Business Automation Demos and Labs

Use the IBM Workplace Assistant to Work with Processes and Tasks in IBM Business Automation Workflow

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1 Lab Introduction

IBM Workflow Assistant is a Watsonx conversational assistant integrated into Workplace, providing an embedded web-chat interface that allows you to interact with Business Automation Workflow through natural conversation.

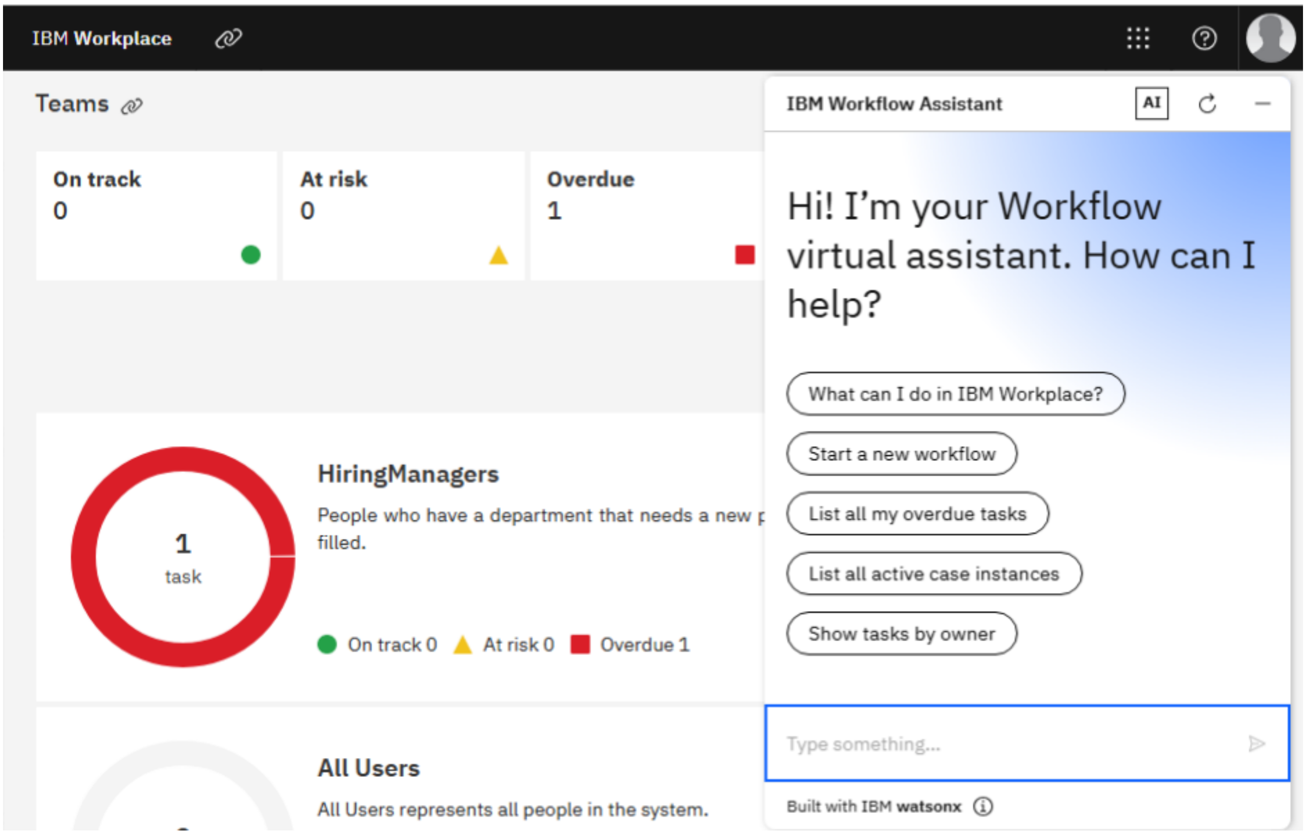


Figure 1. IBM Workflow Assistant in IBM Workplace.

The Assistant uses large language models (LLMs) to answer specific questions, extract and summarize information, generate content, or complete generative AI tasks. By answering questions and generating content in response to your prompts, the conversational Assistant streamlines your task management process, allowing you to find, prioritize, and complete tasks or cases efficiently. This ultimately improves your work efficiency through an interactive and intelligent user experience.

The Assistant offers the following functions, enabling you to navigate more efficiently, gain a deeper understanding of your tasks, and become more productive in completing your work:

Start actions. You can also ask the Assistant to start a workflow or a new instance of a specified case solution on your behalf.

Task actions. Filtering your tasks based on prompts helps you gain a clearer understanding of them at a glance. You can provide a summary of the task or ask questions, such as its status, owner, due date, and other relevant details. Prioritize tasks for yourself using the Task Priorization AI feature or other user-defined prioritization criteria. You can ask the Assistant to update the due date or priority of tasks, reassign them to a different user, or return them to the team for others to claim.

Workflow actions. You can filter workflows by status, due date, priority, or business data.

Case actions. You can filter cases by status, due date, priority, or business data.

Team actions. As a team manager, you can use the Assistant to view all the teams that you manage and also understand and manage their workload.

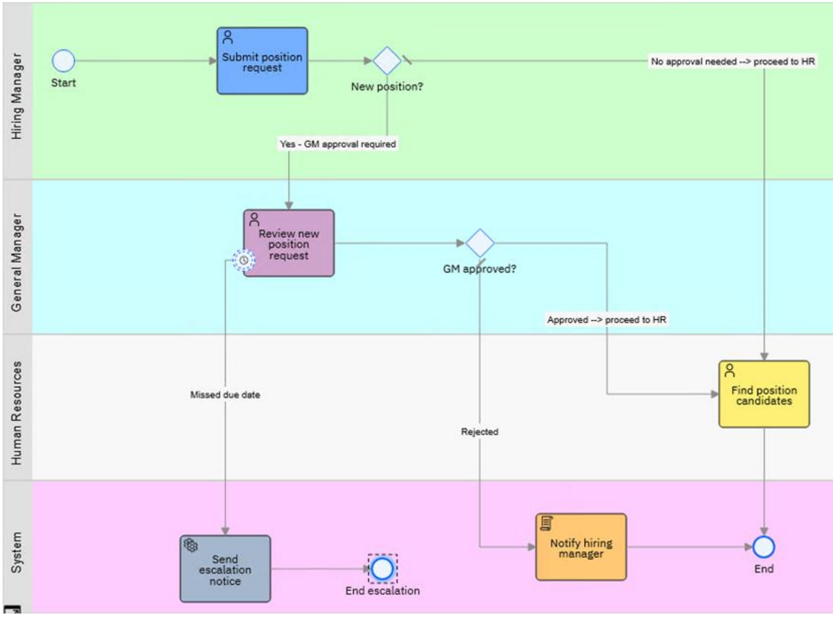
1.1 Lab Scenario

1.1.1 Smart Hire Process

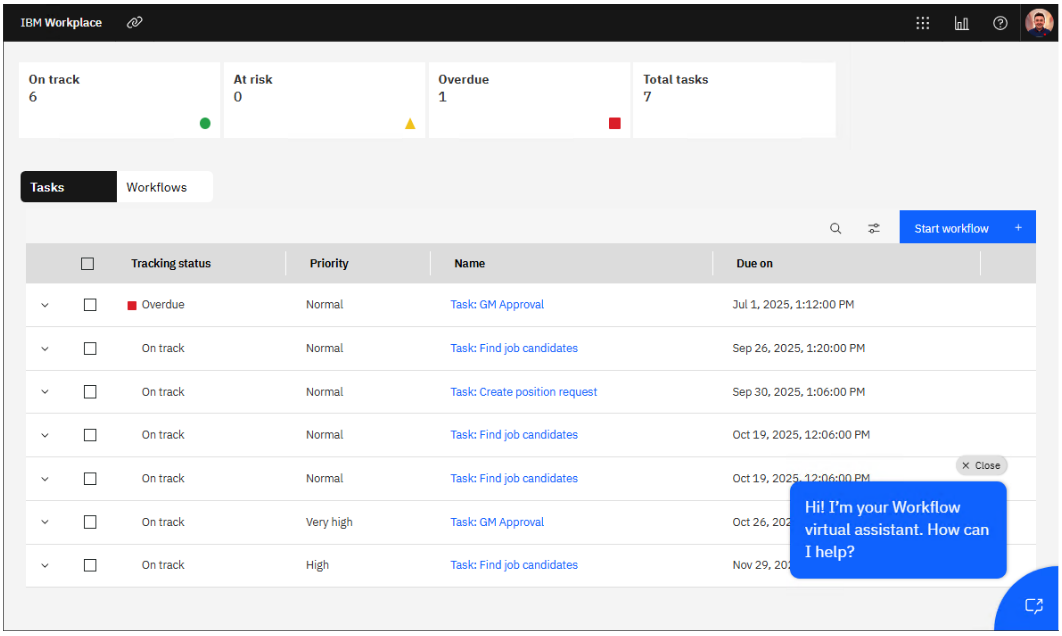
Focus Corp is a business services provider offering a range of services for various industries. Recently, Focus Corp automated their HR Talent Acquisition by implementing a "Smart Hire" process.

