

IBM Cloud Pak for business automation

Demos & Labs 2024

watsonx Orchestrate x AI Assistant builder x IBM
RPA

V 1.0

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1 Introduction

Watsonx Orchestration Lab

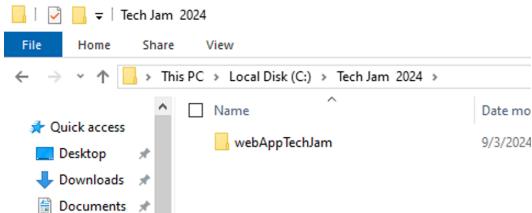
IBM Watsonx Orchestrate is an AI and generative automation solution that powers your business by automating tasks, streamlining complex processes, and ultimately saving time and effort for you and your team. IBM Watsonx Orchestrate offers:

- **Pre-built apps, skills, and wizards:** The skills catalog contains thousands of predefined skills to help you perform a wide variety of tasks.
- **AI Assistant Builder:** Quickly and easily create and deploy your purpose-built AI assistant with helpful conversations that help end users get the job done.
- **Skill Studio:** Create your own custom skills and workflows without any coding experience.
[More information here.](#)

Lab Run Time: 3 hours

2 Requirements for the laboratory

1. Have the webApptechJam app in the C:/Tech Jam 2024/ directory



Note: these files were sent by email to the participants of the laboratory, if you have not received them you can download them through the Official Git

<https://github.com/AldoJustiniano-01/Tech-Jam-2024>

Note: The script that is already published to your tenant accesses this directory and runs the index.html web file in the path C:/Tech Jam 2024/webAppTechJam

2. Access to LA Tech sales tenant, tenant must have been granted access, otherwise ask lab administrators.

Nome	Modificado por	Modificado	Permitir agendamento	⋮
insuranceAutoTechJam	Marco Crepaldi	03/09/2024	<input checked="" type="checkbox"/>	

3. Acesso as URLs <https://us1app.rpa.ibm.com/> e <https://dl.watson-orchestrate.ibm.com>

3 Case Introduction

3.1 Customer Scenario

With the significant growth in the volume of operations in the insurance business unit, Focus Corps Bank faces challenges related to high demand and associated operating costs. Given the small team and time required to acquire new resources, the organization identified the need for an innovative solution to streamline the customer service process when it comes to insurance quotes. In response to this need, the Automations team was in charge of developing a technological solution capable of automating the online quote service through the insurer's portal. The main objective is to reduce the pressure on Customer Service (SAC) by ensuring that customers can access quotes quickly and autonomously, without the need for immediate human intervention.

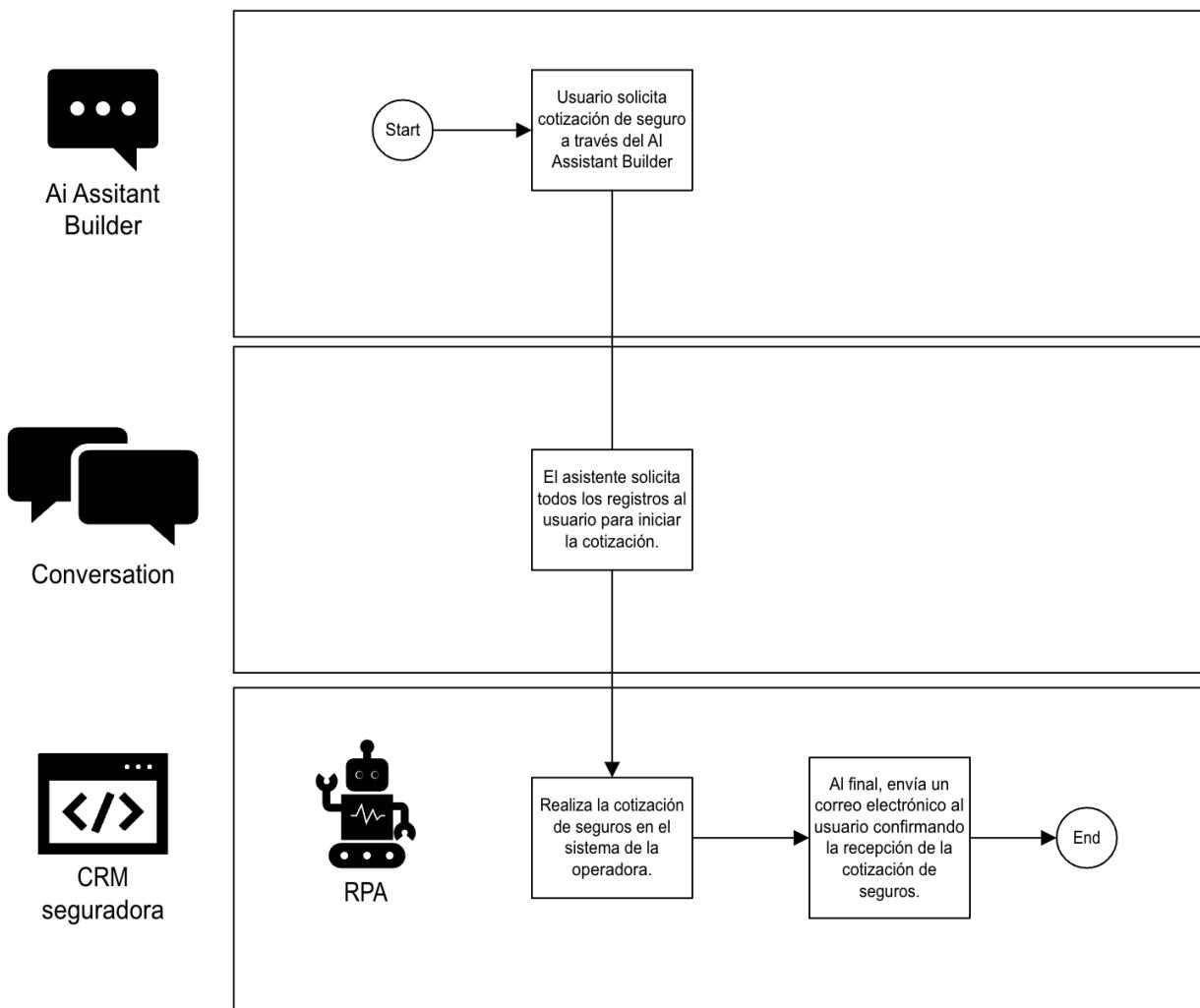
The implementation of this solution will bring tangible benefits, such as the reduction of operating costs, the improvement of service efficiency and the freeing up of resources for higher value-added activities. In addition, automation will provide a faster and more convenient experience for customers, promoting greater satisfaction and retention. This initiative represents an important step towards the modernization of Focus Corps Bank's internal processes, reinforcing its commitment to deliver innovative and efficient solutions in the insurance sector.

3.2 Proposed solution.

To achieve these results, the automation team integrated **watsonx Orchestrate** into the operation, allowing them to exploit the full potential of this technology. The process was structured with the following elements:

- **watsonx Orchestrate:** The business team developed a custom skill in Watson Orchestrate, capable of seamlessly integrating with IBM RPA. This integration made it possible to automate quotes in the insurance company's portal, eliminating manual steps and streamlining the process.
- **AI Assistant Builder:** With this tool, the business team developed an intuitive flowchart that facilitates direct interaction with users on the insurer's main portal. The information collected during this conversation is automatically sent to watsonx Orchestrate, ensuring that all relevant data is processed accurately.
- **IBM RPA:** This system captures the parameters generated in the conversation with the customer and, in an automated way, performs the query in the insurer's internal systems. At the end of the process, IBM RPA generates an email with the quote information and sends it directly to the requester, providing a faster and more efficient experience.

3.3 Macro Fluxogram



4 Exercise: IBM RPA

4.1 Introduction to IBM RPA activities.

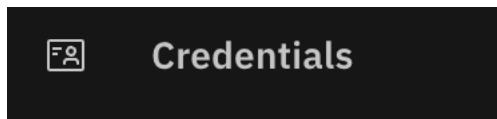
In this lab, the **InsuranceAuto.wal** script, developed specifically to automate the insurance quoting process, is published to the control center and will be triggered directly by **watsonX Orchestrate**. For the integration between solutions to be effective, it is necessary to follow some important steps:

Create a project in IBM RPA Control Center: The first step is to set up a new project within Control Center to ensure that IBM RPA has the resources it needs to run the script efficiently.

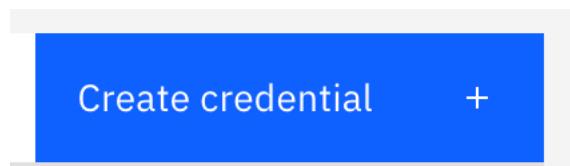
Extract the OpenAPI file: After configuring the project, the next step is to extract the OpenAPI file, essential to define the communication interface between the systems and ensure the correct execution of the automated processes.

4.2 Create a credential

1. Access the side menu and click on "**Credentials**": Locate the menu on the left side of the screen and select the "Credentials" option to proceed with the setup.



2. Click on the "**Create credential**" button to begin the process of creating a new credential.



3. Enter a name for the **credential**: In the field provided, enter a descriptive name that makes it easy to identify the new credential.

Criar credencial

Nome

Credencial Maquina IBM RPA Marco

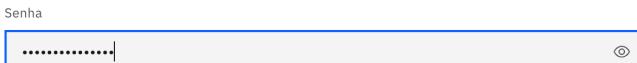
Nome do usuário

Nome do usuário

marco.crepaldi

4. Enter the name of the **Windows unlock user**: In the appropriate field, enter the name of the user that will be used to unlock the computer on the Windows operating system.

5. Enter the **user's password**: In the field provided, enter the password corresponding to the Windows unlock username



6. Click **Create**



4.3 Edit your computer

7. Go to the side menu and click "**Computers**": In the menu on the left of the screen.



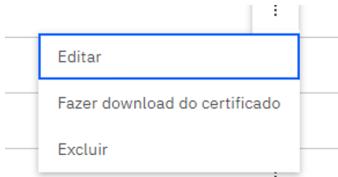
8. Click **Computers**.



1. **Find and locate your computer's name in the table**: Use the available search field to make it easier to find your computer. Once you find them in the list, click on the three dots next to their name to access the options.



2. Click **Edit**



3. Select Credential

Nome
C4502V1

Credencial (opcional)
Escolher uma opção
LAPTOP-OTF1JN39 - credential
login VM Fyre - Crepaldi
MRRCredential
MRRDemoCredential

Status
Des
Des
Des
Des
Des

4. Click **Save**

Save

4.4 Creating a Machine Group

5. Click "Computers" in the left-side menu

Computers

6. Click on **Computer groups**

Computer groups

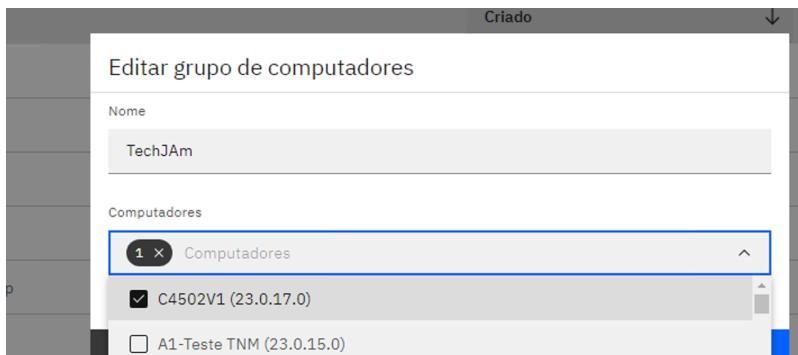
7. Haga clic en **Create computers group**.

Create computer group +

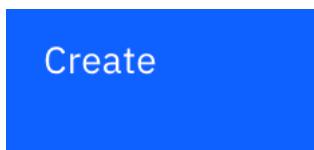
8. **Enter the name of the group:** In the field provided, enter the name of the group. In this example, the name "TechJam" was used.

Nome
TechJam

9. **Select the computer:** Choose, from the list, the computer where the script that manipulates the insurance company's system will be executed. Be sure to select the correct machine to ensure that the process is activated in the right environment.



