Microsoft Teams Virtual Agent

Motadata ServiceOps

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1. Overview

1.1. What is Microsoft Teams and Virtual Agent App?

Microsoft Teams or Teams is an application to communicate with your team members. Using Teams for incident creation and management will become easier if you add the ServiceOps Virtual Agent as an app within Teams. Once added, you can generate or review requests from Teams without signing-in to the Support Portal or accessing the virtual chat agent from the portal.

You can integrate a custom-built Teams app that connects your ServiceOps Portal, enabling the Virtual Agent to send responses to the requester over the Teams application.

This functionality is applicable from version 7.7 and above.

1.2. Prerequisites

- Requester created in the ServiceOps portal
- Teams account created with the same requester email ID as created in the above point.

2. Creating and Configuring Teams Virtual Agent App

To create a Virtual Agent application, follow the below steps:

Step 1: Create or Open a Teams account with admin permissions.

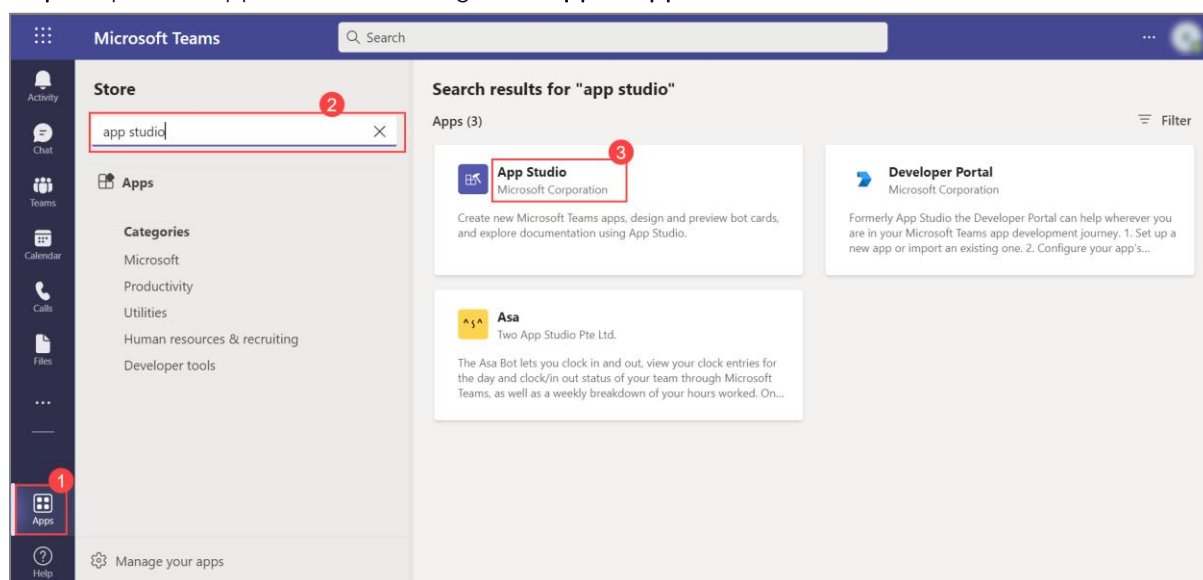**Step 2**: Open the application and navigate to **Apps > App Studio**.
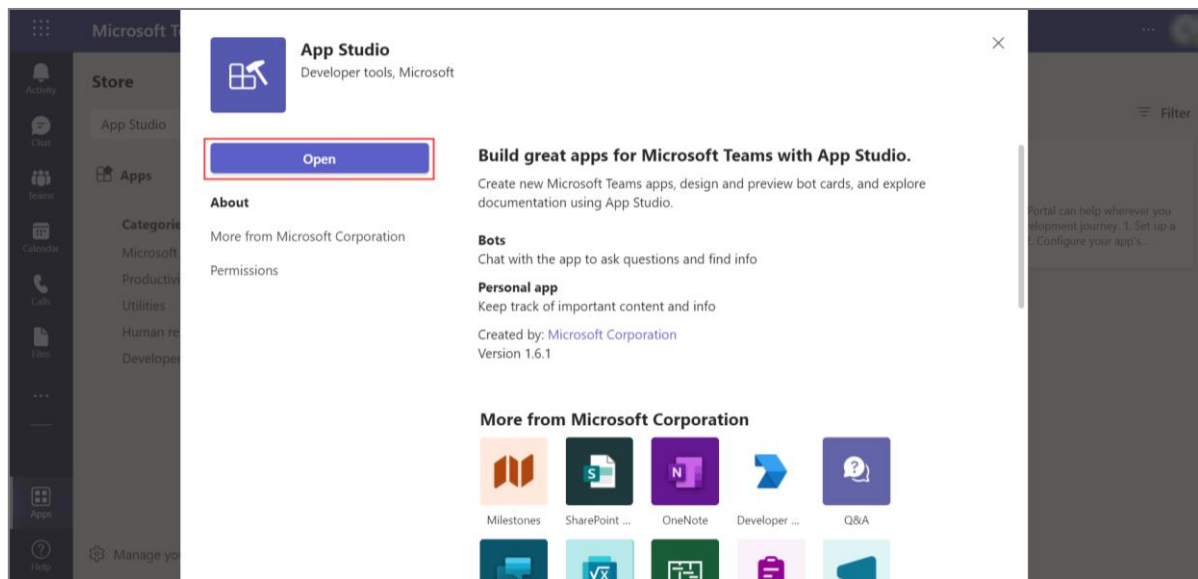

Fig 1: App Studio

Step 3: Click **Open**.

