ZeaAI Studio

Functional Document

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CONTENTS

INTRODUCTION

Overview Of the Product

Welcome to ZeaAI Studio, where simplicity meets innovation in virtual assistance. Our web application offers users a straightforward conversational interface to engage effortlessly with a virtual assistant. Powered by advanced natural language processing (NLP), our assistant understands users' queries accurately and responds promptly.

ZeaAI Studio's assistant goes beyond basic interactions. It effortlessly retrieves information from uploaded files and executes various tasks, making it a versatile tool for streamlining workflows and boosting productivity. Whether you need help with a task or simply want to enhance your efficiency, ZeaAI Studio is here to make your virtual assistance experience seamless and efficient.

Experience the future of virtual assistance with ZeaAI Studio.

Objective

The objective of this document is to provide a comprehensive overview and functional specification of ZeaAI Studio, outlining its features, capabilities, and user interactions. It serves as a guiding resource for developers, stakeholders, and users alike, ensuring a clear understanding of the application's purpose, functionality, and implementation requirements. Through detailed descriptions and specifications, this document aims to facilitate effective development, deployment, and utilization of ZeaAI Studio, ultimately delivering a seamless and intuitive experience for users interacting with the virtual assistant.

Purpose

The purpose of this document is to outline the functionalities and attributes of the OpenAI Assistant Application, enabling users to interact with a virtual assistant empowered by OpenAI's advanced natural language processing capabilities.

Audience

This document is primarily intended for developers, project managers, and stakeholders engaged in the development and deployment of the OpenAI Assistant Application.

Scope

The scope of the ZeaAI Studio application includes features such as prompt and template text-based chat interactions, groups for efficient organization, a user-friendly dashboard for easy navigation, multi-theme options for customization, a text-based chat interface for intuitive communication, comprehensive chat logging capabilities, and robust user and role management functionalities to ensure secure access control and permissions management.

SYSTEM ARCHITECTURE

Frontend

The front-end of the application is constructed using React.js, a powerful JavaScript library renowned for its capability to create highly responsive and interactive user interfaces. Leveraging React.js enables us to craft a frontend that not only adapts seamlessly to various devices and screen sizes but also ensures smooth and engaging user experiences.

Backend

The backend of the application will be developed using .Net Core, a robust and versatile framework chosen for its ability to efficiently manage user requests and facilitate seamless communication with the OpenAI API.

Database

The application utilizes a MSSQL Server database to store user details and history, enabling personalized interactions with the virtual assistant.

Solution Architecture
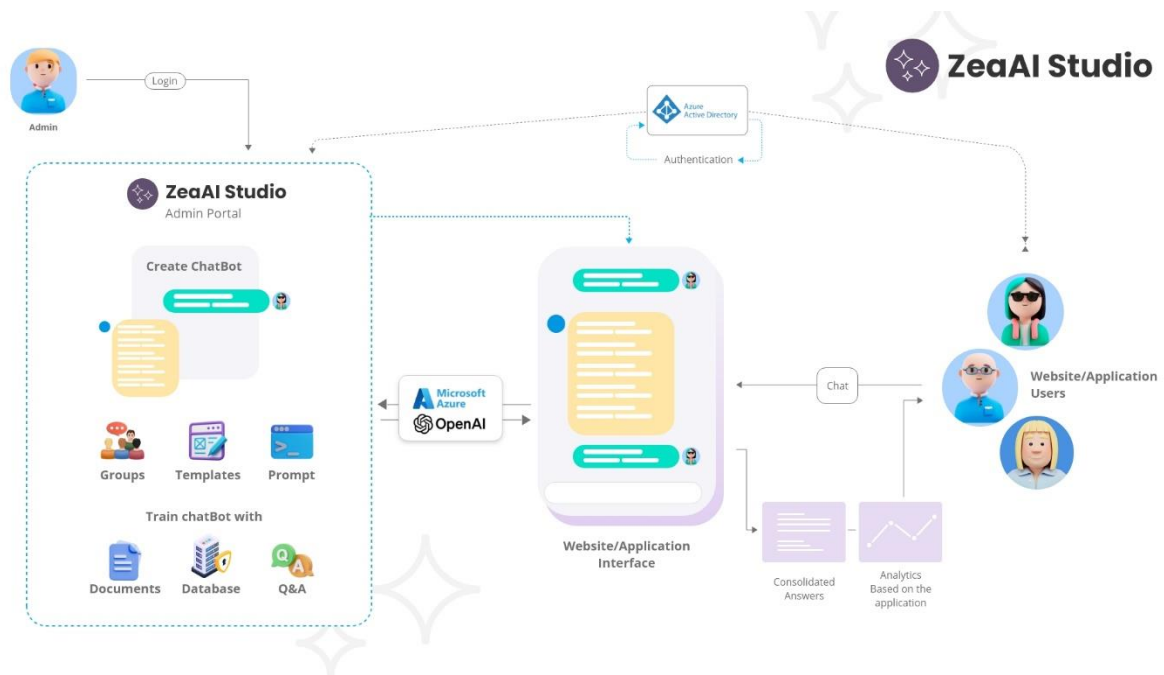
Fig: High-Level Architecture Diagram

DEPLOYMENT

Hosting
The application is hosted on the Azure cloud platform to guarantee scalability and accessibility.

FEATURES

Each feature of ZeaAI Studio encapsulates a unique aspect of its functionality, contributing to an integrated and comprehensive user experience. Explore below to discover how each feature enhances interaction and management within the application.

Signup/Login

ZeaAI Studio offers two options for authentication: Local authentication and Azure AD Authentication.

1. Local Authentication: Users can create an account directly within the application using their email address and password, providing a straightforward and familiar signup process. Upon subsequent visits, they can log in securely using their credentials.

2. Azure AD Authentication: For organizations utilizing Azure Active Directory (AD), ZeaAI Studio supports seamless integration with Azure AD Authentication. Users can sign in using their existing Azure AD credentials, ensuring a streamlined login experience and centralized user management for administrators.
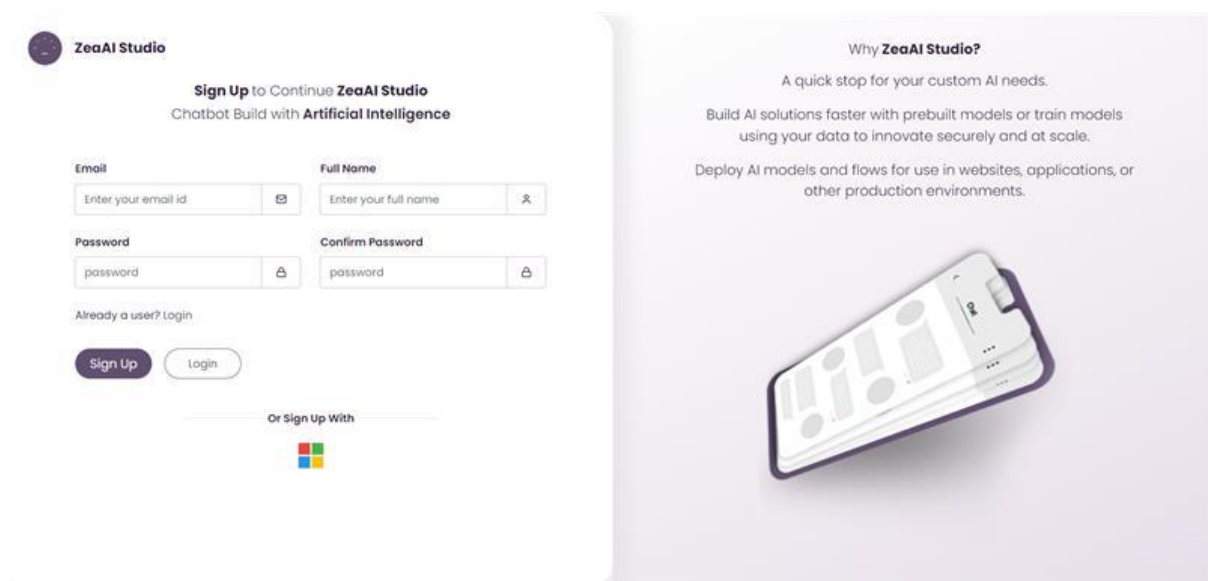
Fig: Sign Up
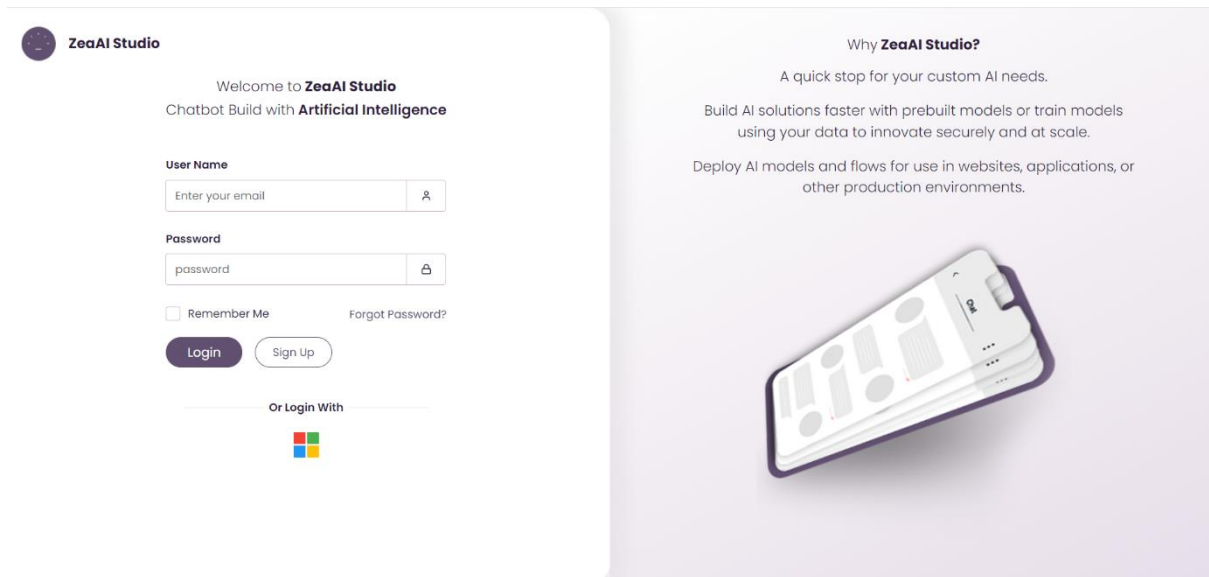
Fig: Login

Additionally, ZeaAI Studio sends three types of welcome emails to users:

