

IBM Watsonx Orchestrate AskBenefits Agent - Setup Guide

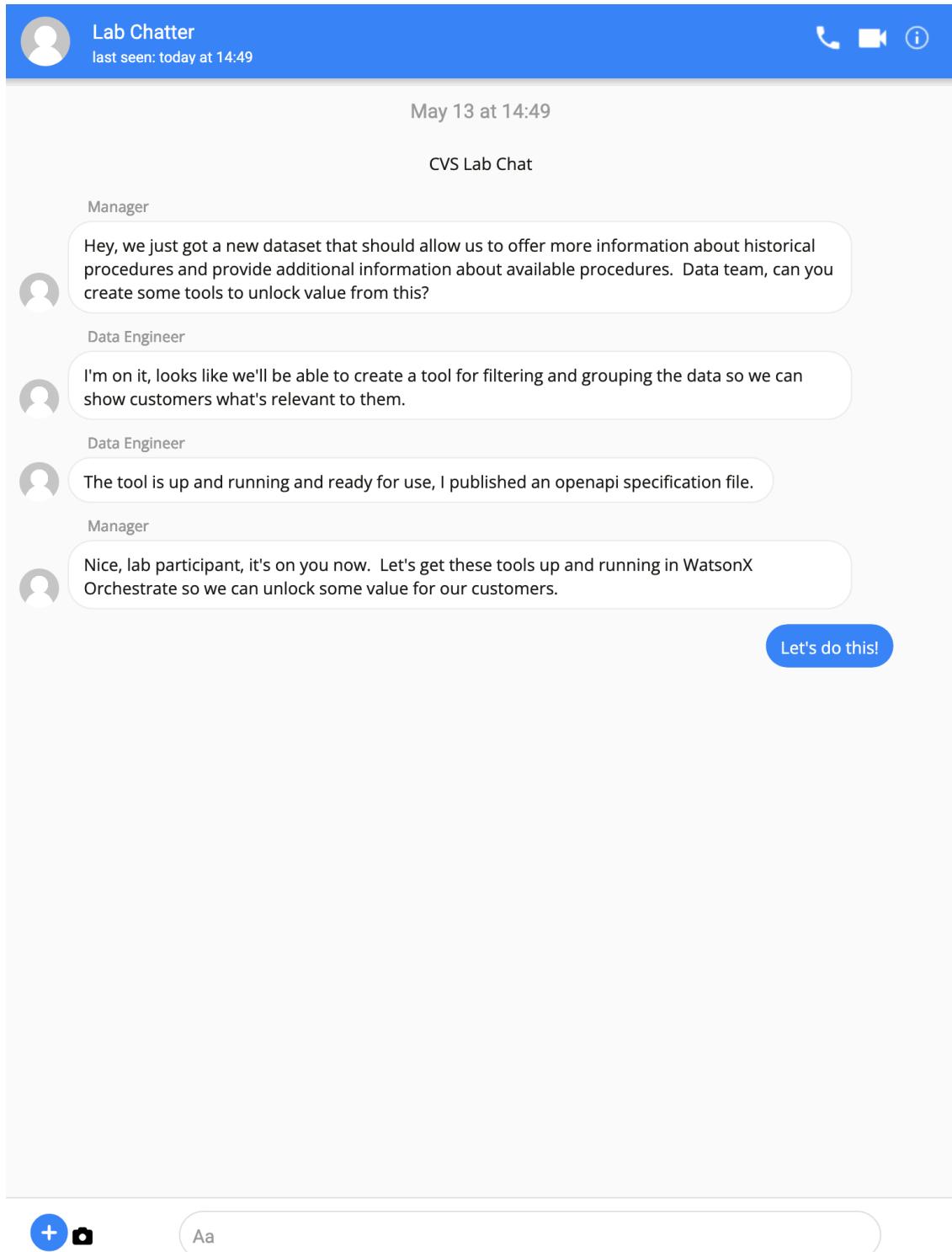
This guide walks you through the complete process of creating, configuring, and deploying agents within IBM Watsonx Orchestrate (WxO). By following this step-by-step guide with visual instructions, you'll learn how to build an AI-powered healthcare assistant capable of accurately responding to benefits-related inquiries.

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Lab Overview

In this lab, you'll step into the role of an AI solution developer working within the IBM Watsonx Orchestrate platform. The lab is designed to simulate a real-world healthcare use case by guiding you through the process of creating, configuring, and deploying intelligent agents from scratch.



Lab Chatter
last seen: today at 14:49

May 13 at 14:49

CVS Lab Chat

Manager

Hey, we just got a new dataset that should allow us to offer more information about historical procedures and provide additional information about available procedures. Data team, can you create some tools to unlock value from this?

Data Engineer

I'm on it, looks like we'll be able to create a tool for filtering and grouping the data so we can show customers what's relevant to them.

Data Engineer

The tool is up and running and ready for use, I published an openapi specification file.

Manager

Nice, lab participant, it's on you now. Let's get these tools up and running in WatsonX Orchestrate so we can unlock some value for our customers.

Let's do this!

Aa

You'll be completing **three core activities**:

1. Build your first agent – AskBenefits

You'll create this agent yourself and configure it to use prebuilt external tools via a provided OpenAPI specification. AskBenefits is designed to support healthcare-related inquiries by retrieving historical data, identifying overdue procedures, and providing guidance on upcoming care.

2. Build a second agent – AskDental

You'll also create this agent from scratch. AskDental is a document-based assistant that uses an uploaded PDF to answer policyholder questions about dental benefits. You'll define the knowledge scope and deploy the agent for use in chat.

3. Enable collaboration between both agents

Once both agents are configured and deployed, you'll link them together to simulate a multi-agent orchestration pattern. This shows how Watsonx Orchestrate enables agents to delegate responsibilities based on domain expertise.

By the end of this lab, you will have:

- Built two custom agents using Watsonx Orchestrate
- Integrated tools via OpenAPI and knowledge via document upload
- Designed a collaborative solution to handle user inquiries across medical and dental domains

This is a complete hands-on experience that showcases AI orchestration, tool integration, and document-based reasoning in a business-ready context.

Agents Overview

AskBenefits is a proactive digital assistant designed to support questions related to medical procedures and health plan benefits. The agent intelligently classifies each inquiry as pertaining to a past, future, or overdue medical procedure and invokes the most appropriate tools based on the user's intent.

The agent is capable of:

- Retrieving historical data about procedures
- Identifying overdue care
- Providing guidance on upcoming procedures
- Offering plan-specific details (e.g., pharmacy benefits, coverage)
- Assisting with appointment scheduling

AskDental is a collaboration assistant designed to support questions related to dental benefits. The agent intelligently answers each inquiry as by referencing a provided PDF document.

The agent is capable of answering a variety of questions about dental benefits and coverage.

Lab Objective

This lab demonstrates how intelligent agents can be configured and deployed in Watsonx Orchestrate to address healthcare-specific use cases. By the end of this lab, participants will:

- Understand the end-to-end agent creation process
 - Be familiar with OpenAPI-based tool integration
 - Get practical experience with multi-agent solutions
 - Gain experience testing and validating agent behavior in practical scenarios
-

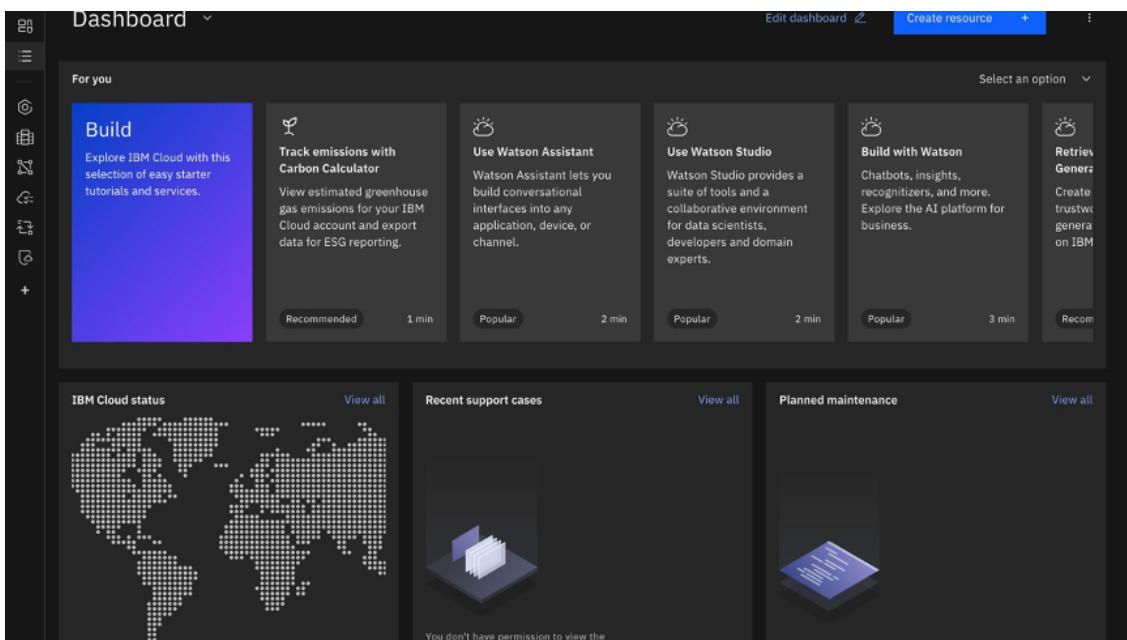
Prerequisites

- An active IBM Cloud account
 - Access to IBM Watsonx Orchestrate environment
 - The OpenAPI specification file (`openapi-tools-spec.json`)
 - The benefits file (`dental_benefits_summary.pdf`)
 - The optional WatsonX Assistant action file (`main-desk-concierge-action-v1.json`)
 - The optional reporting OpenAPI specification file (`openapi-tools-report.json`)
-

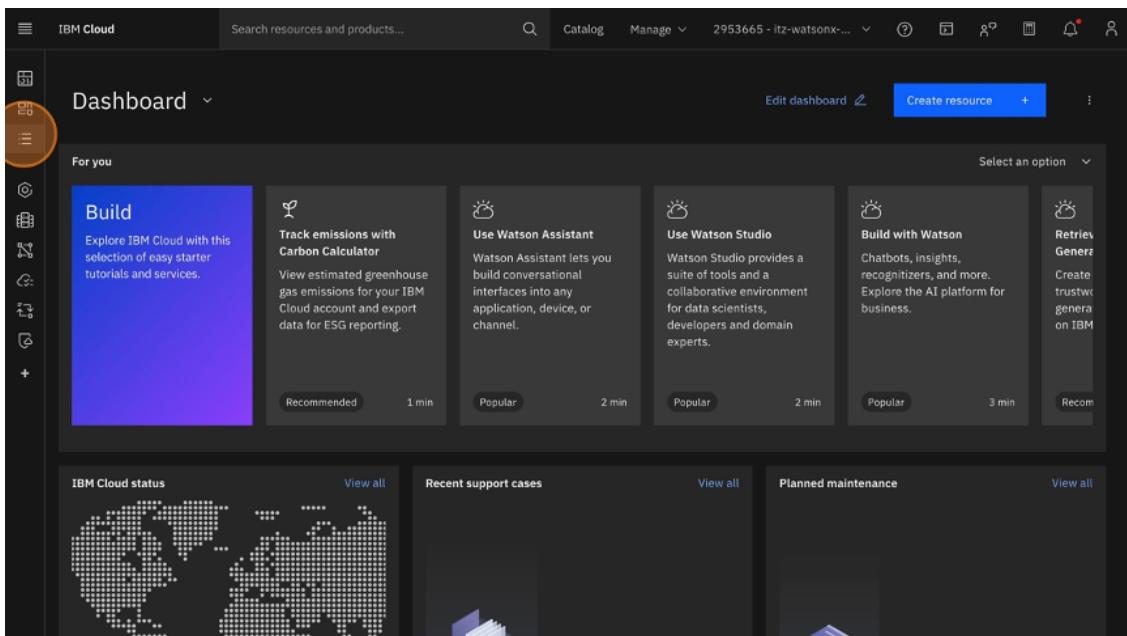
AskBenefits Step-by-Step Instructions

1. Accessing IBM Watsonx Orchestrate

1. Navigate to <https://cloud.ibm.com/>



1. Click on the menu icon in the top left corner



1. Select "Watson Orchestrate-itz"

Name	Group	Location	Product	Status	Tags
Watson Orchestrate-itz	watsonx	Dallas (us-south)	watsonx.governance	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx Orchestrate	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Runtime	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Studio	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.governance	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx Orchestrate	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Runtime	Active	
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Studio	Active	

1. Click "Launch watsonx Orchestrate"

Resource list /

Watson Orchestrate-itz Active Add tags Actions

Manage Service credentials Plan

Start by launching the tool

Launch watsonx Orchestrate Getting started tutorial

Plan Essentials Plan Upgrade

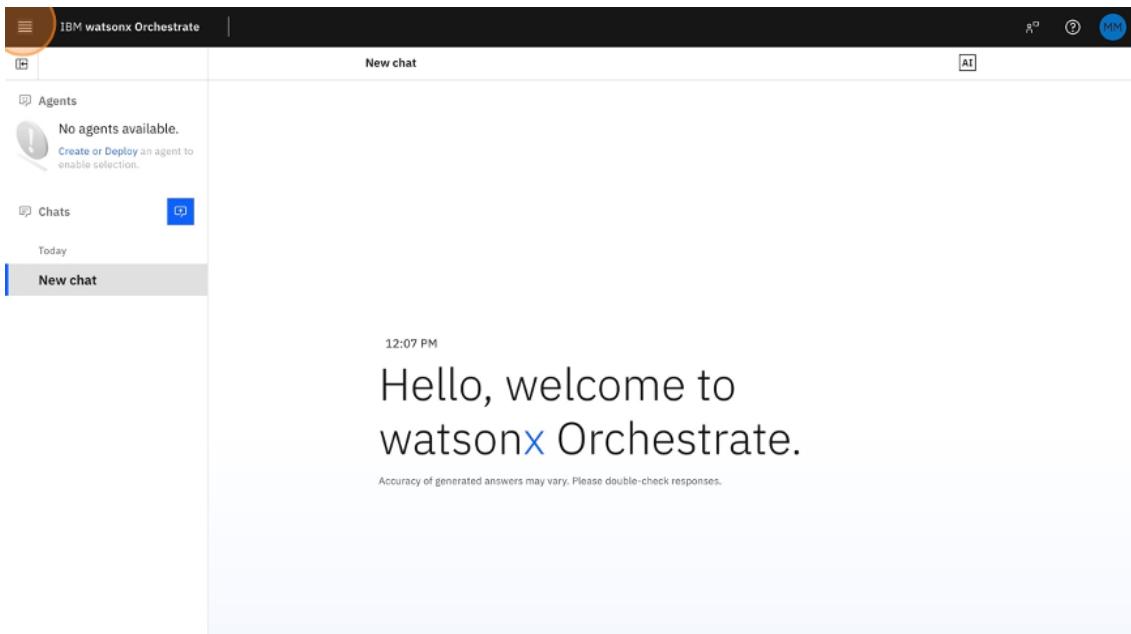
Credentials

Download Show credentials

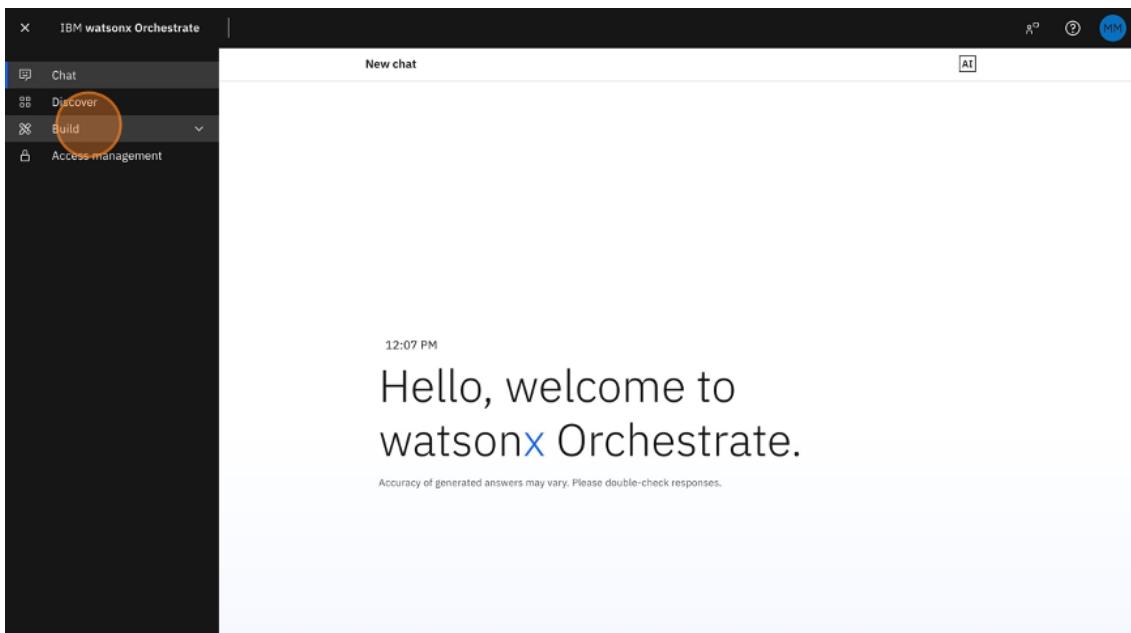
API key: Copy

URL: <https://api.us-south.assistant-builder.watson.cloud.ibm.com> Copy

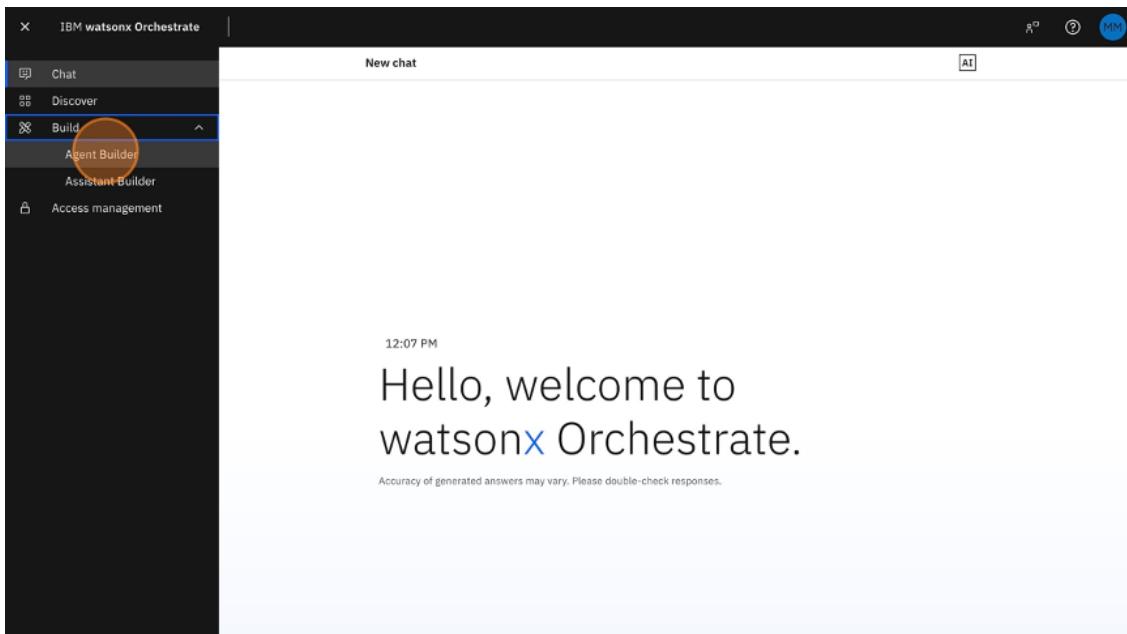
1. Click on the hamburger menu icon in the top left



1. Click on "Build"

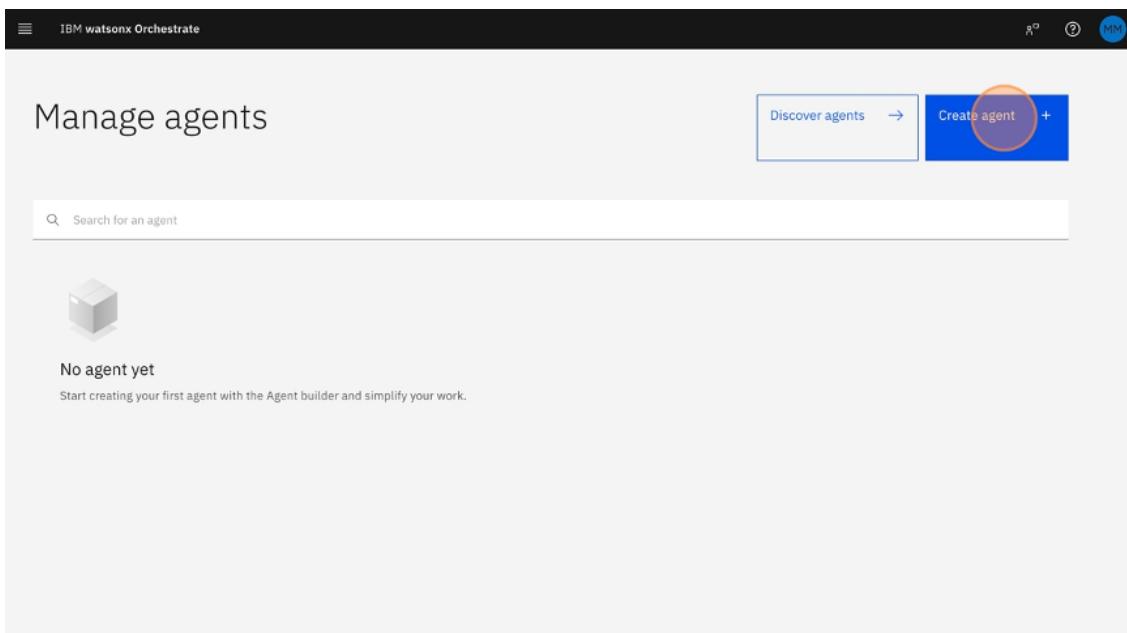


1. Select "Agent Builder"



2. Creating a New Agent

1. Click "Create agent"



1. In the "Name*" field, enter: AskBenefits

Create an agent

Create from scratch Create from template

Build your custom agent step by step to create a custom solution.

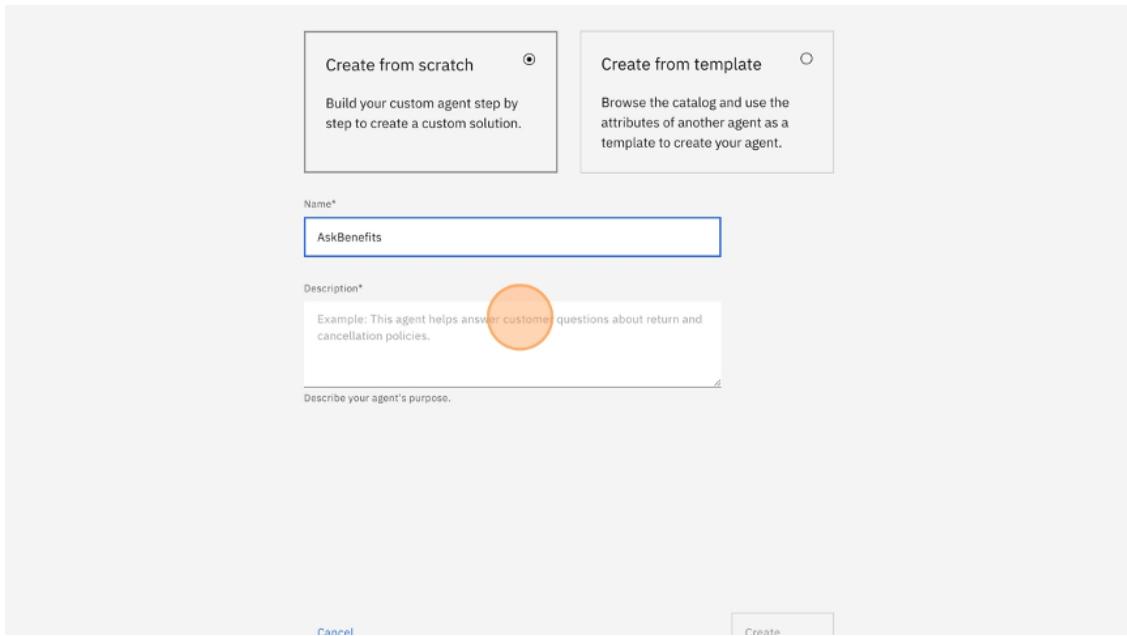
Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*
Name your agent

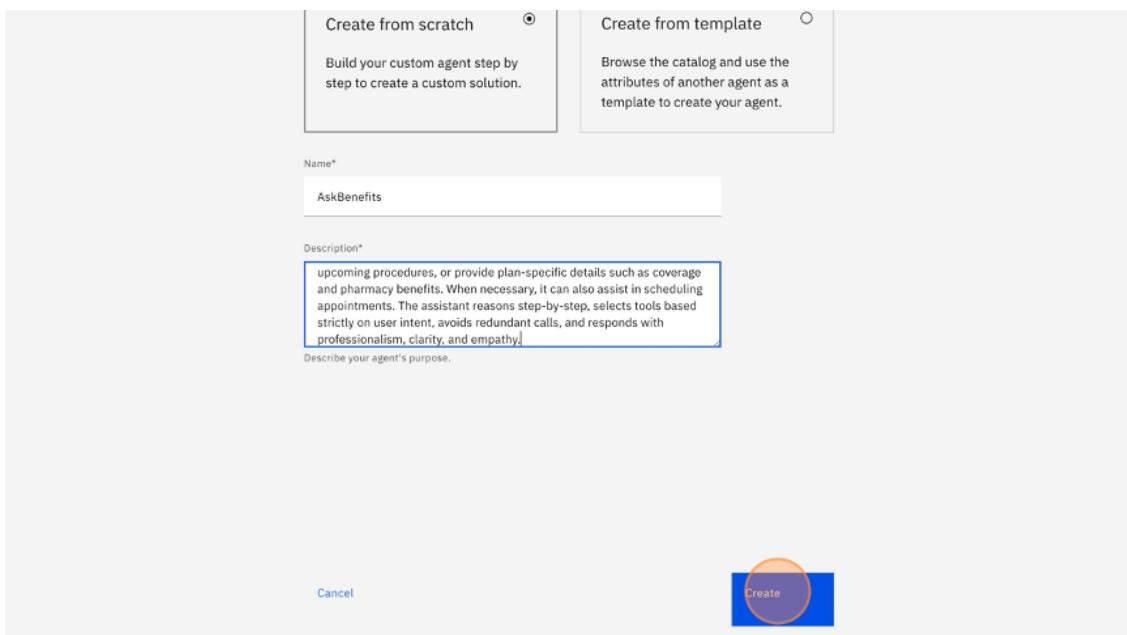
Description*
Example: This agent helps answer customer questions about return and cancellation policies.

Describe your agent's purpose.

1. In the “Description*” field, enter: A proactive healthcare assistant designed to guide users through questions related to medical procedures and health plan benefits. The agent classifies each inquiry as pertaining to a past, future, or overdue medical procedure and selects the most appropriate tool accordingly. It can retrieve historical data, identify overdue care, offer guidance on upcoming procedures, or provide plan-specific details such as coverage and pharmacy benefits. When necessary, it can also assist in scheduling appointments. The assistant reasons step-by-step, selects tools based strictly on user intent, avoids redundant calls, and responds with professionalism, clarity, and empathy.

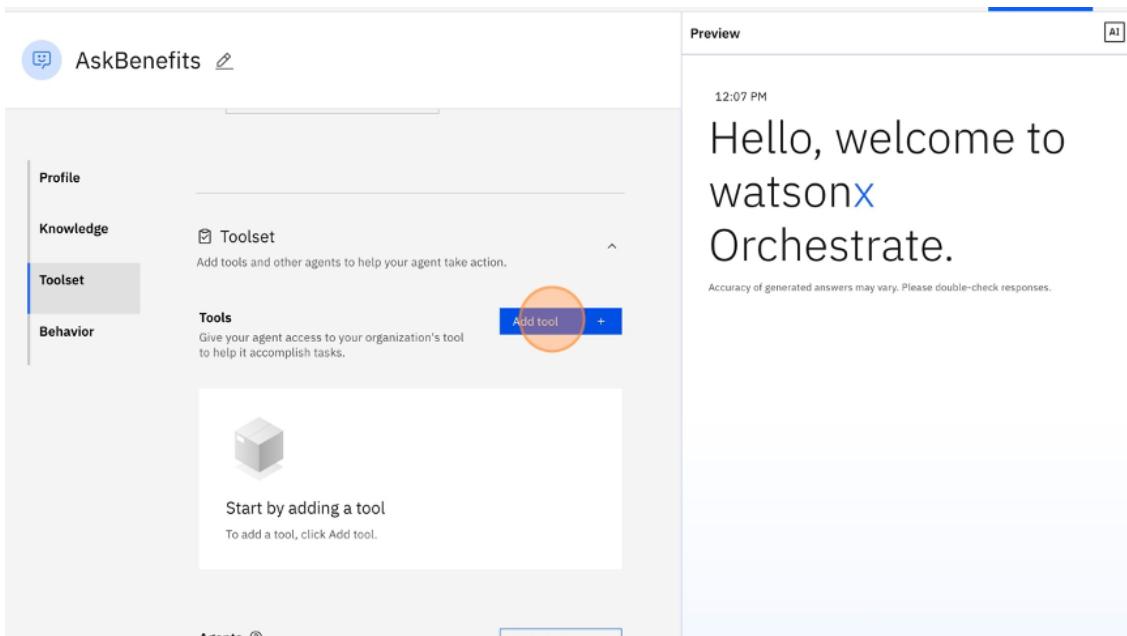


1. Click "Create" to initialize your agent



3. Importing and Attaching Tools

1. Click "Add tool"



AskBenefits 

Profile

Knowledge

Toolset

Behavior

Toolset
Add tools and other agents to help your agent take action.

Tools
Give your agent access to your organization's tool to help it accomplish tasks.

Add tool +

Start by adding a tool
To add a tool, click Add tool.

