

IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide

Description	IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide
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Welcome

Welcome to the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide (lab guide). This lab guide covers the setup, configuration, and usage of assistants for watsonx Assistant for Z. The lab guide is part of the IBM watsonx Assistant for Z for Technical Sales Level 4 learning plan for IBM and Business Partner Technical Sales and related badge. The lab guide also enables dedicated lab environments for customized client Proof of Experiences (PoX) and demonstrations.

This lab guide leverages the [IBM watsonx Assistant for Z Velocity collection](#) and the 3 Velocity Pilot lab environments in IBM Technology Zone (ITZ).

The lab guide provides guidance to:

- Provisioning the lab environments
- Creating an assistant and configuring conversational search
- Configuring assistant settings
- Testing conversational search
- Deploying a dedicated instance of OpenSearch for client document ingestion (Optional)
- Importing skills for z/OS automations
- Connecting apps to assistants
- Creating assistant actions
- Creating skill flows and custom-built actions
- Importing pre-packaged z/OS skills
- Publishing and deploying your assistant

Continue to the [Reserve the IBM Technology Zone environments](#) section to begin the journey to obtaining the IBM watsonx Assistant for Z Technical Sales Advanced badge.

Support

Think something is down? Check the applicable status pages for any known issues like a site or service not available:

- [IBM Technology Zone](#)

For issues with provisioning the ITZ environment for this lab (for example, a failed reservation request due to insufficient quota capacity) open a ticket with ITZ support:

- Web: [IBM Technology Zone](#)
- Email: techzone.help.ibm.com

For issues related to specific steps found in the demonstration guide after the ITZ environment is provisioned, contact the authors:

- Slack: [#watsonx-assistant-z-technical](#) - IBM only
- Email: andrewj@us.ibm.com

Business Partners should use the IBM Training live Chat Support service or other support methods that are found on the IBM Training portal [here](#).

Using the demonstration guide

Use these helpful tips to take full advantage of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide.



Printing the demonstration guide

Printed or saved copies can be out of date

The IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide changes regularly to match the IBM watsonx Assistant for Z offering and associated ITZ environment. Printed or saved copies of the demonstration guide can become out-of-date quickly and result in failed steps.

A ready-to-print PDF version of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide is [here](#).



Viewing images

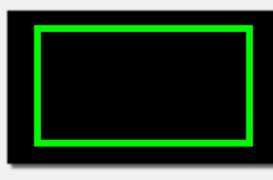
Images in the demonstration guide can be enlarged by clicking on the image. Press the key or click the X to dismiss the enlarged image.



Image highlighting

In some images, the following styles of highlighting are used:

- **Solid highlight box:** This style of box highlights where to click, enter, or select an item.



- **Dash highlight box:** This style of box highlights one of two things: the path to follow to get to a specific location in the user interface, or areas to explore on your own.





Copying commands and prompts

Copying and pasting commands and prompts from this demonstration guide is easy and can eliminate typographical errors.

Click the highlighted copy icon and then use your operating system's paste function. For example, ^ Ctrl + V or right-click and select Paste.

Prompt 1

What is the APF list in z/OS? Provide a detailed explanation.



Acronyms and terminology

IBM employees, and the tech industry in general, enjoy using acronyms. In the demonstration guide, most acronyms will appear with a dashed underline. Hover over the acronym to learn its meaning. A question mark (?) icon will first appear and after a second the tool tip with the acronym's meaning is displayed. Try it here: LPAR.



Guidance for delivering a demonstration



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IBM watsonx Assistant for Z

Welcome

Reserve the IBM Technology Zone environment

Guidance for delivering a demonstration

Demonstration scenarios >

Next steps

Specific guidance for IBM watsonx Assistant for Z and the ITZ environment

Following the scripts provided in the IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide will help guarantee a successful demonstration. Use these tips to help insure success with IBM watsonx Assistant for Z and the ITZ environment:

- Follow the scripts in the IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide for the automations and skills to execute as expected.

