Chatbot for IntelligenceEDGE

Team & Roles

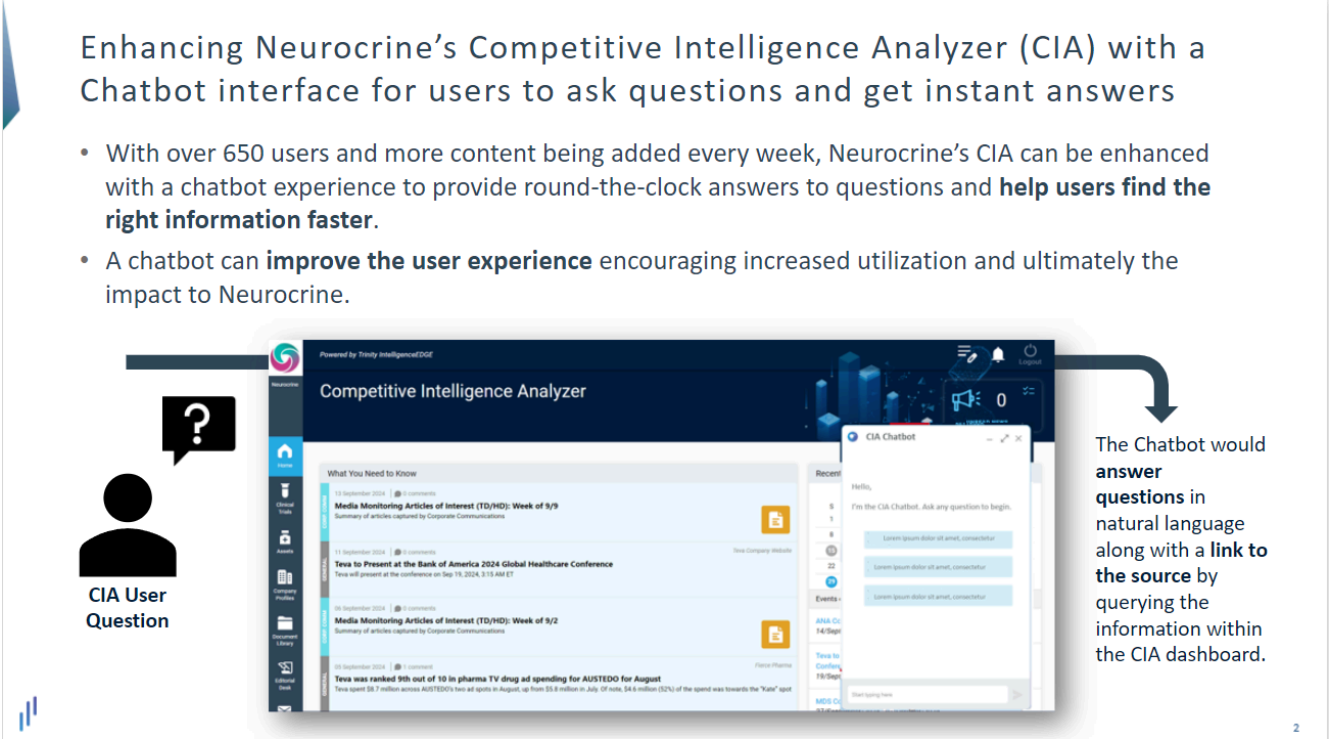
Name	Role	
Tarra Maeshima @Tarra Maeshima	Product Strategy Lead	Tarra is the product lead for IntelligenceEDGE and will be acting as the lead for this feature devellopment, which is like a project within a project.
Nick Broadhead @Nicholas Broadhead	Product Strategy Team	Nick is the product lead for the Automation work and his role on this project is to assist with driving the work needed to pull in the content from the articles that are to be searched by the Chatbot. Nick is also the product strategy lead for HTA Vision, which is creating a Chatbot, so he has this relevant experience to bring to the table.
Nat Mohan @Nat Mohan	Technical Lead	Nat is the technical lead for IntelligenceEDGE and will be acting as the lead for this feature from a technical standpoint. Nat has also been the Technical Lead for HTA Vision's Chatbot, so he has all of that background in his back pocket.
Sangeetha Pillai @Sangeetha Pillai	UI/UX Design Lead	Sangeetha will be the designer for this feature. She did the designs for IntgelligneceEDGE and also for HTA Vision and the Chatbot. The idea here is to leverage as much of the HTA Vision Chatbot design as possible but make it work within IntelligenceEDGE.
Richard Nader (RJ) @Richard Nader Jr	Fynydd Developer	Richard works at a vendor called Fynydd. Fynydd helped Trinity with the creation of both IntelligenceEDGE and HTA Vision and has deep experience with Umbraco CMS system on which both applications use. He will help with the data pipelines, thought partnership, UI/UX implementation and back-end integration.
TBD	Trinity Developer	tbd
Abhinav Jain / TBD	QA & Testing Lead	tbd - Testing to be integrated in November sometime.

