ADMIN PORTAL

Rezolve Virtual Agent USER GUIDE

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Rezolve Chat Bot Integration User Guide

Rezolve is a specialized Help desk virtual assistant that can provide instant support to your employees round the clock, increase usage of self-help tools and enhance SLA performances.

Training Rezolve through the Admin Console

You will be provided with login credentials for accessing the Admin Console for Rezolve.

From this console you can do the following:

- View Summary on the Dashboard
- Categorize and Organize the knowledge base
- Manage Q&A – Add and modify simple dialogues (Question & Answer)
- Manage SmallTalk – Add and modify common phrases and relevant responses
- Manage Task - Add known questions or phrases for which Complex Dialogue was created
- Mange Training Failed utterances - Train the bot on questions it failed to answer
- Review Chats
- Run Reports
- Add/Edit Users

Getting Started

Welcome to your Admin Portal!!! In this manual, we will look at the various sections of the Admin Portal, what they are and how to use them.

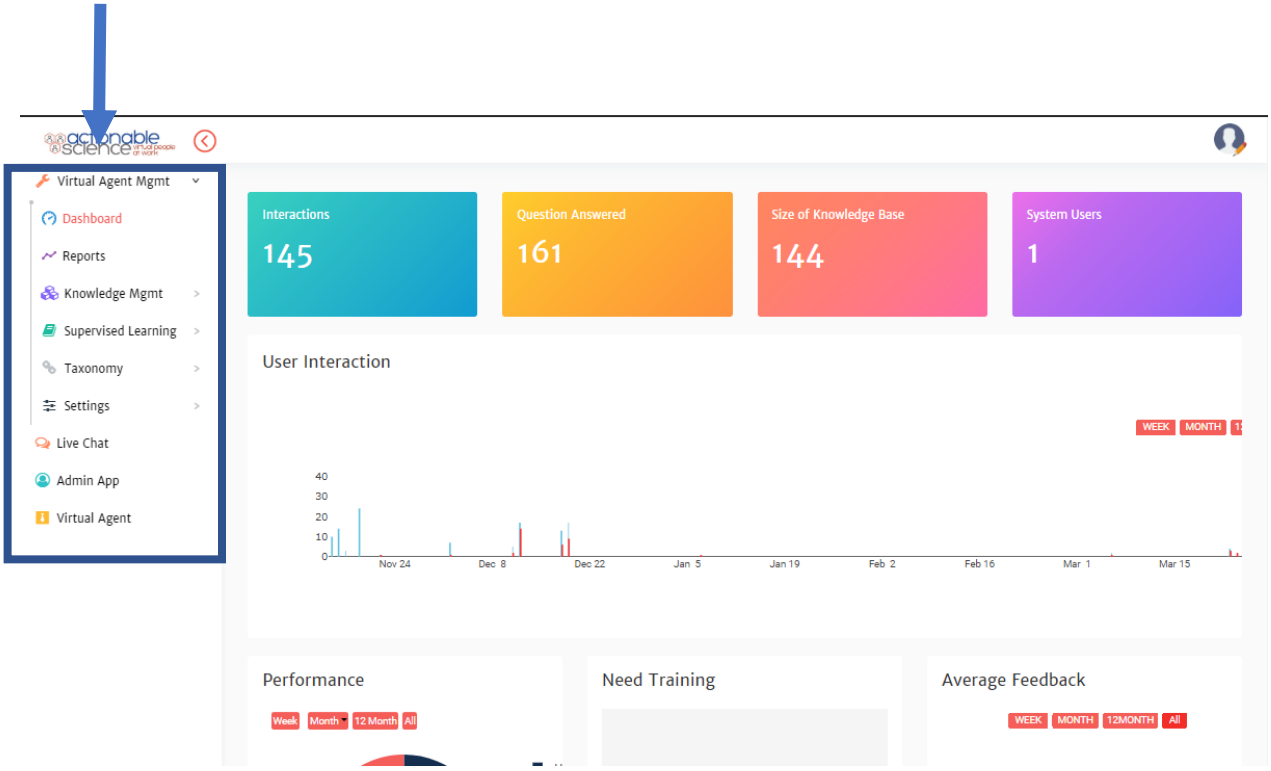
After logging in you are automatically taken to the Dashboard. We will have a more detailed look at this shortly.

On the left of the screen is the Navigation Pane. You will use this to move around the portal. In this manual, we will go over the various sections and how to use them.

Navigation Pane

The Navigation menu can be always be found on the left side of your screen except when using the Virtual Agent section.

What you are able to see in the navigation pane depends on what roles you have been given in the Admin Portal.

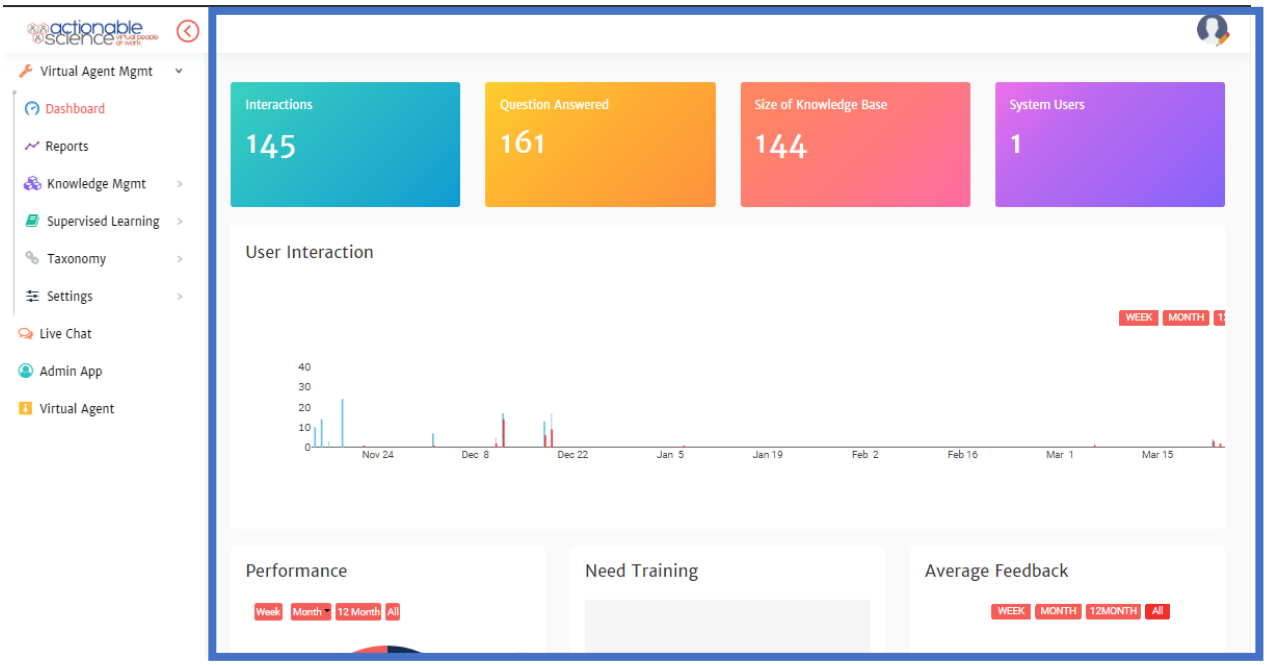


1. ***Virtual Agent Mgmt*** is where you will manage the bot. It includes the Dashboard, Reports, Knowledge Mgmt, Supervised Learning, Taxonomy, and Settings.
2. ***Ticket Mgmt*** is used to manage the Ticketing system. It includes My Tickets (ticket landing page with SLA dashboard) and Ticket Settings.

3. ***Live Chat*** is used to manage the Live Chat. It includes My Chats (Dashboard for chat section), Live Chat Settings, and Review Chat.
4. ***Admin App*** is used to manage users and attributes for restricting their usage. It includes the User Management and Attribute modules.
5. ***Virtual Agent*** is where you can test the bot.

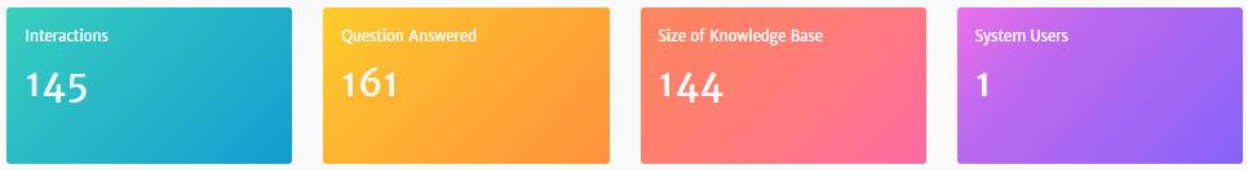
Dashboard

On the Dashboard, you can find some basic information on the bot performance

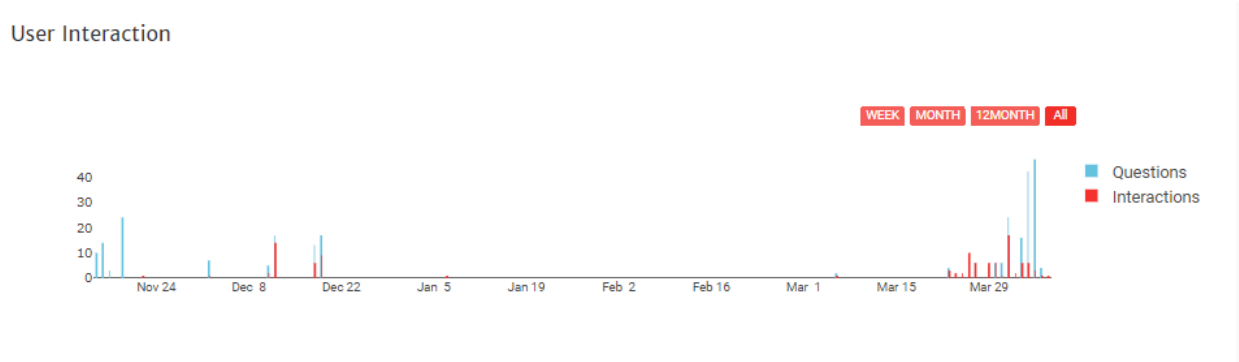


The top section of the four boxes covers:

- Interactions - gives you an overview of the number of chats with the bot
- Question Answered - questions the bot answered
- Size of Knowledge Base - how many dialogues the bot is trained on
- System Users - number of users who have accounts to access the bot in the portal



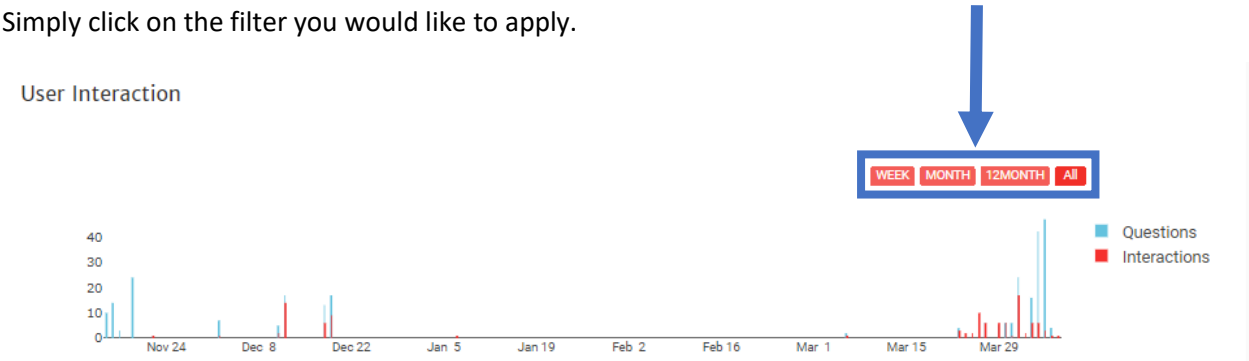
In the next section, the table looks at the number of chats and how many questions the bot has been asked by date. We differentiate the two since in one chat a user can ask multiple questions.



You can filter the view by:

- Week
- Month
- 12 Month
- All

Simply click on the filter you would like to apply.



In the next section, a pie graph and multiple tables.

The Performance pie graph shows you how many chats the user said the answer was helpful or not helpful by date.

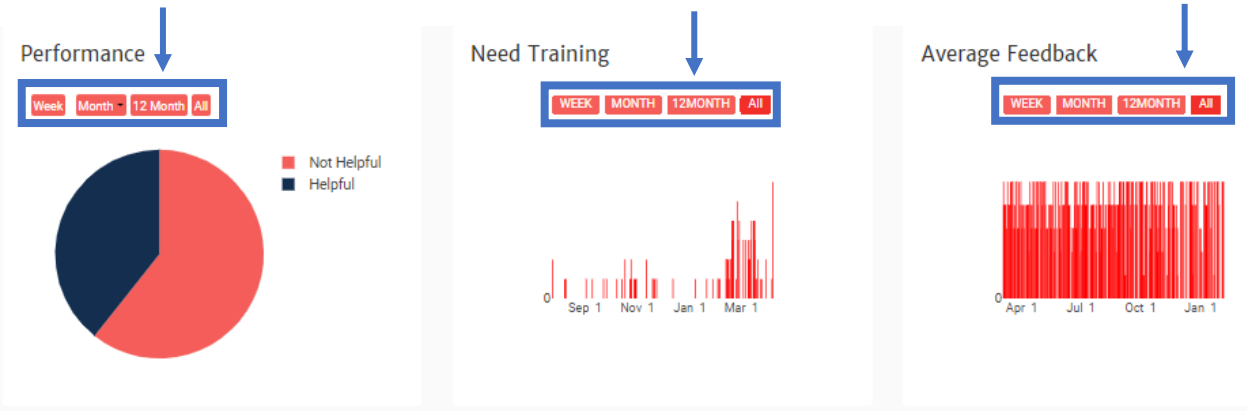
The Need Training bar graph looks at the questions that the bot was unable to answer that it hasn't been trained on yet by date.

The Average Feedback bar graph looks at the feedback rating. At the end of a chat, the user may submit overall feedback with a star rating and comments. This graph looks at the star rating by date.

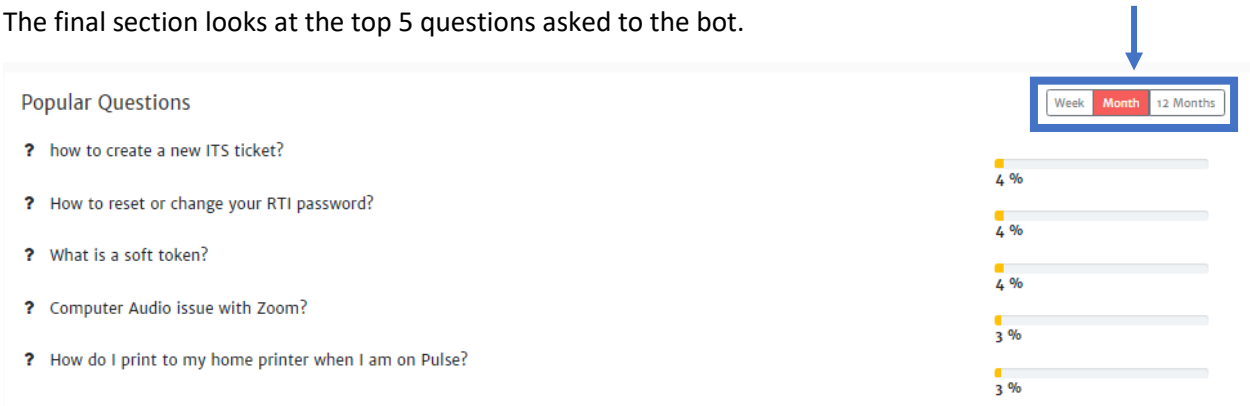
You can filter the view of each by:

- Week
- Month
- 12 Month
- All

Simply click on the filter you would like to apply.



The final section looks at the top 5 questions asked to the bot.

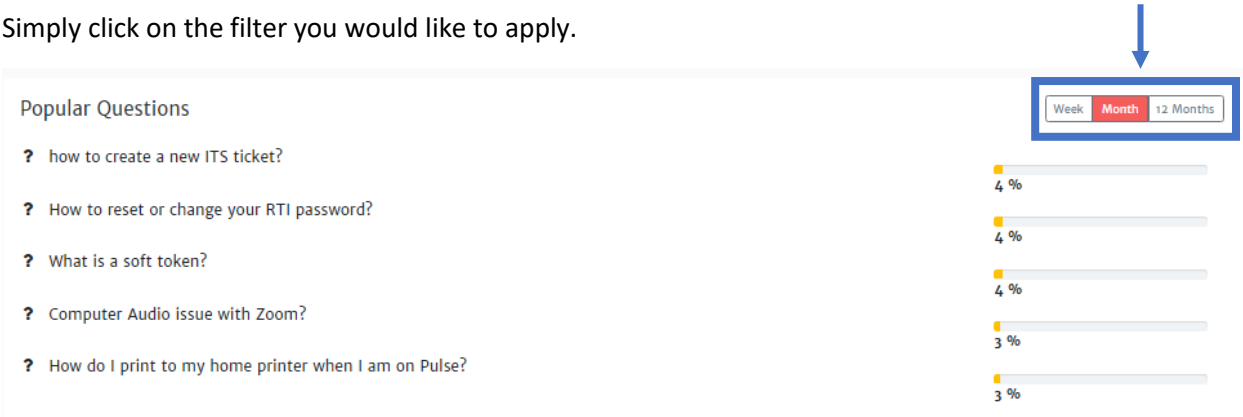


You can filter the view of each by:

- Week
- Month
- 12 Month

- All

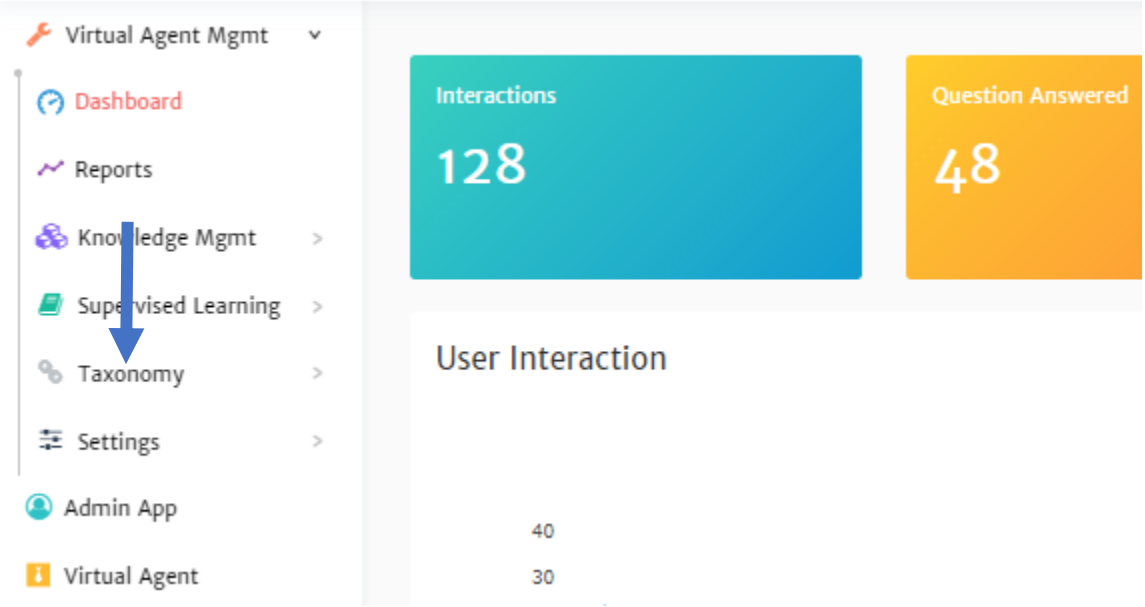
Simply click on the filter you would like to apply.



Categorize the Knowledge Base

To enable the ability to categorize articles/questions into logical groups that can later be used as an easy search, you will need to define and create these groups or tags in the **Taxonomy** section.

In this section, you can create groups based on hierarchy and category. There are two types of tags in this section, Hierarchal tags and Simple tags.



Hierarchy Tags

Hierarchy tags are used to define and categorize the bulk of a knowledge base.

Define Classification

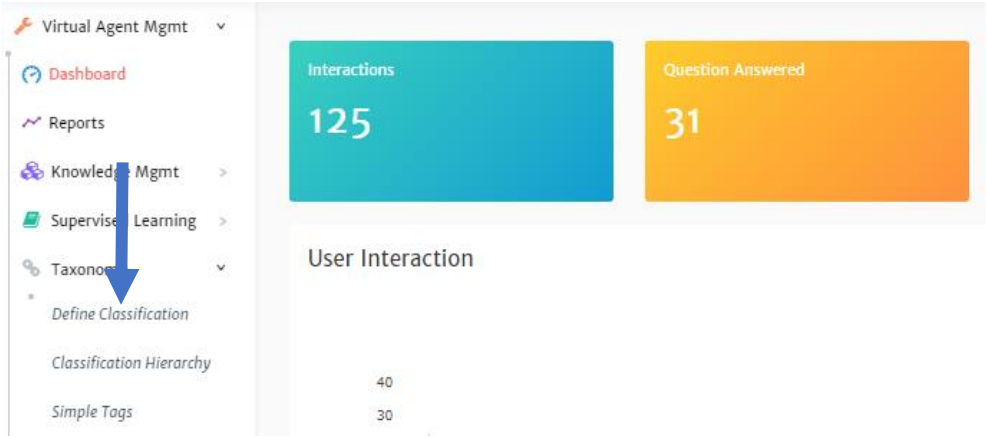
The first part of creating Hierarchy tags is defining how you would like it organized in a hierarchal order (i.e. Level 1, Level 2, Level 3 etc) in Define Classification.

NOTE: Actionable Science supports up to 5 levels of hierarchy.

To define the classification of a knowledge base:

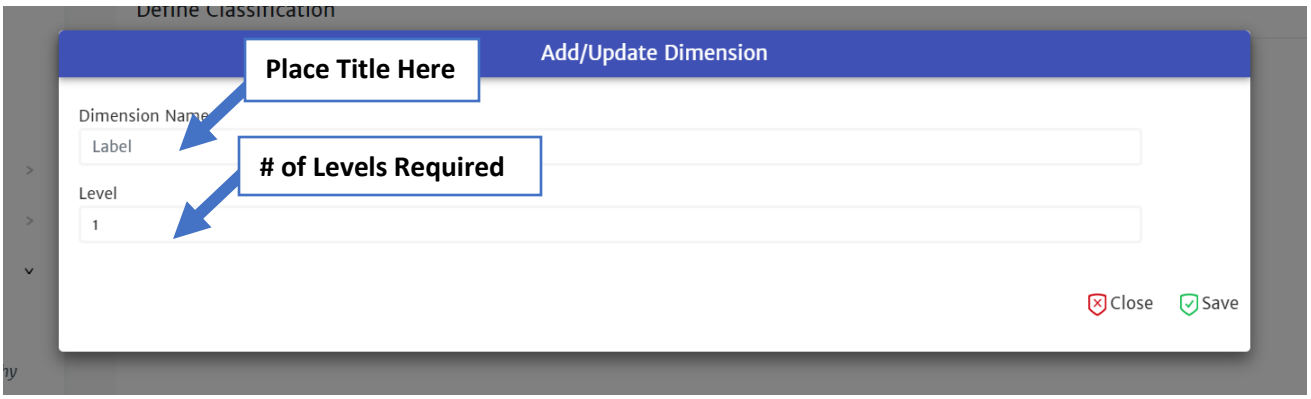
1. Click **Taxonomy** in the navigation pane on the left of your console

2. Click **Define Classification** in the navigation pane on the left of your console



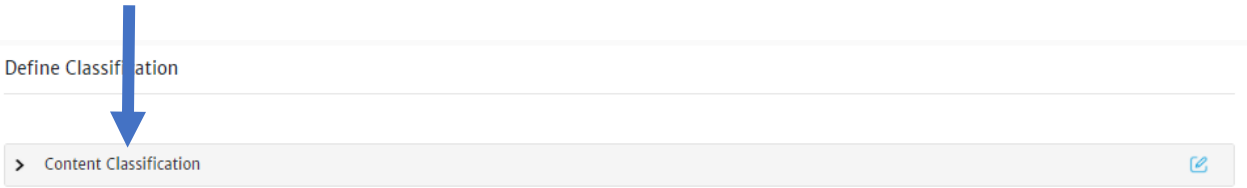
3. Click the **+** next to *ADD A NEW DIMENSION*

4. Add the *title* of the hierarch and the *number of levels* it should have

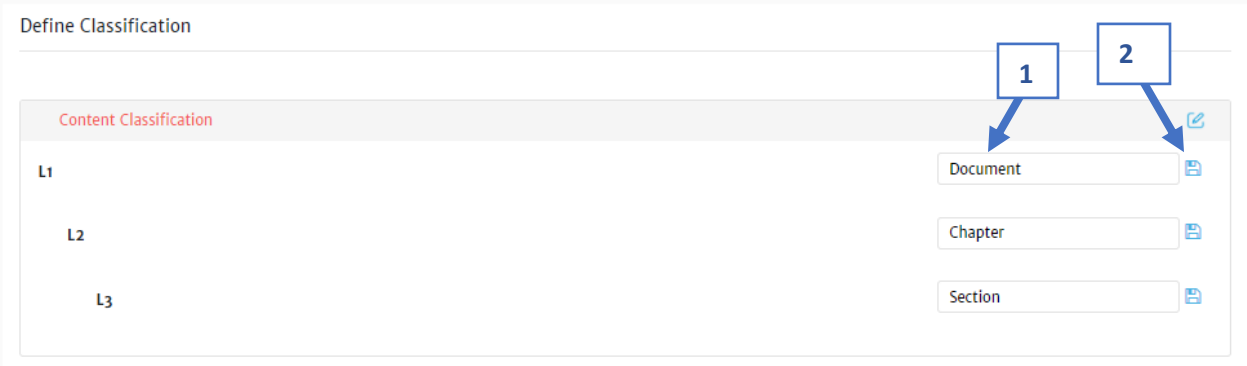


Important Note: Once you click save, the only way to make changes (i.e. change # of levels) is by contacting Actionable Science. The tags can not be in use on any of the existing documents. If it is, Actionable Science will not be able to make any changes.

5. Click **Save**
6. You should now see the *title* of your hierarchy, click on that title



7. Give each a level a label and then click the save button next to each individually (looks like a disk)
    - Think of these as headers that will define what each level will contain. i.e. Applications, Product etc

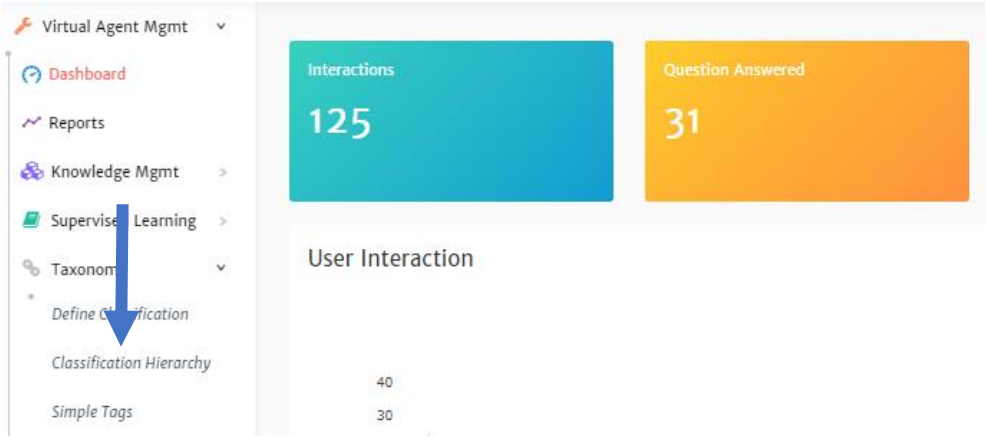


Managing Classifications

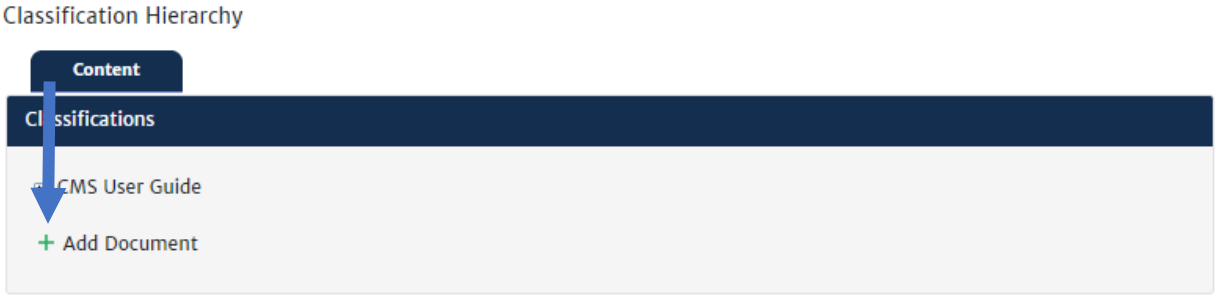
Once classifications have been defined, you can start building out your classification hierarchy by adding tags to each level.

Add Hierarchy tags:

1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Classification Hierarchy** in the navigation pane on the left of your console



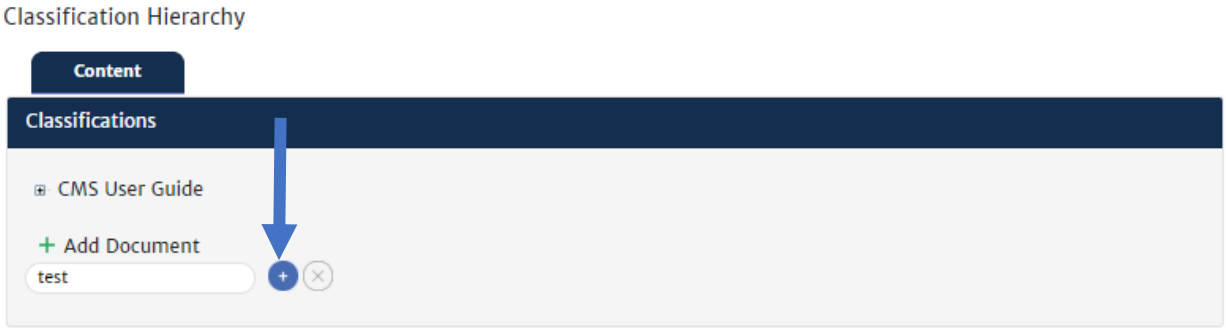
3. You will see a green + next to *Add (Label name of Level 1),* click the green +



4. Type in the name of the Level 1 tag

5. Click the **+** sign to add your tag

   NOTE: If you click the X instead this will cancel the added category

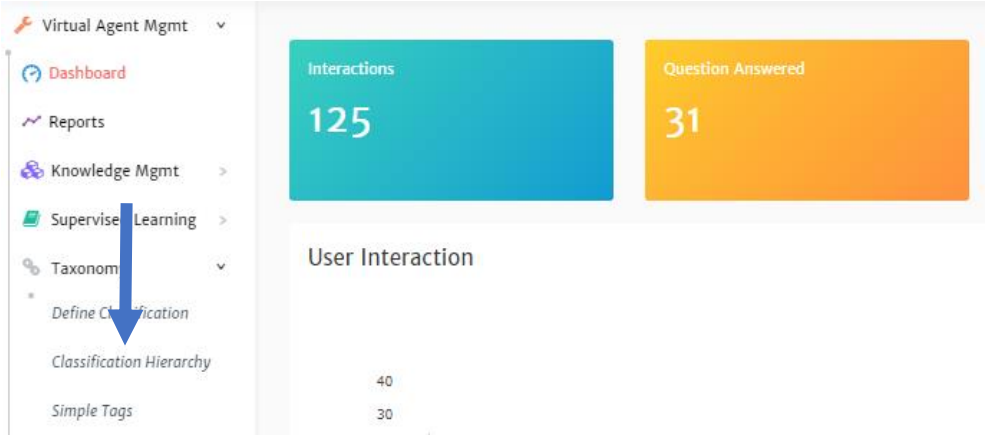


6. This category will now show in the list. You will repeat the above steps to create any additional Level 1 tags.
   - If you have created multiple levels, you will see a green + next to *Add (Label Name of Level 2).* Click the green + to add your sub-tag.
   - If you would like to add multiple sub-categories, make sure the section you want to add it to is highlighted and click the green + next to *Add (Level Label)*.
   - Do this for all sub-levels.

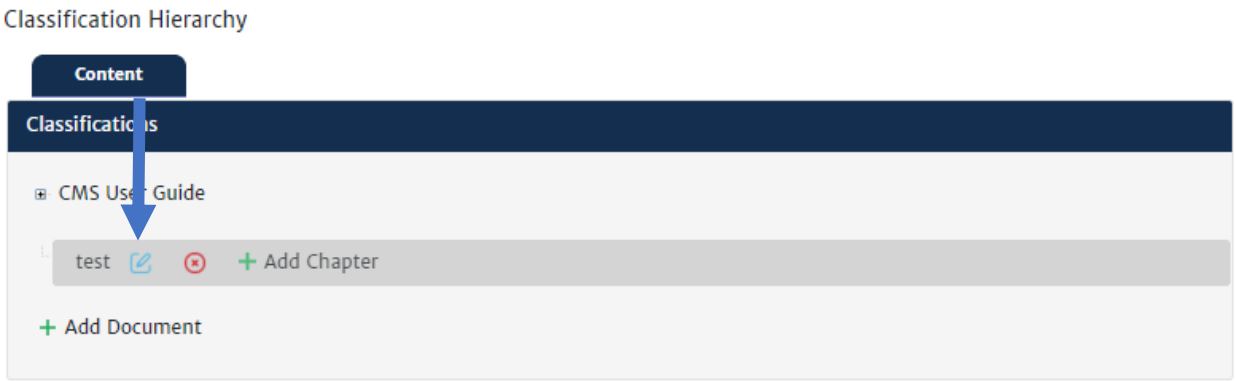
Modifying a Hierarchical tag

Important Note: The tag you would like to edit, must be removed from all dialogues before editing or removing it.

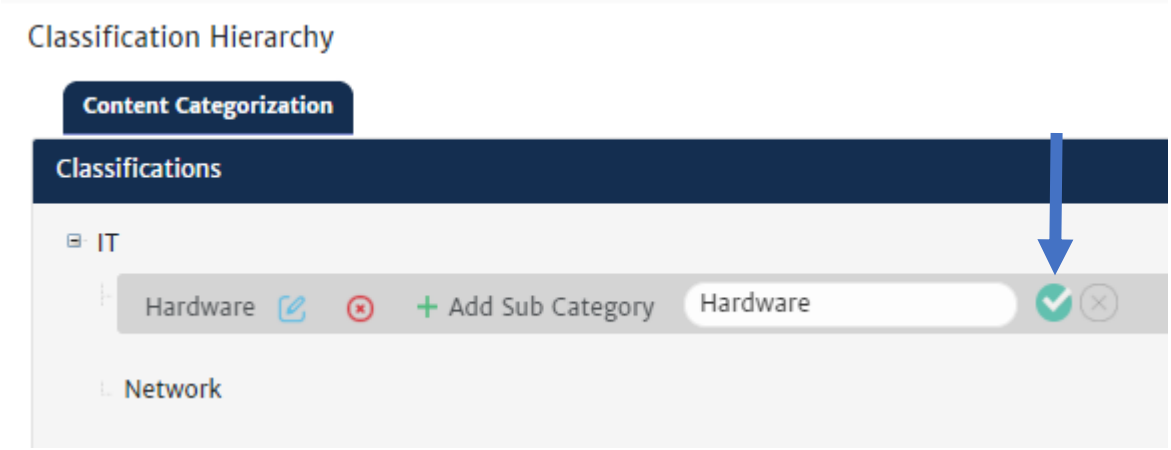
1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Classification Hierarchy** in the navigation pane on the left of your console



3. Highlight the tag you would like to edit
4. Click the pencil icon next to it



5. Make your changes
6. Click the checkmark next to the edit area to save

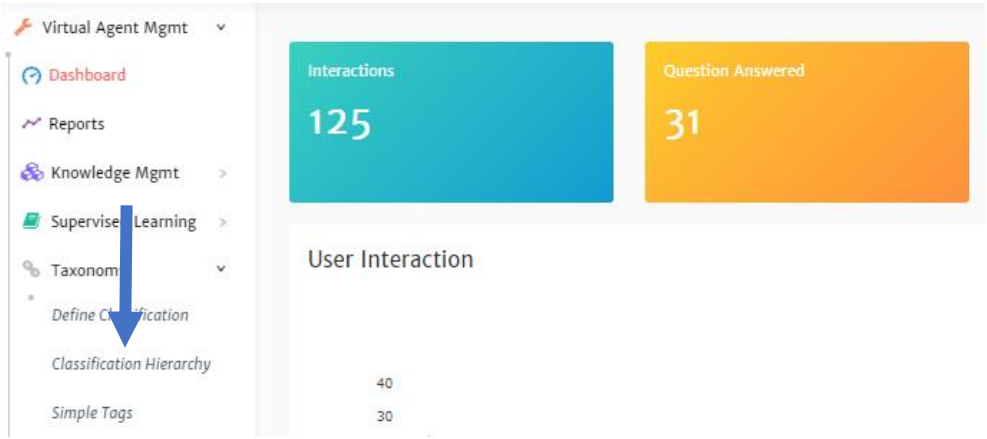


The system will start applying the change when complete you will see a Successful message.