Fig 2: Open App Studio

Step 4: Select the option "**Import an existing app**" and select the zip file provided by Motadata. To download the zip file, click here.
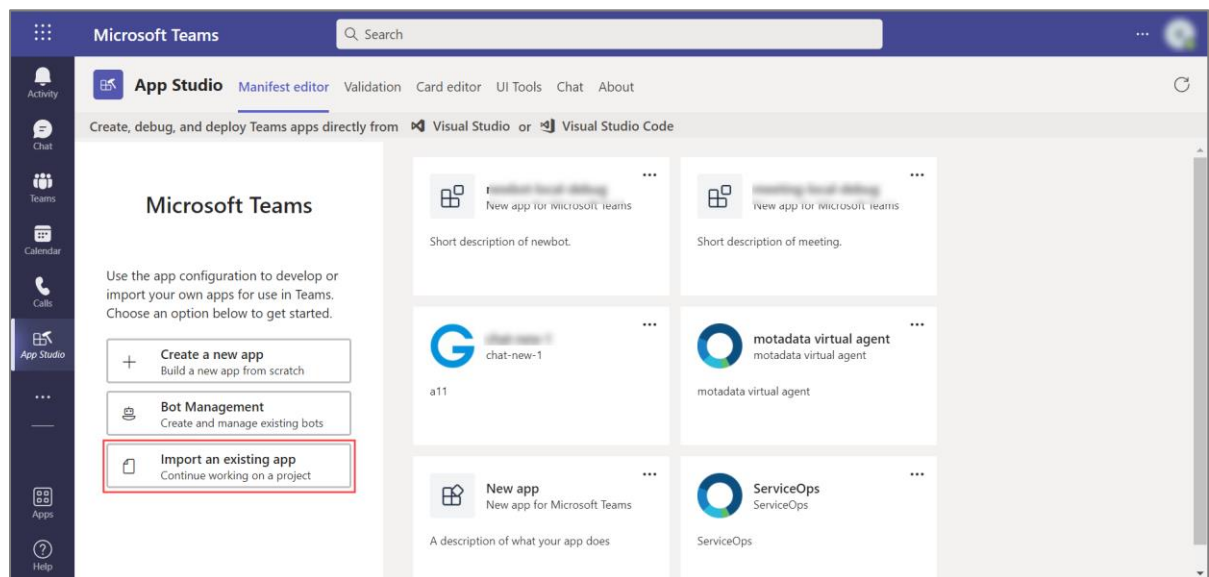

Fig 3: Importing an existing app

Step 5: **Edit an app** page will appear as shown below. Then, navigate to **Capabilities > Bots** in the left panel, and delete the existing bot.
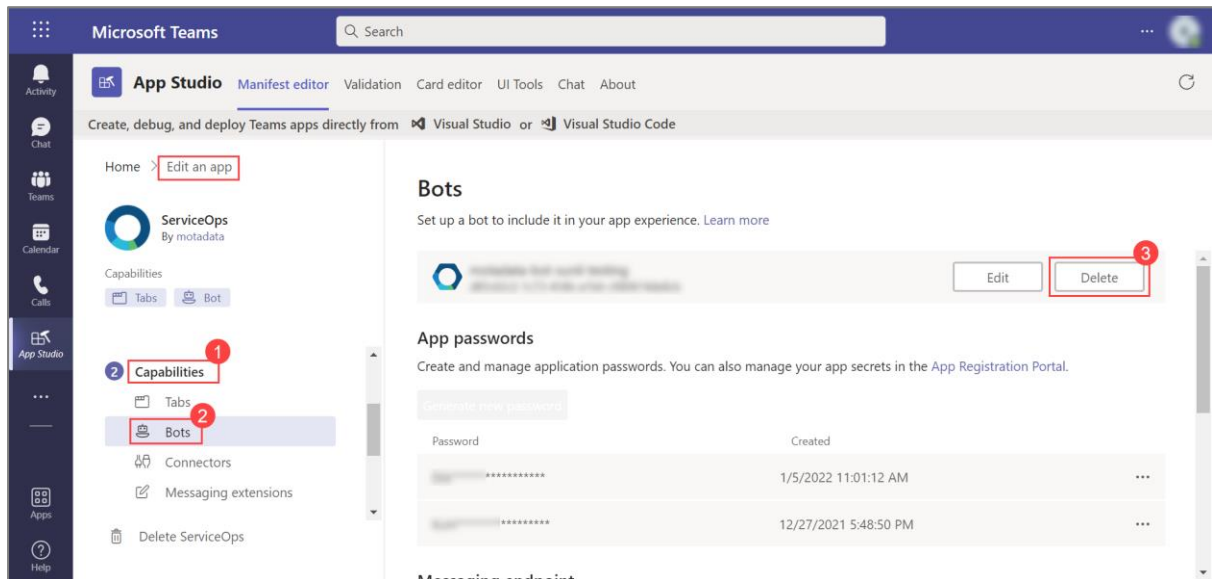

