

# IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide

Description	IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide
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# Welcome

Welcome to the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide (lab guide). The lab guide is part of the IBM watsonx Assistant for Z for Technical Sales Level 4 learning plan for IBM and Business Partner Technical Sales and related badge. The learning plan is intended to teach technical sellers and business partners how to conduct a proof of experience (PoX) for a client.



## In a fast paced world, things change

The products and services may appear differently than what is shown in the lab guide. This can occur if the product or service is updated with a new version.

Responses generated by IBM watsonx Assistant for Z are likely to change over time. The responses you see when you run the queries in this section may differ from the screen images captured in the lab guide.

This lab guide covers the setup, configuration, and usage of watsonx Assistant for Z. This lab guide leverages the [IBM watsonx Assistant for Z Velocity collection](#) and the 3 Velocity Pilot lab environments in IBM Technology Zone ([ITZ](#)).

The lab guide also enables dedicated lab environments for customized client Proof of Experiences (PoX) and demonstrations. If you are preparing for an actual pilot engagement, refer to the [Pilot Scoping Guide for watsonx Assistant for Z](#) for additional information.

The lab guide provides guidance to:

- Provisioning the lab environments
- Creating an assistant and configuring conversational search
- Configuring assistant settings
- Testing conversational search
- Deploying a dedicated instance of OpenSearch for client document ingestion (Optional)
- Importing skills for z/OS automations
- Connecting apps to assistants
- Creating assistant actions
- Creating skill flows and custom-built actions
- Importing pre-packaged z/OS skills
- Publishing and deploying your assistant

## Support

Think something is down? Check the applicable status pages for any known issues like a site or service not available:

- [IBM Technology Zone](#)

For issues with provisioning the ITZ environment for this lab (for example, a failed reservation request due to insufficient quota capacity) open a ticket with ITZ support:

- Web: [IBM Technology Zone](#)
- Email: [techzone.help.ibm.com](mailto:techzone.help.ibm.com)

For issues related to specific steps found in the demonstration guide after the ITZ environment is provisioned, contact the authors:

- Slack:
- [#watsonx-assistant-z-technical](#) - IBM only
- [#wxo-practitioners](#) - IBM only - for questions related to the software as a service (SaaS) instance of watsonx Orchestrate
- Email: [andrewj@us.ibm.com](mailto:andrewj@us.ibm.com)

Business Partners should use the IBM Training live Chat Support service or other support methods that are found on the IBM Training portal [here](#).

## Using the demonstration guide

Use these helpful tips to take full advantage of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide.

### Printing the demonstration guide

**⚠ Printed or saved copies can be out of date**

The IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide changes regularly to match the IBM watsonx Assistant for Z offering and associated ITZ environment. Printed or saved copies of the demonstration guide can become out-of-date quickly and result in failed steps.

A ready-to-print PDF version of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide is [here](#).

### Viewing images

Images in the demonstration guide can be enlarged by clicking on the image. Press the **Esc** key or click the **X** to dismiss the enlarged image.



2. Click **Reserve now**.  
The **Reserve now** option creates a reservation for immediate use. Optionally, schedule the reservation for a later date, like when you will be at your client's office.

3. Complete the reservation request and click **Submit**.  
The first two reservations will be similar to the first image below and have fields **a-e** that will need to be completed.

- a. Optionally, change the **Name** field for the reservation.
- b. Select the **Education** purpose tile.
- c. Enter a **Purpose description**.
- d. Select the region nearest your physical location in the **Preferred Geography** drop-down.
- e. The **End date and time** will be set to 2 days after the current date and time.
- f. Accept the IBM Technology Zone's terms and conditions and security policies.
- g. When satisfied with the parameters, click **Submit**.



## Image highlighting

In some images, the following styles of highlighting are used:

- **Solid highlight box:** This style of box highlights where to click, enter, or select an item.



- **Dash highlight box:** This style of box highlights one of two things: the path to follow to get to a specific location in the user interface, or areas to explore on your own.



## Copying commands and prompts

Copying and pasting commands and prompts from this demonstration guide is easy and can eliminate typographical errors.

Click the highlighted copy icon and then use your operating system's paste function. For example, `[^ Ctrl]+[V]` or right-click and select Paste.

Prompt 1

What is the APF list in z/OS? Provide a detailed explanation.





## Acronyms and terminology



IBM employees, and the tech industry in general, enjoy using acronyms. In the demonstration guide, most acronyms will appear with a dashed underline. Hover over the acronym to learn its meaning. A question mark (?) icon will first appear and after a second the tool tip with the acronym's meaning is displayed. Try it here: LPAR.

Guidance for delivering a demonstration

IBM watsonx Assistant for Z

Welcome

Reserve the IBM Technology Zone environment

Guidance for delivering a demonstration

Demonstration scenarios >

Next steps

Specific guidance for IBM watsonx Assistant for Z and the ITZ environment

Following the scripts provided in the IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide will help guarantee a successful demonstration. Use these tips to help insure success with IBM watsonx Assistant for Z and the ITZ environment:

- Follow the scripts in the IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide for the automations and skills to execute as expected.

Table of contents

General demonstration guidance

Specific guidance for IBM watsonx Assistant for Z and the ITZ environment



## The Demonstration Guide table of contents

This **Demonstration Guide** uses a responsive browser-based interface to ensure a pages are usable on various devices with different screen sizes. The Demonstration Guide table of contents may be displayed as highlighted in the green dashed box in this image:

The screenshot shows a browser window with the title "IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide". The left sidebar contains a green dashed box highlighting the "Table of Contents" section, which lists various demonstration scenarios and instructions. The main content area displays the "Welcome" page, which includes an introduction to the course, information about obtaining the badge, and a note about additional capabilities.

**Table of Contents:**

- IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide
- Welcome
- Guidance for delivering a demonstration
- Reserve the IBM Technology Zone environment
- Demonstration scenarios
  - Introduction to scenarios
  - Scenario 1: Authorized Program Facility
  - Scenario 2: Certificate renewal
  - Scenario 3: Db2 versioning
  - Scenario 4: Initial Program Load on Z
  - Additional IBM Z related prompts
  - Summary
  - Next steps
  - Printing the guide
  - Instructions

**Welcome Page Content:**

Welcome to the **IBM watsonx Assistant for Z for Technical Sales Level 3** course and demonstration guide! The goal of this course is to provide IBM and Business Partner technical sellers the knowledge and tools to demonstrate **IBM watsonx Assistant for Z**.

This course is not intended to serve as an in-depth study of IBM watsonx Assistant for Z, watsonx, or IBM Z; rather the focus is on learning how to deliver a client demonstration of IBM watsonx Assistant for Z. More specifically, the focus is on the *end-user* creating queries and by using trusted automations through skills that are suggested by IBM watsonx Assistant for Z.

Other aspects of IBM watsonx Assistant for Z including creating and configuring assistants, importing and creating new skills, and ingestion of client documentation are **not** covered in this demonstration guide. To learn more and get hands-on with these additional capabilities, check out the Velocity Pilot information in IBM Technology Zone (ITZ) [here](#).

Obtaining the IBM watsonx Assistant for Z Technical Sales Intermediate badge

However, if the browser window is sized smaller, the table of contents can be accessed by clicking the main menu icon (≡):

The screenshot shows a browser window with the title "IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration...". The main menu icon (≡) is highlighted with a green box. The main content area displays the "Welcome" page, which includes an introduction to the course, information about obtaining the badge, and a note about additional capabilities.

Click the main menu icon (≡) to expand the table of contents.

Continue to the [Reserve the IBM Technology Zone environments](#) section to begin the journey to obtaining the IBM watsonx Assistant for Z Technical Sales Advanced badge.

# IBM Technology Zone environment

To enable sellers to both learn how to perform client pilots of IBM watsonx Assistant for Z, multiple environments have been created in IBM Technology Zone (ITZ). The environments leveraged for the watsonx Assistant for Z Velocity lab environment can be found in the [IBM watsonx Assistant for Z](#) collection and consist of:

- **watsonx Assistant for Z lab – watsonx Orchestrate** – a dedicated tenant of watsonx Orchestrate on IBM Cloud and is leveraged for much of the assistant configuration, configuring conversational search, importing skills and configuring assistant actions
- **Ansible Automation Platform (AAP) & z/OS** – a pattern used to deploy a pre-configured instance of AAP and Wazi z/OS with pre-loaded Ansible playbooks that can be imported as skills within watsonx Orchestrate and connected to your assistant. Provides pre-loaded templates for various use cases which will be covered in a later section. To learn more about AAP, go [here](#). To learn more about Wazi, go [here](#).
- **Single Node OpenShift with NFS storage** – used to provision a single-node OpenShift cluster (SNO) on IBM Cloud used to install a dedicated instance of OpenSearch for watsonx Assistant for Z. This environment enables ingestion of client supplied documents.

