

MyWave Technical Document

A GUIDE FOR USERS OF THE MYWAVE PLATFORM | JANUARY 2024

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Document Details

Document Control

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Purpose

This document is a user-friendly guide for MyWave platform users. It explains the tasks and fields used by SysAdmins, Developers, and Wave Creators. The goal is to help users easily navigate and understand the platform. By offering clear instructions on key features, it empowers users to make the most of MyWave for effective Wave process creation and deployment.

Target Audience

This document is tailored for partners/individuals involved in the use and administration of the MyWave platform.

MyWave Introduction

MyWave is a Generative AI driven conversational Co-Pilot for employees and end customers.

It enables any business process to be transformed by generating and automating digital processes for customers, employees, and assets.

It can remove administrative burdens, improve system usability, and help customers and employees to achieve their goals.

MyWave adapts processes in real-time based on context, intent, business, personal and machine data for each individual user.

Key Links

MyWave Innovation Hub: <u>https://innovation-hub.training.app.mywave.me/</u> MyWave Website: <u>MyWave.ai – Generative AI for business</u>

Further Assistance

For further assistance, email: support@mywavesupport.zendesk.com

Roles

There are three primary roles for administering the MyWave platform. A user can have multiple roles assigned:

| Role | Tasks |
|----------------|---|
| SysAdmin | Create and edit organisationsAdd and manage users. |
| Wave Developer | Add and customise InfoPluginsDistribute software. |
| Wave Master | Create user journeys (Wave processes). |

Overview

The process for setting up the MyWave platform for end users is summarised as:



Create organisation and set up users

Users with the SysAdmin role can create or edit organisations and add or edit users.

Organisations are the highest-level entities encompassing workspaces and their respective Waves.

Organisation

Create a new organisation

- 1. Click ... next to User Settings on the left-hand sidebar.
- 2. Select Organisations
- 3. Select Create New Organisation.
- 4. Enter the name of the organisation.
- 5. Click **Save**.

Change the name of an organisation

- 1. Click ... next to User Settings on the left-hand sidebar.
- 2. Select Organisations.
- 3. Click the edit icon next to the organisation you wish to rename.
- 4. Update the name of the organisation and click the **tick**.

Change selected organisation

- 1. Click ... next to User Settings on the left-hand sidebar.
- 2. Select Organisations.
- 3. Click on the organisation name you wish to change to.
- 4. Click Yes.

Users

Users with the SysAdmin role can add and manage users in an organisation. Users can be members of multiple organisations.

Add a user to an organisation

- 1. Click ... next to your organisation name on the left-hand sidebar.
- 2. Select Users.
- 3. Click Add User.
- 4. Enter the user's email address and select the roles to be assigned for the organisation.
- 5. Click Save.

Edit the roles of a user

- 1. Click ... next to your organisation name on the left-hand sidebar.
- 2. Select Users.
- 3. Select the user to edit.
- 4. Select or deselect the roles to be assigned to the user for the organisation.
- 5. Click Save.

Remove a user

- 1. Click ... next to your organisation name on the left-hand sidebar.
- 2. Select Users.
- Click the Delete icon of the user to remove.
 Note: You cannot remove yourself from an organisation.
- 4. Click Yes, delete to confirm.

Software Distribution

As a developer, you can build your own custom solutions using the MyWave SDK. Instructions on how to install the SDK into your development environment are available from the **Software Distribution** section.

Construct Process Waves

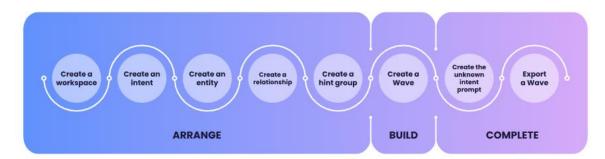
Users with the Wave Master role can create or edit configured Waves.

The process of creating a Wave consists of three stages:

Arrange is the first stage where you set up the key elements required to get started.

Build is the core stage where you create the Wave for your customer.

Complete is the final stage where you perform the last steps and export the Wave, so your customers can start using it.



