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VCX AI Assistant Reference

Release

June 2026

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VCX AI Assistant – UI Reference Guide

Overview

VCX AI Assistant is a conversational interface in Teradata Vantage Customer Experience (VCX) that lets you interact with VCX components using natural language - without navigating multiple screens.

With VCX AI Assistant you can perform the following tasks:

- Manage channels, interaction points, message groups, messages, criteria using JEP expression, Machine leaning strategies and workflows
- Search data - explore and retrieve information across your system
- Create, update, delete, promote, and run workflows

The assistant interprets requests, executes actions in the background, and returns clear, structured responses.

- Write actions (create) require your confirmation
- Read-only actions run automatically

Important: The VCX AI Assistant only performs changes after your approval; all modifications are presented for review before execution.

How the AI Assistant Works

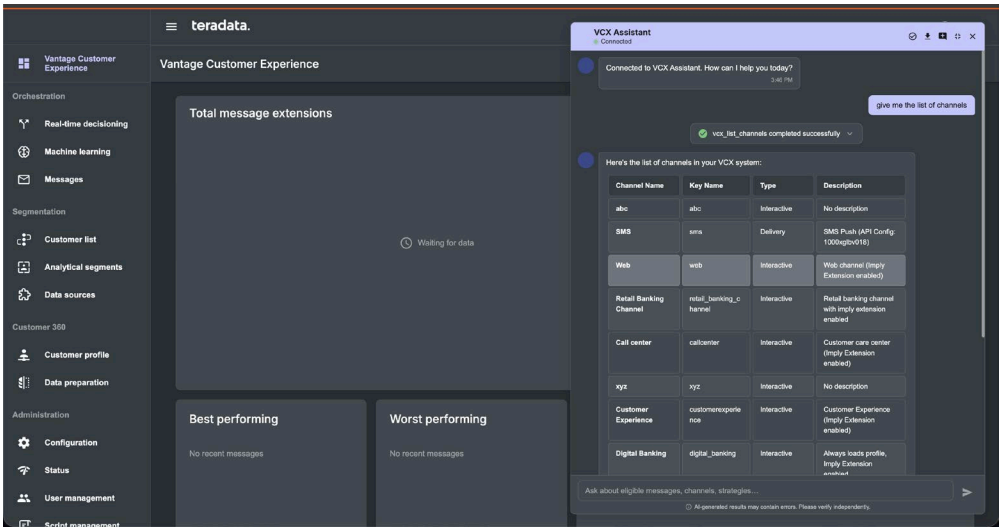
The VCX AI Assistant processes your requests through a simple, guided workflow:

- Enter your request in the message field.
- The assistant interprets the request and determines the required action.
- For read-only actions, results are displayed immediately.
- For data-changing actions, a confirmation prompt is displayed
- After confirmation, the assistant executes the action and displays the results.

Results are displayed in the conversation as formatted text, tables, or structured outputs. You can also download the chat, start a new session, or adjust settings at any time.

AI Assistant Interface

Header and Controls



The header displays the assistant name and current connection status.

You can use the header controls to:

- Reconnect to the assistant (if disconnected)
- Enable or disable Auto-Approve
- Download the conversation
- Start a new chat session
- Expand or collapse the panel
- Close the assistant

Control Visibility by Scenario

Scenario	Available Controls	Hidden Controls
Normal (connected)	Auto-Approve, Download, New Chat, Expand, Close	Reconnect
Disconnected	Reconnect, Auto-Approve (disabled), Download, New Chat, Expand, Close	None
Expanded panel	Auto-Approve, Download, New Chat, Collapse, Close	Expand

Scenario	Available Controls	Hidden Controls
Empty chat (no messages)	Auto-Approve, Download (disabled), New Chat, Expand, Close	Reconnect

Connection and Reconnection

The VCX AI Assistant maintains a WebSocket connection to its backend services. If the connection is interrupted (for example, due to network issues, server restarts, or session timeouts), the interface updates to reflect the disconnected state and provides options to re-establish the connection.