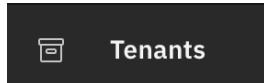
10. Click **Create**



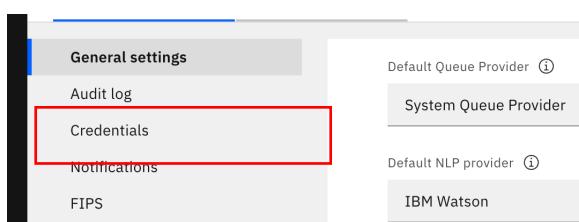
4.5 Configure Private Key

Configuring **public and private keys** is a crucial process for data security in various applications, especially in asymmetric cryptography. This method uses two different keys to secure communication and ensure the authenticity of the data.

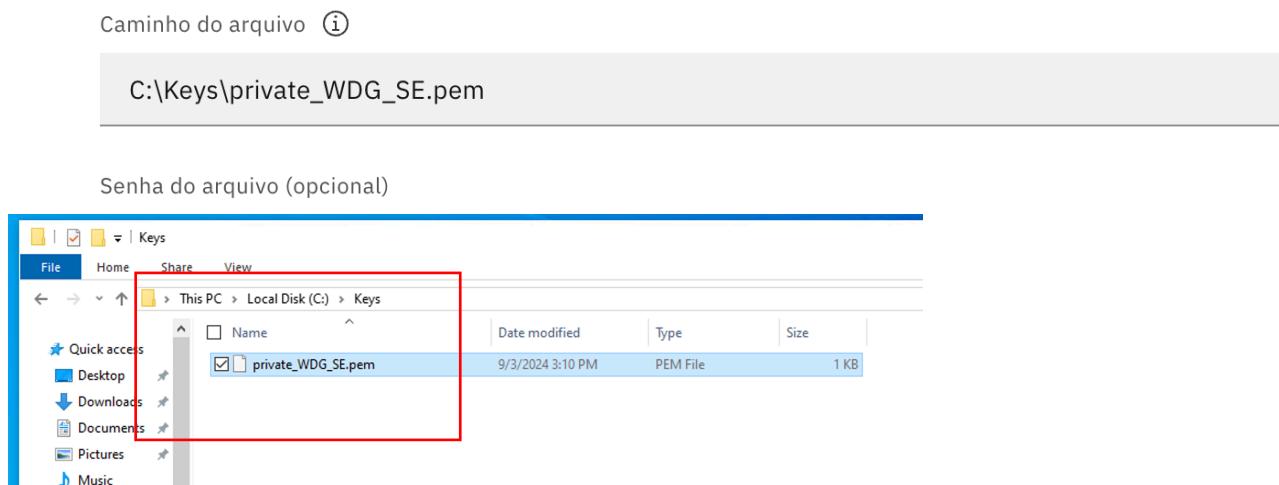
11. Click on "**Tenants**" in the left side menu.



12. Click on "**Credentials**".

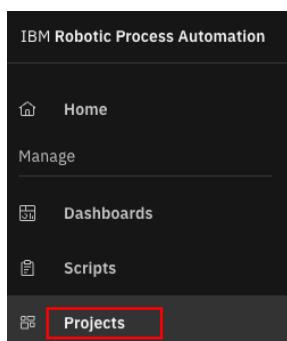


13. **Verify the path of the private key:** Confirm the path where the private key should be stored and create the corresponding directory in your environment, as shown in the image below.

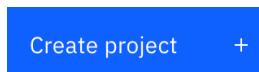


4.6 Create project

14. Click on "**Projects**" in the menu on the left side.



15. Click on "**Create project**".



16. Create Project Screen

Fill in the "Name" field: Since you are using the same Control Center with several users, it is important to avoid duplication in the creation of projects. To ensure exclusivity, please enter your name before the project name. For example, if your name is Marco, name the project "**MarcoInsuranceAuto**".

17. Under Shared Access (optional), select "**Everyone.**"
18. Enter a **Description** for the project.
19. Click **Create**.

Create project x

Name
InsuranceAuto

Unique ID (i)
insuranceauto

Share access (optional)
1 × Teams ▼

Share access to your project with other teams

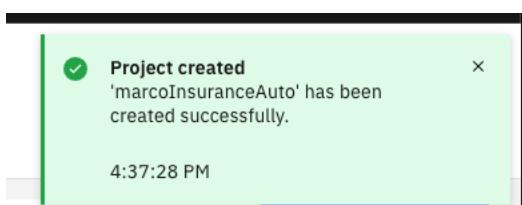
Description 27/300
Description insurance auto

💡 G

Cancel Create

20. Success Message

Success message: Once the project is created, a success message will be displayed confirming that the process has been completed successfully.



4.7 Add a robot to your project

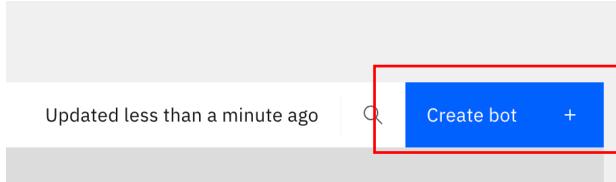
21. Under "**Manage Projects**", locate your project: Find the project you created, which should contain the format "**YourWebSafeName**", and click on it to open it.

Manage projects

Projects allow you to organize your Bots and Counters.

The screenshot shows a list of projects. One project, "marcoInsuranceAuto", is highlighted with a red box around its name in the "Name" column.

22. Click "**Create bot**".



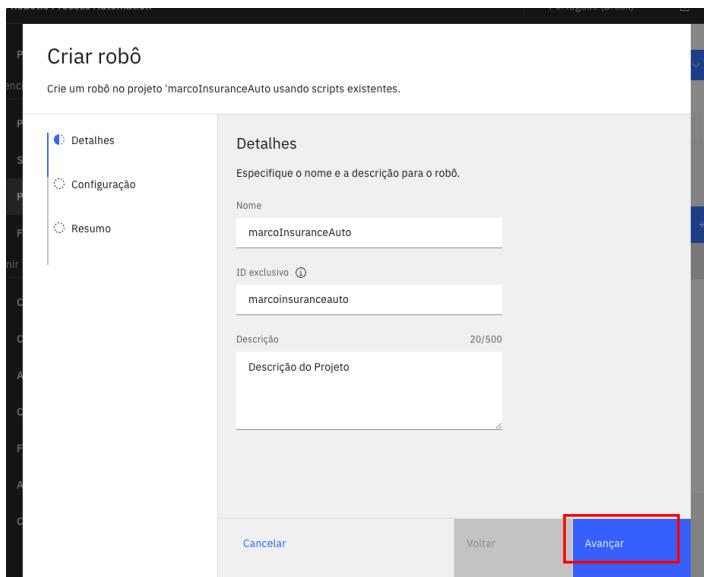
23. Give the project a name, since we are using the same tenant, to avoid duplications, each user must customize the name of the project. Specify a name that begins with your own name. Example: "**"MarcoInsuranceAuto"**".

The screenshot shows the "Detalhes" (Details) page for creating a new bot. The "Nome" field contains "marcoInsuranceAuto" and is highlighted with a red box.

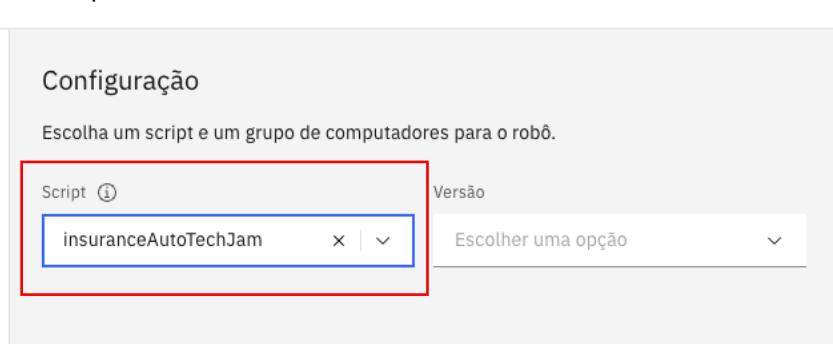
24. Provide a description.

The screenshot shows the "Descrição" (Description) page for creating a new bot. The "Descrição do Projeto" field has a character count of "20/500".

25. Click **Next**



26. Select the script.

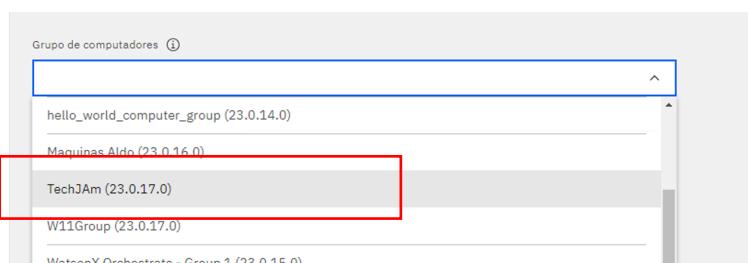


27. Select the latest version.

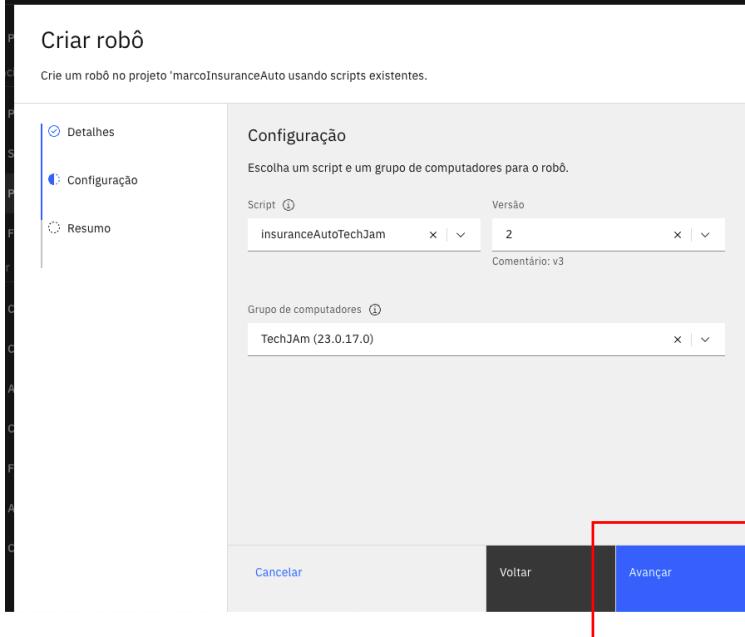


Note: Always opt for the latest version. New versions may be released according to the development needs of this laboratory.

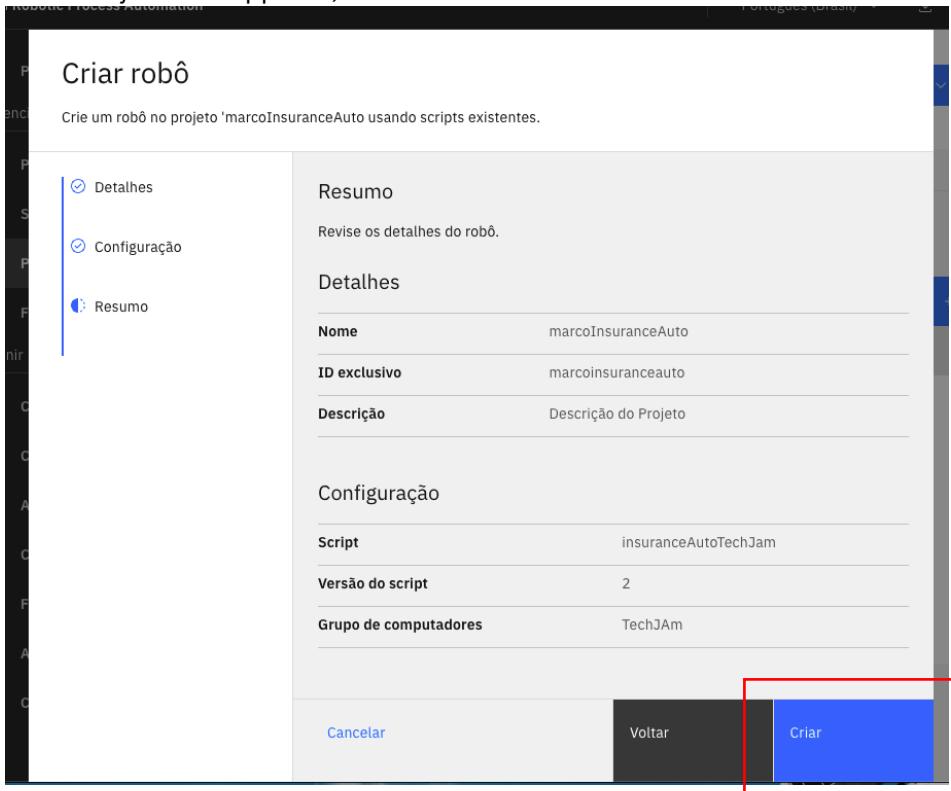
28. Select the computer group.



