# IBM Cloud Pak for Business Automation Tech Jam {EMEA} – April 25-27, 2023

We start at 9:10am UTC+2:00h
(Central European Summer Time)

Olaf Hahnl
Edward Farish
Thomas Schulze
Jürgen Lukas
Matthias Jung

IBM Cloud Pak for Business Automation SWAT

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# Agenda

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

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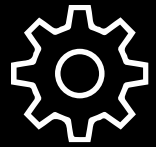
# Who, Why, What

## Who

- Who are we?
  - Automation 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

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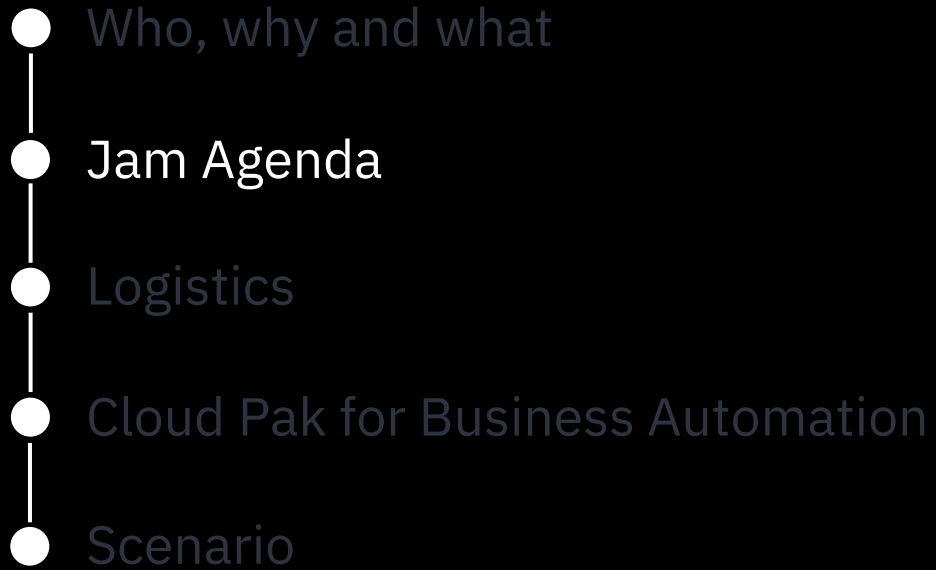
# Agenda

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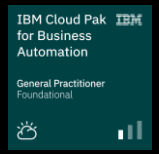
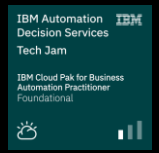
# Jam Agenda – {EMEA}






| | | Activity – Time Zone UTC +2:00h (Central European Summer Time)<br>WebEx: https://ibm.webex.com/meet/edward.farish | |
|---|---|---|---|
| Day 1 | AM | ▪ 09:00 [All] Arrival & etc.<br>▪ 09:10 [Olaf Hahnl] Welcome Note<br>▪ 11:45 [All] Choose & provision scenario | ▪ 09:30 [Olaf Hahnl] Scenario Overview |
| | PM | ▪ 13:00 [All] Start scenario implementation<br>▪ 17:00 [Olaf Hahnl] Close Day 1 | ▪ 16:30 [Swapnil Agrawal] Integrating CP4BA with Watson ML |
| Day 2 | AM | ▪ 09:00 [Olaf Hahnl] Day 2 kick-off<br>▪ 09:30 [All] Continue scenario implementation | |
| | PM | ▪ 14:00 [All] Continue scenario implementation<br>▪ 17:00 [Olaf Hahnl] Close Day 2 | ▪ 15:00 [Bill Lawton] Business Automation Roadmap 2023 |
| Day 3 | AM | ▪ 09:00 [Olaf Hahnl] Day 3 kick-off<br>▪ 10:30 [All] Complete scenario implementation | ▪ 12:00 [Paul Pacholski] Business Automation Manager Open Edition (PAM)<br>▪ 14:00 [Owen Cline] Workflow Process (WfPS) |
| | PM | ▪ Survey https://www.surveymonkey.com/r/CP4BATechJam2023<br>▪ 15:00 [Olaf Hahnl] Feedback / Open Discussion / Q&A & Closure | |

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# Logistics – {EMEA}

## Dates

**EMEA [GMT+2:00h]: Tuesday April 25th to Thursday 27th [9:00am – 5:30pm]**

## Logistics

**Hosts**:
- EMEA: Olaf Hahnl, Edward Farish

**WebEx**:
- EMEA: https://ibm.webex.com/meet/edward.farish

- **Instructions**:
  - Bring your own laptop
  - (optional) Tablet / secondary screen