1.1.2 Using Workplace Assistant for Smart Hire Porcess

In the lab, we will work with instances of the Smart Hire Process using IBM Workspace and the AI Assistant, which is a new AI feature added to IBM Workplace.



Specifically, you will explore three features of the IBM Workflow Assistant: ***Start actions, Task actions,*** and ***Team actions.***



Note that we have already created several instances of the porcess and completed some tasks to populate the task list.

2 Lab Instructions

2.1 Download and Configure Project Files

_1. Open this document: https://ibm.ent.box.com/v/wxO-Agentic-SDK.

2.2 Reserve IBM watsonx Orchestrate ADK and DBA - US East Only

_1. Create a Tech Zone Reservation: **1.1 Reserve Tech Zone Environment**

Note: This environment includes the Digital Business Automation VM, which provides the IBM Business Workflow runtime required for this lab.

2.3 BAW VM Setup

_1. Access the IBM DBA VM: **1.3.1 Access the DBA VM**

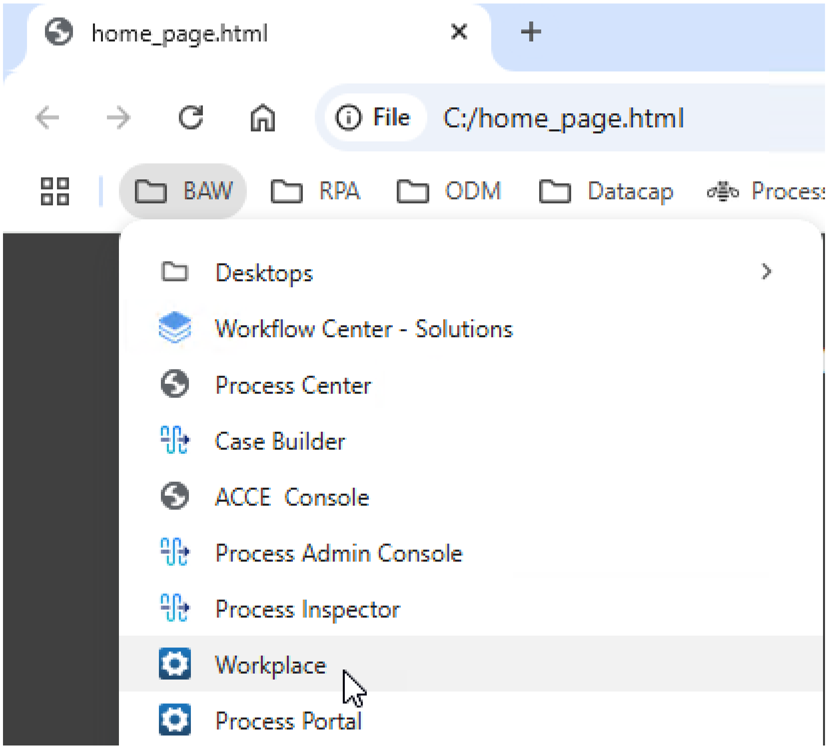
Note that you can use either the simple Console method or the Remote Desktop method.

_2. Start the BAW Server: **1.3.2 Start IBM Business Automation**

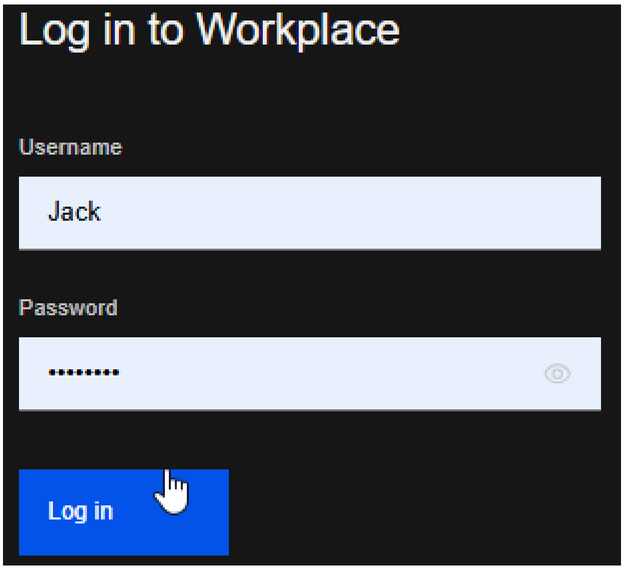
2.4 Open Workplace and Launch the Assistant

_1. Start the **Chrome** Web Browser.

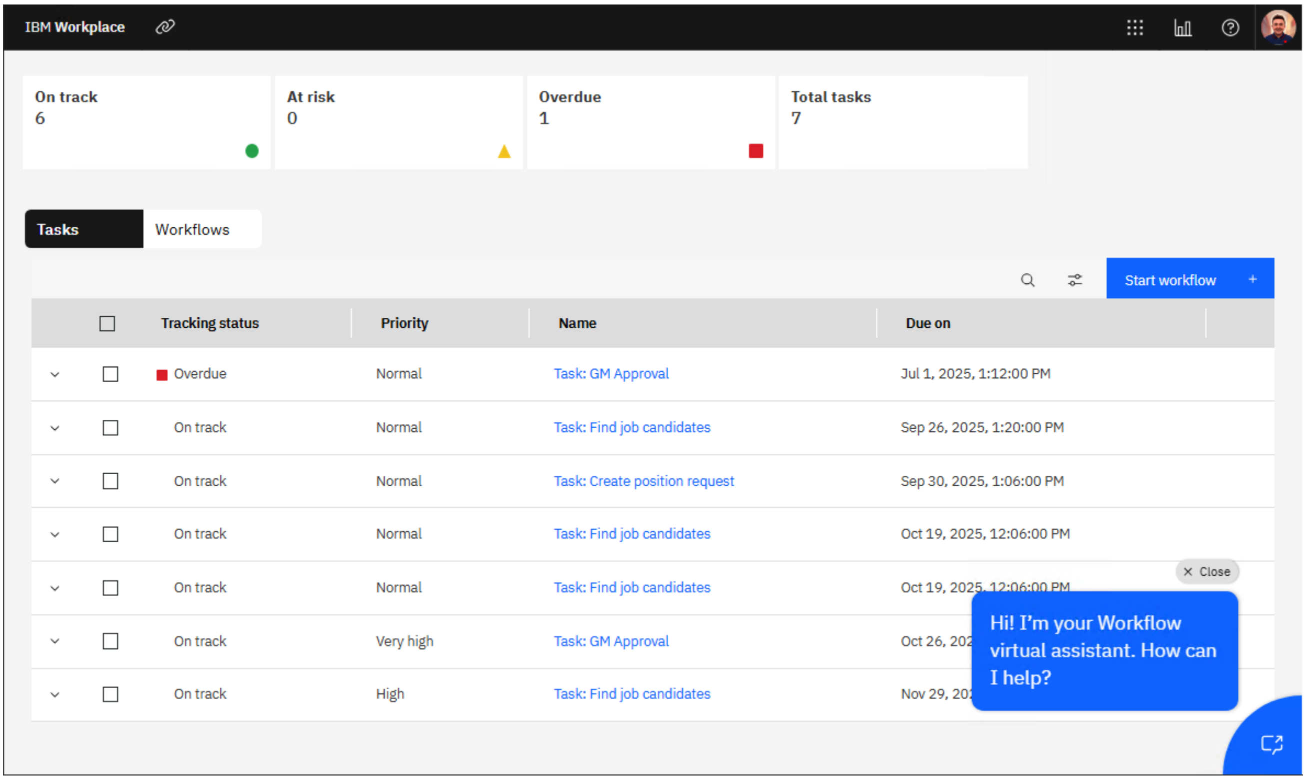
_2. From the Web browser toolbar, select the **BAW > Workplace.**.