1. **Approval Pending Notification**: Users receive this email upon successfully creating an account. It notifies them that their account creation was successful and requests them to await admin approval before logging in.
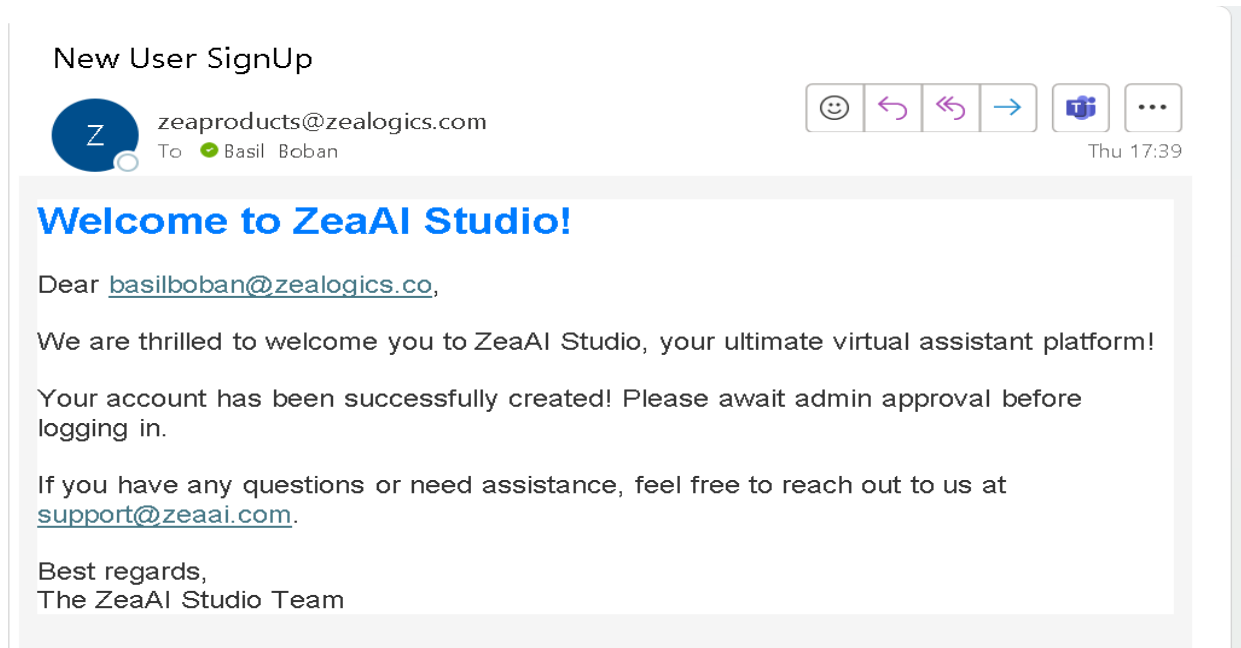
Fig: Approval Pending Notification

2. **Approval Confirmation Notification:** Users receive this email upon admin approval of their account signup request. It informs them that their signup request has been approved and provides instructions to log in to the platform.

New User SignUp
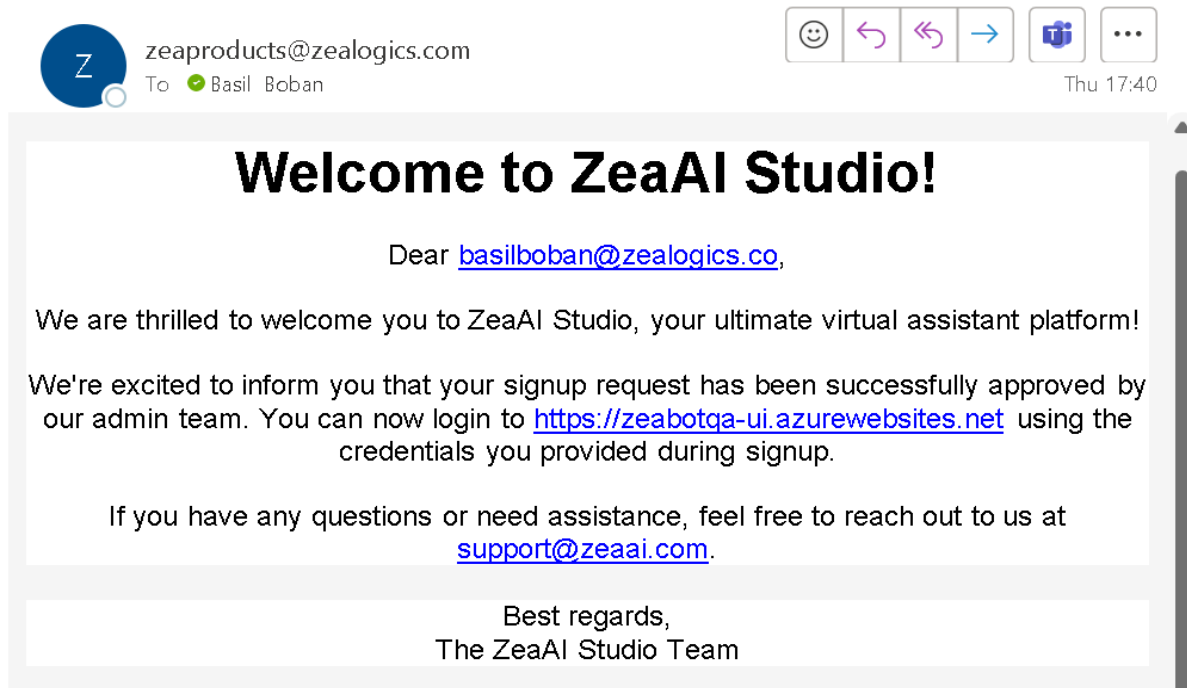
Fig: Approval Confirmation Notification

3. **Rejection Notification:** Users receive this email if their account signup request has been rejected by the admin team. It informs them of the rejection and may provide reasons for the rejection.
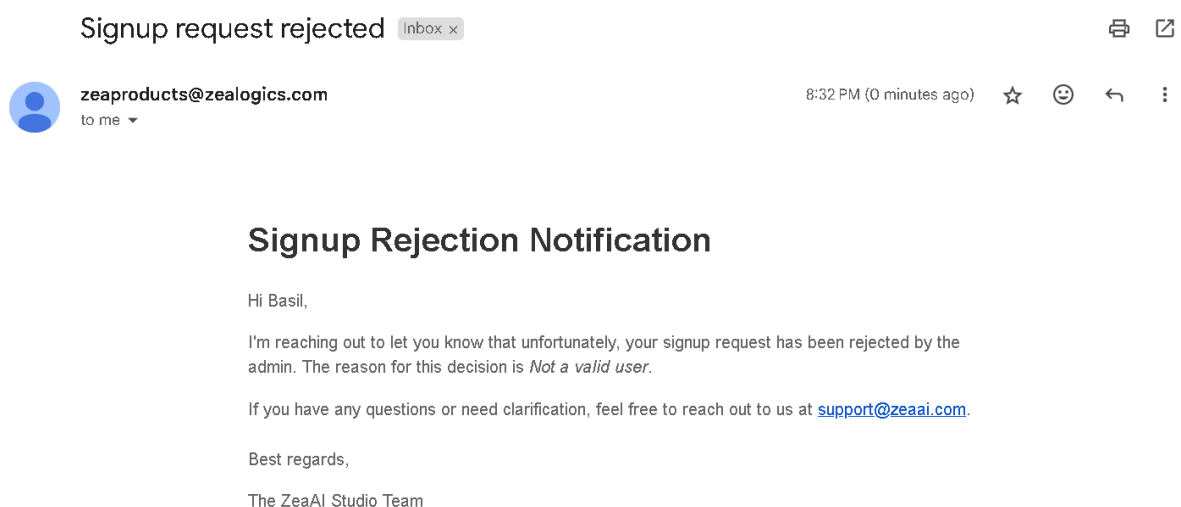
Fig: Rejection Notification

4. Additionally, ZeaAI Studio sends a notification email to the admin when a user's signup request is pending approval. This email informs the admin that a user has signed up and is awaiting approval, prompting them to take action on the pending request.

New User Signup Approval Required

Dear Admin,

A new user has signed up for ZeaAI Studio and is awaiting your approval to access the platform.

User Details:
Name: Basil
Email: basilkboban@gmail.com

Please login to https://zeabotqa-ui.azurewebsites.net

to access the User Management Section and review and approve this signup request.

Thank you for your attention to this matter.

Best regards,
The ZeaAI Studio Team

Fig: Signup Notification for Admin

Password Reset Process

The password reset feature in ZeaAI Studio ensures a seamless and secure experience for users who may have forgotten their login credentials. By following a straightforward process, users can easily regain access to their accounts in just a few simple steps. This feature provides peace of mind and convenience, allowing users to reset their passwords with ease and minimal hassle.

1. Click on "Forgot Password?" on the login screen and Enter your email address
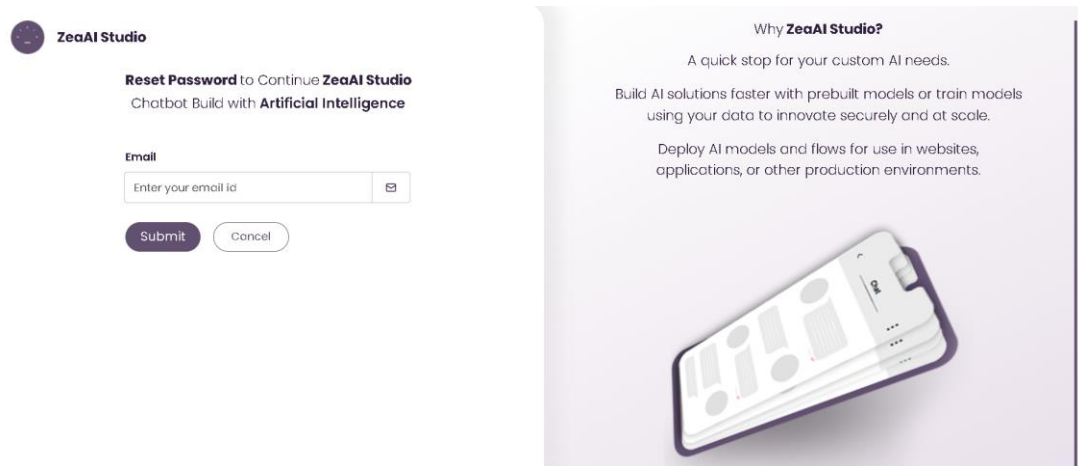
Fig: Enter Email Address