Table of contents

General demonstration guidance

Specific guidance for IBM watsonx Assistant for Z and the ITZ environment



The Demonstration Guide table of contents

This **Demonstration Guide** uses a responsive browser-based interface to ensure a pages are usable on various devices with different screen sizes. The Demonstration Guide table of contents may be displayed as highlighted in the green dashed box in this image:

IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide

Search

Welcome

Welcome to the **IBM watsonx Assistant for Z for Technical Sales Level 3** course and demonstration guide! The goal of this course is to provide IBM and Business Partner technical sellers the knowledge and tools to demonstrate **IBM watsonx Assistant for Z**.

This course is not intended to serve as an in-depth study of IBM watsonx Assistant for Z, watsonx, or IBM Z; rather the focus is on learning how to deliver a client demonstration of IBM watsonx Assistant for Z. More specifically, the focus is on the *end-user* creating queries and by using trusted automations through skills that are suggested by IBM watsonx Assistant for Z.

Other aspects of IBM watsonx Assistant for Z including creating and configuring assistants, importing and creating new skills, and ingestion of client documentation are **not** covered in this demonstration guide. To learn more and get hands-on with these additional capabilities, check out the Velocity Pilot information in IBM Technology Zone (ITZ) [here](#).

Obtaining the IBM watsonx Assistant for Z Technical Sales Intermediate badge

IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide

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- IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration Guide
- Welcome
- Guidance for delivering a demonstration
- Reserve the IBM Technology Zone environment
- Demonstration scenarios
 - Introduction to scenarios
 - Scenario 1: Authorized Program Facility
 - Scenario 2: Certificate renewal
 - Scenario 3: Db2 versioning
 - Scenario 4: Initial Program Load on Z
 - Additional IBM Z related prompts
 - Summary
 - Next steps
 - Printing the guide
 - Instructions

However, if the browser window is sized smaller, the table of contents can be accessed by clicking the main menu icon (≡):

IBM watsonx Assistant for Z for Technical Sales Level 3 Demonstration...

Search

Welcome

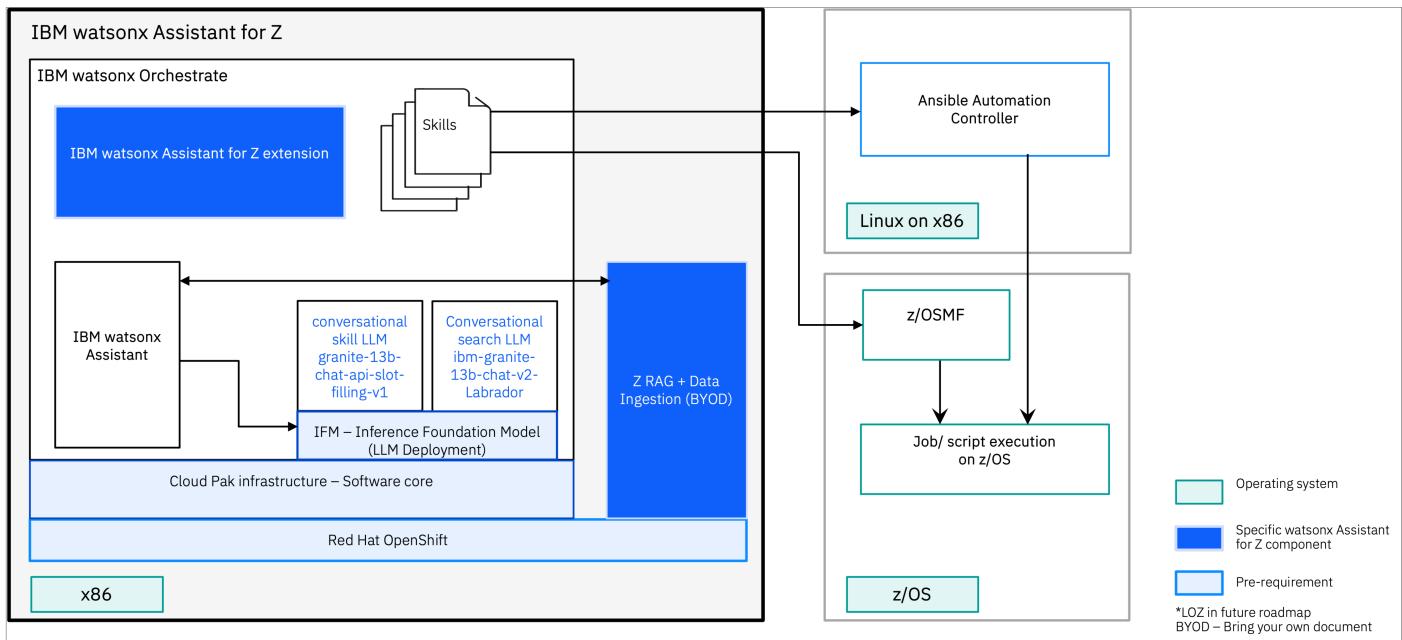
Welcome to the **IBM watsonx Assistant for Z for Technical Sales Level 3** course and demonstration guide! The goal of this course is to provide IBM and Business Partner technical sellers the knowledge and tools to demonstrate **IBM watsonx Assistant for Z**.

