

JAMES INTEGRATION



USER GUIDE

Contents

- ServicePRO – James Chat Bot Integration User Guide..... 2
 - 1. Configuring the James Widget in ServicePRO..... 2
 - 2. Enabling James Widget in a Web Page 3
 - 3. Training James through the Admin Console 3
 - 3.1. Manage Q&A – Add knowledge base articles..... 4
 - 3.2. Manage SmallTalk 6
 - 3.3. Manage Task 7
 - 3.4. Training Failed utterances..... 8
 - 3.5. Review Chat 9
 - 3.6. Reports 9
 - 3.7. Categorize the knowledge base 10
 - 3.8. Look and feel changes..... 12
 - 3.9. Add/Edit Users 12
 - 4. Interacting with James (ServicePRO Web)..... 13
 - 4.1. New Issue 15
 - 4.2. Review Recent Open Requests 16
 - 4.3. Update a Request..... 18
 - 5. APPENDIX A..... 19
 - 5.1. HTML Code to be inserted in your Web Page..... 19
 - 5.2. Folders to be copied from ServicePRO Web application to your website..... 22
 - 5.3. Changes in ServicePRO Web’s Config File..... 22

ServicePRO – James Chat Bot Integration User Guide

Help Desk Technology has partnered with Actionable Science to incorporate their AI powered conversational virtual assistant called **James** in ServicePRO.

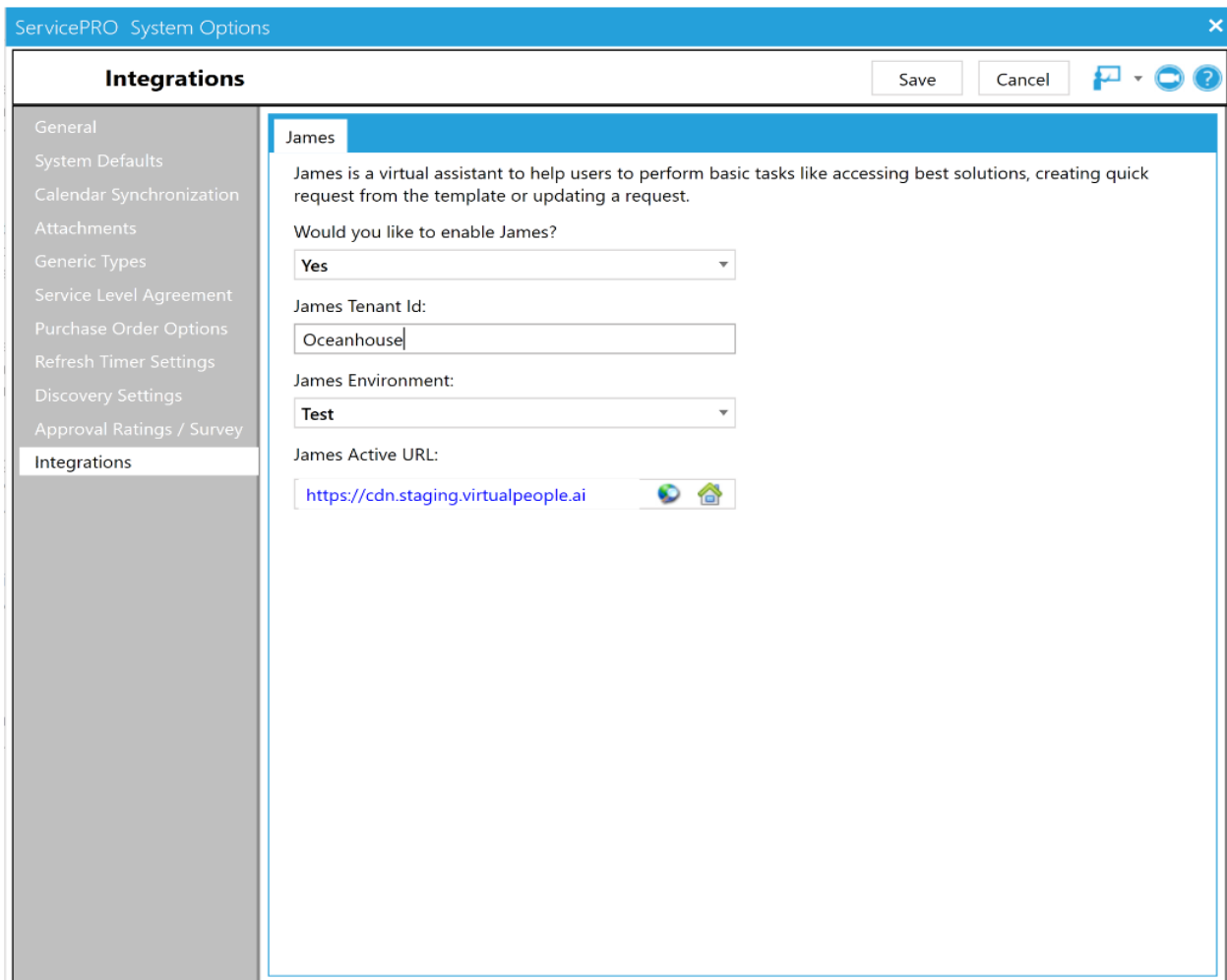
James is a specialized IT Help desk virtual assistant that can provide instant support to your customers round the clock, increase usage of self-help tools and enhance SLA performances.

This user guide will provide details on how to install James in your ServicePRO Web portal or any web page, how to train the virtual assistant so it is customized for your service desk and a demonstration of how the AI virtual assistant works.

Please note that there is an additional cost associated with this feature. You can contact ServicePRO customer service for pricing.

1. Configuring the James Widget in ServicePRO

Please contact ServicePRO support to enable the James widget in your ServicePRO instance. Once enabled, ServicePRO's System Option page will update with an additional tab called 'Integrations'.



The screenshot shows the 'ServicePRO System Options' window with the 'Integrations' tab selected. The 'James' sub-tab is active, displaying the following configuration options:

- James** (tab title)
- Description: James is a virtual assistant to help users to perform basic tasks like accessing best solutions, creating quick request from the template or updating a request.
- Would you like to enable James? (Dropdown menu): **Yes**
- James Tenant Id:
- James Environment: (Dropdown menu): **Test**
- James Active URL: (with globe and house icons)

NOTE: Changing System options require recycling ServicePRO

You will find the following options here:

1. Would you like to enable James?
Select 'Yes' from the dropdown
2. James Tenant ID:
You will be provided with a James Tenant ID which can be entered here
3. James Environment:
Select 'Test' if you are using JAMES in the test environment.
Select 'Production' if you are using JAMES in the Production environment.
By default the value 'Test' will be displayed.
4. James Active URL:
URL will be populated automatically based on the 'James Environment' selected. It's possible to edit the URL. It's advisable not to edit and change this URL unless it's advised by the HDT Support or the Actionable Sciences' Support.
Clicking on reset icon will reset the URL back to the auto-populated URL

2. Enabling James Widget in a Web Page

After the James Integration has been enabled in ServicePRO, the James widget can be placed on any web page that your customer visits for support.

