

Use Gen AI to Identify and Validate Documents

Instructor-led lab guide



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1 Lab Introduction

This hands-on lab explores IBM Business Automation Workflow (BAW) enhanced by Generative AI (GenAI) to streamline business processes and improve decision-making. Participants will gain practical experience integrating GenAI capabilities into workflows to automate content generation, enhance decision logic, and optimize task management. In this lab, attendees will learn how to leverage AI-powered intelligent documents within IBM BAW.

1.1 Lab Scenario

In this lab, you will complete the implementation of a Human Task Activity (highlighted in green in the figure below), which is part of a procurement Process.

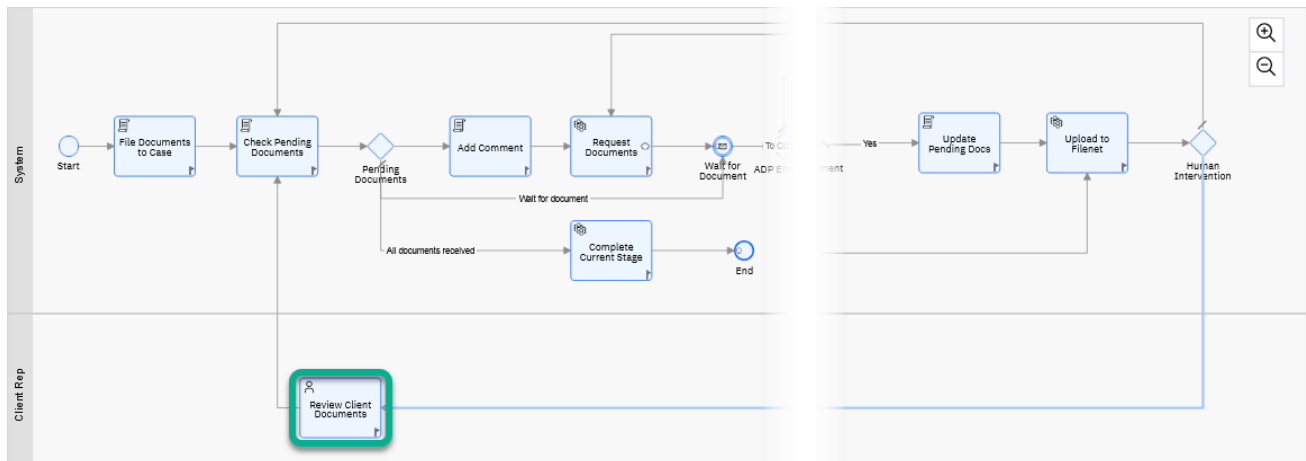


Figure 1. Client Onboarding Case: Review Documents Process

In this activity, a client onboarding specialist must review and validate the client documents. In this lab, you will create an automation that uses LLM to assist the client onboarding specialist. The LLM will automatically classify and summarize the document.

2 Lab Instructions

_1. Use this link to download the **wxO Agent Builder ADK Orchestrate** document: <https://ibm.ent.box.com/v/wxO-Agentic-SDK>. You may need it when provisioning the environment on your own, and later on when starting the VMs

2.1 Acquire Tech Zone Lab Environment

You can either request a Tech Jam Workshop Tech Zone environment ([2.1.1](#)) or provision your own ([2.1.2](#)).

2.1.1 Request Tech Jam Workshop Tech Zone Environment

- _1. Request an environment using this Slack channel [#ba-wxo-tech-jam-access](#)
- _2. You will receive a URL and a private password/access code.
- _3. Use the URL to access your Tech Jam lab VMs.

2.1.2 Reserve an "IBM watsonx Orchestrate ADK and DBA" Environment

- _1. Find section "1.1 Reserve Tech Zone Environment" in **wxO Agent Builder ADK Orchestrate** document.
- _2. Create an **IBM watsonx Orchestrate ADK and DBA** Tech Zone reservation.

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

2.2 DBA-4-2022 VM Setup

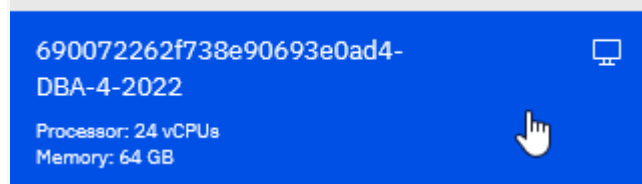
- _1. Find section "1.3.1.2 Create a Remote Desktop Session" in the **wxO Agent Builder ADK Orchestrate** document.
- _2. Open the VM using either the Console or the Remote Desktop method (described in "1.3.1.2 Create a Remote Desktop Session")

Note:

The Console method access will vary depending if you are using a Workshop or your own Tech Zone Reservation.

Workshop:

VM Remote Console:



Your Own Tech Zone Reservation:

Virtual Machines

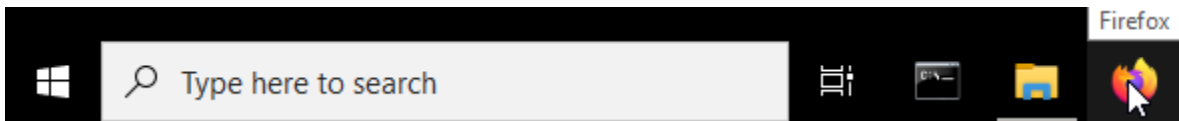
Name	OS	IP	Status	
68eff80d926501b4673f452a-DBA-4-2022	Microsoft Windows Server 2022 (64-bit)	10.0.0.6	Running	Console
68eff80d926501b4673f452a-WxO-Lite-TechJam	Microsoft Windows Server 2022 (64-bit)	10.0.0.2	Running	Console

- _3. Find section "1.3.2 Start IBM Business Automation Workflow Server" in the **wxO Agent Builder ADK Orchestrate** document.

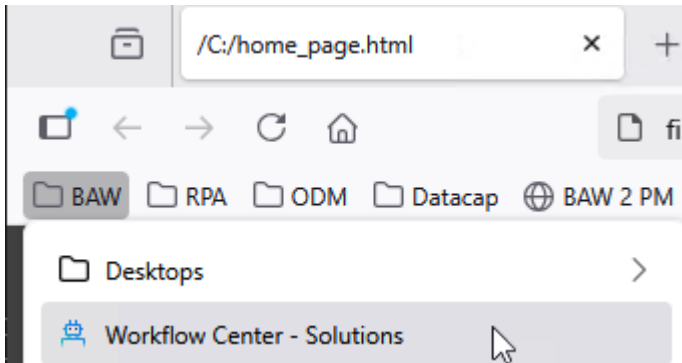
_4. Start the BAW Server as described in "**1.3.2 Start IBM Business Automation Workflow Server**".

2.3 Open Web Process Designer

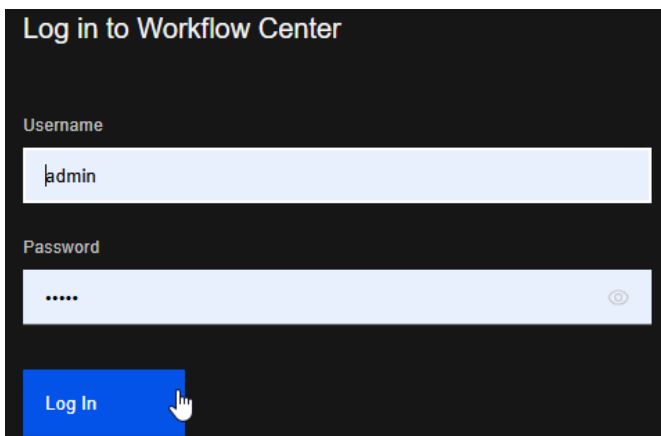
_1. Start the **Firefox** Web Browser.



_2. From the Web browser toolbar, select the **BAW > Workflow Center - Solution**.

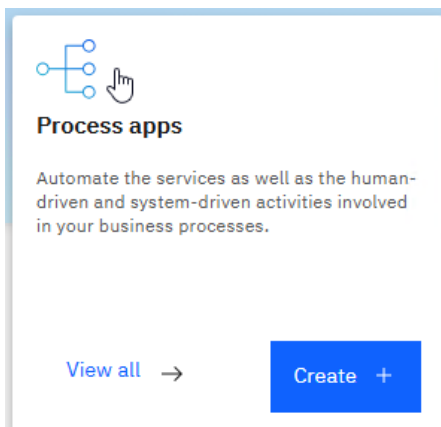


_1. For Username, enter '**admin**', and for password, enter '**admin**'. Then, click **Log In**.

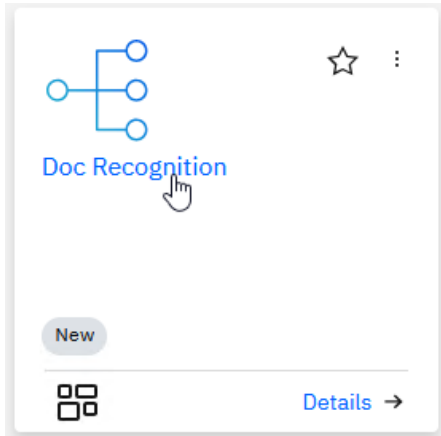


2.4 Open Process App

_1. Click **Process apps**.




_2. Click **Doc Recognition**.



2.5 Author GenAI Service Flow

You will now create a Service Flow with a GenAI Activity to assist knowledge workers in verifying and summarizing customer-submitted documents during the onboarding process.

For example, given a utility bill, Gen Ai will classify and summarize it as shown below.

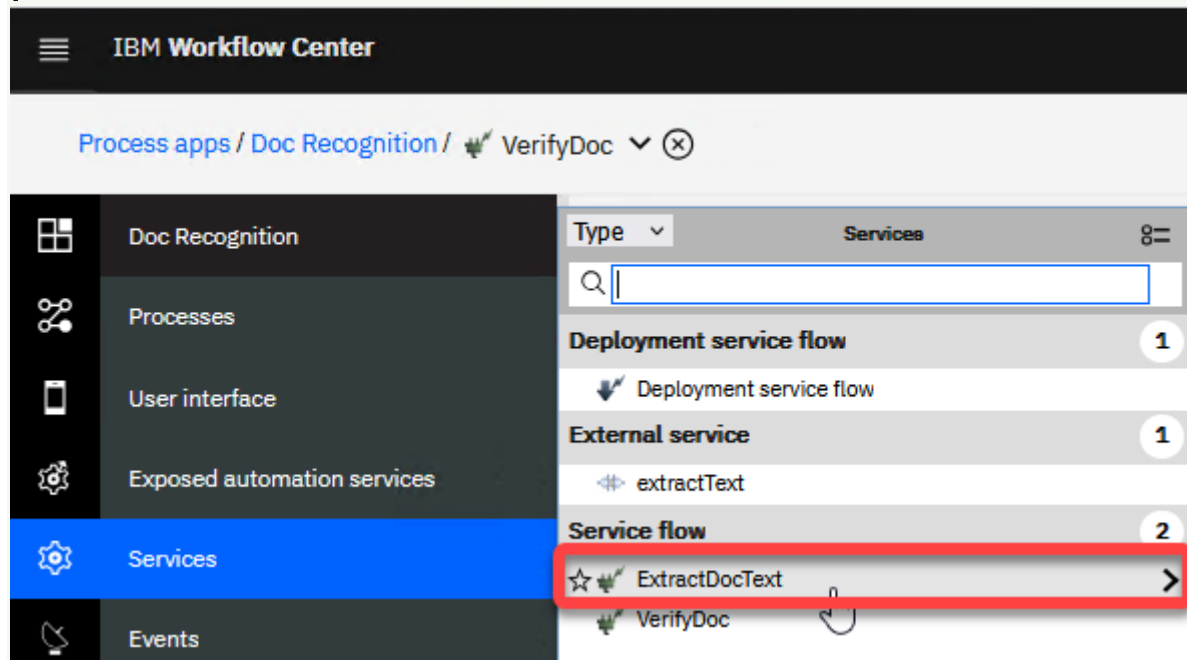
Digital Document	Verification and Summarization by Gen AI
	<p>This document is a Bill.</p> <p>Summary:</p> <ul style="list-style-type: none"> * Company: Automation Elite * Address: 3974 Carson St, Lansing, MI 48911 * Dates: <ul style="list-style-type: none"> + Bill Period: 04-01-2022 - 05-01-2022 + Bill Due On: 05-05-2022

The Gen AI Activity you will create shortly will use a one-shot prompt (no training) to enable it to summarize and classify three types of documents: Utility Bills, Back Statements, and Annual Reports.

