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

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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.

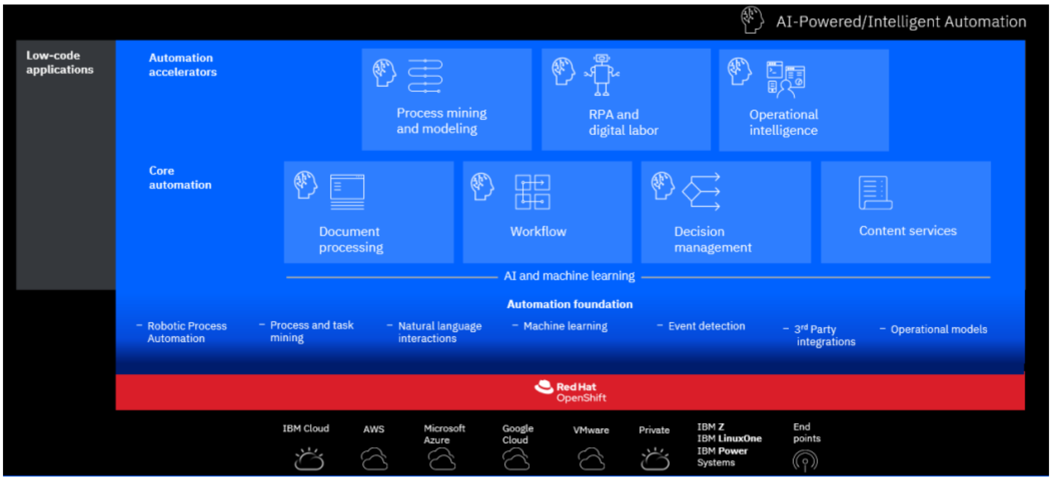


Figure 1: Marchitecture of the IBM Cloud Pak for Business Automation

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.

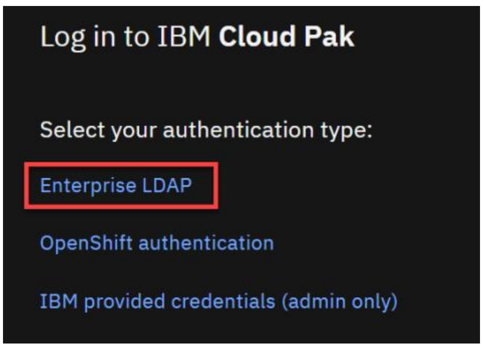
2.2 Exercise Instructions

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.

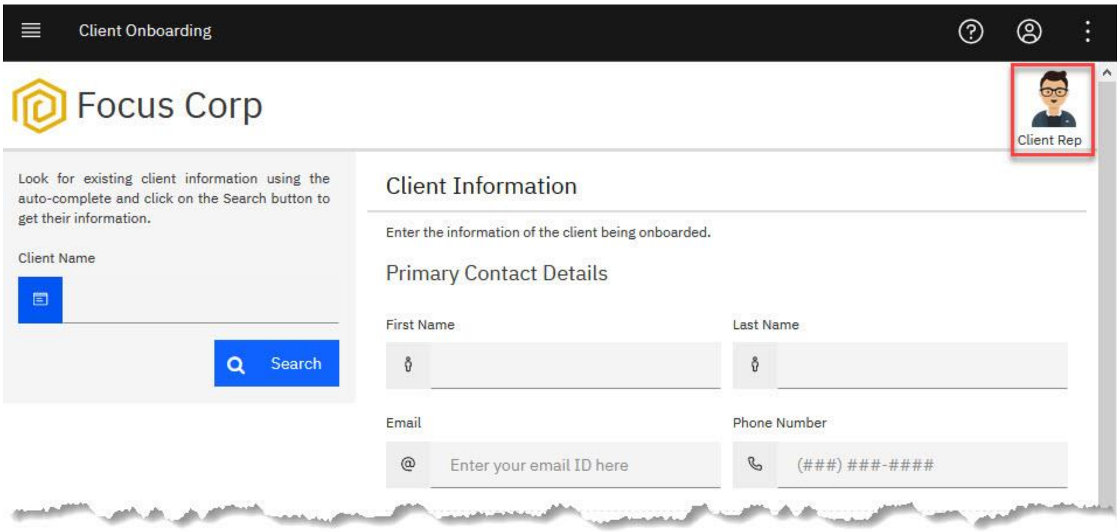
_2. **Select Enterprise LDAP** on the Log in to IBM Cloud Pak page



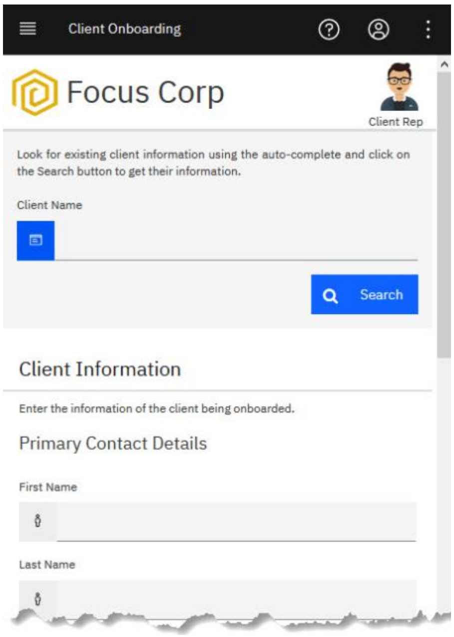
_3. **Login** with the username and password that has been assigned to you.

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

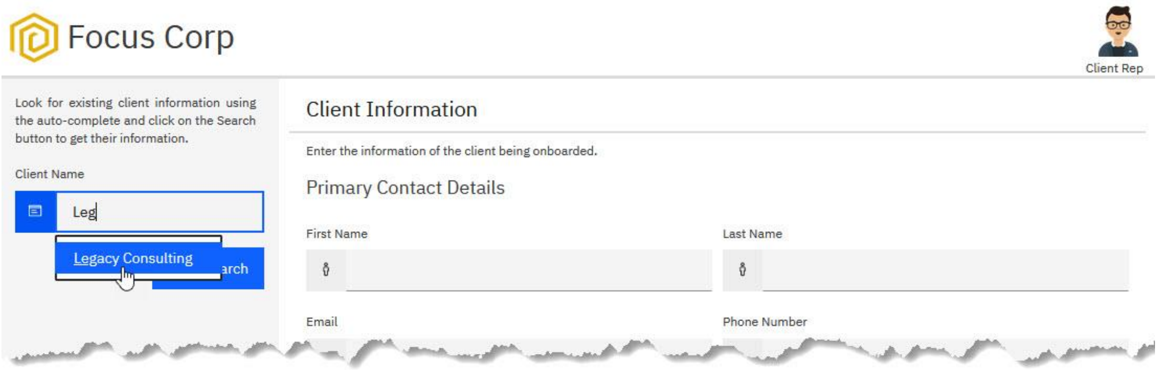
It provides means to search for an existing client by name, enter various information about the client, a selector for the industry for which Focus Corp offers services, a list of services the client can sign up for, and the ability to calculate the services fee based on the selection.



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.

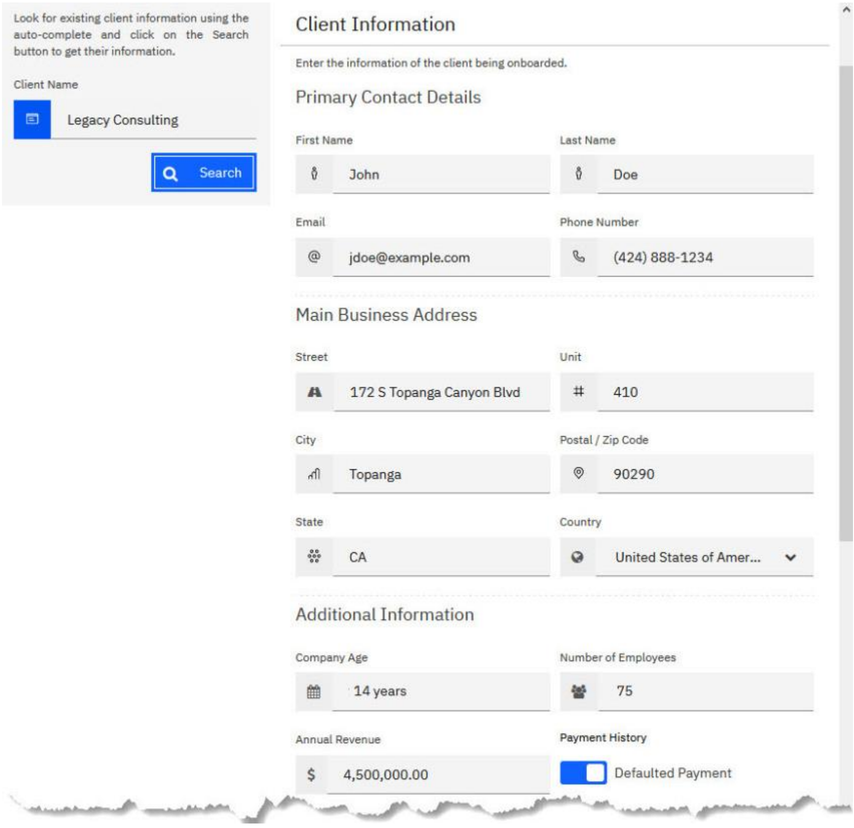


_5. **Type** ***Leg*** in the **Client Name** text field in the left panel to search for **Legacy Consulting** which is an existing client of Focus Corp.



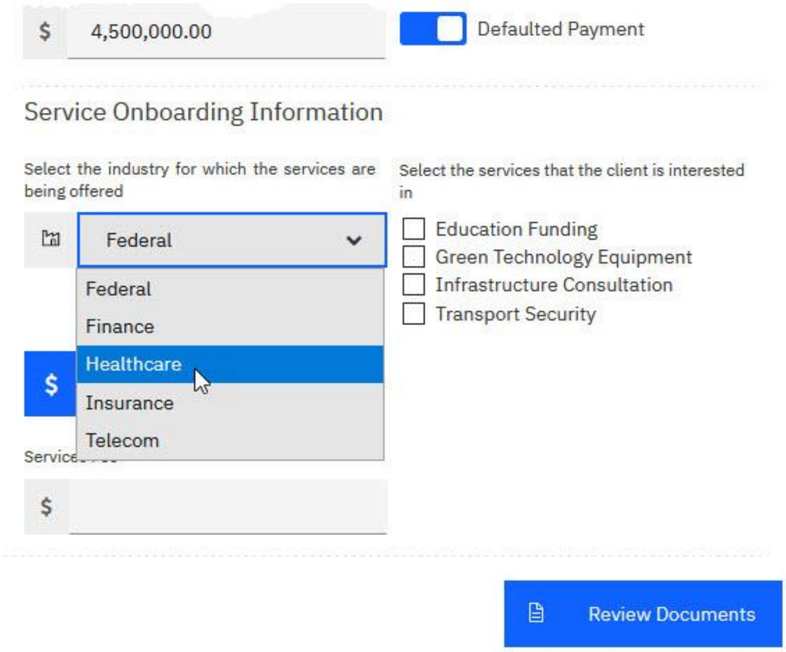
_6. **Click** on **Legacy Consulting** once the type ahead feature offers it.

