

ADMIN PORTAL

Virtual Assistant Quick Start Guide



Version 5

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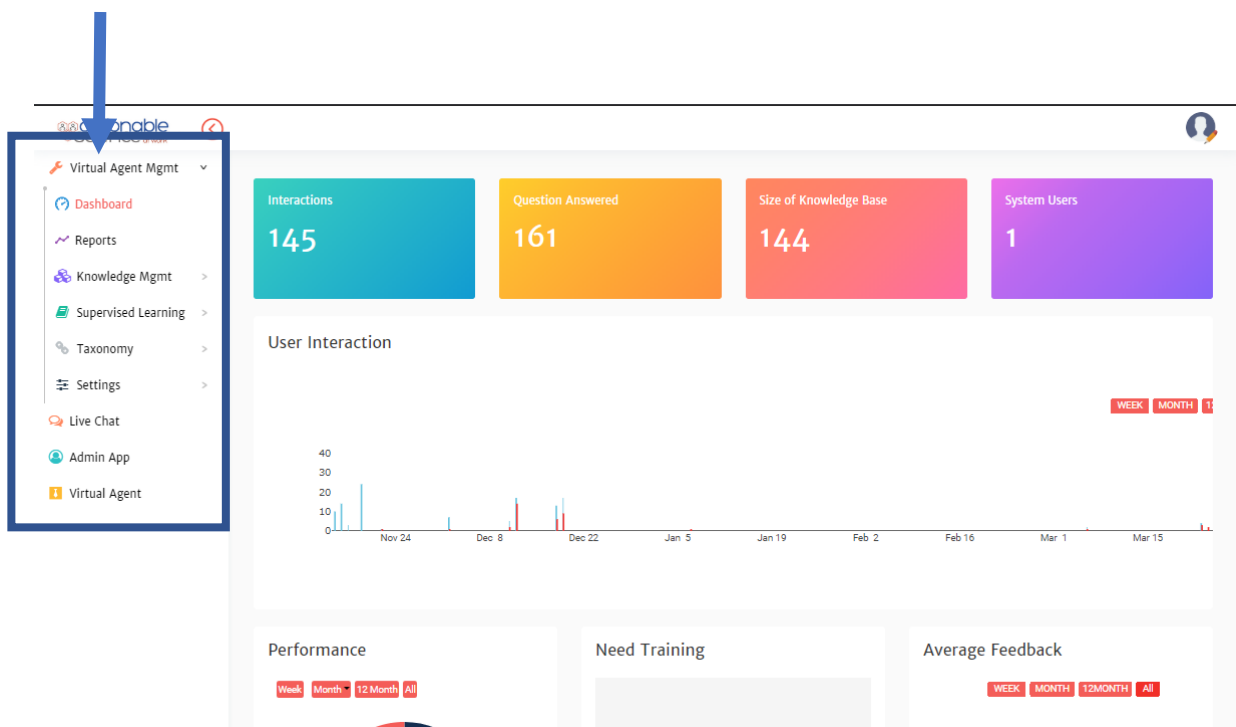
Getting Started

Welcome to your Admin Portal!!! In this manual, we will take a quick look at the various Admin task an Admin will have to complete.

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.



User Management

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

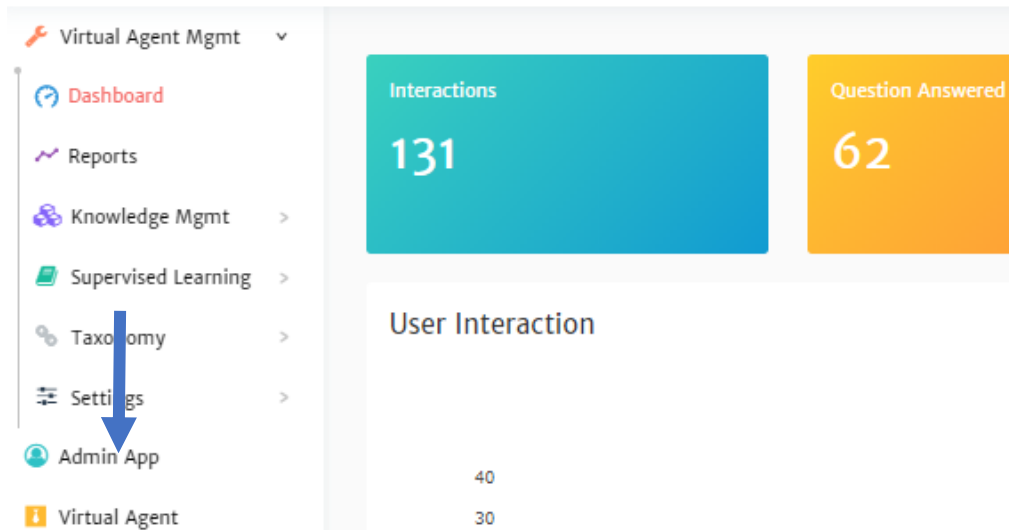
Virtual Agent Roles

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 (ie. 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.
Ticketing User	Live chat	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.
Ticketing Agent	Ticket Mgmt	Provide access to My Tickets	This role allows an agent to see tickets raised by users.

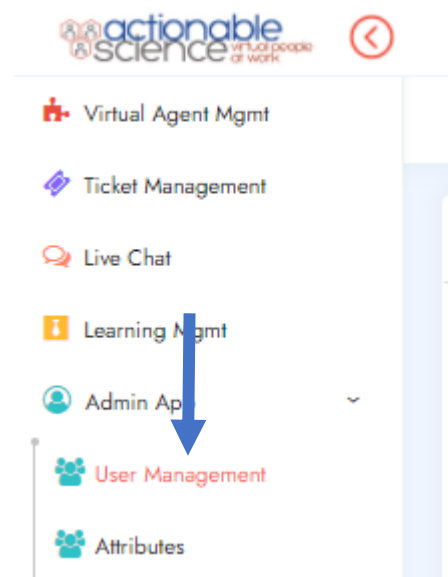
NOTE: Users are advised to logout and re-login to the system for new roles to take effect.

Creating a User Account

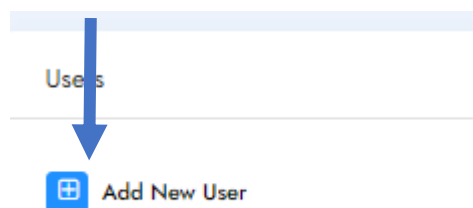
1. Click on **Admin App** in the navigation pane on the left of your console



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. Username – we recommend that you place the person's email address
 - B. Email Address
 - C. First Name
 - D. Last Name

Create User

User Name

Username

Email

Email

First Name

First Name

Last Name

Last name

Roles

--select Roles--

Status

--select Status--

User Attributes

--Select Attributes--

Create

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

USER MANAGEMENT

[Back to List](#)

Create User

User Name

Username

Email

Email

First Name

First Name

Last Name

Last name

Roles

--select Roles--

Status

--select Status--

User Attributes

--Select Attributes--

Create

6. Select the relevant role for this user (*Click outside the Role menu option box to close it*)

NOTES: If you click twice, it will remove the role.

- **Bot Analyst** - Allows a user to all sections of the *Virtual Agent Mgmt* section except Bot Settings (ie. Access to Manage QA, Supervised Learning, Taxonomy)
- **User Admin** Able to create users.
- **Bot Admin** - Allows a user to all sections of the *Virtual Agent Mgmt* section including Bot Settings
- **Chat Agent Admin** - (Only used if there is an associated agent chat with a queue)
Gives a view live chat settings page with, ability to configure queues and assigned agents.
- **Bot User** - Access to view and use Bot app.
- **Chat Agent** - Provide a user Agent access for live chat.

7. Set relevant attributes
8. Click the + for it to be added
9. Click on **Create**

USER MANAGEMENT

Back to List

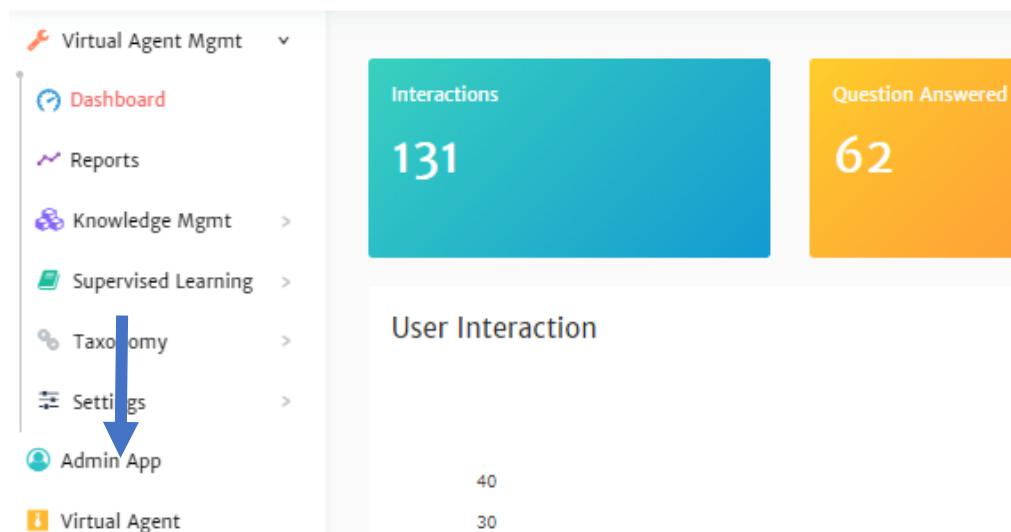
Create User

User Name	<input type="text" value="Username"/>
Email	<input type="text" value="Email"/>
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last name"/>
Roles	<input type="text" value="--select Roles--"/>
Status	<input type="text" value="--select Status--"/>
User Attributes	<input type="text" value="--Select Attributes--"/>

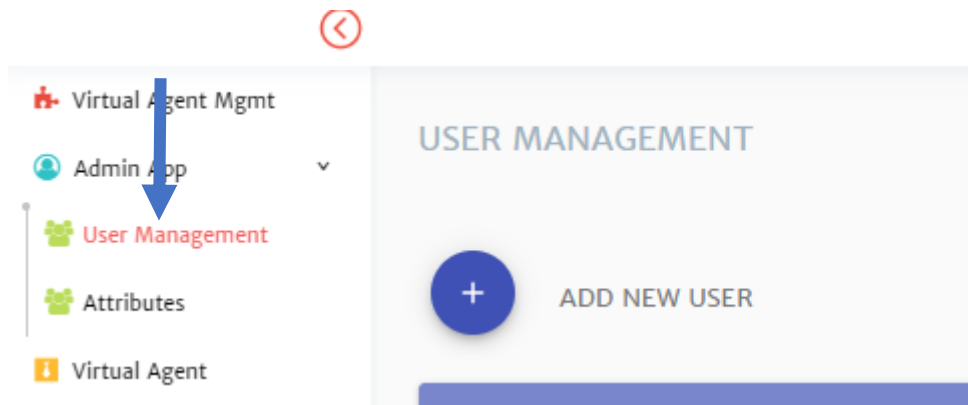
Create

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

Users Q ↺

Add New User

Hide Fields Import

User Name	First Name	Last Name	Email	Roles	Attributes	Status	actions
adminuser	Asc	Admin	sahil.sharma@actionable-science.com	<div>ASC Admin</div> <div>Tenant Admin</div>	Apply Content Restriction: Support User	Active	View