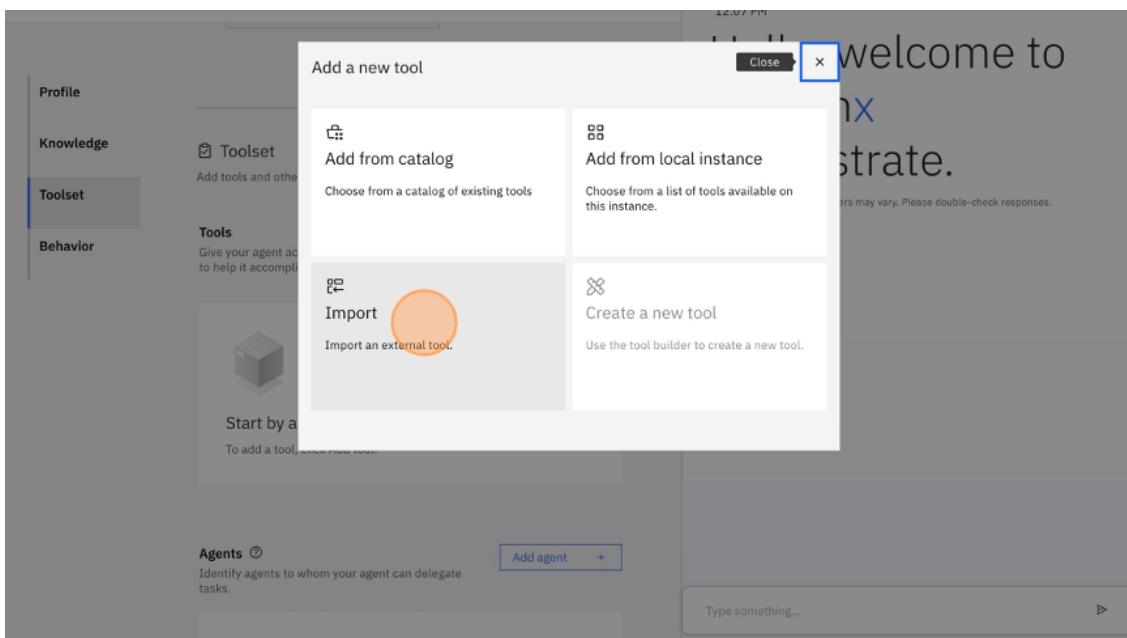
Preview 

12:07 PM

Hello, welcome to **watsonX** Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

1. Select "Import an external tool."

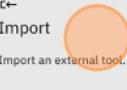


12:07 PM

Add a new tool

Add from catalog
Choose from a catalog of existing tools

Add from local instance
Choose from a list of tools available on this instance.

Import 
Import an external tool.

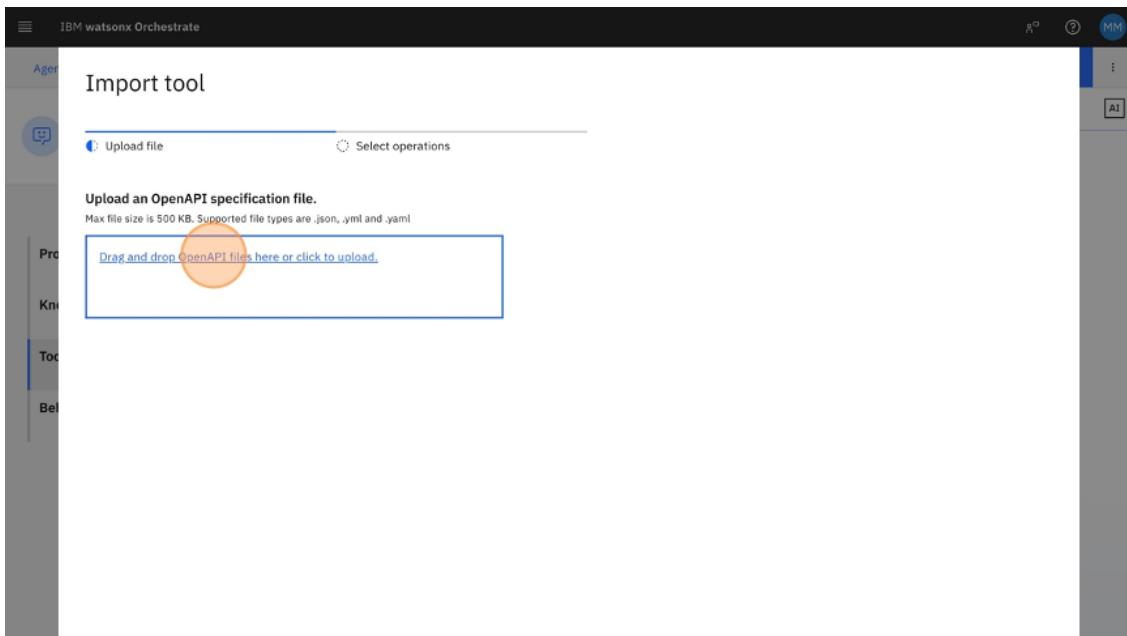
Create a new tool
Use the tool builder to create a new tool.

Agents  Identify agents to whom your agent can delegate tasks.

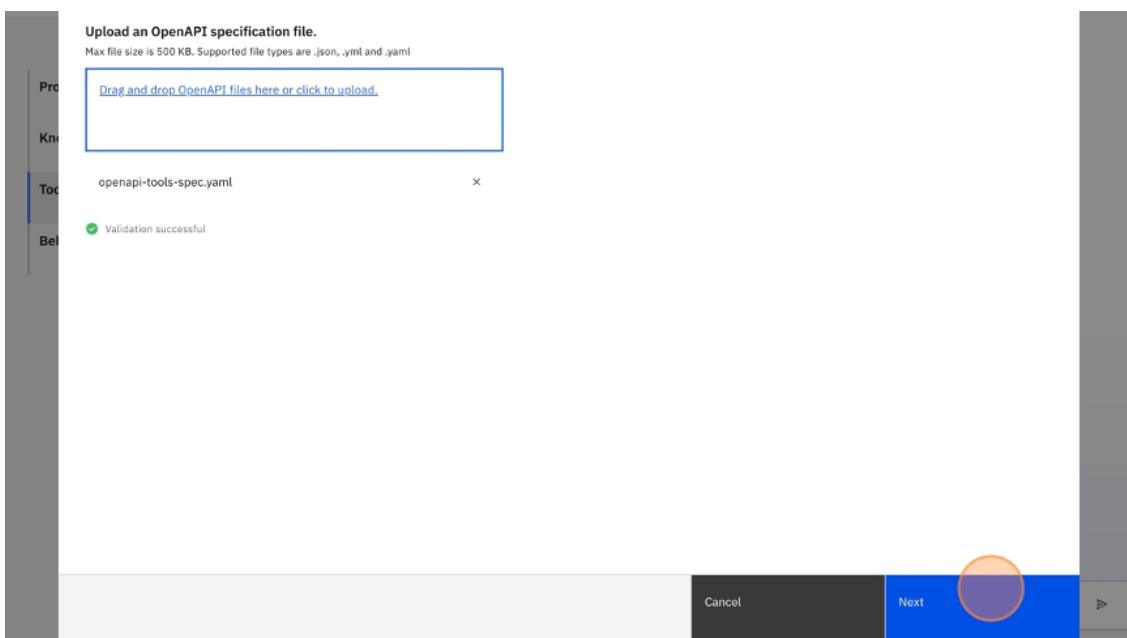
Add agent +

Type something... 

1. Click on the upload area labeled "Drag and drop OpenAPI files here or click to upload."



1. Upload the file containing the OpenAPI specification file: `openapi-tools-spec.json` (Note: `openapi-tools-spec.yaml` is also available if issues are encountered with file uploads)
2. Click "Next"



1. Click "Select all rows in the table" to select all available tools

IBM Watson Orchestrate

Import tool

Operations

Name	Method	Description
<input checked="" type="checkbox"/> This tool enables intelligent analysis and summarization of the historical procedures dataset.	POST	<p>This tool enables intelligent analysis and summarization of the historical procedures dataset. Key Features - Filtering on any combination of columns - Grouping and aggregation of results Dataset Overview Detected columns: <code>member_name</code>: e.g., Alice, Bob, Charlie... <code>relationship</code>: e.g., Mother, Father, Son... <code>age</code>: e.g., 42, 45, 12... <code>gender</code>: e.g., Female, Male - <code>procedure</code>: e.g., Annual Physical Exam, Appendectomy, CT Scan... - <code>procedure_type</code>: e.g., preventive, surgery, diagnostic... <code>location</code>: e.g., City Hospital, Green Valley Clinic, Sunrise Health... - <code>date</code>: e.g., 2024-04-28, 2023-05-02, 2022-05-11... - <code>in_network</code>: e.g., True, False - <code>member_plan</code>: e.g., Gold PPO, Family Plan - Silver EPO - <code>accepted_plans</code>: e.g., Gold PPO, Family Plan - Silver EPO, Medicare Advantage, Gold PPO, Family Plan - Silver EPO, Family Plan - Silver EPO, Medicare Advantage... - <code>cost_facility</code>: e.g., 29.4, 48.02, 30.8... - <code>cost_physician</code>: e.g., 199.09, 189.75, 128.9... - <code>cost_anesthesia</code>: e.g., 0.0, 2024.21, 2257.4... - <code>cost_medication</code>: e.g., 4.19, 5.53, 7.15... - <code>total_cost</code>: e.g., 232.68, 243.3, 166.85... - <code>facility_rating</code>: e.g., 4.7, 4.5, 4.6... - <code>notes</code>: e.g., Annual Physical Exam performed at City Hospital, Appendectomy performed at City Hospital, CT Scan performed at Green Valley Clinic... Example Input: <code>json { "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] } { "filters": [{ "column": "member_name", "operator": "contains", "value": "Ali" }] } { "filters": [{ "column": "member_name", "operator": "ne", "value": "Alice" }] } { "filters": [{ "column": "age", "operator": "gt", "value": 22.69 }] } { "filters": [{ "column": "age", "operator": "lt", "value": 27.73 }] } { "filters": [{ "column": "age", "operator": "le", "value": 25 }] } { "filters": [{ "column": "age", "operator": "ne", "value": 25 }] } { "filters": [{ "column": "age", "operator": "ge", "value": 12.0 }] } { "group_by": ["member_name", "relationship"] } { "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }, { "column": "age", "operator": "ge", "value": 12.0 }] } </code> Example Questions: - "What rows match <code>member_name = Alice</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] }</code> - "What rows do not match <code>member_name = Alice</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "ne", "value": "Alice" }] }</code> - "What rows contain <code>Ali</code> in <code>member_name</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "contains", "value": "Ali" }] }</code> - "What rows contain <code>Alice</code> in <code>member_name</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] }</code> </p>

1. Click "Done"

Operations

Name	Method	Description
<input checked="" type="checkbox"/> This tool enables intelligent analysis and summarization of the historical procedures dataset.	POST	<p>This tool enables intelligent analysis and summarization of the historical procedures dataset. Key Features - Filtering on any combination of columns - Grouping and aggregation of results Dataset Overview Detected columns: <code>member_name</code>: e.g., Alice, Bob, Charlie... <code>relationship</code>: e.g., Mother, Father, Son... <code>age</code>: e.g., 42, 45, 12... <code>gender</code>: e.g., Female, Male - <code>procedure</code>: e.g., Annual Physical Exam, Appendectomy, CT Scan... - <code>procedure_type</code>: e.g., preventive, surgery, diagnostic... <code>location</code>: e.g., City Hospital, Green Valley Clinic, Sunrise Health... - <code>date</code>: e.g., 2024-04-28, 2023-05-02, 2022-05-11... - <code>in_network</code>: e.g., True, False - <code>member_plan</code>: e.g., Gold PPO, Family Plan - Silver EPO - <code>accepted_plans</code>: e.g., Gold PPO, Family Plan - Silver EPO, Medicare Advantage, Gold PPO, Family Plan - Silver EPO, Family Plan - Silver EPO, Medicare Advantage... - <code>cost_facility</code>: e.g., 29.4, 48.02, 30.8... - <code>cost_physician</code>: e.g., 199.09, 189.75, 128.9... - <code>cost_anesthesia</code>: e.g., 0.0, 2024.21, 2257.4... - <code>cost_medication</code>: e.g., 4.19, 5.53, 7.15... - <code>total_cost</code>: e.g., 232.68, 243.3, 166.85... - <code>facility_rating</code>: e.g., 4.7, 4.5, 4.6... - <code>notes</code>: e.g., Annual Physical Exam performed at City Hospital, Appendectomy performed at City Hospital, CT Scan performed at Green Valley Clinic... Example Input: <code>json { "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] } { "filters": [{ "column": "member_name", "operator": "contains", "value": "Ali" }] } { "filters": [{ "column": "member_name", "operator": "ne", "value": "Alice" }] } { "filters": [{ "column": "age", "operator": "gt", "value": 22.69 }] } { "filters": [{ "column": "age", "operator": "lt", "value": 27.73 }] } { "filters": [{ "column": "age", "operator": "le", "value": 25 }] } { "filters": [{ "column": "age", "operator": "ne", "value": 25 }] } { "filters": [{ "column": "age", "operator": "ge", "value": 12.0 }] } { "group_by": ["member_name", "relationship"] } { "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }, { "column": "age", "operator": "ge", "value": 12.0 }] } </code> Example Questions: - "What rows match <code>member_name = Alice</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] }</code> - "What rows do not match <code>member_name = Alice</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "ne", "value": "Alice" }] }</code> - "What rows contain <code>Ali</code> in <code>member_name</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "contains", "value": "Ali" }] }</code> - "What rows contain <code>Alice</code> in <code>member_name</code>?" \rightarrow <code>{ "filters": [{ "column": "member_name", "operator": "equals", "value": "Alice" }] }</code> </p>

4. Deploying and Testing the Agent

1. In the "Type something..." field enter the following and hit enter
Can you give me a cost breakdown for X rays?

Profile

Knowledge

Toolset

Behavior

Toolset

Add tools and other agents to help your agent take action.

Tools

Give your agent access to your organization's tool to help it accomplish tasks.

Add tool

post_historical_procedures_5
This tool enables intelligent analysis and summarization of th...

post_available_procedures_5
This tool enables intelligent analysis and summarization of th...

get_member_insights_5
Returns member data including: - Plan information (medical...

get_schedule_5
Provides appointment scheduling guidelines to help users...

Agents (1)

Type something...

1. Click "Deploy" to activate your AskBenefits agent

IBM WatsonX Orchestrate

Agent chat / Manage agents / AskBenefits

AskBenefits

Profile

Knowledge

Toolset

Add tools and other agents to help your agent take action.

Tools

Give your agent access to your organization's tool to help it accomplish tasks.

Add tool

post_historical_procedures_5
This tool enables intelligent analysis and summarization of th...

post_available_procedures_5
This tool enables intelligent analysis and summarization of th...

get_member_insights_5

Preview

You 12:09 PM

Can you give me a cost breakdown for X rays?

watsonx 12:09 PM | Show Reasoning

The cost breakdown for X-rays is as follows:

- Facility cost: \$11,789.50 (City Hospital), \$6,282.11 (Regional Medical Center), \$11,093.10 (Green Valley Clinic), \$20,032.20 (Oceanview Medical)
- Physician cost: \$8,169.81 (City Hospital), \$5,478.68 (Regional Medical Center), \$4,648.55 (Green Valley Clinic), \$10,423.70 (Oceanview Medical)
- Anesthesia cost: \$4,036.06 (City Hospital), \$4,498.38 (Regional Medical Center), \$3,684.19 (Green Valley Clinic), \$3,373.14 (Oceanview Medical)
- Medication cost: \$449.00 (City Hospital), \$2,134.35 (Regional Medical Center), \$598.84 (Green Valley Clinic), \$1,101.05 (Oceanview Medical)
- Total cost: \$24,444.30 (City Hospital), \$18,393.50 (Regional Medical Center), \$20,024.70 (Green Valley Clinic), \$34,930.20 (Oceanview Medical)

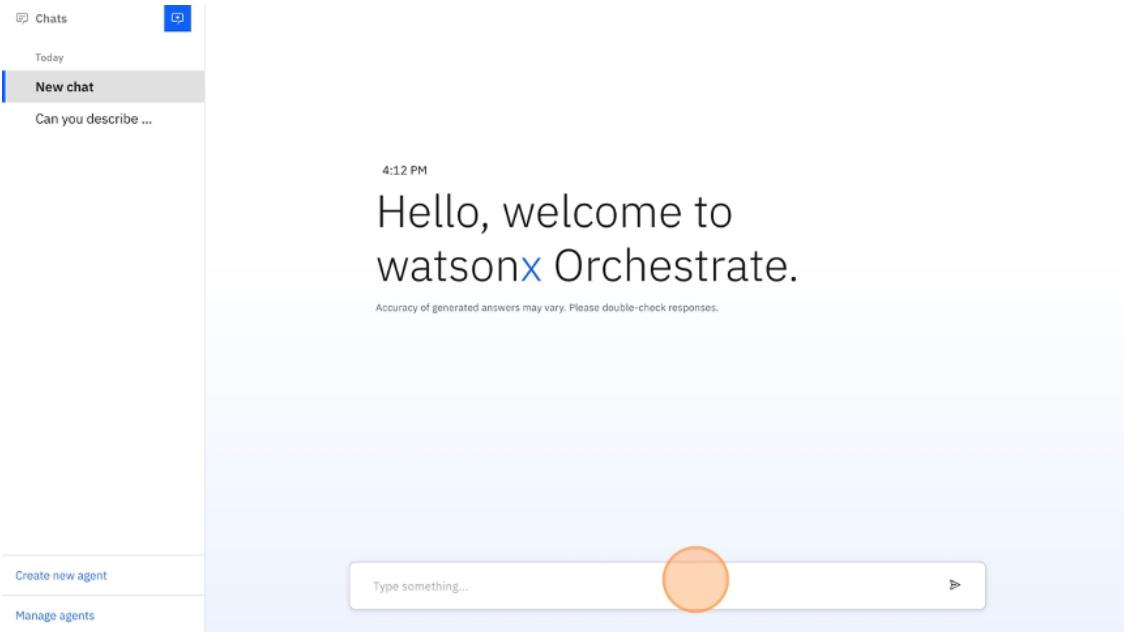
1. Click on the menu icon in the top left corner

1. Click on "Chat"

AskDental Step-by-Step Instructions

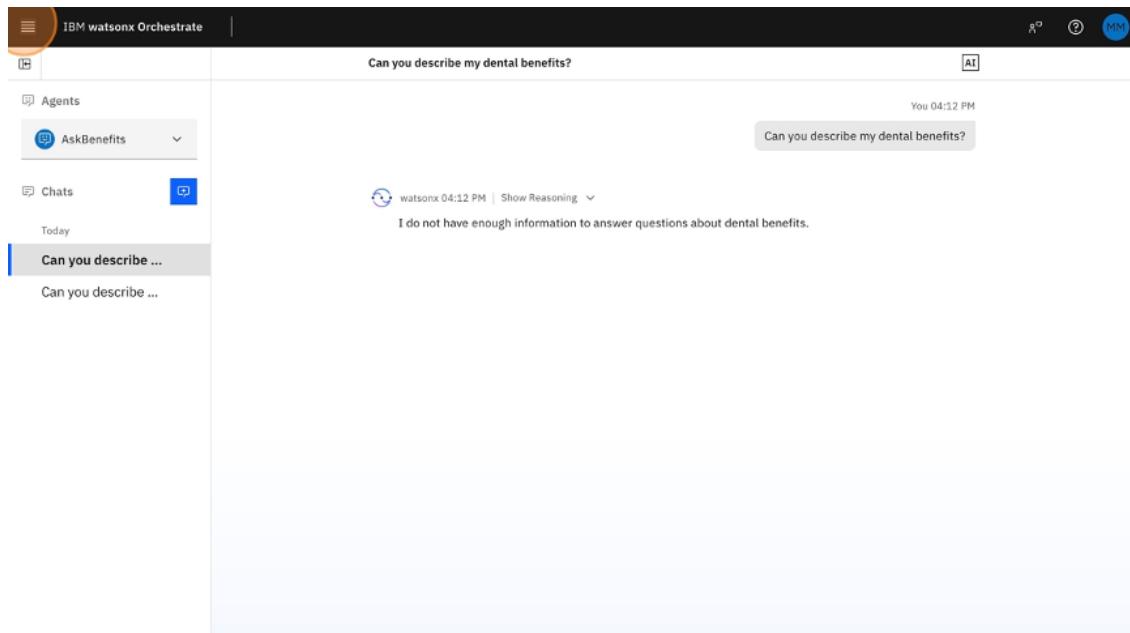
1. Identifying Knowledge Gaps

1. In the "Type something..." field enter the following and hit enter
Can you describe my dental benefits?

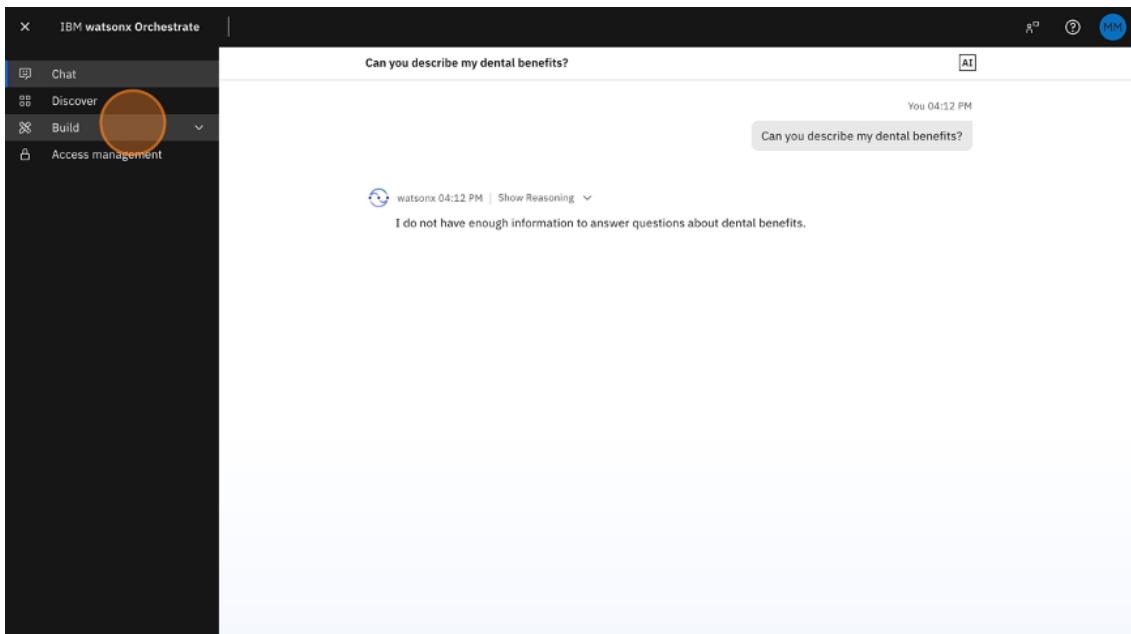


2. Creating a New Collaborator Agent

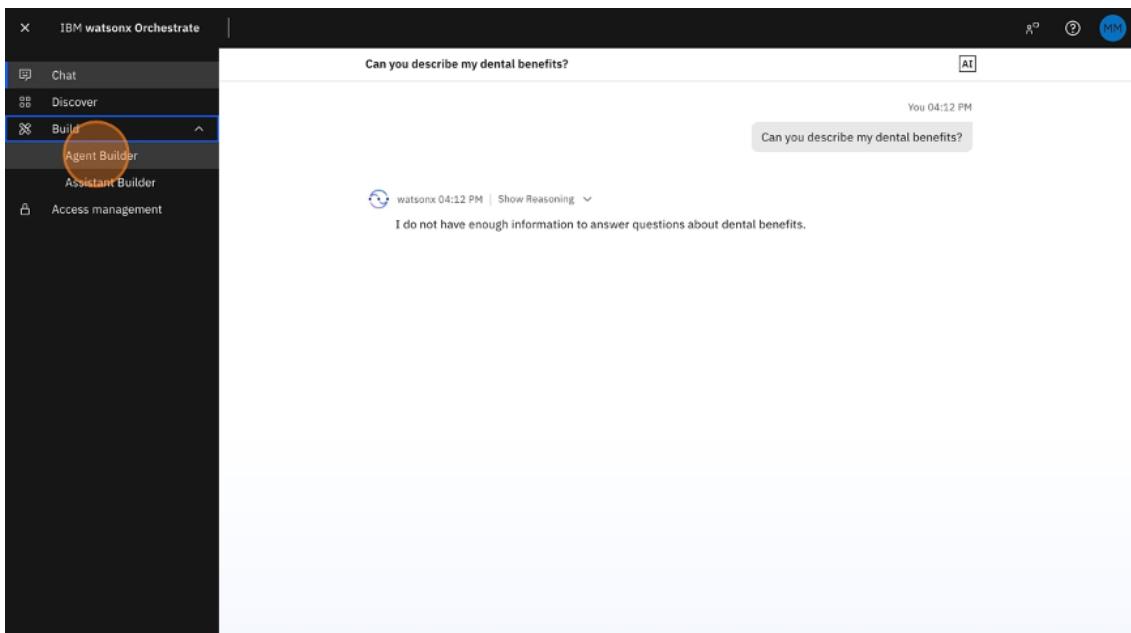
1. Click on the hamburger menu icon in the top left



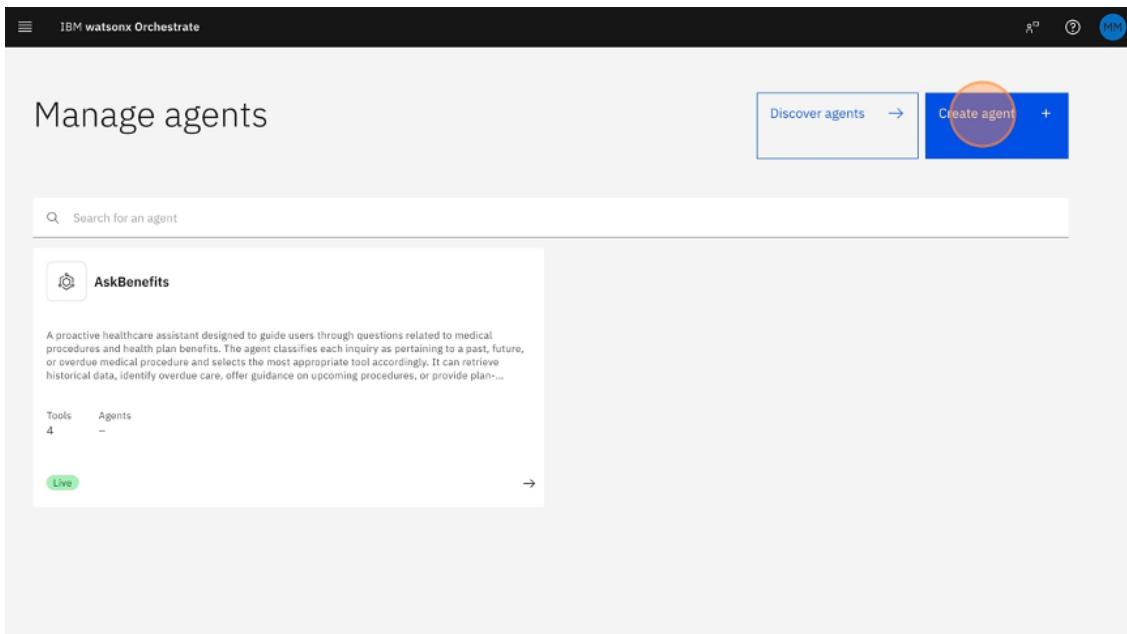
1. Click on "Build"



1. Select "Agent Builder"



1. Click "Create agent"



Manage agents

Discover agents → Create agent +

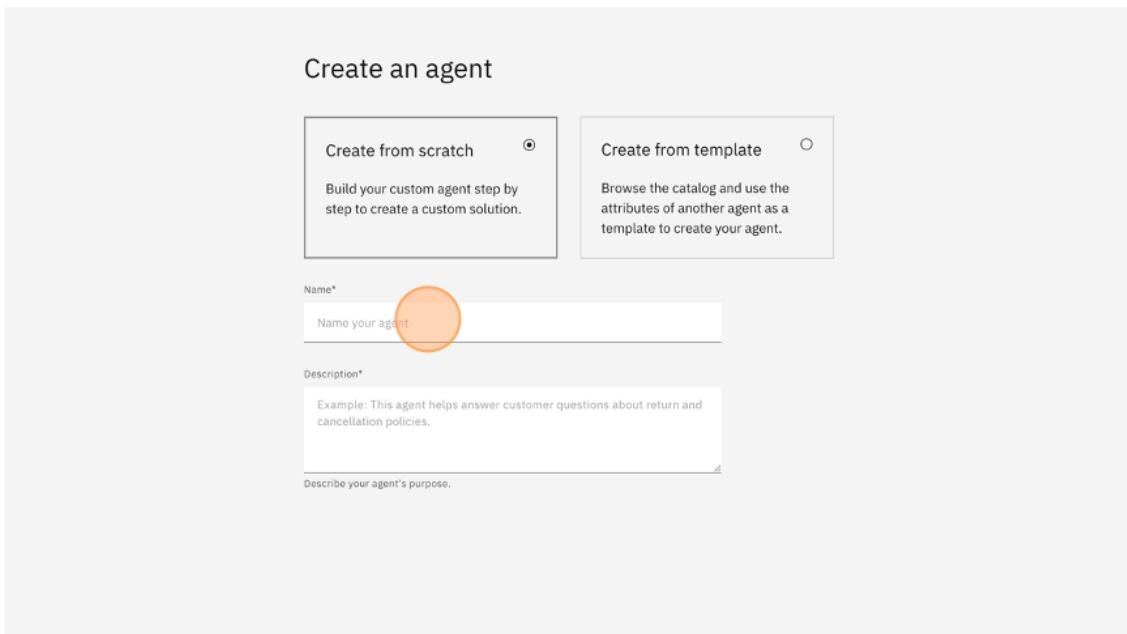
AskBenefits

A proactive healthcare assistant designed to guide users through questions related to medical procedures and health plan benefits. The agent classifies each inquiry as pertaining to a past, future, or overdue medical procedure and selects the most appropriate tool accordingly. It can retrieve historical data, identify overdue care, offer guidance on upcoming procedures, or provide plan-...

Tools 4 Agents -

Live →

1. In the "Name*" field, enter: AskDental



Create an agent

Create from scratch Build your custom agent step by step to create a custom solution.

