Cloud Pak for Business Automation Tech Jam – Sept 16-17, 2021

Bu Feng Hou
Zhong Tao Gao
Ke Feng Shao

Business Automation SWAT

IBM

Agenda

- Who, why and what
- Jam Agenda
- Logistics
- Cloud Pak for Business Automation
- Scenario

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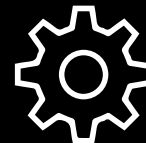- Scenario

Who, Why, What

Who

- Who are we?
  - Automation Elite (SWAT)
  - World-wide team
  - Part of product team
  - Cover all of CP4BA

- Who's this Jam for?
  - Foundation audience
  - Solution implementors
  - Administrators/DevOps

Why

- Learn & enable
- Share experiences
- Get connected

What

- Hear-out the CP4BA strategy
- Experience CP4BA hands-on

Agenda

- Who, why and what
- **Jam Agenda**
- Logistics
- Cloud Pak for Business Automation
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Jam Agenda – GCG

		WebEx: https://ibm.webex.com/meet/houbf	

Day 1	AM	• 09:30 Tech Jam Welcome & Introduction • 11:00 Choose & provision scenario	• 10:00 [Bu Feng Hou] Client Onboarding Scenario Introduction & Demo
	PM	• 13:30 Continue Scenario Implementation • 17:00 Day-1 Closing	
Day 2	AM	• 09:30 Day-2 Opening • 09:45 Continue scenario implementation	• 10:30 [Zhong Tao Gao] How to Deploy CP4BA on OpenShift hosting on IBM Cloud
	PM	• 13:30 Continue Scenario Implementation • 15:30 Tech Jam Feedback & Closing • Survey: https://www.surveymonkey.com/r/CP4BATechJam2021	

IBM Cloud Pak for Business Automation

General Practitioner
Foundational

IBM Process Mining

IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Business Automation Workflow

IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Filenet Content Manager

IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Robotic Process Automation

IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Automation Decision Services Tech Jam

IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Business Automation Application

IBM Cloud Pak for Business Automation Practitioner
Foundational

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Logistics

Dates
GCG: Thursday Sept 16 to Friday Sept 17 [9:30am – 5:00pm GMT+8:00h]

Logistics	Participants	Technical Team

Logistics

Hosts:
- **APAC:** **Bu Feng Hou, Zhong Tao Gao, Ke Feng Shao**

WebEx:
- **APAC:** **https://ibm.webex.com/join/houbf**

- **Instructions**:
  - Bring your own laptop
  - (optional) Tablet / secondary screen

Participants

- Participants: 75
-

Technical Team

APAC
GMT+8:00h

- Zhong Tao Gao(CP4BA, BAA, Process Mining)
- Ke Feng Shao(Content, Workflow, BAI/BPC)
- Bu Feng Hou(CP4BA, RPA, Process Mining)

- **Communication - Slack:**
  - One **#cp4ba-tech-jam-main-lobby** and several per topic channels **#cp4ba-tech-jam-XXXX** created
  - Should have received an email from **Slack** titled: *Tom Al-Hamwy has invited you to join a Slack workspace*
  - Follow the instructions in the email to register & gain access to the slack channels

- **Material - GitHub**
  - One stop for all material accessible across IBM
    - **https://github.com/IBM/cp4ba-tech-jam**

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The IBM hybrid cloud software approach

Deliver software for specific use cases or personas in Cloud Paks or cloud standalone

Solutions, products and applications

Unify and simplify software experiences with seamless integration of related capabilities

