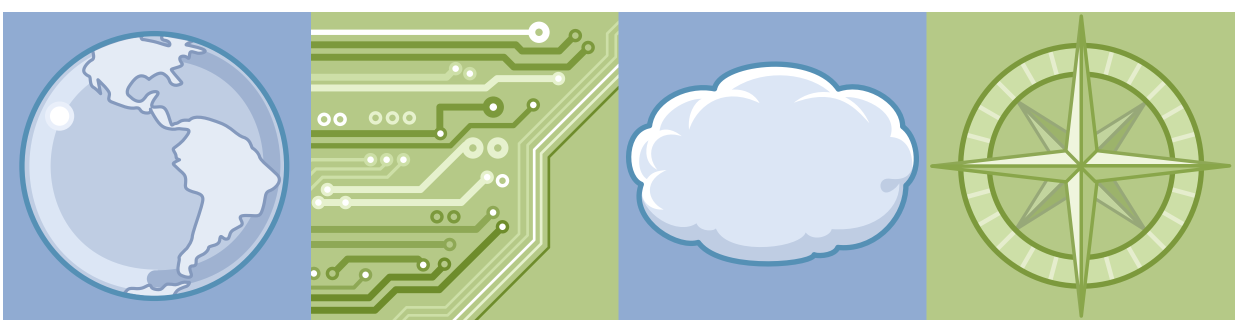
IBM Training

Student Notebook

IBM Blueworks Live Account Administration

Course code ZB030 ERC 2.0



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Contents

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Exercises description

This course includes the following exercises:

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

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

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

Exercise 1. Creating a space and managing users

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

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

Introduction

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

Requirements

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

Exercise instructions

Preface

This exercise depends on a Blueworks Live account access.

Part 1: Create a space

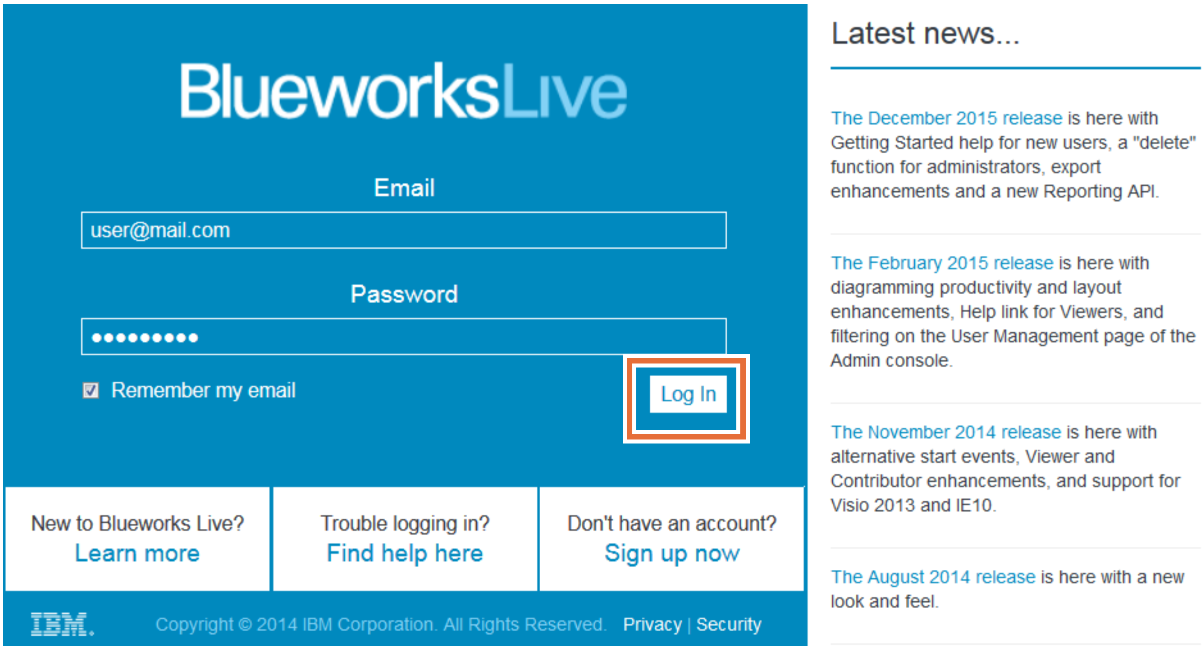
__ 1. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

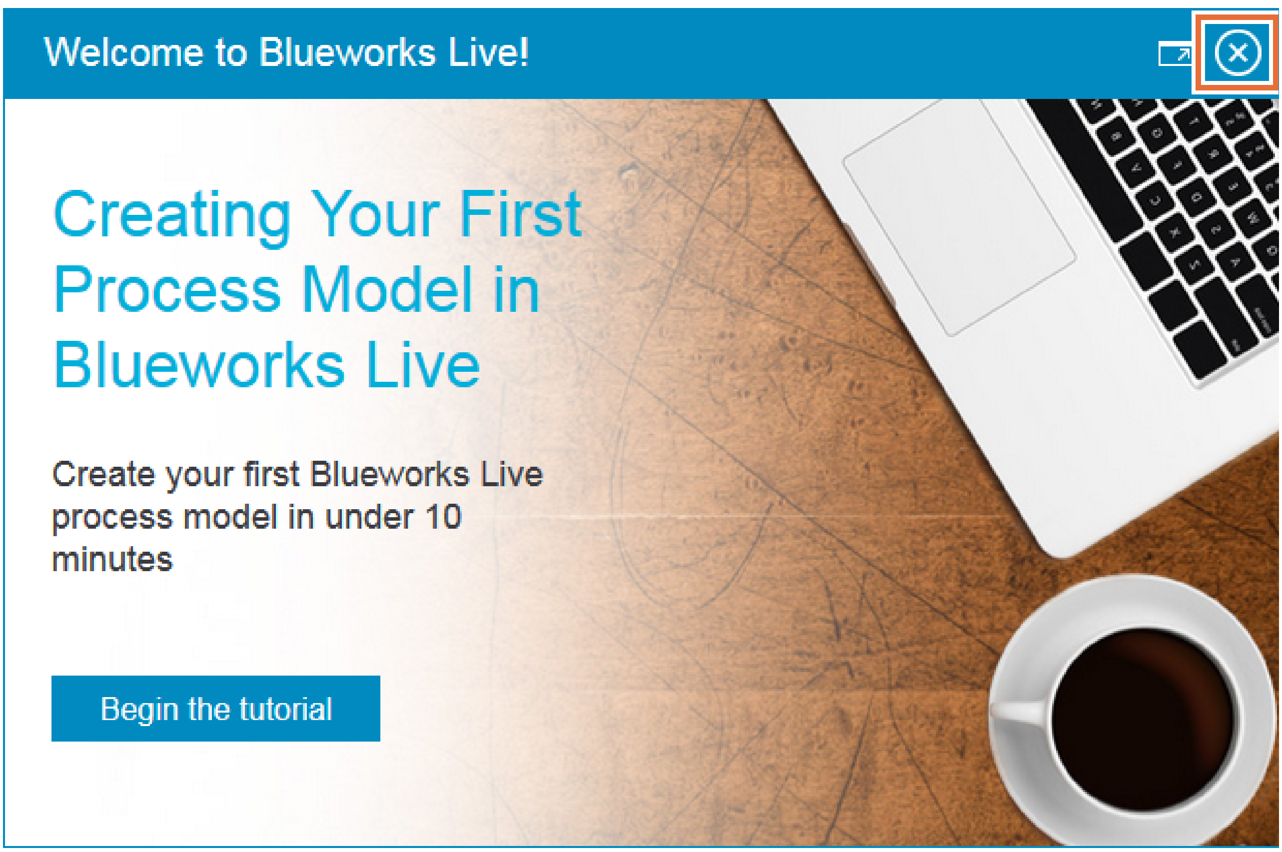
`https://www.blueworkslive.com/`

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

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



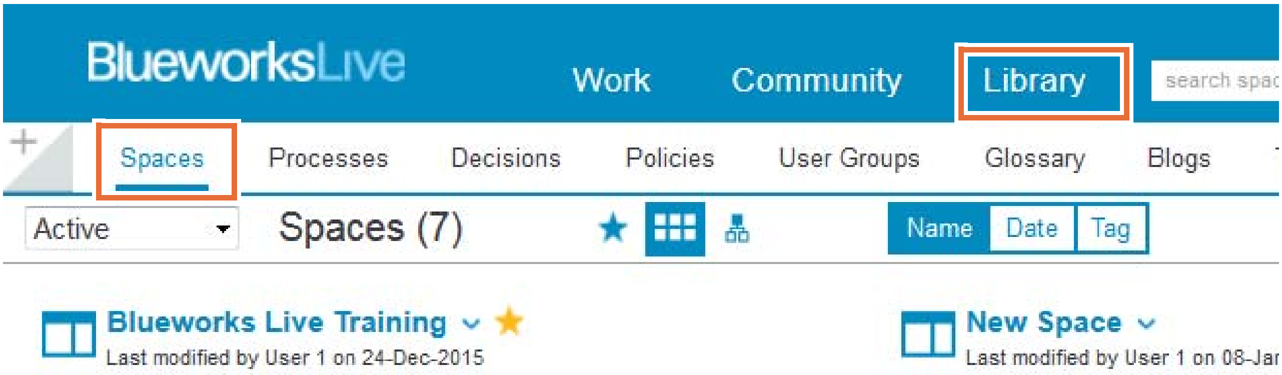
__ 2. Close the welcome screen by clicking **X** at the upper-right corner of the welcome screen.



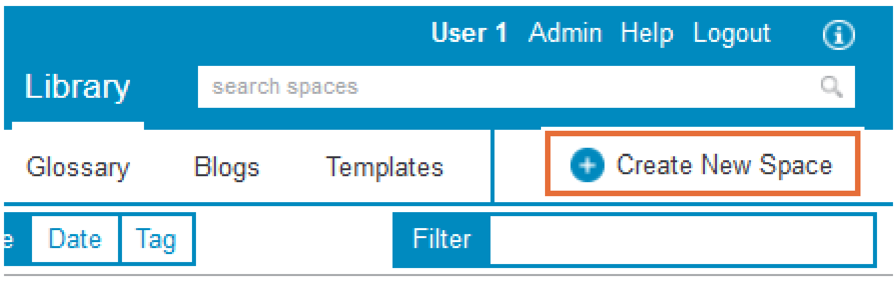
__ 3. Create a space in the Blueworks Live account space repository.

__ a. Click the **Library** tab at the top of the Blueworks Live home page.

__ b. Click the **Spaces** tab on the left side of the row of section tabs.



__ c. Click **+ Create New Space** on the right side of the page.

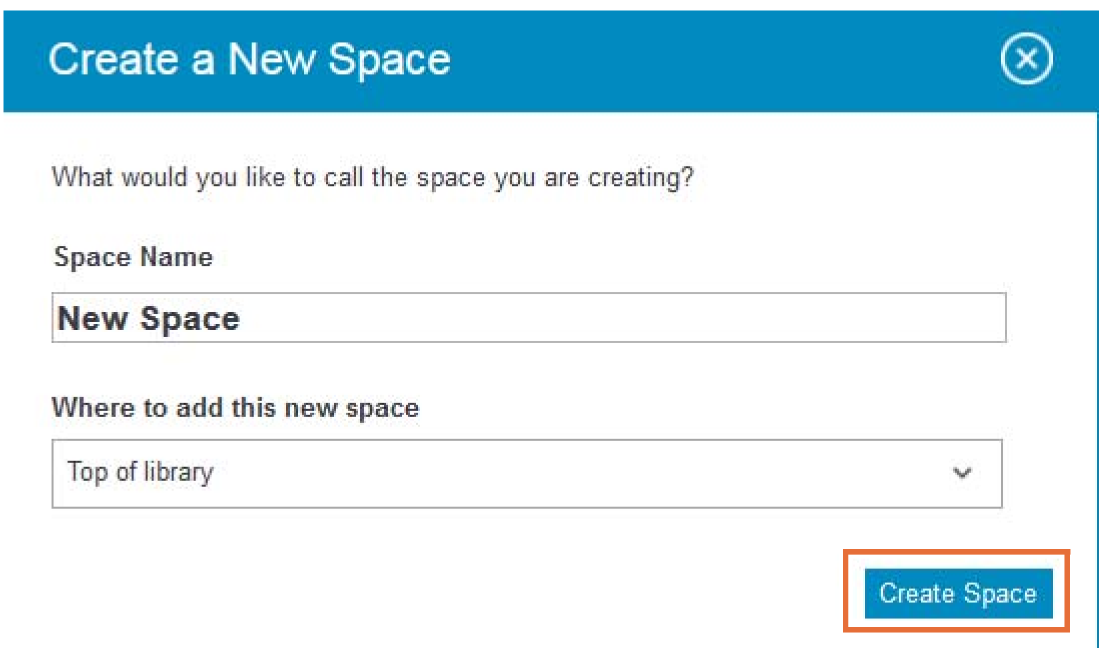


__ d. Click the **Space Name** entry in the “Create a New Space” dialog box.

__ e. Enter the name of the new space: `New Space`

__ f. Leave the default value for the **Where to add this new space** entry.

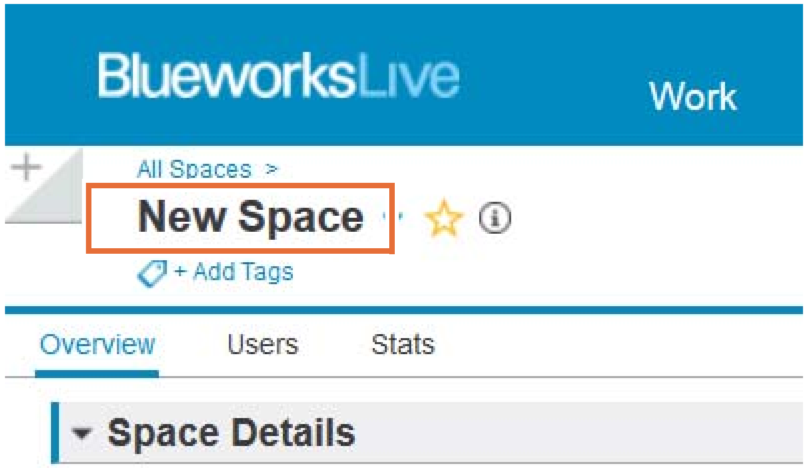
__ g. Click **Create Space** to complete the new space creation.



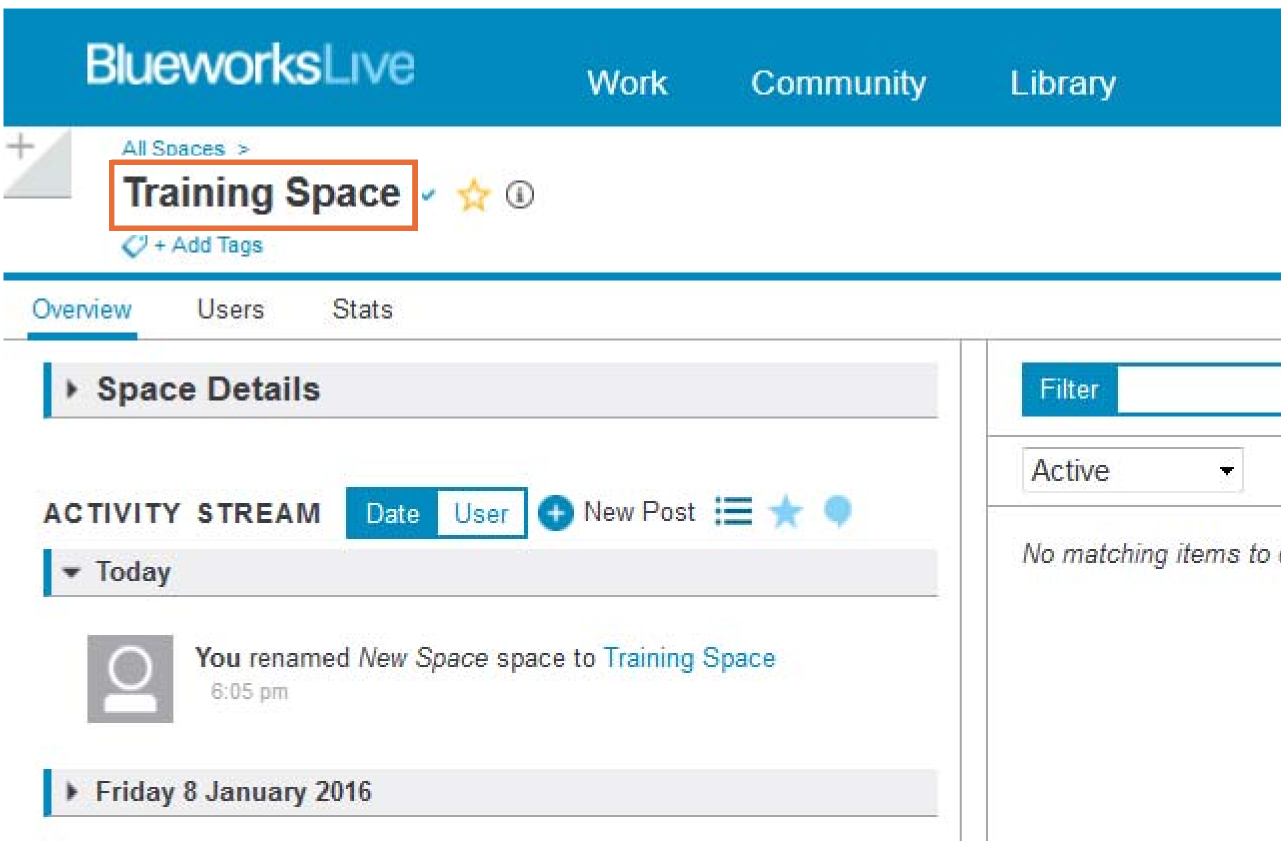
Part 2: Modify the space information

__ 1. Change the space name.

__ a. The New Space page is created. Click the name of the space to highlight the area.



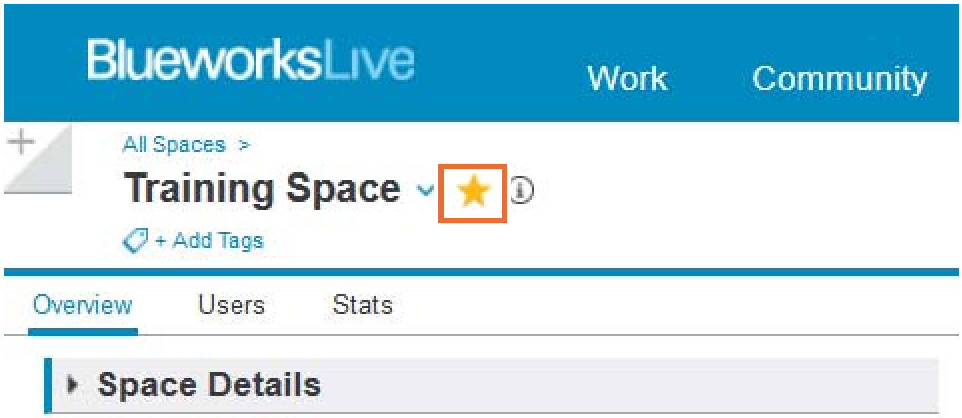
__ b. Change the name of the space to: `Training Space`



__ 2. Create the space part of the **I'm Following** space repository.

__ a. Click the star next to the space name.

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

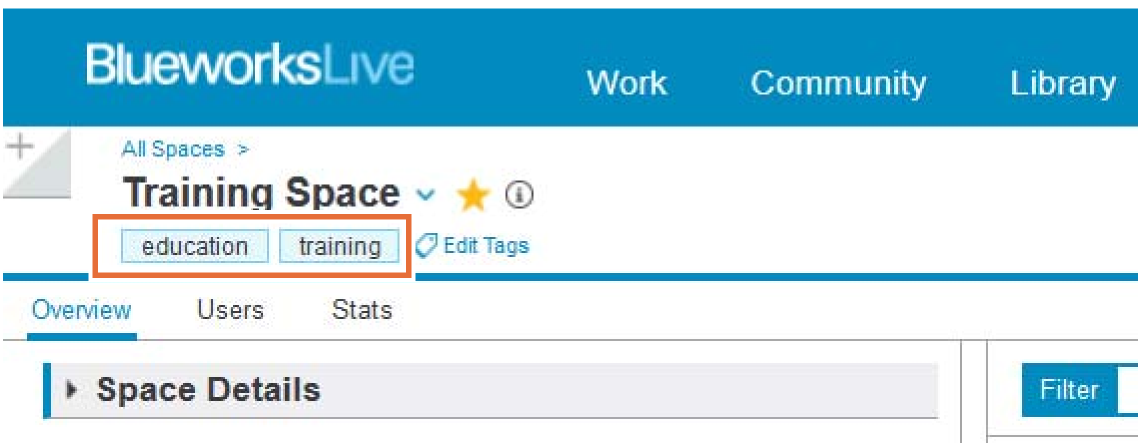


__ 3. Add tags to the space.

__ a. Click **Add Tags** below the space name.

__ b. Type `education` followed with a comma.

__ c. Type `training` in the next entry box and press Enter to finish adding tags.

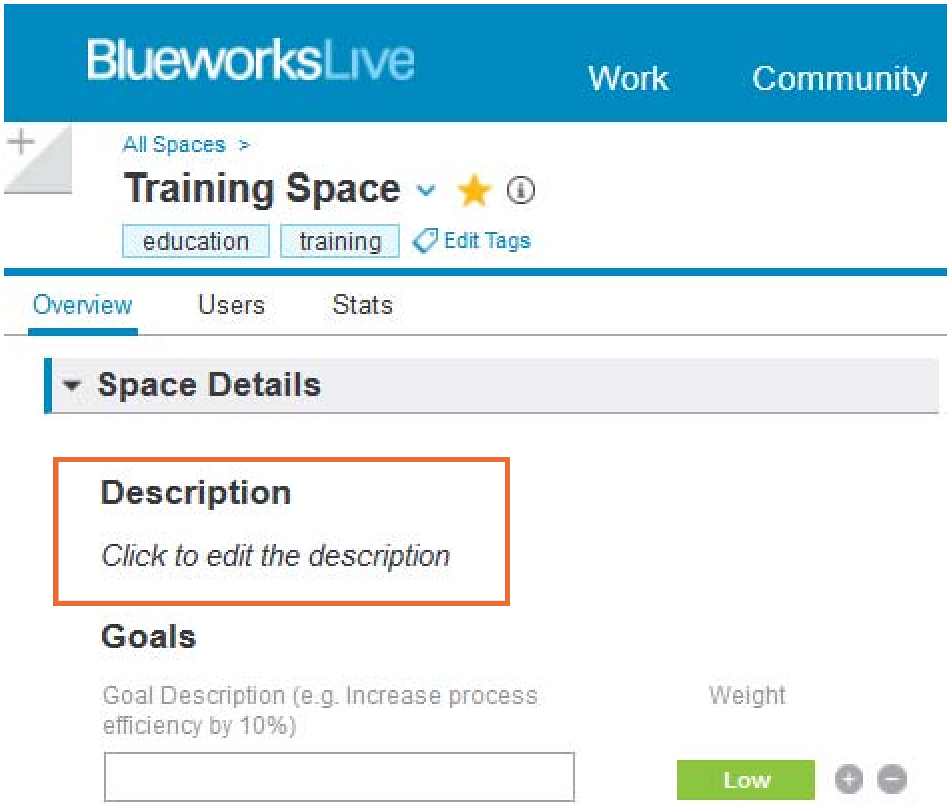


__ d. Verify the two tags for the space: *education* and *training*.

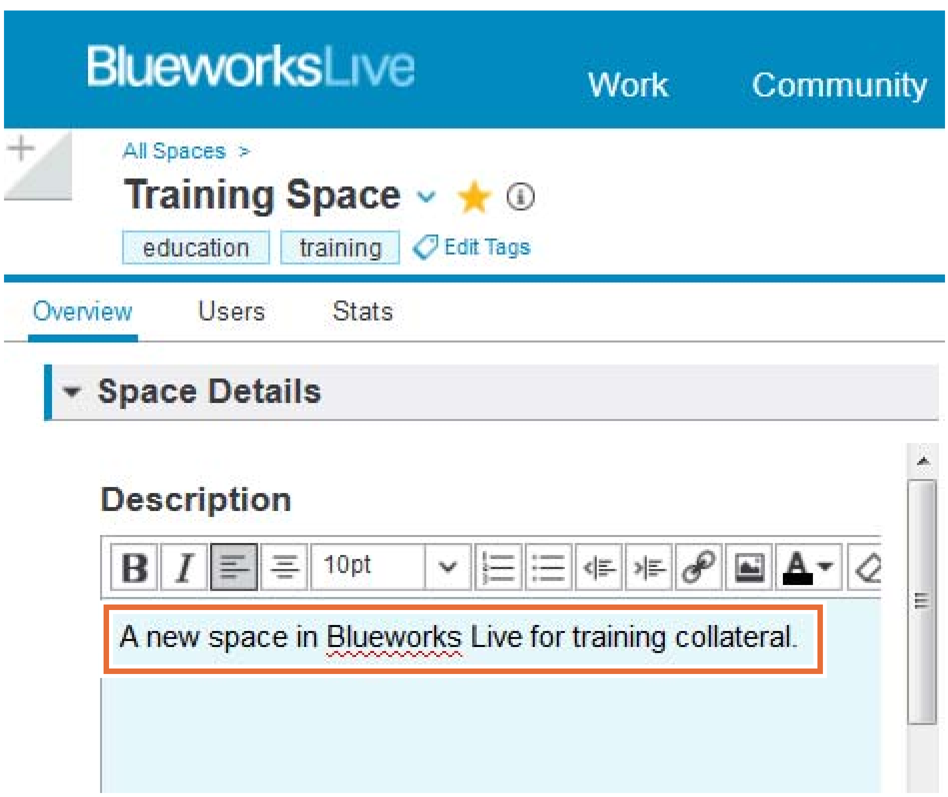
__ 4. Add details to the space.

__ a. Verify that you are in the **Overview** section of the *Training Space*.

__ b. Expand the **Space Details** section and click the **Description** area to access the editor.



__ c. Type the following description: `A new space in Blueworks Live for training collateral`.



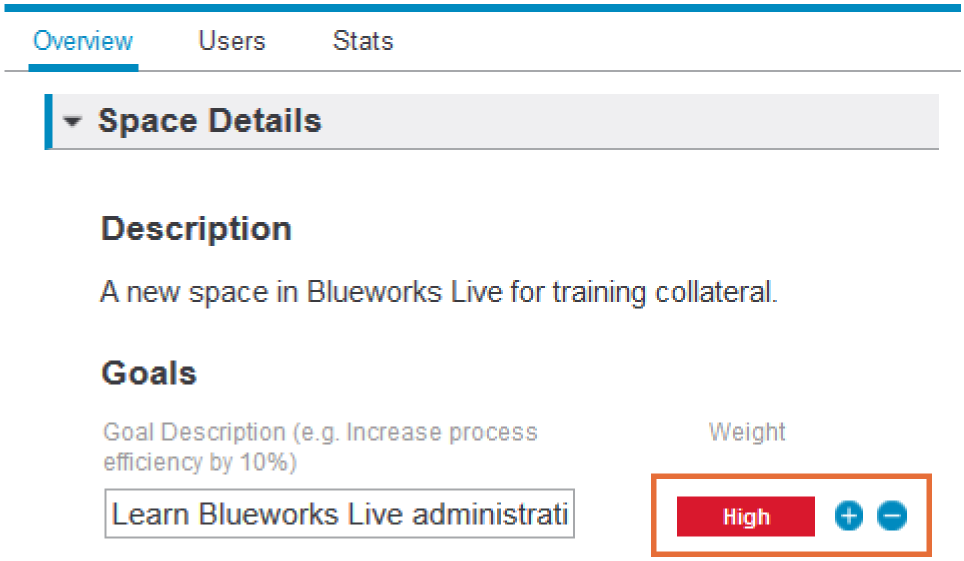
__ d. Click outside the editor to save the description.

__ 5. Add goals to the space.

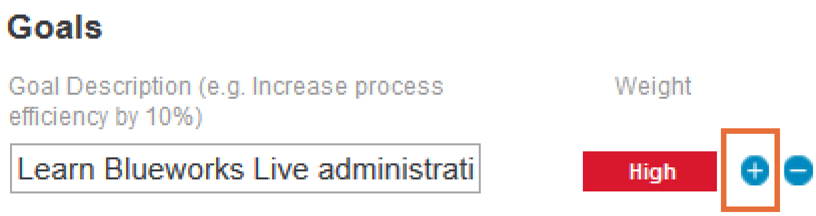
__ a. Click the **Goals** field.

__ b. Type the following goal and press Enter: `Learn Blueworks Live administration`

__ c. Click the **Weigh**t icon to the right of the entry until it is set to *High*.

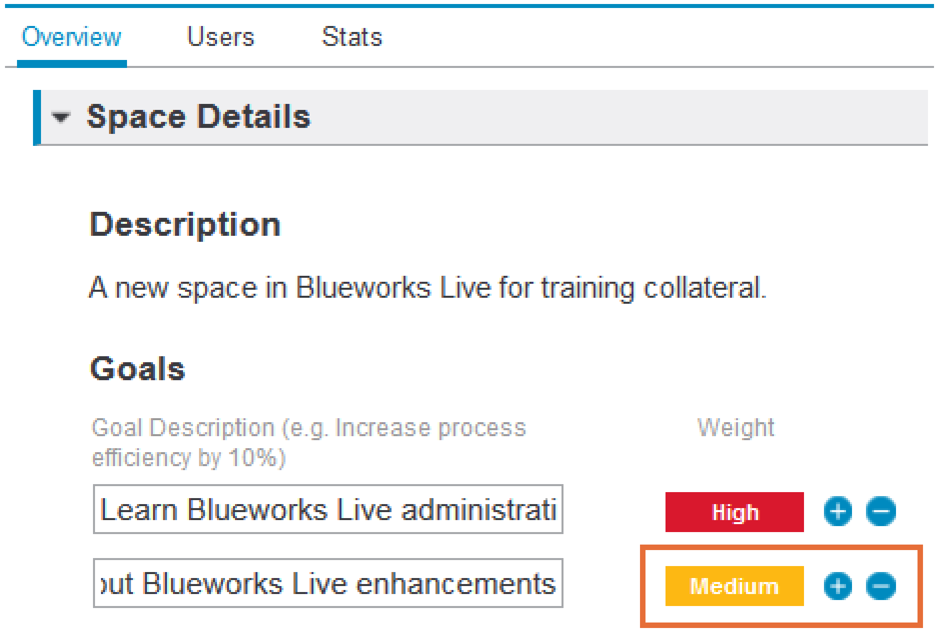


__ d. Click the **+** (plus sign) next to the weight. A new field is displayed.



__ e. Type the next goal and press Enter: `Learn about Blueworks Live enhancements`

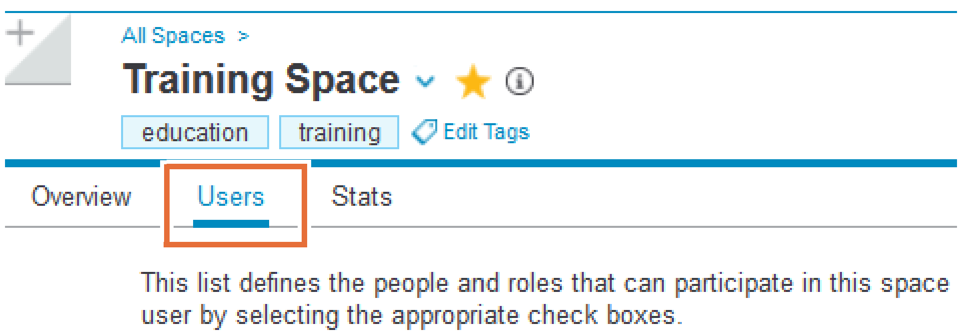
__ f. Click the **Weight** icon to the right of the entry until it is set to *Medium*.



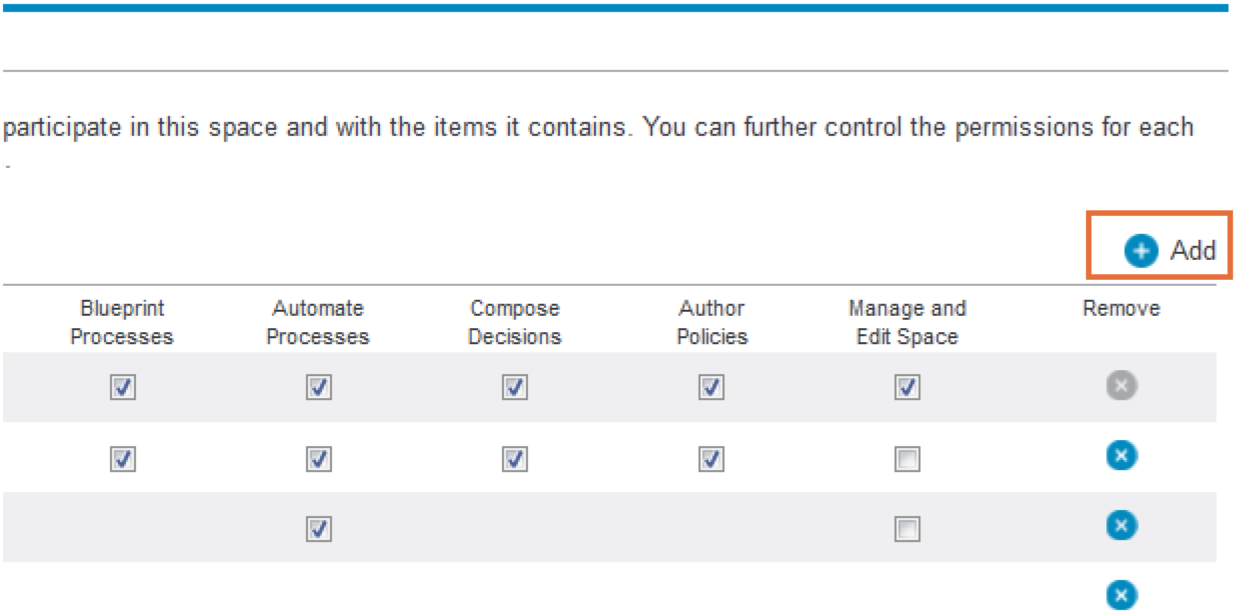
Part 3: Manage space users

__ 1. Add users to the space.

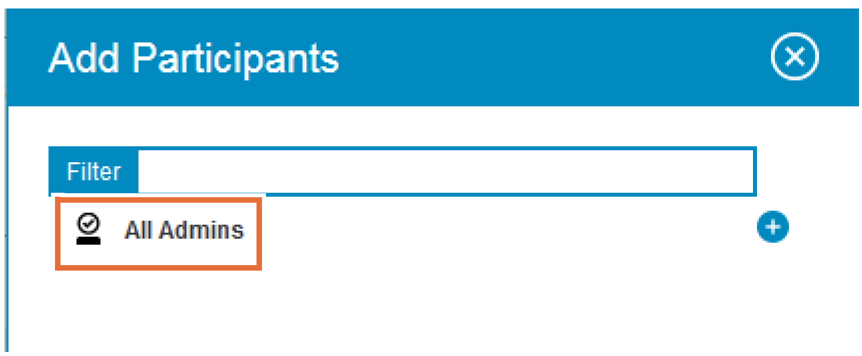
__ a. Click the **Users** tab at the top of the page.



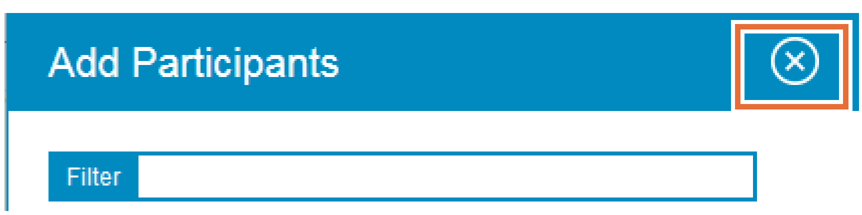
__ b. Click **+ Add** on the right side of the space participant page.



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

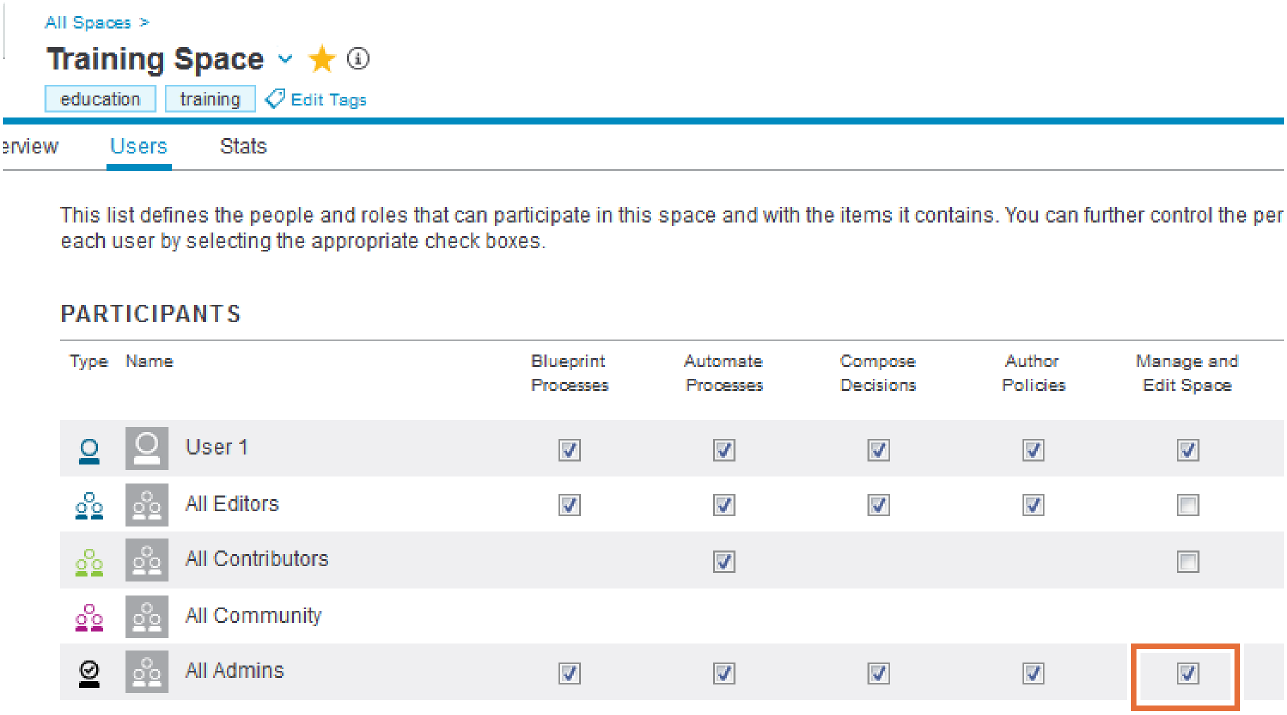


__ d. Click **X** to close the Add Participants dialog box.



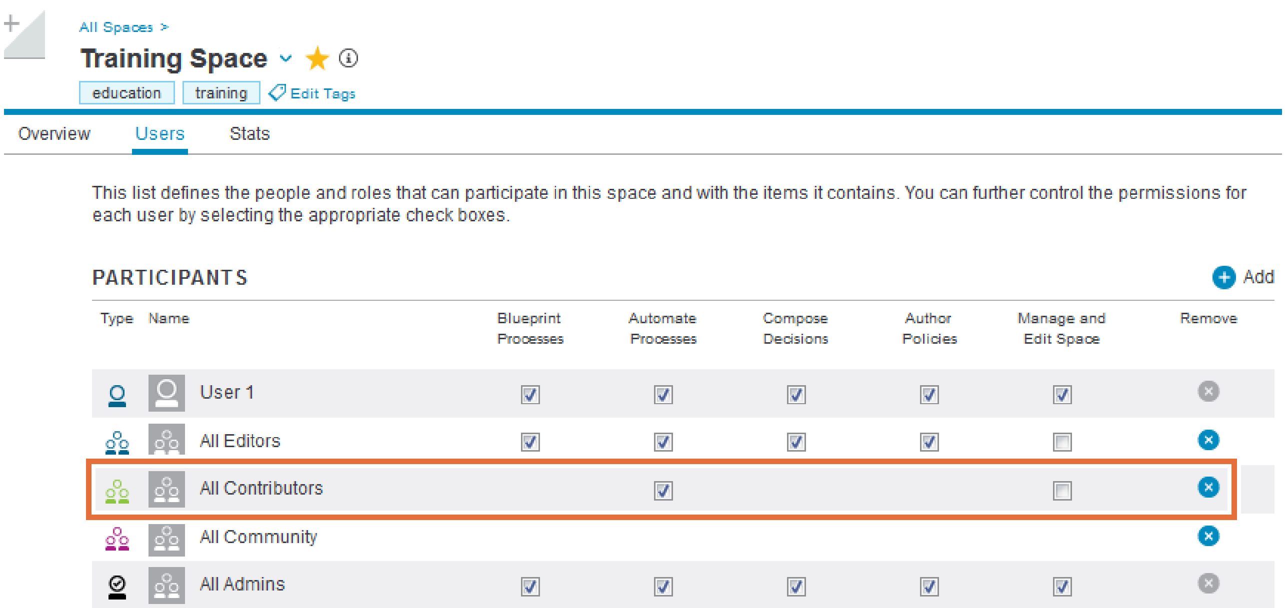
__ 2. Assign space task permissions for users.

