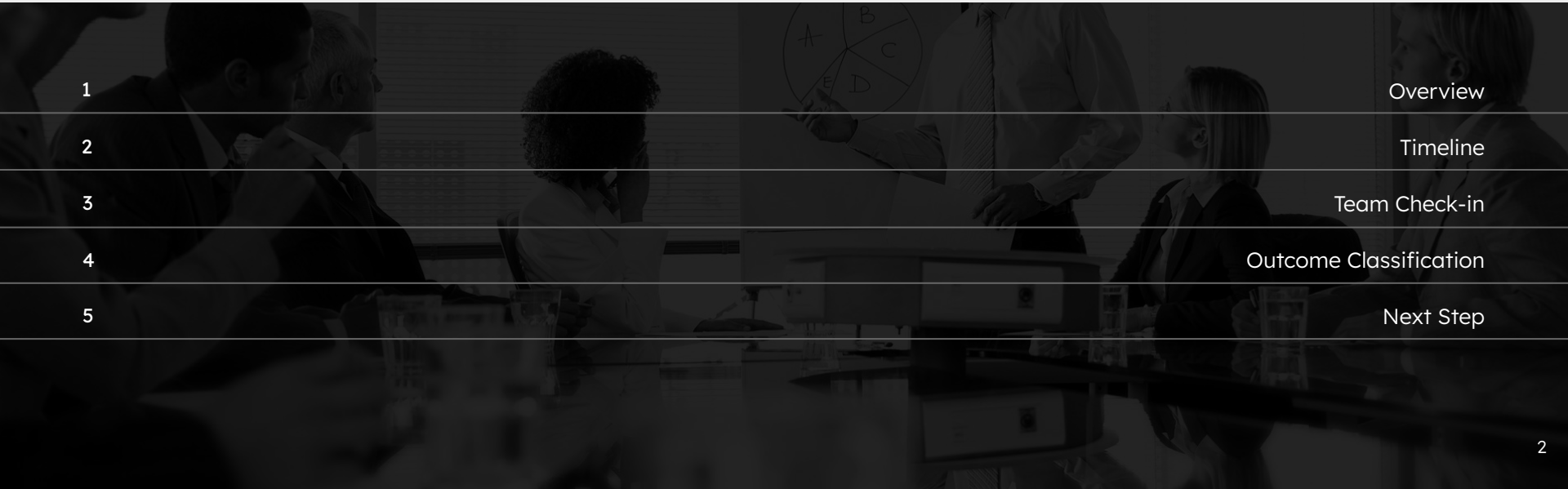
IBM x Columbia Weekly Meeting

IBM x Columbia Core Team

10/30/2025

AGENDA

Why we're here today



1	Overview
2	Timeline
3	Team Check-in
4	Outcome Classification
5	Next Step

Overview

This weekly meeting will be focusing on establishing a clear roadmap and reviewing initial progress for the IBM x Columbia project. Including the timeline, team check-in, and some Q&A at the end.

Timeline

A	B	C	D	E	F	G	H	I	J	K	L	M
Phase	Start Week	End Week	W1 09/23-09/29	W2 09/30-10/06	W3 10/07-10/13	W4 10/14-10/20	W5 10/21-10/27	W6 10/28-11/03	W7 11/04-11/10	W8 11/11-11/17	W9 11/18-11/24	W10 11/25-12/01
Initiation & Planning	1	2										
Objective Clarification												
Literature Review												
Timeline & scope												
Data Exploration & Requirements	3	5										
Data Collecting & Preprocessing												
Data Cleaning & Structuring												
RAG Pipeline Prototyping												
Prototype Development (POC)	3	7										
MCP Workflow Diagrams												
Wireframes												
Mockups												
Prototype Implementation												
Full Solution Development & Testing	8	9										
Performance Test												
Usability feedback												
Final Presentation & Reporting	9	10										
Project Powerpoint												
Project Report												
Demo Presentation												

Team Check-in

1. Data & Knowledge Engineering Team
2. Generative AI & Model Development Team
3. User Experience & Application Development Team
4. Evaluation & Compliance Team