Click the main menu icon (≡) to expand the table of contents.

IBM Technology Zone environment

*

To enable sellers to demonstrate IBM watsonx Assistant for Z, an environment was created in IBM Technology Zone (ITZ). This environment mimics a typical client deployment of IBM watsonx Assistant for Z, similar to this deployment architecture.



Follow the instructions in this section to create a new reservation request, extend the reservation, and access the ITZ demonstration environment.

Create a reservation request

Follow these steps to create a reservation in ITZ.

1. Click the following link to open a browser to the reservation page of the **IBM watsonx Assistant for Z**.



You may be asked to authenticate to IBM Technology Zone

The steps to authenticate to ITZ are not detailed here as they may vary between users.

IBM watsonx Assistant for Z - reservation page

2. Click **Reserve now**.

The **Reserve now** option creates a reservation for immediate use. Optionally, schedule the reservation for a later date, like when you will be at your client's office.

IBM Technology Zone | My TechZone | Help

Create a reservation

IBM watsonx Assistant for Z

Select a environment/infrastructure Select a reservation type Fill out your reservation Complete

Select your reservation type. Do you need this now or later?

Single environment reservation options:

- Reserve now
- Schedule for later

[View collection](#)

3. Complete the reservation request and click **Submit**.

- a. Optionally, change the **Name** field for the reservation.
- b. Select the **Education** purpose tile.
- c. Enter a **Purpose description**.
- d. Select any geography in the **Preferred Geography** drop-down.
- e. The **End date and time** will be set to 2 days after the current date and time.
- f. Accept the IBM Technology Zone's terms and conditions and security policies.
- g. When satisfied with the parameters, click **Submit**.

IBM Technology Zone | My TechZone | Help

Create a reservation

IBM watsonx Assistant for Z

Select a environment/infrastructure Select a reservation type Fill out your reservation Complete

Name a
Demo Access - watsonx Assistant for Z
Name this reservation. This will help identify it in your reservations list.

Purpose b

Demo	Deliver a client specific demonstration based on discovery with the client and aligns to the identified architecture. Automatically captures a Technical Sales Activity in IBM Sales Cloud on the Opportunity code provided.
Pilot	Rapid co-creation build that proves IBM technologies can deliver business value to clients' end users. Serves as a foundation to build a production solution. Automatically captures a Technical Sales Activity in IBM Sales Cloud on the Opportunity code provided.
Please ensure to select the correct purpose as this can NOT be updated or changed after this reservation has been created. Review the Reservation Duration Policy to understand default durations allowed for specific infrastructures based on purpose.	

Sales Opportunity number c
Enter an opportunity number
Providing an [IBM Sales Cloud](#) [Community number](#), [Gainsight Relationship ID](#), or a [Project Work ID](#) will allow you to extend your reservation date.