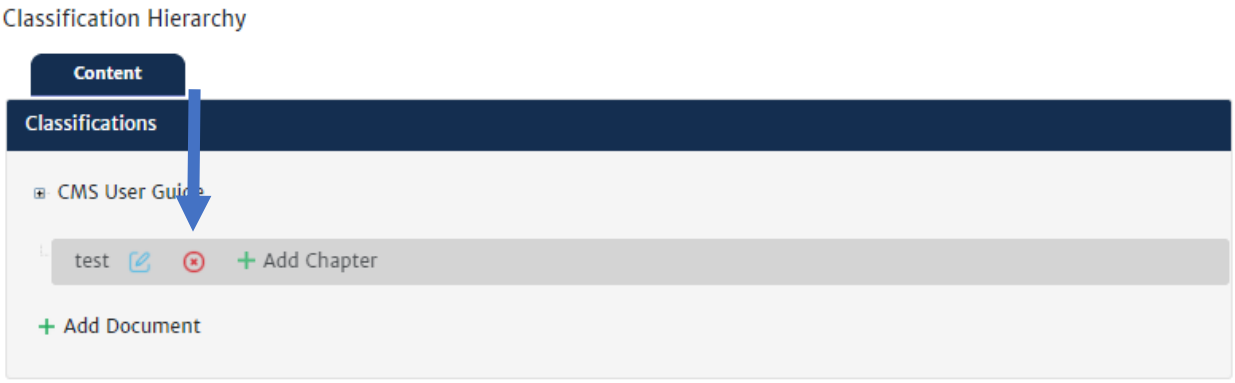
Delete a Hierarchial tag

Important Note: The tag you would like to delete, must be removed from all dialogues before removing it.

7. Click **Taxonomy** in the navigation pane on the left of your console
8. Click **Classification Hierarchy** in the navigation pane on the left of your console



9. Highlight the tag you would like to remove
10. Click the **X** next to it



Simple Tags

Simple tags are used to define and categorize things that may not fall under your hierarchy. This can be anything from locations, business units to temporary projects.

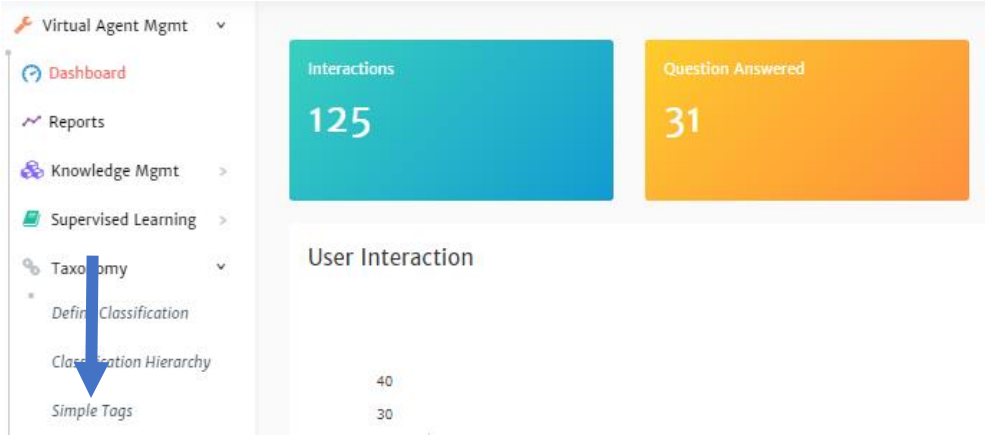
This is a two-part process. You must first create your Metadata and then add values to it. Think of the Metadata as a title that explains the values.

NOTE: Actionable Science supports up to 4 Simple tags.

Create a simple tag

Creating the Metadata

1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Simple Tags** in the navigation pane on the left of your console



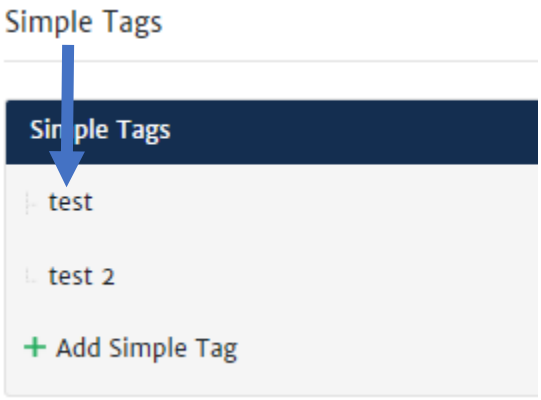
3. Click + **Add Simple Tag**
4. Type the name of the simple tag metadata
5. Click the **+** to add it

NOTE: If you click the X instead this will cancel adding the simple tag.

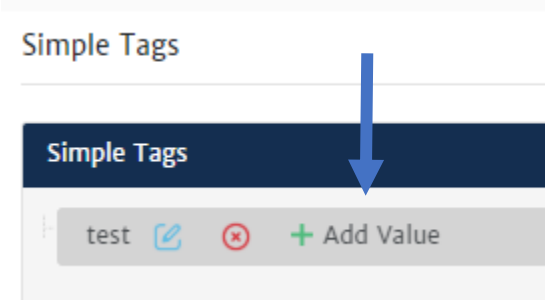
Adding Values to a Simple Tag Metadata

You have to add a Value to a Simple Tag Metadata to be able to add it to dialogues.

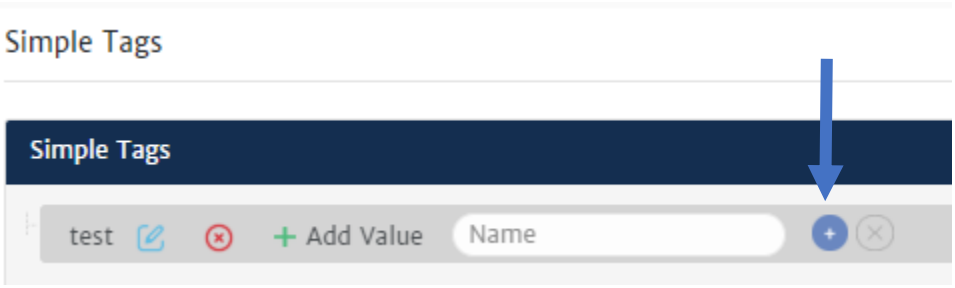
1. Click on the Simple tag Metadata that a Value will be added



2. Click on **+ ADD VALUE**



3. Type the name of your Value
4. Click the **+** icon



You may start adding this Simple Tag to dialogues.

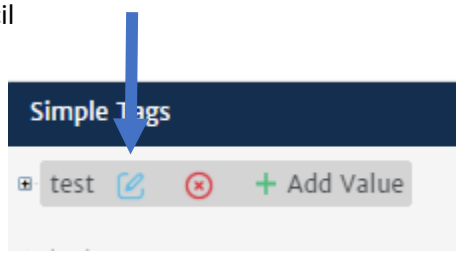
Modify a Simple tag

The Simple Tag that will be edited, must be removed from all dialogues that it is tagged on before editing it.

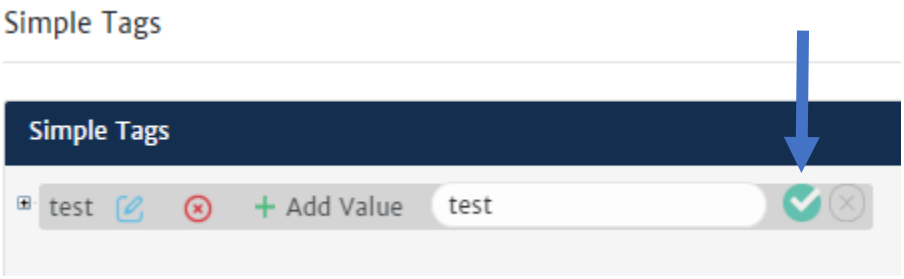
Modifying the Metadata

1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Simple Tags** in the navigation pane on the left of your console
3. Click on the Simple tag that will be modified

4. To edit, click on the pencil



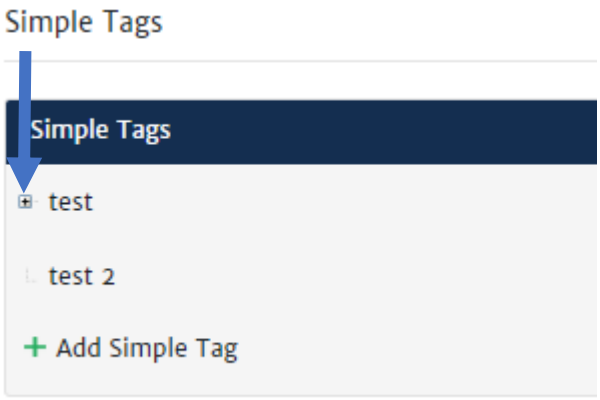
5. Make your changes
6. Click the checkmark next to your edited text



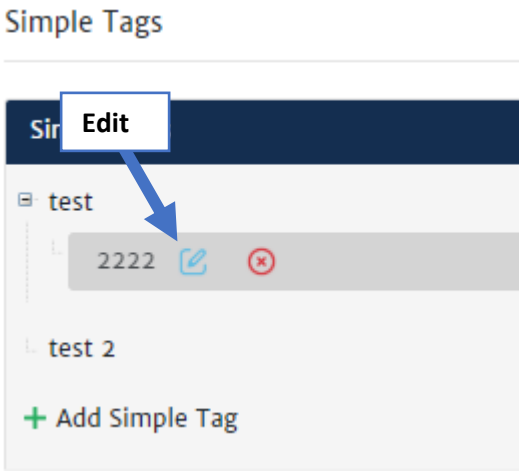
Your changes have been saved.

Modifying the Values of a Simple Tag Metadata

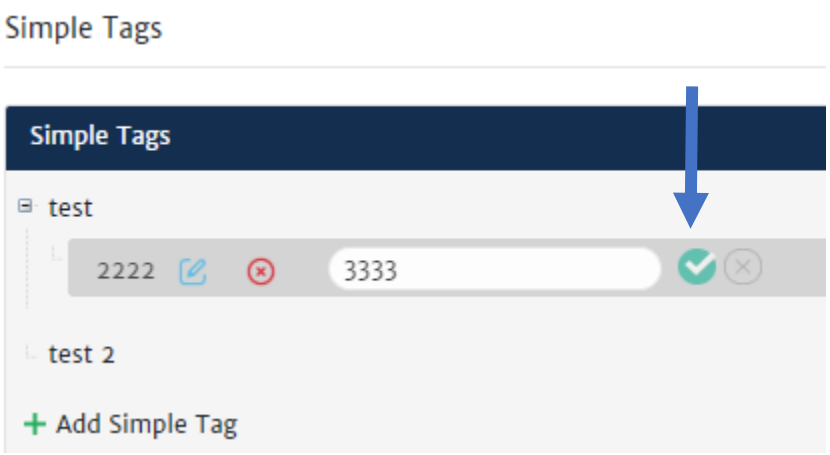
1. Click on **+** in front of Simple tag Metadata that a Value will be edited



2. Click on the Value you would like to edit
3. Click on the pencil



4. Make your changes
5. Click the checkmark to save



Your changes have been saved.

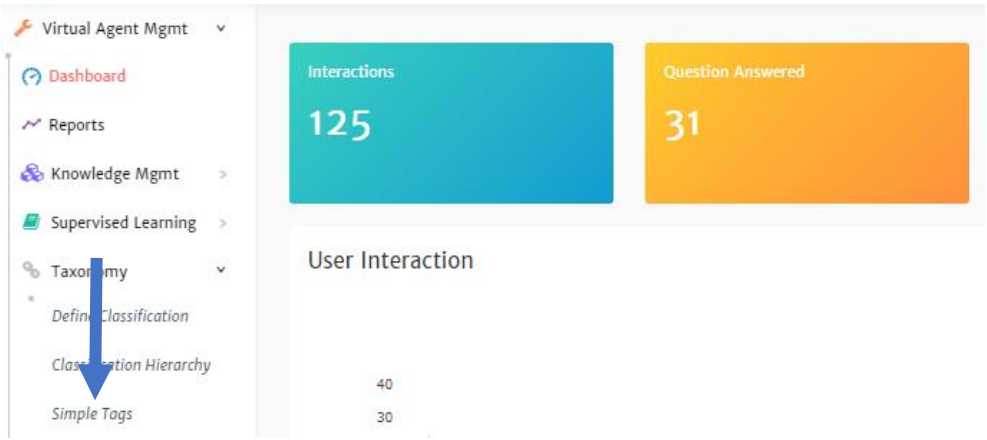
Deleting a Simple tag

The Simple tag that will be deleted, must be removed from all dialogues that it is tagged on before removing it.

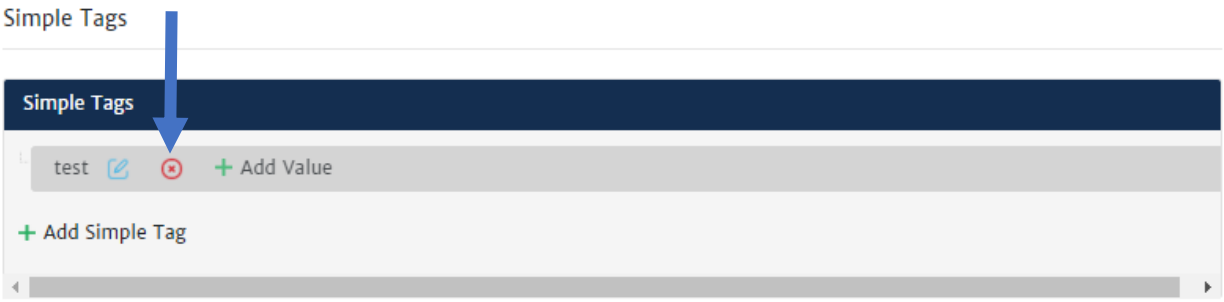
Deleting Metadata

By deleting the Metadata level of a simple tag, you will be deleting the values associated with it.

1. Remove the Simple Tag that will be deleted from all existing dialogues
2. Click **Taxonomy** in the navigation pane on the left of your console
3. Click **Simple Tags** in the navigation pane on the left of your console



4. Highlight the tag you would like to remove
5. Click the **X** next to it

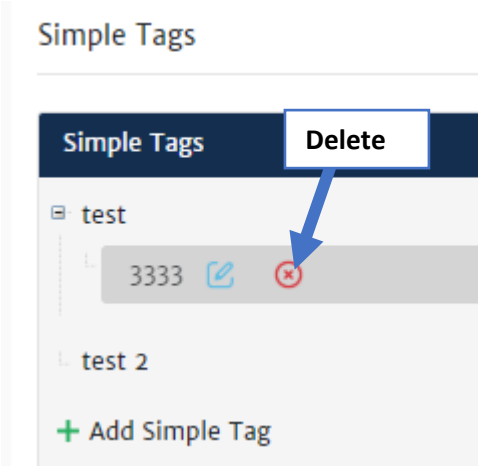


Deleting the Values from a Simple Tag Metadata

The Simple tag of the Value that will be deleted, must be removed from all dialogues that it is tagged on before removing it.

1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Simple Tags** in the navigation pane on the left of your console
3. Click on **+** in front of Simple Tag associated with the Value you would like to delete

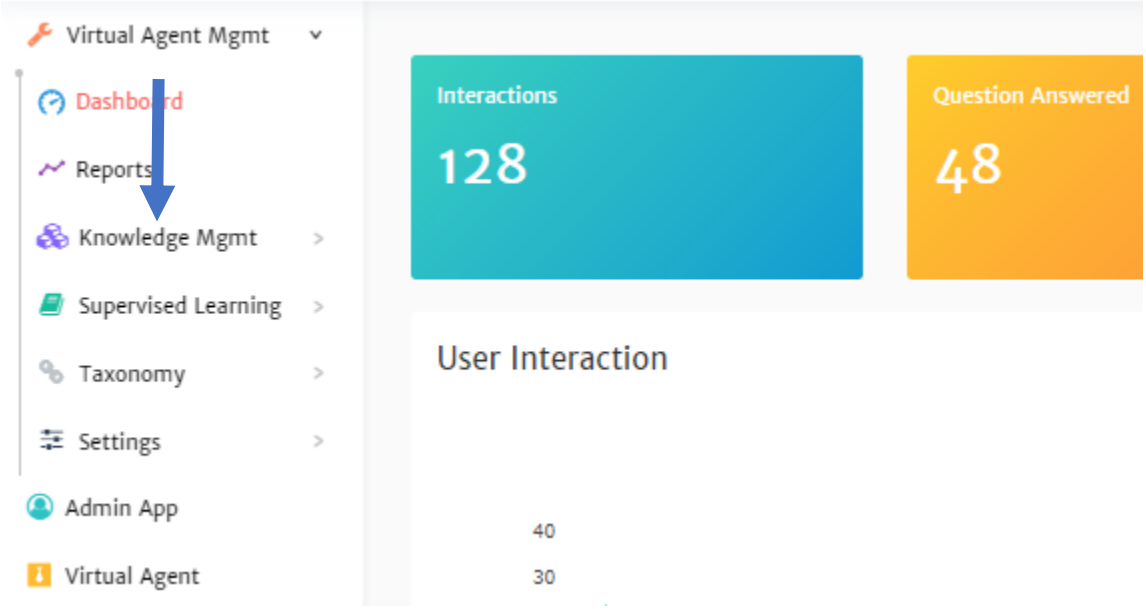
4. Click on the viewable group you would like to edit or remove
5. To delete, click on the X



The value is now removed.

Manage Q&A

In **Manage Q&A**, you can add, edit and delete simple dialogues. It can be found under the **Knowledge MGMT**.

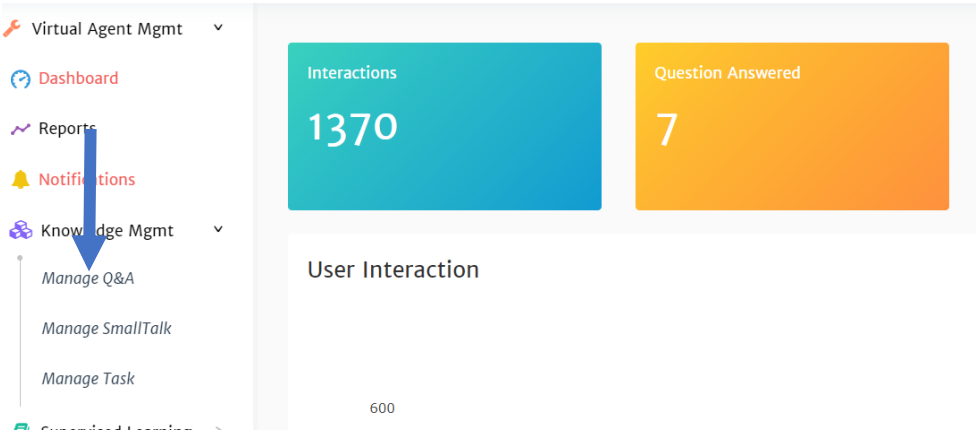


You might be asking yourself what is a "simple dialogue". Simple dialogues are when a question is asked, and the bot provides an answer (no need for back and forth between the user and the bot).

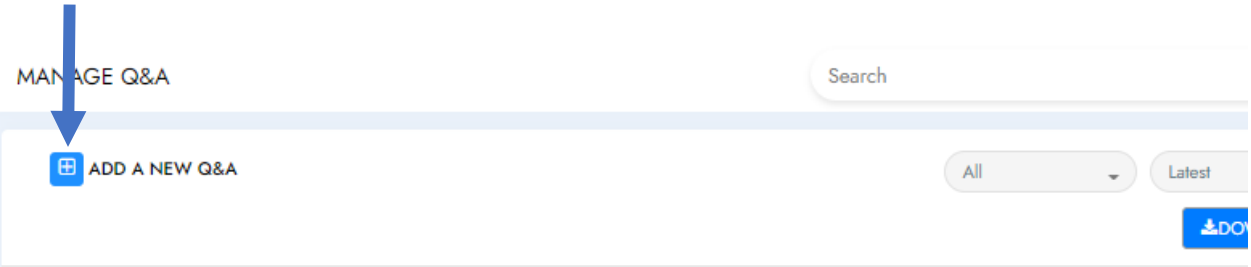
Simple Dialogue

Creating Simple Dialogue

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console



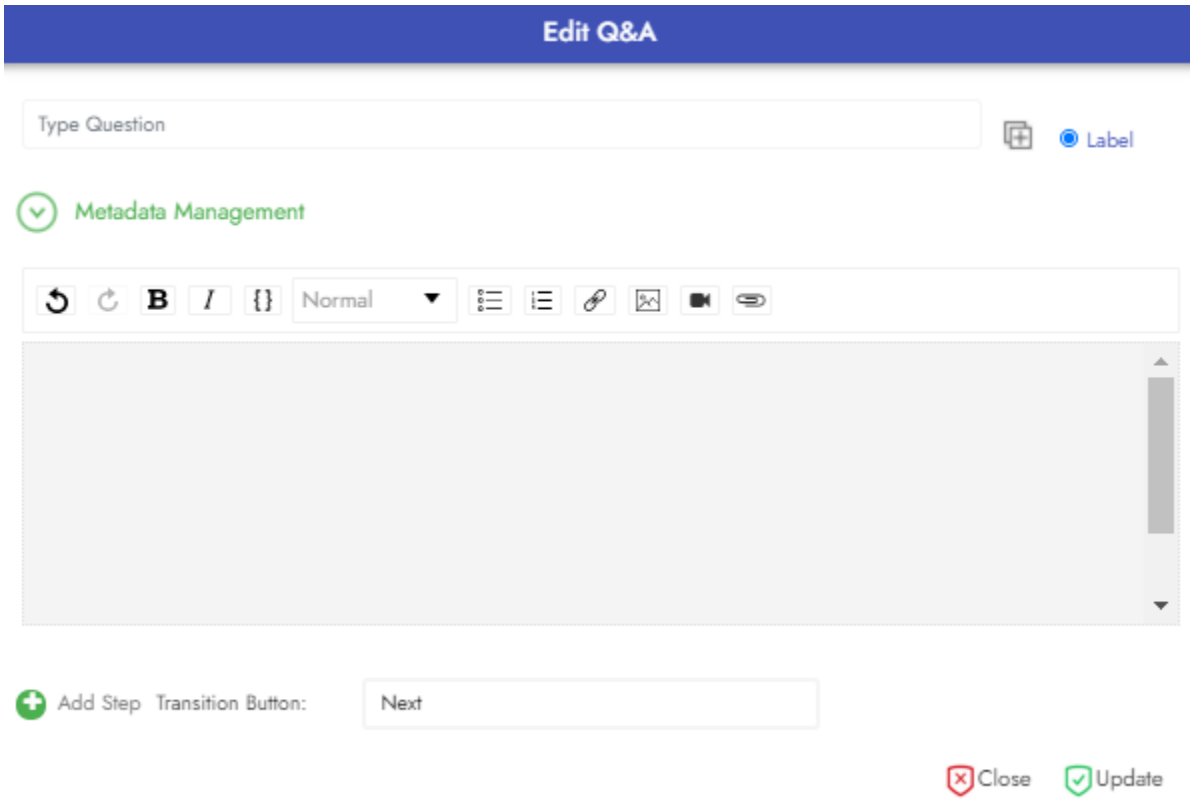
3. Click on **+** next to *ADD A NEW Q&A*



4. This will open the Text Editor

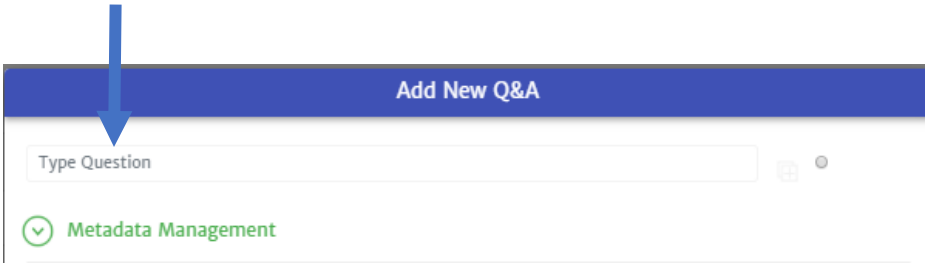
Using Text Editor

The text editor in Manage Q&A is used to create and format simple dialogues. These dialogues can include text, images, hyperlinks, and/or gifs. Once created, these articles become part of the knowledge base of the bot.

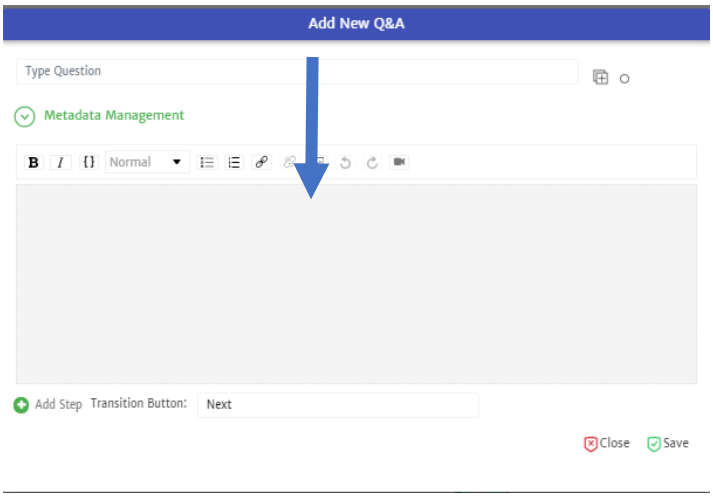


1. After opening the text editor, type the question associated with the response/answer you will be creating in the *Type Question* box

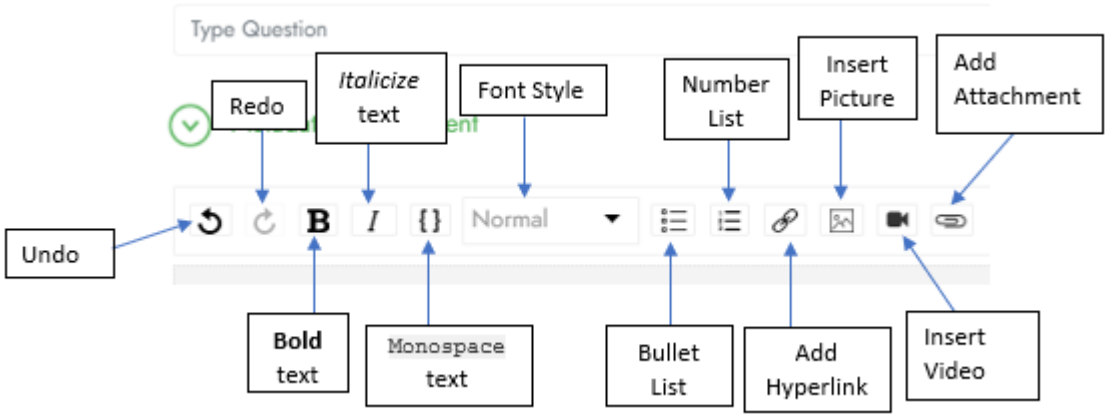
- When creating this keep in mind what a user will ask the bot and how you will have the bot respond
- If multiple dialogues may be relevant to the user's question, what will make them identify this as their answer? This is the label that will appear as an option for them to click on



2. Type the response/answer in the answer box



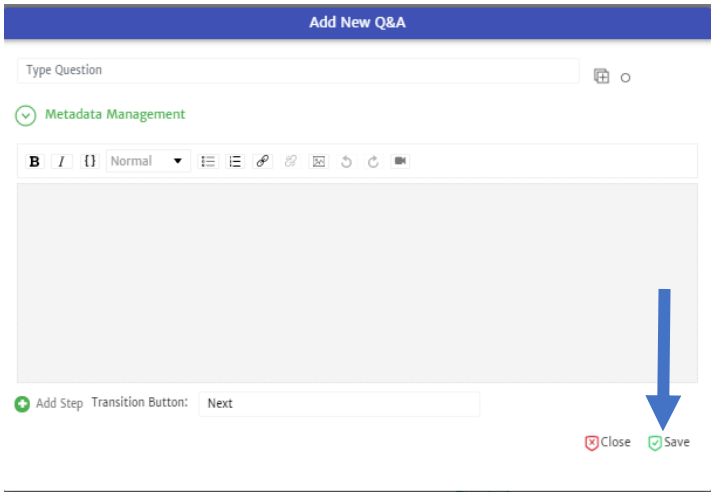
3. When creating your response/answer you can use the toolbar to format your response.



NOTE: For the steps on how to add a picture please refer to Adding Picture. For steps on how to add a video please refer to Adding a Video. For steps on how to add a hyperlink please refer to Adding a Hyperlink.

Important Note: If you have created tags you will want to add them at this point. Please read the *Adding Hierarchical and Simple Tags* section. Also, it is possible to add alternative questions that you want to trigger the bot to give your current dialogue. Please read the *Adding Simple Dialogue Utterance Variants* section for the steps.

4. Click **Save** when complete

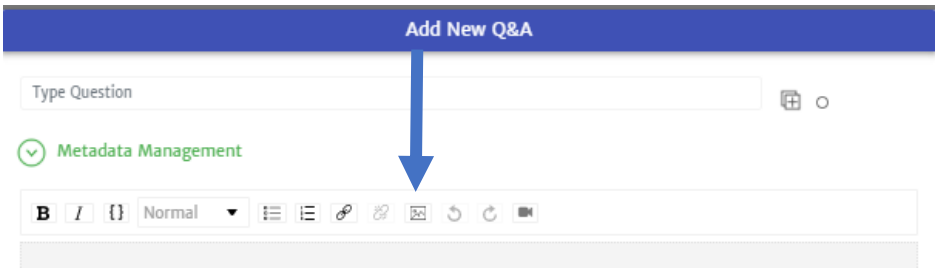


Adding Pictures

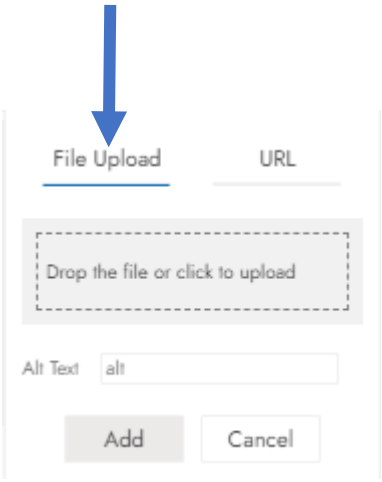
From PC

To add a picture from a PC to your dialogue:

1. Place the cursor on the line you would like the image
2. Click the Picture Upload button

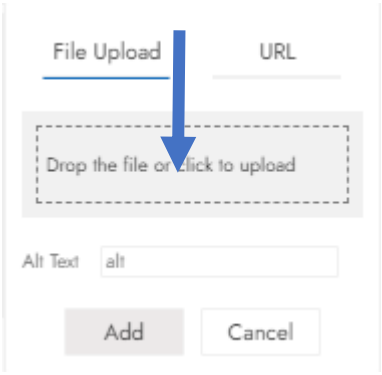


3. Select the source of your picture, "File Upload"
    - To upload a picture saved on your computer, make sure the "File Upload" option is selected. (Has a blue line under it)



4. Add the picture to be added
    - This can be done by drag and drop the file or click in the gray upload box

Important Note: Filename of images should not contain periods, dashes or underscores to avoid issues.

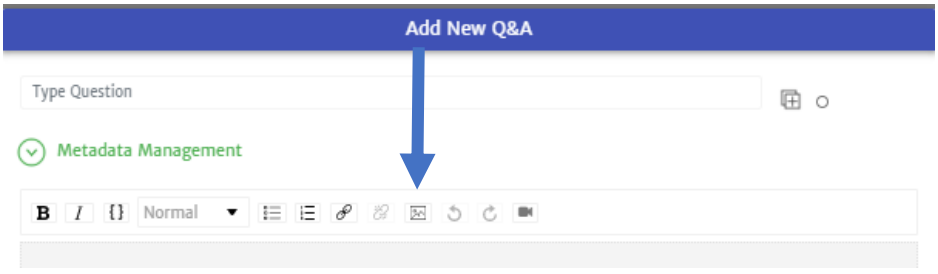


5. Click **Add**

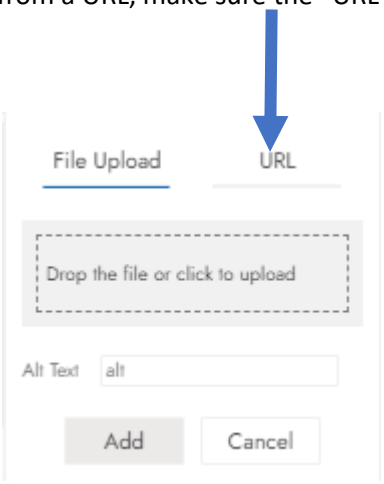
From URL

To add a picture from a URL to your dialogue:

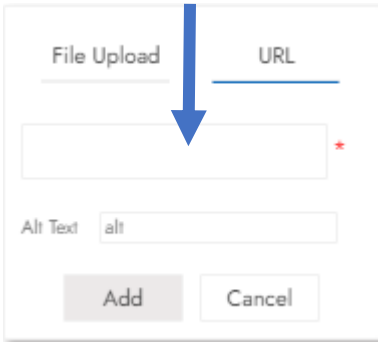
1. Place the cursor on the line you would like the image
2. Click the *Picture Upload* button in the toolbar



3. Select the source of your picture, “URL”
    - To upload a picture from a URL, make sure the “URL” option is selected. (Has a blue line under it)



4. Add the URL of the picture to be added



5. Click **Add**

Adding a Video

When adding a video make sure the video file is:

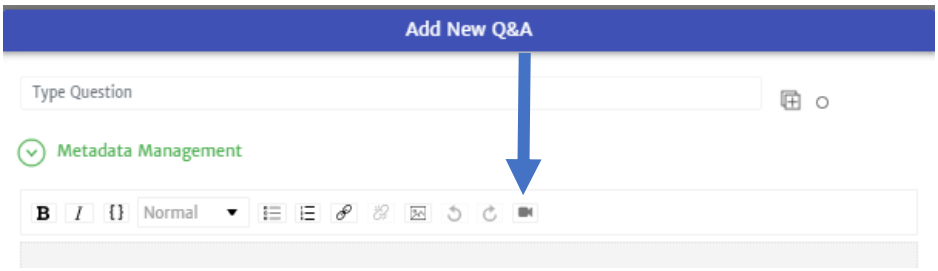
- No more than 10 MB
- MP4 format

From PC

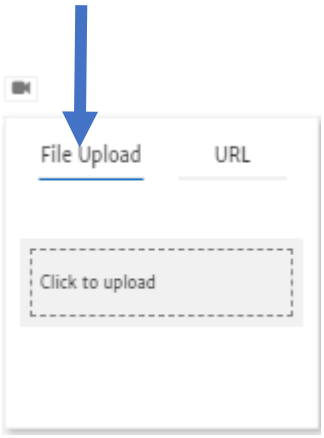
To add a video from a PC to your dialogue:

1. Place the cursor on the line you would like the video

2. Click the Video Upload button

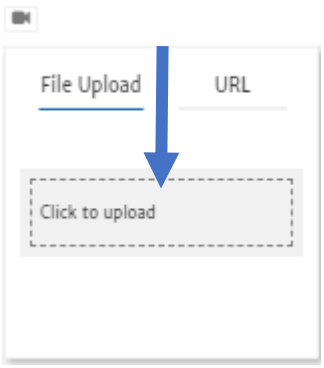


3. Select the source of your video, “File Upload”
    - To upload a video saved on your computer, make sure the “File Upload” option is selected. (Has a blue line under it)



4. Add the video to be added
    - This can be done by click on the gray upload box

Important Note: Filename of images should not contain periods, dashes or underscores to avoid issues.

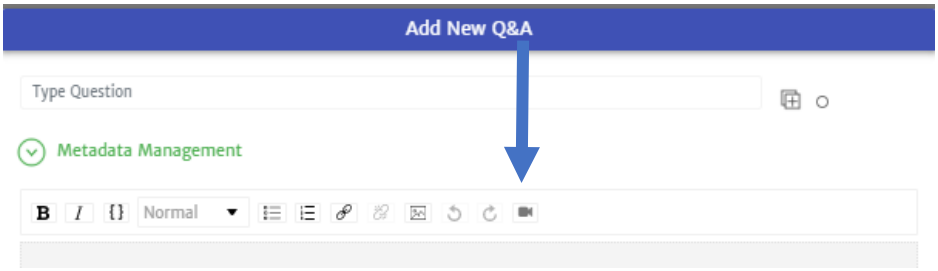


5. The file will start uploading and will return you to the text editor screen when complete

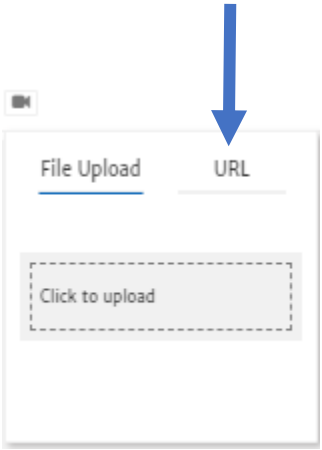
From URL

To add a video from a URL to your dialogue:

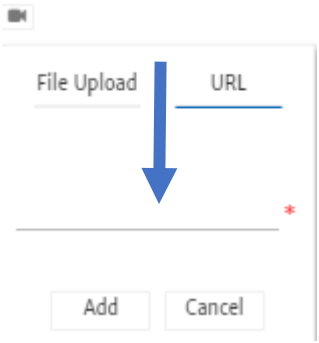
1. Place the cursor on the line you would like the image
2. Click the *Video Upload* button in the toolbar



3. Select the source of your video, “URL”
    - To upload a video from a URL, make sure the “URL” option is selected. (Has a blue line under it)



4. Add the URL of the video to be added



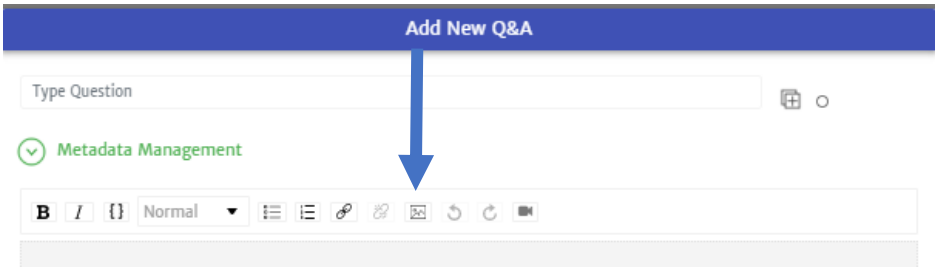
5. Click **Add**

Adding GIF

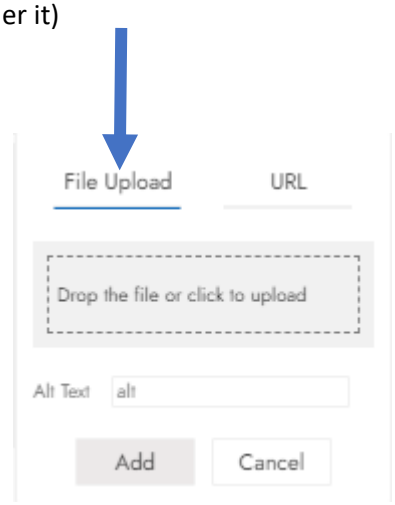
From PC

To add a GIF from a PC to your dialogue:

1. Place the cursor on the line you would like the image
2. Click the Picture Upload button

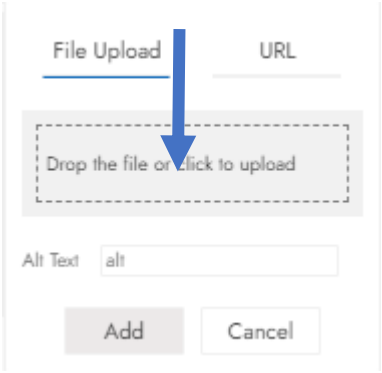


3. Select the source of your GIF, “File Upload”
    - To upload a GIF saved on your computer, make sure the “File Upload” option is selected. (Has a blue line under it)



4. Add the GIF to be added
    - This can be done by drag and drop the file or click in the gray upload box

Important Note: Filename of GIF should not contain periods, dashes or underscores to avoid issues. There is also a File size limit of 10mb.