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

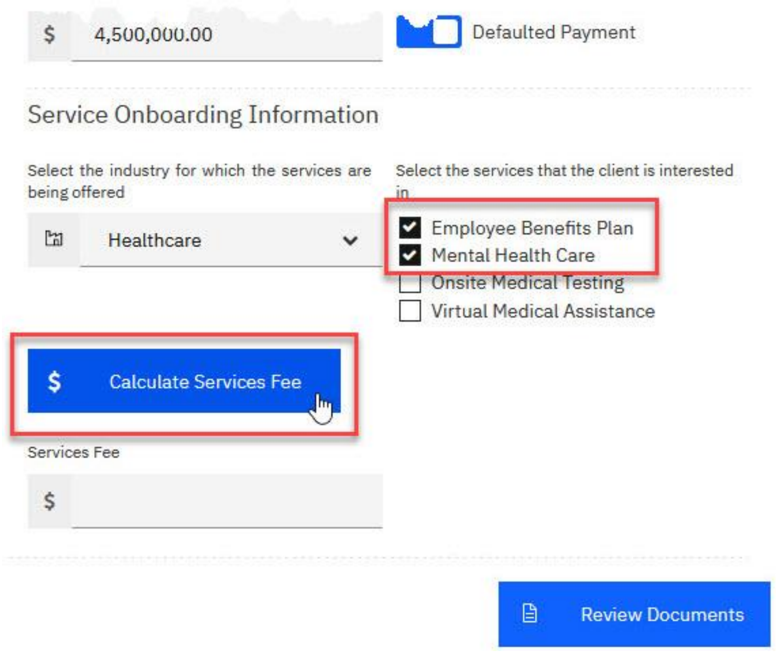


_8. **Optionally, replace** the **email address** jdoe@example.com with an email address of your choice that you can use to receive client emails associated with the scenario.

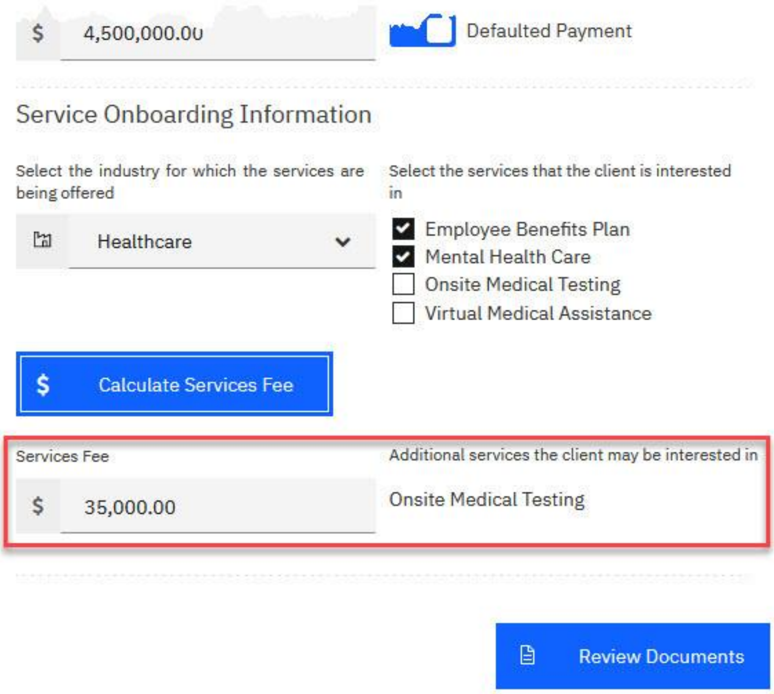
_9. **Select Healthcare** in the **Industry** drop-down list as Legacy Consulting requests to onboard to two services in that domain.



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

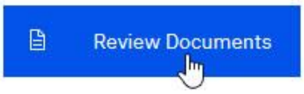


_11. **Click Calculate Services Fee** to calculate the fees and get upsell recommendations.



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.

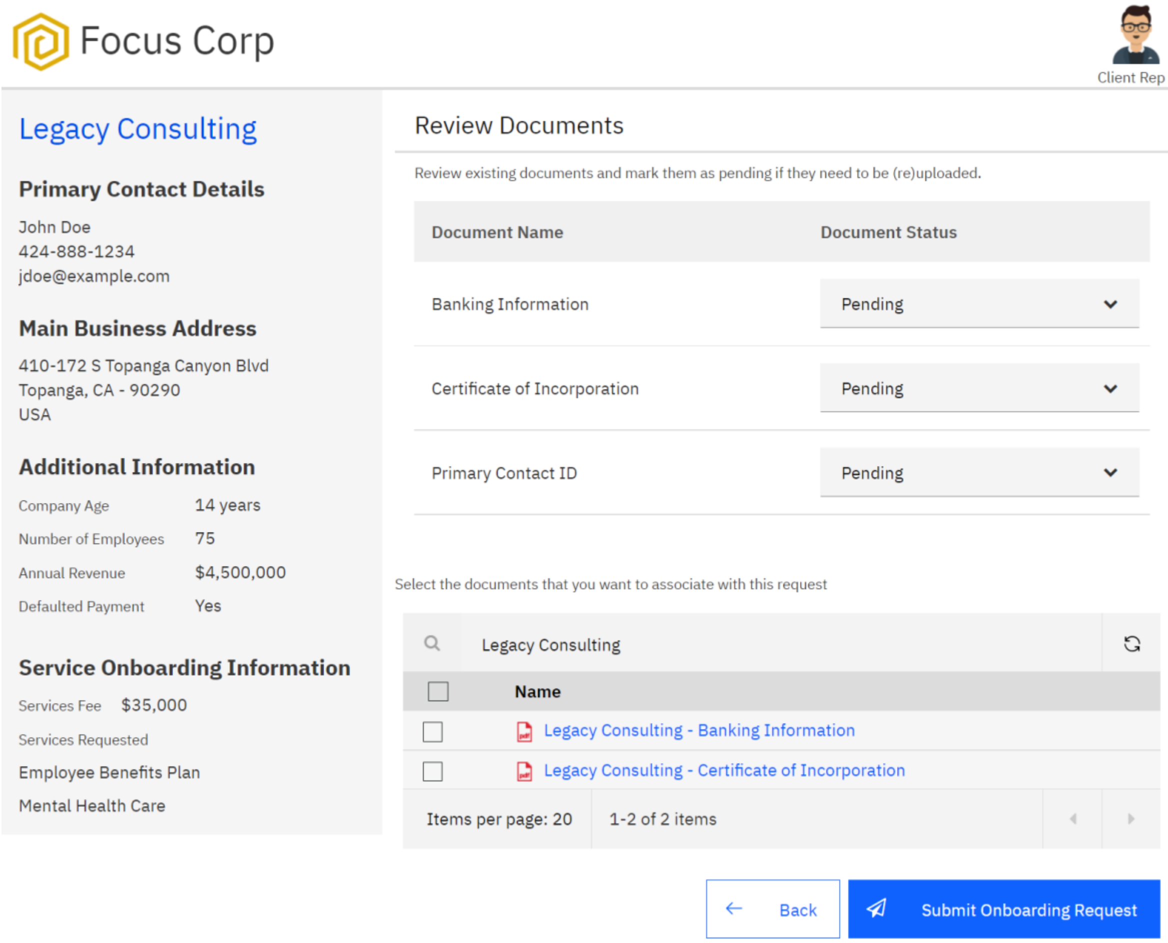
_12. **Click Review Documents** to navigate to the next page.



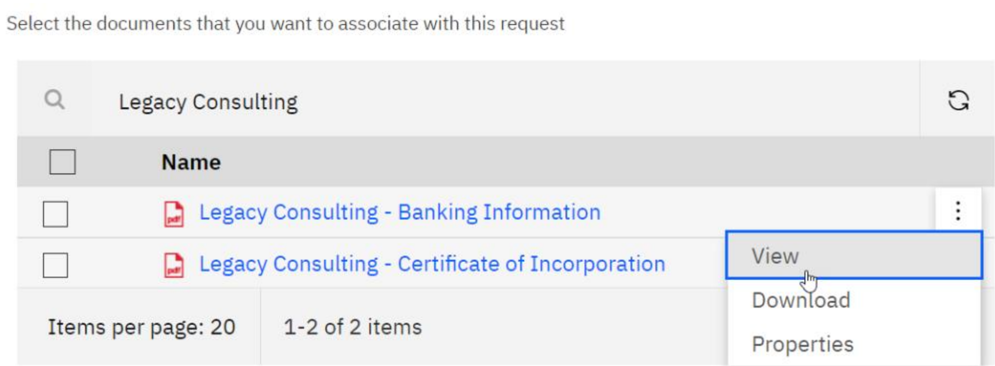
2.2.2 Verifying required documents and submitting the onboarding request

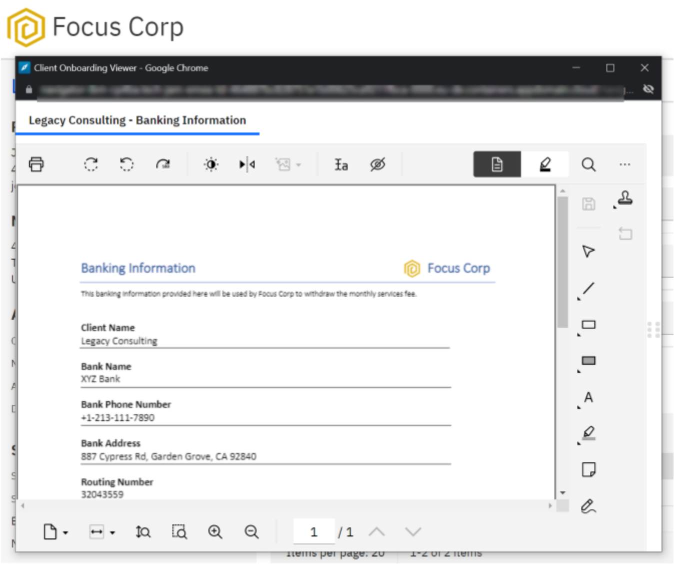
_1. **Explore** the second page of the Client Onboarding app.

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.



_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.