Purpose description d
Level 3 training

What are you doing? Why did you need this? What are you trying to accomplish?

Preferred Geography e
any - AMERICAS - any region - any datacenter

End date and time f
Select a date: 09/27/2024 Select a time: 12:29 PM America/Chicago

Notes g
Enter any notes you would like to attach to this reservation

I agree to IBM Technology Zone's [Terms & Conditions](#) and [End User Security Policies](#)

Submit

Extend the reservation

The ITZ provisioning process takes approximately 15 minutes. Multiple emails are sent to you from ITZ as the provisioning process runs. One email states the reservation is provisioning and the other email states that the environment is **Ready**.

In rare cases, the provisioning process may fail. If you receive an email stating the reservation failed, try again by repeating Steps 1-3.

When the reservation is in the **Ready** state, you can extend your reservation to a total of 6 days. Remember, IBM sellers need the environment to record their Stand and Deliver and Business Partners need an environment to answer quiz questions.

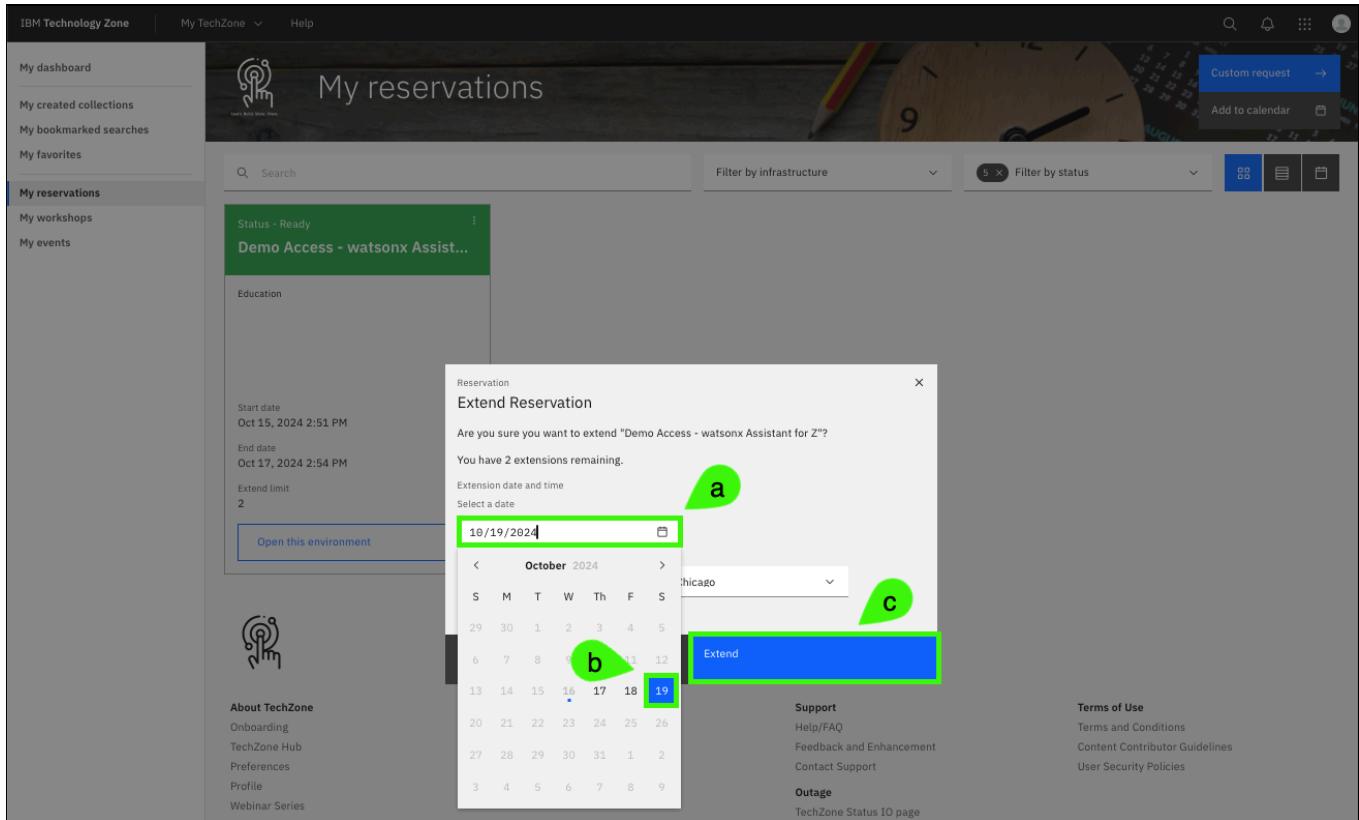
4. In the IBM Technology Zone portal, expand **My TechZone** at the top and select **My Reservations**.

