

# IBM Cloud Pak for Business Automation Demos and Labs 2021

## End to End Demo for Cloud Pak for Business Automation Using Client Onboarding Scenario

V 1.0

Olaf Hahnl, Ph.D.  
[Olaf.Hahnl@de.ibm.com](mailto:Olaf.Hahnl@de.ibm.com)

Swapnil Agrawal  
[aswapnil@ca.ibm.com](mailto:aswapnil@ca.ibm.com)

## NOTICES

This information was developed for products and services offered in the USA.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing  
IBM Corporation  
North Castle Drive, MD-NC119  
Armonk, NY 10504-1785  
United States of America

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

## TRADEMARKS

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at "Copyright and trademark information" at [www.ibm.com/legal/copytrade.shtml](http://www.ibm.com/legal/copytrade.shtml).

Adobe, the Adobe logo, PostScript, and the PostScript logo are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States, and/or other countries.

Cell Broadband Engine is a trademark of Sony Computer Entertainment, Inc. in the United States, other countries, or both and is used under license therefrom.

Intel, Intel logo, Intel Inside, Intel Inside logo, Intel Centrino, Intel Centrino logo, Celeron, Intel Xeon, Intel SpeedStep, Itanium, and Pentium are trademarks or registered trademarks of Intel Corporation or its subsidiaries in the United States and other countries.

IT Infrastructure Library is a Registered Trade Mark of AXELOS Limited.

ITIL is a Registered Trade Mark of AXELOS Limited.

Java and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates.

Linear Tape-Open, LTO, the LTO Logo, Ultrium, and the Ultrium logo are trademarks of HP, IBM Corp. and Quantum in the U.S. and other countries.

Linux is a registered trademark of Linus Torvalds in the United States, other countries, or both.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

UNIX is a registered trademark of The Open Group in the United States and other countries.

© Copyright International Business Machines Corporation 2020.

This document may not be reproduced in whole or in part without the prior written permission of IBM.

US Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

# Table of Contents

<b>1 Introduction .....</b>	<b>4</b>
1.1 Cloud Pak for Business Automation.....	4
1.2 Lab Setup Instructions .....	4
<b>2 Exercise: Onboarding a Client with Low Confidence Level (Manual Intervention) .....</b>	<b>5</b>
2.1 Introduction .....	5
2.2 Exercise Instructions.....	5
2.2.1 Taking the call from Legacy Consulting and collecting base information .....	5
2.2.2 Verifying required documents and submitting the onboarding request .....	10
2.2.3 Onboarding request confirmation page.....	12
2.2.4 Checking the Review Client Onboarding Request task for the Account Mgr.....	12
2.2.5 Checking the automatic email to Legacy Consulting.....	15
2.2.6 Checking the Client Rep notification about rejected onboarding.....	15
2.2.7 Review of Stages Performed Automatically .....	16
<b>3 Exercise: Explore the Business Performance Center Dashboard .....</b>	<b>19</b>
3.1 Introduction .....	19
3.2 Exercise Instructions.....	19
<b>4 Optional Exercise: Onboarding a Client with High Confidence Level (Fully Automated) .....</b>	<b>21</b>
4.1 Introduction .....	21
4.2 Exercise Instructions.....	21
4.2.1 Taking the call from Automation Elite Inc. and collecting base information .....	21
4.2.2 Verifying required documents and submitting the onboarding request .....	24
4.2.3 Onboarding request confirmation page.....	27
4.2.4 Checking the automatic email to Automation Elite Inc.....	27
4.2.5 Checking the Client Rep notification about automated onboarding .....	28
4.2.6 Review of Stages Performed Automatically .....	31

# 1 Introduction

This lab is based on the use case of a simplified version of a **Client Onboarding solution** as part of **Focus Corp's service business**. Although intended to be realistic, it is fictitious, simplified and is meant to showcase key aspects of the Cloud Pak for Business Automation in an easy and quick way.

This scenario highlights selected business functions and technical integration points across the Cloud Pak for Business Automation. It showcases how combining these platform capabilities can be used to build an end-to-end business solution that helps to digitize all aspects of business operations.

This lab focuses on the business user experience executing a client onboarding from start to finish, not developing the solution itself.

## 1.1 Cloud Pak for Business Automation

IBM Cloud Pak for Business Automation is a set of integrated market-leading software, running on top of Red Hat OpenShift and therefore built for any hybrid cloud, and designed to help you solve your toughest operational challenges.

With AI-generated recommendations, analytics to measure impact, and business-friendly low-code tooling, IBM Cloud Pak for Business Automation helps customers to significantly reduce the amount of time spent on manual processes. Specialized business automation capabilities — for content, decisions, RPA, workflows, and document processing — are built on top of powerful automation services from the Automation foundation. Using the process mining and operational intelligence capability, you can get insight into how your processes run, visualize issues, pinpoint fixes, and prioritize actions.

The products are integrated in many ways. Automation Services and an Automation Service catalog are the latest additions to the existing features of APIs and reusable UI libraries. Currently Workflow and Automation Decision Services from the Decision capability can publish automation services while Automation Application Designer and Workflow can consume automation services. Automation services allows discovery and usage of services within the Cloud Pak without the need to consider technical aspects like offering product, protocols, authentication/authorization etc. This makes them especially suitable to no-code consumption through business users.

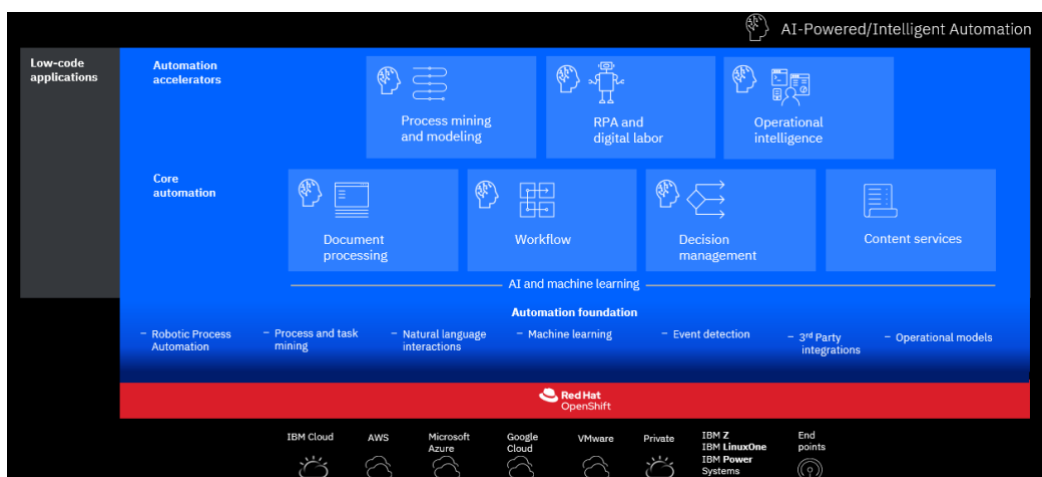


Figure 1: Marchitecture of the IBM Cloud Pak for Business Automation

## 1.2 Lab Setup Instructions

If you are performing this lab as a part of an IBM event, access the document that lists the available systems and URLs along with login instructions. For this lab, you will need to access the **Client Onboarding Desktop**.

## 2 Exercise: Onboarding a Client with Low Confidence Level (Manual Intervention)

### 2.1 Introduction

In this exercise Legacy Consulting wants to subscribe to two services from Focus Corp's healthcare services.

You will first take the role of the client representative, a Focus Corp employee, who is on the phone with Legacy Consulting for this request. Initially, you collect all the required information before you submit the request.

Based on the information collected so far, a scoreboarding activity will classify Legacy Consulting as a Segment 2 client with a high-risk profile and an assessment confidence of less than 75%.

Under these circumstances, the request cannot be handled automatically and will require handling by an account manager. You will take over the role of the account manager to manually review the request. As the default risk is too high, you will reject the onboarding request. The client will be informed via email as will be the client representative via a notification task as they initiated the onboarded request.

This path through the onboarding scenario exemplifies that often for complex, high value, high risk decisions or those where a machine generated decision has low confidence, knowledge workers need to make the final decision. The decision made by a human can then be used to further train the machine learning model so for future cases even more automation is possible.

### 2.2 Exercise Instructions

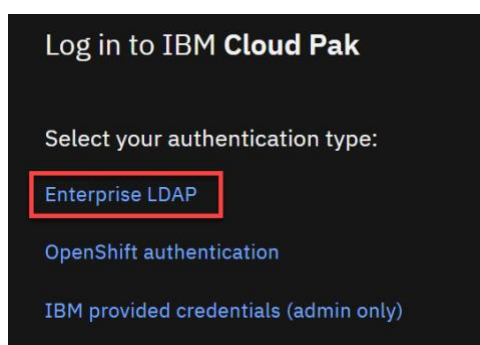
You will use the same user to perform all tasks even when assuming the different roles of Client, Client Representative, and Account Manager. To remind you which role you currently perform, most screens show an icon and label in the top right corner. In this flow the ones for the Client Representative and Account Manager.



#### 2.2.1 Taking the call from Legacy Consulting and collecting base information

\_1. Navigate to the **Client Onboarding Desktop** using the link provided.

\_2. **Select Enterprise LDAP** on the Log in to IBM Cloud Pak page



\_3. **Login** with the username and password that has been assigned to you.

\_4. As the **Client Representative** (see icon in the top right corner) **explore** the first page of the Client Onboarding app.