Fig 4: Deleting an existing app

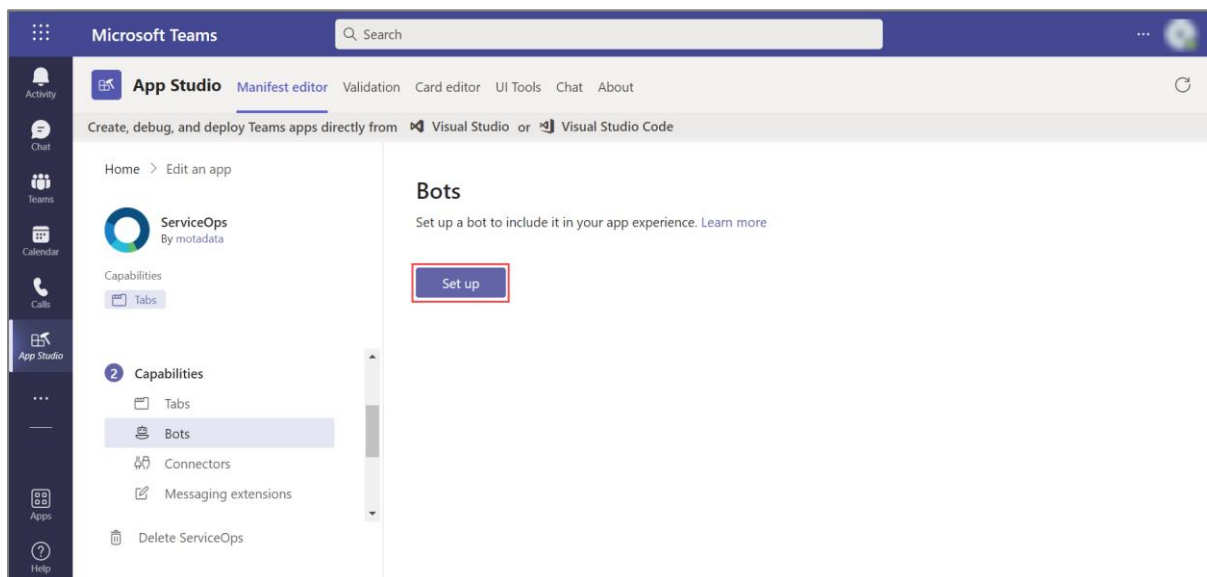**Step 6**: Create a new bot using the "**Set up**" button.

Fig 5: Setting up the Bot

Step 7: Configure the following details:

- **Name**: Enter the name of the bot.
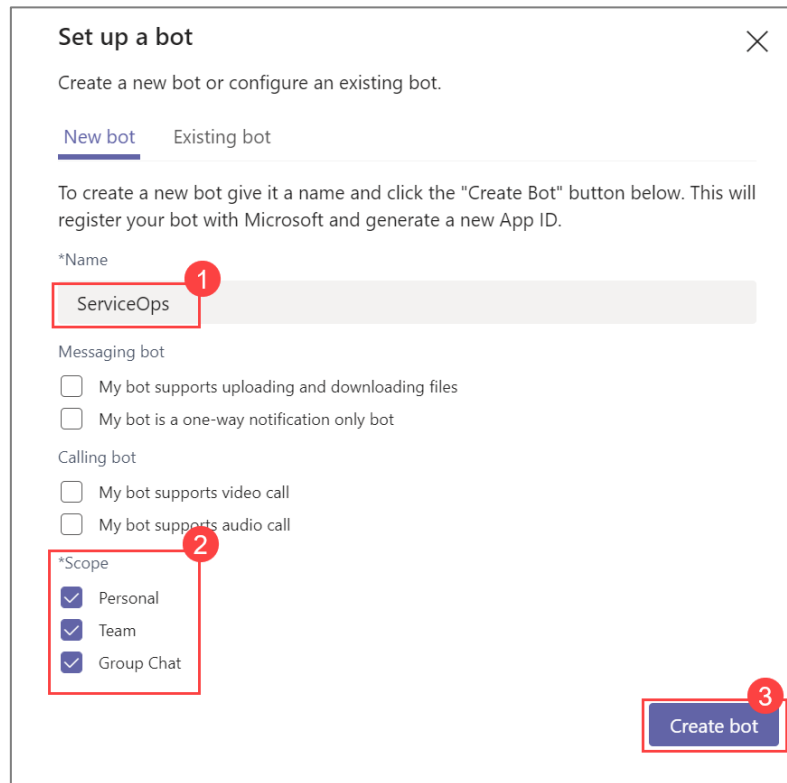- **Scope**: Select the scope of the bot. Options are Personal, Team, and Group Chat.

Fig 6: Bot Parameters

Step 8: Click **Create Bot**, and the bot gets created as shown below.

