



COOLAIREGISTRY

Installation & Configuration Manual

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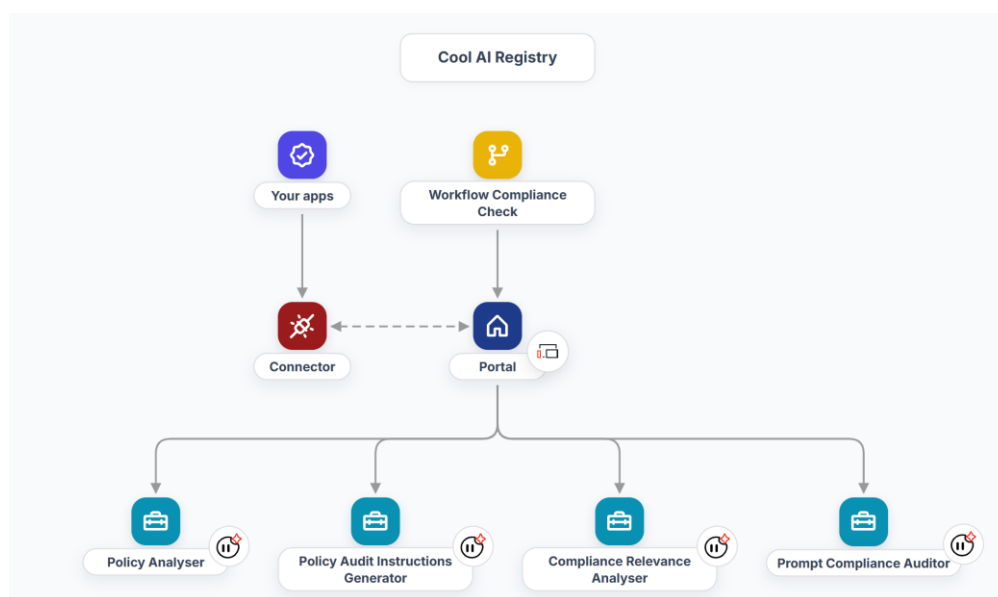
1 Introduction

This document describes the steps required to install, configure, and bootstrap the CoolAIRegistry solution in OutSystems Developer Cloud (ODC).

It includes an installation checklist for guided execution, followed by detailed step-by-step instructions.

Follow the steps in the specified order to avoid authentication or integration issues.

The diagram below illustrates the main components of the CoolAIRegistry solution.



CoolAIRegistry diagram

Domain Configuration

CoolAIRegistry uses two different types of endpoints, each serving a different purpose:

{your-odc-domain}

Used for communication between applications within a specific environment (agents, connector, and portal). These are runtime application endpoints.

{odc-portal-domain}

Used to access ODC REST APIs across the entire organization.

These APIs provide environment-wide information such as deployed applications and configurations.

⚠ Important: These domains are different and must not be interchanged. Using the wrong domain may result in authentication or communication failures.

2 Prerequisites

Before starting the installation, ensure you have:

- Access to OutSystems Developer Cloud (ODC) with permissions to:
 - Create API clients
 - Publish applications
 - Install Forge components
- Access to the required AI models configured in your organization
- Your environment details:
 - {your-odc-domain} - the runtime domain where your applications are hosted
 - {odc-portal-domain} - the domain of your ODC Portal
- Basic knowledge of:
 - ODC applications and deployment
 - REST APIs and OAuth (recommended)

3 Installation checklist

Make sure all prerequisites are completed before proceeding.

Follow the steps below in order.

