

Course Exercises Guide

Process Discovery and Modeling in IBM Blueworks Live

Course code ZB031 ERC 3.0



August 2017 edition

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Course Objectives

After completing this course, you should be able to:

- Describe how IBM Blueworks Live fits in process modeling
- Capture process details in an IBM Blueworks Live Discovery Map
- Document process details in IBM Blueworks Live
- Create a Process Diagram from the Discovery Map in IBM Blueworks Live
- Explain a Playback zero session in IBM Blueworks Live

Exercise Description

This course includes the following exercises:

- Creating a IBM Blueworks Live space and blueprint process
- Creating a Discovery Map
- Capturing process details in a Discovery Map
- Creating and modifying a process diagram in IBM Blueworks Live
- Conducting a Playback of the process diagram in IBM Blueworks Live

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 that 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 an IBM Blueworks Live Space and blueprint process

Overview

In this exercise, you create a Space in Blueworks Live and a blueprint process for the Space.

Objectives

After completing this exercise, you should be able to:

- Create an IBM Blueworks Live Space and blueprint process.

Introduction

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

Requirements

This exercise requires an active IBM Blueworks Live account. If an account does not exist for the student, then a 30-day trial account can be provisioned when the student signs up for one.

Estimated time

00:15

Exercise instructions

Preface

- This exercise covers the creation of a space in an IBM Blueworks Live account. The student creates a blueprint process in the space. To accomplish completing this exercise, the student must have an active Blueworks Live account.

Part 1: Sign up for Blueworks Live

- ___ 1. Log on to Blueworks Live.
 - ___ a. Open your web browser, and enter the following URL:
`https://www.blueworkslive.com/signup/trial`
 - ___ b. Follow the instruction on the sign-up screen to create your account.
 - ___ c. After you signed up, note your account email address and password as you need this information to log in.



Information

Try the full version of Blueworks Live for 30 days for free. All Blueworks Live trial accounts include 30 days of free access to all product features. At the end of your trial, you can continue by using the full version or the free, limited version of Blueworks Live. The full version includes advanced features that are not in the free version:

- Simple process automation
 - Unlimited process maps and diagrams
 - Collaboration with multiple users
 - Process publishing
 - Visio import
 - Templates
 - Printing and exporting
 - File attachments
 - Email notifications
 - Integration with IBM Business Process Manager
-

Part 2: 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 in the **Email** field.

___ d. Enter the account password in the **Password** field.

___ e. Click **Log In**.

BlueworksLive

Email

Password

☒ Remember my email

Log In

New to Blueworks Live?
[Learn more](#)

Trouble logging in?
[Find help here](#)

Don't have an account?
[Sign up now](#)

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Latest news...

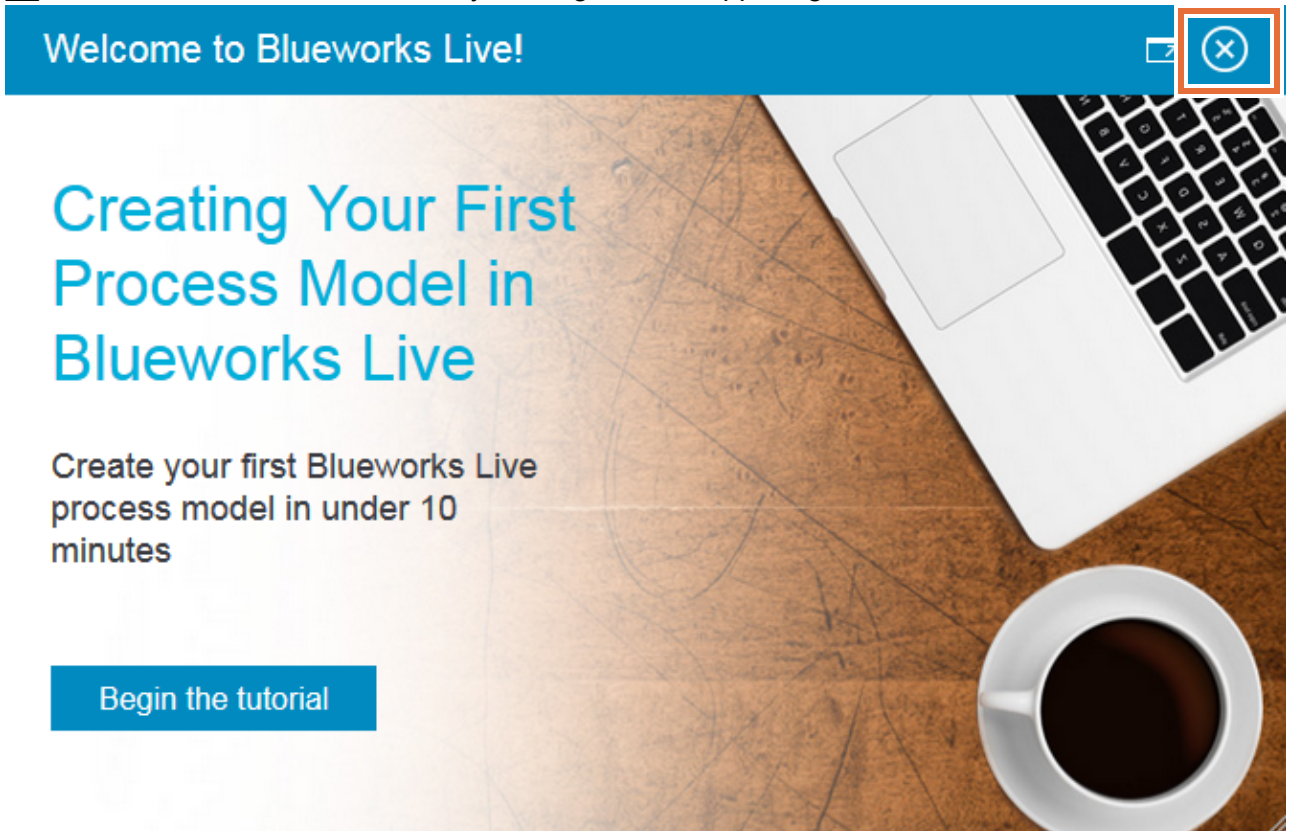
The [December 2015 release](#) is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

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

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

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

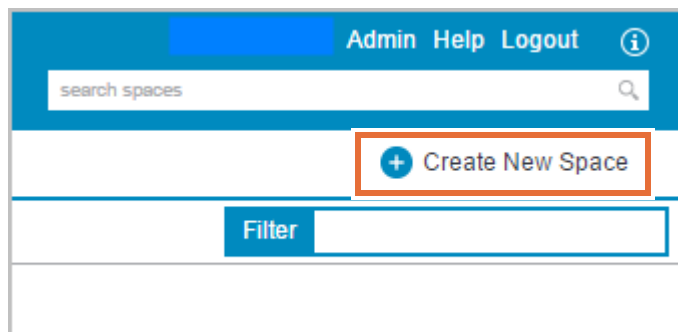
- ___ 2. Close the welcome screen by clicking **X** at the upper-right corner of the welcome screen.



- ___ 3. Create a space in the IBM Blueworks Live account space repository.
- ___ a. Click the **Library** tab at the top of the Blueworks Live home page.
 - ___ b. The **Spaces** tab is already opened on the left side of the row of section tabs.

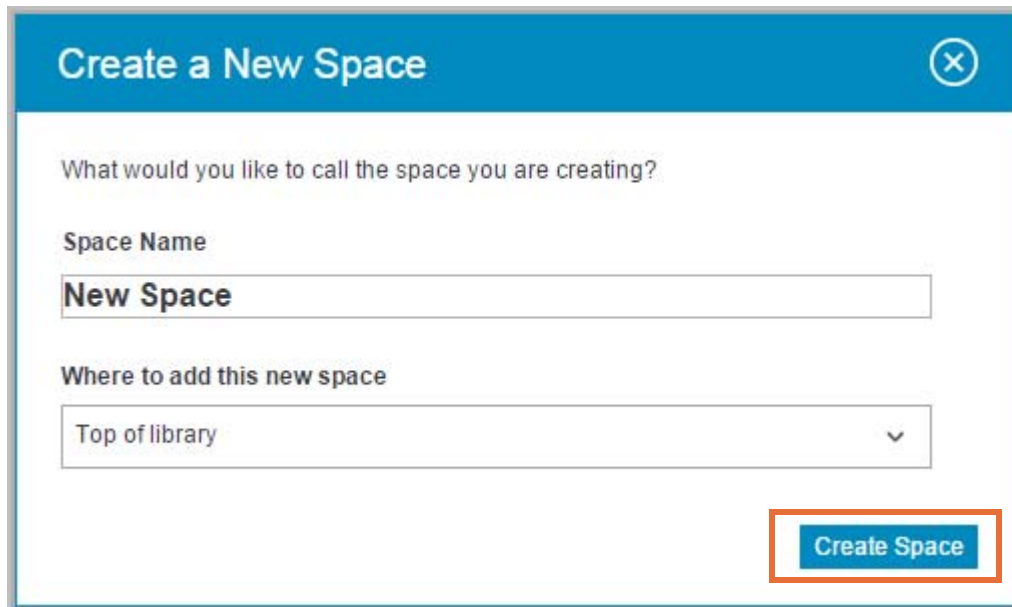


- ___ c. Click + **Create New Space** on the upper-right side of the page.



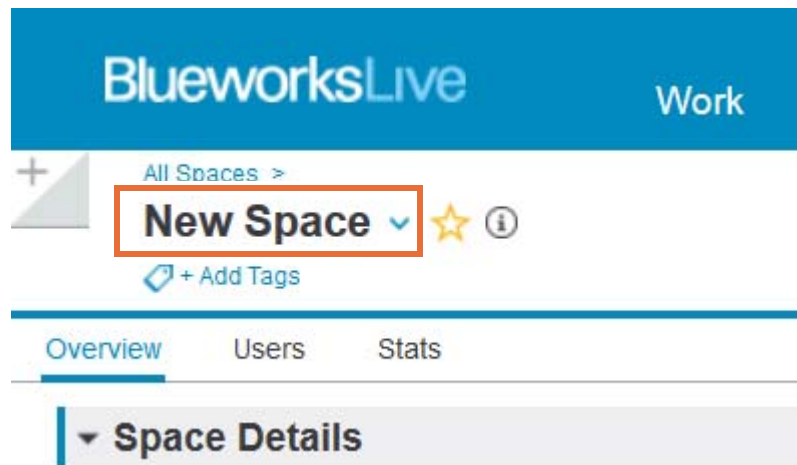
- ___ d. Click the **Space Name** entry in the **Create a New Space** dialog box.
- ___ e. Enter the name of the new space: New Space

- ___ f. Leave the default value for the Where to add this new space entry.
- ___ g. Click **Create Space** to complete the new space creation.

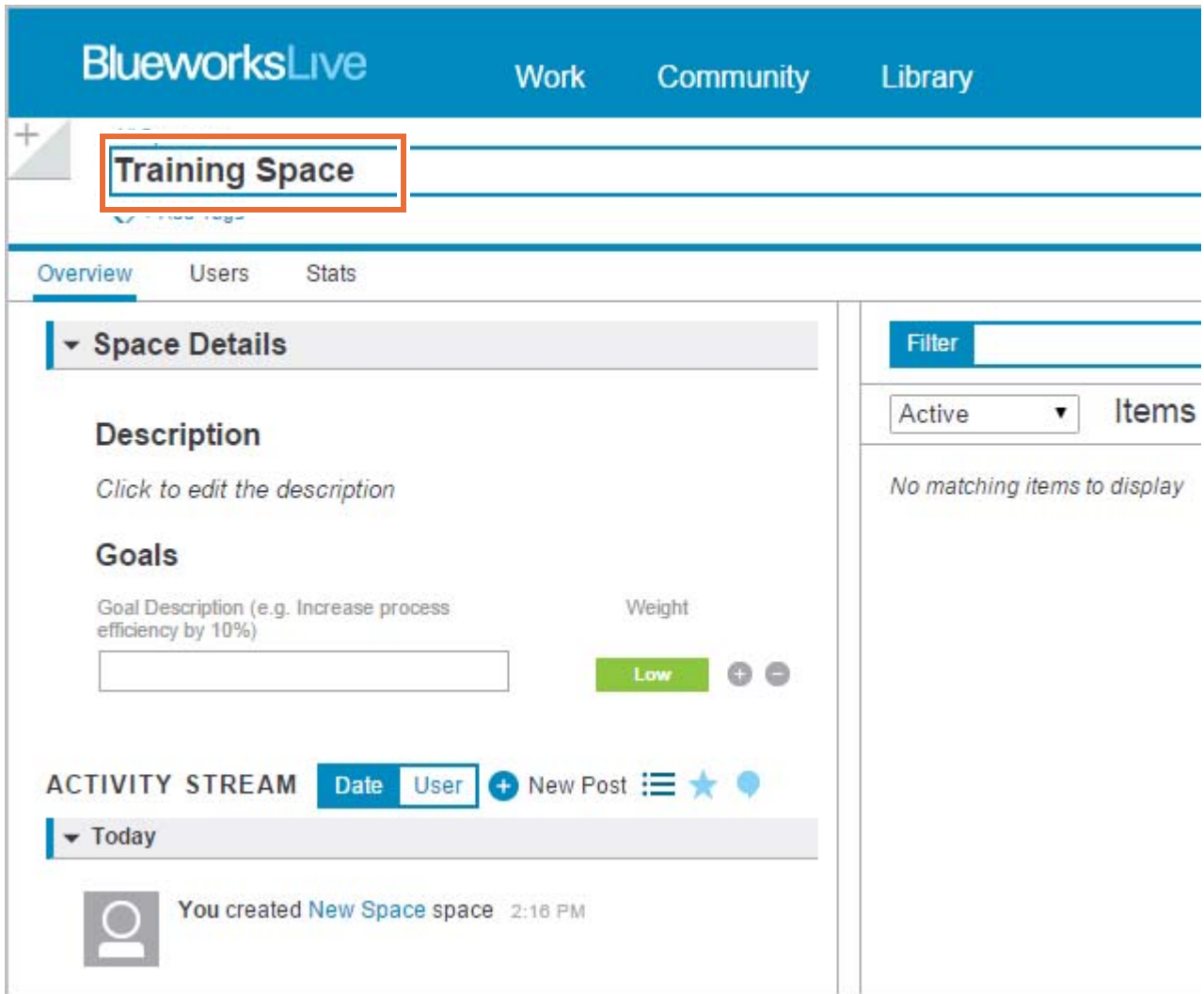


Part 3: Modify the space information

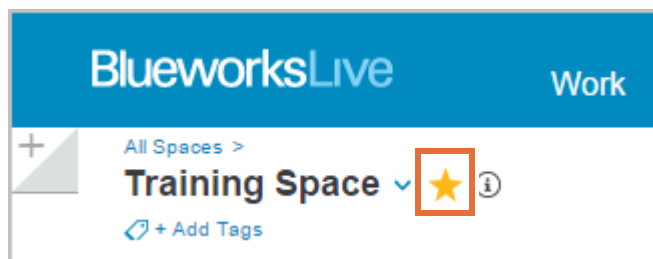
- ___ 1. Change the space name.
 - ___ a. The New Space page is created. Click the name of the space to highlight the area.



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

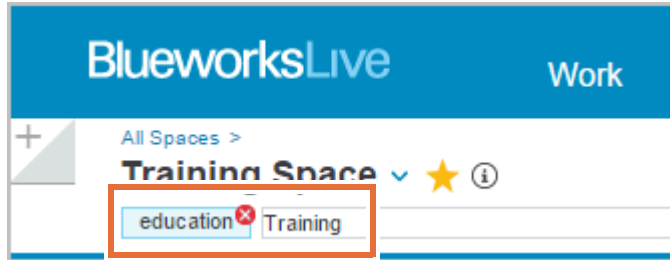


- ___ 2. Make the space a part of the **I'm Following** space repository.
- ___ a. Click the star next to the space name.
- ___ b. Verify that the star changed color to signify the space is now part of the **I'm Following** spaces.



