

Project Development Phase

Sprint 1

Date	1 NOVEMBER 2022
Team ID	PNT2022TMID43835
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**.

IBM SERVICE	WATSON ASSISTANT
REGION	DALLAS
LANGUAGE	ENGLISH

The screenshot shows the IBM Watson Assistant 'Create your first assistant' interface. At the top, there's a navigation bar with 'IBM Watson Assistant Lite' and an 'Upgrade' link. On the right, there's a 'Learning center' link and two circular icons. Below the navigation bar, a 'Welcome to the new Watson Assistant' message is displayed with a 'Next' button. A progress bar shows four steps: 'Create' (active), 'Personalize', 'Customize', and 'Preview'. The main heading is 'Create your first assistant', followed by a subheading and a paragraph: '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.' Below this, there are three input fields: 'Assistant name' with the value 'Banking ChatBot', 'Description (optional)' with the value 'AI BASED DISCOURSE FOR BANKING INDUSTRY', and 'Assistant language'. A note below the name field states: 'Your assistant name will be kept internally and not visible to your customers'. A character count '39/128' is visible next to the description field.

IBM SERVICE	WATSON ASSISTANT
REGION	DALLAS
LANGUAGE	ENGLISH

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

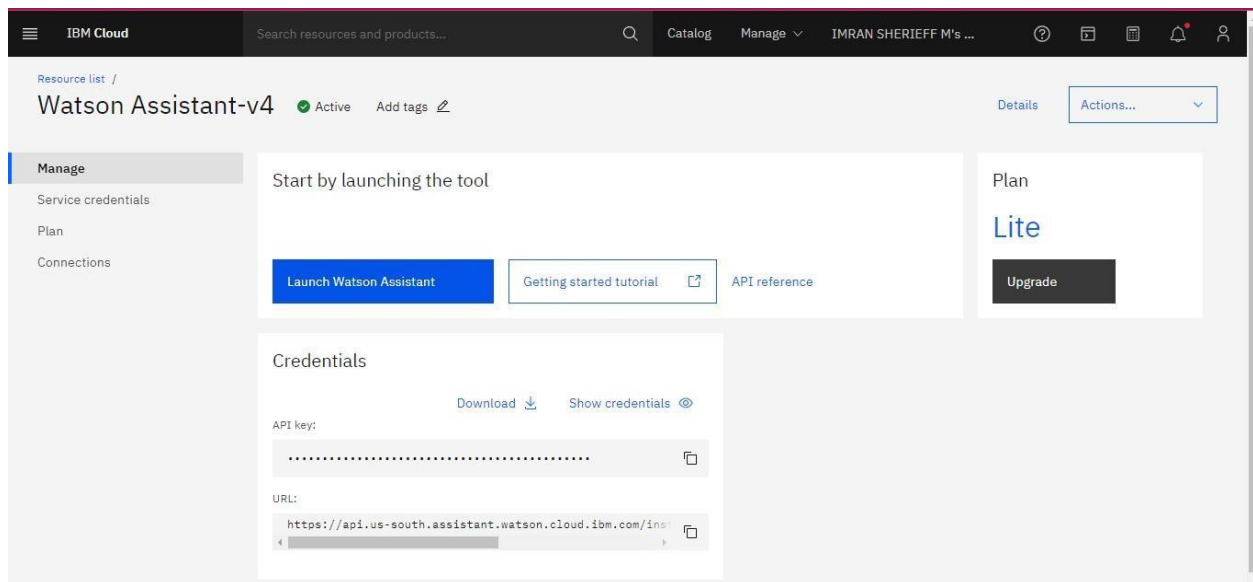
Banking ChatBot

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 instructions for defining the action and a list of phrases to start the conversation.

Customer starts with:

Enter phrases that a customer types or says to start the conversation about a specific topic. These phrases determine the task, problem, or question your customer has. The more phrases you enter, the better your assistant can recognize what the customer wants.

Enter phrases your customer might use to start this action. Total: 4

Enter a phrase

Hey

Hi

Hello

Greeting

Conversation steps

1 This step has no content. Continue to next step

New step

Preview

IBM Watson Assistant interface showing the configuration for the "Greeting" action. The interface includes a sidebar with a "Customer starts with:" section and a "Conversation steps" section. The main area displays the configuration for the first step, including the action name, conditions, and the assistant's response.

Customer starts with:

1 total step 0 end steps 0 re-ask steps

Conversation steps

1 Good to see you. Continue to next step

Step 1 is taken without conditions

Assistant says

Good to see you.

Define customer response

And then

Continue to next step

New step

Preview

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? (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 an 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

Configuration: Goes to action: Index, Pass values, Upon return: Continue, Edit settings, Edit passed values

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

IBM Watson Assistant interface showing Actions.

Actions

- Created by you
- Set by assistant
- Variables
- Created by you
- Set by assistant
- Set by integration
- Saved responses

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

Items per page: 50 Showing 1-2 of 2 actions

1 1 of 1 pages

Preview

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