

## Project Development Phase

### Sprint 1

|              |   |
|--------------|---|
| Date         | 29 October 2022                         |
| Team ID      | PNT2022TMID28190                        |
| Project Name | AI Based Discourse for Banking Industry |

### Create IBM Watson Assistant Service & Chatbot Skills

#### Creation of IBM Watson Assistant Service:

To implement AI Based Discourse for Banking Industry, we need an IBM Service.

The Service used is **IBM WATSON ASSISTANT**.

|                    |                         |
|--------------------|-------------------------|
| <b>IBM SERVICE</b> | <b>WATSON ASSISTANT</b> |
| <b>REGION</b>      | <b>DALLAS</b>           |
| <b>LANGUAGE</b>    | <b>ENGLISH</b>          |

The screenshot shows the IBM Watson Assistant web interface. At the top, there's a navigation bar with 'IBM Watson Assistant Lite', an 'Upgrade' link, and a 'Learning center' with help and user icons. The main heading is 'Welcome to the new Watson Assistant' with a 'Next' button. Below this is a progress bar with four steps: 'Create' (active), 'Personalize', 'Customize', and 'Preview'. The 'Create your first assistant' section includes instructions to name the assistant, add a description, and choose a language. The 'Assistant name' field contains 'Banking ChatBot' with a note that it's internal. The 'Description (optional)' field contains 'AI BASED DISCOURSE FOR BANKING INDUSTRY' with a character count of 39/128. The 'Assistant language' field is partially visible at the bottom.

IBM Watson Assistant Lite Upgrade Learning center ?

Welcome to the new Watson Assistant Next

Create Personalize Customize Preview

Create your first assistant

Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.

Assistant name

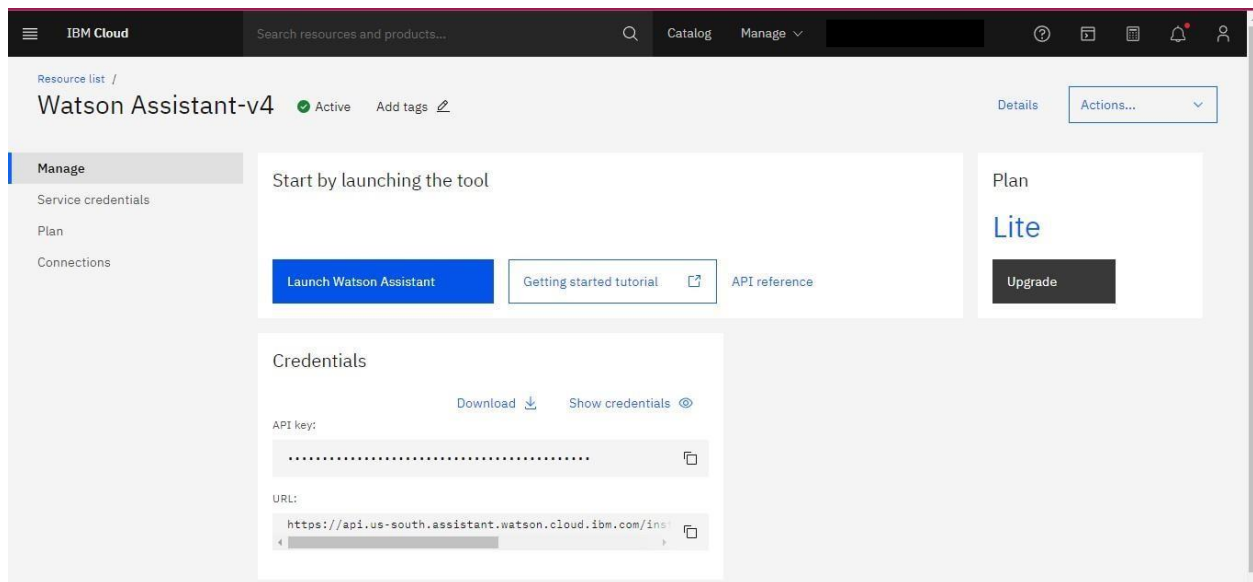
Banking ChatBot

Your assistant name will be kept internally and not visible to your customers

Description (optional) 39/128

AI BASED DISCOURSE FOR BANKING INDUSTRY

Assistant language



### Creation of Chatbot Skills:

Skills are nothing but actions and steps. Steps are the subset of actions where conversations are built and Assistant is used to integrating skills.

The Chatbot build for the project AI Based Discourse for Banking Industry is based on **ACTION SKILLS**.

| SKILL TYPE | ACTION OR STEP SKILL |
|------------|----------------------|
| LANGUAGE   | ENGLISH              |

IBM Watson Assistant interface showing the initial setup for a "Greeting" action. The interface includes a sidebar with a "Customer starts with:" section and a "Conversation steps" section. The main area displays the "Customer starts with:" section, which includes a text input field for "Enter phrases your customer might use to start this action" and a list of suggested phrases: "Hey", "Hi", "Hello", and "Greeting". The "Conversation steps" section shows a single step with the text "This step has no content" and a "Continue to next step" button. The interface also includes a "Preview" button and a "New step" button.

IBM Watson Assistant interface showing the configuration of a "Greeting" action. The interface includes a sidebar with a "Customer starts with:" section and a "Conversation steps" section. The main area displays the "Step 1 is taken" section, which includes a "without conditions" dropdown and a "fx" button. The "Assistant says" section contains a text input field with the text "Good to see you." and a "Define customer response" dropdown. The "And then" section contains a "Continue to next step" dropdown. The interface also includes a "Preview" button and a "New step" button.

IBM Watson Assistant interface showing a conversation step configuration for "Greeting".

**Customer starts with:** Greeting

**Step 1 is taken:** without conditions

**Assistant says:** Good to see you.

**Conversation steps:** 1. Good to see you. (Continue to next step)

**And then:** Continue to next step

**Preview:** Greet customer [default] - Welcome, how can I assist you? (Input: hello) - Greeting recognized - Good to see you. - There are no additional steps for this action. Add a new step or end the action.

IBM Watson Assistant interface showing a conversation step configuration for "Greeting" with a linked action.

**Customer starts with:** Hey

**Step 1 is taken:** without conditions

**Assistant says:** Good to see you.

**Conversation steps:** 1. Good to see you. (Go to action: Index)

**And then:** Go to another action

**Linked Action:** Index

**Preview:** Greet customer [default] - Welcome, how can I assist you? (Input: hey) - Greeting recognized - Good to see you. - Index recognized - How can I help you? (Select an option)

IBM Watson Assistant interface showing the Actions tab. The interface includes a sidebar with navigation options: Actions, Created by you, Set by assistant, Variables, Created by you, Set by assistant, Set by integration, and Saved responses. The main area displays a table of actions:

| Name     | Last edited   | Status |
|----------|---------------|--------|
| Index    | 6 minutes ago | ✓      |
| Greeting | 2 minutes ago | ✓      |

At the bottom, there is a pagination bar showing "Items per page: 50" and "Showing 1-2 of 2 actions". A "Preview" button is located at the bottom right of the table area.

**Note: In this Sprint 1, there is no code needed to create assistant and skills, it purely based on Actions and steps.**