Please follow the instructions in Appendix A for the following:

- 1) HTML code that needs to be added to the web page for adding the James widget
- 2) James image, css and fonts Folders/Files that need to be copied from ServicePRO Web application folder to your website
- 3) Changes that need to be made in the Web.Config file of ServicePRO Web application

3. Training James through the Admin Console

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

From this console you can do the following:

- Manage Q&A – Add knowledge base articles
- Manage SmallTalk – Add common phrases and relevant responses
- Manage Task – Add known questions or phrases for which appropriate ServicePRO request templates should be initiated
- Training Failed utterances - Train failed utterances
- Review Chat – View conversations between the users and James Bot
- Reports – Reports providing insights on James' performance
- Categorize the knowledge base - segregate questions based on hierarchy, category and simple tags
- Look and feel changes – Change icon, colors, name, branding and landing prompt of the bot
- Add/Edit Users – Add/edit users that can access the admin console

3.1. Manage Q&A – Add knowledge base articles

This module allows to add/edit/delete the articles. The articles support images, hyperlinks and gifs and can be further formatted using the text editor. These articles further become part of the knowledge base of James.

The screenshot displays the Virtual Agent Mgmt dashboard. On the left is a navigation menu with the following items: Virtual Agent Mgmt (with a dropdown arrow), Dashboard, Reports, Notifications, Knowledge Mgmt (with a dropdown arrow), and Supervised Learning (with a dropdown arrow). Under Knowledge Mgmt, there are three sub-items: Manage Q&A, Manage SmallTalk, and Manage Task. A blue arrow points from 'Manage Q&A' to the 'MANAGE Q&A' section below. The main dashboard area features two KPI cards: a teal card for 'Interactions' with the value '1370' and an orange card for 'Question Answered' with the value '7'. Below these is a 'User Interaction' section with a value of '600'. The 'MANAGE Q&A' section includes a blue button with a plus sign and the text 'ADD A NEW Q&A'. To the right of this button are two filters: 'All' (with a dropdown arrow) and 'La'. Below the filters are two buttons: 'Sync External KB' (with a refresh icon) and a download icon.

MANAGE Q&A Search

Add New Q&A

Metadata Management

B *I* `{ }` Normal ▾ ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷ 🔗 🗑️ 🗑️ ↶ ↷

✖ Close ✔ Save

Insert variant of questions

Insert question here

This is a test question?

Test Question?

Metadata Management

Task

Select A Task

Hierarchical Tags Simple Tags

Select Dimension Select Metadata Select Value +

B *I* {} Normal [List] [List] [Link] [Link] [Image] [Refresh] [Refresh]

Test Answer

Provide Answer here

3.2. Manage SmallTalk

This allows to add common phrases used while doing conversation with Virtual Agent.

Dashboard

Reports

Notifications

Knowledge Mgmt

 Manage Q&A

 Manage SmallTalk

 Manage Task

Supervised Learning

Taxonomy

Small Talk

+ ADD A NEW SMALL TALK

Published Published

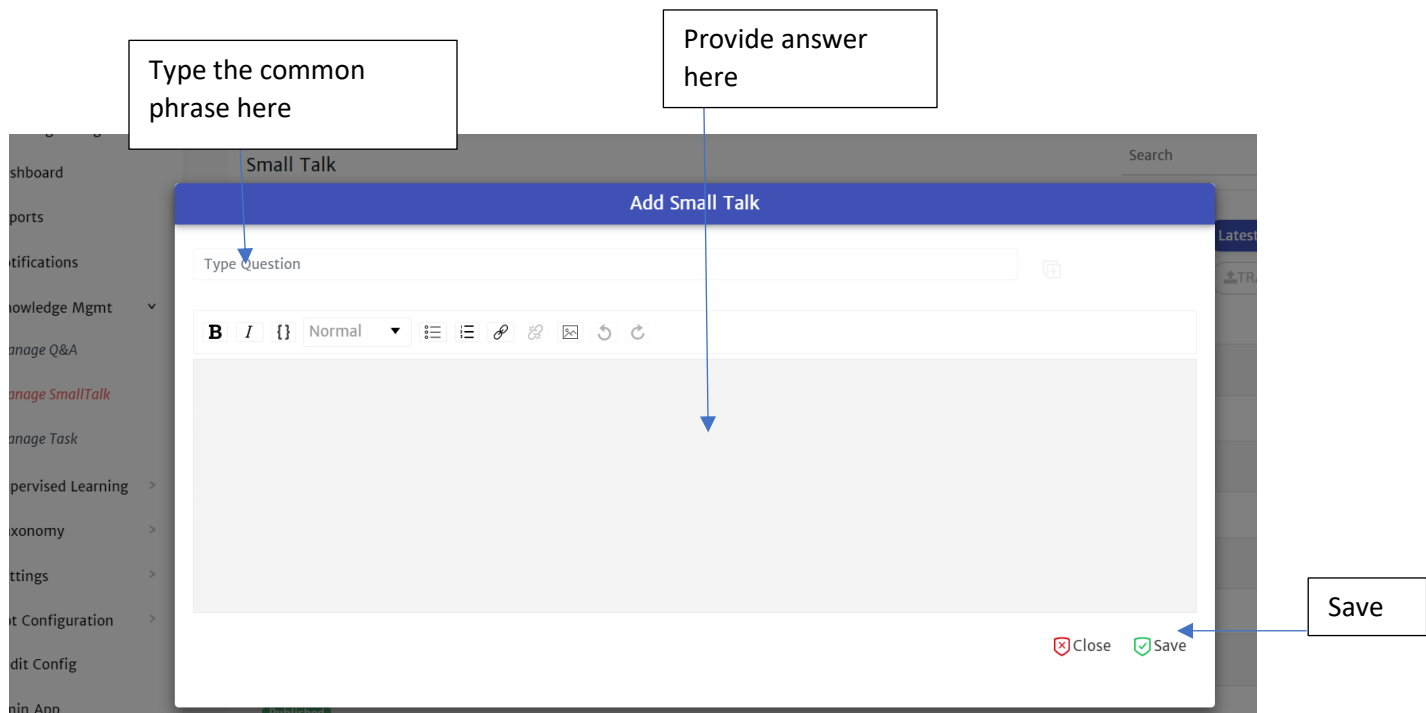
Ask me anything? test 1?

Published Published

Duplicate test 1? Duplicate Question

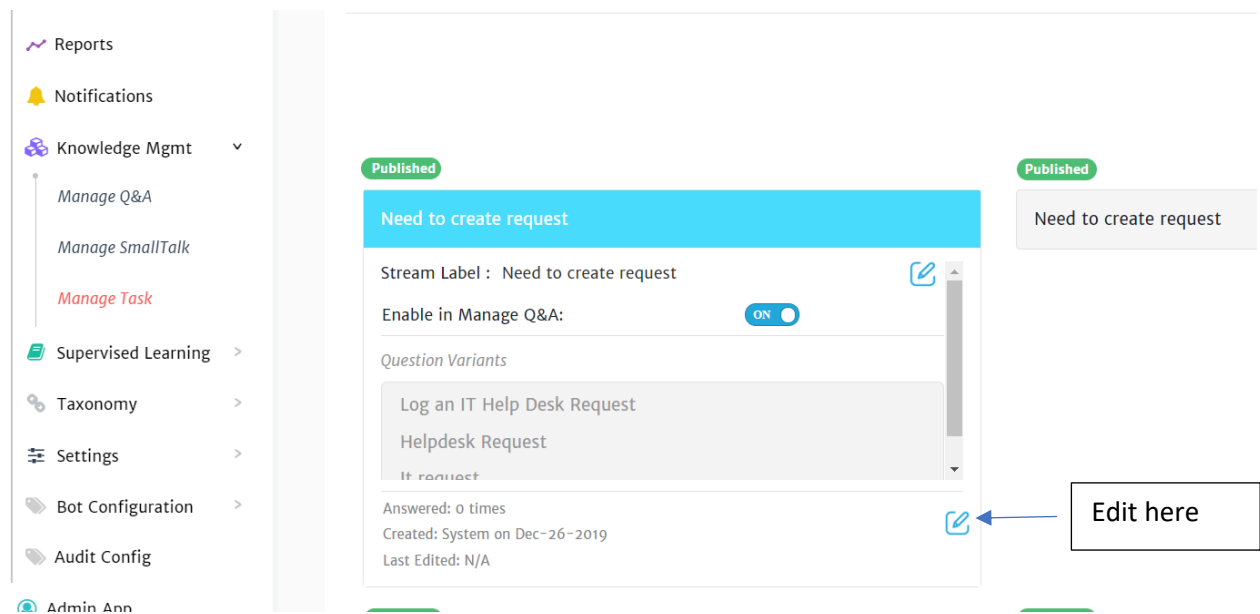
Published Published

hi? hi?



