Project Documentation: CardAssist

Project Structure

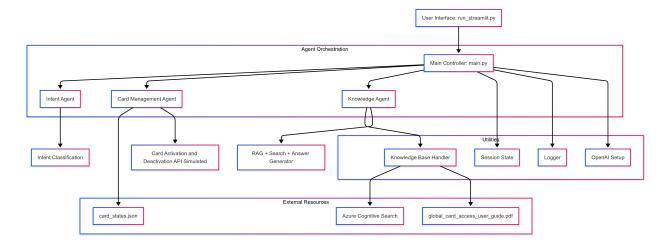
```
CardAssistBotUsingAzureSearch/
--- run_streamlit.py
 ⊢— main.py
— requirements.txt
 — global_card_access_user_guide.pdf
 — card_states.json
 ⊢— .env
 -— .gitignore
  — logs/
    — 2025-04-19/
    cardassist 2025-04-19 21-54-46.log
   – agents/
   — intent_agent.py
   — card_management_agent.py
   — knowledge_agent.py
    – pycache /
    — intent_agent.cpython-310.pyc
    --- card_management_agent.cpython-310.pyc
      - knowledge_agent.cpython-310.pyc
   utils/
  — session_state.py
  — knowledge_base.py
    — logger.py
   — openai_setup.py
    -_pycache__/
    --- session_state.cpython-310.pyc
    --- knowledge_base.cpython-310.pyc
    - logger.cpython-310.pyc
   openai setup.cpython-310.pyc
```

Overview

The CardAssist project implements a conversational AI system designed for intelligent card management, including activation, deactivation, and knowledge retrieval capabilities. The system employs a multi-agent architecture utilizing Streamlit for user interaction, OpenAI for

natural language understanding, and Azure Cognitive Search for retrieval-augmented generation (RAG).

Flow Diagram:



Project Structure and Components

Main Controller

- main.py: Orchestrates agent interactions and manages user requests.
- run streamlit.py: User interface built using Streamlit.

Agents

Intent Agent (intent_agent.py)

• Classifies user requests into specific intents.

Card Management Agent (card management agent.py)

- Handles card activation and deactivation.
- Interacts with a simulated API (card states.json) to manage card states.

Knowledge Agent (knowledge_agent.py)

- Facilitates knowledge retrieval using Azure Cognitive Search.
- Performs answer generation through RAG.

Utilities

- session_state.py: Manages conversational session states.
- logger.py: Logs activities and exceptions.

- openai setup.py: Configures OpenAI API interactions.
- knowledge_base.py: Interfaces with Azure Cognitive Search and manages PDF content.

External Resources

- Azure Cognitive Search for knowledge retrieval.
- global card access user guide.pdf: Source document for knowledge base.
- card states.json: Simulated API backend for card state management.

Configuration

- .env: Environment variables including API keys and configurations.
- requirements.txt: Lists Python dependencies.

Flow Summary

- 1. User Interaction: Users interact through a Streamlit interface (run streamlit.py).
- 2. **Request Routing**: Main controller (main.py) directs requests to specific agents based on intent classification.
- 3. Agent Processing:
 - o Intent Agent identifies intent.
 - o Card Management Agent processes card-related actions.
 - o Knowledge Agent provides answers from the knowledge base.
- 4. **Utilities and Logging**: Session management, logging, and OpenAI setup handled through utilities.
- 5. **External Integrations**: Azure Cognitive Search and simulated API backend (card states.json).

Conclusion

The CardAssist system offers an efficient, modular architecture for intelligent card management, integrating advanced AI methodologies for optimal user interaction and experience.

How to run the code?

