Action Bot

- Answer data related questions

- Perform Record Actions OOTB

- Perform Related Actions OOTB

- Function calls with customizations*

- Packaged in ChatGPT Data Bot BB on Canvas and App Market

- < 30 min set up

Appian Assistant

Use this AI Powered chatbot to quickly retrieve information from this application. Try asking about data or to take action.

Ask me a question or tell me what to do

SEND

appian

Action Bot

- Automated logic

- Work from a single interface

- Save time navigating application
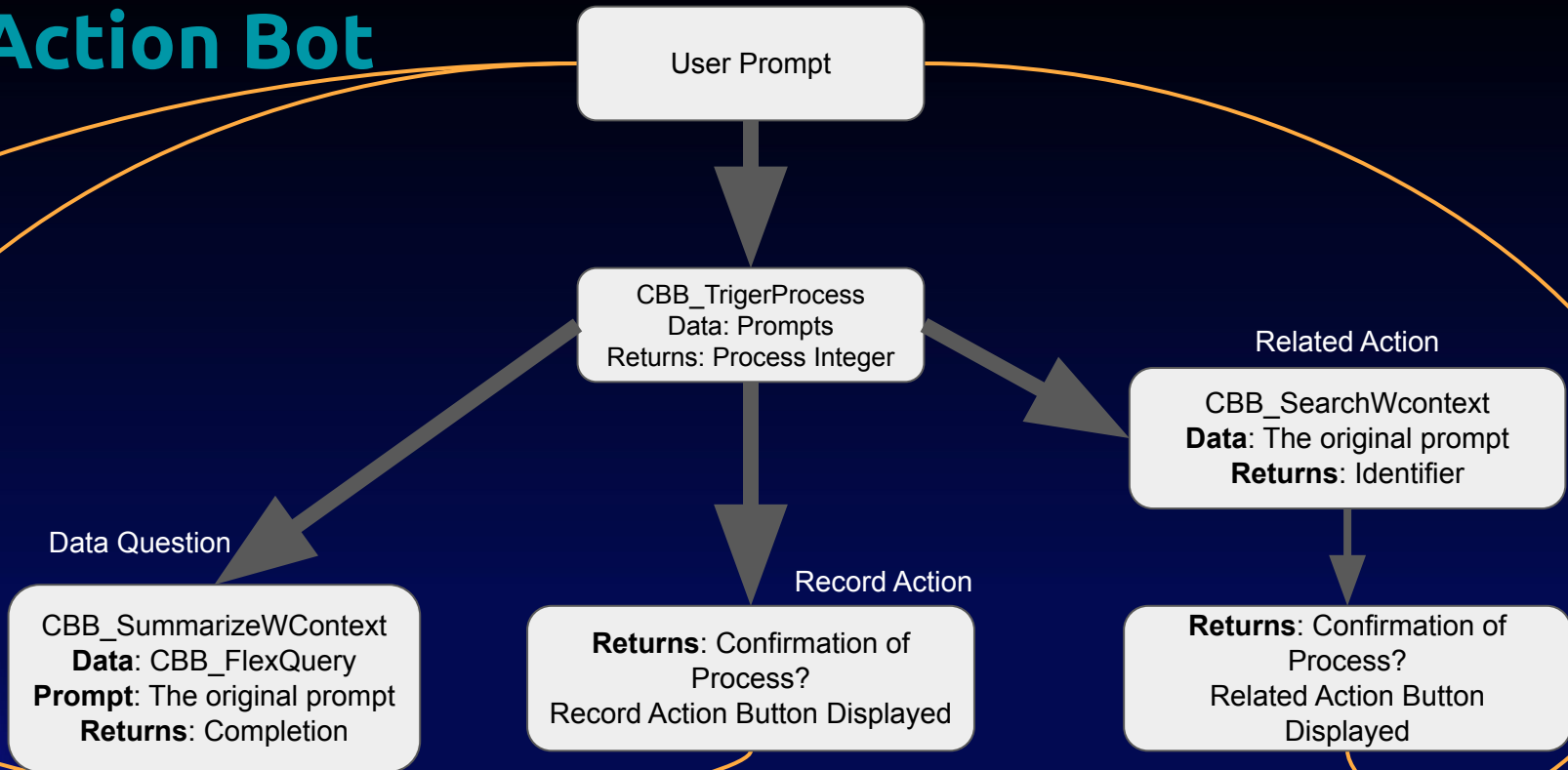
- Extend to whatever you want

Appian Assistant

Use this AI Powered chatbot to quickly retrieve information from this application. Try asking about data or to take action.