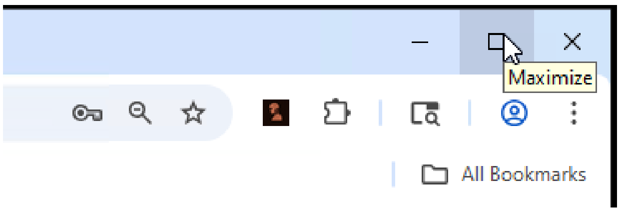
_3. For Username, enter **'Jack',** and for password, enter **'passw0rd'**. Then, click **Log In**.



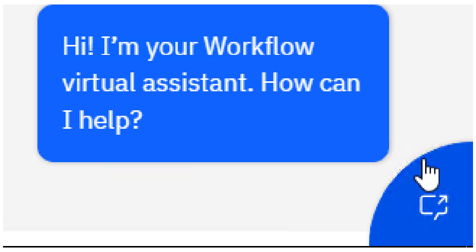
_4. You should now see seven user tasks.



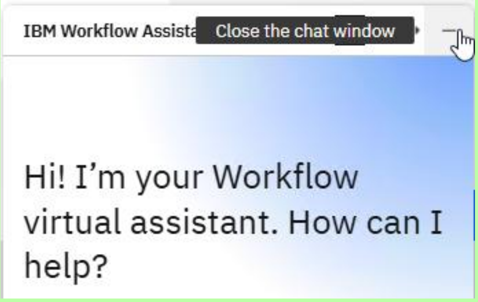
_5. Click the **Maximize** icon.



_6. Click the **IBM Workflow Assistant** icon in the lower right corner to open the Workflow Assistant.



Note: If you need more view space you can close the Assistant by clicking here:

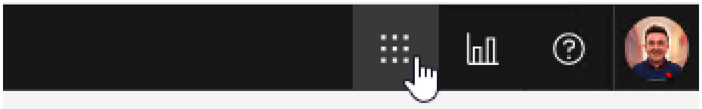


2.5 Team Actions

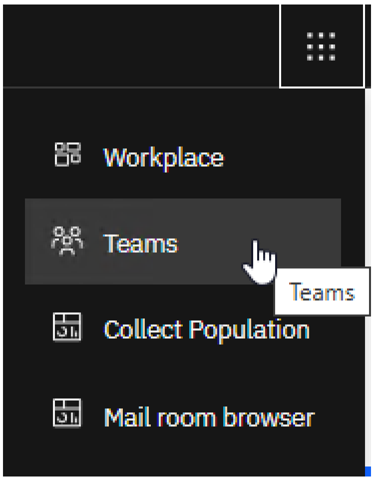
As a team manager, you can use the Assistant to view all the teams that you manage and also understand and manage their workload.

2.5.1 Open Team Dashboard

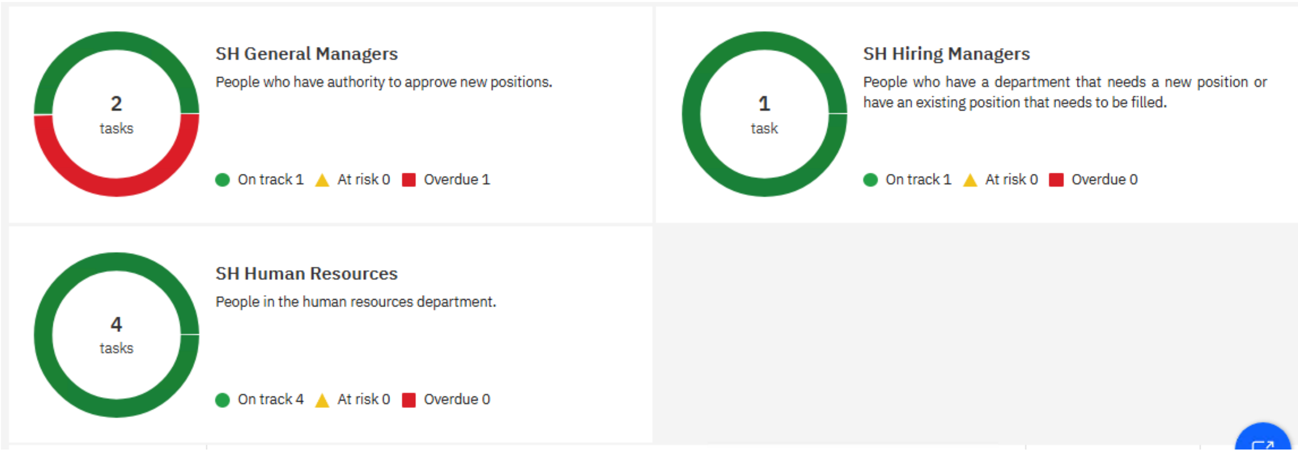
_7. Click the **Dashboard Selection** icon in the top right corner.



_8. Click the **Teams** dashboard.



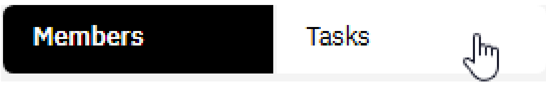
_9. Note that Jack manages three teams, and the Teams view displays the tasks and their status for all three teams managed by Jack.



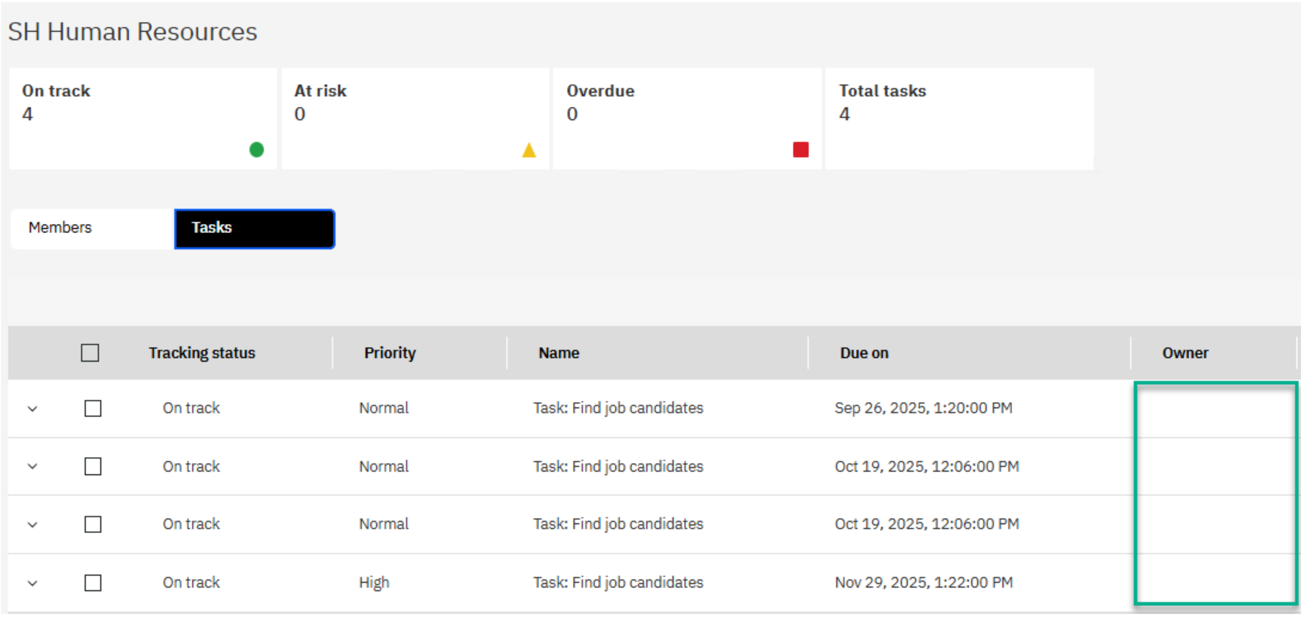
2.5.2 Select a Team

_1. Select **SH Human Resources** team

_2. Click the **Tasks** button.

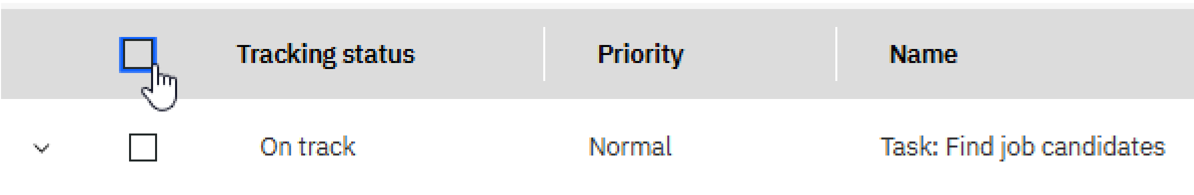


_3. Note that the tasks for the SH Human Resources team have no owner.



