

Leveraging ODM decisions in watsonx Orchestrate.

Table of Contents

Table of Contents	1
<i>Introduction</i>	2
1- Reviewing the Operational Decision Manager decision	3
1.1 Introduce the customer service decision.	3
1.2 Provide an overview of the decision service.	6
1.3 Introduce production Rule Execution Server.	9
2- Creating of a new skill in watsonx Orchestrate	12
2.1 Connect the Discovery Service to the ODM Rule Execution Server.....	12
2.2 Create the customer service skill from the ODM Ruleapp.....	15
2.3 Publish the customer service skill to your personal skills	19
2.4 Add the customer service skill to your personal skills	25
2.5 Show the customer service skill.....	28
3- Sequencing skills into a composite skill	32
3.1 Create the customer service composite skill.....	32
4- Using the new skill in the call center	42
4.1 Add the customer service composite skill.....	42
4.2 Use the customer service composite skill	45
Summary	49

Introduction

Today we'll see how IBM's Watsonx Orchestrate capabilities can be used to enhance call center agent productivity, increase compliance with the organization business procedures, and reduce risk of inconsistency in the decision making process.

Using a customer service scenario, we'll see how to use a Watsonx Orchestrate discovery services to easily create a new decision automation skill from an existing IBM Operational Decision Manager (ODM) application. We'll look at how to create a new skill in just a few clicks, starting from an existing ODM service deployed in production. Then, we'll see how the built-in skill flow capability can be used to sequence several skills into a single activity.

We're using a Customer Service example, but the same discovery service can be used to leverage existing deployed decision services across your enterprise.

Let's get started!

1- Reviewing the Operational Decision Manager decision

1.1 Introduce the customer service decision.

Narration

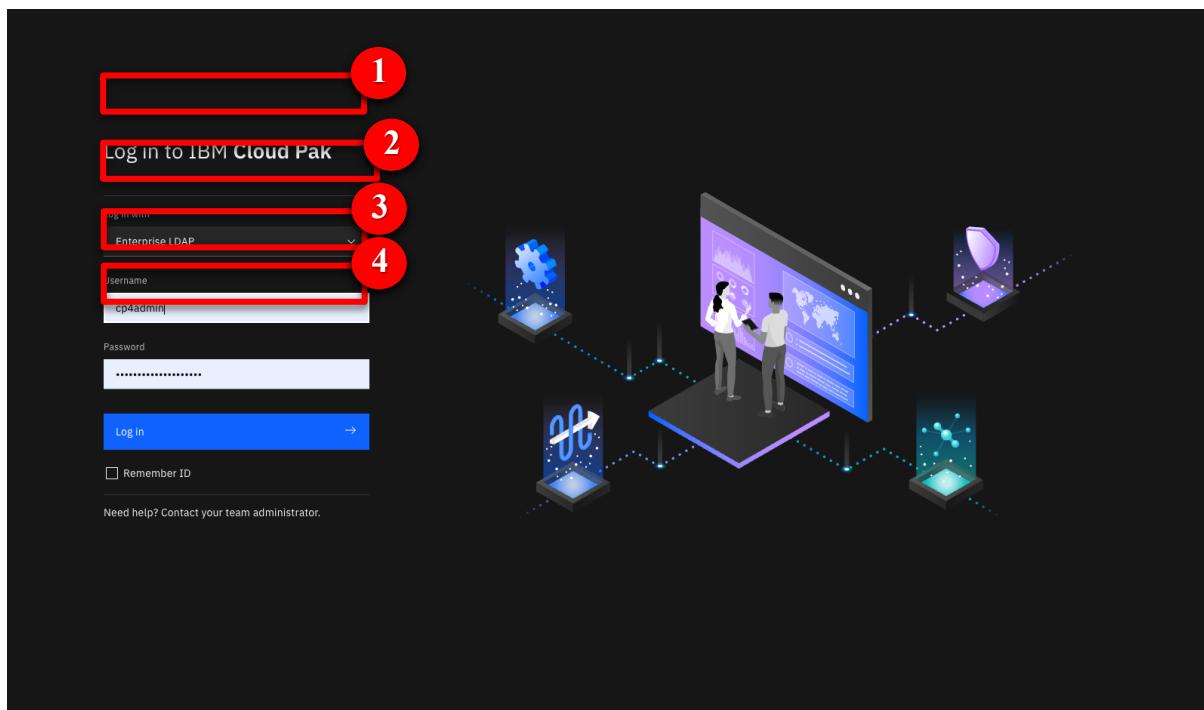
FocusCorp uses Operational Decision Manager (ODM) as a backend application to automatically validate and approve return requests from customers.

The company now wants to enable all call center agents to directly access the decision automation so they can determine immediately whether a return is approved while communicating with a customer.

Before seeing how to create such a skill in Watsonx Orchestrate, let's look at the existing application in ODM.

Action 1.1.1 Show the ODM **Business Console** screen that was opened during demo preparation. Select **Enterprise LDAP** (1), enter the Username **cp4admin** (2), enter the **password** (3) you have copied in your notebook and click **Log in** (4).

Note: The Decision Center console will start from the last page you were in when you left during your last connection.



Action 1.1.2 Click the **LIBRARY** tab.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the Decision Center interface. At the top, there is a navigation bar with tabs: HOME (highlighted with a red box), LIBRARY, WORK, and ADMINISTRATION. Below the navigation bar, there are three main sections: 'Welcome to Operational Decision Manager', 'Followed Rules' (with a message 'You have no followed rules.'), and 'Rules Recently Worked On' (with a message 'You have not worked on any rules yet.'). The central section contains links for 'Learn about the fundamentals of Decision Center' and 'Work with your decisions'.

Narration

The return policy is managed in ODM by FocusCorp's retail business team, using a dedicated business console called Decision Center. Let's see how the return policy is implemented in ODM.

Action 1.1.3 Click the **Customer Service** decision service.

The screenshot shows the 'Decision Services' list. At the top, there is a navigation bar with tabs: HOME, LIBRARY (highlighted with a red box), WORK, and ADMINISTRATION. Below the navigation bar, there is a table titled 'Decision Services' with columns for 'Date' and 'Name'. A single row is visible, showing 'Customer Service' with a timestamp of 'Created on 2023-10-03 at 10:23'. A red box highlights the 'Customer Service' link.

Action 1.1.4 Click the **main** branch.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the Decision Center interface. At the top, there are tabs for HOME, LIBRARY (which is selected), WORK, and ADMINISTRATION. Below the tabs, there's a navigation bar for 'Customer Service' with 'All Decision Services' and a dropdown for 'cp4admin'. The main area shows a tree view with a node labeled 'main' which is highlighted with a red box. To the right, there's a detailed view of a 'Decision Service' entry for 'main', showing it was created by cp4admin on Oct 23, 2023, and last changed by cp4admin on the same date. There are sections for 'Description' and 'Build Options'.

Action 1.1.5 Click the **Decision Artifact** tab, if you are not on that tab.

This screenshot shows the same Decision Center interface as above, but with a different tab selection. The 'Decision Artifacts' tab is now highlighted with a red box. The other tabs visible are Queries, Tests, Simulations, Deployments, Snapshots, and Model. The main workspace shows a list titled 'Customer Service' with a message 'There are no items to display'. On the right, there's a sidebar for 'Branch' and 'Stream', and a section for 'Goals' with a note to 'Click to add goals to this branch'. A search bar at the top right says 'Search for rules'.

Action 1.1.6 Click the X to remove any decision artefact filter (if any).

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the IBM Decision Center interface. The top navigation bar includes 'HOME', 'LIBRARY' (which is selected), 'WORK', and 'ADMINISTRATION'. The left sidebar shows 'Customer Service' and 'main'. The main content area has tabs for 'Decision Artifacts', 'Queries', 'Tests', 'Simulations', 'Deployments', 'Schemas', and 'Model'. A sub-menu under 'Decision Artifacts' shows 'All Projects' (selected) and 'Types (7)'. A red box highlights the 'Types (7)' button. The central panel displays a list titled 'Customer Service' with columns for 'Name', 'Last Changed By', and 'Last Changed On'. A message at the bottom says 'There are no items to display'. The right sidebar shows 'Branch' (selected) and 'Stream' tabs, and a section for 'Goals'.

Action 1.1.7 Click Main customer service flow.

This screenshot shows the same Decision Center interface as above, but with a different selection. The 'Customer service variables' item in the list is highlighted with a red box. The list shows two items: 'Customer service variables' and 'Main customer service flow'. Both items were last changed by 'rtsAdmin' on October 24, 2023.

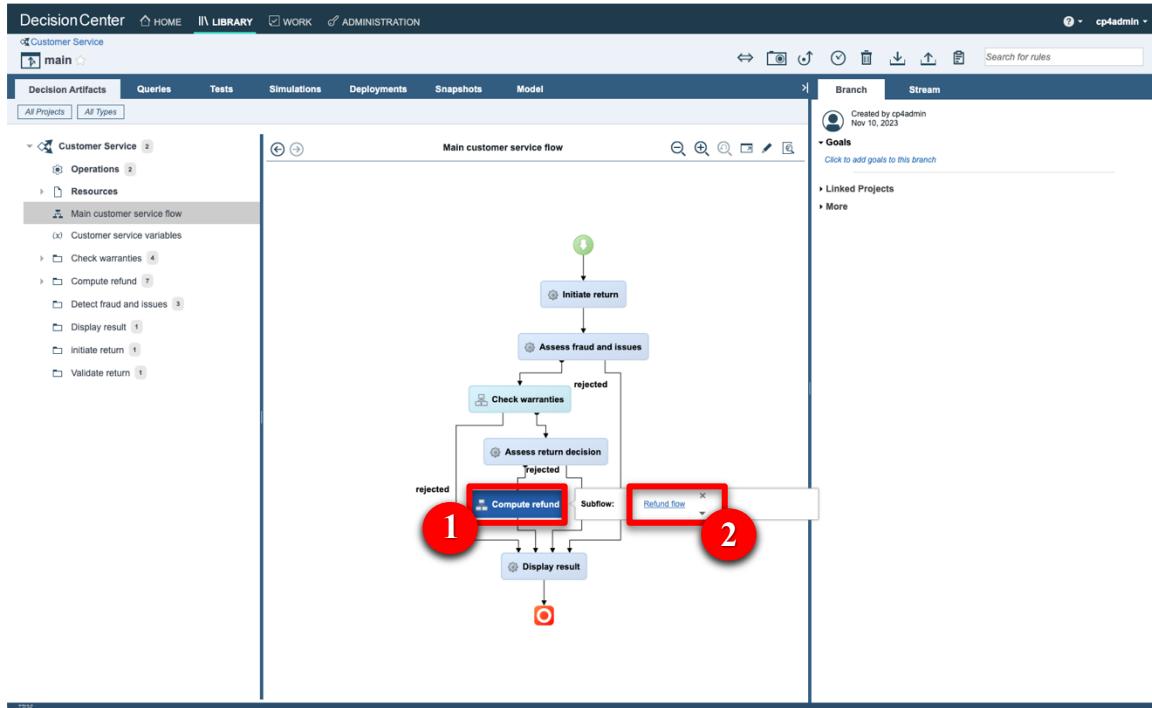
1.2 Provide an overview of the decision service.

Narration: The return validation policy is managed using ODM. The business logic is composed of rule artifacts like ruleflows, decision tables and business rules.

The main rule flow is the backbone of the decision service. It synchronizes a variety of rules that cover fraud detection, warranty validation, return policy and refund conditions.

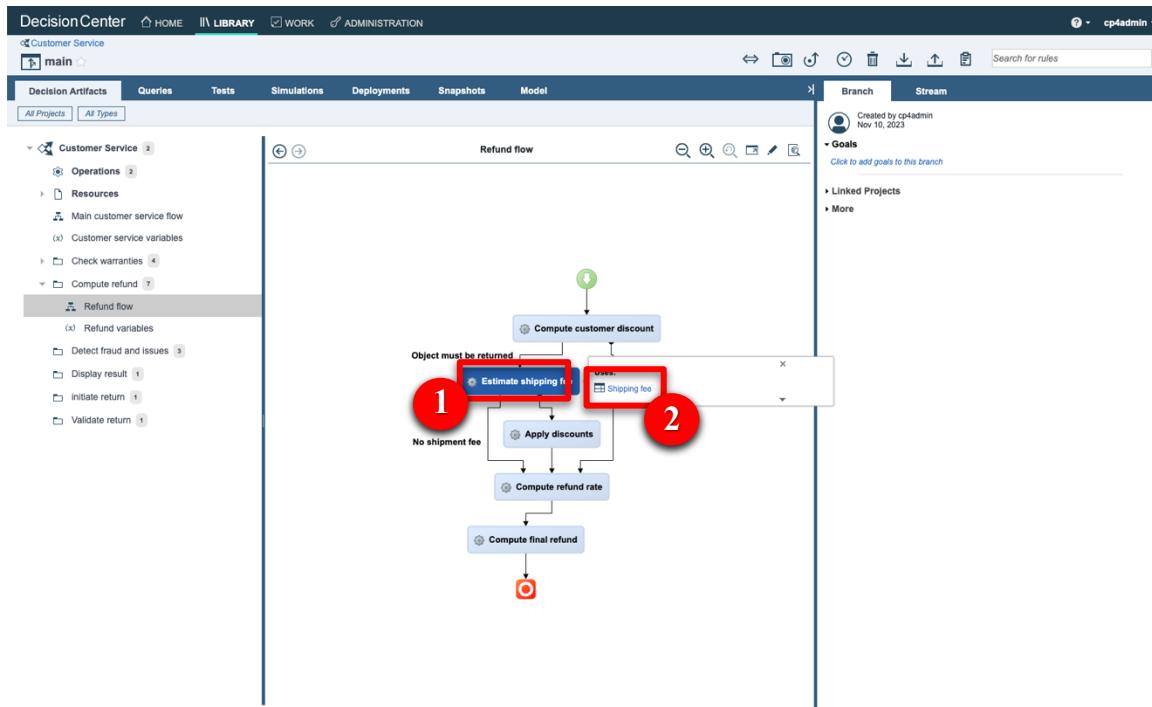
ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 1.2.1 Click the **Compute refund** box (1) and then the **Refund flow** link (2)



Narration: Let's look at one of the decision artifacts. The 'Shipping fee' decision table defines the fixed return fee depending on the location of the customer and the type of item being returned.

Action 1.2.2 Click the **Estimate shipping fee** box (1) and then the **Shipping fee** link (2) to open the decision table.



ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

Narration: Each row of the table corresponds to a specific business rule that can also be seen in natural language. In this rule, the return fee for grocery items in the United States is \$15 dollars. A message is also added to the response to document the decision.

Action 1.2.3 Hover your cursor over the header of row 4 to display the ‘grocery’ business rule.

Country	Purchase type	Fee	Comment
1 USA	Beauty, Books, Clothin...	8.5	-
2 USA	Jewelry, Pets	80	-
3 USA	Electronics, Garden,...	75	-
4 USA	Grocery	15	-
5 USA	Furniture	250	-
6 Canada	Beauty, Books, Clothin...	35	-
7 Canada	Electronics, Garden	90	-
8 Canada	Jewelry	110	-
9 Canada	Otherwise	-1	-
10 Other		-1	-
11			-
12			-
13			-
14			-
15			-
16			-
17			-
18			-
19			-
20			-
21			-
22			-
23			-

Country	Purchase type	Fee	Comment
1 USA	Beauty, Books, Clothin...	8.5	-
2 USA	Jewelry, Pets	80	-
3 USA	Electronics, Garden,...	75	-
4 USA	Grocery	15	-
10 Other		-1	-
11			-
12			-
13			-
14			-
15			-
16			-

If all of the following conditions are true :

- (the country of "the customer" is USA)
- (the purchase category of "the purchase to be returned" is one of { Grocery })

Then set 'the shipping fee' to 15 ;
set the comments of 'the customer service decision' to the comments of 'the customer service decision' + " - Shipping fee: " + 'the shipping fee' ;

Action 1.2.4 Click Main customer service flow.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the Decision Center interface. On the left, there's a navigation tree under 'Customer Service' with a red box highlighting 'Main customer service flow'. The main panel displays a rule titled 'Compute refund > Shipping fee'. It includes a table of preconditions:

Country	Purchase type	Fee	Comment
1 USA	Beauty, Books, Clothin...	8.5	-
2 USA	Jewelry, Pets	80	-
3 USA	Electronics, Garden....	75	-
4 USA	Grocery	15	-

Below the table is the rule logic:

```

if
all of the following conditions are true :
- (the country of "the customer" is USA)
- (the purchase category of "the purchase to be returned" is one of { Grocery })
then
set "the shipping fee" to 15;
set the comments of "the customer service decision" to the comments of "the customer service decision" + " - Shipping fee: " + "the shipping fee";

```

The logic table continues with rows 10 through 16, where row 14 has a blue box around it.

Narration: This decision service is deployed in a production environment and is invoked by FocusCorp's enterprise applications. Let's look at the deployment environment.

1.3 Introduce production Rule Execution Server.

Narration: The ODM Rule Execution Server is a console to monitor rule applications deployed on a given server. From this console, the rule administrator can test a rule application, trace its usage, run diagnostics, and access execution traces when required.

Action 1.3.1 Show the **ODM Rule Execution Server** screen that was opened during demo preparation.