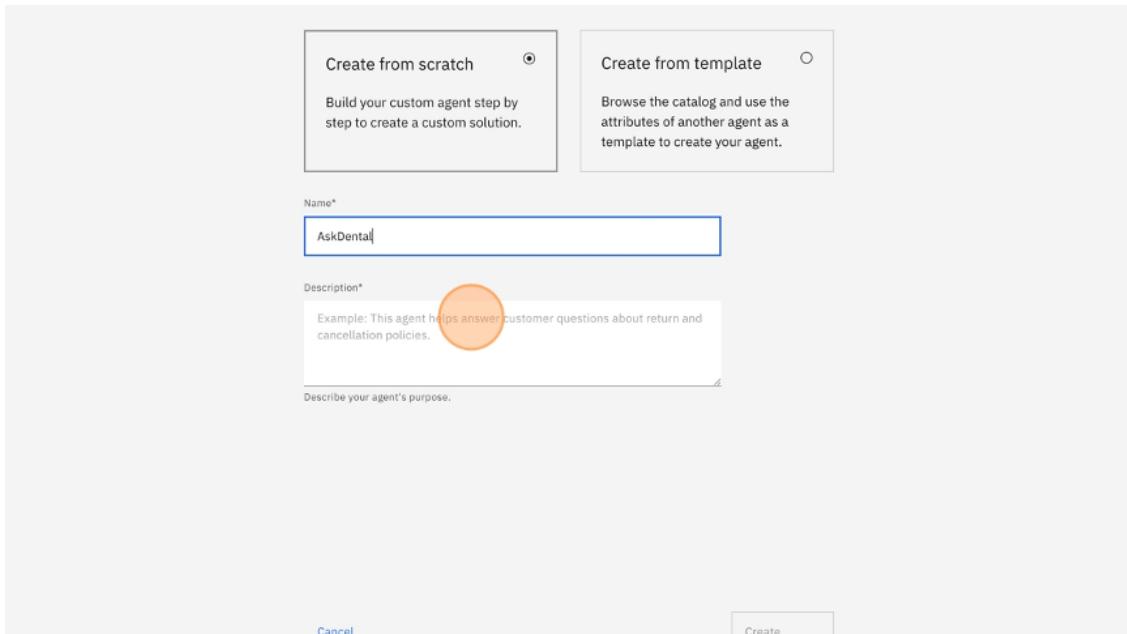
Create from template Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*
Name your agent

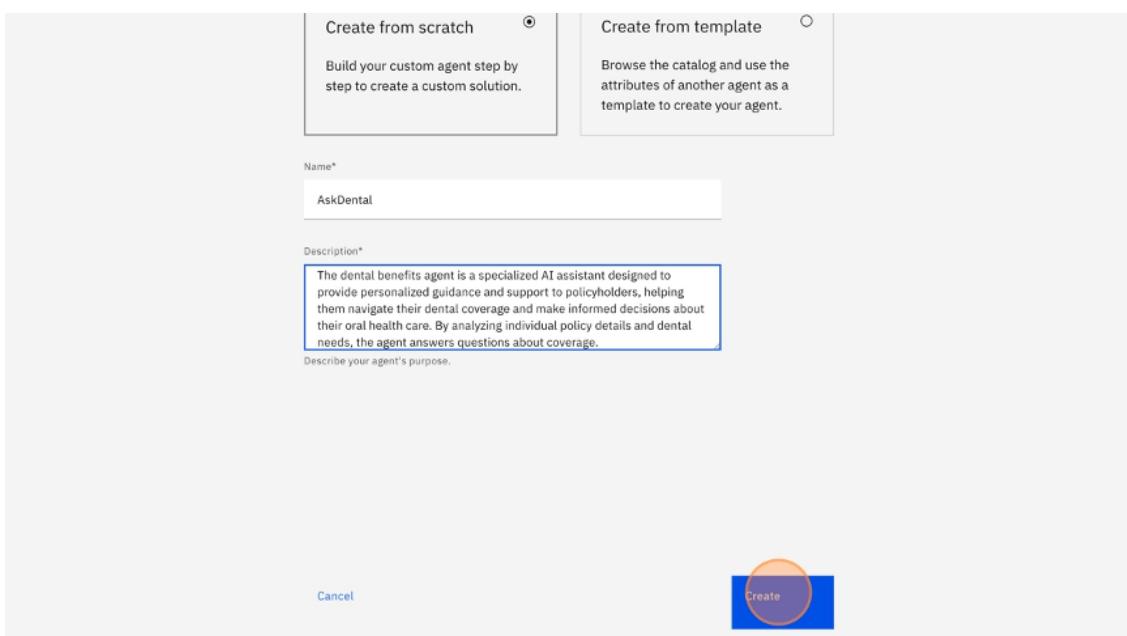
Description*
Example: This agent helps answer customer questions about return and cancellation policies.

Describe your agent's purpose.

1. In the "Description*" field, enter: The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their dental coverage and make informed decisions about their oral health care. By analyzing individual policy details and dental needs, the agent answers questions about coverage.

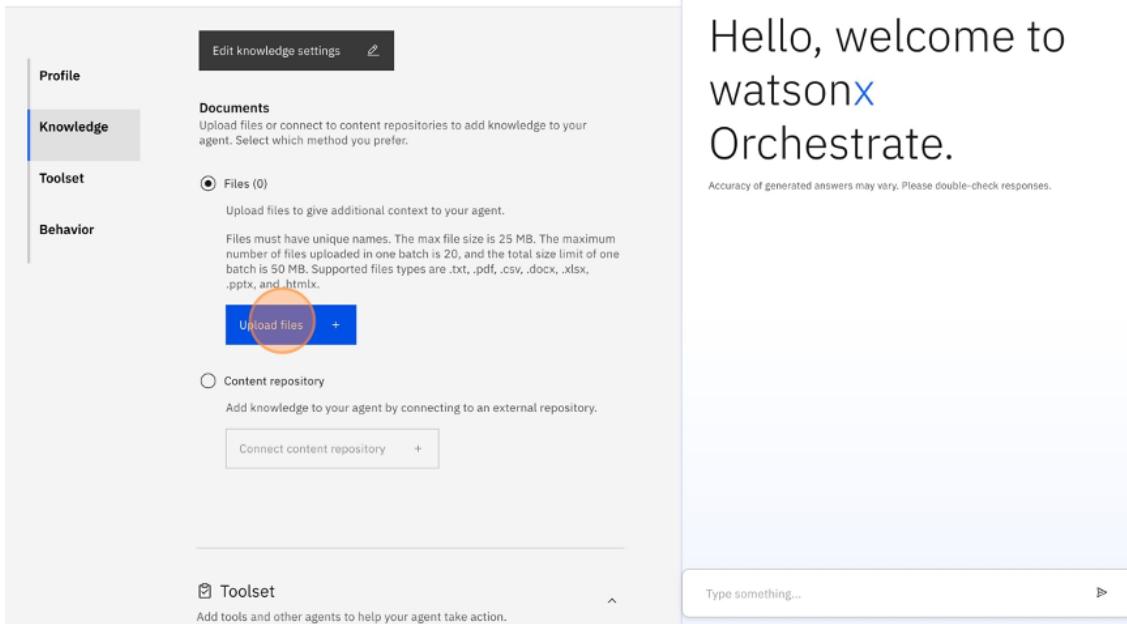


1. Click "Create" to initialize your agent



3. Importing and Exposing Knowledge Documents

1. Click "Upload files" under "Knowledge"



Profile

Knowledge

Toolset

Behavior

Edit knowledge settings 

Documents
Upload files or connect to content repositories to add knowledge to your agent. Select which method you prefer.

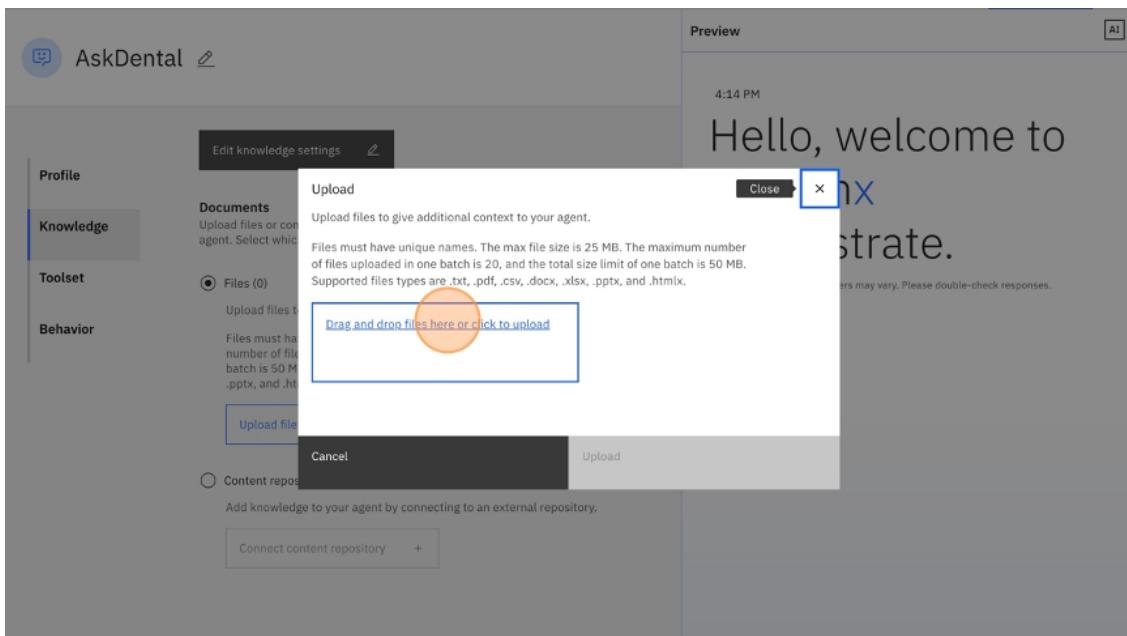
Files (0)
Upload files to give additional context to your agent.
Files must have unique names. The max file size is 25 MB. The maximum number of files uploaded in one batch is 20, and the total size limit of one batch is 50 MB. Supported files types are .txt, .pdf, .csv, .docx, .xlsx, .pptx, and .htmlix.
Upload files 

Content repository
Add knowledge to your agent by connecting to an external repository.
Connect content repository 

Toolset 

Type something... 

1. Upload the file containing Dental Benefit information: dental_benefits_summary.pdf



AskDental 

Profile

Knowledge

Toolset

Behavior

Edit knowledge settings 

Documents
Upload files or connect to content repositories to add knowledge to your agent. Select which method you prefer.

Files (0)
Upload files to give additional context to your agent.
Files must have unique names. The max file size is 25 MB. The maximum number of files uploaded in one batch is 20, and the total size limit of one batch is 50 MB. Supported files types are .txt, .pdf, .csv, .docx, .xlsx, .pptx, and .htmlix.
Upload files 

Content repository
Add knowledge to your agent by connecting to an external repository.
Connect content repository 

Upload
Upload files to give additional context to your agent.
Files must have unique names. The max file size is 25 MB. The maximum number of files uploaded in one batch is 20, and the total size limit of one batch is 50 MB. Supported files types are .txt, .pdf, .csv, .docx, .xlsx, .pptx, and .htmlix.
Drag and drop files here or click to upload 

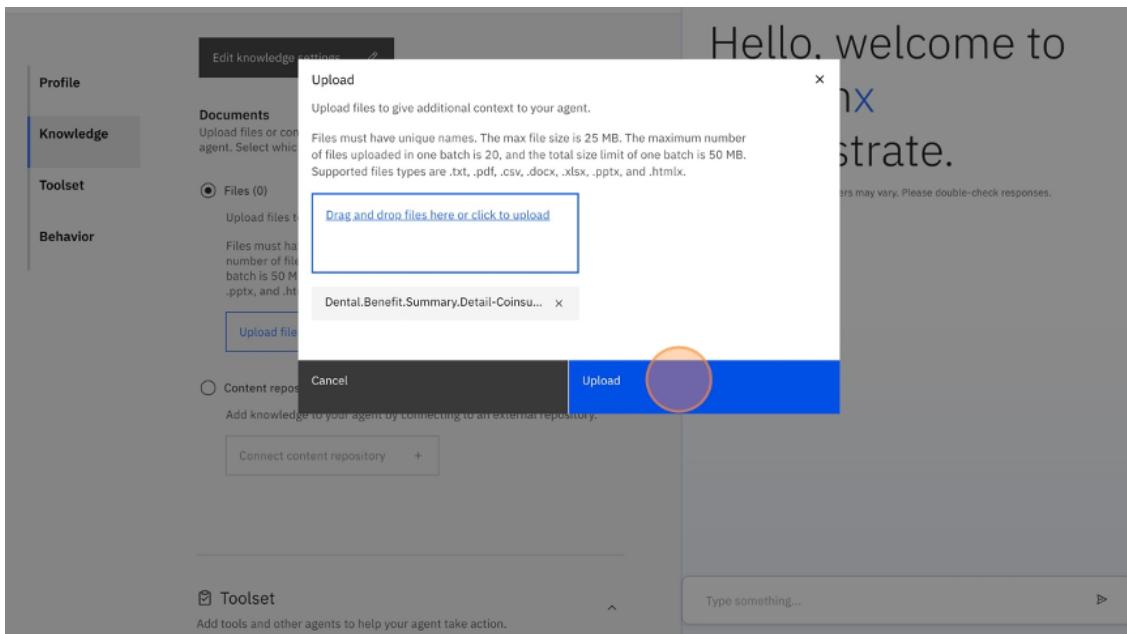
Close  **X**

Preview 

4:14 PM

Hello, welcome to watsonX Orchestrate.

1. Click "Upload"



1. In the Knowledge Description field with "Example: This knowledge addresses all order-related inquiries. Customers can seek guidance on order status, shipping details, return policies, product availability, and refund processes." enter: This knowledge file explains dental benefits and can be used to answer questions to policyholders. Contains information about individual policy details and coverage. If the answer to the question is not contained in your knowledge base, instead of responding you should initiate a transfer to the supervisor agent, copying the users query verbatim.

AskDental

Profile

Knowledge

Provide the specific knowledge your agent needs to accomplish its goal.

Importance of descriptions

A clear and detailed knowledge description is required for the agent to understand when to use the knowledge—leading to more accurate and relevant responses for users.

Description

Example: This knowledge addresses all order-related inquiries. Customers can seek guidance on order status, shipping details, return policies, product availability, and refund processes.

This description will inform the agent on the contents of the knowledge.

Edit knowledge settings

Documents

Upload files or connect to content repositories to add knowledge to your agent. Select which method you prefer.

Files (1)

Upload files to give additional context to your agent.

4:15 PM

Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

1. Click "Deploy"

IBM WatsonX Orchestrate

Agent chat / Manage agents / AskDental

AskDental

Profile

Knowledge

Toolset

Behavior

Knowledge

Provide the specific knowledge your agent needs to accomplish its goal.

Importance of descriptions

A clear and detailed knowledge description is required for the agent to understand when to use the knowledge—leading to more accurate and relevant responses for users.

Description

This knowledge file explains dental benefits and can be used to answer questions to policyholders. Contains information about individual policy details and coverage.

This description will inform the agent on the contents of the knowledge.

Edit knowledge settings

Documents

Upload files or connect to content repositories to add knowledge to your

Preview

4:15 PM

Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

Deploy

AI

4. Integrating AskDental as a Collaborator

1. Click on the hamburger menu icon in the top left

IBM WatsonX Orchestrate

Agent chat / Manage agents / AskDental

AskDental

Profile

Knowledge

Toolset

Behavior

Knowledge

Provide the specific knowledge your agent needs to accomplish its goal.

Importance of descriptions

A clear and detailed knowledge description is required for the agent to understand when to use the knowledge—leading to more accurate and relevant responses for users.

Description

This knowledge file explains dental benefits and can be used to answer questions to policyholders. Contains information about individual policy details and coverage.

This description will inform the agent on the contents of the knowledge.

Edit knowledge settings

Documents

Upload files or connect to content repositories to add knowledge to your

Preview

4:15 PM

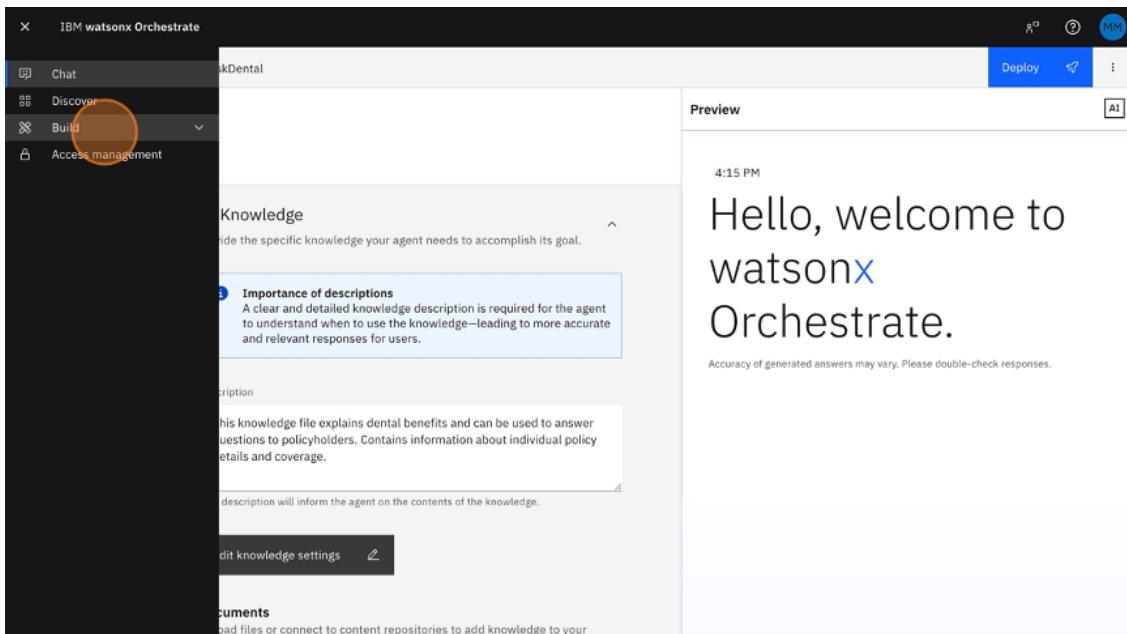
Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

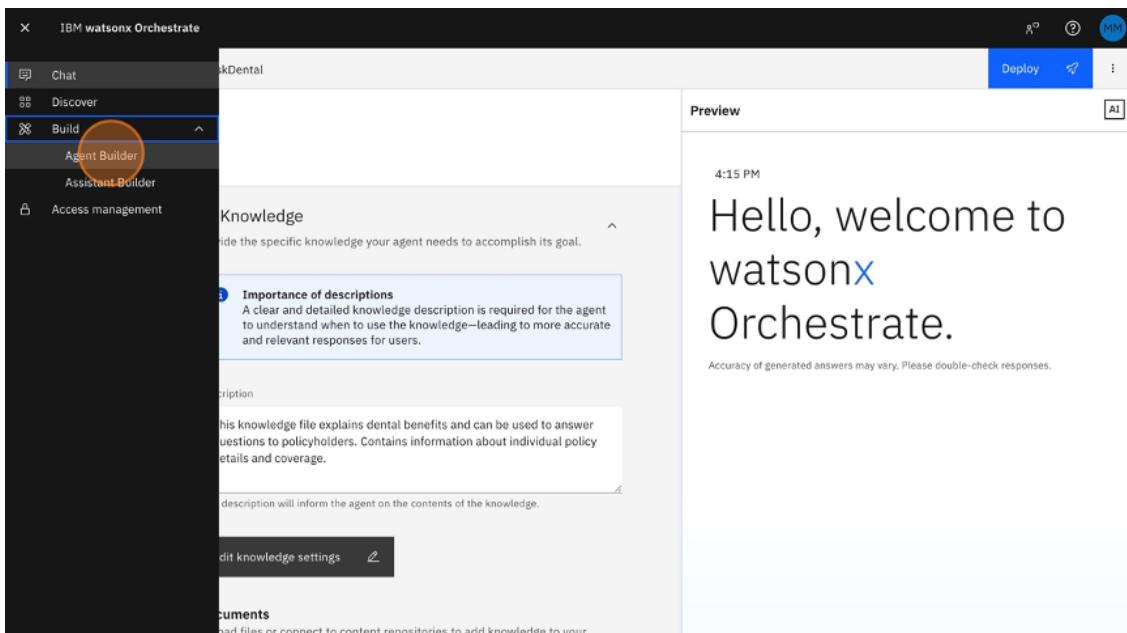
Build

AI

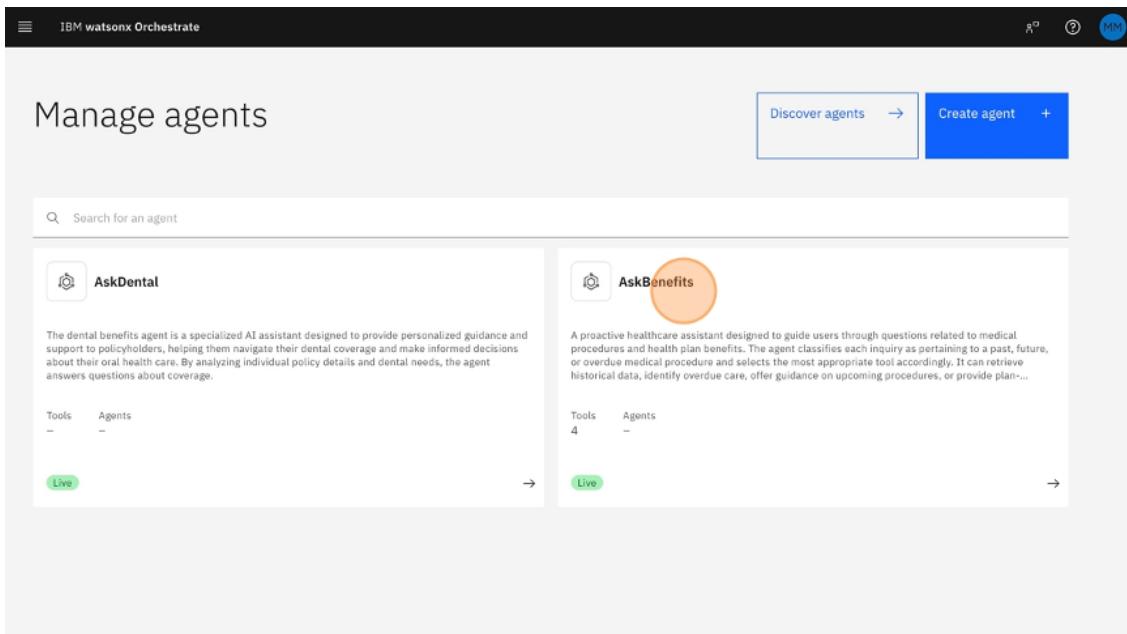
1. Click on “Build”



1. Select "Agent Builder"



1. Select "AskBenefits"



Manage agents

Discover agents → Create agent +

Search for an agent

AskDental

The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their dental coverage and make informed decisions about their oral health care. By analyzing individual policy details and dental needs, the agent answers questions about coverage.

Tools 4 Agents 0

Live →

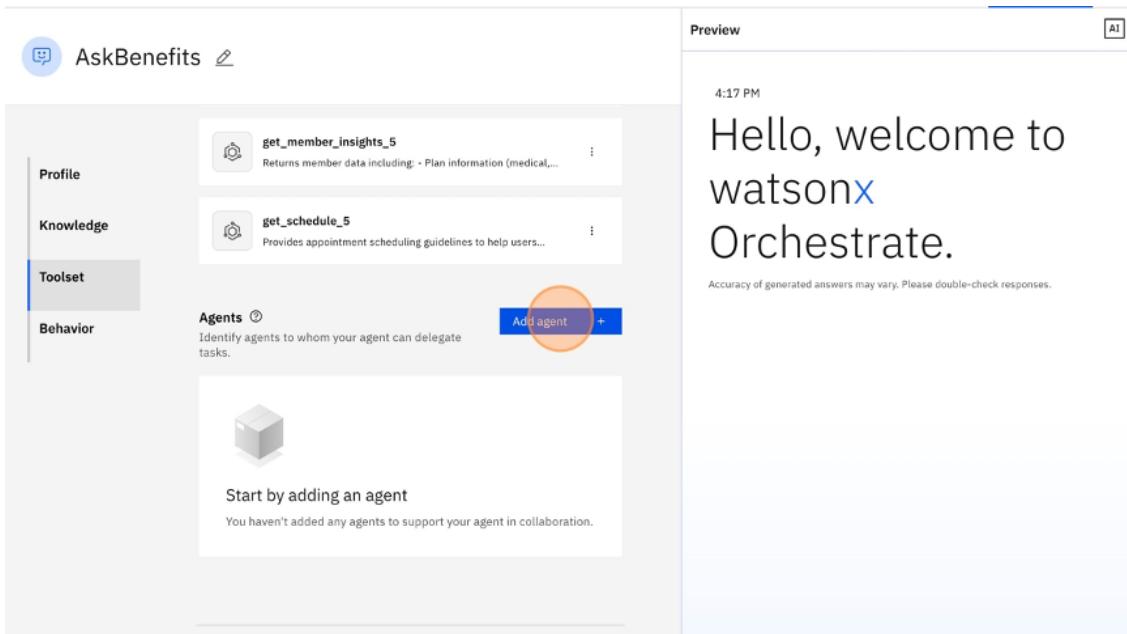
AskBenefits

A proactive healthcare assistant designed to guide users through questions related to medical procedures and health plan benefits. The agent classifies each inquiry as pertaining to a past, future, or overdue medical procedure and selects the most appropriate tool accordingly. It can retrieve historical data, identify overdue care, offer guidance on upcoming procedures, or provide plan...

Tools 4 Agents 0

Live →

1. Click "Add Agent" under "Agents"



AskBenefits

Profile

Knowledge

Toolset

Behavior

get_member_insights_5

get_schedule_5

Agents 1

Add agent +

Start by adding an agent

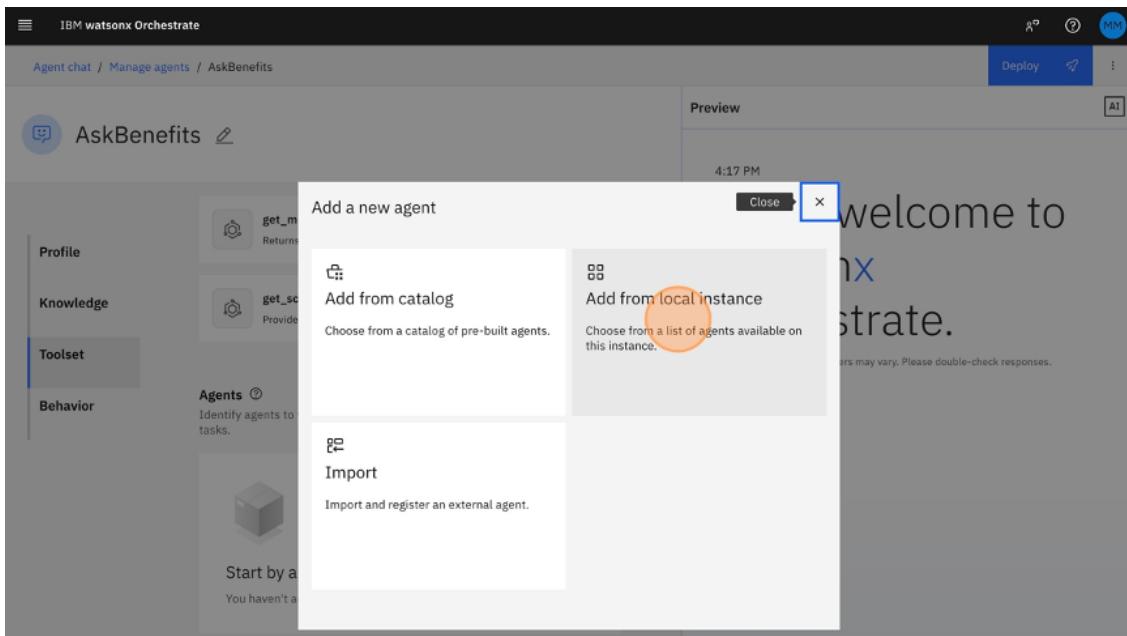
Preview

4:17 PM

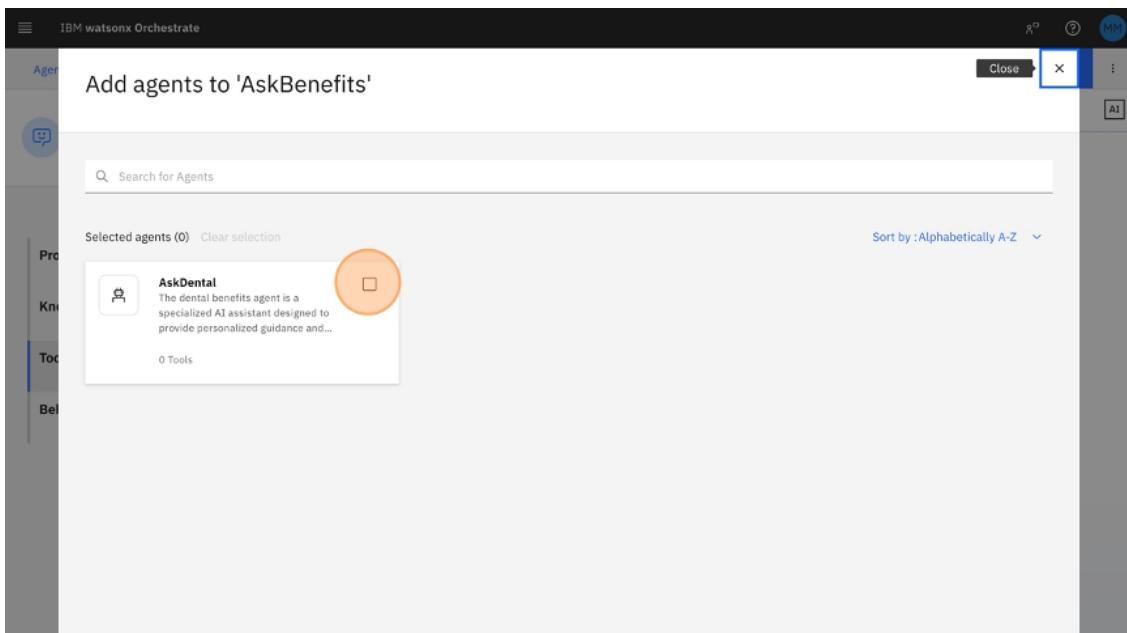
Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