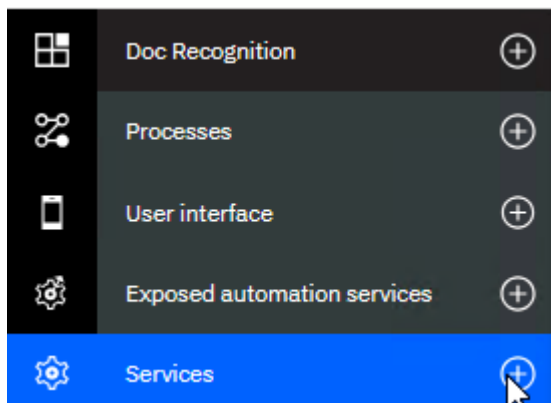
2.5.1 Create Service Flow

You will create a Service flow that, given a text extracted from a digital document, will classify and summarize it.

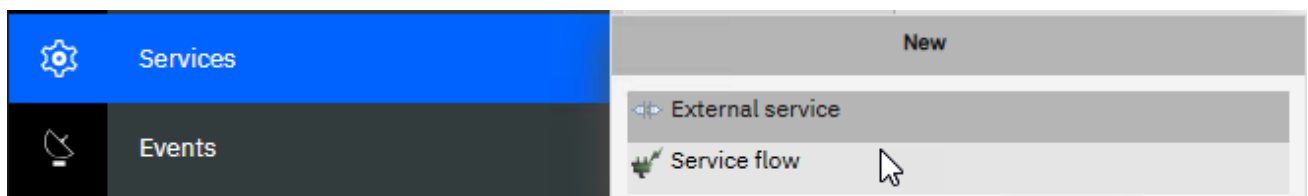
Note that we have already created a solution Service Flow for you. You can use it as a reference.



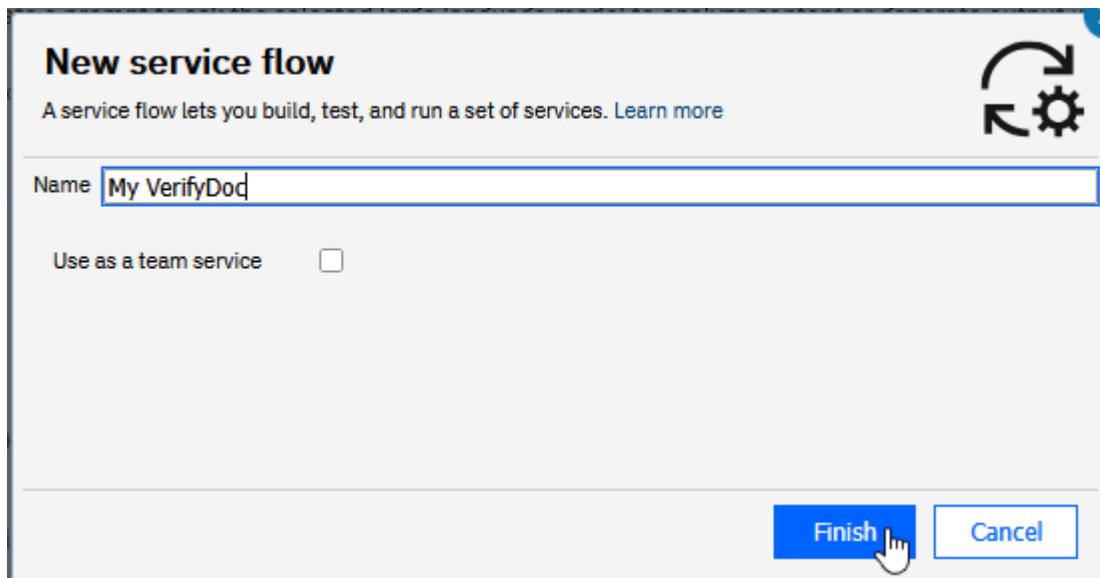
_1. Click the + on **Services**.



_2. Click **Service flow**.

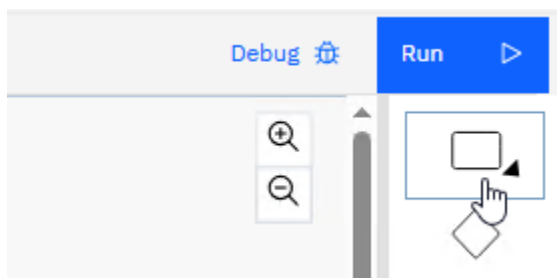


_3. Enter **My VerifyDoc** and click **Finish**.

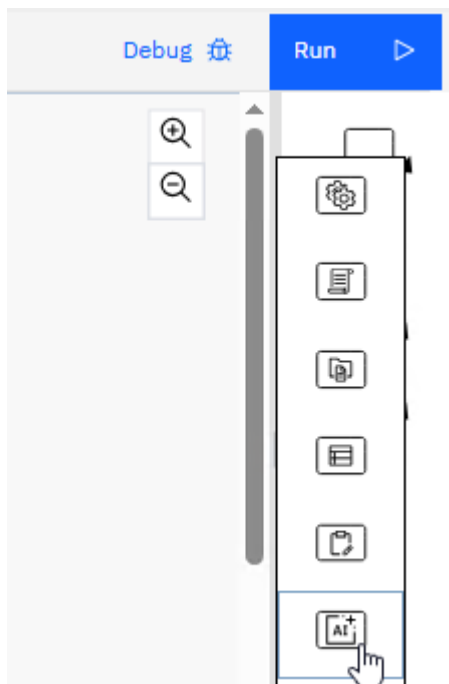


2.5.2 Add GenAI Activity

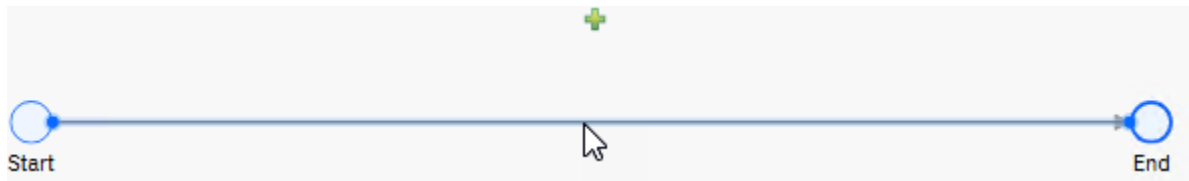
_1. Click the **Activity** palette.



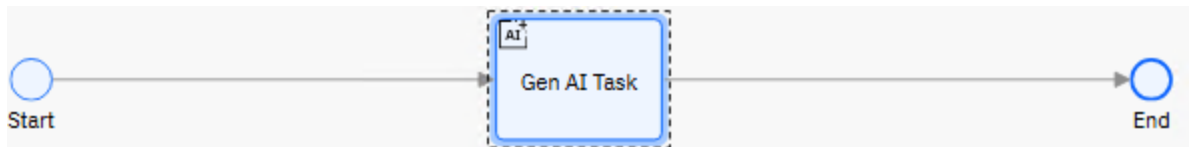
_2. Select the **Generative AI** activity.



_3. While holding the left mouse button, **drag and drop** it onto the wire between the Start and End nodes.

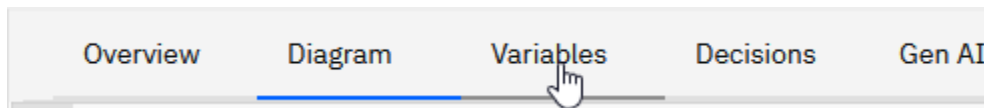


_4. Ensure the Gen AI Task AI Activity has been added as shown below:

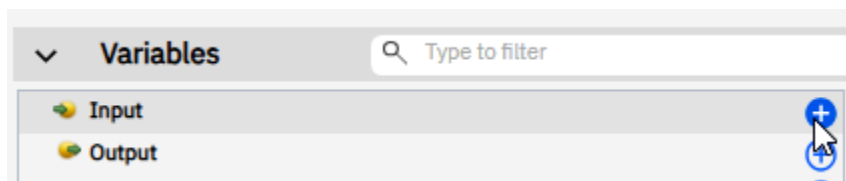


2.5.3 Create Service Flow Variables

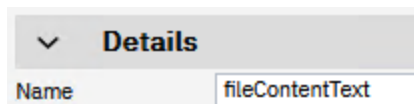
_1. Click the **Variables** tab.



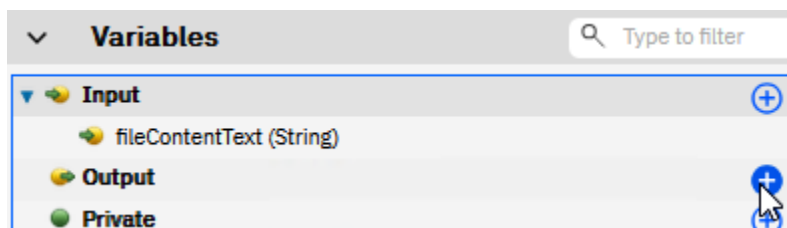
_2. Click the **+** icon on the input.



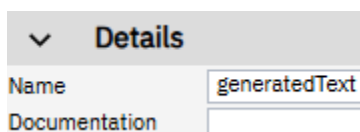
_3. For *Name*, enter **fileContentText**



_4. Click the **+** icon on the *output*.

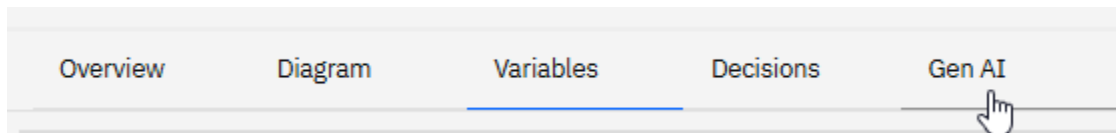


_5. For *Name*, enter **generatedText**.

