Project Report on
Intelligent Customer Helpdesk with Smart Document Understandin in Artificial Intelligence

by

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1. Introduction

Overview

We will build a chatbot that uses various Watson AI Services (Watson Discovery, Watson Assistant, Watson Cloud Functions and Node-Red) to deliver an effective Web based UI through which we can chat with the assistant.
We will integrate the Watson Discovery service with Watson Assistant using webhooks.

1. Project Requirements : Node-RED , IBMCloud , IBMWatson , NodeJS

2. Functional Requirements : IBMCloud

3. Technical Requirements : AI , ML , WatsonAI , NodeJS

4. Software Requirements : Watson Assistant, Watson Discovery, Watson Cloud Functions, Node-RED

5. Project Deliverables : Intelligent Chatbot with Smart Document Understanding

6. Project Team : Rushikesh Jare

Objective:

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 pre-determined question set, the option is typically to tell the customer the question isn't valid or offer to speak to a real person.
In this project, there will be another option. 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 owners manual. So now, instead of "Would you like to speak to a customer representative?" we can return relevant sections of the owners manual to help solve our customers' problems. So unless and until customer specifically asks for a customer representative the bot will try to solve all your queries.

To take it a step further, the project shall use the Smart Document Understanding feature of Watson Discovery to train it on what text in the owners manual is important and what is not. This will improve the answers returned from the queries. Then using Watson actions as webhook ,Watson Discovery can be integrated with Watson assistant. Finally using Node-Red, Watson assistant can be integrated with a web UI.This UI can then be used to connect with Watson assistant and chat with it.

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.

2. Literature Survey

Existing Problem

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 pre-determined question set, the option is typically to tell the customer the question isn't valid or offer to speak to a real person.

Proposed Solution

In this project, there will be another option. 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 owners manual. So now, instead of "Would you like to speak to a customer representative?" we can return relevant sections of the owners manual to help solve our customers' problems. So unless and untill customer specifically asks for a customer representative the bot will try to solve all yourqueries.

To take it a step further, the project shall use the Smart Document Understanding feature of Watson Discovery to train it on what text in the owners manual is important and what is not. This will improve the answers returned from the queries. Then using Watson actions as webhook,Watson Discovery can be integrated with Watson assistant.Finally using Node-Red, Watson assistant can be integrated with a webUI.This UI can then be used to connect with Watson assistant and chat with it.

# 3. Theoretical Analysis

Block / Flow Diagram
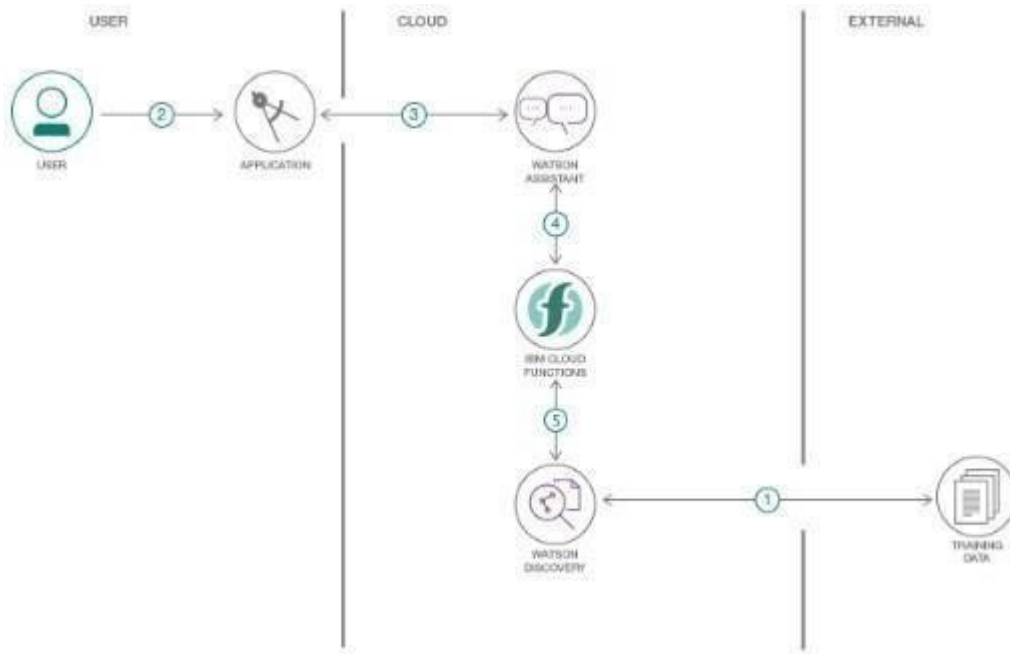
Hardware /Software Designing

1. Create necessary Watson Services.
2. Configure Watson Discovery.
3. Create Watson Cloud Functions Action.
4. Configure Watson Assistant.
5. Integrate Watson Discovery with Watson Assistant using webhooks.
6. Build Node-RED flow to integrate Watson Assistant and Web Dashboard.