## Participants

| | |
|---|---|
| Participants: | **122** |
| Registrants: | 129 |
| Business Partners | 76 |
| IBMers | 4 |

Countries Represented: [32]

Austria, Bahrain, Belgium, Bulgaria, Czech Republic, Denmark, Egypt, Finland, France, Germany, Hungary, India, Israel, Jordan, Kenya, Kuwait, Luxembourg, Mauritius, Morocco, Netherlands, Portugal, Qatar, Romania, Saudi Arabia, Slovakia, Slovenia, South Africa, Switzerland, Turkey, UAE, Yemen

## Technical Team

### Americas

- Jürgen Lukas (BAA, BAI, BAW)
- Olaf Hahnl (CP4BA, BAW, RPA)
- Matthias Jung (CP4BA, Infrastructure, Content)
- Alain Robert (ADS)
- Paul Pacholski (BAW, RPA, BAI, Process Mining)
- Clandis Baker (ADP)

- **Communication - Slack:**
  - One **#cp4ba-tech-jam-main-lobby** and several per topic channels **#cp4ba-tech-jam-XXXX** created
  - If this is your first time accessing IBM Slack workspace you 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

- **Material - GitHub**
  - One stop for all material accessible across IBM
    - https://github.com/IBM/cp4ba-tech-jam

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# The IBM hybrid cloud software approach

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

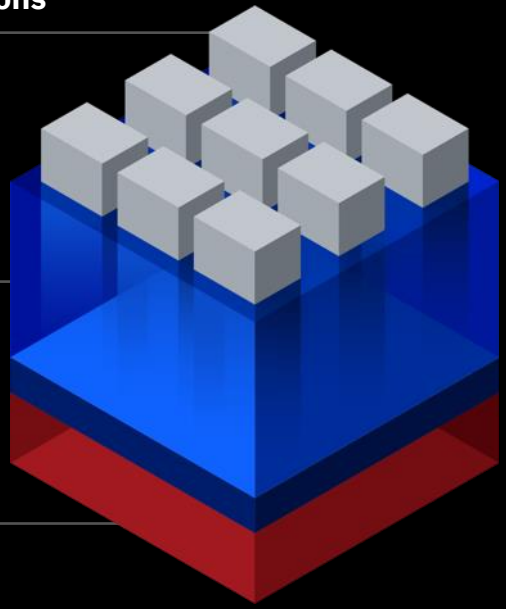
Unify and simplify software experiences with seamless integration of related capabilities

