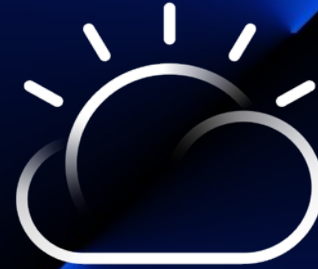


Client Onboarding Scenario Badge Questions



Bu Feng Hou

Business Automation Elite SWAT



Automation Mobile Capture (AMC)

Due to strategy change, we are under the way to remove all questions related to AMC

1. Lab instruction has been updated
2. Badge Questions are underway

Which of the following does IBM Automation Mobile Capture to build mobile capture solutions? Select all applicable

A	A generic iOS/Android app for testing
B	Web components to embed into web sites
C	An iOS/Android SDK to embed into native apps
D	Plugins to messengers like WhatsApp

Which products belong to the Document processing capability?
Select all applicable

A	IBM Datacap
B	IBM Automation Content Analyzer
C	IBM Automation Mobile Capture
D	IBM Automation Document Processing

Lab Instruction Page 4

your processes run, visualize issues, pinpoint fixes, and prioritize actions.

A single business automation capability may contain multiple products. For example, Document processing encompasses IBM Datacap and IBM Automation Document Processing. IBM Robotic Process Automation is part of the Automation Foundation and also directly featured in the Cloud Pak for Business Automation. It is one of the few capabilities currently not running on OpenShift but requiring Windows.

Which products need to work together when the client provides a new document? Select all applicable

A	Capture: IBM Mobile Capture to upload the document
B	Content Services: To store the document and data
C	RPA: To continue the workflow
D	Workflow: To create a task to review the uploaded document

Example – Not Related to AMC

Which of the following belong to the **core automation capabilities** that the Cloud Pak for Business Automation provides? Select all applicable.

A	Workflow
B	Document Processing
C	Integration
D	Decision Management
E	Prediction

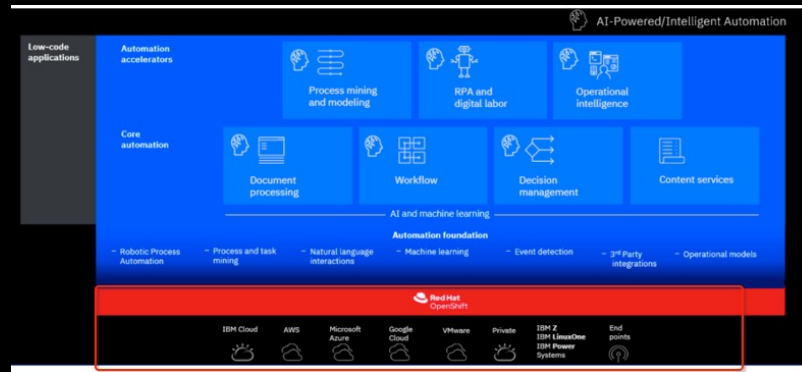
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Which of the following **deployment models** are supported by the Cloud Pak for Business Automation? Select all applicable

A	Hybrid
B	Cloud
C	Edge
D	On-premises
E	Hybrid

Lab Instruction Page 4



IBM Cloud Pak for Business Automation can run on any Cloud public or private if Red Hat OpenShift can run there.

A	True
B	False

Lab Instruction Page 4



Which tool can be used to build **applications (apps)** within the Cloud Pak for Business Automation?

