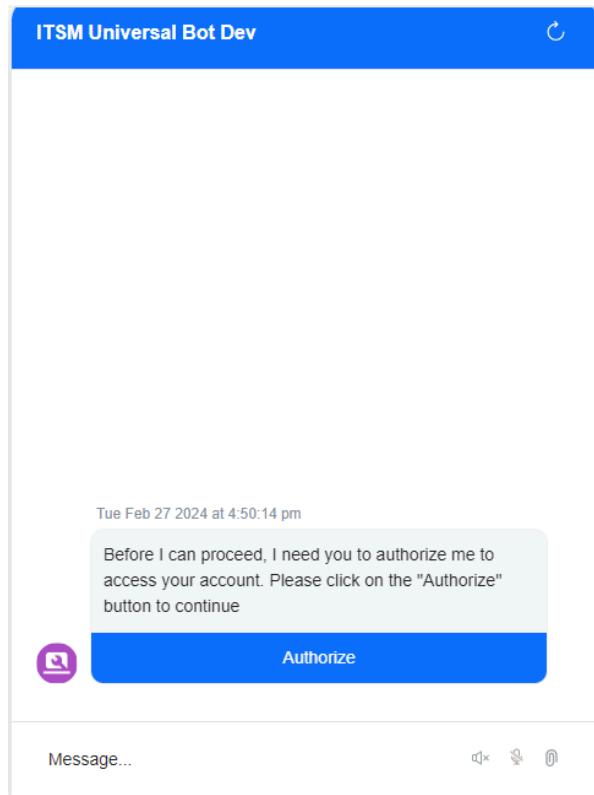


Basic instructions to be followed

- All changes need to be done for the digital channel (web SDK), no channel integration is required as a part of this assignment.
- Bot builder: <https://demo-bots.kore.ai/botbuilder>
- Workbench: <https://demo-itassist.kore.ai/workbench/>
- To use Web SDK for testing please authorize using below credentials
 - shane.dawson/Kore@123