2. A password reset email will be sent to your inbox and Click on the "Reset Password" link in the email.
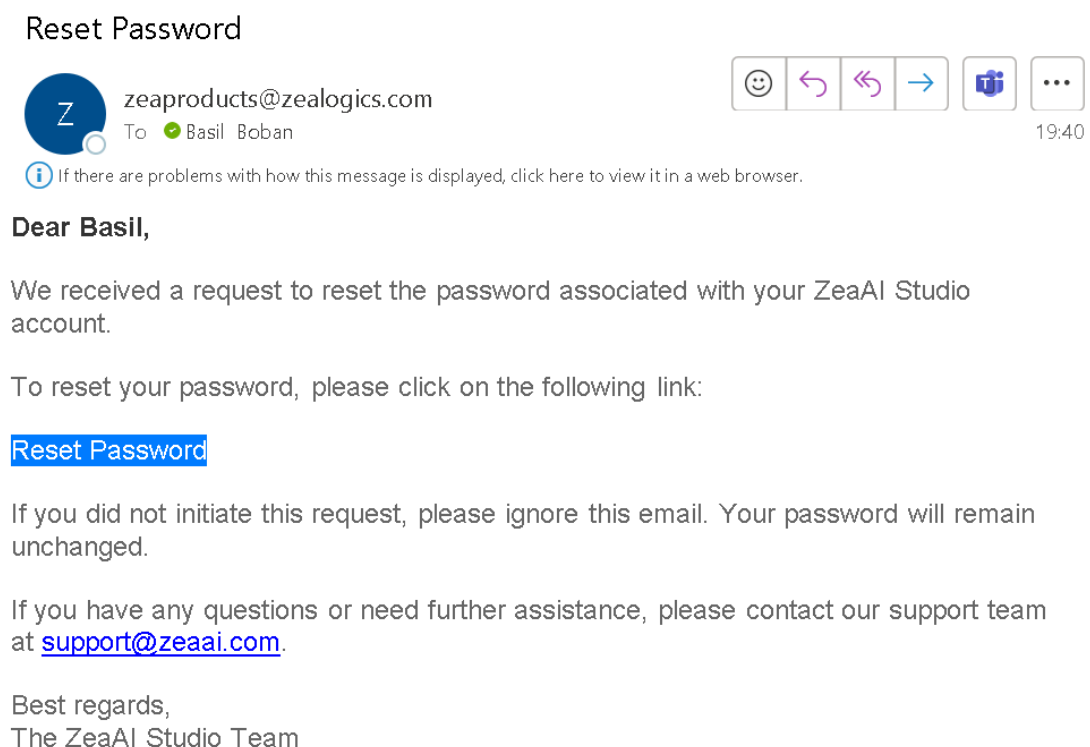
Fig: Reset Password Email

3. You will be redirected to a page where you can enter and confirm your new password. Click Save
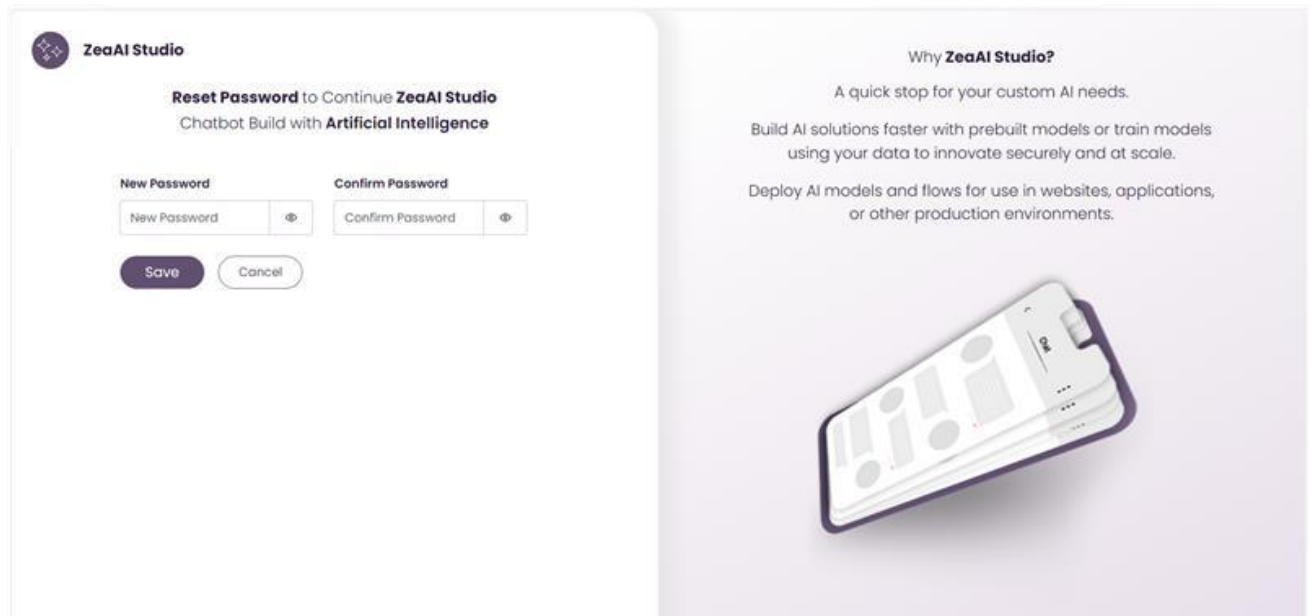
Fig: New Password Entry

Role Management

In ZeaAI Studio, administrators have the flexibility to create custom roles tailored to the specific needs of their organization while leveraging predefined permissions.

1. Custom Role Creation: Administrators can create unique roles that align with the organizational structure and requirements. This allows for the establishment of role hierarchies and the allocation of responsibilities according to organizational roles and responsibilities.

2. Predefined Permissions: ZeaAI Studio offers a set of predefined permissions that administrators can assign to custom roles. These permissions are carefully curated to ensure security and compliance with organizational policies and regulatory requirements.
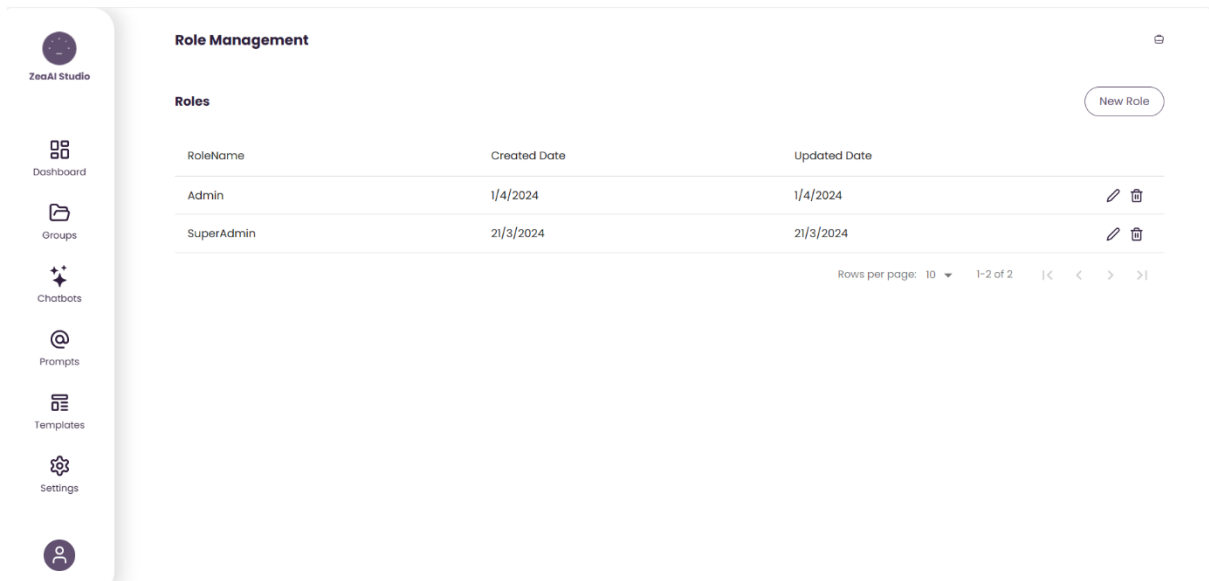
Fig: Role Management
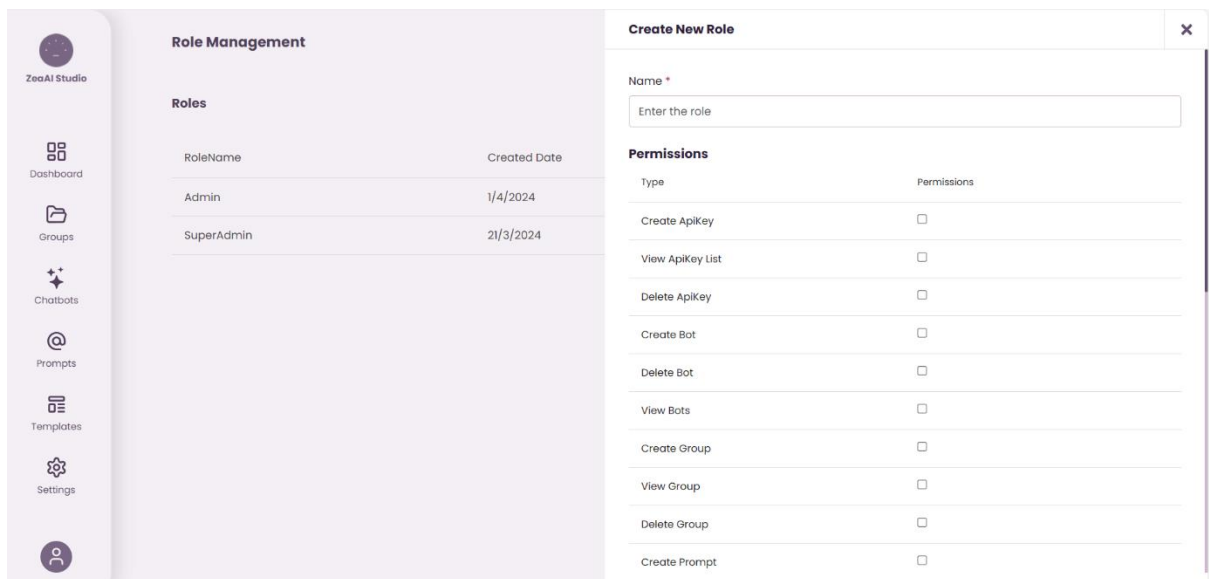
Fig: Role Creation

User Management

ZeaAI Studio Simplifies user management through intuitive interfaces, providing administrators with control over user roles, activations, and deactivations.

