



CA Service Management

Office Hours

Richa Pathak

Karthik Masalchi

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Webcast [Part 2/2] *“Elevating Employee Experience with Service Point”*

Part 1 - [Service Point demo of IT & non-IT use cases](#)

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">`
 3. 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

The screenshot shows the CA Service Desk Manager interface for configuring the Default ServicePoint. The page includes a navigation menu, a title bar, and several configuration sections:

- Default ServicePoint Configuration Detail:** A table with columns for Name, Code, and Status. The default configuration is active and has a preferred ticket type of Incident.
- Ticket States:** A flow diagram showing the states: Submitted, In-Progress, and Closed.
- My Resources:** A section for Service Catalog, currently set to YES.
- Smart Search:** A section for Categories with a Minimum Weight of 1 and a Maximum Weight of 10. Search terms include "issue,unable,not able,not working,problem,fix,fail,error".
- Service Offerings:** A section for Service Offerings with a Minimum Weight of 1 and a Maximum Weight of 5. Search terms include "request,request for,need,want".

At the bottom, there is a "Feature Configurations List" table with columns for Name, Description, Group, and Value. The table is currently empty.

Ticket related configurations

- Preferred ticket type & Ticket State labels

Name	Code	Status	
Default	default	Active	
Description	Preferred Ticket Type		
This is used as default configuration		Incident	
Additional Information			
This section can be used to display any additional information on the Service Point UI.			
Ticket States			
	Submitted	In-Progress	Closed

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

1. TICKET SUMMARY ATTRIBUTES		2. NEW TICKET ATTRIBUTES		3. MY RESOURCES ATTRIBUTES		4. FEATURE CONFIGURATIONS	
Ticket Summary Attributes				Search	Show Filter	Clear Filter	Add Ticket Attribute
Sequence	Attribute Name	Attribute	1-6 of 6				
1	Urgency	urgency					
2	Category	category					
3	Configuration Item	affected_resource					
4	Call Back On	call_back_date					
5	Last Modified	last_mod_dt					
6	Resolved On	resolve_date					
			1-6 of 6				

- Mask Analyst Name
- Allow Ticket Edit

Name	Group	Description
Mask Analyst Name	Ticket	Specify a preferred name to mask the Analyst name in Service Point
Allow Ticket Edit	Ticket	Controls the end users ability to edit the ticket in Service Point. When set to 'No', tickets cannot be modified in Service Point

Smart Search configurations

- Configure “search terms” to boost the efficacy of recommendations

^ Smart Search	
Categories	
Minimum Weight	Maximum Weight
1	10
Search Terms	
issue,unable,not able,not working,problem,fix,fail,error	
Service Offerings	
Minimum Weight	Maximum Weight
1	5
Search Terms	
request,request for,need,want	

- 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 Option Groups)

Service Point “Home Page”

- Enable/Disable
 - Service Catalog
 - My Resources

^ Show or Hide Features	
My Resources	Service Catalog
YES	YES

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

Default Areas Configuration Detail				
Name	Status			
Default Areas	Active			
Description				
Configure five Request/Incident/Problem Areas				
Last Modified Date	Last Modified By			

1 DEFAULT AREAS				
Default Areas List				Update Default Areas
1-5 of 5				
Symbol	Description	Status	Self-Service Include	Self-Service Symbol
Applications	Applications	Active	YES	Applications
Email	Email	Active	YES	Email
Hardware	Hardware	Active	YES	Hardware
Networks	Networks	Active	YES	Networks
Software	Software	Active	YES	Software
1-5 of 5				

- 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