While all 3 environments may not be required for a specific client pilot, to complete the Level 4 learning plan and earn the IBM watsonx Assistant for Z Technical Sales Advanced badge, you will need to provision all three ITZ environments and complete all the sections in the lab guide. Ignore any statements in the ITZ collection regarding **optional** environment or tasks.

Follow the instructions in this section to create new reservation requests, extend the reservations, and access the ITZ demonstration environments.

## Create a reservation request

1. Click each of the links to open a browser to the reservation pages of the [IBM watsonx Assistant for Z](#).



### You may be asked to authenticate to IBM Technology Zone

The steps to authenticate to ITZ are not detailed here as they may vary between users.

[watsonx Assistant for Z lab – watsonx Orchestrate - reservation page](#)

[Ansible Automation Platform \(AAP\) & z/OS - reservation page](#)

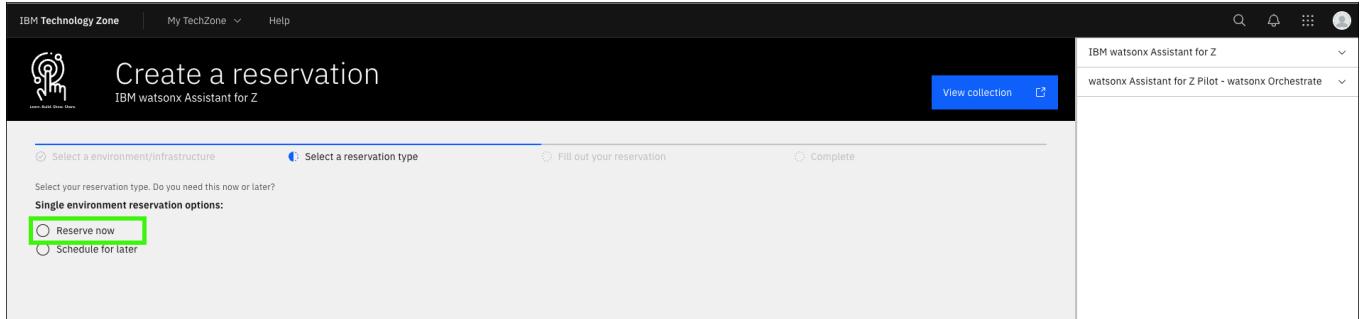
[Single Node OpenShift with NFS storage - reservation page](#)

 Images below are for 1 of the 3 environments

Be sure to follow these steps to create a reservation in ITZ for all three environments!

## 2. Click **Reserve now**.

The **Reserve now** option creates a reservation for immediate use. Optionally, schedule the reservation for a later date, like when you will be at your client's office.



The screenshot shows the 'Create a reservation' interface. At the top, there are tabs for 'IBM Technology Zone', 'My TechZone', and 'Help'. On the right, there are search and filter icons. The main title is 'Create a reservation' with a subtitle 'IBM Watsonx Assistant for Z'. Below the title, there are four steps: 'Select a environment/infrastructure', 'Select a reservation type', 'Fill out your reservation', and 'Complete'. Under 'Single environment reservation options:', the 'Reserve now' radio button is selected, while 'Schedule for later' is unselected. A blue 'View collection' button is located in the top right corner of the main form area.

## 3. Complete the reservation request and click **Submit**.

The first two reservations will be similar to the first image below and have fields **a-e** that will need to be completed.

- a. Optionally, change the **Name** field for the reservation.
- b. Select the **Education** purpose tile.
- c. Enter a **Purpose description**.
- d. Select the region nearest your physical location in the **Preferred Geography** drop-down.
- e. The **End date and time** will be set to 2 days after the current date and time.
- f. Accept the IBM Technology Zone's terms and conditions and security policies.
- g. When satisfied with the parameters, click **Submit**.

**a** Name  
watson Assistant for Z Pilot - watson Orchestrate

**b** Purpose  
Demo  
Deliver a client specific demonstration based on discovery with the client and align to the identified architecture. Automatically captures a Technical Sales Activity in IBM Sales Cloud on the Opportunity code provided.

**c** Sales Opportunity number  
Enter an opportunity number  
Providing an [IBM Sales Cloud opportunity ID](#), [an Relationship ID](#), or a [Project Work ID](#) will allow you to extend your reservation date.

**d** Preferred Geography  
ITZ-watson-2 - AMERICAS - us-south region - dat10 datacenter

**e** End date and time  
Select a date  
11/01/2024  
Select a time  
8:07 AM America/Chicago

**f** Notes  
Enter any notes you'd like to attach to this reservation

**g** Submit

In addition to the above fields, the reservation for the **Single Node OpenShift with NFS storage** will have these additional fields:

- h.** Leave the default setting of **10.128.0.0/14**.
- i.** Leave the default setting of **No**.
- j.** Select **16 vCPU x 64 GB - 300 GB ephemeral storage** in the **Master Single Node Flavor** pull-down menu.
- k.** Select **4.14** in the **OpenShift Version** pull-down menu.
- l.** Leave the default setting of **172.30.0.0/16**.



#### If your reservation for the Single Node OpenShift environment fails...



If your reservation for the Single Node OpenShift environment fails, try selecting one of the **eu-gb region** options as the **Preferred Geography**.

IBM Technology Zone | My TechZone | Help

Enter date and time | Select a date | Select a time | America/Chicago | Reservation policy: Recommended 2 days, but can be reserved up to 2 days on this reservation form. Extend later for 2 days increments up to 4 days total. Max time 6 days total.

OCP/Kubernetes Cluster Network: **10.128.0.0/14**

Enable FIPS Security: **No**

Master Single Node Flavor: **16 vCPU x 64 GB - 300 GB ephemeral storage**

OpenShift Version: **4.14**

OCP/Kubernetes Service Network: **172.30.0.0/16**

Notes: Enter any notes you would like to attach to this reservation

I agree to IBM Technology Zone's [Terms & Conditions](#) and [End User Security Policies](#)

**Submit**

IBM Watsonx Assistant for Z

Single Node OpenShift (VMware on IBM Cloud) - NFS

Policy

## Extend the reservation

During the provisioning process, multiple emails are sent to you from ITZ as the provisioning process runs. One email states the reservation is provisioning and the other email states that the environment is **Ready**.

In rare cases, the provisioning process may fail. If you receive an email stating the reservation failed, try again by repeating Steps 1-3 for the environment that failed to provision. If issues continue, open an ITZ support ticket using the methods mentioned in the [Support](#) section of this guide.

When the reservations are in the **Ready** state, you can extend each reservation to a total of 6 days. Remember, IBM sellers need the environment to record their Stand and Deliver and Business Partners need an environment to answer quiz questions. Plan your time accordingly.

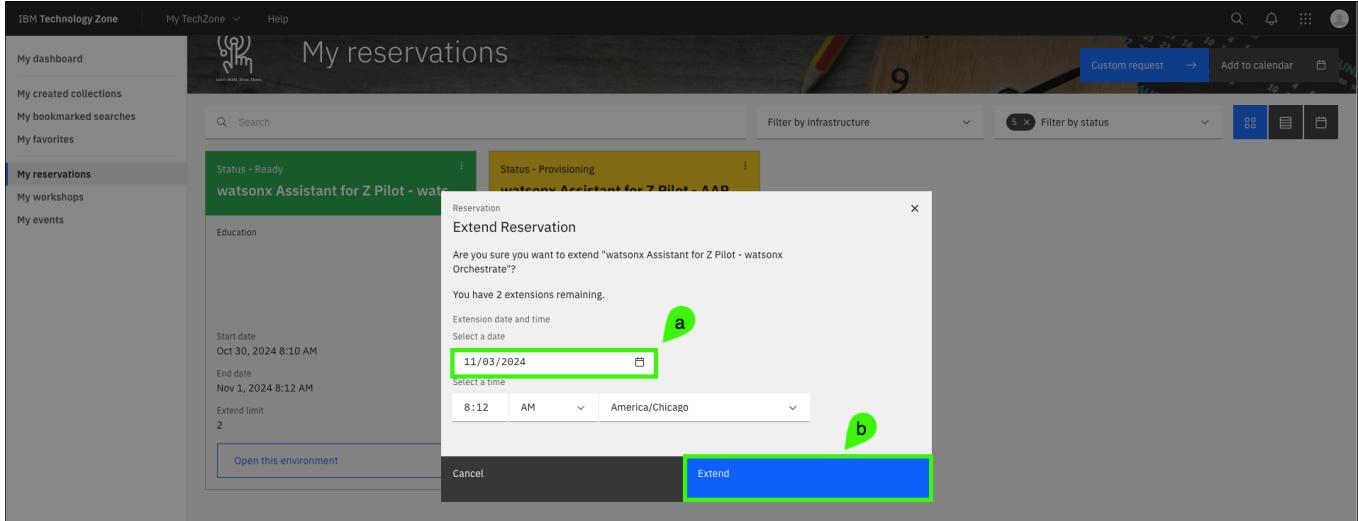
### 4. In the IBM Technology Zone portal, expand **My TechZone** at the top and select **My Reservations**.

