

# Project Report

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**Title** : Intelligent Customer Help Desk  
With Smart Document Understanding

**Category:** Artificial Intelligence

**Internship at [smartinternz.com](https://smartinternz.com)**

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# INTRODUCTION

## Overview

We will be designing an application that leverages multiple Watson AIServices (Discovery, Assistant, Cloud function and Node Red). By the end of the project, we'll learn best practices of combining Watson services, and how they can be used to build interactive information retrieval systems with Discovery + Assistant.

- Project Requirements: Python, IBM Cloud, IBM Watson
- Functional Requirements: IBM cloud
- Technical Requirements: AI, ML, WATSON AI, PYTHON
- Software Requirements: Watson assistant, Watson discovery.
- Project Deliverables: Smartinternz Internship
- Project Team: Parth Patel
- Project Duration: 19 days

## Purpose

The typical customer care chatbot can answer simple questions, such as store locations and hours, directions, and maybe even making appointments. When a question falls outside of the scope of the predetermined question set, the option is typically to tell the customer the question isn't valid or offer to speak to a real person. The purpose of this project is to build a customer helping chatbot such that if the customer question is about the operation of a device, the application shall pass the question onto Watson Discovery Service, which has been pre-loaded with the device's owner's manual. So, instead of "Would you like to speak to a customer representative?" we can return relevant sections of the owner's manual to help solve our customers' problems.

## Scope of Work

- Create a customer care dialog skill in Watson Assistant
- Use Smart Document Understanding to build an enhanced Watson Discovery collection
- Create an IBM Cloud Functions web action that allows Watson Assistant to post queries to Watson Discovery
- Build a web application with integration to all these services & deploy the same on IBM Cloud Platform.

## LITERATURE SURVEY

### Existing problem

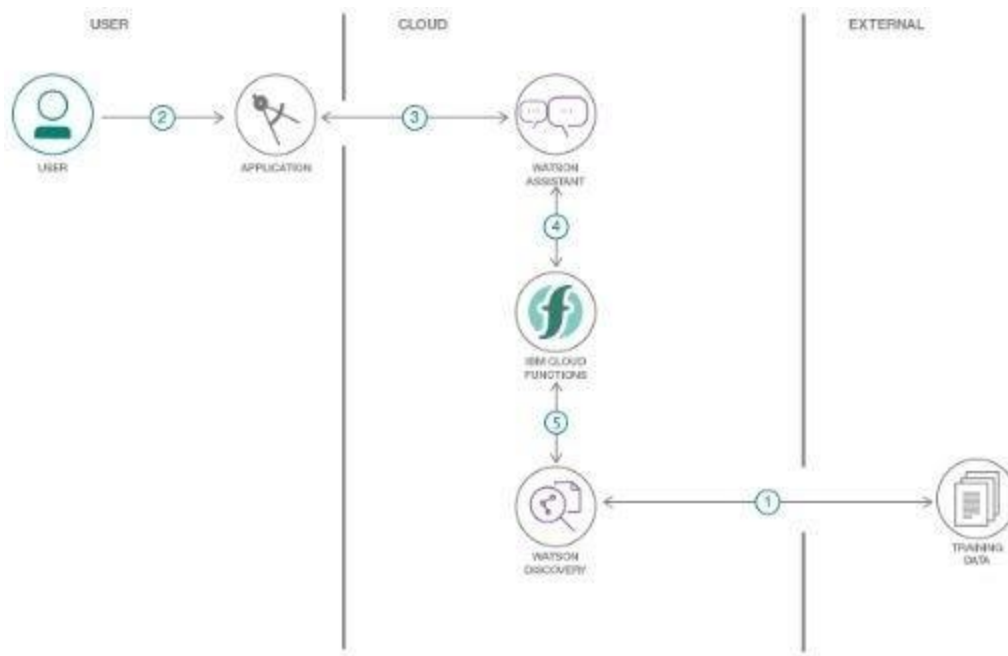
Generally chatbots means getting input from users and getting only response questions and for some questions the output from bot will be like “try again”, “I don’t understand”, “will you repeat again”, and so on... and directs customer to customer agent but a good customer Chatbot should minimize involvement of customer agent to chat with customer to clarify his/her doubts. So to achieve this we should include a virtual agent in chatbot so that it will take care of real involvement of the customer agent and the customer can clarify his doubts with fast chatbots.

### Proposed solution

For the above problem we are able to put a virtual agent in chatbot so it can understand the queries that are posted by customers. The virtual agent should train from some insight records based company background so it can answer queries supported by the merchandise or associated with the company. In other words, some styles of manual will be accustomed to train the bot using AI. Here I'm using Watson Discovery as a tool for implementing AI and getting trained by the owner's manual.

## THEORETICAL ANALYSIS

### Block/Flow Diagram



1. The document is annotated using Watson Discovery Smart Document Understanding
2. The user interacts with the backend server via the app UI. The frontend app UI is a chatbot that engages the user in a conversation.
3. Dialog between the user and backend server is coordinated using a Watson Assistant dialog skill.
4. If the user asks a product operation question, a search query is passed to a predefined IBM Cloud Functions action.
5. The Cloud Functions action will query the Watson Discovery service and return the results.

## Hardware / Software designing

1. Create IBM Cloud services
2. Configure Watson Discovery
3. Create IBM Cloud Functions action
4. Configure Watson Assistant
5. Create flow and configure node
6. Deploy and run Node Red app

## EXPERIMENTAL INVESTIGATIONS

### Create IBM Cloud services

Create the following services:

- Watson Discovery
- Watson Assistant
- IBM cloud function
- Node Red

### Configure Watson Discovery

Import the document

Launch the Watson Discovery tool and create a new data collection by selecting the Upload your own data option. Give the data collection a unique name. When prompted, select and upload the ecobee3\_UserGuide.pdf file located in the data directory of your local repo.

The Ecobee is a popular residential thermostat that has a wifi interface and multiple configuration options. Before applying SDU to our document, let's do some simple queries on the data so that we can compare it to results found after applying SDU.

The screenshot shows the IBM Watson Discovery Overview page for a project named 'ecobee'. The page has a dark header with the IBM Watson Discovery logo and navigation links like 'Cookie Preferences', 'Instance: Discovery-od', and a user icon. On the left, there's a sidebar with icons for Overview, Errors and warnings (1), and Search settings. The main content area shows '1 document' and '0 documents failed'. It lists 'Created on' and 'Last updated' as '6/6/2019 6:25:40 pm EDT'. There's an 'Upload documents' button. Below this, it says 'Identified 1 field from your data' with a 'text' field. A section 'Added 3 enrichments to your data' shows 'Sentiment Analysis' with 100% positive, 0% neutral, and 0% negative results, and 'Concept Tagging' with tags like 'Air conditioner', 'Energy recovery', and 'Geothermal heat pump'. A 'Category Classification' shows 'business and industr... energy'. On the right, it says 'Now you're ready to query!' with buttons to 'Run' queries for 'Air conditioner', 'Energy recovery', and 'Geothermal heat pump'. At the bottom, it says '6 enrichments available. Add enrichments'.

Click the Build your own query [1] button.

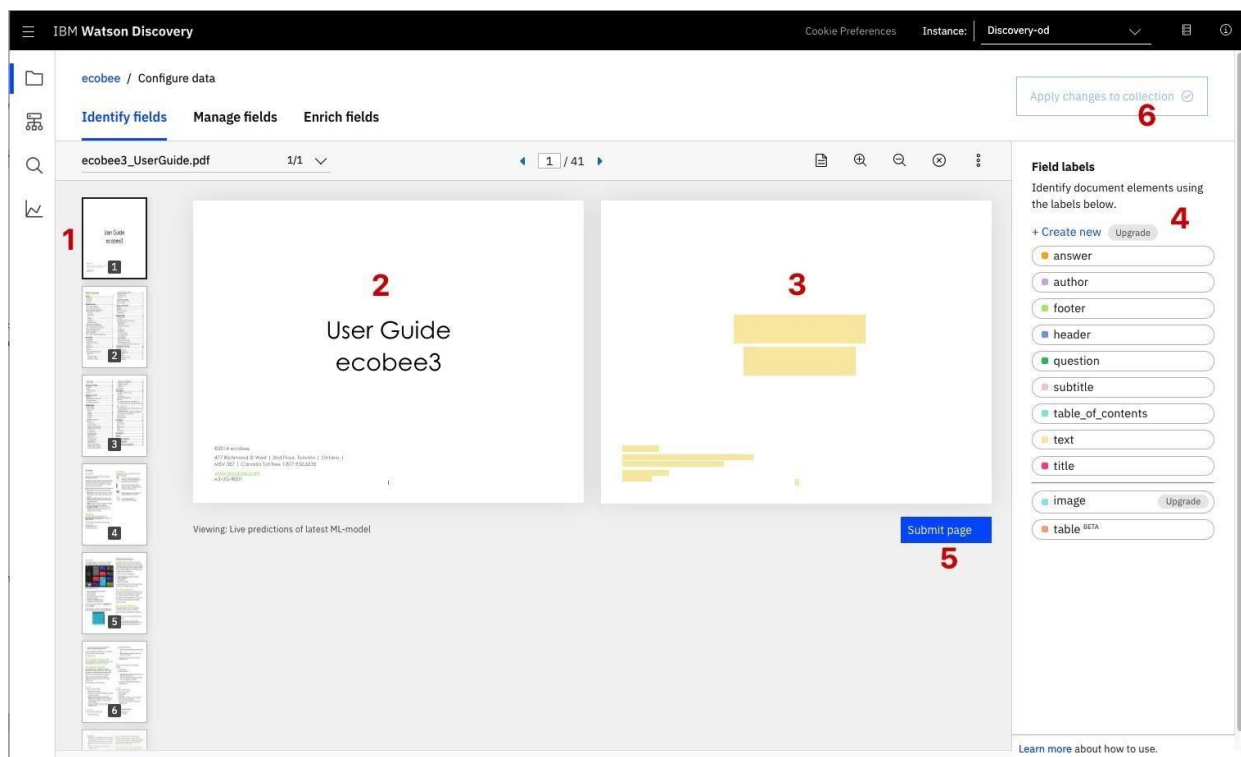
The screenshot shows the IBM Watson Discovery 'Build queries' page. The header is the same as the previous screenshot. The left sidebar has 'Build queries' selected. The main content area has a 'Build a query using one or more of these components. Learn more.' section with a 'Use a sample query' button. Below is a 'Search for documents' section with a text input containing 'how do I turn on the heater?'. There are two expandable sections: 'Include analysis of your results' and 'Filter which documents you query'. At the bottom, there are 'Run query' and 'Close' buttons. On the right, there's a 'Summary' panel showing the 'QUERY URL' as 'https://gateway.watsonplatform.net/discovery/api/v1/environ...'. It also shows 'Passages' with text from a document and 'Results' showing 'Showing 1 of 1 matching documents' with a result for 'ecobee3\_UserGuide.pdf' with a 'positive' sentiment.

