

Cloud Pak for Business Automation:

Tech Jam 19 July 2021 – Sales Track – Part II

Sales Play

Conversation Guides

Sizing Tools

Eval Request

Proposal Guides

Certification Badges

Demo Links



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Cloud Pak for Automation: Components and deployment options

Business Automation Workflow	FileNet Content Manager	Operational Decision Manager	Robotic Process Automation with WDG Automation
Datacap	Enterprise Records	Content Collector	Process Mining
Automation Document Processing	Business Automation Insights	Automation Workstream Services	
Business Automation Studio	Application Designer	Automation Decision Services	
 Traditional and containerized	 Traditional on-premises	 Cloud native containerized	

Intelligent Automation Sales Play



Value Proposition	Realized By
Reduce dependency on human labor	<ul style="list-style-type: none"> • Digital Worker strategy • Improved accuracy and efficiency by offloading human work
Deliver Automation Applications more quickly with minimal IT dependency	<ul style="list-style-type: none"> • Empower LOB with low code tooling • Build & deploy automation applications faster
Improve customer experience	<ul style="list-style-type: none"> • Faster cycle times • Digital self-service • Process transparency
Better business outcomes	<ul style="list-style-type: none"> • Real-time operational transparency • Improved decision making infused with AI/ML

Target Audience

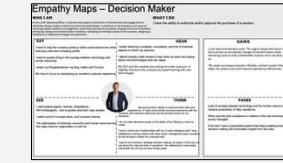
Buyer Persona:

- Identify executives or line of business owners in an organization where value proposition resonates



Empathy Map:

- Understand the driving forces for those personas and how they map to DBA



[Details on Seismic](#)

Intelligent Automation Sales Play – Sales Tactics

Prospecting Questions:

- How effective are your teams at focusing on "high value work" that they were hired for?
- Can the line of business effect change without reliance on IT?
- How do you leverage content to help improve customer experience?
- Are you able to effectively visualize your operations in real time and apply automation to improve business outcomes?



Seller Actions:



- Pull install list of Workflow, Content, Decisions - discuss the value of real time visualizations in BAI and how it forms a foundational data lake for AI / ML in the future
- Share our investment initiatives (Digital Worker, Automation Studio, Application Designer, etc.) included in Cloud Pak for Automation
- Always lead with Cloud Pak for Automation

Automation Modernization Sales Play

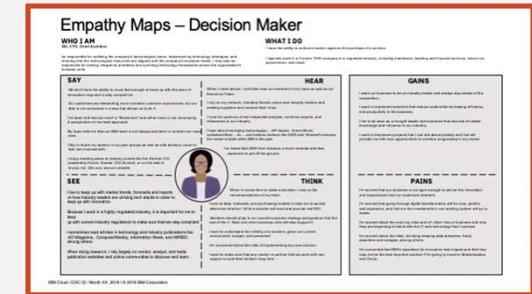


Value Proposition	Realized by
Improve business agility	<ul style="list-style-type: none"> Digitize work (Decisions, Content, Workflows) for operational efficiency Reduce time and effort to build and manage automation applications
Improve Performance of your Automation Applications	<ul style="list-style-type: none"> Manage fault tolerant and self-healing environments with isolation, replication and health checks based on containers
Lower Total Cost of Ownership	<ul style="list-style-type: none"> App Servers, Operating Systems, Hypervisors and Hardware savings Flexibility to deploy multiple capabilities under a single license Kubernetes technology (openshift) provided with the Cloudpak at no cost Scale IT productivity and empower LOB with low code

Buyer Persona

Responsible for outlining the company's technological vision. implement technological strategies defining IT architecture frameworks across the organization

Empathy Map:



- Understand the driving forces for those personas and how they map to DBA

[Details on Seismic](#)

Automation Modernization Sales Play – Sales Tactics

Prospecting Questions:

- How does your microservices and container strategy applies to business automation?
- How does your automation change management policy leverage containerization?
 - How do you create/deploy/copy/move/scale automation workloads?
 - Does your strategy cope with modern and agile automation lifecycles?
- Looking for real cost savings implementing your microservices strategy?
- What is your disaster recovery strategy for automation?
 - Can you meet SLAs in a scaling business environment?



Seller Actions:

- Pull install list of Openshift and ICP accounts - discuss the value of our Digital Business Automation as a key component of their Microservices and Containerized architectures
- Trade-up current individual capabilities to Cloud Pak for Automation
- Share our investment initiatives (RPA, Business Automation Insights, Low Code / No Code, Digital Worker) included in Cloud Pak for Automation
- Lead with the Cloud Pak for Automation



IBM CLOUD PAK FOR BUSINESS AUTOMATION
Prepare Conversation Starters

Keep it simple. Keep it educational. Focus on customer needs.

- I would like to understand your company's current automation initiatives and tell you a little about what we have been seeing in your industry.
- Many of our clients are saving significant money and remaining competitive in these challenging times by easily scaling business operations to react to changes in demand. I would like to discuss some of the best practices and approaches we are seeing.
- I would like to talk to you about how automation can improve productivity while employees are working remotely.
- Many of our customers are improving their automation solutions by digitizing their content which makes documents accessible and actionable by their business operations teams. I'd like to talk about how content is used in your business.
- I would like to share some updates we have made to our automation platform including new low code application development capabilities that will add value to your existing investments.

Prepare Discovery Questions – Line of Business (LOB) Leaders

The purpose of this section is to guide conversations with LOB leaders (whitespace and existing customers) and help match customer requirements to the DBA entry points.

Position **Cloud Pak for Business Automation** as the industry's leading business automation platform containing the most complete set of automation capabilities and business-friendly tooling.

QUESTIONS FOR WHITESPACE AND EXISTING CUSTOMERS

- Do your business processes take too long to execute due to high levels of manual intervention? Does this make it difficult to scale due to spikes in customer demand?
- Could your customer service benefit from intelligent automation capabilities that can understand and analyze a situation in real time?
- Could you benefit by quickly automating repetitive low value tasks, with no technical skills or ramp-up required?
- Do you need a way for customers and employees to capture documents and other information directly from mobile devices?
- Can your remote employees quickly and securely access documents that include sensitive information?
- Is it easy to adapt your applications to constantly changing policies, regulations or customer behavior?
- How does your team prioritize opportunities for process automation to improve business operations?
- How do your teams capture and consolidate operational data for analysis?
- How do your remote teams collaborate on the design and documentation of new business processes? How do you adapt your existing processes to changing conditions?
- Do you have a way to build simple internal automations (e.g., approvals or checklists) without writing code?

Prepare Discovery Questions – IT Leaders

The purpose of this section is to guide conversations with IT leaders (whitespace and existing customers).

The LOB-focused questions on the previous page will also apply since many IT leaders are focused on traditional business outcomes.

Position **Cloud Pak for Business Automation** as the industry's leading business automation platform containing the most complete set of automation capabilities and business-friendly tooling.

QUESTIONS FOR WHITESPACE AND EXISTING CUSTOMERS

- What is your cloud strategy for automation applications?
- Do you have a container strategy for new workloads?
- Which cloud infrastructure do you use today (i.e., OpenShift, AWS EKS, Pivotal)?
- What is your approach to reducing operational costs and better scaling workloads?
- How do you handle the systems administration of your automation applications?
- Are you able to easily provide operational data to your data science teams?
- How do you provide business users the ability to author their own applications using low code/no code technology?
- How do you deal with LOB frustration around meeting their needs / making changes faster?

IBM CLOUD PAK FOR BUSINESS AUTOMATION
Prepare for Client Questions (1/3)

Questions the prospect may ask	Guiding questions the seller can ask the prospect	What to listen for (keywords, phrases)	Primary benefits / Answers to prospect questions
How can I get started with automation?	<ul style="list-style-type: none"> • What business challenges are you looking to solve? • How are you currently using automation in your business? • Do you have manual tasks that could be automated? • Does your customer service suffer because your processes take too long? • Is IT a roadblock to your automation strategy? 	<ul style="list-style-type: none"> • Process modeling • Content management • Business rules • Manual, repetitive tasks • Need to quickly create new apps • Long development timeframes • Existing entitlements 	<ul style="list-style-type: none"> • Easy to get started with visual modeling and low-code tools • Software bots to offload repetitive, error-prone tasks • IBM Services can build a pilot in 4-6 weeks
How can I include AI and machine learning in my automation solutions?	<ul style="list-style-type: none"> • What AI and machine learning tools do you use today? • Do you have tools to help optimize what your employees are doing? • Does your staff spend too much time processing unstructured content (e.g., PDFs, emails) in order to use the data in structured applications? 	<ul style="list-style-type: none"> • AI / machine learning • Operational data • Decision management with predictive analytics • Unstructured data • Document classification • Data lake • Data scientists 	<ul style="list-style-type: none"> • Intelligent document capture with AI-driven classification and extraction • Feed a data lake with operational data for use by AI and machine learning • Integration with Watson Machine Learning for intelligent decision services • Improve employee productivity by automatically recommending ‘next best task’

IBM CLOUD PAK FOR BUSINESS AUTOMATION
Prepare for Client Questions (2/3)

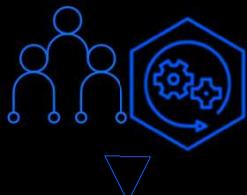
Questions the prospect may ask	Guiding questions the seller can ask the prospect	What to listen for (keywords, phrases)	Primary benefits / Answers to prospect questions
We have too many manual tasks in our business operations. How can I reduce the amount of manual work?	<ul style="list-style-type: none"> Tell me about your manual operations - are they simple and repetitive? Does your staff have to spend time making repeatable decisions that could be automated? If you could automate time consuming, error-prone processes in your operations, what impact would that have? 	<ul style="list-style-type: none"> Manual, repetitive work Decisions that can be automated Waiting on approvals 	<ul style="list-style-type: none"> Automate manual processes with straight-through processing Quickly respond to changing market conditions by automating repeatable decisions Use software robots to offload repetitive tasks
I have several content management repositories. How do I integrate them with my other automation capabilities?	<ul style="list-style-type: none"> Would it be beneficial to have a federated view of all your repositories? Are your repositories cloud or on-premises? What added features would be valuable for you to gain from your content? What are your retention and disposition needs? 	<ul style="list-style-type: none"> Federation Multiple repositories Records management Document capture Retention Disposition 	<ul style="list-style-type: none"> Access all your repositories through a common interface Perform operations across all repositories, such as search Extract data from structured and unstructured documents

IBM CLOUD PAK FOR BUSINESS AUTOMATION
Prepare for Client Questions (3/3)

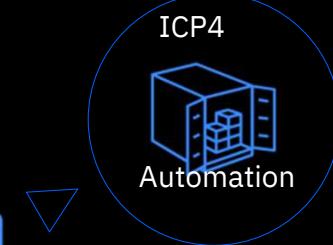
Questions the prospect may ask	Guiding questions the seller can ask the prospect	What to listen for (keywords, phrases)	Primary benefits / Answers to prospect questions
There's been a lot of buzz around IBM acquiring Red Hat? How will that help my automation?	<ul style="list-style-type: none"> • What is your container strategy? • How do you provision, manage and scale applications? • Do containers take too much of your time to manage? 	<ul style="list-style-type: none"> • Containers • Systems administration • Pay for what you use • Open source • Virtualization • Red Hat OpenShift 	<ul style="list-style-type: none"> • Red Hat OpenShift reduces systems administration issues related to building and deploying containerized applications • Flexibly implement and manage automation solutions with Cloud Pak for Automation • Easily scale to market demand by having infrastructure in place and flexible usage-based pricing
All my applications are currently on premises. How do I start my move to an IBM-managed cloud?	<ul style="list-style-type: none"> • What is your cloud strategy? • Is your company trying to reduce your reliance on company-owned datacenters? • How long does it take you to deploy a new application or scale up an existing application? • Have you identified target business operations that could be moved to the cloud? 	<ul style="list-style-type: none"> • SaaS • Speed of deployment • Cloud strategy • Public, private, or hybrid cloud 	<ul style="list-style-type: none"> • No need to build out IT infrastructure • Rapidly prototype new automation applications • Reduce data center costs and resources • Convert capital expenditures to operating expenditures • Offload software management to IBM (e.g., security patches, software updates, compliance management) • Easily add capacity to meet spikes in demand

3 angles into the Pak for Automation

Pak as in
Digital Business Automation Platform



Pak as in
Digital Business Automation
license packaging



Pak as in
Container platform for Digital Business Automation



3 angles into the Pak for Automation

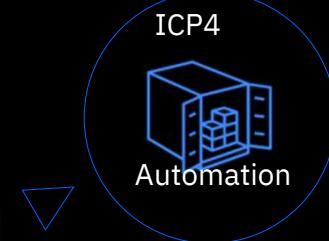
How could Automation improve and transform how we do <e.g. claim management>? Which capabilities would be relevant to our line of business?

