

IBM Business Automation and Digital Labor Hands-On Labs

IBM watsonx Orchestrate IT Accessory Hub Scenario End-to-End Demo

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1 Introduction

This lab represents a simplified version of a unique solution (called IT Accessory Hub) for **Focus Corp** employees to **order IT accessories**, which is part of the wider procurement domain. Although intended to be realistic, it is fictitious, simplified, and meant to showcase key aspects of IBM watsonx Orchestrate (wxO) easily and quickly.

This scenario highlights selected capabilities across wxO and showcases how combining these capabilities can build an end-to-end business solution that helps automate, simplify, and accelerate work.

This lab focuses on the business user experience of ordering IT accessories, not developing the solution itself. Other labs are available that examine how the IT Accessory Hub solution is built.

1.1 IBM watsonx Orchestrate

IBM watsonx Orchestrate (wxO) is a generative AI and automation solution designed to help businesses automate tasks, simplify complex processes, and save time and effort. It provides a catalog of prebuilt apps and skills, a conversational chat experience, and a low-code builder studio to create scalable AI assistants and agents.

To learn more about IBM watsonx Orchestrate, click [here](#). To see the technical documentation, click [here](#).

1.2 Business scenario

Focus Corp has an enterprise-wide procurement system based on a packaged application. It can be used to purchase a wide variety of goods, including both consumable goods and capital goods.

Focus Corp allows employees to order computer accessories, such as mice, keyboards, headsets, and more. However, using the corporate procurement system is often overwhelming for employees who rarely use it and are no procurement experts. Ordering a simple and relatively cheap computer accessory item can be time-consuming. Errors happen when completing the required information, and employees even try to find ways to order the items they need outside the usual process.

In the current process, the requester's manager must review and approve each order, which is not always necessary. Additionally, Focus Corp has recently introduced several policies that define overall yearly spending limits for each employee and item category. These rules are only documented in the Intranet but are not supported by the procurement system.

Expense Eligibility and Limits

There is a cumulative total limit of \$400 US dollars (USD) per year. When purchasing eligible items, you're expected to select items that don't exceed the cost guidelines outlined in the table below. All amounts are listed in USD and should be converted to local currency. Ultimately, Managers are responsible for approving IT peripherals spent in alignment with business unit (BU) spending guidelines.

These categories and limits are established as a result of a global assessment and benchmark analysis.

All IT peripherals not listed in the allowed categories are, by default, not allowed. Follow your procurement process and purchase items via [Buy@Focus Corp](#) or [Buy on Demand \(BOND\)](#).

For exception requests, email the Finance IT Approver [REDACTED]

Product category	Spend limit for all Countries (USD equivalent unless otherwise stated)
Mouse	\$70
Keyboard	\$90
Monitor	\$200

Further challenges arise when ordering items not in the catalog. This manual process involves completing Excel spreadsheets and exchanging emails with various stakeholders.

A recent survey at Focus Corp resulted in a task force that summarized the expectations for a more streamlined and user-friendly ordering experience for such standard IT accessory items:

- **Employees** requested a modern, easy-to-use interface for requesting standard tools without complexity.
- **Managers** requested that they not be involved with standard orders. They only want to focus on exception cases and have an easy-to-use interface to make business decisions.
- **Procurement specialists** requested improved support when ordering items not listed in the catalog. Requesting and assessing quotes should be simple, and requesting approvals should be integrated.
- **Everybody** wants the company policies to be embedded into the ordering experience.

Focus Corp's management had initially tasked the IT department with developing a dedicated ordering experience for such standard IT accessory items. Yet, they responded that they could not implement a streamlined solution. They have budget and capacity restrictions, and expect customizing the packaged application to be difficult and expensive, which may lead to additional issues during future upgrades.

The task force launched the idea of using IBM Watson^x Orchestrate to implement the IT Accessory Hub solution for Focus Corp to provide a superior user experience and operational cost reductions without needing to customize the packaged application:

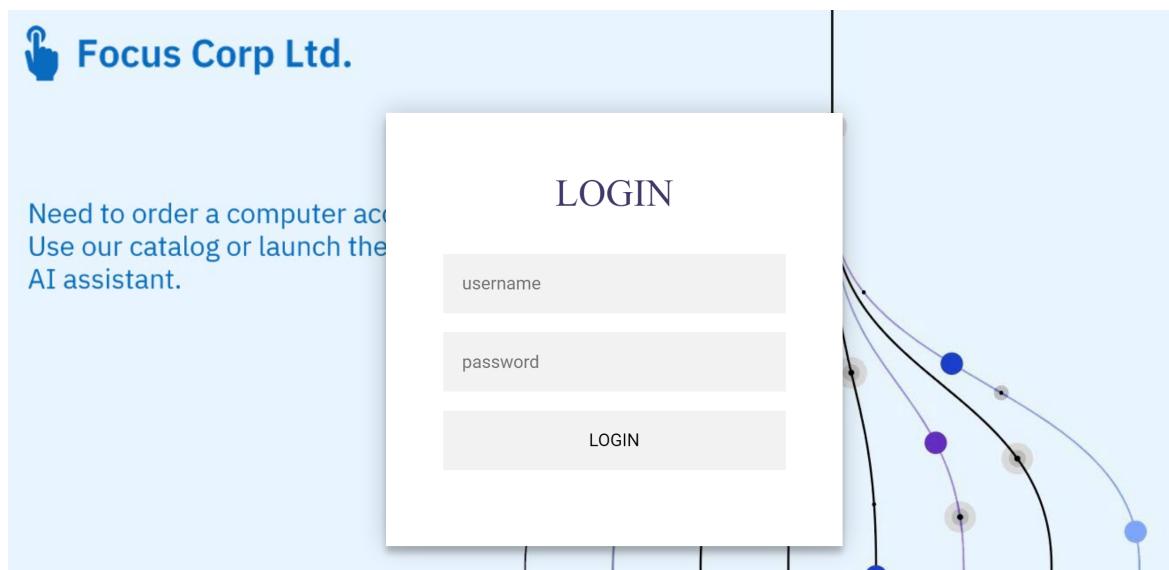
- **Employees** will use wxAI Assistant. The AI Assistant guides users through the ordering process, advises on company policies, and helps them make informed choices.
- **Managers** do not need to get involved with standard orders. They can focus on exception cases, making decisions based on the company's business needs and financial situation.
- **Procurement specialists** use an AI-assisted process to automate the purchase of non-catalog accessories, including the AI-assisted processing of quote documents.
- **Everyone** will benefit from the IT Accessory Hub automatically applying the current company guidelines, including tracking spending per employee and item category.

If you are interested in the IT Accessory Hub solution architecture, please refer to one of the other labs.

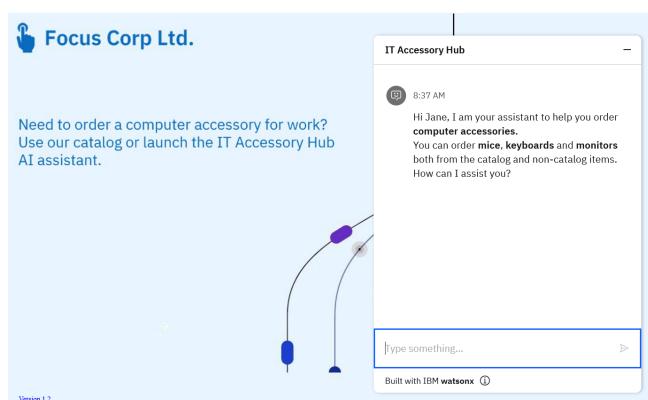
2 Lab setup instructions

2.1 Login to IT Accessory Hub

- _1. In your web browser, open the **IT Accessory Hub** using the **ibm.biz** link provided to you.
- _2. Enter the **username** and **password** you received for the **back-end services**, and then click **LOGIN** to log in.



The web page should look similar to this:



2.2 Login to IBM watsonx Orchestrate

- _1. In your web browser, open another tab and launch IBM watsonx Orchestrate using the link provided to you.
- _2. Enter your **IBM ID**, click **Continue**, enter your **password**, and click **Continue** again to log in.
- _3. If you have access to multiple tenants, please select the tenant that was shared with you as part of the event.