29. Click **Next**.



30. The Summary screen appears, and then click "**Create**".



31. A message will appear



4.8 Exercise: Download OpenAPI

4.9 Introduction to OpenAPI

An OpenAPI file is a document that describes the structure of an API, including its paths, methods, parameters, and responses, in a standardized format, usually using JSON or YAML. It allows developers and tools to easily understand and interact with the API, making it easy to document, test, and integrate.

Integration with Watsonx Orchestrate is done through an API, where several communication parameters are defined in this file.

Nota: <https://www.ibm.com/docs/en/rpa/23.0?topic=projects-downloading-openapi-document>

4.10 Descargar da OpenAPI

32. Click Download "Download openAPI" and save the file to your directory.

4.11 Exercise: watsonx Orchestrate, how to publish a Skill.

4.12 Introduction

A "Skill" in **WatsonX Orchestrate** is an automated capability or action that WatsonX can perform on behalf of the user. Skills allow WatsonX Orchestrate to integrate and interact with different applications, tools, or systems, performing specific tasks such as scheduling meetings, sending emails, obtaining data, or processing information in real time.

These skills are powered by APIs or predefined workflows and are built to automate repetitive processes and increase efficiency. The user can orchestrate multiple skills into a larger workflow to meet their operational needs in a smarter, more automated way.

4.13 Criar Skill no watsonx Orchestrate.

33. Acesse a URL <https://dl.watson-orchestrate.ibm.com/>
34. Enter User.
35. Enter the password.
36. Click Sign In.

IBM

Log in to IBM

IBMid

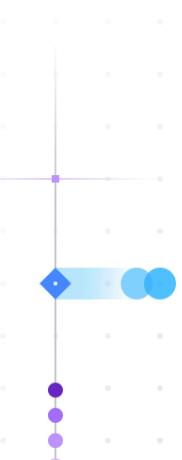
Continue →

Remember me ⓘ

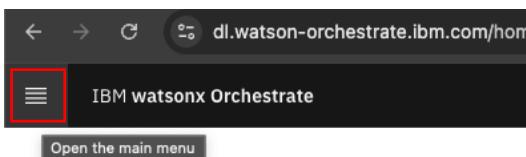
Don't have an account?

Create an IBMid →

Forgot IBMid? [Contact the IBMid help desk](#)



37. Click on the burger

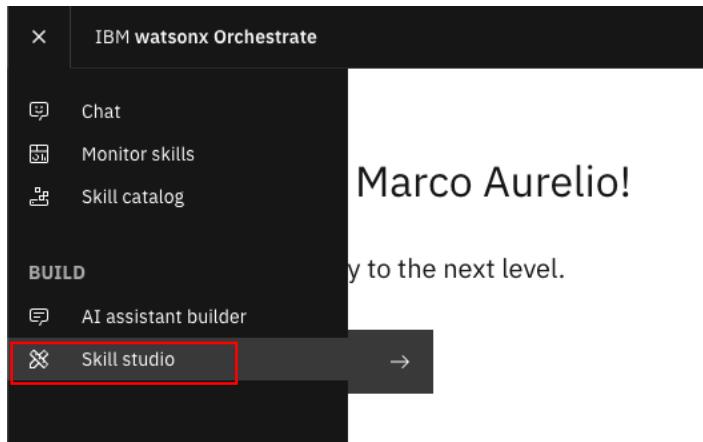


Welcome, Marco Au

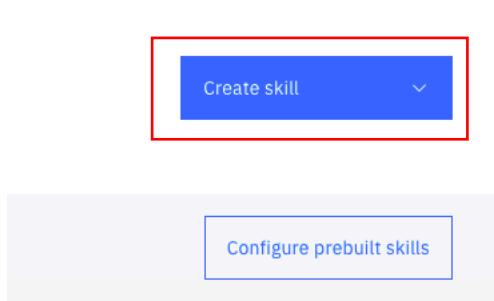
Take productivity to the next level

Debs070513\$

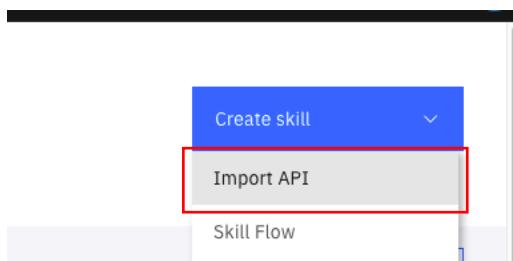
38. Click Skill Studio



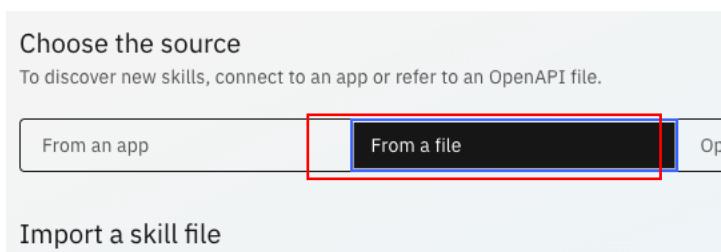
39. Clique em Create Skill



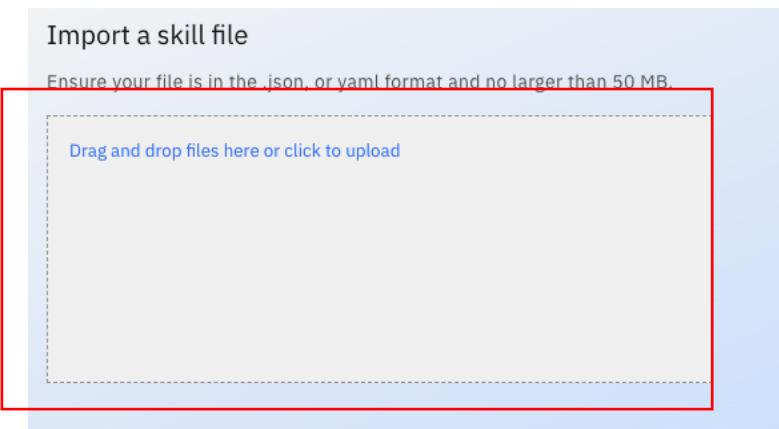
40. Click Import API



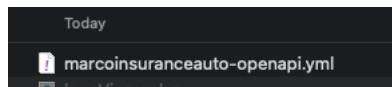
41. Select the From a file option



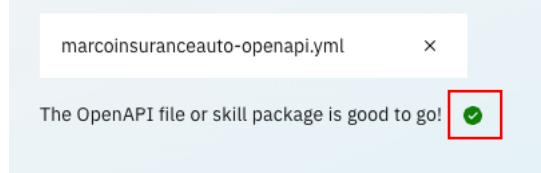
42. Drag the file or select it in the upload area



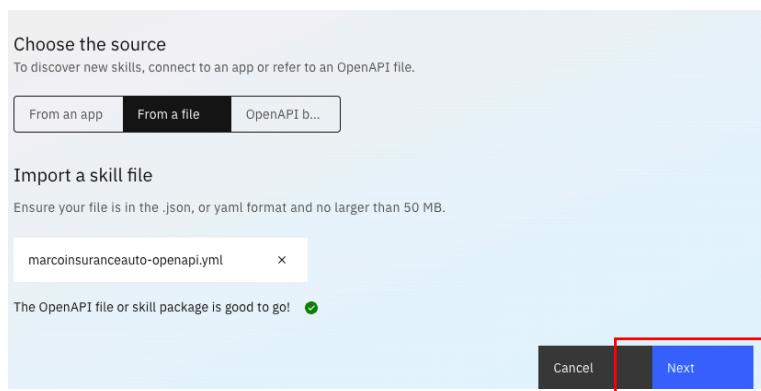
In this step, you will drag the . YML, which is the open API that you downloaded from IBM RPA control center projects. It will have your name and the name of the project you created.



43. A checkmark should be displayed when uploading the file.



44. Click **Next**



45. Select Skill

1 out of 1 selected		
Skill	Description	Status
<input checked="" type="checkbox"/> marcoInsuranceAuto	<i>description not found</i>	<input checked="" type="checkbox"/> Ready to add

46. Click **Add**



47. A success message will be displayed, you can manually close this message.



48. The skill will be ready for publication

Status	Skill type	Author	Last edited	⋮
<input checked="" type="checkbox"/> Ready to publish	Imported	marco.crepaldi@ibm.com	September 02 2024	

49. Click on the three dots of your Skill and click on **Enhance this skill**

Last edited		⋮
ibm.com	September 02 2024	
com	August 31 2024	<input type="button" value="Enhance this skill"/>

50. Click **Publish**

Name*: marcoInsuranceAuto

Description: Enter the description

API version*: 1.0.0

Preview

The skill will look like this in the catalog.

marcoInsuranceAuto

The skill will look like this in the skill set.

marcoInsuranceAut o

Cancel **Publish** **Save as draft**

Note: On this screen we can configure all user interaction in the handling within the watsonx orchestration chat, but for this lab we will create user interaction through the AI Build wizard.

51. A display message will be posted. You can manually close this message.



4.14 Exercise: Exporting a Skill

4.15 Introduction

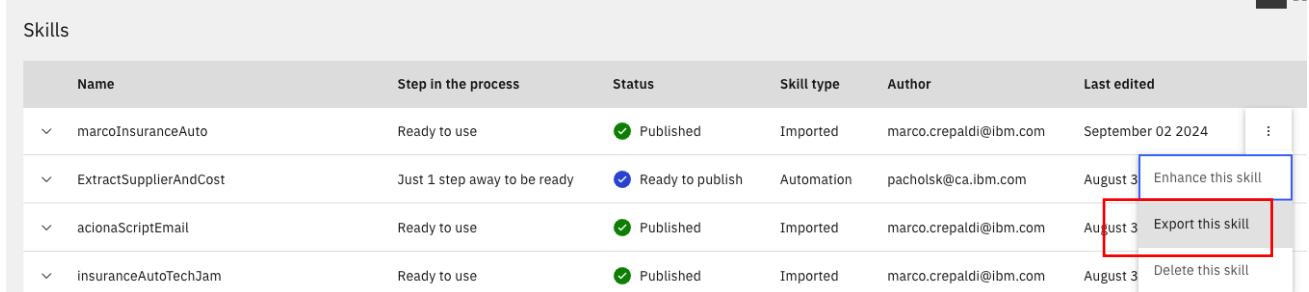
In this lab, we'll integrate watsonx Orchestrate with AI Assistant Builder. To do this, you'll need to export a skill .json file. The following are the steps to perform this procedure:

4.16 Export these skills

52. To locate the skill list, you need to locate and click on the three dots of the skill.

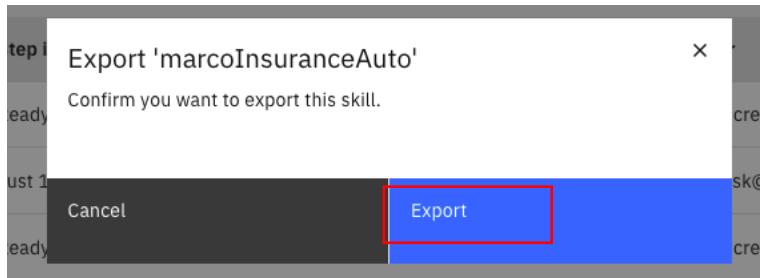
Name	Step in the process	Status	Skill type	Author	Last edited	More
marcoInsuranceAuto	Ready to use	✓ Published	Imported	marco.crepaldi@ibm.com	September 02 2024	⋮

53. Clique em **export this skill**.



Name	Step in the process	Status	Skill type	Author	Last edited	
marcoInsuranceAuto	Ready to use	Published	Imported	marco.crepaldi@ibm.com	September 02 2024	
ExtractSupplierAndCost	Just 1 step away to be ready	Ready to publish	Automation	pacholsk@ca.ibm.com	August 3	Enhance this skill
acionaScriptEmail	Ready to use	Published	Imported	marco.crepaldi@ibm.com	August 3	Export this skill
insuranceAutoTechJam	Ready to use	Published	Imported	marco.crepaldi@ibm.com	August 3	Delete this skill

54. Click **Export** this skill and save it to your directory.



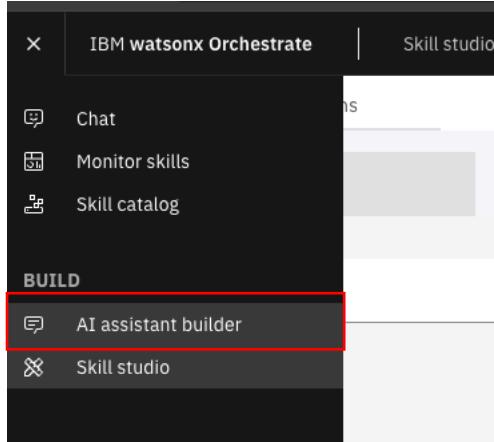
4.17 Exercise: Create a new AI Builder Wizard/Wizard

4.18 Introduction to Ai Assistant Builder

In this exercise, we'll start creating a conversation flow in **Ai Assistant Builder**. To do this, it is essential that each user creates their own dashboard, especially since we are sharing the same environment in this lab. In this way, we guarantee a better use of the available resources. In addition to the dashboard, we'll also create a new integration using a skill.json file. Next, we'll develop a conversation flow that will collect all the logs that will be sent via API to watsonx Orchestrate, which in turn will trigger the insuranceAuto.wal script on IBM RPA.

