Integrate Agent AI with ServiceNow Chat

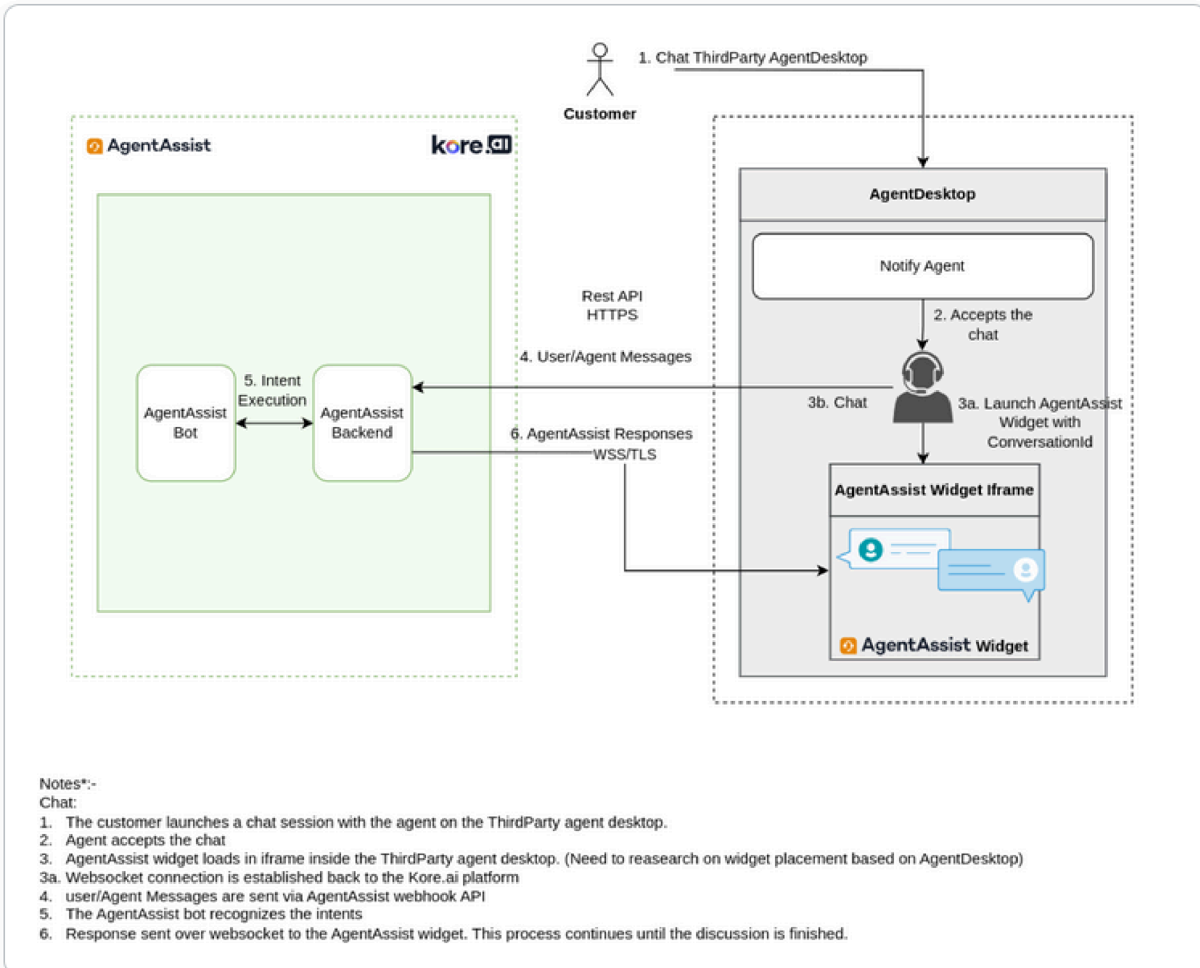
This document explains the integration process of Agent AI with Servicenow Chat.

Prerequisites

Before you begin the installation, make sure you have the following information:

- **SNOW developer instance (Washington DC)** set up and be able to receive chats on desktop. Please follow here.
- Agent AI Account with Web/Mobile channel enabled. (Have the bot credentials saved separately. You will need Bot ID, Client ID, Client Secret, Widget URL). Read Chat (for standalone Agent AI and for UXO, goto Flows and Chanel -> Digital -> Web/ Mobile Client -> JWT App Details)
- **Roles and Permissions:**
  - **For setup: Admin role**

Interaction between SNOW and Kore.ai Agent AI (Architecture Diagram)



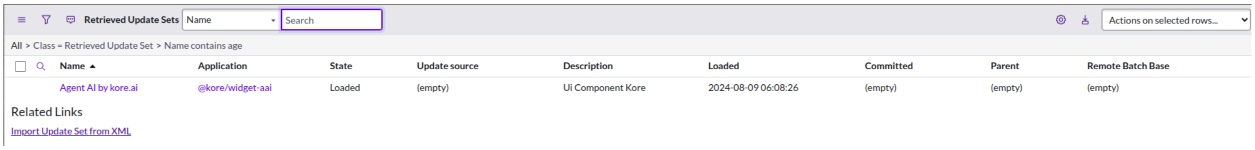
Steps to Setup Kore AgentAI (Chat) in servicenow sandbox

Step 1:

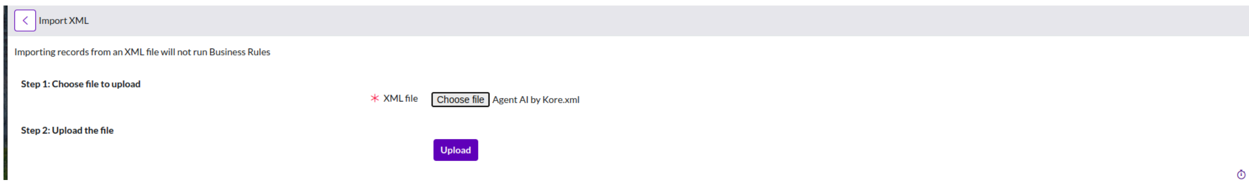
Download the Kore-Snow deployment [package xml](). Contact Kore.ai representative for the same.

Step 2: Login to your ServiceNow instance and import, preview and commit the package

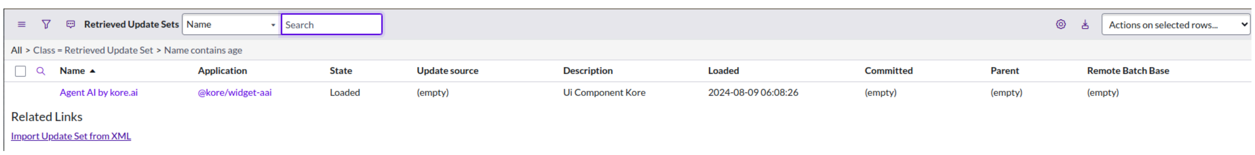
- Search in **All** > **filter** navigator as "**Retrieved Update Sets**" which is under "System Update Sets", and open it.



