IBM Business Automation and Digital Labor Hands-on Labs

IBM watsonx Orchestrate Workflow & Generative AI Skills

For IBM watsonx Orchestrate Tech Jam EMEA

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1 Introduction

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 <u>here</u>. To see the technical documentation, click <u>here</u>.

1.2 Lab Scenario

1.2.1 Computer Accessories Ordering Use Case

Focus Corp allows employees to order computer accessories (e.g., mouse, keyboard, headsets, etc.). The ordering system implemented using wxO's advanced Al-enhanced features provides a superior user experience and operational cost reductions.

- *Employees* use wxO Al Assistant. The Al Assistant guides users through the ordering steps, advises on company policies, and helps them make the best 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.
- The purchasing department uses an Al-assisted process to automate the purchase of noncatalog accessories, including the Al-assisted processing of quote documents.

1.2.2 Solution Architecture

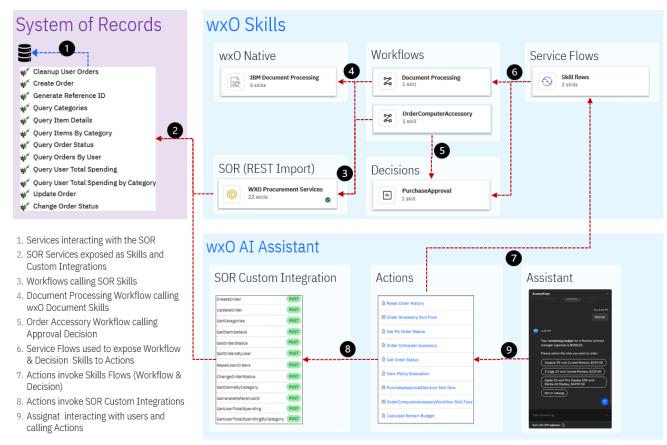
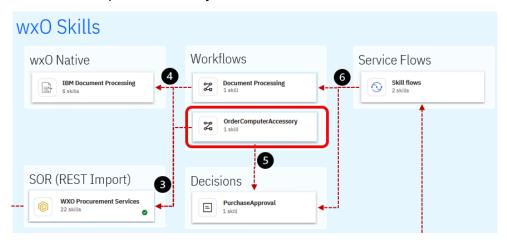


Figure 1. Procurement of Computer Accessories Solution Architecture

1.3 Lab Overview

In this lab, you will implement a subset of the Order Computer Accessory Workflow Skill part of the Solution architecture introduced in the figure above. Specifically, you will author the happy path of the Order Computer Accessory Workflow.



The happy path is part of the complete Workflow and does not include not-in-catalog order processing. The ordered part is available in the catalog and only requires manager approval.



2 Lab Setup Instructions

2.1 Login to IBM watsonx Orchestrate

- _1. In your web browser open 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



3 Preparation

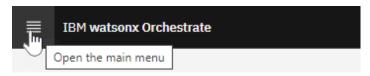
3.1 Add Skills to Personal Skills

In the Workflow Skill (short Workflow) you will create as part of this lab, you will invoke pre-existing Skills that provide access to the ordering system of record of Focus Corp. Since only Skills in your Personal Skills can be invoked from a Workflow, in this step, you will be adding Skills you will need in the Workflow from the system-wide Skill Catalog to your Personal Skills.

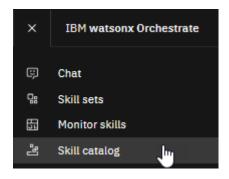
3.1.1 Connect to the ITAH Backend Services App

The ITAH_Backend_Services *App* contains the skills you need to import into your Personal Skill Catalog to use later in the Order Computer Accessories Workflow.

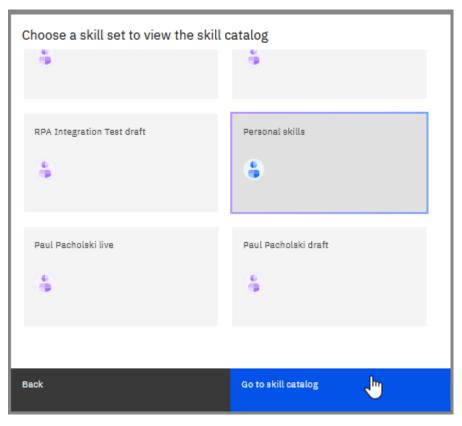
_1. Click the **Hamburger** menu.



2. Click on Skill catalog.



_3. If you see the *Choose a skill set to view the skill catalog* panel, select **Personal skills,** and click **Go to skill catalog**.



_4. Type ITAH_Backend_Services in the Skill catalog search bar and press the enter key.

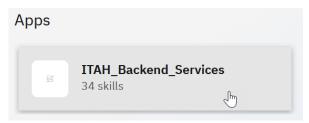
Skill catalog

Skills are grouped by app. Select an app to see all the skills that use that app.



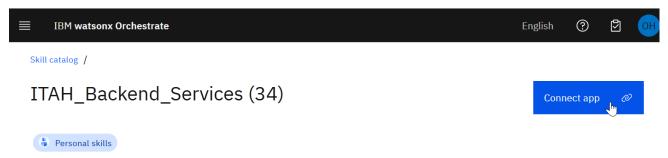
This action will locate the ITAH_Backend_Services App.

_5. Click on the ITAH_Backend_Services tile.

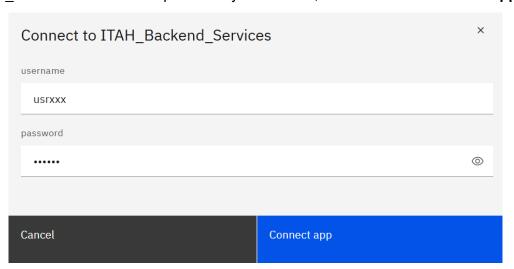


Note: If you have already completed one of the other labs, your ITAH_Backend_Services App may be connected (○ Connected :). In that case, you can skip the following three steps.

6. Click the Connect app button.



_7. Add the user ID and password you received, and click on the Connect app.



8. Verify that the status is **Connected**.

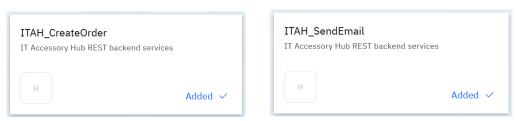


3.1.2 Add "ITAH_Backend_Services" Skills

_1. Locate the ITAH_ChangeOrderStatus Skill and click on Add Skill +. You should see the status set to Added.



2. Similarly, add the following two Skills: ITAH_CreateOrder and ITAH_SendEmail.



3.2 Create wxO Project

A project is a collection of skills that fulfill a business purpose. You create projects in Skill Studio and publish them to the Skills and Apps page, where you train the skills and make them available in the Skill catalog. Users can then use the skill by entering a phrase in the watsonx Orchestrate chat window.

