

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 uses the [IBM watsonx Assistant for Z Velocity collection](#) and the three Velocity Pilot lab environments in IBM Technology Zone (ITZ).

The lab guide also enables dedicated lab environments for customized client PoXs 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 the following 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 such as a site or service not being available:

- [IBM Technology Zone status](#)

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 ticket system](#)
- Email: 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 that are related to the software as a service (SaaS) instance of watsonx Orchestrate
- Email: andrewj@us.ibm.com and maxwell.g.weiss@ibm.com

Business Partners, 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.

Reserve the IBM Technology Zone environment

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

Welcome

Reserve the IBM Technology Zone environment

Pilot setup

Next steps

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, $\text{[} \wedge \text{Ctrl} \text{]} + \text{[V]}$ 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, tend to use 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 Lab Guide table of contents

This **Demonstration Guide** uses a responsive browser-based interface to ensure 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 for the "IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide". The title bar includes the course name and a search bar. On the left, a green dashed box highlights the "Table of Contents" sidebar, which lists various sections like Welcome, Guidance for delivering a demonstration, Reserve the IBM Technology Zone environment, etc. The main content area displays the "Welcome" page, which introduces the course goal and provides an overview of its content.

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

The screenshot shows the same browser window after the main menu icon was clicked. The sidebar is now collapsed, and the main content area displays the "Welcome" page. A callout at the bottom left instructs the user to click the main menu icon to expand the table of contents.

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 obtain the IBM watsonx Assistant for Z Technical Sales Advanced badge.

IBM Technology Zone environment

To enable sellers to learn how to deliver client pilots of IBM Watsonx Assistant for Z, multiple environments are available in IBM Technology Zone (ITZ). The following environments are used for the Watsonx Assistant for Z Velocity lab environment and can be found in the [IBM Watsonx Assistant for Z collection](#):

- **Watsonx Assistant for Z lab – Watsonx Orchestrate:** a dedicated environment with Watsonx Orchestrate on IBM Cloud that is used for creating and configuring the assistant, configuring conversational search, importing skills, and configuring actions.
- **Ansible Automation Platform (AAP) & z/OS:** a pre-configured instance of AAP and Wazi z/OS. The environment includes preinstalled Ansible playbooks that can be imported as skills within Watsonx Orchestrate and connected to your assistant. The environment provides preinstalled templates for various use cases that are covered in a later section. Learn more about AAP [here](#). Learn more about Wazi, [here](#).
- **Single Node OpenShift with NFS storage:** used to provision a single-node Red Hat OpenShift cluster (SNO) on IBM Cloud. The cluster is used to install a dedicated instance of [OpenSearch](#) for Watsonx Assistant for Z. This environment enables ingestion of client-supplied documents.



All activities in this lab guide are required.

While all three environments may not be required for every client pilot, to complete the Level 4 learning plan and earn the IBM Watsonx Assistant for Z Technical Sales Advanced badge, you must provision all three ITZ environments and complete all sections in the lab guide. **Any statements in the ITZ collection regarding optional environments or tasks should be ignored.**

Follow the instructions in to create new reservation requests, extend the reservations, and access the ITZ demonstration environments. Provisioning the SNO environment in ITZ can take several hours, while the other two environments typically provisioning in under 30 minutes.

Create a reservation request

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

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

 The next two steps are for one of the three environments. Repeat for all three environments.

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

2. Select Reserve now.

The **Reserve now** option creates a reservation for immediate use. Optionally, schedule the reservation for a later date, for example, when you are at your client's office to start a pilot.



The screenshot shows the 'Create a reservation' interface. At the top, there are four tabs: 'Select a environment/infrastructure', 'Select a reservation type', 'Fill out your reservation', and 'Complete'. Below these tabs, there is a section titled 'Single environment reservation options:' with two radio buttons: 'Reserve now' (which is selected and highlighted with a green box) and 'Schedule for later'.

3. Complete the reservation request form and then click Submit.

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

- a.** Name: specify a name for the reservation (optional).
- b.** Purpose: select the **Education** purpose tile.



For client pilots...

For client pilots, set the **Purpose** field in the reservation to **Pilot** and provide an opportunity number to receive a longer reservation.

- c.** Purpose description: enter a description, for example: Level 4 education.
- d.** Preferred geography: select the region nearest to your physical location for improved performance and reduced network latency.
- e.** End date and time: the initial maximum will be set to two days after the current date and time. Instructions follow to extend the reservation end date.
- f.** Accept the IBM Technology Zone's terms and conditions and security policies.
- g.** Click **Submit**.

Create a reservation

IBM Watsonx Assistant for Z

Name a

Select a reservation type b

Purpose c

Sales Opportunity number d

Preferred Geography e

End date and time f

Notes

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

Submit

In addition to the preceding fields, the reservation for the **Single Node OpenShift with NFS storage** has these additional fields:

- h. OCP/Kubernetes cluster network: leave the default setting of **10.128.0.0/14**.
- i. Enable FIPS security: leave the default setting of **No**. Learn more about the Federal Information Processing Standards (FIPS) [here](#).
- j. Master single node flavor: select **16 vCPU x 64 GB - 300 GB ephemeral storage**.
- k. OpenShift version: select **4.14**.
- l. OCP/Kubernetes service network: leave the default setting of **172.30.0.0/16**.
- m. Accept the IBM Technology Zone's terms and conditions and security policies.
- n. Click **Submit**.

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 (h)

Enable FIPS Security: No (i)

Master Single Node Flavor: 16 vCPU x 64 GB - 300 GB ephemeral storage (j)

OpenShift Version: 4.14 (k)

OCP/Kubernetes Service Network: 172.30.0.0/16 (l)

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](#) (m)

Submit (n)

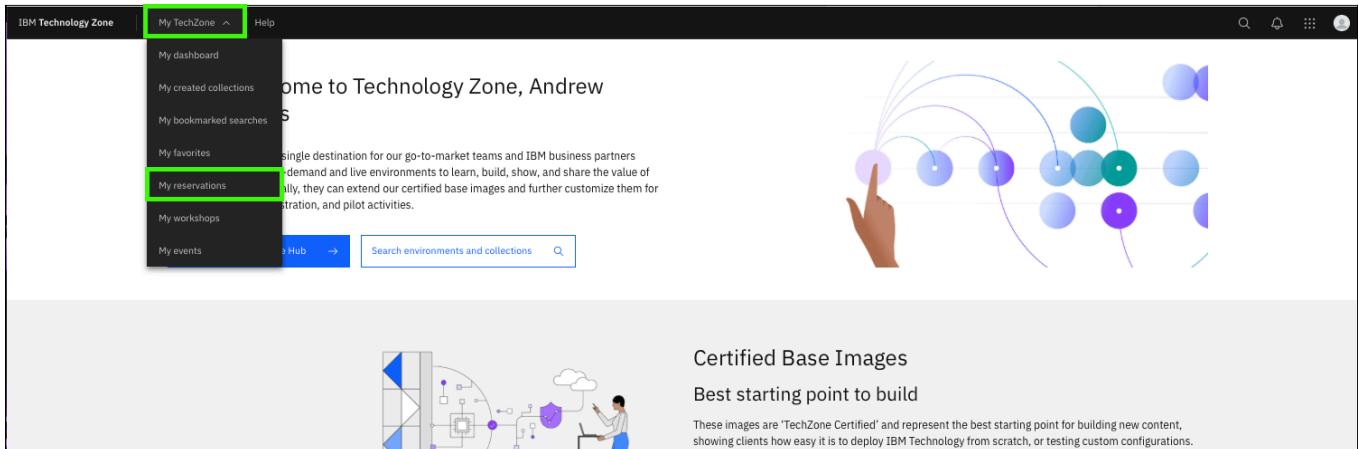
During the provisioning process, multiple emails are sent to you from ITZ as the provisioning process runs. One email states the reservation is provisioning and the other email states that the environment is **Ready**.

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. In addition, review the [Troubleshooting](#) section that follows. If issues continue, open an [ITZ support ticket](#) by using the methods that are mentioned in the [Support](#) section.

Extend the reservation

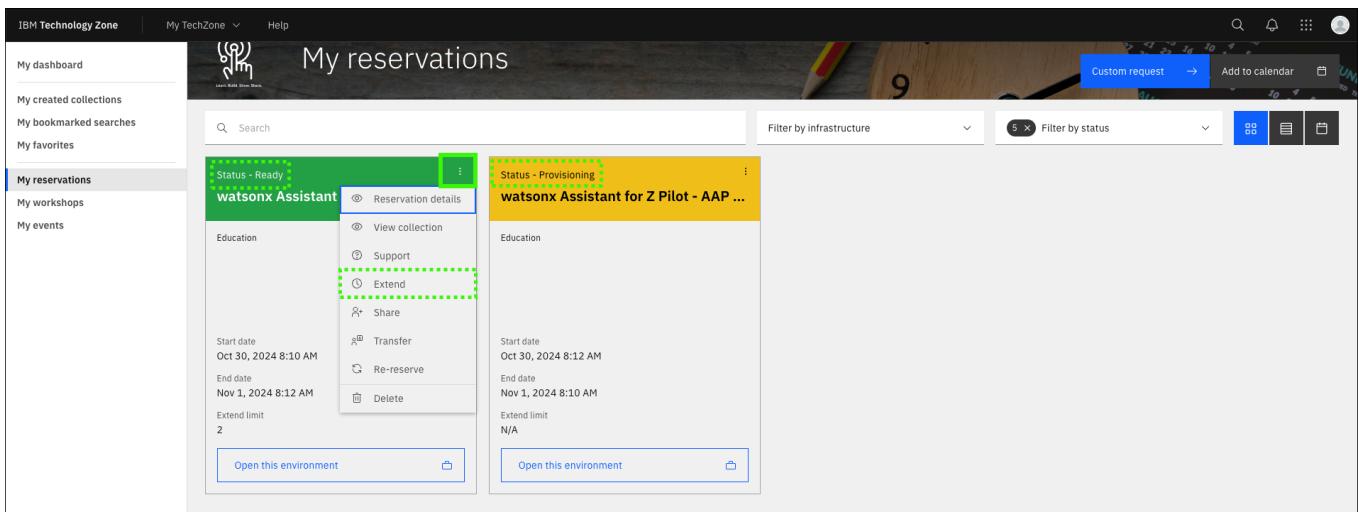
When the reservations are in the **Ready** state, you can extend each reservation to a total of six days.

1. In the IBM Technology Zone portal, expand **My TechZone** and select **My Reservations**.



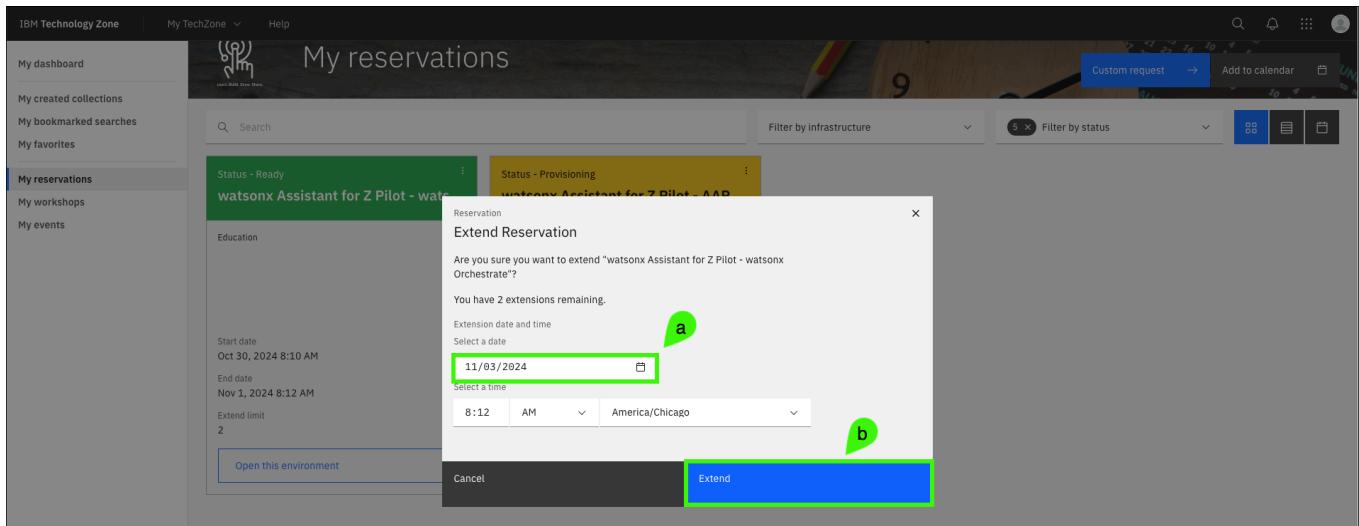
The screenshot shows the IBM Technology Zone portal. At the top, there's a navigation bar with 'IBM Technology Zone', 'My TechZone ▾', and 'Help'. Below the navigation is a sidebar with links: 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', 'My reservations' (which is highlighted with a green box), 'My workshops', and 'My events'. The main content area has a heading 'Welcome to Technology Zone, Andrew' and a graphic of a hand pointing at a network of nodes. Below this is a section titled 'Certified Base Images' with a sub-section 'Best starting point to build' and a note about TechZone Certified images.

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



The screenshot shows the 'My reservations' page. The left sidebar is identical to the previous screenshot. The main area displays two reservation cards. The first card, for 'watsonx Assistant', is in 'Status - Ready' and has an 'Extend' option in its context menu. The second card, for 'watsonx Assistant for Z Pilot - AAP ...', is in 'Status - Provisioning'. Both cards show start and end dates, extend limits, and 'Open this environment' buttons.

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



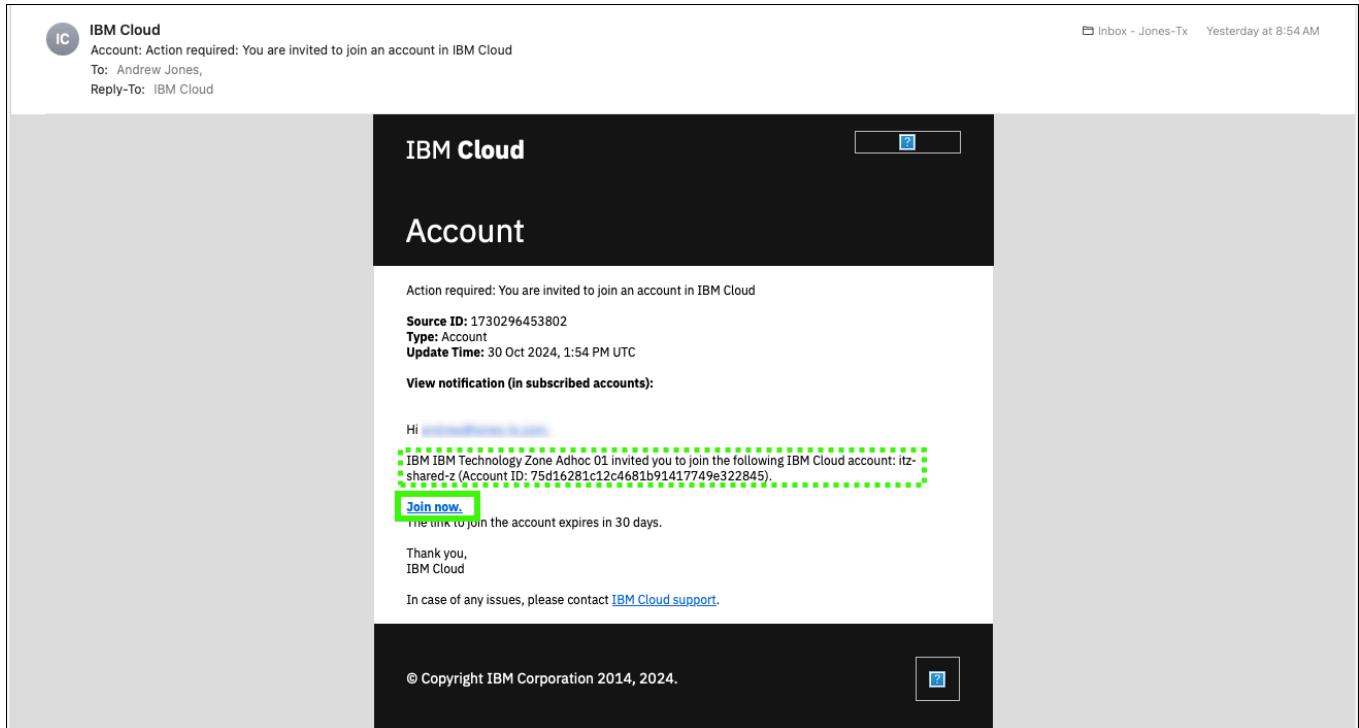
If you anticipate needing more time, repeat Steps 5-6 to extend the reservation to the maximum of six days. Repeat these steps for the other two reservations.

Join the ITZ IBM Cloud account

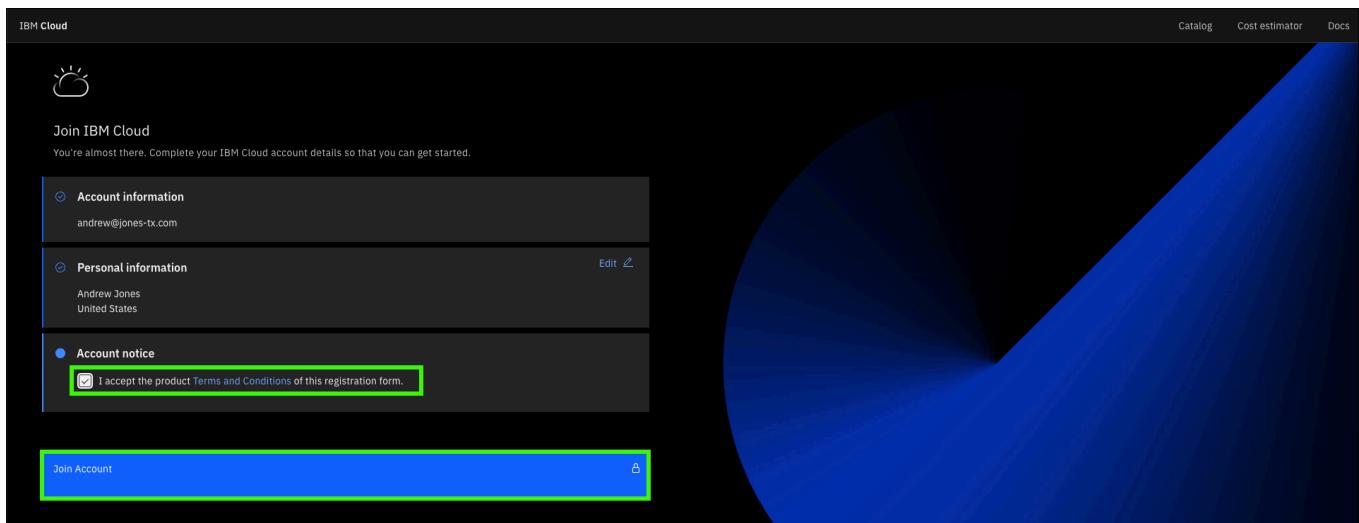
Both the **watsonx Assistant for Z lab – watsonx Orchestrate** and the **Ansible Automation Platform (AAP) & z/OS** environments add you to an IBM Cloud account while your reservation is active. During the provisioning process of these **ITZ** environments, you receive two emails from IBM Cloud.

You only need to accept the invitation to the **watsonx Assistant for Z lab – watsonx Orchestrate** environment.

1. Open the email from **IBM Cloud** and click the **Join now** links.



2. In the **Join IBM Cloud** browser window that opens, select the **I accept the product Terms and Conditions** of the registration form, and then click **Join Account**.

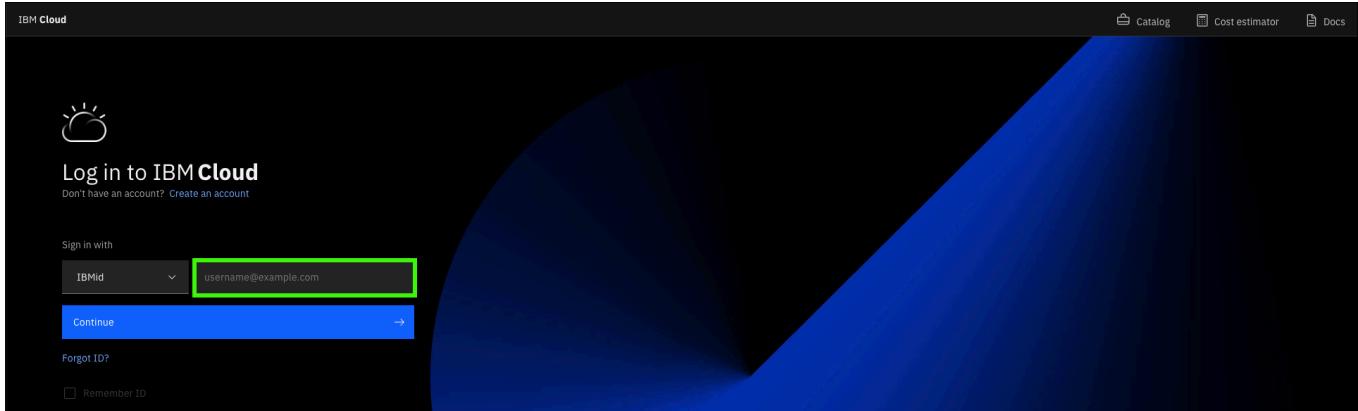


After joining the account, verify that the account appears in your available account list in the IBM Cloud portal.

- Click the following link to open a browser to the IBM Cloud portal.

IBM Cloud portal

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



- Click the **account** menu and verify access to the IBM Cloud account listed in your ITZ reservation.

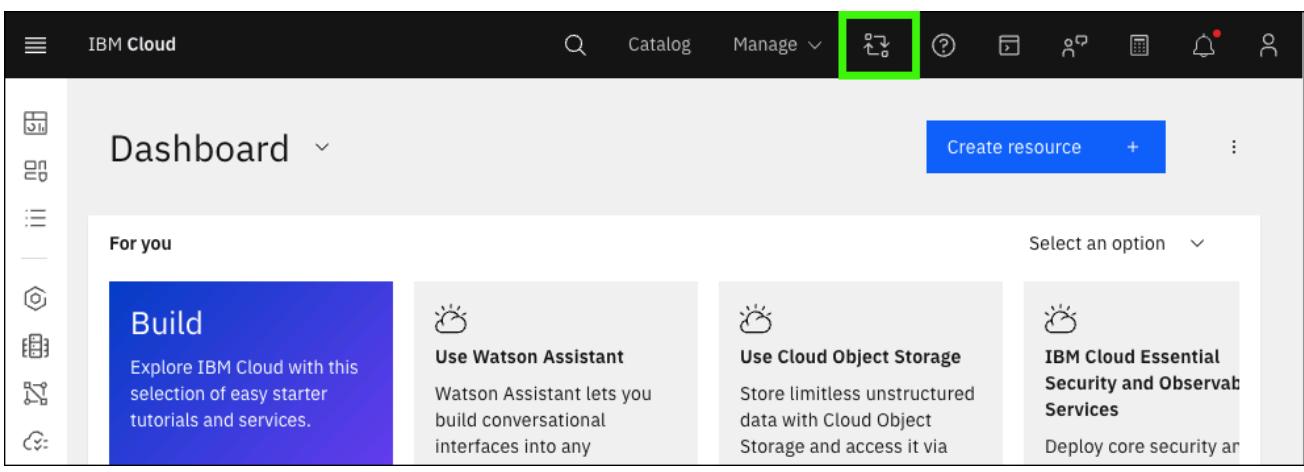


The account may change within ITZ.

Over time, the account may change for the environments. The account names should align with the account named in the invitation email 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 gone 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.

After all three reservations are in the **Ready** state and you accept the invitations to the IBM Cloud accounts, proceed to the next section to complete the pilot setup.

Troubleshooting

 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**.

Pilot setup

Creating an assistant and configuring conversational search

You use [watsonx Orchestrate](#) to create the assistant and configure conversational search. You can configure your assistant to use conversational search by using a hosted [OpenSearch](#) instance. The pre-configured instance in IBM Technology Zone (ITZ) has over 220 knowledge sources and supports Retrieval Augmented Generation (RAG). The large language model (LLM) providing the conversational AI augments this knowledge based on IBM Z documentation. All of these elements create IBM Z context-aware responses to queries with its content-grounded knowledge.

Access the ITZ IBM Cloud account for the watsonx Assistant for Z Pilot environment

1. In the IBM Technology Zone portal, expand **My TechZone** and select **My Reservations**, or click the following link.

ITZ My reservations

Welcome to Technology Zone, Andrew

Single destination for our go-to-market teams and IBM business partners to find and use certified base images and environments to learn, build, show, and share the value of IBM Z. Additionally, they can extend our certified base images and further customize them for their specific needs, such as for testing, demonstration, and pilot activities.

Certified Base Images

Best starting point to build

These images are 'TechZone Certified' and represent the best starting point for building new content, showing clients how easy it is to deploy IBM Technology from scratch, or testing custom configurations.

2. Click the **watsonx Assistant for Z Pilot - watsonx Orchestrate** tile.

Status	Name	Description
Ready	watsonx Assistant for Z Pilot - AAP & z/OS	Education
Ready	watsonx Assistant for Z Pilot - watsonx O...	Education
Ready	Single Node OpenShift (VMware on IBM C...	Education

3. Record the ITZ IBM Cloud account name associated with the reservation.

Purpose

- Purpose
- Education
- Opportunity Product(s)
- Customer(s)

Environment

Reservation ID	Type
672a09a1a8f85062f891e081	IBM Cloud
Request method	Transaction ID
watsonx-orchestrate	115897c9-58a1-4f17-af9c-b16dc2a97590
ITZ-WATSONX-036	Geo
Region	americas
us-south	Datacenter
Customer data	dal10
false	Environment
Idle runtime limit	watsonx-orchestrate-wusdf
10800	Timeout action

Reservation Details

IBM Cloud Login
<https://icloud.ibm.com/resources>

4. Click the IBM Cloud Login link.

Purpose

- Purpose
- Education
- Opportunity Product(s)
- Customer(s)

Environment

Reservation ID	Type
672a09a1a8f85062f891e081	IBM Cloud
Request method	Transaction ID
watsonx-orchestrate	115897c9-58a1-4f17-af9c-b16dc2a97590
Cloud Account	Geo
ITZ-WATSONX-036	americas
Region	Datacenter
us-south	dal10
Customer data	Environment
false	watsonx-orchestrate-wusdf
Idle runtime limit	Timeout action
10800	

Reservation Details

IBM Cloud Login
<https://icloud.ibm.com/resources>



Steps to authenticate to IBM Cloud are not illustrated here.

You may need to authenticate to IBM Cloud after clicking the link. These steps are not shown here as they may vary by individual.

5. Verify that the current IBM Cloud account is the same as the account name recorded in step 3. If the account is not the same, switch to the proper account.

Note: The formatting of the name can appear differently than what is shown in the ITZ reservation.

The screenshot shows the IBM Cloud Resource list interface. At the top right, there is a dropdown menu labeled "2953593 - Itz-watsonx-036". This dropdown is highlighted with a green box. Below the dropdown, there is a "Create resource" button.

If the proper account is not listed, click the account drop down and select the proper account.

Note: If your browser window is narrow, the account drop down can be depicted with the Switch Account icon ().

This screenshot is similar to the one above, but the browser window is narrower. The account dropdown menu "2953593 - Itz-watsonx-036" is highlighted with a green box, demonstrating how it appears when the window is small.

Create your Assistant

1. Click the **Resources** icon ().

The screenshot shows the IBM Cloud Dashboard. On the left side, there is a vertical sidebar with various icons. The "Resources" icon (represented by three horizontal lines) is highlighted with a green box. The main area of the dashboard displays several cards under sections like "For you" and "Build".

2. Expand the **AI / Machine Learning** section and click the **watsonx Orchestrate** instance listed (the instance name is different than shown in the following image).

The screenshot shows the IBM Cloud Resource list interface. On the left, there's a sidebar with various icons for Compute, Containers, Networking, Storage, Converged Infrastructure, Enterprise applications, AI / Machine Learning, Analytics, Blockchain, and Databases. The 'AI / Machine Learning' section is currently selected and expanded, showing one item: 'itzwxo-2700039nft-erspw'. This item is highlighted with a green border. The main table has columns for Name, Group, Location, Product, Status, and Tags. The resource details show it is located in Dallas, part of the 'watsonx-orchestrate-erspw' group, using the 'watsonx Orchestrate' product, and is active.

3. Click Launch watsonx Orchestrate.

This screenshot shows the details page for the resource 'itzwxo-2700039nft-erspw'. It includes tabs for Details and Actions. The Manage section contains service credentials. The Start by launching the tool section features a prominent 'Launch watsonx Orchestrate' button, which is highlighted with a green border. Below it is a 'Getting started tutorial' button. The Plan section indicates an 'Essentials Plan'. The Credentials section displays an API key and a URL.

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

This screenshot shows the IBM Watsonx Orchestrate dashboard. It features a central graphic of a hand pointing upwards towards a cluster of colored circles. Below this are three main tiles: 'Build', 'AI assistant builder', and 'Skill studio'. The 'AI assistant builder' tile is highlighted with a green border. The 'Build' tile has a 'Try Skills in Chat' button. The 'Skill studio' tile has a 'Standard plan | Skill studio' link and an 'Automate how your business works' section with a 'Learn more' button.

5. Enter a name and optional description for your assistant and click Next.

Welcome to AI assistant builder

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

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

Assistant language: English (US)

Next

6. Complete the **Personalize your assistant** form and click **Next**.

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

- Select **Web**.
- Select the industry of your choice.
- Select the role of your choice.
- Select the need of your choice.

Welcome to AI assistant builder

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**

7. 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 #30303D

Chat header #035AE9 User message bubble

Accent color #035AE9

Significant and interactive objects

Size
 The size of the web chat on this page will not change by updating these fields.

Width 380px Height 640px

IBM Watermark
Enable IBM Watermark
 On

Streaming
Enable Streaming
 Off

Zeeves

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

Example: Find nearby location
Example: Check account balance
Example: See how I can help

Type something...
Powered by IBM Watsonx

8. 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.

[Copy link to share](#) [Change layout](#) [Customize web chat](#)

Sample website

Zeeves

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

Example: Find nearby location
Example: Check account balance
Example: See how I can help

Type something...
Powered by IBM Watsonx

The assistant is now created.

Configure conversational search

In the next steps you will be to configure **conversational search** for your assistant that uses a hosted instance of OpenSearch.

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

2. 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.

3. Click Set up your Search Integration.

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

4. Click Custom service.

5. Complete the **Custom service (a-c)** form and then click **Next (d)**.

a. Select **By providing credentials**.

