Cloud Pak for Business Automation Tech Jam – August 17-19, 2021

Tom Al-Hamwy
Program Director, Business Automation Elite SWAT

Swapnil Agrawal
Americas Lead, Business Automation Elite SWAT

IBM

Agenda

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

Agenda

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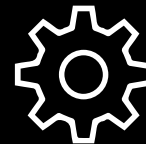- Scenario

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
- Scenario

Jam Agenda – Americas

		Activity – Time Zone UTC-4:00h (Eastern Daylight Time) **WebEx: https://ibm.webex.com/join/talhamwy**	
Day 1	**AM**	▪ 09:00-09:15 Arrival & etc. ▪ 09:15 [Tom Al-hamwy] Welcome Note ▪ 11:00 Choose & provision scenario	▪ 09:30 [Swapnil Agrawal] Scenario Overview
	PM	▪ 12:00 Start scenario implementation ▪ 17:00 [Tom Al-Hamwy] Close Day 1	
Day 2	**AM**	▪ 09:00 [Tom Al-Hamwy] Day 2 kick-off ▪ 11:00 Continue scenario implementation	▪ 09:30 [Thomas Schulze] IBM Automation Platform Intelligent Client Onboarding Scenario – Tech Jam Infrastructure
	PM	▪ 12:00 Continue scenario implementation ▪ 17:00 [Tom Al-Hamwy] Close Day 2	▪ 14:00 [Clandis Baker] Automation Document Processing
Day 3	**AM**	▪ 09:00 [Tom Al-Hamwy] Day 3 kick-off ▪ 09:30 Complete scenario implementation	▪ 11:00 [Allen Chan] Introducing Watson Orchestrate
	PM	▪ Survey: https://www.surveymonkey.com/r/CP4BATechJam2021 ▪ 15:30 [Tom Al-Hamwy] Feedback / Open Discussion / Q&A & Closure	

IBM Cloud Pak for Business Automation
General Practitioner
Foundational

IBM Process Mining
IBM Cloud Pak for Business Automation Practitioner
Foundational

IBM Robotic Process Automation
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 Business Automation Application
IBM Cloud Pak for Business Automation Practitioner
Foundational

Agenda

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

Logistics

Dates
Americas: Tuesday August 17th to Thursday 19th [9:00am – 5:30pm]

Logistics	Participants	Technical Team

Hosts:
- Americas: Tom Al-Hamwy, Swapnil Agrawal

WebEx:
- Americas: https://ibm.webex.com/join/talhamwy

- **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:	**105**
Registrants:	150

Countries Represented: [31]
- Argentina, Brazil, Canada, Chile, Colombia, India, Mexico, Peru, Uruguay, USA

Americas

- Swapnil Agrawal (CP4BA, BAA, BAW, BAI)
- Paul Pacholski (BAW, RPA, Process Mining)
- Clandis Baker (Capture)
- Jorge Rodriguez (Infrastructure)

- **Material - Github**
    - One stop for all material accessible across IBM
        - https://github.com/IBM/cp4ba-tech-jam
    - Register via IBM ID (SSO) if you haven't already

Agenda

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

The IBM hybrid cloud software approach

Solutions, products and applications

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

Cloud Paks

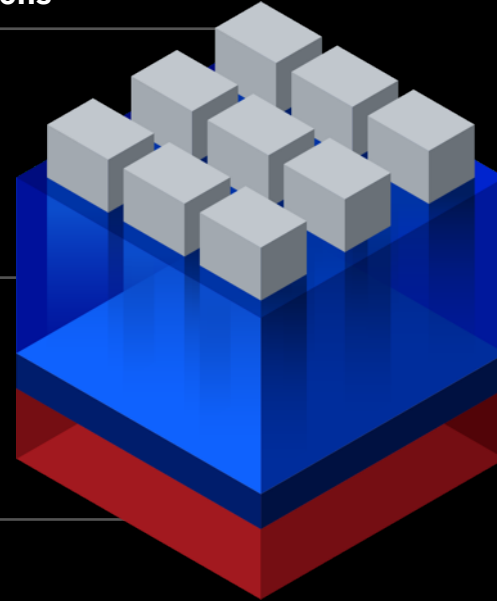Unify and simplify software experiences with seamless integration of related capabilities

Red Hat OpenShift **Hybrid cloud platform**

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

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
- 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