⇒ Execute below command from terminal (it saves logs at INFO level, it can be changed based on requirements)

"python run_streamlit.py --log-level INFO"

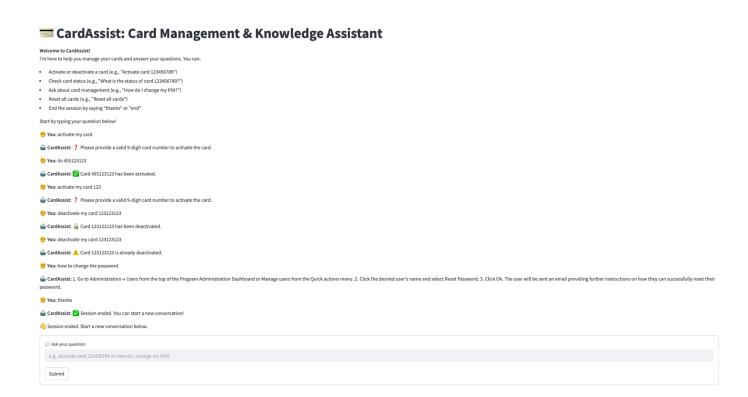
Sample Input & Output

Starting screen

Submit

CardAssist: Card Management & Knowledge Assistant Welcome to CardAssist! I'm here to help you manage your cards and answer your questions. You can: Activate or deactivate a card (e.g., "Activate card 123456789") Check card status (e.g., "What is the status of card 123456789?") Ask about card management (e.g., "How do I change my PIN?") Reset all cards (e.g., "Reset all cards") End the session by saying "thanks" or "end" Start by typing your question: e.g., Activate card 123456789 or How do I change my PIN?

Sample Examples Tried:



Appendix

Areas Of Improvement

- 1. As you can see below (Ref: SAMPLE-1), when I asked which cards are in active state, it simply shows the history of all cards which were activated (it should show only those cards which are still active based on current status)
- 2. When I asked to show the current status of the cards, then it is showing history of all the cards which were 'activated' or 'deactivated' whereas, it should only show the latest status of the cards.
- 3. We will have to include user level access control so that everything is not visible to all the users.
- 4. Persistent Storage: Replace JSON with a Database (for scalability)
 The current implementation uses *card_states.json* to store card states,
 which is not scalable for high concurrency or large datasets due to file I/O
 bottlenecks and potential race conditions.
 - Solution: Use a lightweight database like SQLite or a cloud-based database like Azure Cosmos DB for card states and action history.
 - Why: Databases handle concurrent reads/writes, provide ACID transactions, and scale better than JSON files.
- 5. The current Streamlit app runs locally, which is not scalable for multiple users or high traffic.
 - Solution: Deploy the app on a cloud platform like Azure App Service, Azure Kubernetes Service (AKS), or AWS Elastic Beanstalk.
 - Why: These platforms support auto-scaling, load balancing, and high availability.
- 6. Asynchronous Processing
 - The app uses asyncio for intent classification, but other operations (e.g., database writes, search queries) are synchronous, which can block the event loop.
 - Solution: Make database and search operations asynchronous using aiohttp for HTTP requests or aiosqlite for SQLite.
- 7. Reducing Latency in the RAG Component

The RAG component involves:

Retrieval: Vector search in Azure AI Search (agents/knowledge_agent.py).

Generation: OpenAI GPT-4 call to generate responses.

a. Optimize Vector Search

Problem: The vector search in Azure AI Search can be slow for large indexes or high-latency networks.

Solutions:

Use HNSW Parameters: Tune the HNSW algorithm for faster searches.

Reduce Result Set: Limit the number of results (k) to the minimum needed.

Precompute Embeddings: Cache embeddings locally to avoid recomputing.

b. Optimize GPT-4 Calls

Problem: The OpenAI GPT-4 call in knowledge_agent.py is a significant latency contributor due to network requests and model processing. Solutions:

Use a Faster Model: Switch to a lighter model like gpt-3.5-turbo for non-critical queries.

Batch Requests: Combine multiple queries into a single API call if applicable. Caching: Cache frequent query responses (already suggested above).

c. Parallelize Retrieval and Embedding

Problem: The embedding computation (embedding_model.encode) and

search are sequential.

Solution: Parallelize embedding computation using async or

multiprocessing.

d. Reduce PDF Processing Overhead

Problem: Extracting text from global_card_access_user_guide.pdf on every

run is slow.

Solution: Cache the extracted text chunks.

