Slack Implementation Guide

Ascendo Confidential and Proprietary Information

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1 Overview

Ascendo also provides predictive services through its slack app.These services can be used with the help of simple slash commands, and message shortcuts on slack.

2 Purpose

This document gives the detailed description on how to install the ascendo slack app and use its functionalities.

Below table provides information about how the rest of the document is organized:

Section	Purpose	When to Use?
Section 3 - Prerequisites	Provides the requirements to use Ascendo in Slack	For any user wanting to use Ascendo app in Slack
Section 4 - Signing up for Ascendo	Only users that are licensed for Ascendo can use the Ascendo App in Slack. This section shows how to sign up for Ascendo	To Sign up for Ascendo in order to use in Slack
Section 5 - Adding Business Unis and Product Groups	When Ascendo is used in Slack, users get prediction results for the supported product. These need to be configured first in Ascendo	Configure the business units and product groups in Ascendo so they can be connected in Slack to get prediction results
Section 6 - Configuring Slack Channel	Setup wizard that allows users to configure slack channel to Ascendo.	To set up Slack channel so Ascendo can be used from within Slack
Section 7 - Adding Ascendo to Slack	Provides steps to add Ascendo Appto slack workspace and channels	To add Ascendo app to Slack workspace
Section 8 - Adding Ascendo to Channels	Provides steps to add the App to slack channels and also authorize users to execute Ascendo commands and shortcuts	To execute Ascendo slack commands and shortcuts
Section 9 - Using the App in Slack	Specific commands and shortcuts available in Slack	To use Ascendo slack commands and message short cuts by users

3 Prerequisites

In order to use Ascendo in Slack, ensure the the following prerequisites are completed:

1. Signed up in Ascendo including the required license for Slack use
2. Business units and product groups must be set up. Ascendo provides prediction results only for the business unit and products that are set up in Ascendo.
3. Slack support channel set up. Slack support channel is used to connect business unit, associated product groups, data sources to a slack workspace
4. Users that are in Slack to use Ascendo must also be added in Ascendo App.

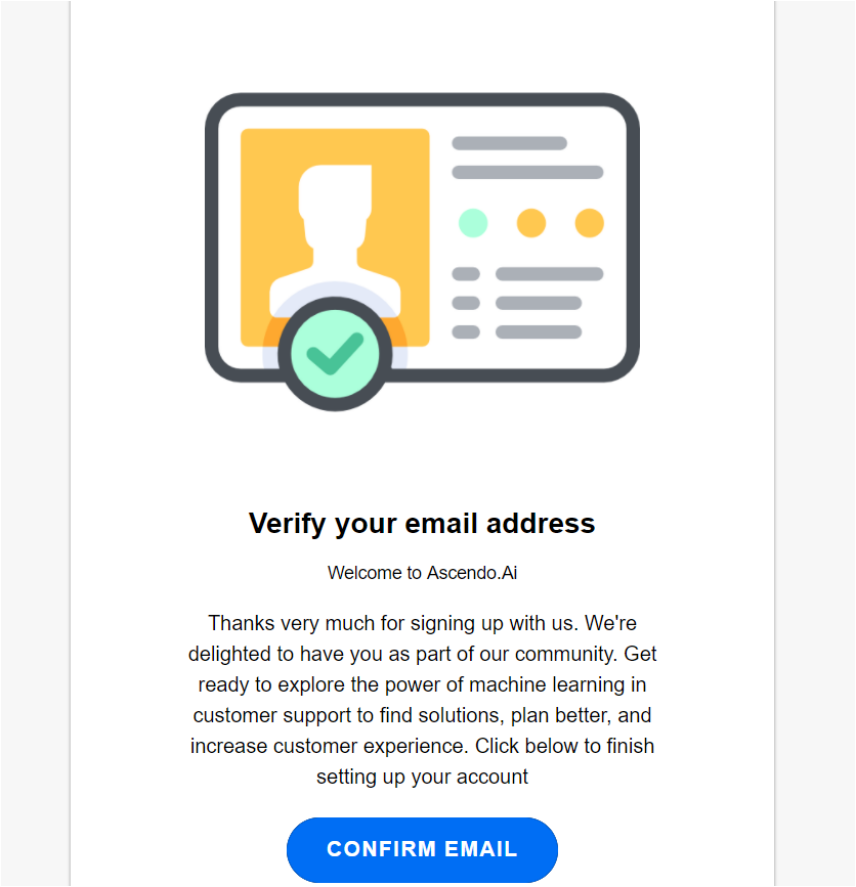
4 Signing up for Ascendo

In order to use the Ascendo app in Slack, users must be signed up for Ascendo. This section provides details on how to sign up for Ascendo.

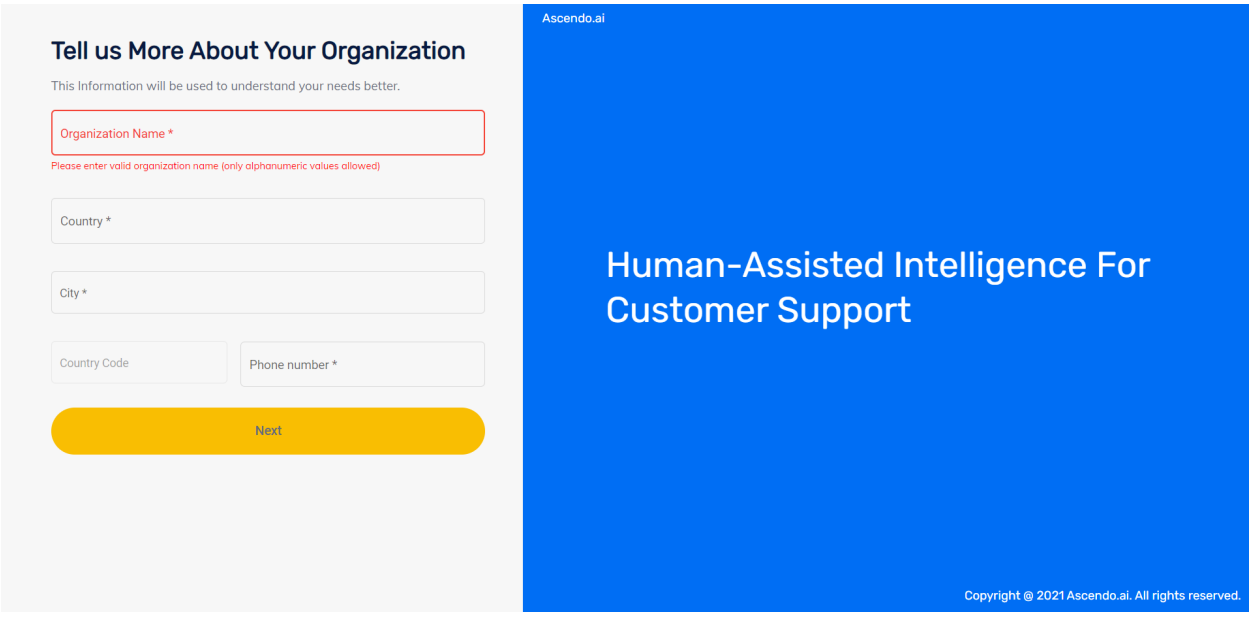
In order to install the app,go to https://app.ascendo.ai/signup and signup by providing all the necessary details.After signing up got to Ascendo's admin portal and under AI

1) Click on https://app.ascendo.ai/signup and fill all the details required for signup

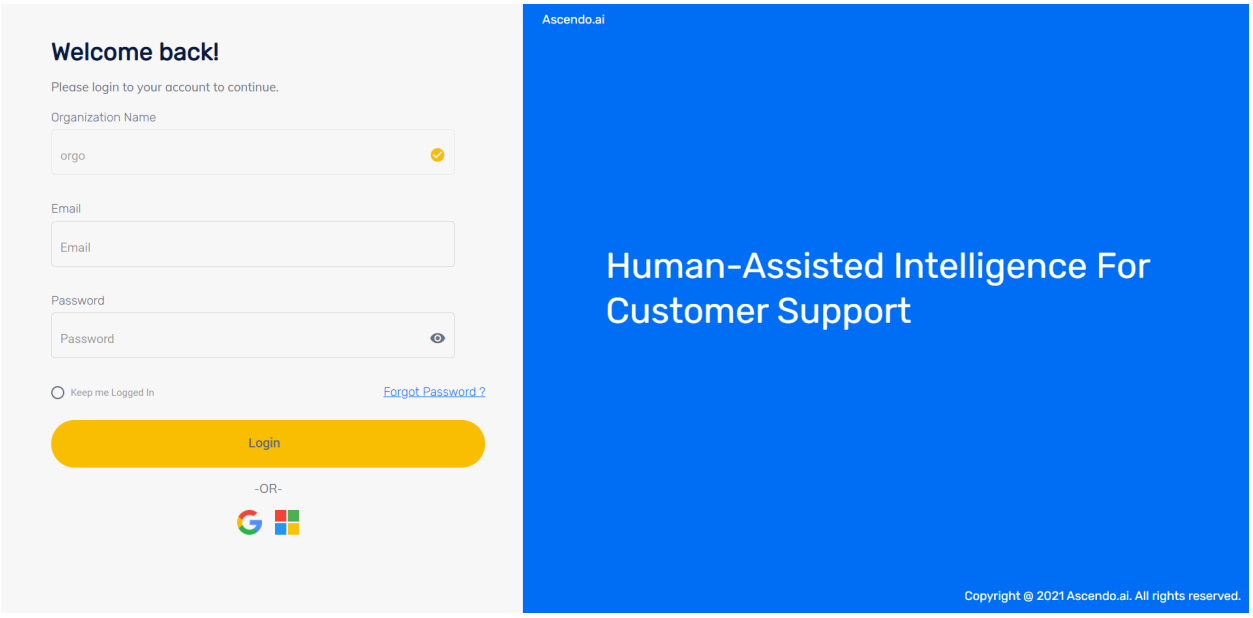
2) After providing all the details,a verification email will be sent.