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

**Solutions, products and applications**

**Cloud Paks**

Red Hat OpenShift **Hybrid cloud platform**

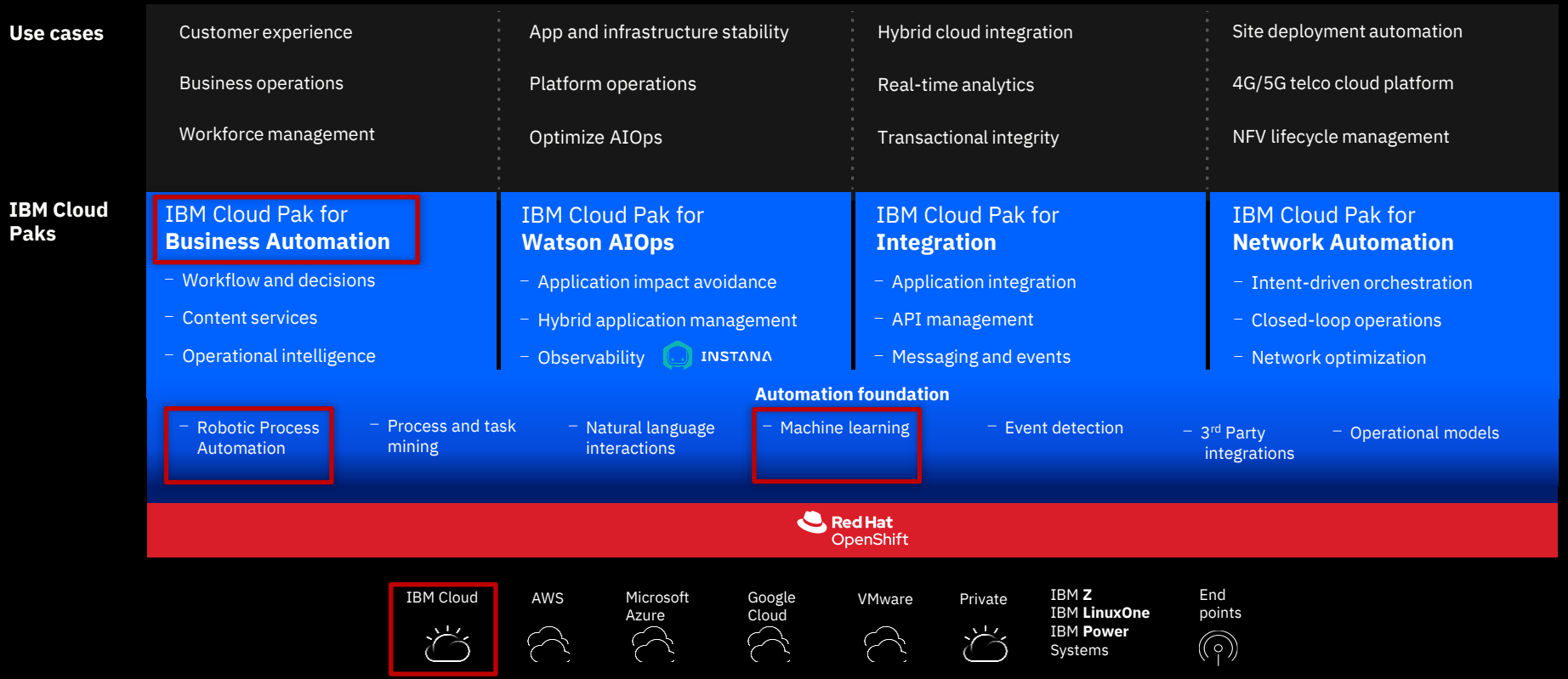


**Watson**

Infuse AI for business throughout our software

# IBM Automation platform

## The most complete set of business and IT Automation services, powered by AI

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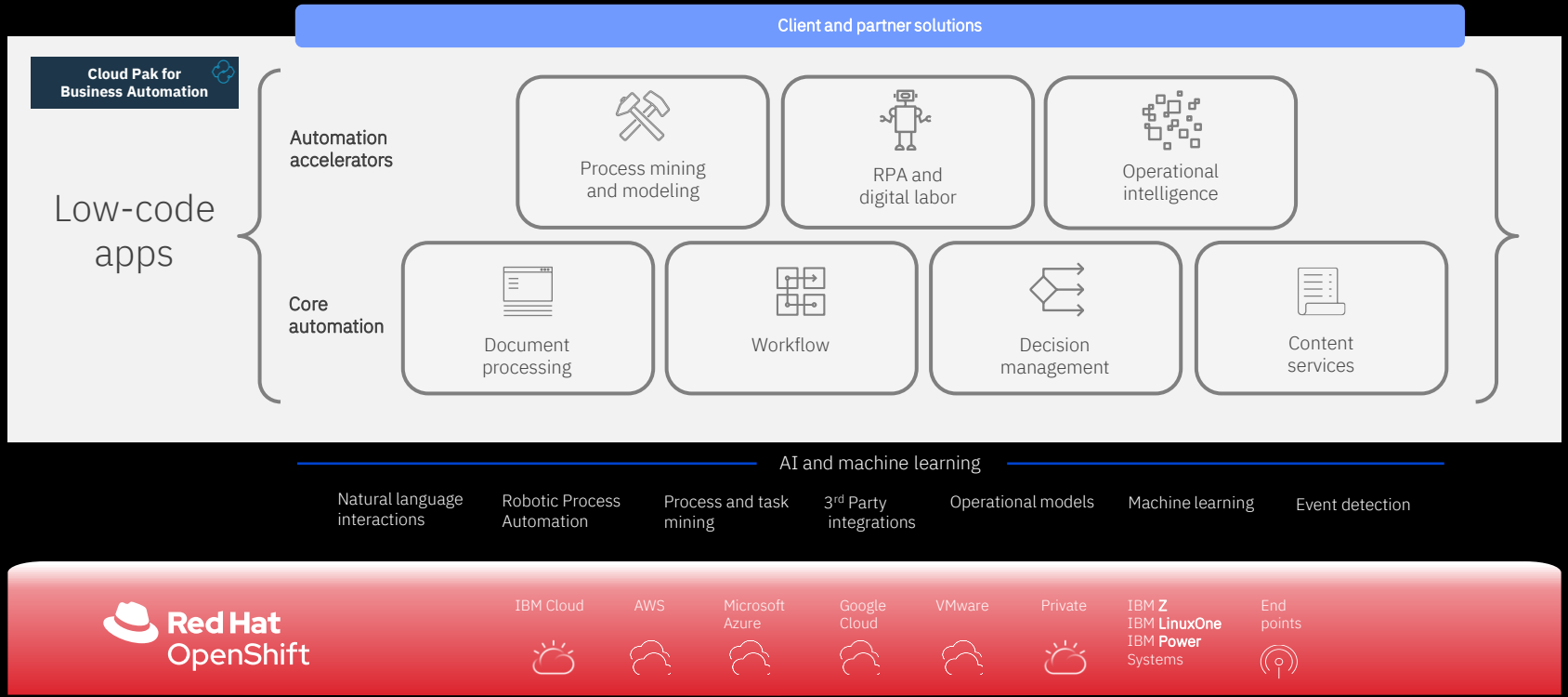
# IBM Cloud Pak for Business Automation