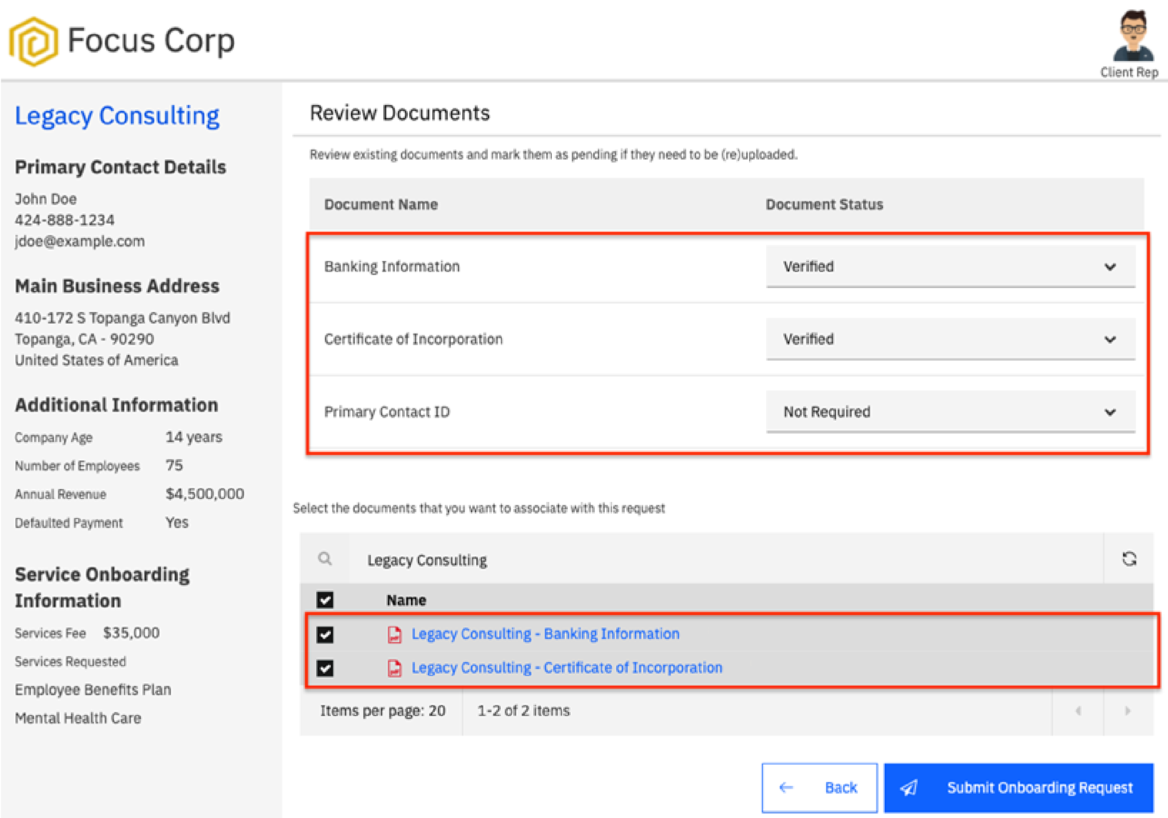


_3. Select Verified for Banking Information and Certificate of Incorporation.

_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.



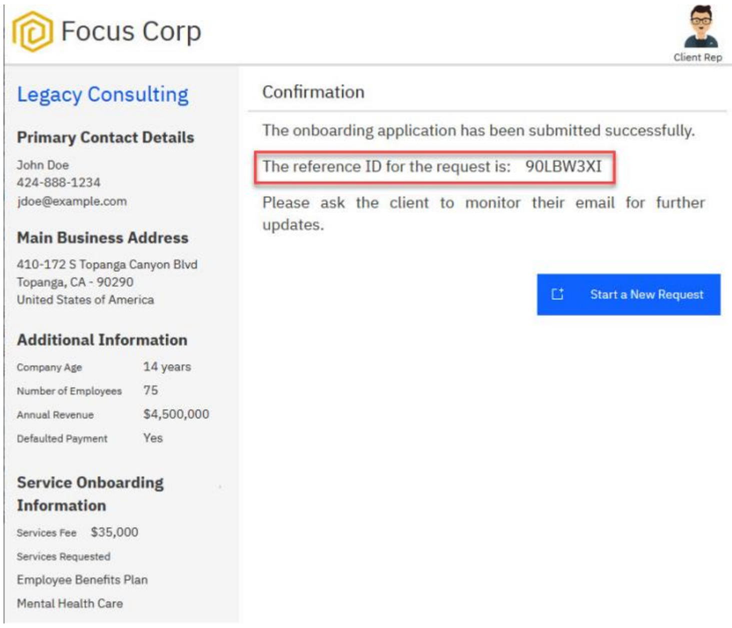
_6. **Click Submit Onboarding Request** to complete Legacy Consulting's request and navigate to the final confirmation page.

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.

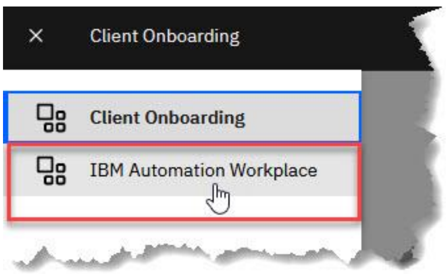
The left pane again lists all information provided on the first page. The right-hand side provides a reference ID for the request that the client rep can share with the client and a comment that an email was sent to the client about their request.



_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

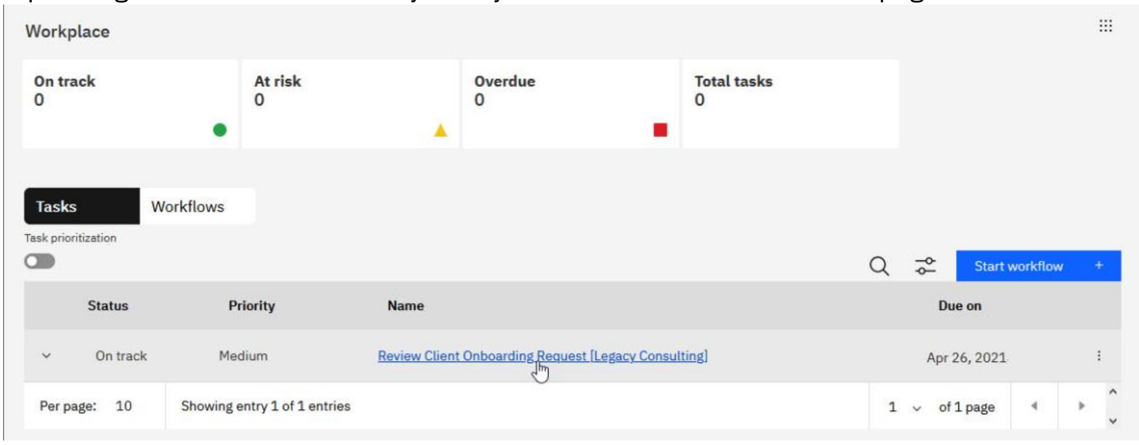
_1. **Click** on the **hamburger menu icon** in the top left corner and **select IBM Automation Workplace** to switch from the Client Onboarding app to your general workplace. After a short moment it shows the tasks available to you.



> 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.

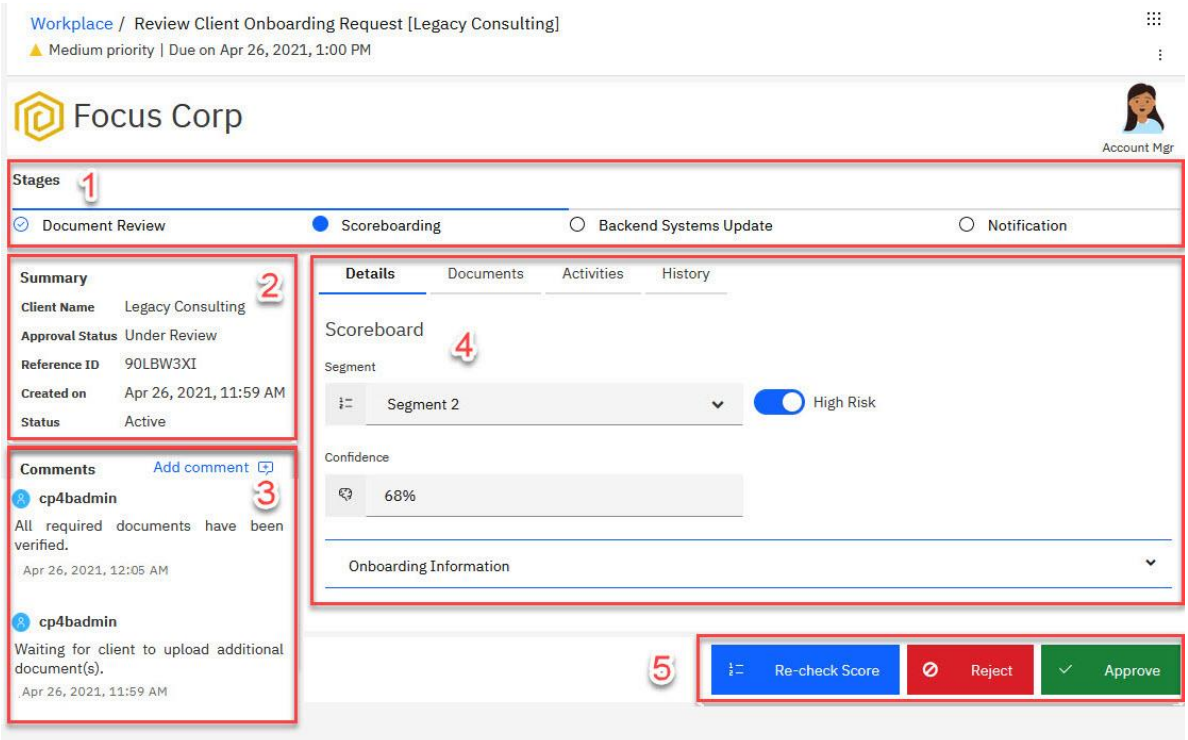
_1. **Open** the **task** that is available to you by **clicking on it**.

> 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.

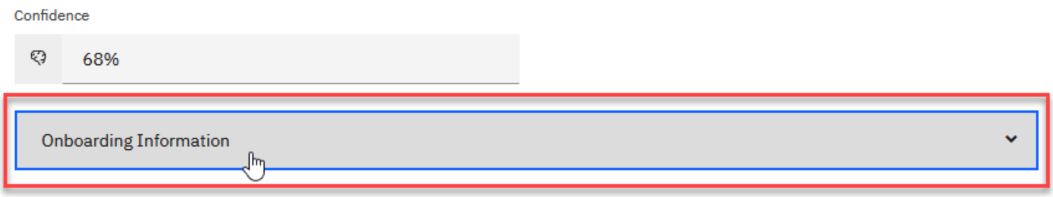


_2. **Explore** the task page.

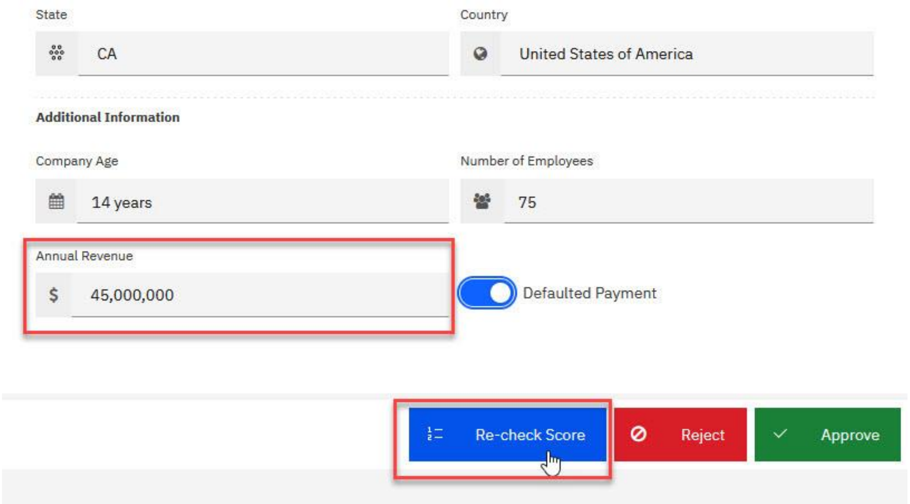
The icon in the top right signifies that you are performing this task as an Account Manager. At the top (1) the four stages of the request processing are shown. This task is part of the scoreboarding stage where you as the account manager have to manually assess those onboarding requests that have a 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).