A project can contain one or more skills. A skill fulfills a business purpose and contains business logic. The following are the types of skills available:

Decision

A skill type that captures and automates repeatable intelligent business decisions. For example, a business decision to authorize a loan based on established rules and policies. A decision can be implemented with decision models, ruleflow models, and prediction models.

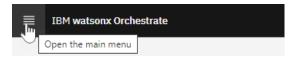
Workflow

This skill type models a business process—for example, a process to find and hire candidates for a job. A workflow is composed of a sequence of activities and tasks. These activities can be other workflows, decisions, or skills you can combine to create powerful solutions.

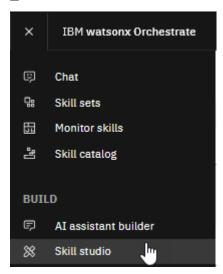
Generative Al

This skill type can be used to analyze or generate contextual information. You can use the prompt editor in the component to specify what needs to be analyzed or produced. You can then use the content within a skill or a broader project.

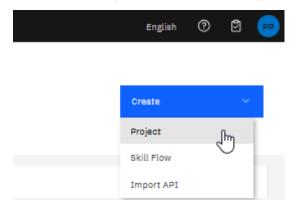
1. Click the **Hamburger** menu in the top-left corner.



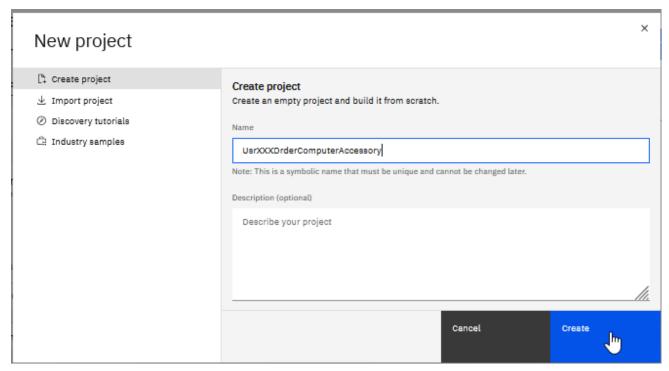
2. Click Skill studio.



_3. In the top-right, click Create > Project.



_4. For *Name*, enter **UsrXXXOrderComputerAccessory** (remember to replace XXX with the three-digit number in the user id you have received), provide an optional description, and click **Create**.



4 Exercise: Create a Generative Al Skill

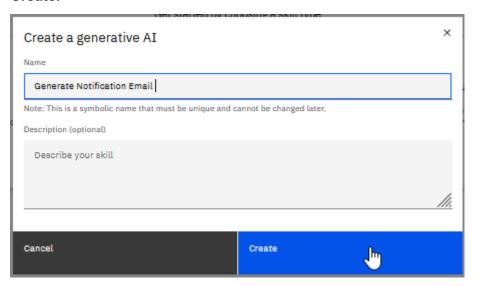
4.1 Create a Generative AI Skill to Generate Email Text

In this section, you will use Generative AI skills to create emails that provide status updates to employees based on their orders at multiple stages of order processing.

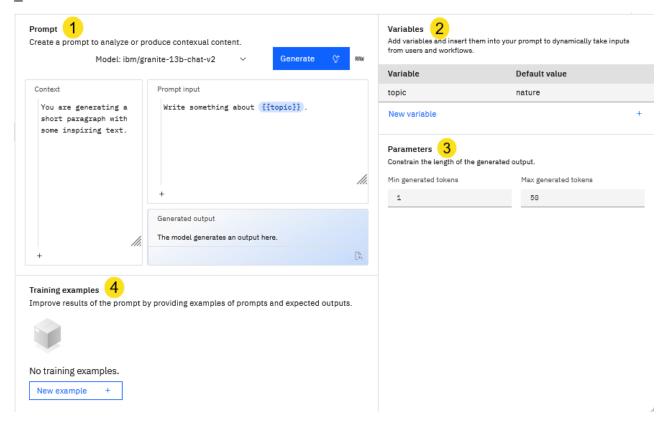
_1. Click the Generative AI tile.



_2. For *Name*, enter **Generate Notification Email**, provide an optional description, and click **Create**.



3. Examine the Generative Al Editor.



1) Prompt:

Model selection. You can select a model from the list of supported models and their capabilities. Click here for a list of supported models and their capabilities.

Context. It provides the background or contextual information in your prompt. You can use it to nudge the model output in the right direction. Specifically, words that appear in your prompt text are more likely to be included in the generated output. Enter the text (including Get Al Skill input variables) you want the model to answer in the Prompt input pane.

Click the Generate button. The model generates output in the Generated output pane, allowing you to preview and further refine your prompt.

- 2) **Variables**: This section defines variables and default values that can be used within the prompt input. When invoking the Generative AI skill, you can pass values for these variables, which will be included in the generated output.
- 3) Parameters: Parameters to control the length of the generated output.
- 4) **Training examples:** Optionally add examples to the prompt to improve the precision, quality, and stability of the output generated with your prompt.

4.2 Author the Generative Al Skill

4.2.1 Create Input Variables

_1. Click the *topic* variable, rename it to **referenceID**, and change the default value to **123**.



_2. Click New variable.

Variable	Default value	
referenceID	123	
New variable	√µµ)	+

_3. For Variable, enter **status** and for *Default value* **approved.**

Variables Add variables and insert the	em into your prompt to dynamically ta	ke inputs
from users and workflows.		
Variable	Default value	
referenceID	123	Ū
status	approved	Ü

_4. Repeat steps 2-3 to create three more variables.

Variable	Default value
reason	The old mouse was broken.
receiver	receiver
item	Supermouse P240

The variables should look exactly like this:

Variable	Default value	
referenceID	123	Ü
status	approved	Ü
reason	The old mouse was broken.	Ü
receiver	receiver	Ü
item	Supermouse P240	Ü

4.2.2 Define Generative Al Model Prompt

1. **Select** and **delete** the contents of the *Prompt input*.