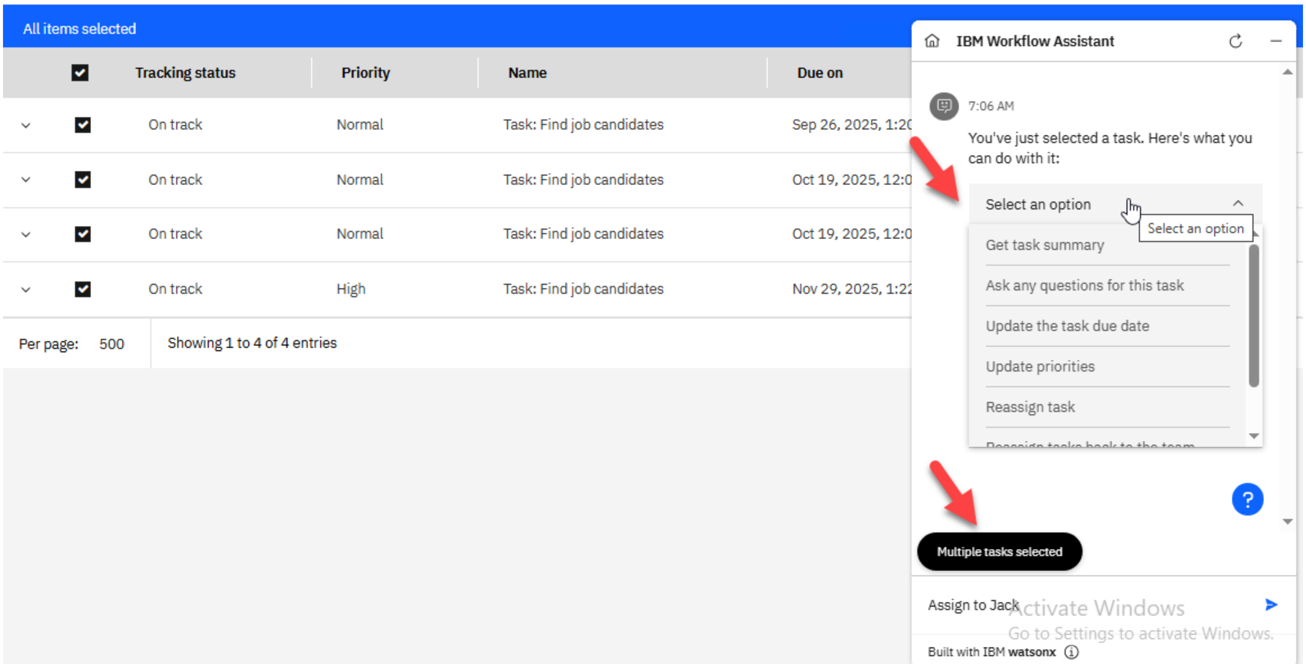
2.5.3 Ask the Assistant to Assign Tasks to Jack

_1. Click the checkbox on the title bar of the Tasks table to select all tasks.



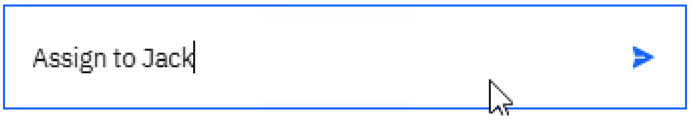
_2. Note that now all tasks are selected, and the prompt of multiple tasks selected comes in the Assistant.

The Assistant understands that multiple tasks are selected and provides actions you could select in the Select an option dropdown.

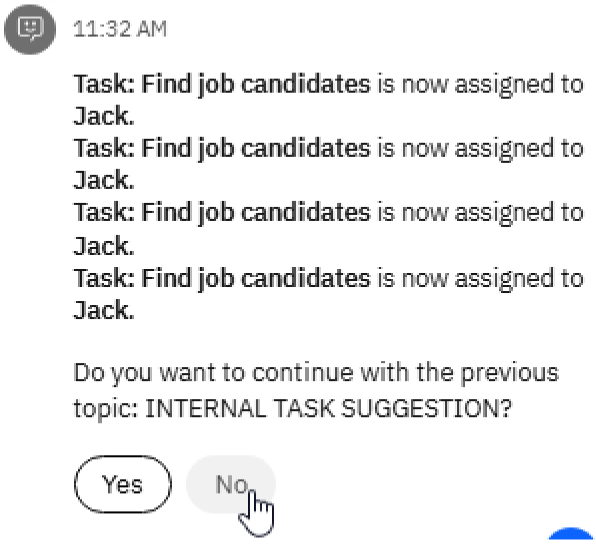


Alternatively, rather than selecting the *Reassign task* option, we could also ask the Assistant directly to reassign tasks. Let's do this in the next step.

_3. In the Assistant's prompt, type **Assign to Jack** and press the **Enter key.**



_4. Click the **No** button - we are done working on tasks.

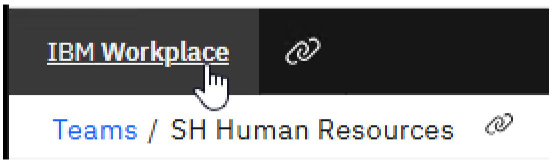


_5. Note that it appears the Assistant assigned all the tasks to Jack.

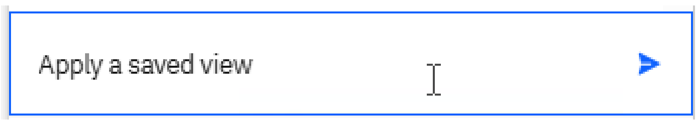
	☐	Tracking status	Priority	Name	Due on	Owner
⌄	☐	On track	Normal	Task: Find job candidates	Sep 26, 2025, 1:20:00 PM	Jack
⌄	☐	On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Jack
⌄	☐	On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Jack
⌄	☐	On track	High	Task: Find job candidates	Nov 29, 2025, 1:22:00 PM	Jack

2.6 Task Actions

_1. Click **IBM Workplace** to switch back to the Workplace Dashboard.



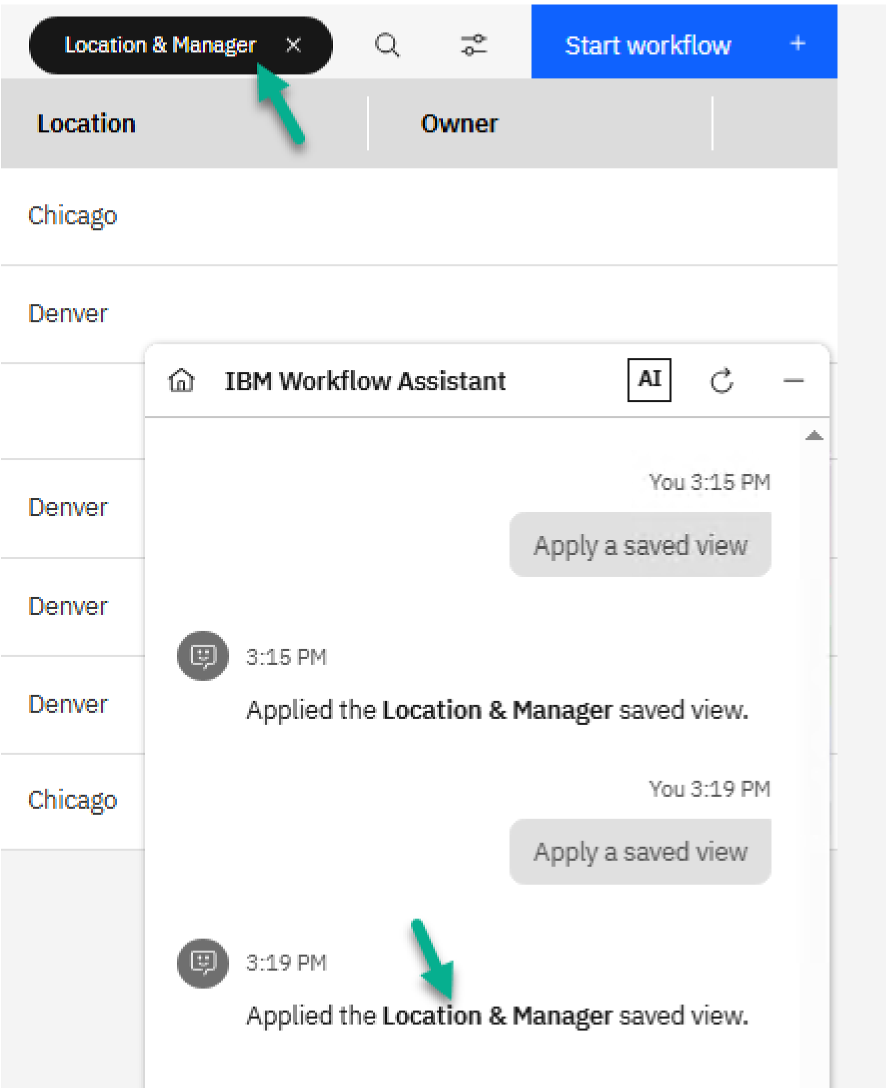
_2. In the Assistant's prompt, type **Apply a saved view** and press the **Enter key.**



Note: Since we only have one saved view (Location & Manager), the Assistant will apply that view and not ask us to select from a list of view options.