3.3. Manage Task

Allows to add/edit/delete the utterances which can trigger any Request template flow.



Add variant here

Edit Task All

Log an IT Help Desk Request ⊗

Helpdesk Request ⊗

It request ⊕ ⊗

Meta Tags

log an it help desk request ⊗ Close Update

Template name

Update here

Answered: 0 times

3.4. Training Failed utterances

Failed utterances are those inputs for which James was not able to help the user. This Module allows to train these utterances as part of James.

View conversation here

Question posted by user

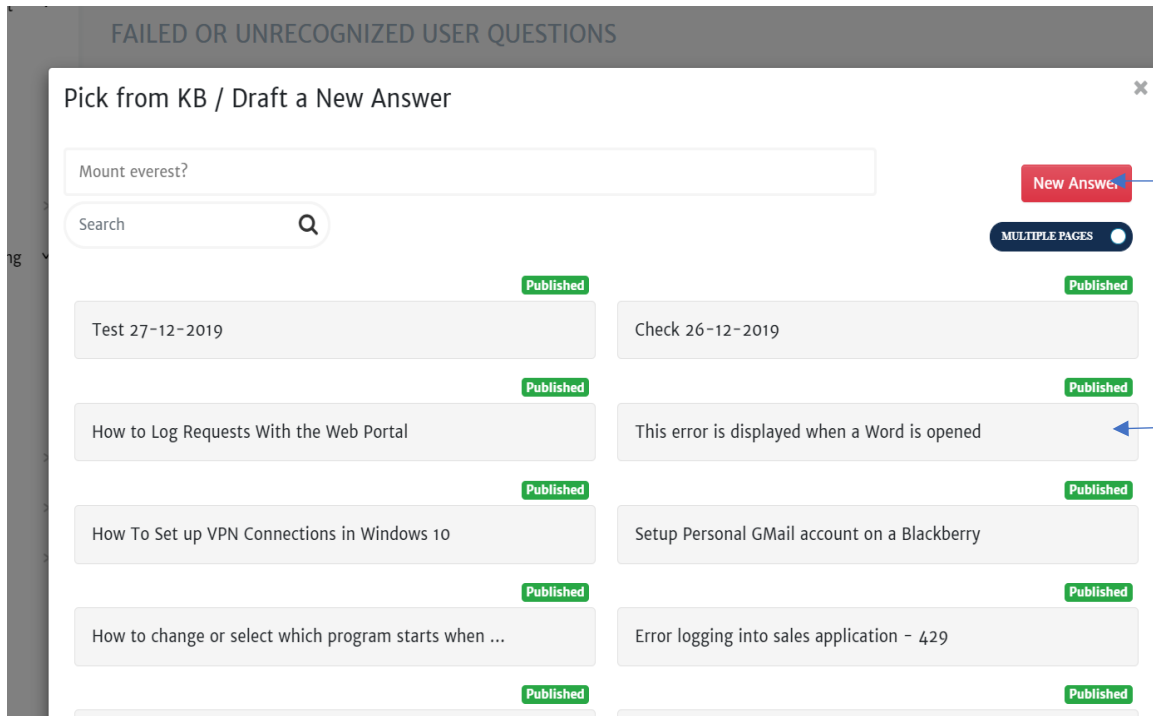
Tag any utterance to a Task

Tag any utterance to an existing question

Tag any utterance to an existing small talk

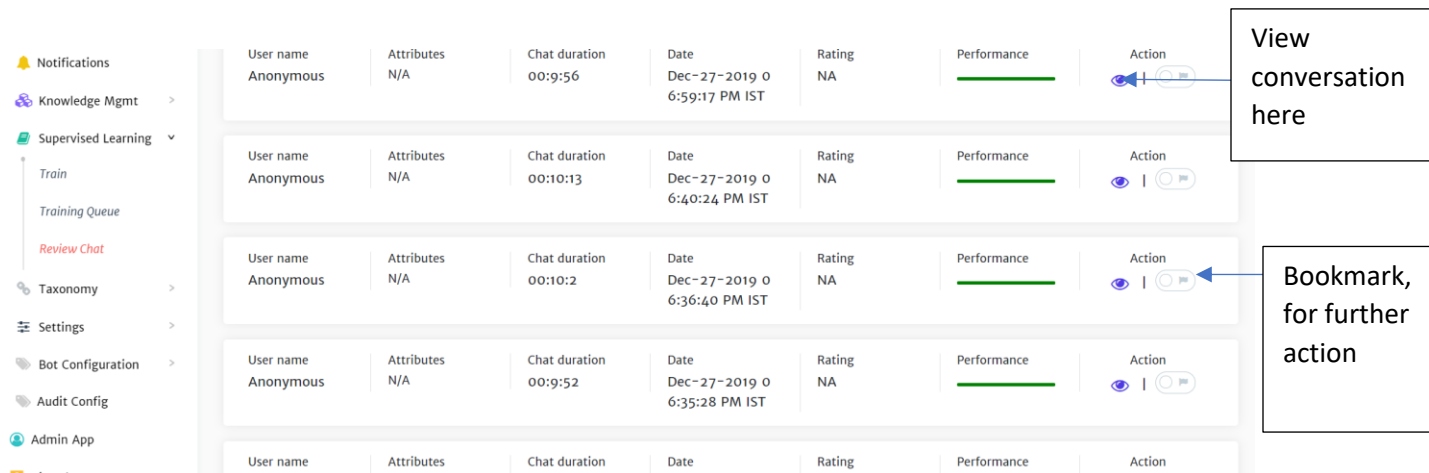
Date when the utterance failed.

Select	User	Attributes	Failed Date/Time	User Question	Task	Q&A	Smalltalk	
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 01:35:15 PM IST	Mount everest	Task	Q&A	Smalltalk	⊗
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 12:37:23 PM IST	hhgkjkhjh	Task	Q&A	Smalltalk	⊗
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 12:36:22 PM IST	ghgihghj	Task	Q&A	Smalltalk	⊗
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 12:04:07 PM IST	jmhjhg	Task	Q&A	Smalltalk	⊗
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 11:42:57 AM IST	jkfdjfdjd	Task	Q&A	Smalltalk	⊗
<input type="checkbox"/>	Anonymous	N/A	Dec-27-2019 11:11:33 AM IST	klijki	Task	Q&A	Smalltalk	⊗



3.5. Review Chat

Allows to view the conversation between user and Bot.