Log in to IBM Watson Orchestrate

Don't have an account? [Book a demo](#)

Continue with IBMID [Forgot ID?](#)

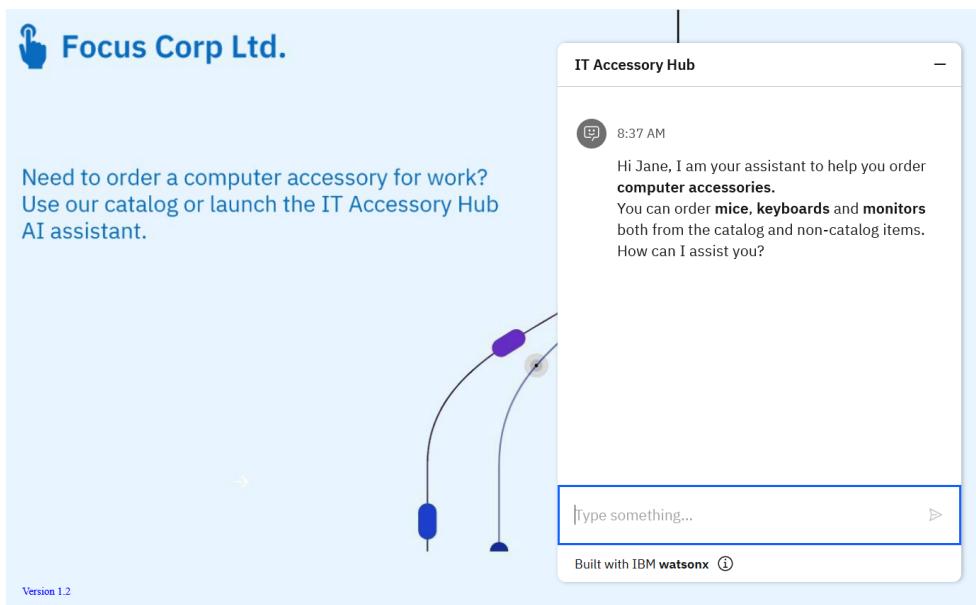
[Continue](#)

3 Exercise: Ordering an auto-approved mouse

3.1 Introduction

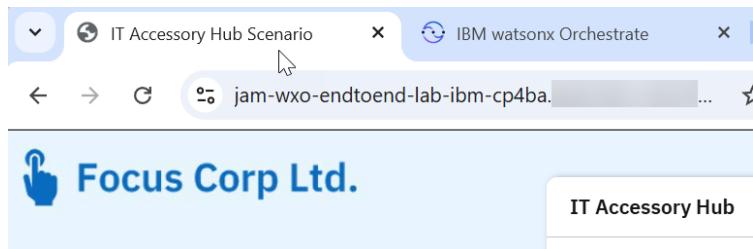
At the beginning of the year, Jane, one of Focus Corp's employees, needs to order a new mouse. Jane has always been happy with the brand she has used and wants to order the same brand again.

Focus Corp's IT Accessory Hub homepage offers to interact with the ordering system through an easy-to-use AI-powered assistant interface.

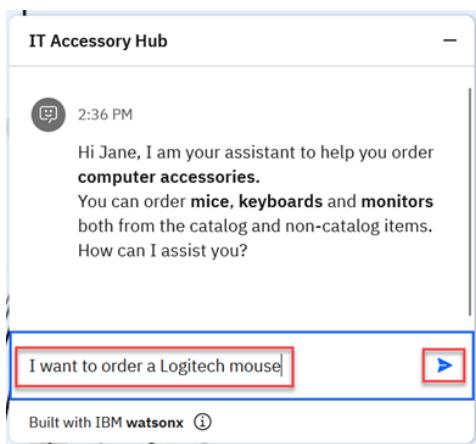


3.2 Step-by-step instructions

_1. In your browser, switch to the IT Accessory Hub homepage tab.

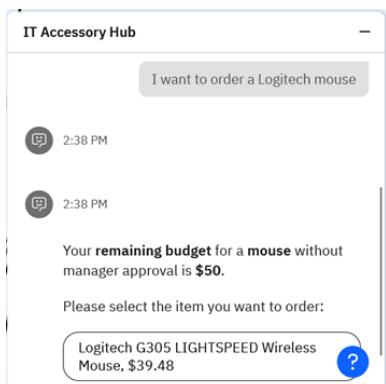


_2. In the Assistant window, type **I want to order a Logitech mouse**. Either press enter or click the blue arrow at the right of the chat window to submit your message.



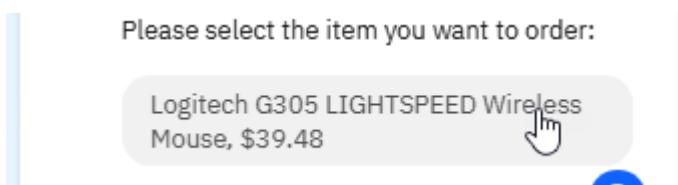
_3. You should see that a single mouse of the Logitech brand was found in the catalog.

If the Assistant informs you that the item was not found, a typo or character added when copy-pasting may be the reason. In this case, select the **Browse catalog for category: mouse** bubble and select the Logitech mouse from the list.

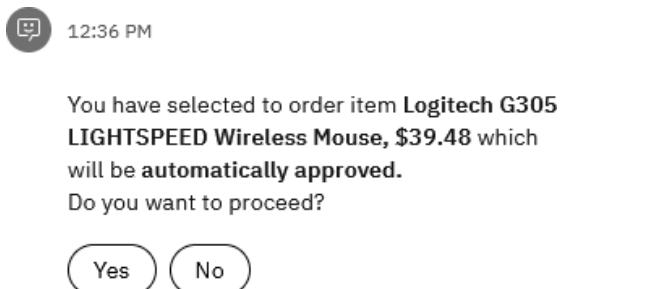


The Assistant communicates with the packaged application using its REST API to query information about the items in the catalog and the company policies. In this case, it informs the user that the remaining budget for a mouse without requiring manager approval is \$50.

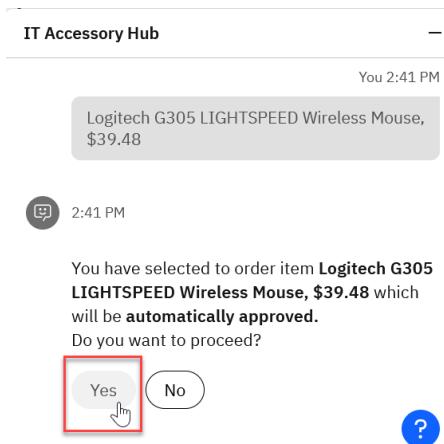
_4. Click on the bubble **Logitech G305 LIGHTSPEED Wireless Mouse** to order that item.



The Assistant summarizes what you want to order and asks for a final confirmation before placing the order.

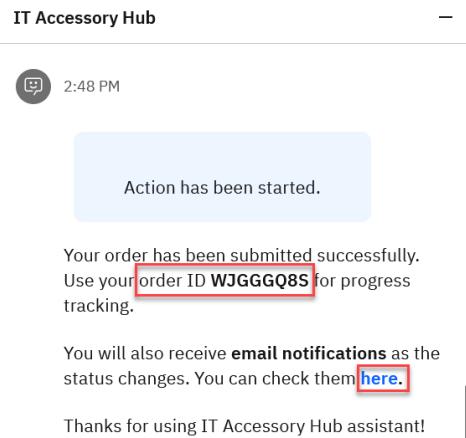


_5. Click on the **Yes** bubble to submit your order.



The Assistant will start the Computer Accessory fulfillment process, which orchestrates all required steps of enforcing company policies, updating yearly spending, potentially involving your manager and/or a procurement specialist, sending notification emails, and eventually placing the order in the back-end procurement application.

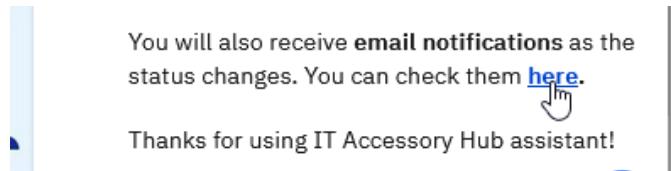
Once the process starts, you should receive an output message stating that the order has been submitted with an order ID for reference. The business process will also send you email notifications about status updates for your order.



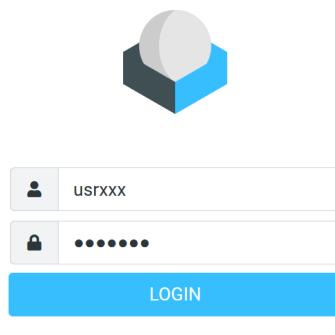
Notes:

- You can use the order ID to query the status of your order. For convenience, the Assistant remembers the last order ID from your conversation, so you will not need to provide it later when you check the status of your last order.
- The Assistant also supports querying all user orders and their status.
- You can use the email link to launch the web-based email client directly.