b. Enter the following value in the **URL** field (use the copy icon to avoid typographical errors). This is the **URL** for the a shared **OpenSearch** instance. In later sections you will created and customize a dedicated instance.

```
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.

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

7. Update the conversational search **custom service** settings based on your requirements.

Note: The **Settings** page is divided into two sections in the following images to enhance the visibility of the screen captures.

Learn more about these **custom service** settings [here](#).

The following settings are 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-premises. Be mindful in using this option and help ensure that the client understands what is supported in the solution.

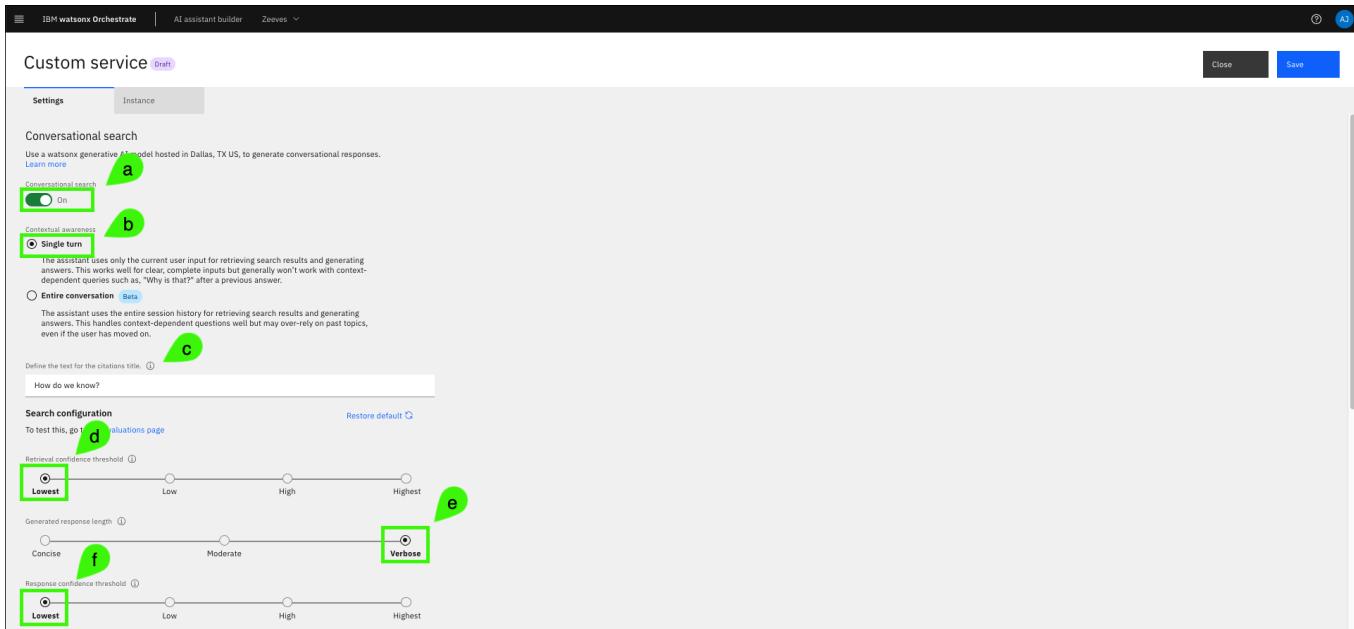
c. Specify the text that appears to instruct the user to expand the list of citations in the assistant (except web chat client).

d. Select **Lowest** for the **retrieval confidence threshold** setting. This setting checks the confidence of the retrieved citations before a response is generated.

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

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

f. Select **Lowest** for the **response confidence threshold**. This setting checks the confidence of the generated citations after the response is generated.



g. Keep the default setting of **All** for the listing of citations.

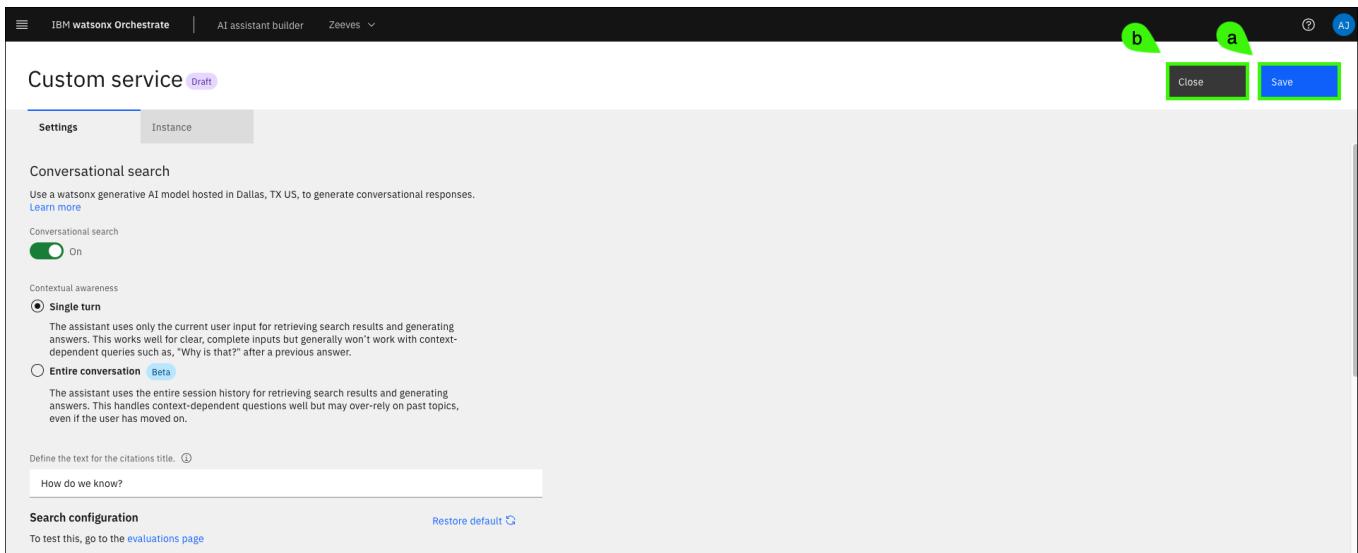
h. Keep the **Default filter** field empty.

i. The **Metadata** field provides a way to adjust your assistant's behavior during conversational search for your OpenSearch instance. This option is explored in detail in the [Installing and using zassist to ingest client documents](#). Leave the field empty for now.

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



8. Click **Save** (a) and then click **Close** (b).



Complete the configuration

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

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

The screenshot shows the IBM Watsonx Orchestrate interface. On the left, there's a sidebar with options like Home, Generative AI (which is selected and highlighted with a green box), Actions, Deploy, Publish, Environments, Improve, and Analyze. The main content area is titled "Generative AI" and "Large language model (LLM) (Beta)". It includes sections for "Default prompt", "Instructions", and "Preview". The preview window shows a message from a customer at 2:08 PM: "Greet customer [default]" and a response from the AI: "Welcome, how can I assist you?".

2. Click Set by assistant under the All items menu.

This screenshot shows the "Actions" section of the AI assistant builder. On the left, there's a sidebar with "All items" selected. Under "All items", the "Set by assistant" option is highlighted with a green box. The main content area has a heading "Create your first action" and a sub-instruction "With actions, you can help your customers accomplish their goals." Below this is a "Create action" button.

3. Click No matches.

This screenshot shows the "Set by assistant" section of the AI assistant builder. On the left, the "Set by assistant" option is selected. In the main content area, there's a table with four rows: "Greet customer", "Trigger word detected", "No matches" (which is highlighted with a green box), and "Fallback".

4. Click Step 1 under Conversation steps.

This screenshot shows the "Conversation steps" section of the AI assistant builder. On the left, there's a sidebar with "Conversation steps" selected. Step 1 is highlighted with a green box. The main content area shows a "Customer starts with:" input field containing "Example: Can I have a sandwich?", an "Action starts" section with a note about no matches, and an "Additional training examples (optional)" section.

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

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

Step 1

Is taken: with conditions

Conditions:

If All of this is true:

No matches count <= 3

and Add condition +

New condition group

Assistant says

I'm afraid I don't understand. Please rephrase your question.

Cancel Clear conditions

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

Step 1

Is taken: without conditions

Assistant says

For example: Please select from the following options:

Define customer response

And then

End the action

7. Expand the **And then** drop-down menu and select **Search for the answer**.

Step 1

Is taken: without conditions

Assistant says

For example: Please select from the following options:

Define customer response

And then

End the action

Search for the answer

Continue to next step

Re-ask previous step(s)

Go to a subaction

Use an extension

Search for the answer

Connect to agent

End the action

8. Click **Edit settings**.

The screenshot shows the IBM Watsonx Orchestrator interface. On the left, the 'Conversation steps' panel lists a single step: '1 This step has no content' with a sub-step 'Q. Search for the answer'. On the right, the 'Step 1' configuration panel shows the following settings:

- Is taken:** without conditions
- Assistant says:** A text input field containing placeholder text: "For example: Please select from the following options:"
- And then:** A dropdown menu showing 'Q. Search for the answer' selected.
- Custom query:** None (Customer's message will be the query)
- Custom filter:** None (Optional)
- Edit settings:** A button at the bottom of the configuration panel.

9. Click After generation.

The screenshot shows the configuration dialog for the 'Search for the answer' step. The 'Search configuration' tab is selected, showing the 'After generation' sub-tab. The 'After generation' section contains the following options:

- Search configuration:** Set how you want your search to perform before a response is generated. It includes a 'Custom search query (Optional)' input field with placeholder text: "Example: Which accounts have fees?"
- Custom results filter:** A radio button group where 'Use default' is selected.
- Search configuration:** Set how you want your search to perform after a response is generated. It includes a 'Custom search query (Optional)' input field with placeholder text: "Example: enriched_text.entities.text...Boston, MA".
- Custom results filter:** A radio button group where 'Use default' is selected.

At the bottom of the dialog are 'Cancel' and 'Apply' buttons.

10. Select End the action after this step and then click Apply.

The screenshot shows the configuration dialog for the 'Search for the answer' step. The 'After generation' tab is selected, showing the 'After generation' section. The 'After generation' section contains the following options:

- Display the response to the end user without storing it in an action variable** (radio button selected)
- Store response in an action variable and display it to your user**
- Store response in an action variable only**

Below these options is a 'Search results' section with a checkbox for 'Include the full search results in the stored action variable'. Underneath is an 'Action completion' section with a checkbox for 'End the action after this step'.

At the bottom of the dialog are 'Cancel' and 'Apply' buttons. The 'End the action after this step' checkbox is highlighted with a green border.

11. Click Save (💾).

The screenshot shows the AI assistant builder interface with the 'Editor' tab selected. On the left, there's a sidebar for 'Conversation steps' with two steps: Step 1 ('Search for the answer') and Step 2 ('No matches count > 3'). Step 2 has a condition 'If All of this is true:' with a single condition 'No matches count > 3'. The top right corner of the main editor area is highlighted with a green box.

12. Select Step 2 (No matches count) under Conversation steps and click delete (🗑).

This screenshot is similar to the previous one, but Step 2 is now selected in the 'Conversation steps' list on the left. The delete icon for Step 2 is highlighted with a green box. The top right corner of the editor window is also highlighted with a green box.

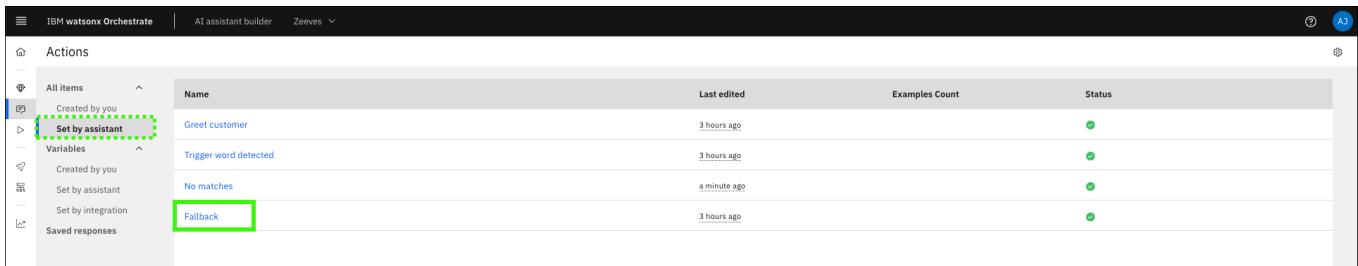
13. Click Delete in the confirmation dialog to delete Conversation step 2.

A confirmation dialog box is displayed in the center of the screen, asking 'Are you sure you want to delete step 2? You will not be able to recover this data once deleted.' At the bottom right of this dialog is a red button labeled 'Delete', which is highlighted with a red box. The rest of the interface, including the conversation steps list, is dimmed.

14. Click Close (the x icon) the Editor window.

The screenshot shows the same interface as before, but the 'Editor' window is now closed, represented by a smaller, semi-transparent window frame at the top right. The rest of the interface is dimmed.

15. Click Fallback in the Actions table.

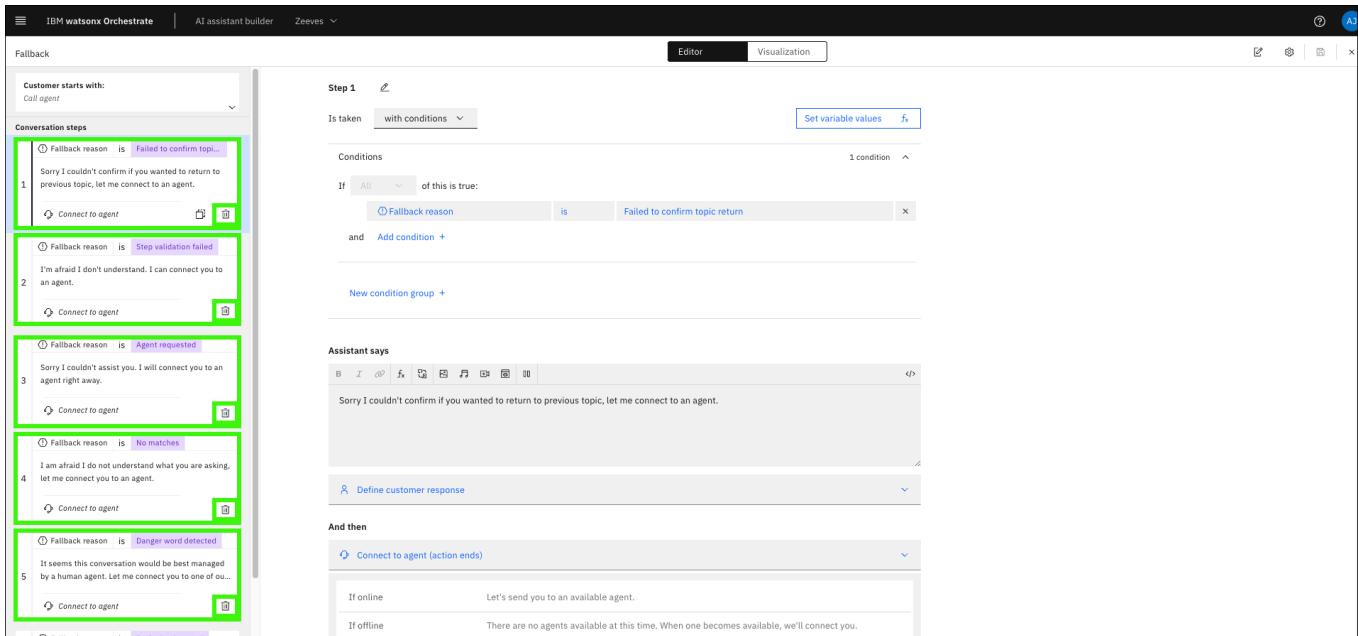


The screenshot shows the 'Actions' section of the IBM Watsonx Orchestrator interface. A green box highlights the 'Set by assistant' category in the sidebar. Within this category, the 'Fallback' item is highlighted with a green box.

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
Fallback	3 hours ago	1	Green

16. Delete all of the Conversation steps.

Note: The following image is edited. Only five steps are shown, but all six need to be deleted. You need to select each step individually. Click **delete** (trash icon) and confirm the deletion.

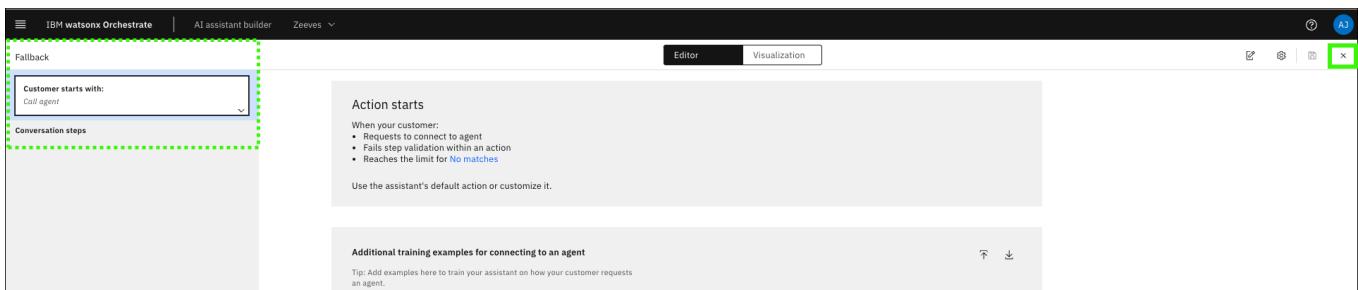


The screenshot shows the 'Editor' window for the 'Fallback' conversation step. On the left, a tree view shows 'Customer starts with: Call agent' and 'Conversation steps'. Six steps are listed, each with a trash icon for deletion:

1. Fallback reason is Failed to confirm topic... (Delete)
2. Fallback reason is Step validation failed (Delete)
3. Fallback reason is Agent requested (Delete)
4. Fallback reason is No matches (Delete)
5. Fallback reason is Danger word detected (Delete)
6. Fallback reason is No matches (Delete)

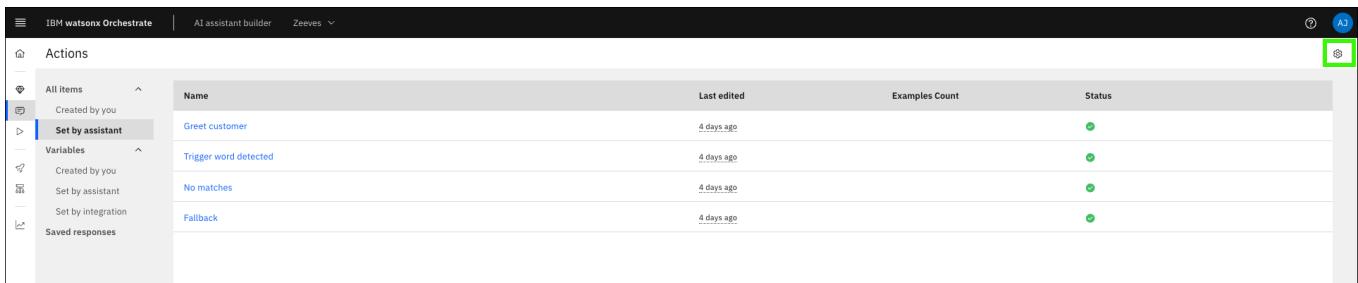
The right panel shows the step configuration, including conditions and responses.

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



The screenshot shows the 'Editor' window for the 'Fallback' conversation step. The 'Conversation steps' section is now empty, indicated by a dashed green border. The right panel shows the step configuration.

18. Click the Global settings (⚙️).



The screenshot shows the 'Actions' section of the IBM Watsonx Orchestrator interface. A green box highlights the 'Set by assistant' category in the sidebar.

Name	Last edited	Examples Count	Status
Greet customer	4 days ago	1	Green
Trigger word detected	4 days ago	1	Green
No matches	4 days ago	1	Green
Fallback	4 days ago	1	Green

19. Click No matches under the Conversation routing tab.

Global settings

Conversation routing Change conversation topic Generative AI **New!** Autocorrection Display formats Algorithm Version Upload/Download

No matches

Your assistant can show options to users when multiple actions seem to match what the customer wants. [Learn more about asking a clarifying question](#)

Enable disambiguation On

Assistant says
Introduction text before listing the options.
Did you mean:

No matches
Option for when the user doesn't see relevant options. Leave blank to omit.
None of the above

Beta Response modes
 Off

One action matches
Option for when user doesn't want to start the matched action
Something else

Connection to support
Can be any alternative help, such as a live agent or contact information
Connect to support

Example of asking a clarifying question

Important Make sure your action names are short and clear to your customers. Action names will appear in the list of choices.

Bank Bot

open an account

Did you mean:

- Open a new savings account
- Open a new checking account
- I want to apply for a mortgage loan
- None of the above

20. Move the slider to **More often** (or select **More often** in the drop-down).

The setting helps ensure that actions are triggered less often unless the user's query specifically matches the action's input.

Global settings

Conversation routing Change conversation topic Generative AI **New!** Autocorrection Display formats Algorithm Version Upload/Download

No matches

Unrecognized input by customers triggers the **No matches** action that can be configured to fetch answers from a [search integration](#) or trigger the **Fallback** action.

By setting this threshold, you can affect how often your assistant routes customers to the "No matches" action.

Use "No matches" More often

21. Click **Autocorrection**.

Global settings

Conversation routing Change conversation topic Generative AI **New!** **Autocorrection** Display formats Algorithm Version Upload/Download

No matches

Unrecognized input by customers triggers the **No matches** action that can be configured to fetch answers from a [search integration](#) or trigger the **Fallback** action.

By setting this threshold, you can affect how often your assistant routes customers to the "No matches" action.

Use "No matches" More often

22. Click the autocorrection toggle to turn the feature **Off**.

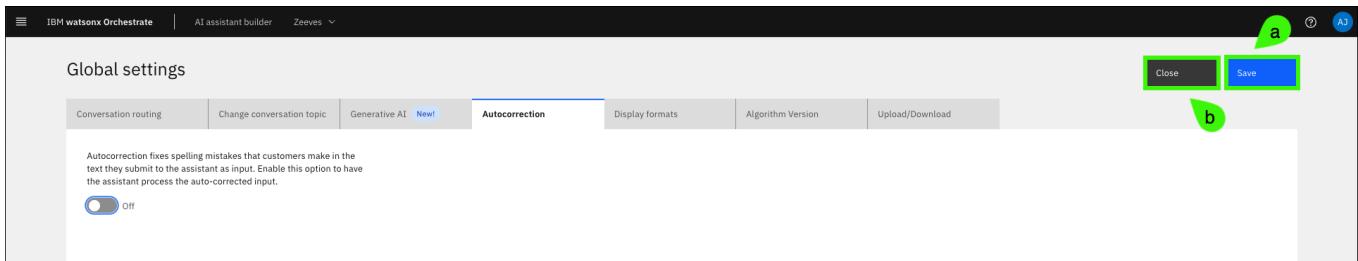
Global settings

Conversation routing Change conversation topic Generative AI **New!** **Autocorrection** Display formats Algorithm Version Upload/Download

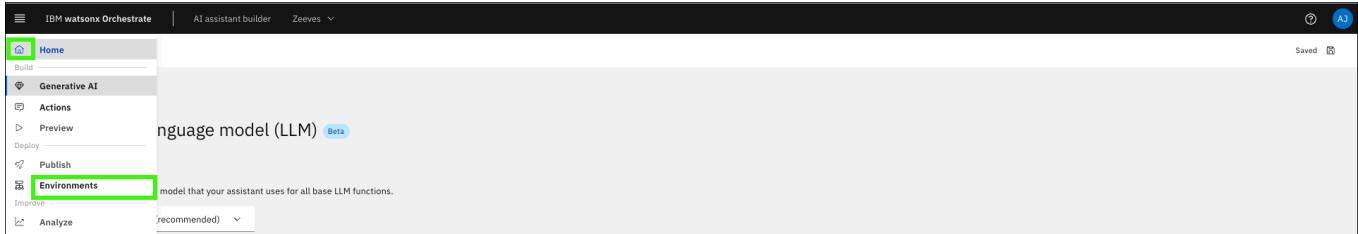
Autocorrection fixes spelling mistakes that customers make in the text they submit to the assistant as input. Enable this option to have the assistant process the auto-corrected input.

Off

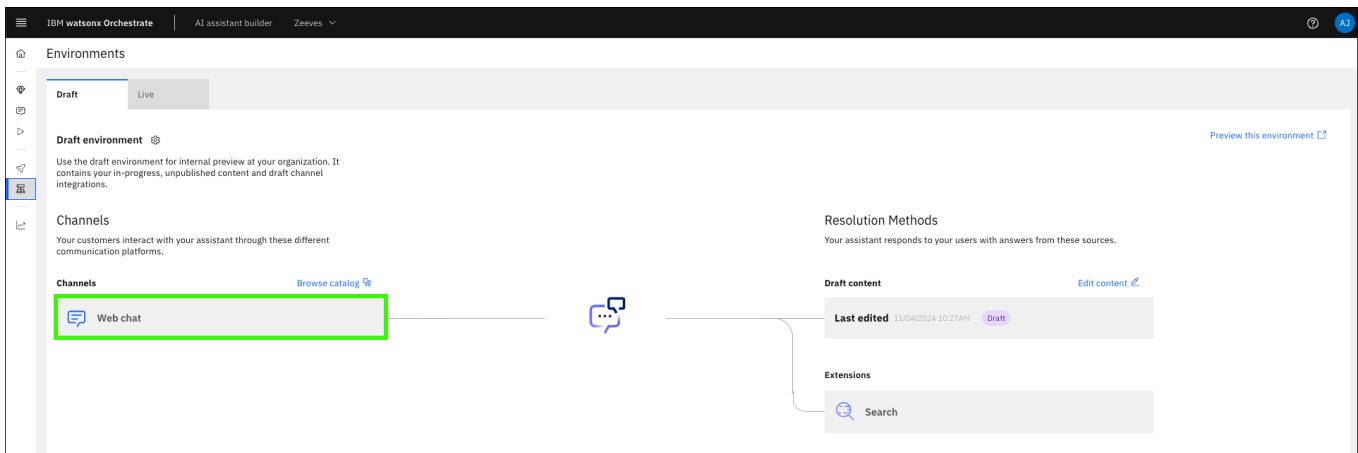
23. Click **Save** (a) and then **Close** (b).



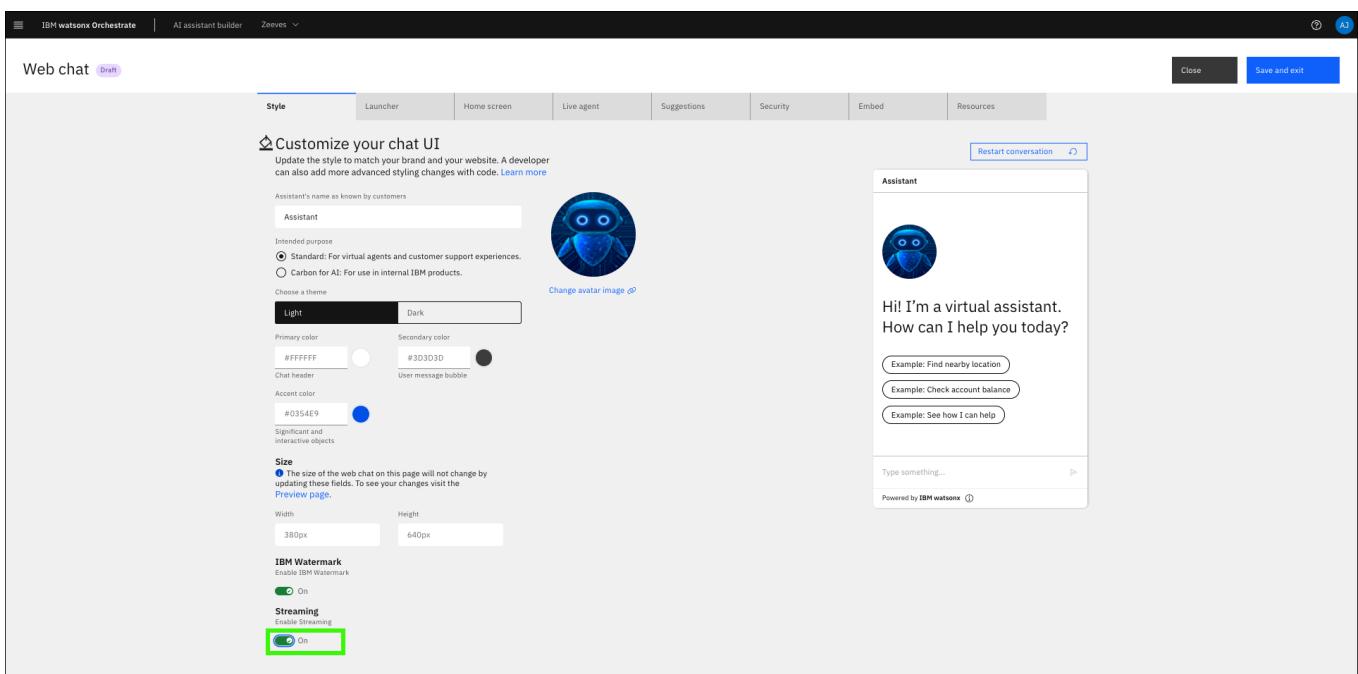
24. Hover over the Home (🏠) and click Environments.



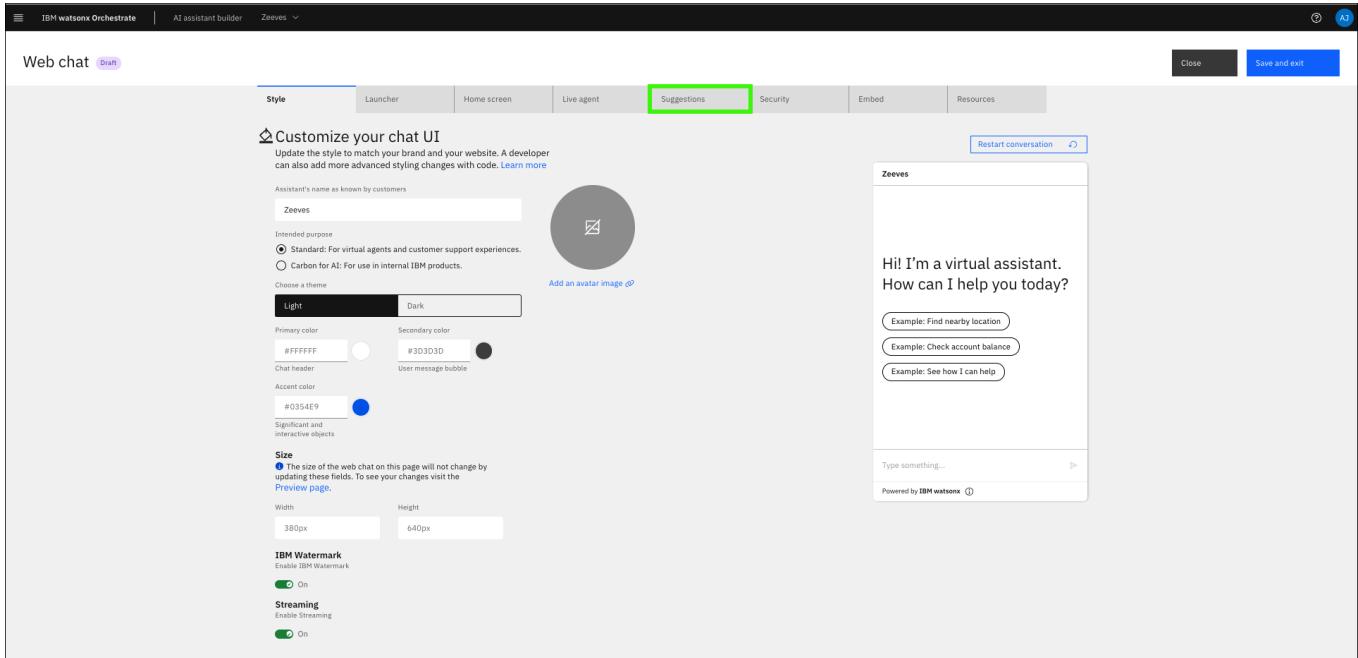
25. Click Web chat.



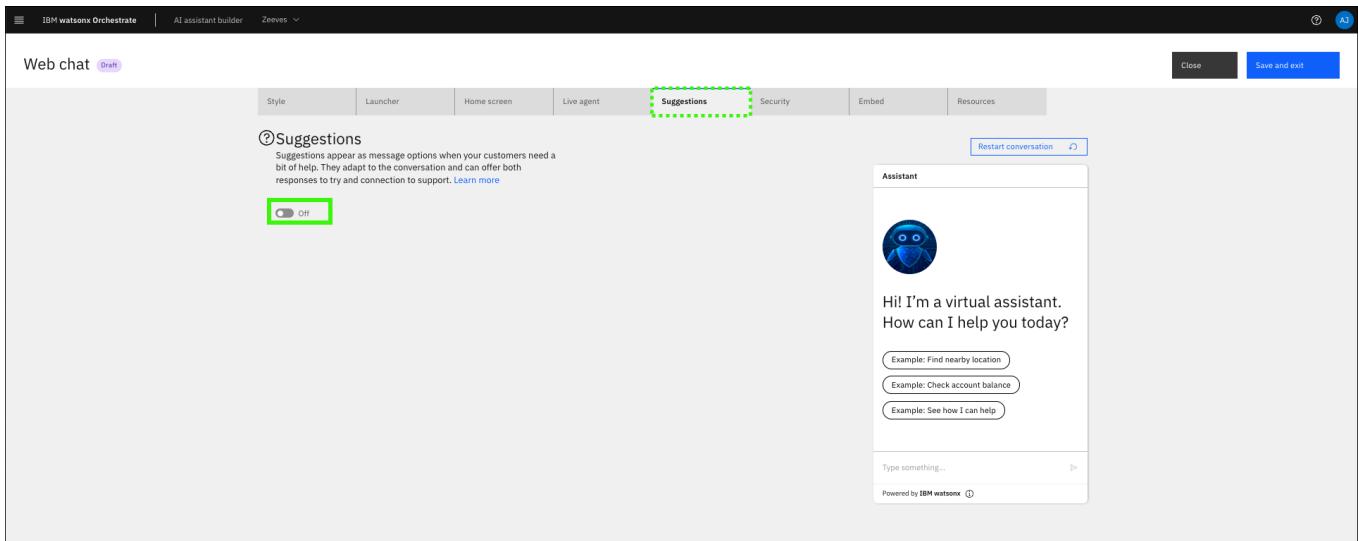
26. On the Style tab, click the Streaming toggle to enable streaming.



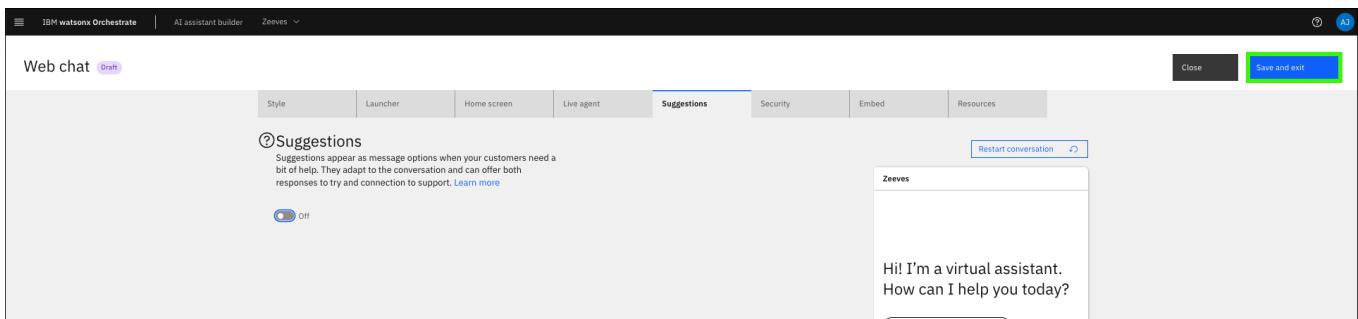
27. Click **Suggestions**.



28. Click the **Suggestions** toggle to turn this feature **Off**.



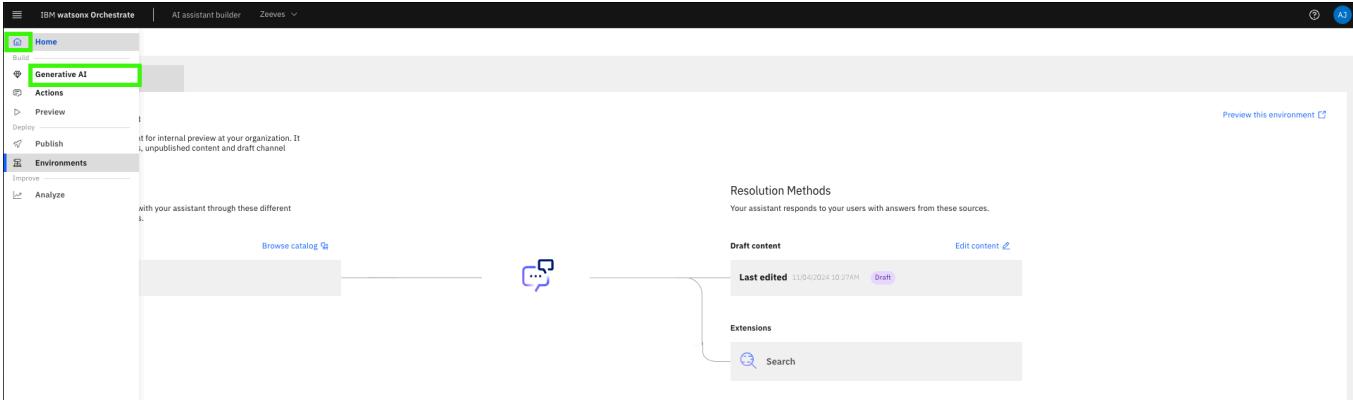
29. Click **Save and exit**.



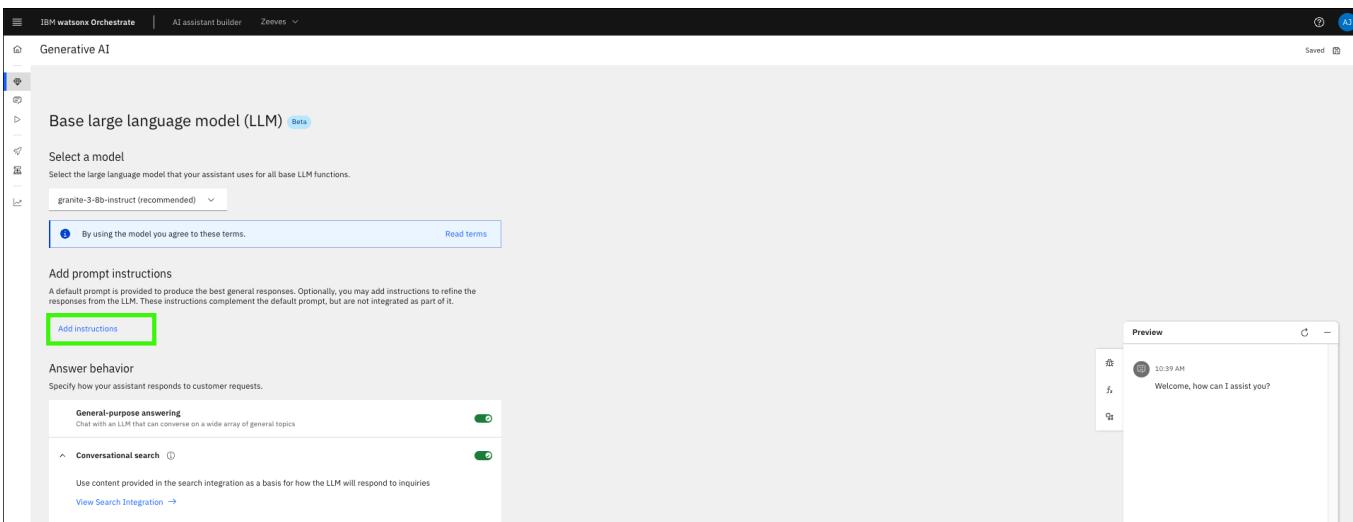
Configure the base large language model

After the preceding steps are completed, there are enhancements you can make to configure how the large language model (LLM) responds to your queries including adding prompt instructions and configuring the LLM's answer behavior. These options can be summarized [here](#).

1. Hover over the Home () and click Generative AI.



2. Click Add instructions.



3. Enter a prompt instruction.

This option instructs the LLM in your assistant to give refined responses by adding prompt instructions. The instructions help the LLM guide the conversations by clarifying how to achieve the end-goal of an action.

Enter prompt instructions in the field. The maximum number of characters you can enter in the prompt instruction field is 1,000.

The following is an example prompt instruction that works well. Experiment with different prompt instructions.

You are a subject matter expert on mainframe systems. Please respond to all prompts with truth and accuracy. Keep all answers short and concise, unless requested to provide details.

Note: When the instructions are typed in, they are automatically saved and the LLM is immediately trained on them.

The screenshot shows the 'Generative AI' configuration page. In the 'Answer behavior' section, the 'General-purpose answering' toggle switch is turned on (green). Below it, the 'Conversational search' toggle switch is also turned on (green). A preview window on the right shows a message from 'Greet customer [default]' at 10:47 AM: 'Welcome, how can I assist you?'. The 'Save' button is located in the top right corner of the main configuration area.

4. Toggle **General-purpose answering** to **Off** and then click **Save** (💾).

The ability exists to configure the answering behavior of your assistant to provide responses that are based on the preinstalled content or general content.

On the **Generative AI** page (under **Prompt Instructions**), you see the **Answer behavior** section. After you configure **Conversational search**, you see that it is enabled (toggled on) with the search integration added.

If you enable both general-purpose answering as well as conversational search, the conversational search answering takes precedence over General-purpose answering.

Recommendation: For purposes of retrieving Z-specific answers and responses, it is recommended that you turn off general-purpose answering and leave only conversational search turned on.

The screenshot shows the 'Generative AI' configuration page. In the 'Answer behavior' section, the 'General-purpose answering' toggle switch is turned off (gray). Below it, the 'Conversational search' toggle switch is turned on (green). A preview window on the right shows a message from 'Greet customer [default]' at 10:47 AM: 'Welcome, how can I assist you?'. The 'Save' button is located in the top right corner of the main configuration area.

Testing conversational search

Now you can begin issuing queries to test the assistant's responses.

Important: Many of the settings configured earlier can be iteratively modified based on your assessment of the quality of responses. The settings can be reviewed and changed at any time. For example, adding extra prompt instructions, changing the verbosity of the responses, and modifying the indexes used for OpenSearch.

1. Hover over the **Home** () and click **Preview**.

2. Experiment with different prompts and validate that the answers are reasonable and related to IBM Z.

Other prompts and responses follow.

Note: The responses that you receive can vary from the ones shown.

Prompt:

What is z/OS continuous delivery?

Example output:

The AI response text is as follows:

5:26 AM
What is z/OS continuous delivery?
5:26 AM
Z/OS continuous delivery is a model that allows IBM to deliver new functions and capabilities to its z/OS operating system on a regular basis, without waiting for the next major release. This model enables clients to benefit from new features and enhancements more quickly and with greater flexibility, as it is not centered around a release date. New functions are delivered through APARs and can be selectively rolled out to specific CICS regions or across CICSplexes during the system software maintenance cycle.

Prompt:

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

Example output:

The screenshot shows the IBM Watsonx Orchestrate interface. On the left, there's a sidebar with icons for preview, AI assistant builder, and Zeeves. The main area has a title "Sample website". On the right, there's a chat window titled "Zeeves" with a message from the user: "What is the APF list in z/OS? Provide a detailed explanation?" Below it, the AI response is provided in three segments:

- 11:02 AM: The APF (Authorized Program Facility) list in z/OS is a system component that controls which libraries and data sets are authorized to run in privileged mode. These libraries and data sets are typically system critical programs and utilities that require elevated privileges to function correctly. By authorizing these
- 11:02 AM: The APF list contains a list of libraries and data sets that are authorized to run in privileged mode. These libraries and data sets are typically system critical programs and utilities that require elevated privileges to function correctly. By authorizing these
- 11:02 AM: The APF list contains a list of libraries and data sets that are authorized to run in privileged mode. These libraries and data sets are typically system critical programs and utilities that require elevated privileges to function correctly. By authorizing these

At the bottom of the chat window, there's a text input field with "Type something..." and a "Powered by IBM Watsonx" link.

Prompt:

Why is Db2 different than other database systems?

Example output:

The screenshot shows the IBM Watsonx Orchestrate interface. On the left, there's a sidebar with icons for preview, AI assistant builder, and Zeeves. The main area has a title "Sample website". On the right, there's a chat window titled "Zeeves" with a message from the user: "Why is Db2 different than other database systems?" Below it, the AI response is provided in three segments:

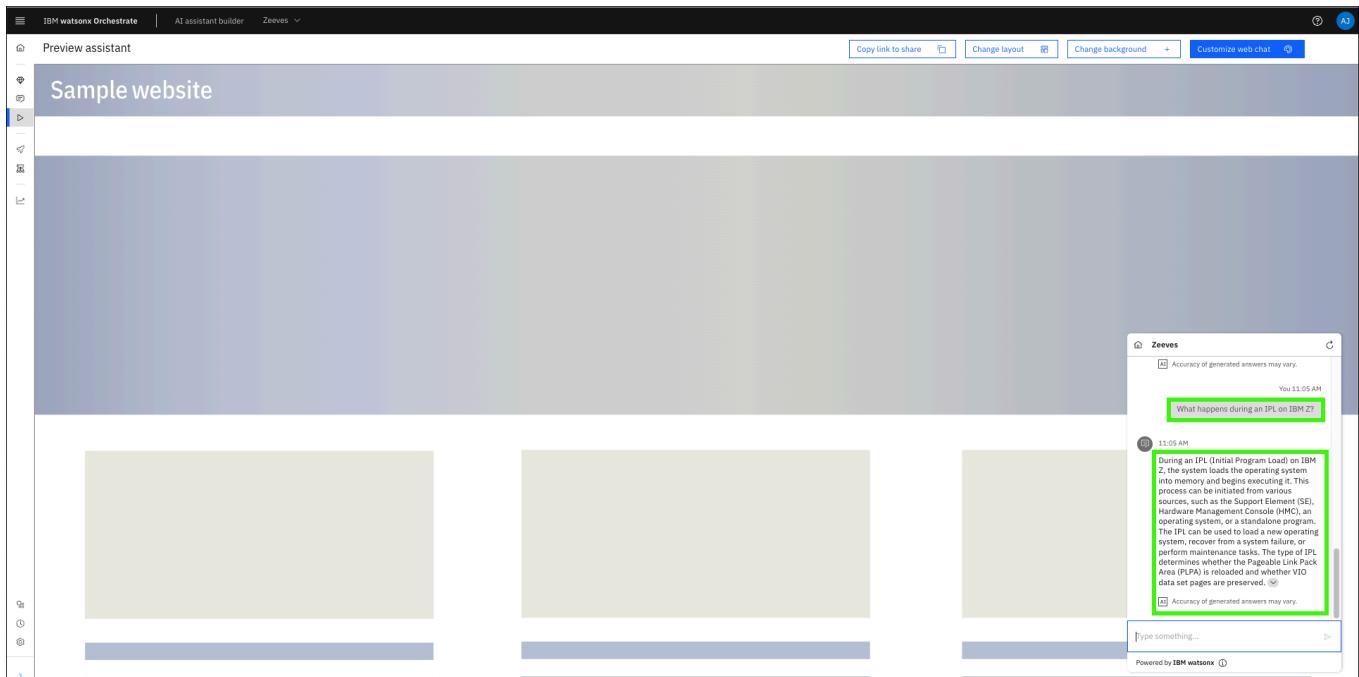
- 11:03 AM: Db2 is a database management system (DBMS) that runs under the z/OS operating system, which is specific to mainframe computers. Other database systems may run on various operating systems like Oracle, MySQL, PostgreSQL, etc. Additionally, Db2 provides a higher level of data management and security features compared to other database systems, as it manages data stored in databases and controls access to the data. -o-
- 11:03 AM: Db2 is a database management system (DBMS) that runs under the z/OS operating system, which is specific to mainframe computers. Other database systems may run on various operating systems like Oracle, MySQL, PostgreSQL, etc. Additionally, Db2 provides a higher level of data management and security features compared to other database systems, as it manages data stored in databases and controls access to the data. -o-
- 11:03 AM: Db2 is a database management system (DBMS) that runs under the z/OS operating system, which is specific to mainframe computers. Other database systems may run on various operating systems like Oracle, MySQL, PostgreSQL, etc. Additionally, Db2 provides a higher level of data management and security features compared to other database systems, as it manages data stored in databases and controls access to the data. -o-

At the bottom of the chat window, there's a text input field with "Type something..." and a "Powered by IBM Watsonx" link.

Prompt:

What happens during an IPL on IBM Z?

Example output:



You now have a working assistant that uses IBM watsonx Assistant for Z. Take time to explore different prompt instructions and settings. If you encounter any issues, the Troubleshooting section that follows can help resolve them.

Continue to the [Creating a stand-alone OpenSearch instance for document ingestion](#) to learn how to configure a dedicated OpenSearch instance for ingesting client-specific documentation into the RAG model.

Troubleshooting

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

✖ 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.

Ingesting client documents

Creating a stand-alone OpenSearch instance for document ingestion

Next, learn to enable a client to ingest their own documentation into the Retrieval Augmented Generation (RAG) used by IBM watsonx Assistant for Z. The first step is to deploy a dedicated [OpenSearch](#) instance. The dedicated search instance is referred to as bring-your-own-search (BYOS).

Earlier, you provisioned three IBM Technology Zone (ITZ) environments. One of which was a single-node Red Hat OpenShift (SNO) cluster. If you have not reserved this environment, or it is not in the **Ready** state, return to the [IBM Technology Zone environment](#) section to complete the reservation.

Install the Red Hat OpenShift command-line interface utility

The Red Hat OpenShift command-line interface (CLI) utility, which is known as **oc**, must be installed on your local workstation. If you already installed the **oc** utility, you can proceed to [log in to the SNO cluster](#).

1. Click the following link to open a browser window to your ITZ reservations.

[ITZ My reservations](#)

2. Click the **Single Node OpenShift** tile.

The screenshot shows the 'My reservations' section of the IBM Technology Zone interface. On the left, a sidebar lists 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', and 'My reservations'. The 'My reservations' item is selected and highlighted with a blue background. The main area displays three environment tiles:

- Single Node OpenShift (VMware on IBM Cloud)**: Status - Ready. This tile is highlighted with a green border around its title and the 'Open this environment' button below it. It shows the following details:
 - Education
 - Start date: Oct 31, 2024 7:02 AM
 - End date: Nov 6, 2024 6:49 AM
 - Extend limit: 0
 - Open this environment**
- watsonx Assistant for Z Pilot - AAP & z/OS**: Status - Ready. This tile shows the following details:
 - Education
 - Start date: Oct 30, 2024 8:12 AM
 - End date: Nov 5, 2024 7:53 AM
 - Extend limit: 0
 - Open this environment**
- watsonx Assistant for Z Pilot - watsonx O...**: Status - Ready. This tile shows the following details:
 - Education
 - Start date: Oct 30, 2024 8:10 AM
 - End date: Nov 5, 2024 7:12 AM
 - Extend limit: 0
 - Open this environment**

3. Scroll down and record the **Cluster Admin Username** and **Cluster Admin Password**.

Reservation Details

API URL
<https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443>

Bastion Password [REDACTED]

Bastion RDP Address
api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:43389

Bastion SSH connection
ssh itzuser@api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com -p 40222

Bastion Username
itzuser

Cluster Admin Username
kubeadmin

Cluster Admin Password [REDACTED]

OCP Console
<https://console.openshift-console.apps.672371d38376796fb96a6c4d.ocp.techzone.ibm.com>

OCP Version
4.14

vCenter
itzeu-vc.eu.cloud.techzone.ibm.com

Download kubeconfig

4. Click the **OCP Console** link.

Note: OCP stands for OpenShift Container Platform.

Reservation Details

API URL
<https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443>

Bastion Password [REDACTED]

Bastion RDP Address
api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:43389

Bastion SSH connection
ssh itzuser@api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com -p 40222

Bastion Username
itzuser

Cluster Admin Username
kubeadmin

Cluster Admin Password [REDACTED]

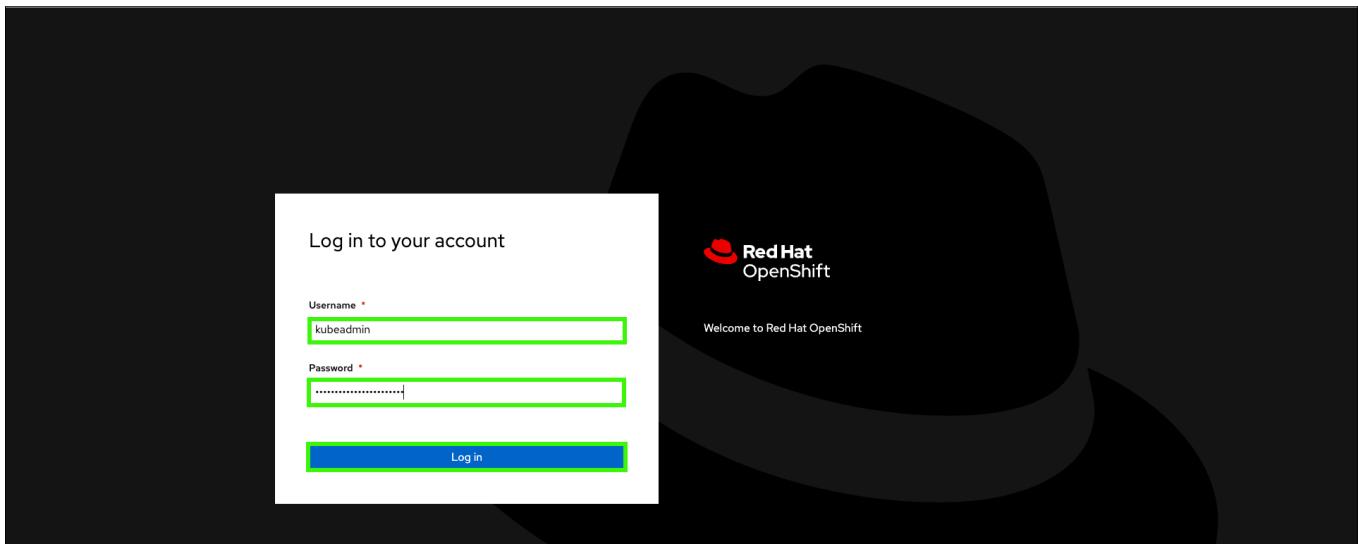
OCP Console
<https://console.openshift-console.apps.672371d38376796fb96a6c4d.ocp.techzone.ibm.com>

OCP Version
4.14

vCenter
itzeu-vc.eu.cloud.techzone.ibm.com

Download kubeconfig

5. Enter the **Cluster Admin Username** and **Cluster Admin Password** values from step 3 and click **Log in**.



6. Click Help (?) and then click **Command Line Tools**.

7. Click the link under **oc - OpenShift Command Line Interface (CLI)** for the operating system of your local machine.

Clicking the preceding link automatically downloads either a **.zip** or **.tar** file specific to your operating system. Unzip or untar the file. Place the **oc** binary for your operating system (OS) in a directory that is in your default PATH, or set the PATH environment variable to include the location of the **oc** binary.

8. Verify the installation by running the **oc** command on your local workstation.