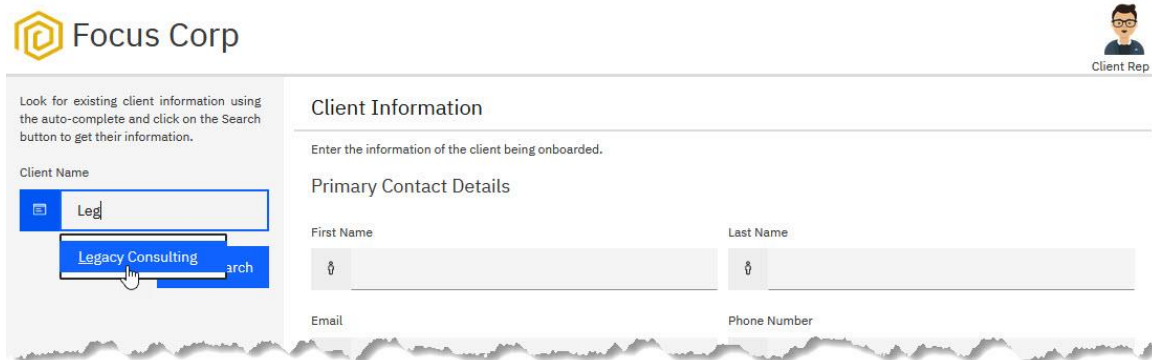
It provides means to search for an existing client by name, enter various information about the client, a selector for the industry for which Focus Corp offers services, a list of services the client can sign up for, and the ability to calculate the services fee based on the selection.

The screenshot shows the 'Client Onboarding' interface in a desktop browser window. The header is dark with a hamburger menu, the text 'Client Onboarding', and icons for help, user profile, and settings. The main content area has a white background. On the left, there's a search section with the Focus Corp logo, a text input for 'Client Name', and a blue 'Search' button. On the right, the 'Client Information' section is titled 'Primary Contact Details' and contains four input fields: 'First Name', 'Last Name', 'Email', and 'Phone Number'. A 'Client Rep' profile picture is shown in the top right corner. The bottom of the image has a torn paper effect.

When you resize the browser window you will observe that the page is responsive. That means that a single app can be designed that it can easily be used on a large screen like a desktop/laptop, on a tablet, or mobile phone.

The screenshot shows the same 'Client Onboarding' interface but in a mobile browser window. The layout is responsive, with the search section and 'Client Information' section stacked vertically. The 'Client Rep' profile picture is now smaller and positioned above the search section. The bottom of the image has a torn paper effect.

\_5. **Type Leg** in the **Client Name** text field in the left panel to search for **Legacy Consulting** which is an existing client of Focus Corp.



Focus Corp

Client Rep

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

Client Name

Leg

Legacy Consulting

Search

Client Information

Enter the information of the client being onboarded.

Primary Contact Details

First Name

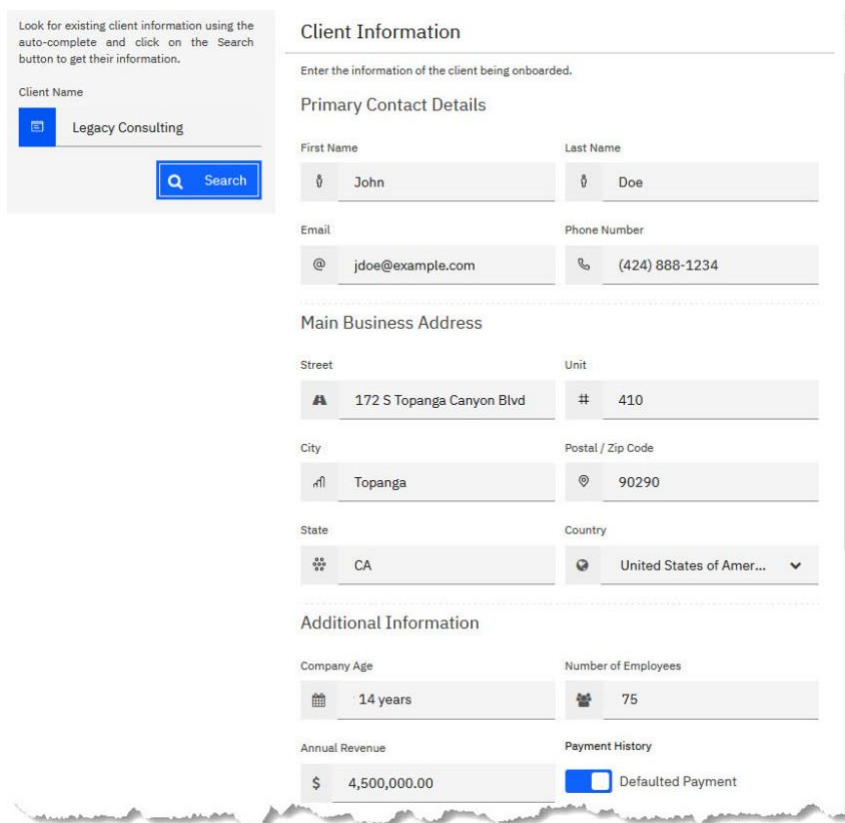
Last Name

Email

Phone Number

\_6. **Click on Legacy Consulting** once the type ahead feature offers it.

\_7. **Click on Search** to load the details for the client. It retrieves the client details using integration with the Workflow capability.



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

Client Name

Legacy Consulting

Search

Client Information

Enter the information of the client being onboarded.

Primary Contact Details

First Name

Last Name

Email

Phone Number

Main Business Address

Street

Unit

City

Postal / Zip Code

State

Country

Additional Information

Company Age

Number of Employees

Annual Revenue

Payment History

14 years

75

\$ 4,500,000.00

Defaulted Payment

\_8. **Optionally, replace** the **email address** jdoe@example.com with an email address of your choice that you can use to receive client emails associated with the scenario.

\_9. **Select Healthcare** in the **Industry** drop-down list as Legacy Consulting requests to onboard to two services in that domain.

\$ 4,500,000.00 ☐ Defaulted Payment

---

Service Onboarding Information

Select the industry for which the services are being offered

Federal  
Federal  
Finance  
**Healthcare**  
Insurance  
Telecom

Select the services that the client is interested in

☐ Education Funding  
☐ Green Technology Equipment  
☐ Infrastructure Consultation  
☐ Transport Security

Services Fee

\$

 Review Documents

\_10. **Check Employee Benefits Plan** and **Mental Health Care** as the services that Legacy Consulting wants to onboard to.

\$ 4,500,000.00 ☐ Defaulted Payment

---

Service Onboarding Information

Select the industry for which the services are being offered

Healthcare

Select the services that the client is interested in

☒ Employee Benefits Plan  
☒ Mental Health Care  
☐ Onsite Medical Testing  
☐ Virtual Medical Assistance

**Calculate Services Fee**

Services Fee

\$

 Review Documents



\_11. **Click Calculate Services Fee** to calculate the fees and get upsell recommendations.

The screenshot shows a web form titled "Service Onboarding Information". At the top, there is a field for a dollar amount, currently set to "4,500,000.00", with a "Defaulted Payment" icon and label to its right. Below this is the section header "Service Onboarding Information". Underneath, there are two columns of options. The left column is labeled "Select the industry for which the services are being offered" and contains a dropdown menu with "Healthcare" selected. The right column is labeled "Select the services that the client is interested in" and contains four checkboxes: "Employee Benefits Plan" (checked), "Mental Health Care" (checked), "Onsite Medical Testing" (unchecked), and "Virtual Medical Assistance" (unchecked). Below these options is a blue button labeled "Calculate Services Fee". At the bottom of the form, there is a red-bordered box containing two sections: "Services Fee" with a dollar amount of "35,000.00", and "Additional services the client may be interested in" with "Onsite Medical Testing" listed. To the right of this box is another blue button labeled "Review Documents".

The fees are calculated by an external service pricing engine build using prescriptive rules. The additional services that the client rep could offer as upsell opportunity to the client are currently also based on prescriptive rules but could also be generated based on a machine learning model.

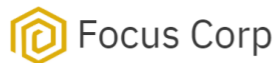
\_12. **Click Review Documents** to navigate to the next page.



## 2.2.2 Verifying required documents and submitting the onboarding request

### \_1. **Explore** the second page of the Client Onboarding app.

The left pane lists all information provided on the previous page. On the right pane all documents that may be relevant to this onboarding request are listed with their individual status of either Pending (Default), Verified, or Not Required. At the bottom a list of all potentially relevant documents Focus Corp already has for Legacy Consulting is shown.



### Legacy Consulting

#### Primary Contact Details

John Doe  
424-888-1234  
jdoe@example.com

#### Main Business Address

410-172 S Topanga Canyon Blvd  
Topanga, CA - 90290  
USA

#### Additional Information

Company Age	14 years
Number of Employees	75
Annual Revenue	\$4,500,000
Defaulted Payment	Yes

#### Service Onboarding Information

Services Fee \$35,000  
Services Requested  
Employee Benefits Plan  
Mental Health Care

### Review Documents

Review existing documents and mark them as pending if they need to be (re)uploaded.

Document Name	Document Status
Banking Information	Pending
Certificate of Incorporation	Pending
Primary Contact ID	Pending

Select the documents that you want to associate with this request

<input type="checkbox"/>	Name
<input type="checkbox"/>	Legacy Consulting - Banking Information
<input type="checkbox"/>	Legacy Consulting - Certificate of Incorporation

Items per page: 201-2 of 2 items

\_2. **View** the **Legacy Consulting – Banking Information** document by **clicking** the **three dots** at the right end of the row that appear when you hover over the line and **selecting View**. This opens the document in the integrated viewer. Afterwards **close** the viewer **window** again.

Select the documents that you want to associate with this request

<input type="checkbox"/>	Name
<input type="checkbox"/>	Legacy Consulting - Banking Information
<input type="checkbox"/>	Legacy Consulting - Certificate of Incorporation

Items per page: 201-2 of 2 items

View  
Download  
Properties

Client Onboarding Viewer - Google Chrome

Legacy Consulting - Banking Information

Banking Information

This banking information provided here will be used by Focus Corp to withdraw the monthly services fee.

Client Name  
Legacy Consulting

Bank Name  
XYZ Bank

Bank Phone Number  
+1-213-111-7890

Bank Address  
887 Cypress Rd, Garden Grove, CA 92840

Routing Number  
32043559

\_3. Select Verified for Banking Information and Certificate of Incorporation.