- ___ 3. Add tags to the space.
- ___ a. Click the **Add Tags** below the space name.
- ___ b. Type education followed with a comma.

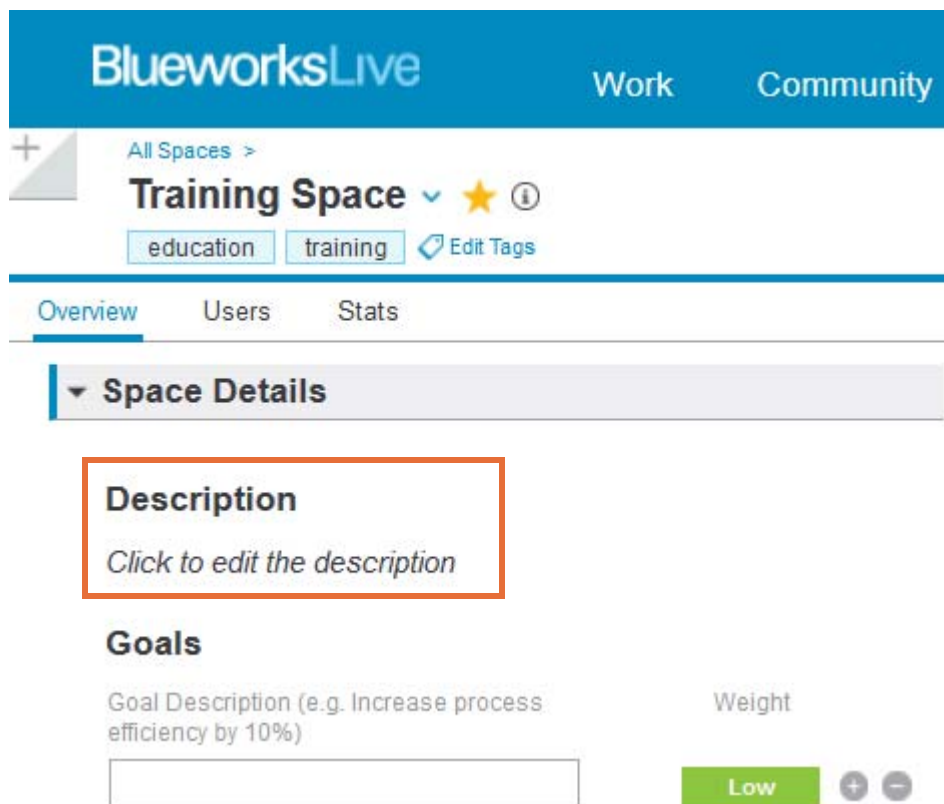
- ___ c. Type **Training** in the next entry box and press Enter to add tags.



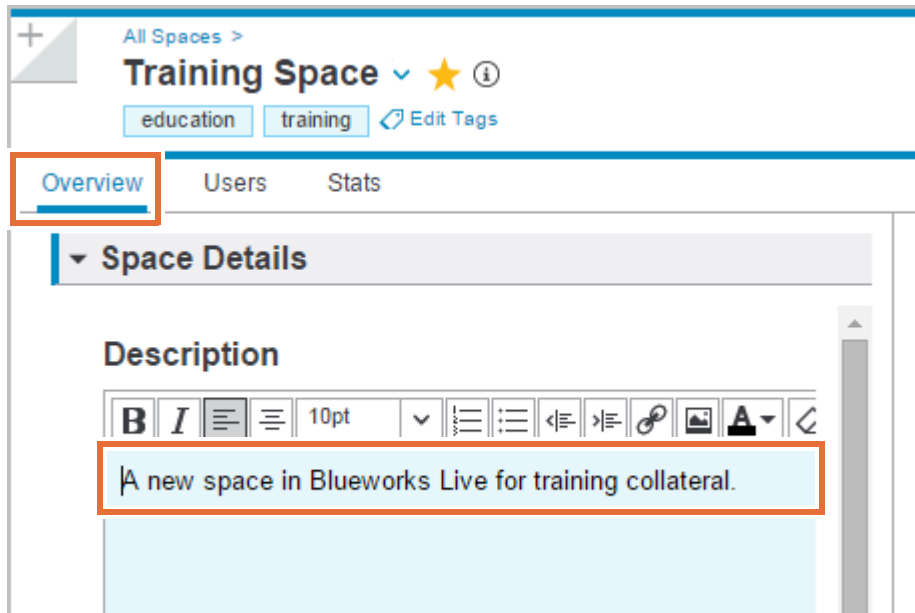
- ___ d. Verify that two tags are present for the space: education and Training.

- ___ 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 **Goal** entry box.
- ___ b. Type the following goal: Learn Blueworks Live process discovery, and press Enter.

- ___ c. Click the **Weight** icon to the right of the entry until it is set to **High**.

BlueworksLive Work Community

+ All Spaces >

Training Space ★ ⓘ

education training Edit Tags

Overview Users Stats

▼ **Space Details**

Description

A new space in Blueworks Live for training collateral.

Goals

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

Learn Blueworks Live administrati

Weight

High + -

- ___ d. Click the **+ plus sign** next to the weight. A new entry box appears.

Goals

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

Learn Blueworks Live administrati

Weight

High + -

- ___ e. In the next entry box, type the next goal: Learn about creating a Blueworks Live process diagram, and press Enter.

- ___ f. Click the **Weight** icon to the right of the entry until it is set to **High**.

Overview Users Stats

▼ Space Details

Description

A new space in Blueworks Live for training collateral.

Goals

Goal Description (e.g. Increase process efficiency by 10%)	Weight
Learn Blueworks Live process discovery	High + -
Learn about creating a Blueworks Live process diagram	High + -

Part 4: Create a blueprint process

- ___ 1. Create a blueprint process.
- ___ a. Click **Create New** on the right side of the space interface.

Export Space

Filter

Create New ▼ + Import

Active ▼ Items (0)

Type	Name	Date	Tag
No matching items to display			

- ___ b. Select **Process Blueprint** from the menu options.

Create New ▼ + Import

- Space
- Process Blueprint
- Process App
- Policy
- Decision

- ___ c. Type the name of the new process in the entry field: Hiring Requisition

- ___ d. Click **Create**.

- ___ 2. Modify the process information.

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

- ___ b. Type hr department in the entry field and press Enter.

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

End of exercise

Exercise review and wrap-up

The first part of the exercise was about creating a space in the IBM Blueworks Live account. The space was selected as a space I'm Following for quicker access. Details such as a description and a set of goals were added to provide more information. Weight was given to each goal added. A blueprint process was created and modified in the space.

Exercise 2. Creating a Discovery Map

Objectives

After completing this exercise, you should be able to:

- Create a Discovery Map in an IBM Blueworks Live blueprint with a process narrative

Overview

In this exercise, you create a Discovery Map in Blueworks Live.

Estimated time

00:30

Overview

In this exercise, the process owner and you are creating the discovery map in the blueprint process that is created in exercise 1. Creating the discovery map is about adding process milestones, or phases, adding activities and modifying the discovery map. Modifying the process discovery map is to refine the map so it reflects the “as is” process model in a comprehensive manner.

Objectives

At the end of this exercise, you should be able to:

- Capture process milestones for a Discovery Map
- Capture process steps and activities for a Discovery Map
- Create a subprocess from Discovery Map activities
- Capture important process details in a Discovery Map

Introduction

Descriptive modeling for the Hiring Requisition process begins with the creation of the discovery map. The discovery map is an evolving task. For this exercise, some of the details of the process are captured and are introduced as the process owners voice to initiate exercise steps.

Requirements

This exercise requires an active IBM Blueworks Live account. If an account does not exist for the student, then a 30-day trial account can be provisioned when the student signs up for one.

Exercise instructions

Preface

- This exercise covers the steps for creating a discovery map during a process review session with the process owner. To accomplish completing this exercise, the student must have an active Blueworks Live account.

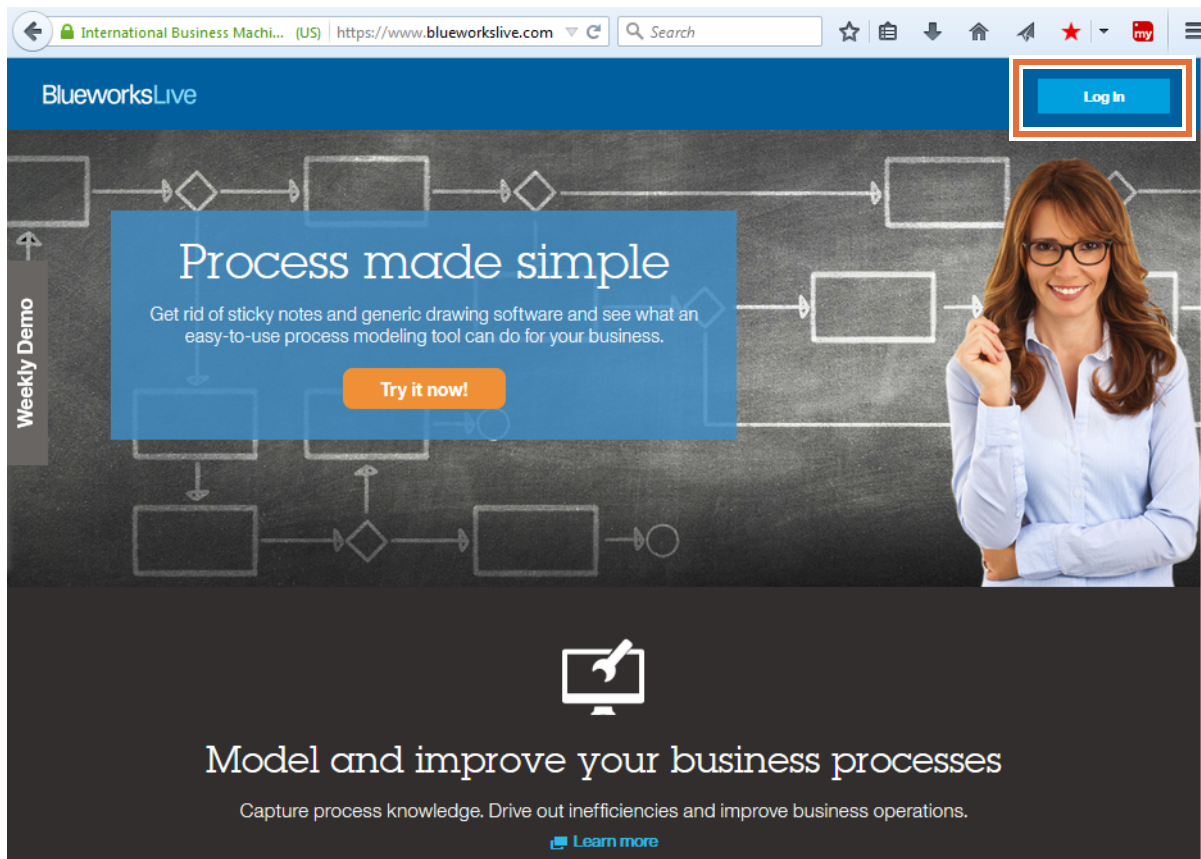
Part 1: Add milestones to the discovery map



Note

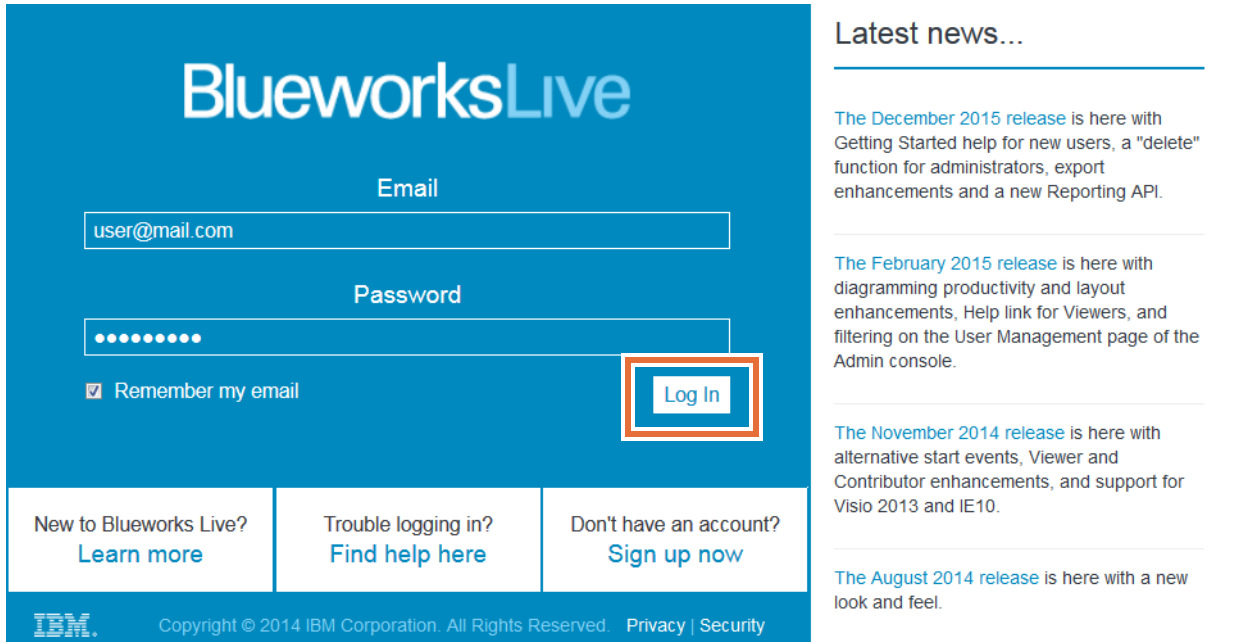
If you are already in Blueworks Live, skip step 1 and 2 and proceed immediately to step 3 in this section.

- ___ 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 your account email address in the **Email** field.
- ___ d. Enter your account password in the **Password** field.

___ e. Click **Log In**.



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

BlueworksLive

Email

user@mail.com

Password

.....

☒ Remember my email

Log In

New to Blueworks Live?
Learn more

Trouble logging in?
Find help here

Don't have an account?
Sign up now

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Latest news...

