Chatbot Configuration Guide
Oracle Banking Digital Experience
Patchset Release 22.2.1.0.0

Part No. F72987-01

May 2023

ORACLE

Chatbot Configuration Guide

May 2023

Oracle Financial Services Software Limited

Oracle Park

Off Western Express Highway

Goregaon (East)

Mumbai, Maharashtra 400 063

India

Worldwide Inquiries:

Phone: +91 22 6718 3000

Fax:+91 22 6718 3001

www.oracle.com/financialservices/

Copyright © 2006, 2023, Oracle and/or its affiliates. All rights reserved.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Table of Contents

1. Preface 1–1

1.1 Intended Audience 1–1

1.2 Documentation Accessibility 1–1

1.3 Access to Oracle Support 1–1

1.4 Structure 1–1

1.5 Related Information Sources 1–1

2. Purpose 2–1

3. Topology 3–1

4. Common Configurations 4–2

4.1 ODA Configurations 4–2

5. Configuring Channels in ODA 5–5

5.1 Web Channel 5–5

5.2 Android Channel 5–6

5.3 iOS Channel 5–6

5.4 Facebook Channel 5–7

5.5 Alexa Channel 5–1

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=acc&id=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=acc&id=info or visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=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:

- Introduction
- Preferences & Database
- Configuration / Installation.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Patchset Release 22.2.1.0.0, refer to the following documents:

- Oracle Banking Digital Experience Installation Manuals

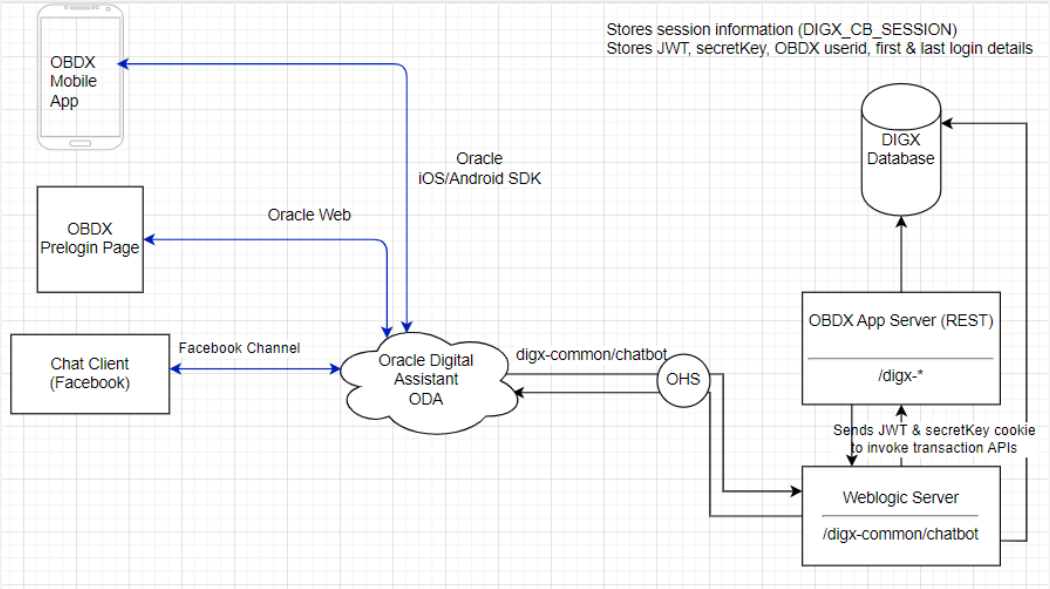
2. Purpose

OBDX provides interface for Chatbot module, integrated with Oracle Digital Assistant (ODA) out of the box. It provides end users a chat interface to interact with the bank. Transactions like balance enquiry, 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 ODA. The prerequisites include:

