Chatbot Configuration Guide
Oracle Banking Digital Experience
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Chatbot Configuration Guide

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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/

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Table of Contents

1. Preface 1–1

1.1 Purpose 1–1

1.2 Audience 1–1

1.3 Documentation Accessibility 1–1

1.4 Critical Patches 1–1

1.5 Diversity and Inclusion 1–1

1.6 Conventions 1–1

1.7 Screenshot Disclaimer 1–2

1.8 Acronyms and Abbreviations 1–2

2. Purpose 2–1

3. Topology 3–1

4. Common Configurations 4–1

4.1 ODA Configurations 4–1

5. Configuring Channels in ODA 5–1

5.1 Web Channel 5–1

5.2 Android Channel 5–2

5.3 iOS Channel 5–2

5.4 Facebook Channel 5–3

5.5 Alexa Channel 5–10

5.6 WhatsApp Channel 5–20

1. Preface

1.1 Purpose

Welcome to the User Guide for Oracle Banking Digital Experience. This guide explains the operations that the user will follow while using the application.

1.2 Audience

This manual is intended for Customers and Partners who setup and use Oracle Banking Digital Experience.

1.3 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.

Access to Oracle Support

Oracle customers that have purchased support 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 Critical Patches

Oracle advises customers to get all their security vulnerability information from the Oracle Critical Patch Update Advisory, which is available at Critical Patches, Security Alerts and Bulletins. All critical patches should be applied in a timely manner to ensure effective security, as strongly recommended by Oracle Software Security Assurance.

1.5 Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

1.6 Conventions

The following text conventions are used in this document:

Convention	Meaning

boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
Italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1.7 Screenshot Disclaimer

The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.

1.8 Acronyms and Abbreviations

The list of the acronyms and abbreviations that you are likely to find in the manual are as follows:

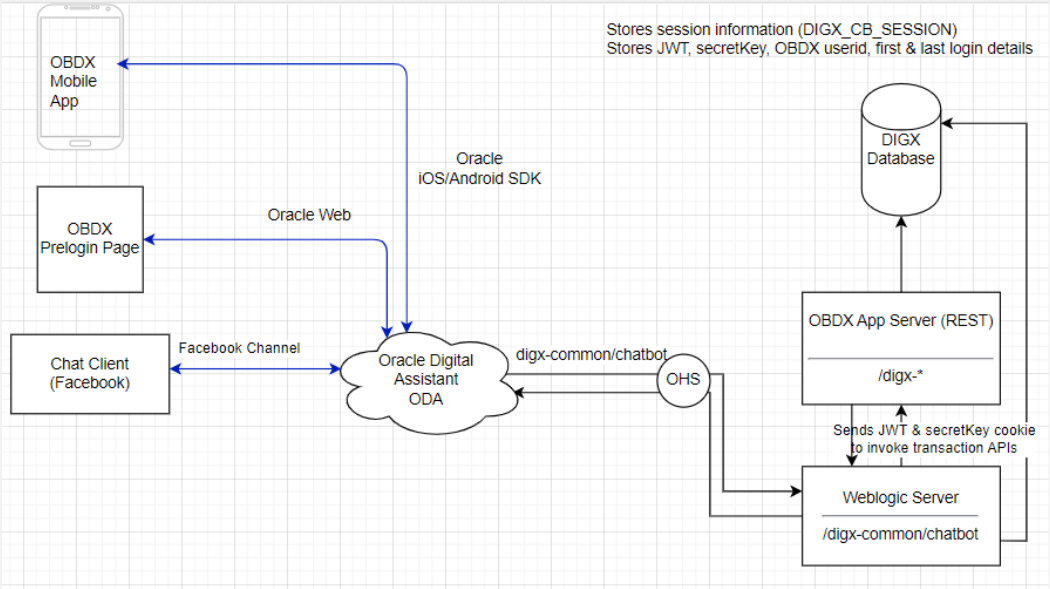
Abbreviation	Description
OBDX	Oracle Banking Digital Experience

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

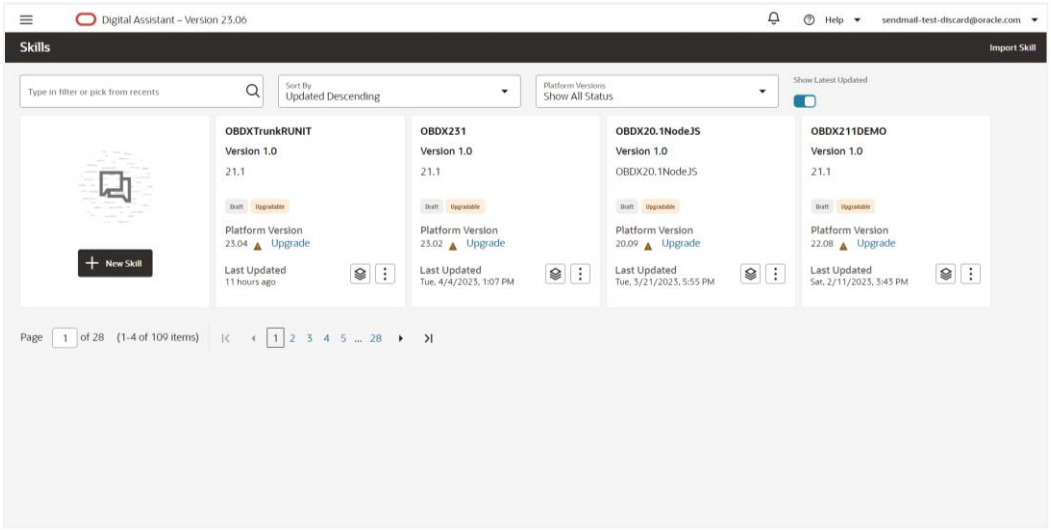
3. Topology


Stores session information (DIGX_CB_SESSION)
Stores JWT, secretKey, OBDX userid, first & last login details
OBDX Mobile App
Oracle iOS/Android SDK
DIGX Database
OBDX Prelogin Page
Oracle Web
OBDX App Server (REST)
/digx-*
Chat Client (Facebook)
Facebook Channel
Oracle Digital Assistant ODA
digx-common/chatbot
OHS
Sends JWT & secretKey cookie to invoke transaction APIs
Weblogic Server
/digx-common/chatbot

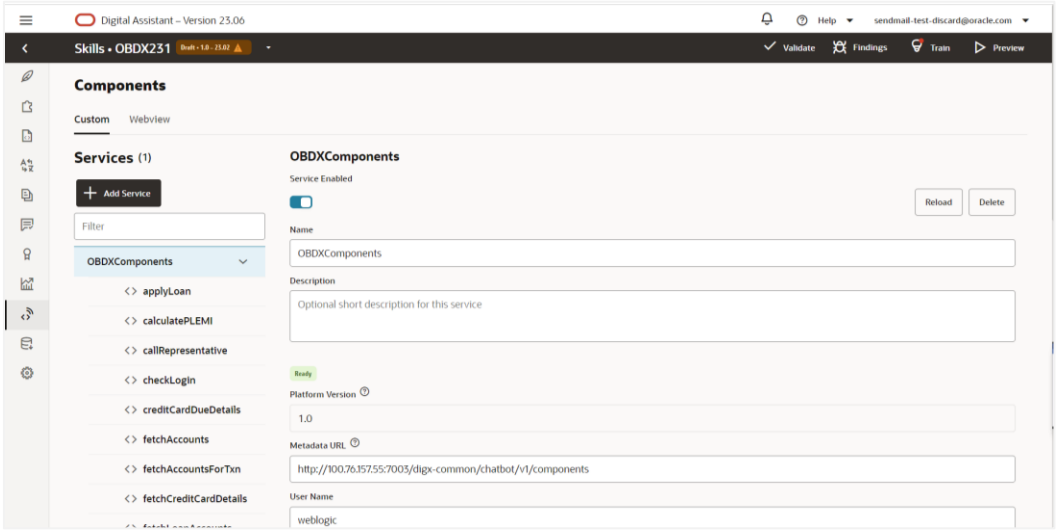
4. Common Configurations

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.

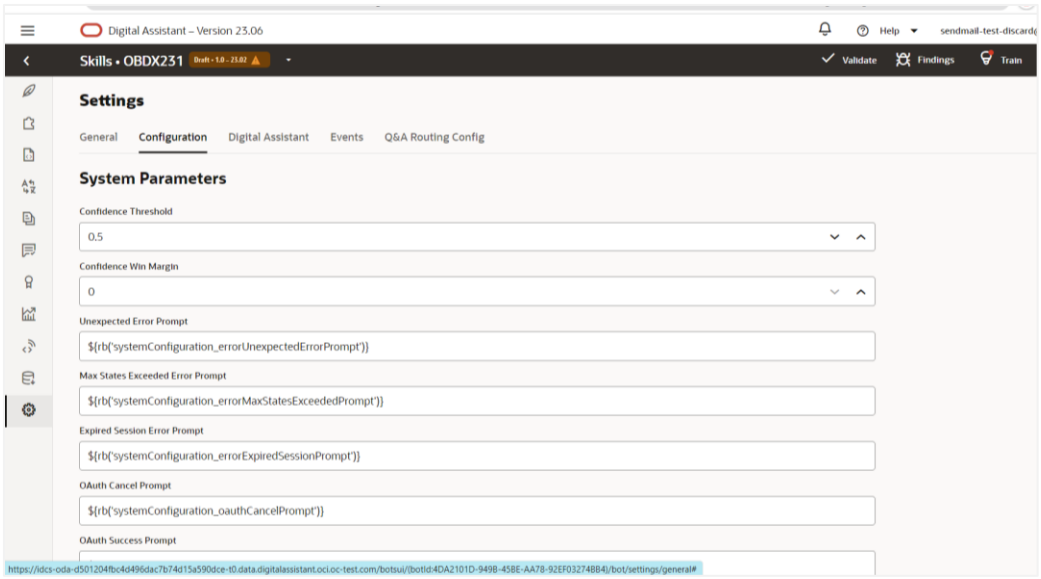


2. Click on the OBDX Bot and click on the components to add the custom components.

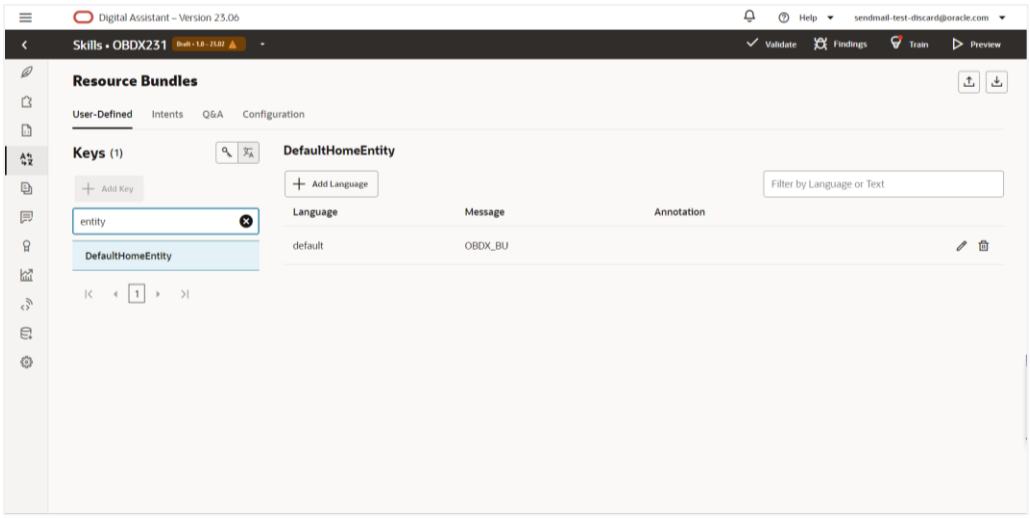


3. Put the OBDX URL here. The OBDX setup and the ODA setup must be accessible over Internet.
4. Add username/password (in HTTP Basic authorization) of any user with Administrators role which can be used to login in OBDX Weblogic server.