3) After clicking on the "CONFIRM EMAIL" button, you will be redirected to a page to provide additional details about your organization.

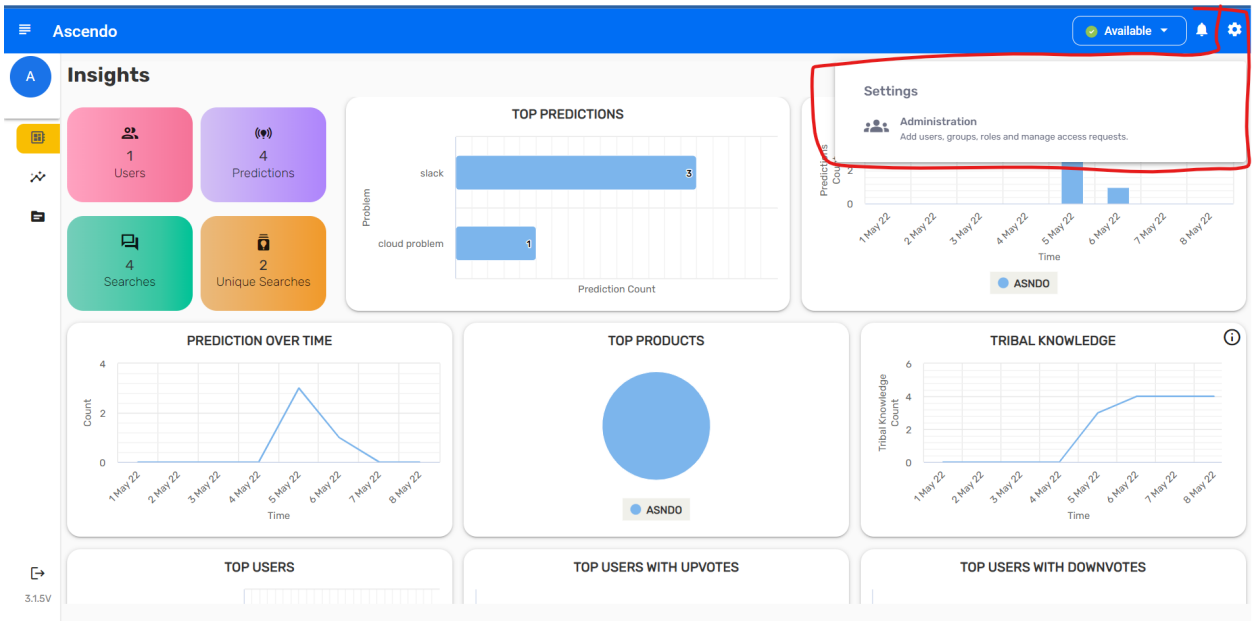


After providing you will be redirected to the login page where you can login using the credentials you just set.

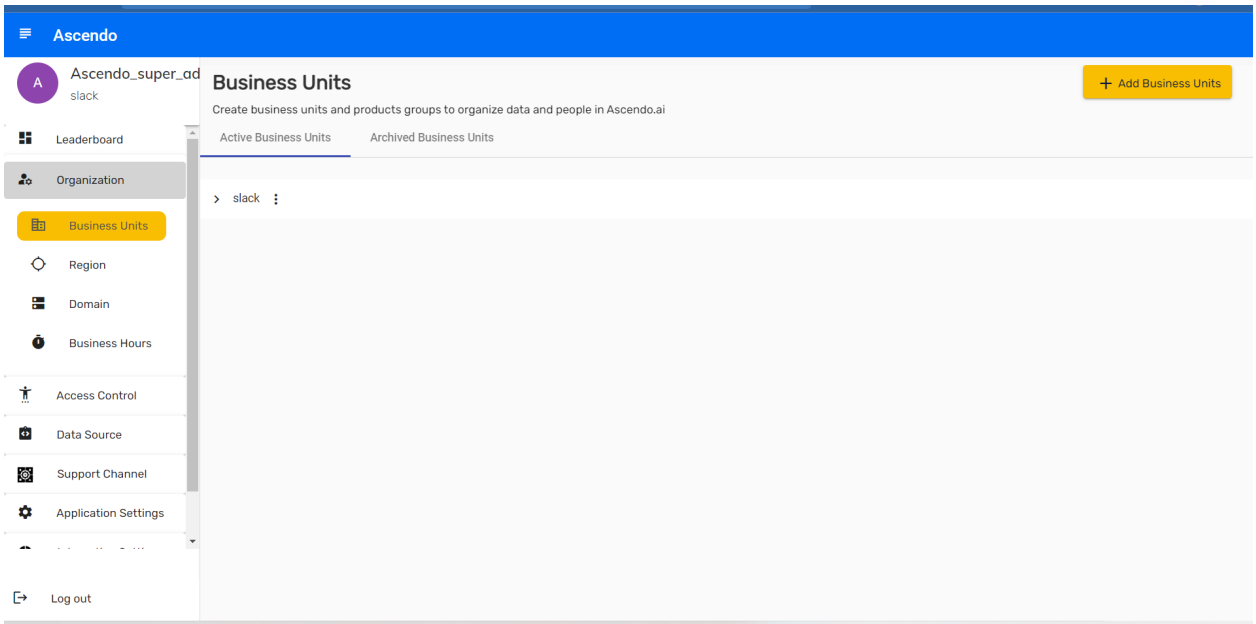


5 Adding Business Units and Product Groups

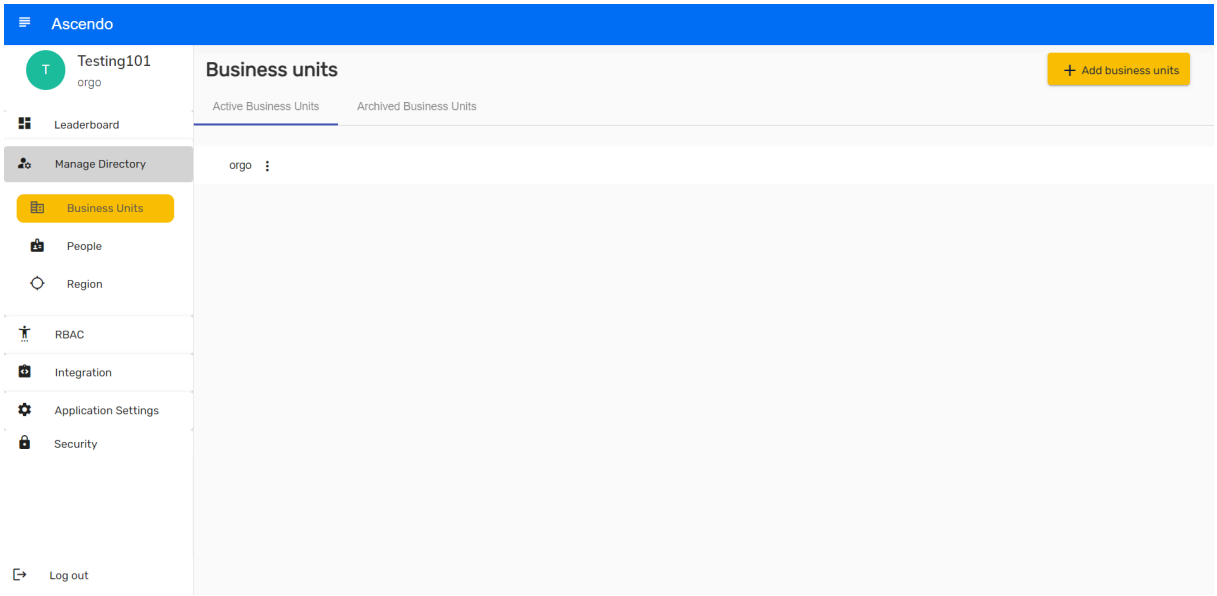
After logging in go to the admin portal by clicking on the settings icon on the top right corner and then clicking on “Administration”.