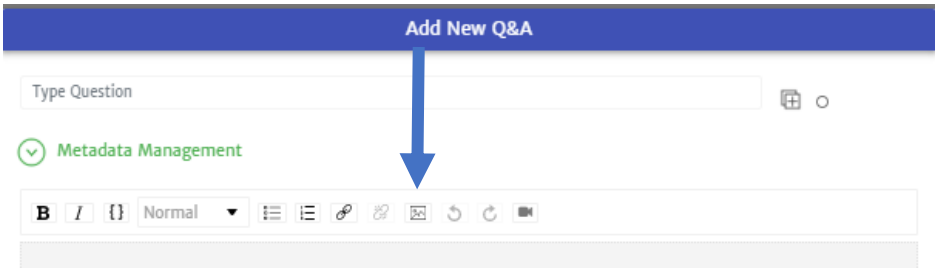


5. Click **Add**

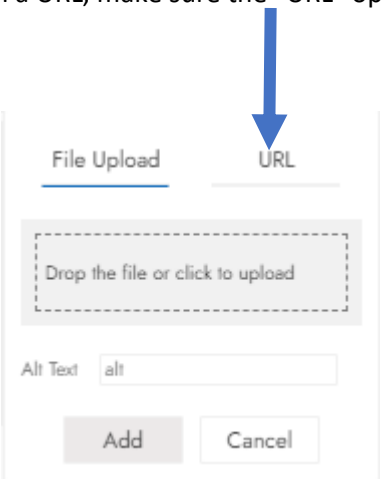
From URL

To add a GIF from a URL to your dialogue:

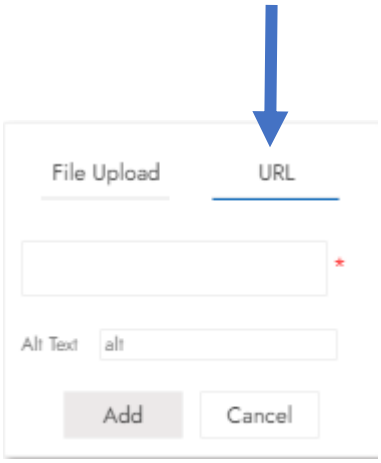
1. Place the cursor on the line you would like the image
2. Click the *Picture Upload* button in the toolbar



3. Select the source of your picture, “URL”
    - To upload a GIF from a URL, make sure the “URL” option is selected. (Has a blue line under it)



4. Add the URL of the GIF to be added

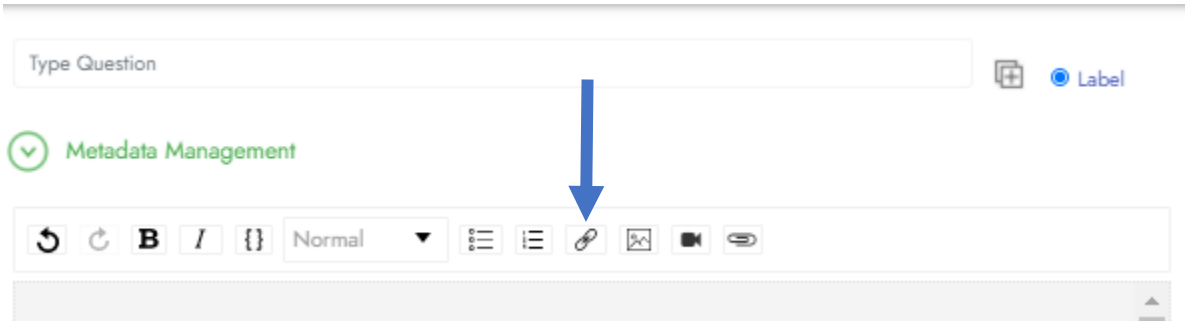


5. Click **Add**

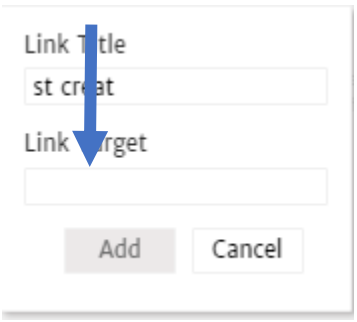
Adding a Hyperlink

To add a hyperlink to a dialogue:

1. Place the cursor on the line you would like the hyperlink
2. Type your display text
3. Select your display text
4. Click *Add Link* button in the toolbar



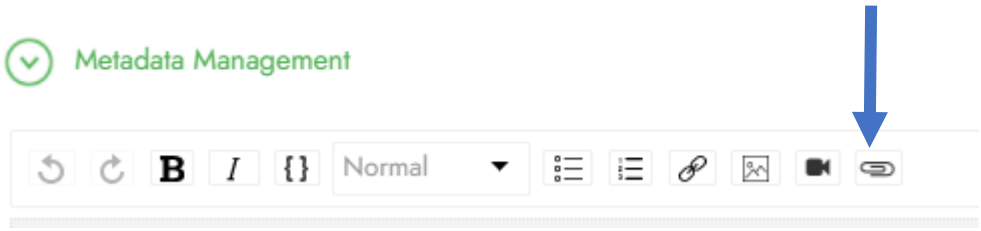
5. Enter the URL in the Link Target box



6. Click **Add**

Adding an Attachment

1. Place the cursor on the line you would like the image
2. Click the *Attachment Upload* button in the toolbar

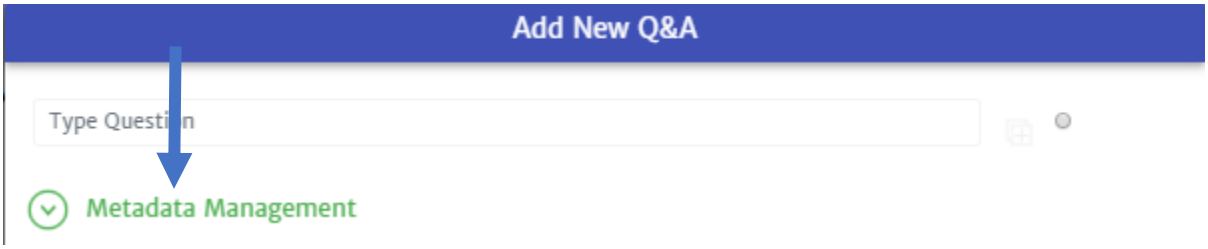


3. Select the file you would like to attach
4. Complete the reset of your response
5. Click **Update** when done

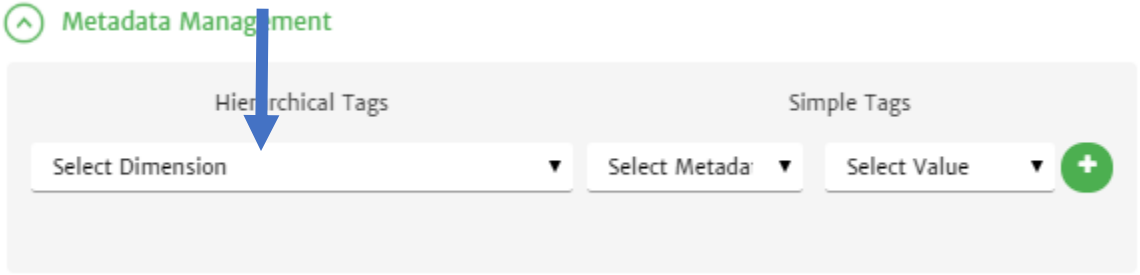
Adding Hierarchical and Simple Tags

To add the tags you created:

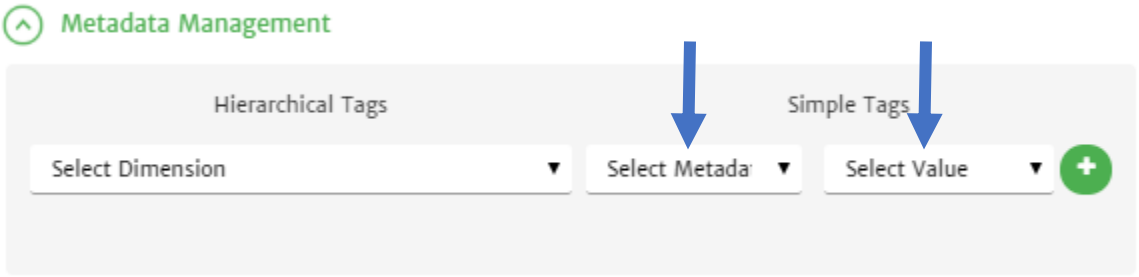
1. Click on **Metadata Management**



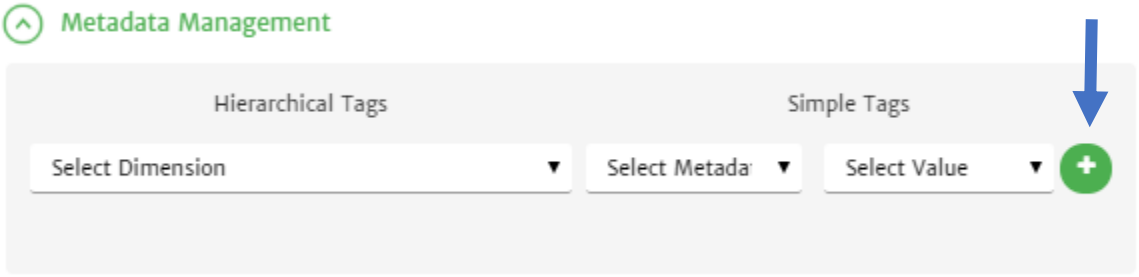
2. If you would like to add a Hierarchical Tag, under *Hierarchical Tag* click **Select Dimension**
3. Select the relevant tags for the various levels created.
    - You will have to select for the previous level before getting access to the next. Meaning you will have to select a tag for Level 1 before you get the available options for Level 2 and so on.



4. If you would like to add a Simple Tags, click **Select Metadate** to select the relevant tag and then click Select Value to select the relevant tag (if any).



5. Click the icon of a **+** in the green circle to add the Simple tag

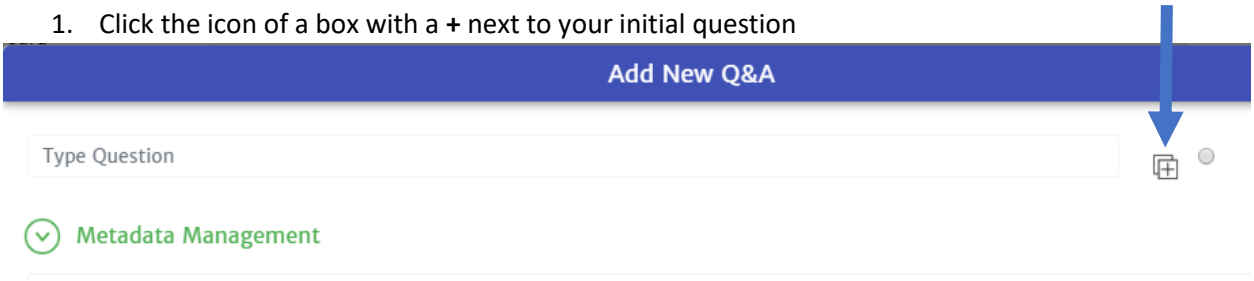


6. When you are done modifying the dialogue, click **Save**

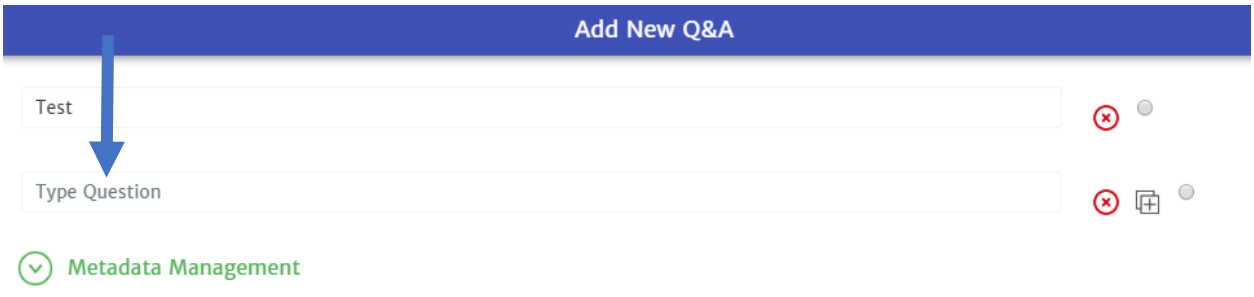
*Adding Simple Dialogue **Utterance** Variants*

There are multiple ways a user may ask the same question. Due to this, it is possible to create possible alternative questions (*utterance variant*) related to a specific dialogue.

1. Click the icon of a box with a **+** next to your initial question

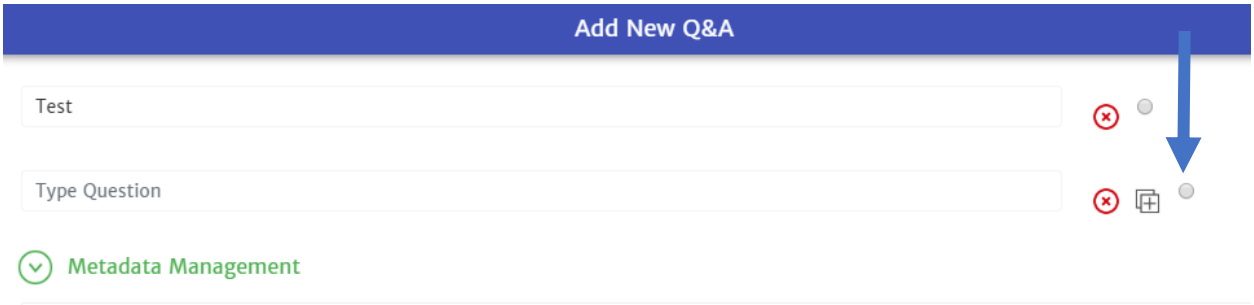


2. Type your question variant in the *Type question* box that appears



3. To set which variant to display in the bot to trigger this dialogue, click the radio button of the one you want.

   This will become the *label* for this particular dialogue.

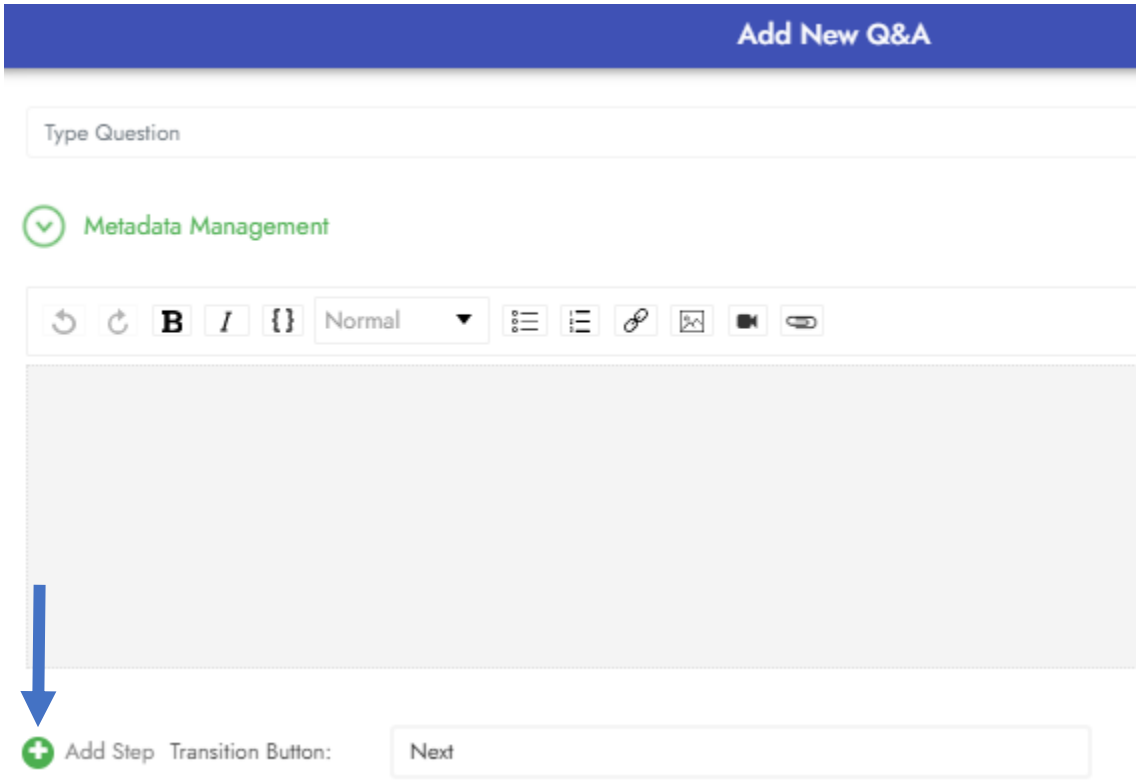


Multi-step Answers

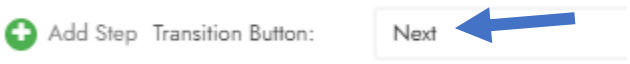
In Manage Q&A you can create multi-step answers to break up answers to make it easier for users to read. This is especially useful when there is a long list of troubleshooting steps needed to be completed.

Creating a Multi-Step Answer

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Click on **+** next to *ADD A NEW Q&A*
4. Enter your Q&A label and question variant (if any)
5. Write step 1 in the response box
6. Click on **+** next to *Add Step*



7. By default the *Transition Button* you will get between steps is *Next.* You can change this by highlighting *Next* and writing whatever you would like it to be.



8. A new Text Editor box will open below *Step 1*
9. Write your *Step 2*
10. Continue adding steps until your response is complete

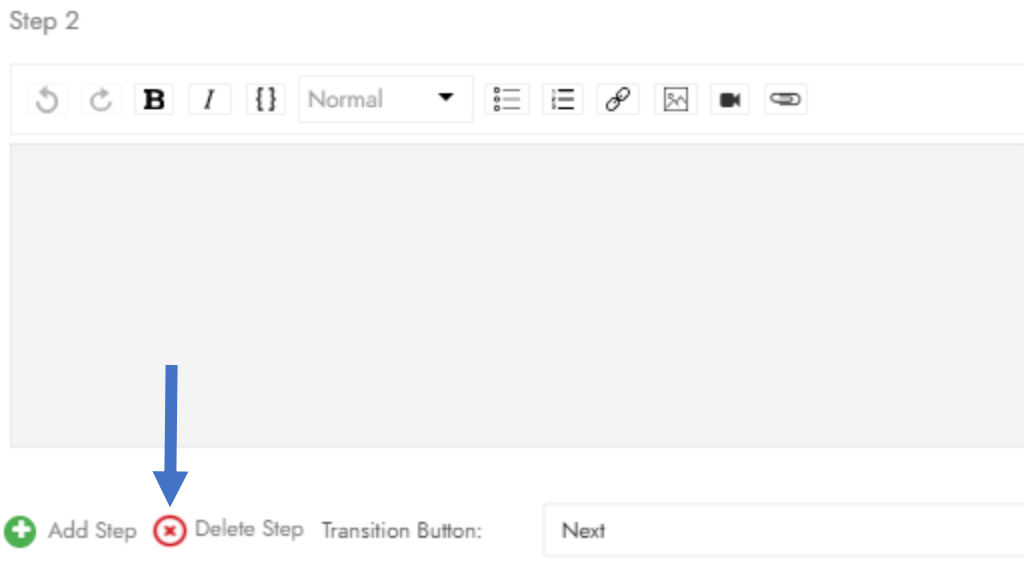
Note: Do not forget to change the *Transition Button* after your last step to something like "Done" or "Completed".

11. When you are done click **Save**

Note: You can change any of your current responses to Multi-step answers by following steps 5-11 after opening it for editing.

Deleting a Step

1. Go to the step you would like to delete
2. Scroll down to the *Add Step* button right under that specific response box
3. Click on **X** next to *Delete Step*


Step 2
Normal
Add Step
Delete Step
Transition Button:
Next

Using Generic Task

Actionable Science has the ability to enable generic flows for you to add to your Manage Q&A dialogues. They can be added to new or existing Manage Q&A dialogues. These flows are processes that you will use repeatedly in your bot. Meaning you will require the bot to perform the same steps over multiple dialogues.

Currently, we have pre-created a generic "Create a Ticket" and "Create a Ticket with Approval" flows. These can be customized with your basic ticket requirements, for example:

- Gather the following information
  - Contact Number
  - Details of Issue/Query
  - Email
- Route Ticket to the HelpDesk assignment group

If you would like to enable this feature and/or to discuss customization, please contact your Actionable Science point of contact.

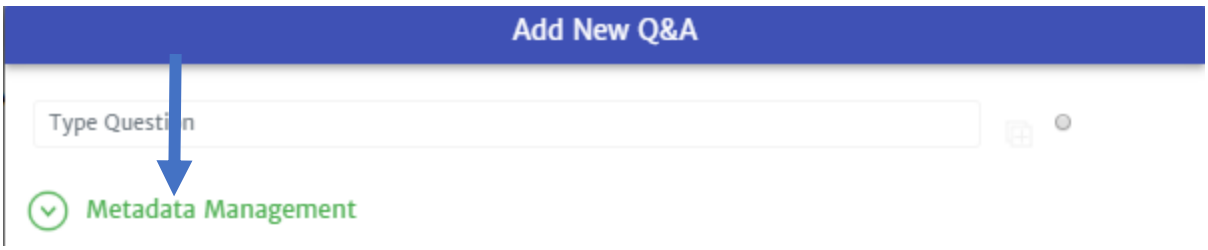
Adding a Generic Task to a Manage Q&A Dialogue

Adding to a New Q&A

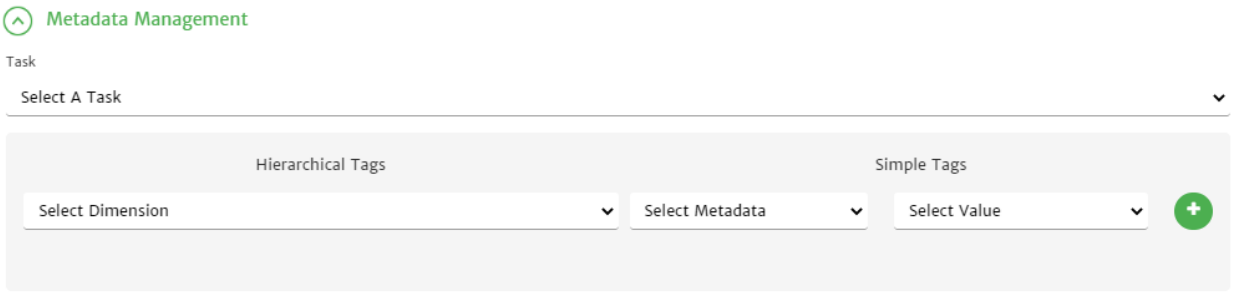
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Click on **+** next to *ADD A NEW Q&A*
4. Enter your Q&A label and question variant (if any)
5. Write your response

   NOTE: End your response with something to let a user know that a ticket creation is required and we need more details i.e. "This will require follow up with the creation of a ticket."

6. Click on **Metadata Management**



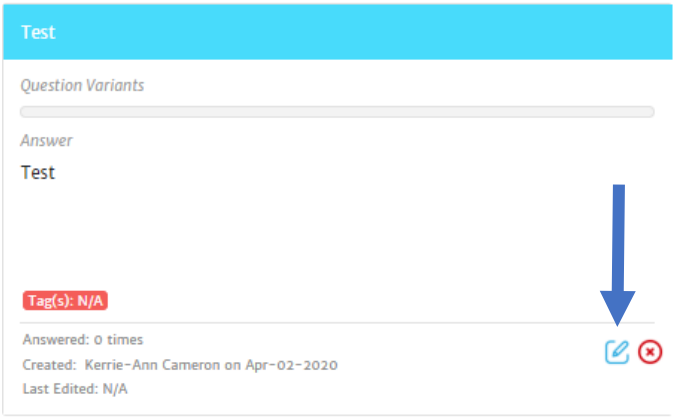
7. Under Task, click on **Select A Task**



8. Choose your Task from the dropdown menu
9. Click **Save**

Adding to an Existing Q&A

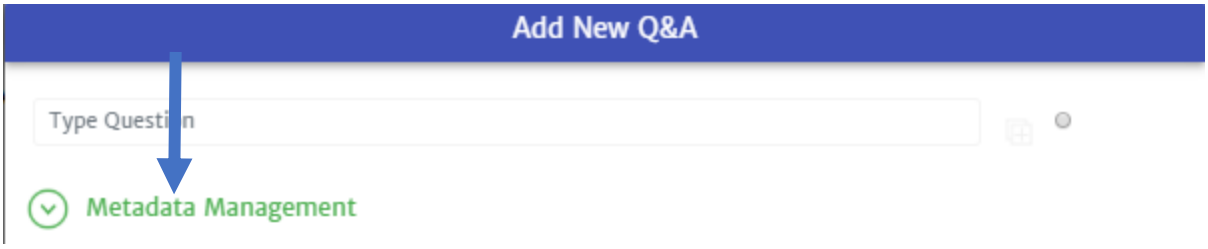
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Find the specific dialogue you would like to Edit (For more information, read *Finding a Specific Simple Dialogue*)
4. Click on the icon that looks like a pencil, too open the Text Editor and make changes.



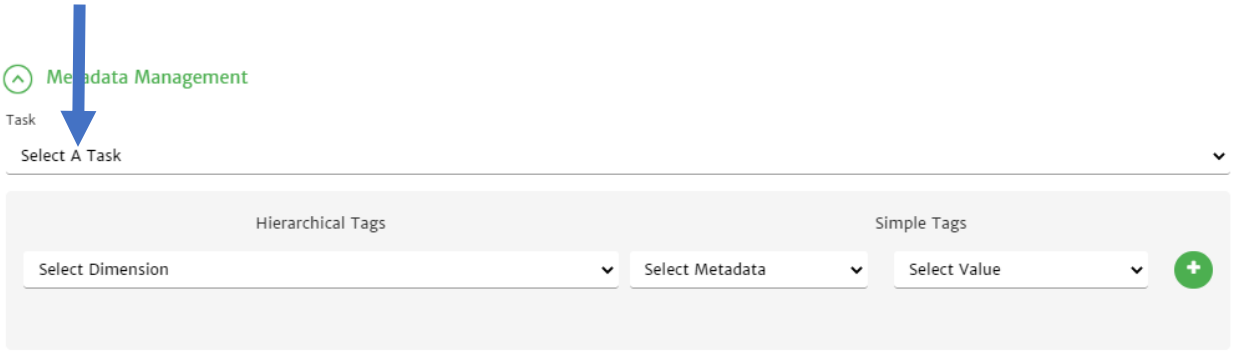
5. Edit the current response if necessary

   NOTE: End your response with something to let a user know that a ticket creation is required and we need more details i.e. “This will require follow up with the creation of a ticket.”

6. Click on **Metadata Management**



7. Under Task, click on **Select A Task**

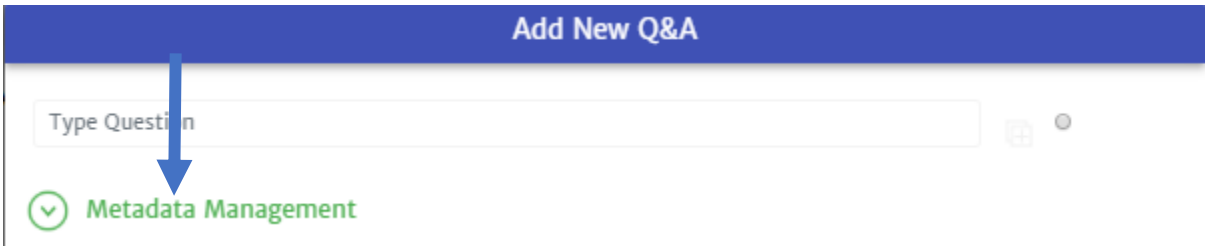


8. Choose your Task from the dropdown menu
9. Click **Update**

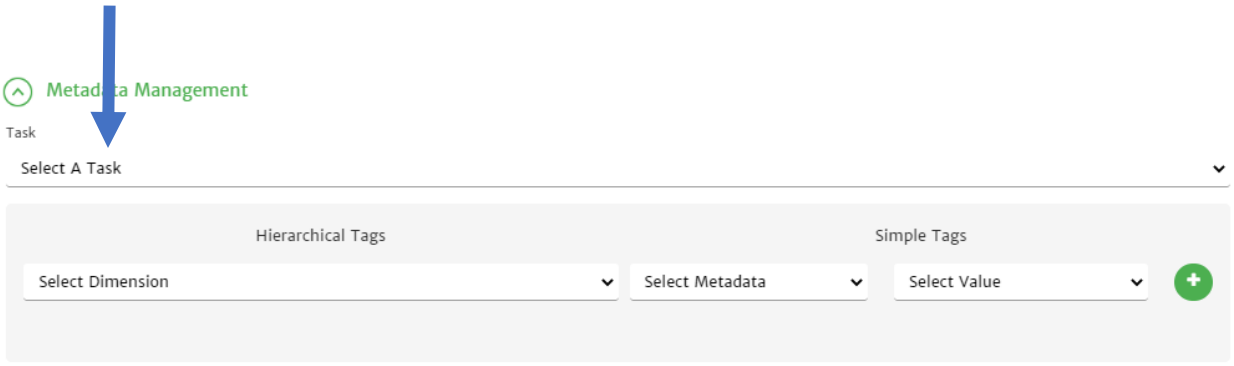
Deleting a Generic Task from a Manage Q&A Dialogue

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Find the specific dialogue you would like to Edit (For more information, read *Finding a Specific Simple Dialogue*)
4. Click on the icon that looks like a pencil, too open the Text Editor and make changes.

5. Click on **Metadata Management**



6. Under Task, click on the currently assigned Task name



7. Choose **Select A Task** from the dropdown menu
8. Click **Update**

Editing Simple Dialogues

Modifying an Existing Dialogue

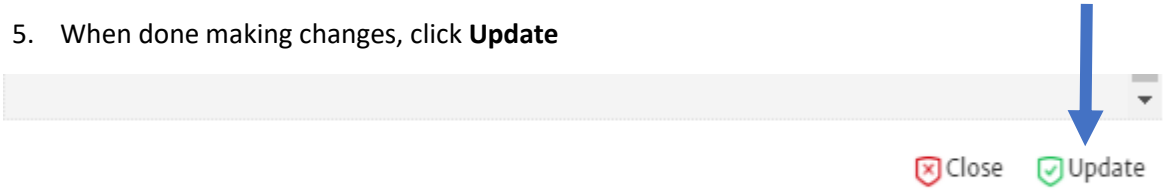
To change any of the dialogues you have created:

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Find the specific dialogue you would like to Edit (For more information, read *Finding a Specific Simple Dialogue*)
4. Click on the icon that looks like a pencil, too open the Text Editor and make changes.

NOTES:

- For how to remove an image refer to Removing Pictures.
- For how to remove videos refer to
- Removing Videos. For how to remove a hyperlink refer to Removing Hyperlinks.
- You can change any of your current responses to Multi-step answers by following steps 5-11 of Creating a Multi-Step Answer after opening it for editing.

5. When done making changes, click **Update**



Removing Pictures

To remove an image, place the cursor before or after the image and click on the delete or backspace button on your keyboard.

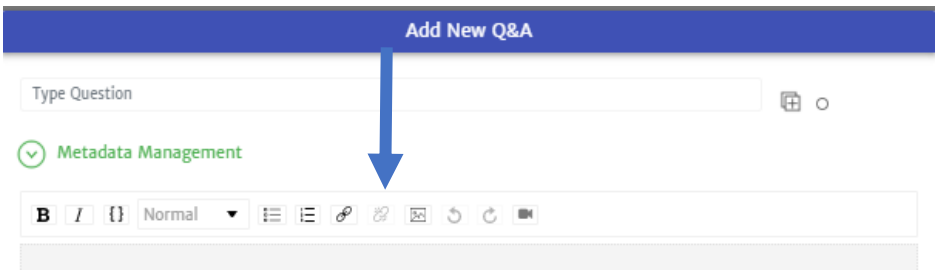
Removing Videos

To remove a video, place the cursor before or after the video and click on the delete or backspace button on your keyboard.

