

Oracle Banking Digital Experience

Chatbot Configuration Guide
Release 18.1.0.0.0

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ORACLE®

Chatbot Configuration Guide

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1. Preface

1.1 Intended Audience

This document is intended for the following audience:

- Customers
- Partners

1.2 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=accandid=docacc>.

1.3 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=accandid=info> or visit

<http://www.oracle.com/pls/topic/lookup?ctx=accandid=trs> if you are hearing impaired.

1.4 Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual.

The subsequent chapters describes following details:

- Purpose
- Configuration / Installation.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 18.1.0.0.0, refer to the following documents:

- Oracle Banking Digital Experience Licensing Guide

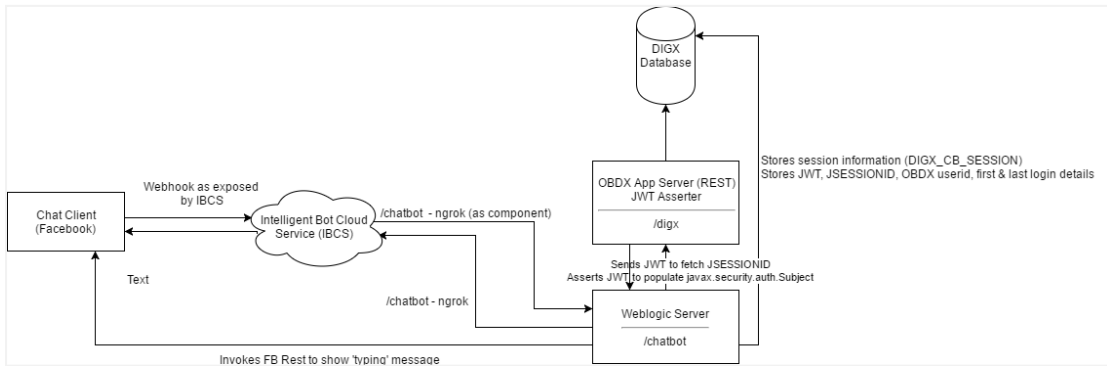
2. Purpose

OBDX 18.1 provides interface for Chatbot module, integrated with IBCS out of the box. It provides end users a chat interface to interact with the bank. Transactions like balance enquiry, bill payments, fund transfers to payees, enquiring about banking products and details of ATM/Branches can be achieved through chat. This document provides steps to setup OBDX chatbot module with IBCS. The prerequisites include –

- IBCS setup (Refer to OBDX pre-requisite document for version)
- Facebook credentials to create a Facebook page