Data & Knowledge Engineering Team

Complete data cleaning for all four phases ✅
Switch embedding model ✅

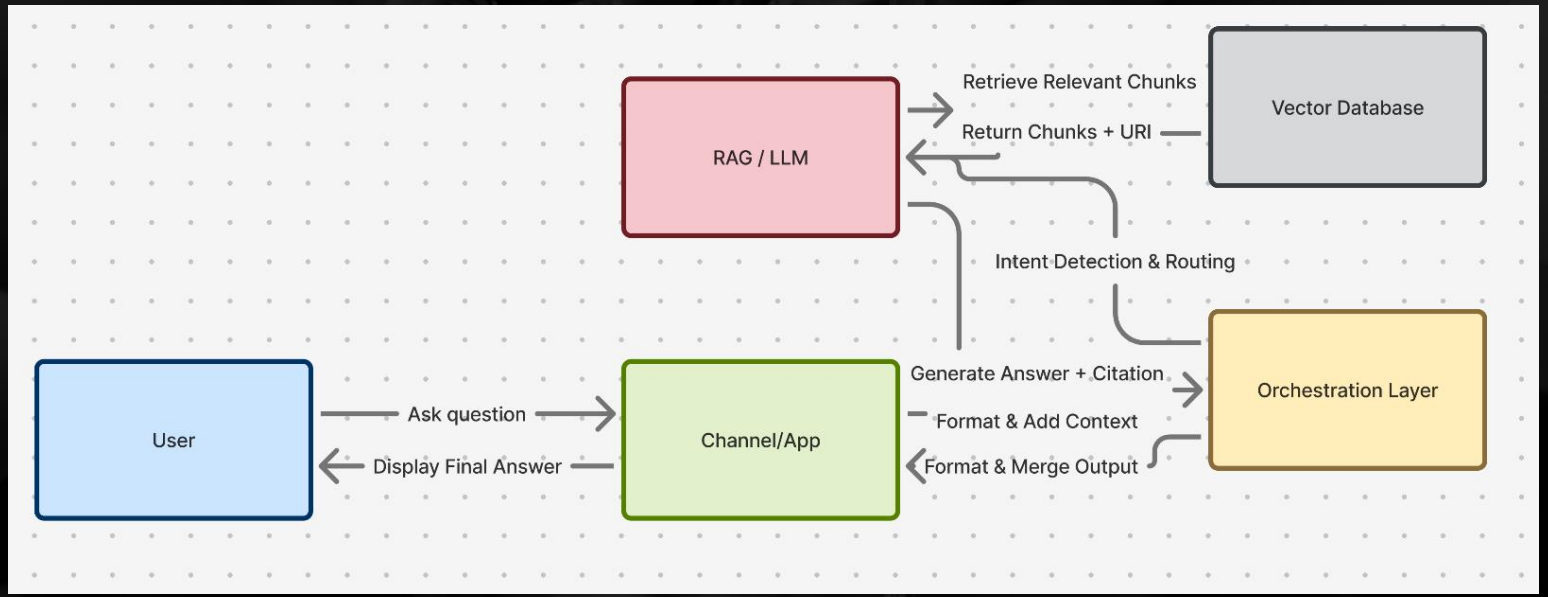
Word/PDF Templates
↓
Text Extraction + Cleaning (done)
↓
Standardized JSON (done)
↓
Chunk & Flatten (done)
↓
Embedding Model (Hugging Face)
↓
Vector Database (Chroma / FAISS / Pinecone)
↓
RAG Retrieval (GenAI Team)

Data & Knowledge Engineering Team

Feature	FAISS	Pinecone	Chroma
Type	Local Library	Cloud-managed DB	Local server
Speed	Fastest	Fast	Good for small data
Best for	Research	Production RAG systems	Small/mid local projects

GenAI & Model Development

IBM User Swimlane



GenAI & Model Development

Core Functionalities:

Q&A

1. User asks a question about any EPLC phase or document (e.g., “What are the deliverables in the Development Phase?”

2. System identifies the question type

3. The RAG pipeline searches the vector database for related EPLC sections or templates.

4. The LLM summarizes retrieved chunks into a concise, cited answer.

5. The system sends the answer, along with references or links to the relevant EPLC templates.

EPLC Assistance

Goal: Guide users in writing or checking EPLC documents.

1. Select EPLC Phase / Section and optionally provide a draft.

2. Fetch key requirements and checklist items from the EPLC database (vectorized data).

3. Evaluate completeness, structure, and compliance with EPLC standards.

4. Provide short examples or improvement tips with citations to the source documents.

User Experience & Application Development Team

10/23 Feedback

1. Confirm the Front-end platform —>Streamlit
2. Confirm all the features shows in wireframe is feasible —> See the GenAI's core functionality part
3. Can add the stepper —> Identified as technically complex; replaced with a "How to Use" page for clearer user guidance.

11/6 Progress

1. Confirmed with the team and finalized the decision —>Streamlit (accessibility and builtin python integration)
2. Most core features are feasible —>Now front-end web development is fully in progress
3. Added "How to Use" page

EPLC Assistant

Empowering IT Project Managers with smarter, faster documentation.

Managing EPLC documents can be complex and time-consuming. EPLC Assistant helps automate this process — using generative AI to create, review, and refine key deliverables such as SLA/MOU, Training Plans, and O&M Manuals. Designed for government and enterprise projects, it combines IBM's trusted AI technology with a human-centered UX to ensure accuracy, compliance, and efficiency.

Start a Project

How to Use EPLC Assistant

Learn how to interact with your AI assistant to generate and understand EPLC materials effectively.

Try the Chatbot →

Step 1 — Ask Your Question

Type your EPLC-related question about an executive order in the input box.

Step 2 — Get Responses

The chatbot searches policy libraries and provides accurate, summarized answers.

Step 3 — Review and Save

Edit or export the response for your project.

Try Asking...

What is the EPLC Initial Phase?

Show me a CDC UP template for planning.

Explain the difference between initiation and planning phases.

💡 Tips for Best Results

- Be specific — mention the EPLC phase or document type you're referring to.
- Try rephrasing your question if the chatbot doesn't understand.
- You can always find official templates and policies linked below.