1. Prepare API access


- a. Create an API Client in ODC Portal (Manage → API Clients)
- b. Save the following values:
 - i. Client ID
 - ii. Client Secret
- c. Retrieve the Token Endpoint using the OIDC Discovery Document

2. Install required Forge components

- a. Install TEXTractor
- b. Install MIME_Detective

3. Publish AI Agents apps (in order)

- a. Publish:
 - i. CoolAIRegistryPolicyAnalyser
 - ii. CoolAIRegistryPolicyAuditInstructionsGenerator
 - iii. CoolAIRegistryComplianceRelevanceAnalyser
 - iv. CoolAIRegistryPromptComplianceAuditor
- b. For each agent:
 - i. Configure the AI Model
 - ii. Set REST API endpoints ({your-odc-domain})

 **Important:** Publish and configure each agent before moving to the next.

4. Publish Connector app

- a. Publish CoolAIRegistryConnector
- b. Configure REST API endpoint ({your-odc-domain})

5. Publish Portal App


- a. Publish CoolAIRegistryPortal
- b. Configure:
 - i. REST API endpoints ({your-odc-domain})
 - ii. ODC API endpoint ({odc-portal-domain})
 - iii. Token Endpoint
- c. Set:
 - i. Client ID
 - ii. Client Secret

6. Import Workflow

- a. Import and publish: CoolAIRegistryWorkflowComplianceCheck

7. Configure security & access

- a. Set the same API Key in:
 - i. All agent apps
 - ii. Connector app
 - iii. Portal app
- b. Grant users access to the Portal app

 **Important:** API Key must be identical across all applications.

8. Bootstrap data

- a. Open CoolAIRegistryPortal
- b. Run: Timer_BootstrapCoolAIRegistry

9. Connect agents to your apps

- a. In each agent application:
 - i. Add event from CoolAIRegistryConnector
 - ii. Implement event handler
 - iii. Return agent prompt

10. Validate installation

- a. Run TestODCAPI in the Portal
- b. Agents are visible in the Portal

4 Detailed installation guide

This section provides detailed instructions for each step in the Installation Checklist.

If you prefer a quick execution flow, follow the Installation Checklist. Refer to this section for additional guidance and configuration details.

4.1 Prepare ODC API Client & Authentication

The CoolAIRegistry solution relies on ODC REST APIs to retrieve and manage platform data. To enable this, you must configure an API Client and authentication settings in your ODC environment.

4.1.1 Reference Documentation

For more information, refer to:

- ODC REST APIs:
https://success.outsystems.com/documentation/outsystems_developer_cloud/odc_rest_apis/
- OAuth 2.0 for APIs:
https://success.outsystems.com/documentation/outsystems_developer_cloud/odc_rest_apis/api_authentication_and_authorization/using_oauth_2_0_to_access_the_apis/
- OIDC Discovery Document:
https://success.outsystems.com/documentation/outsystems_developer_cloud/odc_rest_apis/api_authentication_and_authorization/about_oidc_discovery_document/

4.1.2 Create API Client in ODC Portal

Steps

1. Navigate to **Manage → API Clients** in the ODC Portal.
2. Create a new API Client.
3. Assign permissions that allow access to all required data (including PRD), as the system will retrieve information about deployed applications.
4. Save the generated credentials, you will need them later:
 - **Client ID**
 - **Client Secret**

4.1.3 Retrieve Token Endpoint (OIDC Discovery Document)

Retrieve the token endpoint from your environment's OIDC Discovery Document.

The discovery document URL usually follows:

`https://{odc-portal-domain}/identity/.well-known/openid-configuration`

The token endpoint typically follows this format:

`https://{odc-portal-domain}/auth/realms/{id}/protocol/openid-connect/token`

Save this endpoint — It will be required when configuring authentication in the Portal application.

When configuring {odc-discovery-token-endpoint}, use only the path portion of the URL (everything after `https://{odc-portal-domain}`): `/auth/realms/{id}/protocol/openid-connect/token`

You can validate the ODC API connection later using the 'TestODCAPI' screen in the CoolAIRetryPortal application.

If you encounter issues connecting to the APIs, contact OutSystems support.

Note: This value will be used later when configuring the Portal application, after it has been installed.

4.1.4 Configure API Client Credentials in the Portal App (after installation)

This step is performed after the CoolAIRetryPortal application is installed (see section 4.5).

Open the Portal application settings and set the following values:

- **Client ID**
- **Client Secret**

These credentials allow the Portal to authenticate with ODC APIs during bootstrapping and runtime operations.

