

Course Exercises Guide

Business Analysis for Agile BPM Process Transformation

Course code WB825 / ZB825 ERC 2.0



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Exercises description

This course includes the following exercises:

- BPM assessment
- Case study and Blueworks Live setup
- Analyzing a process to create the As-Is process model
- Improving a process
- ISIS and user stories
- Playback Zero

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. If you have sufficient time and want an extra challenge, some exercises might also include optional sections that you can complete.



Important

Online course material updates might exist for this course. To check for updates, see the Instructor wiki at <http://ibm.biz/CloudEduCourses>.

Exercise 1. BPM assessment

Estimated time

00:45

Overview

In this exercise, you assess your knowledge of BPM by describing how you apply BPM concepts to your organization.

Objectives

After completing this exercise, you should be able to:

- Describe BPM and how it can affect an organization
- Describe and define BPM benefits

Introduction

Common characteristics of a process-centric pattern include:

- When operational improvement is the overall goal: improving efficiency, effectiveness through a mix of both structured and ad hoc activities
- When process automation is required, with strong system integration and straight-through processing
- When built-in process visibility, analytics, and optimization are needed
- When scaling process-driven operational improvement from project-to-program, with centralized governance and change control
- When using existing IBM Business Process Manager technology and skills to build line-of-business (LOB) applications

Requirements

None

Exercise instructions

One of the goals of business process management is operational improvement. Your aim is to improve efficiency and effectiveness through a mix of both structured and ad hoc activities in your processes. With strong system integration and straight-through processing, process automation is essential to BPM.

For this exercise, read the following questions and document your answers.

- ___ 1. In your own words, describe business process management (BPM) and its potential benefits to your organization.

- ___ 2. List your organization's operational improvement candidate processes.

- ___ 3. List some of your organization's processes that benefit from process automation.

- ___ 4. List your organization's processes that benefit from visibility, analytics, and optimization.

- ___ 5. Discuss your answers with your peers. How does your list differ from theirs? From a business, cost-benefit perspective, which processes are the best candidates for the initial process improvement effort? Attempt to build consensus for the processes you choose.

End of exercise

Exercise review and wrap-up

This exercise gave you the opportunity to think about the processes in your organization. You identified some processes as candidates for improvement, and narrowed down your choices to the ones that were the best candidates for an initial improvement project.

Exercise 2. Case study and Blueworks Live setup

Estimated time

01:00

Overview

In this exercise, you learn about the predefined case study and start applying some BPM concepts to it. You also set up your Blueworks Live account.

Objectives

After completing this exercise, you should be able to:

- Describe a use case for BPM with relevant current business process analysis
- Identify case study process milestones and activities
- Create a Blueworks Live account

Introduction

This exercise requires you to read through a case study to understand the process you model later in this course. Read the requirements carefully and make sure that you understand the scenario and the organization's process requirements.

The second part of this exercise takes you through setting up a space inside Blueworks Live. You must create an account first, and then prepare your space to model the case study scenario.

Requirements

None

Exercise instructions

Part 1: HR On-boarding process

New Hire On-boarding introduction

In this case study, a company provides call center services to its customers. The company is expecting a huge increase in the volume of calls, so they are hiring 500 call center representatives in a short time frame.

Challenges that are associated with this onboarding process are:

- The onboarding of new call center representatives takes too long (around two months). The company is not able to onboard enough employees in a short time frame and loses business because they are not able to handle the increased number of customer requests.
- In the past, critical steps in the onboarding process were not completed in some cases. An example is when a new call center representative does not start work because the equipment (desktop and phone) was not ordered.
- When the main person in charge is on vacation, that person's replacements make mistakes, and sometimes the work sits idle until the person comes back from vacation. These situations are not surprising, as the process is not documented.
- The onboarding process has no visibility. The work area managers call a number of people to find the status of a new hire.

The company CEO approved the budget to implement this process in IBM Business Process Manager and noted a few process improvement goals:

- Around 500 call center representatives must be onboarded in the required time frame.
- The overall onboarding process must take no longer than one month.
- The company must react to changes in demand quickly.
- The cost of onboarding a new call center representative must be reduced.

The work area managers also have goals in mind:

- Every person understands the documented process. No one should forget any steps in the process.
- Ensure that every role that is involved in the process has at least three people who are assigned to it. Fewer than three people would represent a high risk for a bottleneck. If one person is ill or on vacation, it cannot be allowed to affect the overall duration of the onboarding process.
- The management team must have better insight into the current situation regarding the onboarding of new call center representatives. They need reports that show the status and highlights of critical situations.
- Increase the success rate of new call center representatives who complete the probationary review period successfully without a performance plan.

The people

The company employs a number of people with different roles. This section lists all the roles who are involved directly in the onboarding process. The onboarding process of call center representatives involves only employees of the company (new hires are not included in the process since they are not yet employees of the company).

- **Candidate** is the person who applies for a job at the company. A candidate participates in the interview, undergoes a screening test, and might be offered a job if all requirements are met. If the candidate accepts the job offer, the status of the candidate changes from “candidate” to “new hire”.
- **New Hire** is the candidate who successfully passed the recruiting process and is now working as a call center representative. A new hire must attend orientation and training before they start working as a call center representative. The training helps them to become efficient in a short time. They also go through a probationary review.
- **Recruiter** identifies the potential candidate and also manages the communication with the candidate. They are internal to the company.
- **Hiring Manager** conducts interviews with the candidates, decides whether to hire a candidate, negotiates the salary, and manages the communication with the recruiters.
- **Call Center Manager** activates the new hires profile and plans their work schedule.
- **Human Resources Manager** (HR Manager) The HR Manager receives the new hires profile and routes them to the appropriate human resource administrator (HR Admin) according to the total compensation package.
- **Human Resources Specialist** (HR Specialist) The human resource specialist welcomes new hires in the company and helps them get through the new hire process. The human resource specialist makes sure that the new hires attend the new hire orientation and complete the human resources forms. The human resource administrator orders the new hire equipment.

Typical onboarding process in a company:

- XYZ company New Hire onboarding process: Pre-hire candidate screening, offer letter phase, employee activation, new hire orientation, and new hire work initiation.
- Define the detailed process and model it in Blueworks Live.

HR onboarding process overview: Key facts and steps

- Candidates who are qualified through the interview process and approved for onboarding negotiate the compensation package and start date with the Hiring Manager. Hiring Manager passes on the information to the HR Manager.
- The HR Manager initiates the candidate-screening phase that is required in the onboarding process. The HR Manager assigns an HR Specialist to the task. HR Specialists are required to notify recruiters of the candidate responsibilities during this phase of the process. These requirements involve a drug test screening. HR Specialists are also required to conduct background checks that include resume validation and criminal background investigation.
- Questions come up during the screening phase that need clarification by the candidate in some occasions. HR Managers are responsible to review all screening data and candidate responses to questionable data and decide whether to proceed or not based on all the information.

- If candidates pass the screening phase, HR Managers draft the offer letter and send it to the Hiring Manager for review. HR Managers make adjustments or rejections of changes that the Hiring Manager requested and prepare the final draft of the offer letter for new hire candidates.
- The HR Specialist is responsible to finalize the offer letter phase with the candidate after the final draft is approved. Any clarification that the new hire candidate needs is the responsibility of the HR Specialist to facilitate.
- Acceptance by the new hire candidate initiates the Employee Activation phase of the process. HR Specialist is required to convert the candidate status from “Candidate” to “Employee”. Candidates are required to complete several initial forms before start date for the HR Department records.
- The start date signed off in the offer letter is the day that a new hire is responsible to report into the New Hire orientation class at the company. The HR Department conducts this two-day class, which covers all company policy and benefit information. The new hire completes all policy and benefit forms during this time frame.
- Upon completion of the two-day HR orientation, new hires are given their company badges and informed of their reporting hierarchy.
- The HR Specialist orders the New Hire equipment (desktop and phone).
- New hires begin work by reporting to their respective workgroup Managers on the third day. Managers are responsible to on-ramp new hires on this day, including providing work assignments.

Part 2: Setting up your Blueworks Live account

This part of the exercise covers the creation of a space in an IBM Blueworks Live account. You create a process in the space. To complete this exercise, you must have an active Blueworks Live account. You can sign up for a free 30-day Blueworks Live trial account for this course.

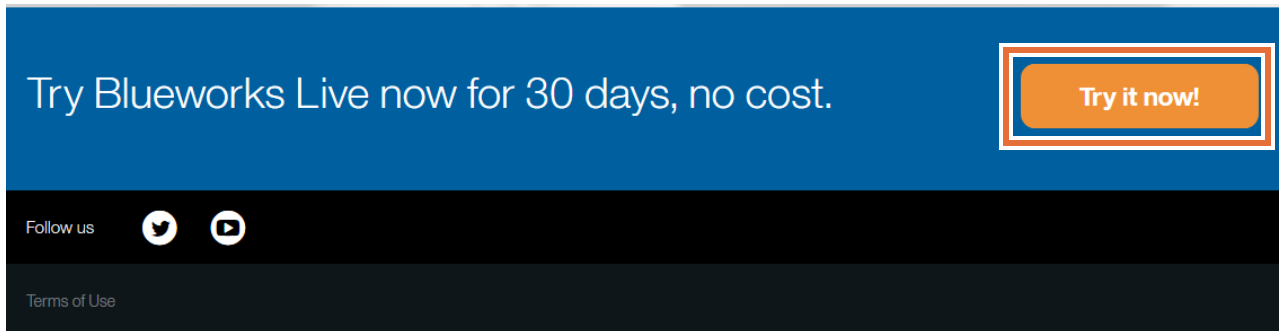


Important

If you do not have an account, open a web browser and enter the following URL:

<https://www.blueworkslive.com/>

Scroll to the bottom of the home page and click **Try it now!** at the bottom.



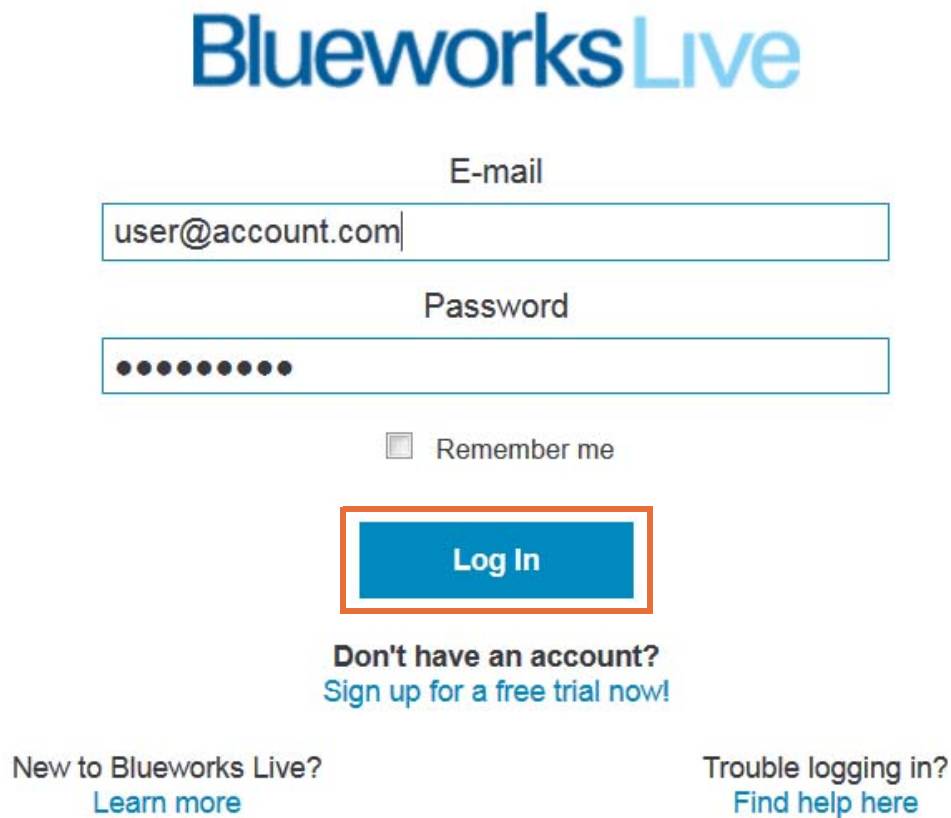
Complete the information to sign up for a 30-day trial. As soon as your account is active, continue to the next section, **Create a space**.

Part 3: Create a space

IBM Blueworks Live provides individual project containers called spaces. Account administrators with the appropriate permissions create and modify spaces, and grant user permissions for the space. A space manager can then create processes, policies, and process applications for the space.

- ___ 1. Log in to Blueworks Live.
 - ___ a. In a web browser, enter the following URL: <https://www.blueworkslive.com/>. Click **Log In** at the top of the page.

- ___ b. Enter the user credentials and click **Log In**.

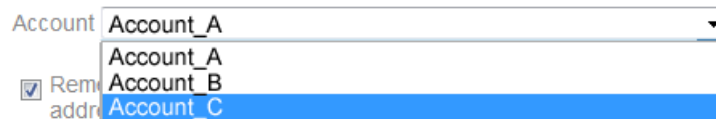


The image shows the Blueworks Live login interface. At the top is the 'BlueworksLive' logo. Below it are two input fields: 'E-mail' containing 'user@account.com' and 'Password' with masked characters. A 'Remember me' checkbox is below the password field. A blue 'Log In' button is highlighted with an orange border. Below the button is a link: 'Don't have an account? Sign up for a free trial now!'. At the bottom are two links: 'New to Blueworks Live? Learn more' and 'Trouble logging in? Find help here'.



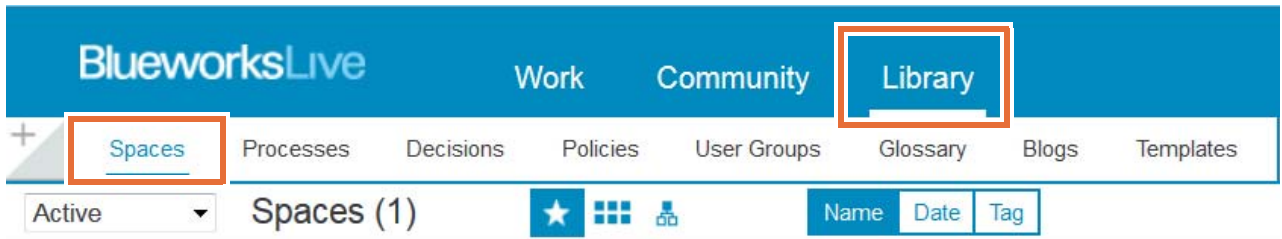
Note

If you have more than one account, then you are prompted to select the account that you want to access after you click **Log In**. Select the account from the **Account** menu and then click **Log In** again.

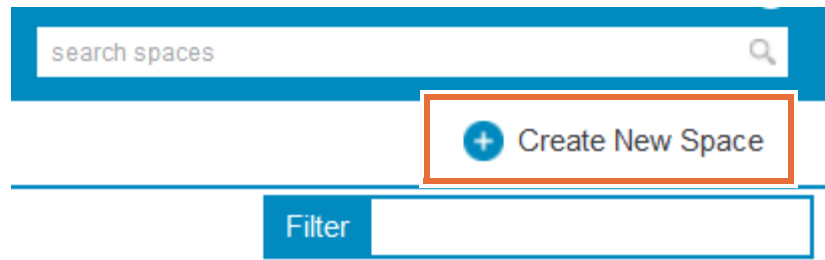


The image shows a dropdown menu for account selection. The label 'Account' is to the left of the dropdown. The dropdown list contains four items: 'Account_A', 'Account_A', 'Account_B', and 'Account_C'. The 'Account_C' item is highlighted in blue. To the left of the dropdown, there is a checked checkbox labeled 'Remember address'.

- ___ 2. Create a space in the IBM Blueworks Live account space repository.
- ___ a. Click the **Library** tab at the top of the Blueworks Live home page, and then click the **Spaces** tab on the left side of the row of section tabs.



- ___ b. On the right side of the page, click the plus sign (+) to create a new space.



- ___ c. Enter the name of the new space: New Space followed by your initials. Select **Top of library** for the setting: **Where to add this new space**. 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

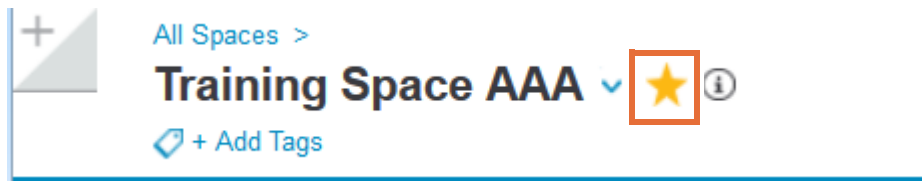
Create Space

Part 4: Modify the space information

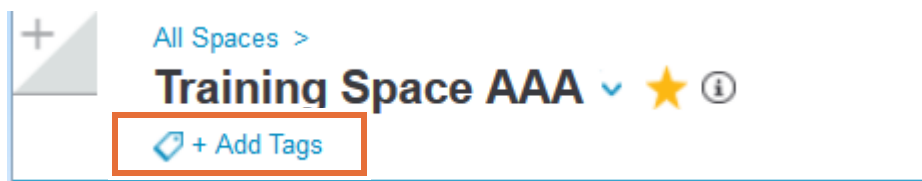
- ___ 1. Change the space name.
 - ___ a. The *New Space* page is created. Click the name of the space to highlight the area.
 - ___ b. Change the name of the space to *Training Space* and your initials.



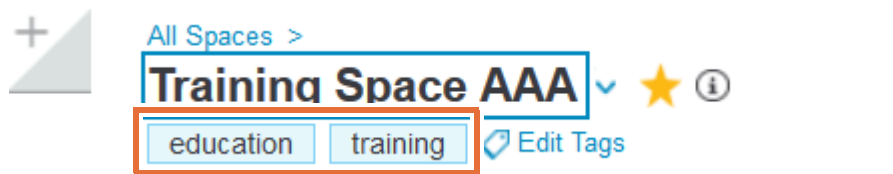
- ___ 2. Make the space part of the **I'm Following** space repository.
 - ___ a. Click the star next to the space name. Verify that the star changed color to signify that the space is now part of the **I'm Following** spaces.



- ___ 3. Add tags to the space.
 - ___ a. Click **+ Add Tags** below the space name.

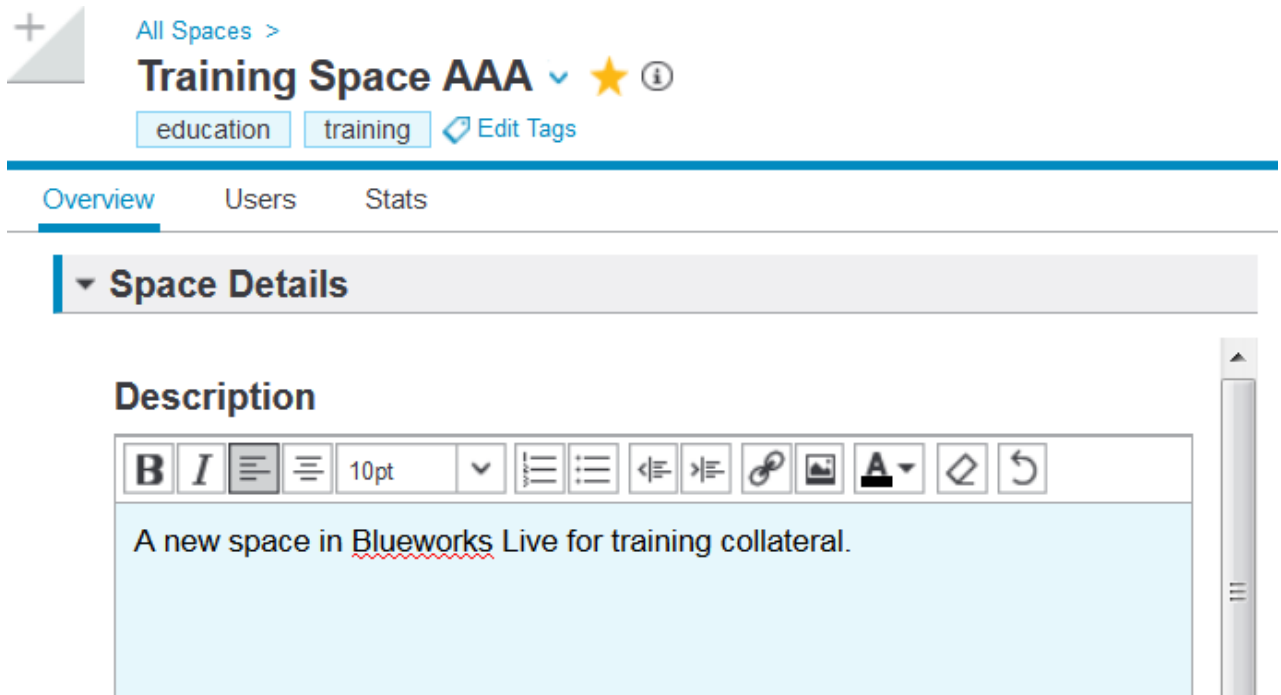


- ___ b. Type *education* followed by a comma.
- ___ c. Type *training* in the next entry box and press the **Enter** key on the keyboard to finish adding tags.



- ___ 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 unless it is already expanded, and click the **Description** area to access the editor.
- ___ c. Type the following description: A new space in Blueworks Live for training collateral.



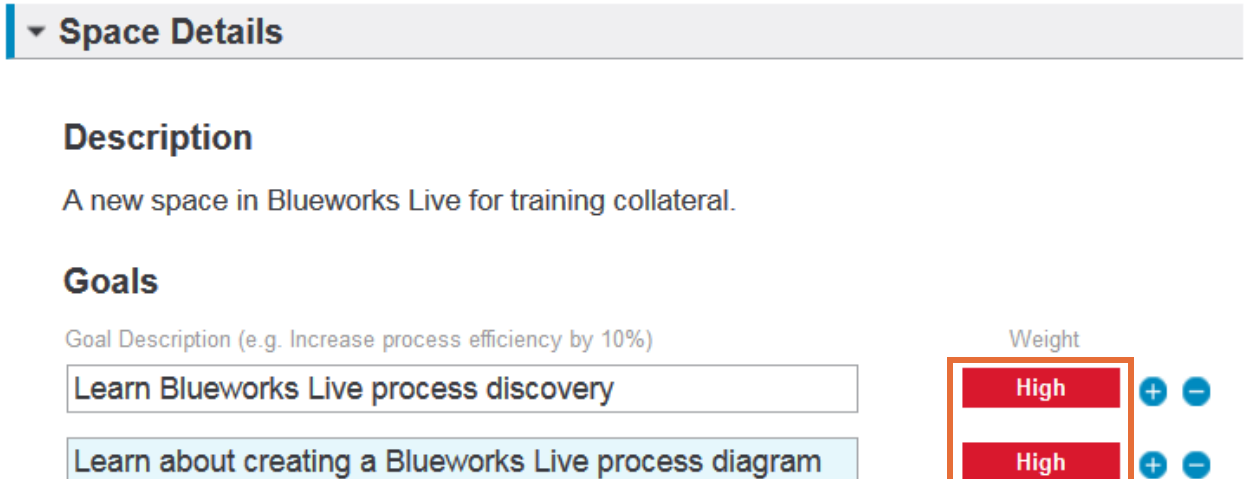
Training Space AAA education training [Edit Tags](#)

Space Details

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 **Goal** entry box.
 - ___ b. Enter the following goal: Learn Blueworks Live process discovery
 - ___ c. Press **Enter** to add another goal below the current goal.
 - ___ d. In the next entry box, type the next goal: Learn about creating a Blueworks Live process diagram
 - ___ e. Click the Weight buttons to the right of the entries until both are set to **High**.



Space Details

Description

A new space in Blueworks Live for training collateral.

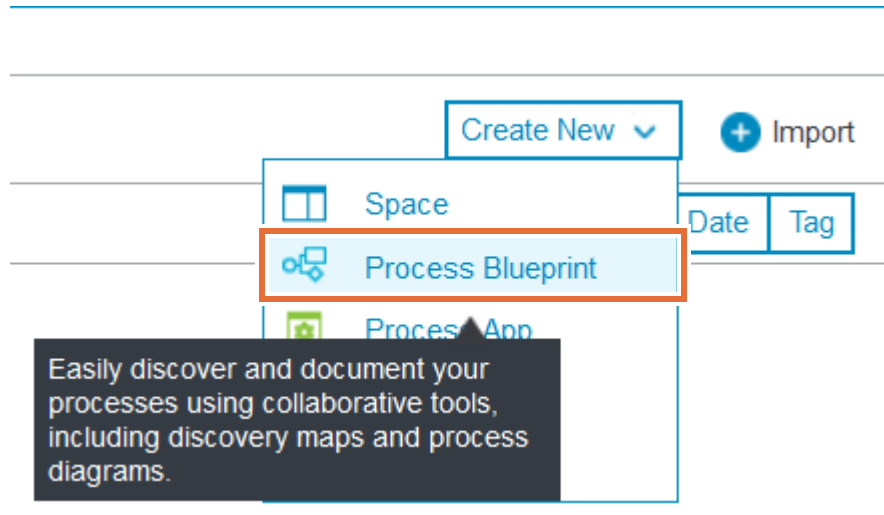
Goals

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

Learn Blueworks Live process discovery	High
Learn about creating a Blueworks Live process diagram	High

Part 5: Create a process

- ___ 1. Create a process blueprint.
 - ___ a. Expand the **Create New** menu on the right side of the space interface.
 - ___ b. Select **Process Blueprint** from the menu options.



- ___ c. Type the name of the new process in the dialog entry field: New Hire On-boarding
- ___ d. Click **Create**.