1. New Users Screen: Upon signup, newly registered users are presented in the New Users screen, awaiting approval from the administrator. Admins can assign roles and approve signups, ensuring that new users are appropriately onboarded and granted access to ZeaAI Studio's features.
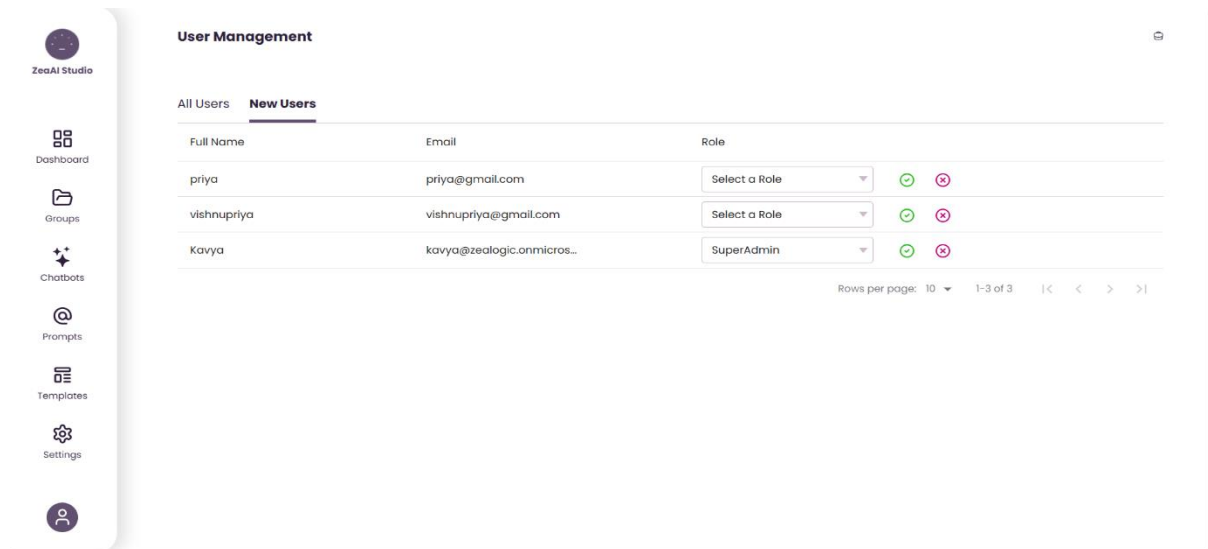
Fig: New Users

2. All Users Screen: The All-Users screen displays existing users along with their email addresses and assigned roles. Admins can easily identify and manage user accounts, including deactivating or reactivating users as necessary.

Fig: All Users

13
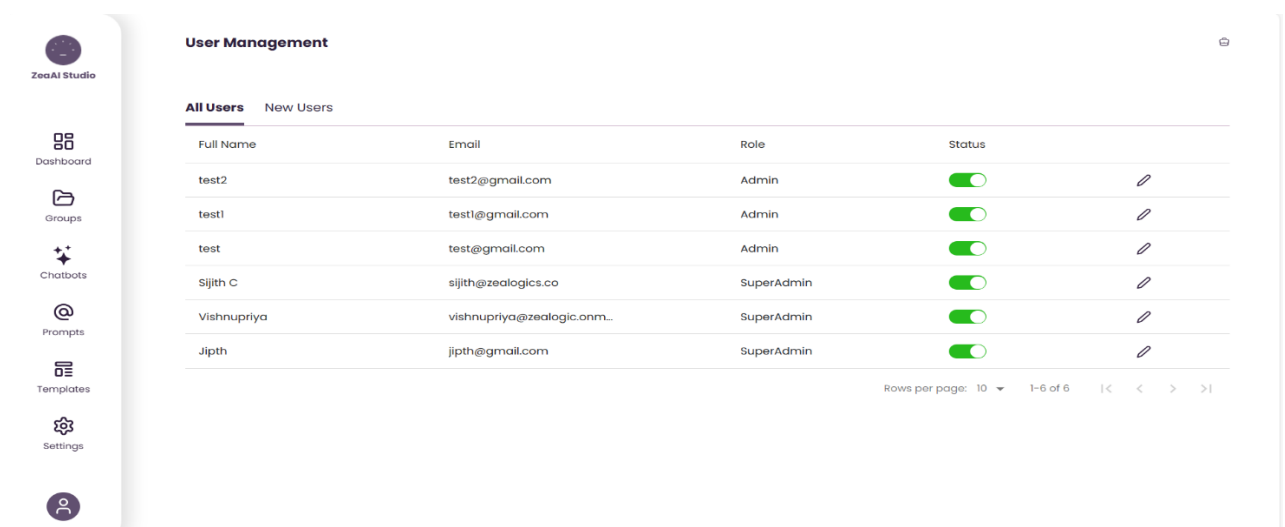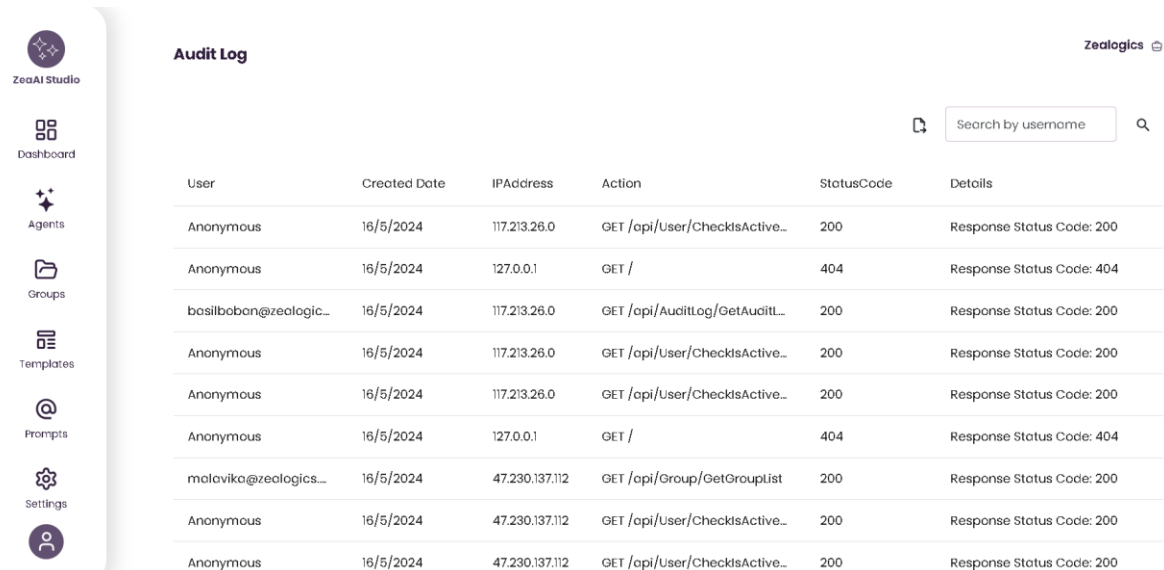
Audit Logs

The Audit Log feature in ZeaAI Studio tracks and records user activities and system events, ensuring transparency and security. It records details such as the username, date and time of the action, IP address, specific action taken, response status code, and additional outcome details. Administrators can search logs by username and filter by date range, making it easy to track specific activities. The feature also allows exporting logs to an XLS file for offline analysis.

Fig: Audit Logs

Groups

ZeaAI Studio offers flexible group management capabilities, allowing administrators to create and organize groups based on organizational preferences.

1. Group Creation: Admins can create groups within ZeaAI Studio based on organizational divisions, departments, or project teams. Common groups may include HR, Accounts, Sales, etc. Group creation is straightforward, enabling admins to define group names and characteristics to suit organizational needs.

2. Group Assignment: Once created, the chatbot created within ZeaAI Studio can be assigned to specific groups based on their characteristics or functionalities. This allows for targeted communication and interaction with users within each group, ensuring relevance and efficiency in responses.
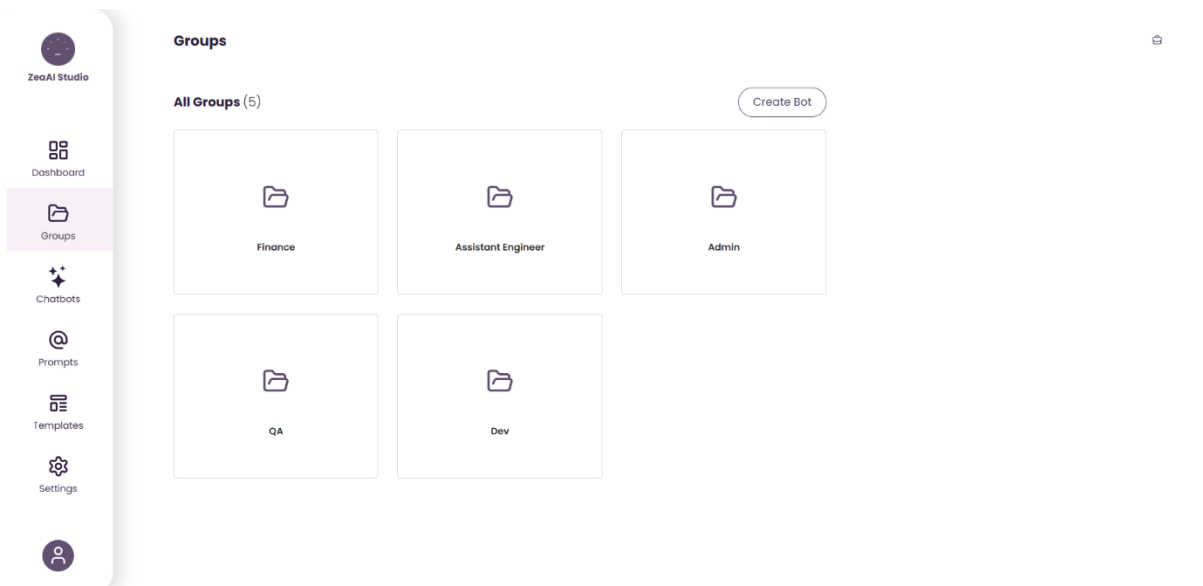
Fig: Groups
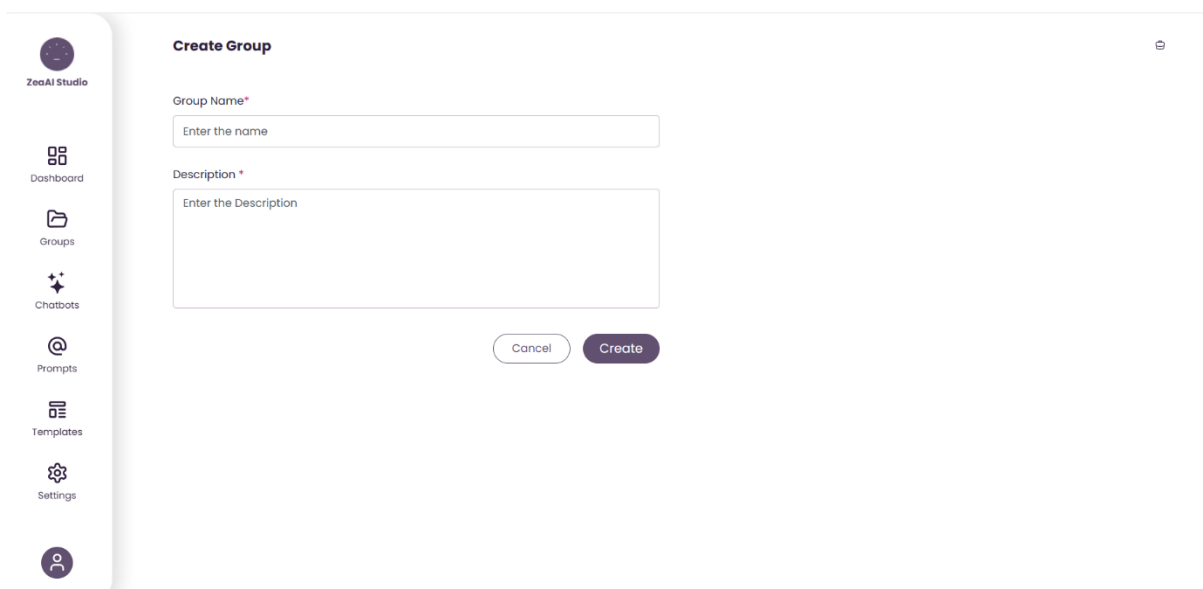
Fig: Create Groups

Prompt

ZeaAI Studio simplifies prompt creation and management, empowering administrators to craft customized prompts for enhanced user interactions.

