

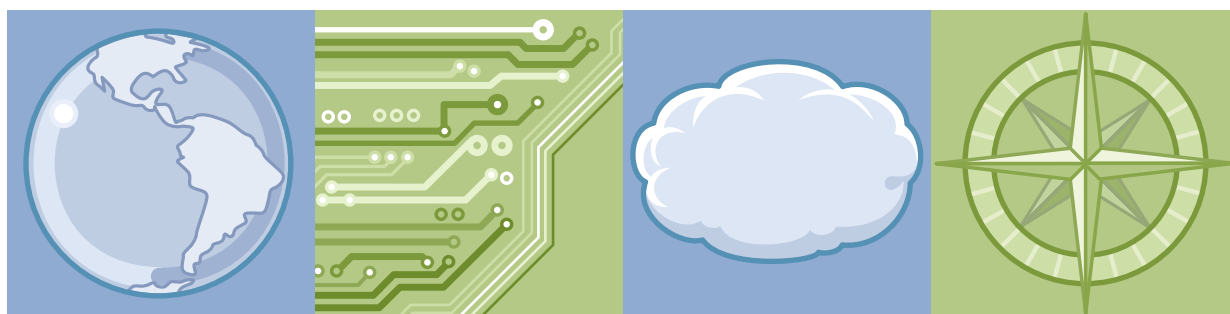


# IBM Training

Student Notebook

## IBM Blueworks Live Account Administration

Course code ZB030 ERC 2.0



IBM Systems  
Middleware

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# Exercises description

This course includes the following exercises:

- Exercise 1. Creating a space and managing users
- Exercise 2. Customizing an account
- Exercise 3. Managing the glossary
- Exercise 4. Deleting an attachment in a project
- Exercise 5. Capturing a policy in a Blueworks Live blueprint
- Exercise 6. Conducting a playback

In the exercise instructions, you can check off the line before each step as you complete it to track your progress.

Most exercises include required sections which should always be completed. It might be necessary to complete these sections before you can start later exercises. Some exercises might also include optional sections that you might want to complete if you have sufficient time and want an extra challenge.





# Exercise 1. Creating a space and managing users

## What this exercise is about

In this exercise, you grant specific task-based permissions to users in a space that you create.

## What you should be able to do

After completing this exercise, you should be able to:

- Create a space in a Blueworks Live account
- Grant task-based permissions to users with specific roles in a space

## Introduction

Blueworks Live provides individual project containers called spaces. Space managers with the appropriate permission create and modify spaces. The space manager sets the space users' task-based permissions.

## Requirements

This exercise requires an administrator level account access. An Editor license type access can create some tasks. However, many tasks are restricted to an account administrator access level.

## Exercise instructions

### Preface

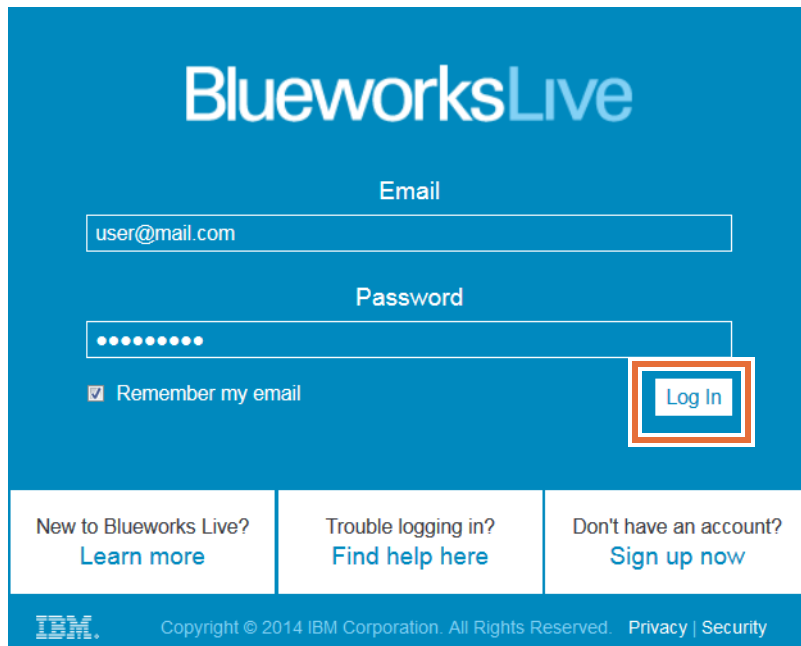
This exercise depends on a Blueworks Live account access.

### Part 1: Create a space

- \_\_\_ 1. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
<https://www.blueworkslive.com/>
  - \_\_\_ b. Click **Log In** on the upper-right corner of the window.



- \_\_\_ c. Enter the account email address, password, and click **Log In**.



The login page for BlueworksLive has a blue header with the logo. Below it are fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). A 'Remember my email' checkbox is checked. A 'Log In' button is highlighted with a red rectangle. At the bottom, there are three links: 'New to Blueworks Live? Learn more', 'Trouble logging in? Find help here', and 'Don't have an account? Sign up now'. The footer includes the IBM logo and copyright information.

#### Latest news...

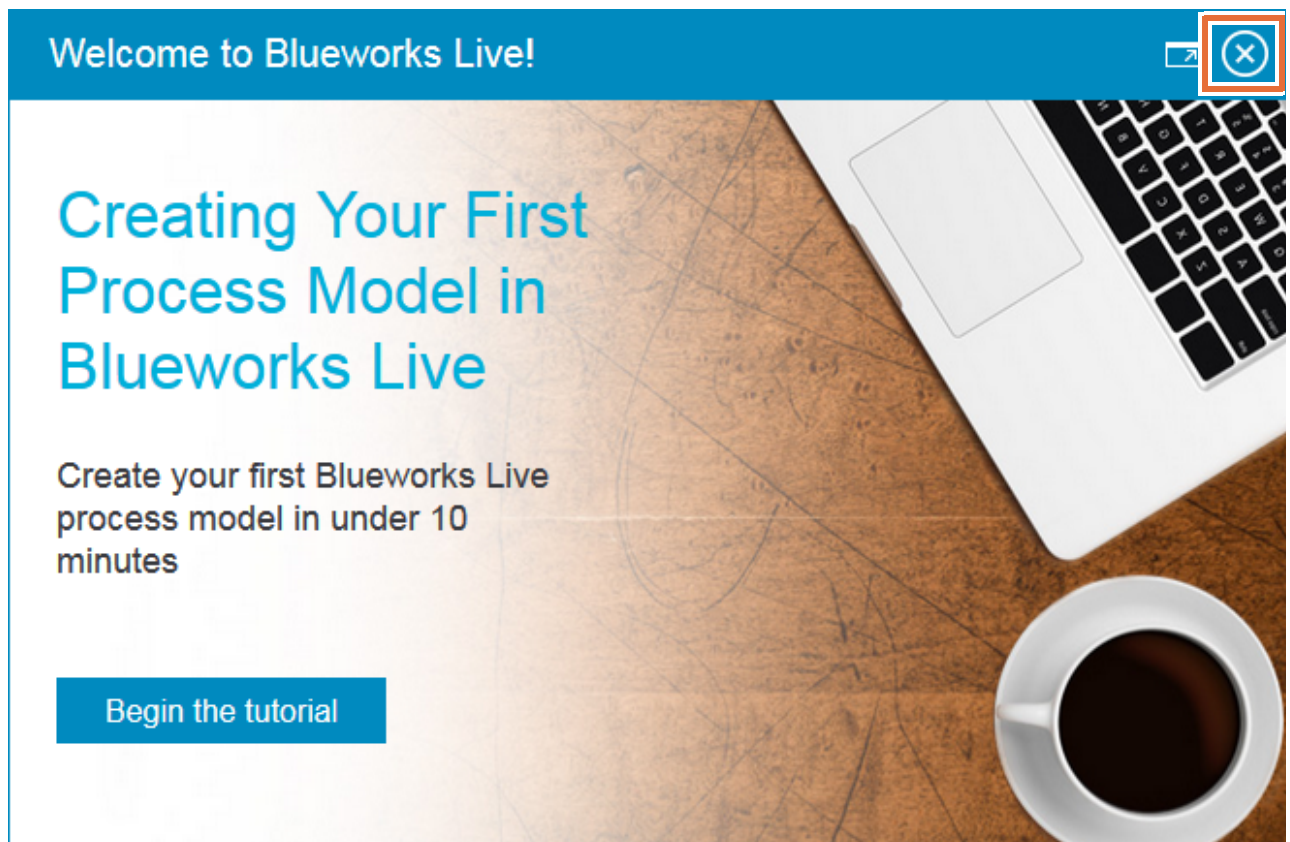
The [December 2015 release](#) is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

The [February 2015 release](#) is here with diagramming productivity and layout enhancements, Help link for Viewers, and filtering on the User Management page of the Admin console.

The [November 2014 release](#) is here with alternative start events, Viewer and Contributor enhancements, and support for Visio 2013 and IE10.

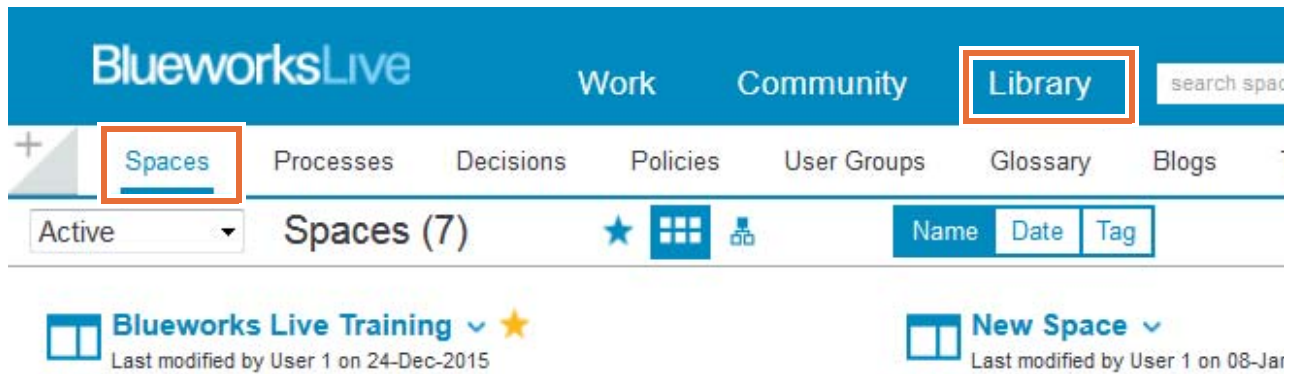
The [August 2014 release](#) is here with a new look and feel.

- \_\_\_ 2. Close the welcome screen by clicking **X** at the upper-right corner of the welcome screen.

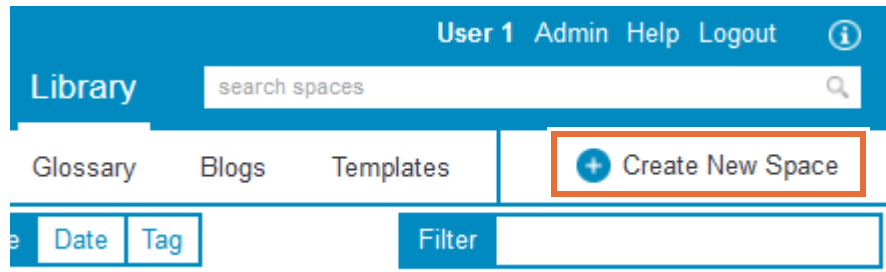


- \_\_\_ 3. Create a space in the Blueworks Live account space repository.
- \_\_\_ a. Click the **Library** tab at the top of the Blueworks Live home page.

- \_\_\_ b. Click the **Spaces** tab on the left side of the row of section tabs.



- \_\_\_ c. Click **+ Create New Space** on the right side of the page.



- \_\_\_ d. Click the **Space Name** entry in the “Create a New Space” dialog box.
- \_\_\_ e. Enter the name of the new space: New Space
- \_\_\_ f. Leave the default value for the **Where to add this new space** entry.
- \_\_\_ g. Click **Create Space** to complete the new space creation.

## Create a New Space

What would you like to call the space you are creating?

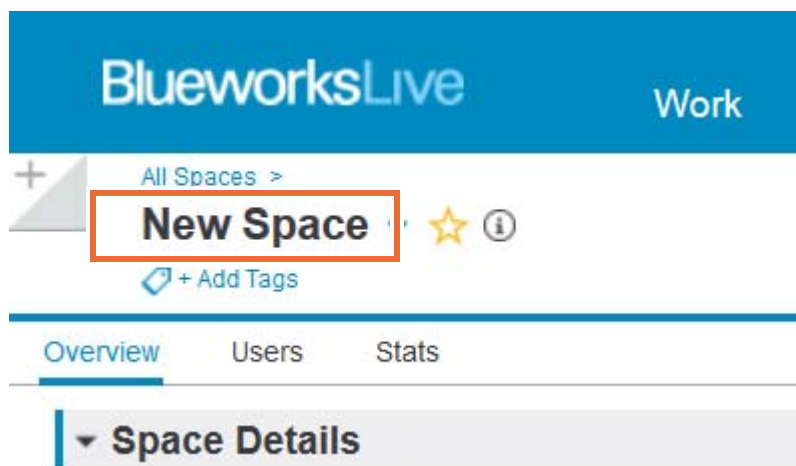
Space Name

Where to add this new space

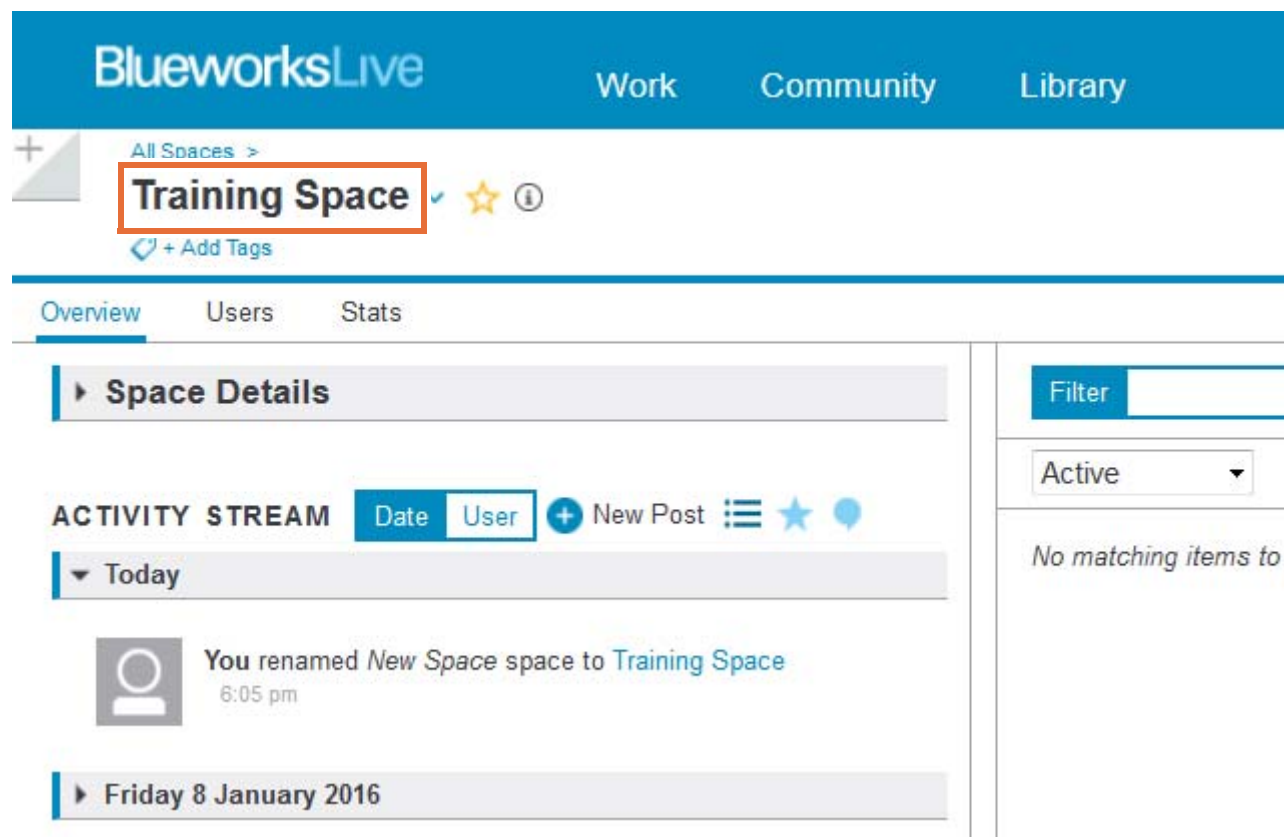
Create Space

## Part 2: Modify the space information

- \_\_\_ 1. Change the space name.
  - \_\_\_ a. The New Space page is created. Click the name of the space to highlight the area.

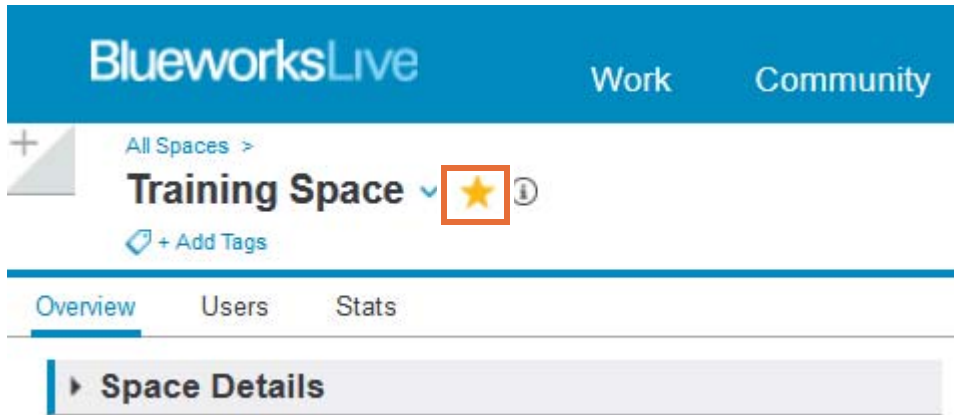


- \_\_\_ b. Change the name of the space to: Training Space

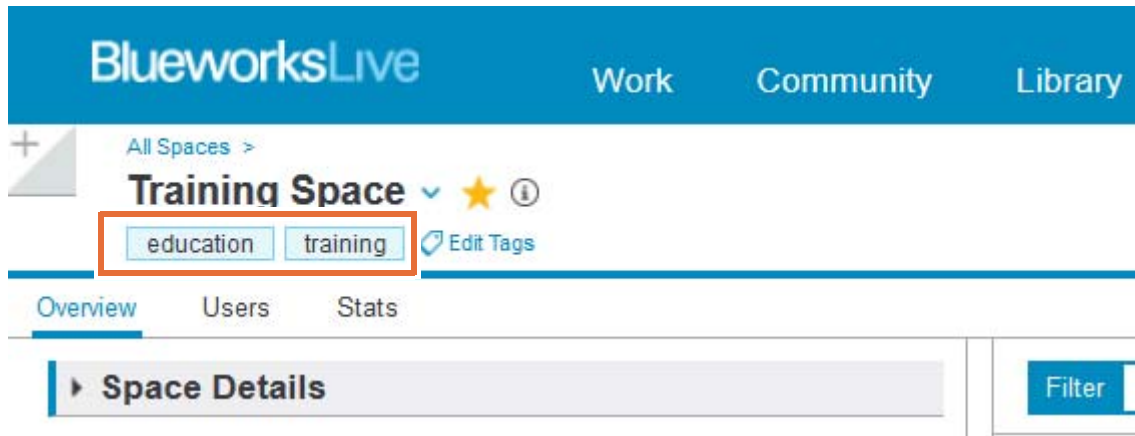


- \_\_\_ 2. Create the space part of the **I'm Following** space repository.
  - \_\_\_ a. Click the star next to the space name.

- \_\_\_ b. Verify that the star changed color to signify that the space is now part of the **I'm Following** spaces.



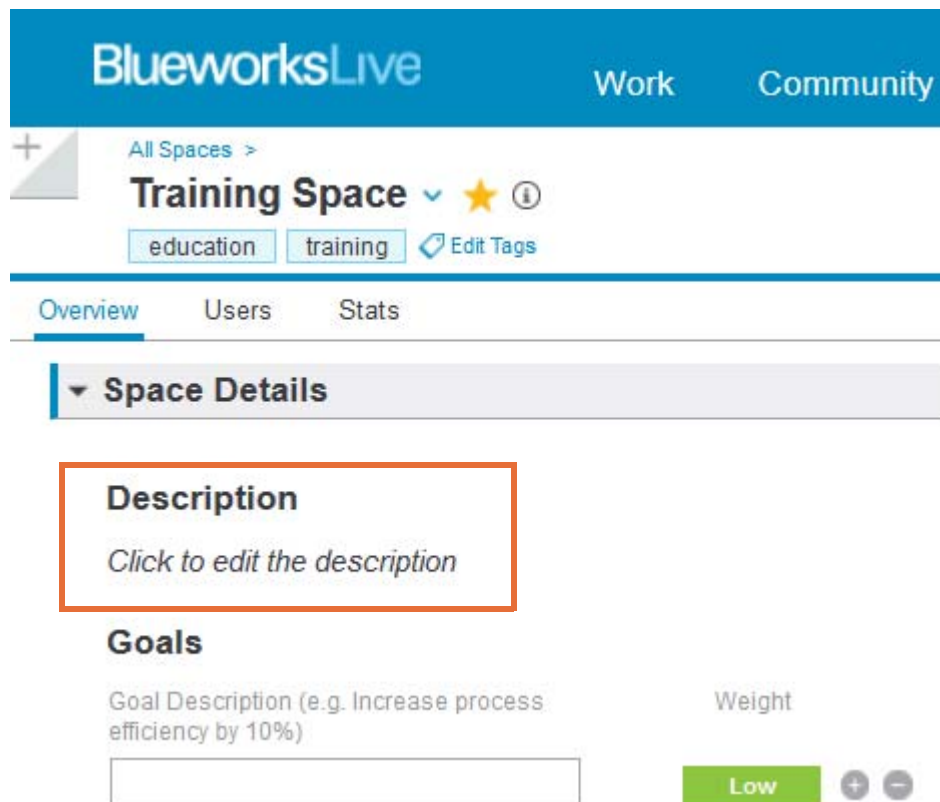
- \_\_\_ 3. Add tags to the space.
- \_\_\_ a. Click **Add Tags** below the space name.
- \_\_\_ b. Type `education` followed with a comma.
- \_\_\_ c. Type `training` in the next entry box and press Enter to finish adding tags.



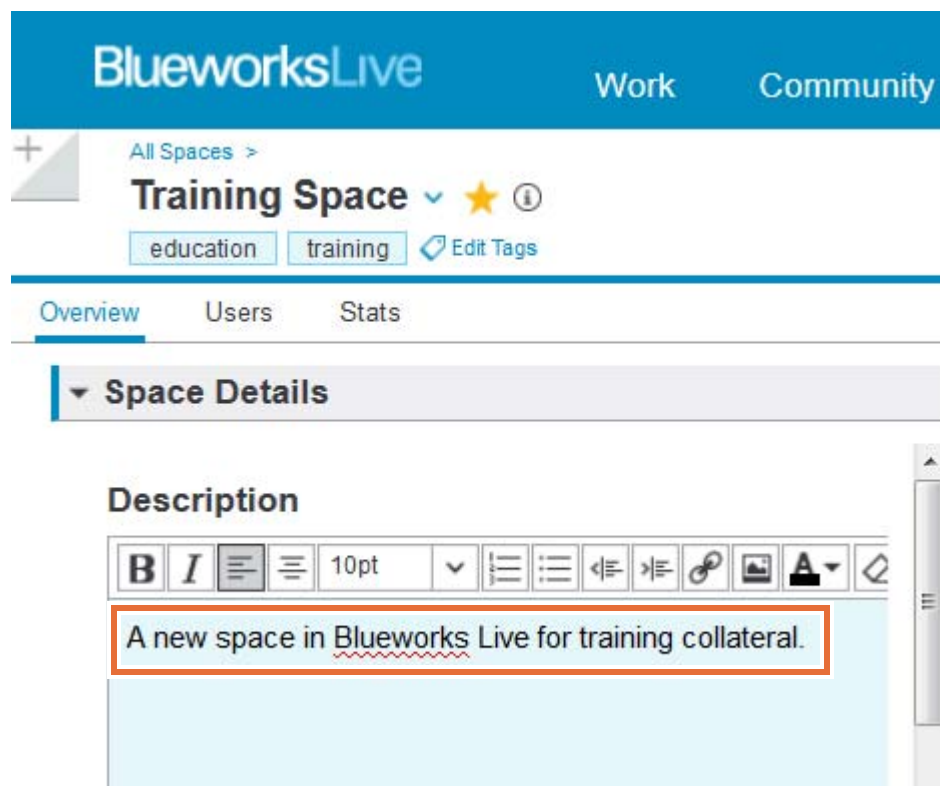
- \_\_\_ d. Verify the two tags for the space: *education* and *training*.
- \_\_\_ 4. Add details to the space.
- \_\_\_ a. Verify that you are in the **Overview** section of the *Training Space*.



- \_\_\_ b. Expand the **Space Details** section and click the **Description** area to access the editor.



- \_\_\_ c. Type the following description: A new space in Blueworks Live for training collateral.



- \_\_\_ d. Click outside the editor to save the description.
- \_\_\_ 5. Add goals to the space.
  - \_\_\_ a. Click the **Goals** field.
  - \_\_\_ b. Type the following goal and press Enter: Learn Blueworks Live administration
  - \_\_\_ c. Click the **Weight** icon to the right of the entry until it is set to *High*.

Overview Users Stats

▼ Space Details

**Description**

A new space in Blueworks Live for training collateral.

**Goals**

Goal Description (e.g. Increase process efficiency by 10%)

Learn Blueworks Live administrati

Weight

High + -

- \_\_\_ d. Click the + (plus sign) next to the weight. A new field is displayed.

**Goals**

Goal Description (e.g. Increase process efficiency by 10%)

Learn Blueworks Live administrati

Weight

High + -

- \_\_\_ e. Type the next goal and press Enter: Learn about Blueworks Live enhancements



- \_\_\_ f. Click the **Weight** icon to the right of the entry until it is set to *Medium*.

Overview Users Stats

▼ **Space Details**

**Description**

A new space in Blueworks Live for training collateral.

**Goals**

Goal Description (e.g. Increase process efficiency by 10%) Weight

Learn Blueworks Live administrative tasks	High
Output Blueworks Live enhancements	Medium

### Part 3: Manage space users

- \_\_\_ 1. Add users to the space.
- \_\_\_ a. Click the **Users** tab at the top of the page.

+ All Spaces >

**Training Space** ▼ ★ ⓘ






education training Edit Tags

Overview **Users** Stats


This list defines the people and roles that can participate in this space user by selecting the appropriate check boxes.

- \_\_\_ b. Click **+ Add** on the right side of the space participant page.



participate in this space and with the items it contains. You can further control the permissions for each

						 Add
Blueprint Processes	Automate Processes	Compose Decisions	Author Policies	Manage and Edit Space	Remove	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
						

- \_\_\_ c. Click **All Admins** on the list to add it to the space. This action removes the name from the **Add Participants** list.

Add Participants 

Filter

 All Admins
 

- \_\_\_ d. Click **X** to close the Add Participants dialog box.

Add Participants 

Filter

- \_\_\_ 2. Assign space task permissions for users.
  - \_\_\_ a. Select the **Manage and Edit Space** check box for the All Admins participant added to the table to enable the space management task for the participant.

All Spaces > **Training Space**

education training Edit Tags

Overview **Users** Stats

This list defines the people and roles that can participate in this space and with the items it contains. You can further control the per each user by selecting the appropriate check boxes.

**PARTICIPANTS**

Type	Name	Blueprint Processes	Automate Processes	Compose Decisions	Author Policies	Manage and Edit Space
	User 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	All Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	All Contributors		<input checked="" type="checkbox"/>			<input type="checkbox"/>
	All Community					
	All Admins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- \_\_\_ 3. Remove a user from the space.
  - \_\_\_ a. Click the **X** icon for the **All Contributors** participant to remove it from the table.

All Spaces > **Training Space**

education training Edit Tags

Overview **Users** Stats

This list defines the people and roles that can participate in this space and with the items it contains. You can further control the permissions for each user by selecting the appropriate check boxes.

**PARTICIPANTS** Add

Type	Name	Blueprint Processes	Automate Processes	Compose Decisions	Author Policies	Manage and Edit Space	Remove
	User 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	All Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	All Contributors		<input checked="" type="checkbox"/>			<input type="checkbox"/>	
	All Community						
	All Admins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



### Note

Removing users from the space does not delete users from the account. Any user that is removed from a space can be added back by repeating the steps that are provided in step 1, part 3 of this exercise.

## End of exercise

## Exercise review and wrap-up

In this exercise, a space was created in the Blueworks Live account. Space information was modified to the exact data that is required. The space was selected as a space in Followed Items for quicker access. Details such as a description and a set of goals were added to provide more information. Goals were provided, and weight was attached to each goal. Participants were added to the space for specified task management. Participants, or users, were removed from the space to complete the modifications to the space.



## Exercise 2. Customizing an account

### What this exercise is about

In this exercise, you customize a Blueworks Live account to match your organizational needs.

### What you should be able to do

After completing this exercise, you should be able to:

- Change the color scheme and update the user interface
- Customize email notification
- Enable account preferences

### Introduction

Blueworks Live allows administrators to customize accounts by setting unique preferences and custom interfaces. Customization allows organizations to set themes that match company brands.

### Requirements

This exercise requires an administrator level account access. Customization is restricted to an account that a user has the permission to modify.

## Exercise instructions

### Preface

This exercise depends on a Blueworks Live account access.