4.2 Install Required Forge Components

The CoolAIRegistry solution depends on several Forge components.

These components must be installed and published in your organization before proceeding with the installation.

4.2.1 Install TEXTractor

TEXTractor is used to extract text from uploaded PDF documents.

Forge URL: [TEXTractor - Overview \(ODC\) | OutSystems](#)

4.2.2 Install Mime_Detective

MIME_Detective is used to validate uploaded files and ensure that only PDF documents are processed by the system.

Forge URL: [MIME_Detective - Overview \(ODC\) | OutSystems](#)


4.3 Publish AI Agents applications

Publish the following agent applications in the specified order. Fully configure each agent before proceeding to the next.

1. **CoolAIRegistryPolicyAnalyser**
2. **CoolAIRegistryPolicyAuditInstructionsGenerator**
3. **CoolAIRegistryComplianceRelevanceAnalyser**
4. **CoolAIRegistryPromptComplianceAuditor**
 - Depends on structures from CoolAIRegistryComplianceRelevanceAnalyser. If the agents are published in the correct order dependencies will resolve automatically.

Configuration steps (for each agent)

1. Configure the **AI Model**
 - a. Select an AI model that is already configured in your organization.
 - b. Avoid using trial models, as they may not provide reliable performance.
2. Configure **REST API endpoints**
 - a. Replace {your-odc-domain} with your environment's runtime application domain.


 **Important:** This must be the runtime domain of your deployed applications, not the ODC Portal domain.

4.4 Publish the Connector application

After all AI agent applications have been installed and configured, publish the CoolAIRegistryConnector application.

Configuration steps

1. Configure **REST API endpoint**
 - replace {your-odc-domain} with your environment's runtime application domain.

 **Important:** This must be the runtime domain of your deployed applications, not the ODC Portal domain. Using the wrong domain will prevent communication between the Portal and the agent applications.


4.5 Publish the Portal application

The CoolAIRegistryPortal application must be installed only after all agent applications and the Connector have been published. This application depends on all other components.

Configuration steps

After publishing the Portal app:

1. Configure **REST API Endpoints**
 - replace {your-odc-domain} with your environment's runtime application domain.
 - replace {odc-portal-domain} with your ODC Portal domain.
 - replace {odc-discovery-token-endpoint} with the token endpoint path retrieved in section 4.1.3 ((only the portion after https://{odc-portal-domain}, e.g. /auth/realms/{id}/protocol/openid-connect/token).

 **Important:**

- {your-odc-domain} is used for communication between applications within a specific environment (agents, connector, portal)
- {odc-portal-domain} is used to access ODC APIs across the organization
- These domains are different and must not be interchanged

4.6 Import Workflow

Import and publish the workflow application in the ODC Portal.

Configuration steps

1. Navigate to ODC Portal → Workflows
2. Import the workflow application:
 - a. CoolAIRegistryWorkflowComplianceCheck
3. Publish the workflow.

4.7 Configure security and access


Once all applications have been published, configure security settings and user access in the ODC Portal.

Configuration steps

1. Configure **API Key**
 - a. In the ODC Portal, for each application (agent applications, connector and portal)
 - i. Open the application
 - ii. Navigate to its configuration/settings
 - iii. Set the same API Key value

The API Key is defined by your organization and provides a minimum level of authentication.

All CoolAIRegistry endpoints require this key.

 Important: The API Key must be identical across all applications. Mismatched keys will result in authentication errors.

2. Configure Portal API Credentials
 - a. In the ODC Portal, open the CoolAIRegistryPortal application:
 - i. - Navigate to its configuration/settings
 - ii. Set:
 1. Client ID
 2. Client Secret

Use the values created in section 4.1.2.

3. Grant User Access
 - a. In the ODC Portal:
 - i. Grant users access to the CoolAIRegistryPortal application
 - ii. Ensure intended users can open and run the application

4.8 Bootstrap data

Once all applications are installed and configured, bootstrap your ODC organization data.