1. Prompt Creation: Admins can easily create prompts within ZeaAI Studio by providing a prompt name, description, and instructions. This interface allows admins to tailor

15

prompts to specific use cases or scenarios, ensuring clarity and relevance in user interactions.

Fig: Create Prompt

Fig: Prompt View Page

Template

ZeaAI Studio offers a comprehensive template management system, facilitating efficient organization and utilization of templates for various purposes.

1. Template Page: The Template page provides a centralized view of all templates, organized according to grouping conventions. Users can easily navigate through templates and locate specific ones based on their grouping.
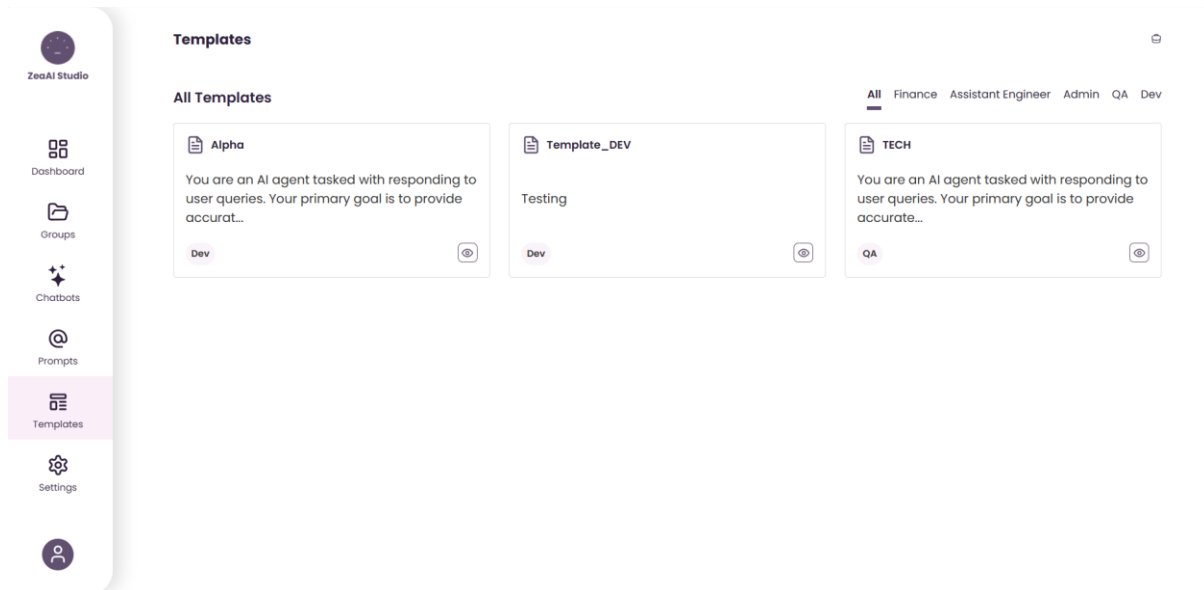
Fig: Template Page

2. Template Details View: Clicking on the view button of any template enables users to access detailed information, including files from the website, Q&A, database, and related prompts. This detailed view allows users to review all components associated with a specific template, aiding in template selection and utilization.
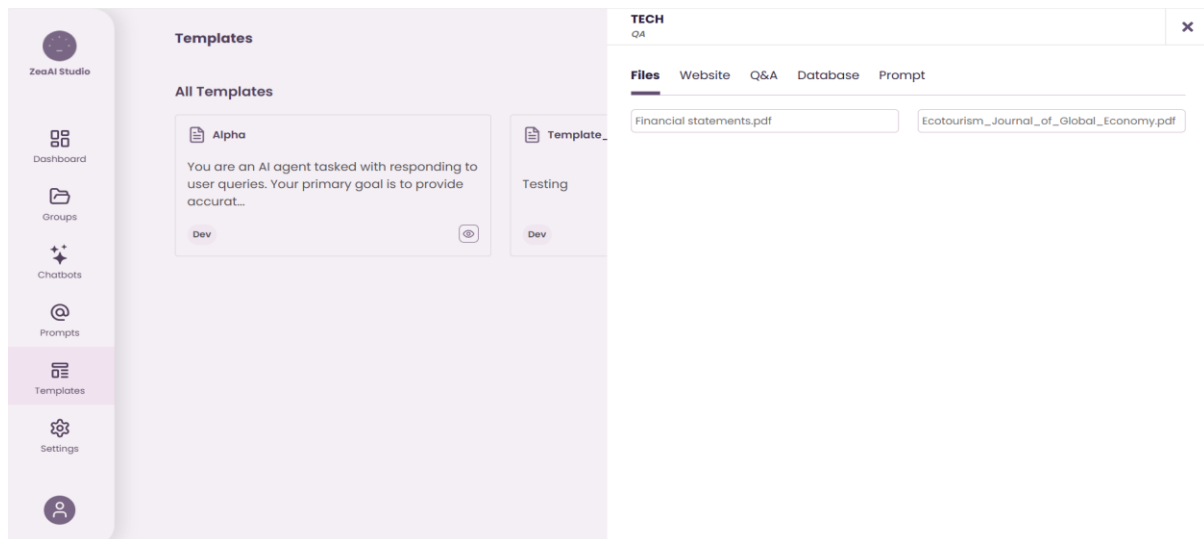
Fig: Template View Page

3. Template Creation: When creating a new template, users are required to provide three sections of information:

a) Basic Details: Users input the template name, specify the group to which it should be mapped, and provide instructions for utilizing the template.

Fig: Basic Details

b) Sources: Users can add files, websites, Q&A, and databases related to the specific template, ensuring all necessary resources are easily accessible.

Fig: Sources

c) Prompt: Users select prompts from the existing list, checking those that are relevant to the specific template's requirements.
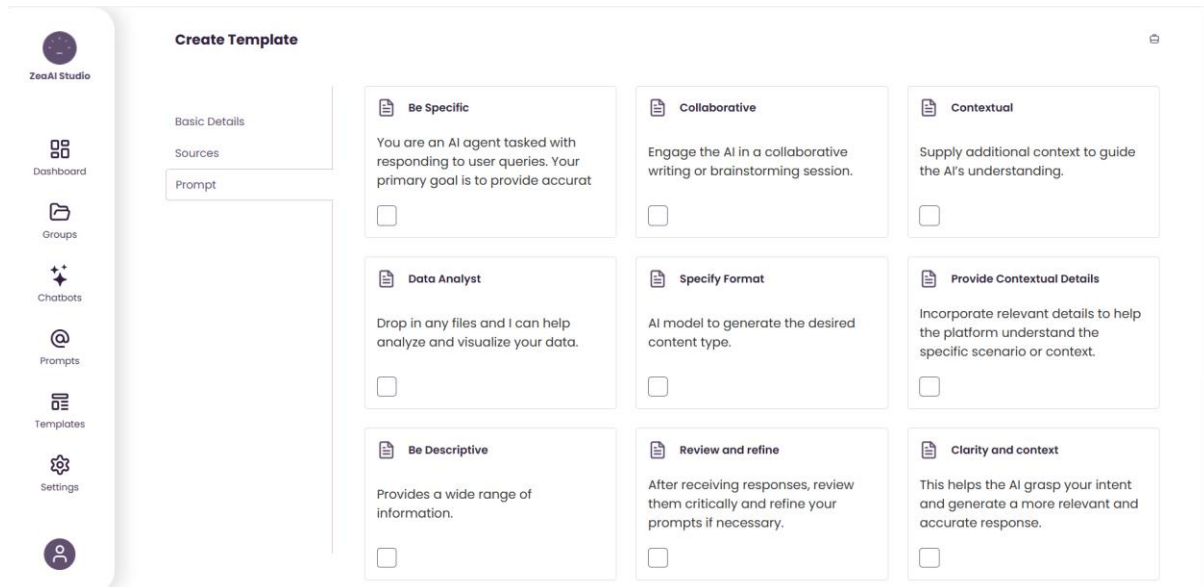

Fig: Prompt Selection

Dashboard

ZeaAI Studio's dashboard provides a comprehensive overview of key metrics and insights, enabling administrators to monitor and manage organizational activities effectively.

1. User Overview: The dashboard presents an overview of user statuses, including active, inactive, rejected, and new users. This allows administrators to track user engagement and identify any issues that may require attention.

2. Group, Chatbot, Template, and User Counts: Administrators can quickly view counts for groups, chatbots, templates, and users directly from the dashboard.

3. Usage Overview Graph: A graph displaying usage overview for each month offers visual representation of trends and patterns in user activity over time.

4. Detailed Organization View: The dashboard also offers a detailed view of organizational details, including created on date, point of contact (POC), package information, email addresses, expiry dates, phone numbers, and recent activities.
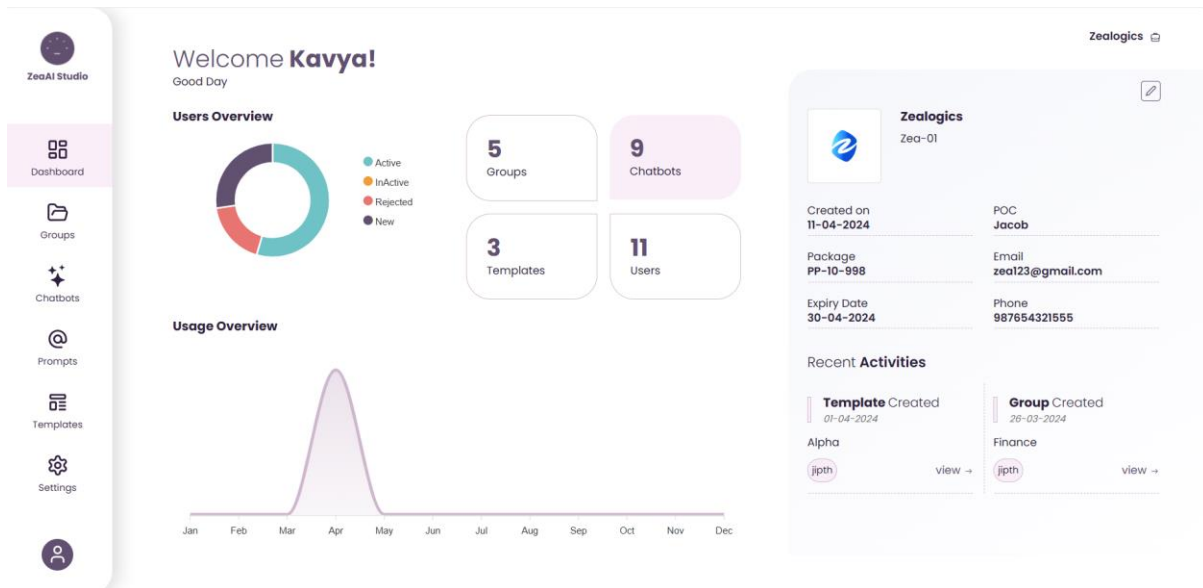
Fig: Dashboard