IT Assist Dev Bot

Username Or Email
shane.dawson

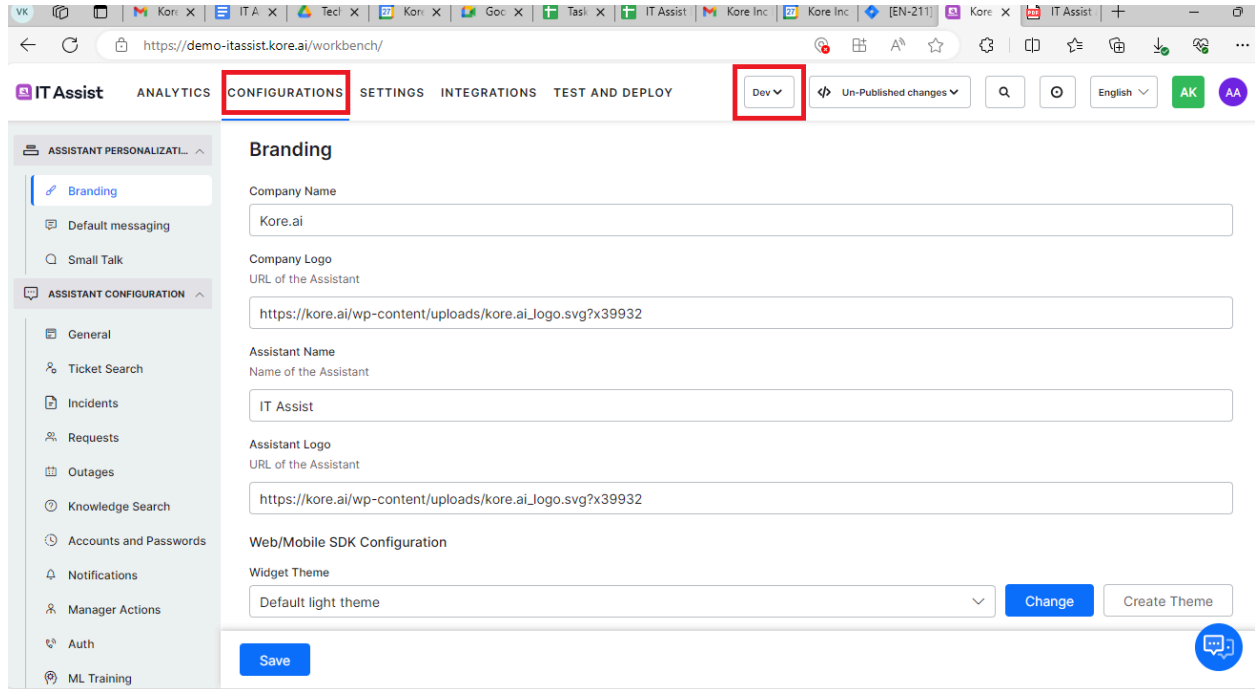
Password
••••••••

Proceed

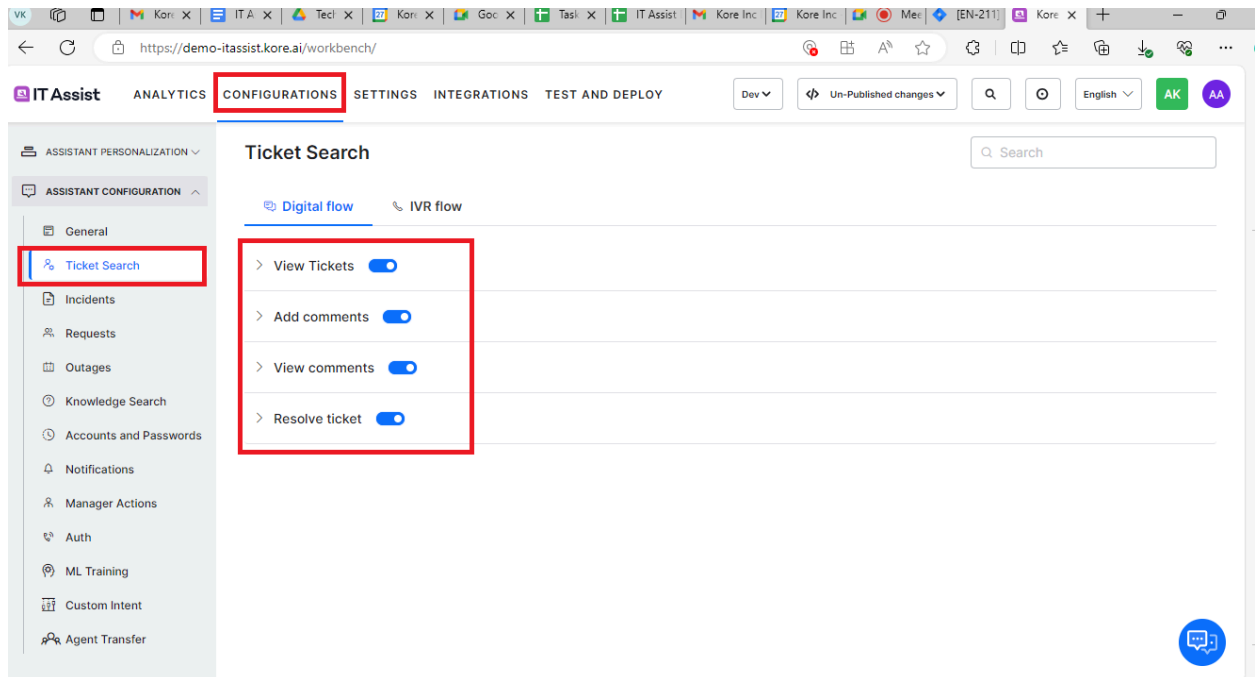
Must do changes in workbench before starting the assignments

It is mandatory to execute the following 5 steps before you proceed to do the assignment

1. Log into [workbench](#) with the provided credentials
2. Point the logical environment to “Dev”



3. Navigate to configurations tab, disable “Ticket Search” digital flow dialog



Screenshot of the IT Assist web interface showing the "Ticket Search" configuration page. The page is titled "Ticket Search" and has a search bar. The left sidebar shows the "ASSISTANT CONFIGURATION" menu with options: General, Ticket Search (selected), Incidents, Requests, Outages, Knowledge Search, Accounts and Passwords, Notifications, Manager Actions, Auth, ML Training, Custom Intent, and Agent Transfer. The main content area shows the "Digital flow" tab with four toggle switches: "View Tickets", "Add comments", "View comments", and "Resolve ticket". All four toggle switches are currently turned off and are highlighted by a red rectangular box.

4. Similarly disable "Create Incident", "Requests", "Outages", "Knowledge Search", "Accounts and passwords", "Manager Actions", "Agent transfer"

Screenshot of the IT Assist web interface showing the "Incidents" configuration page. The page is titled "Incidents" and has a search bar. The left sidebar shows the "ASSISTANT CONFIGURATION" menu with options: General, Ticket Search, Incidents (selected), and Requests. The main content area shows the "Digital flow" tab with one toggle switch: "Create Incident". This toggle switch is currently turned off and is highlighted by a red rectangular box.

