

IBM Cloud Pak for Business Automation Tech Jam {Americas} – June 28-30, 2022

We start at 9:10am UTC-4:00h
(Eastern Daylight Time)



Tom Al-Hamwy
Program Director, Business Automation SWAT

Swapnil Agrawal
Americas Technical Lead, Business Automation SWAT

Agenda

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

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Who, Why, What



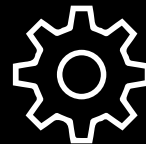
Who

- 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



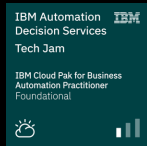
What

- Hear-out the CP4BA strategy
- Experience CP4BA hands-on

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Jam Agenda – {Americas}



Activity – Time Zone GMT-4:00h (Eastern Daylight Time)
WebEx: <https://ibm.webex.com/ibm/j.php?MTID=mc7a3ec7fe1d417e2ed15d05368e09275>

Day 1	AM	<ul style="list-style-type: none"> 09:00 [All] Arrival & etc. 09:10 [Tom Al-Hamwy] Welcome Note 11:45 [All] Choose & provision scenario 	<ul style="list-style-type: none"> 09:30 [Swapnil Agrawal & Jorge Rodriguez] Scenario Overview
	PM	<ul style="list-style-type: none"> 13:00 [All] Start scenario implementation 17:00 [Tom Al-Hamwy] Close Day 1 	
Day 2	AM	<ul style="list-style-type: none"> 09:00 [Tom Al-Hamwy] Day 2 kick-off 09:30 [All] Continue scenario implementation 	<ul style="list-style-type: none"> 11:00 [Clandis Baker & Dan Ouimet] Automation Doc. Processing
	PM	<ul style="list-style-type: none"> 13:00 [All] Continue scenario implementation 17:00 [Tom Al-Hamwy] Close Day 2 	<ul style="list-style-type: none"> 15:00 [Lauren Mayes] Content Services – recent updates and roadmap
Day 3	AM	<ul style="list-style-type: none"> 09:00 [Tom Al-Hamwy] Day 3 kick-off 10:30 [All] Complete scenario implementation 	<ul style="list-style-type: none"> 09:30 [Owen Cline] Workflow Process Service (WfPS)
	PM	<ul style="list-style-type: none"> Survey: https://www.surveymonkey.com/r/CP4BATechJam2022 15:00 [Tom Al-Hamwy] Feedback / Open Discussion / Q&A & Closure 	

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Logistics – {Americas}

Dates

Americas [GMT-4:00h]: Tuesday June 28th to Thursday 30th [9:00am – 5:30pm]

Logistics

Hosts:

- Americas: Tom Al-Hamwy, Swapnil Agrawal

WebEx:

- Americas:
<https://ibm.webex.com/ibm/j.php?MTID=mc7a3ec7fe1d417e2ed15d05368e09275>

Instructions:

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

Communication - Slack:

- One **#cp4ba-tech-jam-main-lobby** and several per topic channels **#cp4ba-tech-jam-XXXX** created
- 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

Participants

- Participants: **103**
- Registrants: **127**

Business Partners 12
IBMers 91
CSM[40] | EL[25] | TS[16] | CE[4] | Other[13]

Countries Represented: [6]

- Canada, Chile, Colombia, Ecuador, Mexico, Peru, USA

Technical Team

Americas

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

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

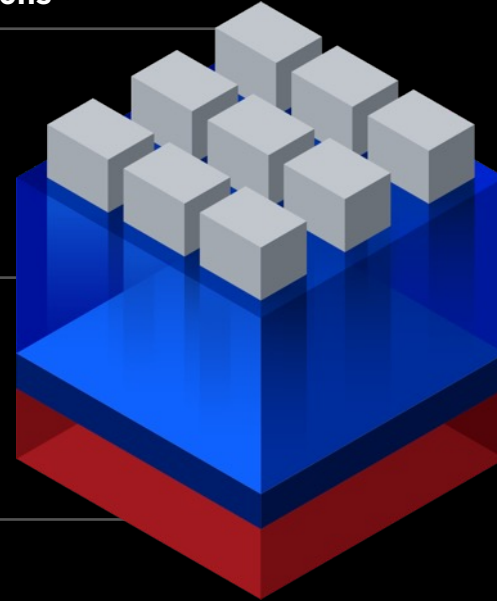
Enable software to run anywhere, on any cloud, as agile cloud-native services

