

kama DEI Version 2.5

Release Notes

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Image by senivpetro on Freepik

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Version 2.5 Release Notes

This release note covers the following features introduced into kama DEI:

1. Message of the Day
2. RPA and Lex Bot (chargeable, value-added feature)
3. Multiple Personas

Message of the Day

An improvement to the chatbot experience, Message of the Day (or MoD) is a clickable message within your chatbot that can direct users to timely information. The message can be set up within the “Portals” tab on Kama DEI and customized or changed depending on the needs of your organization. MoD can be used to highlight special events, sales, news releases and more.

Benefits to your Organization:

- Promote important or timely information
- Drive higher knowledge dissemination
- Increase awareness of promotions and drive higher business development or other stakeholder engagement

kama RPA - extension to third-party Bots

For questions that require information collection and some form of automation or calculation before they can deliver a result, this new feature leverages mapping to Robotic Process Automation (RPA) platforms with Bots for custom functions. When a phrase is entered that corresponds to a mapped inquiry, or a kama DEI Problem Knowledge Record (KR), a customizable prompt will ask the user if they want to proceed with an automated process. If the user clicks yes, then control is passed to the third-party Bot and the user will be asked for necessary input as defined within the Bot. The Bot will eventually deliver a result, and the user will be returned to kama DEI for any additional questions. For

further clarification, the user continues a seamless conversation with the kama DEI Virtual Agent while control passes from kama DEI, to the third-party Bot and back to kama DEI.

Benefits to your Organization:

- Automate repetitive functions
- Provide convenient, anytime self-service access for your users or clients
- Facilitate lead capture for sales, support other customer inquiry functions
- Drive operational efficiency inside your organization

Multiple Personas

This new feature allows a single organization to create multiple Personas, each containing its own unique set of KR or FAQs. These Personas can then deliver specific information for different audiences, accessible from different access media connected to associated Portals. For further clarification, each Portal—which can be of the same or different media type, like kama DEI chatbot, Messenger, or Alexa device—can have its own Persona with each Persona carrying a specific set of FAQ, all coming from the same Organization's Knowledge Base.

Benefits to your Organization:

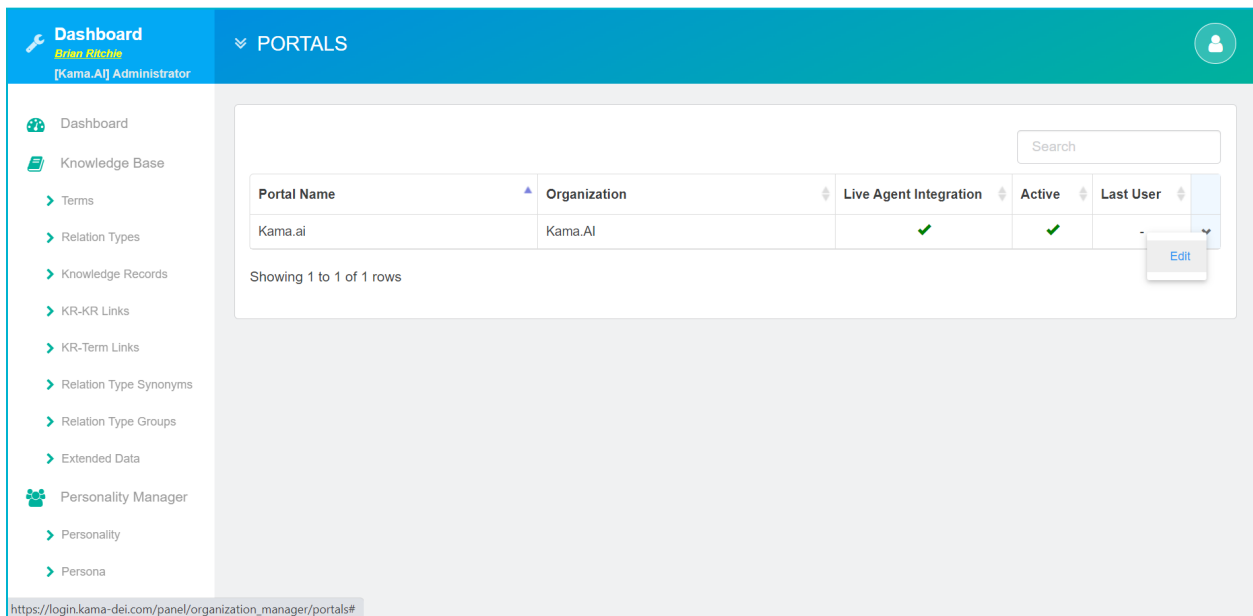
- Service different stakeholders with relevant information to meet their needs
- Drive operational efficiency inside your organization

The following pages further describe these three new features and their usage.