Copy the **Client ID** below the bot's name and use it in the ServiceOps Portal.
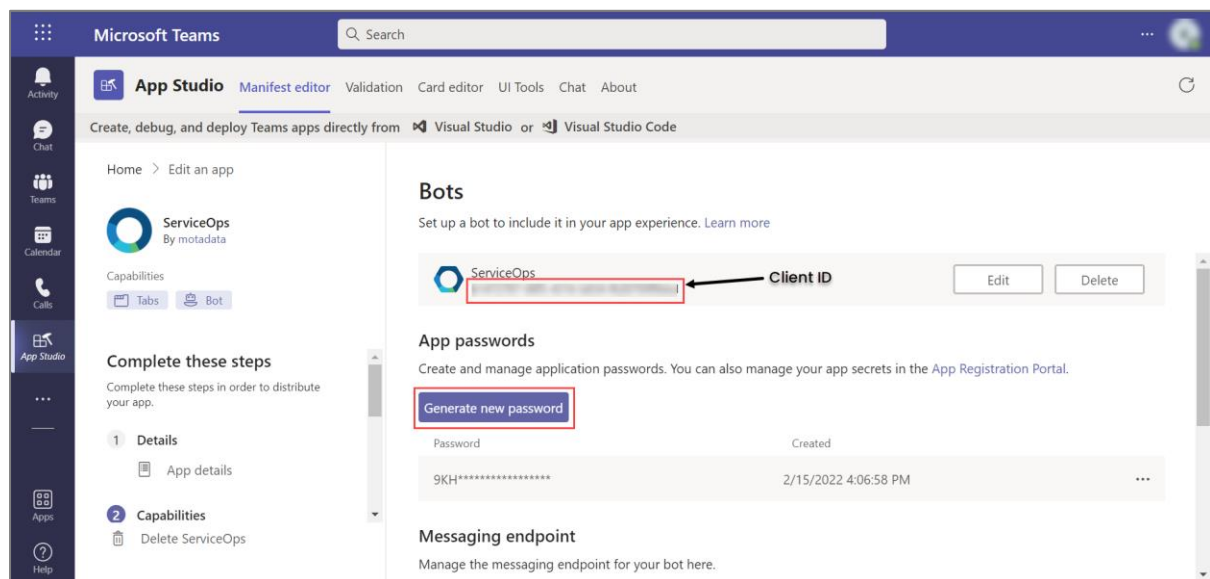

Fig 7: Client ID

Step 9: **Generate** a **new password**, and a pop-up displaying the generated password will appear. Use this password in the ServiceOps Portal.
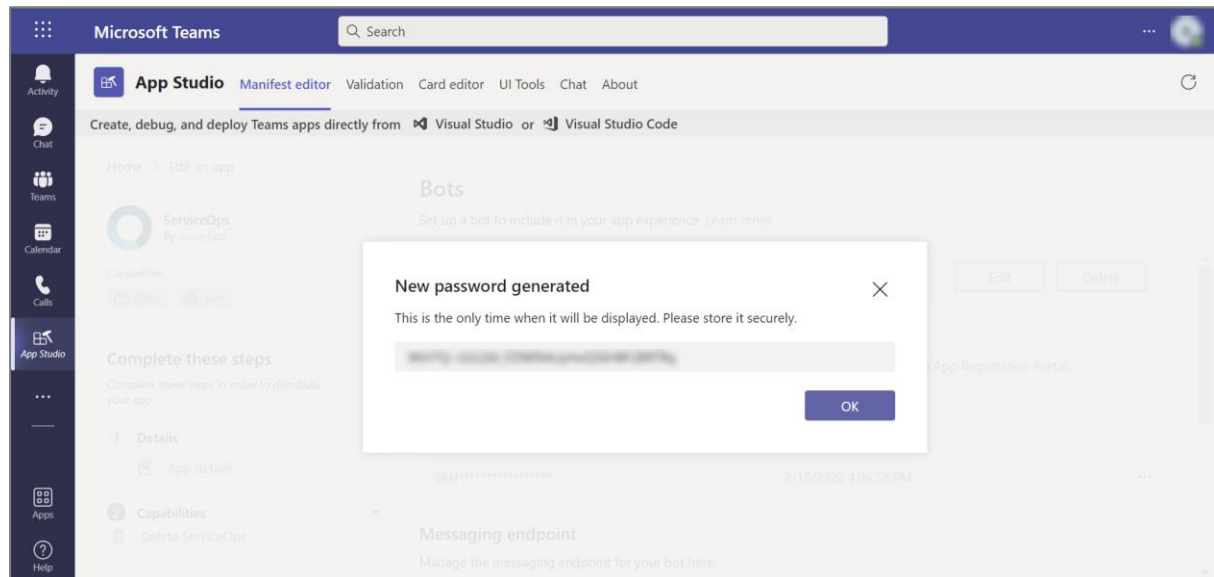