 A screenshot of the 'Blueprint a Process' dialog box. The dialog has a blue header with the title 'Blueprint a Process' and a close button (X). The main content area is white. It contains the text: '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 text is a section titled 'Process Name' with a text input field containing 'New Hire On-boarding'. Below the input field is a help icon and the text: 'By default, you will automatically follow all processes you create. You can change this in your user settings panel.' At the bottom of the dialog, there is a line of text: 'Select **Create** to start blueprinting your process.' and a blue 'Create' button, which is highlighted with an orange border.

- ___ 2. Modify the process information.
 - ___ a. Click the **Add Tags** option at the top of the process discovery map.

- ___ b. Type `hr department` in the entry field. Click outside of the box to save the setting.

- ___ c. Verify that the star next to the process name is highlighted to ensure that it is a process in the **I'm Following** repository.



Note

IBM Education also offers course number WB031 / ZB031. The course provides more in-depth training on Blueworks Live than this course. This course teaches you how to model a process, with an emphasis on teaching analyst skills in working along with the tool.

End of exercise

Exercise review and wrap-up

In the first part of the exercise, you read through the HR On-boarding process. Although you might not understand the process fully, this case study sets the foundation for the rest of the course. You use this case study to create a process later on in the course. If you need to become more familiar with the scenario, reread this part of the exercise.

The second part of the exercise takes you through creating the space inside Blueworks Live for the rest of the exercises in this course. If you have any difficulty in setting up your account or in creating your space, contact your instructor or the Education support team.

Exercise 3. Analyzing a process to create the As-Is process model

Estimated time

02:30

Overview

In this exercise, you analyze a process to create the As-Is process model.

Objectives

After completing this exercise, you should be able to:

- Identify an organization's challenges
- Document business requirements
- Create the As-Is process model

Introduction

BPM analysts and process owners typically collaborate on the discovery map in IBM Blueworks Live. The goal is to capture the current state of the business process. At times, details such as process bottlenecks and trouble spots are discussed, but not solved. The ideal for a discovery map is a “just the facts” diagram of the business process.

A process diagram in IBM Blueworks Live is the BPMN equivalent of a process model, or business process definition (BPD) in Business Process Manager. The BPMN elements in IBM Blueworks Live have some limitations. These limitations are based on the goal of the tool: communicate the process model as the “As-Is” and then the “To-Be” process diagram. The ideal is to create a model that defines the business and functional requirements for implementation.

Requirements

This exercise requires an active IBM Blueworks Live account.

Exercise instructions

Preface

This exercise covers the creation of a discovery map in a process. Typically, an analyst creates the final discovery map through a series of collaborative sessions with the process owners. For this exercise, the process narrative is used to provide the information that is needed to complete the discovery map. To accomplish completing this exercise, the student must have an active Blueworks Live account.



Note

If you are not logged in to Blueworks Live, follow the same procedure as mentioned in Exercise 2 to log in to Blueworks Live. To access the process, you must first find the Training Space. Go to the **Library > Spaces** tab and open your **Training Space**.

Part 1: Add milestones to the discovery map

The first part of this exercise requires you to identify the activities that are part of the scenario. If you are familiar with the tools, consider completing the major numbered steps, but skip over the lettered steps. In this way, you complete the requirements without having to follow the detailed steps that are listed in this exercise guide.



Note

Remember, modeling is an art and not a science. Multiple right answers can be there, and what matters is whether the model is justifiable, accurate, and you can gain consensus with others on the model. If you follow the steps exactly as shown, the result is only one example of a model that might differ from someone else's interpretation of the requirements. This exercise is a realistic outcome of modeling processes inside your organization.

Students who are familiar with the tools and want more of a challenge can do the numbered steps and try to figure out the substeps that are required to complete the objectives.

- ___ 1. Read the On-boarding process narrative in Exercise 2 and insert the milestones on the discovery map.
 - ___ a. Open the New Hire On-boarding process unless it is already open.

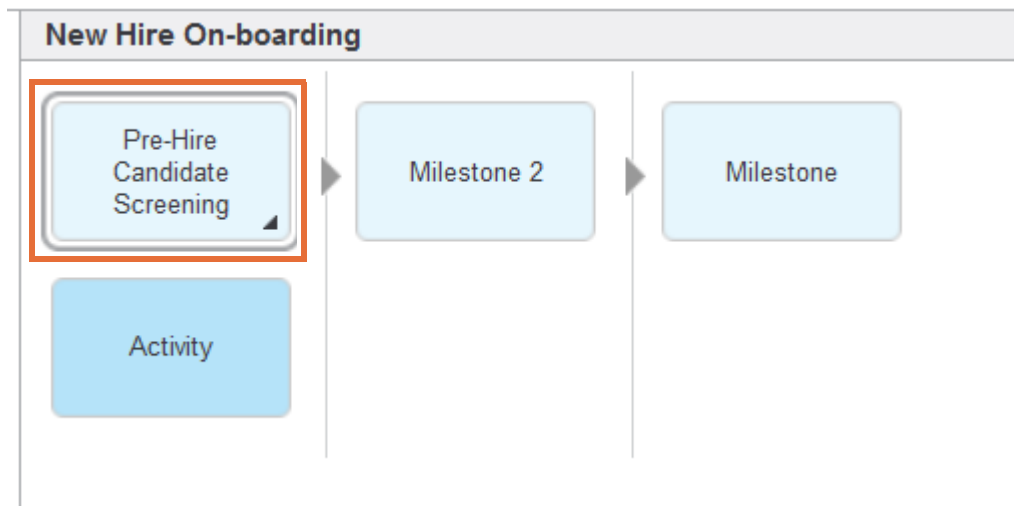
- ___ b. Click one time on Milestone 2 to highlight it on the discovery map on the right. Click **(+)** **Add Milestone** one time to add one more milestone to the discovery map.



Note

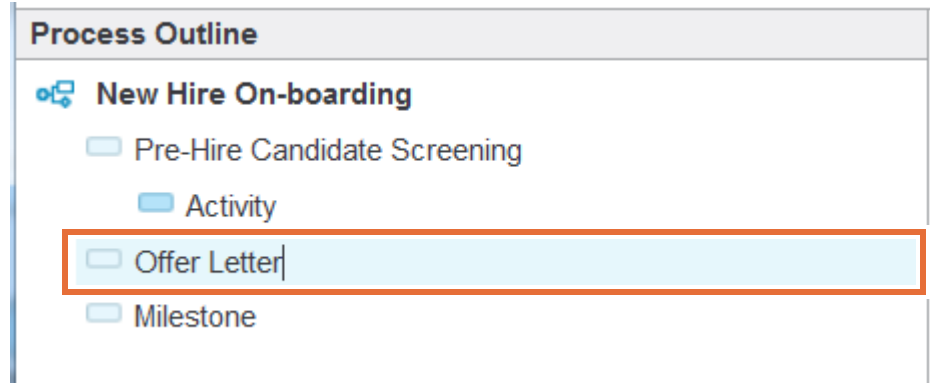
A milestone can be added anywhere in the discovery map. Click, hold, and drag the milestones to move them. It is not a problem at this stage of descriptive modeling, but it is important to note this method for later milestone changes if necessary.

- ___ 2. Rename the milestones.
- ___ a. Click the **Milestone 1** activity on the right one time to highlight the text in blue.
- ___ b. Type the new label for the milestone: Pre-Hire Candidate Screening



- ___ c. In the Process Outline section on the left, drag the cursor over the **Milestone 2** label to highlight the text in blue.

- ___ d. Type in the new milestone label: Offer Letter



Note

Changing the label for an activity changes it in both the left and right sections. You can rename activities on the left or right in the discovery map.

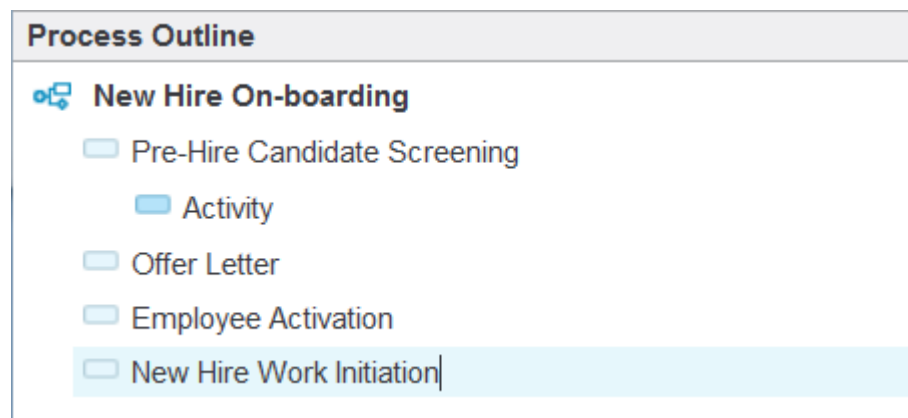
- ___ e. Change the next milestone label to: Employee Activation



Hint

You can press the **Enter** key on your keyboard to add a milestone to the discovery map after the current one you are working on. To delete a milestone, press **Shift + Delete** on your keyboard.

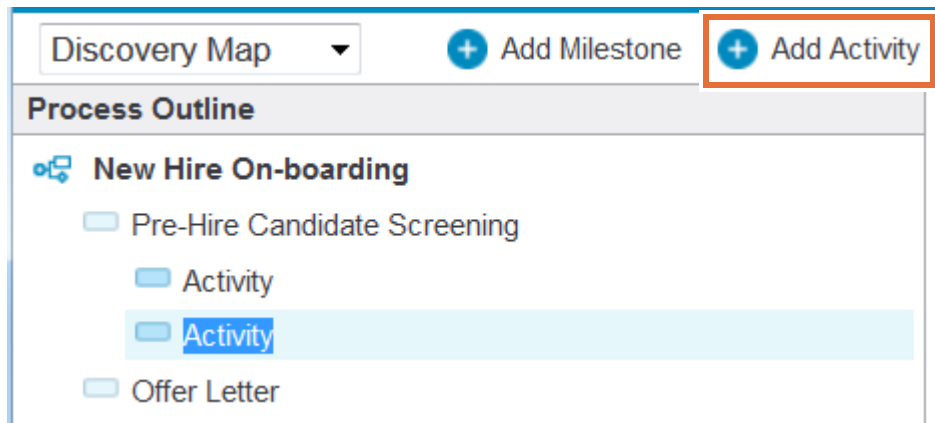
- ___ f. Add one more milestone and name it: New Hire Work Initiation



Part 2: Add all “As-Is” process activities to the discovery map

- ___ 1. Add the activities to the first milestone.
- ___ a. On the left side of the page, click one time on the **Activity** under the Pre-Hire Candidate Screening milestone.

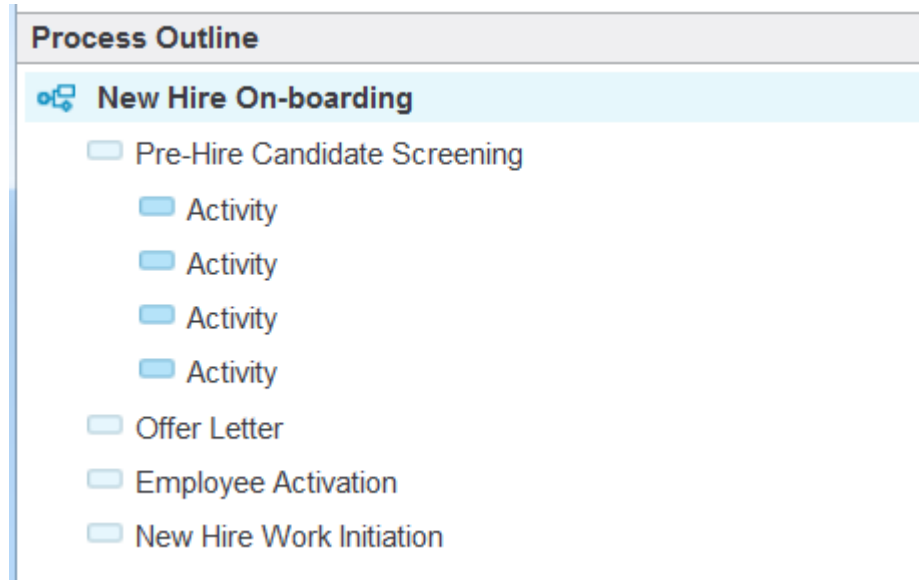
- ___ b. Click **(+) Add Activity** to add an activity under the Pre-Hire Candidate Screening milestone.



Hint

You can also add activities by pressing the **Enter** key on your keyboard when an activity is selected on either the left or the right side of the screen. To delete an activity, press **Shift + Delete** on your keyboard.

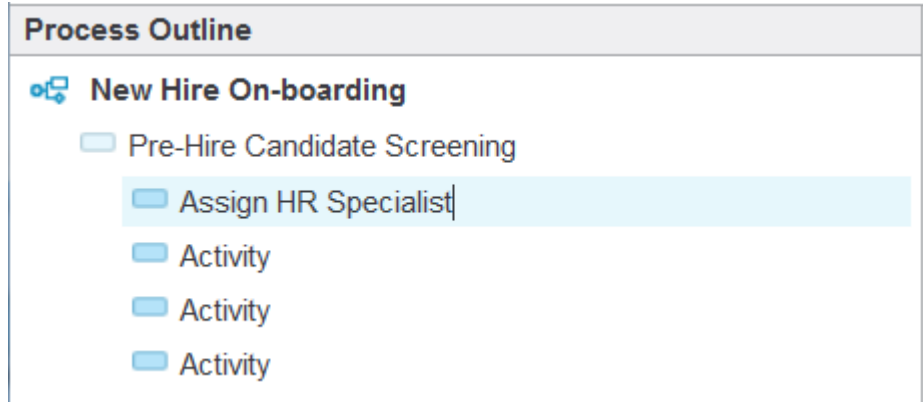
- ___ c. Create a total of four activities under the **Pre-Hire Candidate Screening** milestone.



- ___ 2. Rename the activities.

- ___ a. Click one time on the first activity label in the discovery map on the left.

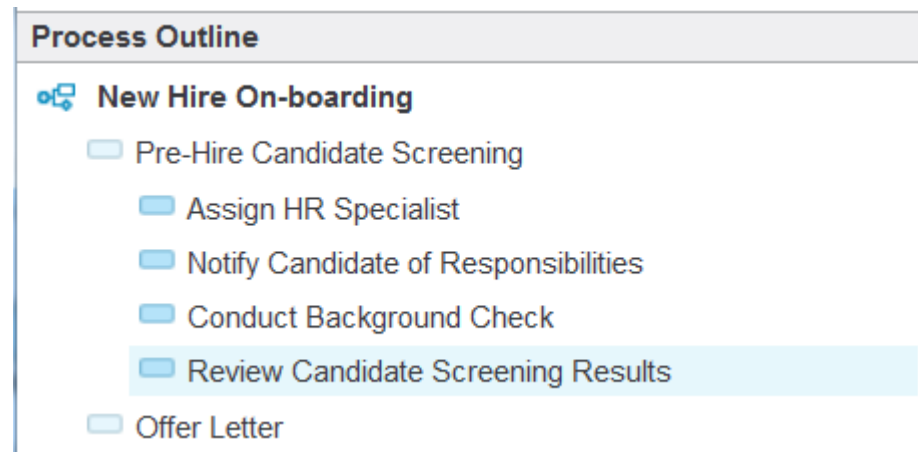
- ___ b. Rename the activity: Assign HR Specialist



Reminder

You can rename activities in either the left or the right side of the Discovery Map.

- ___ c. Rename the second activity: Notify Candidate of Responsibilities
- ___ d. Rename the third activity: Conduct Background Check
- ___ e. Rename the fourth activity: Review Candidate Screening Results



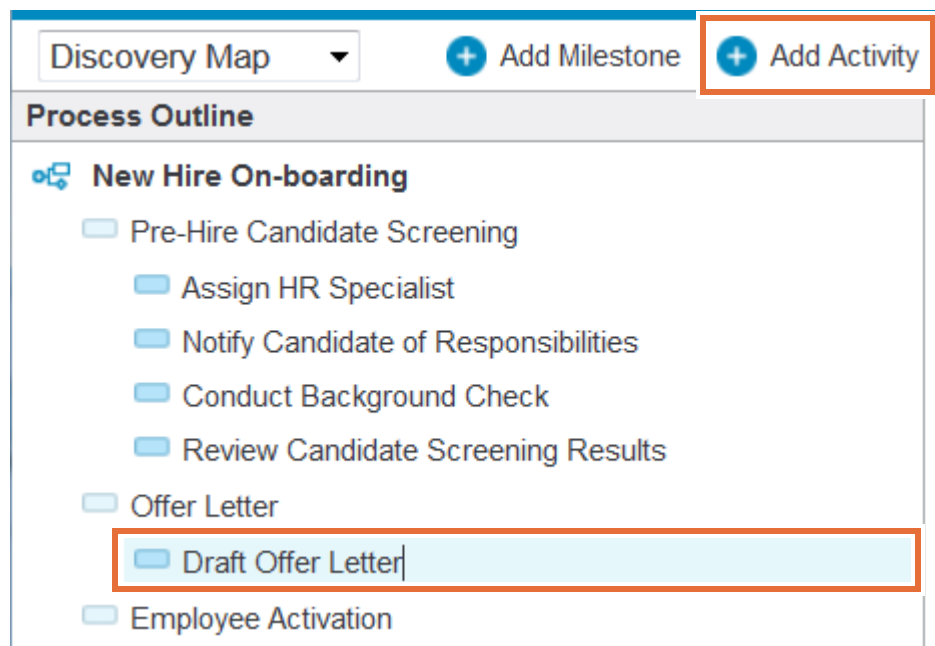
- ___ 3. Create the Offer Letter milestone activities.



Information

In part 2.1, you added all the activities in the beginning and then went through the generic activities and renamed them all. Although this procedure gives you practice in creating activities and renaming them, it is not realistic when creating your discovery map. This time, add a single activity, rename it, and then continue creating the activities one at a time. This approach is more realistic because you most likely do not know how many total activities to create under each milestone when you start modeling. Adding the milestones one by one also gives you the flexibility to add or subtract activities as needed while you are discussing the As-Is process.

- ___ a. Click the **Offer Letter** milestone and create an activity under it named: Draft Offer Letter



Reminder

Click **(+) Add Activity** to create activities for the selected milestone. Rename the activity, and press the **Enter** key to add the next milestone. By using this process, you can add activities to milestones quickly.

- ___ b. Create a second activity that is named: Review Offer Letter
- ___ c. Create another activity that is named: Approve Offer Letter
- ___ d. Create another activity that is named: Finalize Offer Letter
- ___ e. Create another activity that is named: Distribute Offer Letter
- ___ f. Create another activity that is named: Clarify Offer Letter

___ g. Create a final activity that is named: Accept Offer Letter

- ☐ Offer Letter
 - ☐ Draft Offer Letter
 - ☐ Review Offer Letter
 - ☐ Approve Offer Letter
 - ☐ Finalize Offer Letter
 - ☐ Distribute Offer Letter
 - ☐ Clarify Offer Letter
 - ☒ Accept Offer Letter

___ 4. Add the Employee Activation milestone activities.

- ___ a. Add an activity that is named: Change Candidate to Employee
- ___ b. Add an activity that is named: Fill out HR Forms

- ☐ Employee Activation
 - ☐ Change Candidate to Employee
 - ☒ Fill out HR Forms
- ☐ New Hire Work Initiation

___ 5. Add the activities to the final milestone, New Hire Work Initiation.

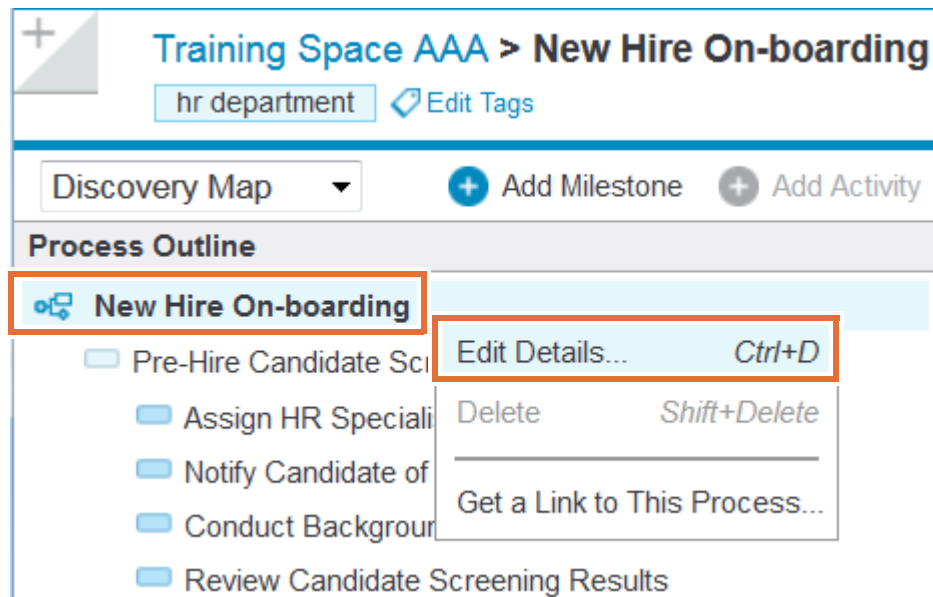
- ___ a. Add an activity that is named: Attend New Hire Orientation
- ___ b. Add an activity that is named: Complete Policy & Benefits Forms
- ___ c. Add an activity that is named: Provide Company Badge
- ___ d. Add an activity that is named: On-Ramp New Hire
- ___ e. Add an activity that is named: Provide Work Assignments

- ☐ New Hire Work Initiation
 - ☐ Attend New Hire Orientation
 - ☐ Complete Policy & Benefits Forms
 - ☐ Provide Company Badge
 - ☐ On-Ramp New Hire
 - ☒ Provide Work Assignments

The initial discovery map for the New Hire On-boarding process is complete. Now it is time to add some details to the discovery map to enable the transition to a process diagram.

Part 3: Adding details to the discovery map

- ___ 1. Add a brief description of the process in the discovery map.
 - ___ a. Right-click the **New Hire On-boarding** title in the process outline window on the left. Click **Edit Details**.



- ___ b. Click the **Documentation** tab. Click the blank area to access the text editor. Copy and paste, or type the following process overview in the editor:
- **Process Overview:** The process for hiring and onboarding new call center employees is manual and is not documented. For the call center of the company, it is important to make the hiring of new call center representatives as efficient as possible and to get the new employees productive in a short time. Because hiring and onboarding new people is a core part of a call center company, the improvement of this core process results in a direct improvement of the overall value chain.
 - **Process Start (Trigger):** This process is initiated directly from the recruiting process.
 - **Process Ends:** This process ends after the probationary review unless problems exist. If problems exist, then the process ends after the performance plan is created.

New Hire On-boarding

Details
Problems
Policies
Documentation
Attachments
Comments

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▼

Process Overview

The process for hiring and on-boarding new call center employees is currently manual and is not documented. For the call center of the company, it is important to make the hiring of new call center representatives as efficient as possible and to get the new employees productive in a short time. Because hiring and on-boarding new people is a core part of a call center company, the improvement of this core process results in a direct improvement of the overall value chain.

Process Start (Trigger)

This process is initiated directly from the Recruiting Process.

Process Ends

This process ends after the probationary review if there are no problems. If problems exist, then the process ends after the performance plan is created.

- ___ c. Click the **Details** tab. Scroll down to the **Inputs** entry and type: Open Position
In the **Outputs** entry, type: Filled Position

New Hire On-boarding

Details Problems Policies Documentation Attachments Comments

▼ **Inputs** ?

Open Position

▼ **Outputs** ?

Filled Position

▼ **Customers** ?

- ___ d. Click the blue **X** circle on the right side to close the dialog box.



Important

The system automatically saves any changes that you make, so you do not need to worry about clicking a Save button or applying a keyboard shortcut to ensure that your changes are saved.

- ___ 2. Add details to the discovery map milestones.
- ___ a. Right-click the **Pre-Hire Candidate Screening** milestone and click the **Edit Details...** option from the menu.
- ___ b. Scroll down to the **Inputs** entry and type: Initial Hire Decision
In the **Outputs** entry, type: Background Check Forms

Pre-Hire Candidate Screening ☆

Details Problems Policies Documentation Attachments Comments

▼ **Inputs** ?

Initial Hire Decision

▼ **Outputs** ?

Background Check Forms

▼ **Customers** ?

- ___ c. Close the dialog box.
- ___ 3. Add details to the discovery map activities in the first milestone.

**Note**

For purposes of this exercise, the only detail to concern yourself with is the participant role for each activity. Participants are the human or system roles that complete each process task.

- ___ a. Right-click the **Assign HR Specialist** activity under the first milestone.
- ___ b. In the **Details > Participant** entry, type: HR Manager
- ___ c. Right-click the **Notify Candidate of Responsibilities** activity under the first milestone.
- ___ d. In the **Details > Participant** entry, type: HR Specialist
- ___ e. Right-click the **Conduct Background Check** activity under the first milestone.
- ___ f. In the **Details > Participant** entry, type: HR Specialist
- ___ g. Right-click the **Review Candidate Screening Results** activity under the first milestone.
- ___ h. In the **Details > Participant** entry, type: HR Manager
- ___ i. Use the following table to map the rest of the participants to the activity on the discovery map.