Remove Hyperlinks

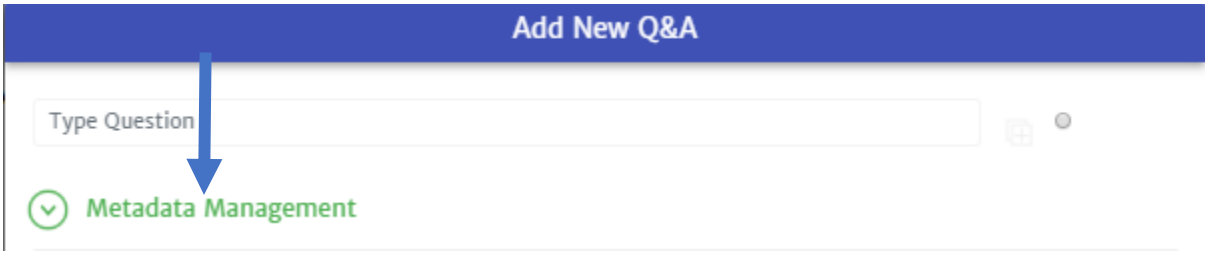
To remove a hyperlink you have two options:

- Remove the link and text - Select the link with your mouse and click delete or backspace on your keyboard.
- Remove the link but keep the text - Select the link with your mouse and click the remove link icon in the formate bar

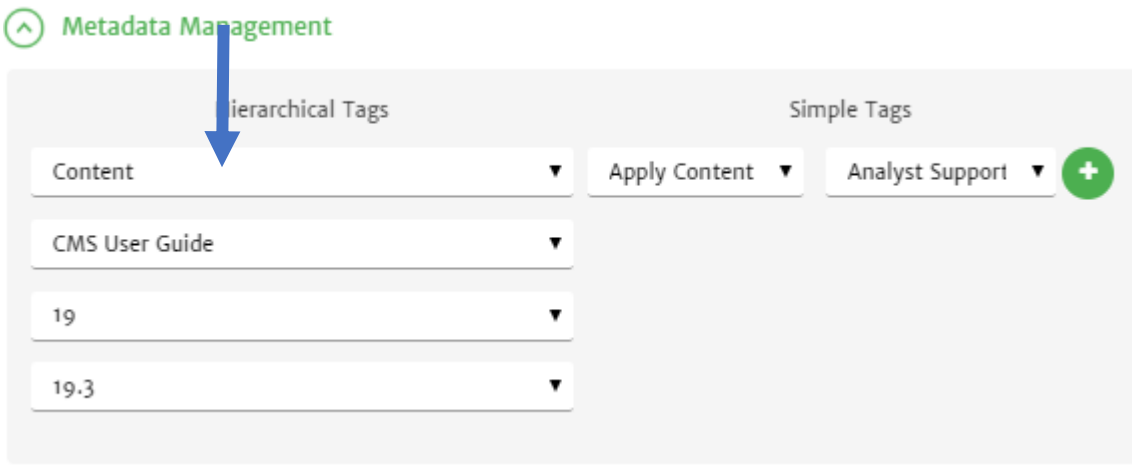


Deleting Hierarchical and Simple Tags

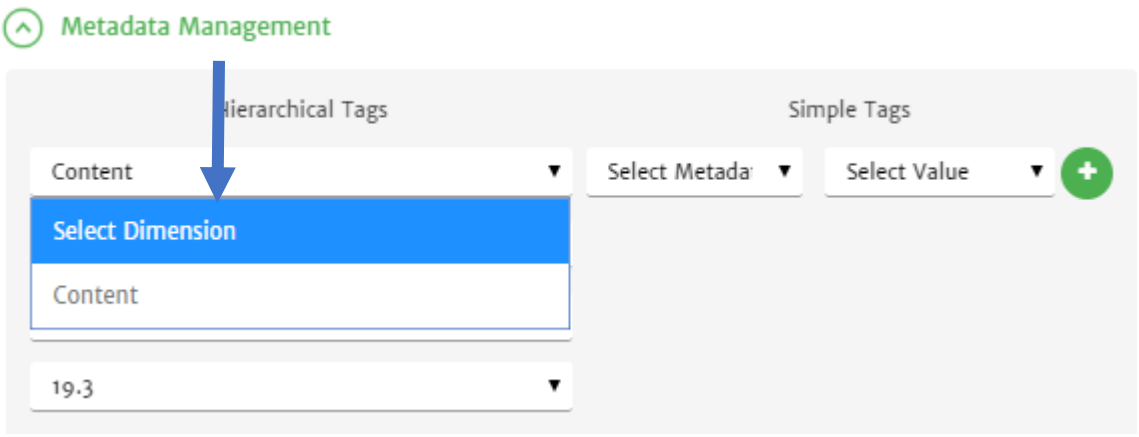
1. Click on **Metadata Management**



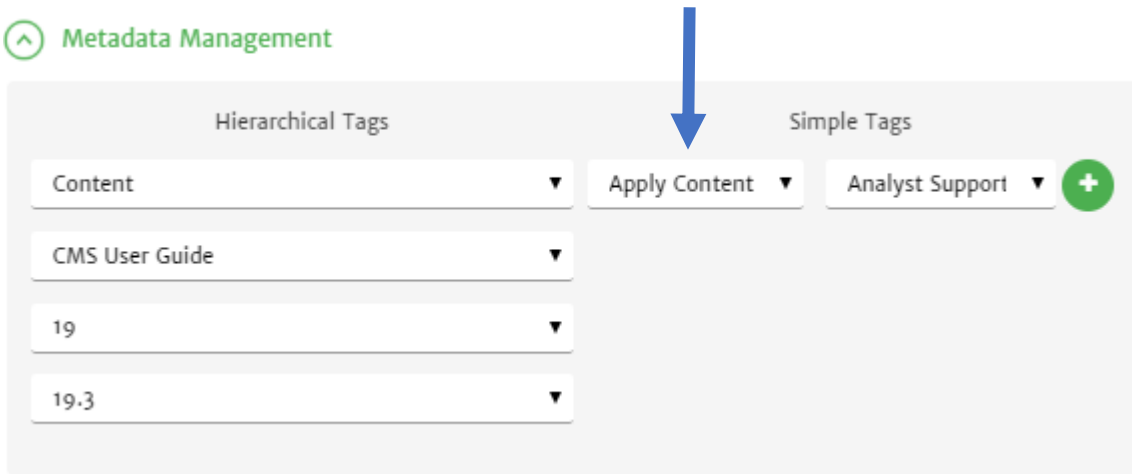
2. If you would like to remove a Hierarchical Tag, under *Hierarchical Tag* click the *Label for Level 1*



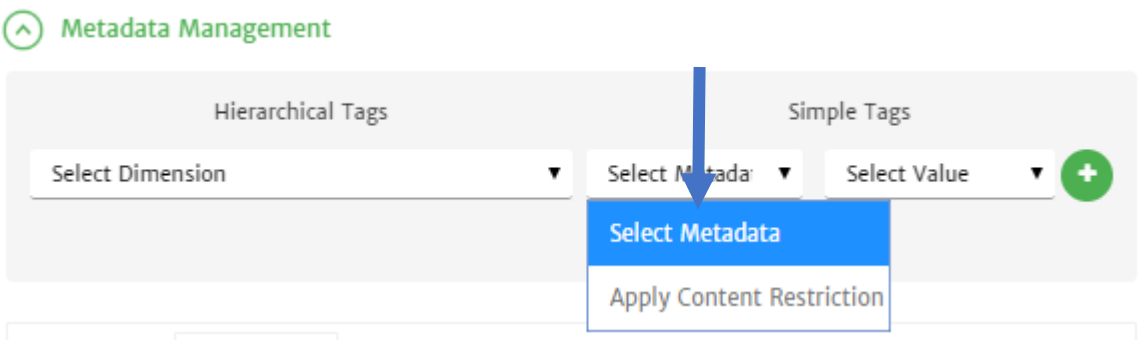
3. Click **Select Dimension**



4. If you would like to remove a Simple Tags, under *Simple Tags* click your created Simple tag in the first box



5. Click **Select Metadate**



Modifying Metadata and Simple Tags

To modify any of your Hierarchical or Simple Tag:

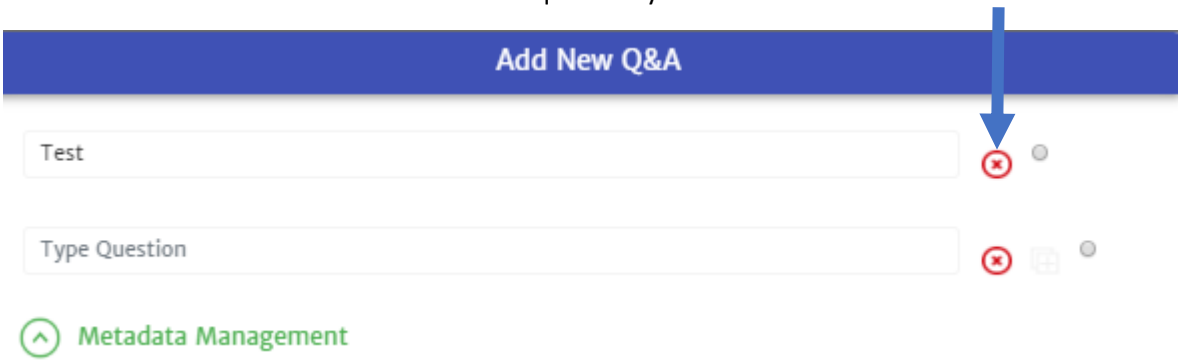
1. Click on the tag you would click to change
2. Select a new tag

NOTE: If you change a higher level tag all subsequent tags will be removed. This means if you change your level 1 tag, you will have to re-add your level 2 etc.

Delete Question Variants

To delete any of your question variants (including the initial one you created when creating your dialogue):

1. Click on the **X** in a red circle next to the question you would like to delete



Delete Dialogue

To delete any of the dialogues created:

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Find the specific dialogue you would like to delete (For more information, read *Finding a Specific Simple Dialogue*)

4. Click on the **X** in a red circle

NOTE: You do not have to remove tags prior, to deleting the entire dialogue.

Finding a Specific Simple Dialogue

There are three ways to search/find a Simple Dialogue:

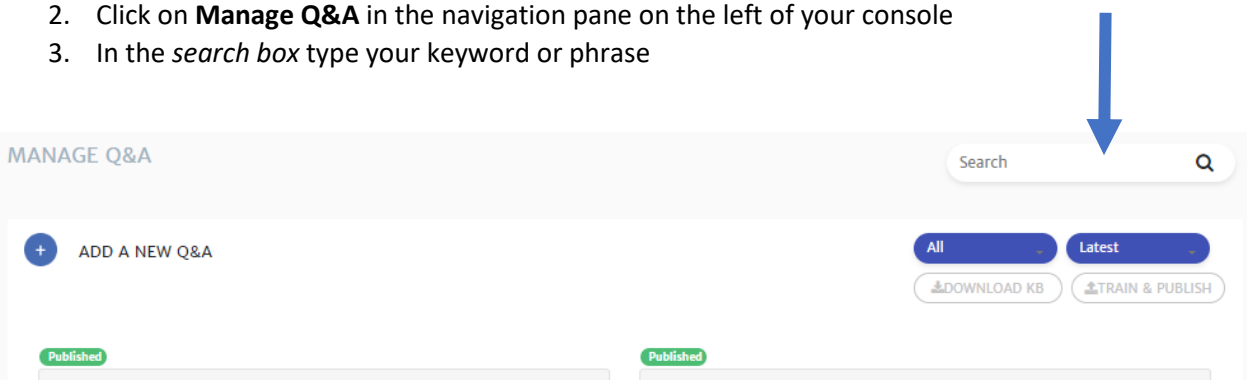
- Using keywords or phrases
- Tag Filter
- Using Other Filters

NOTES:

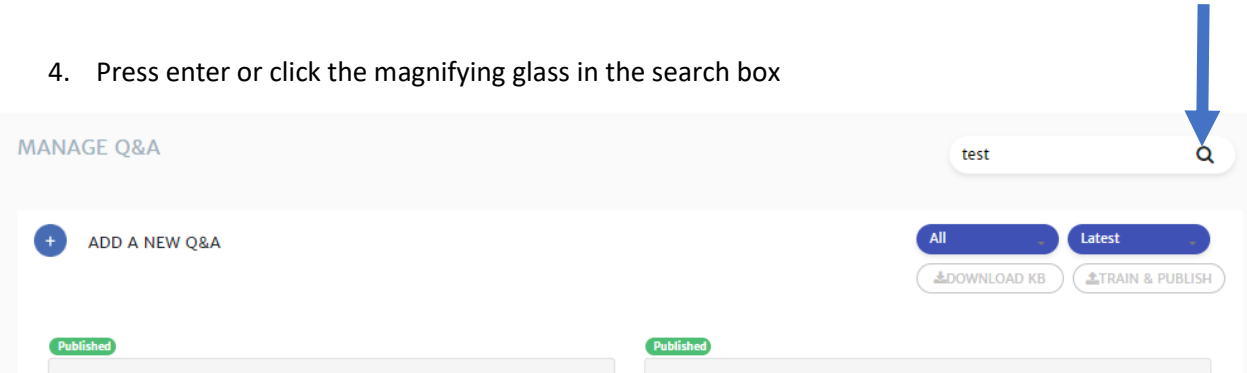
1. If there are no tags associated with your dialogue you will not see that additional filter.
2. Filters can be used in combination with word/phrase search.

Search using Keywords or Phrases

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. In the *search box* type your keyword or phrase



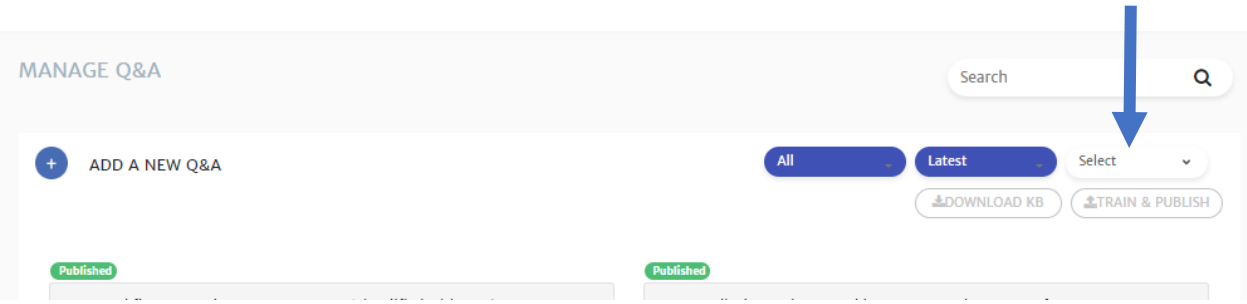
4. Press enter or click the magnifying glass in the search box



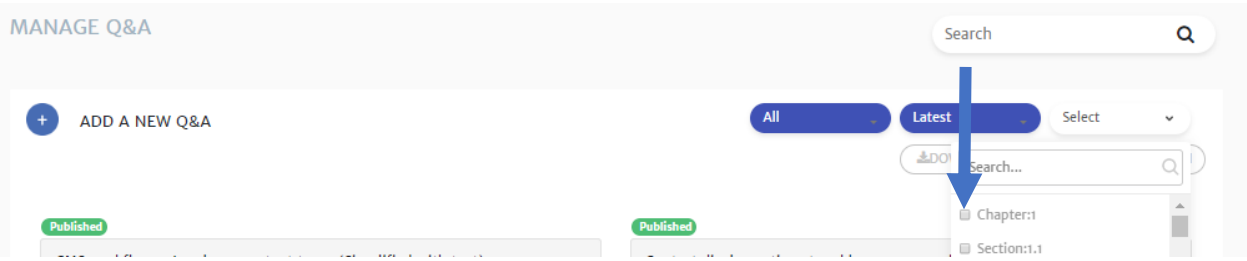
Search using the Tag Filter

NOTE: Filters can be used in combination with word/phrase search. They can be applied before or after.

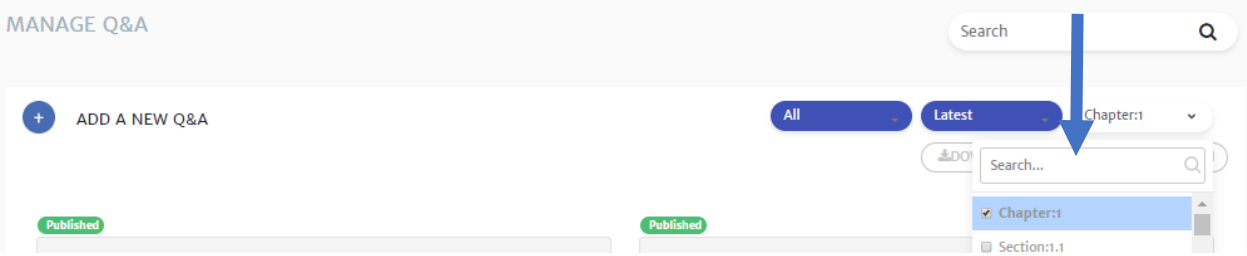
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console
3. Click on the Tag filter option



4. Scroll through the list for the tag or tags you would like to see and click on the box next to it



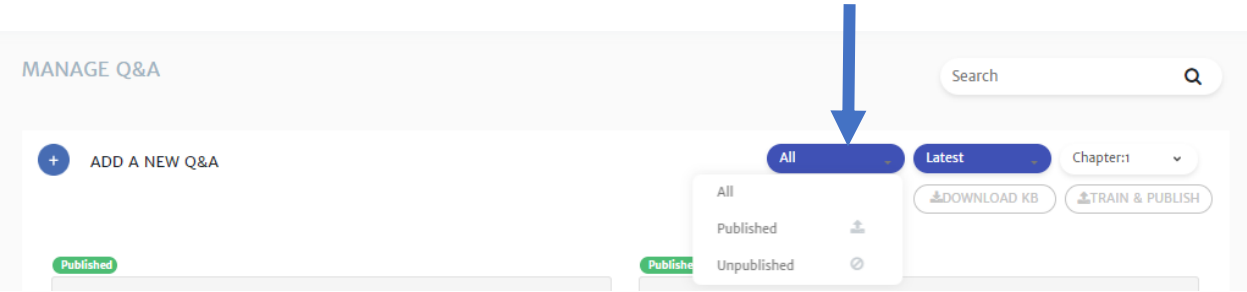
NOTE: You can also type the tag in the Search box and press enter or click the magnifying glass to complete.



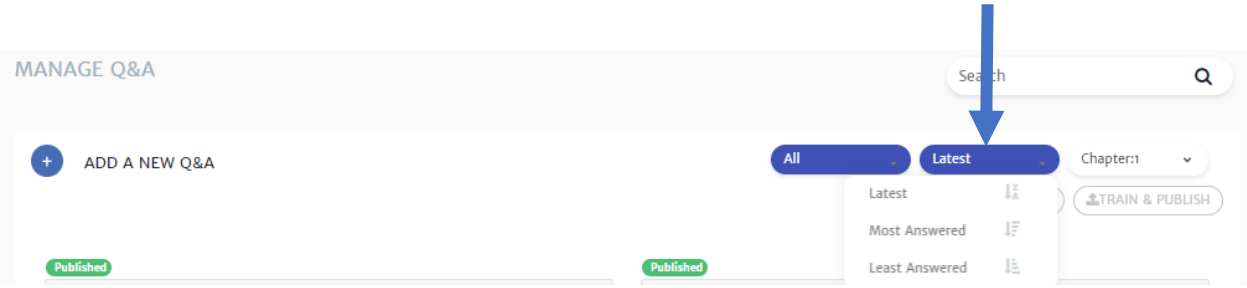
Using Other Filters

There are two other types of filters available:

- Publish status



- Latest, Most answered or Least answered



1. Select the filter you like
2. View the results

NOTE: Filters can be used in combination with word/phrase search. They can be applied before or after. You simply place your filters before or after searching your keyword/phrase. For more on keyword/phrase search refer to Search using Keywords or Phrases.

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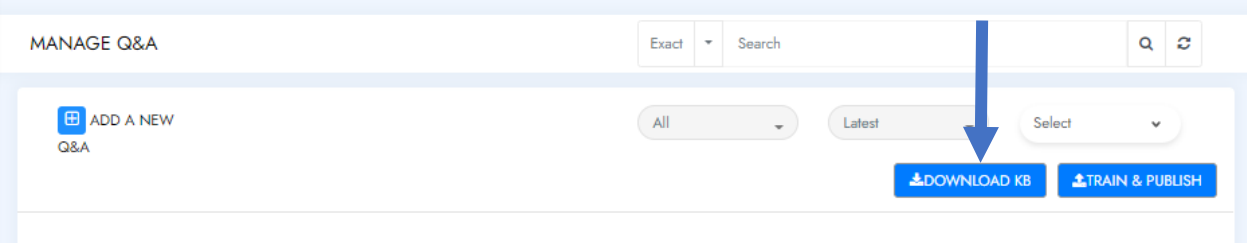
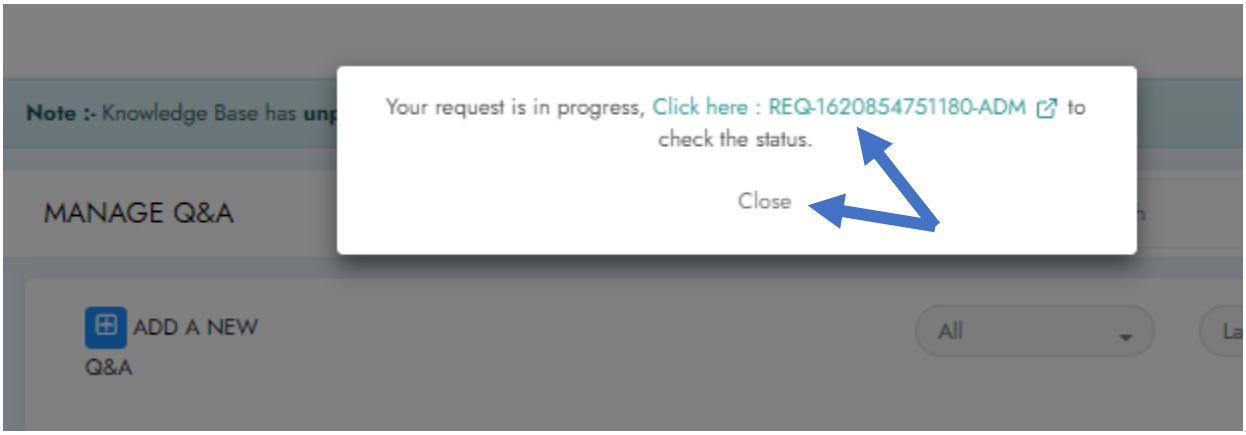
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Q&A** in the navigation pane on the left of your console

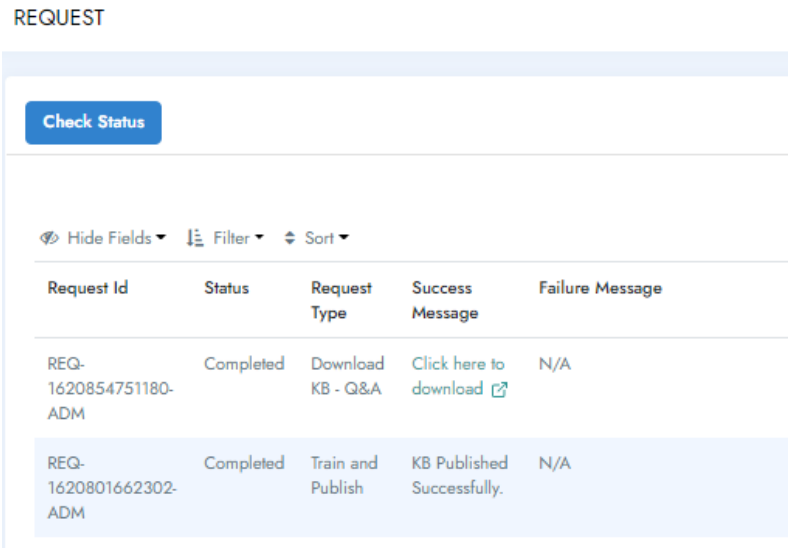
3. Click **Download KB**



4. You will get a prompt, advising you your request is in progress, you can click on the link in the prompt and skip to step 6 or click **Close** follow the next steps



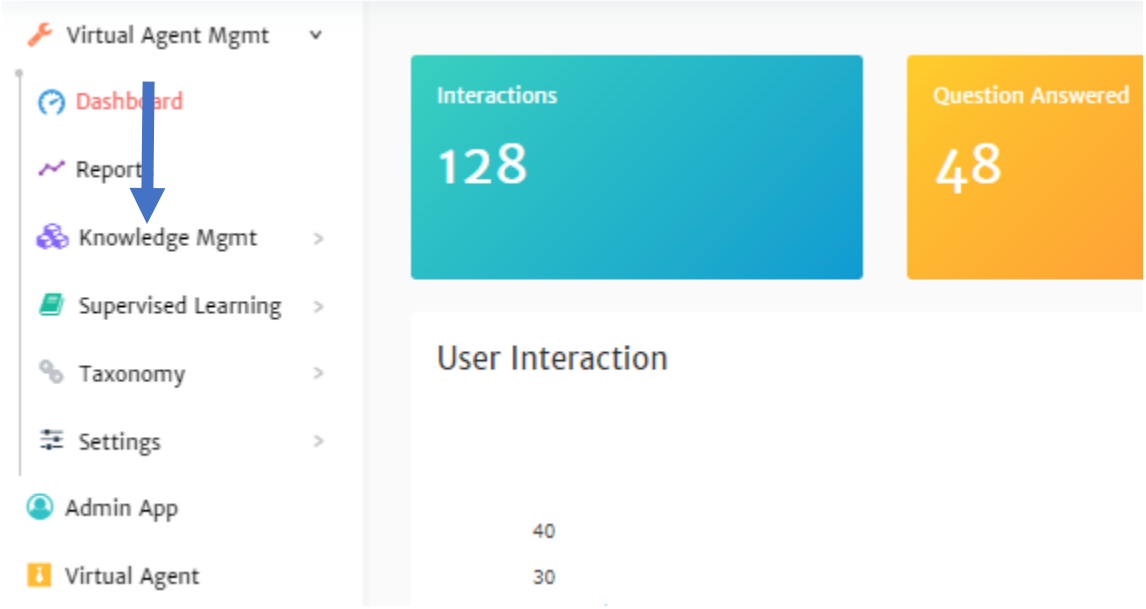
5. Click **Request** in the navigation pane on the left of your console
6. Look for your request in the list



7. If the status is *Completed,* under *Success Message* you will have a *Click here to download* option to click on. If the status is *In Progress*, click **Check Status** to get updated status and once *Completed* click on the *Click here to download* option.

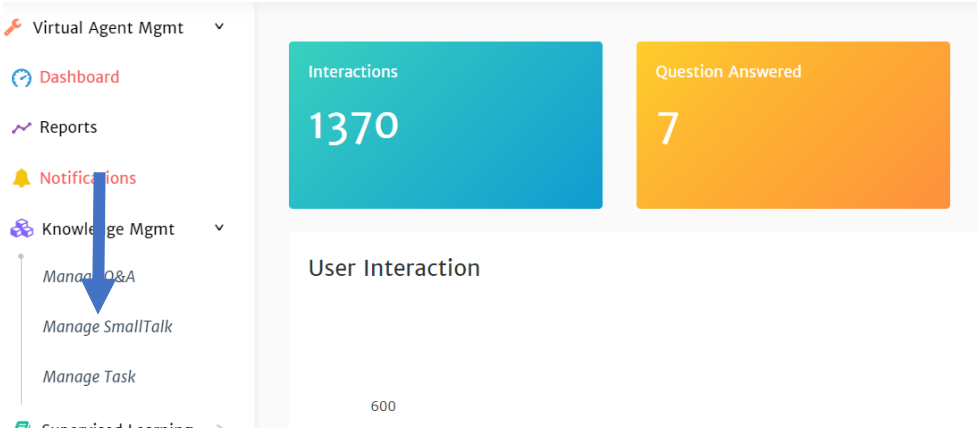
Manage SmallTalk

In **Manage SmallTalk**, you can add, edit and delete common phrases used while doing conversation with Virtual Agent. It can be found under the **Knowledge MGMT** section.

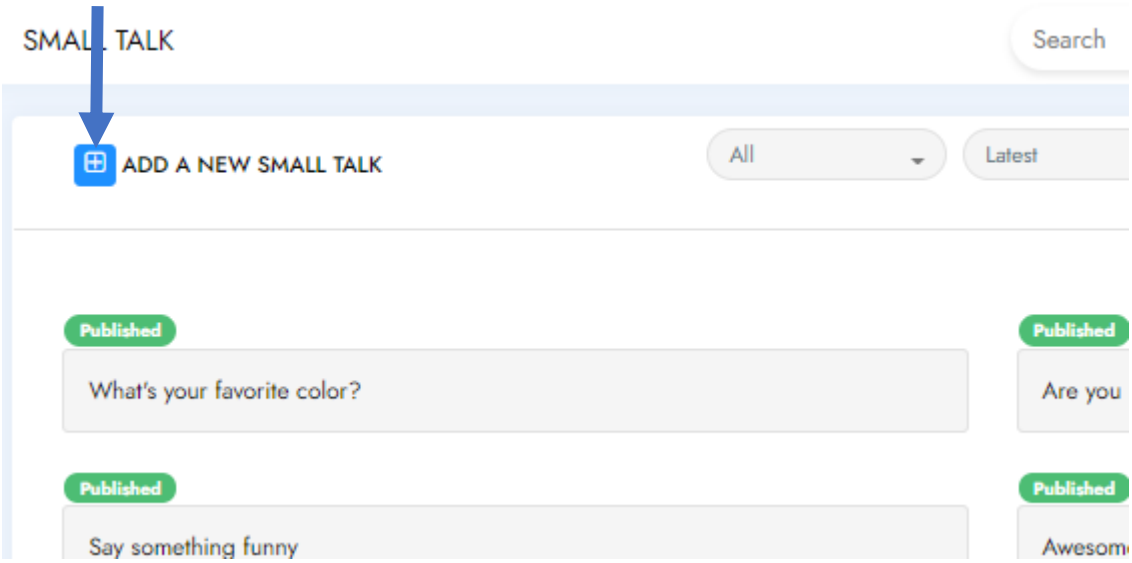


Creating SmallTalk

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage SmallTalk** in the navigation pane on the left of your console



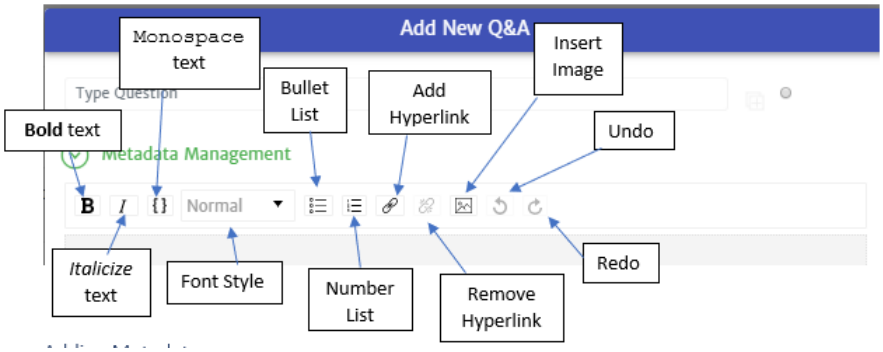
3. Click **+** next to *ADD A NEW SMALL TALK*



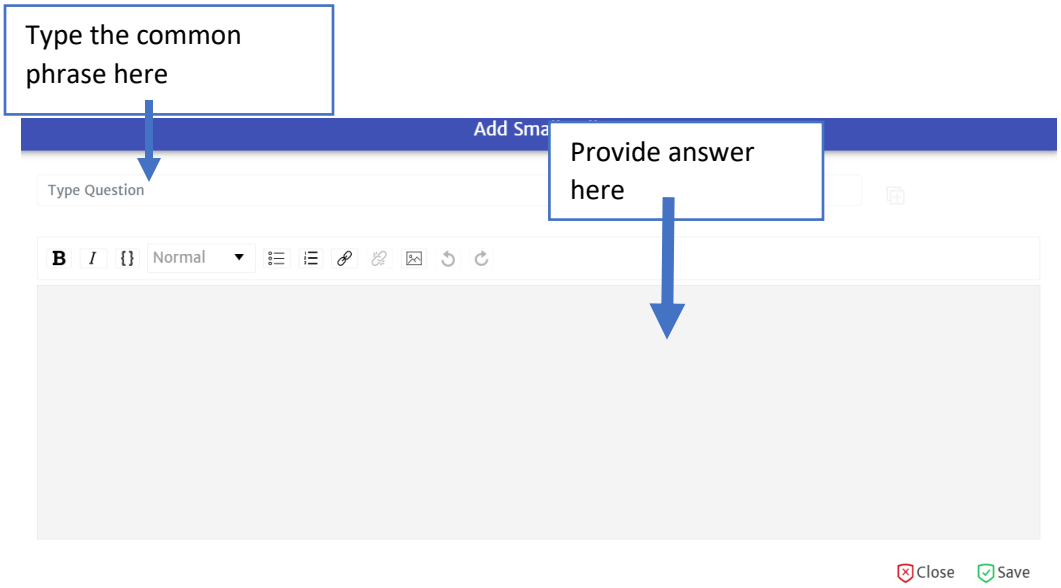
4. Type the phrase and response

NOTES:

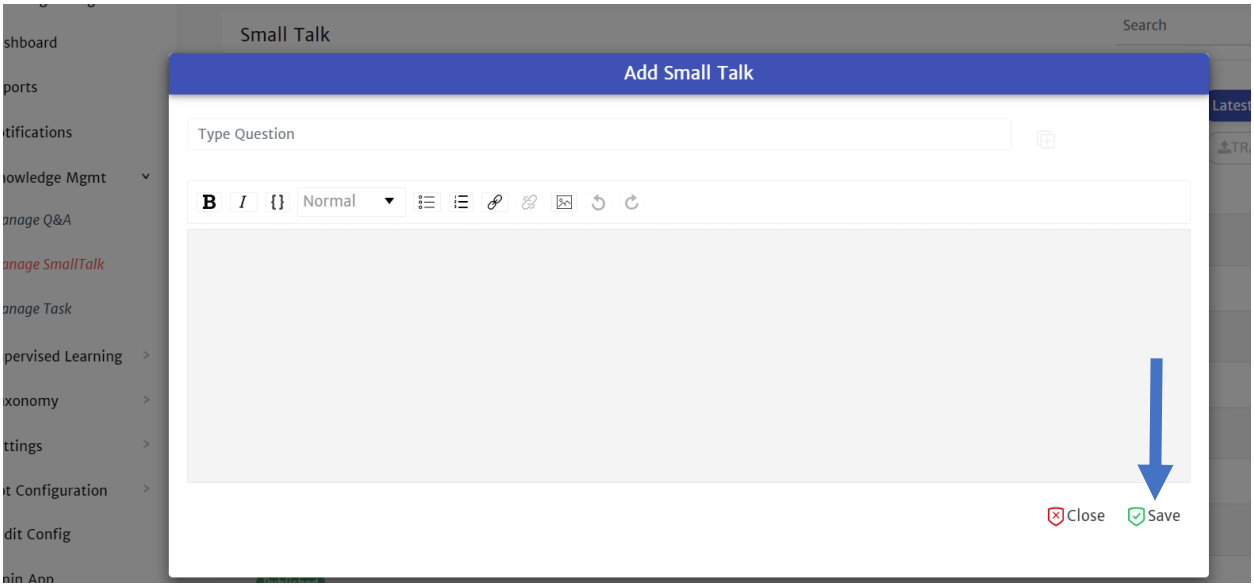
- Small Talk has the same text editor toolbar as Manage Q&A.



- Unlike other dialogues, small talk needs to be an exact match to what the user asks. You may need to add a variant. For more information, read Adding SmallTalk Variants.



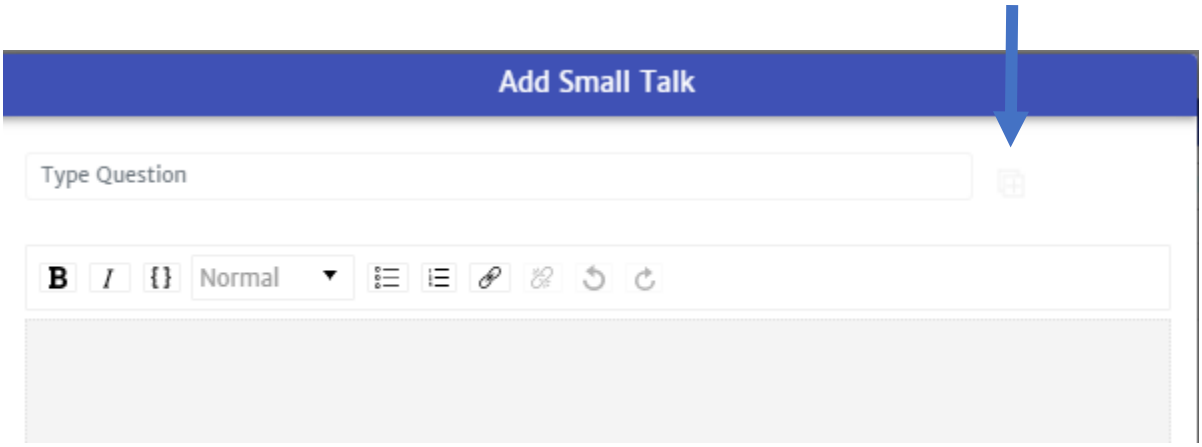
5. Click on **Save**



Adding SmallTalk **Utterances** Variants

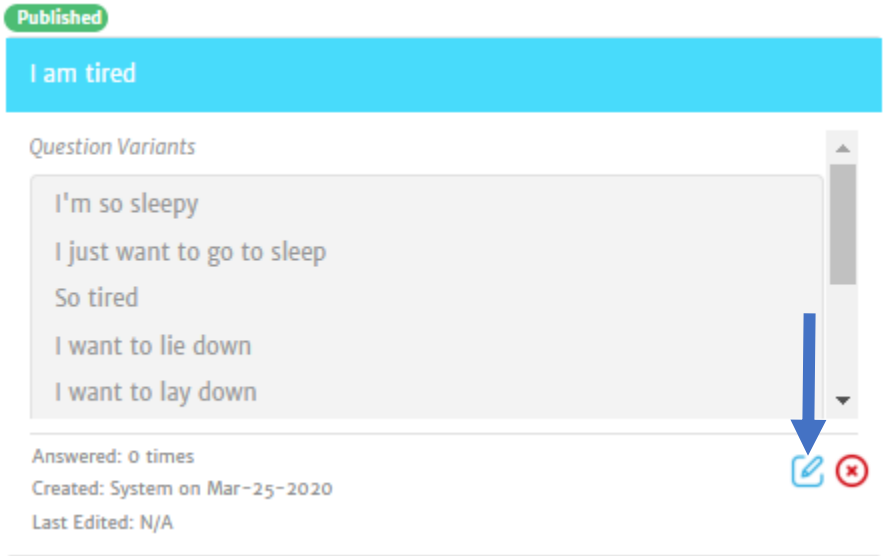
There are multiple ways a user may ask the same phrase. Due to this, it is possible to create possible alternative phrases (*utterance variant*) related to a specific response.

1. Click the icon of a box with a **+** next to your initial question
2. Type your SmallTalk variant in the *Type question* box that appears



Editing SmallTalk Dialogues

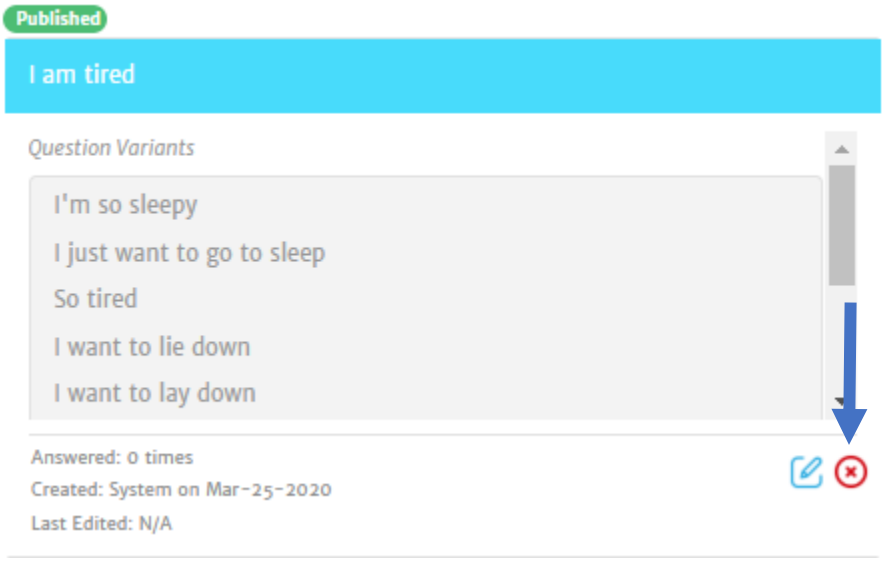
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage SmallTalk** in the navigation pane on the left of your console
3. Find the specific phrase and response you would like to Edit (For more information, read *Finding a Specific SmallTalk*)
4. Click on the icon that looks like a pencil, too open the Text Editor and make changes.