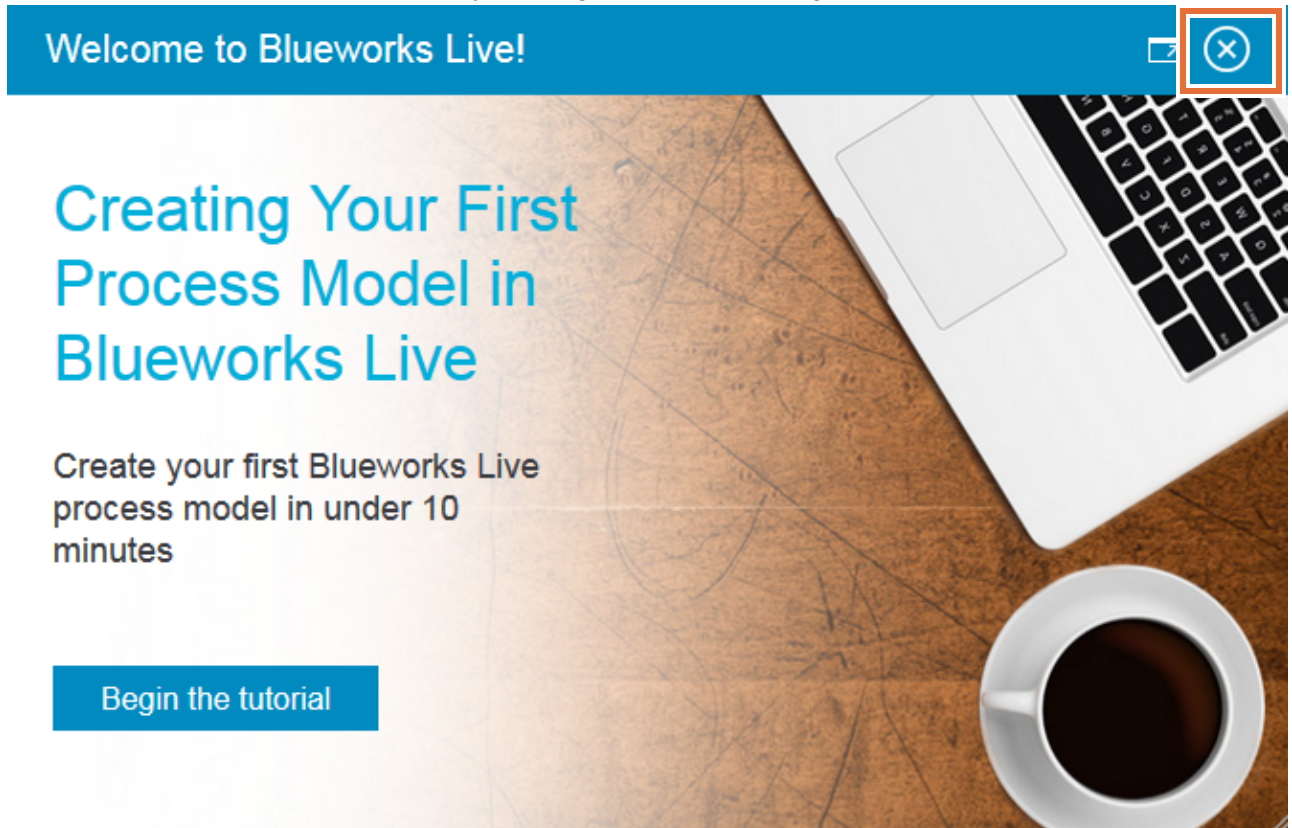
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The February 2015 release is here with diagramming productivity and layout enhancements, Help link for Viewers, and filtering on the User Management page of the Admin console.

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

The August 2014 release is here with a new look and feel.

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



- ___ 3. Access the blueprint process.
- ___ a. Click the **Library** tab and click the **Processes** link.



- ___ b. Click the Hiring Requisition link.

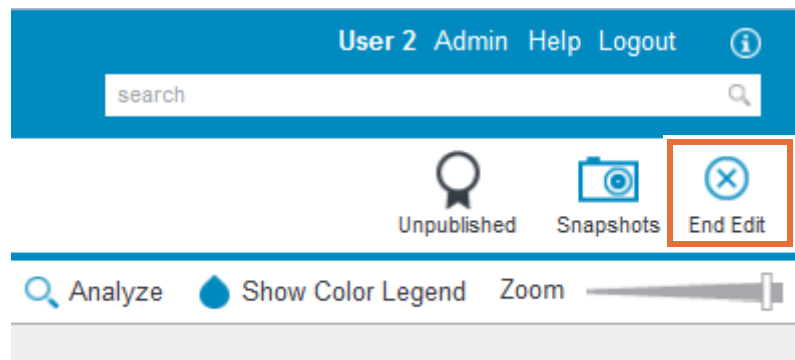


- ___ c. Verify that the Hiring Requisition blueprint process discovery map is now available and in the Edit mode.



Note

If the last icon on the right is labeled **End Edit**, then the discovery map is in the Edit mode.

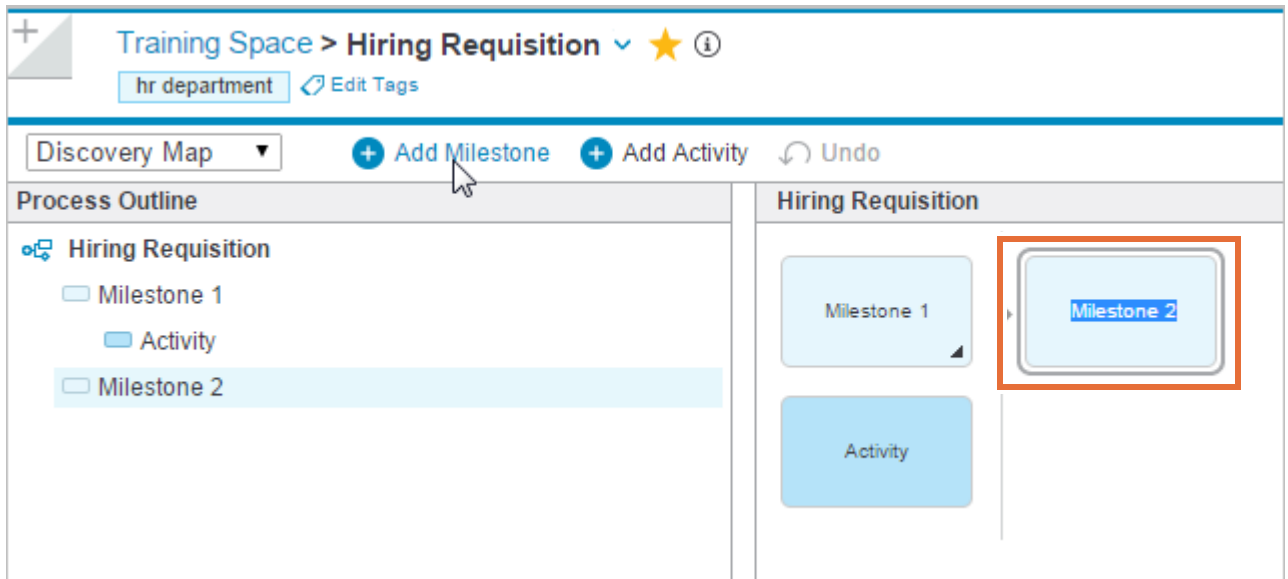


Information

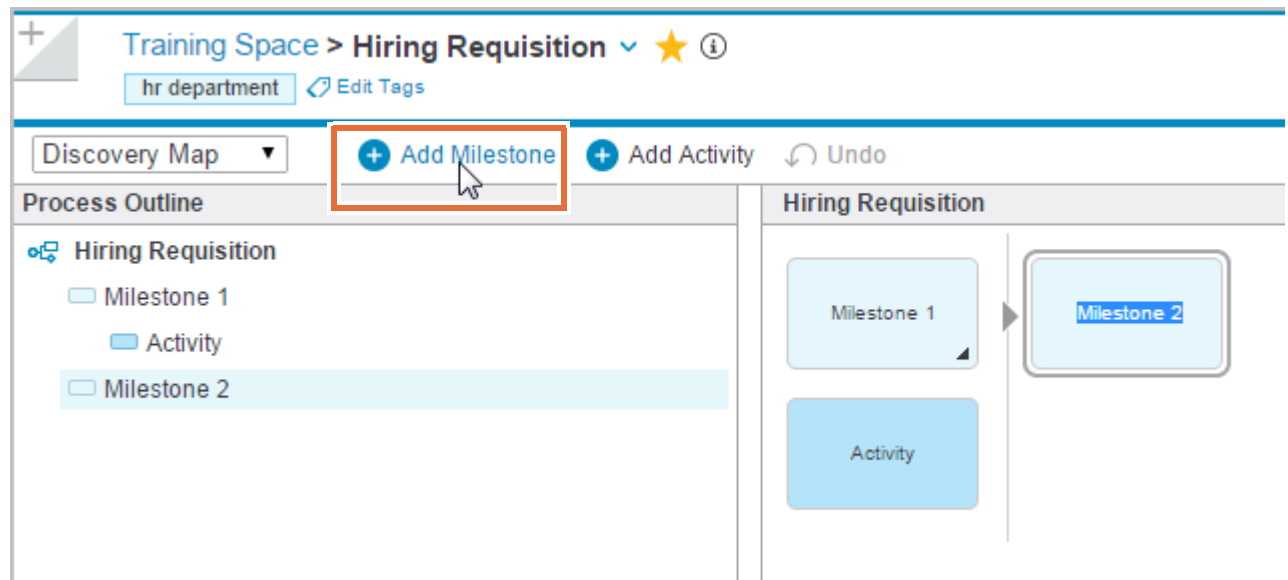
Process owner:

“The company is experiencing accelerated growth. The company needs to hire many people in a short amount of time. The initial process that is used to hire people is called the Hiring Requisition process. This process covers a new job position through *submission*, *approval*, and *completion* phases so new hire candidates can apply for the job position.

- ___ 4. Insert milestones to the discovery map.
- ___ a. Click the **Milestone 2** icon to highlight it on the discovery map.



- ___ b. Click **Add Milestone** to add one more milestone to the discovery map.

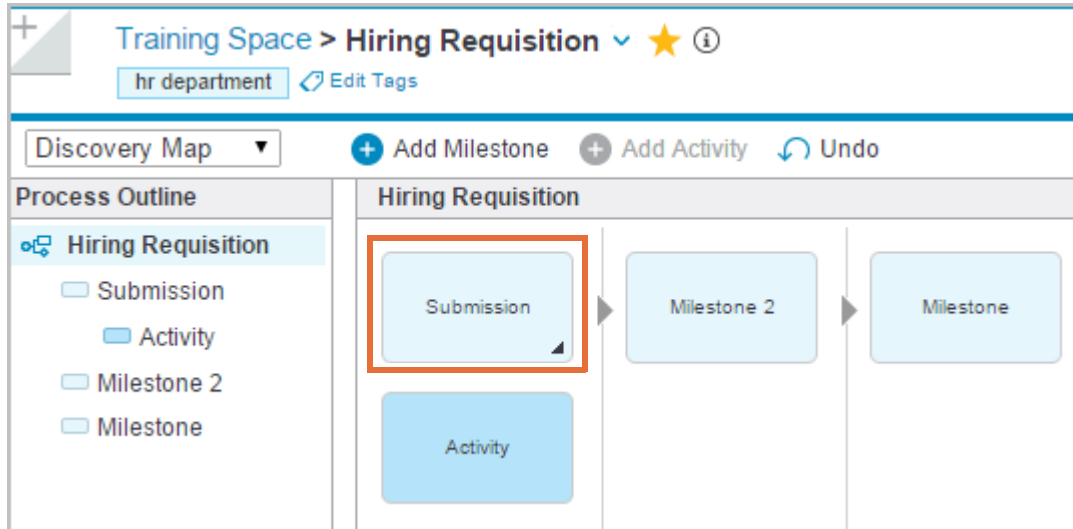


Note

A milestone can be added anywhere in the discovery map. Click, hold, and drag the milestone to move it. 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.

- ___ 5. Rename the milestones.
- ___ a. Click the **Milestone 1** icon label to highlight it in blue.

- ___ b. Type the new label for the milestone: Submission



Note

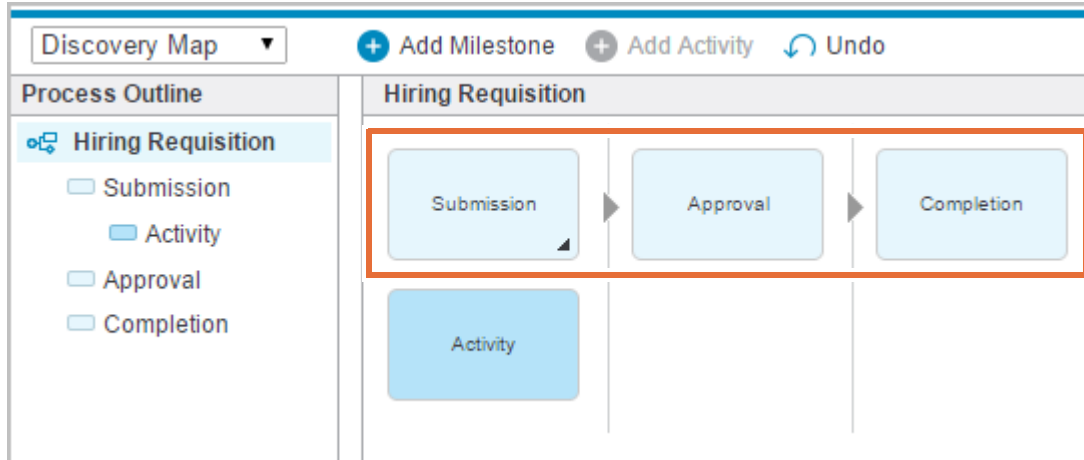
The next steps are renaming the milestones through the **Process Outline**. Either method is appropriate to renaming the milestone in the discovery map.

- ___ c. Click the **Milestone 2** label in the **Process Outline** and drag the beam cursor to the end of the label to highlight the text in blue.



- ___ d. Type in the new milestone label: Approval
- ___ e. Click the next milestone label in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ f. Type in the new milestone label: Completion

This section completes adding and labeling the milestones in the discovery map.



Part 2: Add all activities to the discovery map

- ___ 1. Add the Submission milestone activities.



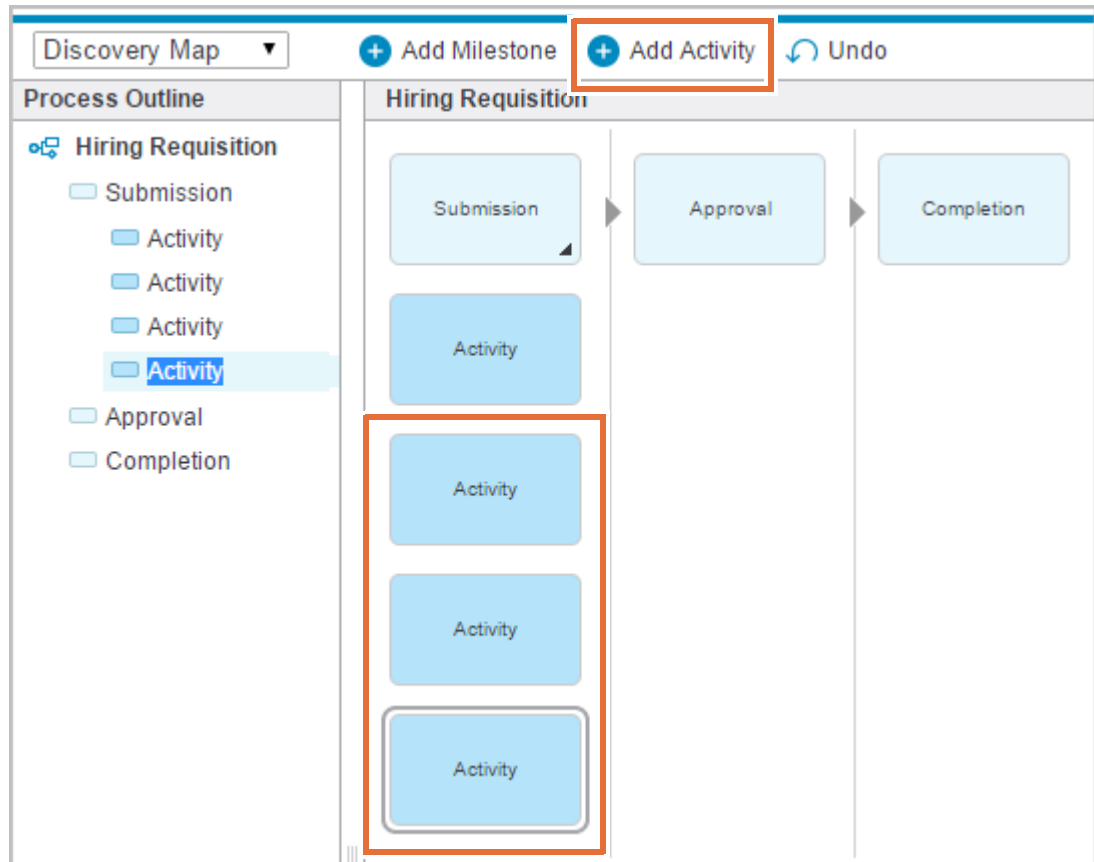
Information

Process owner:

“During the submission phase of the Hiring Requisition process, a hiring manager submits a hiring request. From the submitted request, the system database evaluates the request to identify what type of position is being requested. This request is either a new position or to backfill an existing position within a group in the organization.”