_6. Click on the **here** link to open a new web browser tab with the *Webmail* client.



_7. For the username, enter usrxxx replacing usrxxx with your username; for the password, enter the password you received. Finally, click **LOGIN**.



_8. Note the auto-approval email containing the order details.

The screenshot shows an email client interface. On the left is a sidebar with icons for Compose, Mail, Contacts, Settings, Dark mode, About, and Logout. The main area shows an email titled "Status Update for Order WJGGGQ8S - Status: Approved". The email is from cpadmin@cp.internal on 2025-03-10 14:49. It contains the following text:

Dear Jane,

We are pleased to inform you that we received your order (order ID 'WJGGGQ8S') of a Logitech G305 LIGHTSPEED Wireless Mouse, with a total cost of \$39.48.

The status of your order is: 'Approved'

The order was auto-approved due to the following reason: - your purchase cost is within the remaining budget and was therefore auto approved

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Best regards,
FocusCorp Purchasing Team

At the bottom, there are navigation buttons: <<, <, >, >>. Below them, it says "Messages 1 to 1 of 1" and has a page number "1".

█ If the email has not yet arrived, please click the Refresh button in the top center until it is shown.

_9. Switch to the IT Accessory Hub tab and type **Check order status** into the assistant window.

The screenshot shows the IT Accessory Hub assistant window. At the top, it says "Thanks for using IT Accessory Hub assistant!". Below that is a blue circular help icon. The main input field is labeled "Get order status" and has a red border. To the right of the input field is a blue arrow icon.

_10. The Assistant will respond with the approval status and the order number.

The Assistant remembered the order ID of your last order, so you did not need to enter it.

The screenshot shows the IT Accessory Hub assistant window again. At the top, it says "IT Accessory Hub". Below that, it shows a message from "You" at 3:10 PM: "Get order status".

Below that, there are two messages from the assistant:

- 3:10 PM: "Querying your order status, please wait ..."
- 3:10 PM: "Your order **WJGGGQ8S** is **Approved**. ?"

4 Exercise: Ordering a second mouse requiring approval

4.1 Introduction

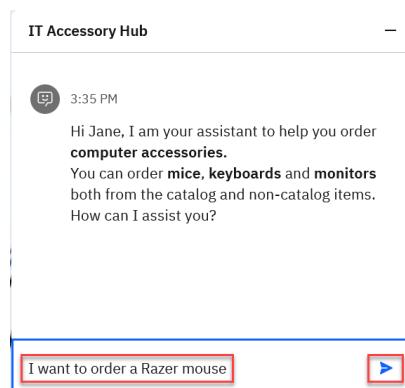
Later in the year, Jane needs to order another mouse for her secondary device. As her secondary device is stationary, the mouse should have different features. Therefore, she prefers a different brand.

4.2 Step-by-step instructions

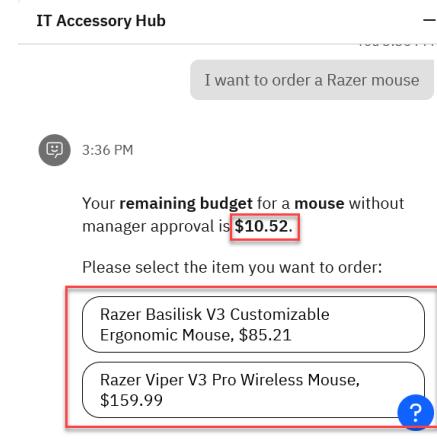
4.2.1 Employee: Request mouse

_1. Type **I want to order a Razer mouse** in the Assistant window. Either **press enter** or click the blue arrow at the right of the Assistant window to submit your message.

If the Assistant informs you that the item was not found, a typo or character added when copy-pasting may be the reason. In this case, select the **Browse catalog for category: mouse** bubble and select the mouse from the list of all available mice.

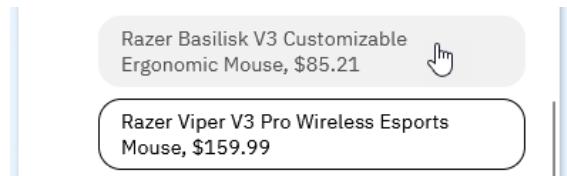


_2. Note the information returned by the Assistant.

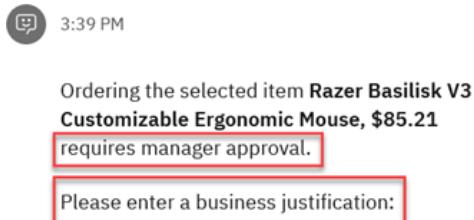


The Assistant finds two Razer mouse models in the catalog. It shows the remaining budget of \$10.52 to spend in the mouse category for the year without requiring manager approval (\$50 minus the \$39.48 you spent on the first mouse earlier in the year).

_3. Click on the first bubble, **Razer Basilisk V3 Customizable Ergonomic Mouse**.

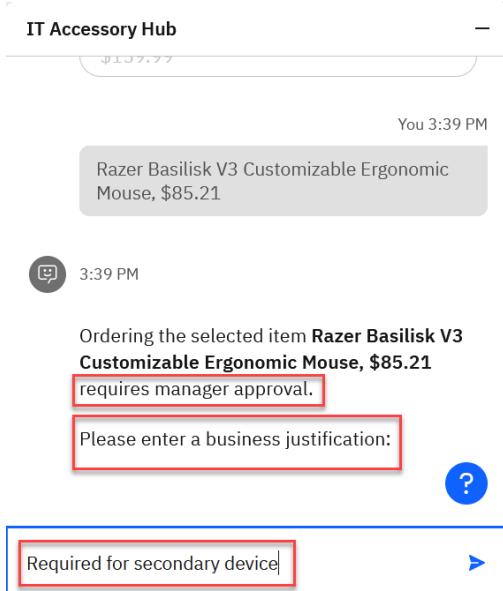


_4. Note the Assistant's response.

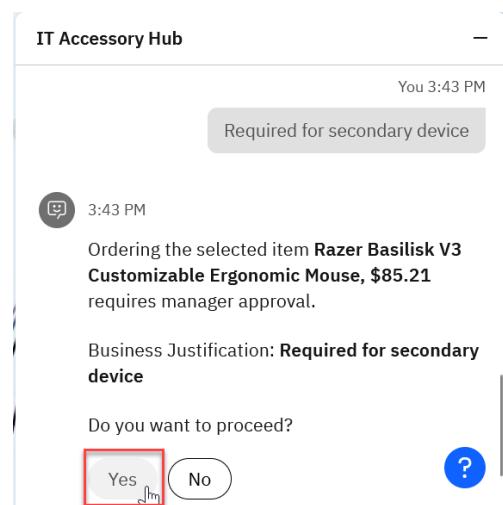


Since the item cost is above the remaining budget for auto-approval, the Assistant informs you that your order will require your manager's approval and asks you for a business justification.

_5. Enter **Required for secondary device** business justification, and either **press enter** or click on the blue arrow.



_6. The Assistant provides the order summary. Click the **Yes** bubble to submit your order.



7. Examine the order summary.

The summary includes the order ID and a link to the email client to access the status emails.

Action has been started.

Your order has been submitted successfully. Use your order ID **28NMSJHU** for progress tracking.

You will also receive **email notifications** as the status changes. You can check them [here](#).

Thanks for using IT Accessory Hub assistant!

8. Click the **Roundcube Webmail** tab to examine the email in the web browser.

IT Accessory Hub Scenario Roundcube Webmail :: Welcome IBM watsonx Orchestrate

jam-wxo-endtoend-lab-ibm-cp4ba...

9. Note the pending manager approval email containing the order details and why this order requires manager approval.

Status Update for Order 28NMSJHU - Status: Pending manager approval

From cpadmin@cp.internal on 2025-03-10 15:47

[Details](#) [Headers](#) [Plain text](#)

Dear Jane,

We are pleased to inform you that we received your order (order ID '28NMSJHU') of a **Razer Basilisk V3 Customizable Ergonomic Mouse**, with a total cost of **\$85.21**.

The status of your order is: '**Pending manager approval**'

The order is pending manager approval due to the following reasons:

- Your item cost of \$85.21 would exceed your category auto-approved budget of \$50.0 by \$35.21
- Your item cost of \$85.21 would require manager approval as it exceeds the auto-approved budget of \$50.0

You will receive another email once your manager has taken a decision for your order.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Thank you for your patience and understanding.