This process retrieves and initializes required data, including:

- Environments
- AI Models
- Agent information

All bootstrap timers are available in the CoolAIRegistryPortal application.

Configuration steps

1. In the ODC Portal, open the CoolAIRegistryPortal application.
2. Navigate to the timers section.
3. Trigger one of the following options:
 - a. Run timers individually in the following order:
 - i. Environments
 - ii. AI Models
 - iii. Agent information
 - b. Or run `Timer_BootstrapCoolAIRegistry` to execute the full bootstrap process.

Result

After successful execution:

- Environments are available in the Portal
- AI Models are listed
- Agent metadata is populated

4.9 Connect your agents with CoolAIRegistry

CoolAIRegistry retrieves agent metadata via ODC APIs. However, to access the agent prompt, the system must retrieve it directly from each agent application. This is achieved using the CoolAIRegistryConnector.

Each agent application must subscribe to the Connector event and return its prompt.

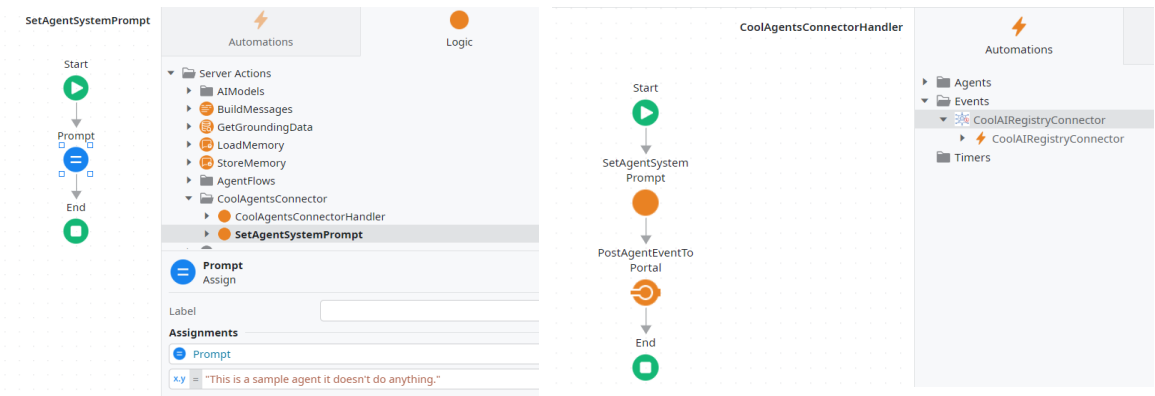
Configuration steps

In each application:

1. Add Connector event
 - a. Add the dependency to the event CoolAIRegistryConnector from the CoolAIRegistryConnector application.
2. Implement event handler
 - a. Create an event handler for the Connector event.
 - b. In the handler, return the agent prompt
3. Create a Server Action for the Prompt
 - a. Implement a server action that returns the agent prompt.
 - b. This action should:
 - i. Contain or build the prompt
 - ii. Be reusable across the application
4. Use the server action
 - a. Call the server action:
 - i. In the Connector event handler
 - ii. In the BuildMessages action (to set the system prompt)