Pak as in
Digital Business Automation Platform



We have some licenses of your Automation products and are interested in the pak license? How will the transition to the pak work for us? What are the steps? Upgrade? Migration? Conversion? Lift & shift? Rewrite? Installations?

Pak as in
Digital Business Automation
license packaging



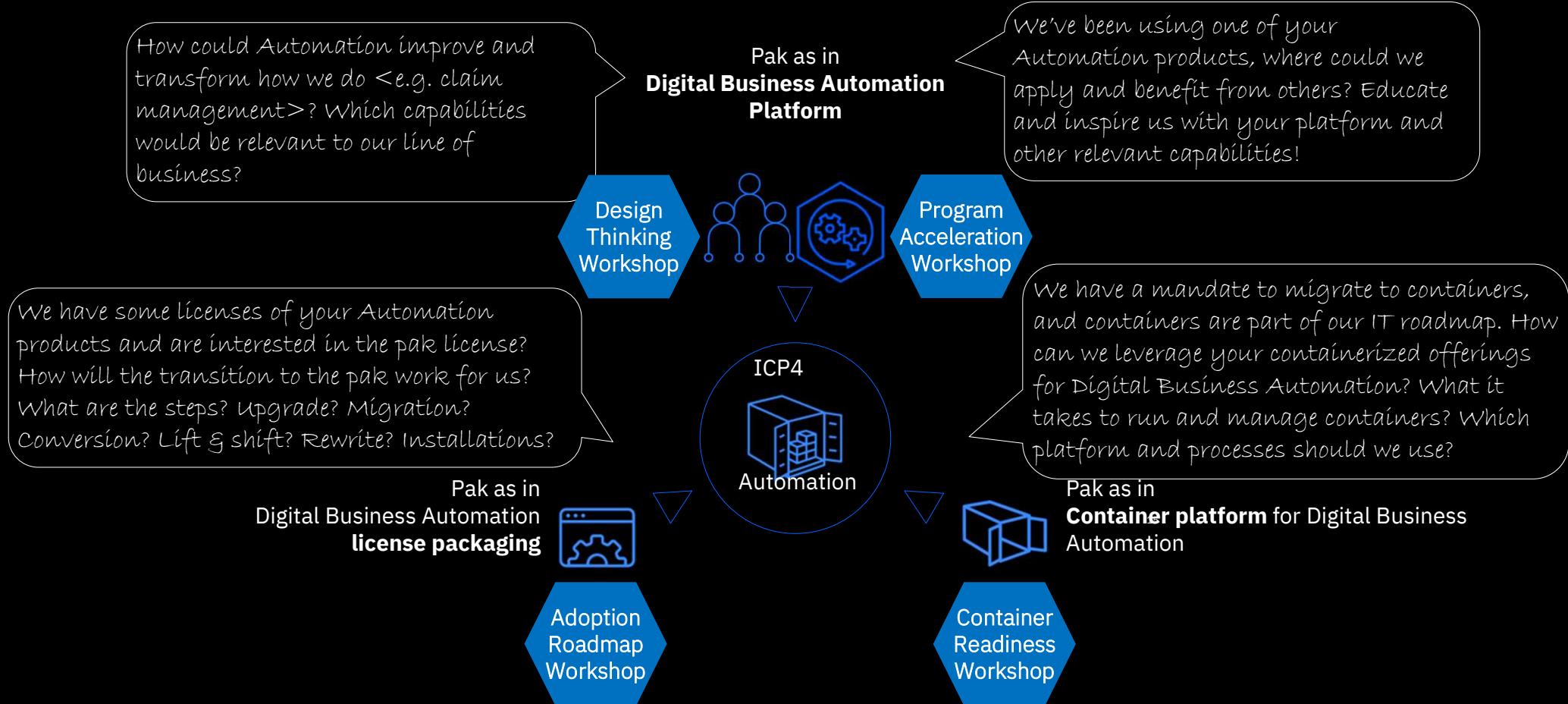
We've been using one of your Automation products, where could we apply and benefit from others? Educate and inspire us with your platform and other relevant capabilities!

We have a mandate to migrate to containers, and containers are part of our IT roadmap. How can we leverage your containerized offerings for Digital Business Automation? What it takes to run and manage containers? Which platform and processes should we use?

Pak as in
Container platform for Digital Business Automation



3 angles into the Pak for Automation



CP4BA Parts Number

Program name/Description	Part number
IBM Cloud Pak for Automation Virtual Processor Core License + SW Subscription & Support 12 Months	D20RULL
IBM Cloud Pak for Automation Virtual Processor Core Annual SW Subscription & Support Renewal 12 Months	E0PMHLL
IBM Cloud Pak for Automation Virtual Processor Core SW Subscription & Support Reinstatement 12 Months	D20RVLL
IBM Cloud Pak for Automation Virtual Processor Core Monthly License	D20RNLL
IBM Cloud Pak for Automation Virtual Processor Core Committed Term License	D267PLL

CP4BA Trade Up Parts Number

Description	Trade-up part number
IBM Cloud Pak for Automation Virtual Processor Core from Eligible Programs Trade Up License + SW Subscription & Support 12 Months	D20RWLL
IBM Cloud Pak for Automation on IBM Z Virtual Processor Core from Eligible Programs on IBM Z Trade Up License + SW Subscription & Support 12 Months	D20RZLL

Cloud Pak for Automation Entitlement Ratios for Capacity Licensing

Component	Production Ratio VPCs to Cloud Pak licenses	Non-Production Ratio VPCs to Cloud Pak licenses
FileNet CM	1:5	2:5
Enterprise Records (Counted with FileNet)		
Business Automation Workflow	1:5	2:5
Operational Decision Manager	1:5	2:5
Automation Decision Services	1:4	1:2
Datacap	1:2	1:1
Content Collector	1:3	2:3
Automation Document Processing	1:1	2:1
Automation Workstream Services	1:5	Not priced
Business Automation Intelligence	1:1	Not priced
Application Engine	1:1	Not priced



Offerings which have Alternate User licensing

Cloud Pak for Business Automation Entitlement - Ratios for User Licensing

Component	Production Ratio Users to 1 VPC	Component	Production Ratio Users to 1 VPC
FileNet CM – Authorized User *	18:1	ICC for Email, Files & SharePoint – Authorized User *	200:1
FileNet CM – Infrequent User **	180:1	ICC EFS – Infrequent User **	2000:1
FileNet CM – Employee user *	36:1	ICC EFS – Employee user *	499:1
FileNet CM – External User	3564:1	ICC EFS – External User	40900:1
BAW – Authorized User	9:1	ICC for SAP – Authorized User	36:1
BAW – Infrequent User	90:1	ICC SAP – Infrequent User	360:1
BAW – Employee User	18:1	ICC SAP – Employee User	72:1
BAW – External User ***	1782:1	ICC SAP – External User ***	6860:1
BAW – Concurrent User	5:1		

* User or Employee User are a binary choice . They cannot be mixed

** Infrequent Users can only be used alongside "User" and not "Employee User"

*** BAW – Concurrent User is only supported for legacy BAW-CU users

Frequently asked questions

User Trade Up thresholds where we recommend Capacity Trade Ups – For Reference – (May change over time)

Component	UVU Threshold
FileNet CM – Authorized User *	1,200
FileNet CM – Employee user *	25,000
FileNet CM – External User	78,000
BAW – Authorized User	1,200
BAW – Employee User	25,000
BAW – External User ***	78,000

Component	UVU Threshold
ICC for Email, Files & SharePoint – Authorized User *	1,200 (changed from 1,000 in Jul 2020)
ICC EFS – Employee user *	50,000
ICC EFS – External User	40,000
ICC for SAP – Authorized User	500
ICC SAP – Employee User	30,000
ICC SAP – External User ***	40,000

There is an exception process for quantity above this. See Trade Up section.

Cloud Pak RPA Conversion ratio summary

Component	Metric	Ratio Metric to 1 VPC
RPA Platform. - 2 Environments - 1 Unattended bot - 2 Attended bots - Unlimited RPA Studio access	Install Instance	1:2
RPA Additional Environments	Virtual Server	1:1
Unattended Bot Agent	Concurrent Connection *	1:1
Attended Bot Agent	Concurrent Connection *	5:1

* A Concurrent Connection is a simultaneous link or association of a database, application, server, or any other type of device which has been or is made available to the Program. Licensee must obtain entitlements for the total number of Concurrent Connections, which have been or are made to the Program.

2 Licenses required for RPA Platform

Process Mining

Hyperautomation from facts

1 VPC =
3 processes, unlimited users,
unlimited events

PROCESS MINING

Form real events logged by enterprise apps

- Discover processes from real work
- Discover lead time, cost, rework, conformance issues
- Discover automation opportunities

Upsell

- RPA
- BAW
- Decisions
- Document Processing

Connection points

- Models from/to Blueworks Live
- Models from/to BAW
- DMN to Decisions
- BAI event logs to analyze BAW

TASK MINING

From human actions

- Discover real work done during an activity
- Automate most frequent action paths with RPA
- Combine process and task mining to analyze different levels of details, and get a complete picture of your process

IBM RPA Offering

	Stand Alone		CP4A (2 VPC)
Component	On Prem Committed Term License (CTL)	SaaS Committed Term License (CTL)	On Prem Committed Term License (CTL) and Perpetual
IBM RPA Base Platform (Mandatory)	One Platform x 1 Environment x Unlimited Studio x 2 Attended Bot x 1 Unattended Bot x Unlimited OCR	One Platform x 1 Environment x Unlimited Studio x 2 Attended Bot x 1 Unattended Bot x Unlimited OCR	One Platform x 2 Environment x Unlimited Studio x 2 Attended Bot x 1 Unattended Bot x Unlimited OCR
Add On Components			
Environment	Yes	Yes	Yes
Attended Bot	Yes	Yes	Yes
Unattended Bot	Yes	Yes	Yes
Chatbot	Coming	Yes	Coming
OCR	Abby and Tesseract And Google Vision (add-on)	Abby and Tesseract And Google Vision (add-on)	Abby and Tesseract And Google Vision (add-on)

Cloud Pak for Automation List Price US

Prices	Committed Term Licenses*	Perpetual + 1 year S&S	Monthly Term
	\$680 / VPC / month	\$20.4K / VPC	\$850 / VPC / month
Price Metric	VPC (<i>virtual processor core</i>)		
Entitlements	1:3 OCP		
OpenShift License	Unrestricted Entitlement		

- *Committed Term Licenses available for net new deals only*
- *Different countries have different prices due to different taxes and discount practices*

SML Sizing Updates – Moving to new Utility for v20.0.2

SML Sizing for CP4Automation v20.0.1

Cloud Pak Capability	Choose size & Deployment Environment	Measurement of work	Volume of Work possible	Cloud Pak Licenses						
				Estimated Container vCPU - prod	Estimated Container vCPU for each Non-Prod	Estimated Traditional Cores Prod	Estimated Traditional Cores for each Non-Prod	Estimated Prod	Estimated Non-Prod	Estimated Combined
Workflow - BAW	M - Traditional	Daily Cases / Processes	2500 or 3000	N/A	N/A	6	6	30	15	45
	M - OpenShift	Rules per day	2 Million	9	6			45	15	60
Content (CPE, CSS licensed)	None	Documents per Day /Concurrent users								
Add Records Management	No			N/A	N/A					
ICC email/Sharepoint/files	None	Email / Files Per Day		N/A	N/A					
ICC for SAP	None	Files Per Day		N/A	N/A					
Capture										
Datacap	None	Pages Per Day		N/A	N/A					
Content Analyzer	None	Pages Per Day			N/A	N/A				
BAI (using HDFS)	L - OpenShift	Events per Second	400	15	No Charge	No Charge	15	No Charge	15	
		Event Sources**	3							
App Builder (Engine licensed)	None	App executions per day			No Charge	N/A	N/A		No Charge	
Digital Worker	L - OpenShift	+ current Dig. Workers	140	6	No Charge	N/A	N/A	6	No Charge	6
Workstream Services (with CPE)	None	To be clarified			No Charge	N/A	N/A		No Charge	
		Total:		30	6	6	6	96	30	126

SML Sizing for CP4Automation v20.0.2

The requirements are valid.