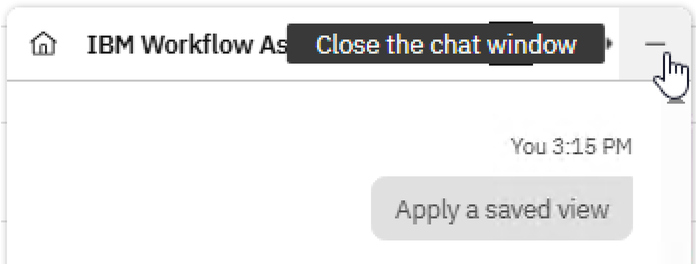
_3. You should now see the *Location & Manager* saved view applied.

Note: If you do not see the Saved View applied, repeat the prompt.



Note that the Assistant applied the Location & Manager saved view. If there were more than one saved view, the Assistant would have listed them all and asked you to select one.

_4. Click the **Close button** to close the Chat Window.



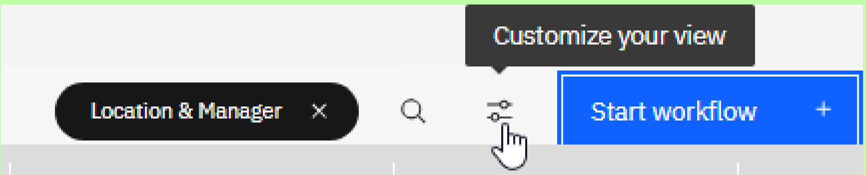
_5. Let's examine the Tasks View.

Tracking status	Priority	Name	Due on	Hiring Manager	Location	Owner
Overdue	Normal	Task: GM Approval	Jul 1, 2025, 1:12:00 PM	Glen Morangie	Chicago	
On track	Normal	Task: Find job candidates	Sep 26, 2025, 1:20:00 PM	Laga Vulin	Denver	Jack
On track	Normal	Task: Create position request	Sep 30, 2025, 1:06:00 PM			
On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Johnnie Walker	Denver	Jack
On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Glen Morangie	Denver	Jack
On track	Very high	Task: GM Approval	Oct 26, 2025, 12:06:00 PM	Laga Vulin	Denver	
On track	High	Task: Find job candidates	Nov 29, 2025, 1:22:00 PM	Johnnie Walker	Chicago	Jack

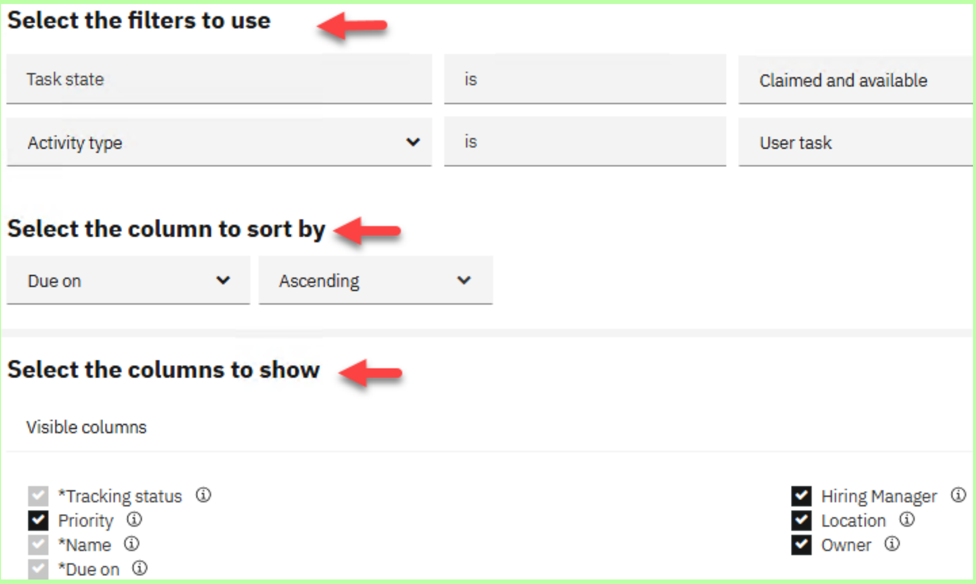
Note that:

- We see tasks from the started instances of the Smart Hiring process.
- Some tasks have owners. Recall that as the Team Manager, you assigned four tasks to Jack.
- The business data of the Smart Hiring porcess is shown: Hiring Manager and Location.

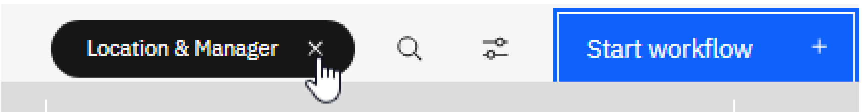
Note: If you want to examine the Saved View, you can click the **Customize your view** button to open the Saved View.



Notice the filters, sort criteria, and column selection:



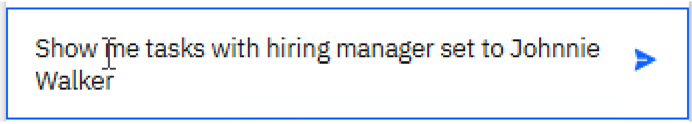
_6. Click **x** to remove the Saved View.



2.6.1 Filter Tasks by Business Data

_1. Click the **IBM Workflow Assistant** icon in the lower right corner to open the Workflow Assistant.

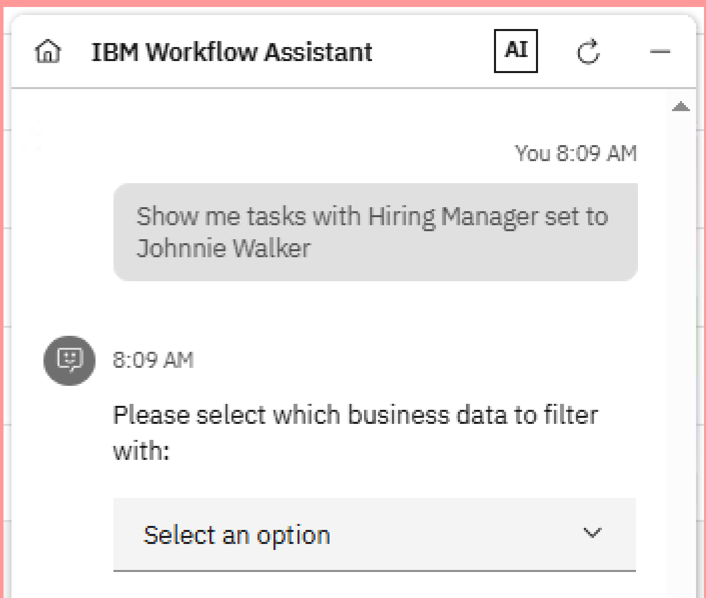
_2. In the Assistant's prompt, type "**Show me tasks with Hiring Manager set to Johnnie Walker**" and press the **Enter key.**



_3. You should now see the *Location & Manager* saved view applied.