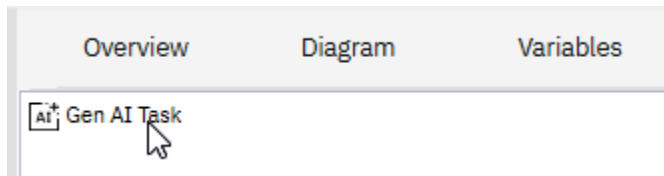


2.5.4 Author the GenAI Activity

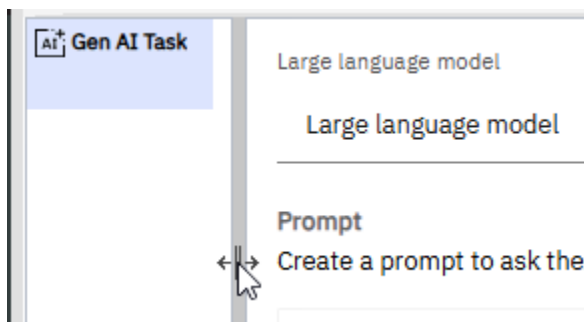
_1. Click the **Gen AI** tab.



_2. Click **Gen AI Task**.



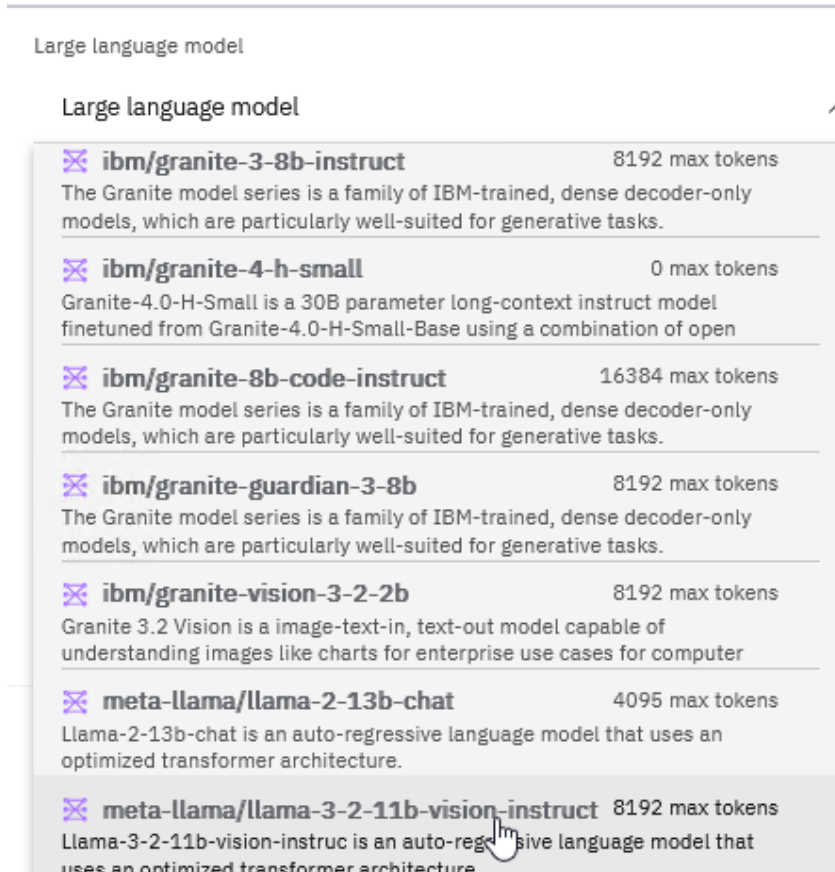
_3. **Capture the divider and drag it to the left** to expand the Gen AI Editor.



2.5.5 Select the LLM


The IBM Business Automation Workflow is connected to an IBM watsonx.ai instance, which provides a selection of LLMs.

_1. From the Large language model dropdown, select **meta-llama/llama-3-2-11b-vision-instruct**.



_2. Verify that the **meta-llama/llama-3-2-11b-vision-instruct** is your LLM.

Large language model

 meta-llama/llama-3-2-11b-vision-instruct

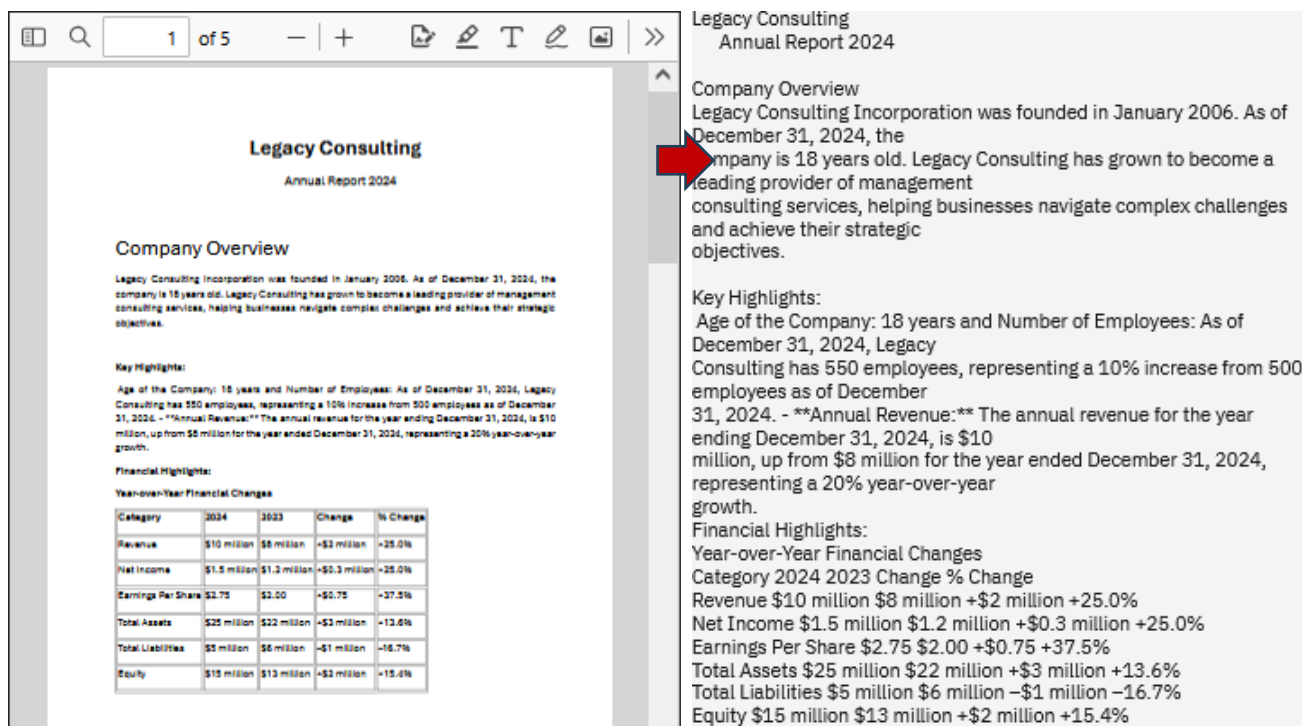
Why did we choose this LLM over another?

The Meta-Llama 3.2-11B-Vision-Instruct model is a multimodal instruction-tuned LLM that can process both text and images. It excels at visual question answering, image captioning, document analysis, and multimodal chat — any scenario where understanding and reasoning over images (with or without accompanying text) is required. It has ~11 billion parameters and supports long-context reasoning (up to ~128K tokens).

However, in this lab, to conserve the precious tokens, we will not supply raw images as the input to this model. Instead, we will first extract text from the image and use it as the input.

2.5.6 Create Input to LLM

The input variable will provide the LLM with the text extracted from the PDF quote file.



Legacy Consulting
Annual Report 2024

Company Overview

Legacy Consulting Incorporation was founded in January 2006. As of December 31, 2024, the company is 18 years old. Legacy Consulting has grown to become a leading provider of management consulting services, helping businesses navigate complex challenges and achieve their strategic objectives.

Key Highlights:

Age of the Company: 18 years and Number of Employees: As of December 31, 2024, Legacy Consulting has 550 employees, representing a 10% increase from 500 employees as of December 31, 2023. - **Annual Revenue:** The annual revenue for the year ending December 31, 2024, is \$10 million, up from \$8 million for the year ended December 31, 2023, representing a 20% year-over-year growth.

Financial Highlights:

Year-over-Year Financial Changes

Category	2024	2023	Change	% Change
Revenue	\$10 million	\$8 million	+\$2 million	+25.0%
Net Income	\$1.5 million	\$1.2 million	+\$0.3 million	+25.0%
Earnings Per Share	\$2.75	\$2.00	+\$0.75	+37.5%
Total Assets	\$25 million	\$22 million	+\$3 million	+13.6%
Total Liabilities	\$5 million	\$6 million	-\$1 million	-16.7%
Equity	\$15 million	\$13 million	+\$2 million	+15.4%

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Financial Highlights:

Year-over-Year Financial Changes

Category 2024 2023 Change % Change

Revenue \$10 million \$8 million +\$2 million +25.0%

Net Income \$1.5 million \$1.2 million +\$0.3 million +25.0%

Earnings Per Share \$2.75 \$2.00 +\$0.75 +37.5%

Total Assets \$25 million \$22 million +\$3 million +13.6%

Total Liabilities \$5 million \$6 million -\$1 million -16.7%

Equity \$15 million \$13 million +\$2 million +15.4%

_1. Click **Add variables +** in the Variables section.

Variables

Add variables that you can use in your prompt. T



No variables

Select and add variables to use in your prompt.

Add variables  **+**

_2. From the dropdown, select **"fileContentText"** and then click **"Add."**

Add variables

Add variables that you can use in your prompt.

1 x Select the variables to add

☒ fileContentText

☐ generatedText

Cancel Add

_3. In the **Value** column, enter the following text for the quote Variable.

Banking Information Focus Corp This banking information provided here will be used by Focus Corp to withdraw the monthly services fee. Client Name Automation Elite Inc. Bank Name The Digital Bank Bank Phone Number +1-289-333-1234 Bank Address 2190 New Orchard Road, Armonk, New York - 10504 Routing Number 91373084 Account Number 1179476345 Account Type Checking Savings Other By submitting this form, you authorize Focus Corp to withdraw the monthly services fee from he specified bank account. Date 4/21/2021

Variable	Value
fileContentText	Corp to withdraw the monthly services fee from he specified

2.5.7 Define Prompt Input

You will define the input the LLM will receive every time you call this Service Flow.

_1. In the *Input* section of the Prompt definition, click the **Add variable +** button.