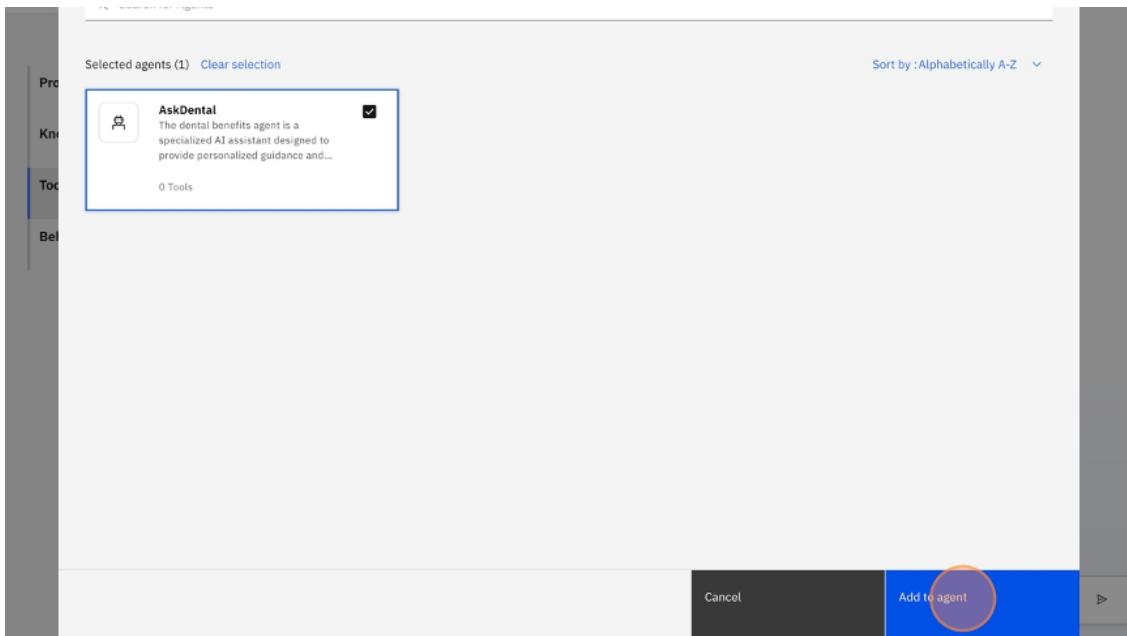
1. Select "Add from local instance"



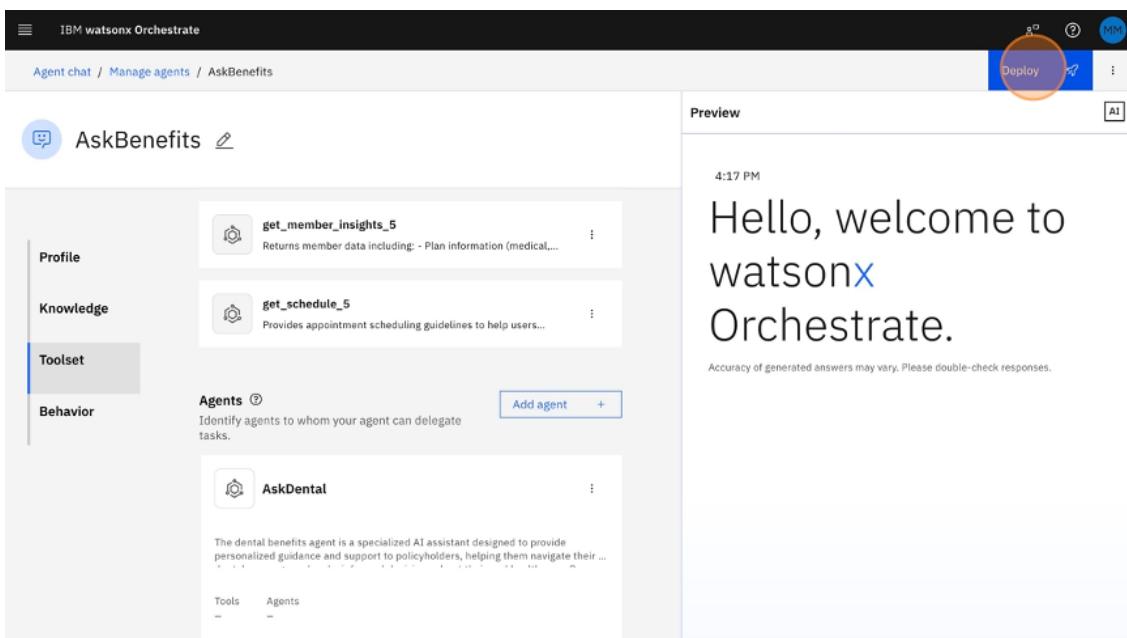
1. Select "AskDental"



1. Click "Add to agent"



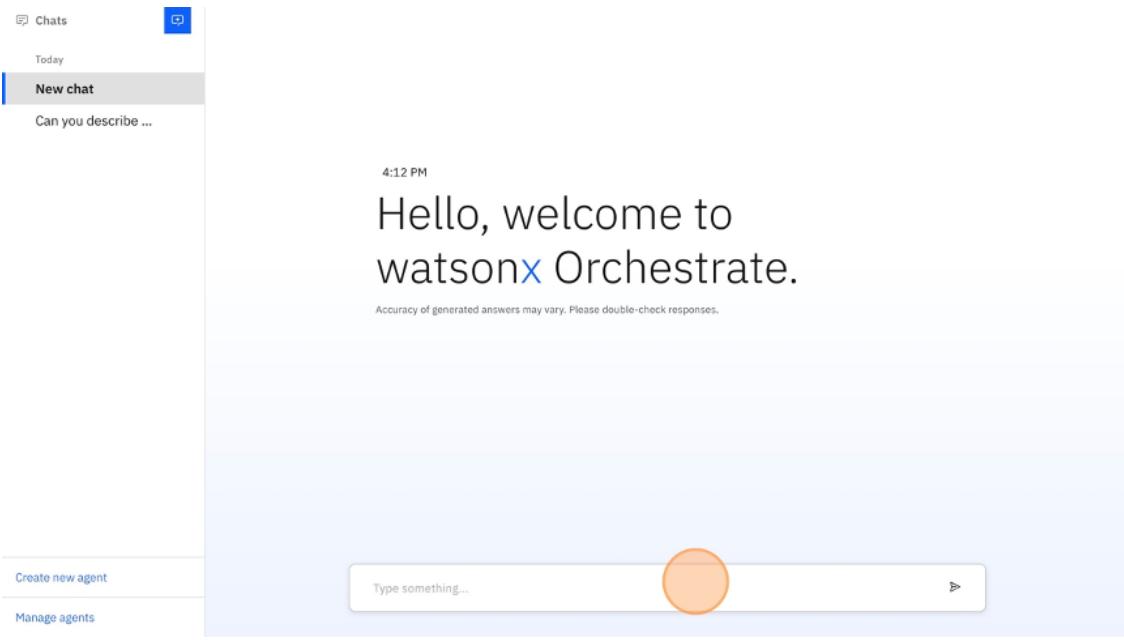
1. Click "Deploy"



1. Click on the menu icon in the top left corner

1. Click on "Chat"

1. In the "Type something..." field enter the following and hit enter Can you describe my dental benefits?



Testing Scenarios

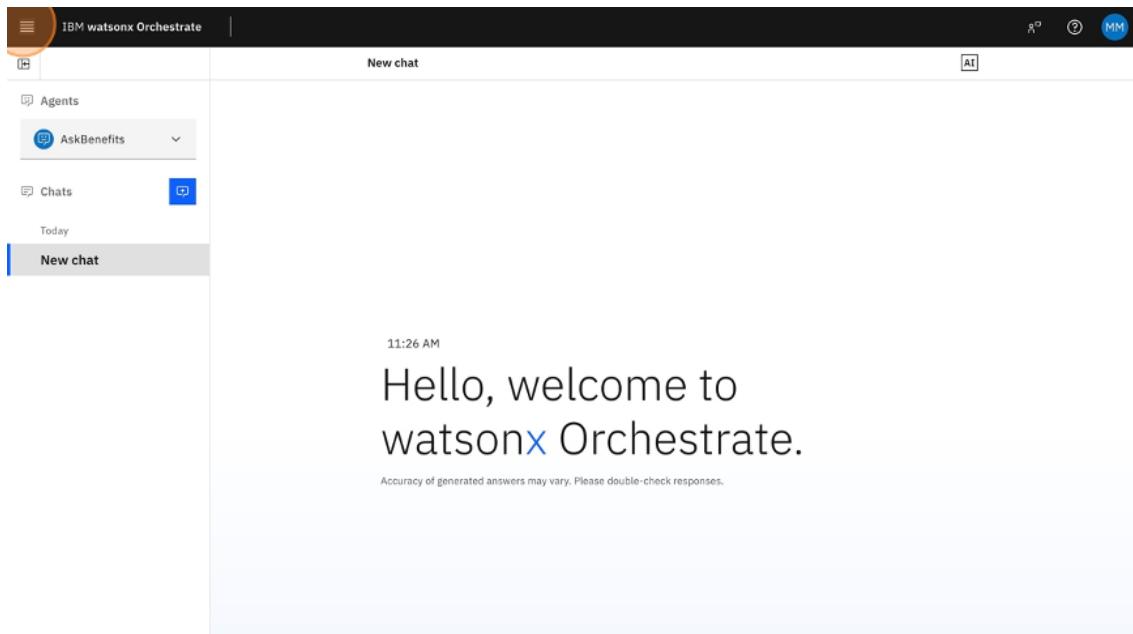
After successful deployment, test the AskBenefits agent with the following sample prompts to verify functionality across different healthcare scenarios:

- 1. Procedure Cost Breakdown:** Can you give me a cost breakdown for X rays?
- 2. Historical Procedure Review:** What procedures have we had at City Hospital in the last year?
- 3. Preventive Care Alerts:** Are we overdue for any procedures?
- 4. Appointment Scheduling:** Can you schedule an appointment for next Thursday at 10 AM?
- 5. Document Access:** Thanks, how do I access my 1095 form again?
- 6. Dental Document Question Answering:** Can you describe my dental benefits?

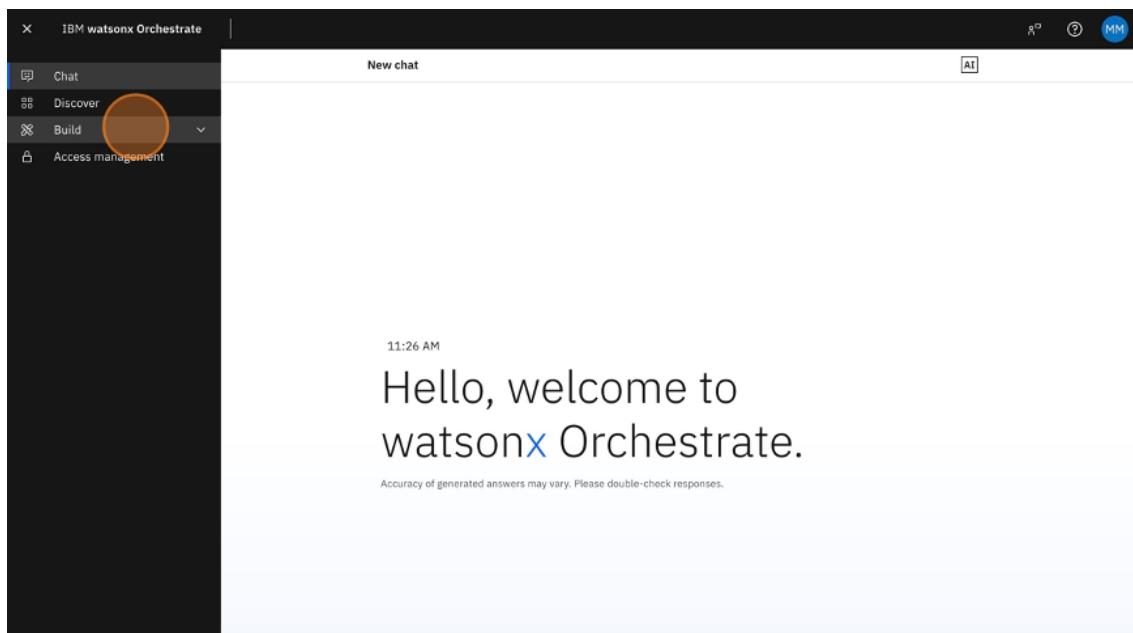
Incorporating a WatsonX Assistant

1. Creating a new WatsonX Assistant

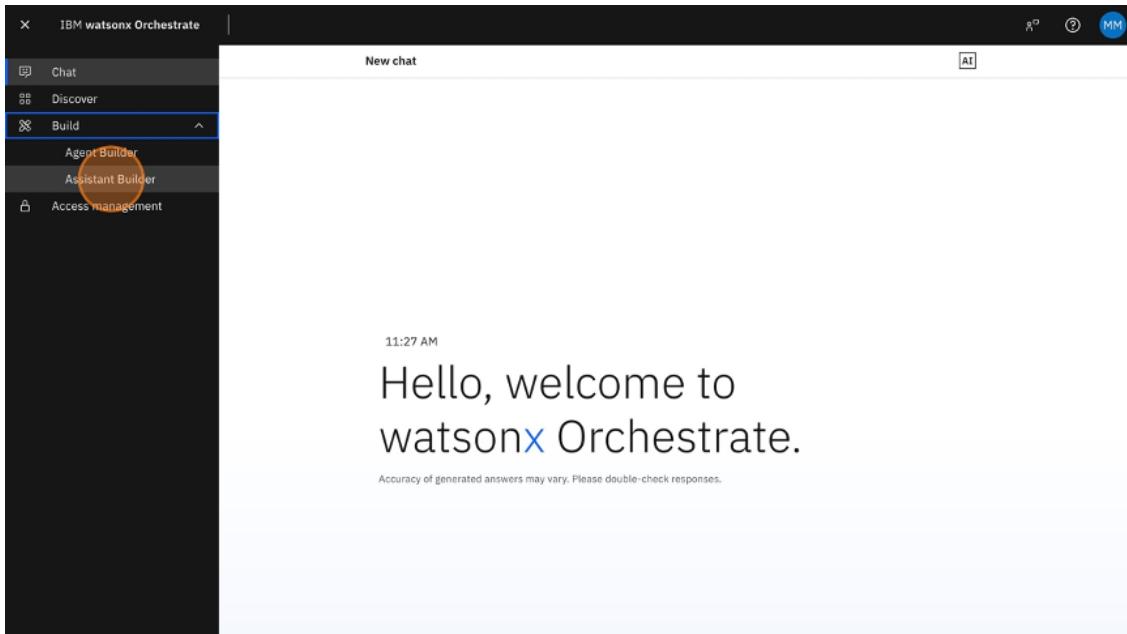
1. Click on the hamburger menu icon in the top left



1. Click on "Build"



1. Click on "Assistant Builder"



1. In the "Assistant Name" field enter Main Desk Concierge

Welcome to AI assistant builder

A screenshot of the 'Create your first assistant' form. At the top, there are four buttons: 'Create' (highlighted with a red circle), 'Personalize', 'Customize', and 'Preview'. To the right is a dark overlay with a checkbox for 'Don't remind me again.' and buttons for 'Install Desktop App' and 'Dismiss'. The main form fields are: 'Assistant name' (placeholder 'Example: Banking Bot'), 'Description (optional)' (placeholder 'Add a description for this assistant'), and 'Assistant language' (dropdown menu set to 'English (US)').

Welcome to AI assistant builder

Assistant name

Example: Banking Bot

Your assistant name will be kept internally and not visible to your customers

Description (optional)

Add a description for this assistant

Assistant language

English (US)

2. Click on "Next"

IBM Watson Orchestrate | AI assistant builder

Welcome to AI assistant builder

Create Personalize Customize Preview

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: Main Desk Concierge

Description (optional): Add a description for this assistant

Assistant language: English (US)

Next

1. Select the "Web" option.

Welcome to AI assistant builder

Create Personalize Customize Preview

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? Web

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in? Choose an option

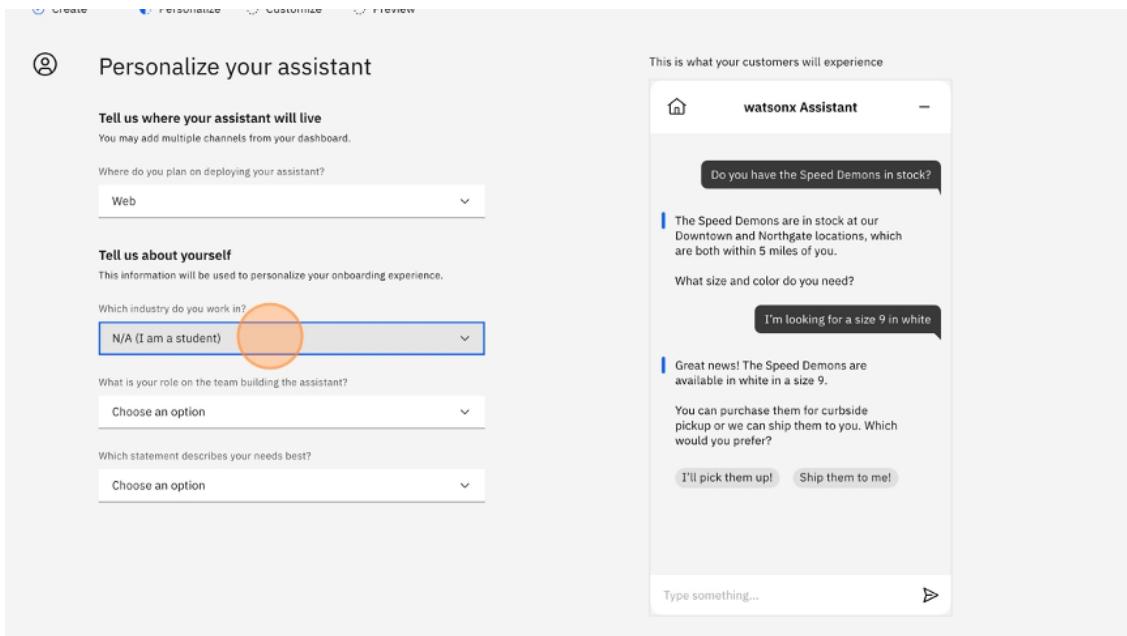
What is your role on the team building the assistant? Choose an option

Which statement describes your needs best? Choose an option

This is what your customers will experience
Select a deployment choice to see what your customers experience

Back **Next**

1. Select the "N/A (I am a student)" option.



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?
Web

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in?
N/A (I am a student)

What is your role on the team building the assistant?
Choose an option

Which statement describes your needs best?
Choose an option

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

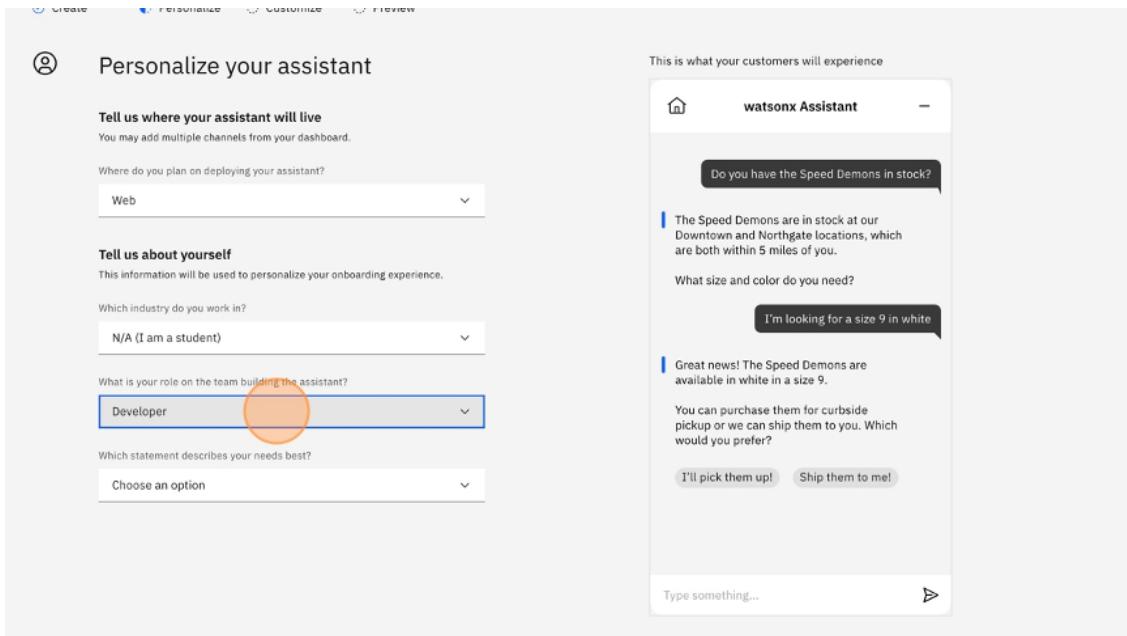
Great news! The Speed Demons are available in white in a size 9.

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... ➤

1. Select the “Developer” option.



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?
Web

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in?
Developer

What is your role on the team building the assistant?
Choose an option

Which statement describes your needs best?
Choose an option

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... ➤

1. Select the “I’m using the product to complete a course or certification” option.

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... ➤

1. Click on "Next"

Welcome to AI assistant builder

Back Next

Create Personalize Customize Preview

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?

1. Type "Main Desk Concierge"

Welcome to AI assistant builder

Back Next

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

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 Secondary color

Chat header User message bubble

Accent color

Add an avatar image 

Assistant

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

Restart conversation 

1. Click on "Next"

IBM Watsonx Orchestrate | AI assistant builder

Welcome to AI assistant builder

Back Next

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

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 Secondary color

Chat header User message bubble

Accent color

Add an avatar image 

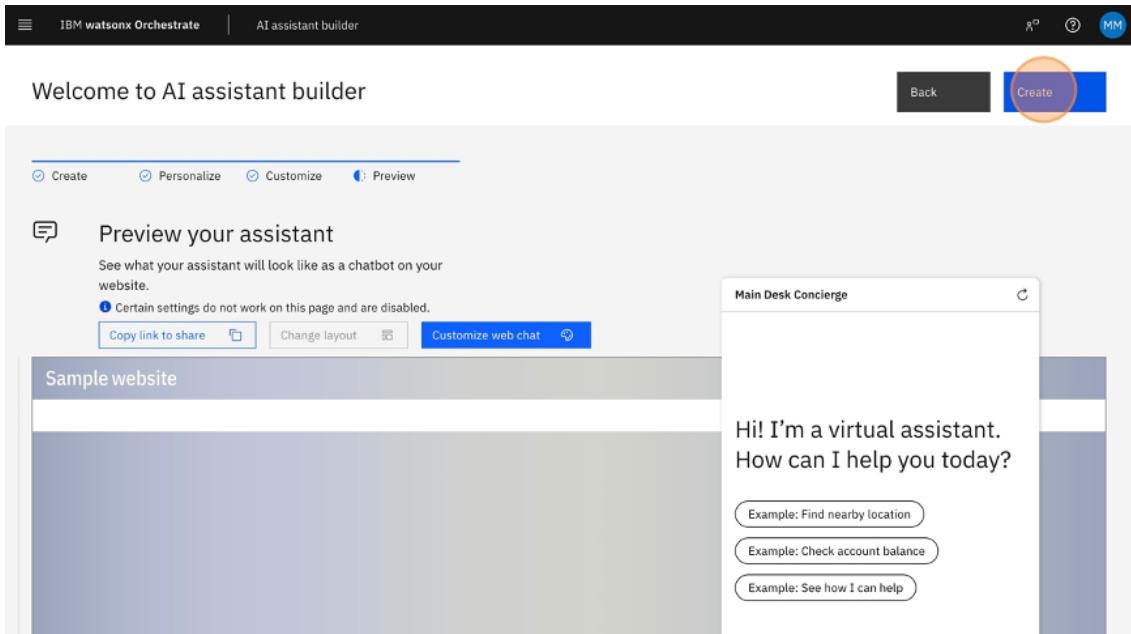
Main Desk Concierge

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

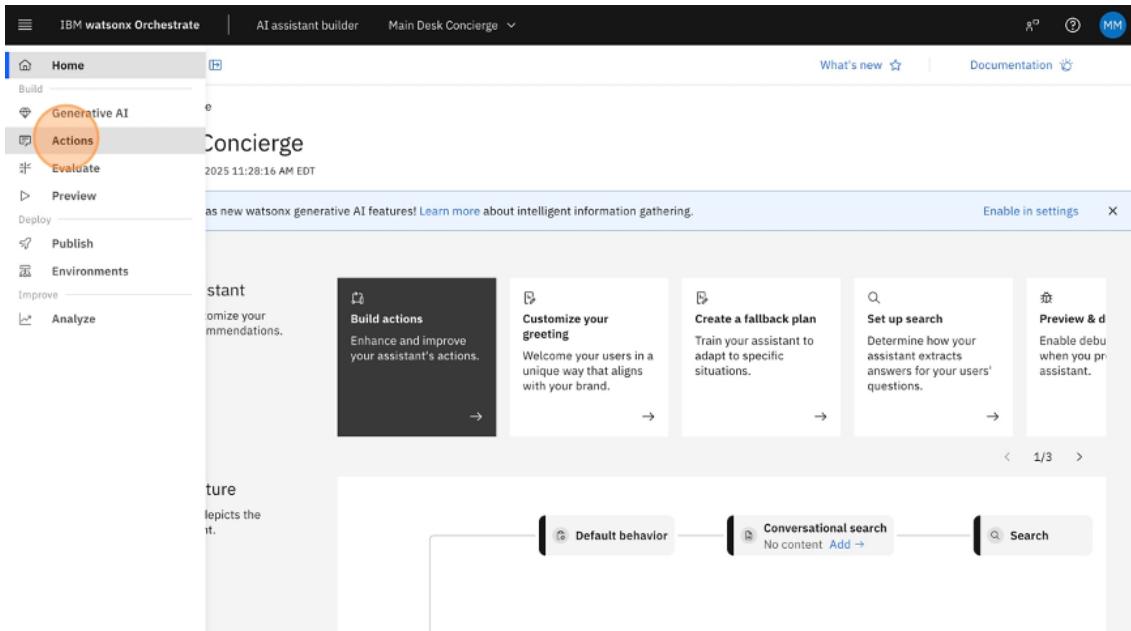
Restart conversation 

1. Click "Create"

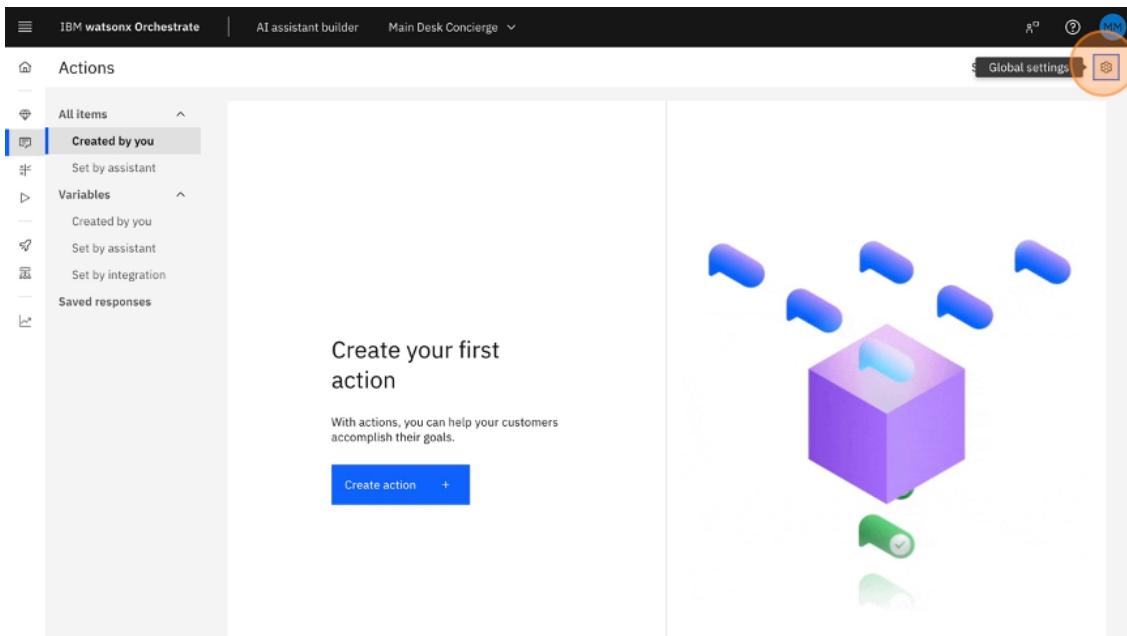


2. Importing the Pre-Made Action

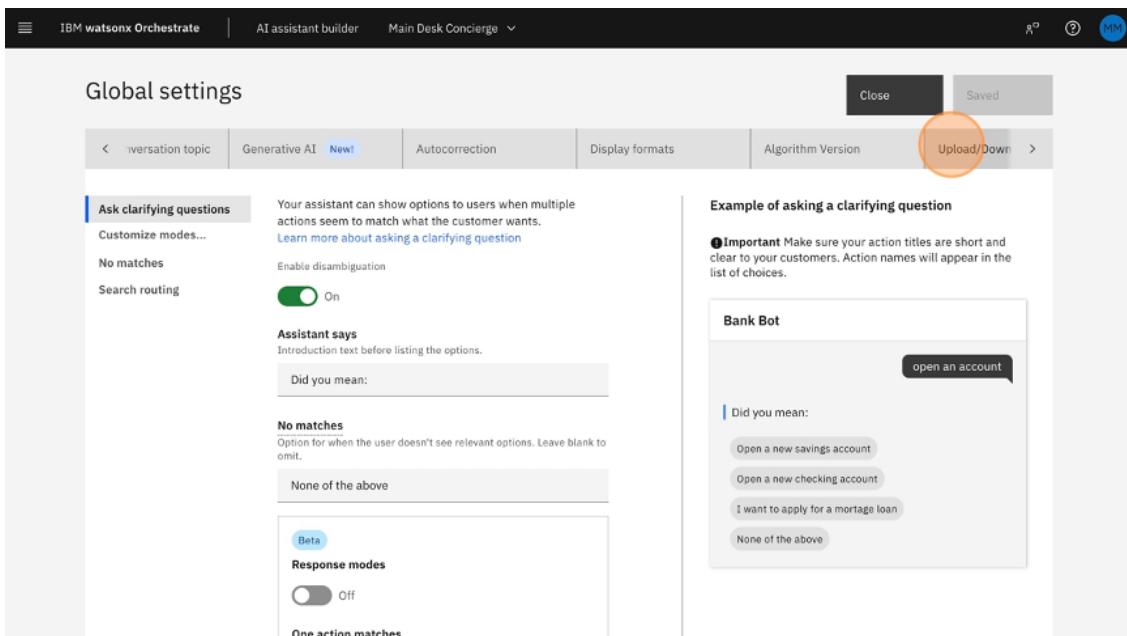
1. Click "Actions"