Cloud Paks

Enable software to run anywhere, on any cloud, as agile cloud-native services

Red Hat OpenShift **Hybrid cloud platform**
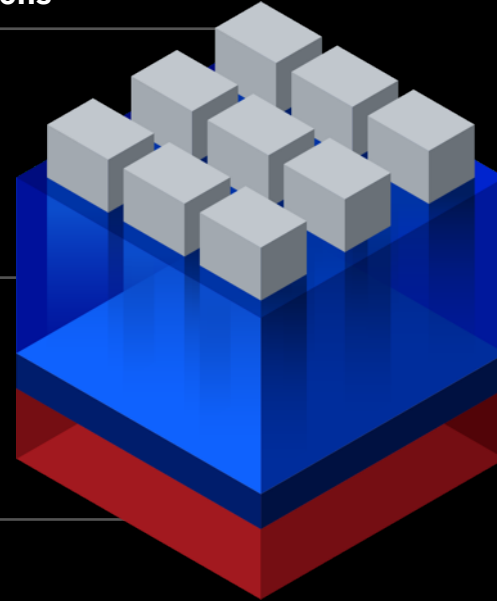
Watson

Infuse AI for business throughout our software

IBM Automation platform
The most complete set of business and IT Automation services, powered by AI

Use cases

Customer experience	App and infrastructure stability	Hybrid cloud integration	Site deployment automation
Business operations	Platform operations	Real-time analytics	4G/5G telco cloud platform
Workforce management	Optimize AIOps	Transactional integrity	NFV lifecycle management

IBM Cloud Paks

IBM Cloud Pak for **Business Automation**	IBM Cloud Pak for **Watson AIOps**	IBM Cloud Pak for **Integration**	IBM Cloud Pak for **Network Automation**
− Workflow and decisions	− Application impact avoidance	− Application integration	− Intent-driven orchestration
− Content services	− Hybrid application management	− API management	− Closed-loop operations
− Operational intelligence	− Observability INSTANA	− Messaging and events	− Network optimization

Automation foundation

− Robotic Process Automation	− Process and task mining	− Natural language interactions	− Machine learning	− Event detection	− 3rd Party integrations	− Operational models

Red Hat OpenShift

IBM Cloud AWS Microsoft Azure Google Cloud VMware Private IBM **Z** IBM **LinuxOne** IBM **Power** Systems End points

IBM Cloud Pak for Business Automation

AI-Powered/Intelligent Automation

Low-code applications

Automation accelerators

Process mining and modeling

RPA and digital labor

Operational intelligence

Core automation

Document processing

Workflow

Decision management

Content services

AI and machine learning

Automation foundation

– Robotic Process Automation

– Process and task mining

– Natural language interactions

– Machine learning

– Event detection

– 3rd Party integrations

– Operational models

Red Hat OpenShift

IBM Cloud

AWS

Microsoft Azure

Google Cloud

VMware

Private

IBM **Z**
IBM **LinuxOne**
IBM **Power** Systems

End points

IBM Cloud Pak for Integration

Client and partner applications

Shared asset repository

API management

Application integration

End-to-end security

Enterprise messaging

Event streaming

High speed data transfer

Unified governance framework

AI and machine learning

Automation foundation

– Robotic Process Automation
– Process and task mining
– Natural language interactions
– Machine learning
– Event detection
– 3rd Party integrations
– Operational models

