

IBM Cloud Pak for Business Automation Tech Jam {Americas} – October 17-19, 2023

We start at 9:05am UTC-4:00h
(Eastern Daylight Time)



Tom Al-Hamwy
Program Director, Business Automation SWAT

Jorge Rodriguez
STSM, 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



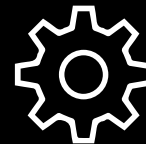
Who

- 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



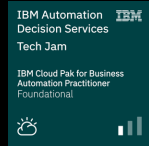
What

- 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/meet/talhamwy			
Day 1	AM	<ul style="list-style-type: none"> 09:00 [All] Arrival & etc. 09:05 [Tom Al-Hamwy] Welcome Note 11:45 [All] Choose & provision scenario 	<ul style="list-style-type: none"> 09:30 [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 	<ul style="list-style-type: none"> 15:00 [Bill Lawton] Business Automation Roadmap 2023
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 [Jacob Vincent] watsonx Orchestrate
	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"> 14:00 [Allen Chan] Generative AI & Automation
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"> 14:00 [Paul Pacholski] Consuming AI in Workflow
	PM	<ul style="list-style-type: none"> Survey: https://www.surveymonkey.com/r/CP4BATechJam2023 15:00 [Tom Al-Hamwy] Feedback / Open Discussion / Q&A & Closure 	

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Logistics – {Americas}

Dates

Americas [GMT-4:00h]: Tuesday October 17th to Thursday 19th [9:00am – 5:30pm]

Logistics

Hosts:

- Americas: Tom Al-Hamwy, Jorge Rodriguez

WebEx:

- Americas: <https://ibm.webex.com/meet/talhamwy>

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: **84**
- Registrants: **103**

Business Partners 0
IBMers 84
CSM[27] | SU[17] | CE[17] | TS[17] | Other[6]

Countries Represented: [9]

- Argentina, Brazil, Canada, Chile, Colombia, France, Peru, UAE, USA

Technical Team

Americas

- Alain Robert (ADS)
- Harrish Narayanan (Content, Infrastructure)
- Jorge Rodriguez (CP4BA, Infrastructure, BAW, ADS, BAA)
- Paul Pacholski (BAW, RPA, BAI, Process Mining, watsonx Orchestrate)
- Sundeeep Anne (CP4BA, Content, Document Processing)

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

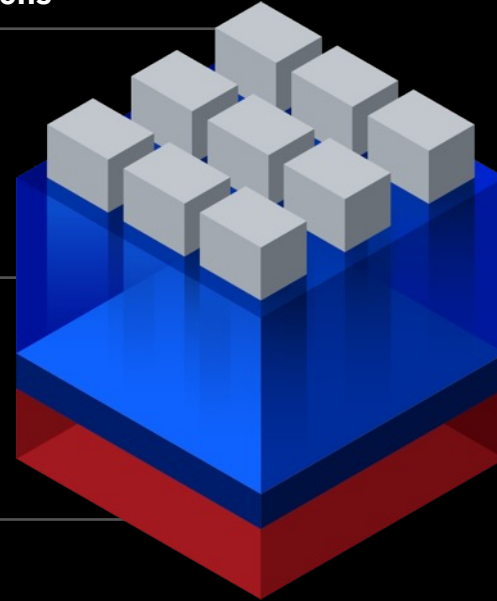
Enable software to run anywhere, on any cloud, as agile cloud-native services