\_4. Select Not Required for Primary Contact ID.

This reflects the documents required for the selected service and the fact that the first two documents are already available. With the Capture capability it would be possible to upload the primary contact ID after submitting the client onboarding request. This would then extract structured information from the unstructured ID and create a new review task for the Client Rep in the Document Review stage of the Workflow. As we don't have the Capture capability installed, we will mark the document as **Not Required**.

\_5. **Check the boxes for the two documents** (Legacy Consulting – Certificate of Incorporation and Legacy Consulting - Banking Information) in the document list at the bottom to make these two documents part of the request when you submit the onboarding request.

Legacy Consulting

**Primary Contact Details**

John Doe  
424-888-1234  
jdoe@example.com

**Main Business Address**

410-172 S Topanga Canyon Blvd  
Topanga, CA - 90290  
United States of America

**Additional Information**

Company Age 14 years  
Number of Employees 75  
Annual Revenue \$4,500,000  
Defaulted Payment Yes

**Service Onboarding Information**

Services Fee \$35,000  
Services Requested  
Employee Benefits Plan  
Mental Health Care

**Review Documents**

Review existing documents and mark them as pending if they need to be (re)uploaded.

Document Name	Document Status
Banking Information	Verified
Certificate of Incorporation	Verified
Primary Contact ID	Not Required

Select the documents that you want to associate with this request

Legacy Consulting

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Legacy Consulting - Banking Information
<input checked="" type="checkbox"/>	Legacy Consulting - Certificate of Incorporation

Items per page: 20 1-2 of 2 items

Back Submit Onboarding Request

\_6. **Click Submit Onboarding Request** to complete Legacy Consulting's request and navigate to the final confirmation page.

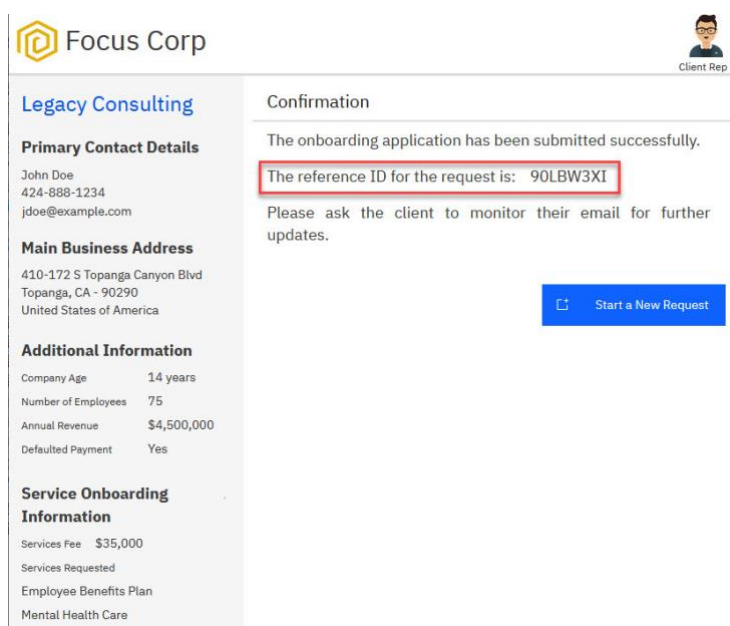
The submission may take a few seconds during which you might notice a little spinner icon next to the Client Rep icon. Please wait until you are taken to the third page.



### 2.2.3 Onboarding request confirmation page

\_1. **Explore** the third page of the Client Onboarding app.

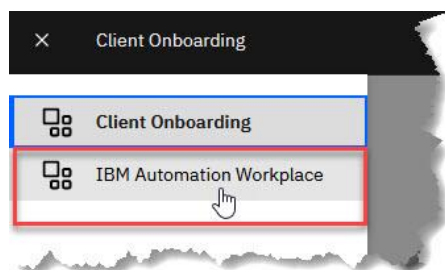
The left pane again lists all information provided on the first page. The right-hand side provides a reference ID for the request that the client rep can share with the client and a comment that an email was sent to the client about their request.



\_2. **Click on Start a New Request** to get back to the first page to be able to continue onboarding the next client in the next exercise.

### 2.2.4 Checking the Review Client Onboarding Request task for the Account Mgr

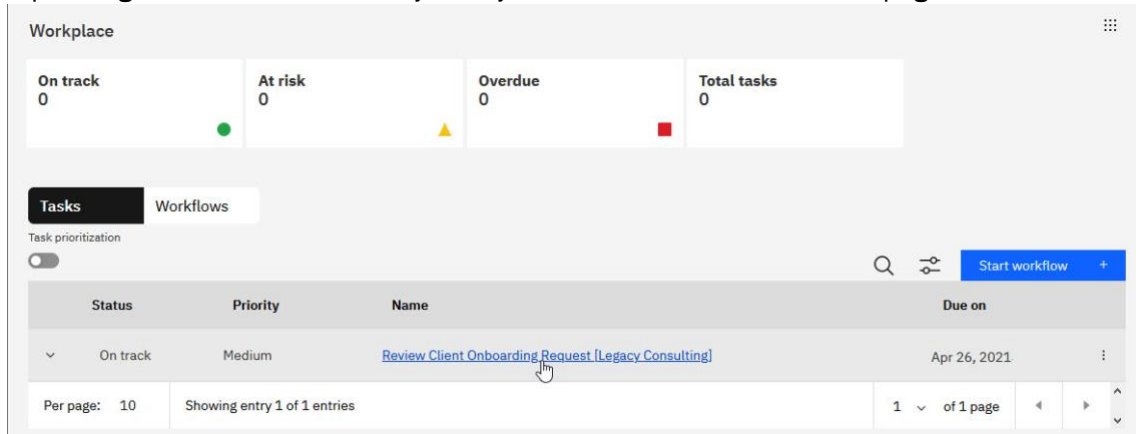
\_1. **Click** on the **hamburger menu icon** in the top left corner and **select IBM Automation Workplace** to switch from the Client Onboarding app to your general workplace. After a short moment it shows the tasks available to you.



When you complete a task, the task may still be shown for some seconds in the task list. It will disappear when the task list auto-refreshes itself.

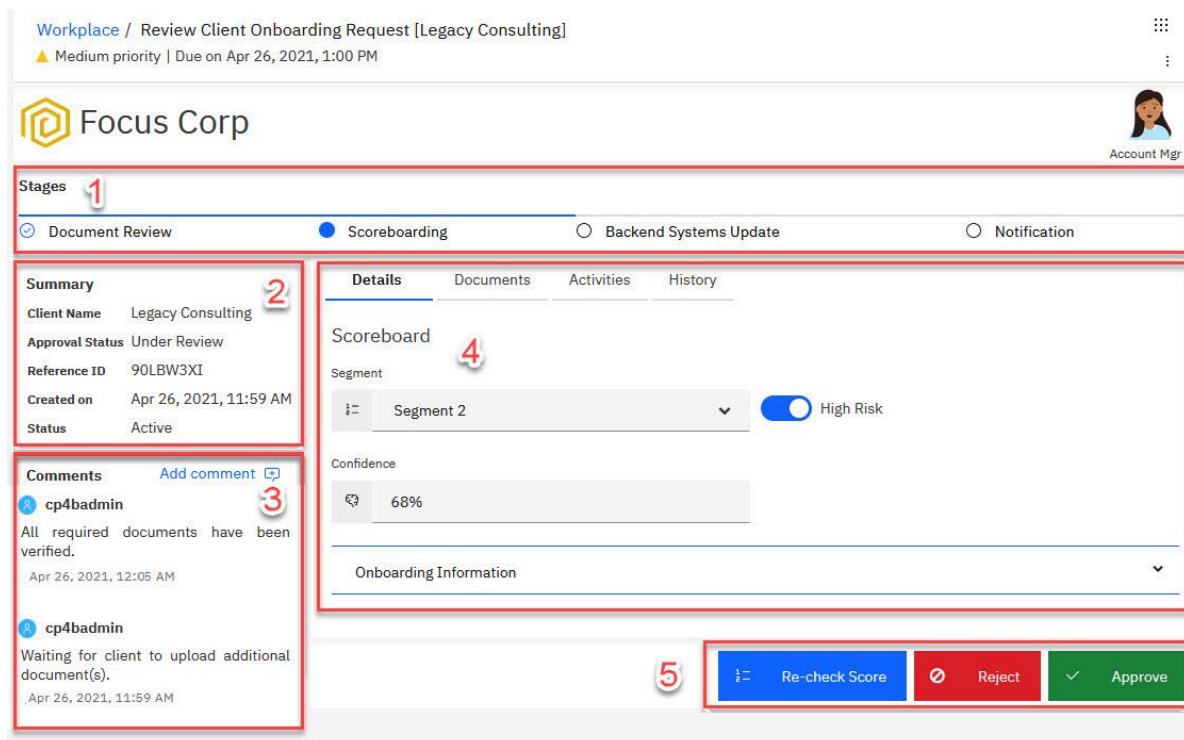
**\_1. Open the task that is available to you by clicking on it.**

If the task is not showing up after some time, you may not have changed the status of the documents to Verified or Not Required. In this case, you can always resubmit the Client Onboarding request using the Client Onboarding application or reach out to one of the instructors for help. Depending on the network latency it may take a moment until the task page is loaded.



**\_2. Explore the task page.**

The icon in the top right signifies that you are performing this task as an Account Manager. At the top (1) the four stages of the request processing are shown. This task is part of the scoreboarding stage where you as the account manager have to manually assess those onboarding requests that have a confidence below 75%. The first panel on the left (2) provides a summary of the request, mainly the Client Name, Reference ID and the Approval Status. The panel below (3) contains comments related to the request, for example that all required document have been verified. The main panel on the right (4) has four tabs. On the Details tab the scoreboard is shown that contains the segmentation, Legacy Consulting belonging to the Segment 2 clients, the risk assessment, here High Risk, and the Confidence for the risk assessment, here with 68% being below the threshold to take an automatic decision based on the risk (the actual values may differ slightly in your onboarding request).