3.6. Reports

This module provides insight about the James bot. The following four reports are available:

- A. Unrecognised Utterance - All utterances for which bot was not able to help user
- B. User Feedback - Feedback provided by user about the experience with the Bot
- C. Chat Session - All the instances created for James
- D. Usage Analytics - Insight about every question, whether it was helpful or not

Reports 20 Jun 19 Select

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

3.7. Categorize the knowledge base

Enables to segregate questions based on hierarchy, category and simple tags.

Reports

Notifications

Knowledge Mgmt >

Supervised Learning >

Taxonomy ▾

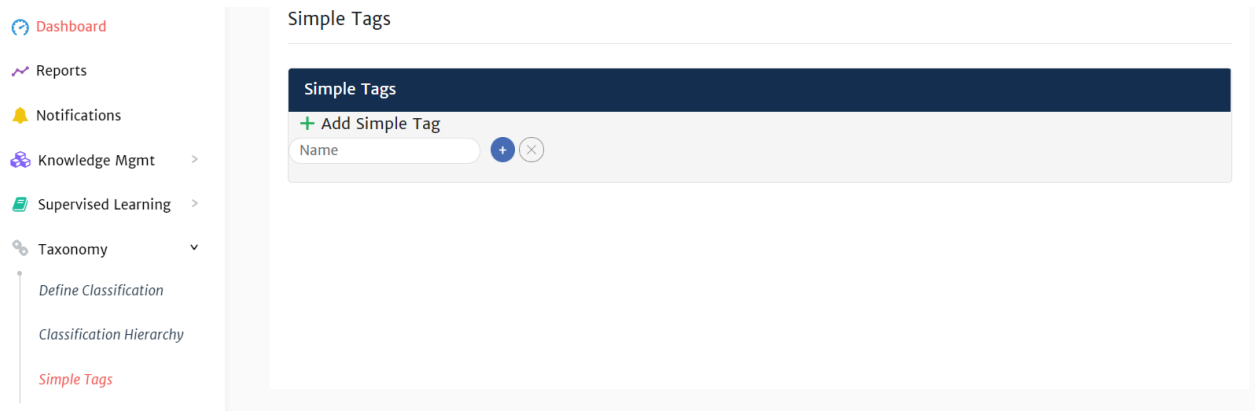
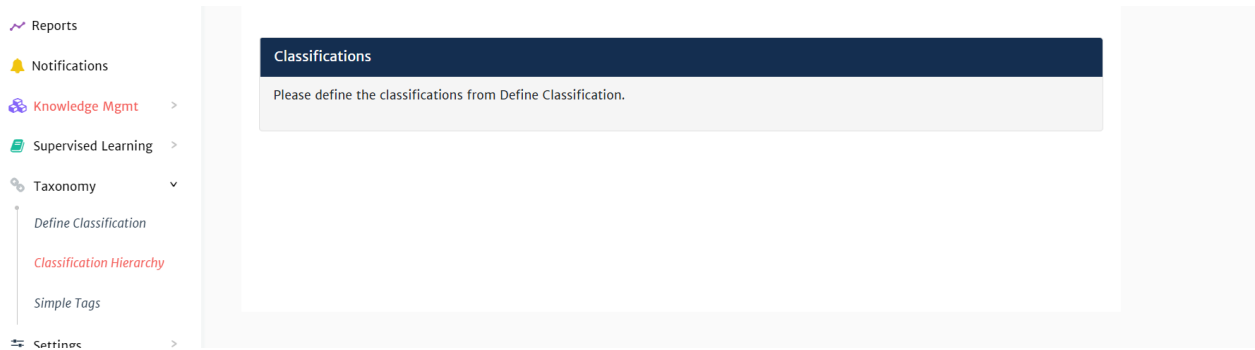
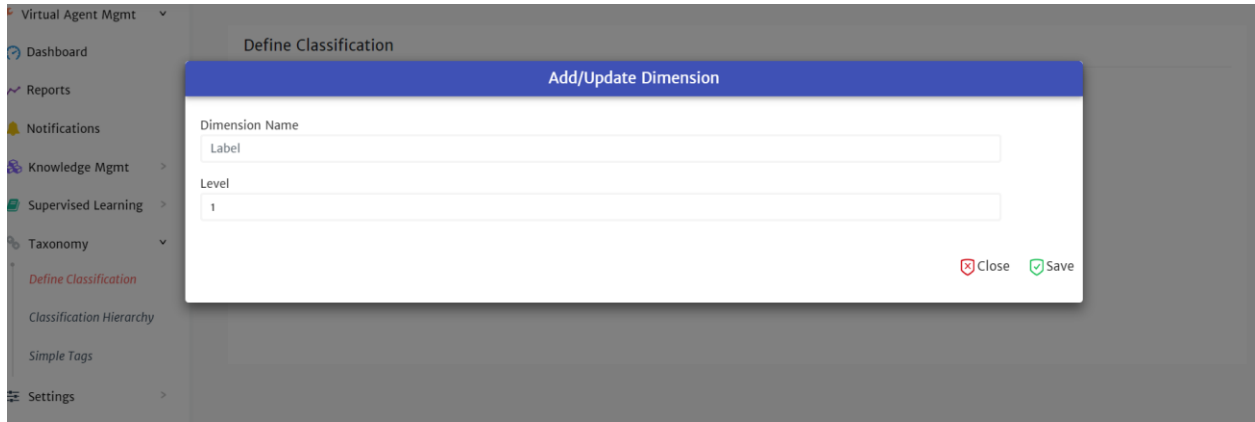
- Define Classification
- Classification Hierarchy
- Simple Tags

Settings >

Bot Configuration >

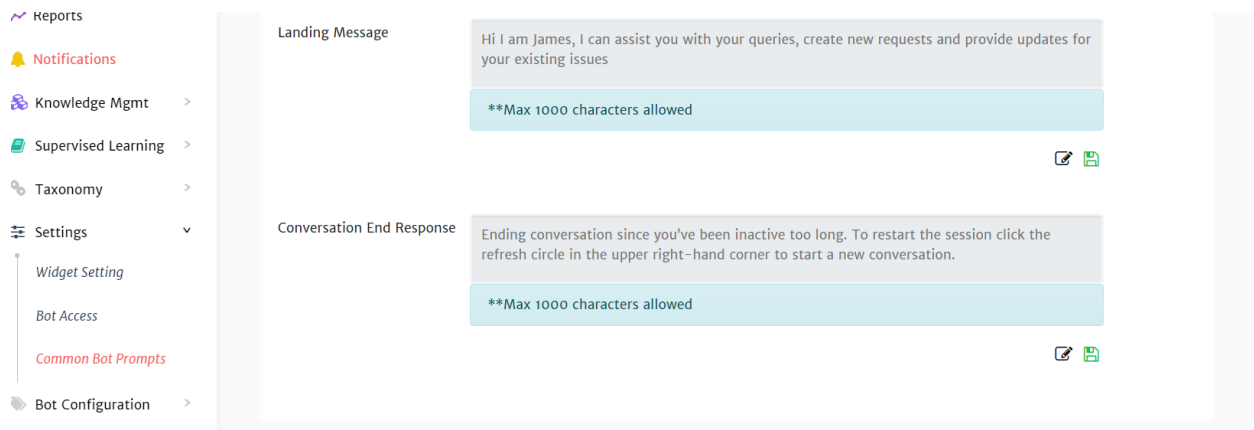
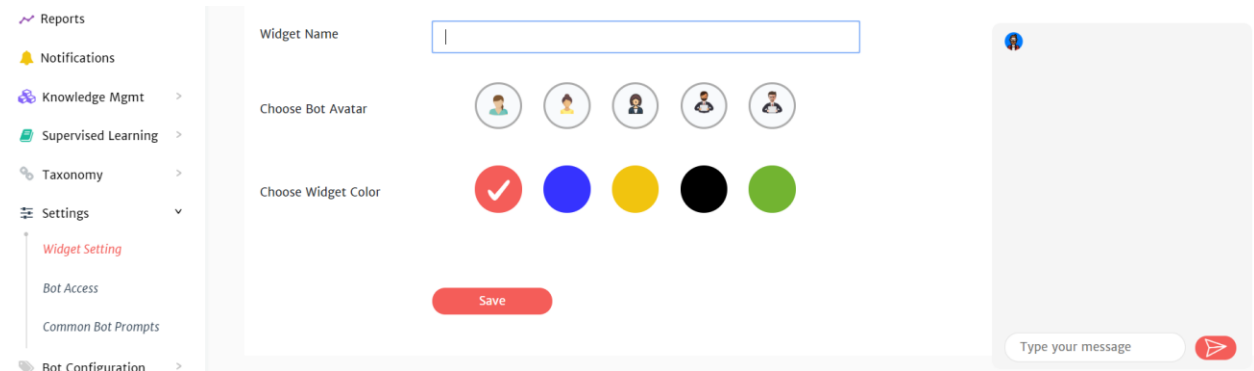
Audit Config