Activity	Participant
Draft Offer Letter	HR Manager
Review Offer Letter	Hiring Manager
Approve Offer Letter	Hiring Manager
Finalize Offer Letter	HR Specialist
Distribute Offer Letter	HR Specialist
Clarify Offer Letter	HR Specialist
Accept Offer Letter	New Hire
Change Candidate to Employee	HR Specialist
Fill out HR Forms	New Hire
Attend New Hire Orientation	New Hire
Complete Policy & Benefits Forms	New Hire
Provide Company Badge	HR Specialist
On-Ramp New Hire	Hiring Manager
Provide Work Assignments	Hiring Manager

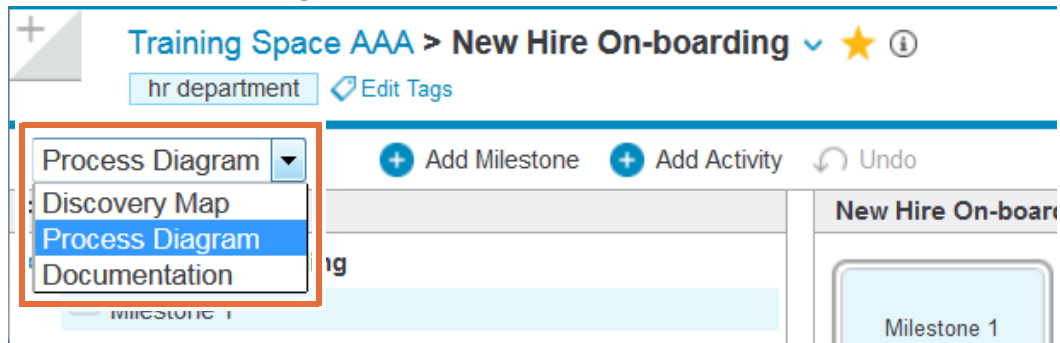
**Important**

At this stage, the goal is to capture current activities and data. Process optimization or technical implementation details should never be considered during the As-Is process model. The model changes during the next stage and throughout the process model lifecycle. The goal is now to create a model that reflects the current state of the process and nothing more.

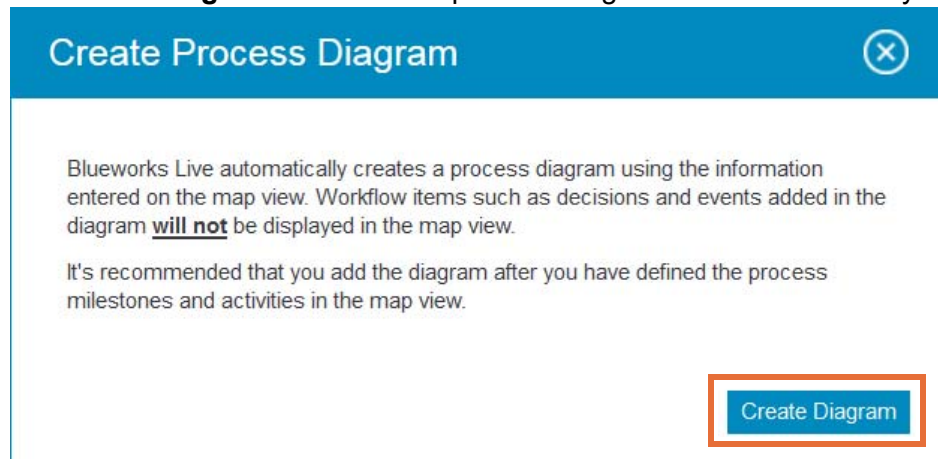
Part 4: Create a process diagram

This part of the exercise covers the creation of a process diagram in a process. The process diagram is an extension of the discovery map so a BPM team does not have to start the development effort from the beginning. Next, you continue to use the process narrative to create and modify the process diagram.

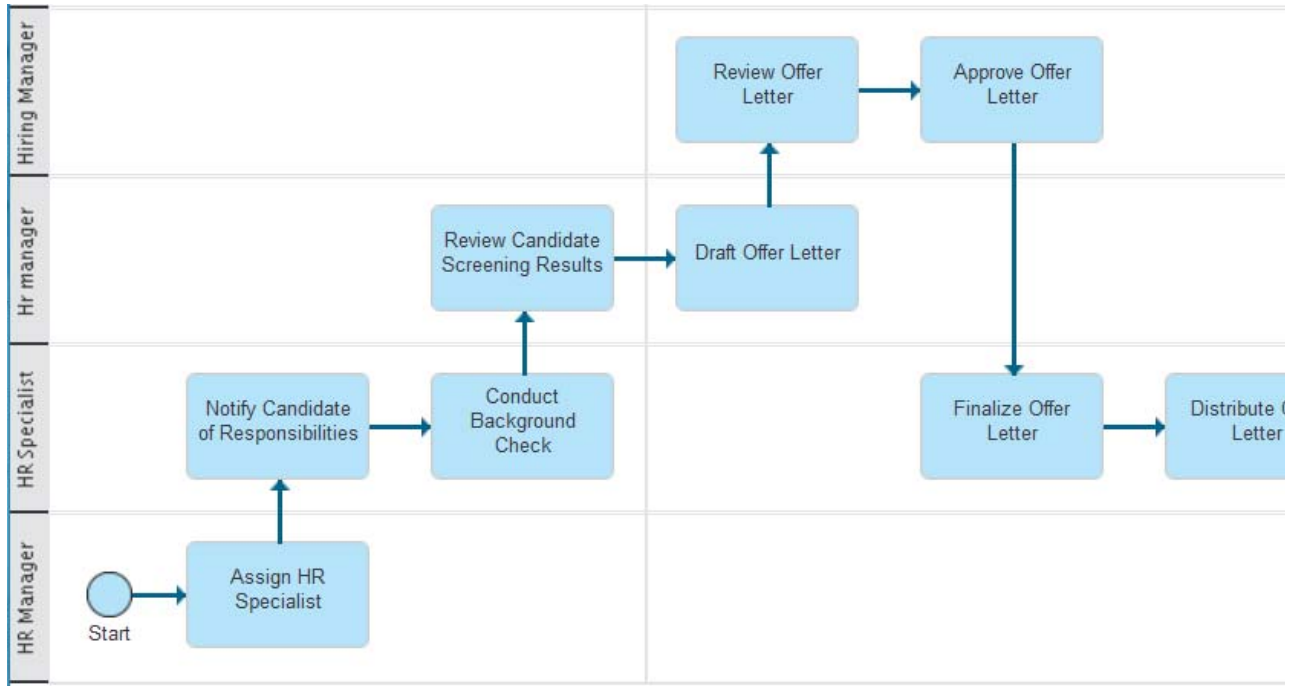
- ___ 1. Create the initial process diagram.
 - ___ a. Open the select menu in the upper left of the New Hire On-boarding process interface. Select **Process Diagram** from the menu options.



- ___ b. Click **Create Diagram** to create the process diagram from the discovery map.



c. The process diagram is created and ready for modification.



Important

The system might change the spelling of the participants when you create the activity details, as shown in this image. Because other people are in the environment who have participants with similar spelling, the system autocompletes the participant label sometimes. The changed spelling causes activities for the same participant to be in separate lanes because the Participant labels are not the exact same. You change the process diagram in the next steps to correct this problem.

Part 5: Modify the process diagram



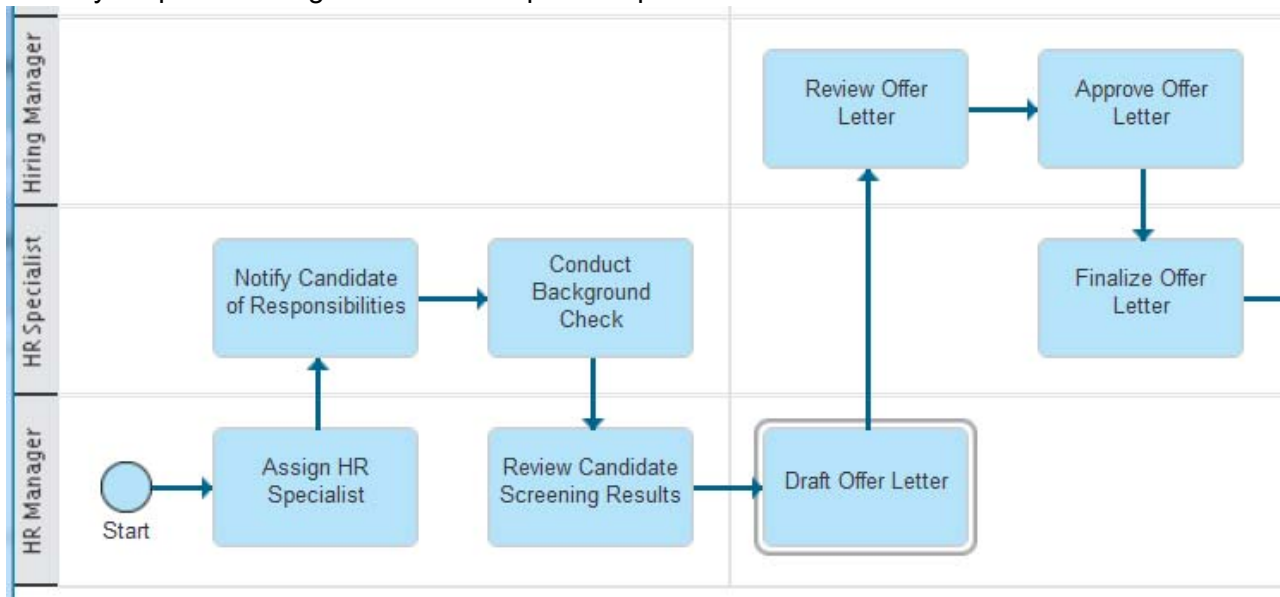
Note

Often times, the initial process diagram that IBM Blueworks Live creates, needs adjustment. Therefore, it is important to modify the process diagram after it is created from the discovery map. The process diagram modification typically requires several element changes. However, changes that are needed in your process diagram might vary. Some or all of what is covered in this section needs to be done to make sure that the process diagram reflects a completed “As-Is” process diagram.



Optional

Your process might differ from the one shown previously, depending on whether the system auto-completed your lane names. In this screen capture, you see two HR Manager lanes, one with lowercase letters (Hr Manager). The activities in the two lanes must be consolidated into a single lane. You can drag activities from one lane to another, and the system updates the participant in the activity details. Right-click any lane to delete it as soon as the lane is empty. Change your model so that your process diagram is correct up to this point.

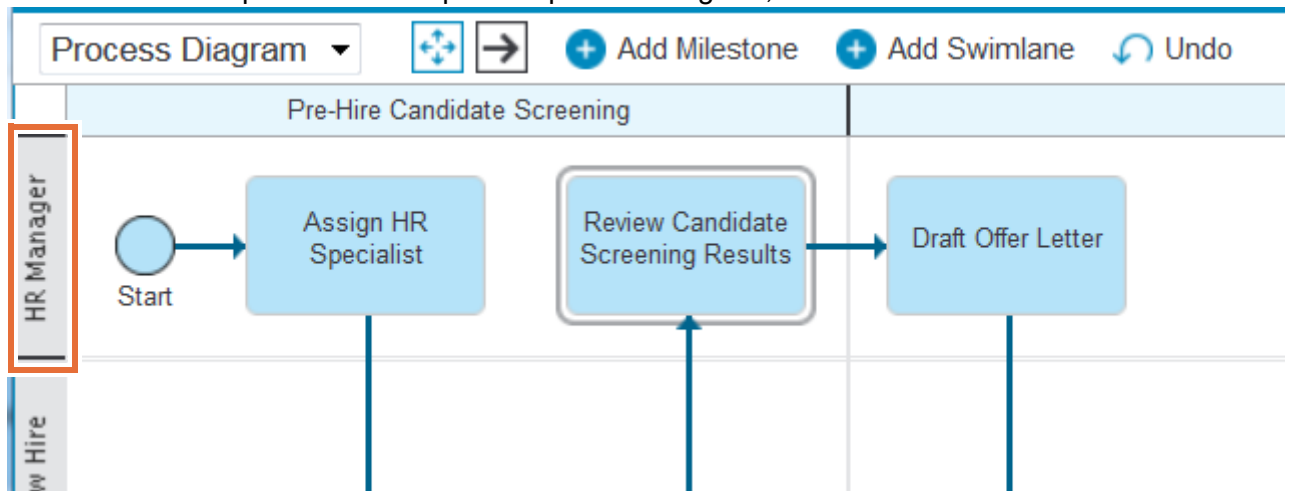


- ___ 1. Move the lanes in the process diagram.

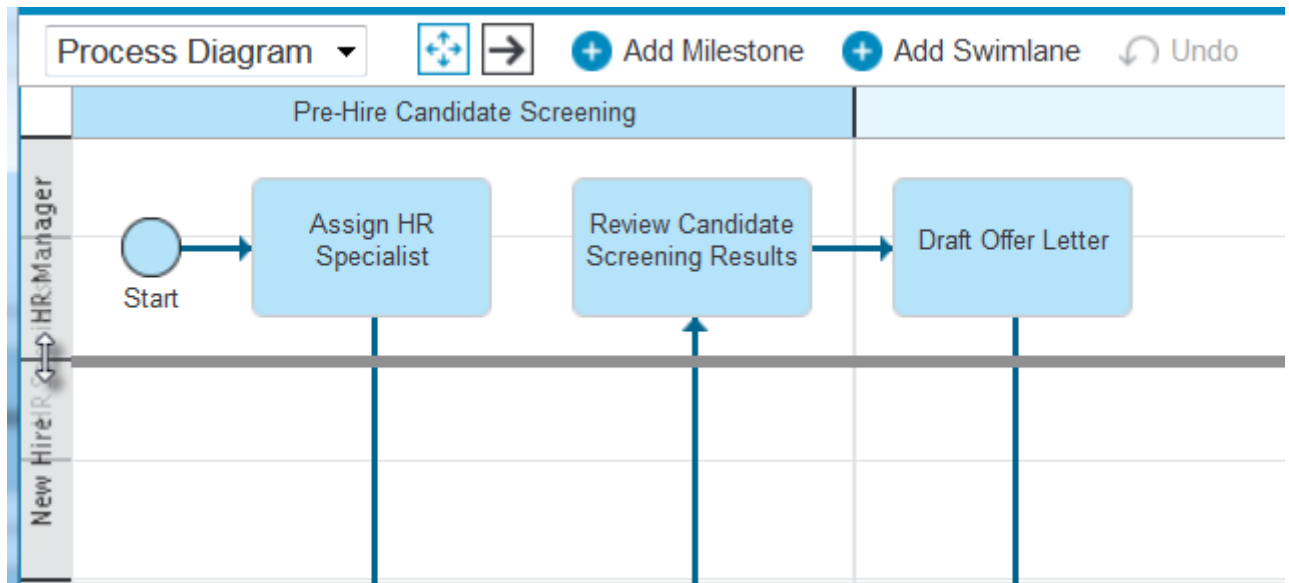
Process diagrams communicate the process flow best when the tasks and participants are read from top to bottom and left to right. Try to implement this general rule whenever possible, but this rule cannot be strictly enforced. Do your best to start in the upper left and

end in the lower right. This arrangement requires a change to the location of the lanes on the process diagram.

- ___ a. Holding down the mouse button on the **HR Manager** lane label on the left, drag the lane to the top of the process diagram. When you see a dark line that indicates where the lane is placed at the top of the process diagram, release the mouse button.



- __ b. Drag the **HR Specialist** lane below the HR Manager lane.

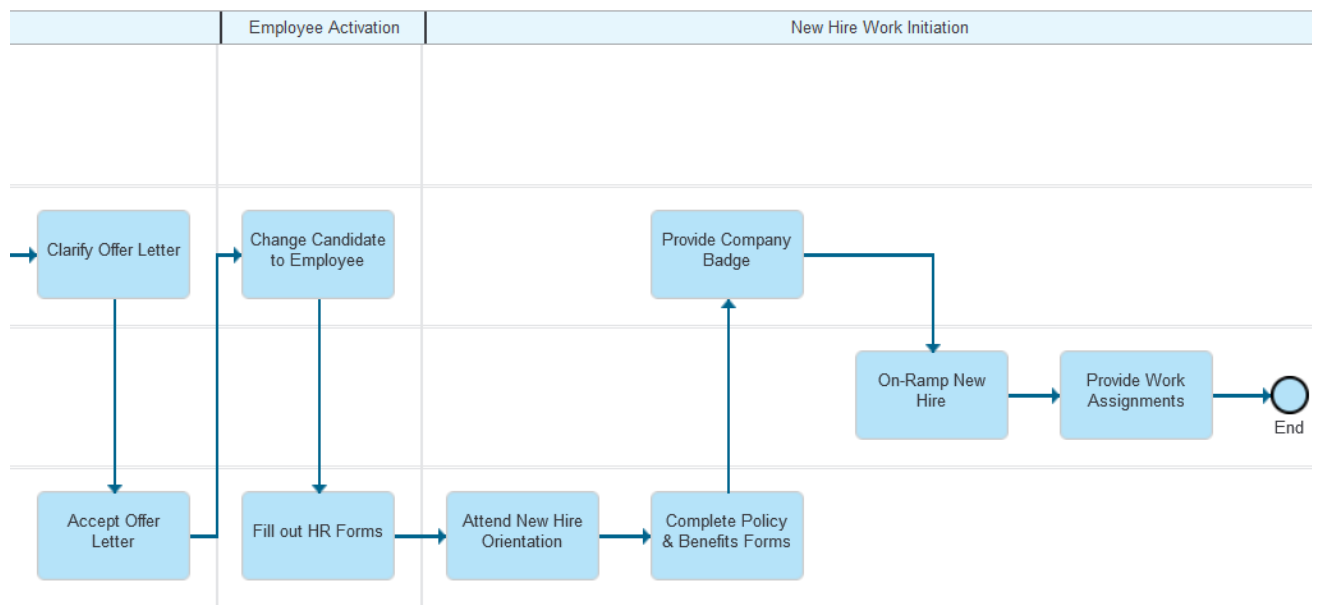
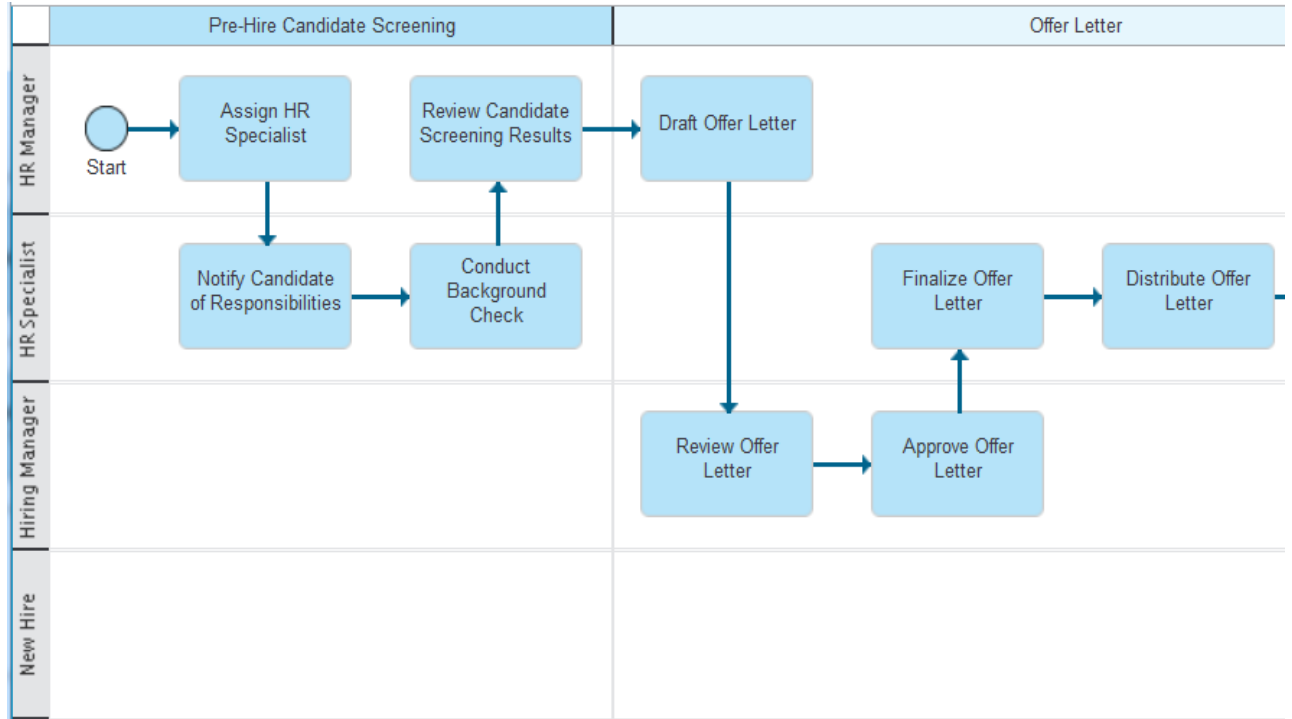


- __ c. Move the **Hiring Manager** lane above the New Hire lane.



Information

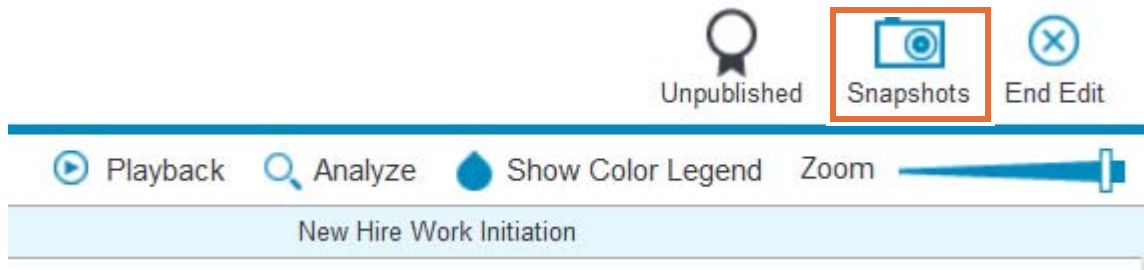
This step completes the relocation of the lanes to communicate a top-down and left-right reading process diagram. Because some of the flow bounces between the different lanes, aim for readability and be flexible when ordering your lanes.



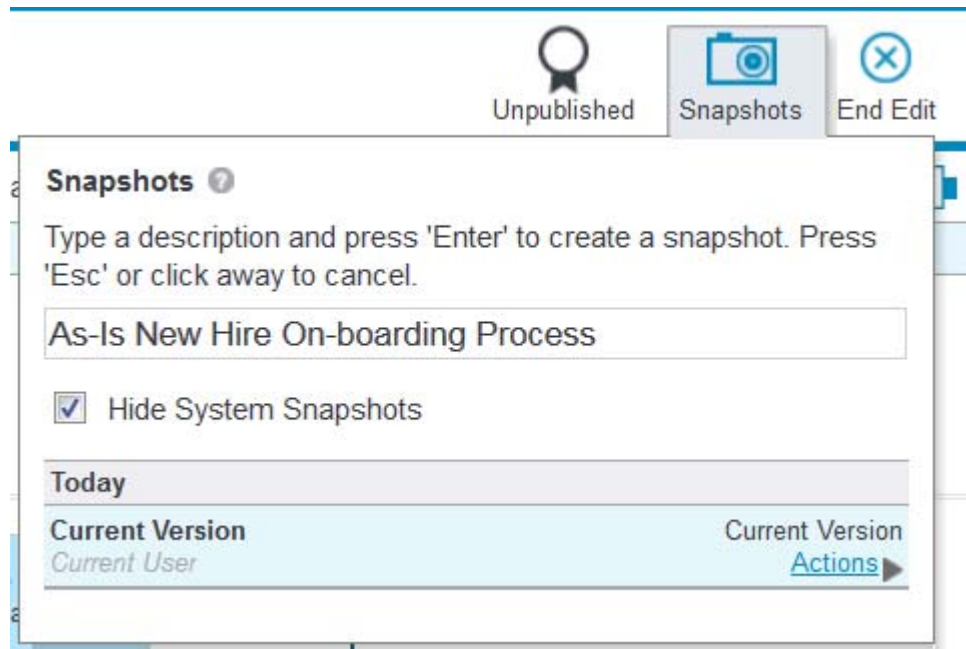
Part 6: Create a snapshot of the As-Is process model

After the creation of the initial “As-Is” process diagram, a BPM author creates a snapshot of the model. A snapshot is a current state of development view that can be referenced at any time. You can view the process in the prior state, and can revert any changes that you made since any previous snapshot.

- ___ 1. Create the snapshot of the “As-Is” process diagram.
 - ___ a. Click the **Snapshots** button on the function menu bar at the upper right of the process diagram interface.



- ___ b. Add the name of the snapshot: As-Is New Hire On-boarding Process
Press the **Enter** key to create the snapshot.



- ___ c. The new snapshot is added to the list. Press the **ESC** key or click anywhere outside the **Revision History** box to close the menu.

Exercise review and wrap-up

The first part of the exercise was about creating a process diagram from the discovery map in the New Hire On-boarding process. The process diagram was then modified to meet process narrative requirements. This initial state captures the activities of the process, but further analysis for optimization and to eliminate process inefficiencies must be taken to create the To-Be process.

Exercise 4. Improving a process

Estimated time

02:00

Overview

In this exercise, you improve a business process and create the To-Be business process.

Objectives

After completing this exercise, you should be able to:

- Create the To-Be business process

Introduction

Part of process improvement is to add process details to the elements of the process. The BPM team can then better analyze the process for improvement. As the analysis is completed, the details are refined. Those final details become the functional requirements for model implementation.

The value-add analysis focuses on tagging each task in the process so decisions can be made to improve the process.

Requirements

Completion of all the prior exercises.

Exercise instructions

Preface

This exercise covers the capture of process details and modifying the process diagram to meet your process goals. The rework loop needs to be included, also known as alternate paths to the most direct path to end. This path is usually the most desirable path for the process to follow, and is referred to as the happy path or the expected path. Also, some subprocesses need to be added to reflect the task that is done for some of the activities. These subprocesses communicate who should perform the task and what details need to be added to the model.