The screenshot shows the IBM Technology Zone portal interface. The top navigation bar includes 'IBM Technology Zone', 'My TechZone ▾', 'Help', and a search bar. The left sidebar has links for 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', **My reservations** (which is selected and highlighted in green), 'My workshops', and 'My events'. The main content area displays a welcome message 'Welcome to Technology Zone, Andrew' and a section titled 'Certified Base Images' with a sub-section 'Best starting point to build'. Below this is a calendar view for August 2024. A large central area features a circular graphic with colored nodes and arrows, and a hand cursor is pointing at the three-dot overflow menu icon on a reservation tile.

5. Click the **overflow icon (≡)** on the reservation tile and select **Extend**.

The screenshot shows the 'My reservations' section of the IBM Technology Zone portal. The left sidebar is identical to the previous screenshot. The main area shows a list of reservations. One reservation titled 'Demo Access' is highlighted with a green box. An overflow menu is open next to it, showing options: 'Reservation details', 'View collection', 'Support', '**Extend**' (which is also highlighted with a green box), 'Share', 'Transfer', 'Re-reserve', and 'Delete'. At the bottom of the reservation card, there is a button labeled 'Open this environment'.

6. Click the **Select a date** option, specify the date to extend to, and then click **Extend**.



If you anticipate needing more time, repeat Steps 5 and 6 to extend the reservation to the maximum of 6 days.

Accessing the demonstration environment

Access to the IBM watsonx Assistant for Z demonstration environment is provided through a web interface to a fictitious company's intranet website.

7. Click on reservation tile in the ITZ My reservations page.

The screenshot shows the ITZ My reservations page. On the left, there's a sidebar with links like 'My dashboard', 'My created collections', 'My bookmarked searches', 'My favorites', 'My reservations' (which is selected and highlighted in grey), 'My workshops', and 'My events'. The main area is titled 'My reservations' and features a search bar and filters for infrastructure and status. A single reservation card is displayed, which has been highlighted with a green box. The card details are as follows:

- Status: Ready
- Demo Access - watsonx Assis...
- Purpose: Education
- Start date: Oct 7, 2024 2:16 PM
- End date: Oct 13, 2024 2:20 PM
- Extend limit: 0
- [Open this environment](#)

8. Click Open your IBM Cloud environment.

This screenshot shows the detailed view of the 'Demo Access - watsonx Assistant for Z' reservation. At the top, it displays the reservation title, date range (Oct 15, 2024 2:51 PM to Oct 19, 2024 2:54 PM), and status (Ready). Below this, there are sections for 'Desktop' and 'Shared Reservation'. Under 'Desktop', there is a prominent blue button labeled 'Open your IBM Cloud environment' with a copy icon next to it. Below this button, the URL 'Desktop url: https://wxa4z.techzone.ibm.com' is shown. The 'Shared Reservation' section is currently empty. At the bottom, there are fields for 'Purpose' (Education) and 'Opportunity Product(s)' (Education), along with 'Opportunity ID(s)' and 'Opportunity description' (both set to 'I3 testing').



You may be prompted to authenticate

In some instances, you may be prompted to authenticate when attempting to access the **Open our IBM Cloud environment** link. Use the same IBM ID and password used to reserve the ITZ environment.