Prompt

Create a prompt to ask the selected large language model to analyze content or generate output in the context of your pr

Context

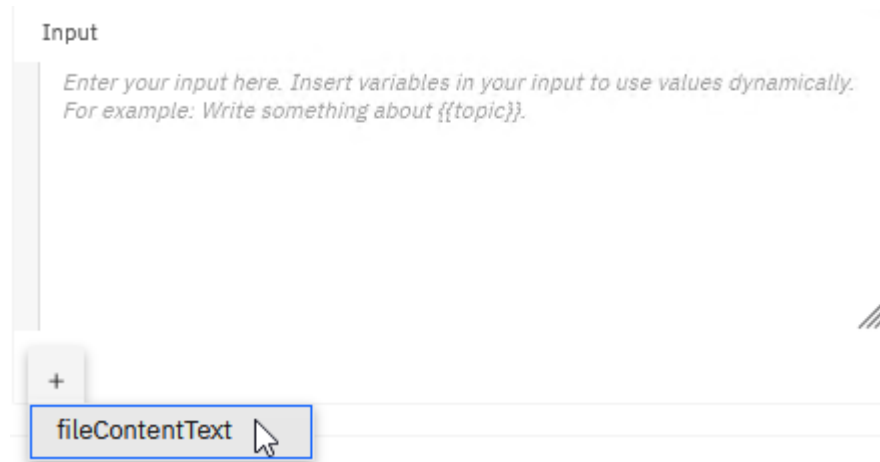
Provide instructions and context to your prompt.
Insert variables in your context to use values dynamically.

Input

Enter your input here. Insert variables in your input to use values dynamically.
For example: Write something about {{topic}}.

Add variable

_2. Select **fileContentText**..

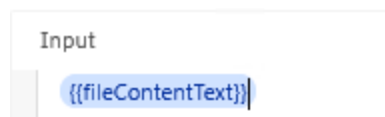


Input

Enter your input here. Insert variables in your input to use values dynamically.
For example: Write something about {{topic}}.

+ fileContentText

_3. You should now see that the input to the LLM is the *fileContentText* variable you will pass to this Service Flow.



Input

{{fileContentText}}

2.5.8 Define Prompt Context

You will define a prompt to instruct the LLM to categorize and summarize a document.

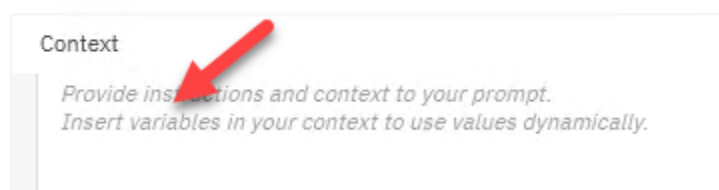
We will use a one-shot prompt with no training examples!

_1. In the **Context** section of the *Prompt* definition, add the **text below**.

Identify the document as Bill, Banking Information, or Annual Report.
Provide a summary of the document, including only the names or company names, addresses, and dates.
Do not include any amounts.

Prompt

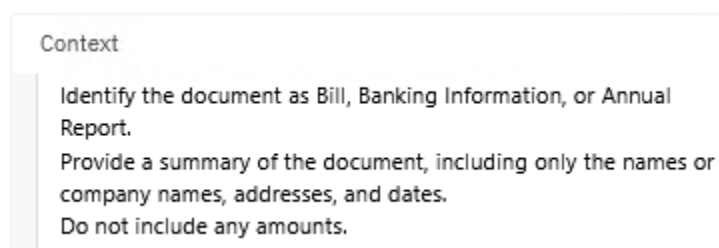
Create a prompt to ask the selected large language model to an:



Context

Provide instructions and context to your prompt.
Insert variables in your context to use values dynamically.

_2. The Context section should look exactly as shown below.



Context

Identify the document as Bill, Banking Information, or Annual Report.
Provide a summary of the document, including only the names or company names, addresses, and dates.
Do not include any amounts.

2.5.9 Define Parameters

To limit the length of the generated output, we can specify the minimum and maximum number of tokens that the LLM can generate from the Parameters pane. In our case, we will need more than the default 50 tokens.

What is a token?

A token is a sequence of characters that holds semantic meaning for a model. Before LLM processing, the words in your prompt text are converted into tokens. Similarly, the raw output from the model is also in the form of tokens. These output tokens are then converted back into words to be displayed as the final result.

Each LLM has a maximum limit on the total number of tokens, which includes both the tokens in the input prompt and the tokens in the generated output. You can view those limits in the LLM descriptions in the Large language model dropdown menu. For more information about tokens, see [Tokens and tokenization](#)

- _1. In the *Parameters* section, for *Maximum generated tokens*, enter **250**.

Parameters ⓘ


Constrain the length of the generated output.

Minimum generated tokens

Maximum generated tokens

2.5.10 Test the Gen AI Task

We can use the default value for the input quote variable to test our Gen AI Task.

Variable	Value	
fileContentText	Corp to withdraw the monthly services fee from he specified	

- _1. Click the **Generate** button.

Parameters ⓘ


Constrain the length of the generated output.

Generate



RAM

_2. You should now see that the document has been correctly identified and labeled as "Banking Information," with the document summary included below.

Generate  **RAW**


Generated output

This is a Banking Information document.

Summary:

- * Client: Automation Elite Inc.
- * Bank: The Digital Bank
- * Address: 2190 New Orchard Road, Armonk, New York - 10504
- * Phone Number: +1-289-333-1234
- * Routing Number: 91373084
- * Account Number: 1179476345
- * Account Type: Checking, Savings, Other
- * Date: 4/21/2021

99 tokens generated in 2.347s. Stop sequence: eos_token

Save as example 

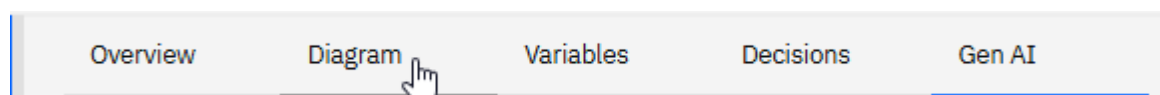
Note the **Save as example** button. If you decide to train the model with a set of documents (multi-shot prompt), you can use it to add this run to the training example section. Also note that 99 tokens were generated, which is why we increased the maximum generated tokens to 250.

2.5.11 Map Gen AI Task Activity to Service Flow Variables

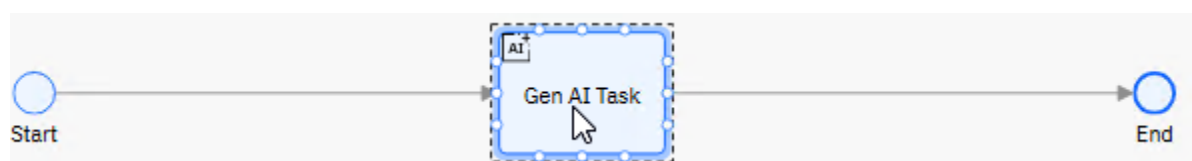
We will map the Gen AI Task output variables to the Service Flow's output variables. This will allow the callers of the Service Flow to interact with the Gen AI Task.

Note that we do not need to map the quote variable explicitly because it has already been associated as input to the Gen AI Task in the Gen AI Editor.

_1. Click the **Diagram** tab.



_2. Select the **Gen AI Task** activity.



_3. Click the **Data Mapping** tab.

General


Implementation


Data mapping

Pre **post**

Common

Name: Gen AI Task

Color: 

Documentation: 

_4. On the *Generated text (string)* variable, click the **variable picker icon**.

_5. Select **generatedText**.

_6. Click the **"Magic Wand"** icon.

_7. Unselect the **"Generated text"** variable and click **Finish**.

Variable creation

Create variables where no matching variable exists. The new variables are automatically mapped. Existing mappings are not overwritten. Existing variables with the same name but different types are omitted.

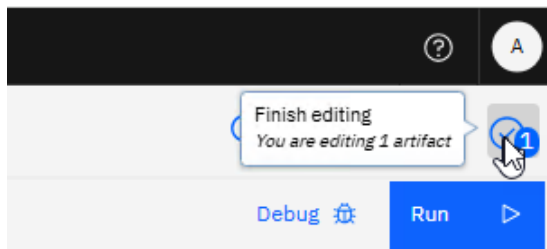
Select the variables to be created and auto-mapped. By default, the variables are created as private variables. To create them as input, output, or input and output variables, select the check box beside the variable.

<input type="checkbox"/>	Variable name	Variable type	Input	Output
<input type="checkbox"/>	Generatedtext	String	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Generatedtokencount	Integer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Inputtokencount	Integer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Stopreason	String	<input type="checkbox"/>	<input type="checkbox"/>

< Back
Next >
Finish
Cancel

This action will create private variables to map the Gen AI Task variables. We can use private variables since they don't need to be mapped as the Output of the Service Flow. The users of the Service Flows are not interested in the internal workings of the LLM!

_8. Click the **"Finish editing" icon** to ensure that all your work is saved.

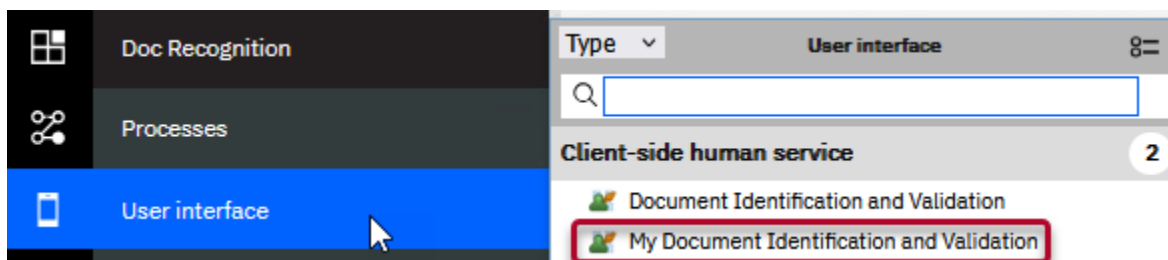


2.6 Add Gen AI Service Flow to Human Task

The Gen AI Service Flow (My Gen AI Document Processing) you just authored is intended for use in the Human Task invoked from the Porcurmente Porcess.

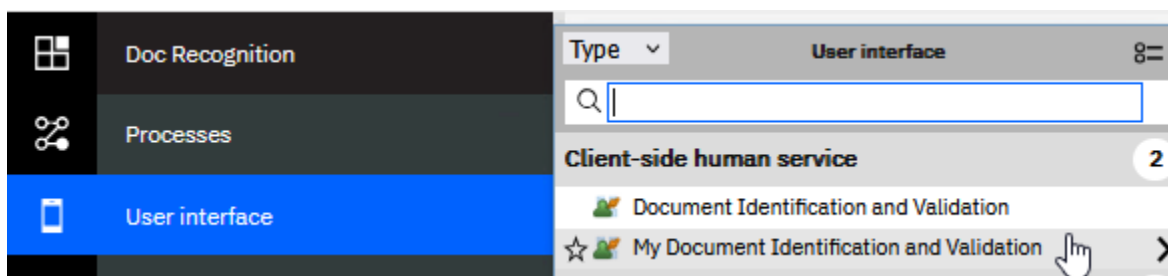
In this lab, we have partially authored the Human Activity (the official term is Client-side Human Service – CSHS) for you. Your task is to add and configure the "My VerifyDoc" Service Flow that you have just authored (My Gen AI Document Processing).

We have also created a partially implemented Human Task Activity for you: *My Document Identification and Validation*. You will need to configure it to invoke the *My VerifyDoc* Service Flow you just created.