Enter queries related to the operation of the thermostat and view the results. As you will see, the results are not very useful, and in some cases, not even related to the question.

## Annotate with SDU

Now let's apply SDU to our document to see if we can generate some better query responses. From the Discovery collection panel, click the Configure data button (located in the top right corner) to start the SDU process.

Here is the layout of the Identify fields tab of the SDU annotation panel:



The goal is to annotate all of the pages in the document so Discovery can learn what text is

important, and what text can be ignored.

[1] is the list of pages in the manual? As each is processed, a green check mark will appear

on the page.



[2] is the current page being annotated?

[3] is where you select text and assign it a label.

[4] is the list of labels you assign to the page text.

Click [5] to submit the page to Discovery.

Click [6] when you have completed the annotation process.

As you go through the annotations one page at a time, Discovery is learning and should start automatically updating the upcoming pages. Once you get to a page that is already correctly annotated, you can stop, or simply click Submit [5] to acknowledge it is correct. The more pages you annotate, the better the model will be trained.

For this specific owner's manual, at a minimum, it is suggested to mark the following:

The main title page as title

The table of contents (shown in the first few pages) as table\_of\_contents

All headers and sub-headers (typed in light green text) as a subtitle

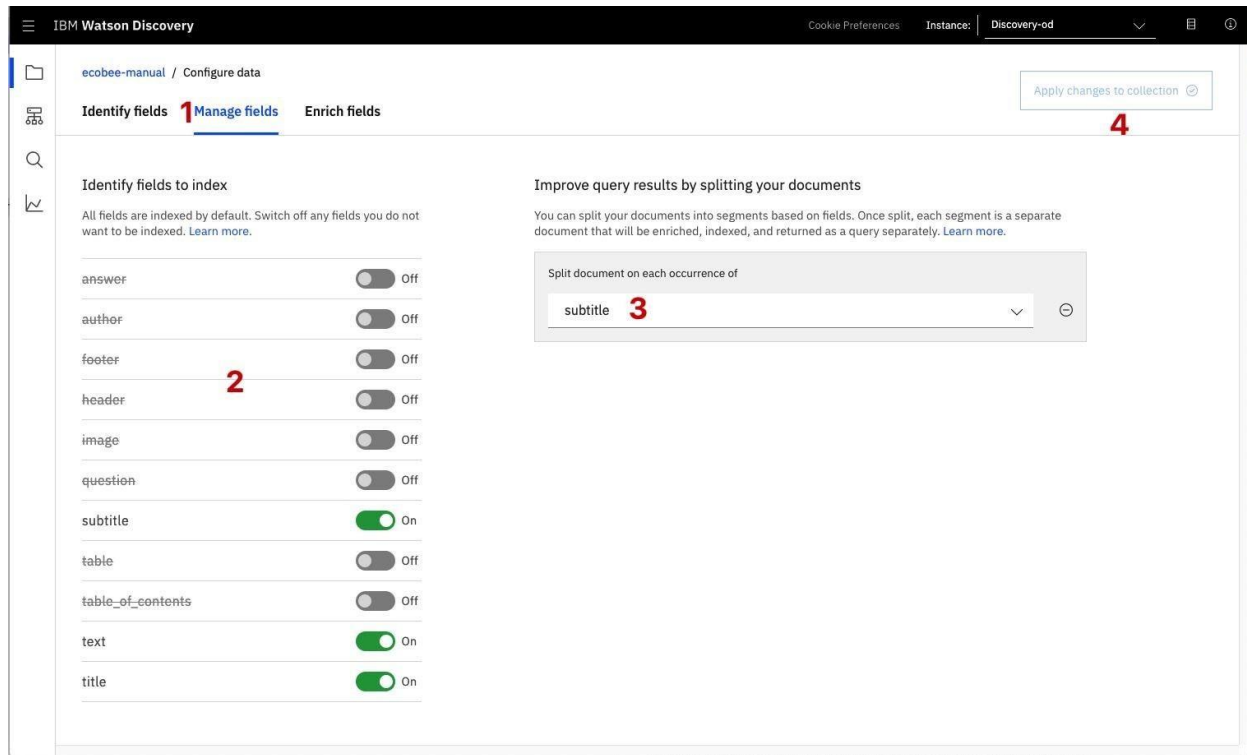
All page numbers as footers

All warranty and licensing information (located in the last few pages) as a footer

All other text should be marked as text.

Once you click the Apply changes to collection button [6], you will be asked to reload the document. Choose the same owner's manual .pdf document as before.

Next, click on the Manage fields [1] tab.



[2] Here is where you tell Discovery which fields to ignore. Using the on/off buttons, turn off all labels except subtitles and text.

[3] is telling Discovery to split the document apart, based on subtitles.

Click [4] to submit your changes.

Once again, you will be asked to reload the document.

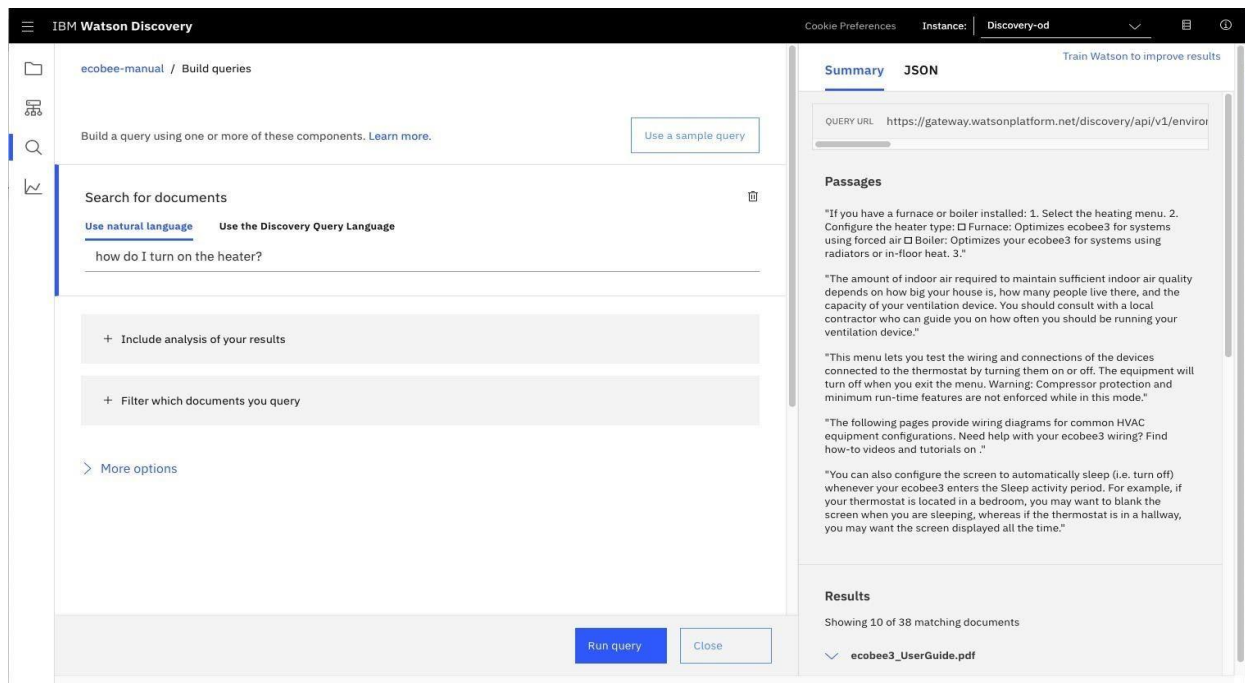
Now, as a result of splitting the document apart, your collection will look very different:

The screenshot displays the IBM Watson Discovery interface for a dataset named 'ecobee-manual'. The top navigation bar includes 'Cookie Preferences', 'Instance: Discovery-0d', and a user icon. The left sidebar contains icons for document management, search, and settings. The main content area is divided into several sections:

- Overview:** Shows 130 documents, 0 failed documents, and creation/last updated timestamps (3/28/2019 4:27:53 pm EDT). An 'Upload documents' button is present.
- Identified 5 fields from your data:** A list of fields: footer, subtitle, table\_of\_contents, text, and title. A link 'Need to identify more fields? Add fields' is provided.
- Added 4 enrichments to your data:**
  - Entity Extraction:** Displays extracted entities like '0.3°C (4)', '0.5°F (4)', '10 °F (4)', '900 seconds (4)', and '20 min (3)'.
  - Sentiment Analysis:** Shows sentiment distribution: 37% positive, 26% neutral, and 36% negative.
  - Concept Tagging:** Displays tags like 'Heat (1.7)', 'Internet (1.4)', 'HVAC (1.3)', 'Netscape (1.3)', and 'Temperature (1.3)'.
  - Category Classification:** Shows a category 'technology and com... operating systems'.
- Now you're ready to query!** Three query suggestions are provided:
  - 'Entities of type Quantity which have negative sentiment' with a 'Run' button.
  - 'Documents that contain Heat, but not Internet' with a 'Run' button.
  - 'Top entities with their average, min, max sentiment score' with a 'Run' button.