Red Hat OpenShift

IBM Cloud   AWS   Microsoft Azure   Google Cloud   VMware   Private   IBM **Z** IBM **LinuxOne** IBM **Power** Systems   End points
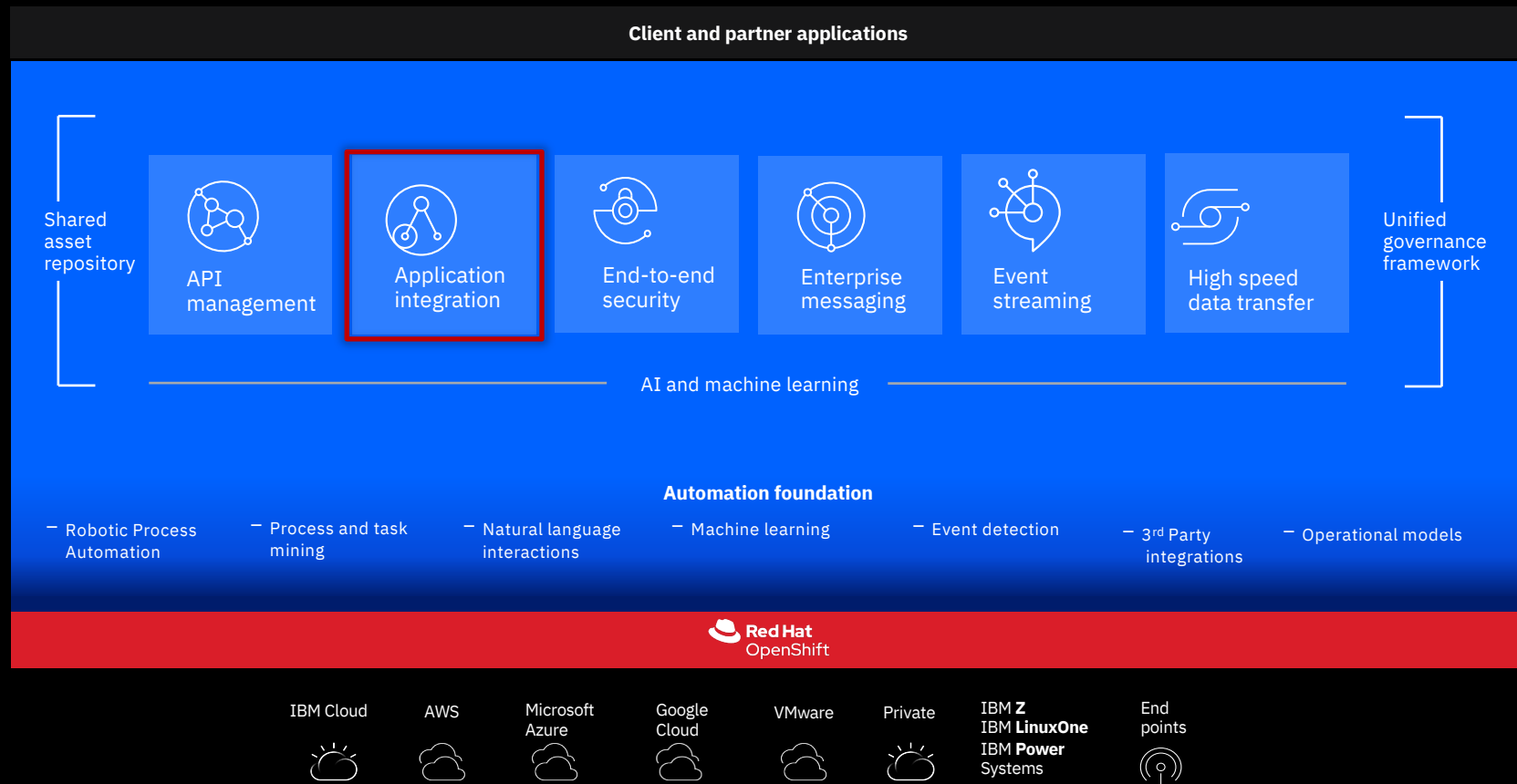