Deleting SmallTalk Dialogues

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage SmallTalk** in the navigation pane on the left of your console

3. Find the specific phrase and response you would like to Edit (For more information, read *Finding a Specific SmallTalk*)
4. Click on the **X** in a red circle



Finding a Specific SmallTalk

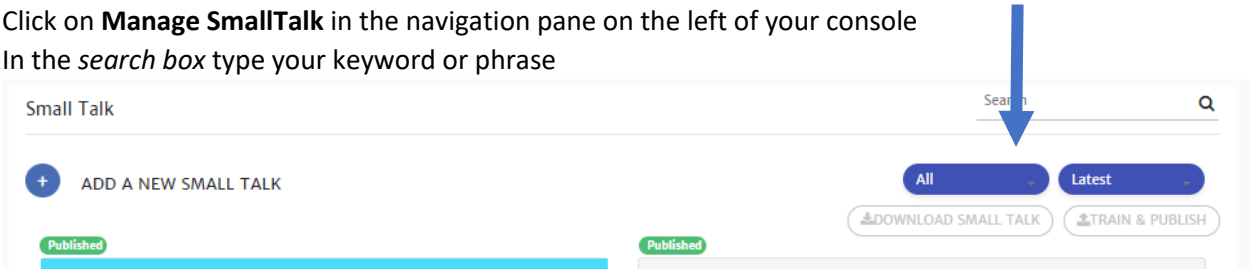
There are two ways to search/find a SmallTalk:

- Using keywords or phrases
- Using Filters

NOTE: Filters can be used in combination with word/phrase search.

Search using Keywords or Phrases

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage SmallTalk** in the navigation pane on the left of your console
3. In the *search box* type your keyword or phrase

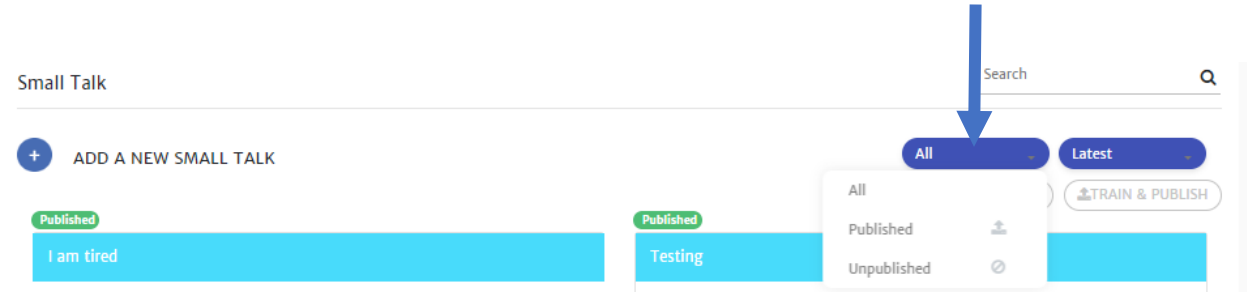


4. Press enter or click the magnifying glass in the search box

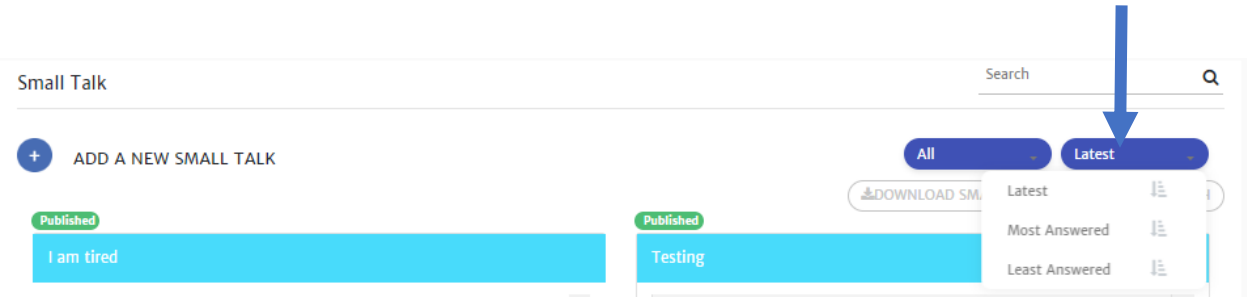
Search Using Filters

There are two other types of filters available:

- Publish status



- Latest, Most answered or Least answered



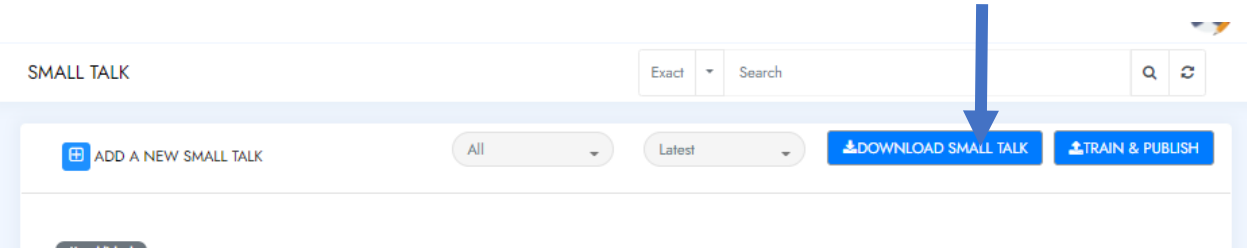
8. Select the filter you like
9. View the results

NOTE: Filters can be used in combination with word/phrase search. They can be applied before or after. You simply place your filters before or after searching your keyword/phrase. For more on keyword/phrase search refer to Search using Keywords or Phrases.

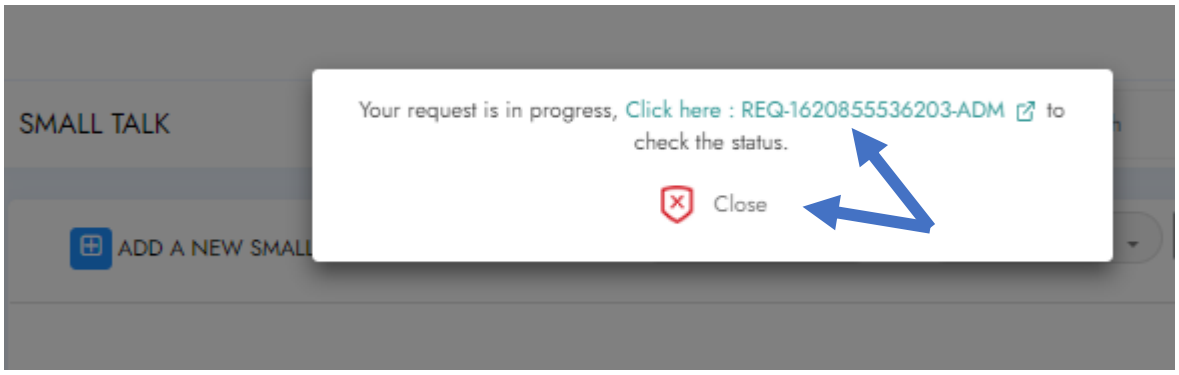
Download Excel Version of Small Talk

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console

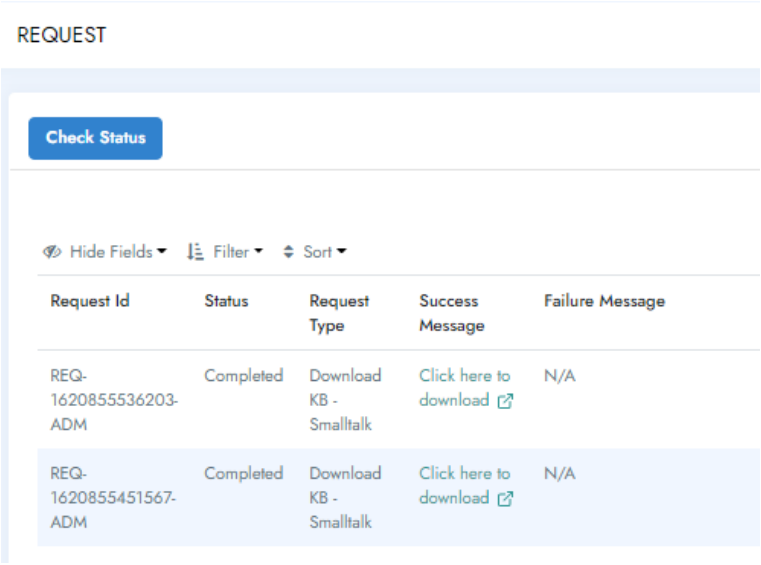
2. Click on **Manage SmallTalk** in the navigation pane on the left of your console
3. Click **Download Small Talk**



4. You will get a prompt, advising you your request is in progress, you can click on the link in the prompt and skip to step 6 or click **Close** follow the next steps



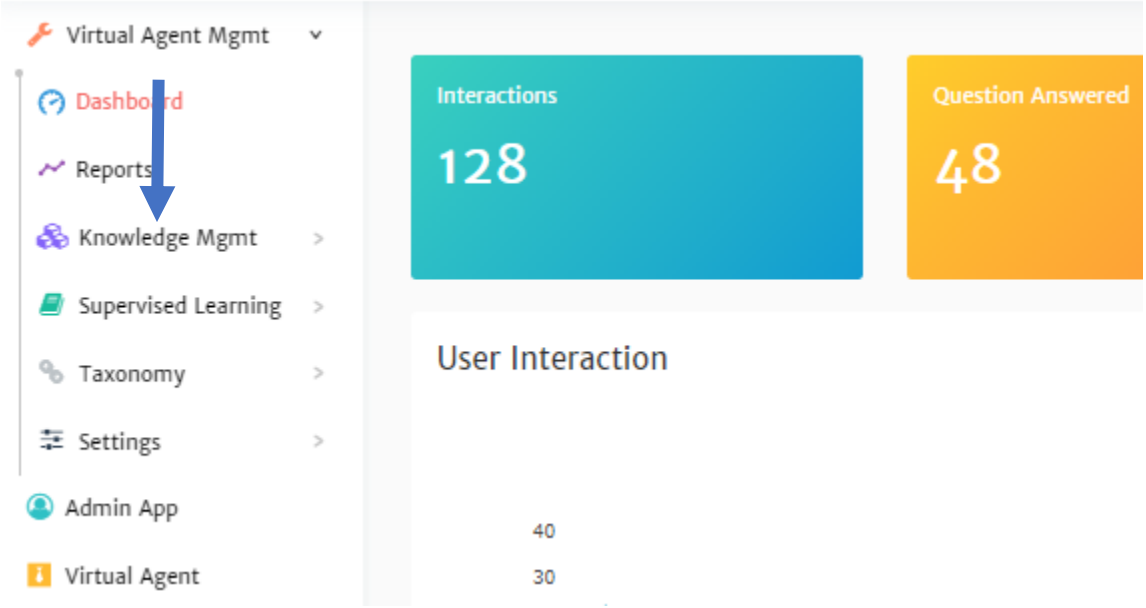
5. Click **Request** in the navigation pane on the left of your console
6. Look for your request in the list



7. If the status is *Completed,* under *Success Message* you will have a *Click here to download* option to click on. If the status is *In Progress*, click **Check Status** to get updated status and once *Completed* click on the *Click here to download* option.

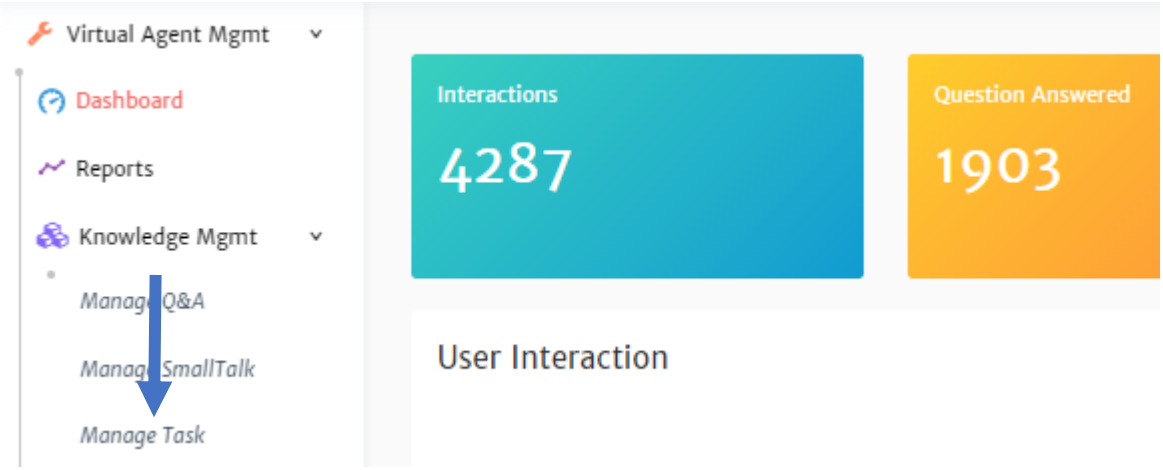
Manage Task

In **Manage Task**, you can add, edit and delete the utterances of complex dialogues. It can be found under the **Knowledge MGMT** section.



You might be asking yourself what is a “complex dialogue”. There are three types of Complex dialogues:

- Flows with Multiple Questions
    - Usually to gather information and paced to someone to action
- Complex Troubleshooting flow
    - An issue may require the user to confirm troubleshooting steps before providing an additional step
    - To confirm symptoms of their issue before providing the correct troubleshooting steps
- Combination of the two



Creating Complex Dialogues

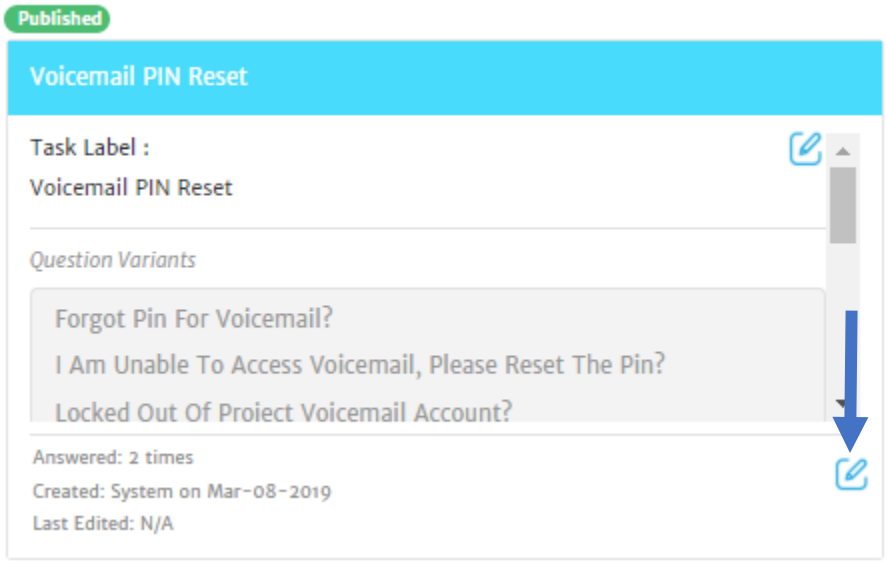
To create complex dialogues you need to build out the dialogue and create a flowchart.

Complex Dialogue Utterance Variants

Adding Complex Dialogue Utterance Variants

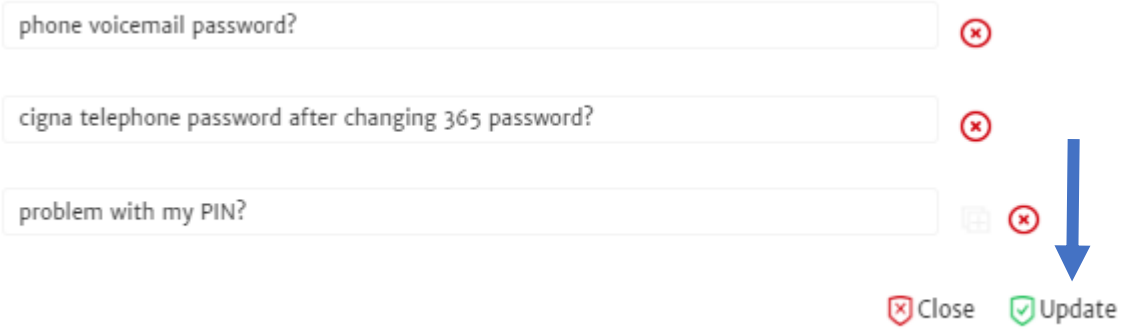
There are multiple ways a user may ask the same question. Due to this, it is possible to create alternative questions (*utterance variant*) related to a specific dialogue.

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Task** in the navigation pane on the left of your console
3. Find the specific phrase and response you would like to Edit (For more information, read *Finding a Specific Complex Dialogue*)
4. Click on the icon that looks like a pencil at the bottom of the box



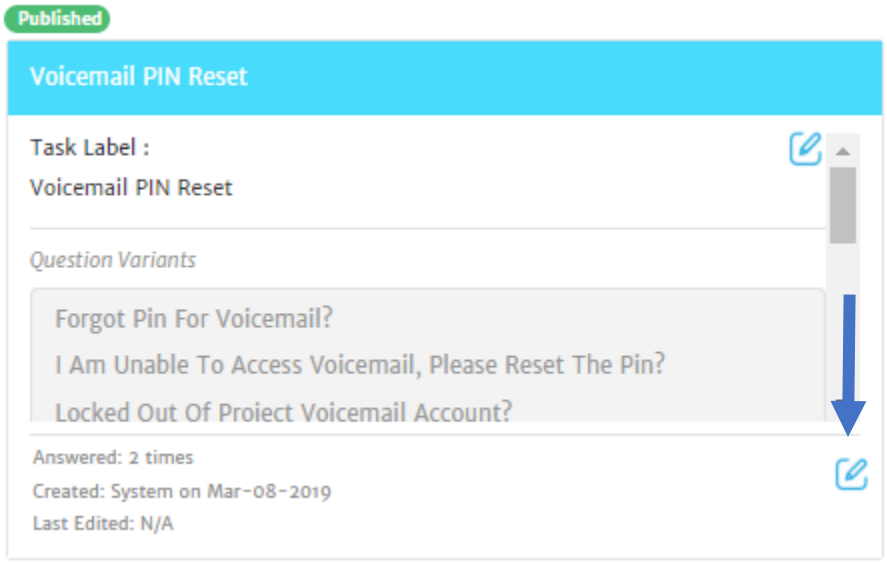
5. Click on the **+** icon, found next to the last utterance in the current list

6. Add your question variation
7. Click **Update** to save

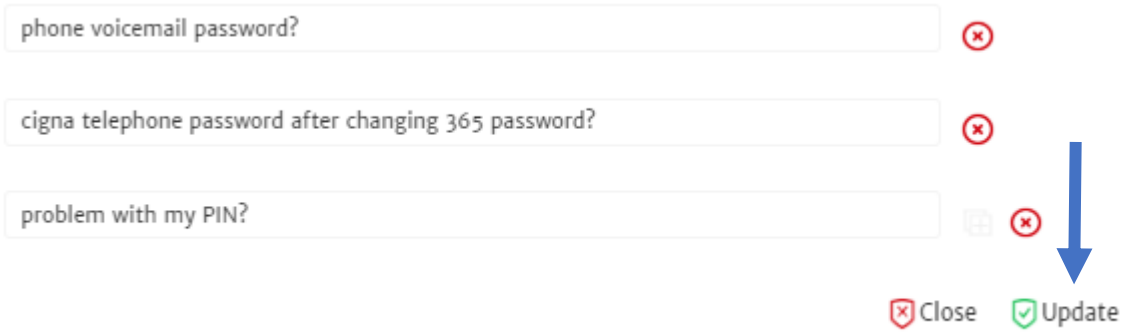


Editing Complex Dialogue Utterance Variants

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Task** in the navigation pane on the left of your console
3. Find the specific phrase and response you would like to Edit (For more information, read *Finding a Specific Complex Dialogue*)
4. Click on the icon that looks like a pencil at the bottom of the box

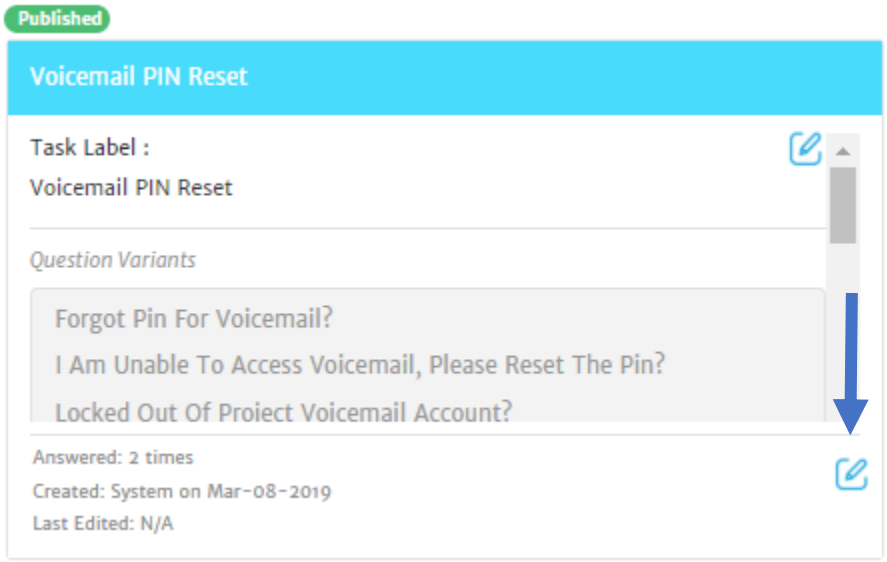


5. Find the utterance to be edited and make the required changes
6. Click **Update** to save

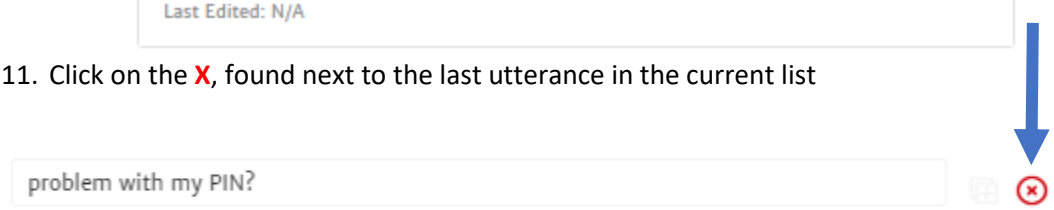


Deleting a Complex Dialogue Utterance Variants

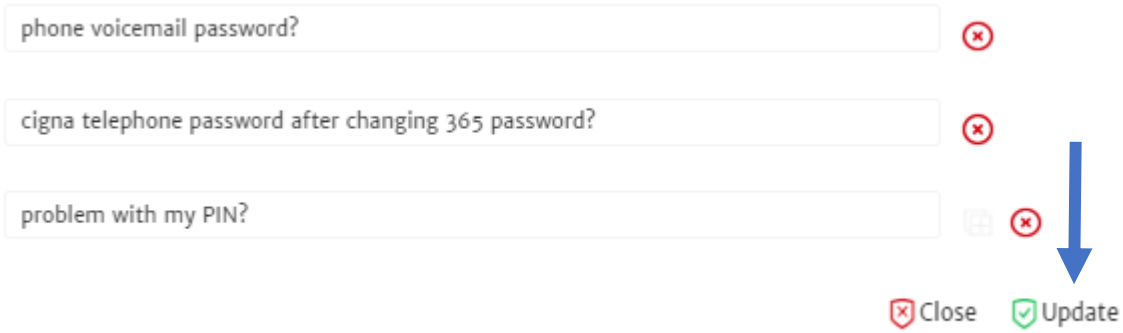
7. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
8. Click on **Manage Task** in the navigation pane on the left of your console
9. Find the specific phrase and response you would like to Edit (For more information, read *Finding a Specific Complex Dialogue*)
10. Click on the icon that looks like a pencil.



11. Click on the **X**, found next to the last utterance in the current list



12. Click **Update** to save



Finding a Specific Complex Dialogue

There are two ways to search/find a SmallTalk:

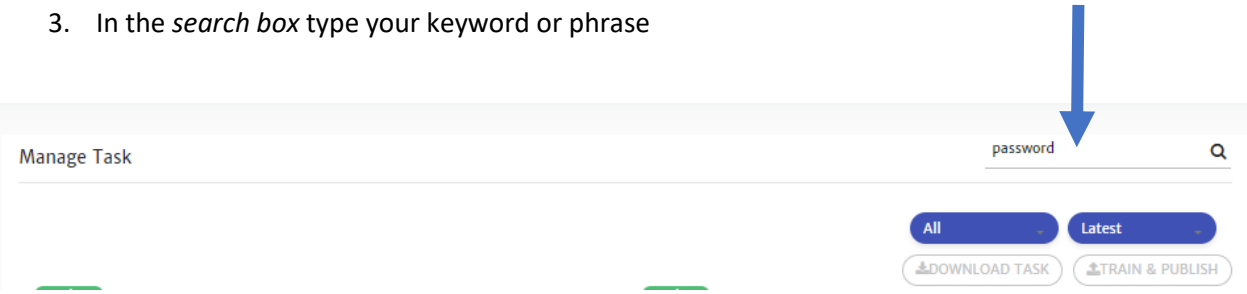
- Using keywords or phrases
- Using Filters

NOTE: Filters can be used in combination with word/phrase search.

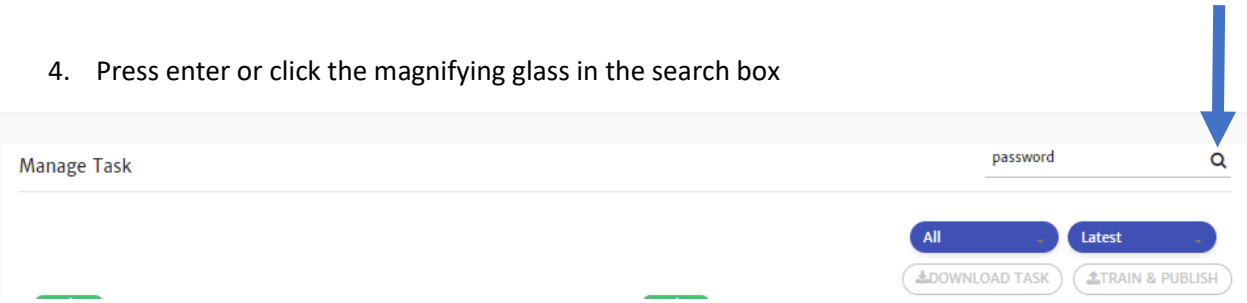
Search using Keywords or Phrases

1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Task** in the navigation pane on the left of your console

3. In the *search box* type your keyword or phrase



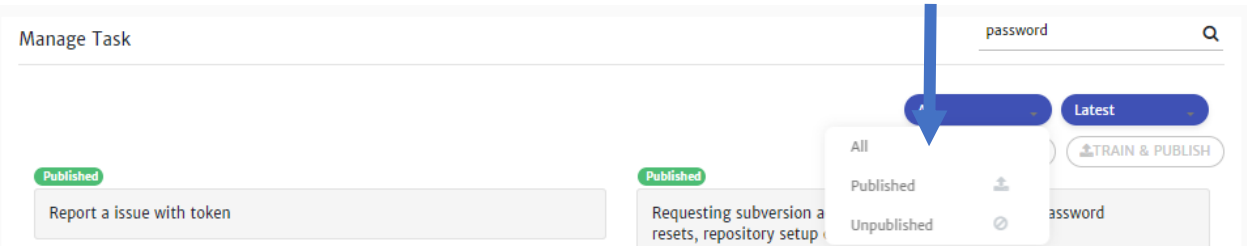
4. Press enter or click the magnifying glass in the search box



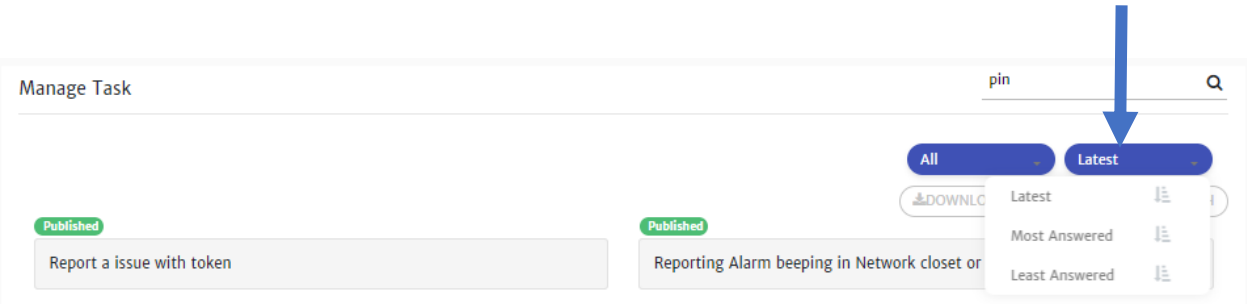
Search Using Filters

There are two other types of filters available:

- Publish status



- Latest, Most answered or Least answered

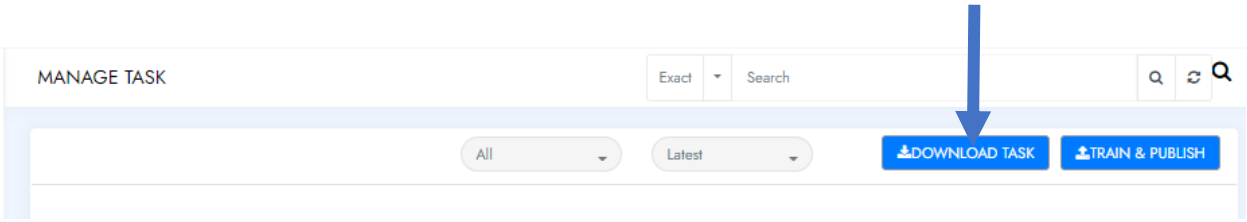


1. Select the filter you like
2. View the results

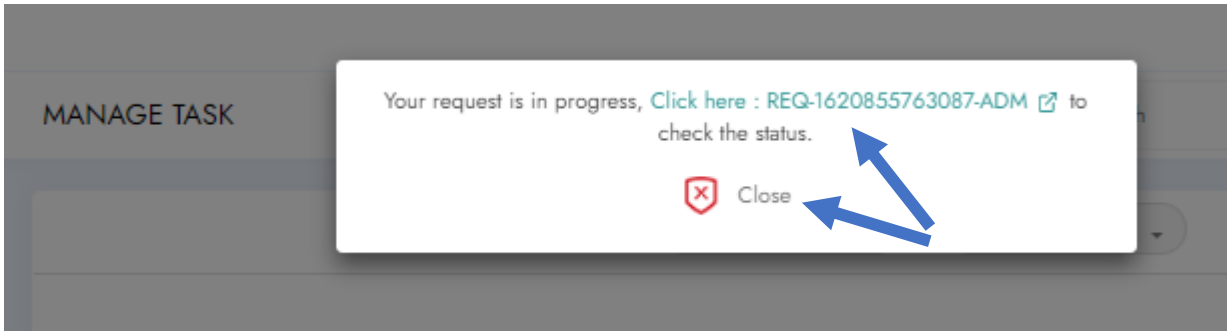
NOTE: NOTE: Filters can be used in combination with word/phrase search. They can be applied before or after. You simply place your filters before or after searching your keyword/phrase. For more on keyword/phrase search refer to Search using Keywords or Phrases.

Download Excel Version of Small Talk

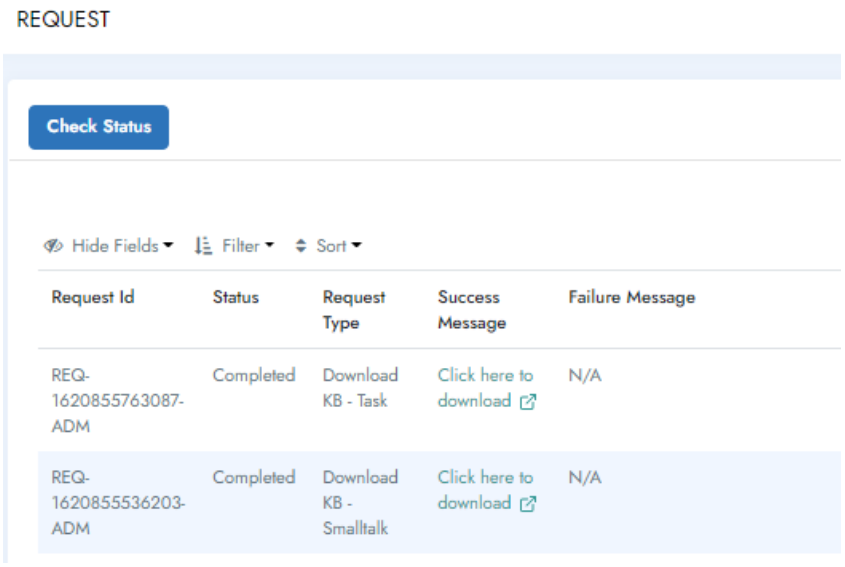
1. Click on **Knowledge Mgmt** in the navigation pane on the left of your console
2. Click on **Manage Task** in the navigation pane on the left of your console
3. Click **Download Task**



4. You will get a prompt, advising you your request is in progress, you can click on the link in the prompt and skip to step 6 or click **Close** follow the next steps



5. Click **Request** in the navigation pane on the left of your console
6. Look for your request in the list

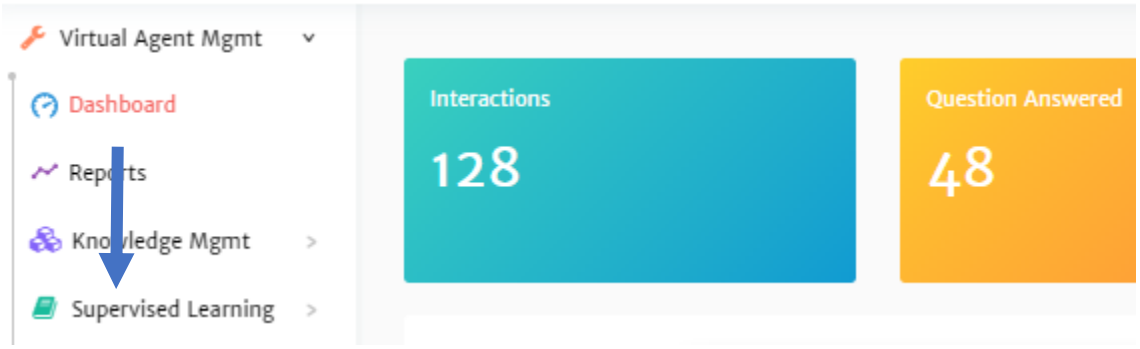


7. If the status is *Completed,* under *Success Message* you will have a *Click here to download* option to click on. If the status is *In Progress*, click **Check Status** to get updated status and once *Completed* click on the *Click here to download* option.

Failed Utterances

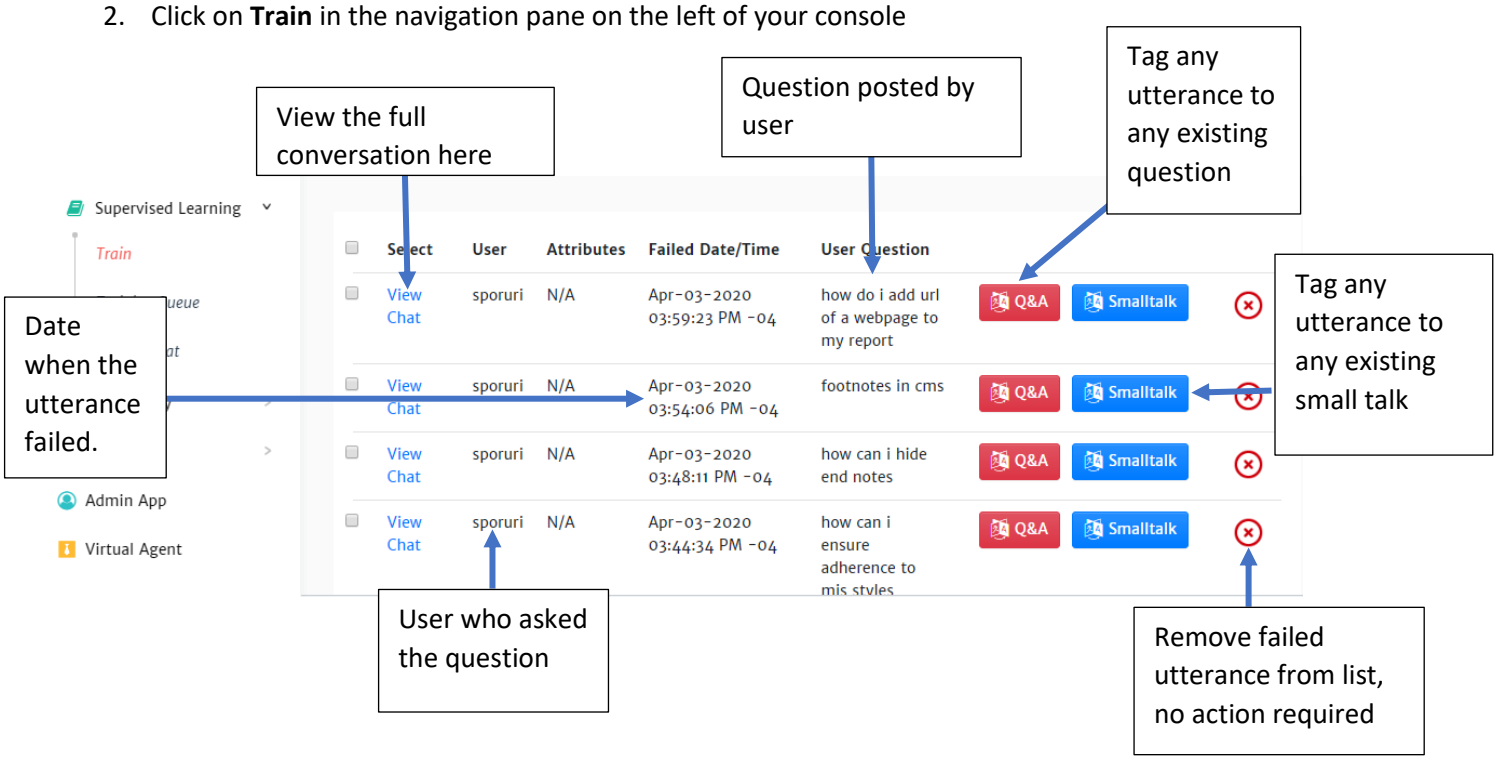
Failed utterances are those inputs/questions for which the bot was not able to help the user.