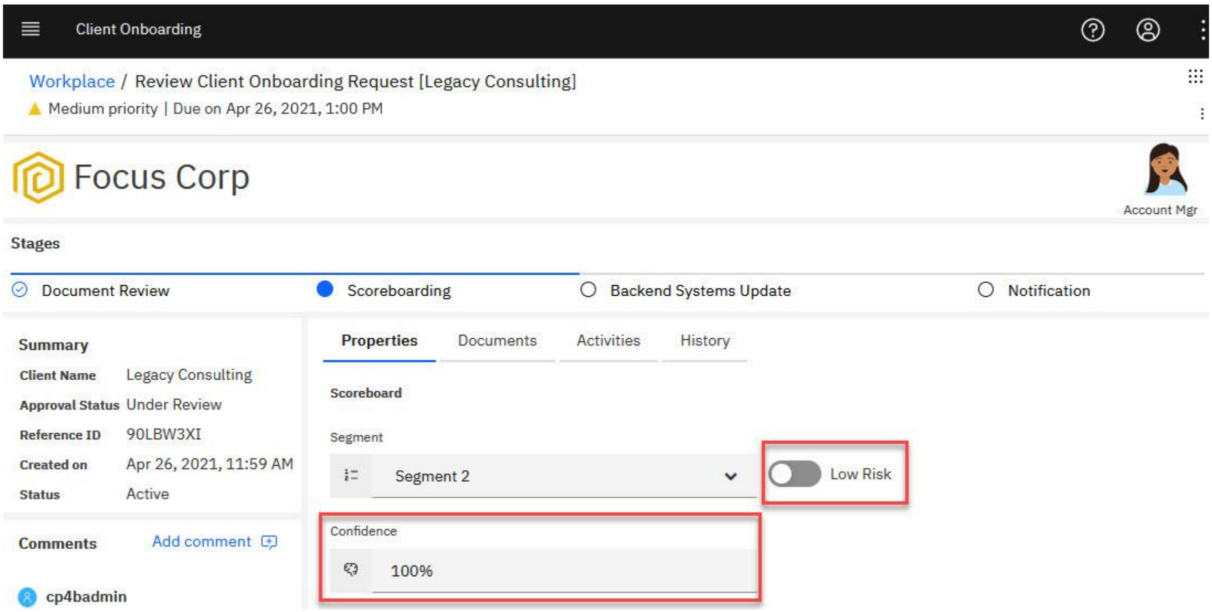
_3. **Expand** the **Onboarding Information** section by clicking on the section header.



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



_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%.



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

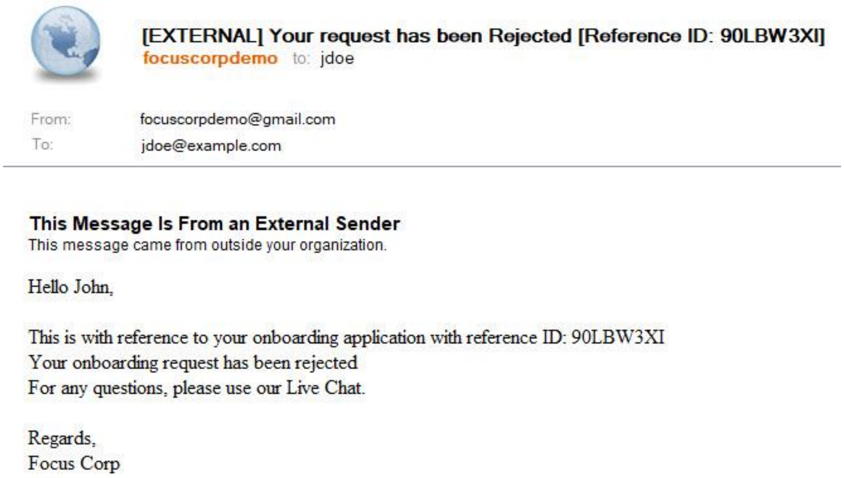
_7. **Click Reject** (5) to reject the onboarding request by Legacy Consulting as you the account manager consider the risk to be too high.

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**



[EXTERNAL] Your request has been Rejected [Reference ID: 90LBW3XI]
focuscorpdemo to: jdoe

From: focuscorpdemo@gmail.com
To: jdoe@example.com

This Message Is From an External Sender
This message came from outside your organization.

Hello John,

This is with reference to your onboarding application with reference ID: 90LBW3XI
Your onboarding request has been rejected
For any questions, please use our Live Chat.

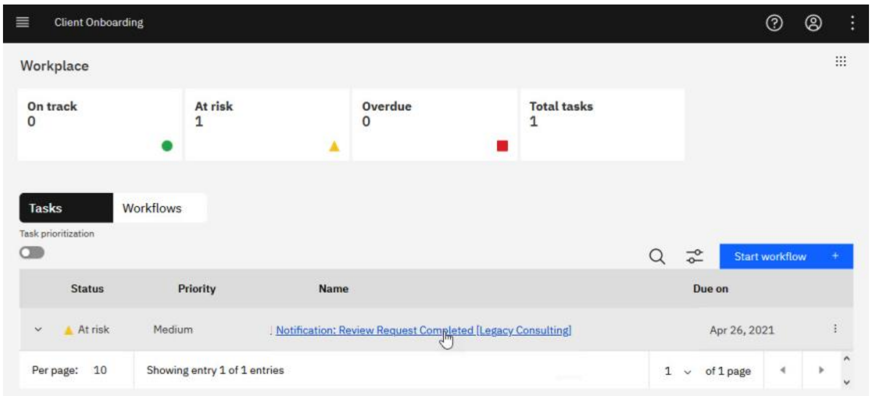
Regards,
Focus Corp

_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.

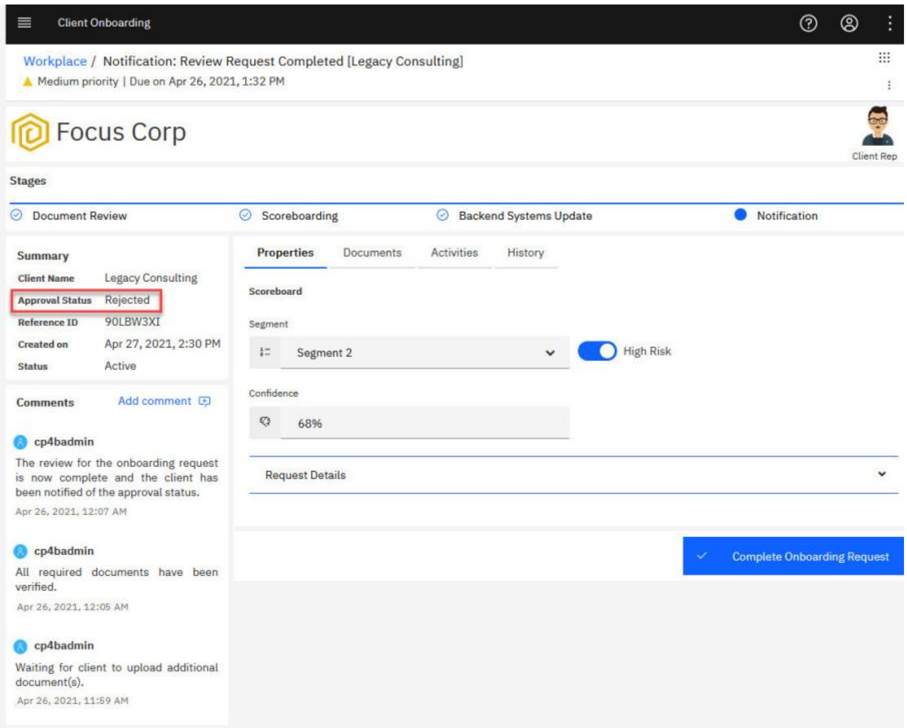
2.2.6 Checking the Client Rep notification about rejected onboarding

_1. **Switch** back from the email client to the browser window containing the **Client Onboarding app**.

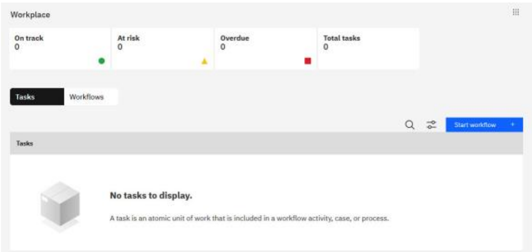
_2. **Open** the **task** that is available to you as client representative by **clicking on it**.



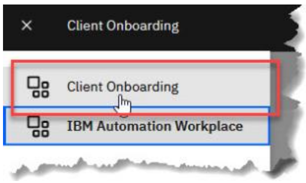
_3. **Observe** the **Approval Status** task page that shows that the client onboarding request was **rejected**.



_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.



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



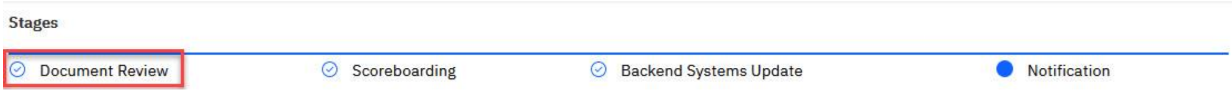
This completes the part of the exercise where you actively perform steps.

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.

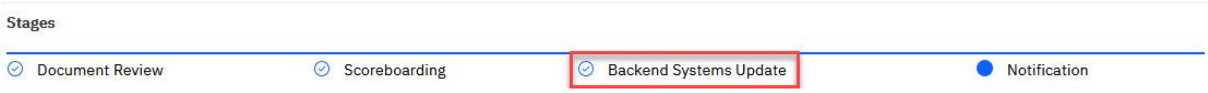
As part of the above client onboarding workflow, you worked on the second (Scoreboarding) and fourth (Notification) stage of the request processing. The first (Document Review) and the third (Backend Systems Update) stages were automatically completed, and no manual activities needed to be performed.

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:

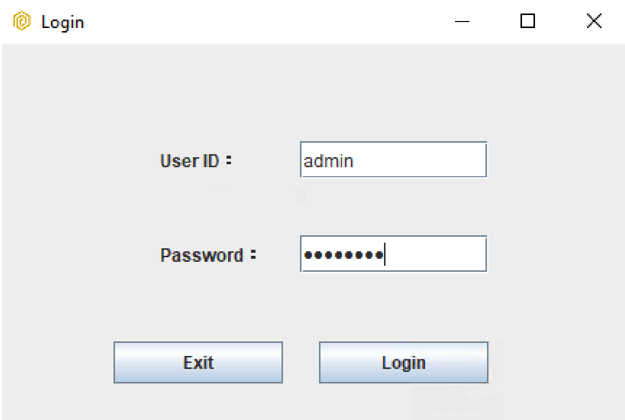
- The first is the Client Management System. It offers a Java rich client to add or update data.
- The second is the Service Management System. It offers a web interface to interact with it.

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).