4. A new page will open and you can edit

- User Name
- First Name
- Last Name
- Email
- 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 on the checkmark to Save

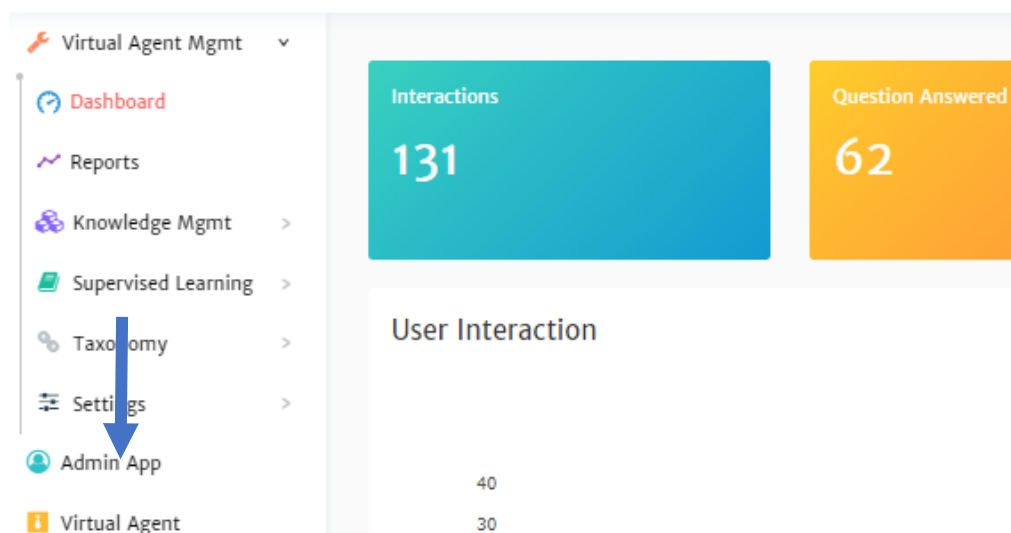


User Name	adminuser	Update
Email	<input type="text" value="sahil.sharma@actionable-science.com"/>	
First Name	<input type="text" value="Asc"/>	
Last Name	<input type="text" value="Admin"/>	
Roles	<input type="text" value="Bot User x Tenant Admin x"/>	
Status	<input type="text" value="Active"/>	
User Attributes	<input type="text" value="Apply Content Restriction"/>	
	<input type="text" value="Support User"/>	<input type="button" value="Add"/>
	<input type="text" value="Apply Content Restriction: Support User x"/>	

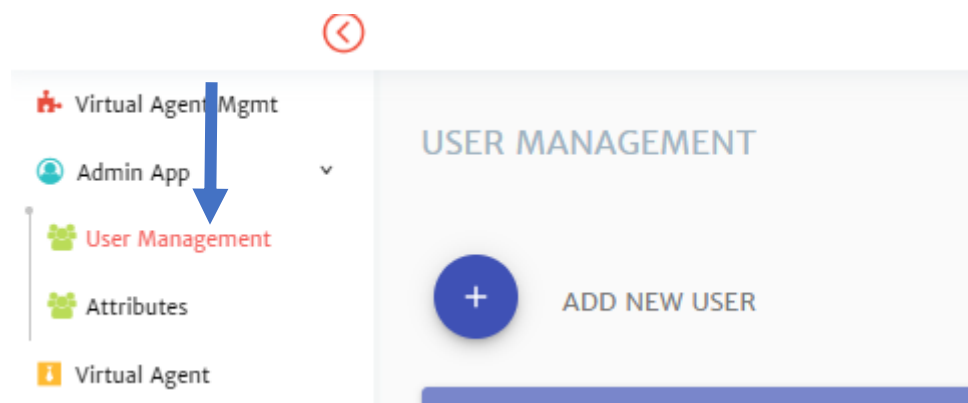
Activate and Deactivate an Account

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

Users Q ↺

[Add New User](#)

Hide Fields ▼ Import

User Name	First Name	Last Name	Email	Roles	Attributes	Status	actions
adminuser	Asc	Admin	sahil.sharma@actionable-science.com	ASC Admin Tenant Admin	Apply Content Restriction: Support User	Active	View

4. Go to the Status field

Update User

User Name: adminuser [Update](#)

Email:

First Name:

Last Name:

Roles:

Status:

User Attributes:

5. Click on the current Status selection box

Update User

User Name: adminuser [Update](#)

Email:

First Name:

Last Name:

Roles:

Status:

User Attributes:

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

Update User

User Name: adminuser

Email: sahil.sharma@actionable-science.com

First Name: Asc

Last Name: Admin

Roles: Tenant Admin x

Status: Active

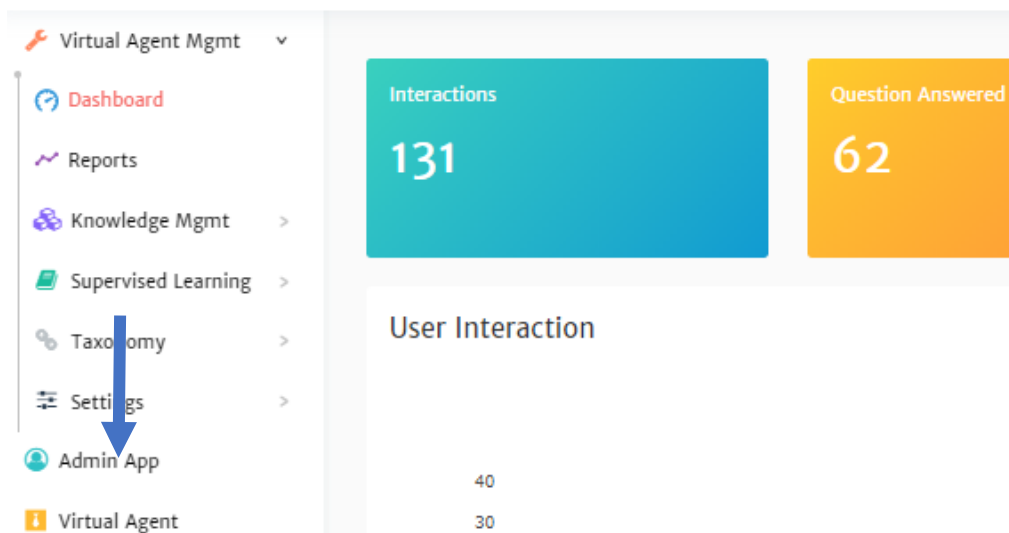
User Attributes: --Select Attributes--

Apply Content Restriction: Support User x

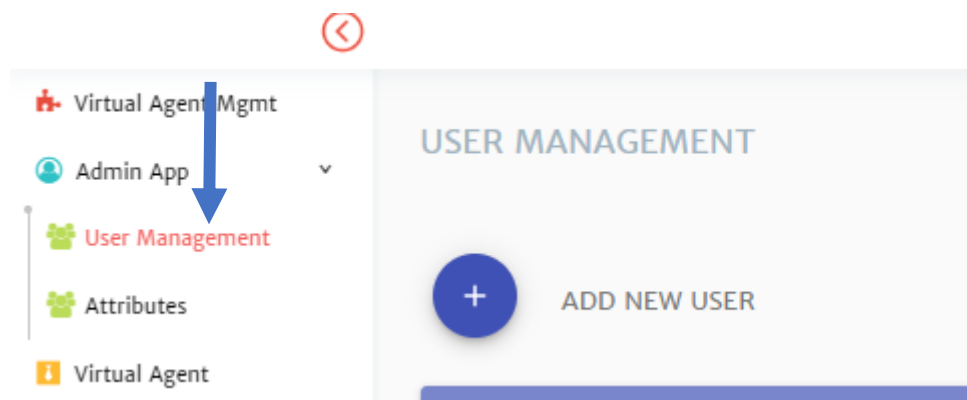
Update

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

Hide Fields

Import

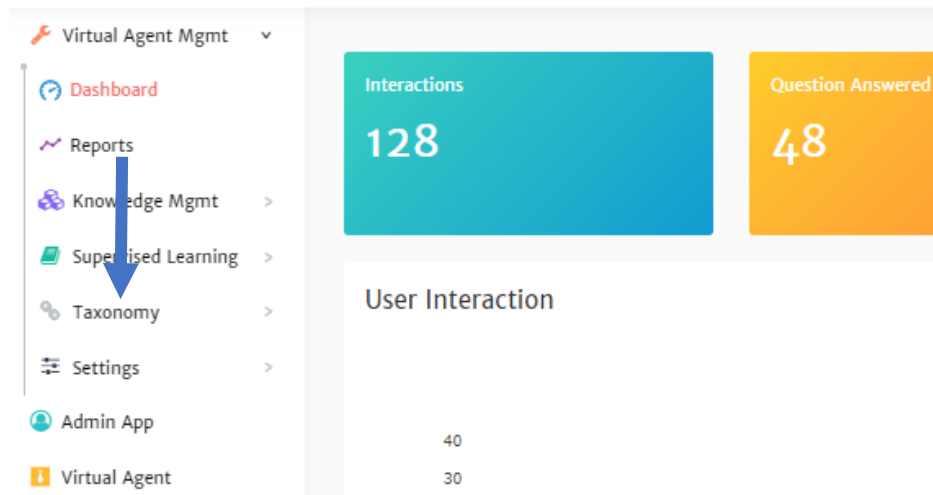
User Name	First Name	Last Name	Email	Roles	Attributes	Status	Actions
aanchal grover	Aanchal	Grover	aanchal.grover@actionable-science.com	Ticket Agent Bot User	N/A	Active	 View

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.

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, Hierarchical tags and Simple tags.



Hierarchy Tags

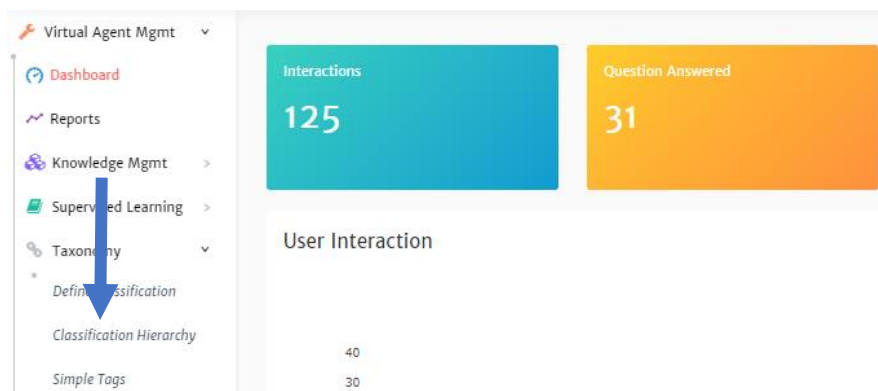
Hierarchy tags are used to define and categorize the bulk of a knowledge base.