Business Objectives

- **Primary Objective:** Create an easy way for users of IntelligenceEDGE to ask questions and receive answers in a conversational manner, e.g. Chatbot interface. This will help users find the right information quicker and ultimately improve the user experience and engagement in IntelligenceEDGE.
- **Secondary Objective:** Add functionality to IntelligneceEDGE that will make the product more appealing to customers and more competitive with other players in the market.

Additional Context

- **Context:** At Neurocrine's request, Trinity provided a proposal to create a Chatbot overlay experience for their CI Dashboard within IntelligenceEDGE. Neurocrine has decided to proceed and agreed to pay for this to be created. We would like to proceed with creating this functionality in such a way that it can be rolled out to Neurocrine and also be added to other dashboards when clients elect for this functionality.
  - This image is what was included in the proposal to Neurocrine.



Timeline & Project Duration

- **Timeline & Project Duration:** We provided a project duration for the client within the proposal. It is pictured below for our reference, but essentially, we are estimating that this project will take 12 weeks in total. This image is what was included in the proposal to Neurocrine. We expect to begin the count down for this body of work the week of October 21st. This would mean that the end of the 12th week is January 3rd. This being said, we should (at minimum) add one week for Thanksgiving and one week for the Christmas and New Year Holidays and perhaps another week or two for the India festivals. My best guess is that we should aim for ~January 24th as our final push to production.
- We will have at least three SCRUM meetings per week - possibly four.

	Task	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12
Requirements and Design	Core Team Meetings												
	Requirements documentation												
	Chat bot design												
Development and Initial Testing	Modify Neurocrine IntelligenceEDGE data to be queriable by the chat bot												
	Back-end work to pull chatbot solution into IntelligenceEDGE												
	Build the UI within IntelligenceEDGE												
	Testing time												
	Debugging time												
Finalize	UAT time												
	Finalize Product Feature to be Launch Ready												

Business Requirements

- Create a Generative AI Chatbot for both of Neurocrine's dashboards, the "TD/HDC Dashboard" and the "CAH Dashboard".

- The Chatbot should have a user interface that is designed to look very similar (if not identical) to the Chatbot that is being created for HTA Vision.
- The Chatbot should only allow users who have access to the respective dashboard(s) to ask questions and see answers.
- The Chatbot should only search the documents associated to the dashboard that they are in when asking the question. We do not want information flowing between the two dashboards even if the user has access to both.
- Important: Trinity Admins should have the ability to “turn off” the Chatbot and “turn on” the Chatbot at a Dashboard level. The reason for this is that the Client only has a certain amount of budget, and should any unexpected Out of Pocket maintenance costs push them over budget, we would need to “turn off” the Chatbot as to not incur any further Azure expenses.
- The Chatbot should search all **published** information that is in the dashboard where the user is engaging with the Chatbot to ask a question.
  - This includes information within all of the published widgets on all of the published pages.
  - This also includes the content within the documents that are published in the document library, as well as the document library page itself.
  - This also includes the content from any article URL that is published to one of the news feeds within the dashboard.
- The Chatbot should be created in such a way that it can be turned on for other clients with other dashboards at a future time.
- The Chatbot should be turned on for the demo dashboard that is used by the IntelligenceEDGE team. (this can be done at a later date, if needed)
- When the Chatbot is answering questions, it should provide the answer and also the source and link the user to the source document/info/content.
- We have been asked to check in with leadership on the designs prior to finalizing to get the green light that they are aligned enough with other Gen AI Chatbots being developed across the company.
- Currently the content within the articles that are posted on the dashboards are not pulled into a database. Part of this project entails working with the Automation Team to ensure this content gets pulled into the CI Automation Platform so it can then be pulled into the database that is being searched by the Chatbot. This should include a retrospective pull of the content for all article URLs that are already on the dashboard.
- If an article, piece of content, document library item is deleted it should no longer be searched by the Chatbot when answering questions moving forward.
  - We need to figure out how this should work as to not incur extra costs. (notification handler)
- The Chatbot should always only look at the current information. For example, if a Trinity user goes into the dashboard and changes something and then publishes the change, the Chatbot would only be looking at the most recent dataset. For example, let’s say the dashboard said that the 2023 revenue for a product was 100M, but then a Trinity person updated this to say that it was 110M, the Chatbot would answer the question as 110M, not 100M.
  - In other words, it should be event driven and/or only look for published information.
- The Chatbot will NOT be used to update information within the dashboard. It will only be used to pull and answer.
- Comments: Are these to be included? Tarra to inquire with Jennifer and Sebastian about this.
- Question: Should the chatbot have a couple of basic filters built in? Initially, I am thinking of product name and timeframe.