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Intelligent Client Onboarding Scenario – Introduction
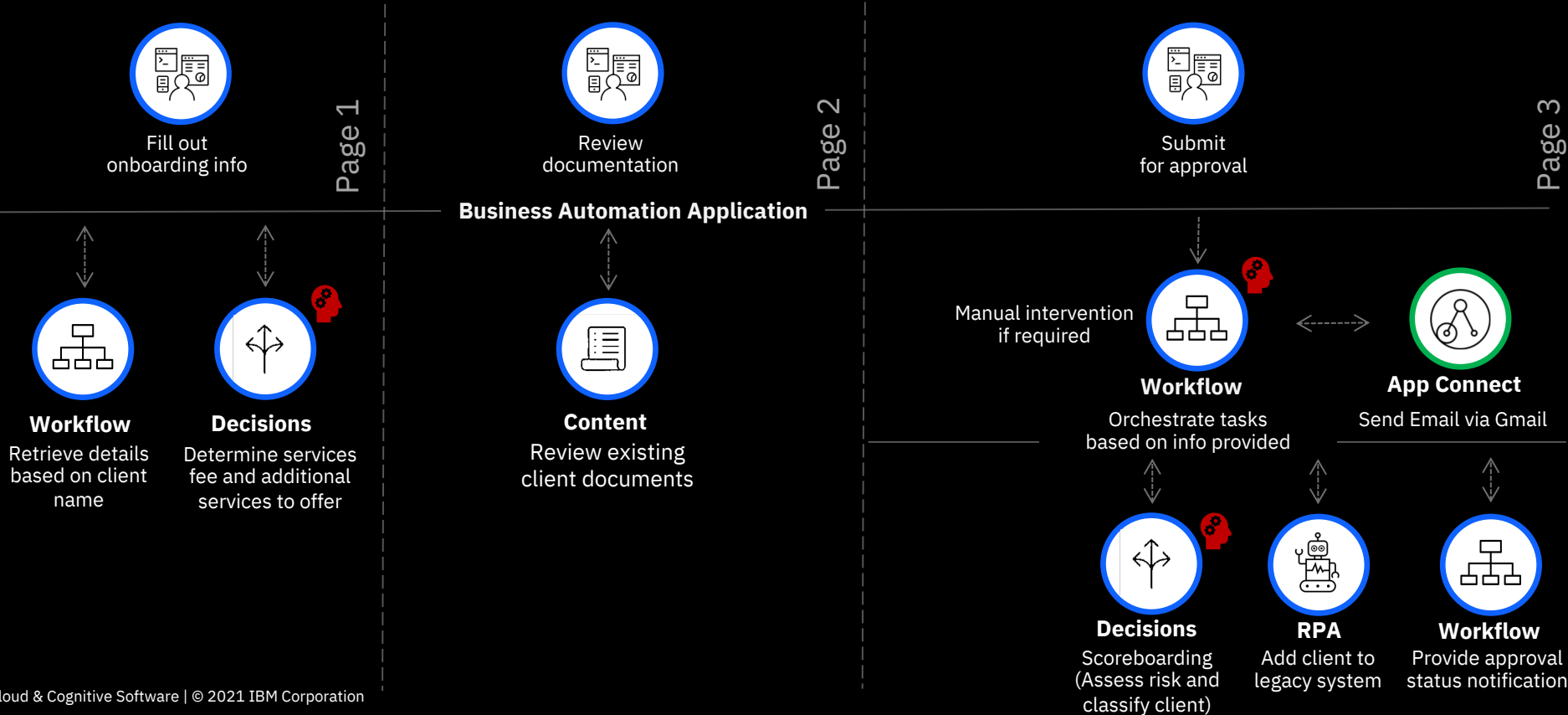## IBM Automation platform