The SML section is for early License Budgetary Purposes only and does not size full hardware needs. The Custom section enables License sizing for specific client projects.

Cloud Pak for Automation

Requirements Quick Start

Analyze Sizing Requirements Generate Draft Sizing

Capabilities Small/Medium/Large v20.0.2

Cloud Pak Capability	Deployment	Environment	Deployment Size	Work Measurement	Work Volume	Licensed vCPUs/Cores
BAI	OpenShift	Production	Medium	Event Sources / Events per Second	2 / 200	6
Cloud Pak Capability						
Workflow - BAW	Traditional	Production	Medium	Daily Cases / Processes	2500 / 3000	6
Cloud Pak Capability						
Workflow - BAW	Traditional	Non Product...	Medium	Daily Cases / Processes	2500 / 3000	6

<https://cool-sizing.dal1a.cirrus.ibm.com>

Available in Seismic



SML Sizing Step 1 – Create Sizing Project

- 1) Fill in Opportunity Number
Project name and Client name

- 2) Select Cloud Pak for
Automation project

Cloud Sizing Tool 26.0.2-6b6f442 ci

Ritchie, Andr

PROJECT OVERVIEW REQUIREMENTS SIZING

Automation Project 1

Project Overview Create Snapshot

Opportunity Number: 1234

Project Name*: Automation Project 1

Client Name*: Client 1

Client Address:

Client Contact Info:

Client Industry:

Requester IMT/GMT:

Contract Channel:

Lead Country*: United Kingdom

Offering(s):
 MQ Appliance
 DataPower
 API Connect
 App Connect Enterprise
 ODM
 RAV
 Cloud Pak for Automation

Partner Name:

BP Contact Info:

SML Sizing Step 2 – Add capabilities to be sized

The screenshot shows the 'Requirements' tab selected in the navigation bar. A message at the top states: 'The SML section is for early License Budgetary Purposes only and does not size full hardware needs. The Custom section enables License sizing for specific client projects.' To the right, a button labeled 'Cloud Pak for Automation' is visible. Below the message, there are two tabs: 'Requirements' (selected) and 'Quick Start'. The main area features a purple header with a '+' button, a search bar, and buttons for 'Analyze Sizing Requirements' and 'Generate Draft Sizing'. The table below has columns: 'Cloud Pak Capability', 'Deployment', 'Environment', 'Deployment Size', 'Work Measurement', 'Work Volume', and 'Licensed vCPUs/Cores'. Red circles highlight the '+' button, the 'Cloud Pak Capability' column header, the 'Deployment' and 'Environment' column headers, and the 'Generate Draft Sizing' button.

Cloud Pak Capability	Deployment	Environment	Deployment Size	Work Measurement	Work Volume	Licensed vCPUs/Cores
BAI	OpenShift	Production	Medium	Event Sources / Events per Second	2 / 200	6
Cloud Pak Capability	Deployment	Environment	Deployment Size	Work Measurement	Work Volume	Licensed vCPUs/Cores
Workflow - BAW	Traditional	Production	Medium	Daily Cases / Processes	2500 / 3000	6
Cloud Pak Capability	Deployment	Environment	Deployment Size	Work Measurement	Work Volume	Licensed vCPUs/Cores
Workflow - BAW	Traditional	Non Product...	Medium	Daily Cases / Processes	2500 / 3000	6

Press “+” to add new capability

Fill in the Capability, Deployment Type, Environment and SML Deployment size

Once complete select “Generate Sizing”

SML Sizing Step 3 – Review Sizing and List Pricing

1) Ensure regional pricing is entered

2) Review Total sizing

- Licenses vCPU's
- Licenses
- Pricing options

3) View in detail by capability if needed

Sizing						Evaluate	Export	X			
Requirements											
> VPC CTL (D267PLL) VPC Perpetual (D20RULL) VPC Monthly (D20RNLL)						Current Price for 1 License					
680 21400 850						Please enter list price values in your local currency.					
Sizing Totals											
Total vCPUs/Cores	Total Licenses	Total Solution Perpetual List Price	Total Solution Committed Term License Price	Total Solution Monthly List Price							
18	51	1091400	34680	43350							
Pricing Details											
Estimated OpenShift License Requirements						Total vCPUs/Cores	Total Licenses	Total Solution Perpetual List Price			
						6	6	128400			
						4080	5100				
Estimated Kubernetes License Requirement Details											
Cloud Pak Capability	Kubernetes vCPU/VPC Production	Kubernetes vCPU/VPC Non-Production	Estimated CP4Auto Licenses Production	Estimated CP4Auto Licenses Non-Production							
BAI	6	0	6	0							
Estimated Traditional License Requirements											
Total vCPUs/Cores						Total Solution Perpetual List Price	Total Solution Committed Term License Price	Total Solution Monthly List Price			
12						963000	39600	38250			
Estimated Traditional License Requirement Details											
Cloud Pak Capability	Traditional vCPU/Cores Production	Traditional vCPU/Cores Non-Production	Estimated CP4Auto Licenses Production	Estimated CP4Auto Licenses Non-Production							
Workflow - BAW	6	6	30	15							

SML Sizing – Summary

- 1) Recommend IBM Sellers start using new tool for Cloud Pak for Automation v20.0.2
 - We are still working on approvals for partners to use
- 2) Additional Benefits
 - Consistent Sizing in COOL, in similar way to ODM, Workflow and other capabilities
 - Provides a written report at end of sizing with disclaimers which makes it easier to share with clients
 - Will have latest updates for ADS, BAW containers by end of June 2020
 - Also has a Custom Sizing utility
- 3) Older spreadsheet utility
 - SML utility will be kept on Siesmic for a short period after June
 - Tech Sales Openshift Detailed Sizing will be maintained with this utility

Create a Cloud Pak for Automation Value Proposal

The Ask: Download the Cloud Pak for Automation Proposal template to add/remove the software and services you need in Section 5.

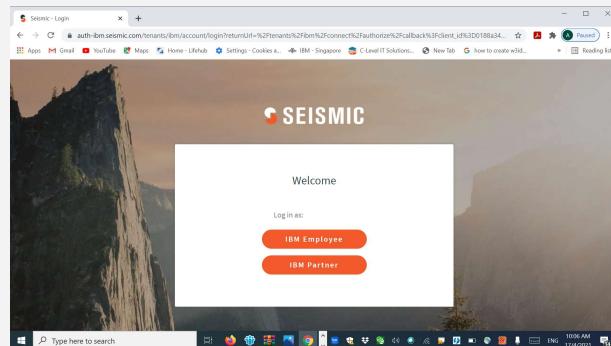
Save the proposal on your laptop for future reference.

Start Here (Cloud Pak for Automation proposal template):

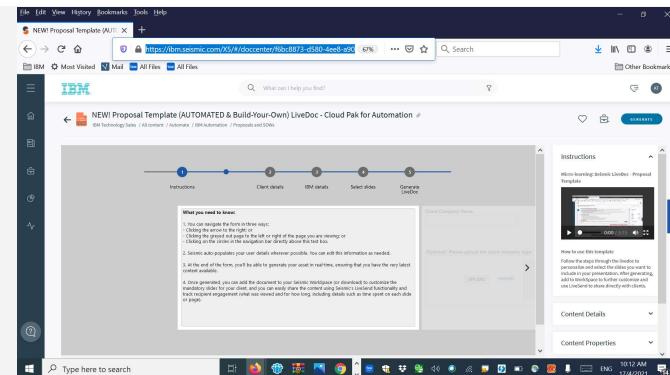
<https://ibm.seismic.com/X5/#/doccenter/f6bc8873-d580-4ee8-a903-c4e0d3a7eee9/doc/%252Fdd304bc116-eee8-2137-7b7c-812f1ae22c65%252Fdd81daa51c-abe5-f90d-e262-0263403ba44c%252Fd0TRiYmU4NTQtNWY4NC03Y2QyLWZjYWUtOGIxYmFmZjkyZThk%252CPT0%253D%252CUHJvcG9zYWxzIGFuZCBTT1dz%252Flf62eecc3e-3d24-41d6-a0e5-2db7b57739d8//?mode=view&searchId=18520e5b-c5a6-41bd-8d24-3efeb4bd5b6e>

Start Here (IBM RPA with WDG proposal template):

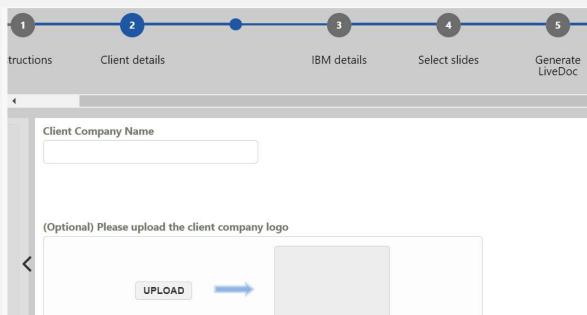
<https://ibm.seismic.com/X5/#/doccenter/861ea1fd-99e0-44d7-9135-85412e5c28d1/doc/%252Fdd3359e5f7-a856-a91b-7688-41024b2ac637%252Fd0NTY4NmVhOWItY2RkNS04ZWY3LTZkNzItZTQwZjczMWUyMjk1%252CPT0%253D%252CSUJNIEF1dG9tYXRpb24%253D%252Fd0Others%252Flf27495860-97b1-47ef-8dda-1198e0779c87//?mode=view&searchId=18520e5b-c5a6-41bd-8d24-3efeb4bd5b6e>



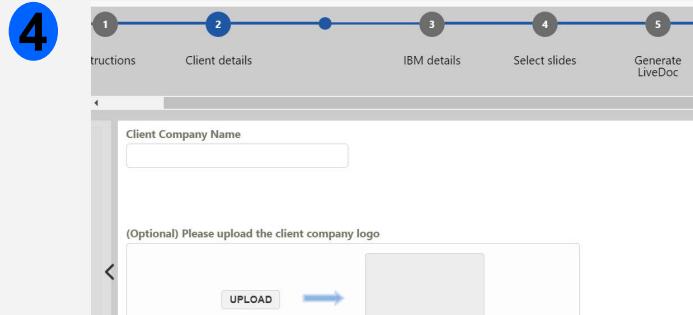
1



2



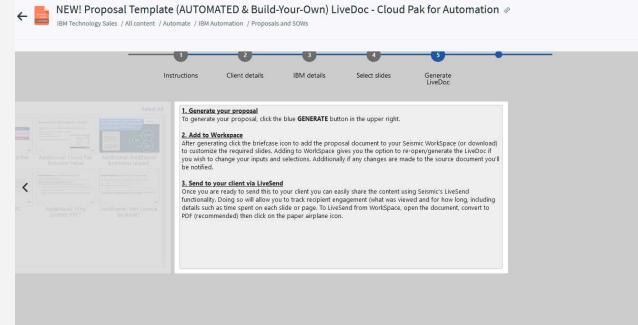
3



4



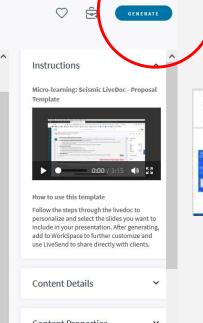
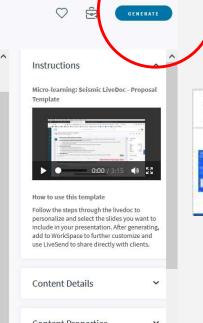
6



1. Generate your proposal
To generate your proposal, click the blue GENERATE button in the upper right.

2. Add to Workspace
After generating the proposal, click the blue briefcase icon to add the proposal document to your Seismic Workspace (or download) to customize the required slides. Adding to Workspace gives you the option to re-optimize the LiveDoc if you need to change your inputs and selections. Additionally if any changes are made to the source document you'll be notified.

3. Send to your client via LiveSend
Once you are ready to send this to your client you can easily share the content using Seismic's LiveSend functionality. Click the blue envelope icon to send the proposal document (and any requirement and its notes being included) as a PDF (recommended) then click on the paper airplane icon.