```
oc --help
```

Sample output:

```
andrewjones@Andrews-MBP ~ % oc --help
OpenShift Client

This client helps you develop, build, deploy, and run your applications on any
OpenShift or Kubernetes cluster. It also includes the administrative
commands for managing a cluster under the 'adm' subcommand.

Basic Commands:
  login           Log in to a server
  new-project     Request a new project
  new-app          Create a new application
  status           Show an overview of the current project
  project          Switch to another project
  projects         Display existing projects
  explain          Get documentation for a resource

Build and Deploy Commands:
  rollout          Manage a Kubernetes deployment or OpenShift deployment
  config           Revert part of an application back to a previous deployment
```



Mac/OS users may need to adjust security settings.



The **oc** binary may cause a security exception. Adjust the security settings by opening the **System Settings** utility and clicking **Privacy & Security**. Under **Security** locate the message about the **oc** binary and click **Allow Anyway**. Return to the terminal window and try the `oc --help` command again and click **Allow Anyway** when prompted.

Prepare to ingest documents

Before ingesting documents, complete the following setup steps.

Log in to the OpenShift cluster from your local terminal

Note: If you just installed the **oc** utility, skip the next 5 steps.

1. Click the following link to open a browser window to your ITZ reservations.

[ITZ My reservations](#)

2. Click the **Single Node OpenShift** tile.

3. Scroll to the bottom of the reservation page and record the **Cluster Admin Username** and **Cluster Admin Password**.

API URL	https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443		
Bastion Password	<input type="password"/>		
Bastion RDP address	api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:43389		
Bastion SSH connection	ssh itzuser@api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com -p 40222		
Bastion Username	itzuser	<input type="text" value="kubeadmin"/>	<input type="password"/>
OCP Console	https://console-openshift-console.apps.672371d38376796fb96a6c4d.ocp.techzone.ibm.com		
OCP version	4.14		
vCenter	itzeu-vc.eu.cloud.techzone.ibm.com		
Download kubeconfig			

4. Click the **OCP Console** link.

5. Enter the **Cluster Admin Username** and **Cluster Admin Password** values from step 3 and click **Log in**.

6. Click the **kube:admin** profile drop-down and click **Copy login command**.

7. Click **Display Token**.

8. Select and copy the **Log in with this token** string.

For most operating systems, double-click the value, then right-click and select **Copy**.

Your API token is
sha256~zuWR0KDnkYniIY0m8g8iKoUXPdFFFmou-o4s5FsrDNA

Log in with this token

```
oc login --token=sha256~zuWR0KDnkYniIY0m8g8iKoUXPdFFFmou-o4s5FsrDNA --server=https://api.672b79320c7a71b728e523b4.ocp.techzone.ibm.com:6443
```

Use this token directly against the API

```
curl -H "Authorization: Bearer sha256~zuWR0KDnkYniIY0m8g8iKoUXPdFFFmou-o4s5FsrDNA" "https://api.672b79320c7a71b728e523b4.ocp.techzone.ibm.com:6443/v1/users/~"
```

Request another token

[Logout](#)

A context menu is open over the token value, with the 'Copy' option highlighted.

9. Open a command prompt or terminal window on your local workstation.

10. Paste the login command and press **enter**.

```
andrewjones@Andrews-MBP ~ % oc login --token=sha256~mJ4L8K6cUMyNyk2Z69KMm3vbP1sWc8SW0eeOdVqtA94 --server=https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443
Logged into "https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443" as "kube:admin" using the token provided.
You have access to 70 projects, the list has been suppressed. You can list all projects with 'oc projects'
Using project "default".
andrewjones@Andrews-MBP ~ %
```

Create a working directory

1. Create a directory to store the configuration files that you will create in the next steps.



Instructions vary by your local workstation's operating system.

The directions that follow may vary depending on your operating system. The examples provided are based upon MacOS.

```
mkdir watsonxAssistant
```

2. Change to the new directory.

```
cd watsonxAssistant
```

```
andrewjones@Andrews-MBP ~ % oc login --token=sha256~mJ4L8K6cUMyNyk2Z69KMm3vbP1sWc8SW0eeOdVqtA94 --server=https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443
Logged into "https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443" as "kube:admin" using the token provided.
You have access to 70 projects, the list has been suppressed. You can list all projects with 'oc projects'
Using project "default".
andrewjones@Andrews-MBP ~ % mkdir watsonxAssistant
andrewjones@Andrews-MBP ~ % cd watsonxAssistant
andrewjones@Andrews-MBP watsonxAssistant %
```

Install IBM Certificate Manager on Red Hat OpenShift

1. In a text editor, create a file named `catalogCertManager.yaml` and paste the following text in the file.



Formatting of the yaml file is critical!

The content of the YAML file must be formatted exactly as shown. Use the **Copy** icon to prevent typographical errors.

File name:

```
catalogCertManager.yaml
```

File contents:

```
apiVersion: operators.coreos.com/v1alpha1
kind: CatalogSource
metadata:
  name: ibm-cert-manager-catalog
  namespace: openshift-marketplace
spec:
  displayName: ibm-cert-manager-4.2.7
  grpcPodConfig:
    securityContextConfig: restricted
    image: icr.io/cpopen/ibm-cert-manager-operator-
catalog@sha256:4dcf4ace4b5f166f83b31063f7e6404dbf78d8e98a9d4fcf52fedf576a55ca6c
  publisher: IBM
  sourceType: grpc
  updateStrategy:
    registryPoll:
      interval: 30m0s
```

2. Install the IBM Certificate Manager operator in the Red Hat OpenShift cluster.

```
oc apply -f catalogCertManager.yaml
```

The preceding command returns a message that states the **ibm-cert-manager-catalog** was created.

3. In the OpenShift web console, click **Operators** and then select **OperatorHub**.

The screenshot shows the Red Hat OpenShift web console interface. The left sidebar has a navigation menu with items like 'Administrator', 'Home', 'Operators' (which is expanded to show 'OperatorHub' and 'Installed Operators'), 'Workloads', and 'Networking'. The 'OperatorHub' item is highlighted with a green box. The main content area has a header 'Command Line Tools' and a sub-section 'oc - OpenShift Command Line Interface (CLI)'. It includes a note about the oc binary and download links for various platforms.

4. Click the **Project** to pull-down menu and click the **Show default projects** toggle.

The screenshot shows the Red Hat OpenShift interface on the OperatorHub page. The left sidebar has 'OperatorHub' selected. The main area shows a dropdown menu for 'Project: All Projects'. A green box highlights the dropdown menu. Below it, there's a search bar with 'Select project...' and a toggle switch for 'Show default projects'. A list of projects is shown, including 'All Projects', 'default', 'kube-node-lease', and 'kube-public'. At the bottom right, it says '624 items'.

5. Scroll down and select **openshift-marketplace**.

The screenshot shows the Red Hat OpenShift interface on the OperatorHub page. The left sidebar has 'OperatorHub' selected. The main area shows a list of operators under the 'All Projects' dropdown. A green box highlights 'openshift-marketplace'. Other operators listed include 'openshift-kube-controller-manager-operator', 'openshift-kube-scheduler', 'openshift-kube-scheduler-operator', 'openshift-kube-storage-version-migrator', 'openshift-kube-storage-version-migrator-operator', 'openshift-machine-api', 'openshift-machine-config-operator', and 'openshift-node'. At the bottom right, it says '624 items'.

6. Enter IBM Cert Manager in the search field and then click the IBM Cert Manager tile.

Be patient.
It may take a minute or two for the IBM Cert Manager tile to appear.

Note: The current version of the operator may differ than the one shown in the image below.

The screenshot shows the Red Hat OpenShift interface on the OperatorHub page. The left sidebar has 'OperatorHub' selected. The main area shows a search bar with 'IBM Cert Manager' highlighted. Below it, a list of operators is shown, with 'ibm-cert-manager-4.2.7' highlighted by a green box. Other operators listed include 'AI/Machine Learning', 'Application Runtime', 'Big Data', 'Cloud Provider', 'Database', 'Developer Tools', 'Development Tools', 'Drivers and plugins', 'Integration & Delivery', 'Logging & Tracing', 'Modernization & Migration', 'Monitoring', 'Networking', 'OpenShift Optional', and 'Security'. At the bottom right, it says '1 items'.

7. Click **Install**.

The screenshot shows the Red Hat OpenShift OperatorHub interface. On the left, a sidebar menu includes sections like Home, Operators, Workloads, Networking, Storage, Builds, Observe, and Compute. Under Operators, 'OperatorHub' is selected. In the main content area, a search bar at the top right says 'All Items' and has 'ibm-cert-manager' typed into it. Below the search bar, a card for 'ibm-cert-manager-4.2.7' is displayed, which is described as 'IBM Cert Manager provided by IBM'. The card includes a brief description: 'Operator for managing deployment of cert-manager service.' At the bottom right of the card is a large green 'Install' button, which is also highlighted with a green box.

8. Keep the default settings and click **Install**.

The screenshot shows the 'Install Operator' configuration page. The left sidebar is identical to the previous one. The main area is titled 'Install Operator' and contains several configuration fields:

- Update channel ***: A dropdown menu set to 'v4.2'.
- Version ***: A dropdown menu set to '4.2.7'.
- Installation mode ***: A radio button group where 'All namespaces on the cluster (default)' is selected. A note below states: 'Operator will be available in all Namespaces.'
- Installed Namespace ***: A radio button group where 'Operator recommended Namespace: ibm-cert-manager' is selected. A note below states: 'Namespace ibm-cert-manager does not exist and will be created.'
- Update approval ***: A radio button group where 'Automatic' is selected.

On the right side, there are four cards representing different components:

- IBM Cert Manager**: Described as 'provided by IBM'. It has a note: 'You can use IBM Cert Manager Operator to install the IBM certificate manager service. IBM certificate manager service issues and manages x509 certificates from various sources, such as a simple signing key pair, or self-signed. It ensures certificates are valid and up to date and will renew certificates before they expire. If you are using this operator as part of an IBM Cloud Pak, see the documentation for your specific IBM Cloud Pak to learn more about how to install and use the operator service. For more information about IBM Cloud Paks, see [IBM Cloud Paks that use foundational services](#)'.
- CR CertificateRequest**: Described as 'Not available'.
- CMC Cert Manager Config**: Described as 'CertManagerConfig is the Schema for the certmanagerconfigs API. Documentation For additional details regarding install parameters check: <https://ibm.biz/icfps39install>. License By installing this product you accept the license terms...'.
- Challenge**: Described as 'Not available'.

At the bottom left are two buttons: a green 'Install' button and a blue 'Cancel' button. The 'Install' button is highlighted with a green box.

**Do not continue until...**

The installation process takes a few minutes. Do not continue until you see the following message: **Installed operator: ready for use.**

Install the watsonx Assistant for Z Operator (for OpenSearch)

1. In your command prompt or terminal window, create a new namespace called `wxa4z-byos` in the Red Hat OpenShift cluster.

```
oc create namespace wxa4z-byos
```

2. Create or obtain your IBM Container Software production entitlement key.

A production entitlement key is required to pull the container images that get deployed by the operator.

To create or retrieve your existing entitlement key, follow the instructions [here](#).

If additional assistance is needed, refer to this [site](#).

After locating your existing key or creating a new key, continue to the next step.

3. Click **copy** and record your entitlement key for future use in a secure location.

The screenshot shows the IBM Container Software and Cloud Pak Access Management interface. On the left, there's a sidebar with 'My IBM', 'Profile', 'Billing', 'Container Software and Cloud Pak Access Management', and 'Entitlement keys' (which is selected). Below that is 'Container software library'. The main area has a title 'Entitlement keys (1)'. It says 'Access your container software' and 'Your entitlement key allows you to access all your container software in the IBM Entitled Registry. For a full list of container software you own, view your [container software library](#)'. Under 'Active entitlement keys', it says 'Use any active entitlement key to log in to the image registry and retrieve any container software you own.' and lists: '– You can have a maximum of (5) entitlement keys.', '– Once a key is deleted, it's no longer valid.' A button 'Add new key' with a '+' icon is at the top right. Below that is a section with 'Issue date: October 17, 2022' and a long entitlement key string. At the bottom right are 'Copy' (highlighted with a green border), 'Delete' (highlighted with a red border), and 'Edit' buttons.

4. In your command prompt or terminal window, set an environment variable with your production entitlement key.

Substitute your production entitlement key copied in the last step for <entitlement key> .

```
export IBM_CS_ENT_KEY=<entitlement key>
```

5. Enter the following command to create a pull secret for the **Container Registry**.

```
oc -n wxa4z-byos create secret docker-registry icr-pull-secret --docker-server=cp.icr.io --  
docker-username=cp --docker-password=$IBM_CS_ENT_KEY
```

The terminal window shows the command being run. The line 'secret/icr-pull-secret created' is highlighted with a green box. The entire command line is also highlighted with a green box.

6. In a text editor, create a file named `catalogSource.yaml` and paste the following text in the file.



Formatting of the yaml file is critical!

The content of YAML files must be formatted exactly as shown. Use the copy icon to prevent typographical errors.

File name:

```
catalogSource.yaml
```

File contents:

```

apiVersion: operators.coreos.com/v1alpha1
kind: CatalogSource
metadata:
  name: ibm-wxa4z-operator-catalog
  namespace: wxa4z-byos
spec:
  displayName: "IBM watsonx Assistant for Z Operator Catalog"
  image: icr.io/cpopen/ibm-wxa4z-
  catalog: 2.0.2@sha256:d457aa24af07c23d7b36727a9cff95995ca1c4ed49fb980ef4f386fd09a29b4
  publisher: 'IBM'
  sourceType: grpc
  secrets:
    - icr-pull-secret

```

7. Create your document catalog in the Red Hat OpenShift operator.

```
oc apply -f catalogSource.yaml
```

```

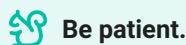
andrewjones@Andrews-MBP watsonxAssistant % oc create namespace wxa4z-byos
namespace/wxa4z-byos created
andrewjones@Andrews-MBP watsonxAssistant % export IBM_CS_ENT_KEY=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpc3MiOiJJQk0gTWFya2V0cGxhY2UiLCJpXXQiOjE2NjYwMTk1ODAsImp0aSI6IjNKOWUyMzzjZTAzMDQzMzVhNTJhYTkzMWNmOTcyMDR1In0.4M3XRD4XzkHMS0kFNJ4uKvcWZ6SnEA0Z03eL_11A2XY
andrewjones@Andrews-MBP watsonxAssistant % oc -n wxa4z-byos create secret docker-registry icr-pull-secret --docker-server=cp.icr.io --docker-username=cp --docker-password=$IBM_CS_ENT_KEY
secret/icr-pull-secret created
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % oc apply -f catalogSource.yaml
catalogsource.operator.coreos.com/ibm-wxa4z-operator-catalog created:
andrewjones@Andrews-MBP watsonxAssistant %

```

8. In the Red Hat OpenShift web console, click **OperatorHub** and select the **wxa4z-byos** project.

The screenshot shows the Red Hat OpenShift web console interface. The left sidebar has a navigation menu with items like Home, Operators, Workloads, Networking, Storage, Builds, Observe, Compute, User Management, and Administration. The 'Operators' section is currently selected. The main content area displays a list of operators under the heading 'Available Operators'. One operator, 'ibm-wxa4z-operator-catalog', is highlighted with a green border. Other operators listed include openshift-node, openshift-nutanix-infra, openshift-oauth-apiserver, openshift-openstack-infra, openshift-operator-lifecycle-manager, openshift-operators, openshift-ovirt-infra, openshift-ovn-kubernetes, openshift-route-controller-manager, openshift-service-ca, openshift-service-ca-operator, openshift-user-workload-monitoring, openshift-vsphere-infra, and techzone-infra. Below the operator list, there's a search bar with 'wxa4z-byos' typed in, and a 'Create Project' button. The top right corner shows the user is logged in as 'kubeadmin'.

9. Enter **ibm watsonx** in the search field and the click the **IBM watsonx Assistant for Z Operator Catalog** tile.



It may take a minute or two for the **IBM watsonx Assistant for Z Operator Catalog** tile to appear.

Note: The current version of the operator may differ than the one shown in the image below.

You are logged in as a temporary administrative user. Update the cluster OAuth configuration to allow others to log in.

Project: wxa4z-byos

OperatorHub

Discover Operators from the Kubernetes community and Red Hat partners, curated by Red Hat. You can purchase commercial software through Red Hat Marketplace. You can install Operators on your clusters to provide optional add-ons and shared services to your developers. After installation, the Operator capabilities will appear in the Developer Catalog providing a self-service experience.

All Items All Items

Search: ibm watsonx

1 items

IBM watsonx Assistant for Z Operator Catalog
IBM watsonx Assistant for Z provided by IBM
IBM watsonx Assistant for Z Operator

10. Click Install.

You are logged in as a temporary administrator.

Project: wxa4z-byos

OperatorHub

Discover Operators from the Kubernetes community and Red Hat partners, curated by Red Hat. You can purchase commercial software through Red Hat Marketplace. You can install Operators on your clusters to provide optional add-ons and shared services to your developers. After installation, the Operator capabilities will appear in the Developer Catalog providing a self-service experience.

All Items All Items

Search: ibm watsonx

IBM watsonx Assistant for Z
2.0.1 provided by IBM

Install

Channel: stable

Version: 2.0.1

Capability level:

- Basic Install
- Seamless Upgrades
- Full Lifecycle
- Deep Insights
- Auto Pilot

Source: IBM watsonx Assistant for Z Operator Catalog

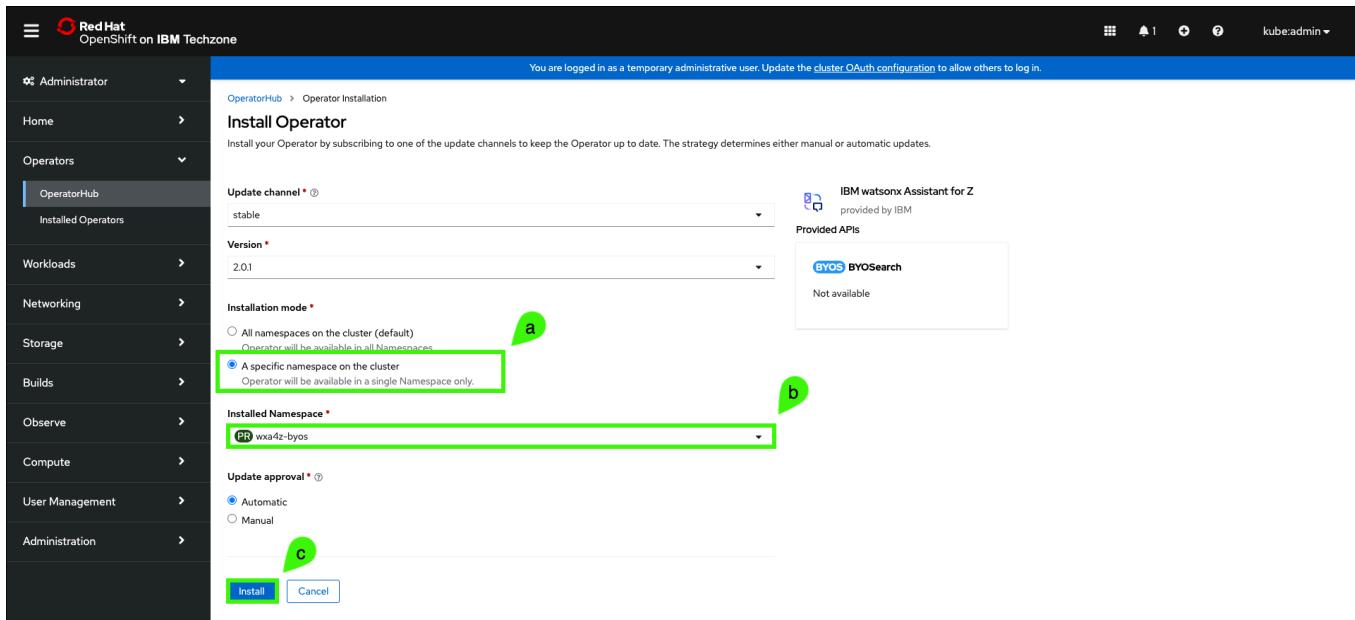
Provider: IBM

Repository: N/A

Container Image: N/A

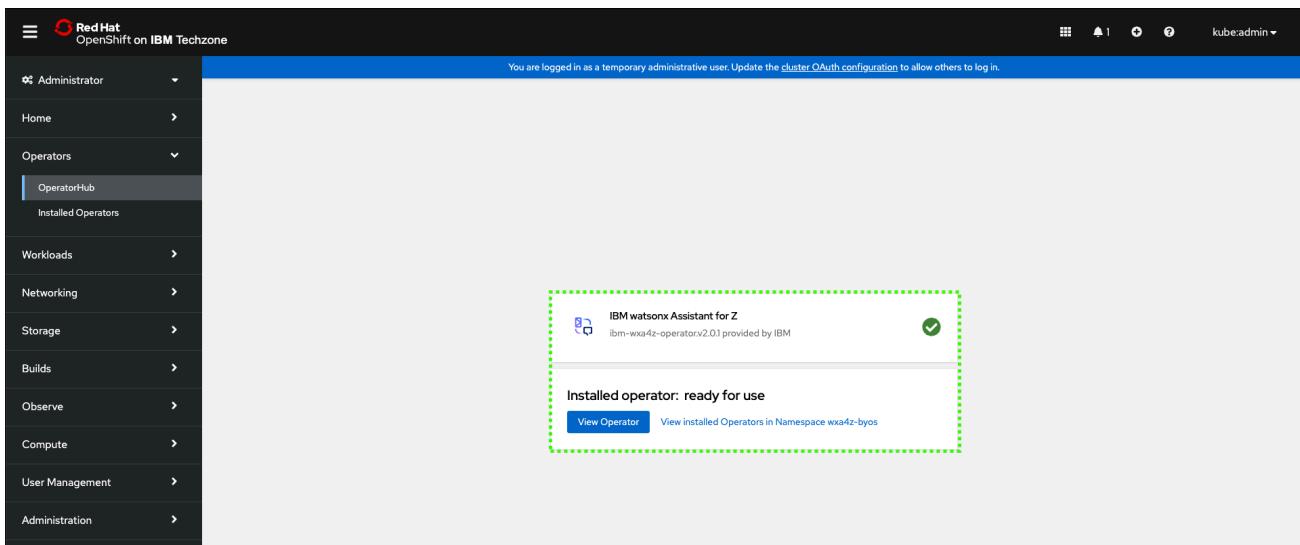
Created at: Oct 4, 2024, 1:31 PM

11. Select A specific namespace on the cluster (a) under Installation mode and wxa4z-byos (b) for the Installed Namespace, then click Install (c).



Do not continue until...

The installation process takes a few minutes. Do not continue until you see the following message: **Installed operator: ready for use.**



- In your command prompt or terminal window, run the following commands to add the Container Registry credential to the operator's service account.

```
oc project wxa4z-byos
```

```
oc patch serviceaccount ibm-wxa4z-operator-controller-manager --type merge -p
'{"imagePullSecrets": [{"name": "icr-pull-secret"}]}'
```

```
watsonxAssistant -- cecuser@p1365-pvm1:~ -zsh - 135x37
andrewjones@Andrews-MBP watsonxAssistant % oc create namespace wxa4z-byos
namespace/wxa4z-byos created
andrewjones@Andrews-MBP watsonxAssistant % export IBM_CS_ENT_KEY=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.eyJpc3MiOiJJQk0gTWFya2V0cGxhY2UiLCJpYXQiOjE2NjYwMTk1ODAsImp0aS16IjNkOWUyMzjZTAzMDQzMzVhNTJhYTkzMWNmOTcyMDR1In0.4M3XRD4XzkHMSOkFNJ4uKVcwZ6SnEAZO3eL_11A2xY
andrewjones@Andrews-MBP watsonxAssistant % oc -n wxa4z-byos create secret docker-registry icr-pull-secret --docker-server=cp.icr.io --docker-username=cp --docker-password=$IBM_CS_ENT_KEY
secret/icr-pull-secret created
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % oc apply -f catalogSource.yaml
catalogsource.operator.coreos.com/ibm-wxa4z-operator-catalog created
andrewjones@Andrews-MBP watsonxAssistant % oc project wxa4z-byos
Now using project "wxa4z-byos" on server "https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443".
andrewjones@Andrews-MBP watsonxAssistant % oc patch serviceaccount ibm-wxa4z-operator-controller-manager --type merge -p '{"imagePullSecrets": [{"name": "icr-pull-secret"}]}'
serviceaccount/ibm-wxa4z-operator-controller-manager patched
andrewjones@Andrews-MBP watsonxAssistant %
```

13. In the Red Hat OpenShift web console, under Workloads, click Pods.

The screenshot shows the Red Hat OpenShift web console interface. The left sidebar has a navigation tree with 'Administrator', 'Home', 'Operators' (selected), 'OperatorHub' (highlighted with a blue bar), 'Installed Operators', 'Workloads' (selected), 'Pods' (highlighted with a green box), 'Deployments', 'DeploymentConfigs', 'StatefulSets', and 'Secrets'. The main content area displays a card for 'IBM watsonx Assistant for Z' with the subtext 'ibm-wxa4z-operator/v2.01 provided by IBM' and a green checkmark icon. A status bar at the bottom says 'Installed Operator ready for use'.

14. Verify the two pods that start with ibm-wxa4z-operator have a status of Running and that all pods are Ready.

The screenshot shows the Red Hat OpenShift web console interface. The left sidebar has a navigation tree with 'Administrator', 'Home', 'Operators', 'OperatorHub', 'Installed Operators', 'Workloads' (selected), 'Pods' (highlighted with a green box), 'Deployments', 'DeploymentConfigs', 'StatefulSets', and 'Secrets'. The main content area shows a table of pods in the 'wxa4z-byos' project. The table columns are Name, Status, Ready, Restarts, Owner, Memory, CPU, and Created. Two pods are listed: 'ibm-wxa4z-operator-catalog-n9m5m' and 'ibm-wxa4z-operator-controller-manager-7c7898d7d4-87htm', both marked as 'Running' with green boxes around them. A 'Create Pod' button is visible in the top right of the main content area.

15. Run the following command to set the administrative policy for the workspace.

```
oc -n wxa4z-byos adm policy add-scc-to-user privileged -z byos
```

```
watsonxAssistant@Andrews-MBP watsonxAssistant % oc create namespace wxa4z-byos
namespace/wxa4z-byos created
andrewjones@Andrews-MBP watsonxAssistant % export IBM_CS_ENT_KEY=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9eyJpc3MiOiJJQk0gTWFya2V0cGxhY2UiLCJpYXQiOjE2NjYwMTk1ODAsImp0aSI6ijNkOWUyMzJzTAzMDQzMzvhNTJhYTkzMWNmOTcyMDR1In0.4M3XRD4XzkHMS0kFNJ4uKVcWZ6SnEA0Z03eL_11A2xY
andrewjones@Andrews-MBP watsonxAssistant % oc -n wxa4z-byos create secret docker-registry icr-pull-secret --docker-server=cp.icr.io --docker-username=cp --docker-password=$IBM_CS_ENT_KEY
secret/icr-pull-secret created
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % vi catalogSource.yaml
andrewjones@Andrews-MBP watsonxAssistant % oc apply -f catalogSource.yaml
catalogsource.operator.coreos.com/ibm-wxa4z-operator-catalog created
andrewjones@Andrews-MBP watsonxAssistant % oc project wxa4z-byos
Now using project "wxa4z-byos" on server "https://api.672371d38376796fb96a6c4d.ocp.techzone.ibm.com:6443".
andrewjones@Andrews-MBP watsonxAssistant % oc patch serviceaccount ibm-wxa4z-operator-controller-manager --type merge -p '{"imagePullSecrets": [{"name": "icr-pull-secret"}]}'
serviceaccount/ibm-wxa4z-operator-controller-manager patched
andrewjones@Andrews-MBP watsonxAssistant % oc -n wxa4z-byos adm policy add-scc-to-user privileged -z byos
clusterrole.rbac.authorization.k8s.io/system:openshift:scc:privileged added: "byos"
andrewjones@Andrews-MBP watsonxAssistant %
```

Deploy required secrets and the custom bring-your-own-search (BYOSearch) resources

1. In a text editor, create a file named `os-secret.yaml` and paste the following text in the file.

File name:

```
os-secret.yaml
```

Substitute a secure password of your choosing for the string `<OPENSEARCH_PASSWORD>`.

File contents:

```
apiVersion: v1
stringData:
  password: <OPENSEARCH_PASSWORD>
kind: Secret
metadata:
  name: opensearch-creds
  namespace: wxa4z-byos
type: Opaque
```

2. Create the secret by running the following command.

```
oc apply -f os-secret.yaml
```

3. In a text editor, create a file named `client-ingestion-secret.yaml` and paste the following text in the file.

File name:

```
client-ingestion-secret.yaml
```

Substitute a secure authentication key of your choosing for the string `<CLIENT_INGESTION_AUTHKEY>`. The authentication key can be a random password.

File contents:

```
apiVersion: v1
stringData:
  authkey: <CLIENT_INGESTION_AUTHKEY>
kind: Secret
metadata:
  name: client-ingestion-authkey
  namespace: wxa4z-byos
type: Opaque
```

4. Create the secret by running the following command.

```
oc apply -f client-ingestion-secret.yaml
```

5. Obtain and record your cluster domain that is used for routes by running the following command.

```
oc -n openshift-ingress-operator get ingresscontroller default -o jsonpath=".status.domain"
```



The output from the command does not include a newline.

The value returned for the cluster domain does not include a newline. When copying the value do not include the character or characters used for your command line prompt. Do not include the your prompt in the next step!

Note: The output of the command will be a string similar to:

apps.672b79320c7a71b728e523b4.ocp.techzone.ibm.com

6. In a text editor, create a file named `byos.yaml` and paste the following text in the file.

File name:

```
byos.yaml
```

Substitute the domain name recorded in the previous step for the string `<YOUR_CLUSTER_DOMAIN>`.

File contents:

```

apiVersion: wxa4z.watsonx.ibm.com/v1
kind: BYOSearch
metadata:
  name: byosearch
  namespace: wxa4z-byos
spec:
  imagePullSecrets:
    - name : icr-pull-secret
  namespace: wxa4z-byos
  clusterName: wxa4z-byos-cluster
  clusterDomain: <YOUR_CLUSTER_DOMAIN>

  opensearch:
    secretName: opensearch-creds

  persistence:
    enabled: true
    storageClass: "managed-nfs-storage"
    accessModes:
      - ReadWriteOnce
    size: 24Gi

  wrapper:
    createRoute: true
    resources:
      requests:
        cpu: 4
        memory: "500Mi"
      limits:
        cpu: 4
        memory: "1Gi"

  clientIngestion:
    secretName: client-ingestion-authkey

    resources:
      limits:
        cpu: "500m"
        memory: 2Gi
        nvidia.com/gpu: "0"
      requests:
        cpu: "500m"
        memory: 1Gi
        nvidia.com/gpu: "0"
    pvc:
      storageClass: "managed-nfs-storage"
      enabled: true
      size: 24Gi

```

7. Run the following command to deploy BYOS on your cluster.

```
oc apply -f byos.yaml
```

Verify all the required pods are running and get the network route to your BYOS instance

1. In the OCP console, verify that all pods have the status of **Running** or **Completed**.

⚠️ Do not continue until...

The BYOS deployment can take 20 minutes or more to complete. Do not continue until all the pods have a status of "Running" or "Completed". The next step is to retrieve your BYOS endpoint URL.

Name	Status	Ready	Restarts	Owner	Memory	CPU	Created
da80909aab1563ff0c15b7c6d	Completed	0/1	0	ds80909aab1563ff0c15b7c6da81 a8bbefabaa605065bb6c6b490e87 f067f45	-	-	Nov 6, 2024, 9:26 AM
ibm-wxa4z-operator-catalog-cfvsv	Running	1/1	0	CS ibm-wxa4z-operator-catalog	25.0 MiB	0.004 cores	Nov 6, 2024, 9:25 AM
ibm-wxa4z-operator-controller-manager-556fcf98bb-4bhmk	Running	2/2	0	RS ibm-wxa4z-operator-controller-manager-556fcf98bb	142.8 MiB	0.023 cores	Nov 6, 2024, 9:26 AM
wxa4z-byos-cluster-0	Running	1/1	0	SS wxa4z-byos-cluster	1,095.8 MiB	0.017 cores	Nov 6, 2024, 10:22 AM
wxa4z-byos-cluster-1	Running	1/1	0	SS wxa4z-byos-cluster	1,169.1 MiB	0.016 cores	Nov 6, 2024, 10:22 AM
wxa4z-byos-cluster-2	Running	1/1	0	SS wxa4z-byos-cluster	1,113.3 MiB	0.015 cores	Nov 6, 2024, 10:22 AM
wxa4z-client-ingestion-7f98d86c58-9bzth	Running	1/1	0	RS wxa4z-client-ingestion-7f98d86c58	501.8 MiB	0.071 cores	Nov 6, 2024, 12:18 PM
wxa4z-opensearch-wrapper-5cb879f5f8-qw7qt	Running	1/1	0	RS wxa4z-opensearch-wrapper-5cb879f5f8	547.1 MiB	0.031 cores	Nov 6, 2024, 10:22 AM
wxa4z-snapshot-setup-job-nsqtz	Completed	0/1	0	U wxa4z-snapshot-setup-job	-	-	Nov 6, 2024, 10:22 AM

2. Under **Networking**, click **Routes**.

Name	Status	Ready	Restarts	Owner	Memory	CPU	Created
da80909aab1563ff0c15b7c6d	Completed	0/1	0	da80909aab1563ff0c15b7c6da81 a8bbefabaa605065bb6c6b490e87 f067f45	-	-	Nov 6, 2024, 9:26 AM
ibm-wxa4z-operator-catalog-cfvsv	Running	1/1	0	CS ibm-wxa4z-operator-catalog	25.0 MiB	0.004 cores	Nov 6, 2024, 9:25 AM
ibm-wxa4z-operator-controller-manager-556fcf98bb-4bhmk	Running	2/2	0	RS ibm-wxa4z-operator-controller-manager-556fcf98bb	141.2 MiB	0.022 cores	Nov 6, 2024, 9:26 AM
wxa4z-byos-cluster-0	Running	1/1	0	SS wxa4z-byos-cluster	1,095.8 MiB	0.016 cores	Nov 6, 2024, 10:22 AM
wxa4z-byos-cluster-1	Running	1/1	0	SS wxa4z-byos-cluster	1,169.1 MiB	0.016 cores	Nov 6, 2024, 10:22 AM
wxa4z-byos-cluster-2	Running	1/1	0	SS wxa4z-byos-cluster	1,113.3 MiB	0.015 cores	Nov 6, 2024, 10:22 AM
wxa4z-client-ingestion-7f98d86c58-9bzth	Running	1/1	0	RS wxa4z-client-ingestion-7f98d86c58	534.6 MiB	0.087 cores	Nov 6, 2024, 12:18 PM
wxa4z-opensearch-wrapper-5cb879f5f8-qw7qt	Running	1/1	0	RS wxa4z-opensearch-wrapper-5cb879f5f8	547.1 MiB	0.030 cores	Nov 6, 2024, 10:22 AM
wxa4z-snapshot-setup-job-nsqtz	Completed	0/1	0	U wxa4z-snapshot-setup-job	-	-	Nov 6, 2024, 10:22 AM

3. Copy and record the location for the **wxa4z-opensearch-wrapper** route.

Name	Status	Location	Service
wxa4z-client-ingestion	Accepted	https://wxa4z-client-ingestion-wxa4z-byos.apps.672b79320c7a71b728e523b4.ocp.techzone.ibm.com	wxa4z-client-ingestion
wxa4z-opensearch-wrapper	Accepted	https://wxa4z-opensearch-wrapper-wxa4z-byos.apps.672b79320c7a71b728e523b4.ocp.techzone.ibm.com	wxa4z-opensearch-wrapper

Update your assistant with the new BYOS instance route

You are now ready to configure your assistant with the route to your BYOS instance.

1. Using the network route for your BYOS instance, append the string **/v1/query** to complete the URL endpoint.

The URL should look similar to:

```
https://wxa4z-opensearch-wrapper-wxa4z-
byos.apps.672b79320c7a71b728e523b4.ocp.techzone.ibm.com/v1/query
```

Important: The above URL will not work for you. Use the value of your specific OpenSearch instance that is recorded in the previous step.

2. Update your assistant's custom search integration URL.

Next, you need to return to your assistant in the watsonx Orchestrate AI assistant builder and update the custom search integration URL. The steps to update the URL are illustrated in the animated gif that follows. You can review the steps to accomplish this [here](#) (be sure to use your BYOS URL and not the shared URL specified in the lab guide).

Name	Status	Location	Service
wxa4z-client-ingestion	Accepted	https://wxa4z-client-ingestion-wxa4z-byos.apps.672b79320c7a7b728e523b4.ocp.techzone.ibm.com	wxa4z-client-ingestion
wxa4z-opensearch-wrapper	Accepted	https://wxa4z-opensearch-wrapper-wxa4z-byos.apps.672b79320c7a7b728e523b4.ocp.techzone.ibm.com	wxa4z-opensearch-wrapper

Troubleshooting

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

✖ Pods have a status of ErrImagePull or ImagePullBackoff

If the pods starting with **ibm-wxa4z-operator** have a status of “ErrImagePull” or “ImagePullBackoff”, you can delete the pod and it will automatically restart and pull the image successfully. Wait until the pod is re-created successfully.

✖ The wxa4z-client-ingestion pod does not start

Did you include the % character in the **clusterDomain** name when creating the **byos.yaml**? To resolve, edit the **byos.yaml** file and run the following command again. The current pod will be terminated and a new one started. This will take about 20 minutes to start.