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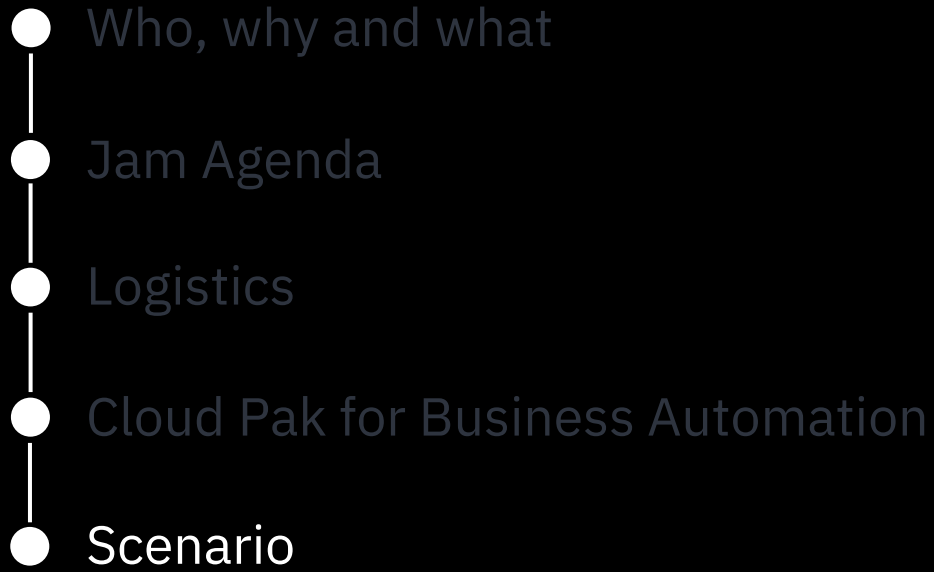
# Agenda

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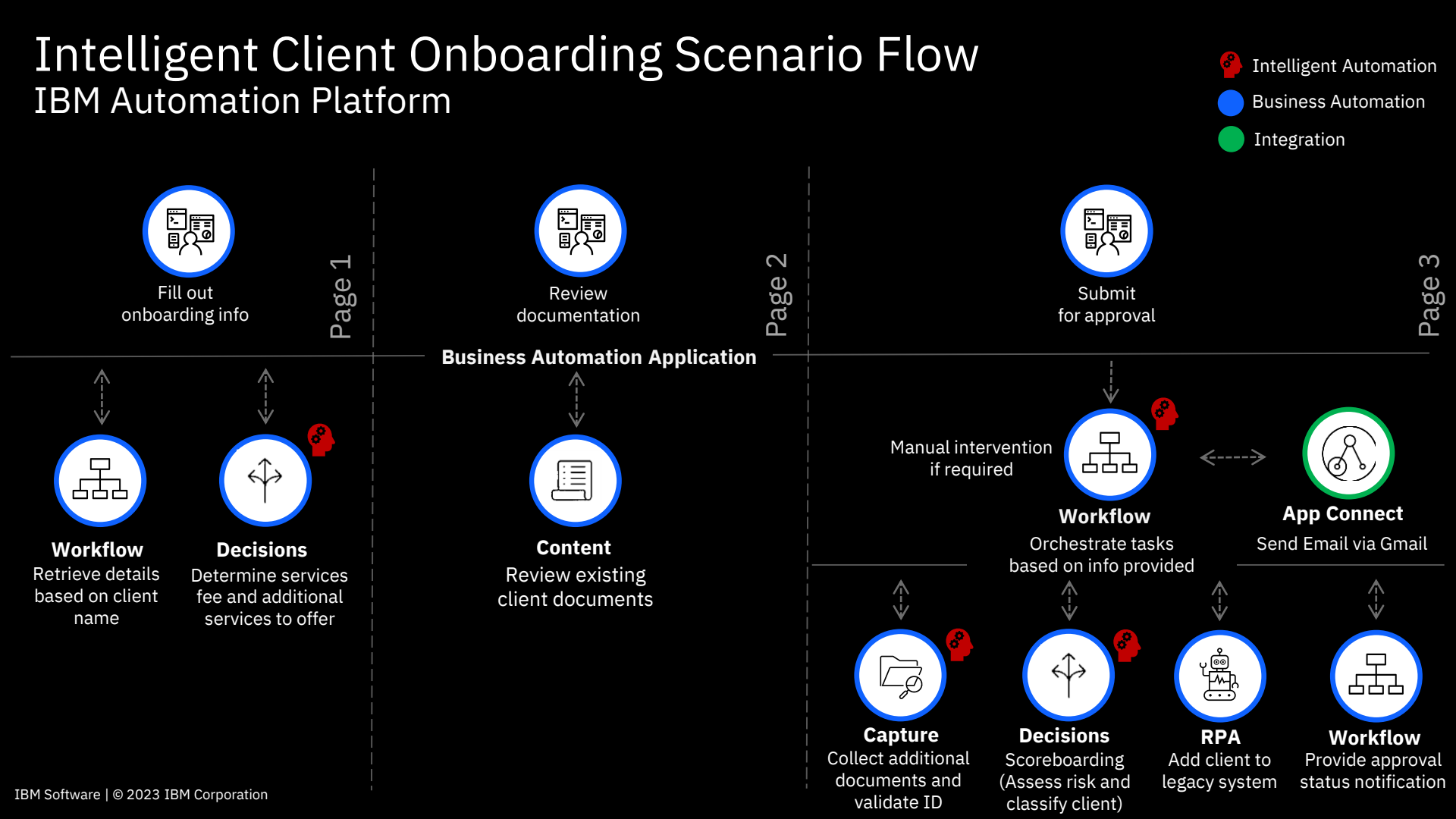
# Intelligent Client Onboarding Scenario – Introduction
## IBM Automation platform