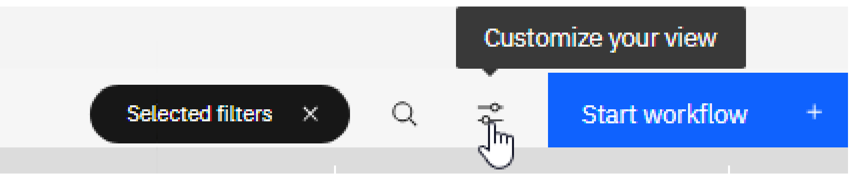
		Tracking status	Priority	Name	Due on	Hiring Manager
		On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Johnnie Walker
		On track	High	Task: Find job candidates	Nov 29, 2025, 1:22:00 PM	Johnnie Walker

Note: If you do not see ***Location & Manager* saved view applied**, and see this instead,

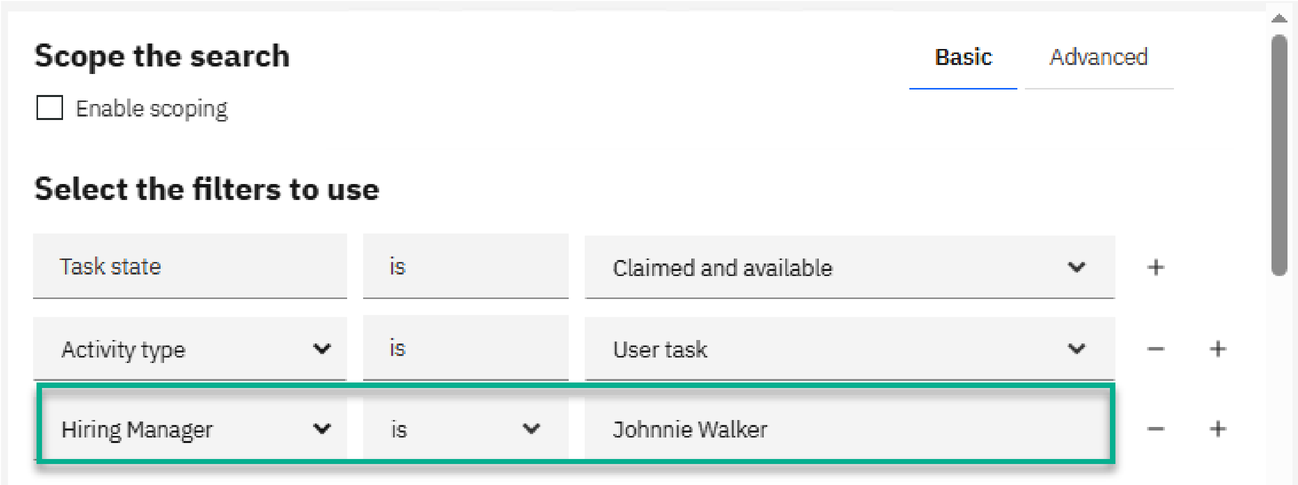


Repeat the prompt: **Show me tasks with Hiring Manager set to Johnnie Walker**

_4. Click the **Customize your view icon**.

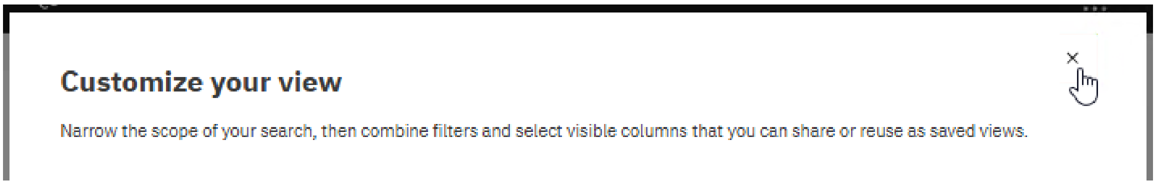


_5. Note that the Assistant has added a filter to your view that reflects your intent. Without the Assistant's help, you would have to add this filter manually.



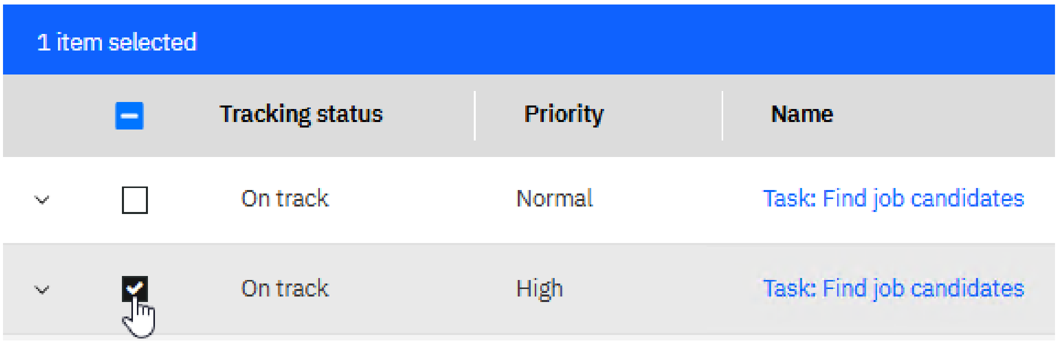
Note: You used the task "business data" to create a filter. Similarly, you could use process business data, such as tasks' "tracking status", for example, you could say "Which tasks are at risk?".

_6. Click **X** to close the *Customize your view* window.

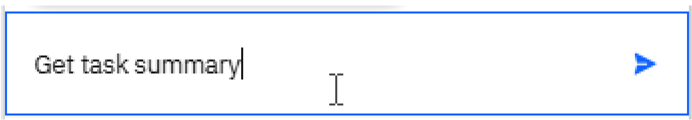


2.6.2 Gettting Task's Summary

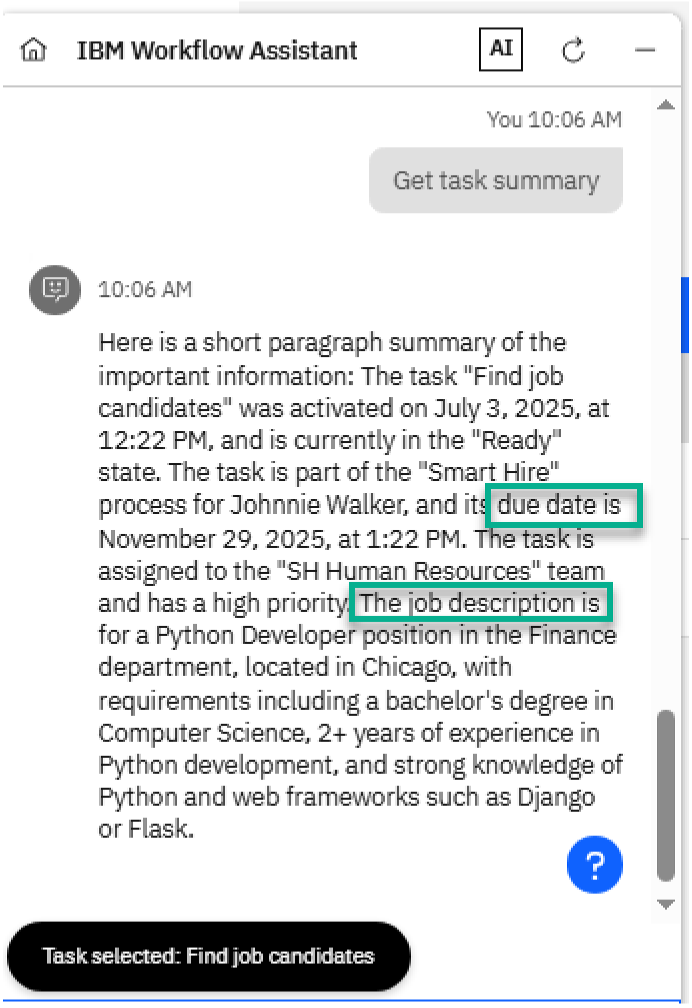
_1. Select the **second task**.



_2. In the Assistant's prompt, type "**Get task summary**" and press the **Enter key.**

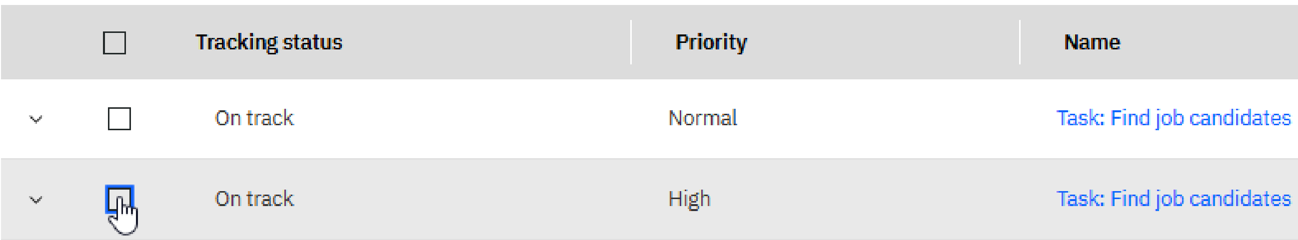


_3. You should now see the task's summary, which combines business data, such as the **job description**, with system data, including the **due date**.

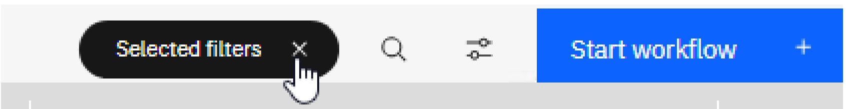


Note: the content returned by the LLM powering this query may differ slightly from the screenshot above.