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 +

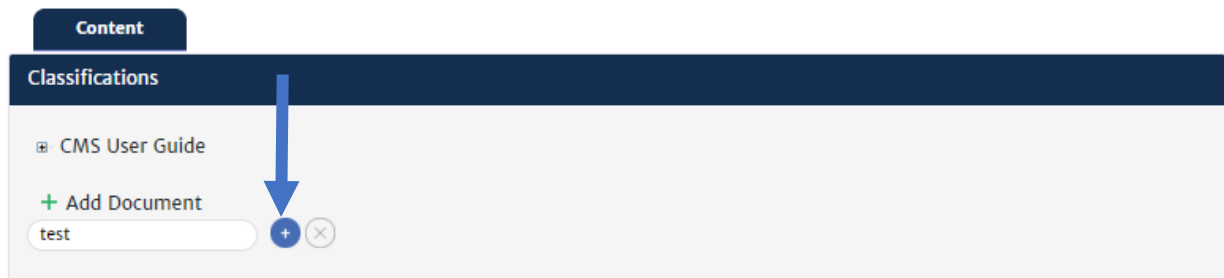
Classification Hierarchy



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

Classification Hierarchy



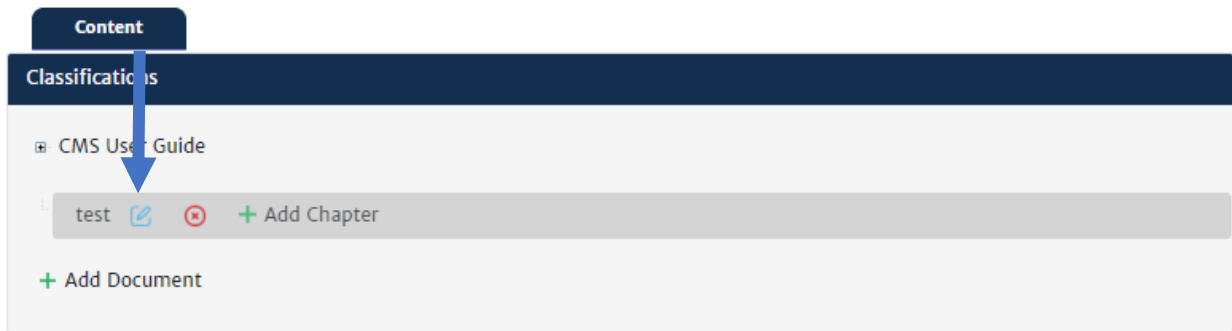
6. This category will now show in the list. You will repeat the above steps to create any additional Level 1 tags.
 - If you have created multiple levels you will see a green + next to *Add (Label Name of Level 2)*. Click the green + to add your sub-tag.
 - If you would like to add multiple sub-categories, 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.

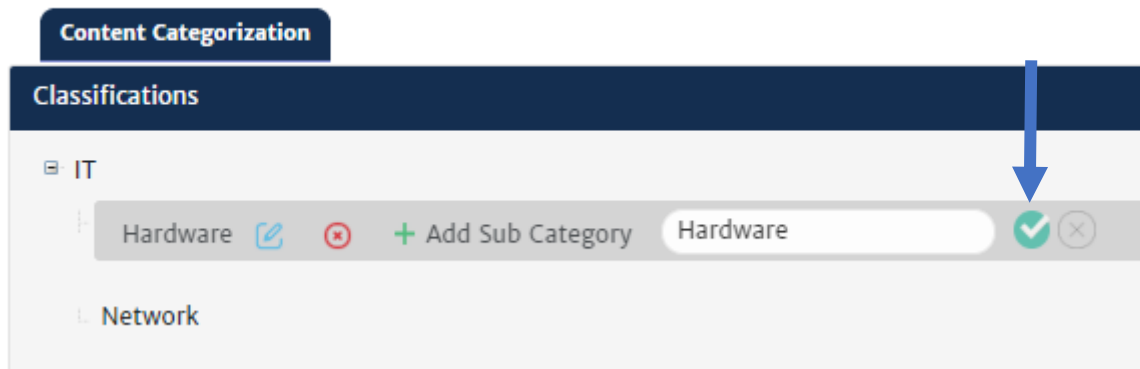
1. Click **Taxonomy** in the navigation pane on the left of your console
2. Click **Classification Hierarchy** in the navigation pane on the left of your console
3. Highlight the tag you would like to edit
4. Click the pencil icon next to it

Classification Hierarchy



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

Classification Hierarchy



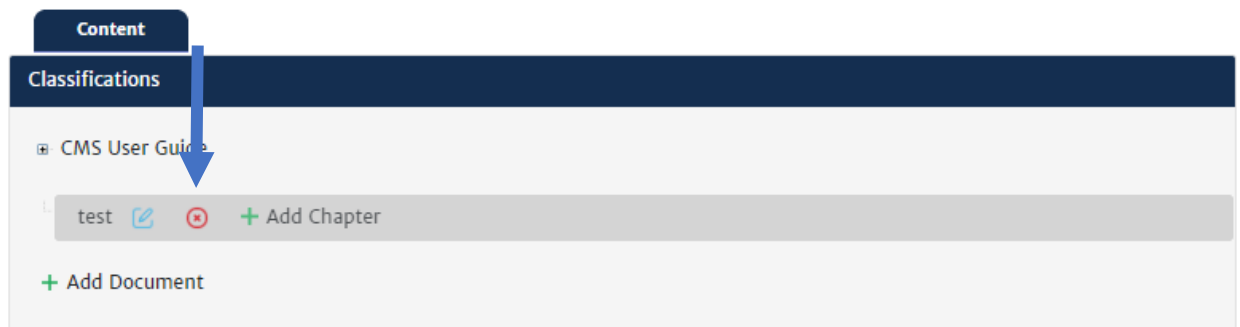
The system will start applying the change when complete you will see a Successful message.

Delete a Hierarchial tag

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

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 remove
4. Click the **X** next to it

Classification Hierarchy



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.

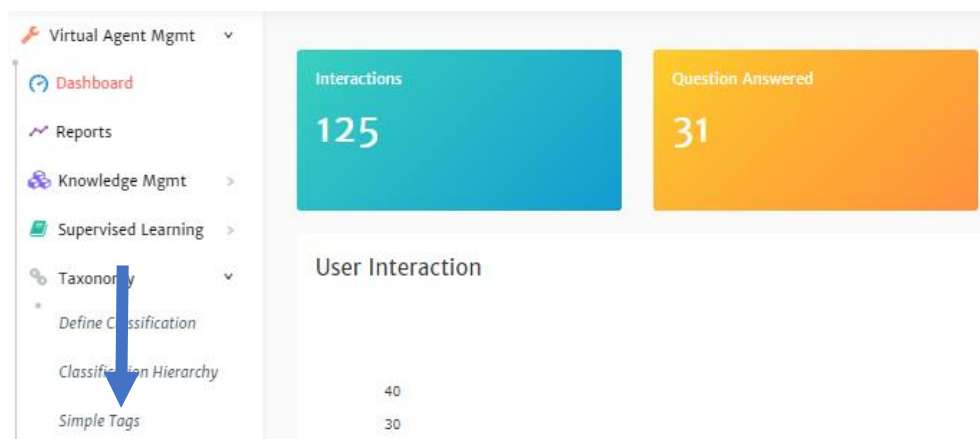
This is a two-part process. You must first create your Metadata and then add values to it. Think of the Metadata as a title that explains the values.

NOTE: Actionable Science supports up to 4 Simple tags.

Create a simple tag

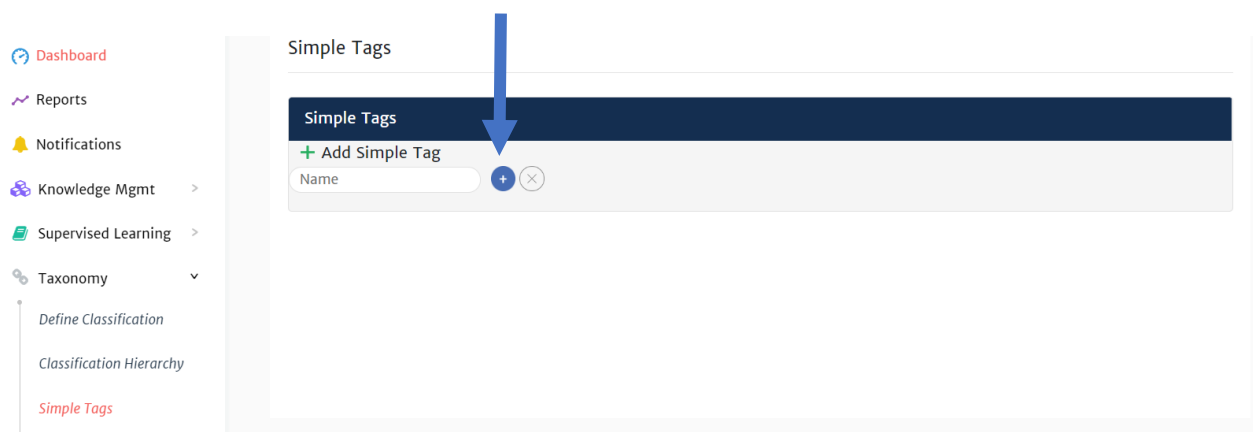
Creating the Metadata

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

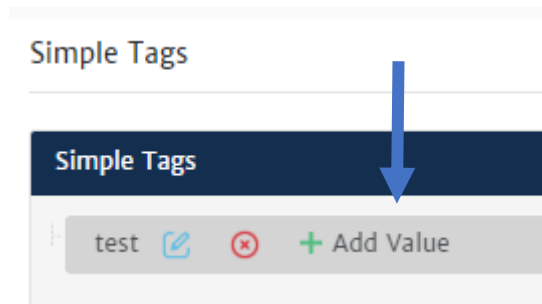
NOTE: If you click the X instead this will cancel adding the simple tag.



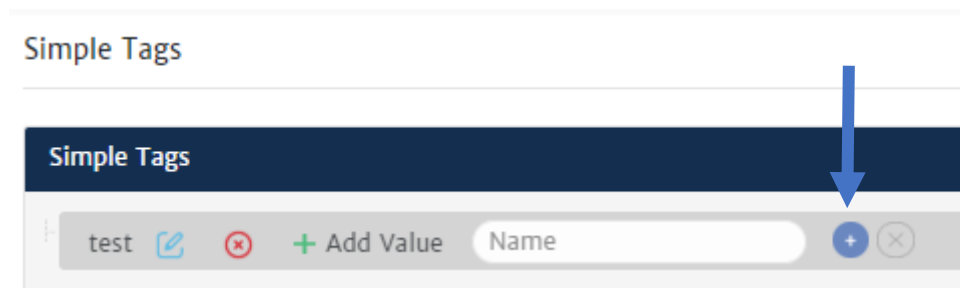
Adding Values to a Simple Tag Metadata

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



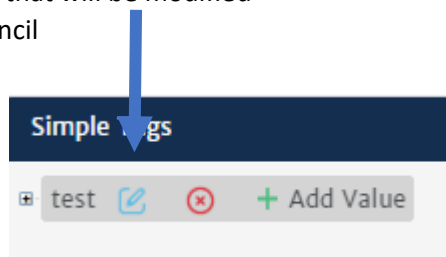
You may start adding this Simple Tag to dialogues.