__ a. Select the **Manage and Edit Space** check box for the All Admins participant added to the table to enable the space management task for the participant.



__ 3. Remove a user from the space.

__ a. Click the **X** icon for the **All Contributors** participant to remove it from the table.



Note

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

End of exercise

Exercise review and wrap-up

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

Exercise 2. Customizing an account

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

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

Introduction

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

Requirements

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

Exercise instructions

Preface

This exercise depends on a Blueworks Live account access.

Part 1: Set the default account preferences

Note

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

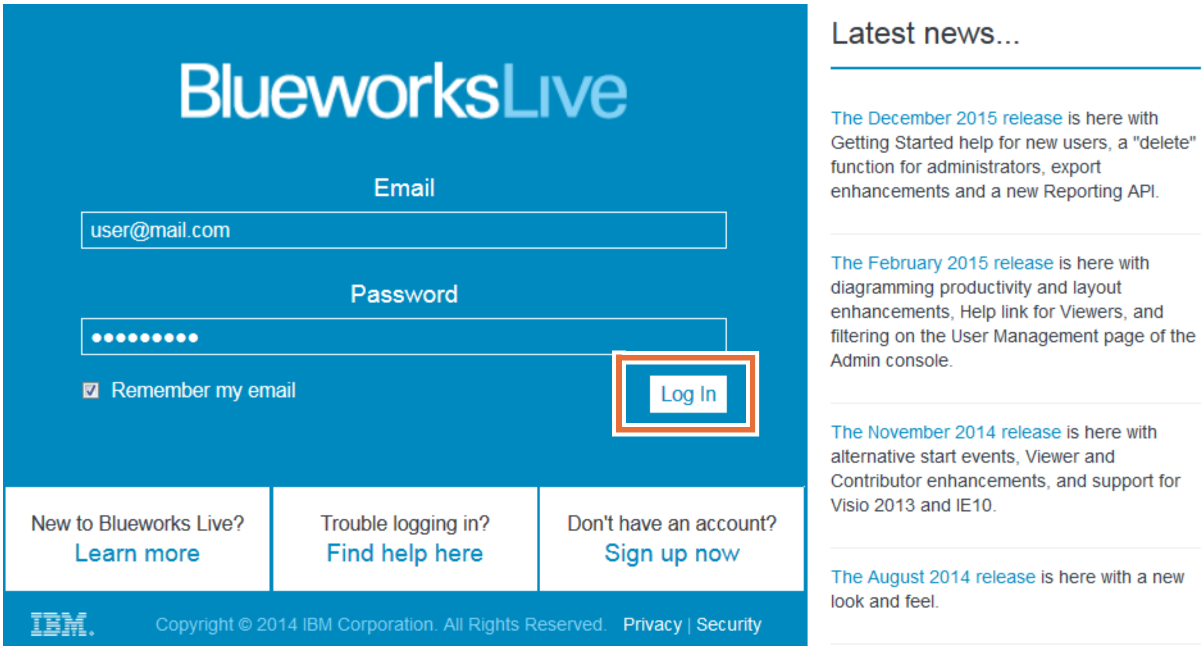
__ 1. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

`https://www.blueworkslive.com/`

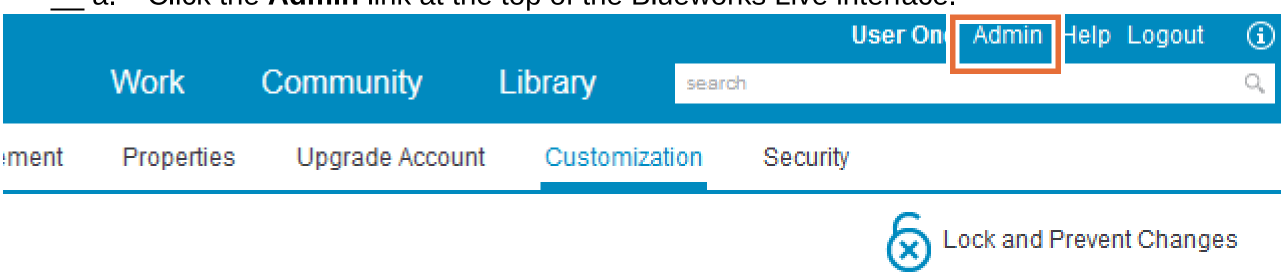
__ b. Click **Log In** on the upper-right corner of the window.

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



__ 2. Access the **Customization** section.

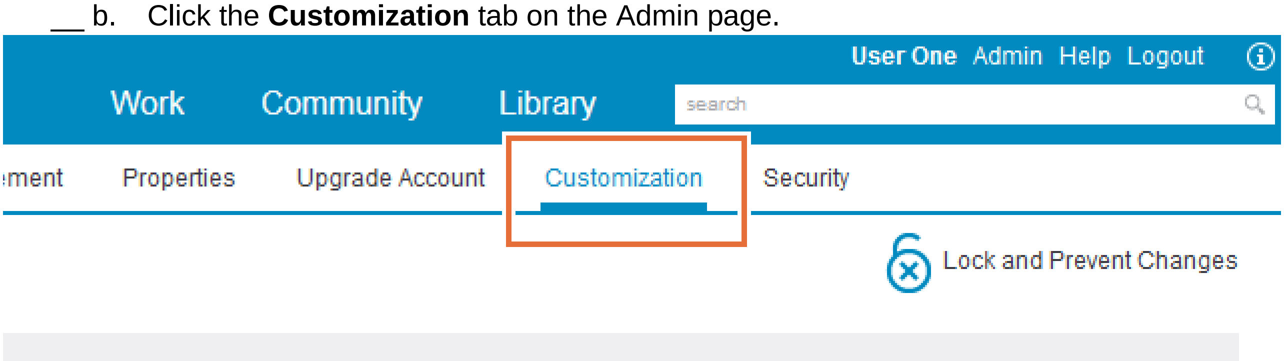
__ a. Click the **Admin** link at the top of the Blueworks Live interface.



Important

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

__ b. Click the **Customization** tab on the Admin page.



__ 3. Set the default preferences for the account.

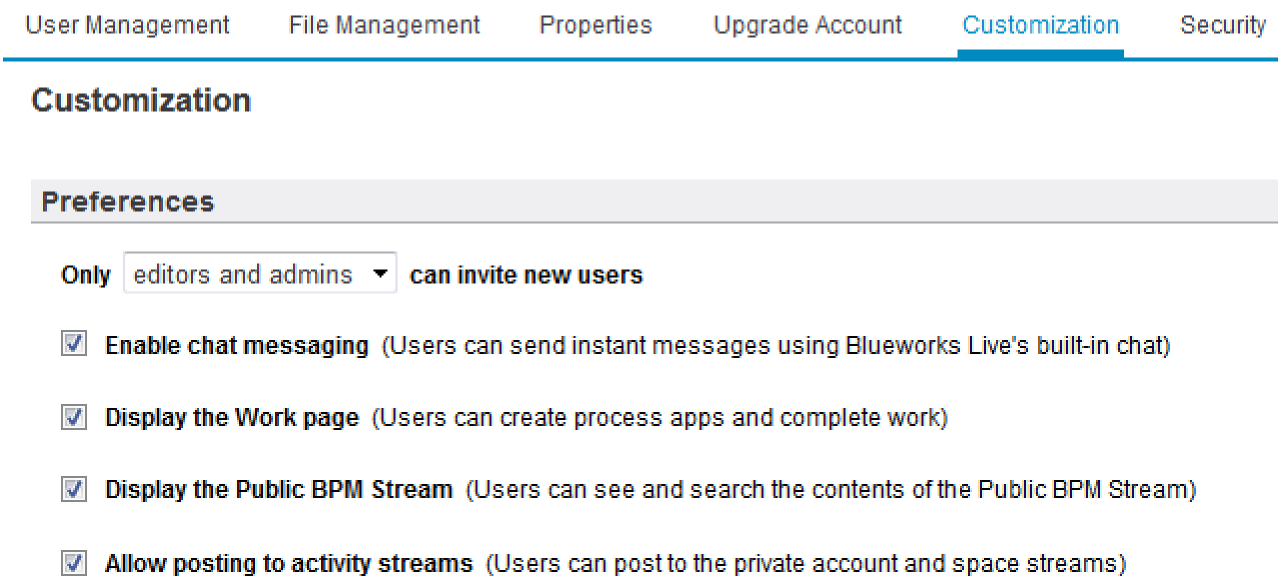
__ a. Under the **Customization > Preferences** section, select “Only **editors and admins** can invite new users”.

__ b. Verify that the **Enable chat messaging** check box is selected.

__ c. Verify that the **Display the Work page** check box is selected.

__ d. Verify that the **Display the Public BPM Stream** check box is selected.

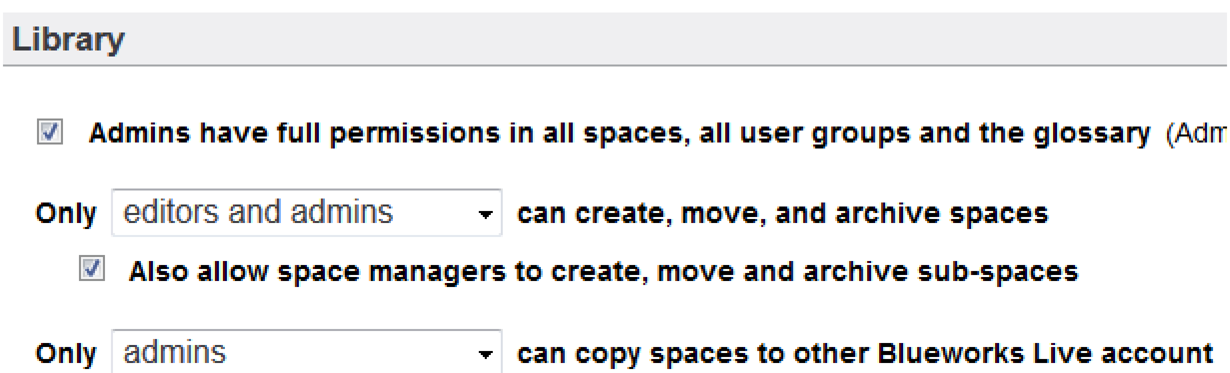
__ e. Verify that the **Allow posting to activity streams** check box is selected.



__ f. Under the **Customization > Library** section, select the **Admins have full permissions in all spaces, all user groups and the glossary** check box.

__ g. Select “Only **editors and admins** can create, move, and archive spaces”.

__ h. Select “Only **admins** can copy spaces to other Blueworks Live account”.



__ i. Verify that the default preferences are set.

Note

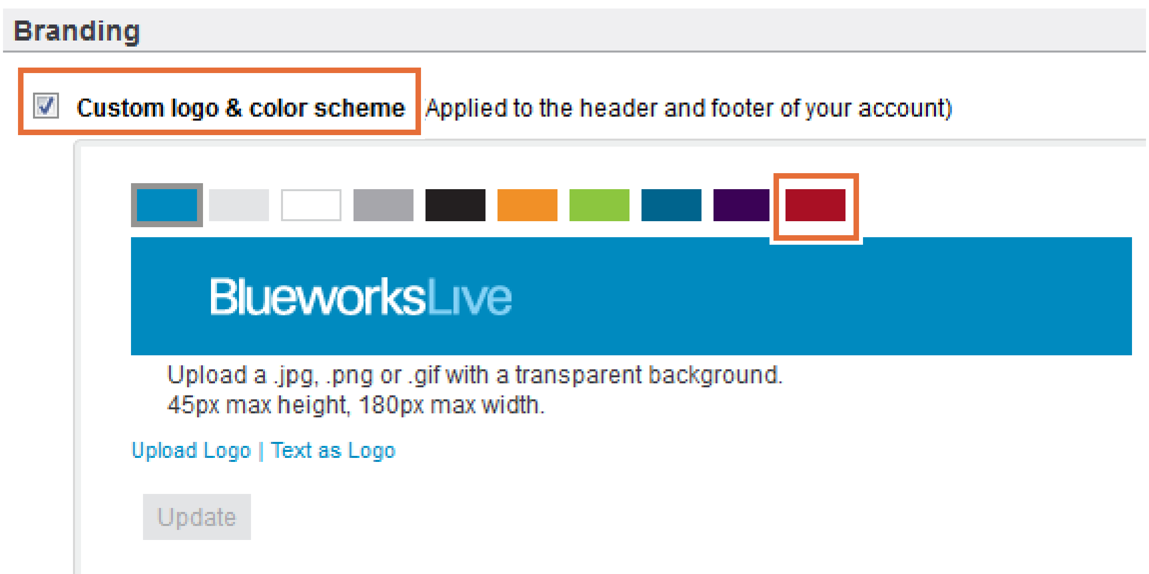
The customization changes made to the account preferences affects all users of the account. Changes can be made and revised at any time to the account preferences based on actual account need. This exercise is intended only to familiarize you with the options available.

Part 2: Brand the account

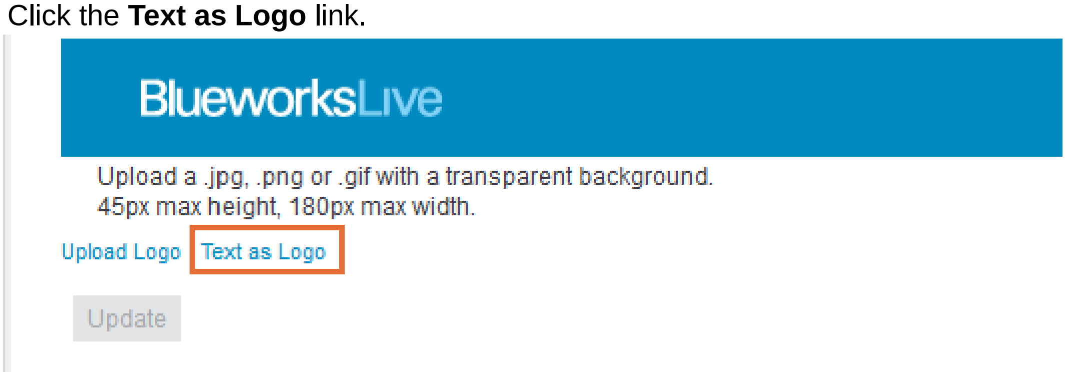
__ 1. Add a custom logo and color scheme.

__ a. Under the **Customization > Branding** section, select the **Custom logo & color scheme** check box.

__ b. Click the **red block** to change the interface color scheme.



__ c. Click the **Text as Logo** link.



__ d. Enter `My Blueworks Live` in the **Organization Name** field.

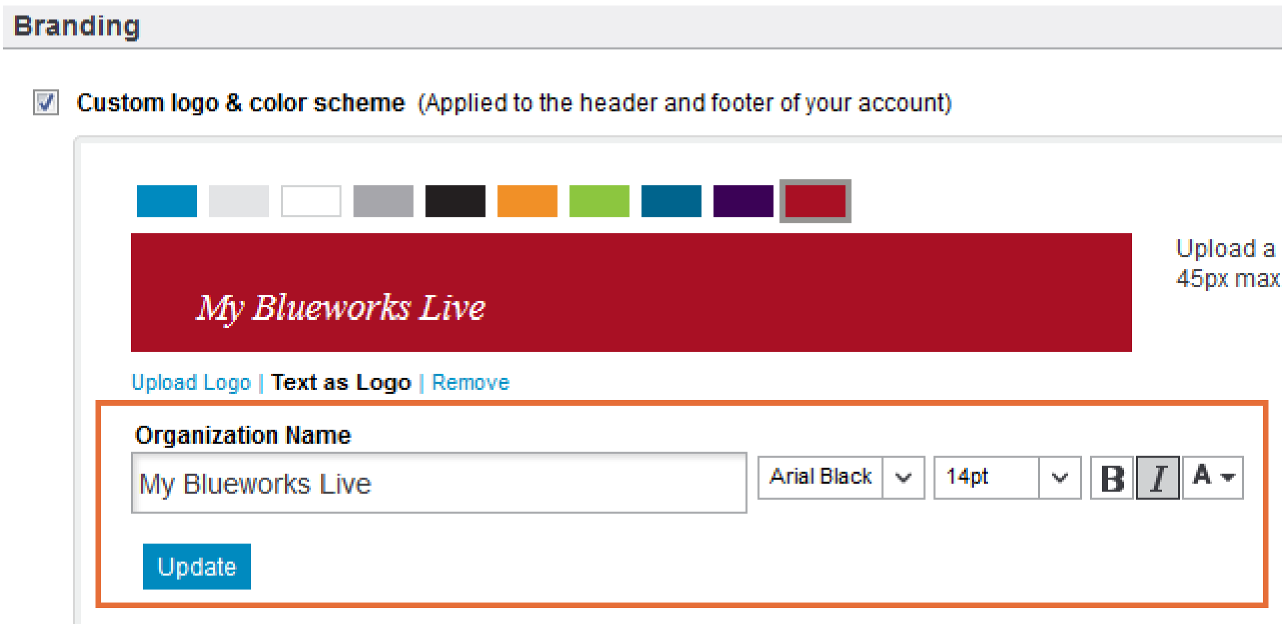
Note

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

__ e. Select **Arial Black** for the font.

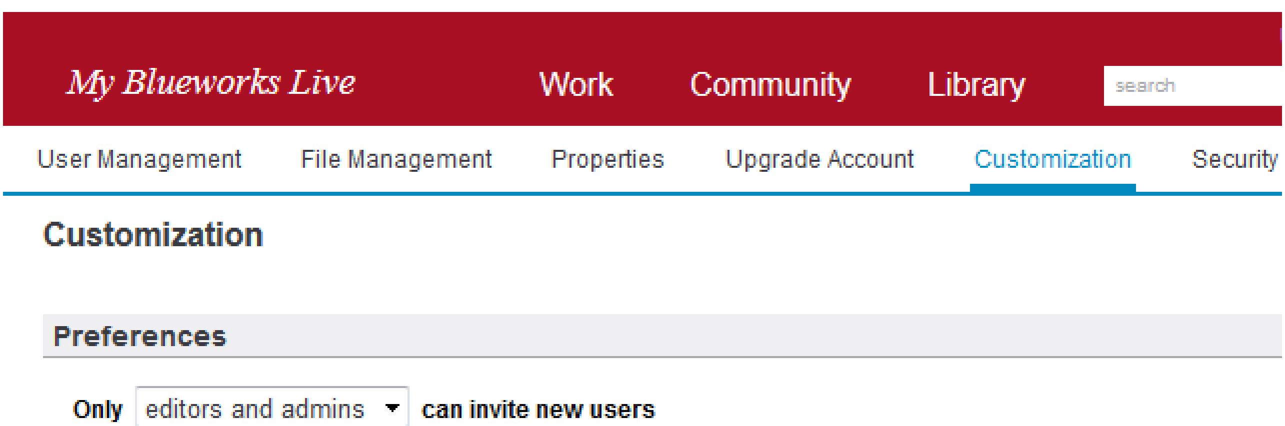
__ f. Select **14 pt** for the font size.

__ g. Click the ***I*** icon to change the font style to italic.



__ h. Click **Update** to save the changes to the logo and color scheme.

__ i. Verify that the changes are applied to the Blueworks Live account interface.



__ j. Under the **Customization > Branding** section, clear the **Custom logo & color scheme** check box to revert to the default Blueworks Live interface.

__ k. Select the **Custom logo & color scheme** check box again to enable the custom branding that was set earlier.

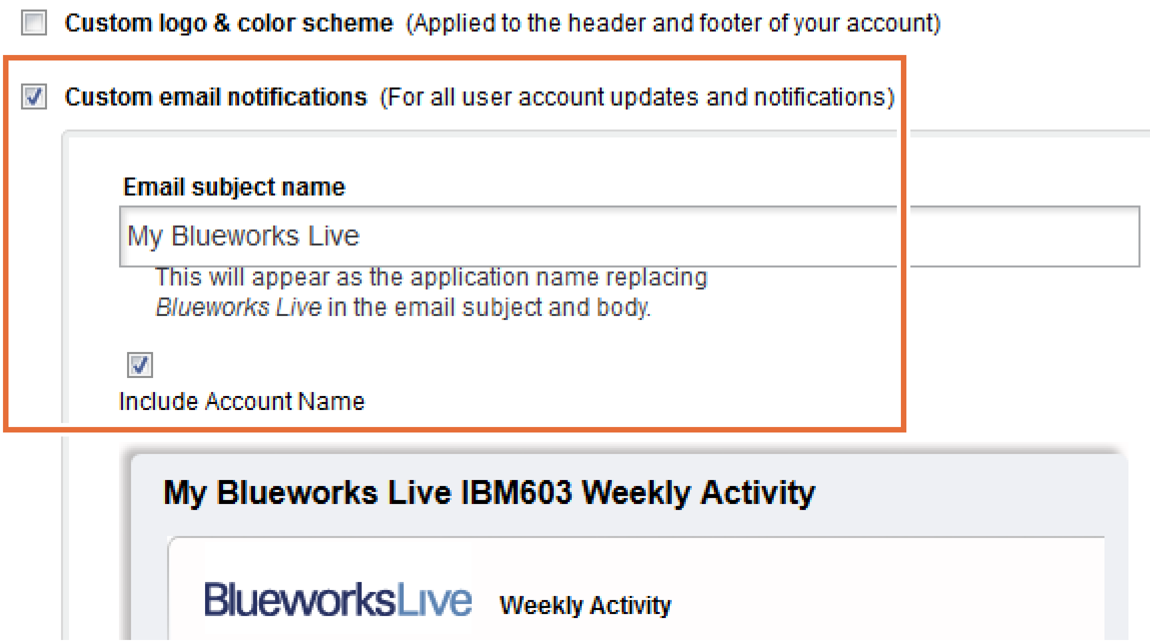
__ l. Clear the **Custom logo & color scheme** check box to clear the custom settings and revert to the default Blueworks Live interface.

__ 2. Customize the email notification.

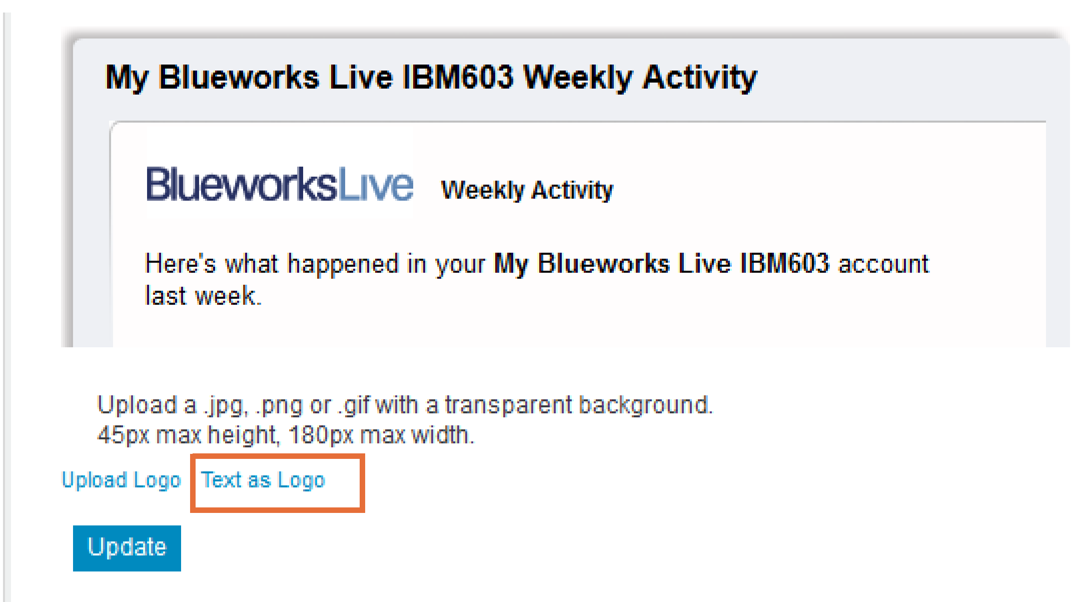
__ a. Select the **Custom email notifications** check box.

__ b. Change the email subject line to: `My Blueworks Live`

__ c. Select the **Include Account Name** check box.



__ d. Click the **Text as Logo** link.



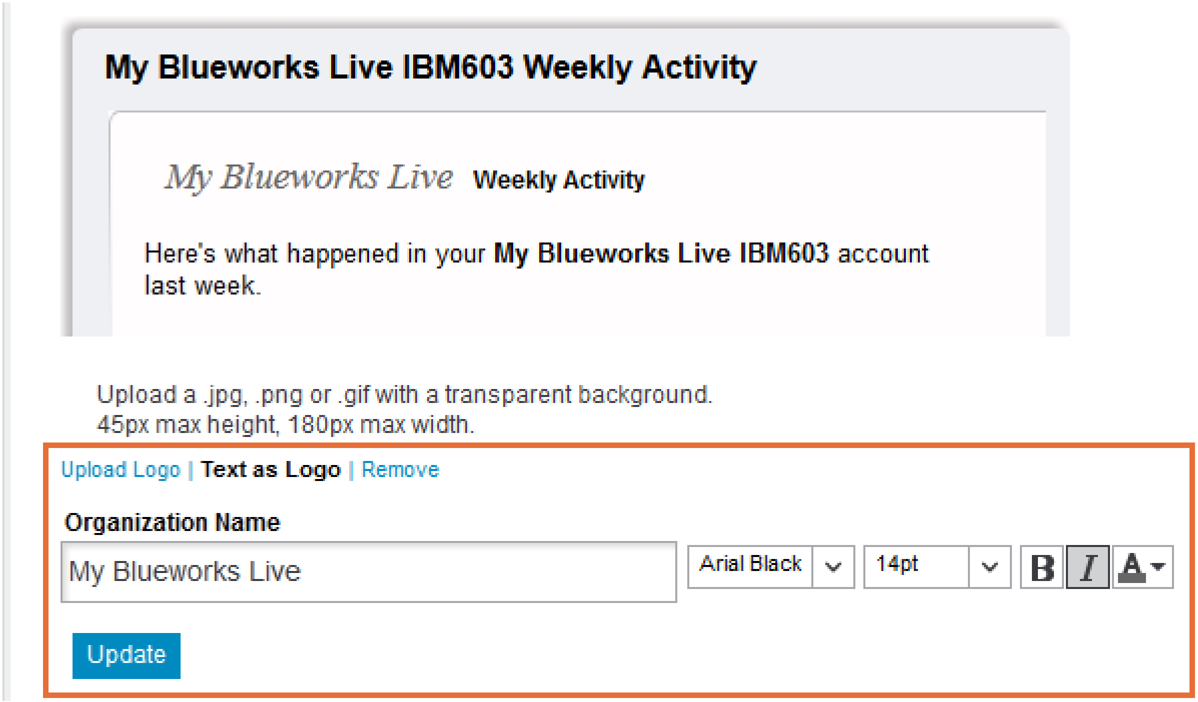
__ e. Enter `My Blueworks Live` in the **Organization Name** field.

__ f. Select **Arial Black** for the font.

__ g. Select **14 pt** for the font size.

__ h. Click the ***I*** icon to change the font style to italic.

__ i. Click **Update** to save the changes to email notification branding.



__ j. Under the **Customization > Branding** section, clear the **Custom email notifications** check box to revert to the default settings.

__ 3. Customize the logo on the Word export.

__ a. Select the **Custom logo on Word export** check box.

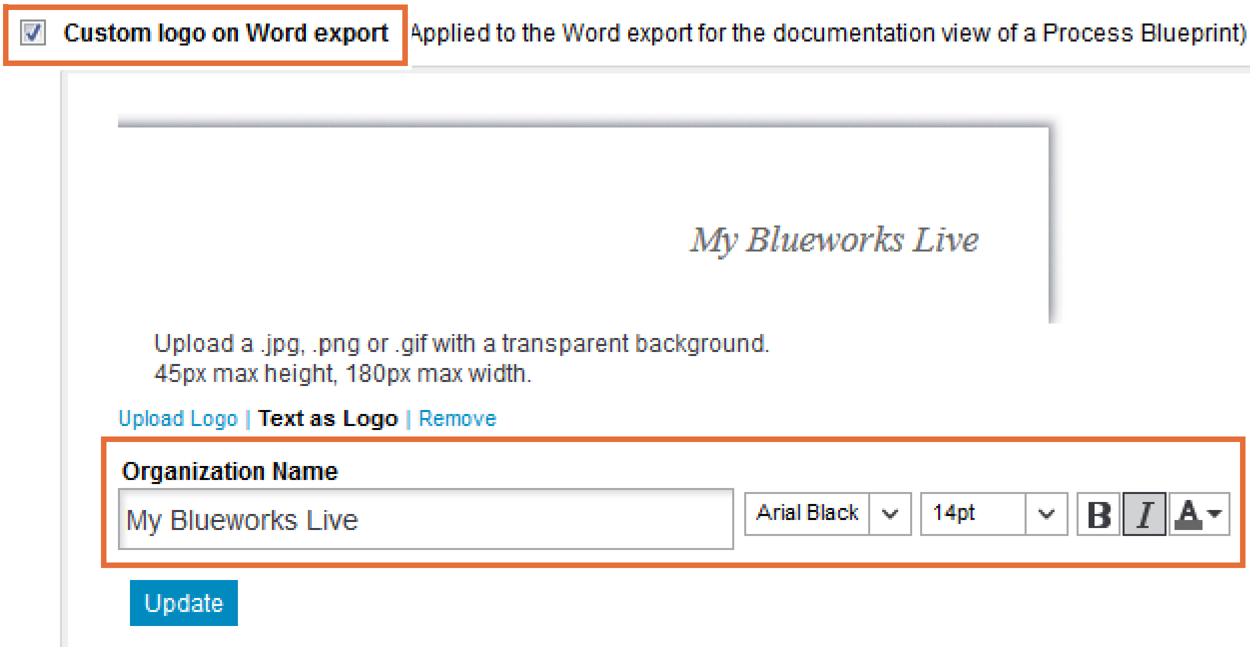
__ b. Click the **Text as Logo** link.

__ c. Enter `My Blueworks Live` in the **Organization Name** field.

__ d. Select **Arial Black** for the font.

__ e. Select **14 pt** for the font size.

__ f. Click the *I* icon to change the font style to italic.



__ g. Click **Update** to save the changes to email notification branding.

__ h. Under the **Customization > Branding** section, clear the **Custom logo on Word export** check box to revert to the default settings.

End of exercise

Exercise review and wrap-up

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

Exercise 3. Managing the glossary

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

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

Introduction

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

Requirements

This exercise requires the user permissions to modify the glossary.

Exercise instructions

Preface

This exercise depends on a Blueworks Live account access.

Part 1: Create a Blueprint process

Note

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

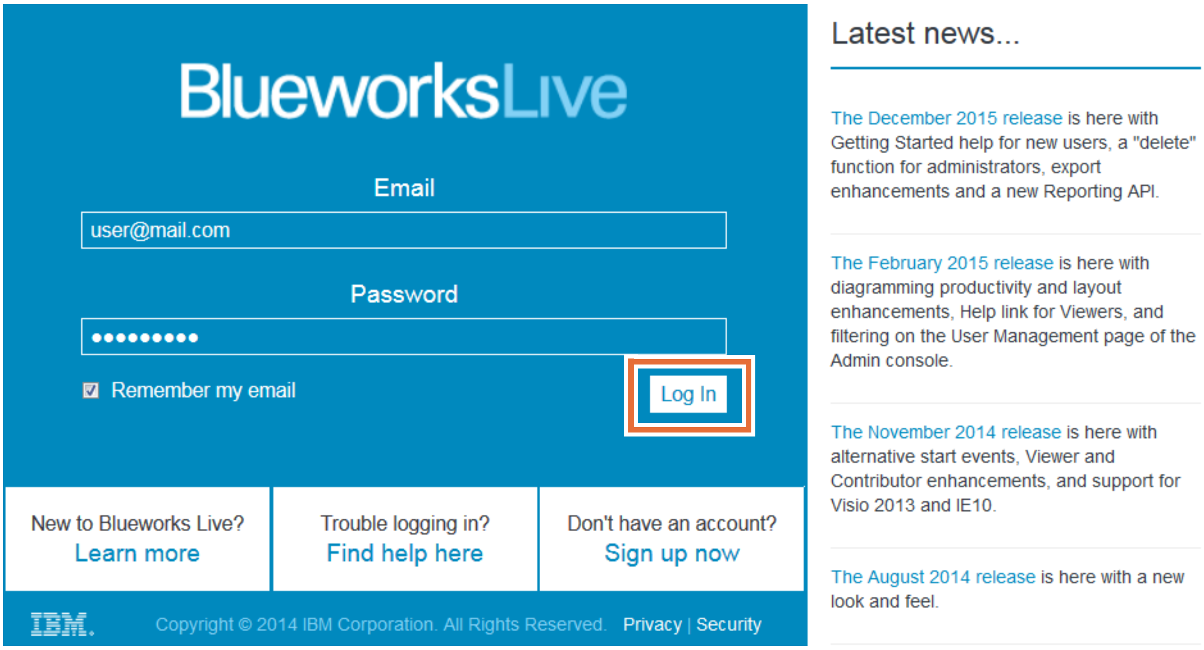
__ 1. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

`https://www.blueworkslive.com/`

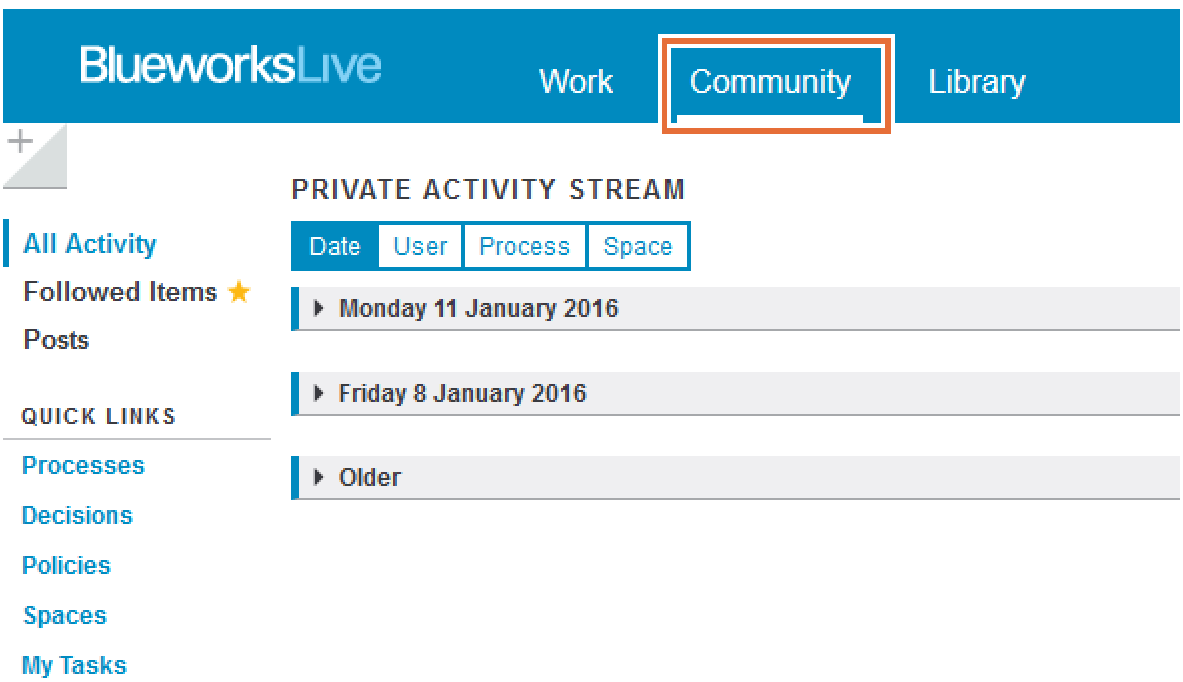
__ b. Click **Log In** on the upper-right corner of the window.