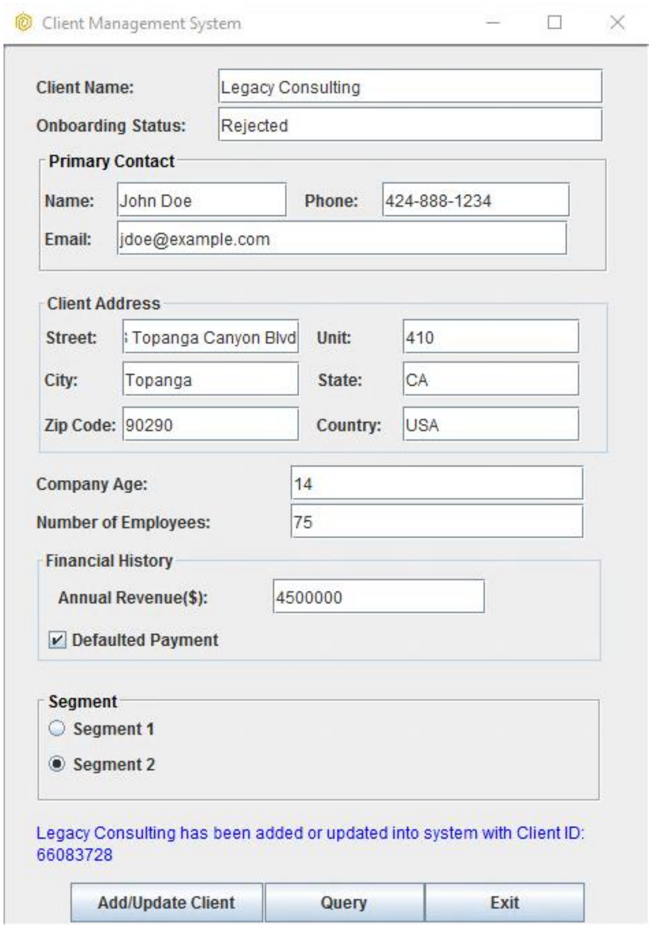
The execution of the RPA bot happens automatically in the background. To get an impression how the bot operates the following screenshots explain the steps performed.

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.



- 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.

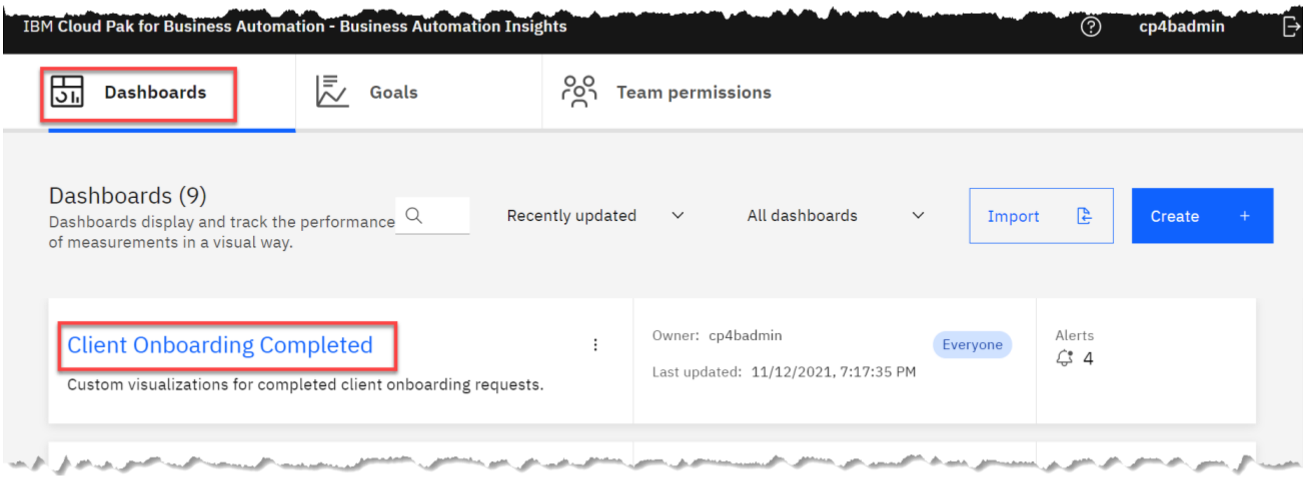
For this purpose, you will make use of **Business Performance Center** (BPC) as part of **IBM Business Automation Insights** (BAI). BPC provides easy to use and meaningful dashboards to visualize business relevant KPIs for lines of business users to have a near real-time view on their business operations.

3.2 Exercise Instructions

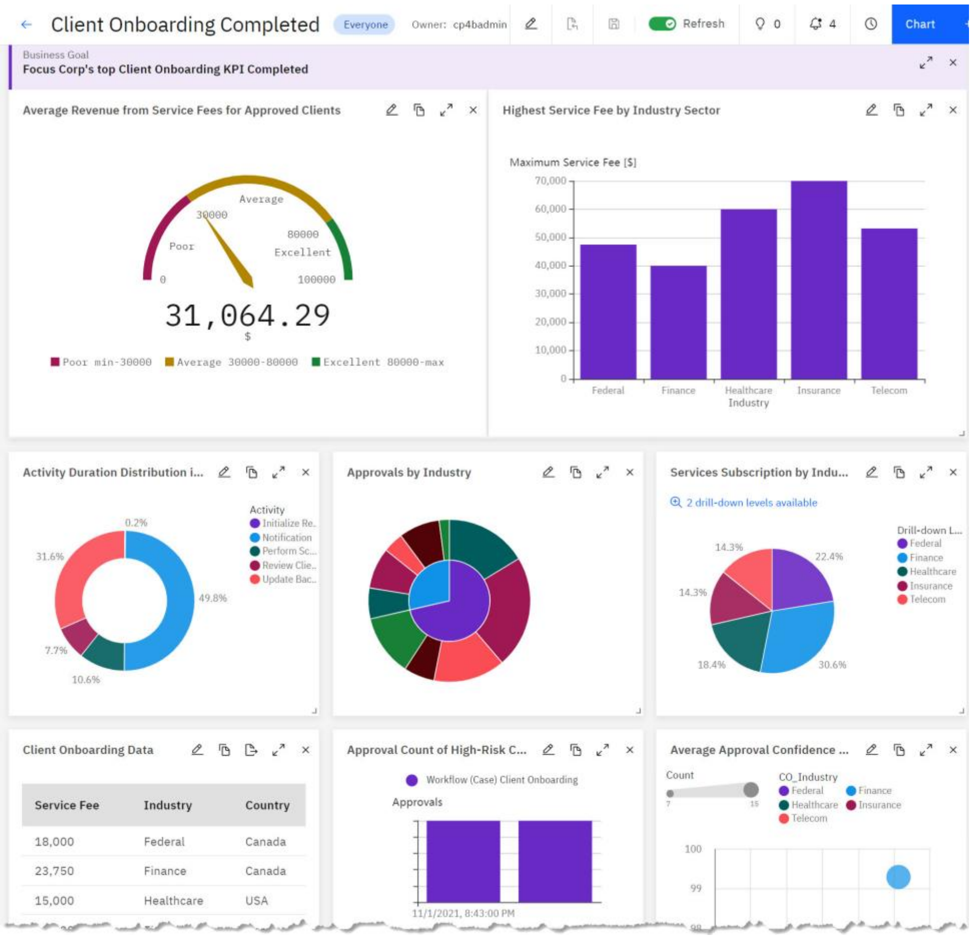
You continue to use the same user to access the BPC dashboard. You will see live data, so it may differ from the screenshot shown and may change over time as you are other participants perform onboarding requests.

_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.

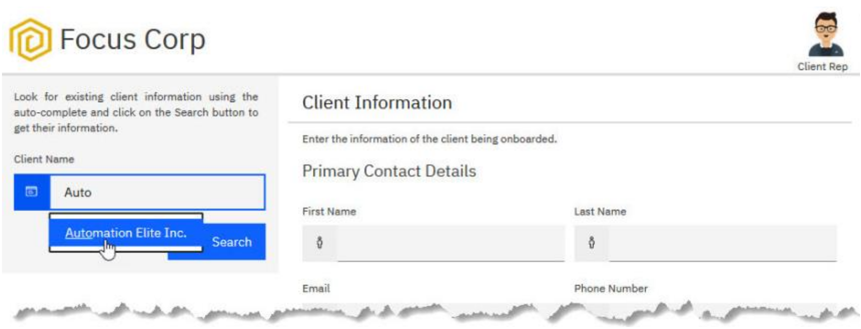
To remind you which role you currently perform, most screens show a Client Rep icon and label in the top right corner.

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

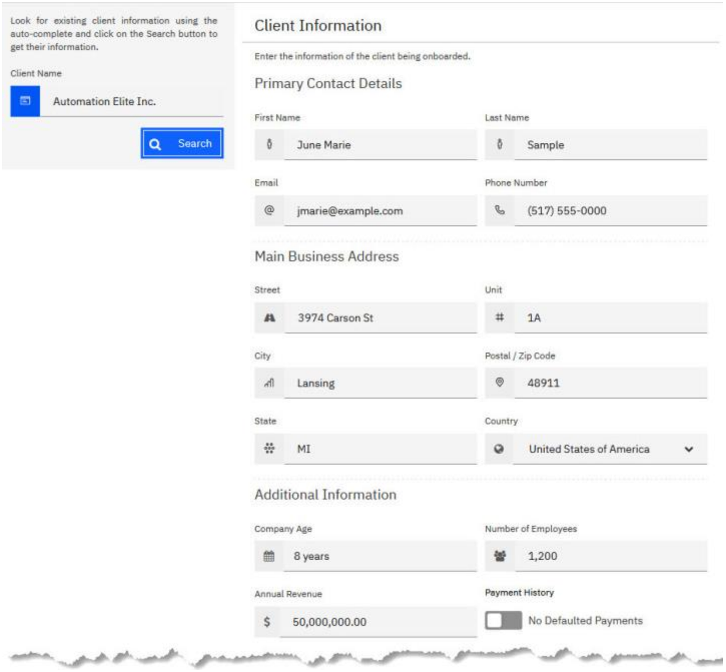
_1. Navigate back to the Client Onboarding Desktop.

_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.



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

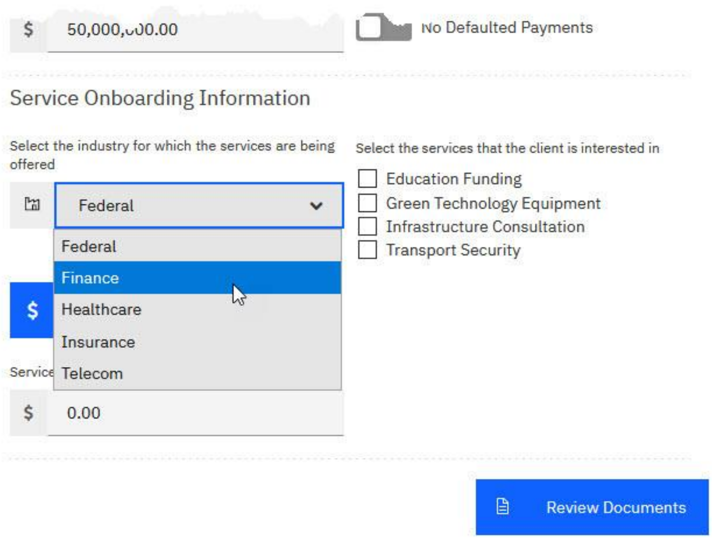
_4. **Click** on **Search** to load the details for the client into the panel on the right. It retrieves the client details using integration with the Workflow capability.