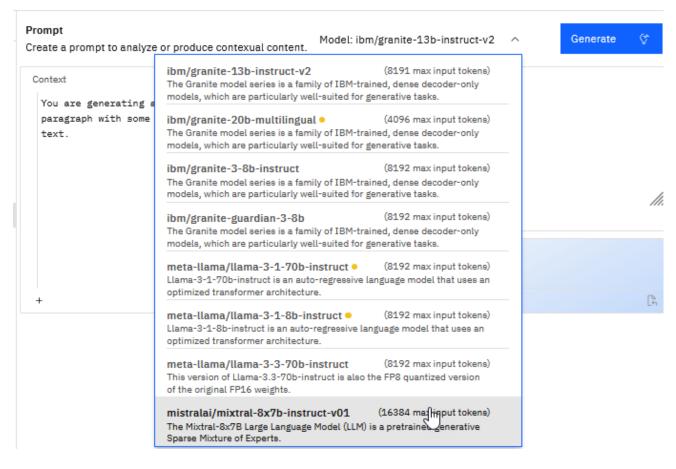
2. In the *Prompt input*, enter the following prompt:

please write a status update email about the order request in simple html document, order item is {{item}} and referenceID is {{referenceID}}, its status is {{status}} due to the reason of {{reason}}. the receiver is {{receiver}}. We could be reached via email (focuscorp@example.com) for any other queries. please include the contents in <html></html> only. If reason contains auto-approved, please include "Reason for the approval: cost is within the budget and was therefore auto approved" in the email text.

```
please write a status update email about the order request in simple html document, order item is {{item}} and referenceID is {{referenceID}}, its status is {{status}} due to the reason of {{reason}}. the receiver is {{receiver}}. We could be reached via email (focuscorp@example.com) for any other queries. please include the contents in <html></html> only. If reason contains auto-approved, please include "Reason for the approval: cost is within the budget and was therefore auto approved" in the email text.
```

Note: The double curly braces, {{}}, represent the variables you added earlier in the variables pane. They will be used in the email to customize the generated message.

_3. Click on the *Model* dropdown and select the mistralai/mixtral-8x7b-instruct-v01 model.



4. Replace the *Context* with **Generate business-friendly, upbeat emails.**



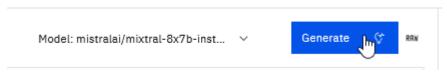
_5. In the Parameters section, set the Max generated tokens to 1000.



Note: You need to set the Max generated tokens with values based on the length of your generated text. If you keep a lower value, your generated text will appear partially.

4.3 Test the Generative AI Skill

1. Click on the **Generate** button.



2. Verify that your email generated by the Generative AI Skill looks similar to the screenshot below.

```
chtml>
chtml
chtml>
chtml
chtml>
chtml
chtm
```

5 Exercise: Create Workflow

5.1 Create the Workflow

In this lab part, you will create one of the sub-flows of the Workflow Skill used in the complete Order Computer Accessories scenario.

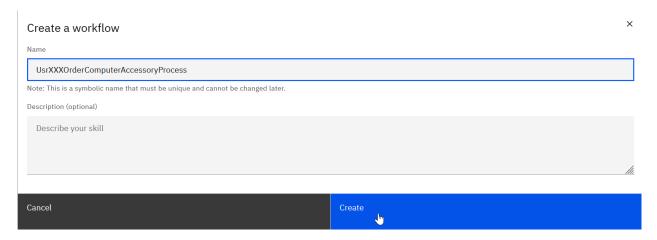
_1. Click **Create skill +** in the bottom left corner.



2. Click the Workflow tile.



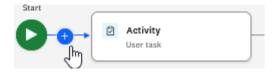
_3. For *Name*, enter **UsrXXXOrderComputerAccessoryProcess** (remember to replace XXX with the three-digit number in the user id you have received), provide an optional description, and click **Create.**



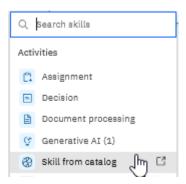
5.2 Author the Workflow

5.2.1 Add "ITAH_CreateOrder" Skill

1. Click the **+ icon** after the process Start activity.



_2. Select Skill from catalog.



_3. In the search bar, type ITAH_Backend_Services, and press enter.

Choose a skill from the list to invoke

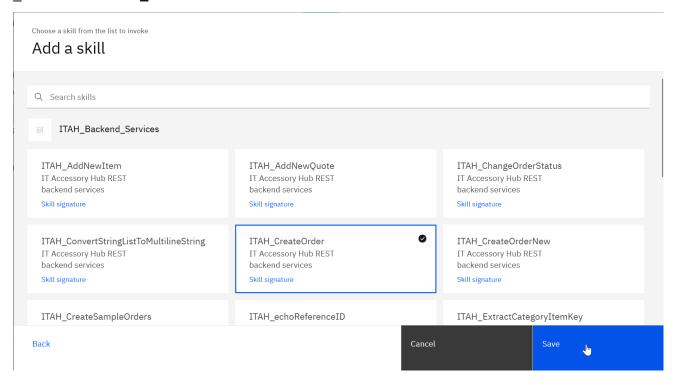
Add a skill



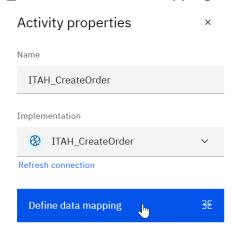
_4. Click the ITAH_Backend_Services tile.



_5. Select the ITAH_CreateOrder skill and click Save.



_6. Click **Define data mapping.**



_7. For userID, click the **Select a variable icon.**



_8. Click Create variable + icon.



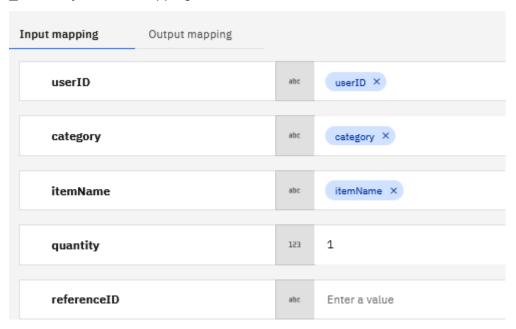
_9. Click the **Create** button.



- _10. Repeat steps 7-9 to create the following new variables and map them:
 - category
 - itemName
- _11. For quantity, enter 1.



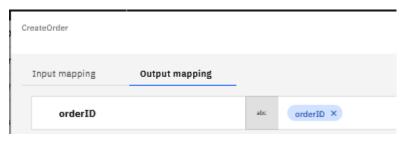
_12. Verify that the mapping looks as shown below



_13. Click the **Output mapping** tab.



14. Repeat steps 7-9 to create a new orderID variable and map it.



_15. Click **OK** to save and close the mapping editor.

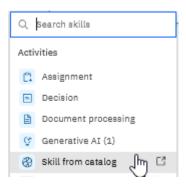


5.2.2 Add "PurchaseApprovalDecision" Skill

_1. Click the **+ icon** on the line leading to the Activity activity.



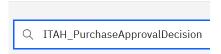
_2. Select Skill from catalog.



_3. In the search bar, type ITAH_PurchaseApprovalDecision, and press enter.

Choose a skill from the list to invoke

Add a skill



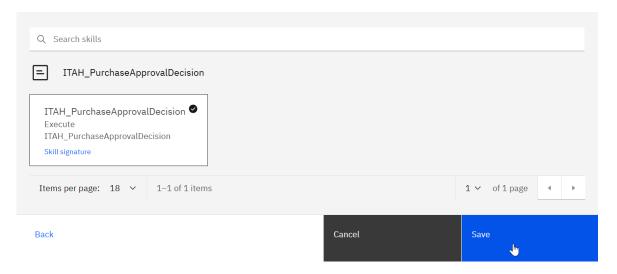
_4. Select ITAH_PurchaseApprovalDecision tile.