SAMPLE-1

- **You:** which cards are in active state?
- **CardAssist: Cards** activated:
 - Card 123456789 was activated.
 - Card 123456789 was activated.
 - Card 123123456 was activated.
- **You:** show the current status of cards
- **CardAssist: Oards** activated:
 - Card 123456789 was activated.
 - Card 123456789 was activated.
 - Card 123123456 was activated.
- i Cards deactivated:
 - Card 123456789 was deactivated.
 - Card 123456789 was deactivated.

- You: is card 123456789 active?
- **CardAssist: 1** Card 123456789 is currently inactive.

Installed Libraries & Dependencies

```
azure-search-documents==11.4.0
   – azure-core [required: >=1.28.0,<2.0.0, installed: 1.33.0]</p>
   — requests [required: >=2.21.0, installed: 2.32.3]
      — charset-normalizer [required: >=2,<4, installed: 3.4.1]
      — idna [required: >=2.5,<4, installed: 3.10]
        — urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
       — certifi [required: >=2017.4.17, installed: 2025.1.31]
      - six [required: >=1.11.0, installed: 1.17.0]
      typing_extensions [required: >=4.6.0, installed: 4.13.2]
    - azure-common [required: ~=1.1, installed: 1.1.28]
  isodate [required: >=0.6.0, installed: 0.7.2]
faiss-cpu==1.10.0
 --- numpy [required: >=1.25.0,<3.0, installed: 2.2.4]
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ipykernel==6.29.5
 — appnope [required: Any, installed: 0.1.4]
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  traitlets [required: >=4, installed: 5.14.3]
 --- debugpy [required: >=1.6.5, installed: 1.8.14]
   — ipython [required: >=7.23.1, installed: 8.35.0]
   — decorator [required: Any, installed: 5.2.1]
   — exceptiongroup [required: Any, installed: 1.2.2]
     — jedi [required: >=0.16, installed: 0.19.2]
       — parso [required: >=0.8.4,<0.9.0, installed: 0.8.4]</p>
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     – certifi [required: >=2017.4.17, installed: 2025.1.31]
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referencing [required: >=0.28.4, installed: 0.36.2]
              - attrs [required: >=22.2.0, installed: 25.3.0]
           - rpds-py [required: >=0.7.0, installed: 0.24.0]
             - typing_extensions [required: >=4.4.0, installed: 4.13.2]
           rpds-py [required: >=0.7.1, installed: 0.24.0]
          jsonschema-specifications [required: >=2023.5.2, installed: 2024.10.1]
          - referencing [required: >=0.31.0, installed: 0.36.2]
          — attrs [required: >=22.2.0, installed: 25.3.0]
            — rpds-py [required: >=0.7.0, installed: 0.24.0]
            -typing extensions [required: >=4.4.0, installed: 4.13.2]
         rfc3339-validator [required: Any, installed: 0.1.4]
        — six [required: Any, installed: 1.17.0]
     parse [required: Any, installed: 1.20.2]
    -typing_extensions [required: >=4.8.0,<5.0.0, installed: 4.13.2]
   ·Werkzeug [required: <3.1.2, installed: 3.1.1]
     - MarkupSafe [required: >=2.1.1, installed: 3.0.2]
--- websockets [required: >=13,<16, installed: 15.0.1]
 — aiortc [required: >=1.9.0, installed: 1.11.0]
 --- aioice [required: >=0.9.0,<1.0.0, installed: 0.10.1]
    — dnspython [required: >=2.0.0, installed: 2.7.0]
    — ifaddr [required: >=0.2.0, installed: 0.2.0]
 ---- av [required: >=14.0.0,<15.0.0, installed: 14.3.0]
    - cffi [required: >=1.0.0, installed: 1.17.1]
       pycparser [required: Any, installed: 2.22]
    - cryptography [required: >=44.0.0, installed: 44.0.2]