A link 'Build your own query →' is located at the bottom right of the query suggestions section.

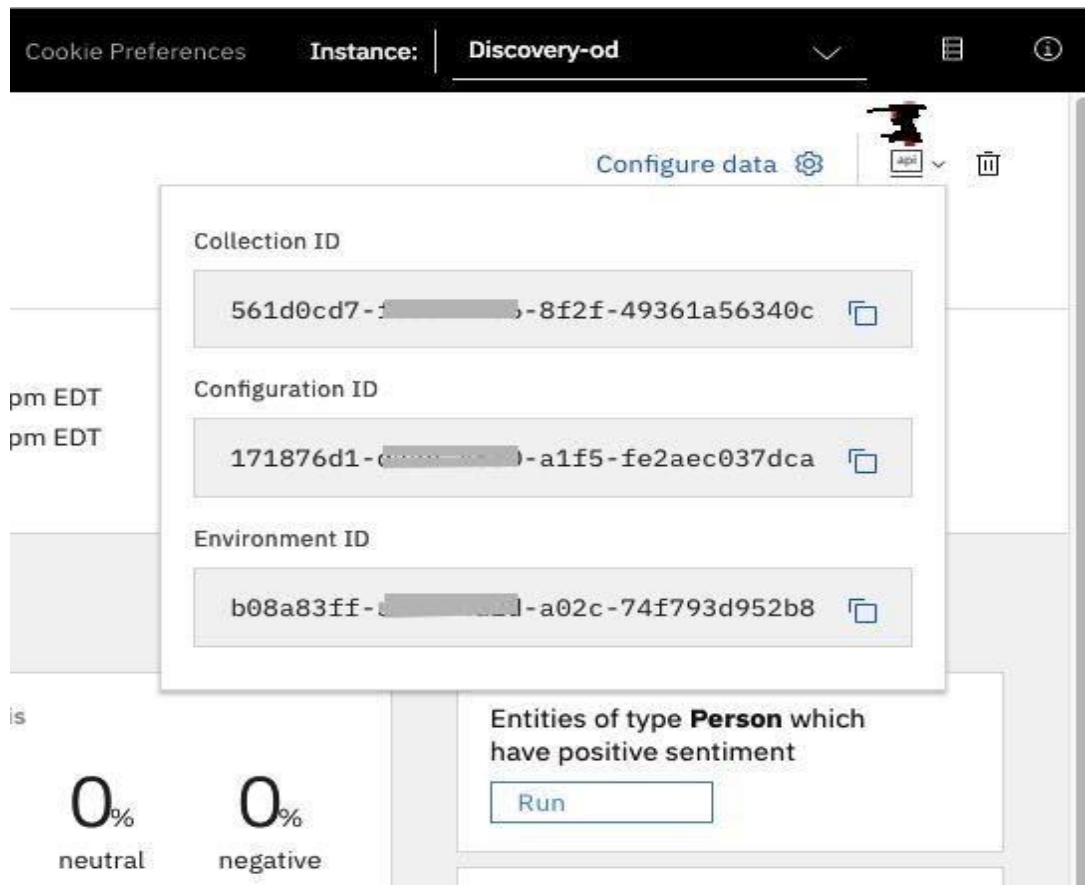
Return to the query panel (click Build your own query) and see how much better the results are.



## Store credentials for future use

In upcoming steps, you will need to provide the credentials to access your Discovery collection. The values can be found in the following locations.

The Collection ID and Environment ID values can be found by clicking the dropdown button [I] located at the top right side of your collection panel:



For credentials, return to the main panel of your Discovery service, and click the Service credentials [1] tab:

IBM Cloud

Search resources and offerings...

Resource list /

Discovery-od

Resource group: default Location: Dallas [Add Tags](#)

**Service credentials**

Credentials are provided in JSON format. The JSON snippet lists credentials, such as the API key and secret, as well as connection information for the service. [Learn more](#)

**Service credentials** [New credential](#)

Items per page: 10 | 1-1 of 1 items 1 of 1 pages

KEY NAME	DATE CREATED	ACTIONS
<input type="checkbox"/> Service credentials-1	FEB 5, 2019 - 09:26:31 AM	<a href="#">View credentials</a> <b>2</b>

```

3 {
  "apikey": "dryBf3aITnsy: [REDACTED] Ahiau8bkoAfu10",
  "iam_apikey_description": "Auto generated apikey during resource-key operation for Instance - crn:v1:bluemix:public:discovery:us-south:a/bc1bd51c396536dc7d5f81d5a4e19533:acf2871-3b0d-4e04-a0f9-8daa59770852::",
  "iam_apikey_name": "auto-generated-apikey-f5136cdd-d1d2-4a17-b41d-8ca5d1fic7a6",
  "iam_role_crn": "crn:v1:bluemix:public:iam:::serviceRole:Manager",
  "iam_serviceid_crn": "crn:v1:bluemix:public:iam-identity::a/bc1bd51c396536dc7d5f81d5a4e19533::serviceid:ServiceId-616b8efa-a050-4708-a191-0b71f43cbddb",
  4 "url": "https://gateway.watsonplatform.net/discovery/api"
}

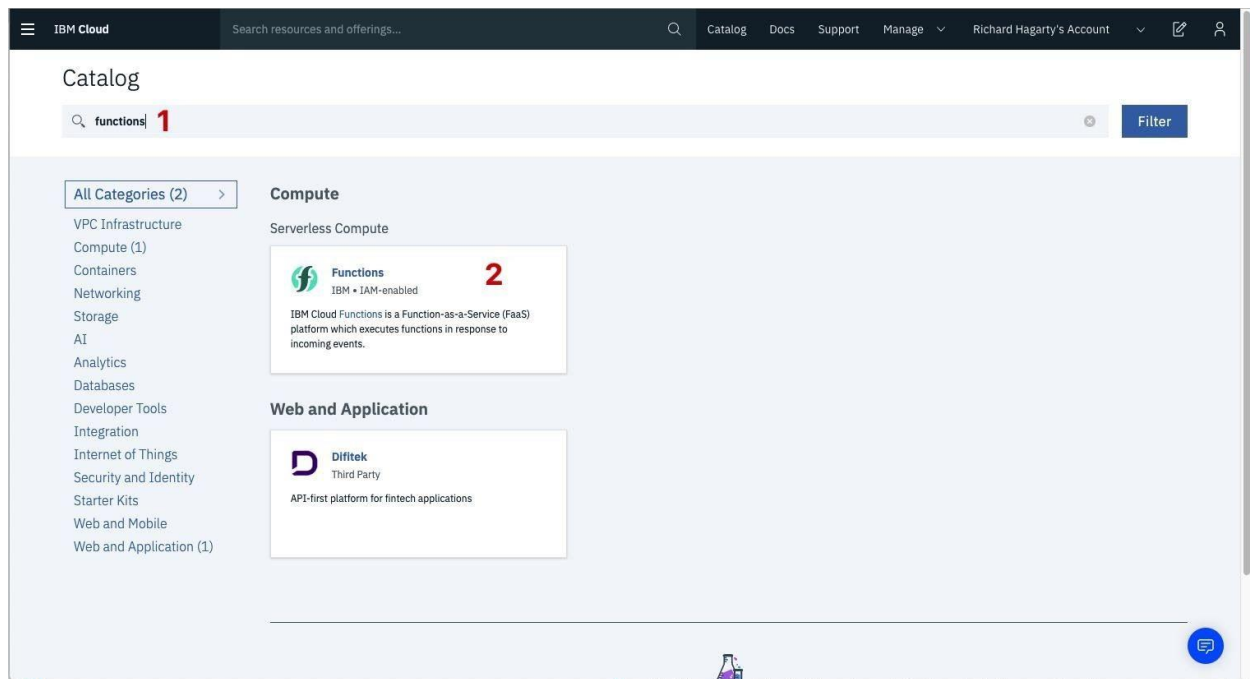
```

Click the View credentials **[2]** drop-down menu to view the IAM api key **[3]** and URL endpoint **[4]** for your service.

## Create IBM Cloud Functions action

Now let's create the web action that will make queries against our Discovery collection.

Start the IBM Cloud Functions service by selecting Create Resource from the IBM Cloud dashboard. Enter functions as the filter **[1]**, then select the Functions card **[2]**:



From the Functions main panel, click on the Actions tab. Then click on Create.

From the Create panel, select the Create Action option.

On the Create Action panel, provide a unique Action Name [1], keep the default package [2], and select the Node.js 10 [3] runtime. Click the Create button [4] to create the action.

IBM Cloud

Search resources and offerings...

Functions

Getting Started

Actions

Triggers

APIs

Monitor

Logs

Namespace Settings

## Create Action

Actions contain your function code and are invoked by events or REST API calls.