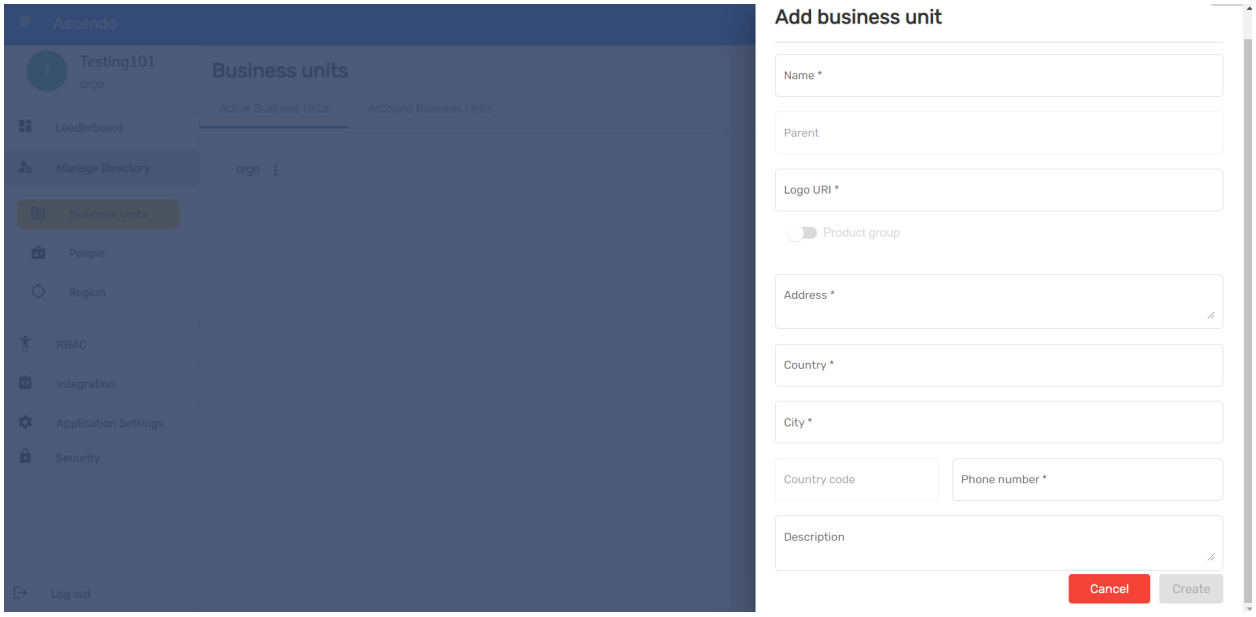
Go to **Organization>>Business Units.**



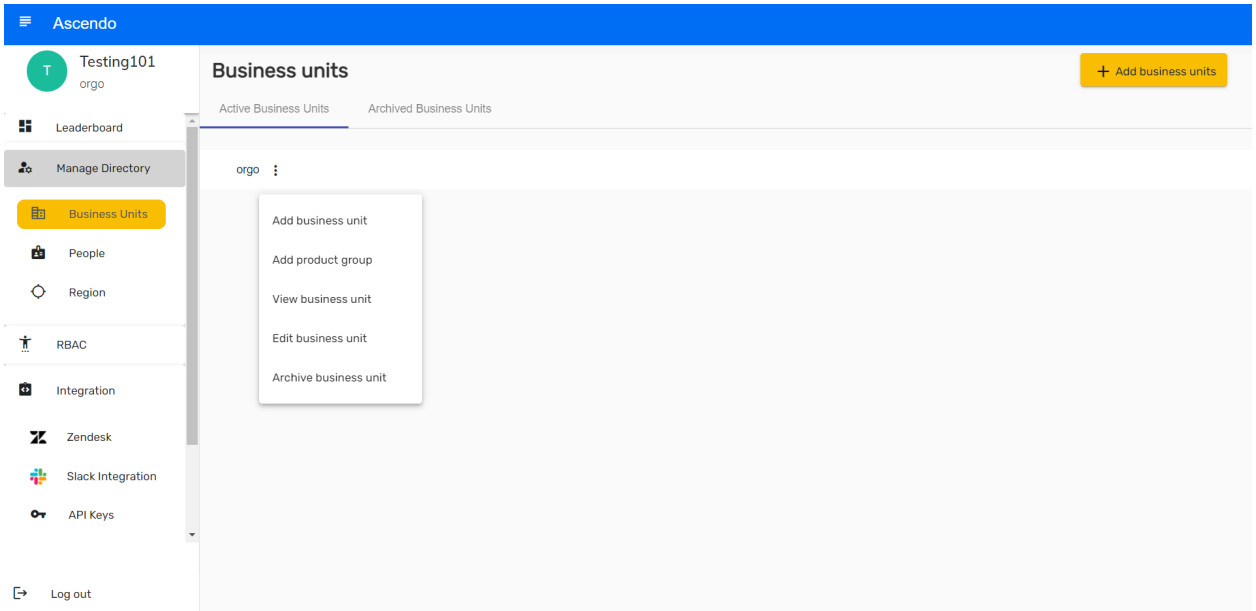
You will be provided with a default business unit that gets created on signup.You can create more business units with the add business units button on the top right corner



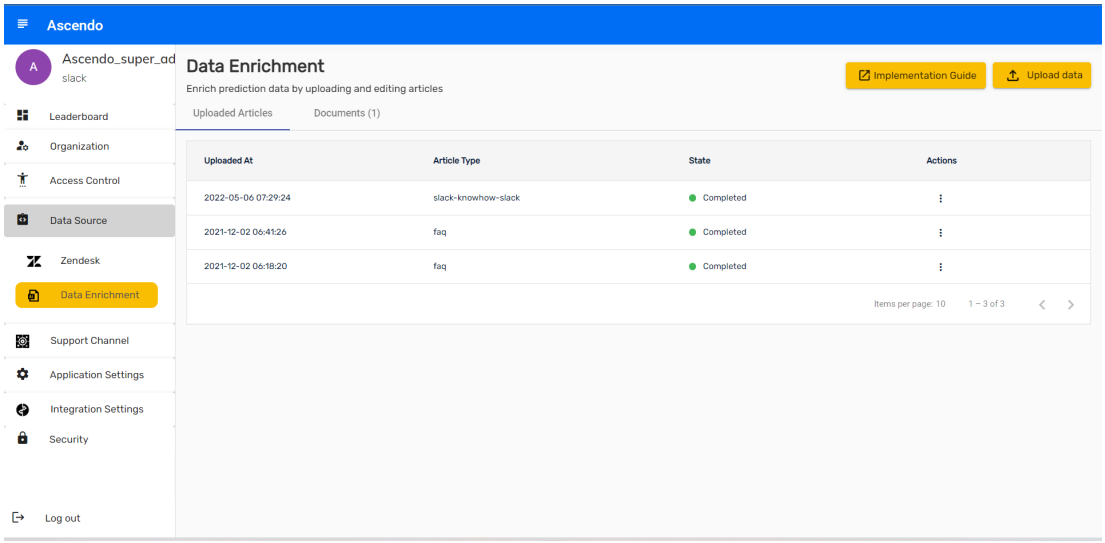
7)Fill in the required details to to create a new business unit



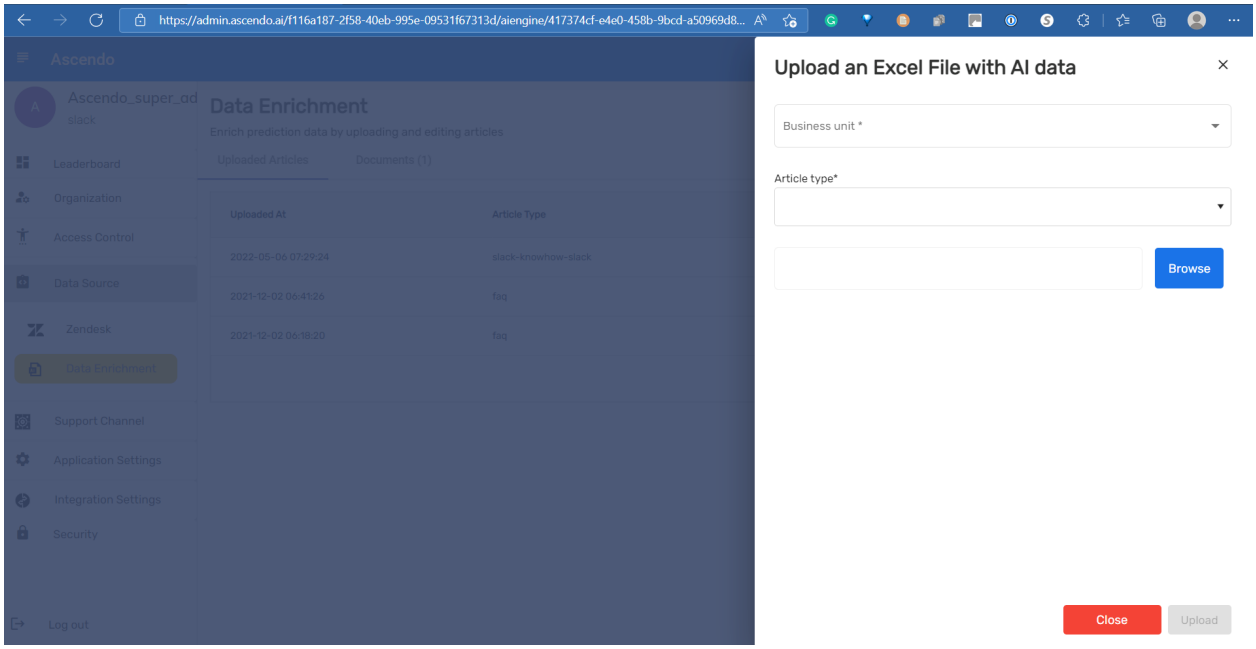
You can add a business unit under a business unit to create a hierarchy.At the very end you will have to add a product group corresponding to which you can upload the data and get prediction results from Ascendo's slack app based upon them.You can add a product group corresponding to a business unit by clicking on the 3 dots besides the business unit name and selecting **Add product Group** option.You can also add a business unit from the same options menu.



After creating the Product group under a business unit or a hierarchy of business units,go to **Data Source >>Data Enrichment** where you will have to provide data in CSV format for all your product groups.



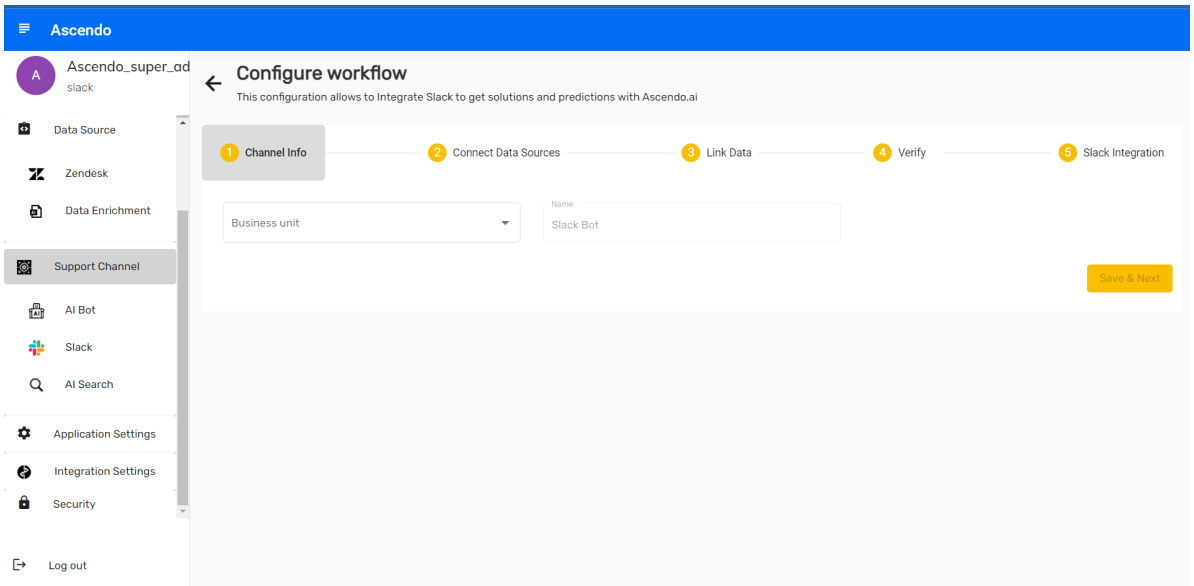
Click on **Upload data** button.You will be asked to upload a csv file corresponding to your product's business unit.The CSV file should be certain mandatory headers.You can download a sample blank CSV file with the required headers to get an idea about what all headers are needed.You have classify your csv file to be uploaded in the **Article Type** field.