7

File Home Insert Draw Design Transitions Animations Slide Show Review View Help PDF Architect 6 Creator

IBM Cloud Pak for Automation Proposal for .pptx

1

IBM Cloud Pak for Automation
Proposal for

Ann Thye Kuan
IBM Automation Exec
April 17, 2021

2

Agenda

- 1 IBM Cloud Pak for Automation Overview & Licensing Details
- 2 Review of Requirements
- 3 Discuss Value of IBM Cloud Pak for Automation for
- 4 Overview of Proposal for
- 5 Timeline and Next Steps for
- 6 Client References

3

The Team

Your IBM Team can assist you in the following ways:

4

Cloud Pak for Automation

A faster, more secure way to move your core business applications to any cloud through enterprise-ready containerized software solutions

IBM containerized software

Complete yet simple

IBM certified

Run anywhere

5

Key Terms & Definitions: Licensing Overview

Term	Description
Virtual Machine (VM)	The Cloud Pak for Automation provides the virtual machine environment for the server or application instance to run on. It is used to host the virtual instances or virtual machines assigned to a virtual instance.
Physical Server	Any standard physical server, hardware that has been designed to support the needs of the Cloud Pak for Automation. It is used to host the virtual instances or virtual machines assigned to a virtual instance.
Container	The smallest unit of delivery, the number of Cloud Pak for Automation nodes available for use by one or more Cloud Pak for Automation projects. A physical server requires multiple containers to support multiple Cloud Pak for Automation projects.
User License	When a user is granted access to a Cloud Pak for Automation project, they are assigned a user license. This license allows them to use the Cloud Pak for Automation project in a manner that is specified by the user license terms.
“Mobile edition”	A version of the Cloud Pak for Automation application that is designed to be used on mobile devices. It is a separate component of Cloud Pak for Automation.

6

Review of Requirements:

Client Request/Requirement	IBM Response
Approval	IBM will provide flexible licensing
Term agreement	Unlimited Term License
Licensing	IBM
Platform	ATM Home

7

IBM Value Proposition

IBM is the right partner for: **(INSERT MAIN VALUE TO CLIENT HERE).**

IBM lets you rapidly scale up or down to meet fluctuating customer demand, rapidly create new products and services to gain competitive advantage, and increase the productivity of remote and onsite workers. It is a complete and flexible set of integrated automation software that can be deployed wherever you need it, on any cloud.

8

Overview of Proposal: Financial

Quantity, license type, term commitment:

- License Quantity:
- License Type:
- Term:

Period 1: **(Insert USD)**
Period 2: **(Provide any approved NTE pricing)**

9

Overview of Proposal: Project Delivery

(Expert Lab, GBS, Partner):

How We Will Deliver & Timeline:

Risk Mitigation:

10

IBM & : Next Steps

Approval Process:

- Next Steps:
- Owners:

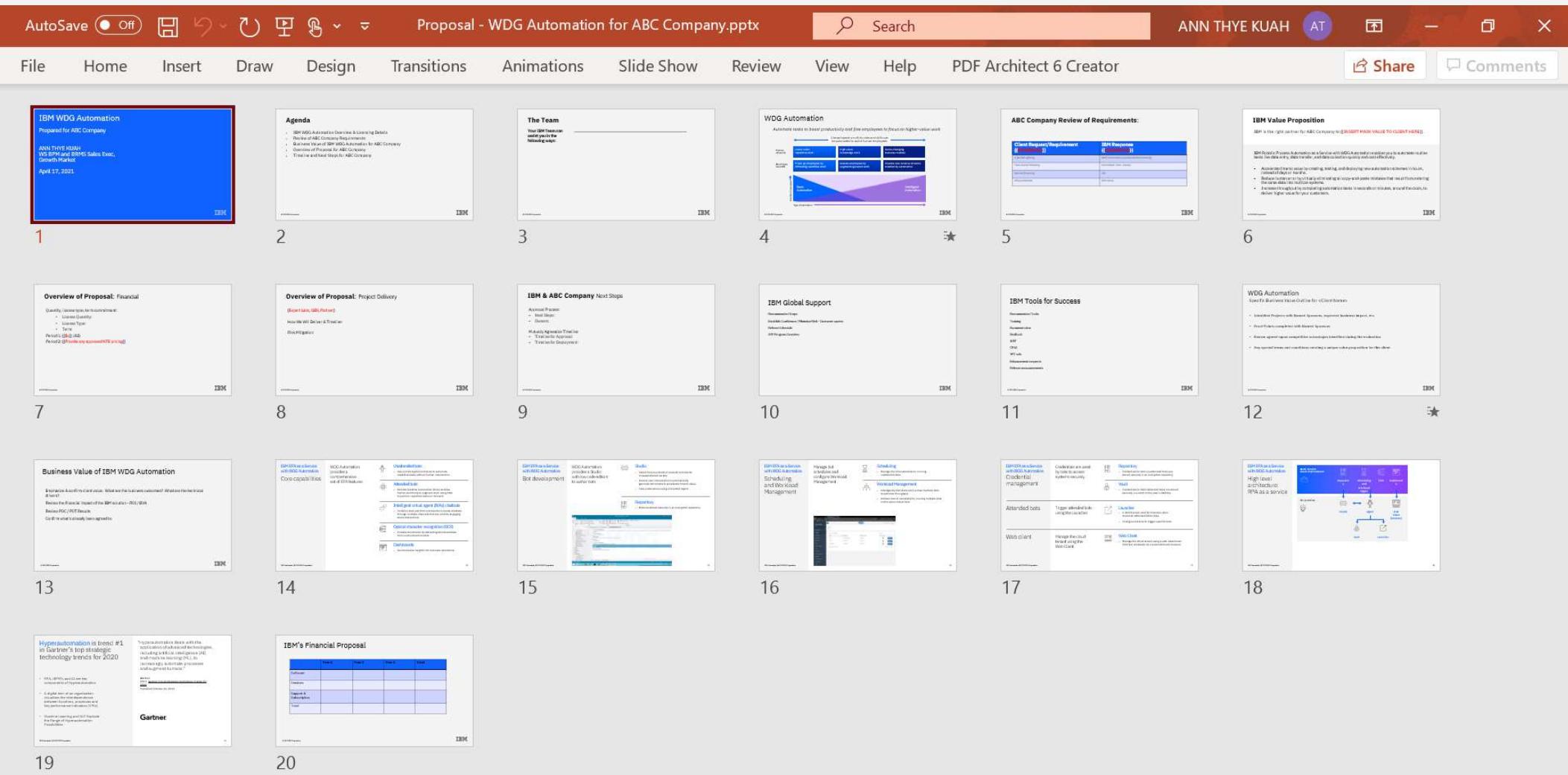
Mutually Agreeable Timeline:

- Timeline for Approval:
- Timeline for Deployment:

11

IBM Automation has helped thousands of organizations transform their business operations

Client References: <http://ibm.biz/referralspage>
Official Global Reference Database - Client Success Central: http://ibm.biz/bm_osc
Additional References: [Customize to Client](#)



File Edit View History Bookmarks Tools Help

*DBA Sizing & Licensing Home X Server Not Found IBM Registration form X +

https://ibm.seismic.com/X5/#/doccenter/f6bc8873-d580-4ee8-a903-c4e0d3a7eee9/doc/%252Fdd304bc116-eee8-2137-7b7c-812f1ae22c65%252Fdd81daa51c-abe5-f90d-e262-0263403ba44c%252Fd1OTRlYmU4NTQtNWY4NC03Y2QyLWZjYWUiOGIxYmFmZjkyZThk%252CPT0%253D%252CUm91bmR1cCBvc1BzdW1tYXJ5%252Flf2fdb3328-f960-4789-a612-3fceab85c249l/?mode=view&searchId=20e3550b-de85-4ba3-b9b2-7bd6d09184be&anchorId=7bb780ca-763c-497e-825e-66672dfd80fa

IBM Most Visited Mail All Files All Files Other Bookmarks

IBM What can I help you find? AT

*DBA Sizing & Licensing Home Page IBM Technology Sales / All content / Automate / IBM Automation / Roundup or summary

Links to COOL Tool and to CP4Auto COOL Sizing Video Tutorial
Accessible to IBMers (Internal)

COOL TOOL CP4Auto on Cool Video Tutorial

Important DBA Sizing and Licensing Links Located in BOX
Accessible to IBMers (Internal)

CP4Auto Sizing Info BAW Sizing Info ECM Sizing Info Content & Capture Sizing Info ODM Sizing Info

Key DBA Sizing Documents in Seismic

Type	Name
Icon	CP4BA - v21.0.1 Tech Sales Sizing Calculator
Icon	CP4BA - v21.0.1 Managing License Entitlements

FEEDBACK

Typical Sizing Steps

- For Business Partners:
 - CP4Automation - Platform Overview Golden Topology PDF
 - https://ibm.seismic.com/Link/Content/DCO_k_eortUOeeJfLTiG8g
 - 032021 CP4 Business Automation Enablement V21.0.1 Tech Sales Update
 - <https://ibm.seismic.com/Link/Content/DC4za6b3Y-RUWaJ63YMhYcUw>
- Check T shirt sizing
 - CP4BA - Typical Configurations (Tshirt Sizing)
 - <https://ibm.seismic.com/Link/Content/DCcEBSkVmRxEqFbbw6xO5uyQ>
- For IBMers ONLY:
 - DBA Sizing & Licensing Home Page
 - Links to COOL sizing & BOX folder on Product Sizing Info
 - <https://ibm.seismic.com/Link/Content/DC4hkvPvIY3UupDWIrqtJzrA>
- For Openshift ONLY:
 - CP4BA - v21.0.1 Tech Sales Sizing Calculator
 - For IBM Internal Use only
 - <https://ibm.seismic.com/Link/Content/DC6YDF34ZNj0WRcpM-01OnnQ>
- For CP4BA license deployment tracking:
 - CP4BA - v21.0.1 Managing License Entitlements
 - https://ibm.seismic.com/Link/Content/DCjBFnu3y_uW0iEXihbc6sVVw
- Look up CP4BA license Info for conversion ratio
 - http://www14.software.ibm.com/cgi-bin/weblap/lap.pl?li_formnum=L-ASAY-BUECHA
- Look up Offering Info for Product Packaging Info
 - https://www-01.ibm.com/common/ssi/SearchResult.wss?request_locale=en&MPPEFFTR=CONTENTS&MPPEFSCH=cloud%20pak%20for%20automation&MPPEFSRT=2&ctry=ASP&ctype=ANCA:Software&lang=en

In summary

How to Get Started

How we can help

1. Deploy a “quick win” project in 6 weeks
2. Do forensic cost-cutting analysis of your business operations
3. Accelerate your move to the cloud
4. Standardize on a modular, integrated automation platform
5. Take advantage of available financing, if needed



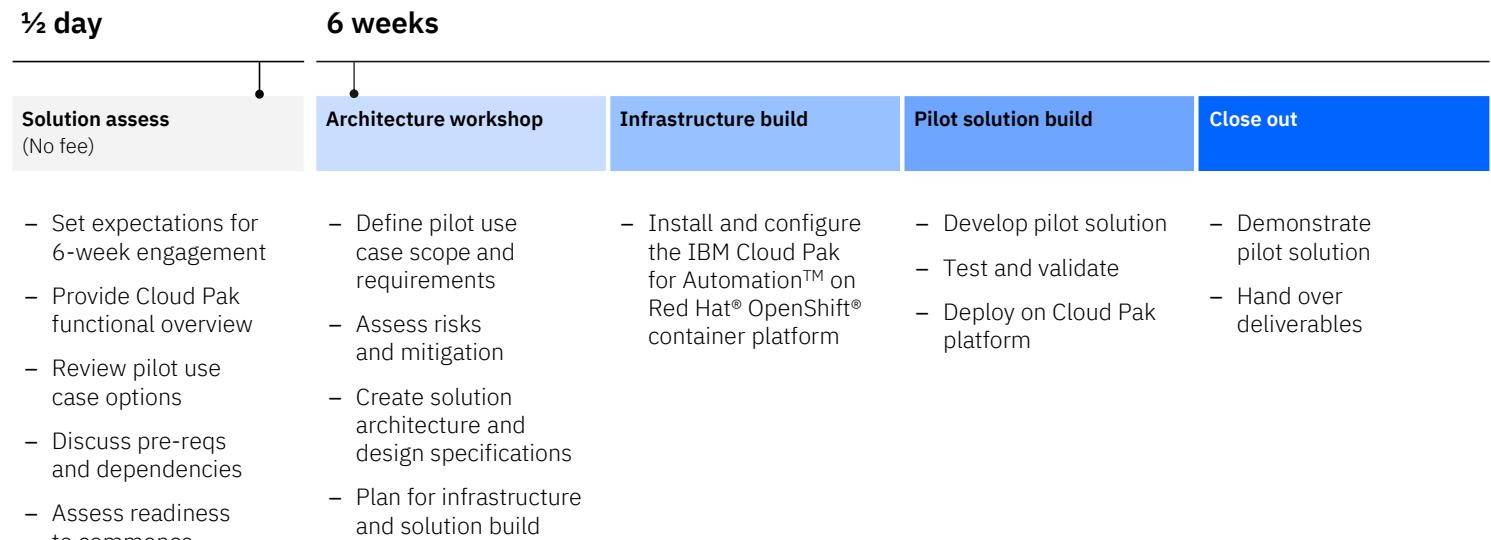
Deploy a “quick win” project in 6 weeks

Objective: Execute a focused and fast paced 6-week engagement with Expert Labs

9 Entry points to get started:

Handle spikes in demand with straight-through-processing	Support customer self service with mobile capture	Enable remote collaboration with cloud-based process and decision modeling
Enable scalable customer service with intelligent automation	Quickly create new automation solutions with low-code applications	Enable secure, compliant remote content access with content services
Help employees spend time on higher value work with robotic process automation	Adapt business policies to changing conditions with decision services	Automate internal processes with lightweight workflow applications

Our approach:



Do forensic cost-cutting analysis of your business operations

Business Automation Forensic Evaluation

A virtual workshop to identify operational areas for cost reduction.