- ODA setup

Home

3. Topology

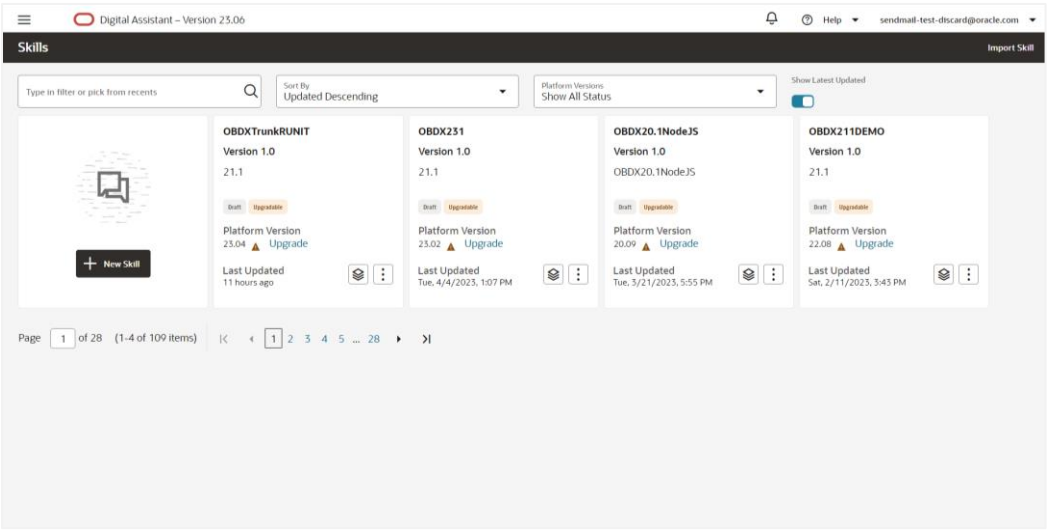


Home

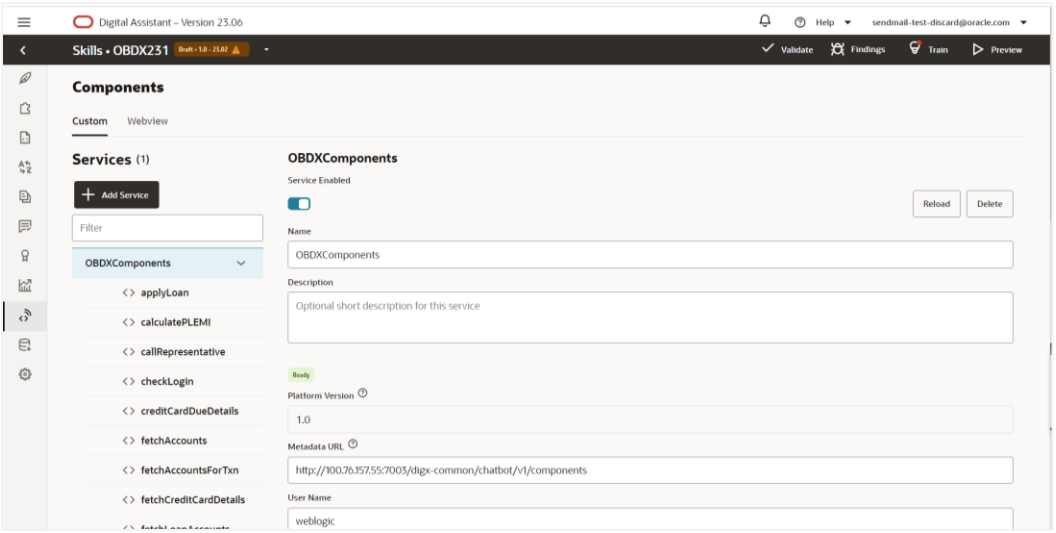
4. Common Configurations

4.1 ODA Configurations

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

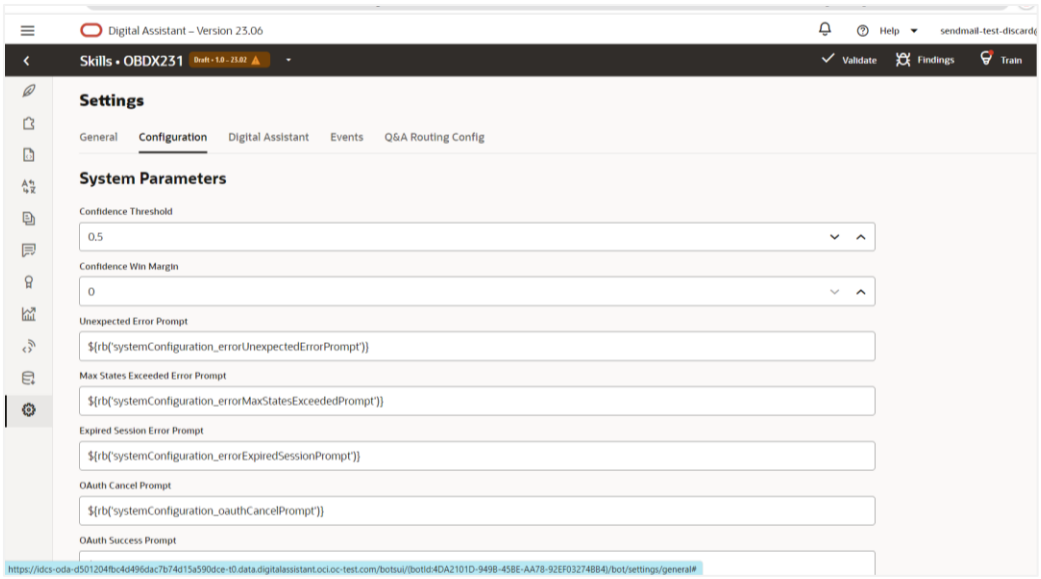


2. Click on the OBDX Bot and click on the components to add the custom components.

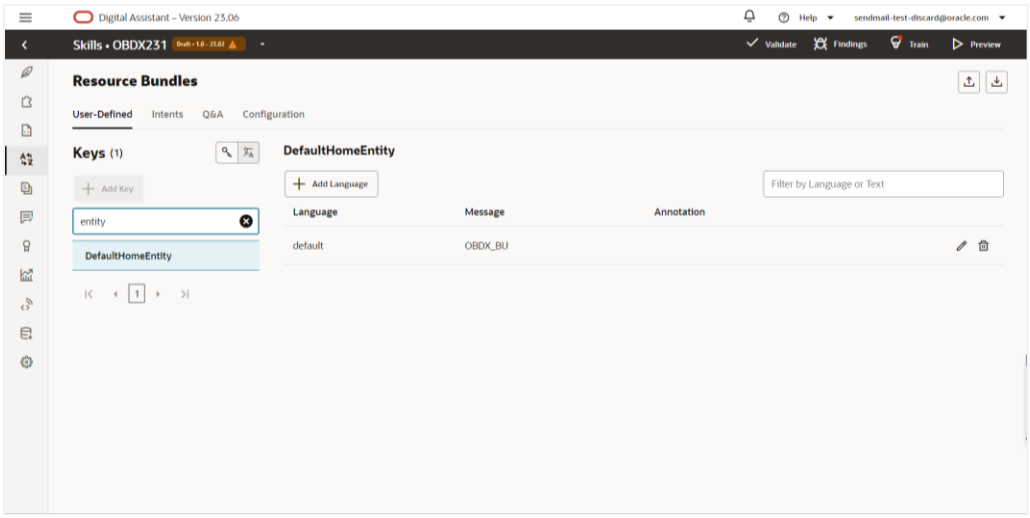


3. Put the OBDX URL here. The OBDX setup and the ODA setup must be accessible over Internet.
4. Add username/password (in HTTP Basic authorization) of any user with Administrators role which can be used to login in OBDX Weblogic server.

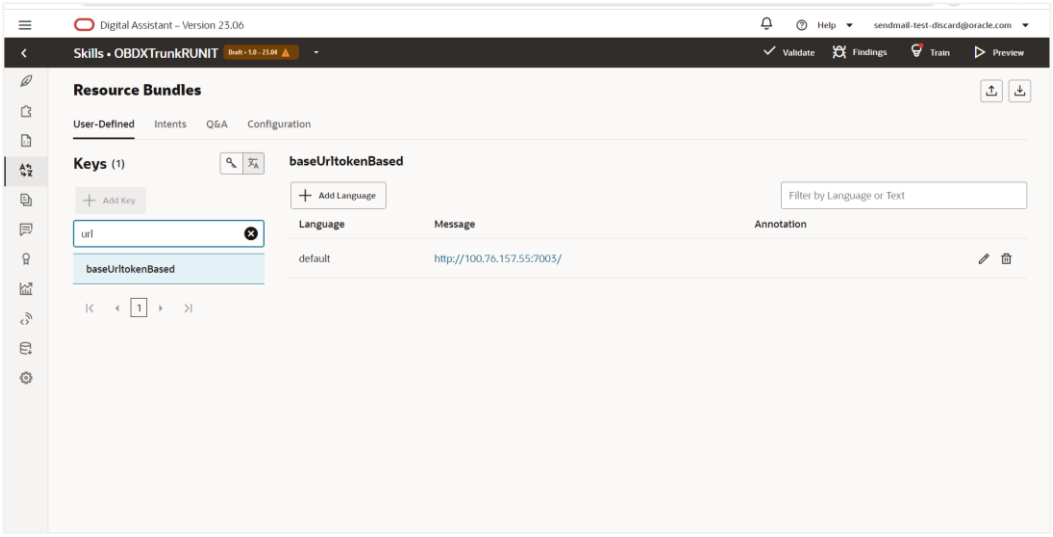
5. In order to configure intent threshold for the skill go to settings tab in a bot and click configurations to configure threshold frequency (default 0.5) as shown below-



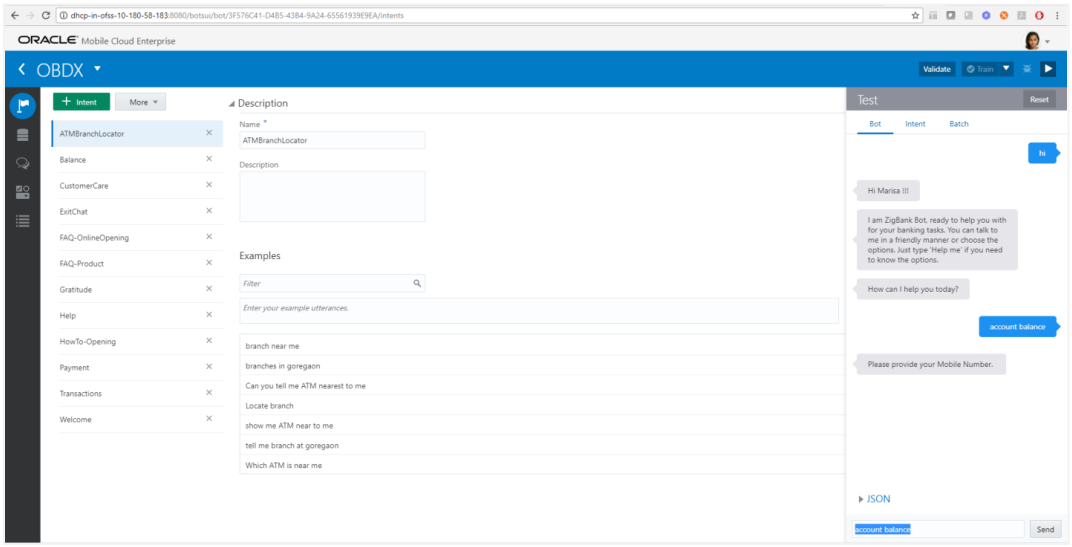
6. Configure required entity in a resource bundles (one created/configured in OBDX). At a time chatbot works with single entity. Go to Resource Bundles as shown below-



7. Configure OBDX managed server url where OBDX rest apis are hosted –



8. Login to ODA and click OBDXBot > Test



Home

5. Configuring Channels in ODA

In addition to Facebook Messenger Channel, OBDX bot can be configured with Oracle Web, Oracle Android and Oracle iOS channels.

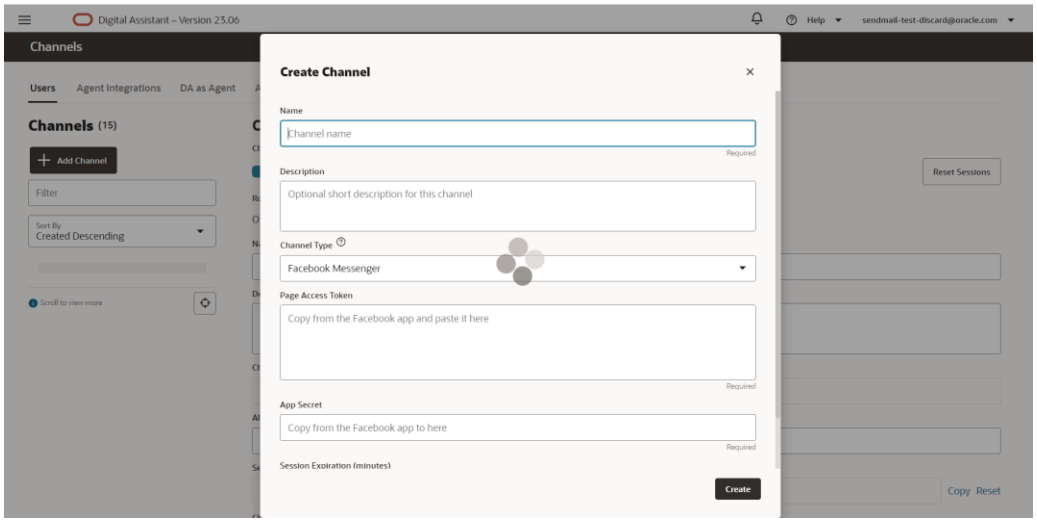
Chatbot widget appears on prelogin page in OBDX UI where the login is with mobile number/(OTP or PIN or Soft Token)