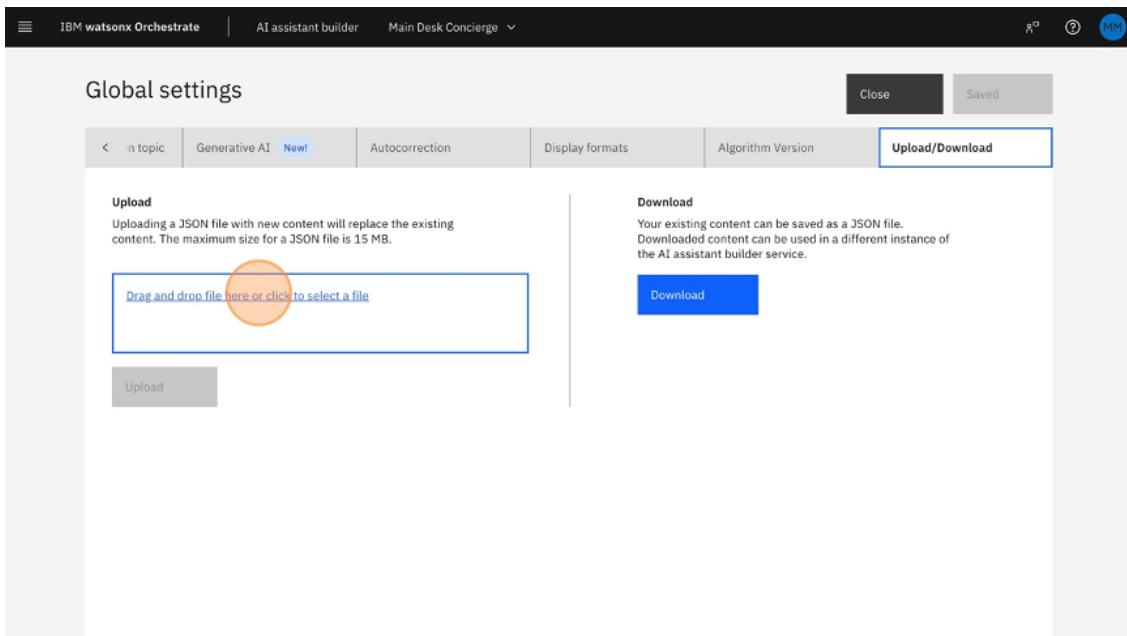
1. Click on "Global Settings"



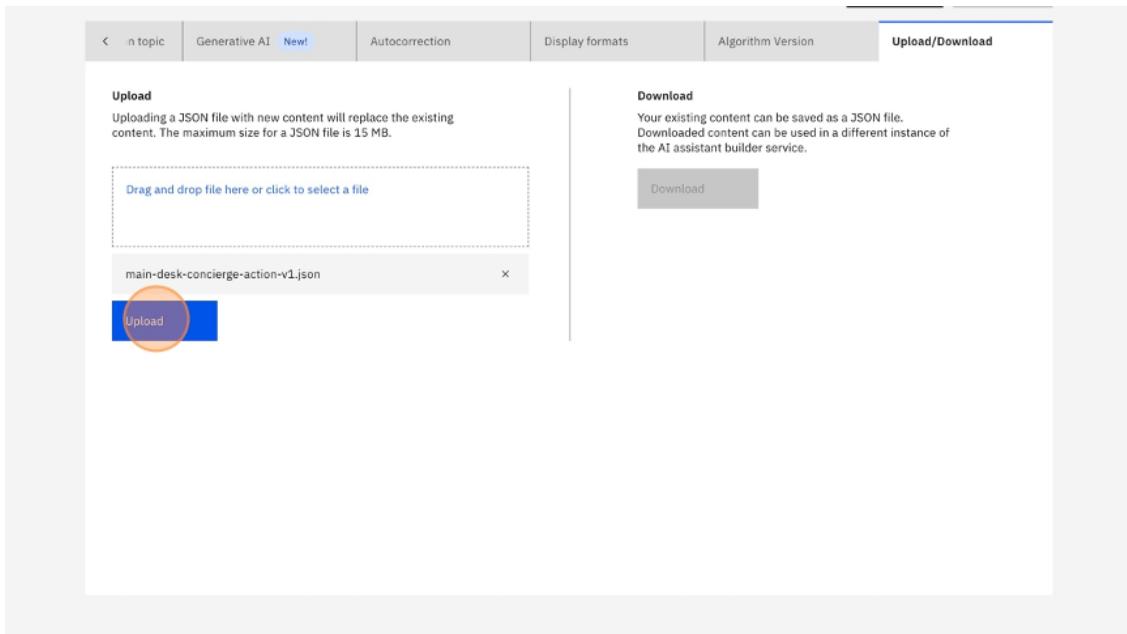
1. Click "Upload/Download"



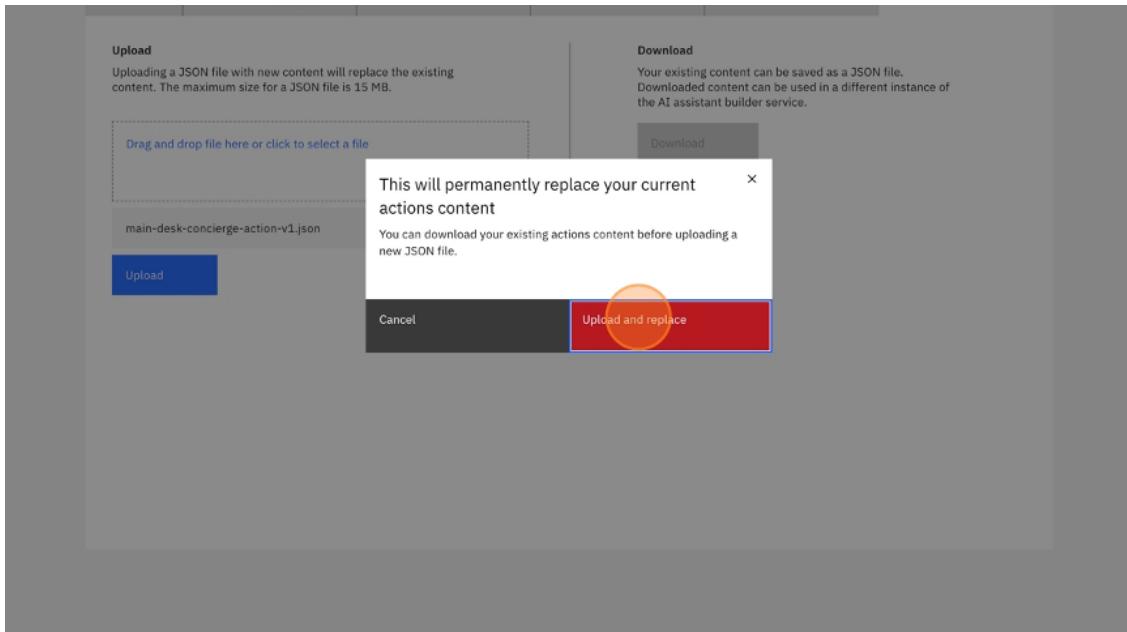
1. Click "Drag and drop file here or click to select a file" and upload Main-Desk-Concierge-action.json



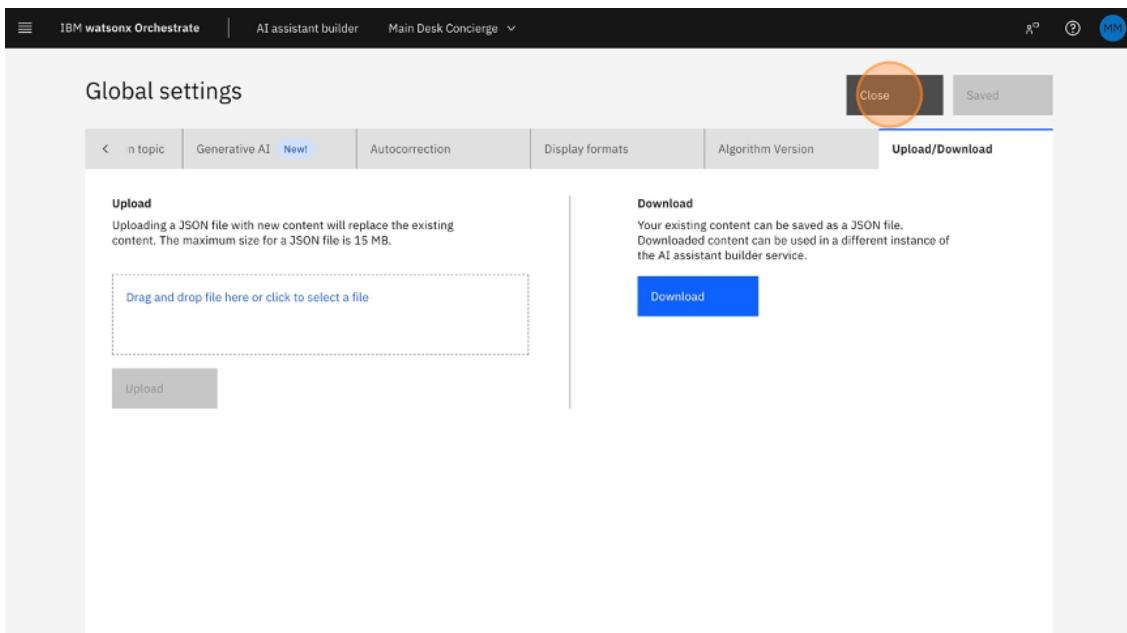
1. Click on "Upload"



1. Click "Upload and replace"

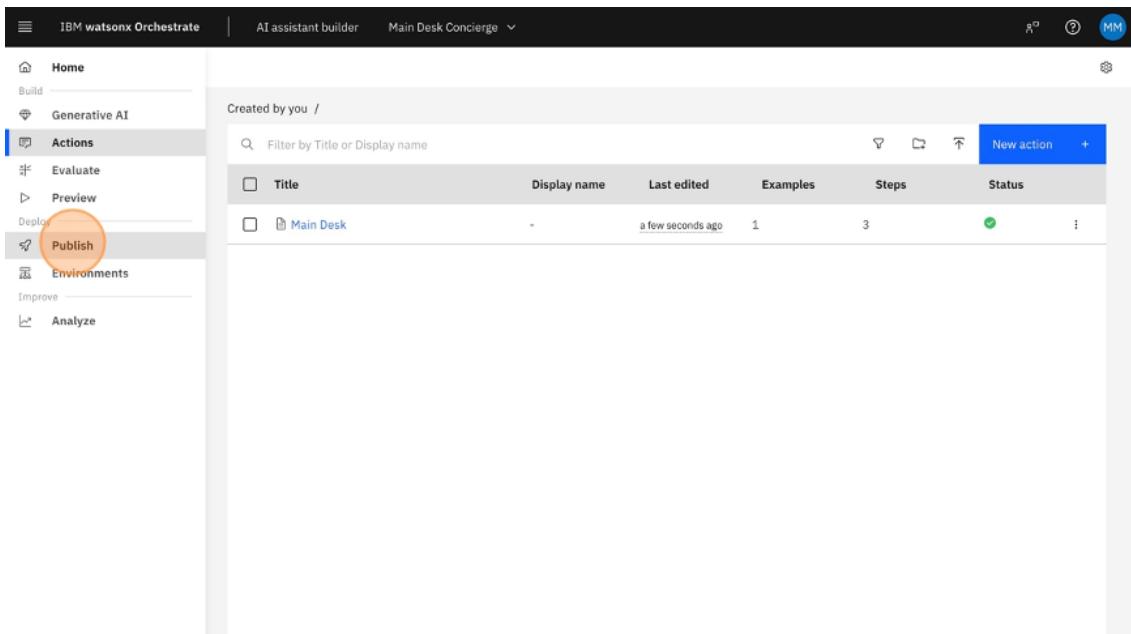


1. Click on "Close"



3. Publishing the Assistant

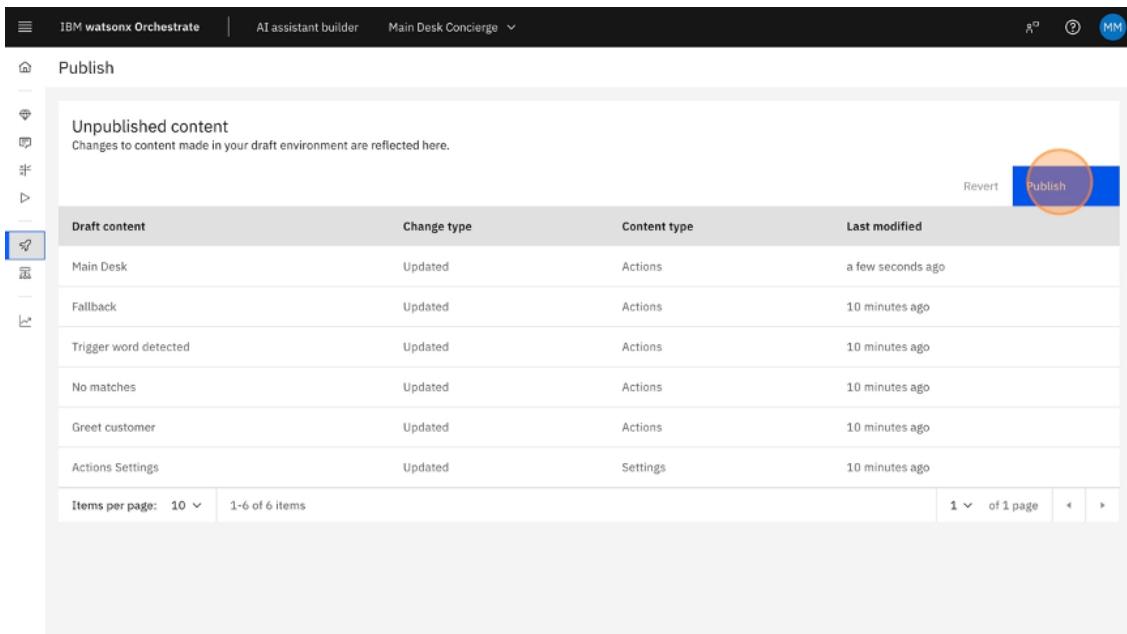
1. Click "Publish"



The screenshot shows the IBM Watsonx Orchestrate interface. The top navigation bar includes 'IBM Watsonx Orchestrate', 'AI assistant builder', 'Main Desk Concierge', and a user icon. The left sidebar has a 'Actions' section with several sub-options: 'Evaluate', 'Preview', 'Publish' (which is highlighted with an orange circle), and 'Environments'. The main content area is titled 'Created by you /' and shows a table with one row. The table columns are 'Title', 'Display name', 'Last edited', 'Examples', 'Steps', and 'Status'. The single row shows 'Main Desk' as the title, '-' as the display name, 'a few seconds ago' as the last edited time, 1 example, 3 steps, and a green status icon.

Title	Display name	Last edited	Examples	Steps	Status
Main Desk	-	a few seconds ago	1	3	Green

1. Click "Publish"



IBM Watsonx Orchestrate | AI assistant builder | Main Desk Concierge

Unpublished content

Changes to content made in your draft environment are reflected here.

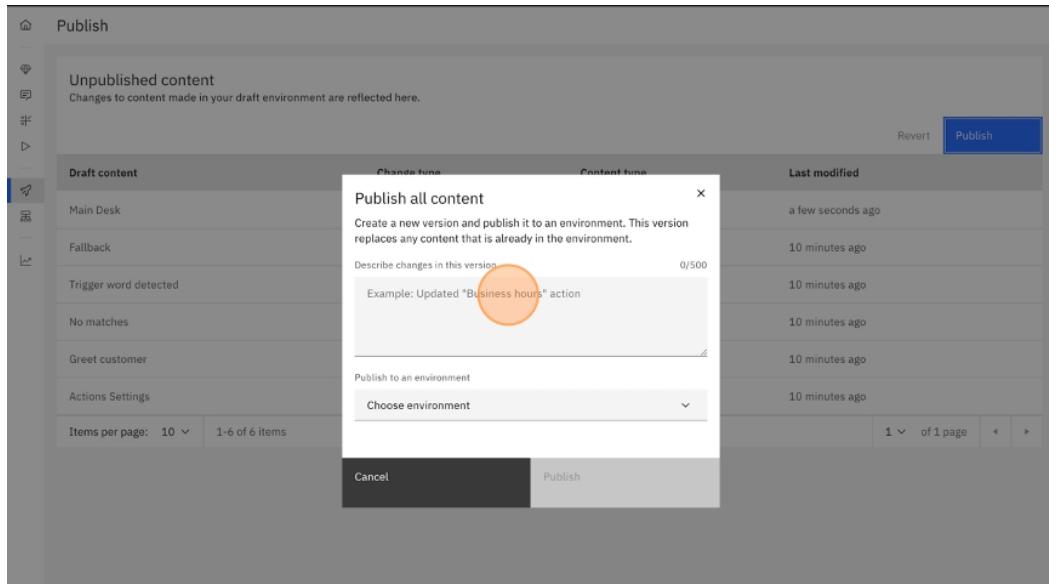
Draft content

Draft content	Change type	Content type	Last modified
Main Desk	Updated	Actions	a few seconds ago
Fallback	Updated	Actions	10 minutes ago
Trigger word detected	Updated	Actions	10 minutes ago
No matches	Updated	Actions	10 minutes ago
Greet customer	Updated	Actions	10 minutes ago
Actions Settings	Updated	Settings	10 minutes ago

Items per page: 10 | 1-6 of 6 items

Revert | Publish

1. In the “Example: Updated “Business hours” action” field enter:
First draft



Unpublished content

Changes to content made in your draft environment are reflected here.

Draft content

Draft content	Change type	Content type	Last modified
Main Desk	Updated	Actions	a few seconds ago
Fallback	Updated	Actions	10 minutes ago
Trigger word detected	Updated	Actions	10 minutes ago
No matches	Updated	Actions	10 minutes ago
Greet customer	Updated	Actions	10 minutes ago
Actions Settings	Updated	Settings	10 minutes ago

Items per page: 10 | 1-6 of 6 items

Publish all content

Create a new version and publish it to an environment. This version replaces any content that is already in the environment.

Describe changes in this version 0/500

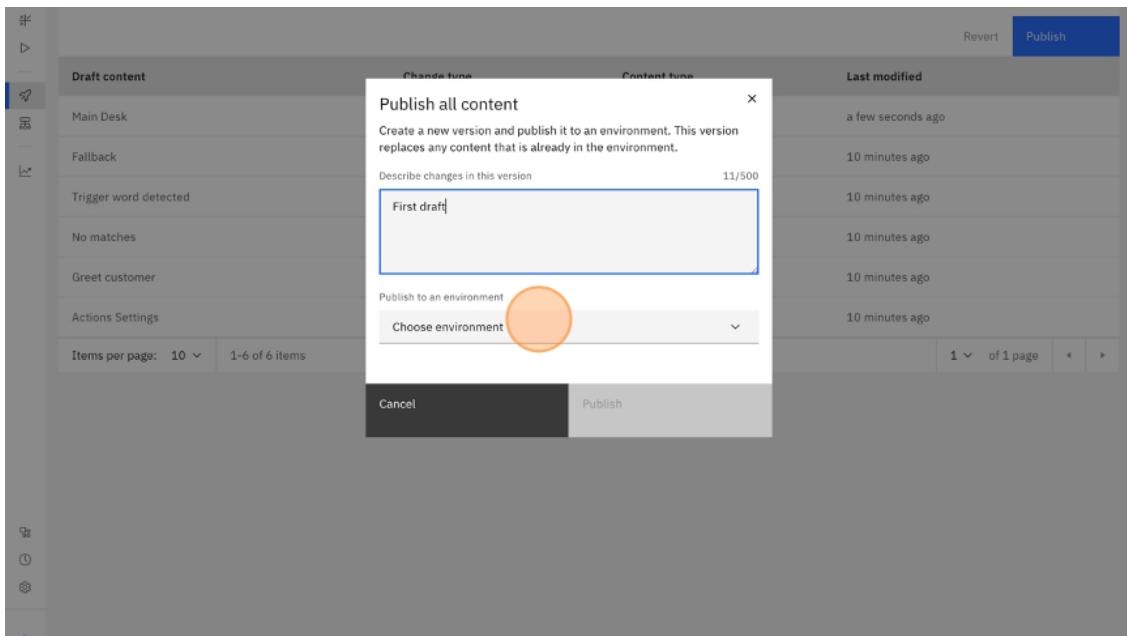
Example: Updated “Business hours” action

Publish to an environment

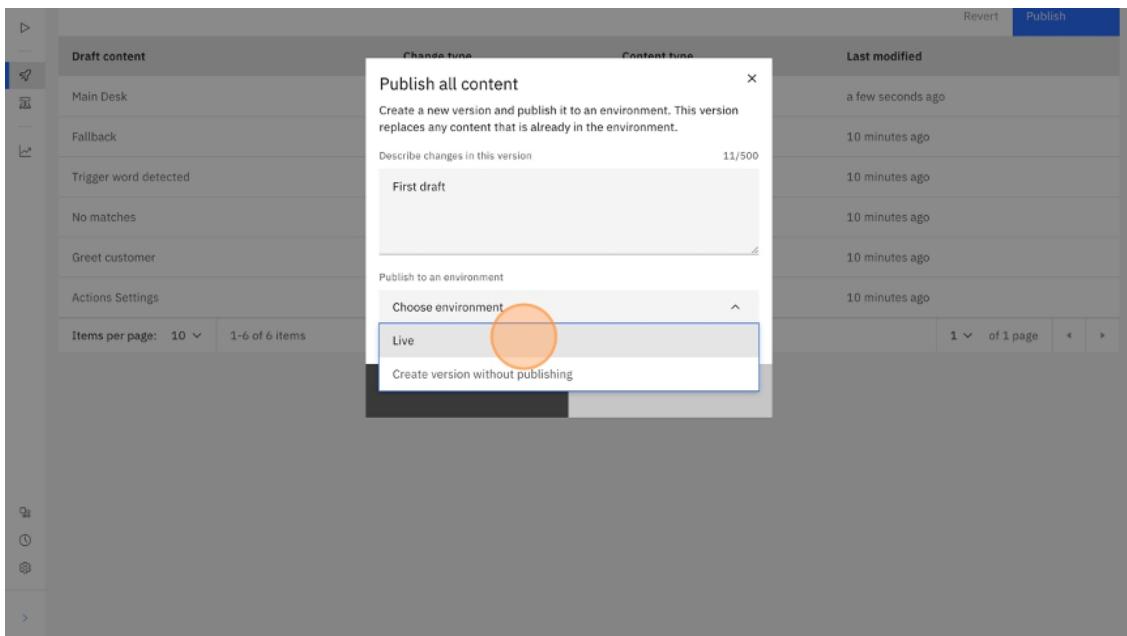
Choose environment

Cancel | Publish

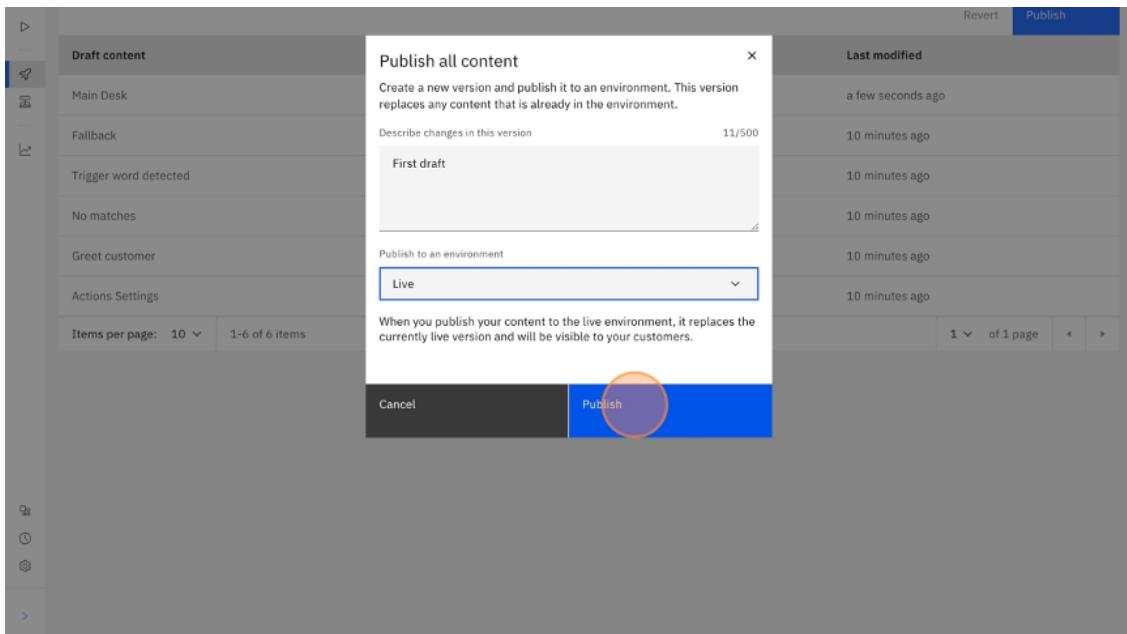
2. Click “Choose environment”



1. Click "Live"

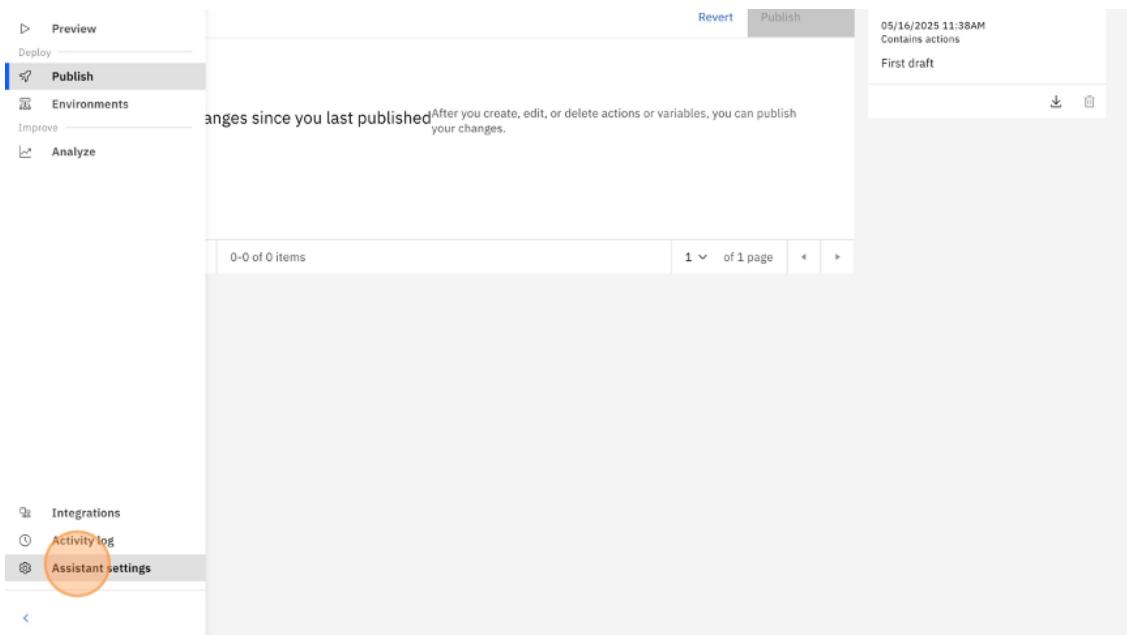


1. Click "Publish"



4. Getting Assistant Variables

1. Click "Assistant settings"



1. Click "View details"

Add a description for this assistant

Cancel Saved

Security certificates (SSL/TLS)

Upload self-signed or trusted CA certificates to secure the services integrations and extensions in your assistant. To upload multiple certificate files, merge the files to a single file before uploading. Only PEM format is supported. [Learn more](#)

Protocol

Trust uploaded certificates and any certificates signed by a trusted authority.

Trust uploaded certificates only.

Trust all certificates, operation insecure (Not recommended).

Assistant IDs and API details

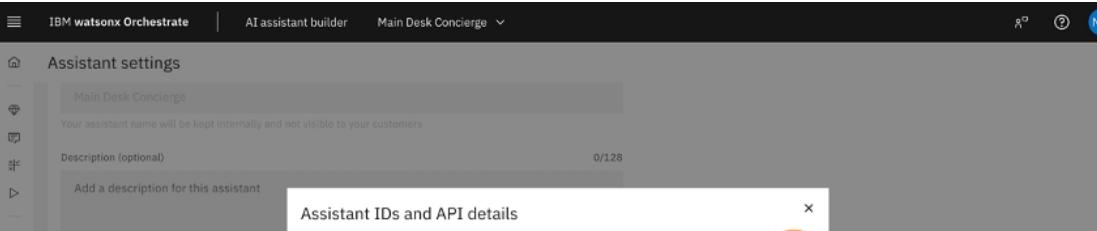
Get IDs and API details for your assistant, skills, and environments.