- ___ a. Click the **Activity** icon under the Submission milestone in the discovery map to highlight it.

- ___ b. Click **Add Activity** three times to add four activities in the Submission milestone.



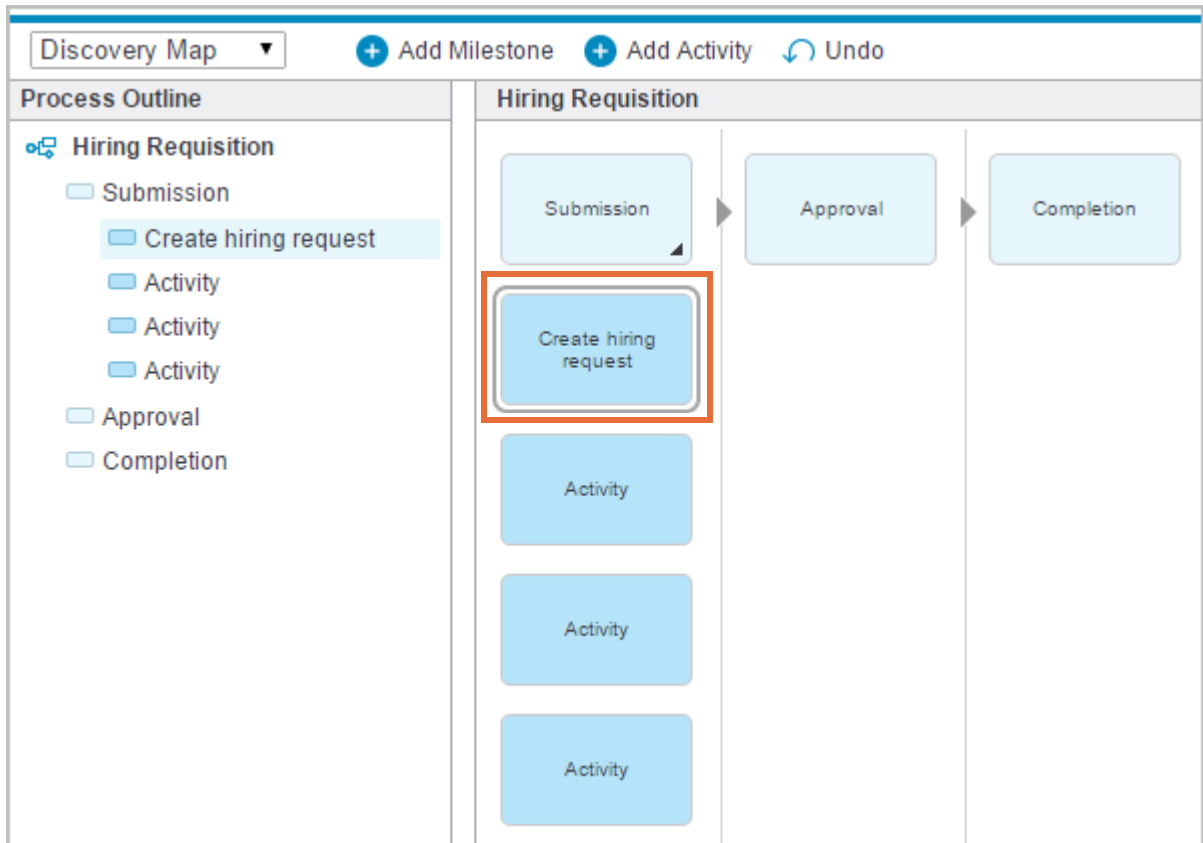
- ___ c. Click the first activity label in the discovery map to highlight the label in blue.



Note

The effort in descriptive modeling is to capture the process facts “as is”. There is no need to try to evaluate process improvement changes.

___ d. Type the new label for the first activity: Create hiring request



___ e. Click the label for the next activity in the discovery map to highlight the label in blue.

___ f. Type in the new label: Submit the hiring request

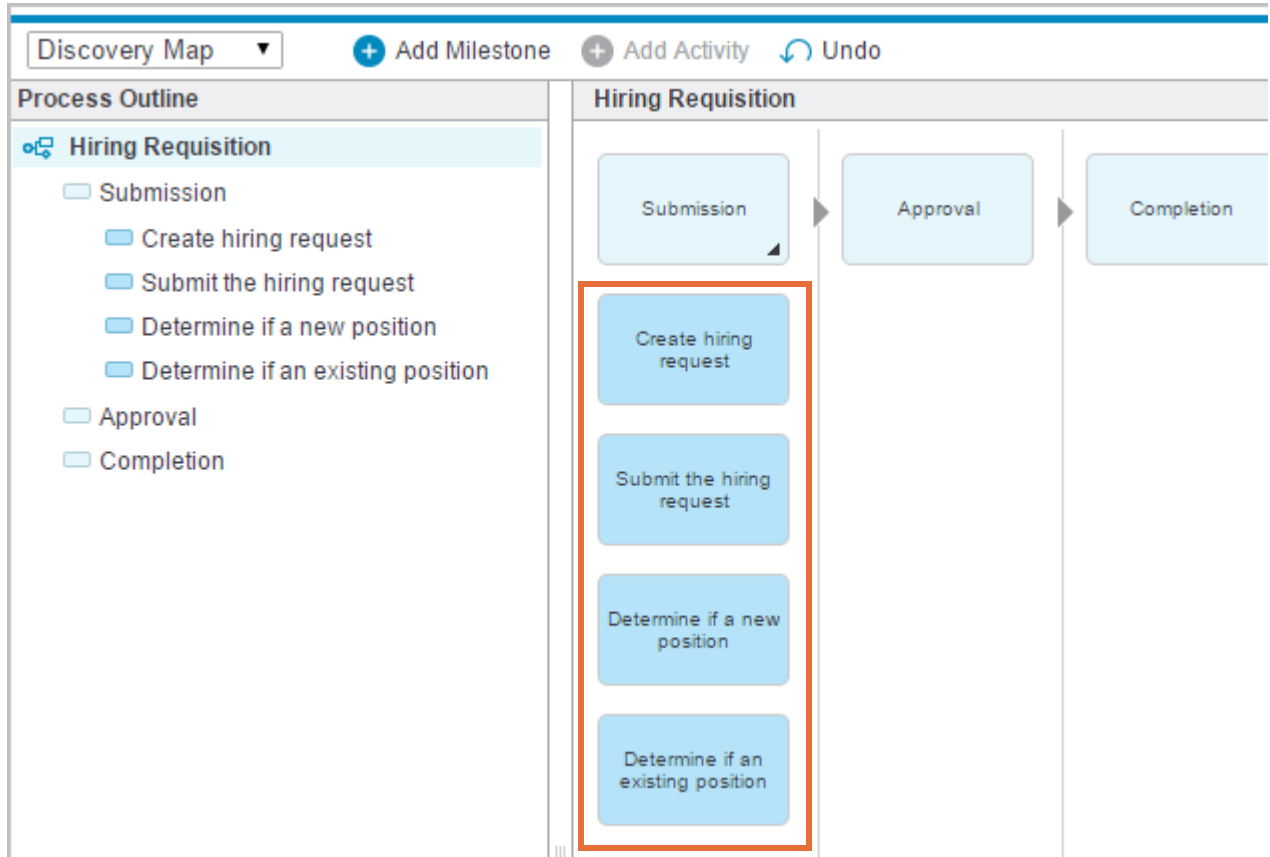
___ g. Click the label for the next activity in the discovery map to highlight the label in blue.

___ h. Type in the new label: Determine if a new position

___ i. Click the label for the next activity in the discovery map to highlight the label in blue.

___ j. Type in the new label: Determine if an existing position

This section completes adding activities in the Submission milestone.



__ 2. Add activities to the Approval milestone.



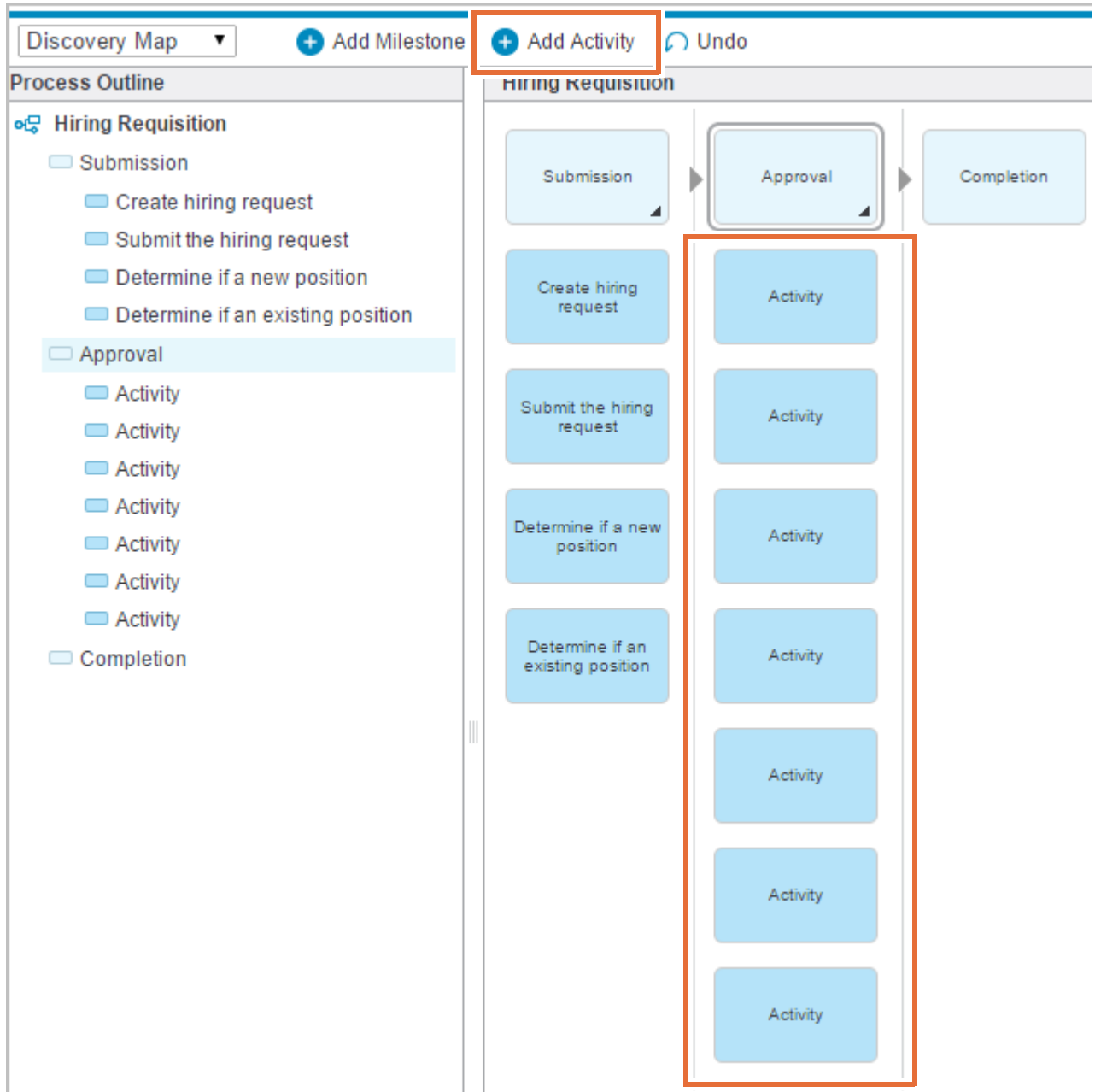
Information

Process owner:

“During the approval phase of the Hiring Requisition process, a general manager reviews only the new position requests. If the new position request is approved or disapproved, the system database notifies the hiring manager of the decision. All new positions and existing position request that are approved go to the system database for salary compliance. Salary requests that are out of compliance are sent to the HR administrator for an override or route back to the hiring manager for a resubmission or request cancellation.”

__ a. Click the **Approval** milestone to highlight the milestone in the discovery map.

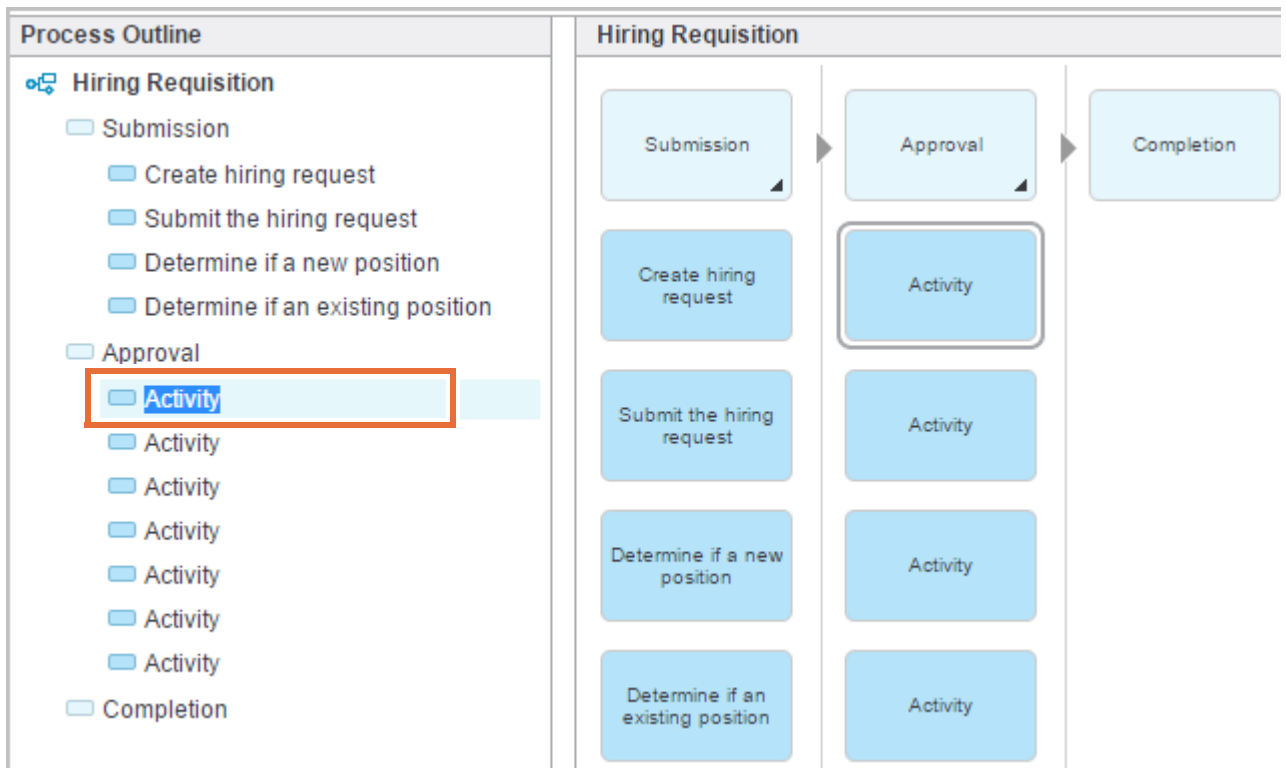
- ___ b. Click **Add Activity** seven times to add seven activities under the milestone.



Note

To complete labeling the Approval milestone activities, you can use the **Process Outline**. You can label the activities either in **Process Outline** or in the activity box in the discovery map.

- ___ c. Click the first activity label under the **Approval** milestone in the **Process Outline** and drag the beam cursor to the end of the label text.