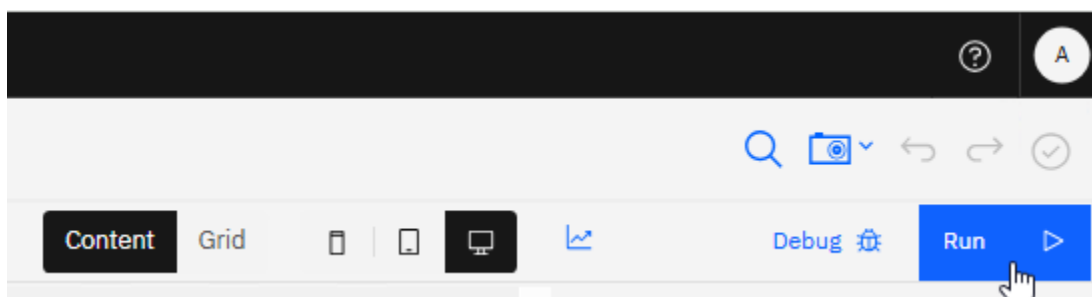


2.6.1 Examine the "My Document Identification and Validation" Client Side Human Service

_1. Click **User interface**, and then click **My Document Identification and Validation**.



_2. Click the **Run** button.



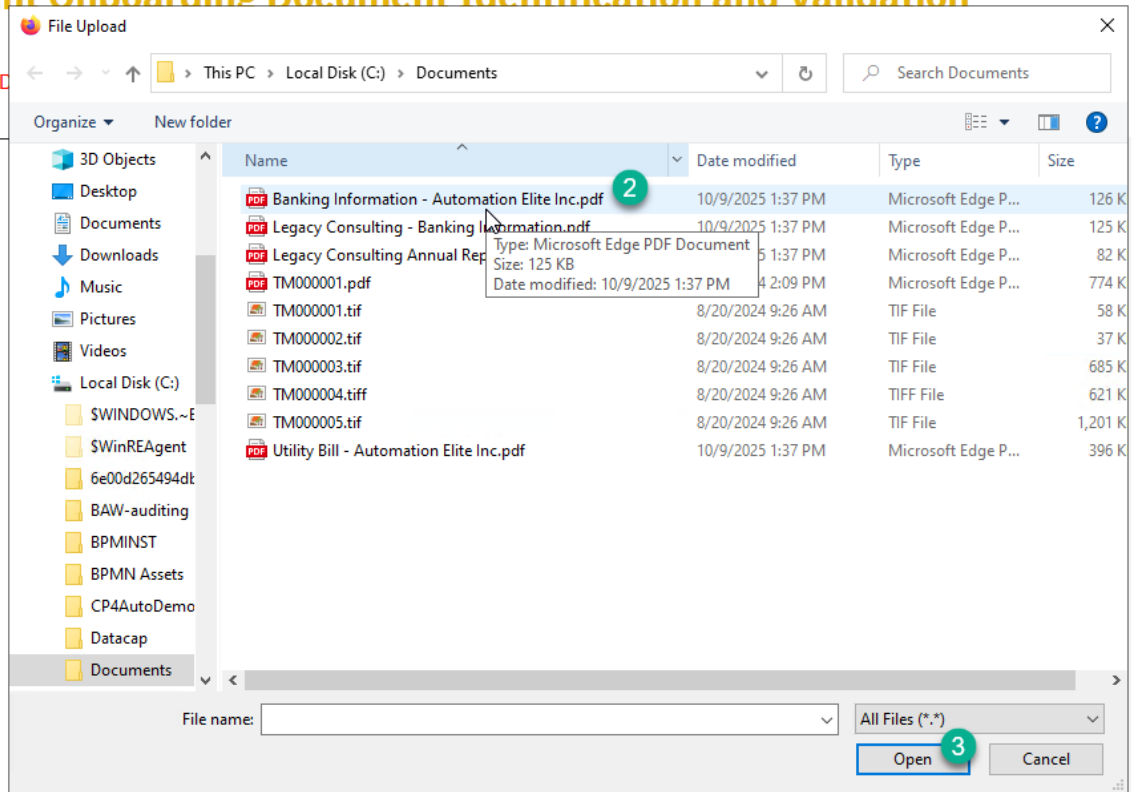
3. Click the **"Open Document"** button, navigate to the **C:\Documents** directory, select **Banking Information – Automation Elite Inc.pdf**, and then click **Open**.



Client Onboarding Document Identification and Validation

1. Upload Client Document

Document Image:



Open Document

Extract Text

_4. Click the **Extract Text** button to extract text from the PDF document.

Document Contents:

Banking Information Focus Corp

This banking information provided here will be used by Focus Corp to withdraw the monthly services fee.

Client Name
Automation Elite Inc.

Bank Name
The Digital Bank

Bank Phone Number
+1-289-333-1234

Bank Address
2190 New Orchard Road, Armonk, New York - 10504

Routing Number
91373084

Account Number
1179476345

Account Type
Checking Savings Other

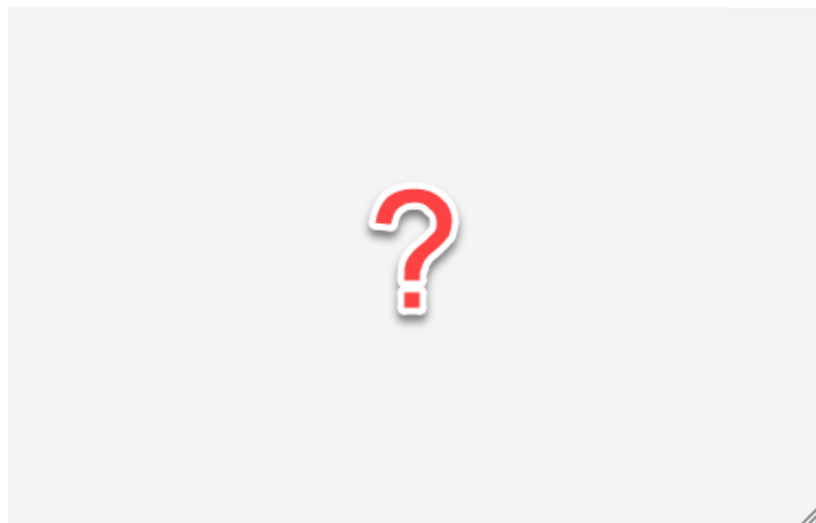
By submitting this form, you authorize Focus Corp to withdraw the monthly services fee from the specified bank account.

Date
4/21/2021



_5. Click the "**Generate Summary**" button, and note that nothing happens.

Gen AI Generated Document Summary:



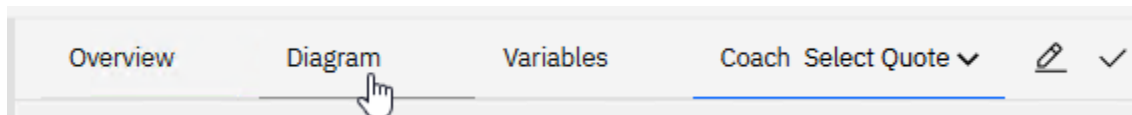
In the next few lab steps, you will configure the Client-side Human Service UI to send the document text to the Gen AI Service Flow you created and display the document classification and summary.

_6. Click the **X** button to close the Chrome Web Browser Window.

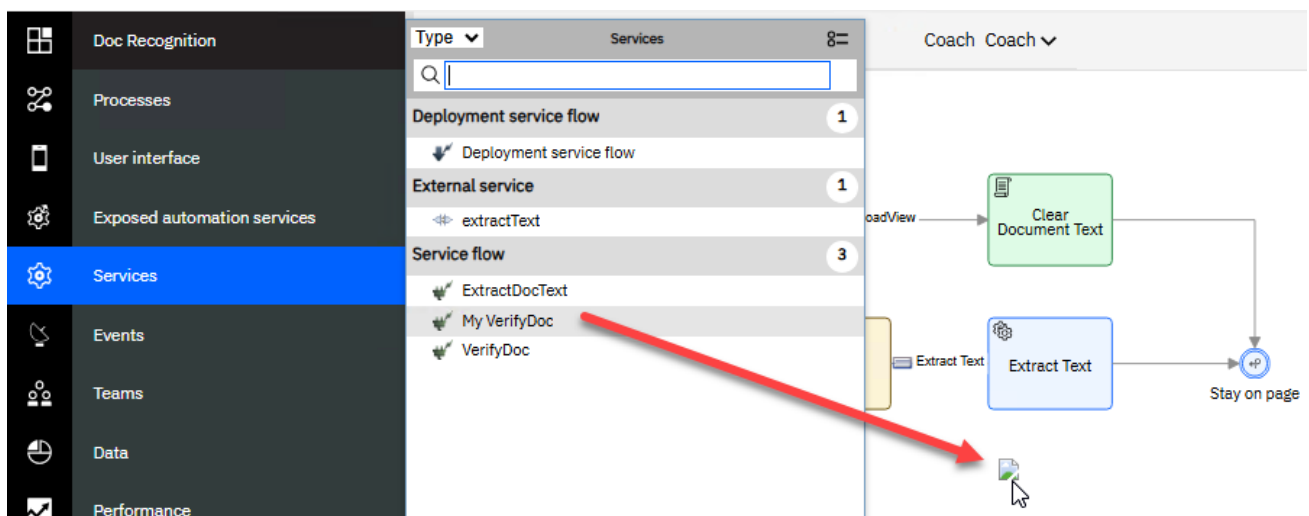


2.6.2 Add "My VerifyDoc" Service Flow

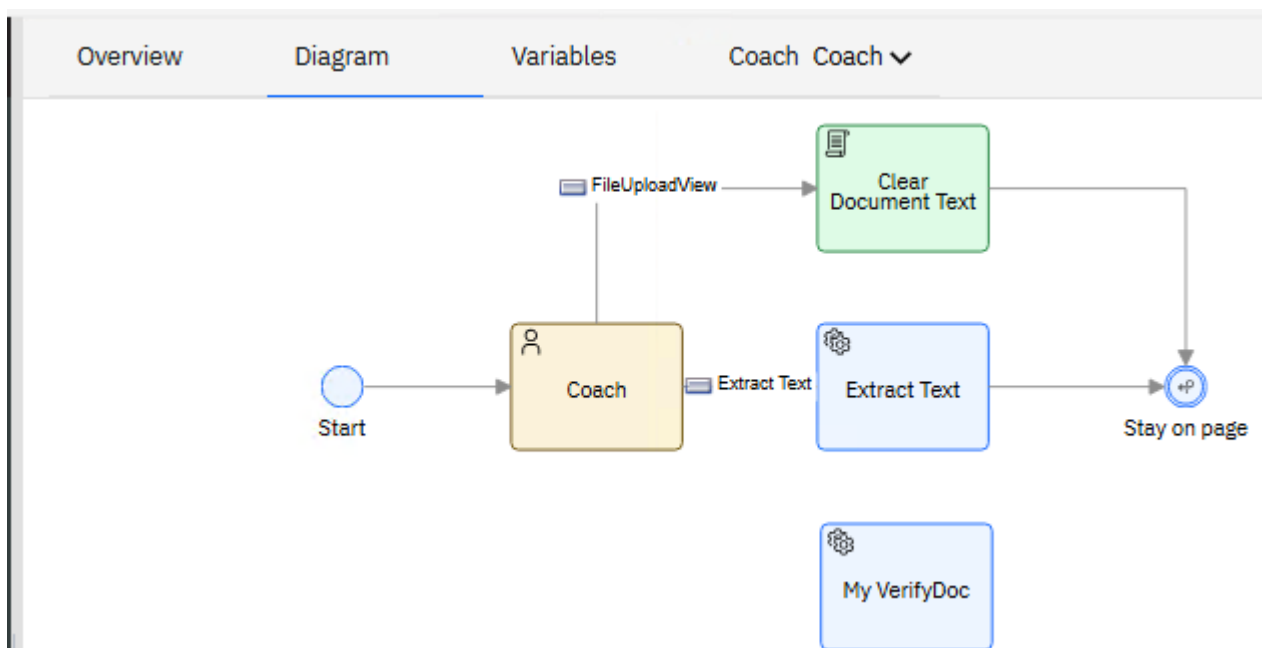
_1. Click the **Diagram** tab.