The screenshot shows the IBM Technology Zone portal. The top navigation bar has 'IBM Technology Zone' on the left, 'My TechZone' with a dropdown arrow in the center, and 'Help' on the right. A search bar and a bell icon are also present. The left sidebar is expanded, showing 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', 'My reservations' (which is highlighted with a green box), 'My workshops', and 'My events'. The main content area has a 'Welcome to Technology Zone, Andrew' message. Below it is a 'Certified Base Images' section with an illustration of a person working on a computer. To the right is a large, stylized circular graphic with various colored dots and lines.

### 5. Click the overflow icon (≡) on the reservation tile and select **Extend**.

The screenshot shows the 'My reservations' page in the IBM Technology Zone portal. The left sidebar is expanded, showing 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', 'My reservations' (selected), 'My workshops', and 'My events'. The main content area displays two reservation cards. The first card for 'watsonx Assistant' is green and shows 'Status - Ready'. The second card for 'watsonx Assistant for Z Pilot - AAP...' is yellow and shows 'Status - Provisioning'. Both cards have a 'Reservation details' button. Below each card is a list of actions: 'View collection', 'Support', 'Extend' (which is highlighted with a green dashed box), 'Share', 'Transfer', 'Re-reserve', and 'Delete'. At the bottom of each card is a 'Open this environment' button. The top right of the page has a search bar, filter buttons for infrastructure and status, and a toolbar with various icons.

6. Click the **Select a date** option, (a) specify the date to extend to, and then (b) click **Extend**.

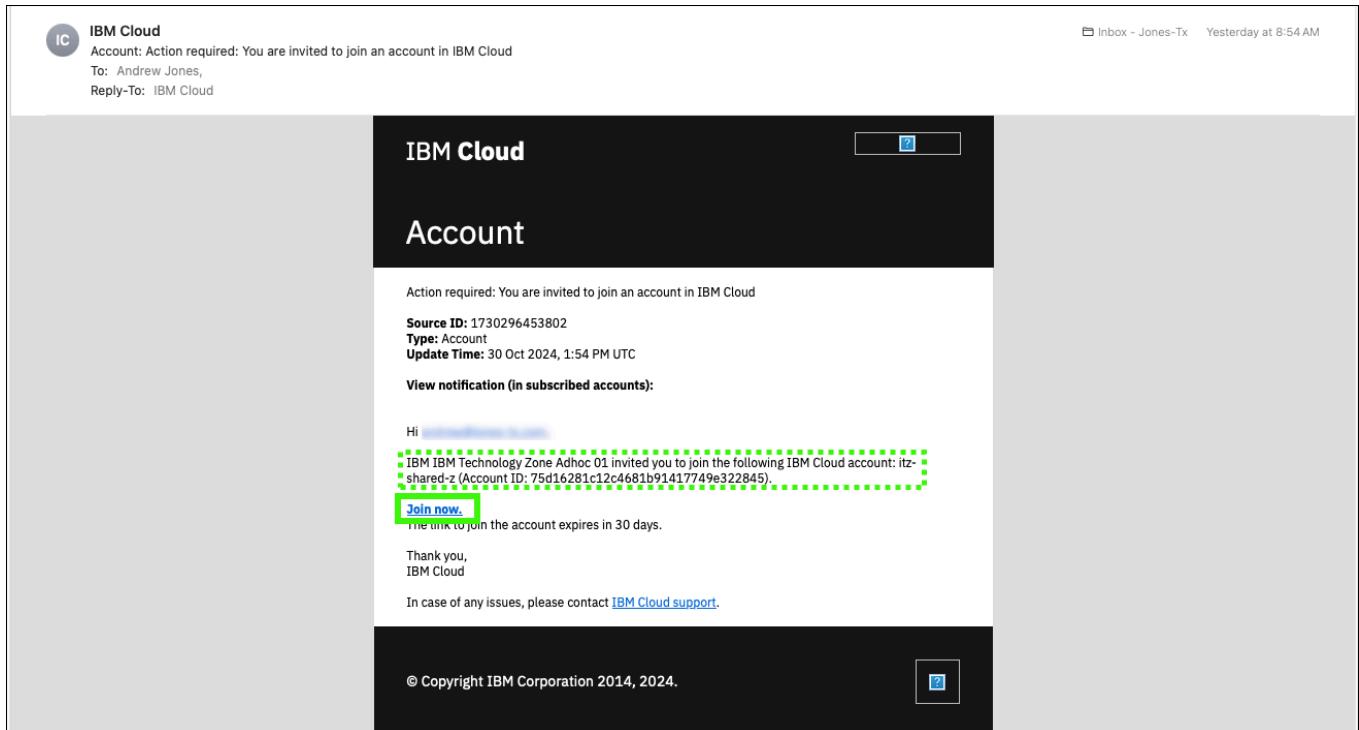


If you anticipate needing more time, repeat Steps 5 and 6 to extend the reservation to the maximum of 6 days.

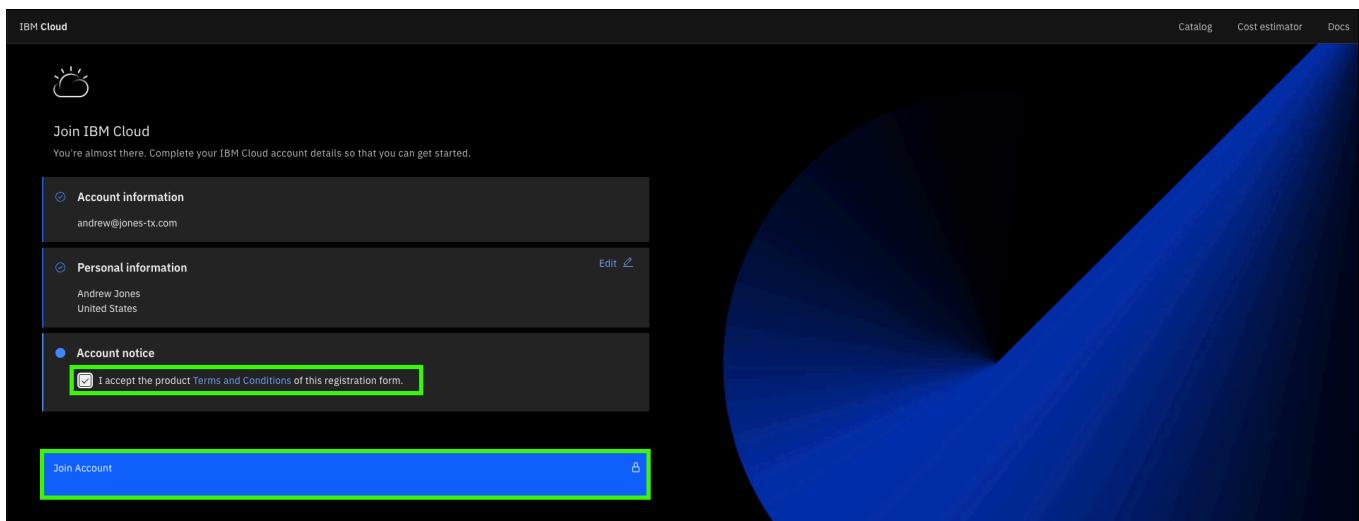
## Join the ITZ IBM Cloud accounts

Both the **watsonx Assistant for Z lab – watsonx Orchestrate** and the **Ansible Automation Platform (AAP) & z/OS** environments include adding you to an IBM Cloud account while your reservation is active. During the provisioning process of the ITZ environments, you should receive two emails. In order to access the environment, you must first accept the invitations to join both of the IBM Cloud accounts.

7. Open the emails from **IBM Cloud** and click the **Join now** links.



8. In the **Join IBM Cloud** browser windows that open, select the **I accept the product Terms and Conditions of this registration form**, and then click **Join Account\*\***.