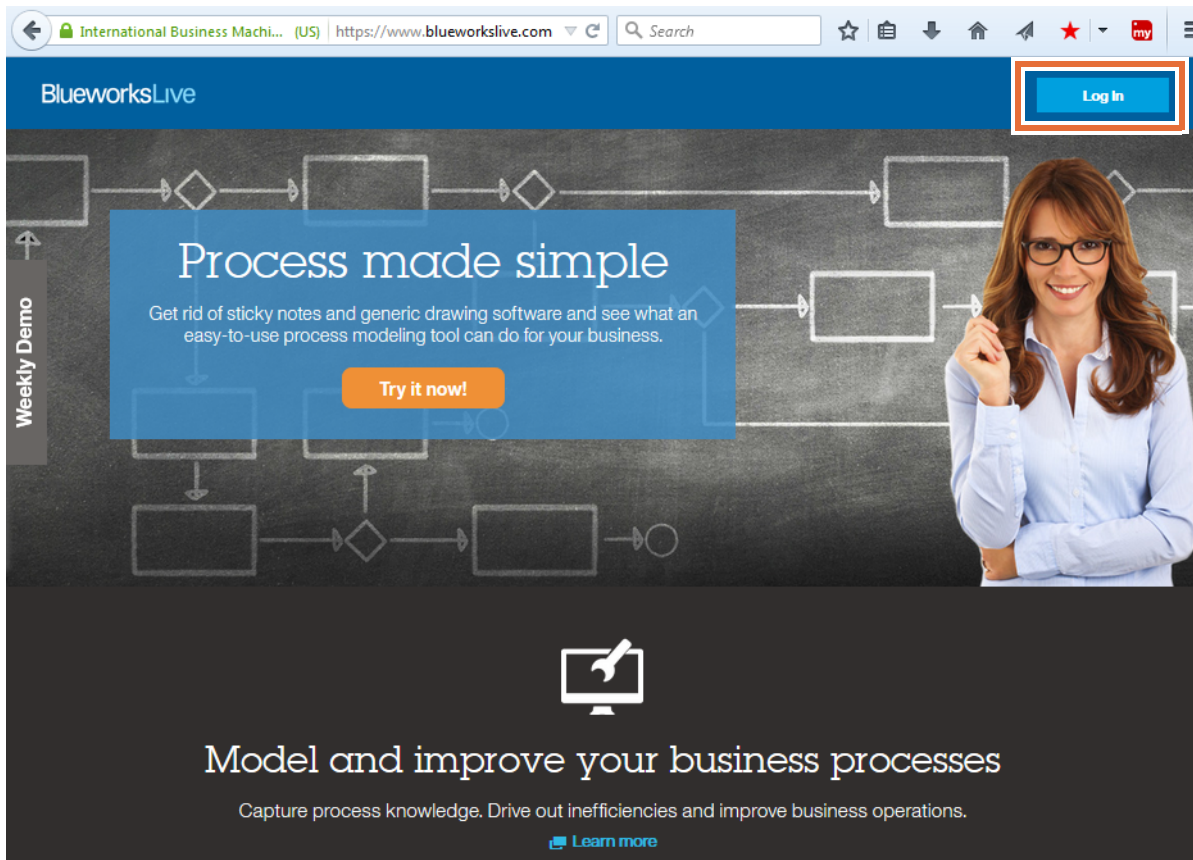
#### **Part 1: Set the default account preferences**



#### Note

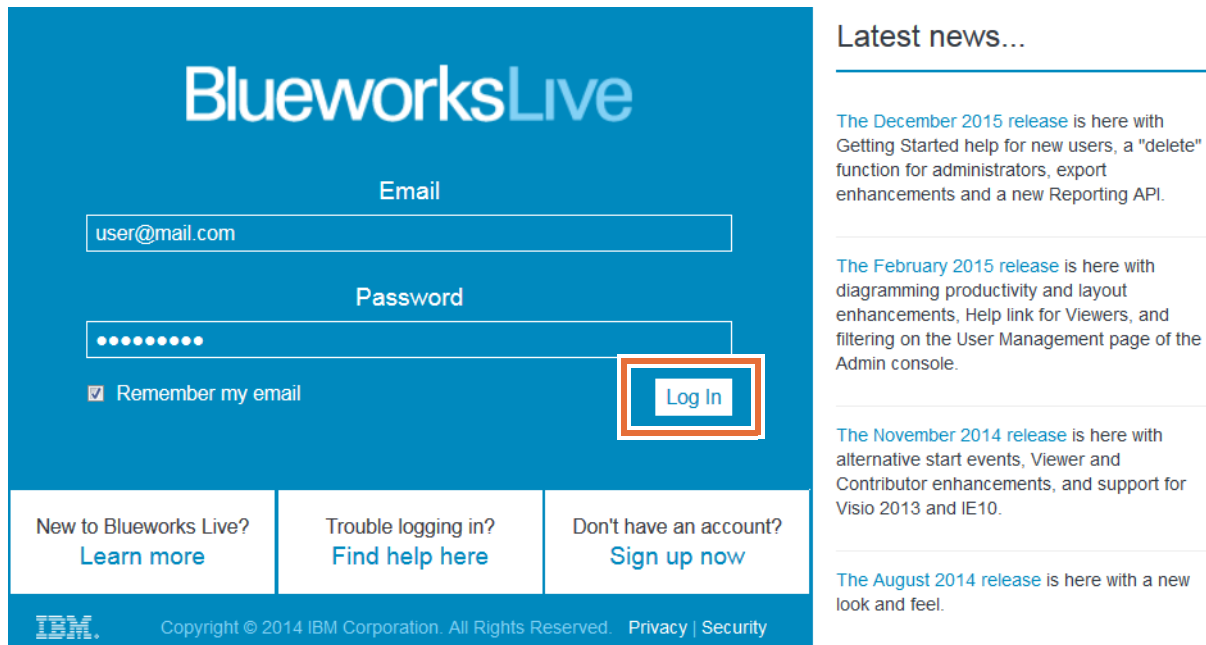
If you are already logged on to Blueworks Live from the previous exercise, skip step 1 in the exercise and proceed to step 2.

- \_\_\_ 1. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
`https://www.blueworkslive.com/`
  - \_\_\_ b. Click **Log In** on the upper-right corner of the window.





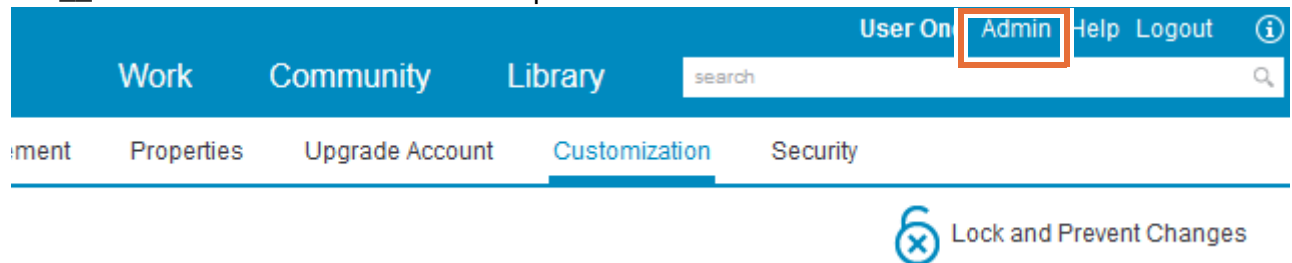
- \_\_\_ c. Enter the account email address, password, and click **Log In**.



The login page for BlueworksLive features a blue header with the logo. Below it, there are input fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). A 'Remember my email' checkbox is checked. A 'Log In' button is highlighted with an orange border. To the right, under 'Latest news...', there are three news items: 'The December 2015 release', 'The February 2015 release', and 'The November 2014 release'. At the bottom, there are links for 'New to Blueworks Live?', 'Trouble logging in?', and 'Don't have an account?'. The footer includes the IBM logo and copyright information.

- \_\_\_ 2. Access the **Customization** section.

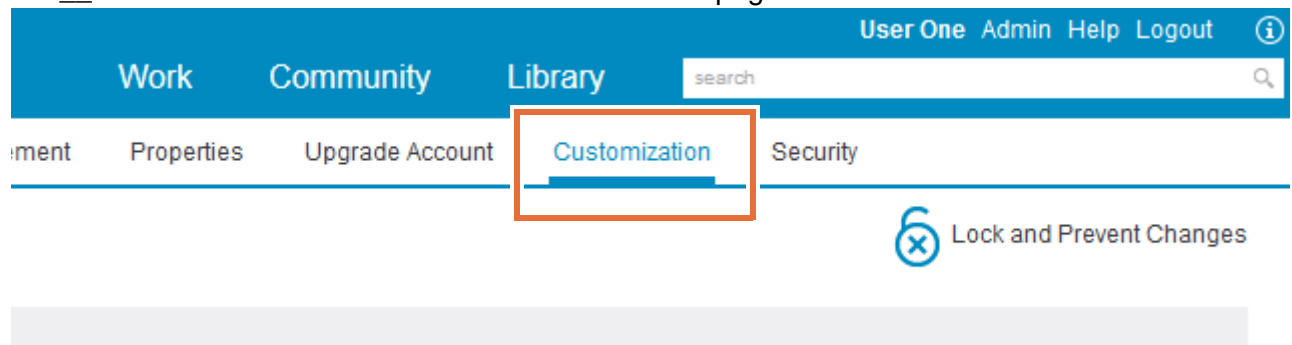
- \_\_\_ a. Click the **Admin** link at the top of the Blueworks Live interface.



### Important

The **Admin** link is visible on the Blueworks Live interface for accounts with administration rights. Check with your Blueworks Live account administrator for granting Admin rights.

- \_\_\_ b. Click the **Customization** tab on the Admin page.



- \_\_\_ 3. Set the default preferences for the account.
- \_\_\_ a. Under the **Customization > Preferences** section, select “Only **editors and admins** can invite new users”.
  - \_\_\_ b. Verify that the **Enable chat messaging** check box is selected.
  - \_\_\_ c. Verify that the **Display the Work page** check box is selected.
  - \_\_\_ d. Verify that the **Display the Public BPM Stream** check box is selected.
  - \_\_\_ e. Verify that the **Allow posting to activity streams** check box is selected.

User Management

File Management

Properties

Upgrade Account

Customization

Security

## Customization

### Preferences

Only  can invite new users

- ☒ **Enable chat messaging** (Users can send instant messages using Blueworks Live's built-in chat)
- ☒ **Display the Work page** (Users can create process apps and complete work)
- ☒ **Display the Public BPM Stream** (Users can see and search the contents of the Public BPM Stream)
- ☒ **Allow posting to activity streams** (Users can post to the private account and space streams)

- \_\_\_ f. Under the **Customization > Library** section, select the **Admins have full permissions in all spaces, all user groups and the glossary** check box.
- \_\_\_ g. Select “Only **editors and admins** can create, move, and archive spaces”.
- \_\_\_ h. Select “Only **admins** can copy spaces to other Blueworks Live account”.

### Library

- ☒ **Admins have full permissions in all spaces, all user groups and the glossary** (Admins have full permissions in all spaces, all user groups and the glossary)

Only  can create, move, and archive spaces

- ☒ **Also allow space managers to create, move and archive sub-spaces**

Only  can copy spaces to other Blueworks Live account

- \_\_\_ i. Verify that the default preferences are set.

**Note**

The customization changes made to the account preferences affects all users of the account. Changes can be made and revised at any time to the account preferences based on actual account need. This exercise is intended only to familiarize you with the options available.

## Part 2: Brand the account

- \_\_\_ 1. Add a custom logo and color scheme.
  - \_\_\_ a. Under the **Customization > Branding** section, select the **Custom logo & color scheme** check box.
  - \_\_\_ b. Click the **red block** to change the interface color scheme.

### Branding

☒ **Custom logo & color scheme** Applied to the header and footer of your account)



BlueworksLive

Upload a .jpg, .png or .gif with a transparent background.  
45px max height, 180px max width.

[Upload Logo](#) | [Text as Logo](#)

Update

- \_\_\_ c. Click the **Text as Logo** link.

BlueworksLive

Upload a .jpg, .png or .gif with a transparent background.  
45px max height, 180px max width.

[Upload Logo](#) | [Text as Logo](#)

Update

- \_\_\_ d. Enter My Blueworks Live in the **Organization Name** field.



## Note

Ignore the error message for now. It will be fixed in the next steps.

- \_\_\_ e. Select **Arial Black** for the font.
- \_\_\_ f. Select **14 pt** for the font size.
- \_\_\_ g. Click the *I* icon to change the font style to italic.

## Branding

☒ **Custom logo & color scheme** (Applied to the header and footer of your account)

Upload a 45px max

[Upload Logo](#) | [Text as Logo](#) | [Remove](#)

**Organization Name**

My Blueworks Live

Arial Black ▼ 14pt ▼ **B** *I* A ▼

**Update**

- \_\_\_ h. Click **Update** to save the changes to the logo and color scheme.
- \_\_\_ i. Verify that the changes are applied to the Blueworks Live account interface.

*My Blueworks Live* Work Community Library

User Management File Management Properties Upgrade Account **Customization** Security

## Customization

## Preferences

Only  can invite new users

- \_\_\_ j. Under the **Customization > Branding** section, clear the **Custom logo & color scheme** check box to revert to the default Blueworks Live interface.
- \_\_\_ k. Select the **Custom logo & color scheme** check box again to enable the custom branding that was set earlier.

- \_\_\_ l. Clear the **Custom logo & color scheme** check box to clear the custom settings and revert to the default Blueworks Live interface.
- \_\_\_ 2. Customize the email notification.
  - \_\_\_ a. Select the **Custom email notifications** check box.
  - \_\_\_ b. Change the email subject line to: *My Blueworks Live*
  - \_\_\_ c. Select the **Include Account Name** check box.

☐ **Custom logo & color scheme** (Applied to the header and footer of your account)

☒ **Custom email notifications** (For all user account updates and notifications)

Email subject name

My Blueworks Live

This will appear as the application name replacing  
*Blueworks Live* in the email subject and body.



Include Account Name

**My Blueworks Live IBM603 Weekly Activity**

**BlueworksLive** Weekly Activity

- \_\_\_ d. Click the **Text as Logo** link.

**My Blueworks Live IBM603 Weekly Activity**

**BlueworksLive** Weekly Activity

Here's what happened in your **My Blueworks Live IBM603** account last week.

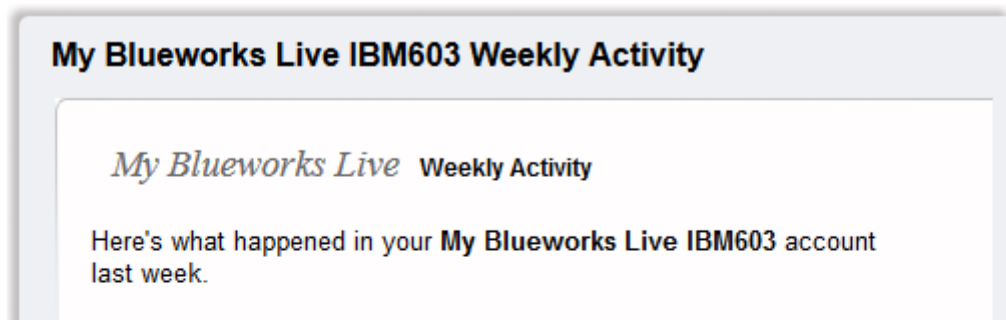
Upload a .jpg, .png or .gif with a transparent background.  
45px max height, 180px max width.

[Upload Logo](#) [Text as Logo](#)

**Update**

- \_\_\_ e. Enter *My Blueworks Live* in the **Organization Name** field.
- \_\_\_ f. Select **Arial Black** for the font.

- \_\_\_ g. Select **14 pt** for the font size.
- \_\_\_ h. Click the *I* icon to change the font style to italic.
- \_\_\_ i. Click **Update** to save the changes to email notification branding.



Upload a .jpg, .png or .gif with a transparent background.  
45px max height, 180px max width.

[Upload Logo](#) | [Text as Logo](#) | [Remove](#)

Organization Name

My Blueworks Live

Arial Black

14pt

**B**

*I*

**A**

**Update**

- \_\_\_ j. Under the **Customization > Branding** section, clear the **Custom email notifications** check box to revert to the default settings.
- \_\_\_ 3. Customize the logo on the Word export.
  - \_\_\_ a. Select the **Custom logo on Word export** check box.
  - \_\_\_ b. Click the **Text as Logo** link.
  - \_\_\_ c. Enter *My Blueworks Live* in the **Organization Name** field.
  - \_\_\_ d. Select **Arial Black** for the font.
  - \_\_\_ e. Select **14 pt** for the font size.

- \_\_\_ f. Click the *I* icon to change the font style to italic.

☒ **Custom logo on Word export** Applied to the Word export for the documentation view of a Process Blueprint)

Upload a .jpg, .png or .gif with a transparent background.  
45px max height, 180px max width.

[Upload Logo](#) | [Text as Logo](#) | [Remove](#)

**Organization Name**

My Blueworks Live

Arial Black ▼ 14pt ▼ **B** *I* A ▼

**Update**

- \_\_\_ g. Click **Update** to save the changes to email notification branding.
- \_\_\_ h. Under the **Customization > Branding** section, clear the **Custom logo on Word export** check box to revert to the default settings.

## End of exercise

## Exercise review and wrap-up

In this exercise, the account default preferences were set. Preferences include: select participants who can invite new users, enable chat messaging, display the Public BPM stream, allow posting in the activity stream, allow administrators to access all spaces and manage the glossary, select participants who can create spaces, and select participants who can copy spaces to another account. This exercise also provided instructions to brand the account with a custom logo and color scheme.



## Exercise 3. Managing the glossary

### What this exercise is about

In this exercise, you modify the glossary in Blueworks Live.

### What you should be able to do

After completing this exercise, you should be able to:

- Change glossary values in a Blueworks Live account
- Edit glossary modification permissions for users

### Introduction

In Blueworks Live, a dynamic glossary is created each time that a user adds details to process models and applications. Management of the glossary is necessary to maintain integrity in all entries. An example of one entry is *Hiring Manager* for a business role and another entry is *Hire Manager* for the same role in another process. The ability to manage the glossary allows a user to clean up the discrepancies.

### Requirements

This exercise requires the user permissions to modify the glossary.

## Exercise instructions

### Preface

This exercise depends on a Blueworks Live account access.

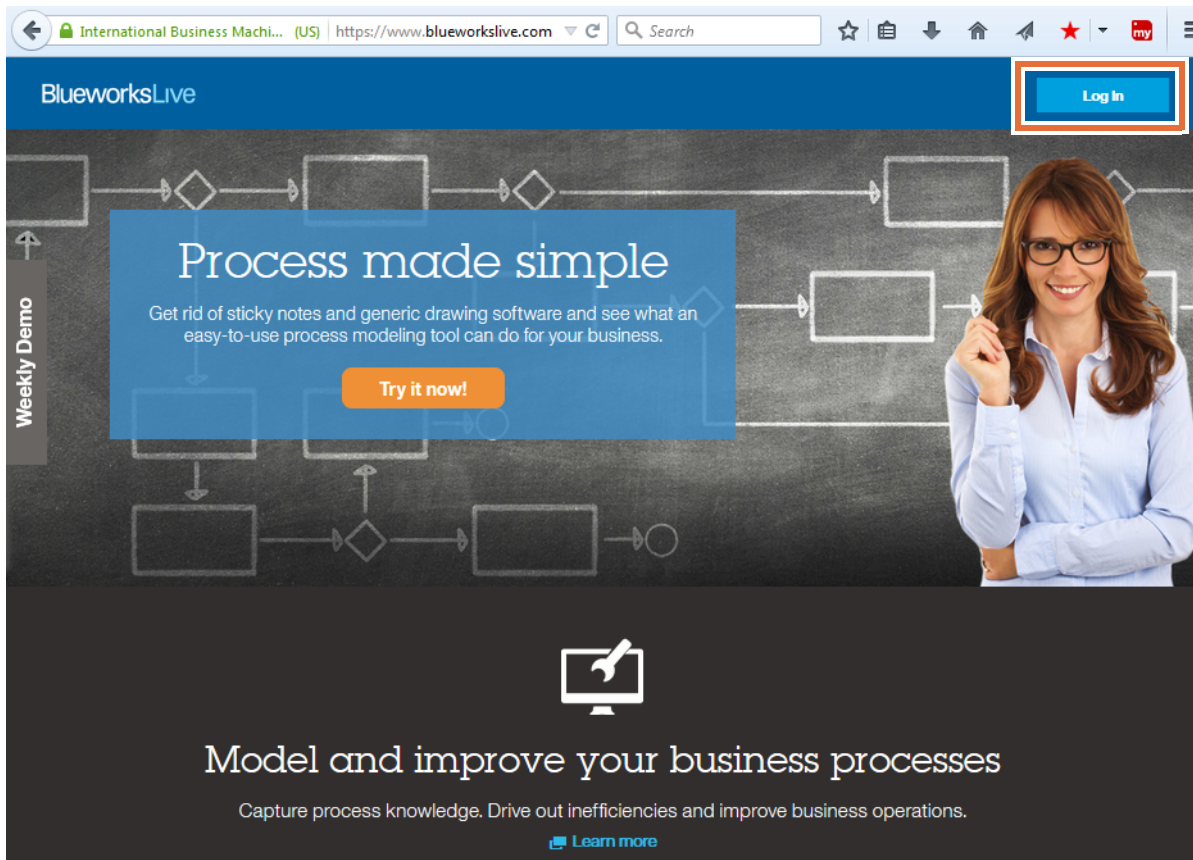
### Part 1: Create a Blueprint process



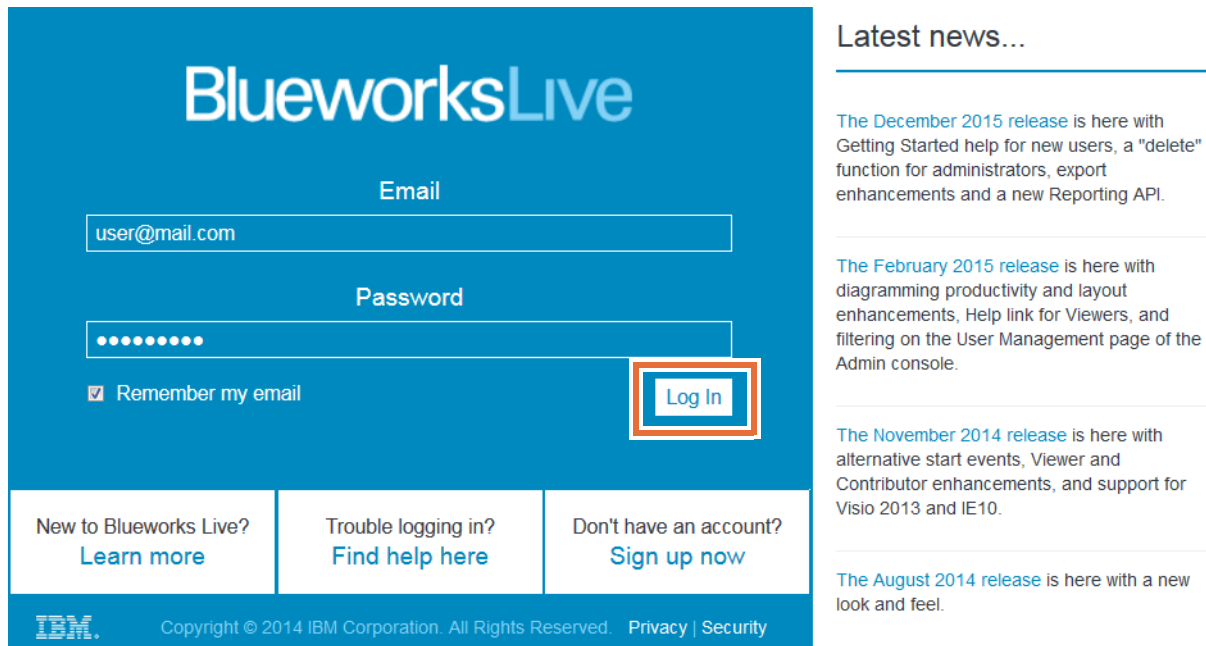
#### Note

If you are already logged on to Blueworks Live from the previous exercise, skip step 1 in the exercise and proceed to step 2.

- \_\_\_ 1. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
`https://www.blueworkslive.com/`
  - \_\_\_ b. Click **Log In** on the upper-right corner of the window.



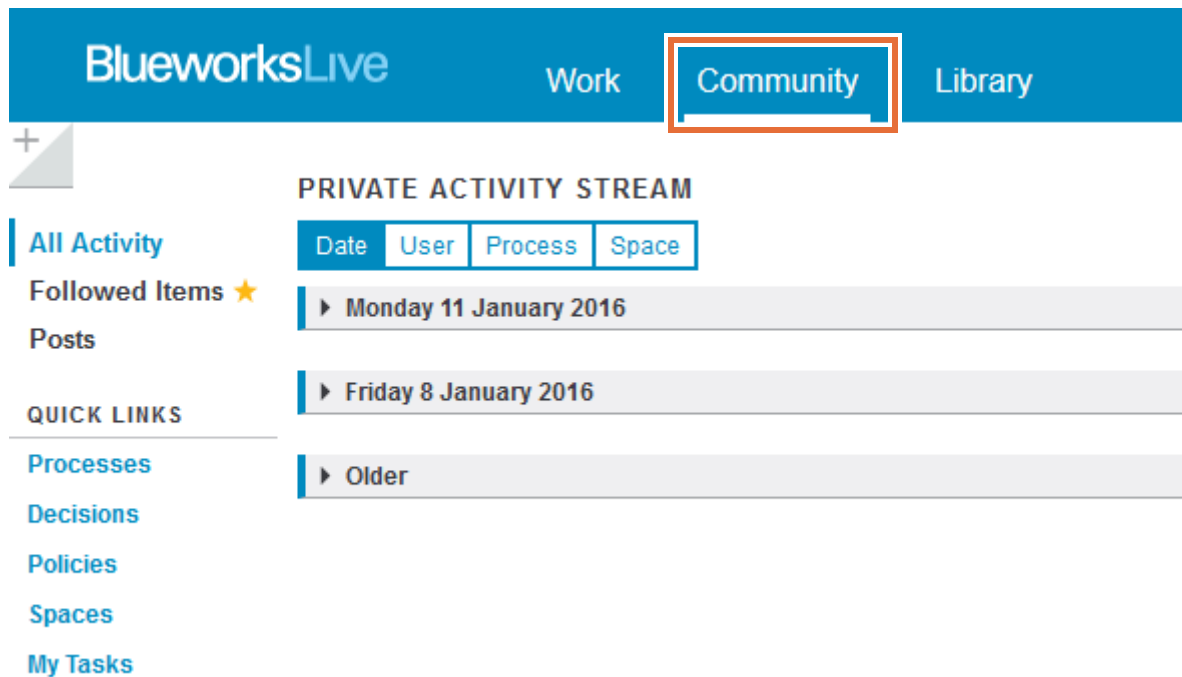
- \_\_\_ c. Enter the account email address, password, and click **Log In**.



The image shows the BlueworksLive login page. It has a blue header with the 'BlueworksLive' logo. Below the logo are two input fields: 'Email' with the placeholder 'user@mail.com' and 'Password' with a masked password '.....'. There is a checkbox labeled 'Remember my email' and a 'Log In' button, which is highlighted with a red rectangle. At the bottom, there are three links: 'New to Blueworks Live? Learn more', 'Trouble logging in? Find help here', and 'Don't have an account? Sign up now'. On the right side, there is a 'Latest news...' section with three news items: 'The December 2015 release', 'The February 2015 release', and 'The November 2014 release'. The footer includes the IBM logo and copyright information: 'Copyright © 2014 IBM Corporation. All Rights Reserved. Privacy | Security'.

- \_\_\_ 2. Access the Space.

- \_\_\_ a. Click **Community** at the top of the Blueworks Live interface.



The image shows the BlueworksLive Community interface. At the top is a blue navigation bar with the 'BlueworksLive' logo and three tabs: 'Work', 'Community' (highlighted with a red rectangle), and 'Library'. Below the navigation bar is a 'PRIVATE ACTIVITY STREAM' section. On the left, there is a sidebar with a '+ ' icon and a list of links: 'All Activity', 'Followed Items ★', 'Posts', 'QUICK LINKS', 'Processes', 'Decisions', 'Policies', 'Spaces', and 'My Tasks'. The main content area shows a list of activity items with columns for 'Date', 'User', 'Process', and 'Space'. The first item is dated 'Monday 11 January 2016', the second 'Friday 8 January 2016', and the third 'Older'.

\_\_\_ b. Click the **Spaces** link.

The screenshot shows the BlueworksLive interface. At the top is a blue header with the logo and navigation tabs: Work, Community, and Library. Below the header is a sidebar on the left with a '+' icon and a list of links: All Activity, Followed Items (with a star icon), Posts, QUICK LINKS, Processes, Decisions, Policies, **Spaces** (highlighted with a red box), and My Tasks. The main content area is titled 'PRIVATE ACTIVITY STREAM' and contains a table with columns: Date, User, Process, and Space. The table lists three items: 'Monday 11 January 2016', 'Friday 8 January 2016', and 'Older'.

\_\_\_ c. Click the star icon next to **Spaces** to list only the spaces you are following.

The screenshot shows the BlueworksLive interface with the 'Spaces' section selected. The top blue header contains the logo and navigation tabs: Work, Community, and Library. Below the header is a secondary navigation bar with tabs: Spaces (selected), Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Terms. Below this is a filter bar with a dropdown menu set to 'Active', the text 'Spaces (7)', a star icon (highlighted with a red box), a grid icon, and a list icon. To the right of the filter bar are tabs for 'Name', 'Date', and 'Tag'. The main content area displays four space cards: 'Blueworks Live Training' (with a star icon), 'Process Examples', 'Space 02', and 'Training Space' (with a star icon). Each card shows the last modified date by 'User 1'.

\_\_\_ d. Click **Training Space**.

The screenshot shows the BlueworksLive interface. At the top, there's a navigation bar with 'Work', 'Community', and 'Li' (likely 'Live'). Below this, there's a 'Spaces' section with a list of spaces. The 'Training Space' is highlighted with an orange box. It shows the space name, a star icon, and tags 'educarion' and 'training'.

\_\_\_ 3. Create a Process Blueprint.

\_\_\_ a. Click **Create New** on the right side of the page.

\_\_\_ b. Select **Process Blueprint** from the options.

The screenshot shows the 'Create New' dropdown menu in the BlueworksLive interface. The 'Process Blueprint' option is highlighted with an orange box. Other options visible include 'Space', 'Process App', 'Policy', and 'Decision'.

\_\_\_ c. Name the process: Training 01

- \_\_\_ d. Click **Create**.

## Blueprint a Process

Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain.