How to use: Message of the Day

As mentioned, the Message of the Day (or MoD) feature is used to highlight certain FAQ information that is available for the user in a specific Persona accessed through a specific Portal / Chatbot pair. While other kama DEI features may be used with various media endpoints like Messenger or Alexa smart speakers, the MoD feature requires certain interaction with the front-end access media, which is currently only supported with the kama DEI Chabot interface.

1. Under Organization Manager on the left-hand menu, go to Organization Manager and select Portals. On the Portal screen, use the right-hand menu pull-down and select “Edit”.



The screenshot shows the 'PORTALS' section of the Kama.ai Organization Manager. The left sidebar contains a navigation menu with options like Dashboard, Knowledge Base, Terms, Relation Types, Knowledge Records, KR-KR Links, KR-Term Links, Relation Type Synonyms, Relation Type Groups, Extended Data, Personality Manager, Personality, and Persona. The main content area displays a table of portals. The table has the following columns: Portal Name, Organization, Live Agent Integration, Active, and Last User. A single row is shown for 'Kama.ai'. An 'Edit' button is visible in a dropdown menu next to the Last User column.

Portal Name	Organization	Live Agent Integration	Active	Last User
Kama.ai	Kama.AI	✓	✓	

Showing 1 to 1 of 1 rows

2. You will then have this screen (below), and you can turn the MoD selector ‘On’.

Please Note: The MoD feature needs to be enabled for your organization. If you cannot turn the MoD feature on in your Portal, you may have to contact your kama DEI Account Manager to have them turn it on for your organization.

Portal Name

Kama.ai

Organization

Kama.AI

Description

Portal Code

1undefined

Webpage Integration Code

MoD

Off

Activate Portal

On

Live Agent Integration

On

MoD Notification Message

Click here for help.

MoD Sample Utterance

Chat skills

Cancel

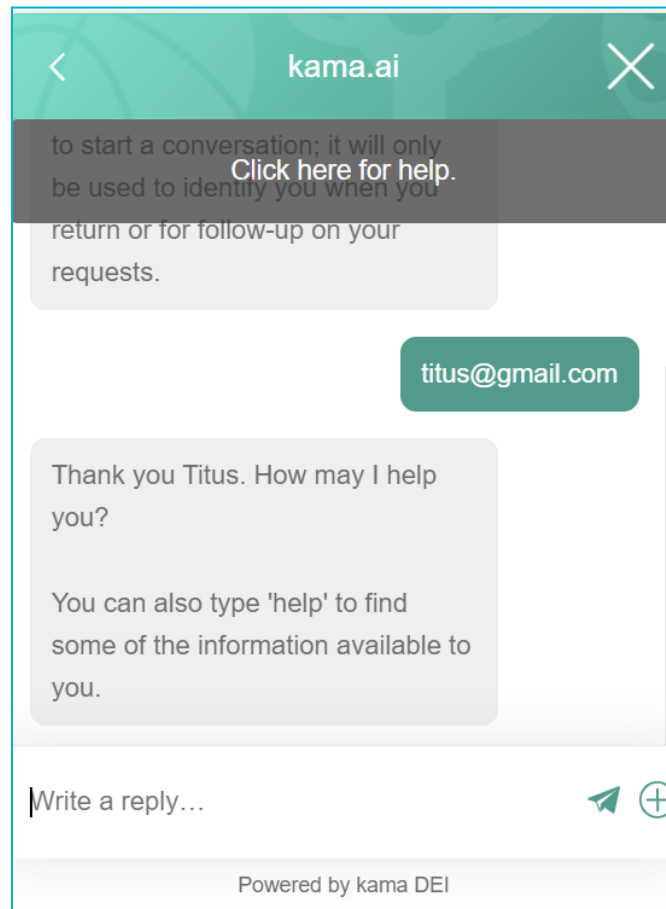
Save Item

3. Type in your preferred “message of the day” and fill out the “MoD” sample utterance.
4. On the same screen, you will see “MoD Notification Message”. This is what will be displayed in the MoD banner when users login into your chatbot. To be clear, if you have enabled email registration, the user will need to enter their email address, and after they do, the MoD banner will appear with the MoD Notification Message.