Best regards,
FocusCorp Procurement Team

■ If the email has not yet arrived, please click the Refresh button.

_10. Switch back to the IT Accessory Hub tab and type **Check order status** into the assistant window.



_11. The Assistant will respond with the status *Pending manager approval*. The message contains the order ID, the status, and the same reasons as in the email.

IT Accessory Hub

Check order status

3:50 PM
Querying your order status, please wait ...

3:50 PM
Status of your order **28NMSJHU** is: **'Pending manager approval'**.

Additional information:

- Your item cost of \$85.21 would exceed your category auto-approved budget of \$50.0 by \$74.69
- Your item cost of \$85.21 would require manager approval as it exceeds the auto approved limit of \$60.0 by \$25.21

4.2.2 Manager: Approve/Reject order

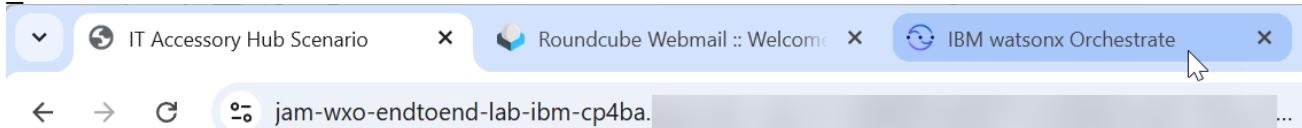
Now, you are assuming the role of Jane's manager, Felix. He has to check Jane's order and either approve or reject it.

Recall that the Assistant launched a Computer Accessory fulfillment process. One step in the process is a Manager approval task, which will be available in the Tasks list.

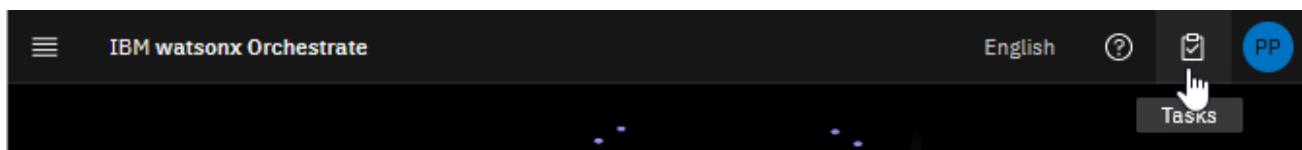
The Manager will open the tasks list, locate the approval task, and complete it.

4.2.2.1 Open the tasks list

_1. Switch to the **IBM watsonx Orchestrate** web browser tab.



_2. Click the **Tasks** icon on the top navigation bar to launch the Tasks list.



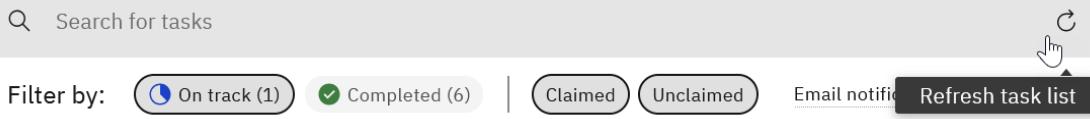
_3. You should now see at least one *Manager Approval* task in the Tasks list.

The screenshot shows the IBM Watsonx Orchestrate interface with the 'Tasks' tab selected. A single task, 'Manager Approval', is listed. The task details are as follows:

Task name	Priority	Status	Due on	Created on	Owner
Manager Approval	Medium	On track		Mar 11, 2025, 1:31 p.m.	

Below the table, there are pagination controls: 'Items per page' set to 5, '1-1 of 1 items', and '1 of 1 page'. On the right side of the table, there is a 'Claim' button with a blue outline.

If your Tasks list does not include the Manager Approval task, click on the refresh icon in the top right corner until it does.



4.2.2.1 Create a tasks list customization

The IBM Watsonx Orchestrate environment is a shared environment. In our lab scenario, the user tasks created are visible to all users of this instance.

We will customize the Tasks list to ensure you can easily find the correct user task for the manager's approval and all other user tasks created in the scenario. The customization will specify a filter and add a column showing the order ID.

_1. Create a customization for the Tasks list by clicking on the **Customize your view** icon at the right.

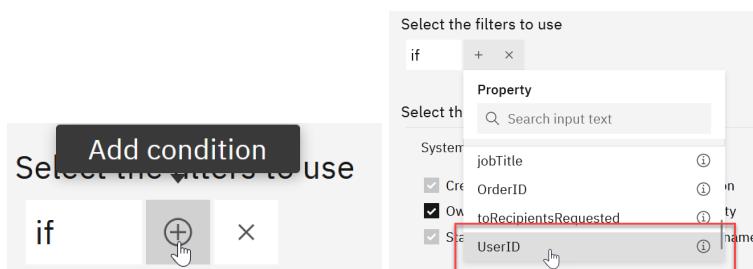
The screenshot shows the Tasks list with a red box highlighting the 'Customize your view' icon in the top right corner of the header area.

_2. Specify **IT Accessory Hub** as the Filter name.

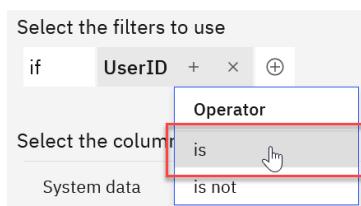
The screenshot shows the 'Customize your view' dialog box. At the top, it says 'Customize your view' and has a close button 'X'. Below that, it says 'Combine filters, sort and select the columns, and save the customized configuration of your view.' A 'Filter name' input field is present, containing 'IT Accessory Hub', which is also highlighted with a red box. At the bottom, a note states: 'The filter name must have a maximum of 20 alphanumeric characters, and cannot be numeric only or blank.'

3. In the **Select the filters to use** section, create a filter for **Custom Data** attribute **UserID** as shown below and specify the username (e.g. usrxxx, replacing xxx with the number of your user) provided to you as filter argument.

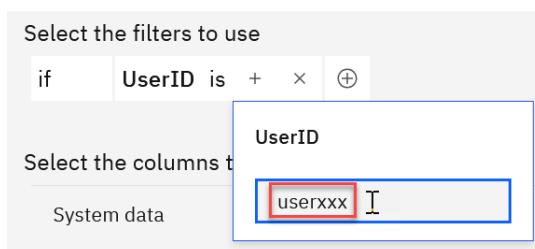
- Click on the **+** sign, scroll to the Custom Data section, select the UserID entry, or type UserID into the "Search input text" field.



- In the window that pops up, select **is**.



- In the window that pops up, enter the user id to the back-end system that you received (e.g. usrxxx, replacing xxx with the number of your user).



Your filter should look like this:

Customize your view

Combine filters, sort and select the columns, and save the customized configuration of your view.

Filter name

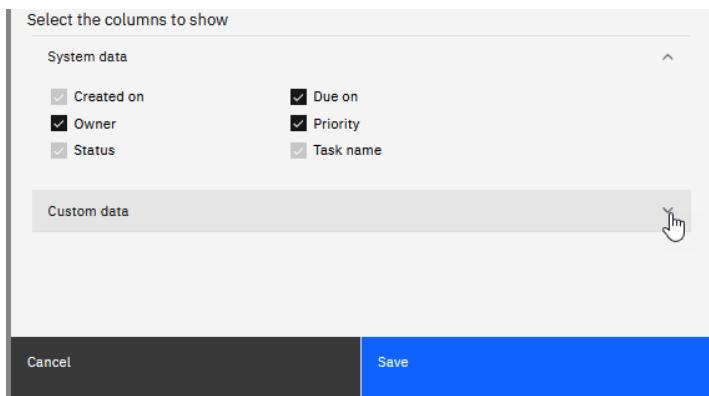
IT Accessory Hub U

The filter name must have a maximum of 20 alphanumeric characters, and cannot be numeric only

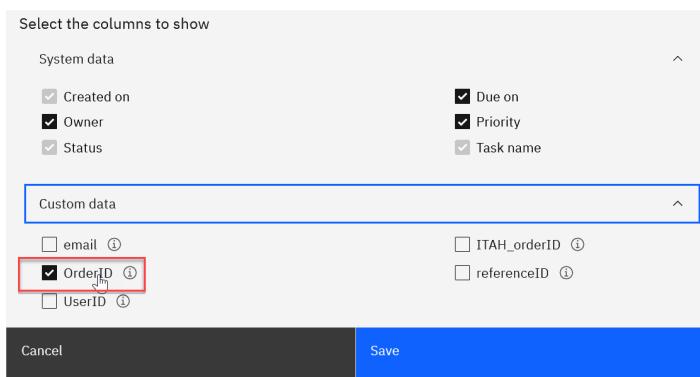
Select the filters to use

if UserID is userxxx +

_4. Scroll to the bottom of the pop-up window and expand the **Custom data** section.