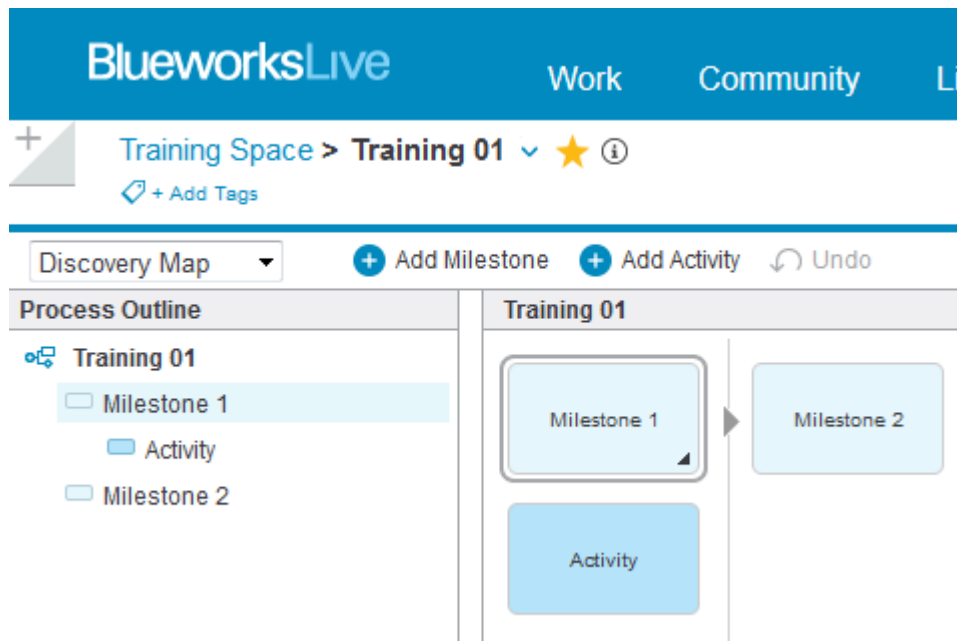
**Process Name**  
**Training 01**

By default, you will automatically follow all processes you create. You can change this in your user settings panel.

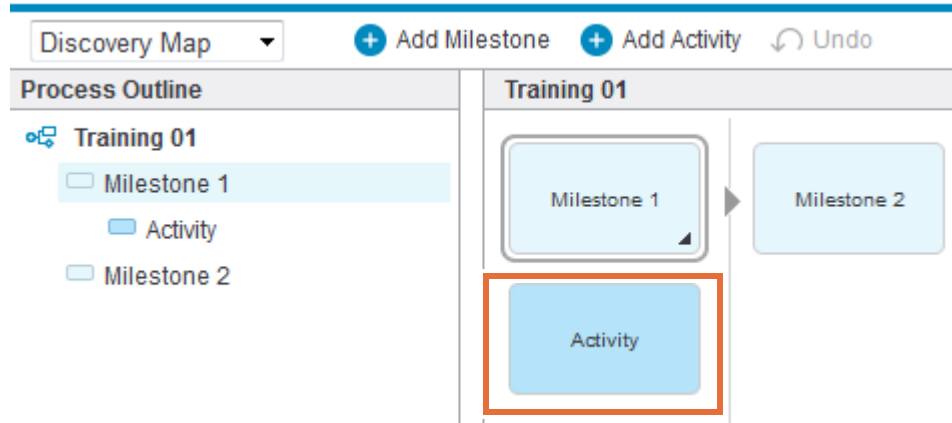
Select Create to start blueprinting your process.

**Create**

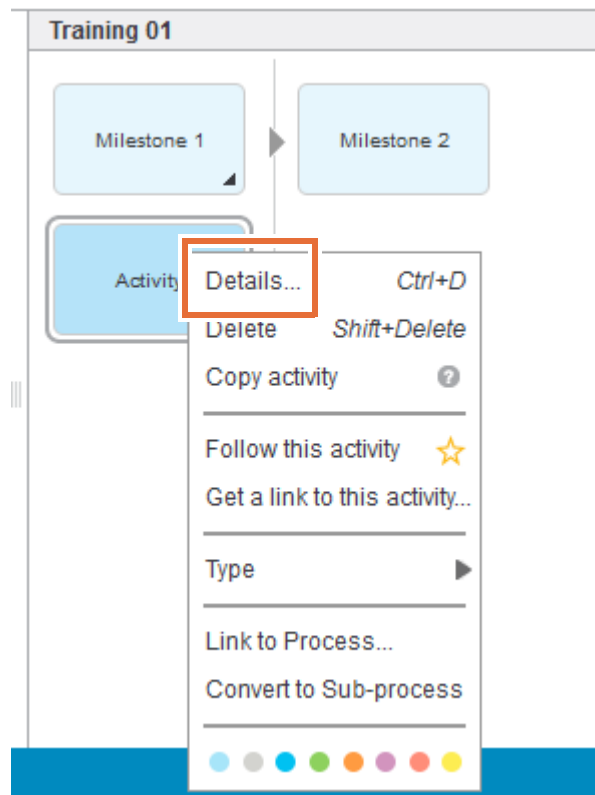
- \_\_\_ e. Verify that the **Discovery Map** for the process is created.



- \_\_\_ 4. Add a participant to the process.
- \_\_\_ a. Right-click the blue **Activity** box.



- \_\_\_ b. Select **Details** from the options.



\_\_\_ c. In the **Participant** field, type: Training Participant

\_\_\_ d. Click **X** to close the **Activity** dialog box.

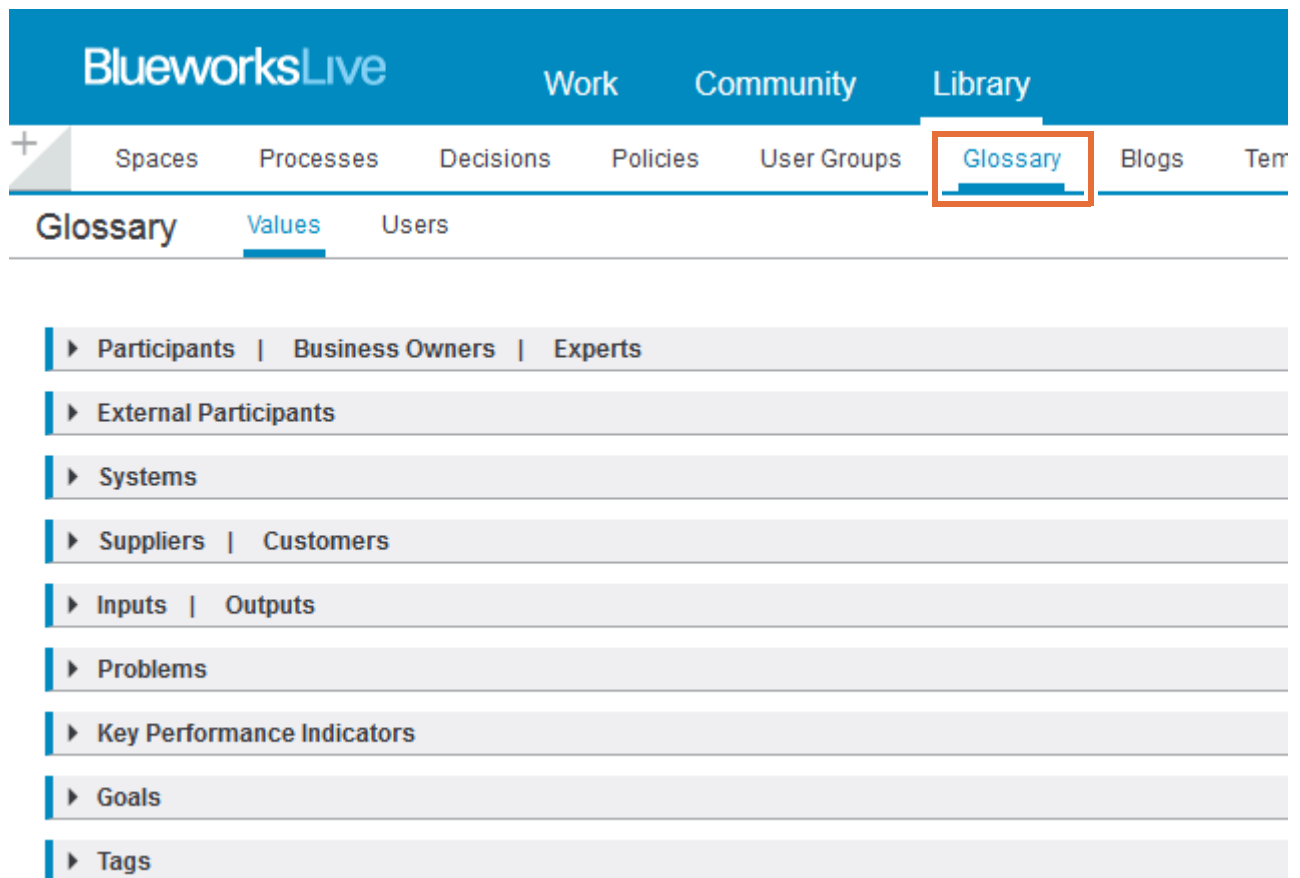
## Part 2: Modify the glossary

\_\_\_ 1. Access the glossary section of the account.

\_\_\_ a. Click **Library** at the top of the Blueworks Live interface.



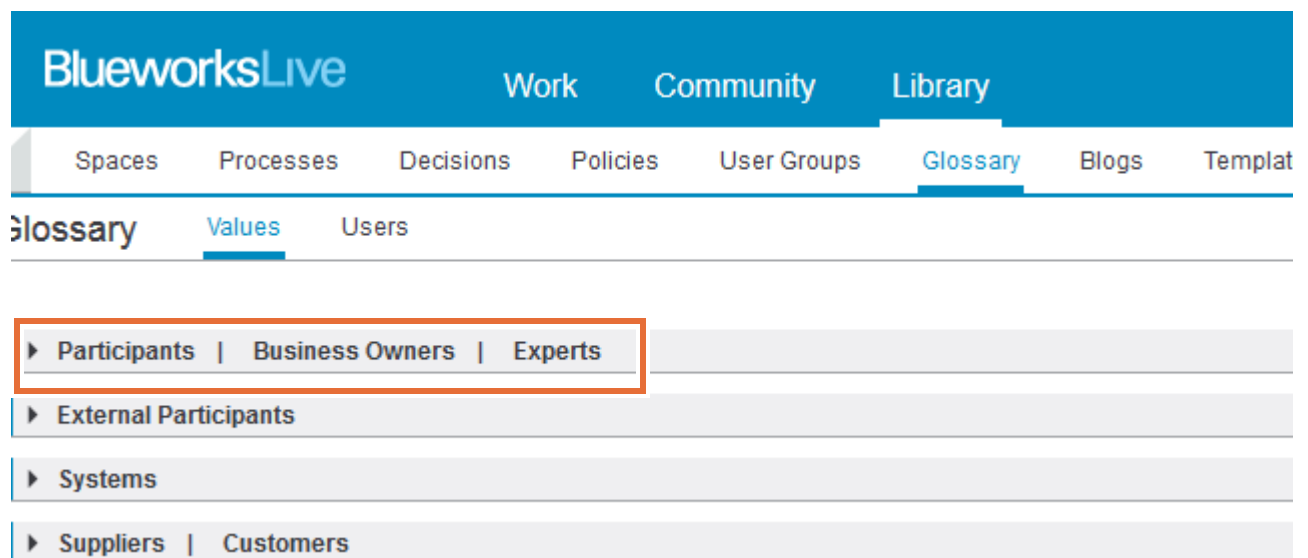
\_\_\_ b. Click the **Glossary** tab.



The screenshot shows the BlueworksLive interface. The top navigation bar includes 'Work', 'Community', and 'Library'. The 'Library' tab is active, and the 'Glossary' sub-tab is highlighted with an orange box. Below the navigation bar, the 'Glossary' section is visible, with 'Values' and 'Users' as sub-sections. A list of glossary entries is displayed, including 'Participants', 'Business Owners', 'Experts', 'External Participants', 'Systems', 'Suppliers', 'Customers', 'Inputs', 'Outputs', 'Problems', 'Key Performance Indicators', 'Goals', and 'Tags'.

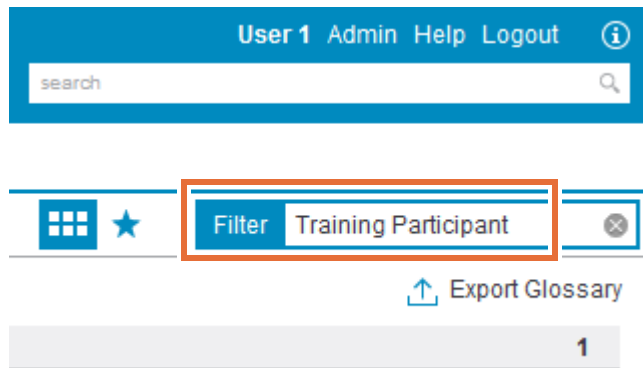
\_\_\_ 2. Find the new glossary entry.

\_\_\_ a. Expand the **Participants** category.

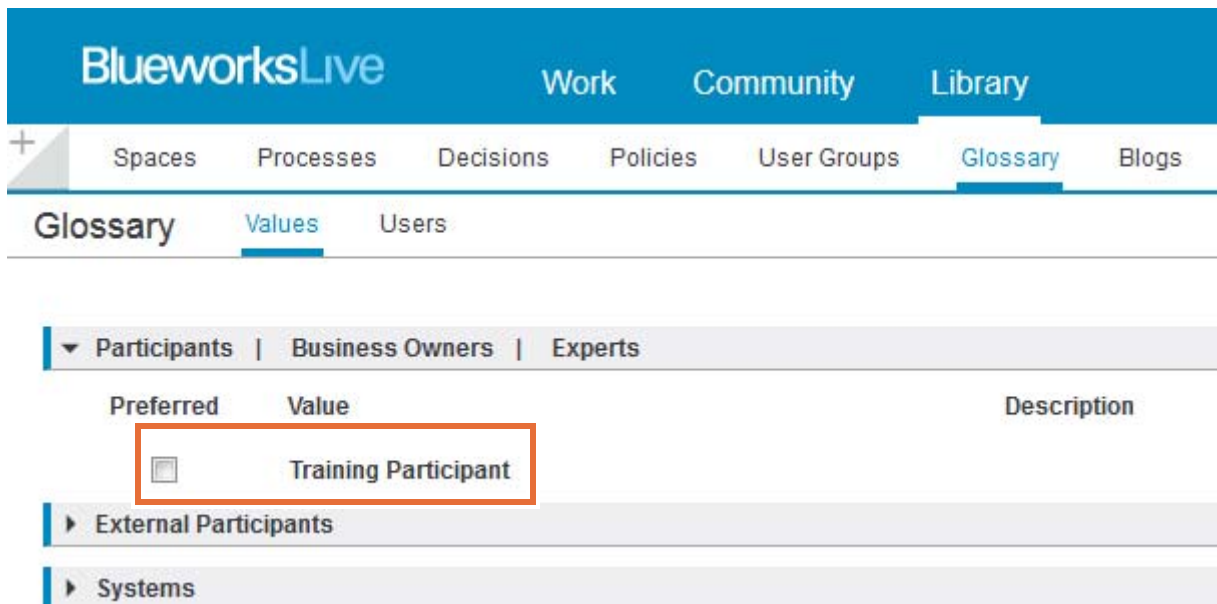


The screenshot shows the BlueworksLive interface. The top navigation bar includes 'Work', 'Community', and 'Library'. The 'Library' tab is active, and the 'Glossary' sub-tab is highlighted with an orange box. Below the navigation bar, the 'Glossary' section is visible, with 'Values' and 'Users' as sub-sections. A list of glossary entries is displayed, including 'Participants', 'Business Owners', 'Experts', 'External Participants', 'Systems', 'Suppliers', and 'Customers'. The 'Participants' category is expanded, showing a sub-list of 'Business Owners' and 'Experts'.

- \_\_\_ b. In the **Filter** field, enter **Training Participant** to find the new entry.

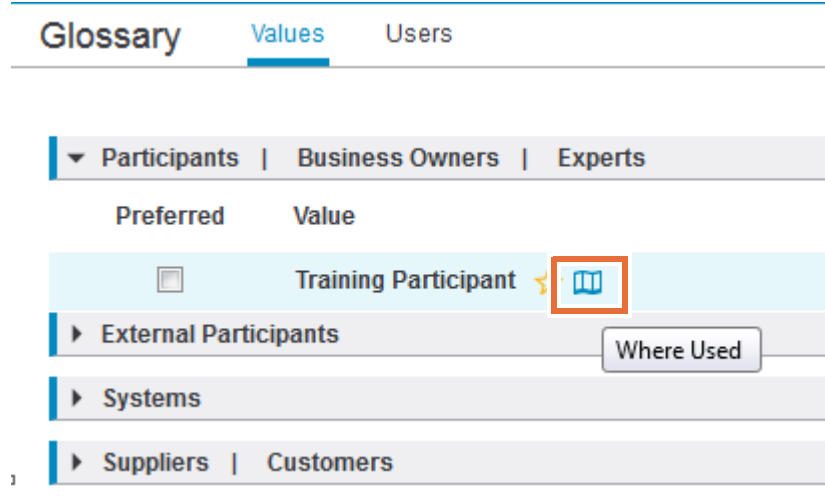


- \_\_\_ c. The new entry is displayed under the **Participants** category.



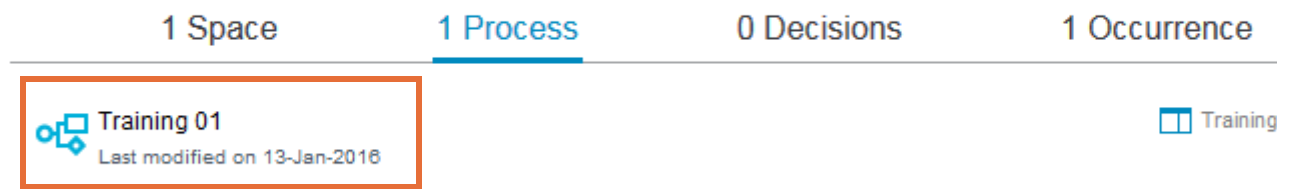
- \_\_\_ 3. Verify the **Where Used** value of the glossary item.
- \_\_\_ a. Hover the cursor over the **Training Participant** entry.

- \_\_\_ b. Click the **Where Used** icon to see where the entry is used in the account.

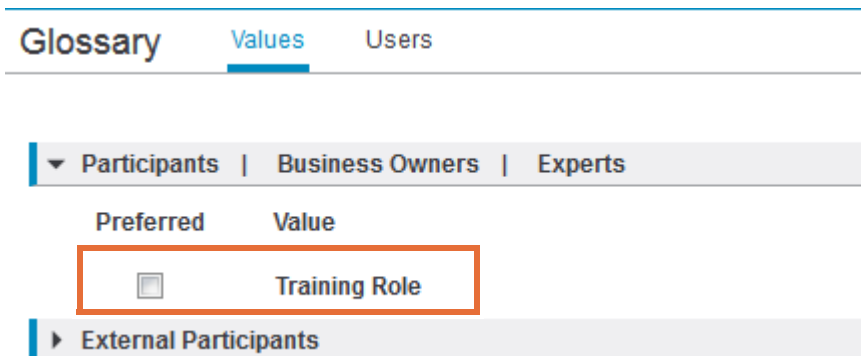


- \_\_\_ c. Verify that it is used only in the *Training 01* process in the **Training Space**.

## Where Used: Training Participant

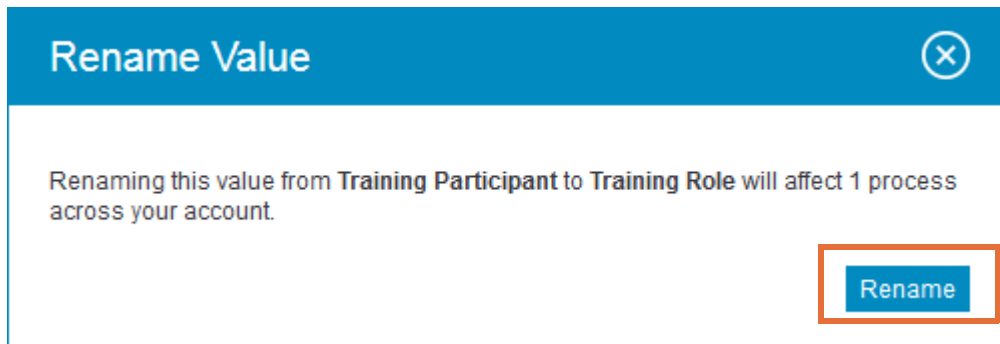


- \_\_\_ d. Click **X** to close the Where Used dialog box.
- \_\_\_ 4. Modify the glossary item.
- \_\_\_ a. Click the **Training Participant** name.
- \_\_\_ b. Enter a new value for the name: Training Role

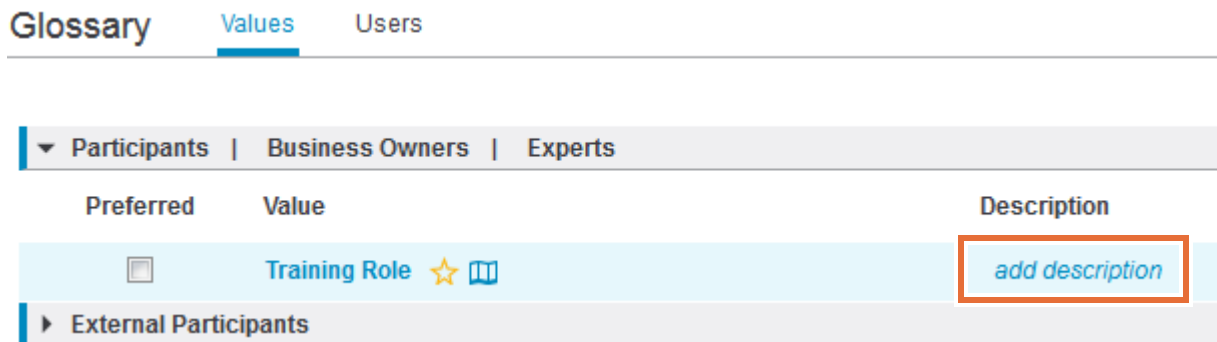


- \_\_\_ c. Press Enter to complete the change.

- \_\_\_ d. Click **Rename** for the confirmation message window.

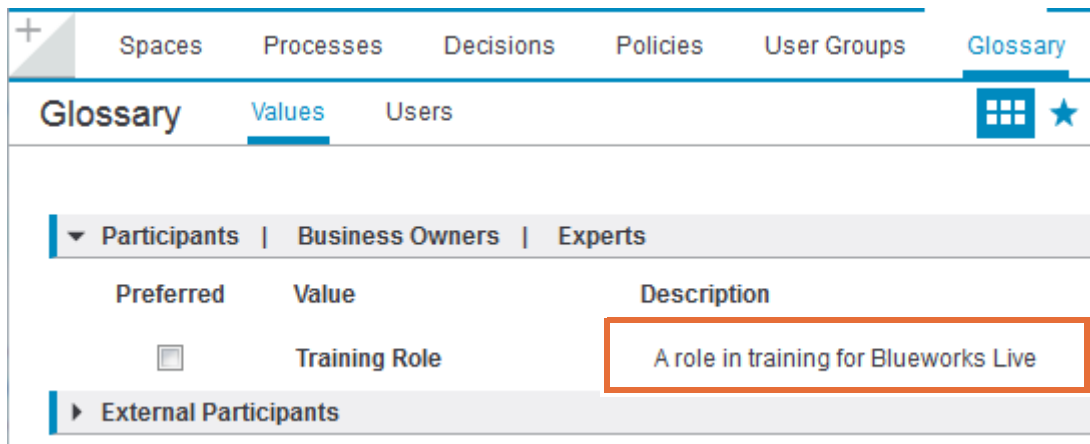


- \_\_\_ e. Hover over **Training Role** and click the **add description** link.

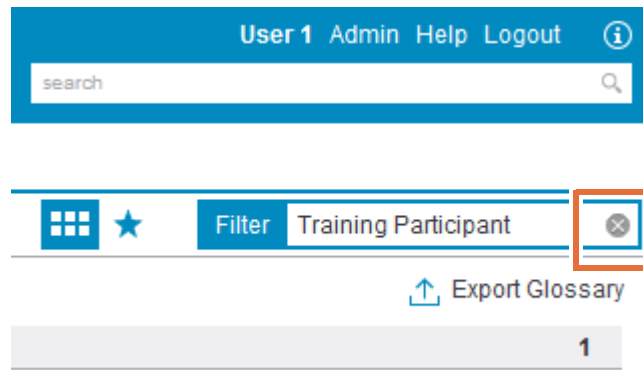


- \_\_\_ f. Enter the description: A role in training for Blueworks Live

- \_\_\_ g. Press Enter to complete the change.

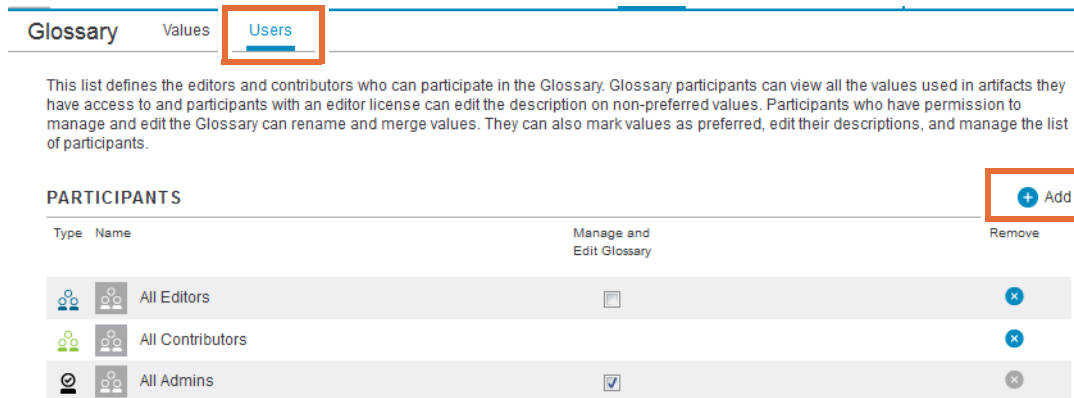


- \_\_\_ h. Click the **X** next to the *Training Participant* name in the **Filter** to clear the entry.

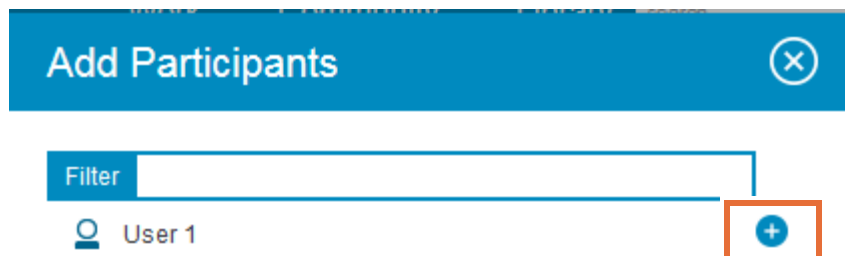


### Part 3: Edit the glossary user permissions

- \_\_\_ 1. Add users to the glossary management.
- \_\_\_ a. Click **Users** at the top of the glossary page.
- \_\_\_ b. Click **+ Add** to add users to manage the glossary.







- \_\_\_ c. Click the **+** plus icon next to the name to select the participant from the list provided.











- \_\_\_ d. Click **X** to close the dialog box.

- \_\_\_ 2. Grant permissions to the users.
- \_\_\_ a. Verify that the check box for the user you added is selected to allow the user to edit and manage the glossary.

### PARTICIPANTS

Type	Name	Manage and Edit Glossary
	User 1	<input checked="" type="checkbox"/>
	All Editors	<input type="checkbox"/>
	All Contributors	
	All Admins	<input checked="" type="checkbox"/>

- \_\_\_ b. Click **X** next to the **All Contributors** name to remove it from the list of users.

PARTICIPANTS		+ Add	
Type	Name	Manage and Edit Glossary	Remove
	User 1	<input checked="" type="checkbox"/>	
	All Editors	<input type="checkbox"/>	
	All Contributors		
	All Admins	<input checked="" type="checkbox"/>	



## Note

Clear the check box for the new user to revert to the previous setting. Now click the **X** to the right of the newly added user to remove that from the table. Click **Add** to access the list of users. Click **All Contributors** to add it back to the table. Your account setting for the glossary is now back to the default preference.

The screenshot shows the BlueworksLive interface. The top navigation bar includes 'User 1 Admin Help Logout' and a search bar. The main navigation menu has 'Spaces', 'Processes', 'Decisions', 'Policies', 'User Groups', 'Glossary', 'Blogs', and 'Templates'. The 'Glossary' section is active, with sub-tabs for 'Values' and 'Users'. The 'Users' tab is selected, displaying a list of participants. A descriptive text block explains the roles of editors and contributors. Below this, a table lists the participants: 'All Editors', 'All Contributors', and 'All Admins'. Each row has a 'Manage and Edit Glossary' checkbox and a 'Remove' button (marked with an 'X').

This list defines the editors and contributors who can participate in the Glossary. Glossary participants can view all the values used in artifacts they have access to and participants with an editor license can edit the description on non-preferred values. Participants who have permission to manage and edit the Glossary can rename and merge values. They can also mark values as preferred, edit their descriptions, and manage the list of participants.

**PARTICIPANTS** + Add

Type	Name	Manage and Edit Glossary	Remove
	All Editors	<input type="checkbox"/>	
	All Contributors	<input type="checkbox"/>	
	All Admins	<input checked="" type="checkbox"/>	

## End of exercise

## Exercise review and wrap-up

In this exercise, a participant is added to a newly created Blueprint process. The same participant is modified in the glossary. The glossary user list is modified to add users with permission to manage the glossary.



# Exercise 4. Deleting an attachment in a project

## What this exercise is about

In this exercise, you learn how to manage files in a Blueworks Live account.

## What you should be able to do

After completing this exercise, you should be able to:

- Delete a file that is attached to a Blueworks Live space

## Introduction

File attachments are common in process models in Blueworks Live. After time, the file space allotment for Blueworks Live is at the maximum level. Administrators are tasked with the management of file attachments, including deletion through the **File Management** section.

## Requirements

This exercise requires the Blueworks Live account permissions to complete the tasks.