The **Train** section, allows us to train these utterances and make them part of the bot's Knowledge Base (Mange Task, Manage Q&A and/or SmallTalk). It can be found under the **Supervised Learning** section.

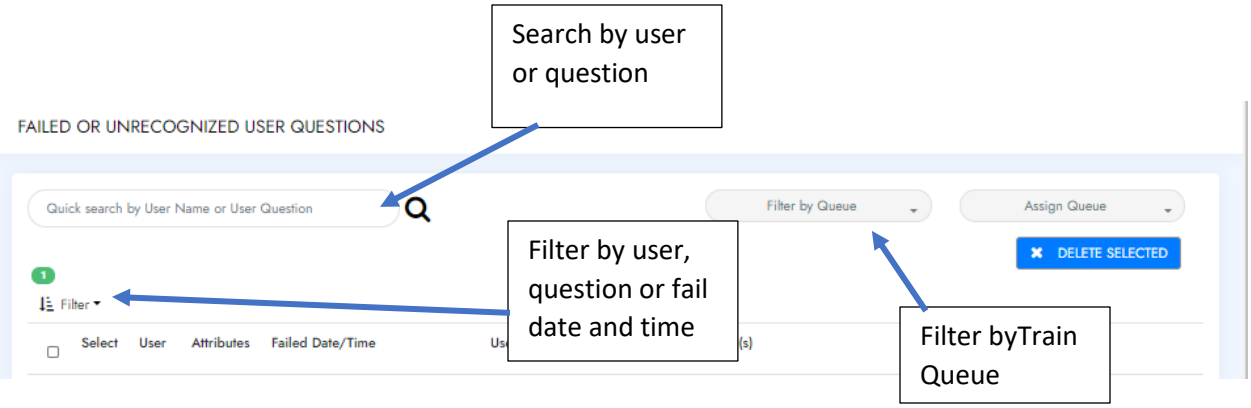


Training Failed Utterances

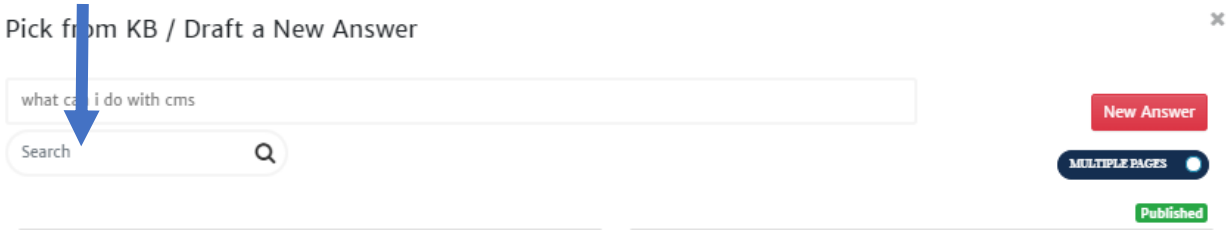
1. Click on **Supervised Learning** in the navigation pane on the left of your console
2. Click on **Train** in the navigation pane on the left of your console



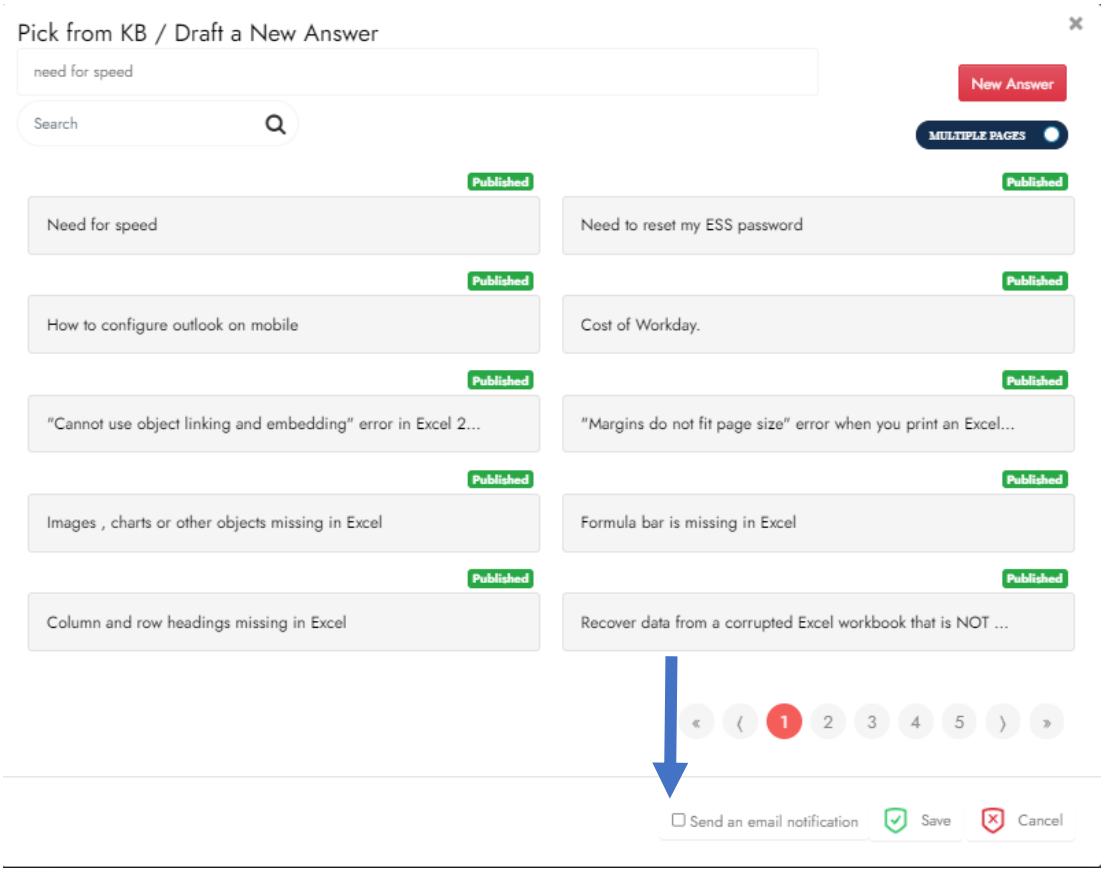
3. Look at the user question under the *User Question* column. If you are looking for something in particular use the search or filters available.
    - If you require more details, you can read the chat by clicking on the *View Chat* link at the beginning of the same line of the failed utterance



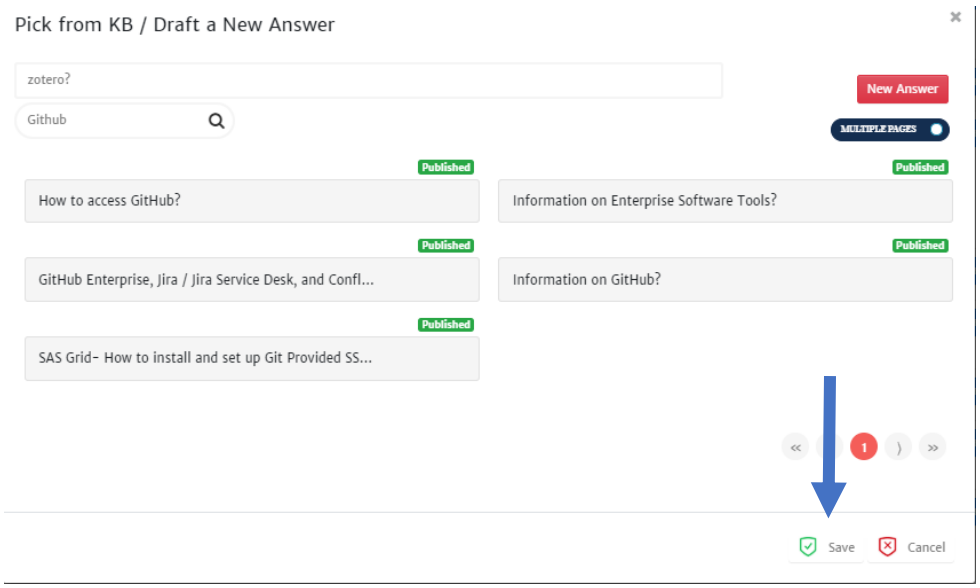
4. If the failed utterance:
    - Needs to be tagged/added to an existing dialogue click on Q&A, Task or SmallTalk (whichever is relevant)
        A. Go to **Supervised Learning** and then select **Train** in the sub menu
        B. Select the question you would like to train the bot on
        C. In the dialogue box that opens, enter a keyword or phrase into the search box to find the content you want to link it to



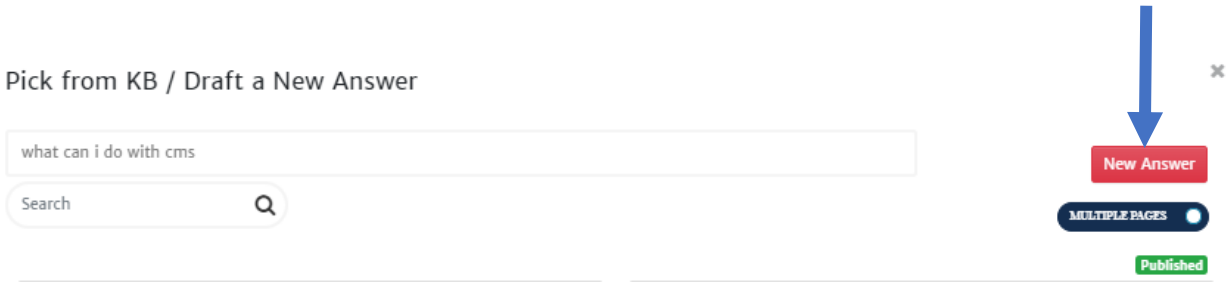
        D. Select the correct dialogue you would like to link it to
        E. If you want to notify the user that the bot has been trained, click the box next to "Send an email notification"



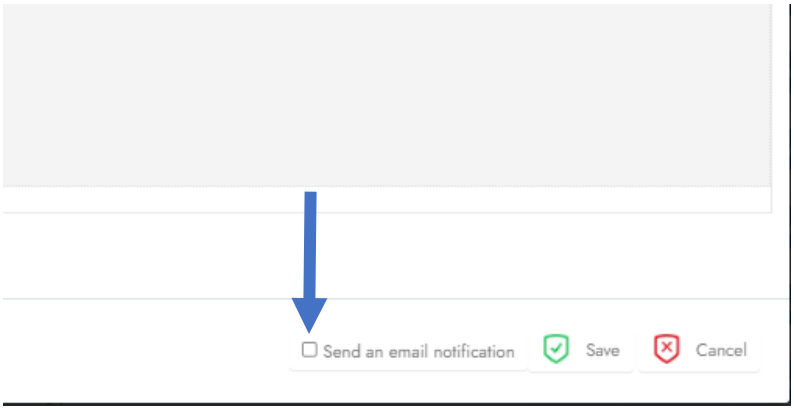
F. Click **Save**



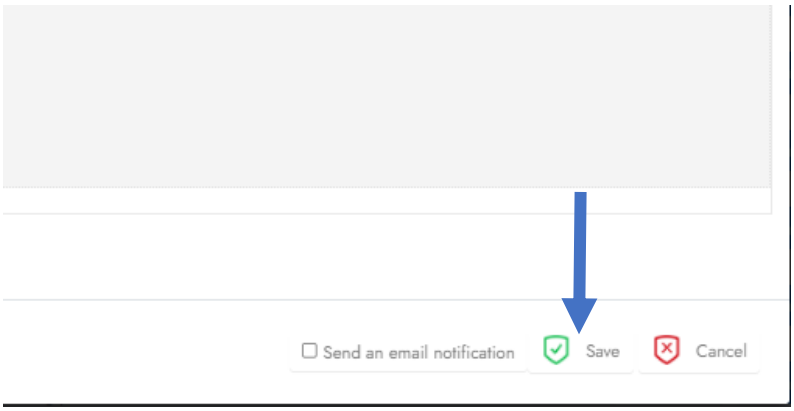
- If you need to create a new Q&A dialogue or Small Talk
  A. Go to **Supervised Learning** and then select **Train** in the sub menu
  B. Select the question you would like to train the bot on
  C. Click on **New Answer**

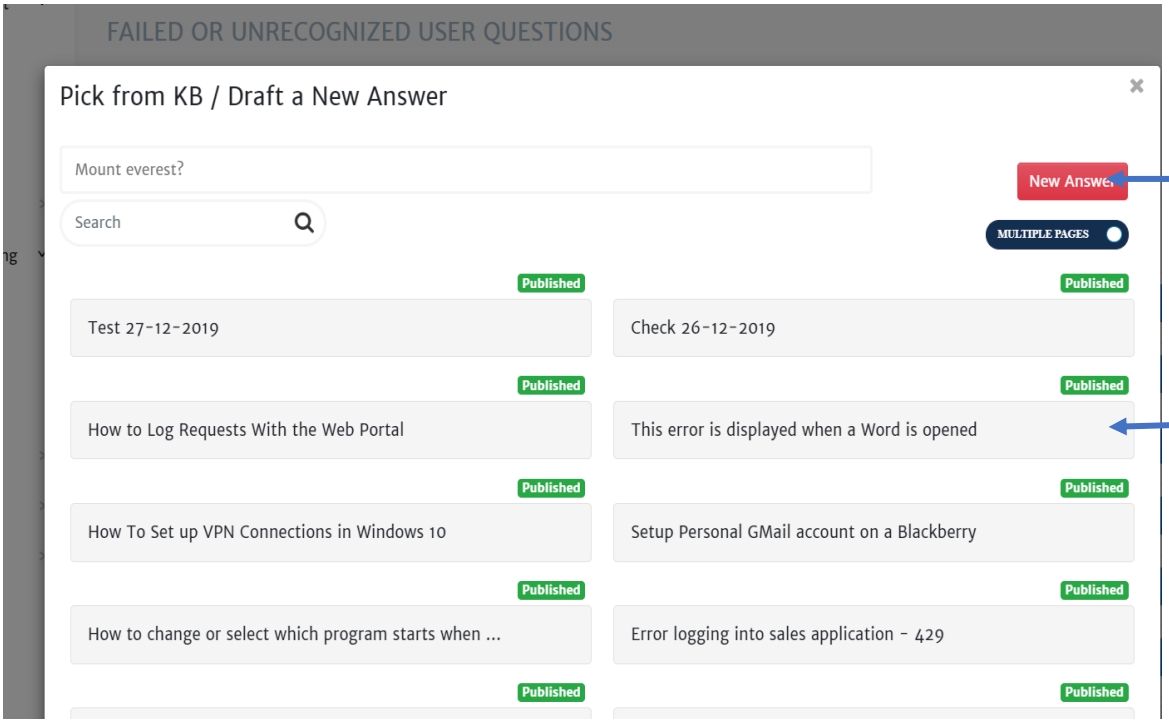


D. The Text Editor box will appear
E. Create dialogue as usual (For further information, see *Creating SmallTalk* or *Creating Simple Dialogue*)
F. If you want to notify the user that the bot has been trained, click the box next to "Send an email notification"



G. Click **Save**

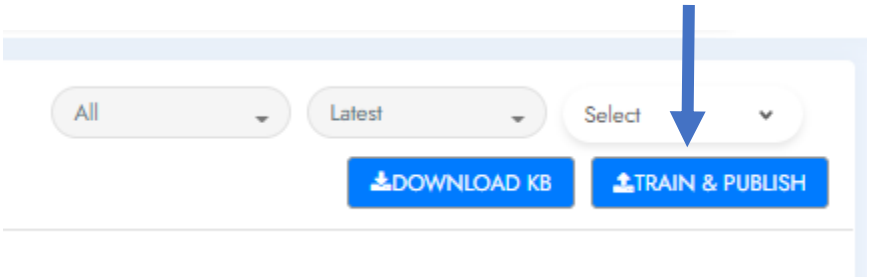



FAILED OR UNRECOGNIZED USER QUESTIONS
Pick from KB / Draft a New Answer
Mount everest?
New Answer
Search
MULTIPLE PAGES
Published
Test 27-12-2019
Published
Check 26-12-2019
Published
How to Log Requests With the Web Portal
Published
This error is displayed when a Word is opened
Published
How To Set up VPN Connections in Windows 10
Published
Setup Personal GMail account on a Blackberry
Published
How to change or select which program starts when ...
Published
Error logging into sales application - 429
Published
Published
Tag to as a new question
Tag to an existing question

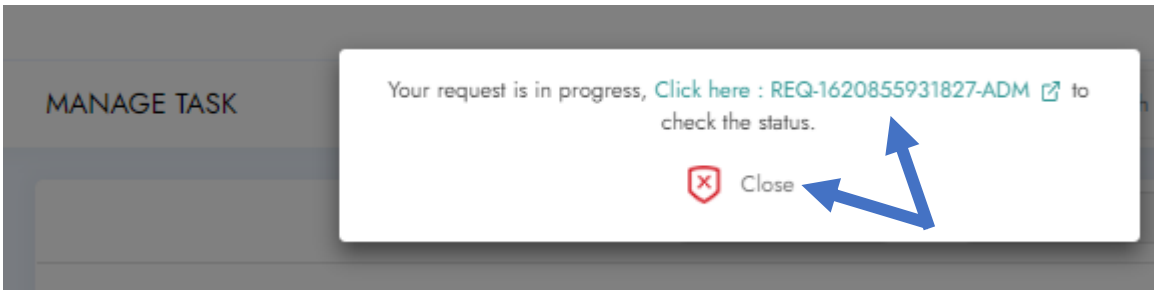
Publishing to Live Environment

When new dialogues and changes are ready to be implemented in the live environment and available to users, the bot needs to be trained and things need to be published.

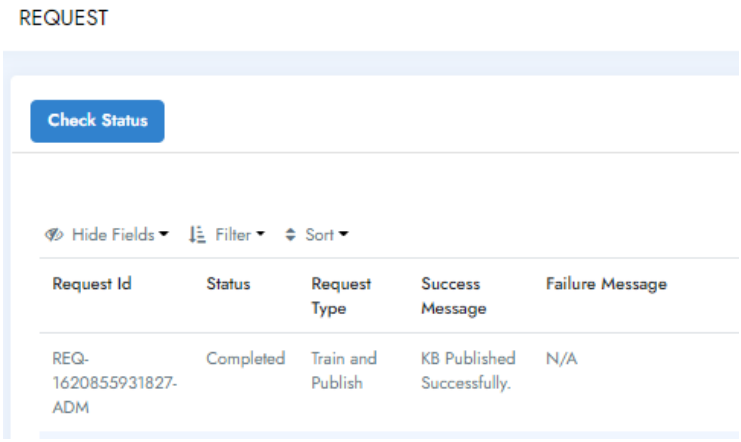
In the various Knowledge MGMT sections (Mange Q&A, SmallTalk and Mange Task) under the search filters, the is the Train & Publish button.



1. Click on **Train &Publish** button
2. You will see the following prompt, you can click on the link in the prompt and skip to step 64 or click **Close** follow the next steps



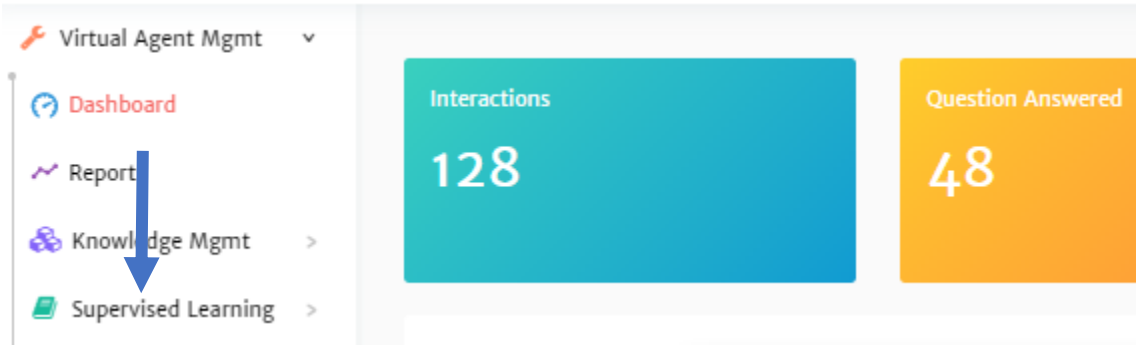
3. Click **Request** in the navigation pane on the left of your console
4. Look for your request in the list



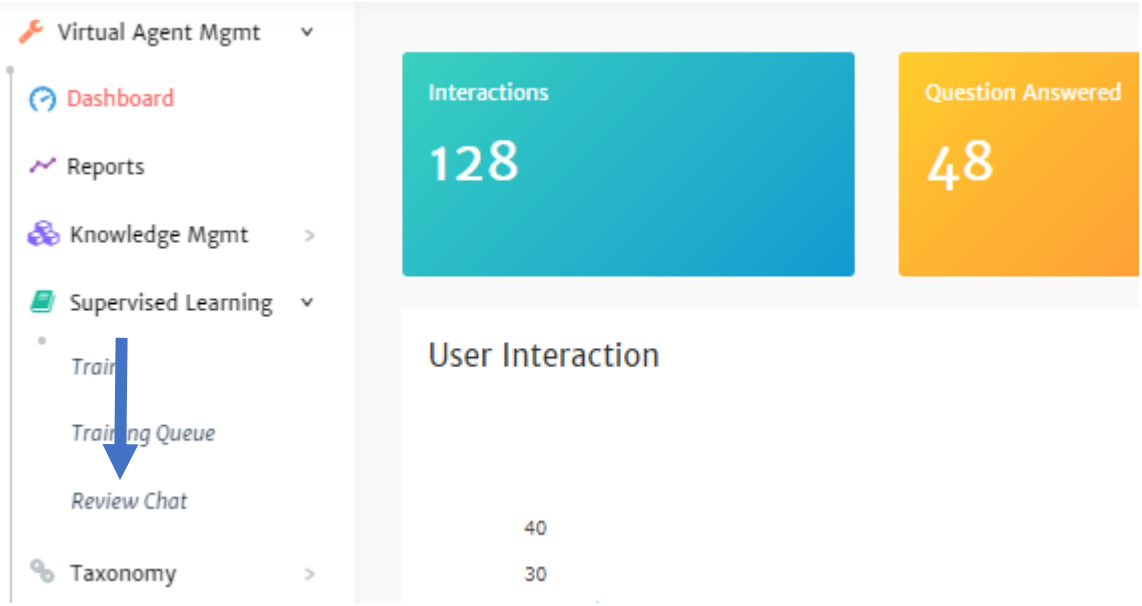
5. If the status is *Completed* and *Success Message* is *KB Published Successfully* your new content is available in the Live Environment. If the status is *In Progress*, click **Check Status** to get updated status until it is *Completed*.

Reviewing Chats

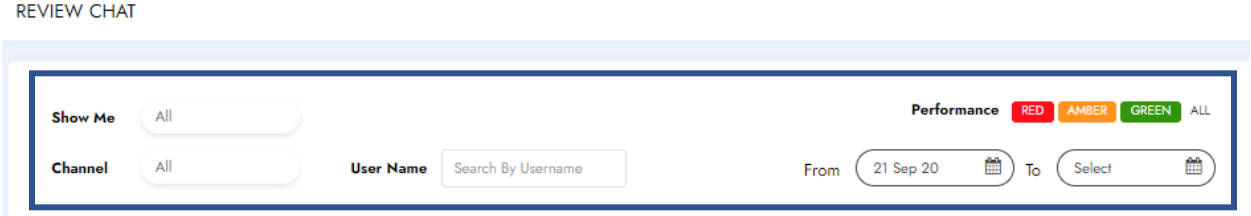
The **Review Chat** section is used to view the conversation between the user and Bot. It can be found under the **Supervised Learning** section



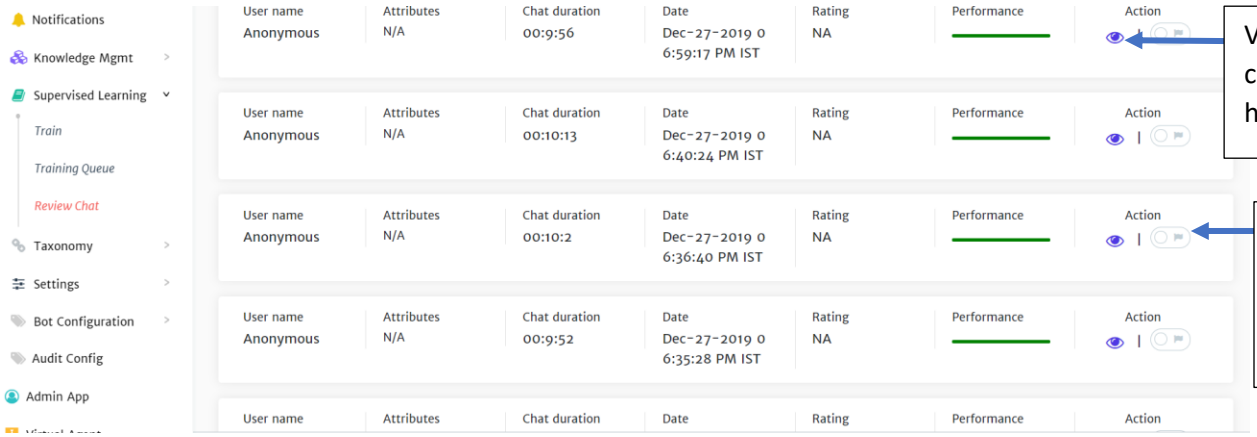
1. Click on **Supervised Learning** in the navigation pane on the left of your console
2. Click on **Review Chat** in the navigation pane on the left of your console



3. To find a specific chat you can use the search by username or filters to narrow down what you are looking for.



4. Once you have found the chat you would like to review, click on the eye icon to see the conversation history.
    - To Bookmark the chat for further action, click on the toggle next to the eye



Reports

The **Reports** section, provides insight into the bot.

There are currently eight reports are available**.**

- *Unrecognized Utterances* - All utterances for which the bot was not able to help the user.

  NOTE: Once the bot has been trained on an utterance it will no longer show in this report.

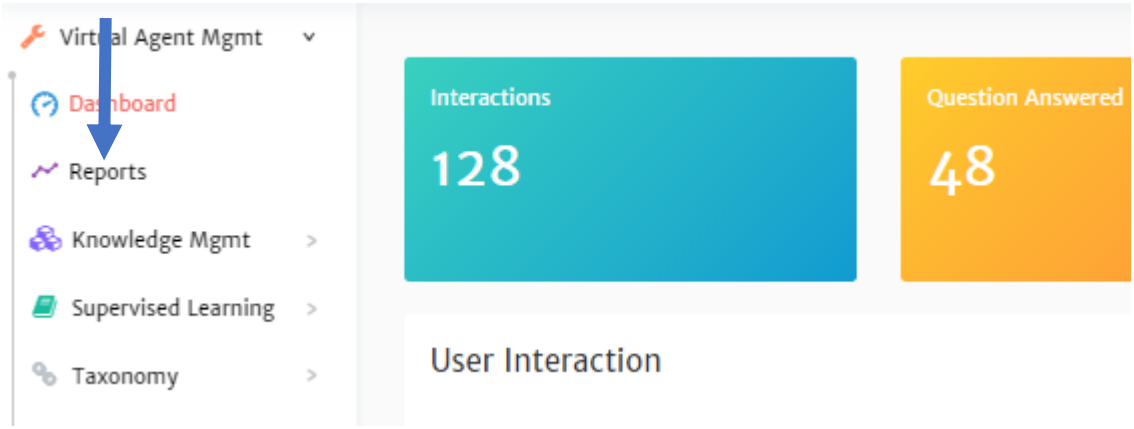
- *User Feedback*- Feedback provided by users about the experience with the Bot.
- *Chat Sessions* - All the instances created for the bot.

  NOTE: If the user asks multiple questions in a single chat, it is counted as one instance.

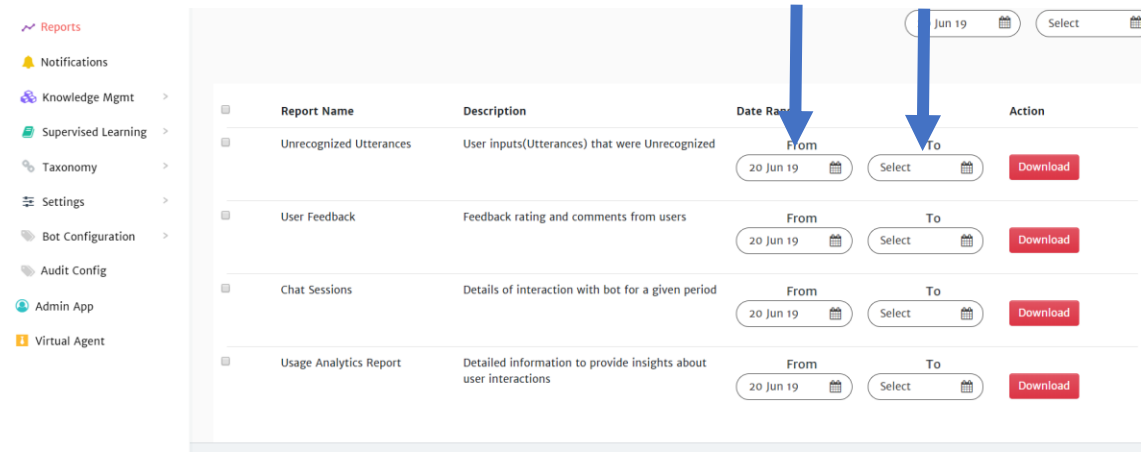
- *Usage Analytics* - Insight about every question, whether it was helpful or not**.**
- *Ticket Details* – Basic information on the tickets raised by the chatbot. Including ticket number, user id/email, team ticket assigned to, category, subcategory and status at the time of creation.
- *CSAT* – Looks at the total number of feedbacks and the average rating by date.
- *Abandoned Sessions* – Number of sessions left unfinished by date.
- *Metrics Summary* – Breakdown of standard metrics such as # sessions, # tickets created, # abandoned sessions, # of tickets resolved by the bot, various CSAT-related metrics etc.

Running a Report

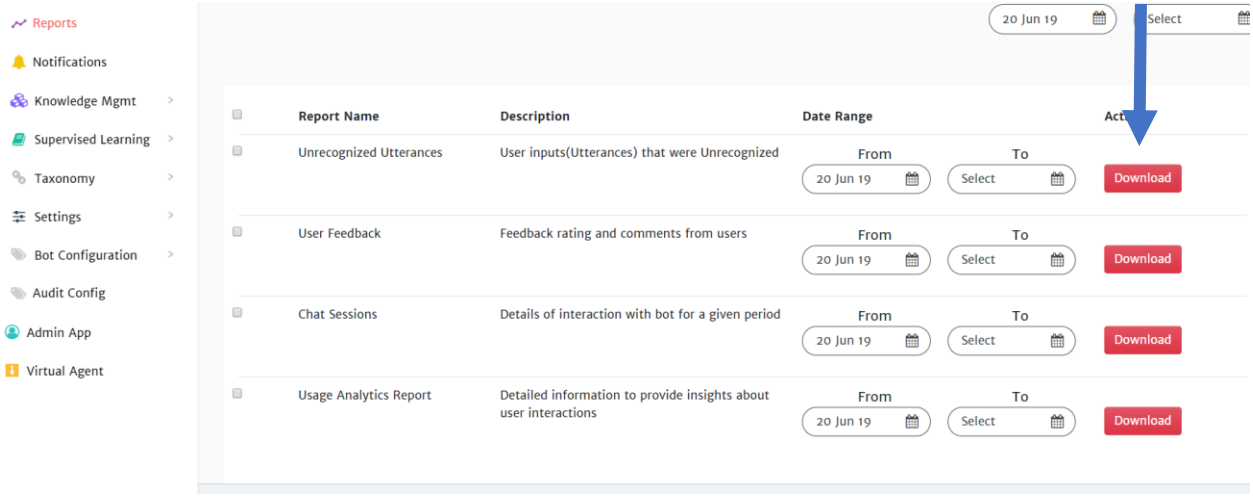
1. Click on **Reports** in the navigation pane on the left of your console



2. Set the date range for the report you would like to run, *From* and *To* the desired dates



3. Click **Download**



4. The file will download to your PC. Locate it and click on it to open in Excel.

Note: Please make sure that Pop-ups are allowed for this URL

User Management

User Management is where users who can access the admin console are added/edited and assign appropriate roles.

Virtual Agent Roles

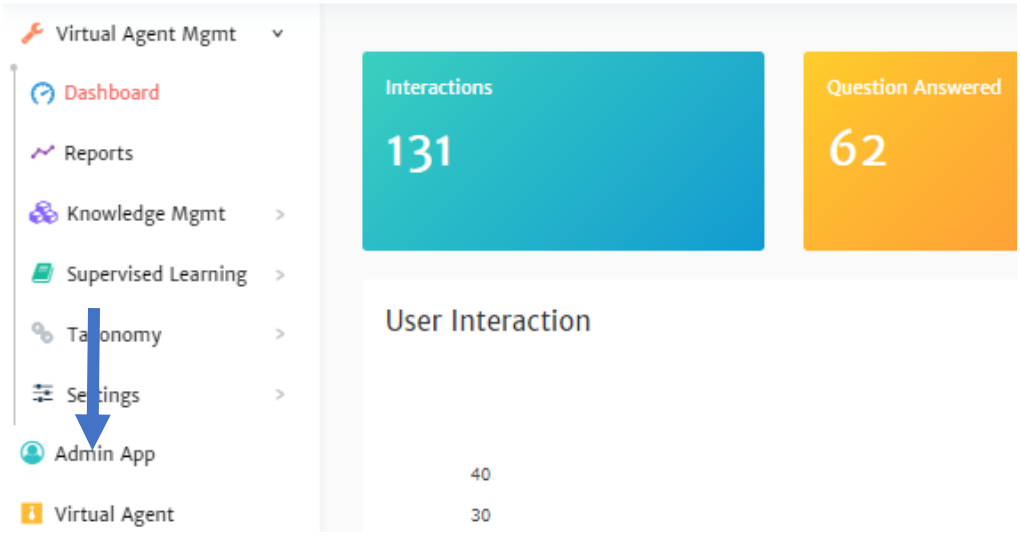
What you are able to see in the navigation pane depends on what roles you have been given in the Admin Portal.

Role	Module	Action / Purpose	Comments
Bot User	Virtual Agent	To access Virtual Agent (Chat Bot)	This is the default / primary role provided to all users who access virtual agent (chat bot) platform for the first time.
Bot Analyst	Virtual Agent Mgmt	Provide access to Virtual Agent (Chat Bot) Management	This role allows a user access to all sections of the Virtual Agent Mgmt section except Bot Settings (i.e. Access to Manage QA, Supervised Learning, Taxonomy)
Bot Admin	Virtual Agent Mgmt	Provide access for Virtual Agent and other maintenance feature	This role allows a user access to all sections of the Virtual Agent Mgmt section including Bot Settings.
User Admin	User Mgmt	Provide access to User Management	This role allows a user access to create users, define attributes & SSO configuration.
Chat Agent	Live chat	Provide access to My Chats	This role provides an agent access to live chat. The user will be able take live chats in My Chat section.
Chat Agent Admin	Live chat	Provide Access to Live Chat Settings	This role gives a user access to view the live chat settings page with the ability to configure queues and assign (add/remove) agents from queues.
Chat Agent Supervisor	Live Chat	Provides additional Privileges within Live Chat	This role allows you to monitor other agent chats, assign chats to agents and/or re-assign chats if needed. In addition, you can review past Live chats.
Ticket User	Ticket Mgmt	End user access to Self-created tickets	This is the default / primary role provided to all end user in the Ticketing Module. This user can create tickets. They can check ticket status in My Tickets menu.
Ticket Agent	Ticket Mgmt	Provide access to My Tickets	This role allows an agent to see tickets raised by users.
Ticket Agent Supervisor	Ticket Mgmt	Provides Supervisor privileges in the Ticketing system.	This role gives you access to ticketing Reports, ability to close tickets at any status and a different view of ticketing if assigned as a queue approver.
Ticket Admin	Ticket Mgmt	Provide Access to Ticketing Settings	This role gives a user the ability to configure queues and assign (add/remove) agents from queues.

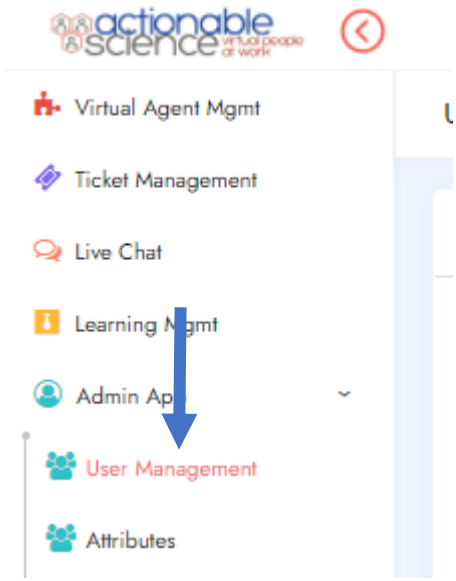
NOTE: Users are advised to logout and re-login to the system for new roles to take effect.