There are several object types to set up and configure:

| Object type | Purpose |
|-------------|---|
| Workspace | Encompasses all elements to include in a deployment. An organisation can have multiple workspaces. |
| Intent | An intent is the purpose or outcome of a Wave, e.g. create a sales order. |
| Entity | An entity is an object that the platform remembers and can refer to during Waves. There is always a Person entity that stores information about the current user, e.g. name, etc. |

| Relationship | A relationship is a way to connect entities together. For example, the Person entity could have a 'Someone I know' option and the user will be prompted to enter their name, making it available for future use. |
|--------------|--|
| Hint | A hint is a prompt text that displays on the platform so the user knows the types of questions or actions they can perform. |
| Category | Categories allow you to customise your Waves based on certain criteria. For example, a 'Clothing' category for 'item' can contain jeans, shoes, etc. Categories can also be used to help the platform recognise similar items, e.g. a 'TV' category could contain similar words such as television. |
| Wave Model | A Wave Model is a journey, starting with an intent triggered by the user or other system. It uses intents, entities, and relationships to identify and request information from the user or system so that the platform can execute that action. |

Workspaces

Create a new workspace

- 1. Select **Workspace Library** from the left-hand menu.
- 2. Click Create New Workspace.
- 3. Enter the workspace name and click **Save**.

To change a workspace name, click the Edit icon of the workspace and update the name.

Intents

An intent refers to the purpose or desired outcome of a Wave process, such as creating a sales order or adding a timesheet item.

There are two methods to trigger Intents in the Innovation Hub:

- 1. Using a Large Language Model (LLM)
- 2. Using Natural Language Processing (NLP)

Both methods are configured in the same way within the Innovation Hub; however, LLM deployments require significantly less training data. For instructions on linking your LLM to the Waves, please refer to the Deployment documentation.

For more detailed insights into the differences between NLPs and LLMs in the context of this product, please consult: <u>NLP vs LLM</u>.

| WAVE trigger: | | لگ ا |
|---------------------------------|------------------|----------------|
| Create a production order for 1 | 00 green jackets | |
| CREATE + A + | | REEN + JACKETS |
| ttributes: | | |
| | Meaning | |
| Phrase | Weaning | |
| Phrase production order | order | ŵ |
| production order | - | Ū Ū |
| | order | |

Create an intent structure

To create an intent:

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **Intents** tab.
- 3. Click Add Intent.
- 4. Enter the intent name and click **Save**.

Note: if you are using LLM, you do not need to enter a WAVE trigger, so can stop at this step.

- 5. Enter a **Wave Trigger**, the sentence the platform looks for to recognise the intent. For example: 'I want to buy a green jacket'.
- 6. Select the key words in the entered sentence to set as identified attributes and enter the meaning. For example:
 - Green = Colour
 - Jacket = Item.
- Click Add Trigger to add an additional trigger for this intent and repeat steps 6 and 7.
 For example: 'I want to buy a large green jacket'.
 Note: Words in the Wave process trigger can be combined to create a single phrase by clicking the plus icon.

For LLM-triggered implementations, only basic intents and categories are required. The LLM configuration file will be generated during deployment.

Create the unknown intent prompt

The unknown intent prompt displays to the user if they enter something that the platform cannot understand. Intents can be added to guide the user in the right direction from this output. Multiple intents can be added, and the user will be able to select what it is they were trying to do.

To create the unknown intent prompt:

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select Workspace Library.
- 3. Click Export.

Result: Dialog displays, stating that the Unknown Intent <u>Conversation</u> has not been configured.

- 4. Click Yes.
- 5. Complete the following fields and click **Save**:

| Field | Description | Example |
|-----------------------------|---|--|
| Unknown Intent Prompt | The text presented to the user when they input something the platform doesn't understand. | I'm sorry, I didn't quite get that. Here's what I can help you with right now: |
| Description | The text presented to the user as an option for what to do next. | Buy a product |
| Intent | The intent linked with this option. | Product Purchase |
| Attribute | The attribute of the category linked with this option. | Item |
| Prompt | An optional field that serves as a prompt for instances where multiple Waves share the | What do you want to buy? |



same intent. The user's response to this prompt informs the system about which specific Wave process it should use. Possible answers could include 'a jacket', initiating the clothing Wave process, or 'a TV', triggering the electronics Wave process.