_4. Unselect the **second Task**.



_5. Click **X** to remove **Selected filters.**



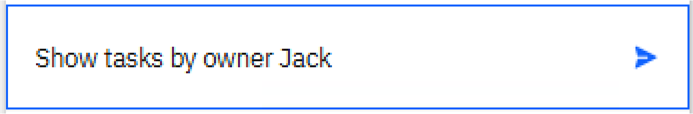
2.6.3 Prioritizing Tasks

If you ask the Assistant to prioritize tasks, the Assistant opens the next most important task for you. The Assistant prioritizes tasks that you have already claimed first. If you haven't claimed any tasks yet, it automatically claims the next best task for you.

> Note: If AI-based task prioritization (see Prioritizing work.) is enabled, the Assistant opens your next best task based on the prediction of the next best task model. Similarly, it prioritizes amongst the tasks that you have already claimed, but if you haven't claimed any tasks, it automatically claims the next best task for you.

2.6.3.1 Show Tasks Available to Jack

_1. In the Assistant's prompt, type "**Show tasks by owner Jack"** and press the **Enter key.**



_2. You should now see the tasks that, as the Team Manager, you assigned to Jack.

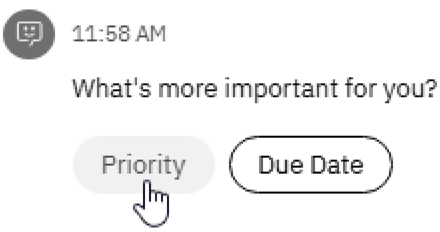
Tracking status	Priority	Name	Due on	Owner
On track	Normal	Task: Find job candidates	Sep 26, 2025, 1:20:00 PM	Jack
On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Jack
On track	Normal	Task: Find job candidates	Oct 19, 2025, 12:06:00 PM	Jack
On track	High	Task: Find job candidates	Nov 29, 2025, 1:22:00 PM	Jack

Note that the fourth task has the highest priority – "High". Most likely, the Assistant will select and open this task for Jack!

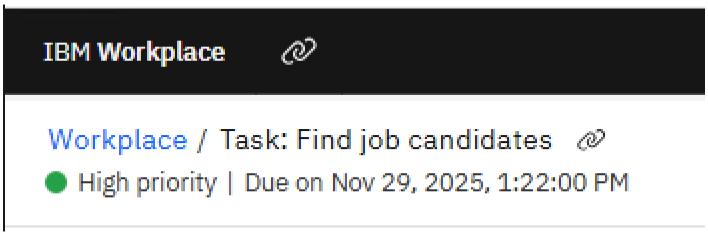
2.6.3.2 Ask the Assistant to Open Next Best Task

_1. In the Assistant's prompt, type "**Open the next best task"** and press the **Enter key.**

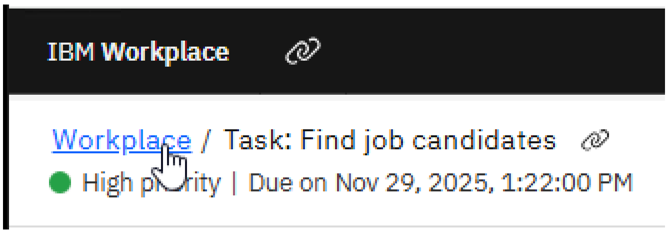
_2. Select Priority.



_3. Note that, as expected, the Assistant opened the task for Jack with "High priority" – the fourth task in the list.



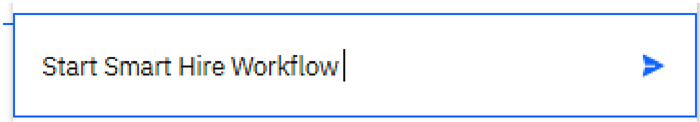
_4. Click the **Workplace** link to return to the Task List, as we will not be completing this task.



2.7 Start Actions

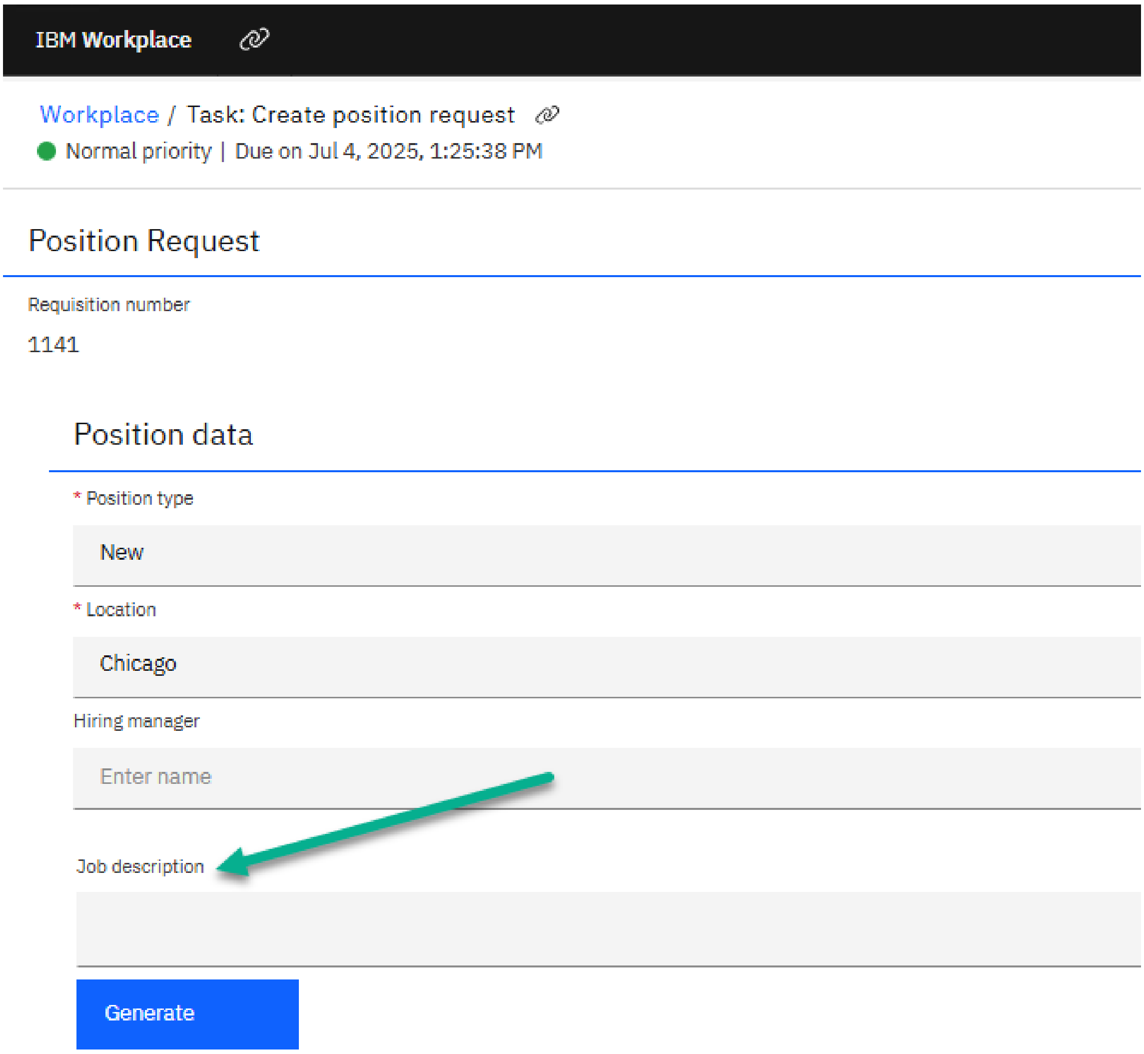
2.7.1 Start a Smart Hire Workflow Instance

_1. In the Assistant's prompt, type **Start Smart Hire Workflow** and press the **Enter key.**



Note: We could also say "Start Workflow," in which case the Assistant would show us a list of available Workflows to start.