During the workshop we will:

- Identify **unused assets** and opportunities for technology consolidation
 - Pinpoint underutilized infrastructure
 - Uncover duplicate applications and services
- Apply **process mining** to understand your workloads and reassign resources to where they provide the highest return
- Develop an **action plan** to drive value quickly



Accelerate your move to the cloud



Get automation applications up and running quickly

- No need to build out IT infrastructure
- Host software in our data centers or use containers to deploy on any cloud
- Rapidly prototype new automation applications



Spend less upfront and decrease total cost of ownership

- Lower data center costs and resources (e.g., space, personnel, power, maintenance, backup, security)
- Convert capital expenditures to operating expenditures
- Offload software management (e.g., security patches, software updates, compliance management)



Scale up and down as needed

- Easily add capacity to meet spikes in demand
- Use flexible pricing models to only pay for what you need
- Reallocate licenses to other automation platform capabilities with no new contracts

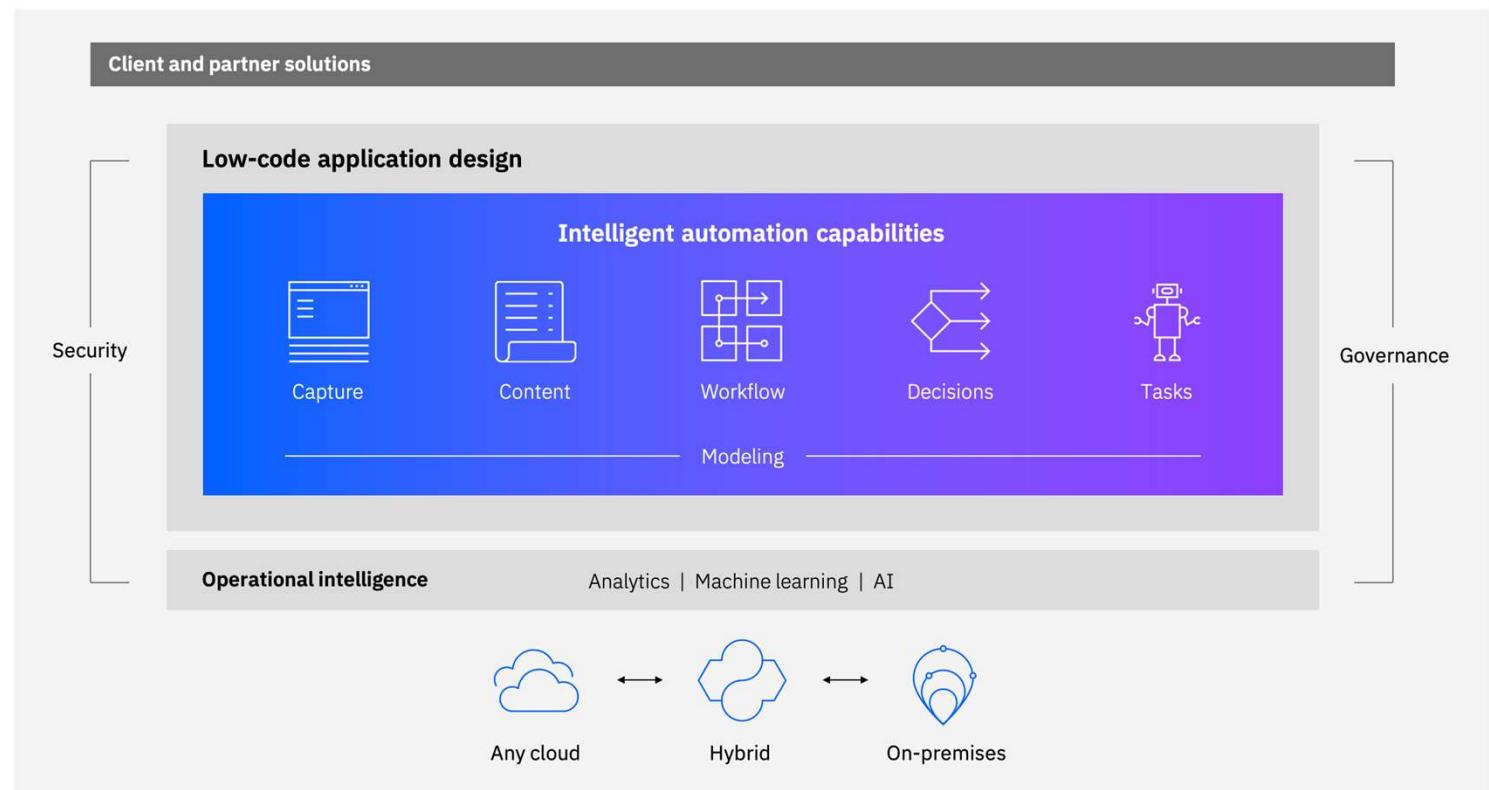


We can host your applications in **over 60 high-bandwidth, low-latency data centers** in 19 countries on six continents

Standardize on a modular, integrated automation platform

Start small and scale—only use what you need, when you need it.

IBM Cloud Pak for Automation



Cloud Pak for Automation - Method to request Trial entitlements

Step1: Client fills out a URX Form to request trial API key (60 day)

<https://www.ibm.com/account/reg/us-en/signup?formid=urx-44505>

The screenshot shows a web form for requesting a trial API key. The left side displays a summary of the trial offer, while the right side contains account information fields and a 'Next' button.

IBM Cloud Pak for Automation 60-day Trial

We're excited that you want to learn more about our platform, IBM Cloud Pak for Automation.

All we need are a few details about yourself and your specific topic(s) of interest, and we will provide you with your Trial API Entitlement subscription key.

Already have an IBM account? [Log in](#)

Sign-up now for your 60-day trial

1. Account information

E-mail (i)
Your email address will become your IBMid, which you'll use to log into IBM.com.

First name Last name

Password ()

- 8 characters minimum
- One uppercase character
- One lowercase character
- One number

Country or region of residence State or province

[Next](#)

Cloud Pak for Automation - Method to request Trial entitlements

Step2: Client uses the API Key to install and deploy Cloud Pak for Automation

<https://myibm.ibm.com/products-services/containerlibrary>

The screenshot shows the IBM Container software library page. At the top left is the IBM logo and a 'My IBM' link. On the left, there's a sidebar with a cloud icon, 'Container software library' text, 'Get entitlement key' (which is highlighted with a blue border), and 'View library'. The main content area has a heading 'Access your container software' and a paragraph about entitlement keys. Below that is a section titled 'Entitlement key' with the text 'Issued Date: February 18, 2020'. A large text box contains a long entitlement key: eyJhbGciOiJIUzI1NiJ9eyJpc3MiOiJJQk0gTWFya2V0cGxhY2UiLCJpYXQiOjE1ODIwNzMyNDcsImp0aSI6ImM0MmEzYTZjOWMzYTQ2ZWU5ODY1NDBmNDEzYzdmNzUyIn0.aJ-9S7QMAkWYagZfSJutEPDYB6lyNlxdrjR65y5_J2k. At the bottom right of this box are 'Copy key' and 'Get new key' buttons.

Cloud Pak for Automation - Method to request Trial entitlements

Step2: Client uses the API Key to install and deploy Cloud Pak for Automation

<https://myibm.ibm.com/products-services/containerlibrary>

The screenshot shows the IBM Container software library page. At the top left is the IBM logo and a 'My IBM' link. On the left, there's a section titled 'Container software library' with a cloud icon, 'Get entitlement key' (which is highlighted with a blue border), and 'View library'. To the right, under 'Access your container software', it says 'Below you'll find your entitlement key — Use it to verify and gain access to your container software. Check out the [container software library](#) to see details and a full list of the container software you own.' A large box contains the entitlement key: eyJhbGciOiJIUzI1NiJ9eyJpc3MiOiJJQk0gTWFya2V0cGxhY2UiLCJpYXQiOjE1ODIwNzMyNDcsImp0aSI6ImM0MmEzYTZjOWMzYTQ2ZWU5ODY1NDBmNDEzYzdmNzUyIn0.aJ-9S7QMAkWYagZfSJutEPDYB6lyNlxdrjR65y5_J2k. Below this box are 'Copy key' and 'Get new key' buttons.

Hyperautomation in action

Partner Support Material

File Edit View History Bookmarks Tools Help

Seismic DocCenter Seismic DocCenter Seismic DocCenter +

IBM Search Mail

IBM What can I help you find? ? AT

Intelligent Automation with Cloud Pak for Automation Sales Play - Cloud Integration

DocCenter / Cloud & Cognitive Software / Browse Cloud & Cognitive Software / Cloud Integration / Digital Business Automation / Sales Plays

Intelligent Automation with Cloud Pak for Automation

Sales Play

This screenshot shows a web browser window with three tabs open, all titled "Seismic DocCenter". The active tab displays the URL [. The page content is a sales play titled "Intelligent Automation with Cloud Pak for Automation" under the "Cloud Integration" category. The sidebar on the left contains various icons for navigation.](https://ibm.seismic.com/X5/DocCenter.aspx?FolderId=5cbccb#/doccenter/6978143f-3408-4831-8558-9527b1279d8a/doc/%252Fdd86dcc126-ab33-495f-8000-fddd47641ea0%252Fdd419b9446-1e10-4e82-9037-f7d199b80b66%252Fdf4b7d3b21-207b-4009-8e9c-700edbe73dfc%252Fdf2ed41e50-ebec-4a0b-8c98-7b46d94ede30%252Flfecbd90df-8160-44c3-bac2-9fd39542f788//?mode=view&anchorId=b6933573-ca2a-415d-8e42-a38b52bd81ea)

<https://ibm.seismic.com/X5/DocCenter.aspx?FolderId=5cbccb#/doccenter/6978143f-3408-4831-8558-9527b1279d8a/doc/%252Fdd86dcc126-ab33-495f-8000-fddd47641ea0%252Fdd419b9446-1e10-4e82-9037-f7d199b80b66%252Fdf4b7d3b21-207b-4009-8e9c-700edbe73dfc%252Fdf2ed41e50-ebec-4a0b-8c98-7b46d94ede30%252Flfecbd90df-8160-44c3-bac2-9fd39542f788//?mode=view&anchorId=b6933573-ca2a-415d-8e42-a38b52bd81ea>

Automation Platform for Digital Business

- [How a Platform Can Help You Automate At Speed and Scale \[video\]](#)
- [How To Best Collect and Understand Your Operational Data \[video\]](#)
- [How to Deploy an Automation Platform on Private or Public Cloud \[video\]](#)
- [Digital Business Automation on Cloud \[draft Box video\]](#)