ASSISTANT PERSONALIZATION ▾

ASSISTANT CONFIGURATION ▴

- General
- Ticket Search
- Incidents
- Requests**

Requests

Digital flow IVR flow

> Request Item ☐

ASSISTANT PERSONALIZATION ▾

ASSISTANT CONFIGURATION ▴

- General
- Ticket Search
- Incidents
- Requests
- Outages**

Outages

Digital flow IVR flow

> Show Outages ☐

ASSISTANT PERSONALIZATION ▾

ASSISTANT CONFIGURATION ▴

- General
- Ticket Search
- Incidents
- Requests
- Outages
- Knowledge Search**

Knowledge Search

Digital flow IVR flow

> Search Knowledge ☐

ASSISTANT PERSONALIZATION ▾

ASSISTANT CONFIGURATION ▴

General

Ticket Search

Incidents

Requests

Outages

Knowledge Search

Accounts and Passwords

Accounts And Passwords

Digital flow

IVR flow

> Accounts and Passwords ☐

ASSISTANT PERSONALIZATION ▾

ASSISTANT CONFIGURATION ▴

General

Ticket Search

Incidents

Requests

Outages

Knowledge Search

Accounts and Passwords

Notifications

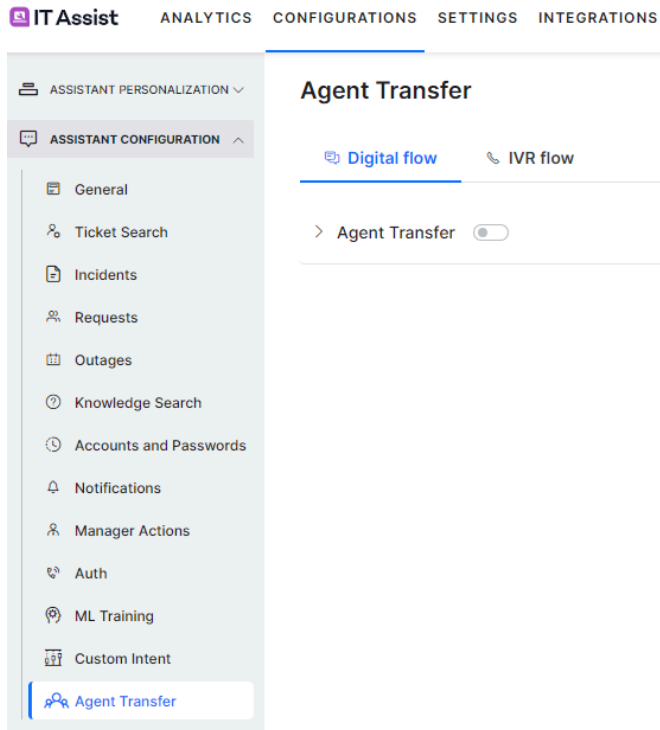
Manager Actions

Manager Actions

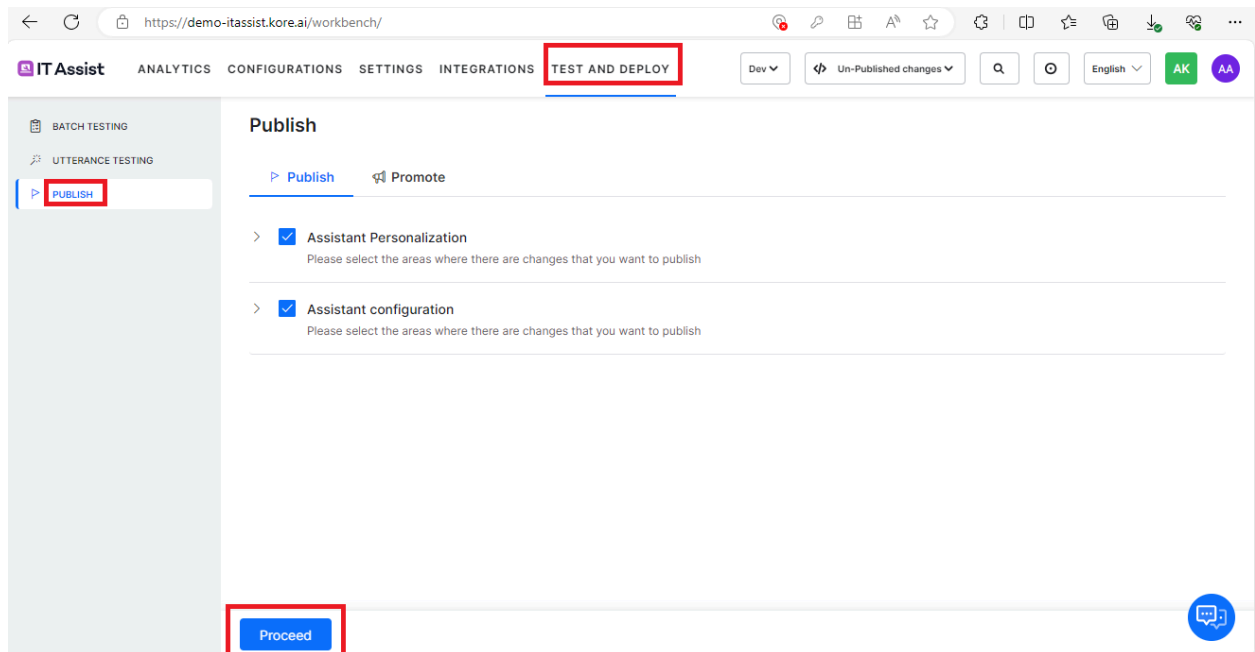
Digital flow

IVR flow

> My Approvals ☐



5. Navigate to “Test and Deploy” tab and Proceed to Publish



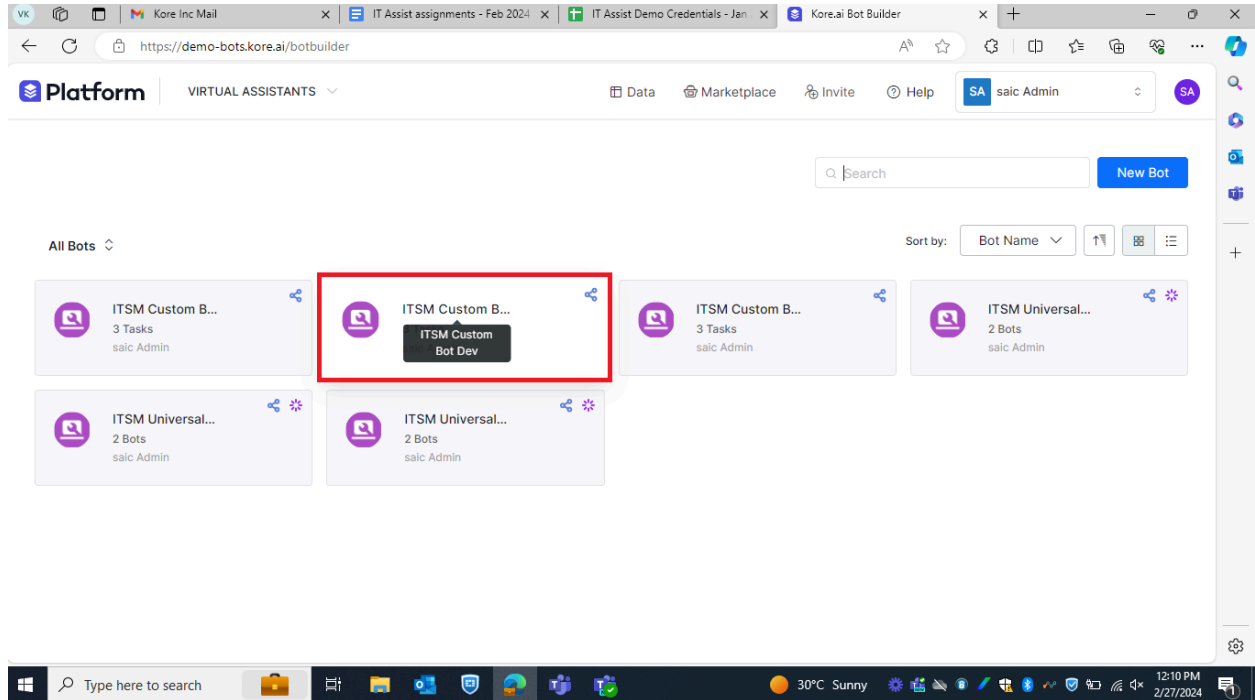
Files to be submitted at the end of the assignment