Similar to the last exercise, if you feel comfortable with the tools, consider doing the numbered steps as they relate to your process. By creating your own To-Be process, you can compare your final product with this exercise. Compare your final product with others in the class unless you are using a self-paced virtual course. Even though two people might not have the same To-Be process at the end of the exercise, use this opportunity to discuss and build consensus around your modeling decisions. Consensus on the To-Be process is critical for success in all organizations.



Note

If you are not logged in to Blueworks Live, follow the same procedure as noted in Exercise 2 to log in to Blueworks Live. To access the process, you must first find the Training Space. Go to the **Library > Spaces** tab and open your **Training Space**.

Part 1: Create a subprocess



Information

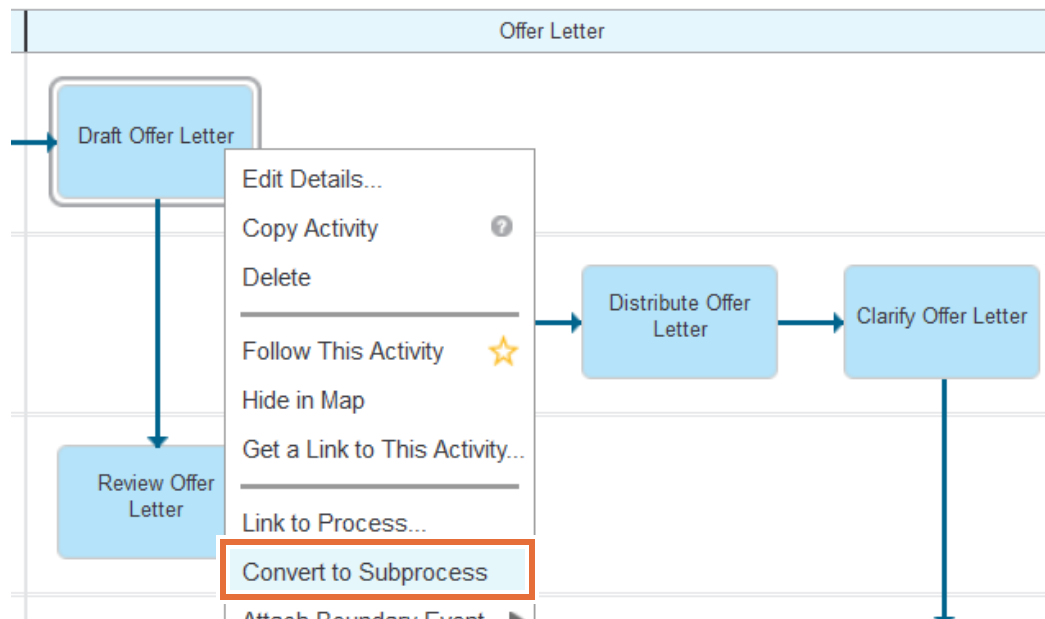
Adding details in a process diagram requires the creation of more discrete process models that portray atomic units of work that is conducted by one or more process participants. This work is known as decomposition, and one way it is reflected in an IBM Blueworks Live process diagram is through a linked process. To expedite the work for this exercise, you next import processes that you link to the existing New Hire On-boarding process. The first part of this section on linked processes is about importing Blueworks Live processes that you can receive from another team member who is assigned to develop the details for these activities.

- ___ 1. Convert an activity to a subprocess.

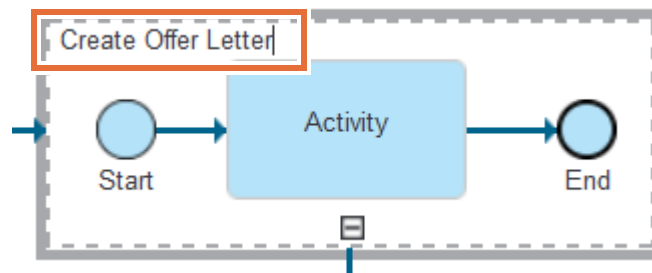
Certain groups of activities can be grouped by using a subprocess. You can identify candidates for subprocesses by determining whether multiple activities can be considered part of a larger theme. By adding the activities to the subprocess, or by breaking down a large activity on a process into smaller-level activities to provide further clarification, you can

abstract information from a higher-level process. In this way, you can add to the readability of the overall process diagram.

- ___ a. Right-click the **Draft Offer Letter** activity and click **Convert to Subprocess**.



- ___ b. The **Draft Offer Letter** activity on the canvas converts to a subprocess with a single activity that is connected to a Start and End event. Click the **Draft Offer Letter** label and change it to: Create Offer Letter



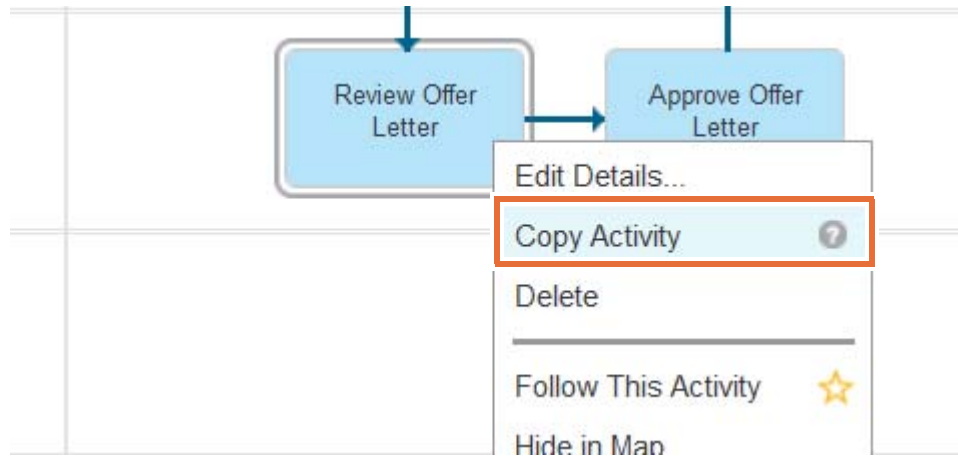
- ___ c. Double-click the **activity**, and at the top of the details box, change the name from **Activity** to: **Draft Offer Letter**



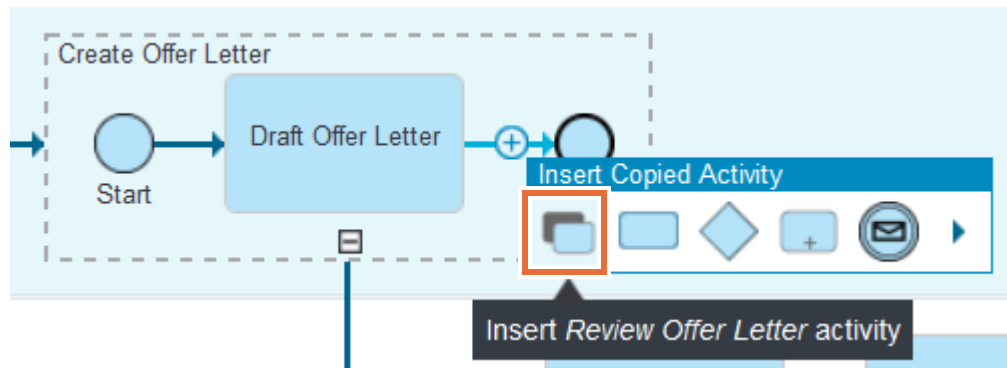
Information

You created just the subprocess and replaced the first activity in the subprocess. You can read any other documentation that was part of the original activity to this new activity in the subprocess. Next, you add more activities that are part of the **Draft Offer Letter** subprocess.

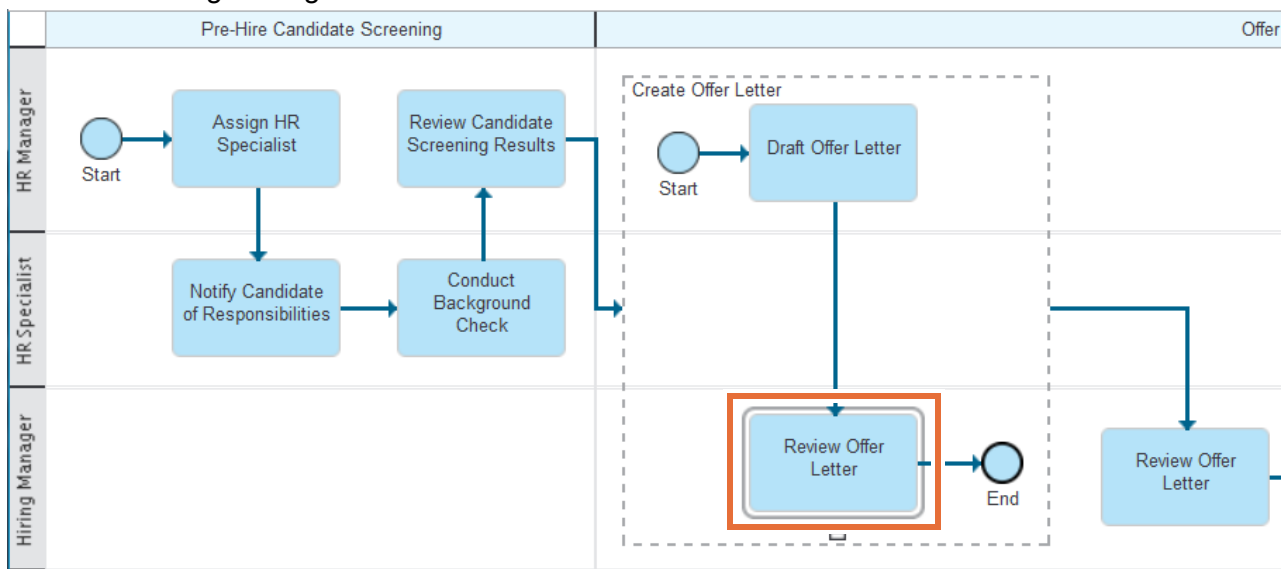
- ___ d. Right-click the **Review Offer Letter** activity and click **Copy Activity**.



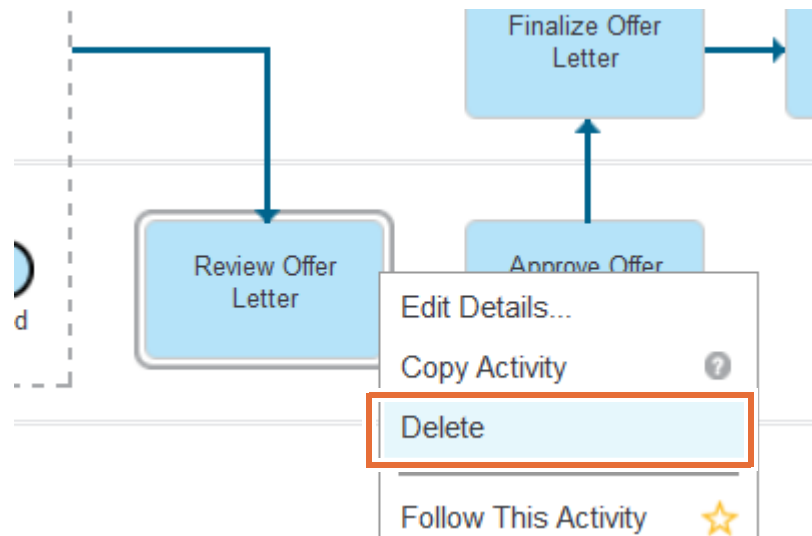
- ___ e. Inside the subprocess to the right of the Draft Offer Letter activity, hover your cursor over the flow line that connects the activity to the End event. When you see it appear, click the (+) plus sign and click the first icon to insert the copied activity.



- ___ f. Drag the new **Review Offer Letter** activity that is now part of the subprocess to the Hiring Manager lane.



- ___ g. Right-click the **Review Offer Letter** activity that is not part of the subprocess, and click **Delete**.

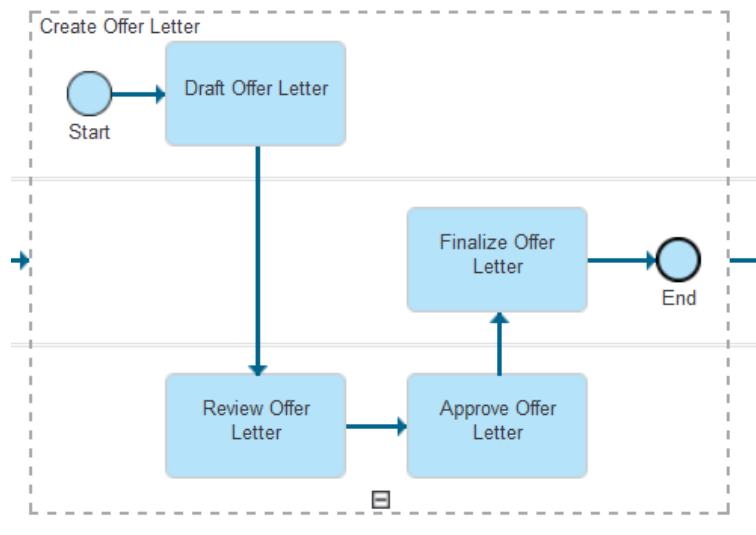


- ___ h. Repeat steps 1.1.d to 1.1.g for the **Approve Offer Letter** and **Finalize Offer Letter** activities.

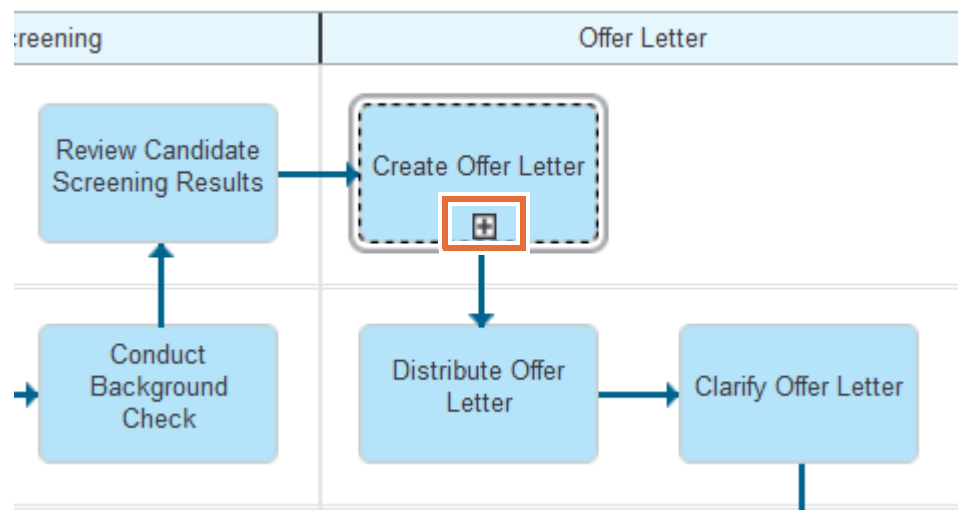


Reminder

Move the activities to their original lanes. The subprocess is now consolidating these four activities to a single subprocess. Optimization happens later.



- ___ i. Click the minus (–) box at the bottom of the subprocess to collapse the contents. To view the contents of the subprocess, you can click the (+) box at the bottom of the collapsed subprocess to expand it.



Optional

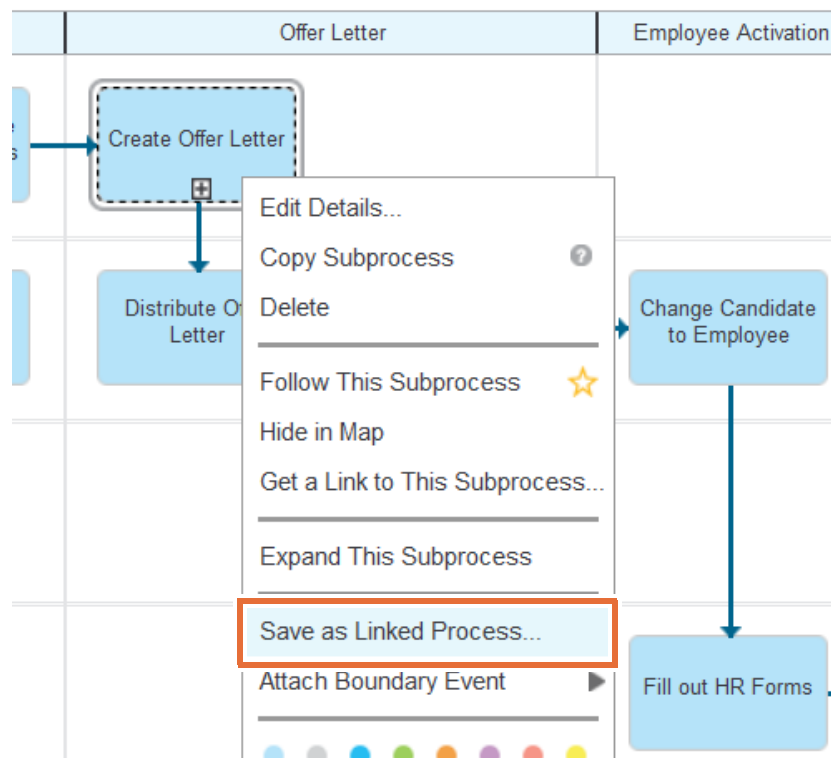
Review the other activities on the process diagram canvas. Write down any other groups of activities that you think might be candidates for a subprocess. At the end of the course, you can create more subprocesses as part of a challenge exercise.

Part 2: Create a linked process

- ___ 1. Convert the subprocess to a linked process and save it to your library.

If you need to reuse the activities in the subprocess, you can create a linked process from the subprocess that you created. In this way, you can export the subprocess to other processes in your library, or reuse the activities in the subprocess wherever necessary.

- ___ a. Right-click the collapsed **Create Offer Letter** subprocess and click **Save as Linked Process**.



- ___ b. Name the new linked process: *Create Offer Letter*

At the bottom, expand the Space Name menu and type in the space name that you created in the prior exercise. As soon as it is completed, 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

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

Select **Create** to start blueprinting your process.

Create



Reminder

Your training space name is listed at the top.

+

Training Space AAA

> New Hire On-boarding

★ ⓘ

hr department Edit Tags

Process Diagram

↕

→

+ Add Milestone

+ Add Swimlane

↶ Undo

- ___ c. The linked process is added to the training space and opens in the editor. Return to the top-level space by clicking the parent link in the breadcrumb navigation.

+

Training Space AAA

> Create Offer Letter

★ ⓘ

+ Add Tags

Process Diagram

↕

→

+ Add Milestone

+ Add Swimlane

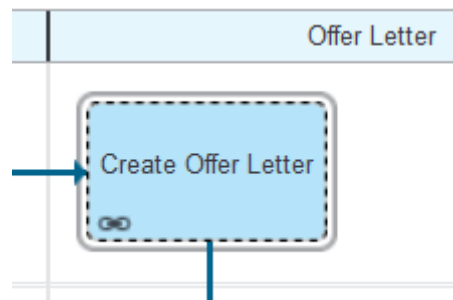
↶ Undo

- ___ d. Click the link to return to the **New Hire On-boarding** process.

The screenshot shows a table of Process Blueprints. At the top, there is a 'Filter' input field, a 'Create New' dropdown, and an 'Import' button. Below this is a table with columns 'Type', 'Name', 'Date', and 'Tag'. The table contains two items: 'Create Offer Letter' and 'New Hire On-boarding'. The 'New Hire On-boarding' item is highlighted with a red box. Below the table, there is a section for 'Process Blueprints' with a count of 2. The 'New Hire On-boarding' item is also shown in a separate box below the table, with a red box around it. It includes a 'Last modified by' field and a 'hr department' tag.

Information

The notation for the new linked process is different from the subprocess that you originally created.



You can no longer expand and view a linked process inside the main process. You must navigate to the linked process page. To open the linked process, you must either double-click the linked process, or right-click to open the **Edit Details** menu. Click the **Process Links** tab, and then click the name of the linked process.

The screenshot shows the 'Create Offer Letter' process page. The 'Process Links' tab is selected and highlighted with a red box. Below the tab, there is a section for 'Link To:' with a red box around the 'Create Offer Letter' link. The link text is 'Create Offer Letter in Training Space AAA'. There are also '+' and '-' buttons next to the link.

Optional

Write down any other candidates that you see for linked processes in your process diagram. A challenge exercise is at the end of this course where you can create these linked processes. The linked processes can also include more detail and new activities for your To-Be process. Although readability is a goal of process development, always keep in mind the process goals. You create process optimizations later in this exercise.

Part 3: Complete the value-add analysis



Information

The “As-Is” process model is analyzed for improvement. The improvements are incorporated into the “To-Be” process model. Part of the analysis is a value-add analysis. Each activity in the process model is evaluated for value to the process by using three criteria: value (yes), non-value (no), and business (required). In this section, the first linked process, As-Is Identification of the Candidate, requires a value-add analysis of the activities.

-
- ___ 1. Complete a value-add analysis of the activities.
 - ___ a. Right-click the **Assign HR Specialist** activity and select the **Edit Details** option from the menu.
 - ___ b. Scroll down in the **Details** tab to the **Value Add** select menu.



Reminder

The Value Add setting is used to indicate activities that a customer would pay for, would not pay for, or are unavoidable for regulatory or other reasons. For this activity, because the oversight processes of the organization dictate that the HR Manager must decide which HR Specialist is assigned, the HR Manager wants the Value Add setting to be set to Required. Keep this activity in mind later on in the course, as this activity might be a candidate for elimination.

-
- ___ c. Open the menu and set the value to **Required**.
 - ___ d. Continue through the activities in the process and assign the Value Add value for every activity in the process.

Part 4: Create a rework loop and other alternate paths in the diagram



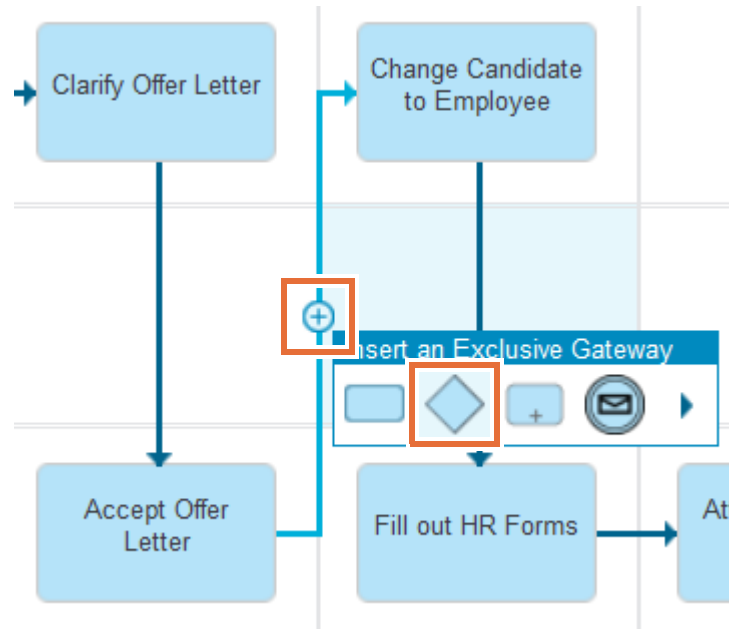
Information

The “As-Is” process diagram that you created represents only the happy path of a business process. Alternate paths are available to be taken in the business process whenever conditions, policies, or situations in the process cause an alternate path to be taken. The process model must communicate these alternate paths. In this section, a rework path is modeled and other alternate paths included.

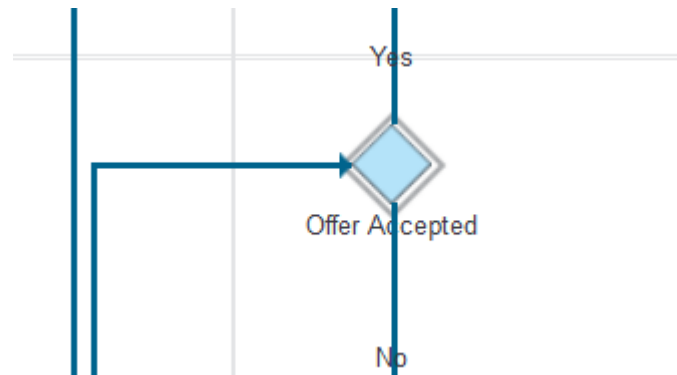
-
- ___ 1. Add a gateway for the first rework path.

If the new hire does not accept the offer letter, you cannot use the As-Is process to return to a previous step. Add a decision gateway to allow the system to return to a previous step if the prospective new hire rejects the offer.

- ___ a. In the New Hire On-boarding process, hover the cursor on the **flow line** between the **Accept Offer Letter** activity and the **Change Candidate to Employee** activity. Click the circle (+) icon to add an element to the flow line, and then click the **diamond icon** to add a gateway.