- Client Onboarding solution as part of Focus Corp's business as a service provider

- Focus Corp offers various services for different industries

- Showcases a combination of capabilities from the IBM Automation platform to digitize all aspects of the business

- Assets are used for enablement (Tech Jams), POCs, testing, sales and customer demos

- Features

  o A fully automated use-case and one requiring a knowledge worker

  o Usage of AI-Powered and Intelligent Automation

Focus Corp

Fibre Internet
Corporate Credit Card
Merchandise Insurance
Communication Equipment
Infrastructure Consultation
Telecom
Healthcare
Insurance
Finance
Federal
Green Technology Equipment
Mental Health Care
Medical Insurance
Tax Consultation
External Audit
Tieline Solution
Education Funding
Employee Benefits Plan
Onsite Medical Testing
Virtual Medical Assistance
Transport Security
Warehouse Insurance
Business Devices
Fraud Protection
Loan Insurance

Intelligent Client Onboarding Scenario Flow
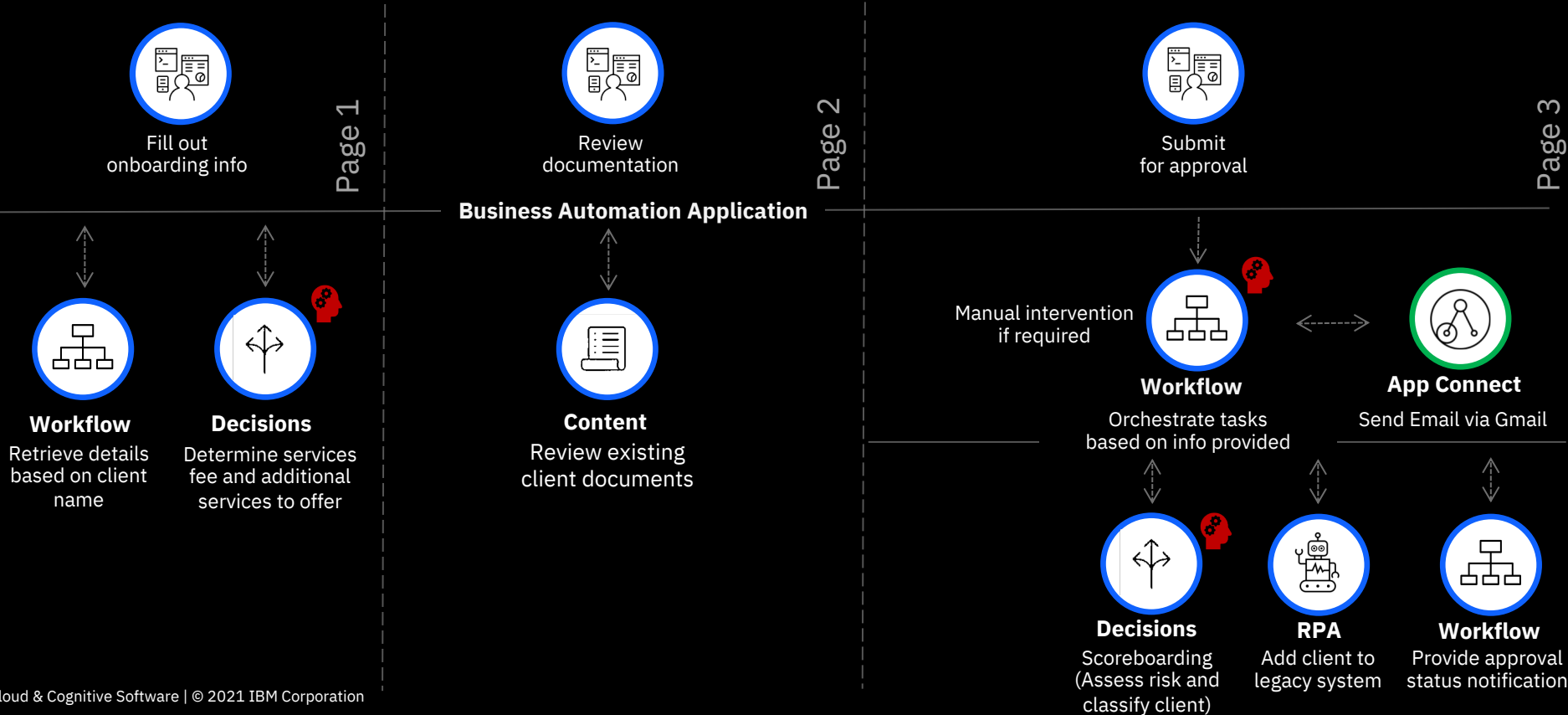## IBM Automation Platform