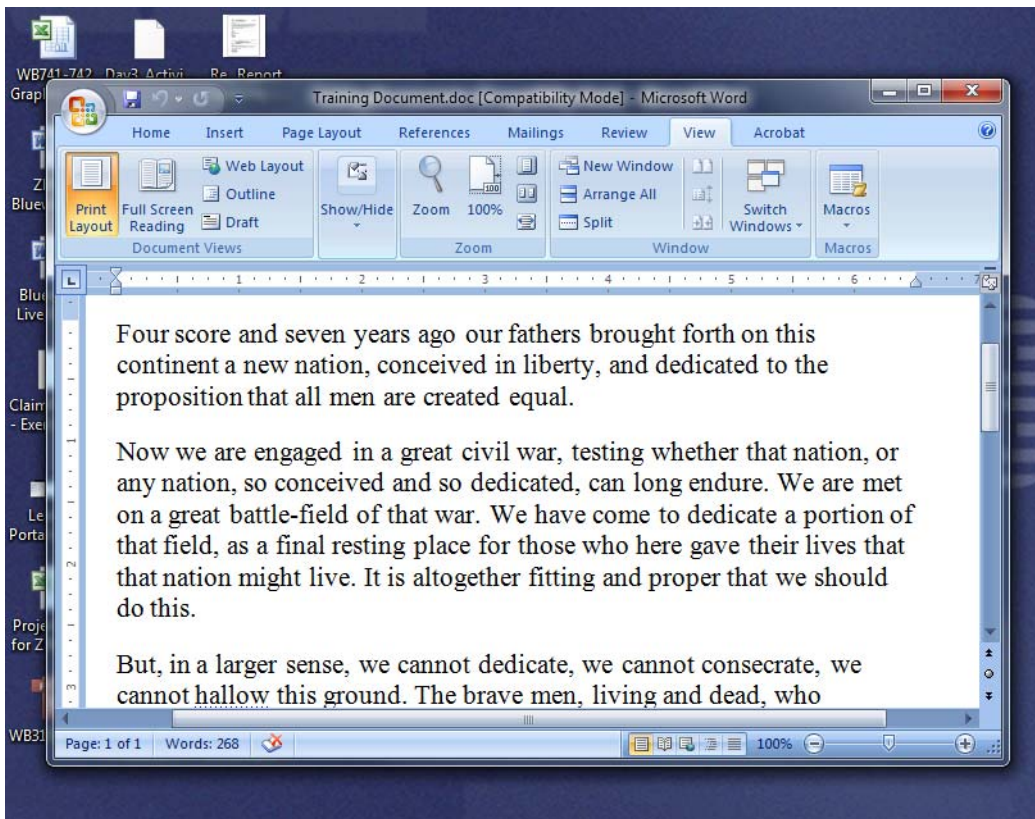
## Exercise instructions

### Preface

This exercise depends on a Blueworks Live account administrator access.

### Part 1: Attach a file to a process

- \_\_\_ 1. Create a document
  - \_\_\_ a. Create a document file with Microsoft Word or any other preferred document application.
  - \_\_\_ b. Add sample text to the document. The content does not matter.
  - \_\_\_ c. Save the file to your desktop and use the following title: Training Document



#### Note

If you are already logged on to Blueworks Live from the previous exercise, skip step 2 in the exercise and proceed to step 3.

- \_\_\_ 2. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
<https://www.blueworkslive.com/>

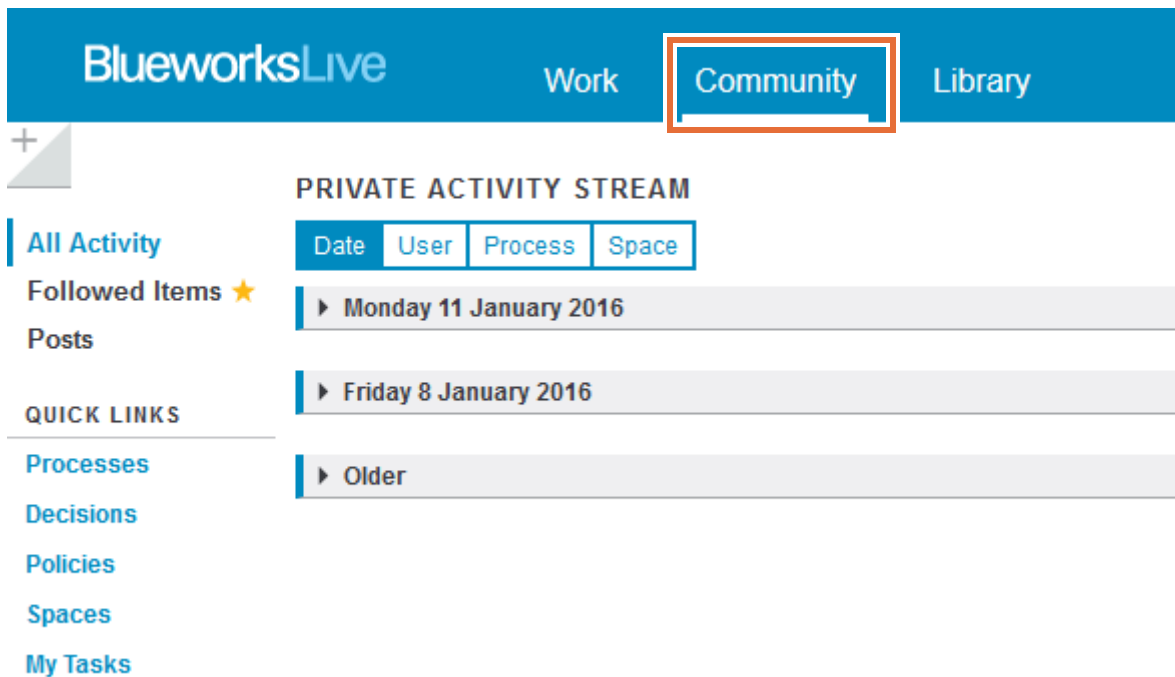
\_\_\_ b. Click **Log In** on the upper-right corner of the window.



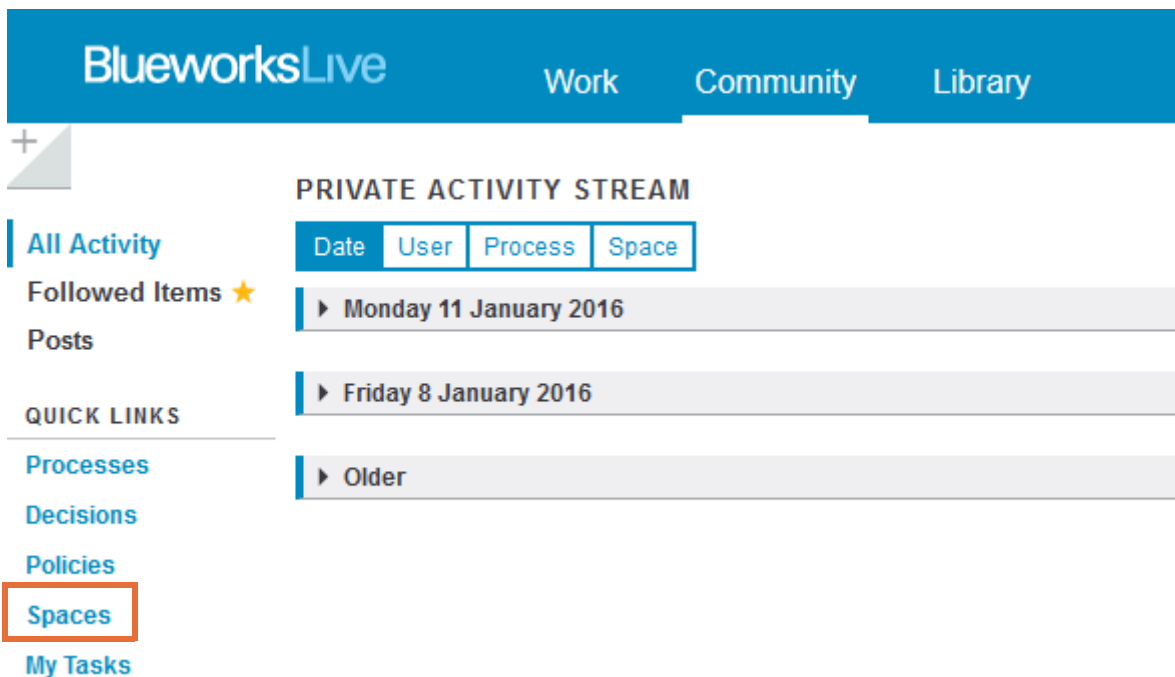
\_\_\_ c. Enter the account email address, password, and click **Log In**.

\_\_\_ 3. Access the Space.

\_\_\_ a. Click **Community** at the top of the Blueworks Live interface.



\_\_\_ b. Click the **Spaces** link.



- \_\_\_ c. Click the star icon to list only the spaces you are following.

BlueworksLive Work Community Library

+ Spaces Processes Decisions Policies User Groups Glossary Blogs Tern

Active Spaces (7) ★ [Grid Icon] [List Icon]

Name	Date	Tag
Blueworks Live Training	Last modified by User 1 on 24-Dec-2015	
Process Examples	Last modified by User 1 on 24-Dec-2015	
Space 02	Last modified by User 1 on 08-Jan-2016	
Training Space	Last modified by User 1 on 11-Jan-2016	education training

- \_\_\_ d. Click **Training Space**..

BlueworksLive Work Community Library User 1

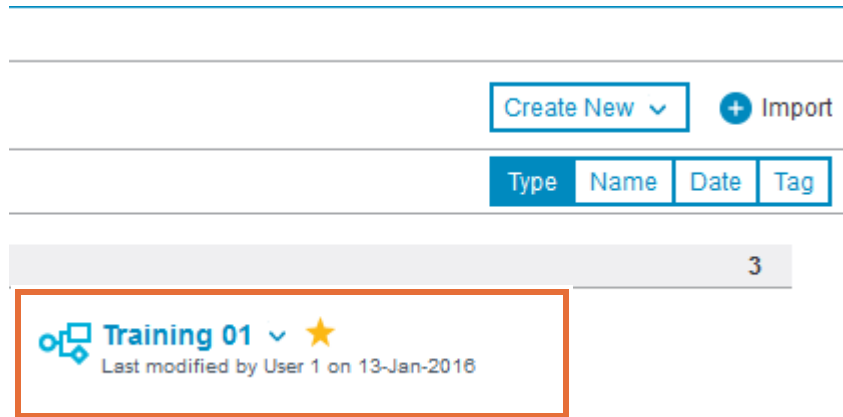
+ Spaces Processes Decisions Policies User Groups Glossary Blogs

Templates

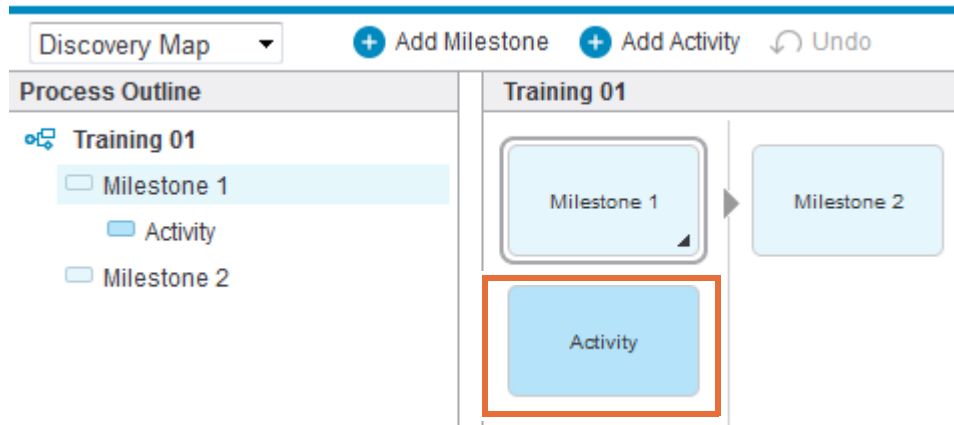
Active Spaces (3) ★ [Grid Icon] [List Icon] Name Date Tag Filter

Blueworks Live Training	Last modified by User 1 on 24-Dec-2015	
Training Space	Last modified by User 1 on 29-Dec-2015	education training

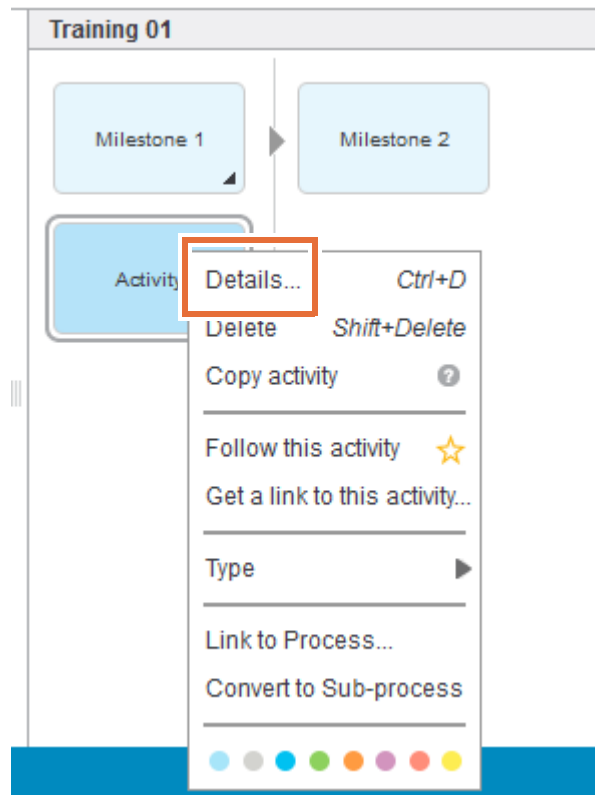
- \_\_\_ 4. Access the process and attach a file.
- \_\_\_ a. Click the **Training 01** process in the right side of the space page.



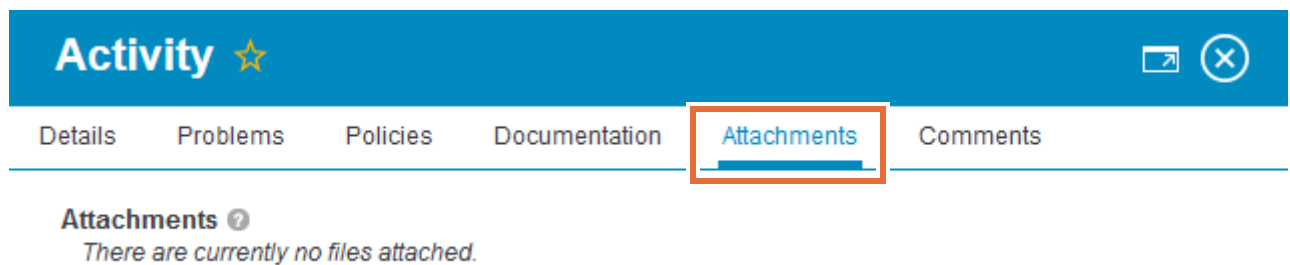
- \_\_\_ b. Right-click the blue **Activity** box.



\_\_\_ c. Select **Details** from the options.





\_\_\_ d. Click the **Attachments** tab in the Activity dialog box.




\_\_\_ e. Click **Add**.

**Activity** 

[Details](#) [Problems](#) [Policies](#) [Documentation](#) [Attachments](#) [Comments](#)

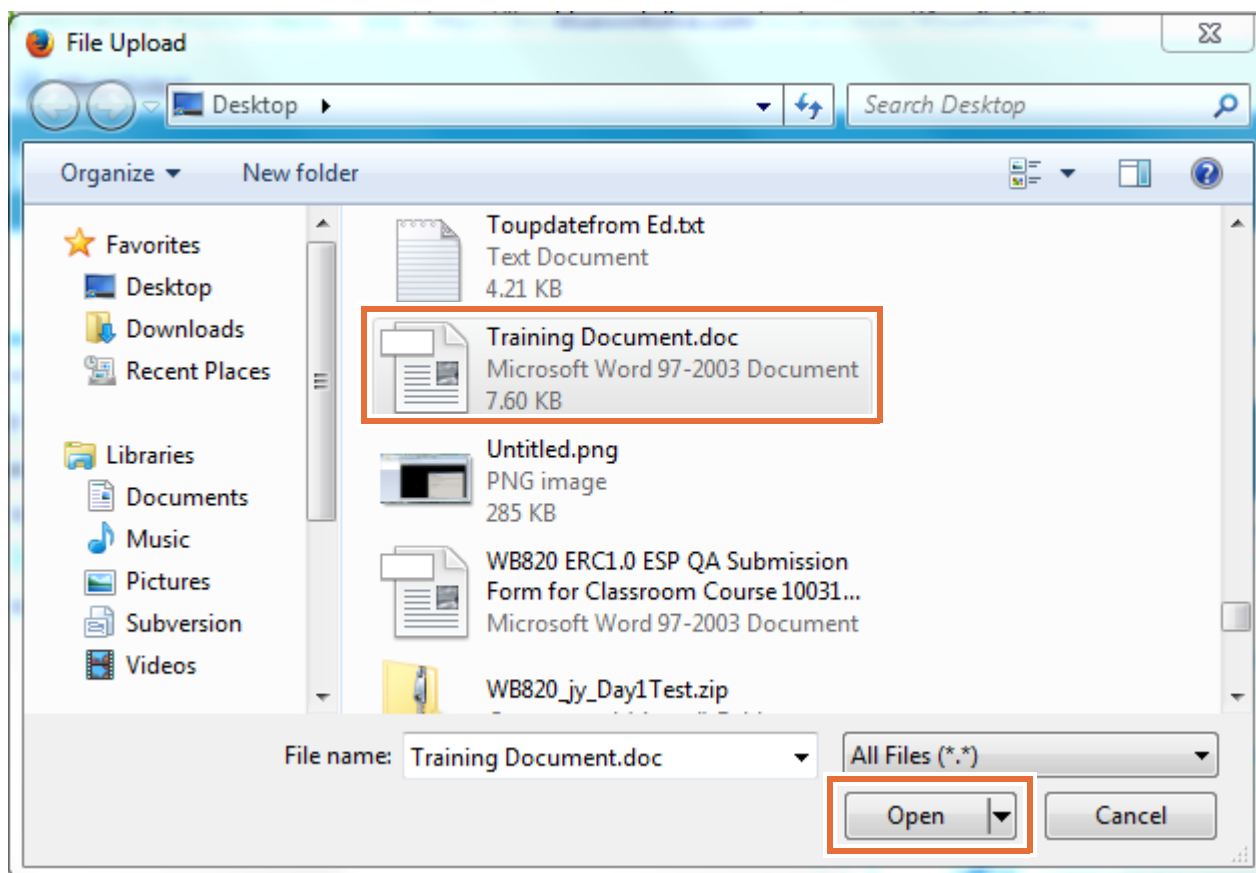
**Attachments**   
*There are currently no files attached.*



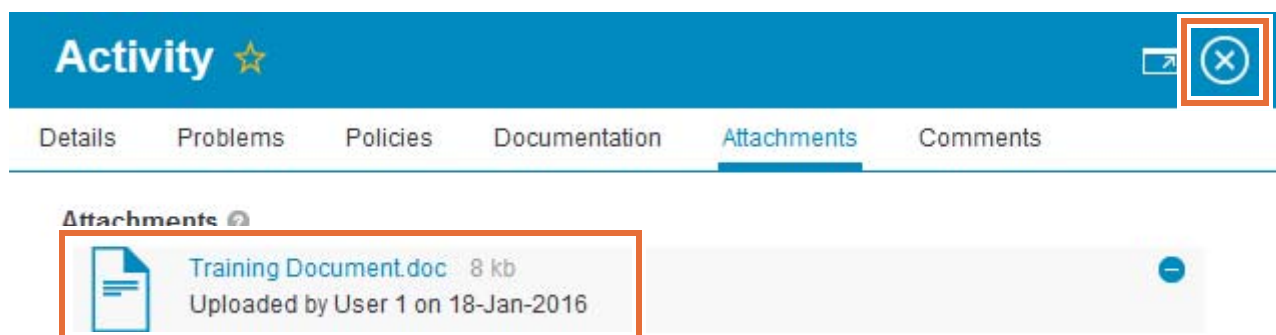
\_\_\_ f. Select the document **Training Document.doc** from your desktop.



- \_\_\_ g. Click **Open** to attach the document to the activity.



- \_\_\_ h. Verify that the document is added to the process.



- \_\_\_ i. Click **X** to close the dialog box.

## Part 2: Delete the file from the account

- \_\_\_ 1. Access the **File Management** section of the account.
- \_\_\_ a. Click the **Admin** link at the top of the Blueworks Live interface.

- \_\_\_ b. Click the **File Management** tab on the Admin page.

BlueworksLive

User Management **File Management** Properties Account Information Billing Details Customization Security

**File Attachments**  
Your account is currently using 0 kb of the 2048 mb space available.

File	Name	File Size	Type	Location	Date Uploaded	Uploaded By
	Training Document.doc	0 kb		Training 01	14-Jan-2016	User 1

- \_\_\_ c. Select the check box next to the **Training Document** that is attached to the *Training 01* process.
- \_\_\_ d. Click **Delete**.

BlueworksLive

User Management **File Management** Properties Account Information Billing Details Customization Security

**File Attachments**  
Your account is currently using 0 kb of the 2048 mb space available.

File	Name	File Size	Type	Location	Date Uploaded	Uploaded By	
	Training Document.doc	8 kb		Training 01	14-Jan-2016	User 1	<input checked="" type="checkbox"/>

**Delete**

- \_\_\_ e. Click **Delete** to confirm the deletion of the file.

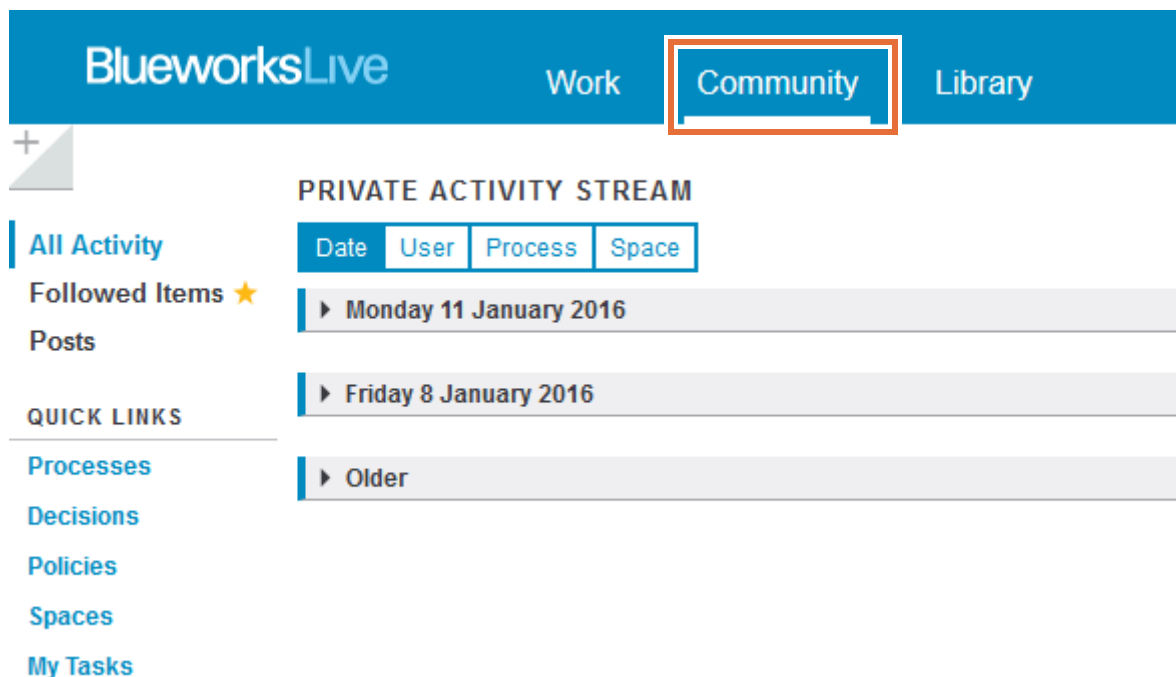
**Confirm File Delete**

Are you sure you want to permanently delete this file?  
Deleted file attachments are immediately removed from your account and can not be undone or restored.

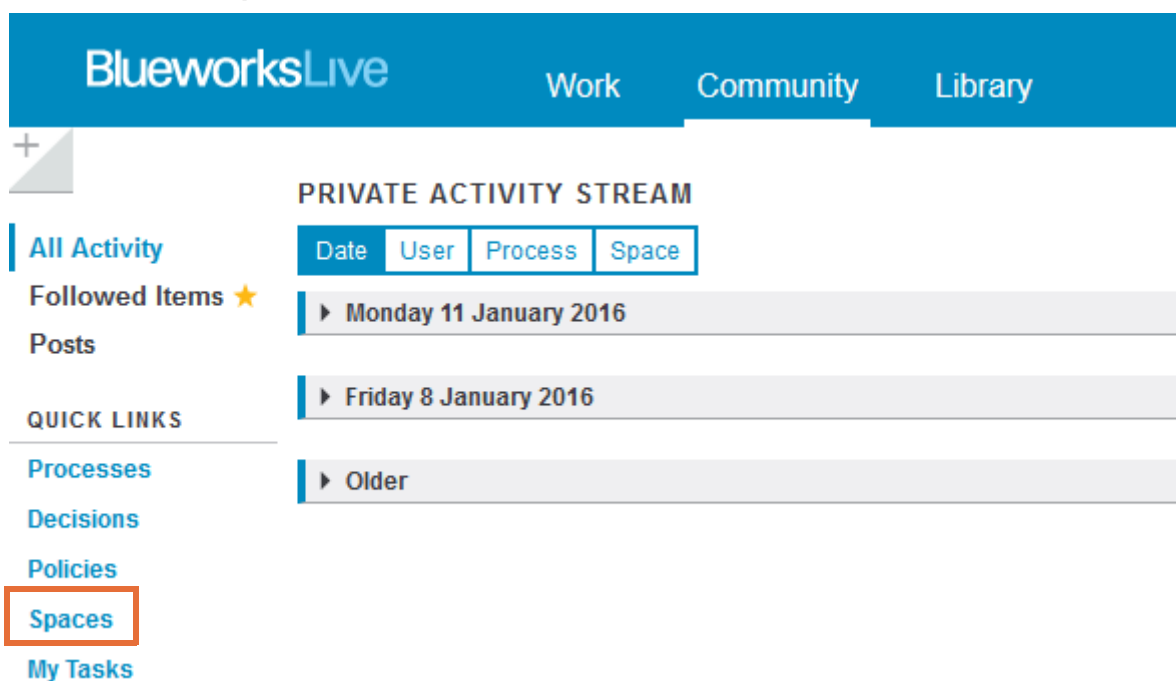
**Delete**

\_\_\_ 2. Verify the file deletion.

\_\_\_ a. Click **Community** at the top of the Blueworks Live interface.



\_\_\_ b. Click the **Spaces** link.



- \_\_\_ c. Click the star icon to list only the spaces you are following.

BlueworksLive Work Community Library

+ Spaces Processes Decisions Policies User Groups Glossary Blogs Ter

Active Spaces (7) ★ [Grid Icon] [List Icon] Name Date Tag

Blueworks Live Training ▾ ★  
Last modified by User 1 on 24-Dec-2015

Process Examples ▾  
Last modified by User 1 on 24-Dec-2015

Space 02 ▾  
Last modified by User 1 on 08-Jan-2016

Training Space ▾ ★  
Last modified by User 1 on 11-Jan-2016  
education training

- \_\_\_ d. Click **Training Space**.

BlueworksLive Work Community Li search spaces User 1

+ Spaces Processes Decisions Policies User Groups Glossary Blogs

Templates

Active Spaces (3) ★ [Grid Icon] [List Icon] Name Date Tag Filter

Blueworks Live Training ▾ ★  
Last modified by User 1 on 24-Dec-2015

Training Space ▾ ★  
Last modified by User 1 on 29-Dec-2015  
education training

- \_\_\_ a. Click the **Training 01** process in the right side of the space page.

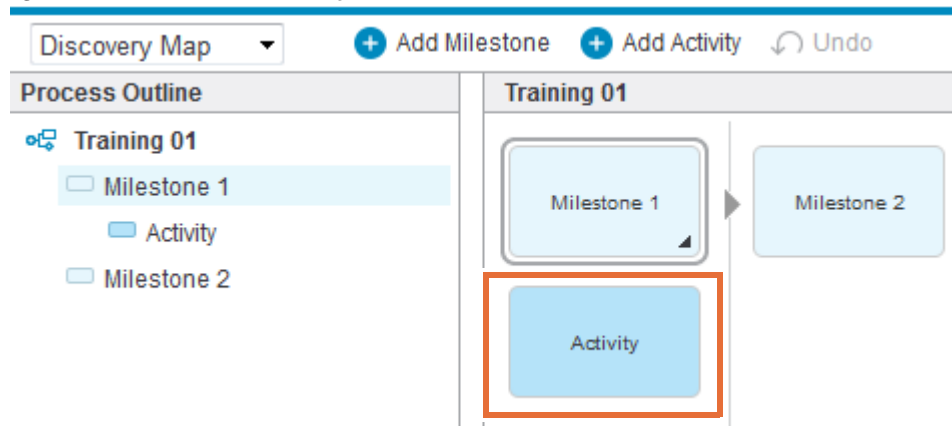
Create New ▾ + Import

Type Name Date Tag

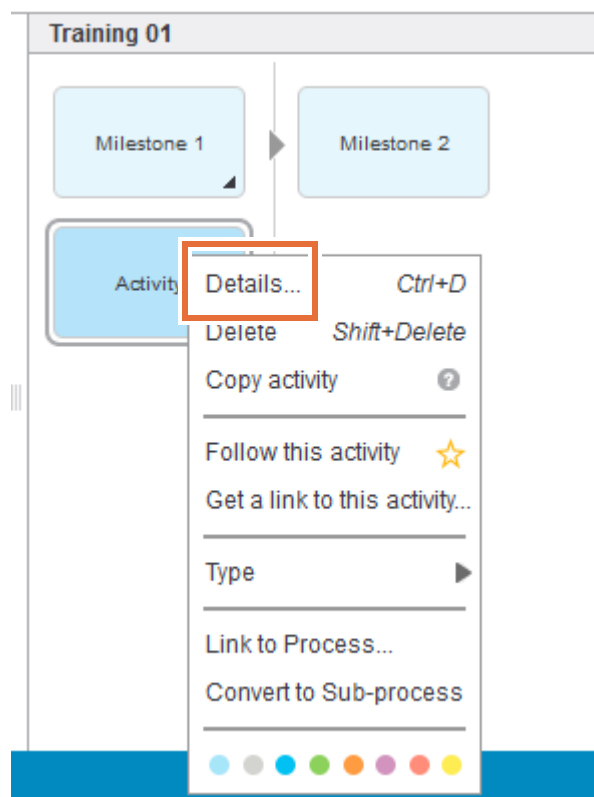
3

Training 01 ▾ ★  
Last modified by User 1 on 13-Jan-2016

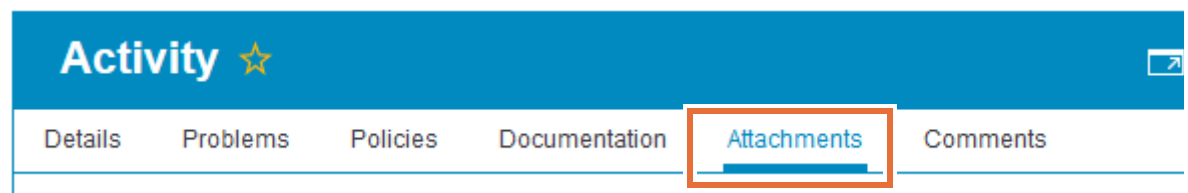
- \_\_\_ b. Right-click the blue **Activity** box.