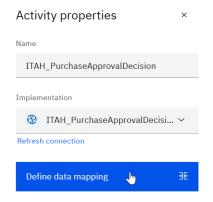
_5. Select the PurchaseApprovalDecision skill and click Save.

Choose a skill from the list to invoke

Add a skill



_6. Click Define data mapping.



_7. For cost, click Select a variable icon.



_8. Click Create variable + icon



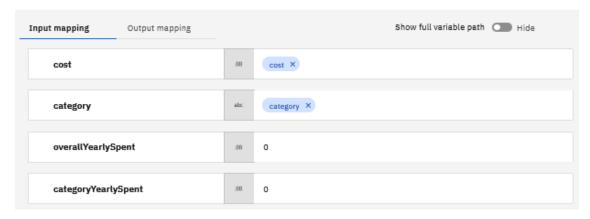
_9. For the category input variable, click the Select a variable icon.



_10. Select the existing variable category.



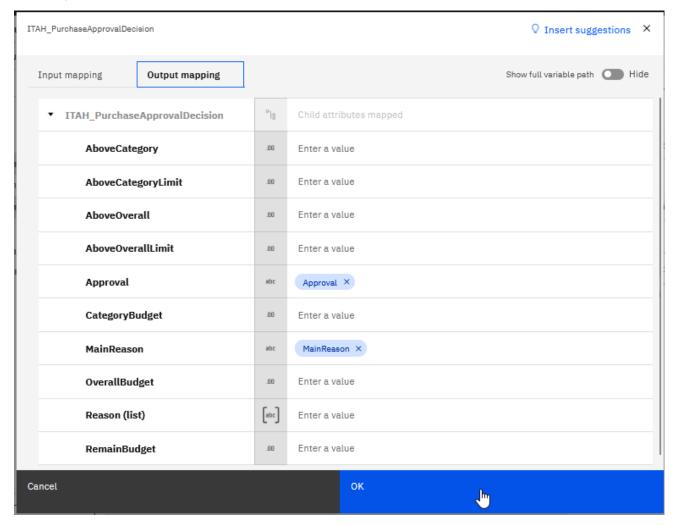
- _11. For overallYearlySpent, enter 0.
- _12. For categoryYearlySpent, enter 0.
- _13. Verify that the mapping looks as shown below.



_14. Click the Output mapping tab.



- _15. Repeat steps 8-9 to create and map the following new variables:
 - Approval
 - MainReason
- _16. Verify that the output mapping looks as shown below, then click **OK** to save and close the mapping editor.

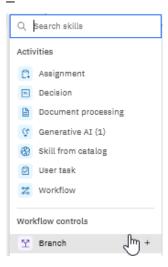


5.2.3 Add "Manager Approval Required" Branch

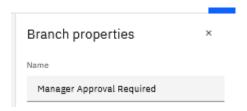
_1. Click the + icon on the line leading to the Activity activity.



_2. Select Branch.



_3. In the Branch Properties, for Name, enter Manager Approval Required.



_4. Change Path names Path 1 to Yes and Else to No.



5. Click Edit conditions.



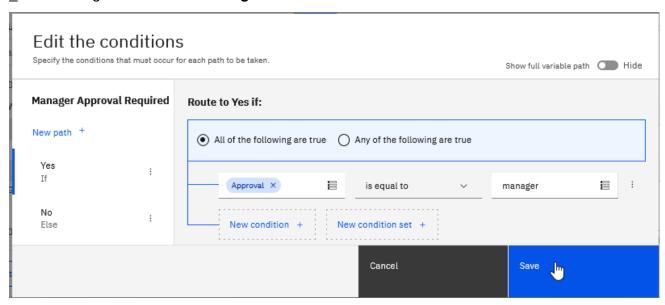
_6. Click **Select variable.**



_7. Select the **Approval** variable.



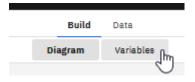
_8. Set the right-hand side to manager and click Save.



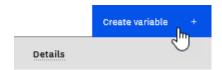
5.2.4 Create Workflow Variables

You will now create additional variables for use in the activities you will add to the Workflow in the lab steps to follow.

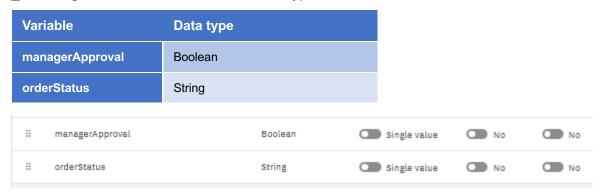
_1. Click the Variables tab.



_2. Click the Create variable + button twice.



_3. Change the variables' Name and Data type.



5.2.5 Define Workflow Input Variables

Later in this lab, you will need to enter some input variables when testing your Workflow.

- _1. In the Input column, change the *Input* settings to **Yes** for the following variables:
- userID
- category
- itemName
- cost

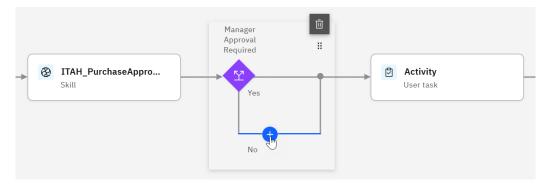


_2. Click the **Diagram** tab.

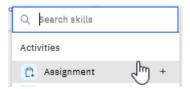


5.2.6 Add "Set Auto approved" Assignment

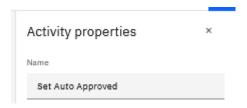
_1. Click the + icon on the line of the "No" branch.



_2. Select Assignment.



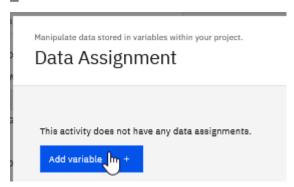
_3. In the Activity properties, for Name, enter Set Auto Approved.



_4. In Activity properties, click Define data assignment.



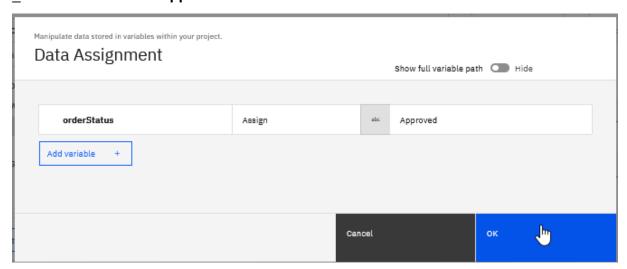
_5. Click Add variable +.



_6. Select the **orderStatus** variable.



_7. Set orderStatus to Approved and click OK.