Fig 8: Generated Password

Step 10: In the **Messaging endpoint** section, change the base URL before the "**/api/public/teams/readMessage**" section, as shown below. It is the HTTPS URL on which Teams will send the message.
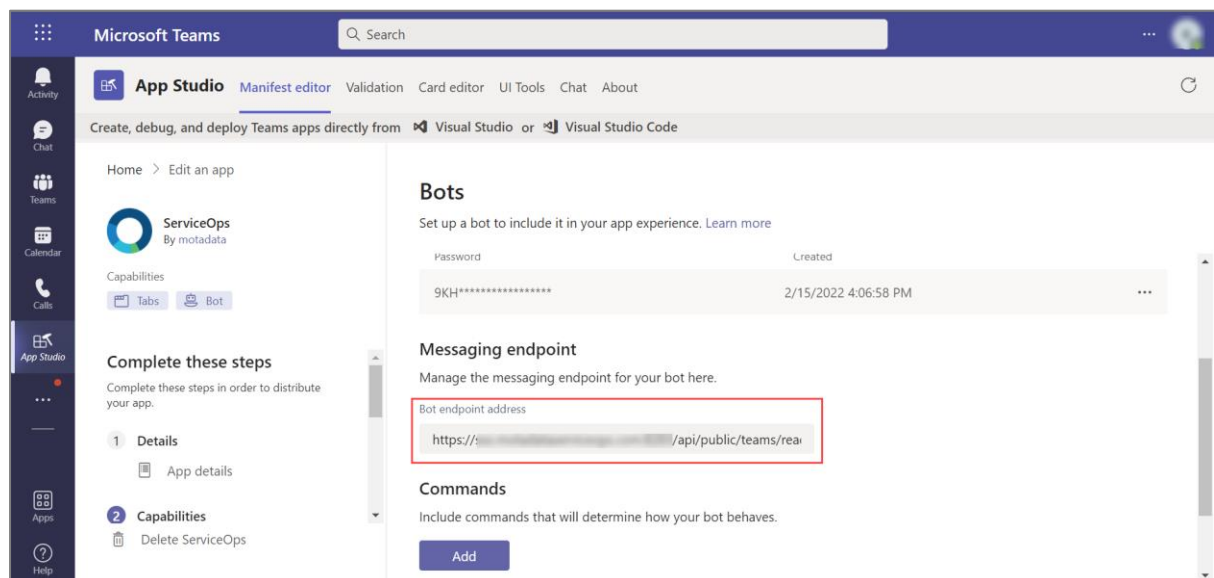

Fig 9: Configuring Messaging Endpoint

Step 11: In the left panel, navigate to **Finish > Test and distribute** and click **Download**.
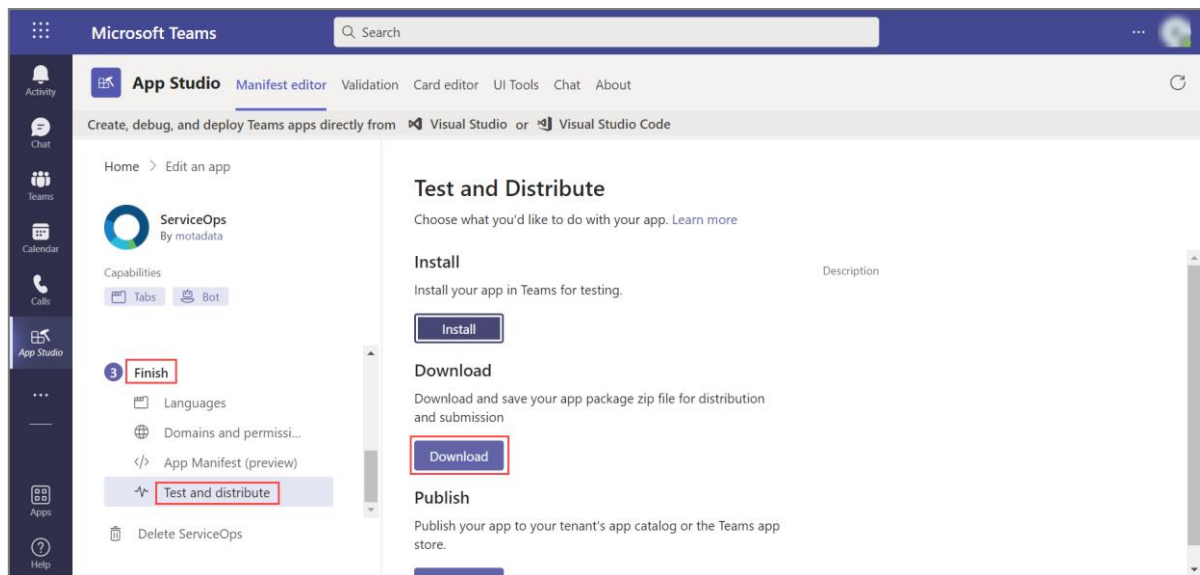

Fig 10: Downloading the App

Step 12: **Download the app** and attach it to the Attachments in the ServiceOps Portal below.
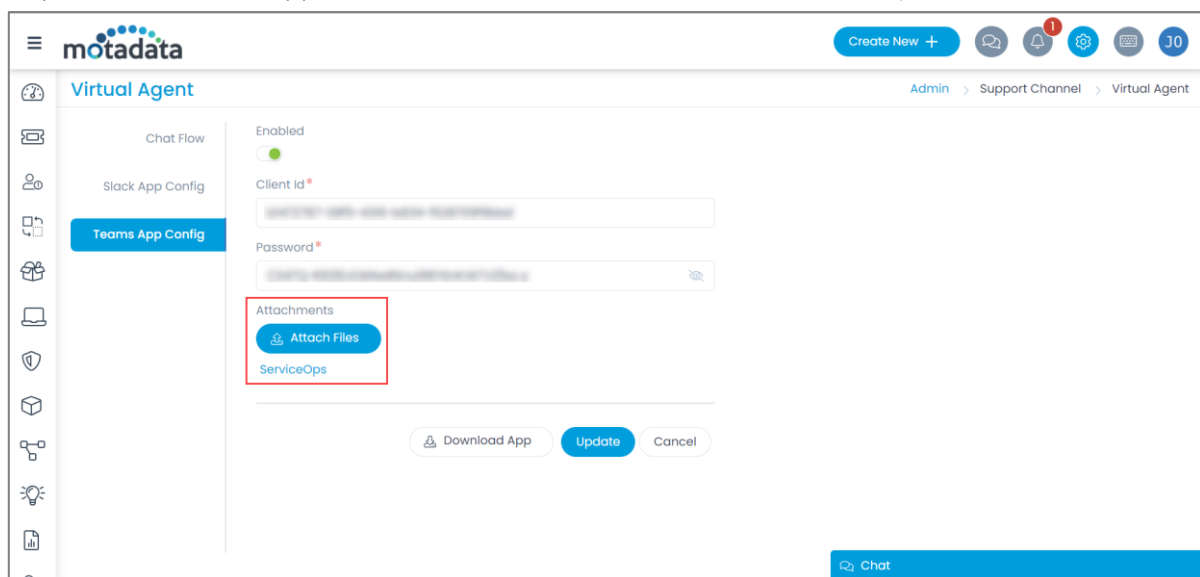