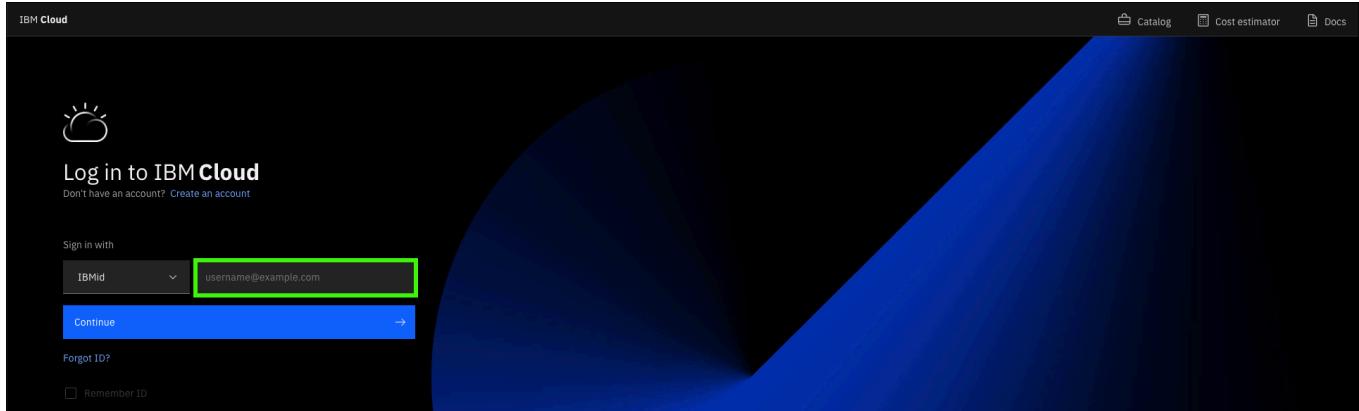
**Repeat steps 7 and 8 for the second invitation.**

After joining both accounts, verify both accounts appear in your available account list in the IBM Cloud portal.

9. Click the link below to open a browser to the IBM Cloud Portal.

### IBM Cloud portal

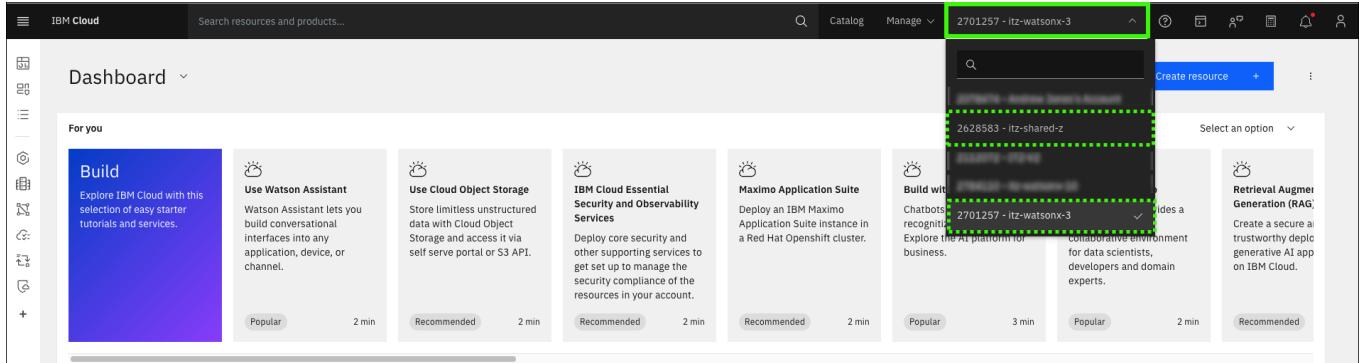
10. Follow the directions to complete the authentication to IBM Cloud using the same email address you used to login to ITZ. The login steps may vary depending on any two-factor authentication methods enabled.



11. Click the **account** menu and verify access to the two IBM Cloud accounts: **2701257 - itz-watsonx-3** and **2628583 - itz-shared-z**

 **These accounts may change within ITZ.**

Over time, the accounts may change for the environments. The accounts names should align with the accounts named in the invitation emails you received.



 Does your IBM Cloud portal view look different?

If your IBM Cloud portal looks different from the images above, it could be because the IBM Cloud portal has done through a design change, or your browser window is set to smaller size. Instead of the current selected account appearing in the top menu, you may see this **change account** icon:  Click this icon to view the list of accounts you can access.



## Accessing the environments

Each reservation provides access to its respective environment. Details for accessing each environment are provided in the **Pilot setup** sections that follow in the lab guide.

Proceed to the next section to perform the pilot setup steps.

## Pilot setup

# Creating an Assistant & configuring conversational search

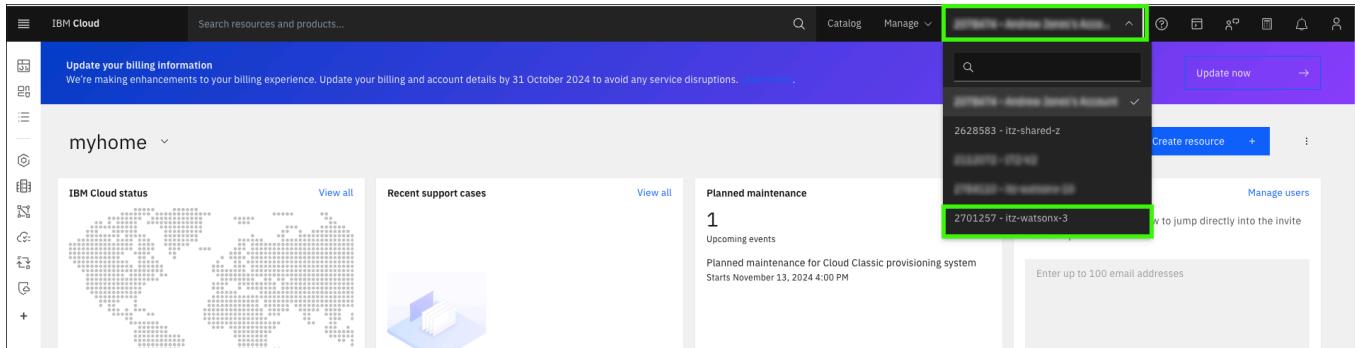
This section will cover how to begin using [watsonx Orchestrate](#) to create a new assistant for watsonx Assistant for Z and configure conversational search. You will be able to configure your assistant to use conversational search using a hosted [OpenSearch](#) instance. The pre-configured instance in IBM Technology Zone (ITZ) has over 220 knowledge sources and supports the Retrieval Augmented Generation (RAG) in which the Large Language Model (LLM) providing the conversational AI is augmented by this knowledge based on IBM Z documentation. All of which helps create IBM Z context-aware responses to queries with its content-grounded knowledge.

## Create your Assistant

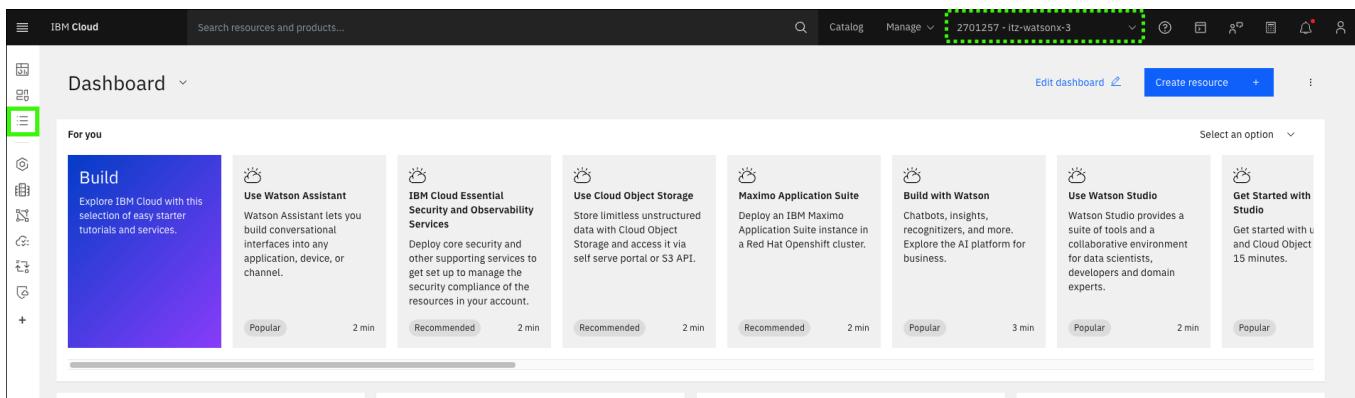
1. If not already open, click the link below to open a browser to the IBM Cloud portal and authenticate using your email address.