Note-Once a particular CSV file is uploaded under a certain Article type,you will have to upload CSV file with the same format if selecting the same Article Type

6 Configuring Slack Channel

Go to **Support Channel >>Slack** and click on **+New Integration** button.You will be asked to provide steps to configure slack channel.



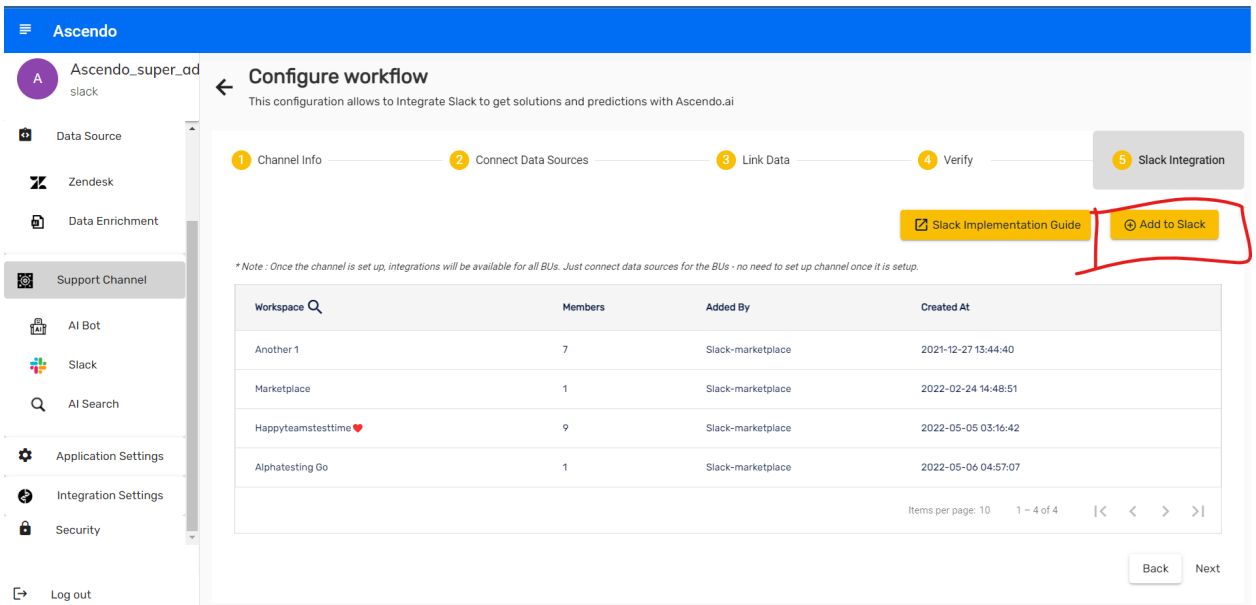
You will go through the guided workflow to pick the Business Unit to connect slack, Data Sources to pick, Data types to link, verify and click on the final step of Sack Integration.

7 Adding Ascendo to Slack

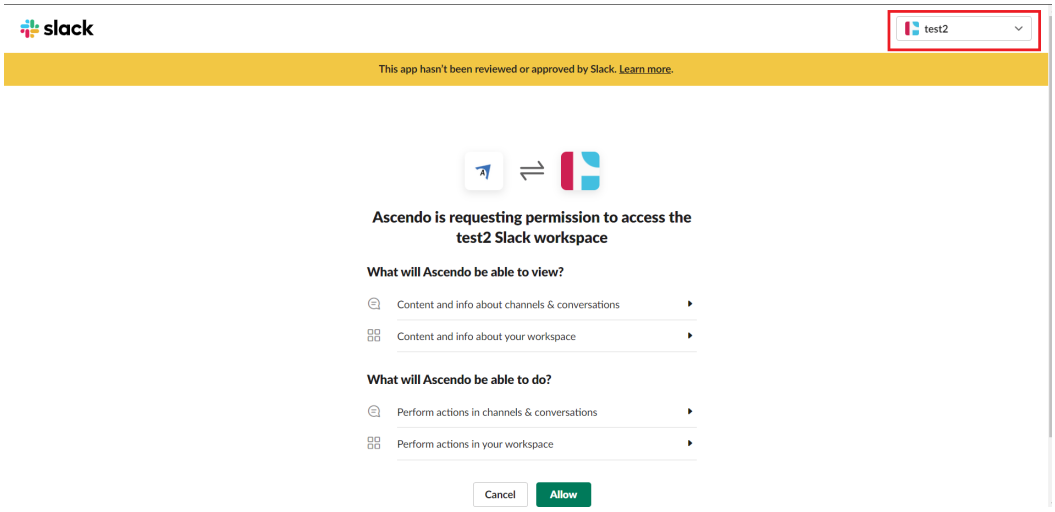
You can add Ascendo to slack using two methods. One option is to add to slack at the end of setting up the slack channel. The other option is to go to https://www.ascendo.ai/slack and add to Slack from there. Below sections provide details on both the methods:

7.1 Adding Slack at the time of setting up Slack CHannel

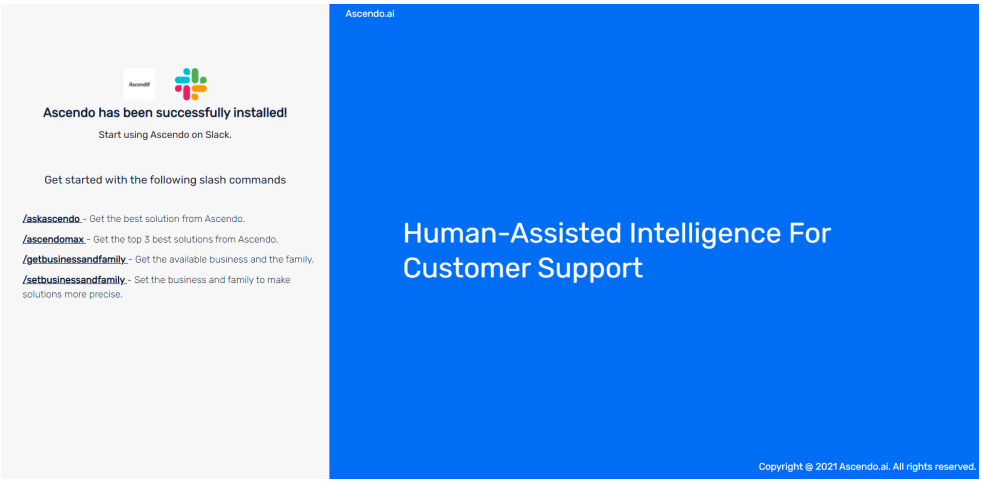
After completing the slack channel setup wizard, Click on the **+Add to Slack** button.



You will be will be directed to the slack default page asking for permission to install the app in the user's workspace.At the top right corner the user can see the option to install the app in the workspace of their choice(**test2** in this case).After deciding the workspace click on the **Allow** button.



After clicking the **Allow** button the user will be led to a page marking the successful installation of the app.



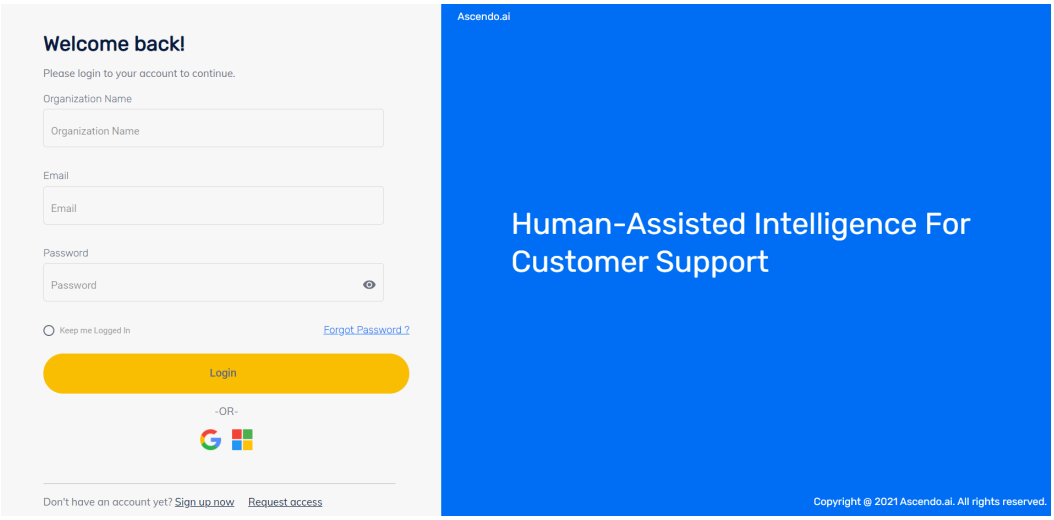
Note-In case the user clicks the **cancel** button,they will be redirected to https://www.ascendo.ai/slack .

