

# Cloud Pak for Business Automation Tech Jam – July 20-22, 2021



Bu Feng Hou  
Zhong Tao Gao  
Ke Feng Shao

Business Automation Elite SWAT

# Agenda

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

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# Who, Why, What



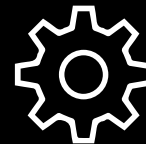
## Who

- 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

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# Jam Agenda – APAC

Getting Started: <https://github.com/IBM/cp4ba-tech-jam>

## Activity – Time Zone GMT+05:30h (Indian Standard Time)

WebEx:

<https://ibm.webex.com/meet/houbf>



Day 1	AM	<ul style="list-style-type: none"> <li>09:15-09:30 Arrival &amp; etc.</li> <li>09:30 [Bu Feng Hou] Welcome Note</li> <li>11:00 Choose &amp; provision scenario</li> </ul>	<ul style="list-style-type: none"> <li>09:30 [Bu Feng Hou] Scenario Overview</li> </ul>
	PM	<ul style="list-style-type: none"> <li>12:00 Start scenario implementation</li> <li>17:00 [Bu Feng Hou] Close Day 1</li> </ul>	<ul style="list-style-type: none"> <li>16:00 [Clandis Baker] Automation Document Processing</li> </ul>
Day 2	AM	<ul style="list-style-type: none"> <li>09:00 [Bu Feng Hou] Day 2 kick-off</li> <li>11:00 Continue scenario implementation</li> </ul>	
	PM	<ul style="list-style-type: none"> <li>12:00 Continue scenario implementation</li> <li>17:00 [Bu Feng Hou] Close Day 2</li> </ul>	<ul style="list-style-type: none"> <li>14:30 [Zhong Tao Gao] IBM Automation Platform Intelligent Client Onboarding Scenario – Tech Jam Infrastructure</li> <li>16:00 [Allen Chan] Introducing Watson Orchestrate</li> </ul>
Day 3	AM	<ul style="list-style-type: none"> <li>09:00 [Bu Feng Hou] Day 3 kick-off</li> <li>09:30 Complete scenario implementation</li> </ul>	
	PM	<ul style="list-style-type: none"> <li>Survey: <a href="https://www.surveymonkey.com/r/CP4BATechJam2021">https://www.surveymonkey.com/r/CP4BATechJam2021</a></li> <li>15:30 [Bu Feng Hou] Feedback / Open Discussion / Q&amp;A &amp; Closure</li> </ul>	



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# Logistics

## Dates

<b>Americas:</b>	<b>Tuesday June 8 to Thursday June 10</b>	<b>[9:00am – 5:30pm GMT+2:00h]</b>
<b>EMEA:</b>	<b>Tuesday June 22 to Thursday June 24</b>	<b>[9:00am – 5:30pm GMT -4:00h]</b>
<b>APAC:</b>	<b>Tuesday July 20 to Thursday July 22</b>	<b>[9:00am – 5:00pm GMT+5:30h]</b>

## Logistics

### Hosts:

- Americas: Tom Al-Hamwy, Swapnil Agrawal
- EMEA: Olaf Hahnl, Juergen Lukas
- **APAC:** **Bu Feng Hou, Zhong Tao Gao**

### WebEx:

- Americas: <https://ibm.webex.com/join/talhamwy>
- EMEA: <https://ibm.webex.com/join/jlukas>
- **APAC:** <https://ibm.webex.com/join/houbf>

### Instructions:

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

### 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

## Participants

- Participants: **104**
- Registrants: **242**

### Countries Represented: [16]

Australia, Brazil, Canada, China, Hong Kong, India, Indonesia, Korea, Malaysia, New Zealand, Philippines, Poland, Singapore, Sri Lanka, Taiwan, Thailand, United States, Viet Nam

## 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)

### EMEA GMT+2:00h

- Olaf Hahnl (CP4BA, Workflow, Process Mining)
- Juergen Lukas (CP4BA, BAA, BAI)
- Thomas Schulze (CP4BA, Workflow)
- Matthias Jung (Content, CP4BA)
- J. Mariasine, F. Penaud, F. Mercier, T. Houmadi (ADS)