Fig 11: Attaching the app in the ServiceOps Portal

Step 13: In Teams, upload the app.

Navigate to **Apps > Manage your Apps**, and select the option as either "**Upload an app to your org's app catalog**" or "**Submit an app to your org**".

- If the option "**Upload an app to your org's app catalog**" is selected, upload the app downloaded from the Support Portal.
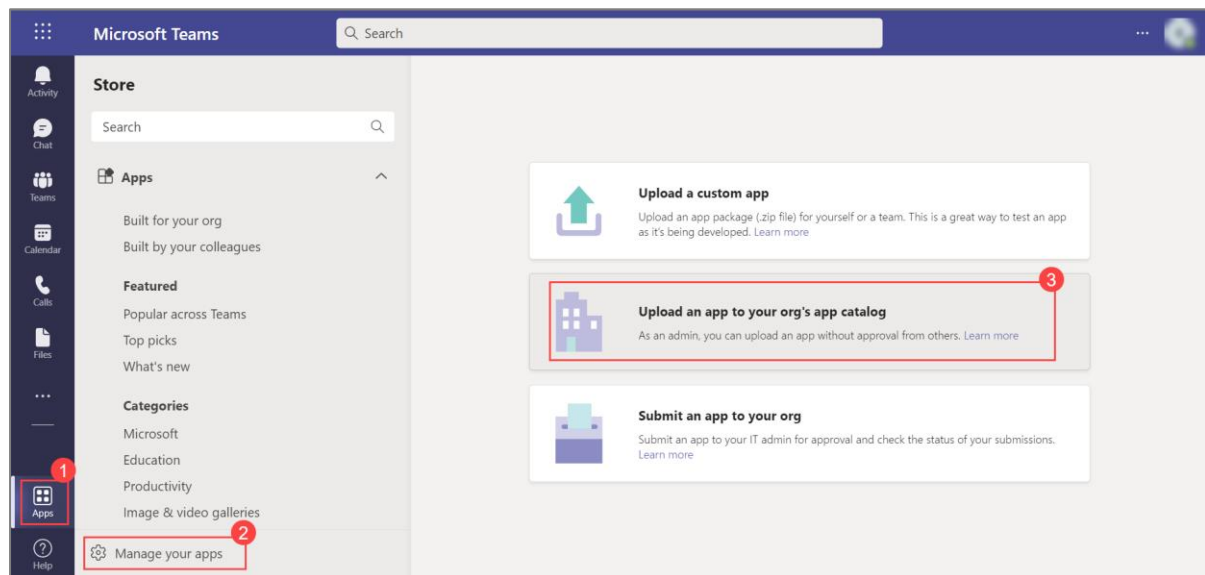

Fig 12: Uploading the app to your org's app catalog

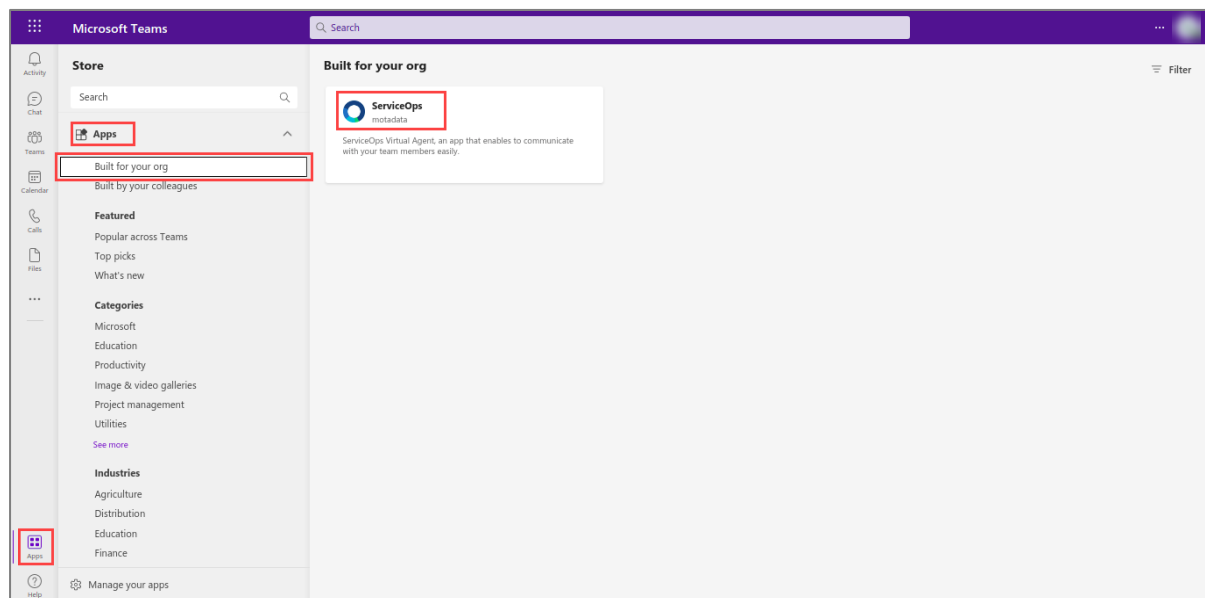Once uploaded, the app will be available in your app's catalog, as shown below.