Intelligent Automation
Business Automation
Integration

Page 1

Fill out
onboarding info

Workflow
Retrieve details
based on client
name

Decisions
Determine services
fee and additional
services to offer

Business Automation Application

Review
documentation

Content
Review existing
client documents

Page 2

Submit
for approval

Manual intervention
if required

Workflow
Orchestrate tasks
based on info provided

App Connect
Send Email via Gmail

Decisions
Scoreboarding
(Assess risk and
classify client)

RPA
Add client to
legacy system

Workflow
Provide approval
status notification

Page 3

Intelligent Client Onboarding Scenario Flow
IBM Automation Platform

Intelligent Automation
Business Automation
Integration

Fill out onboarding info

Review documentation

Submit for approval

Page 1

Page 2

Page 3

Business Automation Application

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Workflow
Provide approval status notification

Demo

Tracks

Different tracks to cater for different target groups and previous levels of exposure to Cloud Pack for Business Automation

- **Track 1 – Foundation**
  - Audience: New to Cloud Pak for Business Automation (CP4BA)
  - Learning: Overview of the Cloud Pak from user perspective
                             Approach: Guided walk-through through solution capabilities

- **Track 2 - Developer Role / Solution Implementation**
  - Audience: Base understanding of Cloud Pak for Business Automation (CP4BA)
  - Learning: Overview of the Cloud Pak from developer and partly user perspective
                             Ability to develop pieces of the solution areas
  - Approach: Detailed lab instructions to build respective solution aspects

- **(Track 3 – Administrator Role)**
  - Audience: Base understanding of Cloud Pak for Business Automation (CP4BA)
  - Learning: Overview of the Cloud Pak from administrator/DevOps engineer perspective
                             Ability to install and configure components of CP4BA
  - Approach: Guided instructions to install and configure CP4BA

Labs

- End-to-End (end-user view)

- Business Automation Application

- Business Automation Insights

- Decisions

- FileNet Content Services

- Process Mining

- Robotic Process Automation

- Workflow

Business Automation Application [2 hrs.]

- **Abstract**
  - Low-code capability
  - Create a client onboarding application

- **Objective**
  - Learn how to create apps using the Application Designer
  - Leverage services built by developers in other parts of the platform such as Workflow, Decisions & Content.

- **Features Exercised**
  - Automation Services
  - Low-code tooling
  - Basic vs Advanced view mode
  - Building and creating UIs using views
  - Responsive applications

# Business Automation Insights (BPC) [1 hour]

- ## Abstract
  - In this lab exercise you will use Business Performance Center as part of Business Automation Insights to create a business dashboard that will enable a business user to get a real time business insight into mortgage processing.

- ## Objective
  - The objective of this lab exercise is to enable you to build business dashboards using the data in BAI emitted by CP4BA runtimes such as ADS, Workflow, or Content.

- ## Features Exercised
  - Dashboard creation and management
  - Chart creation and configuration
  - Adding charts to dashboards
  - Creation and configuration of chart-based business alerts
  - Organizing charts in dashboards using business goals
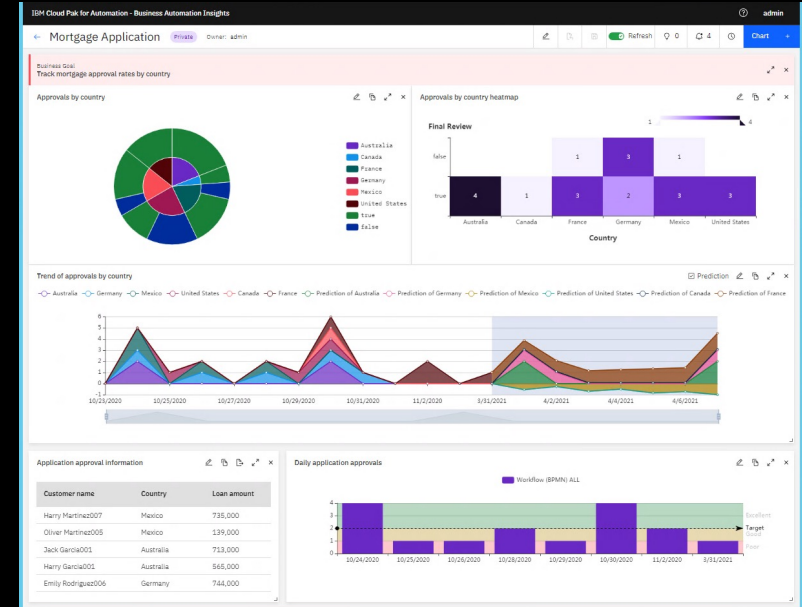
# Decisions (Automation Decision Services) [3 hrs.]