### [IBM Cloud portal](#)

2. Click the account menu and select the **2701257 - itz-watsonx-3** account.



3. Click the **resources** icon (≡).



4. Expand the **AI / Machine Learning** section and click the **watsonx Orchestrate** instance listed (the instance name will be different than shown in the image below).

Resource list

Name	Group	Location	Product	Status	Tags
itzwxo-2700039nft-erspw	watsonx-orchestrate-erspw	Dallas	watsonx Orchestrate	Active	-

## 5. Click Launch watsonx Orchestrate.

Resource list / itzwxo-2700039nft-erspw Active Add tags ↗

Manage Service credentials

Start by launching the tool

**Launch watsonx Orchestrate** Getting started tutorial ↗

Credentials

API key: [Download](#) [Show credentials](#)

URL: <https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/a7675d8e-e885-489f>

Plan Essentials Plan

## 6. Click the AI assistant builder tile to start creating a new assistant.

Welcome, Andrew Jones!

Take productivity to the next level.

Try Skills in Chat →

**AI assistant builder** Boost productivity and customer care by creating conversational experiences.

**Skill studio** Build the skills your team needs to get their work done more quickly.

**Automate how your business works** Standard plan | Skill studio Learn more →

## 7. Enter a name for your assistant and click Next.

Welcome to AI assistant builder

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  
Zeeves

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

Description (optional)  
Zeeves, the Jeeves for everything IBM Z.

40/128

Assistant language  
English (US)

This is the language your assistant will speak.

**Next**

## 8. Complete the **Personalize your assistant** form and click **Next**.

Explore the personalization options. When creating an assistant for a client pilot consider specifying attributes that align with the client's business.

- a. Select **Web**.
- b. Select the industry of your choice.
- c. Select the role of your choice.
- d. Select the need of your choice.

Welcome to AI assistant builder

Create    Personalize    Customize    Preview

**Personalize your assistant**

Tell us where your assistant will live  
You may add multiple channels from your dashboard.

Where do you plan on deploying your assistant?  
**a** Web

Tell us about yourself  
This information will be used to personalize your onboarding experience.

Which industry do you work in?  
**b** Software

What is your role on the team building the assistant?  
**c** Developer

Which statement describes your needs best?  
**d** I want to automate common tasks in a natural way

This is what your customers will experience

watsonx Assistant

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within 5 miles of you.

What size and color do you need?

I'm looking for a size 9 in white

Great news! The Speed Demons are available in white in a size 9.

You can purchase them for curbside pickup or we can ship them to you. Which would you prefer?

I'll pick them up!   Ship them to me!

Type something... ➤

**Next**

## 9. Complete the **Customize your chat UI** form and click **Next**.

Explore the customization options. When creating an assistant for a client pilot consider specifying attributes that align with the client (for example, colors and logos).

Welcome to AI assistant builder

Create    Personalize    Customize    Preview

### Customize your chat UI

Update the style to match your brand and your website. You can change these settings later. A developer can also add more advanced styling changes with code. [Learn more](#)

Assistant's name as known by customers: **Zeeves**

Intended purpose:  Standard: For virtual agents and customer support experiences.  Carbon for AI: For use in internal IBM products.

Choose a theme:  Light  Dark

Primary color: #FFFFFF Secondary color: #303030

Chat header:  User message bubble

Accent color: #035AE9

Significant and interactive objects:  On  Off

Size:  Width: 380px  Height: 640px

IBM Watermark:  Shade IBM Watermark  Off

Streaming:  Enable Streaming  Off

**Zeeves**

Hi! I'm a virtual assistant.  
How can I help you today?

Type something...

Powered by IBM watsonx

## 10. Preview your assistant and then click **Create**.

Welcome to AI assistant builder

Create    Personalize    Customize    Preview

### Preview your assistant

See what your assistant will look like as a chatbot on your website.

Certain settings do not work on this page and are disabled.

**Sample website**

Hi! I'm a virtual assistant.  
How can I help you today?

Type something...

Powered by IBM watsonx

At this point, the assistant has been created.

The screenshot shows the AI assistant builder interface for the 'Zeeves' assistant. The left sidebar has 'Generative AI' selected. The main area shows the 'Assistant architecture' diagram, which includes nodes for 'Default behavior', 'Actions', 'Fallback', and 'Search'. The 'Actions' node branches into 'General purpose', 'Conversational search', 'AI-guided', 'Skill-based', and 'Custom-built' categories. The 'Search' node is connected to the 'Conversational search' category.

## Configure conversational search

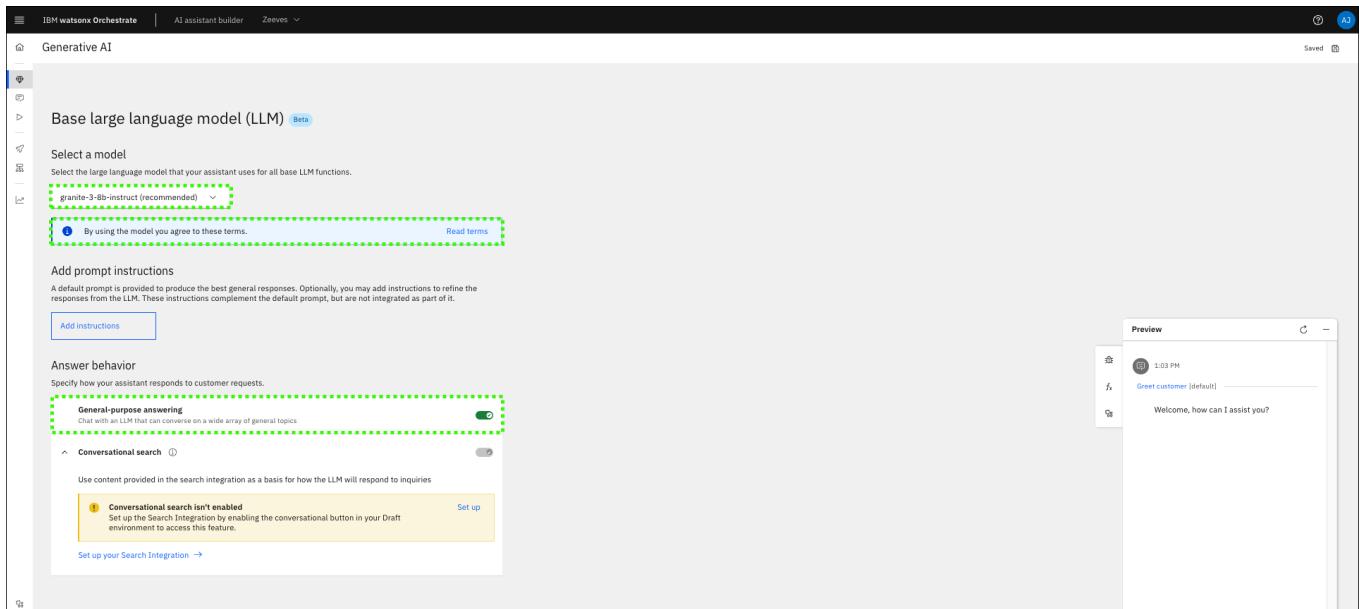
The next step will be to configure **conversational search** for your assistant using a hosted instance of OpenSearch.

10. Click **Generative AI** menu item (💡) in the left navigation.

This screenshot is identical to the previous one, showing the 'Generative AI' menu item highlighted in green. The rest of the interface and the 'Assistant architecture' diagram remain the same.