- For dialog building assignment submit web SDK screenshots for every dialog in a single document (naming convention below)
 - Document naming convention: <your name> DialogBuilding <organization name>
- For workbench assignment submit all the requested screenshots in a separate document capturing all changes (naming convention below)
 - Document naming convention: <your name> Workbench <organization name>
- For QA assignment submit the batch testing report generated and the screenshots in a single document (naming convention below)
 - Document naming convention: <your name> QA <organization name>

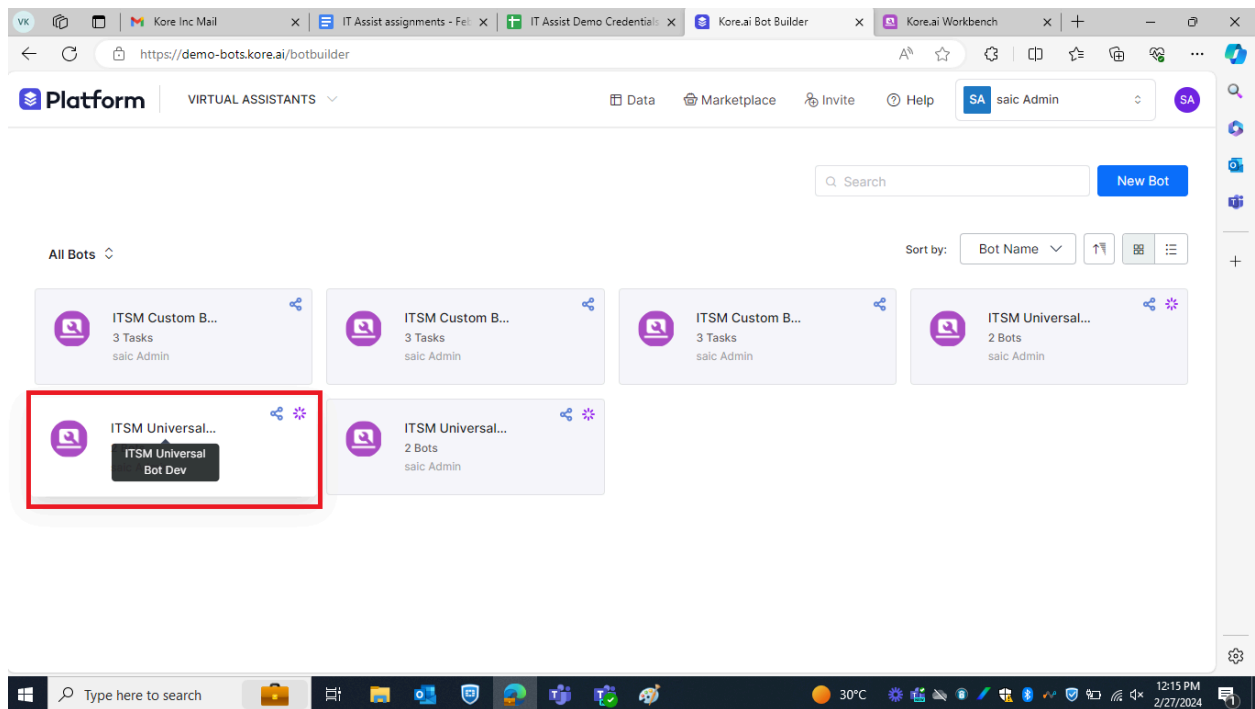
Dialog building Assignment

Instructions for dialog building

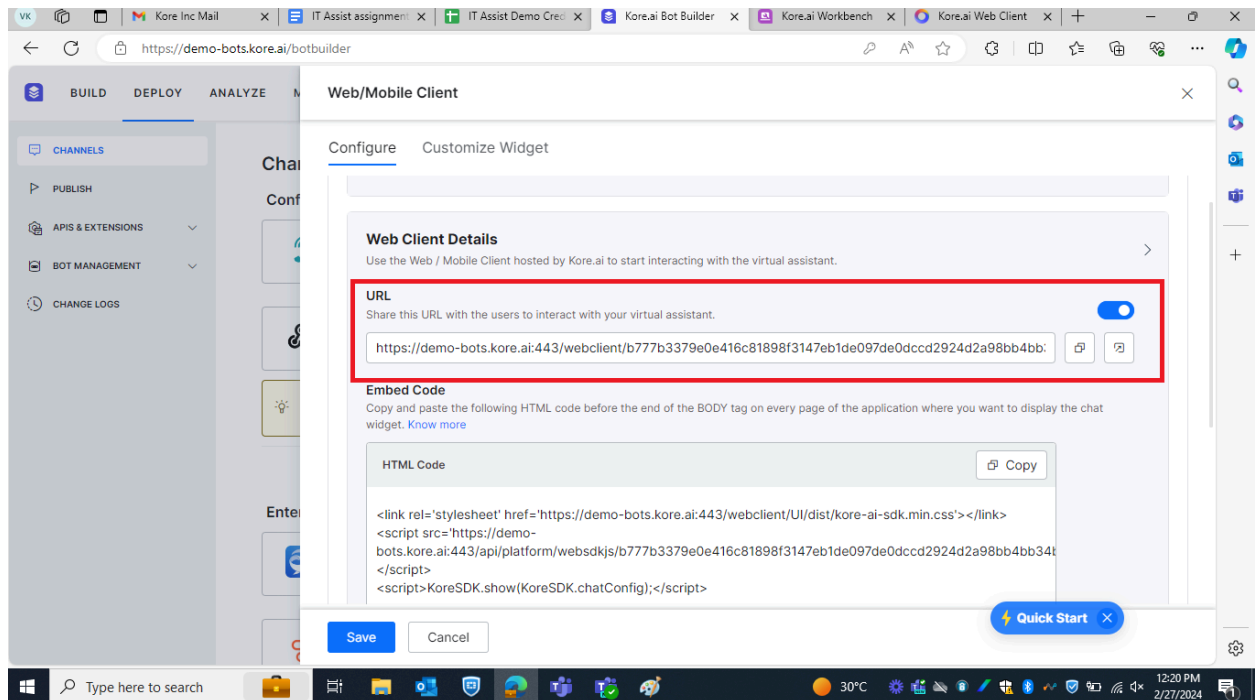
- Log in to [Bot builder](#) with the provided credentials
- Use the “ITSM Custom Bot Dev” to implement the dialogs in this assignment