For post login, the browser session is automatically used

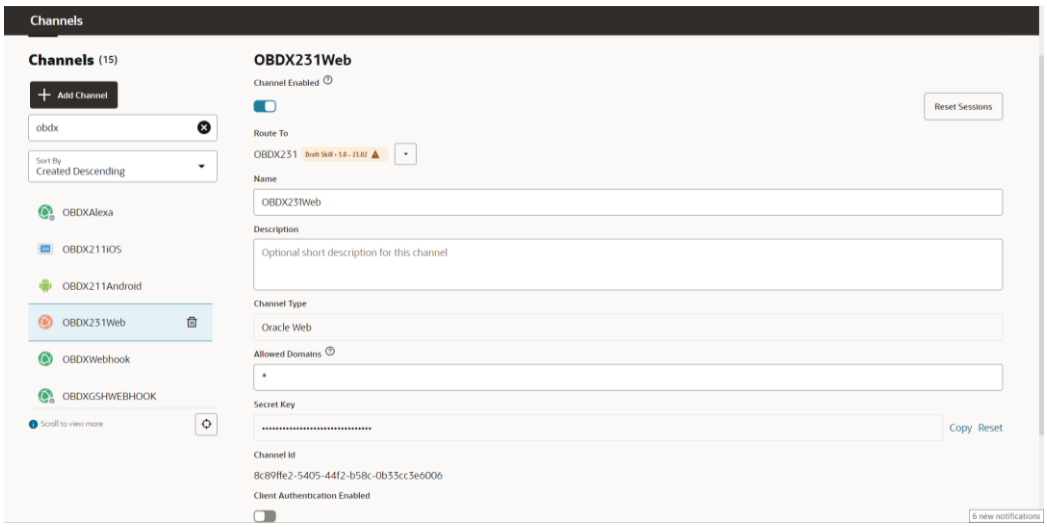
5.1 Web Channel

In order to configure this channel:

1. Choose Development ->Channels-> Users from the menu. Click **Add Channel.**



2. Create Oracle Web as the channel type.



3. Route the channel to your skill or digital assistant.

4. Switch Channel Enabled to On.
5. Add above Chatbot URL and channelId in /ui/framework/js/configurations/config.js in oda tag

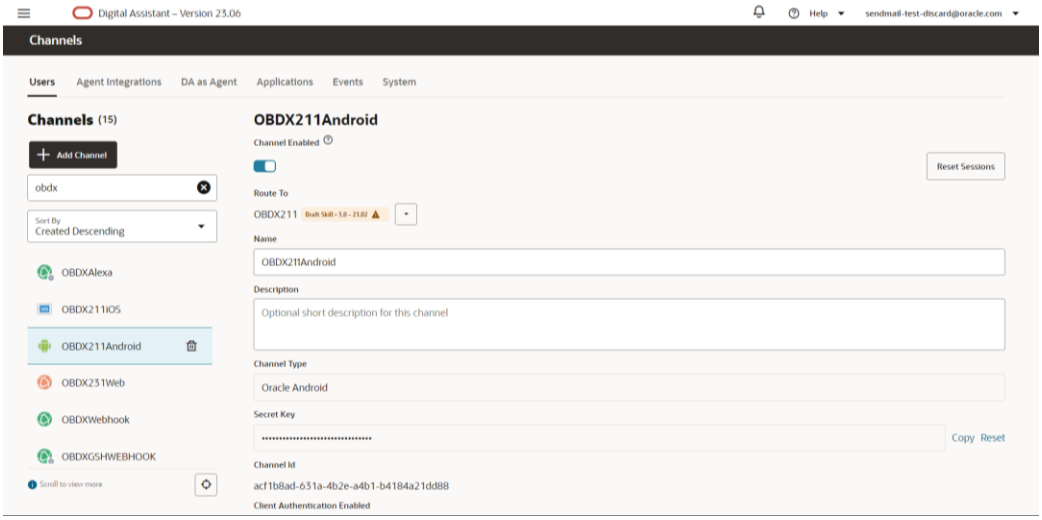
To remove this chatbot widget

- Remove URL & channelId in above file
- Remove the “chat-bot” tag in prelogin dashboard → DIGX_DB_DASHBOARD → DASHBOARDDESIGN blob for anonymous dashboard

5.2 Android Channel

In order to configure this channel:

1. Choose Development->Channels->Users from the menu. Click **Add Channel.**
2. Then add Oracle Android as the channel type.

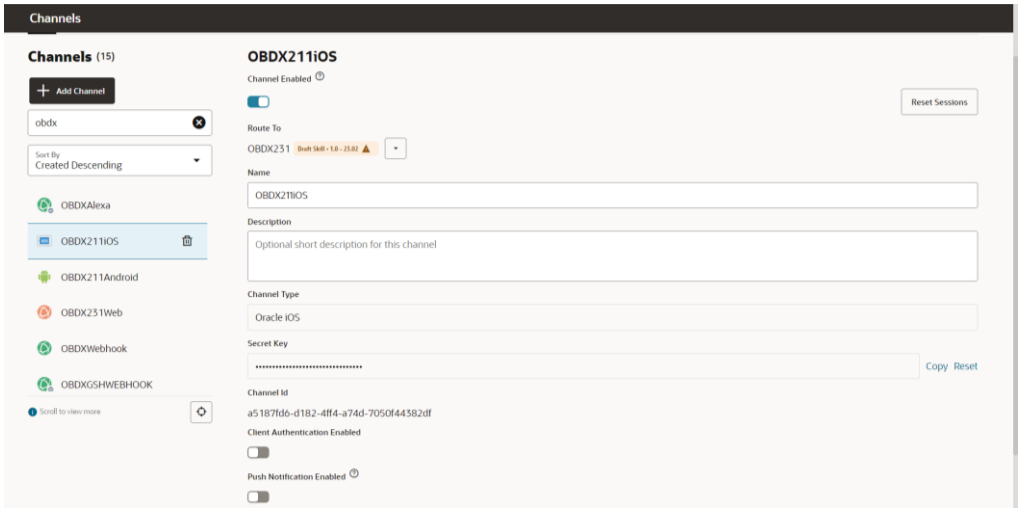


3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.3 iOS Channel

In order to configure this channel:

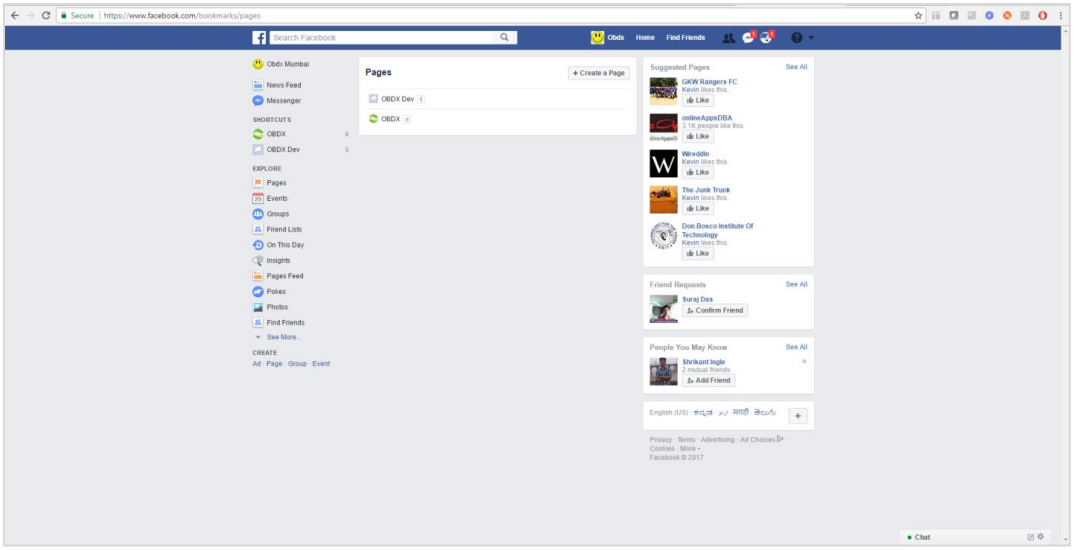
1. Choose Development->Channels->Users from the menu. Click Add Channel.
2. Add Oracle iOS as the channel type.