- Then in the "**Related Links**", click on "**Import Update Set from XML**"

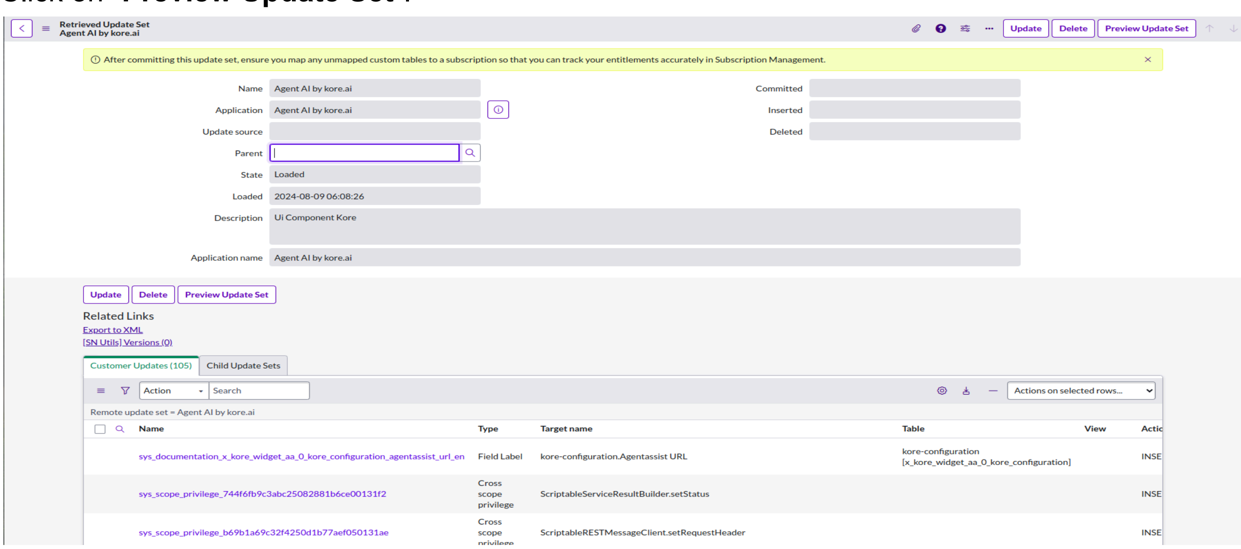


- After that open the update set "**Agent AI by Kore.ai" (This is the Kore Agent AI official name)**



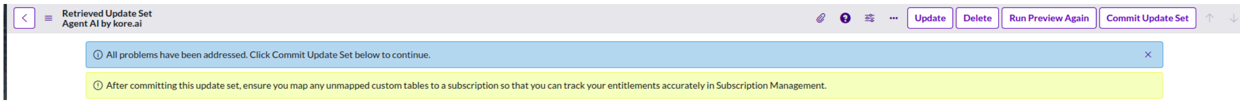
- # Preview update set

Click on "**Preview Update Set**".



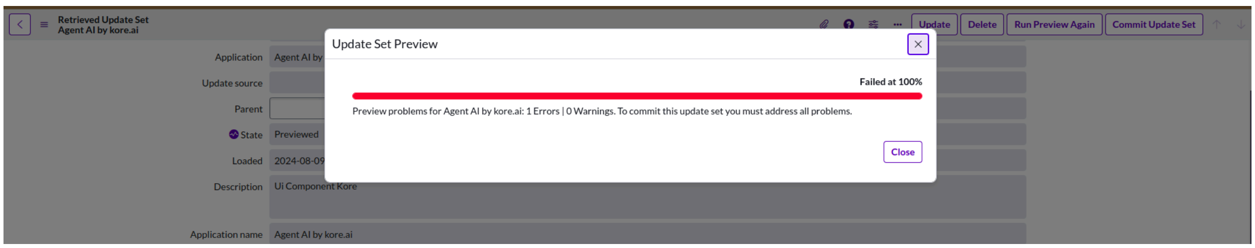
- Commit update set

After the successful preview, this option will be enabled. You need to click on “**Commit Update Set**”



Tips:

In case you are getting any errors(Ref Screenshot below) in the preview step, then do this.



Step required:

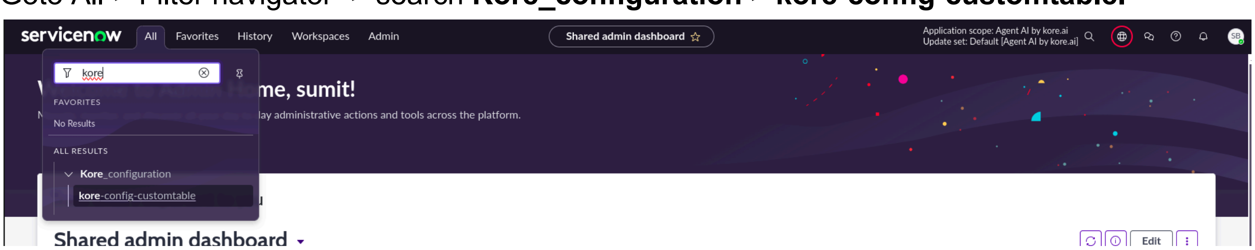
- First “**Close**” the above dialog.
- Goto **Update Set Review Problems,** select all of them
- In the right side, click on **Action on selected rows…** dropdown, and select **Accept remote update**.