The screenshot shows the Rule Execution Server console. At the top, there's a navigation bar with tabs: Home, Explorer, Decision Warehouse, Diagnostics, Server Info, and REST API. The 'Home' tab is selected. Below the navigation bar, there's a section titled 'Welcome to the Rule Execution Server console' with links to various tools:

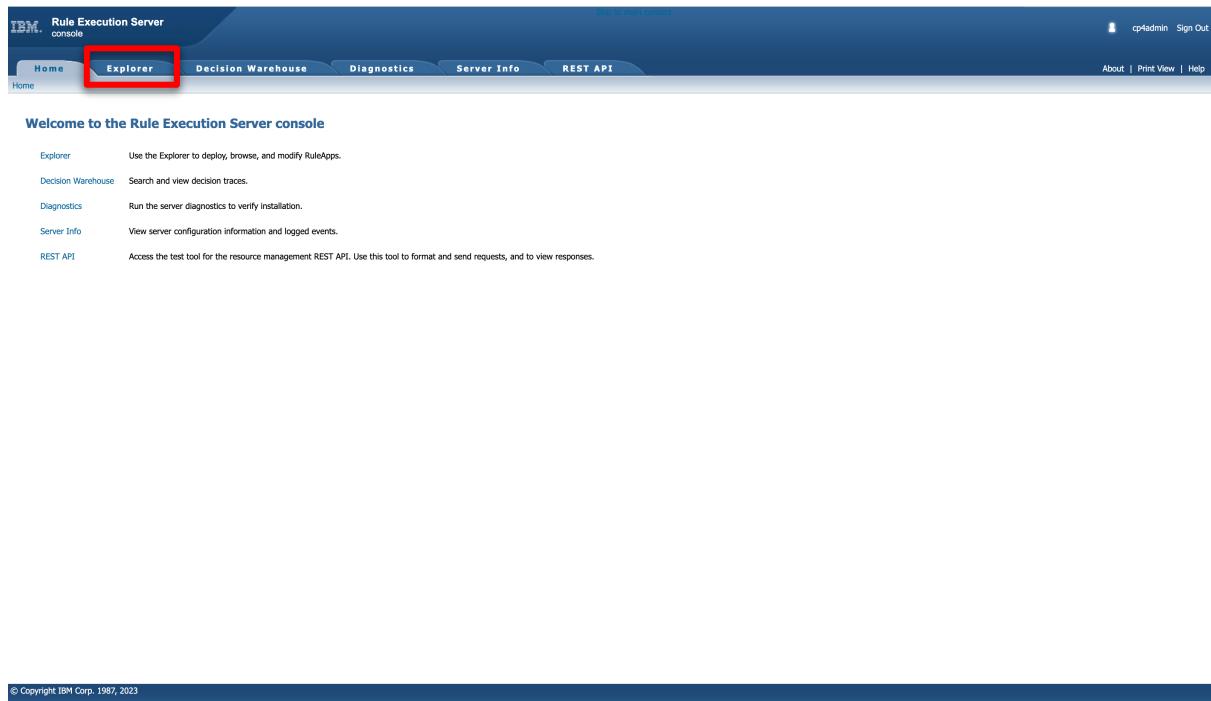
- Explorer: Use the Explorer to deploy, browse, and modify RuleApps.
- Decision Warehouse: Search and view decision traces.
- Diagnostics: Run the server diagnostics to verify installation.
- Server Info: View server configuration information and logged events.
- REST API: Access the test tool for the resource management REST API. Use this tool to format and send requests, and to view responses.

At the bottom of the page, there's a copyright notice: © Copyright IBM Corp. 1987, 2023.

Action 1.3.2 Click the **Explorer** tab.

ODM and wxOODM demonstration for CP4BA 23.0.1

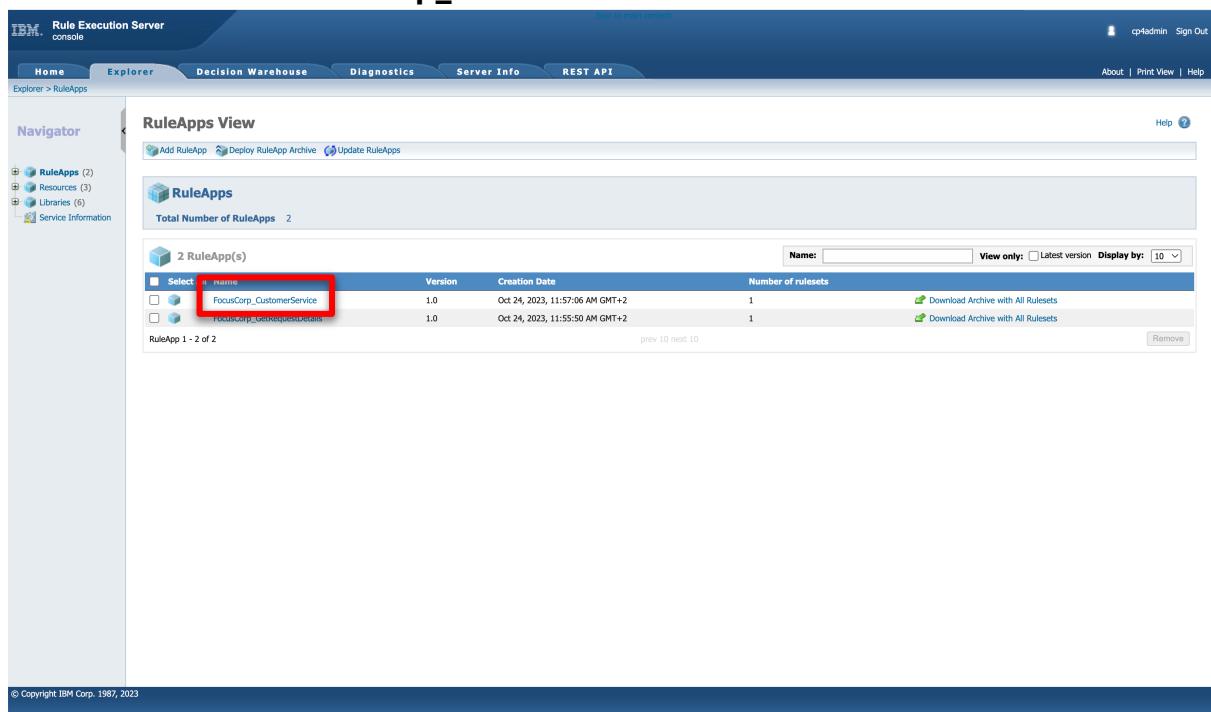
DRAFT VERSION – DO NOT DISTRIBUTE



The screenshot shows the IBM Rule Execution Server console interface. The top navigation bar includes links for Home, Explorer (which is highlighted with a red box), Decision Warehouse, Diagnostics, Server Info, and REST API. On the right side, there are links for cp4admin, Sign Out, About, Print View, and Help. Below the navigation bar, a section titled "Welcome to the Rule Execution Server console" provides brief descriptions for each tab: Explorer, Decision Warehouse, Diagnostics, Server Info, and REST API. At the bottom of the page, a copyright notice reads "© Copyright IBM Corp. 1987, 2023".

Narration: Two RuleApps are deployed in this production environment. The ‘Customer Service’ RuleApp manages the return policy we just looked at in the Business Console.

Action 1.3.3 Click FocusCorp_CustomerService.



The screenshot shows the Rule Apps View page within the Rule Execution Server console. The left sidebar has a "Navigator" section with links for RuleApps (2), Resources (3), Libraries (6), and Service Information. The main content area is titled "RuleApps View" and contains a table of deployed RuleApps. The table has columns for Select, Name, Version, Creation Date, and Number of rulesets. Two entries are listed: "FocusCorp_CustomerService" (Version 1.0, created Oct 24, 2023) and "FocusCorp_UtnequestsDetails" (Version 1.0, created Oct 24, 2023). The "FocusCorp_CustomerService" row is highlighted with a red box. At the bottom of the table, there are links for "Download Archive with All Rulesets" and "Remove". A copyright notice "© Copyright IBM Corp. 1987, 2023" is at the very bottom.

Action 1.3.4 Click FocusCorp_Customer_Service.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the RuleExecutionServer console interface. In the top navigation bar, 'Rule Execution Server' and 'cp4admin' are visible. The main area is titled 'RuleApp View' for 'FocusCorp_CustomerService/1.0'. It displays the ruleapp's name, version (1.0), creation date (Oct 24, 2023, 11:57:06 AM GMT+2), and a 'Show Properties (0)' link. Below this is a table for '1 Ruleset(s)'. A single row is shown with the following columns: Version (1.0), Ruleset Path (/FocusCorp_CustomerService/1.0/FocusCorp_Customer_Service/1.0), and Creation Date (Oct 24, 2023, 11:57:06 AM GMT+2). There are 'Download' and 'Remove' buttons at the bottom of the table. On the left sidebar, under 'Navigator', there are links for RuleApps (2), Resources (3), Libraries (6), and Service Information.

Narration: The customer service application has one ruleset with two input parameters – the customer and the purchase to be returned. The decision service and the ruleset it contains are versioned, so a user can decide to use a specific version, or the latest deployed version of the RuleApp..

Action 1.3.5 Point out and explain the **FocusCorp_Customer_Service** ruleset: The output parameter (1), the return decision (2) and the versioning(3).

The screenshot shows the RuleExecutionServer console interface. In the top navigation bar, 'Rule Execution Server' and 'cp4admin' are visible. The main area is titled 'Ruleset View' for 'FocusCorp_CustomerService/1.0/FocusCorp_Customer_Service/1.0'. It displays the ruleset's name, version (1.0), creation date (Oct 24, 2023, 11:57:06 AM GMT+2), and a 'Permanent link' button. Below this is a table for 'Ruleset Parameters'. Three red numbers point to specific parts of the interface: '1' points to the 'purchase' parameter; '2' points to the 'decision' parameter; and '3' points to the 'Version' column header. The table also includes columns for 'Direction Name', 'Kind', and 'XOM Type'. At the bottom of the page, there are links for 'Show Managed URIs (1)', 'Show Properties (15)', 'Show Decision Warehouse Options (tracing currently disabled)', 'Show HTDS Options', and 'Show Archive Content'. The footer of the page includes a copyright notice: '© Copyright IBM Corp. 1967, 2023'.

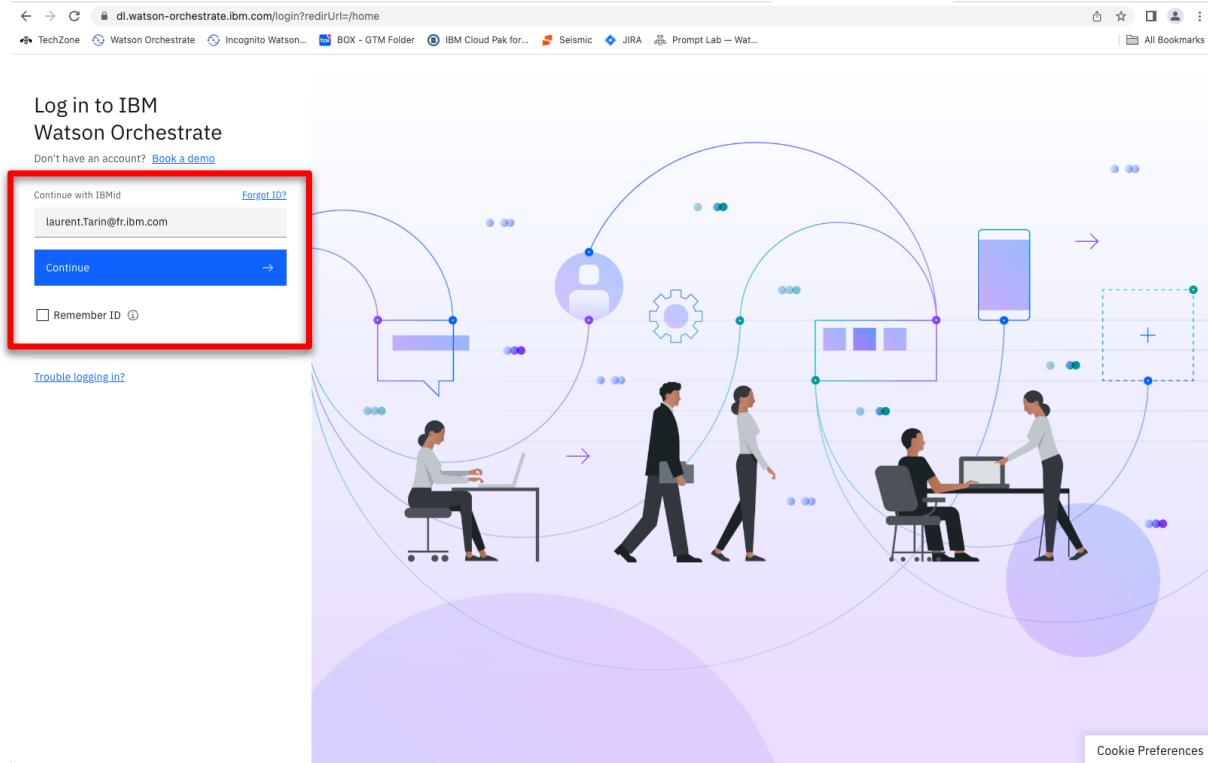
Narration: Let's now see how to leverage these deployed decisions using watsonx Orchestrate to make these return decisions visible to call center agents.

2- Creating of a new skill in watsonx Orchestrate

2.1 Connect the Discovery Service to the ODM Rule Execution Server

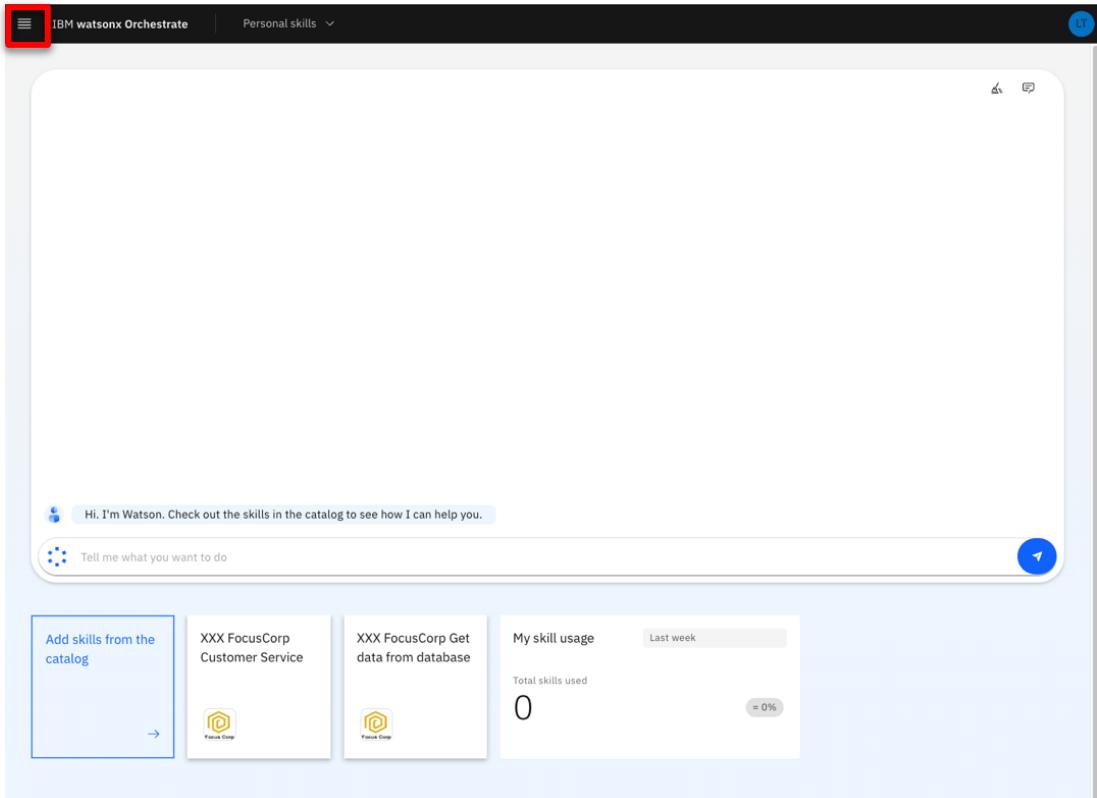
Narration: Let's now log in to watsonx Orchestrate with the 'Builder' profile. This profile enables us to create, enrich and publish skills.

Action 2.1.1 Log in to your watsonx Orchestrate instance.

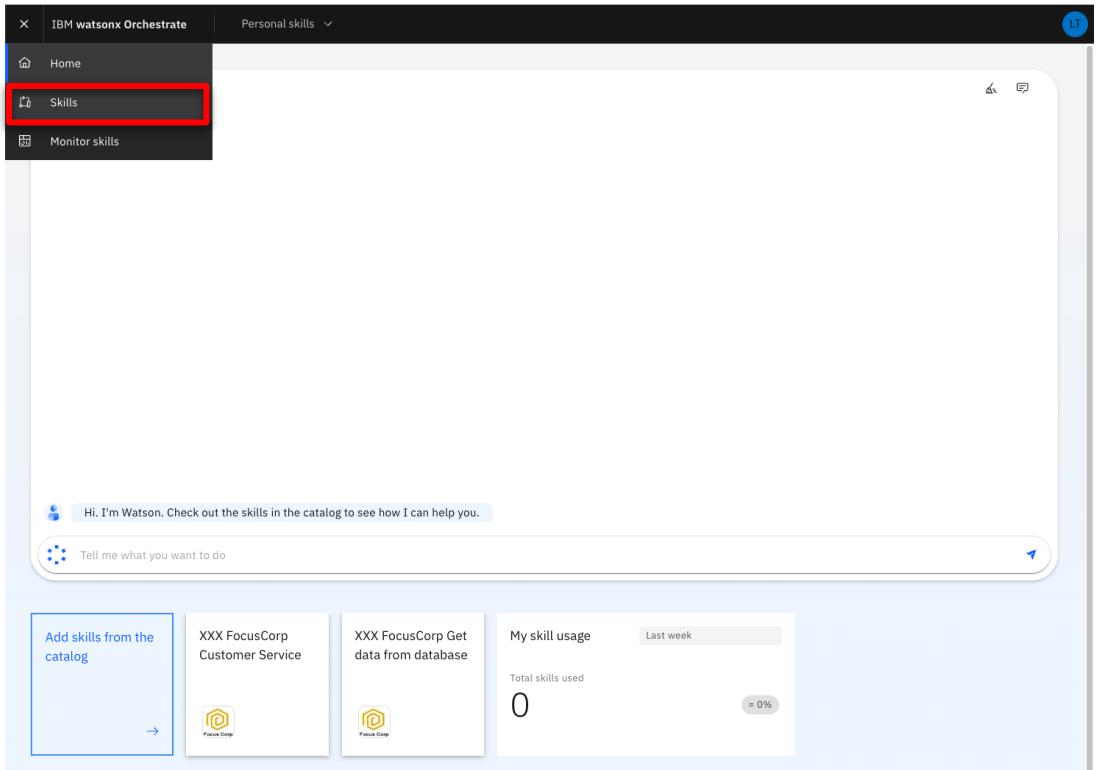


Action 2.1.2 Click the hamburger icon.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



Action 2.1.3 Click Skills.



Narration: watsonx Orchestrate offers a wide variety of skills that can be added for a single individual (personal skill) or the whole team. Let's create a new personal skill.

Action 2.1.4 Click Add skills.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. At the top right, there is a blue button labeled 'Add skills' with a red box drawn around it. Below the button is a search bar with the placeholder 'Find a skill'. The main area displays a table of skills with columns: Name, Description, Step in the process, Status, Skill type, and an ellipsis column. The skills listed include various automation and composite services.