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.

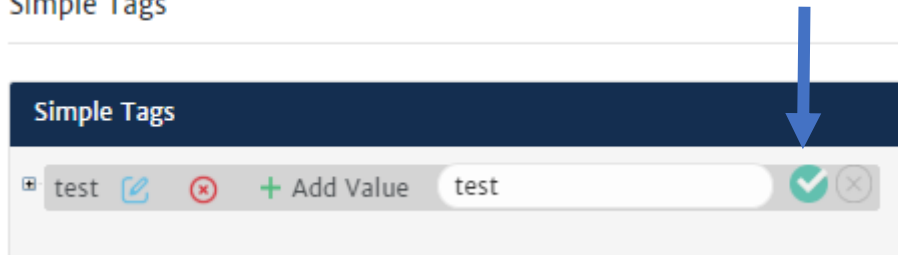
Modifying the Metadata

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

Simple Tags

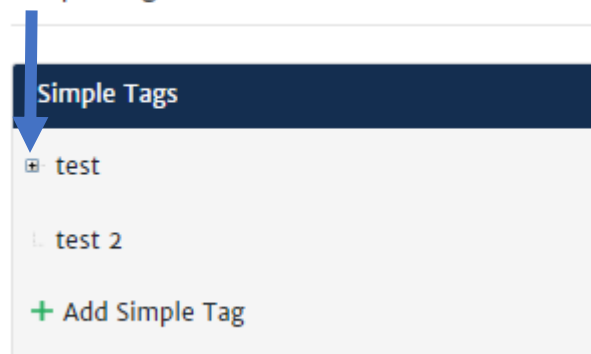


Your changes have been saved.

Modifying the Values of a Simple Tag Metadata

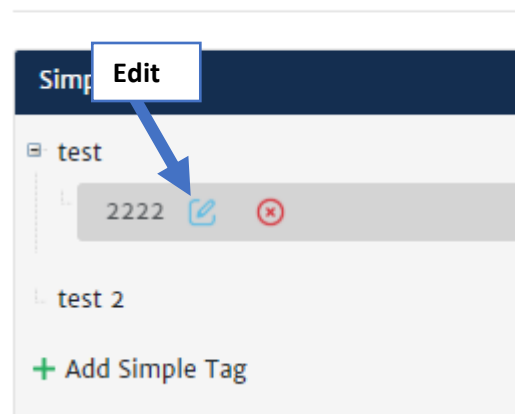
1. Click on + in front of Simple tag Metadata that a Value will be edited

Simple Tags



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

Simple Tags



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

Simple Tags

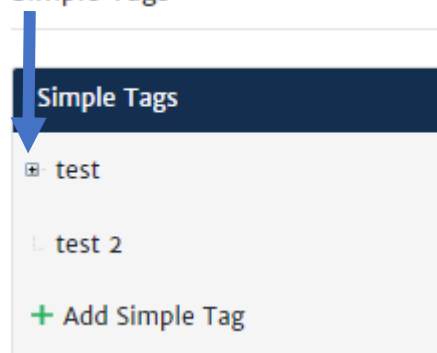


Deleting the Values from a Simple Tag Metadata

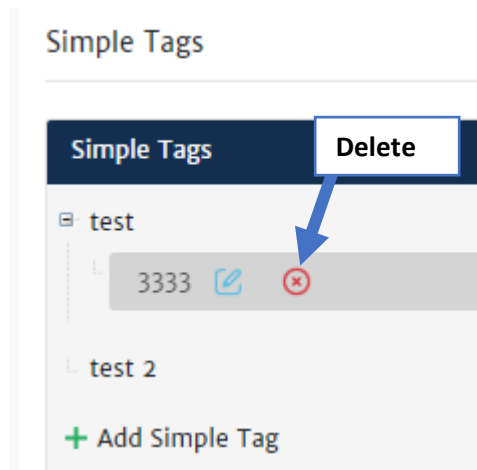
The Simple tag of the Value that will be deleted, must be removed from all dialogues that it is tagged on before removing it.

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

Simple Tags



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

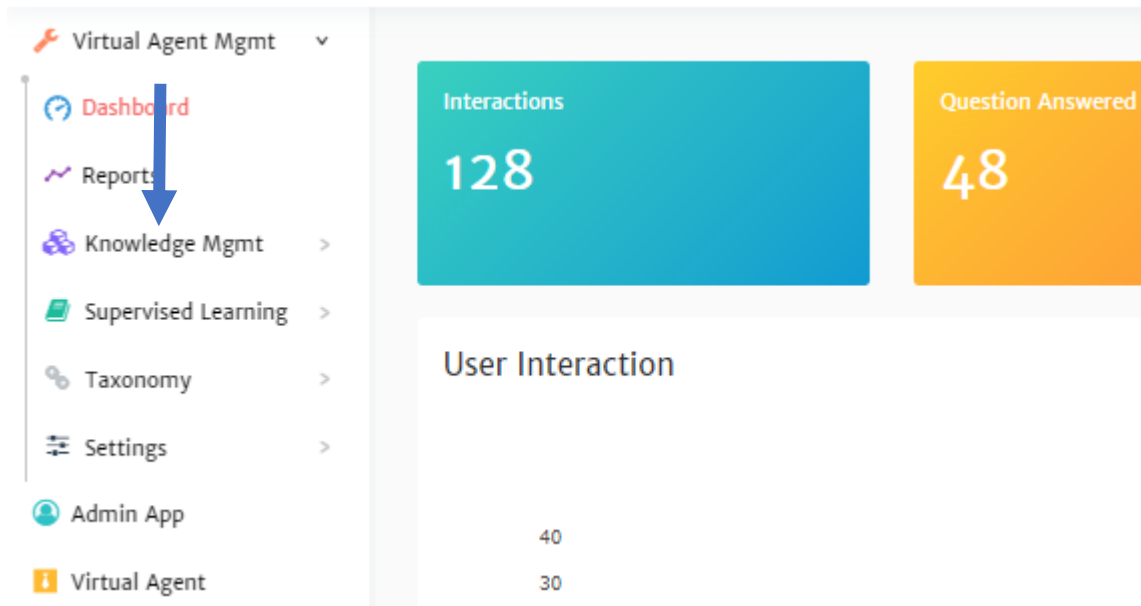


The value is now removed.

Virtual Agent Management

This is the section used to maintaining the Virtual Assistant FAQ and Training.

Knowledge Mgmt



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

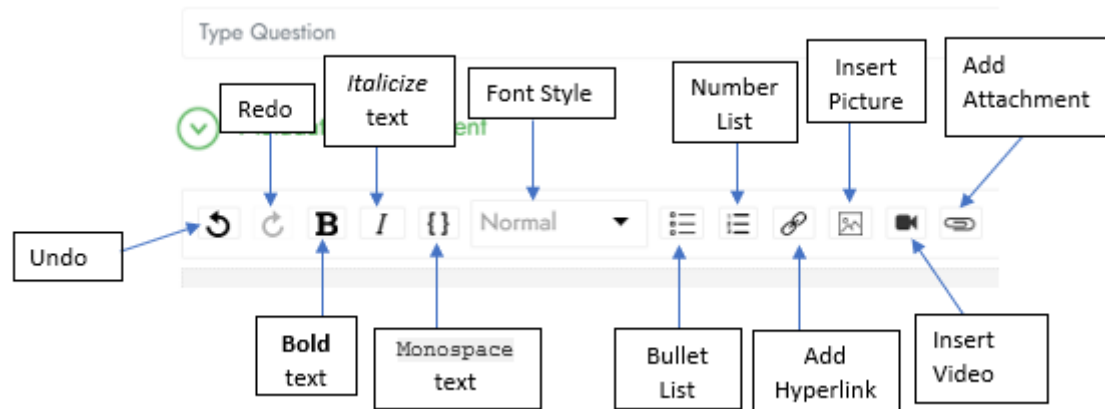
The screenshot shows the 'Add New Q&A' form. It has a blue header bar with the text 'Add New Q&A'. Below the header is a text input field labeled 'Type Question'. To the left of this field is a box labeled 'Question' with an arrow pointing to the input field. Below the 'Type Question' field is a section labeled 'Metadata Management' with a green checkmark icon. To the left of this section is a box labeled 'Tags' with an arrow pointing to the 'Metadata Management' section. Below the 'Metadata Management' section is a large text area for the answer. To the left of this text area is a box labeled 'Answer' with an arrow pointing to the text area. At the bottom of the form is a section labeled 'Add Step' with a dropdown menu set to 'Next'. At the bottom right of the form are two buttons: 'Close' and 'Save'.

5. 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 for 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

6. Type the response/answer in the answer box

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



8. Click **Save** when complete.

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
4. Click on the icon that looks like a pencil, too open the Text Editor and make changes.



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

Finding a Specific Simple Dialogue

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

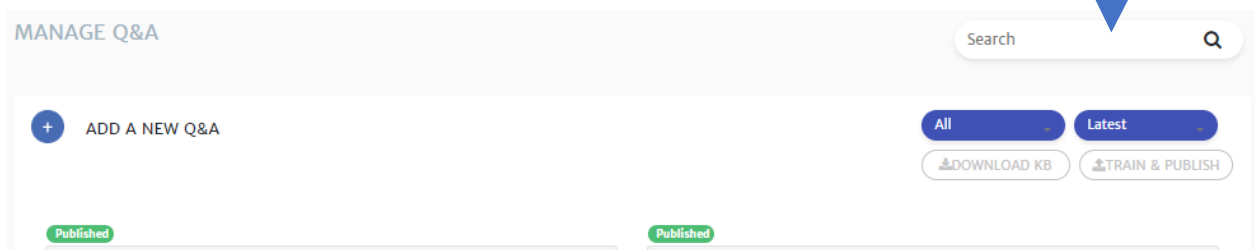
- Using keywords or phrases
- Tag Filter
- Using Other Filters