4.19 Creating a New Attendee

55. From the main menu on the left side, go to **Ai assistante builder**



When the AI Assistant Builder is accessed for the first time, the assistant will need to be customized. If there are already other previously created wizards, steps 58 through 61 will not be displayed. In that case, continue from item 62

56. Create your first attendee

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: Marco Insurance Auto
Your assistant name will be kept internally and not visible to your customers

Description (optional): Descrição
9/128

Assistant language: English (US)
This is the language your assistant will speak.

Next

57. Customize your wizard and click Next

Welcome to AI assistant builder

Back Next

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?
E-commerce

What is your role on the team building the assistant?
Developer

Which statement describes your needs best?
I want to provide confident answers to common questions

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... ➤

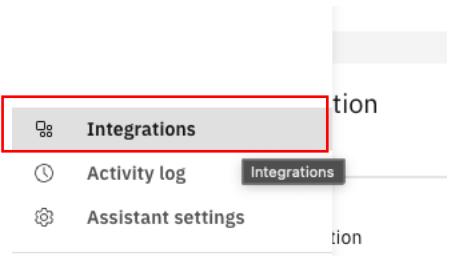
58. Customize your attendee and click **Next**

The screenshot shows the 'Customize your chat UI' section of the AI assistant builder. On the left, there are settings for the assistant's name, intended purpose (Standard), theme (Light selected), colors (primary: #FFFFFF, secondary: #3D3D3D, accent: #0354E9), and size. A large circular preview area on the right shows a dark gray placeholder for an avatar. To the right of the preview is a sample conversation window with a message: 'Hi! I'm a virtual assistant. How can I help you today?'. Below the conversation are three examples: 'Example: Find nearby location', 'Example: Check account balance', and 'Example: See how I can help'. At the bottom right is a 'Powered by IBM watsonx' logo.

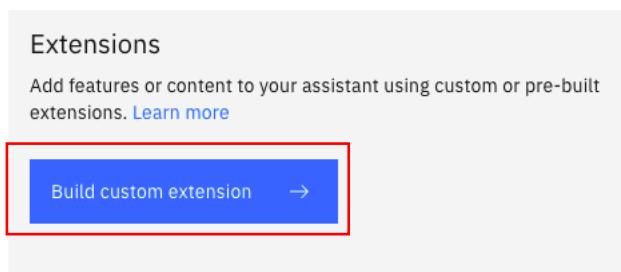
59. Click **Create**

The screenshot shows the 'Preview your assistant' section of the AI assistant builder. It displays a sample website layout with a dark blue header bar containing the text 'Sample website'. To the right is a preview of the AI assistant's chatbot window, identical to the one shown in the previous screenshot. The preview includes the greeting 'Hi! I'm a virtual assistant. How can I help you today?' and the same three examples: 'Example: Find nearby location', 'Example: Check account balance', and 'Example: See how I can help'. At the bottom right is a 'Powered by IBM watsonx' logo.

60. From the menu on the left, select the **Integrations option**



61. Clique em **build custom extension**



62. Click **Next**

A screenshot of the 'Custom extension' setup page. At the top, there's a header with the IBM Watsonx Orchestrate logo, AI assistant builder, TechJam Brasil dropdown, and some icons. Below the header, the title 'Custom extension' is displayed. To the right of the title are 'Close' and 'Next' buttons; the 'Next' button is highlighted with a red box. The main content area is titled 'Get started' and contains instructions: 'Create a custom extension to tailor the experience for your customers.' and 'Steps to setting up custom extensions:'. A numbered list follows:

63. Give a name to the extension "Auto Insurance"

64. Enter a description

65. Click Next

Custom extension

Close **Next**

Get started Basic information Import OpenAPI Review extension

Basic information

Having a clear name and detailed description will help provide context and clarity to what your extension does.

Extension name
Insurance Auto

Extension description
Descrição Insurance Auto 24/128

66. Drag or select your skill's .json file

67. Click **Next**

Custom extension

Close **Next**

Get started Basic information Import OpenAPI Review extension

Import OpenAPI

Import an OpenAPI document in a .json format, describing the authentication and methods for your extension.

Drag and drop file here or click to upload

marcoInsuranceAuto.json **X**

68. A review will be displayed
69. Click to expand integration details

Custom extension

[Close](#)

[Finish](#)

Review extension

Review the servers and extension resources provided in the OpenAPI document.

Review authentication

Provided is a list of the authentication methods found within the OpenAPI document.

Authentication type	Required fields
OAuth 2.0	Password flow: client ID, client secret, username, password

Review servers

Provided is a list of the servers and server variables found within the OpenAPI document.

URL	Description	Variables
https://br1api.rpa.ibm.com/v2.0/workspace/a918b9f8-4833-4579-bf00-b896e56a5e2a/projects/marcoinsuranceauto/bots/		

Review operations

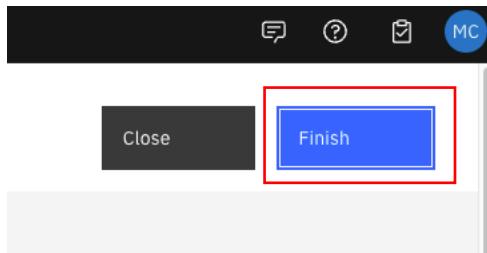
This table shows the operations defined in the OpenAPI document.

Operation	Method	Resource
▼ marcoInsuranceAuto	POST	/marcoinsuranceauto

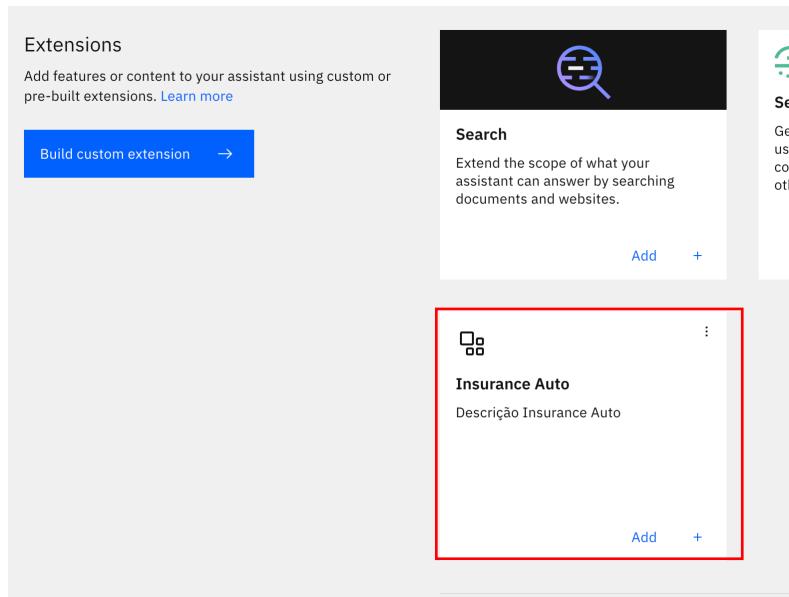
70. All integration parameters will be displayed

Request parameters		Response properties	
callbackUrl string Optional		jobId string	
name string Optional		project string	
maritalStatus string Optional		botName string	
address string Optional		status string	
cgcpcf string Optional			
city string Optional			
licenceDrive string Optional			
state string Optional			
age string Optional			
zipcode string Optional			
sex string Optional			
commercialUse string Optional			
emailCustomer string Optional			

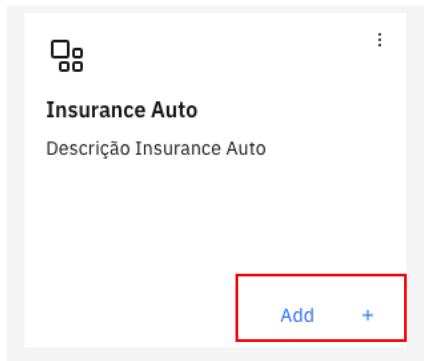
71. Click **Finish** to finish creating the extension.



72. Under **Extensions**, find the extension that was just added.



73. In the Auto Lock extension, click **Add+**, this action will make it accessible to be triggered in the AI Assistant Builder conversation flow



74. Click **Add**



75. The extension is almost published, at the moment it is in Draft
76. Click next

The screenshot shows the 'Custom extension' screen in the AI assistant builder. At the top, there are navigation tabs: 'Get started' (selected), 'Authentication' (highlighted with a red box), and 'Review operations'. Below the tabs, the section title 'Get started' is displayed, followed by a brief description: 'Descrição Insurance Auto'. A heading 'How to add a custom extension to AI assistant builder:' is present, followed by two steps: 1. Use your credentials to authenticate the access necessary to add your extension. 2. Review the mapped variables table to ensure that the correct responses are available before adding the extension to your draft or live environment.

77. Select OAuth 2.0 authentication

78. Click **Next**

The screenshot shows the 'Authentication' configuration screen. The 'Authentication type' dropdown menu is open, showing 'No authentication' (selected) and 'OAuth 2.0' (highlighted with a red box).

79. For **Grant type**, select **password**

80. For **Client ID**, enter a dummy value in this product version that is not yet being validated.

81. For **Client Secret** file, enter a dummy value in this version of the product that is not yet being validated.

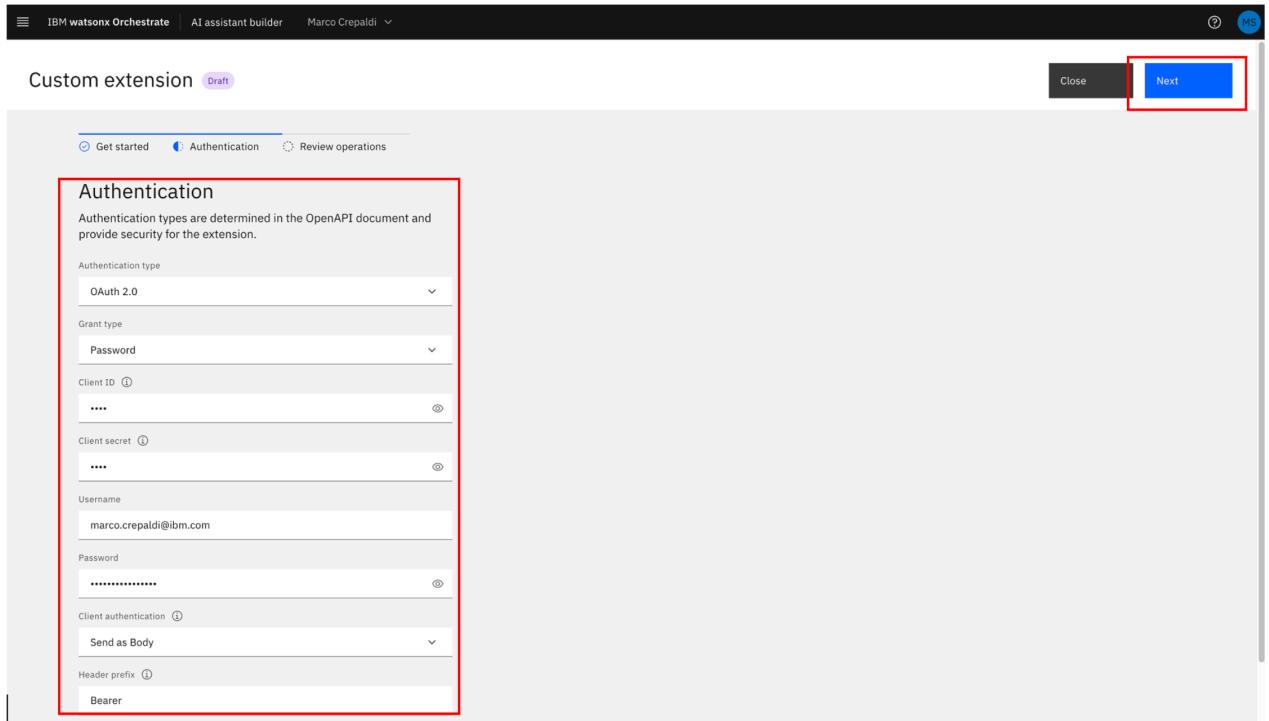
82. In the Username field , enter the IBM RPA control center user