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

Agenda

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

Intelligent Client Onboarding Scenario – Introduction
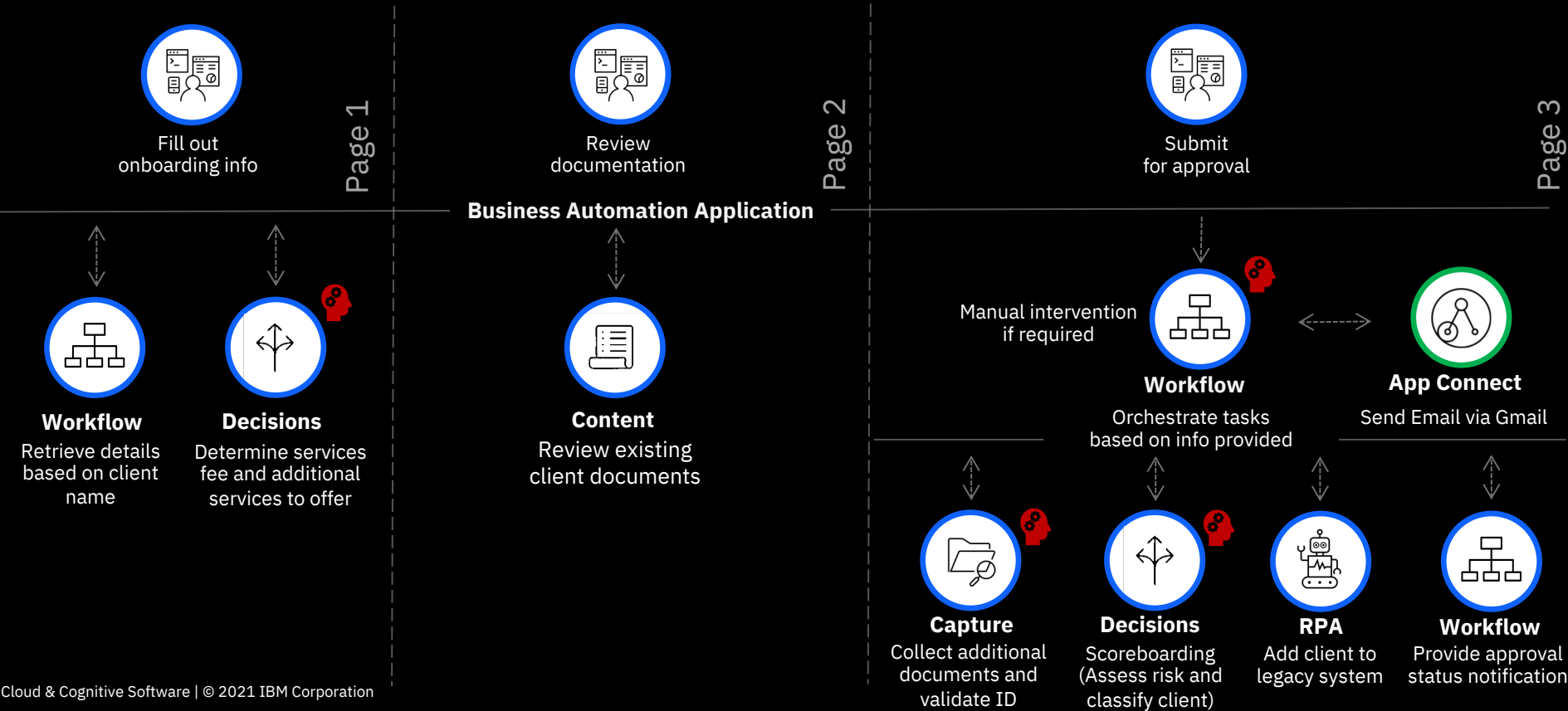## IBM Automation platform

- 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

Page 1   Page 2   Page 3

Fill out onboarding info

Review documentation

Submit for approval

Business Automation Application

Workflow
Retrieve details based on client name

Decisions
Determine services fee and additional services to offer

Content
Review existing client documents

Manual intervention if required

Workflow
Orchestrate tasks based on info provided

App Connect
Send Email via Gmail

Capture
Collect additional documents and validate ID

Decisions
Scoreboarding (Assess risk and classify client)