Note: To edit an existing unknown intent prompt, select **Waves**, then choose the **Unknown intent** Wave.

Entities

| Name | Entity Types / Edit Entity Type | | |
|----------------|---------------------------------|----------------|-------------------------------|
| COMPLETED_WORK | textFieldKey | | |
| Save | | | |
| Save | Prompt | | |
| | | | |
| | | | ↔ Configure Alternate Prompts |
| | # Time | | × |
| | # Company | | × |
| | Date | | × |
| | | ⊕Add Attribute | |
| | | | |
| | | | |
| | Company | ⊕Add Attribute | × |

An entity is an object that the platform remembers and can refer to during Wave process execution. There is always a Person entity that stores information about the current user, e.g. name, etc.

Create a new entity

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **Entities** tab.
- 3. Click Add Entity.
- 4. Complete the following fields and click **Save**:

| Field | Description | Example |
|--------------|---|---|
| Name | The display name of the entity. | Client |
| textFieldKey | The internal name of the entity. | Client |
| Prompt | The question asked to the user to initiate the entity creation. | Sure, I can help you with that. May I please have the client's name? |

5. Click **Configure Alternate Prompts** to add additional prompt questions for the entity.

Entities have one or more attributes that store types of information about that entity. For example, the Person entity can have name, size, and gender attributes.

Add an attribute to an entity

- 1. From the Edit Entity Type screen, click Add Attribute.
- 2. Complete the following fields and click **Save**:

| Field | Description | Example |
|--------------------------|---|--|
| Name | The attribute name. | Size |
| Label | The display name of the attribute. | Size |
| Requires Confirmation | If true, a designer can ask the user to confirm the value in a consent interaction. If false, it won't appear in user consent interactions. | True |
| Can Delete | If true, users can remove the entered value. If set to false, the platform won't allow deletion of this attribute's value from the entity. For instance, if a date of birth is set to not be deleted, it can't be removed once it's set. | True |
| Data Type | The type of the saved value. | String, Multiple Strings, Integer, Boolean |
| Options | Options available for the user to select from. Note: The first attribute in an entity cannot have options. | Small, Medium, Large |

Relationships

| elationships / Edit Relationship | | | |
|----------------------------------|------|--|--|
| ame | | | |
| someone_i_know | | | |
| ntity Type * | | | |
| PERSON | | | |
| int | | | |
| Someone I know | | | |
| | C | | |
| | Save | | |

This is where you can set up methods to fill in entities. For instance, the PERSON entity could have a 'Someone I know' option. If this is selected, the user would be prompted for person's name and create a new entity for that individual, making it available for future use.

Create a new relationship

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **Relationships** tab.
- 3. Click Add Relationship.
- 4. Complete the following fields and click **Save**:

| Field | Description | Example |
|-------------|--|--------------------------------------|
| Name | The name of the relationship. Note: Do not use spaces. | someone_i_know |
| Entity Type | The type of entity the value is added to. | PERSON |
| Hint | The prompt text displayed to the user. | Add the name of the person you know. |

Hints

| Hint | Hint Groups / Edit Hint Group | | | | |
|-------------------|--|---|--|--|--|
| Hint | Group | | | | |
| SAF | 3 | | | | |
| Samp | ble Triggers | | | | |
| * * * * * * | I need to fetch invoices from my email and import them to Business One | ۵ | | | |
| ** | Show me the open invoices for MyWave from this month | ۵ | | | |
| ** ** ** | Show me my sales forcast | ۵ | | | |
| ** | Check my pending approvals | ۵ | | | |
| ** | Create a sales order for Almika for 3 pieces of product ABC with standard discount | ۵ | | | |
| * * * * * * | Create a sales order | ۵ | | | |
| * * * * * * | | | | | |
| | Save | | | | |
| | | | | | |

Hints are the 'suggestions' or options available to users when they access the MyWave User Interface. They serve as quick buttons that users can utilise to complete commonly accessed tasks.