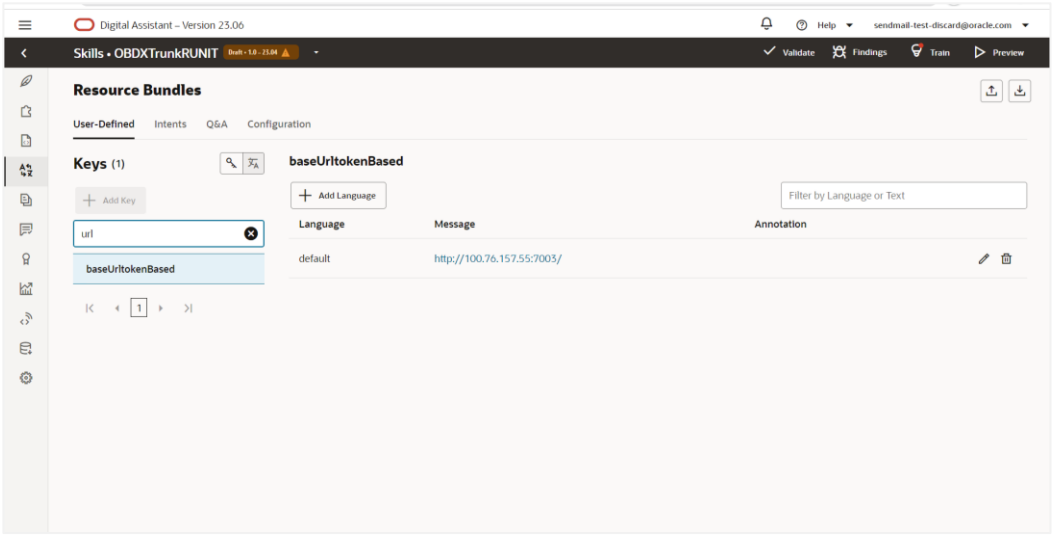
5. In order to configure intent threshold for the skill go to settings tab in a bot and click configurations to configure threshold frequency (default 0.5) as shown below-



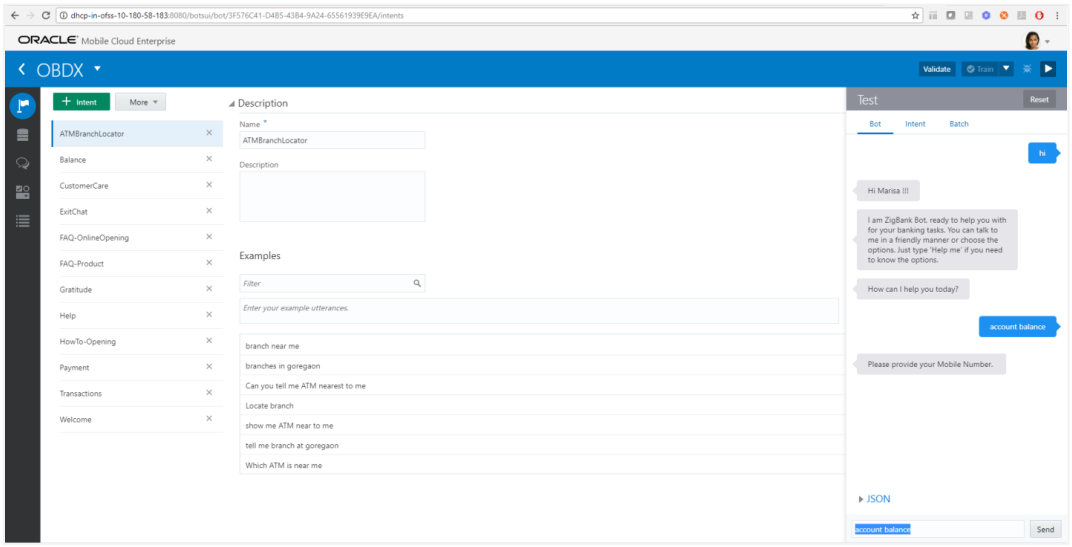
6. Configure required entity in a resource bundles (one created/configured in OBDX). At a time chatbot works with single entity. Go to Resource Bundles as shown below-



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



8. Login to ODA and click OBDXBot > Test



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.

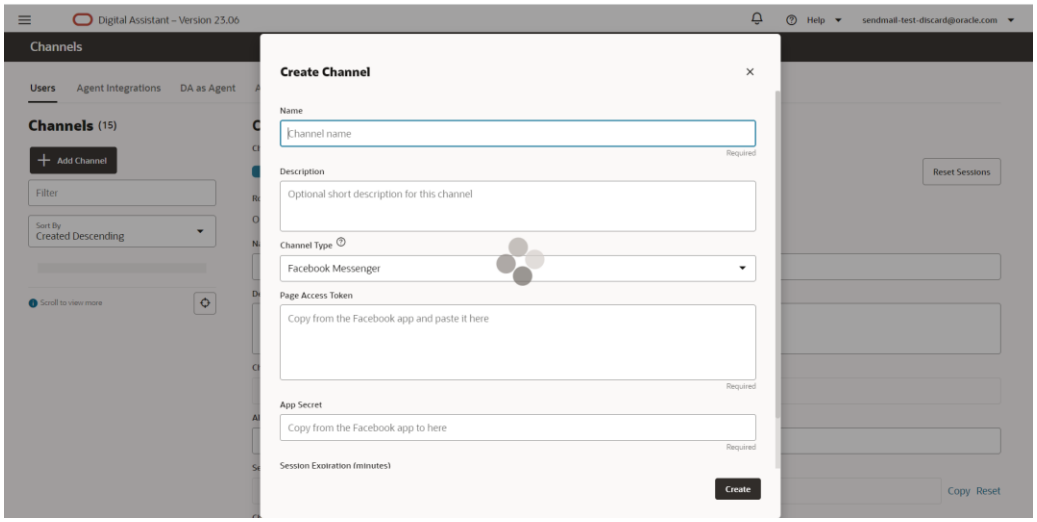
Chatbot widget appears on prelogin page in OBDX UI where the login is with mobile number/(OTP or PIN or Soft Token)

For post login, the browser session is automatically used

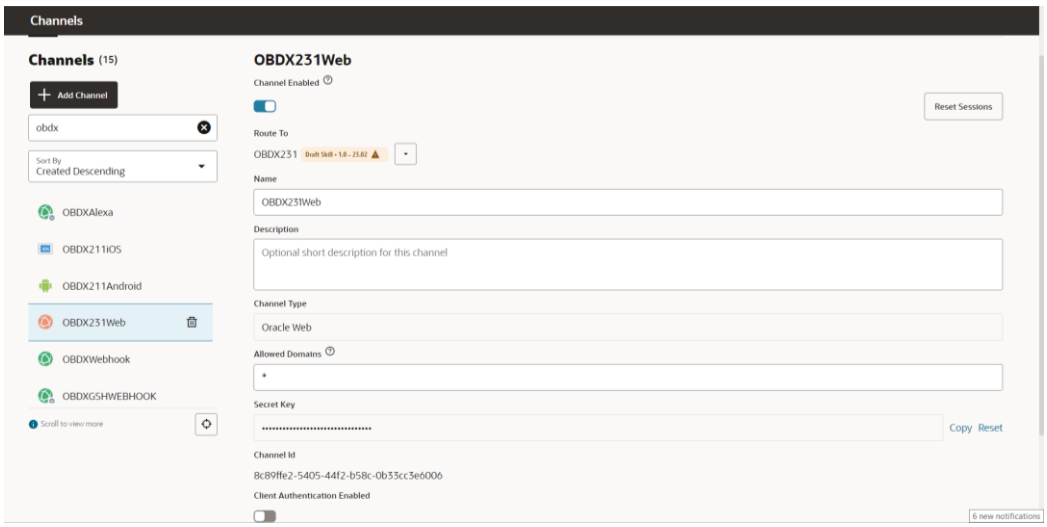
5.1 Web Channel

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

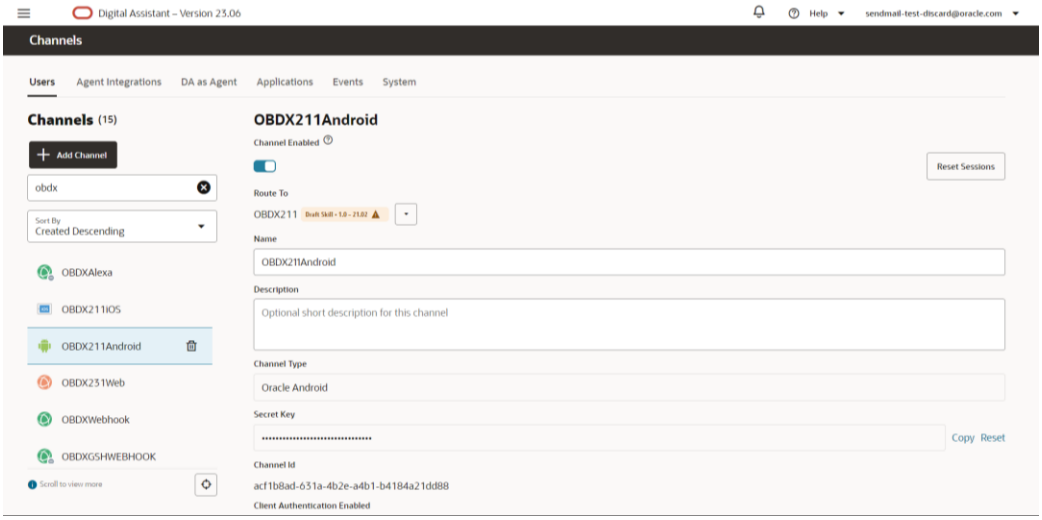
To remove this chatbot widget

- 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.