_5. Select the **OrderID** custom data field to add as a column in the output list and click **Save**.



_6. Your Tasks list should look like below:

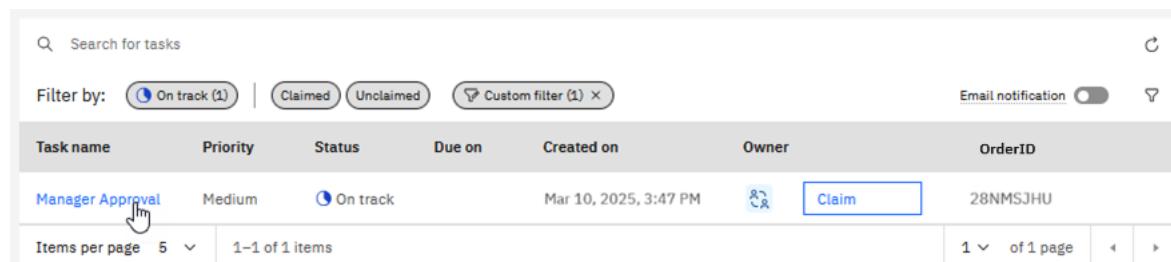
- Uses a Custom Filter (top center)
- Shows your **Manager Approval** task
- Includes the OrderID column

Task name	Priority	Status	Due on	Created on	Owner	OrderID
Manager Approval	Medium	On track		Mar 11, 2025, 1:31 p.m.		28NMSJHU

If your Manager Approval task is not shown, please verify that you have specified the correct username and/or click on the refresh icon in the top right corner until it does.

4.2.2.2 Claim and open the task

_7. Click on the Manager Approval task (link in the first column).



Task name	Priority	Status	Due on	Created on	Owner	OrderID
Manager Approval	Medium	On track		Mar 10, 2025, 3:47 PM		28NMSJHU

Items per page 5 1–1 of 1 items 1 of 1 page

If you get asked, click Claim in the pop-up dialog and check the box to no longer show the dialog.

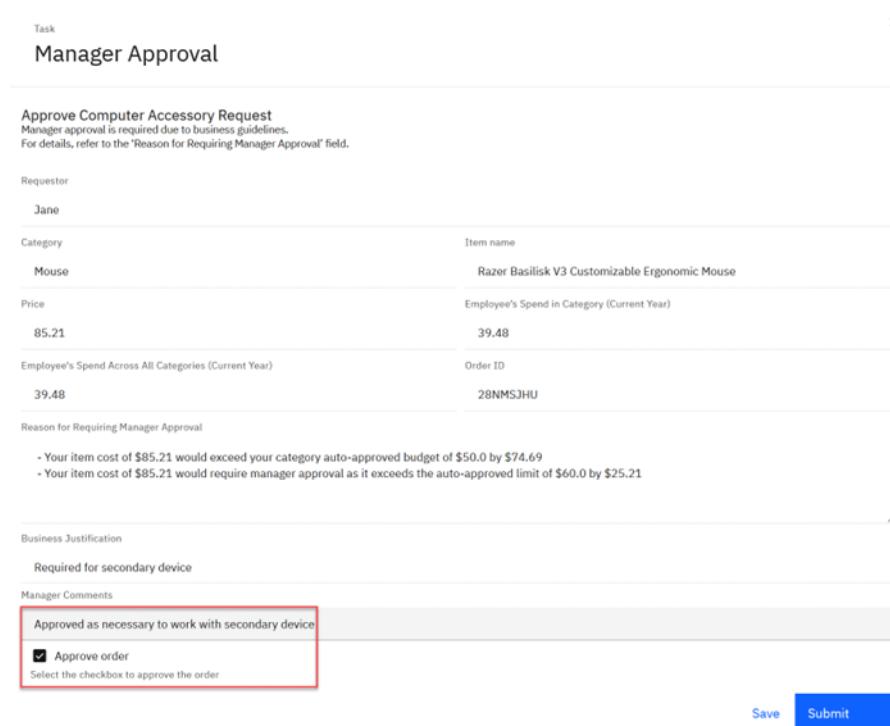
4.2.2.3 Complete task

The user task UI that is shown contains all relevant information about your order, including the requestor, the item, the cost, previous spending in this category, and overall, the order ID, the reasons for requiring manager approval, and the business reason you gave.

As a manager, you must provide comments and either check the *Approve order* checkbox to approve the order or leave it unchecked to reject it before clicking the Submit button. If you want to postpone your decision for later, click the Save button.

_1. For Manager Comments, enter "Approved as necessary to work with secondary device" and check the *Approve order* checkbox.

If you do not want to approve the request, leave the checkbox unchecked.



Task
Manager Approval

Approve Computer Accessory Request
Manager approval is required due to business guidelines.
For details, refer to the 'Reason for Requiring Manager Approval' field.

Requestor	Jane
Category	Item name
Mouse	Razer Basilisk V3 Customizable Ergonomic Mouse
Price	Employee's Spend in Category (Current Year)
85.21	39.48
Employee's Spend Across All Categories (Current Year)	Order ID
39.48	28NMSJHU

Reason for Requiring Manager Approval

- Your item cost of \$85.21 would exceed your category auto-approved budget of \$50.0 by \$74.69
- Your item cost of \$85.21 would require manager approval as it exceeds the auto-approved limit of \$60.0 by \$25.21

Business Justification

Required for secondary device

Manager Comments

Approved as necessary to work with secondary device

Approve order

Select the checkbox to approve the order

Save Submit

_2. Click Submit to complete the task.



Your task will be completed and be removed from the Tasks list.

4.2.3 (Optional) Employee: Check order status

Optionally, you could check the Assistant's order status and email. To do so, follow the steps described previously.

The order status and the email should look similar to the screenshots below:

IT Accessory Hub

3:50 PM

Status of your order **28NMSJHU** is: 'Pending manager approval'.

Additional information:

- Your item cost of \$85.21 would exceed your category auto-approved budget of \$50.0 by \$74.69
- Your item cost of \$85.21 would require manager approval as it exceeds the auto-approved limit of \$60.0 by \$25.21

You 4:24 PM

Get order status

4:24 PM

Querying your order status, please wait ...

4:25 PM

Your order **28NMSJHU** is '**Approved**'

Reply Reply all Forward Delete Mark More

Status Update for Order 28NMSJHU - Status: Approved

From cpadmin@cp.internal on 2025-03-10 16:23

[Details](#) [Headers](#) [Plain text](#)

Dear Jane,

We are pleased to inform you that your order (order ID '28NMSJHU') of a **Razer Basilisk V3 Customizable Ergonomic Mouse**, with a total cost of **\$85.21** has been approved by your manager.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Best regards,
FocusCorp Procurement Team

5 Exercise: Ordering a non-catalog keyboard

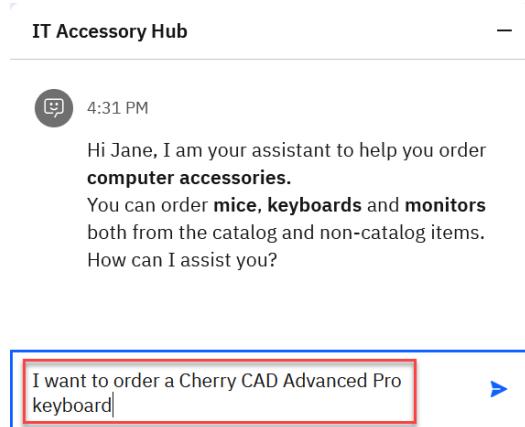
5.1 Introduction

As a CAD designer at Focus Corp, Jane recently received an upgrade for her CAD software. This new version requires a specific keyboard to benefit from new features, so Jane wants to order that keyboard next.