4. Experimental Investigation
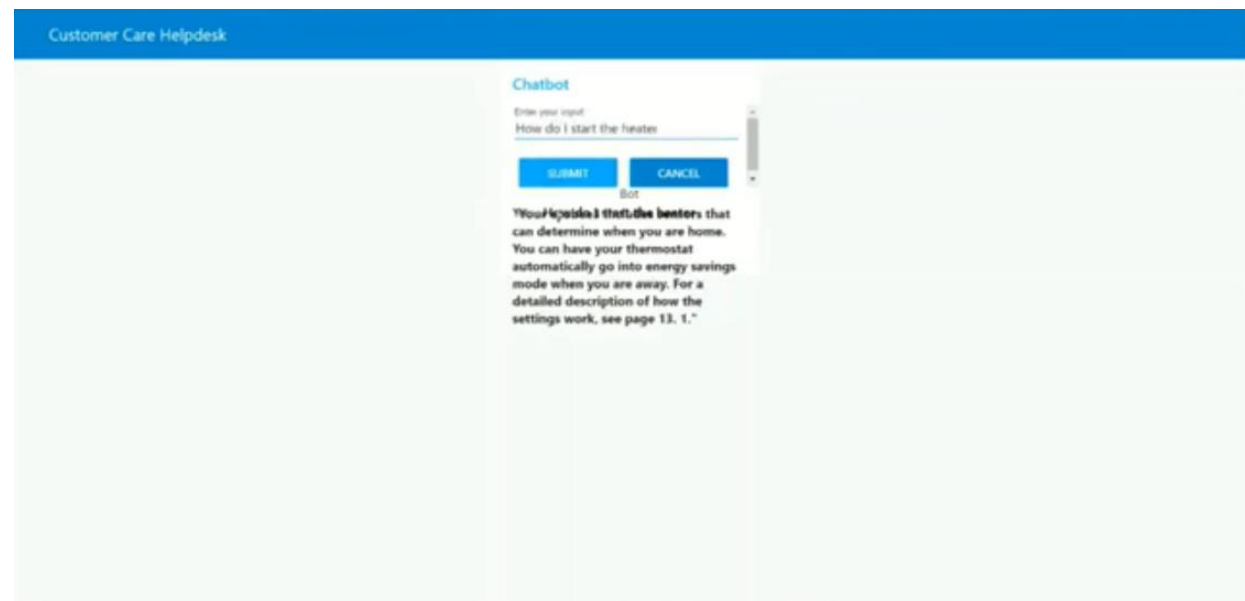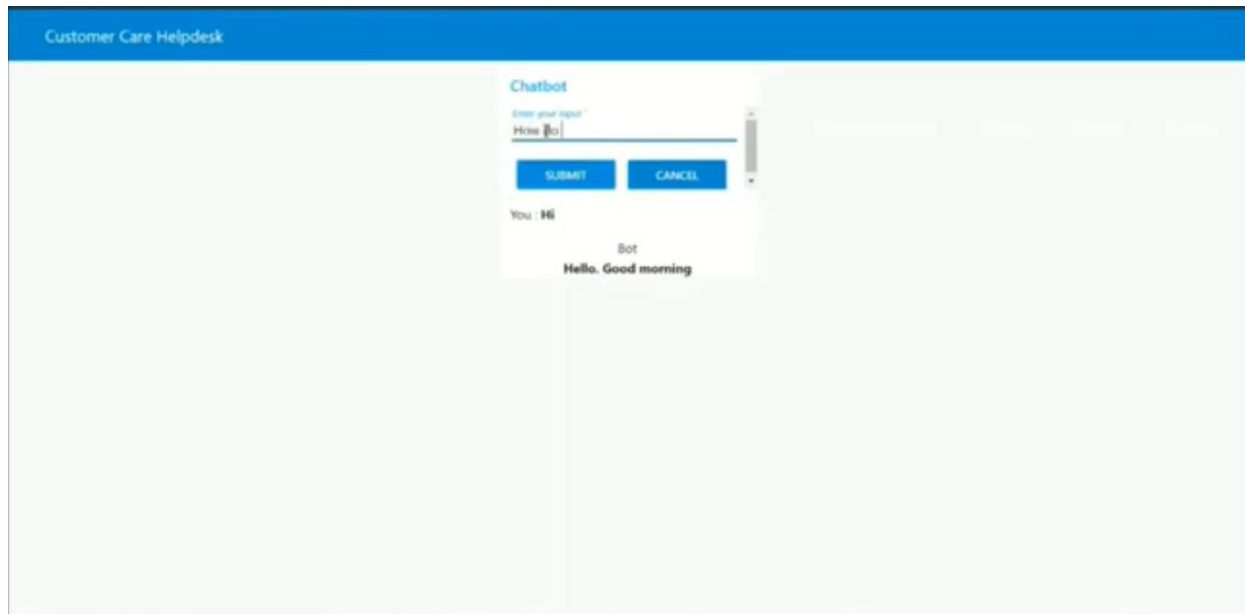