Chatbot Creation

Creating a chatbot in ZeaAI Studio is a straightforward process, consisting of several steps:

1. Access Chatbots Menu: Navigate to the Chatbots menu on the left panel of ZeaAI Studio Clicking on it will redirect the user to the chatbot listing page.
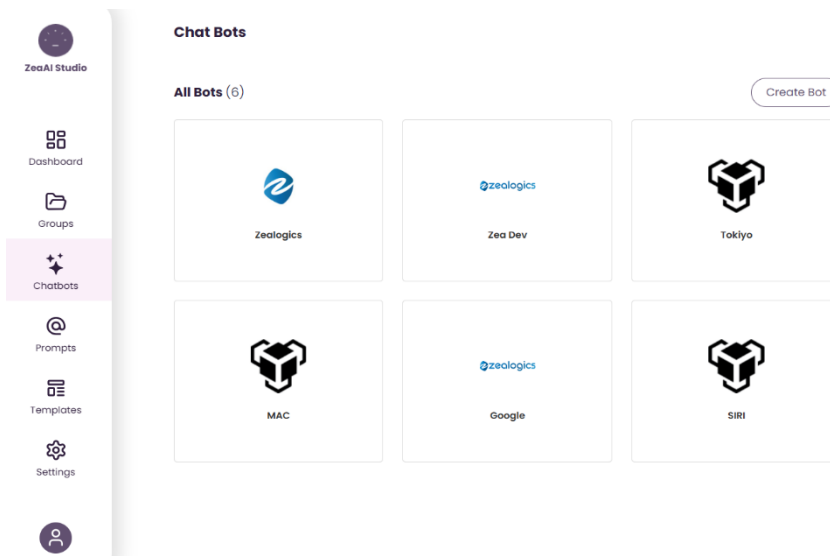

Fig: Chat bots listing

2. Initiate Chatbot Creation: On the chatbot listing page, click on the "Create Bot" button to begin the chatbot creation process.

3. Select Template: Users are redirected to the template page, where they can select one or multiple templates to define the behavior of the chatbot. Alternatively, they can choose to skip this step.
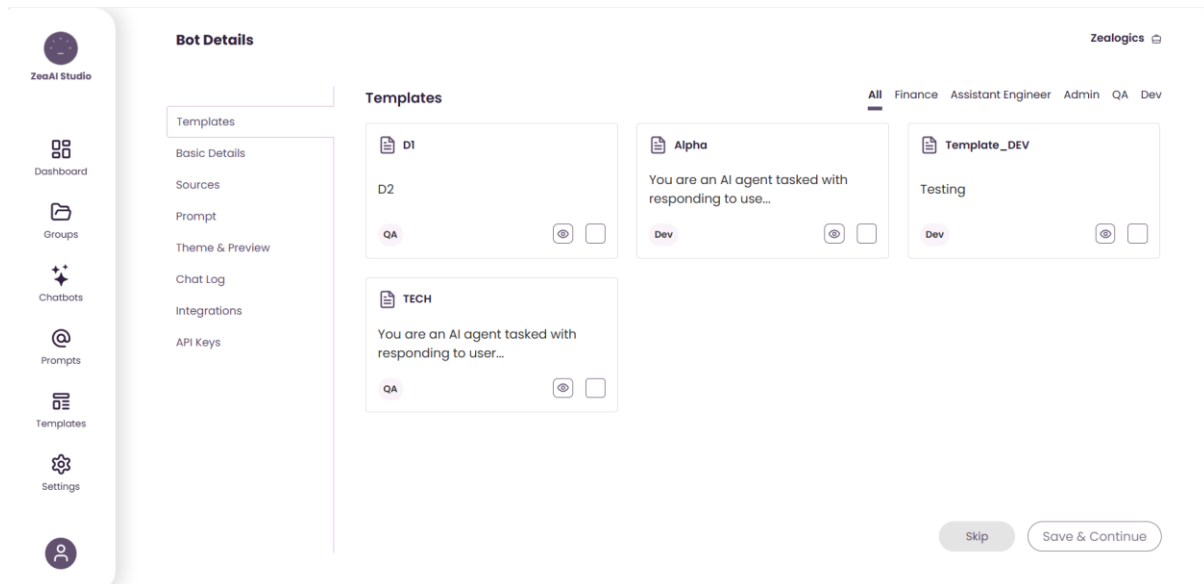
Fig: Templates Page

4. Provide Basic Details: After selecting templates, users proceed to the basic details page Here, they input the Assistant name, Nickname, select a group for the assistant, provide a description, instructions, choose a GPT model, and input the GPTAPI key Click on "Save & Continue" to proceed.
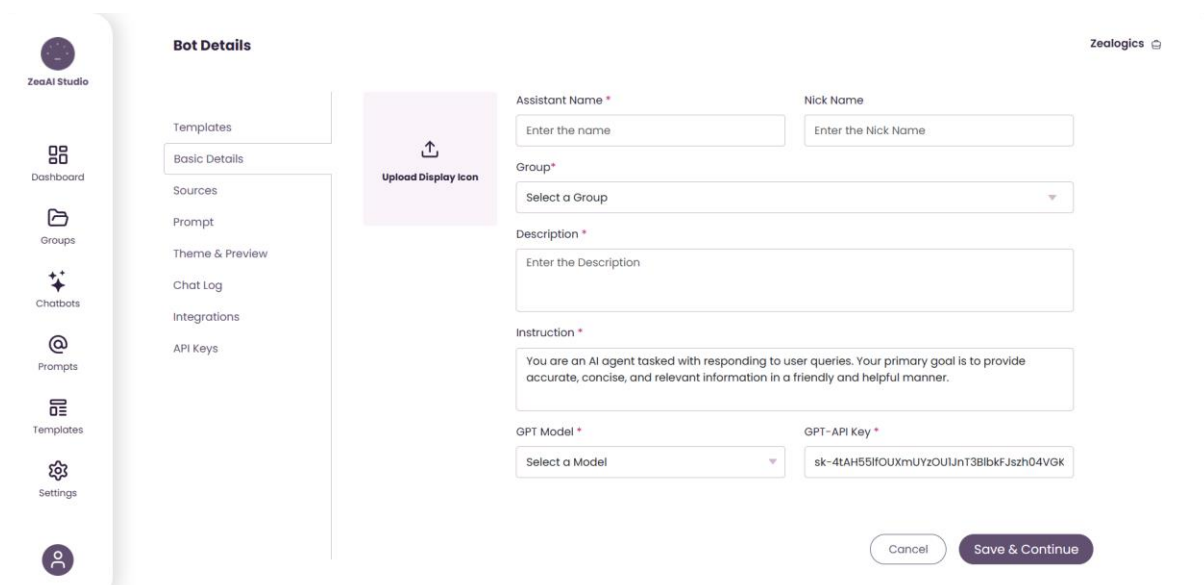
Fig: Basic Details

5. Add Sources: In the sources page, users can add or modify files, Q&A, and databases related to the chatbot Once done, they click on "Save & Continue"
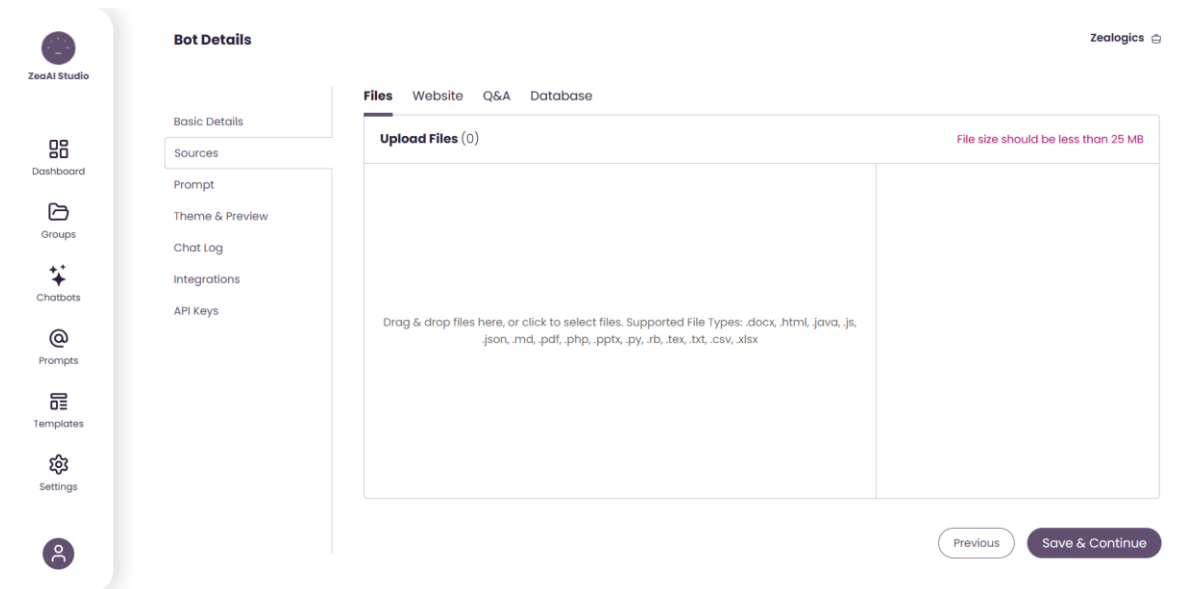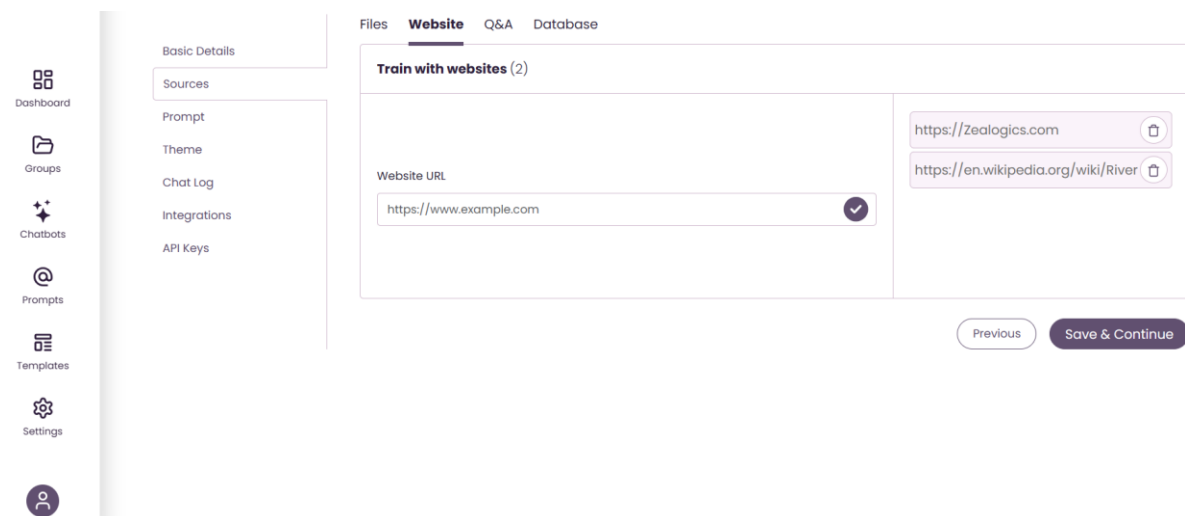