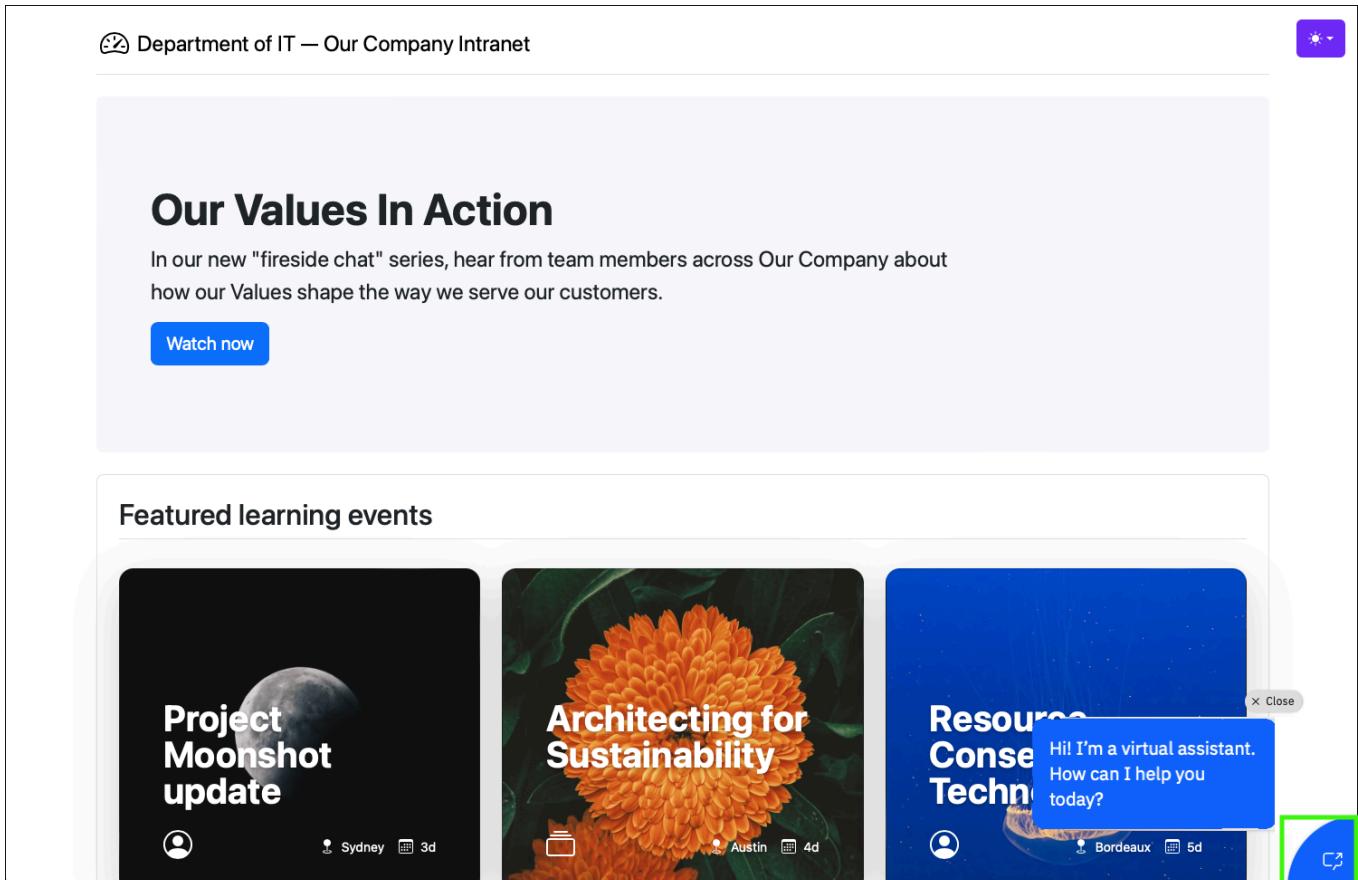
The demonstration portal page

The demonstration portal page provides two ways of accessing the IBM watsonx Assistant for Z virtual assistant.