[Learn more about Actions](#)

[Learn more about Packages](#)

Action Name

disco-action-2

Enclosing Package

(Default Package)

Create Package

Runtime

Node.js 10

Looking for Java, .NET or Docker? [Docker](#) Actions can be created with the [CLI](#)

Cancel

Previous

Create

Once your action is created, click on the Code tab [1]:

disco-action Web Action

Code

Parameters

Runtime

Endpoints

Connected Triggers

Enclosing Sequences

Logs

Code

Node.js 10

Change Input

Invoke

```

1  /**
2   *
3   * @param {object} params
4   * @param {string} params.iam_apikey
5   * @param {string} params.url
6   * @param {string} params.username
7   * @param {string} params.password
8   * @param {string} params.environment_id
9   * @param {string} params.collection_id
10  * @param {string} params.configuration_id
11  * @param {string} params.input
12  *
13  * @return {object}
14  */
15
16
17  const assert = require('assert');
18  const DiscoveryV1 = require('watson-developer-cloud/discovery/v1');
19
20  /**
21   *
22   * main() will be run when you invoke this action
23   *
24   * @param Cloud Functions actions accept a single parameter, which must be a JSON object.
25   * @return The output of this action, which must be a JSON object.
26   */
27
28  /**
29   * function main(params) {
30   *   return new Promise(function (resolve, reject) {
31   *
32   *     let discovery;
33   *
34   *     if (params.iam_apikey){
35   *       discovery = new DiscoveryV1({
36   *         'iam_apikey': params.iam_apikey,
37   *

```

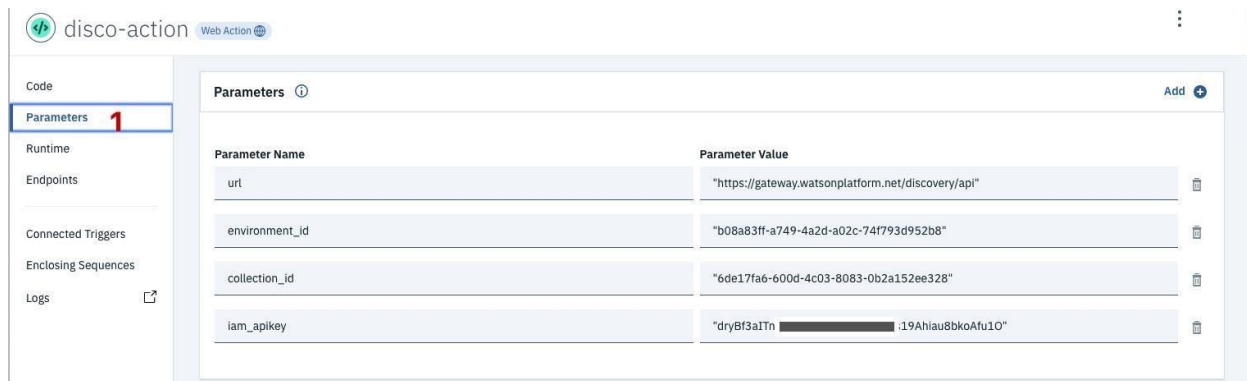
In the code editor window [2], cut and paste in the code from the disco-action.js file found in the actions directory of your local repo. The



code is pretty straight-forward - it simply connects to the Discovery service, makes a query against the collection, then returns the response.

If you press the Invoke button [3], it will fail due to credentials not being defined yet. We'll do this next.

Select the Parameters tab [1]:



Add the following keys:

- url
- environment\_id
- collection\_id
- iam\_apikey

For values, please use the values associated with the Discovery service you created in the previous step.

Now that the credentials are set, return to the Code panel and press the Invoke button again.

Now you should see actual results returned from the Discovery service:

The screenshot shows the IBM Cloud Functions console for the 'disco-action' in the 'IBM Cloud Storage\_DSX-journey-2' namespace. The 'Code' panel displays the JavaScript code for the action, which uses the 'watson-developer-cloud/discovery/v1' API. The 'Activations' panel shows a successful activation with an ID of 'e1bfc0ff21544c85bfc0ff21549c85a1' and results including matching results, passages, and enriched text.

**Code (Node.js 10)**

```
1 //**
2 *
3 * @param {object} params
4 * @param {string} params.iam_apikey
5 * @param {string} params.url
6 * @param {string} params.username
7 * @param {string} params.password
8 * @param {string} params.environment_id
9 * @param {string} params.collection_id
10 * @param {string} params.configuration_id
11 * @param {string} params.input
12 *
13 * @return {object}
14 *
15 */
16
17 const assert = require('assert');
18 const DiscoveryV1 = require('watson-developer-cloud/discovery/v1');
19
20 //**
21 *
22 * main() will be run when you invoke this action
23 *
24 * @param Cloud Functions actions accept a single parameter, which must be a JSON object.
25 *
26 * @return The output of this action, which must be a JSON object.
27 *
28 */
29 function main(params) {
30   return new Promise(function (resolve, reject) {
31
32     let discovery;
33
34     if (params.iam_apikey) {
35       discovery = new DiscoveryV1({
36         'iam_apikey': params.iam_apikey,
37         'url': params.url,
38         'version': '2019-03-25'
39       });
40     }
41
42     // ... (rest of the code)
43   });
44 }
```

**Activations**

disco-action 1050 ms 6/6/2019, 10:45:14

**Activation ID:**  
e1bfc0ff21544c85bfc0ff21549c85a1

**Results:**

```
{
  "matching_results": 14,
  "passages": [],
  "results": [
    {
      "enriched_text": {
        "categories": [
          {
            "label": "/technology and computing/operating systems",
            "score": 0.842265
          },
          {
            "label": "/technology and computing/hardware/computer",
            "score": 0.835879
          },
          {
            "label": "/technology and computing/hardware/computer peripherals/computer monitors",
            "score": 0.832254
          }
        ],
        "concepts": [
          {
            "dbpedia_resource": "http://dbpedia.org/resource/IPhone",
            "relevance": 0.917306,
            "text": "IPhone"
          },
          {
            "dbpedia_resource": "http://dbpedia.org/resource/Personal_digital_assistant",
            "relevance": 0.887088,
            "text": "Personal digital assistant"
          }
        ]
      }
    }
  ]
}
```

Next, go to the Endpoints panel [1]:

The screenshot shows the 'Endpoints' panel for the 'disco-action'. It displays the configuration for the action as a Web Action, including the HTTP method (ANY), authentication (Public), and the URL. It also shows the REST API configuration with the HTTP method (POST), authentication (API-KEY), and the URL. The CURL section provides the command to invoke the action.

**Web Action**

**2** ☒ **Enable as Web Action** Allow your Cloud Functions actions to handle HTTP events. Learn more about Web Actions.

☐ **Raw HTTP handling** When enabled your Action receives requests in plain text instead of a JSON body

HTTP METHOD	AUTH	URL
ANY	Public	<b>3</b> <a href="https://us-south.functions.cloud.ibm.com/api/v1/web/IBM%20Cloud%20Storage_DSX-journey-2/default/disco-action">https://us-south.functions.cloud.ibm.com/api/v1/web/IBM%20Cloud%20Storage_DSX-journey-2/default/disco-action</a>

**REST API**

HTTP METHOD	AUTH	URL
POST	API-KEY	<a href="https://us-south.functions.cloud.ibm.com/api/v1/namespaces/IBM%20Cloud%20Storage_DSX-journey-2/actions/disco-action">https://us-south.functions.cloud.ibm.com/api/v1/namespaces/IBM%20Cloud%20Storage_DSX-journey-2/actions/disco-action</a>

**CURL**

**4** `curl -u API-KEY -X POST https://us-south.functions.cloud.ibm.com/api/v1/namespaces/IBM%20Cloud%20Storage_DSX-journey-2/actions/disco-action?blocking=true`

Click the checkbox for Enable as Web Action [2]. This will generate a public endpoint URL [3].

Take note of the URL value [3], as this will be needed by Watson Assistant in a future step.

To verify you have entered the correct Discovery parameters, execute the provided curl command [4]. If it fails, re-check your parameter values.

## Configure Watson Assistant

As shown below, launch the Watson Assistant tool and create a new dialog skill. Select the Use sample skill option as your starting point.

This dialog skill contains all of the nodes needed to have a typical call center conversation with a user

### Add new intent

The default customer care dialog does not have a way to deal with any questions

involving outside resources, so we will need to add this.

Create a new intent that can detect when the user is asking about operating the Ecobee thermostat.

From the Customer Care Sample Skill panel, select the Intents tab.

Click the Create intent button.

Name the intent #Product\_Information, and at a minimum, enter the following example questions to be associated with it.

#Product\_Information

Last modified 2 hours ago

Try it

**Intent name**  
Name your intent to match a customer's question or goal. For example, #pay\_bill or #open\_account.

#Product\_Information

**Description (optional)**

User wants help using the thermostat

**Add user example**  
Type a user example here

Add example

Show recommendations

☐ User examples (3)

Added

0 conflicts

Show only conflicts

<input type="checkbox"/> How do I access the settings	2 hours ago
<input type="checkbox"/> How do I set the time	2 hours ago
<input type="checkbox"/> How do I turn on the heater	2 hours ago

## Create new dialog node

Now we need to add a node to handle our intent. Click on the Dialog [1] tab, then click on the drop down menu for the Small Talk node [2], and select the Add node below [3] option.

IBM Watson Assistant

Skills /

Customer Care Sample Skill copy  
Sample simple customer service skill to get you started.