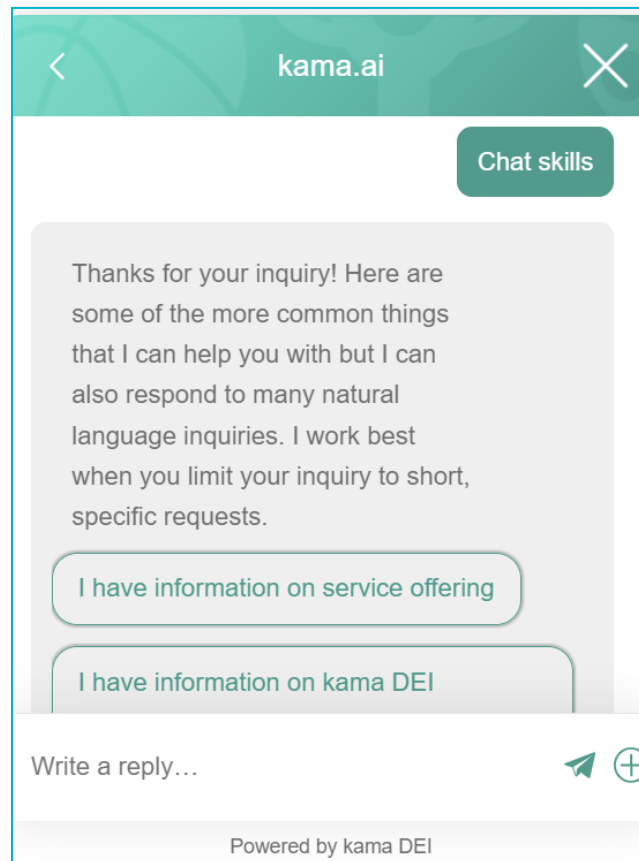
If users take no action to click on the MoD banner, it will disappear in a number of seconds. If they click on it, the MoD feature will send the “MoD Sample Utterance” to the kama DEI Controller.

5. The MoD Sample Utterance is text that effectively is typed into the chat automatically when the user clicks on the MoD banner while it is displayed. That means the MoD Sample Utterance must be something that will trigger an intended FAQ once the banner is clicked. That FAQ could be a

single particular FAQ that you want to notify users about and deliver the associated Extended Data, or it could be a FAQ linked to a list of other FAQs.



6. In the screenshot above, you can see the MoD banner displaying “Click here for help,” which is the MoD Notification Message entered previously in the Portal screen.
7. When the user clicks the MoD banner, you can see in the screenshot below that the chatbot has sent the text “chat skills” into the conversation. This text “chat skills” came from the MoD Sample Utterance configured in the Portal screen.



In this case, chat skills is a particular FAQ configured to give a list of helpful FAQs that the user may be interested in, like a chatbot helper. However, the MoD is not limited to the chatbot helper type FAQs, it can be featured specials that you have with an FAQ like “Person + can request information on + featured specials” or a new policy that you want to inform employees about like “Person + can request information on + vacation policy”.

Said in another way, the MoD feature is just a way of broadcasting or bringing attention to an existing FAQ, or FAQ set, that you have built previously, or you want to build for a particular promotion you are having. The actual information and conversation flow is nothing new; it is standard kama DEI FAQ programming. The message of the day is simply a means of advertising it to users through a banner with the MoD Notification Message as a description in the banner.

How to use: kama RPA for third-party Bots

As mentioned in the introduction, kama RPA for third-party Bots offers a way of extending conversations into conversational automation where kama DEI, combined with a third-party RPA Bot, is able to handle an automation function like an address change, a simple quotation, or a lead capture for customer call back.

In these cases, the conversation goes beyond handing out information for an FAQ; it involves getting and validating information from the user and then performing some function that can include updating another system like an HR or CRM system.

These third-party Bots are not actually core to kama DEI, but they are integrated into kama DEI conversations. These Bots can be developed by kama.ai, by kama DEI implementation partners, or they can be developed by your enterprise's IT group. Once developed, they are integrated into the kama DEI solution as described in the following steps.

1. Notify your kama DEI provider Account Manager to enable the RPA function. RPA is a chargeable, value-added feature of kama DEI. You can discuss this additional pricing with your Account Manager.