Hints can be autogenerated by clicking **Autogenerate Hints**. This takes the first trigger from each of the defined intents.

Create a Hint Group

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **Hints** tab.
- 3. Click Add Hint Group.
- 4. Complete the following fields and click **Save**:

| Field | Description | Example |
|-----------------|---|-------------------------|
| Hint Group | The category for grouping hints together. | Product Purchase |
| Sample Triggers | The example triggers to display. | I want to buy a jacket. |

Categories

| Categories / Edit Category | |
|----------------------------|----------|
| Category | |
| Time | |
| Attribute | |
| Time | |
| in this category: | |
| minutes | 迎 |
| hours | b |
| days | <u>ل</u> |
| | |
| | |
| Save | |
| | |

Create a new category

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **Categories** tab.
- 3. Click Create Category.
- 4. Complete the following fields and click **Save**:

| Field | Description | Example |
|------------------|---|--------------------|
| Category | The category name. | Clothing |
| Attribute | The intent attribute associated with this category. | Item |
| In this category | The words within the category. | Hat, scarf, jacket |

Wave Models

| Name Intent | Set Item master data to inac Deactivate Items | | Prompt: | Please select the items you want to make inactive | |
|----------------|--|----------|---------|---|---|
| Category | Generic Save | | Prompt: | Here are the items I will make inactive: <flist as="" user="" users=""> \$(user) <#sep>, <!--#list--> <#list replies.items as ans> \${ans!*Nothing <!--#list--> > Do you want to proceed?</flist> |) |
| Drag and D | rop Items into WAVE Flow: | ын ЯК | | WHEN: S(replies.make_inactive) * | |
| | INTERACTION | | | | |
| | WHEN | | | Prompt: The items have successfully been made inactive | |
| | WHILE | | | | |
| | DOWHILE | | Prompt: | Ok, we're done then | |
| | UNTIL | | | | |
| | DOUNTIL | | | | |
| | | | | | |

A Wave is the journey for a selected Intent. It comprises one or more items, each representing a different prompt type. These items engage with the user, gathering information to fulfil a specific intent.

All Waves should start with a Pre-Filled My Cloud interaction, with an entity type of PERSON, to ask the person their name. This enables specific customisation for each individual user.

Create a Wave process

- 1. Select your **Workspace** from the left-hand menu.
- 2. Select the **WAVEs** tab.
- 3. Click Create New Wave.
- 4. Complete the following fields:

| Field | Description | Example |
|----------|---|---------------------------|
| Name | The name of the Wave | Show sales forecast |
| Intent | The intent associated with the conservation. | Display Sales Information |
| Category | The category associated with the Wave (if using NLP). | Sales Forecasts |

- 5. Click the **Add an Item** icon and select **INTERACTION**. (after selecting your first item, you can drag and drop to add additional ones.
- 6. Select Pre-Fill My Cloud for the Interaction Type and ensure the Entity Type is PERSON.
- 7. Click Save.
- 8. Add additional items to the Wave process Model by clicking the **Add an Item** icon and selecting the relevant item type, see below.
- Repeat step 8 for additional items.
 Hint: Click the Wave process name above the form to return to the list of items.
- 10. Click Save.

Interaction items

The Interaction item is the most used prompt type, used for engaging with users by asking questions or prompts to obtain responses. For example: 'What would you like to purchase?'

There are several interaction types, each with their own properties and behaviours.

Prompts

Prompts in interaction types serve as questions to ask the user. All interaction types, except Pre-Filled My Cloud, have a prompt.

Variables

In prompts, you can incorporate previously obtained information using variables.

\${replies.variable_name} is used to access information already provided by the user within the Wave process. For example, if you had asked them for a size, it could be \${replies.size}.

\${intentAttribute.variable_name} is used to access information within an intent associated with the Wave process. For instance, if you had asked them what they wanted to buy, and they chose a 'Jacket', \${intentAttribute.item} would be 'jacket'.

