

# **CA Service Management**

Office Hours

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# Webcast [Part 2/2] "Elevating Employee Experience with Service Point"

- Part 1 <u>Service Point demo of IT & non-IT use cases</u>
- Part 2 Tips & Tricks to configure and customize Service Point & Virtual Analyst



# **Common Modifications & Configurations for Service Point**

# **Modifying Service Point UI look and feel**

Common UI alterations (minor CSS changes background image, font color, or adding (static) URLs in the UI)

#### Earlier.....

These customizations were lost when applying patches/upgrades

#### Now....

- Externalized UI styling folder for customers to introduce custom styles, this externalized file will not be overridden during patching/upgrading
  - 1. Access "casm.html" file from the xFlow folder in the server having xFlow installed
  - 2. Uncomment the line < link rel="stylesheet" href="custom.css">
  - Create new file "custom.css"
  - 4. Define your **own CSS class** to **override** the system's default CSS class
  - **5. Refresh** browser cache for the changes to reflect

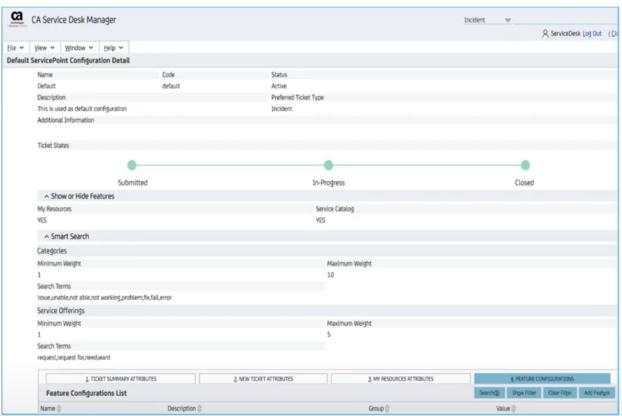
#### Note:

- This will be available from **RU17** and onwards. Customers on versions earlier than RU17 can add the line < link rel="stylesheet" href="custom.css"> in casm.html and follow steps 3-5.
- Extensive CSS changes can disrupt the UI and is not recommended



# **Managing Service Point capabilities through OOTB configurations**

- Toggle or Options based configurations for easy administration of features
  - SDM -> Administration -> Service Point -> Configurations
- **Tenant-specific** configurations
- **Types of Configurations** 
  - Ticket related
  - Smart search
  - Home page
  - Virtual Analyst & Chat





#### **Ticket related configurations**

Preferred ticket type & Ticket State labels

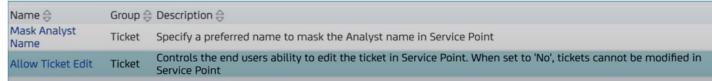


New Ticket & Ticket Summary Attributes (custom attributes can also be configured)



Mask Analyst Name

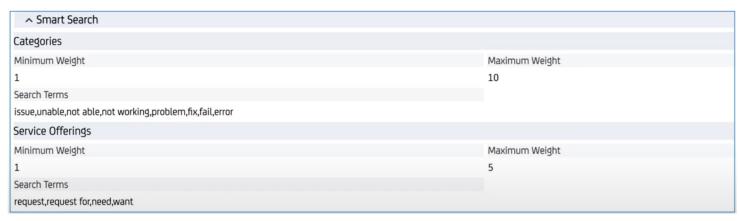
Allow Ticket Edit





### **Smart Search configurations**

Configure "search terms" to boost the efficacy of recommendations



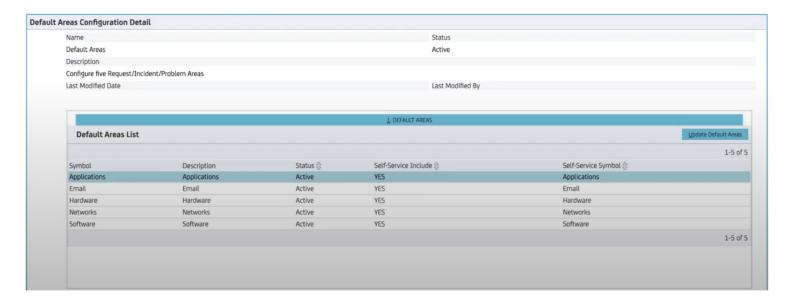
- Increase Search depth by adding fields in the Search Microservice
  - For ex: adding Service Offering description in the search.
  - Word of caution: Including more fields as Search parameters might adversely impact Search response time in SP
- Enable Fuzziness to manage search effectiveness
  - Turned OFF by default
  - Configuration can be found in SearchMicroservice -> application.conf file
- Other configuration options (SDM->Administration->xFlow Interface->General)
  - searchable columns for object types (contact, tickets, KDs)
  - no. of suggested solution recommendations (default value is 20)
- Well-defined & user-friendly name and description of "self-service" Categories & Service Offerings (Options and