The chat icon

The first method is to use the assistant chat icon that appears at the lower right of the page. The **Hi! I'm a virtual assistant. How can I help you today?** dialog appears after a few seconds as the page loads.

9. Click the **Virtual Assistant chat icon**.



This action opens the virtual assistant in the current browser page as a pop-up dialog. This approach provides an integrated view of the web page and the virtual assistant dialog; however, the dialog could be considered small for giving a live demonstration if the audience is expected to read the output.

10. Close the **Virtual Assistant** dialog.

The screenshot shows a company intranet page titled "Department of IT — Our Company Intranet". The main content features a section titled "Our Values In Action" with a sub-section about a "fireside chat" series. A blue button labeled "Watch now" is visible. Below this, there's a "Featured learning events" section with three cards: "Project Moonshot update" (Sydney, 3d), "Architecting for Sustainability" (Austin, 4d), and a partially visible card starting with "Res Cor Tec". On the right side of the page, a "Z Assistant" chat window is open. The window has a green border around its top-right corner. It displays a welcome message: "Hi! I'm a virtual assistant. How can I help you today?". At the bottom of the window is a text input field with the placeholder "Type something..." and a send button icon.

The full page virtual assistant

The second user interface available for the virtual assistant is a full browser page experience.

11. Scroll to the bottom of the page and click **Techbot (in a new tab)** under **Technology**.

Technology updates

Enabling our business to achieve and grow through providing the best in technology. Learn about some of the exciting programmes being delivered in coming months!

[Learn more](#)

CEO Roadshow

The CEO of Our Company is visiting your area! Get updates on the schedule, and register your questions in advance of the Town Hall session at your location.

[Check the schedule](#)

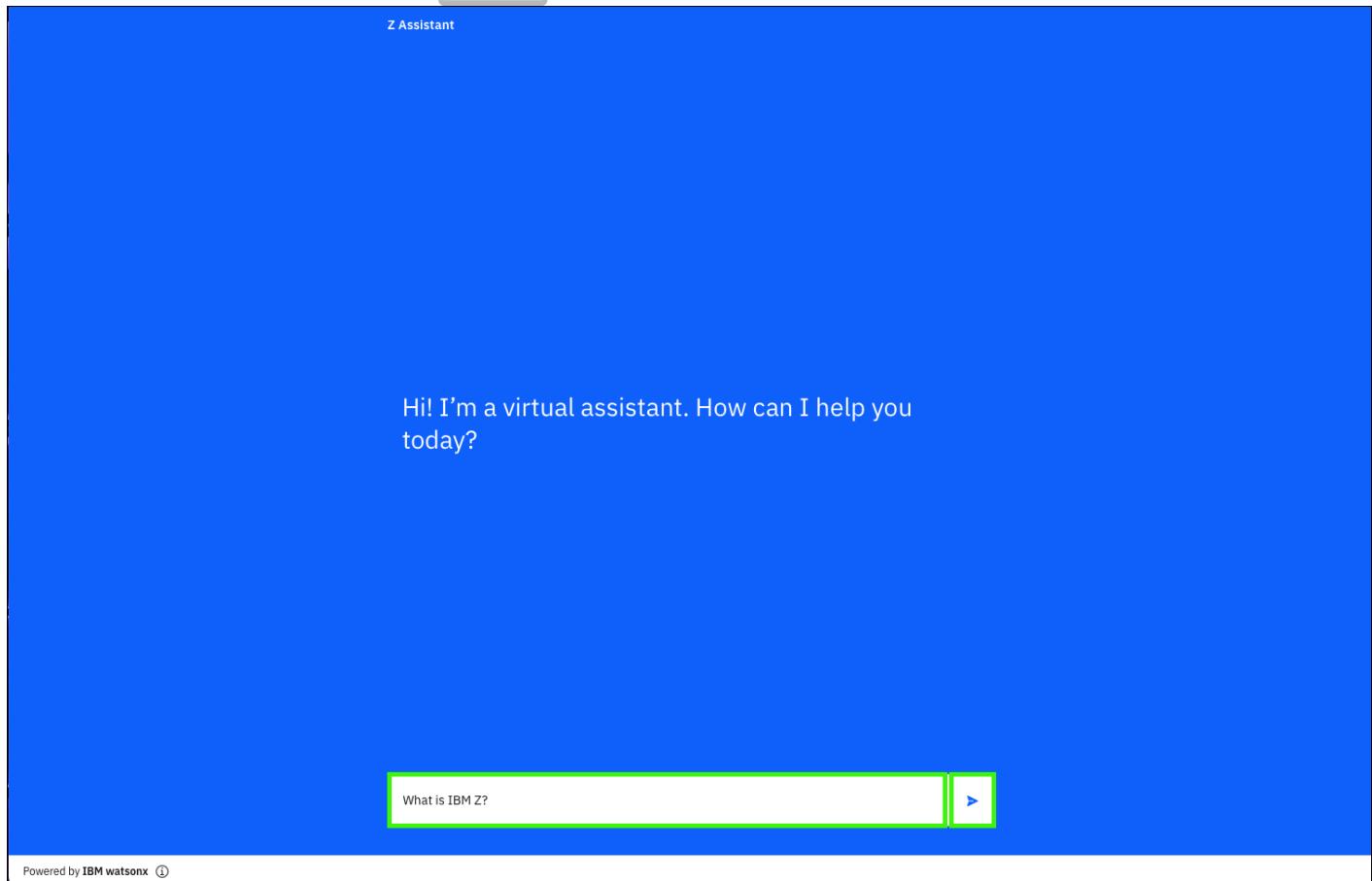
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Technology About Platforms TechPortal TechBot (pop-out) TechBot (in a new tab) Service Delivery	Sales Products Trials and Demos Case studies FAQs Financing	Corporate History Careers Newsroom Corporate Responsibility Investor Relations
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The full-page virtual assistant interface opens in a new browser window or tab (this is dependant on your browser preferences). The full-page virtual assistant interface is used for all screen captures in later chapters.