\_3. **Expand the Onboarding Information** section by clicking on the section header.

Confidence  
68%

Onboarding Information

\_4. **Modify the Annual Revenue** to be **\$45,000,000** instead of \$4,500,000 (add an extra 0).

State: CA Country: United States of America

Additional Information

Company Age: 14 years Number of Employees: 75

Annual Revenue: \$ 45,000,000

Defaulted Payment: ☒

Re-check Score Reject Approve

\_5. **Click Re-check Score** (5) to reevaluate the scoreboard and **observe** that the **risk** changed to low, and the **confidence** was computed to be 100%.

Client Onboarding

Workplace / Review Client Onboarding Request [Legacy Consulting]

Medium priority | Due on Apr 26, 2021, 1:00 PM

Focus Corp

Account Mgr

Stages

Document Review Scoreboarding Backend Systems Update Notification

Summary

Client Name: Legacy Consulting

Approval Status: Under Review

Reference ID: 90LBW3XI

Created on: Apr 26, 2021, 11:59 AM

Status: Active

Comments: Add comment

cp4badmin

Properties Documents Activities History

Scoreboard

Segment: Segment 2

Low Risk

Confidence: 100%

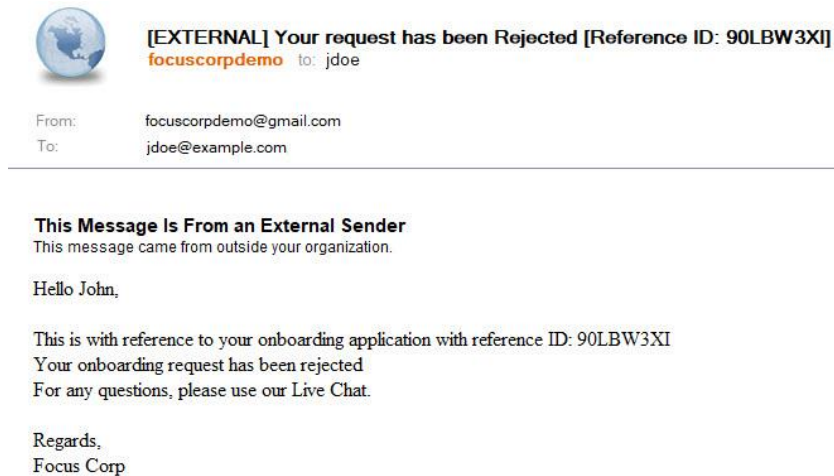
\_6. Optionally, change the Annual Revenue back to \$4,500,000 (remove the extra 0) and perform the scoreboarding a final time by clicking Re-check Score.

\_7. **Click Reject** (5) to reject the onboarding request by Legacy Consulting as you the account manager consider the risk to be too high.

This will trigger an email to be sent to the client with the final onboarding decision.

## 2.2.5 Checking the automatic email to Legacy Consulting

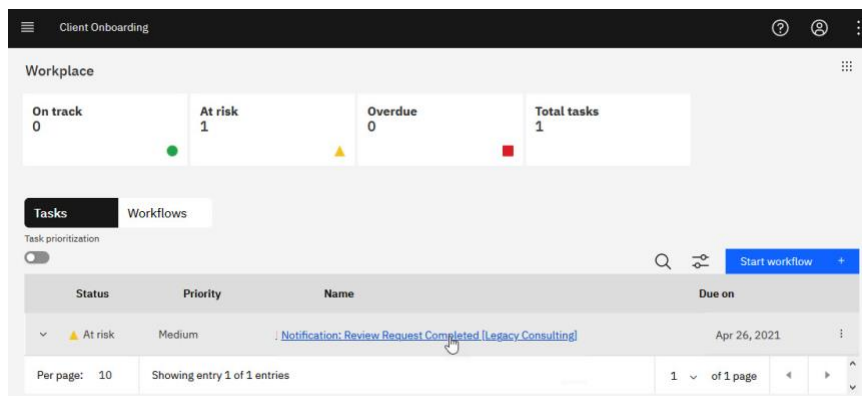
- \_1. **Open or bring to the front** your **email client** in case you have provided an email address on the first page that you can access.
- \_2. **Check** your inbox for an email from **focuscorpdemo**



- \_3. The email contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request has been rejected.

## 2.2.6 Checking the Client Rep notification about rejected onboarding

- \_1. **Switch** back from the email client to the browser window containing the **Client Onboarding app**.
- \_2. **Open** the **task** that is available to you as client representative by **clicking on it**.





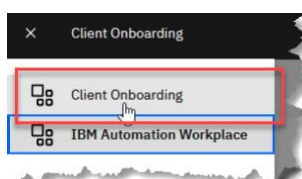
\_3. **Observe the Approval Status** task page that shows that the client onboarding request was rejected.

The screenshot shows the 'Client Onboarding' task page. At the top, a notification bar indicates 'Workplace / Notification: Review Request Completed [Legacy Consulting]' with a medium priority and a due date of Apr 26, 2021, 1:32 PM. Below this, the 'Focus Corp' logo is visible. The 'Stages' section shows four stages: Document Review, Scoreboarding, Backend Systems Update, and Notification. The 'Summary' section on the left lists: Client Name: Legacy Consulting, Approval Status: Rejected (highlighted with a red box), Reference ID: 90LBW3XI, Created on: Apr 27, 2021, 2:30 PM, and Status: Active. The 'Comments' section shows three comments from 'cp4badmin' dated Apr 26, 2021. The 'Properties' section on the right shows 'Scoreboard' with 'Segment 2' selected and a 'High Risk' toggle. A 'Confidence' bar shows 68%. At the bottom right, there is a blue button labeled 'Complete Onboarding Request'.

\_4. **Click Complete Onboarding Request** to complete the task. This closes the task and brings you back to the now empty work list for the client rep.

The screenshot shows the 'Workplace' interface with a task list. The task list is empty, displaying 'No tasks to display.' and a note: 'A task is an atomic unit of work that is included in a workflow activity, case, or process.'

\_5. **Click on the hamburger menu icon** in the top left corner and **select Client Onboarding** to switch back to the Client Onboarding app.



This completes the part of the exercise where you actively perform steps.

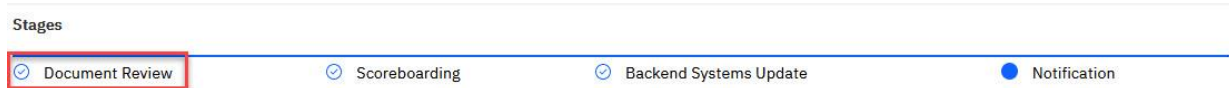
## 2.2.7 Review of Stages Performed Automatically

This section provides information on how different aspects that happen automatically as part of the Client Onboarding are performed. You will not actively need to perform any steps, just read about them. In the chapter three you will again work directly with the Client Onboarding solution.

As part of the above client onboarding workflow, you worked on the second (Scoreboarding) and fourth (Notification) stage of the request processing. The first (Document Review) and the third (Backend Systems Update) stages were automatically completed, and no manual activities needed to be performed.

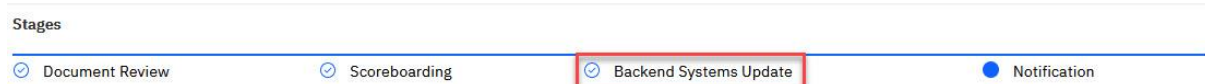


### 2.2.7.1 Document Review



The first stage during processing the onboarding request is the Document Review stage. For the above request you have specified in the app that two documents are already verified and the third is not required. Therefore, this stage completes automatically.

### 2.2.7.2 Backend Systems Update



As part of the Backend Systems Update stage, Focus Corp needs to update some of its legacy systems of record:

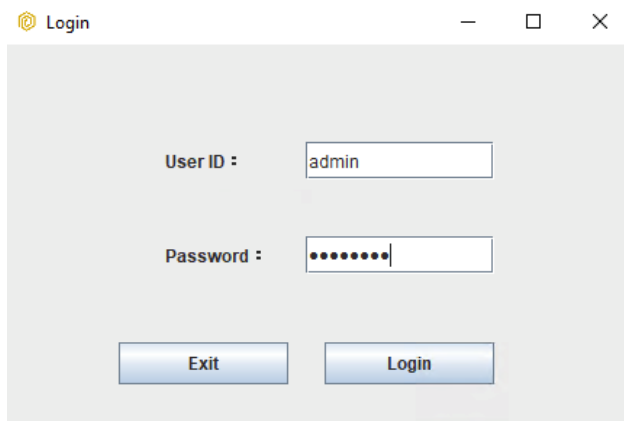
- The first is the Client Management System. It offers a Java rich client to add or update data.
- The second is the Service Management System. It offers a web interface to interact with it.

As Focus Corp strives for a high level of automation, they want to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply Robotic Process Automation (RPA).

The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates the following screenshots explain the steps performed.

The first step is to create a client record or updating an existing client record in the Client Management System and to retrieve the Client ID for the client:

- The bot **starts** the **Client Management System** (with a Java UI) and **logs into it**.



- The bot enters all values from the Client Onboarding solution into the respective fields and clicks on the **Add/Update Client** button and retrieves the **Client ID** from the output text.

Client Management System

Client Name: Legacy Consulting

Onboarding Status: Rejected

Primary Contact

Name: John Doe Phone: 424-888-1234

Email: jdoe@example.com

Client Address

Street: Topanga Canyon Blvd Unit: 410

City: Topanga State: CA

Zip Code: 90290 Country: USA

Company Age: 14

Number of Employees: 75

Financial History

Annual Revenue(\$): 4500000

☒ Defaulted Payment

Segment

☐ Segment 1

☒ Segment 2

Legacy Consulting has been added or updated into system with Client ID: 66083728

Add/Update Client Query Exit

- Finally, it **closes** the Client Management System by **clicking** on **Exit**.