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

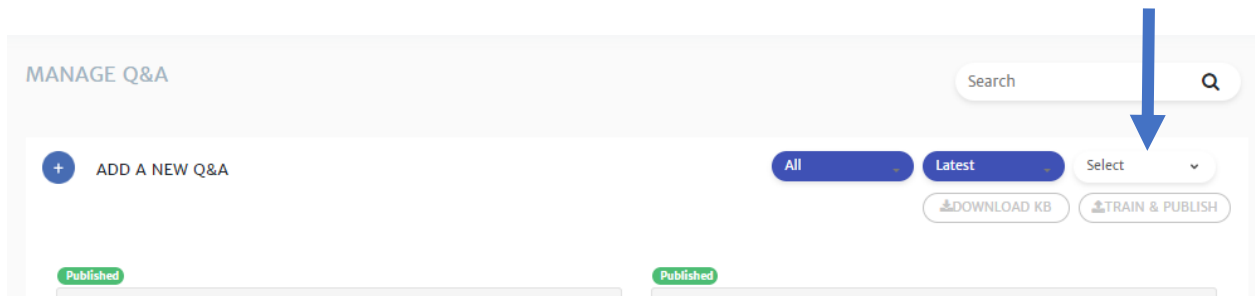


4. Press enter or click the magnifying glass in the search box

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



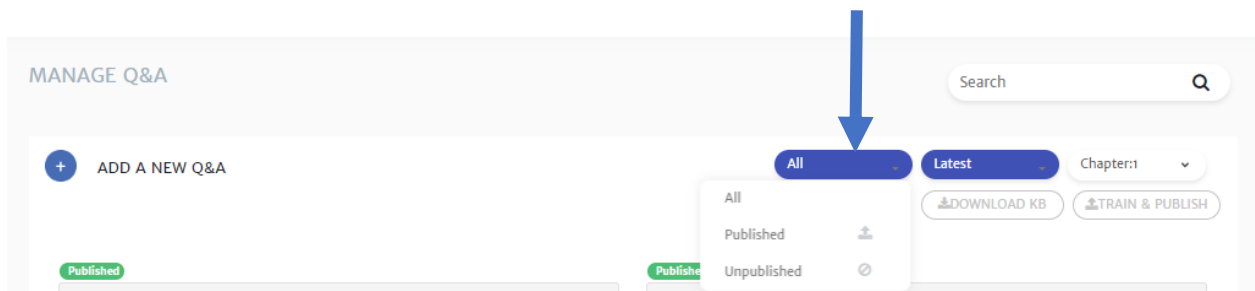
4. Scroll through the list for the tag or tags you would like to see and click on the box next to it

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

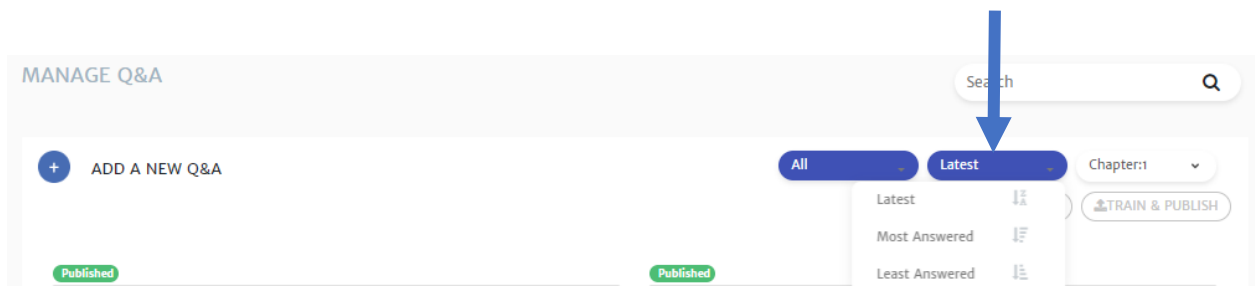
Using Other Filters

There are two other types of filters available:

- Publish status



- Latest, Most answered or Least answered



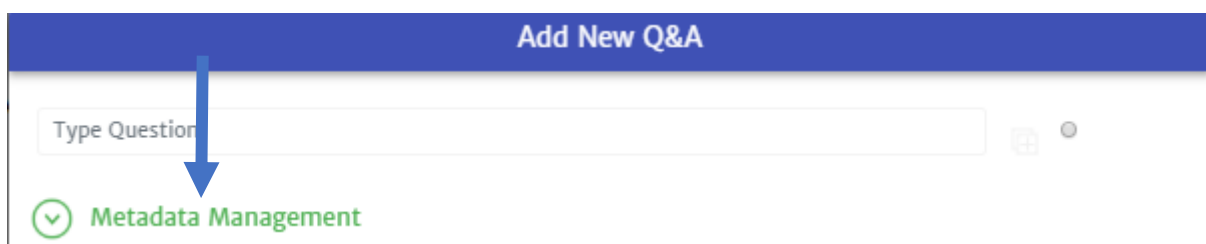
1. Select the filter you like
2. View the results

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](#).

Adding Hierarchical and Simple Tags

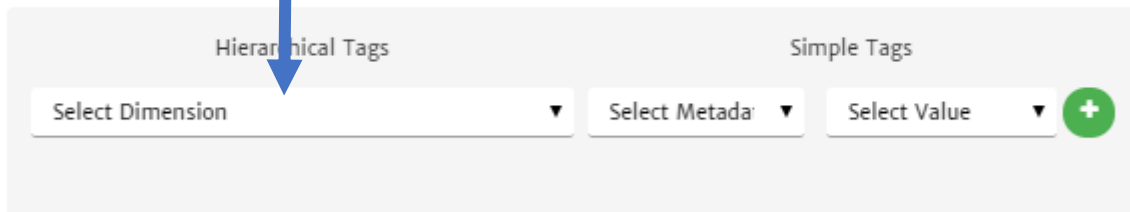
To add the tags you created:

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.

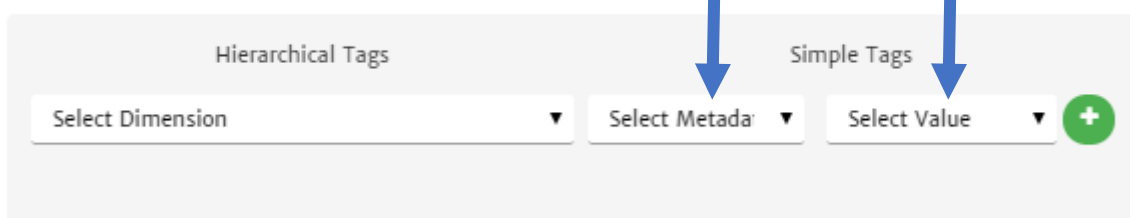
Metadata Management



The screenshot shows the 'Metadata Management' interface. Under the 'Hierarchical Tags' section, there is a dropdown menu labeled 'Select Dimension'. A blue arrow points to this dropdown. To the right, under the 'Simple Tags' section, there are two more dropdowns: 'Select Metadata' and 'Select Value', followed by a green circular button with a white plus sign.

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

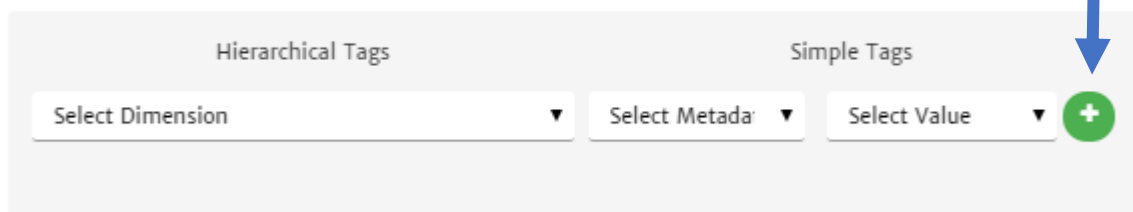
Metadata Management



The screenshot shows the 'Metadata Management' interface. Under the 'Simple Tags' section, there are two dropdown menus: 'Select Metadata' and 'Select Value'. Two blue arrows point to these dropdowns. To the right of these dropdowns is a green circular button with a white plus sign.

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

Metadata Management



The screenshot shows the 'Metadata Management' interface. Under the 'Simple Tags' section, there is a green circular button with a white plus sign. A blue arrow points to this button.

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



Add New Q&A

Type Question

Metadata Management

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

Add New Q&A

Test

Type Question

Metadata Management

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

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

Add New Q&A

Test

Type Question

Metadata Management

Supervised Learning

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

The screenshot shows the 'Supervised Learning' console with the 'Train' tab selected. A table lists failed utterances with columns: Select, User, Attributes, Failed Date/Time, User Question, and action buttons (Q&A, Smalltalk). Annotations point to various parts of the interface:

- View the full conversation here**: Points to the 'View Chat' link in the 'Select' column.
- Question posted by user**: Points to the 'User Question' column.
- Tag any utterance to any existing question**: Points to the 'Q&A' button.
- Tag any utterance to any existing small talk**: Points to the 'Smalltalk' button.
- Date when the utterance failed.**: Points to the 'Failed Date/Time' column.
- User who asked the question**: Points to the 'User' column.
- Remove failed utterance from list, no action required**: Points to the red 'X' icon next to the last row.

Select	User	Attributes	Failed Date/Time	User Question	Q&A	Smalltalk
<input type="checkbox"/> View Chat	sporuri	N/A	Apr-03-2020 03:59:23 PM -04	how do i add url of a webpage to my report		
<input type="checkbox"/> View Chat	sporuri	N/A	Apr-03-2020 03:54:06 PM -04	footnotes in cms		
<input type="checkbox"/> View Chat	sporuri	N/A	Apr-03-2020 03:48:11 PM -04	how can i hide end notes		
<input type="checkbox"/> View Chat	sporuri	N/A	Apr-03-2020 03:44:34 PM -04	how can i ensure adherence to mis styles		

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 detail the beginning of the same utterance

The screenshot shows the 'FAILED OR UNRECOGNIZED USER QUESTIONS' search and filter interface. Annotations point to various search and filter options:

- Search by user or question**: Points to the search bar.
- Filter by user, question or fail date and time**: Points to the 'Filter' dropdown menu.
- Filter by Train Queue**: Points to the 'Filter by Queue' dropdown menu.

Buttons include 'DELETE SELECTED' and 'Assign Queue'.

4. If the failed utterance:

- Needs to be tagged/added to an existing dialogue click on Q&A or SmallTalk (whichever is relevant)
 - A. Enter a keyword or phrase into the search box
 - B. Select the correct dialogue
 - C. Click **Save**

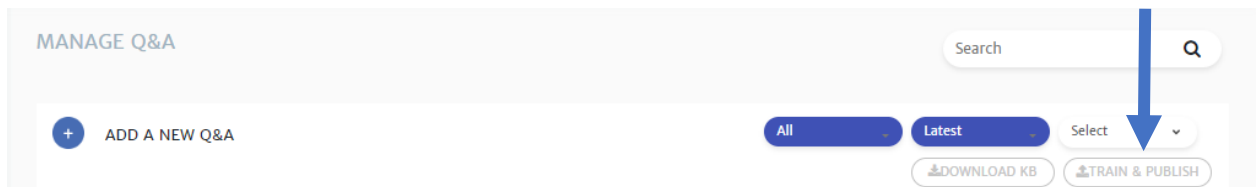
1. If you need to create a new Q&A dialogue or Small Talk

- A. Click on **New Answer**
- B. The Text Editor box will appear
- C. Create dialogue as usual
- D. Click **Save**

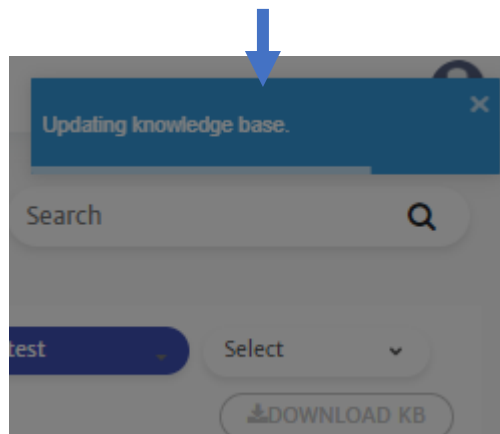
Publishing to Live Environment

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.