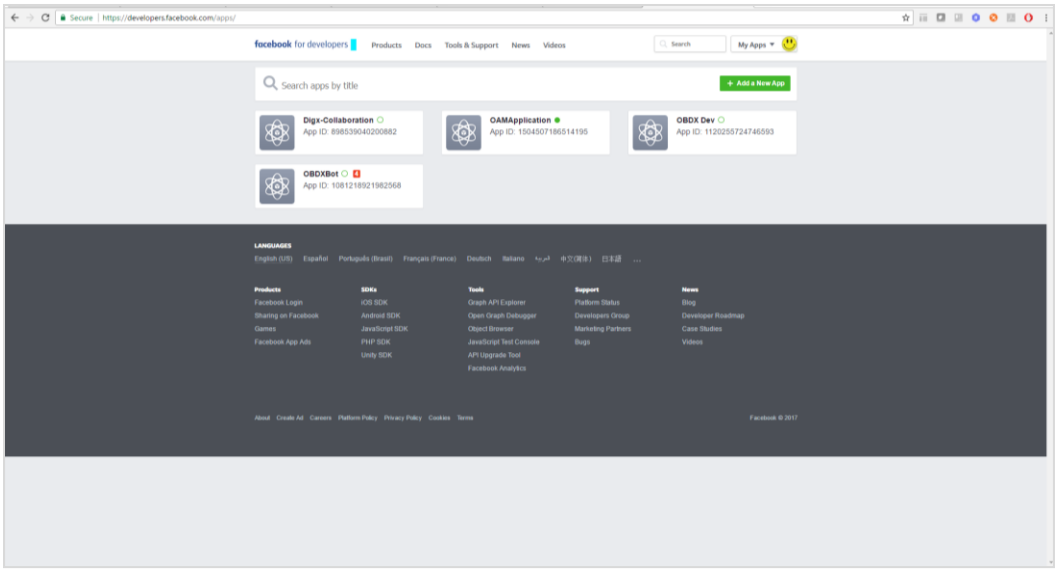
3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.4 Facebook Channel

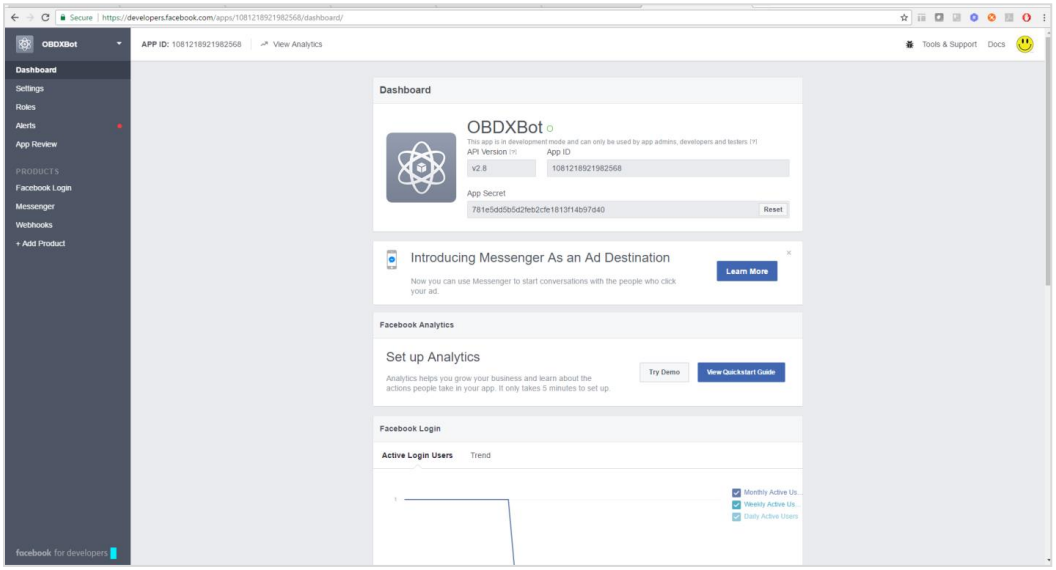
1. Create a Facebook account for the Bank. Login to Facebook with credentials.
2. Create a new page



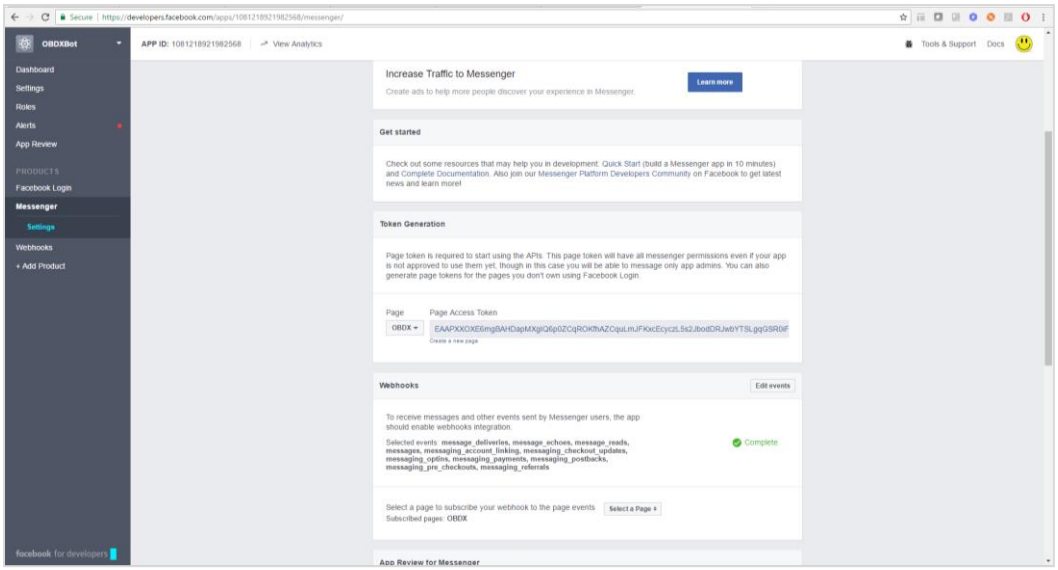
3. Navigate to developer link and create an application as shown below



4. Navigate to dashboard page and note the app secret as it will require in future steps.

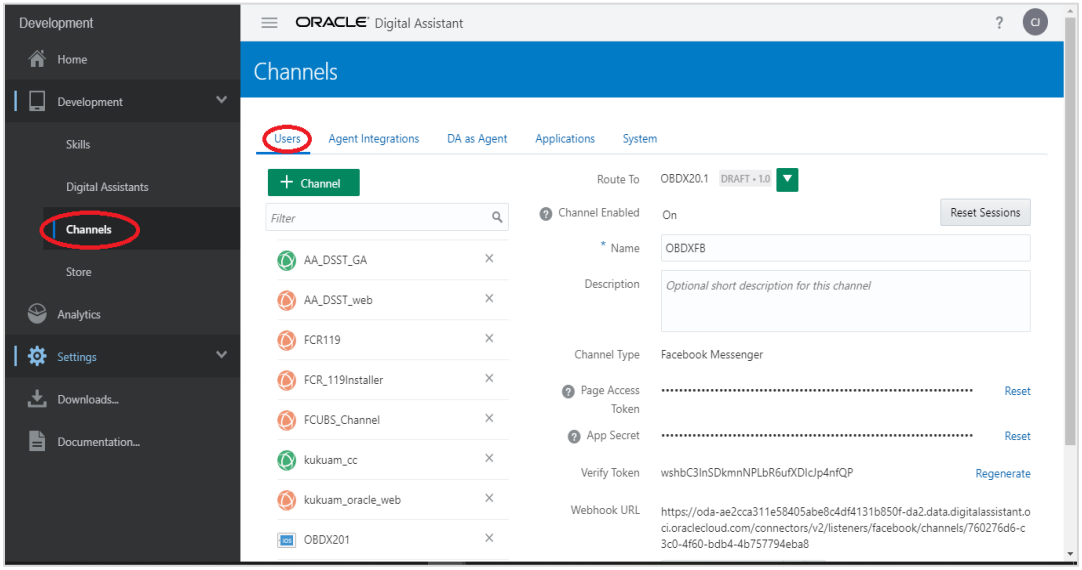


5. Navigate to Messenger > Settings page from left panel and in token generation section select the page created previously. Note the page access token.