Name	Description	Step in the process	Status	Skill type	⋮
CT Execute MAH-Recommend-produ...	CT Execute MAH-Recommend-produ...	Ready to use	Published	Automation	⋮
Execute retention-offer	Execute retention-offer	Ready to use	Published	Automation	⋮
Composite with decision	Composite with decision	Ready to use	Published	Composite	⋮
ODM CP4BA OnPrem Invokes the e...	Executes the decision service ...	Ready to use	Published	Imported	⋮
Vacation approval	Vacation approval	Ready to use	Published	Imported	⋮
Custom offer message	Custom offer message	Ready to use	Published	Automation	⋮
Draft - Vacation Evaluation	Eligibility to evaluate the va...	Ready to use	Published	Composite	⋮
Execute Sales discount	Execute Sales discount	Ready to use	Published	Automation	⋮
Sales company status	Sales company status	Ready to use	Published	Automation	⋮
Vacation Evaluation Skill	Skill for evaluating the vacat...	Ready to use	Published	Composite	⋮

Narration: There are various ways to create a skill in Watsonx Orchestrate. One of them is to use a discovery services to create new skills from IBM Cloud Pak for Business Automation that are deployed on SaaS or on premises, or from RPA SaaS. The automation services we want to leverage are deployed on a containerized version of ODM on premises.

Action 2.1.5 Click the **IBM Cloud Pak for Business Automation – On premises** tile.

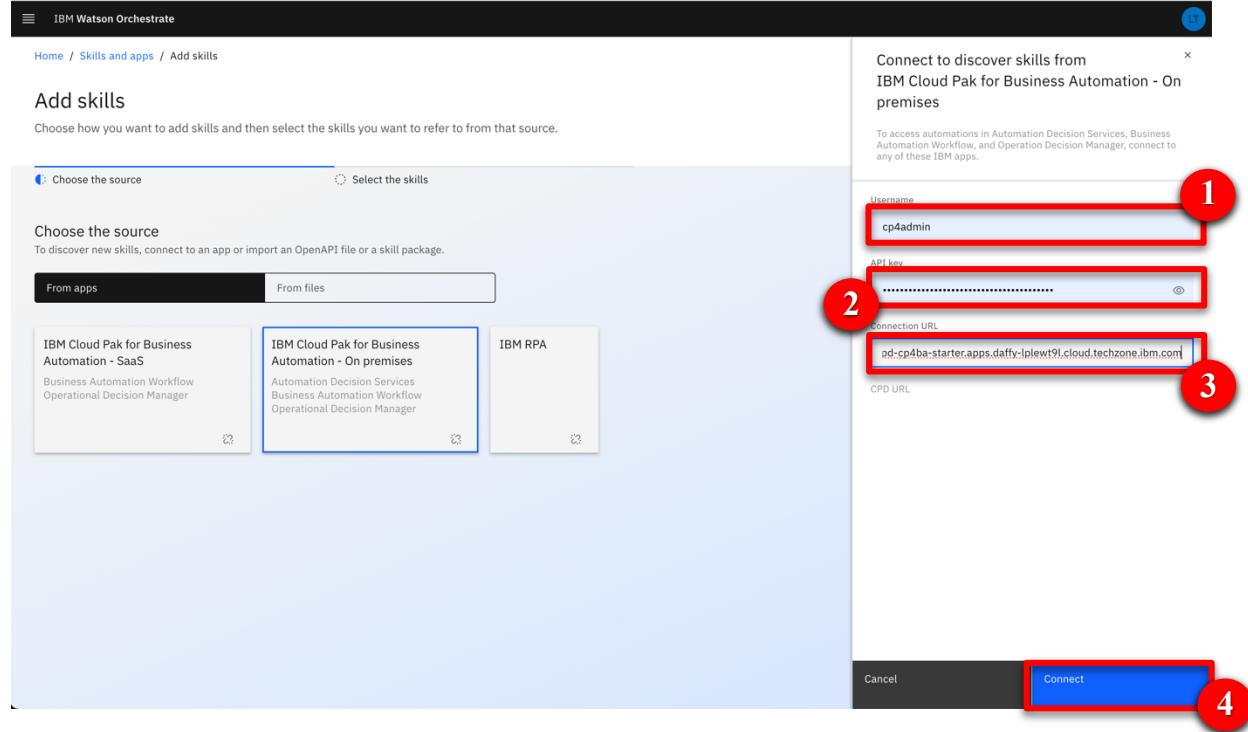
The screenshot shows the 'Add skills' dialog box. At the top left, there are two tabs: 'Choose the source' (selected) and 'Select the skills'. Below the tabs, there is a section titled 'Choose the source' with a sub-instruction: 'To discover new skills, connect to an app or import an OpenAPI file or a skill package.' There are two buttons at the bottom of this section: 'From apps' (selected) and 'From files'. To the right of these buttons is a list of skill sources. The 'IBM Cloud Pak for Business Automation - On premises' tile is highlighted with a red box. Other tiles visible include 'IBM RPA' and parts of other tiles like 'Business Automation Workflow' and 'Operational Decision Manager'. At the bottom right of the dialog box is a 'Cancel' button.

Note: If you are using a SaaS environment, click the **IBM Cloud Pak for Business Automation – SaaS** tile and use the basic authentication credentials provided by your SaaS admin.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Narration: To access this environment, an API key has been generated by the Cloud Pak for Business Automation administrator. With this API key and the cluster URL, we can set up the discovery service and let it access all the deployed automation on this specific environment.

Action 2.1.6 Enter your **Username** (1), **API key** (2) and **Connection URL** (3) you stored in your notebook in the preparation phase. Click **Connect** (4).



2.2 Create the customer service skill from the ODM Ruleapp

Narration: The discovery service lets us see all the deployed business automation that we can leverage to create a new skill.

Action 2.2.1 Expend the **Automations** folder.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

IBM Watson Orchestrate

Home / Skills and apps / Add skills

Add skills

Choose how you want to add skills and then select the skills you want to refer to from that source.

Choose the source Select the skills

Select the skills
Select the skills you want to add to the skill set. Currently, 0 of 0 skills are selected.

Automations

Cancel Save as draft

Narration: ‘FC_CustomerService’ is one of the deployed ODM applications we can leverage. The new skill we are about to create will execute the business rules deployed on the rule execution server that we saw earlier.

Action 2.2.2 Select **FC_CustomerService**.

IBM Watson Orchestrate

Home / Skills and apps / Add skills

Add skills

Choose how you want to add skills and then select the skills you want to refer to from that source.

Choose the source Select the skills

Select the skills
Select the skills you want to add to the skill set. Currently, 0 of 0 skills are selected.

Automations

FC_CustomerService

FocusCorp_CustomerServ...

FocusCorp_Get_request_...

Cancel Save as draft

Narration: Saving as a draft creates a skill in watsonx Orchestrate that will use the same input data and provide the same output results as the selected decision service.

Action 2.2.3 Select the ‘Invokes the execution..’ skill (1) and click **Save as draft** (2).

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Add skills' page in IBM Watson Orchestrate. At the top, there are two tabs: 'Choose the source' (selected) and 'Select the skills'. Below this, a section titled 'Select the skills' displays a table of skills. One skill, 'FC_CustomerService', is selected, indicated by a checked checkbox. A red circle labeled '1' points to this checkbox. In the bottom right corner of the table area, there is a red circle labeled '2' pointing to the 'Save as draft' button.

Narration: Next, we'll configure the skill to define how it asks for the input and displays the output. We'll also train the natural language processing (NLP) engine on the phrases that can be used to invoke the skill.

Action 2.2.4 Search for ‘FC’ to access the recently imported skill.

The screenshot shows the 'Skills and apps' page in IBM Watson Orchestrate. A search bar at the top contains the text 'Fc', which is highlighted with a red box. To the right of the search bar, there is a green notification box with the text '1 skill successfully imported SUCCESS 11:35:57'. Below the search bar, a table lists various skills. One skill, 'ODM CP4BA OnPrem Invokes the e...', is visible and has a status of 'Ready to use'. A red box highlights the search bar.

Narration: The discovery service has correctly created the skill in the catalog. As we can see, it is not yet ready to be published in the skills catalog.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 2.2.5 Expand the **Invokes the execution of the decision service operation XXX_FC_CustomerService** skill (XXX being your initials used during the demo prep).

Note: The **Step in the process** for this skill should read '**Just 1 step away to be ready**'.
The **Status** for this skill should read '**Ready to publish**'.

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. A search bar at the top contains 'fc'. Below it is a table titled 'Skills' with columns: Name, Description, Step in the process, Status, and Skill type. One row is selected, highlighted with a red box around its 'Name' cell. Two red arrows point from the text 'Just 1 step away to be ready' in the 'Step in the process' column and 'Ready to publish' in the 'Status' column to the respective cells in the table.

Action 2.2.6 Make sure you are on the right skill checking you are the author of the skill.

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. A search bar at the top contains 'fc'. Below it is a table titled 'Skills' with columns: Name, Description, Step in the process, Status, and Skill type. One row is selected, highlighted with a blue box around its 'Name' cell. The 'Description' and 'Added on' fields are visible below the table. At the bottom, the 'Author' field is shown with the value 'laurent.tarin@fr.ibm.com', with a red arrow pointing to it.

Narration: As a skill builder, we can define the way users will interact with our skill. This is required before publishing the skill.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 2.2.7 Click the corresponding ellipsis icon.

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. A specific skill card is selected, displaying its details. The 'More options' button (three dots) at the end of the row is highlighted with a red box.

Name	Description	Step in the process	Status	Skill type
Invokes the execution of the d...	Executes the decision service ...	Just 1 step away to be ready	Ready to publish	Imported

Description: Executes the decision service operation XXX_FC_CustomerService with the path /FC_CustomerService/1.0/XXX_FC_CustomerService/1.0.
Added on: Fri Oct 27 2023 11:52:24 GMT+0200 (Central European Summer Time)
Updated on: Fri Oct 27 2023 11:52:24 GMT+0200 (Central European Summer Time)
Author: laurent.tarin@fr.ibm.com

Action 2.2.8 Click Enhance this skill.

The screenshot shows the same 'Skills and apps' section as the previous one. The 'Enhance this skill' button on the right side of the skill card is highlighted with a red box.

Enhance this skill
Delete this skill
Export this skill

2.3 Publish the customer service skill to your personal skills

Narration: The first thing we'll customize is the title of the skill. On the right we see how the skill will be displayed to users. As this demo environment is shared across various users, we'll add initials to easily find the skill in the catalog.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 2.3.1 Enter an easy-to-find skill name (e.g., ‘**New XXX FocusCorp customer service.**’ – XXX being your own initials)

The screenshot shows the 'Enhance this skill' interface. The 'Name' tab is selected, displaying the skill name 'New XXX FocusCorp customer service.' which is highlighted with a red box. Other tabs include 'Input', 'Output', 'Security', 'Phrases', and 'Next best skills'. On the right, there's a 'Preview' section showing how the skill will look in the catalog and skill set, both featuring the same skill name and a small IBM logo. At the bottom are 'Cancel', 'Publish', and 'Save as draft' buttons.

Narration: We can customize how the inputs will be displayed and edit a specific label for each entry. We can also specify what attributes will be required to invoke the skill.

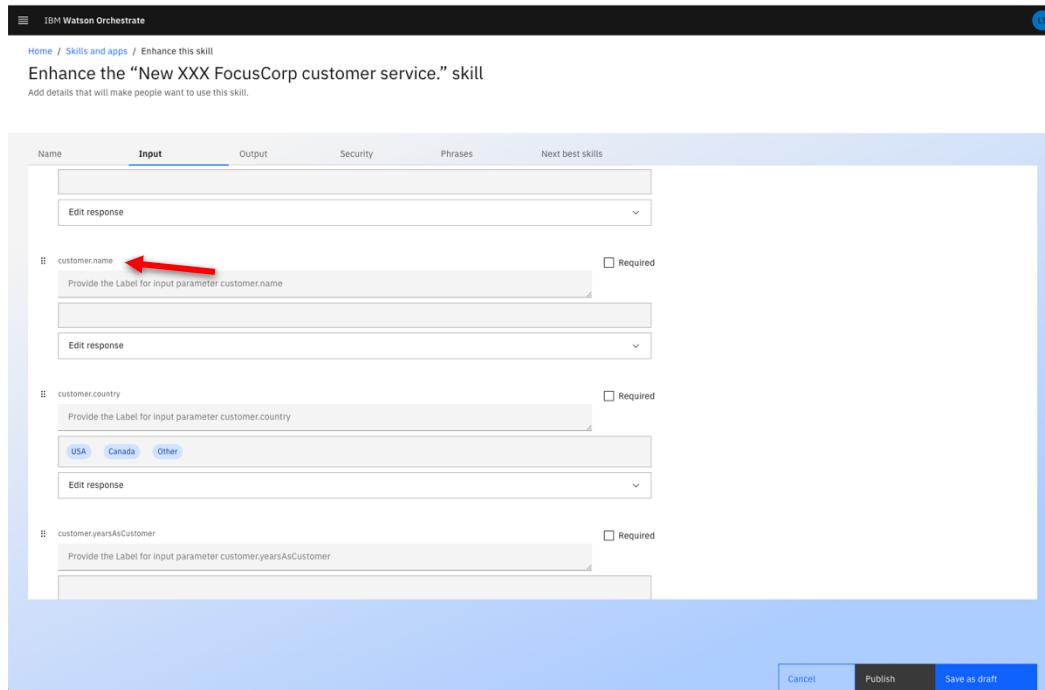
Action 2.3.2 Click the **Input** tab.

The screenshot shows the 'Enhance this skill' interface with the 'Input' tab selected, indicated by a red box. The 'Watson asks' section contains two input fields: one for 'DecisionID' with a placeholder 'Provide the Label for input parameter __DecisionID__' and another for 'customer.name' with a placeholder 'Customer name'. Both fields have a 'Required' checkbox. Below each field is an 'Edit response' dropdown and a 'System' section. At the bottom are 'Cancel', 'Publish', and 'Save as draft' buttons.

Action 2.3.3 Scroll down to the **customer.name** field.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

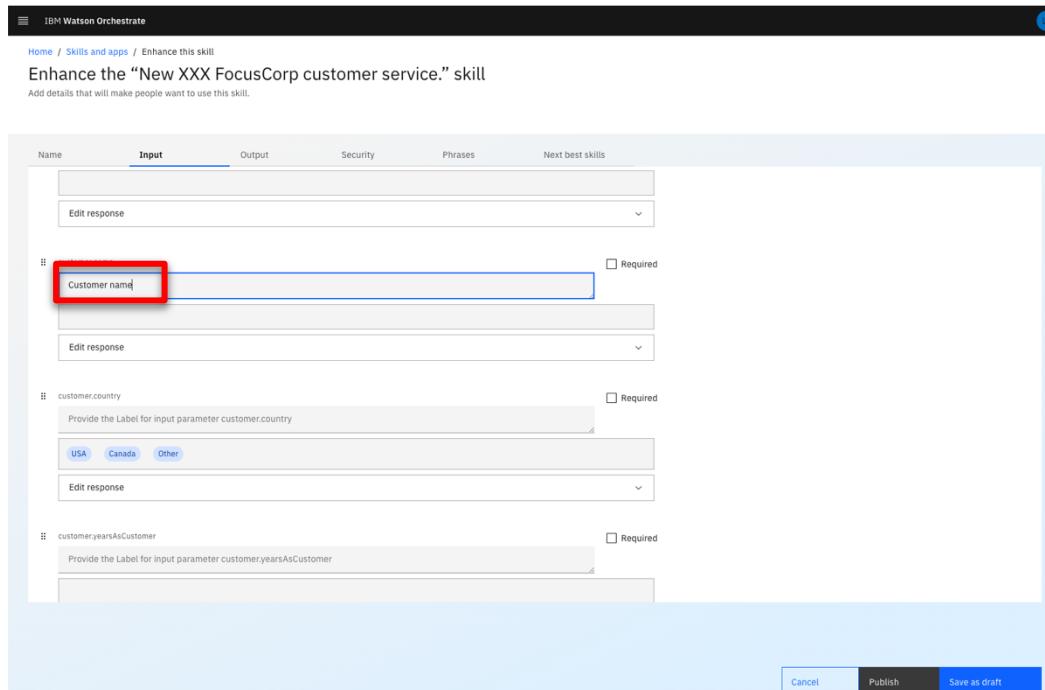


The screenshot shows the 'Input' tab of a skill configuration page. At the top, there are tabs for Name, Input, Output, Security, Phrases, and Next best skills. The 'Input' tab is selected. Below the tabs, there are three input parameters:

- customer.name**: This field has a red arrow pointing to it. It contains the placeholder text "Provide the Label for input parameter customer.name". To its right is a checkbox labeled "Required".
- customer.country**: This field contains the placeholder text "Provide the Label for input parameter customer.country". To its right is a checkbox labeled "Required". Below this field are three radio buttons: USA (selected), Canada, and Other.
- customer.yearsAsCustomer**: This field contains the placeholder text "Provide the Label for input parameter customer.yearsAsCustomer". To its right is a checkbox labeled "Required".

At the bottom right of the form are three buttons: Cancel, Publish (disabled), and Save as draft.

Action 2.3.4 Enter ‘Customer name’ in the **customer.name** field.



The screenshot shows the same skill configuration page as the previous one, but the 'customer.name' input field now contains the text "Customer name". This text is highlighted with a red border. The other fields and their configurations remain the same as in the first screenshot.

Narration: The same procedure is applied for the remaining fields. The output parameters are also customized in the same way.

Action 2.3.5 Click the **Output** tab.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Enhance the "New XXX FocusCorp customer service." skill' page. The 'Output' tab is selected, highlighted with a red box. The interface displays three sections: 'purchase.warrantyType', 'purchase.returnReason', and 'purchase.condition'. Each section has a dropdown menu with several options. At the bottom right are 'Cancel', 'Publish', and 'Save as draft' buttons.

Narration: In this scenario, we only need to specify the column headers of the table that contains the decision fields returned by ODM.

Action 2.3.6 Click Edit response.

The screenshot shows the 'Edit response' section of the skill enhancement page. It includes a note about Watson responding to input, a 'Watson says' section with a response, and a table with columns labeled 'DecisionID', 'decision.returnStatus', 'decision.refundAmount', 'decision.comments', 'decision.fee', 'decision.action', and 'decision.requestDate'. The 'Edit response' button is highlighted with a red box. At the bottom right are 'Cancel', 'Publish', and 'Save as draft' buttons.

Action 2.3.7 Type 'Return decision' in the **decision.returnStatus** header field.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Output' tab of a skill configuration in IBM Watson Orchestrate. The 'Name' is 'XXX_FC_CustomerService'. The 'Input' section lists fields: title, Return decision, title, title, title, title, title. The 'Output' section lists fields: title, decision.returnStatus, decision.refundAmount, decision.comments, decision.fee, decision.action, decision.requestDate. Below the table, there's an 'Edit response' section with a 'Table' tab selected. A red box highlights the 'Return decision' dropdown, and a red arrow points to the 'decision.returnStatus' dropdown in the table below it. At the bottom right are 'Cancel', 'Publish', and 'Save as draft' buttons.