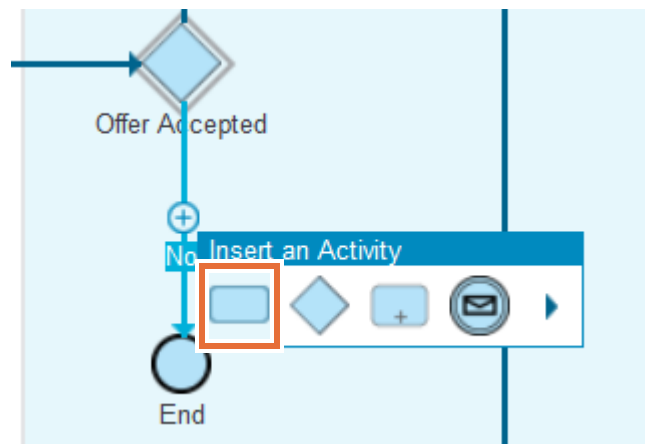
- ___ b. Change the name of the gateway to: Offer Accepted



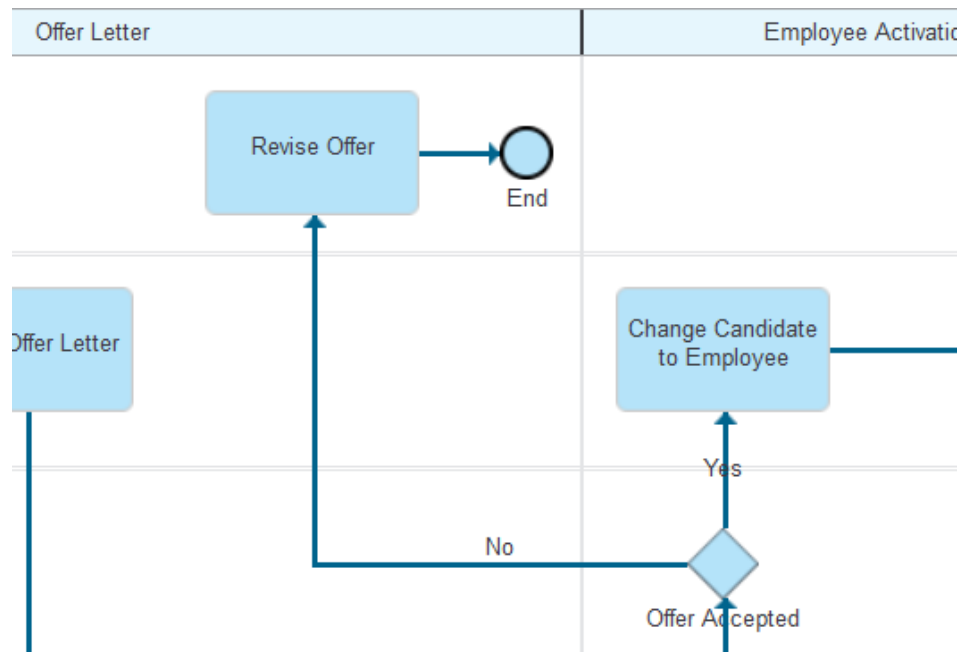
Hint

Gateways always imply a question. Generally, you can omit the final question mark for the gateway label.

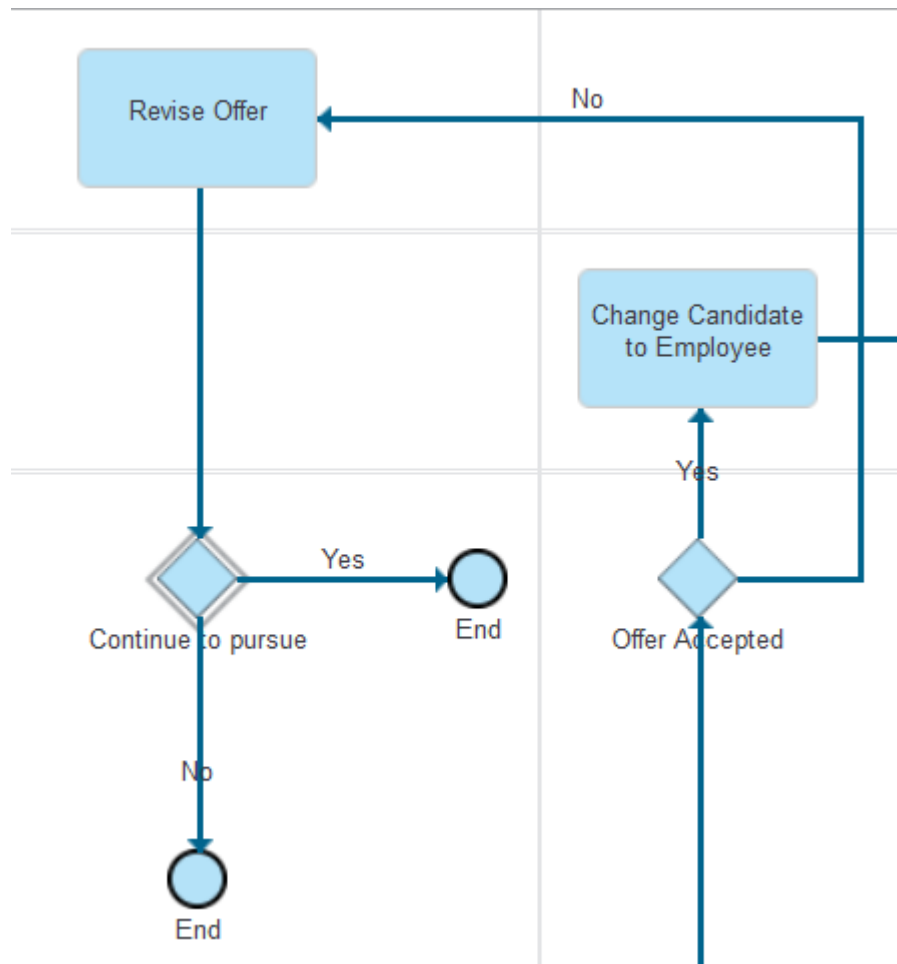
- ___ c. Add an activity between the Offer Accepted gateway and the End event on the flow labeled No.



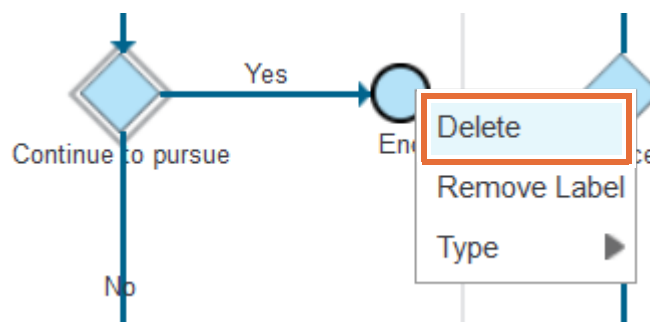
- ___ d. Name the new activity: *Revise Offer*
 Drag the activity to the HR Manager lane inside the Offer Letter phase. Also, move the End event to the same lane.



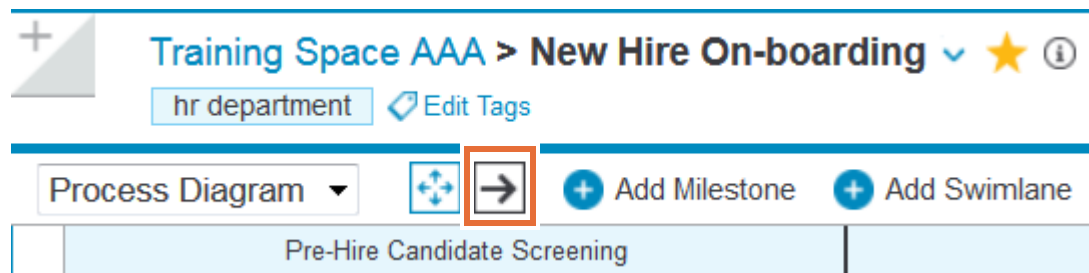
- ___ e. Add another gateway between the Revise Offer activity and the End event. Label the gateway: Continue to pursue
Move the gateway down to the Hiring Manager lane.



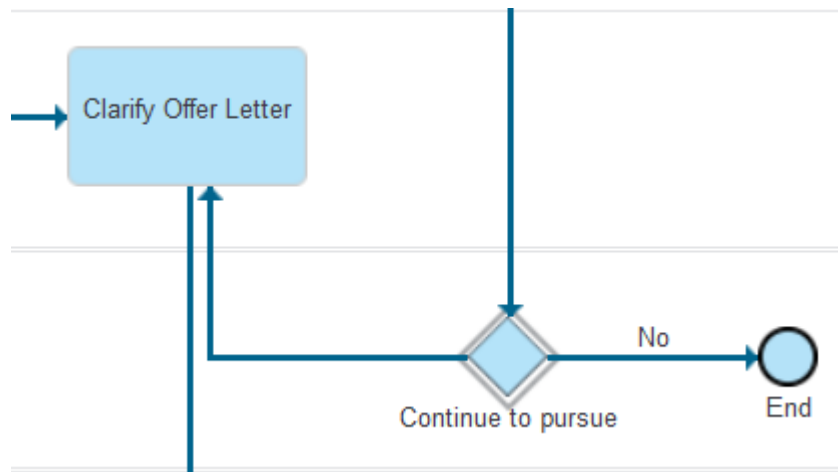
- ___ f. Right-click the **End** event on the Yes flow for the Continue to pursue gateway. Click **Delete**.



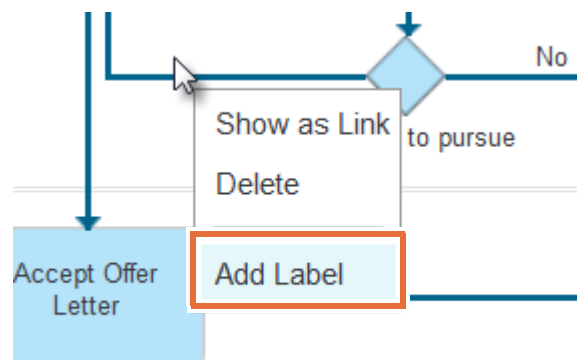
- ___ g. Above the process diagram, click the flow lines button to create a new flow for the gateway.



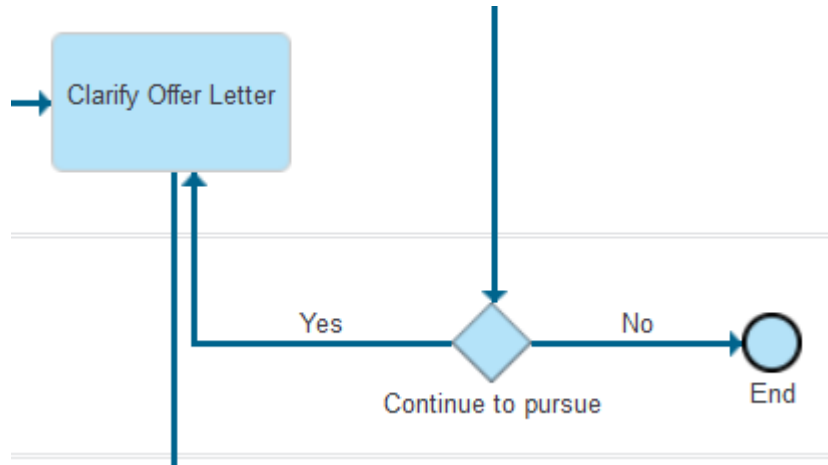
- ___ h. Click the **Continue to pursue** gateway and drag the flow line to the **Clarify Offer Letter** activity. When you release the mouse button, the flow connects the gateway to the activity.



- ___ i. Right-click the **flow** that is connecting the **Continue to pursue** gateway and the **Clarify Offer Letter** activity. Click **Add Label**.



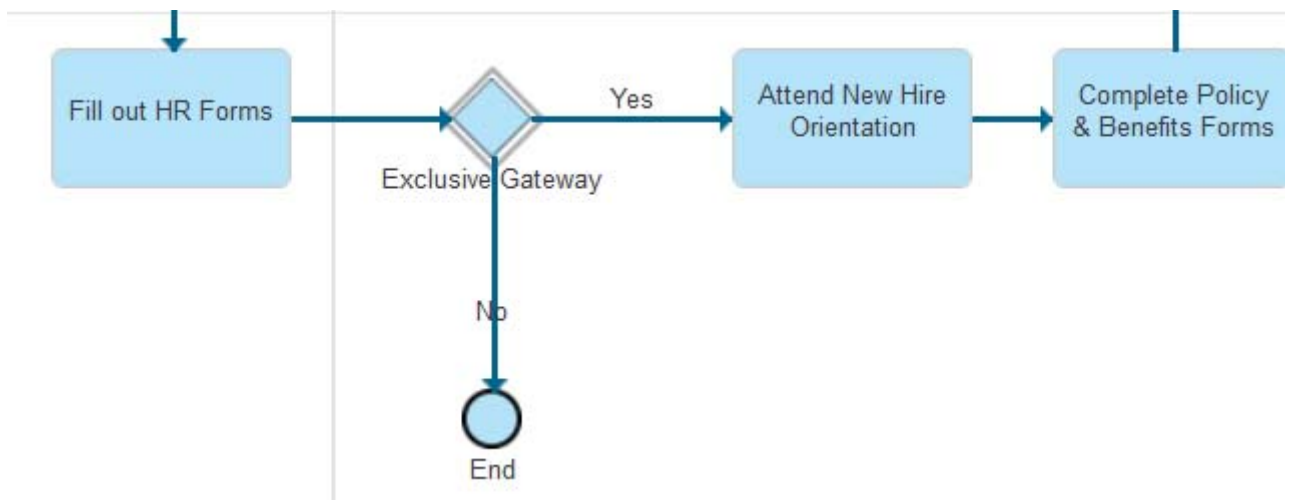
___ j. Name the flow line: Yes



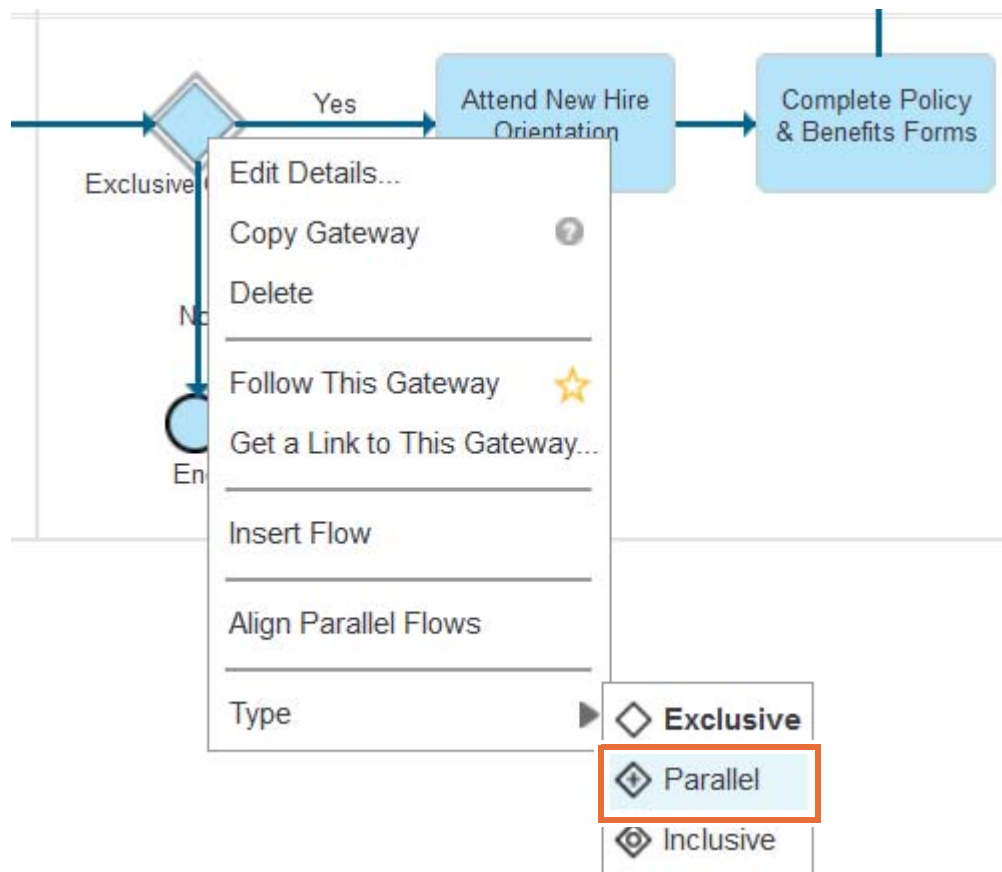
___ 2. Create a parallel gateway.

A new hire must complete three things before the on-ramp activity starts. Those activities are currently modeled as a serial set of activities. Because a candidate might complete the policy and benefit forms before, during, or after the new hire orientation, add a parallel split to this part of the process. That way, the new hire does not have to wait until the end of the new hire orientation to start filling out the forms that are part of the initiation phase. The company badge can also be provided in parallel with the other two activities.

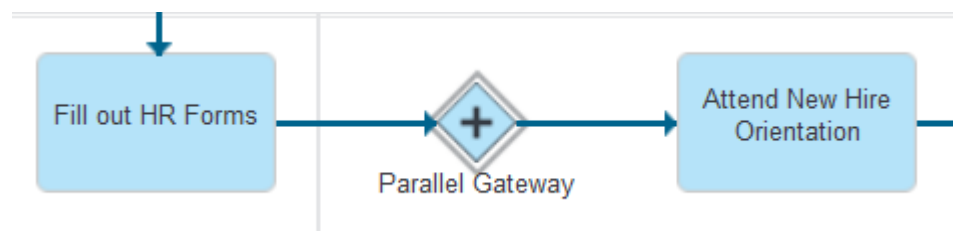
___ a. In the New Hire Work Initiation phase of the process, hover your cursor over the **flow** between the **Fill out HR Forms** activity and the **Attend New Hire Orientation** activity. Create a **gateway**.



- ___ b. Right-click the new gateway, and click **Type > Parallel** to change the gateway to a parallel gateway.

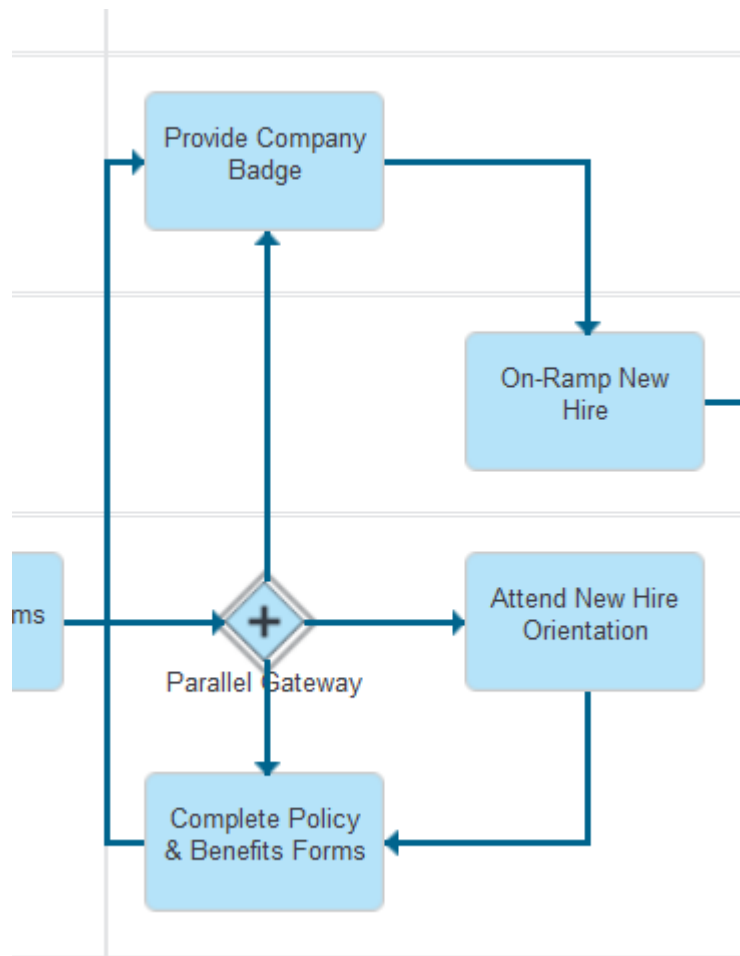


- ___ c. Change the gateway label to: Parallel Gateway
- ___ d. Delete the **Yes** label on the flow that connects the gateway to the Attend New Hire Orientation activity.
- ___ e. Right-click the **End** activity and delete it.

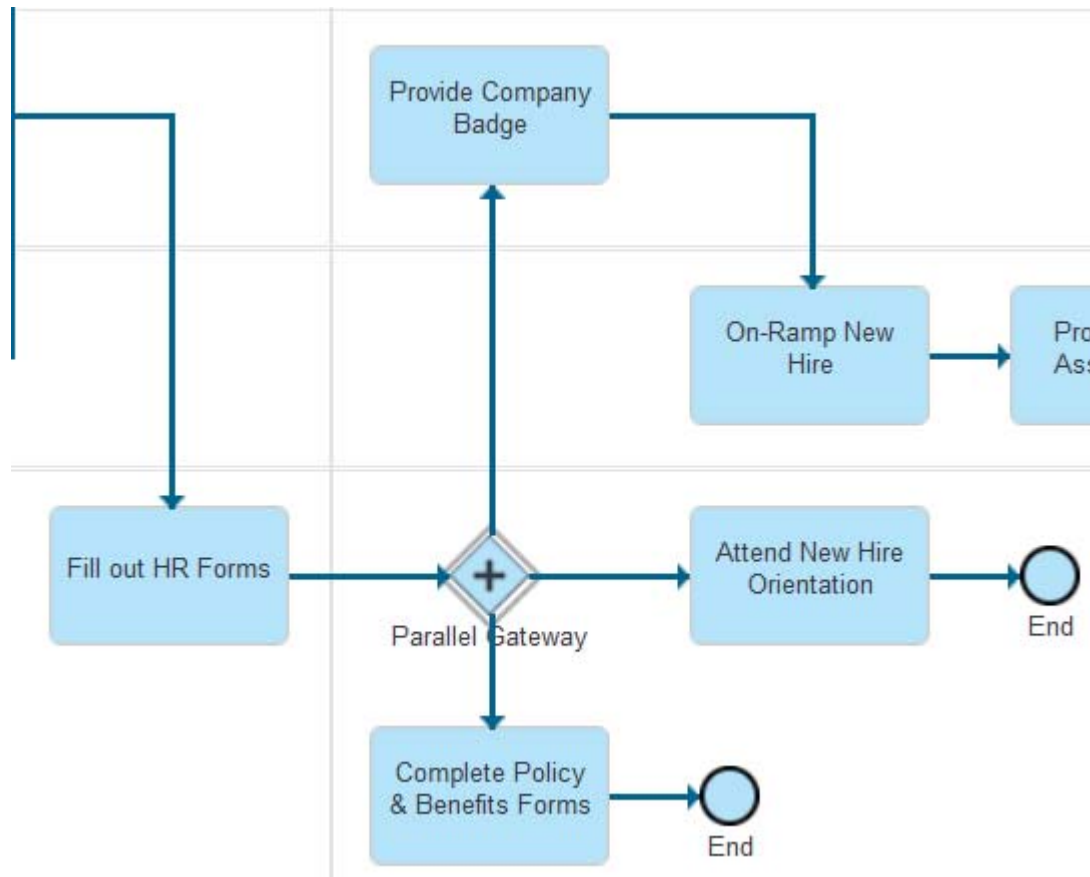


- ___ f. Click the **Flow Lines** tool at the top and draw a flow line from the **Parallel Gateway** to the **Complete Policy & Benefits Forms** activity.

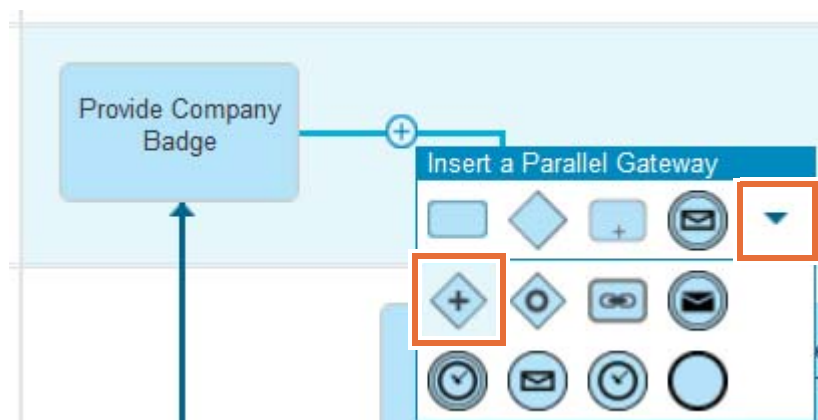
- ___ g. Click the **Flow Lines** tool once again, and draw a second flow from the **Parallel Gateway** to the **Provide Company Badge** activity.



- ___ h. Hover your cursor over the flow that is connecting the **Complete Policy & Benefits Forms** activity to the **Provide Company Badge**. When the flow changes color, right-click the **flow line** and click **Delete**. Delete the other flow that connects the **Attend New Hire Orientation** activity to the **Complete Policy & Benefits Forms** activity.

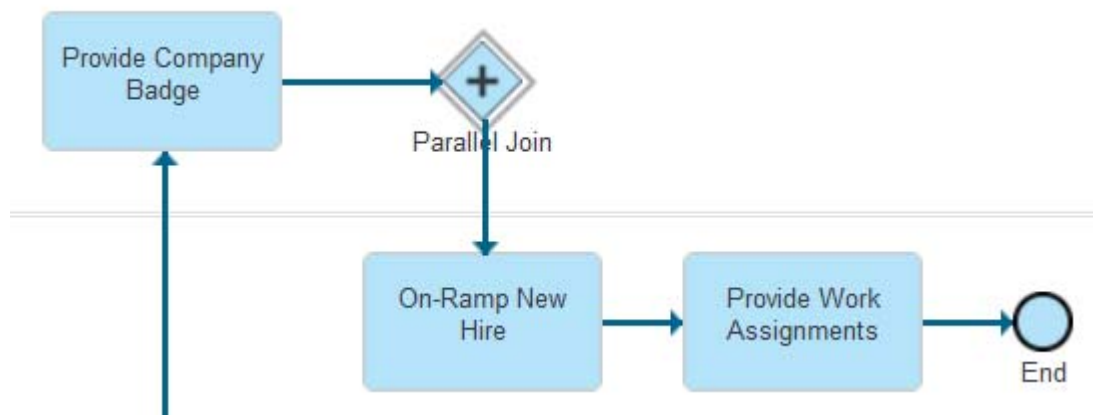


- ___ i. Hover your cursor over the flow that connects the **Provide Company Badge** activity to the **On-Ramp New Hire** activity. Click the (+) plus sign in the circle, but this time, click the down arrow to see the other artifacts that you can create. Click the **parallel gateway** icon to add a parallel join.