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

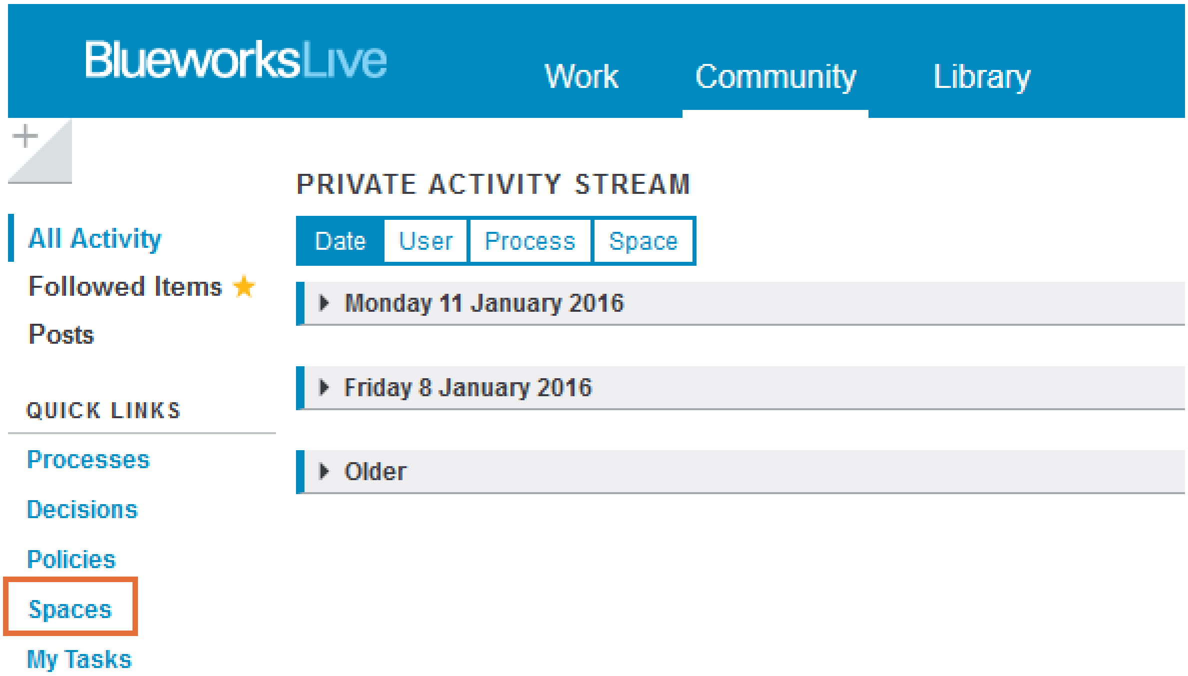


__ 2. Access the Space.

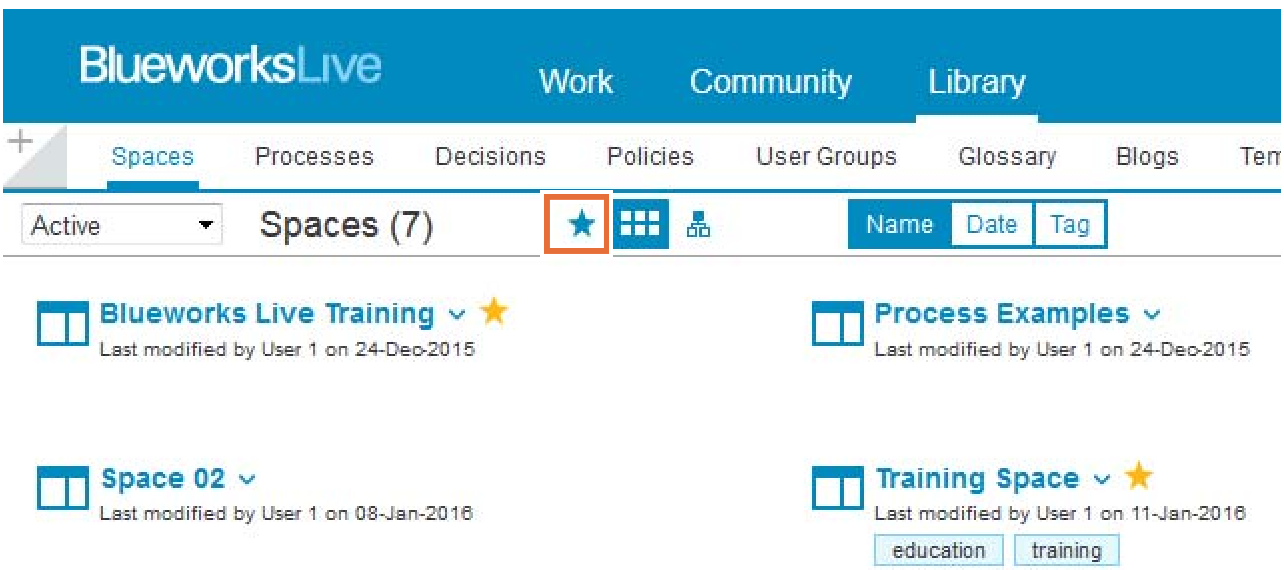
__ a. Click **Community** at the top of the Blueworks Live interface.



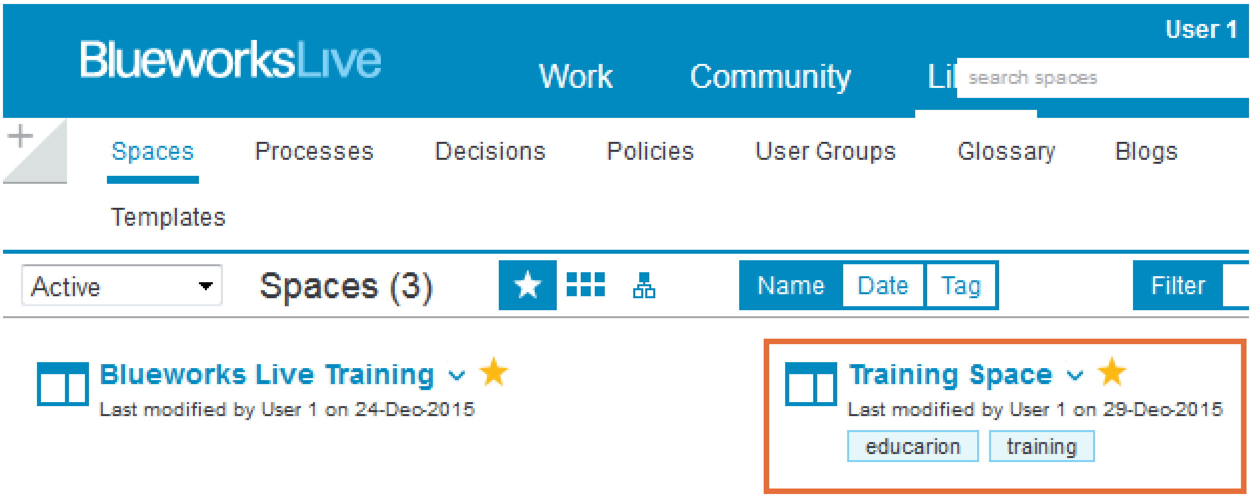
__ b. Click the **Spaces** link.



__ c. Click the star icon next to Spaces to list only the spaces you are following.



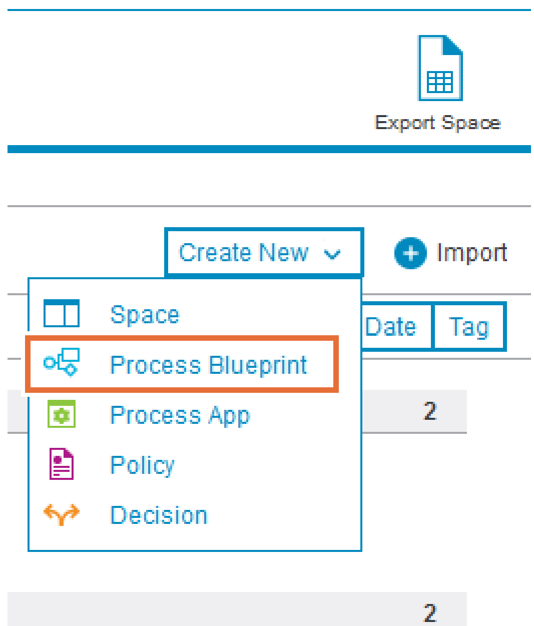
__ d. Click **Training Space**.



__ 3. Create a Process Blueprint.

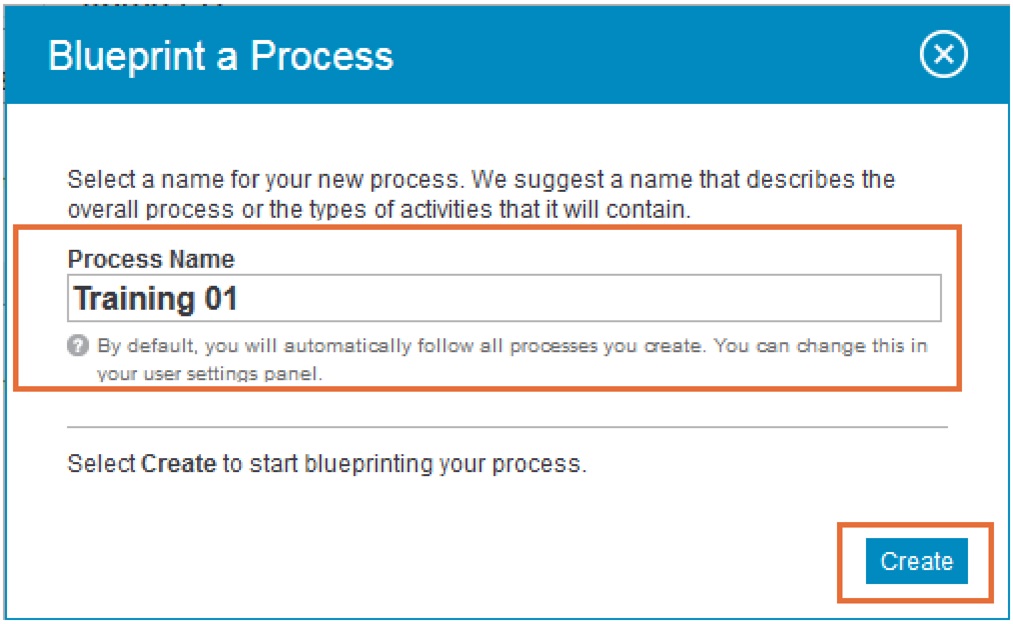
__ a. Click **Create New** on the right side of the page.

__ b. Select **Process Blueprint** from the options.

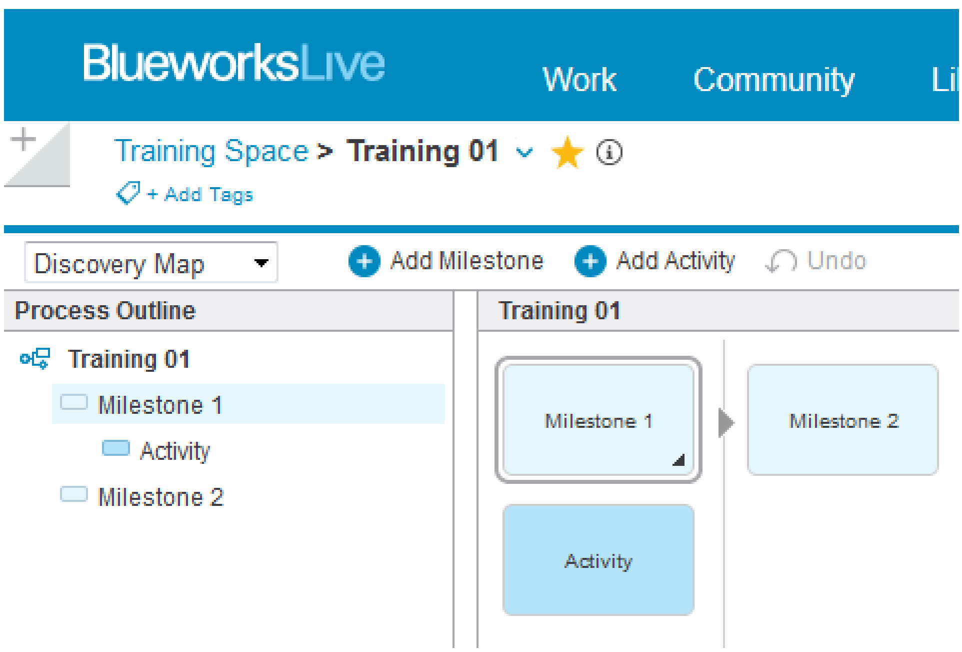


__ c. Name the process: `Training 01`

__ d. Click **Create**.

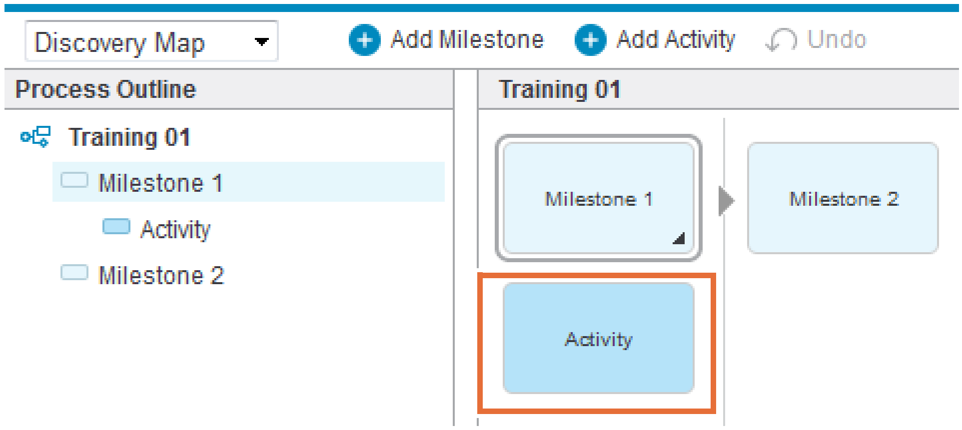


__ e. Verify that the **Discovery Map** for the process is created.

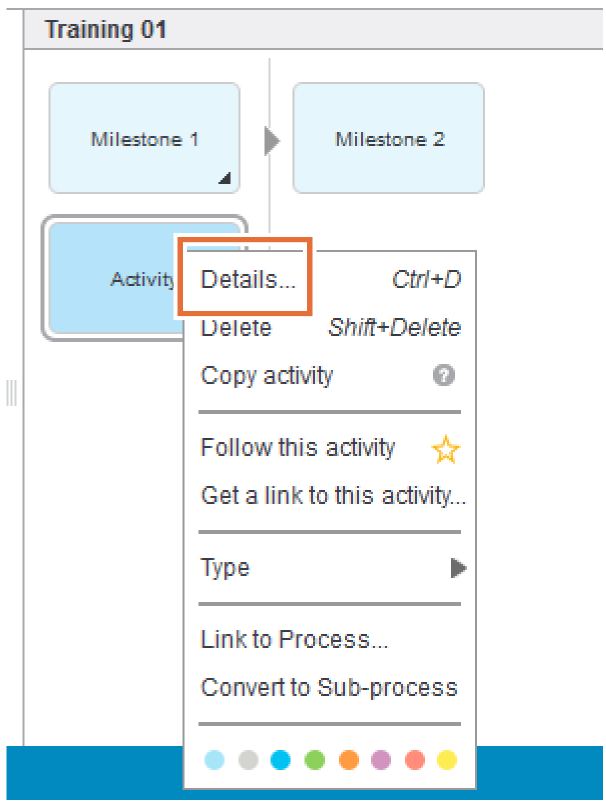


__ 4. Add a participant to the process.

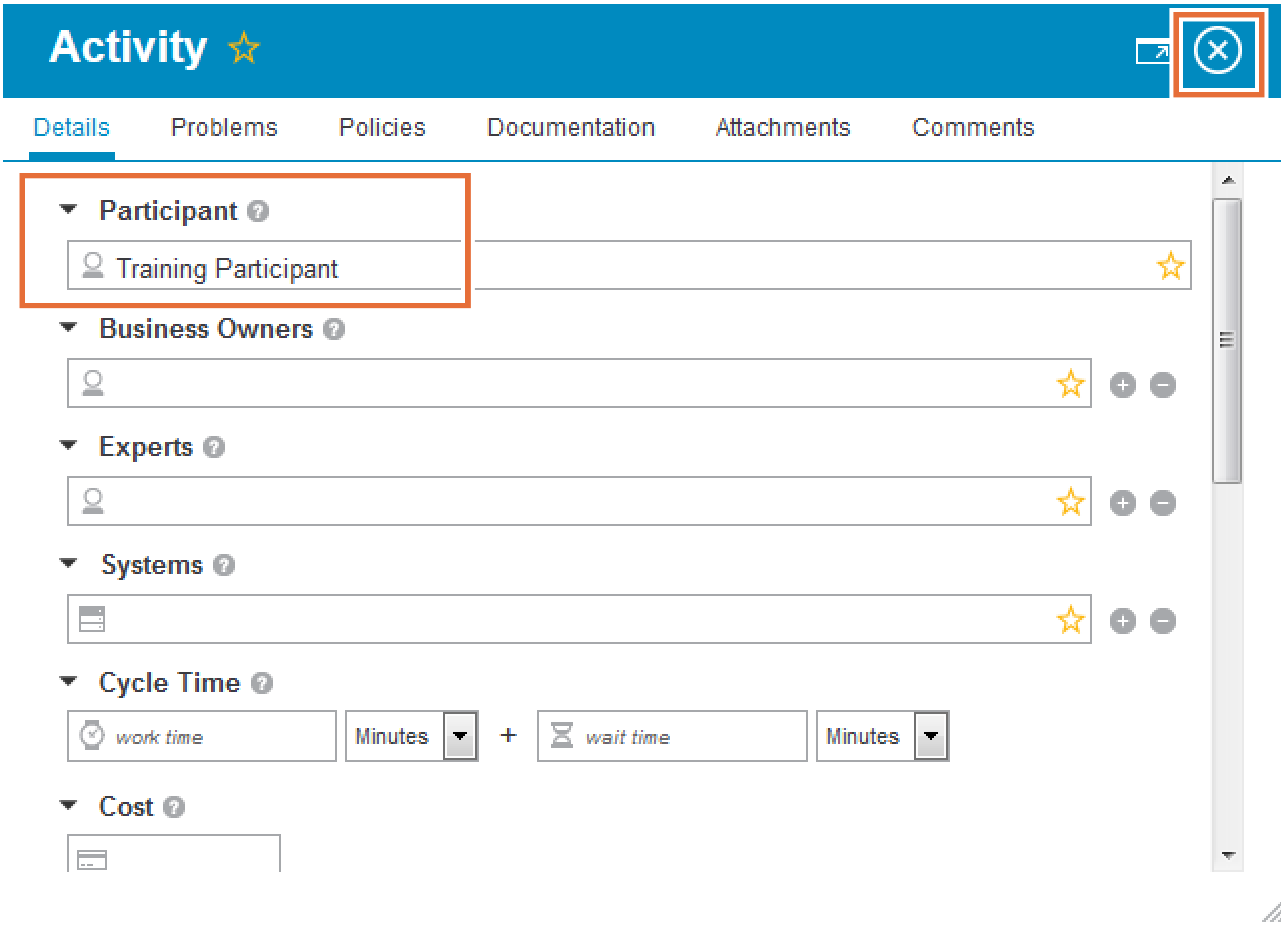
__ a. Right-click the blue **Activity** box.



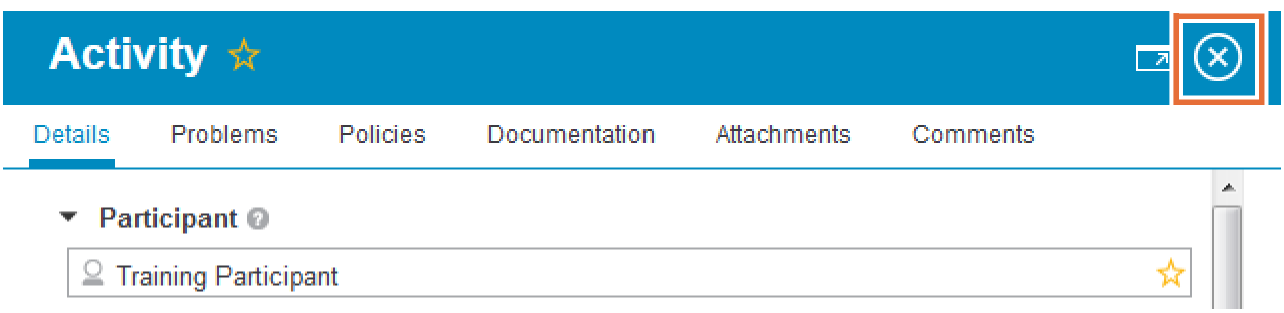
__ b. Select **Details** from the options.



__ c. In the **Participant** field, type: `Training Participant`



__ d. Click **X** to close the **Activity** dialog box.

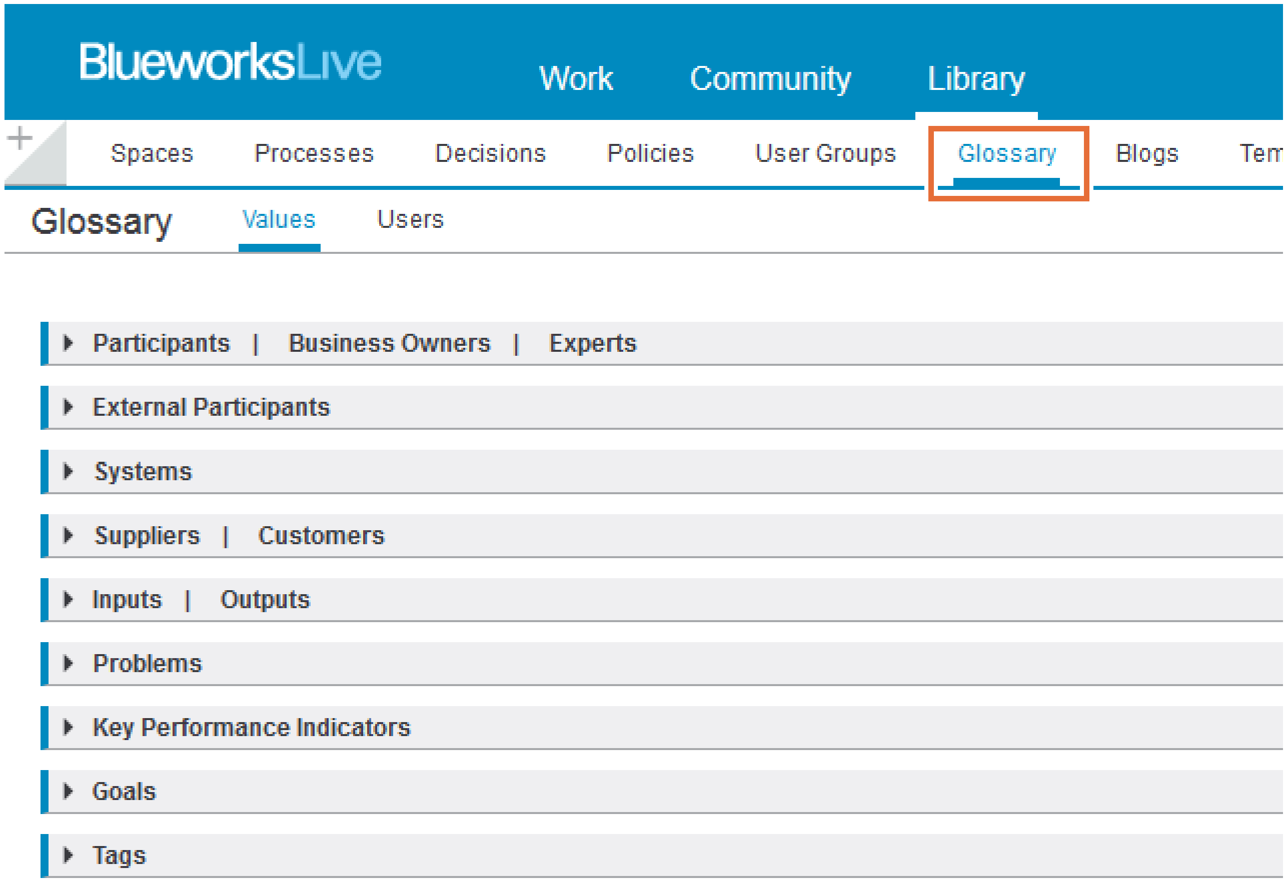


Part 2: Modify the glossary

__ 1. Access the glossary section of the account.

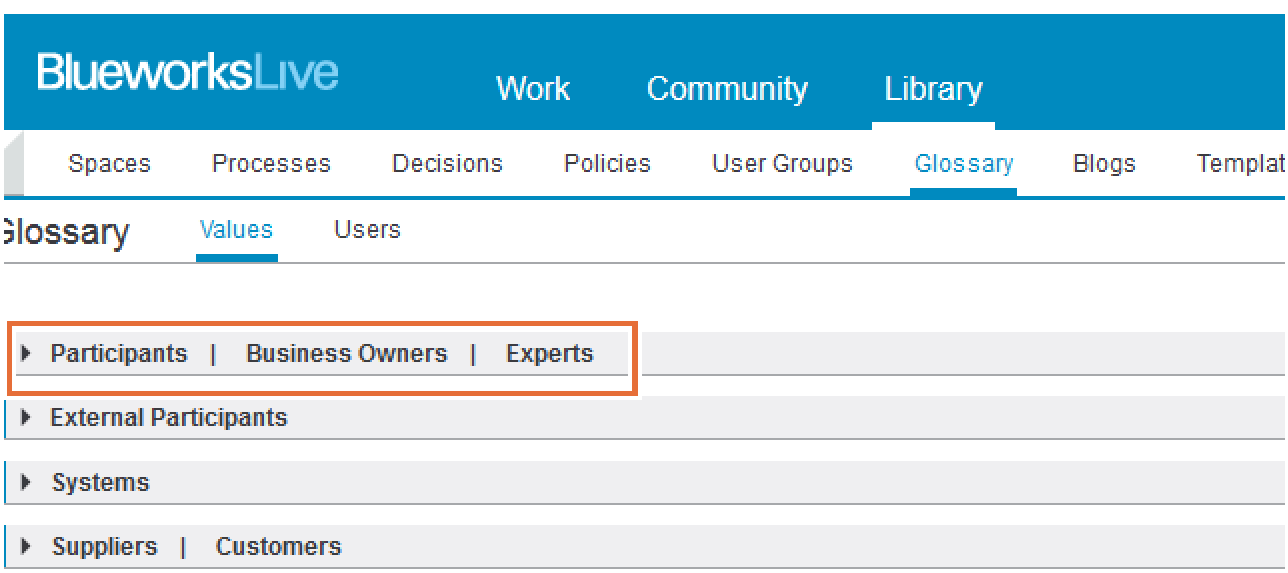
__ a. Click **Library** at the top of the Blueworks Live interface.

__ b. Click the **Glossary** tab.

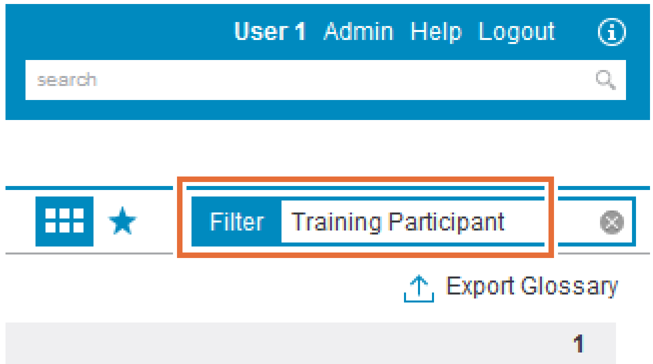


__ 2. Find the new glossary entry.

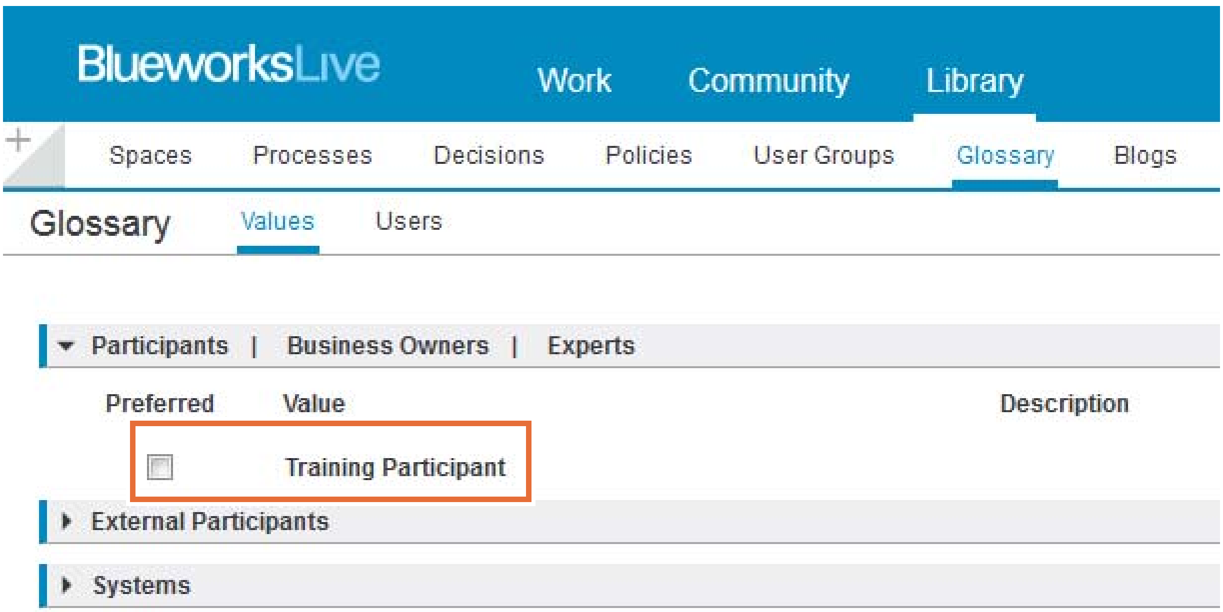
__ a. Expand the **Participants** category.



__ b. In the **Filter** field, enter `Training Participant` to find the new entry.



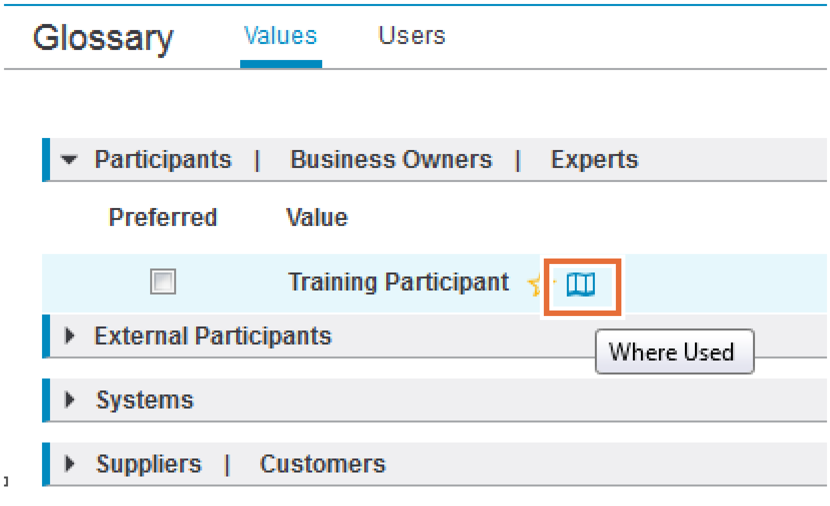
__ c. The new entry is displayed under the **Participants** category.



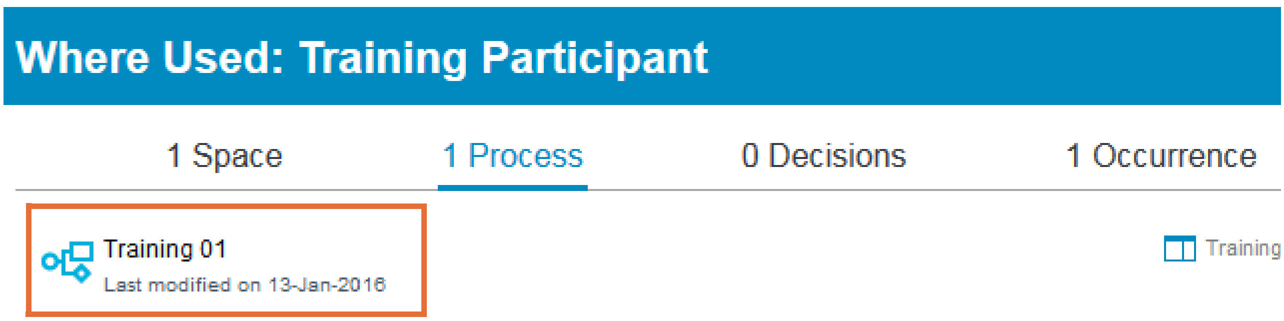
__ 3. Verify the **Where Used** value of the glossary item.

__ a. Hover the cursor over the **Training Participant** entry.

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



__ c. Verify that it is used only in the *Training 01* process in the **Training Space**.

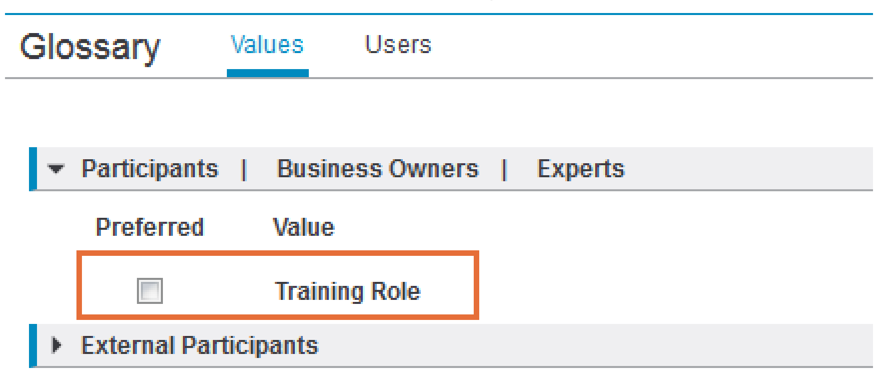


__ d. Click **X** to close the Where Used dialog box.

__ 4. Modify the glossary item.

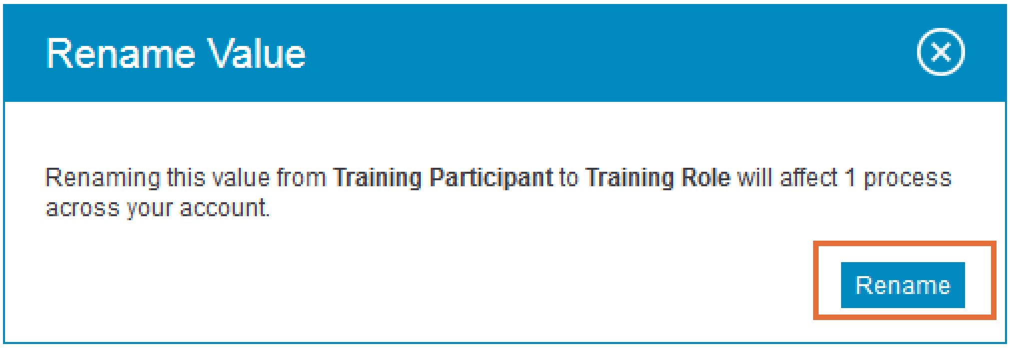
__ a. Click the **Training Participant** name.

__ b. Enter a new value for the name: `Training Role`

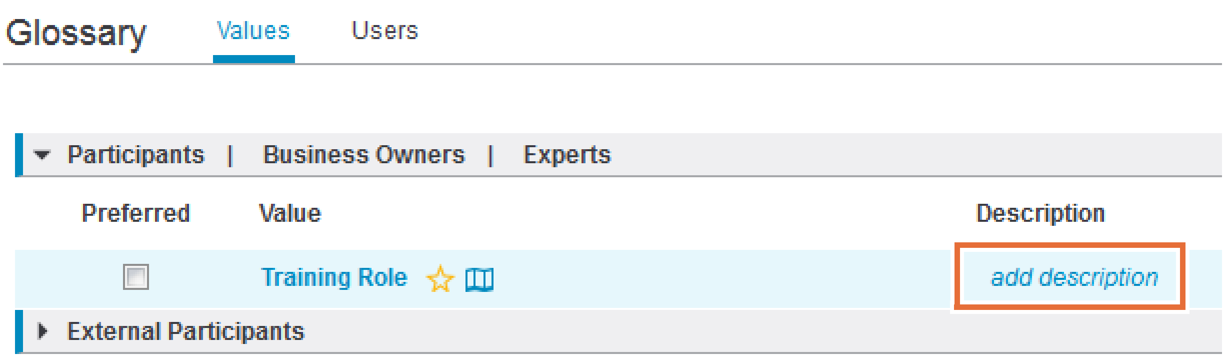


__ c. Press Enter to complete the change.

__ d. Click **Rename** for the confirmation message window.

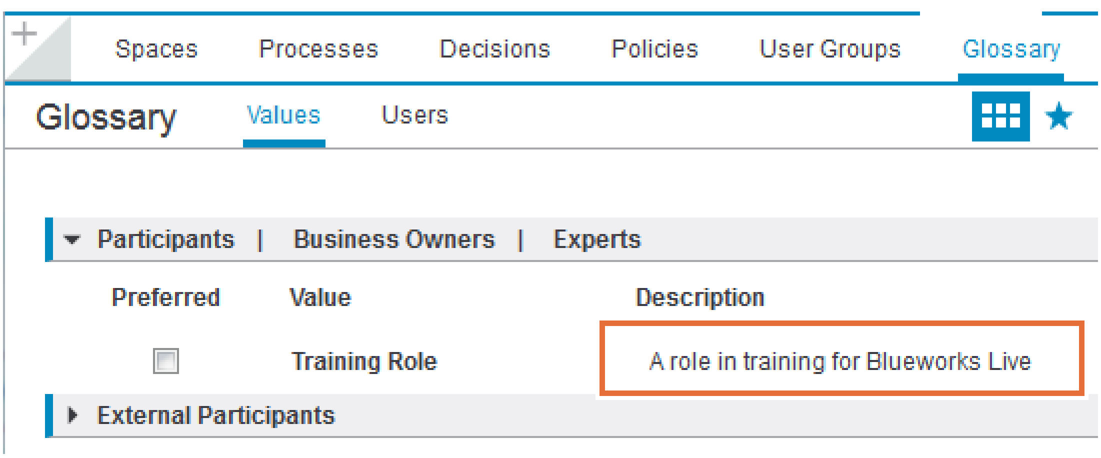


__ e. Hover over **Training Role** and click the **add description** link.

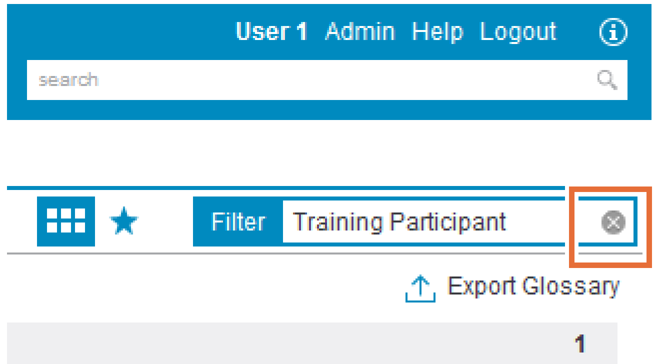


__ f. Enter the description: `A role in training for Blueworks Live`

__ g. Press Enter to complete the change.



__ h. Click the **X** next to the *Training Participant* name in the **Filter** to clear the entry.

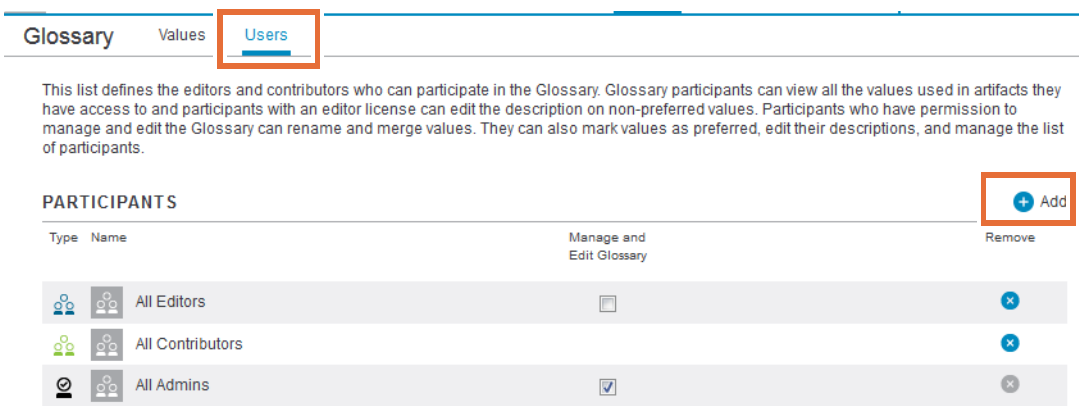


Part 3: Edit the glossary user permissions

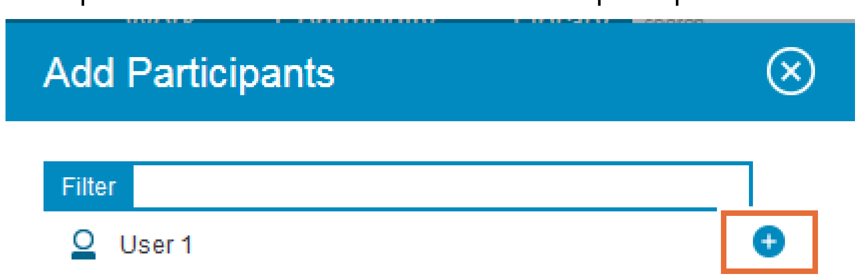
__ 1. Add users to the glossary management.