Using the virtual assistant

Enter a query into the field and press **Enter ↵** or click the **Send** icon ().



The screenshot shows the IBM Watson Assistant interface. At the top, it says "Z Assistant". In the center, there is a message from the virtual assistant: "Hi! I'm a virtual assistant. How can I help you today?". Below this, there is a text input field containing the query "What is IBM Z?" and a "Send" button to its right. The entire interface is set against a blue background.

Proceed to the next section to run through different IBM watsonx Assistant for Z client scenarios detailed in this demonstration guide.

Next steps

This IBM watsonx Assistant for Z for Technical Sales Level 4 demonstrated several of the IBM watsonx Assistant for Z capabilities. However, there is still more to learn about IBM watsonx Assistant for Z. Be sure to check out the [offering landing page](#) and the [product documentation](#).

Also, the focus of the IBM watsonx Assistant for Z for Technical Sales Level 4 Lab Guide was the *end-user* use of IBM watsonx Assistant for Z. To learn more about deploying, configuring, and customizing IBM watsonx Assistant for Z explore the other capabilities that are included in the [ITZ collection](#) [here](#). Included are guidance for running client pilots and the ability to manage an IBM watsonx Assistant for Z deployment. In the Velocity Pilot environment, you can explore all the capabilities of the offering like creating an assistant, importing documents, and adding automation skills.

Earn the badge

Finally, remember to complete the IBM watsonx Assistant for Z for Technical Sales Level 4 learning plan to earn the IBM watsonx Assistant for Z Technical Sales Advanced badge.

IBM technical sellers must complete a Stand and Deliver exercise to validate their ability to demonstrate IBM watsonx Assistant for Z to potential clients. Refer to the evaluation checklist in the [YourLearning learning plan](#) for the Stand and Deliver.

Business Partners must pass the IBM watsonx Assistant for Z for Technical Sales Level 4 quiz that is located in the [IBM Training learning plan](#). The Business Partner quiz verifies use of the demonstration environment and click-through demonstrations, and not one's general knowledge of the offering.