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

We start at 9:15am UTC+5:30h
(Indian Standard Time)

Bu Feng Hou
Zhong Tao Gao
Ke Feng Shao

IBM Cloud Pak for Business Automation SWAT

Agenda

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

Agenda

- **Who, why and what**

- Jam Agenda

- Logistics

- Cloud Pak for Business Automation

- Scenario
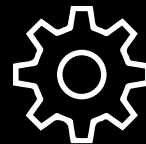
Who, Why, What

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

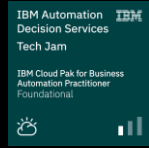## Why

- Learn & enable
- Share experiences
- Get connected

What

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

Agenda

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- Logistics
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Jam Agenda – {APAC}

IBM Cloud Pak
for Business
Automation

General Practitioner
Foundational

IBM Process
Mining

IBM Cloud Pak for Business
Automation Practitioner
Foundational

IBM Robotic
Process
Automation

IBM Cloud Pak for Business
Automation Practitioner
Foundational

IBM Automation
Decision Services
Tech Jam

IBM Cloud Pak for Business
Automation Practitioner
Foundational

IBM Business
Automation
Workflow

IBM Cloud Pak for Business
Automation Practitioner
Foundational

IBM Filenet
Content
Manager

IBM Cloud Pak for Business
Automation Practitioner
Foundational

IBM Business
Automation
Application

IBM Cloud Pak for Business
Automation Practitioner
Foundational

		Activity – Time Zone GMT+5:30h (Indian Standard Time) WebEx: https://ibm.webex.com/ibm/j.php?MTID=m6e5cf4805d856b0d98ec792f1ef3442e	
Day 1	AM	▪ 09:00 [All] Arrival & etc. ▪ 09:10 [Zhong Tao Gao] Welcome Note ▪ 11:45 [All] Choose & provision scenario	▪ 09:30 [Zhong Tao Gao] Scenario Overview
	PM	▪ 13:00 [All] Start scenario implementation ▪ 17:00 [Zhong Tao Gao] Close Day 1	
Day 2	AM	▪ 09:00 [Zhong Tao Gao] Day 2 kick-off ▪ 09:30 [All] Continue scenario implementation	▪ 11:00 [Joshua Zhang]Workflow Process Service
	PM	▪ 13:00 [All] Continue scenario implementation ▪ 17:00 [Zhong Tao Gao] Close Day 2	▪ 13:30 [Rocky Su & Jie Ke] Watson Orchestrate (WO)
Day 3	AM	▪ 09:00 [Zhong Tao Gao] Day 3 kick-off ▪ 09:30 [All] Complete scenario implementation	▪ 11:00 [Stella Zhang] Automation Document Processing
	PM	▪ Survey: https://www.surveymonkey.com/r/CP4BATechJam2022 ▪ 15:00 [Zhong Tao Gao] Feedback / Open Discussion / Q&A & Closure	

Agenda

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

Logistics – {APAC}

Dates
APAC [GMT+5:30h]: Tuesday April 26th to Thursday 28th [9:00am – 5:30pm]

Logistics	Participants	Technical Team

Logistics

Hosts:
Bu Feng Hou, Zhong Tao Gao, Ke Feng Shao

WebEx:
https://ibm.webex.com/ibm/j.php?MTID=m6e5cf4805d8
56b0d98ec792f1ef3442e

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

Participants

- Participants: 110

| Business Partners | 46 |
| IBMers | 64 |

Countries Represented: [16]
- Australia, China, India, Indonesia, Japan, Korea, Malaysia, Mexico, New Zealand, Philippines, Singapore, Spain, Thailand, Turkey, US, Vietnam

Technical Team

APAC

- Zhong Tao Gao (Infrastructure, BAA, Process Mining)
- Ke Feng Shao (BAW, BAI, Content)
- Bu Feng Hou (CP4BA, RPA, Process Mining)

- **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

Agenda

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- Logistics
- **Cloud Pak for Business Automation**
- Scenario

The IBM hybrid cloud software approach

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

Solutions, products and applications

Watson

Infuse AI for business throughout our software

Unify and simplify software experiences with seamless integration of related capabilities

Cloud Paks

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

Red Hat OpenShift **Hybrid cloud platform**

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

Use cases

Customer experience	App and infrastructure stability	Hybrid cloud integration	Site deployment automation
Business operations	Platform operations	Real-time analytics	4G/5G telco cloud platform
Workforce management	Optimize AIOps	Transactional integrity	NFV lifecycle management

