



## CHATBOT AUTHOR TRAINING

Create and publish two linked chatbots

### Abstract

This training is designed for anyone who is new to Df2020's Chatbot Author and would like an easy step by step starter guide to creating and publishing two linked chatbots

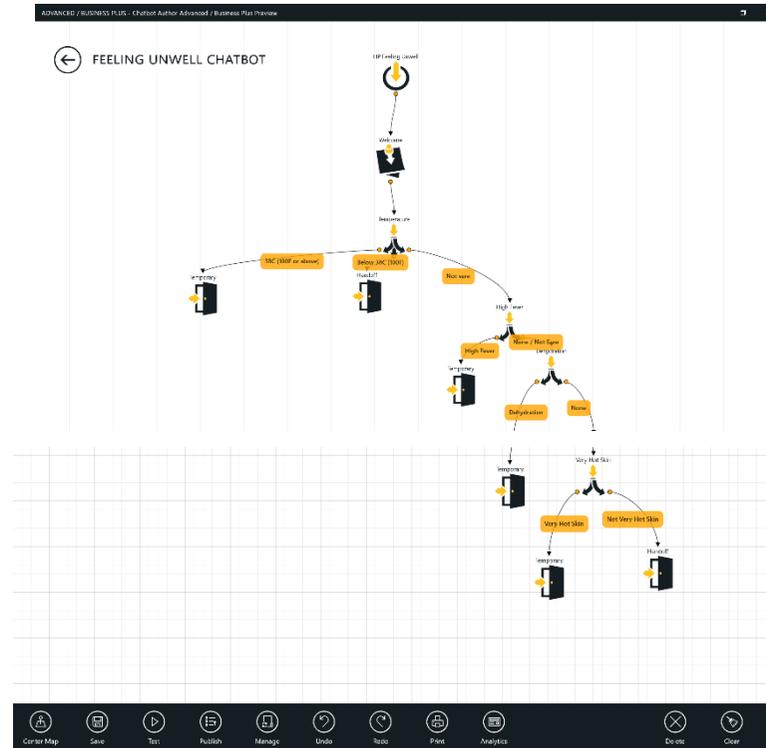
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<b>Training Exercise:</b>	Build Two Chatbots
<b>Target Audience:</b>	Professionals
<b>Target Product:</b>	Chatbot Author Advanced / Business Plus
<b>Training Duration:</b>	2 hours
<b>Prerequisites:</b>	Azure Botframework <a href="https://dev.botframework.com/">https://dev.botframework.com/</a>
<b>Objective:</b>	Create, publish and test two linked Chatbots
<b>Background:</b>	Key material sourced from a family doctor guide
<b>Purpose:</b>	Create two health advisory Chatbots, each with its own Knowledge Map.
<b>Chatbots</b>	1) Feeling Unwell 2) Fever

#### **Hints (some of these will make more sense during the exercise):**

1. Please save your Knowledge Map regularly as you build.
2. Use a word document like a scratch pad to prepare narrative as it helps develop your style of writing for conversation.
3. The maximum narrative per dialogue-step is 300 characters, which includes spaces. This enforces the knowledge to be broken down into manageable steps, with the expectation that the end-user can read, understand and move to the next step in 8 seconds.
4. Embellish the scripted narrative to make the interactions feel more like a human conversation.
5. Use meaningful Dialogue-Step Names for each Knowledge Map Symbol as this is used for the analytics.
6. Connect your Symbols as you create your Knowledge Map.
7. Don't cluster your symbols too closely on the canvas – drag and drop to evenly space them
8. You can only Link to a Chatbot that has been already published.
9. Use the video training guides within Chatbot Author.
10. End a Pathway in an Outcome which sets a knowledge boundary end-point.
11. Try and make Outcomes contextually meaningful.
12. For planning Links: use temp Outcomes to complete the Knowledge Map to enable Testing and Publishing. The temp Outcomes are replaced with Link Symbols.
13. Keep a separate log of the technical addresses and keys (Endpoint, App Id, App Password etc).

## EXAMPLE



See above screenshot of what the first 'Feeling Unwell Chatbot' should look like once the first part of the training is complete.

Fine more training support videos here - <http://www.chatbotauthor.ai/resources/>

Now lets get started!.....