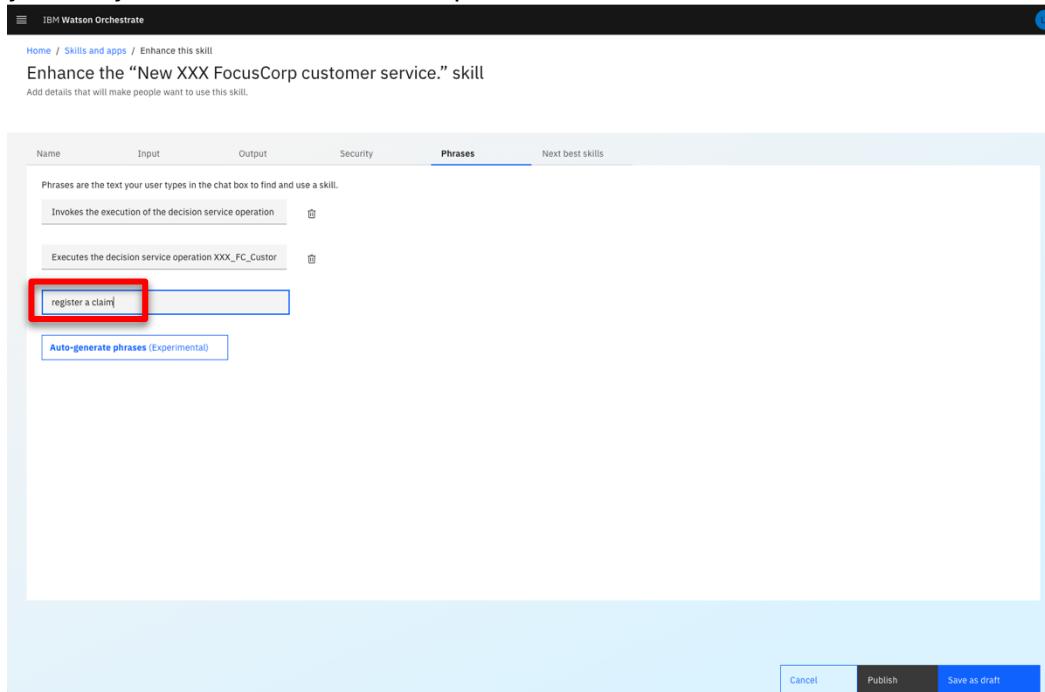
Narration: The same procedure is applied for the remaining output fields. We have already prepared a fully configured skill that we'll see in a couple of minutes. Next, we are specifying the phrases orchestrate will use to train the NLP engine.

Action 2.3.8 Click the Phrases tab.

The screenshot shows the 'Phrases' tab of a skill configuration in IBM Watson Orchestrate. The 'Name' is 'XXX_FC_CustomerService'. The 'Input' section lists fields: title, Return decision, title, title, Shipment fee, Next action, Decision date. The 'Output' section lists fields: title, decision.returnStatus, decision.refundAmount, decision.comments, decision.fee, decision.action, decision.requestDate. Below the table, there's an 'Edit response' section with a 'Table' tab selected. A red box highlights the 'Phrases' tab in the top navigation bar. At the bottom right are 'Cancel', 'Publish', and 'Save as draft' buttons.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

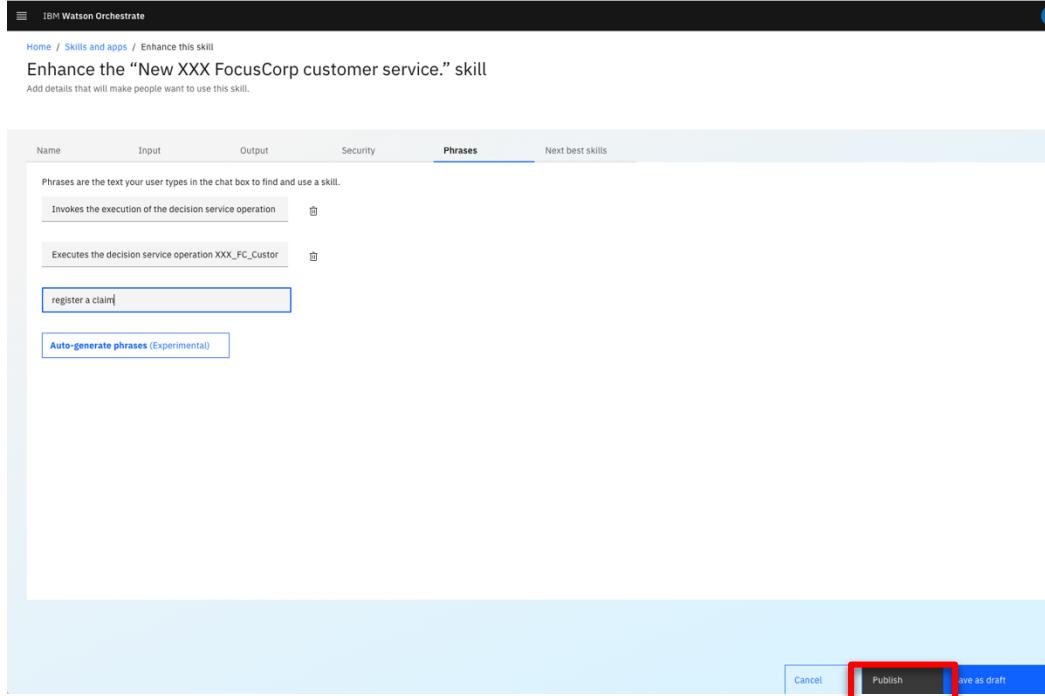
Action 2.3.9 Type ‘register a claim’ as a new phrase. Press the enter/return key on your keyboard to save the new phrase.



The screenshot shows the 'Phrases' tab of the IBM Watson Orchestrate interface. The input field contains the phrase 'register a claim'. The 'Publish' button at the bottom is highlighted with a red box.

Narration: Our skill is now published in the watsonx Orchestrate catalog. Users are now able to add it to their personal skill sets.

Action 2.3.10 Click **Publish**.



The screenshot shows the 'Phrases' tab of the IBM Watson Orchestrate interface. The input field contains the phrase 'register a claim'. The 'Publish' button at the bottom is highlighted with a red box.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. A green notification bar at the top right indicates a successful publication: 'Published successful Published skill. 12:11:59'. Below the header, there's a search bar labeled 'Find a skill'. The main area displays a table of skills:

Name	Description	Step in the process	Status	Skill type
Watson translator	Translates text from one langu...	Just 1 step away to be ready	Ready to publish	Imported
CT Execute MAH-Recommend-produ...	CT Execute MAH-Recommend-produ...	Ready to use	Published	Automation
Execute retention-offer	Execute retention-offer	Ready to use	Published	Automation

2.4 Add the customer service skill to your personal skills

Narration: We can now add this new skill into our personal catalog.

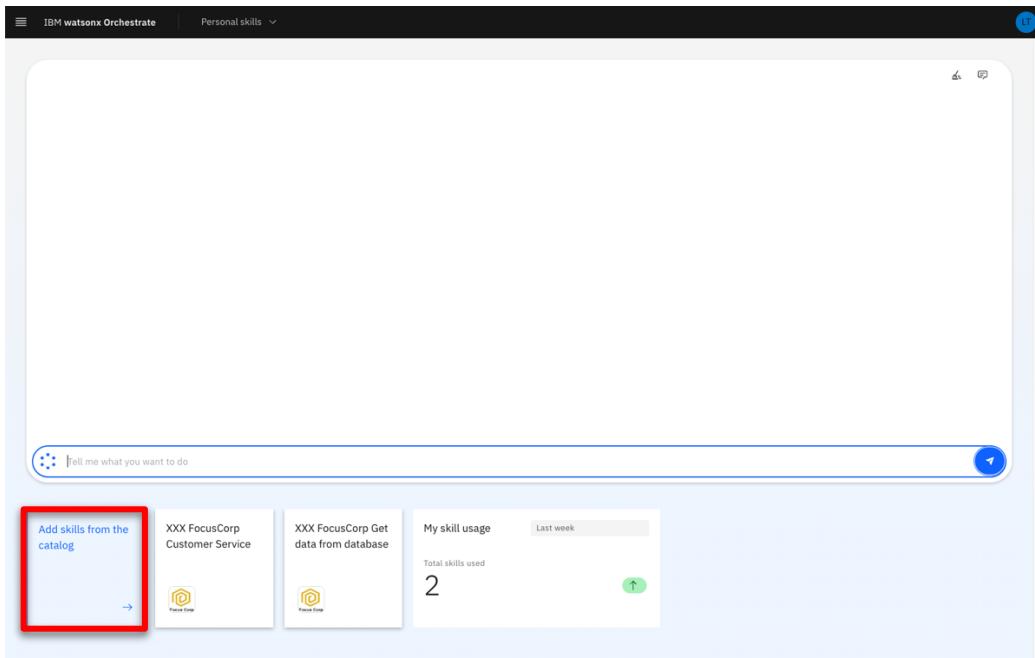
Action 2.4.1 Click Home

The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. The 'Home' link in the breadcrumb navigation is highlighted with a red box. A green notification bar at the top right indicates a successful publication: 'Published successful Published skill. 12:11:59'. Below the header, there's a search bar labeled 'Find a skill'. The main area displays a table of skills:

Name	Description	Step in the process	Status	Skill type
Watson translator	Translates text from one langu...	Just 1 step away to be ready	Ready to publish	Imported
CT Execute MAH-Recommend-produ...	CT Execute MAH-Recommend-produ...	Ready to use	Published	Automation
Execute retention-offer	Execute retention-offer	Ready to use	Published	Automation

Action 2.4.2 Click Add skills from the catalog.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



Action 2.4.3 Type your ‘XXX’ in the search field (‘XXX’ being your own initials).

The screenshot shows the 'Skill catalog' page. At the top, there's a search bar with 'xxx' typed into it, highlighted by a red box. Below the search bar, there are sections for 'Most popular skills' and 'All Apps'. Under 'Most popular skills', there are three cards: 'Send an email', 'Create a lead', and 'Send an email using Outlook'. Under 'All Apps', there are several grid items, including 'Box', 'XXX FocusCorp_Get_Data...', 'XXX FocusCorp_Customer...', and 'Test Get Invoice Doc...'. The 'XXX FocusCorp_Customer...' item has a red box around its card.

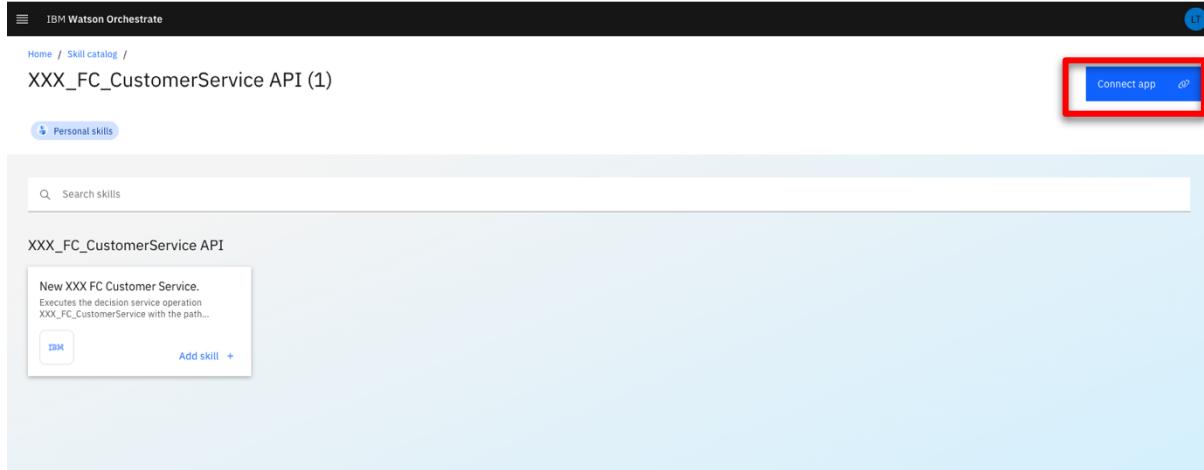
Action 2.4.4 Click your ‘XXX_FC_CustomerService_API’ (‘XXX’ being your own initials).

The screenshot shows the 'Skill catalog' page after performing a search for 'xxx'. The search bar at the top now contains 'xxx'. In the 'Apps' section, there are three cards: 'XXX FocusCorp_Get_Data_Fro...', 'XXX FocusCorp_Customer_Ser...', and 'XXX_FC_CustomerService API'. The third card, 'XXX_FC_CustomerService API', is highlighted with a red box.

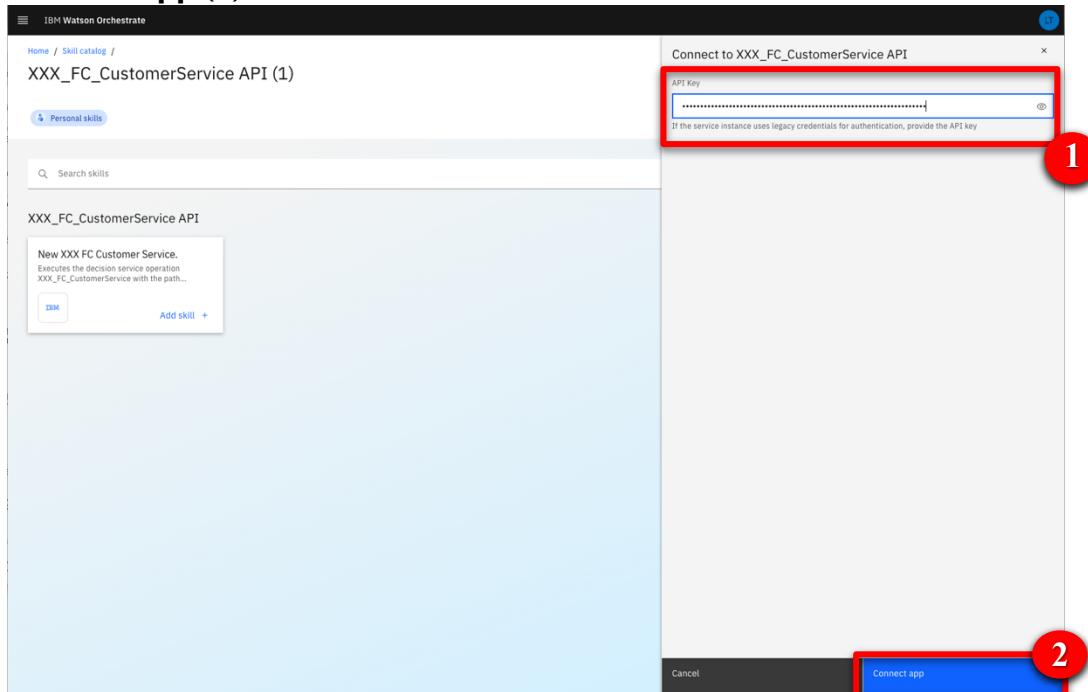
ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Narration: Next, we'll connect the skill to the Rule Execution Server. We'll use the ZEN API key that was provided by our ODM administrator to connect to the deployed rule service.

Action 2.4.5 Click Connect app.



Action 2.4.6 Enter the **ZEN API KEY (1) you copied in your notebook - click **Connect app** (2).**



Narration: The skill is connected, and we can now add it into our personal catalog.

Action 2.4.7 Click **Add skill +.**

ODM and wxOODM demonstration for CP4BA 23.0.1 DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Skill catalog' page for 'XXX_FC_CustomerService API (1)'. At the top right, there is a 'Connected' status indicator with a red arrow pointing to it. In the center, there is a box containing the text: 'New XXX FC Customer Service. Executes the decision service operation XXX_FC_CustomerService with the path...'. Below this box is a button labeled 'Add skill +', which is also highlighted with a red box.

Action 2.4.8 Check that your skill is added.

The screenshot shows the same 'Skill catalog' page after the skill has been added. The 'Connected' status indicator at the top right now shows a green circle with a checkmark. In the central skill card, the 'Added' status indicator is highlighted with a red box and a red arrow pointing to it.

Action 2.4.9 Click Home.

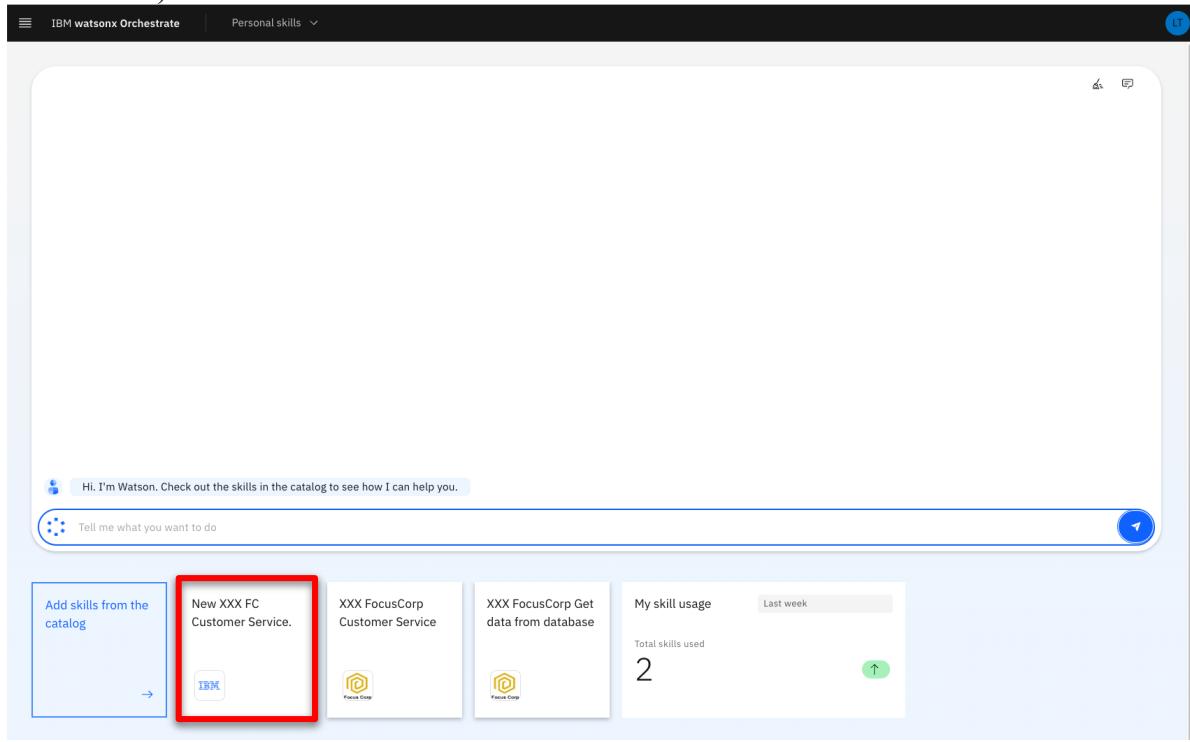
The screenshot shows the 'Skill catalog' page again. The 'Connected' status indicator at the top right is now green with a checkmark. The 'Home' link in the breadcrumb navigation is highlighted with a red box and a red arrow pointing to it.