7.2 Adding Ascendo from the Ascendo web page

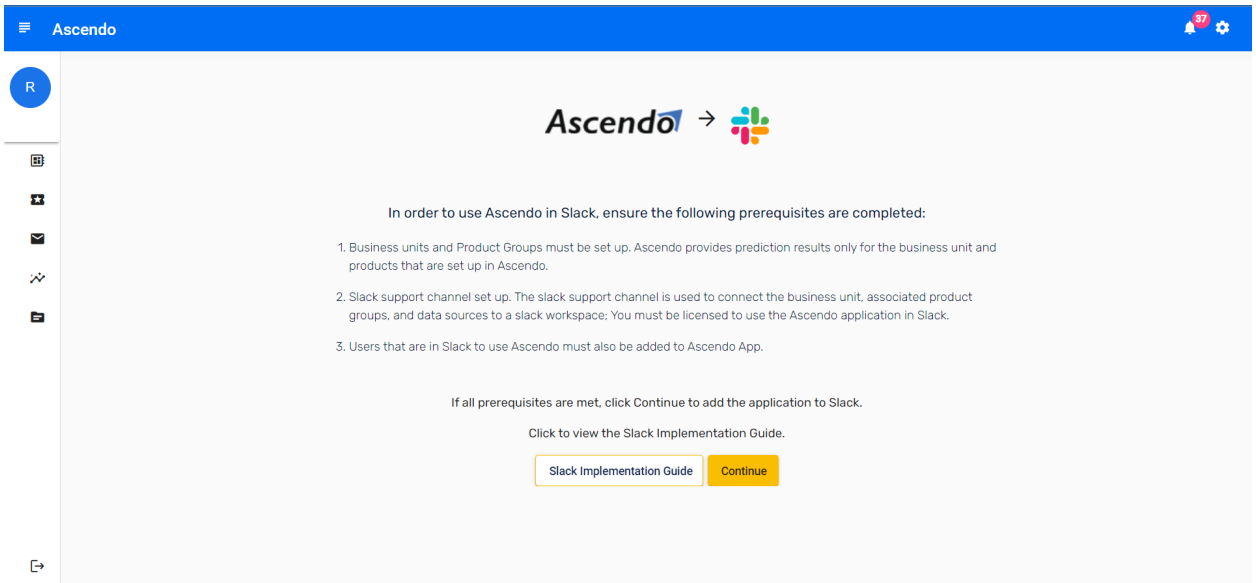
To add the Ascendo app to Slack, users can go to https://www.ascendo.ai/slack and click on the "Login to Ascendo to install slack app" button. You will be redirected to a page asking for your ascendo credentials. After successful user authentication you will be redirected to a slack default page which will ask permission to allow the app into the user's workspace. After successfully allowing,the user will be taken to a page showing that the installation was successful and the user can start using the app in their workspace.

1) Click on https://www.ascendo.ai/slack and click on "**Login To Ascendo to Install Slack App**"button

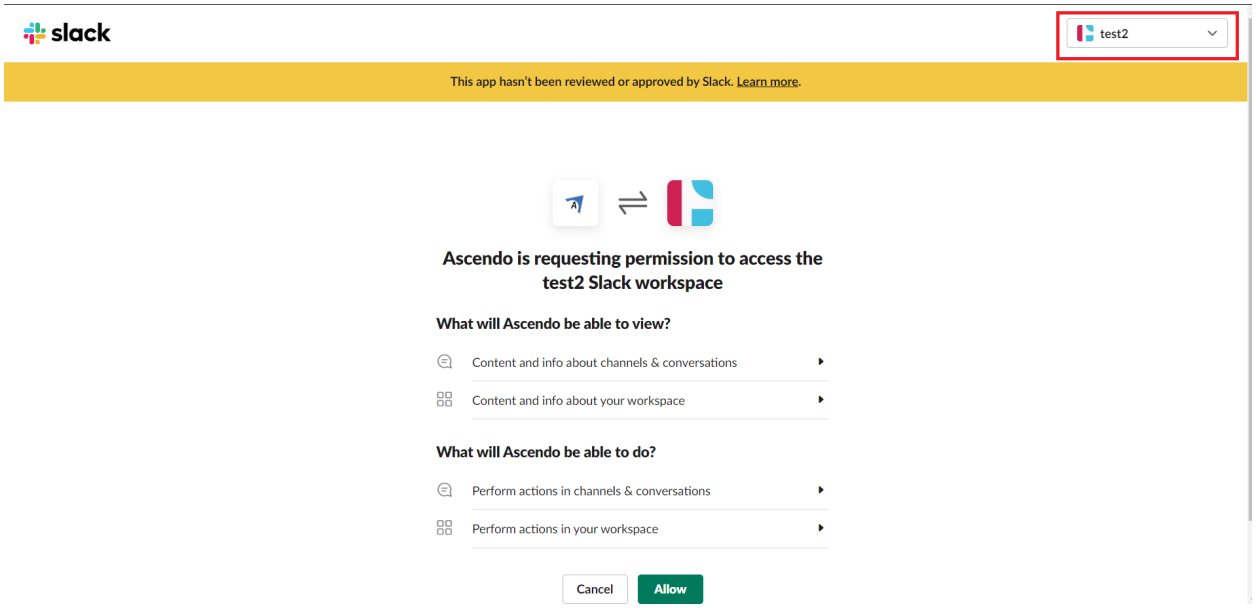
2) Upon clicking the link the login page will open.Enter your credentials to continue.



3) After a successful log in, Ascendo will make sure all the prerequisites are met - see below the screen that shows the requirements.

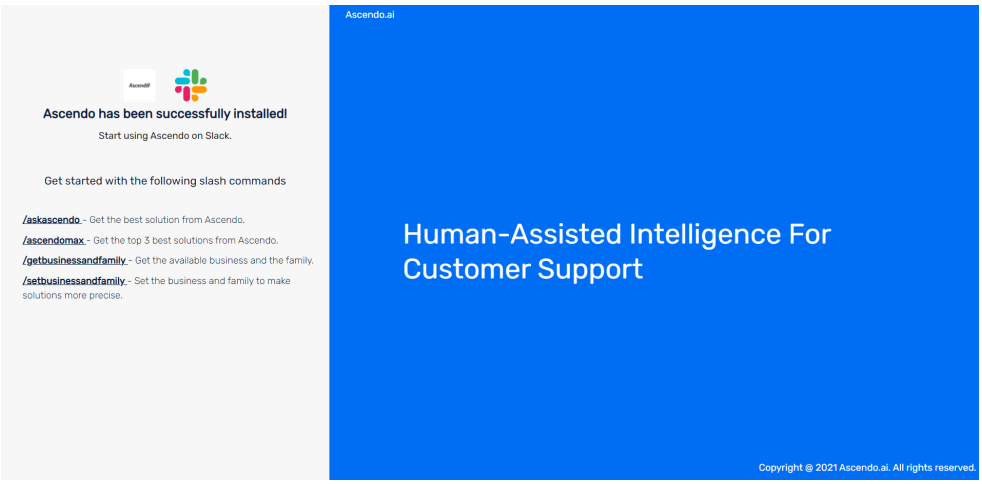


4) Once the prerequisites are done, press Continue. The user will be directed to the slack default page asking for permission to install the app in the user's workspace.At the top right corner the user can see the option to install the app in the workspace of their choice(**test2** in this case).After deciding the workspace click on the **Allow** button.



Note-In case the user clicks the **cancel** button,they will be redirected to https://www.ascendo.ai/slack from where they can start the installation procedure again

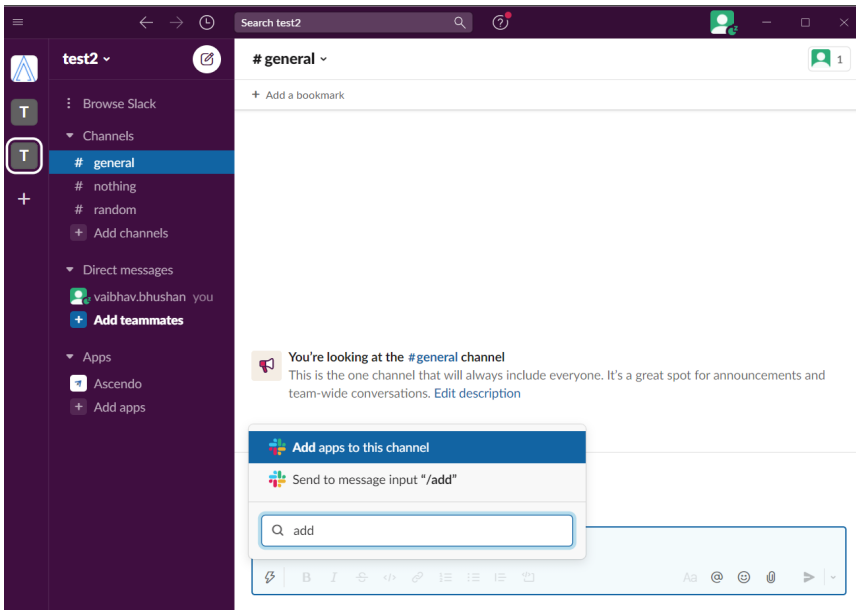
After clicking the **Allow** button the user will be led to a page marking the successful installation of the app.