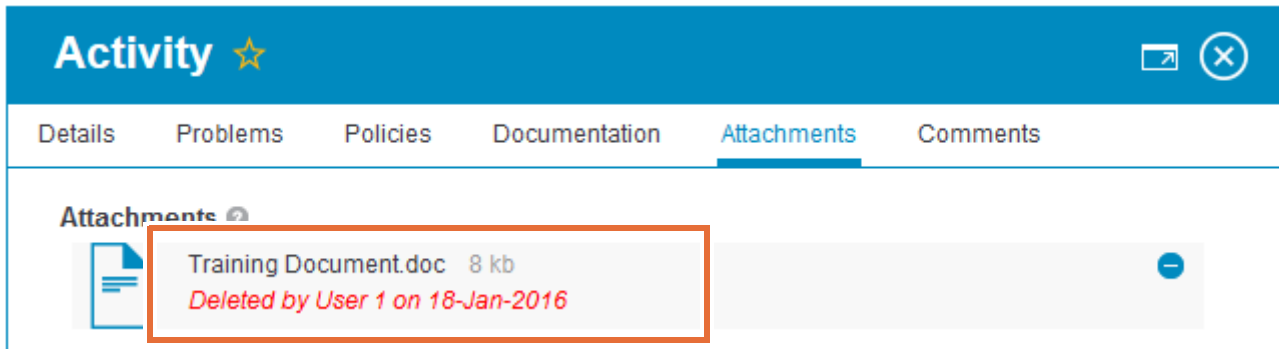
- \_\_\_ c. Select **Details** from the options.



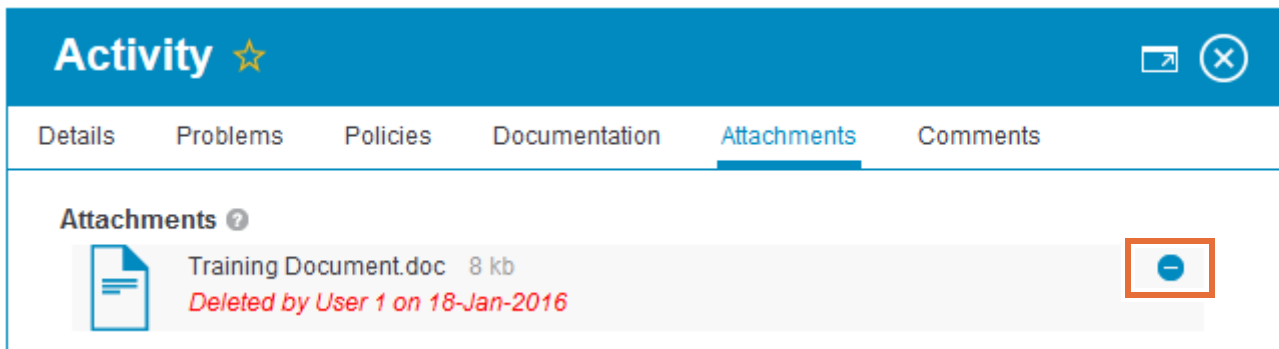
- \_\_\_ d. Click the **Attachments** tab in the Activity dialog box.



- \_\_\_ e. Verify that the file is marked as *Deleted by <user name>*.



- \_\_\_ f. Click the - minus icon to remove it from the attachments.



- \_\_\_ g. Click X to close the dialog box.

## End of exercise

## Exercise review and wrap-up

In this exercise, a document is created and attached to the process Training 01. The file is viewed in the File Management section of the Blueworks Live account. The file is deleted from the list of attached files.





# Exercise 5. Capturing a policy in a Blueworks Live blueprint

## What this exercise is about

In this exercise, you establish a policy for a Blueworks Live account and capture the policy in a Blueworks Live blueprint.

## What you should be able to do

After completing this exercise, you should be able to:

- Capture a policy in a Blueworks Live blueprint

## Introduction

Organizational policies govern business processes. To capture the business process details in a Blueworks Live blueprint process, account managers must capture the policies. Blueworks Live allows account managers to create business policy containers and add policies to blueprint processes.

## Requirements

This exercise requires the Blueworks Live account permissions to complete the tasks.

## Exercise instructions

### Preface

This exercise depends on a Blueworks Live account access.

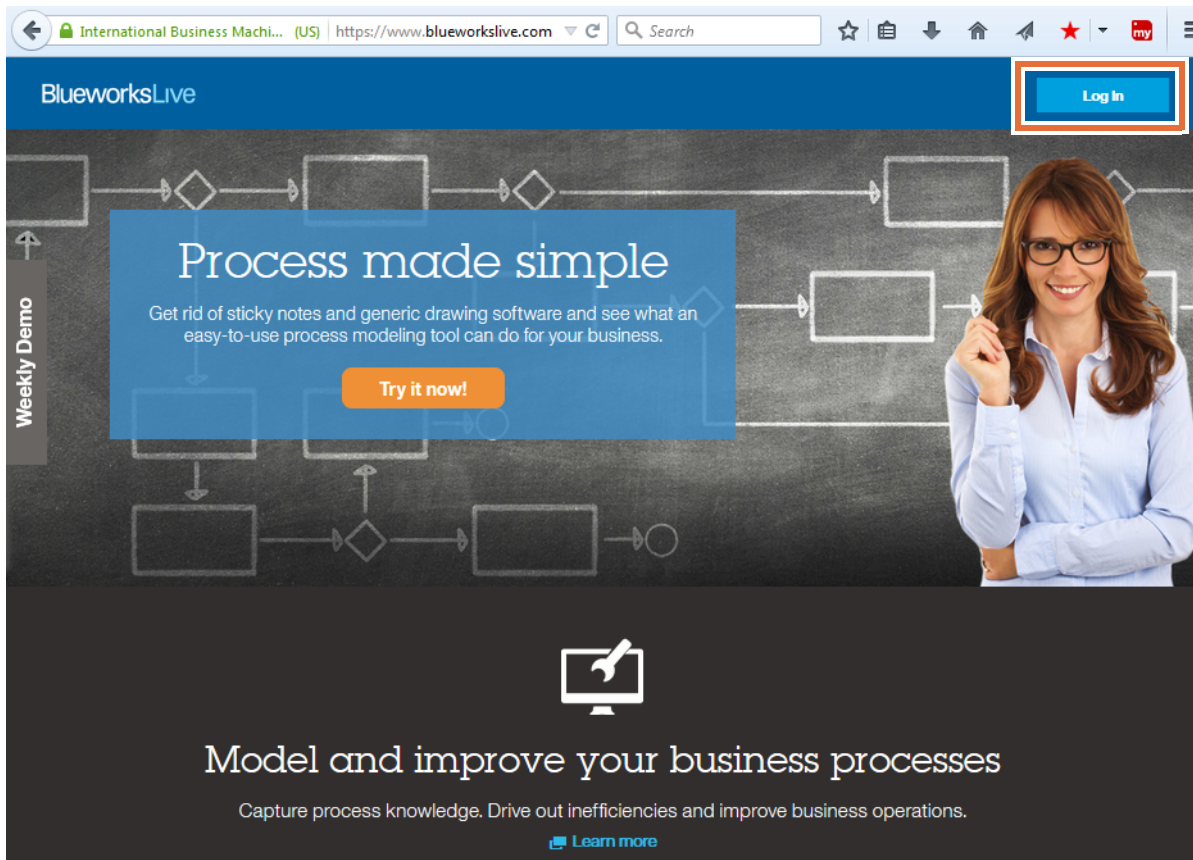
### Part 1: Capture a policy in Blueworks Live



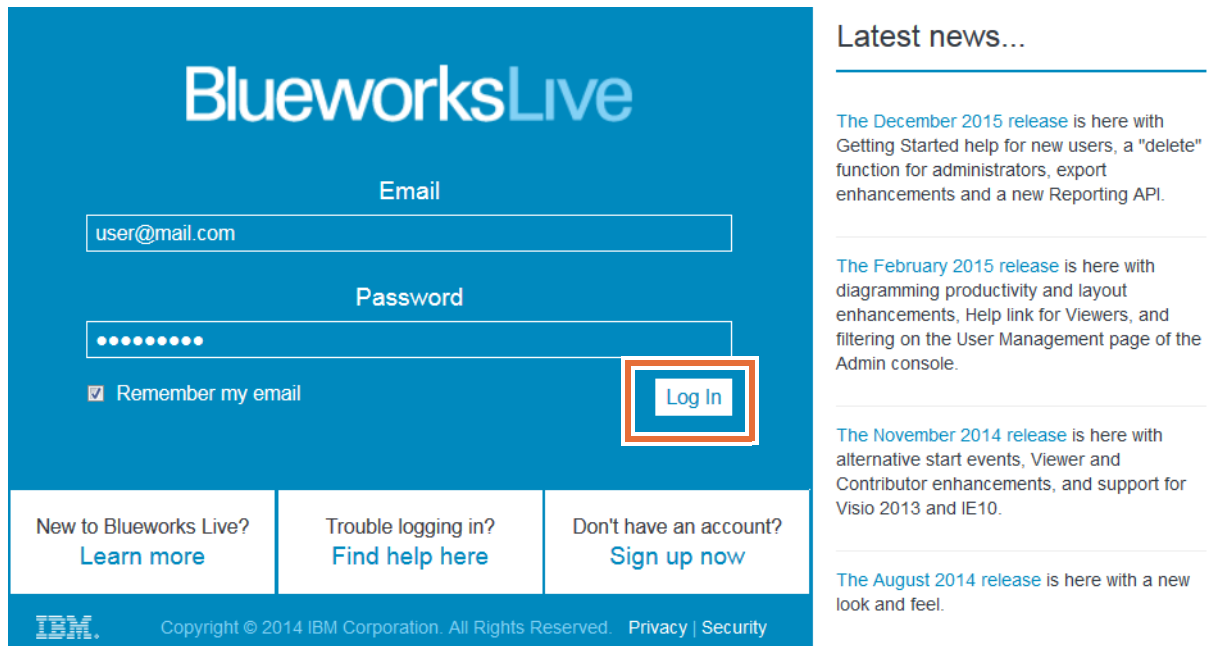
#### Note

If you are already logged on to Blueworks Live from the previous exercise, skip step 1 in the exercise and proceed to step 2.

- \_\_\_ 1. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
`https://www.blueworkslive.com/`
  - \_\_\_ b. Click **Log In** on the upper-right corner of the window.

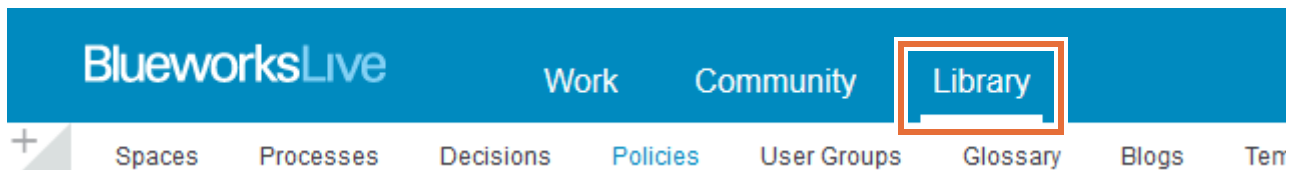


- \_\_\_ c. Enter the account email address, password, and click **Log In**.

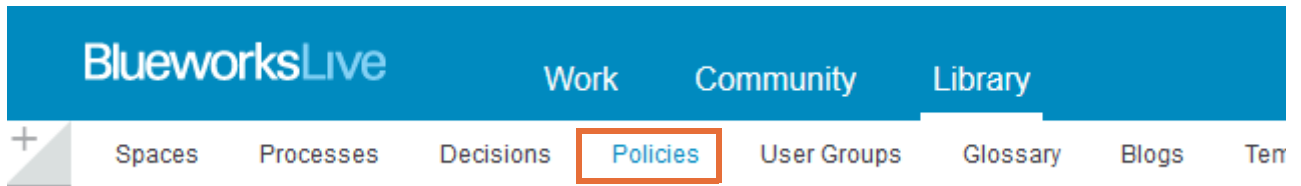


The login page for BlueworksLive features a blue header with the logo. Below it are input fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). A 'Remember my email' checkbox is checked. A red box highlights the 'Log In' button. To the right, under 'Latest news...', there are three news items: 'The December 2015 release', 'The February 2015 release', and 'The November 2014 release'. At the bottom, there are links for 'New to Blueworks Live?', 'Trouble logging in?', and 'Don't have an account?'. The footer includes the IBM logo and copyright information.

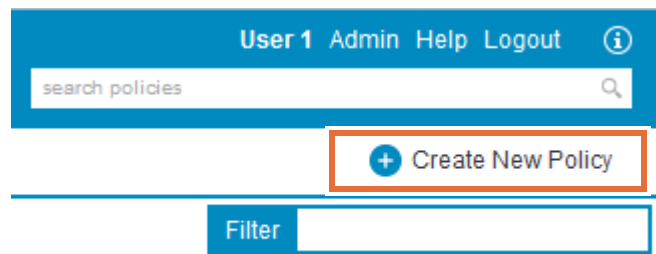
- \_\_\_ 2. Access the Policies section in Blueworks Live.
- \_\_\_ a. Click **Library** at the top of the Blueworks Live interface.



- \_\_\_ b. Click the **Policies** tab.

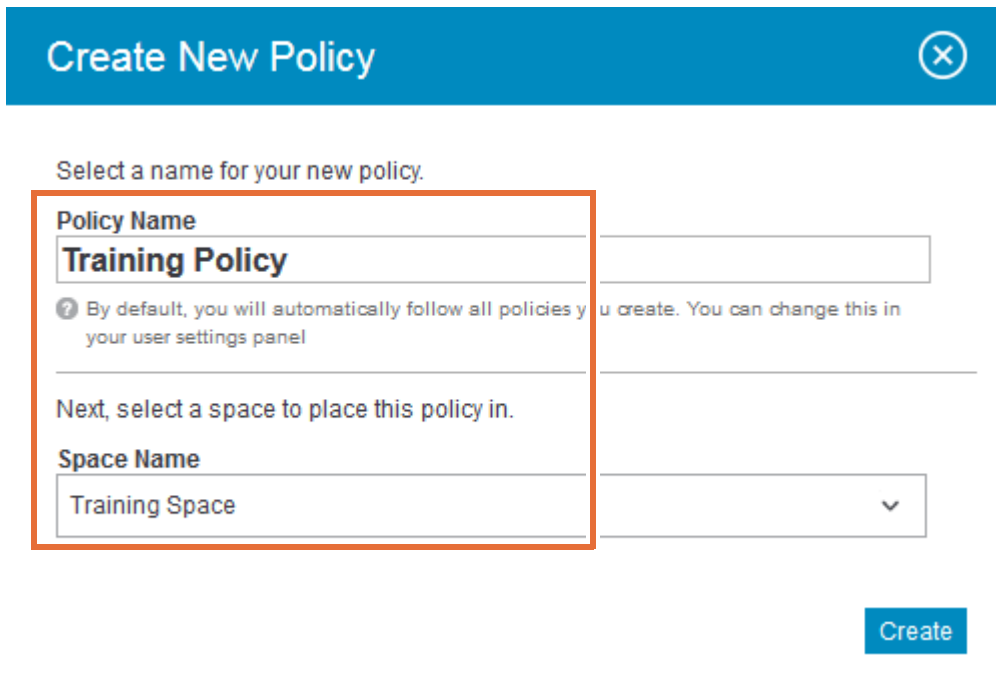


- \_\_\_ 3. Capture a policy.
- \_\_\_ a. Click **+ Create New Policy** on the right of the Policies page.



- \_\_\_ b. Name the policy: Training Policy

- \_\_\_ c. Select the **Training Space** space from the **Space Name** list.



**Create New Policy** ✕

Select a name for your new policy.

**Policy Name**  
**Training Policy**

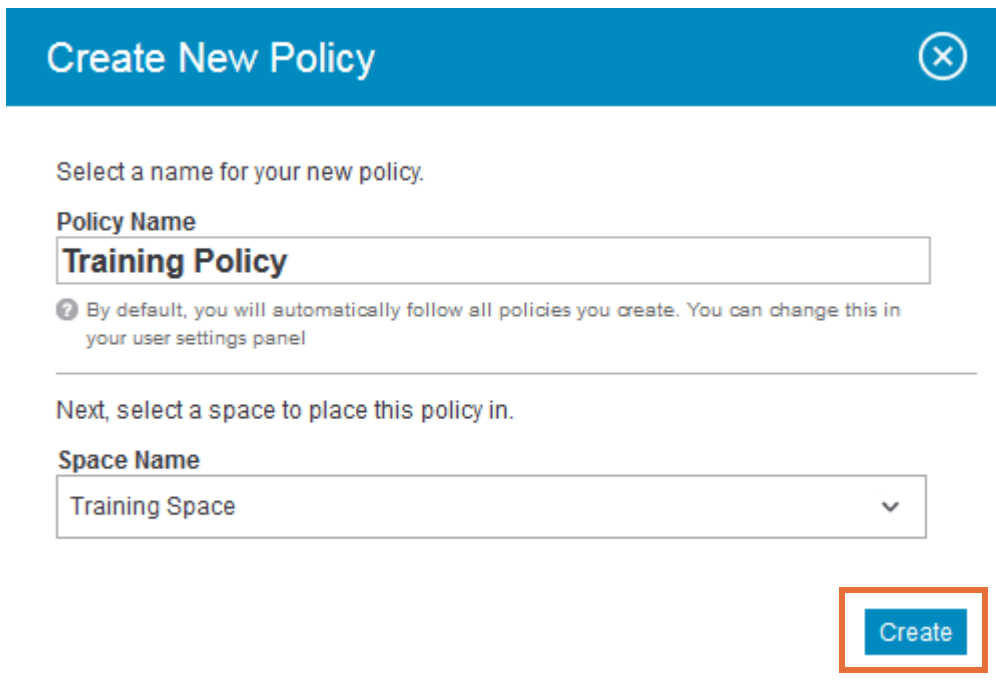
? By default, you will automatically follow all policies you create. You can change this in your user settings panel

Next, select a space to place this policy in.

**Space Name**  
Training Space ▼

**Create**

- \_\_\_ d. Click **Create** to complete the creation of the policy.



**Create New Policy** ✕

Select a name for your new policy.

**Policy Name**  
**Training Policy**

? By default, you will automatically follow all policies you create. You can change this in your user settings panel

Next, select a space to place this policy in.

**Space Name**  
Training Space ▼

**Create**

- \_\_\_ 4. Add details to the policy page.
- \_\_\_ a. Click the **Description** area to access the editor.

The screenshot shows the BlueworksLive interface. The top navigation bar is blue with the logo and links for Work, Community, and Library. Below the navigation bar, the breadcrumb trail reads "Training Space > Training Policy" followed by a dropdown arrow, a star icon, and an information icon. A link "+ Add Tags" is visible. The main content area has a "Description" section with a sub-link "Click here to edit the policy description" highlighted by an orange rectangular box. Below this is a "References" section with an "Add" button and a message stating "There are currently no references attached." and instructions to click "Add" to attach documentation or links.

- \_\_\_ b. Add the following description: Training policy for Blueworks Live

This screenshot shows the same BlueworksLive interface, but the "Description" section is now in an edit mode. An orange box highlights the text area where "Training policy for Blueworks Live" has been typed. Above the text is a rich text editor toolbar with icons for bold (B), italic (I), bulleted list, numbered list, font size (10pt), indent, link, unlink, image, text color, background color, and undo. The word "Blueworks" in the text is underlined with a red squiggly line, indicating a spelling correction suggestion.

- \_\_\_ c. Click outside the editor to save the description.

- \_\_\_ d. Click **Add** to add a reference for the policy.

### Description

Training policy for Blueworks Live

### References

*There are currently no references attached.*

Click **Add** to attach supporting documentation or to provide a link to where more information about this policy is stored.

Add ▾

- \_\_\_ e. Select the **Hyperlink** option.

### Description

Training policy for Blueworks Live

### References

*There are currently no references attached.*

Click **Add** to attach supporting documentation or to provide information about this policy is stored.

Add ▾

File attachment  
Hyperlink

- \_\_\_ f. Enter the link name: What is a Policy?
- \_\_\_ g. Enter the URL for the link: `http://en.wikipedia.org/wiki/Policy`

### Add a Hyperlink

Name of Link

What is a Policy?

Hyperlink URL

`http://en.wikipedia.org/wiki/Policy`

Add

- \_\_\_ h. Click **Add** to complete the link reference.

### Add a Hyperlink

Name of Link

What is a Policy?

Hyperlink URL

<http://en.wikipedia.org/wiki/Policy>

Add

- \_\_\_ i. Click the link to verify that the reference link is valid.

BlueworksLive

WorkCommunityLibrary

+

Training Space > Training Policy


★ ⓘ

+ Add Tags

Description

Training policy for Blueworks Live

References

What is a Policy?  
Added by User 1 on 18-Jan-2016

Add ▾

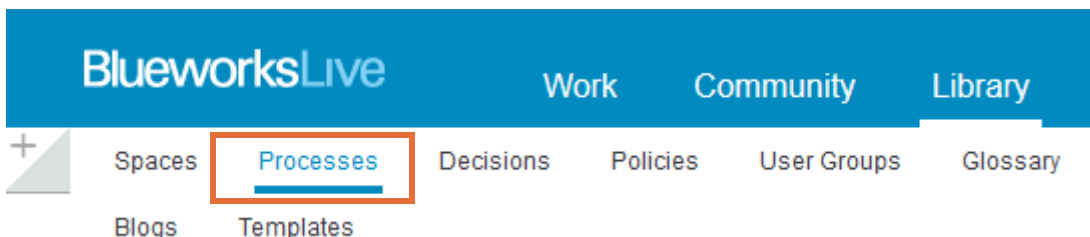
⊖

- \_\_\_ j. The link opens in a default browser window.



## Part 2: Add a policy to a blueprint process

- \_\_\_ 1. Add the policy to the process details.
- \_\_\_ a. Click the **Library** link at the top of the Blueworks Live interface.
- \_\_\_ b. Click the **Processes** tab.





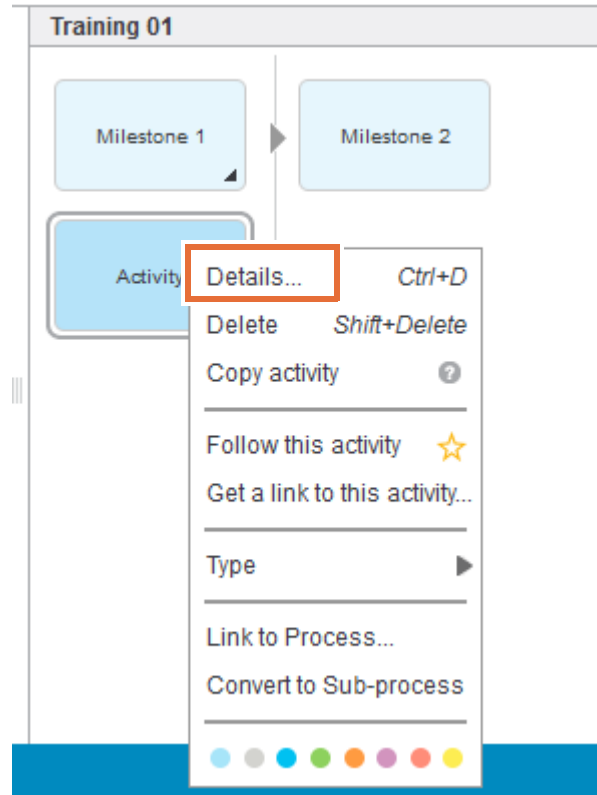
\_\_\_ c. Click the **Training 01** process.

The screenshot shows the BlueworksLive interface. The top navigation bar includes 'Work', 'Community', and 'Library'. The 'Library' tab is active, and the 'Processes' sub-tab is selected. A search bar for 'search processes' is visible. Below the navigation, there are filters for 'Active' and 'Processes (9)'. A list of processes is displayed, including 'Claims Payment', 'Document Review', 'Hiring - Onboarding', 'Hiring - Orientation CD Generation', 'Hiring Requisition', 'HR Management', 'Process Blueprint Review', 'Simple Checklist', and 'Training 01'. The 'Training 01' process is highlighted with a red box.

\_\_\_ d. Right-click the blue **Activity** in the Discovery Map.

The screenshot shows the BlueworksLive interface for the 'Training 01' process. The 'Discovery Map' tab is selected, and the 'Training 01' process is displayed. The 'Process Outline' on the left shows 'Training 01' with 'Milestone 1' and 'Milestone 2'. The 'Discovery Map' on the right shows a flowchart with 'Milestone 1' and 'Milestone 2'. The 'Activity' box under 'Milestone 1' is highlighted with a red box.

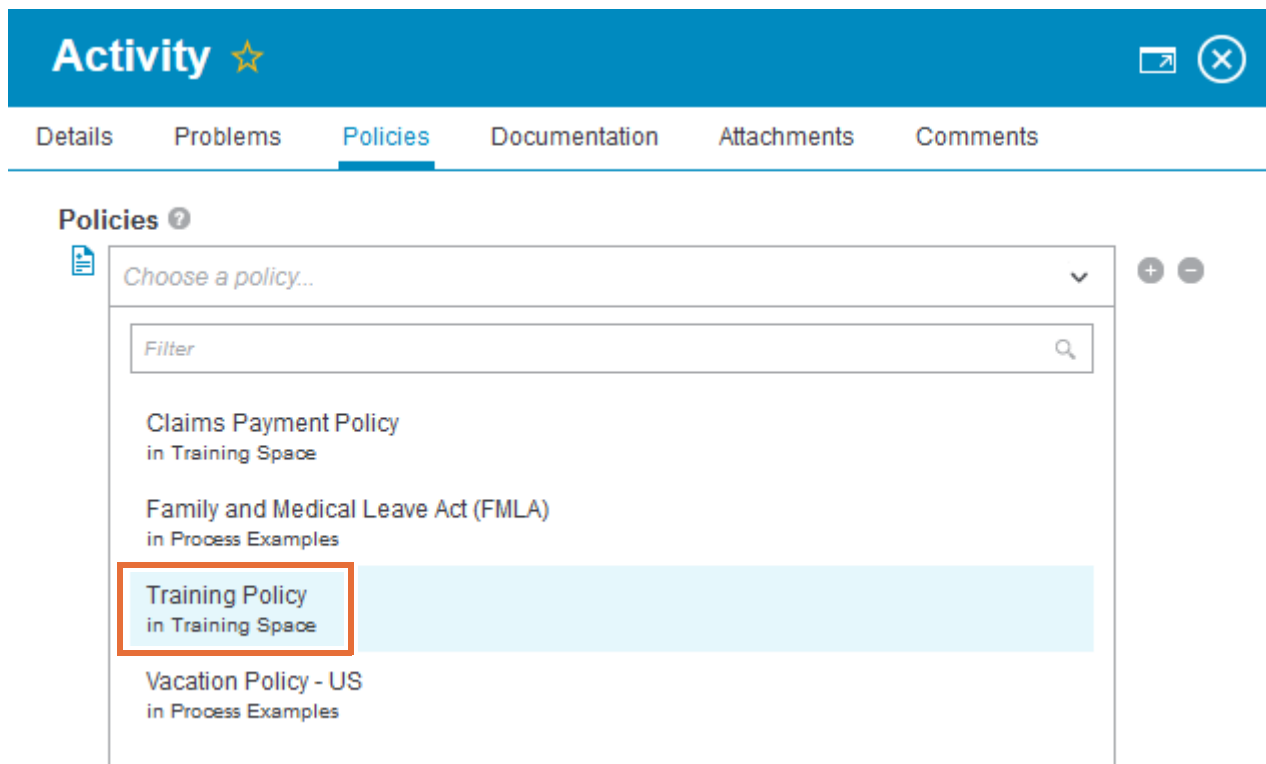
- \_\_\_ e. Select the **Details** option.



- \_\_\_ f. Click the **Policies** tab in the Activity dialog box.

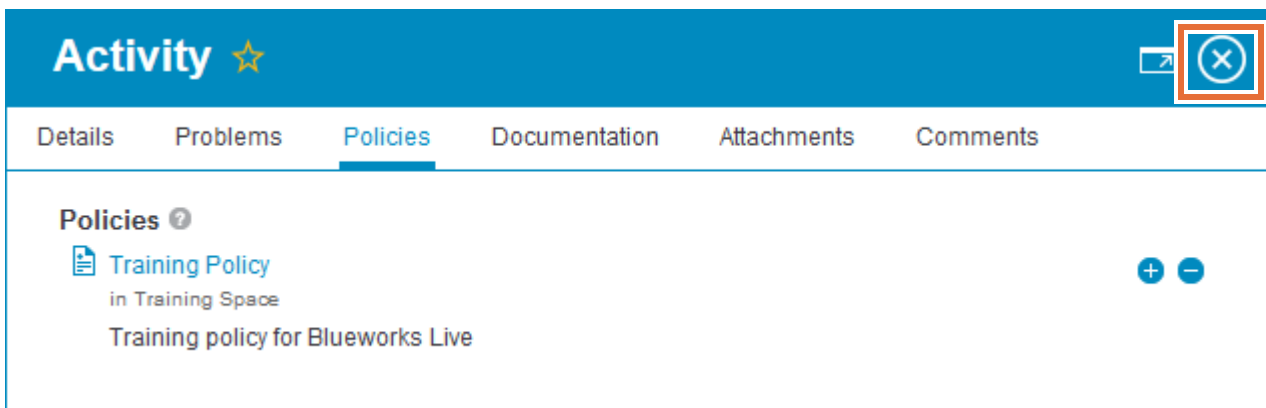


- \_\_\_ g. Select the **Training Policy** from the policies list.



The screenshot shows the 'Activity' page with a blue header bar containing the word 'Activity' and a star icon. Below the header is a navigation bar with tabs: 'Details', 'Problems', 'Policies' (selected), 'Documentation', 'Attachments', and 'Comments'. The main content area is titled 'Policies' with a help icon. It features a dropdown menu labeled 'Choose a policy...' with a search filter. The dropdown list contains four items: 'Claims Payment Policy in Training Space', 'Family and Medical Leave Act (FMLA) in Process Examples', 'Training Policy in Training Space' (highlighted with a red box), and 'Vacation Policy - US in Process Examples'. To the right of the dropdown are '+' and '-' icons.