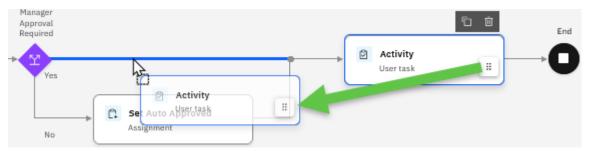


5.2.7 Create "Manager Review" User Task

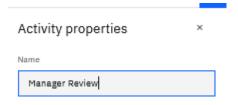
_1. Position the mouse on the **Activity's move handle** (six dots in the lower right corner).



_2. Click and **hold the left mouse button**, then **move** the *Activity* to the *Yes branch*. The line color will change to blue.



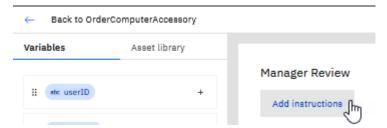
_3. In the Activity properties, for Name, enter Manager Review.



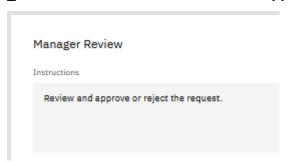
_4. In the Activity properties, click Edit user interface.



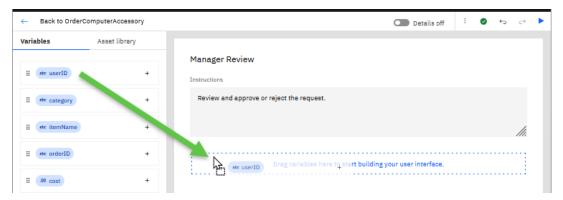
_5. Click the **Add instructions** link.



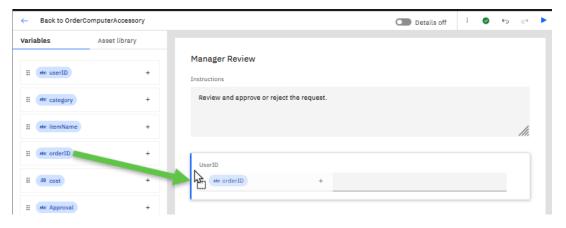
6. For Instructions, enter Review and approve or reject the request.



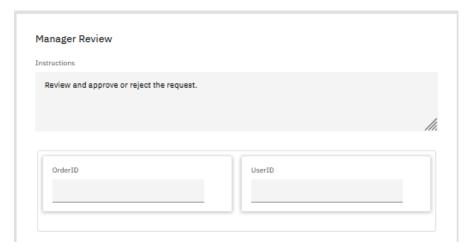
_7. Drag and Drop the userID variable.



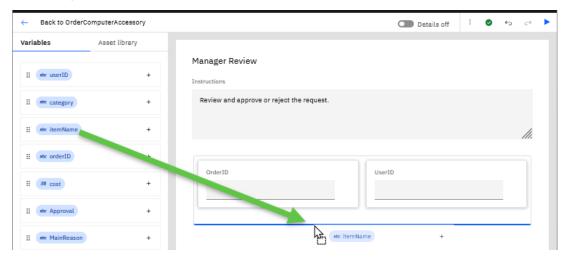
_8. Drag and Drop the **orderID** variable to the left of the blue vertical line.



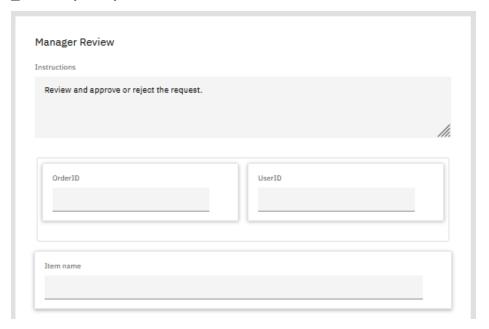
_9. Verify that your UI looks as shown below.



_10. Drag and Drop the **itemName** below the blue line.

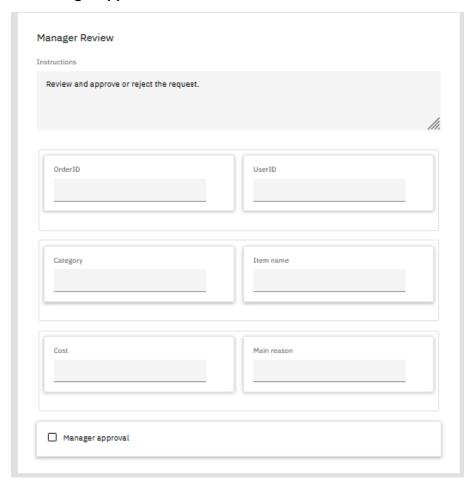


_11. Verify that your UI looks as shown below.



_12. Add to the UI the variables listed below and ensure the UI looks as shown below:

- category
- MainReason
- cost
- managerApproval



5.2.8 Customize "Manager Review" User Task UI

The UI Editor provides advanced widget customization capabilities and a preview functionality. See the figure below.

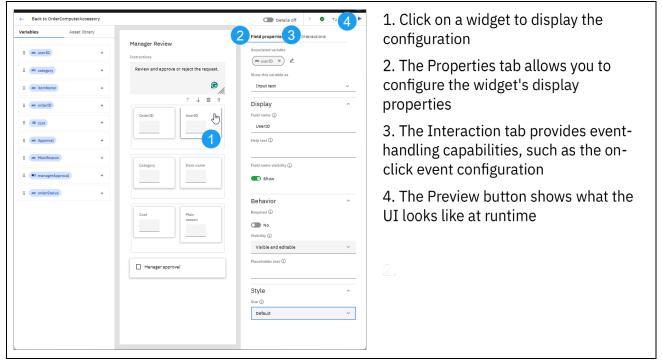


Figure 2. User Task UI Customization Capabilities

Next, you will perform some simple customization tasks.

_1. Click the OrderID widget.



2. In the Field properties pane for Visibility, select Visible and read-only.

This will make the Order ID field read-only..

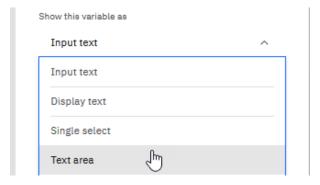


- _3. Repeat steps 1-2 to make the following fields read-only as well:
- UserID
- Category
- Item name
- Cost
- Main reason
- _4. Click the **Main reason** widget.

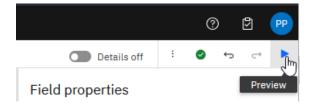


_5. In the Field properties pane for Show this variable as select **Text area**.