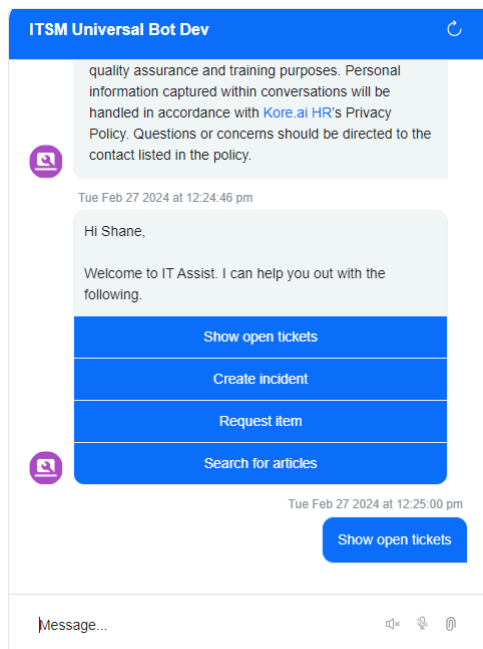
- After changes are complete publish both the “ITSM Custom Bot Dev” and the “ITSM Universal Bot Dev”



- Once you deploy, to view the changes made, use the web SDK channel from the “ITSM Universal Bot Dev”



- Submit web SDK screenshots (example as below) for every dialog in the assignment



Dialog building Assignment

1. Build a bot to simulate **IT Services**, personalize it with a name and icon of choice.
2. The bot should initiate a **welcome task** when the user connects to the bot.
3. The welcome task should greet the user and display the tasks it can perform:
Hello! Welcome to the ITSM Bot. Here are the tasks I can perform for you:

- a) Password/token Reset
- b) Issue Reporting
- c) Order IT Equipment
- d) Asset recovery and data backup for employee offboarding/ exit

4. Depending on the user's choice, the relevant dialog task should be triggered.

Password/Token Reset

- The task will prompt the user for two pieces of information: phone number and date of birth.
- Phone number should be validated using a regex.
- The bot should ask the user for the existing password which should be validated from the data table using the phone number.
- If the existing password does not match, bot should display an error message.
- Else, the bot should prompt the user for a new password and modify the password at the backend.

Issue Reporting

- This task will prompt the user for his employee ID (validated using a regex) and description of the issue.
- The issues can be related to software, printer, laptop.
- The bot saves the issue details in a data table and assures the user that the issue will be solved within a given timeframe.

Order IT Equipments

- This task will prompt the user for his Employee ID (validated using a regex).
- A list of IT equipment should be displayed for the user to select from.
- The user can request for a replacement of an existing equipment or order for an additional equipment.
- The user should be asked to describe the reason for the order.
- The request should be saved in a data table along with the current date and the bot should acknowledge that the request will be processed as soon as it is approved.

Show Issue Reported

- This task should ask for the employee ID and fetch the issue reported by him.
- In case, no issues are found reported by the employee, appropriate messages should be displayed.

Show Equipments Ordered

- This task should fetch the details of all the requests of all the IT equipment ordered by the employee.

Asset recovery and data backup for employee offboarding/ exit

- This task will prompt the user for his Employee ID (validated using a regex).
- Use a digital form to capture details such as relieving date (validate to be a future date), project name, checklist of assets to be submitted, a toggle for data backup required or not
- The bot saves the details in a data table and conveys to the user a date to complete the activity (one day before the relieving date)