Step 3: Setup AgentAI App configuration:

Application Name: **Agent AI by kore.ai**

Add Agent AI Bot configuration in ServiceNow custom table

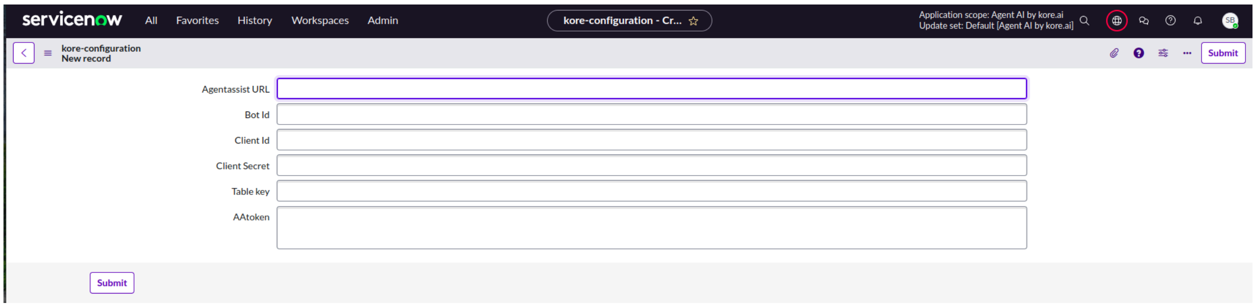
1. Change the scope of your servicenow from **Global** to **Agent AI by kore.ai**
2. Goto All-> Filter navigator -> search **Kore_configuration** > **kore-config-customtable.**



3. Click on **New**

4. Add Agentassist URL, Bot Id, Client Id, Client Secret (check here) , Table Key (Give the Table key: **koreai).**
5. Click **Save**.

Note- You must keep the **AAtoken** field empty, otherwise the widget will not load. The token field will be automatically populated at the runtime.



Step 4: Test your integration:

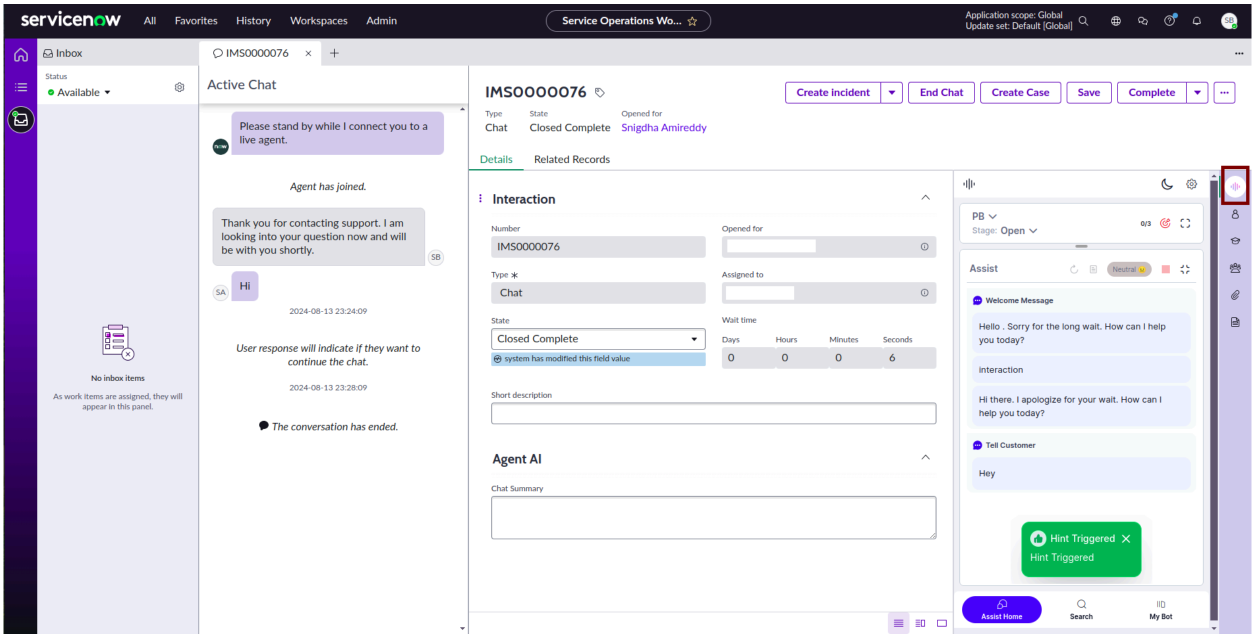
- **Agent**: Login to Agent Console with Agents' credentials (Agent specific permissions Sumit Biswas) and make yourself available to receive chat on SNOW desktop.

Add relevant Agent screenshots- desktop and interaction widget Sumit Biswas

- **Customer**: To initiate a chat from customer side login into **ESC** and initiate a chat.

Add a screenshot here as well. Relevant permissions.

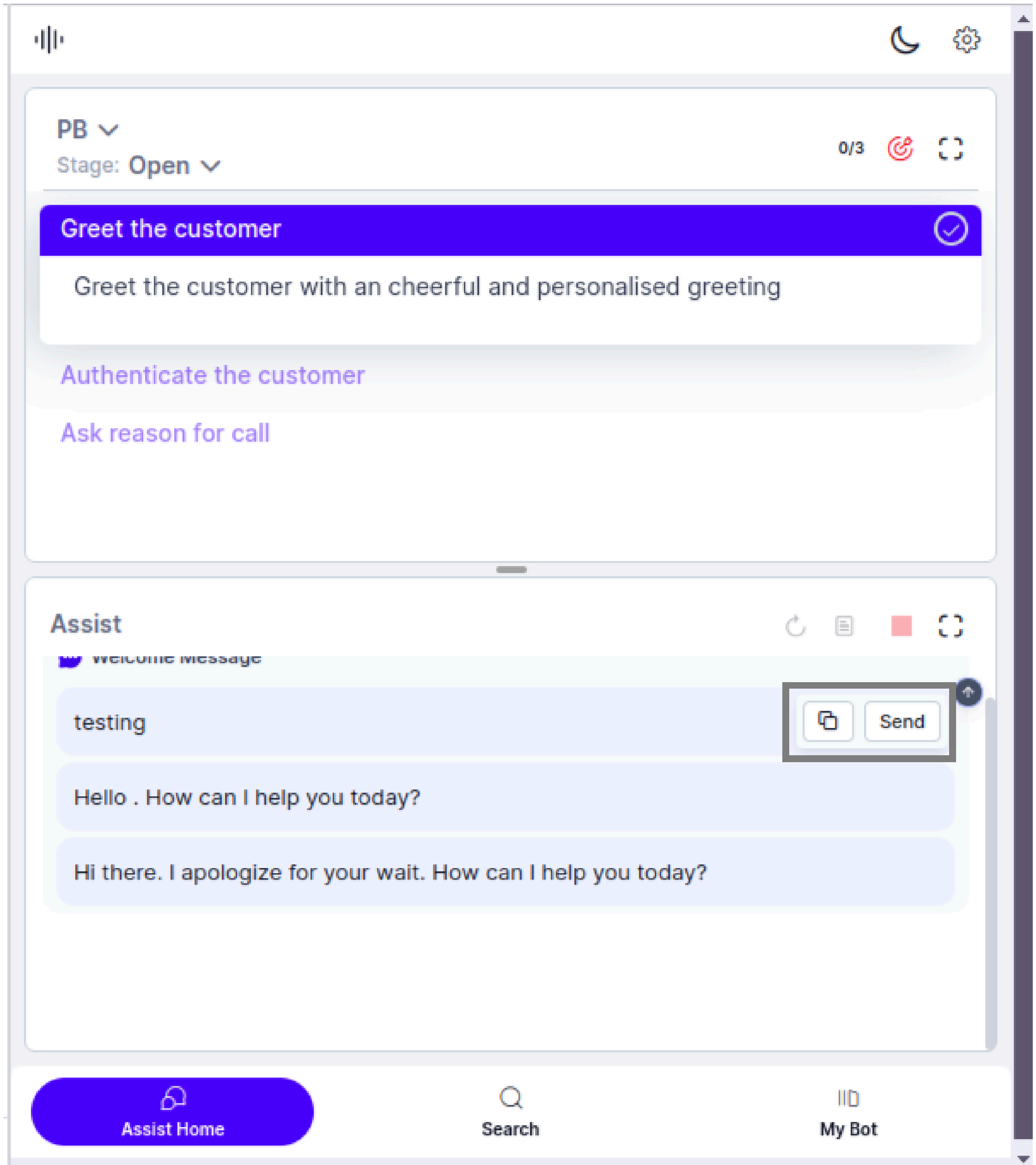
- Once the agent accepts the incoming chat, one interaction record page will open and the **Agent AI by Kore** will be the first icon on the contextual side panel.