Solutions, products and applications

Cloud Paks



Hybrid cloud platform



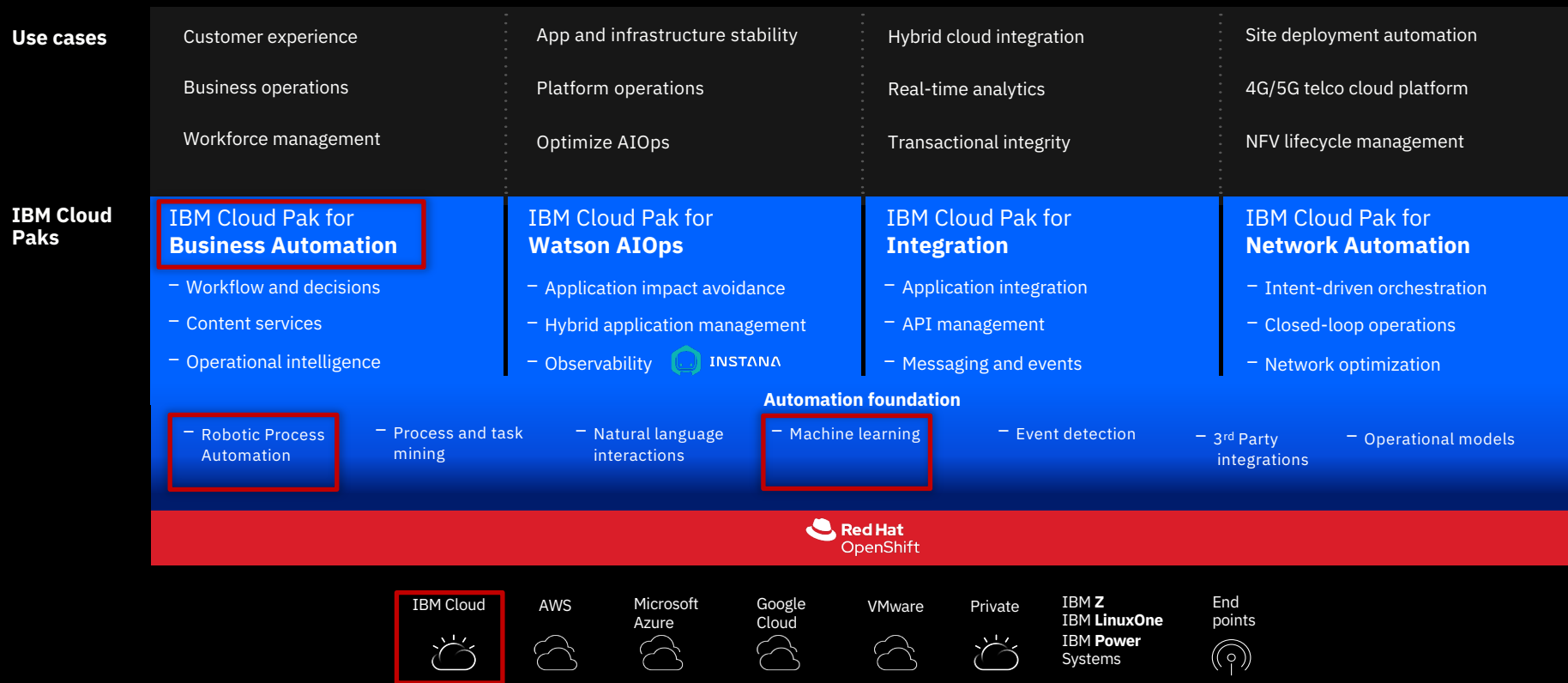
Watson

Infuse AI for business throughout our software



IBM Automation platform

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



IBM Cloud Pak for Business Automation

 AI-Powered/Intelligent Automation

Low-code applications

Automation accelerators



Process mining and modeling



RPA and digital labor



Operational intelligence

Core automation



Document processing



Workflow



Decision management