Intents Entities **1 Dialog** Analytics Options Versions Content Catalog

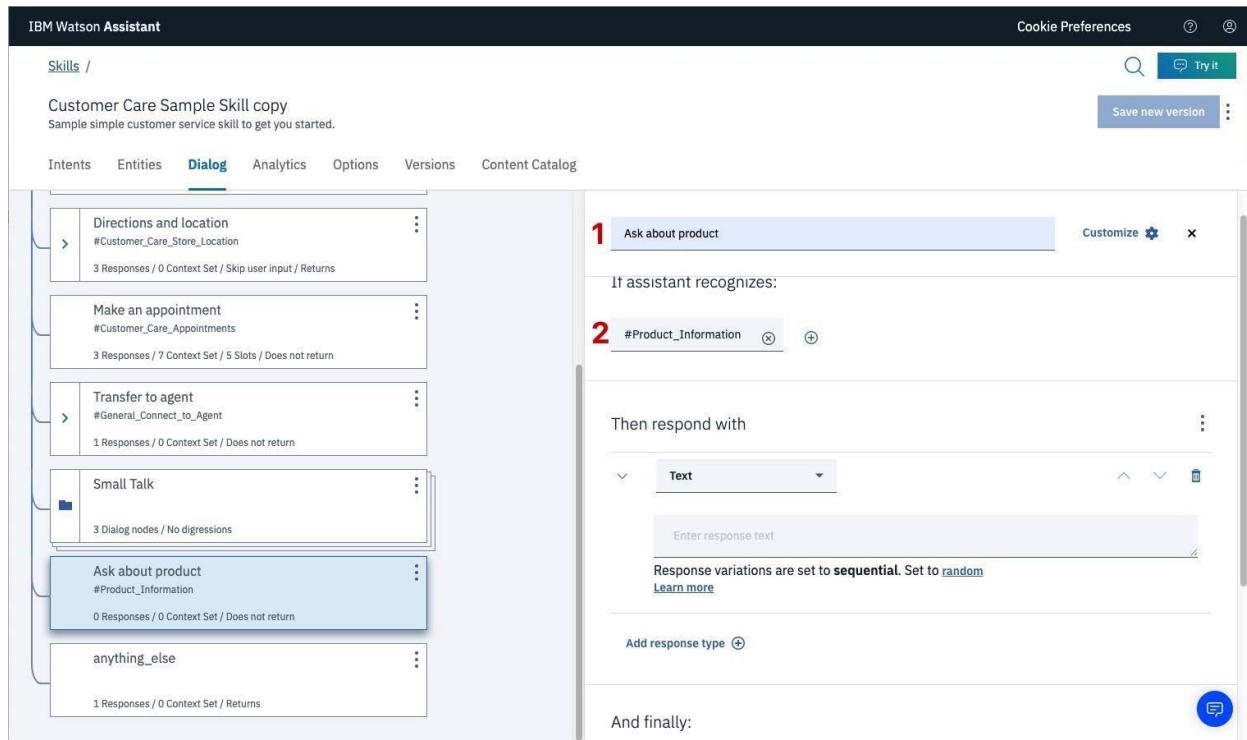
Dialog nodes:

- Directions and location  
#Customer\_Care\_Store\_Location  
3 Responses / 0 Context Set / Skip user input / Returns
- Make an appointment  
#Customer\_Care\_Appointments  
3 Responses / 7 Context Set / 5 Slots / Does not return
- Transfer to agent  
#General\_Connect\_to\_Agent  
1 Responses / 0 Context Set / Does not return
- Small Talk  
3 Dialog nodes / No digressions
- anything\_else  
1 Responses / 0 Context Set / Returns

Context menu options:

- Add node to folder
- Add node above
- Add node below **3**
- Add folder
- Move
- Duplicate
- Jump to
- Delete

Name the node "Ask about product" [1] and assign it our new intent [2].



This means that if Watson Assistant recognizes a user input such as "how do I set the time?", it will direct the conversation to this node.

## Enable webhook from Assistant

Set up access to our WebHook for the IBM Cloud Functions action you created in Step#4.

Select the Options tab [1]:

IBM Watson Assistant

Skills / Customer Care Sample Skill for Disco  
Sample simple customer service skill to get you started.

Intents Entities Dialog Analytics **Options** Versions Content Catalog

**Webhooks**

Autocorrection  
System Entities

**Webhooks**

A webhook is a mechanism that allows your dialog skill to call an external API when specific dialog nodes are triggered. Specify the request URL for the external API you want to be able to invoke. You will then be able to access this URL from within the dialog editor.  
[Learn more](#)

**URL**

**2** `https://us-south.functions.cloud.ibm.com/api/v1/web/IBM%20Cloud%20Stor`

**Headers**

Add HTTP headers for authorization or any other parameters required for invoking the specified request URL.

HEADER NAME	HEADER VALUE
Add header (+) Add authorization (+)	

**Next step**

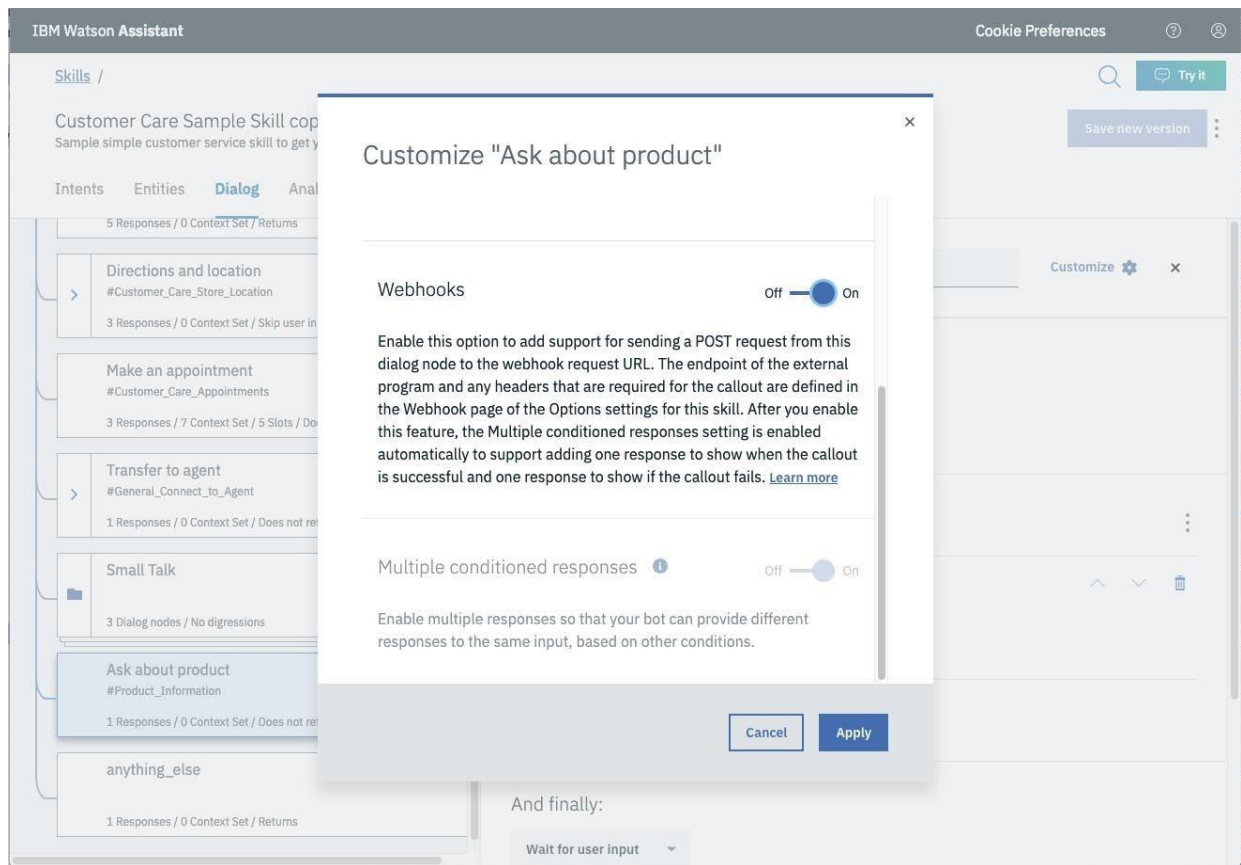
To trigger this webhook from an individual dialog node, enable the webhook from the Customize page in node details. [Go to dialog](#).

Enter the public URL endpoint for your action [2].

Important: Add .json to the end of the URL to specify the result should be in JSON format.

Return to the Dialog tab, and click on the Ask about product node. From the details

panel for the node, click on Customize, and enable Webhooks for this node:



Click Apply.

The dialog node should have a Return variable [1] set automatically to `$webhook_result_1`. This is the variable name you can use to access the result from the Discovery service query.



The screenshot shows the IBM Watson Assistant interface. The top navigation bar includes 'Skills /', 'Cookie Preferences', and a 'Try it' button. The main header displays the skill name 'Customer Care Sample Skill for Disco' and a 'Save new version' button. Below the header, there are tabs for 'Intents', 'Entities', 'Dialog', 'Analytics', 'Options', 'Versions', and 'Content Catalog'. The 'Dialog' tab is selected, showing a list of intents on the left and a configuration panel on the right.

The list of intents on the left includes:

- #Customer\_Care\_Store\_Hours (5 Responses / 0 Context Set / Returns)
- Directions and location (#Customer\_Care\_Store\_Location, 3 Responses / 0 Context Set / Skip user input / Returns)
- Make an appointment (#Customer\_Care\_Appointments, 3 Responses / 7 Context Set / 5 Slots / Does not return)
- Transfer to agent (#General\_Connect\_to\_Agent, 1 Responses / 0 Context Set / Does not return)
- Small Talk (3 Dialog nodes / No digressions)
- Ask about product (#Product\_Information, 2 Responses / 0 Context Set / Does not return)
- anything\_else (1 Responses / 0 Context Set / Returns)

The configuration panel on the right shows the configuration for the 'Ask about product' intent. It includes a 'Customize' button and a 'Try it' button. The configuration is divided into two sections: 'If assistant recognizes:' and 'Then callout to my webhook:'. The 'If assistant recognizes:' section shows the intent '#Product\_Information'. The 'Then callout to my webhook:' section shows a 'Parameters' table with the following data:

KEY	VALUE
2 input	"<?input.text?>"

Below the parameters table, there is an 'Add parameter' button and a 'Return variable' section with the following data:

Return variable
1 \$webhook_result_1

The 'Then respond with' section is partially visible at the bottom of the configuration panel.