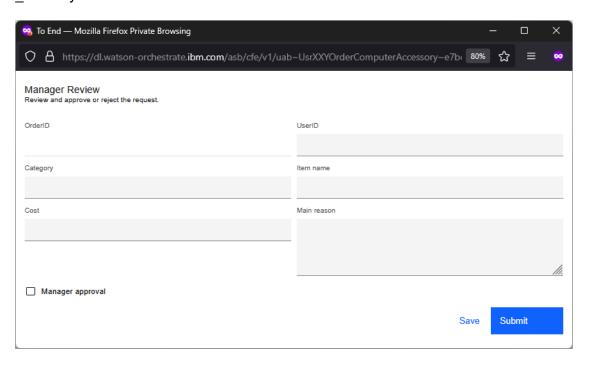
This will display the entire field text, even if it spans multiple lines.



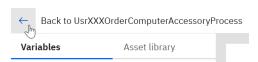
6. Click the Preview button.



_7. Verify that the UI looks as shown below.

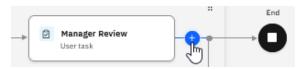


- _8. Click **X** to close the preview web browser page.
- _9. Click the **back arrow** to get back to the Workflow Editor.

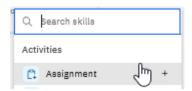


5.2.9 Add "Set Order Status" Assignment

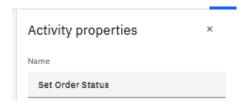
_1. Click the + icon on the line emerging for the Manager Review activity.



_2. Select Assignment.



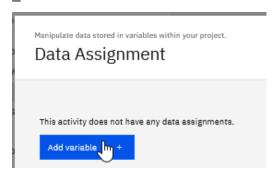
_3. In the Activity properties, for Name, enter Set Order Status.



_4. In the Activity properties, click Define data assignment.



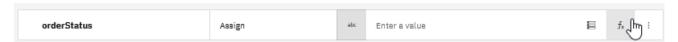
5. Click Add variable +.



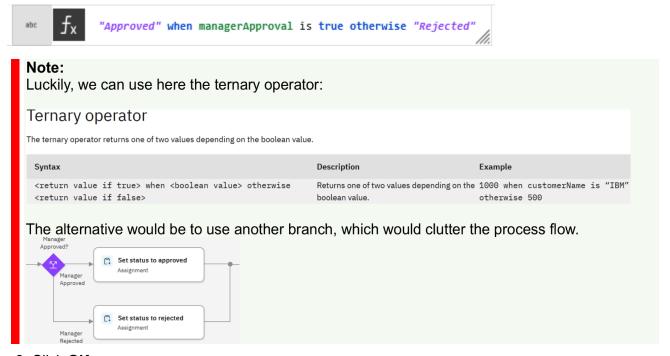
_6. Select the **orderStatus** variable.



7. Click the fx icon.



_8. Set orderStatus to "Approved" when managerApproval is true otherwise "Rejected".



_9. Click **OK.**

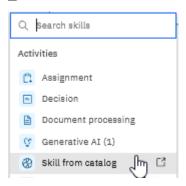


5.2.10 Add "ITAH_ChangeOrderStatus" Skill

1. Click the **+ icon** on the line right before the End Activity.



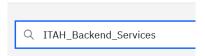
_2. Select Skill from catalog.



_3. In the search bar, type ITAH_Backend_Services, and press enter.

Choose a skill from the list to invoke

Add a skill



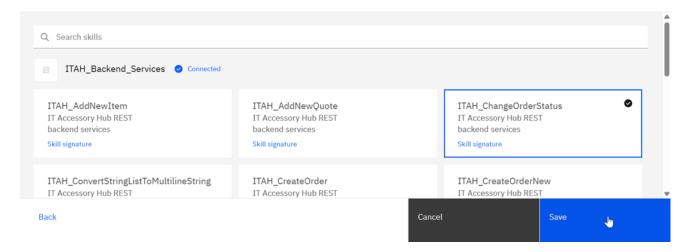
_4. Click the ITAH_Backend_Services tile.



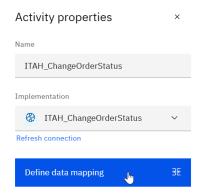
_5. Select the ITAH_ChangeOrderStatus skill and click Save.

Choose a skill from the list to invoke

Add a skill



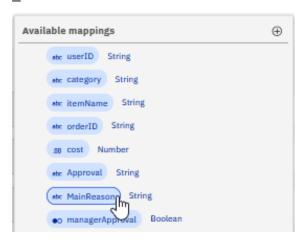
_6. Click **Define data mapping.**



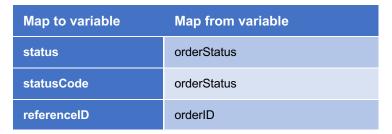
_7. To map the *reason* variable, click **Select a variable** icon.



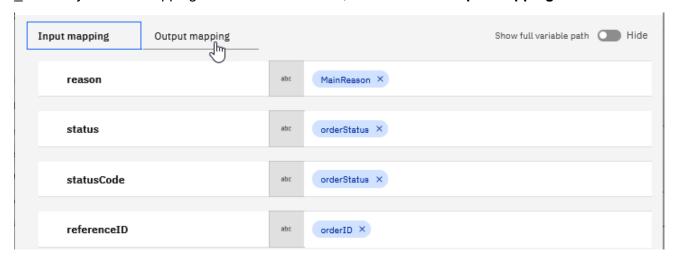
_8. Select the MainReason variable.



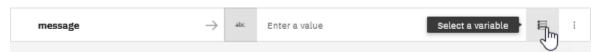
_9. Repeat steps 7-8 to map the following variables:



_10. Verify that the mapping looks as shown below, then click the **Output mapping** tab.



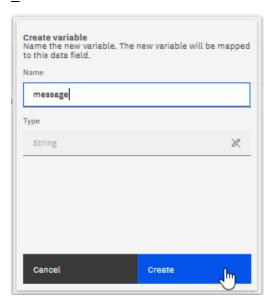
_11. For message, click the Select a variable icon.



_12. Click Create variable + icon.



_13. Click the Create button.

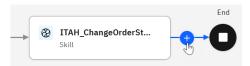


_14. Click **OK** to save and close the mapping editor.

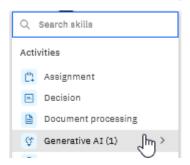


5.2.11 Add "Generate Notification Email Generative Al" Skill

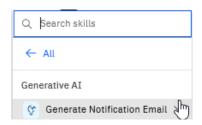
_1. Click the **+ icon** on the line right before the End Activity.



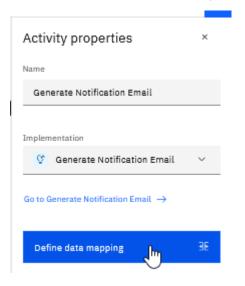
2. Select Generative Al (1).



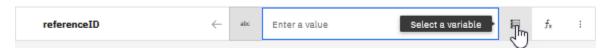
3. Select Generate Notification Email.



_4. Click Define data mapping.