Ask me a question or tell me what to do

SEND

appian

Action Bot

```
                          ┌─────────────────┐
                          │   User Prompt   │
                          └─────────────────┘
                                   │
                                   ▼
                    ┌──────────────────────────────┐
                    │      CBB_TrigerProcess        │
                    │      Data: Prompts            │
                    │      Returns: Process Integer │
                    └──────────────────────────────┘
```

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Action Bot

User Prompt

↓

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Integration Prompt - Function Call

Train yourself to recognize keywords in a user's prompt and respond appropriately. The bot should identify specific keywords or phrases in the user's input and select the corresponding response based on the following dataset. Only respond with the specified processId of the data:

& ri!data &

If you do not find any accurate matches, return the number 911. If the users prompt is asking a question or contains a ? then return the number 911. Your response should be only a number value and contain no text. Here is your prompt:

appian

Prompt Data

↑	Id	Prompt	Response
	1	Create an event	1
	2	Send an alert	2
	3	Create absence	3
	4	Create an employee	4
	5	update employee	5
	6	Update event	6
	7	Update alert	7
	8	Update operation	8
	9	Update location	9

9 items

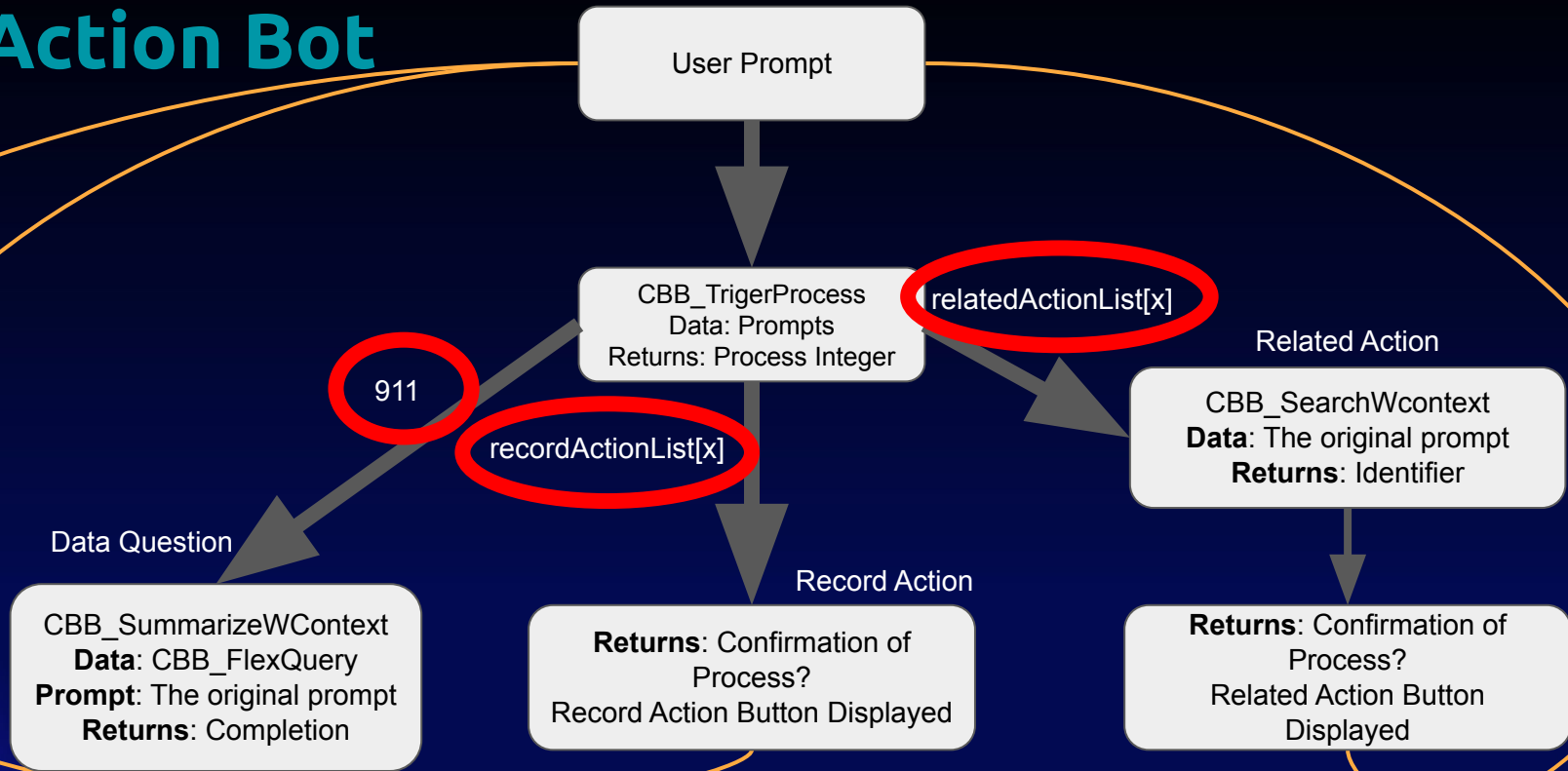# Conversation Saving

Local Variable - a!map()

Now
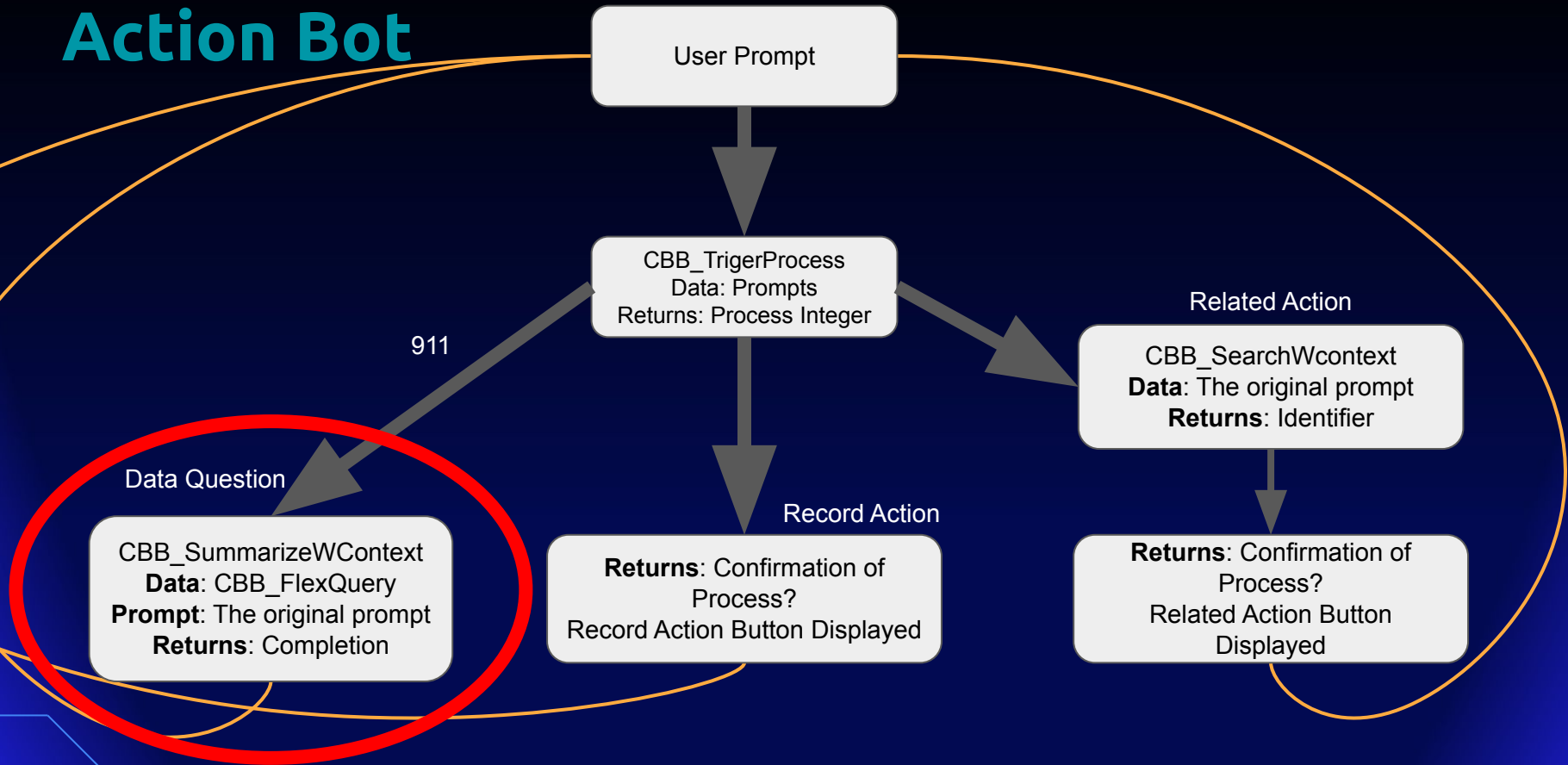- Id
- Prompt
- recordAction?
- relatedAction?
- dataTrigger?