Overview

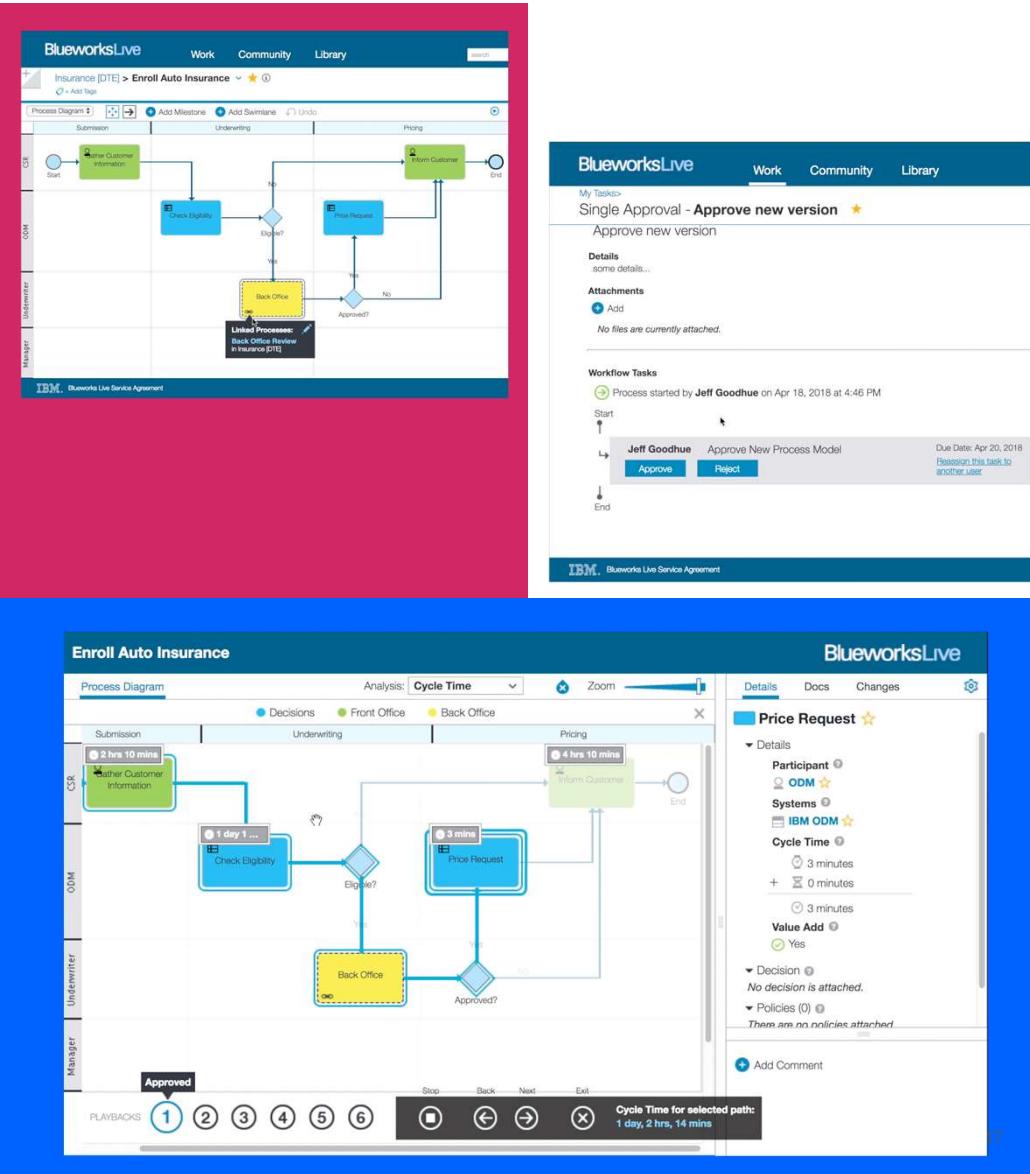
The screenshot displays the IBM Business Automation Insights interface, which includes:

- A top navigation bar with tabs for "Capture", "Automated Data Entry", and "Manual Data Entry".
- An "IBM Flows with AI" section featuring a process flow diagram titled "IBM Capture". The flow starts at "Start", goes to "Capture Invoice Data", then "Enter Invoice Data", and finally a decision diamond "Missing Data?". If "Yes", it branches to "Enter Missing Invoice Data" and "Review Invoice", then loops back to "Missing Data?". If "No", it proceeds directly to an end state.
- A "Service Log" section showing job progress and status for "IBM FileNet Content Manager Provision Job" (Success) and "IBM Operational Decision Manager Provision Job" (Running).
- A "Products Log" section displaying a log of events, including:
 - Creating myvalues.yaml from jobs.yaml
 - Modifying Helm chart to include metering
 - Helm chart has been modified
 - 2018-10-24-22:08:49: Initialize CLI Configuration
 - 2018-10-24-22:09:12: Finished Initialize CLI Configuration
 - 2018-10-24-22:09:12: Deploy Helm Release for COM
 - 2018-10-24-22:09:18: Finished Deploy Helm Release for COM
 - 2018-10-24-22:09:20: Get Service IP and Ports
 - 2018-10-24-22:09:30: Finished Get Service IP and Ports
 - 2018-10-24-22:09:32: Check Deployment
 - 2018-10-24-22:10:02: Checking Decision Server Console availability
 - 2018-10-24-22:10:03: Finished Checking Decision Server Console availability
 - 2018-10-24-22:10:04: Checking Decision Center availability
- A central dashboard area titled "IBM Business Automation Insights" showing metrics like "5 not completed user tasks", "180 started user tasks", and "134 completed user tasks".
- Four detailed charts:
 - "User tasks completed by team" bar chart for May 4th 2018, 07:34:22.633, showing data for GeneralManagers (5), Human Resources (4), and All Users (9).
 - "User tasks started by team" bar chart for May 4th 2018, 07:34:22.633, showing data for GeneralManagers (5), All Users (4), and Human Resources (1).
 - "User tasks failed by team" bar chart for May 4th 2018, 07:34:22.633, showing data for GeneralManagers (2), Human Resources (1), and All Users (1).
 - "User tasks currently not completed by performer" pie chart showing distribution across performers: Chris (purple), admin (blue), Upma (green), Review (red), Subrin (orange), Dunnin (yellow), and Standin (light blue).

Modeling

- [Efficiently Model a Business Process](#) [video]
- [Enhance and Playback a Business Process](#) [video]
- [Manage and Govern Business Processes](#) [video]
- [Tour Blueworks Live](#) [clickthrough]

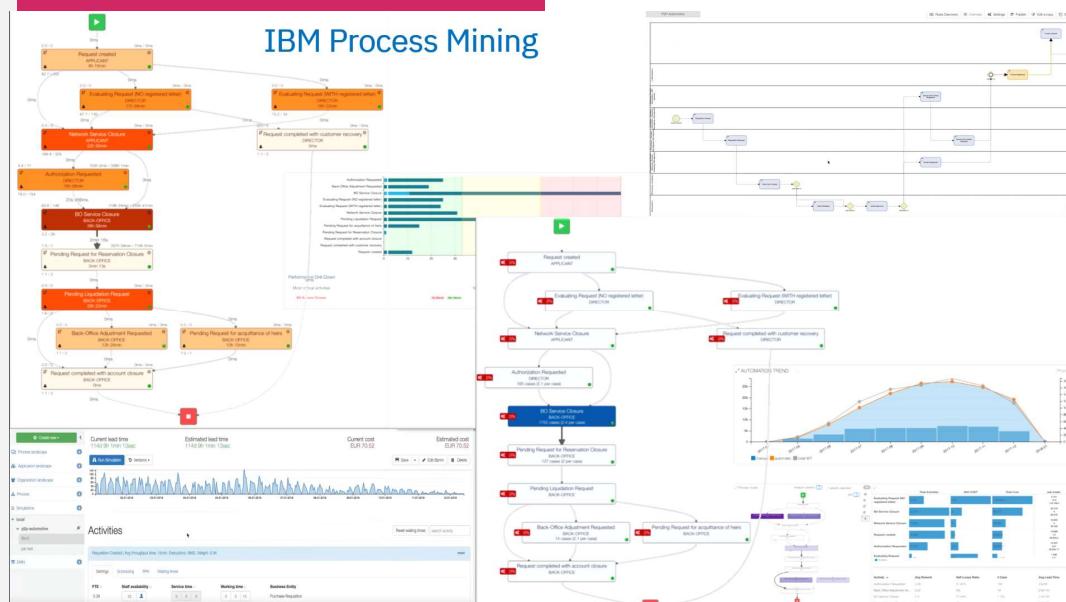
Overview



Process Mining

- [Process Mining Intro](#) [video]
- [Process Mining Primer](#) [video]
- [Procure to Pay](#) [video]
- [Order to Delivery](#) [video]

Analysis of real business processes



Overview

ation 2018 / Presentation Title / June 5-13, 2018 / © 2018 IBM Corporation

Data Capture

Content Analyzer

- [Easily Capture and Understand Your Documents Using AI](#) [video]
- [Tour Content Analyzer](#) [clickthrough]

Datacap

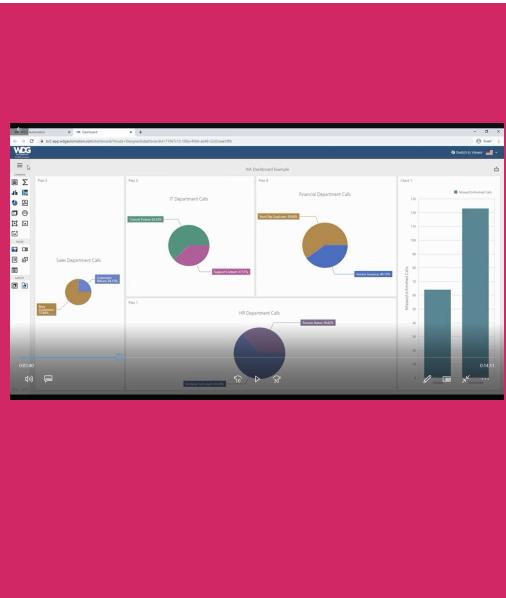
- [Use Cognitive Data Capture with Robotic Process Automation \(RPA\)](#) [video]
- [Use the Datacap MetaBot with Robotic Process Automation \(RPA\)](#) [video]
- [Use Datacap Mobile for Account Opening Documents](#) [video]
- [Use Cognitive Data Capture in Unstructured Documents](#) [video]
- [Tour Datacap](#) [clickthrough]

The screenshot displays the IBM Business Automation Content Analyzer. It features a central 'Ontology' diagram showing relationships between various document types and their components. On the left, there's a sidebar with navigation options like 'Add Document Class', 'Ontology', 'Search', and 'Logout'. The 'JSON Viewer' pane on the right shows a detailed view of an 'Accident Report' document, including fields for 'Client', 'Address', 'Adjutor', 'Claim', 'Date', 'Report Type', and a list of 'Value' entries. The bottom right corner shows a 'Batch Structure' tree, listing documents by ID, type, and status.

This screenshot shows the Accounts Payable module within the IBM Business Automation system. It displays an invoice from 'Yellow Insurance Agency' with specific line items and totals. The 'Field Details' section provides a breakdown of the invoice data. The 'Batch Structure' pane on the right shows a hierarchical list of document batches and their individual entries, each with a status indicator.

Robotic Process Automation

- [IBM RPA](#) [video]
- [IBM RPA OCR](#) [video]
- [Interactive Voice Response \(IVA\)](#) [video]
- [RPA Dashboard](#) [video]
- [Bot Converter](#) [clickthrough]



This screenshot shows the 'Bot Converter' interface. On the left, a script editor lists numbered steps: 17 (Connect to Chatbot or IVR), 18 (Bot Says), 19 (Bot Says), 20 (Run Subroutine), and 21 (Disconnect Chatbot or IVR). Step 21 has a tooltip 'Disconnect'. On the right, a 'Chat' window shows a conversation between 'MDS Admin' and 'MDS Automation'. The admin asks for a ZIP code, and the automation responds with 'The city and state for ZIP code "90210" is "BEVERLY HILLS CA".' A message input field at the bottom is labeled 'Type your message...'.