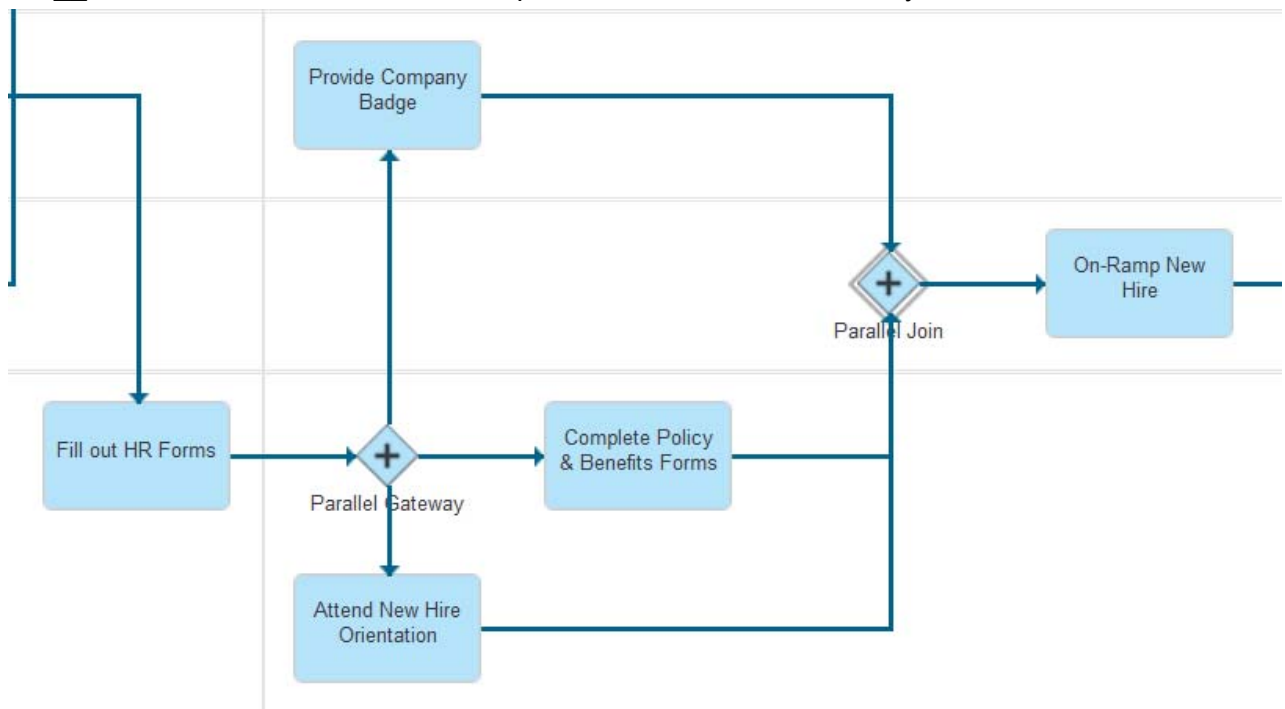


- ___ j. Delete the **End event** that is connected to the new parallel gateway.
- ___ k. Delete the **label** of the flow that is attaching the **parallel gateway** and the **On-Ramp New Hire** activity.

- ___ l. Rename the gateway to: Parallel Join



- ___ m. Using the flow lines tool, connect the flows from the **Complete Policy & Benefits Forms** and the **Attend New Hire Orientation** activities to the **Parallel Join**.
- ___ n. Delete the **End Events** that are connected to the **Complete Policy & Benefits Forms** and the **Attend New Hire Orientation** activities.
- ___ o. Move the **Parallel Join** to a place where the flows are easy to follow and understand.



Hint

Sometimes it is difficult to get the flows to arrange correctly and to make the process readable. When you drag an element on the process to a new location, a vertical line appears. You can place objects before or after other objects on the canvas. Sometimes it takes a few tries to untangle all the flows. Sometimes you can find an open lane above or below the current location that might help to make a clean process diagram.

**Information**

Now, all three activities can be simultaneously performed. This situation should improve the overall process performance because each activity is not waiting for the prior one to complete.

**Optional**

Review your process and identify and write down any rework loops and gateways that you might add to your process. A challenge exercise is at the end of this course where you can further enhance your process. Consider ways that you might improve the overall process where efficiencies might be introduced. By analyzing the overall process, you can improve the process performance and meet the process goals.

Part 5: Replace a user task with a system task

One of the best ways to improve the overall performance of a process is to replace human activities with system activities. That step might require an integration with a system or a database. That step might incorporate cognitive capabilities. That step might require a rules engine to automate decisions. The rules, systems, or integrations for the automated step might not be fully identified at the time of modeling. However, it is important to discuss the implications of automating human activities with the process owner and other process stakeholders. In this part of the exercise, you identify a candidate for automation and replace a user task with a system task.

- ___ 1. Convert the **Conduct Background Check** activity to a system activity.

The **Conduct Background Check** activity in the New Hire On-boarding process activity requires the HR Specialist to do a resume validation and conduct a criminal background investigation on the new hire. When interviewing the HR Specialist, you discover that this activity usually takes 3 – 7 days to complete. While analyzing the steps that the HR Specialist does, you conclude that this activity is a good candidate for automation. Discussing the requirements, the lead developer agrees that this activity might be automated. An integration with the enterprise service bus that uses a rules engine along with a custom web service integration to an external software-as-a-service (SAAS) offering might be a good solution. Because the actual implementation currently is unknown, model a single system lane activity that replaces the human activity.

- ___ a. Right-click the **Conduct Background Check** activity and click **Edit Details**.

- ___ b. Remove the entry in the **Participant** block, and type into the **Systems** field: Unknown System

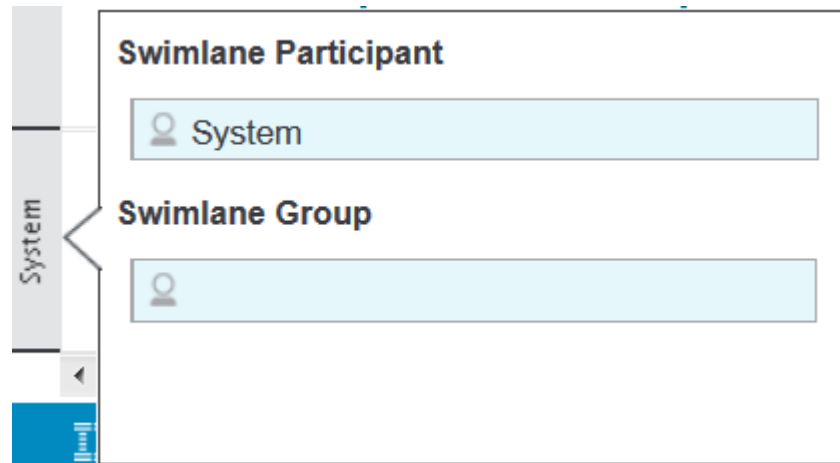


Hint

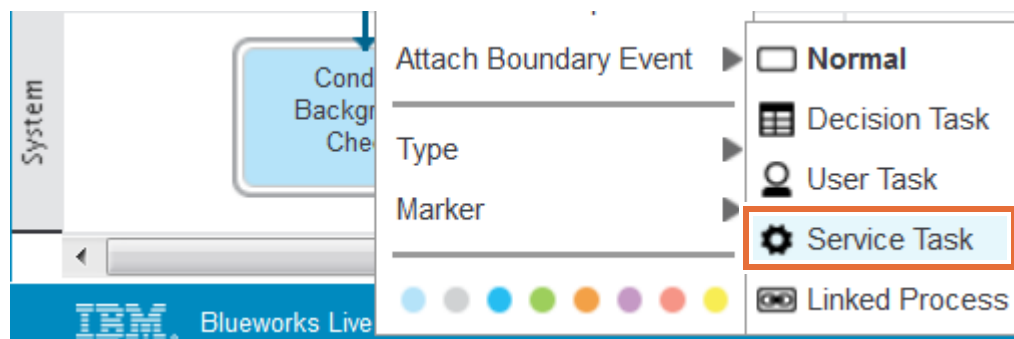
Until the system or systems are identified, it is best to designate that a system should perform the activity, but the system is unknown. If the systems are later identified, add them to the documentation.

When you remove the participant and insert a system, the process diagram changes, and the activity is moved from the original lane.

- ___ c. Click the label of the new lane and change the Swimlane Participant to: *System*

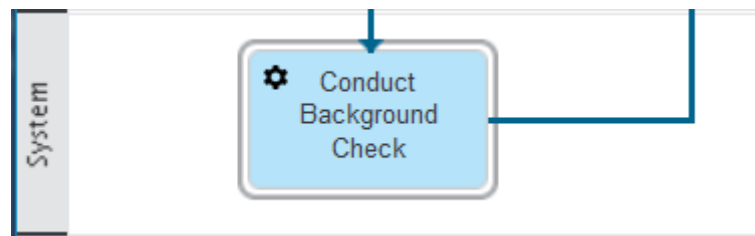


- ___ d. Right-click the **Conduct Background Check** activity, and then click **Type > Service task**.

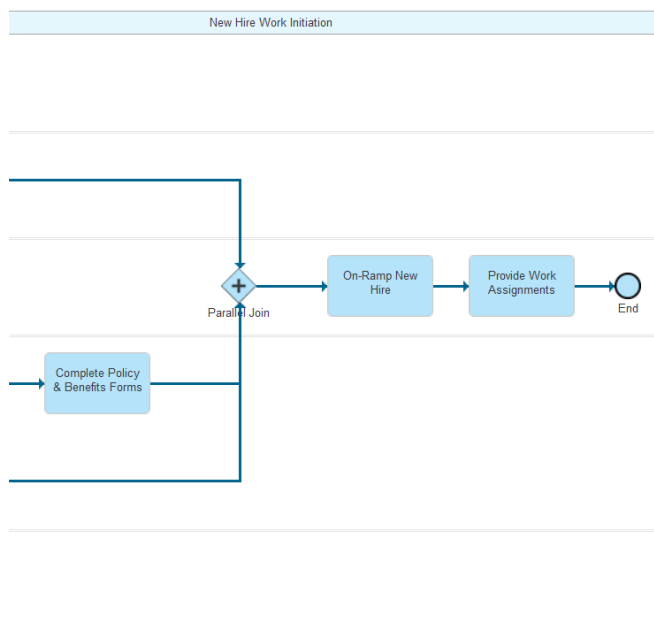
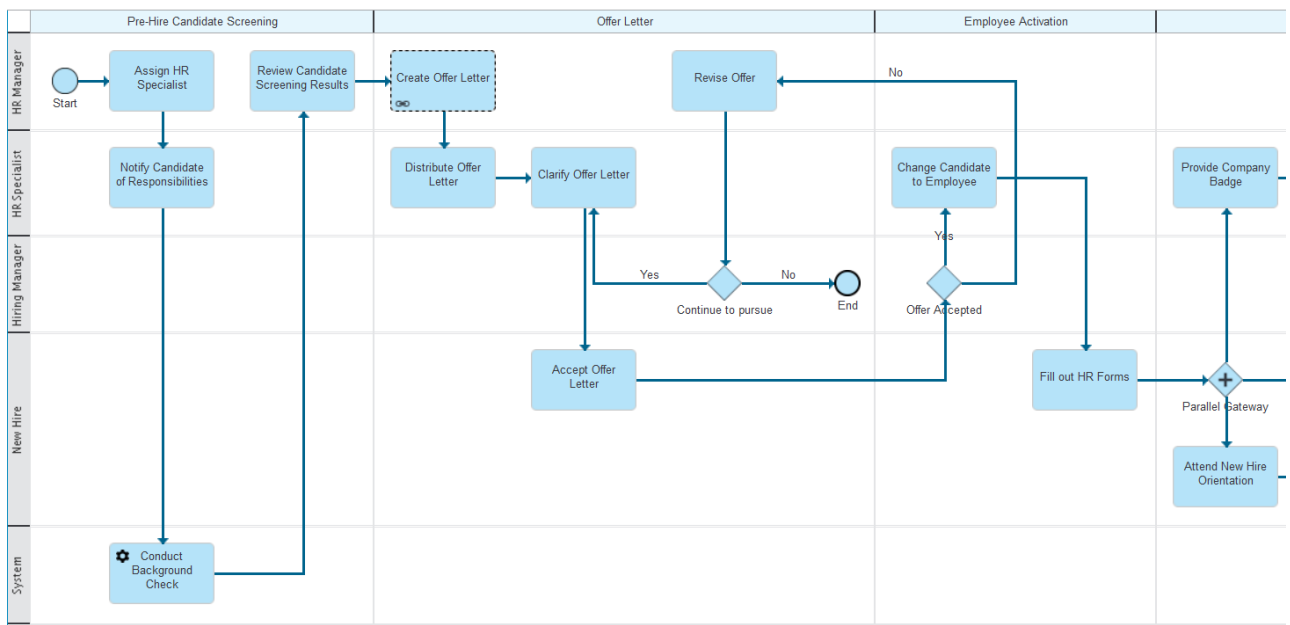


**Note**

The notation is updated to reflect that the activity is a service task that the system runs.



The process should look similar to the following image.





Optional

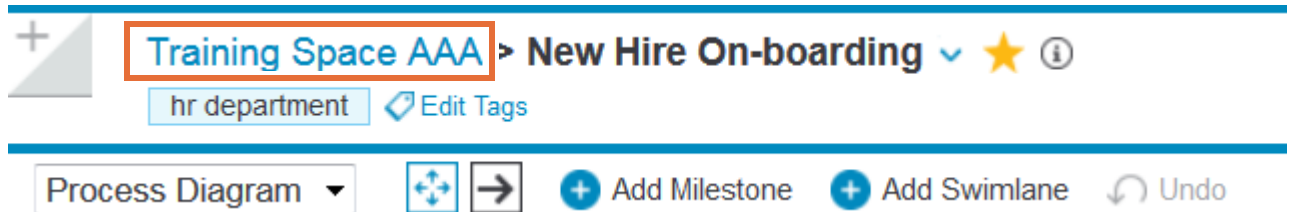
Continue to identify candidates for automation to the process. Write down opportunities to replace user tasks with system tasks. A challenge exercise at the end of the course provides you the opportunity to automate these activities. Consider ways that you might improve the overall process where efficiencies might be introduced. Remember the process goals when identifying these efficiency opportunities.

Part 6: Add details to the activities in the process diagram

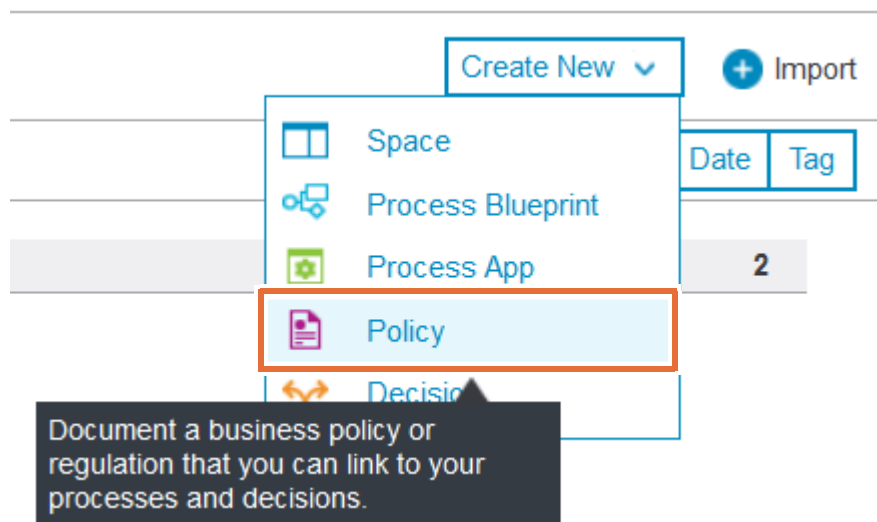
Adding details to the process diagram involves more than just modifying the diagram during collaboration sessions with the process owner. At times, details that are important to the analysis phase of development are shared in these sessions. For example, process problems, challenges for each activity, or policies that drive outcomes from activities are mentioned. As a Blueworks Live author, it is important to capture these details and as much information as possible before the analysis phase. IBM Blueworks Live provides categories for each process activity detail so it is easy to capture and document in the process diagram. This section covers how to accomplish the capture of process activity details.

___ 1. Add a documentation policy for the New Hire On-boarding process.

___ a. Click the Training Space link at the upper left of the process diagram interface.



___ b. Expand the **Create New** menu on the right of the canvas and select **Policy** from the options.



___ c. Name the policy: HR New Hire Documentation Policy

- ___ d. Click **Create** to create the new policy.

Create New Policy

Select a name for your new policy.

Policy Name

HR New Hire Documentation Policy

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

Create

- ___ e. In the HR New Hire Documentation Policy interface, click the **Description** area to access the text editor.
- ___ f. Add the following text in the editor:
- Human Resources must store new hire documentation for a time period of 5 years from the new hire start date.

Description

Human Resources must store new hire documentation for a time period of 5 years from the new hire start date.

- ___ g. Click anywhere outside the editor to add the description.
- ___ h. Click the **Training Space** link at the upper left of the interface to return to the Space front page. The new policy is ready to be added to the New Hire On-boarding process diagram.
- ___ 2. Add the policy to the **Create Offer Letter** linked process.
- ___ a. Open the **New Hire On-boarding** process.
- ___ b. Right-click on the **Create Offer Letter** linked process.
- ___ c. Select the **Edit Details** option from the menu.

- ___ d. Click the **Policies** tab. Expand the policies menu and type:
 HR New Hire Documentation Policy
 Select the policy that you created.

The screenshot shows the 'Create Offer Letter' window with the 'Policies' tab selected. A search box contains the text 'hr new hire'. Below the search box, a list of policies is displayed. The policy 'HR New Hire Documentation Policy in Training Space AAA' is highlighted with a red box.



Important

You might see numerous HR New Hire Documentation Policies. Find the policy with your space that is listed under it.



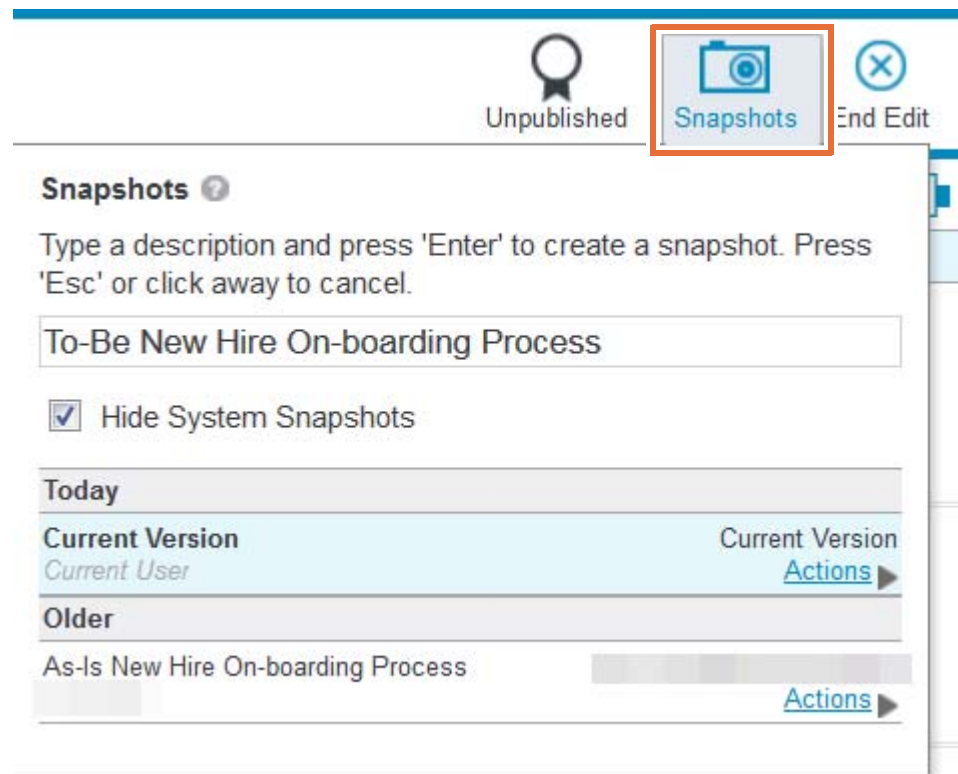
Optional

Consider any new policies that you might add to activities in the process and write them down. Policies are business policies or regulations that you can attach to your processes and decisions, so documenting these policies can be important in capturing your process details and helping understanding the individual pieces of your process.

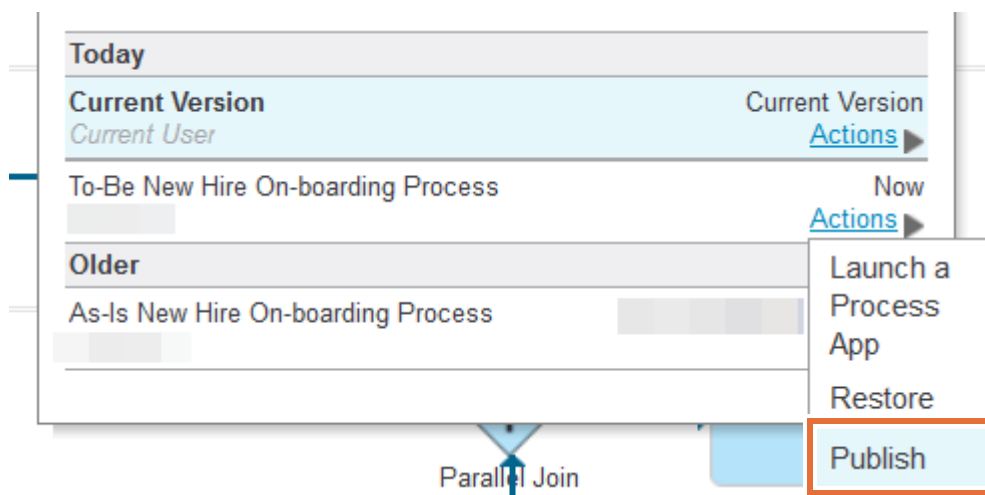
Part 7: Share your process

- ___ 1. Publish a snapshot of your To-Be process model.
- ___ a. Click **Snapshots** at the upper right of the designer window.

- ___ b. Name the snapshot: To-Be New Hire On-boarding Process
Press **Enter** to save the snapshot.



- ___ c. When the snapshot is created, click the arrow next to **Actions** to the right of the To-Be snapshot and click **Publish**.



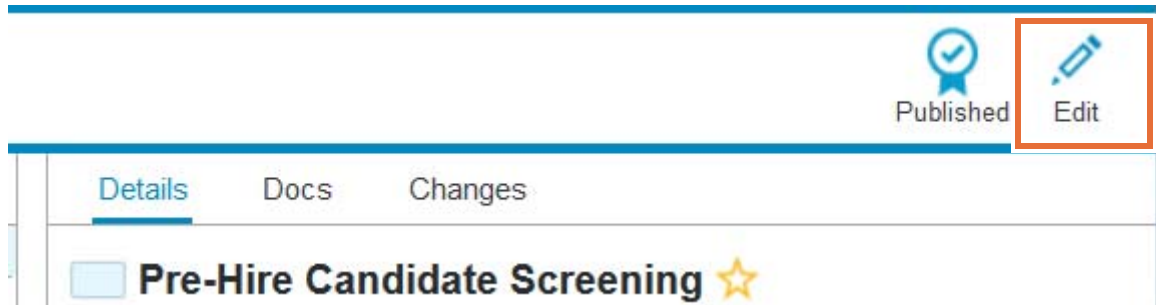
Note

Use the current version of your process to keep editing your process. The other two snapshots can also be restored, published, or used to play back your process during a Playback session.