IBM Cloud Paks

IBM Cloud Pak for Business Automation
- Workflow and decisions
- Content services
- Operational intelligence

IBM Cloud Pak for Watson AIOps
- Application impact avoidance
- Hybrid application management
- Observability **INSTANA**

IBM Cloud Pak for Integration
- Application integration
- API management
- Messaging and events

IBM Cloud Pak for Network Automation
- Intent-driven orchestration
- Closed-loop operations
- Network optimization

Automation foundation

| - Robotic Process Automation | - Process and task mining | - Natural language interactions | - Machine learning | - Event detection | - 3rd Party integrations | - Operational models |

Red Hat OpenShift

| IBM Cloud | AWS | Microsoft Azure | Google Cloud | VMware | Private | IBM **Z** IBM **LinuxOne** IBM **Power** Systems | End points |

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

Red Hat OpenShift

IBM Cloud

AWS

Microsoft Azure

Google Cloud

VMware

Private

IBM **Z**
IBM **LinuxOne**
IBM **Power** Systems

End points

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Intelligent Client Onboarding Scenario – Introduction
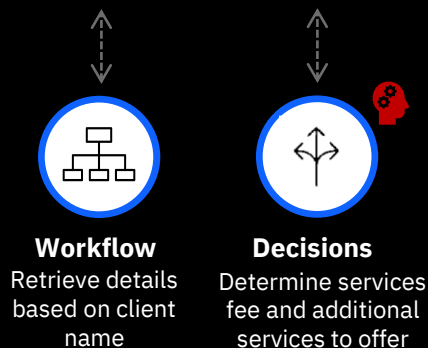## IBM Automation platform

- 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
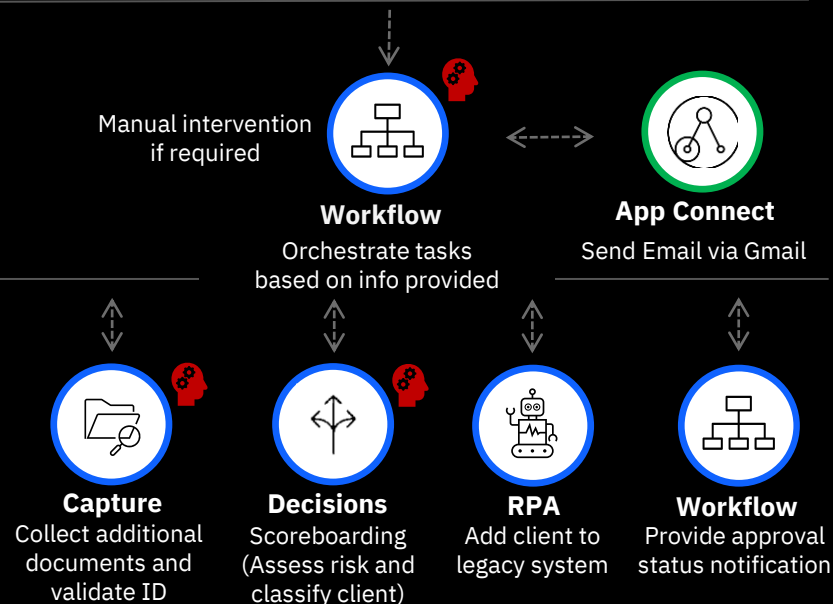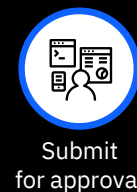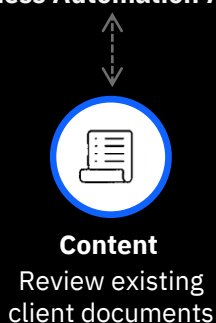
Intelligent Client Onboarding Scenario Flow
IBM Automation Platform

Intelligent Automation
Business Automation
Integration

Fill out onboarding info

Review documentation

Submit for approval

Page 1

Page 2

Page 3

Business Automation Application

Workflow
Retrieve details based on client name

Decisions
Determine services fee and additional services to offer

Content
Review existing client documents

Manual intervention if required

Workflow
Orchestrate tasks based on info provided

App Connect
Send Email via Gmail

Capture
Collect additional documents and validate ID

Decisions
Scoreboarding (Assess risk and classify client)

RPA
Add client to legacy system

Workflow
Provide approval status notification

IBM Software | © 2022 IBM Corporation

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 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 (Bring-up planned separately)**
  - 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: Instructions & automation scripts to install and configure CP4BA