- \_\_\_ h. Click **X** to complete the policy addition.



The screenshot shows the 'Activity' page with the same navigation bar. The 'Policies' tab is selected, and the list now includes 'Training Policy in Training Space' with the description 'Training policy for Blueworks Live'. In the top right corner of the blue header bar, there is a red box highlighting a close button (an 'X' icon inside a circle).

- \_\_\_ 2. Verify **Where Used** for the policy.
- \_\_\_ a. Click **Library** at the top of the Blueworks Live interface.

\_\_\_ b. Click the **Policies** tab.

The screenshot shows the BlueworksLive interface. At the top, there's a navigation bar with 'Work', 'Community', and 'Library' tabs. The 'Library' tab is active, and a search bar labeled 'search policies' is visible. Below this, a secondary navigation bar includes 'Spaces', 'Processes', 'Decisions', 'Policies' (highlighted with an orange box), 'User Groups', 'Glossary', and 'Blogs'. Under 'Policies', there's a filter dropdown set to 'Active' and a count 'Policies (2)'. Below the filter, two policy cards are displayed: 'Claims Payment Policy' (last modified by User 1 on 29-Dec-2015) and 'Training Policy' (last modified by User 1 on 18-Jan-2016).

\_\_\_ c. Click **Training Policy**.

This screenshot is identical to the previous one, showing the BlueworksLive interface with the 'Policies' tab selected. The 'Training Policy' card is now highlighted with an orange box, indicating it is the selected item.

\_\_\_ d. Verify that the policy is used in the *Training 01* process in the **Where Used** section of the policy page.

### Where Used

1 Space

1 Process

0 Decisions

1 Occurrence

The 'Where Used' section shows a list of items. The 'Training 01' process is highlighted with an orange box. It includes a small icon of a document with a checkmark and the text 'Training 01' and 'Last modified on 18-Jan-2016'.

Training Space

## End of exercise

## Exercise review and wrap-up

In this exercise, a policy is created in the account. The policy is captured in a process and verified.



# Exercise 6. Conducting a playback

## What this exercise is about

In this exercise, you conduct a playback for a Blueworks Live process model.

## What you should be able to do

After completing this exercise, you should be able to:

- Conduct a playback in Blueworks Live

## Introduction

Playbacks are essential in developing process models. Playbacks encompass validation of process information, such as activity details and process paths. Blueworks Live provides users the ability to step through the process details and paths systematically through built-in product features.

## Requirements

This exercise requires the Blueworks Live account permissions to complete the tasks.

## Exercise instructions

### Preface

This exercise depends on a Blueworks Live account access.

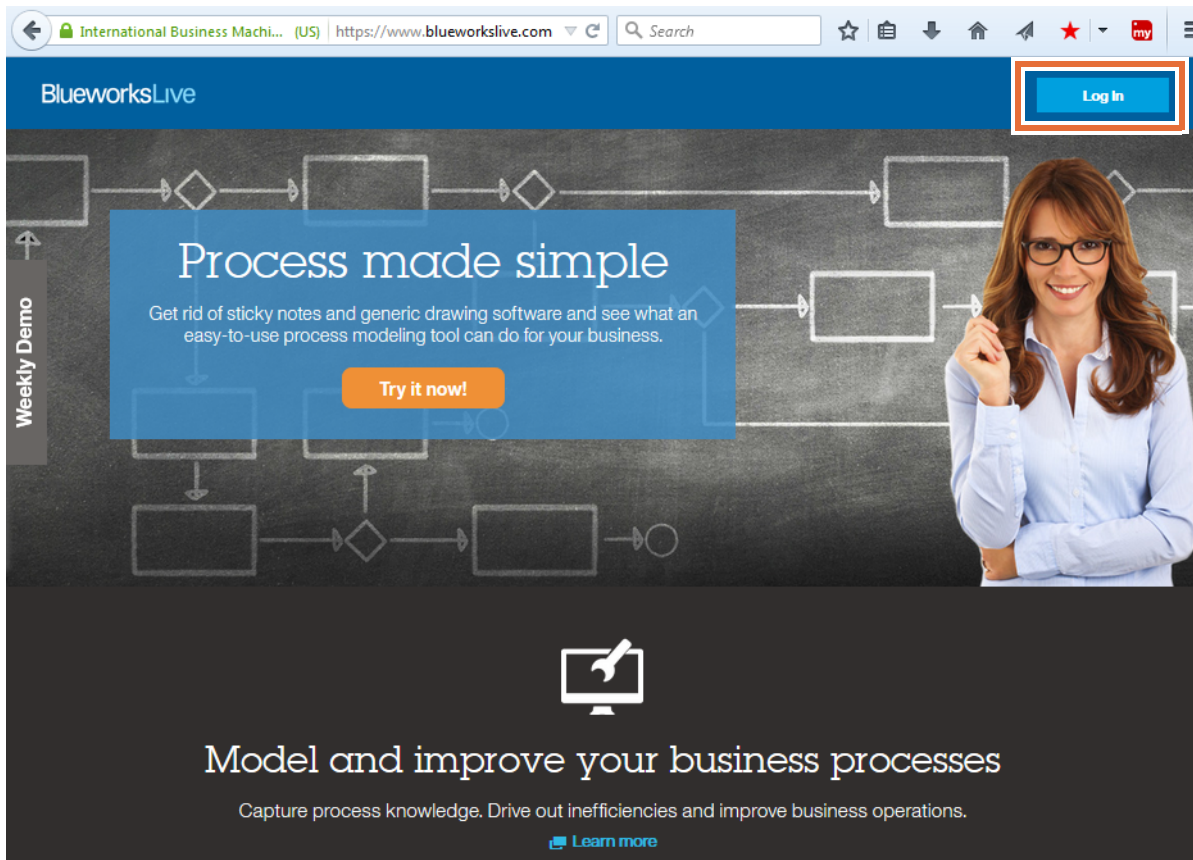
### Part 1: Prepare the process diagram for a playback



#### Note

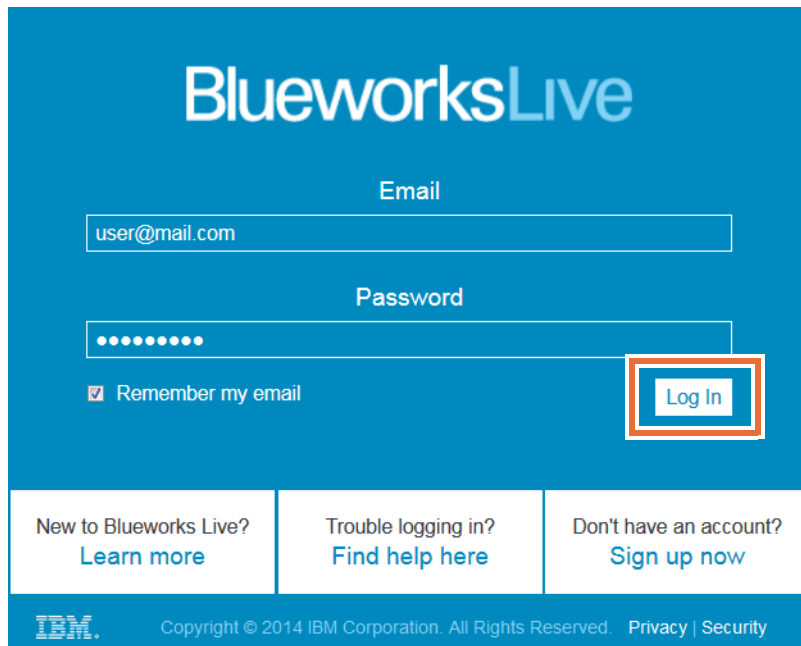
If you are already logged on to Blueworks Live from the previous exercise, skip step 1 in the exercise and proceed to step 2.

- \_\_\_ 1. Log on to Blueworks Live.
  - \_\_\_ a. Open a web browser and enter the following URL:  
`https://www.blueworkslive.com/`
  - \_\_\_ b. Click **Log In** on the upper-right corner of the window.





- \_\_\_ c. Enter the account email address, password, and click **Log In**.



The login page for BlueworksLive has a blue header with the logo. Below it, there are fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). A 'Remember my email' checkbox is checked. A 'Log In' button is highlighted with an orange border. At the bottom, there are three links: 'New to Blueworks Live? Learn more', 'Trouble logging in? Find help here', and 'Don't have an account? Sign up now'. The footer includes the IBM logo and copyright information for 2014.

### Latest news...

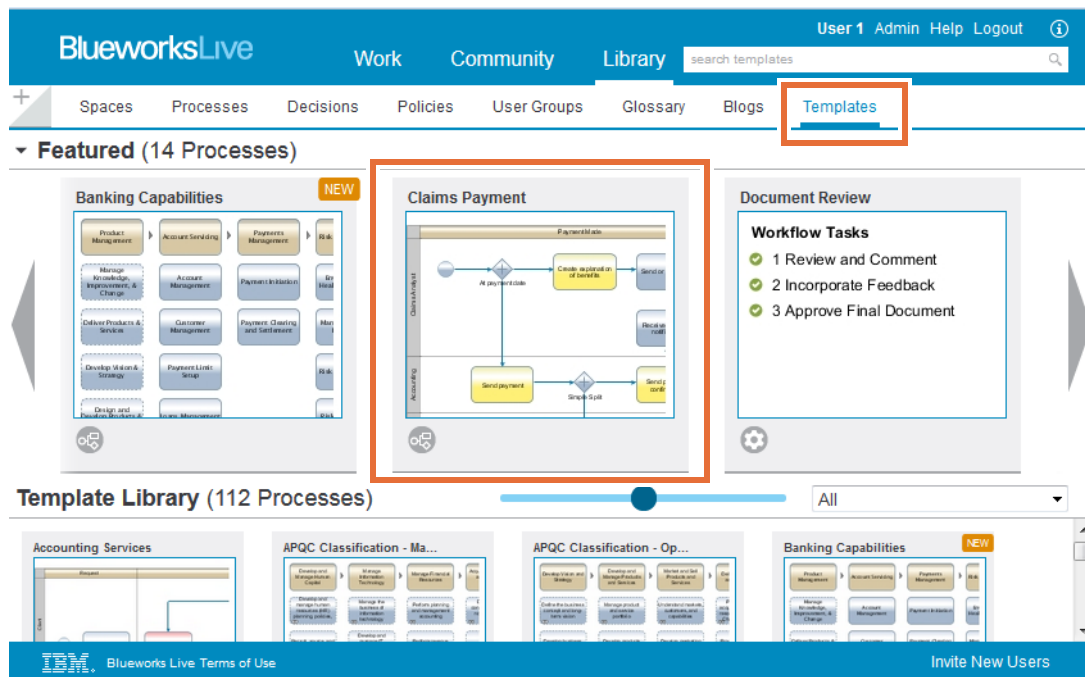
The [December 2015 release](#) is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

The [February 2015 release](#) is here with diagramming productivity and layout enhancements, Help link for Viewers, and filtering on the User Management page of the Admin console.

The [November 2014 release](#) is here with alternative start events, Viewer and Contributor enhancements, and support for Visio 2013 and IE10.

The [August 2014 release](#) is here with a new look and feel.

- \_\_\_ 2. Import the **Claims Payment** template.
- \_\_\_ a. Click **Library** at the top of the Blueworks Live interface.
- \_\_\_ b. Click the **Templates** tab.



The screenshot shows the BlueworksLive Library interface. The top navigation bar includes 'Work', 'Community', and 'Library'. The 'Library' tab is selected, and the 'Templates' sub-tab is highlighted with an orange border. Below the navigation bar, there are sections for 'Featured (14 Processes)' and 'Template Library (112 Processes)'. The 'Claims Payment' template is highlighted with an orange border in the 'Featured' section. It shows a workflow diagram with steps like 'Create a payment of funds', 'Send payment', and 'Send email'. The 'Template Library' section shows various other templates like 'Accounting Services' and 'APQC Classification'.

- \_\_\_ c. Hover the cursor over the **Claims Payment** template.

- \_\_\_ d. Click **Import**.


The screenshot shows the BlueworksLive interface. At the top, there's a navigation bar with 'Work', 'Community', and 'Library' tabs. Below this is a sub-navigation bar with 'Spaces', 'Processes', 'Decisions', 'Policies', 'User Groups', 'Glossary', 'Blogs', and 'Templates'. The 'Featured (14 Processes)' section is visible, showing three process templates: 'Banking Capabilities', 'Claims Payment', and 'Document Review'. The 'Claims Payment' template is highlighted with an orange box, and an 'Import' button is visible below it. A tooltip for 'Claims Payment' is shown, stating: 'A claim and its payment are the end result of the insurance process. Author: IBM'.

- \_\_\_ e. Leave the name of the process the same as **Claims Payment**.

The 'Import Template' dialog box is shown. It has a title bar with a close button. The main text says: 'Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain.' Below this is a 'Process Name' field with the text 'Claims Payment' entered. A tooltip below the field says: 'By default, you will automatically follow all processes you create. You can change this in your user settings panel.' Below the 'Process Name' field is a section titled 'Next, select a space to place this process in.' with a 'Space Name' dropdown menu showing 'Choose a space...'. At the bottom right is an 'Import' button.

- \_\_\_ f. Select a space to save the template import from the **Space Name** list.


- \_\_\_ g. Scroll to find the **Training Space** and click the name.

**Import Template** 

Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain.

**Process Name**


Claims Payment

 By default, you will automatically follow all processes you create. You can change this in your user settings panel.

---


Next, select a space to place this process in.

**Space Name**

Training Space 

Import


- \_\_\_ h. Click **Import** to complete the import.

**Import Template** 

Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain.

**Process Name**


Claims Payment

 By default, you will automatically follow all processes you create. You can change this in your user settings panel.

---

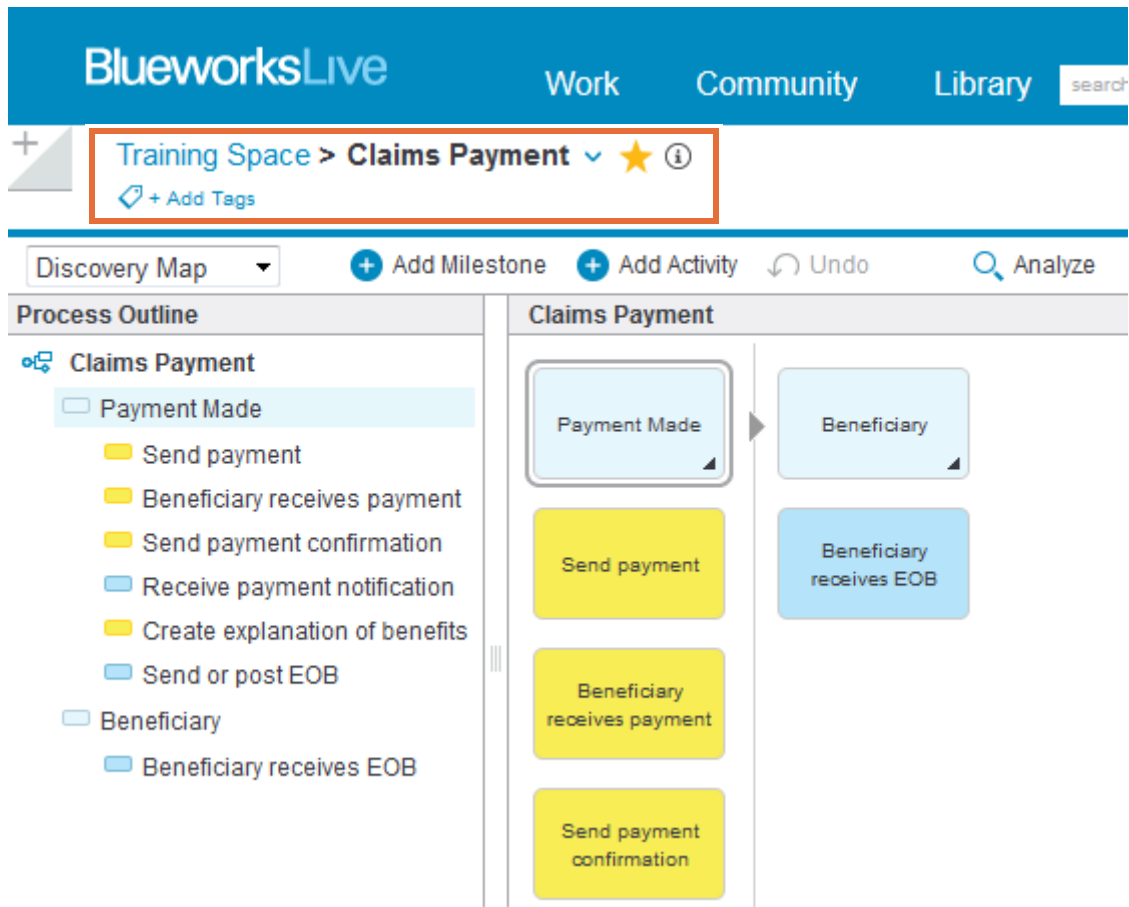
Next, select a space to place this process in.

**Space Name**

Training Space 

Import

- \_\_\_ i. Verify that the Discovery Map is of the **Claims Payment** process in the **Training Space** at the top of the interface.



\_\_\_ 3. Create a policy.

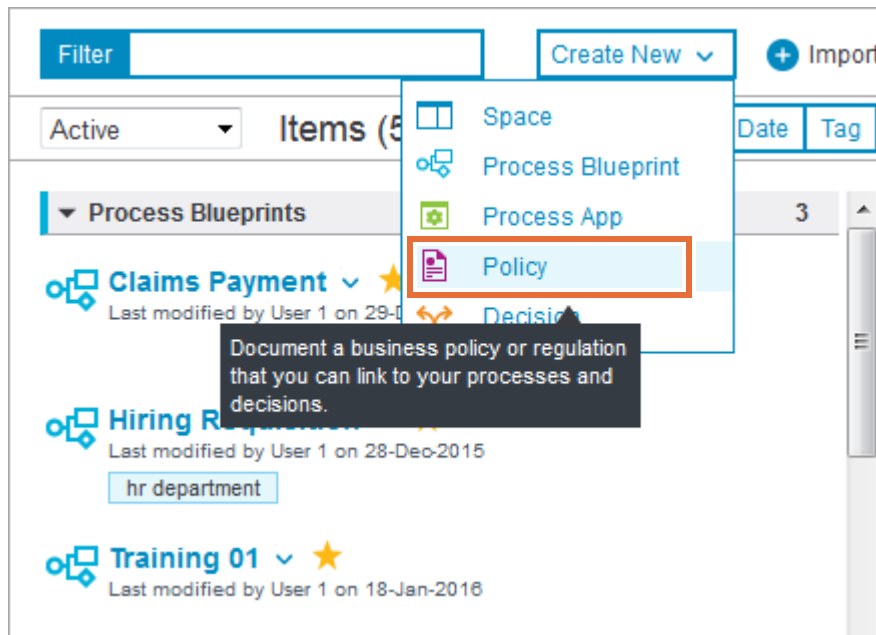
\_\_\_ a. Click the **Training Space** link at the top of the **Discovery Map** interface.

The screenshot shows the BlueworksLive interface. At the top, there's a blue header with 'BlueworksLive' and navigation links: 'Work', 'Community', and 'Library'. Below the header, a breadcrumb trail shows 'Training Space > Claims Payment'. A red box highlights the 'Training Space' link. Below the breadcrumb, there's a '+ Add Tags' button. The main area is divided into two panels. The left panel, titled 'Process Outline', shows a tree view of the 'Claims Payment' process. The right panel, titled 'Claims Payment', shows a visual flowchart of the process. The flowchart starts with 'Payment Made', which leads to 'Beneficiary'. From 'Payment Made', there are three parallel paths: 'Send payment', 'Beneficiary receives payment', and 'Send payment confirmation'. From 'Beneficiary', there are two parallel paths: 'Beneficiary receives EOB' and 'Beneficiary receives payment'.

\_\_\_ b. Click **Create New** on the right of the space page.

The screenshot shows the BlueworksLive interface. At the top, there's a 'Filter' input field. To its right is a 'Create New' button with a dropdown arrow, which is highlighted with a red box. Further right is an 'Import' button. Below these buttons, there's a section titled 'Items (5)' with a dropdown menu set to 'Active'. To the right of this section are tabs for 'Type', 'Name', 'Date', and 'Tag'. Below the tabs, there's a list of items under the heading 'Process Blueprints'. The list contains three items: 'Claims Payment', 'Hiring Requisition', and 'Training 01'. Each item has a dropdown arrow and a star icon. The 'Claims Payment' item is selected, and its details are shown below it, including 'Last modified by User 1 on 29-Dec-2015' and a tag 'hr department'.

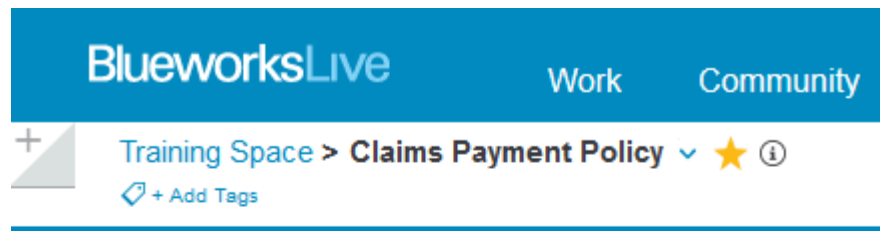
- \_\_\_ c. Select the **Policy** option.



- \_\_\_ d. Name the policy: Claims Payment Policy
- \_\_\_ e. Click **Create** to complete the creation of the policy.

The screenshot shows the 'Create New Policy' dialog box. The title bar is blue with the text 'Create New Policy' and a close button. The main content area is white. It starts with the instruction 'Select a name for your new policy.' followed by a 'Policy Name' label. Below this is a text input field containing the text 'Claims Payment Policy'. A small help icon and text are visible below the input field: '? By default, you will automatically follow all policies you create. You can change this in your user settings panel'. At the bottom right, there is a blue 'Create' button highlighted with a red rectangular box.

- \_\_\_ 4. Add details to the policy.
- \_\_\_ a. Click the **Description** area to access the editor.



### Description

*Click here to edit the policy description*

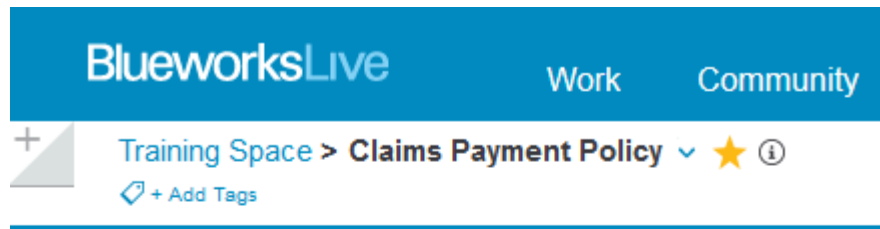
### References

Add ▾

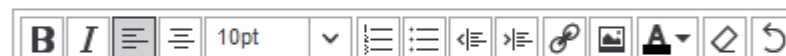
*There are currently no references attached.*

Click **Add** to attach supporting documentation or to provide a link to where more information about this policy is stored.

- \_\_\_ b. Add the following description: Claims under \$5,000 are paid directly to the beneficiary



### Description



Claims under \$5,000 are paid directly to the beneficiary

### References

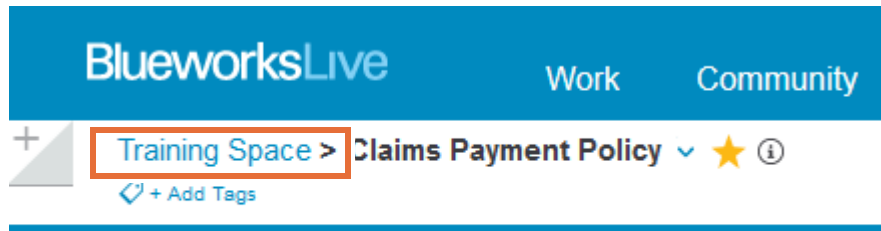
Add ▾

*There are currently no references attached.*

Click **Add** to attach supporting documentation or to provide a link to where more information about this policy is stored.

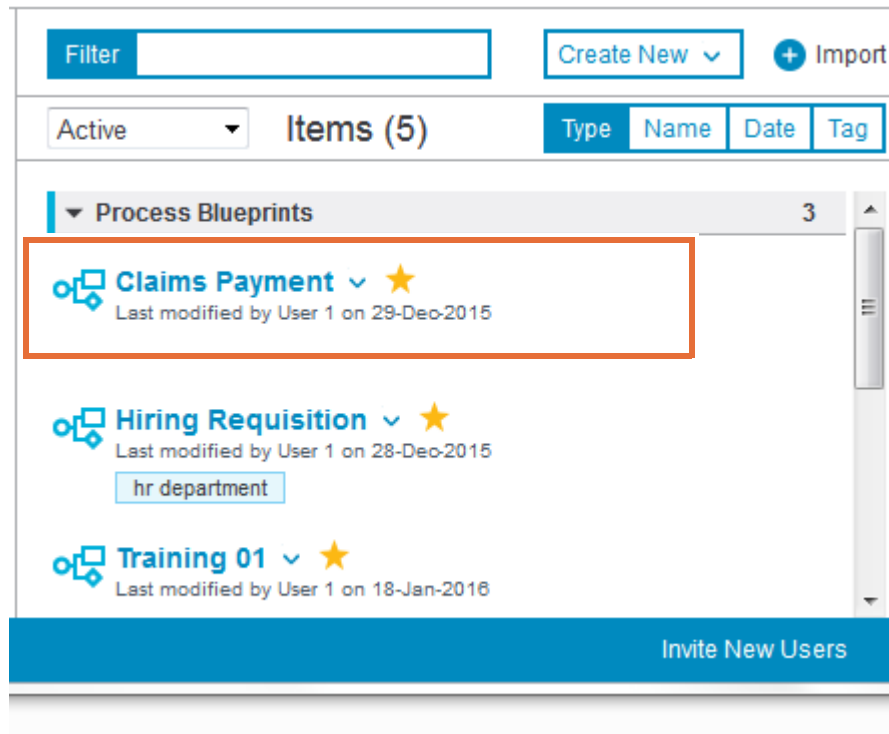
- \_\_\_ c. Click outside the editor to save the description.

- \_\_\_ 5. Add the policy to the process diagram.
- \_\_\_ a. Click the **Training Space** link at the top of the page.



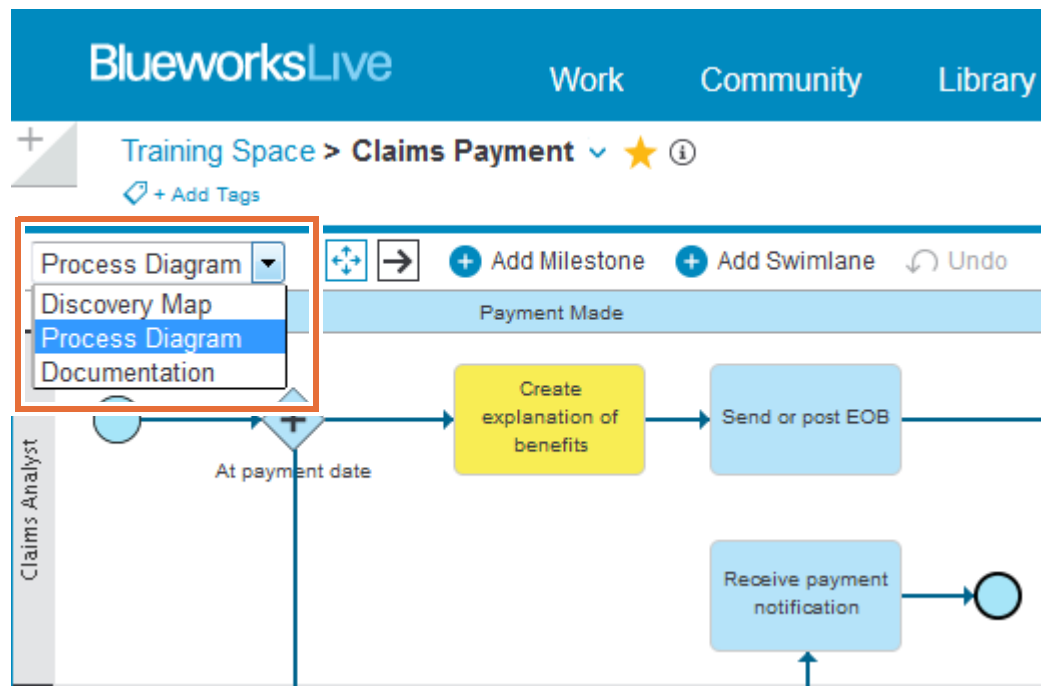
## Description

- \_\_\_ b. Click the **Claims Payment** process on the right side of the space page.