__ a. Click **Users** at the top of the glossary page.

__ b. Click **+ Add** to add users to manage the glossary.



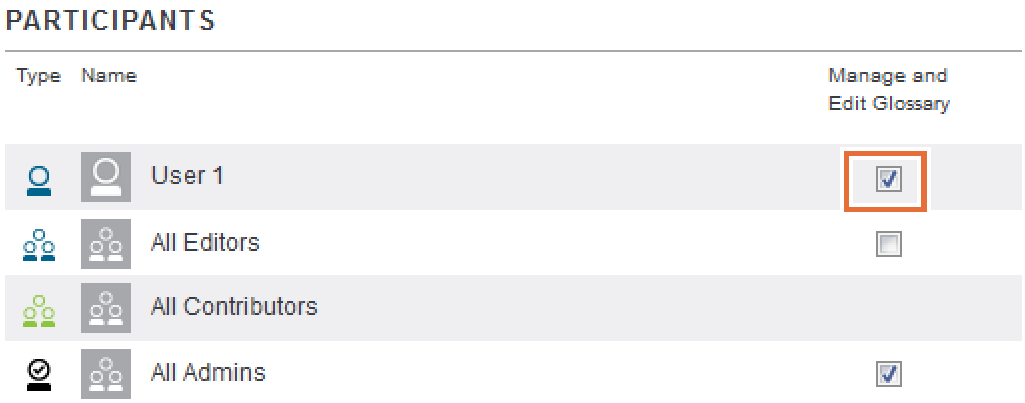
__ c. Click the **+** plus icon next to the name to select the participant from the list provided.



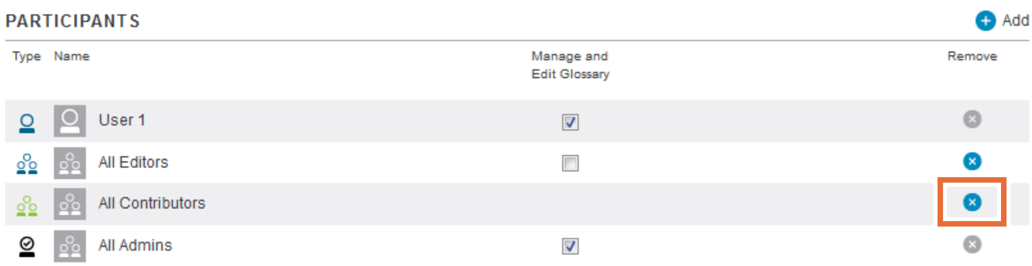
__ d. Click **X** to close the dialog box.

__ 2. Grant permissions to the users.

__ a. Verify that the check box for the user you added is selected to allow the user to edit and manage the glossary.

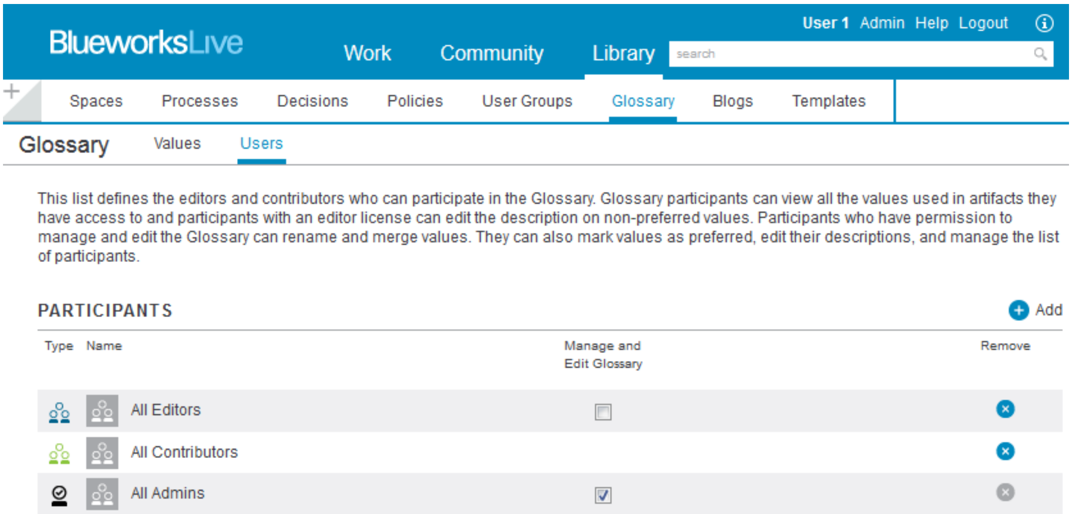


__ b. Click **X** next to the **All Contributors** name to remove it from the list of users.



Note

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



End of exercise

Exercise review and wrap-up

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

Exercise 4. Deleting an attachment in a project

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

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

Introduction

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

Requirements

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

Exercise instructions

Preface

This exercise depends on a Blueworks Live account administrator access.

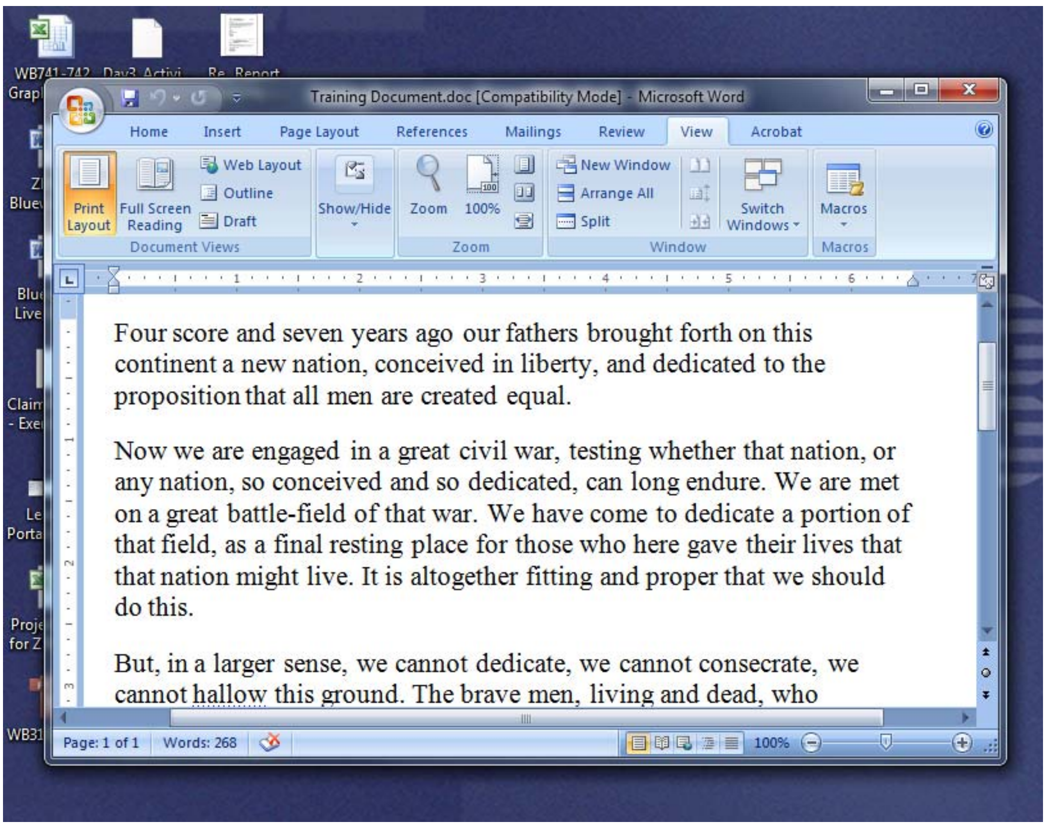
Part 1: Attach a file to a process

__ 1. Create a document

__ a. Create a document file with Microsoft Word or any other preferred document application.

__ b. Add sample text to the document. The content does not matter.

__ c. Save the file to your desktop and use the following title: `Training Document`



Note

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

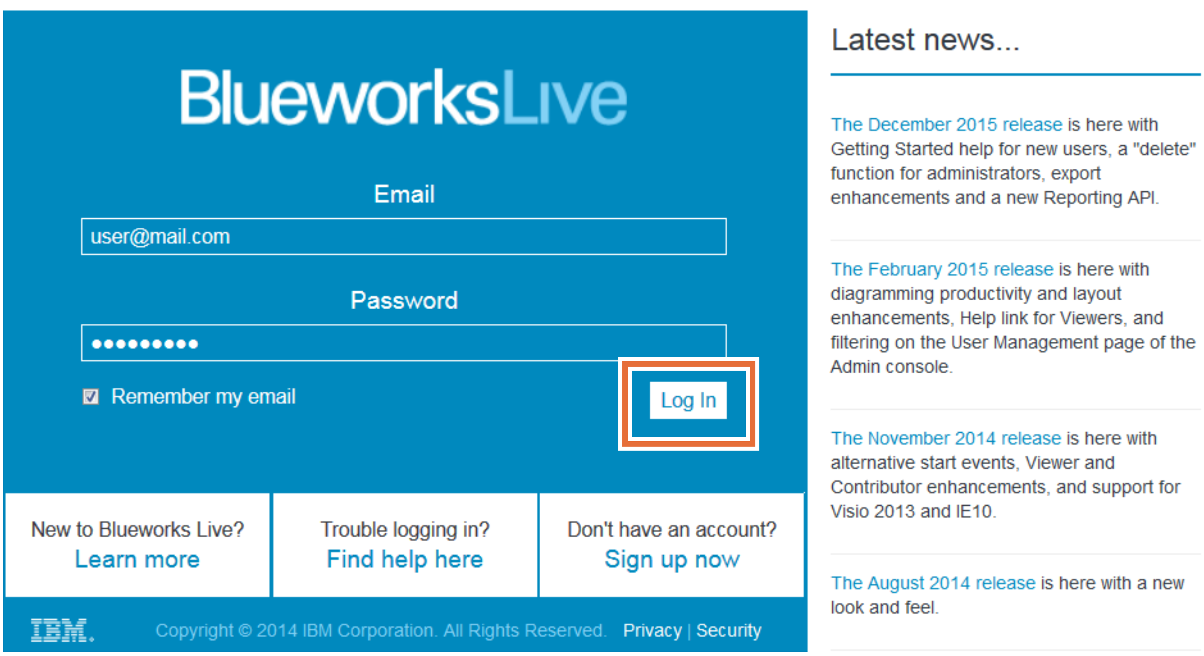
__ 2. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

`https://www.blueworkslive.com/`

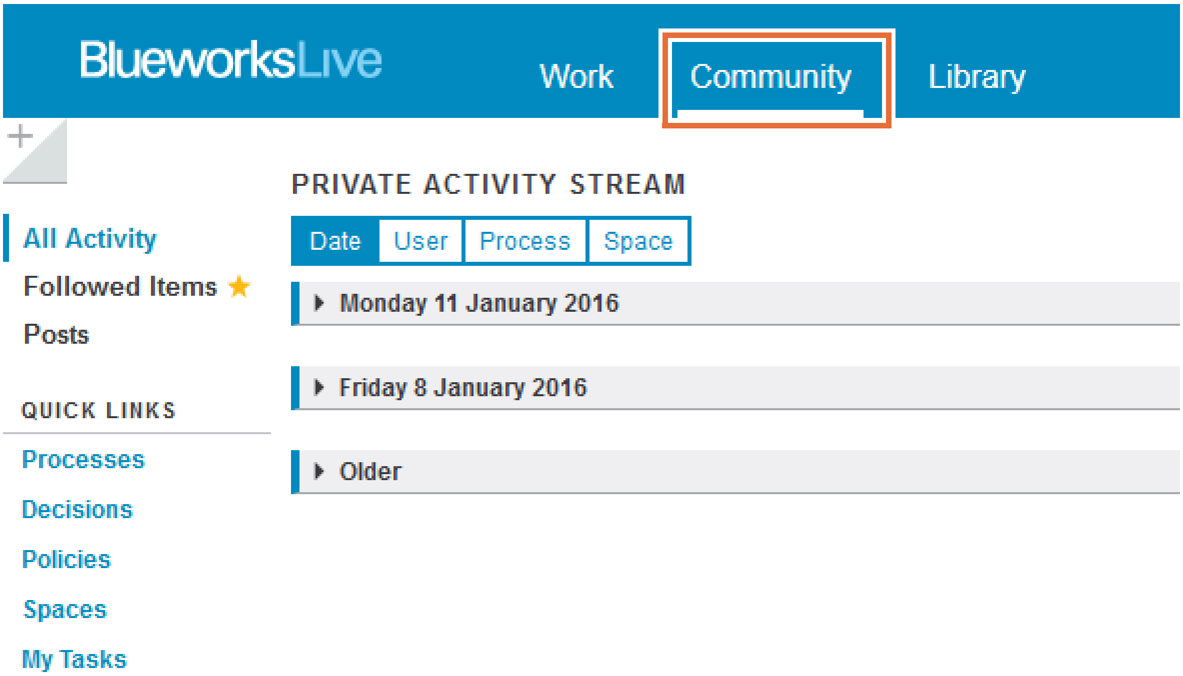
__ b. Click **Log In** on the upper-right corner of the window.

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

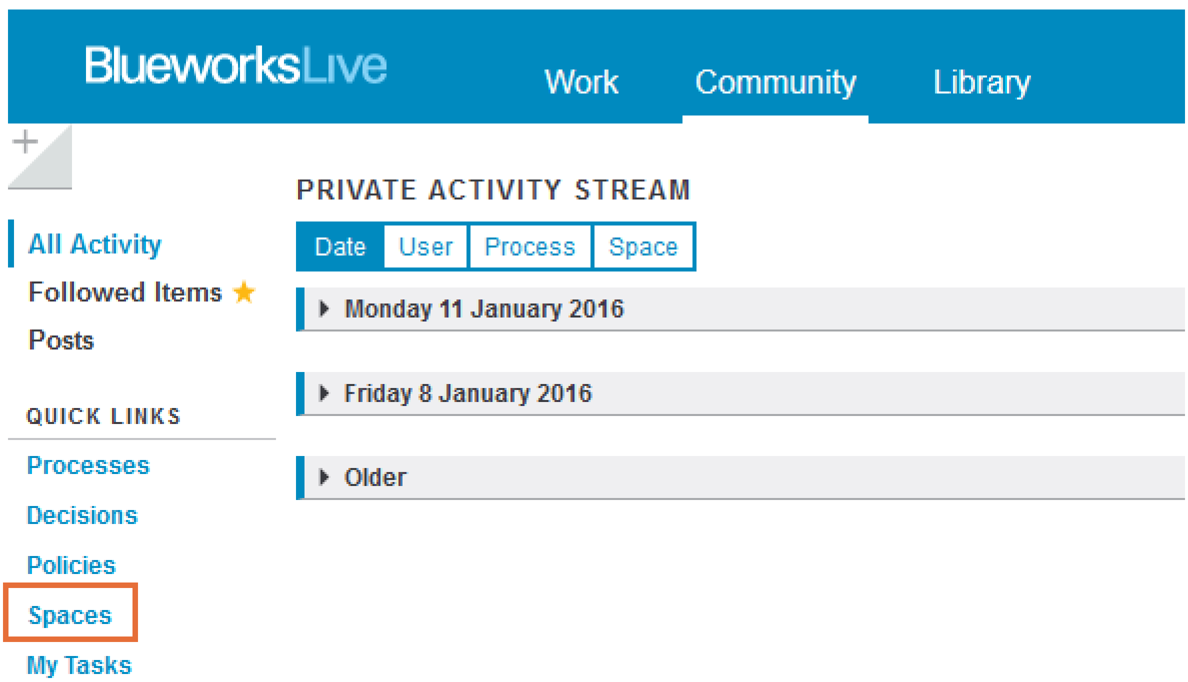


__ 3. Access the Space.

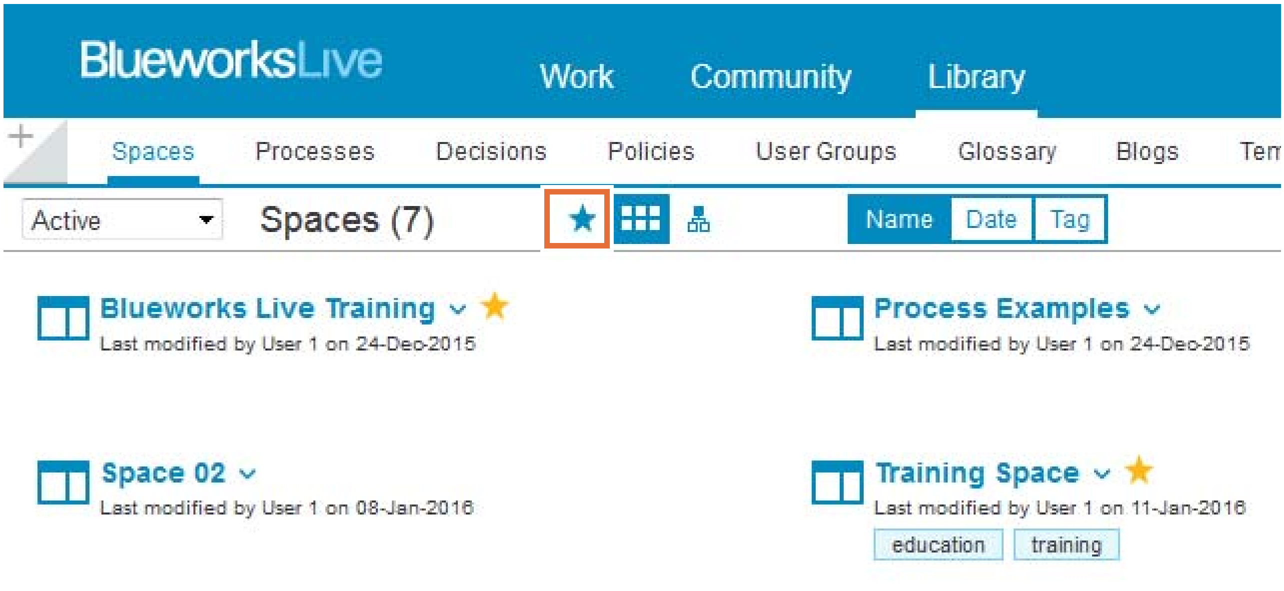
__ a. Click **Community** at the top of the Blueworks Live interface.



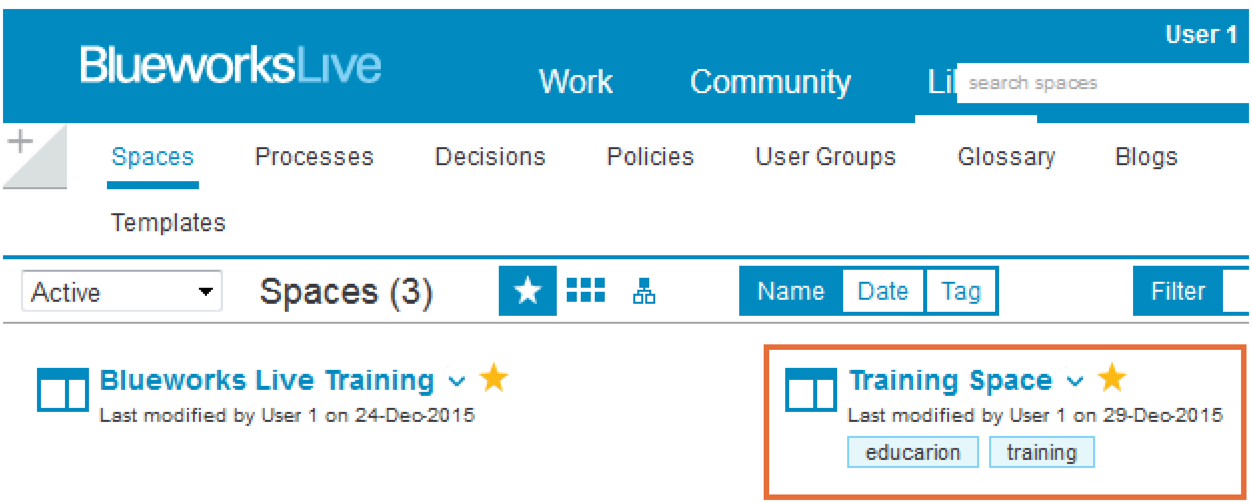
__ b. Click the **Spaces** link.



__ c. Click the star icon to list only the spaces you are following.

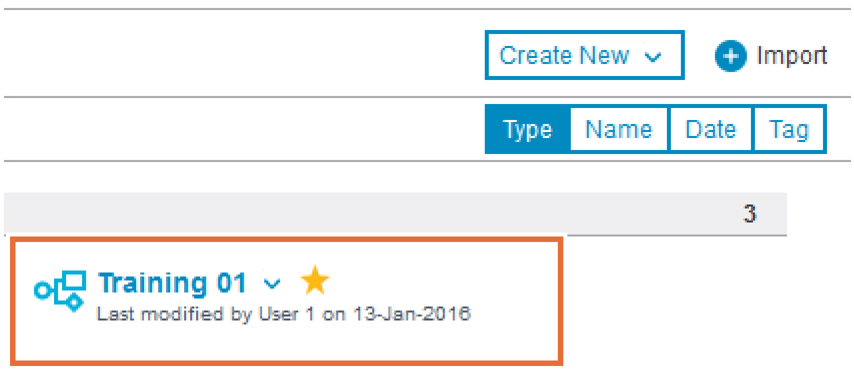


__ d. Click **Training Space**..

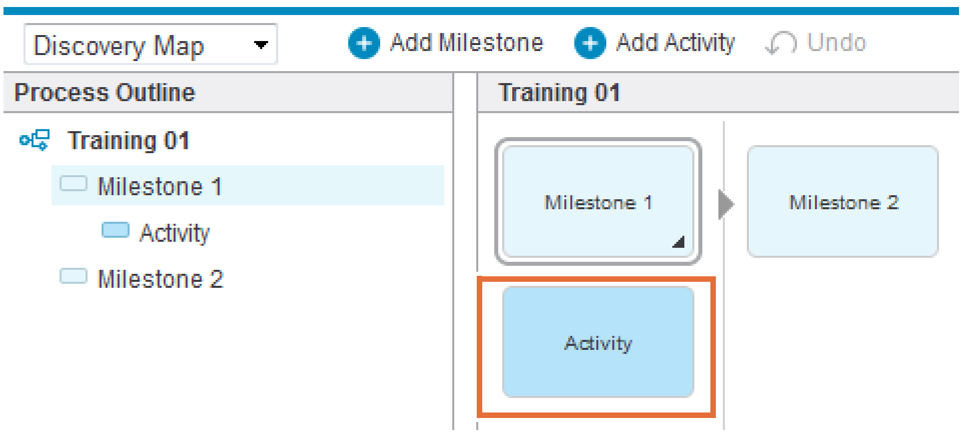


__ 4. Access the process and attach a file.

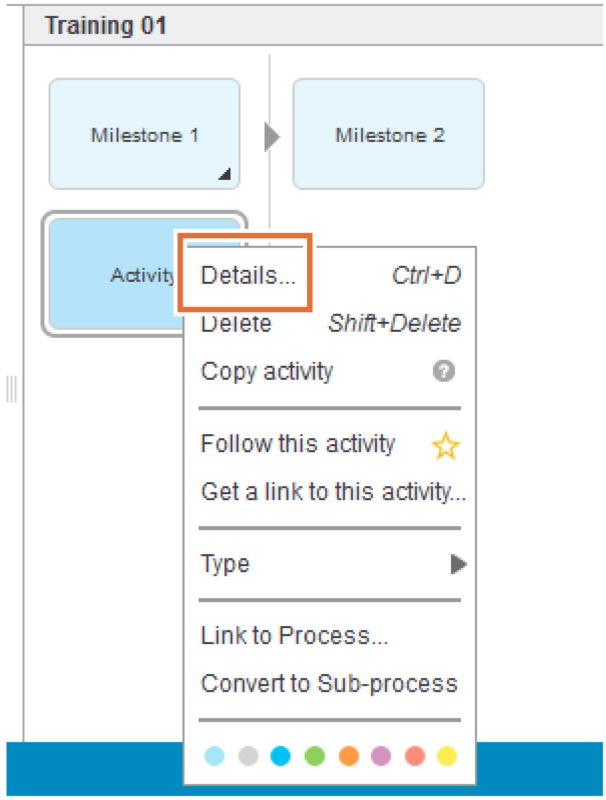
__ a. Click the **Training 01** process in the right side of the space page.



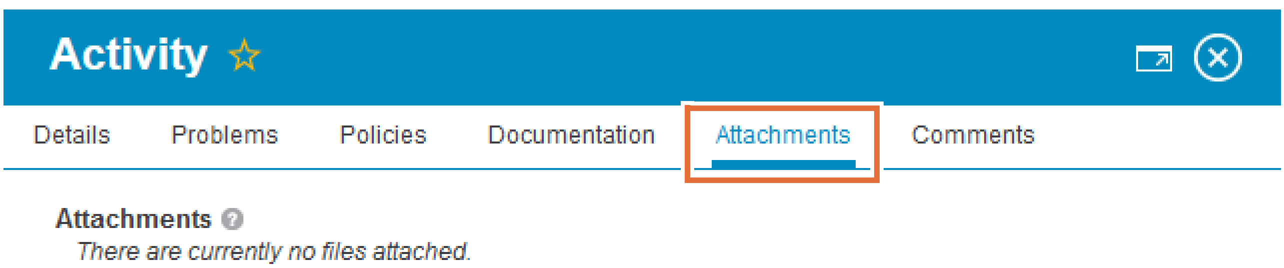
__ b. Right-click the blue **Activity** box.



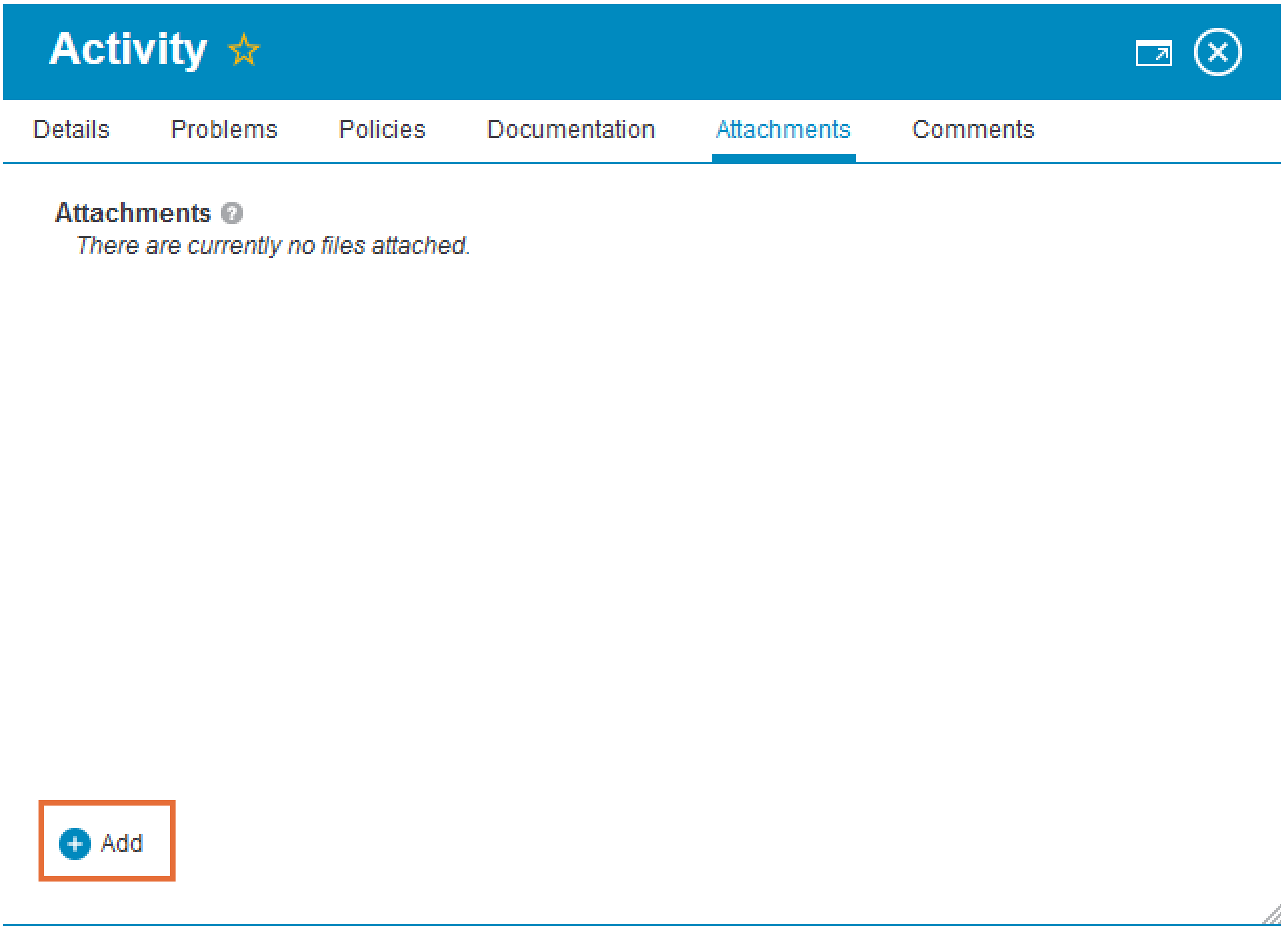
__ c. Select **Details** from the options.



__ d. Click the **Attachments** tab in the Activity dialog box.

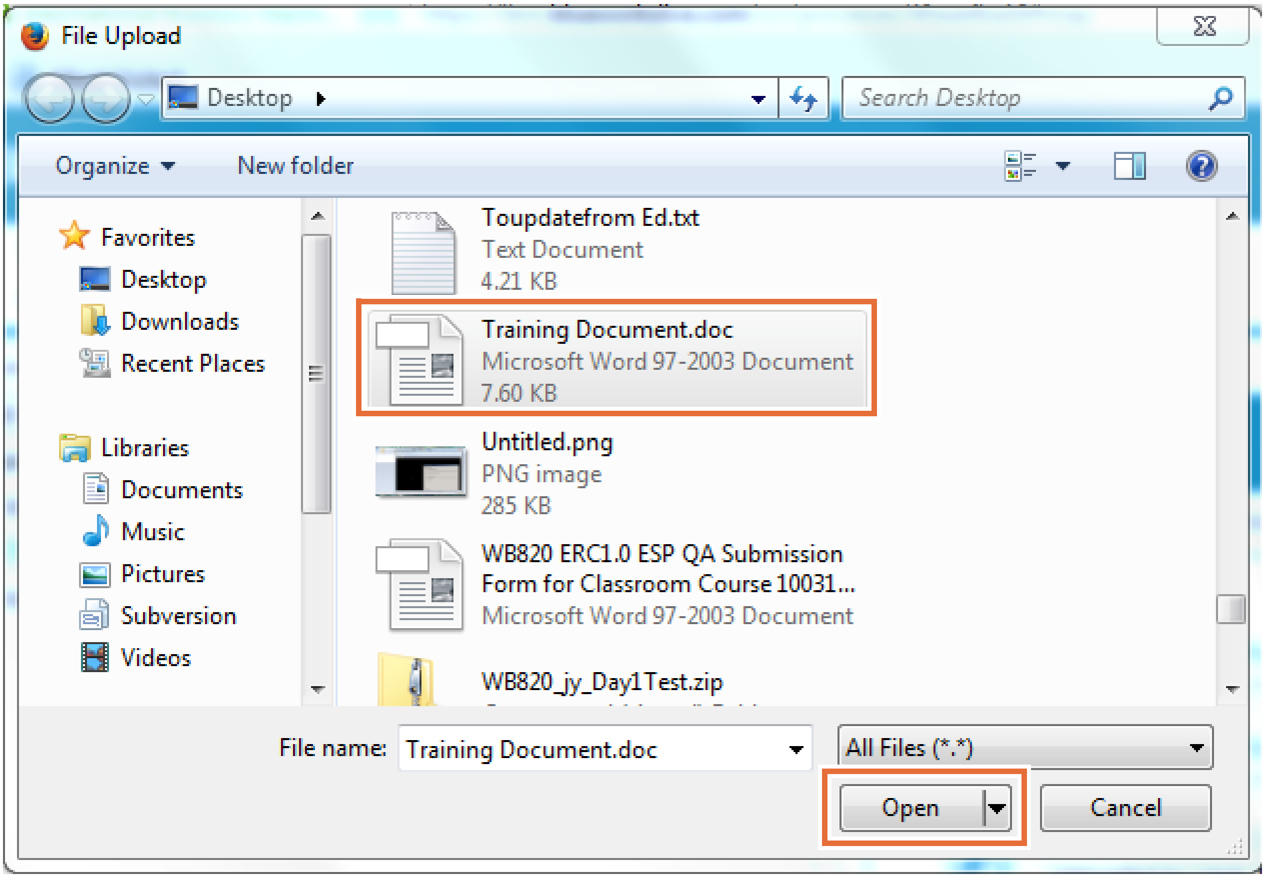


__ e. Click **Add**.

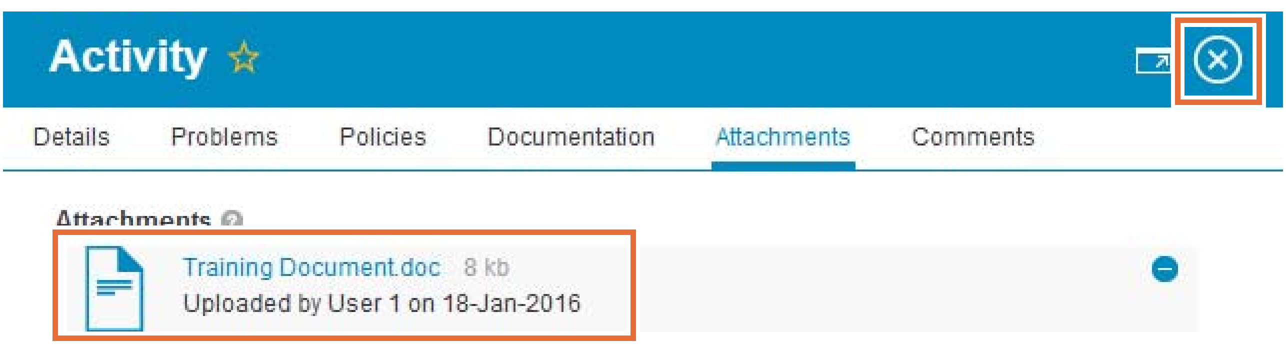


__ f. Select the document **Training Document.doc** from your desktop.

__ g. Click **Open** to attach the document to the activity.



__ h. Verify that the document is added to the process.



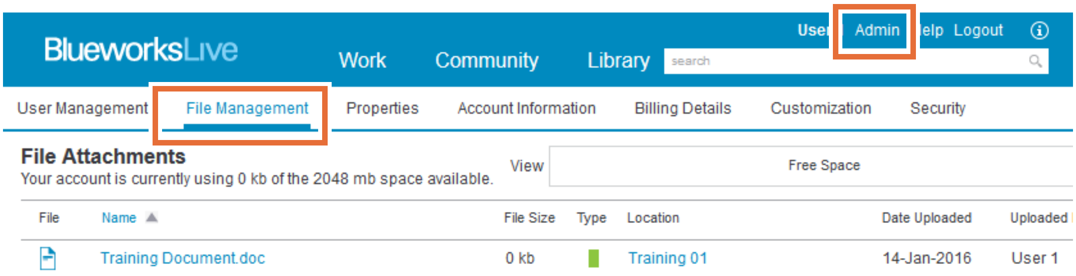
__ i. Click **X** to close the dialog box.

Part 2: Delete the file from the account

__ 1. Access the **File Management** section of the account.

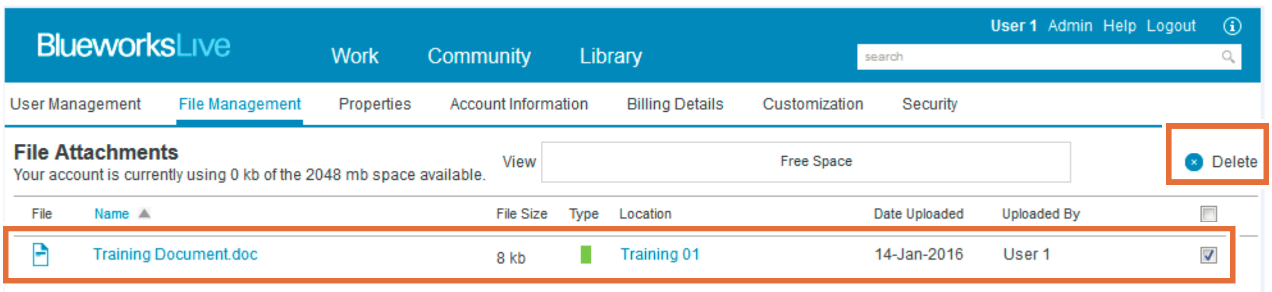
__ a. Click the **Admin** link at the top of the Blueworks Live interface.