## Feeling Unwell Chatbot

### Step 1

For the Start Symbol Properties suggest:

1. Title: xx Feeling Unwell where xx are your initials.
2. Dialogue-Script: Suggest keeping it very brief e.g. Guided advice for when you are feeling unwell
3. Chatbot Description: Suggest simply state Copyright xx as the Dialogue-Step narrative is a sufficient description. Xx – is your organisation name.
4. Author: your name

Please save (Horizontal menu, see three dots in the bottom right-hand corner)

### Step 2

Left click on the landscape to display the Wheel menu. Select a Note Symbol and complete a welcome dialogue. For example, the Properties content could be as follows:

1. Title: Welcome
2. Dialogue-Script: Sorry you are feeling unwell. Let's see if we can help you. Please take the next step.

Please submit and check the dialogue. If acceptable, please confirm otherwise improve the dialogue-step. Connect the Symbol dots. This process is repeated for every Symbol.

Please save and repeat on a frequent basis.

### Step 3

Setting the scene: the traditional advice relates to a temperature, whereby if it's 38C (100F) or above then the Chatbot needs to handover to the Fever Chatbot. However, what if someone does not have a thermometer. In this case there is a third option to consider. This is an important technique as not everything is binary. The third state (yes, no, not sure) is a good technique for considering instant upskilling.

Action: Next select a Choice Symbol with three Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: Temperature
2. Choice: Please select the option that describes your temperature.
3. Option 1: 38C (100F) or above
4. Option 2: Below 38C (100F)
5. Option 3: Not sure

#### Step 4 Option 1: 38C (100F) or above

Provide a temporary outcome. This will be replaced by a Link to the Fever Chatbot later.

#### Step 4 Option 2: Below 38C (100F)

Provide an Outcome to complete this pathway. Here are suggestions for the Properties, but do improve as you see fit:

Dialogue-Step Name: Handoff

Dialogue Script: Sorry we cannot help you now. Please go to <https://tinyurl.com/og8ngsb> for further advice.

#### Step 4 Option 3: Not sure

This step is the beginning of a flow of providing instant upskilling to determine whether a person has a potential high temperature. The knowledge has been obtained from another source. The sequence is based on a probability guesstimate due to the absence of evidential data. This sequence can be changed later as dialogue evidence emerges. Action: Next select a Choice Symbol with two Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: High Fever
2. Choice: Please check for a high fever, which might include signs of hallucination, confusion, irritability, convulsions or seizures.
3. Option 1: High Fever
4. Option 2: None / Not Sure

#### **Step 5 Option 1 High Fever**

Clone the Outcome from Step 4 Option 1: 38C (100F) or above

#### **Step 5 Option 2: None / Not Sure**

Action: Next select a Choice Symbol with two Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: Dehydration
2. Choice: Please check if there is or a feeling of dehydration, which means having a dry mouth or feeling thirsty. Sometimes, there is also a headache or a feeling of fatigue or the skin is dry or there is constipation.
3. Option 1: Dehydration
4. Option 2: None

#### **Step 6 Option 1: Dehydration**

Clone the Outcome from Step 4 Option 1: 38C (100F) or above

#### **Step 6 Option 2: None**

Action: Next select a Choice Symbol with two Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: Very Hot Skin
2. Choice: Please ask someone to touch the heat of your skin against another person. If it feels very, very hot in comparison it could be fever.
3. Option 1: Very Hot Skin
4. Option 2: Not Very Hot Skin

#### **Step 7 Option 1: Very Hot Skin**

Clone the Outcome from Step 6 Dehydration

#### **Step 7 Option 2: Not Very Hot Skin**

Clone the Outcome from Handoff (Step 4 Option 2: Below 38C (100F))

#### **TEST**

This Knowledge Map is now complete. Please perform a test and improve any dialogue as appropriate. If the Test does not commence it is probably because you have not joined all the dots or have a surplus symbol.

#### **PUBLISH**

It is important to follow these instructions in strict sequence as it involves frictionlessly linking with your Azure.