As we rejected the onboarding request in the Scoreboarding stage, the bot does not need to record the services the client wants to onboard to in the Service Management System.

These two System of Records in our scenario are just mockups of potential real client systems. They represent systems that don't offer APIs at all to programmatically interact with them or where parts like updates are just exposed through the native UI and not an API. Such systems can easily be automated using the RPA capability.

## 3 Exercise: Explore the Business Performance Center Dashboard

### 3.1 Introduction

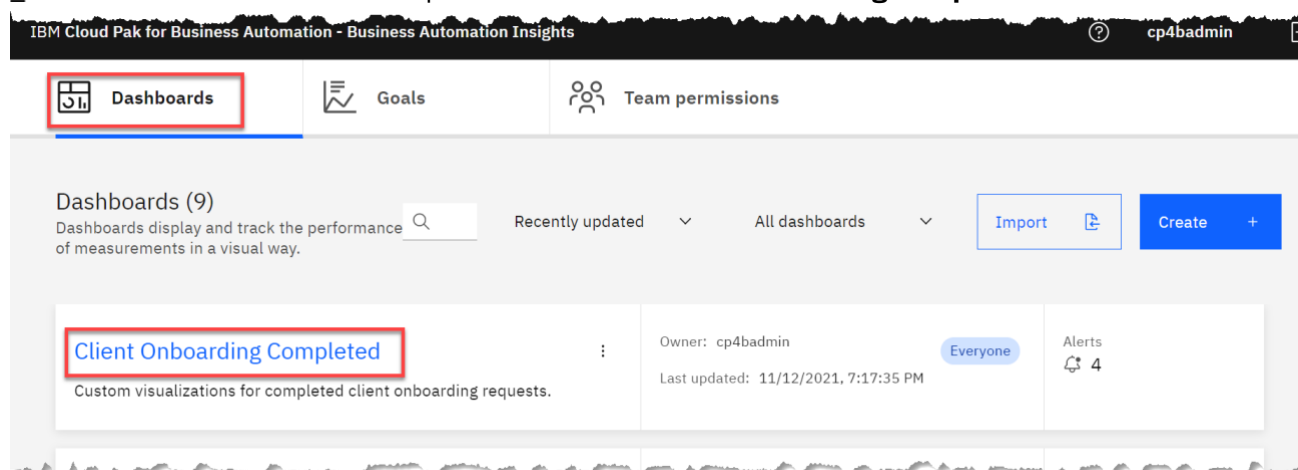
In this exercise you will switch into the role of the business owner of the Client Onboarding business of Focus Corp. As the business owner, you need to understand how your business performs and what actions to take to expand your business or course correct if needed.

For this purpose, you will make use of **Business Performance Center** (BPC) as part of **IBM Business Automation Insights** (BAI). BPC provides easy to use and meaningful dashboards to visualize business relevant KPIs for lines of business users to have a near real-time view on their business operations.

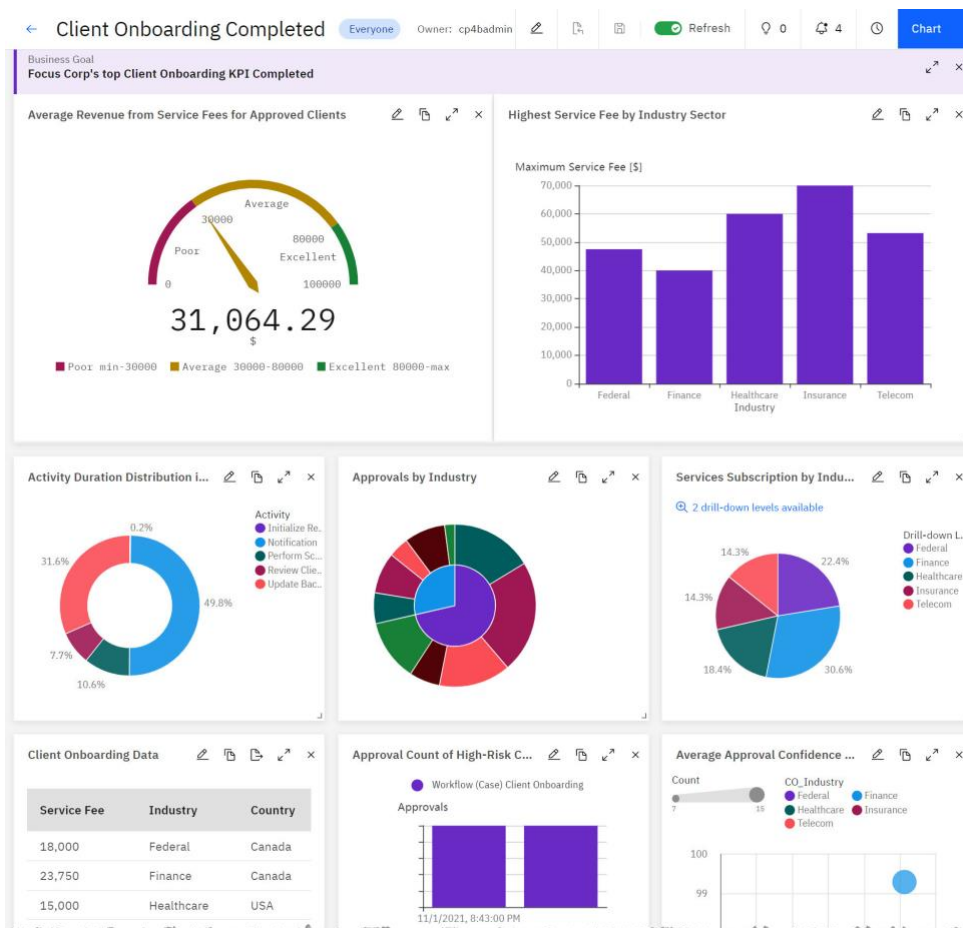
### 3.2 Exercise Instructions

You continue to use the same user to access the BPC dashboard. You will see live data, so it may differ from the screenshot shown and may change over time as you are other participants perform onboarding requests.

- \_1. Navigate to the IBM Business Performance Center (BPC) using the link for your environment.
- \_2. On the Dashboards tab that opens **click** on the **Client Onboarding Completed** dashboard.



- \_3. **Explore** the different types of charts and information in the dashboard.



Some examples of how to use the data based on the screenshot above are:

- In the **Approvals by Industry** chart (in the center) hover over the two segments in the inner circle to see which segment shows the approved and which the rejected on boarding request and their respective percentage. You can then hover over the segment in the outer circle to see from which industries these are coming and their percentage. You might for example see that your business is weak in the insurance sector (brown color above) with a significantly high number of onboarding requests being rejected. This may lead you to investigate this issue more deeply and start an advertisement campaign.
- This is especially true looking at the **Highest Service Fee by Industry Sector** chart (top-right corner) which indicates that in the Insurance industry you earn the highest service fees. You can also see that this chart is tied to a specific business goal. You can group charts by different business goals to create a more comprehensive dashboard.
- If the **Approval Count of High-Risk Cases** chart (second in the middle column) shows a high and potentially increasing number of approvals for high-risk onboarding request, you might want to investigate the cause of this. One reason might be that the machine learning model needs to be retrained or the threshold for the confidence changed. Another reason could be that your account managers approve to many high-risk onboarding requests to not loose business which may have a negative effect on the risk profile of your business.
- The **Completed Cases per Day** chart (bottom row; not seen in the screenshot) can help you to see the distribution of completed onboarding request per day over a period of time. It also provides you a forecast based on past activity. This can enable you to plan your budgets and capacity.

You will learn more about how to create these charts and learn additional details about them (setting goals, KPIs, drill downs, alerts, etc.) in the Business Automation Insights lab.

**The next exercise is optional. At this point, you have successfully completed the lab.**

## 4 Optional Exercise: Onboarding a Client with High Confidence Level (Fully Automated)

### 4.1 Introduction

Depending on how much time is left to perform this lab, in this optional exercise Automation Elite Inc. wants to subscribe to one service from Focus Corp's financial services.

This time you will take over the role of the client representative, a Focus Corp employee, who is on the phone with Automation Elite Inc. for this request. Initially, you collect all the required information before you submit the request.

Based on the information contained in the submission, the scoreboarding activity will classify Automation Elite Inc. as a Segment 1 client with a low risk profile and an assessment confidence greater than 75%. Therefore, this onboarding request will be handled automatically without a manual review required by the account manager. The client will be informed about the decision via email while you, as the client representative, will get a notification task as you initiated the onboarding request. This path through the onboarding scenario exemplifies one of the main goals when embarking on an automation journey, which is to automate business transactions as much as possible reducing the number of involved employees and therefore reducing cost, time required and manual errors.

### 4.2 Exercise Instructions

You will use the user assigned to you to perform all tasks as the client representative.

To remind you which role you currently perform, most screens show a Client Rep icon and label in the top right corner.

For this exercise, you will only assume the role of the Client Rep.



#### 4.2.1 Taking the call from Automation Elite Inc. and collecting base information

\_1. Navigate back to the Client Onboarding Desktop.

\_2. As the **Client Representative type Auto** in the **Client Name** text field in the left panel to search for **Automation Elite Inc.** which is an existing client of Focus Corp.

A screenshot of the Focus Corp Client Onboarding Desktop interface. The top left shows the Focus Corp logo. The top right shows a 'Client Rep' icon and label. The main area is divided into two panels. The left panel has a 'Client Name' section with a text input field containing 'Auto' and a 'Search' button. Below the input field, a dropdown menu is open, showing 'Automation Elite Inc.' as a suggestion. The right panel has a 'Client Information' section with a heading 'Enter the information of the client being onboarded.' and a 'Primary Contact Details' section with fields for 'First Name', 'Last Name', 'Email', and 'Phone Number'.

\_3. **Click on Automation Elite Inc.** once the type ahead feature offers it.