For example: 'Hi \${replies.user_name}, who do you want to buy the \${intentAttribute.item} for?'. Where:

- \${replies.user_name} is the user's name entered earlier in the Wave process (where the Pre-Filled My Cloud interaction type has been used with the PERSON entity)
- \${intentAttribute.item} is the identified attribute from the intent, e.g. 'I want to buy a jacket'.

You can also use {response.attribute} to access variables stored within an InfoPlugin.

Alternate prompts can be configured to introduce more variation in the prompts presented to the user. If provided, the system will randomly select one of the alternative prompts, enhancing the natural flow of the Wave Execution —especially beneficial when a user engages in similar Waves multiple times. Each alternate prompt should only differ in language; the intent of the prompt should remain consistent. For example, you might have "Hi, what is your name?" and "Hi, can you provide me with your name?".

Interaction types

There are seven interaction types available for different situations.

All interaction types are associated with a mood value, serving as an indicator to the frontend. This mood value can be used to customise the display, such as modifying the font color, for each interaction type based on its mood. The default value is "Calm," and additional setup is necessary on the front end to incorporate extra moods.

Pre-Filled My Cloud

The Pre-Filled My Cloud interaction type retrieves stored information from the user's MyWave. If the information has not been previously entered, the selected entity's prompt displays. For example: 'What is your name?'

Present

This interaction type is used to gather and store data within an entity for future <u>Wave process</u> items. For example, it can be utilised to inquire about the size of a jacket a user wants to purchase, with the platform recording this information against the currently selected entity option.

| Field | Description | Example |
|--------------------------------|---|--|
| Field | The name of the field. | applicant_name |
| Field Type | The input type of the field. | Text, Multiple choice, email, etc. |
| Label | The label visible to the user on the front- end. | Applicant name |
| Hint | The placeholder text the user sees. | Enter the applicant's name |
| Optional | Whether the field is required or not. Note: Only relevant if the interaction involves multiple fields. | True |
| | · | - |
| Number of Fractional Digits | The number of decimal places to display. Note: Currency and Number field types only. | 2 |
| Default Value Expression | A dynamic way of setting the default value. | todays dates or \${replies.user_name} |
| Default Value | The default value for the field. Note: Currency and Number fields display Default Number Value. Does not display for Multiple Choice. | 100 |

The present interaction type requires at least one field.

| Min and Max Value | The minimum and maximum values possible. Note: Currency, Date and Number field types only (Date displays Min/Max Days) | 0, 100 |
|-----------------------------|--|--|
| Validation Error Message | This error message appears if the user has not entered a value in a required field, or if the entry doesn't meet the field's criteria. Note: Not on Lookup or Multiple Choice fields. | Please enter an applicant's name to proceed. |
| Owner Entity | This refers to the specific option within the entity where the information will be recorded. If the platform is unaware, it will prompt the user. | person_to_buy_for |
| Pre Filled With | This indicates the item within the selected entity option that pre-fills this field if available. | Size |
| Application Strategy | Follow Cloud Definition: Utilises the setting selected under the entity item. Confirm Required: The chosen value will be displayed in any relevant user consent interactions, allowing the user to modify it through that interaction. Confirm Not Required: Skips this field if there is a pre-filled value. This also overrides the Confirm Required setting on the attribute in the entity definition. Force User Input: Presents an entry field, even if the user has previously entered a value on a prior date. If a value has been previously selected, it will populate this field, providing the option to make changes. | Confirm Required |

Text field type specific fields

| Field | Description | Example |
|---------------|---|---|
| Is Multi-Line | Is the text field a multi-line input field. | False |
| Case | This serves as an indicator for the front-end, specifying the case in which the input should be provided. | No Case Required |
| Restriction | A regular expression used to instruct and validate a user's input. | Check for credit card number: r'^\d{16}\$' |