Later
- cantFind?
- relatedActionIdentifier
- recordActionItem
- Response
- Completion

appian

Action Bot

User Prompt

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

911

recordActionList[x]

relatedActionList[x]

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Action Bot

User Prompt

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

911

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Related Action

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Integration Prompt - Summarize

Assistant is an intelligent chatbot designed to help users answer their data related questions.

Instructions:

- Read the dataset provided: & ri!data &
- Answer the question from the user
- If you're unsure of an answer, say that
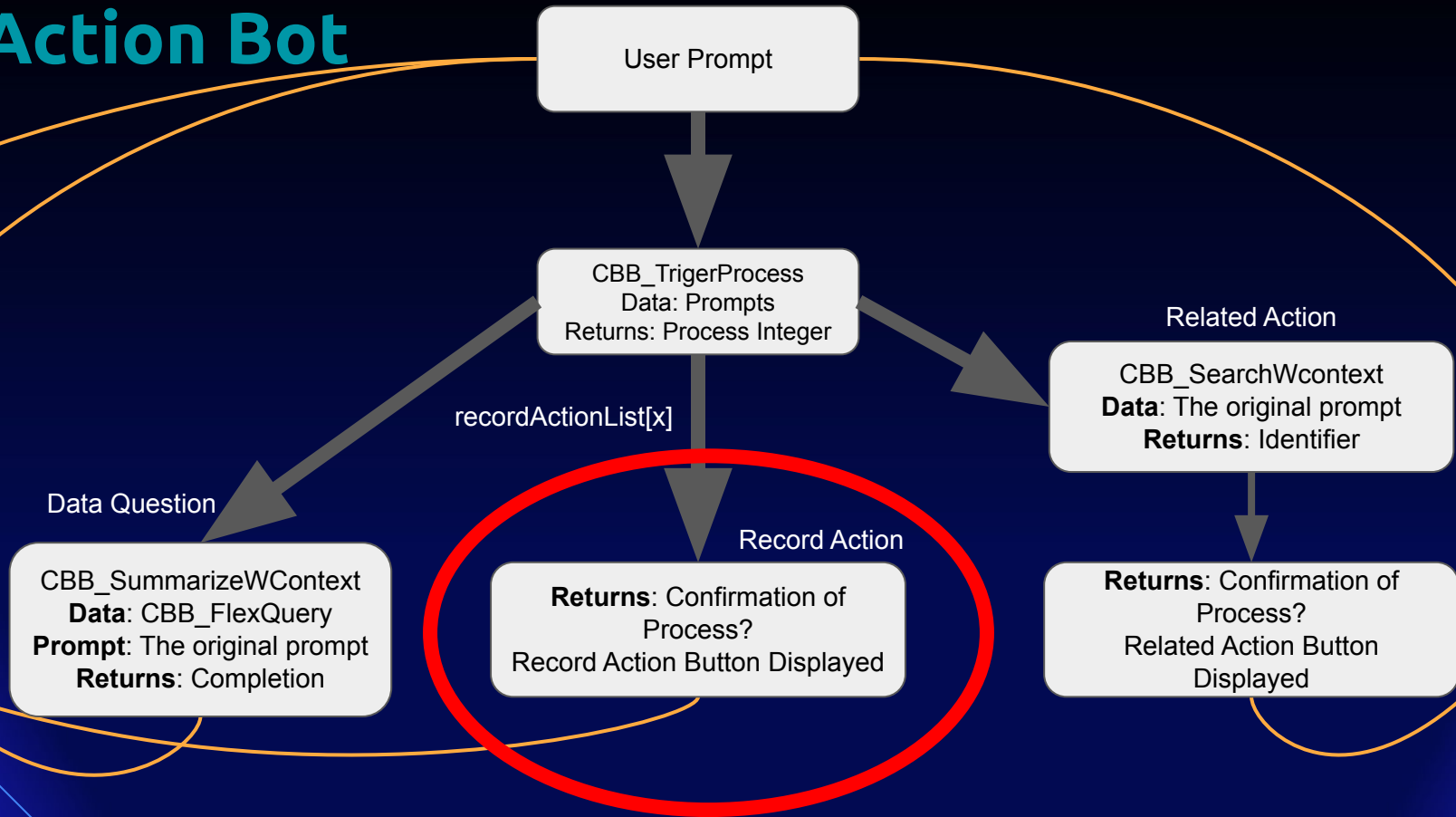
appian