- Focus Corp is a service provider across various industries such a Finance, Healthcare and more
- The Client Onboarding use case utilizes multiple business automation capabilities in the IBM Cloud Pak for Business Automation to digitize business operations
- Features
  - AI-powered intelligent automation
  - Straight-through processing and knowledge worker review
  - Usage of low-code apps, RPA, workflow, decisions and content
- Assets are used for enablement (Tech Jams), POCs, testing, sales and customer demos

# Intelligent Client Onboarding Scenario Flow

## IBM Automation Platform

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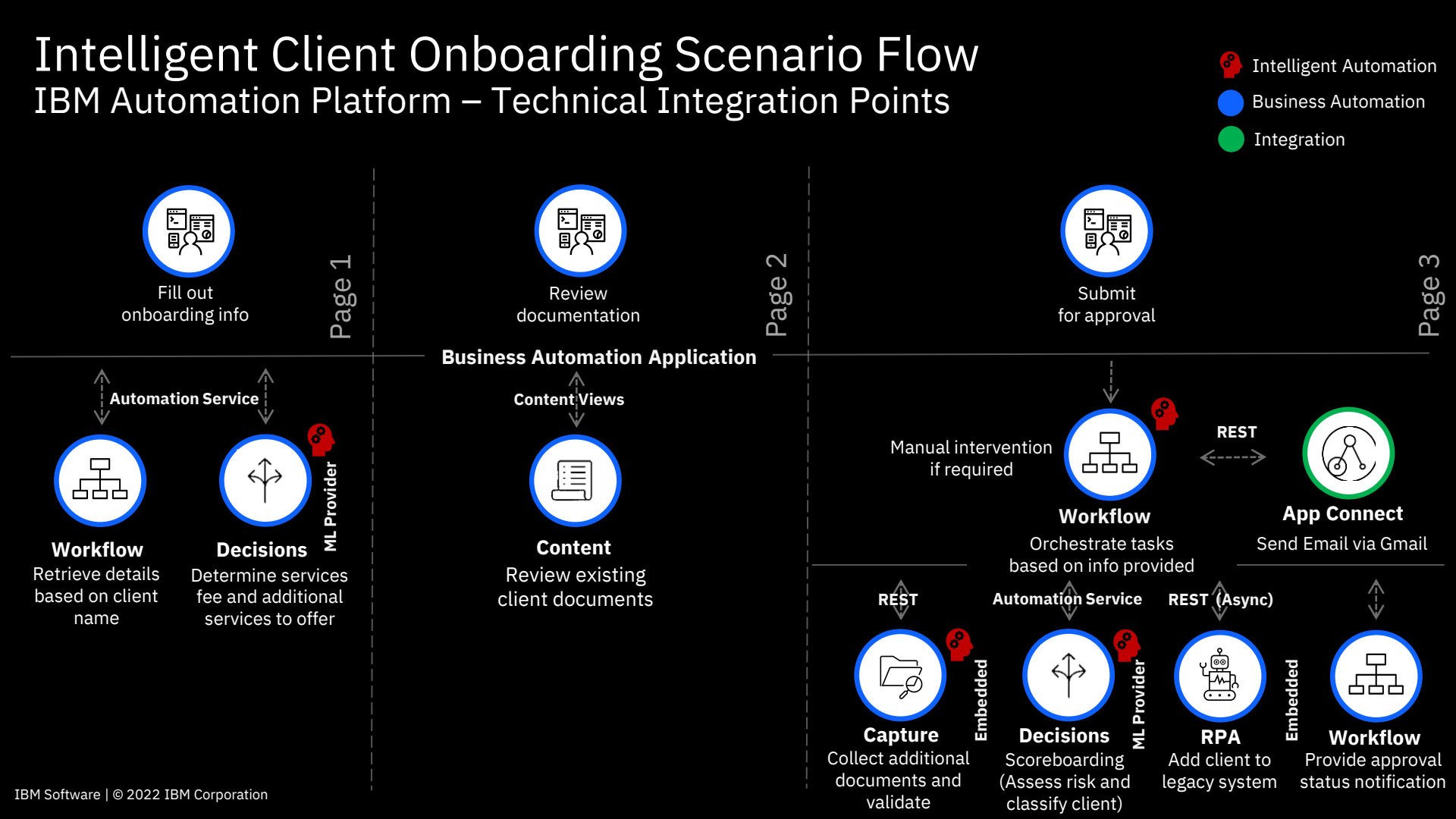
# Intelligent Client Onboarding Scenario Flow