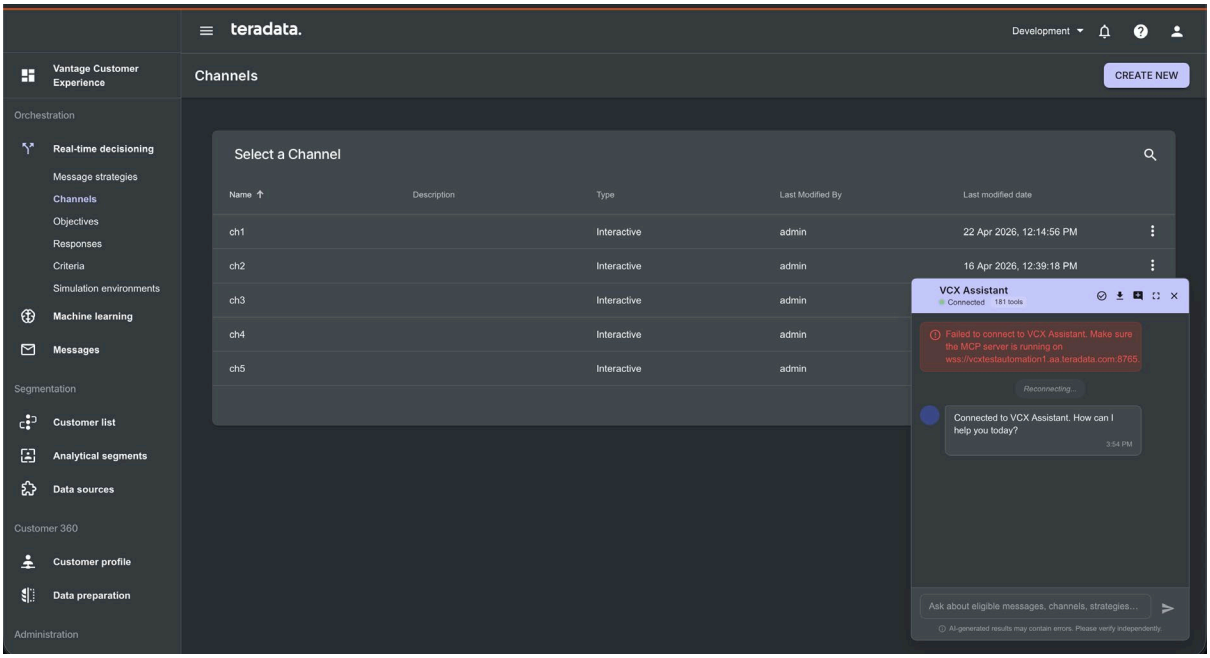
Connection States

State	UI Indicator	Available Action
Connected	Green indicator with Connected label	All controls are enabled
Disconnected	Grey or red indicator with ‘Disconnected’ label	Reconnect option is available in the toolbar
Reconnecting	System message displayed (for example, ‘Reconnecting…’)	Wait for automatic retry
Reconnection successful	Green indicator restored with confirmation message	Resume normal usage
Reconnection failed	Remains in disconnected state	Manually select Reconnect

Reconnection Behaviour

This is how the assistant behaves when the connection is interrupted and restored:

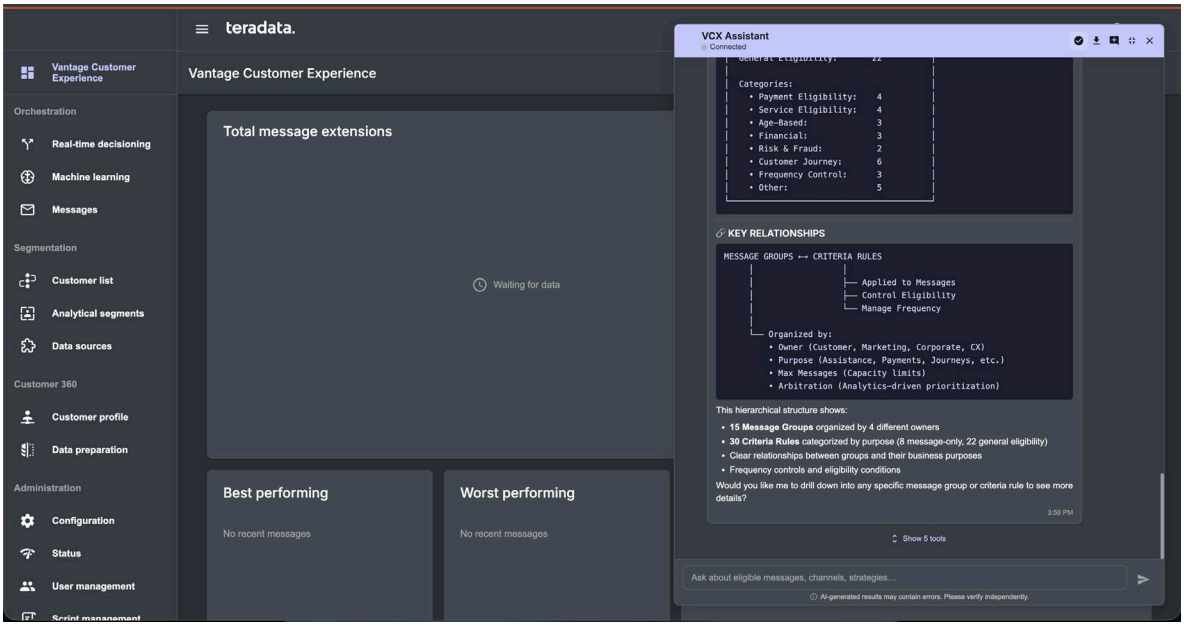
- A system message is displayed in the chat indicating reconnection is in progress.
- On success, the connection indicator returns to green and normal operation resumes.
- Auto-Approve is reset to Off after reconnection for safety.
- Previous messages remain visible but are not retained in the new backend session context.