Labs

- End-to-End (end-user view)

- 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

IBM Cloud Pak **IBM**
for Business
Automation

General Practitioner
Foundational

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/Skytap 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)
  - Reserve a Cluster on Techzone (https://techzone.ibm.com/collection/ibm-cloud-pak-for-business-automation-demos-and-labs-bring-up-lab)

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

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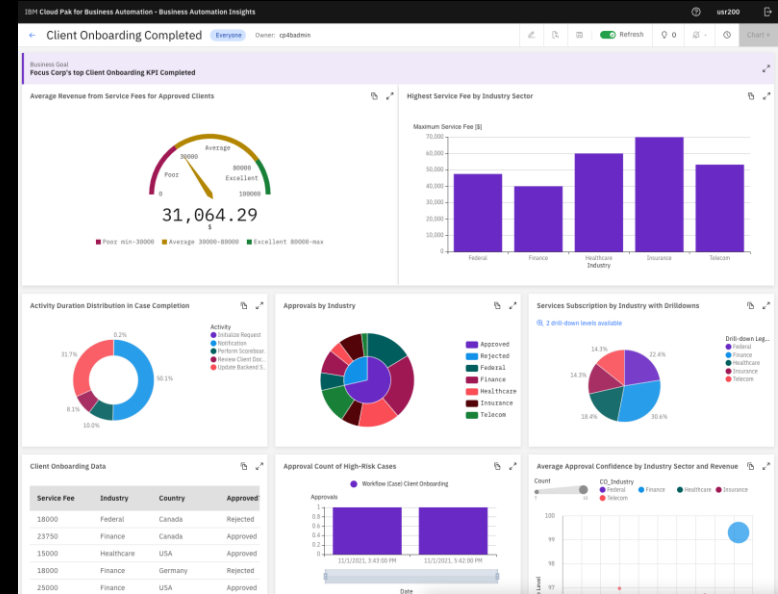
# Decisions (Automation Decision Services) [3 hrs.]

- **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
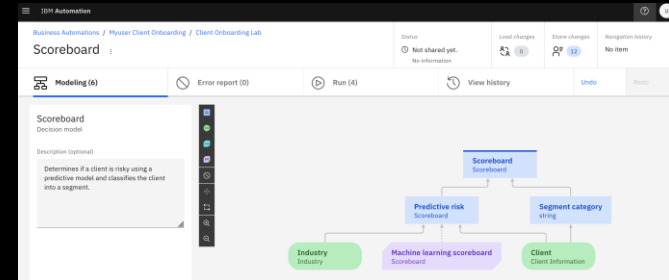
FileNet Content Services [6 hrs.]

- **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

IBM Filenet
Content
Manager

IBM Cloud Pak for Business
Automation Practitioner
Foundational

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 form 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
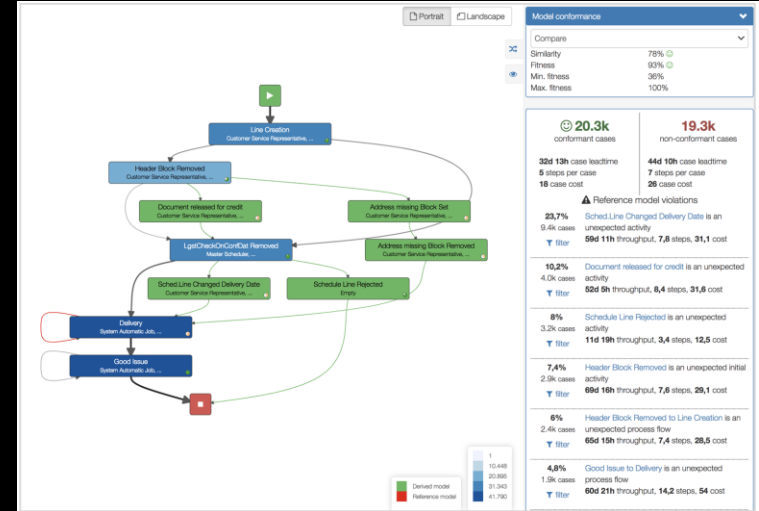
Robotic Process Automation [3 hrs.]

- **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
  - IBM Business Automation Workflow integration with IBM RPA

IBM Robotic
Process
Automation

IBM Cloud Pak for Business
Automation Practitioner
Foundational

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

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 |