OBDXBot
Dashboard
Settings
Roles
Alerts
App Review
PRODUCTS
Facebook Login
Messenger
Settings
Webhooks
+ Add Product
APP ID: 1081218921982568
View Analytics
Tools & Support
Docs
Increase Traffic to Messenger
Create ads to help more people discover your experience in Messenger.
Learn more
Get started
Check out some resources that may help you in development: Quick Start (build a Messenger app in 10 minutes) and Complete Documentation. Also join our Messenger Platform Developers Community on Facebook to get latest news and learn more!
Token Generation
Page token is required to start using the APIs. This page token will have all messenger permissions even if your app is not approved to use them yet, though in this case you will be able to message only app admins. You can also generate page tokens for the pages you don't own using Facebook Login.
Page
Page Access Token
OBDX
Webhooks
Edit events
To receive messages and other events sent by Messenger users, the app should enable webhooks integration.
Complete
Select a page to subscribe your webhook to the page events
Select a Page
Subscribed pages: OBDX
App Review for Messenger
facebook for developers

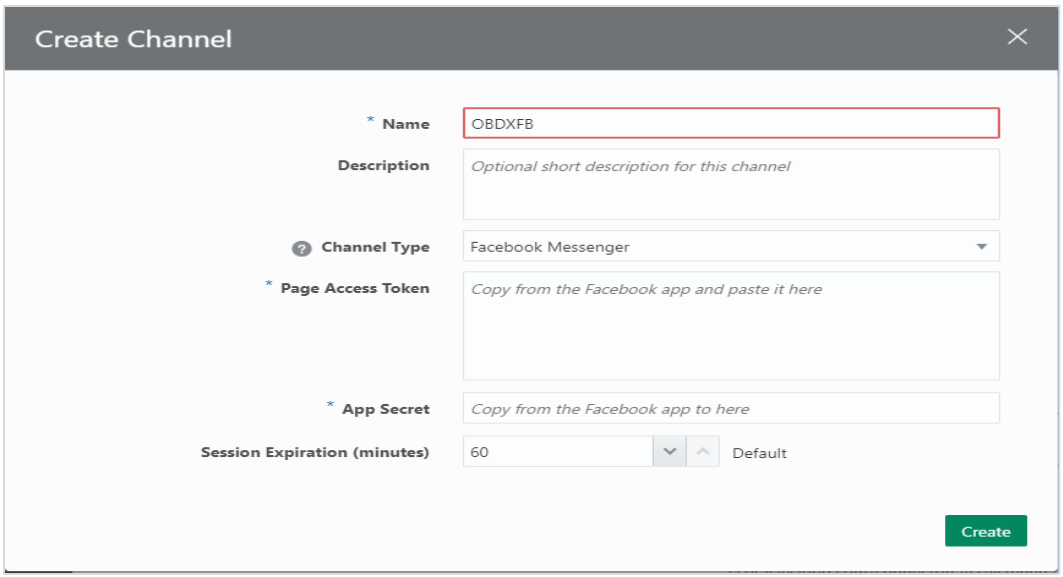
Create Facebook Channel in ODA

1. In ODA ,click channels in the left panel/menu and then click on users.



2. Next, click Add Channel to open the Create Channel dialog.

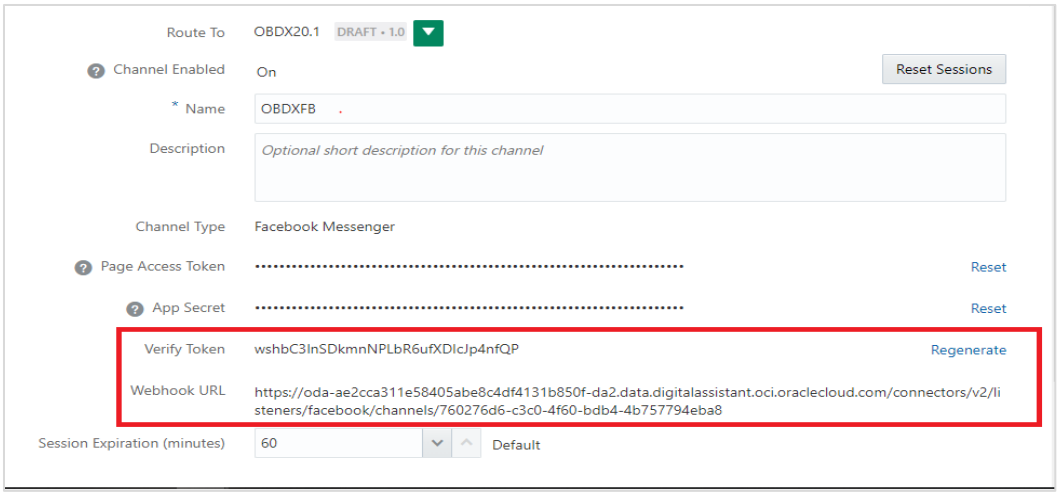
3. Choose Facebook Messenger as the channel type.



4. In the Page Access Token field, paste the page access token that you generated previously in the Set Up Facebook Messenger procedure.

5. In the App Secret field, paste the app secret that you copied previously in the Set Up Facebook Messenger procedure and click Create.

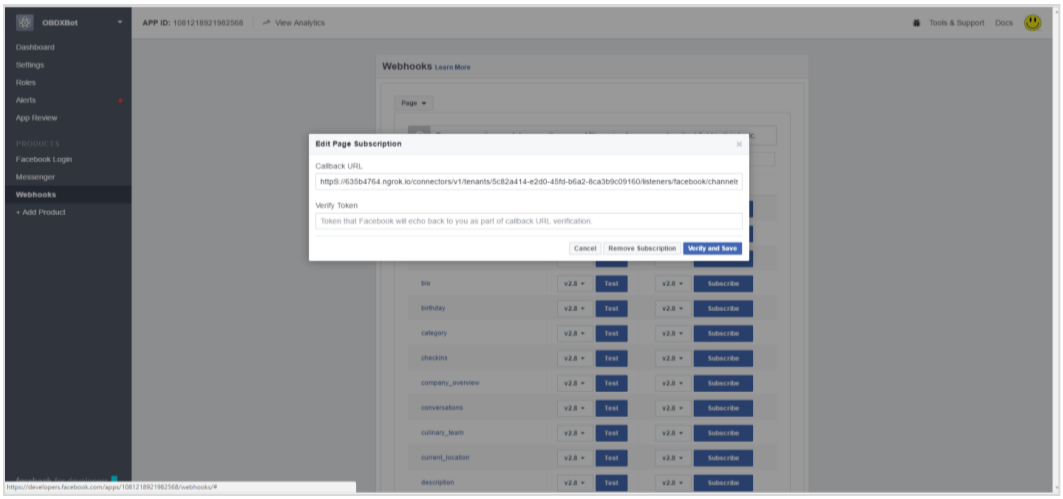
6. In the Channels page, copy both the Verify Token and WebHook URL and paste them somewhere convenient on your system. You'll need these to configure the Facebook webhook.



7. Select the digital assistant or skill that you want to associate with the channel. Switch on the Channel Enabled control to enable it.

Configure the Facebook Messenger Webhook

1. In Facebook Messenger, be sure that you've selected the project that you initially created for the webhook.
2. Click Messenger and then choose Settings .
3. Click Subscribe to Events to open the New Page Subscription dialog.
4. Copy the Webhook URL that you got from the Digital Assistant Channels page and paste it in the CallBack URL field in the New Page Subscription dialog.
5. Copy the Verify Token generated by Digital Assistant and paste it into the Verify Token field.

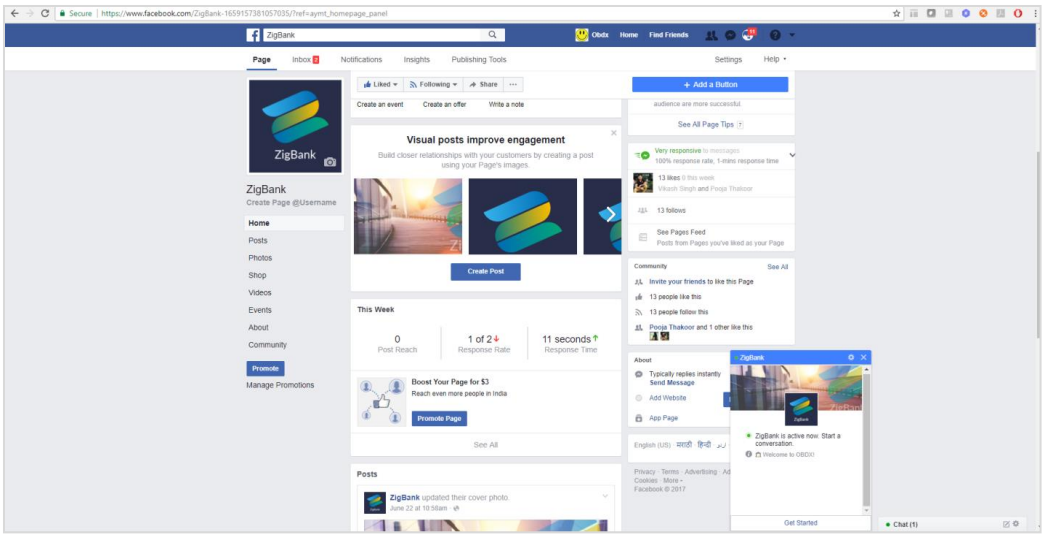


6. Under Subscription Fields, select the messages and messaging_postbacks callback events.The messages event is triggered whenever someone sends a message to your Facebook page.
7. Click Verify and Save.