\_4. Click on **Search** to load the details for the client into the panel on the right. It retrieves the client details using integration with the Workflow capability.

Look for existing 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.

#### Primary Contact Details

First Name	Last Name
June Marie	Sample

Email	Phone Number
jmarie@example.com	(517) 555-0000

#### Main Business Address

Street	Unit
3974 Carson St	1A

City	Postal / Zip Code
Lansing	48911

State	Country
MI	United States of America

#### Additional Information

Company Age	Number of Employees
8 years	1,200

Annual Revenue	Payment History
\$ 50,000,000.00	<input type="checkbox"/> No Defaulted Payments

\_5. Optionally, replace the **email address** jmarie@example.com with an email address of your choice that you can use to receive emails for the client as you execute the scenario.

\_6. **Select Finance** in the **Industry** drop-down list as Automation Elite Inc. requests to onboard to one service in that domain.

Selecting an entry from the drop-down dynamically changes the options in the services to onboard.

\$ 50,000,000.00 ☐ No Defaulted Payments

---

### Service Onboarding Information

Select the industry for which the services are being offered

Federal  
Federal  
**Finance**  
Healthcare  
Insurance  
Telecom

Select the services that the client is interested in

☐ Education Funding  
☐ Green Technology Equipment  
☐ Infrastructure Consultation  
☐ Transport Security

Service  
\$ 0.00

**Review Documents**

\_7. **Check Corporate Credit Card** as the service that Automation Elite Inc. wants to onboard to.

\_8. Click **Calculate Services Fee** to calculate the fees and get potential upsell recommendations.

\$ 50,000,000.00 No Defaulted Payments

Service Onboarding Information

Select the industry for which the services are being offered

Finance

Select the services that the client is interested in

☒ Corporate Credit Card

☐ External Audit

☐ Tax Consultation

☐ Fraud Protection

**Calculate Services Fee**

Services Fee

\$ 0.00

Review Documents

The fees are calculated by an external service pricing engine build using prescriptive rules. The additional services that the client rep could offer as upsell opportunity to the client are currently also based on prescriptive rules but could also be generated based on a machine learning model.

\$ 50,000,000.00 No Defaulted Payments

Service Onboarding Information

Select the industry for which the services are being offered

Finance

Select the services that the client is interested in

☒ Corporate Credit Card

☐ External Audit

☐ Tax Consultation

☐ Fraud Protection

**Calculate Services Fee**

Services Fee

\$ 15,000.00

Additional services the client may be interested in

External Audit

Fraud Protection

Review Documents

\_9. Click **Review Documents** to navigate to the next page.

**Review Documents**



## 4.2.2 Verifying required documents and submitting the onboarding request

### \_1. Explore the second page of the Client Onboarding app.

The left pane lists all information provided on the previous page. On the right pane all documents that may be relevant to this onboarding request are listed with their individual status of either Pending (Default), Verified, or Not Required. At the bottom a list of all potentially relevant documents Focus Corp already has for Automation Elite Inc. is shown.

The screenshot shows the 'Automation Elite Inc.' onboarding page. The left sidebar contains company details: Primary Contact (June Marie Sample), Main Business Address (1A-3974 Carson St, Lansing, MI), Additional Information (Company Age: 8 years, Employees: 1200, Revenue: \$50,000,000), and Service Onboarding Information (Services Fee: \$15,000). The main area is titled 'Review Documents' and shows a table of documents with their status (all Pending). Below this is a section to select documents to associate with the request, displaying a list of files including 'Banking Information - Automation Elite Inc.pdf', 'June Marie - Driver's License.png', and 'Certificate of Incorporation - Automation Elite Inc.pdf'. At the bottom are 'Back' and 'Submit Onboarding Request' buttons.

Document Name	Document Status
Banking Information	Pending
Certificate of Incorporation	Pending
Primary Contact ID	Pending

Select the documents that you want to associate with this request

<input type="checkbox"/>	Name
<input type="checkbox"/>	Banking Information - Automation Elite Inc.pdf
<input type="checkbox"/>	June Marie - Driver's License.png
<input type="checkbox"/>	Certificate of Incorporation - Automation Elite Inc.pdf

Items per page: 20    1-3 of 3 items

Back    Submit Onboarding Request

\_2. View the **Banking Information – Automation Elite Inc.pdf** document by **clicking** the **three dots** at the right end of the row that appear when you hover over the line and **selecting View**. This opens the document in the integrated viewer. Afterwards **close** the viewer **window** again.

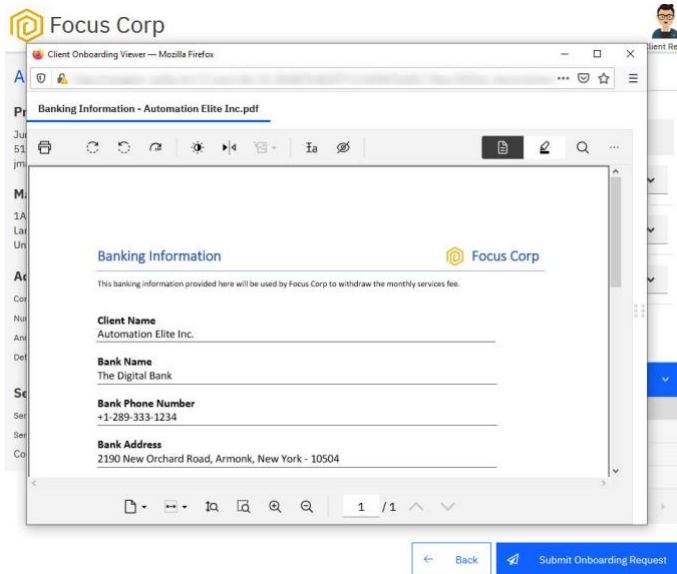
This close-up shows the document selection list. A context menu is open for the first item, 'Banking Information - Automation Elite Inc.pdf', with options for 'View', 'Download', and 'Properties'. The 'View' option is highlighted by the mouse cursor.

<input type="checkbox"/>	Name
<input type="checkbox"/>	Banking Information - Automation Elite Inc.pdf
<input type="checkbox"/>	June Marie - Driver's License.png
<input type="checkbox"/>	Certificate of Incorporation - Automation Elite Inc.pdf

Items per page: 20    1-3 of 3 items

View  
Download  
Properties





\_3. Select Verified for Banking Information and Primary Contact ID.

\_4. Select Not Required for Certificate of Incorporation.

This reflects the documents required for the selected service and the fact that these two documents are already available.

Focus Corp

Automation Elite Inc.

**Primary Contact Details**

June Marie Sample  
517-555-0000  
jmarie@example.com

**Main Business Address**

1A-3974 Carson St  
Lansing, MI - 48911  
United States of America

**Additional Information**

Company Age	8 years
Number of Employees	1200
Annual Revenue	\$50,000,000
Defaulted Payment	No

**Service Onboarding Information**

Services Fee \$15,000

Services Requested

Corporate Credit Card

**Review Documents**

Review existing documents and mark them as pending if they need to be (re)uploaded.

Document Name	Document Status
Banking Information	Pending
Certificate of Incorporation	Verified
Primary Contact ID	Pending

Select the documents that you want to associate with this request

Automation Elite Inc.

Add

<input type="checkbox"/>	Name
<input type="checkbox"/>	Banking Information - Automation Elite Inc.pdf
<input type="checkbox"/>	June Marie - Driver's License.png
<input type="checkbox"/>	Certificate of Incorporation - Automation Elite Inc.pdf

Items per page: 20 1-3 of 3 items

Back Submit Onboarding Request

\_5. Check the boxes for the two documents **Banking Information - Automation Elite Inc.pdf** and **June Marie - Driver's License.png** in the document list at the bottom to make these two documents part of the request when you submit the onboarding request.



## Automation Elite Inc.

### Primary Contact Details

June Marie Sample  
517-555-0000  
jmarie@example.com

### Main Business Address

1A-3974 Carson St  
Lansing, MI - 48911  
United States of America

### Additional Information

Company Age 8 years  
Number of Employees 1200  
Annual Revenue \$50,000,000  
Defaulted Payment No

### Service Onboarding Information

Services Fee \$15,000  
Services Requested  
Corporate Credit Card

## Review Documents

Review existing documents and mark them as pending if they need to be (re)uploaded.

Document Name	Document Status
Banking Information	Verified
Certificate of Incorporation	Not Required
Primary Contact ID	Verified

Select the documents that you want to associate with this request

Automation Elite Inc.	Add
<input type="checkbox"/> Name	
<input checked="" type="checkbox"/> Banking Information - Automation Elite Inc.pdf	
<input checked="" type="checkbox"/> June Marie - Driver's License.png	
<input type="checkbox"/> Certificate of Incorporation - Automation Elite Inc.pdf	
Items per page: 20	1-3 of 3 items

[Back](#) [Submit Onboarding Request](#)

\_6. Click **Submit Onboarding Request** to complete Automation Elite Inc.'s request and navigate to the final confirmation page.

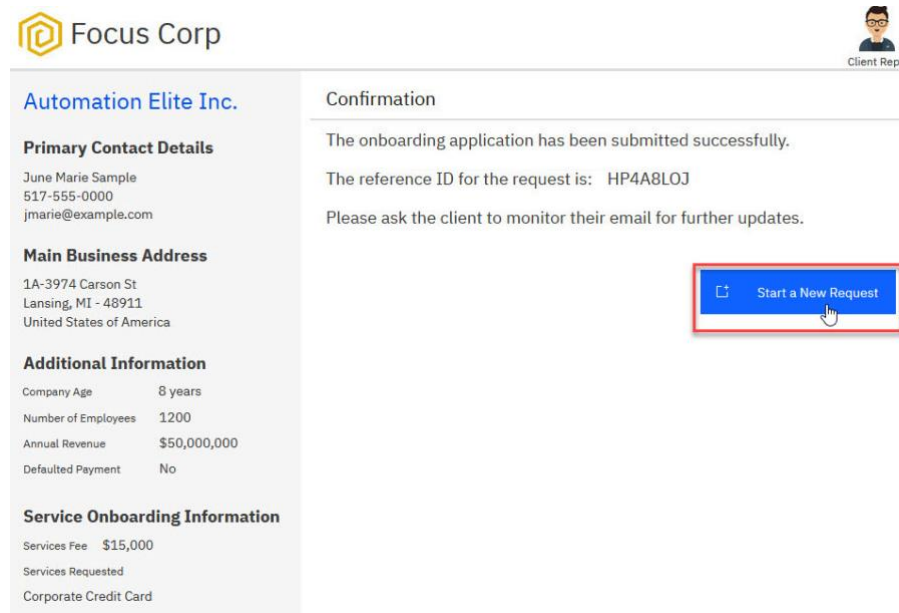
The submission may take a few seconds during which you might notice a little spinner icon next to the Client Rep icon. Please wait until you are taken to the third page.