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3. Topology

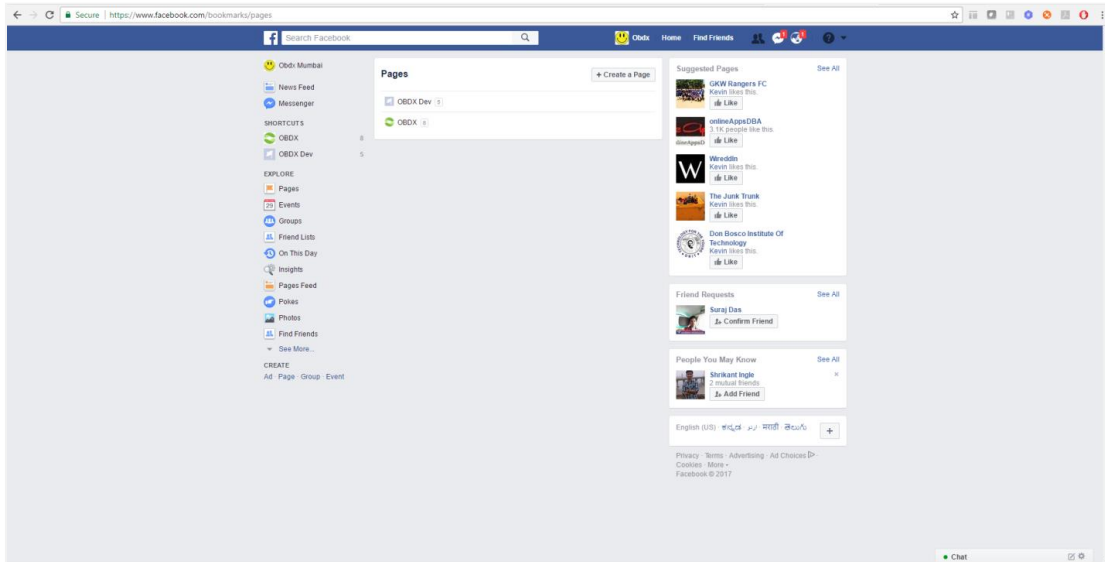


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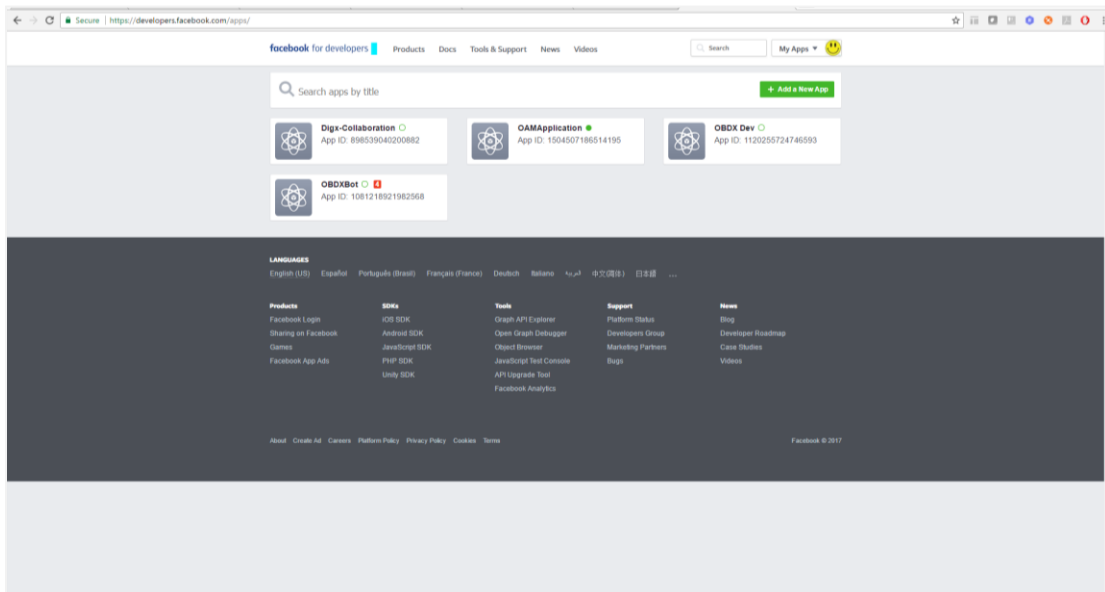
4. Facebook Configurations

Create a Facebook account for the Bank

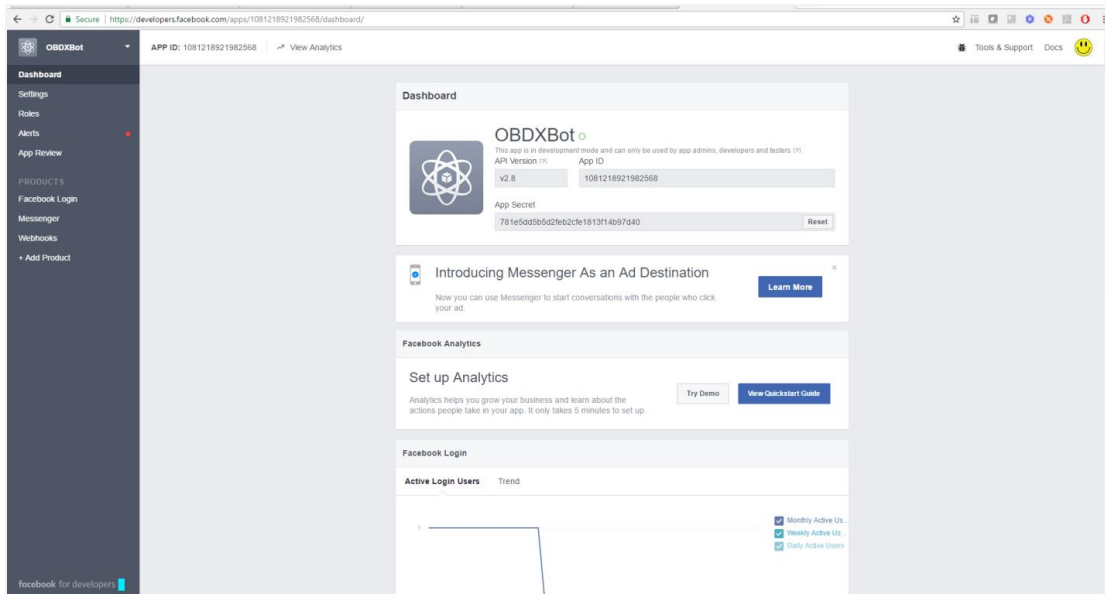
1. Login to Facebook with this credentials.
2. Create a new page



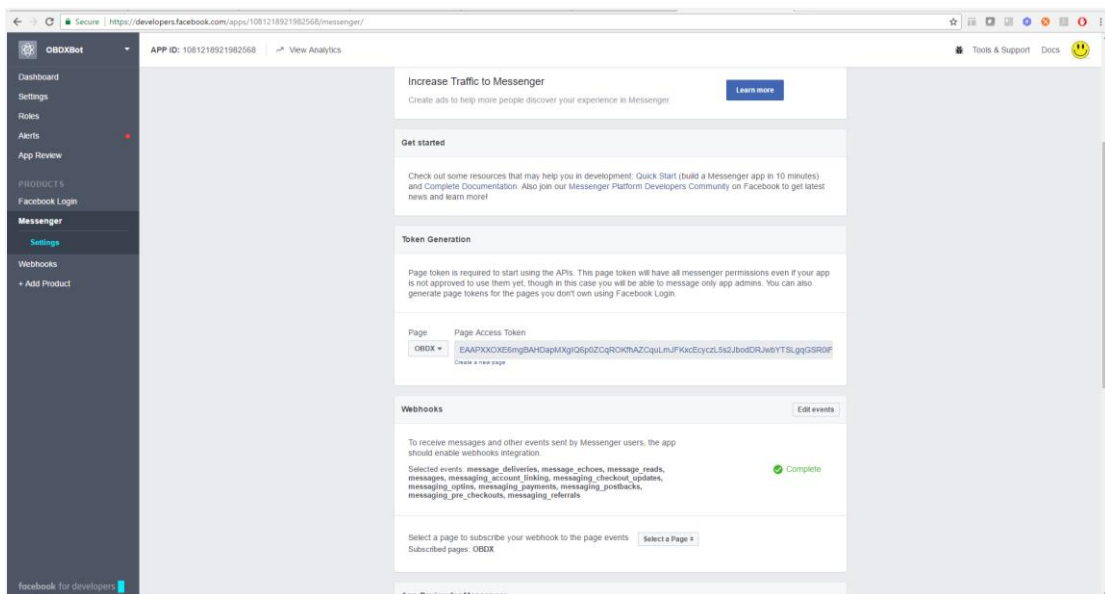
3. Navigate to developer link and create an application as shown below