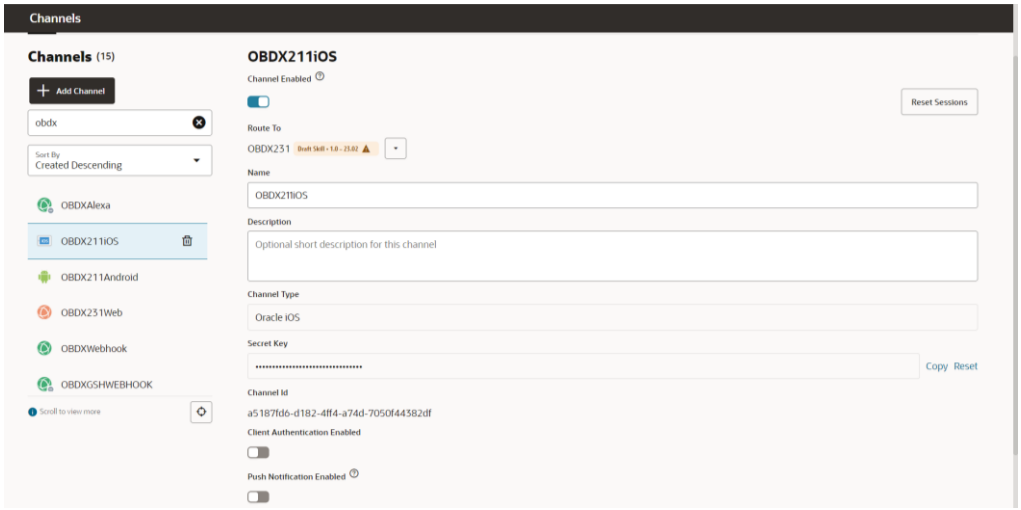


3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.3 iOS Channel

In order to configure this channel:

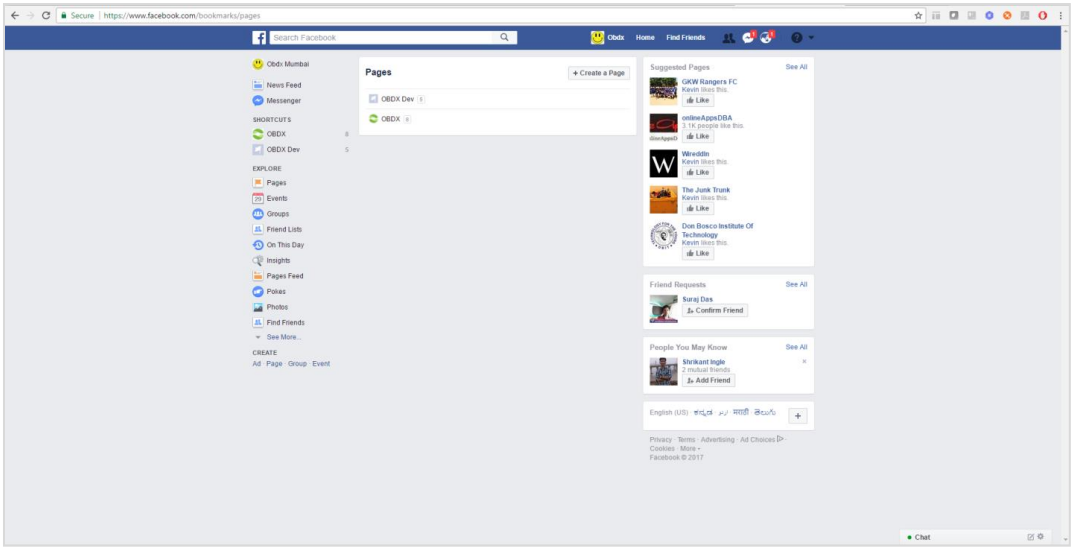
1. Choose Development->Channels->Users from the menu. Click Add Channel.
2. Add Oracle iOS as the channel type.



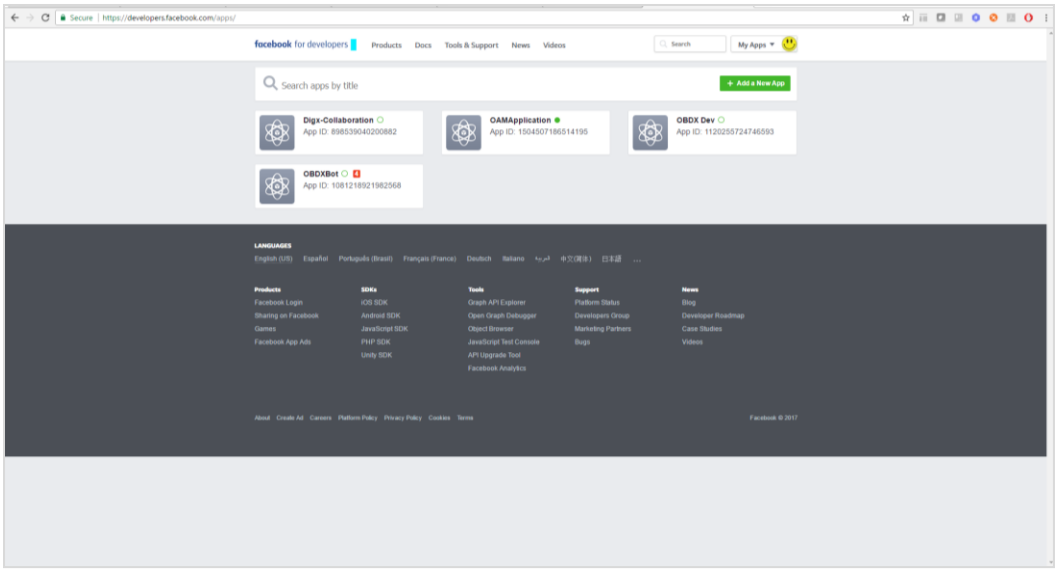
3. Route the channel to your skill or digital assistant.
4. Switch Channel Enabled to On.
5. Note the channel Id. This is required in app configuration

5.4 Facebook Channel

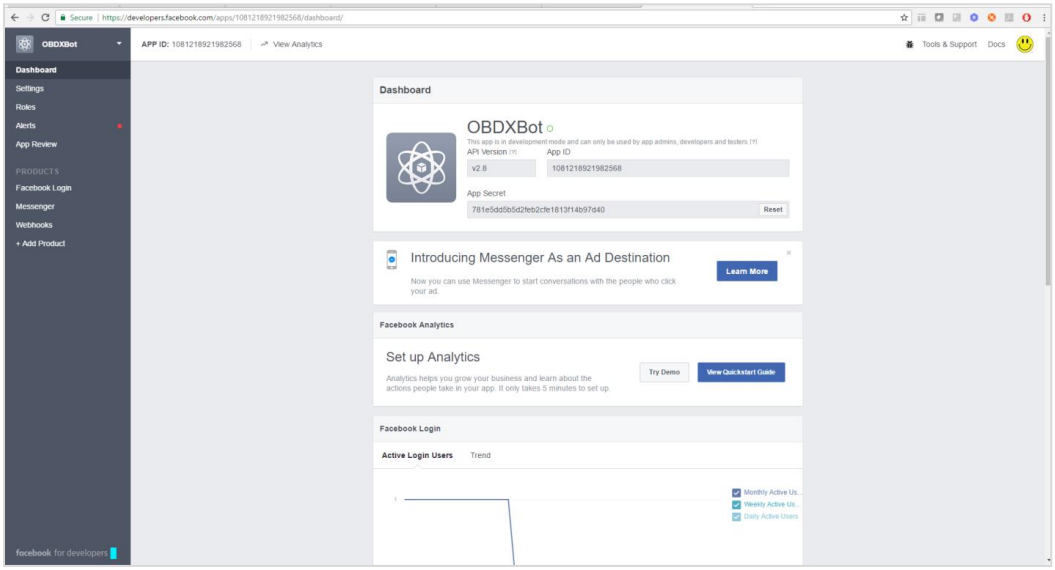
1. Create a Facebook account for the Bank. Login to Facebook with credentials.
2. Create a new page



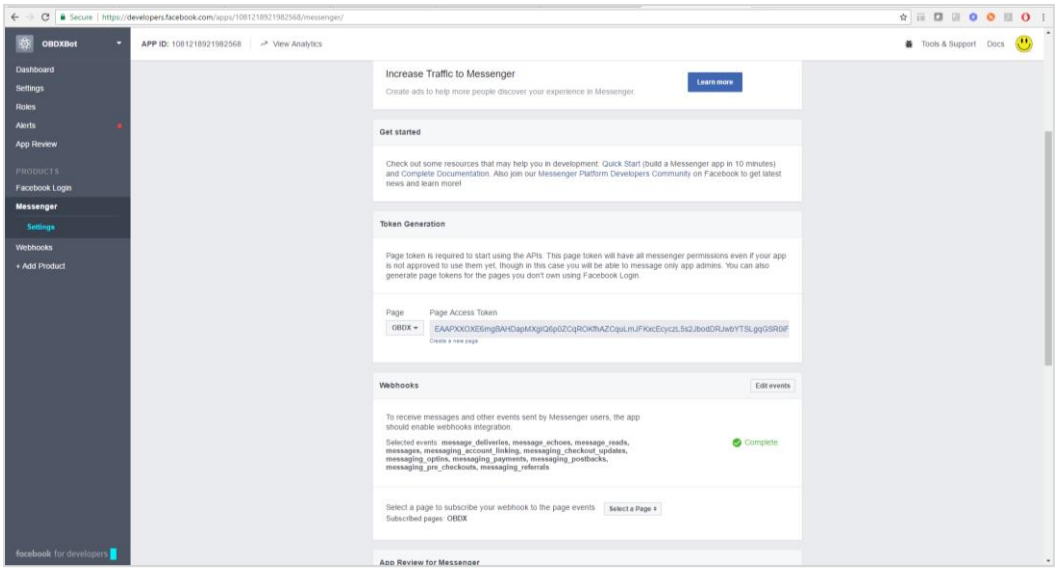
3. Navigate to developer link and create an application as shown below



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

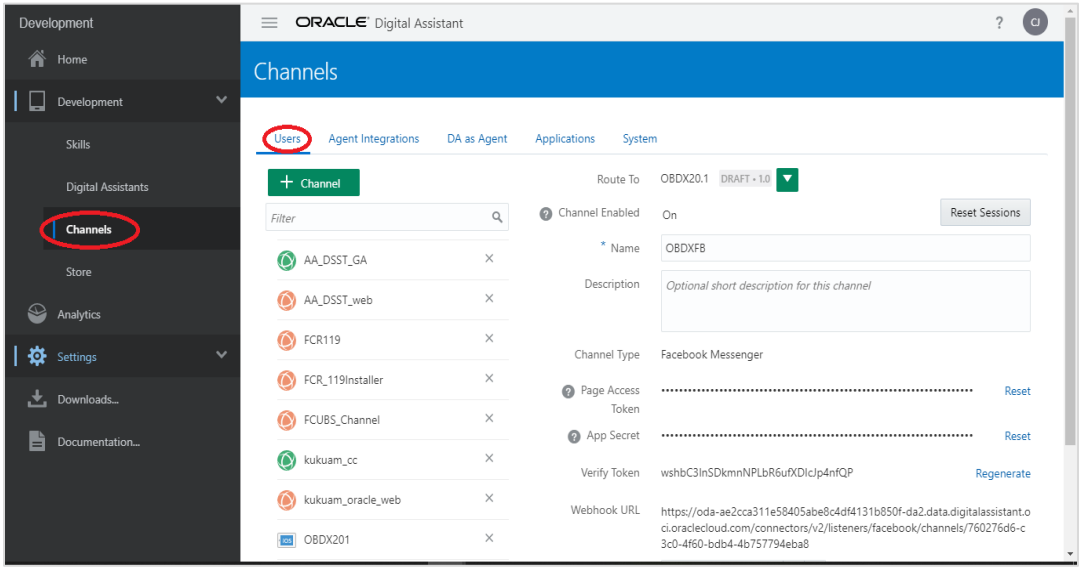


5. Navigate to Messenger > Settings page from left panel and in token generation section select the page created previously. Note the page access token.