Content services

AI and machine learning

Automation foundation

— Robotic Process Automation

— Process and task mining

— Natural language interactions

— Machine learning

— Event detection

— 3rd Party integrations

— Operational models



IBM Cloud



AWS



Microsoft Azure



Google Cloud



VMware



Private

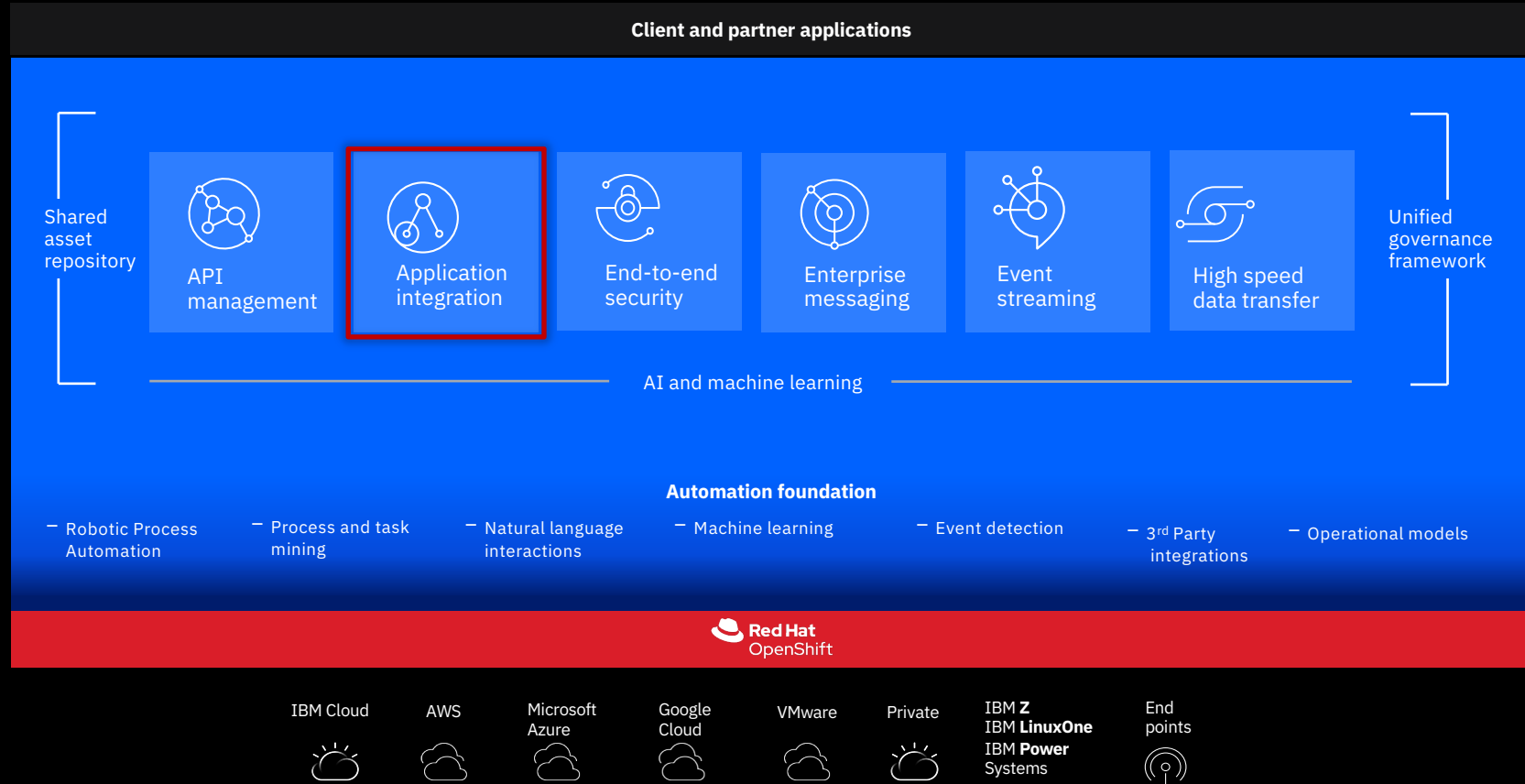


IBM Z
IBM LinuxOne
IBM Power Systems

End points



IBM Cloud Pak for Integration



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Intelligent Client Onboarding Scenario – Introduction