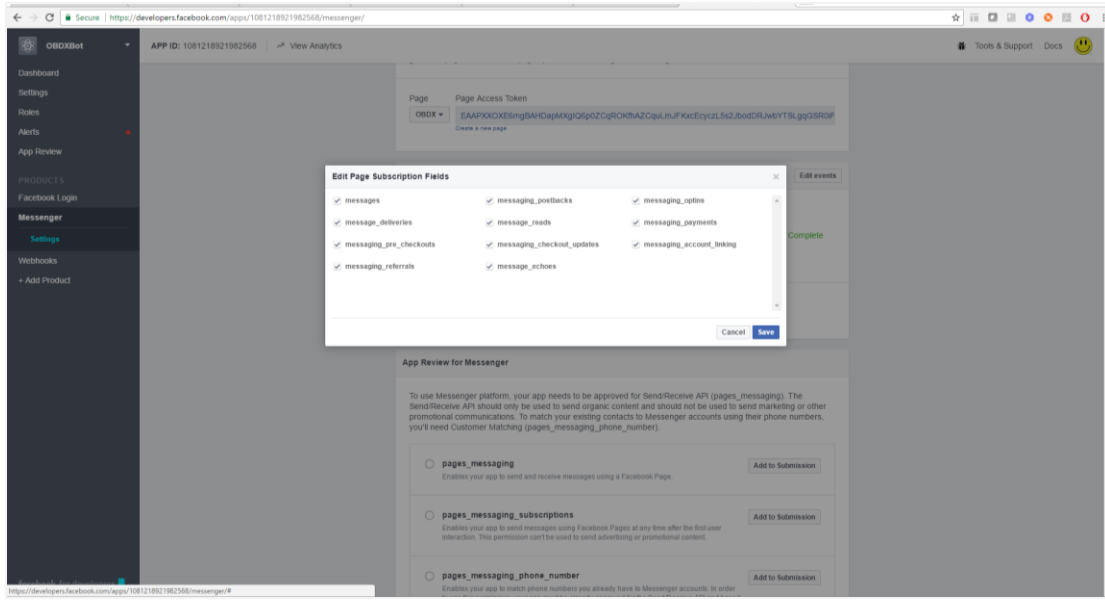
4. Navigate to dashboard page and note the app secret



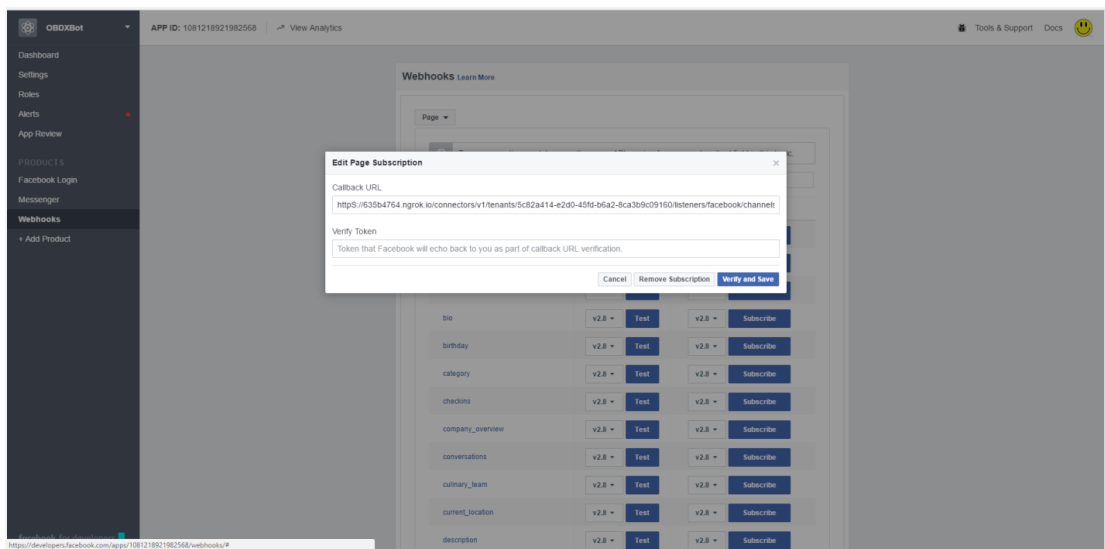
- Navigate to Messenger > Settings page from left panel and in token generation section select the page created previously. Note the page access token.



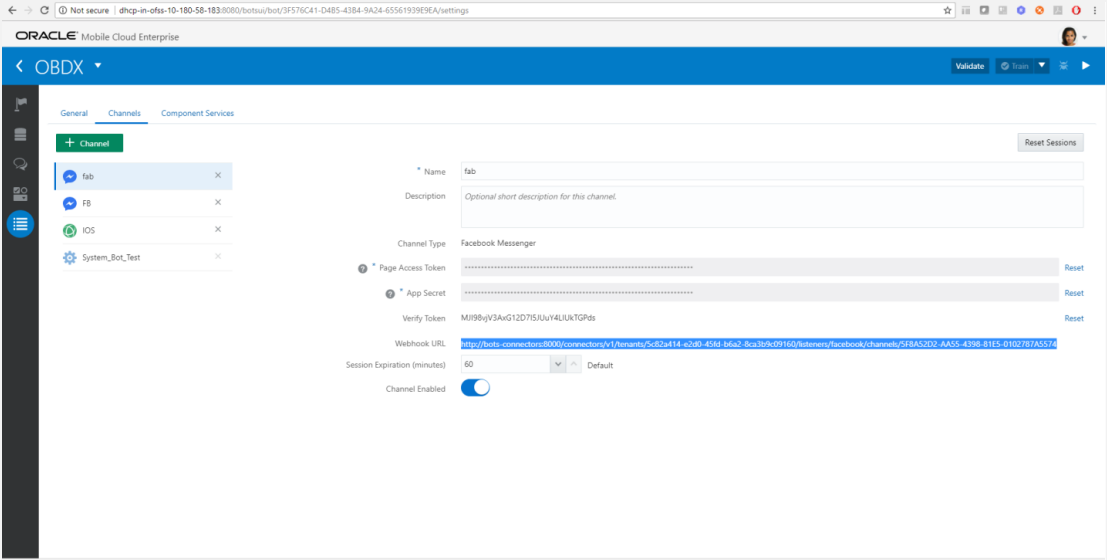
- In the webhook section select the events