- **Abstract**
  - Create and manage business decisions based on client onboarding solution data
  - Infuse intelligence by adding a predictive model into a decision service
  - Connect a decision service to a GitHub repository

- **Objective**
  - Understand the key concepts of Automation Decision Services
  - Learn how to model business decisions and validate them
  - Leverage AI in a decision by creating a predictive model connected to the Machine learning deployment
  - Learn how to collaborate on your decision services

- **Features Exercised**
  - Decision automations project
  - Decision Designer to model, author and validate decisions
  - Machine learning model invocation from decision model
  - Deployment in Decision Designer
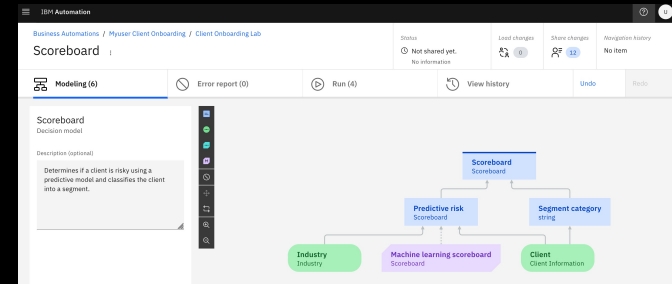
End-to-End [2 hrs.]

- **Abstract**
  - Execute an intelligent client onboarding scenario that uses multiple capabilities of IBM Cloud Pak for Business Automation

- **Objective**
  - Learn the art of the possible for the platform

- **Features Exercised**
  - Low-code applications
  - Orchestrate tasks using Workflow
  - Store documents using Content
  - Get structured data from documents using Capture
  - Use intelligent business rules using Decisions
  - Automate manual tasks using Robotic Process Automation

FileNet Content Services [6 hrs.]

- **Abstract**
  - Content Platform Engine (CPE) is configured for Storing and Maintaining documents for supporting an application
  - Review Configuration and Usage of new features of the products

- **Objective**
  - Learn about core concepts and features like Document Classes and Properties, Security, Storage Areas
  - Explore the Graph QL interface and Content Based Retrieval

- **Features Exercised**
  - Defining Document Properties and Class hierarchy for an application
  - Configure Security settings through direct and default instance security
  - Apply Security changes to multiple documents through Bulk Actions
  - Reassign documents to different storage areas / storage policies
  - Configure Event Subscriptions
  - Test integration with Content Search Services

Process Mining [3 hrs.]

- **Abstract**
  - Explore and master the power of IBM Process Mining and learn how to apply it to real business scenarios

- **Objective**
  - Master the basics and some of the key advanced Process Mining features
  - Learn how to use Process Mining to identify business improvement and automation opportunities

- **Features Exercised**
  - Creation of new project form CSV data sets
  - Using Process views to discover process bottlenecks, rework, top 5 variants, non-conformant activities
  - Using Filters to drill down into process data and perform root cause analysis
  - Using Business Dashboards and Analytics to track KPI violations and identify automation candidates
  - Use simulations to discovery automation ROI
  - Learn how use IBM Process Mining to simulate IBM Blueworks Live processes