      - cffi [required: >=1.12, installed: 1.17.1]
       pycparser [required: Any, installed: 2.22]
   — google-crc32c [required: >=1.1, installed: 1.7.1]
     pyee [required: >=13.0.0, installed: 13.0.0]
    typing_extensions [required: Any, installed: 4.13.2]
    - pylibsrtp [required: >=0.10.0, installed: 0.12.0]
      - cffi [required: >=1.0.0, installed: 1.17.1]
     pycparser [required: Any, installed: 2.22]
    pyOpenSSL [required: >=25.0.0, installed: 25.0.0]
      - cryptography [required: >=41.0.5,<45, installed: 44.0.2]
       - cffi [required: >=1.12, installed: 1.17.1]
       pycparser [required: Any, installed: 2.22]
     -typing_extensions [required: >=4.9, installed: 4.13.2]
 - opentelemetry-api [required: ~=1.24, installed: 1.32.1]
  — Deprecated [required: >=1.2.6, installed: 1.2.18]
     - wrapt [required: >=1.10,<2, installed: 1.17.2]</p>
   -importlib_metadata [required: >=6.0,<8.7.0, installed: 8.6.1]
```

```
-zipp [required: >=3.20, installed: 3.21.0]
  - opentelemetry-sdk [required: ~=1.24, installed: 1.32.1]
  ---- opentelemetry-api [required: ==1.32.1, installed: 1.32.1]
       - Deprecated [required: >=1.2.6, installed: 1.2.18]
        – wrapt [required: >=1.10,<2, installed: 1.17.2]</p>
      -importlib_metadata [required: >=6.0,<8.7.0, installed: 8.6.1]
       - zipp [required: >=3.20, installed: 3.21.0]
    — opentelemetry-semantic-conventions [required: ==0.53b1, installed: 0.53b1]
      - Deprecated [required: >=1.2.6, installed: 1.2.18]
      wrapt [required: >=1.10,<2, installed: 1.17.2]
      opentelemetry-api [required: ==1.32.1, installed: 1.32.1]
        Deprecated [required: >=1.2.6, installed: 1.2.18]
         — wrapt [required: >=1.10,<2, installed: 1.17.2]</p>
        -importlib_metadata [required: >=6.0,<8.7.0, installed: 8.6.1]
       ___ zipp [required: >=3.20, installed: 3.21.0]
    typing_extensions [required: >=3.7.4, installed: 4.13.2]
   prance [required: ~=23.6.21.0, installed: 23.6.21.0]
    - chardet [required: >=3.0, installed: 5.2.0]
    - ruamel.yaml [required: >=0.17.10, installed: 0.18.10]
     - ruamel.yaml.clib [required: >=0.2.7, installed: 0.2.12]
    – requests [required: >=2.25, installed: 2.32.3]
       - charset-normalizer [required: >=2,<4, installed: 3.4.1]
       - idna [required: >=2.5,<4, installed: 3.10]
    — urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
     - certifi [required: >=2017.4.17, installed: 2025.1.31]
   — six [required: ~=1.15, installed: 1.17.0]
    packaging [required: >=21.3, installed: 24.2]
   pybars4 [required: ~=0.9, installed: 0.9.13]
 — PyMeta3 [required: >=0.5.1, installed: 0.5.1]
 - Jinja2 [required: ~=3.1, installed: 3.1.6]
MarkupSafe [required: >=2.0, installed: 3.0.2]
___ numpy [required: >=1.23.5,<2.5, installed: 2.2.4]
---- websockets [required: >=13,<16, installed: 15.0.1]
- aiortc [required: >=1.9.0, installed: 1.11.0]
--- aioice [required: >=0.9.0,<1.0.0, installed: 0.10.1]
   — dnspython [required: >=2.0.0, installed: 2.7.0]
    ifaddr [required: >=0.2.0, installed: 0.2.0]
---- av [required: >=14.0.0,<15.0.0, installed: 14.3.0]
   - cffi [required: >=1.0.0, installed: 1.17.1]
    pycparser [required: Any, installed: 2.22]
```

```
- cryptography [required: >=44.0.0, installed: 44.0.2]
       - cffi [required: >=1.12, installed: 1.17.1]
      pycparser [required: Any, installed: 2.22]
      -google-crc32c [required: >=1.1, installed: 1.7.1]
      - pyee [required: >=13.0.0, installed: 13.0.0]