### **Service Point "Home Page"**

- Enable/Disable
  - Service Catalog
  - My Resources



Quick Categories/Default Areas (SDM-> Administration -> Service Point -> Default Areas)



- Additional Information
  - Section under the Call icon to add any additional information
  - URLs can also be configured in this section



# **Configuring & Customizing Virtual Analyst**

# **Managing Virtual Analyst through OOTB configurations**

- Toggle the Virtual Analyst ON/OFF
- Modify VA's look & feel
  - Virtual Analyst Name & Icon
  - Launch Text
  - Greeting format
- Choose between Template based ticket creation or Auto categorization
- Configurations can be found at SDM->Administration->Service Point->Configurations->Feature Configuration tab

Name ⇔	Group 🚔	Description ⊕
Chat with Analyst	Chat	Enable or Disable Chat with an Analyst in Service Point. This option controls the end user's ability to initiate chat with an analyst
Chat Engine	Chat	An Option to choose between Virtual Analyst and Live Chat support
Virtual Analyst Launch Icon	Chat	Specifies the icon used for launching chat in Service Point. Upload an icon to override the default one
Virtual Analyst Launch Text	Chat	Add personalized text to initiate chat
Virtual Analyst Name	Chat	Add personalized name of the Virtual Analyst Service Bot
Virtual Analyst Create Request Template	Chat	Template used while creating a request through Virtual Analyst
Virtual Analyst Greeting	Chat	Option to choose the Greeting format as L,M or F,M or L,F or L or F or M e.t.c. Last Name(L), Middle Name(M), First Name(F)
Virtual Analyst Create Incident Template	Chat	Template used while creating an incident through Virtual Analyst
Virtual Analyst Auto Categorization	Chat	When Enabled, Virtual Analyst uses smart search categorization to identify the new ticket's category. When disabled, template ticket's category is used for the new ticket



# **Customizing & Training the Service Bot**

#### **Customization scenarios:**

- 1. Configure VA with custom data
  - For ex: custom ticket IDs with prefix/suffix
  - Retrain with your organization's ticket related data
- 2. Adding custom intent(action) to VA
  - In addition to OOTB intents, intents can be added and trained for in the VA
  - Intents involving Simple text responses as well as HTML formatted responses can be configured
- Files to be aware of for achieving the customizations
  - domain.yml Defines the universe in which VA operates. It specifies the intents, entities, responses and actions the bot should know about.
  - nlu.yml Consists of example user utterances categorized by intent, used for training the VA's NLU.
  - stories.yml Stories represent a conversation between a user and VA. They are a type of training data used to train VA's dialogue management.
  - intent\_mapper.cfg (Collaboration Microservice) Configuration used by system to map intents from the bot to the action that
    it needs to perform. It has also configurations to customize responses for an intent.
  - entity\_mapper.cfg (Collaboration Microservice) Defines configuration to map data(like Ticket ID, Urgency etc) in the system with entity information from the user utterance.



# Adding custom intent to VA

- Use Case: Frequently Asked Questions
- Define Intent (show\_faq) in domain.yml and add training data for the intent in nlu.yml.
- Define the action(utter\_show\_faq) that the bot should perform for this intent in domain.yml.
- Simple Response
  - Add response(s) to domain.yml under responses node with the above action name(utter\_show\_faq).
  - Write a story in stories.yml to map the above defined intent with action.
  - Retrain the bot.

#### HTML Formatted Response

- Create a response file(faq.txt) under collabMS/conf/vafiles/<locale> and define the response in it.
- Add a new configuration node with our intent name in collabMS/conf/intent\_mapper.cfg with intent and response details.
- This configuration takes precedence over the simple responses from bot.
- Restart the xFlow Services



# Resources

#### **Service Point:**

- Customising Service Point Appearance
- Manage Features
- Manage Smart Search
- Manage Ticket Attributes

#### **Virtual Analyst:**

- Getting started with Virtual Analyst
- Configure Virtual Analyst in Service Desk Manager
- Customize the Virtual Analyst Responses

#### **Videos:**

- CA Service Management: Introducing ARIA (CASM Service Bot)
- CA Service Management: Introducing Service Point

#### **Training:**

Web based trainings for Service Point & Virtual Analyst are also available





# Thank you