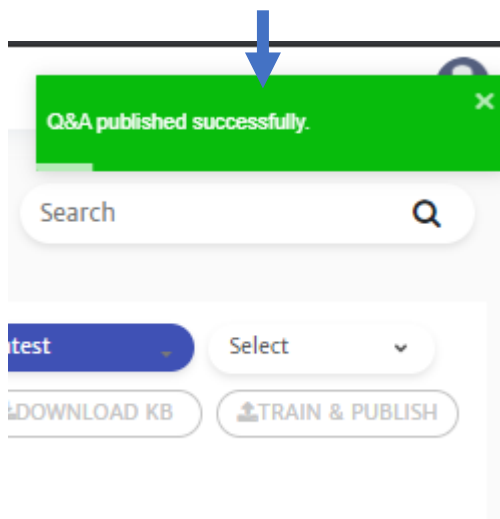
In the various Knowledge MGMT sections (Mange Q&A, SmallTalk and Mange Task) under the search filters, there is the Train & Publish button.



1. Click on **Train & Publish** button
2. When the update starts you will see the following message:



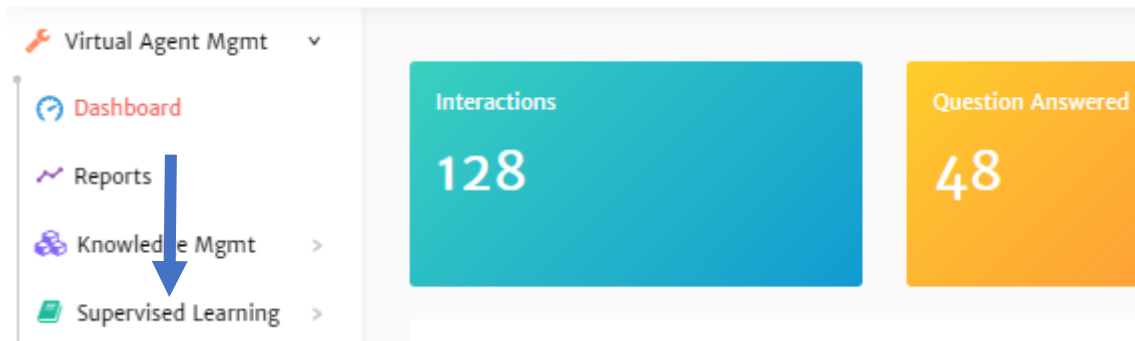
3. When complete you will see the following message:



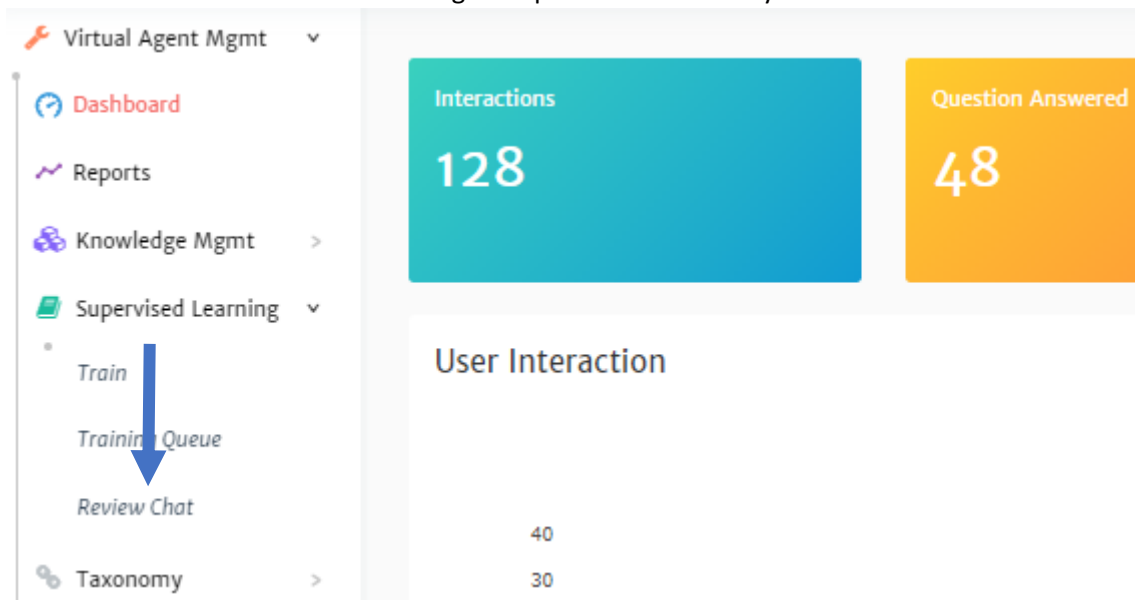
The new dialogues and changes are now visible to the users.

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

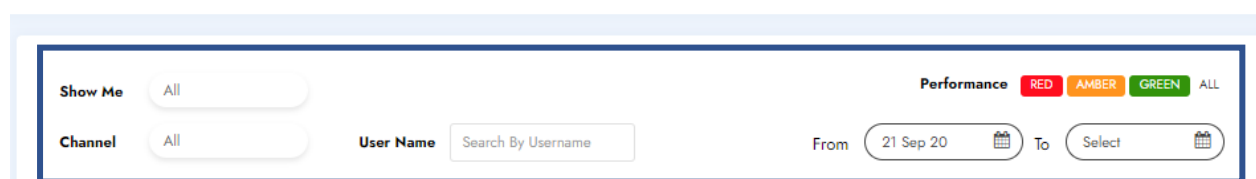


1. Click on **Supervised Learning** in the navigation pane on the left of your console
2. Click on **Review Chat** in the navigation pane on the left of your console



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

REVIEW CHAT



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

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains the following menu items: Notifications, Knowledge Mgmt, Supervised Learning (with a dropdown arrow), Train, Training Queue, Review Chat (highlighted in red), Taxonomy, Settings, Bot Configuration, Audit Config, Admin App, and Logout. The main content area displays a table with chat records. Each record has columns for User name, Attributes, Chat duration, Date, Rating, Performance, and Action. The 'Action' column contains an eye icon and a toggle switch. Two callout boxes with arrows point to these elements: one points to the eye icon with the text 'View conversation here', and the other points to the toggle switch with the text 'Bookmark, for further action'.

User name	Attributes	Chat duration	Date	Rating	Performance	Action
Anonymous	N/A	00:9:56	Dec-27-2019 06:59:17 PM IST	NA	<div><div></div></div>	
Anonymous	N/A	00:10:13	Dec-27-2019 06:40:24 PM IST	NA	<div><div></div></div>	
Anonymous	N/A	00:10:2	Dec-27-2019 06:36:40 PM IST	NA	<div><div></div></div>	
Anonymous	N/A	00:9:52	Dec-27-2019 06:35:28 PM IST	NA	<div><div></div></div>	
Anonymous	N/A					

Reports

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

There are currently four reports are available.

- *Unrecognized Utterances* - All utterances for which 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.

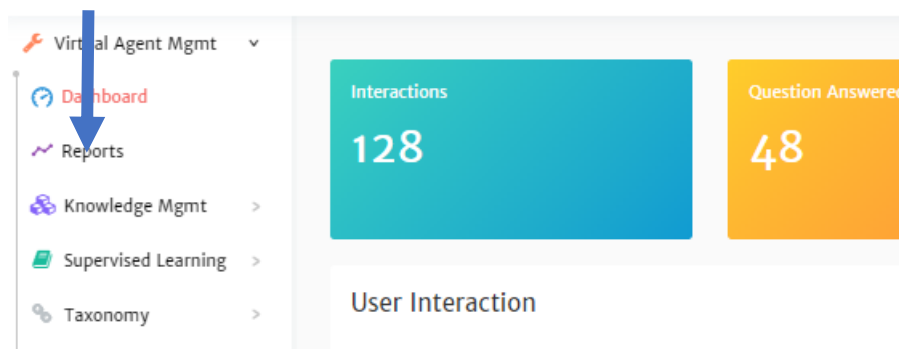
- *User Feedback*- Feedback provided by users about the experience with the Bot.
- *Chat Sessions* - All the instances created for James.

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

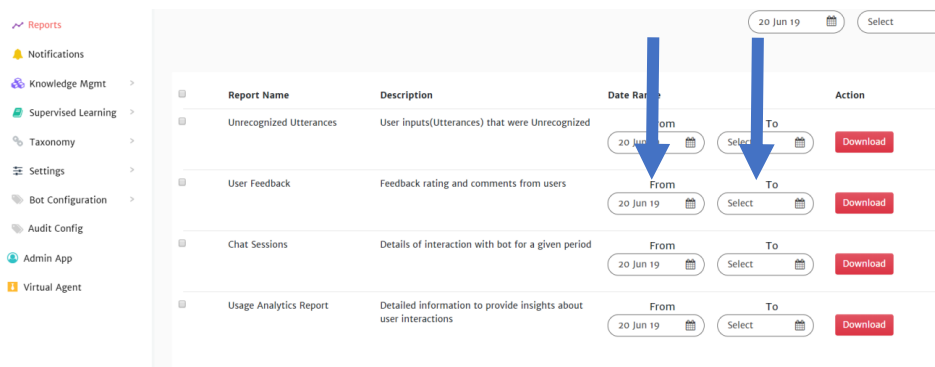
- *Usage Analytics* - Insight about every question, whether it was helpful or not.
- *Ticket Details* – Basic information on the tickets raised by the chatbot. Including ticket number, user id/email, team ticket assigned to, category, subcategory and status at the time of creation.
- *CSAT* – Looks at 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**

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains the following menu items: Reports (highlighted in red), Notifications, Knowledge Mgmt, Supervised Learning, Taxonomy, Settings, Bot Configuration, Audit Config, Admin App, and Virtual Agent. The main content area displays a table of reports. At the top right of the main area, there are date filters: '20 Jun 19' and 'Select'. A blue arrow points from the 'Select' filter down to the 'Download' button of the first report row.

<input type="checkbox"/>	Report Name	Description	Date Range		Action
			From	To	
<input type="checkbox"/>	Unrecognized Utterances	User inputs(Utterances) that were Unrecognized	20 Jun 19	Select	Download
<input type="checkbox"/>	User Feedback	Feedback rating and comments from users	20 Jun 19	Select	Download
<input type="checkbox"/>	Chat Sessions	Details of interaction with bot for a given period	20 Jun 19	Select	Download
<input type="checkbox"/>	Usage Analytics Report	Detailed information to provide insights about user interactions	20 Jun 19	Select	Download

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

Ticket Mgmt

MY TICKETS

SCORE CARDS

My Response SLA: Queue Response SLA: My Resolution SLA: Queue Resolution SLA:

Queue Name:

+ CREATE TICKET

My Queues - Assigned (5) My Queues - Unassigned (24) Submitted by me (331) My Queues - All (59)

Ticket #	Submitted On	From	Subject	Status	Domain	Category	Last Updated	Assigned To	Updated
BMP-0666	May-05-2020 07:15:07 PM	Actionable Science	test	InProgress	HR	Others	May-05-2020 07:20:19 PM	actionablescience@bunim-murray.com actionablescience@bunim-murray.com	--
BMP-0557	May-04-2020 06:01:15 PM	Actionable Science	test ticket by ASC	Assigned	IT	Email/O365	May-04-2020 06:01:34 PM	Actionable Science	--
BMP-0551	May-01-2020 ...	Actionable	Test ticket by ...	InProgress	HR	General	May-04-2020 ...	Actionable Science	--

Setting up users in Ticket Mgmt

Add a new agent/support staff to ticketing module

Access level needed

- ✓ Ticket Admin

Pre-requisite

- ✓ User has already access virtual agent once and is available in User Management as a User with role "Ticket agent".