7. Navigate to Webhook > Edit Subscription

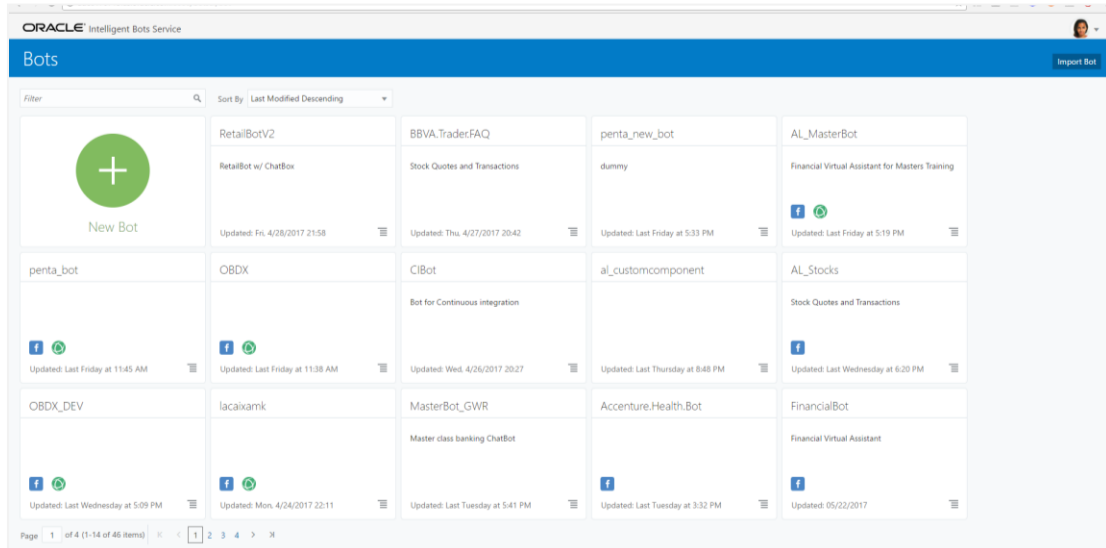


8. Add the IBCS URL here. IBCS URL should be available on the internet for Facebook to get access. One can configure ngrok to IBCS and get the tenant URL for the same. This URL is obtained from below screen in IBCS. The verify token is also obtained here.