Content

FileNet

- [Easily Access and View Content](#) [video]
- [Collaborate on Content in a Teamspace](#) [video]
- [Secure Content and Protect Data](#) [video]
- [Securely Share Content with External Users](#) [video]
- [Tour FileNet](#) [clickthrough]

Content Manager On Demand

- [Efficient Bulk PDF Archiving](#) [video]
- [Efficient Bulk XML Archiving](#) [video]
- [How to Gather Archived Data with RPA](#) [video]

[Tour CMOD](#) [clickthrough]

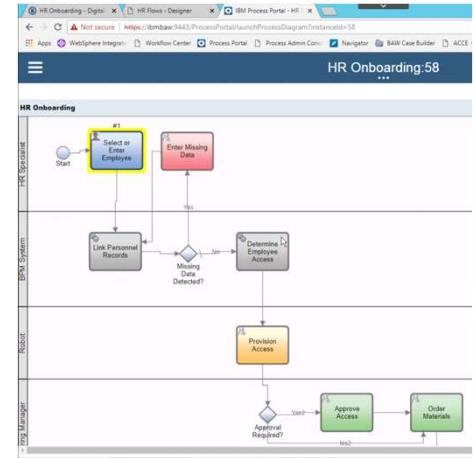
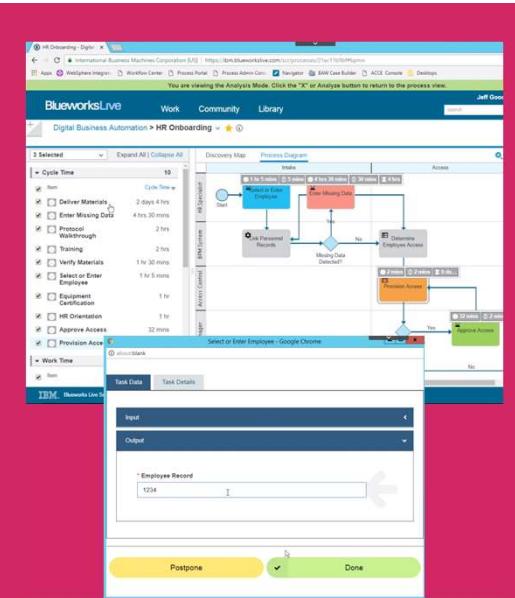
Overview

The image displays three separate windows illustrating various content management and collaboration features:

- Word Online:** Shows a document titled "Home Loan Contest Poster" with a red house icon. The text reads: "By applying for a home improvement loan between now and May 1, 2018, you will be entered to win a home design consultation from Design Consultants, Inc. worth up to \$15,000." It also mentions "Sponsored by Focus Finance and Design Consultants, Inc." and "Focus Finance". A yellow banner at the top right says "See Bryan is editing this document".
- IBM Workday:** A screenshot of a service request form titled "Example Company SOW ABCD-123456 v0.0.pdf". It includes sections for "Work Site", "Service Request Description", "Estimated Number of Hours", "Rate per Hour", and "Total". It notes that professional services charges are \$311,412 and excludes travel and living expenses.
- ECM (Content Manager On Demand):** Shows a file browser interface for "Photos". The left sidebar lists categories like ECM, Correspondence, Customer_Contracts, Departments, Focus Insurance, Industry, Labs, NMO Workflows, PoliciesAndProcedures, Products, QuickApp, RFP, Saved Searches, Sync Folder, and Travel Expenses. The main pane shows a list of images with details: Name, Size, Modified By, and Modified On. One file, "amsterdam.png", is selected. The right pane shows "Properties" for the selected file, including Class: Photos, Document Title: amsterdam.png, Country: Netherlands, and Description: ?. It also shows "System Properties".

Workflow

- [Automate End-to-End Workflows](#) [video]
- [Get Started Quickly with Case Management Solutions](#) [video]
- [Low-Code Process Modeling and Execution](#) [video]
- [Automate Faster with Straight Through Processing](#) [video]
- [Tour Business Automation Workflow](#) [clickthrough]

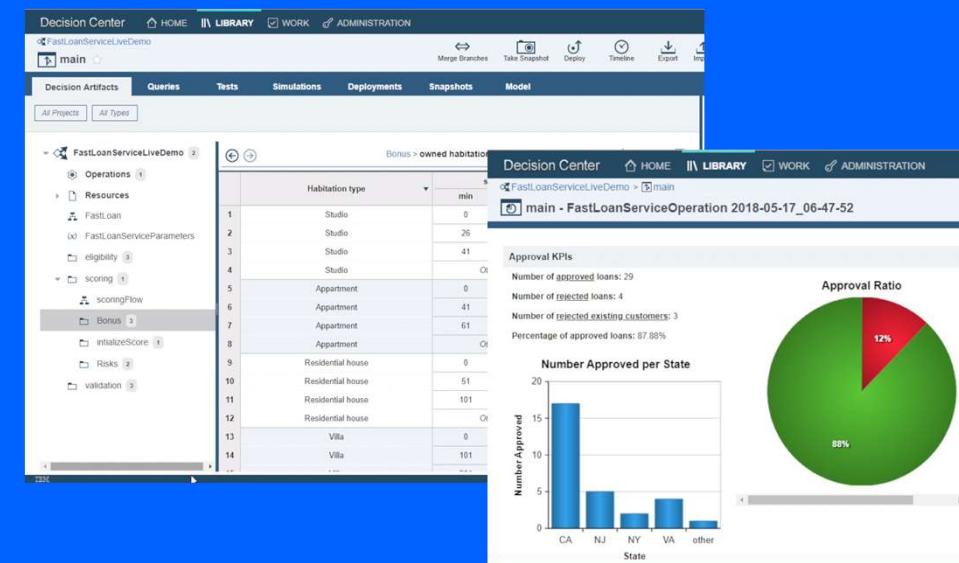
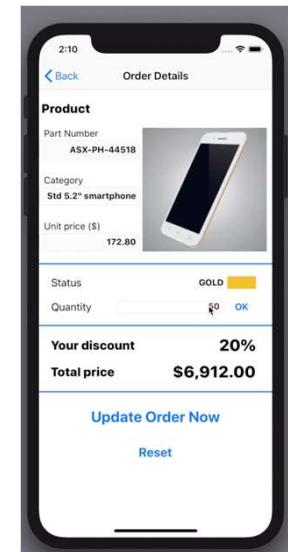
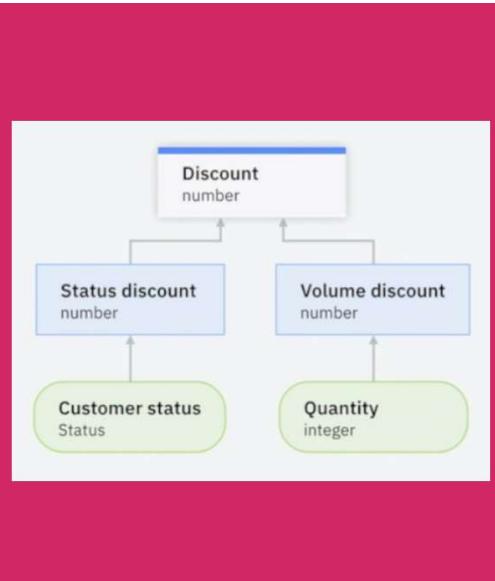


Title	Case State	Modified By	Modified On
Caryn Gant	Complete		2/19/2018, 10:55 AM
Caryn Gant	Working		2/19/2018, 03:50 AM

Overview

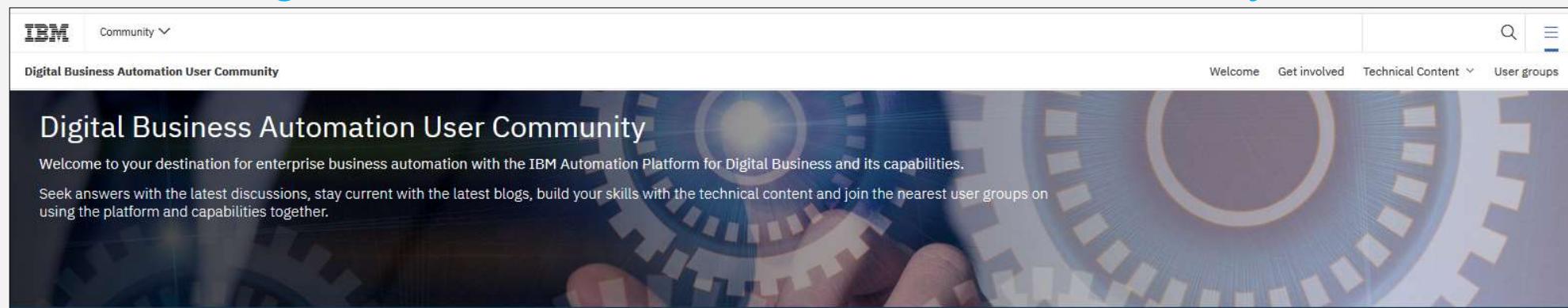
Decisions

- [Automate Decisions with Business Rules](#) [video]
- [Get Started Quickly with Decision Automation](#) [video]
- [Decision Automation Made Simple](#) [video]
- [Tour Operational Decision Manager](#) [clickthrough]



Overview

Digital Business Automation User Community



The screenshot shows the homepage of the Digital Business Automation User Community. At the top, there's a navigation bar with the IBM logo, a "Community" dropdown, a search icon, and a menu icon. Below the header, the page title "Digital Business Automation User Community" is displayed. A main banner features a background of interlocking gears in blue and white, with the text "Digital Business Automation User Community" and a welcome message: "Welcome to your destination for enterprise business automation with the IBM Automation Platform for Digital Business and its capabilities. Seek answers with the latest discussions, stay current with the latest blogs, build your skills with the technical content and join the nearest user groups on using the platform and capabilities together." Below the banner, there are links for "News", "Discussions", "Blogs", and "Events". On the right side of the banner, there's a link "Learn about the platform". The main content area is organized into four columns. The first column contains a section titled "Digital Business Automation topic groups" with a sub-section "Automation Platform" which describes the platform's combination of individual automation capabilities and deployment options. The other three columns represent different automation topics: "Workflow (BAW)", "Business Process Mapping (BWL)", "Capture (Datacap)", "Content (FileNet)", "Decisions (ODM)", and "Tasks (RPA)". Each topic has a brief description.

Digital Business Automation topic groups	Workflow (BAW)	Business Process Mapping (BWL)	Capture (Datacap)
Automation Platform The platform combines the individual automation capabilities and has on-premise, SaaS and Multicloud deployment options. The platform also contains new Business Automation	Model, automate, change, monitor, and optimize core business workflows to improve consistency across tasks and processes, increase productivity, and increase straight-through processing with IBM Business Automation Workflow.	With business changing fast, stop searching to understand how to change processes and decisions. Model, document and make future changes easy with IBM Blueworks Live.	Digitize business documents while extracting, storing and understanding important data to help reduce or eliminate manual entry and errors with IBM Datacap and Content Analyzer.
Content (FileNet)	Decisions (ODM)	Tasks (RPA)	
Provide highly secure and compliant management of most types of content, support instant access to content, connect content to digital business applications and help assure governance	Capture, automate and manage business rules to encourage rapid adaptation to change, increase the consistency and auditability of decisions, and detect problem situations in real time with IBM	Record and automate repetitive human tasks to automate mundane work, eliminate copy-and-paste and data entry errors, and free employee time to do higher-value work with Robotic Process	

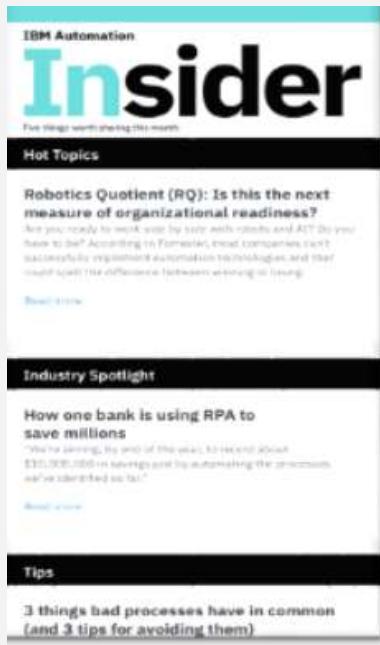
<https://www.ibm.com/community/automation/digital-business-automation/> 54

IBM DBA Automation Newsletter and Automation Learning Hub

A bimonthly newsletter featuring five pieces of strategic content to help subscribers identify real opportunities and get results

A one-stop CX where automation software “shoppers” can learn about the capabilities and offerings that make up our platform. Features **most sought-after asset types** when shopping for solutions: *product overviews, buying guides, demos, tutorials, business value and ROI, and peer reviews*

Bimonthly publication



Always On



A screenshot of the Automation Learning Hub website. The top navigation bar includes links for 'Automation', 'Automation Learning Hub', and social media icons for LinkedIn, YouTube, and Twitter. The main content area features a heading 'Automation Learning Hub' with the subtext 'Get the latest product information, guides, demos and more to help you automate all types of work at scale'. A 'Subscribe to the newsletter' button is visible. Below this, there are two sections: 'What automation capability interests you?' and 'What type of information do you need?'. Each section lists several categories with small arrows pointing to them. A 'Let's talk' button is located in the bottom right corner.