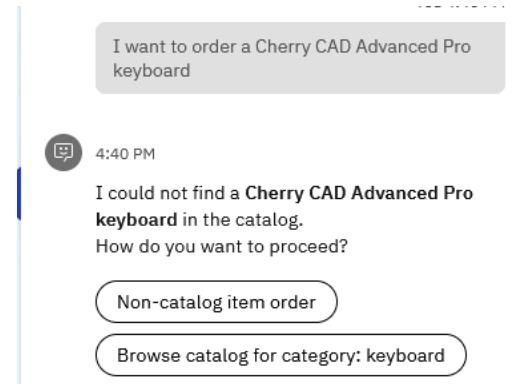
5.2 Step-by-step instructions

5.2.1 Employee: Request keyboard

- _1. Type **I want to order a Cherry CAD Advanced Pro keyboard** into the Assistant window. Either **press enter** or click on the blue arrow to submit your message.

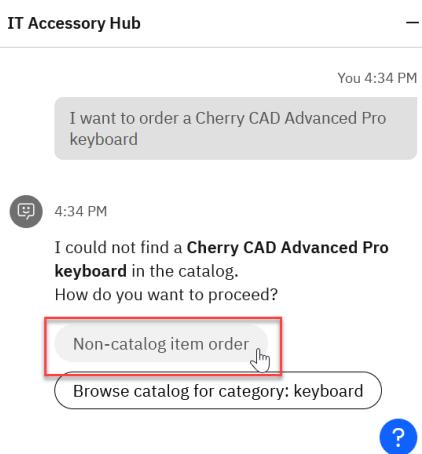


- _2. Note the information returned by the Assistant.



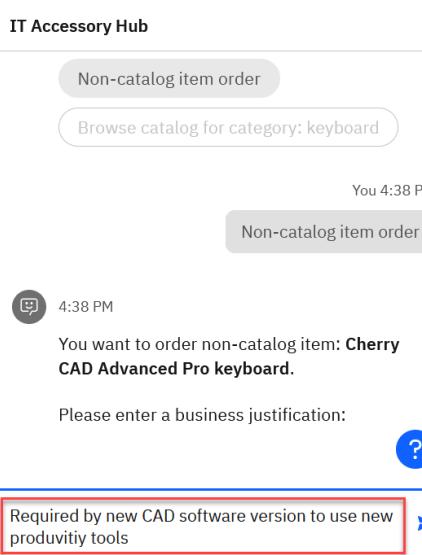
The Assistant understands that the item is from the *Keyboard* category and that the keyboard's name is *Cherry CAD Advanced Pro*. The Assistant consults company policy, which permits non-catalog item orders. Alternatively, it can search Focus Corp's catalog for available keyboards.

_3. Click on the first bubble, **Non-catalog item order**, to order the requested keyboard.

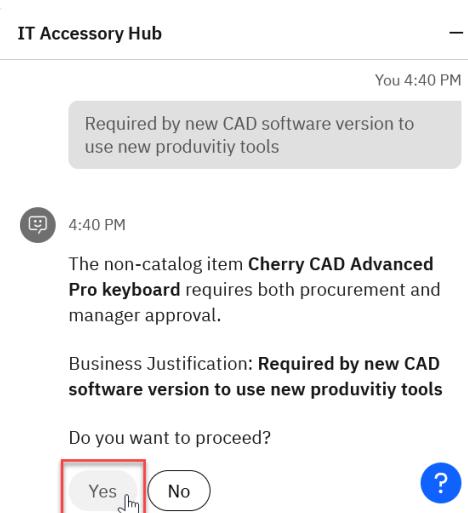


_4. Note that per company business policies, non-catalog item orders require a business justification to be specified, which is what the Assistant is asking you to provide next.

_5. For business justification, enter **Required by new CAD software version to use new productivity tools** and press enter or click on the blue arrow.



_6. The Assistant summarizes your order and asks for a final confirmation before placing the order. Click on the **Yes** bubble to submit your order.



The Assistant will start a Computer Accessory fulfillment process that orchestrates all required steps of checking company policies, updating yearly spending, potentially involving your manager and/or a procurement specialist, sending notification emails, and eventually placing the order in the back-end procurement application.

Once the process starts, you should receive an output message stating that the order has been submitted with an order ID for reference. The business process will also send you email notifications about status updates for your order.

IT Accessory Hub

4:42 PM

Action has been started.

Your order has been submitted successfully.
Use your order ID **UCG5TZSR** for progress tracking.

You will also receive **email notifications** as the status changes. You can check them [here](#).

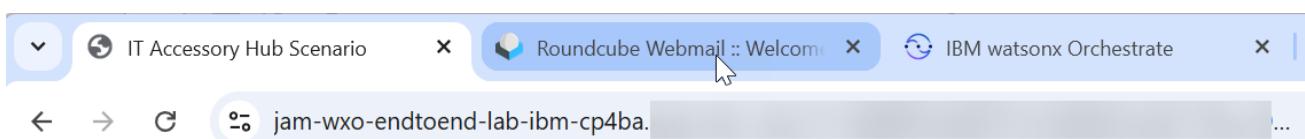
Thanks for using IT Accessory Hub assistant!

Notes:

- You can use the order ID to query the status of your order. The Assistant remembers the order ID from your conversation, so you will not need to provide it later when you check the status of your last order.
- You can use the email link to launch the web-based email client directly.

5.2.2 Employee: Check email

- _1. Click the **Roundcube Webmail** tab to examine the email in the Web browser.



- _2. You will see an email with the order ID as part of the subject that informs you that your order is pending the procurement department's request for quotes from Focus Corp's suppliers.

Compose

Mail

Contacts

Settings

Dark mode

About

Logout

Search... cpadmin@cp.internal Today 16:42

Status Update for Order UCG5TZSR - Status: Pending supplier quotes

From cpadmin@cp.internal on 2025-03-10 16:42

Details Headers Plain text

Dear Jane,

We are pleased to inform you that we received your order (order ID 'UCG5TZSR') of non-catalog item **Cherry CAD Advanced Pro keyboard**.

The item is not in our catalog. We have engaged the procurement department.

The status of your order is: **'Pending supplier quotes'**

You will receive another email once quotes have been received.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

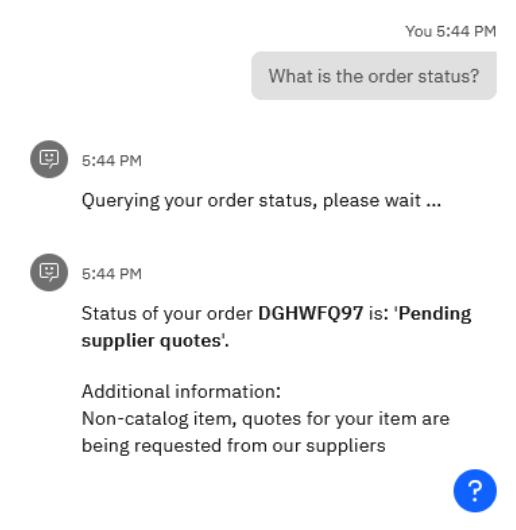
Thank you for your patience and understanding.

Best regards,
FocusCorp Procurement Team

■ If the email has not yet arrived, please click the Refresh button in the top center until it is shown.

5.2.3 (Optional) Employee: Check order status in Assistant

Optionally, you can check the order status in the Assistant window as done previously.



Non-catalog item ordering process: The Computer Accessory fulfillment process requires the involvement of a procurement specialist to request and select an appropriate supplier for ordering a non-catalog item and the requestor's manager to approve the order. Note that you can check the order status to see the progress of your order by typing "What is the order status?" in the Assistant.

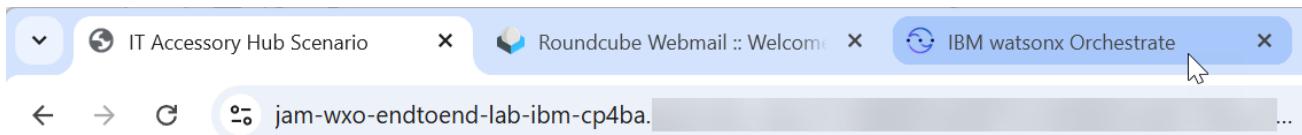
These are the process steps:

- As part of a user task, a procurement specialist must send an email request to all potential suppliers for the item.
- Once the procurement specialist receives the quotes, the process extracts the respective data from the quotes and asks the procurement specialist to select one of the suppliers or to reject the order.
- If a procurement specialist selects a supplier, the requestor's manager gets a user task to approve or reject the order.

5.2.4 Procurement Specialist: Request quotes from suppliers

Now, we are assuming the role of Maria, one of Focus Corp's procurement specialists. She must first request quotes for the items Jane wants to order from Focus Corp's suppliers.

_1. Switch to the **IBM watsonx Orchestrate** web browser tab.



_2. Your Tasks list should contain a **Prepare Quote Generation Request Email** task for you.