### Americas GMT-4:00h

- Swapnil Agrawal (CP4BA, BAA, Workflow, BAI)
- Paul Pacholski (Workflow, RPA, Process Mining, BPC)
- Clandis Baker (Capture)
- Alain Robert (ADS)

### 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

Unify and simplify software experiences with seamless integration of related capabilities

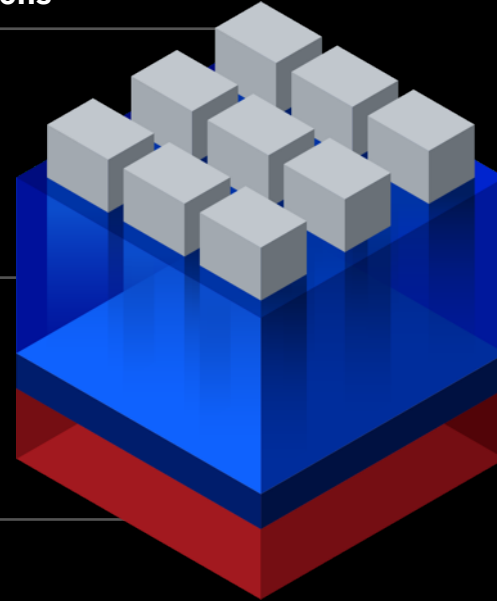
Enable software to run anywhere, on any cloud, as agile cloud-native services

**Solutions, products and applications**

**Cloud Paks**



**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

Business operations

Workforce management

App and infrastructure stability

Platform operations

Optimize AIOps

Hybrid cloud integration

Real-time analytics

Transactional integrity

Site deployment automation

4G/5G telco cloud platform


NFV lifecycle management

## IBM Cloud Paks

### IBM Cloud Pak for Business Automation

- Workflow and decisions
- Content services
- Operational intelligence

### IBM Cloud Pak for Watson AIOps

- Application impact avoidance
- Hybrid application management
- Observability  INSTANA