Instructions

1. Elevate user access to be a ticketing agent by adding role **Ticket agent** from **User Management**.
2. Instruct the user to logout and login back and access **Ticket Mgmt - > My Tickets** once so that the user can be listed in the ticketing module when adding to a queue.
3. Go to [Add an agent/support staff to a new or existing ticketing queue](#)

Add an agent/support staff to a new or existing ticketing queue:

Access level needed

- ✓ Ticketing Admin

Pre-requisite

- ✓ Queues are already created. If not, please follow steps to [Create a User queue](#).
- ✓ The user that needs to be added is already a part of ticketing and has accessed ticketing module at least once and has a role assigned "Ticket agent"

Instructions

1. Click on Queue Name that you want to modify.
2. Under **Username**, start typing in the username that you want to add. The user will come as a suggestion. Select the user.
NOTE: *If you don't see the user come under the suggestion, then the user is not available in ticketing or has not accessed ticketing at least once, go to [Add a new agent/support staff to ticketing module](#).*
3. Select **Status** as Published from Dropdown.
4. Click on **Update**.

My Tickets

This is the screen where all tickets land up whether created from Use cases designed in Virtual Agents or created by Support Teams. This has 4 tabs that help a support agent to see tickets. Below is a quick know-how of those 4 tabs:

My Queues – Assigned: This has the tickets that are assigned to the logged-in support user for the queue (s) they are a member of. The logged-in user can be a part of a single support queue or multiple support Queues and will see all tickets assigned to them.

My Queues – Unassigned: This has the tickets that are not assigned to any member of the queues for which the logged-in support user is a member of. The logged-in user can be a part of a single support queue or multiple support Queues and will see all tickets not assigned to any member of those queue(s).

Submitted by me: This is available to end-users as the Self Service portal and includes the ticket that is created by them. These also include tickets created by Support teams for themselves or an end-user (applicable for support user only)

My Queues – All: This has all tickets in all states assigned to the queues that the logged-in support user is a member of. This includes all tickets that are in **My Queues – Assigned** and **My Queues – Unassigned** including all closed tickets.

Creating a new ticket

1. Navigate to **Ticket Mgmt** and click on + **Create ticket**
2. **Enter the details** like Subject, Domain, Category, Description.
3. Select the **Requested For** (if different from Submitted By)
4. Click on **Submit**
5. You will get a message on Top right saying Ticket Submitted.
6. Navigate to the **“Submitted by Me”** tab and the ticket will be available as the very first option.
7. Open the same ticket again and update the **Assigned To** with the member name you want to assign the ticket to. The Assigned To field is prepopulated based on Key like Domain and comes up only after submitting the ticket. Once done, Click on **Update**.

8. Ticket status can be changed by selecting the next status available on the top right. The status button will auto change the status based on your current status of the ticket.
 - ✓ **Ticket Status workflow:**
Submitted - >Assigned ->InProg ->Resolved - > Close / Reopen
 - ✓ You can add/modify fields in an open ticket and click on **Update Ticket** from the top right at any point /any stage to have the new changes saved in the ticket.

NOTE: The above may vary depending on the customization of your ticketing model

Updating an existing open ticket

Updating an existing open ticket can involve:

- ✓ Changing the **Subject** of the ticket
- ✓ Changing the **Description** of the ticket
- ✓ Changing ticket properties such as Domain, Category, Subcategory.
- ✓ Changing the **“Assigned To”** field.
- ✓ Changing of the **“Requested For”**.
- ✓ Updating **Status** of the ticket using **workflow** buttons.
- ✓ Notes

To update a ticket, please follow these steps:

1. Open the ticket that you want to update from the ticketing list. Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**
2. Update the desired field and click on **Update** from top right
3. Once updated, you will be redirected to the Ticket List screen and the ticket you just updated will be available on the very top based on the filter -Last created/updated on the top
4. If you wish to update the status of the ticket, click on the status workflow button available on the top right just next to the Update button.
5. If you did some changes and would like to discard them before saving, please click on **Cancel** from the top right just next to the workflow button.

NOTE: The above may vary depending on the customization of your ticketing model

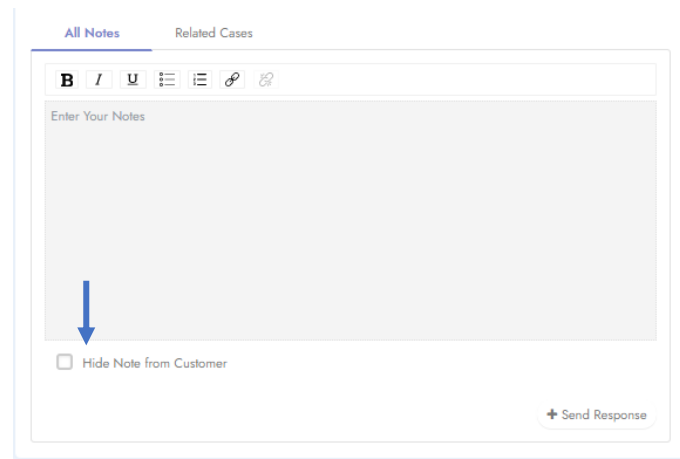
Adding a Note

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**.

2. Scroll down to the Note section
3. Add your Note

Note: If you do not want the user to see the note when they look at the ticket, make sure to check the box in front of *Hide Note from Customer*. The **+Send Response** button will become **+Save**.



4. Click on **+ Send Response** or **+ Save**

Note: **+ Send Response** will send the Ticket Requester an email saying the ticket has been updated with a link to access it. **+ Save** will not send an email.

5. Click **Update** when you are done making any changes

Adding an Attachment

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**.

2. Scroll down to the *Attachment* section (Right under Description)
3. Click **Browse**



4. Select the file to be added

Note: We suggest a note be added stating that file was attached

5. Click **Update**

Assign a Ticket to someone

1. Open the ticket that you want to assign from the ticketing list by clicking on the ticket number.

Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**.

2. Look for *Assign To*
3. Next to it is a dropdown box, click on the dropdown box

The screenshot shows a ticket management interface. On the left, there are input fields for 'test', '*****START', and '***//'. Below these is a text area with the text 'd you like to do?Register attendance' and a 'report' button. On the right, there is a 'Status' dropdown set to 'Submitted', a 'Submitted By' field with 'Srikant Poruri', and a 'Requested For' dropdown set to 'Select...'. Below these is an 'Assigned To' dropdown set to 'Assignee'. A blue arrow points to the 'Assigned To' dropdown. The dropdown menu is open, showing a list of email addresses: 'rcabrera@buildings.nyc.gov', 'sporuri@buildings.nyc.gov', 'grabinowitsch@buildings.nyc.g', and 'kcameron@buildings.nyc.gov'. Below the list is a search bar. At the bottom of the interface, there is a footer that says 'Powered by Actionable Science'.

4. You can either search by typing the name or scrolling through the list, click on the name once you find the one you want
5. Click Update Status

Resolve a Ticket

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**.

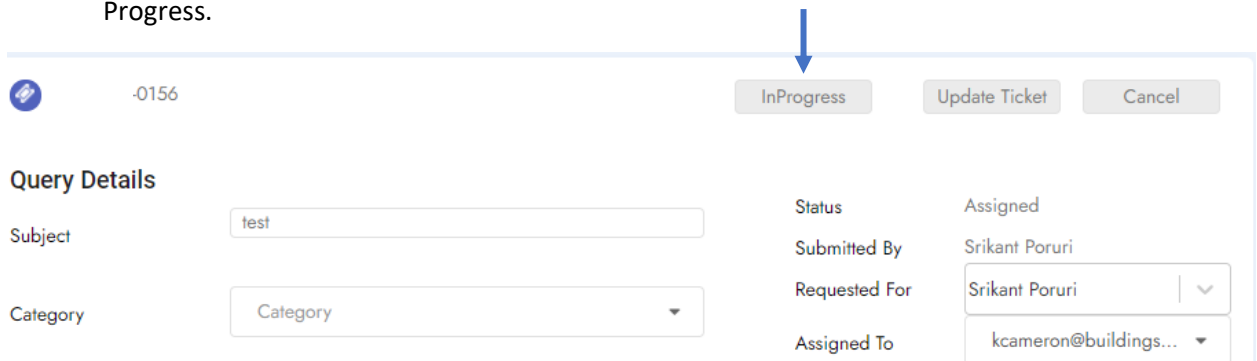
2. If the ticket status is *Submitted* continue to step 3, if your ticket is in *Assigned* status skip to step 6 or if the ticket is already *In Progress* status continue to step 7
3. Assign the ticket to yourself by selecting your name from the Assign To dropdown box

This screenshot is identical to the one above, showing the 'Assign To' dropdown menu with a blue arrow pointing to it. The dropdown menu is open, showing a list of email addresses: 'rcabrera@buildings.nyc.gov', 'sporuri@buildings.nyc.gov', 'grabinowitsch@buildings.nyc.g', and 'kcameron@buildings.nyc.gov'. Below the list is a search bar. At the bottom of the interface, there is a footer that says 'Powered by Actionable Science'.

4. Click Update Status
5. The ticket will automatically close, go to *My Queue – Assigned* to locate the ticket and open it again

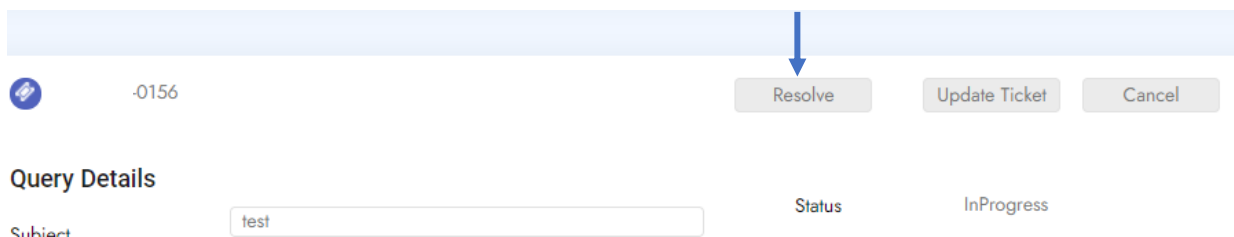
6. Click **In Progress** button.

Note: To get the Resolve button, we must first change the ticket status from Submitted to In Progress.



The screenshot shows a ticket details form for ticket number 0156. At the top right, there are three buttons: 'InProgress', 'Update Ticket', and 'Cancel'. A blue arrow points to the 'InProgress' button. Below the buttons, the form is divided into two sections. The left section, titled 'Query Details', contains fields for 'Subject' (with the value 'test') and 'Category' (with a dropdown menu). The right section contains fields for 'Status' (with the value 'Assigned'), 'Submitted By' (with the value 'Srikant Poruri'), 'Requested For' (with a dropdown menu showing 'Srikant Poruri'), and 'Assigned To' (with a dropdown menu showing 'kcameron@buildings...').