__ b. Click the **File Management** tab on the Admin page.

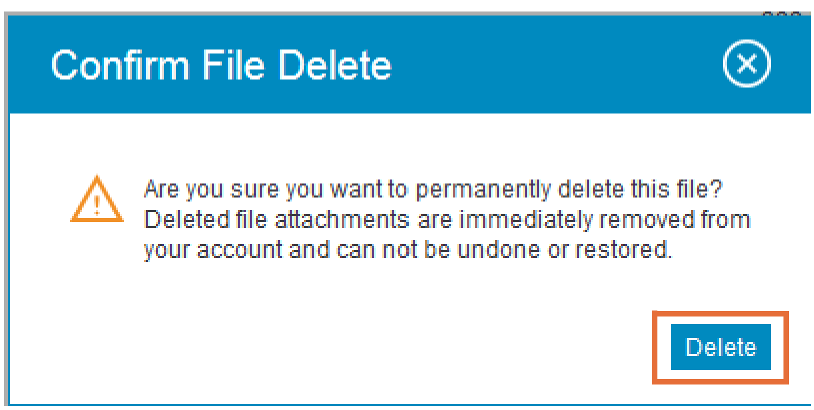


__ c. Select the check box next to the **Training Document** that is attached to the *Training 01* process.

__ d. Click **Delete**.

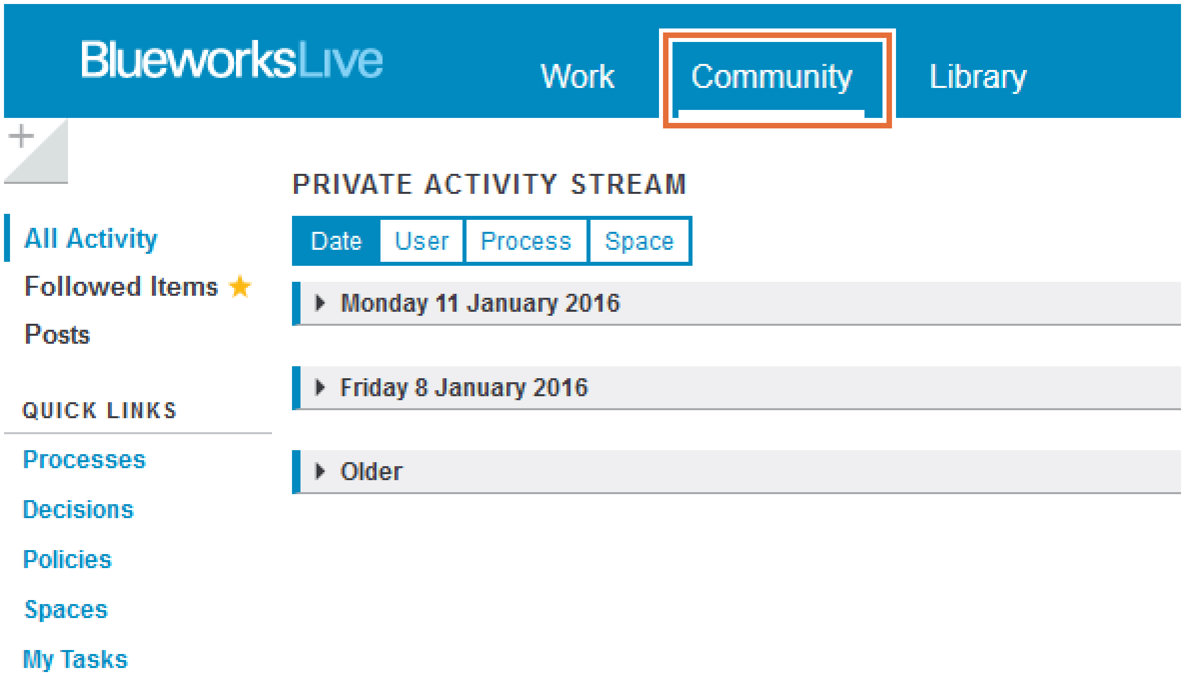


__ e. Click **Delete** to confirm the deletion of the file.

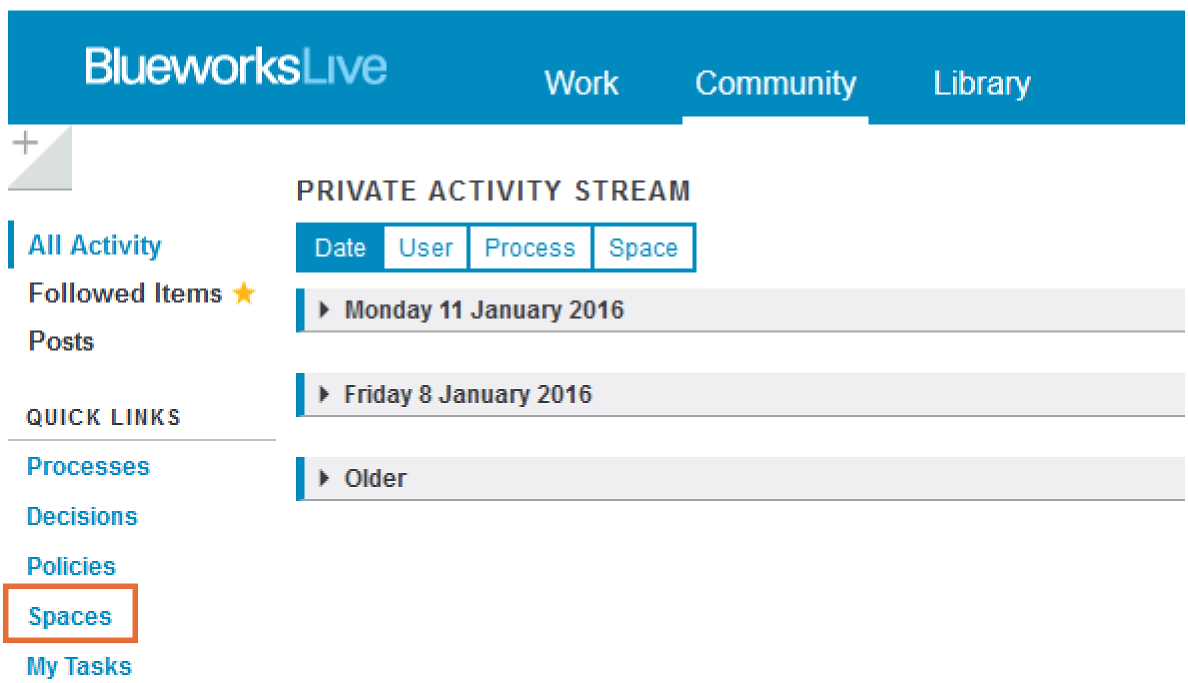


__ 2. Verify the file deletion.

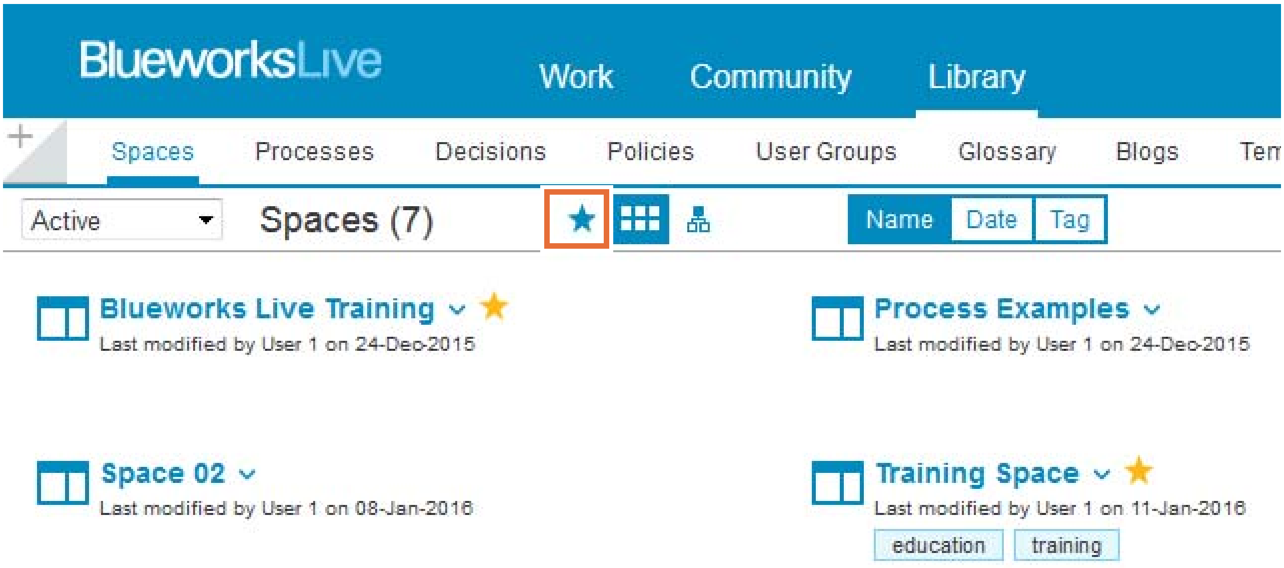
__ a. Click **Community** at the top of the Blueworks Live interface.



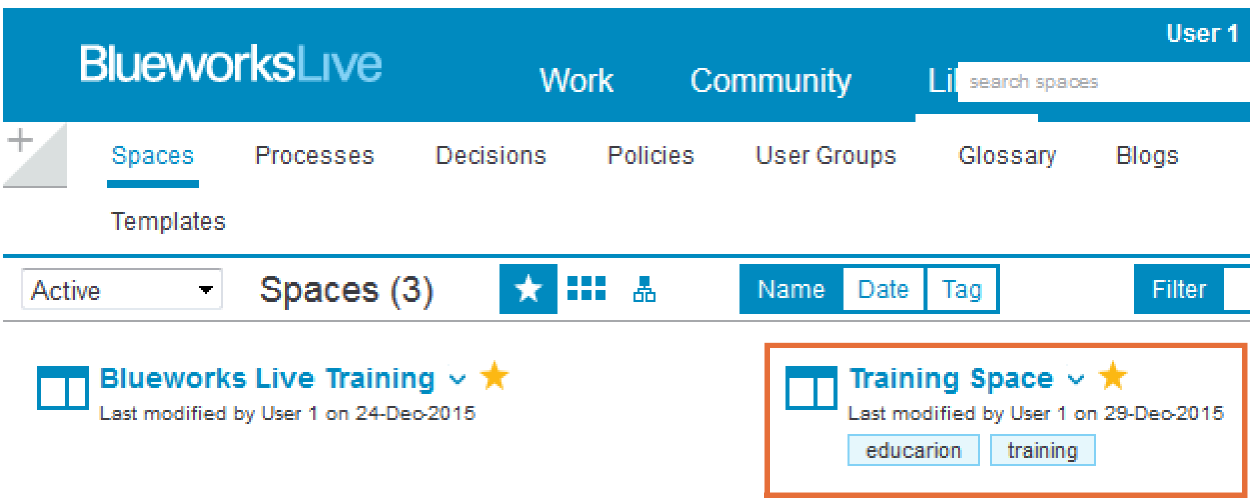
__ b. Click the **Spaces** link.



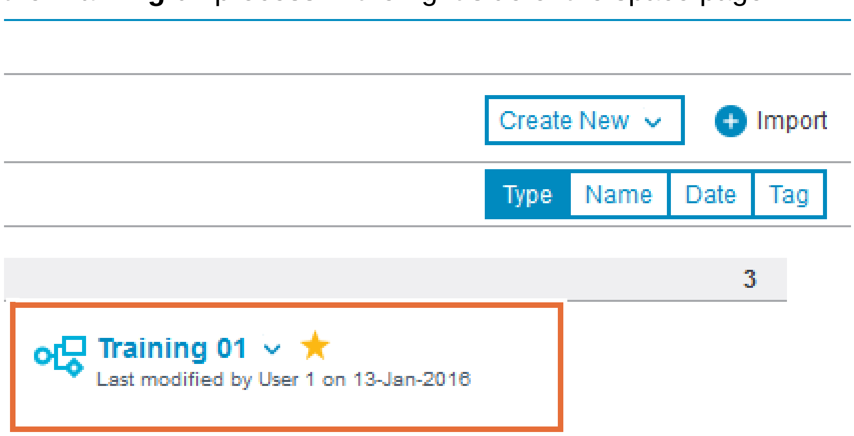
__ c. Click the star icon to list only the spaces you are following.



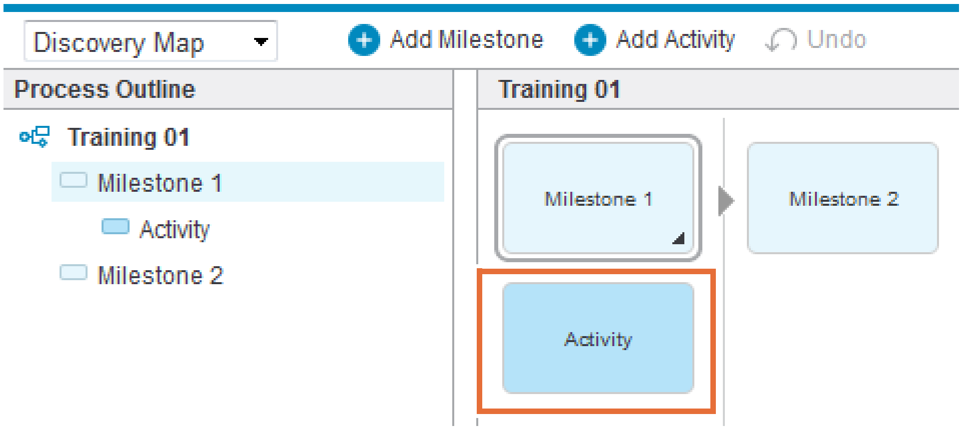
__ d. Click **Training Space**.



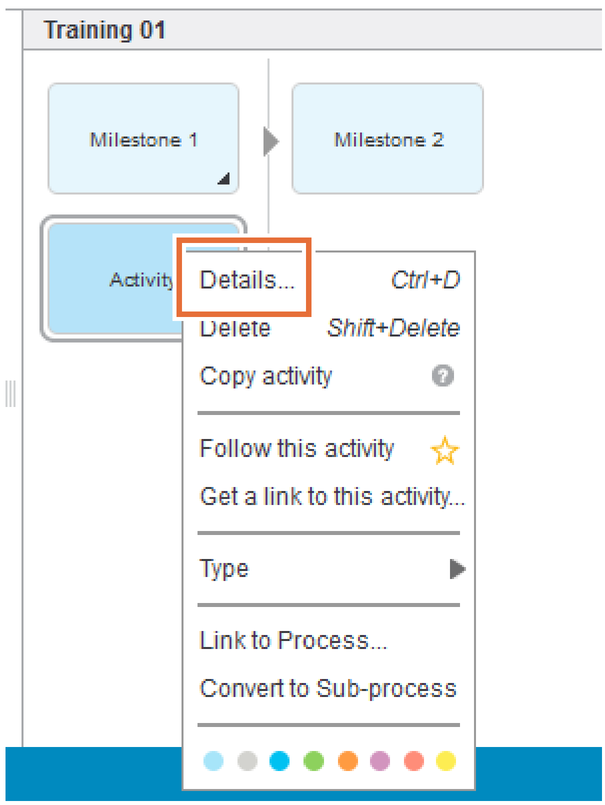
__ a. Click the **Training 01** process in the right side of the space page.



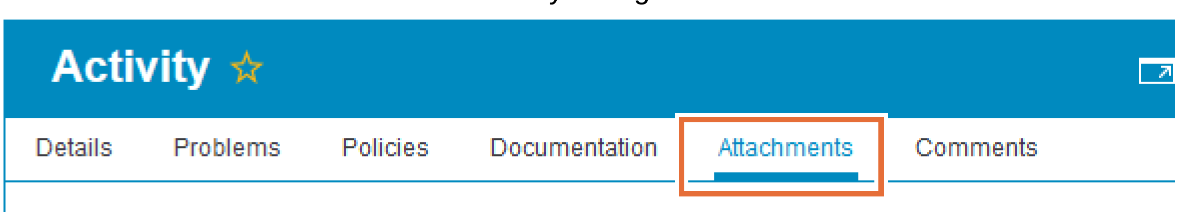
__ b. Right-click the blue **Activity** box.



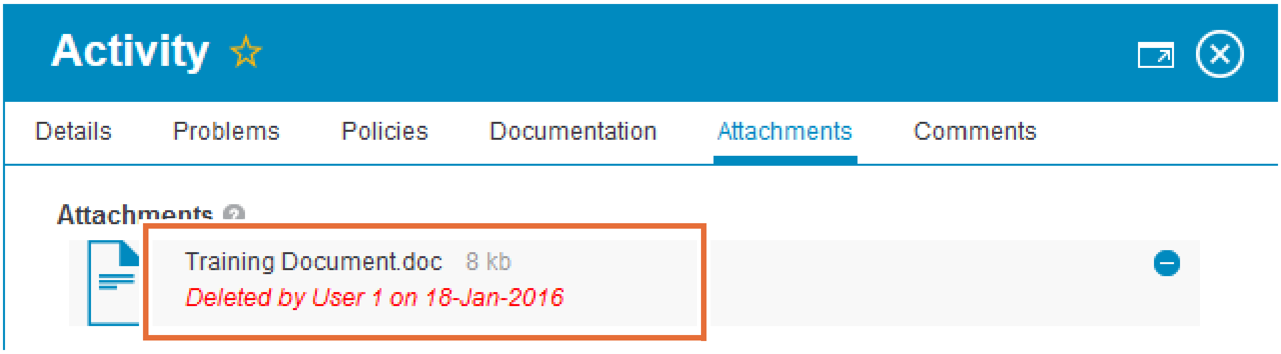
__ c. Select **Details** from the options.



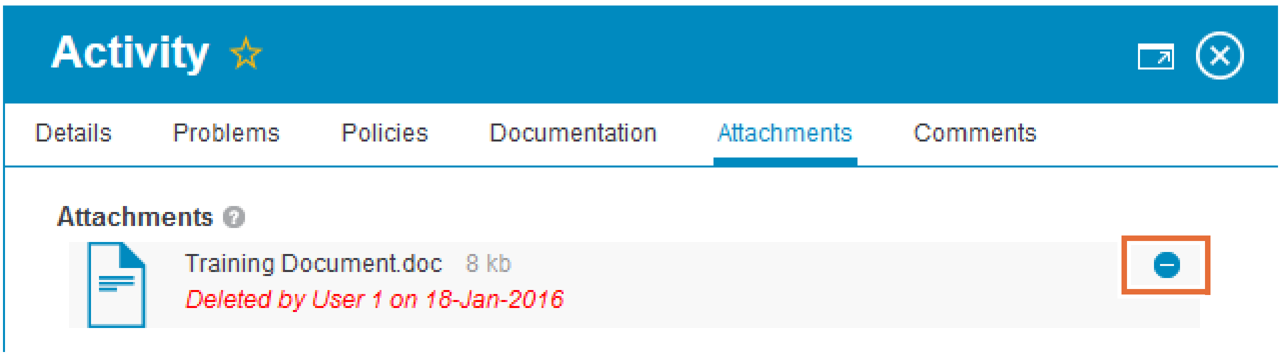
__ d. Click the **Attachments** tab in the Activity dialog box.



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



__ f. Click the **-** minus icon to remove it from the attachments.



__ g. Click **X** to the close the dialog box.

End of exercise

Exercise review and wrap-up

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

Exercise 5. Capturing a policy in a Blueworks Live blueprint

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

- Capture a policy in a Blueworks Live blueprint

Introduction

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

Requirements

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

Exercise instructions

Preface

This exercise depends on a Blueworks Live account access.

Part 1: Capture a policy in Blueworks Live

Note

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

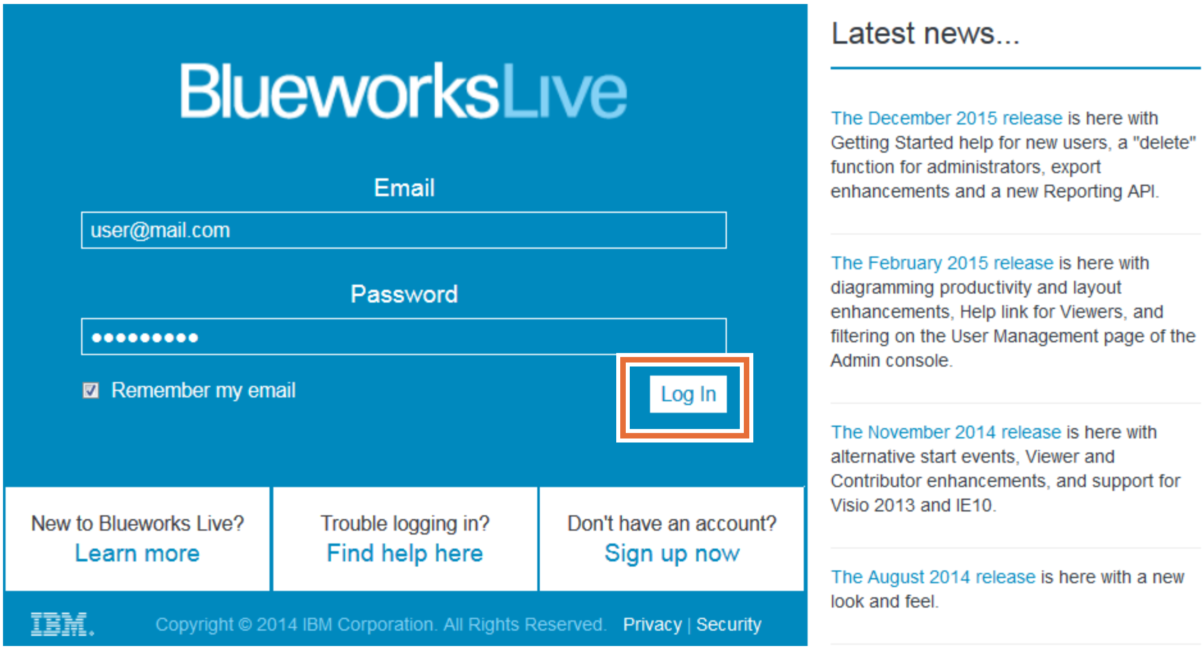
__ 1. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

`https://www.blueworkslive.com/`

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

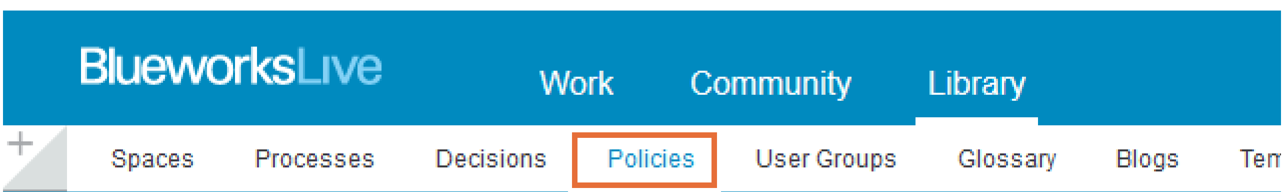
__ c. Enter the account email address, password, and click **Log In**.



__ 2. Access the Policies section in Blueworks Live.

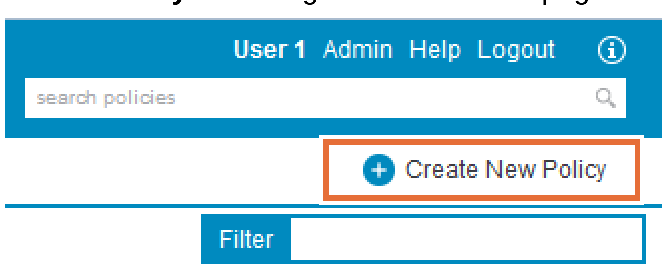
__ a. Click **Library** at the top of the Blueworks Live interface.

__ b. Click the **Policies** tab.



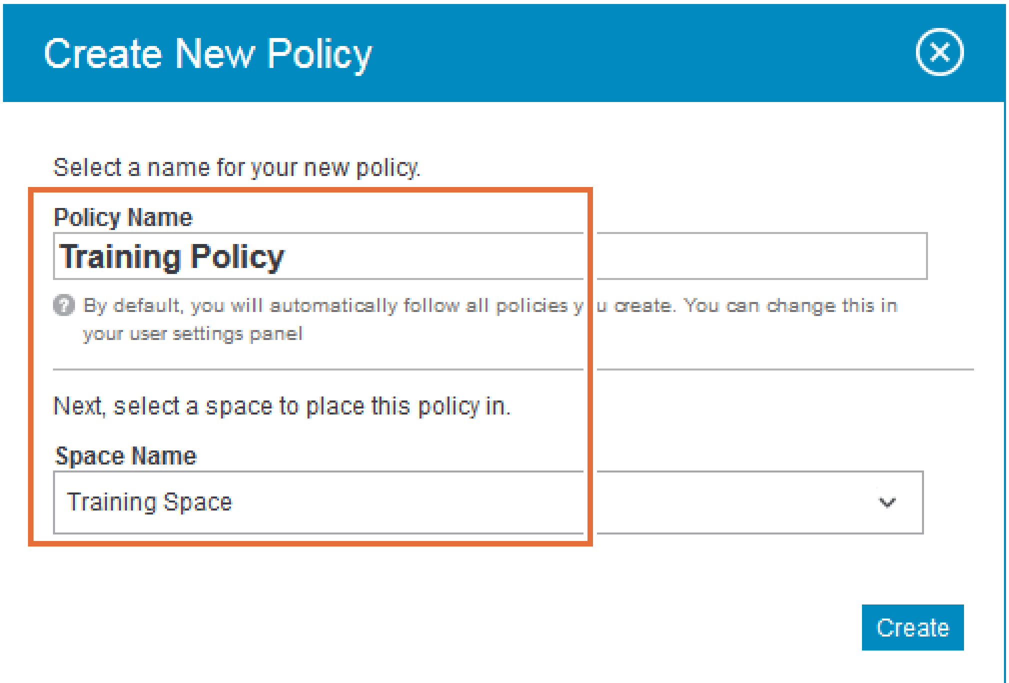
__ 3. Capture a policy.

__ a. Click **+ Create New Policy** on the right of the Policies page.

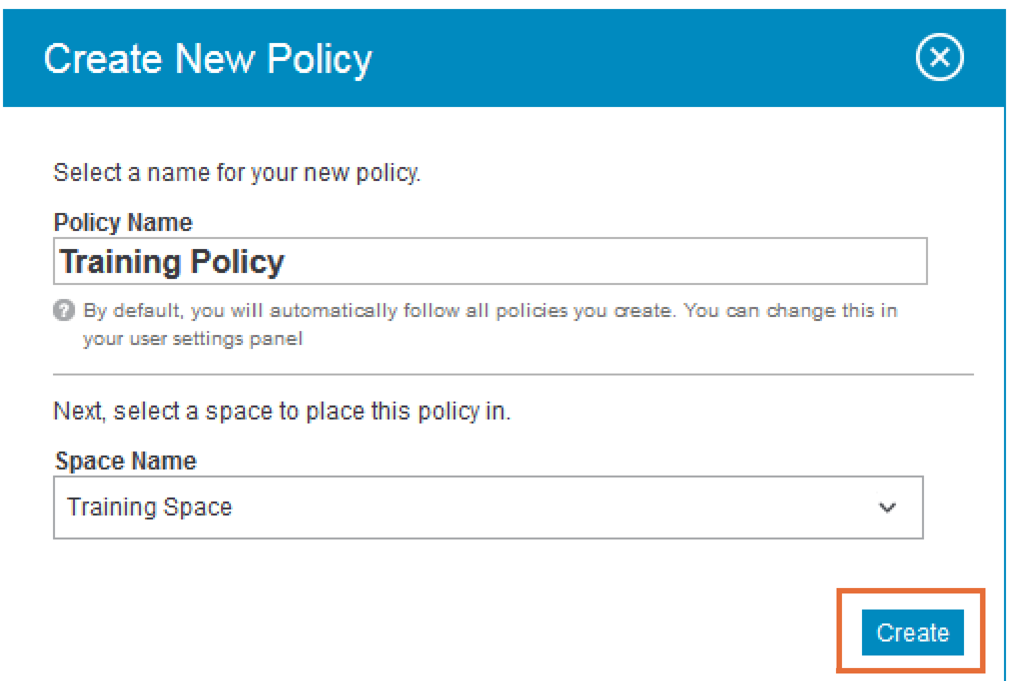


__ b. Name the policy: `Training Policy`

__ c. Select the **Training Space** space from the **Space Name** list.

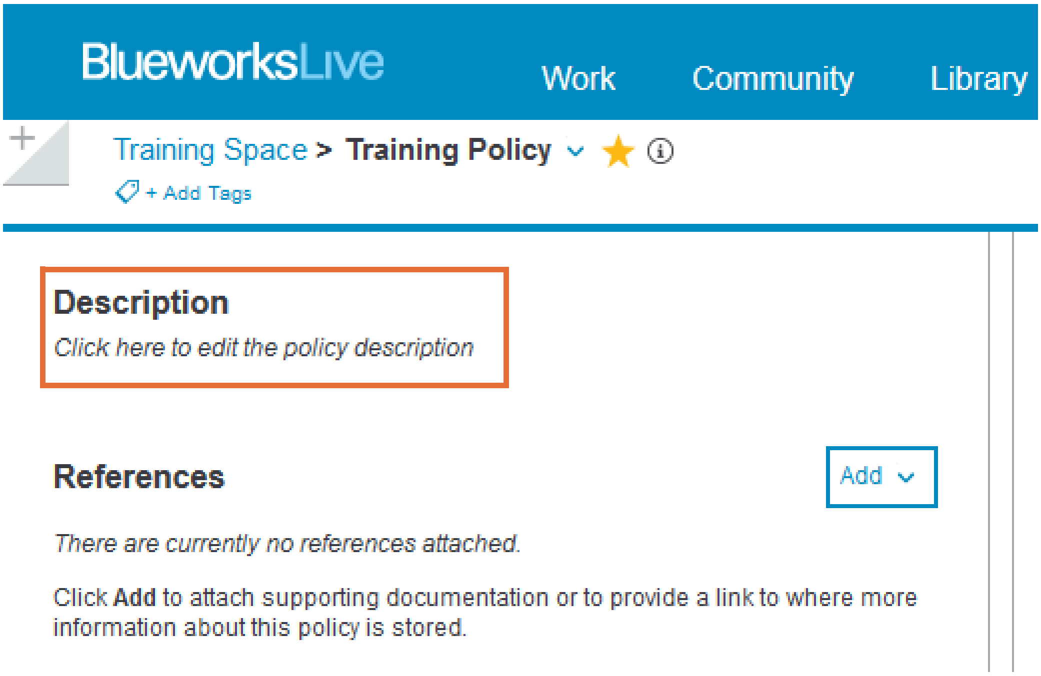


__ d. Click **Create** to complete the creation of the policy.

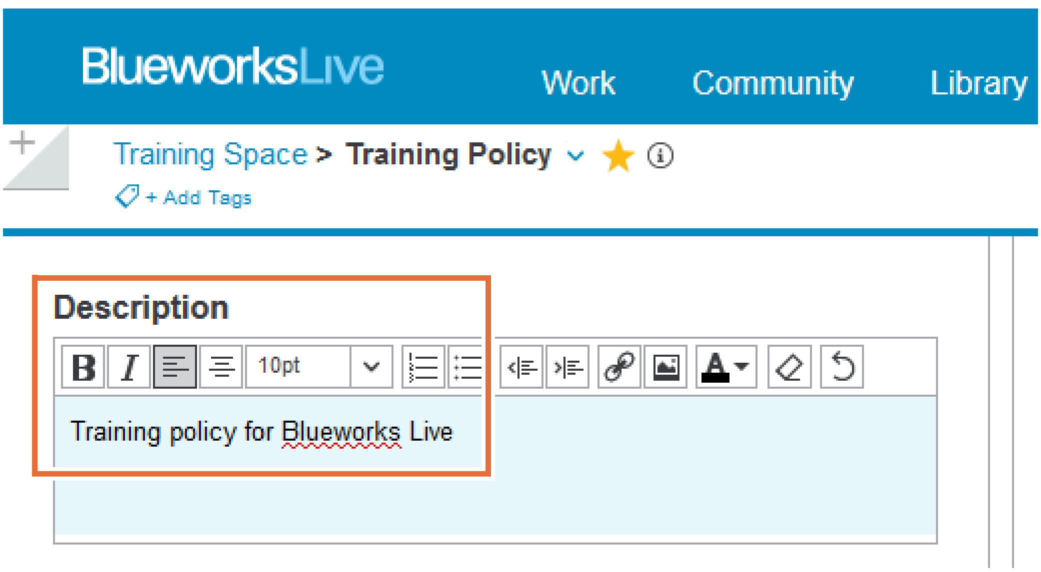


__ 4. Add details to the policy page.

__ a. Click the **Description** area to access the editor.

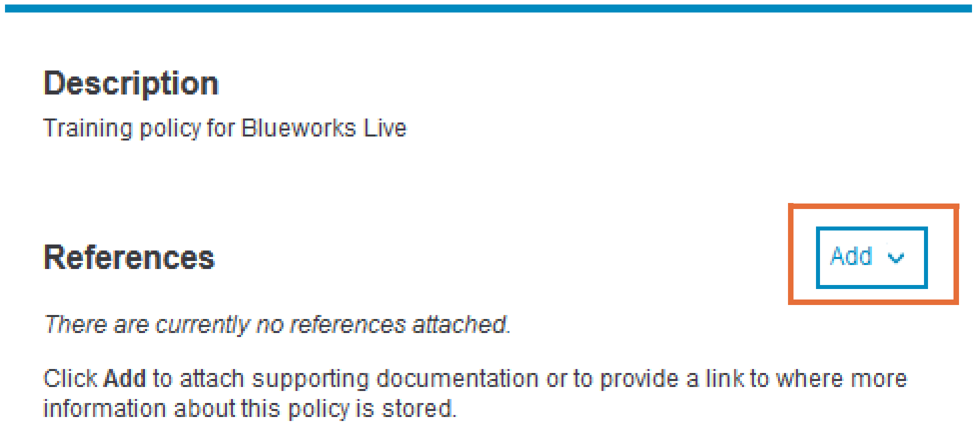


__ b. Add the following description: `Training policy for Blueworks Live`

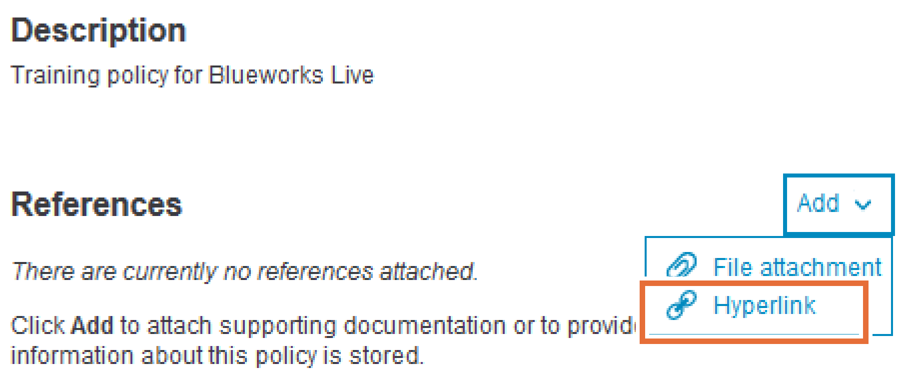


__ c. Click outside the editor to save the description.

__ d. Click **Add** to add a reference for the policy.



__ e. Select the **Hyperlink** option.

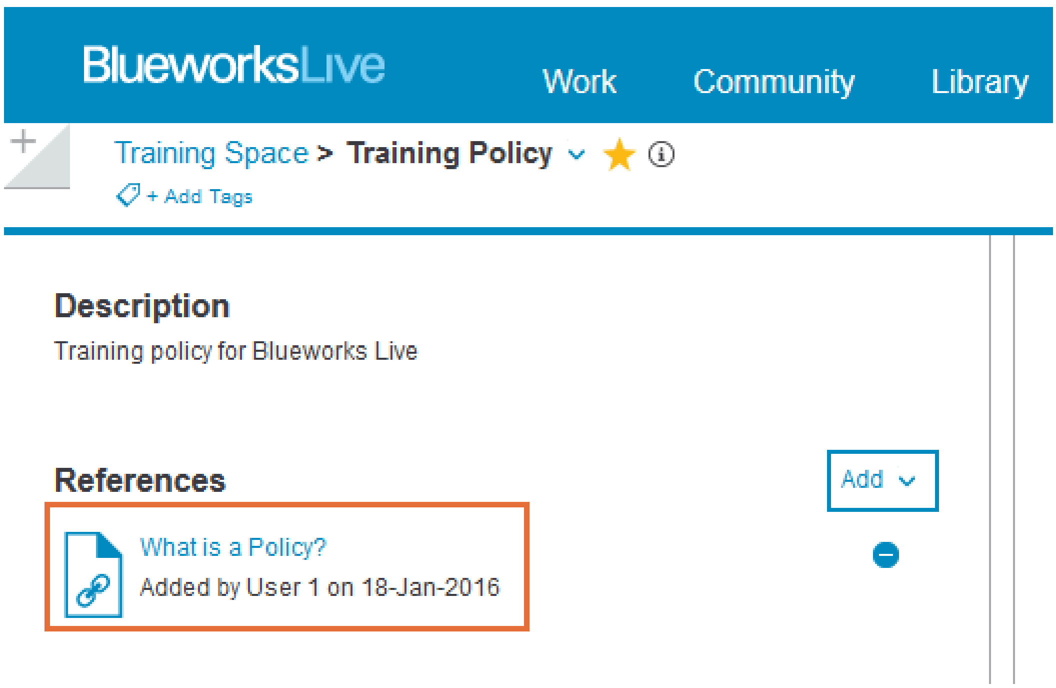


__ f. Enter the link name: `What is a Policy?`

__ g. Enter the URL for the link: `http://en.wikipedia.org/wiki/Policy`

__ h. Click **Add** to complete the link reference.

__ i. Click the link to verify that the reference link is valid.



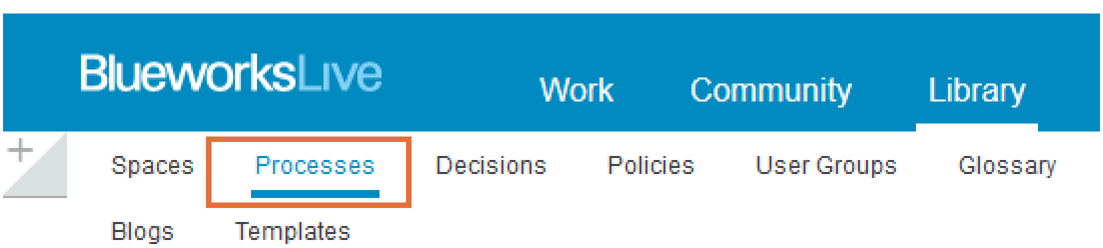
__ j. The link opens in a default browser window.