## 4.2.3 Onboarding request confirmation page

### \_1. Explore the third page of the Client Onboarding app.

The left pane again lists all information provided on the first page. The right-hand side provides a reference ID for the request that the client rep can share with the client and a comment that an email was sent to the client about their request.



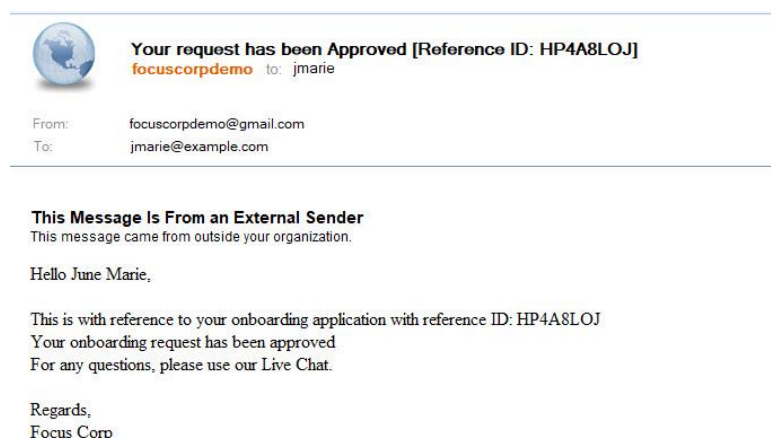
The screenshot shows the 'Confirmation' page of the Client Onboarding app. On the left, under 'Automation Elite Inc.', there are sections for 'Primary Contact Details' (June Marie Sample, 517-555-0000, jmarie@example.com), 'Main Business Address' (1A-3974 Carson St, Lansing, MI - 48911, United States of America), 'Additional Information' (Company Age: 8 years, Number of Employees: 1200, Annual Revenue: \$50,000,000, Defaulted Payment: No), and 'Service Onboarding Information' (Services Fee: \$15,000, Services Requested: Corporate Credit Card). On the right, the 'Confirmation' section states: 'The onboarding application has been submitted successfully.', 'The reference ID for the request is: HP4A8LOJ', and 'Please ask the client to monitor their email for further updates.' A blue button labeled 'Start a New Request' is highlighted with a red box and a cursor icon.

### \_2. Click on **Start a New Request** to get back to the first page to be able to continue onboarding the more clients.

## 4.2.4 Checking the automatic email to Automation Elite Inc.

### \_1. Open your **email client** in case you have provided an email address on the first page that you can access.

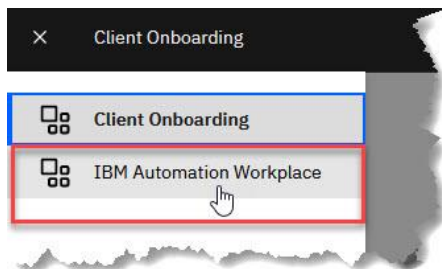
### \_2. Check your inbox for an email from **focuscorpdemo**



The email contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request has been approved.

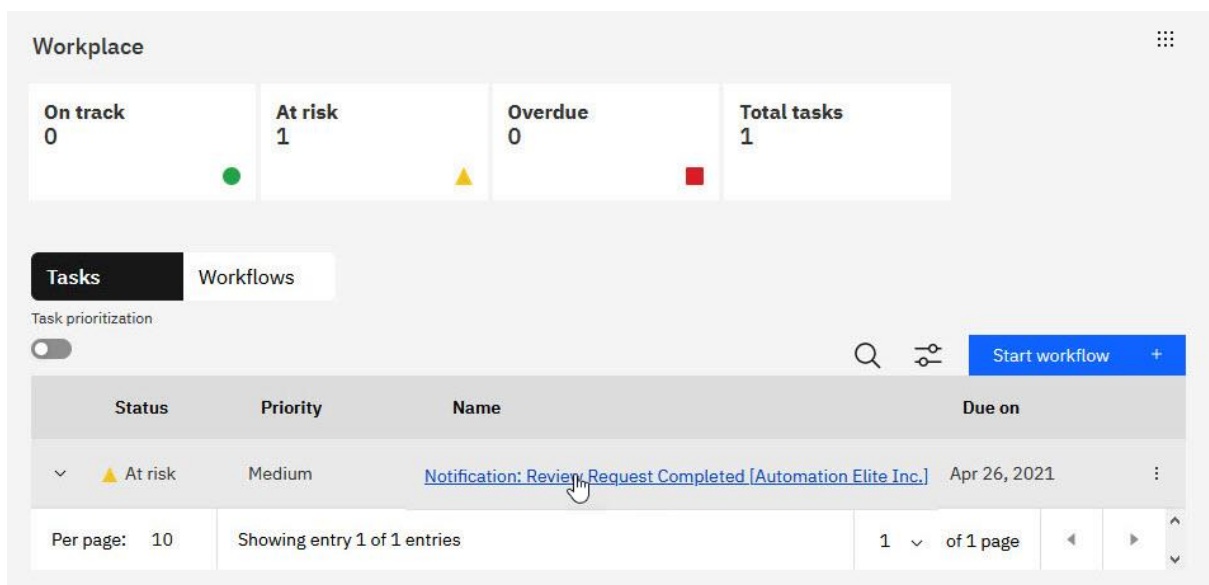
## 4.2.5 Checking the Client Rep notification about automated onboarding

- \_1. **Switch** back from the email client to the browser window containing the **Client Onboarding app**.
- \_2. **Click** on the **hamburger menu icon** in the top left corner and **select IBM Automation Workplace** to switch from the Client Onboarding app to your general workplace. After a short moment it shows the tasks available to you.



When you complete a task, the task may still be shown for some seconds in the task list. It will disappear when the task list auto-refreshes itself.

- \_3. **Open** the **task** that is available to you as client rep by **clicking on it**.



Depending on the network latency it may take a moment until the task page is loaded.

- \_4. **Explore** the task page.

At the top (1) the four stages of the request processing are shown. This task is part of the last stage (Notification). The other stages have been processed automatically. In this stage you as the client representative are informed about the outcome of the onboarding request. The first panel on the left (2) provides a summary of the request, mainly the Client Name, the Approval Status, and the Reference ID generated when you submitted the request in the app. The panel below (3) contains comments related to the request, in this case letting you know that the client was already informed via email about the approval. These comments are automatically added by the system. Therefore, an administrative user ID (cp4badmin) is shown as the originator. The main panel on the right (4) has four tabs. On the Details tab the scoreboard is shown that contains the segmentation, Automation Elite Inc. belonging to the Segment 1 clients, the risk assessment, here Low Risk, and the Confidence for the risk assessment, here with 97% being very high (the actual values may differ slightly in your onboarding request).

Workplace / Notification - Review Request Completed [Automation Elite Inc.]  
 ▲ Medium priority | Due on Apr 26, 2021, 11:49 AM

Focus Corp

Client Rep

Stages 1

Document Review Scoreboarding Backend Systems Update Notification

**Summary**

Client Name Automation Elite Inc.  
 Approval Status Approved  
 Reference ID HP4A8LOJ  
 Created on Apr 26, 2021, 10:49 AM  
 Status Active

**Comments** Add comment

cp4badmin  
 The review for the onboarding request is now complete and the client has been notified of the approval status.  
 Apr 26, 2021, 10:49 AM

cp4badmin  
 All required documents have been verified.  
 Apr 26, 2021, 10:49 AM

**Details** Documents Activities History

**Scoreboard**

Segment  
 Segment 1 Low Risk

Confidence  
 97%

Onboarding Information

Complete Onboarding Request

5. **Explore** the Documents, Activities, and History tabs.

The **Documents** tab shows all documents that you had previously selected on the Review Documents page of the Client Onboarding app. They have been made part of the actual onboarding request.

Details	Documents	Activities	History
	Banking Information - Automation Elite Inc.pdf	cp4badmin	2021/04/26 10:49
	June Marie - Driver's License.png	cp4badmin	2021/04/26 10:49

The **Activities** tab shows the status and type of all activities of the request. Since this is a case in the Workflow system, any discretionary activities defined in the case would be available here so that they can be started by the client representative.

Details	Documents	Activities	History
---------	-----------	------------	---------

Name	Status	Type
Notification	▲ Started on Apr 26, 2021, 10:49 AM	Required
Initialize Request	✓ Completed on Apr 26, 2021, 10:49 AM	Required
Perform Scoreboarding	✓ Completed on Apr 26, 2021, 10:49 AM	Required
Update Backend Systems	✓ Completed on Apr 26, 2021, 10:49 AM	Required
Review Client Documents	⌚ Waiting...	Optional

Per page: 5    Showing 1 to 5 of 5 entries    1 of 1 page

The **History** tab shows information about different types of events that happened for the request.