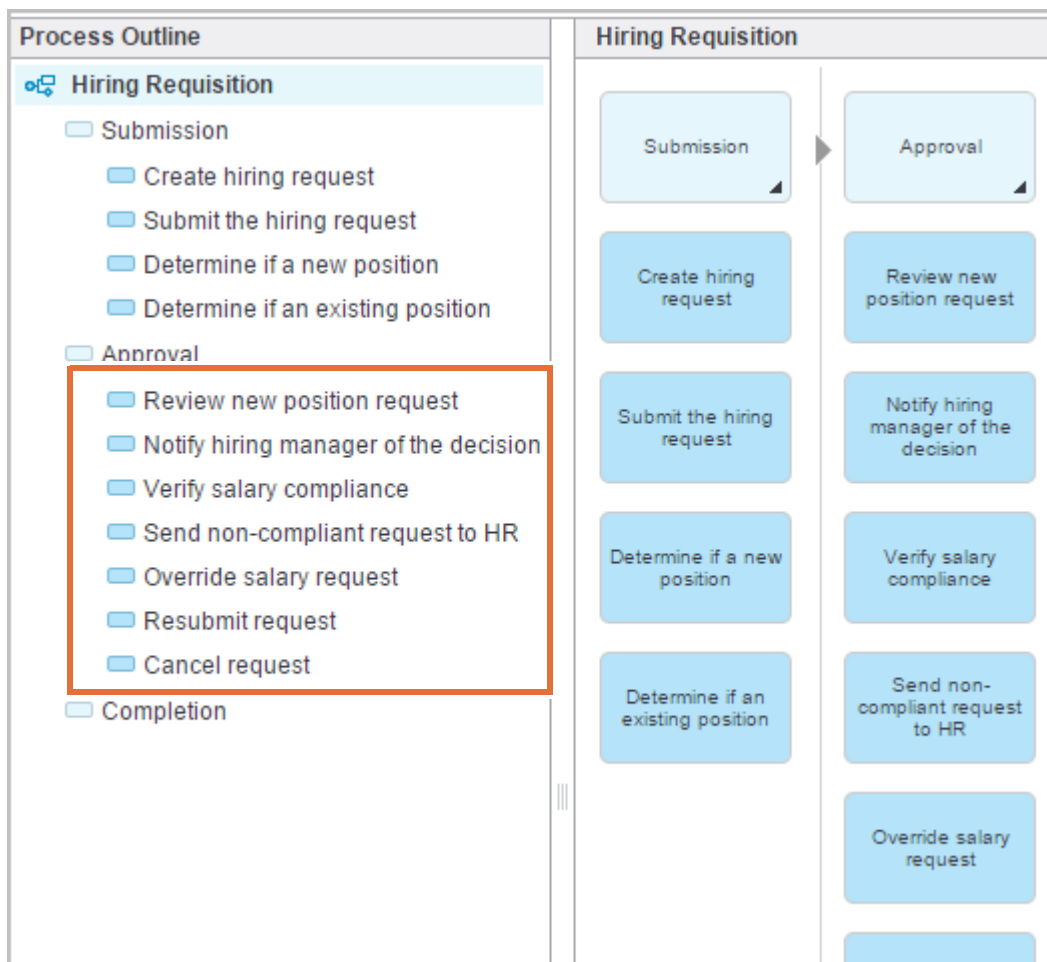
- ___ d. Type in the new label: Review new position request



- ___ e. Click the next activity label under the **Approval** milestone in the **Process Outline** and drag the beam cursor to the end of the label text.

- ___ f. Type in the new label: Notify hiring manager of the decision
- ___ g. Click the next activity label under the Approval milestone in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ h. Type in the next activity label: Verify salary compliance
- ___ i. Click the next activity label under the Approval milestone in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ j. Type in the next activity label: Send non-compliant request to HR
- ___ k. Click the next activity label under the Approval milestone in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ l. Type in the next activity label: Override salary request
- ___ m. Click the next activity label under the Approval milestone in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ n. Type in the next activity label: Resubmit request
- ___ o. Click the next activity label under the Approval milestone in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ p. Type in the next activity label: Cancel request

This section completes adding the activities to the Approval milestone in the process.



- ___ 3. Add activities to the **Completion** milestone.

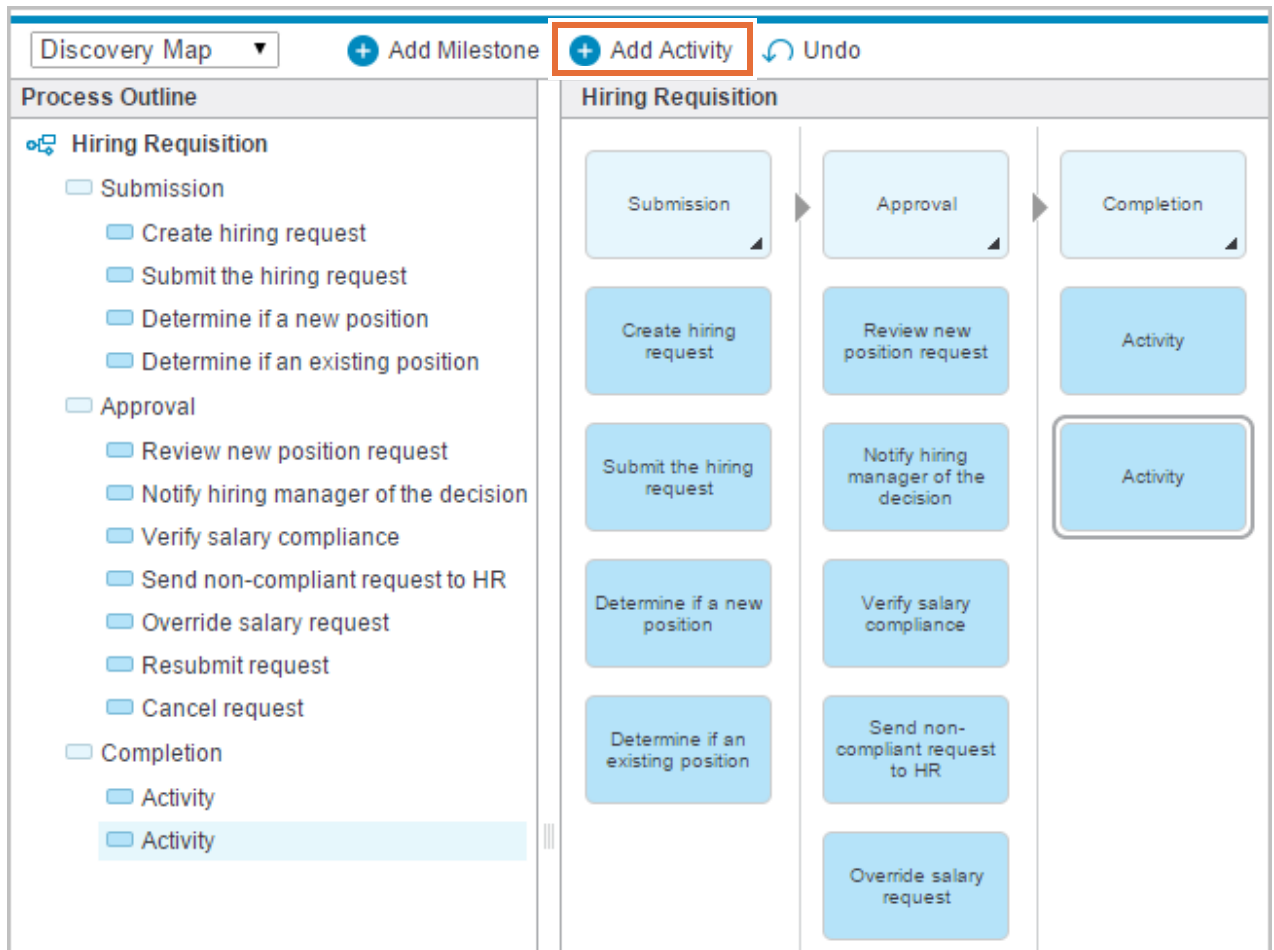


Information

Process owner:

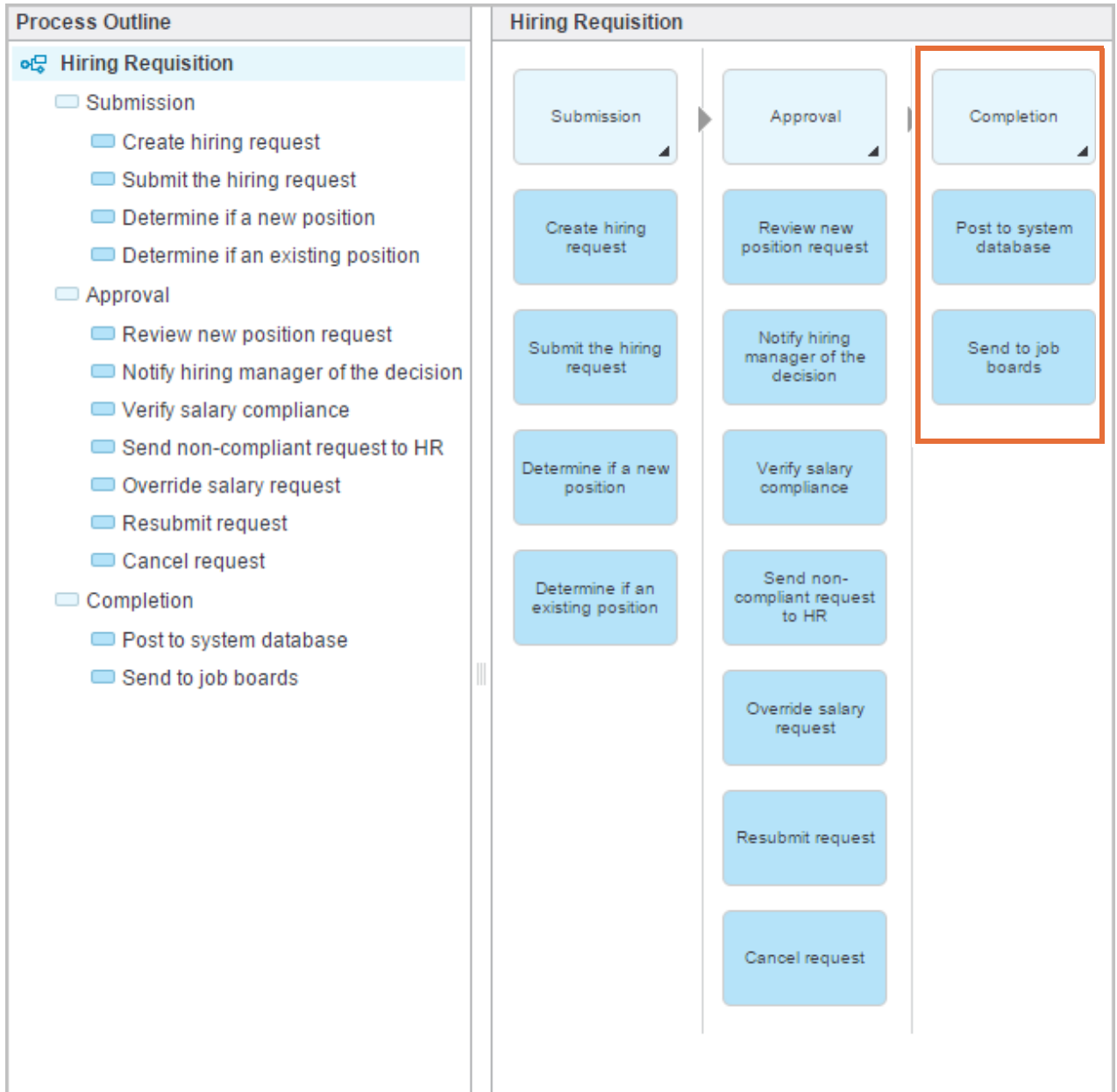
“To complete the Hiring Requisition process, the HR department post the new hire position in the system database. The new hire position is circulated to all the online job search engines and the internal career openings.”

- ___ a. Click the **Completion** milestone in the discovery map.
- ___ b. Click **Add Activity** twice to add two activities under the Completion milestone.



- ___ c. Click the first activity icon label to highlight the label in blue.
- ___ d. Type in the new label: Post to system database
- ___ e. Click the second activity icon label to highlight the label in blue.
- ___ f. Type in the new label: Send to job boards

This section completes adding activities to the Completion milestone.



Part 3: Refine the activities in the discovery map



Information

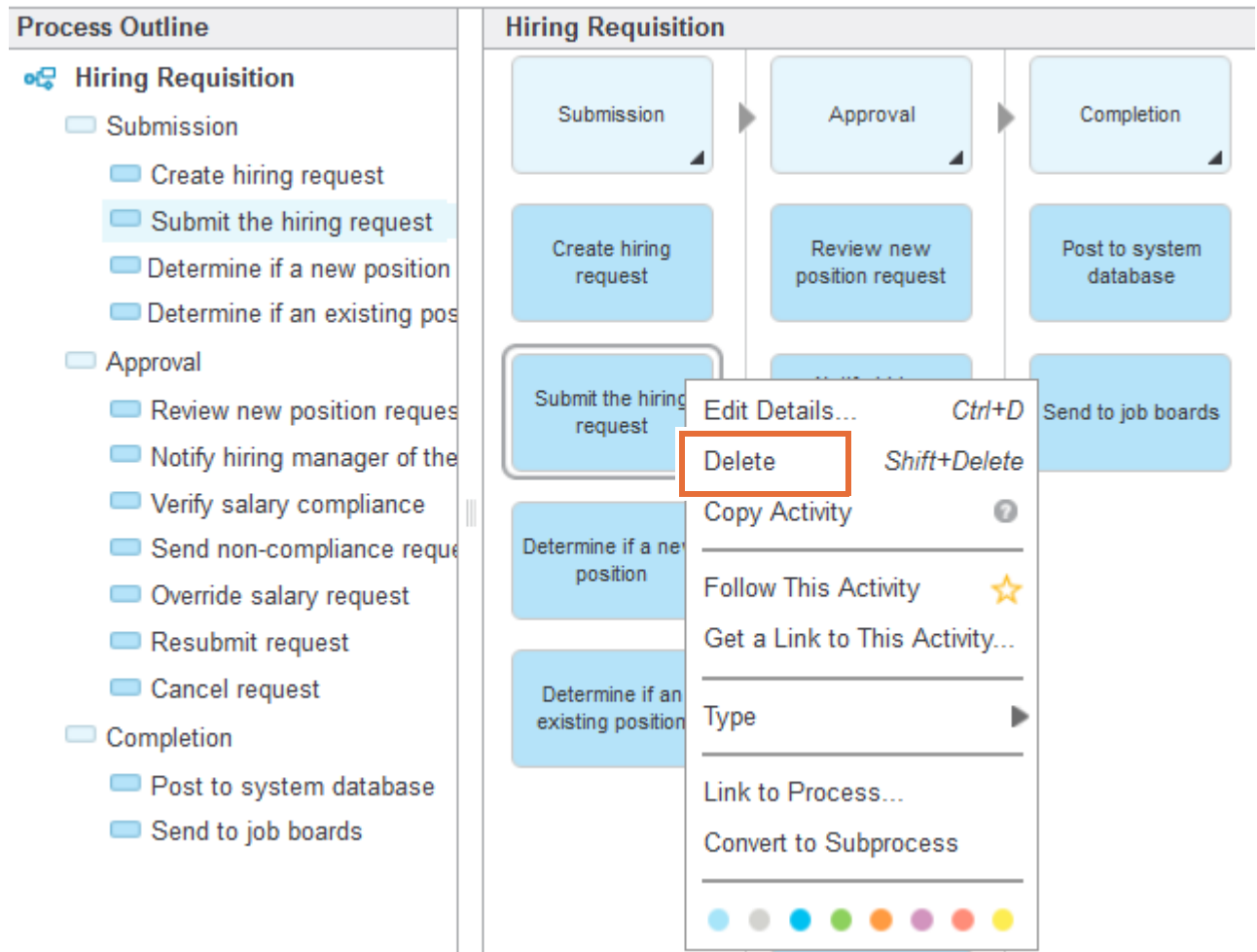
Process Owner:

"The discovery map is good. It reflects all the steps in the process."