```
oc apply -f byos.yaml
```

Installing and using zassist to ingest client documents

With bring-your-own-search (BYOS) installed and configured in your assistant, you can now prepare for document ingestion. Currently, only PDF, HTML, and DOCX file formats are supported for ingestion.

To prepare for document ingestion, you can also reference the setup instructions that are located [here](#).

Install the zassist utility

The **zassist** utility is an executable program that automates the ingestion of client documentation into the [RAG](#) for watsonx Assistant for Z. A version of zassist is available for download for IBMers and Business Partners for conducting pilots. Follow the steps below to download and install **zassist**.



How do clients get the zassist utility?

The utility is available to clients through [IBM Passport Advantage](#).

1. Click the following link and download the **zassist.zip** file.

<https://ibm.box.com/s/j3nt5iw4fqd5w2jgcqwxnjlsu8bpvl77>

A screenshot of the Box@IBM web interface. At the top, there's a header with the user's name and a 'Download' button highlighted with a green border. Below the header is a search bar labeled 'Search files and folders'. Underneath the search bar is a list of files. The first item is 'zassist.zip', which has a yellow folder icon next to it. To the right of the file name are columns for 'Name', 'Modified', and 'Size'. The 'Modified' column shows 'Sep 5 at 9:15 AM' and the 'Size' column shows '...'. The entire interface is enclosed in a light blue border.

2. Extract the **zassist.zip** file.
3. Locate the appropriate file for your local workstation's operating system.

Name	Date Modified	Size	Kind
byos.yaml	Today at 12:17 PM	956 bytes	YAML
ca.crt	Today at 11:36 AM	Zero bytes	certificate
catalogCertManager.yaml	Today at 9:15 AM	476 bytes	YAML
catalogSource.yaml	Today at 9:25 AM	397 bytes	YAML
client-ingestion-secret.yaml	Today at 10:05 AM	155 bytes	YAML
os-secret.yaml	Today at 10:04 AM	149 bytes	YAML
zassist	Sep 5, 2024 at 11:15 AM	--	Folder
linux	Sep 18, 2024 at 8:15 AM	--	Folder
mac	Sep 18, 2024 at 8:15 AM	--	Folder
zassist	Sep 18, 2024 at 8:17 AM	10.2 MB	Unix Executable File
mac-arm	Sep 18, 2024 at 8:15 AM	--	Folder
windows	Sep 18, 2024 at 8:15 AM	--	Folder
zassist.zip	Today at 1:47 PM	23 MB	ZIP archive

4. Either copy the appropriate **zassist** file to a directory in your PATH, or add the appropriate directory to your PATH environment variable.

Additional information for running the preceding tasks can be found [here](#).

5. Run the **zassist** command to verify it is working.

```
zassist
```

```
andrewjones@Andrews-MacBook-Pro watsonxAssistant % PATH=$PATH:./zassist
zassist: error: expected one of "version", "init", "login", "ingest", "load", ...
andrewjones@Andrews-MacBook-Pro watsonxAssistant %
```



Mac/OS users may need to adjust security settings.



The **zassist** binary may cause a security exception. Adjust the security settings by opening the **System Settings** utility and clicking **Privacy & Security**. Under **Security** locate the message about the **zassist** binary and click **Allow Anyway**. Return to the terminal window and try running the command again.

Ingest client documentation using zassist

With the **zassist** command installed, you are now able to begin ingesting data.

Step-by-step guidance for ingesting documents using zassist is provided in the IBM watsonx Assistant for Z documentation.

Follow the directions [here](#) to ingest documents using zassist.

These steps are not repeated in this lab guide. The following video illustrates the steps to ingest a single document. The document that is ingested in the video is a compressed PDF of the **IBM z/OS Continuous Delivery Red Piece**. You can download a copy of this document [here](#).

Note: The video has no audio.

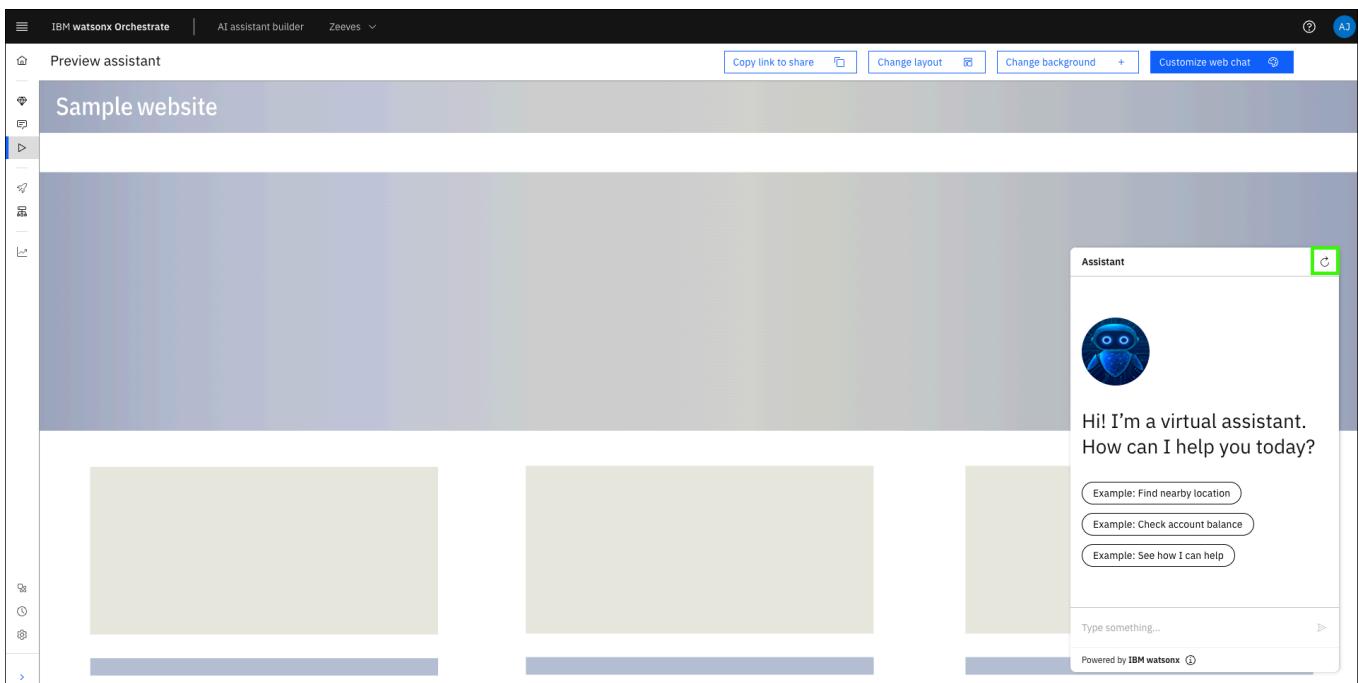
i Don't see the video in the PDF version of the lab guide? ▼

If you are viewing the [PDF](#) of the lab guide, you can access the video [here](#).

Verify the document that is ingested is now returned as a source file for a query

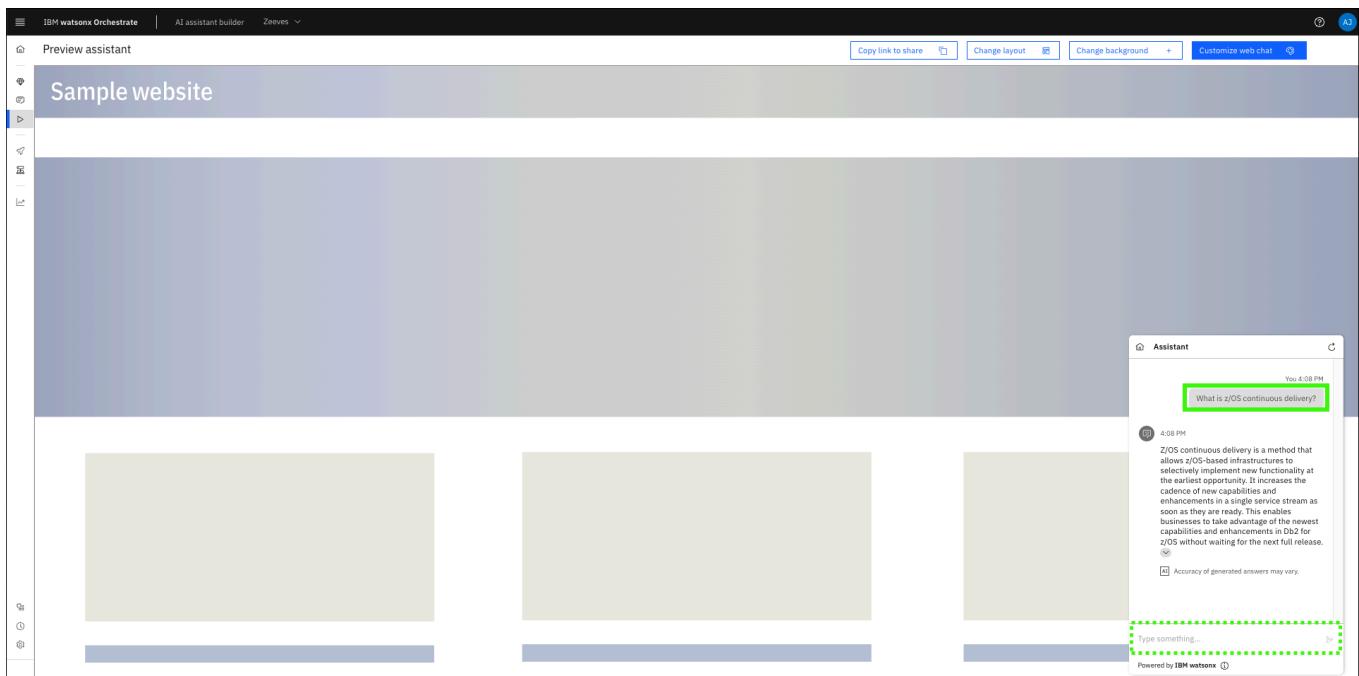
Use the watsonx Orchestrate AI assistant builder to verify your document ingestion.

1. Hover over the **Home** () icon and click **Preview**.
2. Click the **Restart conversation** () icon.

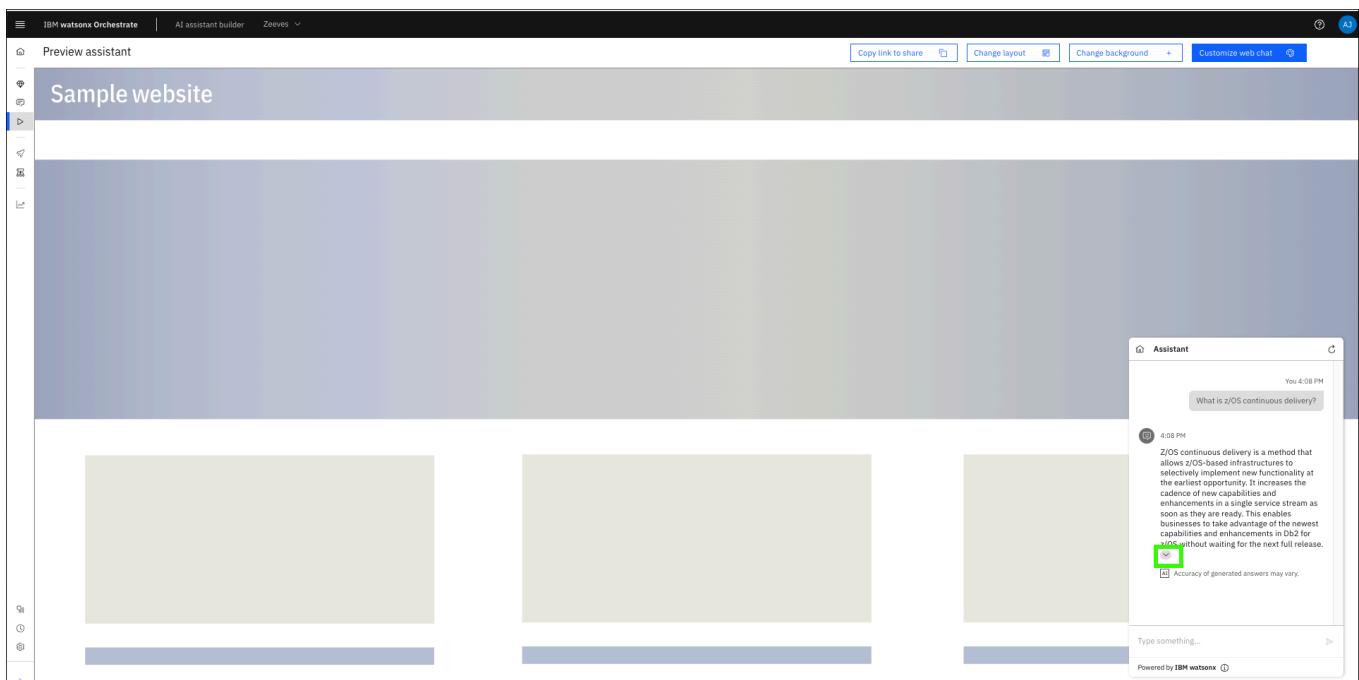


3. Enter the following prompt in your assistant.

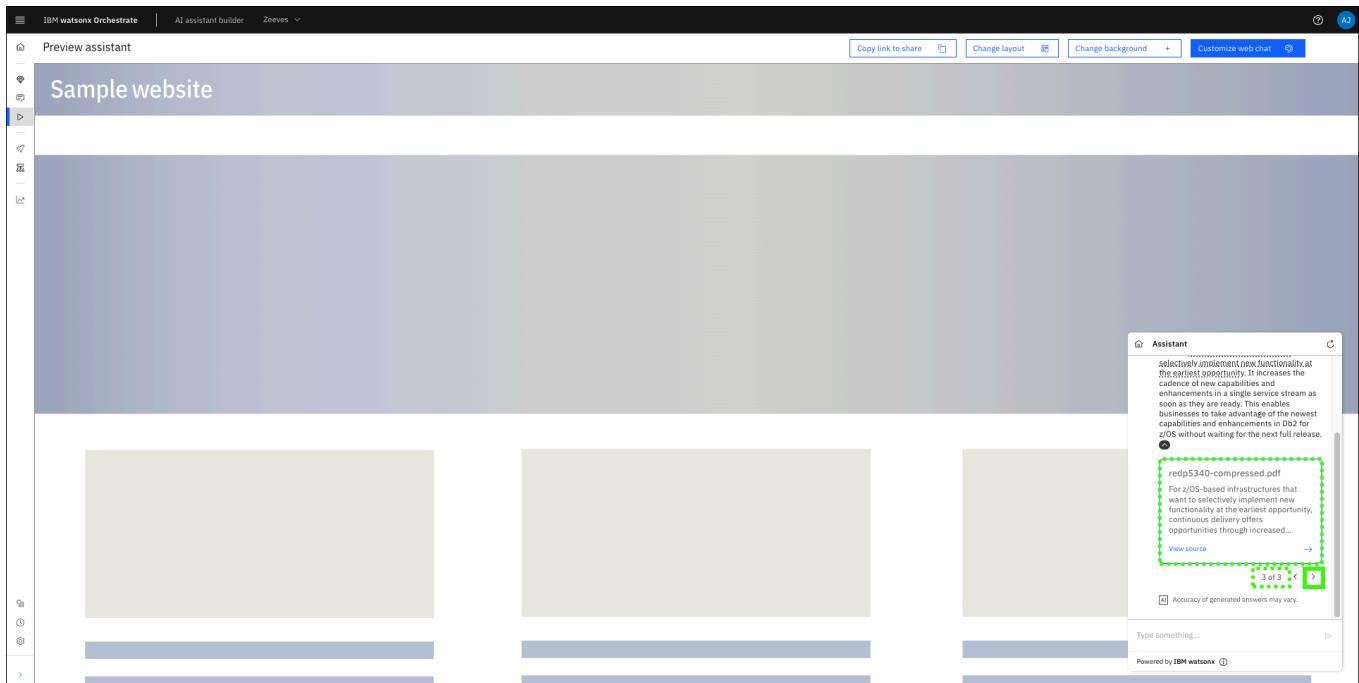
What is z/OS continuous delivery?



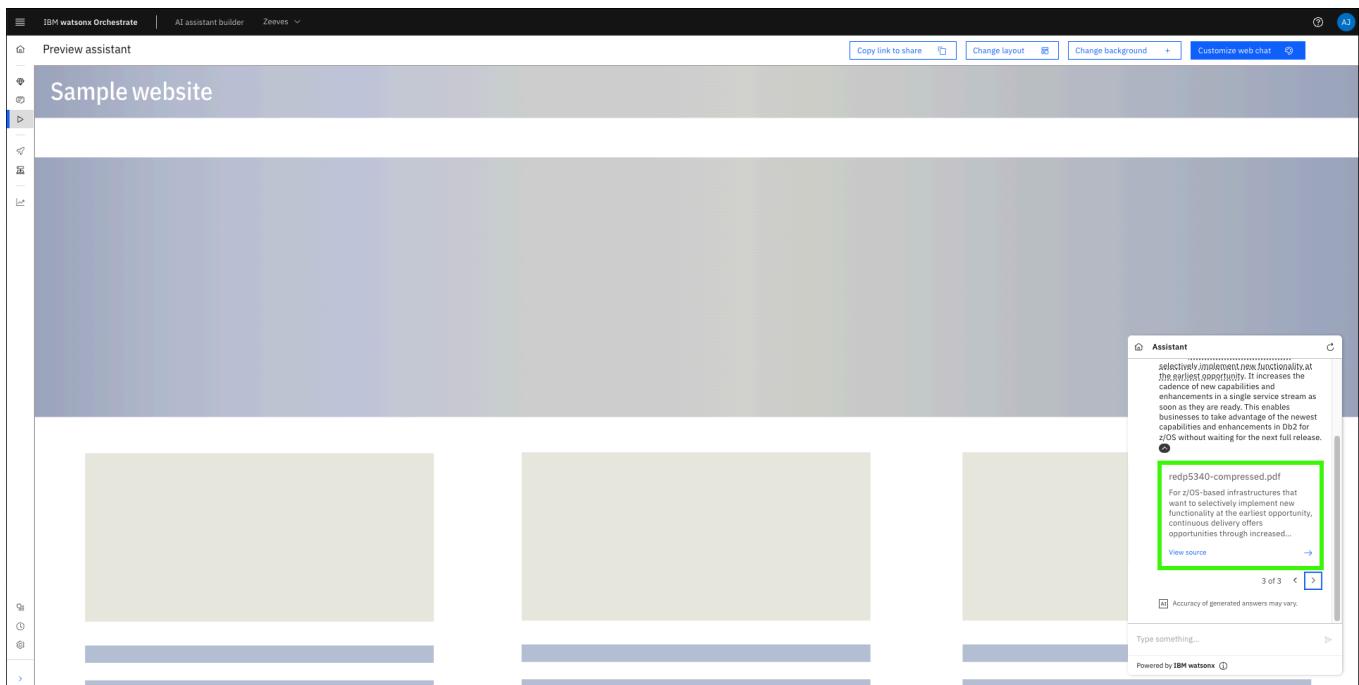
4. Clicking the Down arrow (▼).



5. Click through the list of resources and find the reference to the Red Piece document you ingested.

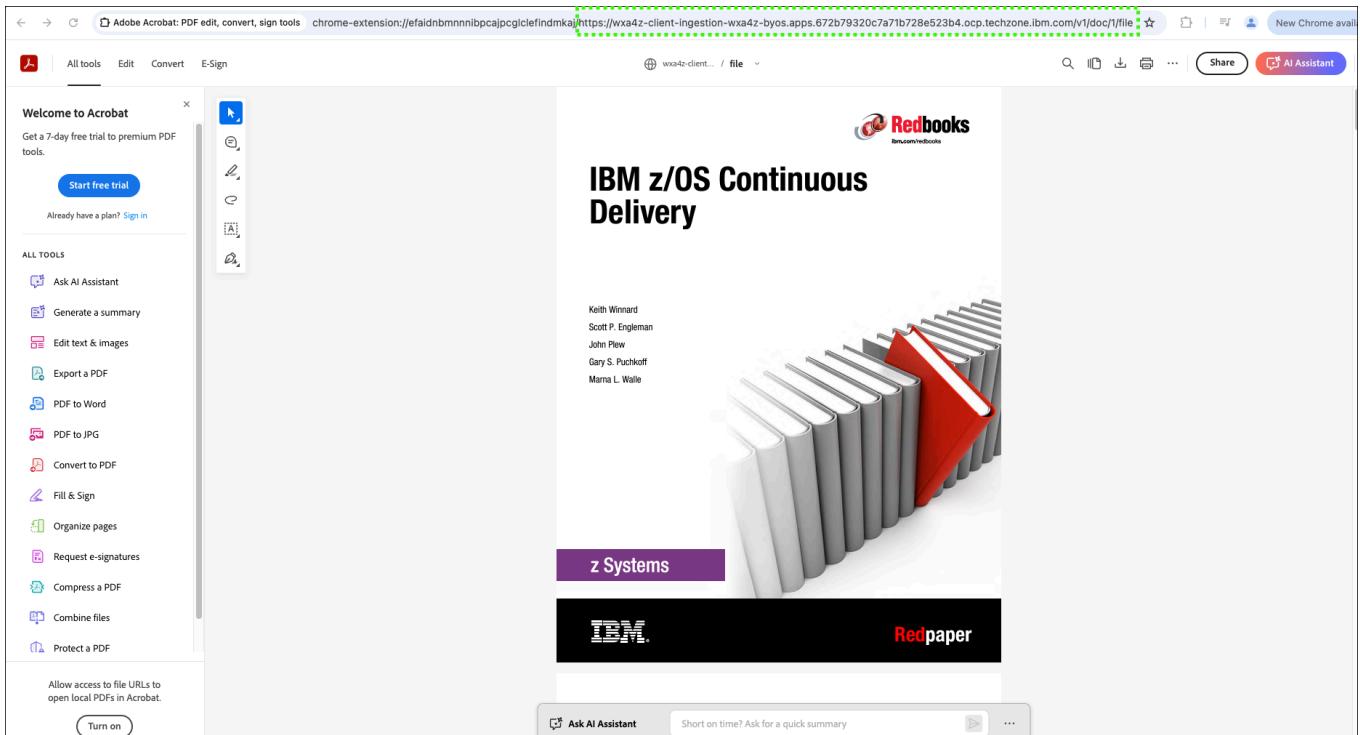


6. Click the ingested document reference.



7. Accept the security risk to view the source document.

The steps to accept the security risk for the document are not shown. The risk occurs because the certificate for the connection to the SNO instance is not secure. Notice that the URL contains the path to your SNO instance route.



Adjusting the search behavior

Do you recall the **Metadata** field when you configured your assistant?

Custom service Draft

Settings Instance

even if the user has moved on.

Define the text for the citations title. ⓘ

How do we know?

Tendency to say "I don't know"

Rarely	Less often	More often	Most often
--------	------------	------------	------------

Generated response length ⓘ

Concise	Moderate	Verbose
---------	----------	---------

Default filter

Can be anything (plain text, JSON, etc)

Metadata

```
JSON example:
{
  "example_field": "example_value",
  "other_example_field": 7
}
```

Search display text

Define the text your search will display to the end user

No results found Connectivity issue

I searched my knowledge base, but did not find anything related to your query

The Metadata field provides a way to adjust your assistant's behavior during conversational search for your OpenSearch instance. Now that you have your own docs that are ingested for conversational search, you can set the metadata field for your assistant to use those documents in its content-grounded search. If you leave the metadata field empty, then it defaults to settings found to perform well. This replaces having to paste a complicated search string.

If you leave this field empty, OpenSearch will rely on the default settings, which means OpenSearch will search all of the default IBM-provided documentation and all of the ingested customer documentation using the following value:

```
{"ibm_indices": "*_ibm_docs_slate",
"customer_indices": "customer_*"}
```

Replacing the wildcard string with an explicit list of indices allows for personalization. The metadata setting is where you can input specific indices (pointing to the underlying documentation) that you want your assistant to use for the content-grounded search. There are over 220 products and topics that the OpenSearch instance has IBM Documentation for. You can find those indices and products [here](#).

You can input a subset of indices into the “Metadata” field in cases where you only want your assistant to gather context for specific IBM products or topics. The specific indices can be listed out in this format:

```
{"ibm_indices": "<comma separated index values>", "customer_indices": "customer_*"}
```

For example, if you only want your assistant to reference documentation for “Db2 Analytics Accelerator for z/OS” and no ingested client documentation, you can enter the following into the metadata field:

```
{"ibm_indices": "ss4lq8_ibm_docs_slate"}
```

If you have a mix of IBM Documentation and client documentation ingested, then there’s an optional search string that you can use to set the “weights” used for each.

For example:

```
{"doc_weight":
{"product_docs":0.5,
 "customer_docs":0.5},
"ibm_indices": "*_ibm_docs_slate",
"customer_indices": "customer_*"
}
```

In this case, “product_docs” is the weight that is assigned to “ibm_indices” and “customer_docs” is the weight that is assigned to “customer_indices”.

After you have configured all the settings for Conversational Search on the page, be sure to click **Save** in the upper-right of the page.

For more information on customizing the metadata field for conversational search, refer to this supplemental video found [here](#).

You are encouraged to experiment with the metadata field!

Try setting the metadata field to the following, which weights ingested docs higher than the product docs:

```
{"doc_weight":  
{"product_docs":0.2,  
 "customer_docs":0.8},  
"ibm_indicies":"*_ibm_docs_slate",  
"customer_indicies":"customer_*"  
}
```

Repeat the earlier steps to restart the assistant preview (⟳) and reissue your queries. Notice that the ingested Red Piece document is now the first sited reference!

For client pilots

If you or your client have other documents to ingest, you can do so by repeating the steps using zassist. The Velocity Pilot ITZ environment is limited in compute and storage capacity. The following limits should be adhered to:

- Greater than 15,000 documents is not supported.
- Individual documents should be less than 10 megabytes (MB).
- Larger documents greater than 50 MB should work if the document contains mostly images.
- Loading documents can take a long time, especially with > 100 MB of text.
- It is recommended to run large loads late at night.
- When loading, ensure your workstations does not sleep during the process.
- If you receive a **batch time error**, set the batch size to a lower number for that command. For example:

```
zassist ingest . -s 50
```

After ingesting all your additional documents, proceed to the next section to learn about adding skills to your assistant.

Adding skills to the assistant

Getting started with skills and actions

Watsonx Assistant for Z can import skills to automate a range of IBM Z related tasks through assistant interactions. Each skill is a pre-defined automation that runs tasks to accomplish some unit or units of work. For example, you can use a skill to view z/OS IPL information, or work with z/OS datasets.

IBM Watsonx Assistant for Z provides an extension within Watsonx Orchestrate to build new skills from Ansible Automation platform or z/OS Management Facility (z/OSMF). The Z Skills Accelerator extension connects Ansible and z/OS application programming interfaces (APIs) and can import automation as Ansible Playbooks, JCL, or REXX as skills. Learn more importing and building skills [here](#).

Environments

Watsonx Orchestrate

The Z Skills Accelerator extension is already configured in your Watsonx Orchestrate IBM Technology Zone (ITZ) environment. You can use this component to import new skills.

Ansible Automation Platform and Wazi as a Service

To import skills for automations, you use Ansible Automation Platform (AAP) and Wazi as a Service (Wazi aaS) to serve as the z/OS back-end. Learn more about AAP [here](#). Learn more about Wazi, [here](#).

The two resources are provisioned together in the ITZ environment that you reserved earlier. This environment enables the ability to manage and automate z/OS tasks and subsystems with various preinstalled ansible playbooks. It includes a z/OS back-end (Wazi as a Service) with all needed prerequisites.

The playbooks provided cover various use cases for automating z/OS management. Ansible's capabilities for automating various Z-specific tasks are not limited to the use cases that are preinstalled in the AAP instance. The preinstalled playbooks are tasks from the 'IBM z/OS core collection'. Using this environment accelerates the ability to showcase the value of Watsonx Assistant for Z, and to get started with simple automations that can be expanded.

The ITZ environment gives you access to AAP, which is preconfigured to target the accompanying z/OS Wazi system, along with web-based access to AAP to experiment with different playbook templates. These templates are imported into Watsonx Orchestrate as skills and connected to your assistant.

For more information on the AAP and Wazi z/OS environments, refer to this document.

The playbook templates that are preinstalled in AAP cover various use cases, which you can explore, including:

- z/OS Certificate Management (create, delete, list, and renew certificates)
- dataset management (create, delete, fetch datasets)
- Submit JCL
- Run Operator commands

- Run TSO commands
- And more

Each of the sections that follow build upon each other. Complete each to successfully enhance your assistant by starting with [Explore Ansible Automation Platform](#).

Explore Ansible Automation Platform

After you reserved the Ansible Automation Platform (AAP) and Wazi z/OS environment in IBM Technology Zone (ITZ) and the reservation is in the **Ready** state, follow these steps to explore AAP.

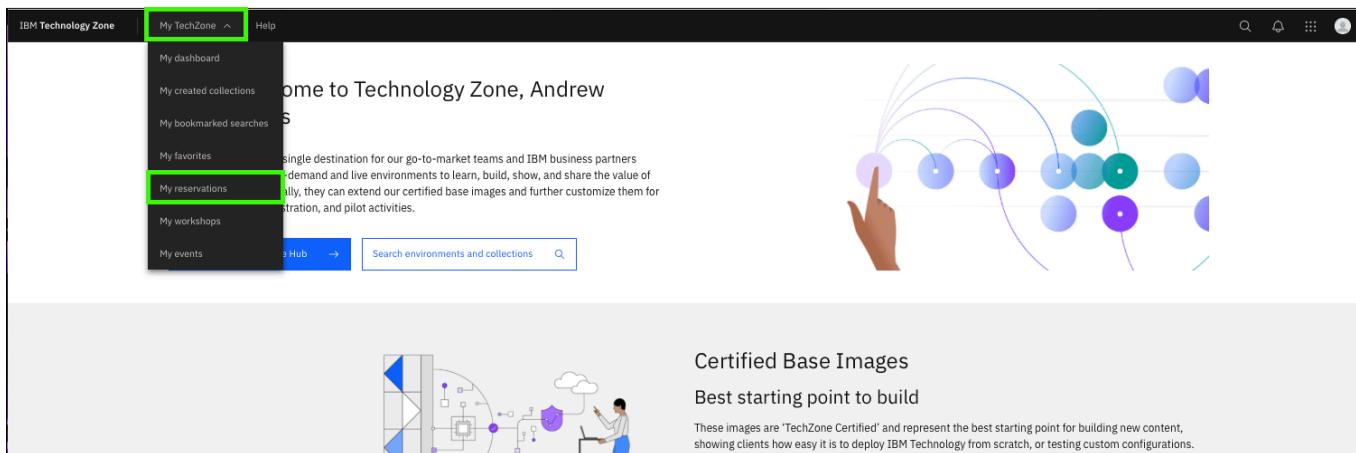
Access the AAP and Wazi as a Service environment

Be sure to record the information as instructed

Several of the steps below instruct you to record values from your ITZ reservation. Be sure to do this as they will not only be used in this section, but also in later sections of the lab guide.

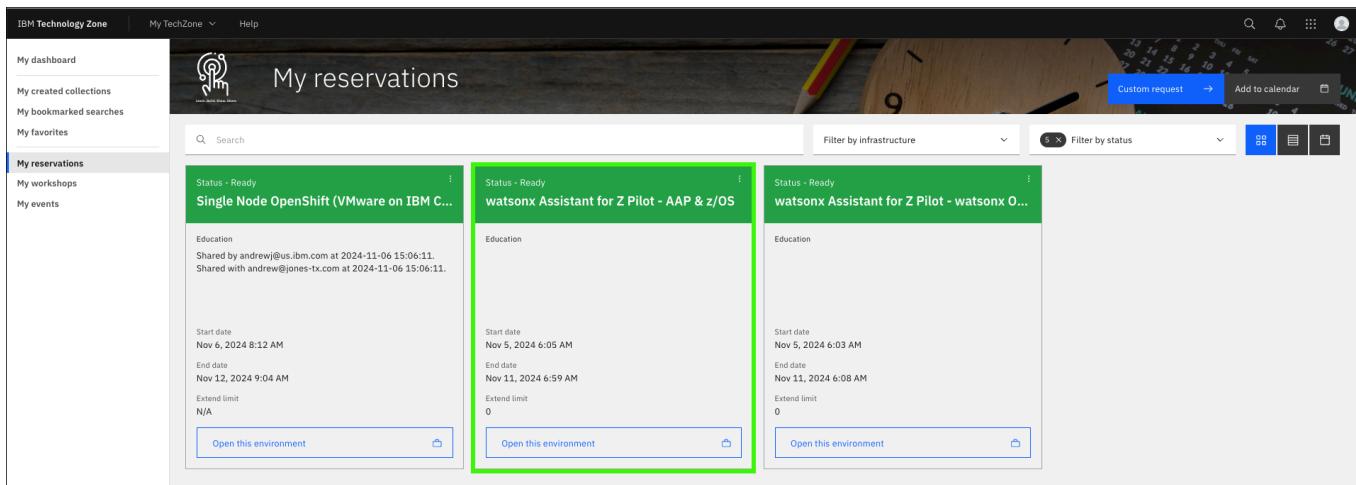
1. In the IBM Technology Zone portal, expand **My TechZone** and select **My Reservations**, or click the following link.

[ITZ My reservations](#)

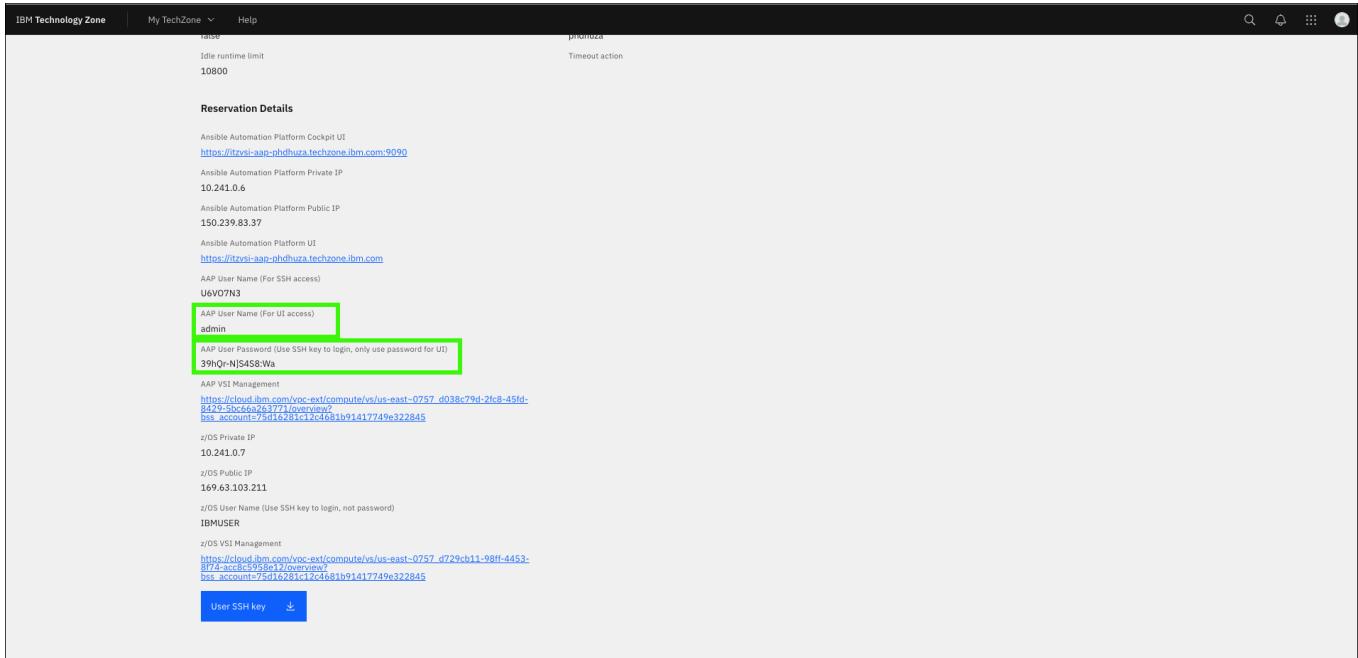


Certified Base Images
Best starting point to build
These images are "TechZone Certified" and represent the best starting point for building new content, showing clients how easy it is to deploy IBM Technology from scratch, or testing custom configurations.

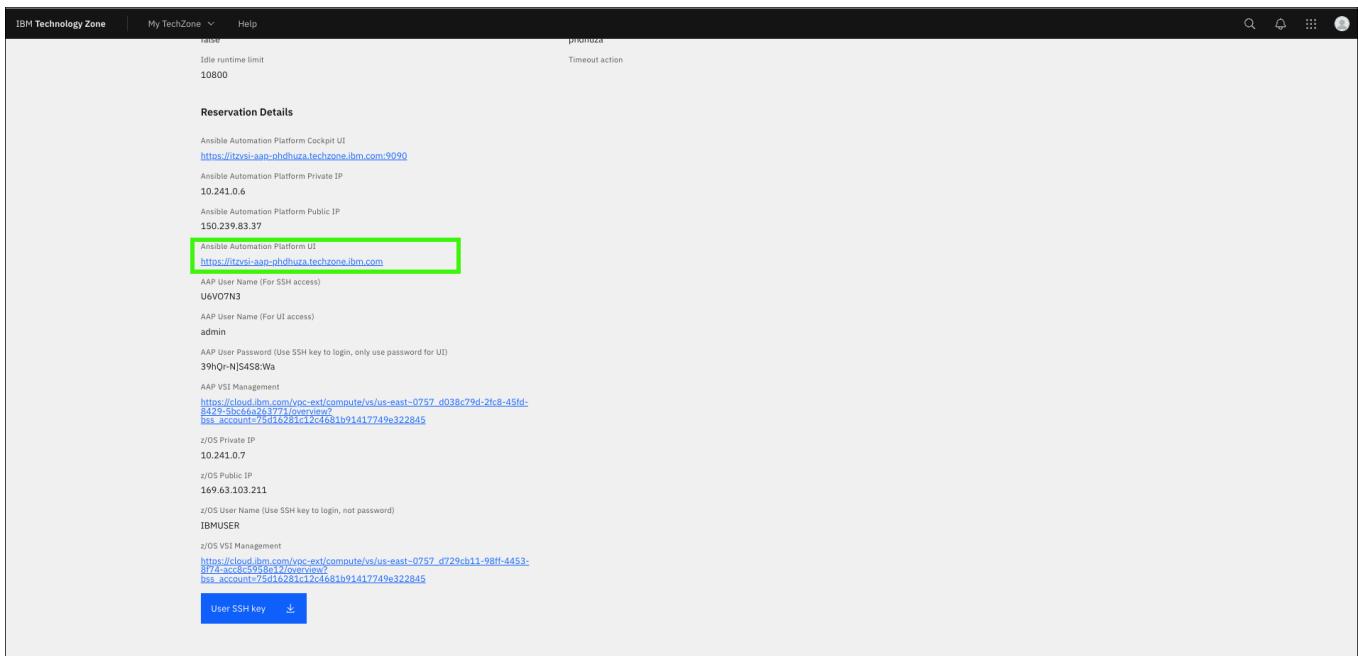
2. Click the **watsonx Assistant for Z Pilot - AAP & z/OS** tile.



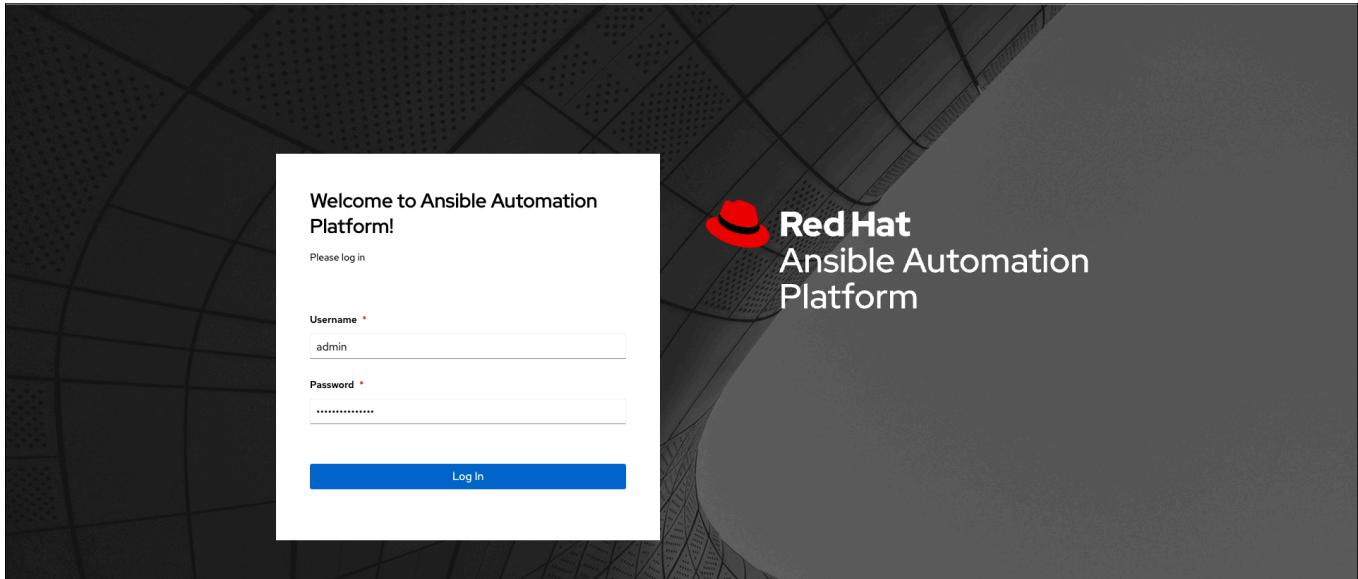
3. Locate and record the **AAP User Name (For UI access)** and **AAP User Password** fields.



4. Record and then click the Ansible Automation Platform UI link.



5. Enter the **Username** and **Password** that is recorded in step 3 and click **Log In**.



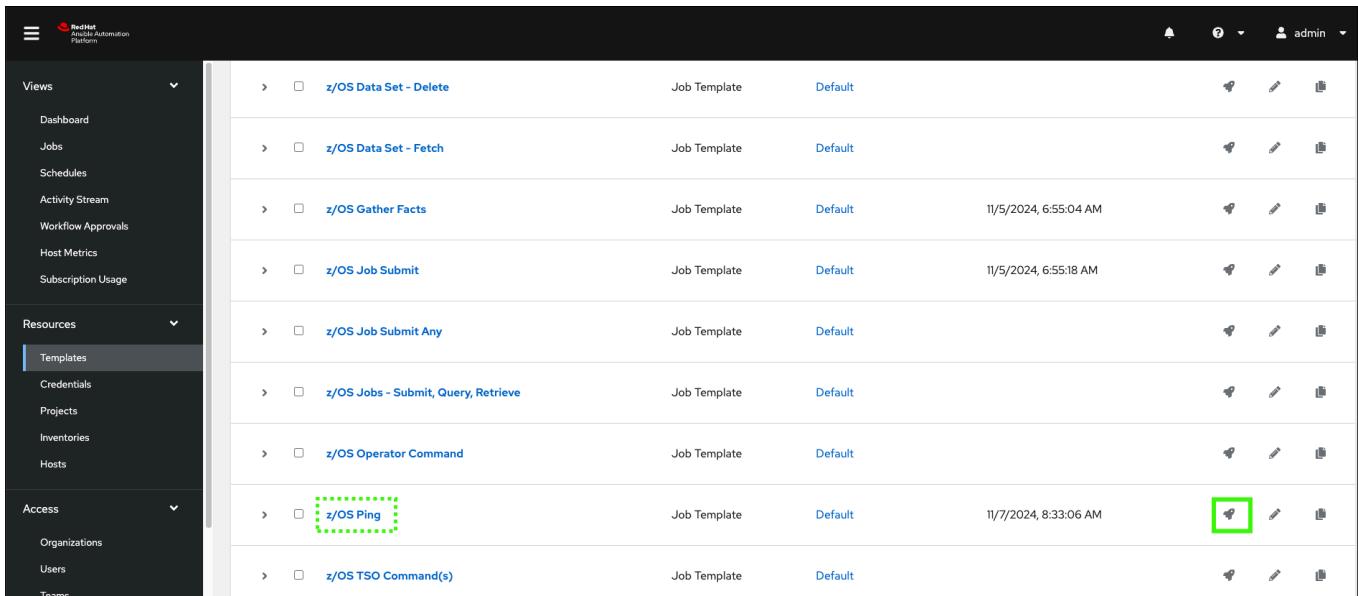
6. Click **Templates** under the **Resources** section.



The AAP instance is preconfigured to the Wazi aaS instance

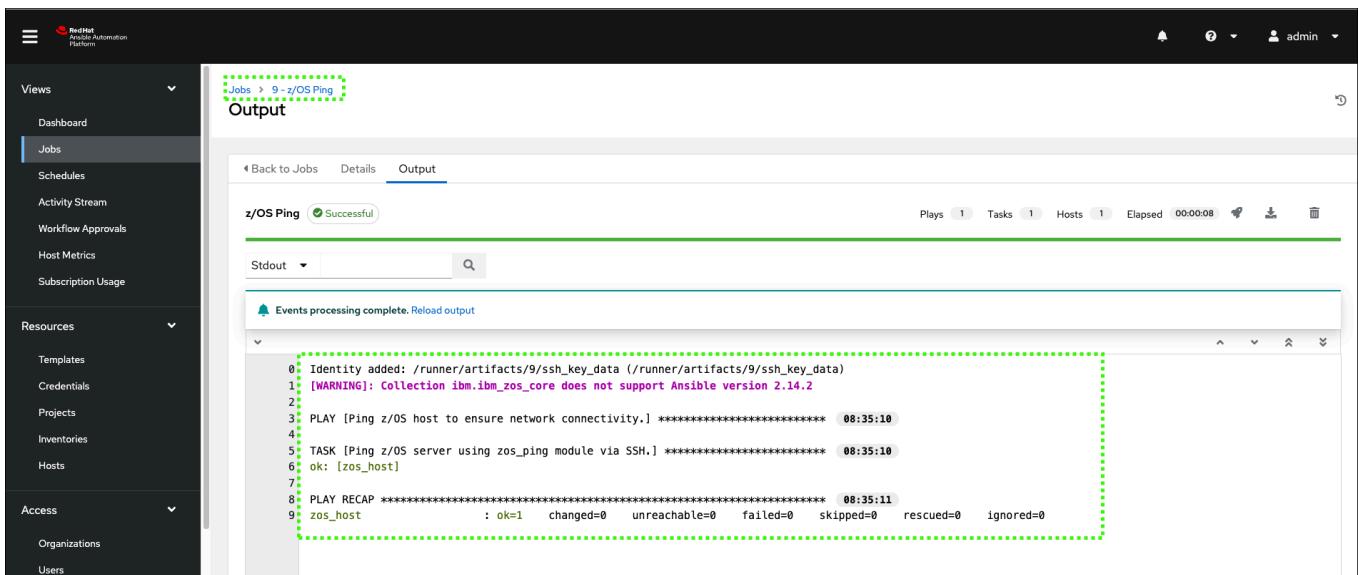
Note that because the AAP instance and the back-end z/OS system are preconfigured, no changes are needed to execute the templates and they will target your provisioned z/OS system by default.

7. Locate the **z/OS Ping** template and click the rocket (🚀) icon to start the template.



Views	z/OS Data Set - Delete	Job Template	Default			
Dashboard	z/OS Data Set - Fetch	Job Template	Default			
Schedules	z/OS Gather Facts	Job Template	Default	1/5/2024, 6:55:04 AM		
Activity Stream	z/OS Job Submit	Job Template	Default	1/5/2024, 6:55:18 AM		
Workflow Approvals	z/OS Job Submit Any	Job Template	Default			
Host Metrics	z/OS Jobs - Submit, Query, Retrieve	Job Template	Default			
Subscription Usage	z/OS Operator Command	Job Template	Default			
Resources	z/OS Ping	Job Template	Default	1/7/2024, 8:33:06 AM		
Access	z/OS TSO Command(s)	Job Template	Default			

8. Observe the z/OS Ping job run.



The screenshot shows the 'Jobs' section of the Red Hat Ansible Automation Platform. A specific job named 'z/OS Ping' is selected, indicated by a green dashed box around its name. The job status is listed as 'Successful'. The 'Output' tab is active, showing the command-line logs of the job execution. The logs indicate a successful ping operation to a host named 'zos_host'.