5. Flowchart
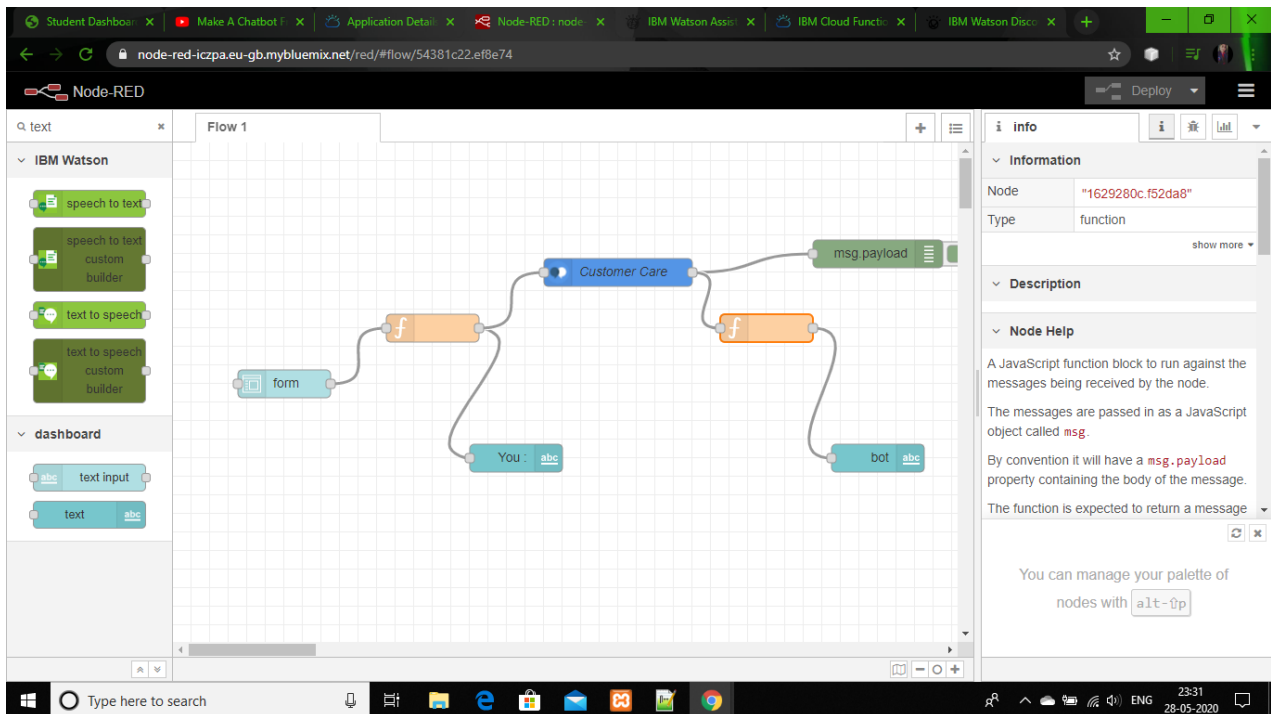
Insert the following nodes into the flow in Node-RED.