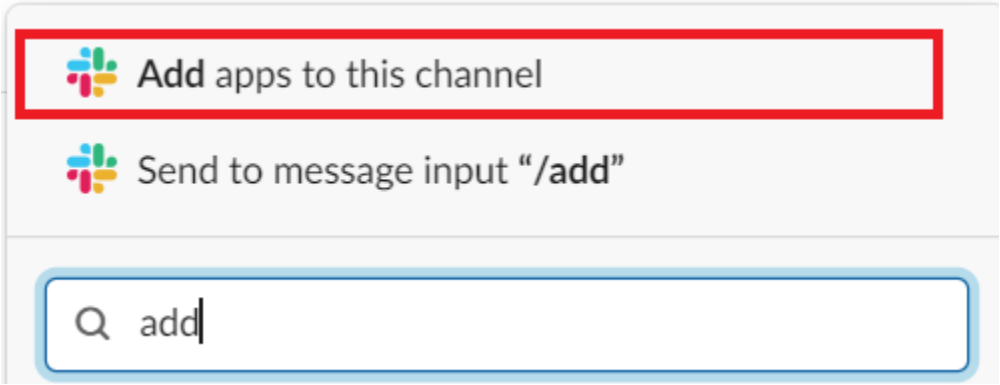
8 Adding the app in a slack channel

8.1 Adding the App

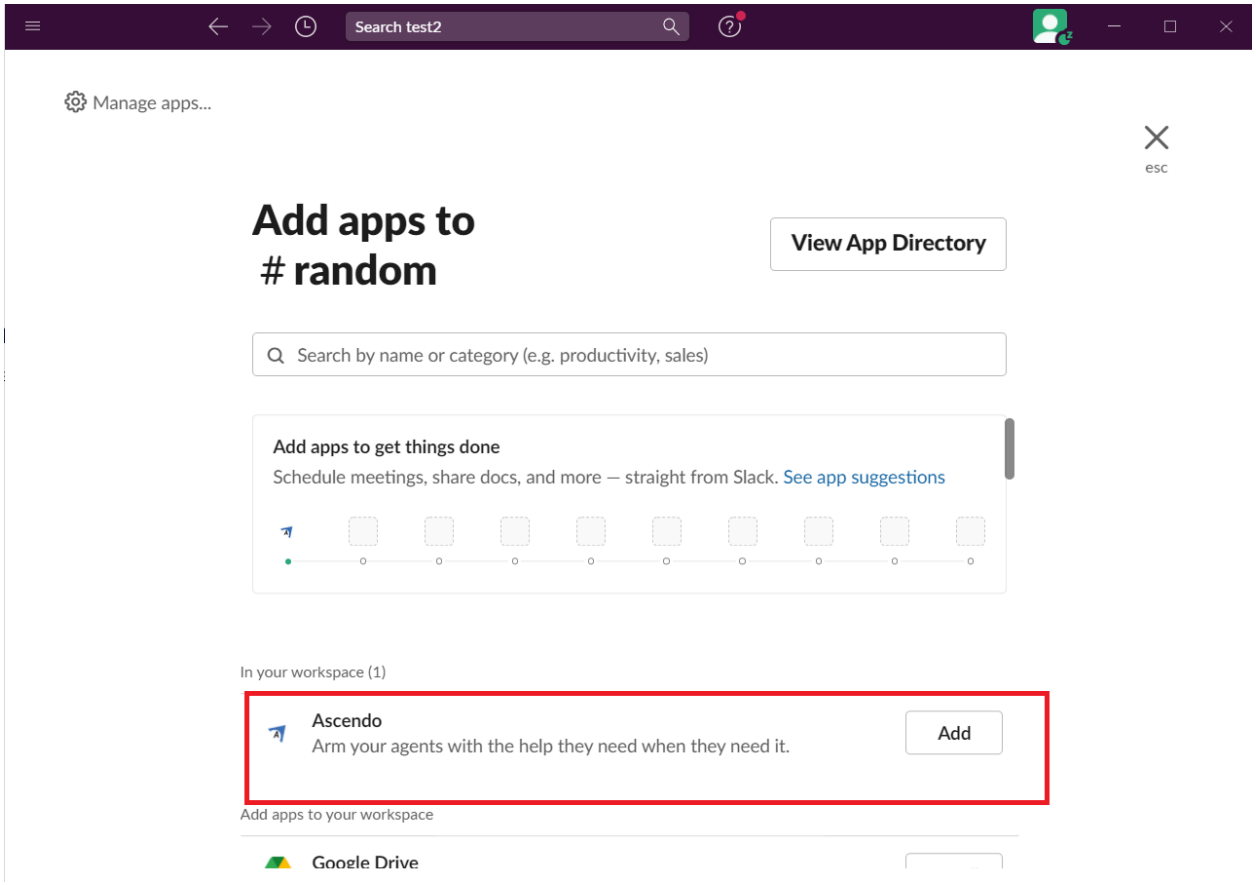
Once the app is installed,you can add it to any channel you want in your workspace.To add the app to a channel go to that channel and type **/add**.



Click on "**Add apps to this channel**"



Search "**Ascendo**" and add it.

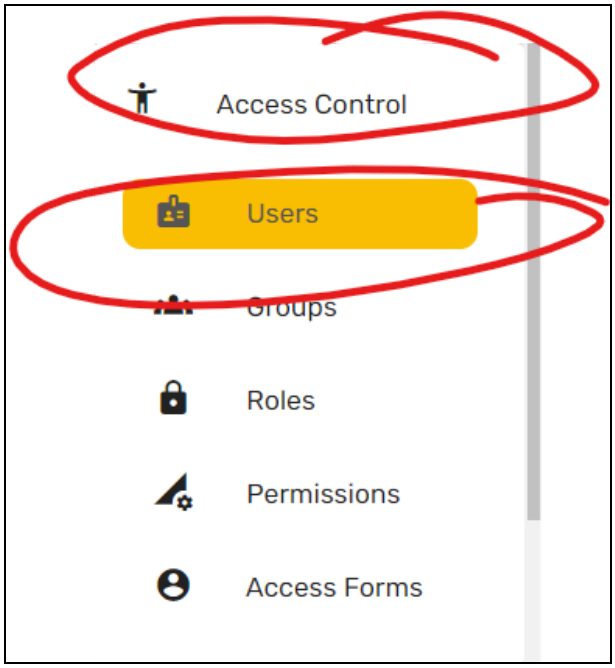


Once the app is added the user can start using it providing they are already authorized to use it in Ascendo. The next section shows how to authorize users to use slack applications.

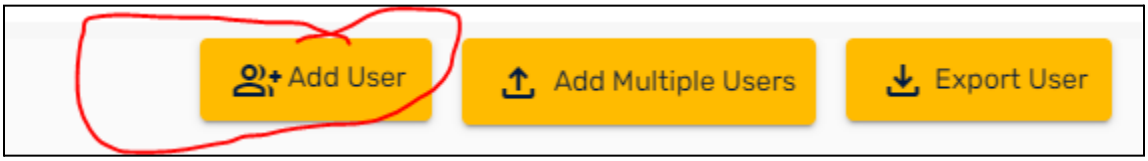
8.2 Authorizing a User to use Slack Command

Ascendo requires the user to be an authorized user within the Ascendo app. Please copy your email address from your slack workspace and use same email in below steps (this is required as we allow only authenticated user within Ascendo to use slack commands):

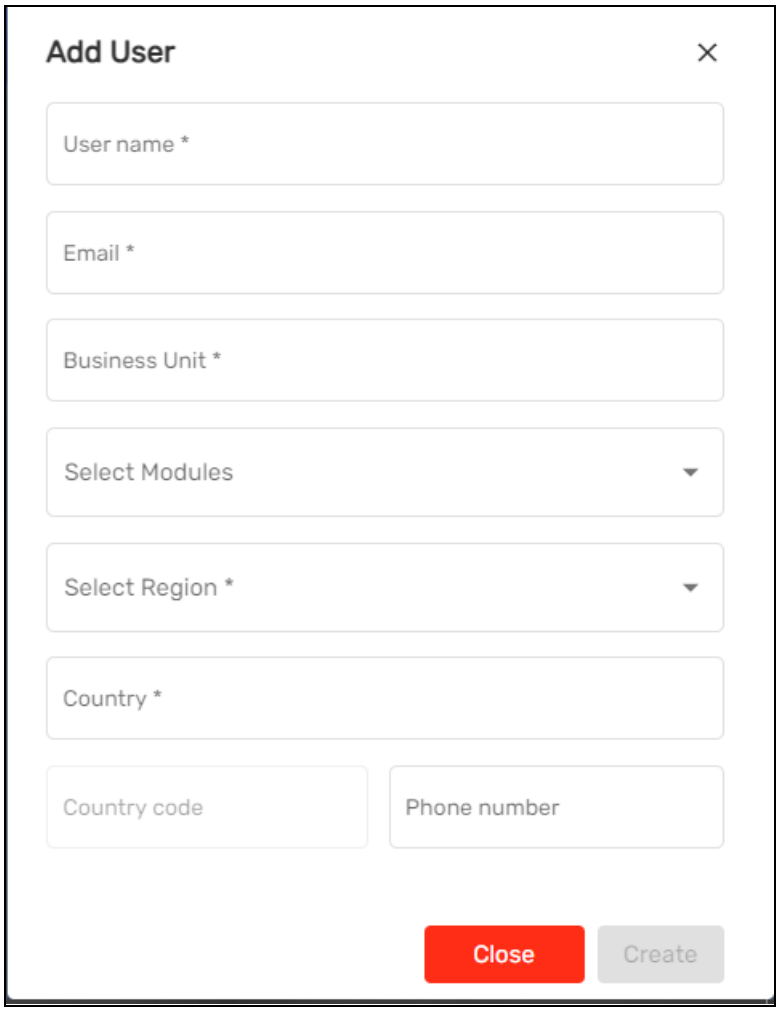
1. Login to https://slack.app.ascendo.ai using the credentials of slack customer
2. Now, after login, on top right, you'll see a gear button, click on that and then click on Administration
3. Now go to Access Control section and then Users



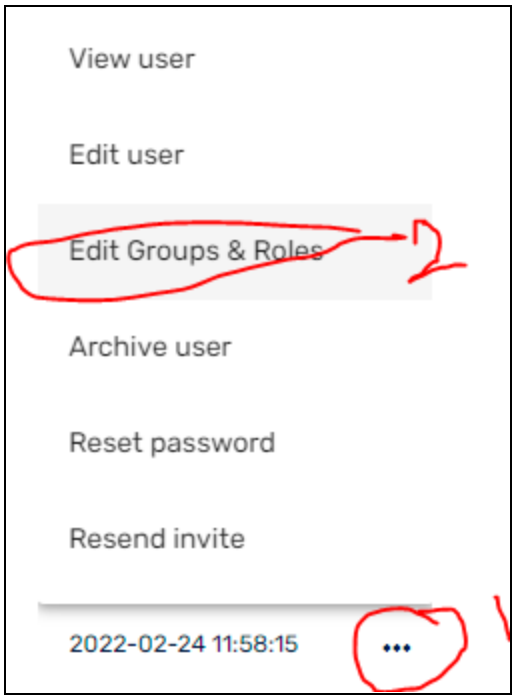
4. Now click on Add user to add your user