[View details](#)

Download/Upload

Download or upload your assistant as a ZIP file. You can also enable the download of language data files so you can translate training examples and assistant responses into other languages and use in additional assistants. [Learn more](#)

1. Copy "Service Instance URL", "Assistant ID", "Live Environment ID" to a note on your machine



IBM Watsonx Orchestrate | AI assistant builder | Main Desk Concierge | [?](#) [MM](#)

Assistant settings

Main Desk Concierge

Your assistant name will be kept internally and not visible to your customers

Description (optional)

Add a description for this assistant

0/128

[Cancel](#) [Saved](#)

Assistant IDs and API details

Service instance URL:

<https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/01234567890123456789012345678901> [Copy](#)

Assistant ID:

dfcdc7a1-4a37-4714-9189-daa885b3e4a9 [Copy](#)

Action Skill ID:

1744ee3b-f227-45b2-9848-98415cc3c872 [Copy](#)

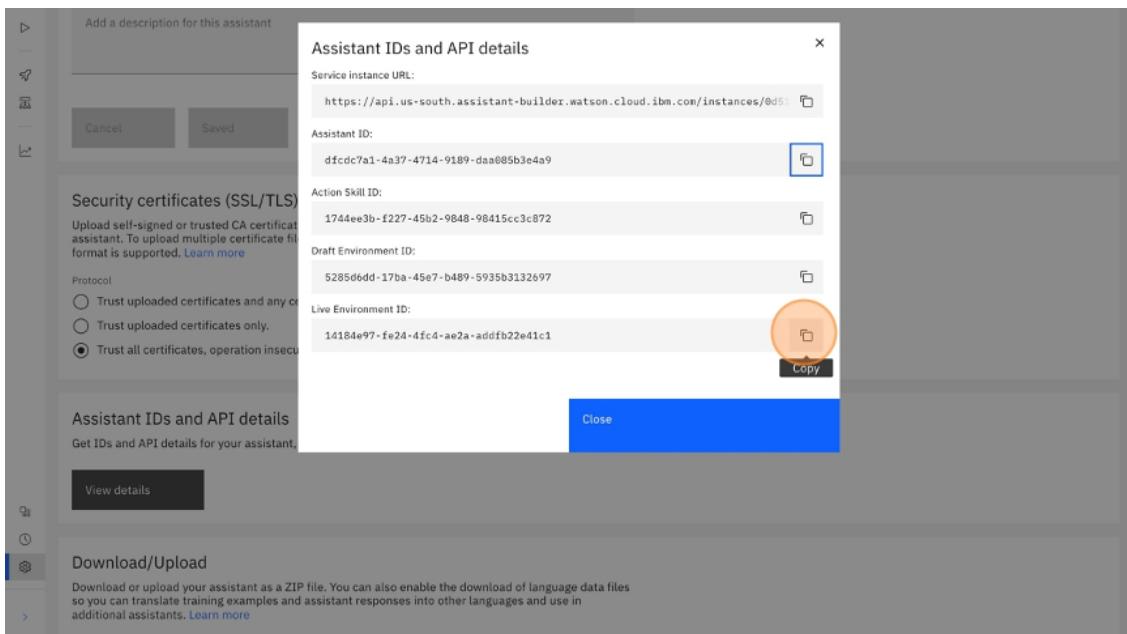
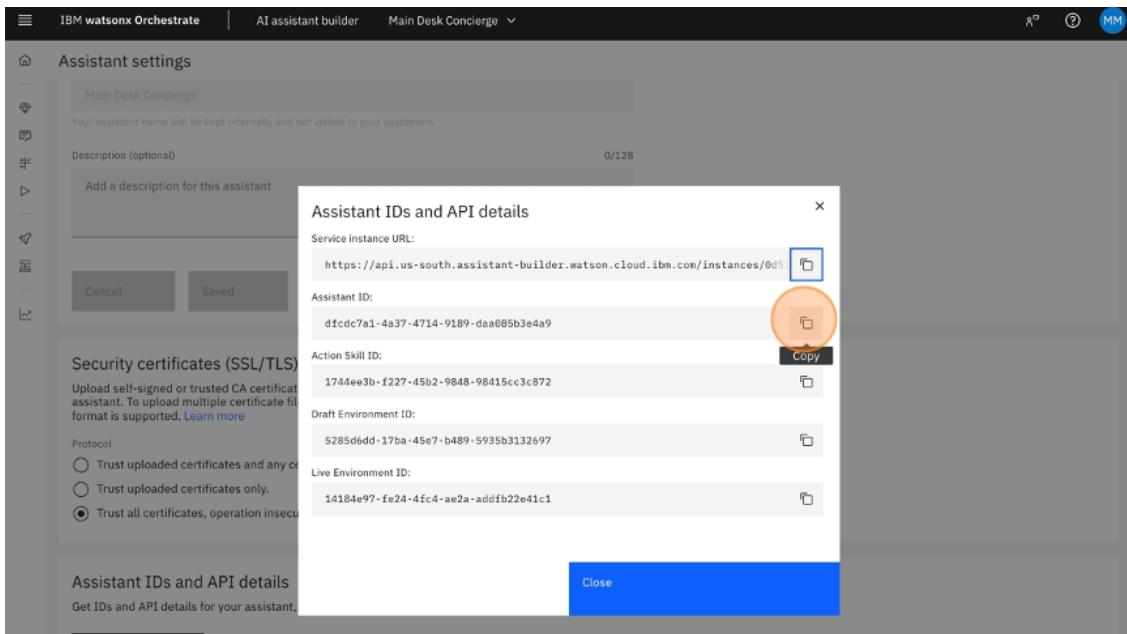
Draft Environment ID:

52856edd-17ba-45e7-b489-5935b3132697 [Copy](#)

Live Environment ID:

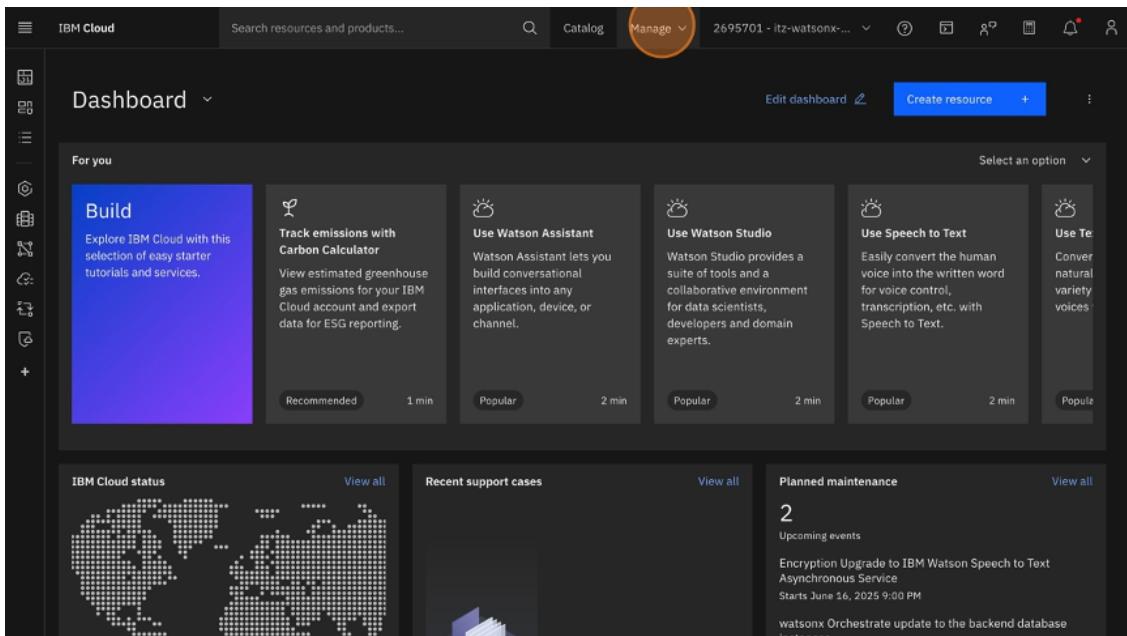
14184e97-fe24-4fc4-ae2a-addfb22e41c1 [Copy](#)

[Close](#)

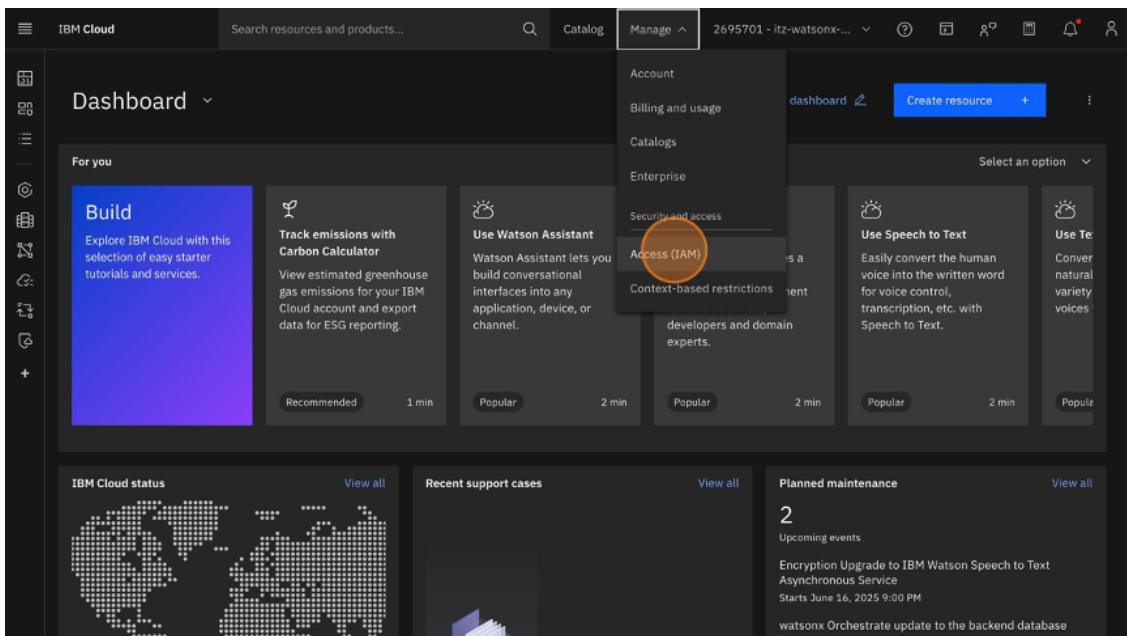


5. Generating an API Key

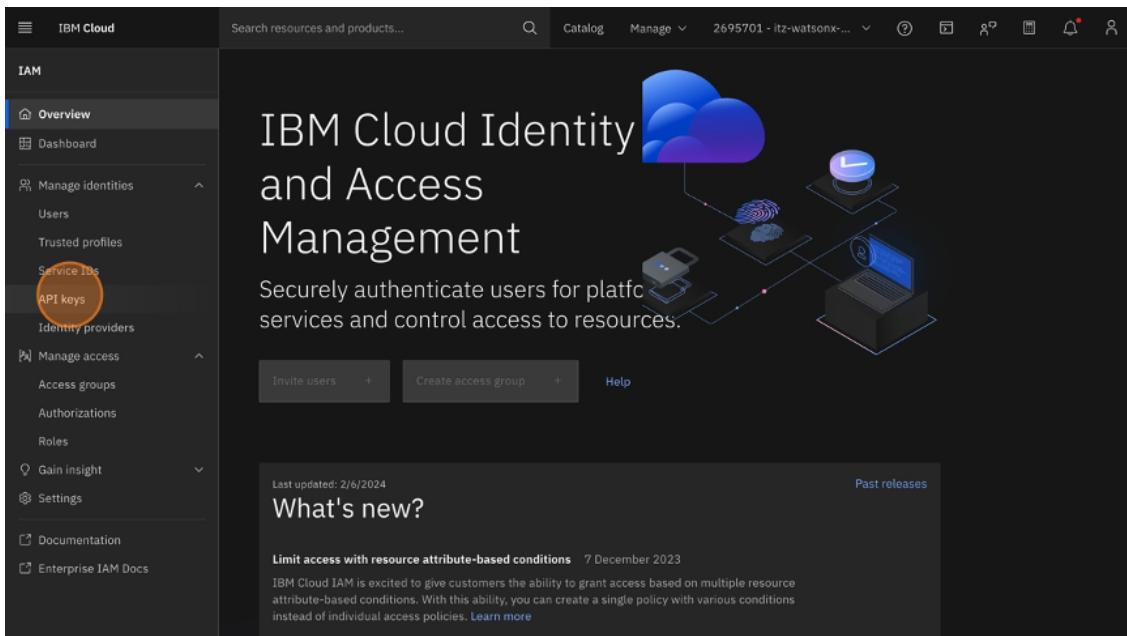
1. In a new tab, navigate to <https://cloud.ibm.com/>
2. Click "Manage"



1. Click "Access (IAM)"

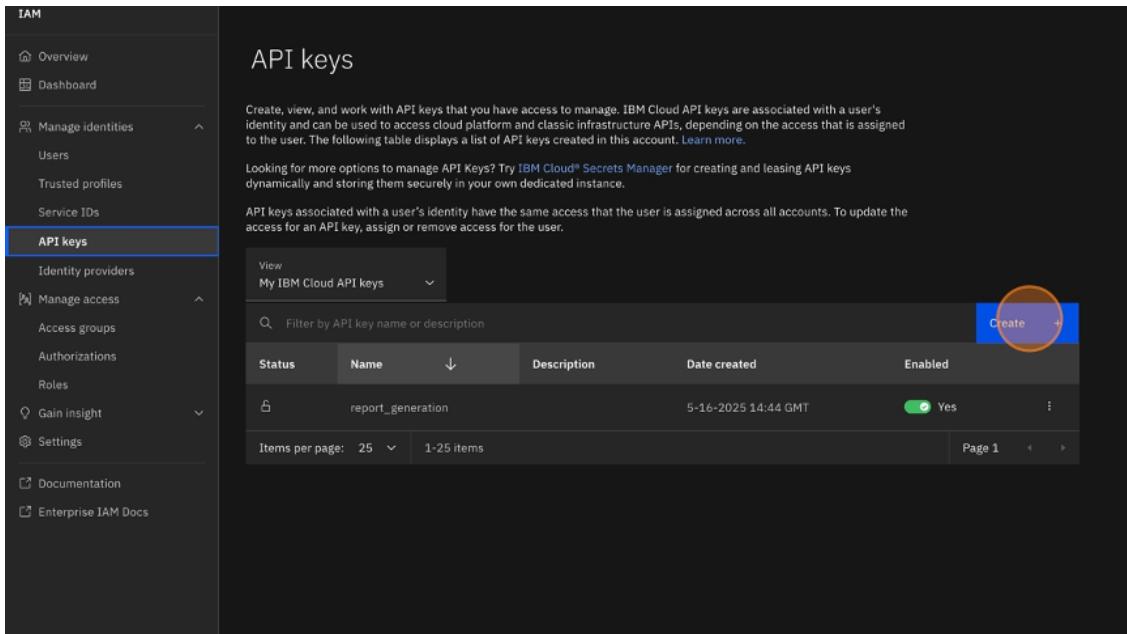


1. Click "API keys"



The screenshot shows the IBM Cloud Identity and Access Management (IAM) dashboard. The left sidebar is titled 'IAM' and includes the following navigation items: Overview, Dashboard, Manage identities (with sub-options: Users, Trusted profiles, Service IDs, API keys, Identity providers), Manage access (with sub-options: Access groups, Authorizations, Roles), Gain insight, Settings, Documentation, and Enterprise IAM Docs. The 'API keys' item is highlighted with a red circle. The main content area features a large title 'IBM Cloud Identity and Access Management' with a sub-headline 'Securely authenticate users for platform services and control access to resources.' Below the title are three buttons: 'Invite users', 'Create access group', and 'Help'. A 'What's new?' section is present, last updated on 2/6/2024, with a note about 'Limit access with resource attribute-based conditions' (7 December 2023). A 'Past releases' link is also visible.

1. Click "Create"



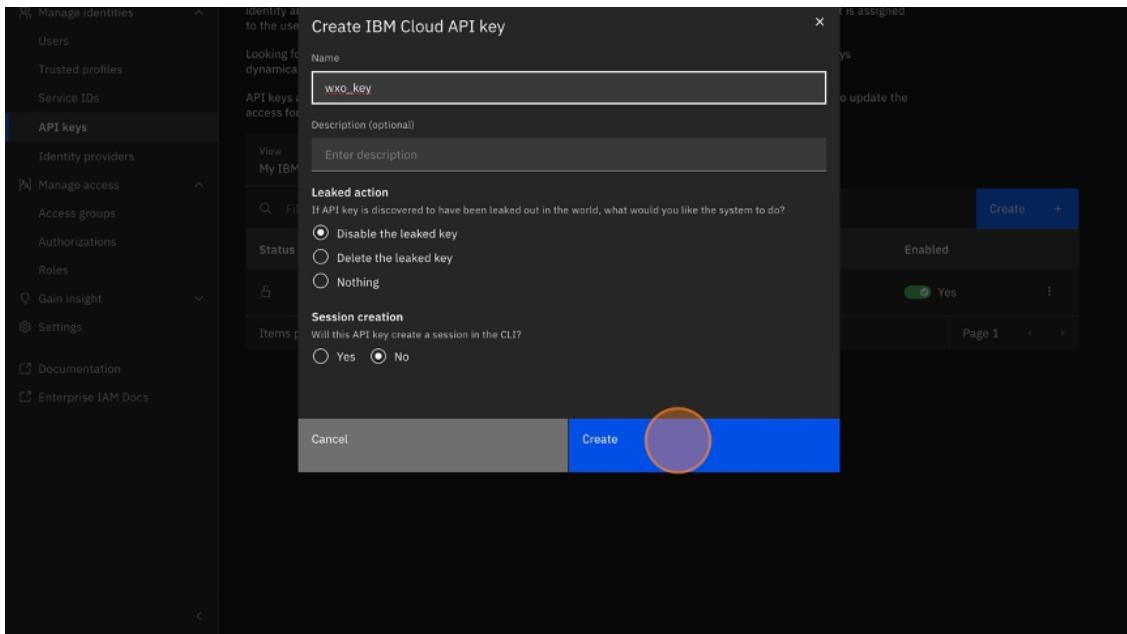
The screenshot shows the 'API keys' page within the IBM Cloud IAM interface. The left sidebar is identical to the previous dashboard. The main area is titled 'API keys' and contains a brief description of what API keys are and how to manage them. It includes a 'Create' button, which is highlighted with a red circle. Below the description is a table showing a single API key entry:

Status	Name	Description	Date created	Enabled
Active	report_generation		5-16-2025 14:44 GMT	Yes

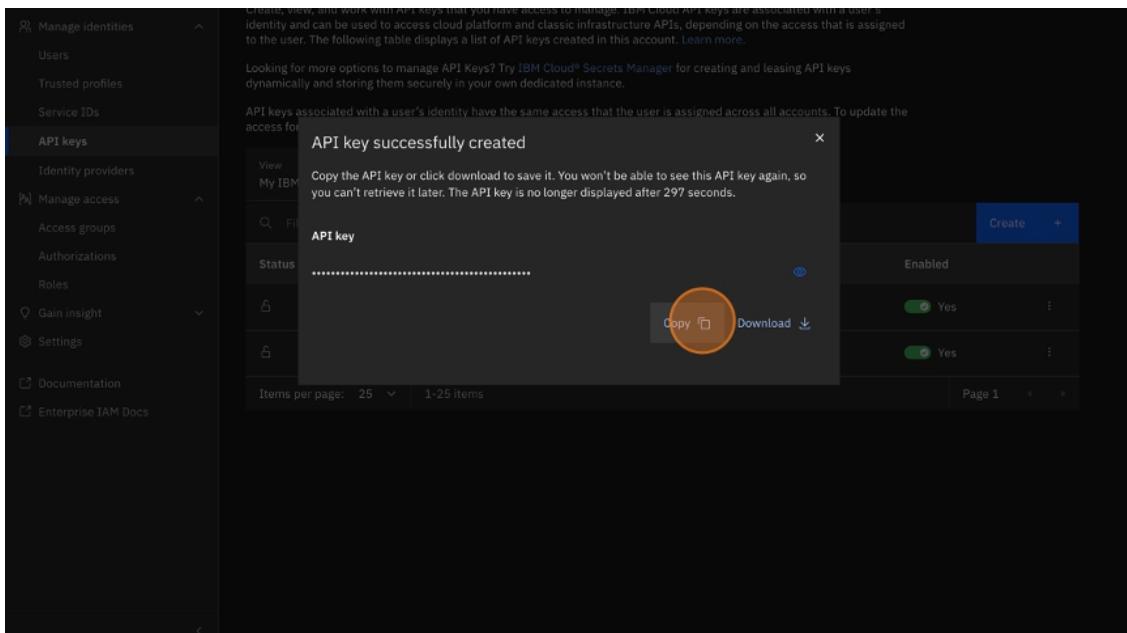
At the bottom of the table, there are pagination controls for 'Items per page' (25) and 'Page 1'.

1. In "Name" field enter: wxo_key

2. Click "Create"

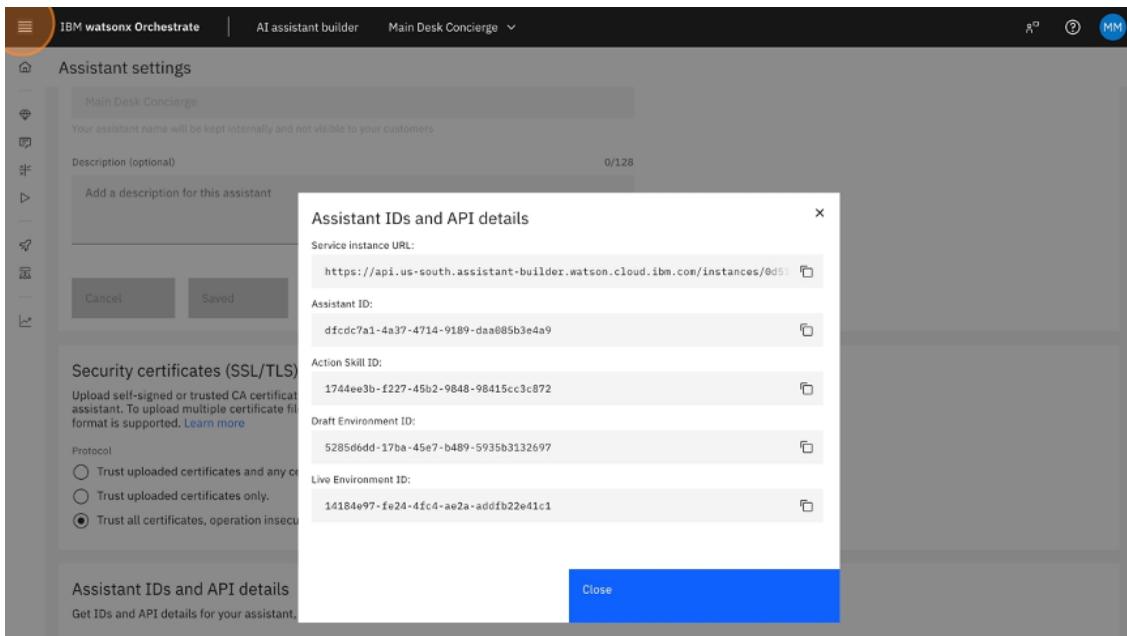


1. Copy API Key to Note on your local machine

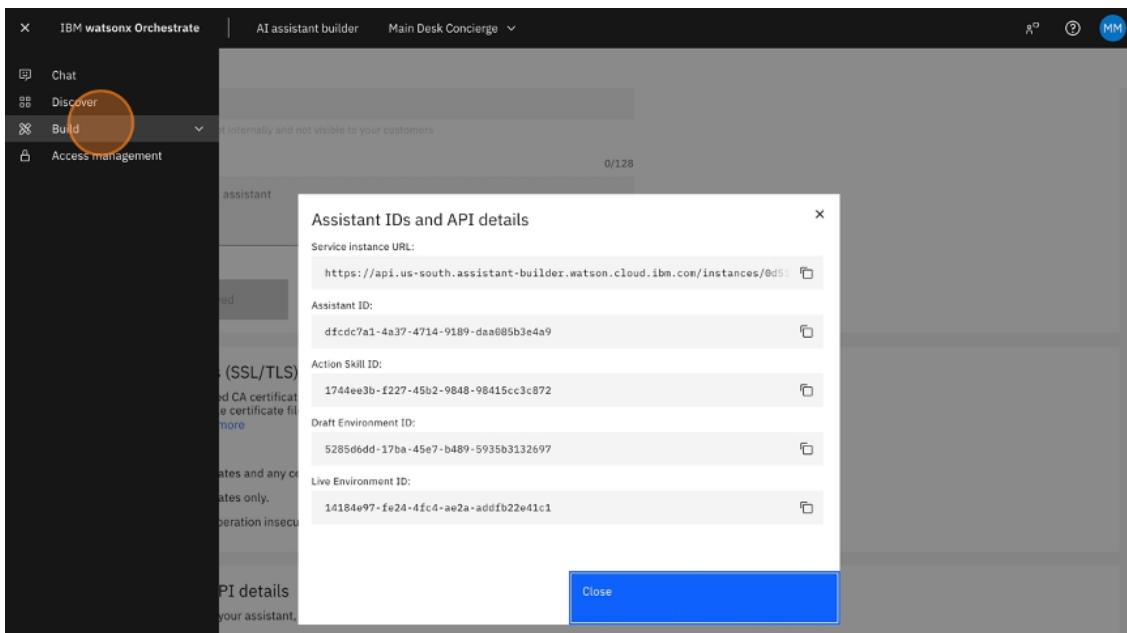


6. Importing the Assistant

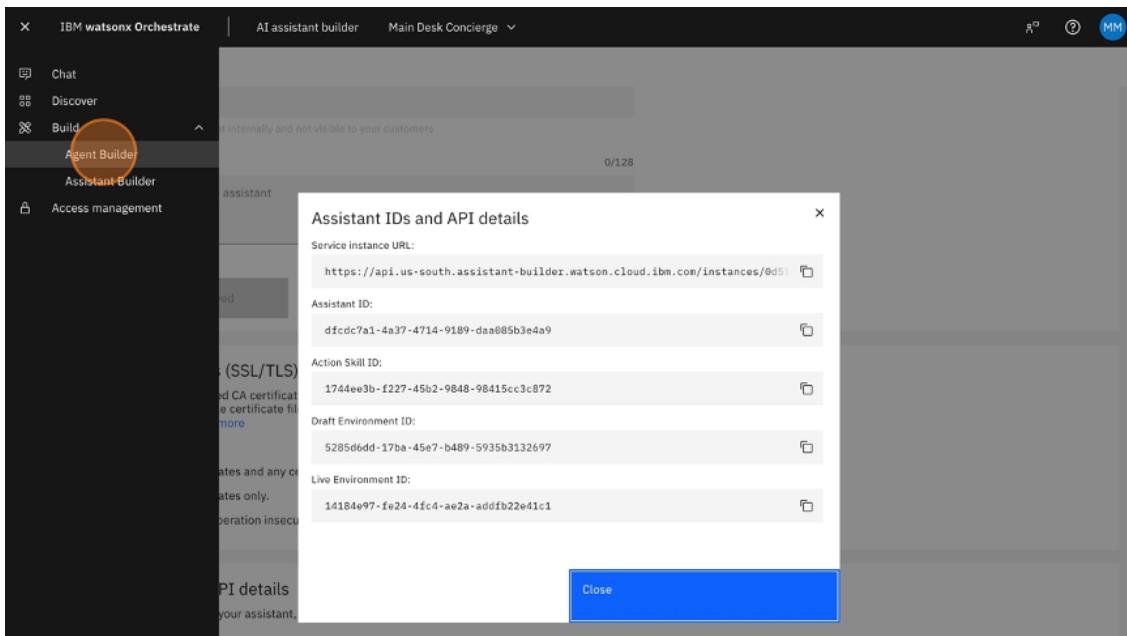
1. Switch to tab WatsonX Orchestrate tab.
2. Click on the hamburger menu icon in the top left



1. Click on "Build"



1. Select "Agent Builder"



1. Select "AskBenefits"

A screenshot of the 'Manage agents' page. At the top, there is a search bar and two buttons: 'Discover agents' and 'Create agent'. Below the search bar, there is a table with two rows. The first row is for 'AskDental', and the second row is for 'AskBenefits', which is highlighted with a red circle. Each row shows 'Tools' (4 for AskDental, 1 for AskBenefits) and 'Agents' (0 for both). Both rows have a 'Live' button and an arrow icon.

1. Click "Add Agent" under "Agents"

AskBenefits

Profile

Knowledge

Toolset

Behavior

get_member_insights

get_schedule

Agents

Add agent

AskDental

11:46 AM

Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

1. Click "Import and register an external agent."

Add a new agent

Close

Add from catalog

Choose from a catalog of pre-built agents.

Add from local instance

Choose from a list of agents available on this instance.

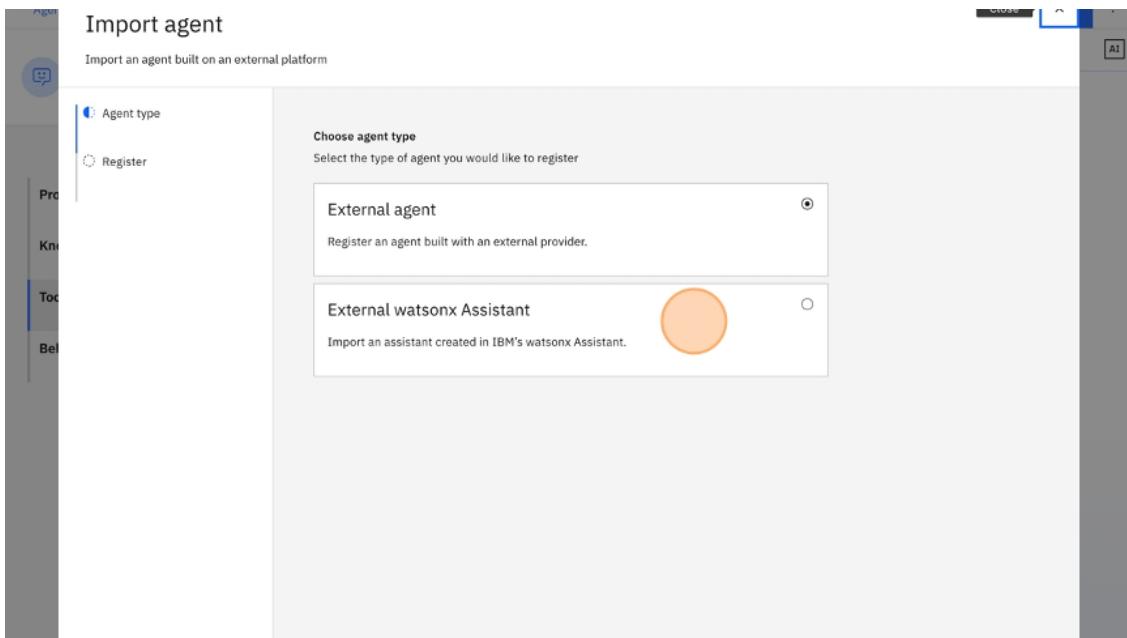
Import

Import and register an external agent.