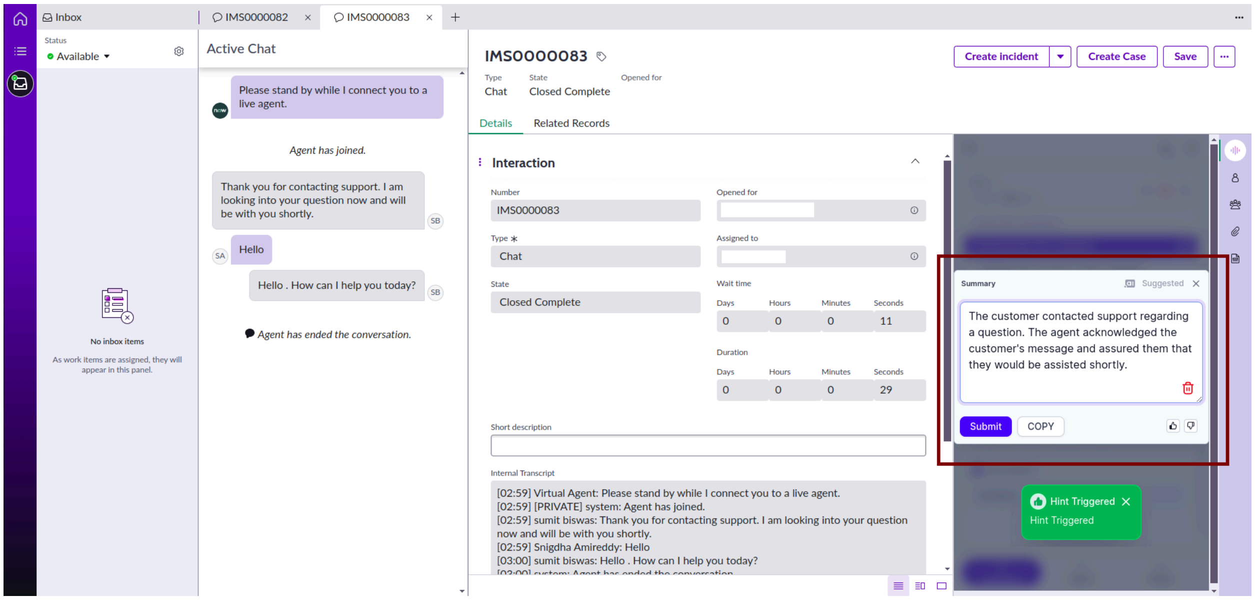
Step 5: Get to know Agent AI widget

From Integration perspective, along with all the features and capabilities of Agent AI (https://docs.kore.ai/agentassist/getting-started/introduction/), Agents on serviceNow have the flexibility to use below additional features)

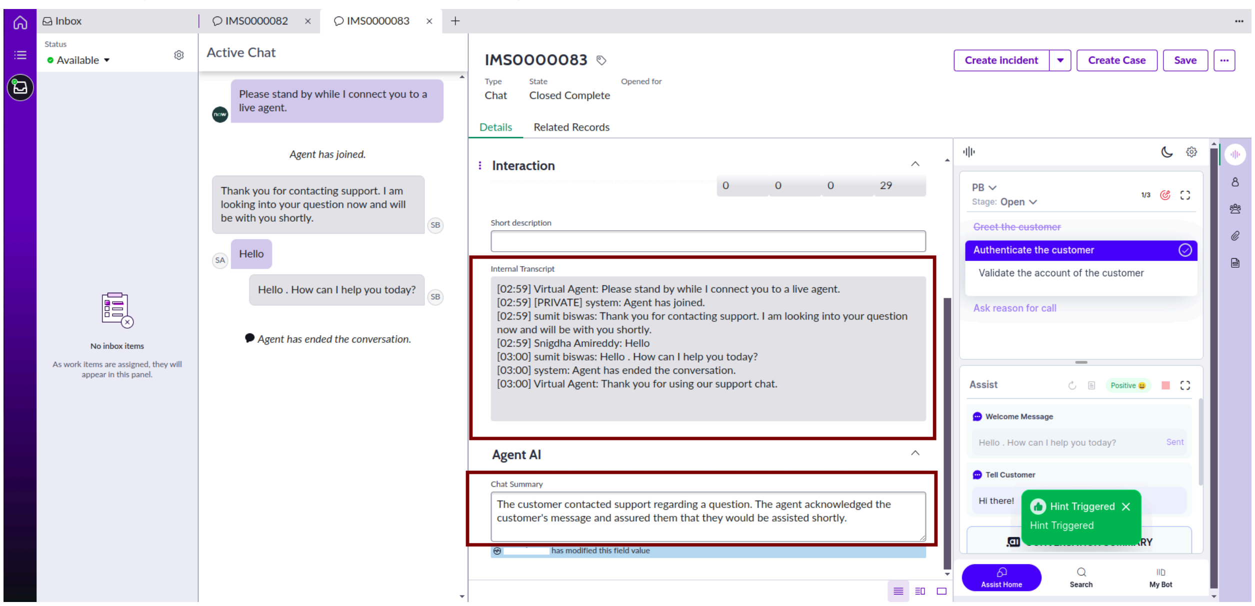
- **SEND/COPY Buttons:** Agents can use send and copy buttons on the Agent AI UI to directly send and copy data from Agent AI widget to the customer.