Secure | https://developers.facebook.com/apps/1081218921982568/messenger/
OBDXBot
APP ID: 1081218921982568
View Analytics
Tools & Support
Docs
Dashboard
Settings
Roles
Alerts
App Review
PRODUCTS
Facebook Login
Messenger
Settings
Webhooks
+ Add Product
facebook for developers
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
EAAPXkOXE6mgBAHDapMXgIQ6p0ZCqROKfhAZCquLmJFKxcEcyczL5s2JbodDRJwbYTSLgqGSR0lF
Create a new page
Webhooks
Edit events
To receive messages and other events sent by Messenger users, the app should enable webhooks integration.
Selected events: message_deliveries, message_echoes, message_reads, messages, messaging_account_linking, messaging_checkout_updates, messaging_optins, messaging_payments, messaging_postbacks, messaging_pre_checkouts, messaging_referrals
Complete
Select a page to subscribe your webhook to the page events
Select a Page
Subscribed pages: OBDX
App Review for Messenger

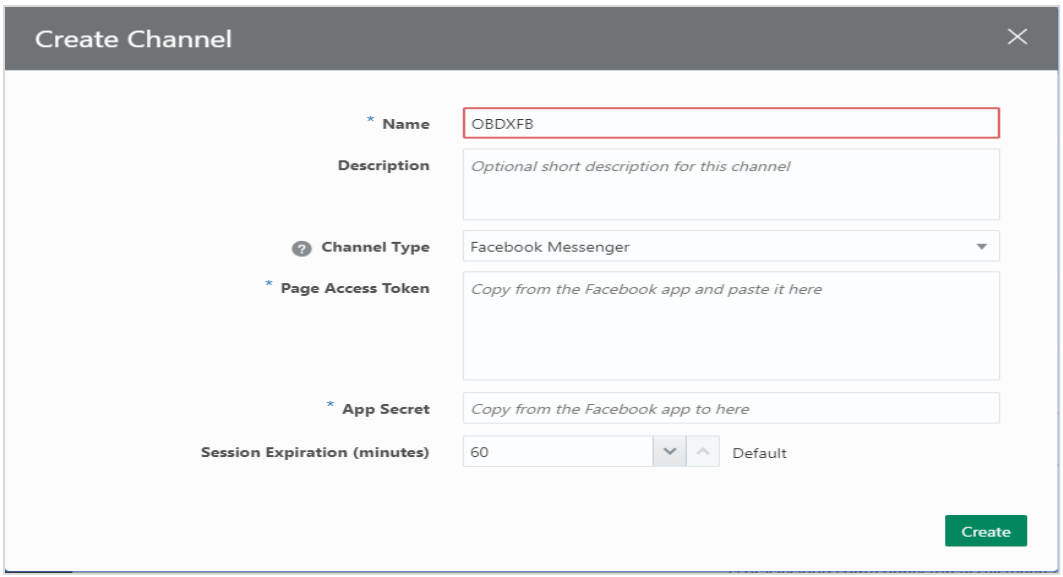
Create Facebook Channel in ODA

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.

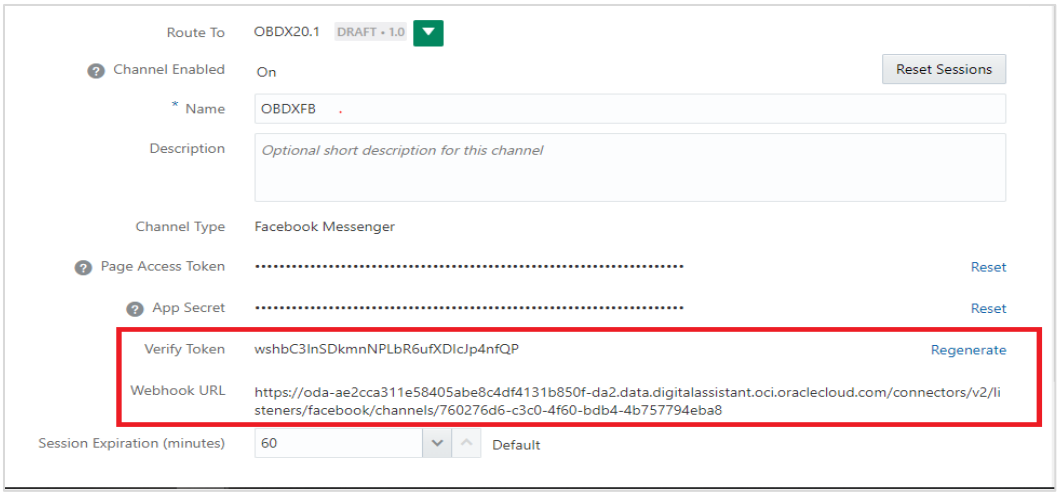
3. Choose Facebook Messenger as the channel type.



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.

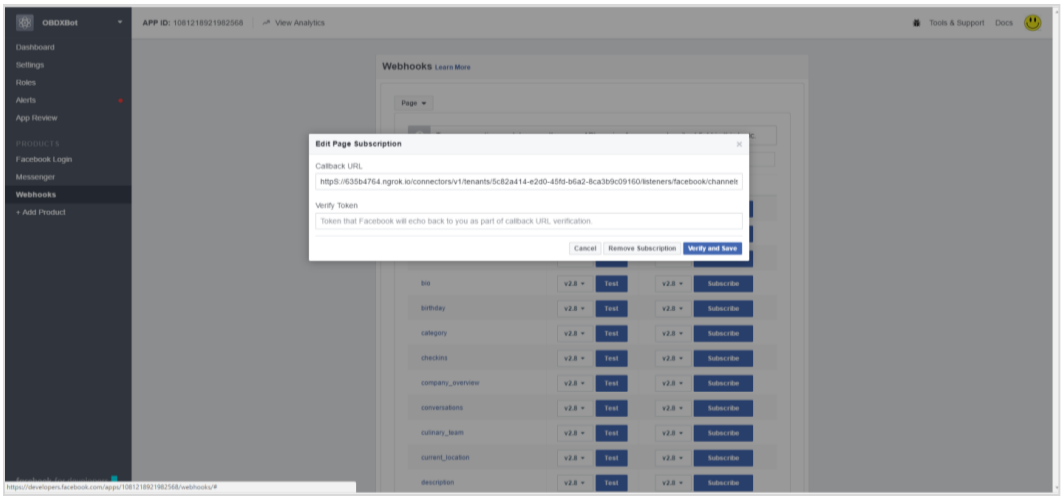
6. In the Channels page, copy both the Verify Token and WebHook URL and paste them somewhere convenient on your system. You'll need these to configure the Facebook webhook.



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.

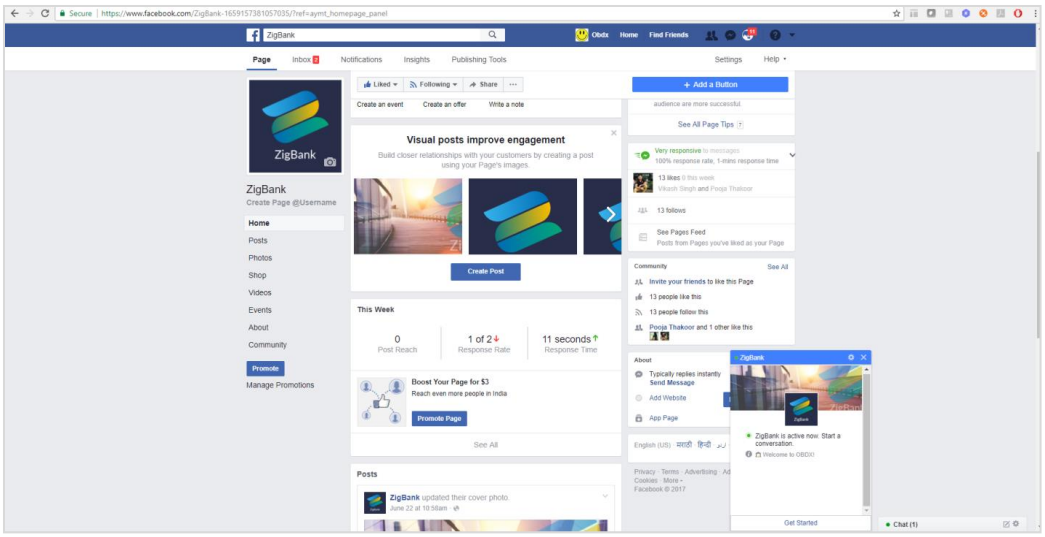


6. Under Subscription Fields, select the messages and messaging_postbacks callback events.The messages event is triggered whenever someone sends a message to your Facebook page.
7. Click Verify and Save.

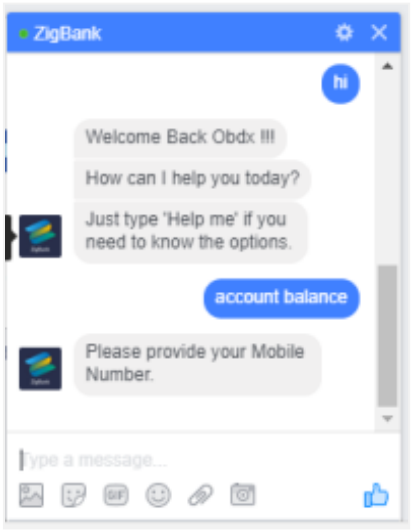
8. In the Webhooks section of the Messenger settings, select the Facebook page for your digital assistant (or standalone skill).Click Subscribe.