- Inject
- Debug
- form
- text

- function
- Assitant

6. Results

Web based UI was developed by integrating all the services using Node-RED.

URL for UI Dashboard : https://node-red-iczpa.eu-gb.mybluemix.net/ui/#!/0?socketid=Hvx_Kl0kIcOJRrViAAAA

7. Advantages & Disadvantages

Advantages

1. Reduces Man power
2. Cost Efficient

3. Less and less calls will be diverted to Customer Representatives.

Disadvantages

1. Sometimes it can mislead customers as it tries to search irrelevant information in the manual. 2. It may also give same answers to different queries.

8. Applications

1. This chatbot can be deployed to various websites as it can solve a lot of basic questions.

2. It can be used to deploy as Customer Helpdesk for small scale products as their manual usually has the solution for the user's problems.

9. Conclusion

An Intelligent Customer Helpdesk Chatbot was created using various Watson services like Watson Discovery, Watson Assistant, Watson Cloud Functions and Node-RED.

10. Future Scope

In the future, various other Watson services like Text-To-Speech and Speech-To-Text can be integrated in the chatbot. This can make the chatbot Hands-free.

11. Bibliography

1. Node-RED Starter Application:

   https://developer.ibm.com/tutorials/how-to-create-a-node-red-starter-application/

2. Build your own AI assistant :https://www.youtube.com/watch?v=h itUOFNne14

3. How to use Watson Assistant with Webhooks: https://www.youtube.com/embed/5 z3i5IsBVnk

4. Watson Discovery :https://developer.ibm.com/articles/introduction- watson-discovery/

Appendix
Source Code

Node-RED Flow code

```
[
  {
    "id": "e33fd96c.b1f498",
    "type": "tab",
    "label":
    "Flow      1",
```

"disabled":
false, "info":
""
},
{
  "id": "4719271e.f67278",
  "type": "debug",
  "z":
  "e33fd96c.b1f498",
  "name": "", "active":
  false, "tosidebar": true,
  "console": false,
  "tostatus": false,
  "complete": "payload",
  "targetType":
  "msg", "x": 610,
  "y": 180,
  "wires": []
},
{
  "id":
  "f09213bd.f0c9b",
  "type": "ui_text", "z":
  "e33fd96c.b1f498",
  "group":
  "d0a6c0ac.8980d",
  "order": 2,
  "width": 10,
  "height": 2,
  "name":
  "Query",
  "label": "User Input",
  "format":

```
      "{{msg.payload}}",
      "layout": "col-center",
      "x": 790,
      "y": 240,
      "wires": [],
      "inputLabels"
      : [
        "asd"
      ]
    },
    {
      "id": "6783034d.ab58ec",
      "type":            "watson-
      conversation-v1", "z":
      "e33fd96c.b1f498",
      "name": "",
      "workspaceid": "7f61646e-240e-43be-
      9e45- 53f8eeeb2038", "multiuser": false,
      "context": false, "empty-payload": false,
      "service- endpoint": "", "timeout": "",
      "optout-learning": false, "x": 780,
      "y": 400,
      "wires
        ": [ [
          "c4de52e9.4afa1"
          ,
          "2a9036a7.6e21d
          a"
        ]
      ]
    },
    {
```

```
    "id":
    "3fac1262.28ad6e",
    "type": "ui_text", "z":
    "e33fd96c.b1f498",
    "group":
    "ff862856.2e9e98",
    "order": 1,
    "width": 15,
    "height": 13,
    "name":
    "Response",
    "label": "",
    "format":
    "{{msg.payload}}"
    , "layout": "row-
    spread", "x":
    1160,
    "y": 240,
    "wires": []
  },
  {
    "id": "a4d26d94.bf4a9",
    "type": "debug",
    "z": "e33fd96c.b1f498",
    "name": "",
    "active": true,
    "tosidebar":
    true,
    "console":
    false,
    "tostatus":
    false,
```

```
"complete":
"payload",
"targetType":
"msg", "x": 1170,
"y": 360,
"wires": []
},
{
  "id": "c4de52e9.4afa1",
  "type": "function",
  "z": "e33fd96c.b1f498",
  "name": "",
  "func": "msg.payload.text=\"\";
  \nif(msg.payload.context.webhook_result_1)\n{
\n for(var i in msg.payload.context.webhook_result_1.results)\n {
  \n
  msg.payload.text=msg.payload.text+\"<br>\"+msg.payload.c
  ont
ext.webhook_result_ 1.results[i].subtitle;\n
msg.payload.text=msg.payload.text+\"<br><br>\"+msg.payload
.context.webhook_re sult_1.results[i].text+"<br>"; \n    } \n
msg.payload=msg.payload.text; \n \n} \nelse
\nmsg.payload =
  msg.payload.output.text[0];\nreturn msg; ",
  "outputs": 1,
  "noerr": 0,
  "x": 970,
  "y": 320,
  "wires
    ": [ [
      "a4d26d94.bf4a9"
      ,
      "3fac1262.28ad6e
```

```json
            "
        ]
    ]
},
{
    "id": "7d69ebf8.9cafb4",
    "type": "ui_form",
    "z": "e33fd96c.b1f498",
    "name": "",
    "label": "",
    "group":
    "d0a6c0ac.8980d",
    "order": 4,
    "width": 10,
    "height": 2,
    "options": [
        {
            "label": "Enter your
            Query", "value":
            "query", "type":
            "text", "required":
            true,
            "rows": null
        }
    ],
"formValue": {
    "query": ""
    },
    "payload": "",
    "submit": "Submit", "cancel": "Cancel", "topic": "", "x":
    390,
    "y": 320,
    "wires
```

```
        ": [ [
          "4719271e.f67278",
          "2b6857ad.e2ef98"
        ]
      ]
    },
    {
      "id": "2b6857ad.e2ef98",
      "type": "function",
      "z": "e33fd96c.b1f498",
      "name": "", "func": "msg.payload
      = msg.payload.query\nreturn
      msg;",
      "outputs": 1,
      "noerr": 0,
      "x": 590,
      "y": 320,
      "wires
        ": [ [
          "6783034d.ab58ec",
          "f09213bd.f0c9b"
        ]
      ]
    },
    {
      "id": "2a9036a7.6e21da",
      "type": "debug",
      "z": "e33fd96c.b1f498",
      "name": "",
      "active": true,
      "tosidebar":
      true,
      "console":
```