- **Conversation Summary / End Of Conversation**: At the end of the conversation, when **END Chat** button is used by Agents, the conversation summary will be popped up in the summary box under Agent AI. Agents have the flexibility to Copy this summary on their notepad or Save this summary. If the Save Summary option is used, then the summary gets saved inside the interaction table of that conversation.



- **Conversation logs:** Agents or Supervisor can check the transcript along with and Agent AI summary in the interaction record page –



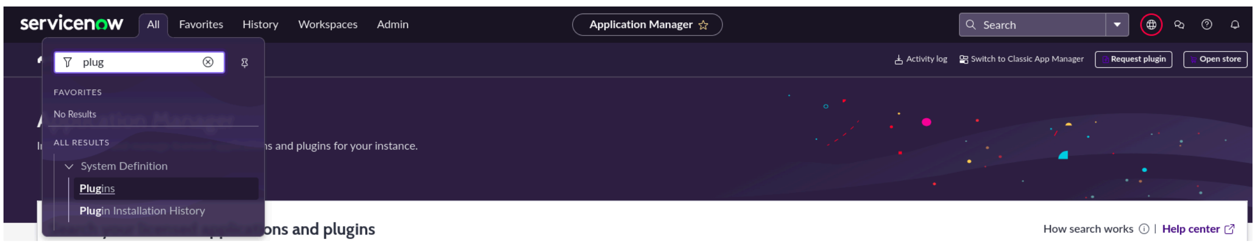
Setup of Agent Chat with AWA

Step 0: As an Administrator having sufficient permissions mentioned in pre-requisite to perform the below steps.

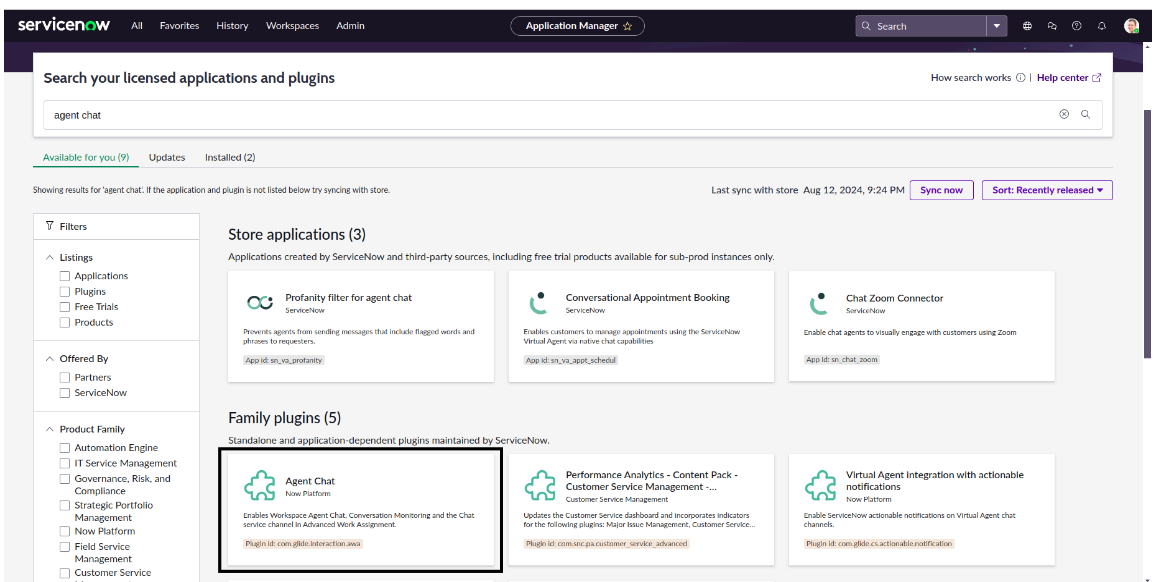
Step 1: Activating Agent Chat and **Advanced Work Assignment (AWA)**

When activating the Agent Chat plugin, AWA and Workspace will be activated by default.

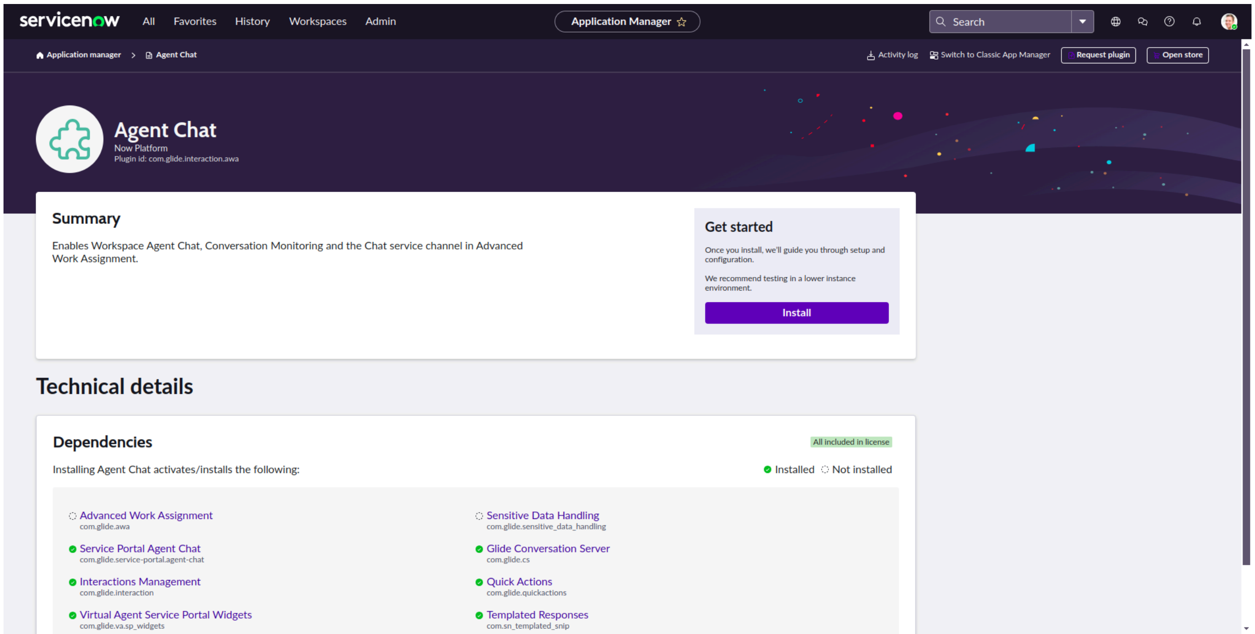
- Goto Servicenow homepage, **All**> **filter navigator box** and search with **Plugin** keyword, after that you will be redirected to **Application Manager** page.