RPA
Add client to legacy system

Workflow
Provide approval status notification

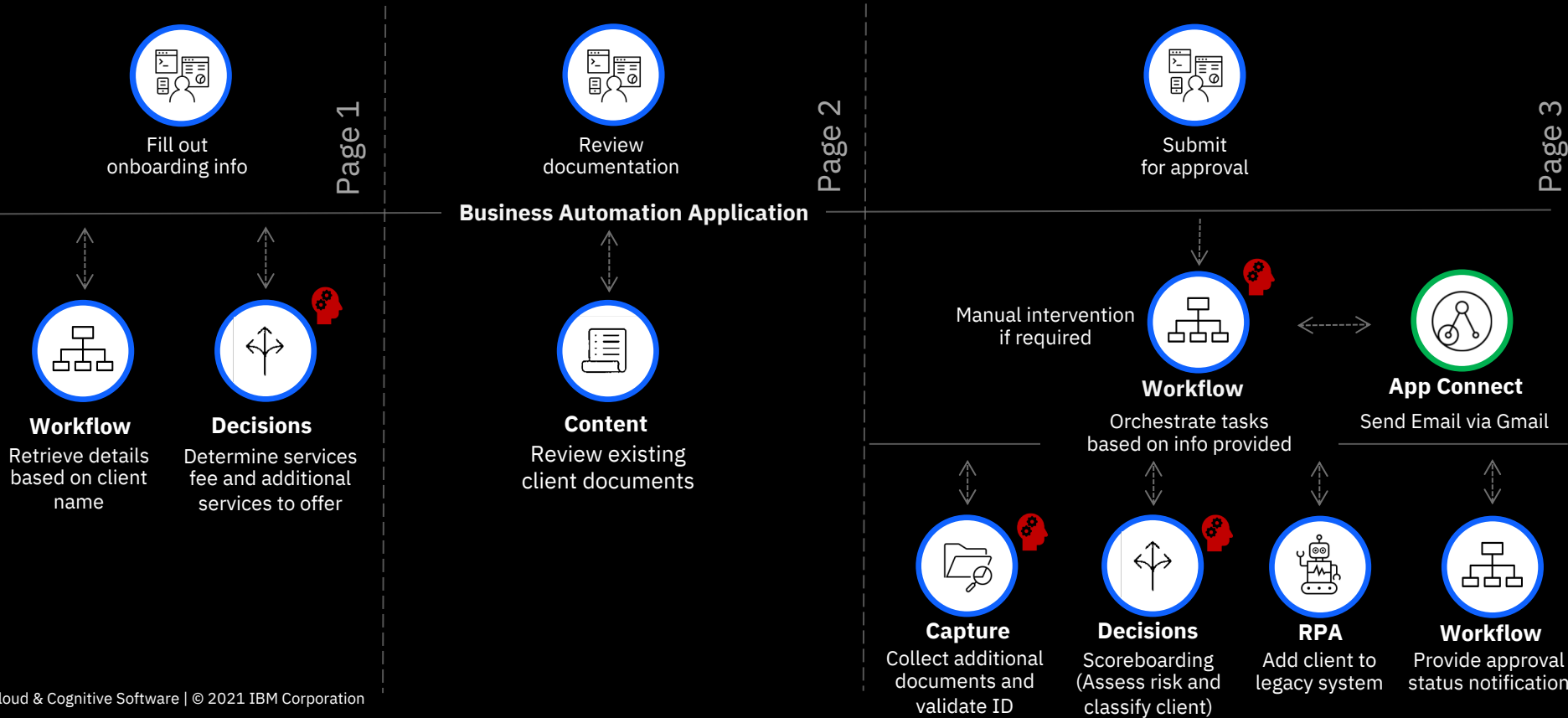# Intelligent Client Onboarding Scenario Flow
IBM Automation Platform

Intelligent Automation
Business Automation
Integration

Page 1

Page 2

Page 3

Fill out onboarding info

Review documentation

Submit for approval

Business Automation Application

Workflow
Retrieve details based on client name

Decisions
Determine services fee and additional services to offer

Content
Review existing client documents

Manual intervention if required

Workflow
Orchestrate tasks based on info provided

App Connect
Send Email via Gmail

Capture
Collect additional documents and validate ID

Decisions
Scoreboarding (Assess risk and classify client)

RPA
Add client to legacy system

Workflow
Provide approval status notification

Demo

Tracks

Three different tracks to cater for different target groups and previous levels of exposure to CP4Auto

- **Track 1 - Foundation**
  - Audience: New to Cloud Pak for Business Automation (CP4BA)
  - Learning: Overview of the Cloud Pak both from user and developer perspective
    (Usage of dev tools to explore the completed solution, not to implement it)
  - 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

- Business Automation Application

- Business Automation Insights

- Capture

- Decisions

- End-to-End

- 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 [1 hour]
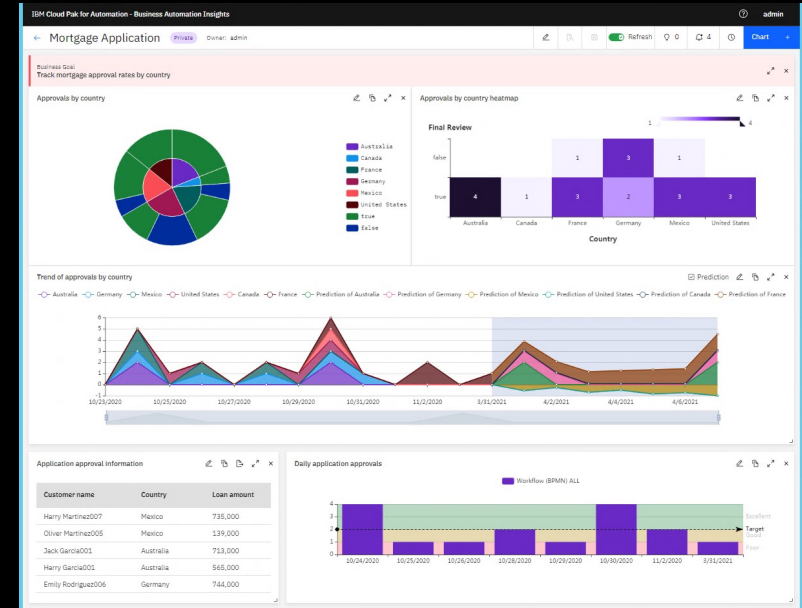
- **Abstract**
  - In this lab exercise you will use Business Performance Center to create a business dashboard that will enable a business user to get a real time business insight into mortgage processing.