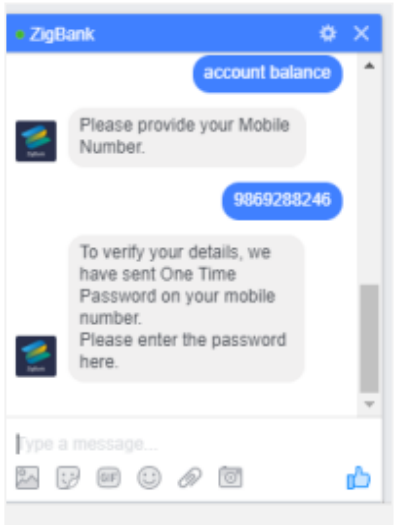
Validating configurations

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





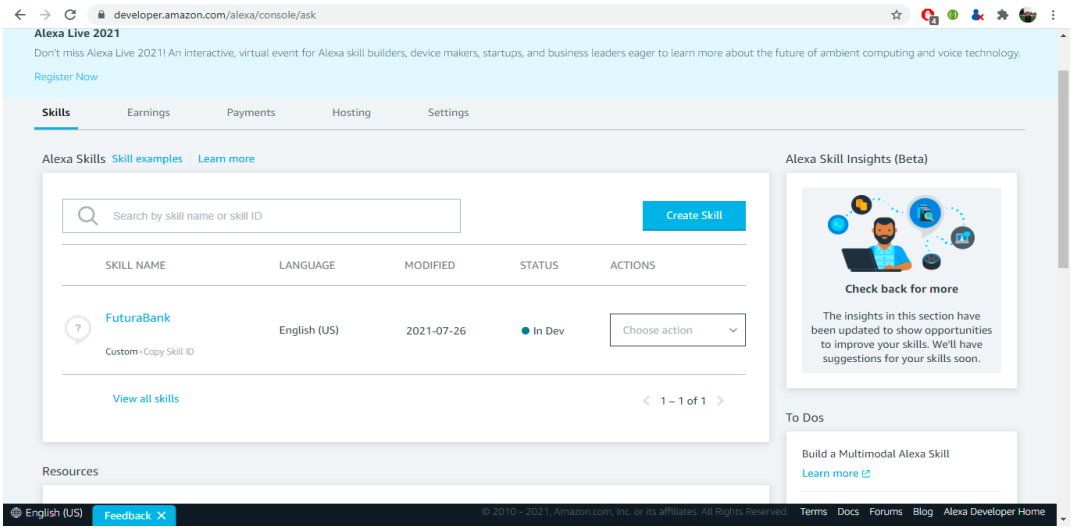
5.5 Alexa Channel

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

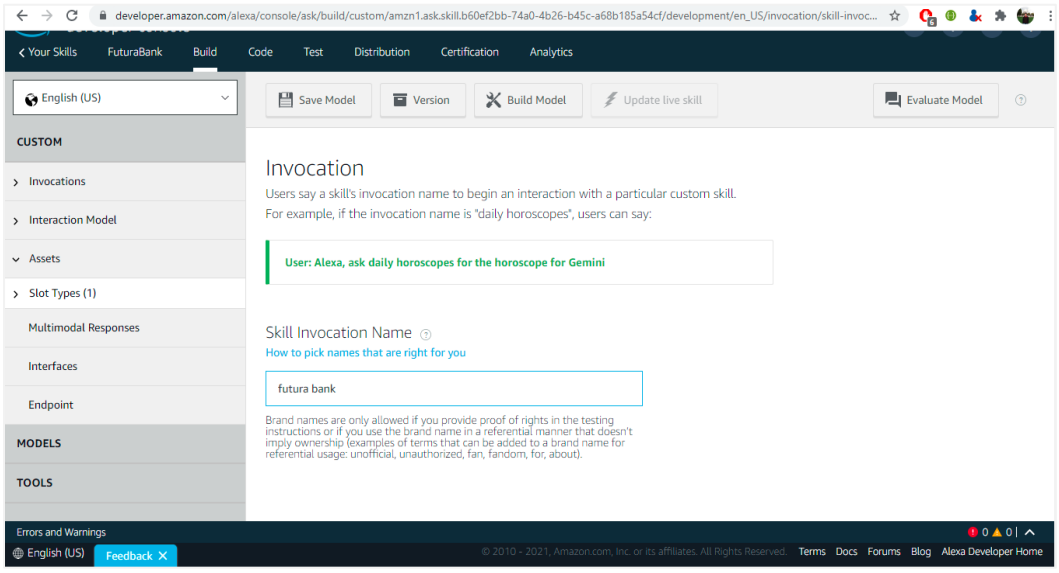
Add the skill information

Set up a developer account in the Amazon Developer Portal.

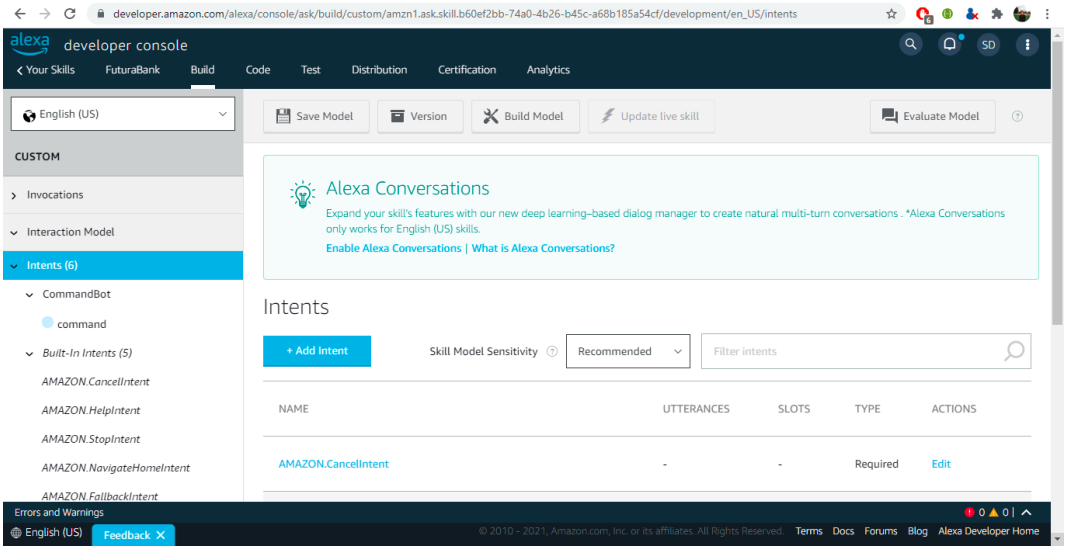
1. Open the **Amazon Developer Console.**
2. Click on **'Create Skill'**



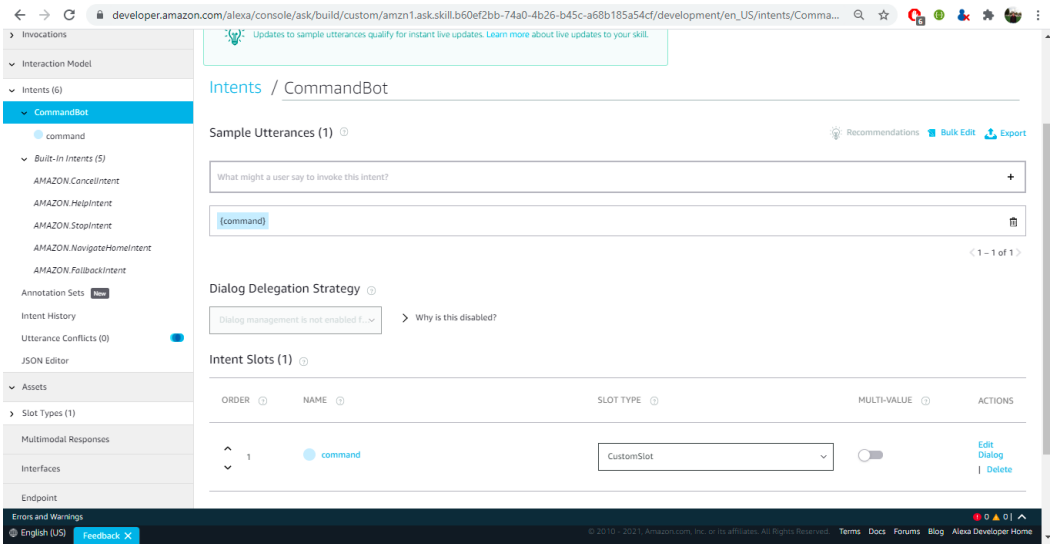
3. Enter Futura Bank (or any name that you want to use to invoke this skill) as the Invocation Name.



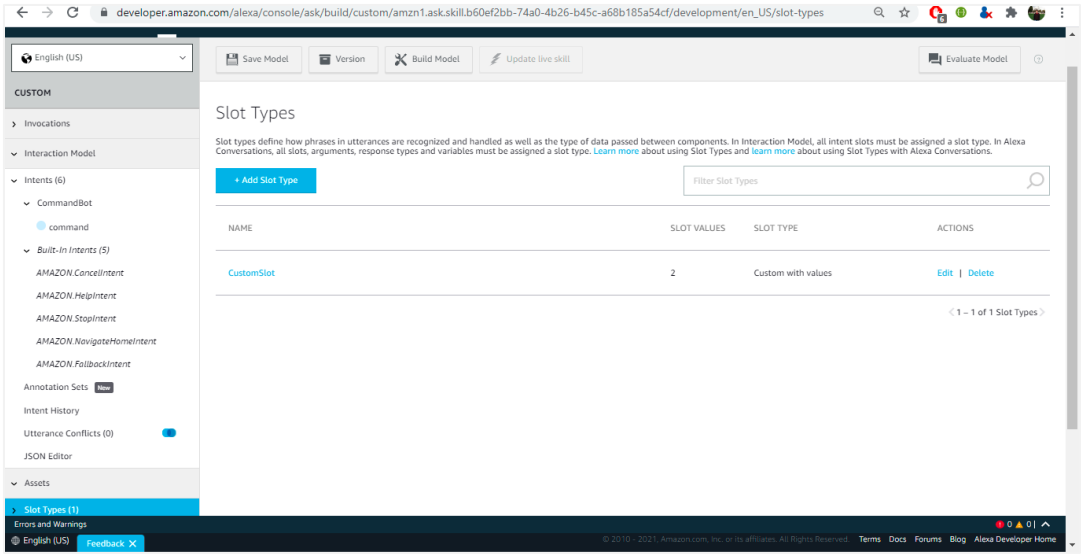
4. Add new intent as CommandBot.