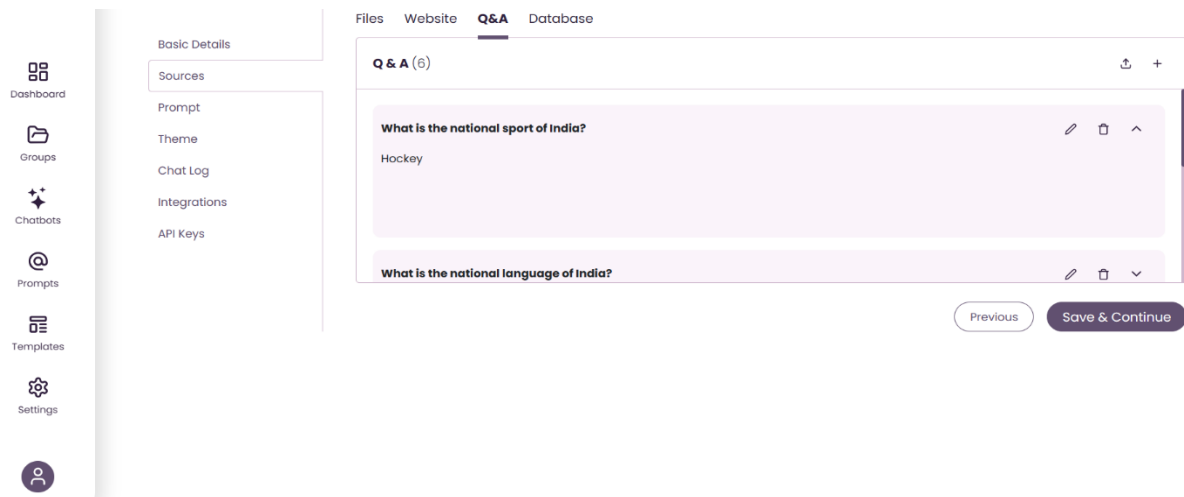Fig: Sources – Files
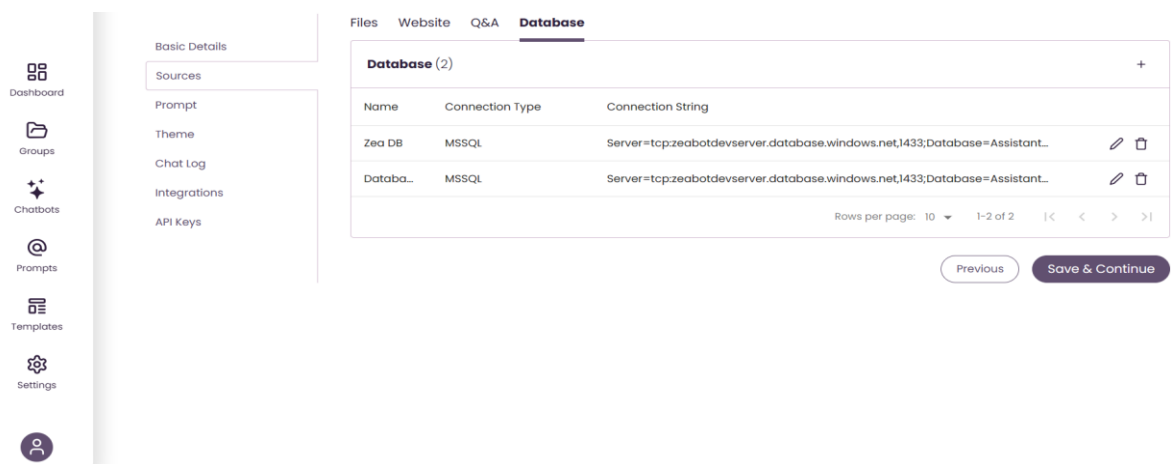

Fig: Sources – Website
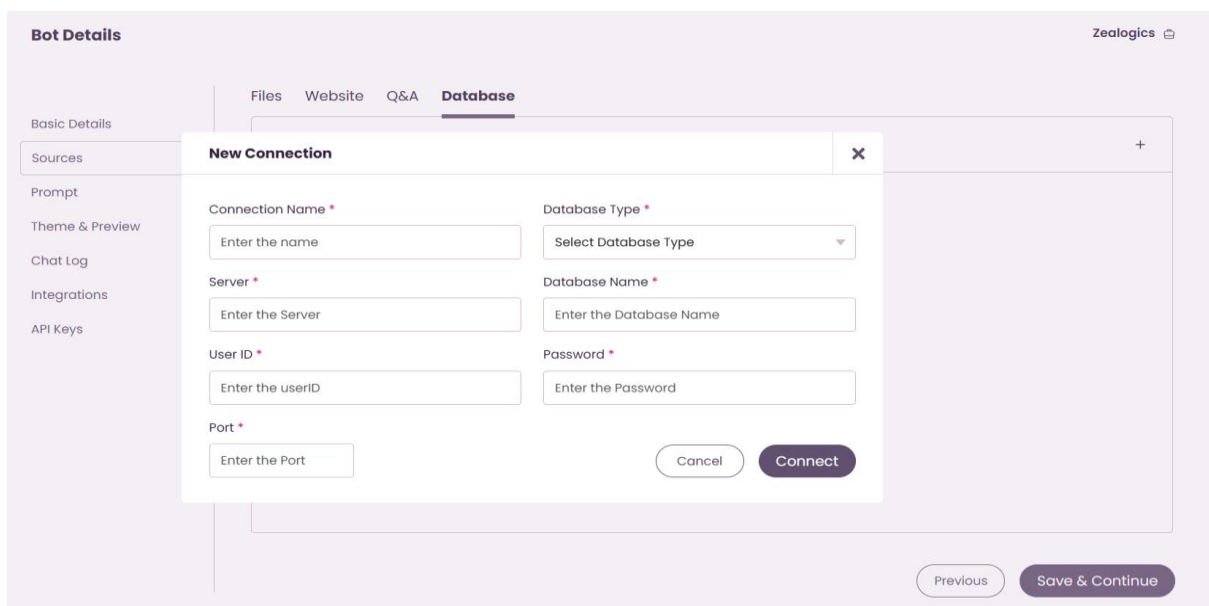
Fig: Sources – Q&A

Fig: Sources – Database

Fig: Sources – Database New Connection

6. Select Prompts: Users select prompts required for the assistant in this step. Additionally, users have the option to save this newly created bot as a template by selecting the checkbox labeled "Save as Template."
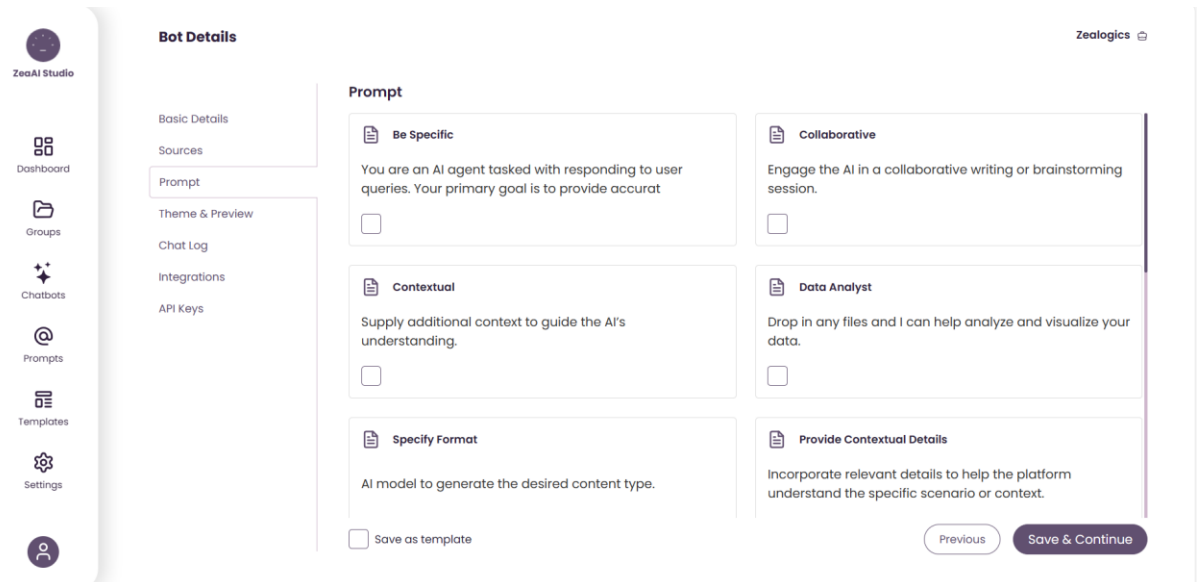

Fig: Prompt Selection

7. Theme & Preview: Customize the appearance of the chatbot by adjusting colors and previewing the changes Click on "Save" once satisfied.
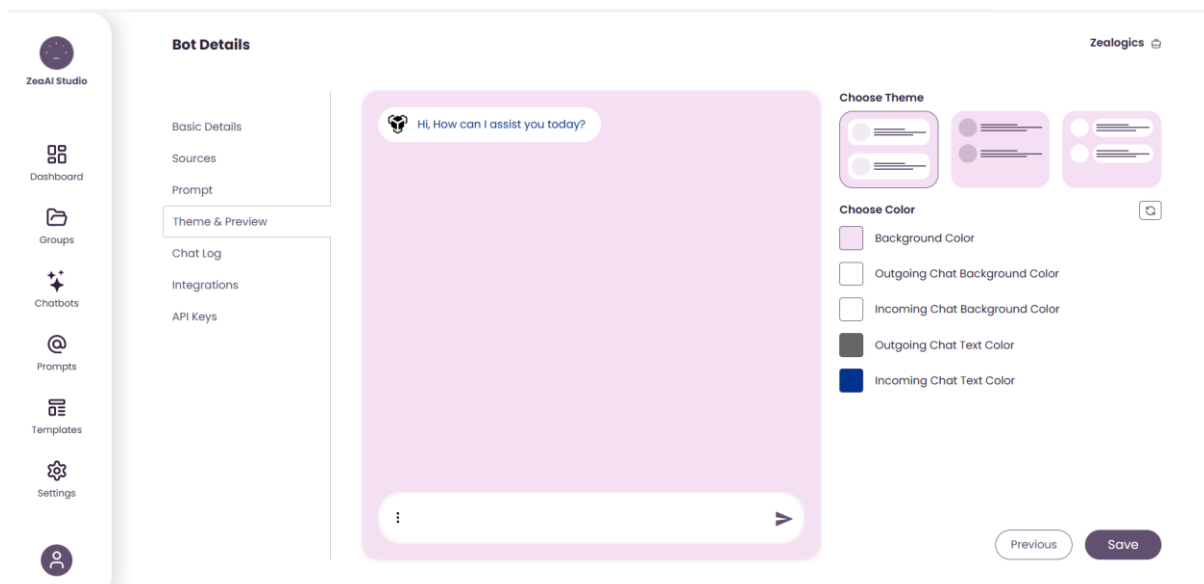