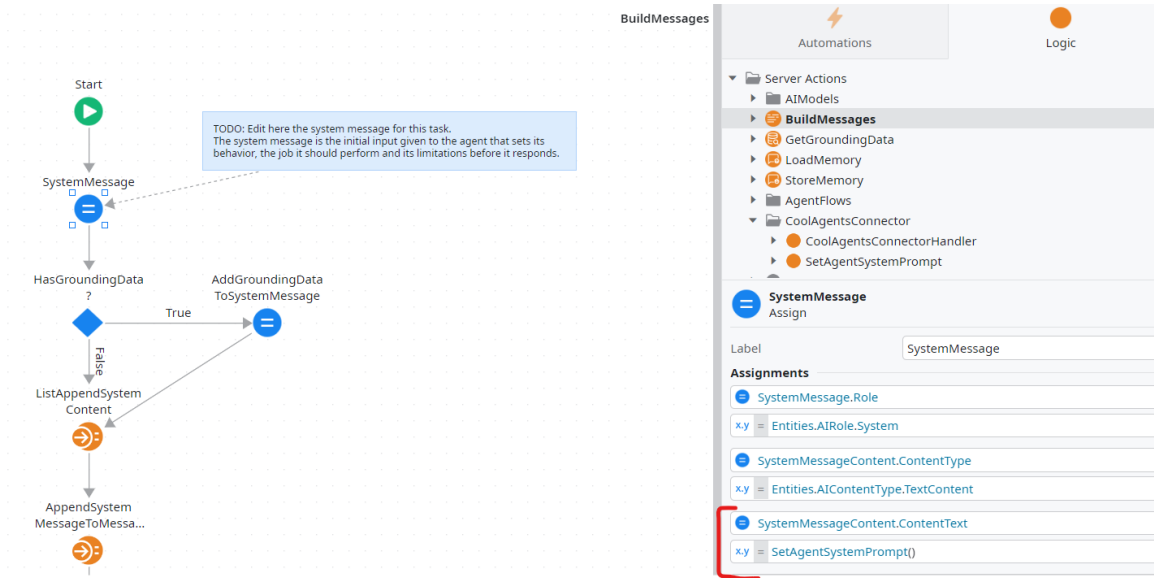
A sample implementation is provided in the installation package: "SampleAgentConnected". This example demonstrates:

- A server action that defines the agent prompt
- An event handler that retrieves and returns the prompt
- Usage of the server action in the BuildMessages logic.



Function that sets the agent prompt

Handler that uses the function and sends the prompt information



Build Messages setting the system prompt by using the server action function

4.10 Final Setup Steps

Once installation and configuration are complete, you can start using the CoolAIRegistry solution.

1. Upload Compliance Guideline

- a. Open the CoolAIRegistryPortal application
- b. Create a new AI Policy
- c. Upload your compliance guideline (PDF)
- d. Create the policy

After creating the policy, the AI agents will automatically start analysing the document.

Analysis Behavior

The analysis process may take some time depending on the document size and AI model performance.

In some cases, a 504 Request Timeout may occur. If a timeout occurs:

- Click "Analyse Policy with AI" to retry
- Or refresh the page

The system will continue attempting analysis while the policy exists.

Result

After successful analysis:

- Compliance Types are generated automatically
- You can review and edit the generated information

To activate the policy: click "Set Effective"

This will trigger a compliance check for all registered agents.

2. Enable compliance check for agent applications

In each agent application where compliance checks are required:

1. Add the Connector event from the CoolAIRegistryConnector application
2. Implement the event handler logic

For detailed instructions, refer to section 4.9.

3. Trigger Check with AI

Once everything is configured: you have an active AI Policy with compliance types and with scopes that apply to an agent prompt; you can trigger the compliance check of your agents – one by one (on its detail page) or for the entire environment.

Run a compliance check from the Portal to validate that:

- Agents are reachable
- Token + API keys are correct

5 Common Errors & Resolutions

401 Unauthorized (When using agents)

Cause:

API Key mismatch between Agents and Portal.

Solution:

Ensure **all modules** have the **same API Key** configured.

401 Unauthorized (During bootstrap)

Cause:

OutSystems OAuth **Client credentials** incorrectly configured or there is an issue connecting to the ODC REST APIs.

Check:

- Client ID
- Client Secret
- Token Endpoint
- Client permissions in ODC
- Endpoint of REST APIs is with {odc-portal-domain}

If you checked everything and it is still not working then create a support case with OutSystems.

504 Timeout When Using AI

Cause:

AI model is too slow or cannot handle the document.

Solution:

- Use a faster/larger model
- Reduce document size
- Check rate limits / model quotas

We don't recommend using a Trial AI Model.

6 Installation Complete

If all steps have been completed successfully, your CoolAIRegistry setup is now fully operational.

You can now:

- Create and manage AI Policies
- Run compliance checks on your agents
- Monitor results through the Portal application

If you encounter issues, refer to the Common Errors & Resolutions section.

Good luck!