_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.

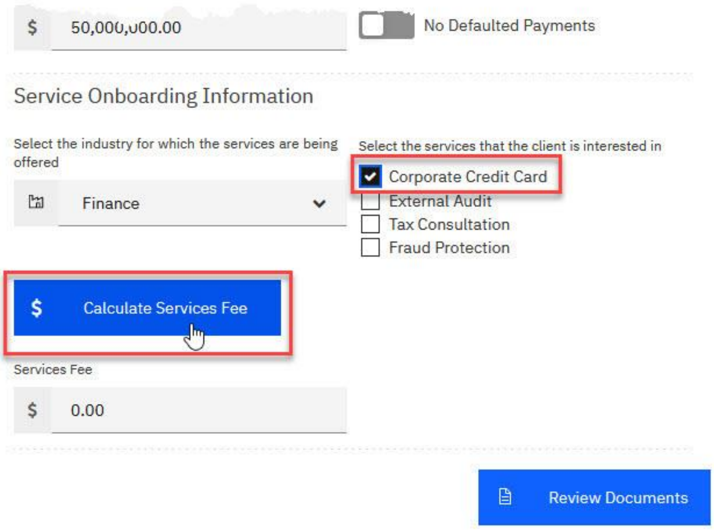
_6. **Select Finance** in the **Industry** drop-down list as Automation Elite Inc. requests to onboard to one service in that domain.

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

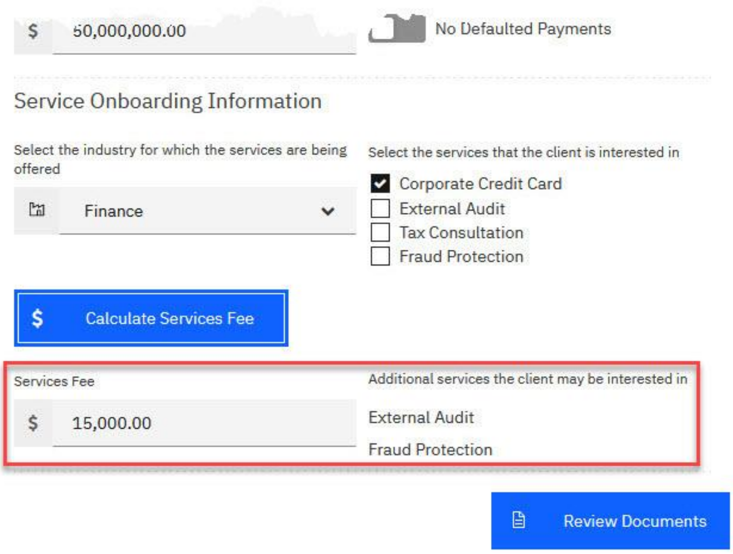


_7. **Check Corporate Credit Card** as the service that Automation Elite Inc. wants to onboard to**.**

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



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.

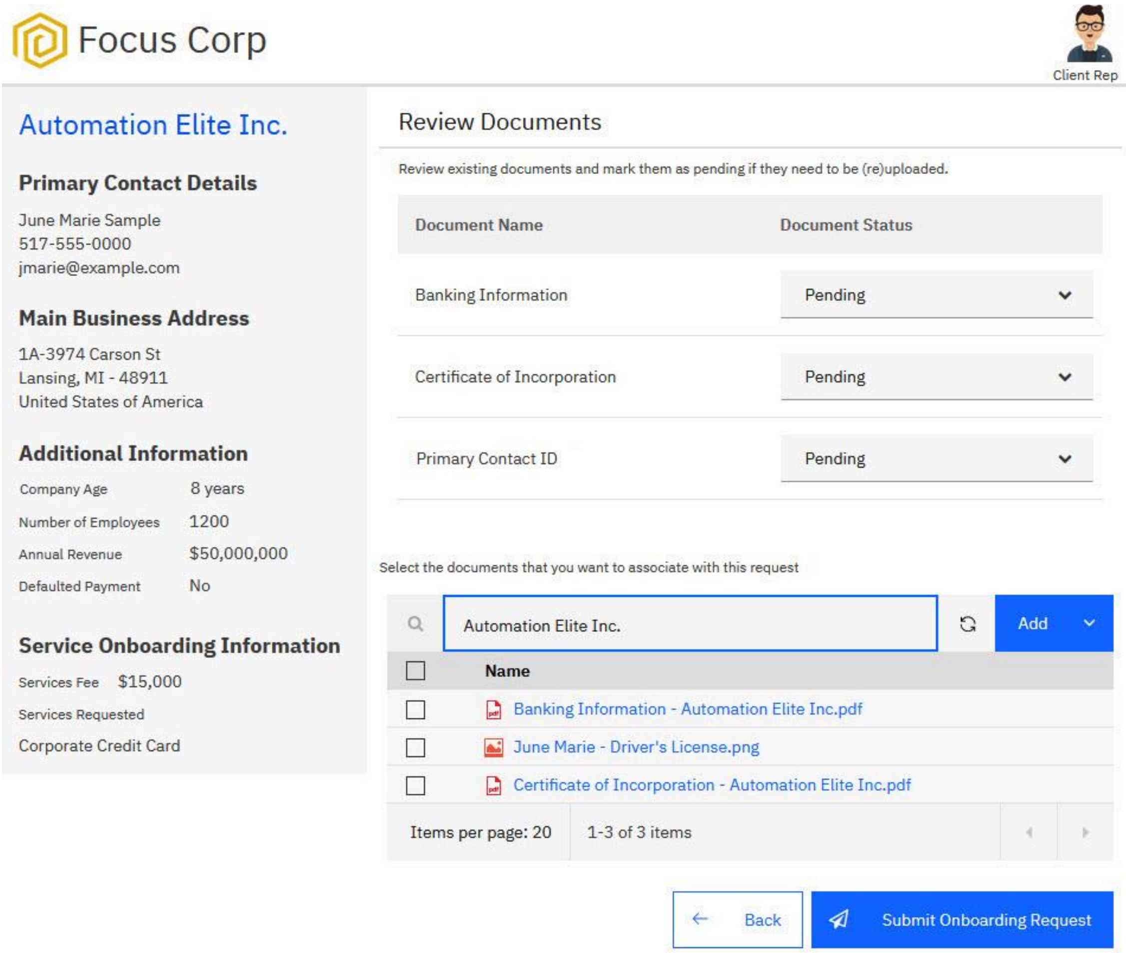


_9. **Click Review Documents** to navigate to the next page.

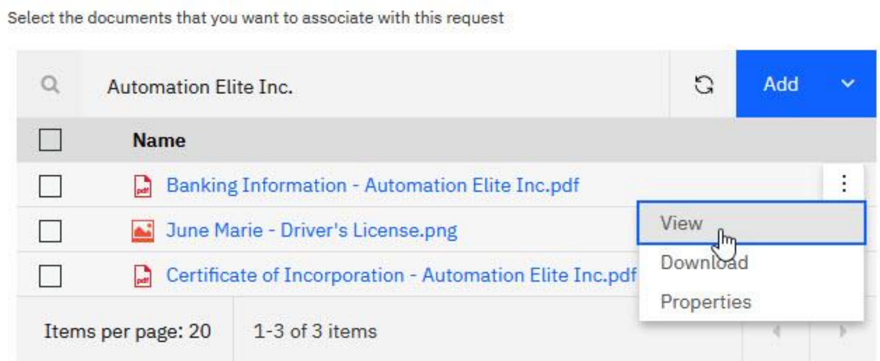
4.2.2 Verifying required documents and submitting the onboarding request

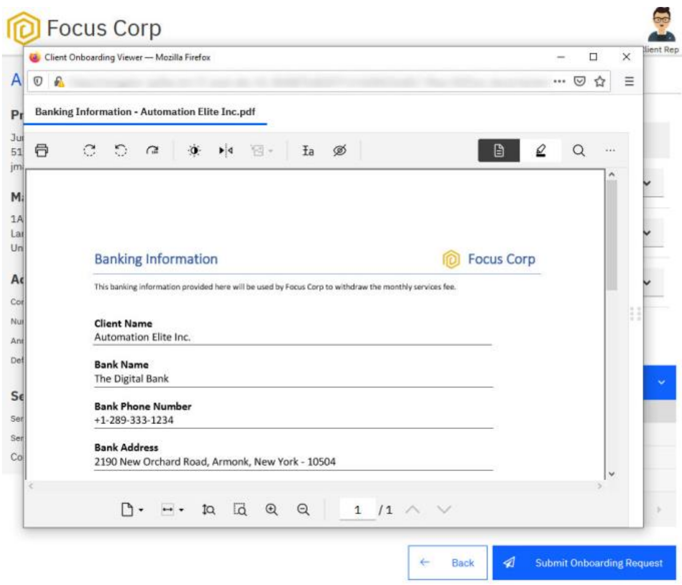
_1. **Explore** the second page of the Client Onboarding app.

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.



_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.