Creating a User Account

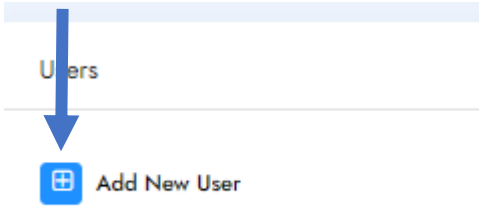
1. Click on **Admin App** in the navigation pane on the left of your console



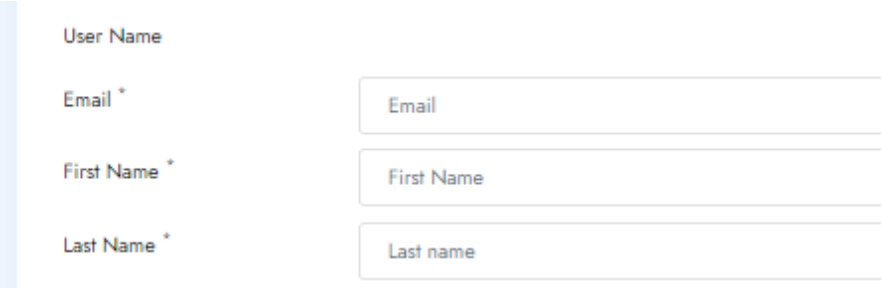
2. Click on **User Management** in the navigation pane on the left of your console



3. Click on the **+** next to *ADD NEW USER*

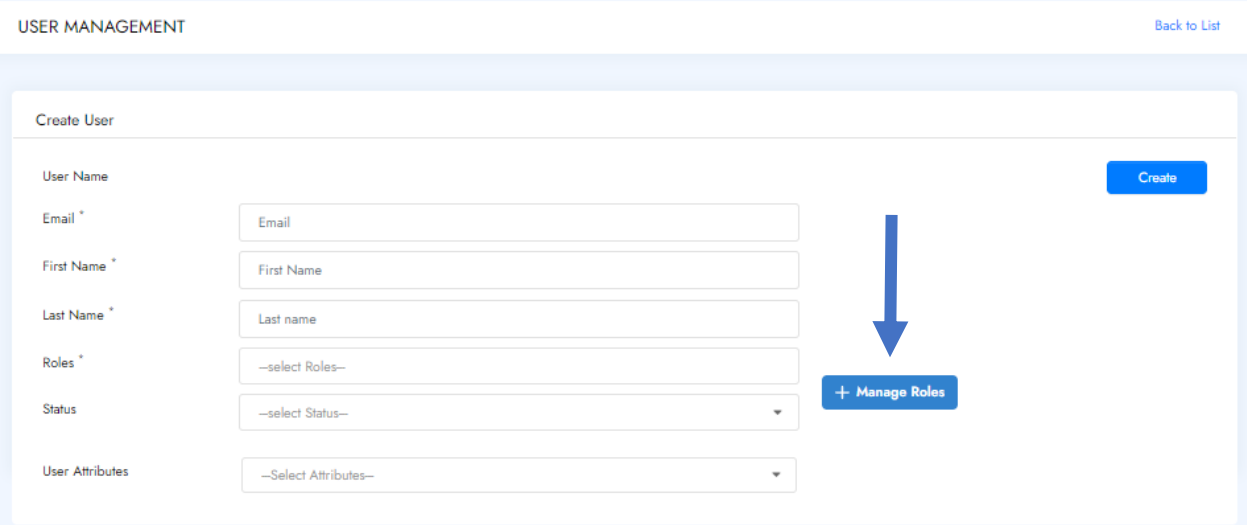


4. On the new screen that appears, enter the user's info
    A. Email Address
    B. First Name
    C. Last Name

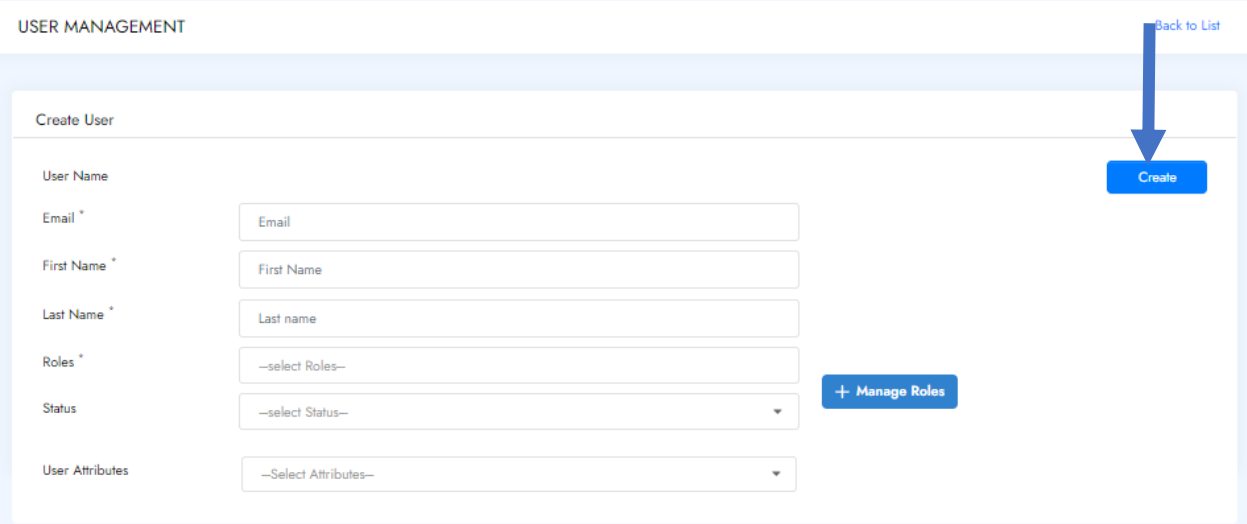


Note: The user name will automatically populate with the user's email address.

5. Click on the **Manage Roles** box

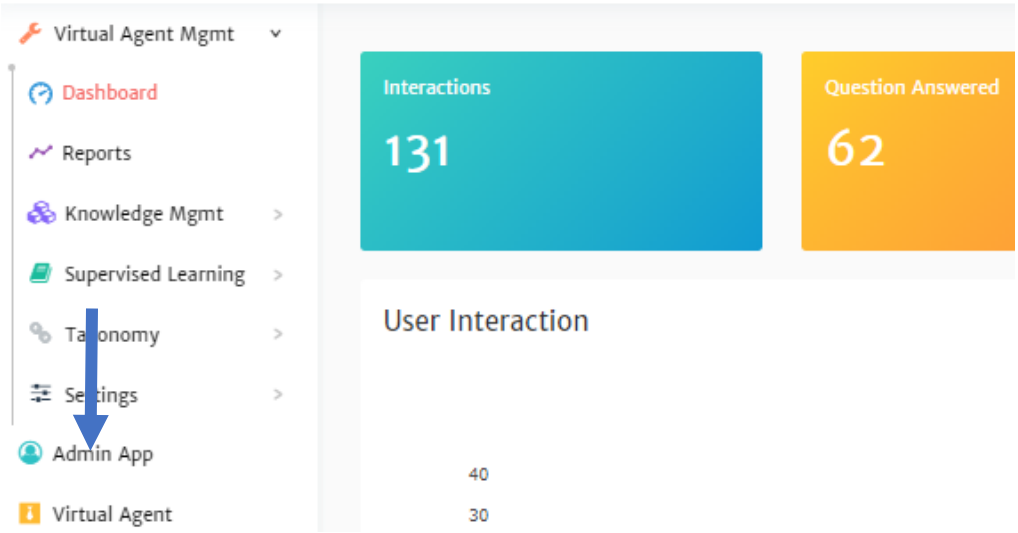


6. Select one or more 'Role Group' which then populates the 'Roles'.
7. Select the Roles for the user
8. Click **Update** when done
9. Set relevant attributes if any
10. Click the **+** for it to be added
11. Click on **Create**

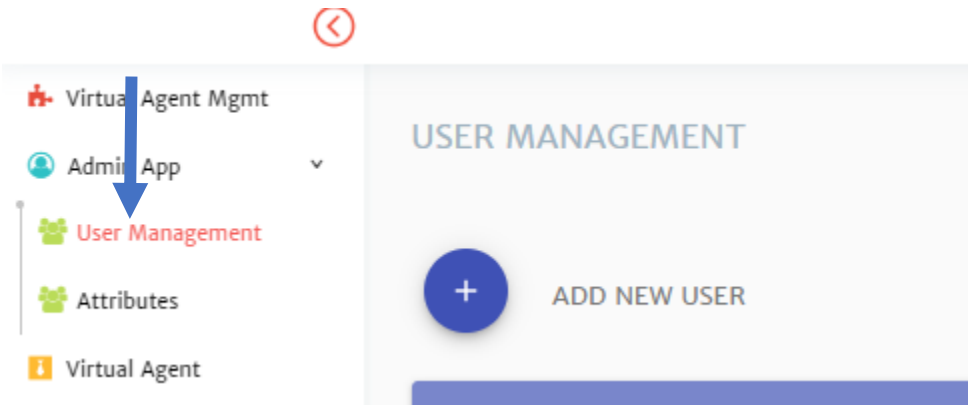


Edit a User Account

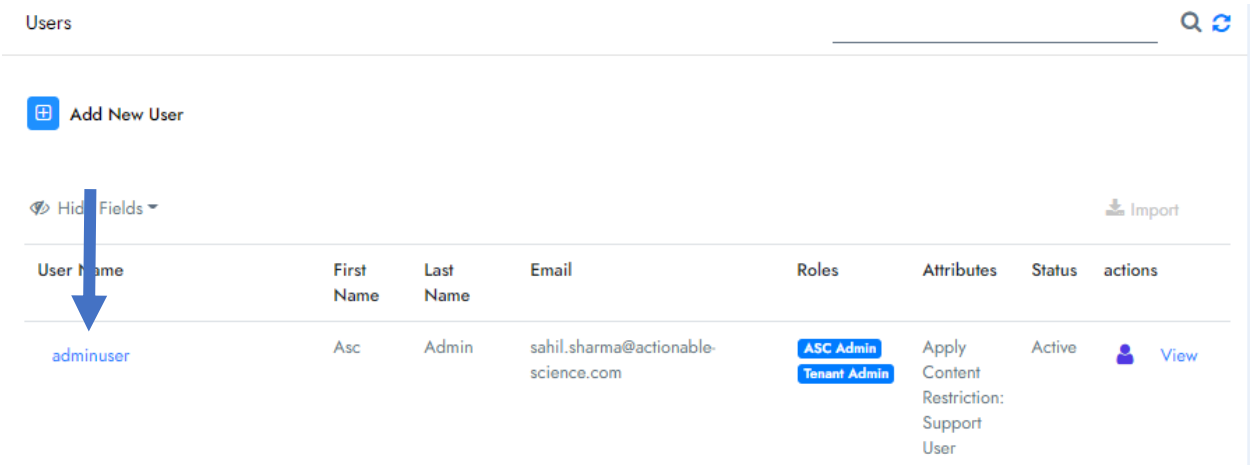
1. Click on **Admin App** in the navigation pane on the left of your console



2. Click on **User Management** in the navigation pane on the left of your console



3. Click on the username on the same line as the user you would like to edit

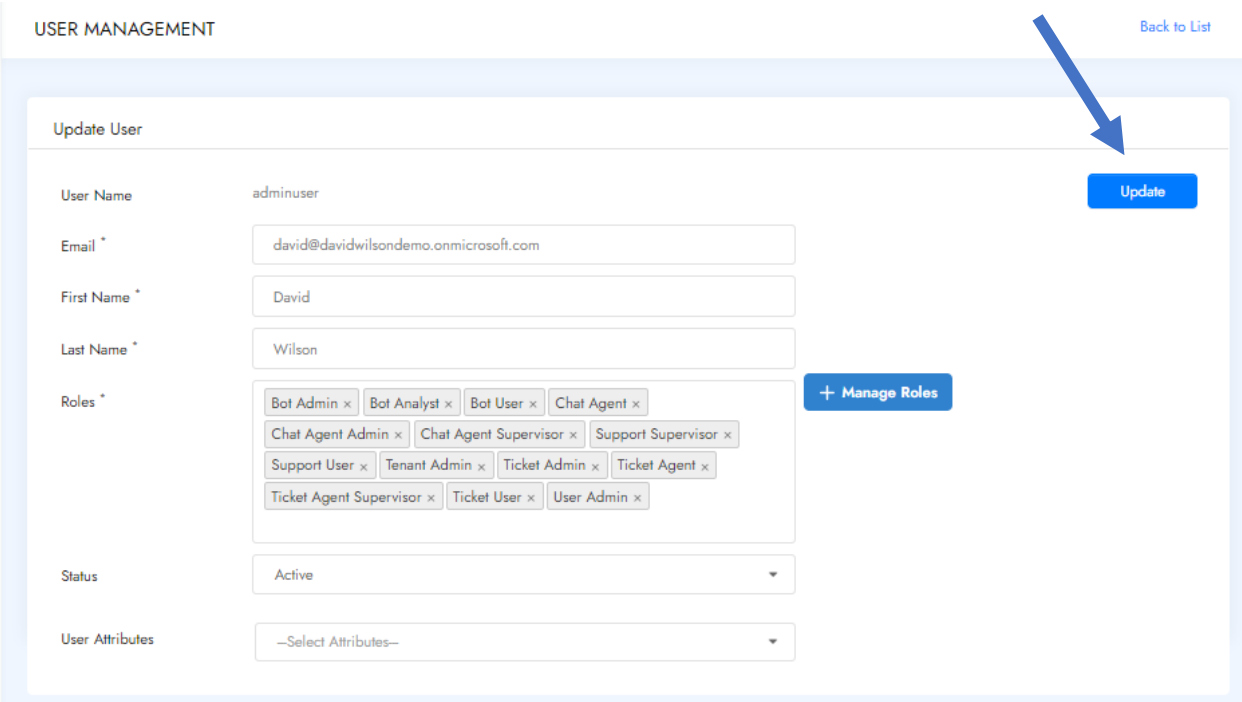


4. A new page will open and you can edit
    - First Name
    - Last Name
    - Roles
    - Attributes

Important Note: Please **only** change **Roles and Attributes** if you have enabled Active Directory. All other information is provided by the account info associated with your AD.

NOTE: When adding and removing a Role, click outside of the Roles box for it to minimize.

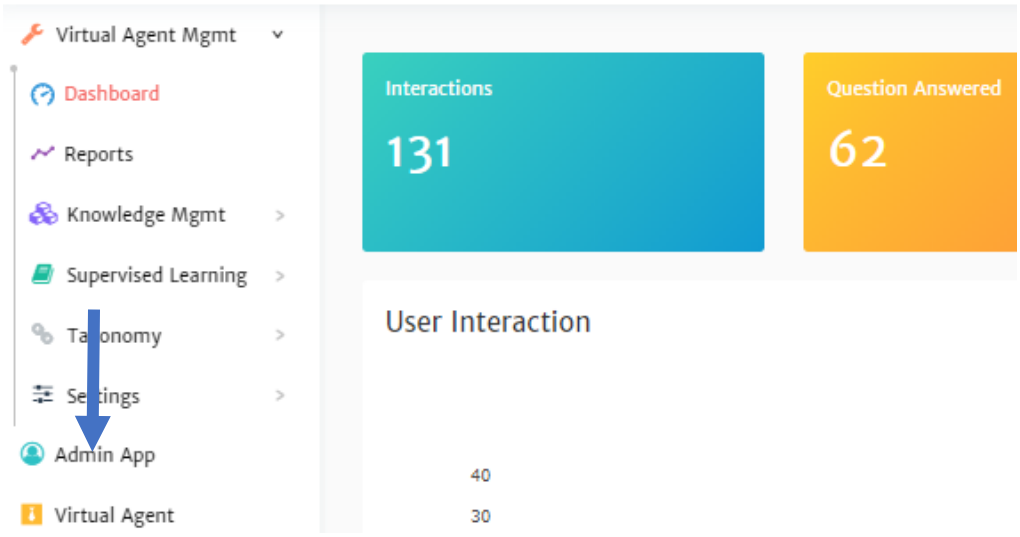
5. When changes are complete, click Update to Save



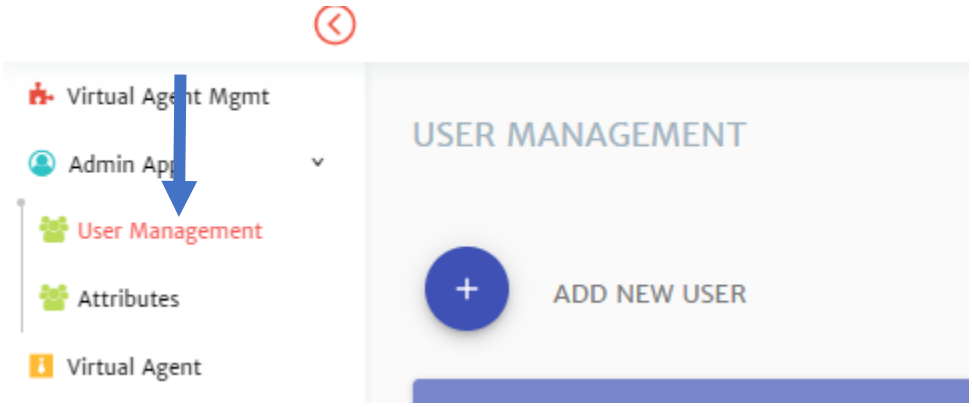
Activate and Deactivate an Account

Accounts can be deactivated and re-activated with a simple click.

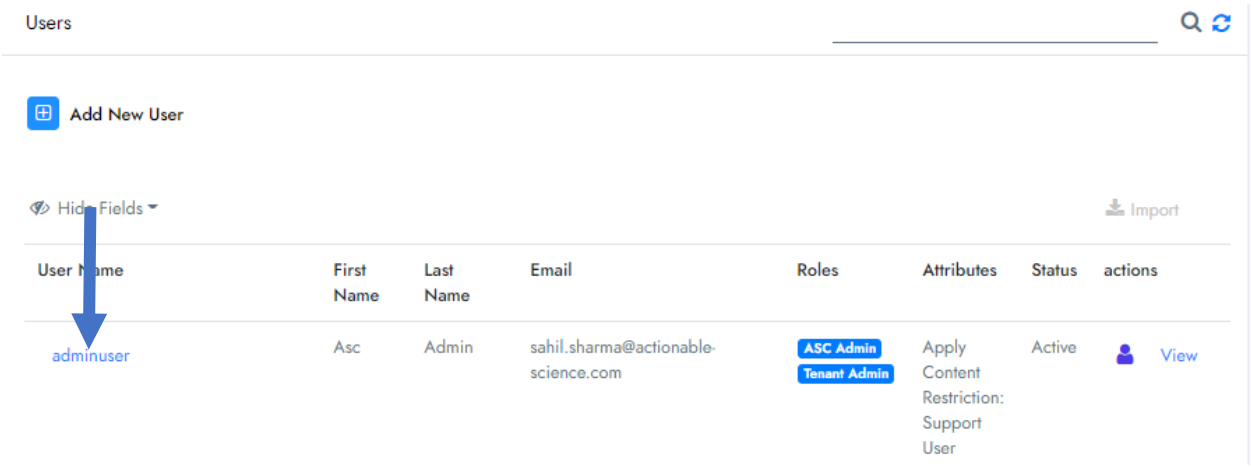
1. Click on **Admin App** in the navigation pane on the left of your console



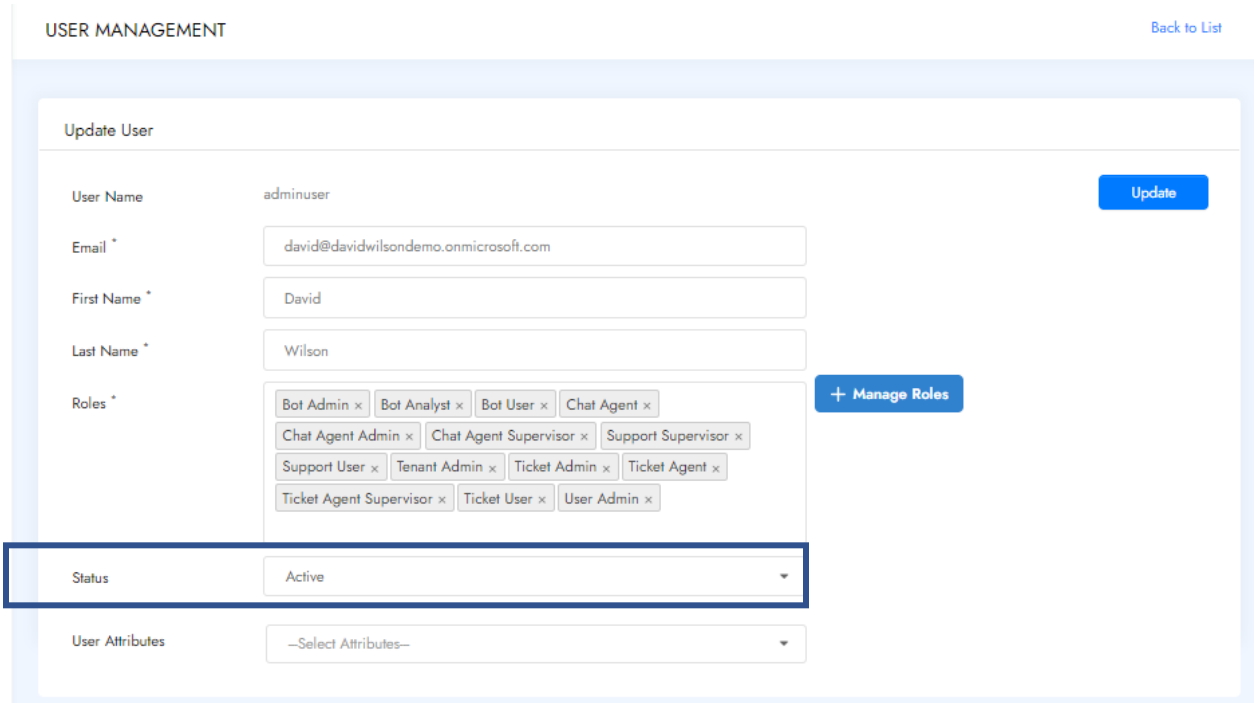
2. Click on **User Management** in the navigation pane on the left of your console



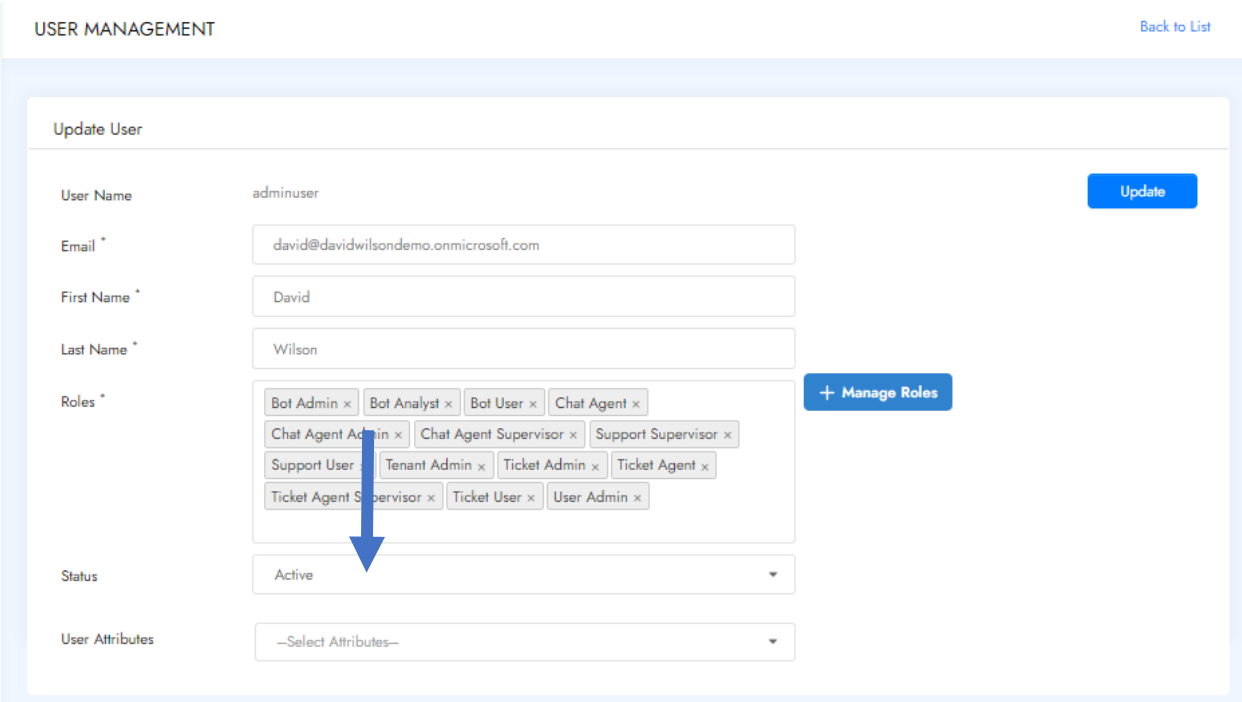
3. Click on the username on the same line as the user you would like to edit



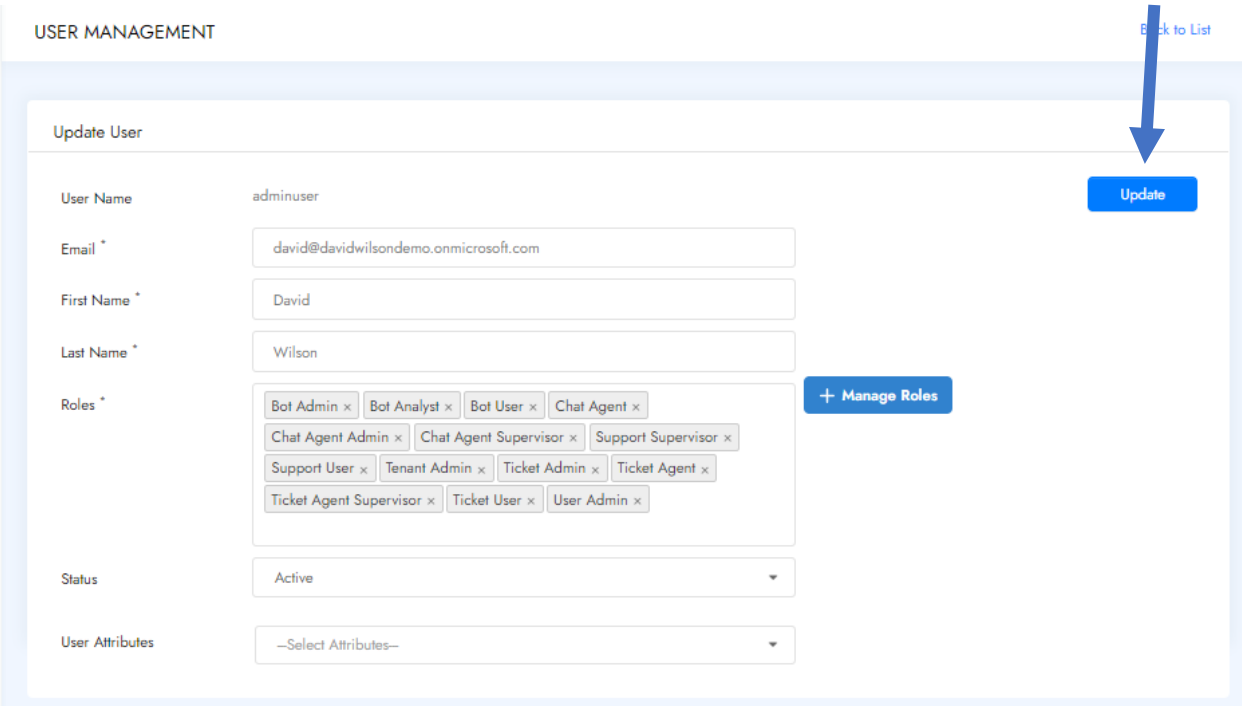
4. Go to the Status field



5. Click on the current Status selection box

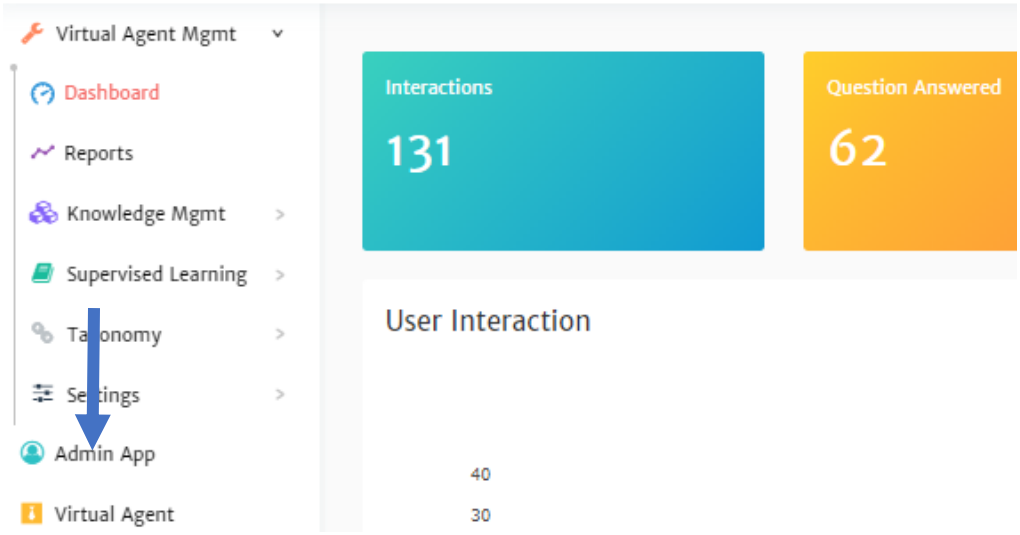


6. Choose the status you would like it to be
7. Click **Update** to save your changes

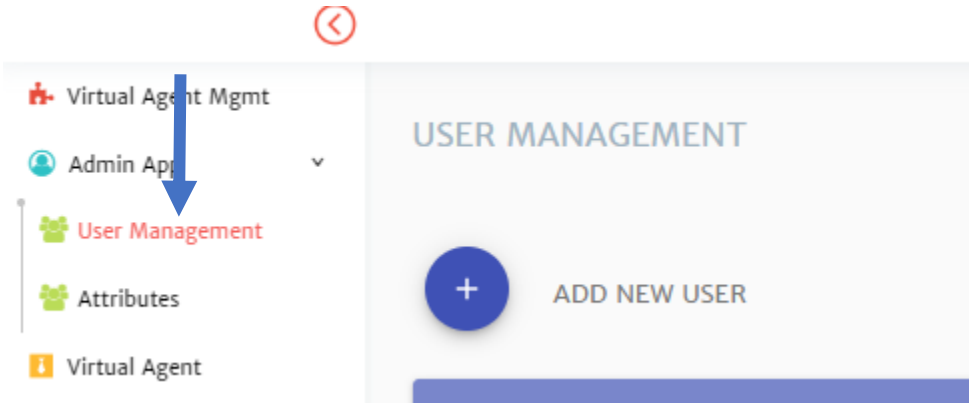


Resetting a Password

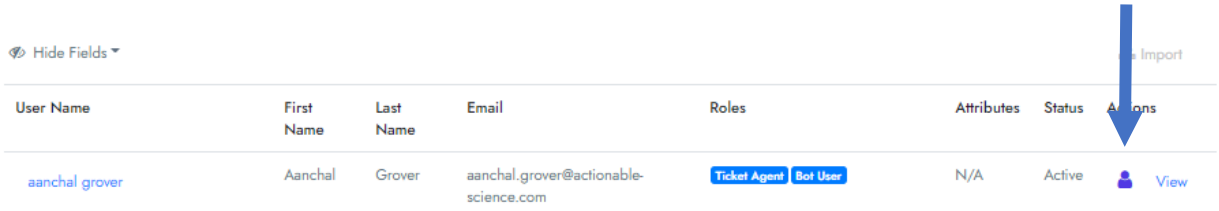
1. Click on **Admin App** in the navigation pane on the left of your console



2. Click on **User Management** in the navigation pane on the left of your console



3. Find the line of the account that requires a password reset
4. Click on the icon that looks like a person



The system will send the email on file for that person, a temporary password. They will be prompted to set a new password when they log in with it.

Workspace Management

The Workspace feature was introduced for effective access management of the knowledge base and live chat requests.

After setting up the Workspaces, admins and agents can be assigned according to the content (knowledge base and live chat) that they need access to. This is helpful when you have multiple departments using the same Rezolve.ai bot and Admin console.

Setting up a Workspace

Role Required

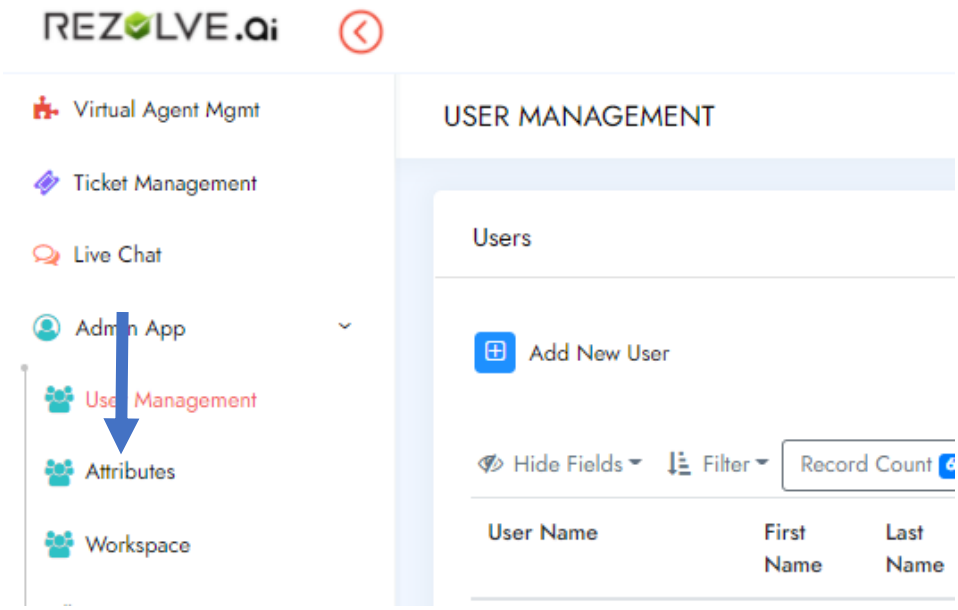
User Admin

Instructions

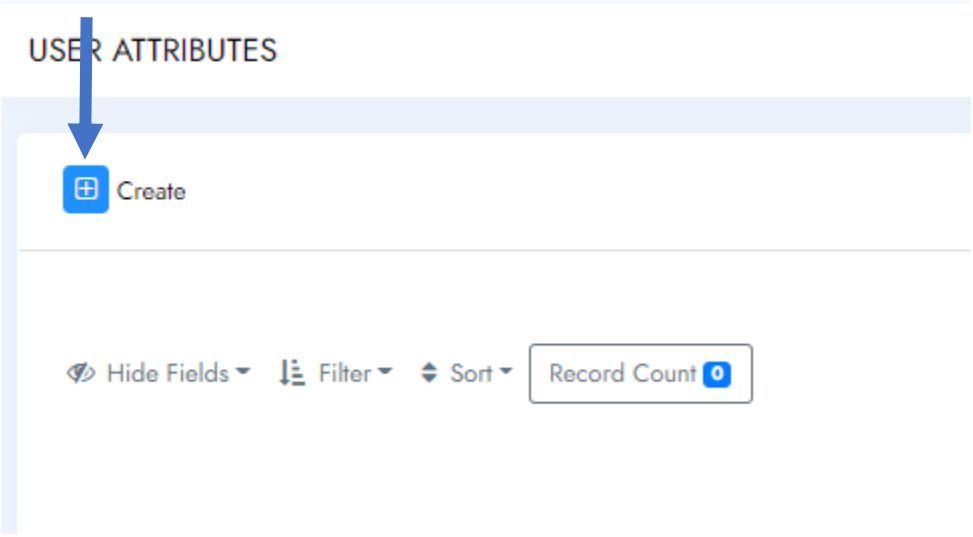
To configure and setup a Workspace is a 3-part process.