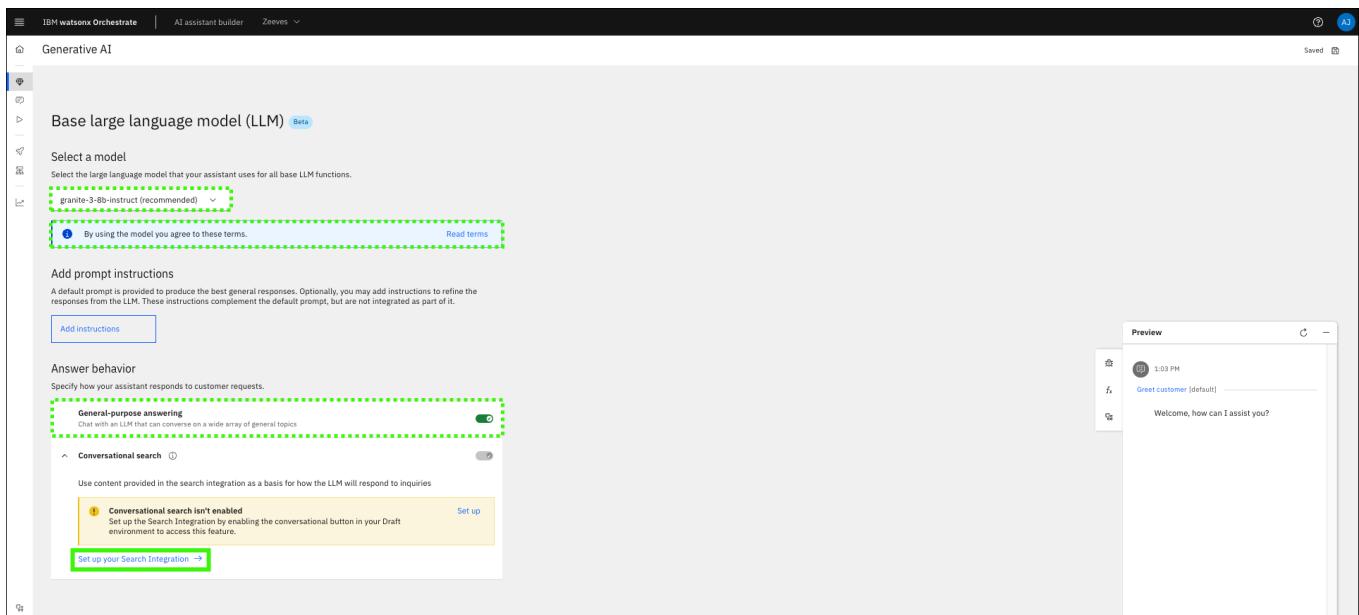
11. Review the base large language model (LLM) settings.

Notice the other LLM models available. For most pilots, the **granite-3-8b-instruct** model is appropriate.



## 12. Click Set up your Search Integration.

By default, conversational search is not enabled when an assistant is created. Conversational search will take priority over general-purpose answering if both are enabled. Learn more about conversational search in watsonx [here](#).



## 13. Click Custom service.

**14. Complete the **Custom service** form and then click **Next**.**

a. Select **By providing credentials**.

b. Enter the following value in the **URL** field (use the copy icon to avoid typographical errors).

**https://wxa4z-opensearch-wrapper-wxa4z-demo.wxo4z-opc-opensearch-clus-47e063e6a3ad1f71bf2e58f91c3b4c2e-0000.us-south.containers.appdomain.cloud/v1/query**

c. Select **None** in the **Choose an authentication type** drop-down list.

**15. Enable **conversational search** and then click **Save**.**

**16. Update the conversational search **custom service** settings based upon your requirements.**

Note: the **Settings** page is divided into two sections in the images below to enhance the visibility of the screen captures. Learn more about these settings [here](#).

The following settings have proven to work well. You can experiment with these settings to see how they affect queries for your client's pilot.

**a. Enable Conversational search.**

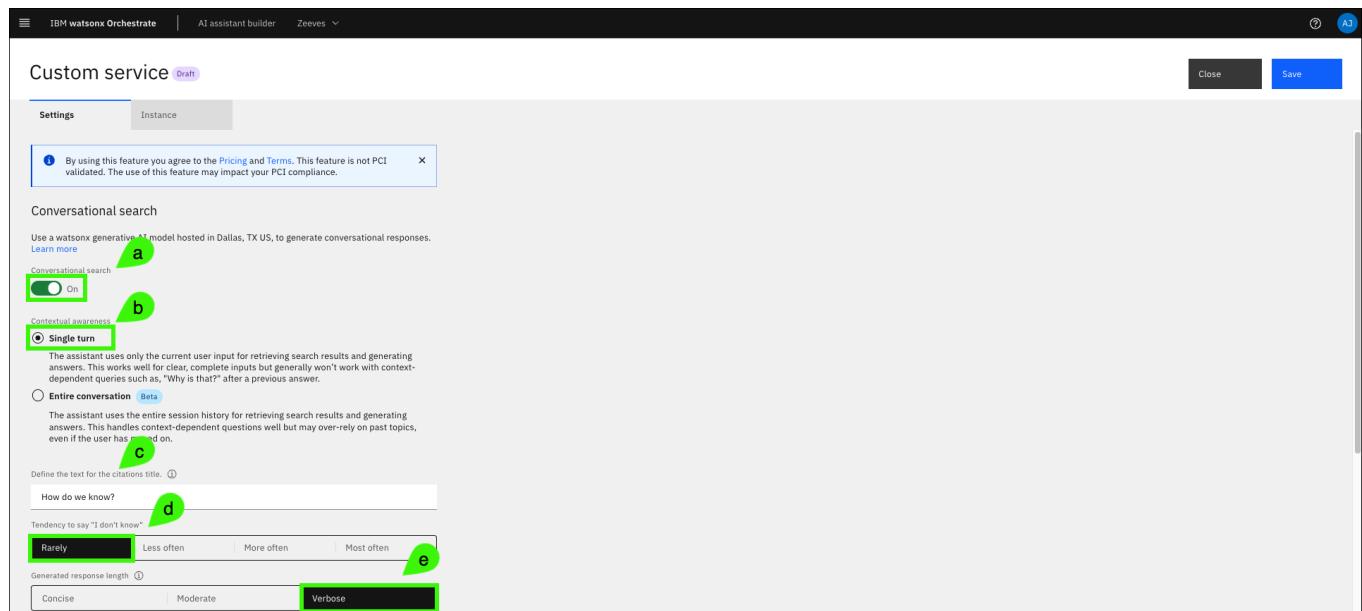
**b. Select Single turn.** Enabling multi-turn conversation (by selecting Entire conversation) is not yet supported for the solution on-prem. Please be mindful in using this option and ensure the client understands what is currently supported today by the solution.

**c. Specify the text appears to expand the list of citations in the assistant (except web chat client).**

**d. Select Rarely for the tendency to say "I don't know" setting.**

**e. Select Verbose for the generated response length.** This setting affects the average response length.

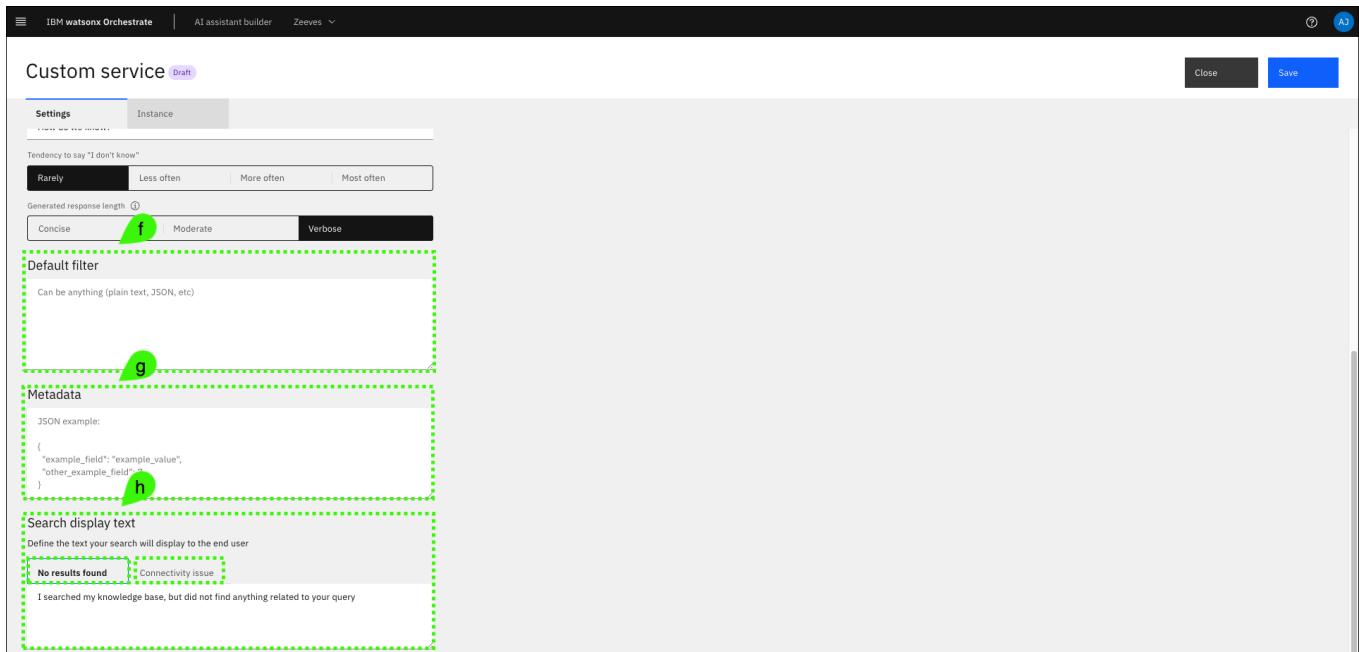
Depending on user input, variations from the selected length may occur.