Data

Anything - just use the parameters
defined in rule input

RecordType, Fields & Relationships,
Filters, Batchsize

Saves response to conversation local
variable


```
</> CBB_flexQuery

1  tostring(
2    a!queryRecordType(
3      recordType: ri!recordType,
4      fields: ri!fields,
5      filters: a!queryLogicalExpression(
6        operator: "AND",
7        filters: {
8          if(a!isNullOrEmpty(ri!filters),
9          {},
10         ri!filters)
11       },
12       ignoreFiltersWithEmptyValues: true,
13     ),
14     pagingInfo: a!pagingInfo(
15       startIndex: 1,
16       batchSize: a!defaultValue(
17         value: ri!batchSize,
18         default: 100
19       )
20     )
21   ).data
22 )
```

Action Bot

User Prompt

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

recordActionList[x]

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

Conversation Saving

Record action list from rule input

recordActionList [response]

[3]	[id:3,prompt:Create a new event...
id	3
prompt	Create a new event
response	1
recordAction	true
relatedAction	false
dataTrigger	false
relatedActionPrompt	null
cantFind	false
showRelatedActionButt...	false
relatedActionIdentifier	null
recordActionItem	*FieldLayout* ←

appian

Action Bot

```
                          ┌─────────────────┐
                          │   User Prompt   │
                          └─────────────────┘
                                   │
                                   ▼
                    ┌──────────────────────────┐
                    │    CBB_TrigerProcess      │  relatedActionList[x]
                    │    Data: Prompts          │ ──────────────┐
                    │    Returns: Process Integer│              │
                    └──────────────────────────┘               │
```

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

relatedActionList[x]

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Data Question

Record Action

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Integration Prompt - Search

The user is looking to take action on a data object. Your job is to return the ID field for the object they are referring to in the following dataset:"