7. Add any notes you may need to
8. Click on the **Resolve** button



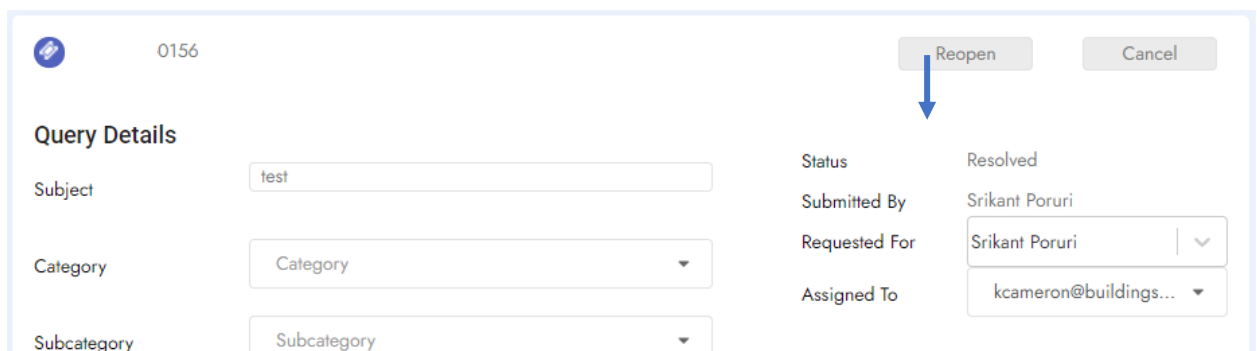
The screenshot shows the same ticket details form for ticket number 0156. The 'Status' field now shows 'InProgress'. The 'Resolve' button is highlighted with a blue arrow. The 'Update Ticket' and 'Cancel' buttons are still present.

Reopen a Ticket

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt -> My Tickets**.

2. Click **Reopen**



The screenshot shows the same ticket details form for ticket number 0156. The 'Status' field now shows 'Resolved'. The 'Reopen' button is highlighted with a blue arrow. The 'Update Ticket' and 'Cancel' buttons are still present.

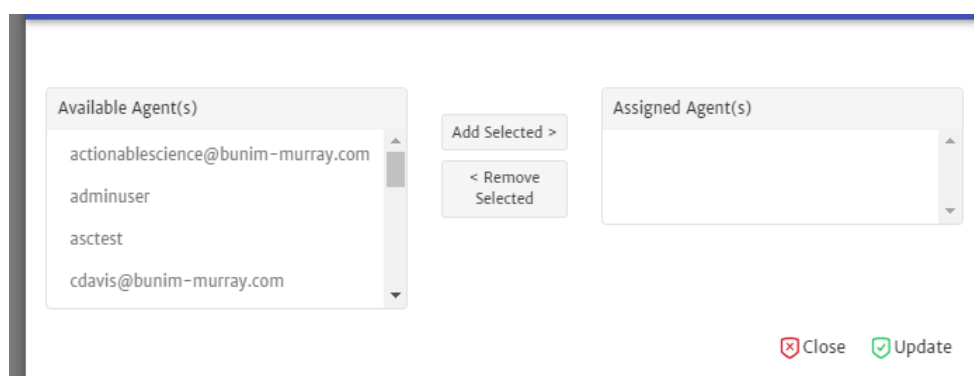
Live Chat

This module is used to connect end-users to live agents/support staff from the BOT. In this way the BOT conversations can be configured to connect end-users to a live chat team as and when required. This configuration is purely customizable depending on your needs. For more info on the customization, you can contact your SPOC at Actionable Science.

Add/remove users from queues

For the user to act on Chats, we need to elevate their role and add “Chat Agent” from User Management first.

1. Navigate to **Live chat** - > **Live chat settings** - > **Associate Agent(s)** .
2. Select the queue you want to add/remove members to by clicking on Edit(Pencil) sign under actions.
3. Once you click on Edit, a new screen will open :



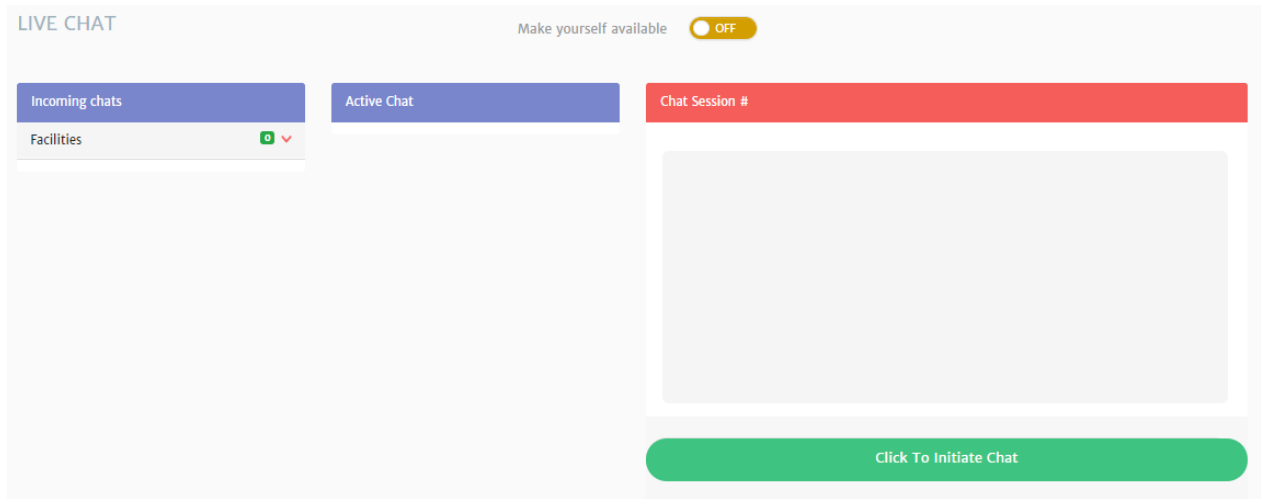
On the left-hand side, you will see all users who have a chat agent role and can be added in the queue.

- Select the agent name on the left pane
- Click on **Add Selected**
- Click on **Update** and you will be back on the **Associate Agent(s)** screen with the new user added for the queue and available under **Users**.


You can remove the user by doing the vice versa of the above.

My Chats

This is the main screen where all chats land up from end-users. Below is how the chat terminal looks like



Screen Components

Incoming Chats: These are the unanswered chats waiting in the queue. You will see the queue name such as “Facilities” and no. of chats waiting in the green square . When a support user will click on the red dropdown that is on the right edge, a dropdown will open showing the details (name/email id) of the user who is waiting. The support agent can select the chat and click on the Green bar **Click to Initiate Chat**

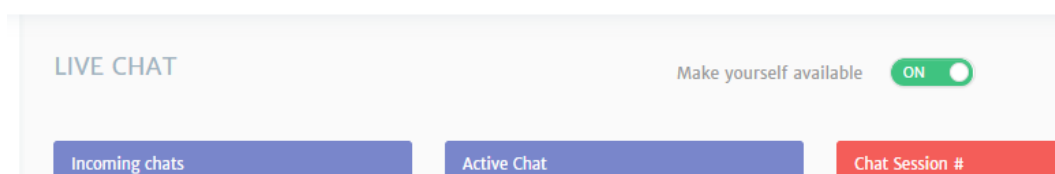
Active Chat: This shows the list of end-users that are currently being serviced. In other words, these are chats that are in work in progress. Under active chats, an agent can see details (name/email id) of the user who they are servicing. In case there are multiple queues that a support user is servicing, then they will see the queue name followed by users being serviced in each queue.

Chat Session: This window shows the current chat at which a support user is working on at any point in time. This will show the chat transcript between user and agent/ BOT.

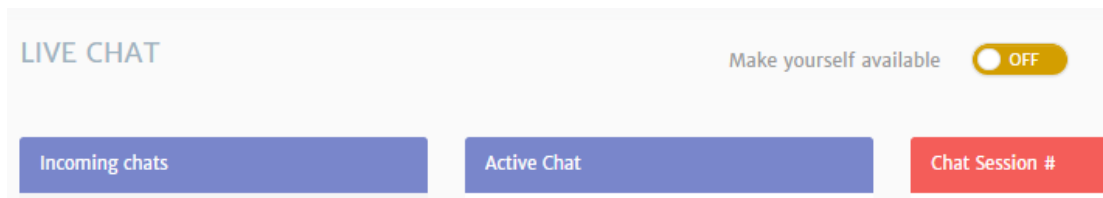
How does Live Chat works

- When a chat comes in **Incoming Chat** panel, an agent will get a pop up on the top right and a pop-up sound that notify them of an incoming chat.
- Agents need to enable their availability from **Live Chat** -> **My Chats** screen and turn availability **ON** as shown below:

Availability is **ON**:



Availability is **OFF**

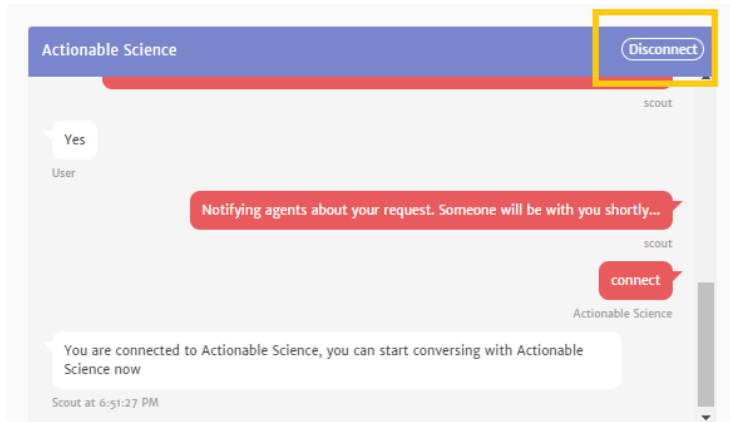


NOTE: The support agent can only pick up the chats if their availability is **ON**. If their availability is **OFF** and they try to pick up an incoming chat, they will get an error that will ask them to update their availability and then try to pick up the chat.

- Once they are **ON** and select a Chat in Incoming Chats, the chat transcript is automatically populated under the **Chat Session**.
- To pick up the chat and start conversing with the user, the Support agent will need to click on **Click to Initiate Chat** and the system will connect User and the live agent.
- Once the chat is complete, support agents can click on the **Disconnect** button available on the top right of the Chat session. This way the user will be disconnected, and the chat session will close automatically at the agent terminal.
- On the BOT, the user will be provided with feedback or further assistance based on the customization and requirements.

Disconnecting User chats

Agents can disconnect the chats from their support portal (My Chats) module. Once they are servicing the chat and want to end it, they can simply click on the Disconnect button while on the chat. This will close and remove the user session from their end.



Once done, BOT will continue with the user as per the configured workflow.

NOTE: The system doesn't allow Chat agents to log off from the system without Turning their availability **OFF**. In case, the agent tried to logoff without turning their availability **OFF**, the system gives them an error notification and asks agents to first turn off the availability and then logoff/ logout.