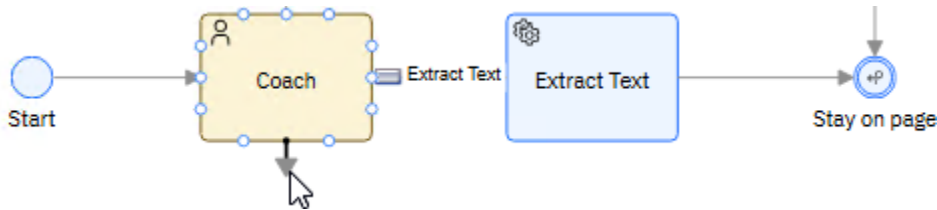
_2. Click "**Services**," then drag and drop "**My VerifyDoc**" onto the Diagram.



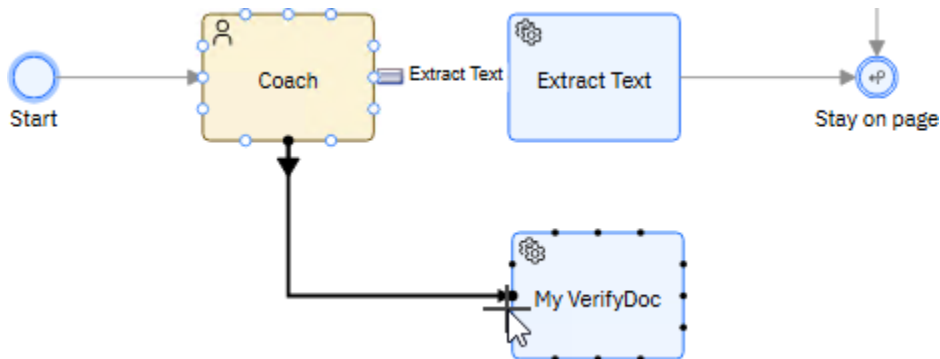
_3. Please verify that the Diagram now includes the **My VerifyDoc** Service Flow you dragged.



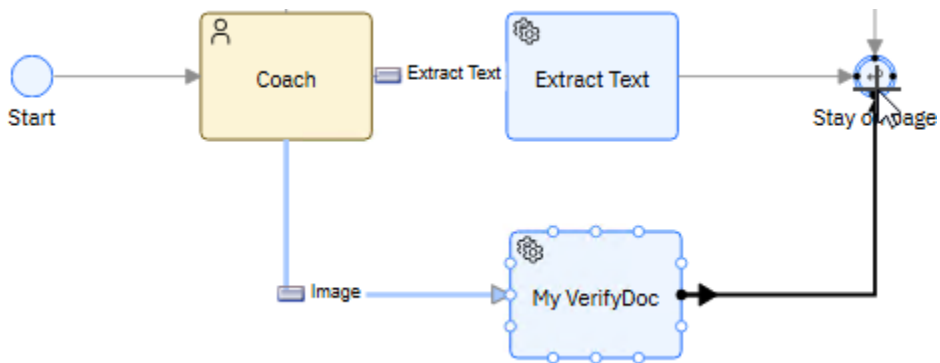
_4. Hover over the bottom right boundary of the **Coach** Activity – you should see a connecting arrow as shown below.



_5. While holding down the left mouse button on the connecting arrow, make a connection to **My VerifyDoc** Activity.



_6. Connect **My VerifyDoc** Activity to **Stay on Page**. Use the method described in steps 4-5.

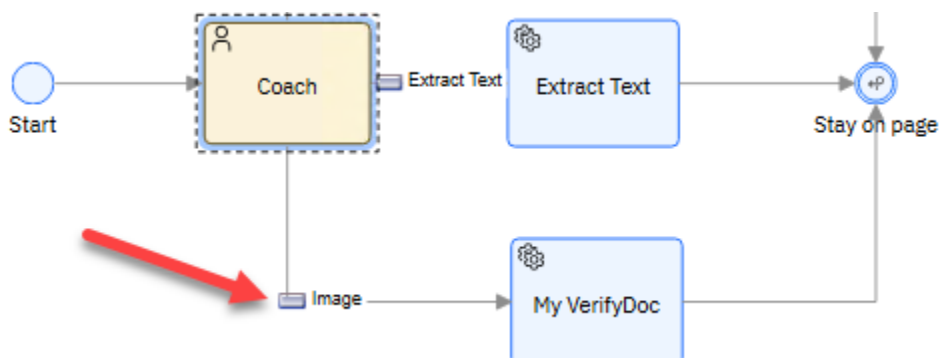


This connection ensures that after you execute the *My GenAI Document Processing* Activity, control returns to the UI.

2.6.3 Associate "Generate Summary" Button with "My VerifyDoc" Service Flow

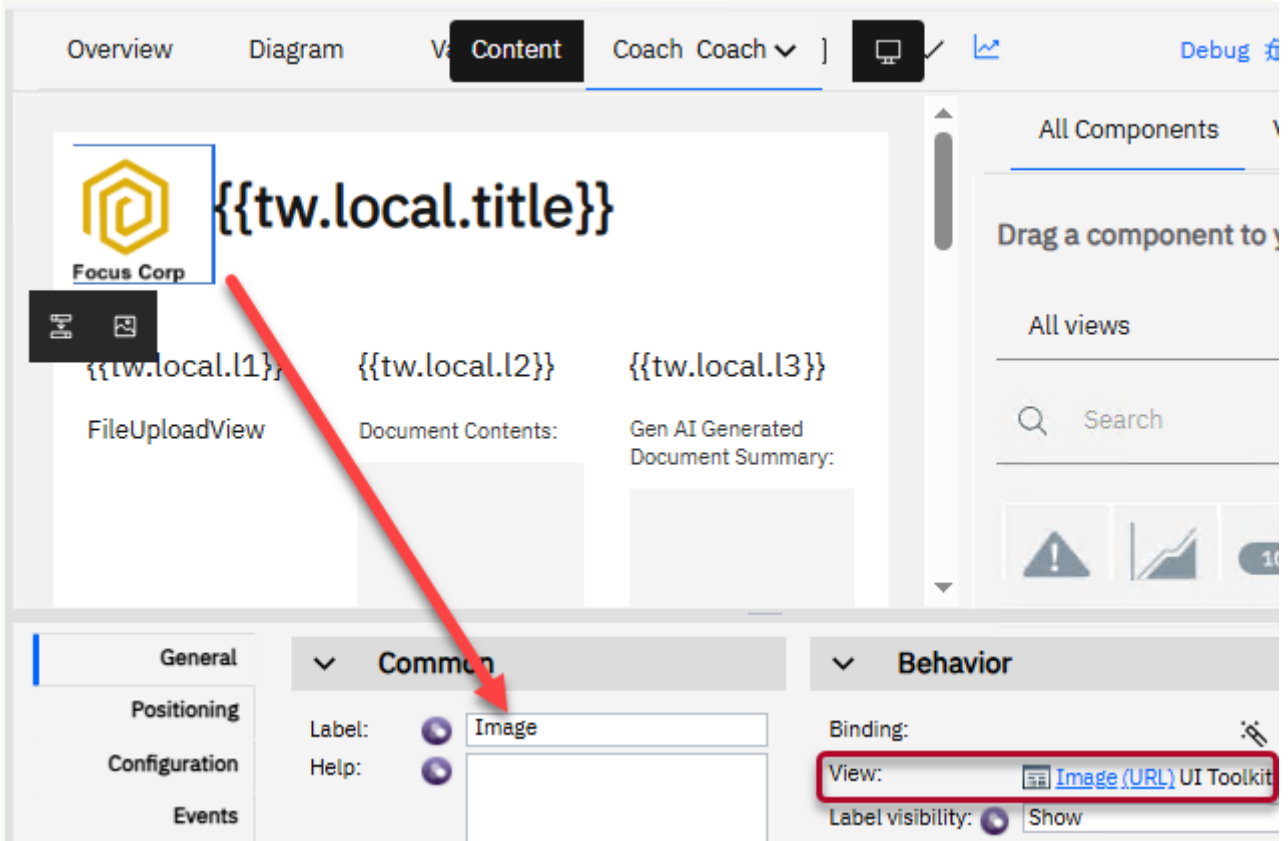
By default, the Generate Summary Button in the Coach was not associated with My VerifyDoc Service Flow. Let's correct this.

_1. Note that the button associated to *Coach* and *My VerifyDoc* is the *Image* button.

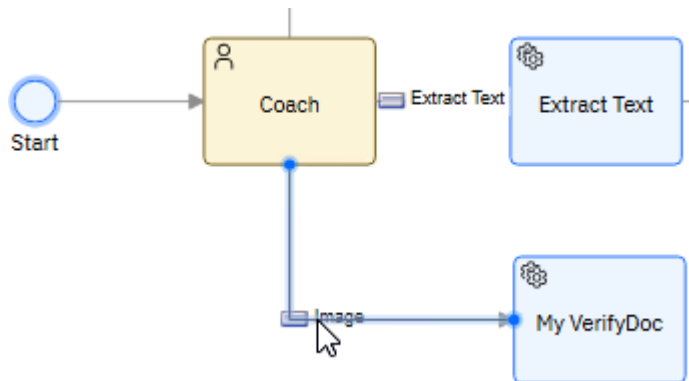


Note that the Image button is the Focus Corp logo!

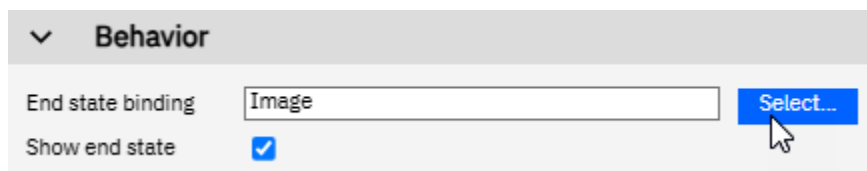
We don't want the Gen AI service to start when we click the logo image.