& ri!data &

Use clues in the users prompt to help you identify the appropriate ID field. Look for matching values in the dataset based on the prompt. You are very good at your job and when you cannot find a good match in the data set - you return the number 911. You are being used to help speed up a user searching through a dataset. Only do your job and do not say you can't perform the task. NEVER INCLUDE ANY TEXT IN YOUR RESPONSE! ONLY RETURN THE ID FIELD INTEGER VALUE! If there are multiple values, ONLY RETURN THE FIRST ONE IN THE LIST! Please only return the ID field and nothing else in your response. Here is your prompt:
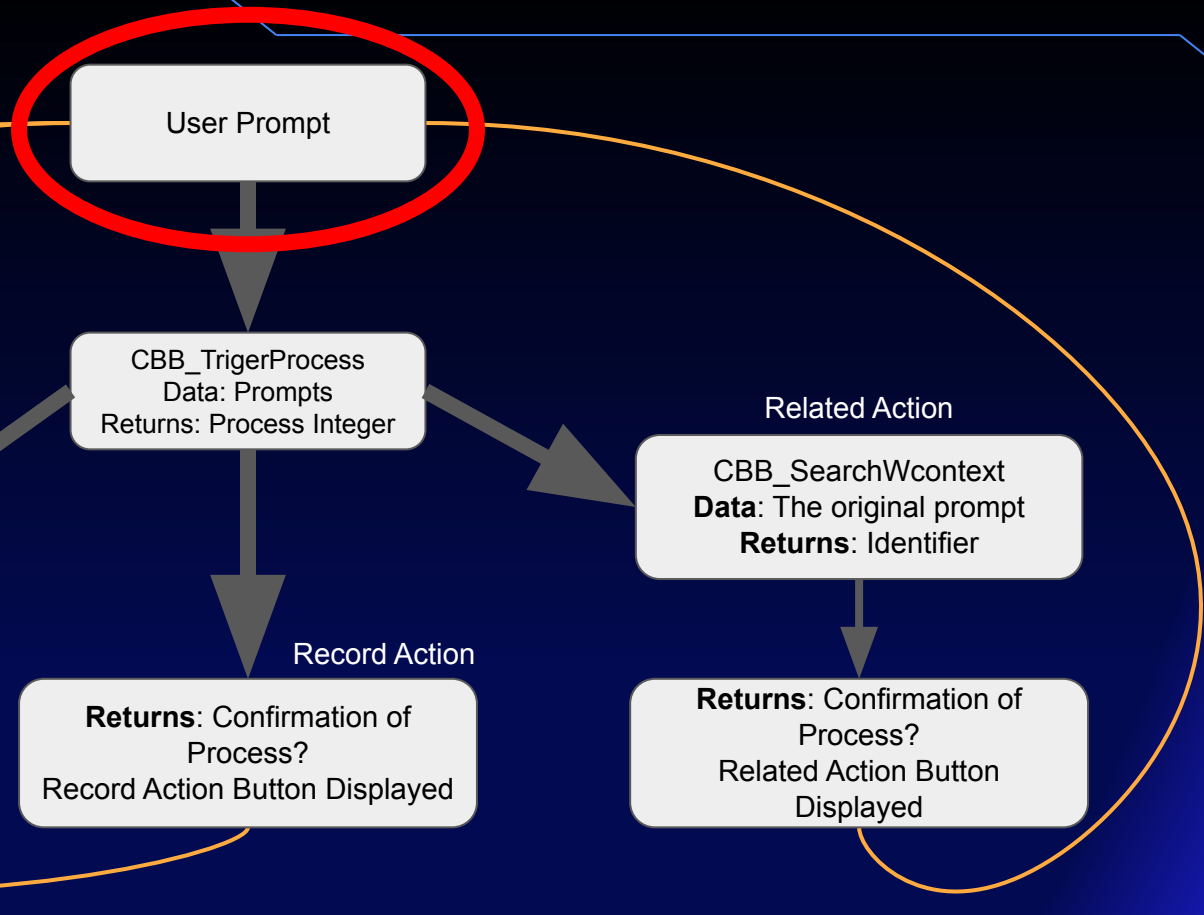
& ri!prompt

appian

Data

Anything - just use the parameters defined in rule input for relatedActionData.

Saves identifier to conversation local variable.