5. Now, add the required details and add the **email(with whichever email you want to use Ascendo app from your workspace), No Need to Select any module**



6. Logout and check your email for the invitation and follow the instructions and set ur password
7. Now login back using the credentials provided by Ascendo and now you need to assign roles and permissions to your user you just added
8. Login and click on gear button and go to Manage directory and then people
9. Now, against your user entry click on Action(3 dots) button and click edit groups and roles



10. Now, add any role(at least 1) **and** any group(at least 1) and save it
11. Now, enjoy using our Ascendo app in your workspace and our app is too ready to solve your problems

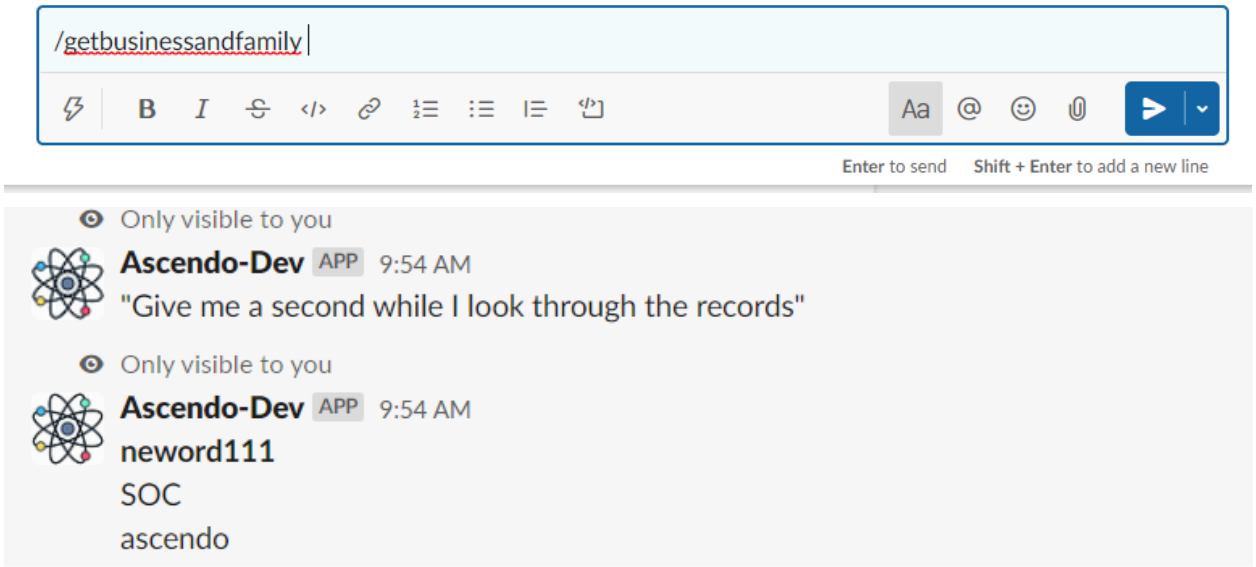
9 Using the app in a slack channel

9.1 Slack Commands

This section provides the list of commands available from slack.

9.1.1 /getbusinessandfamily-

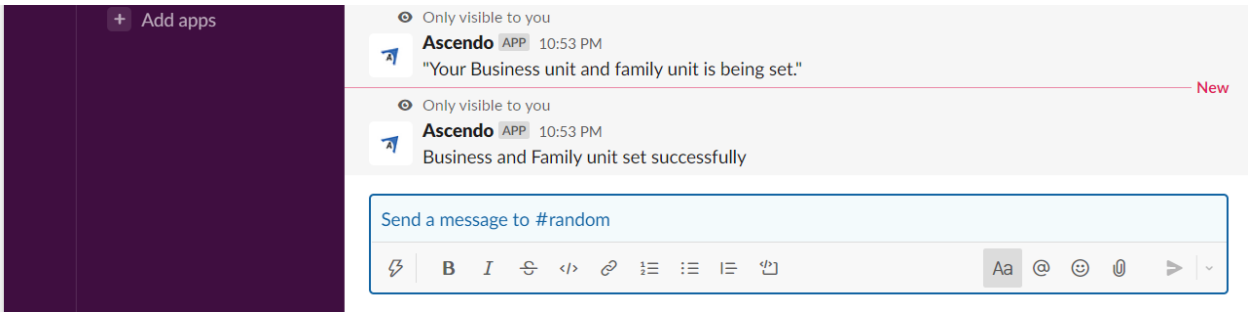
This command gives a list of the business and products affiliated with your company for which Ascendo is providing support.No other input is required.Things written in bold text are business units while the things listed under then which are not in bold text are the product families under the business unit.



9.1.2 /setbusinessandfamily-

This command is used to set the business and products affiliated with your company for which Ascendo is providing support.This command takes in two arguments, the business(neword111) and product (ascendo)for which the user will require Ascendo's predictive services.The two arguments(business and family) should be from the list of business and product provided by **/getbusinessandfamily** command since you cannot use Ascendo's predictive services for the products you have not subscribed for**.**You can't use Ascendo's predictive services unless you set your business unit and family

/setbusinessandfamily neword111, ascendo



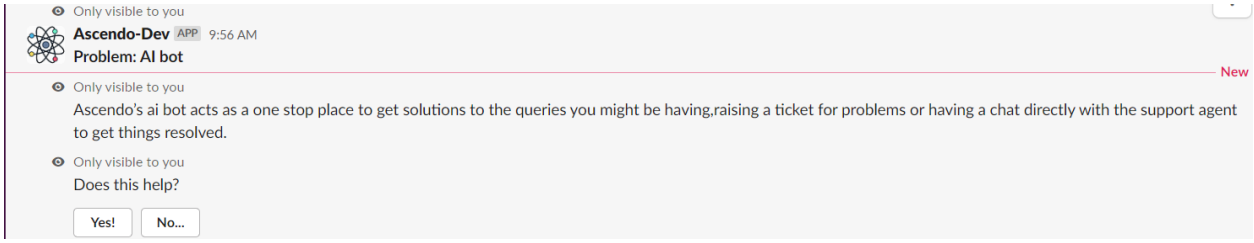
9.1.3 /askascendo

This command takes in a problem statement and provides the best solution to the problem asked with the help of Ascendo's prediction engine.

In the screenshot below "**ai bot**" is the problem statement

/askascendo AI bot

On sending the above the best solution will be provided like shown below-



9.1.4 /ascendomax

This command is similar to the **/askascendo** command. It provides 3 best solutions for the problem statement given.The first solution is the recommended solution and the other 2 are alternative solutions.

/ascendomax AI bot

Only visible to you

Ascendo-Dev APP 9:57 AM

"Command successful, wait for a while to get the top 3 best solutions..."

Only visible to you

Ascendo-Dev APP 9:57 AM

Problem: AI bot

New

Only visible to you

Recommended Solution

Ascendo's ai bot acts as a one stop place to get solutions to the queries you might be having,raising a ticket for problems or having a chat directly with the support agent to get things resolved.

Alternative Solution 1

The name and email is asked so that the next time you come to the ai bot you will not have to provide the name and email again,the ai bot will recognise your name based upon your email

Alternative Solution 2

The default queries that the ai bot are the most frequently asked questions.You don't have to necessarily select any one of them but can type out your own query and get the results.

Only visible to you

Does this help?

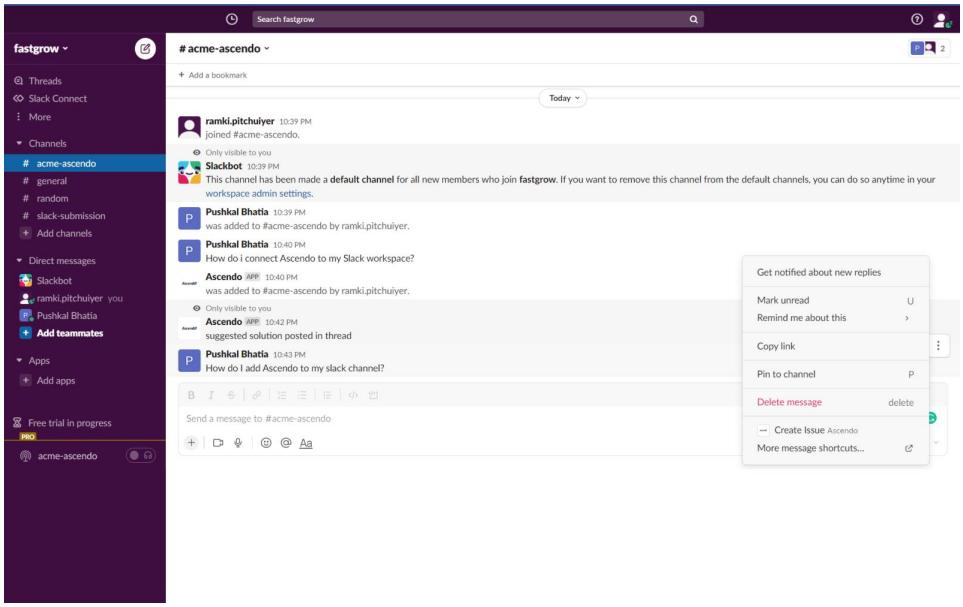
Yes! No...