+ ADD A NEW DIMENSION



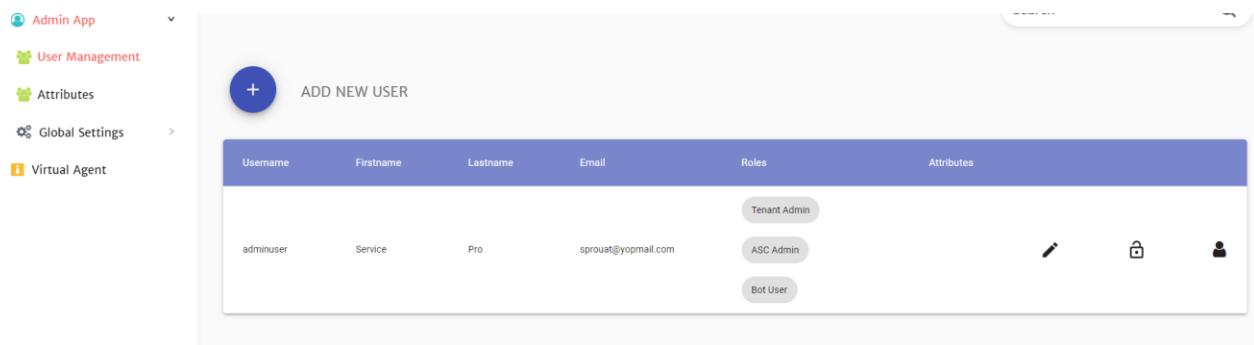
3.8. Look and feel changes

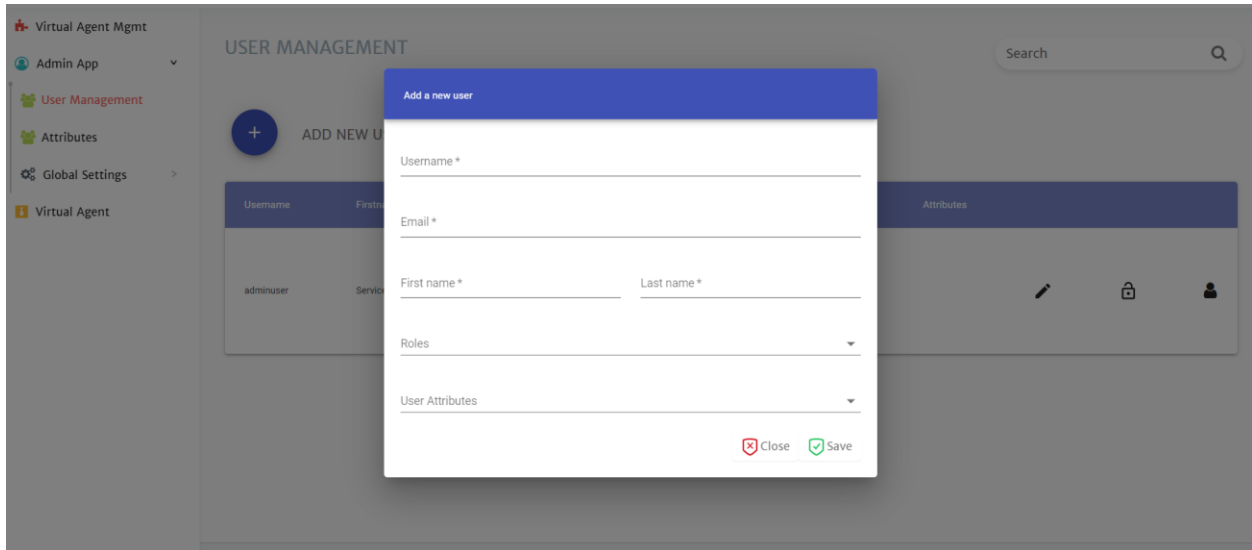
Enables to change the icon, color, name, landing prompt of Bot.



3.9. Add/Edit Users

Allows to add/edit multiple users who can access admin console and assign appropriate roles.

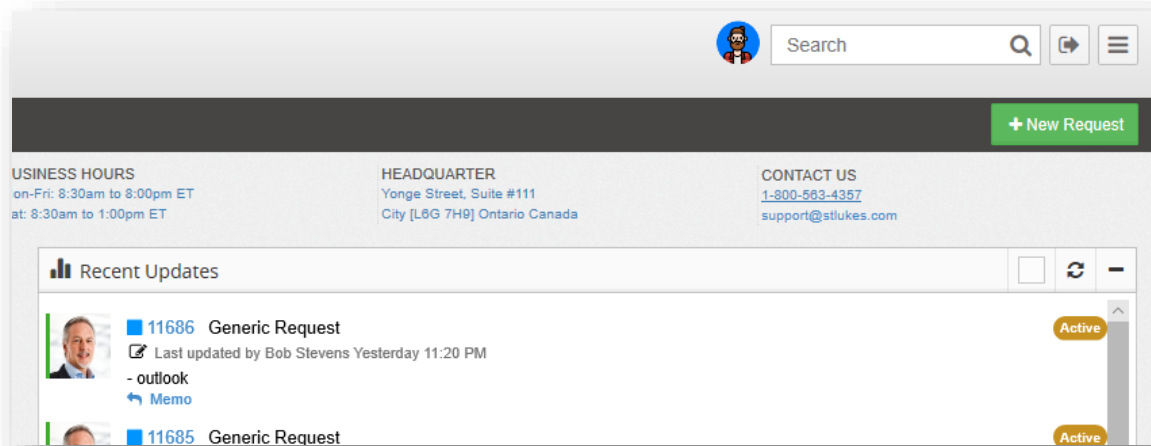




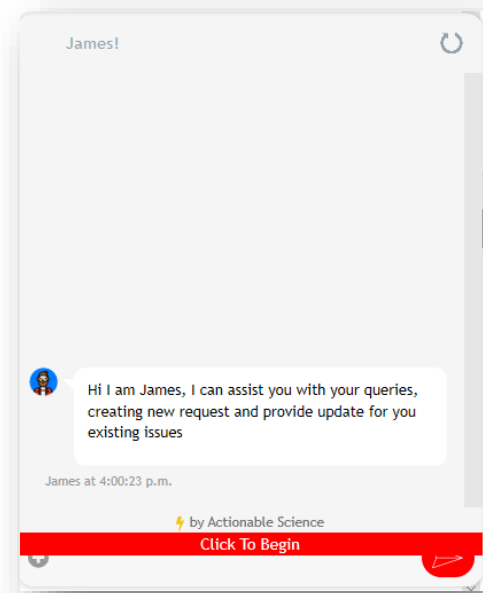
4. Interacting with James (ServicePRO Web)

When a user (end user or privileged user) logs into the ServicePRO Web portal they will see an icon for the virtual assistant, James, in the header bar next to the Global Search box as shown below.