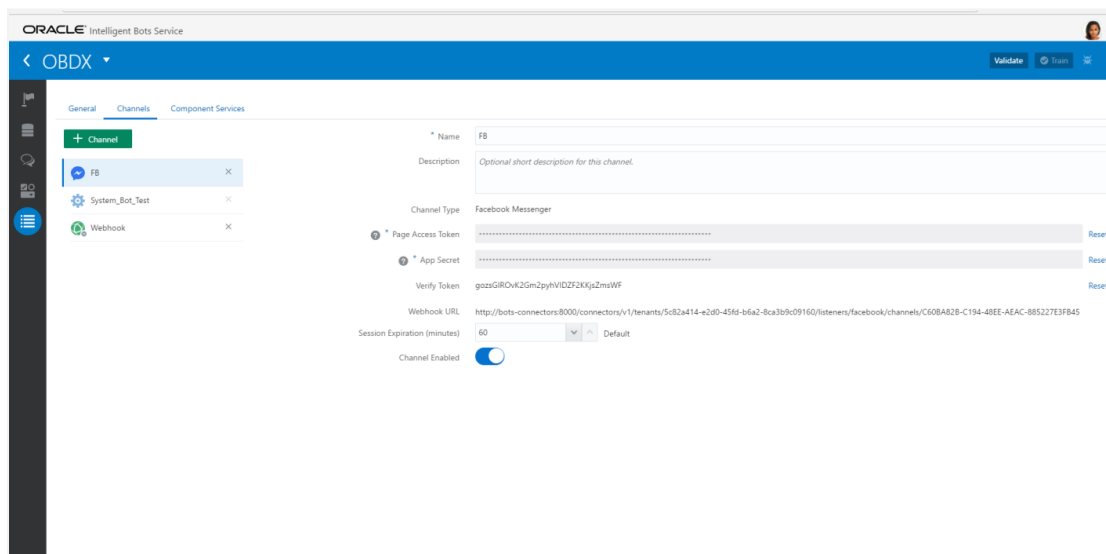


4.2 IBCS Configurations

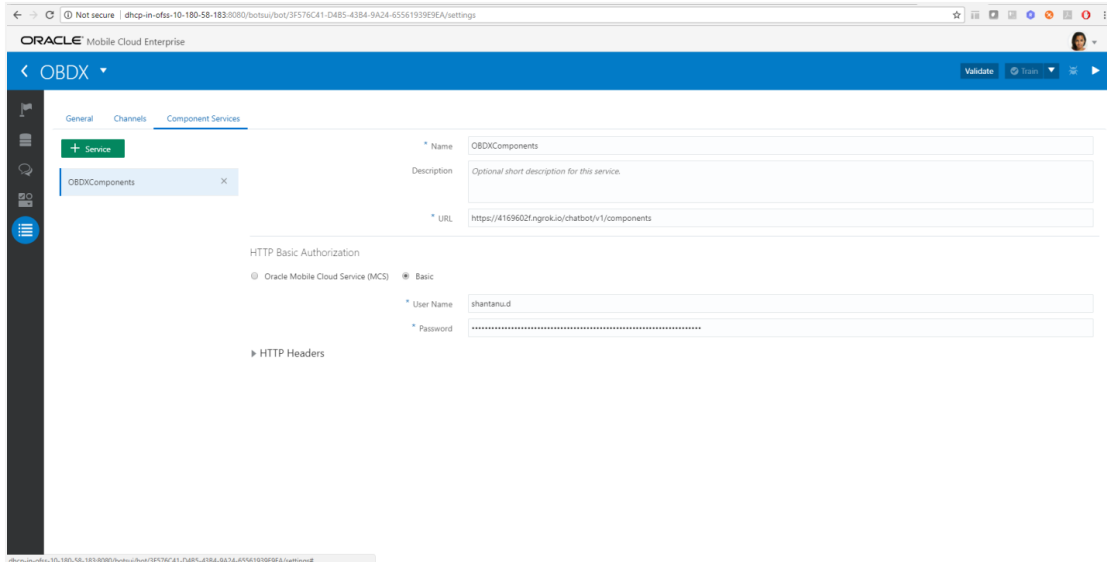
1. Login to IBCS and import the OBDX bot shipped with OBDX installer. This is a json (OBDX.json) file obtained in the installer in OBDX_Installer/installables/chatbot/config directory. Import this by clicking the “Import Bot” on IBCS dashboard.



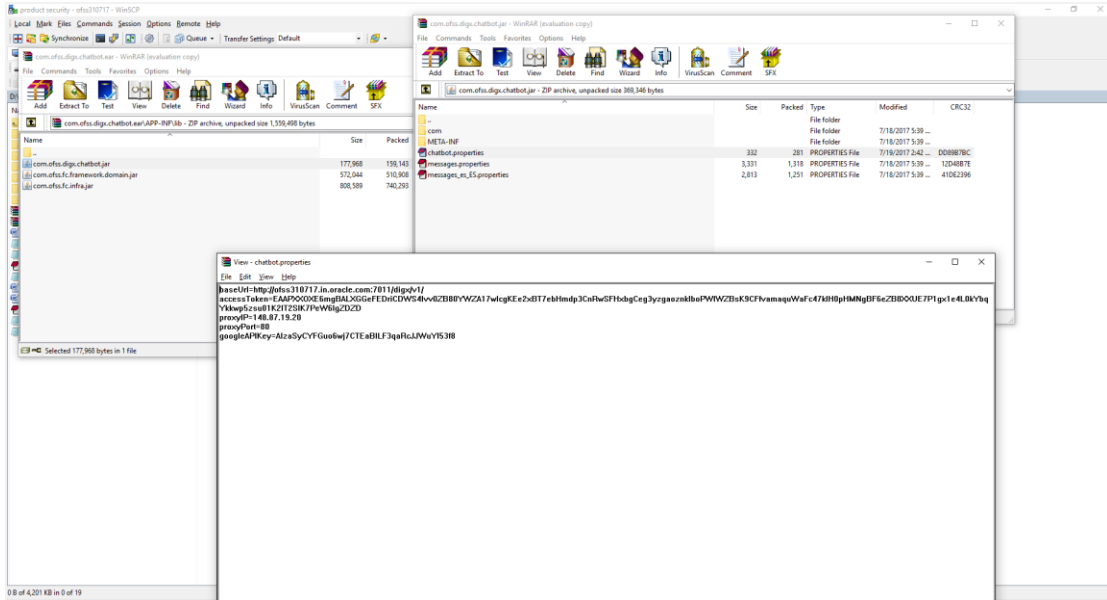
2. Click on the OBDX Bot



3. Update the Page access token and App Secret created previously in Facebook console.
4. Navigate to Webhook and enter the OBDX URL here. The OBDX setup and the IBCS setup must be accessible either in the same LAN, else host OBDX on internet using ngrok.



5. Add username/password (in HTTP Basic authorization) of any user with Administrator role which can be used to login in OBDX Weblogic server.



Redeploy the ear after above changes.

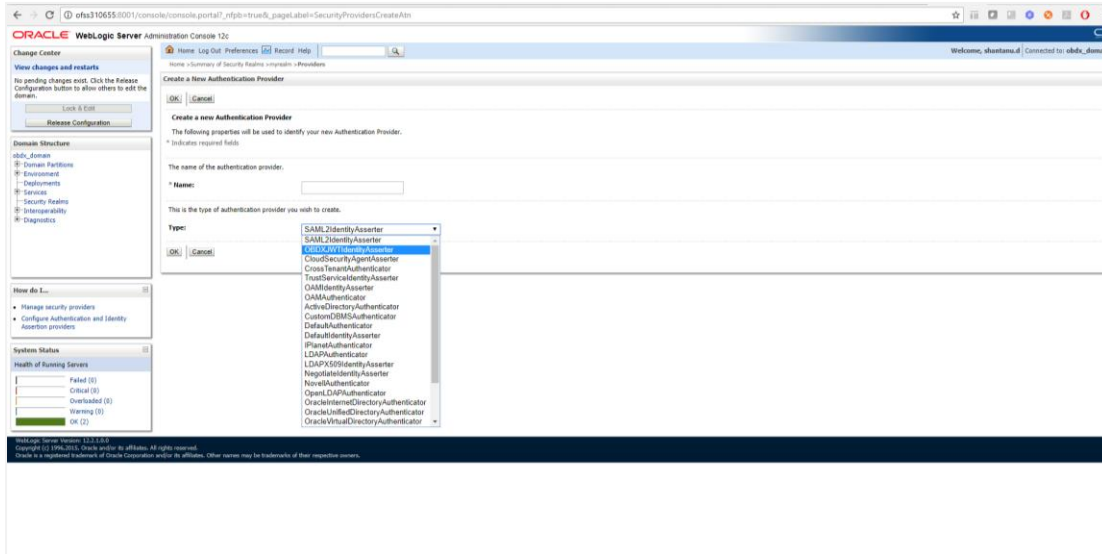
Asserter is required so that OBDX can assert the identity of the user who has a valid token. This token is issued by OBDX once mobile number and OTP validation is successful. Asserter jar is available in the installer in OBDX_Installer/installables/custom_asserter Custom Asserter directory.