2.5 Show the customer service skill

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Narration: The new skill is now listed in our personal skills list. In one click, we can invoke it.

Action 2.5.1 Click the **New XXX FocusCorp customer service** tile ('XXX' being your own initials).



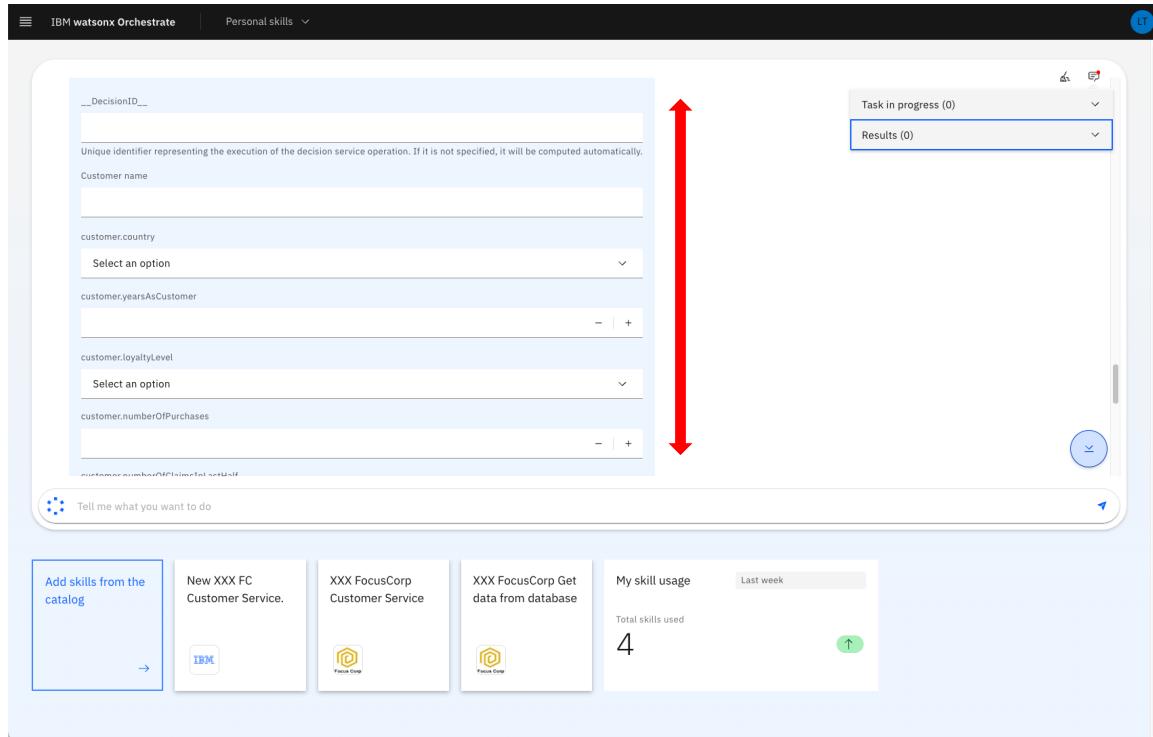
Narration:

With ODM, the decisions require different input data describing the customer and the item to be returned. It would take too much time for an agent to fill all these fields manually. For this reason, we are going to create a composite skill that will get all the customer and item information from the FocusCorp database.

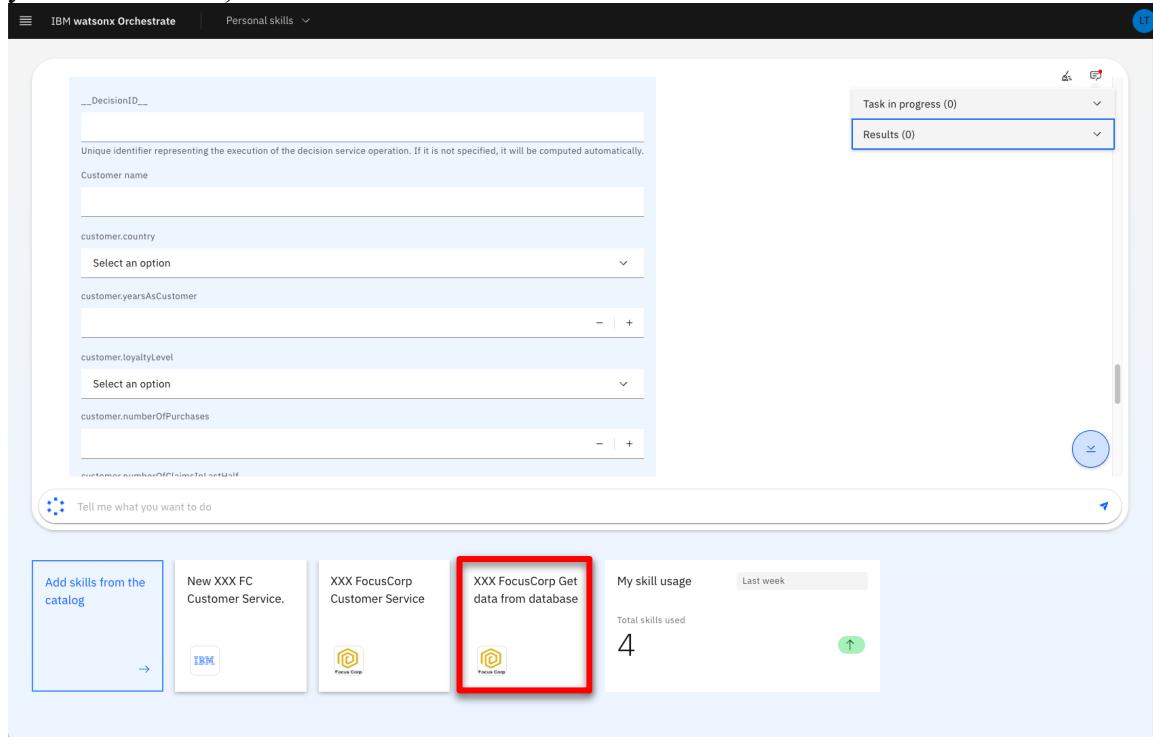
FocusCorp has created a skill that is able to retrieve customer and item information from the database.

Action 2.5.2 Scroll through the set of required inputs.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



Action 2.5.3 Click the **XXX FocusCorp Get data from database** skill ('XXX' being your own initials).



Narration: Let's use a customer email and product identification number, just like a call center agent would do.

Action 2.5.4 Enter '**johnsmith@acme.com**' as **Customer email** (1)- Enter '**001**' as **Product identification number**(2)- Click '**Apply**' (3).

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the IBM Watsonx Orchestrate interface. A modal window titled "purchase.condition" is open, prompting the user to "Select an option". Below the modal, a message says "You just need to complete this form first." There are two input fields: "Customer email (ex. johnsmith@acme.com):*" containing "johnsmith@acme.com" and "Product identification number (ex. 001):*" containing "001". A red circle labeled "1" is over the first input field, and another red circle labeled "2" is over the second. At the bottom of the modal is a blue "Apply" button, which is also circled with a red "3".

Narration: The database skill has returned the customer and item details from the FocusCorp database. We can now use the database skill to feed the decision skill. To do so, we will create a composite skill.

Action 2.5.5 Scroll through the result to show the data recovered from the back-end system.

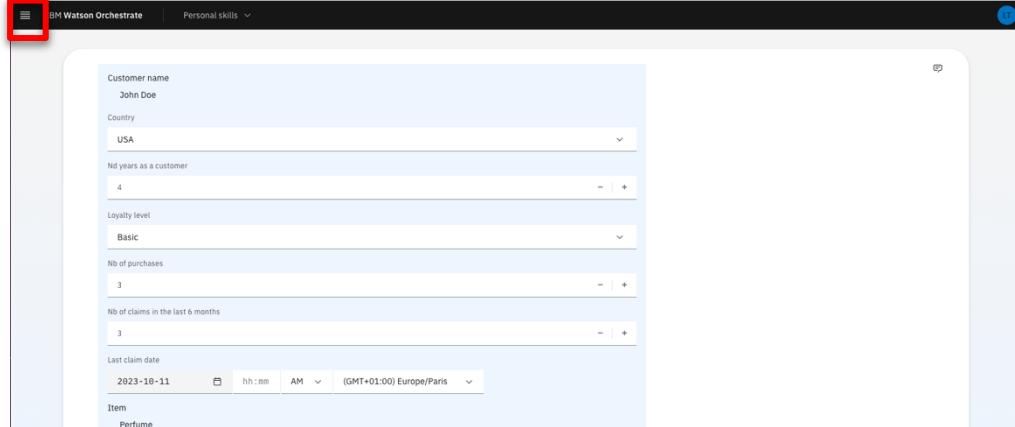
The screenshot shows the IBM Watsonx Orchestrate interface. A large vertical red double-headed arrow is positioned on the right side of the screen, pointing up and down between the main workspace and a results panel. The main workspace contains a form with fields for "Price" (80), "Purchase date" (2023-10-11), "Return reason" (Enter_a_reason), "Item condition" (Enter_a_condition), "Warranty (years)" (1), and "Warranty type" (Basic). The results panel on the right shows "Task in progress (0)" and "Results (0)". At the bottom, there is a skill catalog with four items: "Add skills from the catalog", "New XXX FC Customer Service.", "XXX FocusCorp Customer Service", and "XXX FocusCorp Get data from database". The "XXX FocusCorp Get data from database" skill is highlighted with a yellow background. A red circle labeled "5" is next to the "Total skills used" counter.

3- Sequencing skills into a composite skill

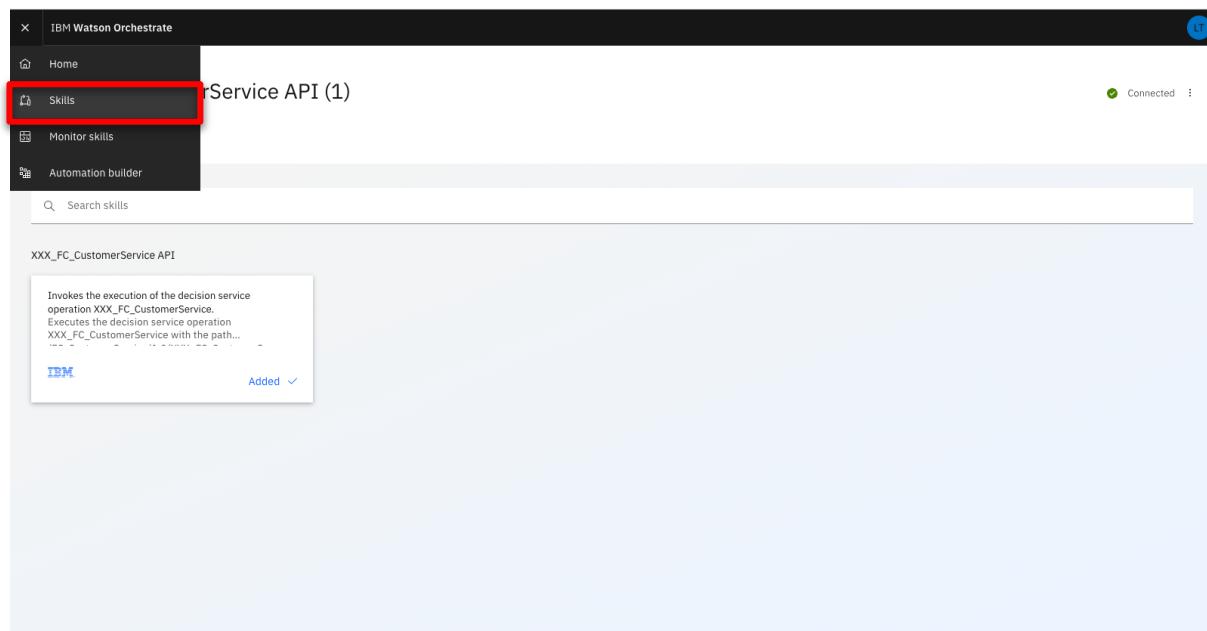
3.1 Create the customer service composite skill

Narration: Let's now work on this composite skill. As an automation builder, we can sequence multiple skills.

Action 3.1.1 Click the **hamburger icon**.



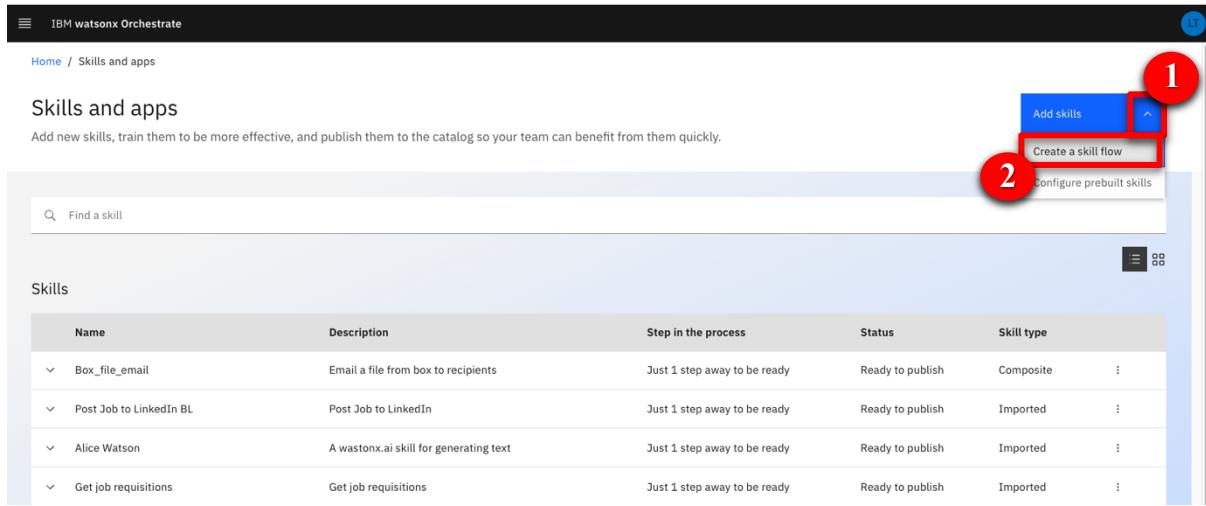
Action 3.1.2 Click **Skills**.



Action 3.1.3 Expand the **Add skills** menu (1). Click '**Create a skill flow**' (2)

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

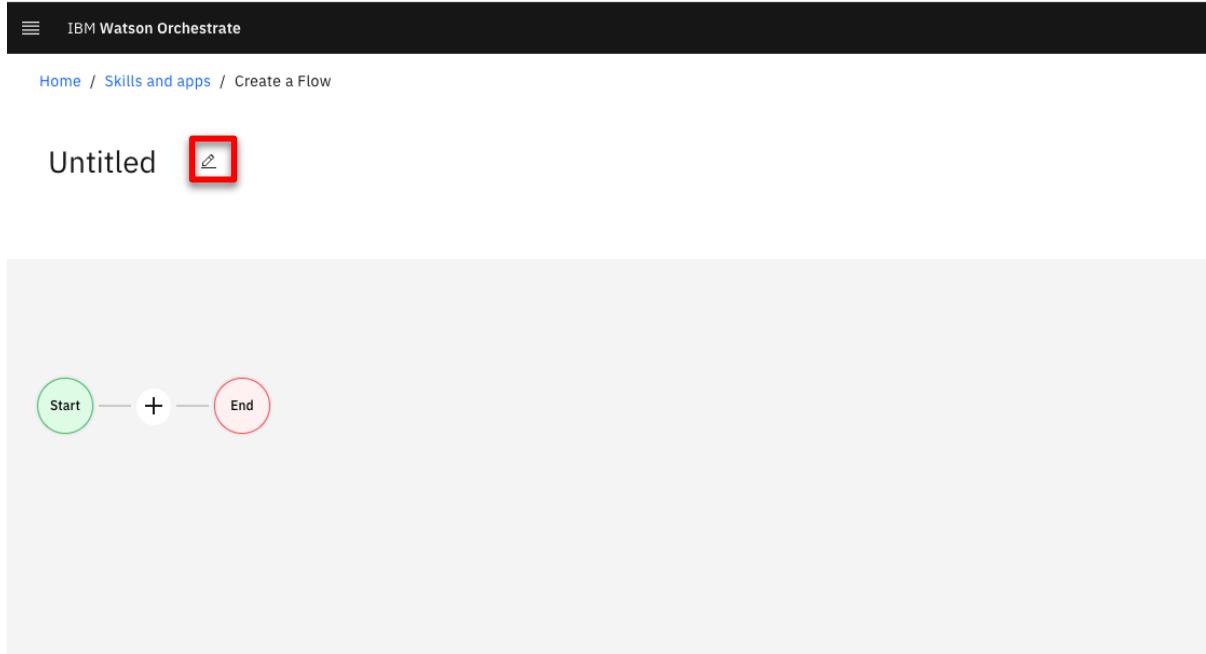


The screenshot shows the 'Skills and apps' section of the IBM Watson Orchestrate interface. At the top right, there are three buttons: 'Add skills' (highlighted with a red box and circled '1'), 'Create a skill flow' (highlighted with a red box and circled '2'), and 'Configure prebuilt skills'. Below these buttons is a search bar labeled 'Find a skill'. The main area displays a table of skills:

Name	Description	Step in the process	Status	Skill type
Box_file_email	Email a file from box to recipients	Just 1 step away to be ready	Ready to publish	Composite
Post Job to LinkedIn BL	Post Job to LinkedIn	Just 1 step away to be ready	Ready to publish	Imported
Alice Watson	A wastonx.ai skill for generating text	Just 1 step away to be ready	Ready to publish	Imported
Get job requisitions	Get job requisitions	Just 1 step away to be ready	Ready to publish	Imported

Narration: The first step is to give a name and description to the skills so that users can easily recognize it in the catalog.

Action 3.1.4 Click the pencil icon to name the skill flow.