Please note that if the James widget is enabled on a web page, the icon will appear in the bottom right corner, but the user experience will remain the same.

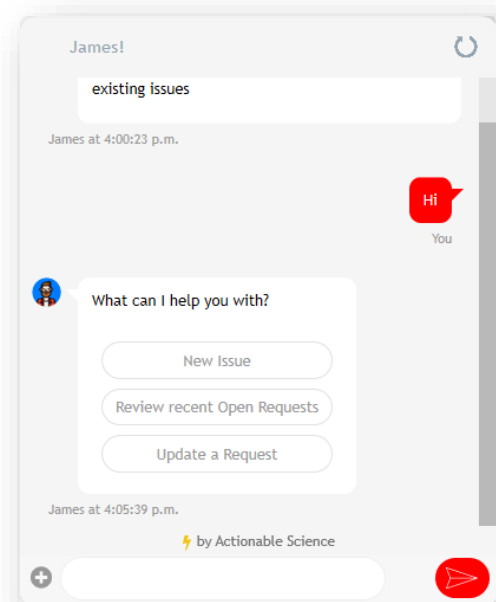


When the user clicks on the icon, a chat window will appear in the bottom right corner with a welcome message.



Once initiated, James will give the following three options to the user:

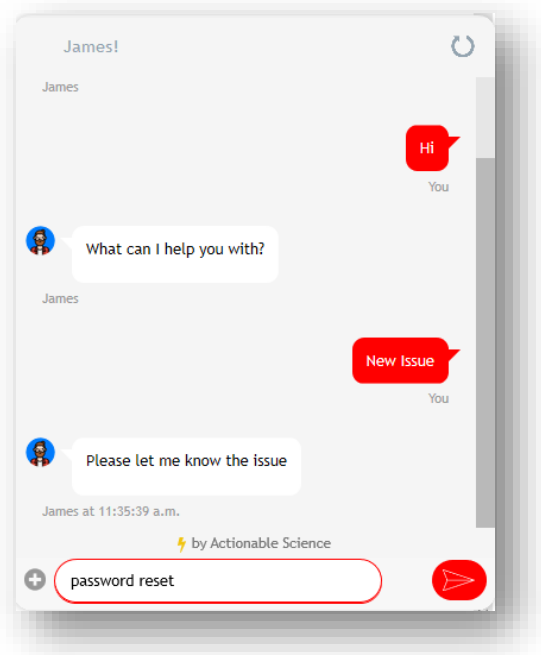
- *New Issue*
- *Review recent Open Requests*
- *Update a Request*



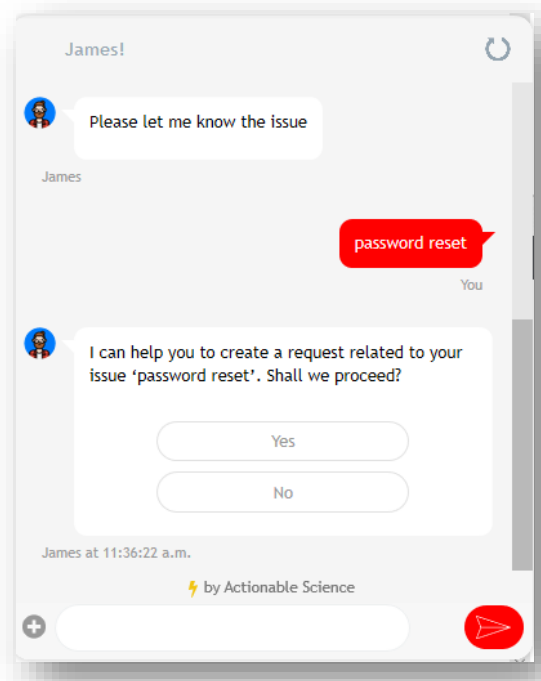
The user's interaction with the virtual assistant upon selection of each of these options is described next.

4.1. New Issue

If the user selects 'New Issue', they will be prompted to enter a brief description of the issue in the chat input box.

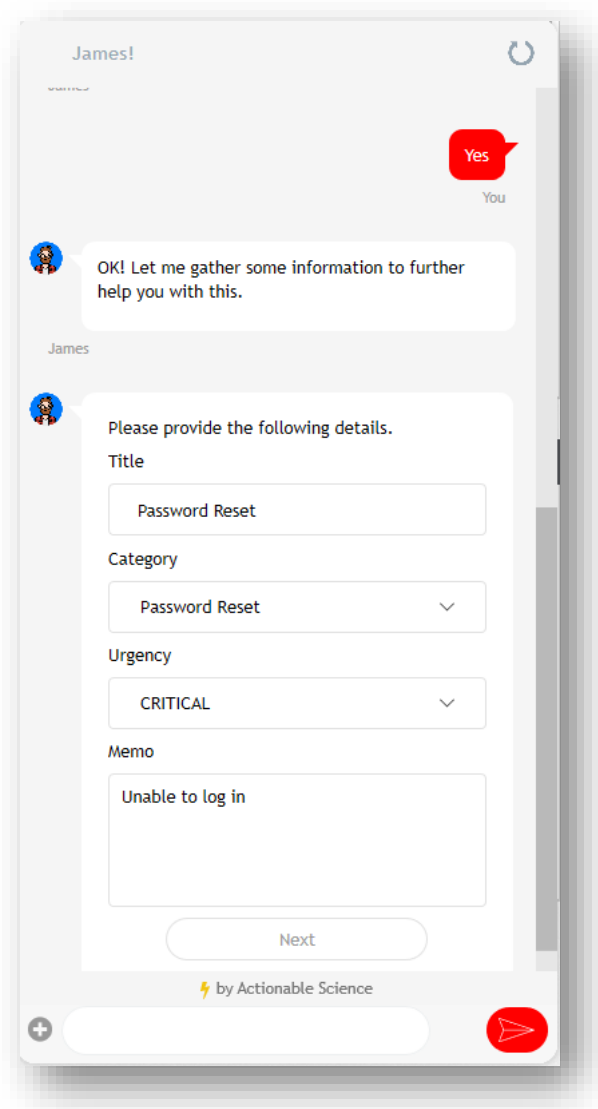


In this case, the user entered 'Password Reset' as the issue. The virtual assistant will then check to see if a matching knowledge base article can be found. If not, then it will guide the user through a new request submission process.



Upon selecting 'Yes', the user is prompted to enter the relevant information needed to submit the new request. At this point, the user will also be prompted to enter any REQUIRED custom fields that are

associated with the template. The requirement on custom fields can be set from the Form Designer in ServicePRO.

