Chat platform integration responsibilities

Implementation of the chatbots needs several practices to be used and implemented. Some of the practices are only process driven activities, others can require implementation.

In the chapters lower those practices are described. For each country there must be agreed / decided

- how this practice will be implemented
- what party will be responsible for realization (it can be Erste / George-labs or the local country)

Chatbot Governance

Release management

Chatbot release management is typically different to the standard release management of the George application. There needs to be aligned the Chatbot releases with George team. There can be typically two types of releases: Small / adhoc and big / monthly (aligned with BOM release cycle). For these releases there needs to be understood:

- Small releases
    - how will this be planned?
    - who will be informed?
    - will it cause the outage of the service for the clients?
    - will be at least human handover available?
    - will be the chat widget set to the maintenance mode?
- Big releases
    - BOM releases are typically without or with very small outage. Is it going to plan together with BOM releases.
    - how will this be planned?
    - who will be informed?
    - will it cause the outage of the service for the clients?
    - will be at least human handover available?
    - will be the chat widget set to the maintenance mode?

Scope management, approval and review

The chatbot must be able to answer the George topics. The scope of the topics must be agreed with George PO. The topics to be covered need to be aligned in advance.

Further development of the new chat features need to be aligned as well and need to be taken care by local country following the other described rules. (e. g. *there will be developed new feature in George or some existing feature is going to be changed. The answers of the chatbot must be updated accordingly*).

Human-handover must be available where appropriate. The place where it is mandatory needs to be agreed and implemented.

Development guide for chatbot visual components

As George is providing the GUI for the webchat all the visual elements are presented as part of the George chat widget. Therefore only supported visual elements can be sent to the webchat.

There is prepared the guide what are the supported visual elements here: Chat solution restrictions and rules

The best guide is the mock implementation of the cc-adapters application which is available in the Github.

Chatbot implementation

Implementation of the skill is typically fully in the responsibility of the local bank.

The implementation must fulfill the basic business requirements coming from the George. The general list of the requirements can be found here: Chatbot business rules

Chatbot integration with Erste chat platform API

The integration with the Erste chat platform is described here: Chat API Implementation, Simple UC

We recommend two ways of integration with Erste chat platform

Full integration

This integration type is typically recommended for integration with chatbot. In some cases it can be used for Human handover flow integration as well.

As described on the Chat API Implementation, Simple UC page in this case responsibilities of the Erste chat solution is:

- Ensure proper session management
- Ensure integration with Identity Provider and the all the error logic connected
- Ensure orchestration (see in the next chapter)

Local bank responsibilities are:

- All the content including the welcome message
- Integration with the CC system
- Logic for CC status (open / closed), logic for the bankers availability (bankers are available, or there is a queue).
- Provide separate API for the bankers availability (Country Integration APIs)

In the type there is still possible to delegate the basic welcome message to the Erste chat solution. As the Erste chat solution is running "locally" it can save network traffic for all the chats which are only opened but no questions / input is raised.

Reporting as such is described in separate chapter.

Human Handover flow integration only

This integration type is typically recommended for the integration with CC system in case only chat with the bankers is targeted.

As described on the page Chat API implementation for CC only in this case responsibilities of the Erste chat solution is:

- Ensure proper session management
- Ensure integration with Identity Provider and the all the error logic connected
- Ensure orchestration (see in the next chapter)
- Providing of the welcome message (and ensuring the welcome message based on the CC status (opened / closed)

Local bank responsibilities are:

- Chat content with the banker
- Integration with the CC system
- Logic and the messages for the bankers availability (bankers are available, or there is a queue).
- Provide separate API for the bankers availability (Country Integration APIs)

Reporting as such is described in separate chapter.

Chatbots orchestration facility

Utterance anonymization

There is not possible to send to any AI solution hosted on cloud the personal data (of all types). It is necessary to ensure that such data are not sent there. There needs to be agreed for each deployment / local country who will take the responsibility of the utterance anonymization.

Typically this implementation is in responsibility of local country.

Chatbot handover between skills

One the the typical responsibilities of the chatbot orchestration in multiskill environment is the handover among the conversation skills. It is fully supported by the Erste chat solution. In case this feature is going to be used in the Erste chat solution, it needs to be agreed. There is some configuration needed for that purpose. No development.

In case this orchestration feature is implemented by the local country, there is no impact on the implementation.

This feature is typically used in the "Human Handover flow integration only" (you can see the chapter above) for the handover of the processing between the welcome message bot and the CC adapter.

Conversation available across the hosting platforms in the chat Widget

The Erste chat platform supports out of the box hosting of multiple chatbots / chat in parallel. In case that one = same chatbot should be available on multiple pages and the content (=history) should be transferred between the pages, it is possible. Currently there is supported only chat handover only for non-authenticated chats. For authenticated chats it will be available during Q3 2021. Support for chat handover between non-authenticated and authenticated space is not prepared yet, but it is planned.

Common business data API to be provided

The purpose is to provide API for retrieving of the business data. In the Phase A it is expected to have very limited functions if any.

Chatbot testing

Critical part of the deployment of chatbot solution before each production release, is to check the quality of the chatbot solution as such. There should be covered:

- Automated tests of the conversations (all conversations are correctly working including correct intent)

- NLP tests (e.g. crossvalidation tests, NGram, Similarity score comparison)
- Blind tests
- Performance tests
- Penetration tests

All of these tests are mandatory and must be clearly defined who is responsible for performing of those tests.

Typically responsible party if local bank.

Reporting

Erste chat solution is integrated with the Erste reporting facility. Currently supported reports are described here: Business reporting

There are defined business events which are supported by the plaform and the reporting events are expected to be sent by the local bank to the erste solution.

Reporting events are described on this page: Reporting events requirements. The reporting events are sent through the standard Erste chat API.