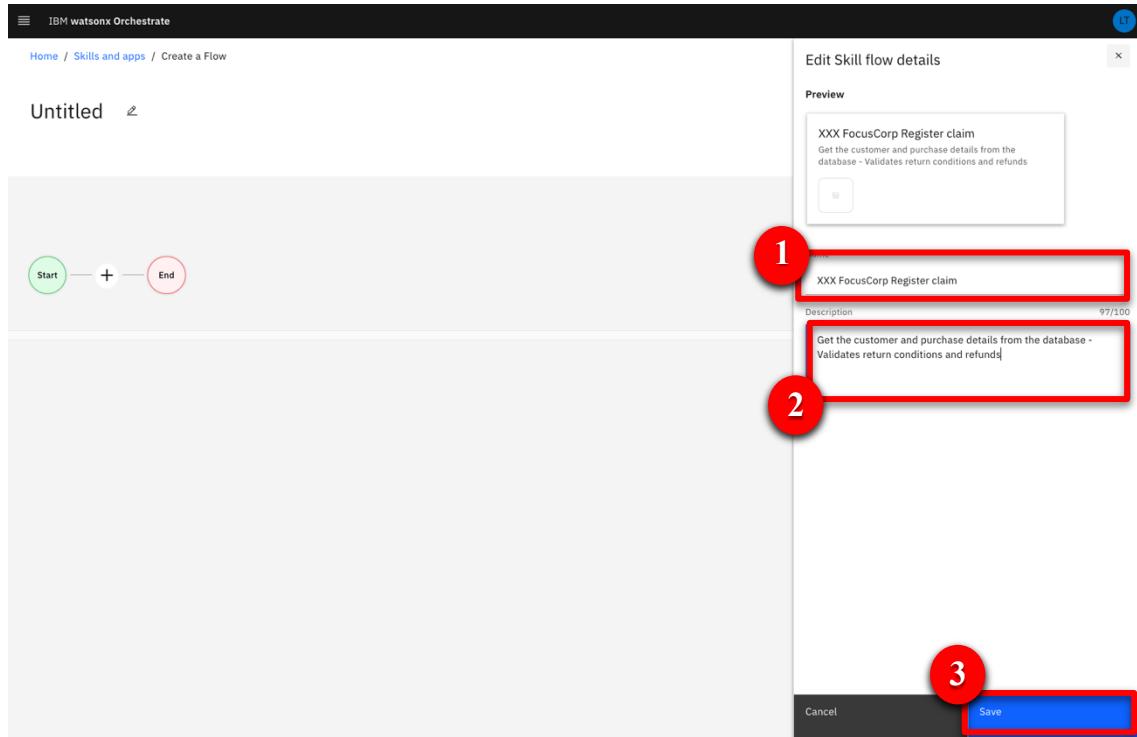
The screenshot shows the 'Create a Flow' screen. At the top left, it says 'Untitled' with a pencil icon (highlighted with a red box). Below this is a large empty workspace. At the bottom left, there are three circular icons: 'Start' (green), '+', and 'End' (red).

Narration: The description will help the users to understand the actions performed by the composite skill.

Action 3.1.5 Enter a skill name that contains your 'XXX' initials(e.g. '**XXX FocusCorp Register claim**') (1). In the description field, enter '**Get the customer and purchase details from the database - Validates return conditions and refunds**' (2). Click **Save** (3).

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE



Narration: Next, we must add the two skills we need for this flow. The first one will collect the data from the database. The second one, which we created from the ODM deployment, will analyze the data and return a decision.

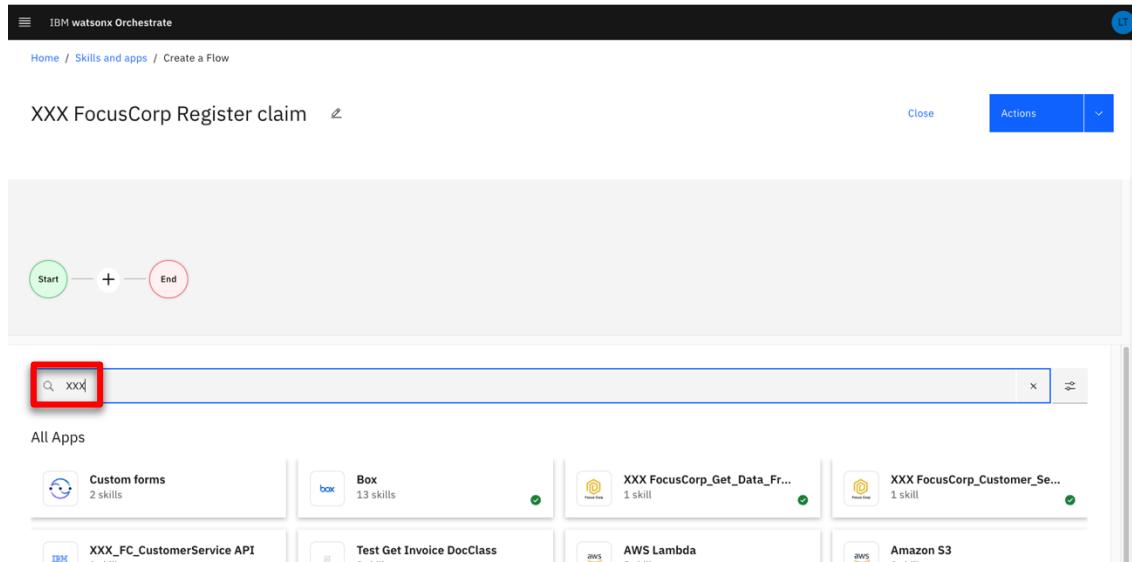
Action 3.1.6 Click the + button.



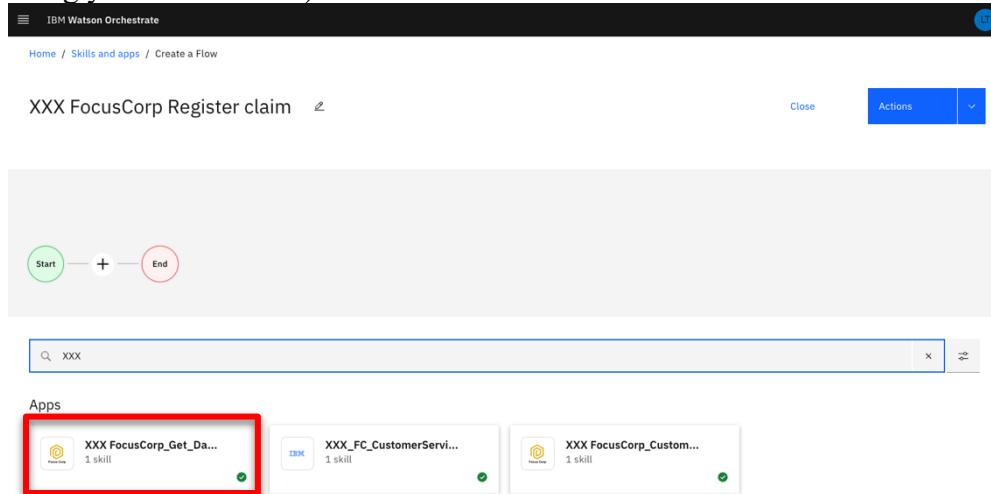
Narration: Let's search for the skills we have added in our personal skills.

Action 3.1.7 Search for 'XXX' to find all your skills from the catalog ('XXX' being your own initials)

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



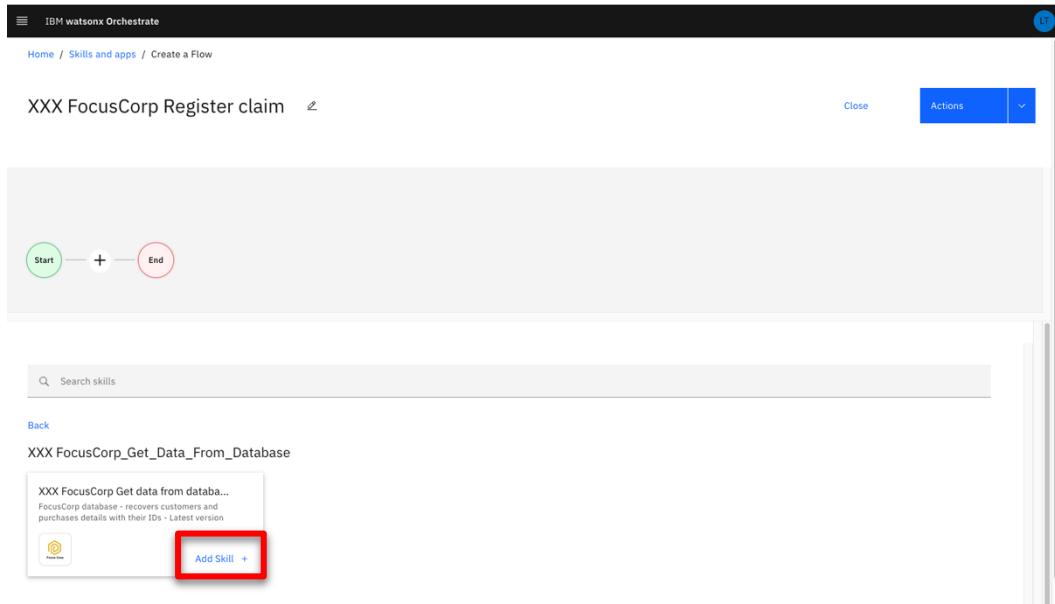
Action 3.1.8 Click the **XXX FocusCorp_Get_Data_from_database** skill ('XXX' being your own initials).



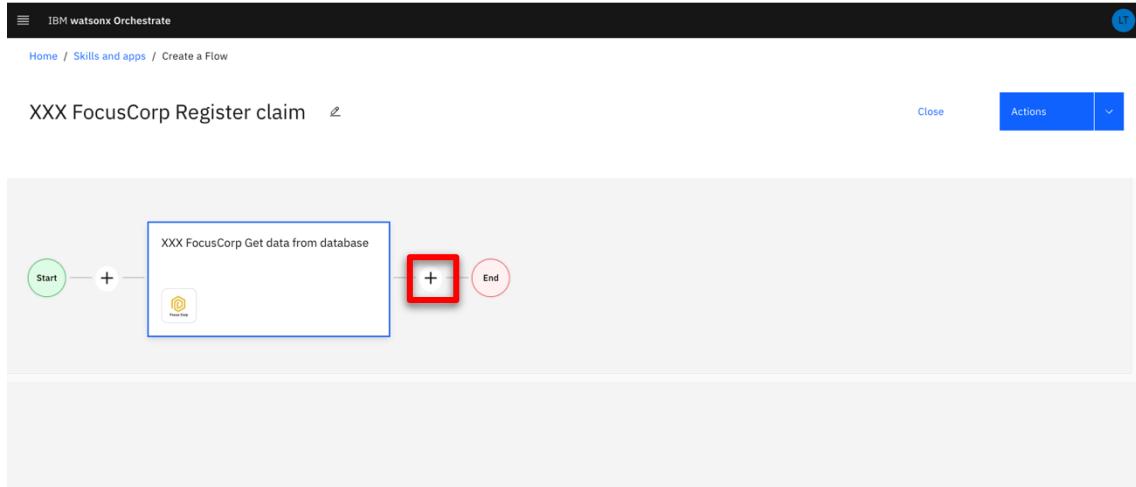
Narration: We can add the database skill to the flow.

Action 3.1.9 Click the **Add skill +**.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



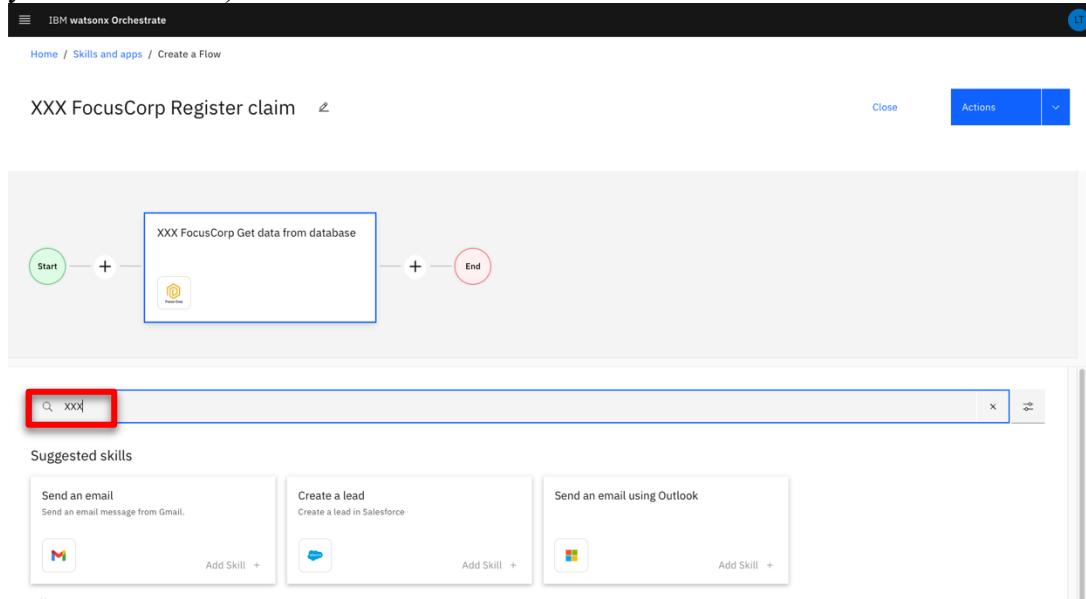
Action 3.1.10 Click + button.



Narration: Next, let's search for the decision skill.

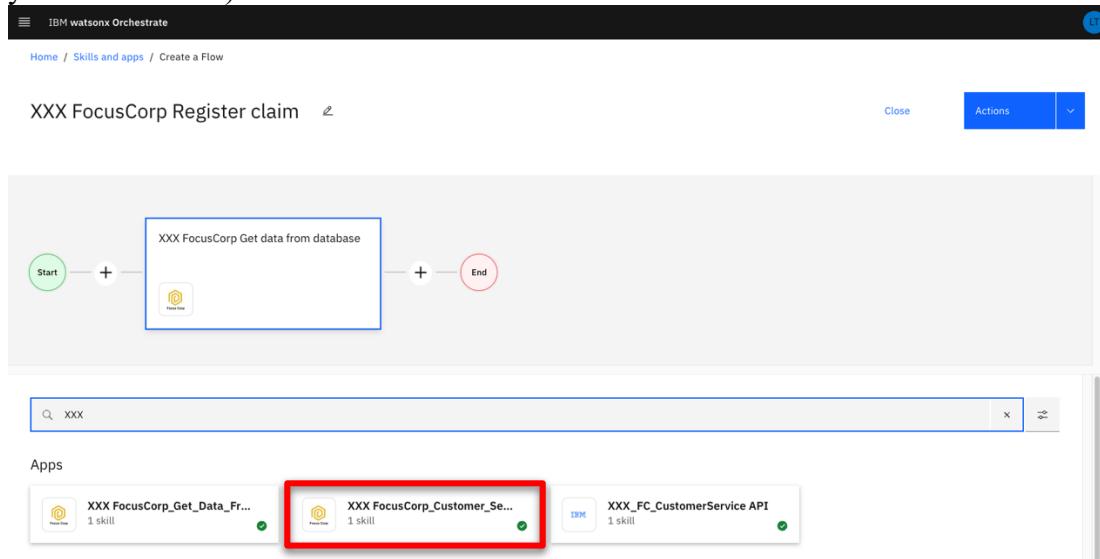
ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 3.1.11 Search for ‘XXX’ to find all your skills from the catalog (‘XXX’ being your own initials).



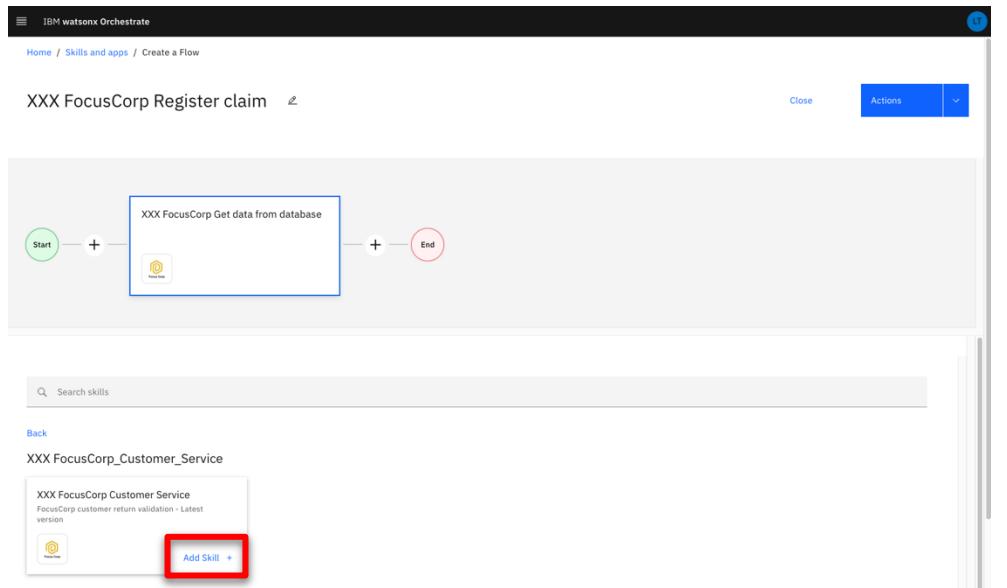
Narration: To save time, we will use a pre-configured version of the decision skill (available for download in the prep tab).

Action 3.1.12 Click the ‘XXX FocusCorp_Customer_Service’ skill (‘XXX’ being your own initials).

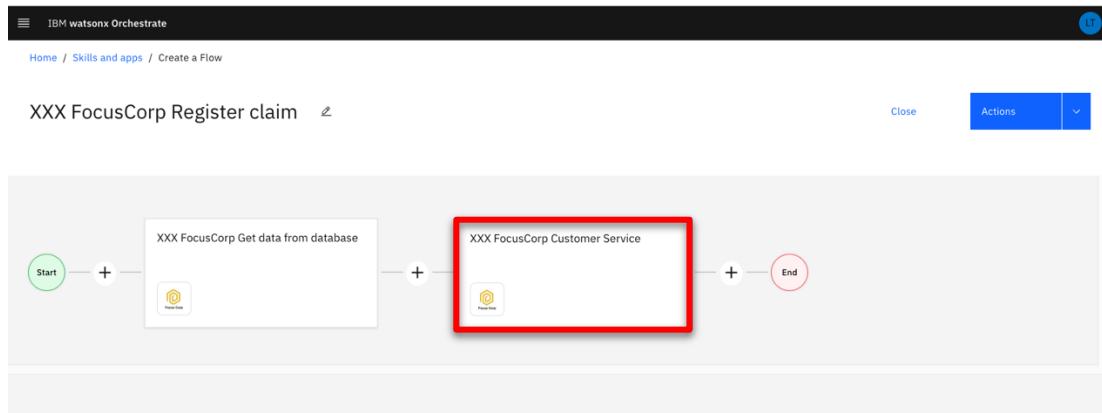


Action 3.1.13 Click **Add skill +**.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE



Action 3.1.14 Click second skill in the flow.