Part 2: Add a policy to a blueprint process

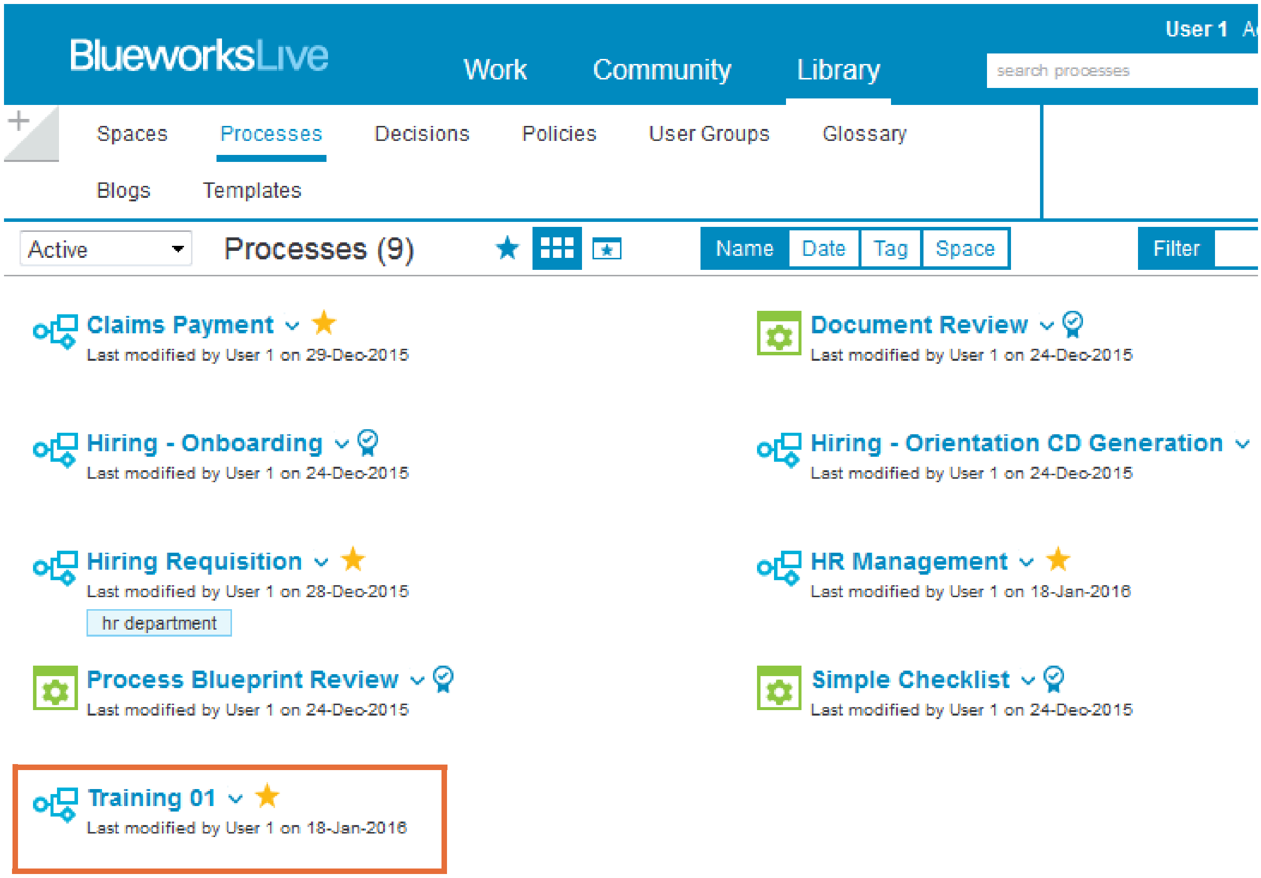
__ 1. Add the policy to the process details.

__ a. Click the **Library** link at the top of the Blueworks Live interface.

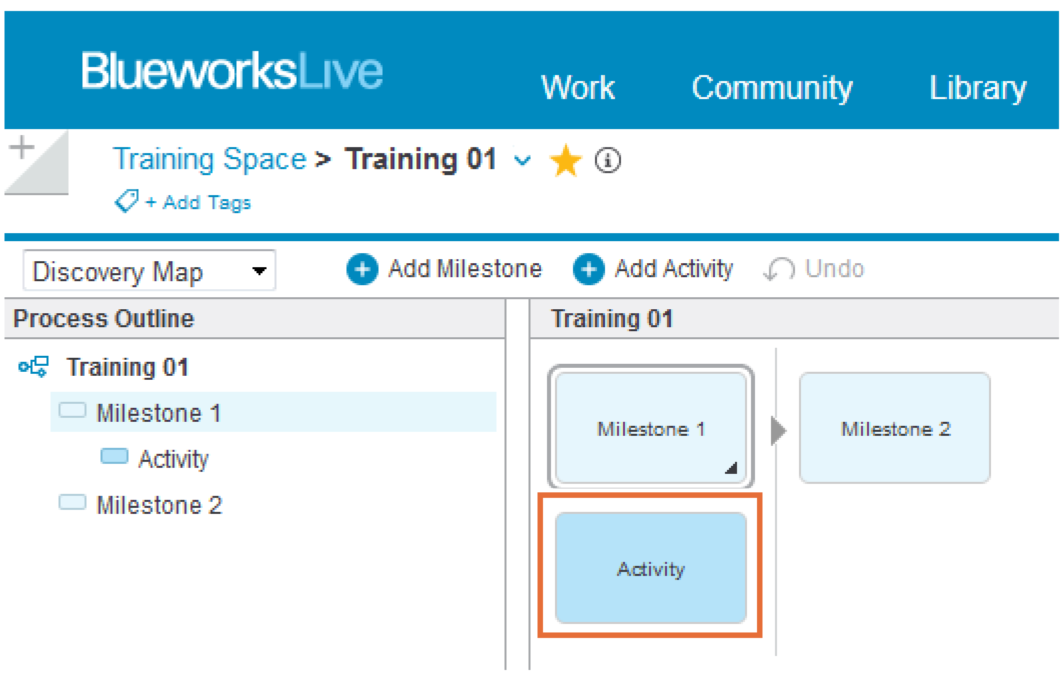
__ b. Click the **Processes** tab.



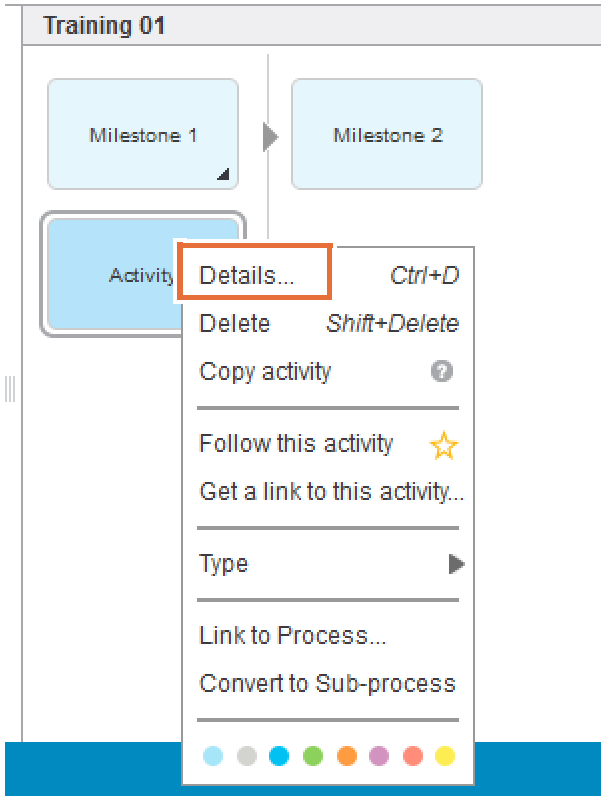
__ c. Click the **Training 01** process.



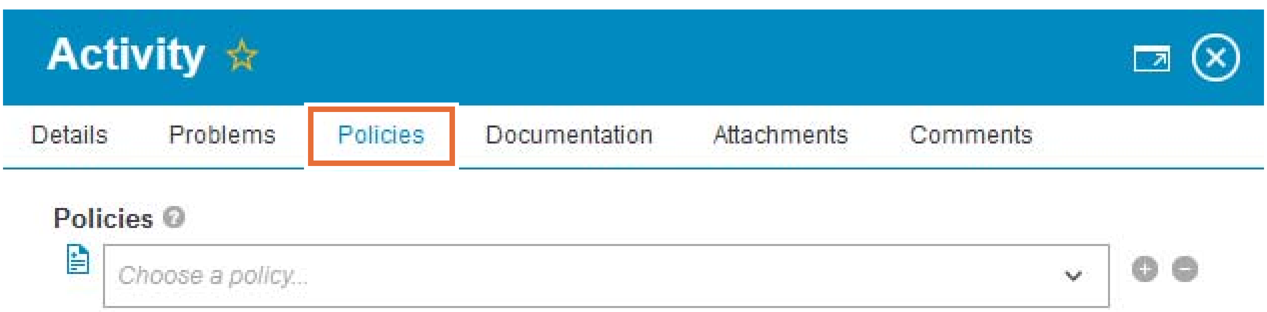
__ d. Right-click the blue **Activity** in the `Discovery Map`.



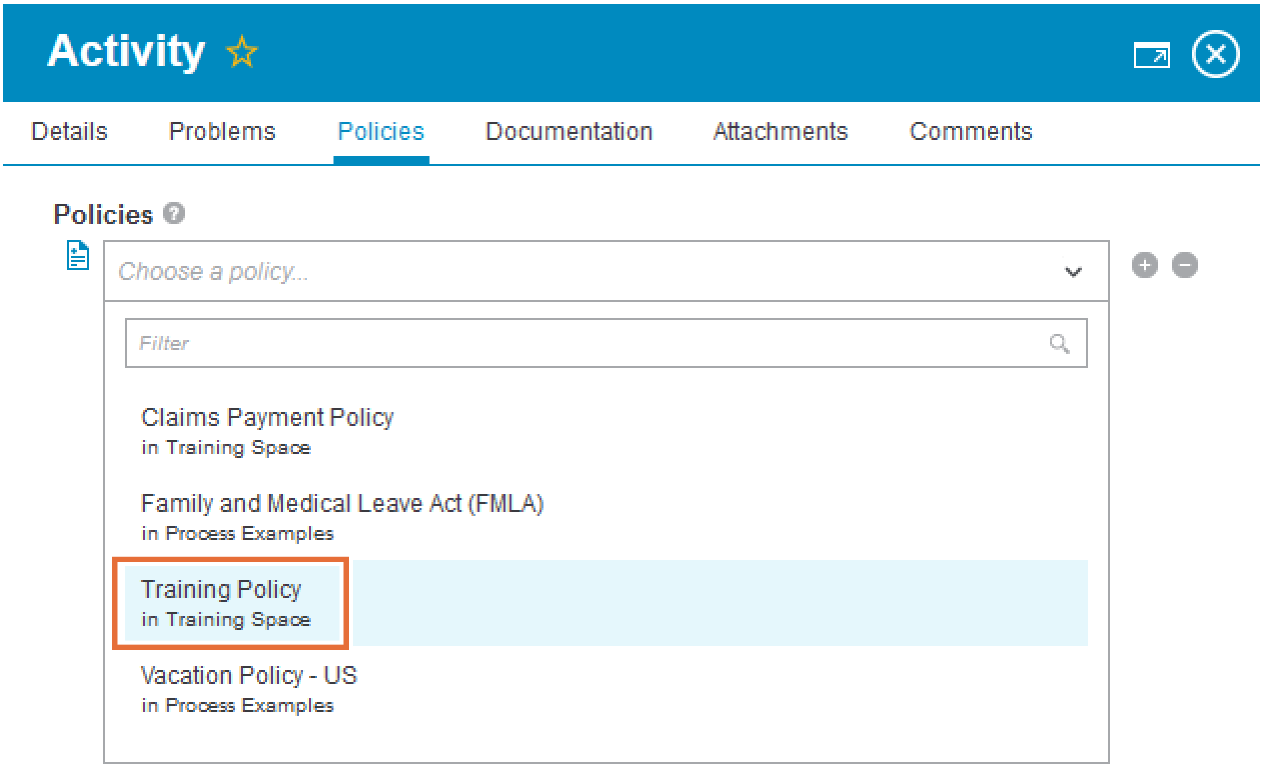
__ e. Select the **Details** option.



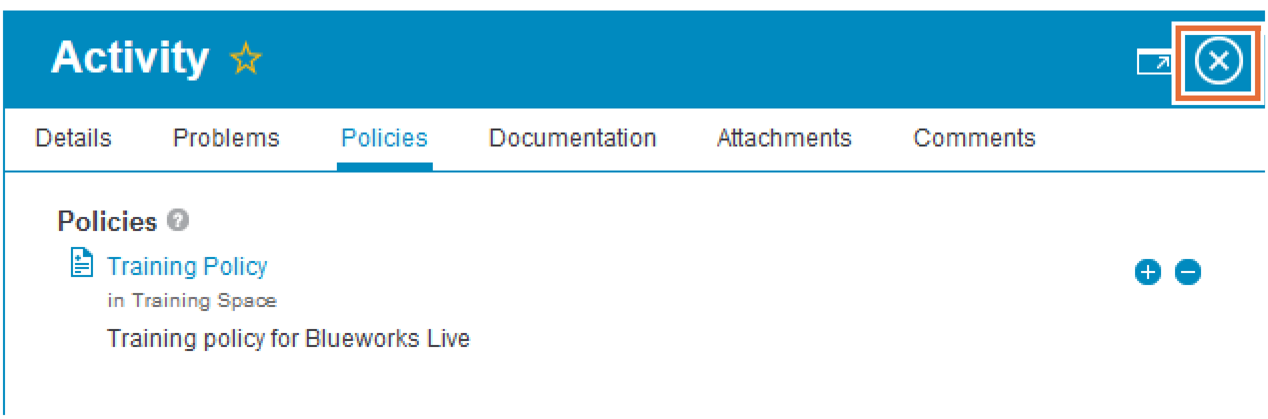
__ f. Click the **Policies** tab in the Activity dialog box.



__ g. Select the **Training Policy** from the policies list.



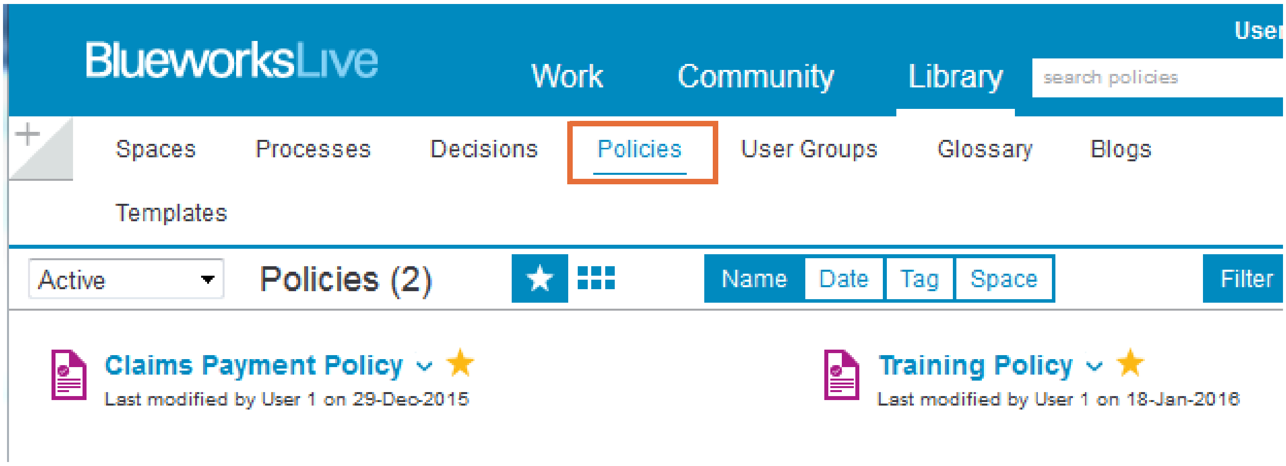
__ h. Click **X** to complete the policy addition.



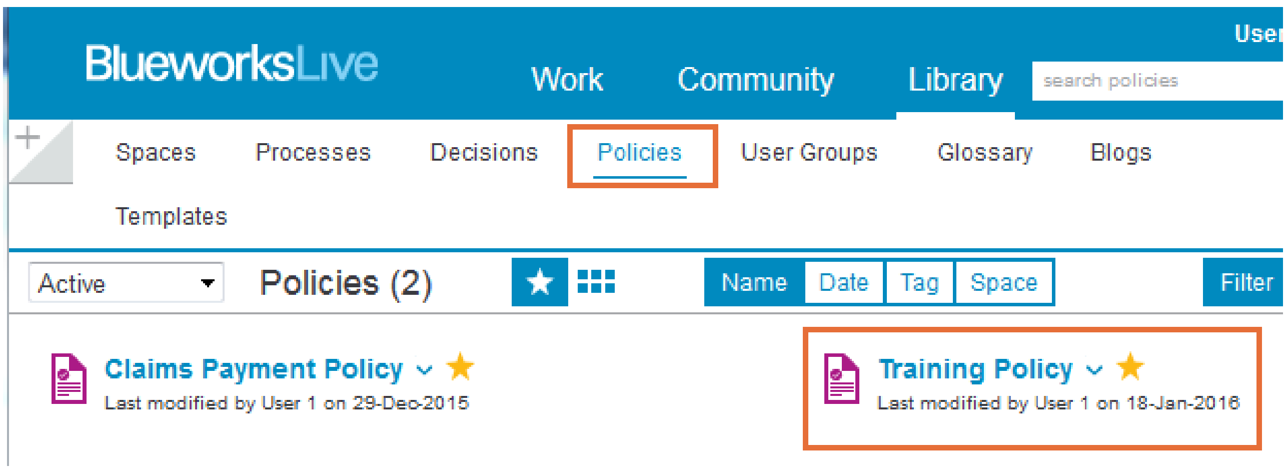
__ 2. Verify **Where Used** for the policy.

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

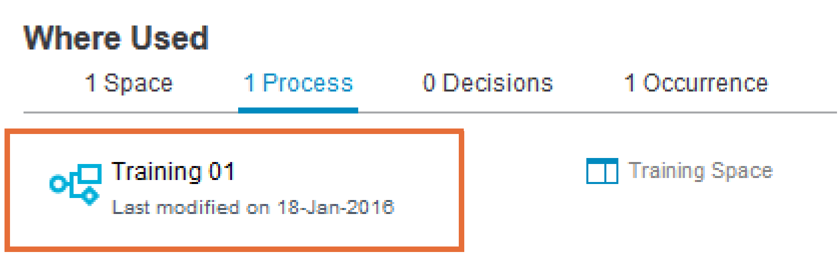
__ b. Click the **Policies** tab.



__ c. Click **Training Policy**.



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



End of exercise

Exercise review and wrap-up

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

Exercise 6. Conducting a playback

What this exercise is about

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

What you should be able to do

After completing this exercise, you should be able to:

- Conduct a playback in Blueworks Live

Introduction

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

Requirements

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

Exercise instructions

Preface

This exercise depends on a Blueworks Live account access.

Part 1: Prepare the process diagram for a playback

Note

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

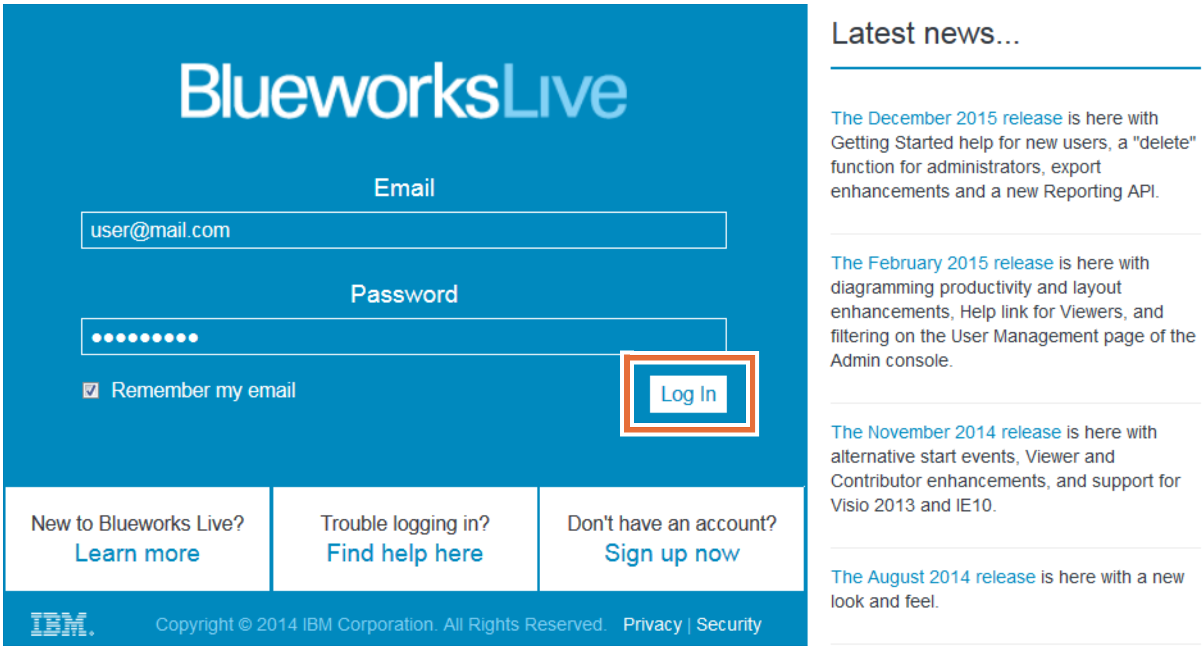
__ 1. Log on to Blueworks Live.

__ a. Open a web browser and enter the following URL:

`https://www.blueworkslive.com/`

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

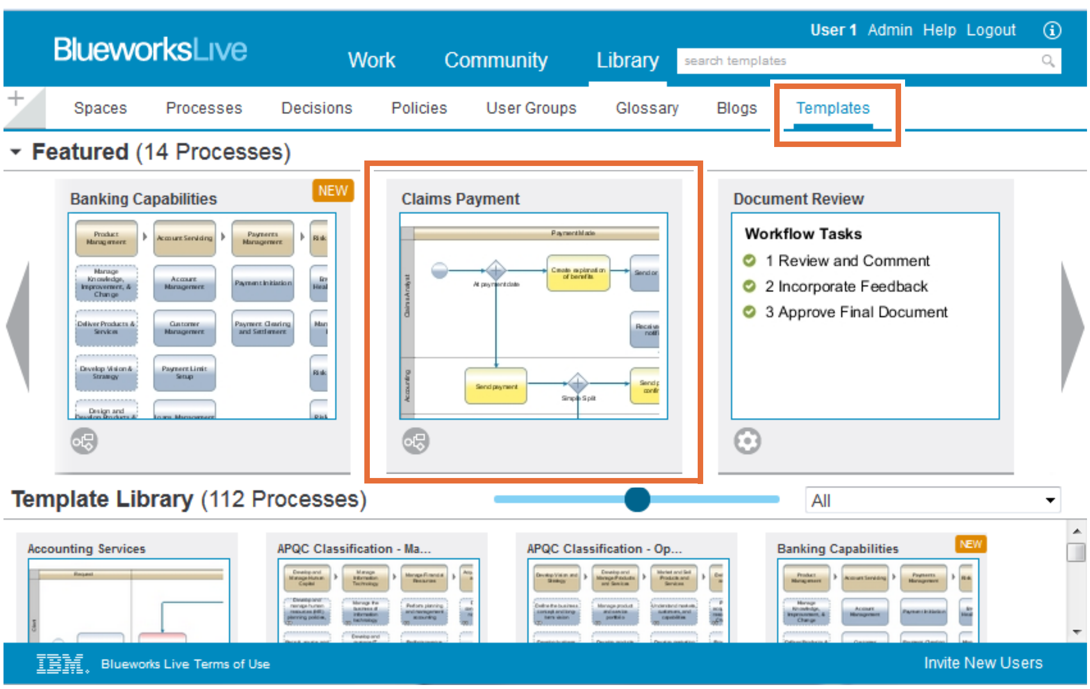
__ c. Enter the account email address, password, and click **Log In**.



__ 2. Import the **Claims Payment** template.

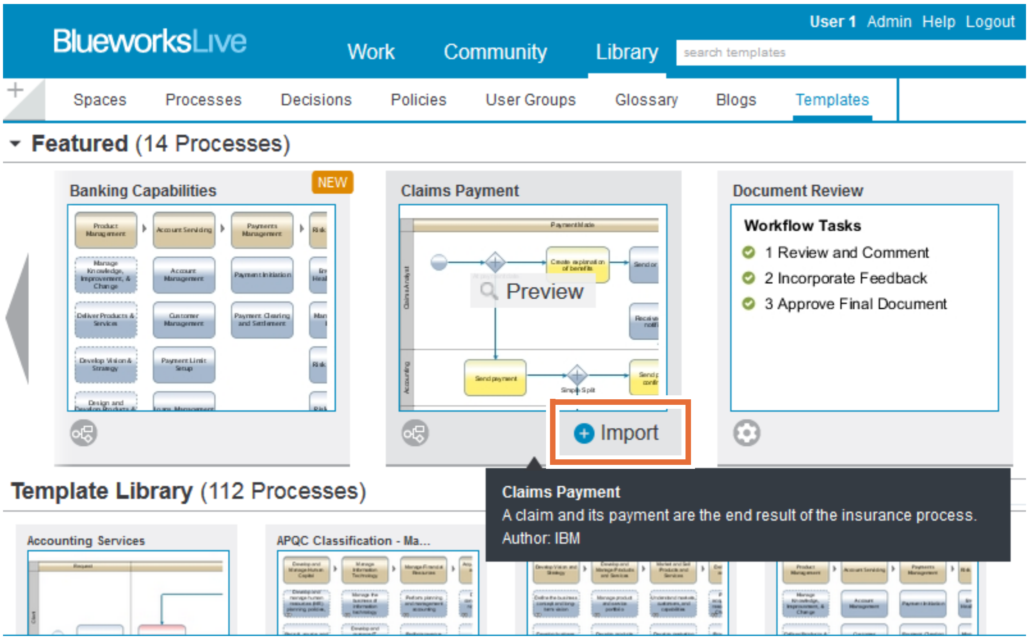
__ a. Click **Library** at the top of the Blueworks Live interface.

__ b. Click the **Templates** tab.

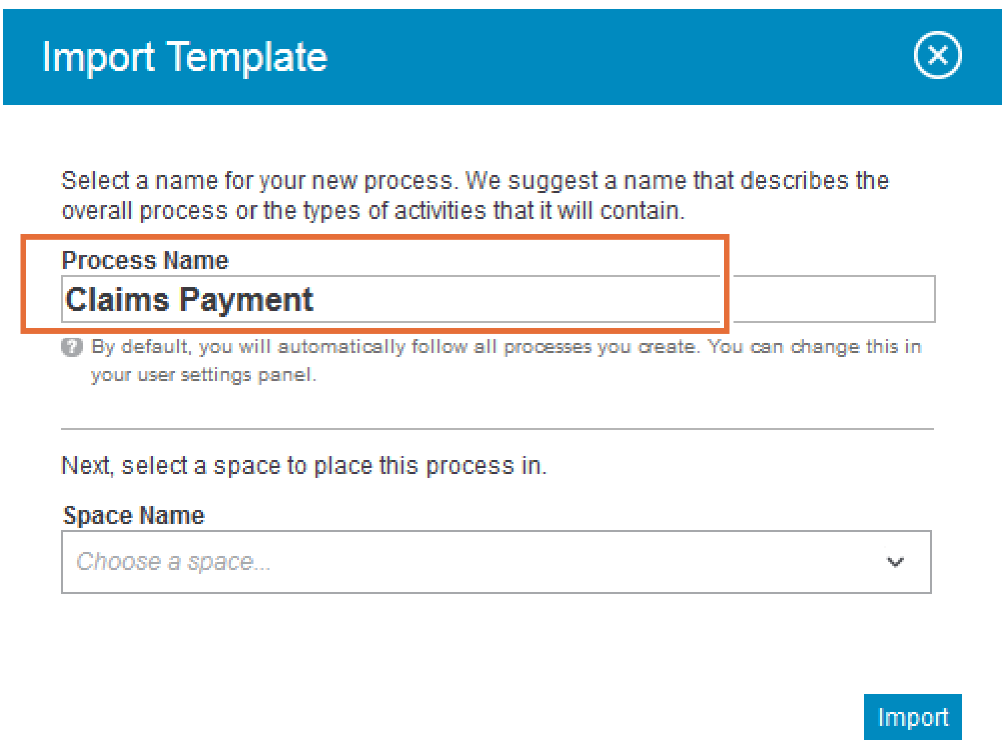


__ c. Hover the cursor over the **Claims Payment** template.

__ d. Click **Import**.

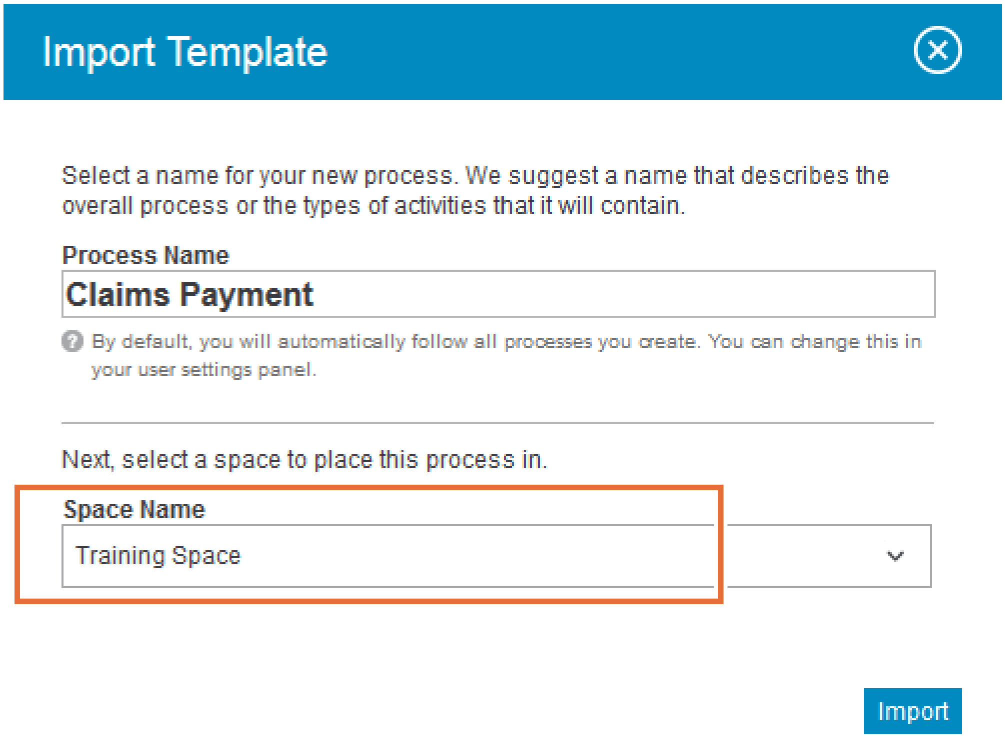


__ e. Leave the name of the process the same as **Claims Payment**.

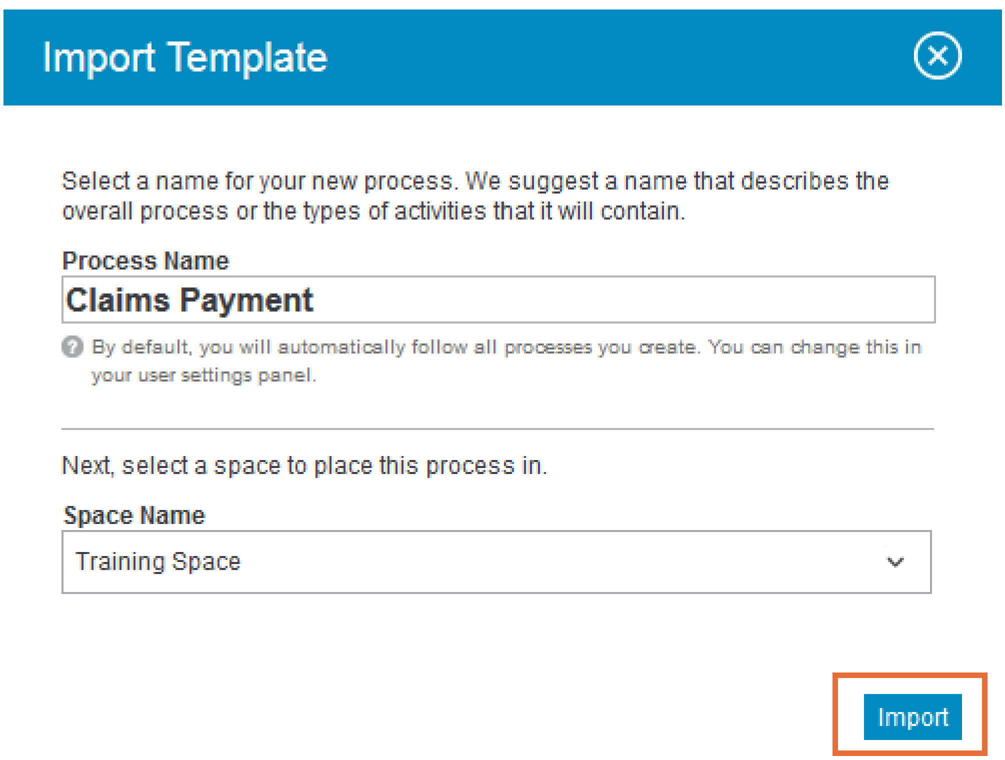


__ f. Select a space to save the template import from the **Space Name** list.

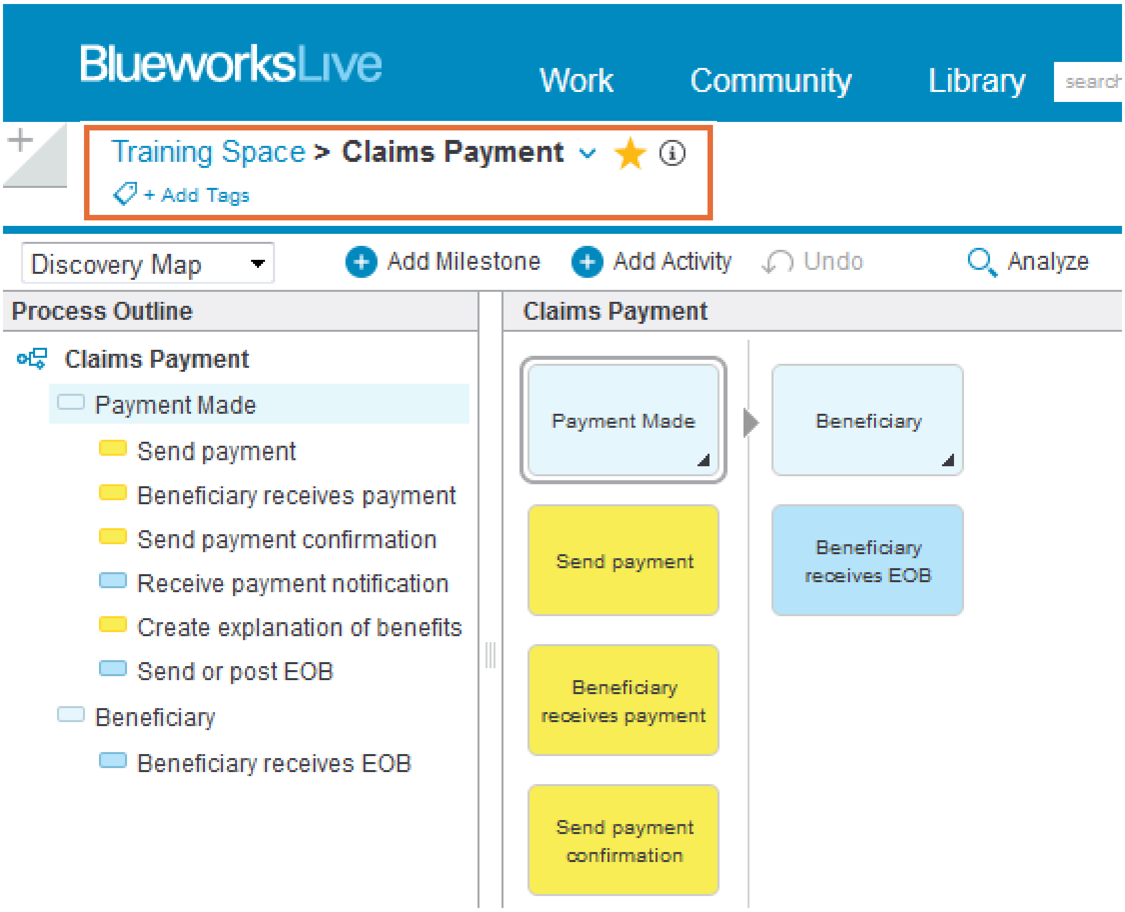
__ g. Scroll to find the **Training Space** and click the name.



__ h. Click **Import** to complete the import.

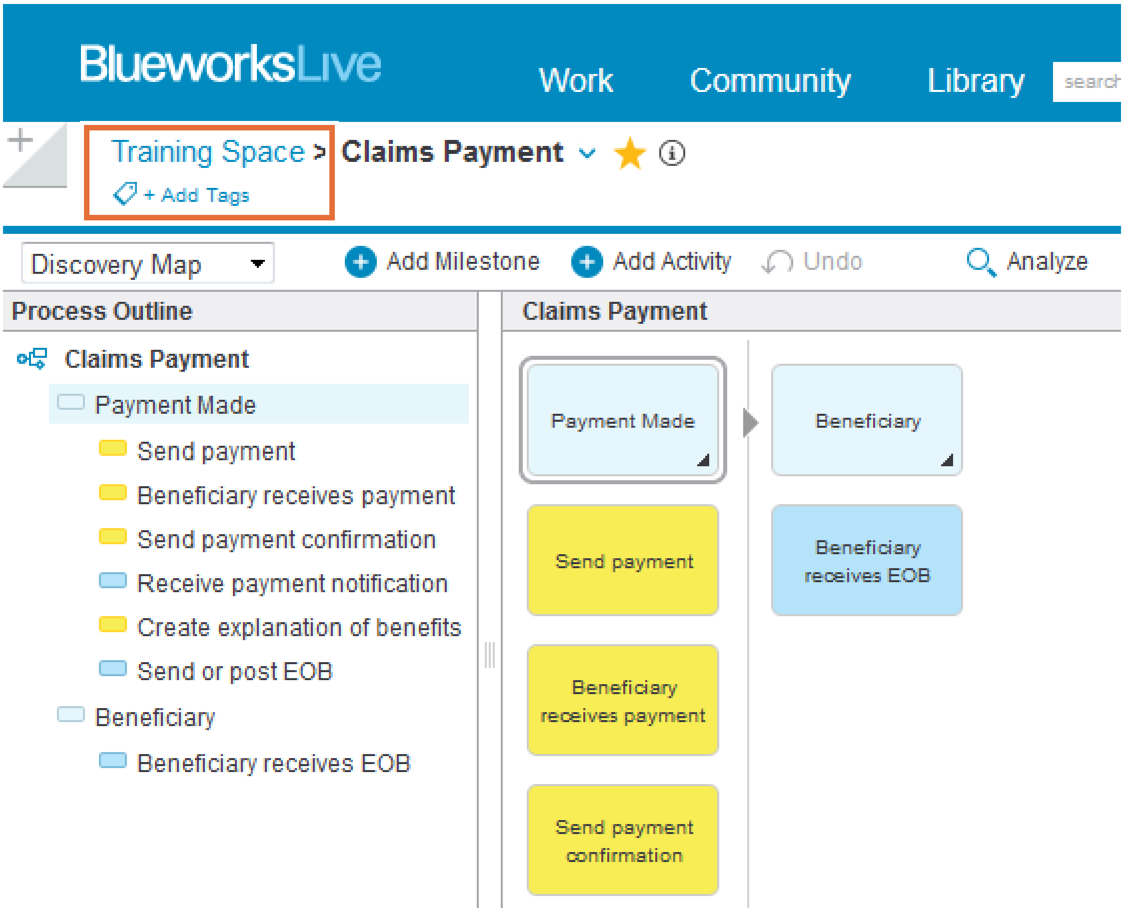


__ i. Verify that the Discovery Map is of the **Claims Payment** process in the **Training Space** at the top of the interface.