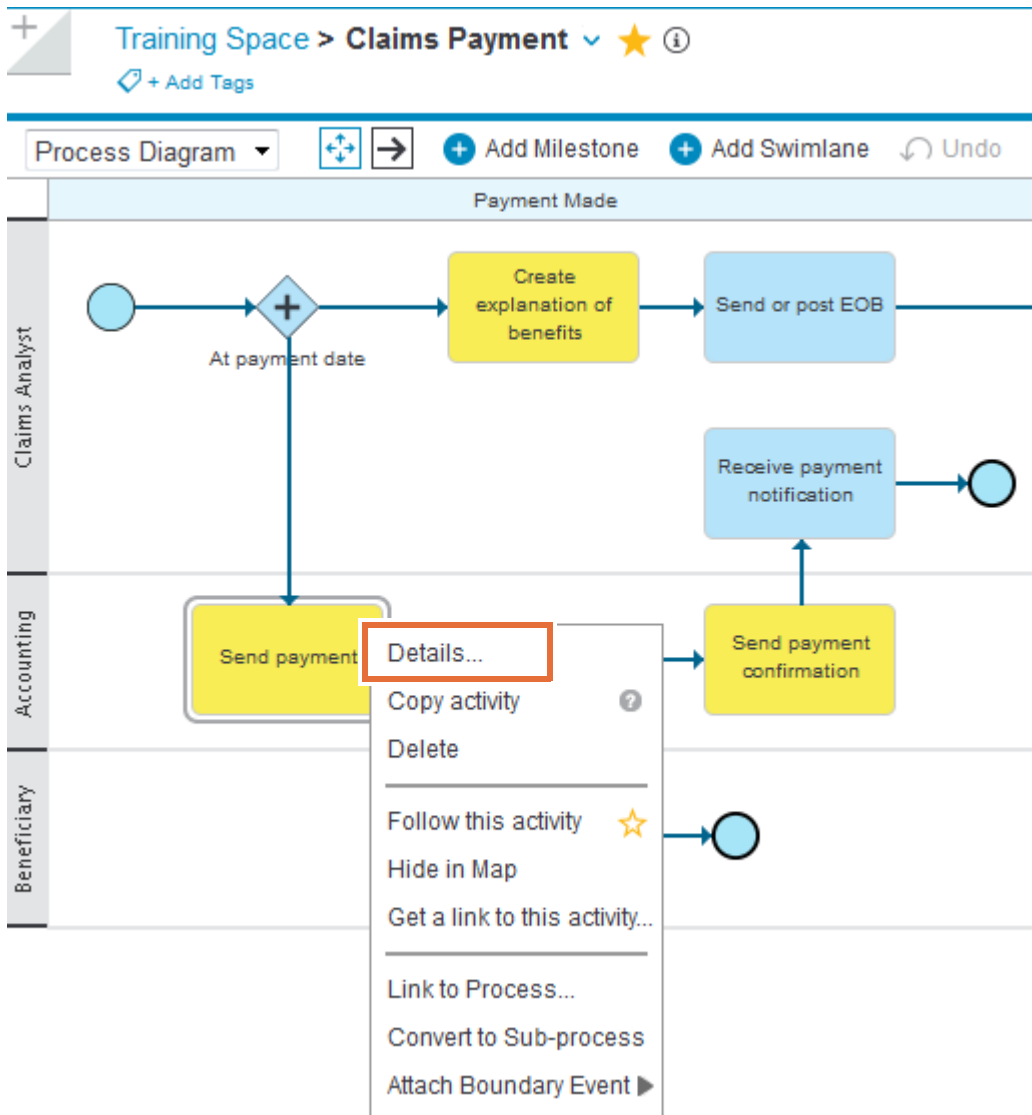


- \_\_\_ c. From the **View** list, select **Process Diagram** to change the view.



- \_\_\_ d. Right-click the **Send Payment** activity.

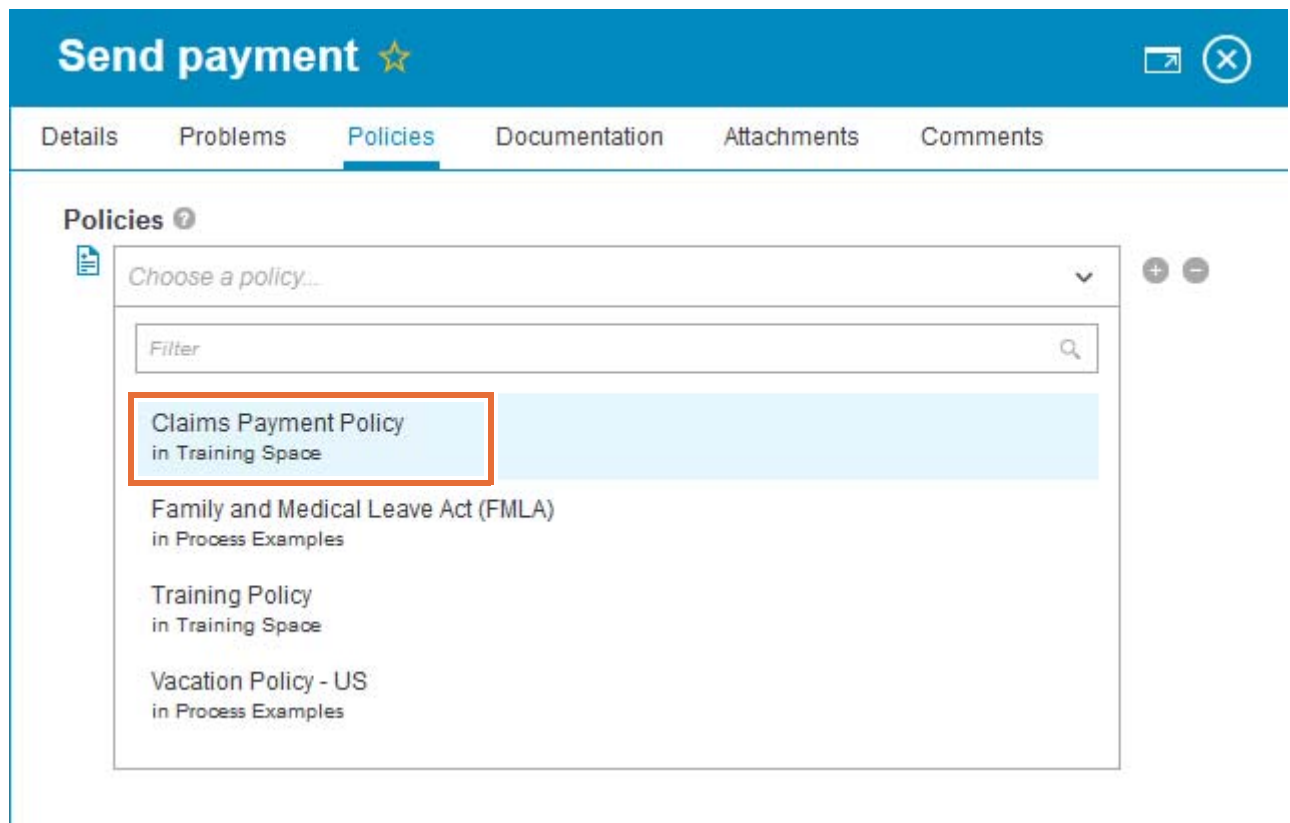
- \_\_\_ e. Select the **Details** option.



- \_\_\_ f. Click the **Policies** tab.

The screenshot shows the "Send payment" task details in IBM Blueworks Live. The top bar is blue with the title "Send payment" and a star icon. Below the title is a tabbed interface with tabs: "Details", "Problems", "Policies", "Documentation", "Attachments", and "Comments". The "Policies" tab is selected and highlighted with a red box. Below the tabs, there is a section titled "Policies" with a question mark icon. Under this section is a dropdown menu with the text "Choose a policy..." and a downward arrow. To the right of the dropdown are two small circular buttons, one with a plus sign and one with a minus sign.

- \_\_\_ g. From the **Choose a policy** list, select **Claims Payment Policy**.



**Send payment** ☆

Details Problems **Policies** Documentation Attachments Comments

**Policies** ?

Choose a policy...

Filter

**Claims Payment Policy**  
in Training Space

Family and Medical Leave Act (FMLA)  
in Process Examples

Training Policy  
in Training Space

Vacation Policy - US  
in Process Examples

- \_\_\_ h. Click **X** to close the dialog box.



**Send payment** ☆

Details Problems **Policies** Documentation Attachments Comments

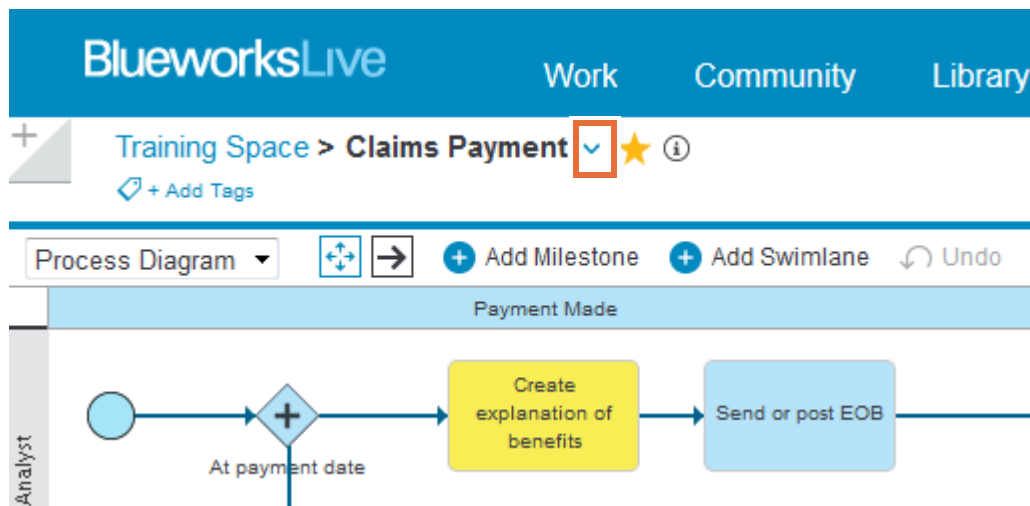
**Policies** ?

**Claims Payment Policy**  
in Training Space

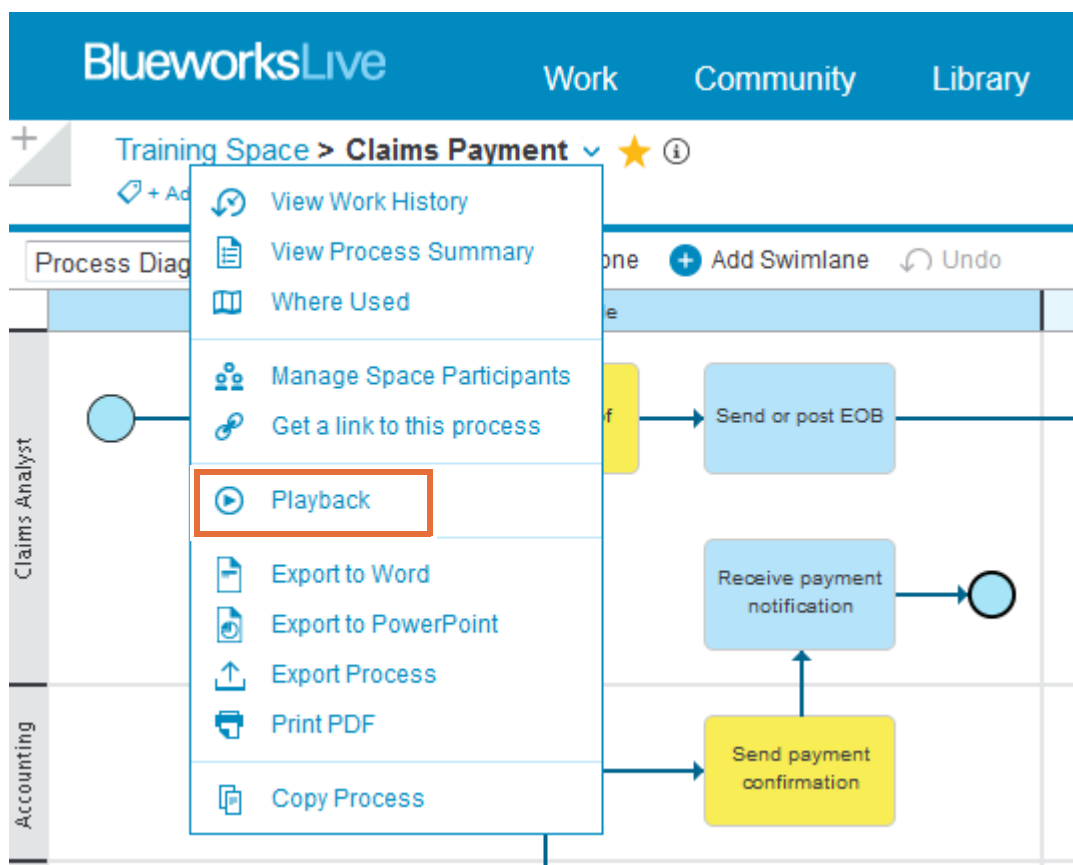
Claims under \$5,000 are paid directly to the beneficiary

## Part 2: Play back the process diagram

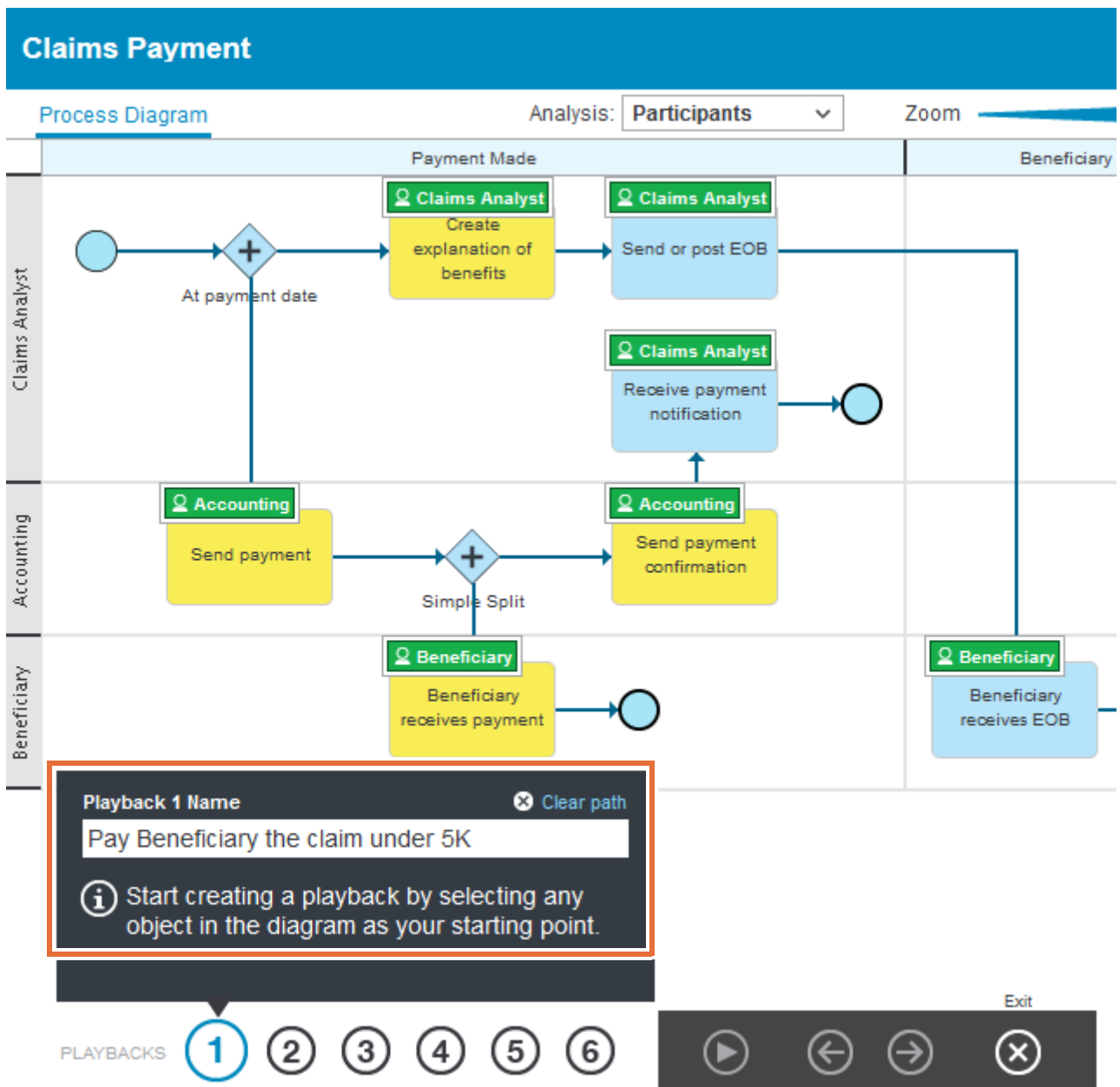
- \_\_\_ 1. Set up the first playback path.
  - \_\_\_ a. Expand **Training Space > Claims Payment** at the top of the process diagram page.



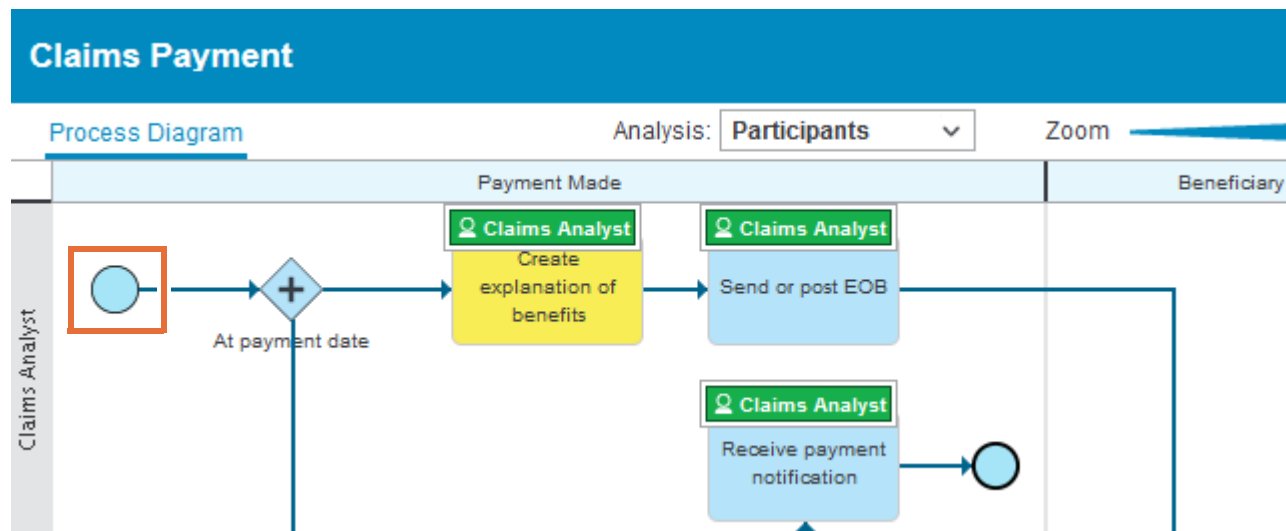
- \_\_\_ b. Click **Playback**.



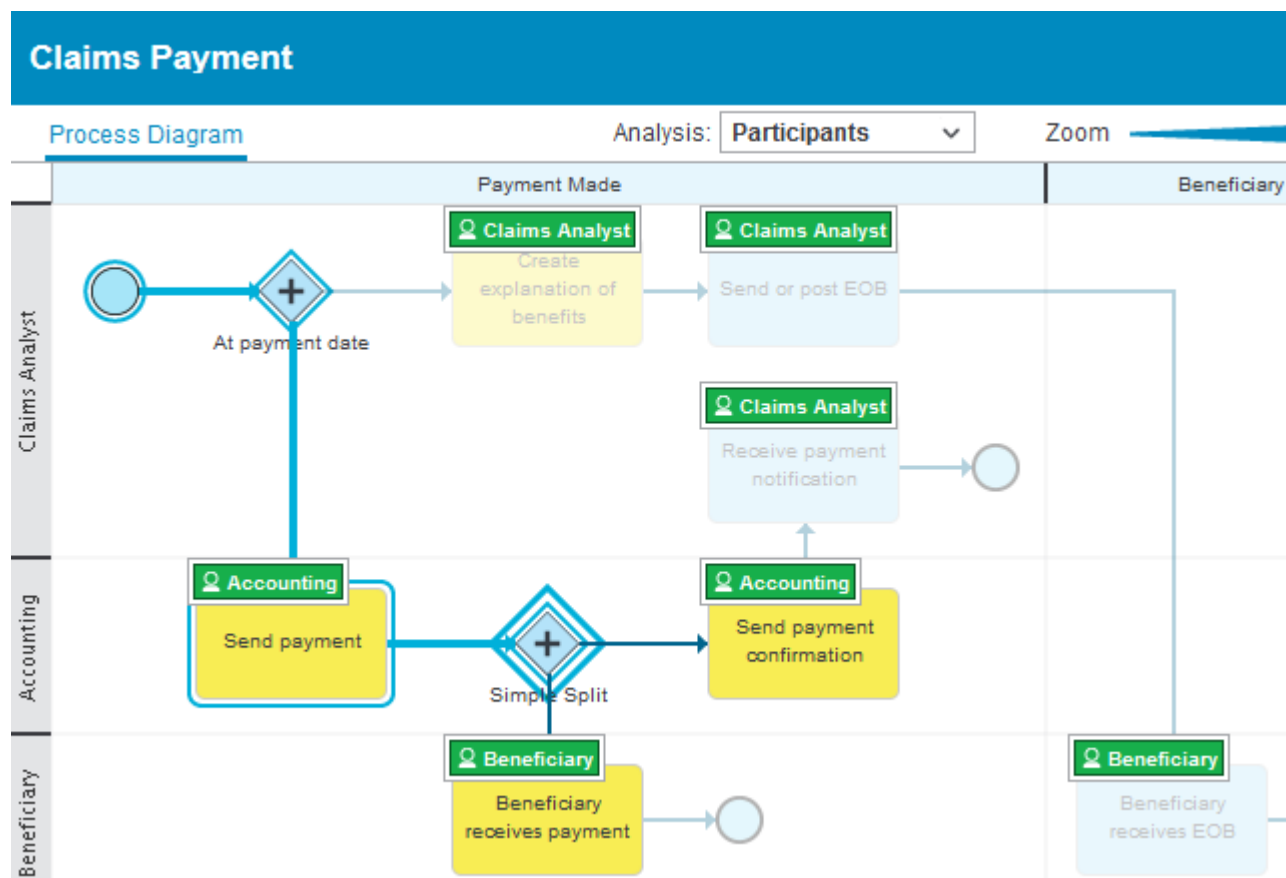
\_\_ c. Enter a name for the playback path: Pay Beneficiary the claim under 5K



- \_\_\_ d. Click the **Start** event in the left side of the diagram.

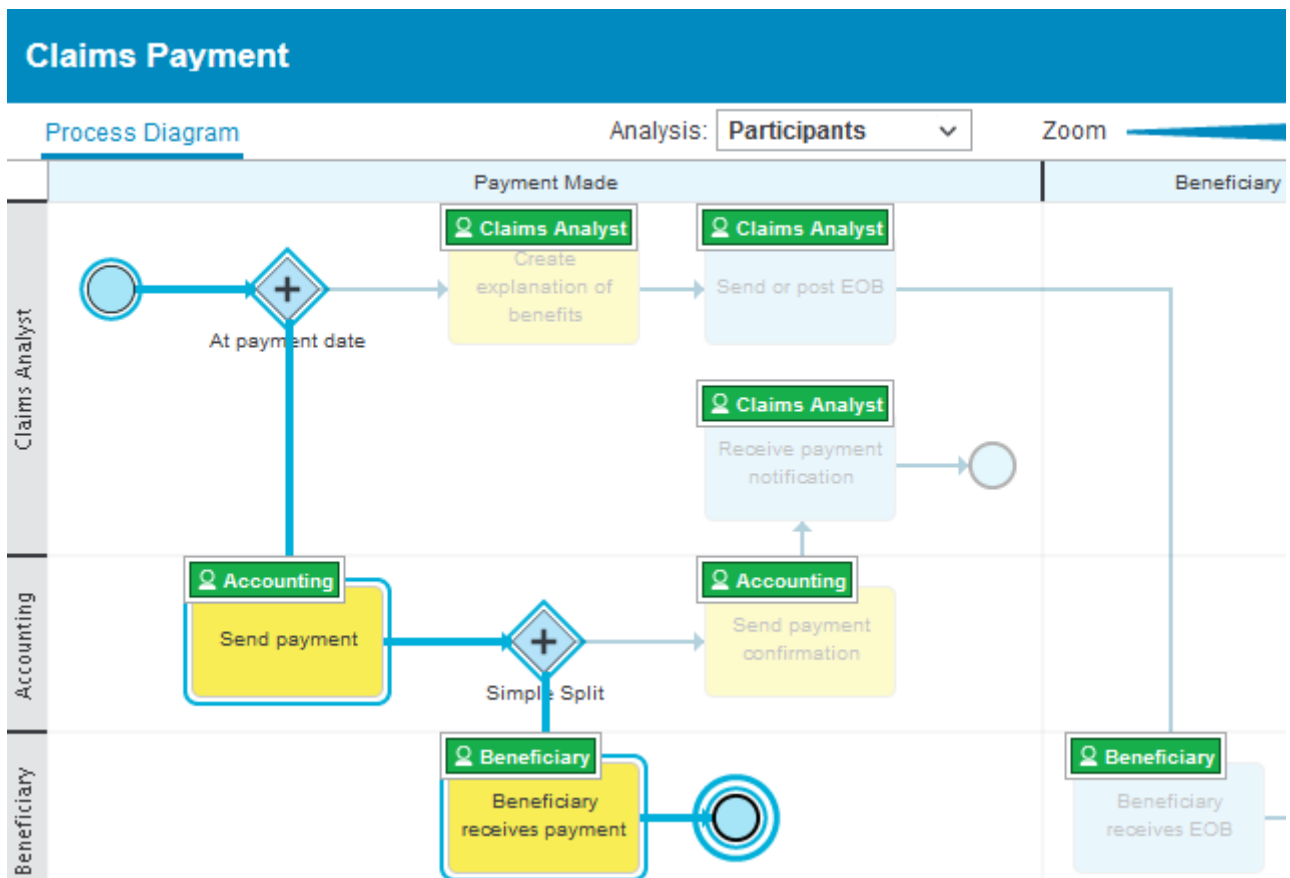


- \_\_\_ e. Click the **At payment date** gateway.
- \_\_\_ f. Click the **Send payment** activity.
- \_\_\_ g. Click the **Simple Split** gateway.



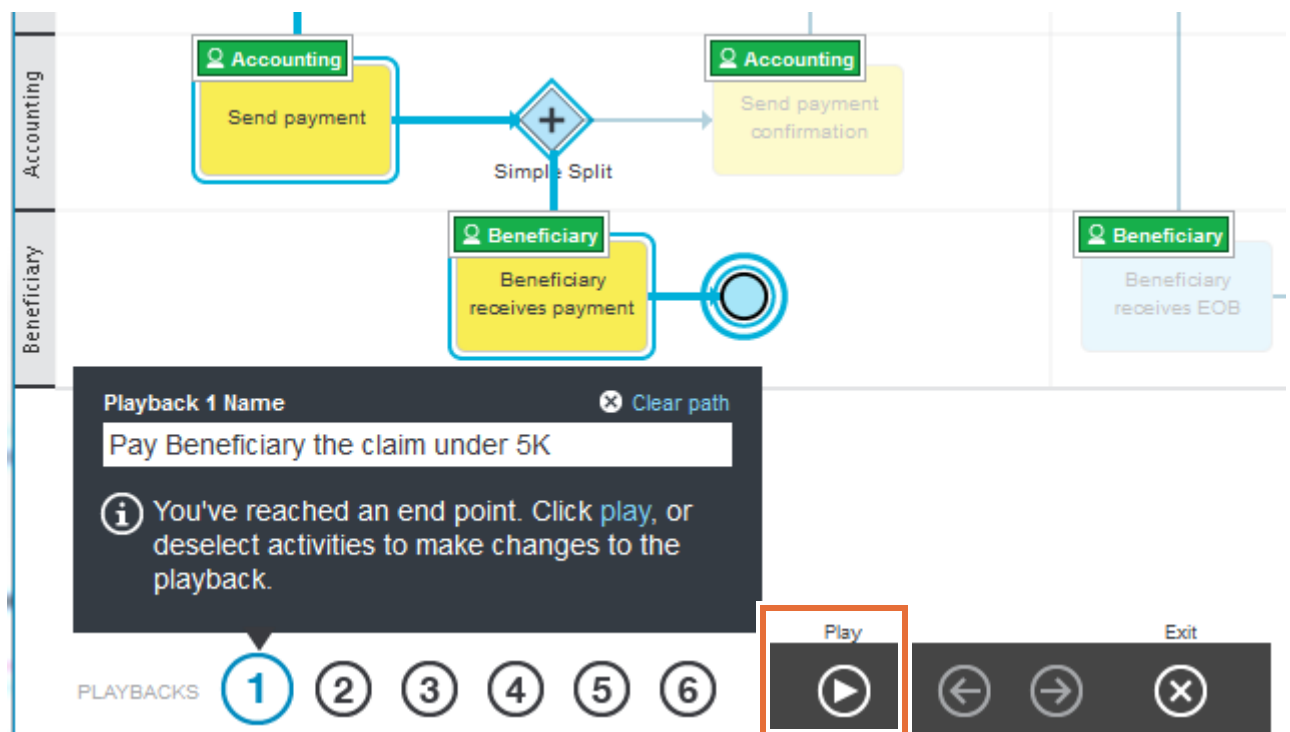
- \_\_\_ h. Click the activity that is labeled **Beneficiary receives payment**.

- \_\_\_ i. Click the **End** activity. The number one path is complete.

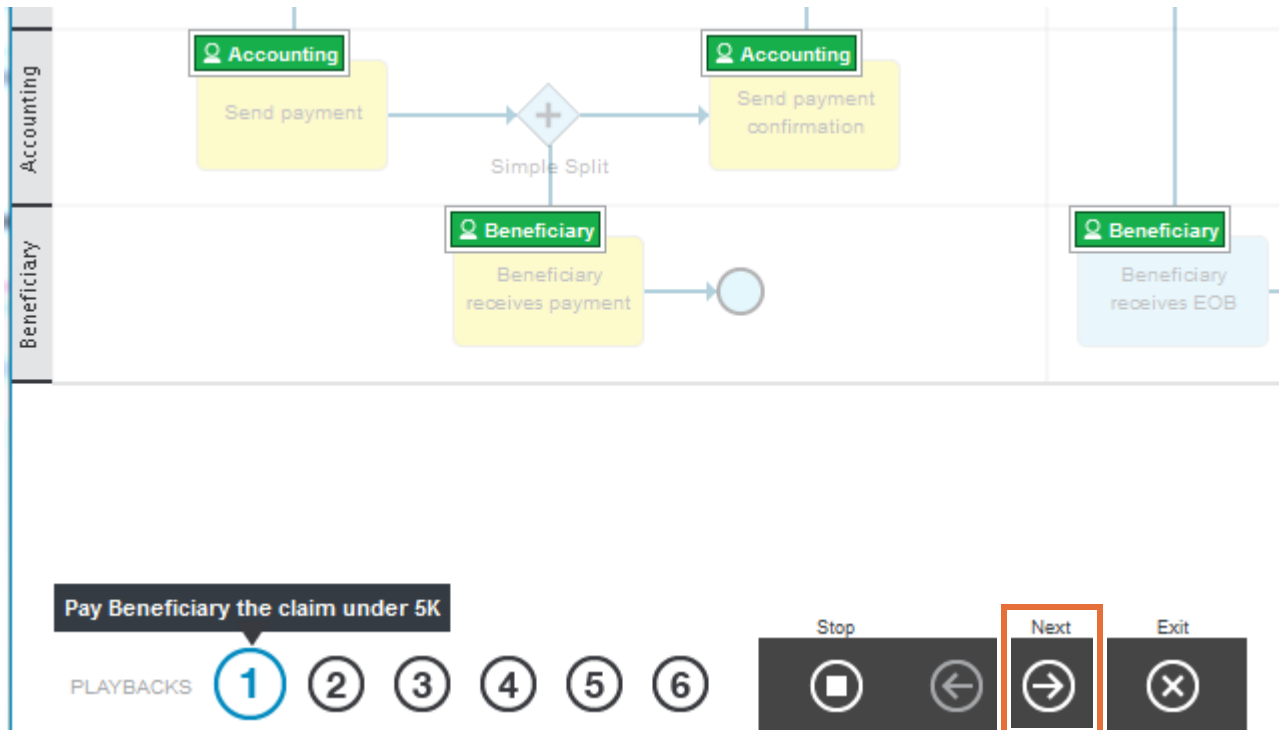


- \_\_\_ 2. Play back path 1.