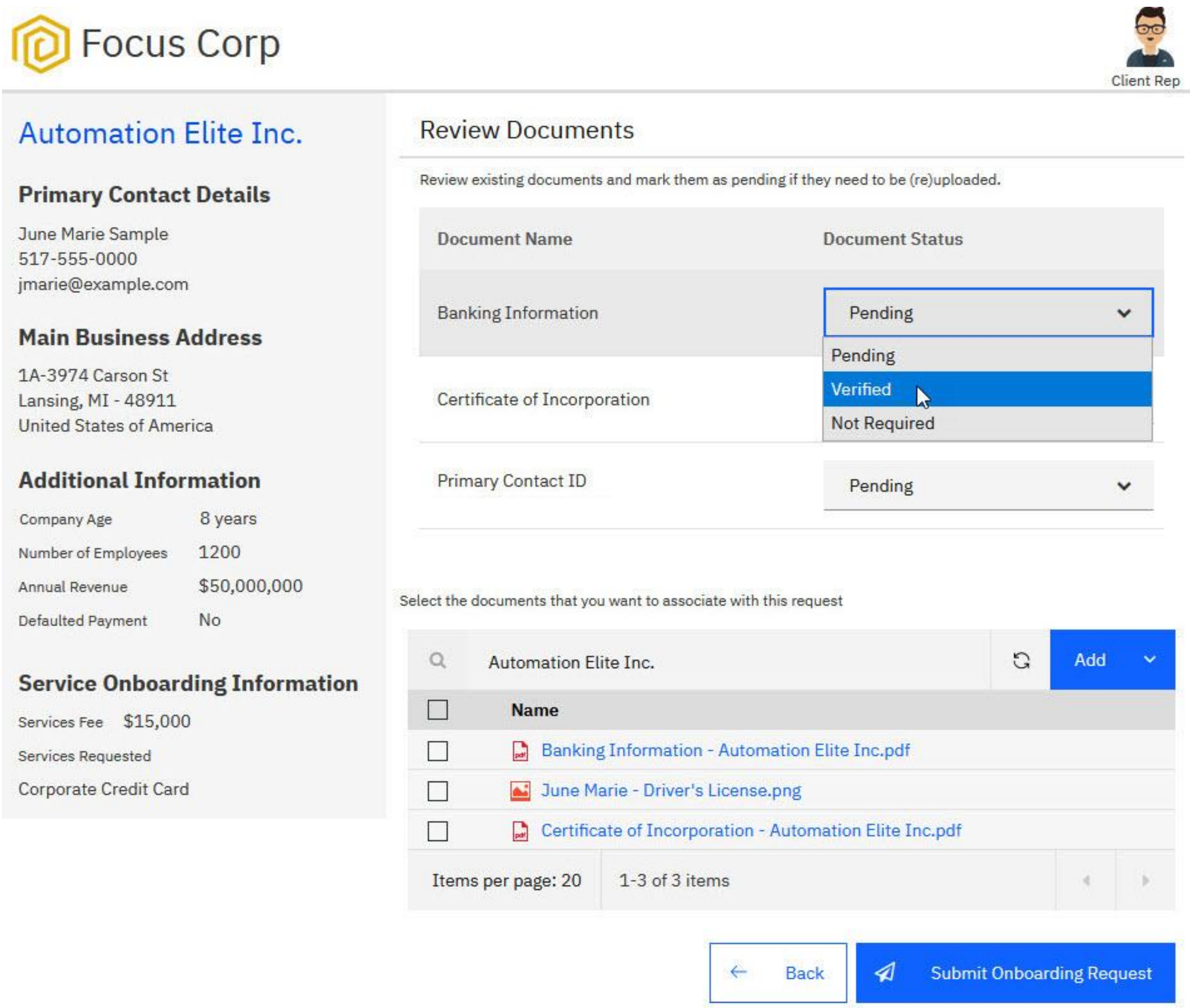




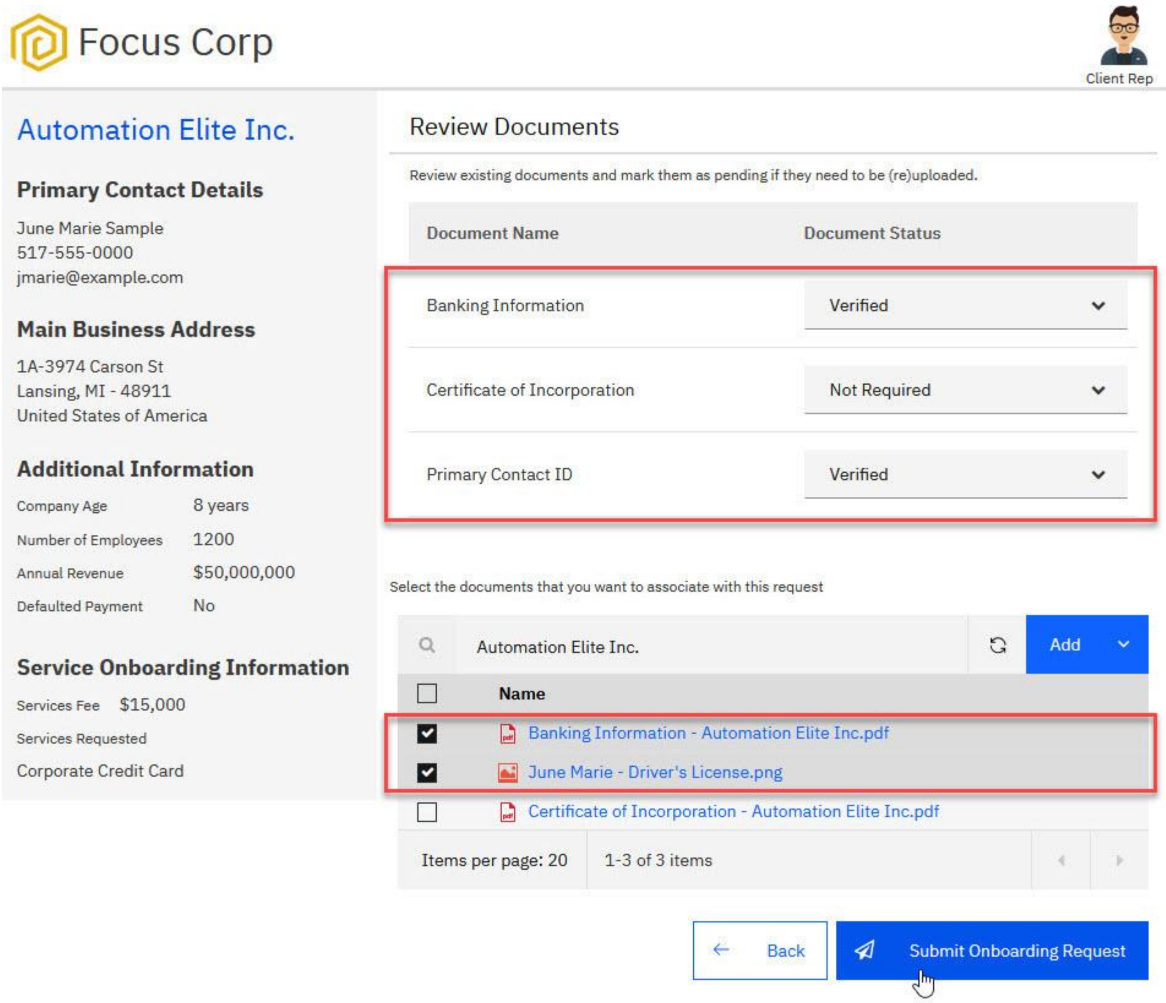
_3. Select Verified for Banking Information and Primary Contact ID.

_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.



_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.



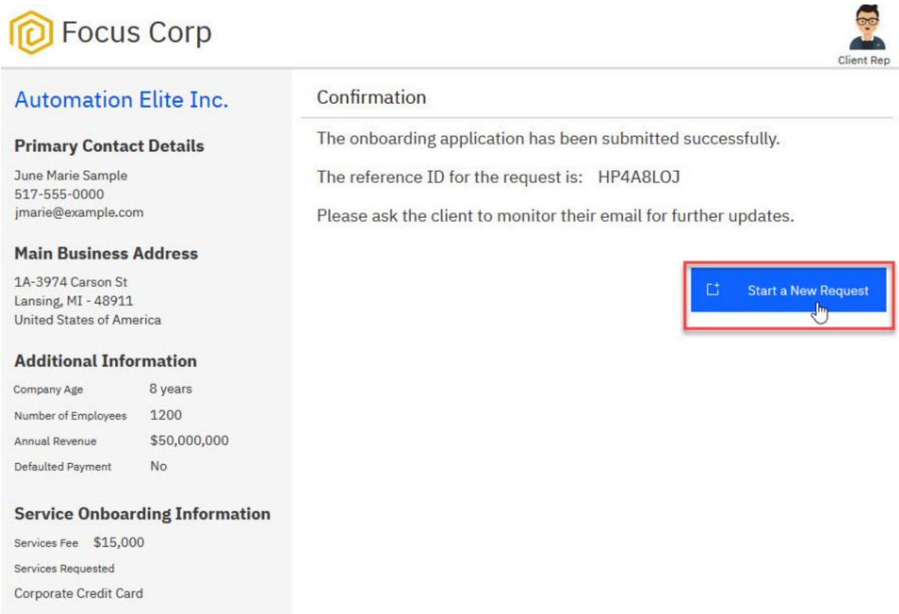
_6. **Click Submit Onboarding Request** to complete Automation Elite Inc.'s request and navigate to the final confirmation page.

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.

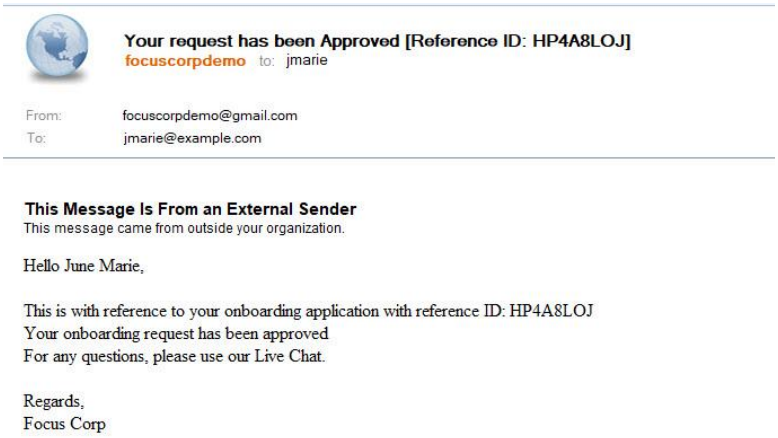


_2. **Click** on **Start a New Request** to get back to the first page to be able to continue onboarding the more clients.

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**

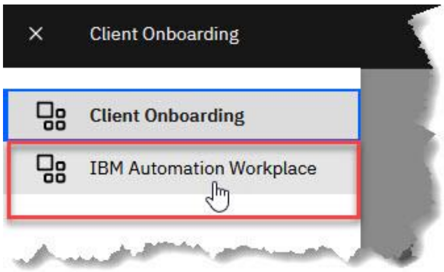


The email contains the reference ID as displayed on the final page of the Client Onboarding app. It lets you know that your onboarding request has been approved.

4.2.5 Checking the Client Rep notification about automated onboarding

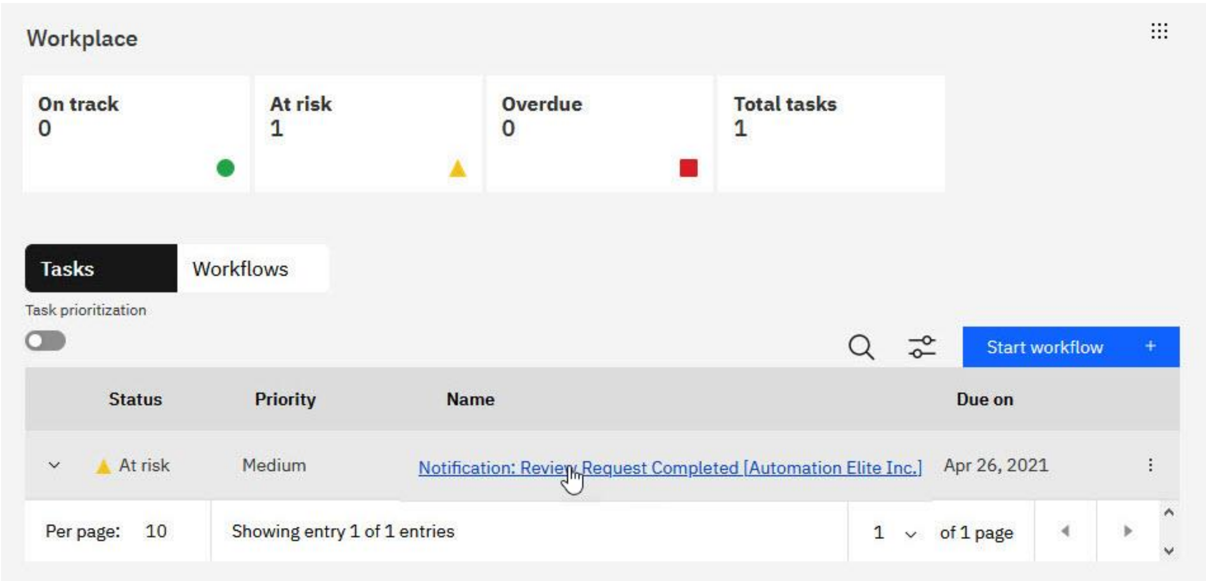
_1. **Switch** back from the email client to the browser window containing the **Client Onboarding app**.