IBM Process Mining

IBM Cloud Pak for Business Automation Practitioner
Foundational
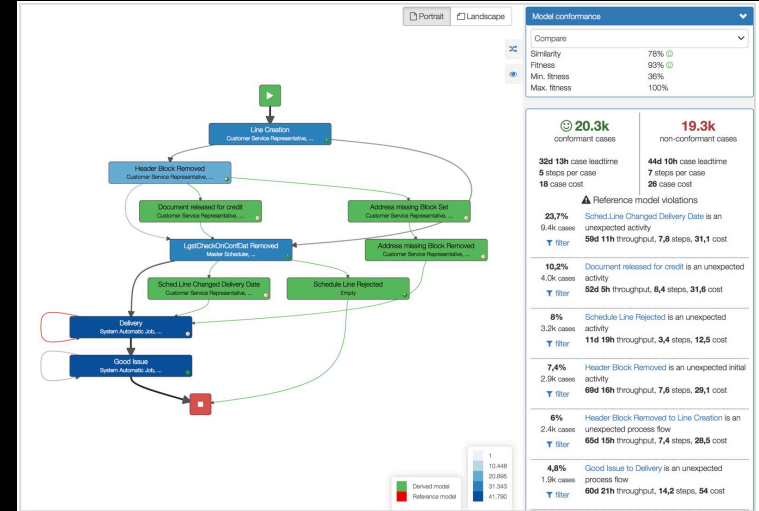
Robotic Process Automation [3.5 hrs.]

- **Abstract**
  - You will use IBM RPA Studio to develop a bot script to automate a Java swing application called Client Management System and a web application called Services Management System. Next you will implement a Workflow Process to invoke this bot to add client information and information about the services they signed up to to those two applications. Finally, you will use IBM RPA Studio to develop a chatbot to allow the client to manage some of the client information through themselves.

- **Objective**
  - Gain basic knowledge of the IBM RPA offering
  - Learn how to use IBM RPA Studio to develop and debug bot scripts
  - Learn how to use the Recorder to automate a Java Swing Application
  - Learn how to automate a web application
  - Learn how to invoke a bot script from a Workflow process using the IBM RPA REST API
  - Learn how to use IBM RPA Studio to develop a chatbot and expose it externally through a chat mapping configuration

- **Features Exercised**
  - IBM RPA Studio
  - Recorder
  - IBM RPA REST API
  - BAW integration with IBM RPA
  - Chatbot

Workflow [5 hrs.]

- **Abstract**
  - Combination of Case and Process capabilities into a unified Workflow offering
  - Create a client onboarding solution that contains different activities

- **Objective**
  - Understand the basics of Workflow
  - Learn how Case and Process integrate together
  - Build UIs for human services
  - Leverage services from other capabilities in the platform
  - Publish services built in Workflow to the platform

- **Features Exercised**
  - Case & Process integration using toolkit views and JavaScript API
  - UI creation using Coaches and Client-side human services
  - Case Builder, Process Designer & Case Client
  - Automation Services
  - External Services

Intelligent Client Onboarding Scenario – Summary
IBM Automation Platform

- Client Onboarding solution showcases a **combination of capabilities from the IBM Automation platform**

- The end-to-end solution digitizes **all aspects of the business freeing up knowledge workers**

- Highlights how using **AI for automation** can **improve efficiency** without losing control

- Scenario will be expanded to include additional capabilities

- IBM Cloud Paks can further add value:

  o Cloud Pak for Data to add more AI capabilities

  o Cloud Pak for AIOps & Security to operate and secure the solution

Survey

https://www.surveymonkey.com/r/CP4BATechJam2021

IBM®

Cloud Pak for Business Automation Tech Jam Survey

Thank you for attending the Cloud Pak for Business Automation Technical Jam. Your feedback will help us to improve our offerings and future events.

About The Offering

* 1. How likely is it that you would recommend Cloudpack for Business Automation (CP4BA) to a friend or colleague?

Not at all likely										Extremely likely
0	1	2	3	4	5	6	7	8	9	10