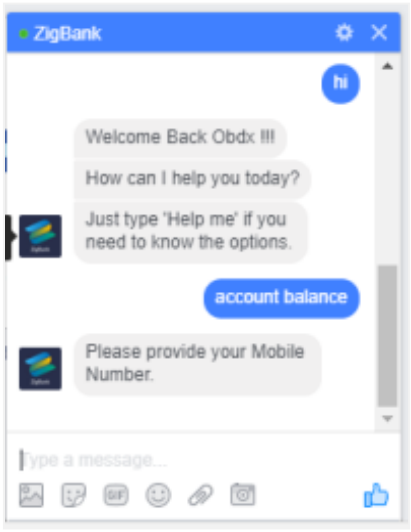
8. In the Webhooks section of the Messenger settings, select the Facebook page for your digital assistant (or standalone skill).Click Subscribe.

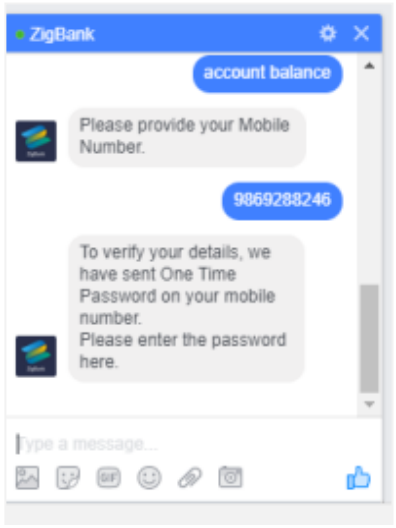
Validating configurations

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



1. Click Get Started in the chat window > You should receive welcome message from ODA
2. Enquire about account balance > OTP should be received on the registered email address of the party in core banking





Home

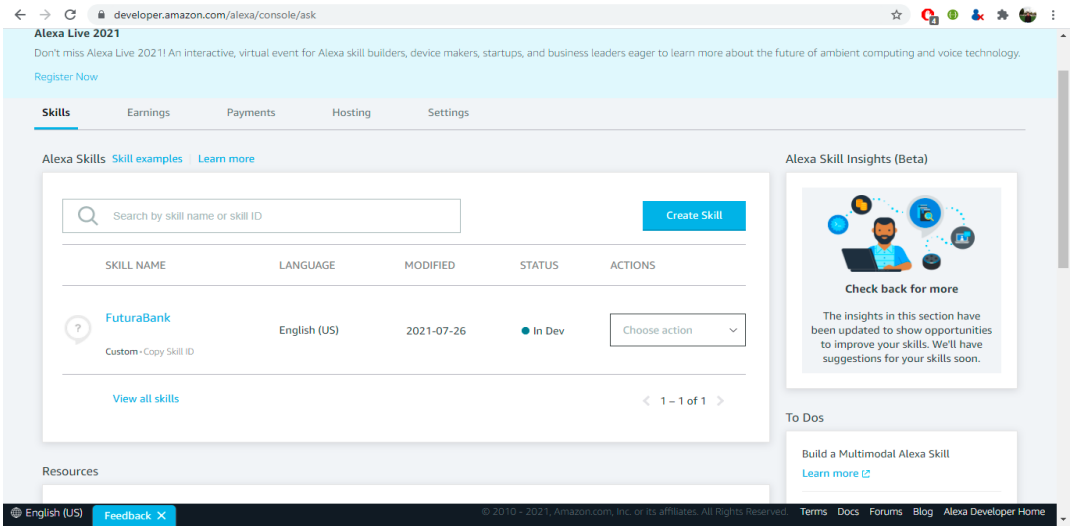
5.5 Alexa Channel

Creating an Alexa skill called *Futura Bank* along with a Webhook channel lets you chat with a specific bot.

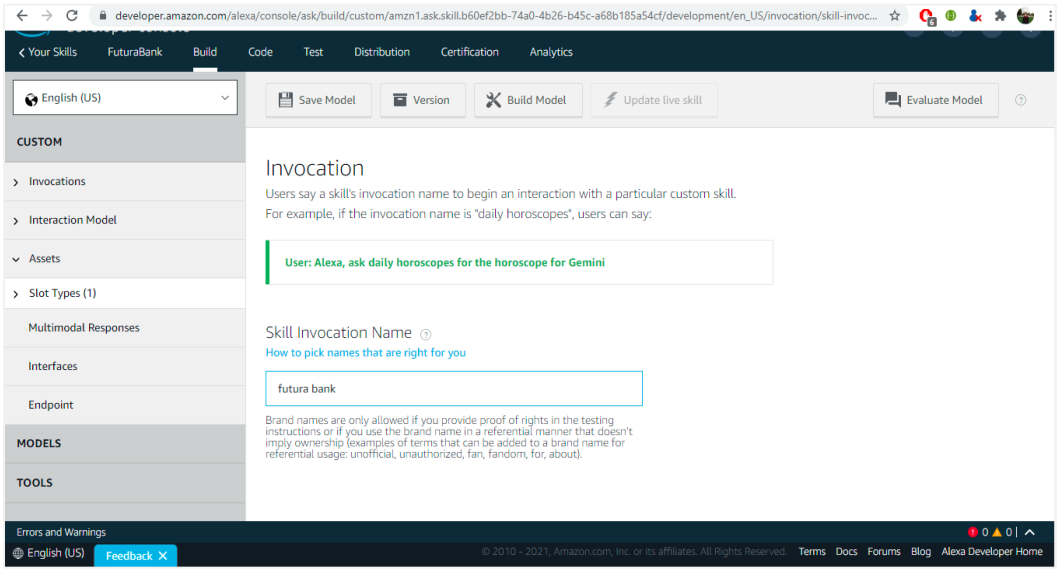
Add the skill information

Set up a developer account in the Amazon Developer Portal.

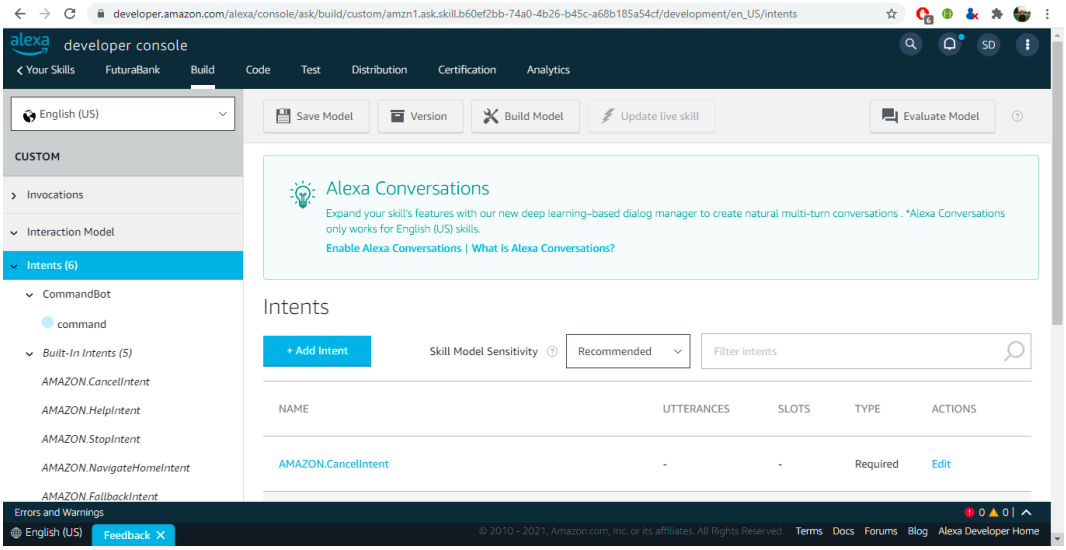
1. Open the **Amazon Developer Console**.
2. Click on **'Create Skill'**



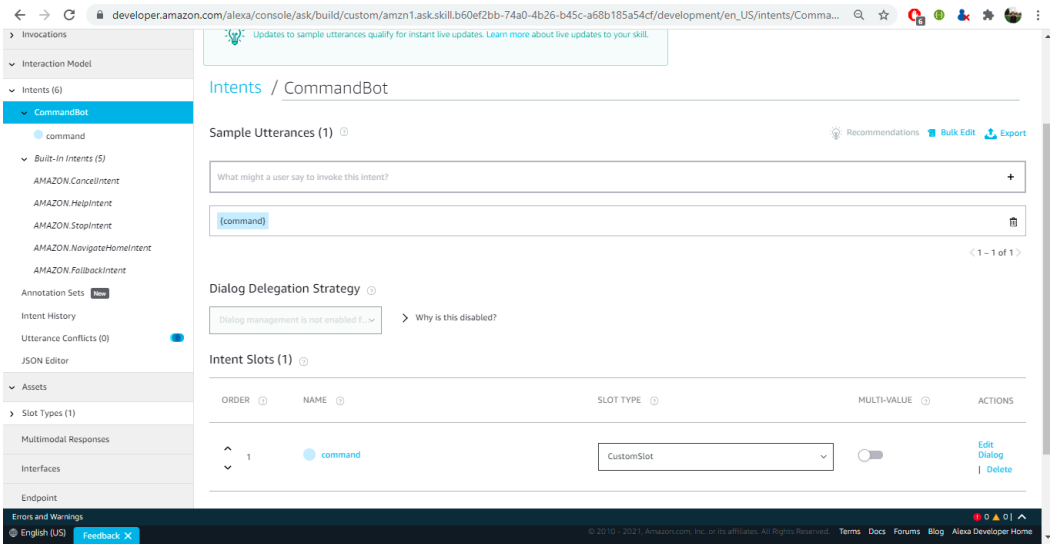
3. Enter Futura Bank (or any name that you want to use to invoke this skill) as the Invocation Name.