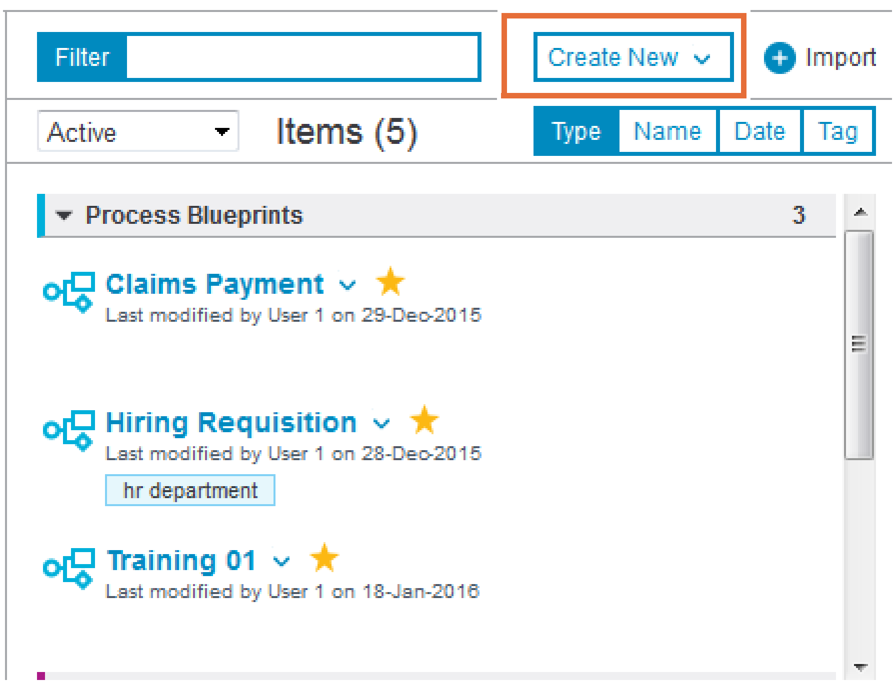


__ 3. Create a policy.

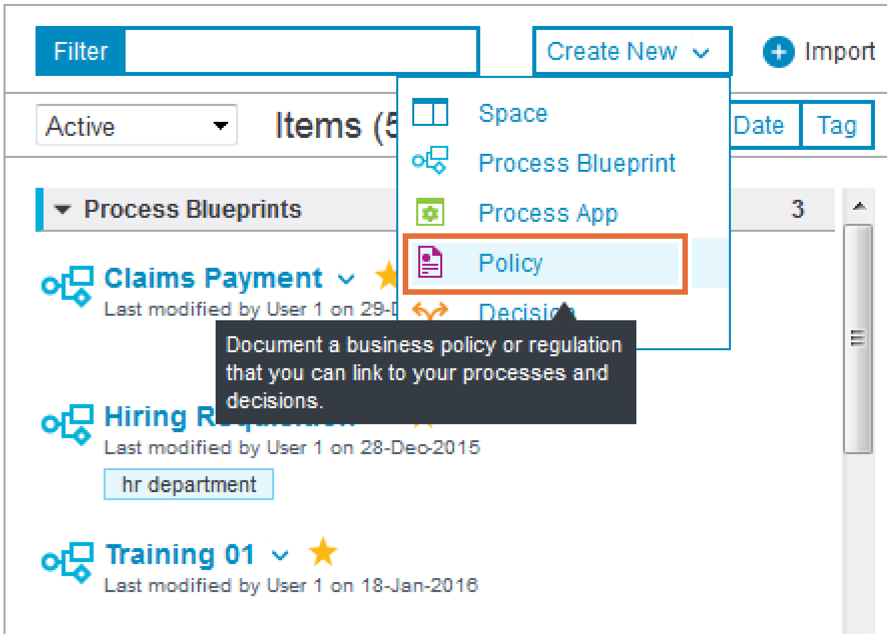
__ a. Click the **Training Space** link at the top of the **Discovery Map** interface.



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

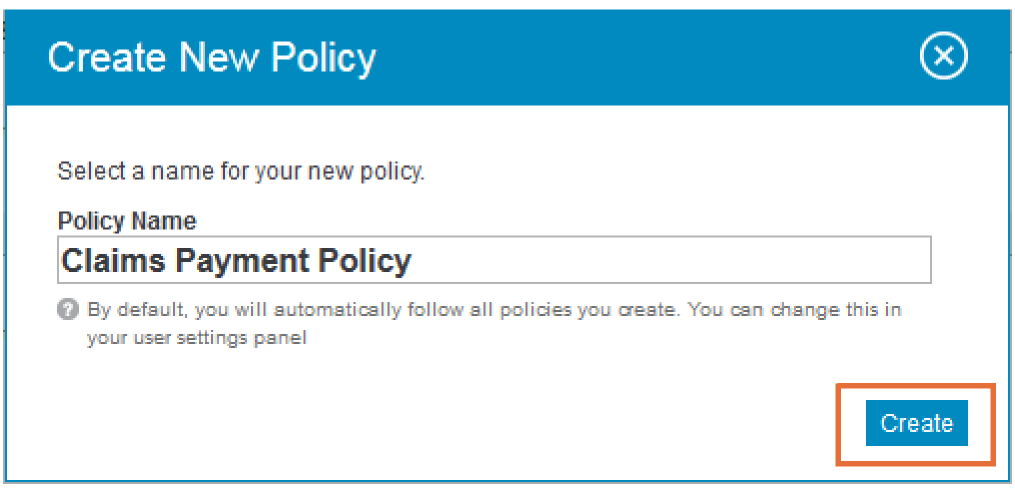


__ c. Select the **Policy** option.



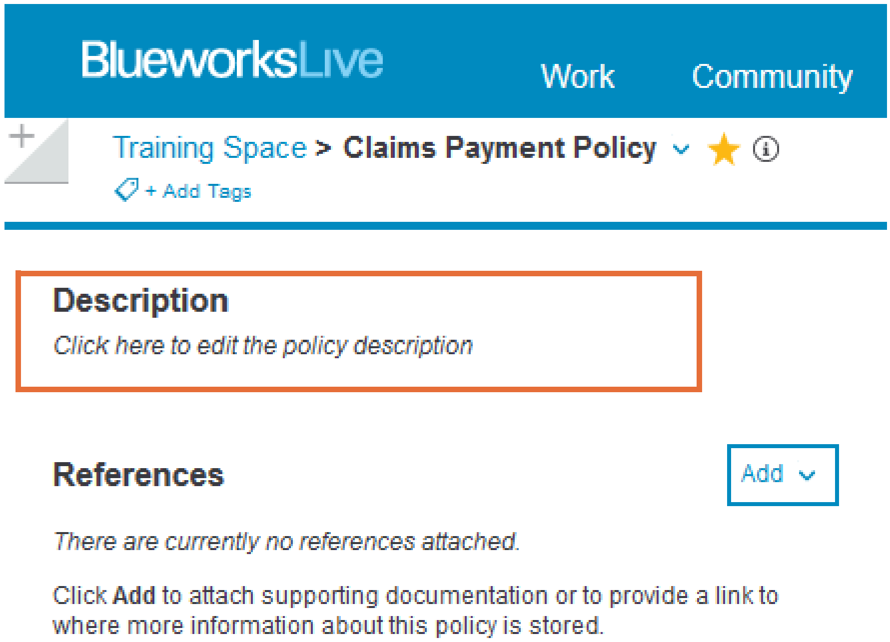
__ d. Name the policy: `Claims Payment Policy`

__ e. Click **Create** to complete the creation of the policy.

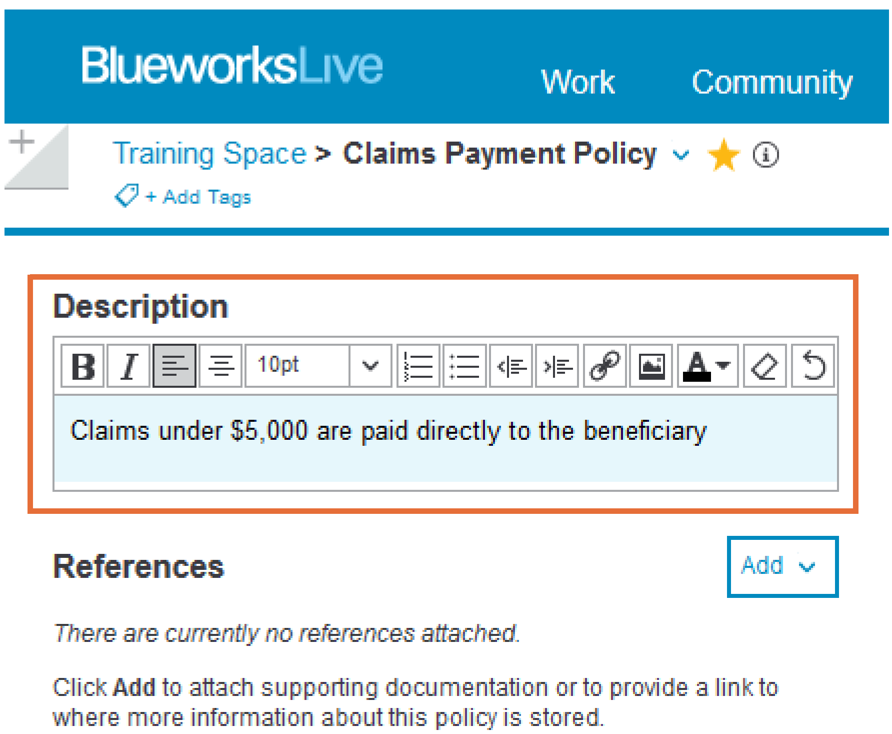


__ 4. Add details to the policy.

__ a. Click the **Description** area to access the editor.



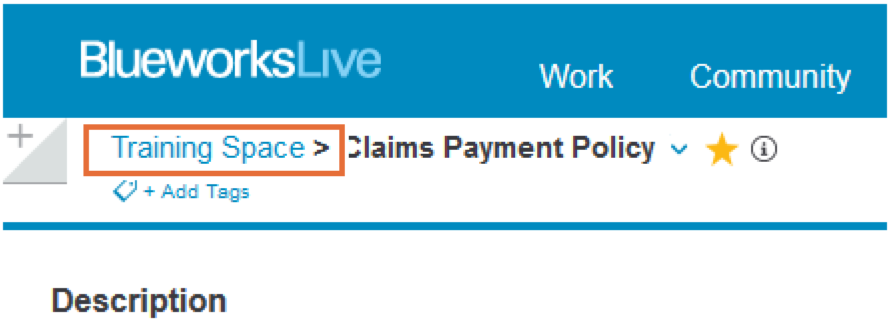
__ b. Add the following description: `Claims under $5,000 are paid directly to the beneficiary`



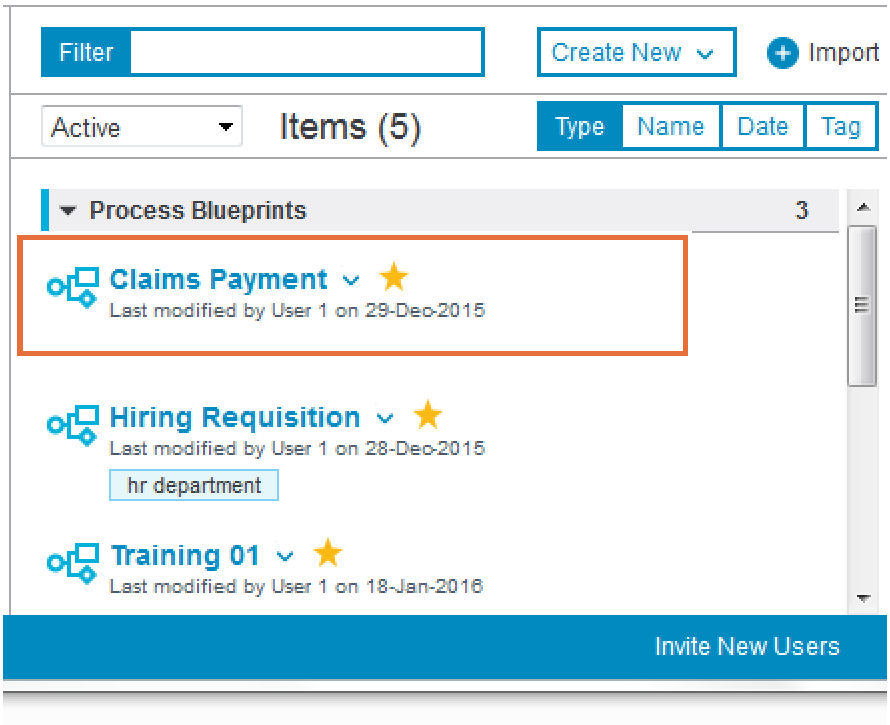
__ c. Click outside the editor to save the description.

__ 5. Add the policy to the process diagram.

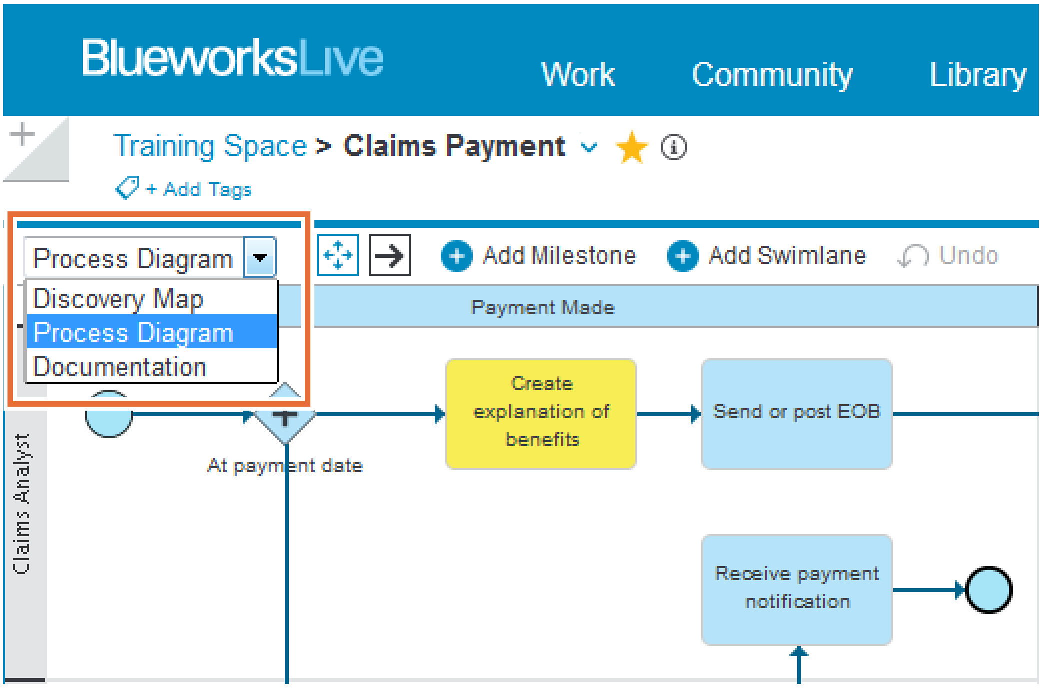
__ a. Click the **Training Space** link at the top of the page.



__ b. Click the **Claims Payment** process on the right side of the space page.

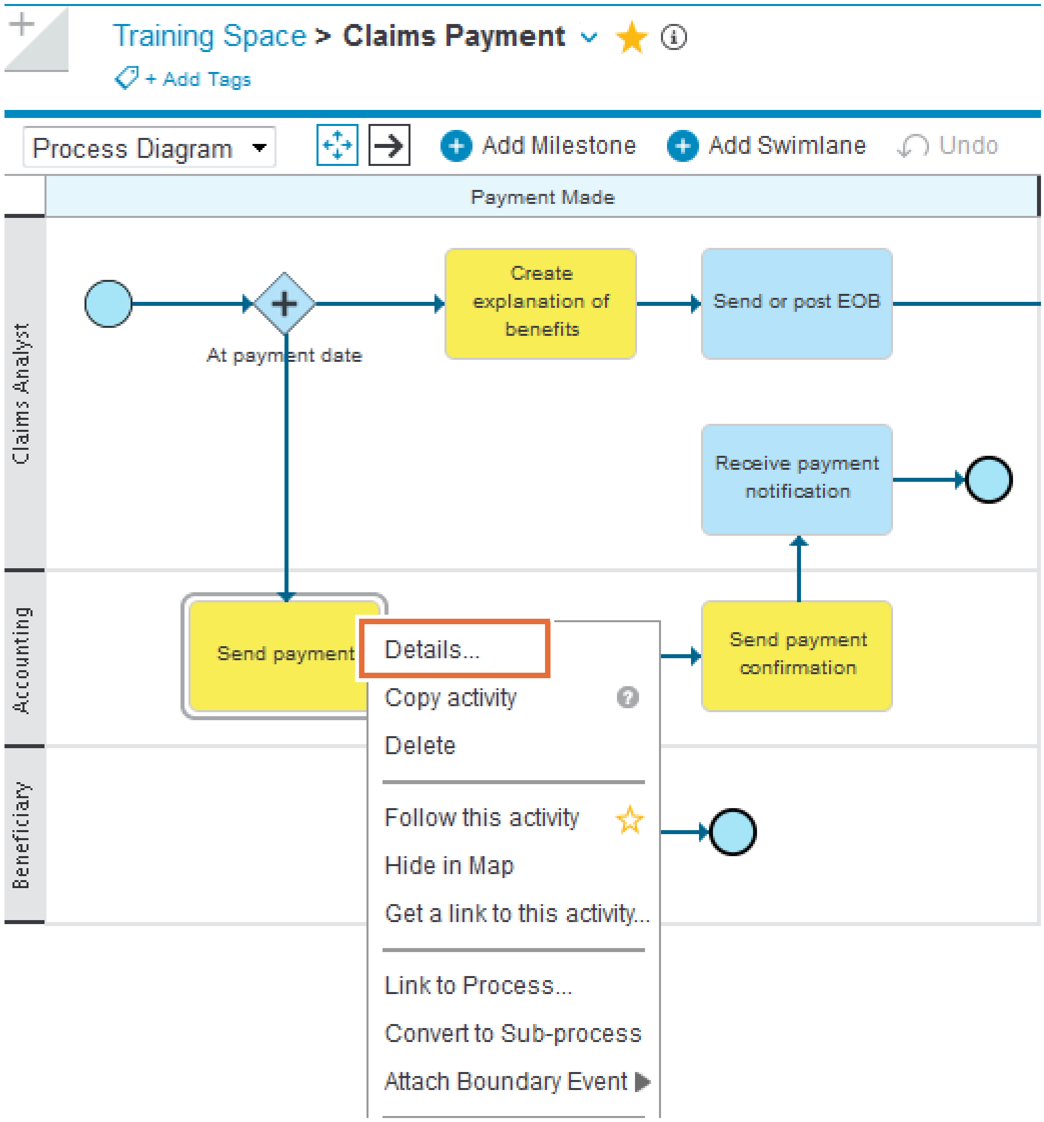


__ c. From the **View** list, select **Process Diagram** to change the view.



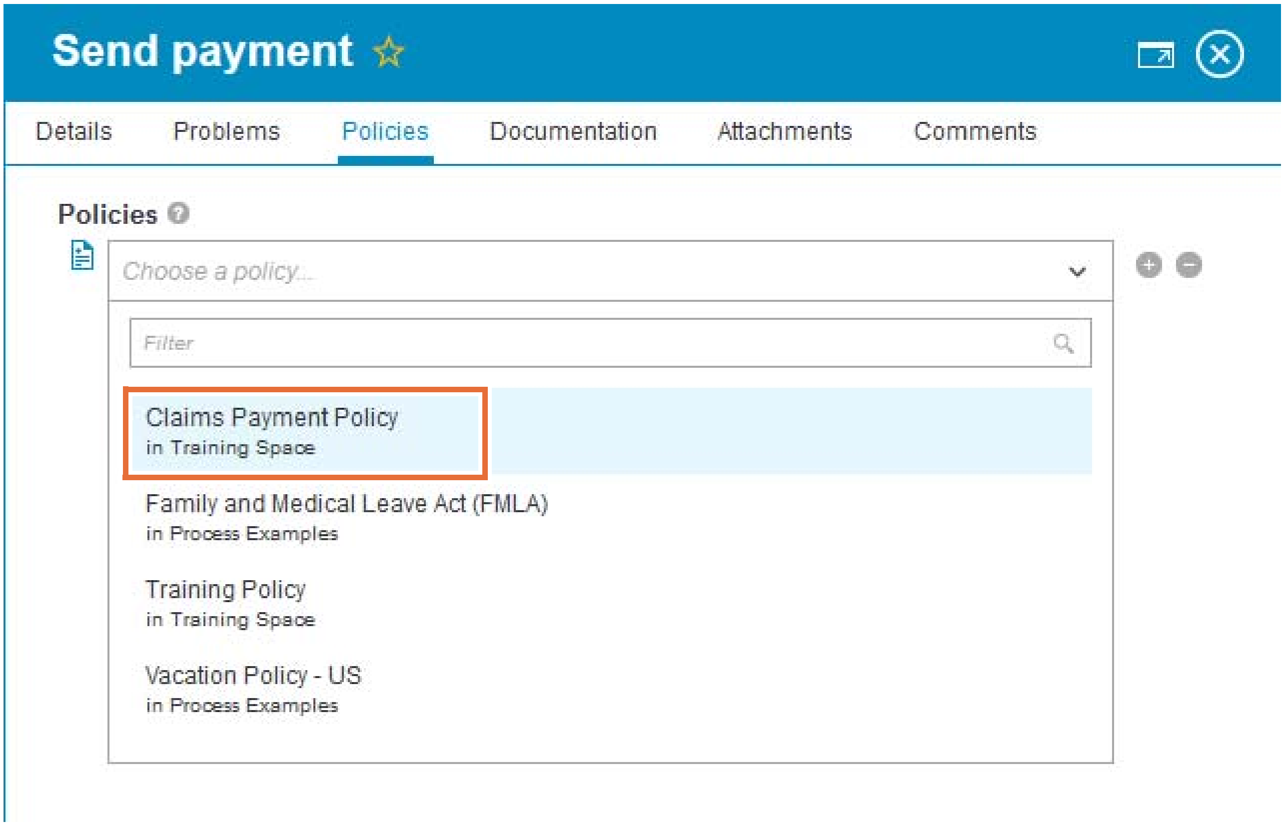
__ d. Right-click the **Send Payment** activity.

__ e. Select the **Details** option.



__ f. Click the **Policies** tab.

__ g. From the **Choose a policy** list, select **Claims Payment Policy**.

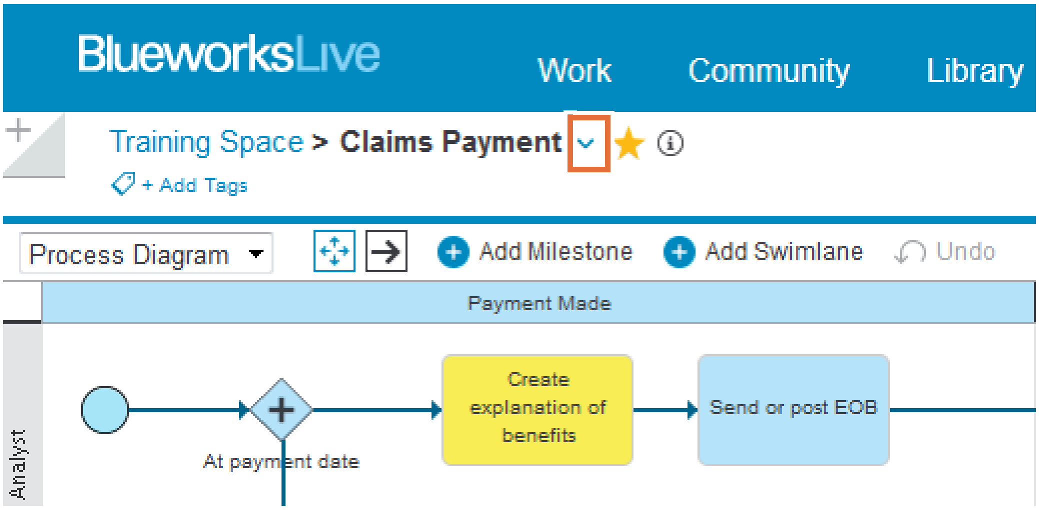


__ h. Click **X** to close the dialog box.

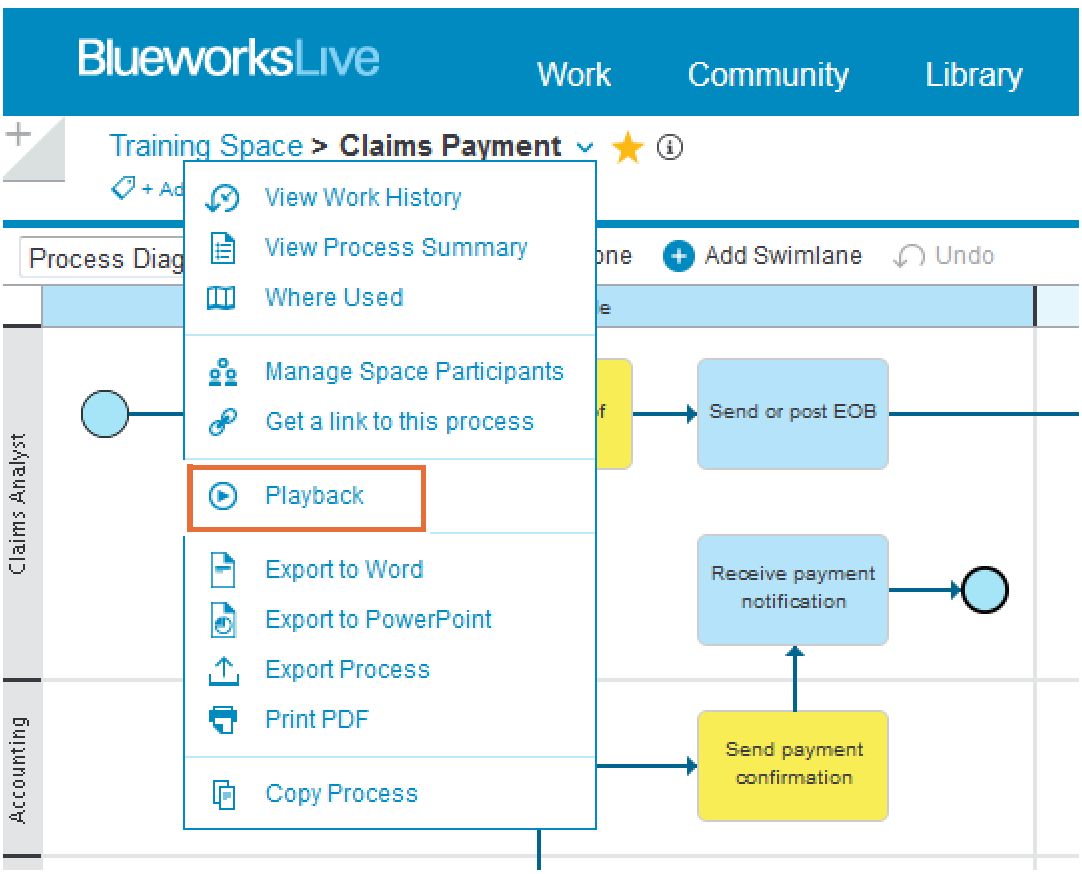
Part 2: Play back the process diagram

__ 1. Set up the first playback path.

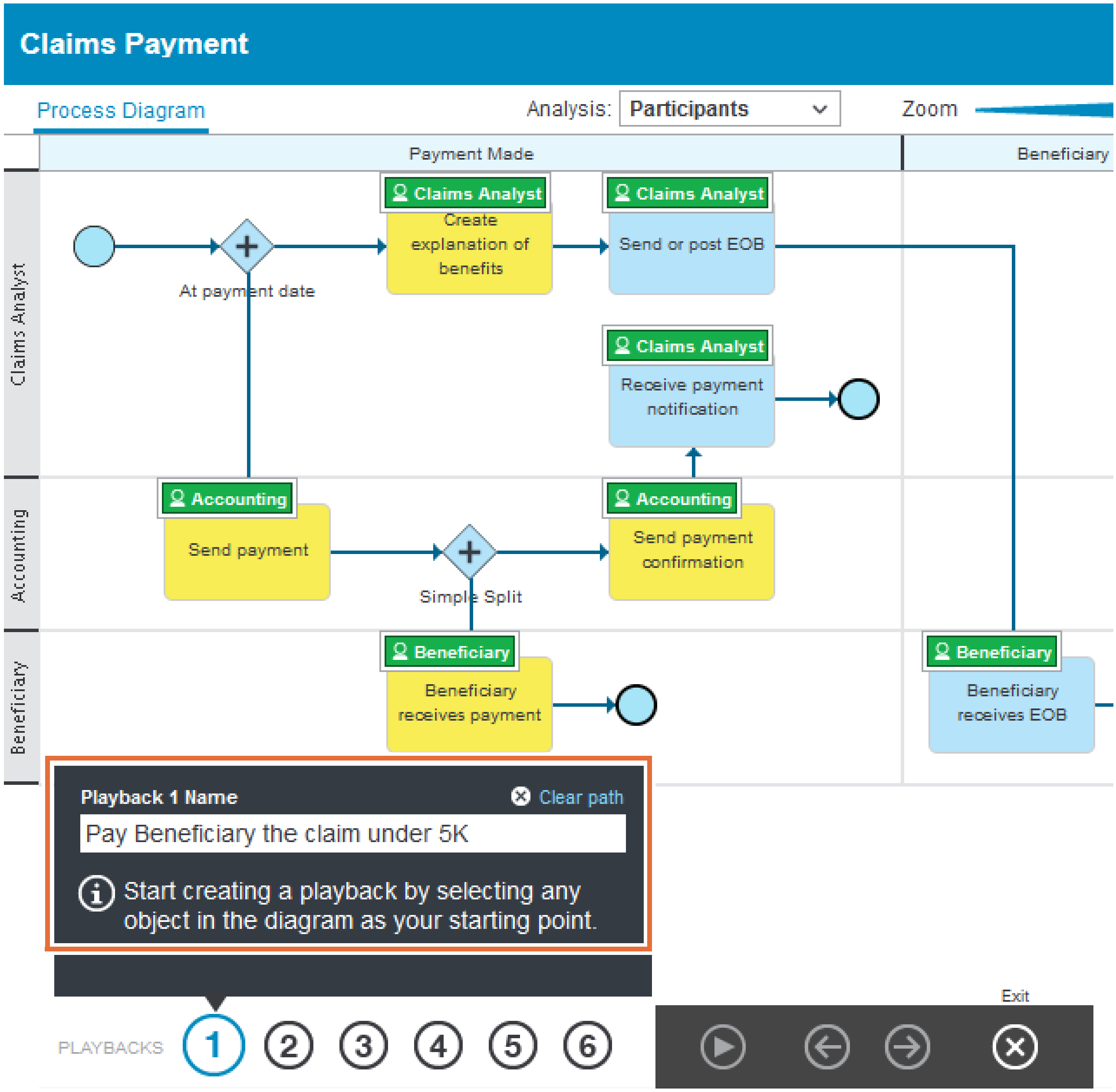
__ a. Expand **Training Space > Claims Payment** at the top of the process diagram page.



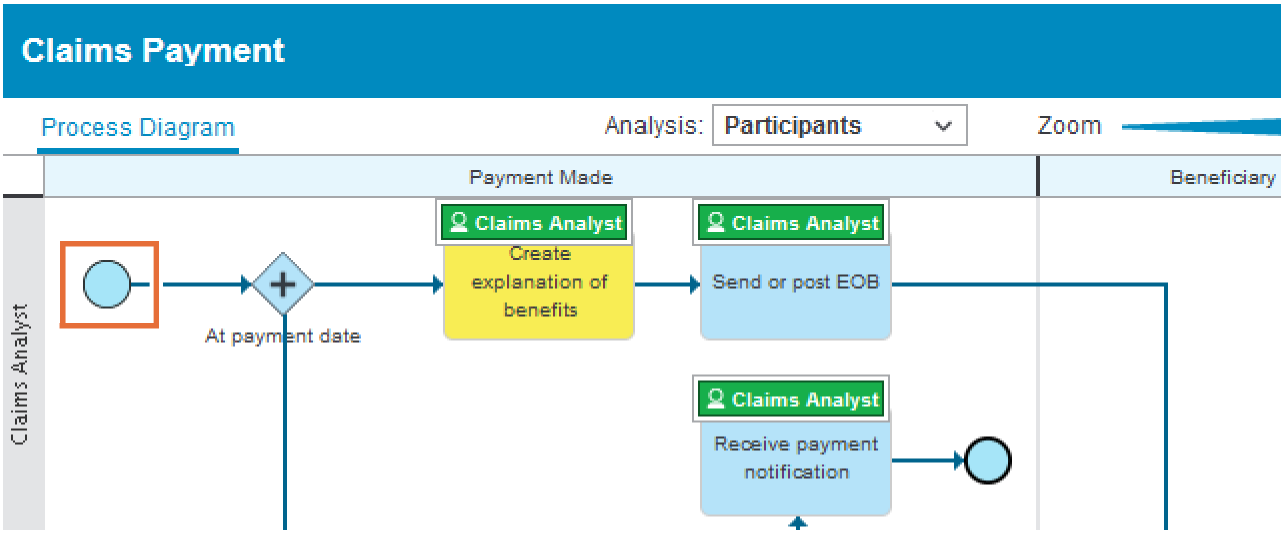
__ b. Click **Playback**.



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



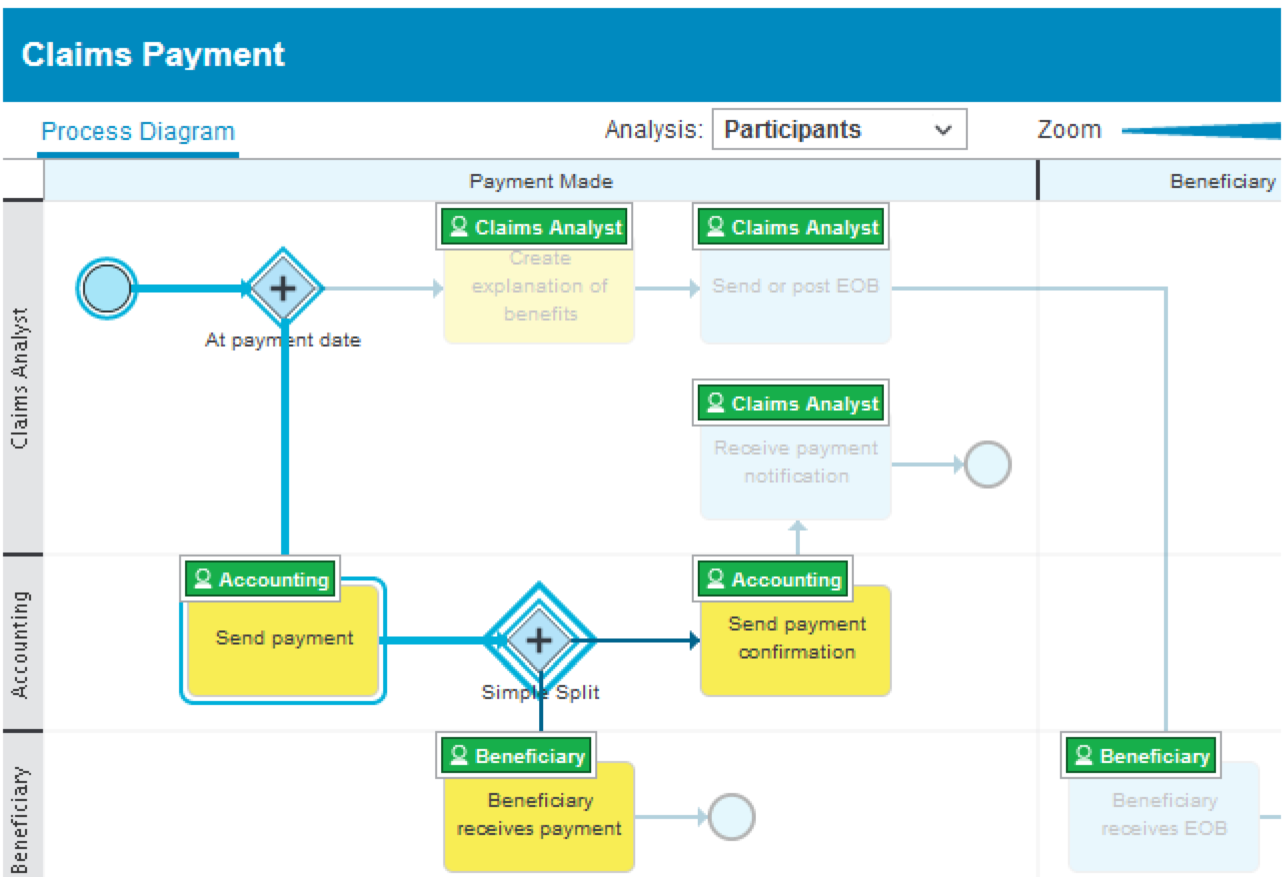
__ d. Click the **Start** event in the left side of the diagram.