### IBM Cloud Pak for Integration

- Application integration
- API management
- Messaging and events

### IBM Cloud Pak for Network Automation

- Intent-driven orchestration
- Closed-loop operations
- Network optimization

## Automation foundation

- Robotic Process Automation

- Process and task mining

- Natural language interactions

- Machine learning

- Event detection

- 3rd Party integrations

- Operational models



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

— 3<sup>rd</sup> Party integrations

— Operational models



IBM Cloud



AWS



Microsoft Azure



Google Cloud



VMware



Private

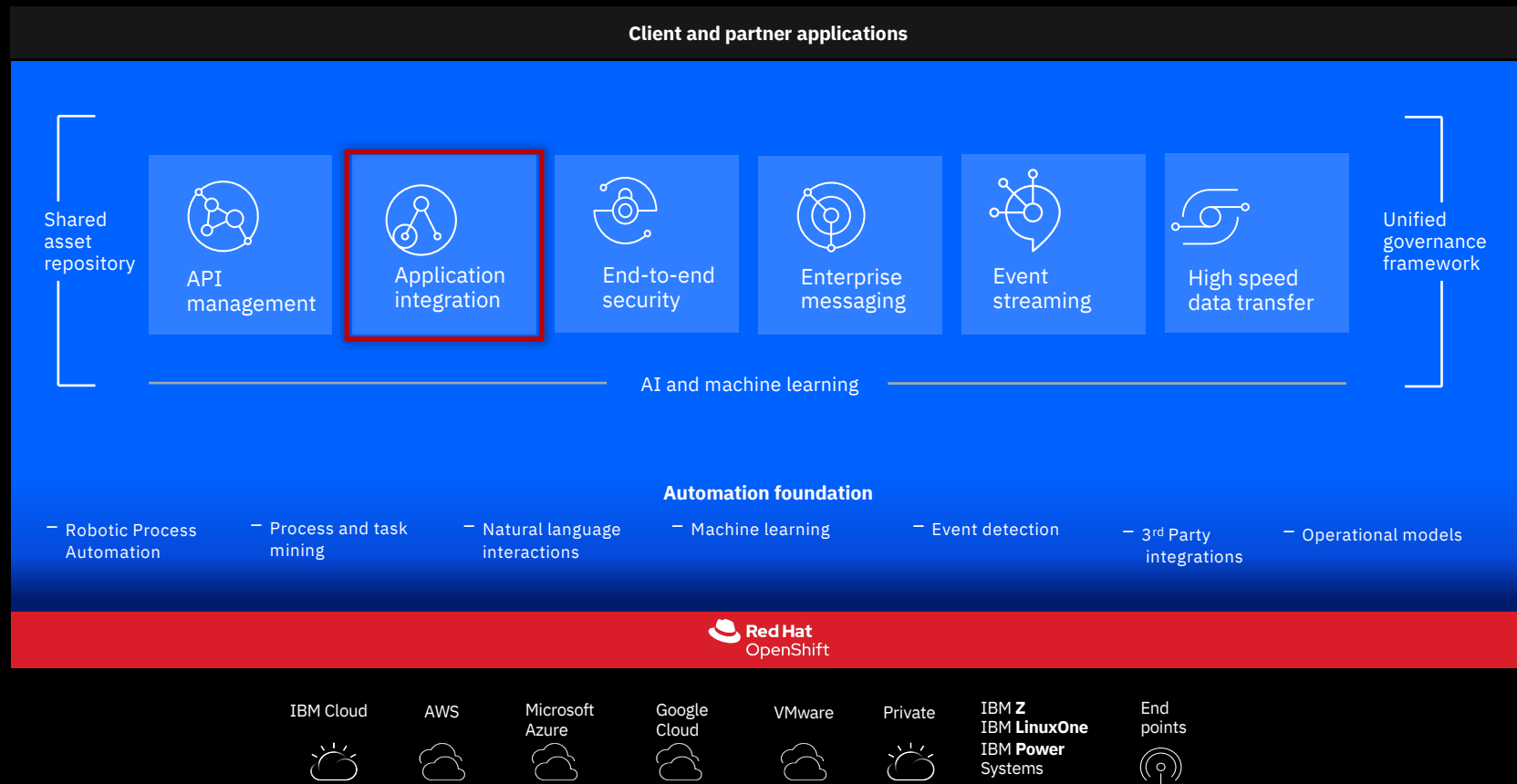


IBM Z  
IBM LinuxOne  
IBM Power Systems

End points



# IBM Cloud Pak for Integration



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# Intelligent Client Onboarding Scenario – Introduction