- Add OBDXJWTAsserter to Weblogic

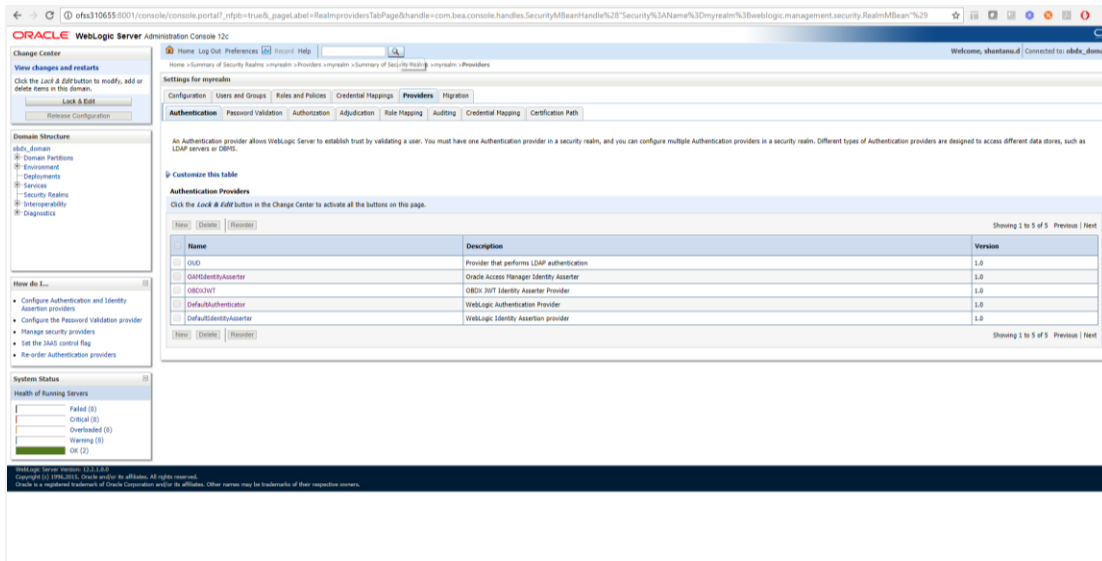
Copy the OBDXJWTAsserter.jar to weblogic home at below location –
 <Weblogic Home>/Middleware/wlserver/server/lib/mbeantypes

Restart Admin/Managed servers

Login to Admin console and add the selected asserter



Add the asserter and give any name. Restart admin and managed servers.



Verification Steps

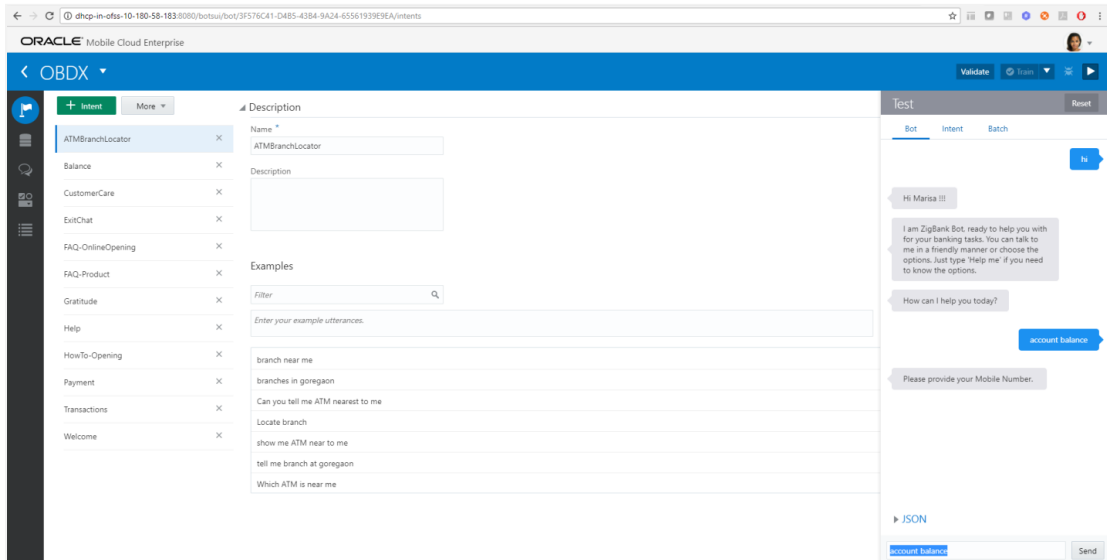
1. Check if OBDX server Chatbot application is running and accessible over the component URL given to IBCS. Open a browser and enter the URL as entered in IBCS component services.

```

{
  {
    "name": "login",
    "properties": {
      "mobileNumber": {
        "type": "string",
        "required": true
      }
    },
    "supportEditions": {
      "success": true,
      "fail": false
    }
  },
  {
    "name": "validateOTP",
    "properties": {
      "otp": {
        "type": "string",
        "required": true
      },
      "mobileNumber": {
        "type": "string",
        "required": true
      },
      "tokenExp": {
        "type": "string",
        "required": true
      },
      "otpAttempts": {
        "type": "int",
        "required": true
      }
    },
    "supportEditions": {
      "success": true,
      "fail": false
    }
  },
  {
    "name": "quickBalance",
    "properties": {
      "accountNumber": {
        "type": "string",
        "required": true
      }
    },
    "supportEditions": []
  },
  {
    "name": "checklogin",
    "properties": {
      "mobileNumber": {
        "type": "string",
        "required": true
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    },
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    "name": "fetchAccounts",
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        "required": true
      }
    },
    "supportEditions": []
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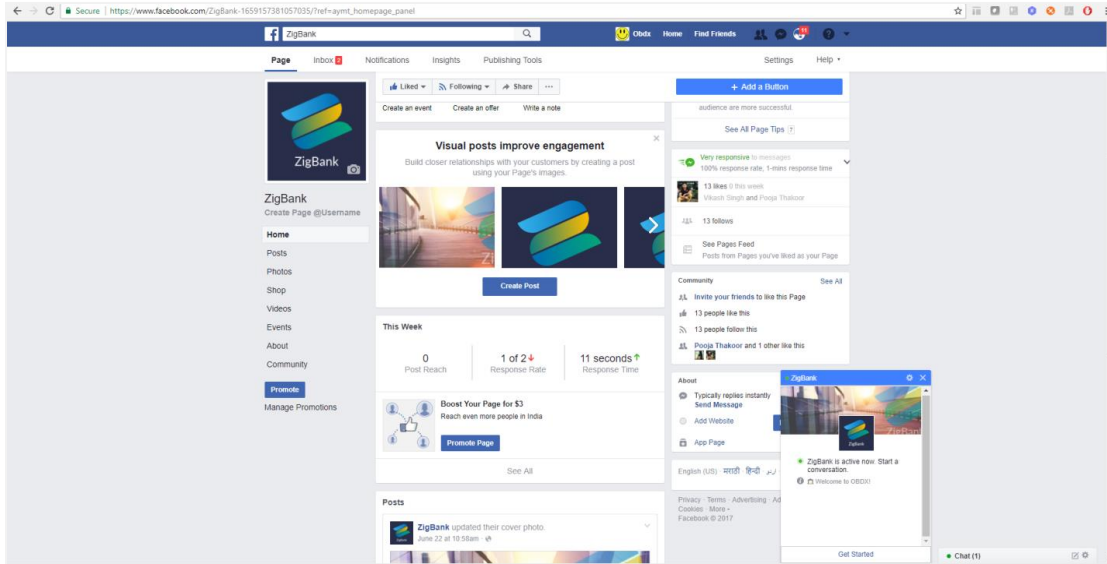
```