Process model author:

“Refine this discovery map to make sure that it shows atomic units of work for each milestone. It can get confusing to present a discovery map and then create an “as is” process diagram from the map if an author does not refine the activities.”

1. Refine the activities in the **Submission** milestone.
 - a. The hiring manager completes the initial two tasks in the milestone. Both activities can be combined into one atomic unit of work in the discovery map. To begin, right-click the second activity, **Submit the hiring request**, in the map, and click **Delete**.



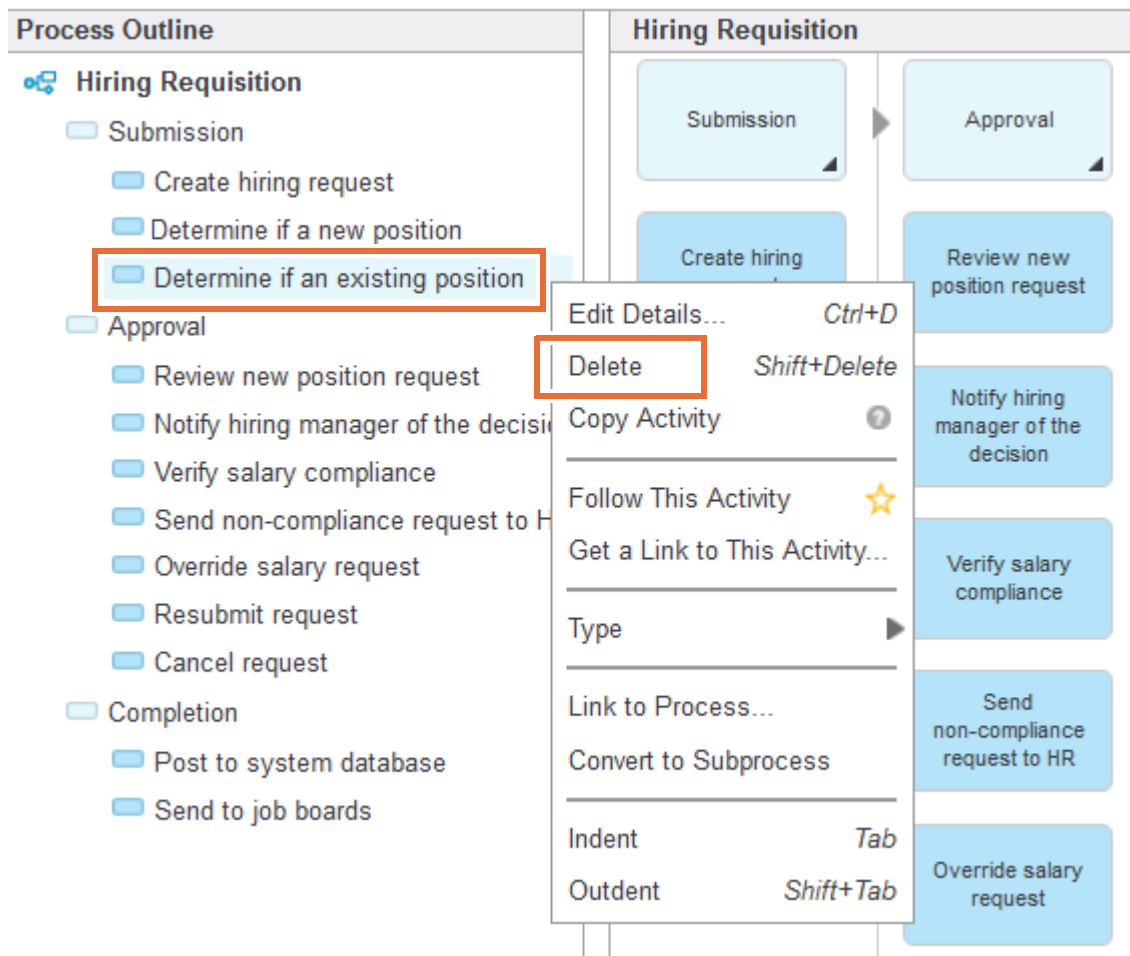
This section completes the first edit to the **Submission** milestone activities. The hiring manager completes the first activity to begin the process.



Note

The process owner or author has concern about losing the information that is deleted from the discovery map. They can add a text description to the details of the first activity to include the information that was deleted. This text entry can be in the form of a process narrative that includes the process owner steps. Adding details is covered in the next exercise.

- ___ b. Right-click the **Determine if an existing position** activity icon in the **Process Outline**, and click **Delete**.



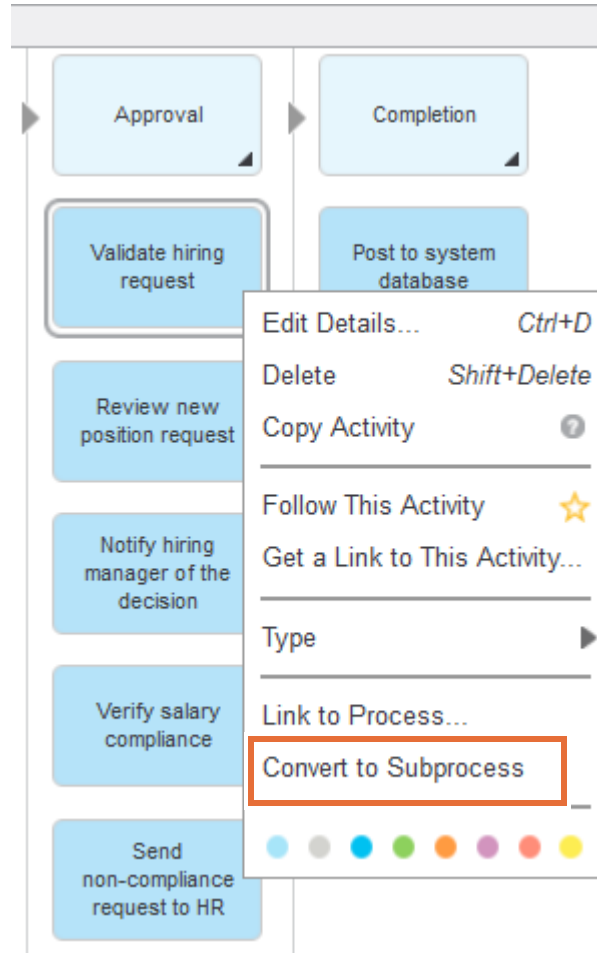
- ___ c. The system database completes the next tasks. Both tasks can be collapsed into one atomic unit of work. Click the label to the **Determine if a new position** activity to highlight the label in blue.
- ___ d. Rename the activity: Determine position type

This section completes the refinement of the activities in the Submission milestone. One process participant completes two distinct tasks. Adding process participant details to the activities is covered in the next exercise.

___ 2. Refine the activities in the Approval milestone

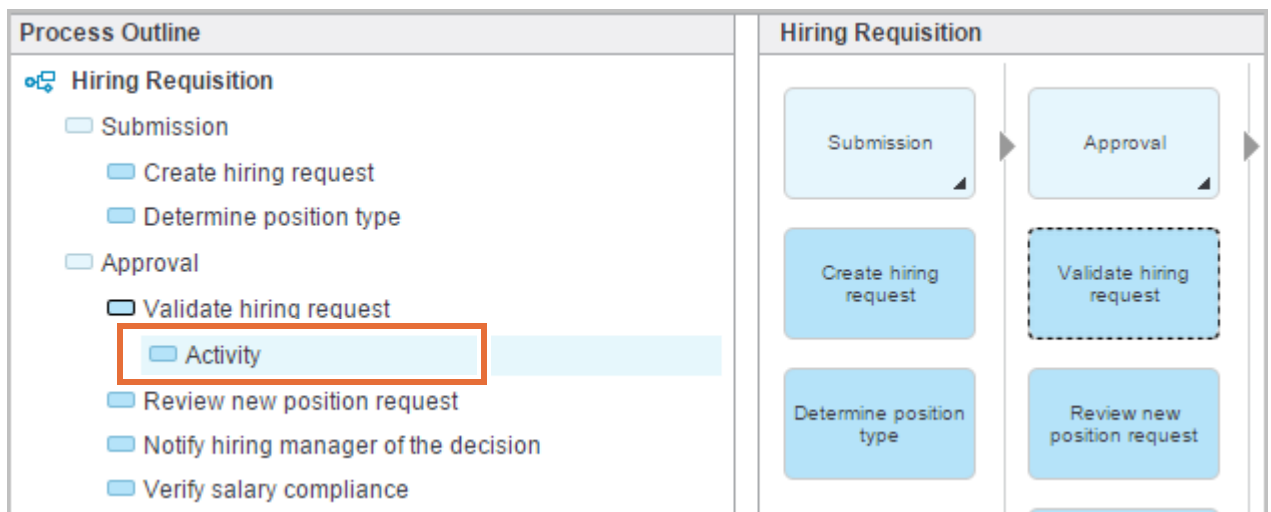
- ___ a. Because of the variety process participants that handle various steps and tasks in the Approval milestone, the process author chooses to add a subprocess activity to the milestone. Click the **Approval** milestone to highlight it.
- ___ b. Click **Add Activity** to add an activity before all the other activities.
- ___ c. Click the label of the new activity to highlight it in blue.
- ___ d. Type the new label: Validate hiring request

- ___ e. Right-click the **Validate hiring request** activity and click **Convert to subprocess**.

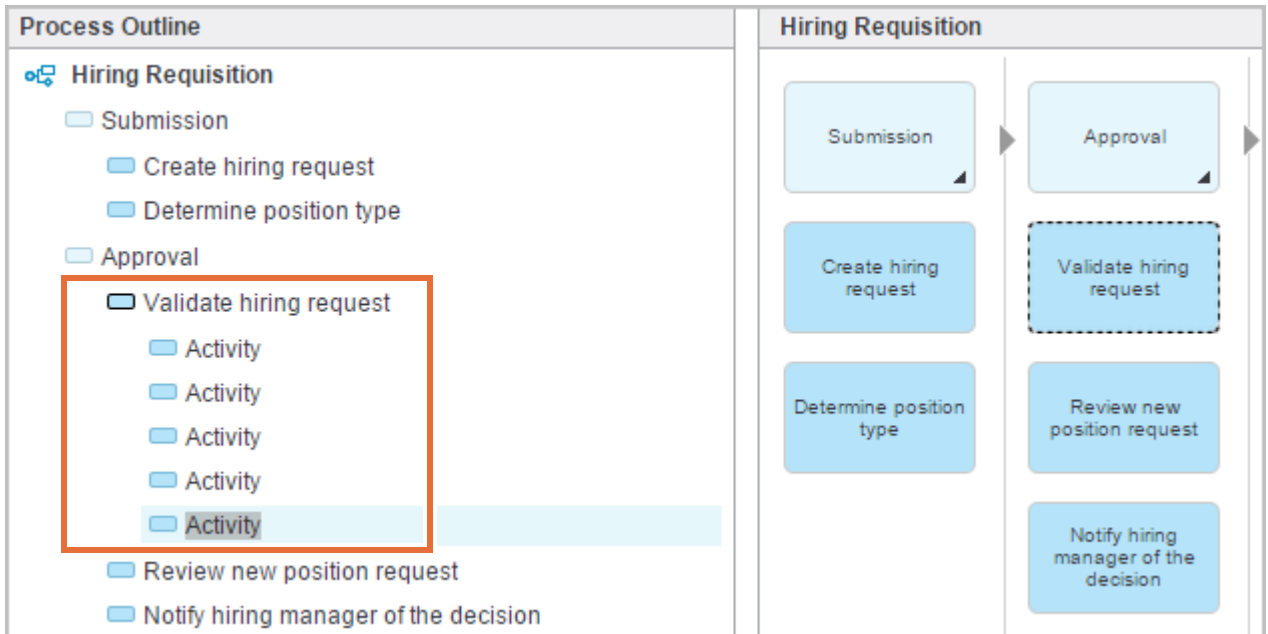


The border of the activity is now a dashed line boundary.

- ___ f. Click the new activity in the subprocess in the **Process Outline**.



- ___ g. Click **Add Activity** four times to add four new activities in the **Validate hiring request** subprocess. Five activities are now present in the subprocess.



- ___ h. Click the first activity label under the **Validate hiring request** subprocess in the **Process Outline** and drag the beam cursor to the end of the label text.

- ___ i. Type in the new label: Review new position



- ___ j. Click the next activity label under the Validate hiring request subprocess in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ k. Type in the new label: Notify hiring manager
- ___ l. Click the next activity label under the Validate hiring request subprocess in the **Process Outline** and drag the beam cursor to the end of the label text.
- ___ m. Type in the new label: Review for salary compliance

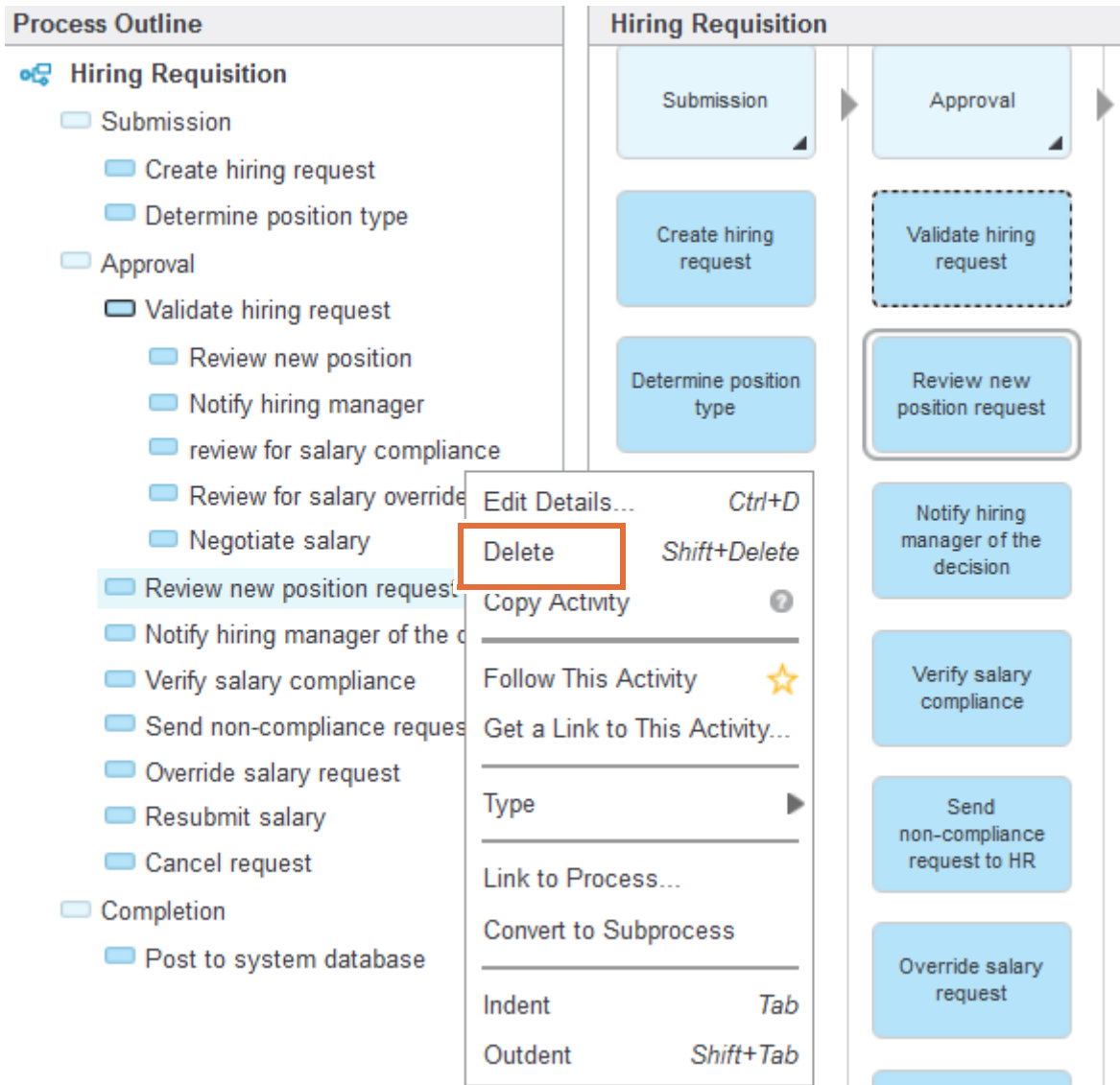
- ___ n. Click the next activity label under the Validate hiring request subprocess in the **Process Outline** and drag the beam cursor to the end of the label text.
 - ___ o. Type in the new label: Review for salary override
 - ___ p. Click the next activity label under the Validate hiring request subprocess in the **Process Outline** and drag the beam cursor to the end of the label text.
 - ___ q. Type in the new label: Negotiate salary
-

**Note**

This section completes adding new activities in the subprocess. Another method that is used to accomplish the same thing is to click and drag the former Approval milestone activities and place them beneath the Validate hiring request subprocess in the **Process Outline**. Then, relabel each of the former activity to the new subprocess activity label.