__ e. Click the **At payment date** gateway.

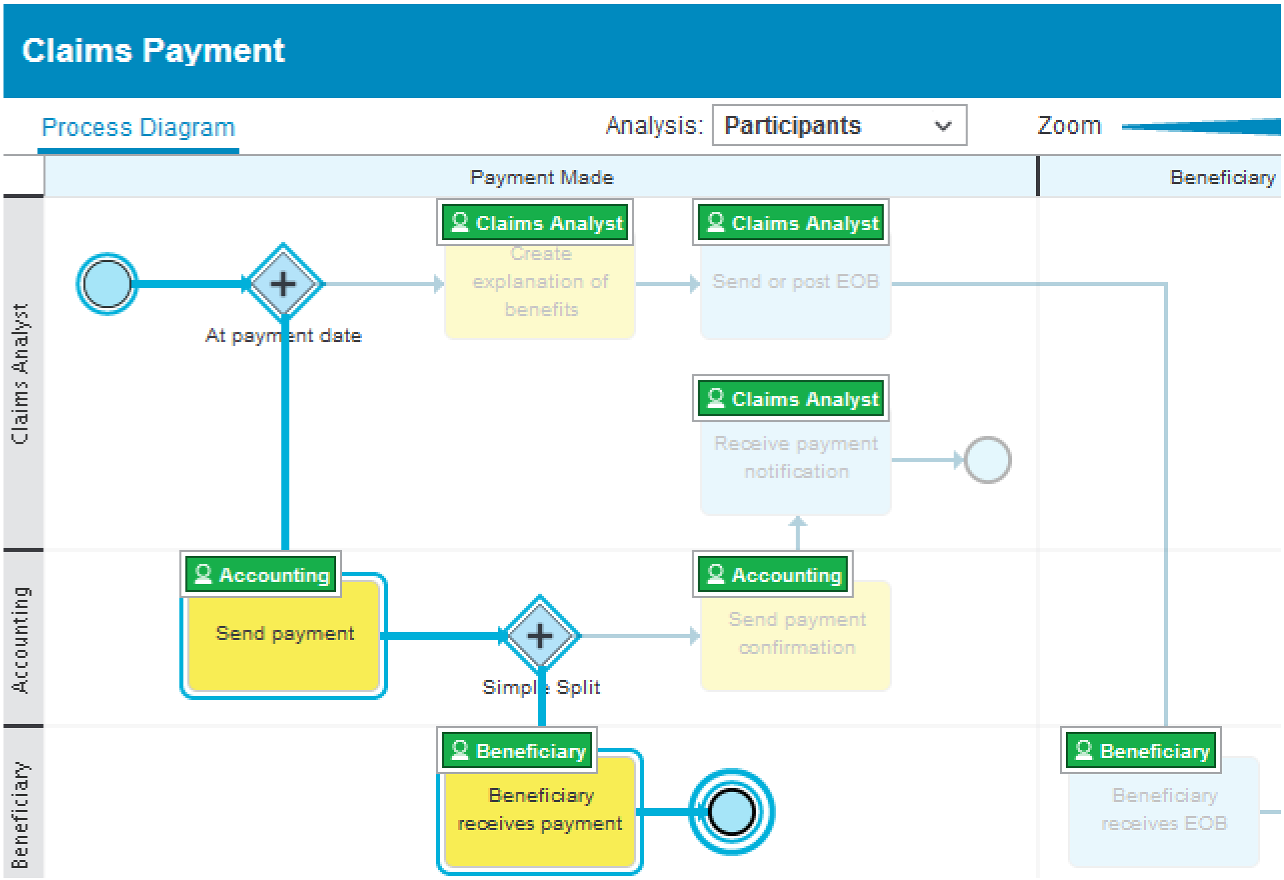
__ f. Click the **Send payment** activity.

__ g. Click the **Simple Split** gateway.



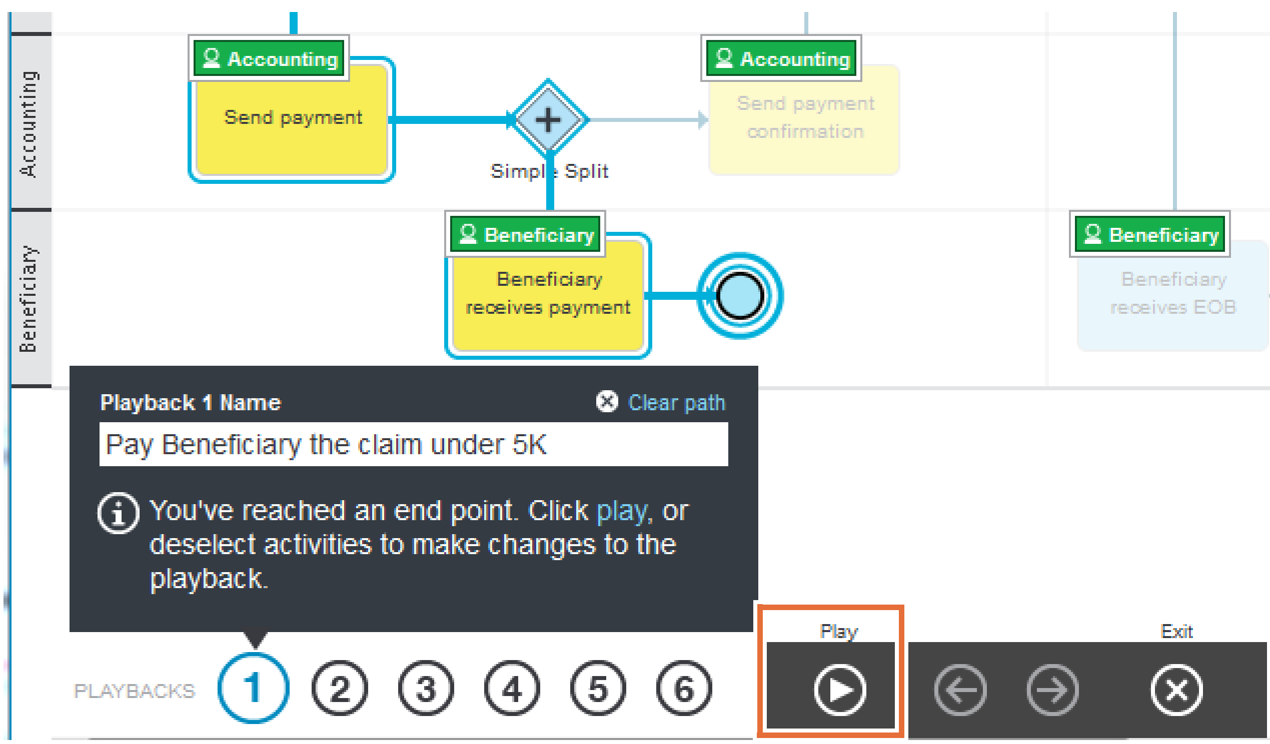
__ h. Click the activity that is labeled **Beneficiary receives payment**.

__ i. Click the **End** activity. The number one path is complete.

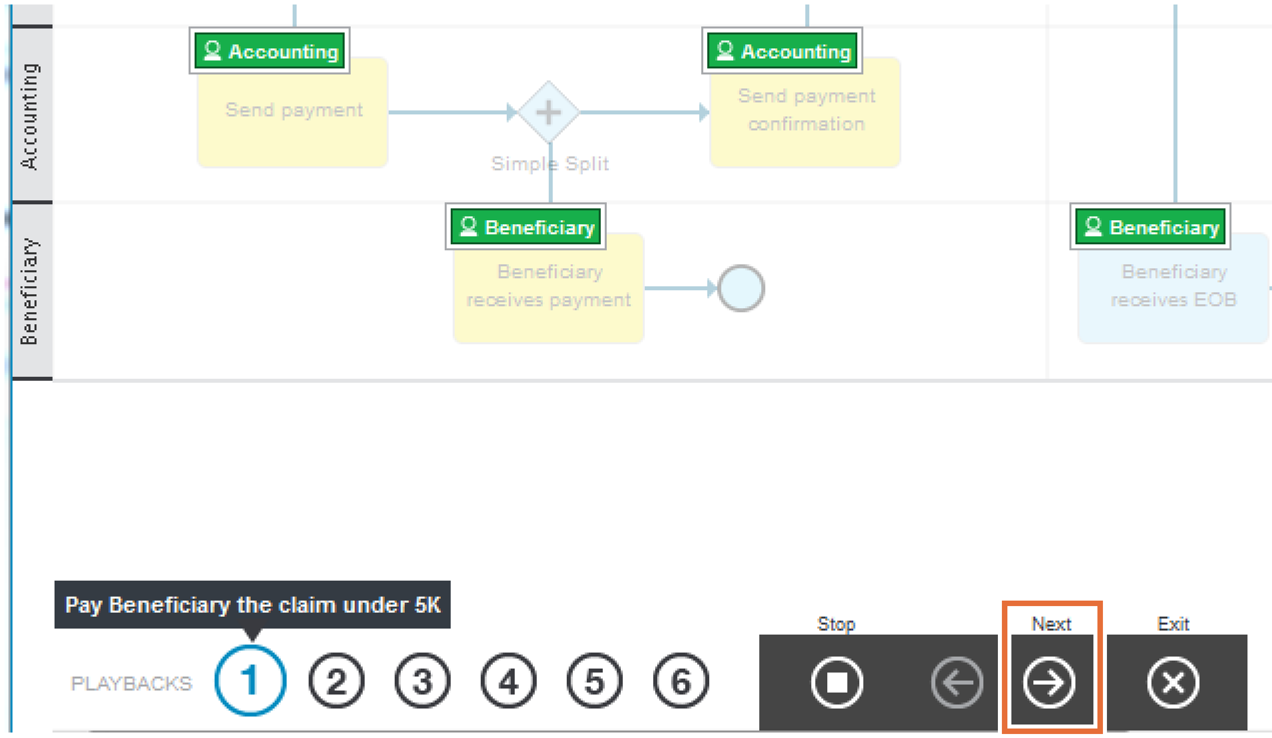


__ 2. Play back path 1.

__ a. Click the **Play** icon.



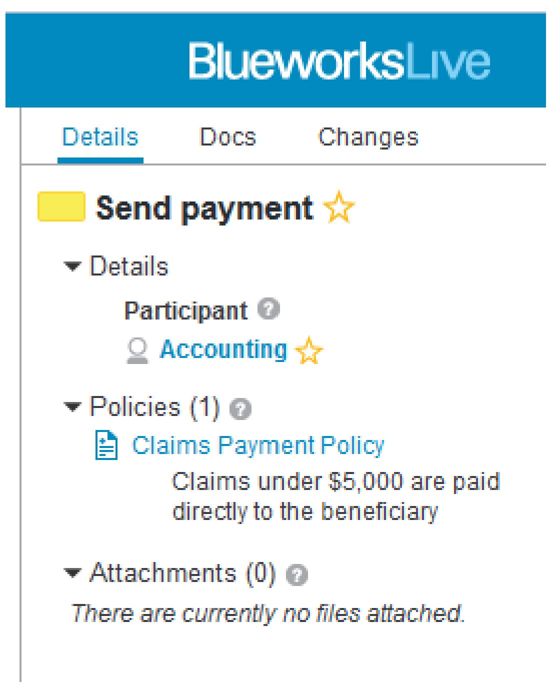
__ b. Click the **Next** icon one time for each element in the path, beginning with the **Start** event.



__ c. Click the **Next** icon to move to the **At payment date** gateway.

__ d. Click the **Next** icon to move to the **Send payment** activity.

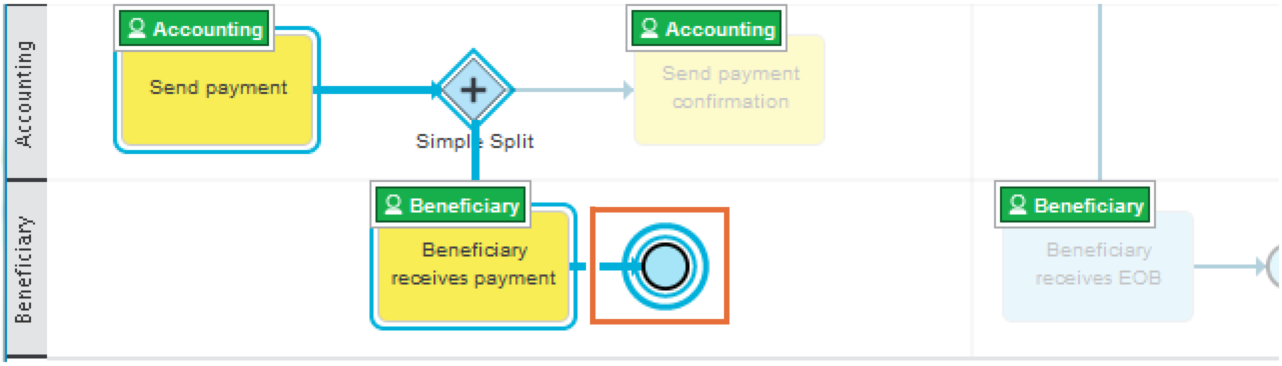
__ e. Verify that the details are correct at the right side of the window.



__ f. Click the **Next** icon to move to the **Simple Split** gateway.

__ g. Click the **Next** icon to move to the **Beneficiary receives payment** activity.

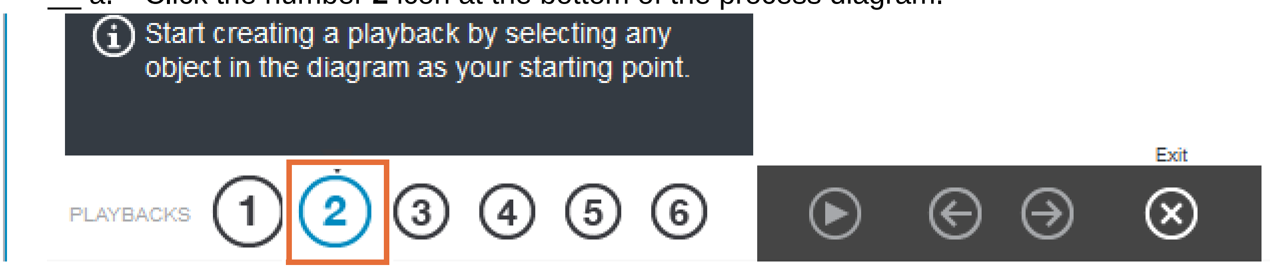
__ h. Click the **Next** icon to move to the **End** event.



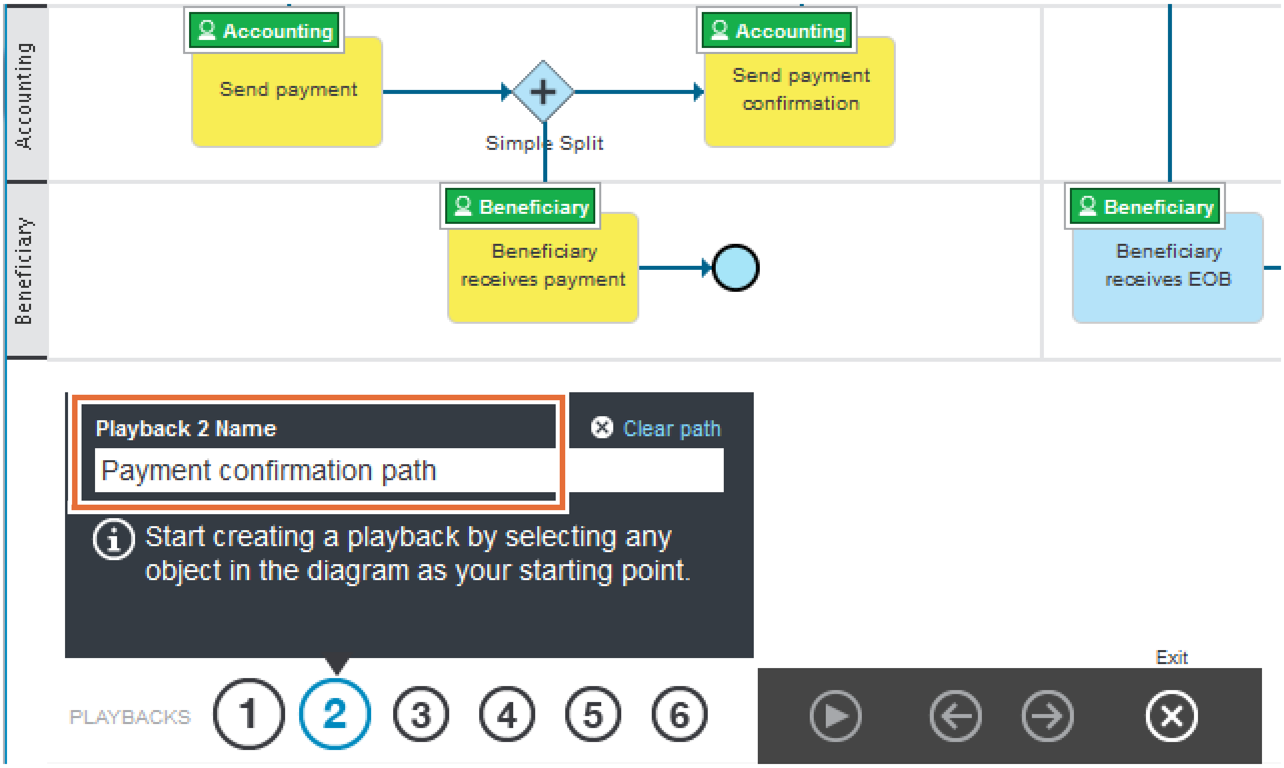
__ i. Verify that the playback for path 1 is complete.

__ 3. Set up the second playback path.

__ a. Click the number **2** icon at the bottom of the process diagram.



__ b. Enter a name for the playback path: `Payment confirmation path`



__ c. Click the **Start** event in the left side of the diagram.

__ d. Click the **At payment date** gateway.

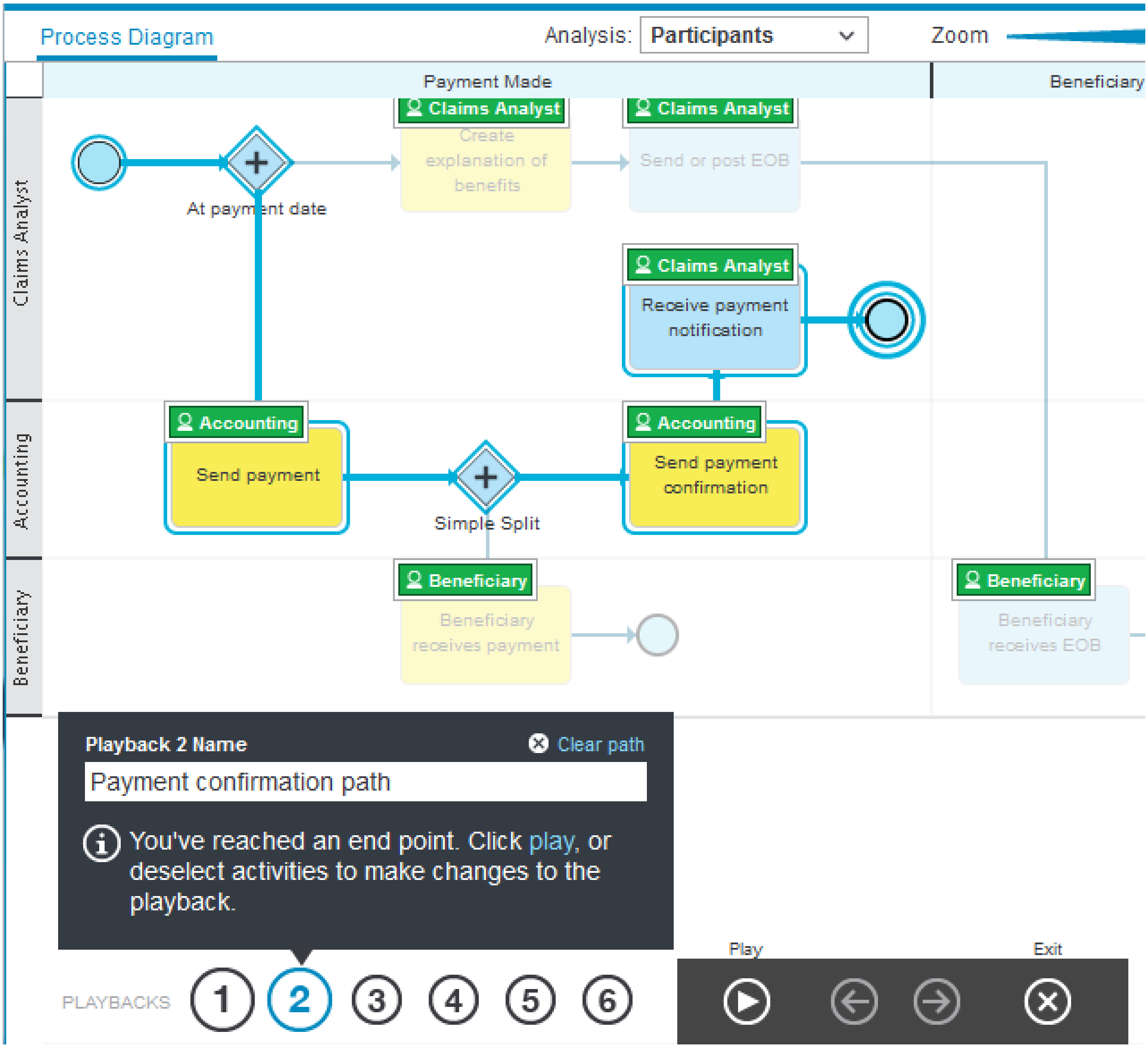
__ e. Click the **Send payment** activity.

__ f. Click the **Simple Split** gateway.

__ g. Click the **Send payment confirmation** activity.

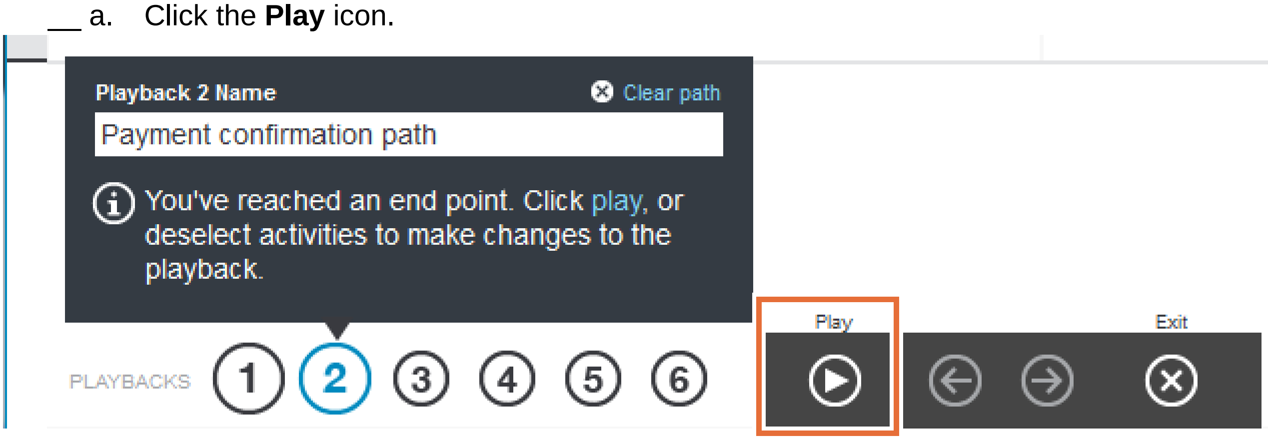
__ h. Click the **Receive payment notification** activity.

__ i. Click the **End** event. The number two path is complete.



__ 4. Play back path 2.

__ a. Click the **Play** icon.



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

__ c. Click the **Next** icon to move to the **At payment date** gateway.

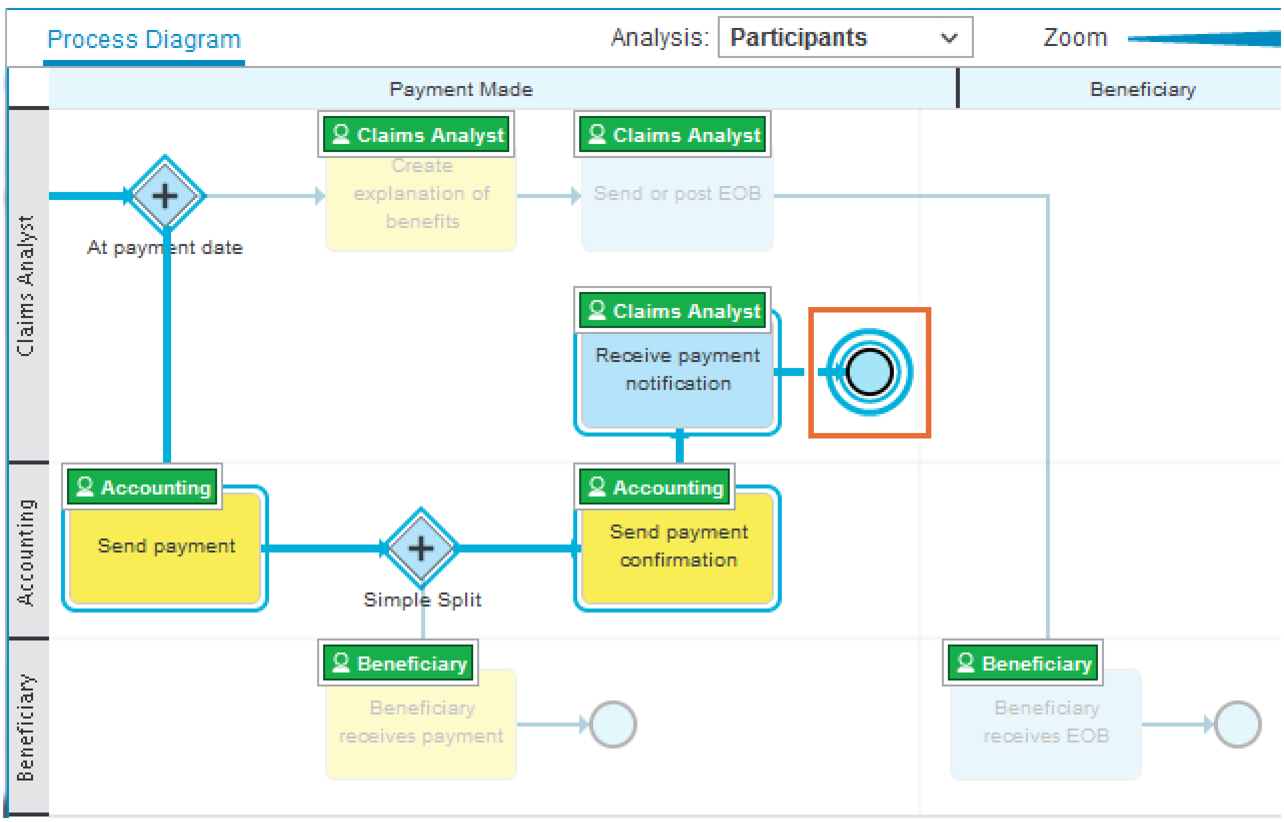
__ d. Click the **Next** icon to move to the **Send payment** activity.

__ e. Click the **Next** icon to move to the **Simple Split** gateway.

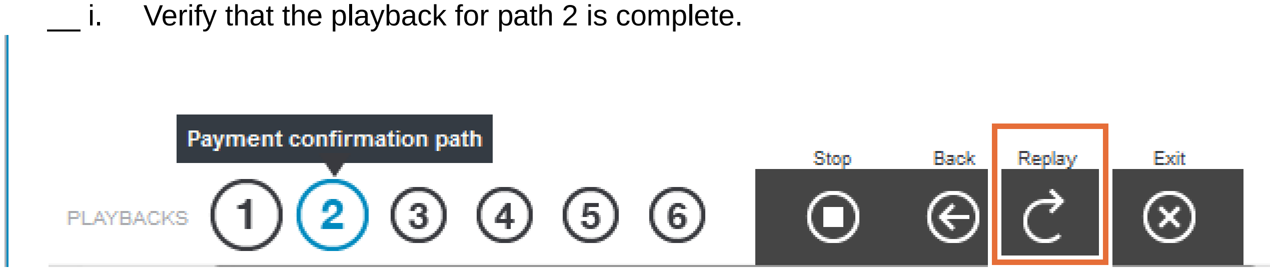
__ f. Click the **Next** icon to move to the **Send payment confirmation** activity.

__ g. Click the **Next** icon to move to the **Receive payment notification** activity.

__ h. Click the **Next** icon to move to the **End** event.



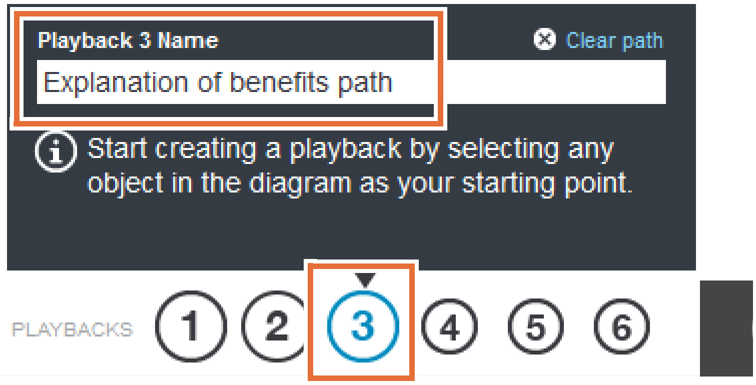
__ i. Verify that the playback for path 2 is complete.



__ 5. Set up the third playback path.

__ a. Click the number **3** icon at the bottom of the process diagram.

__ b. Enter a name for the playback path: `Explanation of benefits path`



__ c. Click the **Start** event in the left side of the diagram.

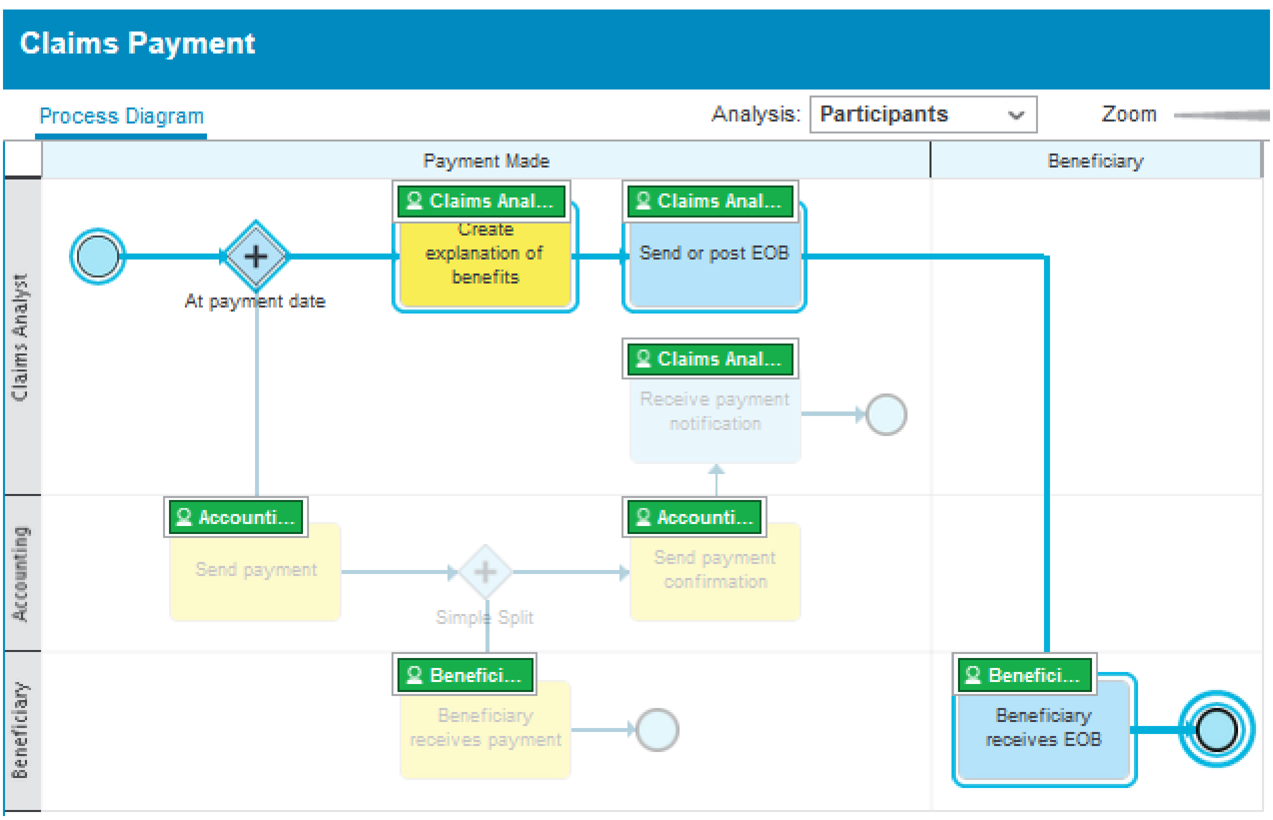
__ d. Click the **At payment date** gateway.

__ e. Click the **Create explanation of benefits** activity.

__ f. Click the **Send or post EOB** activity.

__ g. Click the activity that is labeled **Beneficiary receives EOB**.

__ h. Click the **End** event. The number three path is complete.



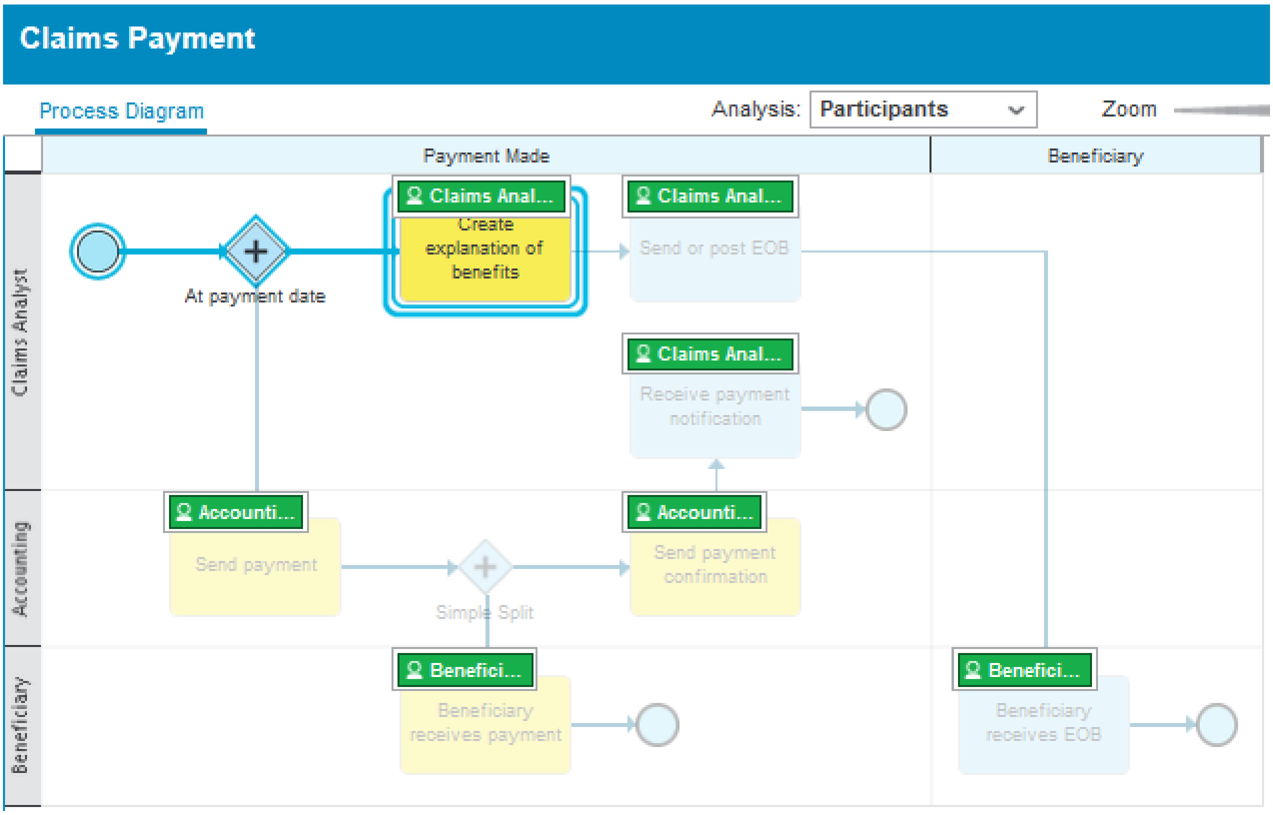
__ 6. Play back path 3.

__ a. Click the **Play** icon.

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

__ c. Click the **Next** icon to move to the **At payment date** gateway.

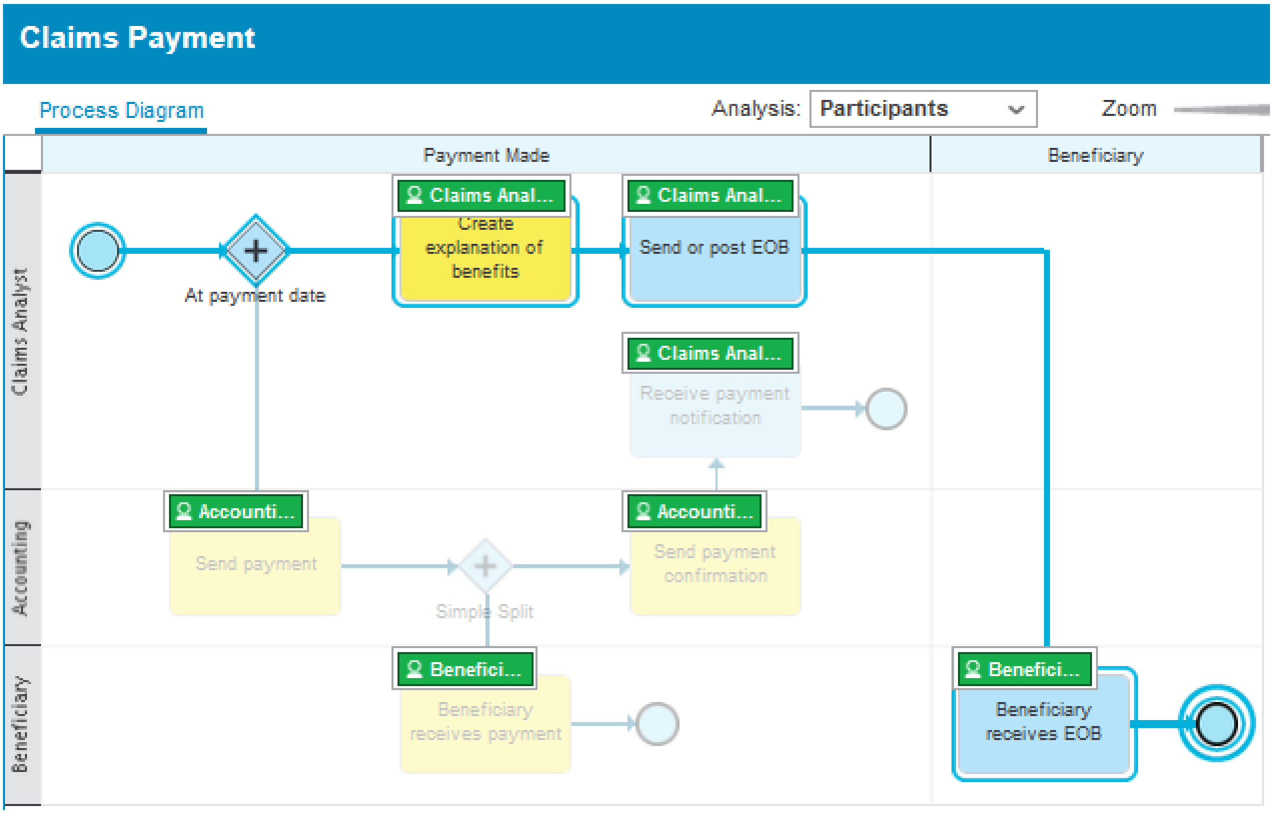
__ d. Click the **Next** icon to move to the **Create explanation of benefits** activity.



__ e. Click the **Next** icon to move to the **Send or post EOB** activity.

__ f. Click the **Next** icon to move to the **Beneficiary receives EOB** activity.

__ g. Click the **Next** icon to move to the **End** event.



__ h. Verify that the playback for path 3 is complete.

End of exercise

Exercise review and wrap-up

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