false,
"tostatus":
false,
"complete":
"false", "x":
990,
"y": 480,

```json
    "wires": []
},
{
    "id": "56cf0c53.866104",
    "type": "ui_button",
    "z":
    "e33fd96c.b1f498",
    "name": "", "group":
    "d0a6c0ac.8980d",
    "order": 1,
    "width": 10,
    "height": 1,
    "passthru":
    false, "label":
    "Reset",
    "tooltip": "",
    "color": "",
    "bgcolor": "cyan",
    "icon": "",
    "payload":
    "true",
    "payloadType":
    "bool", "topic":
    "",
    "x": 230,
    "y": 480,
    "wires
        ": [ [
            "a20966a1.6843c8"
        ]
    ]
},
{
```

```
"id": "a20966a1.6843c8",
"type": "switch",
"z":
"e33fd96c.b1f498",
"name": "", "property":
"payload",
"propertyType":
"msg", "rules": [
  {
    "t": "true"
  }
],
```

```
    "checkall":
    "false",
    "repair":
    false,
    "outputs": 1,
    "x": 410,
    "y": 480,
    "wires
      ": [ [
        "e1a2b793.b6591
        8",
        "3185b04c.79b1"
      ]
    ]
},
{
    "id": "e1a2b793.b65918",
    "type": "function",
    "z": "e33fd96c.b1f498",
    "name": "",
    "func": "msg.payload =
    \"welcome\"\nreturn msg;", "outputs":
    1,
    "noerr": 0,
    "x": 570,
    "y": 480,
    "wires
      ": [ [
        "6783034d.ab58ec"
      ]
    ]
},
{
```

"id": "7454fe98.2d066",
"type": "inject",
"z": "e33fd96c.b1f498",
"name": "",
"topic": "",
"payload":
"true",
"payloadType":
"bool", "repeat":
"",
"crontab": "",
"once": true,
"onceDelay"
:
"0.0",

```
    "x": 210,
    "y": 380,
    "wires
      ": [ [
        "a20966a1.6843c8"
      ]
    ]
  },
  {
    "id": "3185b04c.79b1",
    "type": "function",
    "z": "e33fd96c.b1f498",
    "name": "",
    "func": "msg.payload =
    \"\"\nreturn msg;", "outputs": 1,
    "noerr": 0,
    "x": 190,
    "y": 240,
    "wires
      ": [ [
        "7d69ebf8.9cafb4"

        ,
        "f09213bd.f0c9b"
      ]
    ]
  },
  {
    "id": "d0a6c0ac.8980d",
    "type": "ui_group",
    "z": "",
    "name": "Chatbox",
    "tab":
    "5e75ce40.2a426",
```

```json
    "order": 1,
    "disp": true,
    "width": "10",
    "collapse":
    false
},
{
  "id": "ff862856.2e9e98",
  "type": "ui_group",
  "z": "",
```

```json
      "name":      "Bot
      Response",
      "tab":
      "5e75ce40.2a426
      ", "order": 2,
      "disp": true,
      "width":
      "15",
      "collapse":
      false
   },
   {
      "id": "5e75ce40.2a426",
      "type": "ui_tab",
      "z": "",
       "name": "Intelligent  Customer  Help  Desk  With
       Smart    Document    Understanding",    "icon":
       "dashboard", "disabled":
      false, "hidden":
      false
   }
]
```

Watson Cloud Function Action Code

```
/**

*

* @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.

*
```

```javascript
*/
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);
});
});
}
```