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

Use cases

Customer experience

Business operations

Workforce management

App and infrastructure stability

Platform operations

Optimize AIOps

Hybrid cloud integration

Real-time analytics

Transactional integrity

Site deployment automation

4G/5G telco cloud platform


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



IBM Cloud



AWS



Microsoft Azure



Google Cloud



VMware



Private

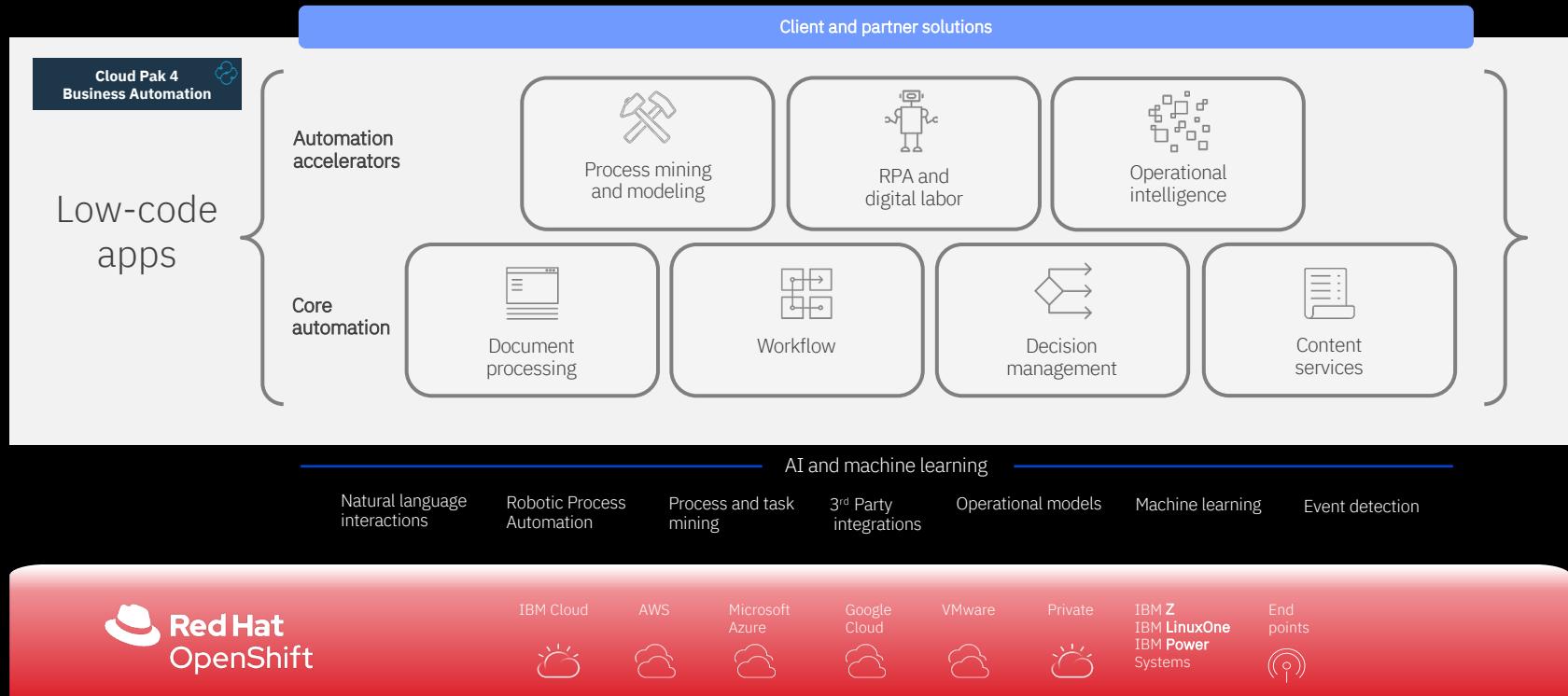


IBM Z
IBM LinuxOne
IBM Power Systems

End points



IBM Cloud Pak for Business Automation



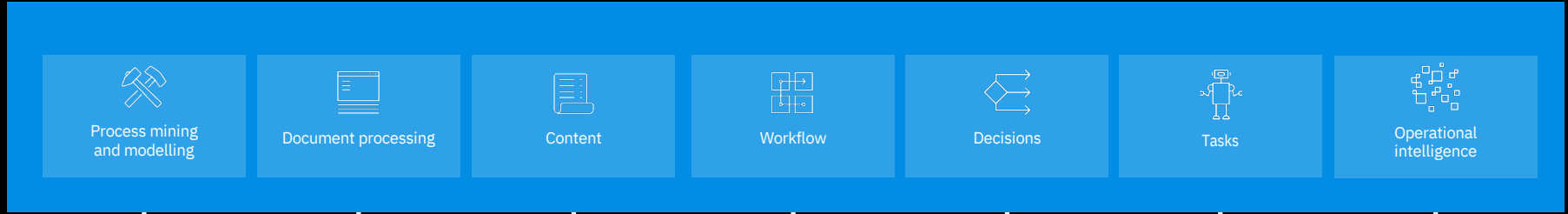