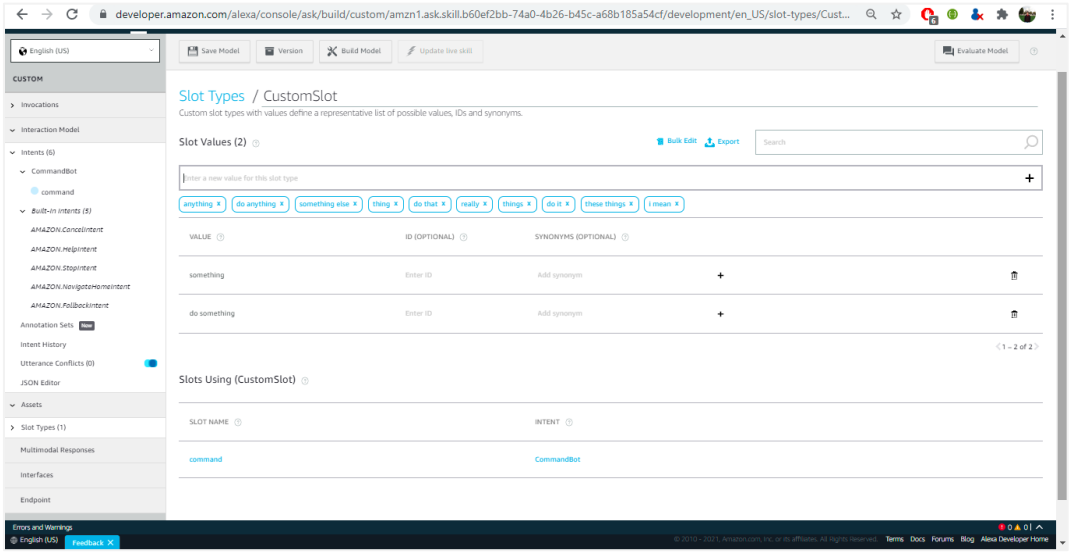


5. Add sample utterance to it.

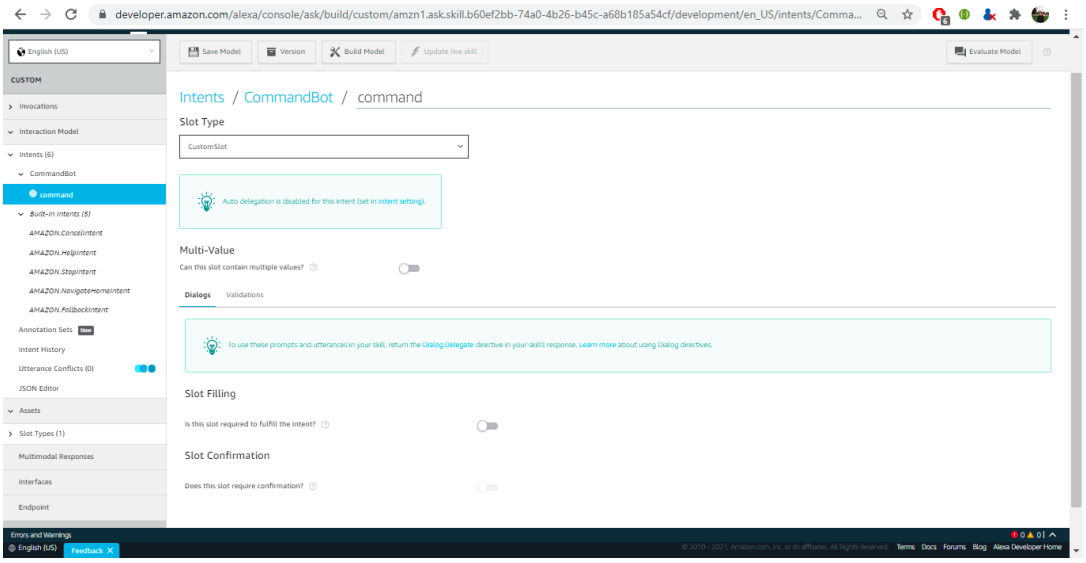


6. Create custom slot.

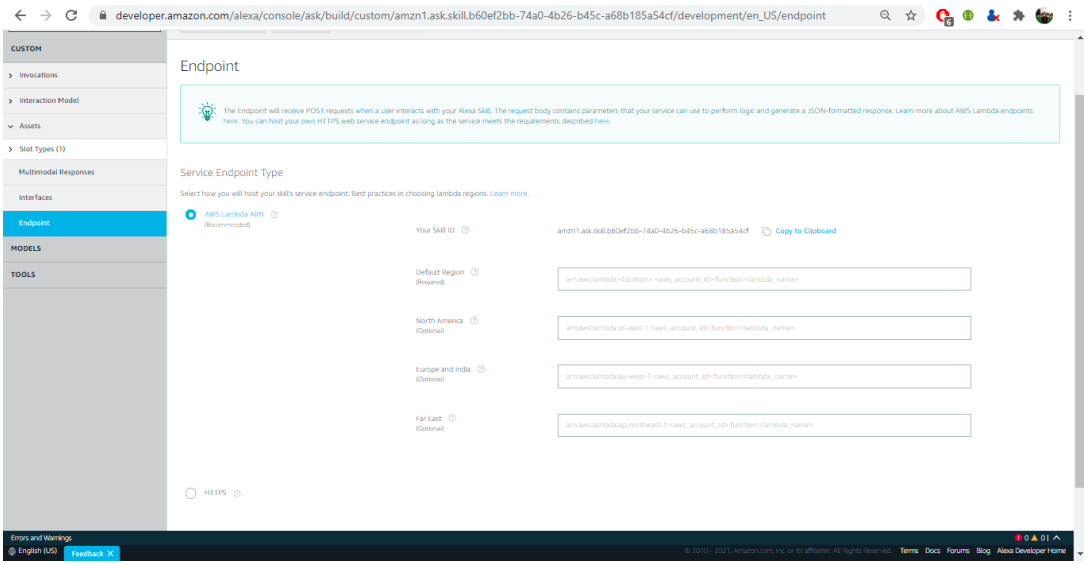




7. Update this CustomSlot in previously added intent.

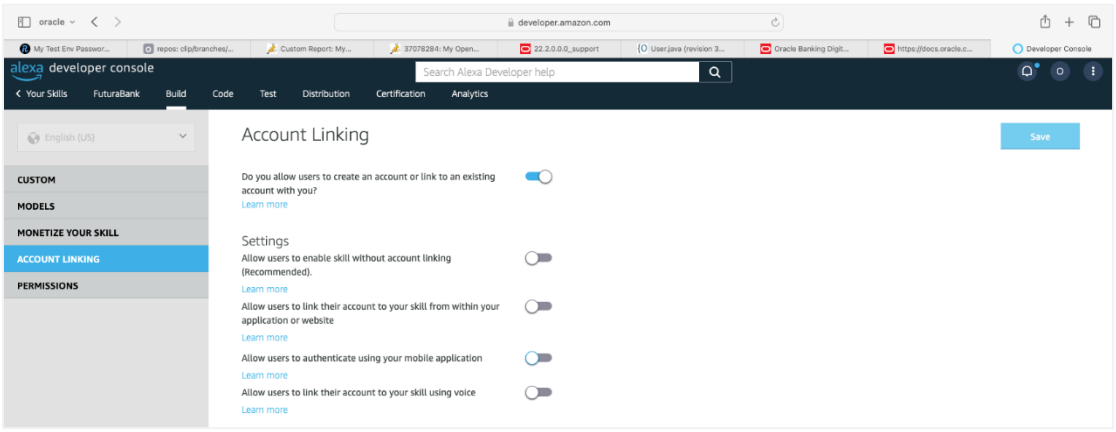


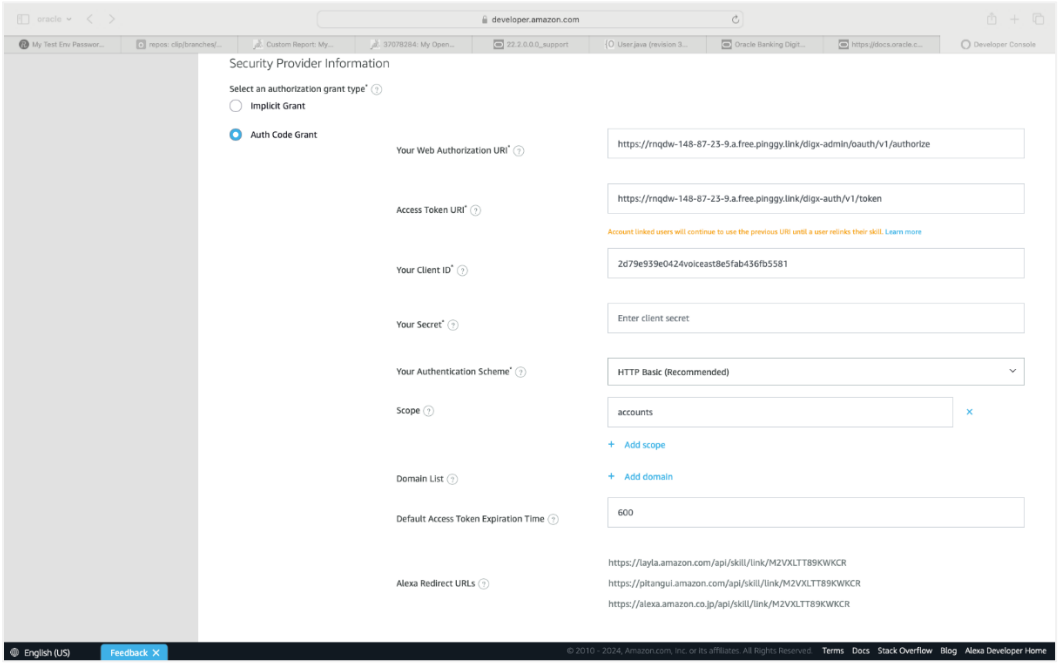
8. Click Build Model in Build tab.
9. Update endpoint and add CA.
10. Note the skill ID.



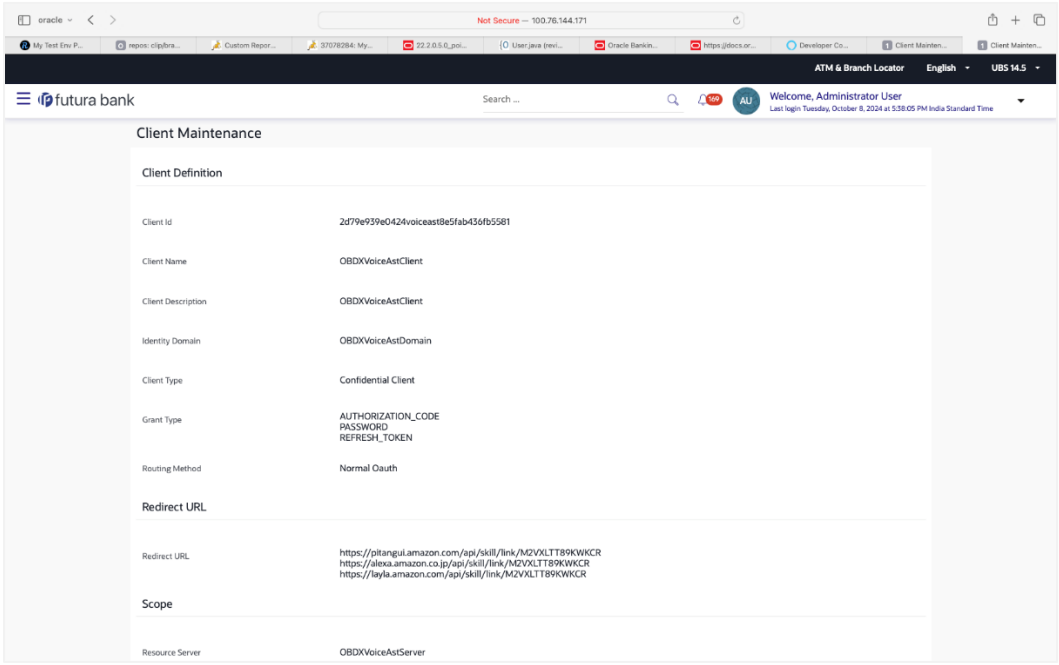
Setup Account Linking for Alexa

1. Go to Account Linking Tab in Alexa console and enable “allow users to create an account or link to an existing account”.
2. In Security Provider Information select “Auth Code Grant” and set your web authorization uri ,and access token URI.
3. Set scope to “accounts” .