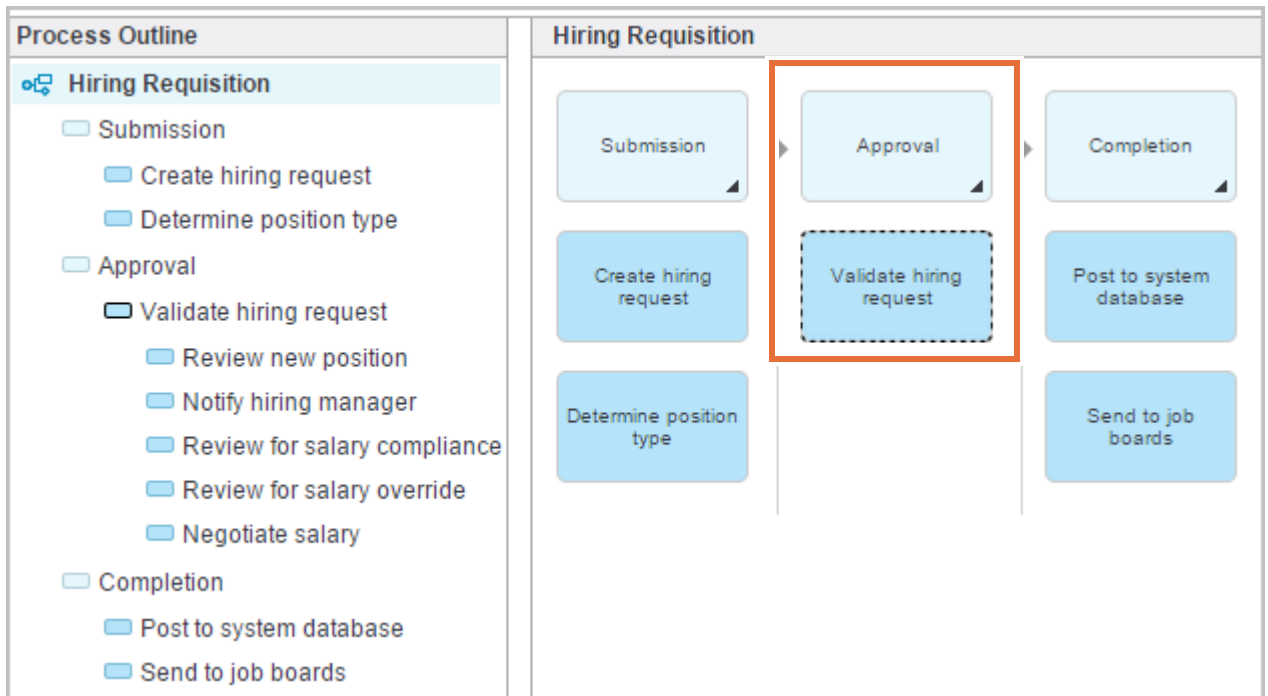
___ 3. Delete the activities in the Approval milestone.

- ___ a. Delete the former Approval milestone activities, or process steps. Right-click the first activity, **Review new position request** after the subprocess activity, and click **Delete**.



- ___ b. Right-click the next activity, **Notify hiring manager of the decision** after the subprocess activity and click **Delete**.
- ___ c. Right-click the next activity, **Verify salary compliance** after the subprocess activity and click **Delete**.
- ___ d. Right-click the next activity, **Send non-compliant request to HR** after the subprocess activity and click **Delete**.
- ___ e. Right-click the next activity, **Override salary request** after the subprocess activity and click **Delete**.
- ___ f. Right-click the next activity, **Resubmit request** after the subprocess activity and click **Delete**.

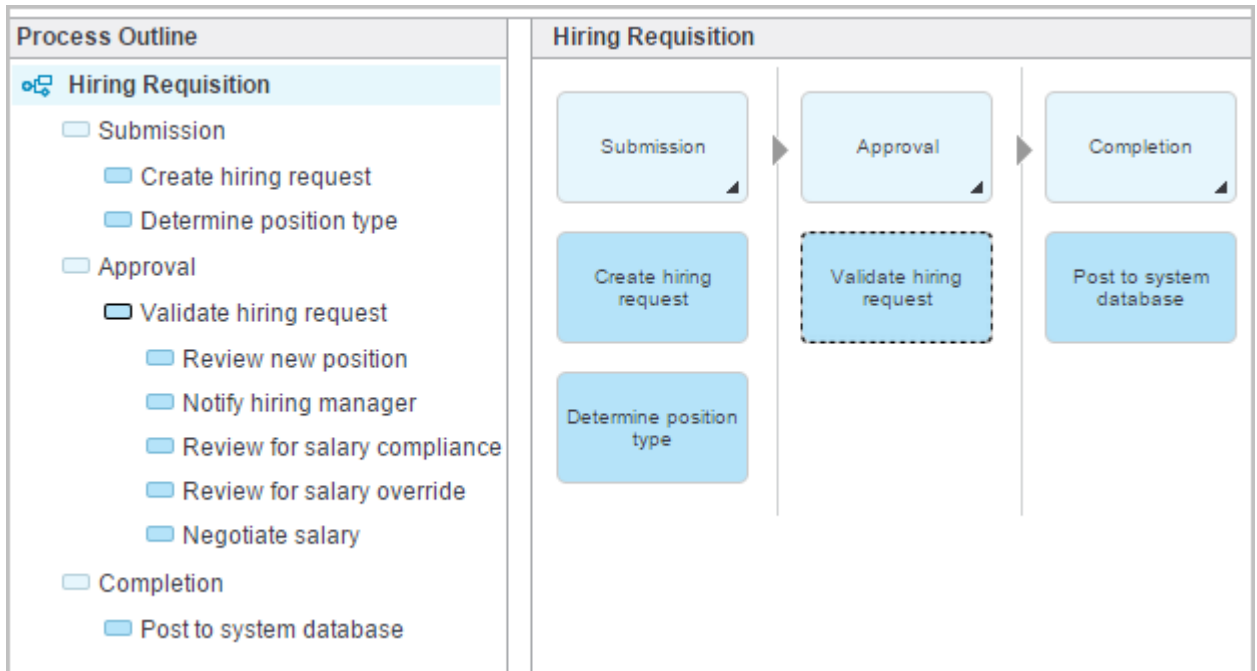
- ___ g. Right-click the next activity, **Cancel request**, after the subprocess activity and click **Delete**.



This section completes the refinement of the Approval milestone activities. The subprocess now reflects multiple process participants complete the atomic unit of work. Any information that was deleted from the discovery map can be added into the details of the milestone as a process narrative.

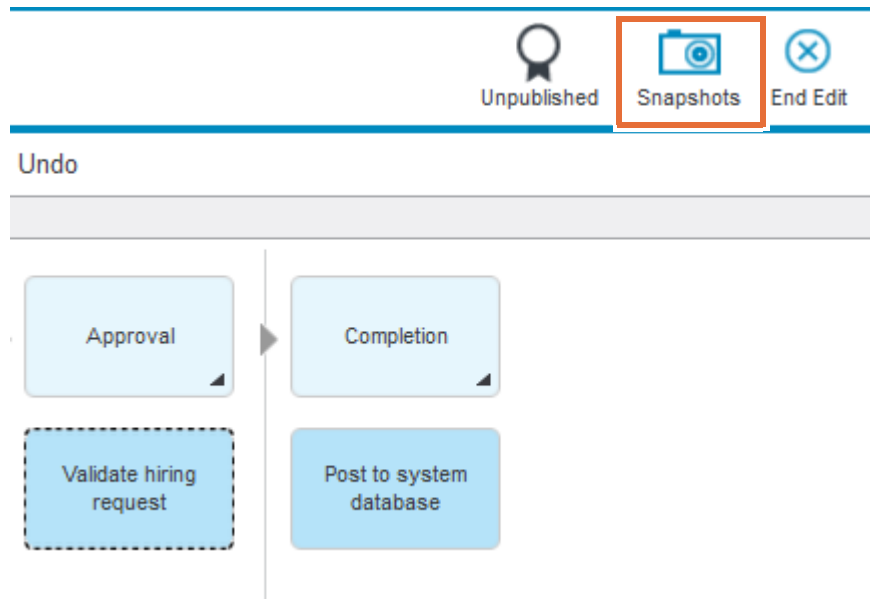
- ___ 4. Refine the activities in the Completion milestone.
- ___ a. The Completion milestone has two tasks that one process participant completes. To refine the discovery map to reflect one atomic unit of work by the process participant, right-click the **Send to job boards** activity and click **Delete**.

This section completes the refinement of the *Completion* milestone activities. One activity reflects the process participant that completes the atomic unit of work, the system database. The discovery map is now complete for the initial “as is” process.

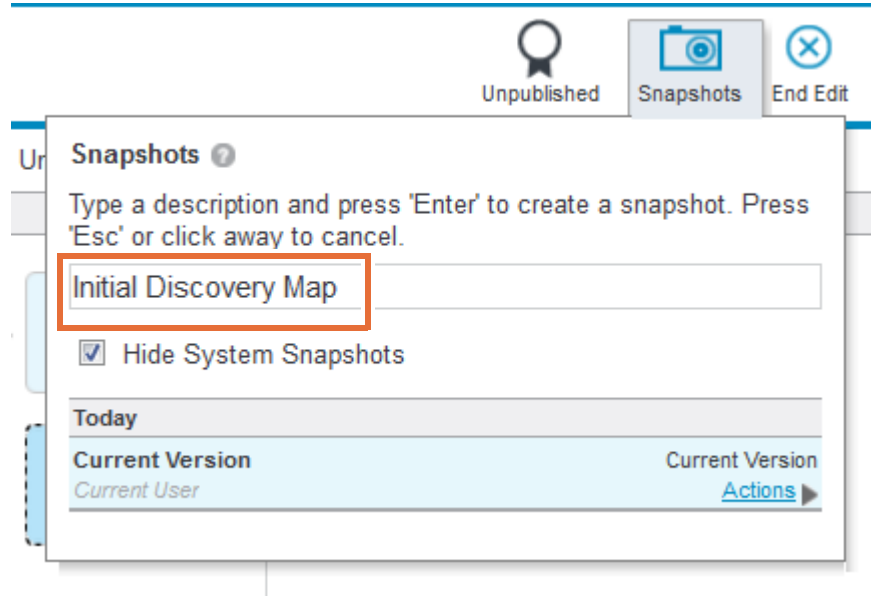


Part 4: Take a snapshot of the blueprint process

- ___ 1. Create a snapshot of the process discovery map.
 - ___ a. Click the **Snapshots** icon on the upper right of the **Hiring Requisition** process.



- ___ b. Type in the snapshot name: Initial Discovery Map



- ___ c. Press Enter to save the snapshot.

The initial discovery map for the Hiring Requisition process, without process details, is now saved as a snapshot in the Revision History. If you need to roll back the process, the snapshot is clearly identified in the list. Click a snapshot item to revert the process to a state.

End of exercise

Exercise review and wrap-up

This exercise provided the learner with a running process narrative from the process owner. The narrative was used to provide requirements for the discovery map creation. Milestones were added to the discovery map first, then the initial process steps in each milestone. The steps in the milestones were then modified and refined to be activities, or task, that were single atomic units of work. When the discovery map was refined and stable, a snapshot of the process state was taken and stored for rollback purposes if necessary.

Exercise 3. Capturing process details in Discovery Map

Estimated time

00:45

Overview

In this exercise, you capture process details in a Discovery Map from a process narrative that is provided.

Objectives

After completing this exercise, you should be able to:

- Capture important process details in a Discovery Map
- Document and collaborate on Discovery Map process details

Introduction

The BPM team captures process workflow detail during the descriptive modeling phase. To accomplish capturing the details in IBM Blueworks Live, the process author adds the information to the discovery map. The milestones or activities contain pre-established sections to store the process details.

Requirements

This exercise requires an active IBM Blueworks Live account. If an account does not exist for the student, then a 30-day trial account can be provisioned when the student signs up for one.

Exercise instructions

Preface

- To accomplish completing this exercise, the student must have an active Blueworks Live account.

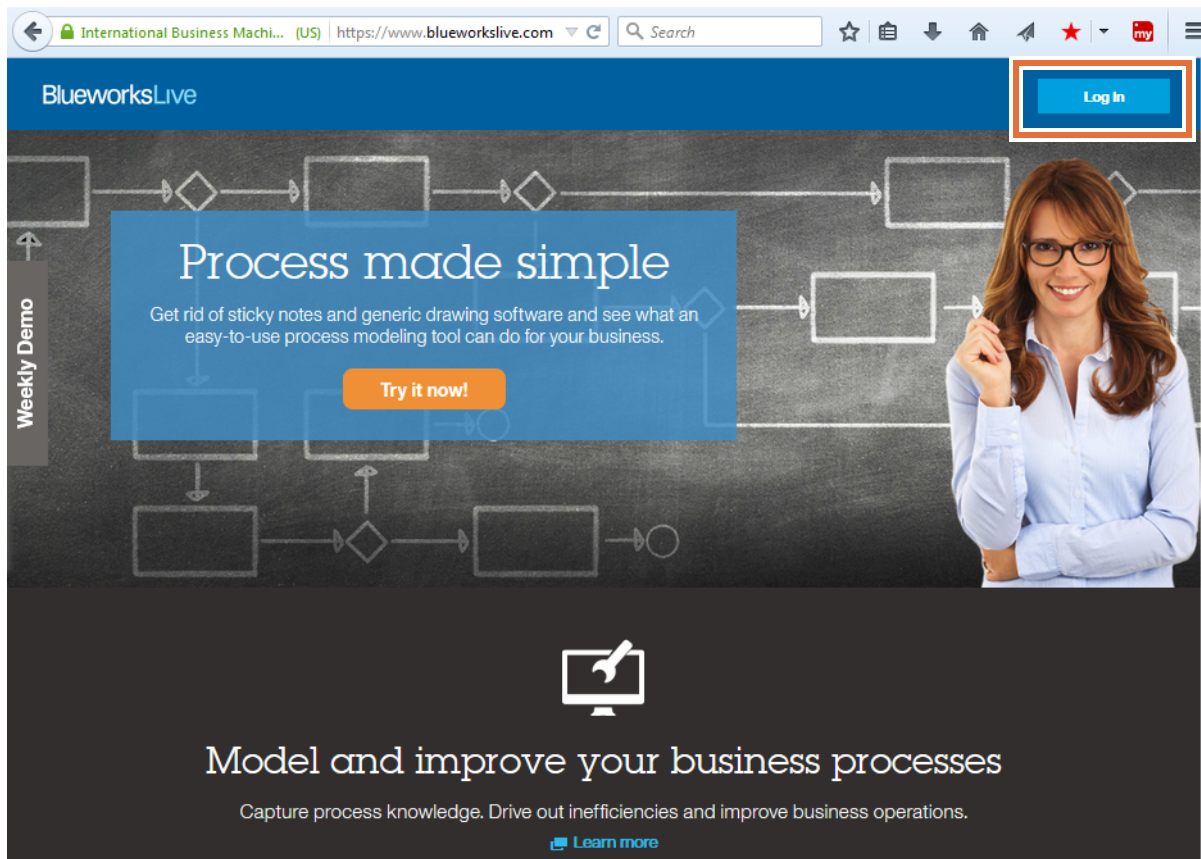
Part 1: Add process details to a milestone