- **Objective**
  - The objective of this lab exercise is to enable you to build business dashboards using the data in BAI emitted by CP4A runtimes such as ADS, BAW, 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
  -

Capture – Automation Mobile Capture (30 mins)

- **Abstract**
  - IBM Automation Mobile Capture (AMC) enables organizations to electronically capture documents wherever and whenever they are brought into the organization. Real-time document capture and processing capabilities help improve cycle times and accelerate customer service, while integration with back-end enterprise content management (ECM) systems lets you quickly move information from the field into business processes

- **Objective**
  - This lab demonstrates the configuration necessary to configure Automation Mobile Capture to connect to the CP4BA ROKS environment to upload a document to a FileNet repository folder using the IBM Mobile Capture mobile application.

- **Features Exercised**
  - Identify repository folder on the CP4BA ROKS FileNet environment
  - Create a service credential that AMC will use to access the CP4BA ROKS environment
  - Create a Connection on the AMC environment
  - Create a Scenario on the AMC environment
  - Use the IBM Mobile Capture mobile app to submit a document to the CP4BA ROKS FileNet environment
  - Review the upload document on the CP4BA ROKS environment

Decisions [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
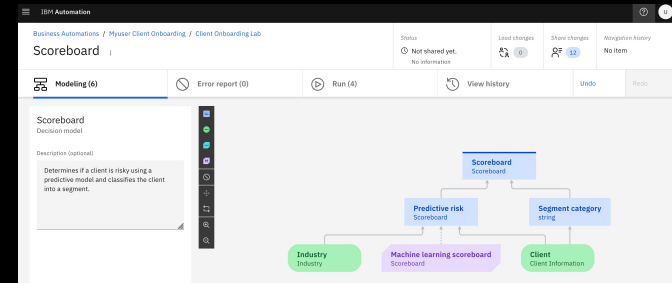
End-to-End [2 hrs.]

- **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 redundant tasks using Robotic Process Automation

IBM Cloud Pak **IBM**
for Business
Automation

General Practitioner
Foundational

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 form CVS 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
  - Business Dashboards and Analytics used to track KPI variolations and automation candidates
  - Use simulations to discovery automation ROI
  - Learn how use IBM Process Mining to simulation of IBM Blueworks Live processes

IBM Process Mining

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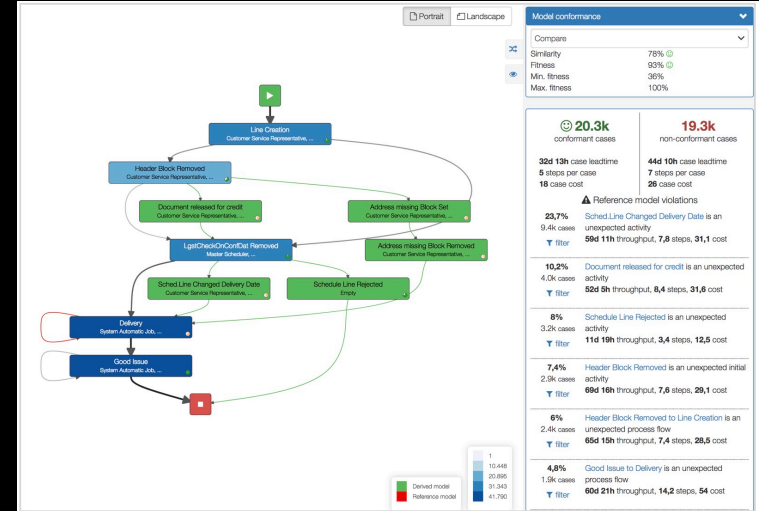
Robotic Process Automation [3.5 hrs.]

- **Abstract**
  - In this lab 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. Then you will implement a Workflow Process to invoke this bot to add client and its signed services information on those two application. Finally, you will use IBM RPA Studio to develop a chatbot for its client to manage client information.

- **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 automation web application
  - Learn how to invoke a bot script from BAW process using IBM RPA REST API
  - Learn how to use IBM RPA Studio to develop a chatbot and expose it externally through 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

Focus Corp

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

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