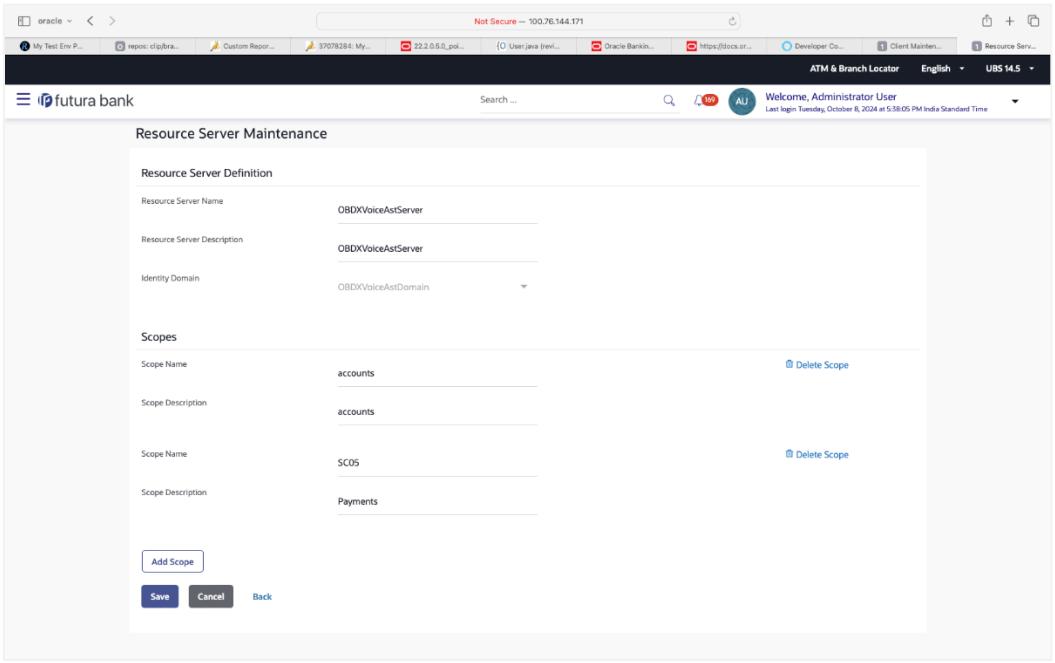




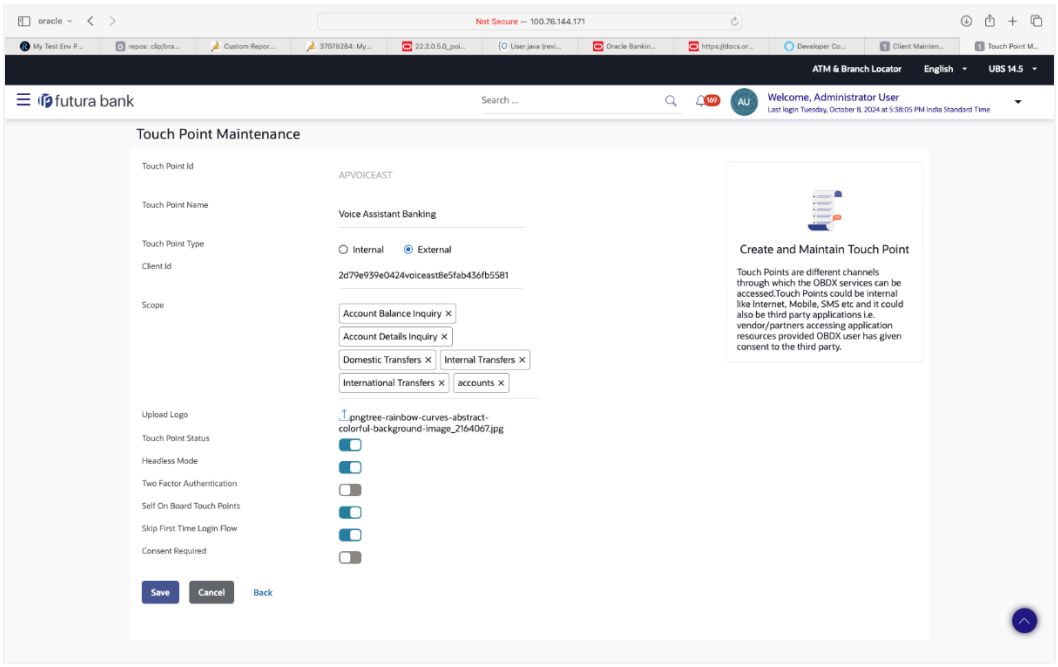
4. Set the client Id for client from client Maintenance page for “OBDXVoiceAstDomain” identity domain client.
5. Click Edit and set the client secret for the above client.



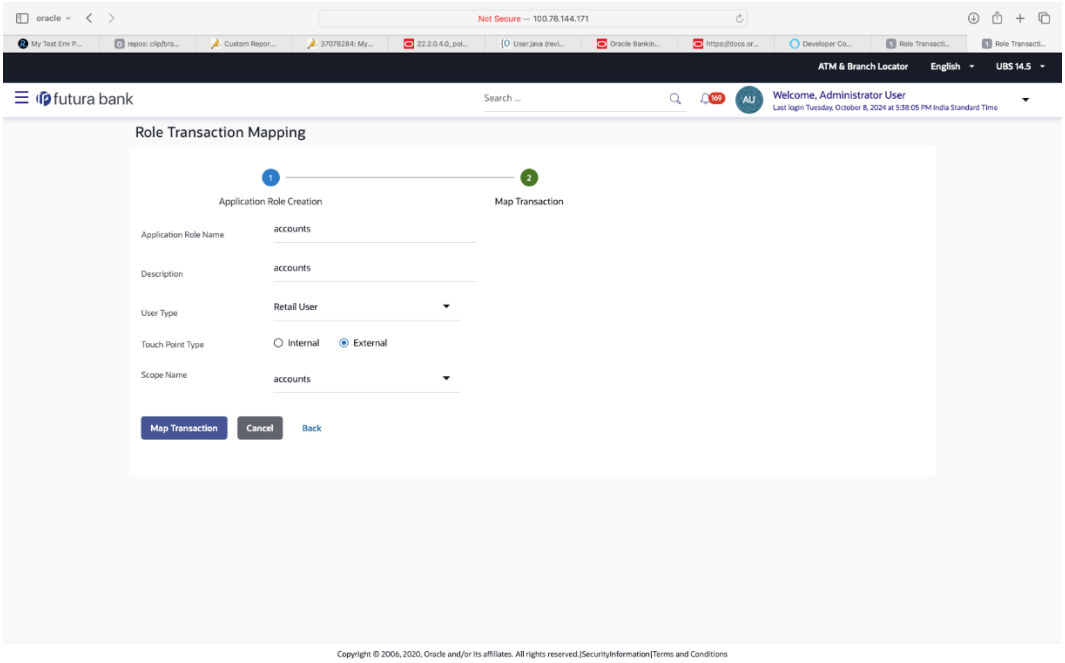
6. Go to Resource Server Maintenance page and select Identity domain to OBDXVoiceAstDomain.
7. Edit the Scope Name of SCO2 to “accounts” and Scope Description to “accounts”.



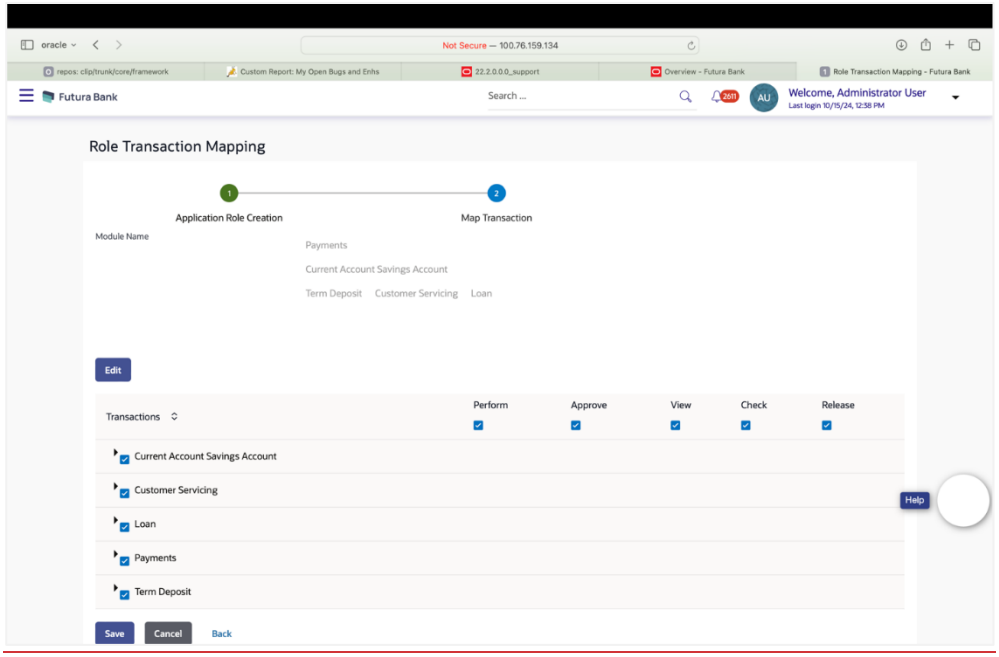
8. Go to Touch Point Maintenance Page and search for “Voice Assistant Banking” touch point name.
9. Add “accounts” scope to the list of scopes and add upload your bank logo.
10. Enable Touch point status.



11. Go to role transaction Mapping page and create an external user and add accounts scope.



12. Add module “current account savings account” , “term deposit” , “customer servicing” and “loan”,”payments”.



13. Set the 'CODE_CHALLENGE_FLAG' , 'OPAQUE_ACCESS_TOKEN_FLAG' flags to N in auth_config table.

    update auth_config set prop_value='N' where prop_id='CODE_CHALLENGE_FLAG';

    update auth_config set prop_value='N' where prop_id='OPAQUE_ACCESS_TOKEN_FLAG';

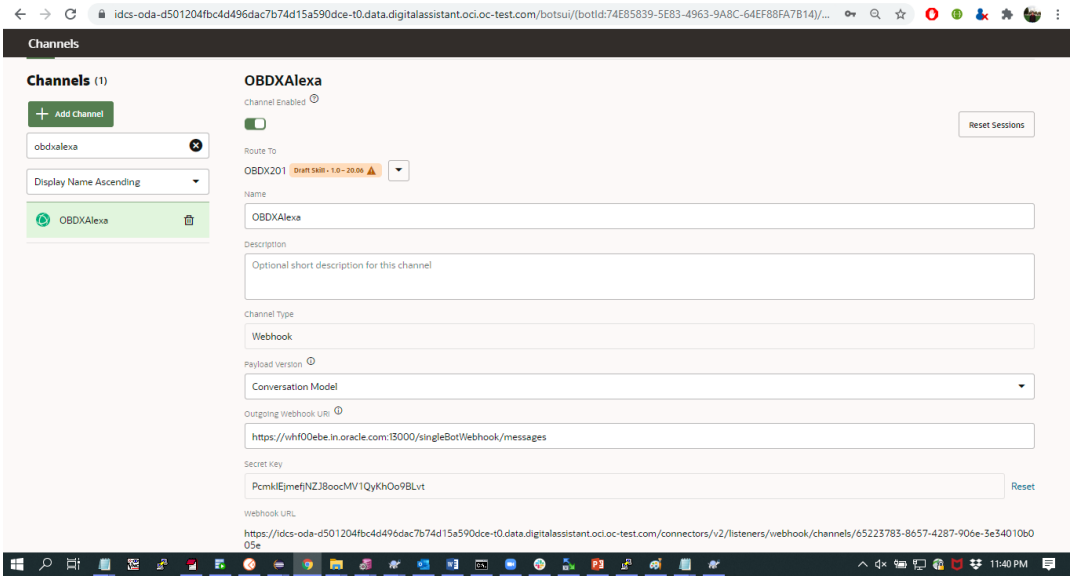
14. Update token_expiry in digx_au table for OBDXVoiceAstDomain domain_id

    update DIGX_AU_tokendetail set TOKEN_EXPIRY=600 where DOMAIN_ID='c733dee8-6e4f-4400-8170-cf7c6ef98165';