Fig 13: App's Catalog

- If the option "**Submit an app for your org**" is selected, submit the app to your IT Admin for approval using "**Submit an app**". Once submitted, it will be available in the approval queue, as shown below.
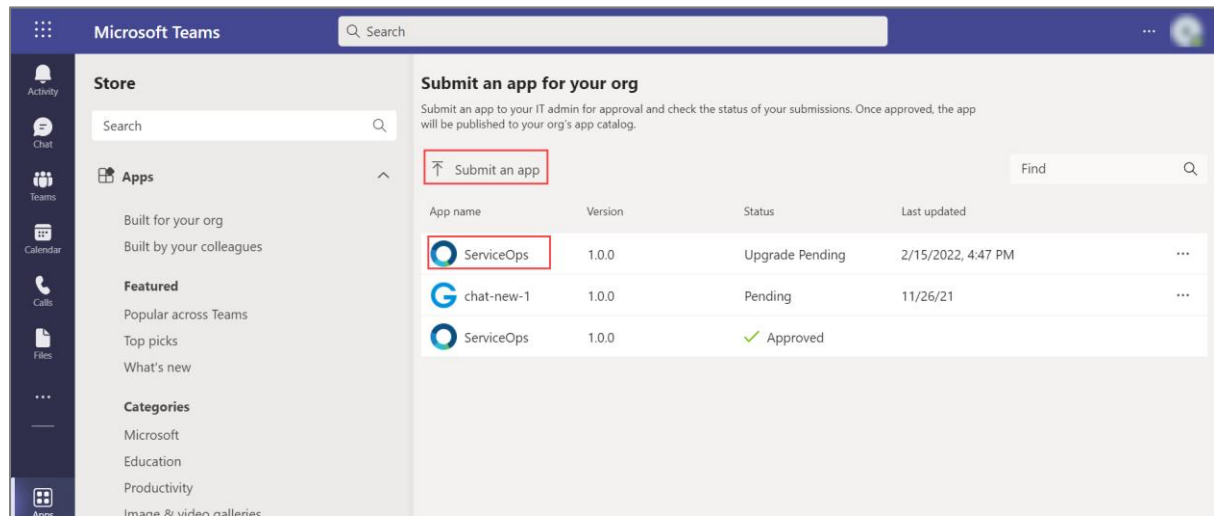

Fig 14: IT Admin's Approval Queue

Once the IT Admin approves, the app will be published and available in your Apps list.

Step 14: Sign-in to the ServiceOps Portal and configure the Teams App settings.

- Navigate to **Admin > Support Channel > Virtual Agent > Teams App Config** page.
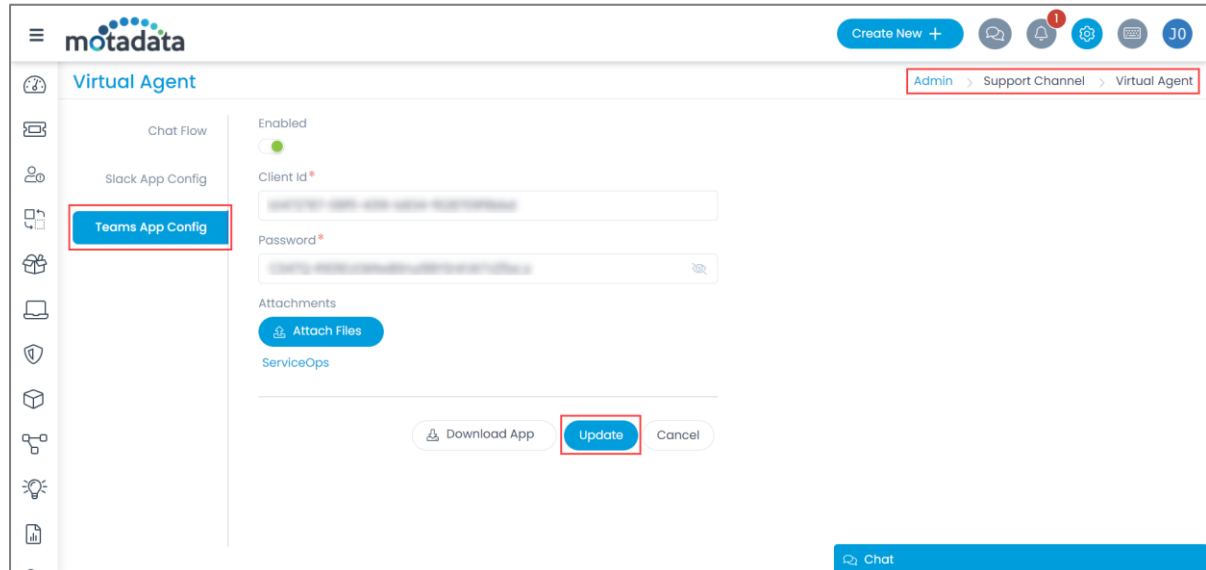

Fig 15: Teams App Config Page

- **Enable** the Teams functionality to allow requesters to chat via the Teams application.