83. In the **Password** field , enter the login password associated with the IBM RPA user

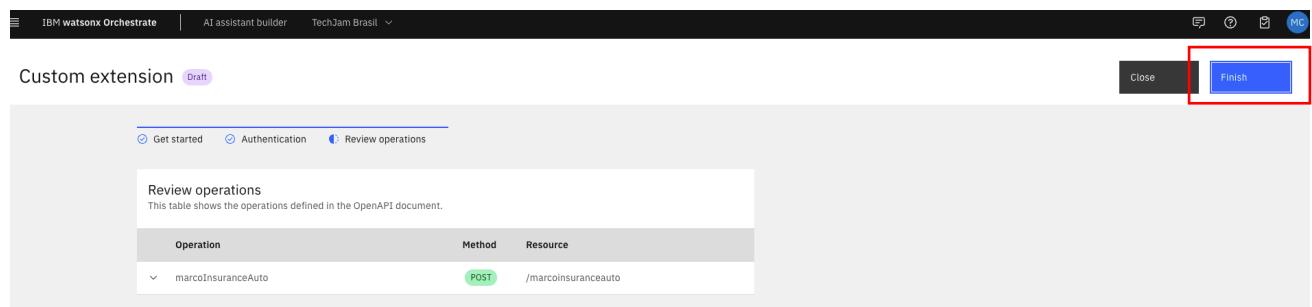
84. In Client **Authentication**, select **Send as Body**

85. In the **Header Prefix** field, select **Bearer**

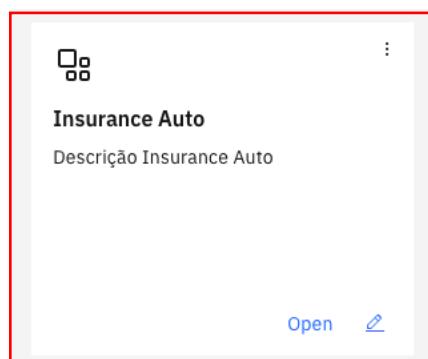
86. Click **Next**



87. Click **Next**



88. Added the extension



4.20 Exercise: Creating the Conversation Flow Variables

4.21 Introduction

In this process, as the records will be collected through the AI Assistant Builder chat, we need to create the variables to use in the conversation flow, they can be created at any time, but in this document we will create them all in advance.

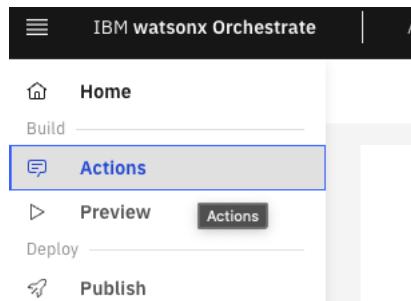
Below is the layout:

Name	Guy
Name	Free text
maritalStatus	Free text
address	Free text
CGCCPF	Free text
City	Free text
licenceDrive	Free text
state	Free text
age	Free text
zipcode	Free text
sex	Free text
commercialUse	Free text

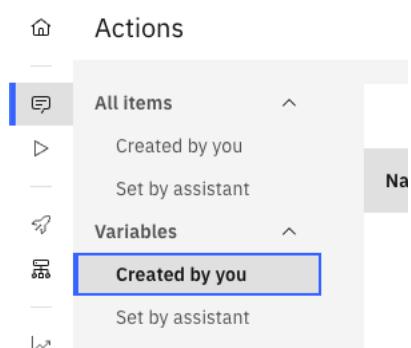
emailCustomer	Free text
---------------	-----------

4.22 Exercise Statement - Create Variables

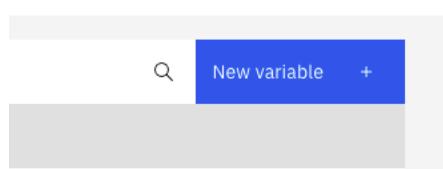
89. Click **Actions**



90. Seleccione **Created by you**



91. Clique em **New Variable**



92. In the Name field, type the name of the first variable "name"

93. In the Type field, select "**Free Text**"

94. Click **Save**

Session variable

Name: name

Type: Free text

Initial value (optional):

Description (optional):

Privacy: Protect data stored in this variable

Cancel Save

95. Repeat the same process for all the variables in the table from exercise **8.1**, at the end of the process you will have a table like this one as an example.

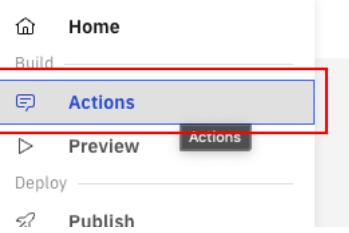
Name	Actions count	Initial value	Description	Variable ID	
Tr_name	0			name	
Tr_maritalStatus	0			maritalStatus	
Tr_address	0			address	
Tr_cgccpf	0			cgccpf	
Tr_city	0			city	
Tr_licenceDrive	0			licenceDrive	
Tr_state	0			state	
Tr_age	0			age	
Tr_zipcode	0			zipcode	
Tr_sex	0			sex	
Tr_commercialUse	0			commercialUse	
Tr_emailCustomer	0			emailCustomer	

4.23 Exercise: Creating the Conversational Flow

4.24 Introduction

Let's start our conversation flow! In this lab, we're going to take a simple route, but feel free to get creative when it comes to creating your own messages and interactions with users, or even adding new flows.

96. Click the Ai Assistant Builder side menu in **Actions**.



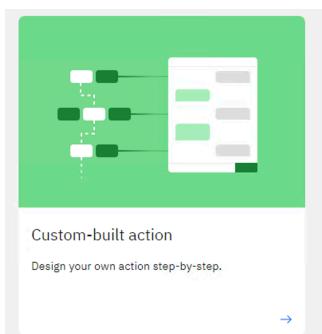
97. Clique em **Create Action +**

Create your first action

With actions, you can help your customers accomplish their goals.



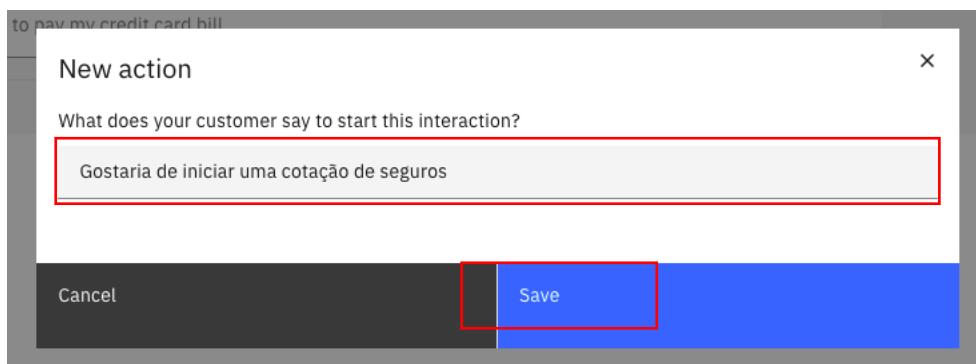
98. Clique em **Custom-built action**



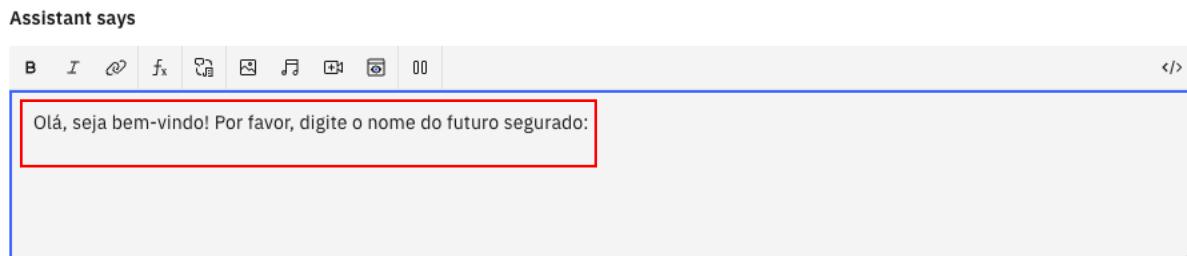
99. Now, let's write a sentence that will start the flow of the conversation.

100. Click **Save**

Note: In this lab, we'll only create one trigger phrase, but you can create multiple phrases that identify the desired scenario and start the flow of the conversation. In this example, the sentence that starts the flow is "I'd like to start an insurance quote"



101. Let's write the first question for the user



102. Haga clic **Define customer response**



Note: In this lab we will explore the options of **Options** and **Free Text**.

103. Select the **Free text response type**.

The screenshot shows the 'Define customer response' interface. On the left, there's a sidebar with 'System' at the top, followed by 'Options', 'Confirmation', and a red-bordered 'Free text' option. Below these are 'Regex', 'Number', 'Date', and 'Time'. Under 'Saved', there's a dropdown arrow. The main panel is titled 'Free text' with the sub-instruction 'Enable customers to write out any response using text input'. It shows a section 'As text' with the example 'My street is Main Street'.

104. Preview that the response type has been set to "**User enters free text**"

The screenshot shows the 'Assistant says' preview interface. At the top, there's a toolbar with various icons. The main area displays the message 'Olá, seja bem-vindo! Por favor, digite o nome do futuro segurado:' followed by a large empty text area. In the bottom right corner of this area, there's a red-bordered speech bubble containing the text 'User enters free text'.

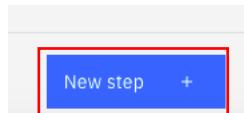
105. In the And **then** we'll select an action step, click Continue to next step

The screenshot shows the 'Continue to next step' options interface. There are two main sections: 'Continue to next step' (highlighted with a red border) and 'Re-ask previous step(s)' (disabled). The 'Continue to next step' section includes a sub-instruction: 'Follow the action's flow to whichever step is ordered next.' Below these are several other options: 'Go to a subaction', 'Use an extension', 'Search for the answer', 'Connect to agent', and 'End the action'.

And then



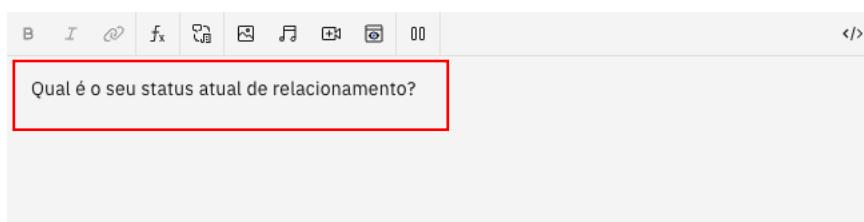
106. Click New Step to create the following user interaction box



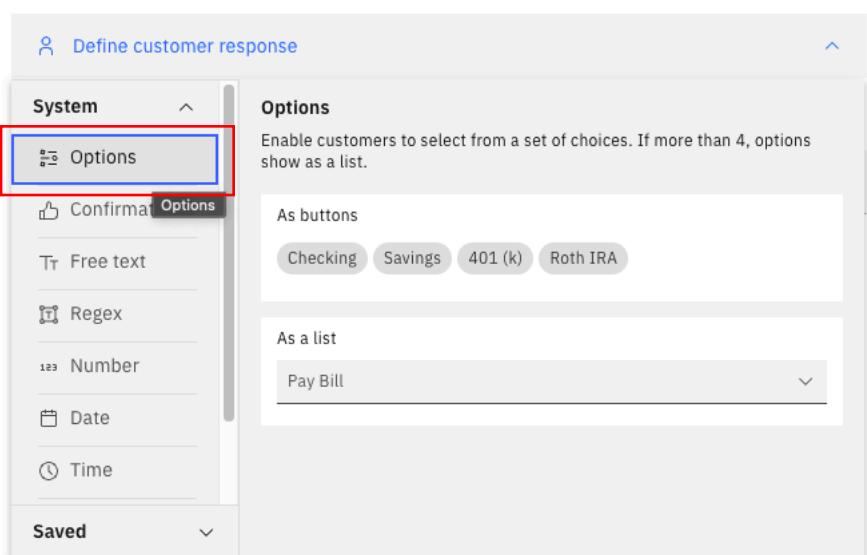
107. Enter the second question for the user "**What is your current filing status?**"

Note: The Front End that receives the insurance quote request accepts only two values as a response: "**Married**" and "**Single**". However, in the flow of the conversation, we will ask the question in Spanish to ensure correct understanding by the user. Because the response should be restricted to these two values, instead of allowing the user to type freely, we'll configure the flow to select the response from the predefined options.