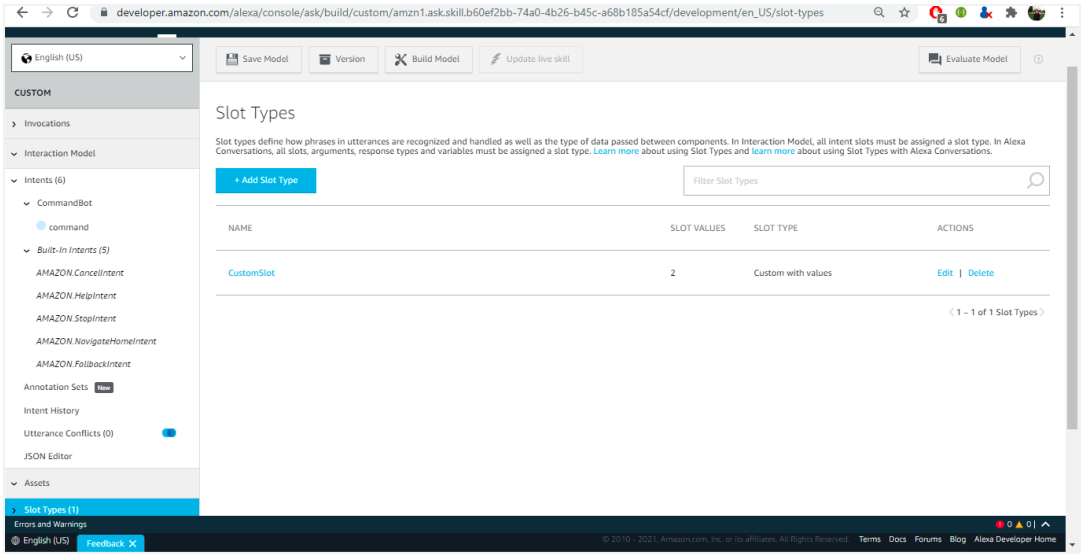
4. Add new intent as CommandBot

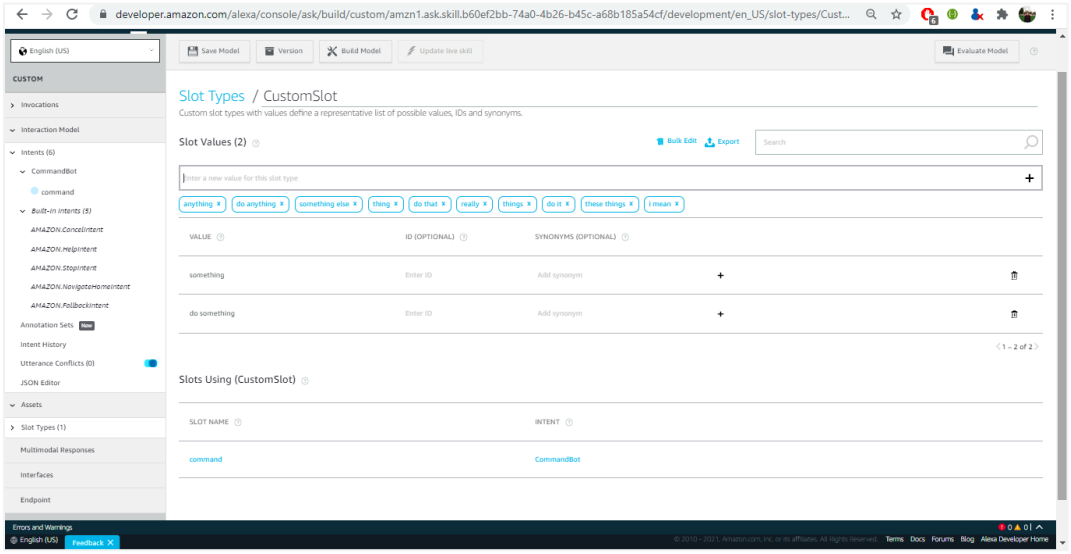


5. Add sample utterance to it

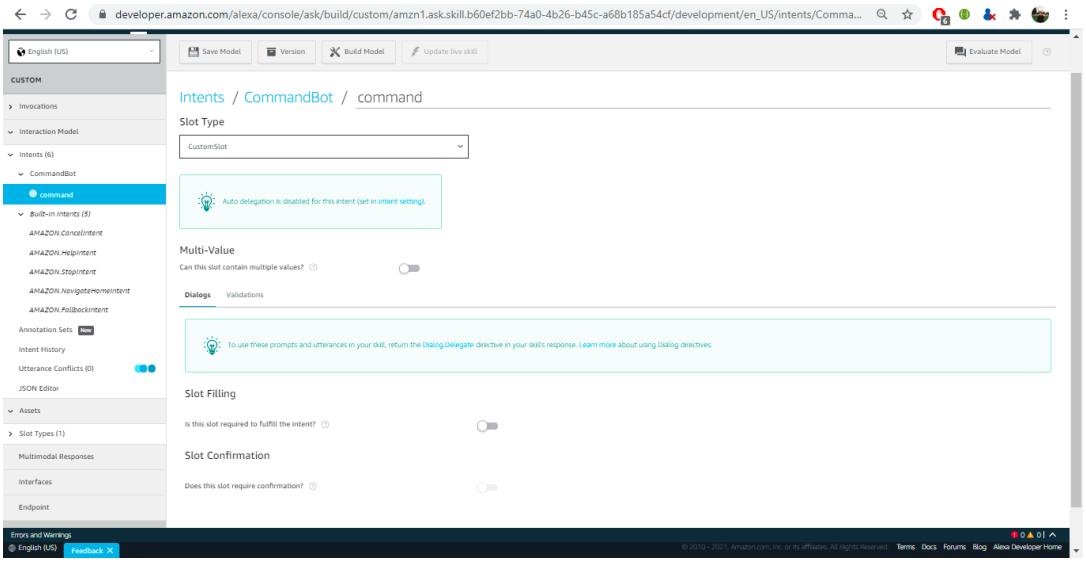


6. Create custom slot

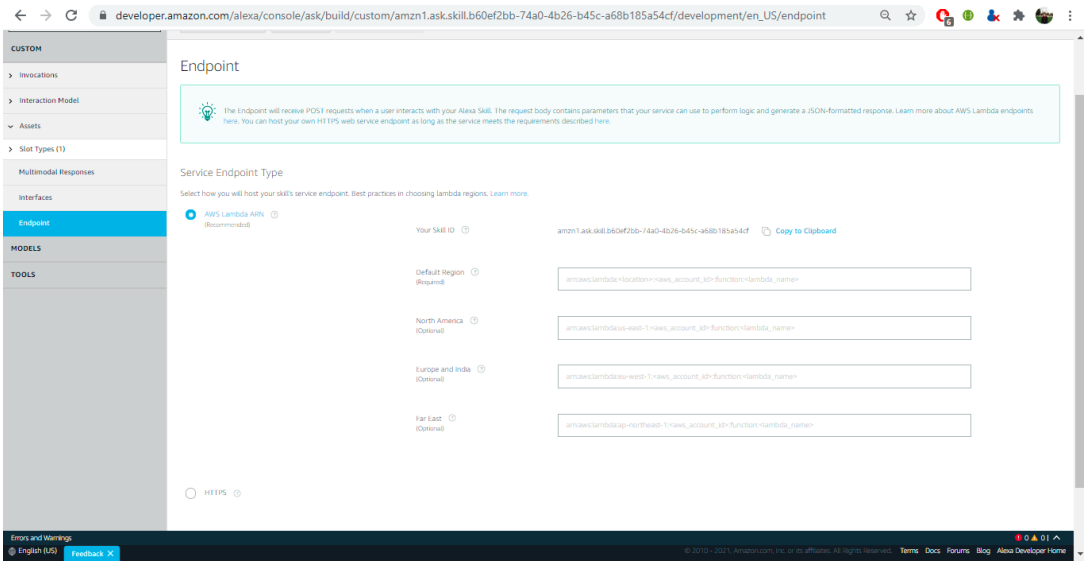




7. Update this CustomSlot in previously added intent

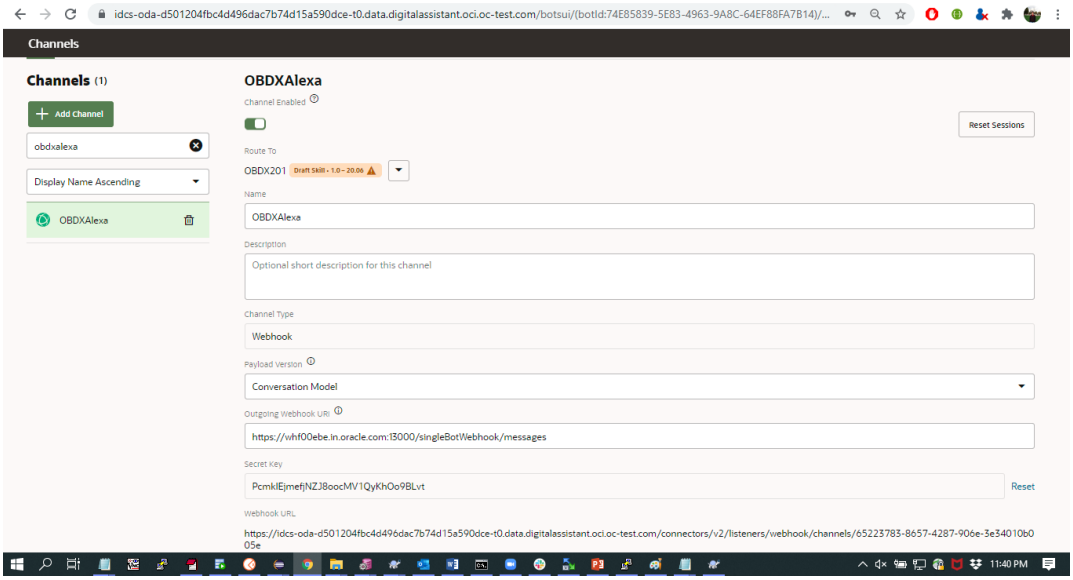


8. Click Build Model in Build Tab
9. Update endpoint and add CA
10. Note the skill ID



Create a Webhook channel in ODA

1. In the Bot Builder, create a webhook channel for your bot. In the Create Channel dialog, enter the