Project

New Project

Name your project

start

Project

New Project

IBM Watsonx

<uploaded document>

Training Plan

(O&M) Manual

Service Level Agreement / MOU

Test Case

Export all

IBM Watsonx

Training Plan

20%

Training Plan

20%

Training Plan

20%

Training Plan

20%

Let me know more about your project!

+

Project

New Project

IBM Watsonx

<uploaded document>

Training Plan

(O&M) Manual

Service Level Agreement / MOU

Test Case

Export all

IBM Watsonx > Training Plan

Session	Status
Session 2 Test Case Specification	×
2.1 Description	×

Preview Download

2.1 Description

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Accept Edit Regenerate

\+

Describe the test case and the individuals involved in the testing. Include diagrams depicting the interaction between individuals and the different elements being tested.

Project

New Project

IBM Watsonx

<uploaded document>

Training Plan

(O&M) Manual

Service Level Agreement / MOU

Test Case

Export all

IBM Watsonx > Training Plan

Preview

CDC

<PROJECT NAME>

TEST PLAN

Version *<1.0>*

<mm/dd/yyyy>

Project

New Project

IBM Watsonx

<uploaded document>

Training Plan

(O&M) Manual

Service Level Agreement / MOU

Test Case

Export all

IBM Watsonx > Training Plan

Session	Status
Session 3 service level agreement/ MOU	×
3.1 Introduction	×
3.1.1 Purpose of Service legal agrreement/Memoradum	
3.1.2 Scope	
3.1.3 Background	
3.1.4 Audience	
3.1.5 Assumptions	
3.1.6 Roles and Responsibilities	
3.1.7 Contacts	
3.2 Service Details	
3.2.1 Requirements	
3.2.2 Service Level Expectations	
3.2.3 Escalation Actions	
3.2.4 Service Provider/ Services Recipient	
3.2.5 Service Hours for Problem Solution	
3.2.6 Performance Guarantee	
3.2.7 Agreement Change Process	

Preview Download

3.1 introduction

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Accept Edit Regenerate

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Describe the test case and the individuals involved in the testing. Include diagrams depicting the interaction between individuals and the different elements being tested.

User Experience & Application Development Team

Now in progress:

1. Front-end Development(ddl:next Monday deliver MVP website to the data team, prepare for algorithm integration with the genAI team)
2. Finalize design (ddl:next Monday, keep improving the core features and user feedback within the team)
   a. Completed the detailed step-by-step click through guide so that frontend team can know better the workflow
   b. Added the “introduction” page and the “how to use” page
3. Keep teams updated on feasibility

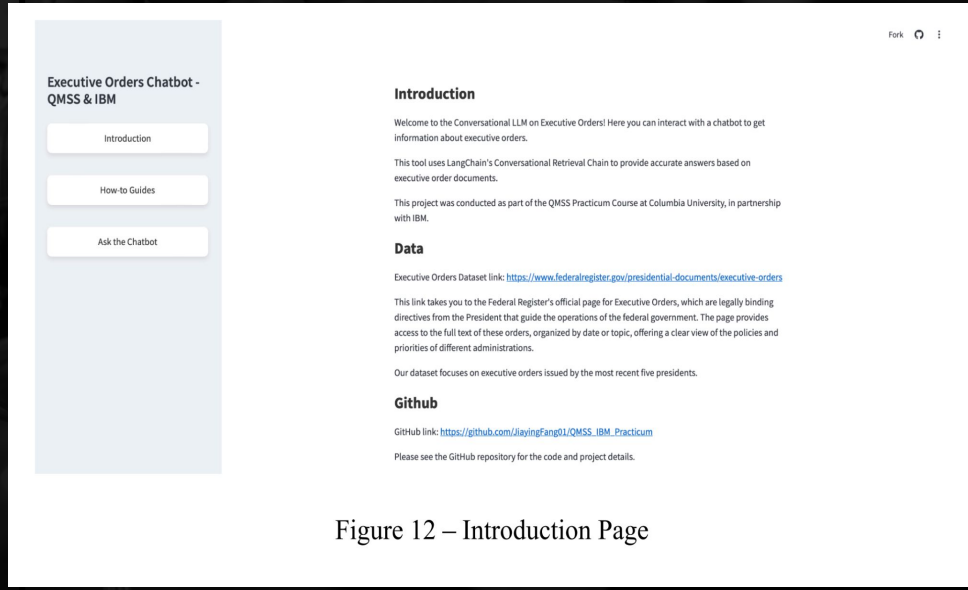

Figure 12 – Introduction Page

Evaluation & Compliance Team

https://docs.google.com/document/d/1BRKGJcGlFmDYa5HiAxOdrogoXzCqA24CLPXS1THT5TI/edit?usp=sharing

We’re still keep refining the survey question lists for the final product.

Questions

NEXT STEPS

Keep up with the timeline, communicate with the sub-team for better support. Diving into the topics we've touched on today to deepen our understanding on the project, and starting the data preparation procedure.

THANK YOU!

Columbia Practicum Core Team