Chat Messages

The chat area displays the conversation between you and the assistant in chronological order. Message types include:

- User message: Prompts and questions sent by the user
- Assistant message: Responses from the AI assistant, rendered as formatted Markdown
- System message: Status messages such as auto-approval updates or connection changes
- Error message: Appears when the assistant encounters an error while processing a request
- Tool status message: Shows tool execution status (running, success, or failed)



Message Formatting

The assistant formats messages to improve readability and usability within the chat interface:

- Supports Markdown formatting, including headings, bold, italics, lists, tables, and code blocks
- Displays timestamps for each message
- Shows long responses in a scrollable view while keeping the input field fixed at the bottom

Message Input

The input area is fixed at the bottom of the VCX AI Assistant panel and is the primary interface for interacting with the assistant. Use the input area to interact with the assistant.

- Press Enter to send a message
- Press Shift + Enter to add a new line
- Select Stop to interrupt a response in progress

Tool Execution Status

When the assistant runs an operation (like listing channels, creating messages, running promotions), a status entry is displayed in the message stream. This provides visibility into the progress and outcome of the action.

Status types

The following status types indicate the progress and outcome of an action:

- Running: Indicates that the action is in progress
- Success: Indicates that the action completed successfully
- Failed: Indicates that the action did not complete successfully

View Tool Details

Use the following options to view or hide detailed information for each action:

- Select Expand details to view input parameters and results
- Select Collapse details to hide the information

Note: Details are available only after the action completes.

Show or Hide Tool Entries

Select **Show tools** to display hidden entries or **Hide tools** to collapse entries and reduce clutter.

Tool Execution Behaviour

- Single read-only action: Displays a running indicator followed by the result
- Multiple actions: Displays multiple status entries in sequence
- Failed action: Displays a failure status; additional details may be shown
- Auto-approved action: Runs directly without a confirmation dialog
- Manually approved action: Requires confirmation before execution

Run Actions with Confirmation

When an action modifies data, the assistant displays a confirmation message before execution.

You can:

- Review the action details
- Modify input values
- Confirm or cancel the action

After confirmation, the assistant executes the action and displays the result.