Assistant says



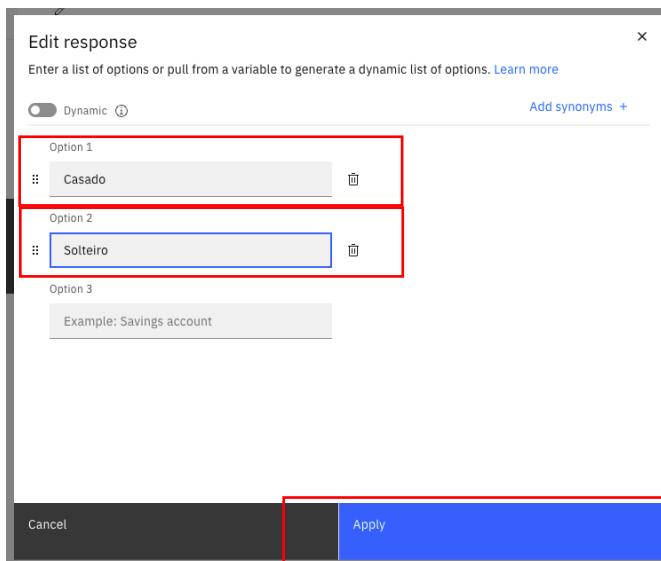
108. Under Define Customer Response, select the **Options option**



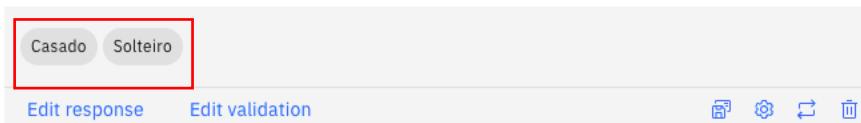
109. Enter the first option for the "**Married**" user

110. Enter the second option for the user "**Single**"

111. Click Apply



112. Both options have been defined for the user



113. Repeat the steps for all variables by typing a question to request the content of all the variables we created.

Note: The variables **Marital Status, Gender, Trade Use** must be of the **Option response** type listed below and which follows the layout that the front-end agrees to receive as values.

Variable Name	Amounts received
Marital status	Single or Married
Sex	Male or female
Commercial Use	Yes or no

The other variables are of the **Free Text type**

Note: The following table contains the variables that should be converted into questions to ask the user.

Question	Define the customer's response
address	Free Text

CGCCPF	Free Text
city	Free Text
licenceDrive	Free Text
state	Free Text
age	Free Text
Zip code	Option "Casado" o "Soltero"
sex	Option "Female" or "Male"
Commercial Use	Option "Yes" or "No"
e-mailCustomer	Free Text

Note: Now, let's map all the user-entered records through the Steps and associate them with a variable.

114. Create a New Step

New step +

115. Dentro do Step, clique em Set Variable Values

Step 12



Is taken

without conditions ▾

Set variable values



116. select Set new value

Variable values

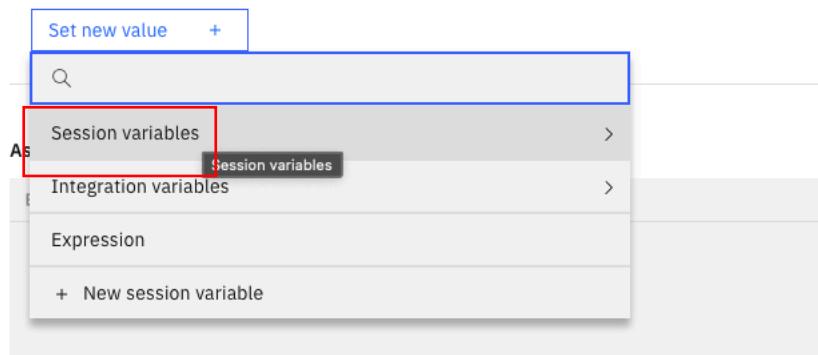
Set variable values. [Learn more.](#)



117. Seleccione Session Variables

Variable values

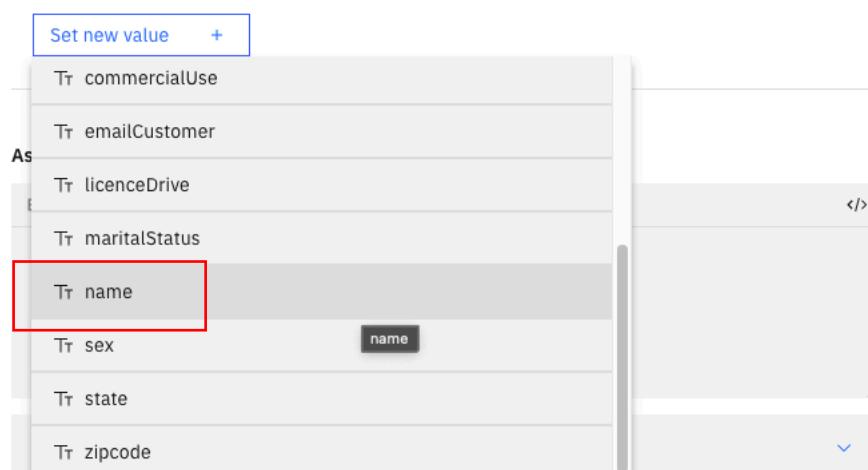
Set variable values. [Learn more.](#)



118. Select the name variable

Variable values

Set variable values. [Learn more.](#)



119. Seleccione Action step variables

Variable values

Set variable values. [Learn more.](#)

Set To

[Set new value](#) +

Assistant says

For example: What type of transfer would you like to

Enter text >

Expression >

Action step variables >

Session variables >

Assistant variables >

120. Select the step that references the name variable.

more.

The screenshot shows the Microsoft Flow editor interface. At the top, there's a header with a 'To' field and a search bar. Below the search bar is a list of variables:

- 1. Olá, seja bem-vindo! Por favor, digite ...
- 2. Qual é o seu ... Olá, seja bem-vindo! Por favor, digite o nome do futuro segurado:
- 3. Digite o seu endereço:
- 4. Digite o número do seu CPF ou CNPJ:
- 5. Digite o nome da cidade onde se loca...
- 6. Digite o número da sua Habilitação:

Variable values

Set variable values. [Learn more.](#)

Set **To**

Set new value +

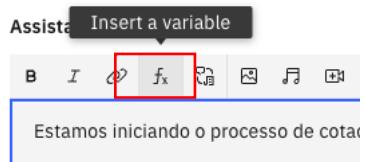
Note: Associate each variable with the step in which the user provided the answer. Make sure that all variables are correctly linked to their corresponding steps.

121. Associating the variable with the passage of the conversation flow, in the end you will have this table

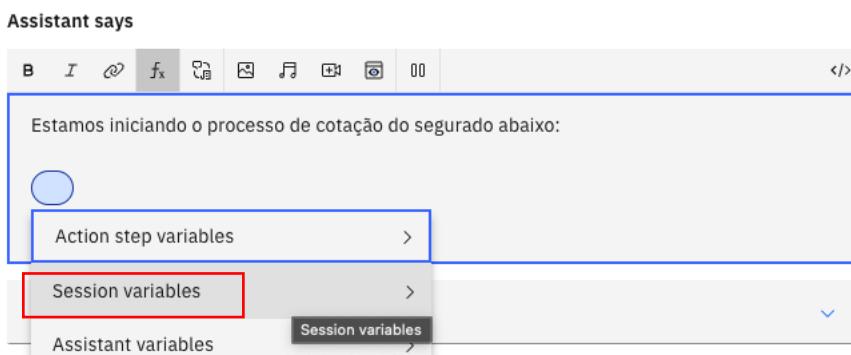
Variable values			
Set variable values. Learn more.			
⌘ Set	Tr name	▼	To 1. Olá, seja bem-vindo! Por fa...
⌘ Set	Tr maritalStatus	▼	To 2. Qual é o seu status atual d...
⌘ Set	Tr address	▼	To 3. Digite o seu endereço:
⌘ Set	Tr cgccpf	▼	To 4. Digite o número do seu CP...
⌘ Set	Tr city	▼	To 5. Digite o nome da cidade on...
⌘ Set	Tr licenceDrive	▼	To 6. Digite o número da sua Ha...
⌘ Set	Tr state	▼	To 7. Digite o nome do estado e...
⌘ Set	Tr age	▼	To 8. Quantos anos tem o condu...
⌘ Set	Tr zipcode	▼	To 9. Digite o Cep da cidade:
⌘ Set	Tr sex	▼	To 10. Selecione o sexo do cond...
⌘ Set	Tr commercialUse	▼	To 11. O condutor utiliza o imóv...

122. In the same **step** we will show all the records to the user, so that they are aware of the values written in a summary, for this we will create a text that we are starting the automation with the records.

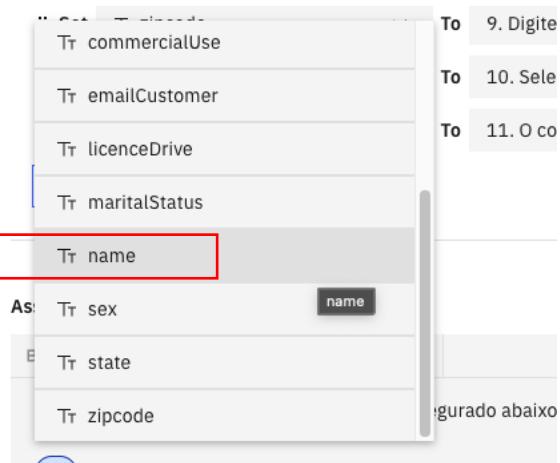
123. Click **Insert to Variable**



124. Type a message for the user and select Session Variables



125. Select the name variable



126. At the end, Step will display all the variables

Assistant says

B I @ fx ↻ ☰ 00 </>

Estamos iniciando o processo de cotação do segurado abaixo:

Nome do Segurado: `Tr name`

Status de relacionamento: `Tr maritalStatus`

Endereço : `Tr address`

CPF ou CNPJ: `Tr cgccpf`

Cidade: `Tr city`

Número da Habilitação: `Tr licenceDrive`

Estado: `Tr state`

Idade: `Tr age`

Cep: `Tr zipcode`

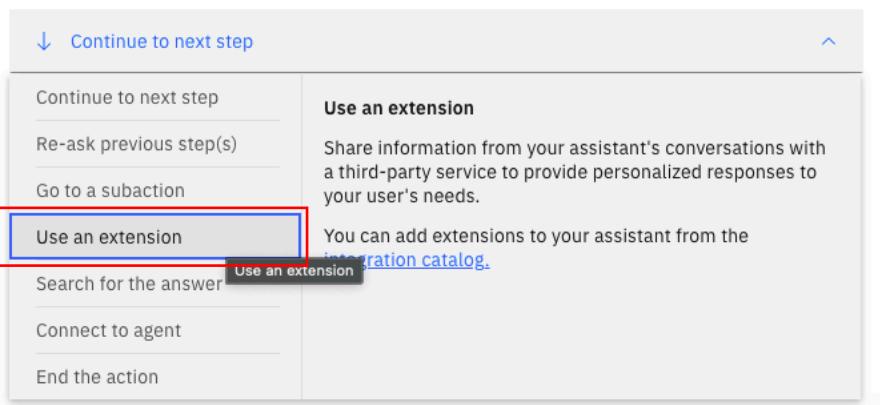
Sexo do Segurado: `Tr sex`

O Veículo é para uso: `Tr commercialUse`

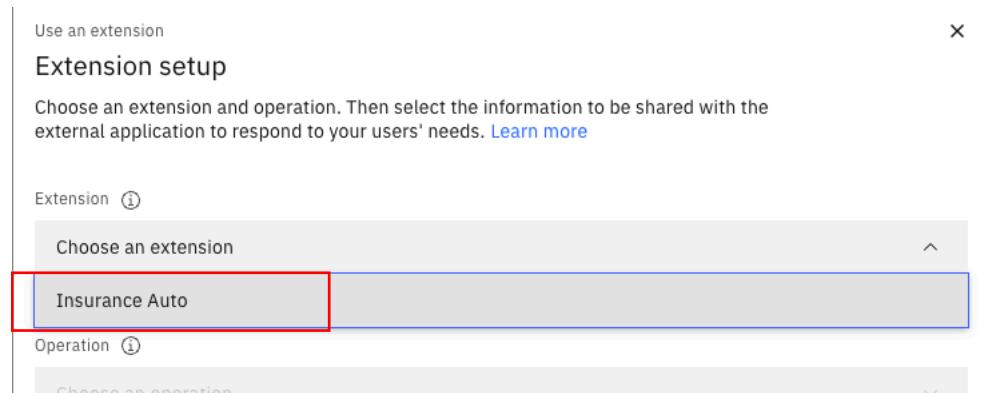
Note: The goal is to make sure that the insured sees all records clearly. Pay attention to the guidelines!