Part 1 Add Attributes

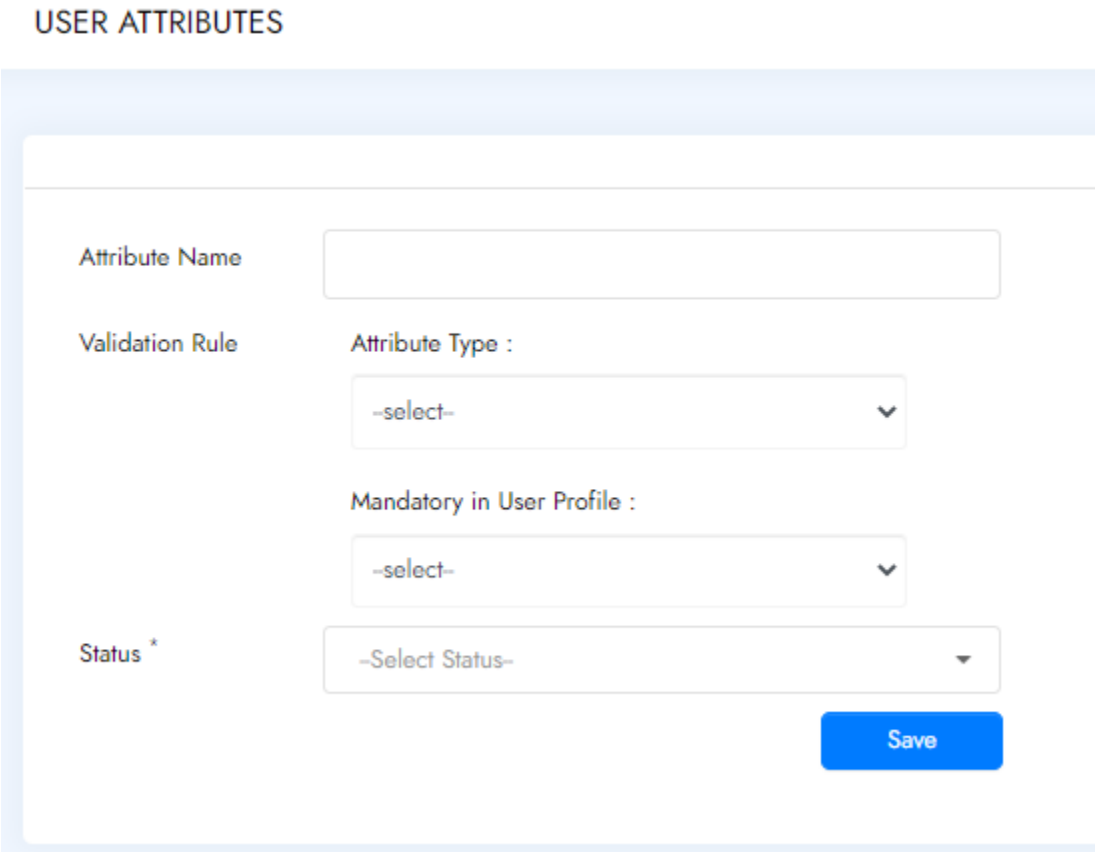
1. Go to **Admin App**
2. Select **Attributes**



3. Click the **+** in front of Create

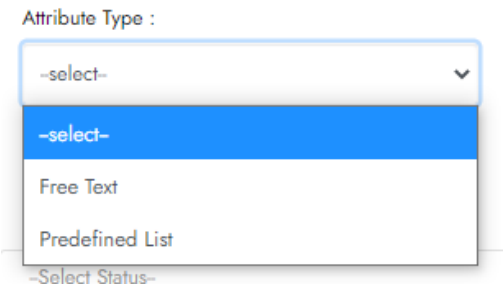


4. Fill out the form to create the Attribute.

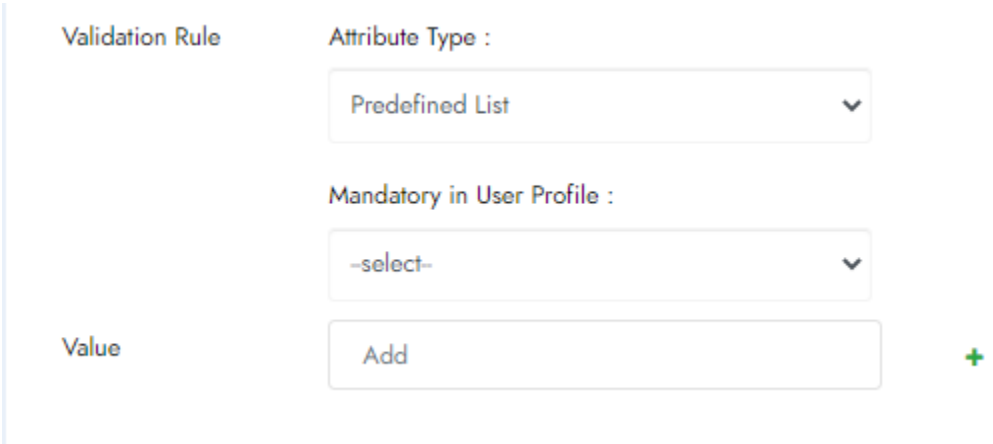


- *Attribute Name* – Select something that will define your list i.e. Department, Location, Language etc

- *Validation Rule* – Attribute Type



  - *Predefined List*– when applying the attribute to someone's profile it can only be selected from a predefined list
    - If selected two additional fields will show that you must fill out:
      - *Mandatory in User Profile* – you can choose if adding this attribute is mandatory or not
      - *Value* – the options to be chosen from your list
        1. Enter the value
        2. Click the + to add it

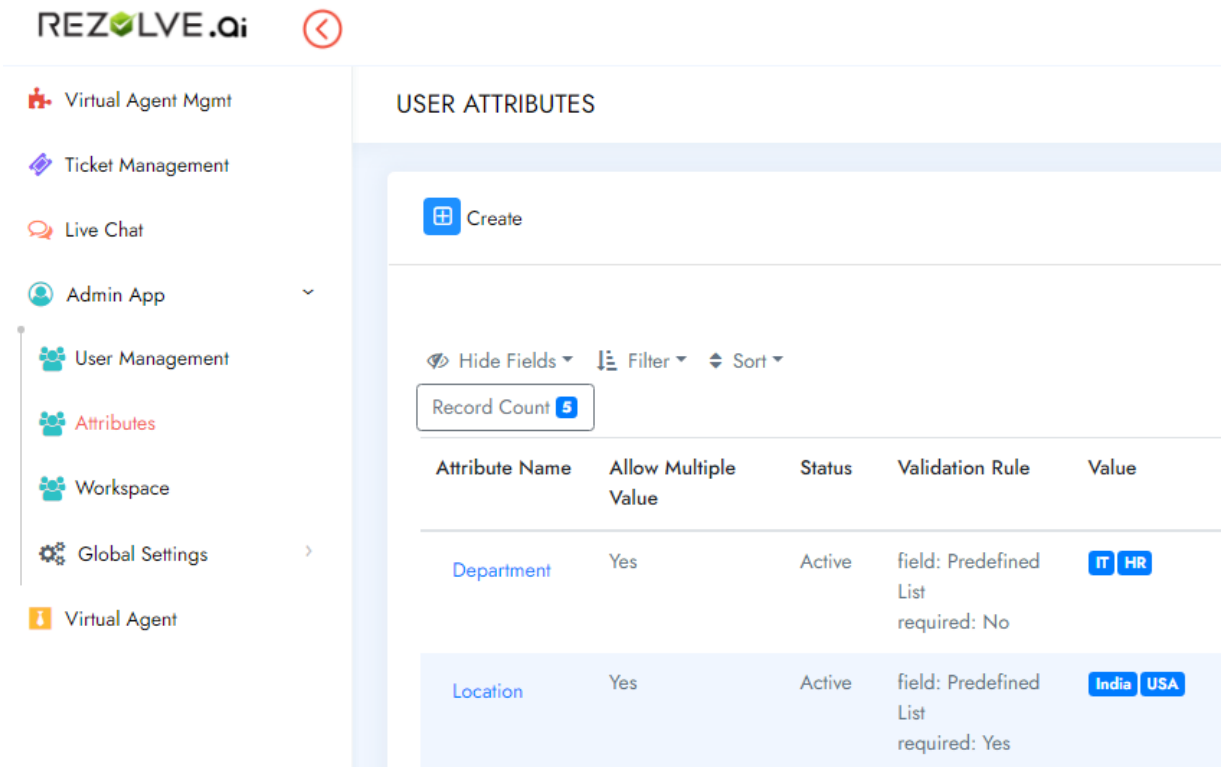


  - *Free Text* – when applying the attribute to someone's profile it can be freely written

- *Status* – to define if this attribute should be available for use

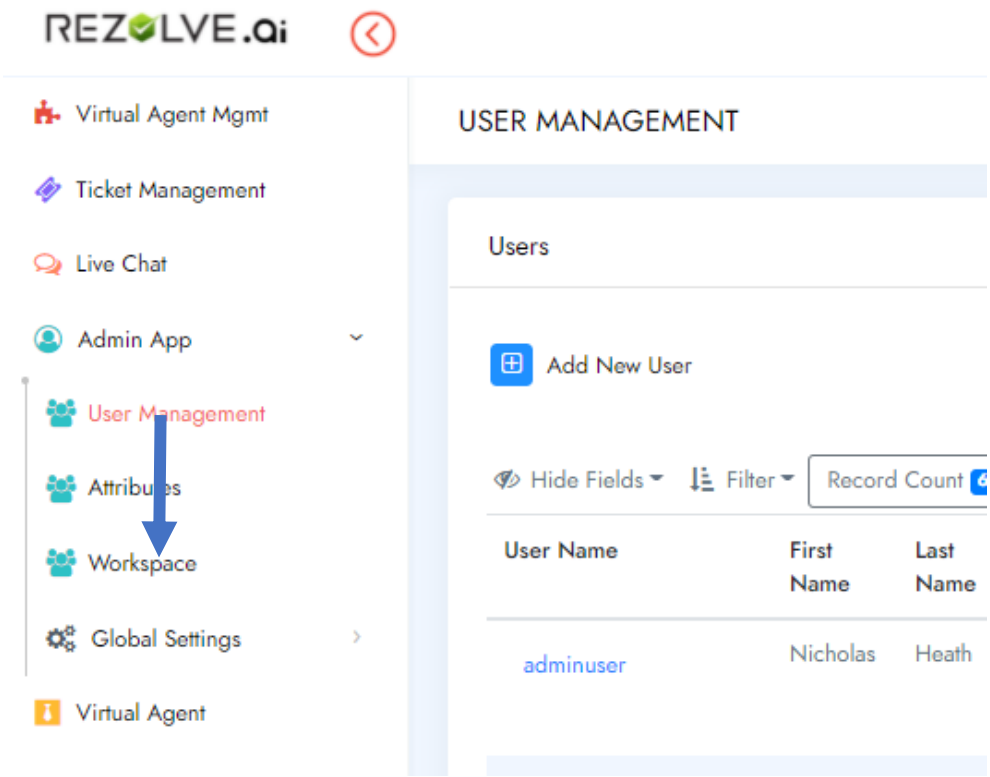
5. Click **Save** when done

Example:



Part 2 Configure Workspace

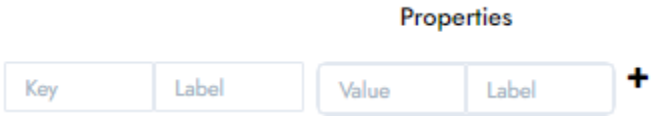
1. Go to **Admin App** and then select **Workspace**



2. Click on the **+** next to Create
3. Type the name and label of the Workspace
4. Select the Workspace type
    - **qna** - for 'Virtual Agent Mgmt'
    - **livechat** - for 'Live Chat'

NOTE: Admin needs to configure workspace for 'Virtual Agent Mgmt' and 'Live Chat'. separately.

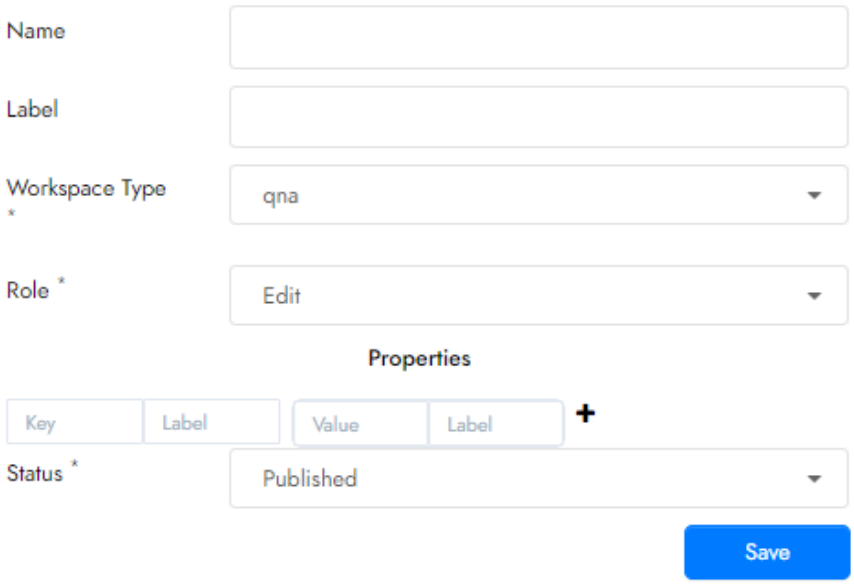
5. Select the relevant Attribute and its Value in the Properties section:
    - *Key* - Enter the name of the Attribute that will define who has access to this Workspace
    - *Label* – for the label box right next to *Key*, we recommend that the label should be the same as the *Key*
    - *Value* - Enter the Attribute Value that will define who has access to this particular Workspace
    - *Label* – for the label box right next to *Value*, we recommend that the label should be the same as the *Value*



NOTE: A workspace can have multiple attributes.

6. Select Status as **'Published'** and click **'Save'**

Example - HR Helpdesk Workspace can be created using the Department attribute and value HR.

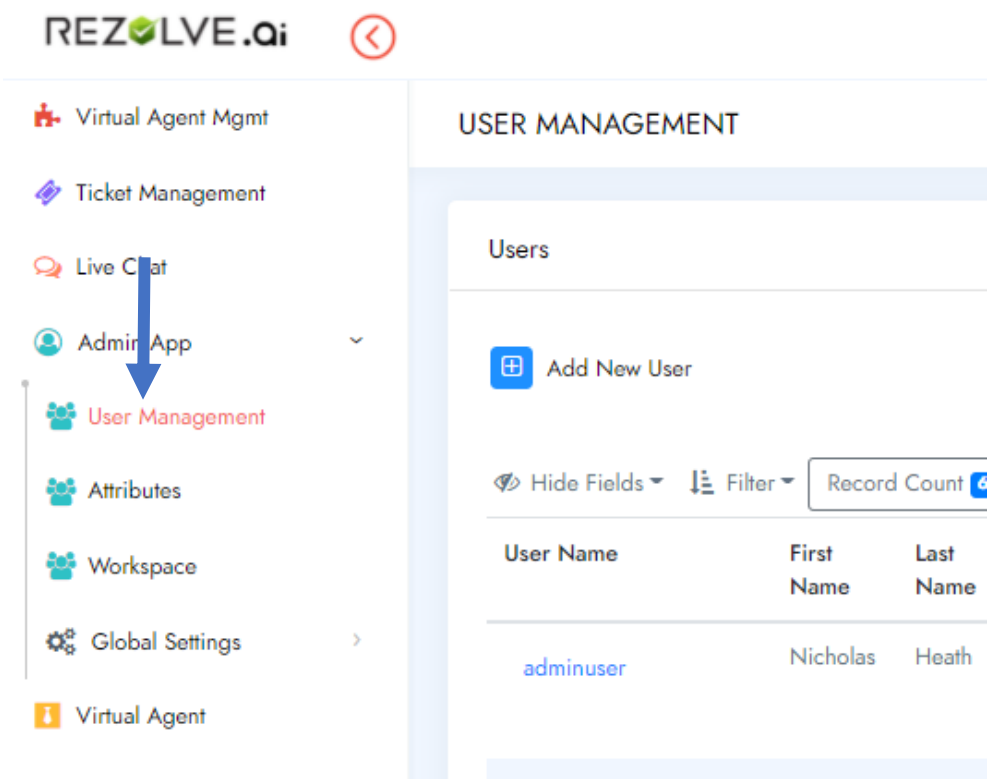


Part 3 Assigning Workspace to a user

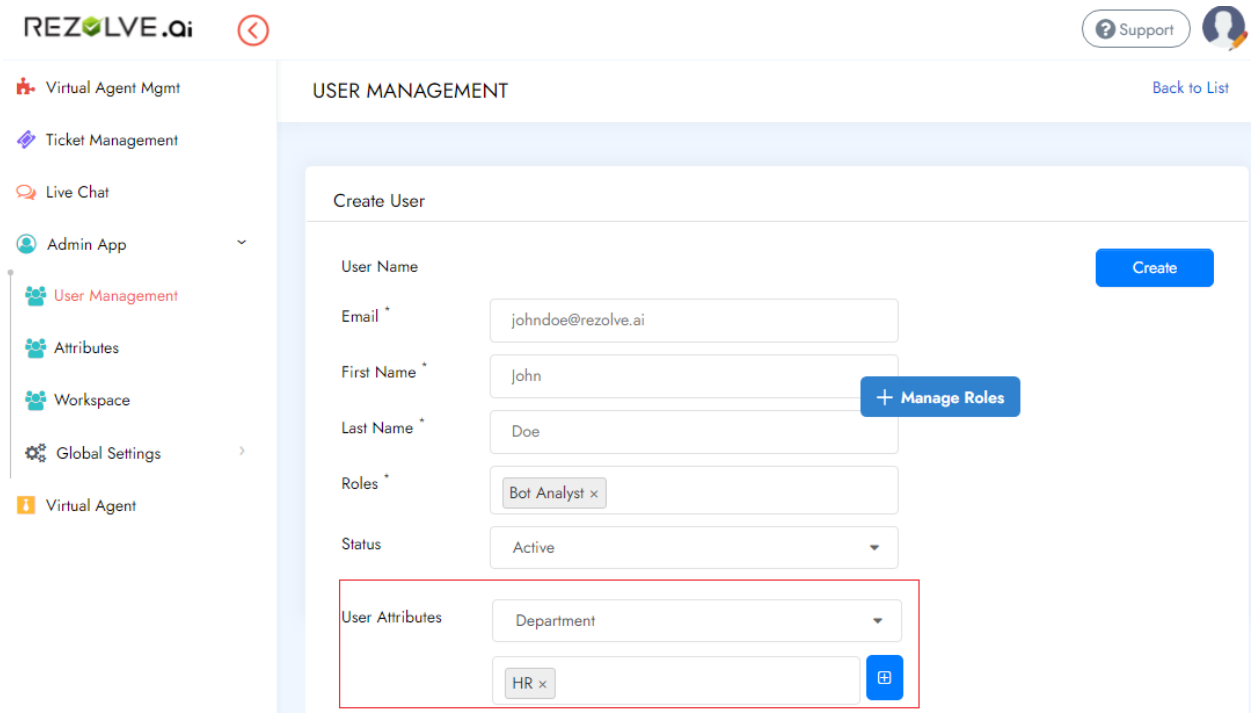
The attribute added to a user's profile decides the Workspace access. For example, a user with attribute Department: HR will see the 'HR Help desk Workspace' only.

User Admin can assign required Attributes to the user profile for granting workspace access.

1. Go to **Admin App** and then select **User Management**



2. Select the person you would like to give Workspace access to or click + create if you are manually creating the account
3. Make sure all mandatory fields are filled
4. Assign to proper role for your Workspace
    - Qna Workspace – Bot analyst or Bot Admin
    - Livechat Workspace – Chat Agent, Chat Agent Admin and/or Chat Agent Supervisor
5. *Status* should be **Active**
6. Select the corresponding Attribute from User Attribute dropdown
7. Select or enter the Value to assign to this user
8. Click the + to add the Value to the profile
9. Click **Update** or Save



Workspace in Action

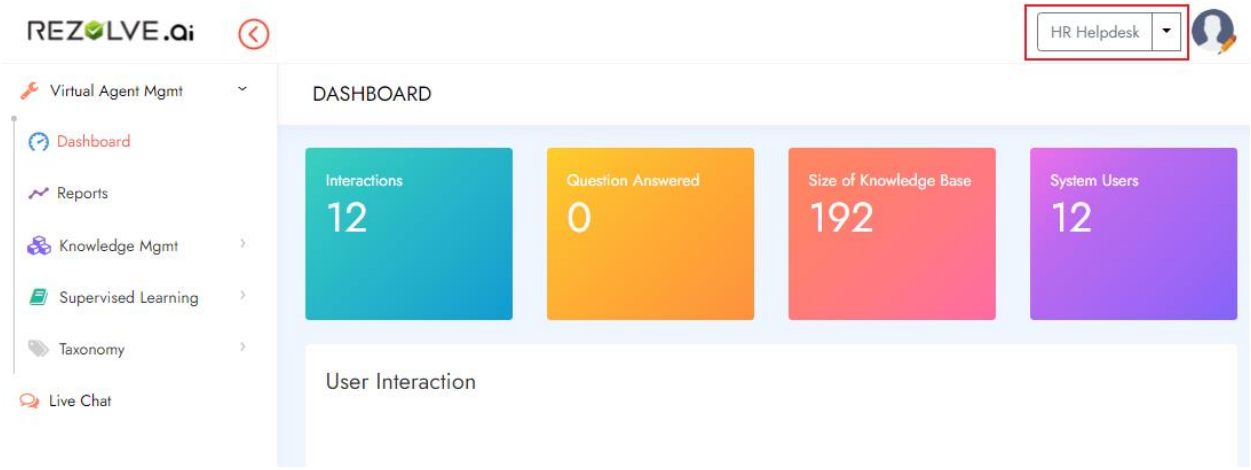
Required Roles

Anyone with one or more of the following roles can be assigned to a Workspace.

- Bot Admin
- Bot Analyst
- Chat Agent
- Chat Agent Supervisor
- Chat Agent Admin

Access Designated Workspace

A user having workspace access can view the workspace dropdown next to the profile icon. This dropdown can also be used for toggling between the workspaces.


REZOLVE.Ai
HR Helpdesk
Virtual Agent Mgmt
Dashboard
Reports
Knowledge Mgmt
Supervised Learning
Taxonomy
Live Chat
DASHBOARD
Interactions
12
Question Answered
0
Size of Knowledge Base
192
System Users
12
User Interaction

End-User Notifications

Bot Admins can push notification to end-users on the mobile app or in Teams.

Working with Notifications

Access level needed

- ✓ Bot Admin

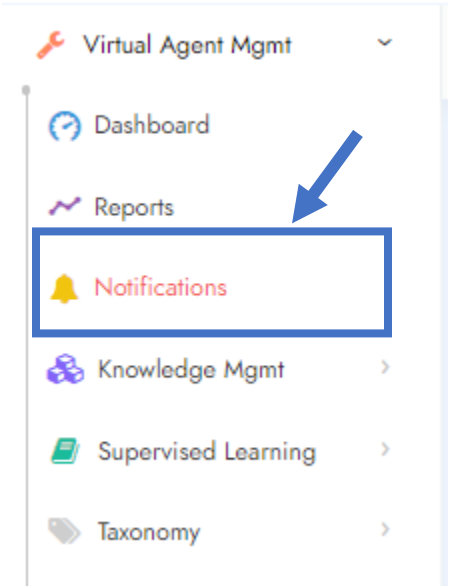
Pre-requisite

- ✓ To enable the use of this feature, please make a request to your Customer Success Manager.

Creating and Sending a Notification

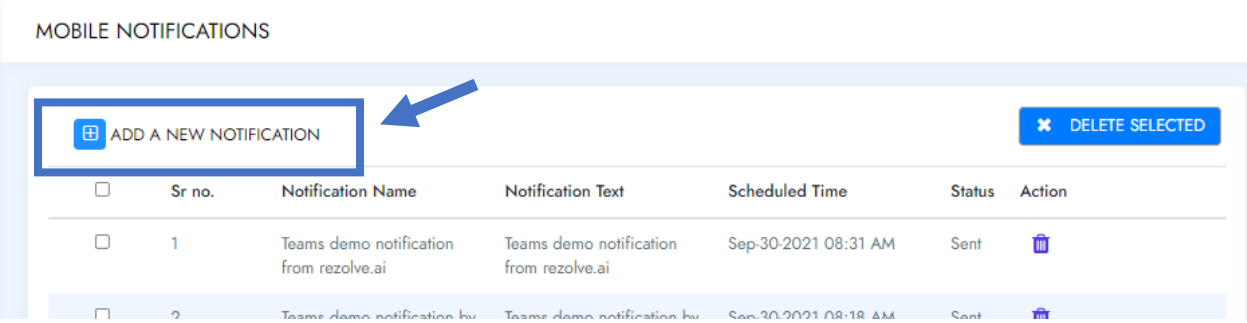
Instructions

1. In your Admin Console, Navigate to **Virtual Agent Mgmt**>**Notifications**

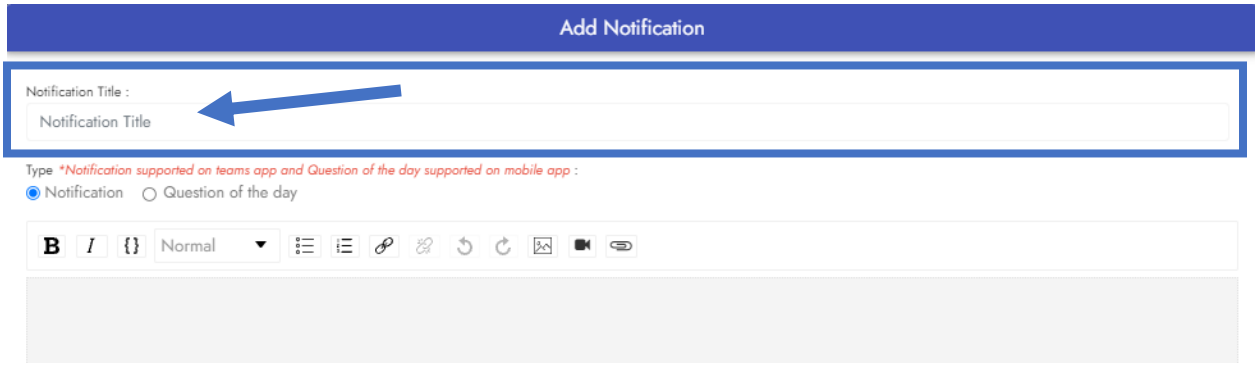


Note: If you do not see Notifications as a menu option, please speak to your Customer Success Manager.

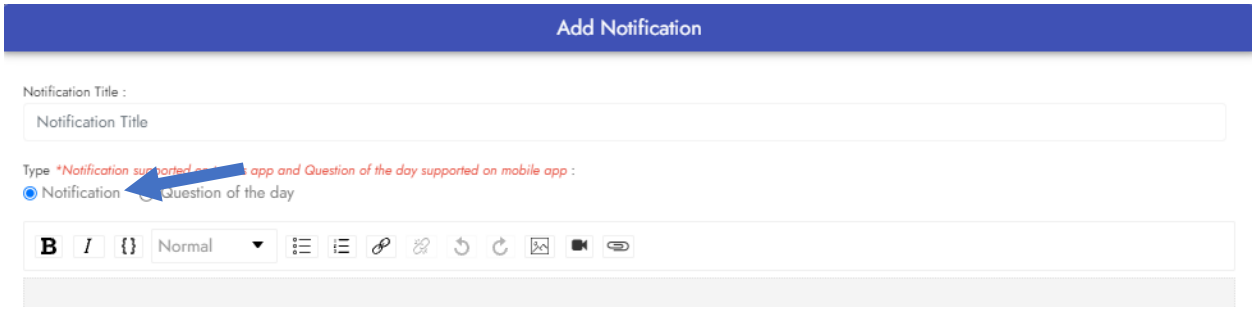
2. Click on **+ ADD A NEW NOTIFICATION**



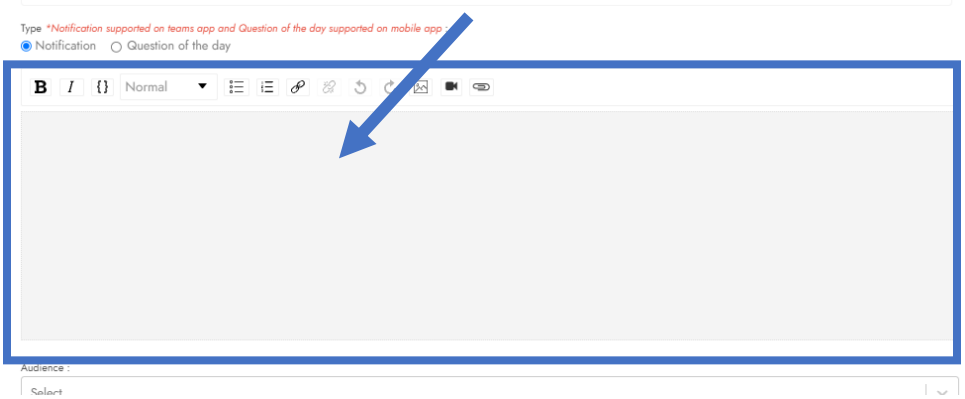
3. Give your notification a title, enter it in the *Notification Title textbox*



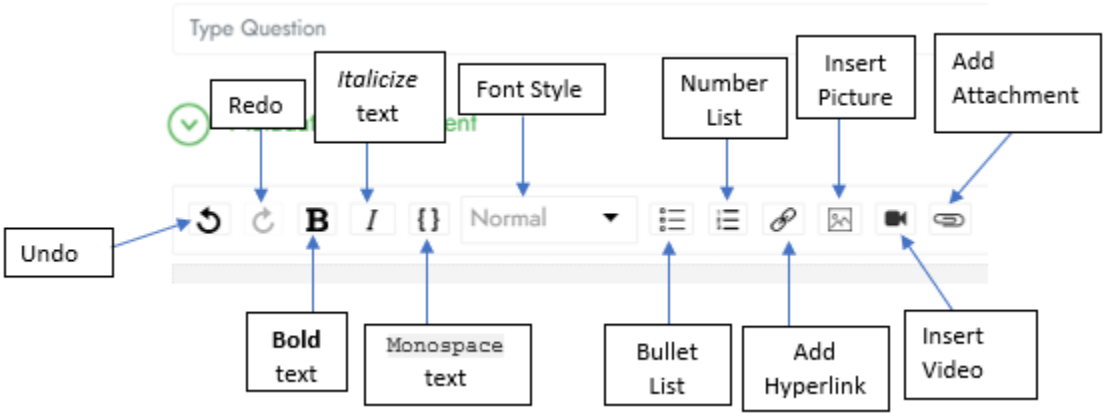
4. For Type, select *Notification* for **Teams** or *Question of the day* for **Mobile**



5. Type your message to the end-users

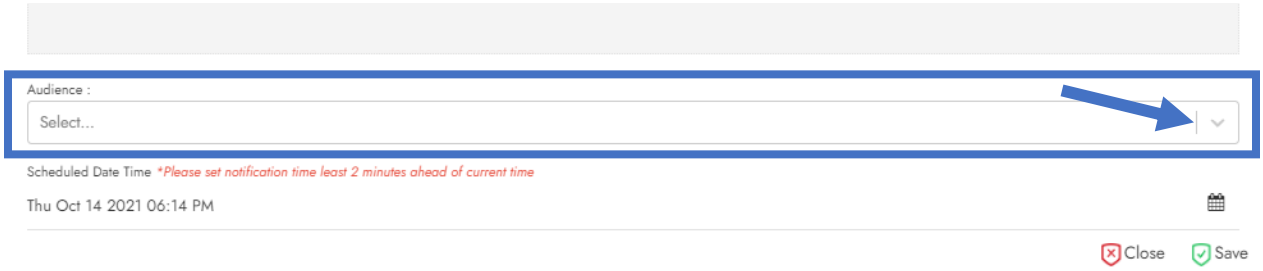


6. When creating your response/answer you can use the toolbar to format your response.



Note: Some buttons may be located in a different area but the meaning is the same.

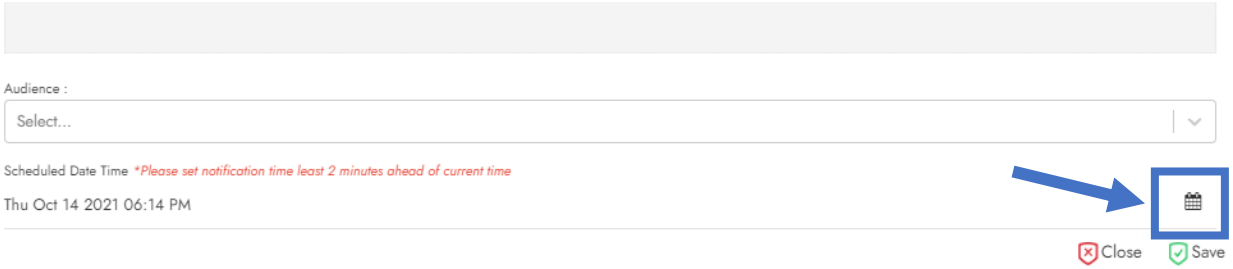
7. Select who should receive the notification, you can *Select All* or pick specific people



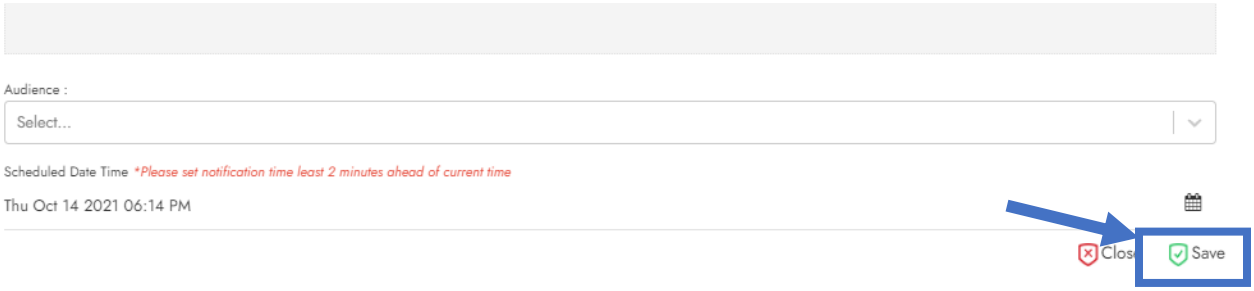
Note: If someone has not accessed the bot previously, their name will not show in the Audience list.

8. Select the date and time you would like the notification to go out

NOTE: If you want the notification to go out immediately. Set the notification date as today and the time 2 minutes from the current time on your clock.



9. Click **Save** when you are done



Updating a Notification

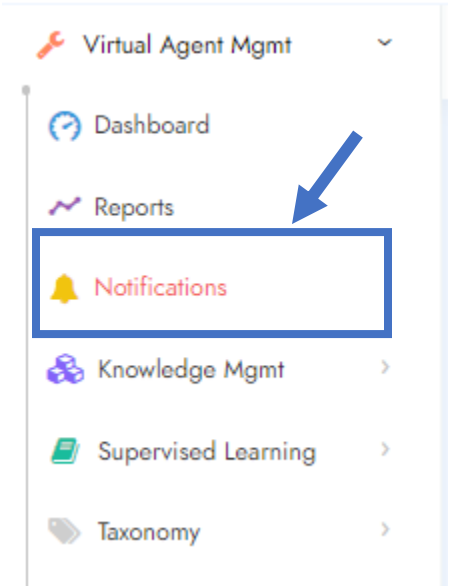
Instructions

Currently, you cannot edit an existing notification. They can only be deleted.

Deleting a Notification

Instructions

1. In your Admin Console, Navigate to **Virtual Agent Mgmt**>**Notifications**

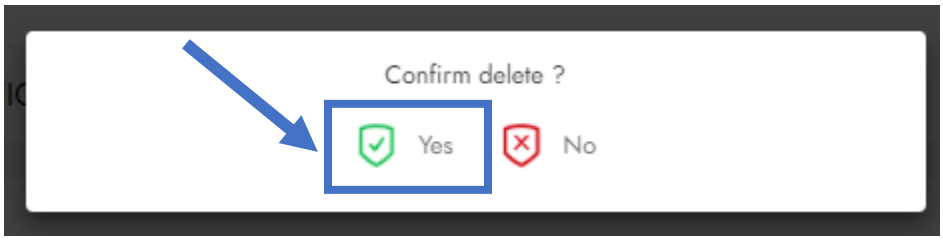


Note: If you do not see Notifications as a menu option, please speak to your Customer Success Manager.

2. From the list of all notifications, locate the one you would like deleted and click on the trash can found under the *Action* column

	Sr no.	Notification Name	Notification Text	Scheduled Time	Status	Action
☐	1	Teams demo notification from rezolve.ai	Teams demo notification from rezolve.ai	Sep-30-2021 08:31 AM	Sent	🗑
☐	2	Teams demo notification by rezolve ai	Teams demo notification by rezolve ai	Sep-30-2021 08:18 AM	Sent	🗑
☐	3	Test Notification by rezolve.ai teams	Test Notification by rezolve.ai teams	Sep-30-2021 04:18 AM	Sent	🗑
☐	4	Test 2 by Rezolve	Test 2 by Rezolve	Sep-29-2021 02:48 AM	Sent	🗑
☐	5	Test	Test	Sep-29-2021 02:39 AM	Sent	🗑

3. Click **Yes** to confirm you agree with deleting the notification



Best Practices for Training the Bot

Creating Questions

The best questions are simple. Consider the keyword or phrase for each question, then create a simple question for that keyword or phrase.

Adding more words or phrasings that are not part of the main goal of the question does not help our platform find a match.

Keep your variants reasonably different

Add relevant alternative questions

Your user may enter questions with either a conversational style of the text, “How do I add a toner cartridge to my printer?” or a keyword search such as “Toner cartridge”. The knowledge base should have both styles of questions to correctly return the best answer.

Best Practices

Sample question variants should be reasonably different.

The size of the question and answer should be restricted-not too long but should have enough keywords.

Sample variants put in must be the way different users have used to ask a particular question or report a particular issue.

Recommended way: Where is New Jersey, Location of New Jersey, How can I reach New Jersey.

Not recommended: Where is New Jersey, Where is New Jersey located.

FAQ Labels

We have a feature to label the answer with a suitable title. This helps to uniform the response and act as a smart filter when used in tickets.

Best Practices

Keep the labels neutral that best relates to the FAQ answer & sample questions.

Question variants

Where is New Jersey located, Location of New Jersey

Not recommended Answer: New Jersey is a state in the Mid-Atlantic region of the Northeastern United States. It is bordered on the north and east by the state of New York; on the east, southeast, and south by the Atlantic Ocean; on the west by the Delaware River and Pennsylvania; and on the southwest by Delaware Bay and the State of Delaware.

Recommended label: New Jersey Location

Not Recommended Label: Where is New Jersey located.

Creating Answers

Answers in BOT should not be lengthy as it makes the user scroll down which makes the user experience slightly inefficient. We should use URLs when getting some detailed answers from a separate web page and redirect users to the web page instead of copying and pasting answers into the BOT's response.

Example of using a URL for a detailed answer

New Jersey is a state in the Mid-Atlantic region of the Northeastern United States. It is bordered on the north and east by the state of New York; on the east, southeast, and south by the Atlantic Ocean; on the west by the Delaware River and Pennsylvania; and on the southwest by Delaware Bay and the State of Delaware. Check out About New Jersey & its location to find out more information.

More Ex: Visit Creating a new outlook profile to follow the troubleshooting steps.

Using a URL also helps when there is a video available on a web page and you would like to redirect the user to the page.

Best Practice

Our platform supports using formatting in an answer such as making the text bold, underline, italic. You can increase the size of the keywords. Fonts can also be changed if you want some words to stand out.

If you are inserting a URL, it is advised to use a hyperlink and give a suitable name for the URL.