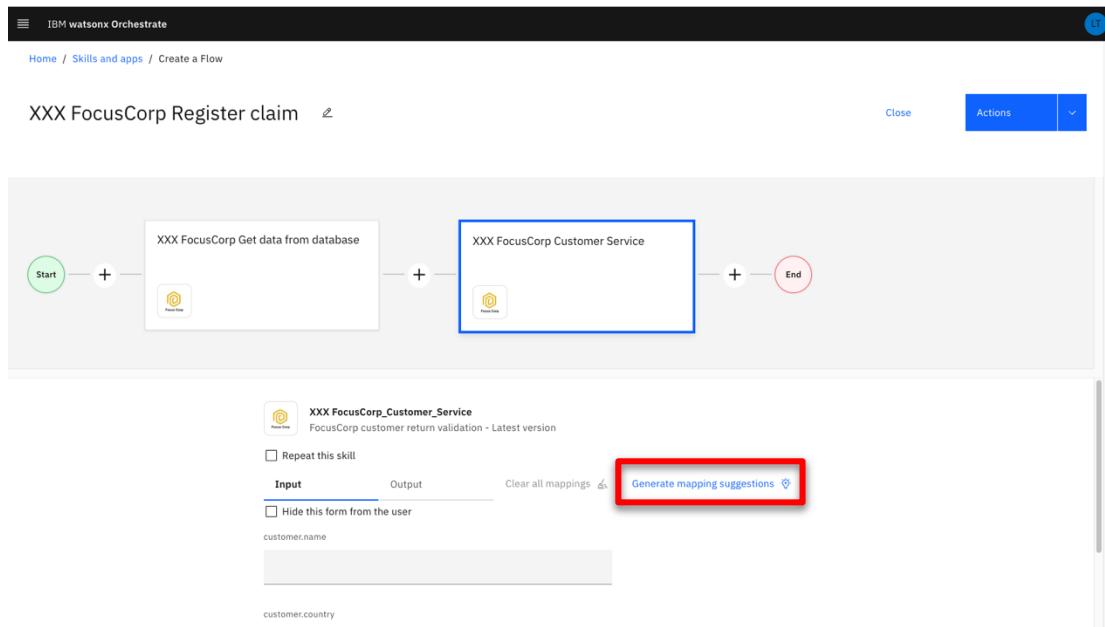


Narration: The two skills are now sequenced in the flow. Next, we must map the output parameters of the database skill to the input fields of the decision skill. This operation can be automated using Watsonx Orchestrate's intelligent mapping capability. Orchestrate is able to suggest a mapping based on attributes, names and types.

Action 3.1.15 Click **Generate mapping suggestions**.

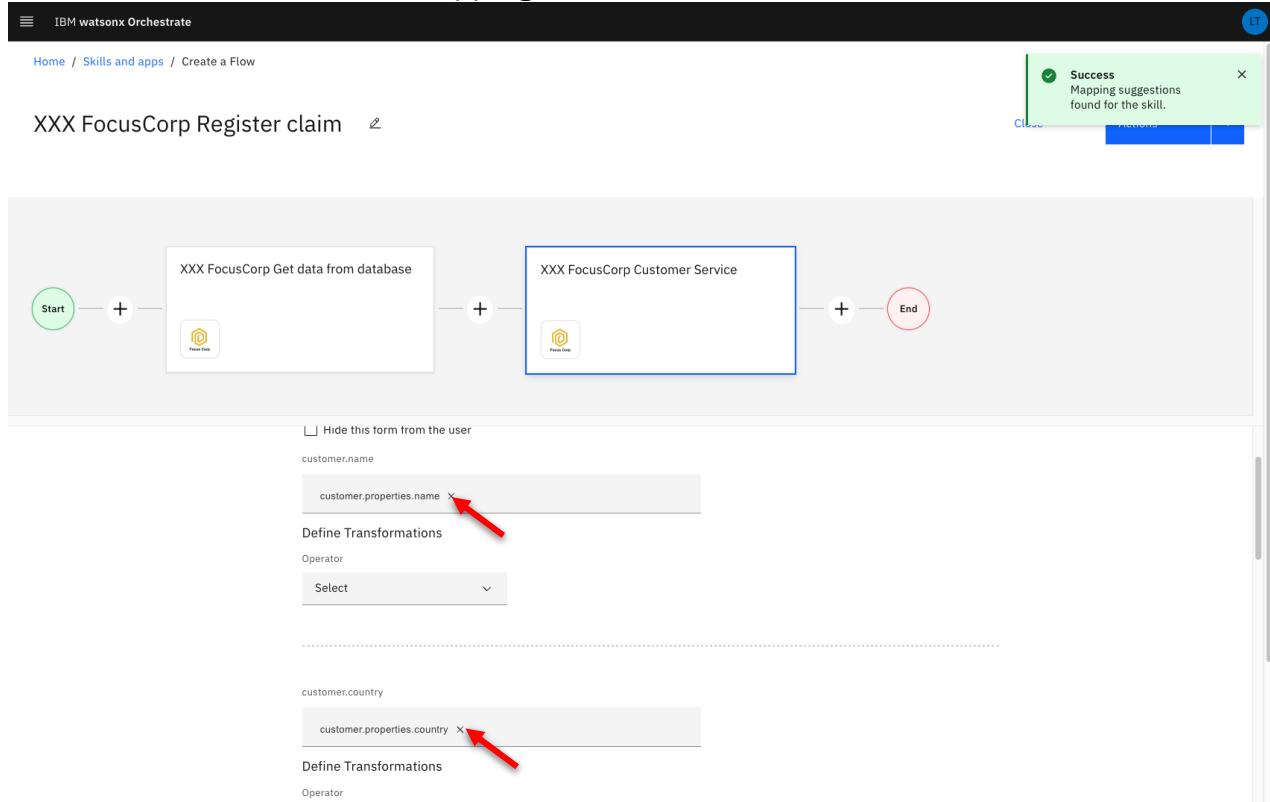
ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE



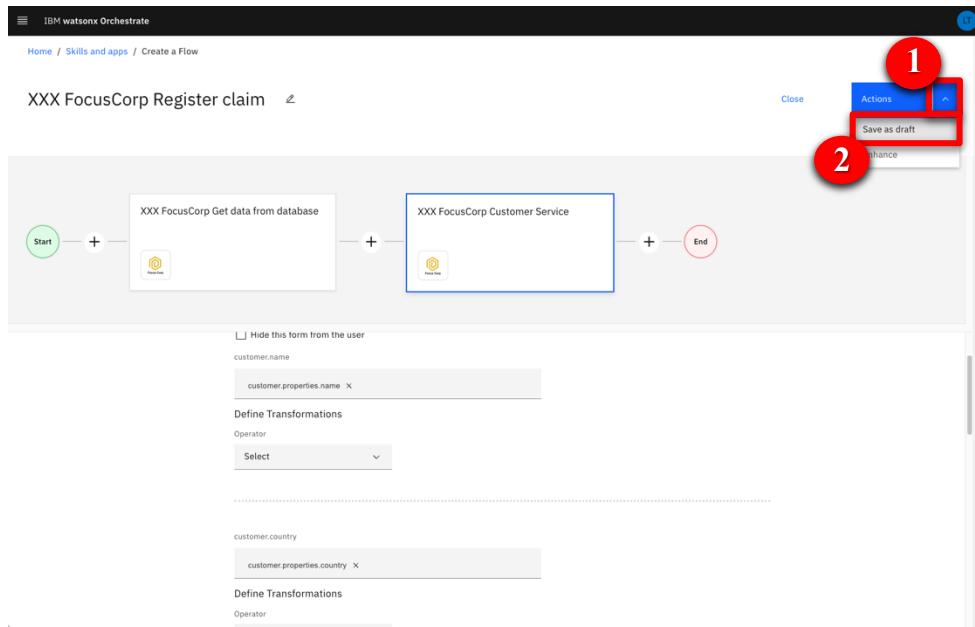
Narration: We can see all the attributes are correctly mapped between the two skills in just a single click. No additional action is required. We can now save the skill to add it to the catalog, as well as publish it to users.

Action 3.1.16 Point out the mapping.



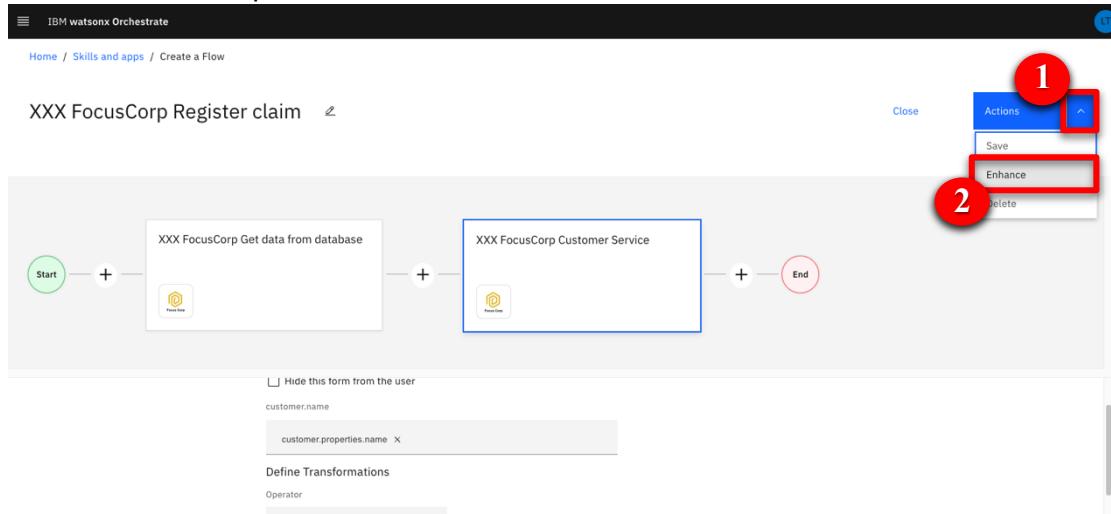
Action 3.1.17 Expand the Actions menu (1) – Click Save as draft (2)

ODM and wxOODM demonstration for CP4BA 23.0.1 DRAFT VERSION – DO NOT DISTRIBUTE



Narration: Let's now enhance the skill by adding some phrases that will be used to invoke the skill in the chat interface of watsonx Orchestrate.

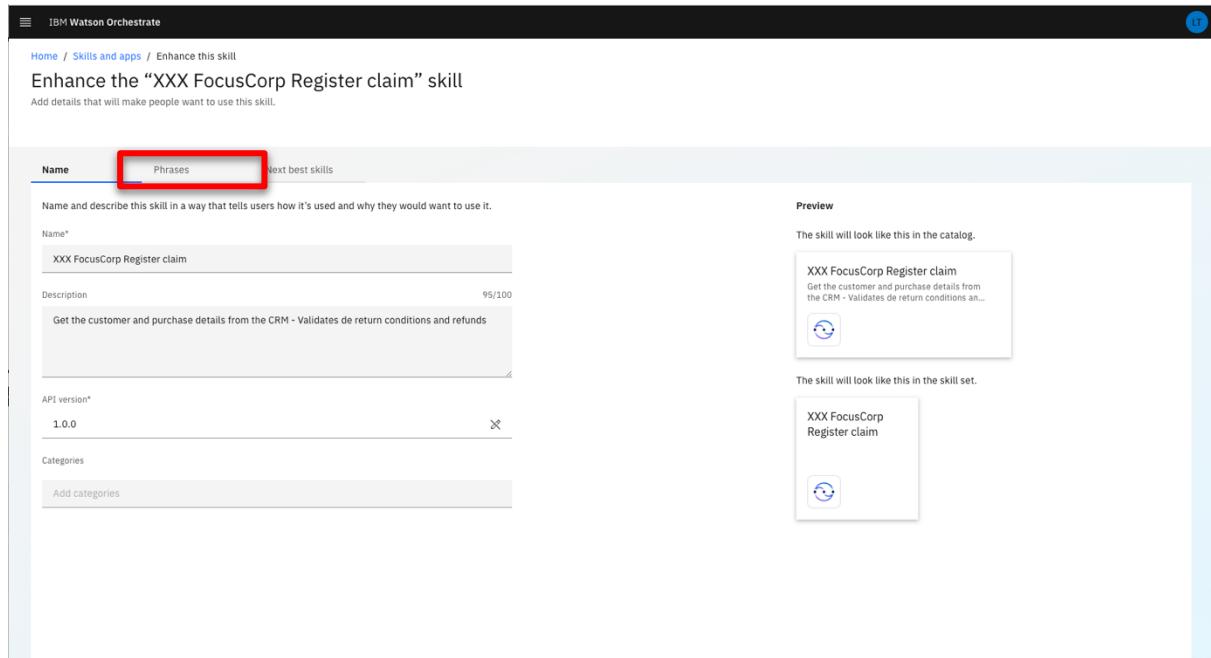
Action 3.1.18 Expand the Actions menu (1) – Click Enhance (2)



Action 3.1.19 Click Phrases.

ODM and wxOODM demonstration for CP4BA 23.0.1

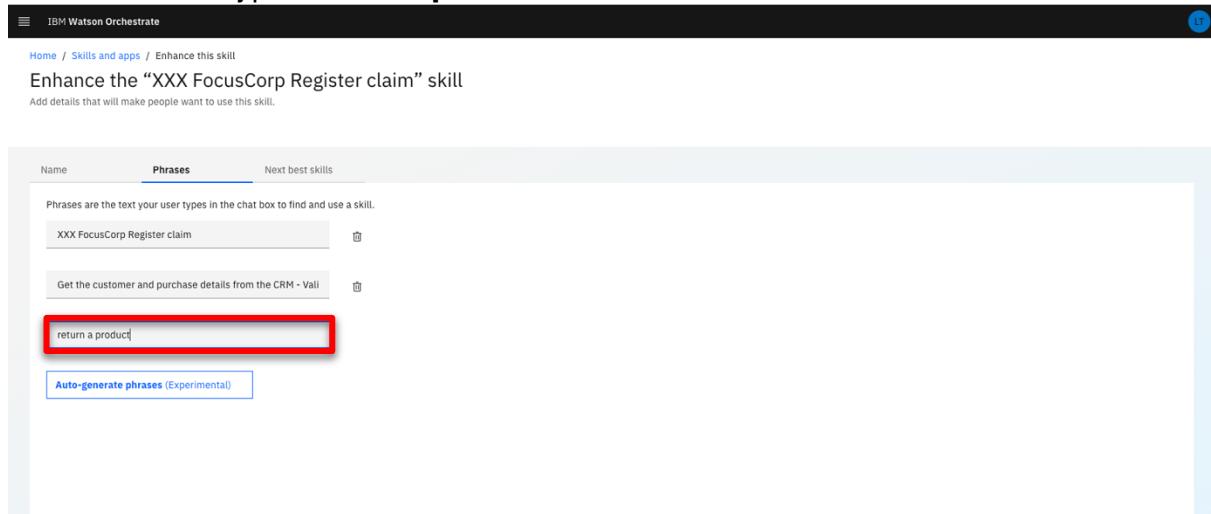
DRAFT VERSION – DO NOT DISTRIBUTE



The screenshot shows the 'Enhance the “XXX FocusCorp Register claim” skill' page in IBM Watson Orchestrate. The 'Phrases' tab is active, indicated by a red box around its label. In the main content area, there is a text input field containing the phrase 'return a product'. To the right, there are two preview sections: one for the catalog and one for the skill set, both showing the skill's details and a small icon.

Narration: We can add for instance ‘return a product’ to the training set. Many more phrases can be added to improve the NLP training.

Action 3.1.20 Type ‘return a product’.



The screenshot shows the same 'Enhance the “XXX FocusCorp Register claim” skill' page in IBM Watson Orchestrate. The 'Phrases' tab is active, and a red box highlights the input field containing 'return a product'. Below the input field, there is a button labeled 'Auto-generate phrases (Experimental)'.

Narration: Our skill is ready to be published. Just by entering ‘return a product’ in the chat interface, watsonx Orchestrate will understand that this skill should be used.

Action 3.1.21 Click Publish.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

Name **Phrases** Next best skills

Phrases are the text your user types in the chat box to find and use a skill.

XXX FocusCorp Register claim

Get the customer and purchase details from the CRM - Vali

return a product

Enter new train phrase

Auto-generate phrases (Experimental)

Cancel **Publish** Save as draft

Action 3.1.22 Type Home.

Home / Skills and apps

Skills and apps

Add new skills, train them to be more effective, and publish them to the catalog so your team can benefit from them quickly.