127. Agora em **And Then** clique em **Use na extension**

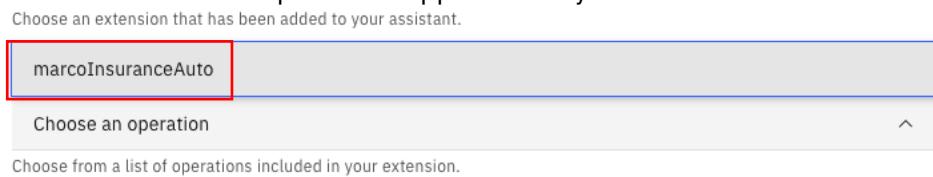
And then



128. Select the **Insurance Auto** extension



129. Operations: Select the option that appears with your **nameAutoInsurance**



130. All parameters will be loaded and must be associated with the corresponding question in the Step. The process is similar to that of creating the Step that shows all the variables to the user. The focus is now on ensuring that this correlation allows the API to send parameters correctly to Watsonx Orchestrate. Always remember to select 'Action Step Variable'



Step 13



Is taken

without conditions ▾

Delete variable values



Variable values



Set variable values. [Learn more.](#)

⌘ Set	Tr name	▼	To	1. Olá, seja bem-vindo! Por fa...	▼	X
⌘ Set	Tr maritalStatus	▼	To	2. Qual é o seu status atual d...	▼	X
⌘ Set	Tr address	▼	To	3. Digite o seu endereço:	▼	X
⌘ Set	Tr cgccpf	▼	To	4. Digite o número do seu CP...	▼	X
⌘ Set	Tr city	▼	To	5. Digite o nome da cidade on...	▼	X
⌘ Set	Tr licenceDrive	▼	To	6. Digite o número da sua Ha...	▼	X
⌘ Set	Tr state	▼	To	7. Digite o nome do estado e...	▼	X
⌘ Set	Tr age	▼	To	8. Quantos anos tem o condu...	▼	X
⌘ Set	Tr zipcode	▼	To	9. Digite o Cep da cidade:	▼	X
⌘ Set	Tr sex	▼	To	10. Selecione o sexo do cond...	▼	X
⌘ Set	Tr commercialUse	▼	To	11. O condutor utiliza o imóv...	▼	X
⌘ Set	Tr emailCustomer	▼	To	12. Digite o e-mail para receb...	▼	X

[Set new value](#) +

131. Click Apply

Apply

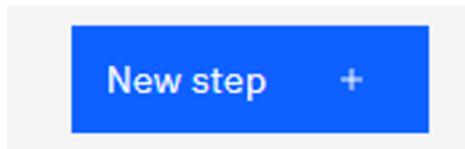
And then

Use an extension

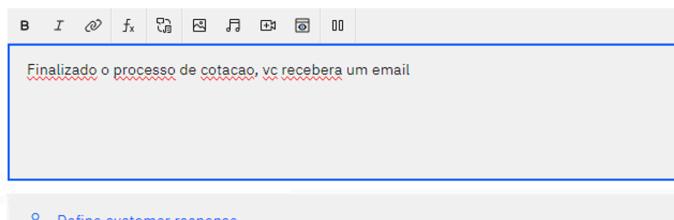
Extension	Integração Ai assistant com watsonx Orchestrate																																				
Operation	cotacaoSeguro																																				
Parameters	<table border="1"><tbody><tr><td>age</td><td>set to</td><td>5. Qual é a sua cidade?</td></tr><tr><td>sex</td><td>set to</td><td>8. Qual é a sua idade?</td></tr><tr><td>city</td><td>set to</td><td>10. Selecione o seu gênero</td></tr><tr><td>name</td><td>set to</td><td>1. Olá, qual é o seu nome?</td></tr><tr><td>state</td><td>set to</td><td>7. Qual é o seu estado?</td></tr><tr><td>cgccpf</td><td>set to</td><td>4. Qual é o seu CPF ou CNPJ?</td></tr><tr><td>address</td><td>set to</td><td>3. Digite o seu endereço:</td></tr><tr><td>zipcode</td><td>set to</td><td>9. Qual é o seu cep?</td></tr><tr><td>licenceDrive</td><td>set to</td><td>6. Digite o número da sua habilitação:</td></tr><tr><td>commercialUse</td><td>set to</td><td>11. O automóvel é para uso comercial?</td></tr><tr><td>customerEmail</td><td>set to</td><td>12. Digite o e-mail que deseja receber...</td></tr><tr><td>maritalStatus</td><td>set to</td><td>2. Qual é o status do seu relacionamento?</td></tr></tbody></table>	age	set to	5. Qual é a sua cidade?	sex	set to	8. Qual é a sua idade?	city	set to	10. Selecione o seu gênero	name	set to	1. Olá, qual é o seu nome?	state	set to	7. Qual é o seu estado?	cgccpf	set to	4. Qual é o seu CPF ou CNPJ?	address	set to	3. Digite o seu endereço:	zipcode	set to	9. Qual é o seu cep?	licenceDrive	set to	6. Digite o número da sua habilitação:	commercialUse	set to	11. O automóvel é para uso comercial?	customerEmail	set to	12. Digite o e-mail que deseja receber...	maritalStatus	set to	2. Qual é o status do seu relacionamento?
age	set to	5. Qual é a sua cidade?																																			
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customerEmail	set to	12. Digite o e-mail que deseja receber...																																			
maritalStatus	set to	2. Qual é o status do seu relacionamento?																																			

[Edit extension](#)

132. Create the last step to inform the user that processing is complete.



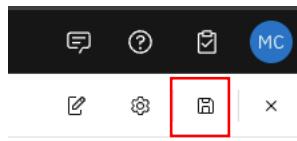
133. Enter a message indicating that the quotation process has been completed



134. And end the conversation flow by selecting And then = End Action

The screenshot shows the configuration for Step 14. The "Assistant says" section contains the message "Processo Finalizado", which is highlighted with a red box. The "Set variable values" button is also visible. Below this, the "And then" section contains the option "End the action", which is also highlighted with a red box.

135. Click Save at the top right.



4.25 Exercise: Final Test

4.26 Introduction

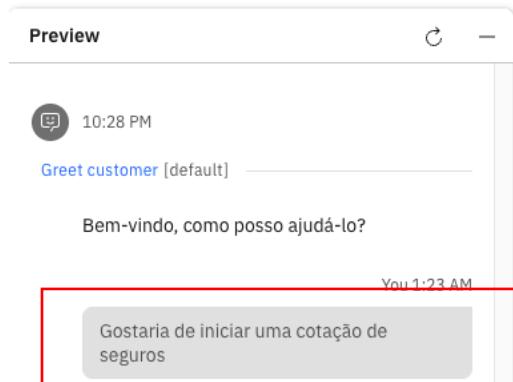
Now, let's run the conversation flow in the Watsonx Orchestrate test environment and interact with AI Assistant Builder. At the end of this interaction, the process should be completed.

4.27 Exercise Instruction

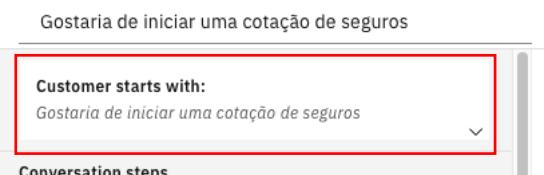
136. Click **Preview**



137. Type the message that starts the conversation flow: "**I'd like to start an insurance quote**"



Note: You can create as many triggers as you want by clicking the first box in the conversation flow and entering the new triggers.



138. The conversation flow will start
139. Complete the chat interaction
140. At the end of the chat interaction, AI Assistant Builder will activate the Watsonx Orchestrate skill, which in turn will activate IBM RPA. You will see the insurance interface displayed and the quote

records completed in the system. At the end of the process, an email confirming the request will be sent

Note: Running IBM RPA will interrupt the session.

4.28 Exercise: Implementing AI Assistant and Builder

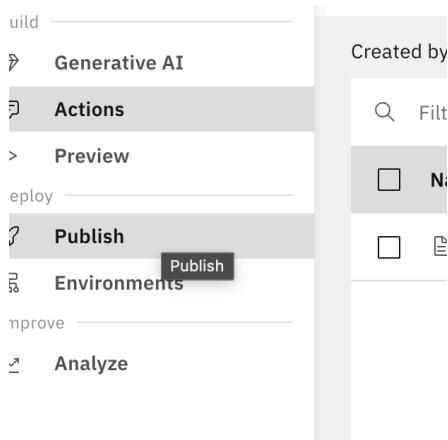
4.29 Introduction

After all the necessary testing and adjustments, we are ready to implement AI Assistant Builder on our customer's system. The main systems on which Watson Orchestrate's AI Assistant Builder can be deployed are:

1. **Web Applications**
2. **Mobile Apps**
3. **Internal Systems**
4. **Messaging platforms**
5. **Virtual assistants**
6. **Customer Service Portals**
7. **E-commerce environments**