Multiple Choice field type specific fields

| Field | Description | Example |
|---|---|------------------|
| Enable selection of more than one option | Can the user select more than one option? | True |
| Enable user entered option | Can the user enter their own value? | False |
| User entered option label | The field label to display for user-entered options | Other |
| Options | The options to select from. Click Add options to add more. | Medium, Large |

Lookup field type specific fields

The lookup field section is still a work in progress, so the table below may be subject to change. Please reach out to support@mywavesupport.zendesk.com if you have any questions.

| Field | Description | Example |
|--|--|--|
| API Endpoint | The API endpoint is set to refence a previously created MyWave config file. | \${config.getcustomers} |
| API Param | The value sent to the API which will be used for the lookup. | {customerName} |
| Minimum Number of Characters to Trigger Lookup | The API lookup will be sent once the required number of characters has been entered. | 3 |
| Waiting to Trigger Lookup Message | This message will be displayed until the user enters enough characters. | You need to enter at least 3 characters |
| Work in Progress | More information on this field to come | |

Request User ID

This interaction type is utilised for user authentication on the front end. The user will be prompted to log in if not already authenticated. If already logged in, it is skipped.

| Field | Description | Example |
|------------------------------|--|--|
| Unauthenticated Error Msg | This error message appears if the user is not authenticated to perform the task. | You must be authenticated to do that |

Confirmation

This interaction type is used to ask the user a Yes/No (Boolean style) question.

| Field | Description | Example |
|-------------------------|---|-------------------------------|
| Label | The label visible to the user on the frontend. | Are you over 18 years old? |
| Кеу | The key used to access the answer in future prompts and conditions, assessed using variables: \${replies.person_to_buy_for}. | person_to_buy_for |
| Positive Answer | The label for a positive answer. | Yes |
| Negative Answer | The label for a negative answer. | No |
| Owner Entity | This refers to the specific option within the entity where the information will be recorded. If the platform is unaware, it will prompt the user. | person_to_buy_for |
| Pre Filled With | This indicates the item within the selected entity option that pre-fills this field if available. | Size |
| Application Strategy | Follow Cloud Definition: Utilises the setting selected under the entity item. Confirm Required: Shows the field with its pre- filled value, allowing the user to change it. Confirm Not Required: Skips this field if there is a pre-filled value. Force User Input: Displays the empty field even if it has a pre-filled value available. | Confirm Required |

Conversation End

This interaction type is used to signal the end of the Wave process. For example: 'Thanks, \${replies.user_name}, we're all done.'

User Consent

This interaction type is used to confirm details with the user before completing an action (for example verifying information before submitting a purchase order).

The user will be presented with the saved values for each field listed under "Consent Fields" and given the option to either edit the values or confirm their correctness. If the user opts to modify a value, they will be redirected to the original question where they initially provided the information.

| Field | Description | Example |
|----------------|---|--------------|
| Action | What will be happening after the consent – this value is just a guide, so it doesn't really matter what is entered. | |
| Consent Fields | These are the fields you want the user to confirm. | Size, colour |

Entities Selection

The entities selection interaction type allows a user to store information about other entities so that they can be referred to later in the Wave. For example, someone they know. The end-user will be able to select either themselves (providing the entity type of the relationship in the Entities Selection is PERSON), someone that they know that the platform already knows about, or a new person.

| Field | Description | Example |
|-------------------------|---|-------------------|
| Label | The name of the entity selection, displayed for the Wave Generator in the back-end. | Someone I know |
| Кеу | The key used to access the answer in future prompts. | person_to_buy_for |
| Relationship | This establishes the connection between the provided input and an entity, managed in the relationships tab. | someone_i_know |
| Add New Entity Label | This labels the option the user selects to add a new entry. | Someone Else |

InfoPlugin assigned values

InfoPlugins in MyWave serve as connectors that facilitate the integration of MyWave with other platforms. These connectors enable actions such as posting a sales order.

For example, to post a sales order on your final "Wave End" item you would:

- 1. Select the pre-imported InfoPlugin from the dropdown menu
- 2. Complete the table of pre-filled required parameters using the variables from the Wave or other locations.