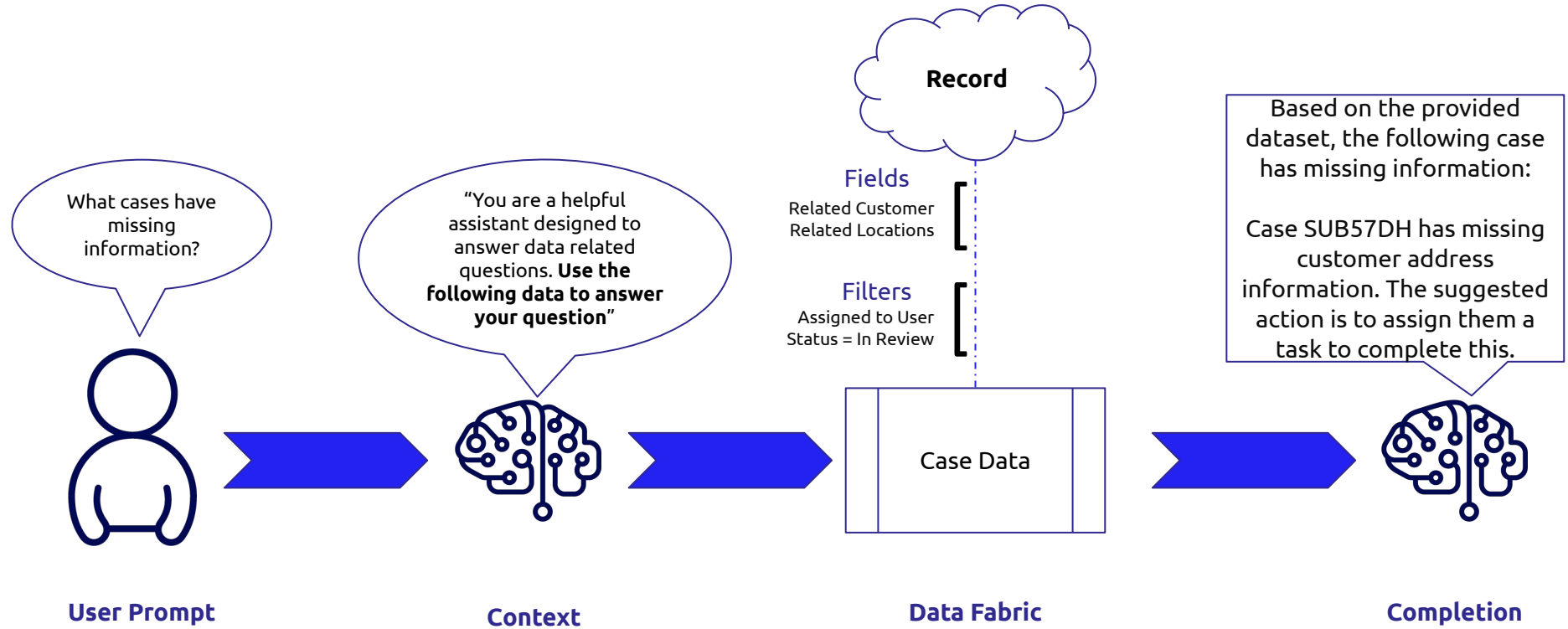Combines with Related Actions in rule input to display button - null safe if unconfident


```
CBB_flexQuery

1  tostring(
2    a!queryRecordType(
3      recordType: ri!recordType,
4      fields: ri!fields,
5      filters: a!queryLogicalExpression(
6        operator: "AND",
7        filters: {
8          if(a!isNullOrEmpty(ri!filters),
9          {},
10         ri!filters)
11       },
12       ignoreFiltersWithEmptyValues: true,
13     ),
14     pagingInfo: a!pagingInfo(
15       startIndex: 1,
16       batchSize: a!defaultValue(
17         value: ri!batchSize,
18         default: 100
19       )
20     )
21   ).data
22 )
```
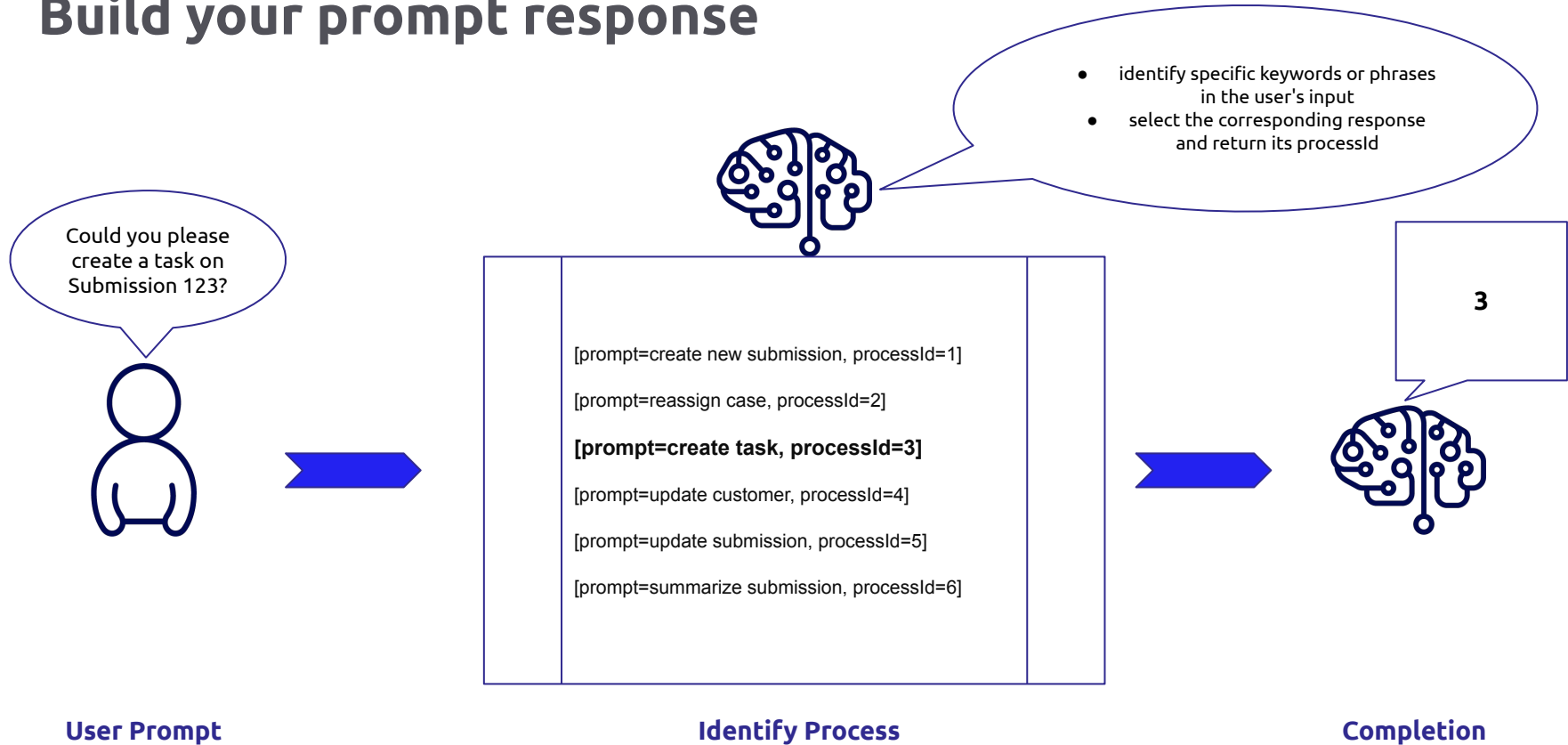
appian