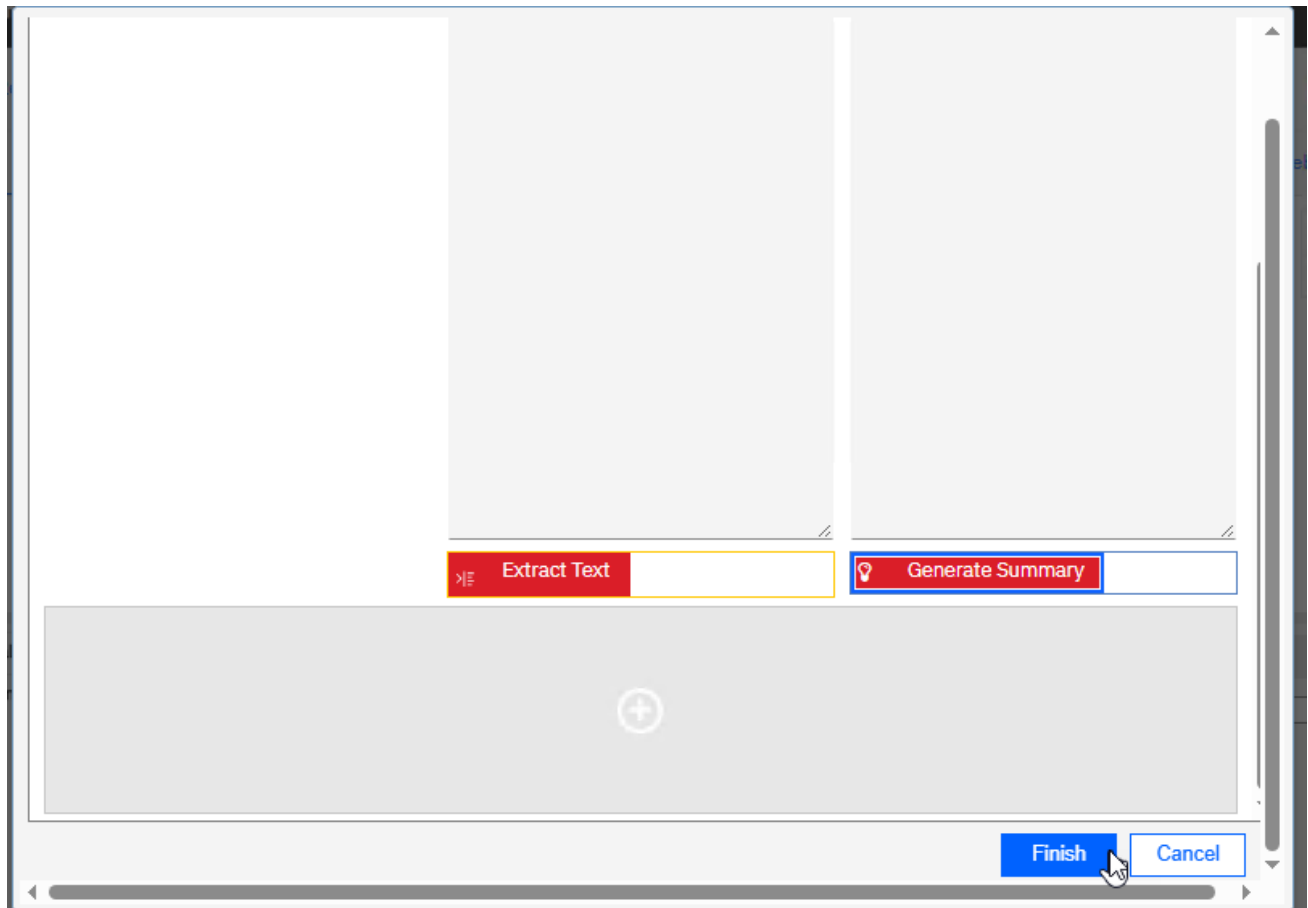
_2. Click the **Image** link.



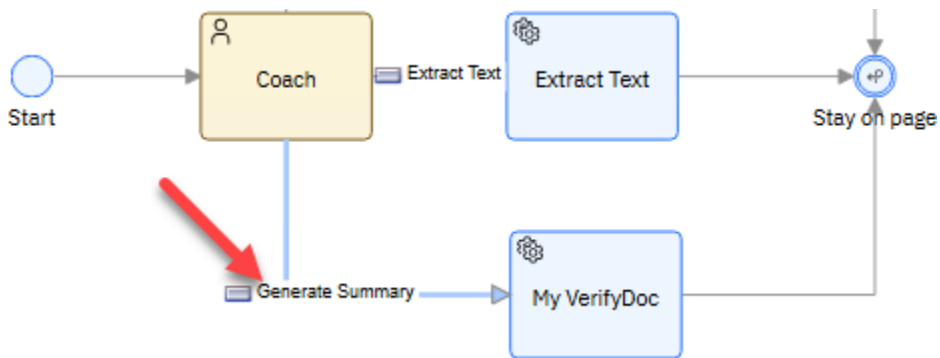
_3. Click the "**Select...**" button.



_4. Select the **Generate Summary** button and click **Finish**.



_5. Verify the **link** is now associated with the **Generate Summary** button.



2.6.4 Map "My VerifyDoc" Service Flow Interface

Before we perform variable mapping, let's examine the figure below to understand the flow and the variables involved.

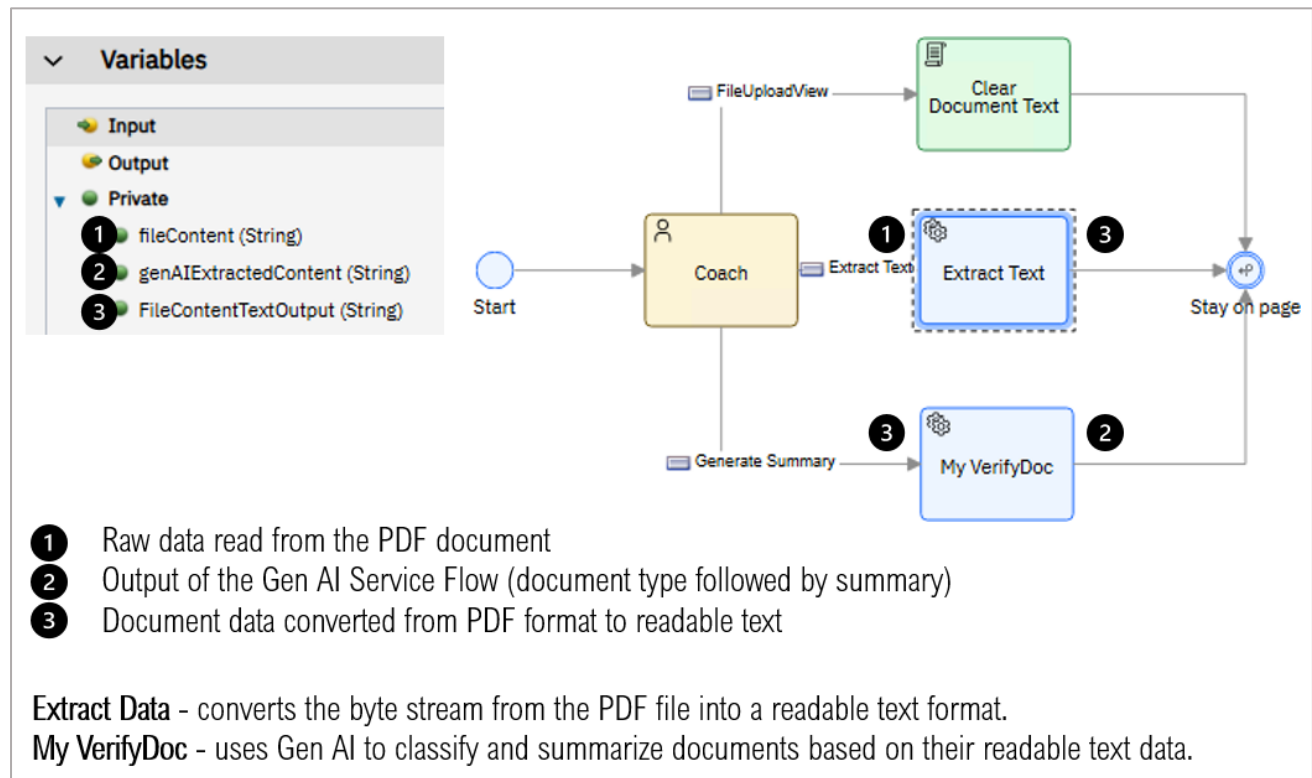
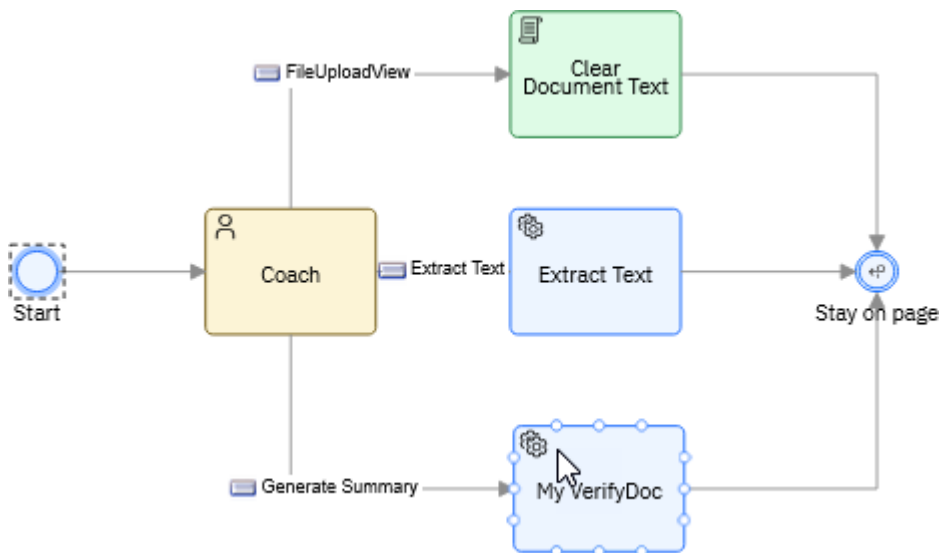
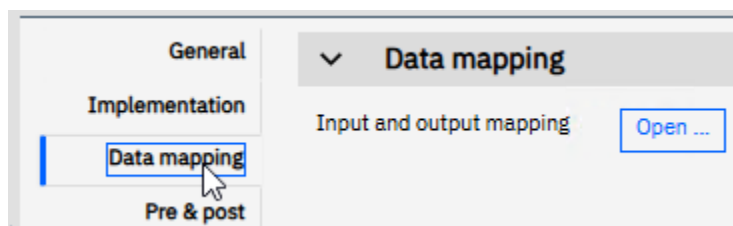


Figure 2. Service Flows and Variables

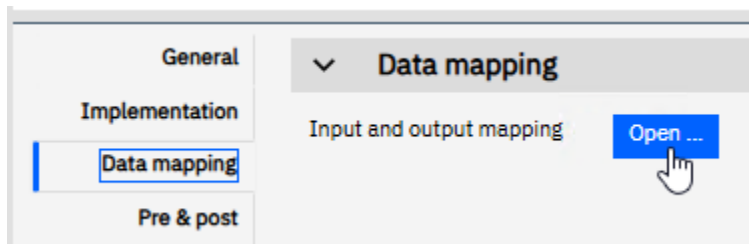
_1. Click the **"My VerifyDoc"** Activity.