IBM Automation platform






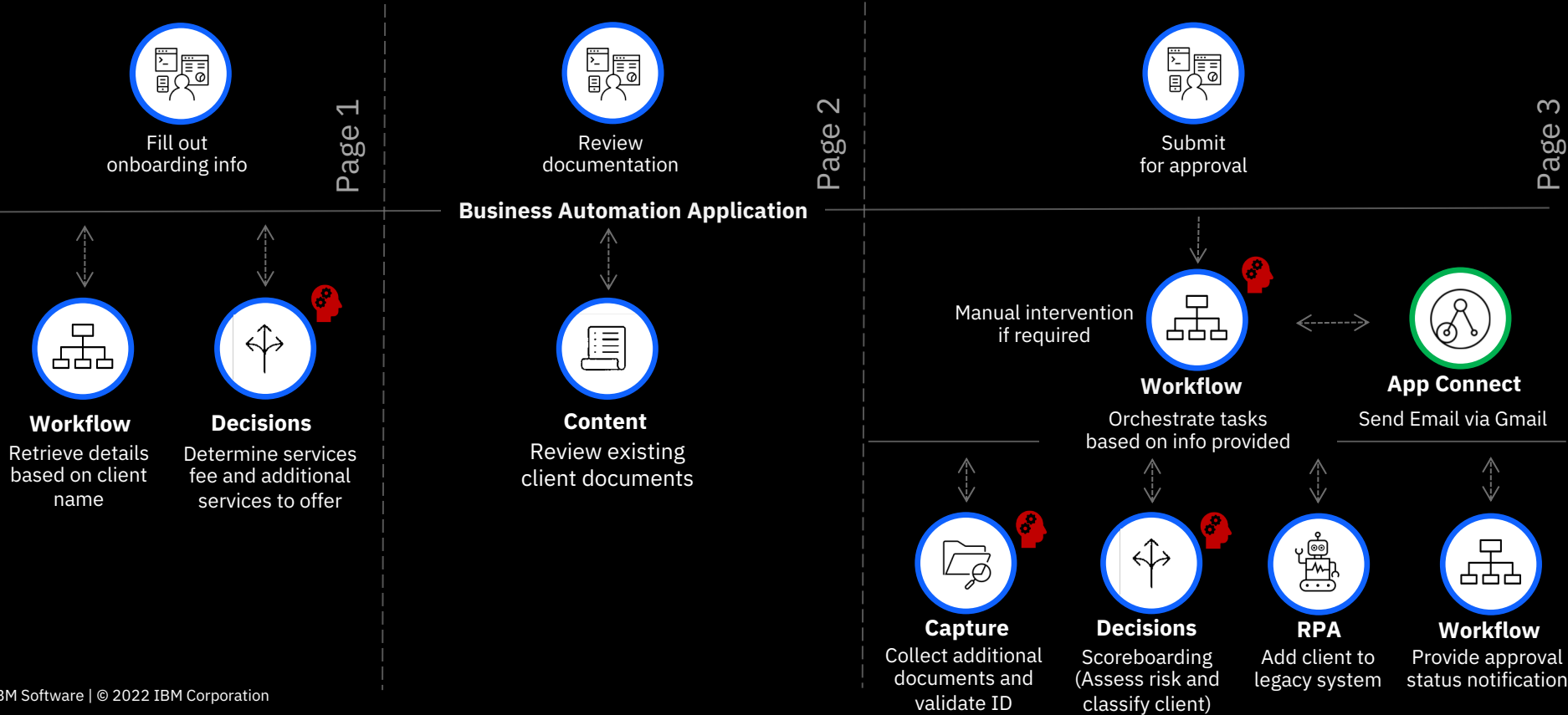
- Focus Corp is a service provider across various industries such a Finance, Healthcare and more
- The Client Onboarding use case utilizes multiple business automation capabilities in the IBM Cloud Pak for Business Automation to digitize business operations
- Features
 - AI-powered intelligent automation
 - 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