Action Bot

User Prompt

↓

CBB_TrigerProcess
Data: Prompts
Returns: Process Integer

Related Action

CBB_SearchWcontext
Data: The original prompt
Returns: Identifier

Data Question

CBB_SummarizeWContext
Data: CBB_FlexQuery
Prompt: The original prompt
Returns: Completion

Record Action

Returns: Confirmation of Process?
Record Action Button Displayed

Returns: Confirmation of Process?
Related Action Button Displayed

appian

Appendix

Augment with Appian Record Data

What cases have missing information?

"You are a helpful assistant designed to answer data related questions. **Use the following data to answer your question**"

Record

Fields
Related Customer
Related Locations

Filters
Assigned to User
Status = In Review

Case Data

Based on the provided dataset, the following case has missing information:

Case SUB57DH has missing customer address information. The suggested action is to assign them a task to complete this.

User Prompt

Context

Data Fabric

Completion

appian

Build your prompt response

identify specific keywords or phrases in the user's input
select the corresponding response and return its processId

Could you please create a task on Submission 123?

[prompt=create new submission, processId=1]

[prompt=reassign case, processId=2]

[prompt=create task, processId=3]

[prompt=update customer, processId=4]

[prompt=update submission, processId=5]

[prompt=summarize submission, processId=6]

3

User Prompt

Identify Process

Completion

appian

Configure Actions

Completion

Action Designation

```
┌─────────┐
│         │
│    3    │
│         │
└──┐──────┘
```

Data Question ----- **Completion**

Configuration Logic

Record Action ----- **+ NEW SUBMISSION**
Display Action

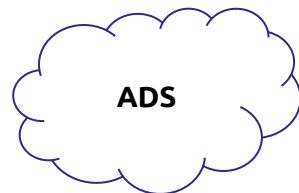**Related Action** ——— **Search for Record**

Custom

appian

Search for Record

The user is looking to take action on a data object. Your job is to return the ID field for the object they are referring to.
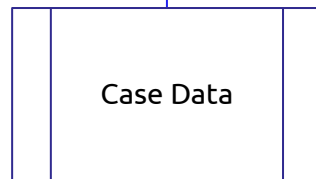
ADS
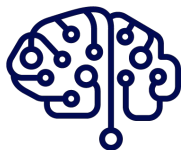
Fields
Case Name
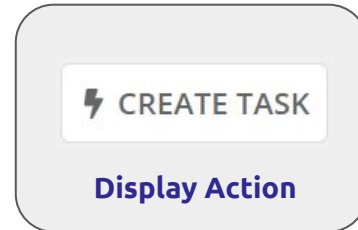Case Id

Filters
Assigned to User
Cases not Closed

Case Data

⚡ CREATE TASK

Display Action

Search

Data Fabric

Completion

Original Prompt:

Could you please create a task on **Submission 123**?

We know to "create task" and that we should be looking for "submissions"

appian

Configure Actions

Completion

Action Designation

3

Configuration Logic

Data Question

Completion

Record Action

+ NEW SUBMISSION

Display Action

Related Action

⚡ CREATE TASK

Display Action

Custom

appian