Dialog Layout

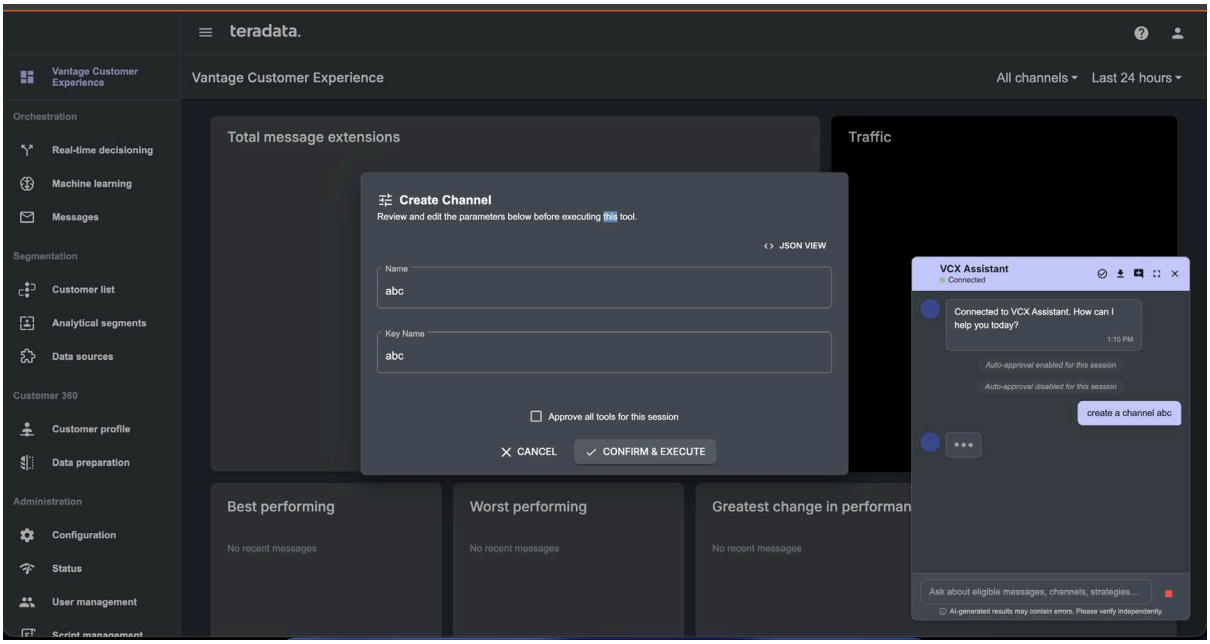
The confirmation dialog includes the following elements:

- Title: Displays the action name (for example, Create Channel or Promote Message)
- Parameters: Shows input details in either Form view or JSON view
- View toggle: Switches between structured fields and JSON editor
- Approve all option: Enables auto-approval for subsequent actions in the session
- Actions: Select Cancel to reject or Confirm & Execute to proceed

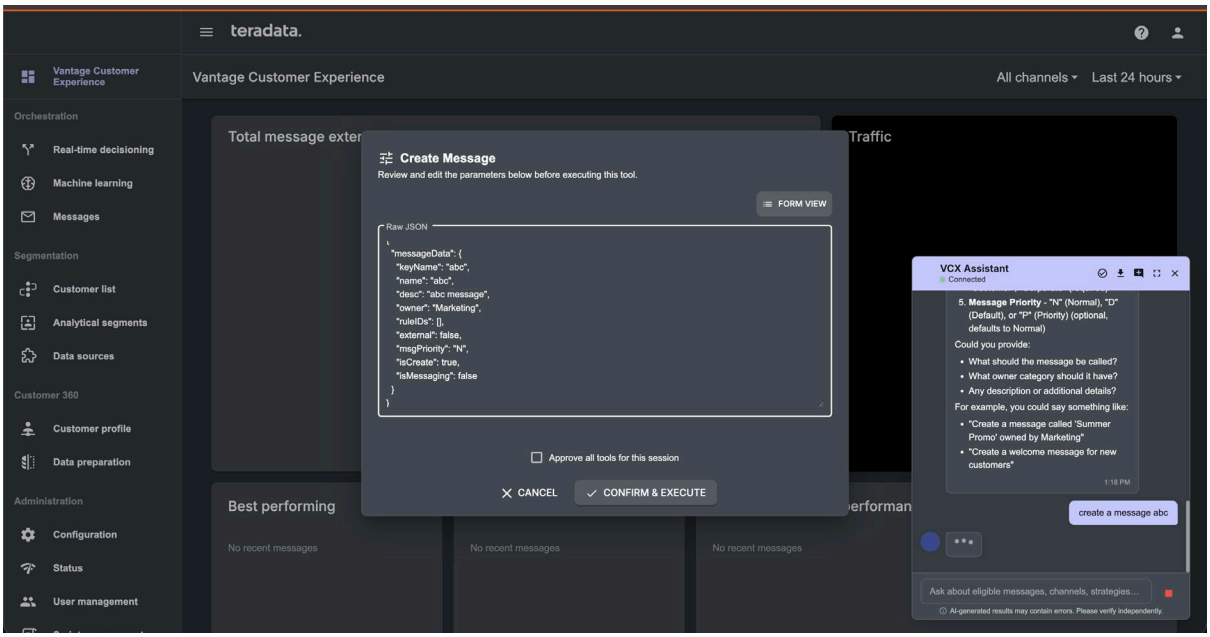
Form View and JSON View

The confirmation dialog supports the following view modes:

- Form view: Displays parameters as labelled fields for easy reading and editing, as shown in the following screenshot:



- JSON view: Displays the complete parameter set as editable JSON for advanced use cases, as shown in the following screenshot:



Tip: You can switch between Form view and JSON view without losing changes.

Approve All Option

In the confirmation dialog, select Approve all tools for this session to enable auto-approval. This option has the same effect as enabling Auto-Approve from the toolbar.

Use Auto-Approve

Auto-Approve allows actions to run without manual confirmation for the current session.

- Off (default): Confirmation is required for each action
- On: Actions are executed automatically

Auto-Approve is reset if the connection is interrupted.

Auto-Approve Behaviour

The following scenarios describe how Auto-Approve behaves:

- Enable from toolbar: Displays a system message indicating that auto-approval is enabled for the session
- Disable from toolbar: Displays a system message indicating that auto-approval is disabled for the session
- Enable from confirmation dialog: Applies the same behaviour as the toolbar option and takes effect immediately
- Reconnection after interruption: Auto-Approve is automatically reset to Off
- Read-only actions (for example, list or search): Do not require confirmation, regardless of the Auto-Approve setting

Note: Auto-Approve resets to Off after a reconnection to prevent unintended actions after a session interruption.

Message Input Area

The message input area is located at the bottom of the VCX AI Assistant panel and is the primary interface for interacting with the assistant.

Input Components

The input area includes the following elements:

- Text input field: Enter prompts, questions, or follow-up messages
- Send: Submits the current message
- Stop: Interrupts response generation (available while a response is in progress)
- Disclaimer: Indicates that AI-generated results should be reviewed for accuracy

Input Behaviour

This is how the input area behaves during different interaction states:

- Press Enter to send a message
- Press Shift + Enter to insert a new line
- The Send option is unavailable when the input field is empty or the assistant is disconnected
- During response generation, the input may be read-only and Stop is available

Input States

The following states describe how the input area behaves during different interaction conditions:

- Idle (no text): Send is unavailable; input is editable
- Idle (with text): Send is available; input is editable
- Processing response: Stop is available; input may be read-only
- Disconnected: Send is unavailable; input may be disabled
- After Stop: Send is restored; input is editable

Open, Close, and Expand the Chat Panel

The VCX AI Assistant panel supports multiple display states to control how much screen space it occupies.

Panel States

- **Closed**
    - Select Close to hide the panel
    - Only the Open Chat button is visible

    - Select Open Chat to reopen
- **Open (compact)**
    - Opens by default or when you select Open Chat
    - Displays the toolbar, messages, and input area
    - Select Close or Expand to change the state
- **Open (expanded)**
    - Select Expand to increase the panel size
    - Displays the same content as compact view with more space
    - Select Collapse or Close to exit

Open Chat

When the panel is closed, select the floating Open Chat button to open the assistant.

Expand and Collapse

Use the expand and collapse controls to adjust the panel size based on your viewing needs.

- Select Expand to increase the panel size for better visibility
- Select Collapse to return to the compact view
- The same control toggles between expand and collapse states

Download Chat

Use Download Chat to save the current conversation for reference or sharing.

- Available from the toolbar (disabled when no messages exist)
- Downloads the full conversation, including user, assistant, and system messages
- Useful for documentation, troubleshooting, and collaboration

Start a New Chat

Use New Chat to clear the current conversation and start a new session.

- Removes all messages from the chat panel
- Displays a new welcome message
- Retains the current Auto-Approve setting

Note: Starting a new chat clears the conversation history but does not disconnect the session.

Loading Indicator

When the assistant is processing a request, a loading indicator appears in the message area.

- Displays an animated indicator during processing
- Enables the Stop option to interrupt the response
- Replaces the indicator with the assistant response once complete

System Messages

System messages provide status updates within the conversation.