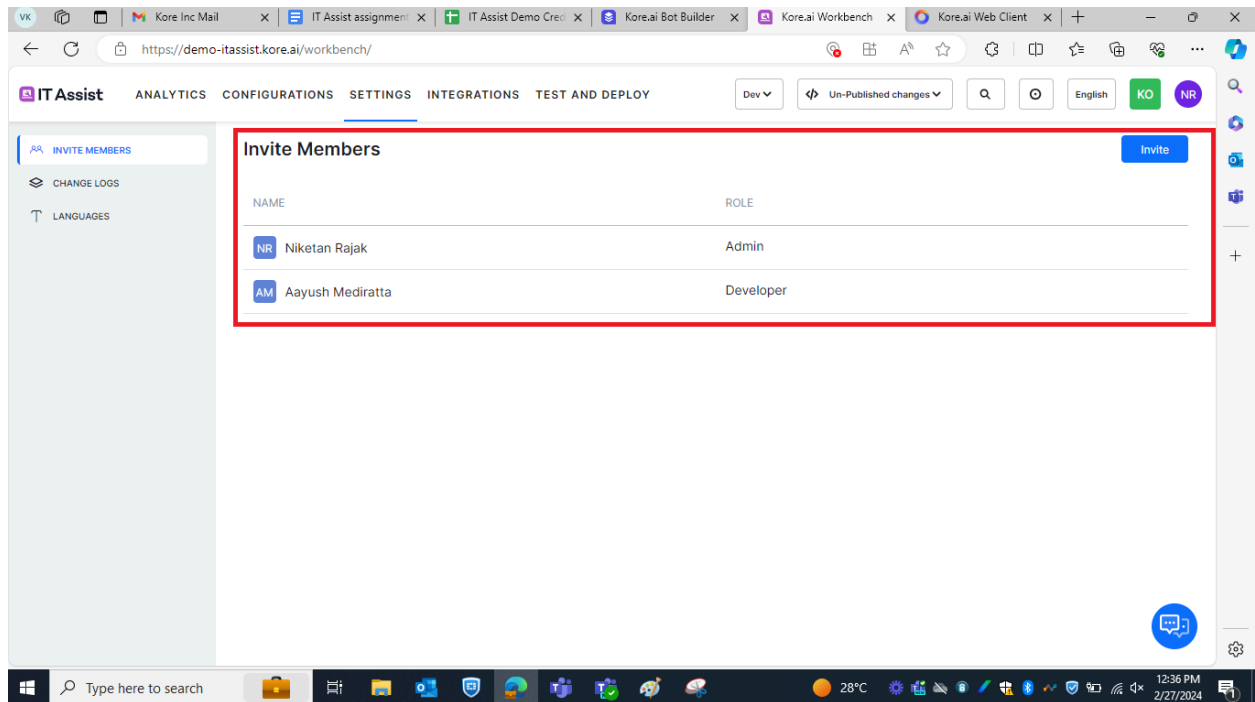
Workbench Assignment

Instructions for workbench assignment

- Log in to [workbench](#) with the provided credentials
- Document all the changes made for this assignment by attaching all the screenshots

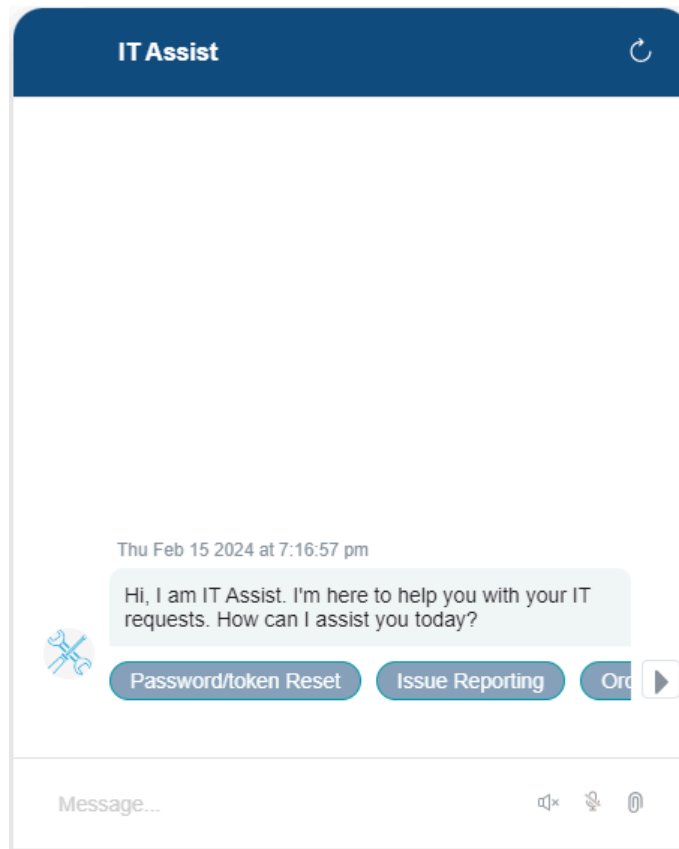
Workbench Assignment

Exercise 1: Invite a new member (use any email account you have access to, test gmail works) as a product and analytical user. Please submit the screenshot of the member invited. Verify which functionalities are accessible to each user.



Exercise 2: Make configuration changes in the workbench at various places and find out which are supported when you promote data from one logical environment to another.

Exercise 3: Incorporate appropriate configurations in the WB that reflect everything you see in the below screenshot. Please submit a screenshot similar to the below.



Exercise 4: Change the welcome message like above and provision quick buttons to the use cases mentioned. The Button should invoke the underlying Intents and other follow-up tasks as required. Please submit a screenshot for the same.

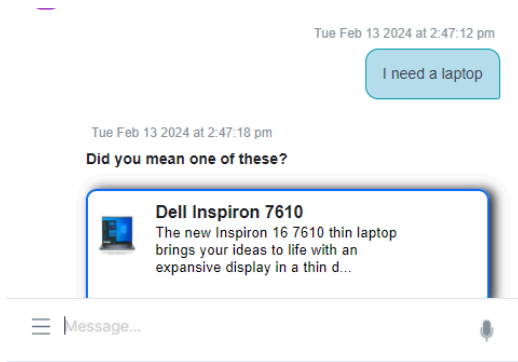
Exercise 5: Enable agent transfer confirmation for the logged in user who has provided all required information and bot is taking more than 90 seconds to respond. Please submit a screenshot for the change made.

Exercise 6: Provide few sample utterances in "Talk to bot" option in the workbench and trace them in the "NLP insights". Please submit a screenshot similar to the below.