A	IBM Business Automation Application Designer
B	IBM Automation Solution Designer
C	IBM Automation Workflow Solution Designer
D	IBM Automation Service Designer
E	IBM Business Automation Application Designer

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1.2 Business Scenario

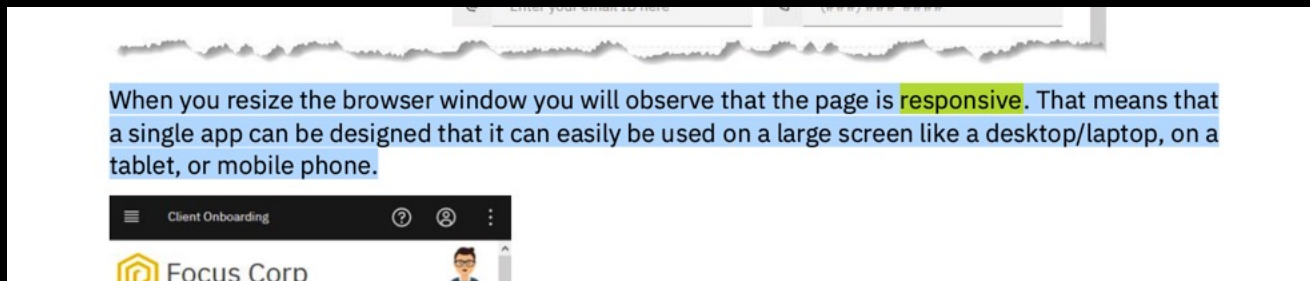
The overall Client Onboarding solution consists of a multi-page front-office intake app and a workflow that orchestrates all back-office activities (both automatic and system ones) to either onboard the client or reject their onboarding request.

The client representative initially works with the Client Onboarding app. This app has been created by the business using the low-code Automation Application Designer. It leverages services created by IT in the other capabilities of the platform. When a client calls, the client representative collects all required information about the client and the services the client wants to subscribe to, before they

To support multiple form-factors (phone, tablet, laptop) dedicated apps need to be created to support the different screen sizes.

A	True
B	False

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Solutions built using IBM Cloud Pak for Business Automation can support both fully automated types of business transactions and those requiring knowledge worker involvement.

A	True
B	False

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Apps built using IBM Cloud Pak for Business Automation support the following **UI capabilities**. Select all applicable

A	Responsive UI
B	Type ahead feature
C	Different field types and formats (e.g. text, date, number)
D	Dynamic dependencies between controls

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_6. Click on **Automation Elite Inc.** once the **type ahead feature** offers it.

_9. **Select Finance** in the **Industry** drop-down list as Automation Elite Inc. requests to onboard to one service in that domain.

Selecting an entry from the drop-down **dynamically** changes the options in the services to onboard.

What are the **benefits** of using IBM Robotic Process Automation to automate the legacy system of records (SOR)? Select all applicable

A	Avoiding human involvement in this activity
B	Avoiding potential of human errors when copying/pasting information
C	Improving operational insights by generating and visualizing events in dashboards of IBM Business Automation Insights
D	Reducing the number of inquiries to the SORs

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- The second is the Service Management System. It offers a web interface to interact with it.

As Focus Corp strives for a high level of automation, they want to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply Robotic Process Automation (RPA).

The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates the following screenshots explain the steps performed.

Which **capabilities** of Cloud Pak for Business Automation are used in the **Client Onboarding scenario** (not only the front-office intake app)?
Select all applicable

A	Workflow
B	Decision management
C	Process Mining
D	Operational Intelligence

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4 Outlook

The Client Onboarding scenario is ever evolving, interesting aspects are not yet implemented:

What determines if an account manager needs to manually review an onboarding request?

A	If all documents are present in the request
B	If the assessment confidence is below a threshold
C	If the customer is a segment 2 customer
D	If the risk of the onboarding request is high

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_2. Explore the task page.

The icon in the top right signifies that you are performing this task as an Account Manager. At the top (1) the four stages of the request processing are shown. This task is part of the scoreboarding stage where you as the account manager have to manually assess those onboarding requests that have a confidence below 75%. The first panel on the left (2) provides a summary of the request, mainly the Client Name, Reference ID and the Approval Status. The panel below (3) contains messages related to the request, for example that all required document have been verified. The main panel on the right (4) has four tabs. On the Details tab the scoreboard is shown that contains the assessment status. Clicking the link in the Scoreboard directs to the risk assessment tab.



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