Fig: Theme & Preview

8. Chatlog: Users can view the chatlog of the assistant/chatbot, displaying interactions with date and time.
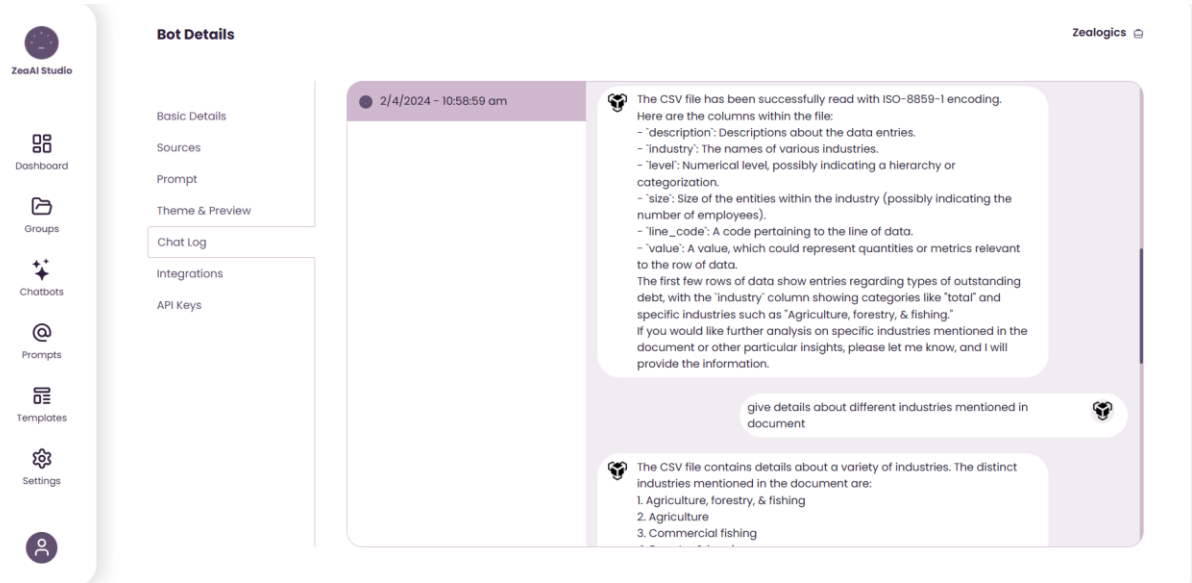

Fig: Chat Log

9. Generate API Key: In the API key submenu, users can generate an API key. They can also copy the Iframe code snippet to embed the created chatbot/assistant into a website.
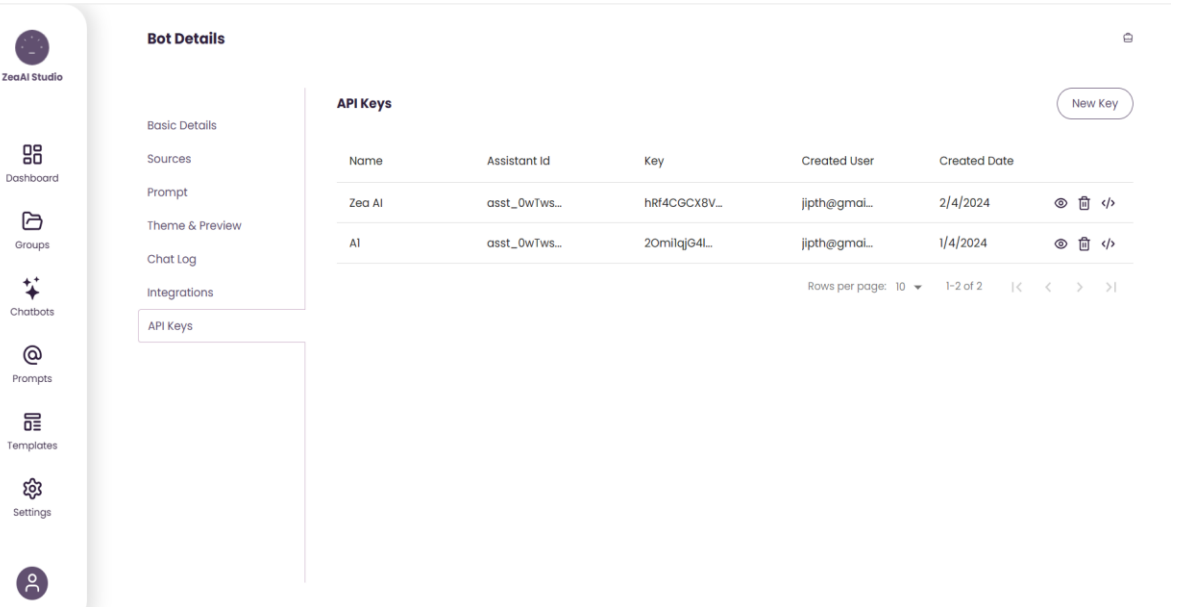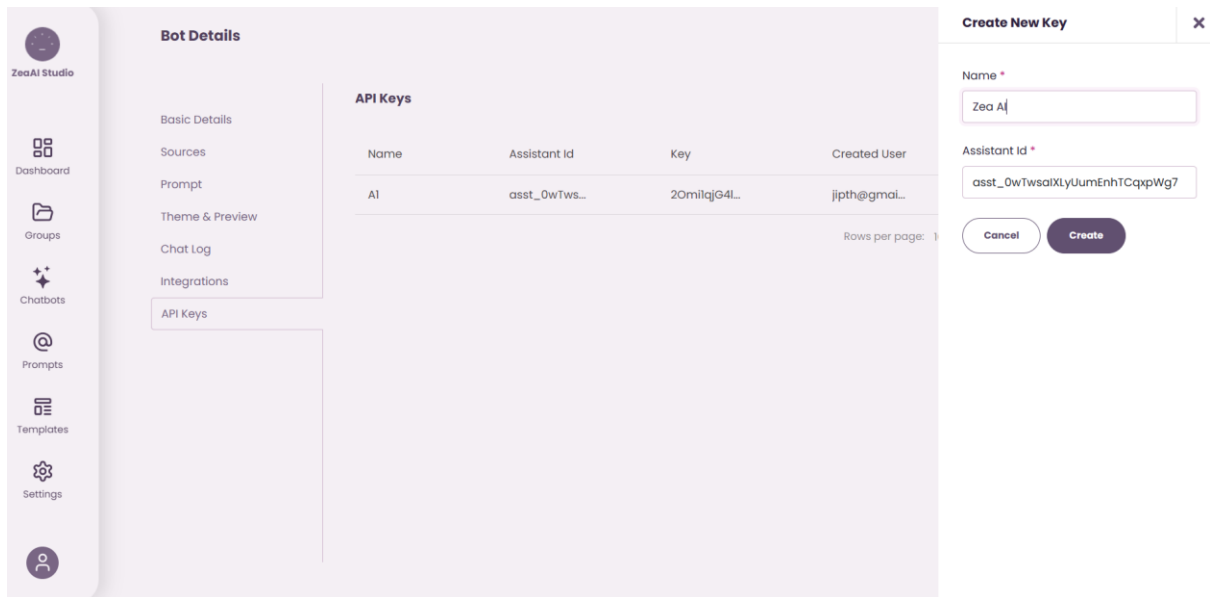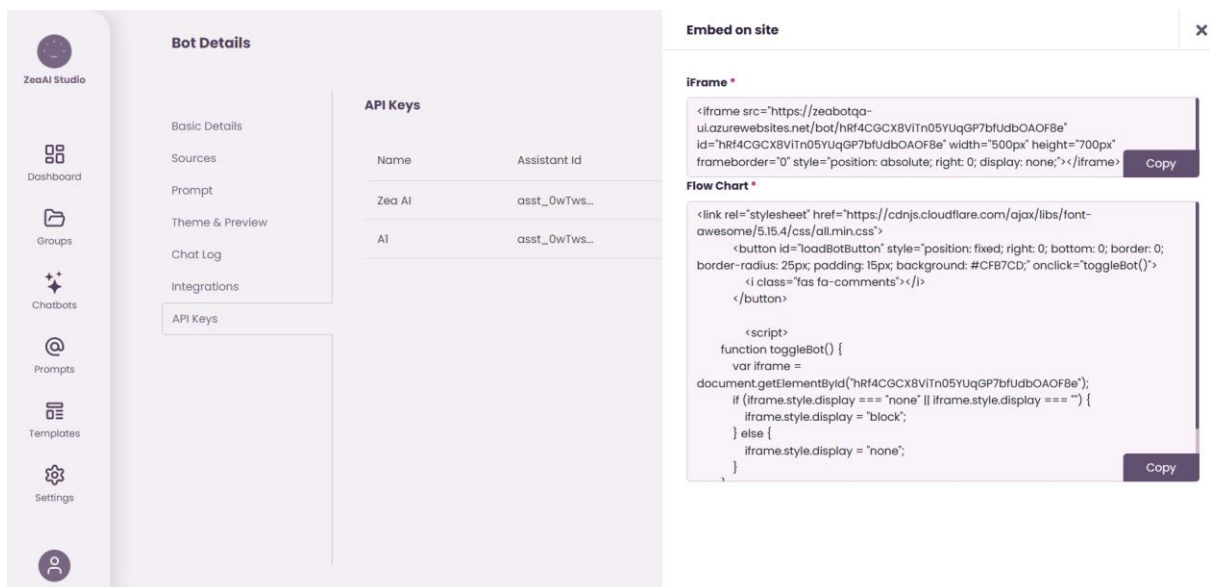

Fig: API Key

Fig: Create New API key

Fig: API Key – Embed on site

By following these step-by-step instructions, users can effortlessly create and customize chatbots to meet their specific requirements within ZeaAI Studio