```

0 Identity added: /runner/artifacts/9/ssh_key_data (/runner/artifacts/9/ssh_key_data)
1 [WARNING]: Collection ibm.ibm_zos_core does not support Ansible version 2.14.2
2
3 PLAY [Ping z/OS host to ensure network connectivity.] **** 08:35:10
4
5 TASK [Ping z/OS server using zos_ping module via SSH.] **** 08:35:10
6 ok: [zos_host]
7
8 PLAY RECAP **** 08:35:11
9 zos_host : ok=1    changed=0    unreachable=0    failed=0    skipped=0    rescued=0    ignored=0

```

Take time to explore the other templates that are ready to use. Learn more about the automation capabilities [here](#).

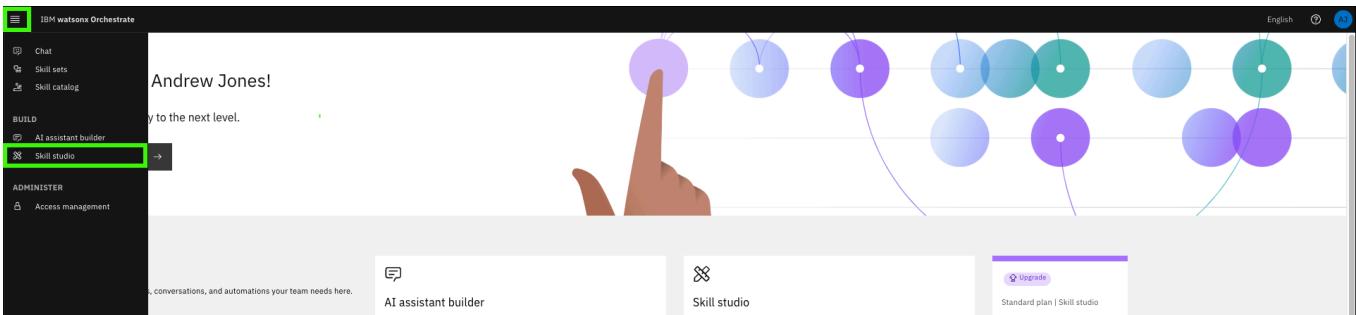
Importing skills from Ansible Automation Platform

Now that you understand Ansible Automation Platform (AAP) and the preinstalled automations available, you can import them as skills into your watsonx Orchestrate instance, which is used for assistant guided actions.

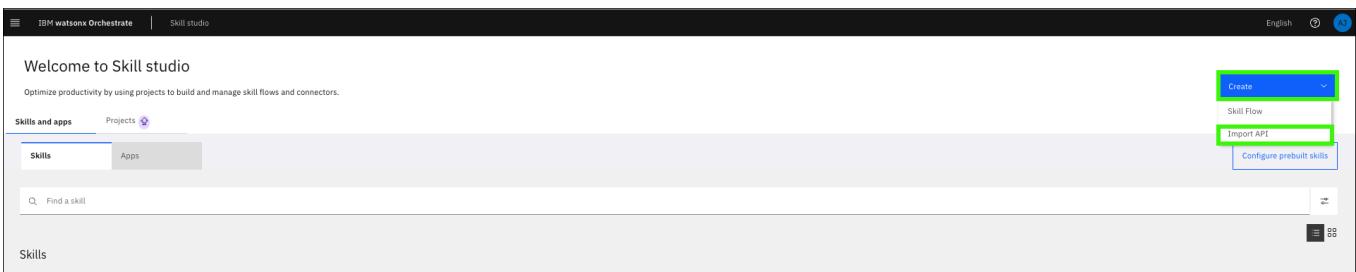
Import skills into your assistant

The next steps assume that you have an active browser window to the watsonx Orchestrate ITZ cloud account. If you do not, refer to the initial steps in [Creating an assistant and configuring conversational search](#).

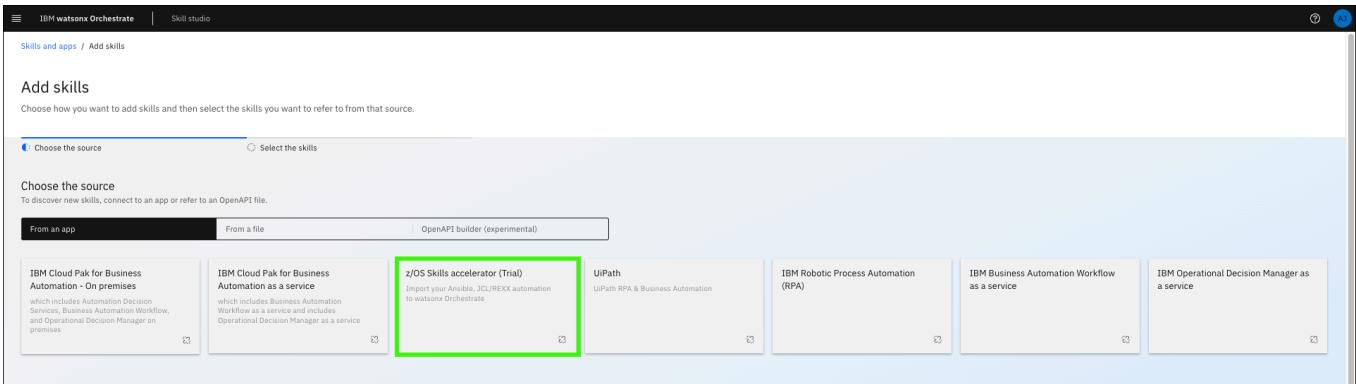
1. Return to your watsonx Orchestrate instance and expand the main menu and click **Skill studio**.



2. Expand **Create** and click **Import API**.



3. Click the **z/OS Skills accelerator (Trial)** tile.



4. Enter the following values in the **z/OS Skills accelerator** form and then click **Connect**.

Use the **URL**, **User Name**, and **Password** values recorded in the [Explore Ansible Automation Platform](#) section earlier.

a: Connection Type: ansible

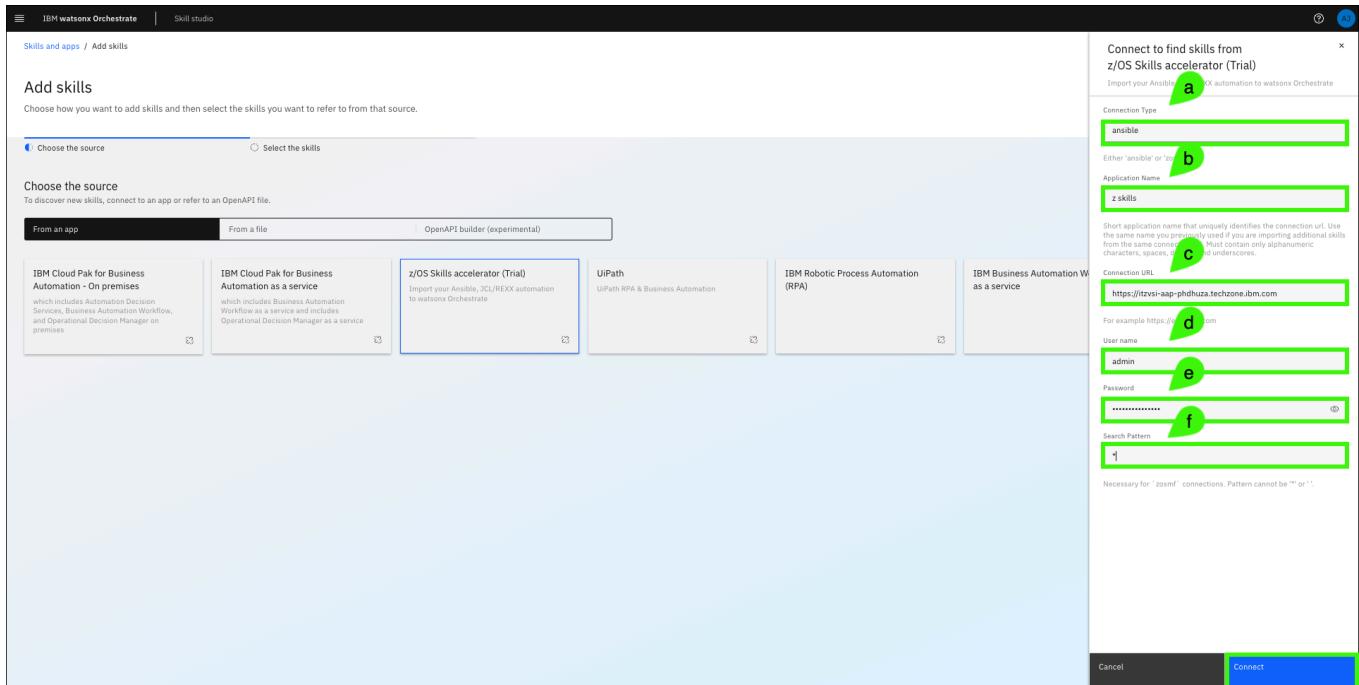
b: Application Name: <enter a meaningful name for the skills that you will import> - *be sure to remember this name, you will need in the next section*

c: Connection URL: <enter the URL for your AAP UI>

d: User Name: <enter the AAP User Name (for UI access)>

e: Password: <enter the AAP User Password>

f: Search Pattern: *

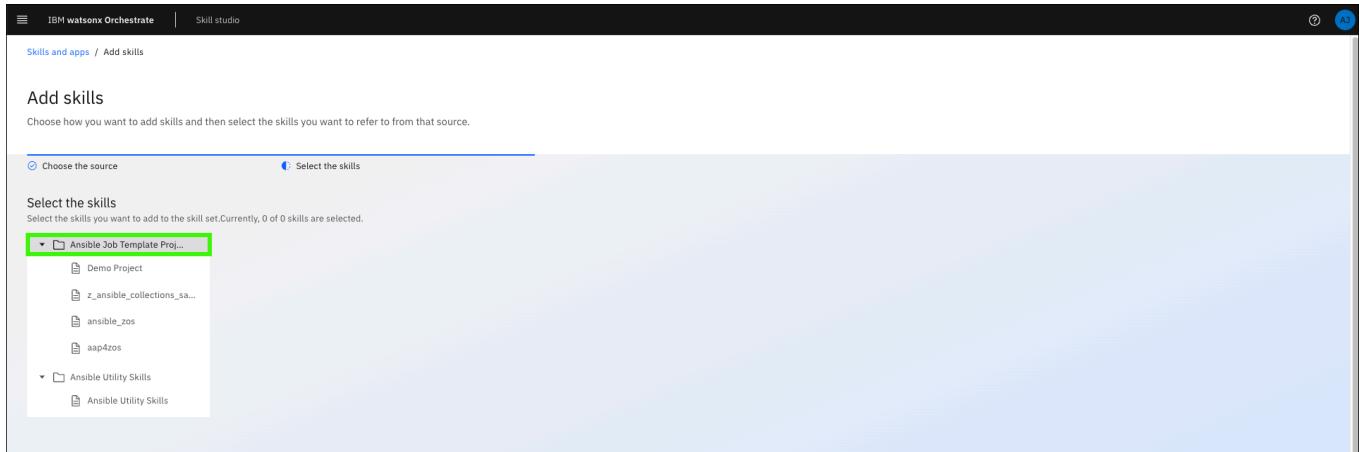


5. Expand the Ansible Job Template Proj... folder.



Explore the other available skills

Take time to explore the available skills. There are many utility skills provided out of the box with the "Z Skills Accelerator" which are needed for actions such as retrieving the output of an Ansible skill. Consider importing these utility skills to enable more complete automation execution flows.



6. Click **aap4zos**.

Select the skills
Select the skills you want to add to the skill set. Currently, 0 of 19 skills are selected.

Skill	Description	Status
Z/os ping	Z skills - this playbook pings...	Ready to add
Z/os gather facts	Z skills - this sample playbook...	Ready to add
Z/os job submit	Z skills - this playbook shows...	Ready to add
Z/os job submit any	Z skills - a playbook for subm...	Ready to add
Z/os jobs - submit, query, ret...	Z skills - this sample playbook...	Ready to add

7. Select the skills you want to import into your application and then click **Save as draft**.

For this lab, select the **Z/os ping** and **Z/os gather facts** skills.

Select the skills
Select the skills you want to add to the skill set. Currently, 2 of 19 skills are selected.

Skill	Description	Status
<input checked="" type="checkbox"/> Z/os ping	Z skills - this playbook pings...	Ready to add
<input checked="" type="checkbox"/> Z/os gather facts	Z skills - this sample playbook...	Ready to add
<input type="checkbox"/> Z/os job submit	Z skills - this playbook shows...	Ready to add
<input type="checkbox"/> Z/os job submit any	Z skills - a playbook for subm...	Ready to add
<input type="checkbox"/> Z/os users - add	Z skills - this playbook shows...	Ready to add
<input type="checkbox"/> Z/os data set - basics	Z skills - this sample playbook...	Ready to add
<input type="checkbox"/> Z/os data set - create	Z skills - this playbook creat...	Ready to add
<input type="checkbox"/> Z/os data set - delete	Z skills - this playbook delet...	Ready to add
<input type="checkbox"/> Z/os data set - fetch	Z skills - this playbook fetch...	Ready to add
<input type="checkbox"/> Z/os certs - health checker se...	Z skills - this playbook enabl...	Ready to add
<input type="checkbox"/> Z/os certs - create keyring	Z skills - this playbook delet...	Ready to add
<input type="checkbox"/> Z/os certs - delete keyring	Z skills - this playbook delet...	Ready to add
<input type="checkbox"/> Z/os certs - create cert	Z skills - this playbook creat...	Ready to add
<input type="checkbox"/> Z/os certs - delete cert	Z skills - this playbook delet...	Ready to add

8. Click the ellipses (⋮) for the first skill and select **Enhance this skill**.

Welcome to Skill studio

Optimize productivity by using projects to build and manage skill flows and connectors.

Skills and apps Projects

Skills Apps

Find a skill

Skills

Name	Step in the process	Status	Skill type	Author	Last edited
z/OS Gather Facts	Just 1 step away to be ready	Ready to publish	Imported	andrew@jones-tx.com	November 19 2024
z/OS Ping	Just 1 step away to be ready	Ready to publish	Imported	andrew@jones-tx.com	November 19 2024

Configure prebuilt skills

9. Review the skill enhancement options and then click **Publish**.

On the **Enhance this skill** page, you can specify enhancements to the default skill. Refer to this documentation for more information on enhancing skills.

Skills and apps / Enhance this skill

Enhance the "z/OS Gather Facts" skill

Add details that will make people want to use this skill.

Name Input Output Security Phrases Next best skills

Name and describe this skill in a way that tells users how it's used and why they would want to use it.

Name* z/OS Gather Facts

Description 0/100
z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls z/OS-specific information from the z/OS host.

Categories

App

Ansible Controller Skills - z skills

Preview

The skill will look like this in the catalog.

z/OS Gather Facts
z skills - This sample playbook demonstrates the z/OS gather facts...

The skill will look like this in the skill set.

z/OS Gather Facts

Cancel Publish Save as draft

10. Repeat steps 8 and 9 for each skill you imported.

Welcome to Skill studio

Optimize productivity by using projects to build and manage skill flows and connectors.

Skills and apps Projects

Skills Apps

Find a skill

Skills

Name	Step in the process	Status	Skill type	Author	Last edited
z/OS Gather Facts	Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
z/OS Ping	Just 1 step away to be ready	Ready to publish	Imported	andrew@jones-tx.com	November 19 2024

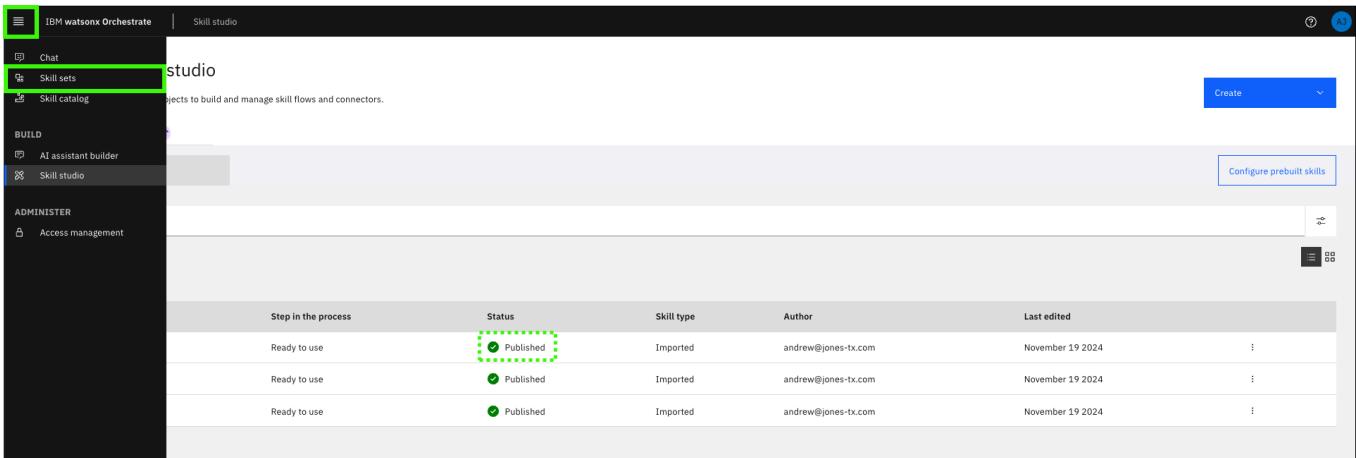
Configure prebuilt skills

The selected skills are now ready for use and available to your assistant. In the next section, learn how to connect them to your assistant.

Connecting skills to your assistant

Once you have a subset of skills published, the application you created can be connected to your assistant.

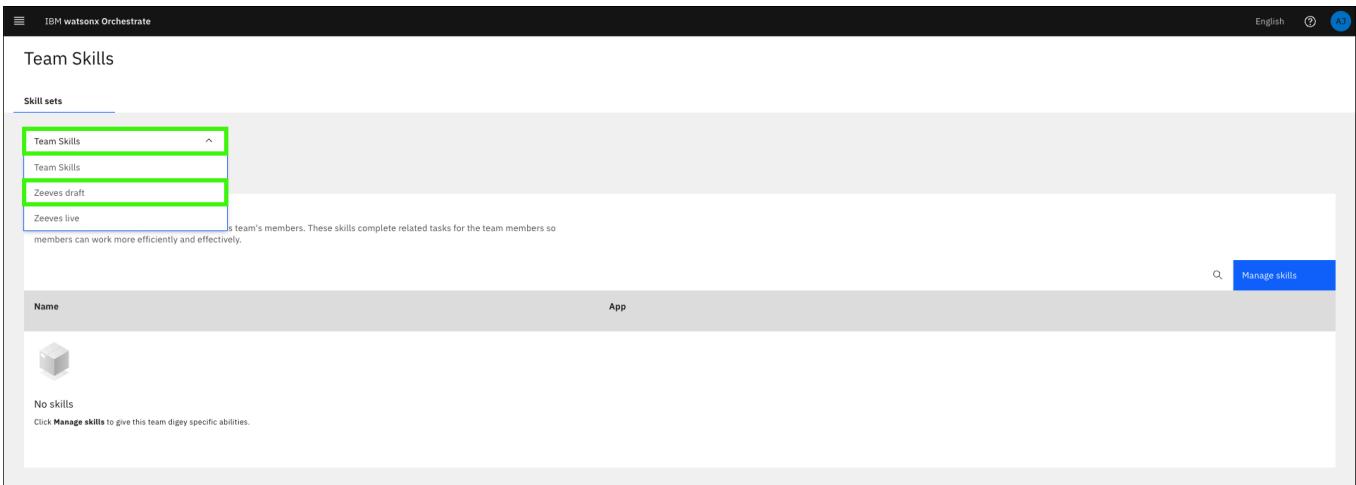
1. Expand the main menu and select **Skill sets**.



The screenshot shows the IBM Watsonx Orchestrate interface with the 'Skill studio' tab selected. The left sidebar has 'Skill sets' highlighted with a green box. The main area displays a table of published skills:

Step in the process	Status	Skill type	Author	Last edited
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024

2. Click the **Team Skills** drop-down and select the **Draft** of your assistant.

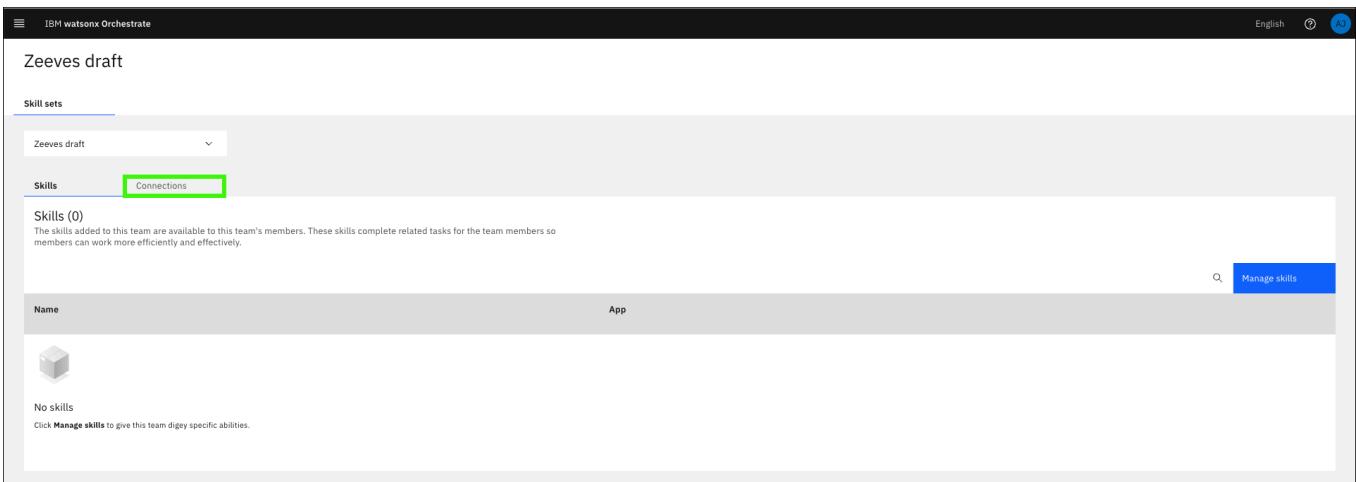


The screenshot shows the 'Team Skills' page. The 'Skill sets' dropdown is open, showing 'Team Skills' and 'Zeeves draft' (which is highlighted with a green box). Below the dropdown, a note says: 'The skills added to this team are available to this team's members. These skills complete related tasks for the team members so members can work more efficiently and effectively.' The main area shows a table with one row:

Name	App

Below the table, it says 'No skills' and 'Click **Manage skills** to give this team digest specific abilities.'

3. Click the **Connections** tab.



The screenshot shows the 'Zeeves draft' connections page. The 'Skills' tab is selected (highlighted with a green box), and the 'Connections' tab is also present. A note above the table says: 'The skills added to this team are available to this team's members. These skills complete related tasks for the team members so members can work more efficiently and effectively.' The main area shows a table with one row:

Name	App

Below the table, it says 'No skills' and 'Click **Manage skills** to give this team digest specific abilities.'

4. Click the **Search (🔍)** icon.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Activate or deactivate attracting candidates using ThisWay Global	4	⚠️ Not specified	-	⋮
Adobe Workfront	37	⚠️ Not specified	-	⋮
Alliance Virtual Office	2	⚠️ Not specified	-	⋮
Amazon S3	8	⚠️ Not specified	-	⋮
Amazon SES	10	⚠️ Not specified	-	⋮

Items per page: 5 | 1-5 of 78 items | 1 ⚏ of 16 pages | < >

5. Search for the application name you specified in the previous section.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Ansible Controller Skills - z skills	2	⚠️ Not specified	-	⋮

Items per page: 5 | 1-1 of 1 items | 1 ⚏ of 1 page | < >

6. Click the ellipses (⋮) and click **Connect app**.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Ansible Controller Skills - z skills	2	⚠️ Not specified	-	⋮

Items per page: 5 | 1-1 of 1 items | Connect app | 1 ⚏ of 1 page | < >

7. On the **Connect to Ansible Controller Skills** form, keep the defaults and click **Connect app**.

8. Enter the **username (a)** and **password (b)** using the username (`admin`) and password for your IBM Technology Zone (ITZ) `watsonx Assistant for Z Pilot - AAP & z/OS` reservation, and then click **Connect app (c)**.

The application is now connected to the draft version of your assistant.

Continue to the next section to create actions for your assistant.

Creating actions for your assistant

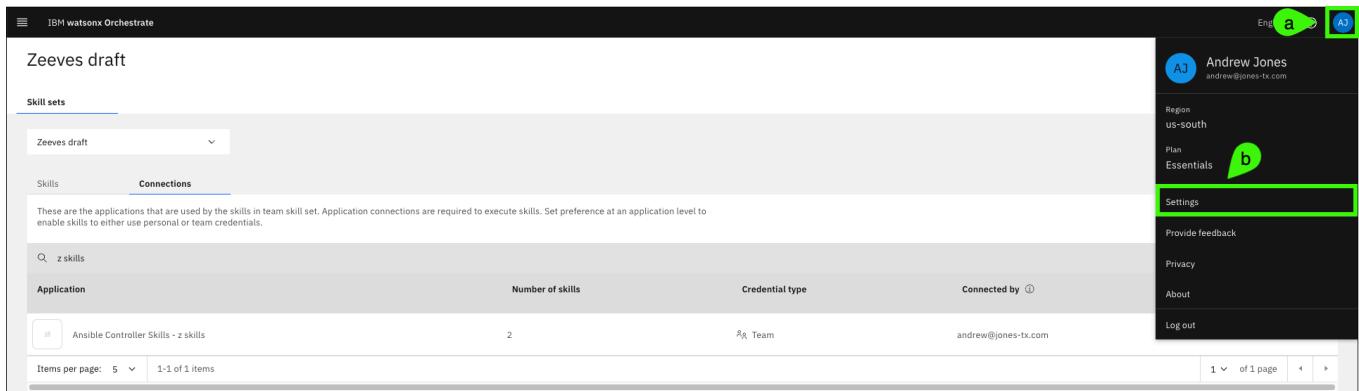
Once the skills in your application are connected to your assistant, you're ready to begin creating actions tied to those skills. Learn more about building actions [here](#)

Configure the number of input fields

Before configuring actions, it's important to modify a setting within watsonx Orchestrate that allows triggered skills to display as forms (versus conversational skills).

1. Click your (a) profile icon and then click (b) **Settings**

Learn more about configuring input fields [here](#).



The screenshot shows the IBM Watsonx Orchestrate web interface. At the top right, there is a user profile icon (a green circle with 'AJ') and a gear icon. A green callout bubble labeled 'a' points to the user profile icon. Another green callout bubble labeled 'b' points to the 'Settings' link in the sidebar menu. The main left panel shows a 'Skill sets' section with a dropdown menu set to 'Zeeves draft'. Below it, there are tabs for 'Skills' and 'Connections'. The 'Skills' tab is active, showing a table with one row: 'Ansible Controller Skills - z skills' (Number of skills: 2, Credential type: Team, Connected by: andrew@jones-tx.com). The 'Connections' tab is also visible. The right sidebar contains user information (Andrew Jones, andrew@jones-tx.com), region (US-SOUTH), plan (Essentials), and links for 'Settings', 'Provide feedback', 'Privacy', 'About', and 'Log out'. At the bottom, there are pagination controls.

2. Click the **Skill configurations** tab.



The screenshot shows the 'Settings' page in the IBM Watsonx Orchestrate interface. The top navigation bar has tabs for 'Data Retention', 'Skill configurations' (which is highlighted with a green border), and 'Platform languages'. The main content area is titled 'Data Retention Policy' and contains a section for 'Active' retention. It includes a note: 'The chat history for the users in the tenant are saved for 30 days. After 30 days, the chat history is deleted permanently. Deleting the chat history doesn't affect the connected apps or the added skills.' There are also '1 of 1 page' and navigation arrows at the bottom.

3. Enter **0** for the **Number of form fields**.



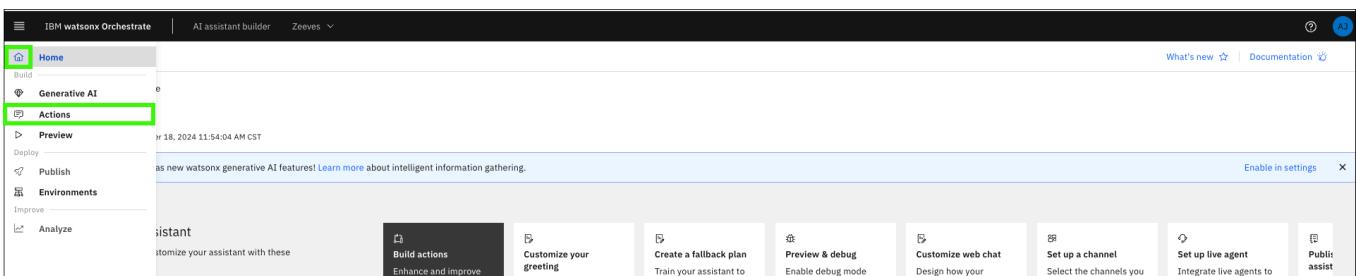
The screenshot shows the 'Settings' page again, but this time the 'Skill configurations' tab is active. In the 'Skill configurations' section, there is a note: 'Set default for maximum number of fields to consider a skill to be conversational'. Below it is an input field labeled 'Number of form fields' with the value '0'. To the right of the input field are minus and plus buttons. The rest of the page is mostly empty space.

Create actions

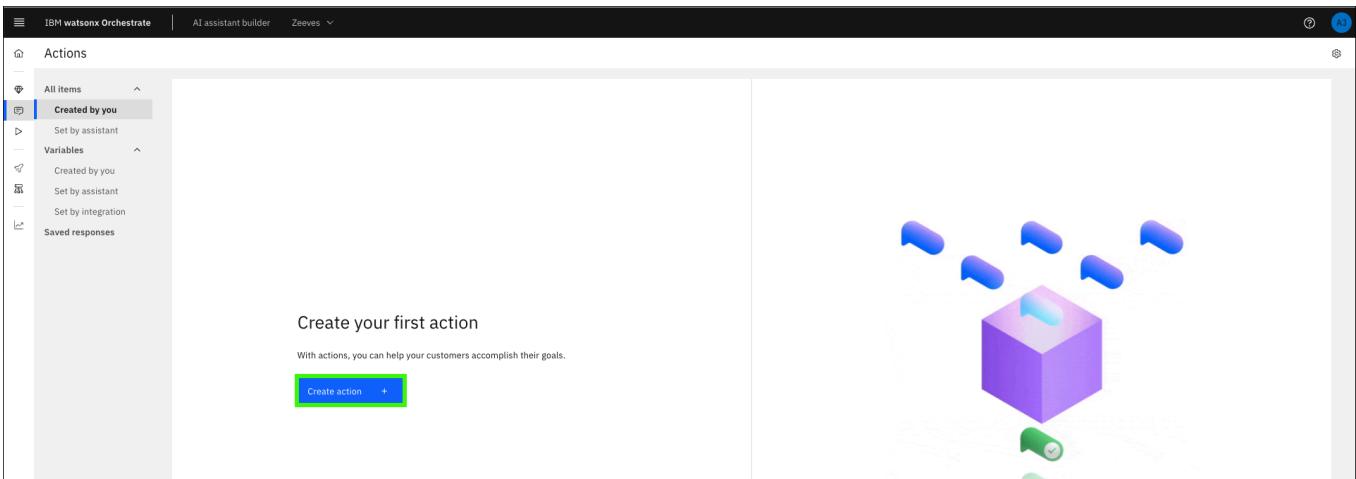
1. Click the main menu and select **AI assistant builder**.



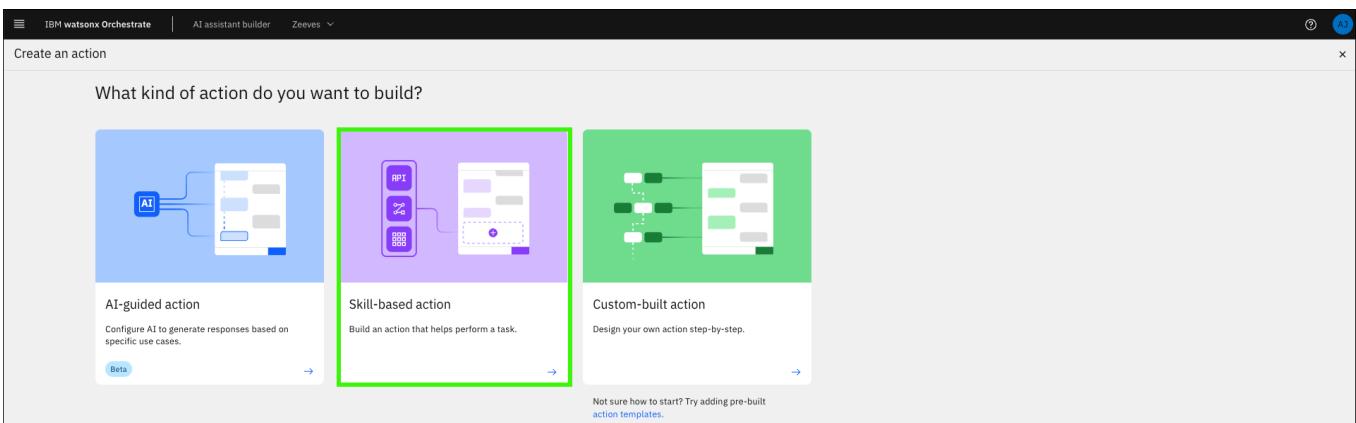
2. Hover over the **Home** icon (🏠) and click **Actions**.



3. Click **Create action**.



4. Click the **Skill-based action** tile.



5. Select the **z/OS Gather Facts** tile and click **Next**.

Note, it may take a minute for the page to display the action tiles. The date shown in the **z/OS Gather Facts** tile reflects when you added the skill to your application.

Build an action from a skill

Select a skill

Choose a conversational skill published as a foundation of your action.

Search a skill

z/OS Ping z skills - This playbook pings the z/OS host to test connectivity. Last updated: 2024-11-19T15:58:20.567Z	z/OS Gather Facts z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls z/OS-specific information from the z/OS host. Last updated: 2024-11-19T15:56:26.843Z	Summarize the Webex meeting transcript in watsonx.ai Last updated: 2024-11-04T10:49:16.502Z	Summarize the Box content in watsonx.ai Last updated: 2024-11-04T10:49:12.077Z	Summarize a Zendesk ticket in watsonx.ai Last updated: 2024-11-04T10:49:09.476Z
Summarize a ServiceNow incident in watsonx.ai Last updated: 2024-11-04T10:49:05.828Z	Summarize a Salesforce opportunity in watsonx.ai Last updated: 2024-11-04T10:49:01.769Z	Sharepoint document summary in watsonx.ai Last updated: 2024-11-04T10:48:55.707Z	Salesloft email summary in watsonx.ai Last updated: 2024-11-04T10:48:51.522Z	Salesforce case summarization in watsonx.ai Last updated: 2024-11-04T10:48:48.195Z
Salesforce case sentiment analyze	Outlook email summary	Github issue summarization	Github issue sentiment	Generate an email

Cancel Next

- On the **New action** dialog, (a) enter a prompt a user of the assistant might use to initiate the action and then (b) click **Save**.

Be careful with the sample phrases you specify.

During the development of the lab guide, it was discovered that some sample phrases with a `/` character can cause issues with the actions. Avoid using **z/OS** in the your sample phrases. This issue has been reported to the offering team.

Sample prompts:

Get zOS facts

Gather zOS facts

Customer starts with:
Example: I want to pay my credit card bill.

Add example phrases:

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: 0

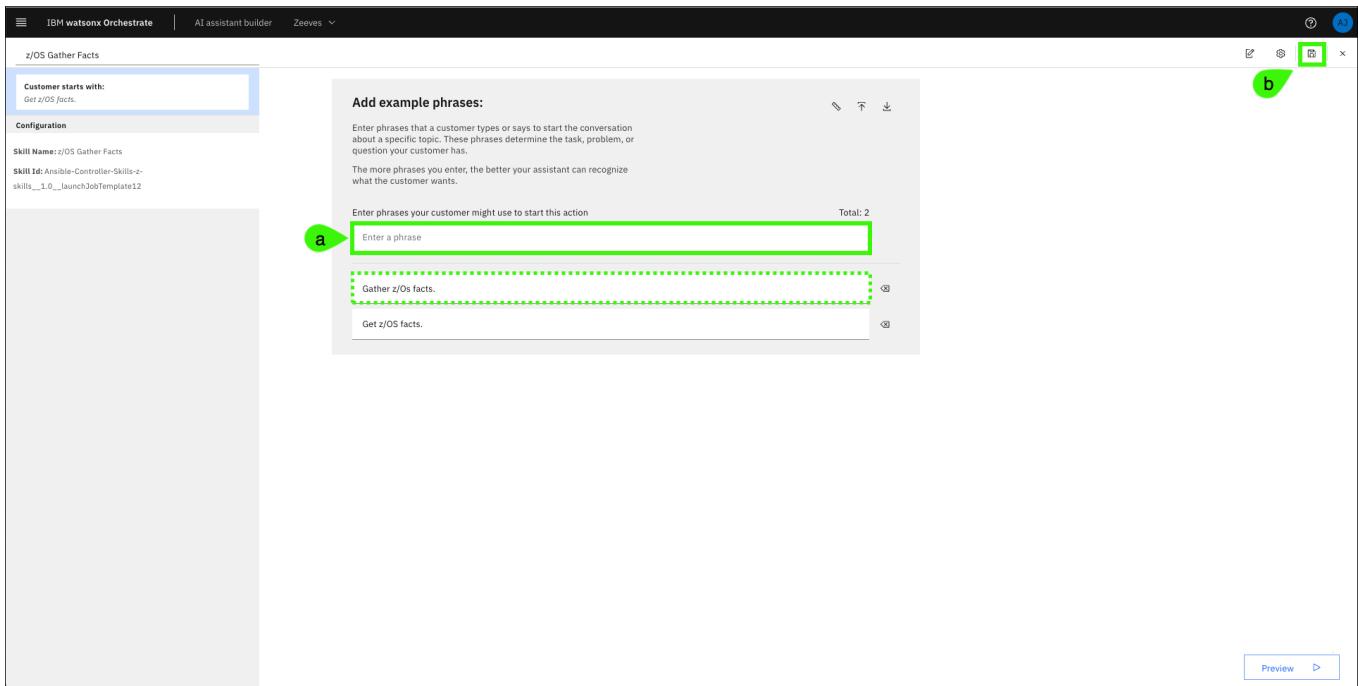
Example: I want to pay my credit card bill.

New action

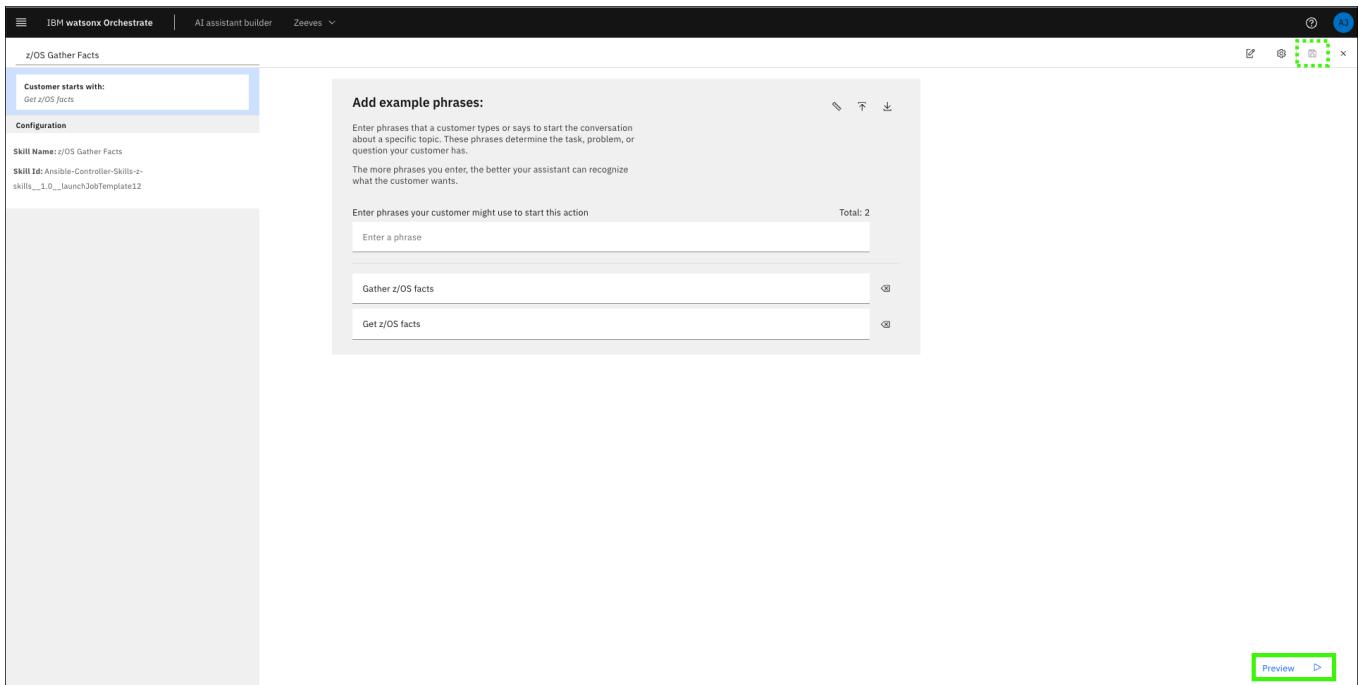
What does your customer say to start this interaction?
Get z/OS facts.

Cancel Save

- Add any (a) additional prompts and then (b) click the save ().



8. Click Preview.



9. Enter one of the prompts you specified in step 9 or 10.

Prompt:

Get zOS facts

Customer starts with:
Get z/OS facts

Add example phrases:

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: 2

Enter a phrase

Gather z/OS facts
Get z/OS facts

Preview

12:55 PM
Greet customer [default]
Welcome, how can I assist you?

Get z/OS facts

10. Review the returned results and record the **job** number.

In the execution of this skill-based action, the skill executed properly and the output is the job id.



If an error is generated, review the Troubleshooting section below.

Customer starts with:
Get z/OS facts

Add example phrases:

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: 2

Enter a phrase

Gather z/OS facts
Get z/OS facts

Preview

12:55 PM
Greet customer [default]
Welcome, how can I assist you?

You 1:04 PM
Conversational skill called
z/OS Gather Facts recognized
[Job ID: 12]
status: pending

There are no additional steps for this action. Add a new step or end the action.

Use the up arrow for prior messages

Verify the job in the Ansible Automation Platform console

Return to the Ansible Automation Platform (AAP) console and review the job information.

1. Click **Jobs** and then click the **job** number recorded in the previous step for the **z/OS Gather Facts** skill.

The screenshot shows the 'Jobs' page in the Red Hat Ansible Automation Platform. The left sidebar has a 'Jobs' menu item highlighted with a green box. In the main table, a row for '12 - z/OS Gather Facts' is highlighted with a green box. The table columns include Name, Status, Type, Start Time, Finish Time, and Actions.

Name	Status	Type	Start Time	Finish Time	Actions
12 - z/OS Gather Facts	Successful	Playbook Run	12/5/2024, 7:17:32 AM	12/5/2024, 7:17:41 AM	

2. Review both the **Details** and **Output** for the **z/OS Gather Facts** job.

Recall, that in the assistant, the contents shown in the **Output** of the Ansible job were not displayed.

The screenshot shows the 'Output' tab for job '12 - z/OS Gather Facts'. The output content is a playbook run log with syntax highlighting for Ansible tasks. A large green dotted rectangle highlights the entire output content area.