Organization Name

kamaCARE

Default Persona

Anishinaabe ▼

Organization Description (Optional)

Self Help service bureau

Billable

☒ On

RPA

☒ On

KaaS 3PB

☐ Off

Has Live Agent

☐ Off

Multi Language

☐ Off

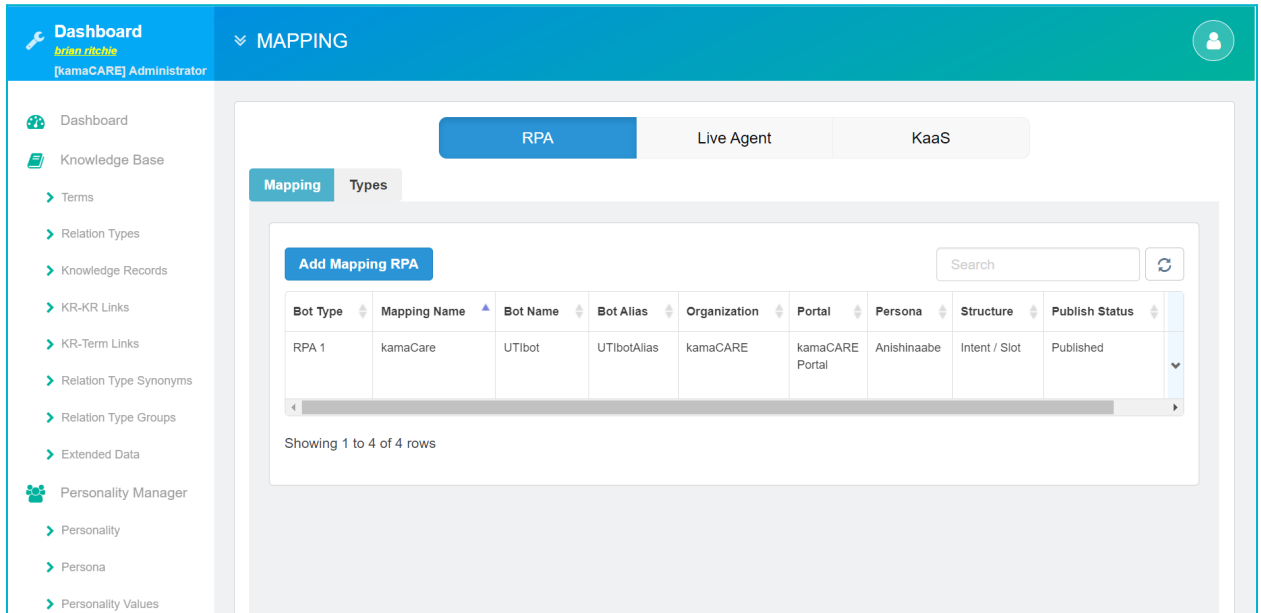
Message of the Day

☐ Off

Cancel

Save Item

- On the left-hand navigation menu, go to “Mapping” and click on “Add Mapping RPA”.



The screenshot shows the kama.ai Mapping interface. The left-hand navigation menu is visible, with the following items: Dashboard, Knowledge Base, Terms, Relation Types, Knowledge Records, KR-KR Links, KR-Term Links, Relation Type Synonyms, Relation Type Groups, Extended Data, Personality Manager, Personality, Persona, and Personality Values. The main content area is titled "MAPPING" and has tabs for "RPA", "Live Agent", and "KaaS". The "RPA" tab is selected. Below the tabs, there are sub-tabs for "Mapping" and "Types". The "Mapping" sub-tab is selected. A button labeled "Add Mapping RPA" is visible. Below the button is a table with the following columns: Bot Type, Mapping Name, Bot Name, Bot Alias, Organization, Portal, Persona, Structure, and Publish Status. The table contains one row of data:

Bot Type	Mapping Name	Bot Name	Bot Alias	Organization	Portal	Persona	Structure	Publish Status
RPA 1	kamaCare	UTibot	UTibotAlias	kamaCARE	kamaCARE Portal	Anishinaabe	Intent / Slot	Published

Below the table, it says "Showing 1 to 4 of 4 rows".