Business Automation from IBM



Stand-alone component



Package



Infuse with AI services

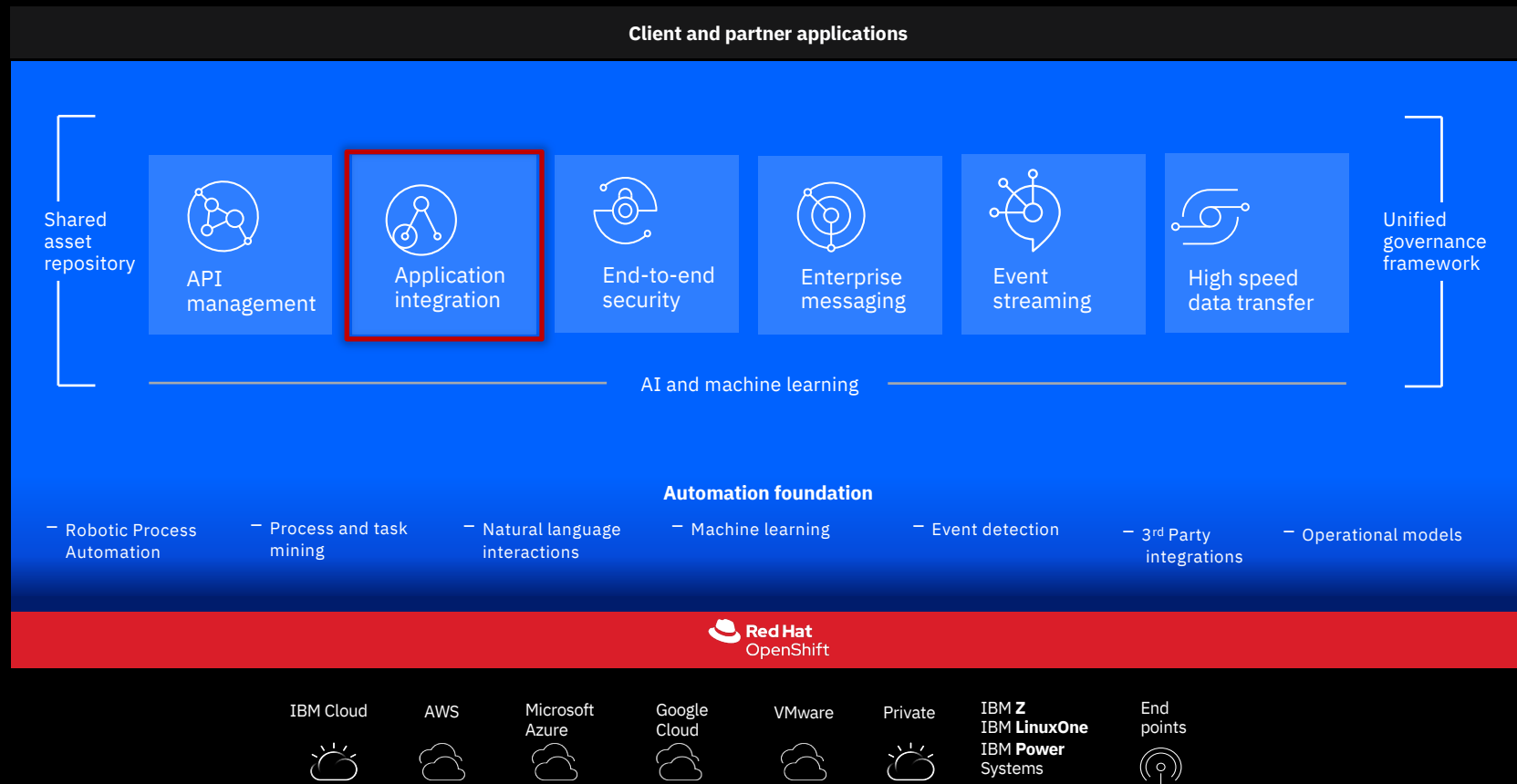


On-premises



Cloud

IBM Cloud Pak for Integration



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Intelligent Client Onboarding Scenario – Introduction

IBM Automation platform






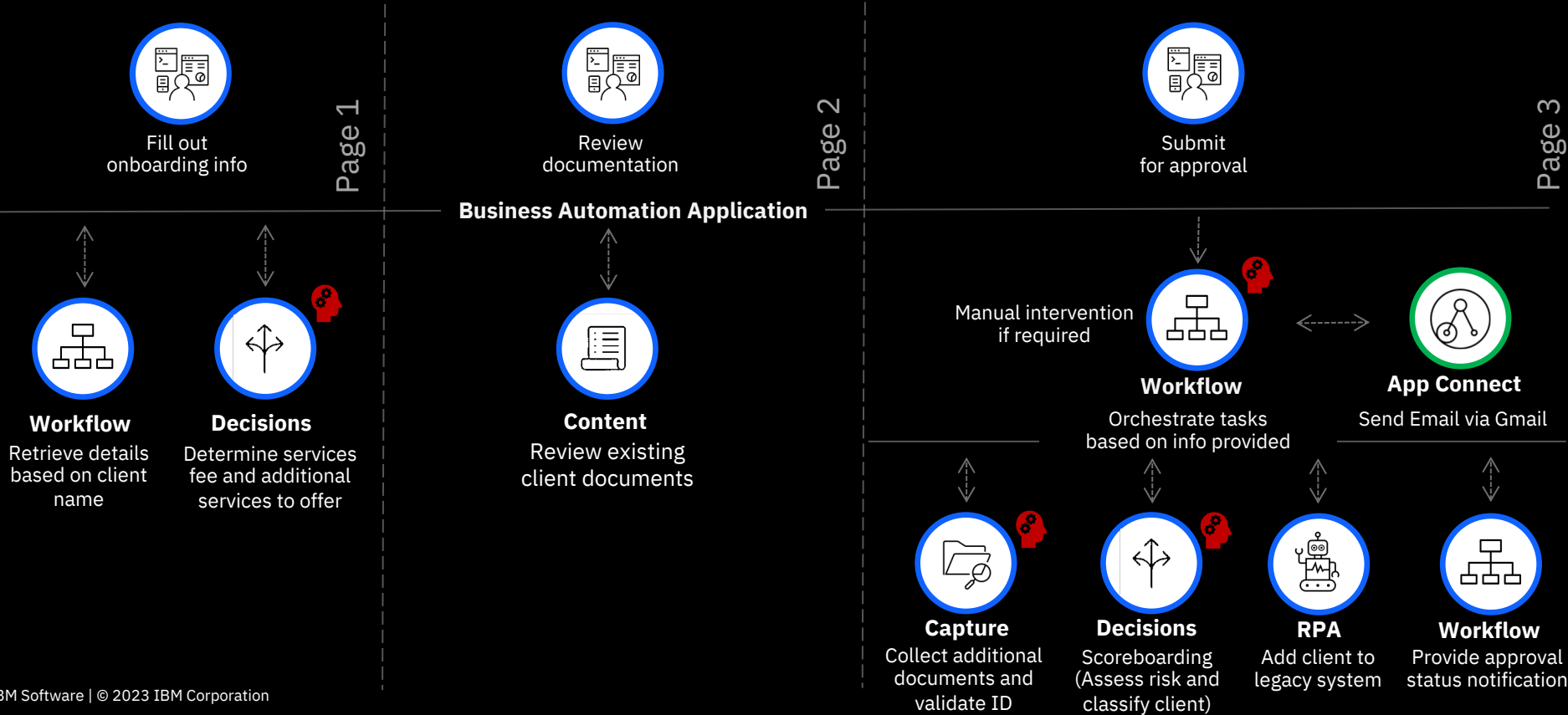
- Focus Corp is a service provider across various industries such a Finance, Healthcare and more
- The Client Onboarding use case utilizes multiple business automation capabilities in the IBM Cloud Pak for Business Automation to digitize business operations
- Features
 - AI-powered intelligent automation
 - Straight-through processing and knowledge worker review
 - Usage of low-code apps, RPA, workflow, decisions and content
- Assets are used for enablement (Tech Jams, Jam-in-a-Box), 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)
- Automation Document Processing (ADP)
- Business Automation Application (BAA)
- Business Automation Insights (BAI)
- Decisions - Automation Decision Services (ADS)
- FileNet Content Services
- Process Mining
- Robotic Process Automation (RPA)
- watsonx Orchestrate
- 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