## IBM Automation Platform – Technical Integration Points

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# Demo

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# 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:**
  - Cloud Pak for Data to add more AI capabilities
  - Cloud Pak for AIOps & Security to operate and secure the solution

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# Tracks

Different tracks to cater for different target groups and previous levels of exposure to Cloud Pack for Business Automation

- **Track 1 – Foundation**
  - Audience: New to Cloud Pak for Business Automation (CP4BA)
  - Learning: Overview of the Cloud Pak from an end-user perspective
  - Approach: Perform the Client Onboarding scenario

- **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: Detailed lab instructions to install and configure CP4BA

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# Labs

- End-to-End (end-user view)
- Automation Document Processing (ADP)
- Business Automation Application
- Business Automation Insights
- Bring-up (Install & Config)
- Decisions (Automation Decision Services)
- FileNet Content Services
- Process Mining
- Robotic Process Automation
- Workflow

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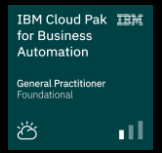
# End-to-End [~2 hrs.]

- **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 manual tasks using Robotic Process Automation

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# Automation Document Processing [~3-4 hrs.]

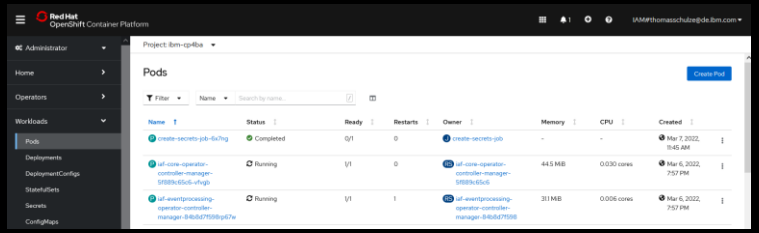
- **Abstract**
  - Using Automation Document Processing (ADP) set up a capture solution by creating a project.
  - Learn how to use the machine learning classification for sample documents.
  - Define fields for extraction.
  - Review built in user interface to process documents.

- **Objective**
  - Learn about core concepts and features in ADP like Process Designer, Deployment tools and Application templates

- **Features Exercised**
  - Creating a Project
  - Configure a document type
  - Creation of fields that need to be extracted
  - Categorizing different document types
  - Training different documents types
  - Data extraction and correcting extracted values.
  - Versioning and deploying a project
  - Application designer
  - Exporting your project

# Bring-up (Install & Config) [~8 hrs.]

- **Abstract**
  - Install and configure a Production deployment of IBM Cloud Pak for Business Automation (CP4BA, version 21.0.3 IF005) on an OpenShift cluster on TechZone using the CP4BA rapid deployment scripts




- **Objective**
  - Learn how to quickly bring-up a Production deployment of IBM CP4BA