1. Setup a file note using the following structure:

- a. Chatbot Author File Name:
- b. Chatbot Author Messaging Endpoint:
- c. Azure Bot Framework App Id:
- d. Bot Framework App Password:
- e. WebChat Secret Keys:
  - i. X
  - ii. X
- f. Webchat Embedded Code:
2. Press Publish using bottom horizontal menu (three dots in bottom right hand corner).
3. Confirm you want to Publish.
4. Wait whilst your chatbot software is generated
5. Copy the Messaging Endpoint (also copy to your file note)
6. Click on the link to the Microsoft Bot Framework followed by sign-in.
7. Paste Messaging Endpoint to Configuration Messaging Endpoint
8. Upload custom icon (not today unless you have one available) – this is your brand
9. Complete the following fields and process:
  - a. Display Name
  - b. Bot Handle (tend to use initials of the Display Name plus a number)
  - a. Long Description: Guided advice for when you are feeling unwell
  - c. Click Create Microsoft App Id and Password
  - d. Copy App Id into Chatbot Author and File Note
  - e. Generate Password
  - f. Copy App Password into Chatbot Author and File Note
  - g. Press OK
  - h. Press finish and go back to botframework
  - i. Tick agree terms
  - j. Press Register
  - k. Bot created message appears

- l. Press OK
- m. Go to Chatbot Author and press Update
- n. Chatbot Created Successfully
- o. Press done within Chatbot Author
- p. Go to Botframework and press Migrate this Bot – red bar at the top
- q. Keep pay-as-you go
- r. Select area
- s. Press Migrate
- t. Agree to Terms of Service
- u. Open the new bot
- v. Go to Bot Management > Test in WebChat
10. Test your chatbot in webchat. Ensure you click on quit at the end of the pathway. Click 'start over' top right hand of the screen and try different user decision journeys.

### **ANALYTICS**

Go to Chatbot Author Analytics and view different reports of your user decision journey.

### **MAKE A CHANGE, REPUBLISH AND TEST**

Make a rememberable change to the knowledge map.

Press Publish

Go to Azure and test change through multiple user decision journeys.

Go to Chatbot Author Analytics and view different reports of your user decision journey using the latest version of your chatbots.

### **Fever Chatbot**

#### **Step 1**

For the Start Symbol Properties suggest:

1. Title: xx Fever where xx are your initials.

2. Dialogue-Script: Suggest keeping it very brief e.g. Guided advice for when you have a fever
3. Chatbot Description: Suggest simply state Copyright Pensions Advisory Service 2018 as the Dialogue-Step narrative is a sufficient description.
4. Author: your name

## Step 2

This set is a quality gate to ensure the person has a fever because this chatbot can be accessed directly. In addition, the advice is for those that are 12 years or older.

Action: Select a Choice Symbol with three Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Dialogue-Step Name: Fever?
2. Choice: Please confirm you have a fever
3. Option 1: No / Not Sure
4. Option 2: Yes for 12+ years
5. Option 3: Yes for <12 years

## Step 3 Option 1: No / Not Sure

Use the Link symbol and select your Feeling Unwell Chatbot.

NB Suggest in Dialogue-Step Name state Feeling Unwell

## Step 3 Option 3: Yes for under 12 years

Create an Outcome:

Dialogue-Step Name: Handoff

Dialogue Script: Sorry we cannot help you now. Please go to

<https://tinyurl.com/og8ngsb> for further advice.

## Step 3 Option 2: Yes for 12+ years

Next check if the person has a rash. Suggest:

Action: Select a Choice Symbol with two Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Dialogue-Step Name: Rash?
2. Choice: Do you have a rash?
3. Option 1: Yes
4. Option 2: No

## Step 4 Option 1: No

Repeat step 2 Option 1 – use the link symbol

## Step 4 Option 2: Yes

Let's check for Meningitis. This is another example of instant upskilling. Suggest:

Action: Select a Choice Symbol with two Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Dialogue-Step Name: Meningitis Check
2. Choice: A rash with a fever is usually caused by a viral infection. Sometimes the type of rash might indicate the possibility of Meningitis. Please find a clear drinking glass and press it on the spots and choose from one of the following options:
3. Option 1: Spots remain
4. Option 2: Spots fade

## Step 5 Option 1: Spots remain

Let's assume at this stage there is a risk that the user selects this option incorrectly.