-  Intelligent Automation
-  Business Automation
-  Integration



Demo

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



Tracks

Different tracks to cater for different target groups and previous levels of exposure to Cloud Pak 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 (restricted number of participants)**

- 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

Labs



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

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

Bring-up (Install & Config) [12 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 IBM Cloud 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>)
- Let us know in Slack channel #cp4ba-tech-jam-bring-up (<https://ibm-cloudpak-partners.slack.com/archives/C03LJFJBQ4W>) that you are interested in this lab, and you need access to an OpenShift cluster
- One of the SWAT team members will help you with that

Name	Status	Ready	Restarts	Owner	Memory	CPU	Created
create-secrets-job-fc7q	Completed	0/1	0	create-secrets-job	-	-	Mar 7, 2022, 1:45 AM
ib-core-operator-controller-manager-11889c65c-vrgh	Running	1/1	0	ib-core-operator-controller-manager-11889c65c	44.5 MiB	0.030 cores	Mar 6, 2022, 2:27 PM
ib-eventprocessing-operator-controller-manager-64b6c7958p67w	Running	1/1	1	ib-eventprocessing-operator-controller-manager-64b6c7958	31 MiB	0.006 cores	Mar 6, 2022, 2:57 PM

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



Client Onboarding

Focus Corp

Client Rep

Focus Corp offers services in multiple industries. Select the industry for which the services are being offered.

Industry

Federal

Look for client information using the auto-complete and click on the Search button to get their information.

Client Name

Automation Elite Inc.

Search

Client Information

Enter the information of the client being onboarded.

Information to get in touch with the client.

Additional client information.

Establishment Date

25 years

Number of Employees

350

Annual Revenue

\$ 2,750,000.00

Payment History

No Defaulted Payments

Select the services that the client is interested in.

Services Requested

☒ Education Funding

☒ Green Technology Equipment

☒ Infrastructure Consultation

☐ Transport Security

Get Service Fees

Service Fees

\$ 1,600.00

Additional services the client may be interested in

Transport Security

Review Documents

Business Automation Insights (BPC) [1 hour]



■ Abstract

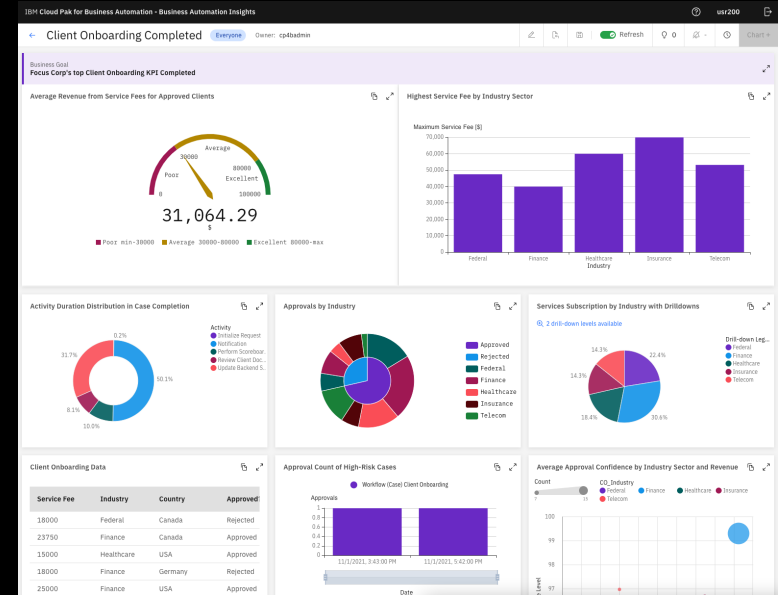
- In this lab exercise you will use Business Performance Center (BPC) as part of Business Automation Insights (BAI) to create a business dashboard that will enable business users to get real time business insights into their client onboarding business.