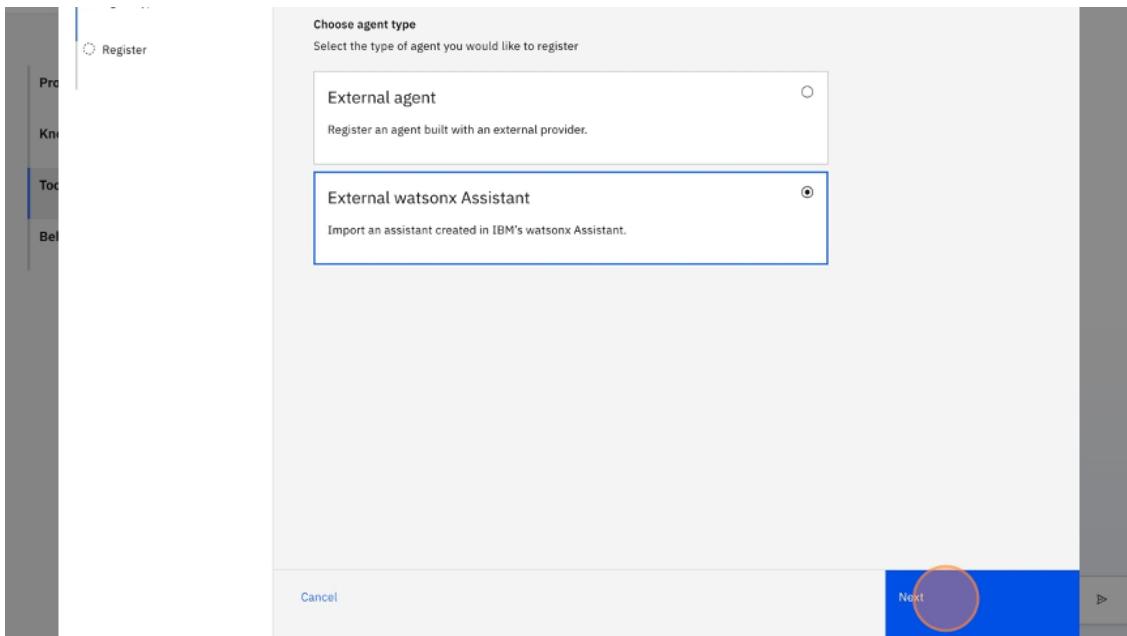
welcome to
Orchestrate.

Type something...

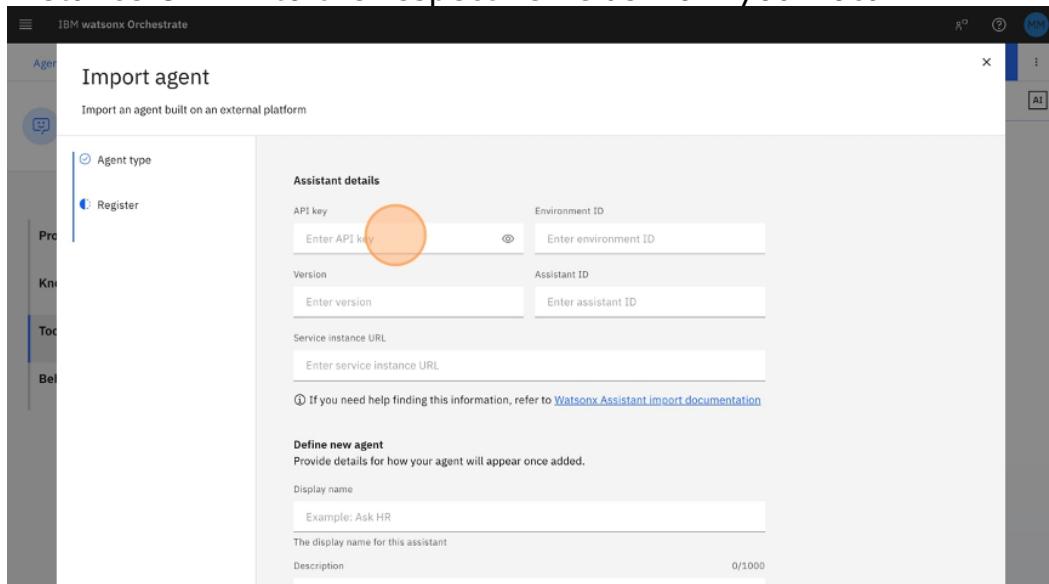
1. Click "External watsonx Assistant"



1. Click "Next"



1. Copy “API Key”, “Environment ID”, “Assistant ID”, “Service Instance URL” into the respective fields from your local



IBM Watsonx Orchestrate

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key	Environment ID	<input type="text"/>
Version	<input type="text"/>	Assistant ID	<input type="text"/>
Service instance URL			
<input type="text"/>			

ⓘ If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name
 Example: Ask HR

The display name for this assistant

Description
 0/1000

IBM Watsonx Orchestrate

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key	Environment ID	<input type="text"/> 14184e97-fe24-4fc4-ae2a-addfb22e41c
Version	<input type="text"/> 2024-08-25	Assistant ID	<input type="text"/>
Service instance URL			
<input type="text"/>			

ⓘ If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name
 Example: Ask HR

The display name for this assistant

Description
 0/1000

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key	Environment ID
.....	14184e97-fe24-4fc4-ae2a-addfb22e41c
Version	Assistant ID
2024-08-25	dfcdc7a1-4a37-4714-9189-daa085b3e4
Service instance URL	Enter service instance URL

Enter service instance URL

If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name

Example: Ask HR

The display name for this assistant

Description

0/1000

Example: Ask HR is a tool to help employees...

Produce a short description of what this assistant is capable of providing to your users. This will help the

1. In the "Version" field enter: 2024-08-25

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key	Environment ID
.....	14184e97-fe24-4fc4-ae2a-addfb22e41c
Version	Assistant ID
Enter version	Enter assistant ID
Service instance URL	Enter service instance URL

Enter version

Enter assistant ID

Enter service instance URL

If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name

Example: Ask HR

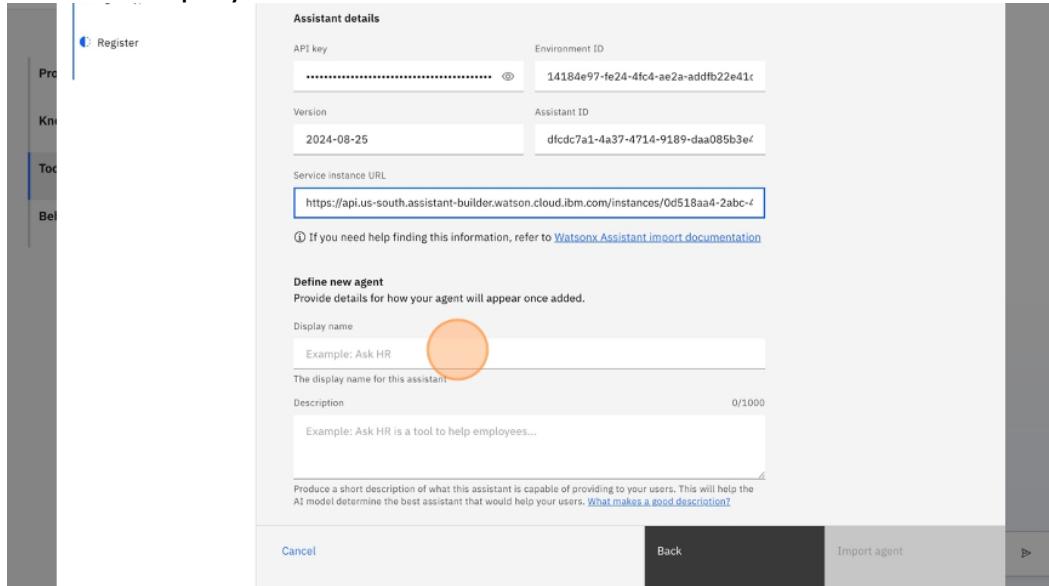
The display name for this assistant

Description

0/1000

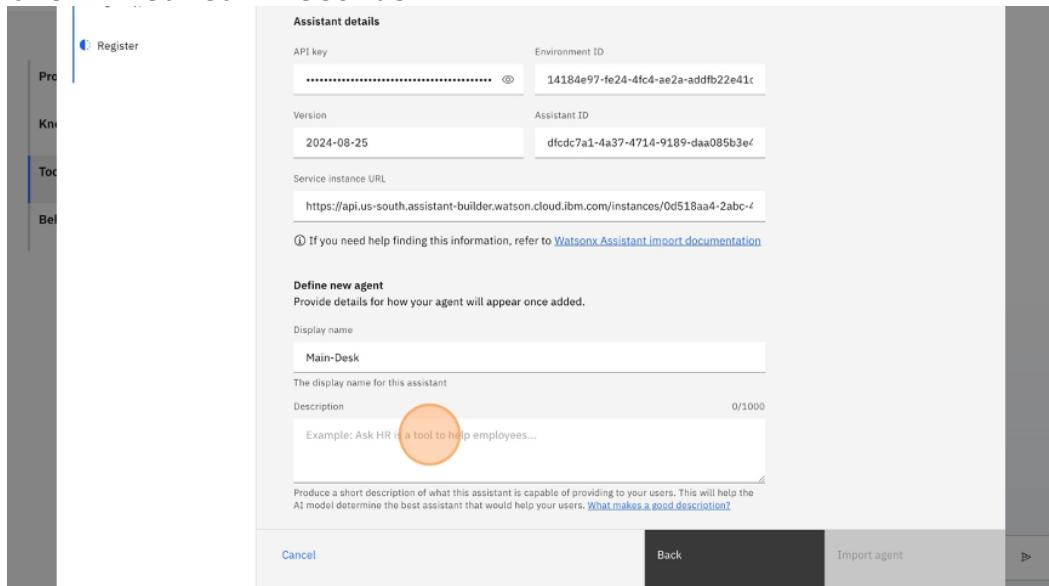
Example: Ask HR is a tool to help employees...

2. In the “Display name” field enter: Main Desk



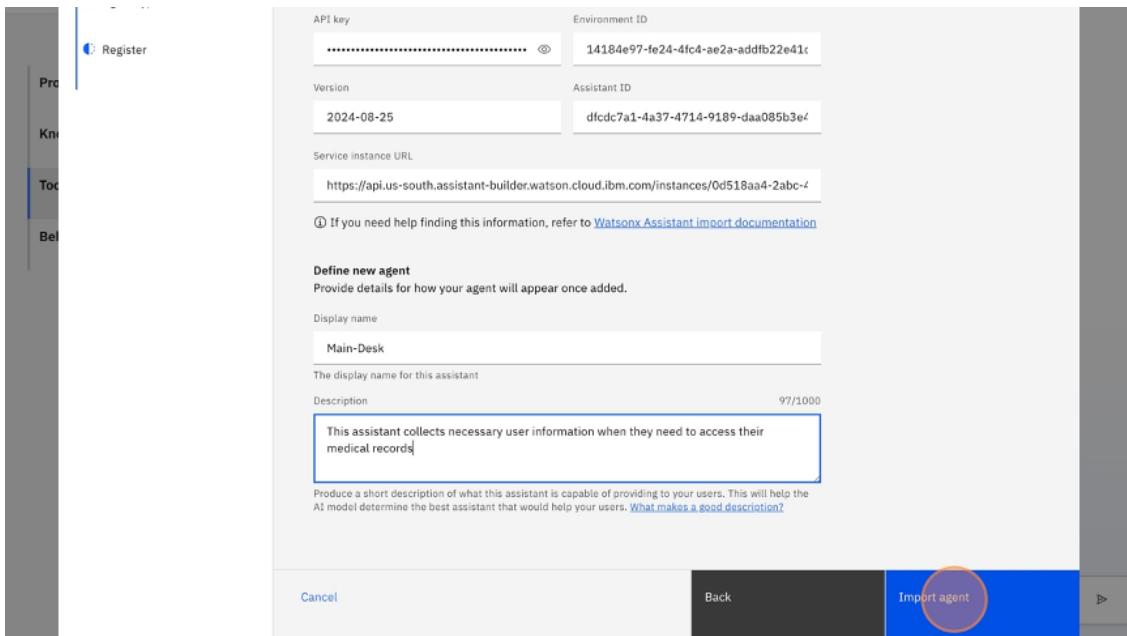
The screenshot shows a web page for creating a new Watson Assistant. The 'Display name' field is highlighted with an orange circle. The page includes fields for API key, Environment ID, Version, Assistant ID, Service instance URL, and a detailed description section. Buttons for Cancel, Back, Import agent, and a right-pointing arrow are at the bottom.

3. In the “Description” field enter: This assistant collects necessary user information when they need to access their medical records

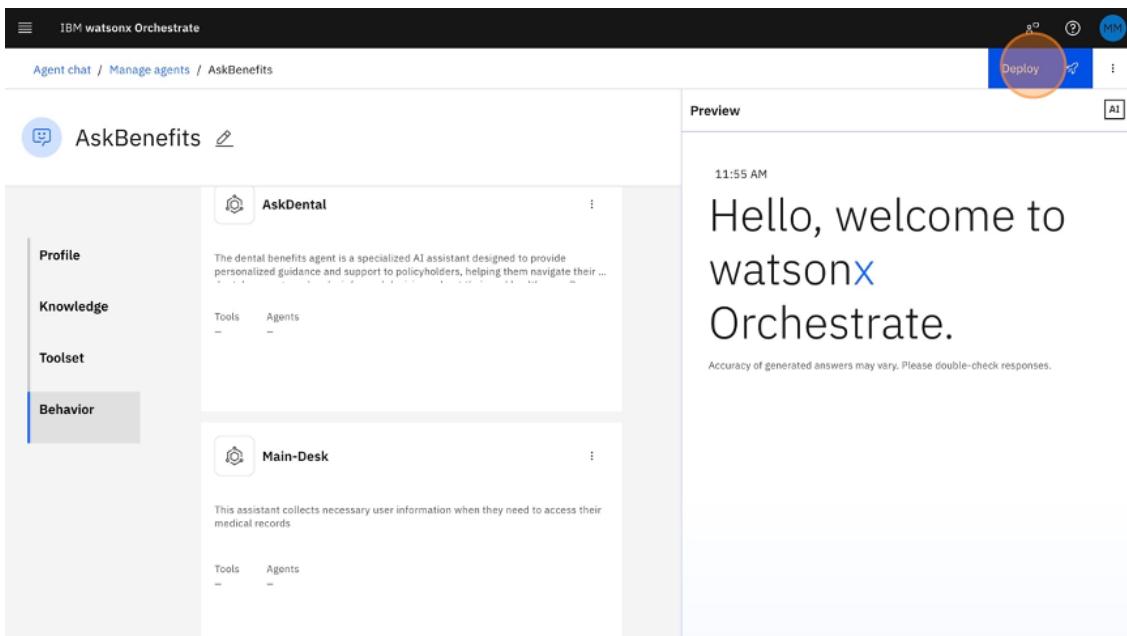


The screenshot shows the same Watson Assistant creation page. The 'Description' field is highlighted with an orange circle. The page structure is identical to the previous screenshot, with fields for API key, Environment ID, Version, Assistant ID, Service instance URL, and a detailed description section. Buttons for Cancel, Back, Import agent, and a right-pointing arrow are at the bottom.

4. Click “Import agent”



1. Click "Deploy"



Secondary Testing Scenarios

After successful deployment, test the AskBenefits agent with the following sample prompts to verify functionality with the included Main Desk Assistant:

1. **Initiate Main Desk Assistant:** I need to access my medical history
2. **Provide Name:** Charlie Smith
3. **Provide Date of Birth:** 03-04-2013

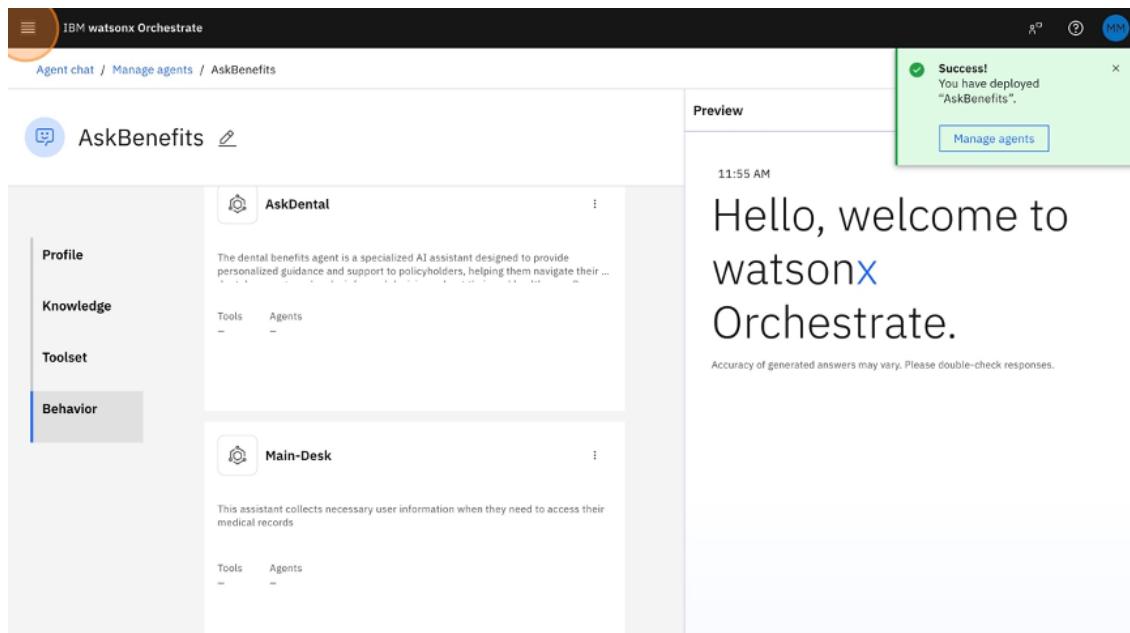
4. Previous Procedure Query: When did I have my last vision exam?

5. Follow-up on Previous Procedure Query: and where was it?

AskReporting Step-by-Step Instructions

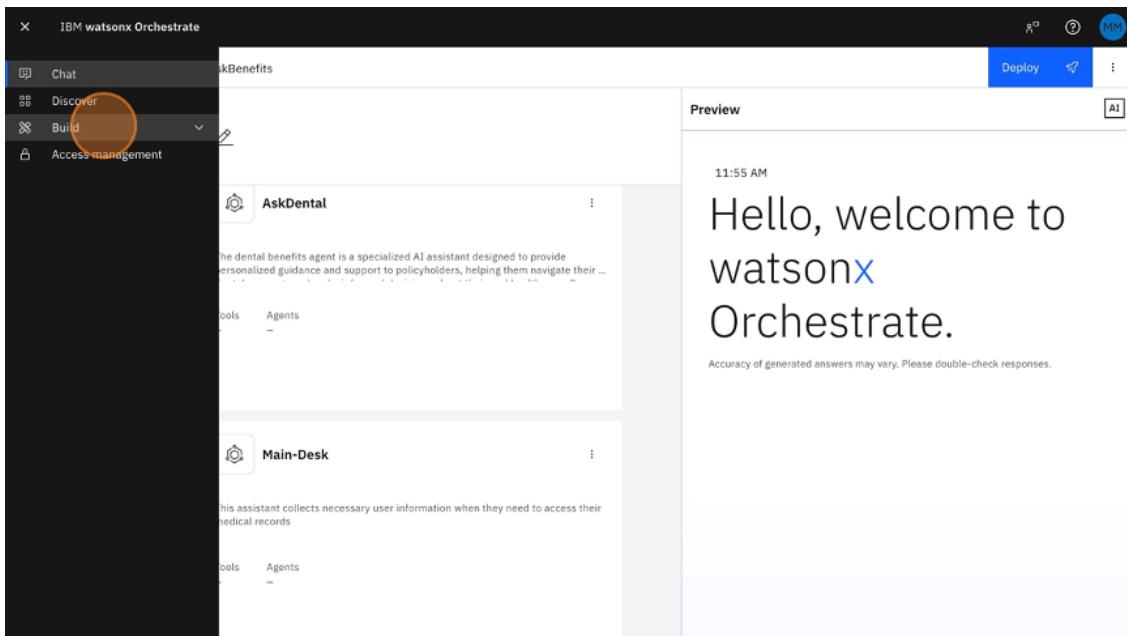
1. Create AskReporting

1. Click on the hamburger menu icon in the top left

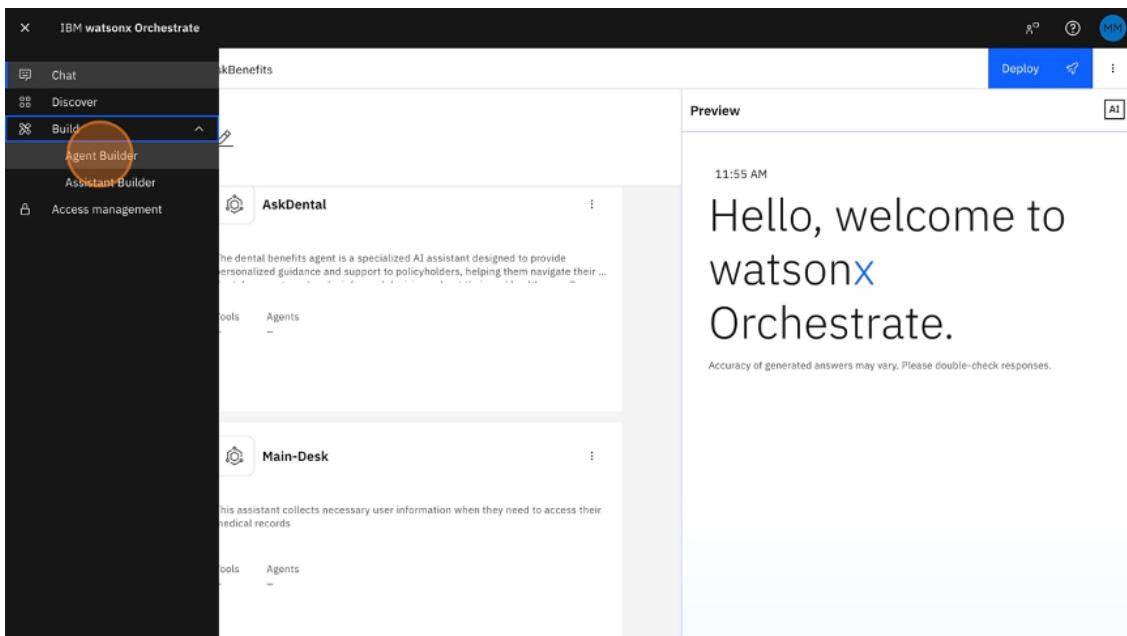


The screenshot shows the IBM WatsonX Orchestrate interface. At the top, there is a navigation bar with the text 'IBM WatsonX Orchestrate', 'Agent chat', 'Manage agents', and 'AskBenefits'. On the left, there is a sidebar with sections for 'Profile', 'Knowledge', 'Toolset', and 'Behavior'. The 'Behavior' section is currently selected and highlighted in blue. It contains two entries: 'AskDental' and 'Main-Desk'. The 'AskDental' entry is expanded, showing a brief description: 'The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their ...'. Below this, there are 'Tools' and 'Agents' buttons, both of which are currently set to 0. The 'Main-Desk' entry is collapsed. On the right, there is a 'Preview' section with a green success message: 'Success! You have deployed "AskBenefits".' and a 'Manage agents' button. Below the preview, the text 'Hello, welcome to watsonX Orchestrate.' is displayed, followed by a note: 'Accuracy of generated answers may vary. Please double-check responses.' The timestamp '11:55 AM' is also visible.

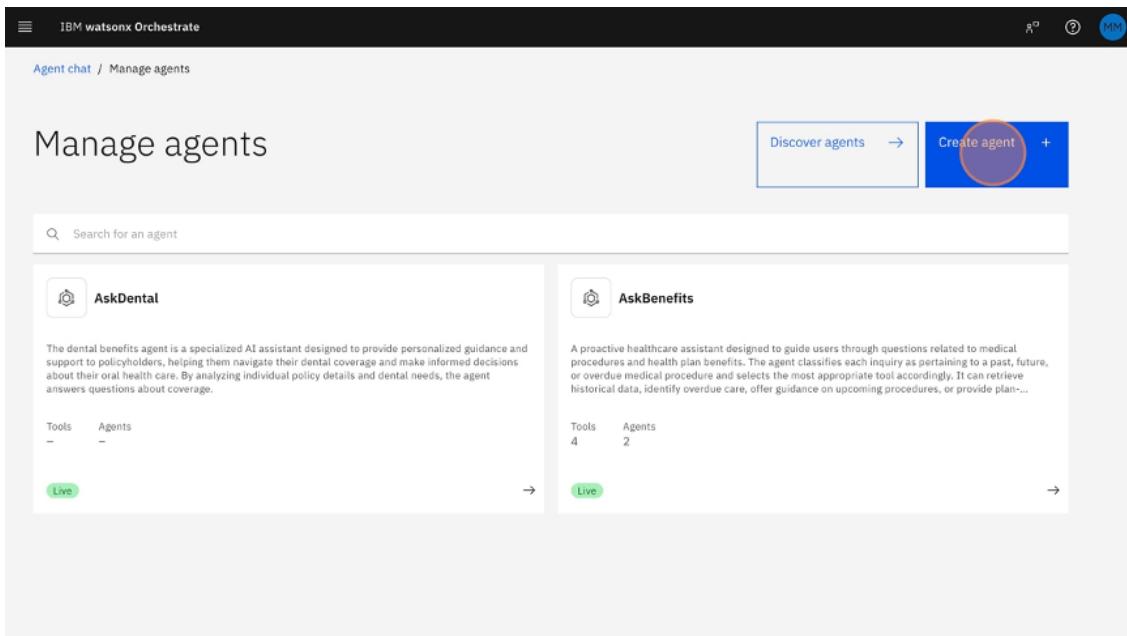
1. Click on "Build"



1. Select "Agent Builder"



1. Click "Create agent"



Manage agents

Discover agents → Create agent +

AskDental

The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their dental coverage and make informed decisions about their oral health care. By analyzing individual policy details and dental needs, the agent answers questions about coverage.

Tools 4 Agents 2

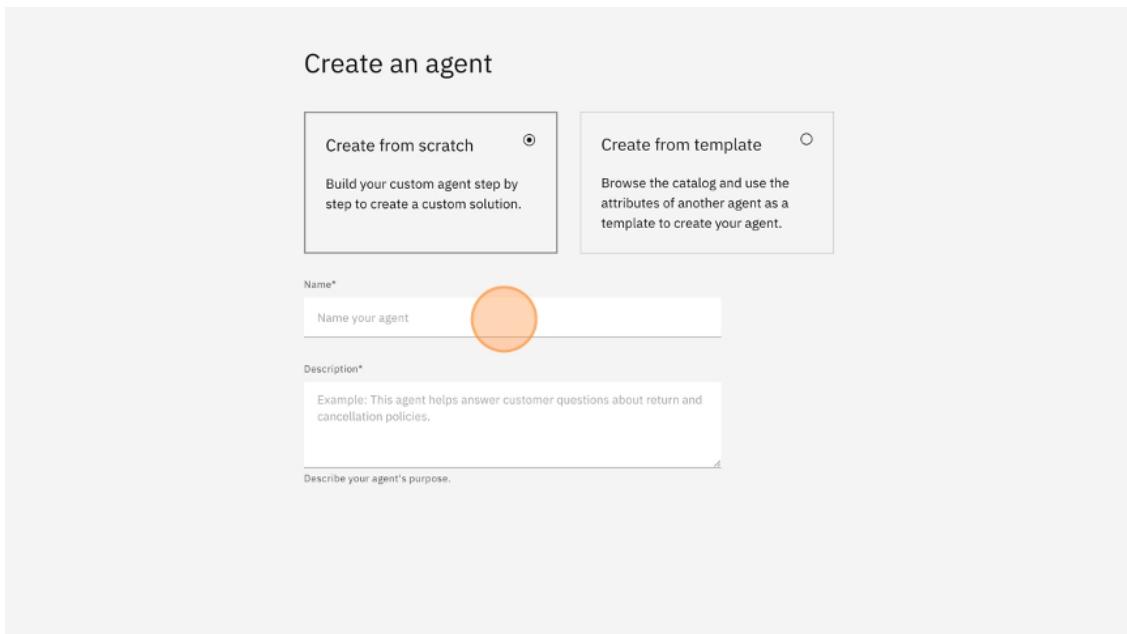
AskBenefits

A proactive healthcare assistant designed to guide users through questions related to medical procedures and health plan benefits. The agent classifies each inquiry as pertaining to a past, future, or overdue medical procedure and selects the most appropriate tool accordingly. It can retrieve historical data, identify overdue care, offer guidance on upcoming procedures, or provide plan...

Tools 4 Agents 2

Live

1. In the "Name*" field, enter: AskReporting



Create an agent

Create from scratch

Build your custom agent step by step to create a custom solution.

Name*

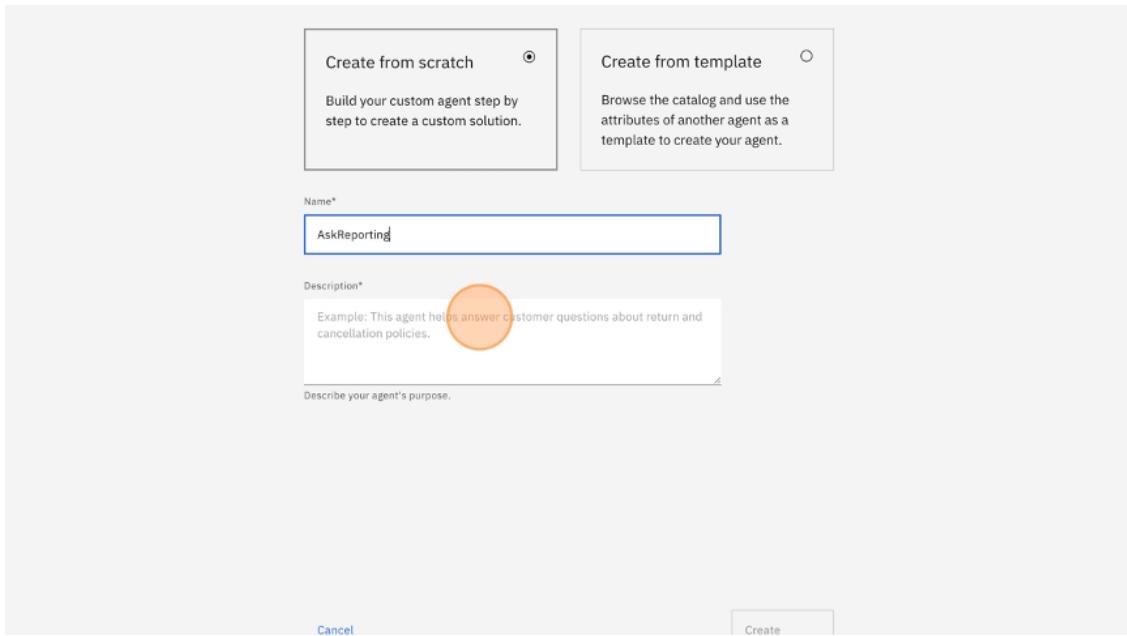
Create from template

Browse the catalog and use the attributes of another agent as a template to create your agent.