## IBM Automation platform






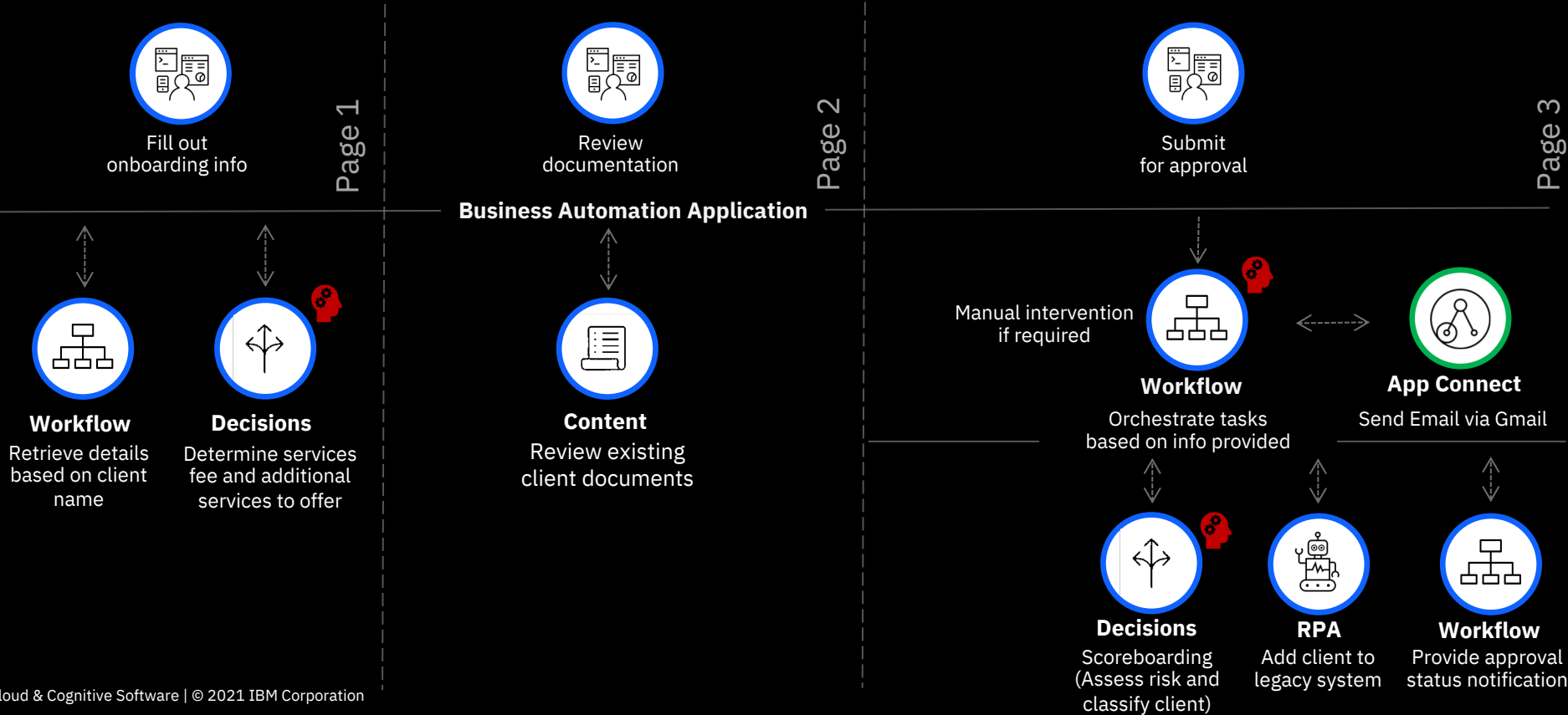
- Client Onboarding solution as part of Focus Corp's business as a service provider
- Focus Corp offers various services for different industries
- Showcases a combination of capabilities from the IBM Automation platform to digitize all aspects of the business
- Assets are used for enablement (Tech Jams), POCs, testing, sales and customer demos
- Features
  - A fully automated use-case and one requiring a knowledge worker
  - Usage of AI-Powered and Intelligent Automation