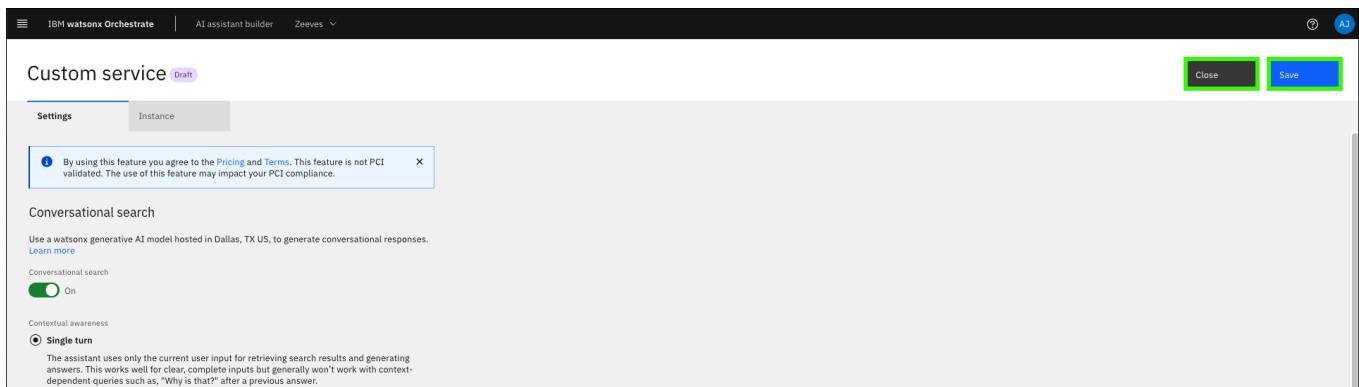
**f. Leave the Default filter field empty.**

**g. The Metadata field provides a way to adjust your assistant's behavior during conversational search for your OpenSearch instance. This option will be explored in detail in the Deploy a dedicated OpenSearch instance for document ingestion section. Leave the field empty for now.**

**h. The Search display text options specify the default text displayed when no results are found or when there are connectivity issues to the backend search service. You can keep the defaults or customize.**



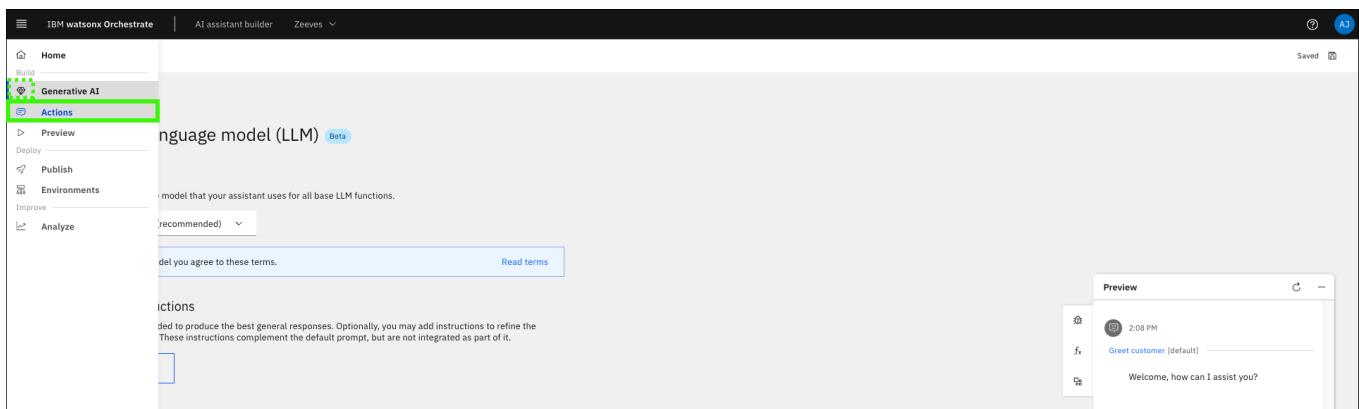
## 17. Click **Save** and then click **Close**.



## Additional configuration

Once you have saved and closed the **Conversational search** configuration page, there are a few more configurations needed to get the best experience from your conversational chat. Details on these settings are available [here](#).

## 18. Hover over the **Generative AI** icon (💡) in left navigation and click **Actions**.



19. Click **Set by assistant** under the **All items** menu.

Create your first action  
With actions, you can help your customers accomplish their goals.  
Create action +

20. Click **no matches**.

Name	Last edited	Examples Count	Status
Greet customer	3 hours ago		green
Trigger word detected	3 hours ago		green
No matches	3 hours ago		green
Fallback	3 hours ago		green

21. Click **Step 1** under **Conversation steps**.

22. Select (a) **without conditions** in the **Is taken** drop-down menu and then click (b) **Clear conditions**.

Note, the **Is taken** value does not change from **with conditions** after selecting **without conditions**.

a

Step 1

Is taken **with conditions**

b

Clear conditions?

Are you sure you want this step taken without conditions? All conditions and condition groups will be deleted.

Cancel **Clear conditions**

23. Delete the default text in the **Assistant says** entry field.

The screenshot shows the AI assistant builder interface. On the left, there's a sidebar with 'Conversation steps' containing two items: '1 This step has no content' and '2 This step has no content'. Step 1 is selected. The main panel shows 'Step 1' with 'Is taken' set to 'without conditions'. Under 'Assistant says', there is a text area with placeholder text: 'For example: Please select from the following options:'. Below it is a 'Define customer response' section. The 'And then' section contains a single option: 'End the action'.

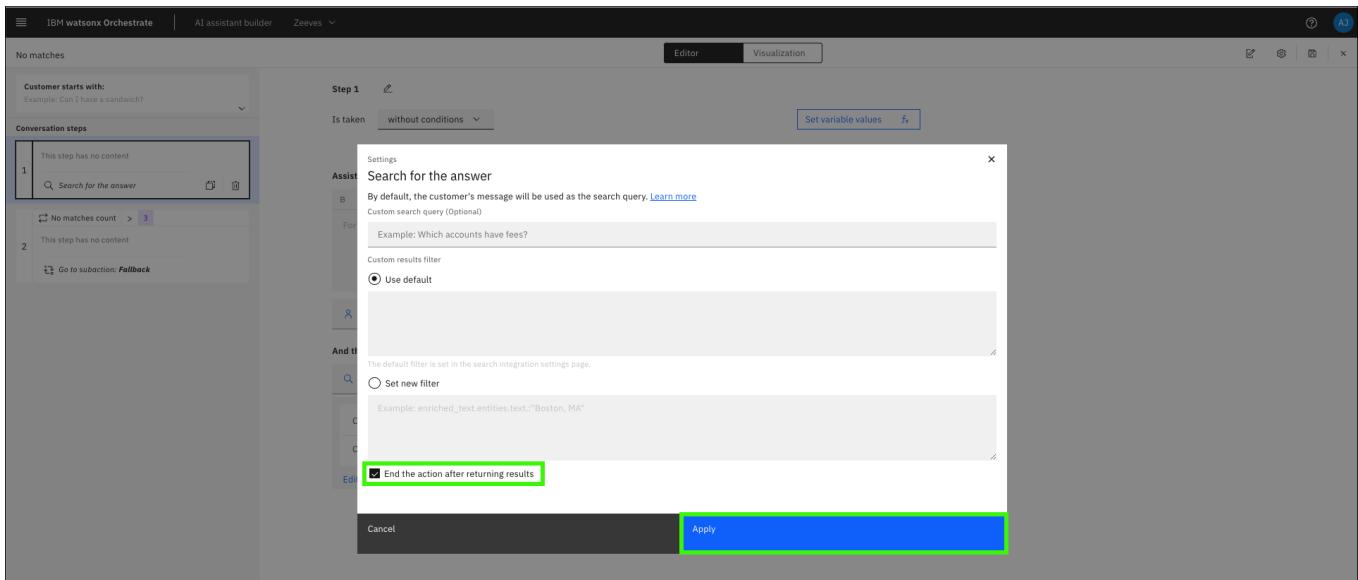
#### 24. Select **Search for the answer** in the **And then** drop-down menu.