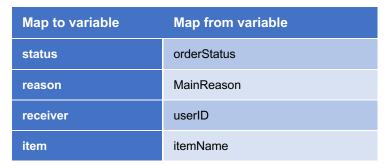
5. To map the *referenceID* variable, click the **Select a variable** icon.



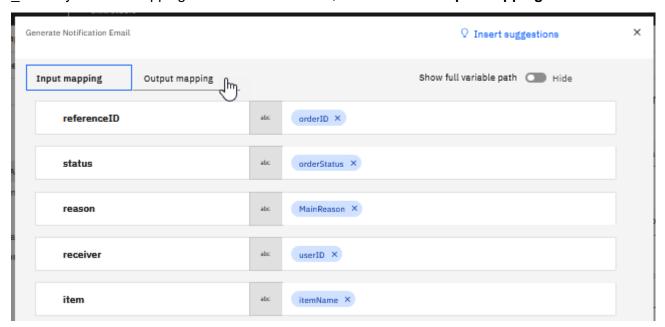
_6. Select the **orderID** variable.



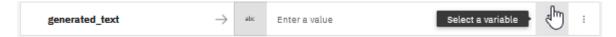
_7. Repeat steps 5-6 to map the following variables:



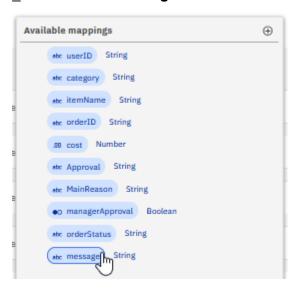
_8. Verify that the mapping looks as shown below, then click the Output mapping tab.



_9. For generated_text, click Select a variable icon.



_10. Select the **message** variable.

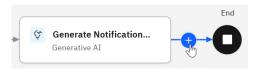


_11. Click **OK** to save and close the mapping editor.

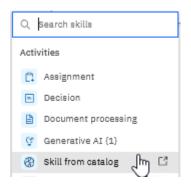


5.2.12 Add "ITAH_SendEmail" Skill

_1. Click the + icon on the line right before the End Activity.



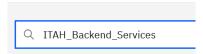
_2. Select Skill from catalog.



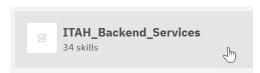
_3. In the search bar, type ITAH_Backend_Services, and press enter.

Choose a skill from the list to invoke

Add a skill



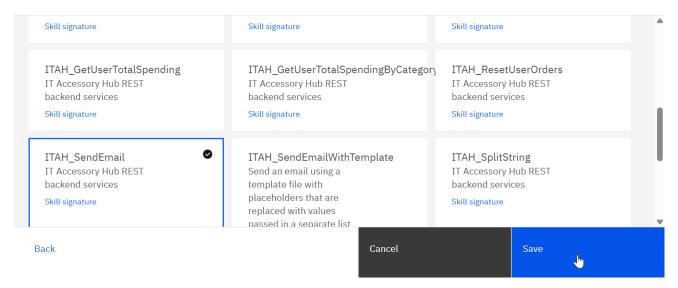
_4. Click the ITAH_Backend_Services tile.



_5. Select the **ITAH_SendEmail** skill and click **Save**.

Choose a skill from the list to invoke

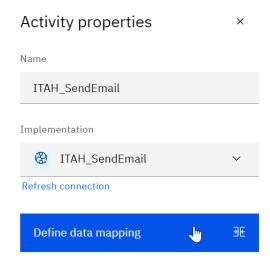
Add a skill



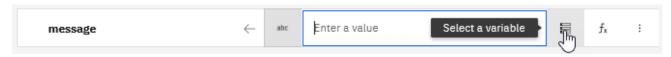
Note: If you cannot find it, click the page arrow in the lower right corner to go to page 2.



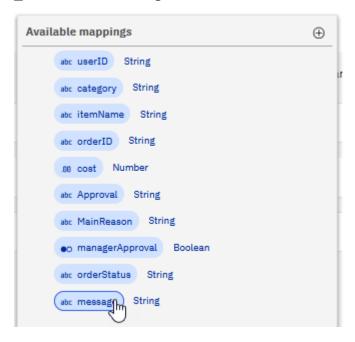
6. Click **Define data mapping.**



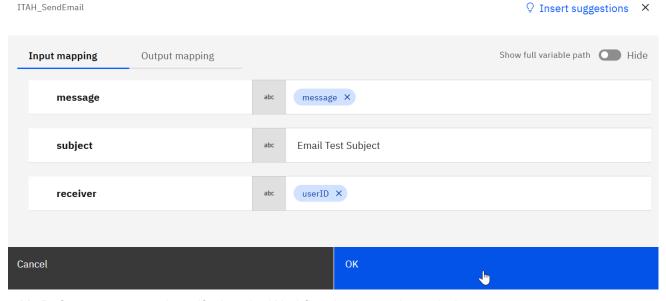
7. For message, click Select a variable icon.



8. Select the **message** variable.



- _9. Repeat steps 7-8 to map receiver to userID.
- _10. For subject set the text Email Test Subject.
- _11. Verify that the mapping looks as shown below and click OK.



_12. Before you proceed, verify that the Workflow looks as shown below.



5.3 Test the Workflow

There are two paths in this Workflow:

- 1. The manager approves/rejects the order human intervention is required.
- 2. The order was auto-approved straight through, no human intervention is needed.

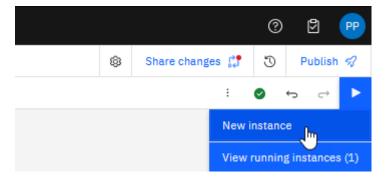
The table below shows the values of the Workflow input variables used to test each path.

Path	userID	category	itemName	cost
1	*	mouse	Razer Basilisk V3 Customizable Ergonomic Mouse	85.21
2	*	mouse	Logitech G305 LIGHTSPEED Wireless Mous	39.48

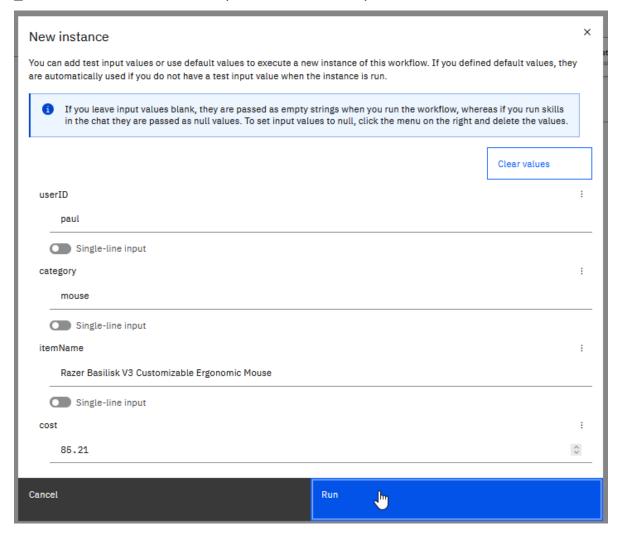
^{*} Use the lab user ID you received, for example, usr001.