- **Features Exercised**
  - Deploy IBM DB2 Operator, Containers & create needed databases
  - Install IBM CP4BA Operator
  - Deploy IBM CP4BA – Production deployment – version 21.0.3 IF005 – Foundation and Content patterns only

- **Prerequisites:**
  - You must already have an entitlement key / license for CP4BA available

- **You want to perform this lab? Follow the lab instructions!**
  - Verify that you have an entitlement key / license for CP4BA available (https://myibm.ibm.com/products-services/containerlibrary)
  - Link to Lab Guide: https://github.com/IBM/cp4ba-labs/tree/main/22.0.1/Bring-up

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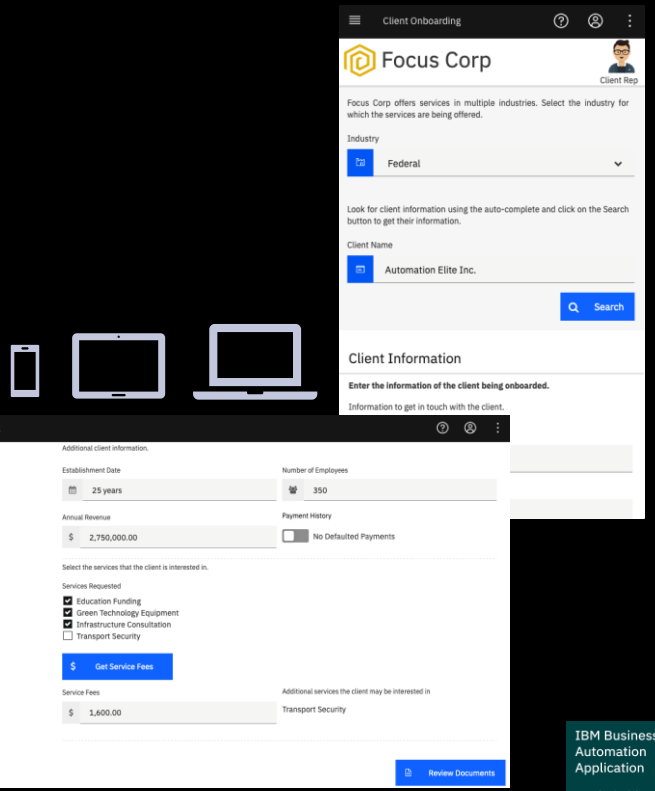
# Business Automation Application [~2 hrs.]

- **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




IBM Business Automation Application

IBM Cloud Pak for Business Automation Practitioner Foundational

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# Business Automation Insights (BPC) [~1 hour]

## Abstract

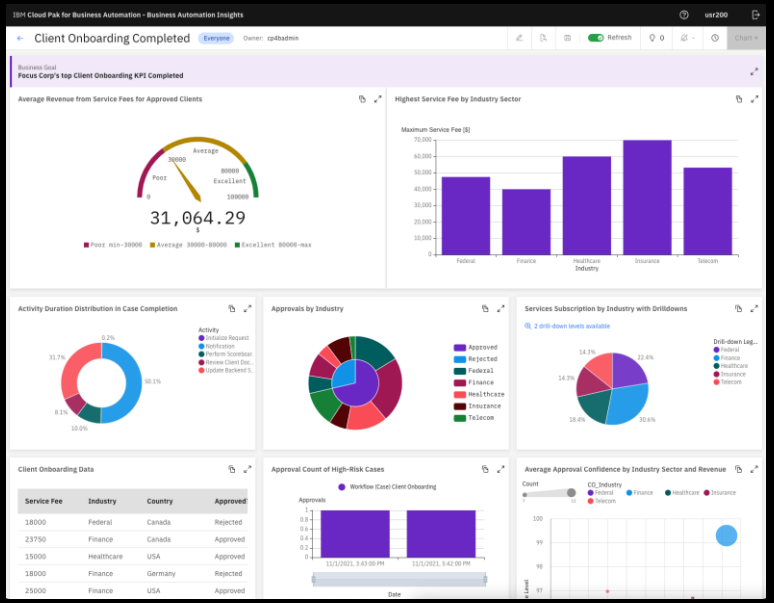
- In this lab exercise you will use Business Performance Center (BPC) as part of Business Automation Insights (BAI) to create a business dashboard that will enable business users to get real time business insights into their client onboarding business.