The screenshot shows the same AI assistant builder interface as above, but the 'And then' dropdown menu is open. The 'Search for the answer' option is highlighted with a green border. Other options in the menu include 'Continue to next step', 'Re-ask previous step(s)', 'Go to a subaction', 'Use an extension', 'Connect to agent', and 'End the action'.

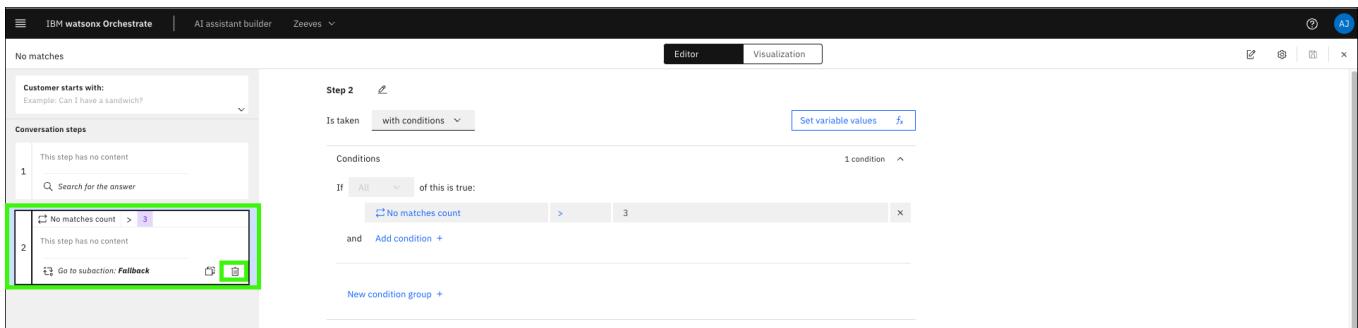
#### 25. Click **Edit settings**.

The screenshot shows the AI assistant builder interface with the 'And then' dropdown open. The 'Search for the answer' option is still highlighted. In the 'Custom query' field, 'None (Customer's message will be the query)' is selected. In the 'Custom filter' field, 'None (Optional)' is selected. The 'Edit settings' button is highlighted with a green border.

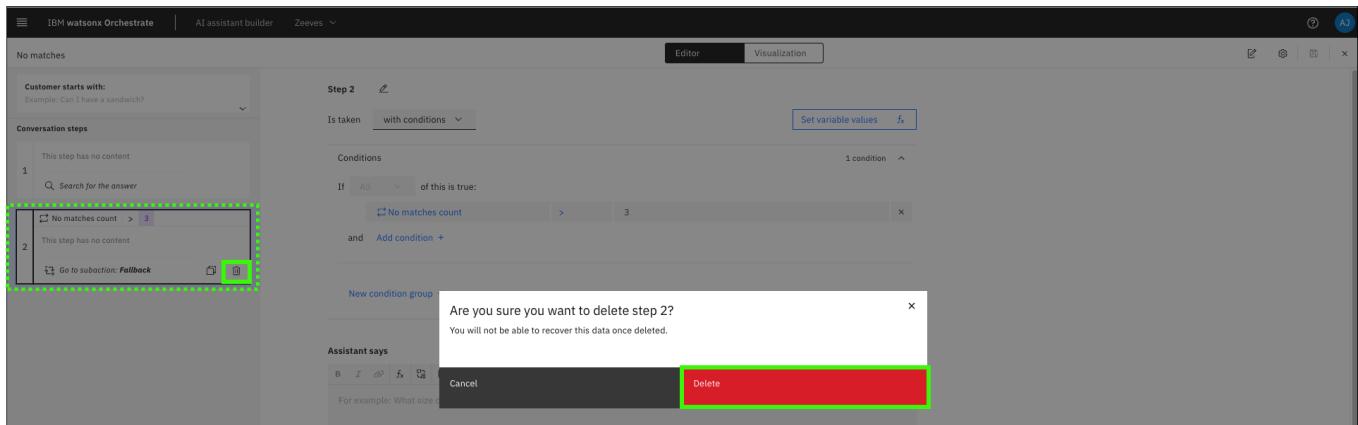
#### 26. Select **End the actions after returning results** and then click **Apply**.



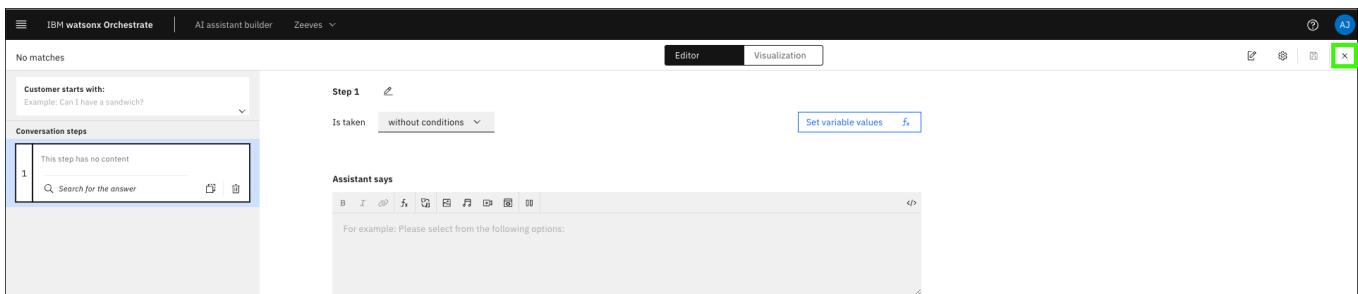
27. Select Step 2 (No matches count) under **Conversation steps** and click the delete icon (>Delete).



28. Click **Delete** in the confirmation dialog to delete step 2.



29. Click the **x** to close the **Editor** window.



### 30. Click Fallback in the Actions table.

Name	Last edited	Examples Count	Status
Greet customer	3 hours ago	1	Green
Trigger word detected	3 hours ago	1	Green
No matches	a minute ago	1	Green
<b>Fallback</b>	3 hours ago	1	Green

### 31. Delete all of the Conversation steps.

Note: the image below has been edited. Only 5 steps are show, but all 6 need to be deleted. You will need to select each step individually, click the delete icon (), and confirm the deletion.

### 32. Verify all Conversation steps are deleted and then click the x to close the Editor window.

## Troubleshooting

The following are issues you may encounter. If the provided resolutions do not work, contact support using the methods mentioned in the [Support](#) section of this guide.

 **Assistant responds to all prompts with, "I might have information related to your query to share, but am unable to connect to my knowledge base at the moment"** 

This Assistant is unable to connect to the custom service URL specified. This could be a network issue, the service may be down, the service may be restarting, or the service is no longer running at that URL.

Before reaching out to [Support](#), try the following:

- Wait a few minutes and try again. It may be the service was in the process of restarting.
- If you printed this demonstration guide or saved a copy, verify you are using the most current version of the [lab guide](#) and the correct service URL (<https://wxa4z-opensearch-wrapper-wxa4z-demo.wxo4z-opc-opensearch-clus-47e063e6a3ad1f71bf2e58f91c3b4c2e-0000.us-south.containers.appdomain.cloud/v1/query>). The URL may have changed since you saved or printed the lab guide.

# Next steps

This IBM watsonx Assistant for Z for Technical Sales Level 4 demonstrated several of the IBM watsonx Assistant for Z capabilities. However, there is still more to learn about IBM watsonx Assistant for Z. Be sure to check out the [offering landing page](#) and the [product documentation](#).

Also, the focus of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide was the *end-user* use of IBM watsonx Assistant for Z. To learn more about deploying, configuring, and customizing IBM watsonx Assistant for Z explore the other capabilities that are included in the [ITZ collection](#) [here](#). Included are guidance for running client pilots and the ability to manage an IBM watsonx Assistant for Z deployment. In the Velocity Pilot environment, you can explore all the capabilities of the offering like creating an assistant, importing documents, and adding automation skills.

## Earn the badge

Finally, remember to complete the IBM watsonx Assistant for Z for Technical Sales Level 4 learning plan to earn the IBM watsonx Assistant for Z Technical Sales Advanced badge.

**IBM technical sellers** must complete a Stand and Deliver exercise to validate their ability to demonstrate IBM watsonx Assistant for Z to potential clients. Refer to the evaluation checklist in the [YourLearning learning plan](#) for the Stand and Deliver.

**Business Partners** must pass the IBM watsonx Assistant for Z for Technical Sales Level 4 quiz that is located in the [IBM Training learning plan](#). The Business Partner quiz verifies use of the demonstration environment and click-through demonstrations, and not one's general knowledge of the offering.