15. Restart the server.

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.



a. Update amzn_appId, channelSecretKey & channelUrl in service.js

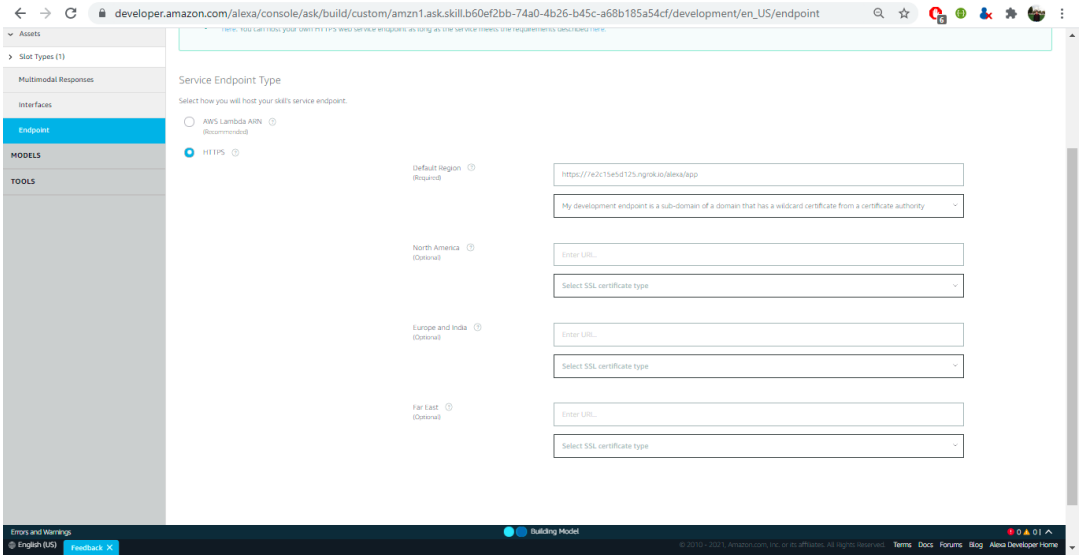
b. Run nodeJS script

c. npm install

d. node index.js

e. This must be publicly hosted in https url.

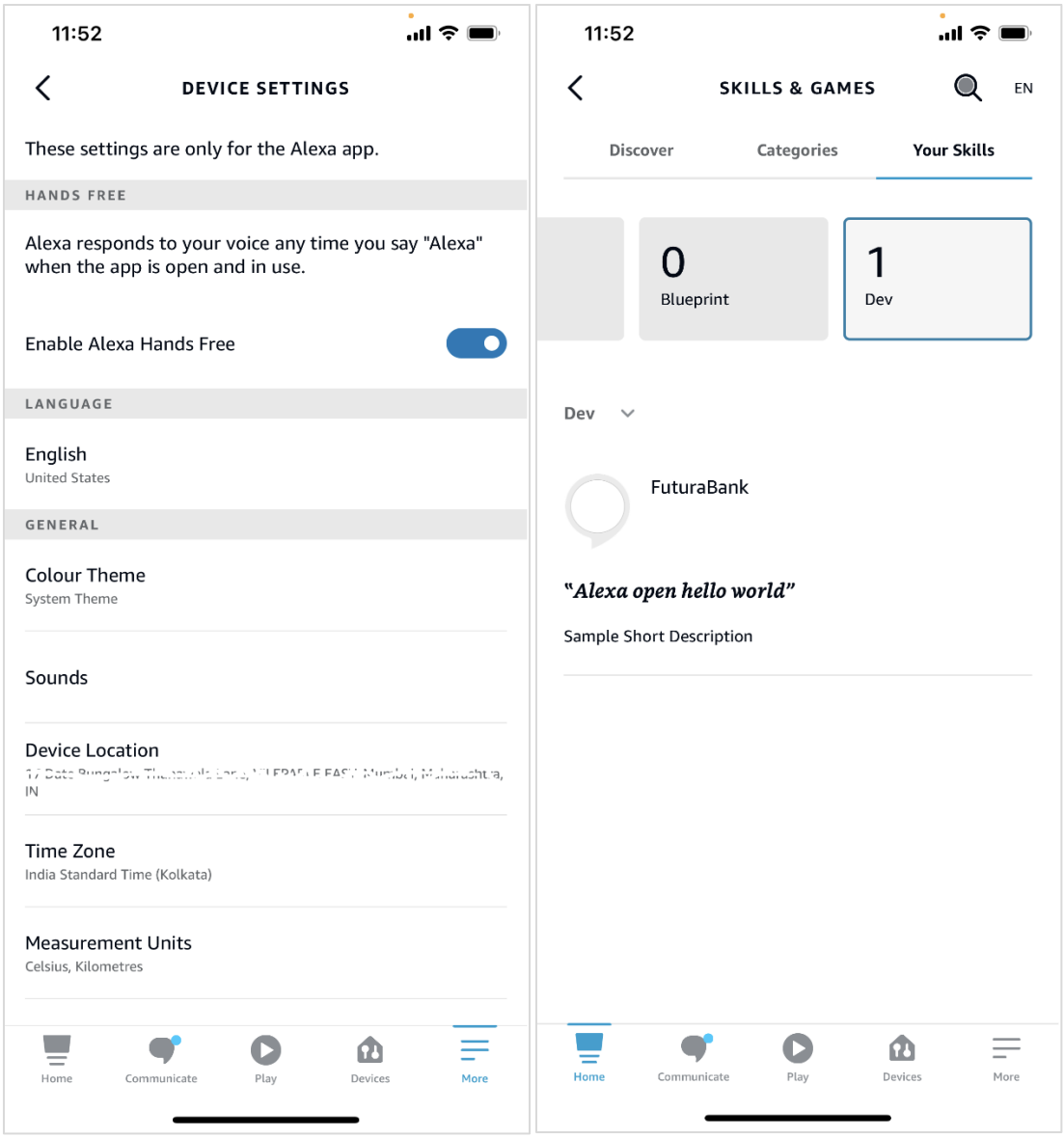
f. Enter this URL in below screen



2. In the Alexa Mobile App

a. Ensure that the skill is visible

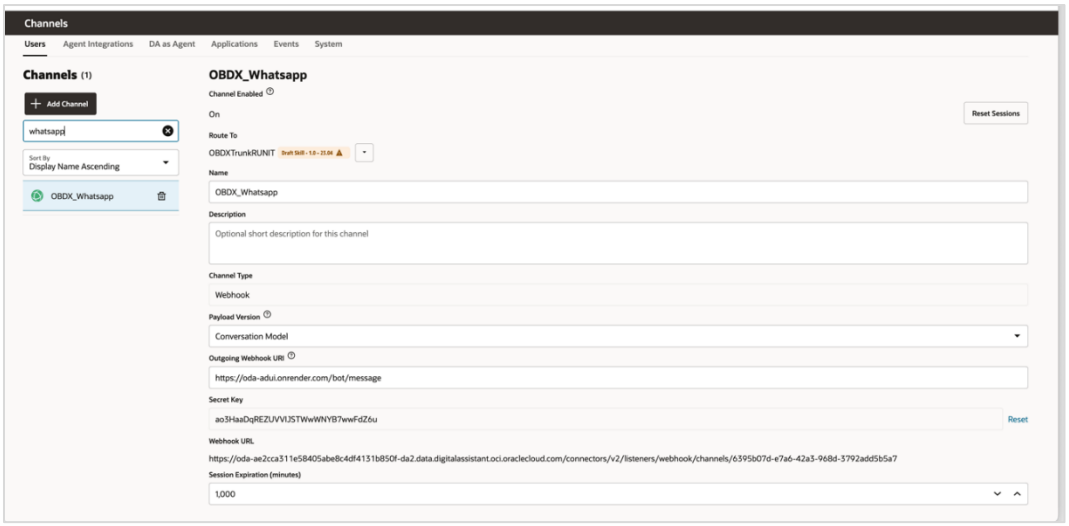
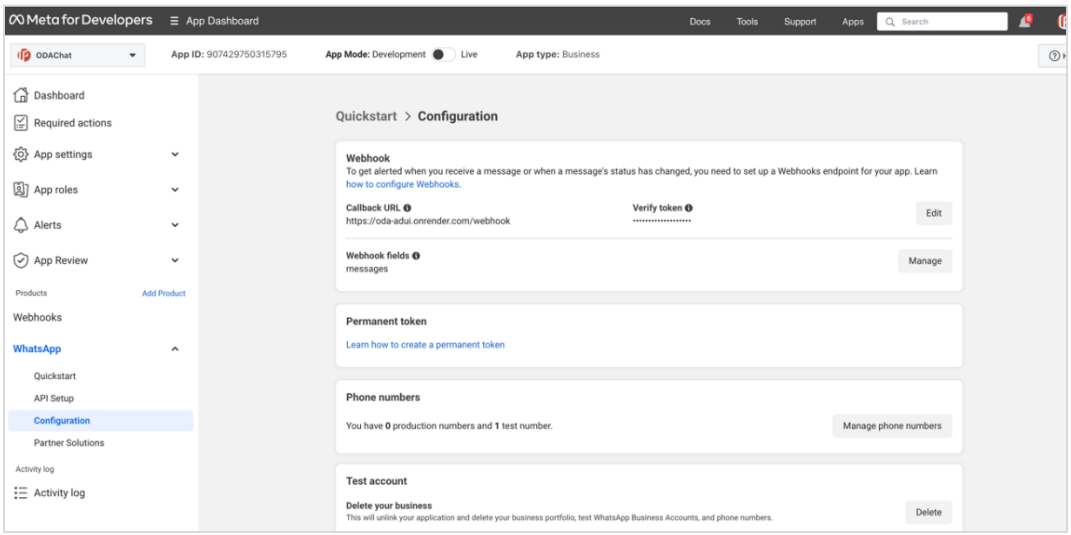
b. Change the language to English US



3. Link your amazon account for your skill through alexa app.

5.6 WhatsApp Channel

1. Create a channel of type Webhook.
2. Map the Skill to this channel & enable the same.



3. Obtain the NodeJS script from installer. This script resides between Whatsapp Server & ODA.
4. Complete the configurations as given in Sec 3.8 WhatsApp configurations of Alert Configuration Guide.
5. Note the Webhook URL & secret from above screen & update in NodeJS script.
6. Update the long term whatsapp token in MYTOKEN variable in the script.
7. Run the shared NodeJS script on any public server.
8. Update the url in below Whatsapp Console. The verify token is the one used in mytoken variable in script. Update the outgoing webhook url in ODA channel.