- This will bring you to the following menu:

Bot Type

RPA 1 (Lex) ▼

Mapping Name

Mapping Name

Bot Name

Bot Name

Bot Alias

Bot Alias

Organization

kamaCARE ▼

Portal

Select Portal ▼

Persona

Persona

Structure

Intent / Slot ▼

Cancel

Add Item

- For AWS Lex-type Bots, please select “RPA 1 (Lex)” (**Note:** For additional RPA platform Bot types, please consult your kama DEI provider as additional support may be required)
- Create a name for the RPA Bot in “Mapping Name”
- For “Bot Name” and “Bot Alias”, you will need to get this information from your Lex Bot developer as these are particular inputs that must match the information within the AWS Lex platform or another third-party Bot RPA platform
- For “Portal” please select the kama DEI Portal that you wish to use enable with this RPA Bot function
- For “Structure” please select “intent and slot”

4. Once saved using “Add Item” your Mapping will look something like the following:

Bot Type	Mapping Name	Bot Name	Bot Alias	Organization	Portal	Persona	Structure	Publish Statu
RPA 1	kamaCare	UTibot	UTibotAlias	kamaCARE	kamaCARE Portal	Anishinaabe	Intent / Slot	Published

5. Go to the far right and click on the tab to open up the menu. Click on “edit”.

Bot Type	Mapping Name	Bot Name	Bot Alias	Organization	Portal	Persona	Structure	Publish Status
RPA 1	kamaCare	UTibot	UTibotAlias	kamaCARE	kamaCARE Portal	Anishinaabe	Intent / Slot	Published

[Edit](#)

6. When you arrive at this page, click on “New Row”

MAPPING

Mapping Name: test
Bot Name: utibot
Bot Alias: utialias
Organization: kamaCARE RPA 1 Integration is Active
Persona: Anishinaabe
Portal: kamaCARE Portal RPA 1 Integration is Active

Mapping

Kama-DEI Knowledge Records

New Row

7. Click on “Select KR”

Bot Name: utibot
Bot Alias: utialias
Organization: kamaCARE RPA 1 Integration is Active
Persona: Anishinaabe
Portal: kamaCARE Portal RPA 1 Integration is Active

Mapping

Kama-DEI Knowledge Records

Knowledge Record	Sample Utterance	Pre-handoff Message
<input type="text"/> Select KR	<input type="text"/>	English

New Row

- The following screen will appear. Search for the KR that relates to the Problem KR you wish to associate with your RPA Bot function, select that KR by clicking on it and then press “Select”.

Link Knowledge Records

person can request information on UTI

Cancel

Select

person can request informati

↺

Knowledge Record	Ownership	Owner
person can request information on UTI	Private	kamaCARE

Showing 1 to 1 of 1 rows

- Fill out “Sample Utterance”. This is a phrase that should also come from your third-party Bot developer, which is known to trigger the process in the third-party Bot platform for this particular function. Note that one Bot could have several functions, each of which is initiated by a different trigger phrase or Sample Utterance.

Mapping

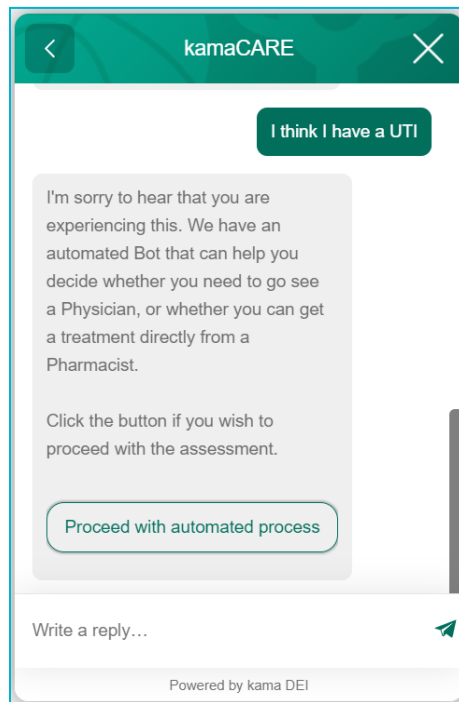
Kama-DEI Knowledge Records

Knowledge Record	Sample Utterance	Pre-handoff Message
<div>person can request information on UTI</div> <div>Select KR</div>	<div>I'd like to do a UTI ass</div> <div></div>	<div>English</div> <div>I'm sorry to hear that you are experiencing this. We have an automated Bot that can help you decide whether you need to go see a Physician</div>