Action: Select a Note Symbol. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: Confirm meningitis
2. Dialogue-Script: Please confirm the spots remain, as shown in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/l7w5u6q>

NB As the Note has a forward and backward movement it can be sometimes used for making a decision.

### **Step 6 Spots remain pathway**

Create an Outcome:

Dialogue-Step Name: Possible Meningitis

Dialogue Script: You have a fever and a rash which looks like meningitis. Please contact a doctor for advice.

### **Step 5 Option 2: Spots fade**

Let's assume at this stage there is a risk that the user selects this option incorrectly.

Action: Select a Note Symbol. Here are suggestions for the Properties, but do improve as you see fit:

1. Title: Confirm spots fade

2. Dialogue-Script: Please confirm the spots fade, as shown in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/kspncd6>

NB As the Note has a forward and backward movement it can be sometimes used for making a decision.

### **Step 6 Spots fade pathway**

Let's consider other types of rashes.

Action: Select a Choice Symbol with five Options. Here are suggestions for the Properties, but do improve as you see fit:

1. Dialogue-Step Name: Other Rashes
2. Choice: Please select the best option for your type of rash.
3. Option 1: Itchy and blistery
4. Option 2: Spreads from spot
5. Option 3: Affecting the bottom
6. Option 4: Pink spots
7. Option 5: None of these

### **Step 7 Option 1: Itchy and blistery**

Let's assume at this stage there is a risk that the user selects this option incorrectly. Use a note symbol.

1. Title: Confirm chickpox
2. Dialogue-Script: Please confirm the spots are like those in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/kgbo4nc>

### **Step 8 Suspect chickpox**

Create an Outcome:

Dialogue-Step Name: Possible chickpox

Dialogue Script: You have a fever and a rash which looks like chickpox. Please contact a doctor for advice.

**The subsequent steps are similar. Suggest use the copy function and make changes.**

### **Step 7 Option 2: Spreads from spot**

Let's assume at this stage there is a risk that the user selects this option incorrectly.

1. Dialogue-Step Name: Confirm lyme disease
2. Dialogue-Step: Please confirm the spots are like those in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/qxqus4s>

### **Step 8 Suspect lyme disease**

Create an Outcome:

Dialogue-Step Name: Possible lyme disease

Dialogue Script: You have a fever and a rash which looks like lyme disease. Please contact a doctor for advice.

### **Step 7 Option 3: Affecting the bottom**

Let's assume at this stage there is a risk that the user selects this option incorrectly.

1. Dialogue-Step Name: Confirm parvovirus
2. Dialogue-Step: Please confirm the spots are like those in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/ol3qb5k>

### **Step 8 Suspect parvovirus**

Create an Outcome:

Dialogue-Step Name: Possible Parvovirus

Dialogue Script: You have a fever and a rash which looks like Parvovirus. Please contact a doctor for advice.

### **Step 7 Option 4: Pink spots**

Let's assume at this stage there is a risk that the user selects this option incorrectly.

1. Dialogue-Step Name: Confirm rubella
2. Dialogue-Step: Please confirm the spots are like those in the picture, otherwise return to the previous step.
3. Add picture: <http://tinyurl.com/ovlgk9>

### **Step 8 Suspect rubella**

Create an Outcome:

Dialogue-Step Name: Possible Rubella

Dialogue Script: You have a fever and a rash which looks like Rubella. Please contact a doctor for advice.

### **Step 7: Option 5 None of these**

Create an Outcome:

Dialogue-Step Name: Rash Unknown

Dialogue Script: You have a fever and a rash. The rash does not seem to be meningitis, chickenpox, lyme disease, parvovirus or rubella. Please contact a doctor for advice.

### **Subsequent steps: test, publish, test and analytics**

The Knowledge Map is now complete. This can be confirmed through the Test facility. Once testing is complete follow the same procedures as before for publishing the chatbot. Again, be careful to follow the steps in a strict sequence.

### **Feeling Unwell – the final stage**

Return to the Feeling Unwell Map and replace the temporary outcomes with the Links to Fever.

Once completed perform the test, which ensures the Knowledge Map is complete in terms of connections.

Press Publish for Feeling Unwell.

Go to your Botframework and conduct final testing of your completed knowledge maps.