For example, the parameter salesOrder.user_name may be populated with the preobtained value \${replies.user_name}.

| Field | Description | Example |
|----------------------|--|------------------------------|
| Select InfoPlugin | The InfoPlugin to which the value will be assigned | Check Business Partner |
| Assigned Value | This is the name of the variable where you store the response of the info plugin, allowing you to use it in your Wave. It will appear in the list of \${replies.variable} once set. | busines_partner_check |
| Parameter | The key within the InfoPlugin to which the value will be assigned. | BusinessPartner.partner_name |
| Value | The value to be passed to the assigned key within the InfoPlugin. | Sysdoc |

InfoPlugin Bindings

InfoPlugin bindings work like assigned values but do not store the sent values. Instead, only the final response is stored. This is useful for sensitive data, such as credit card numbers, where it's more secure to store only the response success token.

If you wish to update one or more values with information from the InfoPlugin, you should select 'Add Answer Bindings' and specify the fields you want to update, along with the corresponding response property from the InfoPlugin to replace them

| Field | Description | Example |
|----------------------|--|------------------------------|
| Select InfoPlugin | The InfoPlugin to which the value will be assigned | Check Business Partner |
| Parameter | The key within the InfoPlugin to which the value will be assigned. | BusinessPartner.partner_name |
| Value | The value to be passed to the assigned key within the InfoPlugin. | Sysdoc |

| Field | The field you wish to update with information from the InfoPlugin. | Company |
|-------------------|--|------------------------------|
| Answer Binding | The response property from the InfoPlugin that will update the selected field. | BusinessPartner.partner_name |

Condition items

The other types of items that can be added to a Wave process are conditions:

| Condition | Description |
|-----------|--|
| When | Execute actions when certain conditions are met, based on saved variables or answers. Optionally, define actions for execution when those conditions aren't met. For example, determine if a store has the requested item in stock or not. |
| While | Execute actions continuously as long as certain conditions are met. For example, continuously poll an unreliable API until it becomes available. |
| DoWhile | Similar to the While condition, Similar to the While condition, but the conditions are evaluated after the actions are executed at least once. For example, continuously attempt to purchase a product while it's in stock, reassessing availability after each attempt. |
| Until | Continue executing actions until a specified condition becomes true. For example, keep polling the delivery status until it changes to 'Delivered'. |
| DoUntil | Similar to the Until condition, except the conditions are evaluated after the actions are executed at least once. For example, keep checking the delivery status until it changes to 'Delivered' after placing an order. |

Condition expressions

Condition expressions are defined using <u>FreeMarker</u>. Variables are stated using the \${} operator.

Examples:

User role equals Approver:

• \${replies.user_role} == 'Approver'

User role does not equal approver:

• \${replies.user_role} != 'Approver'

A value is greater then 150, or is 0

• \${replies.price} > 150 || \${replies.price} == 0

A username value has been provided:

• \${replies.user_name}??

A reference code is uppercase and starts with an H

\${intentAttribute.refrence_code}?upper_case &&
 \${intentAttribute.refrence_code}?ensure_starts_with('H')

There are more conditions available. See the <u>FreeMarker documentation</u> for more information.

Deploying workspaces

After the Wave process models have been configured, they must be deployed to the platform so they can be used by end users.

Export workspace

- 1. Select your **Workspace** from the left-hand menu.
- 2. Go to the Workspace Library tab.
- 3. Click Export.

Result: The workspace is exported and saved to your downloads folder.

Accounts

Change your password

- 1. Click ... next to user settings on the left-hand menu
- 2. Select Change Password.
- 3. Enter your current password.
- 4. Enter your new password and confirmation.
- 5. Click **Save**.

User Details

The **User Details** section provides an overview of the account details linked to the currently logged-in user.

Other information

NLP vs LLM (in the context of this product)

Natural Language Processing (NLP)

NLP needs training for specific situations and struggles with different sentence structures or spelling errors. It works within set limits.

Large Language Models (LLM)

LLMs are more complex and can handle information presented in different ways. But there's a risk of misunderstanding, especially with nuanced language.