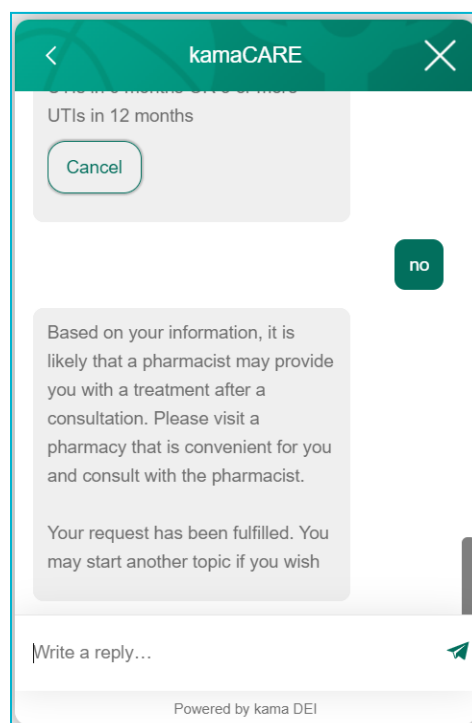
New Row

10. While using a kama DEI Virtual Assistant that has a Persona containing this kama DEI Problem KR and the user enters an issue related to this Problem KR, the kama DEI controller will detect the problem, recognize that a third-party Bot is available and offer the user the opportunity to start the automated conversational process. The first step in that process is to pass the Sample Utterance phrase (see the above screenshot) to the third-party Bot, which will appropriately trigger the bot to begin its automated process.
11. Also in the screenshot above, there is a “Pre-handoff Message”. This is an opportunity for you to introduce the process and start with an appropriate empathetic response to the detected problem. In the conversation flow, once the Problem KR is caught based on a user's inquiry, the Pre-handoff Message will be displayed to introduce the automated process along with a button to begin the process.

Please note that this button “Proceed with automated process” is a kama DEI Org Messages configurable back-end message and it can be changed for your organization.



Once the user selects the automated process, they will be placed in the conversational control of the third-party Bot. The process will continue until the Bot has collected all the information it needs and completes its function. After that, the Virtual Assistant will respond with the Back End Message like *“Your request has been fulfilled. You may start another topic if you wish”* (this is an Org Messages configurable message, so it may be somewhat different).



Information about how to develop a third-party Bot in any particular RPA platform is beyond the scope of kama DEI and should be discussed with your IT staff, systems integrator or solution provider.