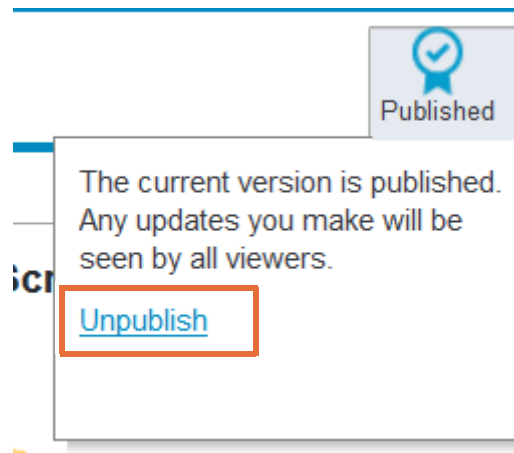


Information

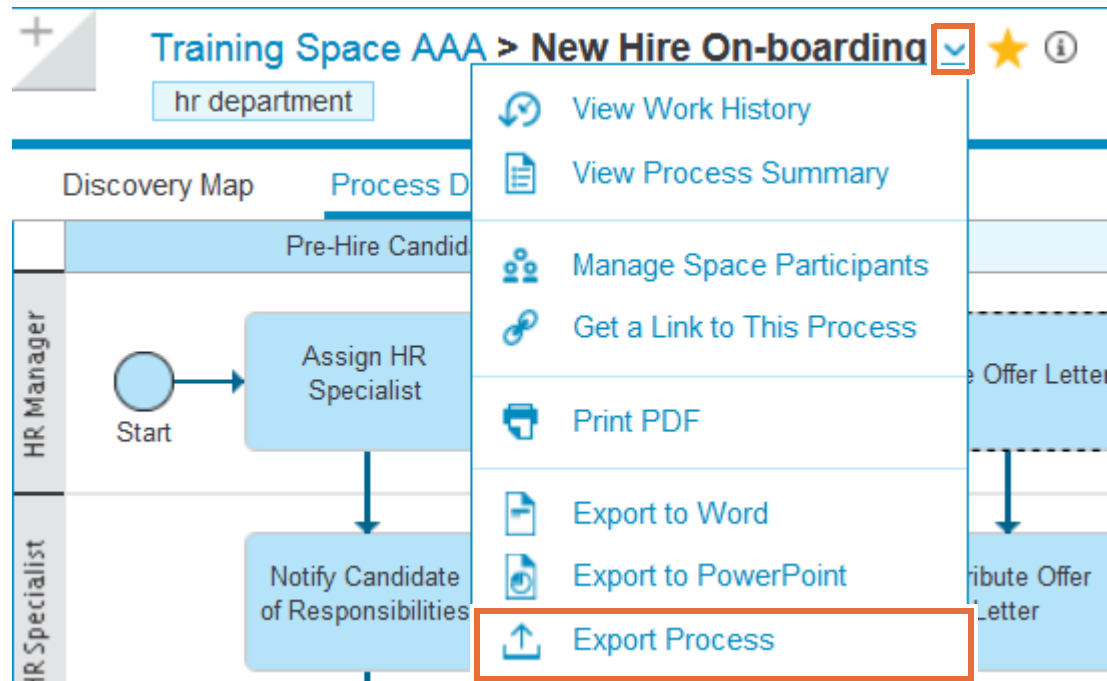
A message at the top alerts you that you are now viewing the snapshot of your process that you published. A window on the right shows some metadata about the snapshot. This version is a copy of your process that is shared with other space participants, and is not editable. To switch to an editable version of the most up-to-date version of the process, you must click **Edit** to return to editing the current version of the process.



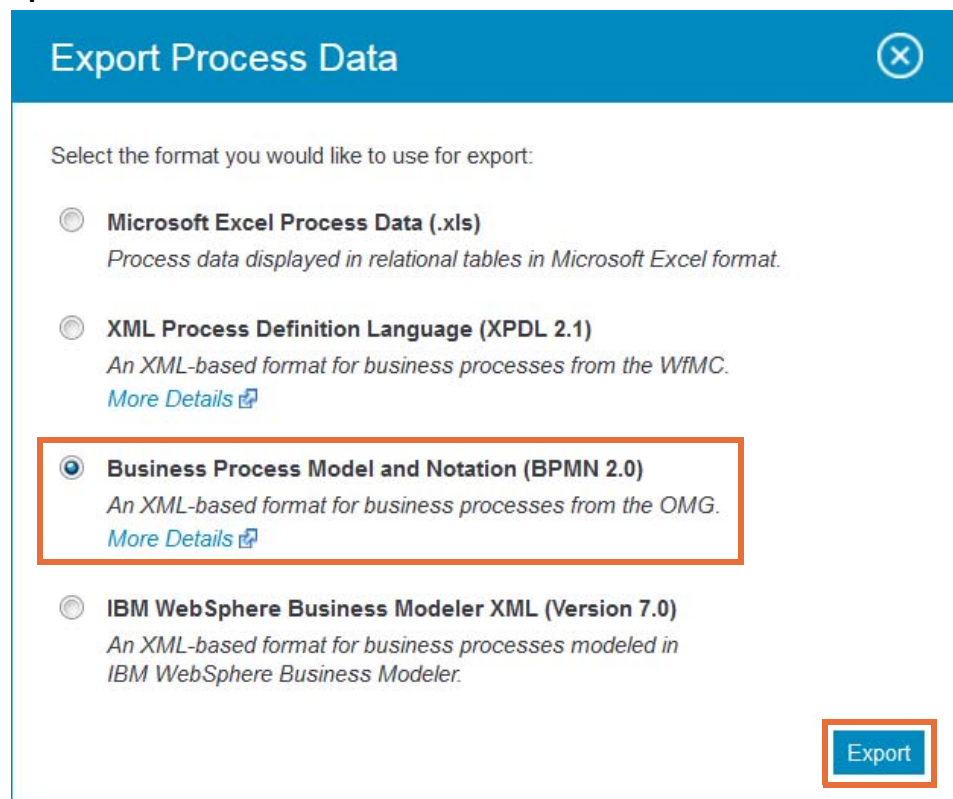
If you cannot click the Edit button, refresh the page, or click the **Published** button, click **Unpublish**, and then click **Edit**. You can then republish at any time.



- ___ 2. Export your process.
- ___ a. To the right of the breadcrumb, open the **menu** on the right of the New Hire On-boarding title. Then, click **Export Process**.



- ___ b. Select the **Business Process Model and Notation (BPMN 2.0)** format and click **Export**.



- ___ c. Save the file to your local hard disk drive.

**Information**

You can use the exported file to share your process with any other software that conforms to BPMN 2.0 (like IBM Business Process Manager), any other Blueworks Live account you might create, or to archive your work. You can also export your process in XML, PDF, or Excel formats.

Exercise review and wrap-up

In the first part of the exercise, you created a subprocess and a linked process in the New Hire On-boarding process diagram. You performed a value-add analysis on the activities of the process. You then improved and optimized the process to meet the process goals. Finally, you published and saved your process to your local machine.

Exercise 5. ISIS and user stories

Estimated time

00:45

Overview

In this exercise, you learn about the BPM artifacts that are available in ISIS.

Objectives

After completing this exercise, you should be able to:

- Use tools in ISIS to help process analysis
- Complete the user stories template for the To-Be process
- Use BPM templates

Introduction

The IBM Systems Solution Implementation Standard (ISIS) is a methodology that the IBM Software Services organization uses to maximize its clients' return on investment in IBM's products. ISIS provides IBM product-specific good practices and execution artifacts based on the experience that is gathered from hundreds of consulting projects.

Some of the ISIS templates that you study and complete in this exercise are:

- Process user stories
- BPMA relationships chart
- Run Playback Zero task descriptor

Requirements

None

Exercise instructions

Preface

This exercise uses three tools that come from the ISIS website. These tools are available to IBM employees, Business Partners, and licensed clients. If you have a services contract with IBM or an IBM Business Partner, these tools are available to use for your projects. This exercise includes these tools for you and exposes you to these tools.

Part 1: Discover ISIS

- ___ 1. Document a list of ISIS main characteristics.

- ___ 2. Use the following BPM Analyst (BPMA) relationships chart from ISIS to answer the next two questions (2a and 2b):



Figure 5-1. BPMA relationships (1 of 2)

Additionally Performs	<ul style="list-style-type: none"> • Define Business Process Characteristics • Identify and Refine Key Business Entities
Modifies	<ul style="list-style-type: none"> • Analysis Assessment • Analysis Business Process Model (To-Be) • BPM Macro Design Agenda • BPM Macro Design Implementation Roadmap • BPM Macro Design Kickoff Presentation • BPM Solution Architecture • BPM Strategy Roadmap • Business Challenges • Business Improvement Request • Business Process Model (As-Is) • Coach list • CoE Charter • CoE Profile • Decision Point Table • Discovery Assessment • Estimate BPM Project • High Level Business Process • Interface Catalog • Process Description • Processes Prioritization Matrix • User Story List • Work Items List

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Main Description

The role of the Business Process Analyst is to build consensus among the different stakeholders on the as-is and to-be process models, and to look for opportunities to improve the current business process. He is responsible to drive the process discovery and analysis for potential future implementation.

- Leads process improvement efforts.
- Expert in process decomposition, process/data analysis, scoping, optimization.
- Identifies business case, key opportunities, prioritized roadmap, and ROI.
- Identifies and enforces delivery of KPIs, SLAs, and scoreboards.
- Help to prioritize the business process portfolio, to select which the business process to implement to bring the biggest return on investment.
- Model the business process using BPMN standard.
- Understand the different business process modeling patterns:
 - Parallel paths
 - Join
 - Exclusive Gateway
 - Event gateway, message

Figure 5-2. BPMA Relationships (2 of 2)

- ___ a. Using the *Additionally Performs* and *Modifies* rows from the table in ISIS Figure 5-2, list the activities and deliverables that you would do as a BPM Analyst in the “New Hire” case study from Exercises 3 and 4.

___ b. Identify the main BPMA responsibilities and deliverables that apply to your organization.

3. Use this “Execute Playback 0” Task Descriptor from ISSIS to answer the following two questions (3a and 3b):

Task Descriptor: Execute Playback 0

Playback 0 is a validation task focusing on high-level business process understanding and building consensus among project sponsors and business process owner.

Based on Method Task: [Execute Playback 0](#)

Relationships			
Roles	Primary: <ul style="list-style-type: none"> BPM Analyst BPM Consultant - Developer 	Additional: <ul style="list-style-type: none"> BPM Integration Consultant BPM Project Manager 	Assisting:
Inputs	Mandatory: <ul style="list-style-type: none"> Analysis Business Process Model (To-Be) 	Optional: <ul style="list-style-type: none"> None 	External: <ul style="list-style-type: none"> None
Outputs	<ul style="list-style-type: none"> BPM Assessment Report Work Items List 		

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Steps

[Expand All Steps](#) [Collapse All Steps](#)

Determine the Goal: Enabling Iterative Development

Playback is a scoping, design and testing tool to define, refine and test the process solution.

But, what if my client doesn't want iterative development? The client's project management team has decided to use waterfall methodology and will no move to an iterative development methodology. How can BPM developers be successful in this atmosphere?

IBM BPM Process Designer is better suited for agile and iterative development, but that doesn't mean that it can't work within a waterfall methodology. There are some overlaps between the two methodologies, but there are some fundamental differences that may make your life more difficult. I recommend you go to the client and identify where Playbacks fit within their approach. Waterfall methodology will have a design phase (sometimes broken into a high-level and detailed design phase) and an implementation phase as part of their waterfall. Conveniently, Playback 0 and Playback 1 can be used as part of the design phase, and Playback 2-5 can be used within an implementation phase. The concept of playing back the process may seem foreign and frightening to a software development group unfamiliar with the concepts, but validation of the deliverables during development (and not after your waterfall step) will become evident to your client if you can convince them to attend or conduct a playback. Waterfall project managers may allow or prefer iterative methods if the benefits are demonstrated and realized. If project management continues to preach waterfall methodology, simply including playbacks inside of their waterfall phases will pay dividends to the BPM development team, and will allow the team to stay "ahead of the curve" compared to those doing waterfall development.

Before your Playback Strategy can be defined you must understand the Total Solution you are providing!

Set the agenda

Figure 5-3. Execute Playback 0_ISSIS Task Descriptor (1 of 4)



	<p>A typical Agenda</p> <ul style="list-style-type: none"> • Introduction by Process Owner (5 min) • BPM by BPM Advocate (5 min) • Process Visibility by Process Owner or Stakeholders (5 min) • Project Description & Milestones by Project Manager (5 min) • The Playback by Representative Participants and/or Process Owner (40 min) • Feedback & Discussion lead by PM or Tech Lead (30 min)
	<p> Determine the audience</p> <p>The Audience is the most important and difficult challenge in coming up with a Playback Strategy. The audience is the driving factor of Frequency, Duration, and Ground Rules and Theme of each playback.</p> <p>Milestone Playback</p> <p>Each Process should have at least four "Milestone" playbacks with the following audience.</p> <ul style="list-style-type: none"> • All business participants (At least one representative of each group) • All business stakeholders in the process • Report consumers (Decision Makers) • Process owners • Process developers • Engagement Manager • Sales Team? <p>It is important that the same audience be present at each of the four or five Milestone playbacks. It will be important for that consistent feedback from each playback to the next. These milestone playbacks should play back the business process from start to finish—even the first playback should be able to accomplish this. Each new milestone may add a new level of detail. (insert link to or table of suggested themes)</p> <p>Focused Playback</p> <p>Given that a process may need more iterations in front of some of these groups, smaller "Focus" playbacks should be scheduled. A <i>focused</i> playback might include a deep-dive on a single activity and the coaches for that activity. These sessions need to include representative participants from that activity whereas other participant groups, process owners and other process stakeholders may be optional. It is beneficial to have 1-2 focused playbacks each week depending on the size of the process and the size of the development team.</p> <p> Set the roles</p> <ul style="list-style-type: none"> • Assign the roles... it is good to have 2, 3, or 4 presenters alternating between topics and/or slides. It is good to have the Process Owner do the introduction. • Make sure all the actors know their parts... practice, practice, practice. • Preview the room and test the equipment (two Projectors?). Make sure the room is large enough to comfortably accommodate your audience and that each seat has good view of the screen(s). <p>Facilitator</p> <p>You or the client. In either case the facilitator needs to be a forceful presence.</p>

Figure 5-4. Execute Playback 0_ISSIS Task Descriptor (2 of 4)

- Keep the conversations relevant to the theme,
- suggest that issues be placed in the parking lot
- Don't be afraid to timebox conversation
- Improvise.

Note Taker/ Scribe

If you are not facilitating the playback, you will need to be the scribe. Capture those new/missing/enlightened business requirements. Document any decisions made. The Milestone playback is not the place to discuss and solve most issues.

Validate the process before play back meeting

Make sure the process and everything you are demonstrating, works.

Playbacks will occur while the Process is in varying states of completion. Set a theme that tells the audience what aspects of the process are being discussed, and what aren't.

- A series of focused playbacks might have the following theme progression "What, Who, How". Milestone Playback themes might be "Validation, Integrations, and Exception" where each of those terms is used in its most general sense.
- A ground rule might be "To foster complete understanding, no part of the process is Out of scope in this discussion"
- A ground rule might be "Open and Honest communication". Empress upon the audience that A straight-forward answer will not be used against them later.

Play back BPM ability

The clear and powerful way to playback the ownership value of this solution is to have the playbacks simulate production, and let the client deliver them.

The very best playbacks are those delivered by the Process owners **and not by the developers!!** This means if you are a consultant (Project manager, BPM Consultant, or BPM Analyst) your role in the playback is best if it is a **silent** one. Your purpose in preparing for the playback is to *coach* the presenters and act as the *director* of the production.

- If the process owners cannot run the playback, they cannot run the process
- May require you to bite your tongue: Weigh intervention against the goal of Customer Ownership. Don't correct your presenters from the back row during the playback. A few mistakes or mis-spoken items are o.k. and far better than the consultant in the back row speaking up as "the expert" while the process owner is trying to present.
- When you do speak, tie everything back to process owners.
- Use the same mechanisms that users will use. Generally this mean use the Portal, to start process, check their status, manage their team...
- Be wary of turning off Coach level validation in order to 'ease' the walk-through. Validation is often essential to the process.
- Use Multiple Projectors to allow for multiple participants. The screen that doesn't have the token can be showing the Portal-Process model or the current Instance.

Play back the process

- When modeling a business process, the flow elements (branches, paths, events, splits, swimlanes) and

Figure 5-5. Execute Playback 0_ISSIS Task Descriptor (3 of 4)

patterns should be modeled in the BPD before constructing any back-end data objects, or embedding any functional logic in the components.

- The initial playback sessions should be focused on verifying the process as depicted by the model
- When the process-flow of the model has been determined to a reasonable accurate degree, functional coaches can be constructed to help demonstrate the UI flows for users.
- When building a coach, the functional elements of the coach (control types and layout) should be determined before any visual sophistication (styles, fonts, dynamic UIs) or constructing the back-end data objects that will supply the coach with data. Coaches typically undergo a large set of changes during the initial development, so any visual design or data binding work is likely to need revision if it is built too soon.
- The later playback sessions should be focused on verifying the functional layout of the coach.

If the customer is not building a custom portal they have bought the portal and it needs to be played back. You will need to:

- Use the portal to start task
- Use the portal to run tasks
- Use the portal to view the process status
- Use the portal to reassign tasks

Things to Practice


You would never plonk your way through the processes in a half-dazed confused state, so don't do that in the portal.

** Know the default sort order in your history view*

** Create, explain, and use a search if the OOB views are inadequate.*

** TAILOR TO THE PORTAL EARLY The longer the process' is displayed with cryptic Process Names, meaningless Task Subjects, inaccurate Due Dates, and placeholder Coaching Text, the more the customer will perceive the value of the solution to lie elsewhere. The more the emphasis will shift from the inherent benefits of BPM and the more it will shift towards automation. Know this, Man.*

If you are letting the client run the playback, they will be unable to use Consultant's tricks to know what happened to a task after submit was hit. If you are in control, you should only know what the user would know.

 **Play back the value**

At some level the customer bought value.

An overly Process-Centric Playback Strategy runs the risk of taking the value proposition for granted.

- Demonstrate ROI using Established metrics. Don't have metrics? Get some.
- Custom Reports and Scoreboards need to be tested and refined just as much as the process itself.
- Show how the OOB scoreboards manage the process. If you think you can demonstrate this off the cuff, you may be in for an embarrassing awakening.
- Practice all of this, because if you stumble, they will lose their confidence and Piece of Mind.

Figure 5-6. Execute Playback 0_ISSIS Task Descriptor (4 of 4)

- ___ a. After reading the document, create the agenda for the Playback Zero meeting for the “New Hire” case study that is used in this course.

___ b. Select all the Playback Zero participants for the “New Hire” case study from the list:

- Company CEO
- HR Specialist
- HR Manager
- Accounts Payable Clerk
- Hiring Manager
- Candidate from the “New Hire” process
- Data Center operator
- Head of Help Desk group
- Current Help Desk employee
- Business Analyst for Company Manufacturing

Part 2: Create user stories

- ___ 1. Complete this user stories template on the next page with the user stories that were identified in the To-Be “New Hire On Boarding” process. User stories for the first two activities are provided to you. Follow this format and complete the user stories for all activities in this spreadsheet.

[illegible]

Figure 5-7. User Stories Spreadsheet

Part 3: Discuss your results

If you are part of a classroom environment, complete the following steps:

- ___ 1. Discuss the user stories that you created with the user stories template. Compare your user stories with other students.
- ___ 2. Compare your list of ISIS main characteristics to the main characteristics from Unit 6.
- ___ 3. Compare your list of BPMA responsibilities and deliverables with other students in the class.
- ___ 4. Compare your agenda and participants list for the Playback Zero meeting.

Exercise review and wrap-up

This exercise exposed you to the documents available in ISIS to help analysts with the documents that are required for Playback Zero. You learned about the definition and transition of business process requirements that you are going to see in the next units.

Exercise 6. Playback Zero

Estimated time

01:00

Overview

In this exercise, you experience a typical Playback Zero session.

Objectives

After completing this exercise, you should be able to:

- Conduct Playback Zero

Introduction

This analysis of the process diagram concentrates on the tasks that are performed in the process. Each task can be evaluated as either a necessary or an unnecessary task to make for a comprehensive and efficient business process. This exercise demonstrates a Playback session that attempts to build consensus on the process model. The aim of these Playback sessions is to eventually come to a final To-Be process model that is agreed upon, and then the transition to the next Playback phase occurs.

Requirements

Completion of all the previous exercises in this course.

Exercise instructions

Preface

This exercise covers the method that is used by BPM teams to conduct review sessions on the process diagram development. This method includes collaborative ongoing reviews and planned review sessions called Playbacks.



Note

If you are not logged in to Blueworks Live, follow the same procedure as noted in Exercise 2 to log in to Blueworks Live. To access the process, you must first find the Training Space. Go to the **Library > Spaces** tab and open your **Training Space**. Finally, open the **New Hire On-boarding** process blueprint.

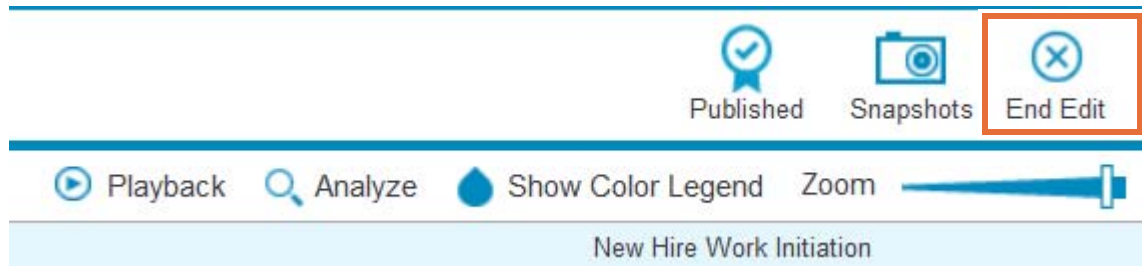
Part 1: Collaborate on the process diagram



Information

IBM Blueworks Live authors prepare process diagrams of either the “As-Is” process or the “To-Be” process for review by business stakeholders. These reviews happen in one of two ways, through ongoing development collaboration reviews or planned review sessions known as Playbacks. For the more informal development collaborative review, IBM Blueworks Live provides a function to transform a process from the edit mode of development into a non-edit view mode. This function protects the process from unwanted alterations and provides business people an opportunity to review interim development status of the process model. This section is about the edit and non-edit modes for a process diagram.

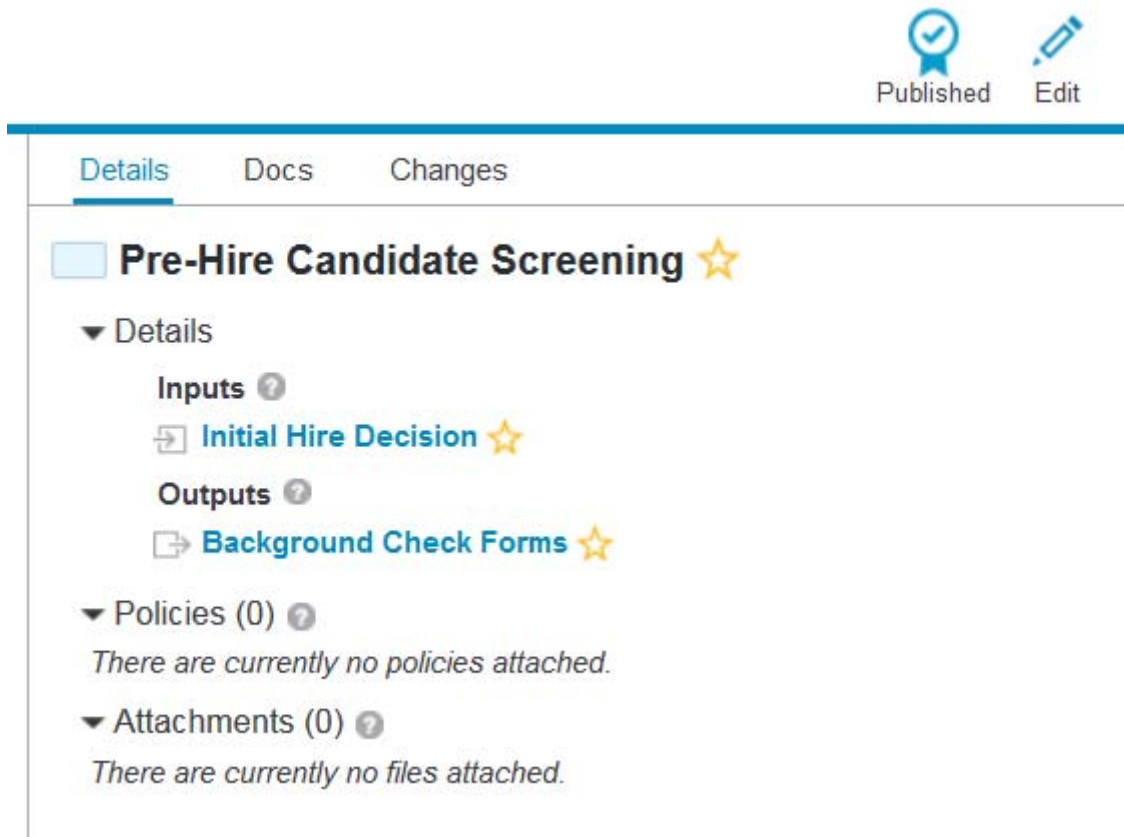
- __ 1. Change the edit mode of the process diagram.
 - __ a. Click **End Edit** on the function menu at the upper right of the process diagram interface.





Information

The process diagram is now in view mode, as shown on-screen for a few seconds. View mode protects the process diagram from further modification until the review period is completed. The button also changes to **Edit**, and when clicked, the process diagram returns to full edit mode.



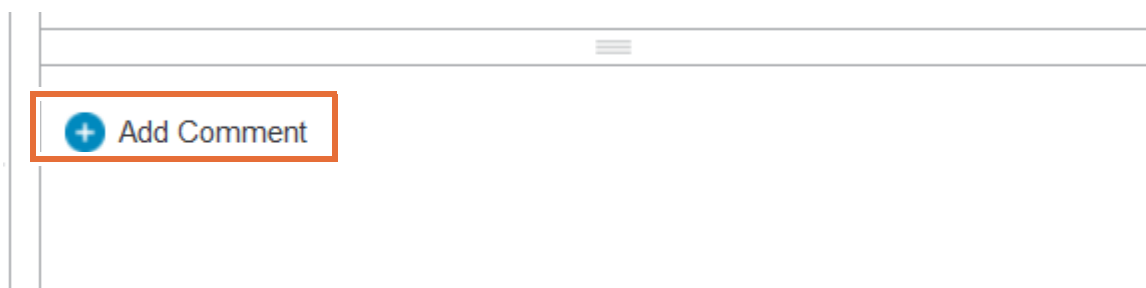
- ___ b. Click the **Review Candidate Screening Results** activity in the process diagram.