2. Login to IBCS and click OBDXBot > Test

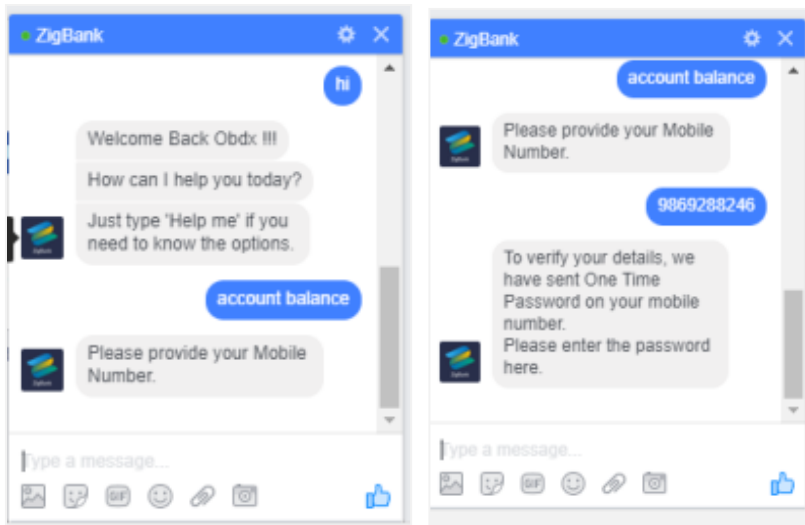


Enquire about account balance

1. Login to Facebook > Navigate to the page and click > Send message



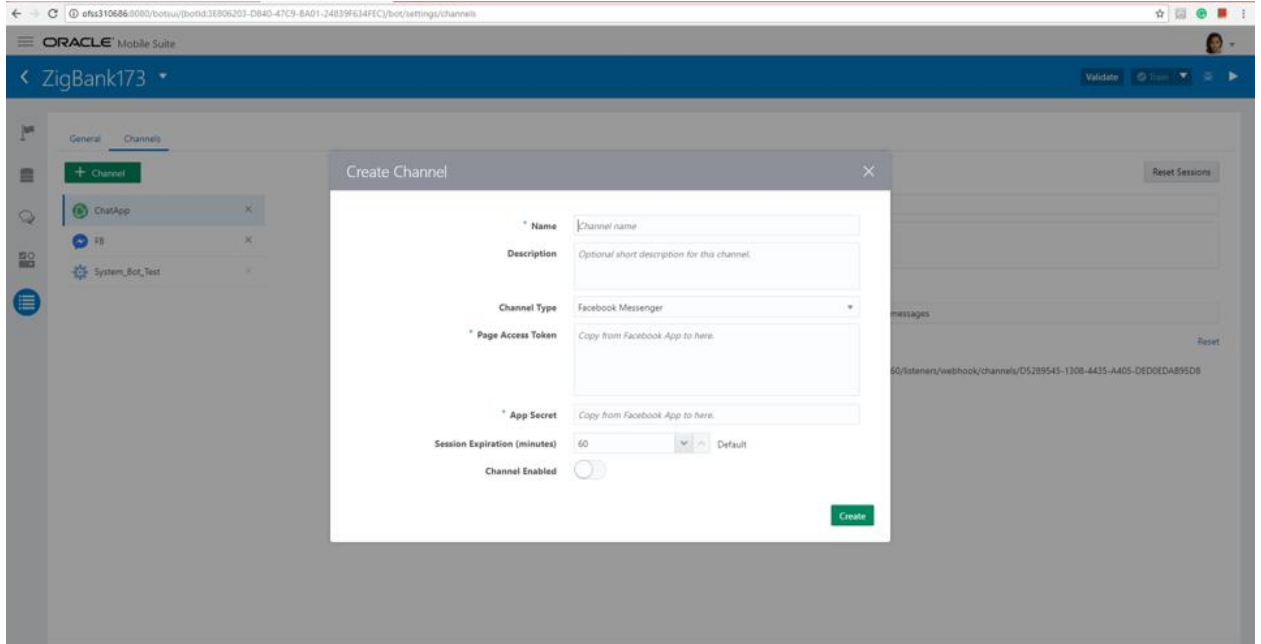
2. Click Get Started in the chat window > You should receive welcome message from IBCS
3. Enquire about account balance > OTP should be received on given mail ID in party creation in core banking.