<https://www.ibm.com/automation/learn>

AP Digital Business Automation Partner Training Replay

IBM Robotics Process Automation (RPA) - New Release
<https://ibm.box.com/s/gmujzc6tqy5rukmnws821nvapqhqqj4>

IBM Blueworks Live Webcast – The Key to Opening Large Business Process deals
<https://ibm.box.com/s/muutcfgvzt4e4z9echijlhyuxikr0ebj>

IBM Business Automation Technical Update for IBmers
<https://ibm.box.com/s/cdrsbg1qjucx53alh6d5fq3rbw8k9epd>

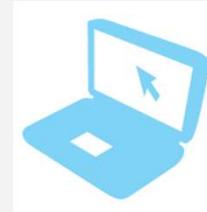
Introduction on DBA on Multicloud
<https://ibm.box.com/s/r0253l6u5kydp15pz27ypoxpa26fq8x4>

IBM Operational Decision Manager 8.10 NEW RELEASE
<https://ibm.box.com/s/rngrvrj41stkvirany8qzo9k25yq0a>

Introduction to Business Automation Content Analyze
<https://ibm.box.com/s/byicwbyzanmywixlycl03coujy7fg25b>

Sales Introduction to Business Automation Insights (BAI)
<https://ibm.box.com/s/g2jwjybj6ldemynaecz4bffwz71l366>

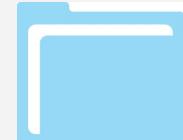
Technical Overview of IBM Business Automation Insights for DBA on Multicloud
<https://ibm.box.com/s/rngrvrj41stkvirany8qzo9k25yq0a>



Skills



Revenue



Client References



Partner & Customer Satisfaction

Consistent criteria used for Channel

Partnerworld

This process provides details for the partners on the overall program. They register via the Skills Gateway.

How to Register for Cloud SPVC courses

<https://ibm.box.com/s/695khv9nyzekaorykqmsjrematz3v9xh>

This is if they don't have or don't know if they have a PartnerWorld user id:

Join PartnerWorld link: <https://www.ibm.com/partnerworld/public/join>

Contact: <https://www-356.ibm.com/partnerworld/wps/servlet/ContentHandler/contactus>

And, as always, I direct partners to our Channel Technical Enablement Guides, also on Skills Gateway (PW user id required). This has great information that our WW technical team have put together for partners. They cover a broadrange of topics for the products, including formal and informal education.

CTEGs: <http://ibm.biz/channel-tech-guides>

Finally, are you on my monthly newsletter? The email title is "New IBM Cloud & Data Platform Learning Services Available for Business Partners - November" and it was sent out last week. This is great information for partners and IBMers to help direct on learning activities. This is a box link

<https://ibm.box.com/s/lds53wkssy0qh70ap18y3dyidt1448j9>) where previous versions are shared. If you or your team would like to "opt-in", please let me know. And please let your partners know about this.

Digital Business Automation	CP4Auto	DL09400G	Getting Started with IBM Decision Composer	Free WBT
		MC09031G	Lab: IBM RPA with Automation Anywhere Lab: Implementing My First Software Bot	Microlearn
		MC09032G	Lab: IBM RPA with Automation Anywhere and BPM Lab: Integrating a Bot with Business Process Manager	Microlearn
	CP4Auto	VW901G	Understanding Business Process Manager	WBT
	CP4Auto	VW902G	Introducing IBM Business Process Manager	WBT
	CP4Auto	VW903G	Getting Started with IBM Operational Decision Manager	WBT
		ZB030G	IBM Blueworks Live Account Administration	SPVC
		ZB031G	Process Discovery and Modeling in IBM Blueworks Live	SPVC
	CP4Auto	ZB036G	Introduction to IBM Operational Decision Manager for Rule Authors	SPVC
	CP4Auto	ZB316G	Installing IBM Cloud Private Native V3.1.0 in a multi-node cluster on Red Hat	SPVC
	CP4Auto	ZB317G	IBM Digital Business Automation for Multicloud, Installation and Administration	SPVC
	CP4Auto	ZB392G	Developing Rule Solutions in IBM Operational Decision Manager V8.7	SPVC
	CP4Auto	ZB393G	Administering IBM Operational Decision Manager V8.7.1	SPVC
	CP4Auto	ZB394G	Developing Solutions with IBM Decision Server Insights V8.7	SPVC
	CP4Auto	ZB395G	Developing Rule Solutions in IBM Operational Decision Manager V8.8	SPVC
	CP4Auto	ZB396G	Managing Decisions in IBM Operational Decision Manager V8.7.1	SPVC
	CP4Auto	ZB398G	Developing Solutions with IBM Decision Server Insights V8.7.1	SPVC
	CP4Auto	ZB399G	Developing Solutions with IBM Decision Server Insights V8.8	SPVC
	CP4Auto	ZB400G BADGE	Developing Rule Solutions in IBM Operational Decision Manager V8.9 <i>IBM Operational Decision Manager Standard V8.9 Developer</i>	SPVC Free Badge
	CP4Auto	ZB401G BADGE	Managing Decisions in IBM Operational Decision Manager V8.9 <i>IBM Operational Decision Manager Standard V8.9 Business Analyst</i>	SPVC Free Badge
	CP4Auto	ZB402G BADGE	Developing Rule Solutions in IBM Operational Decision Manager V8.9.2 <i>IBM Operational Decision Manager Standard V8.9.2 Developer</i>	SPVC Free Badge
	CP4Auto	ZB403G	Developing Solutions with IBM Decision Server Insights V8.10	SPVC

Step 1

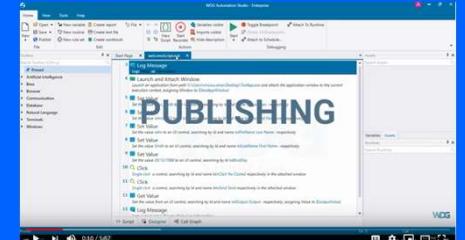
– Get Started

Start Here

YouTube videos introducing the product



- [Overview of RPA as a Service with WDG](#)
- [Download & Setup](#)
- [How to create basic script](#)
- [How to debug a script](#)
- [How to publish a script](#)
- [Dashboarding](#)
- [Interactive Virtual Assistant \(IVA\)](#)
- [OCR Introduction](#)
- [Extend your data capture apps with RPA \(Also available as \[a demo asset\]\(#\) featuring Mobile Capture, Datacap, and RPA. \)](#)



*To access the training, it is required to [signup](#) for an IBMid with your company email id first.

IBM Education Badges

Badge	Courses to complete	Duration
Basic	Installing IBM Robotic Process Automation with WDG	2 hours
	Installing IBM Robotic Process Automation with WDG in an On-Premise Environment	1 hour
	IBM Robotic Process Automation with WDG - Basic I	3 hours
	IBM Robotic Process Automation with WDG - Basic II	2 hours
Intermedia	IBM Robotic Process Automation with WDG - Intermediate I	2 hours
	IBM Robotic Process Automation with WDG - Intermediate II	2 hours
Advance	IBM Robotic Process Automation with WDG – Reports	1 hour
	IBM Robotic Process Automation with WDG – Regex	½ hour
	IBM Robotic Process Automation with WDG - IVA	2 hours
	IBM Robotic Process Automation with WDG – Database	1 ½ hours

IBM Process Mining



IBM Process Mining is an IBM feature of IBM Automation, that leverages myInvenio, a process mining product from myInvenio. These courses were created by myInvenio.

Job Role / Skills: Architect / Consultant / Data Scientist / Developer - Software / Systems Integrator

Intermediate Multiple 5 Assets

What Outcome(s) are you aiming for?

IBM Process Mining

IBM Process Mining (5)

Partners. Here is the external link to access the e-Learning content:

https://www.ibm.com/training/journey_description?journeyId=202

Many sellers & partners have been requesting this information so please cascade to your teams and get the word out.

Since that Box link is not available to partners, this link has some good information for partners to get started: [Seismic Search](#)

Leverage Process Mining as an on-ramp for Hyperautomation and to accelerate automation adoption:

- Pinpoint activities that should be automated (e.g. by an RPA bot).
- Use BPMN diagrams from process mining to start documenting to-be processes in BlueWorks Live.
- Import BPMN diagrams from process mining into workflow as a skeleton automated workflow.
- Use BAI operational data store as input into process mining to analyze improvements in processes that emit BAI events.
- Wrap AI around mining results and use machine learning to identify patterns and suggested next steps.

IBM Process Mining (5)

IBM Process Mining: Business Process Analyst (Code DLP-DL09018G)

Basic | 4.5 hours | Self-paced | No Cost

This course teaches the student about the myInvenio solution.

IBM Process Mining Business Analyst

Intermediate | 0.0 hour | Self-paced | No Cost

The earner knows how to use IBM Process Mining to improve business processes and find automation candidates. The earner can autonomously load event logs, interpret process visualizations, check conformance, create KPIs, create simulation scenarios, a

IBM Process Mining: Data Analyst (Code DLP-DL09020G)

Basic | 4.0 hours | Self-paced | No Cost

This course teaches the student about the myInvenio solution.

IBM Process Mining Data Analyst

Intermediate | 0.0 hour | Self-paced | No Cost

The badge earner knows how to use IBM Process Mining to improve business processes and find automation candidates. In addition, the earner understands the architecture of Process Mining, and how to adapt a project to business needs: preparing the dat

IBM Process Mining: Tech Expert (Code DLP-DL09021G)

Basic | 2.0 hours | Self-paced | No Cost

This course teaches the student about the myInvenio solution.



IBM Cloud Pak for Automation Badge



IBM Cloud Pak for Automation - Developer

The badge earner understands the capabilities delivered by IBM Cloud Pak for Automation, and has gained the developer skills needed to create applications using the components comprising Cloud Pak for Automation on Red Hat OpenShift. The badge earner can navigate the digital business automation reference architecture to implement common use cases in digital business automation.

[>Earn this badge](#)



IBM Cloud Pak for Automation - Architect

The badge earner understands the capabilities delivered by IBM Cloud Pak for Automation, and has gained the architect level skills needed to design and architect applications using the components comprising Cloud Pak for Automation on Red Hat OpenShift. The badge earner can navigate the digital business automation reference architecture, apply models for analyzing business operation and gaining insights, and create architectures for common use cases in digital business automation.

[>Earn this badge](#)



IBM Cloud Pak for Automation, Installation and Administration

The badge earner understands the business value of the IBM Cloud Pak for Automation, how to install some of the containerized products included in the Cloud Pak, and how Red Hat OpenShift works with the IBM Cloud Pak containers. The badge earner also has basic skills to manage, troubleshoot, and administer the installed containerized products that are deployed on the Red Hat OpenShift environment.

[>Earn this badge](#)



IBM Business Process Manager Advanced V8.6 Developer

The holder of this badge understands how to use Process Designer and Integration Designer, as well as the value of Service Component Architecture, Business Choreography, and other BPM features in developing the best solution for each process.

[>Earn this badge](#)



IBM FileNet P8 Platform V5.5.x - Administration

This badge earner understands core concepts and architecture and demonstrates skills in configuring and administering an IBM FileNet P8 Platform system. The individual can build object stores, configure metadata, create storage areas, manage security, logging, and auditing, run bulk processing, use the sweep framework, extend the functionality with events and subscription, configure searches, and migrate assets between IBM FileNet P8 Platform environments.

[>Earn this badge](#)



IBM Cloud Pak for Automation - Developer

The badge earner understands the capabilities delivered by IBM Cloud Pak for Automation, and has gained the developer skills needed to create applications using the components comprising Cloud Pak for Automation on Red Hat OpenShift. The badge earner can navigate the digital business automation reference architecture to implement common use cases in digital business automation.

[>Earn this badge](#)



IBM Cloud Pak for Automation - Architect

The badge earner understands the capabilities delivered by IBM Cloud Pak for Automation, and has gained the architect level skills needed to design and architect applications using the components comprising Cloud Pak for Automation on Red Hat OpenShift. The badge earner can navigate the digital business automation reference architecture, apply models for analyzing business operation and gaining insights, and create architectures for common use cases in digital business automation.

[>Earn this badge](#)



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[>Earn this badge](#)

IBM Process Mining Business Analyst
IBM Cloud Intermediate



IBM Robotic Process Automation
IBM Cloud Foundational



IBM Business Automation Workflow V20 Developer
IBM Cloud Intermediate