outgoing Webhook URL as **https://bots-samples-nodejs:8889/ext/apps/alexa-singleBot/singleBotWebhook/messages.** This URL is where your bot will send its responses back to the Alexa Futura Bot skill.



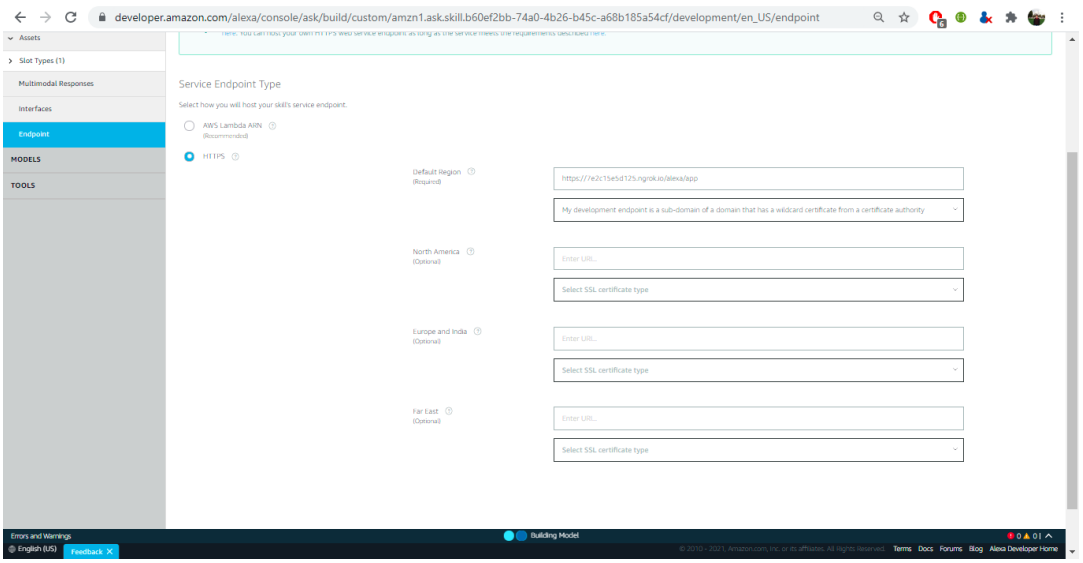
Update amzn_appId, channelSecretKey & channelUrl in service.js

Run nodeJS script

npm install

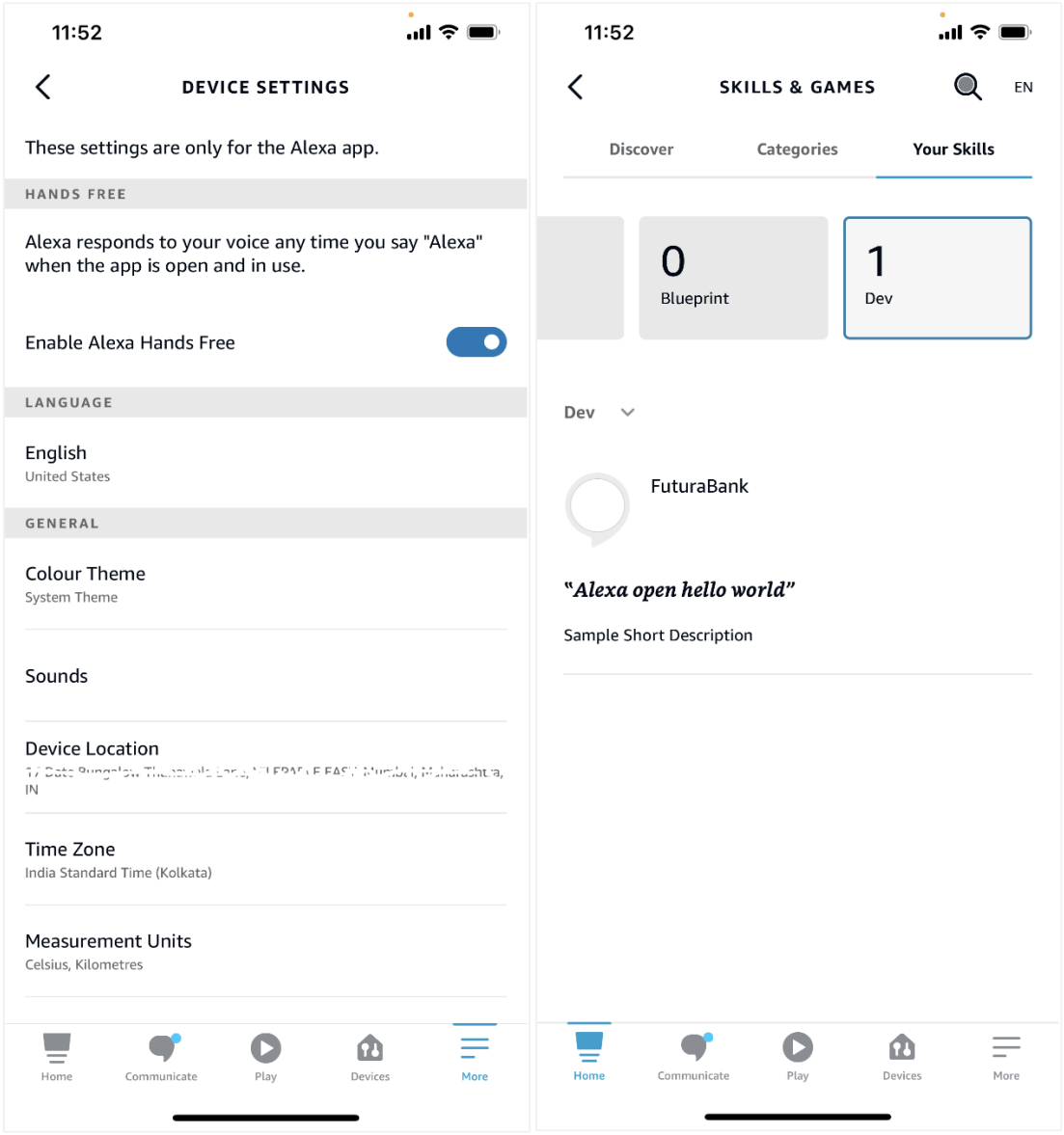
node index.js

This must be publicly hosted in https url. Enter this URL in below screen



2. In the Alexa Mobile App – ensure that the skill is visible

Change the language to English US



Home