## Objective

- The objective of this lab exercise is to enable you to build business dashboards using the data in BAI emitted by CP4BA runtimes such as ADS, Workflow, 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



# Decisions (Automation Decision Services) [~3 hrs.]

## Abstract

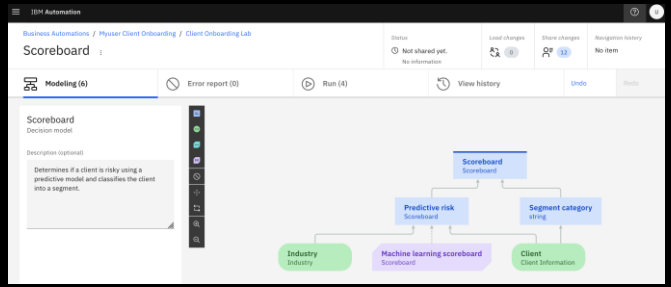
- Create and manage business decisions based on client onboarding solution data
- Infuse intelligence by adding a predictive model into a decision service
- Connect a decision service to a GitHub repository

## 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




IBM Automation Decision Services
Tech Jam

IBM Cloud Pak for Business Automation Practitioner
Foundational

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# FileNet Content Services [~4-8 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 Document Classes and Properties, Security, Storage Areas (CPE) and Repositories, Entry Templates, Viewer Maps, Content Redaction (ICN)
  - Explore the Graph QL interface and Content Based Retrieval

- **Features Exercised**
  - Defining Document Properties and Class hierarchy for an application
  - Configure Security settings through direct and default instance security
  - Apply Security changes to multiple documents through Bulk Actions
  - Reassign documents to different storage areas / storage policies
  - Configure Event Subscriptions
  - Test integration with Content Search Services
  - Create Entry Templates for Documents and Folders
  - Redact Sensitive Information in a Document using Content Redaction
  - Search for Document using Search and Simple Search features

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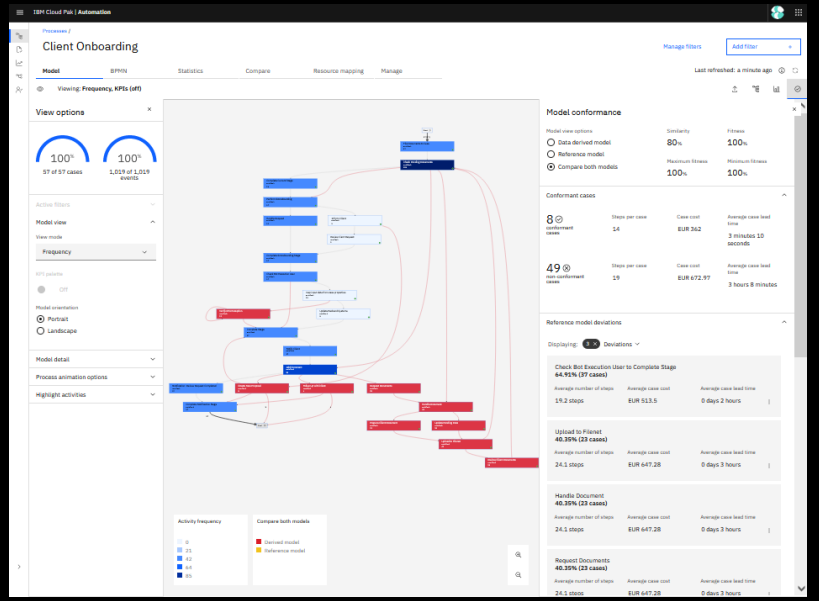
# Process Mining [~2 hrs.]

- **Abstract**
  - Using the event data from the Client Onboarding scenario, explore and master the power of IBM Process Mining and learn how to apply it to real business scenarios

- **Objective**
  - Master the basics and explore advanced Process Mining features
  - Learn how to use Process Mining to identify business improvement and automation opportunities

- **Features Exercised**
  - Creation of new project from CSV 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
  - Using Business Dashboards and Analytics to track KPI violations and identify automation candidates
  - Use simulations to discover automation ROI
  - Learn how to generate BPMN and export it for external implementation of discovered automation




IBM Process Mining

IBM Cloud Pak for Business Automation Practitioner
Foundational

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# Robotic Process Automation [~3 hrs.]

- **Abstract**
  - 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. Next you will implement a Workflow Process to invoke this bot to add client information and information about the services they signed up to those two applications

- **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 use the web Recorder to automate a web application
  - Learn how to invoke a bot script from a Workflow process via orchestrate process asynchronously

- **Features Exercised**
  - IBM RPA Studio
  - Recorder
  - IBM RPA REST API
  - BAW integration with IBM RPA

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# 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

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# Survey

https://www.surveymonkey.com/r/CP4BATechJam2023

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 |