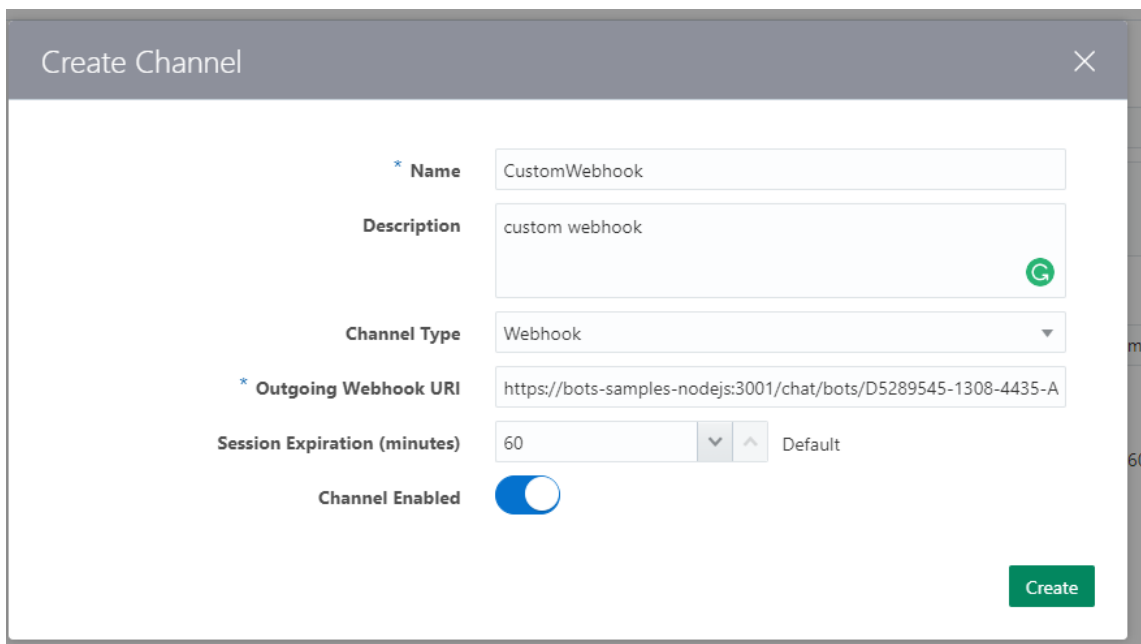
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5. Custom Webhook Configuration in IBCS

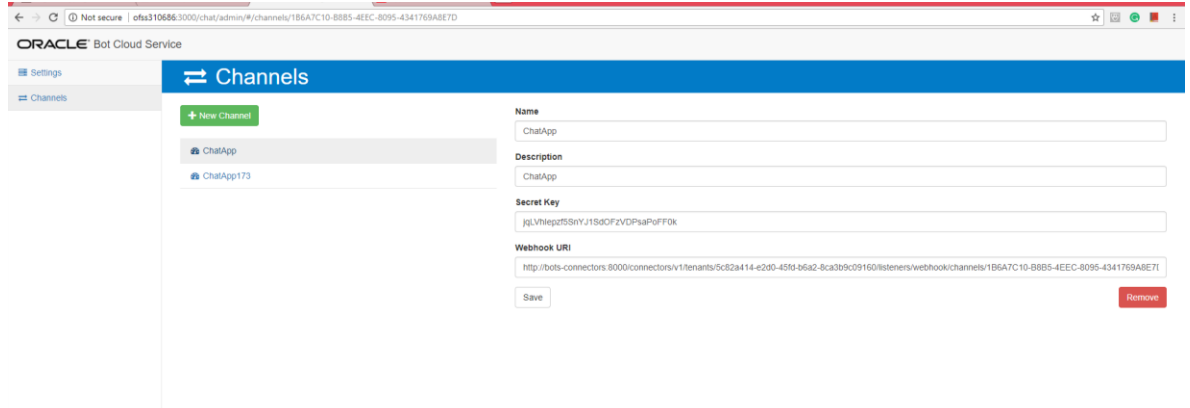
1. In order to set up a channel apart from facebook, you need to add a custom webhook
2. Navigate to botsui bot's add webhook form



3. Fill form with your details in "Outgoing Webhook URI" field put: `https://bots-samples-nodejs:3001/chat/bots/channel_id/messages` and hit create button
4. Replace "channel_id" in "Outgoing Webhook URI" field with last parameter in url from "Webhook URL" field.



- Open 'Admin UI' (e.g <http://ofss310686:3000/chat/admin/>) and create new channel with "Secret Key" and "Webhook URL" from web hook form in botsui.



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