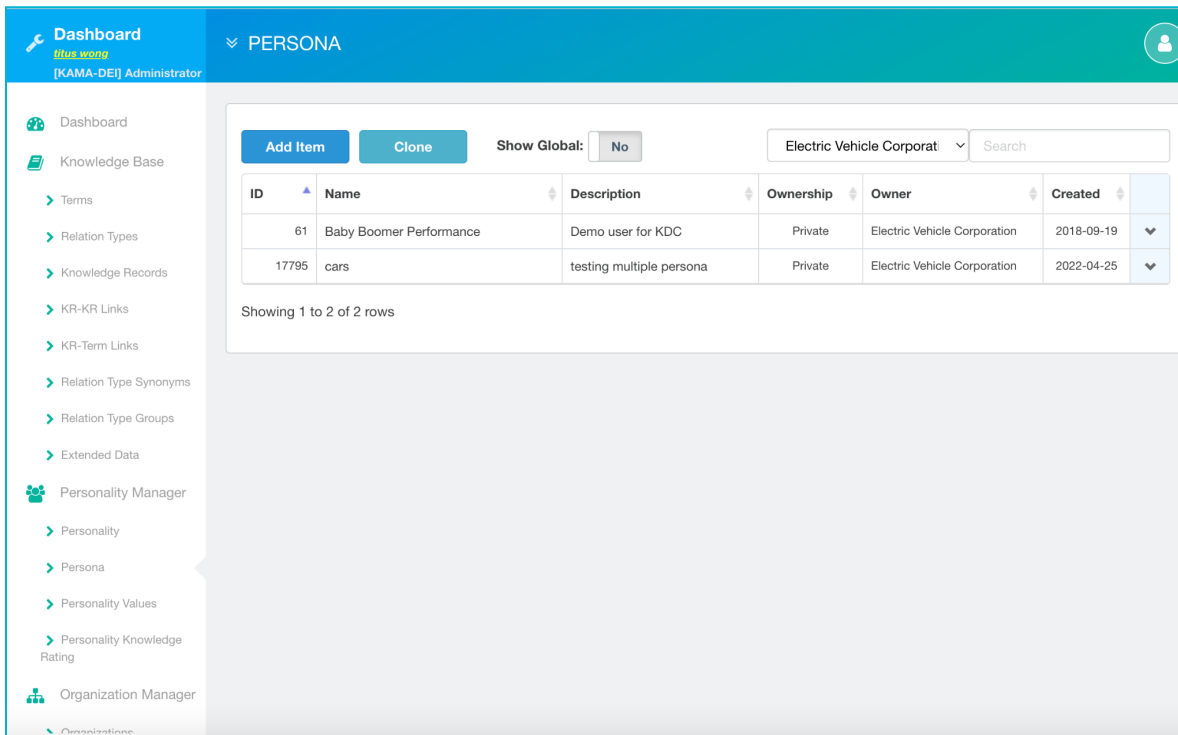
How to use: Multiple Personas

Personas in kama DEI are the way you can curate particular sets of information that are designed for a particular audience such as external clientele, internal employees or a group of business partners. In this case, you could have three Personas, each developed for these different audiences.

The next assumption is that each of these Personas will be accessible from a separate chatbot, or another Virtual Assistant medium like Messenger. Please note that all three audiences could be served through the same media type, such as a kama DEI chatbot, but these would be three different Portal chatbots of the same type.

If you need to create a new Persona for your new Portal, the steps for creating a Persona are not covered in this bulletin.

1. Go to “Persona” and click on “Add Item”. In this case, we wish to add a new Persona that will be used as an Employee Virtual Assistant



The screenshot shows the 'PERSONA' management interface in kama.ai. The left sidebar contains navigation links: Dashboard, Knowledge Base, Terms, Relation Types, Knowledge Records, KR-KR Links, KR-Term Links, Relation Type Synonyms, Relation Type Groups, Extended Data, Personality Manager, and Organization Manager. The main content area has a header with 'PERSONA' and a user profile icon. Below the header, there are buttons for 'Add Item' and 'Clone', a 'Show Global' toggle set to 'No', a dropdown menu for 'Electric Vehicle Corporat', and a search bar. A table lists two personas:

ID	Name	Description	Ownership	Owner	Created	
61	Baby Boomer Performance	Demo user for KDC	Private	Electric Vehicle Corporation	2018-09-19	▼
17795	cars	testing multiple persona	Private	Electric Vehicle Corporation	2022-04-25	▼

Showing 1 to 2 of 2 rows

- Fill out the information for the new Persona to be used with the new Portal as indicated below (but for your own situation).

Name

Description

Ownership

As an alternative, you can also start by “Cloning” an existing Persona from the Persona screen. Go to the Personality Knowledge Rating screen to delete and add KRs as required for the new Persona.

In this example, we are adding a new Employee Virtual Assistant called “EVC Employee” that will carry significantly different information than the consumer-facing Persona, “Baby Boomer Performance” in this example. Having said that, all of the information for both Personas come from the same Organization Knowledge Base maintained by your enterprise.

All of this is the standard process for creating a kama DEI Persona, in the same way that your first Persona was developed.

- Next, go to “Personality Knowledge Rating”, select your new Persona, and add any KRs you like for your new audience and respective Portal.