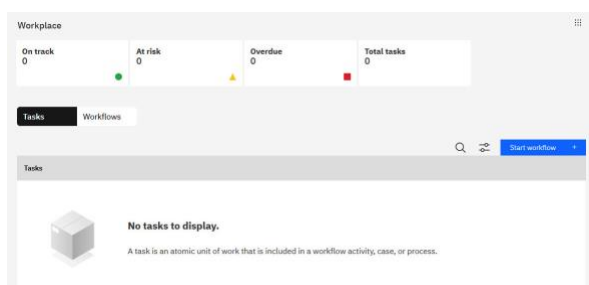
Details	Documents	Activities	History
---------	-----------	------------	---------

Name	Details	User	Last modified on
The review for the onboarding request is now complete and the client has been notified of the approval status.	Comment added to case	cp4badmin	Apr 26, 2021, 10:49 AM
Update Backend Systems	Activities Completed	cp4badmin	Apr 26, 2021, 10:49 AM
Notification	Activities Started	cp4badmin	Apr 26, 2021, 10:49 AM
Notification	Activities Ready	cp4badmin	Apr 26, 2021, 10:49 AM
Perform Scoreboarding	Activities Completed	cp4badmin	Apr 26, 2021, 10:49 AM

Per page: 5    Showing 1 to 5 of 21 entries    1 of 5 pages

**\_6. Click Complete Onboarding Request (5)** to complete the task. This closes the task, brings you back to the now empty work list for the client rep and completes the fully automated onboarding for a low risk high confidence client like Automation Elite Inc.



This completes the part of the exercise where you actively perform steps.

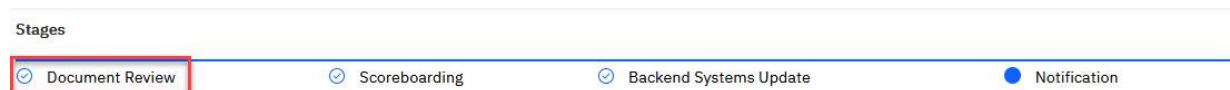


## 4.2.6 Review of Stages Performed Automatically

This section provides information on how different aspects that happen automatically as part of the Client Onboarding are performed. You will not actively need to perform any steps, just read them. In chapter three you will again work directly with the Client Onboarding solution.

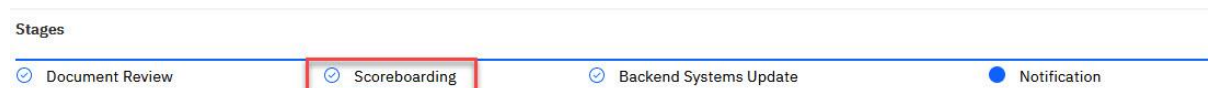
As part of the above fully automated client onboarding workflow you directly worked on the fourth stage of the request processing (Notification). The three request stages before that were already automatically completed and did not need manual activities.

### 4.2.6.1 Document Review



The first stage during processing the onboarding request is the Document Review stage. For the above request you have specified in the app that two documents are already verified and the third is not required. Therefore, this stage completes automatically.

### 4.2.6.2 Scoreboarding

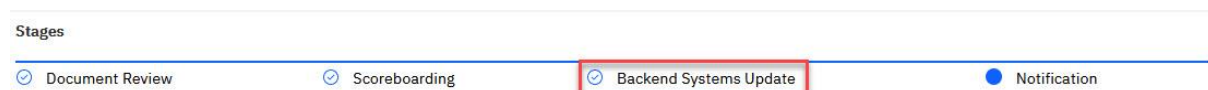


As described before, the Scoreboarding stage consists of two activities.

The first activity automatically applies prescriptive rules and AI models. It determines the segment this client belongs to, the risk associated with onboarding the client and the confidence of the assessment. The second activity is to manually review the onboarding request. However, in the request you created the calculated confidence of the assessment is above 75%. Therefore, the second activity to manually review the request is skipped.

For your request the client has been automatically onboarded, and the Scoreboarding stage has been automatically completed.

### 4.2.6.3 Backend Systems Update



As part of the Backend Systems Update stage, Focus Corp needs to update some of its legacy systems of record:

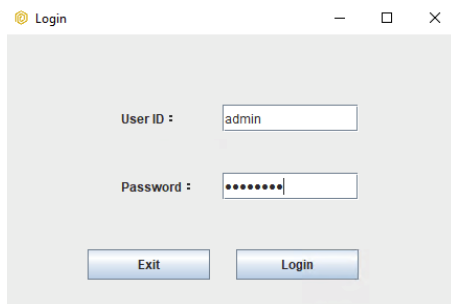
- The first is the Client Management System. It offers a Java rich client to add or update data.
- The second is the Service Management System. It offers a web interface to interact with it.

As Focus Corp strives for a high level of automation, they want to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply Robotic Process Automation (RPA).

The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates the following screenshots explain the steps performed.

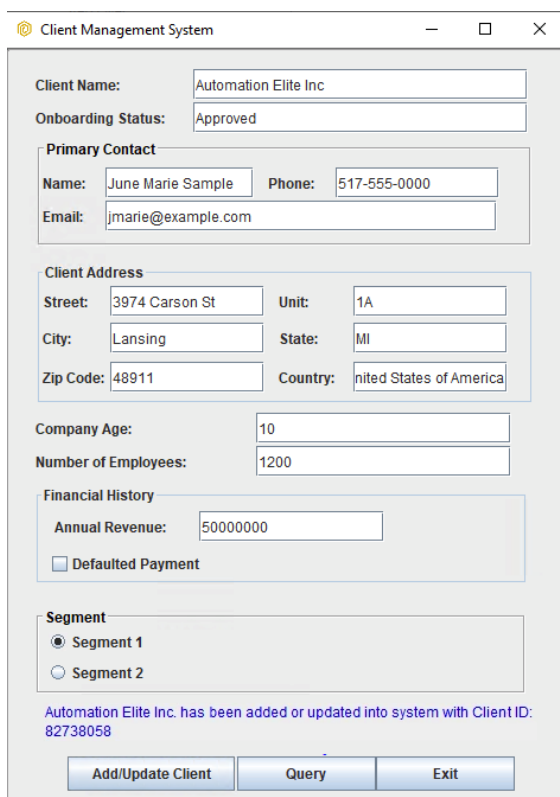
The first step is to create a client record or updating an existing client record in the Client Management System and to retrieve the Client ID for the client:

- The bot **starts** the **Client Management System** (with a Java UI) and **logs into it**.



The screenshot shows a 'Login' window with a title bar containing a yellow icon, the text 'Login', and standard window controls. The window has a light gray background. It contains two text input fields: 'User ID : admin' and 'Password : .....'. Below these fields are two buttons: 'Exit' and 'Login'.

- The bot enters all values from the Client Onboarding solution into the respective fields and clicks on the **Add/Update Client** button and retrieves the **Client ID** from the output text.



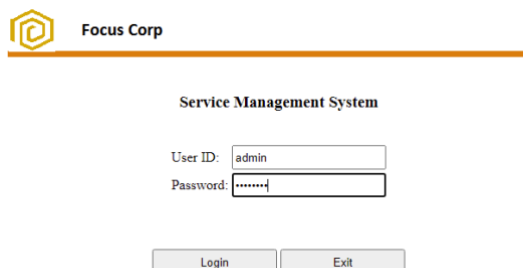
The screenshot shows the 'Client Management System' main window. It has a title bar with a yellow icon, the text 'Client Management System', and standard window controls. The window contains several sections of form fields: 'Client Name' (Automation Elite Inc), 'Onboarding Status' (Approved), 'Primary Contact' (Name: June Marie Sample, Phone: 517-555-0000, Email: jmarie@example.com), 'Client Address' (Street: 3974 Carson St, Unit: 1A, City: Lansing, State: MI, Zip Code: 48911, Country: nited States of America), 'Company Age' (10), 'Number of Employees' (1200), 'Financial History' (Annual Revenue: 50000000, Defaulted Payment checkbox), and 'Segment' (Segment 1 selected). At the bottom, there is a status message: 'Automation Elite Inc. has been added or updated into system with Client ID: 82738058'. Below the message are three buttons: 'Add/Update Client', 'Query', and 'Exit'.

- Finally, it **closes** the Client Management System by **clicking** on **Exit**.

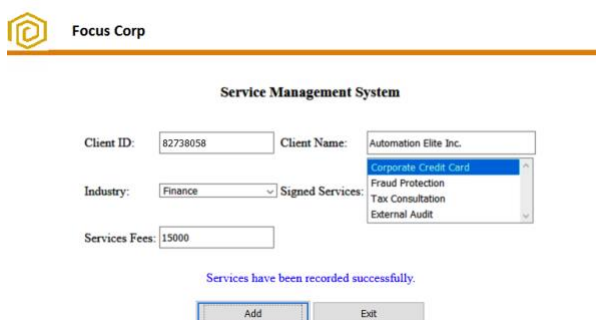


The second step is to record the services the client wants to onboard to in the Service Management System. As you have seen this only applies when the onboarding request has been accepted during the Scoreboarding stage.

- The bot **starts a browser**, **navigates** to the **home URL** for the **Service Management System**, and **logs into it** as well.



- The bot **enters** the **Client ID** retrieved from the Client Management System as well as the **client name, industry, services** to be signed up to, and **services fees** from the Client Onboarding solution into the respective fields and clicks **Add**.



- Finally, the bot **clicks Exit** to **logout** from the Service Management System and **closes** the **browser window**.

These two System of Records in our scenario are just mockups of potential real client systems. They represent systems that don't offer APIs at all to programmatically interact with them or where parts like updates are just exposed through the native UI and not an API. Such systems can easily be automated using the RPA capability.

This completes the lab to experience how IBM Cloud Pak for Business Automation can be used in a simplified version of a Client Onboarding solution as part of Focus Corp's service business.

### Congratulations on completing the lab!

We love to hear your **feedback**.

Depending on the venue, please provide feedback via the Slack channel, during the Webex calls, by sending an email to the authors ([Olaf.Hahn@de.ibm.com](mailto:Olaf.Hahn@de.ibm.com) / [aswapnil@ca.ibm.com](mailto:aswapnil@ca.ibm.com)), and through the survey at the end of the event.