# Intelligent Client Onboarding Scenario Flow

## IBM Automation Platform

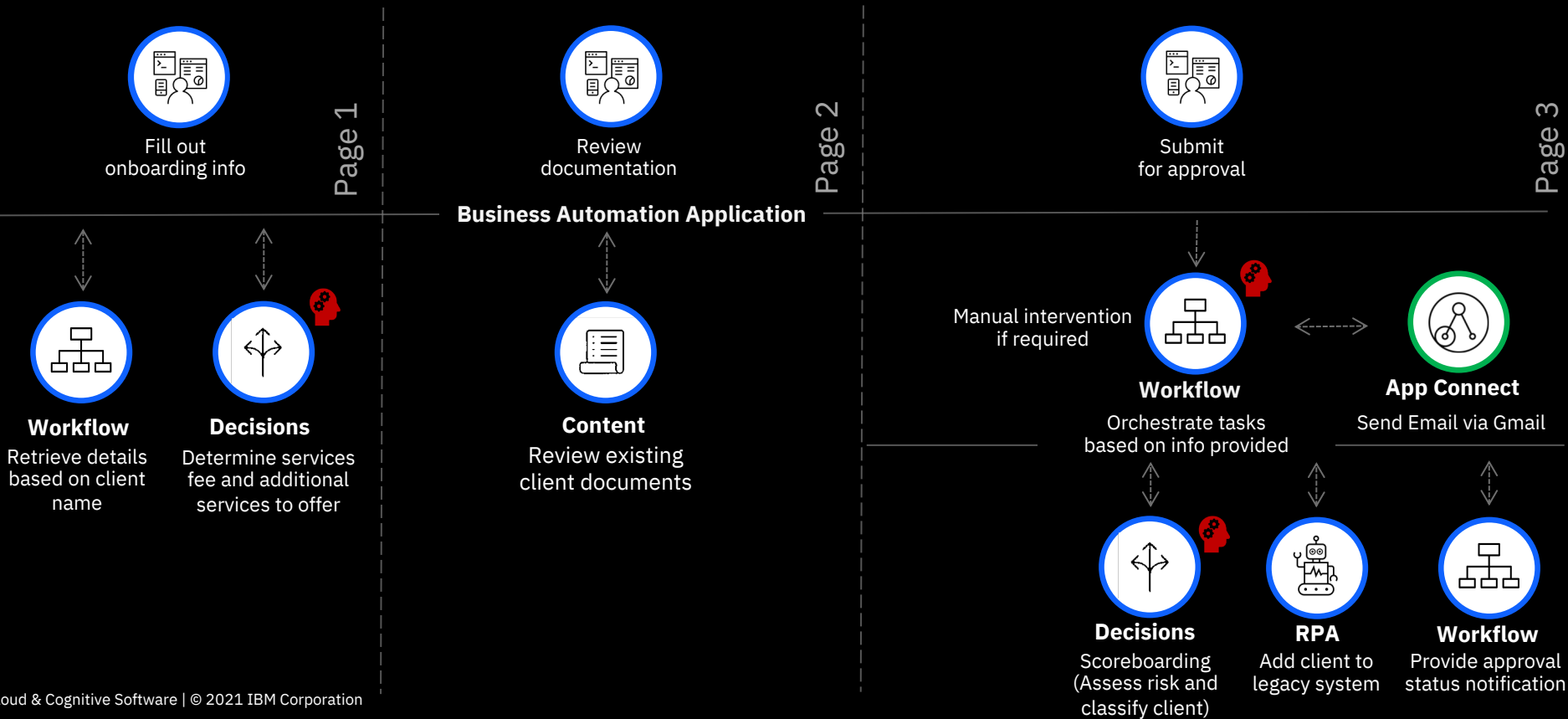
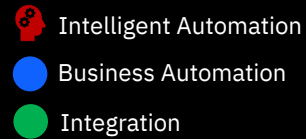
-  Intelligent Automation
-  Business Automation
-  Integration





# Intelligent Client Onboarding Scenario Flow

## IBM Automation Platform



# Demo

# Tracks

Different tracks to cater for different target groups and previous levels of exposure to Cloud Pak 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

Client Onboarding

Focus Corp

Client Rep

Focus Corp offers services in multiple industries. Select the industry for which the services are being offered.

Industry

Federal

Look for client information using the auto-complete and click on the Search button to get their information.

Client Name

Automation Elite Inc.

Search

Client Information

Enter the information of the client being onboarded.

Information to get in touch with the client.

Additional client information.

Establishment Date

25 years

Number of Employees

350

Annual Revenue

\$ 2,750,000.00

Payment History

No Defaulted Payments

Select the services that the client is interested in.