■ 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

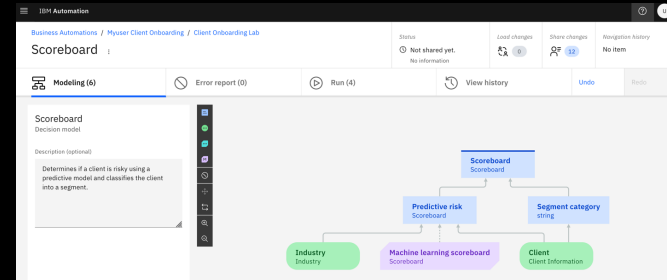
- Create and manage business decisions based on client onboarding solution data
- Infuse intelligence by adding a predictive model into a decision service
- Connect a decision service to a GitHub repository

■ 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



FileNet Content Services [6 hrs.]



▪ Abstract

- Content Platform Engine (CPE) is 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
- 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



Process Mining [3 hrs.]



■ Abstract

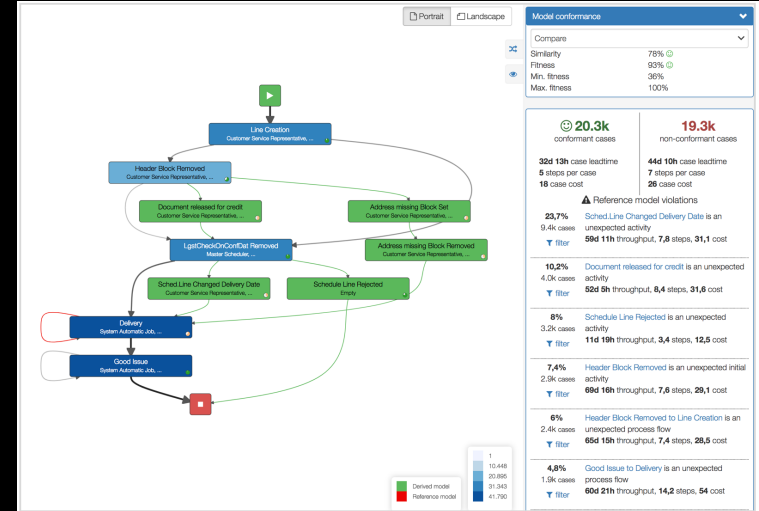
- Explore and master the power of IBM Process Mining and learn how to apply it to real business scenarios

■ Objective

- Master the basics and some of the key advanced Process Mining features
- Learn how to use Process Mining to identify business improvement and automation opportunities

■ Features Exercised

- Creation of new project 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 discovery automation ROI
- Learn how use IBM Process Mining to simulate IBM Blueworks Live processes



Robotic Process Automation [3.5 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. Finally, you will use IBM RPA Studio to develop a chatbot to allow the client to manage some of the client information through themselves.

▪ 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 automate a web application
- Learn how to invoke a bot script from a Workflow process using the IBM RPA REST API
- Learn how to use IBM RPA Studio to develop a chatbot and expose it externally through a chat mapping configuration

▪ Features Exercised

- IBM RPA Studio
- Recorder
- IBM RPA REST API
- BAW integration with IBM RPA
- Chatbot



Workflow [5 hrs.]



▪ Abstract

- Combination of Case and Process capabilities into a unified Workflow offering
- Create a client onboarding solution that contains different activities

▪ Objective

- Understand the basics of Workflow
- Learn how Case and Process integrate together
- Build UIs for human services
- Leverage services from other capabilities in the platform
- Publish services built in Workflow to the platform

▪ Features Exercised

- Case & Process integration using toolkit views and JavaScript API
- UI creation using Coaches and Client-side human services
- Case Builder, Process Designer & Case Client
- Automation Services
- External Services

Survey



<https://www.surveymonkey.com/r/CP4BATechJam2022>



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				