_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.

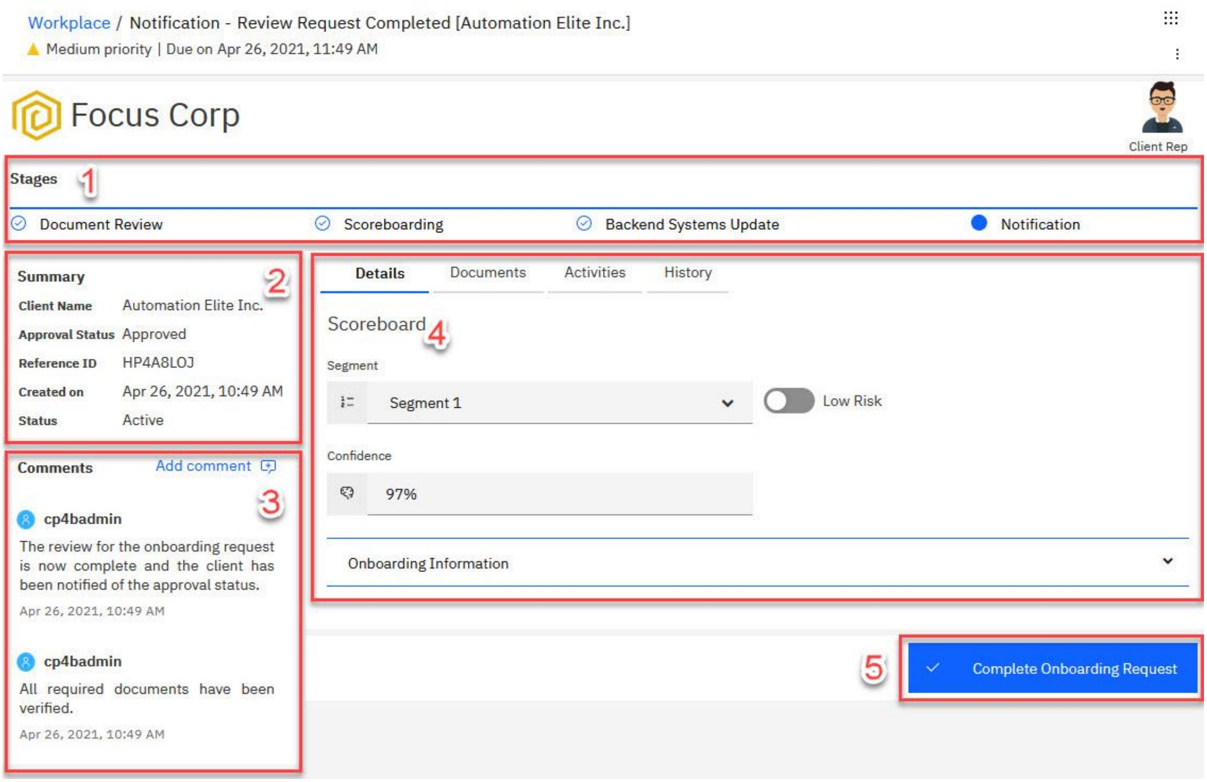
_3. **Open** the **task** that is available to you as client rep by **clicking on it**.



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

_4. **Explore** the task page.

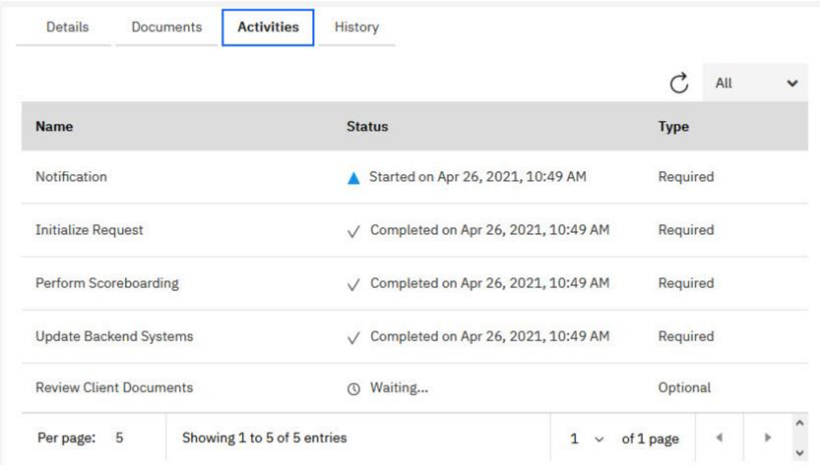
At the top (1) the four stages of the request processing are shown. This task is part of the last stage (Notification). The other stages have been processed automatically. In this stage you as the client representative are informed about the outcome of the onboarding request. The first panel on the left (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).



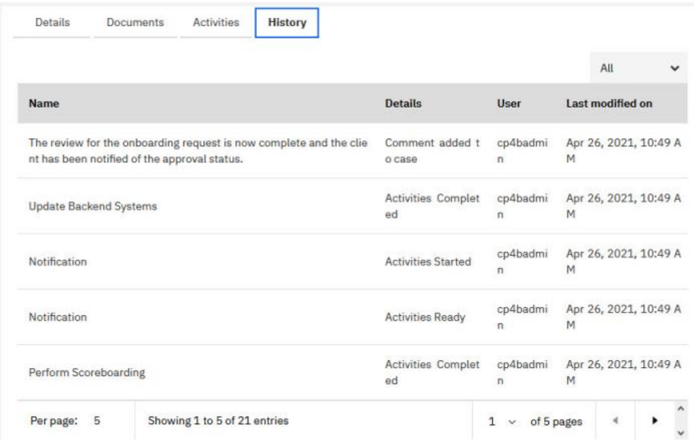
_5. **Explore** the Documents, Activities, and History tabs.

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.

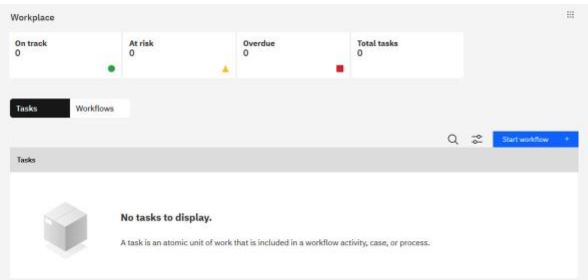
The **Activities** tab shows the status and type of all activities of the request. Since this is a case in the Workflow system, any discretionary activities defined in the case would be available here so that they can be started by the client representative.



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



_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.



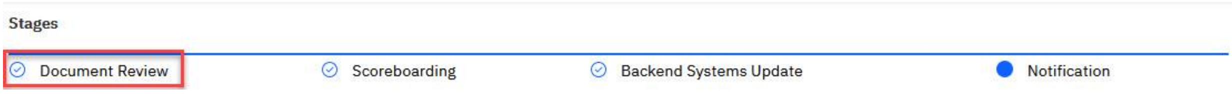
This completes the part of the exercise where you actively perform steps.

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.

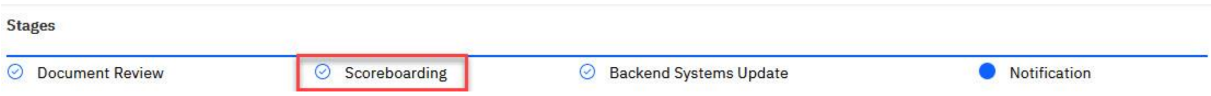
As part of the above fully automated client onboarding workflow you directly worked on the fourth stage of the request processing (Notification). The three request stages before that were already automatically completed and did not need manual activities.

4.2.6.1 Document Review



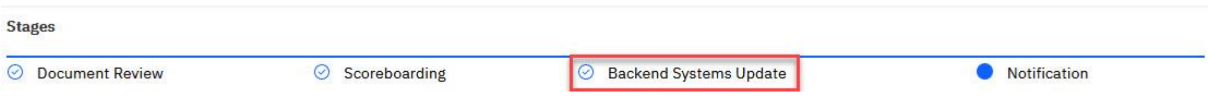
The first stage during processing the onboarding request is the Document Review stage. For the above request you have specified in the app that two documents are already verified and the third is not required. Therefore, this stage completes automatically.

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



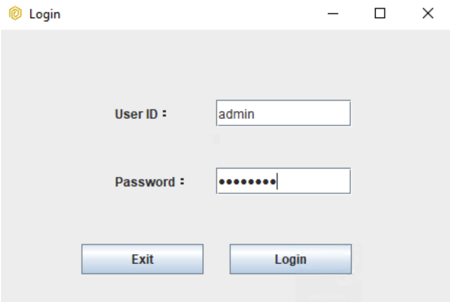
As part of the Backend Systems Update stage, Focus Corp needs to update some of its legacy systems of record:

- 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.

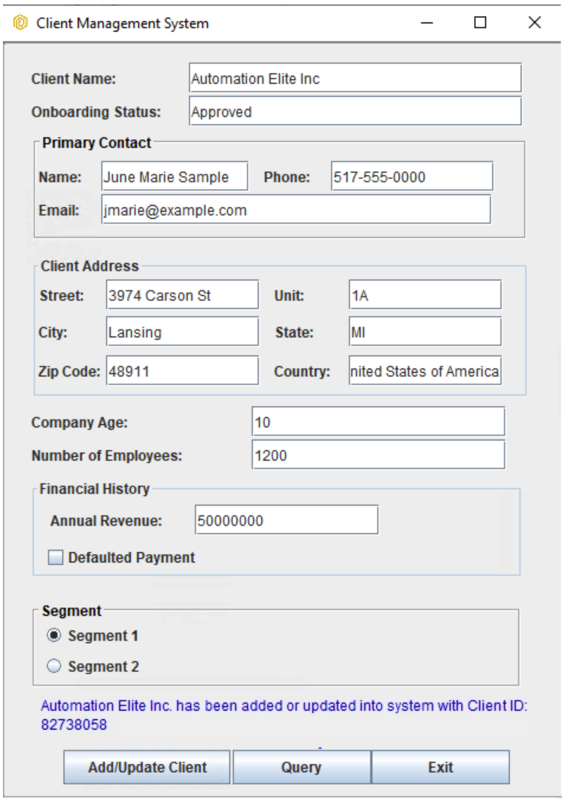
As Focus Corp strives for a high level of automation, they want to update the legacy systems automatically without involving a user. This also helps to remove the risk of potential human errors when copying and pasting information from one system to another. Therefore, they apply Robotic Process Automation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

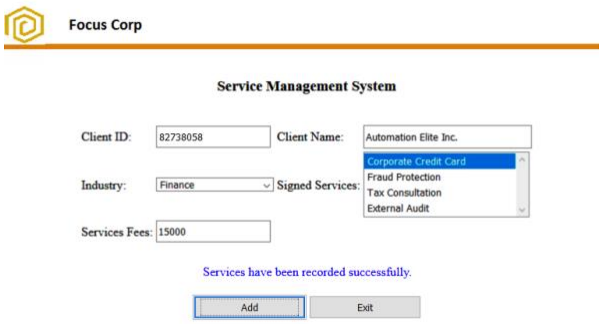


- Finally, it **closes** the Client Management System by **clicking** on **Exit**.

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.Hahnl@de.ibm.com / aswapnil@ca.ibm.com), and through the survey at the end of the event.