4.30 Exercise Instruction

141. Click **Publish** in the AI Assistant Builder sidebar.

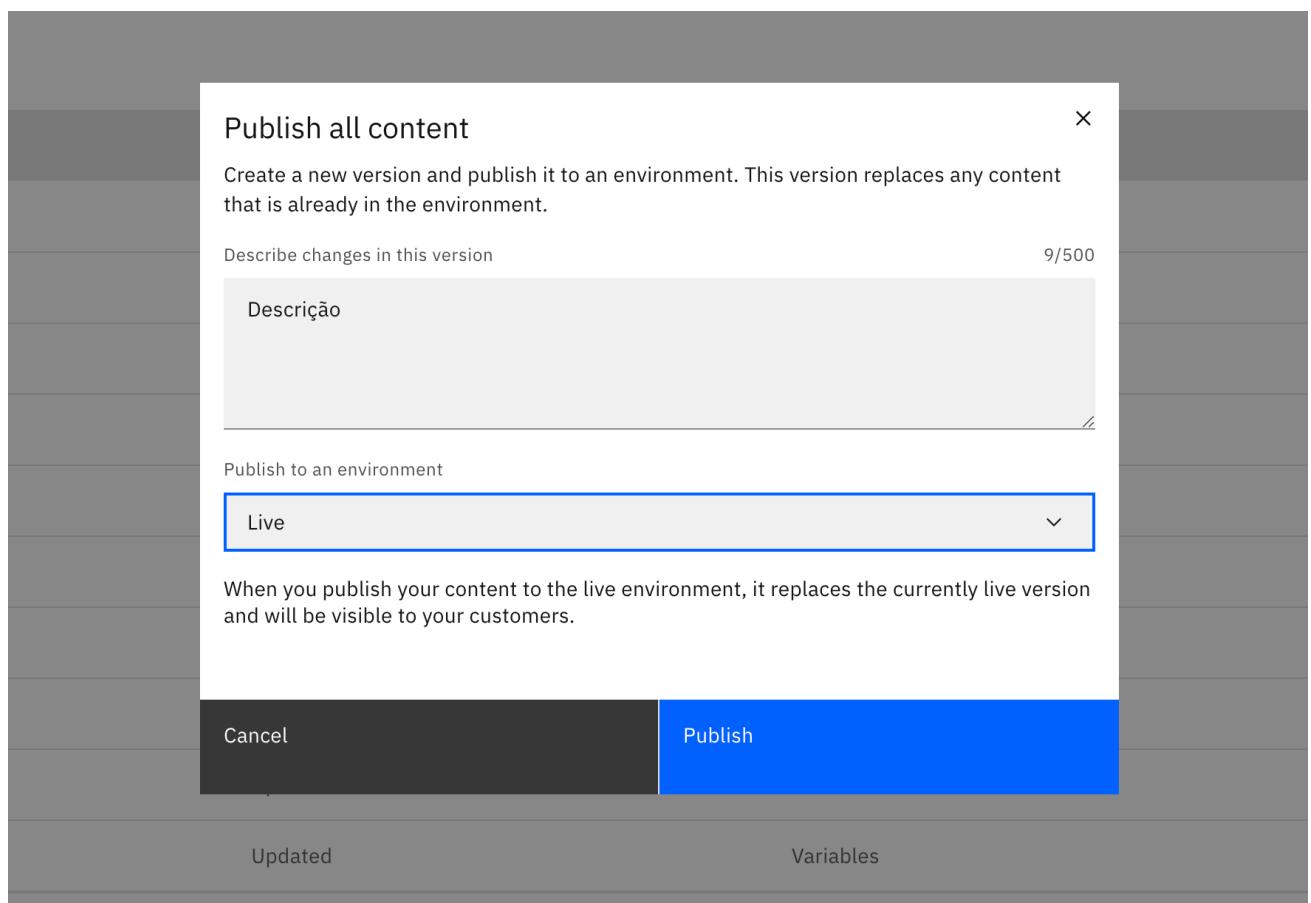


142. Click Publish

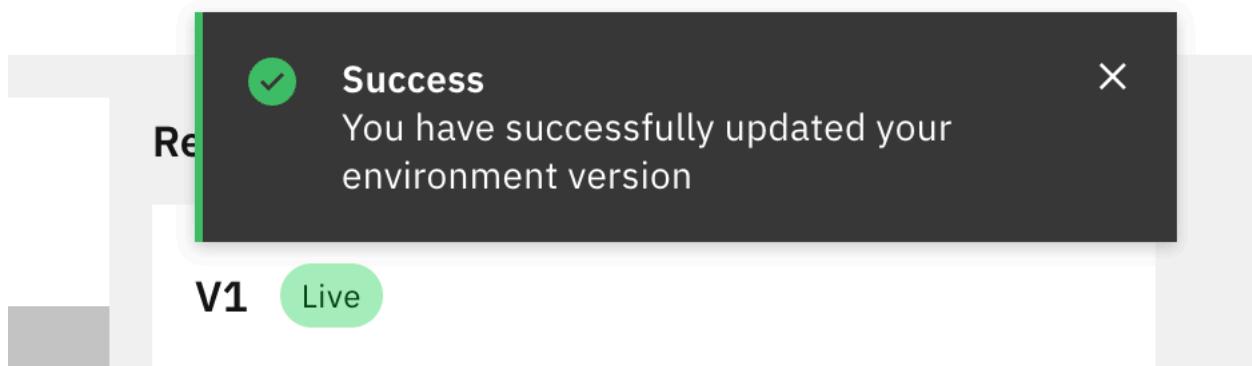
Publish

Unpublished content Changes to content made in your draft environment are reflected here.			
Draft content	Change type	Content type	Last modified
cotação de seguros	Updated	Actions	an hour ago
Actions Settings	Updated	Settings	14 hours ago
emailCustomer	Updated	Variables	a day ago

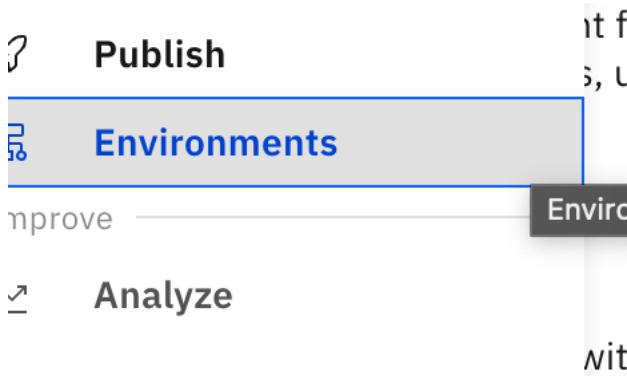
143. Enter a description and select **live** as the environment



144. A message of success should be displayed.

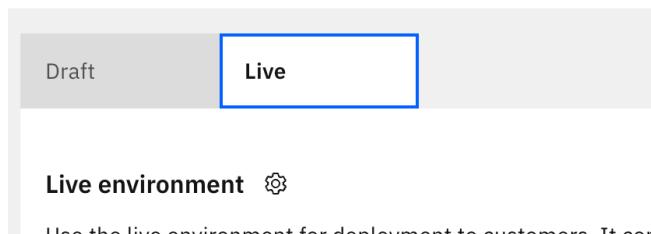


145. Click **Environments** in the left sidebar.



146. Click Live

Environments



147. Click on **web chat**

communication platforms.

Channels [Browse catalog](#)

Web chat

148. Chat Customization

Web chat

[Close](#) [Save and exit](#)

[Style](#) [Launcher](#) [Home screen](#) [Live agent](#) [Suggestions](#) [Security](#) [Embed](#) [Resources](#)

Customize your chat UI
Update the style to match your brand and your website. 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.

Add an avatar image

Choose a theme

Primary color Secondary color

Chat header User message bubble

Accent color Significant and interactive objects

Size
Width Height

IBM Watermark
[Enable IBM Watermark](#)

Assistant
Hi! I'm a virtual assistant.
How can I help you today?

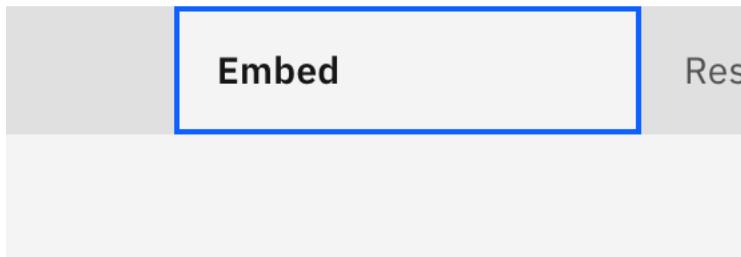
Example: Find nearby location
Example: Check account balance
Example: See how I can help

Type something...

Powered by **IBM Watson**

Note: In this laboratory we will not customize for time reasons.

149. Click Embed

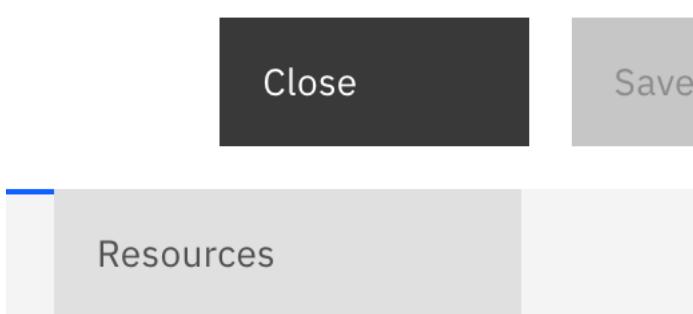


150. Click Copy to clipboard to copy the content.

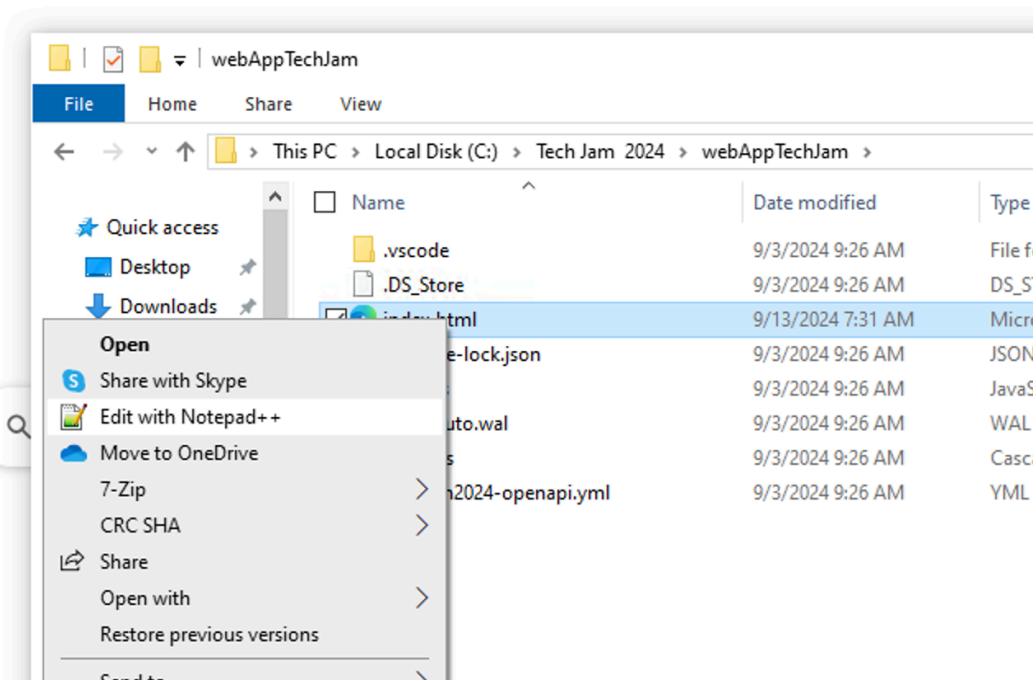
The screenshot shows a configuration page for embedding a chatbot. At the top left is a small icon of a square with a cross. Below it is a "Copy to clipboard" button with a blue outline and white text. The main title is "</> Embed on your website". Below the title is a sub-instruction: "Ready to launch? It's as easy as copy and paste. [Learn more](#)". A large code block is displayed, starting with a script tag and containing several lines of JSON-like configuration code. On the far right of the code block is a small icon of a square with a cross.

```
<script>
window.watsonAssistantChatOptions = {
  integrationID: "1808a023-4b72-40eb-ae76-72f355d12e2e", // The ID of this integration.
  region: "aws-us-east-1", // The region your integration is hosted in.
  serviceInstanceId: "20240901-1451-5614-70e1-a6b2e36e10be", // The ID of your service instance.
  onLoad: async (instance) => { await instance.render(); }
};
setTimeout(function(){
  const t=document.createElement('script');
  t.src="https://web-chat.global.assistant.watson.appdomain.cloud/versions/" + (window.watsonAssistantChatOpti
  document.head.appendChild(t);
});
</script>
```

151. Click **Close**



152. Edit the index.html file in the path C:\Tech Jam 2024\webAppTechJam



153. Enter the code inside the **body** tag

```
3     </head>
4
5     <body>
6
7         <script>
8             window.watsonAssistantChatOptions = {
9                 integrationID: "1808a023-4b72-40eb-a7e6-72f355d12e2e", // The ID of this integration.
10                region: "aws-us-east-1", // The region your integration is hosted in.
11                serviceInstanceId: "20240901-1451-5614-70e1-a6b2e36e10be", // The ID of your service instance.
12                onLoad: async (instance) => { await instance.render(); }
13            };
14            setTimeout(function(){
15                const t=document.createElement('script');
16                t.src="https://web-chat.global.assistant.watson.appdomain.cloud/versions/" + (window.watsonAssistantChatOpt
17                document.head.appendChild(t);
18            });
19        </script>
20        <!-- Tela de Login -->
21        <div id="login-section" class="login-section text-center p-5">
22            <form id="login-form" class="w-25 mx-auto">
23                <h1>Login</h1>
24                <div class="mb-3">
25                    <label for="username" class="form-label">Username</label>
```

154. The wizard will be available on your html page.

Marital Status

CNPJ/CPF

Licence Drive

Age

Sex

Commercial Use

[Reset](#) [Save](#)

Address	City	State	Zip Code	Marital Status	CPF/CNPJ	Licence Drive

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

[Return to assistant →](#)

Type something... 

Powered by IBM watsonx ⓘ

Thank you for completing this lab