Services Requested

☒ Education Funding

☒ Green Technology Equipment

☒ Infrastructure Consultation

☐ Transport Security

Get Service Fees

Service Fees

\$ 1,600.00

Additional services the client may be interested in

Transport Security

Review Documents

# Business Automation Insights (BPC) [1 hour]



## ■ Abstract

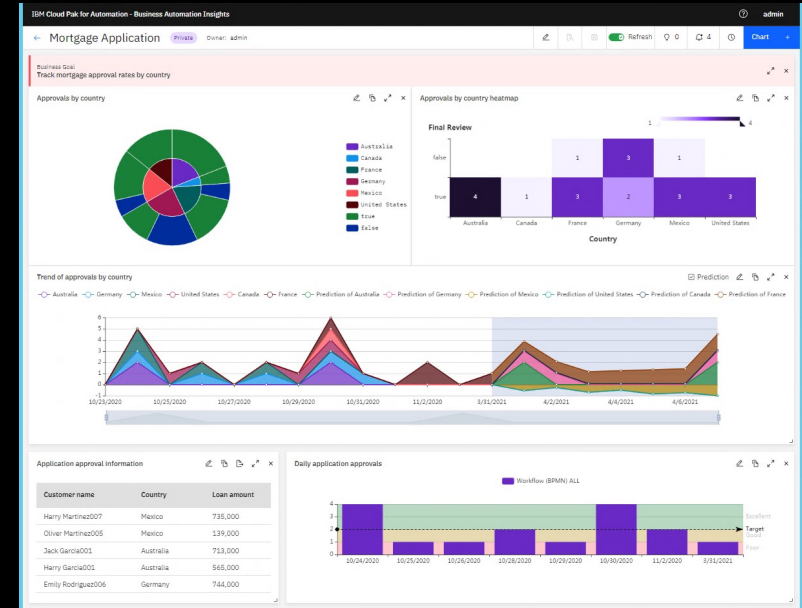
- In this lab exercise you will use Business Performance Center as part of Business Automation Insights to create a business dashboard that will enable a business user to get a real time business insight into mortgage processing.

## ■ 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

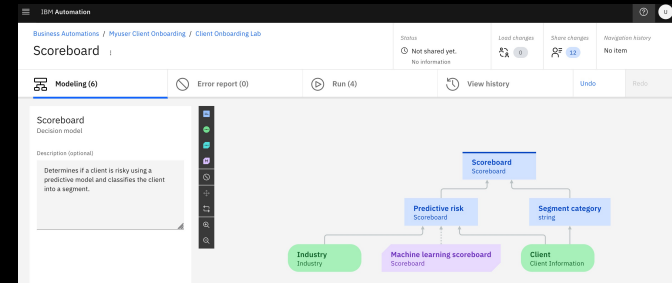
- Create and manage business decisions based on client onboarding solution data
- Infuse intelligence by adding a predictive model into a decision service
- Connect a decision service to a GitHub repository

## ■ 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 [4 hrs.]



## ▪ Abstract

- Content Platform Engine (CPE) and IBM Content Navigator (ICN) are 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 Entry Templates, Object Stores, Document Classes and Properties
- Learn about administration of FileNet CPE and ICN with focus on the Container Releases
- Learn about Recovery Bins and explore the Graph QL interface

## ▪ Features Exercised

- Configuring Recovery Bins in Content Navigator
- Creating Entry Templates in Content Navigator
- Creating Object Stores and Advanced Storage Areas in Content Platform Engine
- Extending the Data Model, and Deploying Data Model between Object Stores
- Consistency Checking of Document Storage
- Configure Event Subscriptions



# Process Mining [3 hrs.]



## ■ Abstract

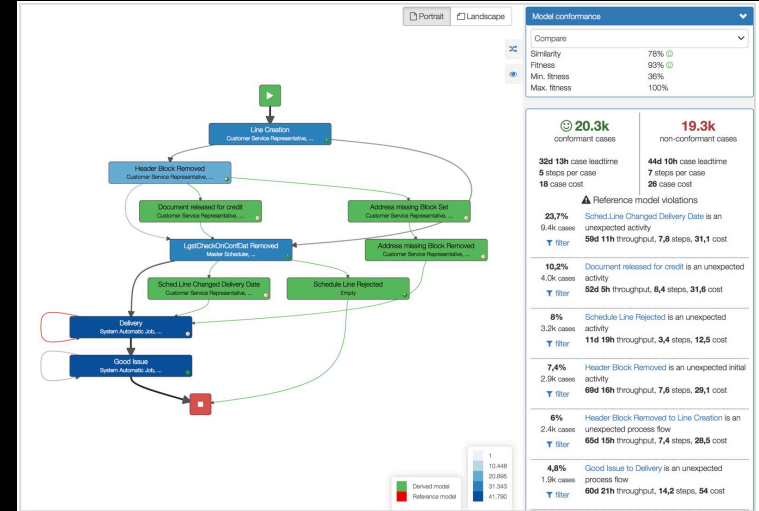
- Explore and master the power of IBM Process Mining and learn how to apply it to real business scenarios

## ■ 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 from 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



# 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:
  - Cloud Pak for Data to add more AI capabilities
  - Cloud Pak for AIOps & Security to operate and secure the solution



# Survey



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



## 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	