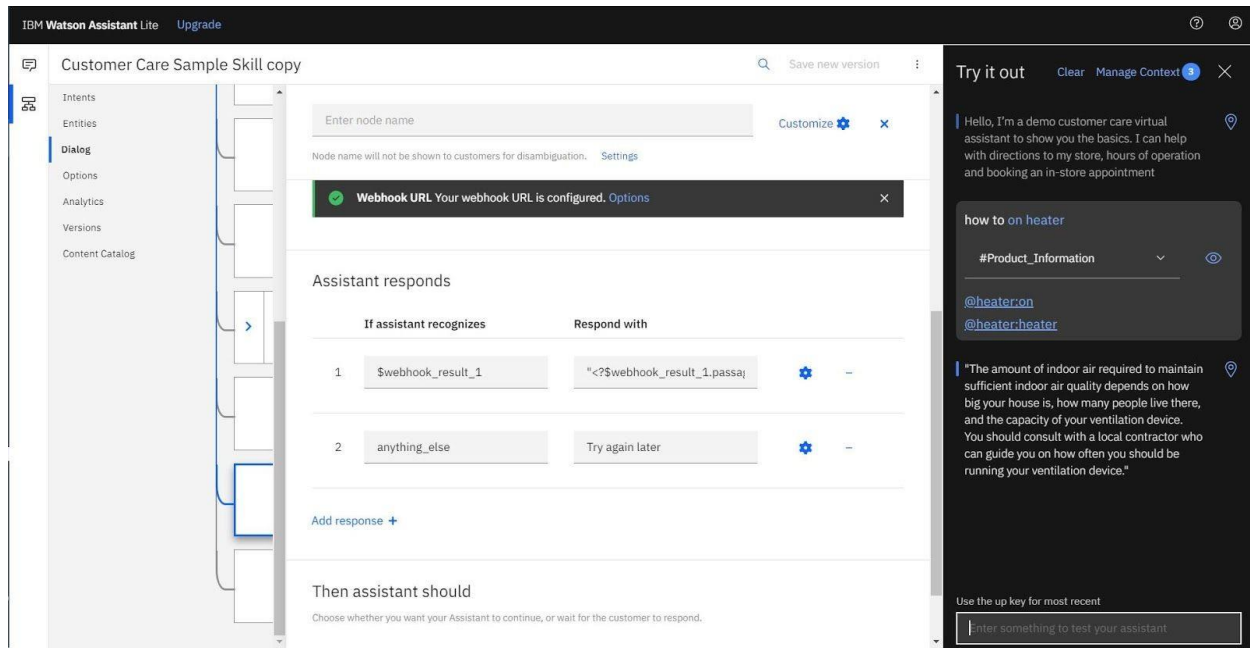
You will also need to pass in the users question via the parameter input [2]. The key needs to be set to the value:

"<?input.text?>"

If you fail to do this, Discovery will return results based on a blank query.

Optionally, you can add these responses to aid in debugging:

Add Add "<?webhook\_result\_1.passages[0].passage\_text?>" in response within the Assistant responds block as shown below.

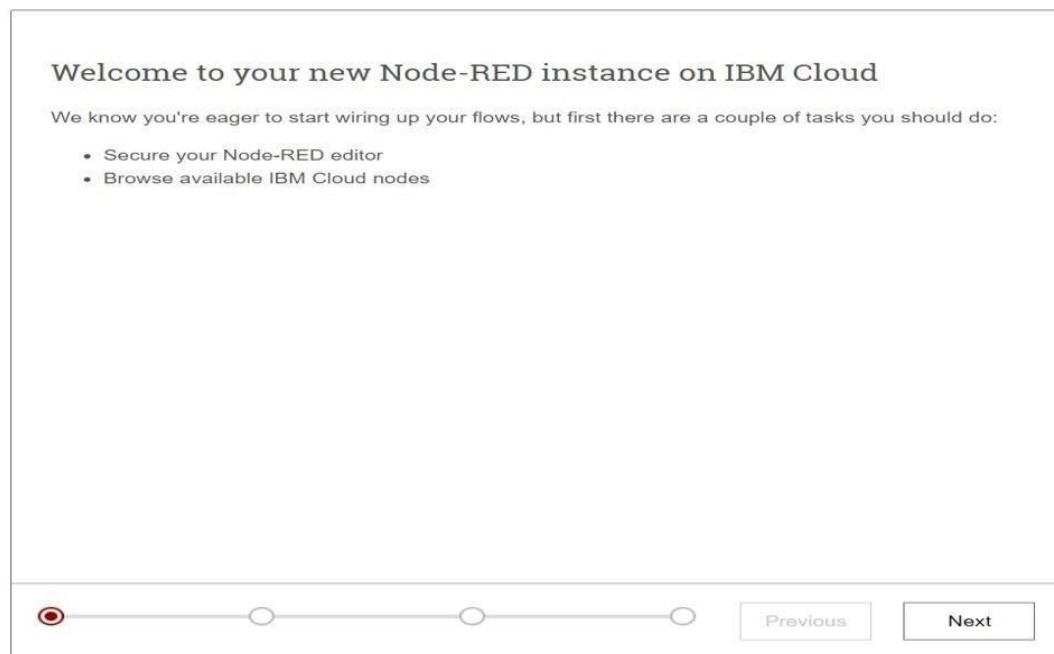


## Creation of Node-RED in IBM cloud

- Step-1: Login to IBM and go to the catalog
- Step-2: Search for node-red and select “Node-RED Starter “ Service
- Step-3: Enter the Unique name and click on create a button

Note: Your Node-red service is starting

- Step – 5: We have to configure Node red for the first time. Click on next to continue



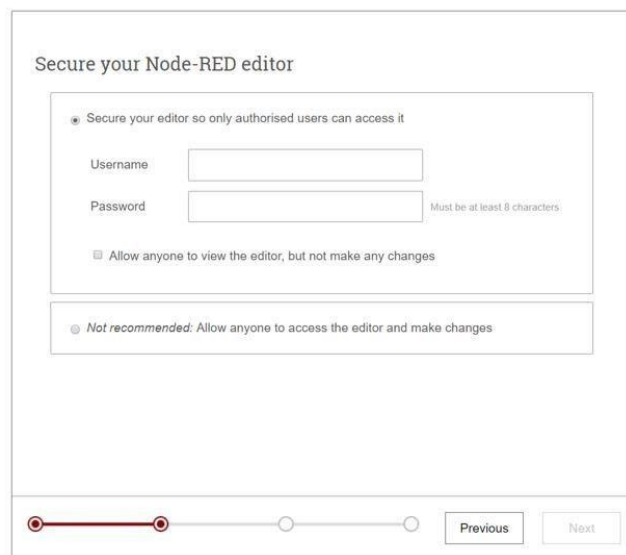
Welcome to your new Node-RED instance on IBM Cloud

We know you're eager to start wiring up your flows, but first there are a couple of tasks you should do:

- Secure your Node-RED editor
- Browse available IBM Cloud nodes

Progress bar: 1 of 4 steps completed. Buttons: Previous, Next.

- Step – 6: Secure your node red editor by giving a username and password and click on Next



Secure your Node-RED editor

☒ Secure your editor so only authorised users can access it

Username

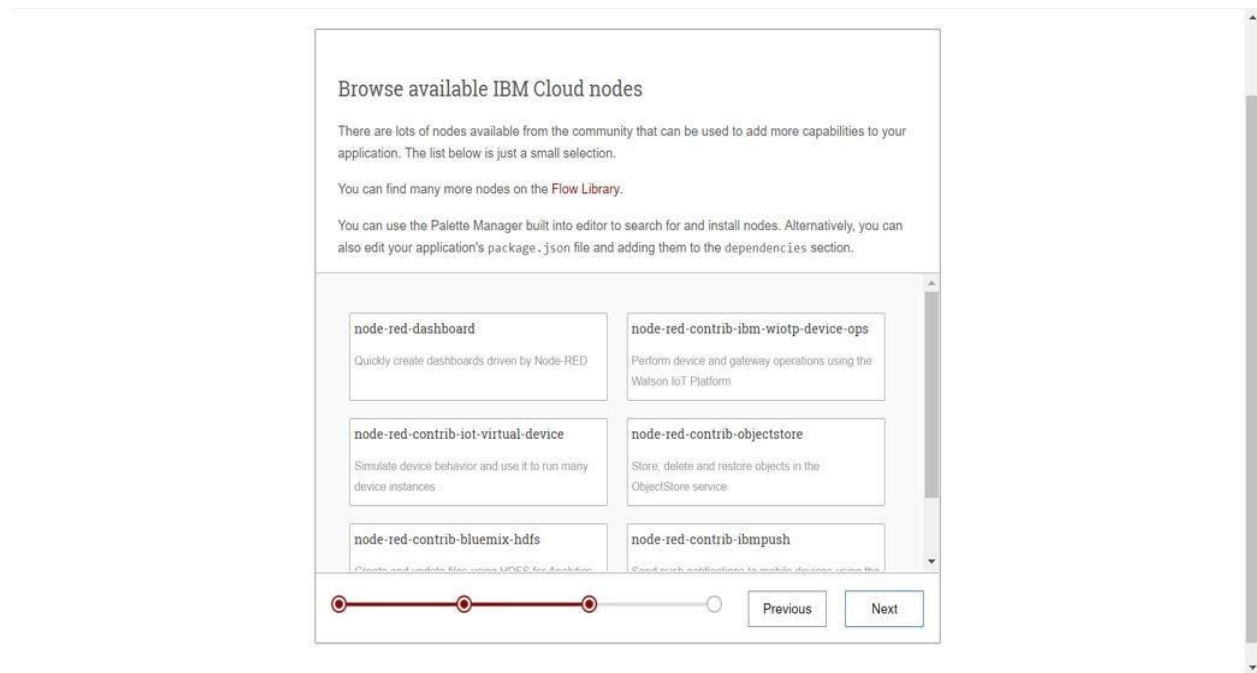
Password  Must be at least 8 characters.