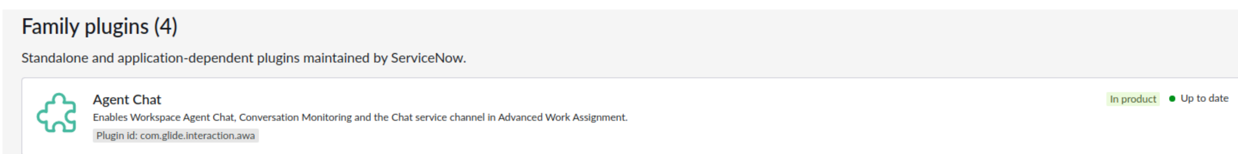
- Search for **Agent chat** and install the package. It will come under **Family Plugins.**



- For the first time users, there will be an install button. With this some other dependencies will also be installed.



- If Agent Chat is already installed, then it will look something like this:



Step 2: Implementation of Advanced Work Assignment (AWA)

The steps to configure AWA are below:

Configure service channels

Setting up a service channel involves multiple steps, including:

1. Configure the out of the box “chat” service channel.
2. Creating a queue for the service channel.
3. Creating an assignment rule for the queue.
4. Creating a group for the queue.
5. Associating the assignment rule with the queue.
6. Activating the service channel.

These steps are detailed in the following procedure. Once the service channel setup is complete, you can use AWA to assign newly created case tasks that:

- Are unassigned.
- Satisfy the conditions specified in the service channel.
- Have the configured AWA assignment group selected in the Assignment Group field on the Case Task form.

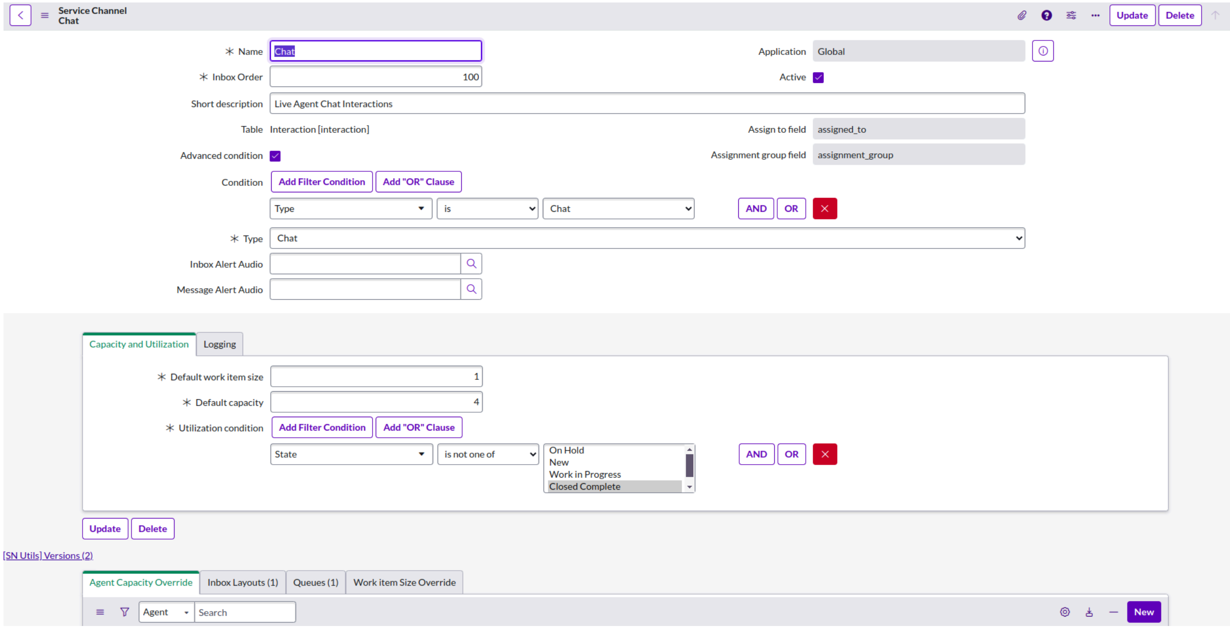
Procedure

1) Configure the out of the box “chat” service channel

a) Navigate to Advanced Work Assignment > Service Channels and click “Chat”.
b) Fill in the fields on the Service Channel form.
c) Click Submit.
The system adds the Case Task channel to the Service Channels list.

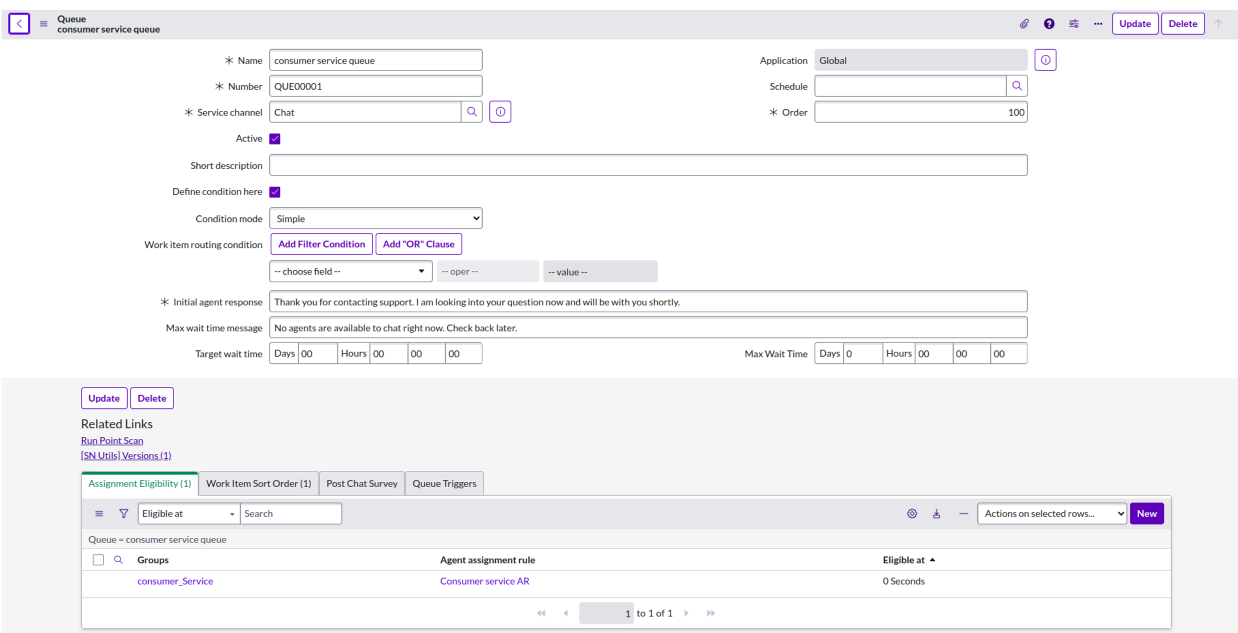
Note:

- Make sure **Type** is **Chat** is selected in the **Service Channel**>**Chat** homepage.
- Default work item size = 1
- Default capacity = 4 (Or number of concurrent chat you want to handle at max)
- In the below section of that page, there will be an option to assign the **Queues**, otherwise create a new one.
- Inside the Queue, in the below section one more mandatory fields have to be added
    - **Assignment Eligibility**
- Inside the Assignment Eligibility section, you need to assign a group(In case you don’t have one, you have to create it.)
- Inside the group you need to add all the agent users.



2) Create a queue for the case task service channel.

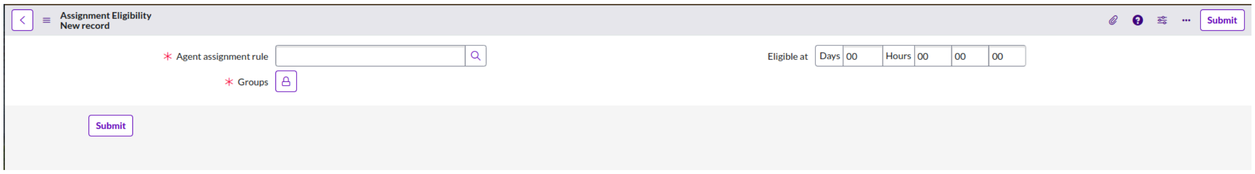
a) In the Queue related list, click New.
b) Fill in the following fields on the Queue form.
c) Click Submit.



3) Create an assignment rule for the Case Task Assignment queue.

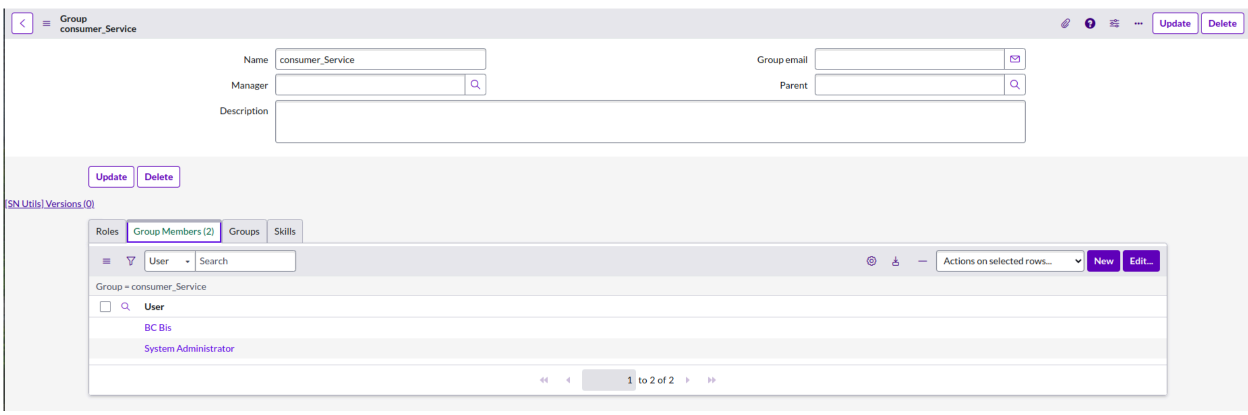
a) Navigate to Advanced Work Assignment > Assignment Rules and click New.

b) Fill in the fields on the Assignment Rule form.
c) Click Submit.



4) Create a group for the Case Task Assignment queue.

a) Navigate to Advanced Work Assignment > Management > Groups and click New.
b) Fill in the fields on the Group form and click Submit.
c) Click the group to display the Group form.
d) In the Group Members related list, add users to the group.
   The users that you add to the group for the Case Task Assignment queue require the following roles:
   i) Case task agent (sn_customerservice.case_task_agent)
   ii) AWA agent (awa_agent)



5) Associate the assignment rule with the Case Task Assignment queue.

a) Navigate to Advanced Work Assignment > Settings > Queues and click the Case Task Assignment queue.
b) In the Assignment Eligibility related list on the Queue form, click New.
c) Select the case task assignment rule in the Agent assignment rule field.
d) Select the case task assignment group in the Groups field.
e) Click Submit.

6) Activate the service channel.

a) Navigate to Advanced Work Assignment > Settings > Presence States.
b) Click the Available presence state and add the case task service channel to the Selected column.

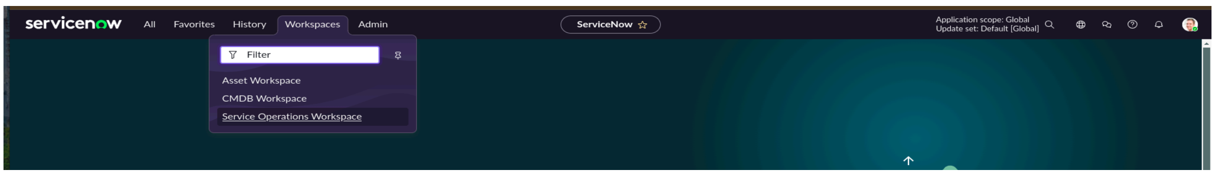
c) Click Update.