- Auto-approval enabled for this session: Displayed when Auto-Approve is enabled
- Auto-approval disabled for this session: Displayed when Auto-Approve is disabled
- Reconnecting…: Displayed when the connection is interrupted and retrying
- Chat cleared. How can I assist you?: Displayed after starting a new chat
- Tool cancelled by user: Displayed when an action is cancelled

UI Controls Reference

The following list shows the UI controls, their location, function, and availability.

Header

- VCX Assistant title — Identifies the assistant panel (always visible when open)
- Connection indicator — Shows connection status (always visible when open)
- Reconnect — Retries the connection (available when disconnected)
- Auto-Approve (Off) — Indicates manual approval (when Auto-Approve is disabled)
- Auto-Approve (On) — Indicates automatic approval (when Auto-Approve is enabled)
- Download Chat — Saves the conversation (disabled if no messages exist)
- New Chat — Starts a new session (always available)
- Expand — Enlarges the panel (when in compact view)
- Collapse — Returns to compact view (when expanded)
- Close — Hides the panel (always available)

Panel Controls

- Open Chat — Opens the assistant panel (available when the panel is closed)

Messages Area

- User message — Displays user input (after sending a message)
- Assistant message — Displays assistant responses
- System message — Displays status updates
- Error message — Displays error information
- Tool status (Running) — Indicates an action in progress
- Tool status (Success) — Indicates a completed action
- Tool status (Failed) — Indicates a failed action
- Expand details — Shows action inputs and results (after completion)
- Collapse details — Hides action details
- Show tools — Displays hidden tool entries
- Hide tools — Collapses tool entries

Confirmation Dialog

- JSON view toggle — Displays editable JSON
- Form view toggle — Displays structured fields
- Approve all — Enables session-level auto-approval
- Cancel — Rejects the action
- Confirm & Execute — Approves and runs the action

Input Area

- Text input — Enter prompts or messages (always available when panel is open)
- Send — Submits a message (when text is entered)
- Stop — Interrupts response generation (while processing)
- Disclaimer — Displays AI usage notice (always visible)

State-Dependent Controls

Some controls change their appearance or behaviour based on the current state.

- Auto-Approve — Toggles between enabled and disabled states
- Expand and Collapse — Switches the panel between compact and expanded views
- Send and Stop — Changes based on whether the assistant is processing a request
- Form view and JSON view — Switches the display format in the confirmation dialog
- Expand details and Collapse details — Shows or hides action details for each entry

- Show tools and Hide tools — Toggles visibility of tool entries
- Open Chat and Close — Controls panel visibility

Note: When capturing screenshots, include both states for toggle controls and label them clearly (for example, Auto-Approve: Off and Auto-Approve: On).

Use Cases and Behaviour

The following scenarios describe how the assistant behaves under specific conditions:

Long Responses

- Long responses are displayed in a scrollable view within the message area
- The input area and toolbar remain accessible
- You can scroll to review earlier content

Multiple Actions in a Single Request

- The assistant may perform multiple actions to complete a request
- Each action is displayed as a separate status entry
- If Auto-Approve is disabled, confirmation prompts appear for each action

Connection Interruption During Execution

- If the connection is interrupted during execution, the action may remain in a running state
- After reconnection, the assistant starts a new session context
- Verify results after reconnecting

First-Time (Empty) State

- A welcome message is displayed when the assistant is opened for the first time
- The input area is ready for your first prompt
- Download Chat is unavailable until messages exist

Session Behaviour

- The conversation is tied to the current session
- Refreshing the page or navigating away clears the conversation
- Selecting New Chat clears messages without reloading the page

Multiple Rapid Requests

- Messages sent during response generation are queued
- Use Stop to interrupt the current response before sending a new request

Large Input Data in Confirmation Dialog

- Large or complex input values are displayed in a scrollable view
- Use JSON view for detailed inspection
- Form view may display complex structures in simplified format

Appendix A: Keyboard Shortcuts

Use the following keyboard shortcuts in the message input area:

- Enter — Send the current message
- Shift + Enter — Insert a new line without sending the message

Appendix B: Glossary

- VCX — Vantage Customer Experience, the Teradata application for customer decisioning
- AI Assistant — Conversational interface for interacting with VCX using natural language
- Tool — Backend operation executed by the assistant (for example, create or retrieve data)
- Auto-Approve — Session setting that allows actions to run without confirmation
- Session — Active interaction period between the user and the assistant