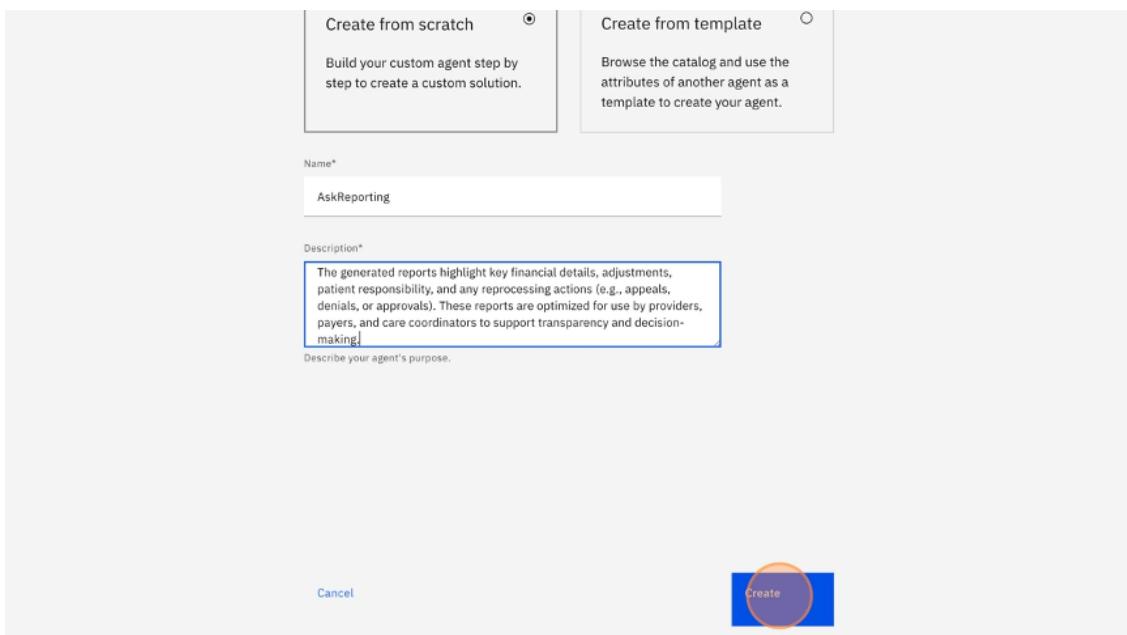
Description*

Describe your agent's purpose.

1. In the "Description*" field, enter: This agent is responsible for generating care reports that summarize the status and outcomes of healthcare claims. It reviews structured claim data and related correspondence to produce a clear, accessible summary of each claim's history, current status, and resolution path. The generated reports highlight key financial details, adjustments, patient responsibility, and any reprocessing actions (e.g., appeals, denials, or approvals). These reports are optimized for use by providers, payers, and care coordinators to support transparency and decision-making.

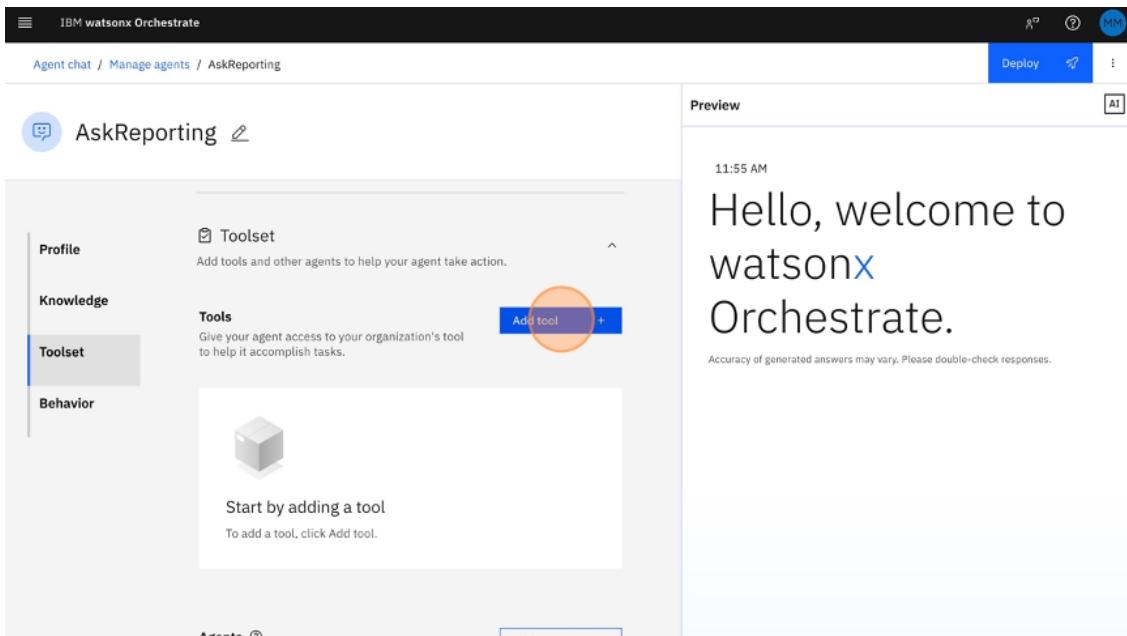


1. Click "Create" to initialize your agent



2. Importing and Attaching Tools

1. Click "Add tool"



IBM Watsonx Orchestrate

Agent chat / Manage agents / AskReporting

Deploy AI

Preview

11:55 AM

Hello, welcome to watsonx Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

Profile

Knowledge

Toolset

Behavior

Toolset

Add tools and other agents to help your agent take action.

Tools

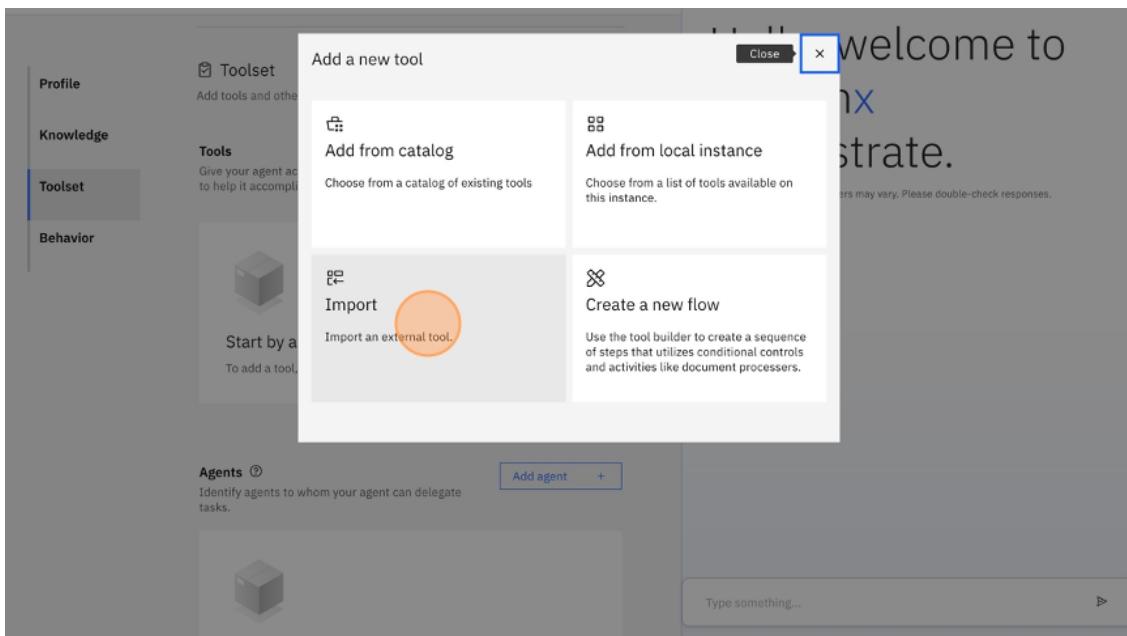
Give your agent access to your organization's tool to help it accomplish tasks.

Add tool +

Start by adding a tool

To add a tool, click Add tool.

1. Select "Import an external tool."



Add a new tool

Close x

Add from catalog

Choose from a catalog of existing tools

Add from local instance

Choose from a list of tools available on this instance

Import

Import an external tool.

Create a new flow

Use the tool builder to create a sequence of steps that utilizes conditional controls and activities like document processors.

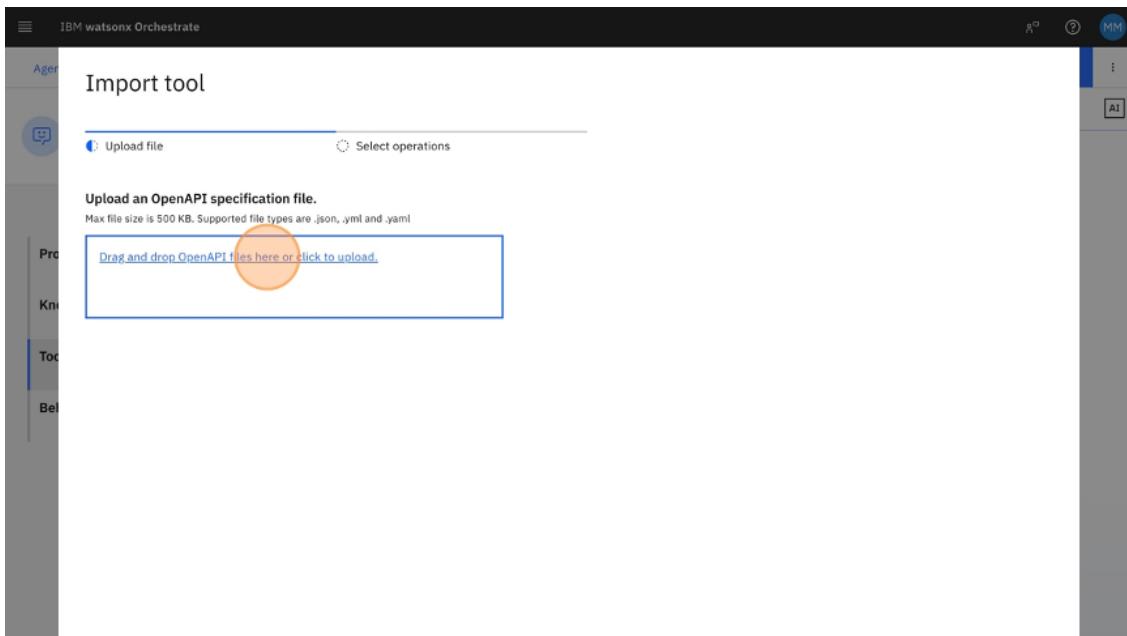
Agents

Identify agents to whom your agent can delegate tasks.

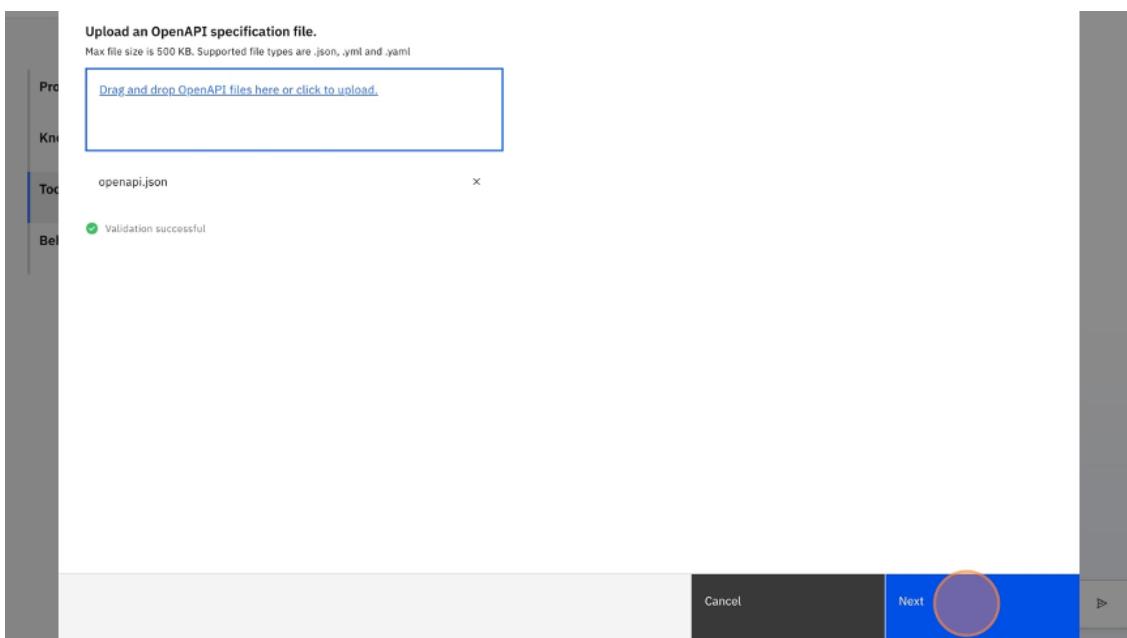
Add agent +

Type something...

1. Click on the upload area labeled "Drag and drop OpenAPI files here or click to upload."



1. Upload the file containing the OpenAPI specification file: `openapi-tools-report.json`
2. Click "Next"



1. Click "Select all rows in the table" to select all available tools

IBM Watsonx Orchestrate

Import tool

Upload file Select operations

Operations

Name	Method	Description
<input type="checkbox"/>	POST	<p>This API generates an HTML care report for the end user. How It Works - The input is a **JSON array**, where each item can be: 1. A **string** referencing the predefined section 'care_report', 2. A **dictionary** defining custom report elements: 'table', 'header', 'overview', or 'claim_review_chart'. Predefined Section Key - 'care_report': This is the only prebuilt section available. It can be modified with additional elements (headers, overviews, tables, and claim review charts). Custom Sections You can pass individual report elements as dictionaries. The allowed custom elements are: - 'table': CSV file - 'header': No files required - 'overview': One TXT file - 'claim_review_chart': No files required (custom chart configuration can be provided). Approved Files (Grouped by Element Type): **overview**: ./data/aetna_email.txt - ./data/combined_email.txt - ./data/provider_email.txt **table**: ./data/aetna_claim_review_summary.csv **claim_review_chart**: - No files required (can contain custom configuration). Element Attributes You can also pass in custom element dictionaries to control specific sections. The following keys are supported depending on the element type: **Common Across Custom Elements** - 'element_type' (required): One of: 'header', 'overview', 'table', 'claim_review_chart' - 'supporting_files': Required for all but 'header' - 'title': Options for all elements except 'header' (required there) - 'prompt': Only applies to 'overview' **Per Element Details** - 'header': - Required:</p>

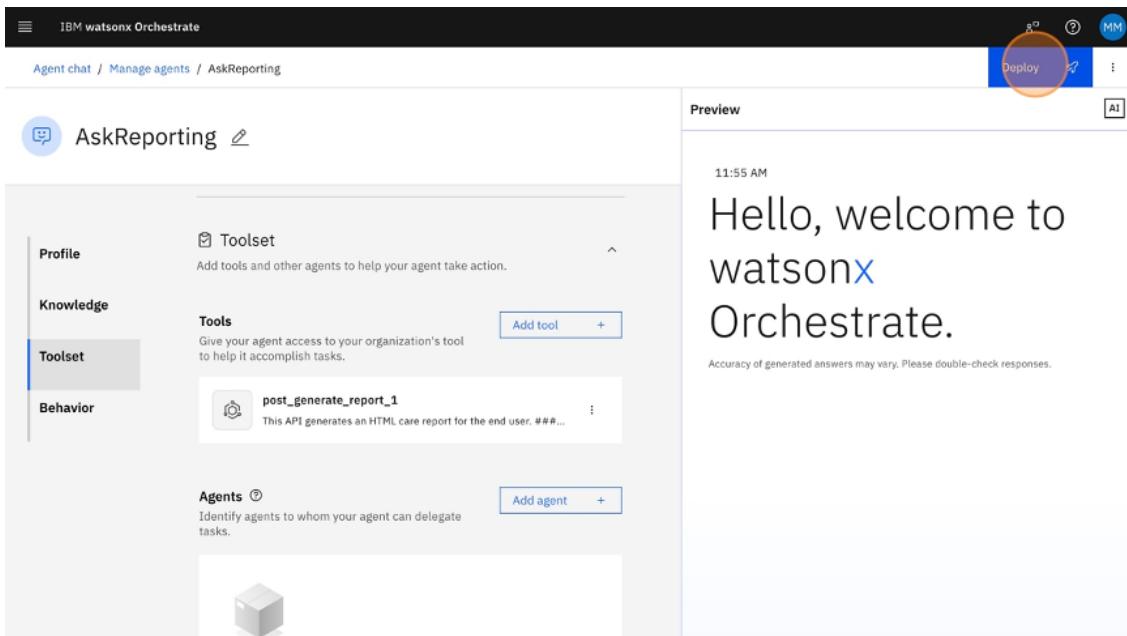
Generate Performance Report

1. Click "Done"

Operations

Name	Method	Description
<input checked="" type="checkbox"/>	POST	<p>This API generates an HTML care report for the end user. How It Works - The input is a **JSON array**, where each item can be: 1. A **string** referencing the predefined section 'care_report', 2. A **dictionary** defining custom report elements: 'table', 'header', 'overview', or 'claim_review_chart'. Predefined Section Key - 'care_report': This is the only prebuilt section available. It can be modified with additional elements (headers, overviews, tables, and claim review charts). Custom Sections You can pass individual report elements as dictionaries. The allowed custom elements are: - 'table': CSV file - 'header': No files required - 'overview': One TXT file - 'claim_review_chart': No files required (custom chart configuration can be provided). Approved Files (Grouped by Element Type): **overview**: ./data/aetna_email.txt - ./data/combined_email.txt - ./data/provider_email.txt **table**: ./data/aetna_claim_review_summary.csv **claim_review_chart**: - No files required (can contain custom configuration). Element Attributes You can also pass in custom element dictionaries to control specific sections. The following keys are supported depending on the element type: **Common Across Custom Elements** - 'element_type' (required): One of: 'header', 'overview', 'table', 'claim_review_chart' - 'supporting_files': Required for all but 'header' - 'title': Options for all elements except 'header' (required there) - 'prompt': Only applies to 'overview' **Per Element Details** - 'header': - Required: 'element_type', 'title' - Optional: none - Example: `` json { "element_type": "header", "title": "Custom Header" } `` - 'overview': - Required: 'element_type', 'supporting_files[0]' - Optional: 'title', 'prompt' - Example: `` json { "element_type": "overview", "supporting_files": ["./data/aetna_email.txt"], "title": "Aetna Claims Overview", "prompt": "Summarize the Aetna claims overview in markdown." } `` - 'table': - Required: 'element_type', 'supporting_files[0]' - Optional: 'title' - Example: `` json { "element_type": "table", "supporting_files": [</p>

1. Click "Deploy" to activate your AskReporting agent



IBM WatsonX Orchestrate

Agent chat / Manage agents / AskReporting

AskReporting

Profile

Knowledge

Toolset

Toolset

Add tools and other agents to help your agent take action.

Tools

Add tool +

post_generate_report_1

This API generates an HTML care report for the end user. ###...

Agents

Add agent +

Agents

Identify agents to whom your agent can delegate tasks.

Preview

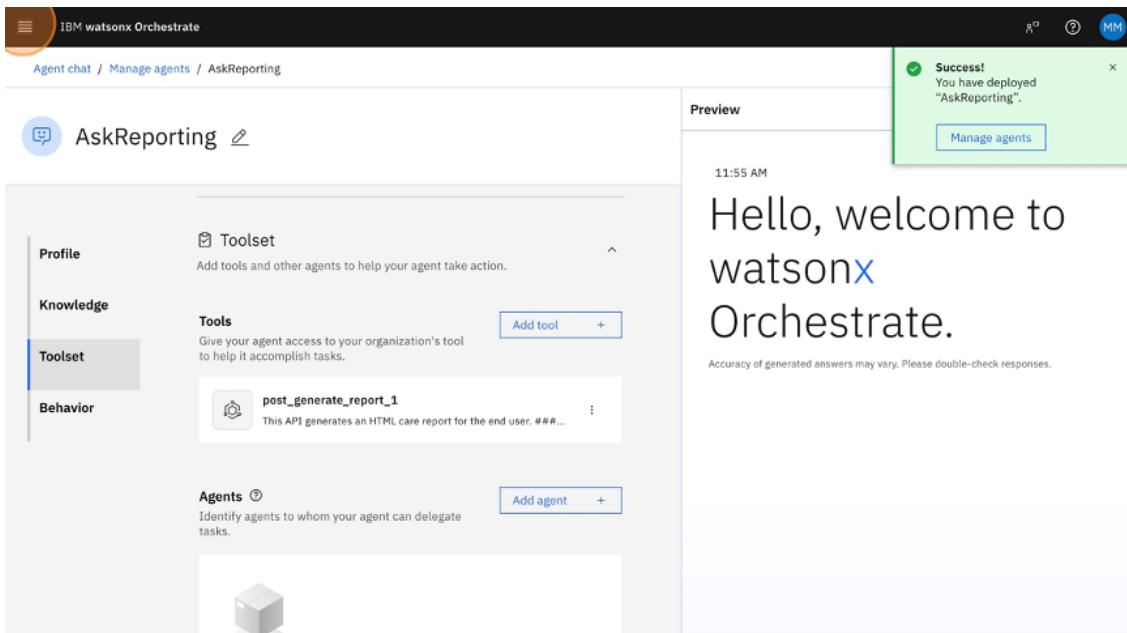
11:55 AM

Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

3. Switching to and Testing the Agent

1. Click on the menu icon in the top left corner



IBM WatsonX Orchestrate

Agent chat / Manage agents / AskReporting

AskReporting

Profile

Knowledge

Toolset

Toolset

Add tools and other agents to help your agent take action.

Tools

Add tool +

post_generate_report_1

This API generates an HTML care report for the end user. ###...

Agents

Add agent +

Agents

Identify agents to whom your agent can delegate tasks.

Preview

11:55 AM

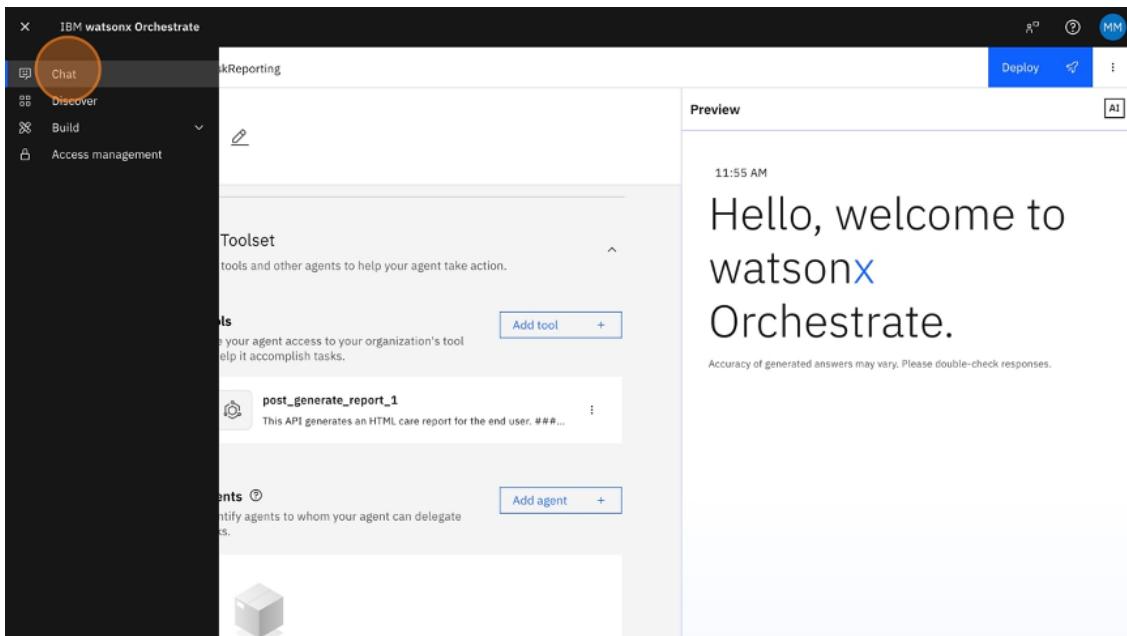
Success!
You have deployed "AskReporting".

Manage agents

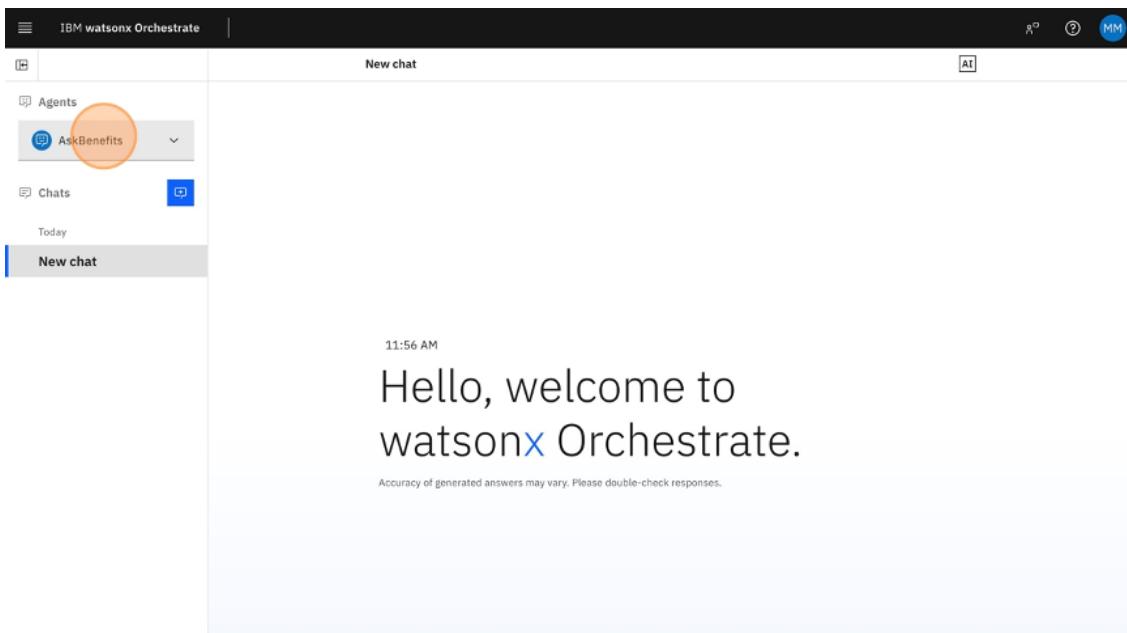
Hello, welcome to watsonX Orchestrate.

Accuracy of generated answers may vary. Please double-check responses.

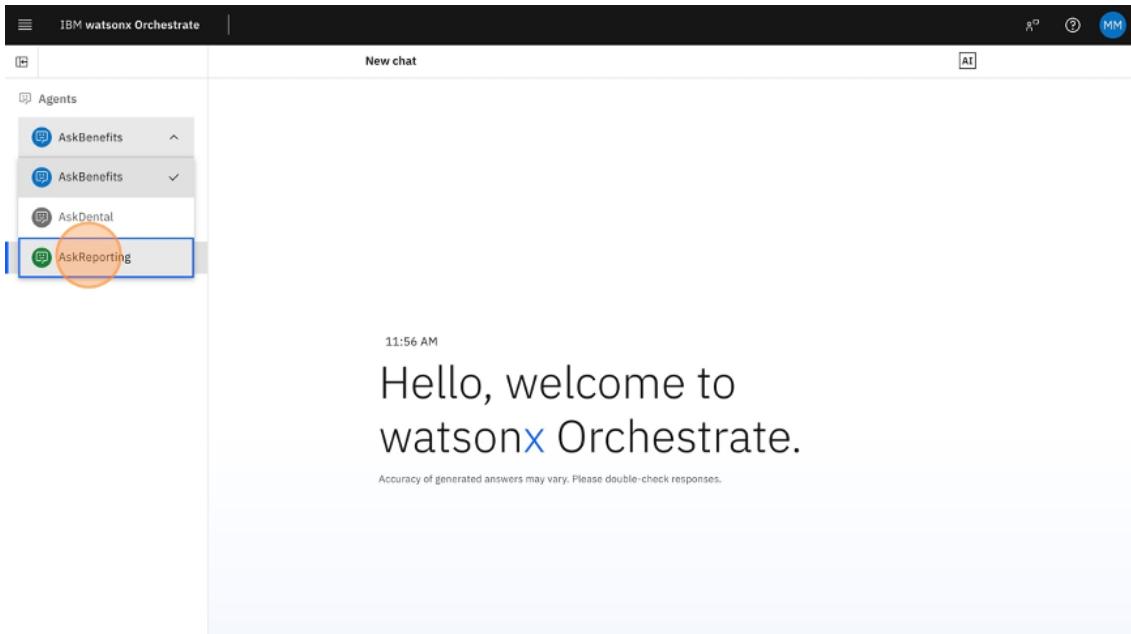
1. Click on "Chat"



1. Click "AskBenefits" Dropdown



1. Select "AskReporting"



Final Testing Scenarios

After successful deployment, test the AskReporting agent with the following sample prompts to verify functionality, clicking the generated urls to view reports:

- 1. Ask for a Default Report:** Please create a care report
- 2. Ask for a Custom Report:** Please create a care report with an additional section that translates the email from the provider into layman terms