- \_\_\_ a. Click the **Play** icon.



- \_\_\_ b. Click the **Next** icon one time for each element in the path, beginning with the **Start** event.



- \_\_\_ c. Click the **Next** icon to move to the **At payment date** gateway.
- \_\_\_ d. Click the **Next** icon to move to the **Send payment** activity.
- \_\_\_ e. Verify that the details are correct at the right side of the window.

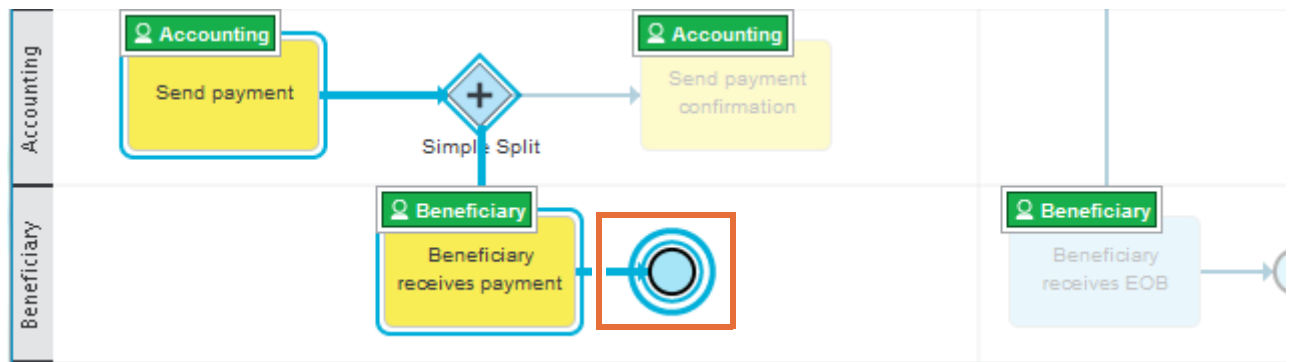
The screenshot shows the 'BlueworksLive' interface. The 'Details' tab is selected, showing the 'Send payment' activity. The details include:

- Participant:** Accounting
- Policies (1):** Claims Payment Policy. Claims under \$5,000 are paid directly to the beneficiary.
- Attachments (0):** There are currently no files attached.

- \_\_\_ f. Click the **Next** icon to move to the **Simple Split** gateway.
- \_\_\_ g. Click the **Next** icon to move to the **Beneficiary receives payment** activity.



- \_\_\_ h. Click the **Next** icon to move to the **End** event.

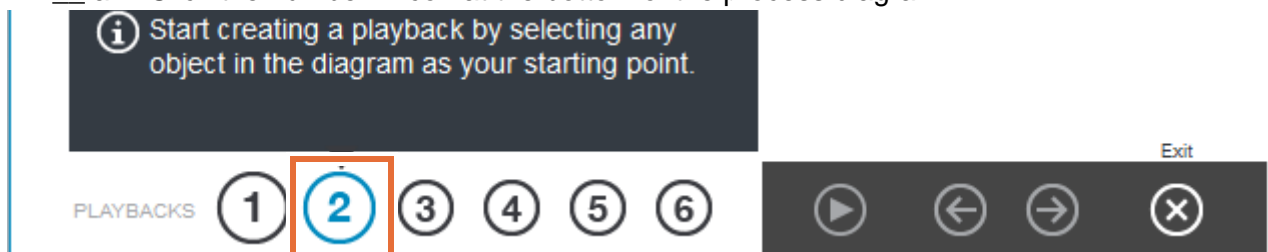


- \_\_\_ i. Verify that the playback for path 1 is complete.

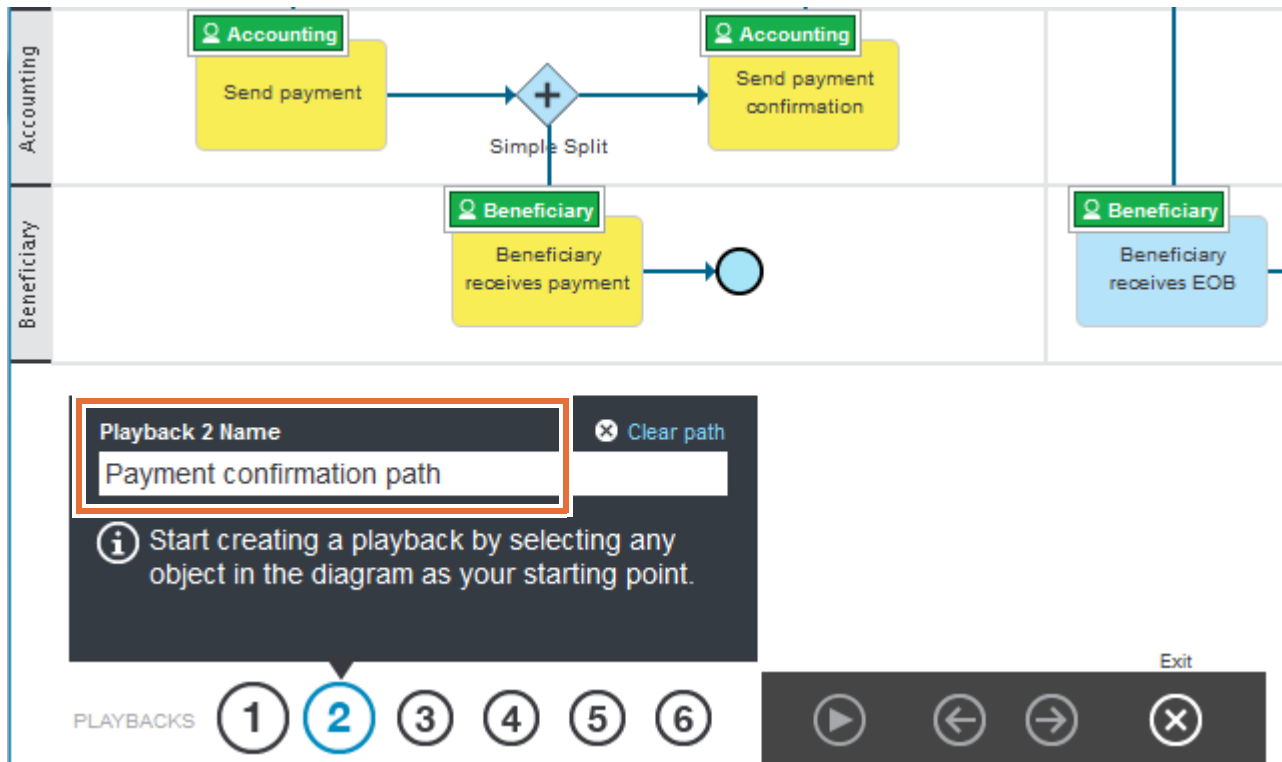


- \_\_\_ 3. Set up the second playback path.

- \_\_\_ a. Click the number **2** icon at the bottom of the process diagram.

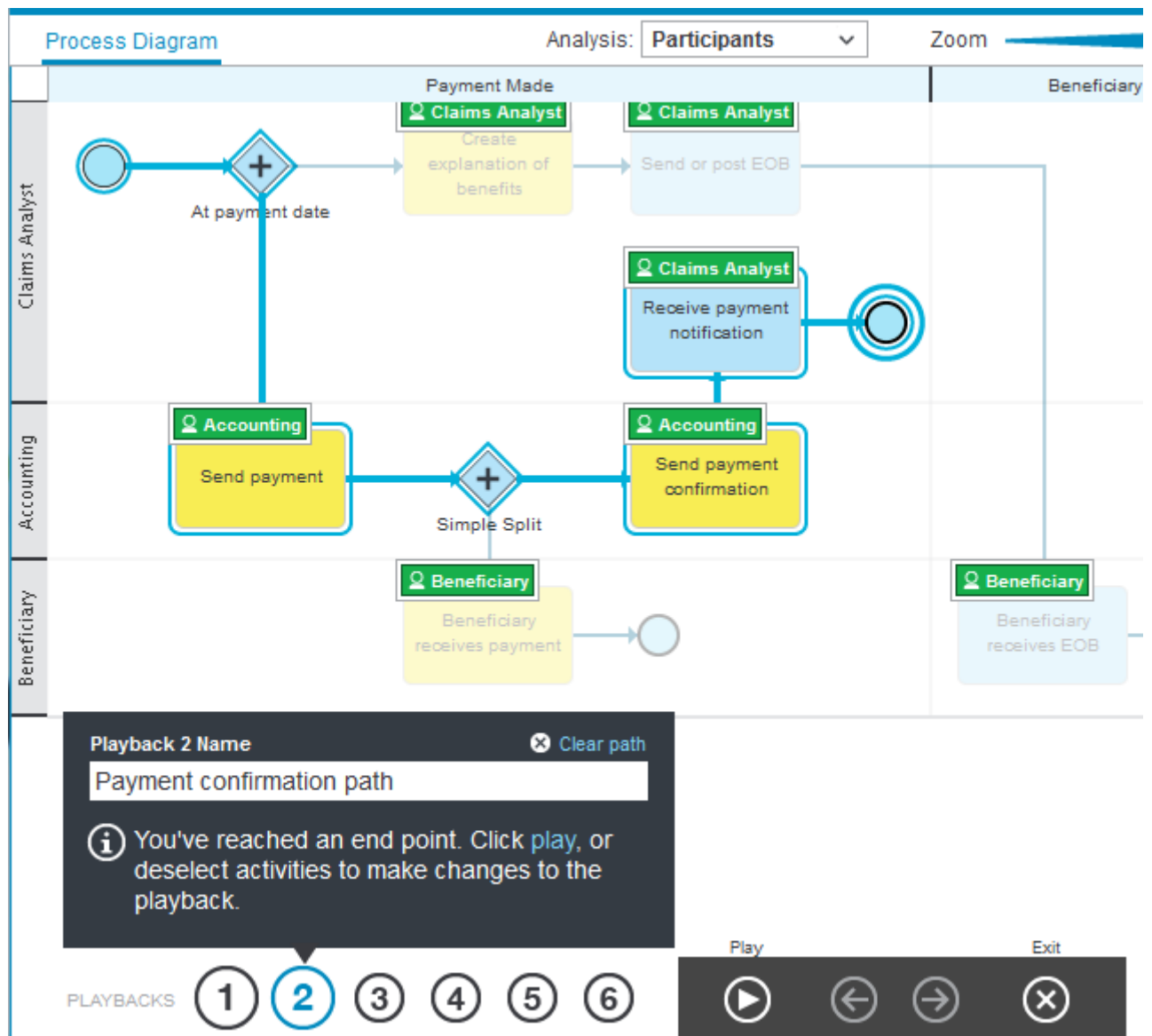


\_\_\_ b. Enter a name for the playback path: Payment confirmation path

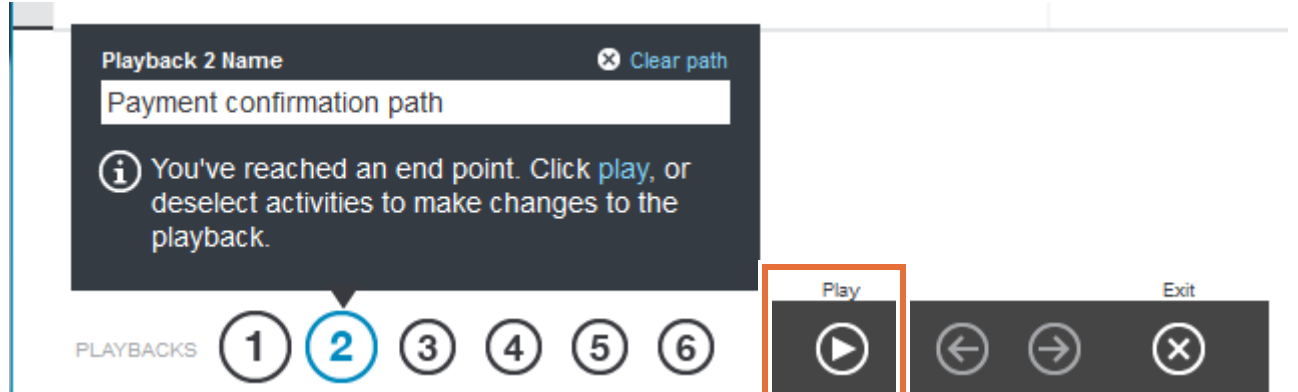


- \_\_\_ c. Click the **Start** event in the left side of the diagram.
- \_\_\_ d. Click the **At payment date** gateway.
- \_\_\_ e. Click the **Send payment** activity.
- \_\_\_ f. Click the **Simple Split** gateway.
- \_\_\_ g. Click the **Send payment confirmation** activity.
- \_\_\_ h. Click the **Receive payment notification** activity.

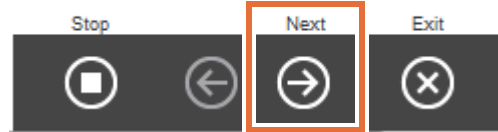
- \_\_\_ i. Click the **End** event. The number two path is complete.



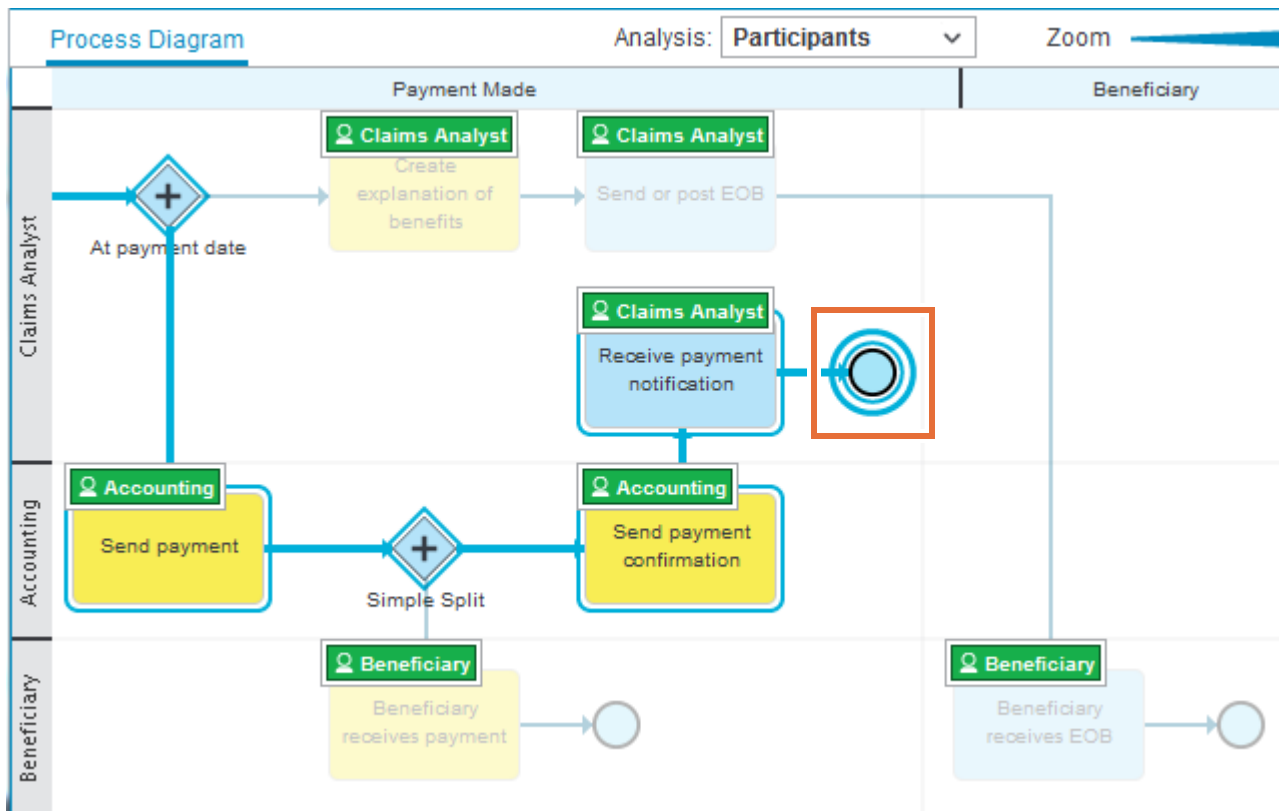
- \_\_\_ 4. Play back path 2.
- \_\_\_ a. Click the **Play** icon.



- \_\_\_ b. Click the **Next** icon one time for each element in the path, beginning with the **Start** event.



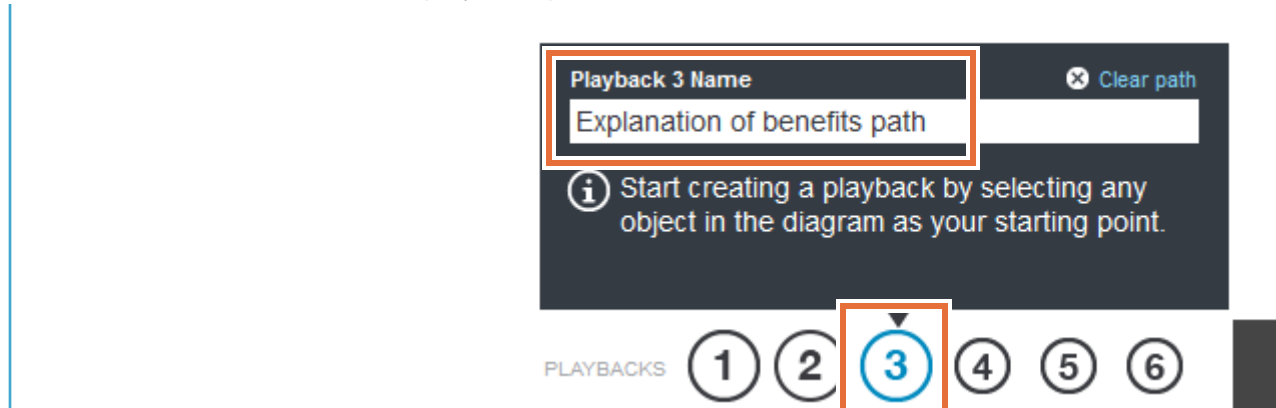
- \_\_\_ c. Click the **Next** icon to move to the **At payment date** gateway.  
 \_\_\_ d. Click the **Next** icon to move to the **Send payment** activity.  
 \_\_\_ e. Click the **Next** icon to move to the **Simple Split** gateway.  
 \_\_\_ f. Click the **Next** icon to move to the **Send payment confirmation** activity.  
 \_\_\_ g. Click the **Next** icon to move to the **Receive payment notification** activity.  
 \_\_\_ h. Click the **Next** icon to move to the **End** event.



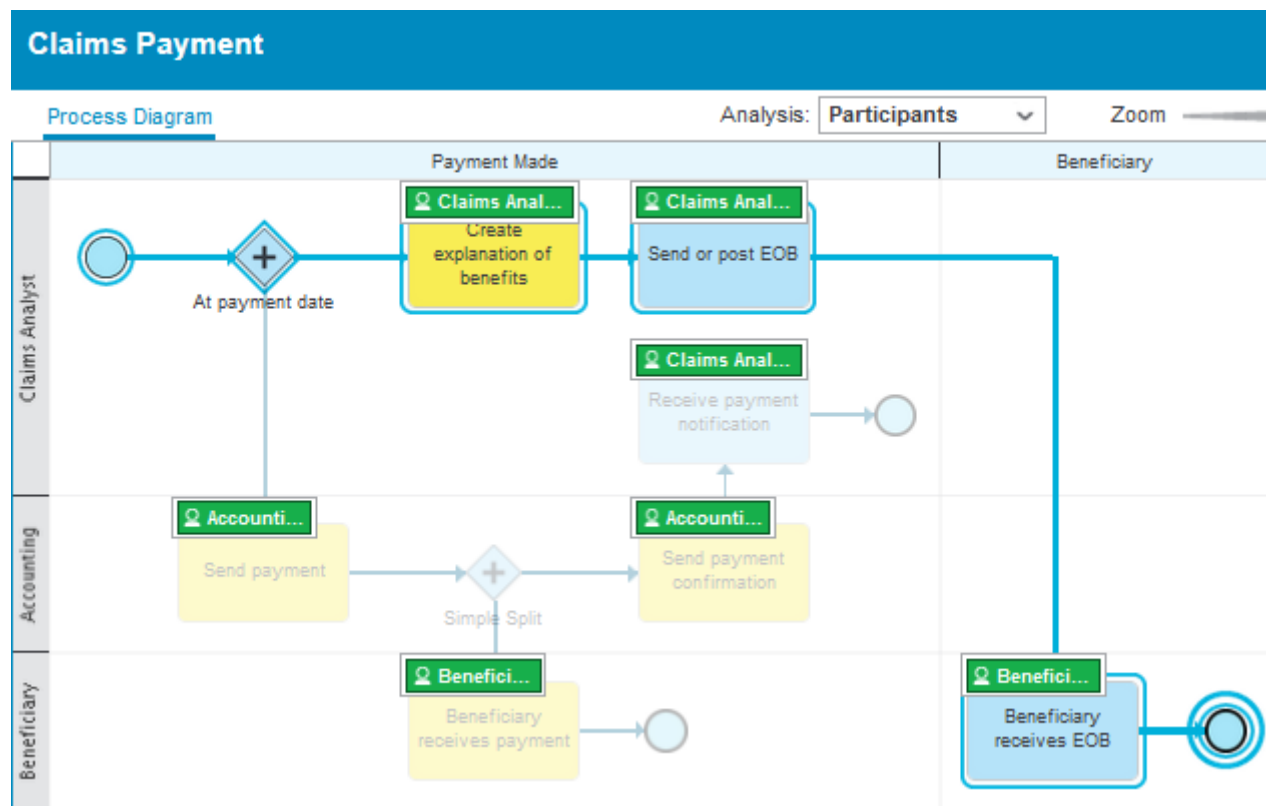
- \_\_\_ i. Verify that the playback for path 2 is complete.



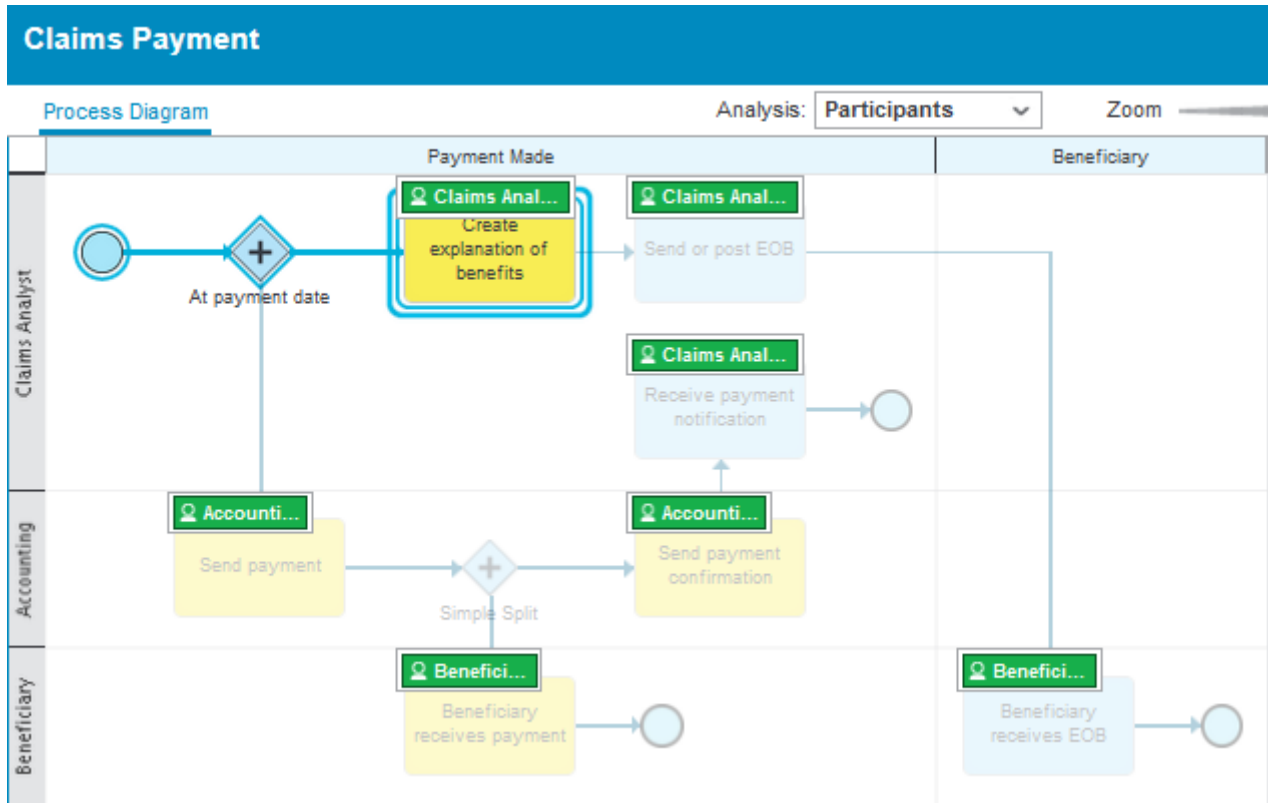
- \_\_\_ 5. Set up the third playback path.
- \_\_\_ a. Click the number **3** icon at the bottom of the process diagram.
- \_\_\_ b. Enter a name for the playback path: Explanation of benefits path



- \_\_\_ c. Click the **Start** event in the left side of the diagram.
- \_\_\_ d. Click the **At payment date** gateway.
- \_\_\_ e. Click the **Create explanation of benefits** activity.
- \_\_\_ f. Click the **Send or post EOB** activity.
- \_\_\_ g. Click the activity that is labeled **Beneficiary receives EOB**.
- \_\_\_ h. Click the **End** event. The number three path is complete.

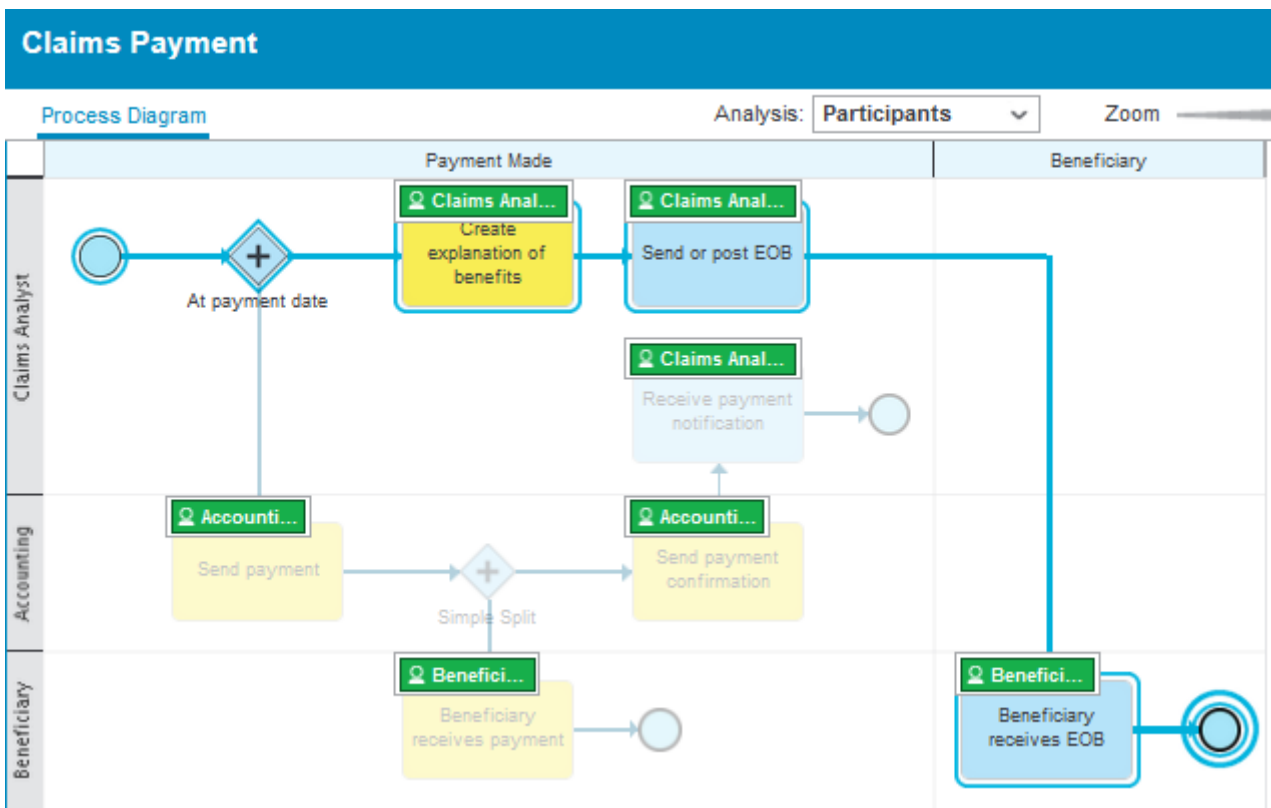


- \_\_\_ 6. Play back path 3.
- \_\_\_ a. Click the **Play** icon.
- \_\_\_ b. Click the **Next** icon one time for each element in the path, beginning with the **Start** event.
- \_\_\_ c. Click the **Next** icon to move to the **At payment date** gateway.
- \_\_\_ d. Click the **Next** icon to move to the **Create explanation of benefits** activity.



- \_\_\_ e. Click the **Next** icon to move to the **Send or post EOB** activity.
- \_\_\_ f. Click the **Next** icon to move to the **Beneficiary receives EOB** activity.

- \_\_\_ g. Click the **Next** icon to move to the **End** event.



- \_\_\_ h. Verify that the playback for path 3 is complete.



**End of exercise**

## Exercise review and wrap-up

In this exercise, a policy is created in the account. The policy is captured in a process and verified. Three playback paths are set up. Each playback path is run to verify that the process diagram is ready for a playback with business process stakeholders.