_2. Click the **Data mapping** tab.



_3. Click **Open...** to open the Mapping Editor.



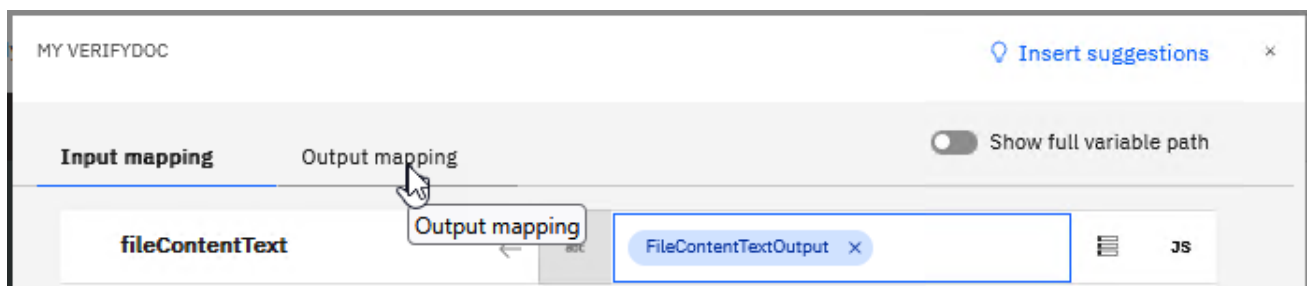
_4. Click the **Select a variable** icon.



_5. Select the **FileContentTextOutput** variable.



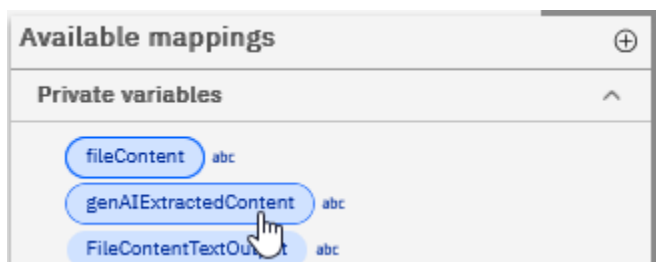
_6. Click the **output mapping** tab.



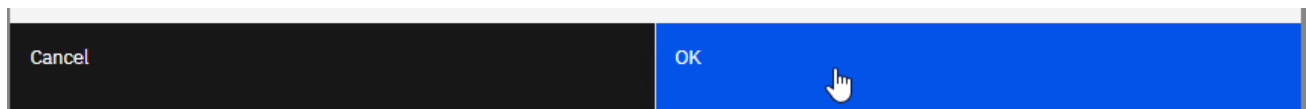
_7. Click the **Select a variable** icon.



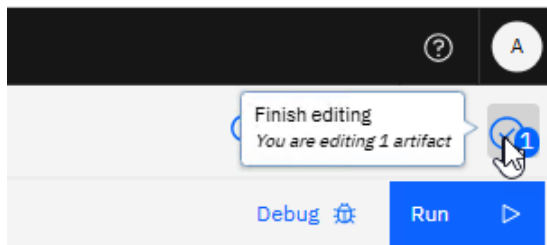
_8. Select the **genAIExtractedContent** variable.



_9. Click **OK** to close the Mapping Editor.

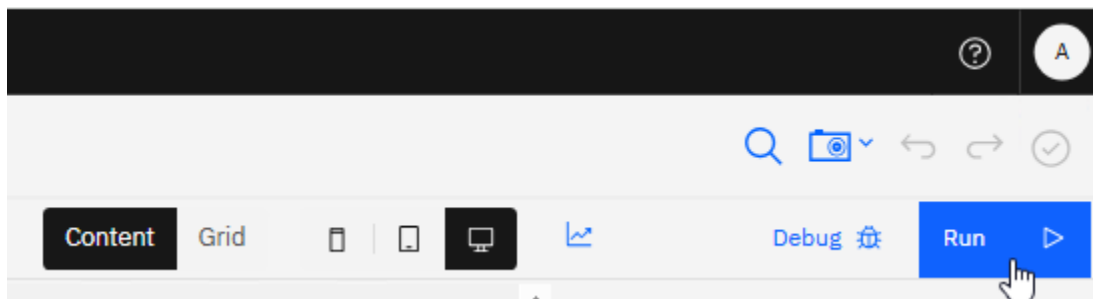


_10. Click the **"Finish editing"** icon to ensure that all your work is saved.

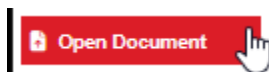


2.7 Test the "My Document Identification and Validation" CSHS

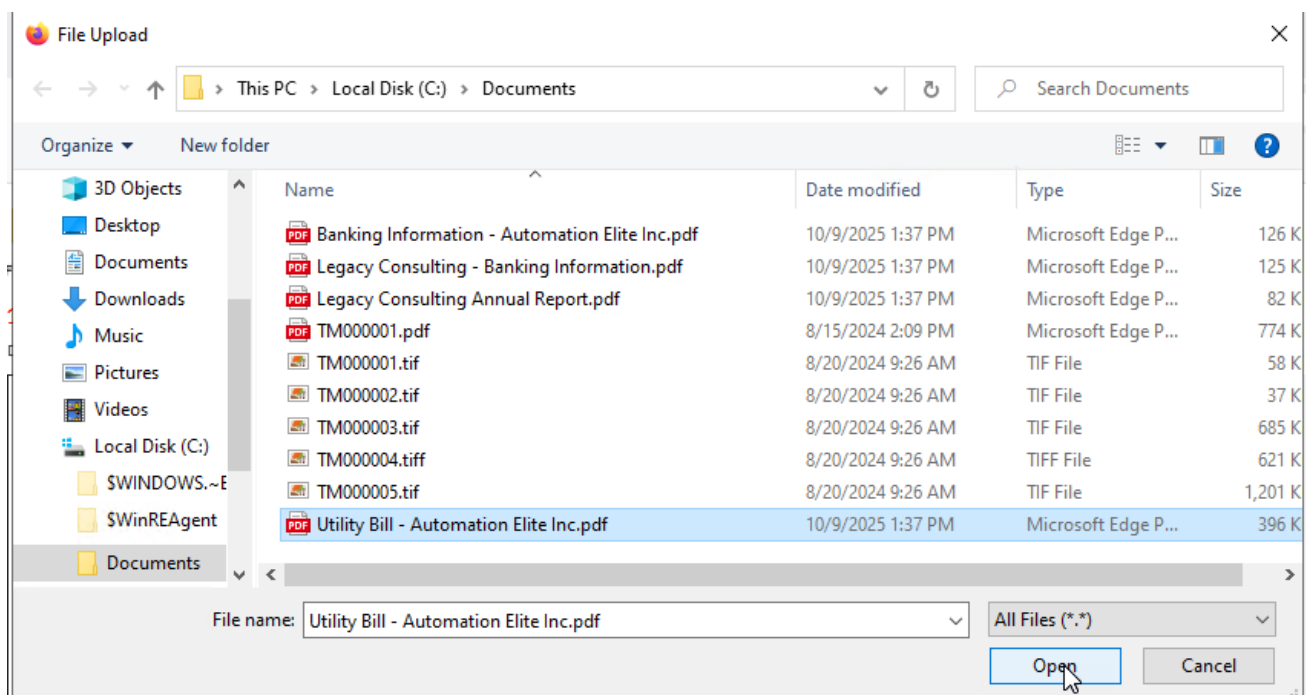
_1. Click the **Run** button.



_2. Click the **Open Document** button.



_3. From **C:\Documents**, select **Utility Bill - Automation Elite Inc.pdf** and click **Open**.



_4. Verify that the document image appears as shown below:

1. Upload Client Document

Document Image:

Account No. 1109646555
Bill Period: 04-01 - 05-01-2022
Page 1/2

CABLEPORIUM

Service For
Customer Name: Automation Elite
Account Number: 1109646555
Service Address: 3974 Carson St,
Lansing, MI 48911
Bill Period: 04-01-2022 - 05-01-2022
Bill Due On: 05-05-2022

Monthly Statement Summary

Previous Balance	\$ 80.05
Payment Received	-\$ 80.05
New Charges - see details	\$ 62.78
Total Amount Due	\$ 62.78

bill saving tips:
Internet speed quality depends on the number of users in your home and what you're using it for. Bandwidth isn't going to have the same need for Internet speed as their grandchildren. Smaller households can have email, web browsing, music, and HD streaming by using as little as 20 Mbps of download speed. Email, web browsing, gaming, and HD video streaming for three devices can be achieved with as little as 30 Mbps of download speed.

ways to pay:
You may pay your bill by sending a check using the enclosed return envelope. You may also opt to pay with your credit or debit card via our website. You can also enroll your card for auto debit option for your convenience.

CABLEPORIUM
Cableporium
PO BOX 1108
Pompano Beach, Florida 33060 US

Account Number 1109646555
Bill Period 04-01-2022 - 05-01-2022
Bill Due On 05-05-2022
Amount Due: \$ 62.78
Amount Enclosed:

Automation Elite
3974 Carson St,
Lansing, MI 48911

Open Document

_5. Click the **Extract Text** button.

Extract Text

_6. Verify that the extracted text appears as shown below:

2. Extract Text from Client Document

Document Contents:

Monthly Statement Summary

Previous Balance

Payment Received

New Charges - see details

Total Amount Due

\$ XXX

-\$ XXX

\$ XXX

\$ XXX

Company

Logo

Company

Name/Logo

Account No. XXXX

Bill Period. XXXXX

Page 1/2

Bill Period

Bill Due On

Account Number XXXX

Bill Period

Bill Due On

Amount Due. \$

Amount Enclosed

COMPANY NAME

PO BOX XXX

CITY, STATE, ZIP CODE

9 0 2 3 8 4 0 5 7 9 2 8 3 6 4 0 1 8 9 3 7 4 2 9 3 6 1 0 9 1 4 7 0 8 1 3 9 4 8 3 7

4 7 0 3 9 1 9 3 4 0 3 1 9 7 1

Service For

Ways to Pay:

You may pay your bill by sending a check using the enclosed return envelope. You may also opt to pay with your credit or debit card via our website. You can also enroll your card for auto debit option for your convenience.

Bill Saving Tips:

Internet speed quality depends on the number of users in your home and what you're using it for. Grandparents aren't going to have the same need for internet speed as

_7. Click the **Generate Summary** button.



_8. Verify that the AI-generated output appears as shown below:

3. Generate Client Document Summary


Gen AI Generated Document Summary:


This document is a Bill.


Summary:

- * Company: Automation Elite
- * Address: 3974 Carson St, Lansing, MI 48911
- * Account Number: 1109646555
- * Bill Period: 04-01-2022 - 05-01-2022
- * Bill Due On: 05-05-2022
- * Contact Information: +1 800-354-8373, www.cableporium.com, accessibility@company.com, or write to the address.

_9. If you like, repeat steps 2-8 to try the other four documents.

 Banking Information - Automation Elite Inc.pdf

 Legacy Consulting - Banking Information.pdf

 Legacy Consulting Annual Report.pdf

This marks the end of the lab.

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