Automation Document Processing (ADP) [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



Business Automation Application (BAA) [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

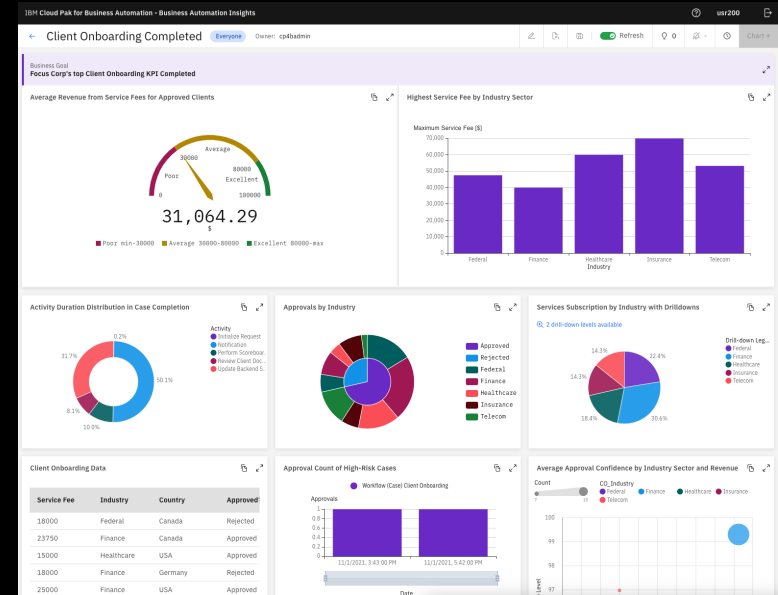
- In this lab exercise you will use Business Performance Center (BPC) as part of Business Automation Insights (BAI) to create a business dashboard that will enable business users to get real time business insights into their client onboarding business.

■ 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 (ADS) [3 hrs.]



■ Abstract

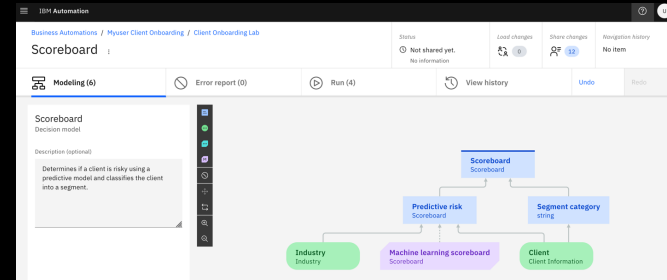
- Create and manage business decisions based on client onboarding solution data
- Infuse intelligence by adding a predictive model into a decision service
- Connect a decision service to a GitHub repository

■ 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 [4 - 5 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
- External Data Service (EDS) feature to validate the document class properties
- Redact Sensitive Information in a Document using Content Redaction
- Search for Document using Search and Simple Search features
- Edit services client feature to integrate with Microsoft local desktops Apps



Process Mining [1 -2 hrs. per lab]