Intent Found Intent Not Found Failed Task Performance Pinned Debug Log

Utterances (86) ▾	Intent ▾	TRAITS	User ID ▾	LANGUAGE	DATE AND TIME	⋮
> I need a laptop(19)	RequestItem	---	niketan.rajak13@kore.co...	en	02-13-2024, 2:47:14 PM	
> I get too much spa...	SearchKnowledge	---	niketan.rajak13@kore.co...	en	02-13-2024, 2:46:46 PM	
> my excel is not wor...	CreateIncident	---	ddd78887-13ac-4c5f-b...	en	02-13-2024, 2:42:30 PM	
> My excel is not wor...	CreateIncident	---	niketan.rajak13@kore.co...	en	02-13-2024, 2:35:25 PM	
> Show ticket numbe...	ViewTickets	ViewList	niketan.rajak13@kore.co...	en	02-13-2024, 2:24:34 PM	
> Show open tickets(3)	ViewTickets	ViewList	ddd78887-13ac-4c5f-b...	en	02-13-2024, 2:22:48 PM	
> I need a new lapto...	RequestItem	---	06e0b1e1-074a-4a67-b...	en	02-13-2024, 10:16:44 AM	

« « 1 2 3 4 5 » »



Exercise 7: Use the broadcast notification section to create a notification and send it to a particular user group. Please submit a screenshot of the broadcast notification created.

Exercise 8: Publish the bot changes

QA Assignment

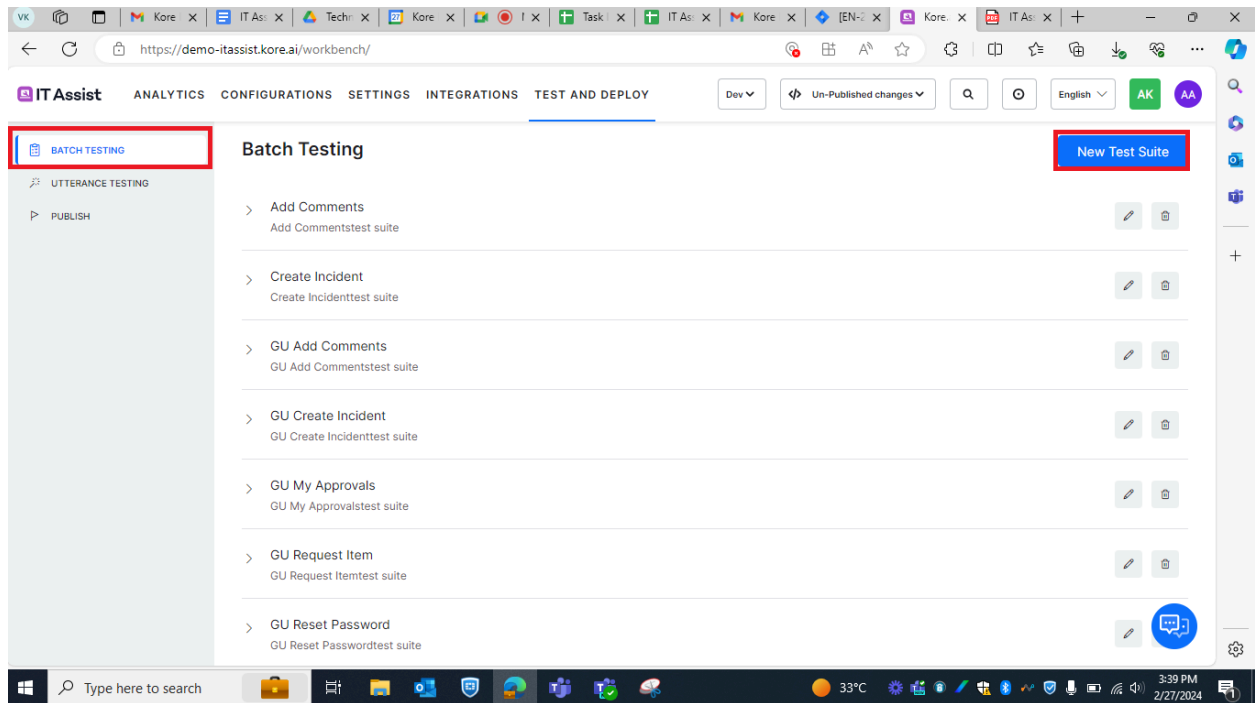
Instructions for QA Assignment

- Create a batch testing file with all 400 utterances
- Log in to [workbench](#) with the provided credentials
- Upload the batch testing suite under new test suite and run the suite
- Find below sample batch testing file covering various utterances (use for reference only).
Use the batch testing file format mentioned in the workbench itself