_2. You should now see a form open to complete the "Create position request" task



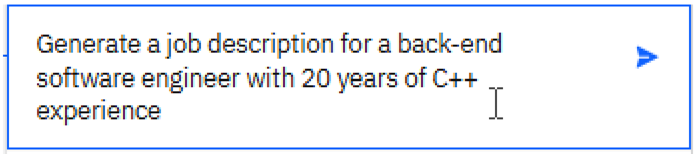
Note the "Job description" entry field. You will learn in the following steps how to get help to generate a job description from:

(1) Use the Generate button configured to use the Gen AI Workflow capabilities, or

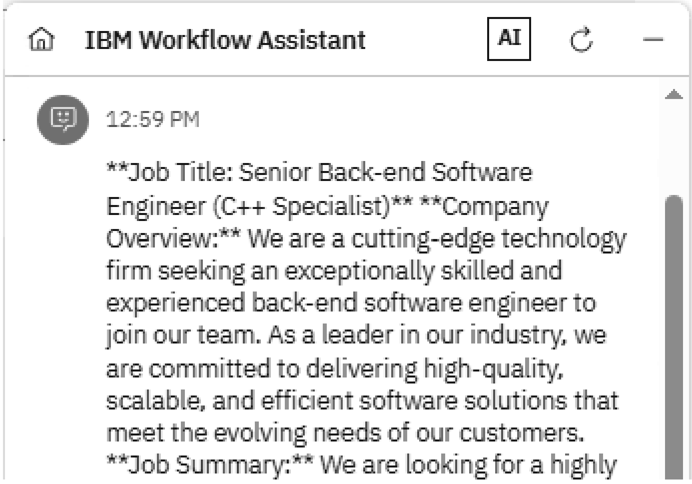
(2) Ask the Workflow Assistant!

2.7.2 Get Assistance in Completing the Task from the Assistant

_1. In the Assistant's prompt, type **"Generate a job description for a back-end software engineer with 20 years of C++ experience"** and press the **Enter key.**

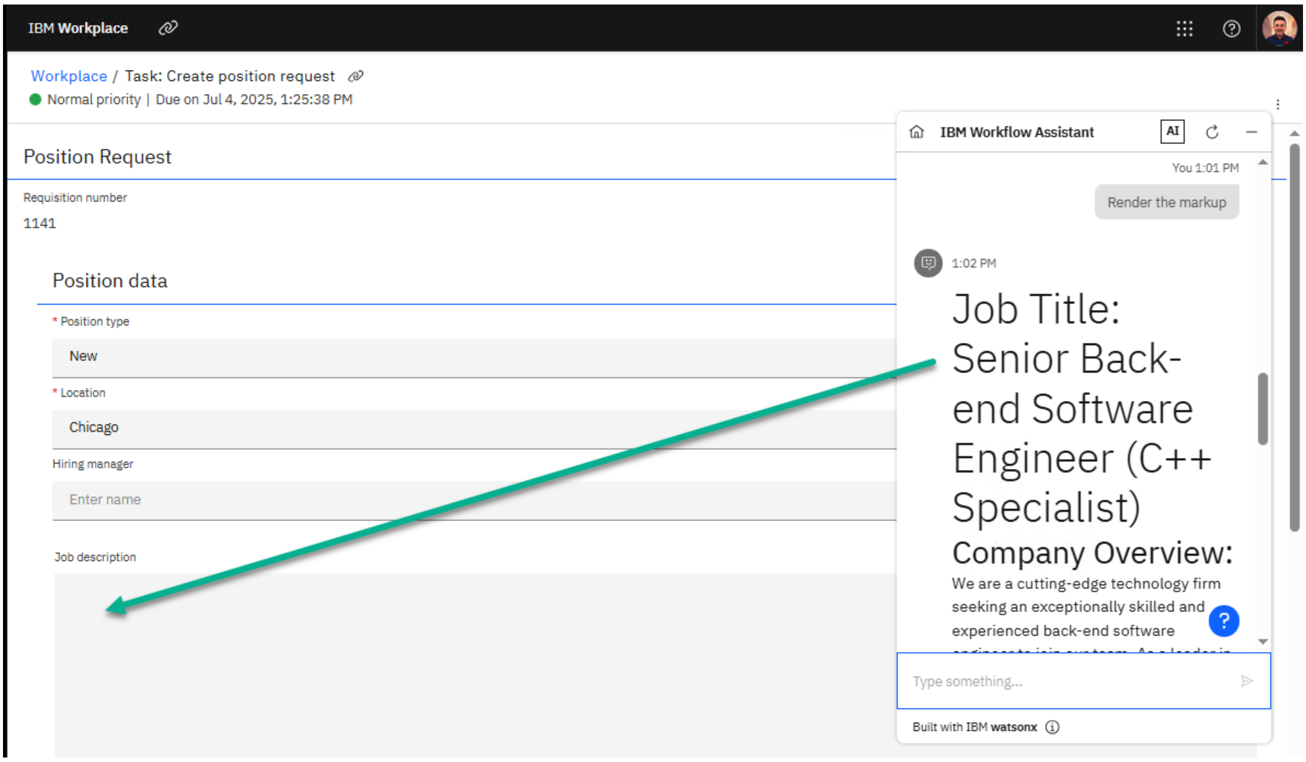


_2. Note that the answer came back with **markup** tags.



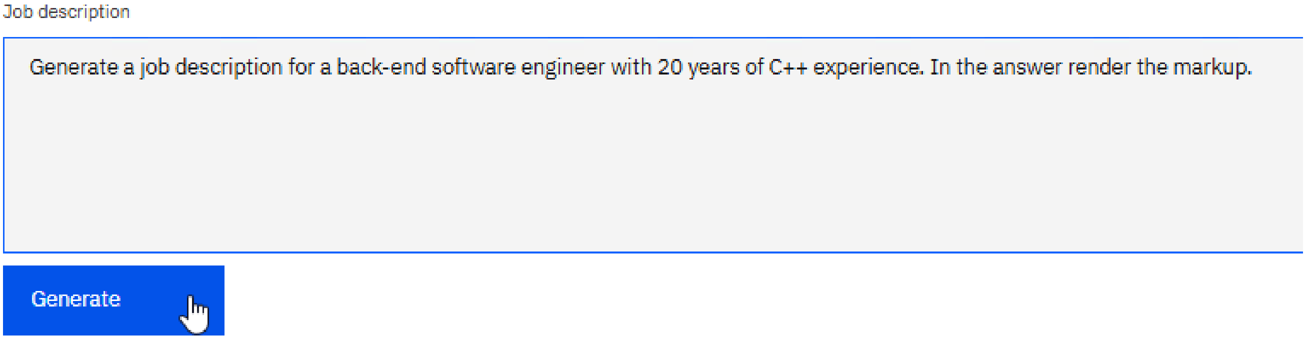
_3. In the Assistant's prompt, type **"Render the markup"** and press the **Enter key.**

_4. Note that the Job description is now formatted. You could now copy and paste it into the Job description field.

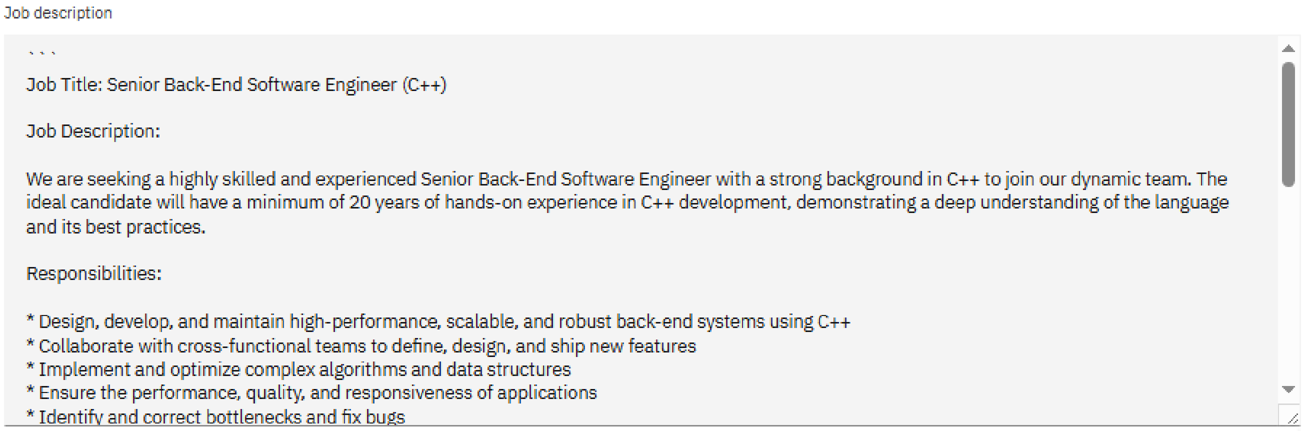


2.7.3 Get Assistance in Completing the Task from the Workflow Gen AI Capability

_1. In the *Job description* field, type **"Generate a job description for a back-end software engineer with 20 years of C++ experience. In the answer, render the markup."** and press the **Generate** button.



_2. Verify that the Job description looks similar to this:



This marks the end of the lab.

Notices and disclaimers

Notices and disclaimers (Continued)