■ Abstract

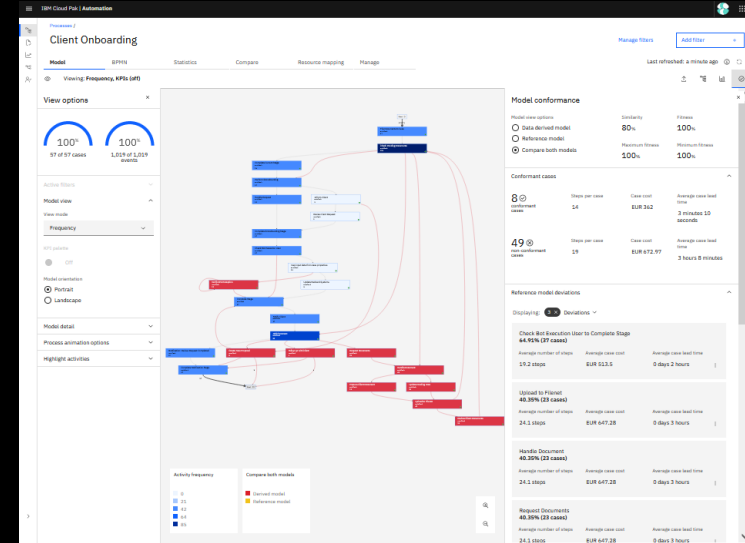
- Using the event data from the Client Onboarding scenario, explore and master the power of IBM Process Mining and learn how to apply it to real business scenarios
- Explore other labs not related to the Client Onboarding scenario. The labs include Task Mining, other business scenarios, and several technical topics

■ 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
- Explore Task Mining from user and developer point of view



Robotic Process Automation (RPA) [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



watsonx Orchestrate [2-3 hrs.]



■ Abstract

Focus Corp's quarterly services upsell initiative is critical to demand generation; however, it is increasingly difficult to manage and execute. Quarterly sales campaigns are time-consuming and ineffective. It takes over ten weeks to complete quarterly promotions. Due to time limitations, the sales team cannot include all eligible customers. Managers are looking for a faster and more effective way of launching upsell offers.

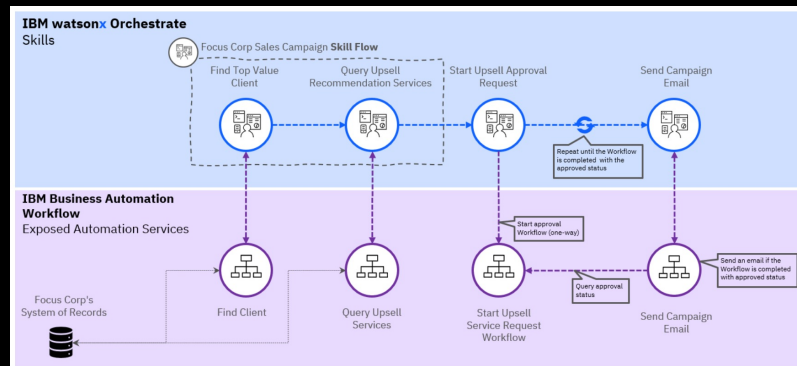
In this lab, you will build an IBM watsonx Orchestrate solution that re-imagines the quarterly promotions process. You will be re-using the existing IT assets to author an intelligent, AI-driven solution that pulls customer data from the system of records and creates targeted emails.

■ Objectives

- Gain basic knowledge of IBM watsonx Orchestrate
- Learn how to use IBM watsonx Orchestrate to build an intelligent AI-driven solution by re-using existing IT assets

■ Features Exercised

- Import existing IBM Business Automation Workflow automations as custom watsonx Orchestrate skills
- Enhance custom IBM watsonx Orchestrate skills
- Build a skill flow to enhance and further automate the solution
- Adding skills / composite skills from the Skill Catalog and using them to perform work
- Learn the basics of administration of IBM watsonx Orchestrate



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/CP4BATechJam2023>



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				