Find a skill

Skills

Name	Description	Step in the process	Status	Skill type
XXX FocusCorp Register claim	Get the customer and purchase ...	Ready to use	Published	Composite
Watson translator	Translates text from one langu...	Just 1 step away to be ready	Ready to publish	Imported
CT Execute MAH-Recommend-produ...	CT Execute MAH-Recommend-produ...	Ready to use	Published	Automation
Execute retention-offer	Execute retention-offer	Ready to use	Published	Automation
Composite with decision	Composite with decision	Ready to use	Published	Composite
HelloWorldLCT	HelloWorldLCT	Ready to use	Published	Imported
ODM CP4BA OnPrem Invokes the e...	Executes the decision service ...	Ready to use	Published	Imported
Vacation approval	Vacation approval	Ready to use	Published	Imported
alice skill flow from cluster		Just 1 step away to be ready	Ready to publish	Composite
Draft - Vacation Evaluation	Eligibility to evaluate the va...	Ready to use	Published	Composite

Items per page: 10 1–10 of 151 items 1 of 16 pages

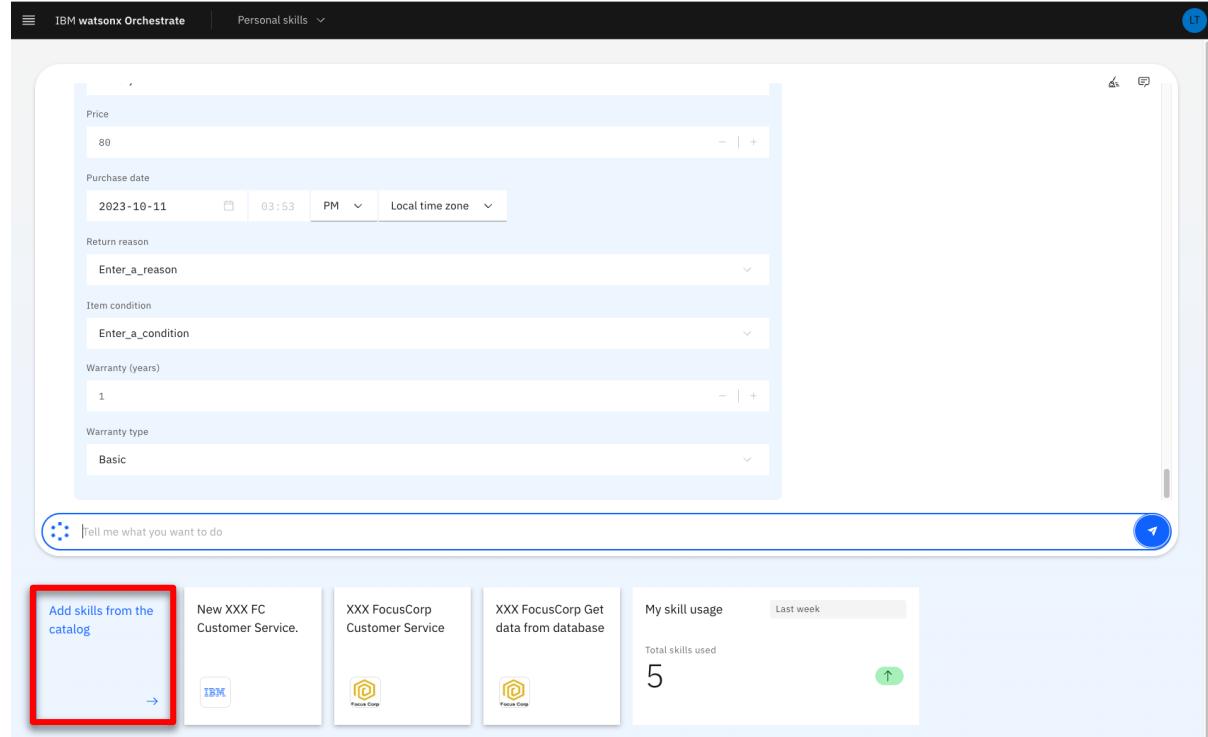
4- Using the new skill in the call center

4.1 Add the customer service composite skill

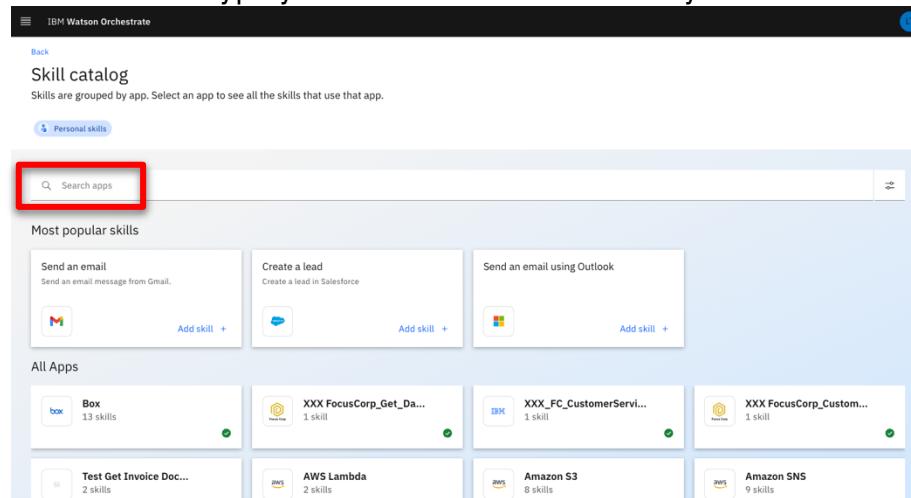
ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Narration: Since we are using a shared environment for this demonstration, we'll need to add the composite skill to our personal skillset. In a real life situation, the skill would be added to the team skillset so that any call center agent could easily access it.

Action 4.1.1 Click Add skills from the catalog.



Action 4.1.2 Type your 'XXX' initials to find all your skills from the catalog.



Action 4.1.3 Click the Composite tile.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the 'Skill catalog' page in IBM Watson Orchestrate. At the top, there's a search bar with the placeholder 'Back' and a search icon. Below it, a message says 'Skills are grouped by app. Select an app to see all the skills that use that app.' A button labeled 'Personal skills' is visible. The main area is titled 'Apps' and contains four items: 'XXX FocusCorp_Get_Data...' (1 skill), 'XXX_FC_CustomerServic...' (1 skill), 'XXX FocusCorp_Custom...' (1 skill), and 'Composite' (1 skill). The 'Composite' item is highlighted with a red box.

Action 4.1.4 Search for ‘XXX’ (‘XXX’ being your own initials).

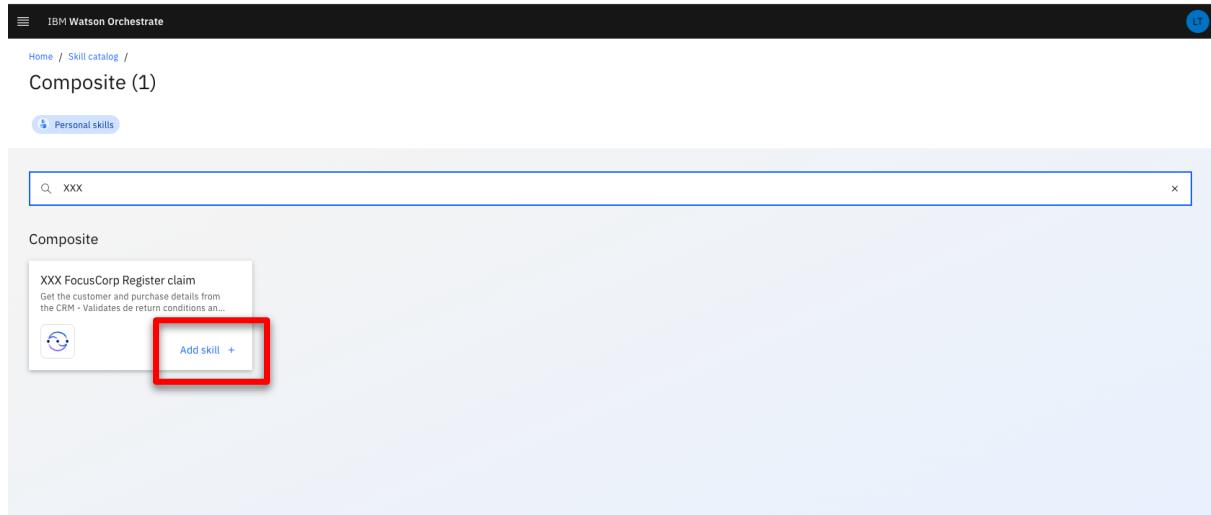
The screenshot shows the 'Composite' skill catalog page. At the top, there's a breadcrumb navigation: 'Home / Skill catalog / Composite (97)'. Below it, a search bar has 'xxx' typed into it and is highlighted with a red box. The main area is titled 'Composite' and displays a grid of 16 skill cards. Each card includes a thumbnail, the skill name, a brief description, and two buttons: 'Add skill +' and '+'. Some cards have additional icons or text below them.

Skill Name	Description	Add Skill Buttons
tecsa Onboarding flow	tecsa Onboarding flow for new hire	Add skill +
_SN_Job requisition and send for ap...	Job requisition and send for approval	Add skill +
Kyle's Generate and Email content	Test skill flow for watson orchestrate testing, created by Kyle Eli from the testing instruction...	Add skill +
Stellaonboardprocess	this is test onboard	Add skill +
ywsComposite	Test 4 on July 17th	Add skill +
Composite BAW, RPA, Decision - CT	Composite BAW, RPA, Decision - CT	Add skill +
Lu onboarding flow	Frank Lu on-boarding flow for new hire	Add skill +
ViewCandidatesLocation-Ray		Add skill +
Satya-Composite-3		
Get lists from Trello board and email ...		
test skill with & char		
Composite BAW and RPA - Andy Choi		

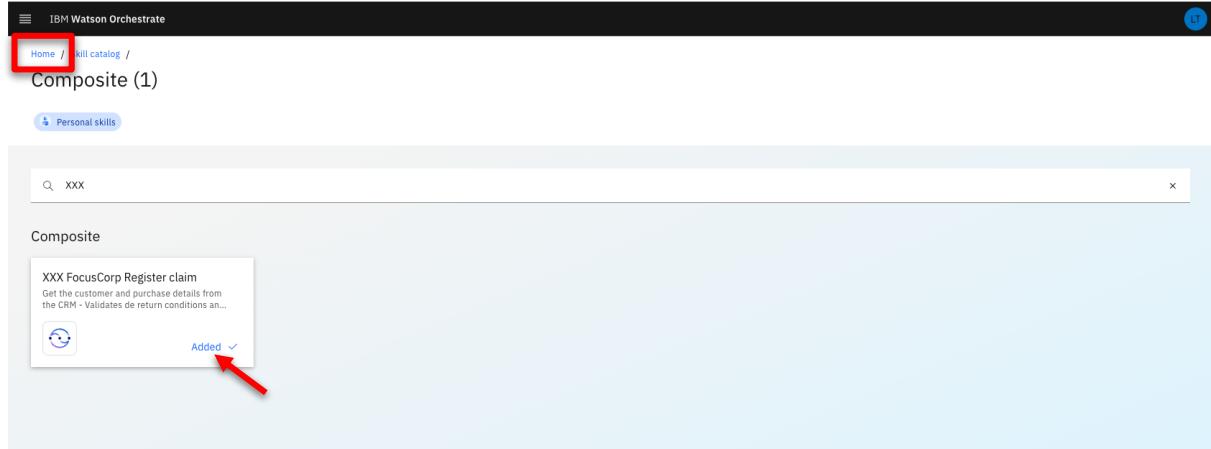
Action 4.1.5 Click Add skill +.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE



Action 4.1.6 Check that your skill is added. Click **Home**.



4.2 Use the customer service composite skill

Narration: We're now ready to use the composite skill.

Let's now assume the role of customer service agent who receives a call from a customer. We'll ask for their customer email and the identification number of the product they want to return.

Action 4.2.2 Type '**return a product**' and press the enter/return key on your keyboard.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there's a navigation bar with the title 'IBM Watsonx Orchestrate' and a dropdown menu labeled 'Personal skills'. Below the navigation bar is a large input form for returning a product. The form fields include: Purchase date (2023-10-11, 03:53 PM, Local time zone), Return reason (Enter_a_reason), Item condition (Enter_a_condition), Warranty (years) (1), and Warranty type (Basic). Below the form, a message from Watson says 'Hi. I'm Watson. Let's get to work.' followed by a red box around the 'return a product' button. At the bottom of the screen, there's a footer with various skill cards and a 'My skill usage' section showing 5 total skills used last week.

Action 4.2.3 Enter ‘**alexgreen@acme.com**’ as **Customer email** (1). Enter ‘**001**’ as **Product identification number** (2). Click ‘**Apply**’ (3).

This screenshot shows the same interface as the previous one, but with the 'Customer email' field populated with 'alexgreen@acme.com' (marked with a red circle 1) and the 'Product identification number' field populated with '001' (marked with a red circle 2). The 'Apply' button at the bottom of the form is also highlighted with a red circle 3. The rest of the interface remains the same, including the Watson message and the skill usage summary at the bottom.

Narration: The customer is now telling us the reasons why they’re returning the product.

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

Action 4.2.4 For the **Return reason** field, select **Arrived_late** (1). For the **Item condition** field, select **Opened** (2). Click **Show all fields** (3).

The screenshot shows a user interface for 'IBM Watsonx Orchestrate'. At the top, there's a navigation bar with 'IBM Watsonx Orchestrate' and 'Personal skills'. Below the navigation is a form titled 'Warranty type' with a dropdown set to 'Basic'. A message says 'You just need to complete this form first.' Below it is a section for 'Return reason' with a dropdown menu containing 'Arrived_late' (circled in red with number 1). Next is 'Item condition' with a dropdown menu containing 'Opened' (circled in red with number 2). At the bottom right of this section is a blue button labeled 'Show all fields' (circled in red with number 3). Below the form, there's a search bar with 'Tell me what you want to do' and a list of cards: 'Add skills from the catalog', 'XXX FocusCorp Register claim', 'New XXX FC Customer Service.', 'XXX FocusCorp Customer Service', 'XXX FocusCorp Get data from database', and 'My skill usage' (Last week: Total skills used 5).

Narration: All the other required fields have been automatically pre-filled, saving us a lot of time.

Action 4.2.5 Point out the other fields .

This screenshot shows a detailed customer profile form. At the top, it says 'Alex Green'. The form includes fields for 'Country' (USA), 'Nb of years as customer' (10, highlighted with a red arrow), 'Loyalty level' (Gold), 'Total nb of purchases' (30, highlighted with a red arrow), 'Nb of claims in the past 6 months' (2), and 'Last claim date' (2023-08-09). Below the form is a search bar with 'Tell me what you want to do' and a list of cards: 'Add skills from the catalog', 'XXX FocusCorp Register claim', 'New XXX FC Customer Service.', 'XXX FocusCorp Customer Service', 'XXX FocusCorp Get data from database', and 'My skill usage' (Last week: Total skills used 5).

Action 4.2.6 Scroll down and click **Show fewer fields**'.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

The screenshot shows the IBM Watsonx Orchestrate interface. At the top, there are navigation icons and a search bar labeled "Tell me what you want to do". Below the search bar is a "Personal skills" dropdown. The main area displays a form for product registration:

- Category:** Beauty
- Price:** 80
- Purchase date:** 2023-10-11, 03:53 PM, Local time zone
- Warranty (in years):** 1
- Warranty type:** Basic

A red box highlights the "Show fewer fields" button. At the bottom of the form are "Cancel" and "Apply" buttons.

Below the form, there is a section titled "Add skills from the catalog" with a blue arrow icon. To the right, there are several cards representing different skills or services:

- XXX FocusCorp Register claim
- New XXX FC Customer Service.
- XXX FocusCorp Customer Service
- XXX FocusCorp Get data from database

On the far right, there is a "My skill usage" summary showing "Total skills used: 5" for the last week, with an upward arrow icon.

Action 4.2.7 Click Apply.

The screenshot shows the IBM Watsonx Orchestrate interface after the form has been submitted. The "Warranty type" field now shows "Basic". A message at the top says "You just need to complete this form first." Below the message, the "Return reason" field is set to "Arrived_late" and the "Item condition" field is set to "Opened". A red box highlights the "Apply" button at the bottom of the form.

Below the form, there is a section titled "Add skills from the catalog" with a blue arrow icon. To the right, there are several cards representing different skills or services:

- XXX FocusCorp Register claim
- New XXX FC Customer Service.
- XXX FocusCorp Customer Service
- XXX FocusCorp Get data from database

On the far right, there is a "My skill usage" summary showing "Total skills used: 5" for the last week, with an upward arrow icon.

Narration: In one click, the ODM decision service returns a decision and additional information, such as the refund amount or any required shipping fees. All these results have been dynamically calculated by the rules we saw at the beginning of this scenario.

Note: You can execute the demonstration with different combination of users (cf. highlighted emails bellow) and items (See highlighted product numbers bellow) to show the different decision outcomes.

ODM and wxOODM demonstration for CP4BA 23.0.1

DRAFT VERSION – DO NOT DISTRIBUTE

Customer email ↑↓	Name ↑↓	Country ↑↓	Years as customer ↑↓	Loyalty ↑↓	NB Purchase ↑↓	NB Claims ↑↓	Last return date ↑↓
johnsmith@acme.com	John Smith	USA	4	Basic	3	3	Oct 11, 2023
mikebrown@acme.com	Mike Brown	Canada	6	Gold	6	5	Aug 3, 2023
lisacarter@acme.com	Lisa Carter	USA	1	Basic	10	9	Oct 17, 2023
alexgreen@acme.com	Alex Green	USA	10	Gold	30	2	Aug 9, 2023
marymiller@acme.com	Mary Miller	Other	2	Platinum	100	5	Oct 12, 2023
Otherwise	Jane Doe	Other	10	Platinum	5	0	Oct 12, 2023

Product number ↑↓	Description ↑↓	Price ↑↓	Category ↑↓	Purchase date ↑↓	Item condition ↑↓	Return reason ↑↓	Warranty type ↑↓	Warranty duration ↑↓
001	Perfume	80	Beauty	Oct 11, 2023	Enter a condition	Enter a reason	Basic	1
002	The Little Prince	50	Books	Sep 4, 2020	Enter a condition	Enter a reason	Basic	2
003	T-Shirt-BLUE-XL	100	Clothing	May 19, 2023	Enter a condition	Enter a reason	Lifetime	2
004	Fish and chips	500	Grocery	Oct 20, 2018	Enter a condition	Enter a reason	Basic	0
005	Work bench	1,500	Tools	Jul 13, 2023	Enter a condition	Enter a reason	Extended	3
Otherwise	Other Purchase	1,000	Tools	Oct 4, 2023	Enter a condition	Enter a reason	Basic	5

Action 4.2.8 Point out the decision results.

The screenshot shows the 'Return decision' screen in the IBM Watsonx Orchestrate interface. The decision status is 'Accepted'. The refund amount is listed as 6.4. The shipping fee is listed as 8.279. A comment below states: 'The return is accepted - Gold loyalty shipping discount: 2.6% - Shipping fee: 8.5 - Refund rate: 80.0%'. A red arrow points to the 'Refund' button at the bottom of the form. The interface includes a navigation bar with 'IBM watsonx Orchestrate' and 'Personal skills', and a footer with various skill cards and usage statistics.

Summary

In this demo, we saw how a company uses IBM Watsonx Orchestrate to leverage and expose existing ODM decision services in new ways.

We used the Watsonx Orchestrate discovery service to connect to a production ODM execution server environment, and used the discovery service to create a new skill that invokes these rule-based decisions. We created a composite skill that orchestrates a sequence of skills, mapping their respective inputs and outputs

ODM and wxOODM demonstration for CP4BA 23.0.1
DRAFT VERSION – DO NOT DISTRIBUTE

automatically. Finally, we used Watsonx Orchestrate NLP to invoke this composite application using chat interface.

Watsonx Orchestrate belongs to a new intelligent generation of tools that leverages your existing IBM Automation assets to reuse them in modern, scalable, and easy-to-use environments.

Thank you for attending today's presentation.