- Provide the **Client ID** and **Password** of Teams. You can get these details from the Teams client page, as shown below.
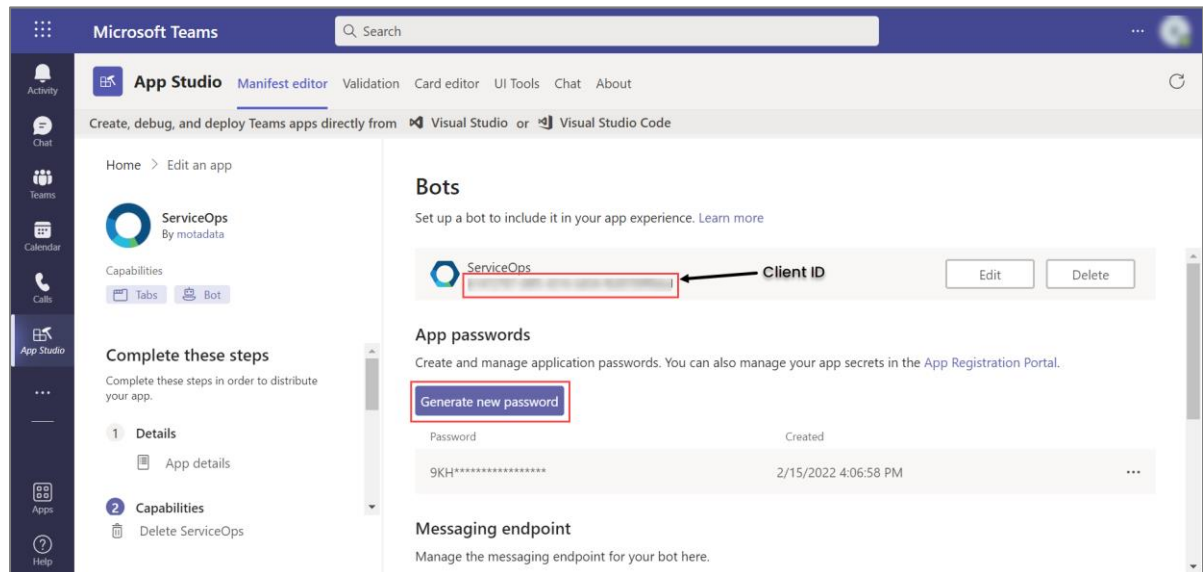

Fig 16: Client ID and Password

- **Attachments**: Attach the app zip file downloaded from the Teams application.
- Click **Update**, and a confirmation message will appear.

Step 15: Open the Teams application, select the app, and begin your conversation with the ServiceOps Virtual Agent.
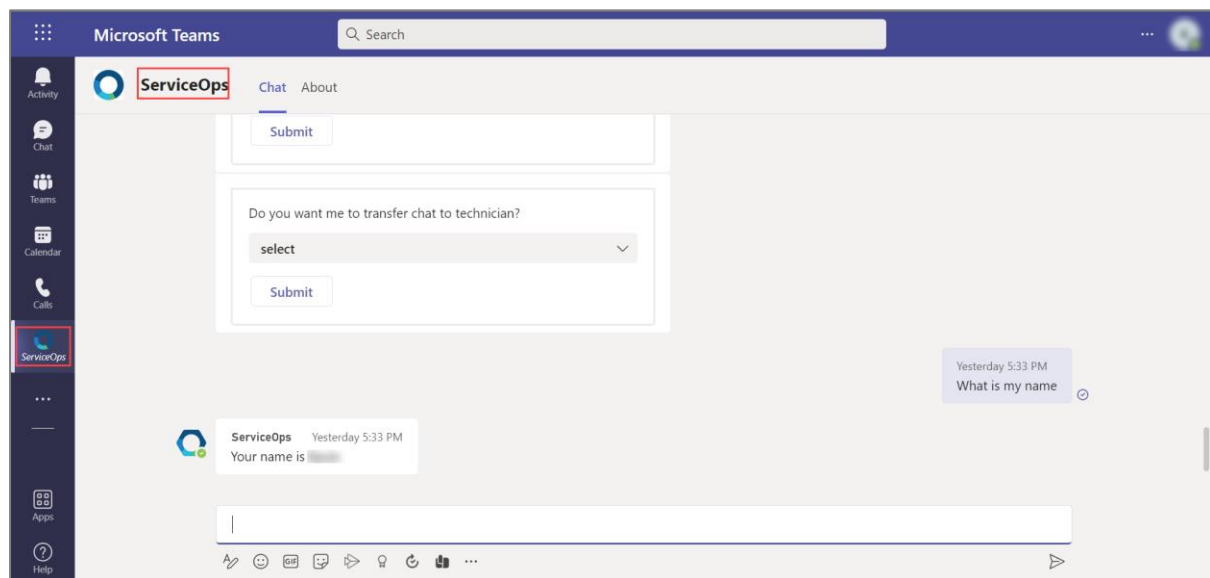

Fig 17: ServiceOps Virtual Agent in Microsoft Teams

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www.motadata.com

support@motadata.com