```

25 }
26
27 TASK [Print out all gathered facts about the z/OS host.] **** 07:17:38
28 ok: [zos_host] => {
29     "ansible_facts": {
30         "arch_level": "2",
31         "cpc_nd_manufacturer": "IBM",
32         "cpc_nd_model": "A00",
33         "cpc_nd_plant": "C1",
34         "cpc_nd_seqno": "237701828347",
35         "cpc_nd_type": "008562",
36         "edt": "00",
37         "hw_name": "...",
38         "ieasym_card": "(00,K2)",
39         "io_config_id": "00",
40         "iodate": "...",
41         "iodesc": "...",
42         "iodf_config": "DEFAULT",
43         "iodf_name": "PROV.IODF00",
44         "iodf_unit_addr": "DE28",
45         "ioproc": "...",
46         "iotime": "..."
}

```

IBM watsonx Assistant for Z provides utility skills to retrieve the job output. It is also possible to create a skill flow that executes the **z/OS Gather Facts** skill followed by the **Retrieve job output** utility skill in sequence; passing the job id from the first skill to the second, in order to view the output within the assistant. Creating a skill flow is covered in the next section.

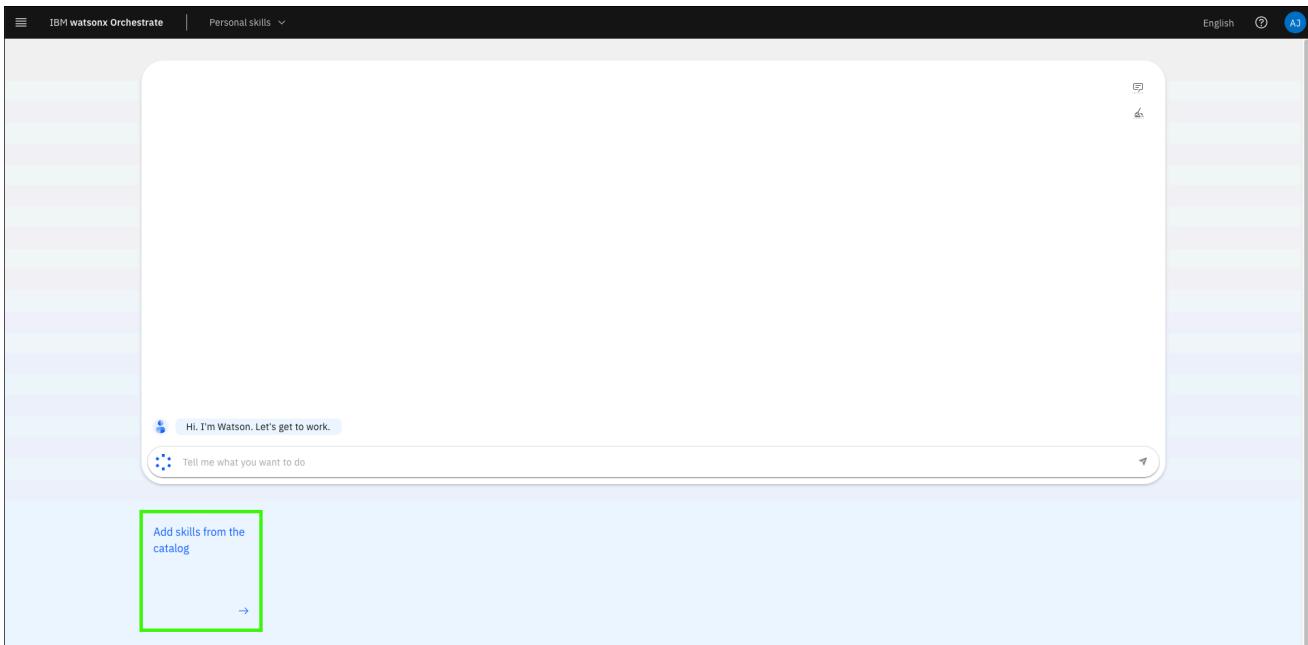
Troubleshooting

Skill returns "Sorry, we're having issues generating a response".

This error appears to be an intermittent issue when a skill is first added. To resolve, add the skill to your personal skills catalog using the steps that follow. If you encounter the issue, try the steps that follow:

1. Expand the main menu and select Chat.

2. Click Add skills from the catalog.



3. Search for the skill app you created earlier and click the tile for your app.

The screenshot shows the 'Skill catalog' page. The search bar at the top contains the text "z skills". Below the search bar, there's a grid of app tiles. One specific tile, "Ansible Controller Skills - z skills", is highlighted with a green box. Other visible tiles include Saleslift, Cognos, Skill flows, Adobe Workfront, Webex, IBM Process Mining, Salesforce Chatter, Interview top candidates using ..., Reveal your existing applicants..., Seismic, FreshService, Workday HCM, and ZoomInfo.

4. Click Add skill for all the skills you want to add.

The screenshot shows the details for the "Ansible Controller Skills - z skills" app. It lists two skills: "z/OS Gather Facts" and "z/OS Ping". Each skill card has an "Add skill +" button, which is highlighted with a green box. There are also "Connect app" and "Edit" buttons at the top right of the page.

5. Click Connect app.

Ansible Controller Skills - z skills (2)

z/OS Gather Facts
z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls z/OS...
z/OS Ping
z skills - This playbook pings the z/OS host to test connectivity.

Connect app

6. Enter the (a) **username** and (b) **password** using the username (admin) and password for your IBM Technology Zone (ITZ) watsonx Assistant for Z Pilot - AAP & z/OS reservation (AAP User Password (Use SSH key to login, only use password for UI)), and then click **Connect app**.

Connect to Ansible Controller Skills - z skills

username: admin
password: *****

Cancel Connect app

7. Expand the main menu and select **Chat**.

IBM Watsonx Orchestrate

Chat

Skills - z skills

z/OS Ping
z skills - This playbook pings the z/OS host to test connectivity.

Connected

8. Try one of the prompts you created for your skill.

Prompt:

Gather zOS facts

The screenshot shows the IBM Watsonx Assistant interface. At the top, it says "IBM Watsonx Orchestrate" and "Personal skills". On the right, there are language settings for "English" and a blue "AJ" button. The main area has a message from Watson: "Hi, I'm Watson. Check out the skills in the catalog to see how I can help you." Below this, a green box highlights a skill card for "Gather z/OS facts". The card shows the results of the skill: "z/OS Gather Facts" with a status of "pending" and a progress bar at 12%. To the left, a blue box says "Add skills from the catalog" with an arrow pointing to a "Ansible Controller Skills - z skills" catalog entry, which has a "2 skills" badge.

You should now be able to run the skill through the assistant preview.

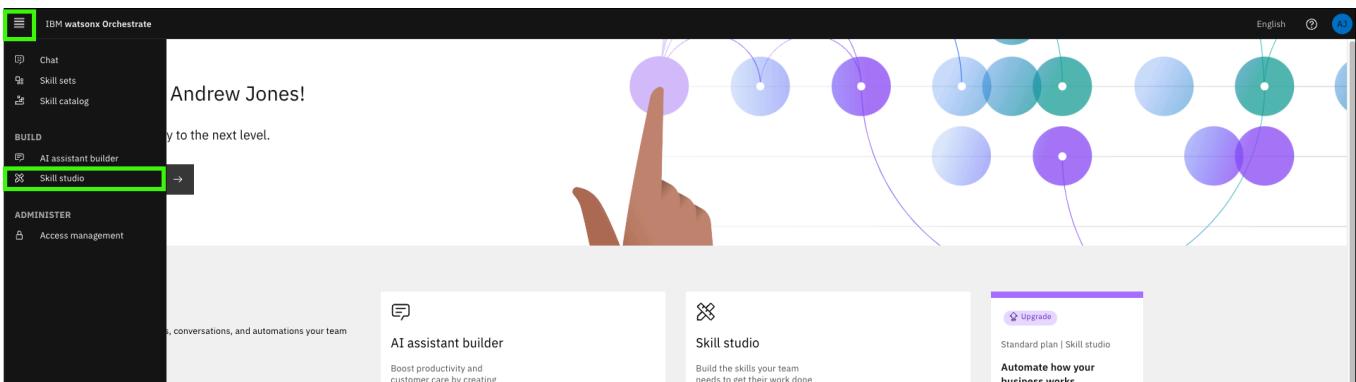
Creating skill flows

As seen in the previous section, running the Ansible skill to **Gather z/OS facts**, the skill executed successfully and was verified within the Ansible Automation Platform (AAP) console by viewing the job output. However, the output wasn't displayed by the assistant. To enable this scenario, a skill flow is needed. Skills are often more valuable when combined with other skills. You can create a skill flow to use two or more skills together to finish a task (like returning the output of a previous skill). When you create a skill flow, you map the output of one skill as the input for subsequent skills. Learn more about creating skill flows [here](#).

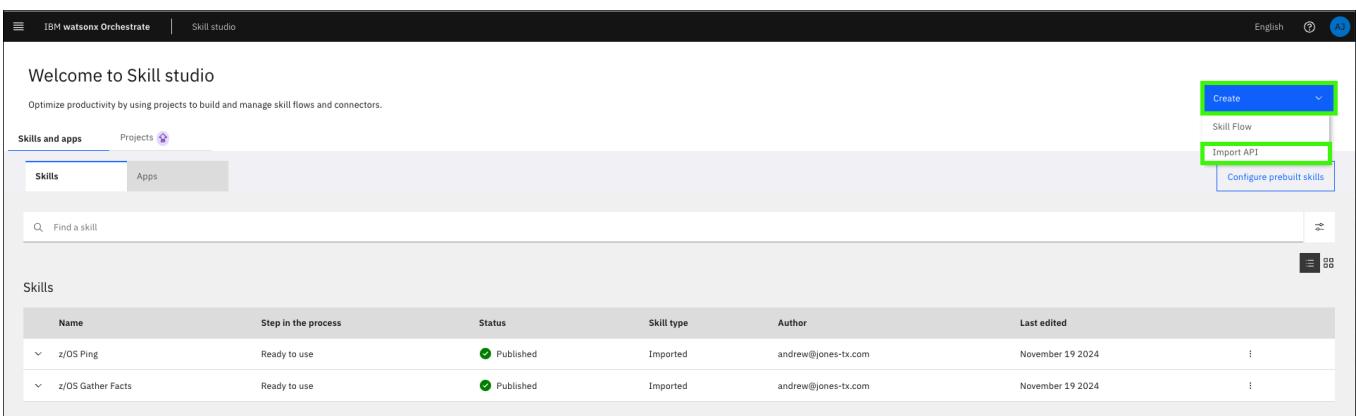
As mentioned in a previous section, there are some default utility skills that are provided out of the box with the "Z Skills Accelerator" which are leveraged to return the output of a skill. To accomplish this, we will import the Ansible Utility skill called **Retrieve job output**.

Add the utility skill

1. Open IBM watsonx Orchestrate **Skill studio**.



2. Expand **Create** and click **Import API**.



3. Click the **z/OS Skills accelerator (Trial)** tile.

The screenshot shows the 'Add skills' interface in IBM Watsonx Orchestrate. At the top, there are two tabs: 'Choose the source' (selected) and 'Select the skills'. Below this, a section titled 'Choose the source' with the sub-instruction 'To discover new skills, connect to an app or refer to an OpenAPI file.' contains three buttons: 'From an app' (selected), 'From a file', and 'OpenAPI builder (experimental)'. A list of skill sources is shown below, with the 'z/OS Skills accelerator (Trial)' entry highlighted by a green box. Other entries include 'IBM Cloud Pak for Business Automation - On premises', 'IBM Cloud Pak for Business Automation as a service', 'UiPath', 'IBM Robotic Process Automation (RPA)', and 'IBM Business Automation Workflow as a service'. Each entry has a small circular icon with a question mark next to it.

4. Enter the following values in the **z/OS Skills accelerator** form and then click **Connect**.

Use the **URL**, **User Name**, and **Password** values recorded in the **Explore Ansible Automation Platform** section earlier.

a: Connection Type: `ansible`

b: Application Name: <use the same application name as in previous section>

c: Connection URL: <enter the URL for your AAP UI>

d: User Name: <enter the AAP User Name (for UI access)>

e: Password: <enter the AAP User Password>

f: Search Pattern: `*`

This screenshot shows the configuration dialog for the 'z/OS Skills accelerator (Trial)' connection. The right side of the screen displays a sidebar with instructions and field descriptions. The fields are labeled as follows:

- a:** Connection Type: `ansible`
- b:** Application Name: `z skills`
- c:** Connection URL: `https://itzvi-aap-phdhuzza.techzone.ibm.com`
- d:** User name: `admin`
- e:** Password: `*****`
- f:** Search Pattern: `*`

The 'Cancel' and 'Connect' buttons are at the bottom right of the dialog.

5. Expand **Ansible Utility Skills** and click **Ansible Utility Skills**.

6. Select **Retrieve job output** and click **Save as draft**.

7. Click the ellipses (...) for the **Retrieve job output** skill and select **Enhance this skill**.

8. Review the skill settings and then click **Publish**.

Name: Retrieve job output
Input: 0/100
Output: 0/100
Security: None
Phrases: None
Next best skills: None
API version: 1.0

Preview

The skill will look like this in the catalog.

Retrieve job output
z skills - Retrieve job output by job Id

The skill will look like this in the skill set.

Retrieve job output

Cancel **Publish** **Save as draft**

9. Select Skill sets from the main menu.

Step in the process	Status	Skill type	Author	Last edited
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024

10. Select (a) your draft assistant in the Team Skills drop-down list and (b) click the Connections tab.

Application	Number of skills	Credential type	Connected by	Action
Activate or deactivate attracting candidates using ThisWay Global	4	Not specified	-	⋮
Adobe Workfront	37	Not specified	-	⋮
Alliance Virtual Office	2	Not specified	-	⋮
Amazon S3	8	Not specified	-	⋮
Amazon SES	10	Not specified	-	⋮

Items per page: 5 | 1-5 of 78 items

11. Click the **Search (🔍)** icon.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Activate or deactivate attracting candidates using ThisWay Global	4	⚠️ Not specified	-	⋮
Adobe Workfront	37	⚠️ Not specified	-	⋮
Alliance Virtual Office	2	⚠️ Not specified	-	⋮
Amazon S3	8	⚠️ Not specified	-	⋮
Amazon SES	10	⚠️ Not specified	-	⋮

Items per page: 5 | 1-5 of 78 items | 1 ⚏ of 16 pages | ⌂ ⌃

12. Search for the application name you specified earlier.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Ansible Controller Skills - z skills	2	⚠️ Not specified	-	⋮

Items per page: 5 | 1-1 of 1 items | 1 ⚏ of 1 page | ⌂ ⌃

13. Click the (a) ellipses (⋮) for your application and (b) click **Edit connection**.

Application	Number of skills	Credential type	Connected by ⓘ	Action
Ansible Controller Skills - z skills	3	⚠️ Team	andrew@jones-tx.com	a ⌂ b ⌂ ⌋

Items per page: 5 | 1-1 of 1 items | 1 ⚏ of 1 page | ⌂ ⌃

14. Verify the application is **Connected (a)** and then click **Close (b)**.

The screenshot shows the 'Skill sets' section for the 'Zeeves draft' team. A table lists the skill 'Ansible Controller Skills - z skills' with 3 skills and 'Team' credential type. A callout 'a' points to the 'Connected' status, and another callout 'b' points to the 'Edit' button.

Add the skills to your Personal skills

1. Click **Skill catalog** in the main menu.

The screenshot shows the 'Skill catalog' section. A table lists the skill 'Ansible Controller Skills - z skills' with 3 skills and 'andrew@jones-tx.com' connected by Team. A callout 'a' points to the 'Connected by' column.

2. Search for the application name you specified earlier.

The screenshot shows the 'Skill catalog' search results for 'z skills'. It displays a grid of popular skills like 'Send an email from Gmail' and a grid of all apps like 'Coupa', 'ZoomInfo', 'HubSpot CRM', etc.

3. Click the tile for your application.

Note, the tile name is proceeded by **Ansible Controller Skills**.

Skill catalog
Skills are grouped by app. Select an app to see all the skills that use that app.

Personal skills

Q z skills X

Ansible Controller Skills - z ... 3 skills

Apps

- ZoomInfo 26 skills
- Workday HCM 36 skills
- FreshService 25 skills
- Seismic 22 skills
- Reveal your existing applic... 7 skills
- Interview top candidates u... 2 skills
- Salesforce Chatter 5 skills
- IBM Process Mining 2 skills
- Webex 14 skills
- Adobe Workfront 37 skills
- Skill flows 167 skills
- Cognos 8 skills
- Salessoft 47 skills
- Ansible Controller Skills - z ... 3 skills**

- Click **Add skill** for each of the skills you want to add to the flow.

Skill catalog / Ansible Controller Skills - z skills (3)

Personal skills

Q Search skills

Ansible Controller Skills - z skills

- Retrieve job output
z skills - Retrieve job output by job Id
- z/OS Gather Facts**
z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls...
- z/OS Ping**
z skills - This playbook pings the z/OS host to test connectivity.

Connect app ⚙

Create the skill flow

- Click **Skill studio** in the main menu.

IBM Watsonx Orchestrate

English ⚙

Chat

Skill sets

Skill catalog

BUILD

AI assistant builder

Skill studio

ADMINISTER

Access management

Skills - z skills (3)

z skills

z/OS Gather Facts
z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls...

z/OS Ping
z skills - This playbook pings the z/OS host to test connectivity.

Added ✓

Added ✓

Add skill +

Connect app ⚙

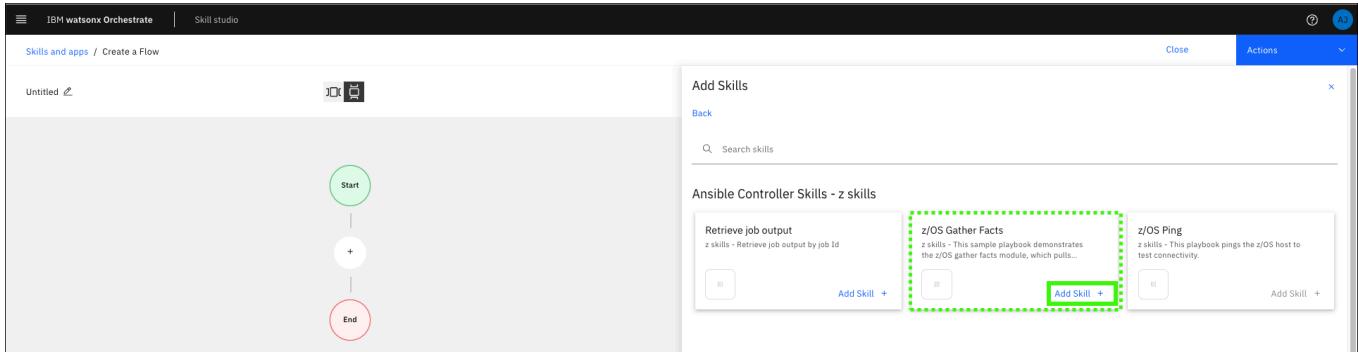
- Expand the **Create** drop-down menu and click on **Skill flow**.

3. Click the + icon.

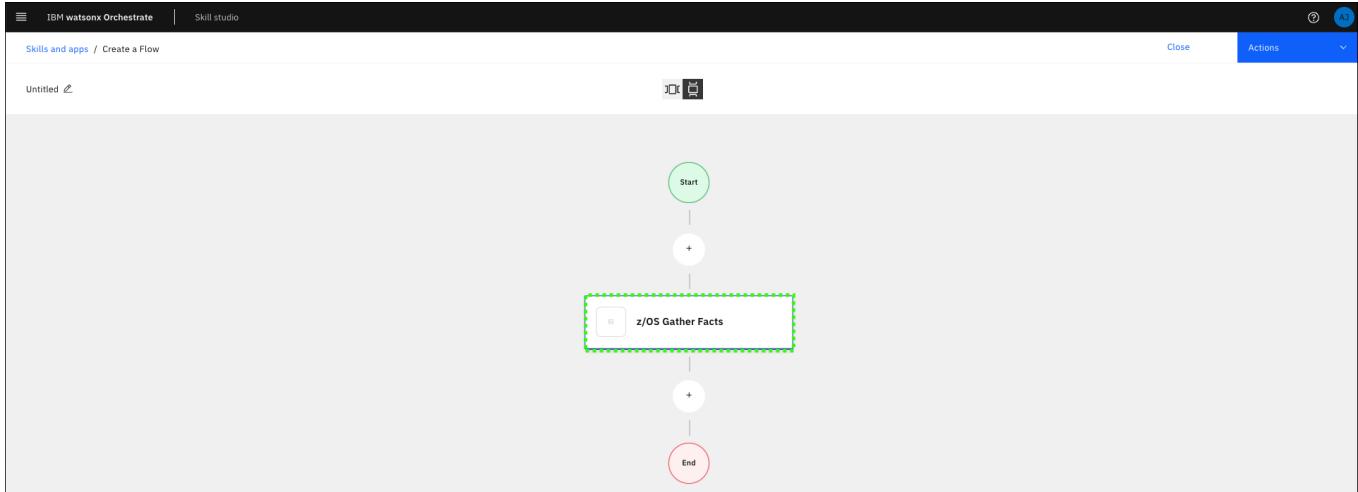
Next, you need to add the **z/OS Gather Facts** skill and the **Retrieve job output** skill to the skill flow. Use the **Search apps** function to locate the skills.

4. Search for the application name you specified earlier and click its tile.

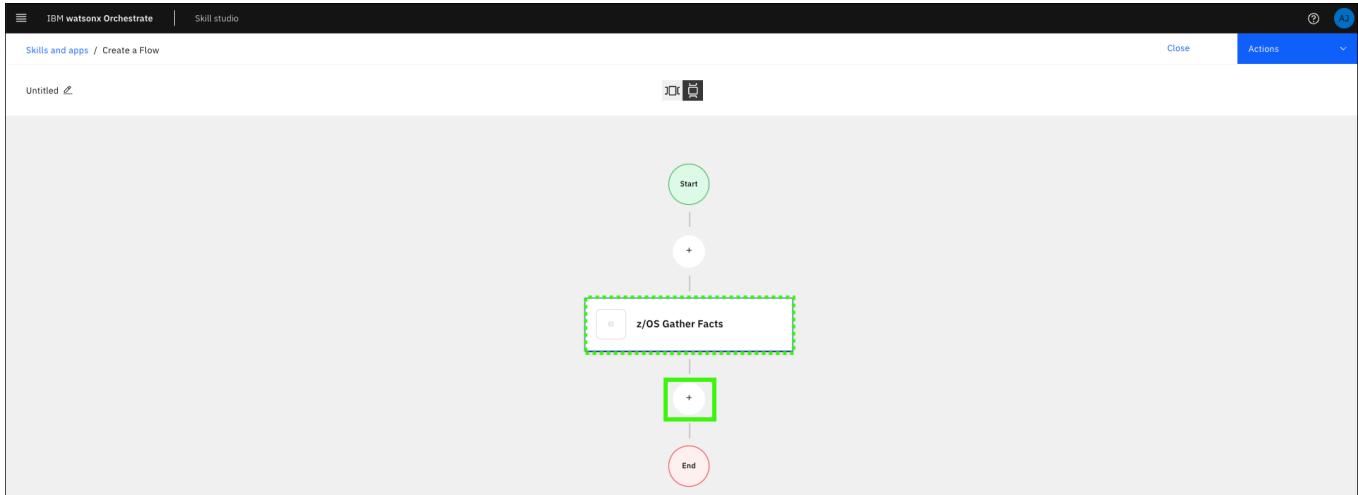
5. Click **Add Skill** in the **z/OS Gather Facts** tile.



6. Verify the **z/OS Gather Facts** skill is added to the skill flow.

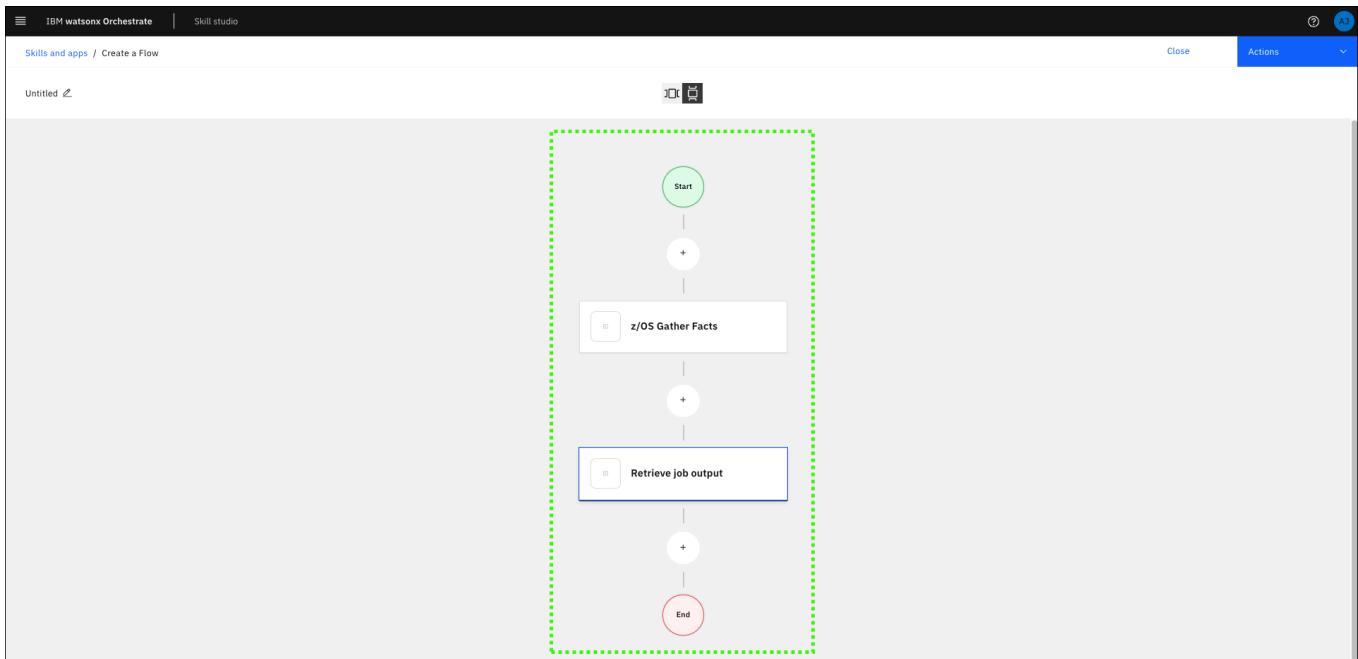


7. Click the + icon after the **z/OS Gather Facts** tile.



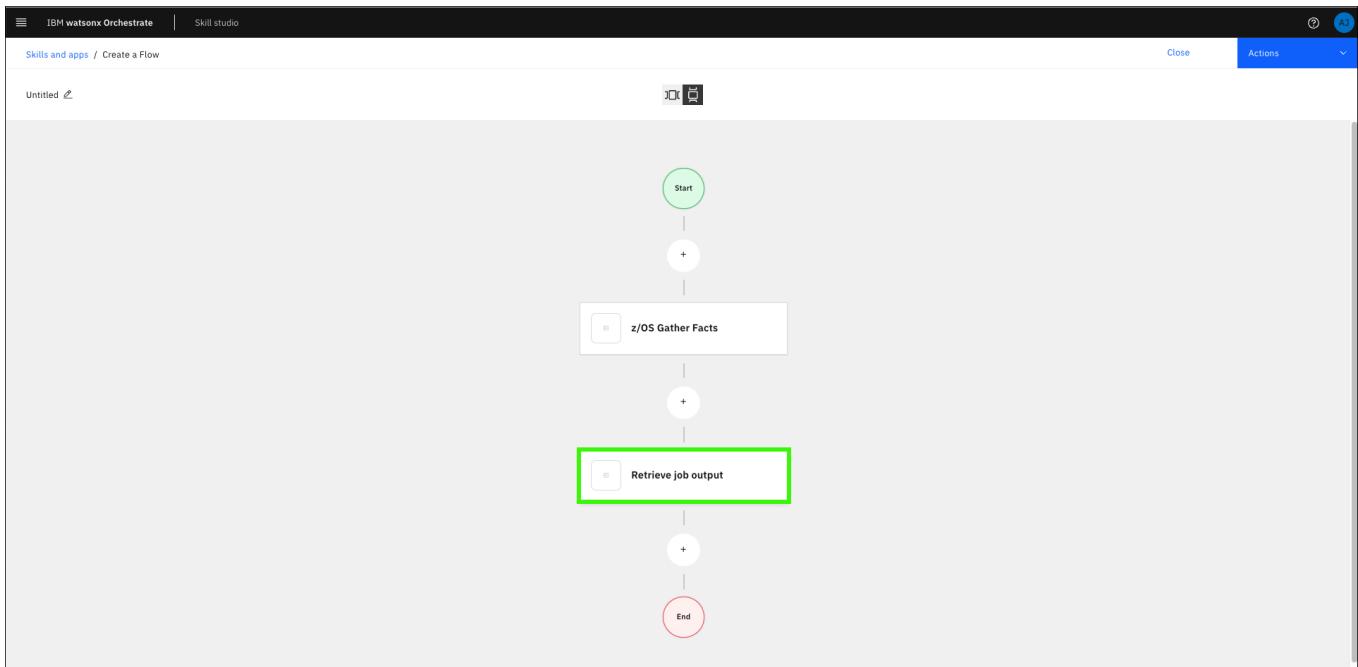
8. Repeat steps 5 and 6 for the **Retrieve job output** skill.

After adding the **Retrieve job output** skill, your skill flow should look like:

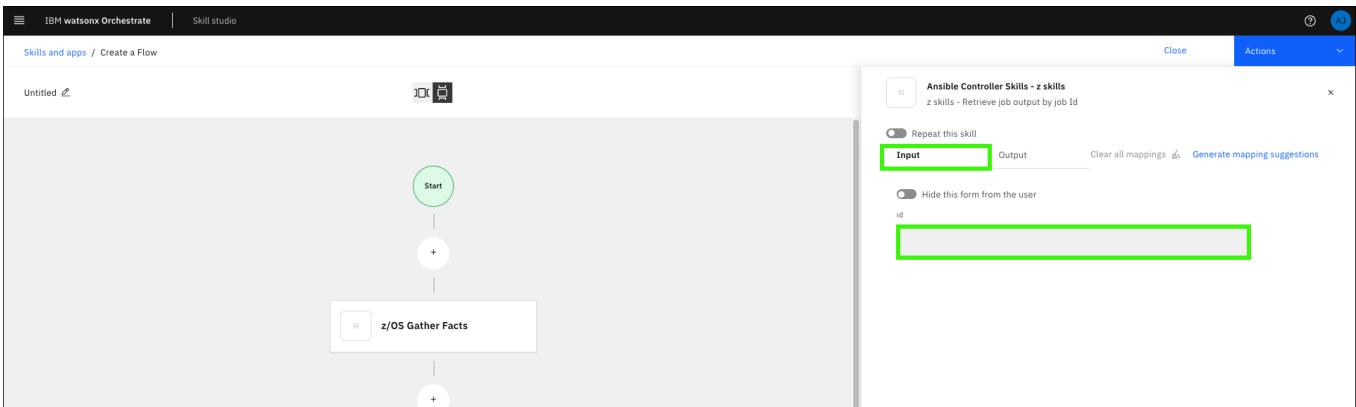


Next you must map the output values of the first skill to the input of the second skill. In this case, pass the “job id” output from **z/OS Gather Facts** as an input for **Retrieve job output**.