The screenshot shows the "Tasks" list in the IBM Watson Orchestrate interface. At the top, there is a search bar and filter options for "On track (1)", "Completed (1)", "Claimed", "Unclaimed", and "IT Accessory Hub (2)". There is also a toggle for "Email notification". The main table lists tasks with columns: Task name, Priority, Status, Due on, Created on, Owner, and OrderID. One task, "Prepare Quote Generation Request Email", is highlighted with a red border. The table footer includes "Items per page" set to 5, "1–1 of 1 items", and navigation buttons for the first page.

Task name	Priority	Status	Due on	Created on	Owner	OrderID
Prepare Quote Generation Request Email	Medium	On track		Mar 10, 2025, 4:43 PM		Claim
						UCG5TCSR

If your task list does not include the Prepare Quote Generation Request Email task, click on the refresh icon in the top right corner until it does.

Search for tasks

Filter by: Completed (1) | Claimed | Unclaimed

IT Accessory Hub (1) X

Email notifications Refresh task list



_3. Click on the **Prepare Quote Generation Request Email** task (link in the first column).

_4. The *Prepare Quote Generation Request Email* task UI opens.

The screenshot shows the 'Tasks' tab selected in the IBM Watsonx Orchestrate interface. A specific task titled 'Prepare Quote Generation Request Email' is displayed. The task details include:

- Request for quotation email template
- Subject: Request for Quotation - Cherry CAD Advanced Pro Keyboard for Focus Corp
- Dear [Vendor's Name],
- I hope this email finds you well. I am writing to request a quotation for the **Cherry CAD Advanced Pro keyboard**, which is required by employees of Focus Corp.
- We are interested in receiving a detailed quote that includes the following information:
 - * Price per unit
 - * Delivery terms (e.g. estimated delivery date)
 - * Shipping terms (e.g. shipping cost, shipping method, estimated delivery time)
- Please provide the quote in a PDF format, and kindly send it back to us within one week from the date of this email. If you have any questions or require additional information, please do not hesitate to contact us via email or phone.
- We appreciate your time and look forward to receiving your quotation.
- Best regards,
- [Your Name]
[Your Position]
[Your Contact Information]

At the bottom of the task view are 'Save' and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

The content of the Request for Quotation email template was generated using Generative AI capabilities in wxO. Therefore, the content may be somewhat different for you. As the field is editable, the draft can be modified before sending.

The email template includes the name and model of the item requested. The procurement specialist should review and customize the email before completing the task. Upon task completion, the process will send the email to the suppliers.

_5. Click the **Submit** button.

Save **Submit**

5.2.5 Employee: Check order status

The employee can check the order status by examining the latest email or typing "Get order status" into the Assistant chat.

_1. Switch to your web browser's IT Accessory Hub tab and type: [Get order status](#).

The screenshot shows a web browser window titled 'IT Accessory Hub'. At the top right is a button labeled 'Get order status'. Below it, a message says 'Querying your order status, please wait ...'. A red box highlights a message: 'Status of your order UCG5TCSR is: 'Waiting for procurement department to select quote''. Below this, additional information states: 'Additional information: Non-catalog item, waiting for procurement department to select quote'.

_2. Switch to the Roundcube Webmail tab in your web browser and check the latest status update email.

Status Update for Order UCG5TCSR - Status: Waiting for procurement department to select quote

From cpadmin@cp.internal on 2025-03-10 17:03
 Details Headers Plain text

Dear Jane,

We are pleased to inform you that the status of your order (order ID 'UCG5TCSR') of non-catalog item **Cherry CAD Advanced Pro keyboard** has changed.

The status of your order is: '**Waiting for procurement department to select quote**'

You will receive another email once the procurement department has taken a decision for your order.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Thank you for your patience and understanding.

Best regards,
FocusCorp Procurement Team

5.2.6 Procurement specialist: Select supplier for item procurement

We are again assuming the role of Maria, the procurement specialist. She received quotes from several suppliers and needs to make a supplier selection.

_1. Switch back to the wxO Tasks list window and click on the refresh icon in the top right corner until you see a new **Procurement Approval Task** user task.

The screenshot shows a 'Tasks' list window. At the top, there are tabs for 'Tasks' and 'Workflows', with 'Tasks' selected. Below is a search bar and a filter section with buttons for 'On track (1)', 'Completed (8)', 'Claimed', 'Unclaimed', and 'IT Accessory Hub (2)'. An 'Email notification' toggle switch is off. The main table has columns: Task name, Priority, Status, Due on, Created on, Owner, and OrderID. A new task, 'Procurement Approval Task', is listed with 'Medium' priority, 'On track' status, 'Mar 10, 2025, 5:03 PM' due date, and 'Owner' 'UCG5TCSR'. The 'OrderID' column shows 'UCG5TCSR'. A red box highlights the 'Procurement Approval Task' in the 'Task name' column. At the bottom, there are pagination controls: 'Items per page' set to 5, '1–1 of 1 items', '1 of 1 page', and navigation arrows.

2. Click on the Procurement Approval Task task (link in the first column)

A screenshot of a task list interface. At the top, there is a search bar labeled "Search for tasks" and a filter section with buttons for "On track (1)", "Completed (8)", "Claimed", and "Unclaimed". Below this is a table with columns: "Task name", "Priority", "Status", and "Due on". A single row is visible, containing the link "Procurement Approval Task" (which is highlighted with a red box and has a cursor icon over it), "Medium", "On track", and a due date of "08/15/24". At the bottom left is a dropdown for "Items per page" set to "5", and at the bottom right is the text "1-1 of 1 items".

Let's examine the UI presented to the procurement specialist.

The user task UI contains supplier quotes from three suppliers that responded to the request for quotations we generated in the previous task. The PDF response documents come in various formats. The procurement process uses Intelligent Document Processing and Generative AI to extract the quote details (supplier name and price). The procurement specialist needs to select the best quote.

The image shows two side-by-side views. On the left is a PDF document from "IT Supplies Corp." for a "Cherry CAD Advanced Pro keyboard". It includes a header with address information, a table of line items with columns for Description, Qty, Unit Price, and Total, and a summary table at the bottom with fields like Subtotal, Discount, Subtotal Less Discount, Tax Rate, Total Tax, and Shipping/Handling. The total quote amount is listed as \$280.00. On the right is a digital "Procurement Approval Task" interface. It shows the same quote details and a "Quotes" section with a table comparing three suppliers: IT Supplies Corp. (\$280.00), Business Supplies International (\$281.56), and X Computer Equipment Ltd. (\$234.00). The supplier name and price are highlighted with red boxes, and arrows point from the PDF to the digital interface. The digital interface also includes fields for Requestor (Jane) and Order ID (UCG5TZSR), and a checkbox for "I approve the selected quote" with "Save" and "Submit" buttons at the bottom.

At this point, wxO does not provide a way to show the source documents.

_3. Select the radio button in the last row for supplier **X Computer Equipment Ltd.**, check the **I approve the selected quote** checkbox, and click **Submit**.

Make sure to check I approve the selected quote before clicking on Submit. Otherwise, the remaining step will not be available, as the order will be rejected.

Task

X

Procurement Approval Task

The following quotes have been received for the non-catalog item.
Please select the quote based on supplier and price following the business guidelines.

Requestor

Jane

Order ID

UCG5TZSR

Item Name

Cherry CAD Advanced Pro keyboard

Quotes

Supplier	Price
<input type="radio"/> IT Supplies Corp.	\$280.00
<input type="radio"/> Business Supplies International	\$281.56
<input checked="" type="radio"/> X Computer Equipment Ltd.	\$234.00

I approve the selected quote

Save Submit

5.2.7 (Optional) Employee: Check order status

The employee can check the order status by examining the latest email or by typing "Get order status" into the Assistant chat.

_1. Switch to your web browser's IT Accessory Hub tab and type: [Get order status](#).

IT Accessory Hub

You 5:21 PM

Get order status

5:21 PM Querying your order status, please wait ...

5:21 PM Status of your order UCG5TZSR is: 'Waiting for manager approval'.

Additional information:
Procurement department has selected a supplier. Your manager has to finally approve the order.

_2. Switch to the Roundcube Webmail tab in your web browser and check the latest status update email.

Status Update for Order UCG5TZSR - Status: Waiting for manager approval

 From cpadmin@cp.internal on 2025-03-10 17:20
[Details](#) [Headers](#) [Plain text](#)

Dear Jane,

We are pleased to inform you that the status of your order (order ID 'UCG5TZSR') of non-catalog item **Cherry CAD Advanced Pro keyboard**, with a total cost of **\$234.00** has changed.