      typing_extensions [required: Any, installed: 4.13.2]
      - pylibsrtp [required: >=0.10.0, installed: 0.12.0]
       - cffi [required: >=1.0.0, installed: 1.17.1]
      pycparser [required: Any, installed: 2.22]
     pyOpenSSL [required: >=25.0.0, installed: 25.0.0]
       — cryptography [required: >=41.0.5,<45, installed: 44.0.2]</p>
        — cffi [required: >=1.12, installed: 1.17.1]
        pycparser [required: Any, installed: 2.22]
       -typing_extensions [required: >=4.9, installed: 4.13.2]
sentence-transformers==4.1.0
 — transformers [required: >=4.41.0,<5.0.0, installed: 4.51.3]
     filelock [required: Any, installed: 3.18.0]
      - huggingface-hub [required: >=0.30.0,<1.0, installed: 0.30.2]</p>
      — filelock [required: Any, installed: 3.18.0]
        - fsspec [required: >=2023.5.0, installed: 2025.3.2]
         packaging [required: >=20.9, installed: 24.2]
        – PyYAML [required: >=5.1, installed: 6.0.2]
        — requests [required: Any, installed: 2.32.3]
        --- charset-normalizer [required: >=2,<4, installed: 3.4.1]
        — idna [required: >=2.5,<4, installed: 3.10]
        --- urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
          – certifi [required: >=2017.4.17, installed: 2025.1.31]
        — tgdm [required: >=4.42.1, installed: 4.67.1]
        - typing_extensions [required: >=3.7.4.3, installed: 4.13.2]
      – numpy [required: >=1.17, installed: 2.2.4]
       packaging [required: >=20.0, installed: 24.2]
      - PyYAML [required: >=5.1, installed: 6.0.2]
       regex [required: !=2019.12.17, installed: 2024.11.6]
      - requests [required: Any, installed: 2.32.3]
         - charset-normalizer [required: >=2,<4, installed: 3.4.1]
      — idna [required: >=2.5,<4, installed: 3.10]
      — urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
        - certifi [required: >=2017.4.17, installed: 2025.1.31]
    - huggingface-hub [required: >=0.16.4,<1.0, installed: 0.30.2]
        — filelock [required: Any, installed: 3.18.0]
          -fsspec [required: >=2023.5.0, installed: 2025.3.2]
```

```
packaging [required: >=20.9, installed: 24.2]
        - PyYAML [required: >=5.1, installed: 6.0.2]
       - requests [required: Any, installed: 2.32.3]
       --- charset-normalizer [required: >=2,<4, installed: 3.4.1]
       — idna [required: >=2.5,<4, installed: 3.10]
       — urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
      certifi [required: >=2017.4.17, installed: 2025.1.31]
       -tgdm [required: >=4.42.1, installed: 4.67.1]
       typing_extensions [required: >=3.7.4.3, installed: 4.13.2]
  – safetensors [required: >=0.4.3, installed: 0.5.3]
  - tqdm [required: >=4.27, installed: 4.67.1]
tgdm [required: Any, installed: 4.67.1]
- torch [required: >=1.11.0, installed: 2.6.0]
— filelock [required: Any, installed: 3.18.0]
   typing_extensions [required: >=4.10.0, installed: 4.13.2]
 — networkx [required: Any, installed: 3.4.2]
  — Jinja2 [required: Any, installed: 3.1.6]
   — MarkupSafe [required: >=2.0, installed: 3.0.2]
   - fsspec [required: Any, installed: 2025.3.2]
  sympy [required: ==1.13.1, installed: 1.13.1]
   - mpmath [required: >=1.1.0,<1.4, installed: 1.3.0]
scikit-learn [required: Any, installed: 1.6.1]
— numpy [required: >=1.19.5, installed: 2.2.4]
  — scipy [required: >=1.6.0, installed: 1.15.2]
  ___ numpy [required: >=1.23.5,<2.5, installed: 2.2.4]
   - joblib [required: >=1.2.0, installed: 1.4.2]