☐ Allow anyone to view the editor, but not make any changes

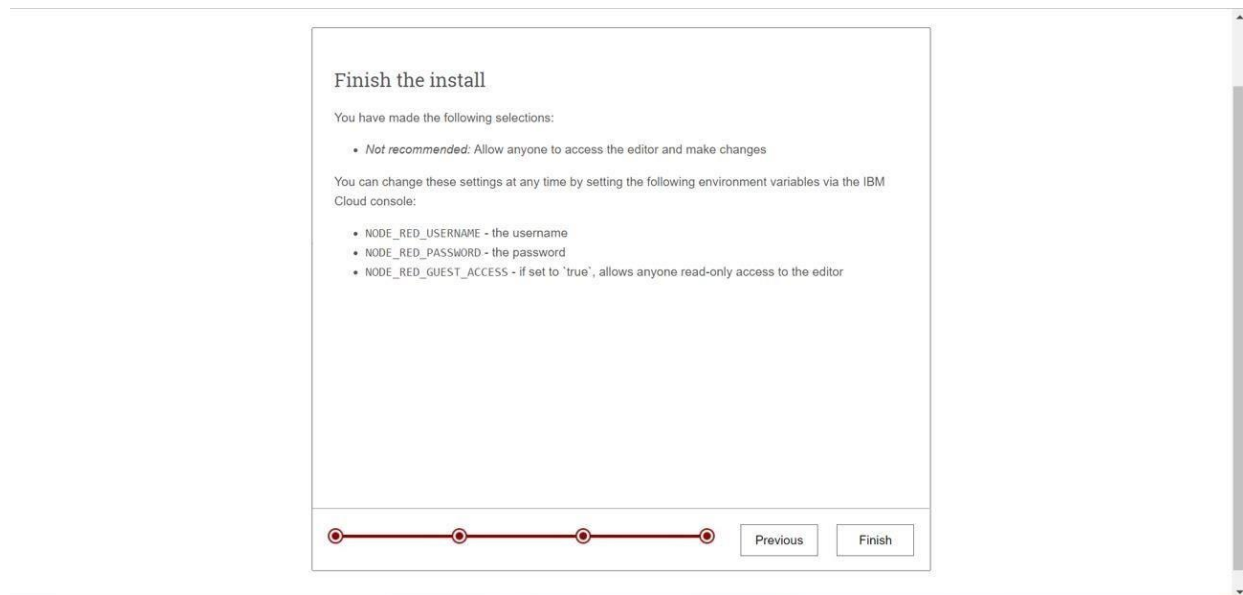
☐ *Not recommended:* Allow anyone to access the editor and make changes

Progress bar: 2 of 4 steps completed. Buttons: Previous, Next.

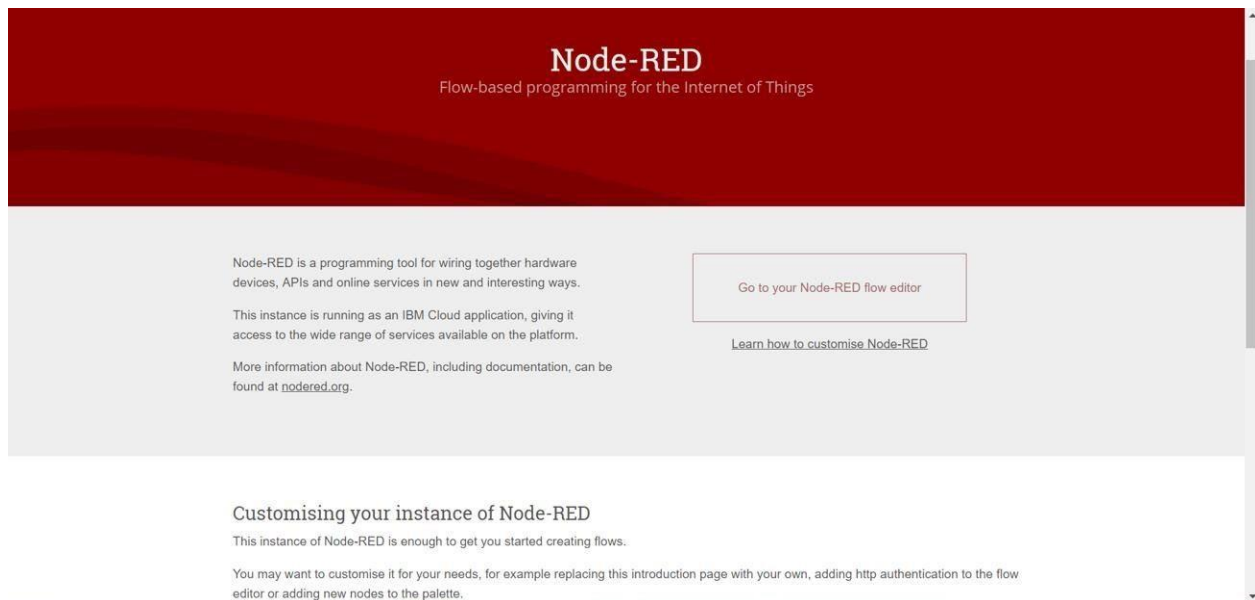
- Step – 7: Click Next to continue



### ➤ Step – 8: Click Finish



### ➤ Step – 9: Click on Go to Node-Red flow editor to launch the flow editor



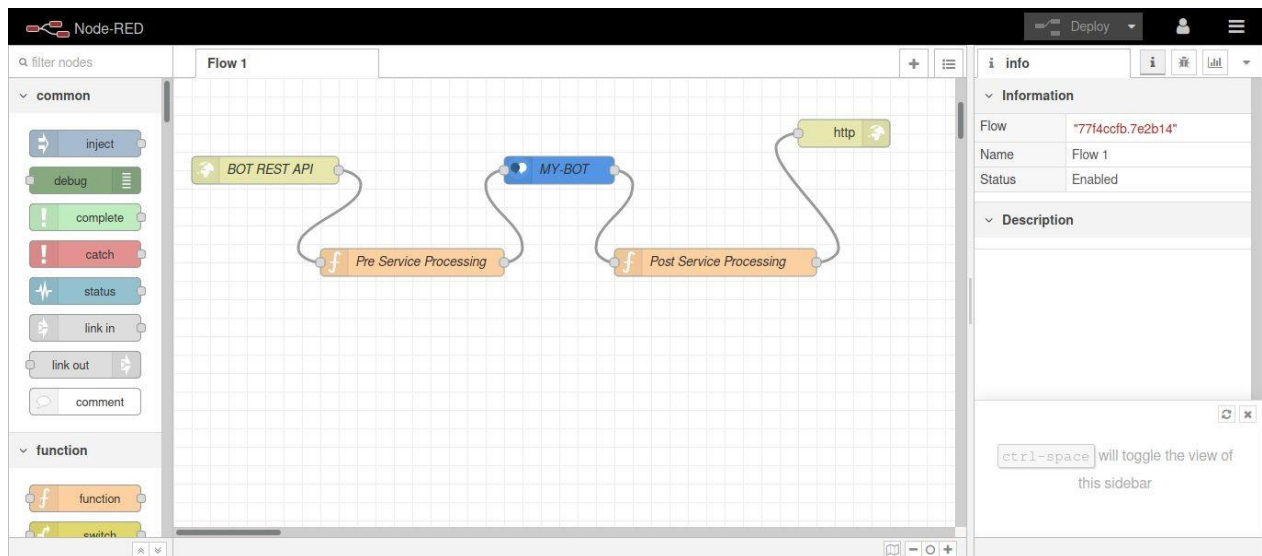
➤ Node red editor has various nodes with the respective functionality



## Integration of watson assistant in Node-RED

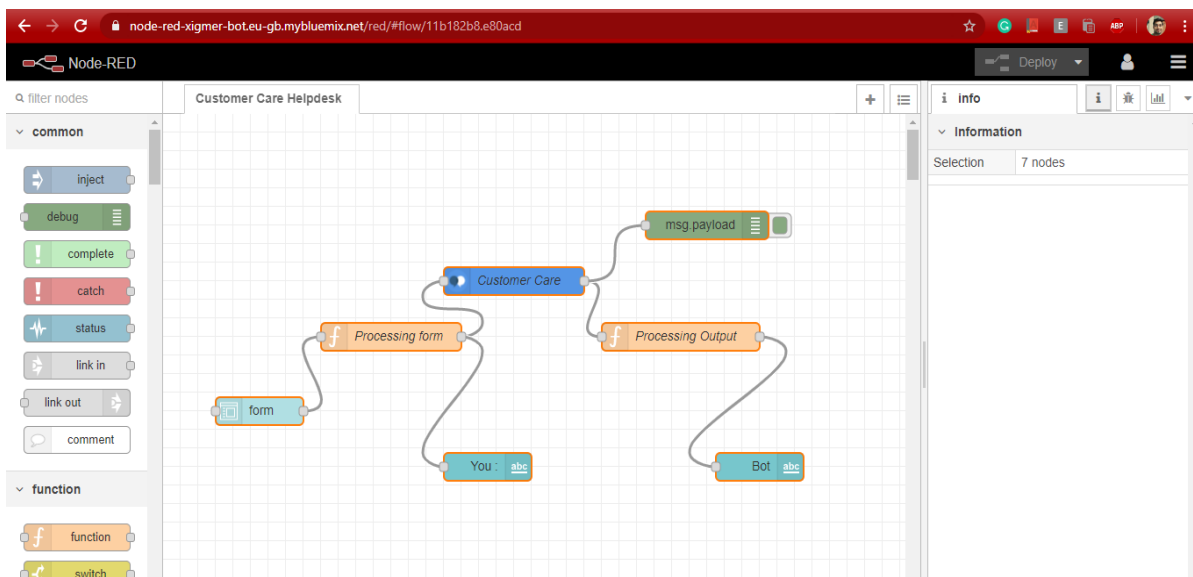
➤ Double-click on the Watson assistant node

- Give a name to your node and enter the username, password and workspace id of your Watson assistant service
- After entering all the information click on Done
- Drag a http-in node, http-response node into the workspace
- Drag two functions node, configure those to perform the pre and post processing of the input and output of the watson assistant node
- Connect the http-in, preprocessing, watson assistant, post processing and http-response nodes to form an API
- Connect the nodes as shown below and click on Deploy
- Drag the function node to parse the JSON data and get the bot response
- Connect the nodes as shown below and click on Deploy



We are done integrating Watson assistant service to Node-red. In the next lab, we will create a web application using Node-red for the chatbot. For creating a web application UI we need “dashboard” nodes which should be installed manually.