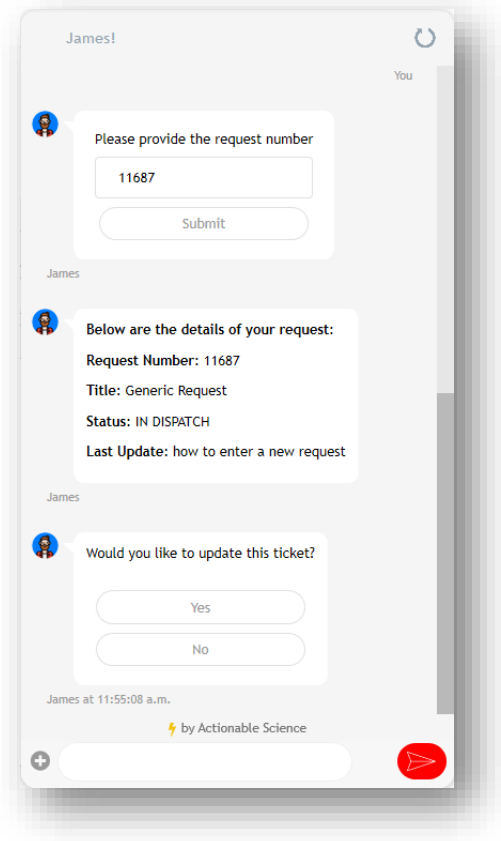


Knowledge Base:

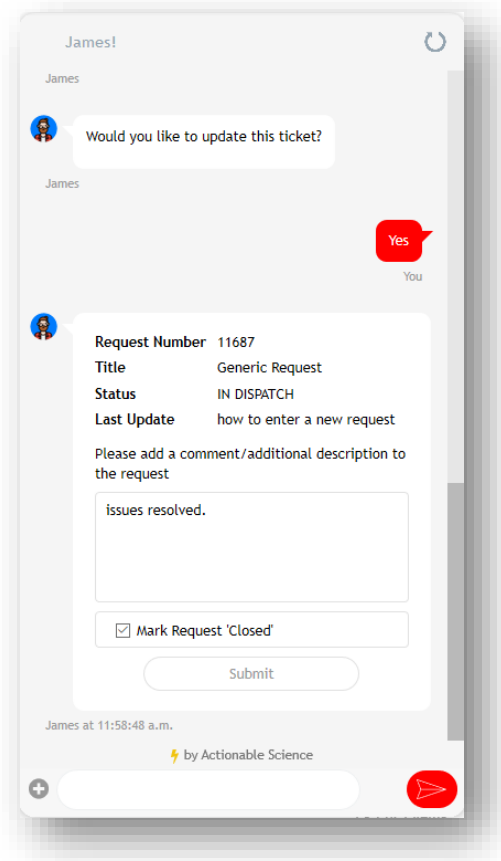
In the event that one or more appropriate knowledge base articles were found, the virtual assistant will suggest the articles in response to the issue and the user can select and view any of the articles.

4.2. Review Recent Open Requests

Upon initiation, if the user selects 'Review Recent Open Requests', they are shown a list with their 5 most recent open requests to choose from. If no recent requests are found, they are prompted to enter a request number. Following that they are shown request properties such as Reference Number, Title, Status and Last Update and are given an option to update the request.

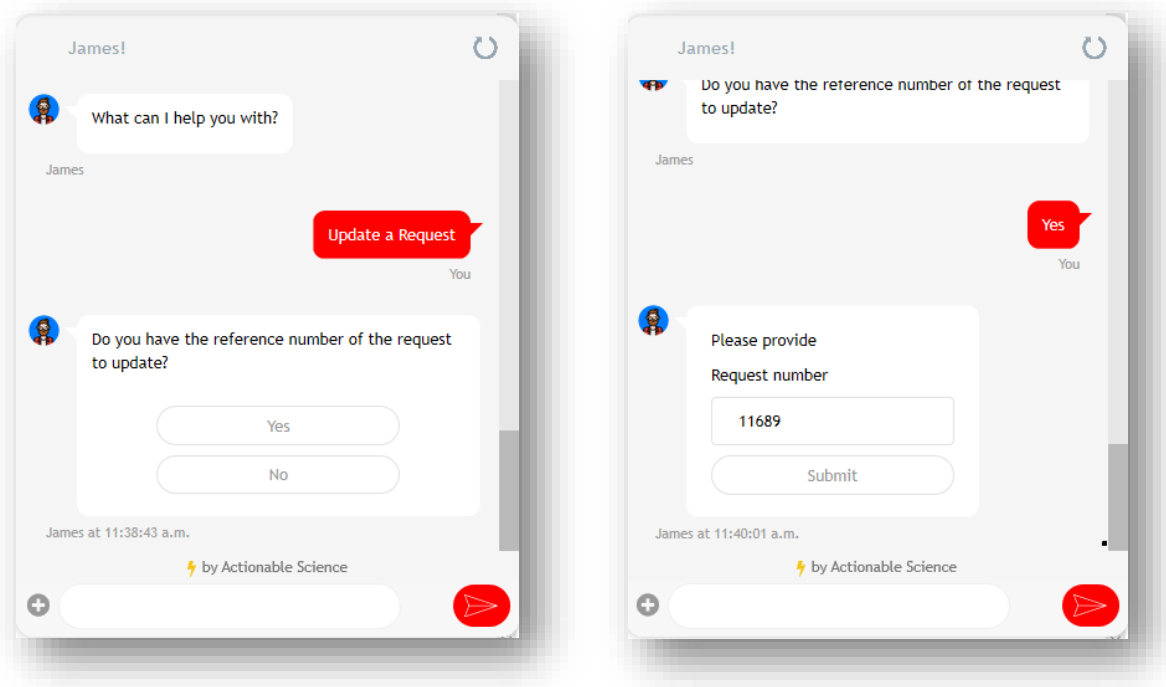


If the user chooses to update the request, they can then enter a memo and optionally close the request.