PERSONALITY KNOWLEDGE RATING

Owner

☒ Persona
☐ Personality

Persona

Records: 2

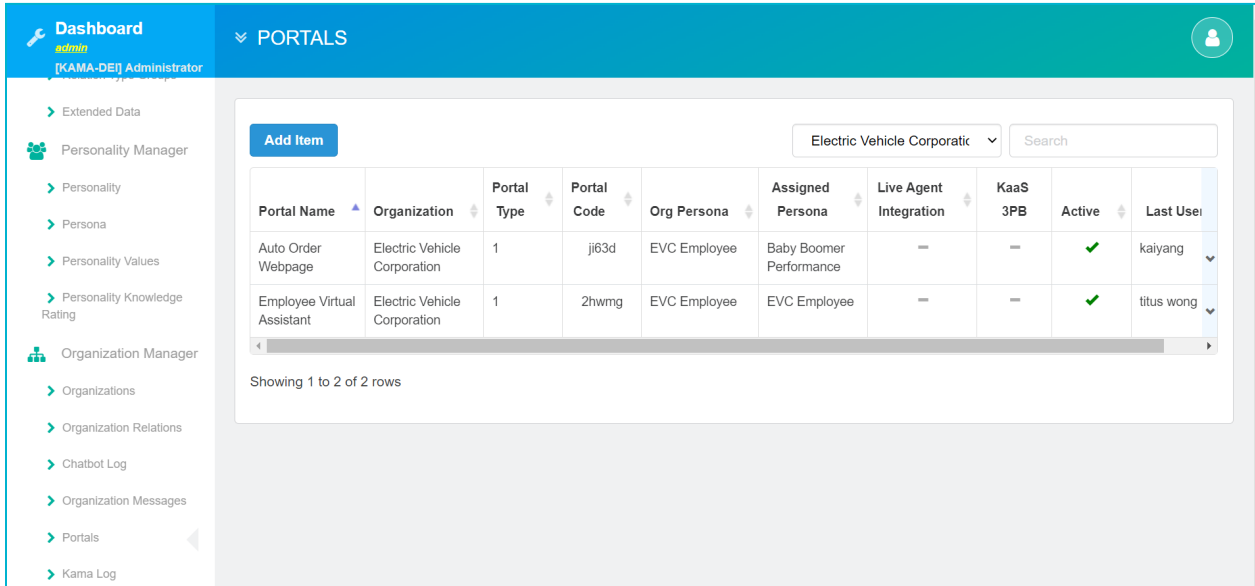
Values for **EVC Employee**

Add Knowledge Records
Copy KRs

Show All ☒ Solution ☐ Problem ☐

	<input type="checkbox"/> Knowledge Record	Created	Net Rating	Personalized
+	<input type="checkbox"/> I have information on environmental action plan	2023-05-18 16:22:48	solution	<input type="button" value="down"/>
+	<input type="checkbox"/> person can request information on environmental action plan	2023-05-18 16:20:26	problem	<input type="button" value="down"/>

- Then go to “Portals” under Organization in the left-hand navigation menu. There, you will see your original Portal and your new Portal (Employee Virtual Assistant in this case).



Dashboard
admin
[KAMA-DEI] Administrator

▼ PORTALS

Add Item Electric Vehicle Corporation Search

Portal Name	Organization	Portal Type	Portal Code	Org Persona	Assigned Persona	Live Agent Integration	KaaS 3PB	Active	Last User
Auto Order Webpage	Electric Vehicle Corporation	1	ji63d	EVC Employee	Baby Boomer Performance	—	—	✓	kalyang
Employee Virtual Assistant	Electric Vehicle Corporation	1	2hwmg	EVC Employee	EVC Employee	—	—	✓	titus wong

Showing 1 to 2 of 2 rows

- Select “Edit” from the right-hand smart menu pull-down for your new Portal and you will see an edit screen as shown below. In this case, note that we have already selected the new Person for this new Portal “Employee Virtual Assistant”.

Portal Name

Employee Virtual Assistant

Organization

Electric Vehicle Corporation

Description

An employee-facing Virtual Assistant that is accessed from our Intranet pages.

Portal Type

Webpage

Assigned Persona

EVC Employee

Portal Code

12hwmg

Webpage Integration Code

MoD

On

Activate Portal

On

MoD Notification Message

Click here to help get yourself started !

MoD Sample Utterance

chat skills

Cancel

Save Item

6. Press “Save Item” to save the new Portal with its new Persona.
7. Once this is saved, you can now have your new Portal installed on your website or other front-end media like Messenger or Alexa smart speaker.

Please note that the installation of the Portal to a media endpoint such as a chatbot is outside the scope of the work done by a kama DEI Administrator or Knowledge Manager. Please consult your solution provider, systems integrator or kama.ai on the installation of a new chatbot or other media endpoint for kama DEI.

About kama.ai and the kama DEI Solution

kama.ai is the creator of the Designed Experiential Intelligence™ platform, kama DEI, that allows curated information to be rated and distributed through a conversational agent based on personality value profiles. This establishes a level of personalization between the consumer and an enterprise’s information that has not been achieved previously. The result is an automated Virtual Assistant that works around the clock to address inquiries with the right information for the right reasons.

kama DEI has an underlying knowledge base that unifies common information and an Enterprise Portal through which non-technical users can curate and rate product and service information in simple natural language methods. The platform also allows for the setup of various target market demographic profiles (kama DEI Personas) to form the basis for various consumer or employee personality types.

kama.ai also offers a rapid-launch, front-end chatbot that can be configured and integrated within hours to your enterprise’s web and mobile web pages. As an alternative, the kama DEI Chatbot API allows integration to a current chat facility that you may already be using for live chat, and it can also power other channels such as Messenger, SMS text or WhatsApp.

For more information on kama DEI, please chat with “Kady” on our website at kama.ai or fill out an [inquiry form](#) on our site.