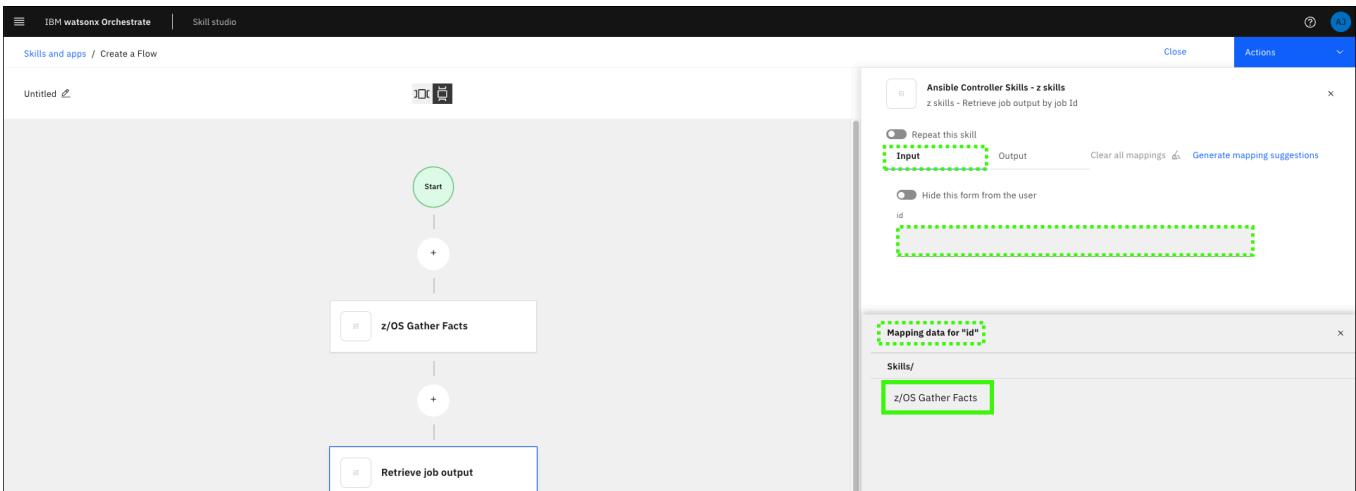
9. Click the **Retrieve job output** tile.



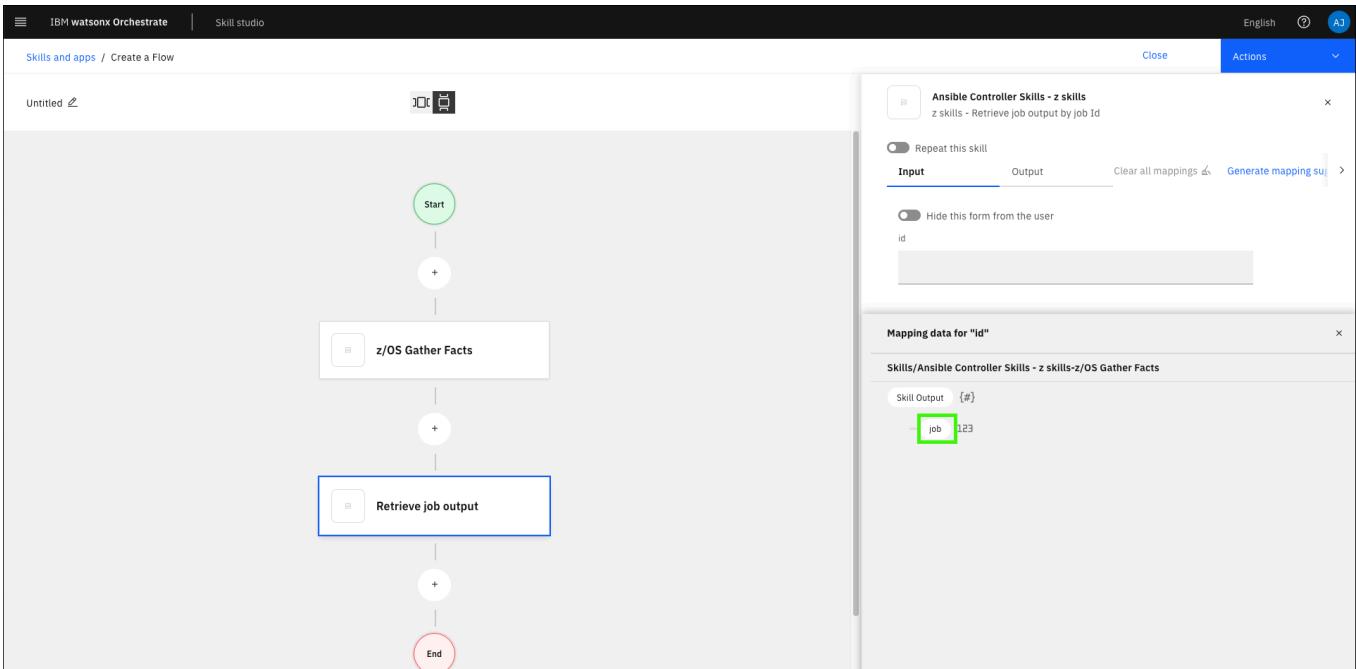
10. Select the **Input** tab and click in the **id** field.



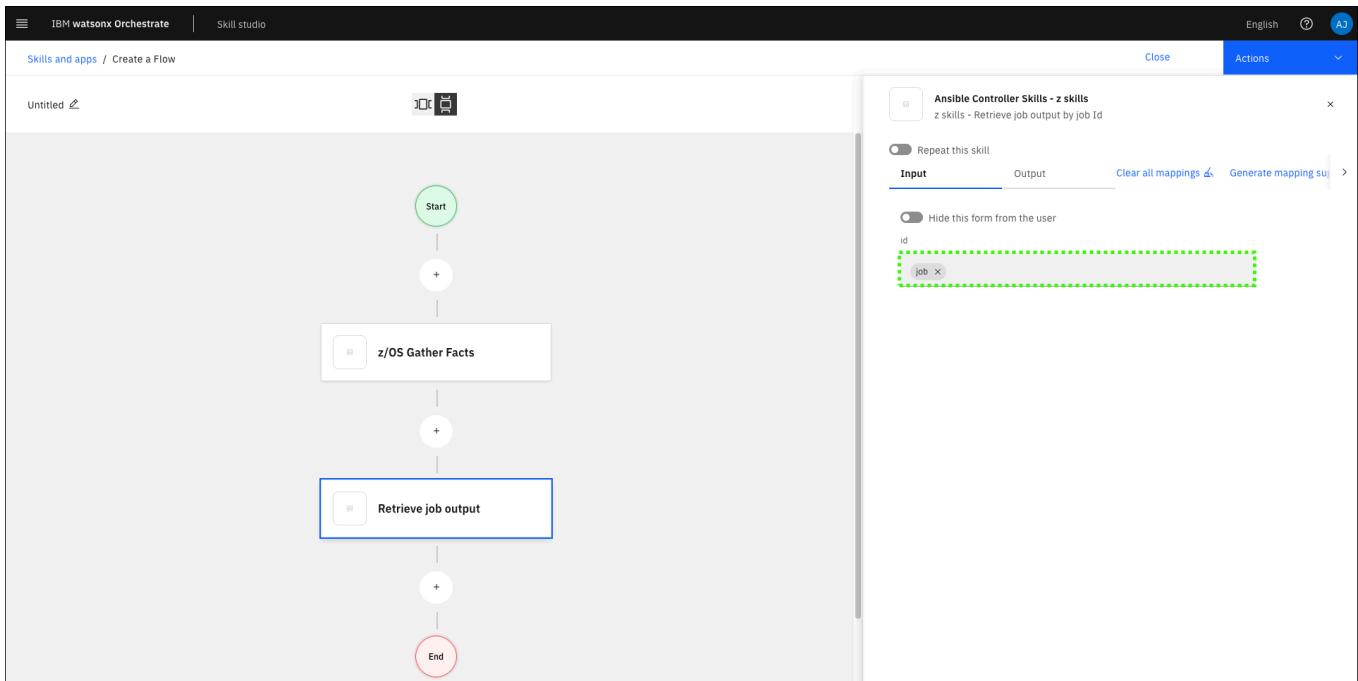
11. Click the **z/OS Gather Facts** skill in the **Mapping data for "id"** section.



12. Click the **job** icon.

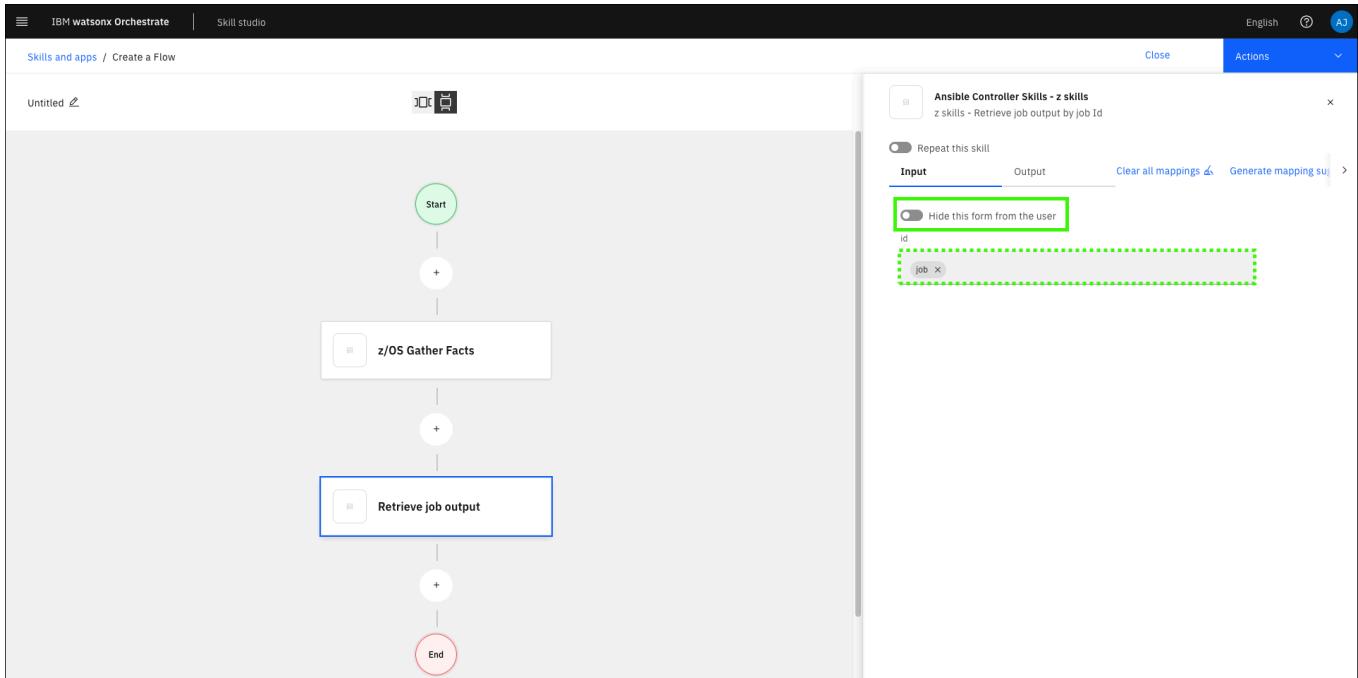


13. Verify the **job** appears in the **id** field.

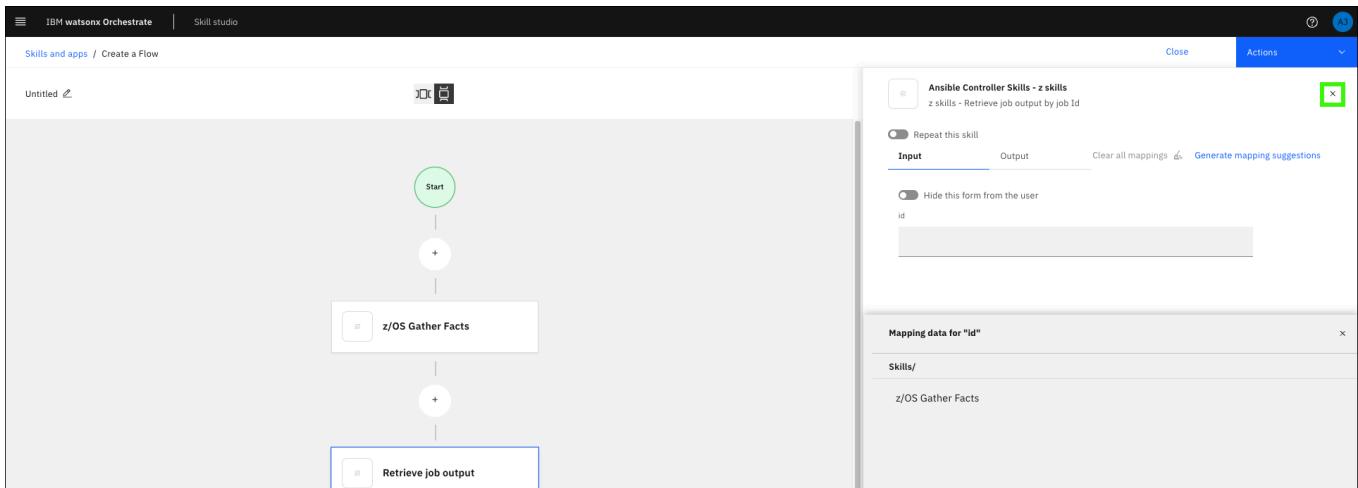


14. Optionally, toggle the **Hide this from the user** setting.

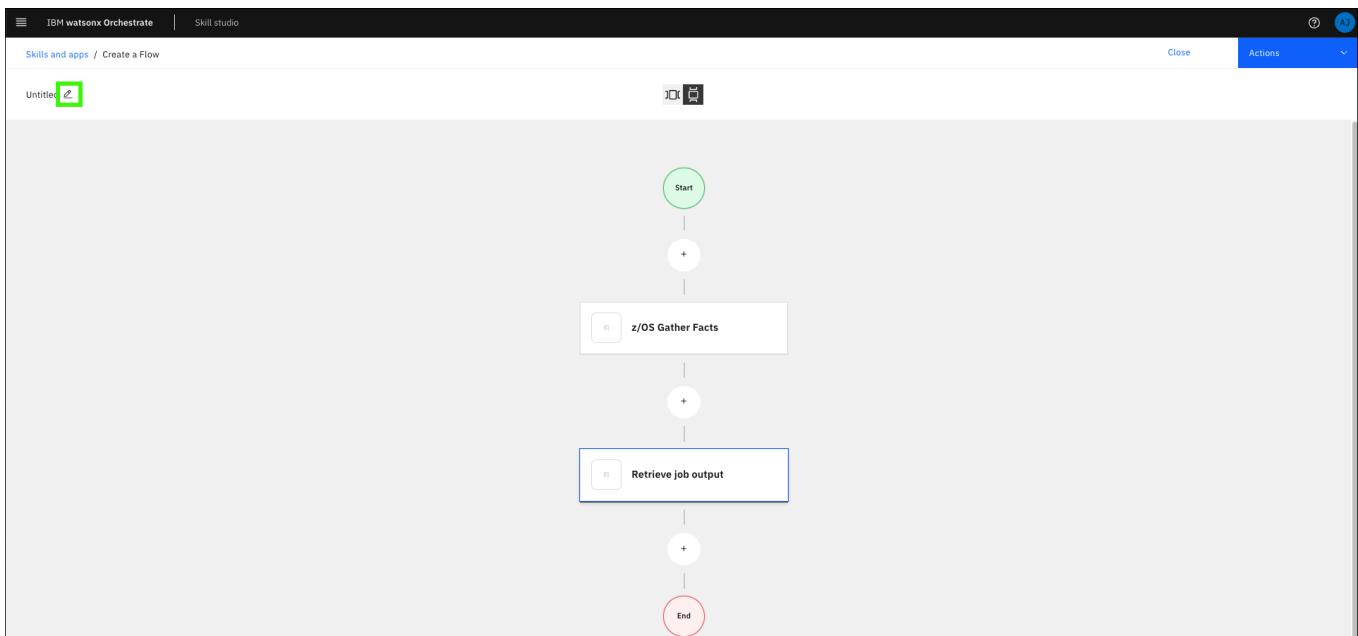
For this lab guide, this option is left disabled. Learn more about this option [here](#).



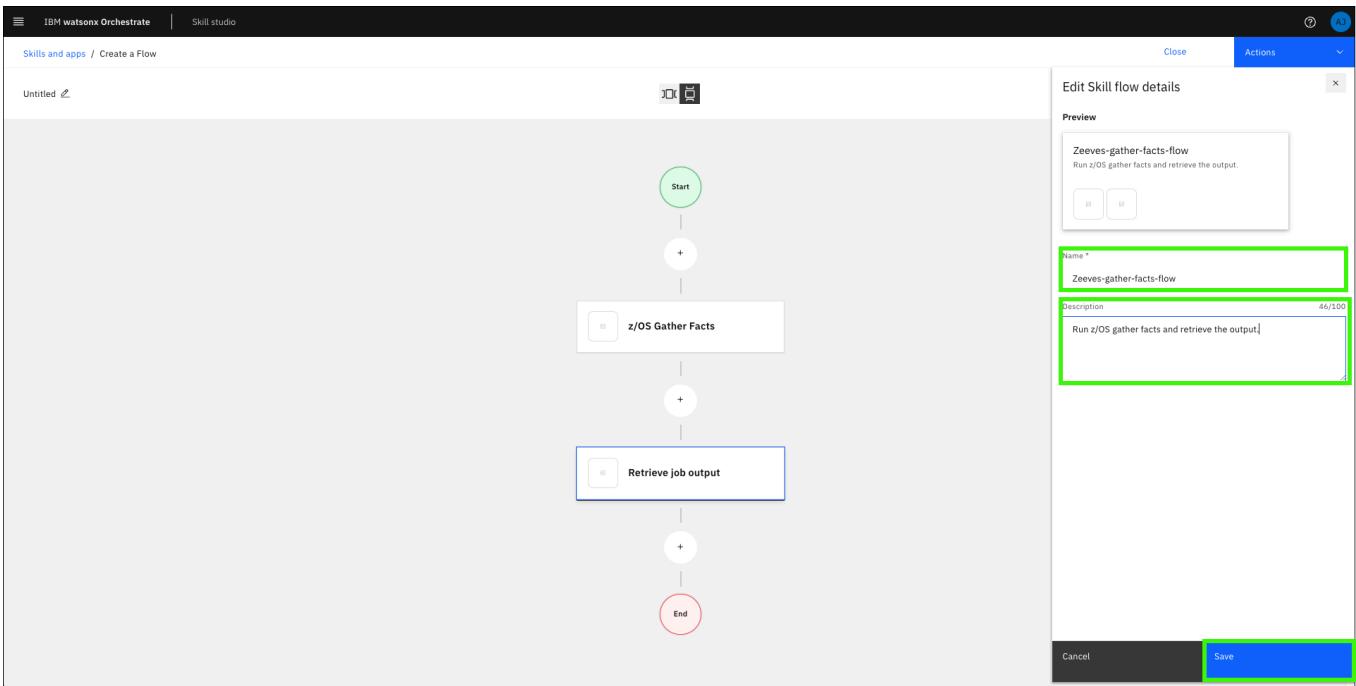
15. Click the x to close mapping window.



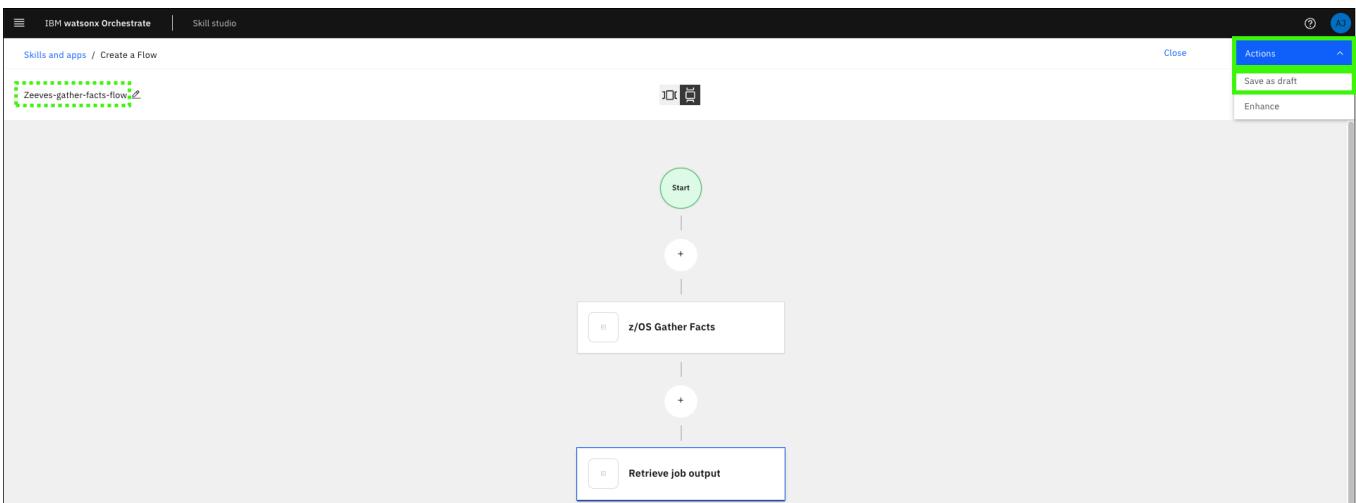
16. Click the pencil ().



17. Enter a (a) **Name** and (b) **Description** for your skill flow and then (c) click **Save**.



18. Expand the **Actions pull-down list and click **Save as draft**.**



19. Expand the **Actions pull-down list and click **Enhance**.**



On the **Enhancing the skill** pages, you can:

- modify the skill name, description, and version
- add phrases (prompts) that will be recognized by the assistant to call the skill flow

20. Click the **Phrases** tab.

The screenshot shows the 'Skill studio' interface for enhancing a skill named 'Zeeves-gather-facts-flow'. The 'Phrases' tab is selected. It displays three sample phrases:

- Zeeves-gather-facts-flow
- Run z/OS gather facts and retrieve the output.
- Enter new train phrase

21. Replace the existing **phrases** (prompts) and then click **Publish**.

Notice the default prompts are either not very intuitive (the skill flow name) or a bit verbose. Replace the existing phrases with phrases that you anticipate users will enter.



Be careful with the sample phrases you specify.

During the development of the lab guide, it was discovered that some sample phrases with a `/` character can cause issues with the actions. Avoid using `z/OS` in your sample phrases. This issue has been reported to the offering team.

Example prompts:

Show me zOS facts

Gather and display zOS facts

Name **Phrases** Next best skills

Phrases are the text your user types in the chat bar to find and use a skill.

Show me zOS facts

Gather and display zOS facts

Enter new train phrase

Cancel Publish Save as draft

Enable the skill flow in your assistant

1. Click **AI assistant builder** in the main menu.

Step in the process	Status	Skill type	Author	Last edited
Ready to use	Published	Skill flow	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024
Ready to use	Published	Imported	andrew@jones-tx.com	November 19 2024

Published successful
Published skill Zeeves-gather-facts-flow.
15:18:32

Configure prebuilt skills

2. Hover over the **Home (🏠)** and click **Actions**.

The screenshot shows the 'Actions' section of the AI assistant builder. On the left, there's a sidebar with options like 'Home', 'Preview', 'Deploy', 'Publish', 'Environments', 'Improve', and 'Analyze'. The 'Actions' tab is selected. In the center, there are several tiles: 'Build actions' (enhance and improve your assistant's actions), 'Customize your greeting' (welcome users in a unique way), 'Create a fallback plan' (train your assistant to adapt to specific situations), 'Preview & debug' (enable debug mode when you preview your assistant), 'Customize web chat' (design how your assistant shows up in your live environment), 'Set up a channel' (select channels for deployment), 'Set up live agent' (integrate live agents to transfer users to when you edit web chat), and 'Public assist' (choose environment for assistance). Below these tiles is a diagram showing a flow from 'Default behavior' to 'General purpose' and 'Conversational search', which then lead to a 'Search' box. A 'New' button is located in the top right corner of the main content area.

3. Click New action.

This screenshot shows the 'Actions' list page. The left sidebar includes 'Actions', 'All items', 'Created by you', 'Variables', 'Saved responses', and 'Created by you' (selected). The main area displays a table of actions. The first row, 'z/OS Gather Facts', has a status of 'Green' and a 'Change' link. A 'New action +' button is highlighted in the top right corner of the table header.

4. Click the Skill-based action tile.

This screenshot shows the 'Create an action' wizard. The title is 'Create an action'. The question 'What kind of action do you want to build?' has three options: 'AI-guided action' (blue background), 'Skill-based action' (purple background, highlighted with a green border), and 'Custom-built action' (green background). Below each option is a brief description and a 'Beta' badge for the first one. At the bottom, there's a note: 'Not sure how to start? Try adding pre-built action templates.' A 'Next' button is visible at the bottom right.

5. Click the skill flow you created earlier and then click Next.

Note: it may take a minute for the tiles to appear on the screen.

Build an action from a skill

Select a skill
Choose a conversational skill published as a foundation of your action.

Search a skill:

Zeeves-gather-facts-flow Run z/OS gather facts and retrieve the output. Last updated: 2024-11-19T21:18:31.793Z	Retrieve job output z skills - Retrieve job output by job Id Last updated: 2024-11-19T20:08:59.538Z	z/OS Ping z skills - This playbook pings the z/OS host to test connectivity. Last updated: 2024-11-19T15:58:20.567Z	z/OS Gather Facts z skills - This sample playbook demonstrates the z/OS gather facts module, which pulls z/OS-specific information from the z/OS host. Last updated: 2024-11-19T15:56:26.843Z	Summarize the Webex meeting transcript in watsonx.ai Last updated: 2024-11-04T10:49:16.502Z
Summarize the Box content in watsonx.ai Last updated: 2024-11-04T10:49:12.077Z	Summarize a Zendesk ticket in watsonx.ai Last updated: 2024-11-04T10:49:09.476Z	Summarize a ServiceNow incident in watsonx.ai Last updated: 2024-11-04T10:49:05.828Z	Summarize a Salesforce opportunity in watsonx.ai Last updated: 2024-11-04T10:49:01.769Z	Sharepoint document summary in watsonx.ai Last updated: 2024-11-04T10:48:55.707Z
Salesloft email summary	Salesforce case summarization	Salesforce case sentiment analyze	Outlook email summary	Github issue summarization

6. Enter an example prompt for the skill and click **Save**.

You can use one of the prompts you used earlier for the skill flow.

Show me zOS facts

Customer starts with:
Example: I want to pay my credit card bill.

Add example phrases:
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.

New action
What does your customer say to start this interaction?

7. Enter any additional phrases (prompts) and then click the **save** (💾).

Customer starts with:
Show me zOS facts

Add example phrases:
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: 1

Show me zOS facts

8. Click close (x).

9. Select the original skill you created (a) (not the skill flow you just created), click the ellipses (b), and then click Delete (c).

10. Wait for system training to complete.

Note: The message will change to "System is trained" and then disappear.

11. Click **Preview**.

The screenshot shows the IBM Watsonx Orchestrate interface. On the left, there's a sidebar with 'Actions' expanded, showing categories like 'All items', 'Created by you', 'Variables', and 'Saved responses'. In the main area, a table lists one item: 'Zeeves-gather-facts-flow'. The table columns include 'Name', 'Last edited', 'Examples count', 'Steps count', and 'Status'. Below the table, there are pagination controls for 'Items per page' (set to 50) and 'Showing 1-1 of 1 items'. At the bottom right, there's a 'Preview' button, which is highlighted with a green box.

12. Enter one of the prompts you specified into the assistant preview.

The screenshot shows the 'Preview' window from the previous step. It displays a simulated conversation between a customer and an AI assistant. The customer says 'Welcome, how can I assist you?' and the AI responds with 'Show me zOS facts'. This message is highlighted with a green box. The preview window also shows the AI's internal state, including the conversational skill called 'Zeeves-gather-facts-flow' and its ID '13'. There are 'Cancel' and 'Apply' buttons at the bottom of the preview window.

13. Wait 10 seconds and then click Apply.

Note: It is important to wait for the first job to complete before submitting the second job in the flow.

The screenshot shows the IBM Watsonx Orchestrator interface. On the left, there's a sidebar with 'Actions' selected. Under 'Created by you', there's a section for 'Variables' which includes 'Created by you', 'Set by assistant', and 'Set by integration'. A 'Saved responses' section is also present. The main area displays a table with one item selected:

Name	Last edited	Examples count	Steps count	Status
Zeeves-gather-facts-flow	11 minutes ago	1	0	Green circle

Below the table, there's a 'Preview' window showing a conversation:

```

    7:54 AM Greet customer [default]
    Welcome, how can I assist you?
    You 8:13 AM Show me zOS facts
    8:13 AM Conversational skill called Zeeves-gather-facts-flow recognized
    Zeeves-gather-facts-flow id * 13 Cancel Apply
  
```

At the bottom, there are buttons for 'Items per page:' (set to 50) and 'Showing 1-1 of 1 items'.

14. Review the results from the skill flow.

Use both scroll bars in the assistant preview to review all of the returned information. The output should be similar to what was seen in the AAP web console. The character strings like [0;32m are special characters that are not properly displayed in the assistant preview interface.

The screenshot shows the same interface as the previous one, but the preview window now displays a detailed list of parameters and their values:

```

    [0m [0;32m "ipl_volume": "D25VS
    [0m [0;32m "load_param_device_
    [0m [0;32m "load_param_dsn": "$S
    [0m [0;32m "lpar_name": "", [0m
    [0m [0;32m "master_catalog_dsn"
    [0m [0;32m "master_catalog_vols
    [0m [0;32m "nucleus_id": "1",
    [0m [0;32m "operator_prompt_flag"
  
```

A green dashed box highlights the list of parameter values. Below the preview window, there's a message: 'There are no additional steps for this action. Add a new step or end the action.' At the bottom right, there's a text input field with 'Type something...' and a 'Send' button.



Sample output from the Z/OS gather facts flow.



Content

```

Identity added: /runner/artifacts/16/ssh_key_data (/runner/artifacts/16/ssh_key_data)
[1;35m[WARNING]: Collection ibm.ibm_zos_core does not support Ansible version 2.14.2[0m

PLAY [Gather z/OS-specific facts.] *****
TASK [Gather all facts about z/OS host.] *****
TASK [Print gathered facts about the master catalog.] *****
[0;32mok: [zos_host][0m
[0;32m      "master catalog dsn: CATALOG.VS01.MASTER",0m [0;32m      "master catalog volser: OPEVS1"[0m
[0;32m ][0m [0;32m}{0m

TASK [Print only CPC and IODF info from gathered z/OS facts.] *****
[0;32mok: [zos_host] => {[0m
[0;32m      "msg": "[0m [0;32m      "manufacturer: IBM",[0m [0;32m      "model: A00",[0m [0;32m      "plant: C1",[0m
[0;32m      "iodf name: PROV.IODF00",[0m [0;32m      "iodf config: DEFAULT"[0m [0;32m ][0m [0;32m}{0m

TASK [Print out all gathered facts about the z/OS host.] *****
[0;32mok: [zos_host] => {[0m
[0;32m      "ansible_facts": {[0m [0;32m      "arch_level": "2",[0m [0;32m      "cpc_nd_manufacturer": "IBM",[0m
[0;32m      "cpc_nd_model": "A00",[0m [0;32m      "cpc_nd_plant": "C1",[0m
[0;32m      "cpc_nd_seqno": "20D90792EB76",[0m [0;32m      "cpc_nd_type": "008562",[0m [0;32m      "edt": "00",
[0m [0;32m      "hw_name": "",[0m [0;32m      "ieasym_card": "(00,K2)",[0m [0;32m      "io_config_id": "00",[0m
[0;32m      "iodate": "",[0m [0;32m      "iodesc": "",[0m [0;32m      "iodf_config": "DEFAULT",[0m
[0;32m      "iodf_name": "PROV.IODF00",[0m [0;32m      "iodf_unit_addr": "DE28",[0m [0;32m      "ioproc": "",[0m
[0;32m      "iotime": "",[0m [0;32m      "ipayloadxx": "K2",[0m [0;32m      "ipl_volume": "D25VS1",[0m
[0;32m      "load_param_device_num": "DE28",[0m [0;32m      "load_param_dsn": "SYS0.IPLPARM",[0m
[0;32m      "lpar_name": "",[0m [0;32m      "master_catalog_dsn": "CATALOG.VS01.MASTER",[0m
[0;32m      "master_catalog_volser": "OPEVS1",[0m [0;32m      "nucleus_id": "1",[0m
[0;32m      "operator_prompt_flag": "M",[0m [0;32m      "parmlib_dsn": "K2.PARMLIB",[0m
[0;32m      "parmlib_volser": "USRVS1",[0m [0;32m      "primary_jes": "JES2",[0m
[0;32m      "product_mod_level": "00",[0m [0;32m      "product_name": "z/OS",[0m
[0;32m      "product_owner": "IBM CORP",[0m [0;32m      "product_release": "05",[0m
[0;32m      "product_version": "02",[0m [0;32m      "smf_name": "VS01",[0m [0;32m      "sys_name": "VS01",[0m
[0;32m      "sysplex_name": "LOCAL",[0m [0;32m      "tsoe_rel": "05",[0m [0;32m      "tsoe_ver": "4",[0m
[0;32m      "vm_name": ""}[0m [0;32m }{0m [0;32m}{0m