Test Agent Chat

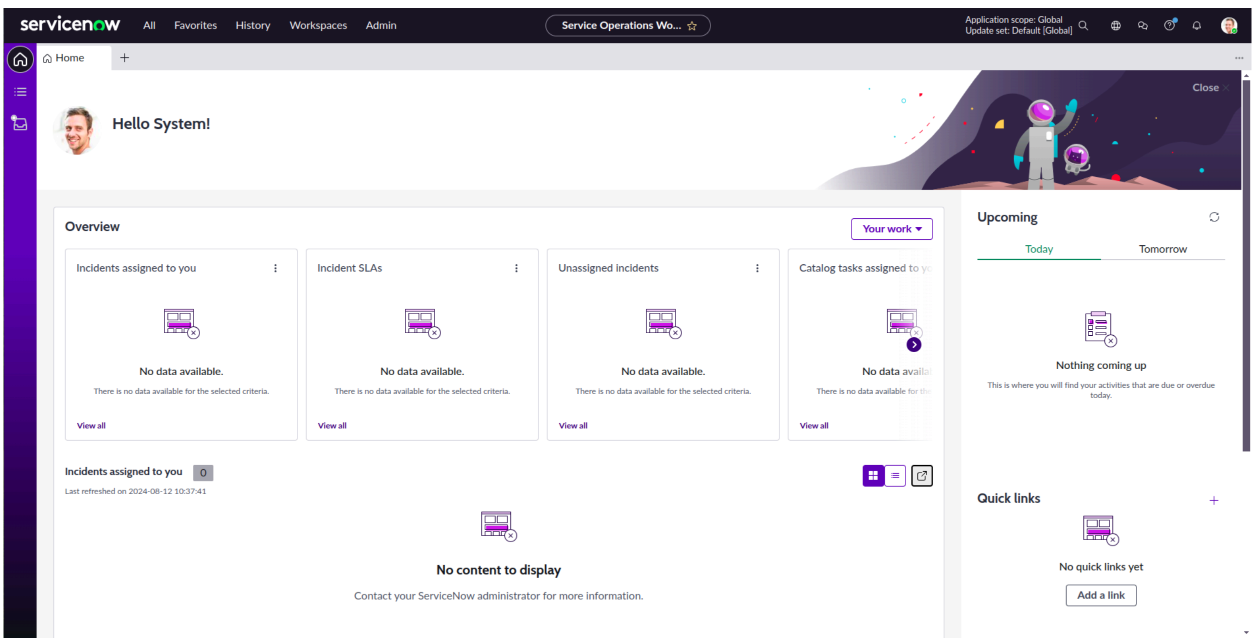
Step 1 and Step 2 is required to configure the Agent to be ready to accept incoming chats, whereas Step 3 is required to configure the customer side of the chat.

Step 1: Login to Agent Desktop

Navigate to the **Workspace** > **Service Operations Workspace.**

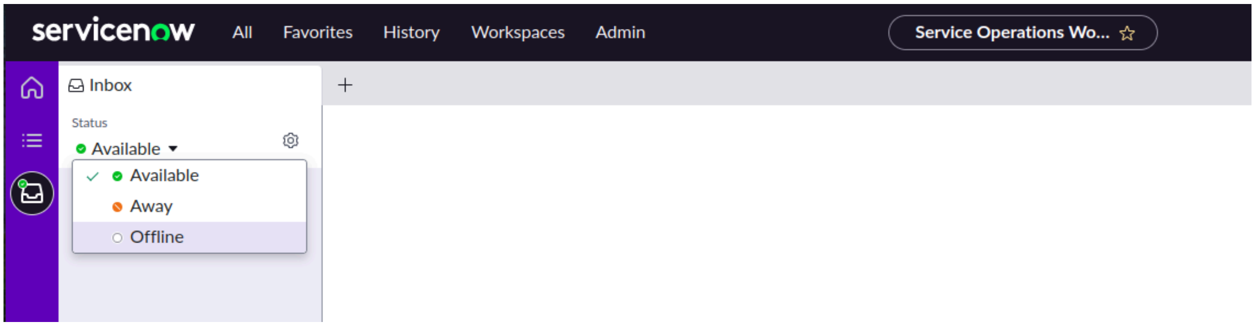


SOW Homepage:



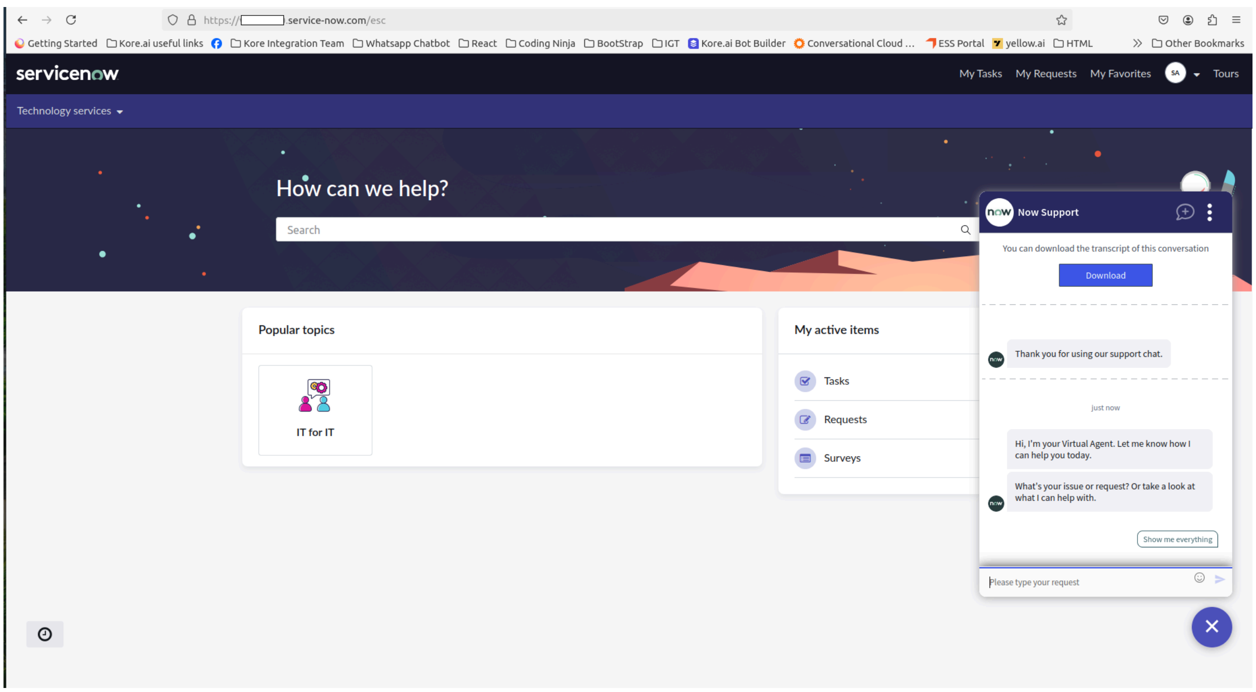
Step 2:

From the homepage of **Service Operations Workspace** click on the inbox icon and make the agent status as available.



Step 3: Login as Customer

Goto **Employee Center**/esc (https://<your snow instance name>.service-now.com/esc) of the same servicenow instance and login there. You will be considered as an end user who is initializing the chat.



From the above screenshot, in the chat box just click "**show me everything**", then click "**Live Agent Support**".

N.B - The Agent and end user(customer) should never be the same user while you are testing this.

Thereafter the all the available agents will be getting one incoming message like below:-