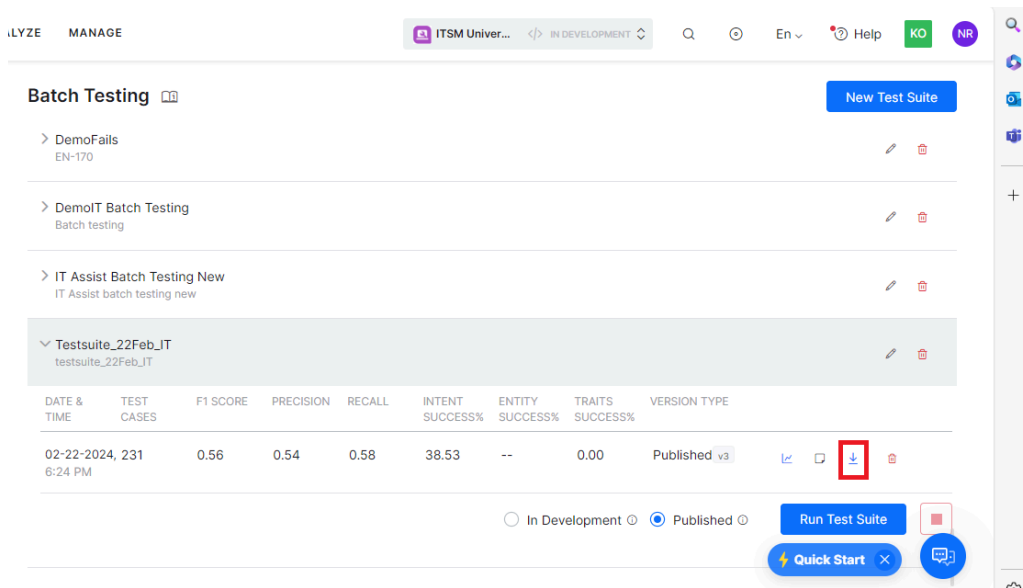
	A	B	F	G	H	I	J	K
1	input (User utterance)	intent	command	regular	very long	spelling error	punctuation	greeting + intent
40	Please provide the advance amount of my loan.	Get Loan Origination Amount			1			
41	What is the initial amount of my loan?	Get Loan Origination Amount			1			
42	Retrieve the principal amount for my loan.	Get Loan Origination Amount			1			
43	What was the initial amount of my loan?	Get Loan Origination Amount			1			
44	Can you provide me with the starting amount of my loan?	Get Loan Origination Amount			1			
45	I would like to know the borrowed amount for my loan.	Get Loan Origination Amount			1			
46	What is the loan amount that I originated?	Get Loan Origination Amount			1			
47	Please give me the investment amount for my loan.	Get Loan Origination Amount			1			
48	What was the issued amount of my loan?	Get Loan Origination Amount			1			
49	I need to know the funded amount of my loan.	Get Loan Origination Amount			1			
50	What is the advance amount for my loan?	Get Loan Origination Amount			1			
51	Loan origination amount?	Get Loan Origination Amount	1					
52	What's the principal amount?	Get Loan Origination Amount	1					
53	Initial loan amount?	Get Loan Origination Amount	1					
54	Borrowed loan amount?	Get Loan Origination Amount	1					
55	Investment amount please?	Get Loan Origination Amount	1					
56	Issued loan amount?	Get Loan Origination Amount	1					
57	Capital loan amount?	Get Loan Origination Amount	1					
58	Funded loan amount?	Get Loan Origination Amount	1					

	A	B	I	J	K	L	M	N
1	input (User utterance)	intent	spelling error	punctuation	greeting + intent	junk + intent	intent1 + intent2	
112	Hi, how's it going? I was wondering if you could provide me with a detailed breakdown of the loan origination amount for my personal loan, including any principal amounts, fees, or charges that were assessed at the time the loan was originated.	Get Loan Origination Amount			1			
113	Good evening, I hope you're doing well. Could you please help me find out the origination amount for my auto loan?	Get Loan Origination Amount			1			
114	Hello! How are you? I'm interested in learning more about the initial borrowed amount for my personal loan. Can you provide me with that information?	Get Loan Origination Amount			1			
115	Hi there, I hope you're having a great day. I'm curious about the investment amount that was made at the origination of my home loan, and I was hoping you could provide me with some details.	Get Loan Origination Amount			1			
116	Good afternoon! I'm trying to get a better sense of the funded amount for my auto loan, and I was wondering if you could help me with that.	Get Loan Origination Amount			1			
117	Hello, how's your day going? I'm looking to find out more about the loan origination amount for my personal loan, including any fees or charges that were included. Can you assist me with that?	Get Loan Origination Amount			1			
118	Hi there! I hope you're doing well. I was wondering if you could provide me with a detailed breakdown of the loan origination amount for my home loan, including any down payments or other contributions that were made at the time of origination.	Get Loan Origination Amount			1			
119	Good morning! How are you? I'm interested in finding out more about the initial borrowed amount for my personal loan, and I was hoping you could provide me with some details.	Get Loan Origination Amount			1			

- Below - how to upload the batch suite on workbench



- Download and submit the batch testing report after ensuring scores are >85%



QA Assignment

- For each use case in “a” create 50 test utterances (with and without entities) which include at least 6 utterances for each category detailed in “b”. Resulting in a total of 400 utterances covering all use cases and categories.
 - For all the use cases listed below.

- i. Create incident
 - ii. Access management
 - iii. Issue triage
 - iv. Request item
 - v. View tickets
 - vi. View approvals
 - vii. View outages
 - viii. Agent transfer
- b. Categories to be covered:
1. Command-like utterances (As a QA tester you need to account for utterances such as “outages?” from the users instead of a proper sentence structure like “I want to view outages”)
 2. Regular utterances (As a QA tester, you need to account for regular utterances like “I need a new laptop”, “I want to talk to an agent”, “Show all tickets”)
 3. Greetings + intent (As a QA tester, you need to account for utterances such as “Hello, I need a laptop”, “Hi, I want to view pending approvals”)
 4. Punctuations (As a QA tester, you need to account for utterances such as “Hi! I want - a laptop, a headset and a mouse”)
 5. Very long utterances (As a QA tester, you need to account for utterances such as “Since the past 2 days my excel has stopped working, I’m unable to launch the application. I want to know how I can get my issue resolved”)
 6. Spelling mistakes (As a QA tester, you need to account for utterances such as “create incidnt”, “raise tickt”, “tlk to agnt”)
 7. intent 1 + intent 2 (As a QA tester, you need to account for utterances such as “view tickets and planned outages”)
 8. junk + intent (As a QA tester, you need to account for utterances such as “Today, I wish to raise a ticket requesting for a new laptop”)
2. Create a new batch test test suite (with 400 utterances) and execute it.
 3. Analyze the results and understand how few samples are showing results as FP, TN, FN. Submit the batch testing report.
 4. Create functional test scenarios to test specific use cases. (To verify Bot flows along with Workbench configurations like prebuilt, agent transfer, default message, custom). Keep the screenshots of the settings done and bot flows displayed per setting.