The status of your order is: **'Waiting for manager approval'**

You will receive another email once your manager has taken a decision for your order.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Thank you for your patience and understanding.

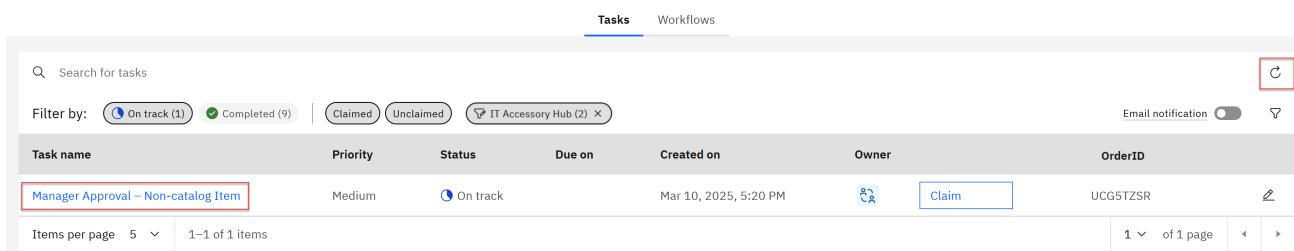
Best regards,
FocusCorp Procurement Team

5.2.8 Manager: Approve/Reject order

When you check the status of your order in the Assistant window and/or the email client, you should see that it has changed to **Waiting for manager approval**. All non-catalog item orders require the requestor's manager to review and approve/reject the order.

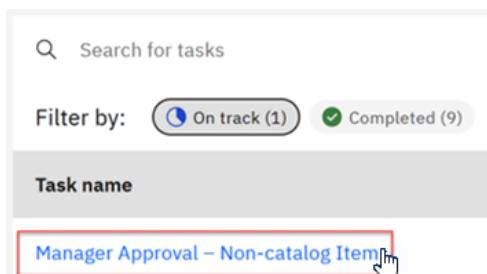
Let's now again assume the role of Jane's Manager, Felix.

_1. Switch back to the wxO Tasks list tab and click on the refresh icon in the top right corner until you see a new **Manager Approval – Non-catalog Item** user task.



Task name	Priority	Status	Due on	Created on	Owner	OrderID
Manager Approval – Non-catalog Item	Medium	On track		Mar 10, 2025, 5:20 PM	 Claim	UCG5TZSR

_2. Click on the **Manager Approval – Non-catalog Item** task (link in the first column).



3. Enter "**Approved as huge productivity gains expected**" or any other text as **Manager Comments**, check the **Approve order** checkbox, and click **Submit**.

The approval user task UI contains all the information required to decide: the requestor, the item, the supplier, the cost, and the business justification.

The manager must comment and either approve or reject the request.

Task

Manager Approval – Non-catalog Item

The purchasing department has selected the supplier below, with the displayed cost, as a source of the requested non-catalog item.
Please approve or reject the non-catalog item.

Requestor	Item Name
Jane	Cherry CAD Advanced Pro keyboard
Selected Quote	
Supplier	Price
X Computer Equipment Ltd.	\$234.00
Business Justification	
Required by new CAD software version to use new productivity tools	
Manager Comments	
Approved as huge productivity gains expected	
<input checked="" type="checkbox"/> Approve order	
Select the checkbox to approve the order	

Save Submit

5.2.9 (Optional) Employee: Check order status

The employee can check the order status by examining the latest email or by typing "Get order status" into the Assistant chat.

1. Switch to your web browser's IT Accessory Hub tab and type: [Get order status](#).

IT Accessory Hub

Check order status

6:43 PM
Querying your order status, please wait ...

6:43 PM
Your order **UCG5TZSR** is 'Approved'.

_2. Switch to the Roundcube Webmail tab in your web browser and check the latest status update email.

Status Update for Order UCG5TZSR - Status: Approved ✅



From cpadmin@cp.internal on 2025-03-10 18:42

[Details](#) [Headers](#) [Plain text](#)

Dear Jane,

We are pleased to inform you that your order (order ID 'UCG5TZSR') of non-catalog item **Cherry CAD Advanced Pro keyboard**, with a total cost of **\$234.00** has been approved by your manager.

If you have any further queries, please do not hesitate to contact us at focuscorp@example.com.

Best regards,
FocusCorp Procurement Team

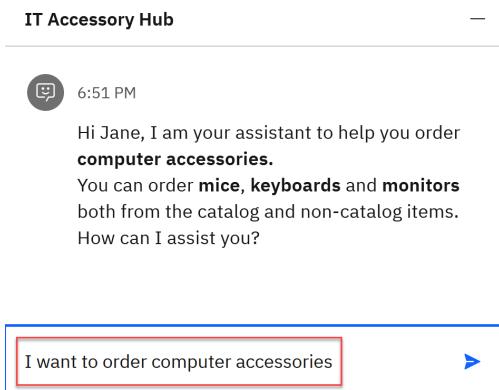
6 Exercise: Browsing the catalog to order a monitor

6.1 Introduction

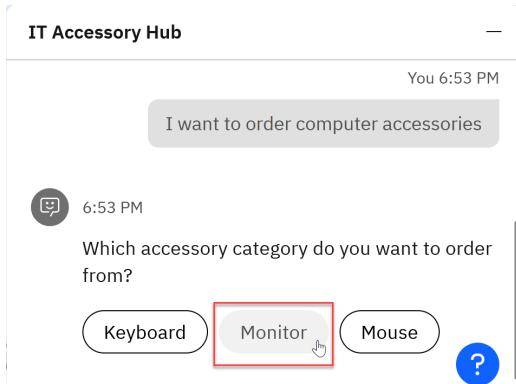
When Jane needs a new monitor but is unsure what model she wants to order, she can browse the catalog for available models to see what is available.

6.2 Step-by-step instructions

- _1. Type **I want to order computer accessories** into the Assistant window and either **press enter** or click the blue arrow at the right to submit your message.

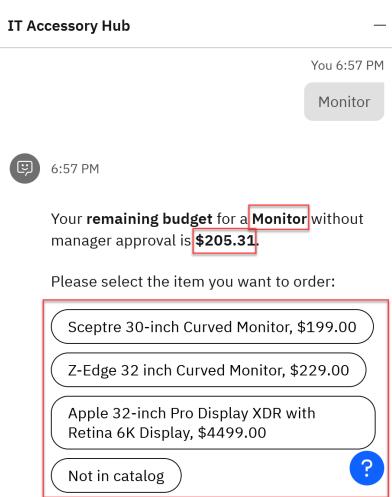


- _2. Click on the **Monitor** bubble to see a list of monitors in the catalog.



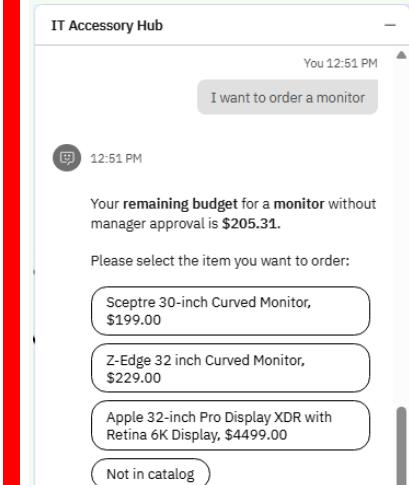
_3. Let's examine the Assistant's response.

The Assistant retrieved the available Monitor choices. In addition, it checked the company computer part procurement policies to calculate and display the remaining budget of \$205.31 for ordering a monitor without requiring manager approval.



Jane can proceed as previously shown, depending on her selection, going through the auto-approval, manager approval, or non-catalog path.

Note: To see the list of monitors directly, as shown above, Jane could have also asked, "I want to order a monitor."



7 Summary

The IT Accessory Hub solution showcases all key parts of IBM watson^X Orchestrate in a simplified but realistic business use case. The featured capabilities include:

- AI Assistant chat,
- Decision, Generative AI, and Workflow, including User Tasks and Intelligent Document Processing,
- Skills that allow access to Focus Corp's computer accessory procurement system of records via its REST API.

The comprehensive industry-agnostic scenario provides an excellent overview of how IBM watson^X Orchestrate, with its AI-powered assistants and orchestration capabilities, includes everything needed to automate, simplify, and accelerate your work.

Congratulations, you have completed this lab!

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P\$+&%&/& @2175! \$7: ,7+ F?J z

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