- Go to navigation pane and click on manage palette
- Click on install
- Search for “node-red-dashboard” and click on install and again click on install on the prompt
- The following message indicates dashboard nodes are installed, close the manage palette
- Drag a http-in, template and http-response node
- Make a request to the API and display the response in the web dashboard in the template node
- Connect those nodes



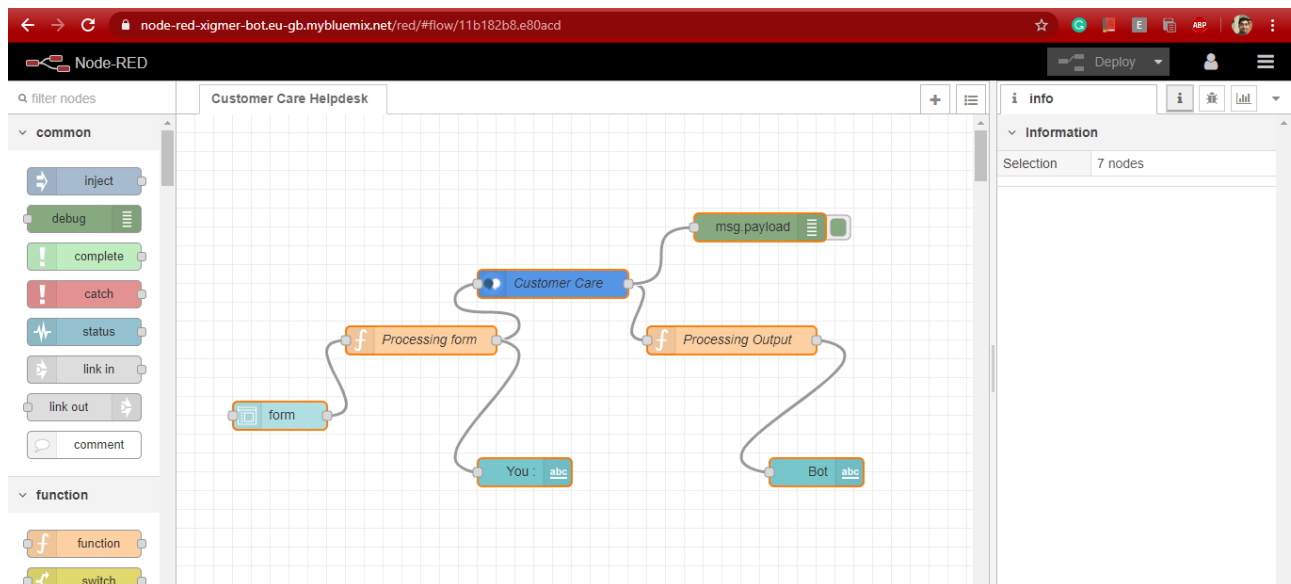
- Click on Deploy

## FLOWCHART

I. Create flow and configure node:

First go to manage the palette and install the dashboard. Now, create the flow with the help of following node:

- Assistant
- Function
- Debug
- Text
- Function
- Template



## RESULTS

Finally our Node-RED dashboard integrates all the components and displayed in the Dashboard UI -



CUSTOMER CARE HELPDESK

CHATBOT

ENTER YOUR DOUBTS  
HOW TO INSTALL HEATER

SUBMIT CANCEL

You : HOW TO INSTALL HEATER

BOT

"TO PREVENT ACCIDENTAL MODIFICATIONS TO THE INSTALLATION SETTINGS, YOU CAN ENABLE A 4-DIGIT INSTALLER CODE. THIS CODE IS PREPROGRAMMED TO 3262. ON THERMOSTAT: 1. SELECT MAIN MENU > SETTINGS > INSTALLATION SETTINGS > THRESHOLDS > INSTALLER CODE. 2. ENABLE OR DISABLE THE CODE."

CUSTOMER CARE HELPDESK

CHATBOT

ENTER YOUR DOUBTS  
WHAT ARE THE OPENING HOURS

SUBMIT CANCEL

You : WHAT ARE THE OPENING HOURS

BOT

OUR HOURS ARE MONDAY TO FRIDAY 10AM TO 8PM AND FRIDAY AND SATURDAY 11 AM TO 6PM.

## ADVANTAGES & DISADVANTAGES

### Advantages:

- Companies can deploy chatbots to rectify simple and general human queries .

- Reduces man power
- Cost efficient
- No need to divert calls to customer agents and customer agents can look at other works.

### Disadvantages:

- Some times chatbot can mislead customers
- Giving the same answer for different sentiments.
- Sometimes cannot connect to customer sentiments and intentions

## APPLICATIONS

- It can deploy in popular social media applications like facebook,slack,telegram.
- Chatbot can deploy any website to clarify basic doubts of viewer

## CONCLUSION

By doing the above procedure and all we successfully created an Intelligent help desk smart chatbot using Watson assistant, Watson discovery, Node-RED and cloud-functions.

## FUTURE SCOPE

We can include watson studio text to speech and speech to text services to access the chatbot handsfree. This is one of the future scope of this project.

## BIBLIOGRAPHY

## APPENDIX

### NODE-RED FLOW

```
[{"id":"11b182b8.e80acd","type":"tab","label":"Customer Care Hel
pdesk","disabled":false,"info":""},{id":"ef833f2a.47fbc","type"
:"ui_form","z":"11b182b8.e80acd","name":"","label":"","group":"4
3177b96.68f8d4","order":1,"width":0,"height":0,"options":[{"labe
l":"Enter Your Doubts","value":"text","type":"text","required":t
rue,"rows":null}], "formValue":{"text":""},"payload":"","submit":
"submit","cancel":"cancel","topic":"","x":110,"y":260,"wires":[[
"99302f4.0c955d"]]}, {"id":"99302f4.0c955d","type":"function","z"
:"11b182b8.e80acd","name":"","func":"msg.payload = msg.payload.t
ext;\nreturn msg;","outputs":1,"noerr":0,"x":230,"y":180,"wires"
:[["2a47b2b2.839b2e","2c9b9387.3d1edc"]]}, {"id":"7b027860.8833a8
","type":"function","z":"11b182b8.e80acd","name":"","func":"msg.
payload = msg.payload.output.text[0];\nreturn msg;","outputs":1,
"noerr":0,"x":550,"y":180,"wires":[["b604915c.053e1"]]}, {"id":"2
a47b2b2.839b2e","type":"watson-conversation-
v1","z":"11b182b8.e80acd","name":"Customer Care","workspaceid":"
d60d94fc-591c-422e-b5e1-
6090098a76e7","multiuser":false,"context":true,"empty-
payload":false,"service-endpoint":"","timeout":"","optout-
learning":false,"x":400,"y":120,"wires":[["7b027860.8833a8","bdc
1c22c.4db29"]]}, {"id":"2c9b9387.3d1edc","type":"ui_text","z":"11
b182b8.e80acd","group":"43177b96.68f8d4","order":2,"width":0,"he
ight":0,"name":"","label":"You :","format":"{{msg.payload}}","la
yout":"row-
left","x":370,"y":320,"wires":[]}, {"id":"bdc1c22c.4db29","type":
"debug","z":"11b182b8.e80acd","name":"","active":true,"tosidebar
":true,"console":false,"tostatus":false,"complete":"false","x":6
20,"y":60,"wires":[]}, {"id":"b604915c.053e1","type":"ui_text","z
":"11b182b8.e80acd","group":"43177b96.68f8d4","order":3,"width":
0,"height":0,"name":"","label":"Bot","format":"{{msg.payload}}",
```

```
"layout": "col-  
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e": "ui_group", "z": "", "name": "Chatbot", "tab": "e4e6162b.432e28", "o  
rder": 1, "disp": true, "width": 16, "collapse": false}, {"id": "e4e6162b  
.432e28", "type": "ui_tab", "z": "", "name": "Customer Care Helpdesk",  
"icon": "dashboard", "disabled": false, "hidden": false}]
```

## Cloud function Node.js I0 code for discovery integration webhook generation:

```
/*  
  
*  
  
* @param {object} params  
  
* @param {string} params.iam_apikey  
  
* @param {string} params.url  
  
* @param {string} params.username  
  
* @param {string} params.password  
  
* @param {string} params.environment_id  
  
* @param {string} params.collection_id  
  
* @param {string} params.configuration_id  
  
* @param {string} params.input
```

```
*  
  
* @return {object}  
  
*  
  
*/  
  
const assert = require('assert');  
  
const DiscoveryV1 = require('watson-developer-cloud/discovery/v1');  
  
/**  
  
*  
  
* main() will be run when you invoke this action  
  
*  
  
* @param Cloud Functions actions accept a single parameter, which must be a JSON object.  
  
*  
  
* @return The output of this action, which must be a JSON object.  
  
*  
  
*/  
  
function main(params) {  
  
  return new Promise(function (resolve, reject) {  
  
    let discovery;
```

```
if (params.iam_apikey){  
  
  discovery = new DiscoveryV1({  
  
    'iam_apikey': params.iam_apikey,  
  
    'url': params.url,  
  
    'version': '2019-03-25'  
  
  });  
  
}  
  
else {  
  
  discovery = new DiscoveryV1({  
  
    'username': params.username,  
  
    'password': params.password,  
  
    'url': params.url,  
  
    'version': '2019-03-25'  
  
  });  
  
}  
  
  
discovery.query({  
  
  'environment_id': params.environment_id,  
  
  'collection_id': params.collection_id,  
  
  'natural_language_query': params.input,  
  
  'passages': true,  
  
  'count': 3,
```

```
    'passages_count': 3
  }, function(err, data) {
    if (err) {
      return reject(err);
    }
    return resolve(data);
  });
});
}
```