Hint

If you removed or changed this activity, select a different activity on the process diagram.

- ___ c. In the bottom window in the information section on the right, click **(+) Add Comment**.





Information

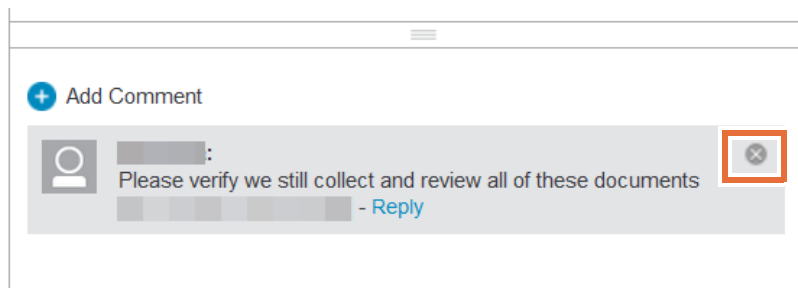
Contributors or business stakeholders who review the process diagram in view mode can comment on the model activities. This comment might be used when preparing the process for the next iteration, and might generate an item for the project backlog through this collaboration.

- ___ d. Add the comment: Please verify we still collect and review all of these documents. Click **Add Comment** to complete the entry.



Information

The comment is now part of the details pane on the right side of the view mode interface. During the stakeholder discussion, this question was answered, so click the **X** icon in the upper right to delete the comment.



- ___ e. Click the **Edit** icon on the function menu bar at the upper right of the process diagram interface to exit out of the view mode.

Part 2: Create the Playback paths to validate in the Playback session

Information

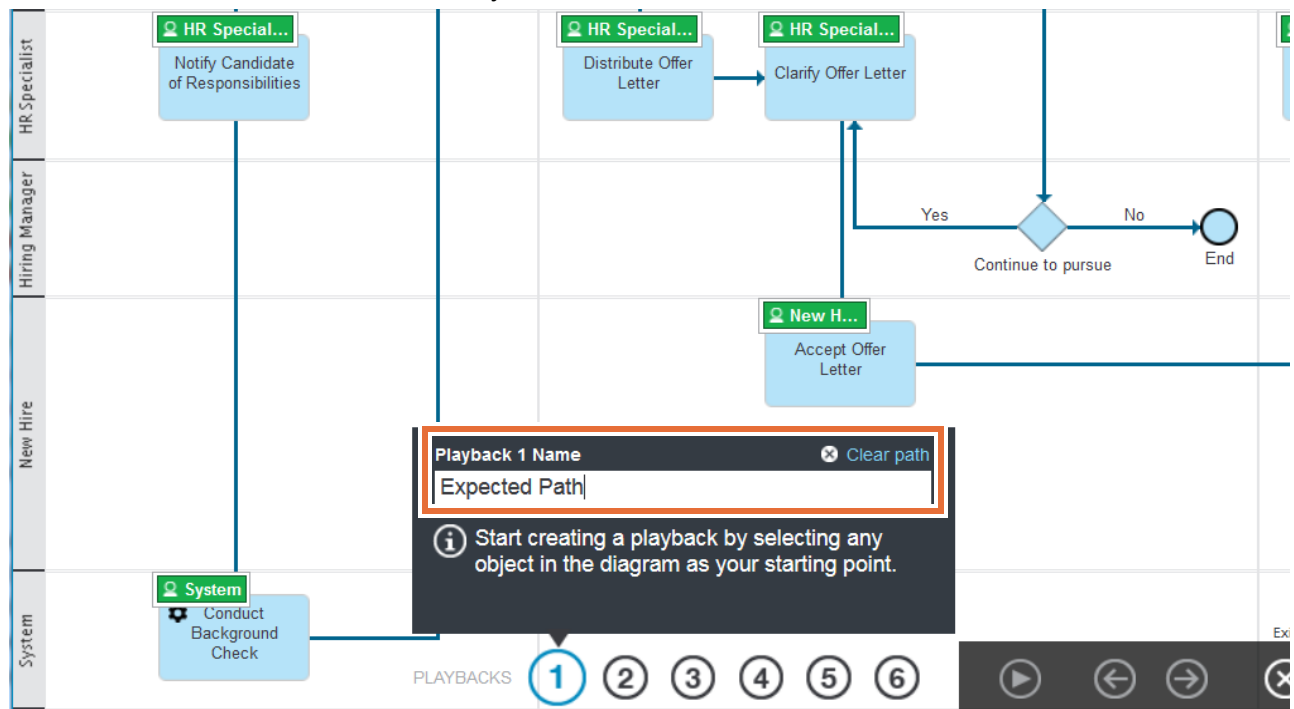
Now it is time for the formal process model review session that includes all business stakeholders, including process participants and experts. This session is known as a Playback. To prepare for the session, an IBM Blueworks Live author does a Playback of the process diagram with details. Playbacks in IBM Blueworks Live require minimal setup of the process paths to review.

___ 1. Establish the first Playback path.

- ___ a. Click **Playback** in the function menu in the upper right side of the process diagram interface.



- ___ b. The Playback interface is shown. The process diagram is shown with tags on the left and the details pane on the right. To begin the creation of the first process path to review, create the first Playback name: Expected Path



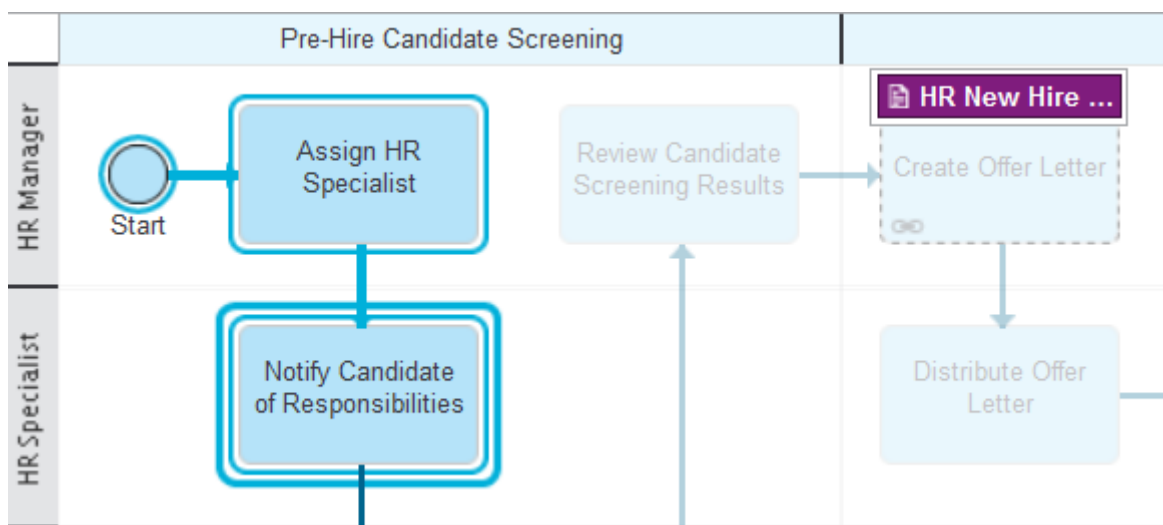
- ___ c. To begin adding the process diagram elements, or objects, for the path, click the **Start** event. The object is now highlighted as the first object in the Playback, with the details pane populated with the information for the element.

- ___ d. Next, click the **Assign HR Specialist** activity.

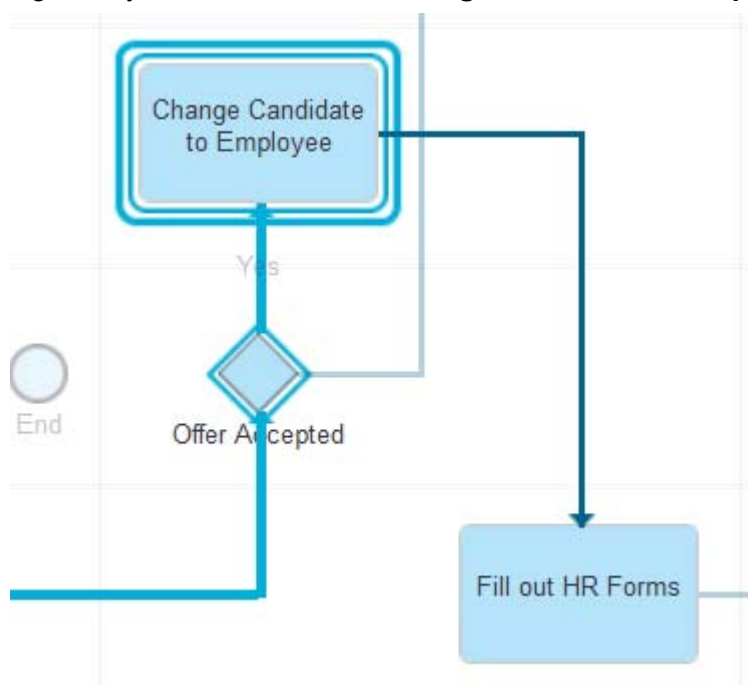


Note

The first Playback path is highlighted as elements are added, while the other elements in the diagram are dimmed. As you click the activities along the path, the details window on the right updates with the details of that activity.



- ___ e. Continue clicking the activities until you arrive at the first gateway. Click the **Offer Accepted** gateway and then click the **Change Candidate to Employee** activity.

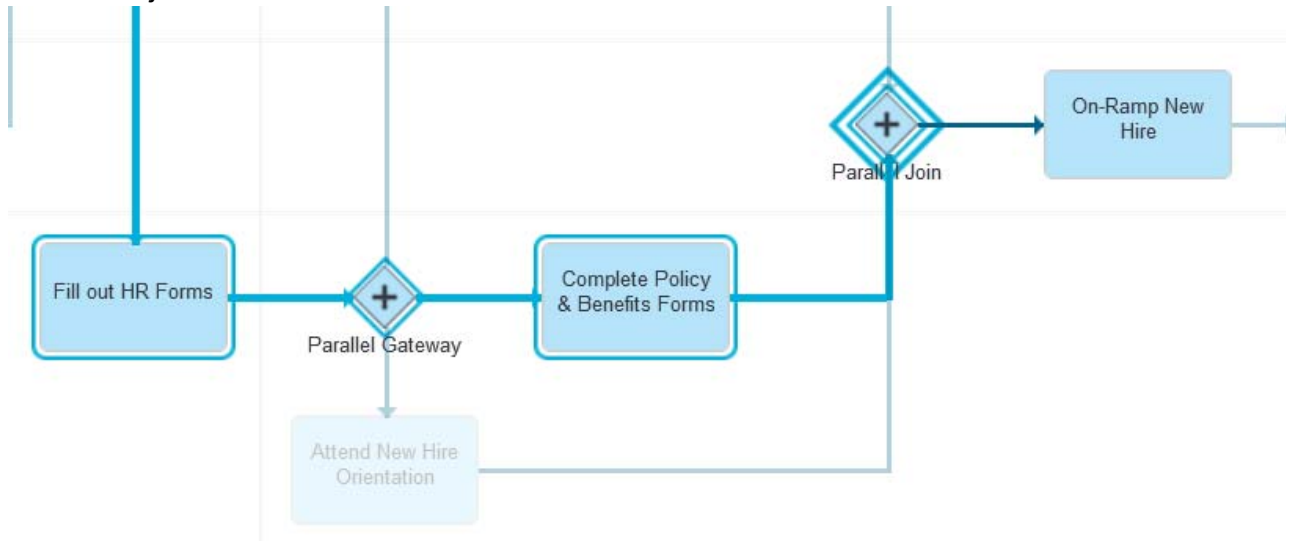




Important

The expected path (also known as the happy path) should be the most direct path to process completion with a successful outcome. You create the less optimal Playback paths later in this exercise.

- ___ f. Continue to click the activities on the expected path until you get to the parallel split gateway. Click one of the activities that are part of the split, and then click the parallel join.



Important

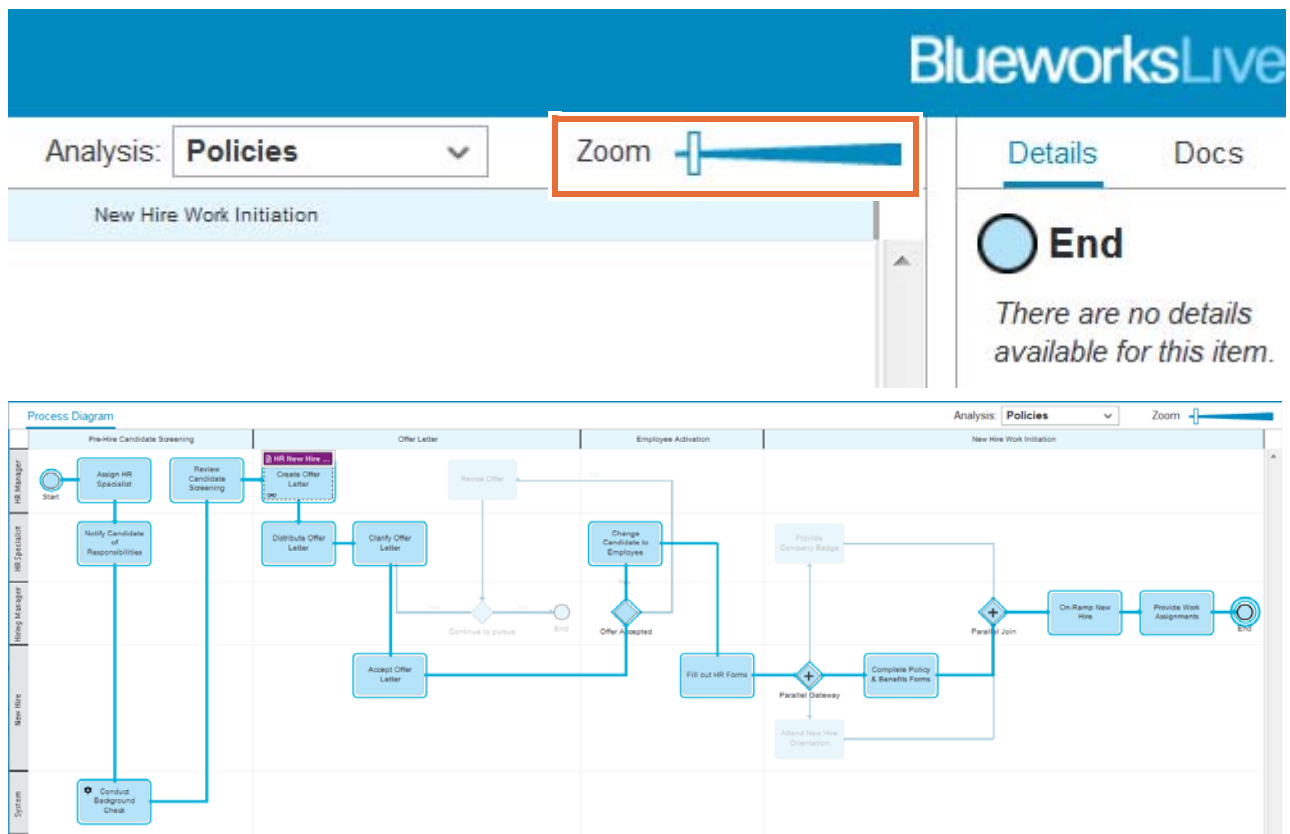
Notice that a *Split* gateway has three expected activities, not just the one element as you chose for your first Playback path. You are unable to click the other two activities to demonstrate the parallel tasks, which might cause confusion during the Playback session. Two suggestions to handle any confusion that arises are as follows:

- Be prepared to mention the two extra tasks that are completed in the split gateway path even though they are dimmed in the diagram.
- Create a second and third **Playback** path with each of the remaining split gateway elements. Name them *Expected Path 2* and *Expected Path 3* to signify that they are part of the happy path for the process.

Either solution works for the session, but the important thing to remember is to mention any split and join gateway tasks as parallel development and not conditional.

- ___ g. Continue to click all the activities in the path until you reach the **End** event.

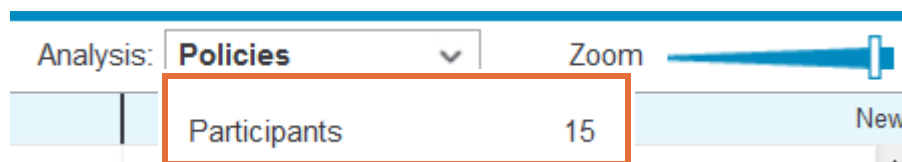
- ___ h. To view the entire path, click once on the **Zoom** slider and drag the slider to the left until the entire diagram is visible.



- ___ i. Return the **Zoom** slider to the far right.

Information

The system automatically tags every element (step) in the process diagram, and you can add your own custom tags to every element of your process. During your Playback session, you can highlight the different tags to show the session attendees. Open the **Analysis** menu and select a different tag for each element. As you complete in the activity details, more options are available in this analysis menu. For example, a session attendee might want to have a quick view of inputs or outputs for the overall diagram.

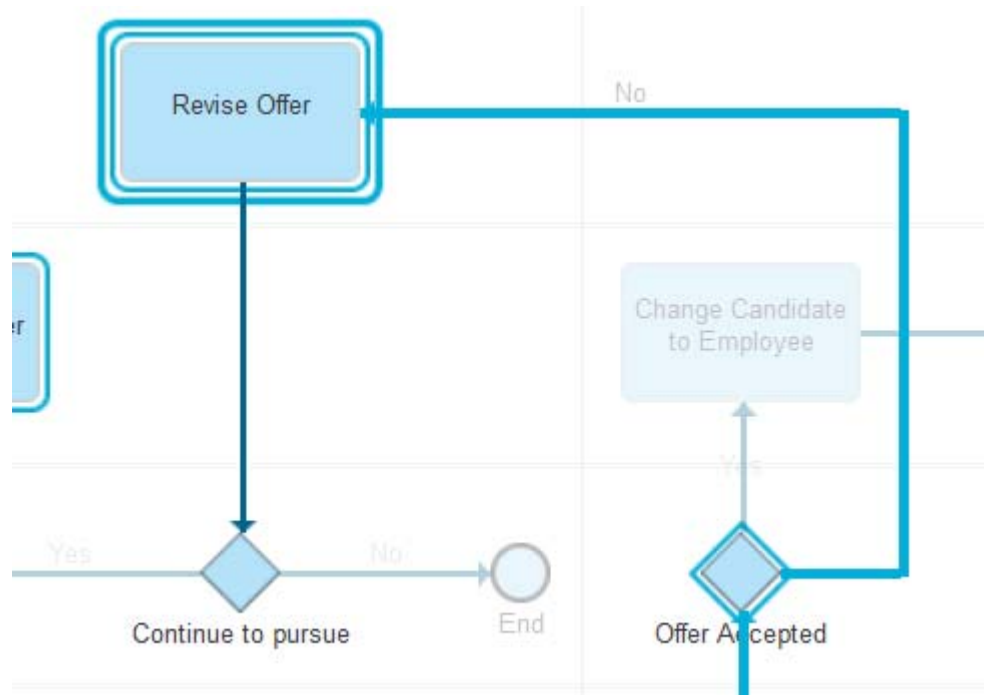


This completes the creation of the first Playback path.

- ___ 2. Create the second path.

The next path contains the exception path that is part of the process. This path covers the situation when a new hire rejects the offer and the HR Manager decides to end the hiring process.

- ___ a. Click the **circle** with the number **2** at the bottom.
- ___ b. Add the second Playback name: New Hire Rejects Offer
- ___ c. Click the **Start** event to begin the path for the second Playback.
- ___ d. Click all the activities until you arrive at the **Offer Accepted** gateway.
- ___ e. Click the **Revise Offer** activity.



- ___ f. Click the **Continue to pursue** gateway, and then click the End event on the flow labeled No. The second Playback path is complete and ready for review.

Part 3: Challenge exercise

You might have other process paths in the “To-Be” process diagram. Take the time to study the model and decide what other Playback paths can be established by using the same methods that are described in parts 1 and 2.

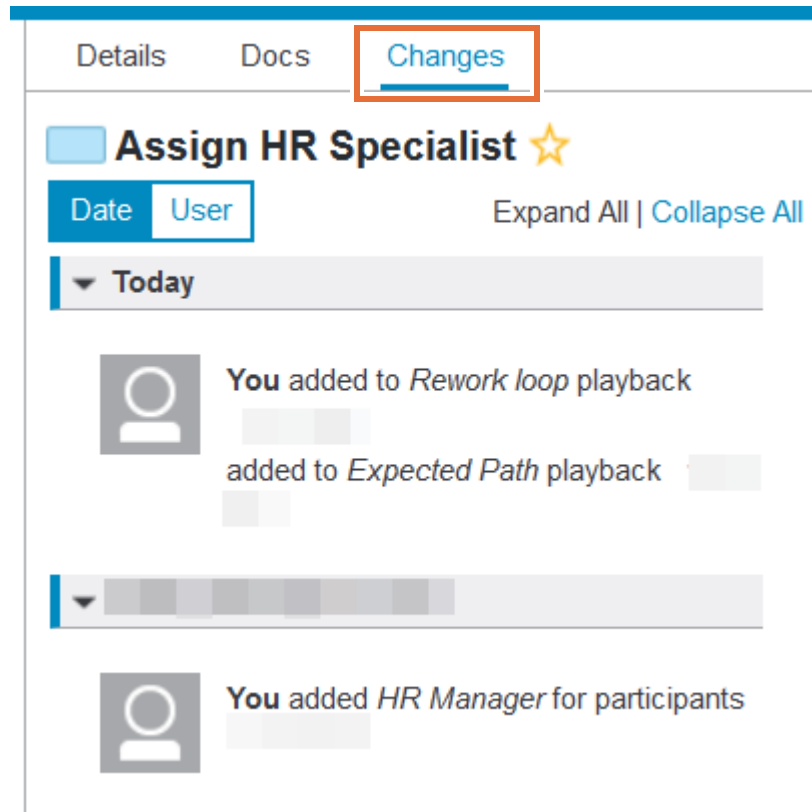
Part 4: Conduct a Playback of the process diagram

- ___ 1. Conduct the first Playback.
 - ___ a. Click the **1** circle at the bottom of the Playback interface.

- ___ b. Click the **Play** button on the controller.



- ___ c. Click the **Next** button on the controller to go to the first activity after the **Start** event.
- ___ d. The activity details for the **Identify Candidate** linked process activity are in the **Details** pane on the right side of the interface.
- ___ e. Click the **Changes** tab to view the changes that are made to this activity.



Information

If you attached any documents to this activity, click the **Docs** tab to view them.

- ___ f. Click the **Details** tab to return to the process activity details information.

- ___ g. On the **Assign HR Specialist** activity, on the bottom of the Details tab, click **Add Comment** to capture comments from Playback session attendees during the Playback session.
- ___ h. Add the comment for the **Assign HR Specialist** process activity: The lead BPM developer thinks this activity can be automated by the system in a round-robin assignment pattern. Click **Add Comment** to complete the addition.



Information

Comments are attached to the activity and are accessible to authors who analyze the process diagram for improvement.

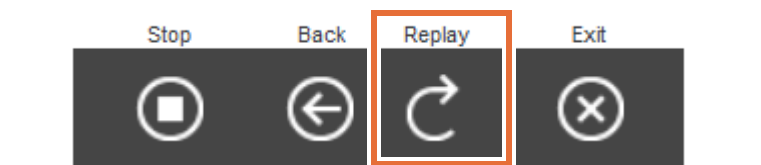
- ___ i. Continue to click the **Next** button until you reach the last element in the Playback path, the **End** event.



Note

The process details appear for each element in the Playback path. This method of conducting a Playback allows the session facilitator to focus on each element for the amount of time necessary to evaluate the details for each. If necessary, the facilitator can click an element in the process diagram to review the details for each activity independent of the controller.

The controller changes when the last element in the Playback path is reached. The **Next** button changes to a **Replay** button. If the **Replay** button is clicked, the entire Playback path reverts to the first element in the path.



- ___ j. Click the **Stop** button to end the first Playback.

- ___ 2. Conduct the second Playback.
 - ___ a. Click the **2** circle at the bottom of the **Playback** interface.
 - ___ b. Click the **Play** button on the controller.
 - ___ c. Click the **Next** button to review each element in the New Hire Rejects Offer path.

Exercise review and wrap-up

In the first part of the exercise, you used the social features of the product to collaborate on the process diagram. Then, you created the Playback paths. Finally, you played back both the expected path and an exception path.

Part 5: Challenge exercise (optional)

- ___ 1. Create a second version of the “To-Be” process model. Use the notes that you took as part of the optional exercise steps to further optimize your process.
 - ___ a. Create a **snapshot** of your process.
 - ___ b. Modify your process model and add any subprocesses and linked processes that enhance the clarity of the top-level process.
 - ___ c. Add rework loops and gateways to the process. Consider ways that you might improve the overall process where efficiencies might be introduced.
 - ___ d. Review your candidates for automation to the process, and replace user tasks with system tasks. Review your value-add analysis to help identify candidates for automation.
 - ___ e. Add documentation to every element in your process, including activities and milestones. Document inputs and outputs, problems, comments and details, policies, projected cycle time, costs, and other details that enhance your process. Verify that the analysis menu during Playback shows your added details.



Optional

If you are in a classroom environment, as soon as you complete this exercise, compare and contrast the changes that you made to your model. Describe how your model achieves the overall process goals. Are there certain optimizations that should be implemented for the first iteration, and some optimizations that are targeted for the second iteration after the results from the first iteration are examined? Compare and contrast your To-Be process model to other students in the class.



IBM Training