  -threadpoolctl [required: >=3.1.0, installed: 3.6.0]
scipy [required: Any, installed: 1.15.2]
 – numpy [required: >=1.23.5,<2.5, installed: 2.2.4]</p>
– huggingface-hub [required: >=0.20.0, installed: 0.30.2]
— filelock [required: Any, installed: 3.18.0]
--- fsspec [required: >=2023.5.0, installed: 2025.3.2]
--- packaging [required: >=20.9, installed: 24.2]
  — PyYAML [required: >=5.1, installed: 6.0.2]
  requests [required: Any, installed: 2.32.3]
    — idna [required: >=2.5,<4, installed: 3.10]
   --- urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
    - certifi [required: >=2017.4.17, installed: 2025.1.31]
  — tqdm [required: >=4.42.1, installed: 4.67.1]
  typing_extensions [required: >=3.7.4.3, installed: 4.13.2]
- pillow [required: Any, installed: 11.2.1]
```

```
-typing extensions [required: >=4.5.0, installed: 4.13.2]
setuptools==65.5.0
streamlit==1.44.1
— altair [required: >=4.0,<6, installed: 5.5.0]
     Jinja2 [required: Any, installed: 3.1.6]
     MarkupSafe [required: >=2.0, installed: 3.0.2]
   - jsonschema [required: >=3.0, installed: 4.23.0]
      — attrs [required: >=22.2.0, installed: 25.3.0]
        - jsonschema-specifications [required: >=2023.03.6, installed: 2024.10.1]
         — referencing [required: >=0.31.0, installed: 0.36.2]
          — attrs [required: >=22.2.0, installed: 25.3.0]
          - typing_extensions [required: >=4.4.0, installed: 4.13.2]
      — referencing [required: >=0.28.4, installed: 0.36.2]
        — attrs [required: >=22.2.0, installed: 25.3.0]
        \vdash—rpds-py [required: >=0.7.0, installed: 0.24.0]
          - typing_extensions [required: >=4.4.0, installed: 4.13.2]
       - rpds-py [required: >=0.7.1, installed: 0.24.0]
    packaging [required: Any, installed: 24.2]
     - typing_extensions [required: >=4.10.0, installed: 4.13.2]
  — cachetools [required: >=4.0,<6, installed: 5.5.2]
 — click [required: >=7.0,<9, installed: 8.1.8]
 — numpy [required: >=1.23,<3, installed: 2.2.4]
 — packaging [required: >=20,<25, installed: 24.2]
   – pandas [required: >=1.4.0,<3, installed: 2.2.3]</p>
   — numpy [required: >=1.22.4, installed: 2.2.4]
     — python-dateutil [required: >=2.8.2, installed: 2.9.0.post0]
     ___ six [required: >=1.5, installed: 1.17.0]
   — pytz [required: >=2020.1, installed: 2025.2]
  _____tzdata [required: >=2022.7, installed: 2025.2]
   — pillow [required: >=7.1.0,<12, installed: 11.2.1]</p>
 ---- protobuf [required: >=3.20,<6, installed: 5.29.4]
 --- pyarrow [required: >=7.0, installed: 19.0.1]
 — requests [required: >=2.27,<3, installed: 2.32.3]
   --- charset-normalizer [required: >=2,<4, installed: 3.4.1]
   — idna [required: >=2.5,<4, installed: 3.10]
   --- urllib3 [required: >=1.21.1,<3, installed: 2.4.0]
    – certifi [required: >=2017.4.17, installed: 2025.1.31]
 \vdash— tenacity [required: >=8.1.0,<10, installed: 9.1.2]
 — toml [required: >=0.10.1,<2, installed: 0.10.2]
```

```
├— typing_extensions [required: >=4.4.0,<5, installed: 4.13.2]
    ├— GitPython [required: >=3.0.7,<4,!=3.1.19, installed: 3.1.44]
    └─ gitdb [required: >=4.0.1,<5, installed: 4.0.12]
    └─ smmap [required: >=3.0.1,<6, installed: 5.0.2]
    ├── pydeck [required: >=0.8.0b4,<1, installed: 0.9.1]
    ├── Jinja2 [required: >=2.10.1, installed: 3.1.6]
    └─ MarkupSafe [required: >=2.0, installed: 3.0.2]
    └─ numpy [required: >=1.16.4, installed: 2.2.4]
    └─ tornado [required: >=6.0.3,<7, installed: 6.4.2]
```