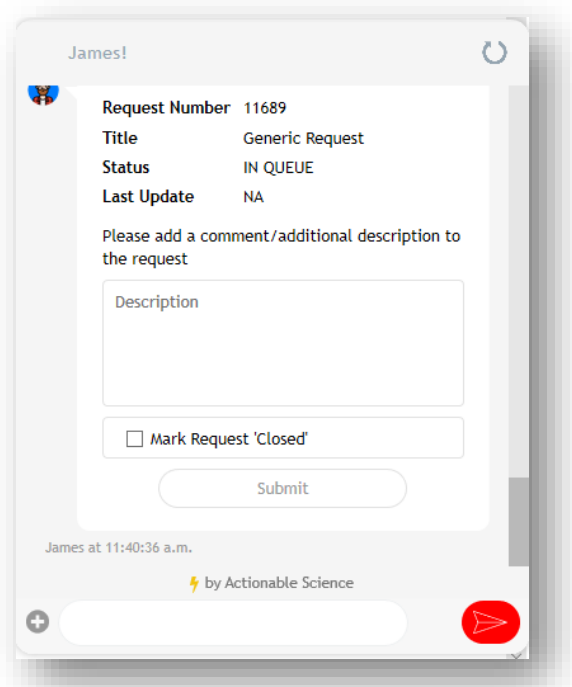


4.3. Update a Request

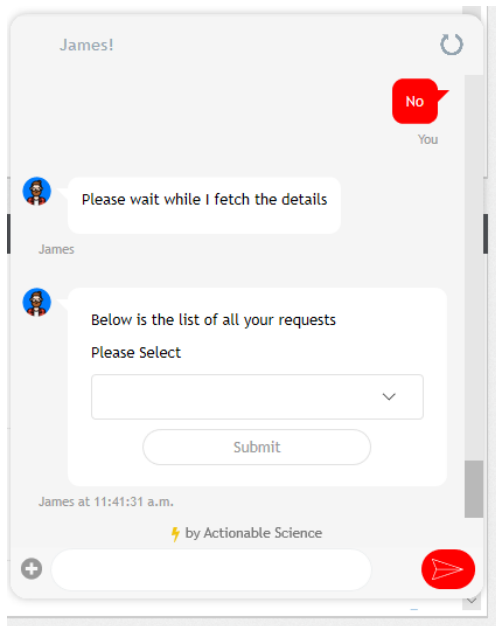
If the option to 'Update a Request' is selected, the virtual assistant will inquire if the user has a reference number for the request. If they do, then they can enter it as shown below.



The virtual assistant will then display all the properties of the request and the option to update and/or close it.



If the user does not have the reference number, then the virtual assistant will look up all the requests by that user and provide a dropdown list for selection:



Once the user selects the request, they will be shown the same request details and given the option to update the request and optionally close it.

5. APPENDIX A

5.1. HTML Code to be inserted in your Web Page

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />

<link id="JamesStyle" href="https://cdn.staging.virtualpeople.ai/style.css" rel="stylesheet">
  <link href="css/custom-style.css" rel="stylesheet">

  <script src="https://code.jquery.com/jquery-3.2.1.slim.min.js"
    integrity="sha384-
KJ3o2DKtkvYIK3UENzmM7KcKr/rE9/Qpg6aAZGJwFDMVNA/GpGFF93hXpG5KkN"
    crossorigin="anonymous"></script>
  <link href="http://ajax.googleapis.com/ajax/libs/jqueryui/1.8.17/themes/base/jquery-ui.css"
rel="stylesheet" type="text/css" />
  <script src="http://ajax.googleapis.com/ajax/libs/jquery/1.7.1/jquery.min.js"></script>
  <script src="http://ajax.googleapis.com/ajax/libs/jqueryui/1.8.17/jquery-ui.min.js"></script>
<title>Testing WebPage</title>
</head>

<body>
```

```

<div id="fake-james">
  <span id="pop-up" class="fake-image"></span>
</div>

<div id="myModal" class="modal">

  <!-- Modal content -->
  <div class="modal-content">
    <div class="modal-header">
      <span class="close">&times;</span>
      <h2>ServicePRO Login widget loading... <br /></h2>
    </div>
    <div class="modal-body">

      <div id="serviceprologin"></div>
    </div>
  </div>
</div>
<div id="james-widget" class="bot-wrap">
  <div class="bot-icon-new" style="display: none;">
    <span class="open-icon"></span>
    <span class="close-icon"></span>
  </div>
  <script id="JamesWidget" src="https://cdn.staging.virtualpeople.ai/widget.js"></script>
</div>
  <script>
function tokenReceved(token) {
  $('#myModal').hide();
  $('#fake-james').hide();
  if ($('#RememberMe').is(":checked"))
  {
    localStorage.setItem("token", token.Token);
    localStorage.setItem("tenantId", token.JamesTenantId);
    localStorage.setItem("jamesActiveURL", token.JamesActiveEnvironmentURL);
  }
  $('#JamesStyle').attr('href', token.JamesActiveEnvironmentURL + '/style.css');
  $('#JamesWidget').attr('src', token.JamesActiveEnvironmentURL + '/widget.js');

  EmbeddableWidget.mount(token.JamesTenantId, token.Token);

  setTimeout(function () {
    $('.bot-icon-new').addClass('ch-tab');
    $('#chat-container').removeClass('close-bot');

  }, 2000);
}
$(document).ready(function () {
  var t = setInterval(function () {
    /*console.log($(".wc-chatview-panel"))*/
    if($(".wc-chatview-panel").length > 0) {
      $('.bot-icon-new').show();

```

```

        clearInterval(t);
    }
    //console.log("-----",$(".pull-left").text("James"));
    if($(".pull-left").text() == 'Chat') {
        $(".pull-left").text('James!')
    }
}, 500)

$(document).on('click', '.bot-icon-new', function () {
    $(".bot-frame").toggleClass("show-bot");
    $(".bot-icon-new").toggleClass("ch-tab");
    $(".wc-chatview-panel").removeClass("active");
});

var token = localStorage.getItem("token");
var tenantId = localStorage.getItem("tenantId");
var jamesActiveURL = localStorage.getItem("jamesActiveURL");
if (token === null) {
    $.ajax({
        url:
            'Your ServicePRO Web URL/Account/login?LoadWithoutLayout=true&tokenOnly=true',
        contentType: 'application/html; charset=utf-8',
        type: 'GET',
        dataType: 'html'
    })
    .success(function (result) {
        $(".modal-header").hide();
        $(".#serviceprologin").html(result);
        $(".#Domains option:contains("+$(".#hDomainName").val()+")").attr('selected', 'selected')
    })
    .error(function (xhr, status) {
        document.getElementById("serviceprologin").innerHTML = "ServicePRO ServicePRO Web is
under maintenance";
    });

$(document).on('click', '#pop-up', function () {
    $(".#myModal").show();
});

$(document).on('click', '.close', function () {
    $(".#myModal").hide();
});

$(document).keyup(function (e) {
    if (e.key === "Escape") {
        $(".#myModal").hide();
    }
});
}
else
{

```

```

    $('#JamesStyle').attr('href', jamesActiveURL + '/style.css');
    $('#JamesWidget').attr('src', jamesActiveURL + '/widget.js');
    $('#fake-james').hide();
    EmbeddableWidget.mount(tenantId, token);
  }
});




</script>
</body>
</html>

```

5.2. Folders to be copied from ServicePRO Web application to your website

For the James Widget plugin to be placed in your website, please copy the following folders from the “..\Integration\James” subfolder in your ServicePRO Web Application folder to your Website Root folder:

1. Integration\James\css
2. Integration\James\fonts
3. Integration\James\img

Name	Date modified	Type
 css	7/23/2020 10:25 AM	File folder
 fonts	7/23/2020 10:25 AM	File folder
 img	7/23/2020 10:25 AM	File folder

If your website already has these folders, please perform file copy from these folders to your website folders.

5.3. Changes in ServicePRO Web’s Config File

For the James Widget plugin placed in your website page to work correctly, please make the following changes in the Web.Config file for the ServicePRO Web Application (residing directly under the ServicePRO Web application’s main folder):

- 1) Under the <customHeaders> section, add/update the configuration key entries shown in red font below:

```

<customHeaders>
<clear/>
<add name="x-ua-compatible" value="IE=edge"/>
<add name="Access-Control-Allow-Origin" value="*" />
<add name="Access-Control-Allow-Methods" value="GET, PUT, POST,
DELETE, OPTIONS" />
<add name="Access-Control-Allow-Headers" value="Content-Type,

```

Content-Range, Content-Disposition, Content-Description, x-requested-with"

/>

</customHeaders>

- 2) Under <system.web> section, add the new configuration key entry given below:

<customErrors mode="Off"/>