5.3.1 Start Workflow

_1. Click the **Preview** (play icon) button in the top right corner and select **New instance**.



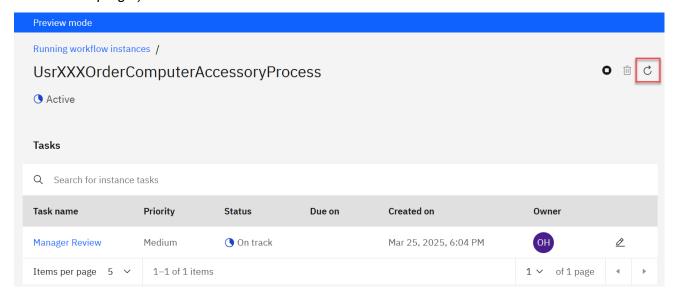
_2. Enter the values for Path 1 (see the table above) and click Run.



Shortly after you have clicked on Run, a new window opens.

5.3.2 Complete "Manager Approval" Task

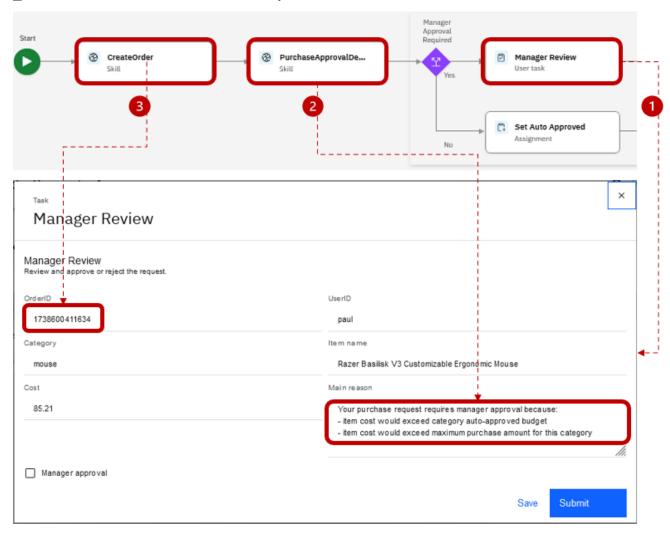
_1. **Wait** until you see a **Manager Review** task in the *Tasks list (you may need to click the refresh icon in the top right).*



_2. Click the Manager Review link.

Task name	Priority	Status	Due on	Created on	Owner	
Manager Rewiew	Medium	On track		Mar 25, 2025, 5:35 PM	ОН	<u>Ø</u>

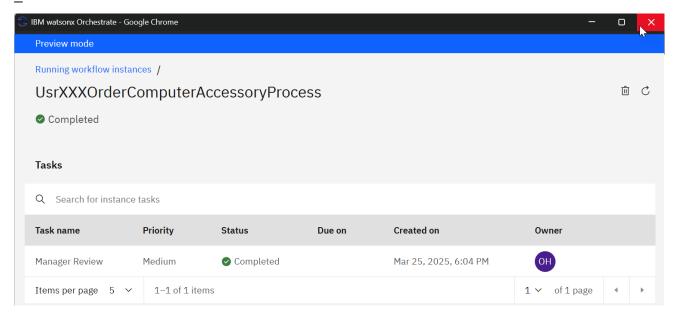
_3. Examine the UI and how it relates to your Workflow.



- 1. Recall that this is the Manager Review UI you authored
- 2. The "Main reason" message and the decision to require manager approval came from the PurchaseApprovalDecsion decision skill
- 3. The OrderID value came from the CreateOrder skill
- _4. Select Manager approval and click Submit.

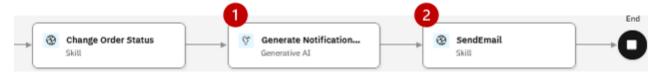


5. Click **X** to close the Web Browser window.

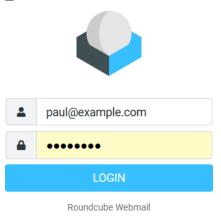


5.3.3 Examine the Email

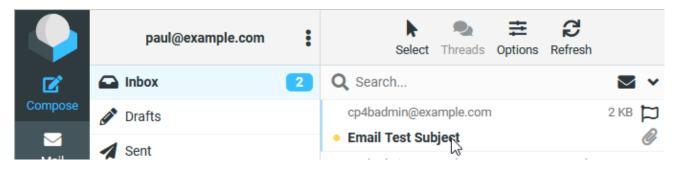
Recall that the last step in the process was to email (2) the user requesting a computer part, and the Gen AI skill generated the email text (1).



- _1. Open the link you got to the web-based email client in your browser.
- _2. Log in with the back-end user ID and the password you received.
- _3. Note that the user ID should be in the format usrXXX@example.com.



_4. Click Email Test Subject.



5. Verify that the email looks similar to this.

Email Test Subject 🔼



From cp4badmin@example.com on 2025-01-24 13:09

🔽 Details 🚯 Headers 🗮 Plain text

Hi Paul,

We are writing to inform you that your order request for Razer Basilisk V3 Customizable Ergonomic Mouse with reference ID 1737736340493 has been approved.

Reason for the approval: Your purchase request requires manager approval because: - item cost would exceed category auto-approved budget - item cost would exceed maximum purchase amount for this category.

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

Best regards,

FocusCorp Team

Since Gen AI created the email, the exact wording may vary, but it should be consistent with the Prompt you used to generate it.

```
please write a status update email about the order request in simple html
document, order item is {{item}} and referenceID is {{referenceID}}, its status
is {{status}} due to the reason of {{reason}}. the receiver is {{receiver}}.
We could be reached via email (focuscorp@example.com) for any other queries.
please include the contents in <html></html> only. If reason contains auto-
approved, please include "Reason for the approval: cost is within the budget and
was therefore auto approved" in the email text.
```

5.3.4 Optionally Test the Straight through Process Path

Use the data below to start the Workflow.

Path	userID	category	itemName	cost
2	*	mouse	Logitech G305 LIGHTSPEED Wireless Mouse	39.48

^{*} Use the lab user ID you received, for example, usr001.

- _2. As this request does not require manager approval, you can close the newly opened Tasks list window immediately.
- _3. If necessary, click on Refresh in your email client's inbox. You should find another email with the Subject "Email Test Subject".
- _4. Verify that the email looks similar to this.



Order Request Status Update

Dear Paul,

We are pleased to inform you that your order request for Logitech G305 LIGHTSPEED Wireless Mouse has been approved.

Reference ID: 1738586609150

Reason for the approval: cost is within the 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 Team

Congratulations, you have completed this lab.

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