9.2 Message Shortcuts

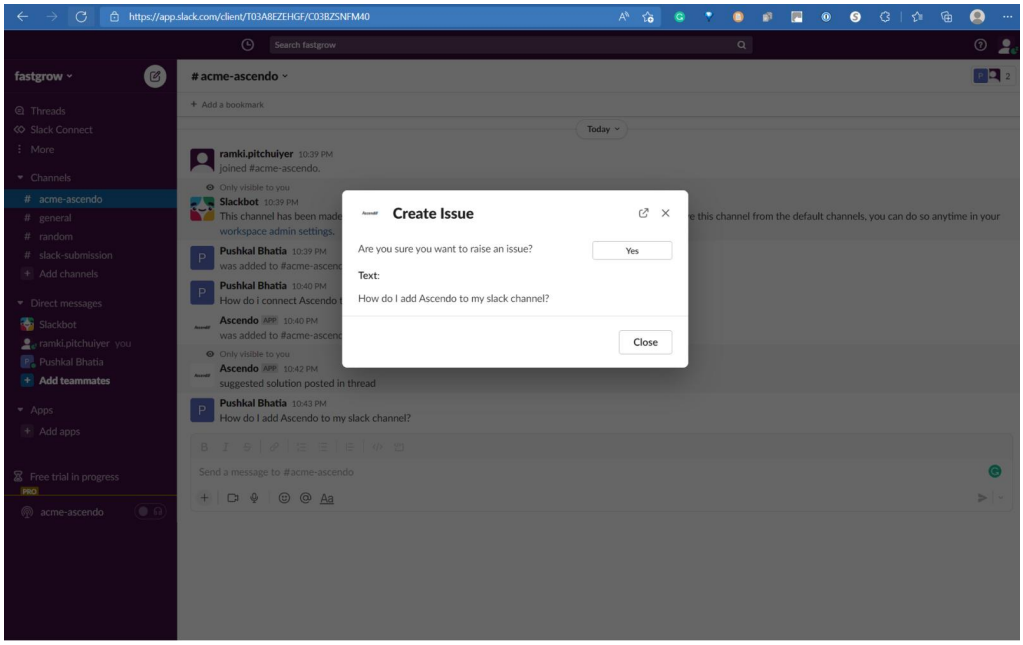
This section provides the list of message shortcuts.

9.2.1 Create Issue

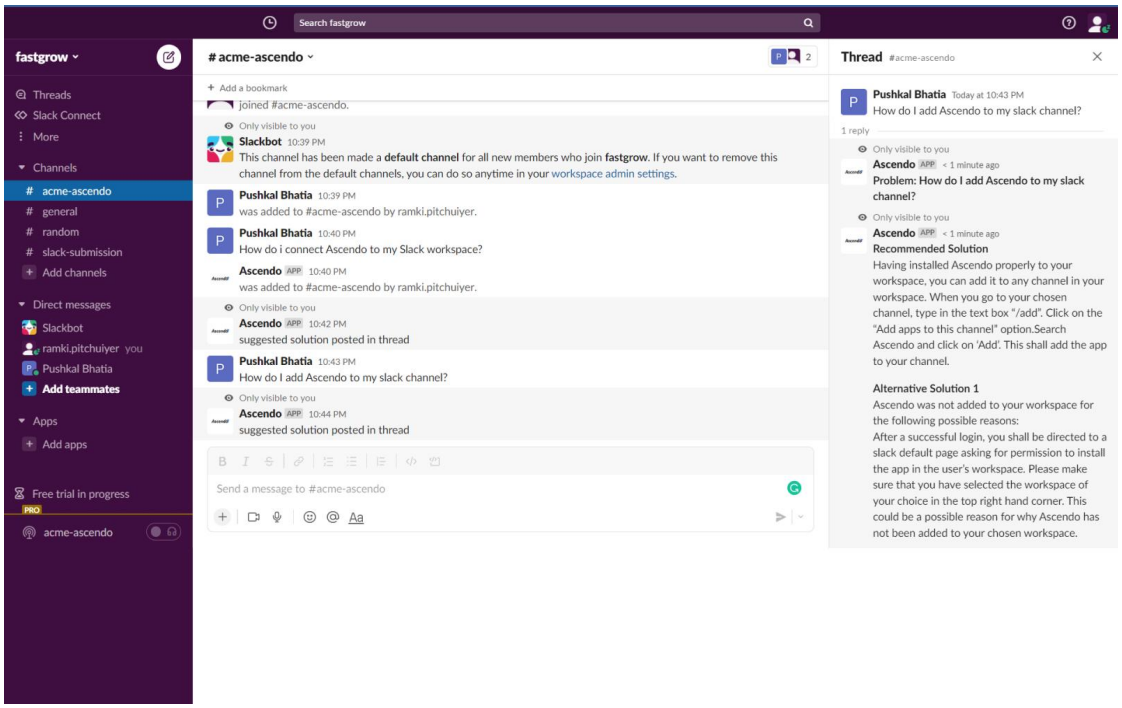
Ascendo provides a way to create issues from within Slack. When a message comes, user can click on the message shortcut and pick Create issue:



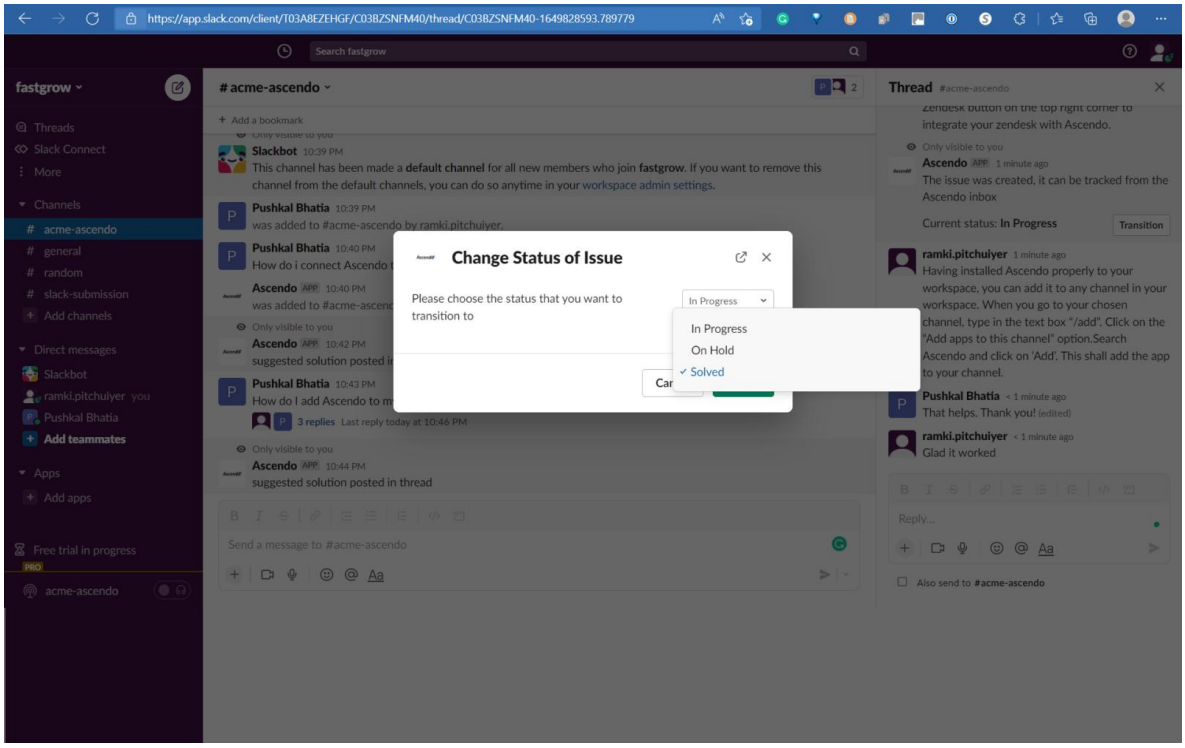
After clicking the shortcut, Ascendo will ask to confirm as follows:



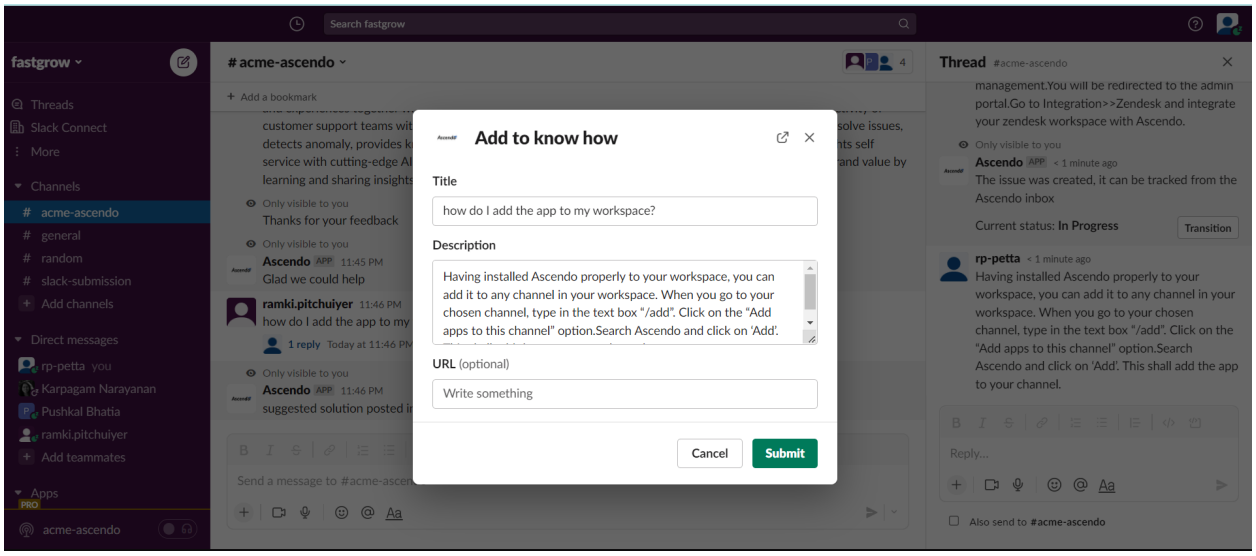
Click Yes to confirm creating the issue. Once the issue is created, Ascendo will automatically provide recommendations. Below image shows the recommendations:



The user (support agent) can also transition the issue to In Progress or SOlved or Hold as follows:



Ascendo also provides an option to add new knowledge by the user. The user can click on the Add Know-How message shortcut. Ascendo will automatically detect the question and the answer for user confirmation as follows:



Users can edit the title and the description, and click submit to add to the Ascendo knowledge repository for future prediction use.