PLAY RECAP *****
[0;32mzos_host[0m          : [0; 32mok=4
[0m changed=0  unreachable=0  failed=0  skipped=0  rescued=0  ig nored=0

```

The scenario shown above may or may not be relevant for your client's use case. It is intended to show you how to sequence skills together in a skill flow to create an action that your assistant triggers based on prompts using the pre-configured Ansible automation templates. You are encouraged to create your own skill flows and prompts using other skills available within the AAP instance.

Next, learn about custom-built actions.

Creating custom-built actions

To this point, you have learned how to:

- import skills into Watson Assistant Orchestrate
- add applications with those skills to your assistant
- create skill-based actions for your assistant
- combine skills in a skill flow

There is also the ability to create **custom-built** actions. Custom-built actions allow you to create new actions with different steps to take in conversations and form sequences of prompts that define the conversation experience. The steps can be defined with or without conditions, which help control the custom responses. Steps within the custom action can end with routing to conversational search, triggering another existing sub-action, and other actions. This is a powerful way of customizing the end-user's experience.

Learn more about creating custom-built actions [here](#).

Importing pre-packaged z/OS skills

Provided with Version 2 of watsonx Assistant for Z is a set of pre-packaged skills which can be used to automate various tasks on z/OS, such as running different console commands and retrieving logs from batch jobs.

The list of pre-packaged skills available include:

- Authorized program list
- z/OS IPL Information
- Display zOS parmlib datasets
- Unix System services options
- Display zOS subsystems
- List spool files
- Retrieve dataset content
- Retrieve spool file content
- Retrieve z/OS Management Facility (OSMF) job status

IBM watsonx Orchestrate requires that any OSMF environment you connect to for skill execution has certificate authority (CA) signed certificates. In the case of the Ansible Automation Platform (AAP) & Wazi z/OS environment provisioned in IBM Technology Zone (ITZ), the z/OS system is not currently using CA signed certificates and therefore cannot execute the pre-packaged skills on your own z/OS system. For demo purposes, it is still recommended to import them so that the pre-packaged skills can be shown.

Work is in progress to modify the ITZ environments so that they are enabled for skill execution using these pre-packaged skills. In the meantime, the underlying automation for these pre-packaged skills can still be demonstrated using the Ansible skill 'z/OS Operator Command' which is available to import. This works because the pre-packaged skills are executing console commands directly using OSMF APIs which can also be run using the Ansible template skill 'z/OS Operator command'. For example, here are the console commands being used in some of the pre-packaged skills:

- Authorized Program list – `operator command -> d prog,lnklist`
- z/OS IPL Information - `operator command -> d iplinfo`
- Display zOS parmlib datasets - `operator command -> d parmlib`

You can import the pre-packaged skills into your sandbox environment by downloading the .zip file from [here](#) and following [these instructions](#).

You must extract the imbedded JSON file and modify the file for your environment by following [these instructions](#).

Publishing and deploying your assistant

To this point, acting as an Assistant Builder, you have built out the assistant, configured conversational search, and added skills and automations. While doing so, you have been testing your assistant using the **preview** capability of AI Assistant Builder. The **preview** capability is a closed environment for experimenting with prompts.

After your assistant is finalized, you can publish it to make it available to end-users. Each assistant you create comes with two **environments**: *draft* and *live*. You have been configuring your assistant in the draft environment. Each environment has its own set of IDs, URLs, and service credentials that can be referenced by external services.

The **Environments** page in the AI assistant builder has tabs for managing both the **Draft environment** and the **Live environment**:

This screenshot shows the 'Environments' page in the AI assistant builder. The 'Draft' tab is selected, indicated by a green dashed border. The 'Live' tab is also present. On the left, there's a sidebar with icons for environments, channels, and integrations. The main area has sections for 'Draft environment' (described as for internal preview), 'Channels' (listing 'Web chat'), and 'Resolution Methods' (showing 'Draft content' last edited on 11/19/2024 at 03:32PM). A 'Preview this environment' button is in the top right. A callout points to the 'Last edited' timestamp in the 'Draft content' section.

This screenshot shows the 'Environments' page in the AI assistant builder. The 'Live' tab is selected, indicated by a green dashed border. The 'Draft' tab is also present. The layout is similar to the Draft environment page, with sections for 'Live environment' (described as for deployment to customers), 'Channels' (listing 'Web chat'), and 'Resolution Methods'. A 'Content' section shows 'No published version' with a 'Publish version' button. A callout points to this section.

The **Draft environment** contains all your in-progress work in the Actions, Preview, and Publish pages. Use the **Draft environment** tab to build out your assistant and use for internal testing before deployment. Any integrations you use (i.e. channels) for the **Draft environment** are unique to that environment, and changes to draft integrations don't affect the **Live environment**.

Publish the assistant

Each time that you publish, you're creating a new version of the assistant, for example V1. When you publish your content, you're creating a snapshot of the draft content, resulting in a version.



Versions do not contain integration configurations or environment settings

Published versions contain all of the content from actions, including settings and variables. **However, versions do not contain integration configurations or environment settings.** Integration configurations and environment settings must be configured manually in each environment.

For managing quality-control and versioning, the Live environment is the version of the assistant you should be giving access to the end-user.

Follow these steps to publish the first version of your assistant using Assistant Builder:

1. Hover over the **Home** icon () and click **Publish**.

The screenshot shows the 'Publish' step in the AI assistant builder. The left sidebar has 'Home' selected. The main area displays several steps: 'Build actions', 'Customize your greeting', 'Create a fallback plan', 'Preview & debug', 'Customize web chat', 'Set up a channel', 'Set up live agent', and 'Public assist'. Below these steps is a diagram showing a 'Default behavior' node branching into 'General purpose' and 'Conversational search' nodes, which then lead to a 'Search' node. A tooltip for 'General purpose' says 'granite-3-Bd-instruct' with a 'Change' link.

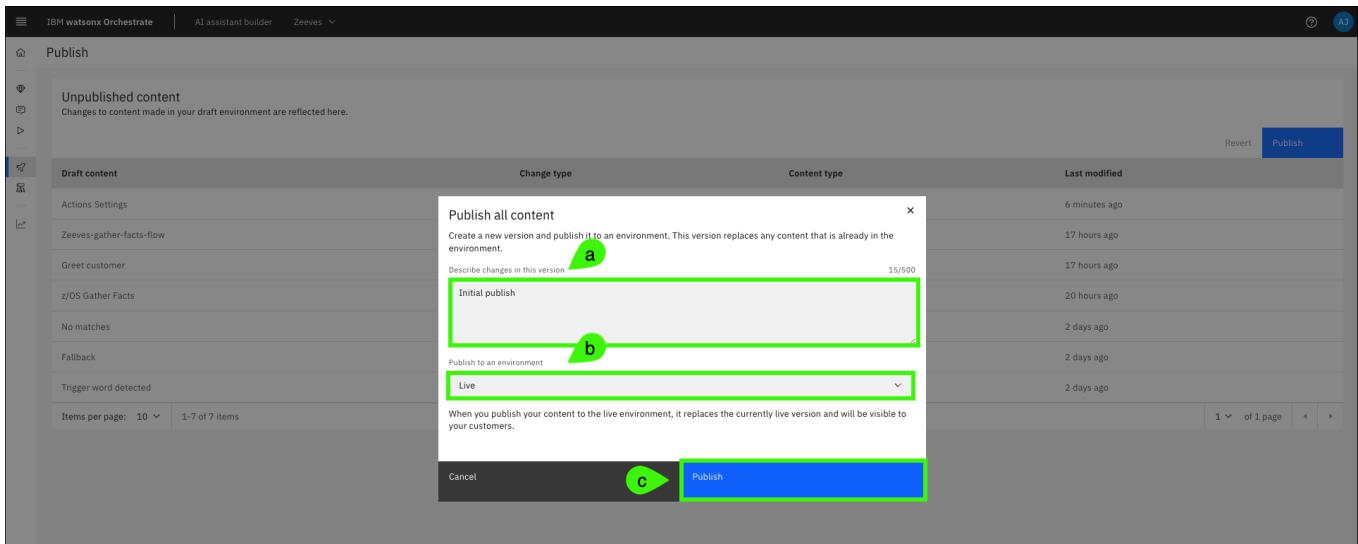
2. Click **Publish**.

The screenshot shows the 'Publish' step in the AI assistant builder. The left sidebar has 'Publish' selected. The main area shows a table of 'Draft content' changes:

Draft content	Change type	Content type	Last modified
Zeeves-gather-facts-flow	Updated	Actions	30 minutes ago
Greet customer	Updated	Actions	31 minutes ago
Actions Settings	Updated	Settings	2 hours ago
Fallback	Updated	Actions	2 hours ago
No matches	Updated	Actions	2 hours ago
Trigger word detected	Updated	Actions	2 hours ago

At the bottom, there are pagination controls: 'Items per page: 10' and '1-6 of 6 items'.

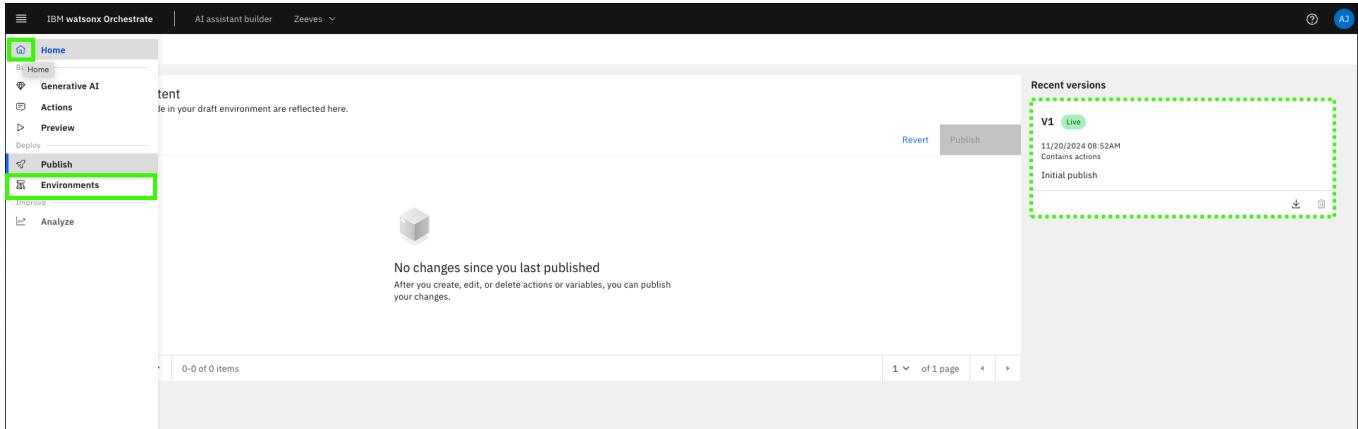
3. Enter a description of the changes (a), set the environment to **Live** (b), and then click **Publish** (c).



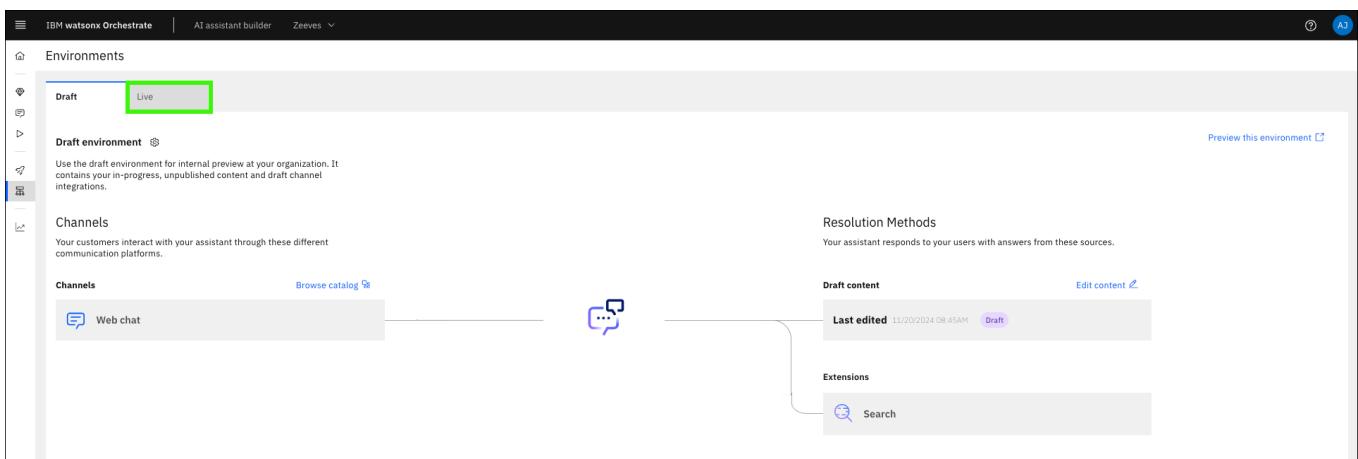
Configure the live environment

Important: When the live environment is created, the environment settings from the draft environment are not carried over (for example the configuration of the OpenSearch instance used for conversational search).

1. Hover over the **Home** icon (🏡) and click **Environments**.



2. Click **Live**.



3. Click Web chat.

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there are tabs for 'IBM Watsonx Orchestrate', 'AI assistant builder', and 'Zeeves'. Below the tabs, the 'Environments' section is visible, with 'Live' selected over 'Draft'. Under 'Live environment', there is a brief description: 'Use the live environment for deployment to customers. It contains your published content and channel integrations where customers interact with your assistant.' The 'Channels' section lists 'Web chat' (which is highlighted with a green box), 'Browse catalog', and a 'Channels' icon. To the right, there are sections for 'Resolution Methods', 'Content' (version V1, 11/20/2024 08:52AM, status Live), and 'Extensions' (Search). A large blue arrow points from the 'Web chat' channel entry to the 'Content' section.

4. Customize the live assistant as you see fit.

On the **Style** tab, you're able to set the Assistant name which will be displayed at the top of the chat window when end-users are interacting with the assistant. For pilots or demos, you may want to personalize this name for the client. Also in the **Style** tab, you have the ability set the themes and display settings of the chat windows, including the ability to enable the IBM Watermark and enable streaming (recommended).

On the **Home** tab, you enable and customize a default greeting message from the assistant when the user accesses the assistant chat. You're also able to set Conversation starters that will be displayed in the chat window. When selected by the end-user, the text of these conversation starters are sent as prompts, so it is important that your assistant is trained and tested to answer appropriately. It is highly recommended to remove these default conversation starters and to consider creating your own as long as they're able to be executed as actions and provide value to the end-user. At the bottom of the Home screen tab, you will also see the ability to add a Background style for the assistant chat window.

Explore all the other tabs.



Customize your live environment.

For this lab, toggle **Streaming** on and turn **Suggestions** off on the **Suggestions** tab. You may also want to change the theme to **Dark** to differentiate your draft and live environments.

The screenshot shows the 'Style' tab selected in the navigation bar. The 'Suggestions' button is highlighted with a green box. The right side of the screen displays a preview of the AI assistant's user interface, which is currently set to a dark theme. It features a blue owl icon, a message input field, and a list of examples like 'Find nearby location', 'Check account balance', and 'See how I can help'.

5. Click Save and exit.

The screenshot shows the 'Save and exit' button highlighted with a green box. The rest of the interface and preview window are identical to the previous screenshot, indicating that the changes have been saved.

6. Click Add in the Search tile.

The screenshot shows the 'Live' environment configuration in IBM Watsonx Orchestrate. It includes sections for 'Live environment', 'Channels' (Web chat), 'Resolution Methods' (Content V1), and 'Extensions' (Search). A green box highlights the 'Add +' button under Extensions.

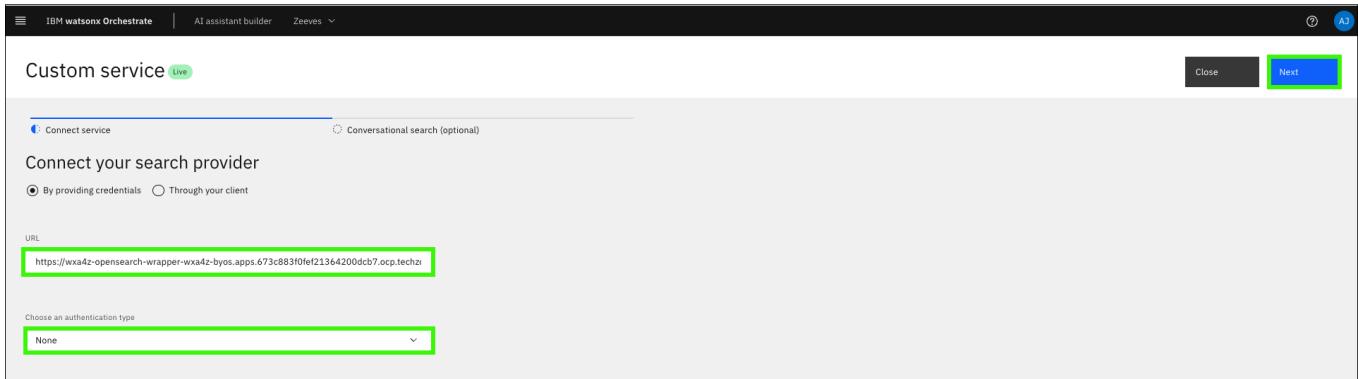
7. Click Custom service.

The screenshot shows the 'Set up a new search integration' dialog box. It lists 'Es' (Elasticsearch) and 'Custom service'. The 'Custom service' option is highlighted with a green box.

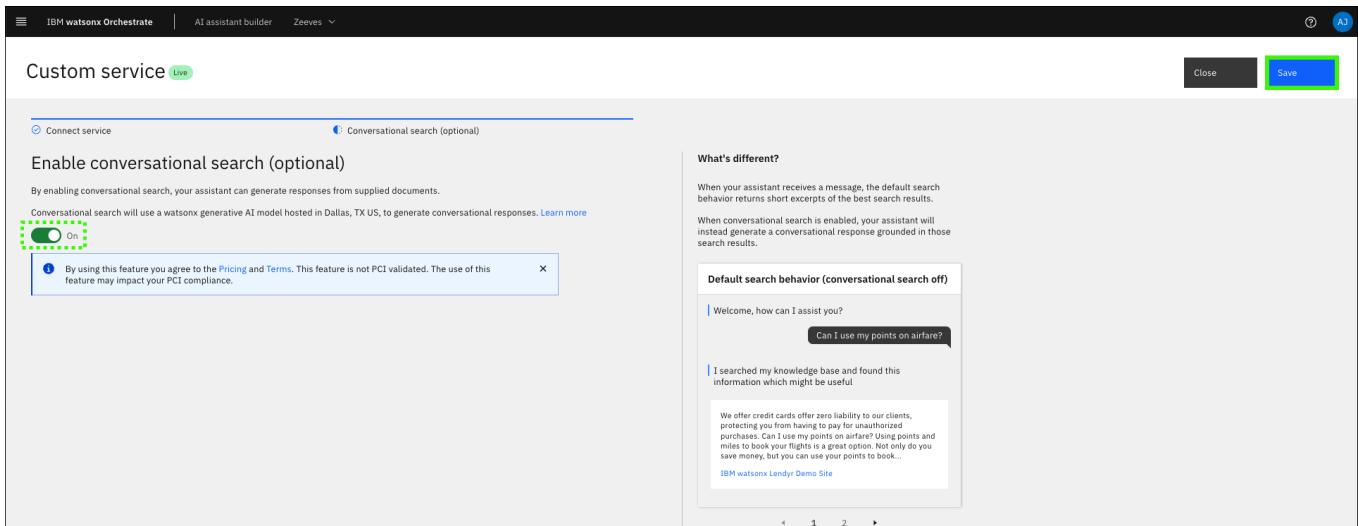
- Enter the URL for your bring-your-own-search (BYOS) engine (a), select None for the authentication type (b), and then click Next (c).

⚠️ Use the correct URL!

Be sure to use the URL for your BYOS OpenSearch engine created earlier [here](#).



9. Verify conversational search is enabled and click **Save**.



10. Update the **Custom service** settings (a-f), click **Save** (g), and then click **Close** (h).



Feel free to customize the settings.

This is your assistant. Feel free to customize the settings. The settings shown below reflect the changes made earlier in the lab guide to the draft version of the assistant. This includes the **Metadata** field to weigh ingested client documents higher using:

```
{
  "doc_weight": {
    "product_docs": 0.2,
    "customer_docs": 0.8,
    "ibm_indices": "*_ibm_docs_slate",
    "customer_indices": "customer_*"
  }
}
```

Custom service Live

Settings Instance

By using this feature you agree to the [Pricing](#) and [Terms](#). This feature is not PCI validated. The use of this feature may impact your PCI compliance.

Conversational search

Use a Watson generative AI model hosted in Dallas, TX US, to generate conversational responses.

[Learn more](#)

Conversational search

a On

b Off

Context-dependent search

c Single turn

This assistant uses only the current user input for retrieving search results and generating answers. This works well for clear, complete inputs but generally won't work with context-dependent queries such as, "Why is that?" after a previous answer.

d Entire conversation Beta

The assistant uses the entire session history for retrieving search results and generating answers. This handles context-dependent questions well but may over-rely on past topics, even if the user has moved on.

Define the text for the citations title. ⓘ

How do we know?

Search configuration

To test this, go to the [evaluations page](#) Restore default

e Retrieval confidence threshold ⓘ

f Lowest

Low High Highest

Generated response length ⓘ

Concise

g Verbose

Moderate

Response confidence threshold ⓘ

h Lowest

Low High Highest

Citations

Citations will be displayed to the end user. This doesn't impact the number of citations used in the response.

Citations shown in web chat

All

Default filter

Can be anything (plain text, JSON, etc)

Metadata

```
{"doc_weight": 1.0,
"product_docs": 0.2,
"customer_docs": 0.8,
"ibm_indices": "**.ibm_docs.state",
"customer_indices": "customer_**"}
```

Search display text

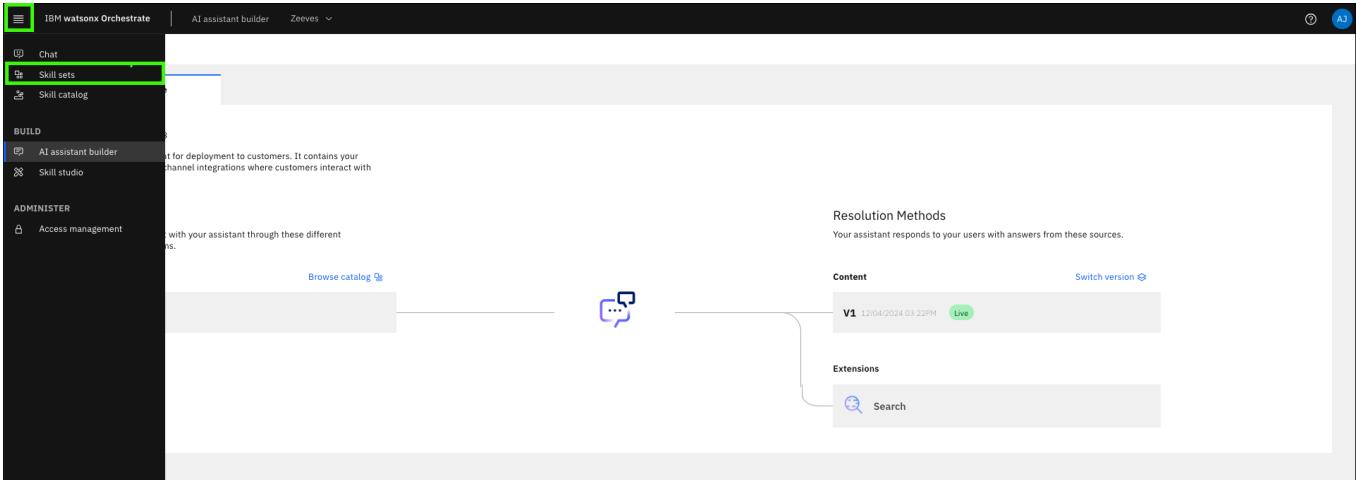
Define the text your search will display to the end user

No results found Connectivity issue

I searched my knowledge base, but did not find anything related to your query

Connect the skills to the live environment

1. Click **Skill sets** in the main menu.



2. Select your assistant's live instance in the **Skill sets** list.

Name	App
Zeeves live	

3. Click **Connections**.

Name	App
z/OS Gather Facts	
Zeeves-gather-facts-flow	
Retrieve job output	

4. Search for the application name you specified earlier.

Skill sets

Zeeves live

Skills Connections

These are the applications that are used by the skills in team skill set. Application connections are required to execute skills. Set preference at an application level to enable skills to either use personal or team credentials.

Application	Number of skills	Credential type	Connected by	Action
Ansible Controller Skills - z skills	3	Not specified	-	⋮

Items per page: 5 1-1 of 1 items

5. Click the ellipses (⋮) for your app and then click **Connect app**.

Connect to Ansible Controller Skills - z skills

Member credentials
Each team member uses their own credentials to connect to this app and use its skills.

Team credentials
The admin sets the credentials each team member uses to connect to this app and use its skills.

You selected Team credentials for the credential type. Click Connect app to provide the credentials your team will use and to connect to the app.

Connect app

6. Click **Connect app**.

Skill sets

Zeeves live

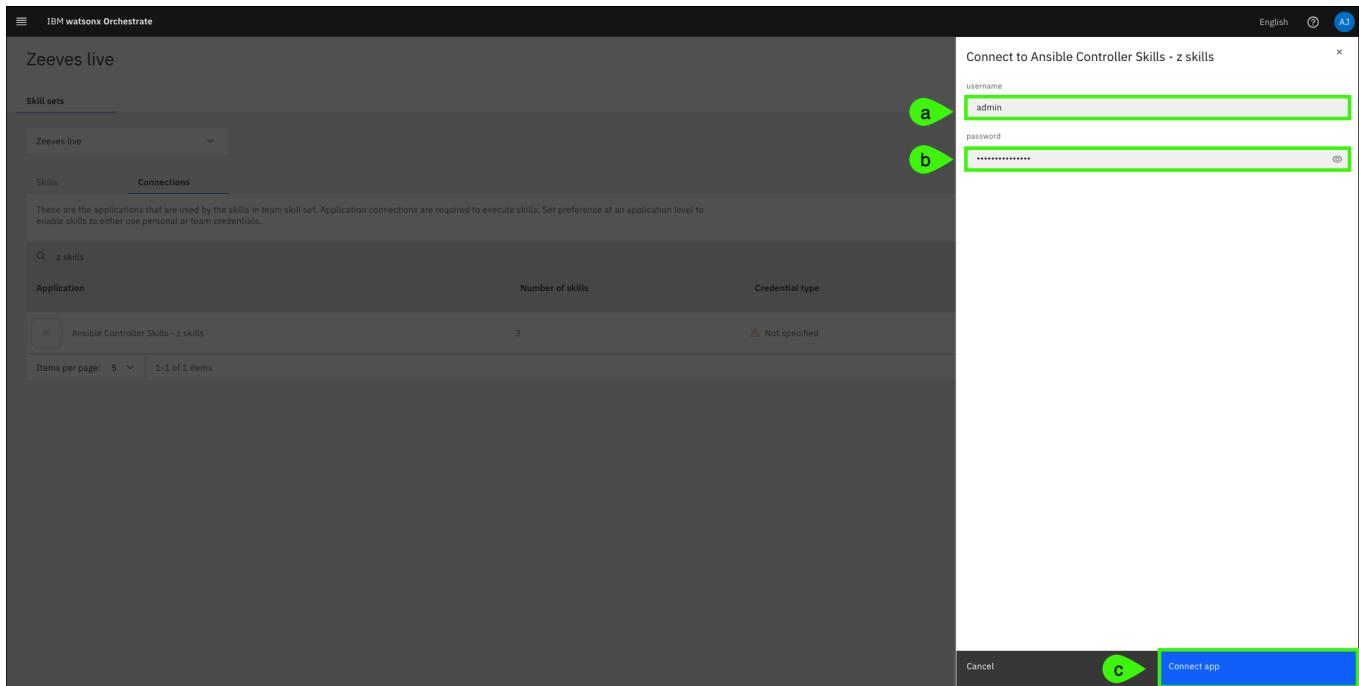
Skills Connections

These are the applications that are used by the skills in team skill set. Application connections are required to execute skills. Set preference at an application level to enable skills to either use personal or team credentials.

Application	Number of skills	Credential type	Connected by	Action
Ansible Controller Skills - z skills	3	Not specified	✓	⋮

Items per page: 5 1-1 of 1 items

7. Enter the **username (a)** and **password (b)** using the username (`admin`) and password for your IBM Technology Zone (ITZ) watsonx Assistant for Z Pilot - AAP & z/OS reservation, and then click **Connect app (c)**.



Learn more about publishing your assistant and creating live environments [here](#).

Deploy the assistant

After configuring your assistant's settings and publishing, the final step is to deploy your assistant which can be done across various channels depending on the use case.

There are several options for deploying your assistant through channels and integrations to satisfy the use cases that you might address. Learn more about all the deployment options [here](#).

For this lab, you will deploy the assistant using the web chat integration. The web chat integration provides an assistant interface that can integrate with your website. There is a lot of flexibility with how you may want to integrate it. Learn more about the web chat integration [here](#).

1. Open the **Environments** page in [AI assistant builder](#).
2. Click **Web chat** for the **Live** environment.

The screenshot shows the IBM Watsonx Orchestrate dashboard. At the top, there are tabs for 'Environments' (Draft and Live), 'AI assistant builder', and 'Zeeves'. In the main area, under 'Live environment', it says 'Use the live environment for deployment to customers. It contains your published content and channel integrations where customers interact with your assistant.' Below this, under 'Channels', 'Web chat' is selected (indicated by a green border). To the right, there are sections for 'Resolution Methods' (Content and Extensions), 'Switch version' (V1, Live), and 'Search'.

3. Click the **Embed** tab.

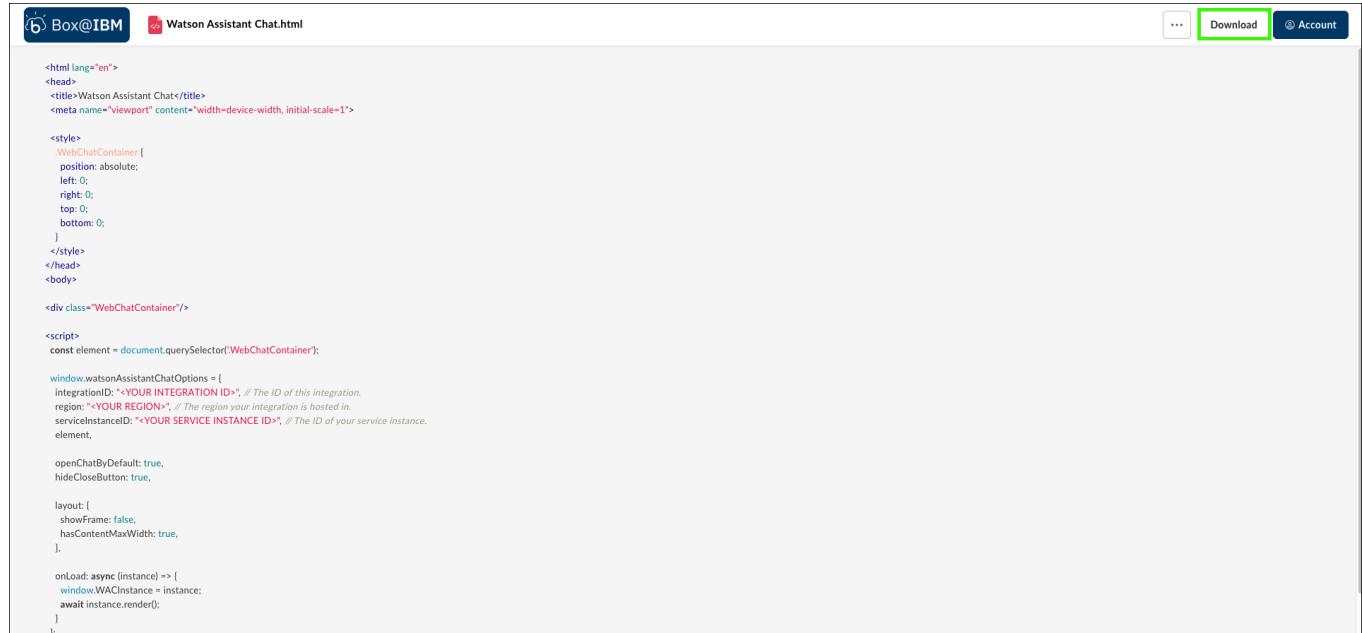
The screenshot shows the 'Web chat' configuration page. The 'Style' tab is selected. On the right, there's a preview window titled 'Zeeves 1.0' showing a dark-themed web chat interface with an owl avatar and sample messages. The 'Embed' tab is highlighted with a green border. Other tabs include 'Launcher', 'Home screen', 'Live agent', 'Suggestions', 'Security', 'Resources', and 'Save and exit'.

4. Copy and record the `integrationID`, `region`, and `serviceInstanceId` values.

The screenshot shows the 'Web chat' configuration page with the 'Embed' tab selected. The 'Style' tab is also visible. The main area displays a script block with placeholder values for 'integrationID', 'region', and 'serviceInstanceId'. These values are highlighted with a green border. The script includes comments explaining their purpose: // The ID of this integration, // The region you're integrating to, and // The ID of your service instance.

5. Click the link below to download a sample web chat hyper text markup language (HTML) page.

Watson Assistant Chat.html



```

<html lang="en">
<head>
<title>Watson Assistant Chat</title>
<meta name="viewport" content="width=device-width, initial-scale=1">

<style>
.WebChatContainer {
  position: absolute;
  left: 0;
  right: 0;
  top: 0;
  bottom: 0;
}
</style>
</head>
<body>

<div class="WebChatContainer">

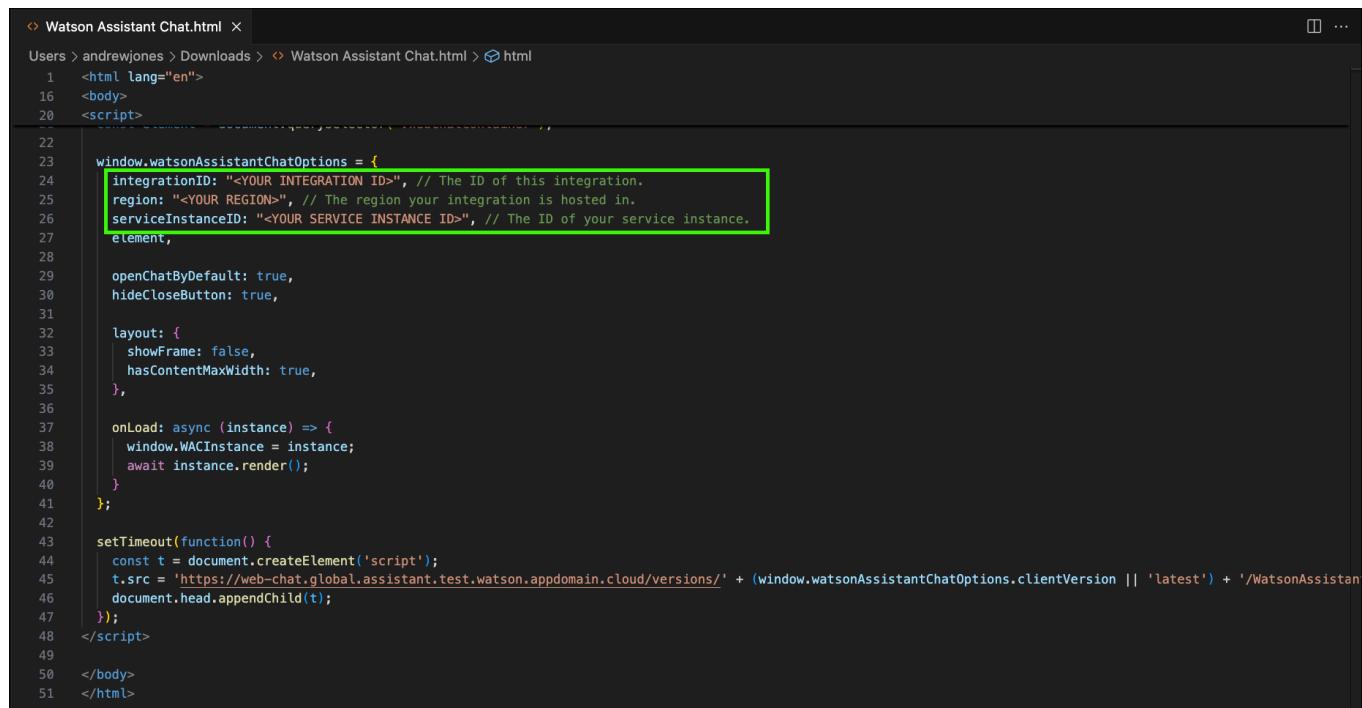
<script>
const element = document.querySelector('WebChatContainer');

window.watsonAssistantChatOptions = {
  integrationID: "<YOUR INTEGRATION ID>", // The ID of this integration.
  region: "<YOUR REGION>", // The region your integration is hosted in.
  serviceInstanceId: "<YOUR SERVICE INSTANCE ID>", // The ID of your service instance.
  element,
  openChatByDefault: true,
  hideCloseButton: true,
  layout: {
    showFrame: false,
    hasContentMaxWidth: true,
  },
  onLoad: async (instance) => {
    window.WACInstance = instance;
    await instance.render();
  }
};

setInterval(function() {
  const t = document.createElement('script');
  t.src = 'https://web-chat.global.assistant.test.watson.appdomain.cloud/versions/' + (window.watsonAssistantChatOptions.clientVersion || 'latest') + '/WatsonAssistant';
  document.head.appendChild(t);
}, 1000);
</script>
</body>
</html>

```

6. In a text editor, open the `Watson Assistant Chat.html` file and insert the values for your assistant you copied in step 3.



```

Watson Assistant Chat.html ×
Users > andrewjones > Downloads > Watson Assistant Chat.html > html
1   <html lang="en">
16  <body>
20  <script>
22
23  window.watsonAssistantChatOptions = {
24    integrationID: "<YOUR INTEGRATION ID>", // The ID of this integration.
25    region: "<YOUR REGION>", // The region your integration is hosted in.
26    serviceInstanceId: "<YOUR SERVICE INSTANCE ID>", // The ID of your service instance.
27    element,
28
29    openChatByDefault: true,
30    hideCloseButton: true,
31
32    layout: {
33      showFrame: false,
34      hasContentMaxWidth: true,
35    },
36
37    onLoad: async (instance) => {
38      window.WACInstance = instance;
39      await instance.render();
40    }
41  };
42
43  setTimeout(function() {
44    const t = document.createElement('script');
45    t.src = 'https://web-chat.global.assistant.test.watson.appdomain.cloud/versions/' + (window.watsonAssistantChatOptions.clientVersion || 'latest') + '/WatsonAssistant';
46    document.head.appendChild(t);
47  });
48 </script>
49
50 </body>
51 </html>

```

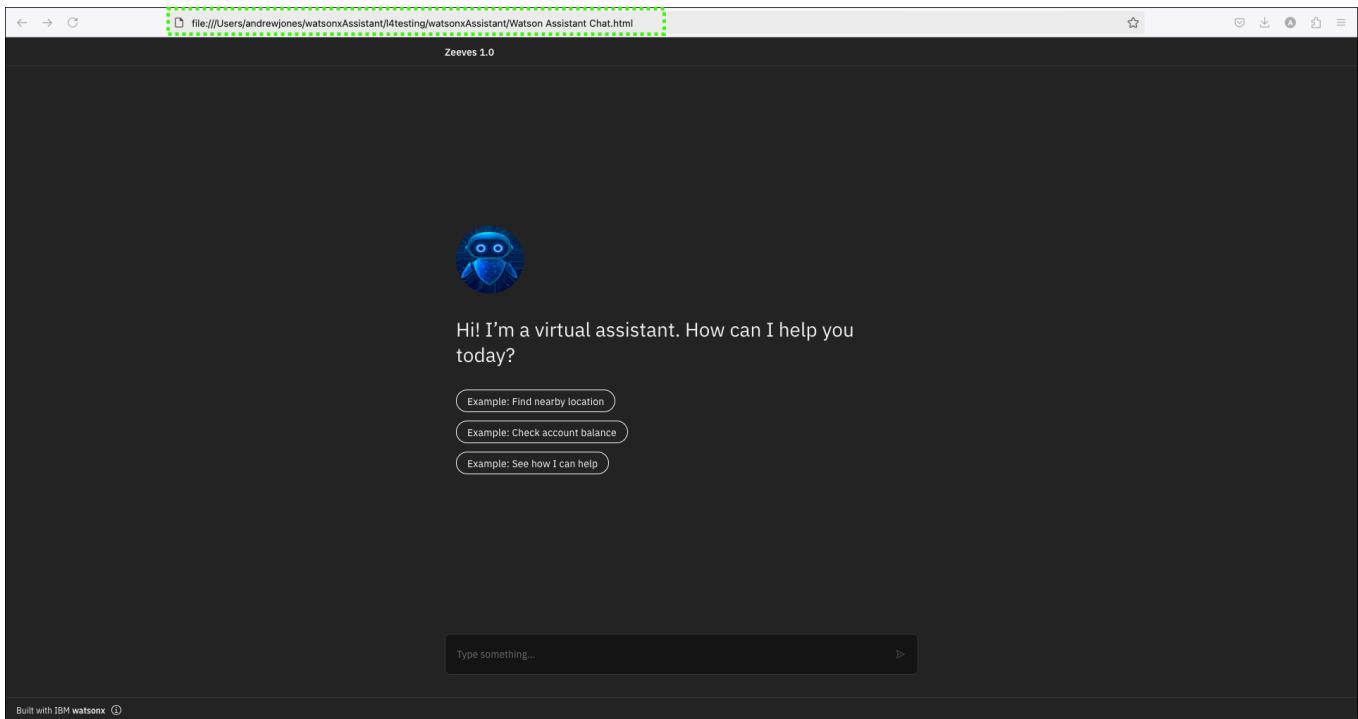
7. Save the changes to the `Watson Assistant Chat.html` file.

```

Users > andrewjones > Downloads > Watson Assistant Chat.html > html > body > script > layout
 1  <html lang="en">
 2  <head>
 3  <style>
 4    .WebChatContainer {
 5      top: 0;
 6      bottom: 0;
 7    }
 8  </style>
 9  </head>
10 <body>
11
12 <div class="WebChatContainer">
13
14 <script>
15   const element = document.querySelector('.WebChatContainer');
16
17   window.watsonAssistantChatOptions = {
18     integrationID: "8b4ad299-e6b9-434c-8c8c-2754d9272fe5", // The ID of this integration.
19     region: "wxo-us-south", // The region your integration is hosted in.
20     serviceInstanceId: "c1e63381-8dcf-476b-bdf2-319f531087be", // The ID of your service instance.
21     element,
22
23     openChatByDefault: true,
24     hideCloseButton: true,
25
26     layout: {
27       showFrame: false,
28       hasContentMaxWidth: true,
29     },
30
31     onLoad: async (instance) => {
32       window.WACInstance = instance;
33       await instance.render();
34     }
35   }
36
37
38
39
40

```

8. Open the Watson Assistant Chat.html file in a web browser.



Your assistant is now live. Explore some of the earlier prompts to verify the assistant is accessing the ingested documents and your skills and skill flows are active.

⚠ Wait 5-10 seconds before clicking apply on skill actions.

Prompts to try:

What is z/OS continuous delivery?

Get z/OS facts

Show me z/OS facts

Gather and display z/OS facts

Adding other integrations

IBM watsonx Assistant for Z can integrate with other delivery channels beyond a web page. Other channels include Slack, Microsoft teams, WhatsApp, and many others. Integrating with these and other channels are not covered in the lab guide. However, follow the steps after this to find the current channels that are supported and where to get more information.

1. Hover over the Home () and click **Integrations**.

The screenshot shows the IBM watsonx Orchestrate interface. The left sidebar has a tree view with 'Home' selected under 'Build'. The main area displays a 'Build actions' card and a 'Zeeves' integration diagram. The 'Integrations' section in the sidebar is highlighted with a green border. The diagram shows the Zeeves integration structure with nodes like 'Default behavior', 'Actions', and 'Fallback' connected to various channels and agents.

2. Explore the **Essential channels** and **Channels** sections.

The screenshot shows the 'Integrations' section with 'Essential channels' highlighted. It includes a 'Web chat' card and a 'Channels' section with tiles for 'SMS', 'Facebook messenger', 'Genesys Bot Connector', 'Slack', 'Microsoft teams', and 'WhatsApp with Twilio'. A green dashed box highlights the 'Essential channels' and 'Channels' sections.

3. Click **Add** on the **Slack** tile.

Integrations
Add different channels and extensions to easily configure and deploy your assistant.

Essential channels
Add our most utilized methods of deploying assistants. These channels support additional customization and advanced integrations.

Web chat
Built by IBM Lite
Embed the web chat onto your company website so it can answer questions.
[Learn more](#)

Contact center integrations
NICE, Genesys, Twilio

Channels
Deploy your assistant to third-party channels to expand your reach.

SMS	Facebook messenger	Genesys Bot Connector	Slack	Microsoft teams	WhatsApp with Twilio
Add	Add	Add	Add	Add	Add

Extensions

4. Click Add.

Integrations
Add different channels and extensions to easily configure and deploy your assistant.

Web chat

Slack
Let your assistant respond directly in Slack. Add your assistant as a bot user to your Slack app, answering questions from direct messages or channels.

Add

Channels
Deploy your assistant to third-party channels to expand your reach.

SMS	Facebook messenger	Genesys Bot Connector	Slack	Microsoft teams	WhatsApp with Twilio
Add	Add	Add	Add	Add	Add

5. Review the step-by-step instructions and additional information available for adding a Slack integration.

Note: Most users will not have permissions to integrate with your enterprise slack deployment as doing so requires administrative rights.

Slack [Draft](#)

[Close](#) [Next](#)

Get started

Through Slack, your assistant is ready to join the collaboration hub that brings the right people, information, and tools together to get work done. [Learn more](#)

Steps to setting up Slack

1. Set up your Slack bot
2. Connect AI assistant builder to Slack
3. Configure your Slack bot
4. Connect your assistant

Take time to further explore the next steps for adding a Slack integration channel and the other supported integration channels.

Learn more about adding integrations [here](#).

Next steps

This lab guide covered many of the IBM watsonx Assistant for Z capabilities and provides a good base for conducting basic client pilots. However, there is still more to learn about IBM watsonx Assistant for Z. Updates and new releases of the offering and the underlying offerings like watsonx Orchestrate rollout on a regular basis. Be sure to stay informed by bookmarking and regularly reviewing the [offering landing page](#) and the [product documentation](#).

Earn the badge

Finally, remember to earn the {{ no such element: super_collections.SuperDict object['cname'] }} you must complete the IBM watsonx Assistant for Z for Technical Sales Level 4 learning plan.

IBM technical sellers: [Your Learning learning plan](#)

Business Partners [IBM Training learning plan](#)