Note

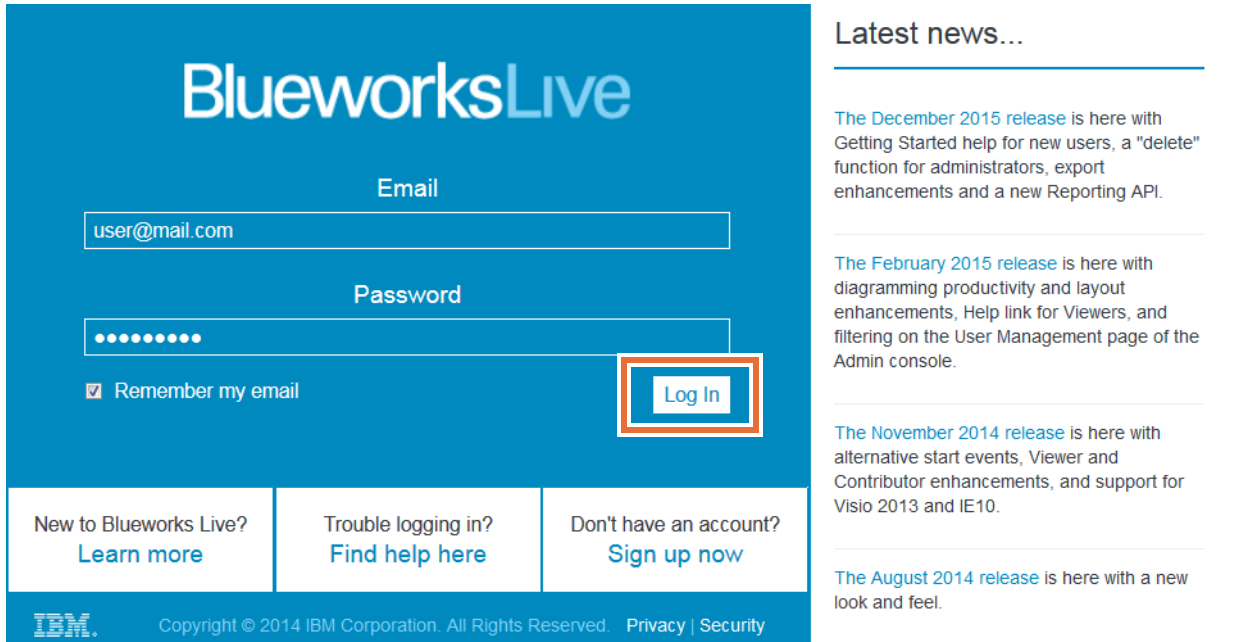
If you are already in Blueworks Live and are in the discovery map for the Hiring Requisition, skip step 1 and 2, proceed immediately to step 3 in this section.

- ___ 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 in the **Email** field.
- ___ d. Enter the account password in the **Password** field.

___ e. Click **Log In**.



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

BlueworksLive

Email

user@mail.com

Password

.....

☒ Remember my email

Log In

New to Blueworks Live?
Learn more

Trouble logging in?
Find help here

Don't have an account?
Sign up now

IBM. Copyright © 2014 IBM Corporation. All Rights Reserved. Privacy | Security

Latest news...

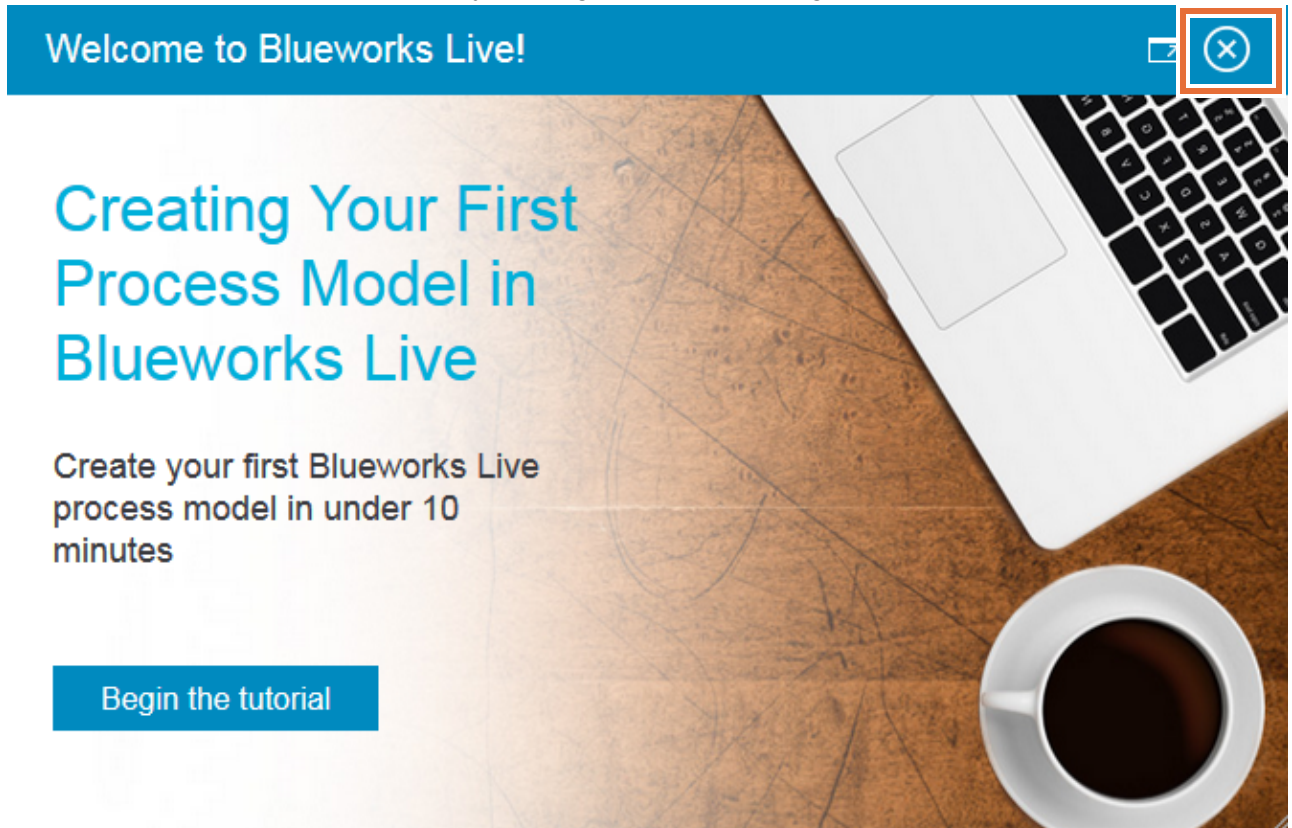
The December 2015 release is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

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

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

The August 2014 release is here with a new look and feel.

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



___ 3. Access the blueprint process.

___ a. Click the **Library** tab, click the **Processes** link.



___ b. Click the Hiring Requisition link.

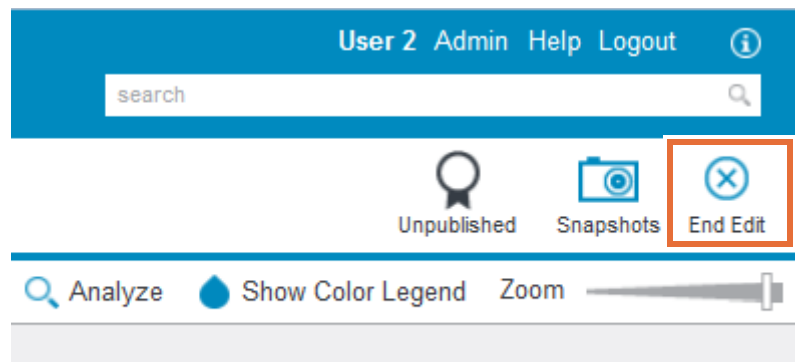


___ c. Verify that the Hiring Requisition blueprint process discovery map is now available and in the Edit mode.



Note

If the last icon on the right is labeled **End Edit**, then the discovery map is in the Edit mode.



Information

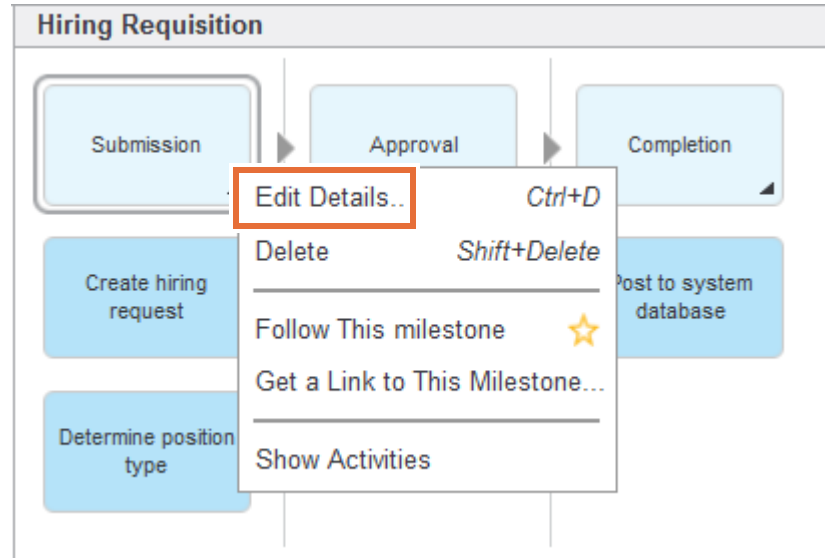
Process owner:

“The Human Resources administrator owns the Hiring Requisition process along with many other processes, such as the New Hire On-boarding process. For this process, the submission of a new hire request is typically what slows down the process because of bad data from the hiring manager.

The first concern is to make sure that the request is for a new position or to backfill an existing position. The system database review of the request handles this concern.”

___ 4. Add process details to the *Submission* milestone.

___ a. Right-click the **Submission** milestone in the discovery map and click **Edit Details**.



___ b. Click the **Business Owners** description entry box to add the owner of the process.

___ c. Type in the process owner title: HR Administrator

The screenshot shows the 'Submission' milestone details page. The page has a blue header with the title 'Submission' and a star icon. Below the header are tabs: 'Details', 'Problems', 'Policies', 'Documentation', 'Attachments', and 'Comments'. The 'Details' tab is selected. Under the 'Business Owners' section, there is a text input field containing 'HR Administrator'. The field is highlighted with a red rectangle. To the right of the field are a star icon, a plus button, and a minus button. Below this is the 'Experts' section, which also has a text input field and a star icon, but it is currently empty.

___ d. Click the **Experts** description entry box to add a consultant role to the milestone details.

___ e. Type in the expert title: Hiring Manager

- ___ f. Click the **+** circle icon next to the **Hiring Manager** to add more experts.

The screenshot shows the 'Submission' dialog box with the 'Details' tab selected. Under the 'Experts' section, the 'Hiring Manager' entry is highlighted with a red box, and a red circle highlights the '+' icon next to it. A tooltip 'Add item' is visible next to the '+' icon.

- ___ g. Type in the expert title: HR Manager
- ___ h. Click the **Systems** description entry box to add the system that is used in this milestone.
- ___ i. Type in the system information: HR database

The screenshot shows the 'Submission' dialog box with the 'Details' tab selected. Under the 'Systems' section, the 'HR database' entry is highlighted with a red box. The 'Cycle Time' section is also visible at the bottom.

- ___ 5. Add problem details to the **Submission** milestone.
- ___ a. Click the **Problems** tab at the top of the Submission details dialog box.
- ___ b. Type in the first problem: Erroneous data

___ c. Click the **Severity** icon one time to change it to **Medium**.

The screenshot shows the 'Submission' interface with the 'Problems' tab selected. The problem 'Erroneous data' is listed with a star icon. The 'Severity' column shows a yellow 'Medium' button, which is highlighted with a red box. The 'Frequency' column shows a green 'Low' button. There are also '+' and '-' icons next to the Frequency button.

___ d. Click the **Frequency** icon twice to change it to **High**.

The screenshot shows the 'Submission' interface with the 'Problems' tab selected. The problem 'Erroneous data' is listed with a star icon. The 'Severity' column shows a yellow 'Medium' button. The 'Frequency' column shows a red 'High' button, which is highlighted with a red box. There are also '+' and '-' icons next to the Frequency button.

___ e. Click the + circle icon to add another problem.

The screenshot shows the 'Submission' interface with the 'Problems' tab selected. The problem 'Erroneous data' is listed with a star icon. The 'Severity' column shows a yellow 'Medium' button. The 'Frequency' column shows a red 'High' button. A red box highlights the '+' icon next to the Frequency button.

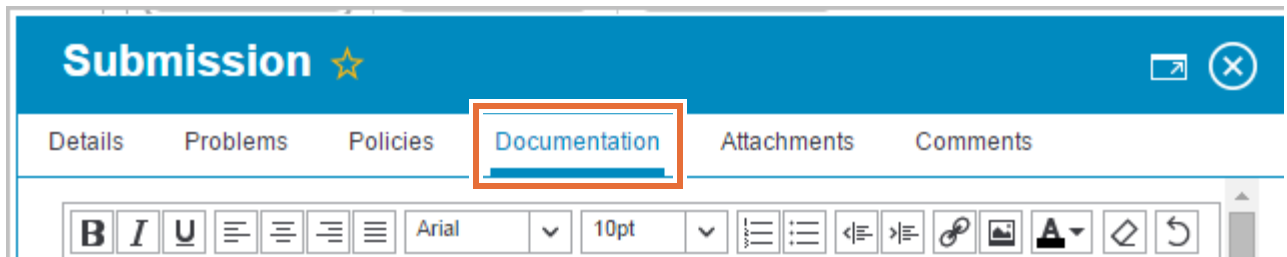
___ f. Type in the problem details: Takes too long to complete

___ g. Click the **Severity** icon one time to change it to **Medium**.

___ h. Click the **Frequency** icon one time to change it to **Medium**.

The screenshot shows the 'Submission' interface with the 'Problems' tab selected. There are two problems listed: 'Erroneous data' and 'Takes too long to complete'. Both have star icons. For 'Erroneous data', the 'Severity' is 'Medium' and 'Frequency' is 'High'. For 'Takes too long to complete', the 'Severity' is 'Medium' and 'Frequency' is 'Medium'. The 'Medium' button in the 'Frequency' column for the second problem is highlighted with a red box.

- ___ 6. Add documentation to the **Submission** milestone.
- ___ a. Click the **Documentation** tab in the Submission details dialog box.



- ___ b. Click the empty area to access the editor.
- ___ c. Click the editor text entry area.
- ___ d. Copy the following description and paste in the editor text entry area:

Process owner vision:

An efficient hiring requisition process that effectively handles the growth that the company expects in the next five years.

Process owner goal:

Improve the current hiring requisition process to maximize the available technology.
Handle constant changes to the way the company does business.



- ___ e. Click the **X** circle on the upper-right corner of the dialog box to exit the **Submissions** details.




Note

The descriptive modeling phase requires capturing as many details about the “as is” process as possible. However, some of the process details are going to be captured as the process model matures. For the purposes of this exercise, stop at what is known from the process narrative. The Approval and Completion milestone details do not need to be added now nor the rest of the details as of yet identified for the Submission milestone. Keep in mind though that the development of the process model is iterative, so adding details happens throughout all phases of process model development.

Part 2: Add process details to an activity

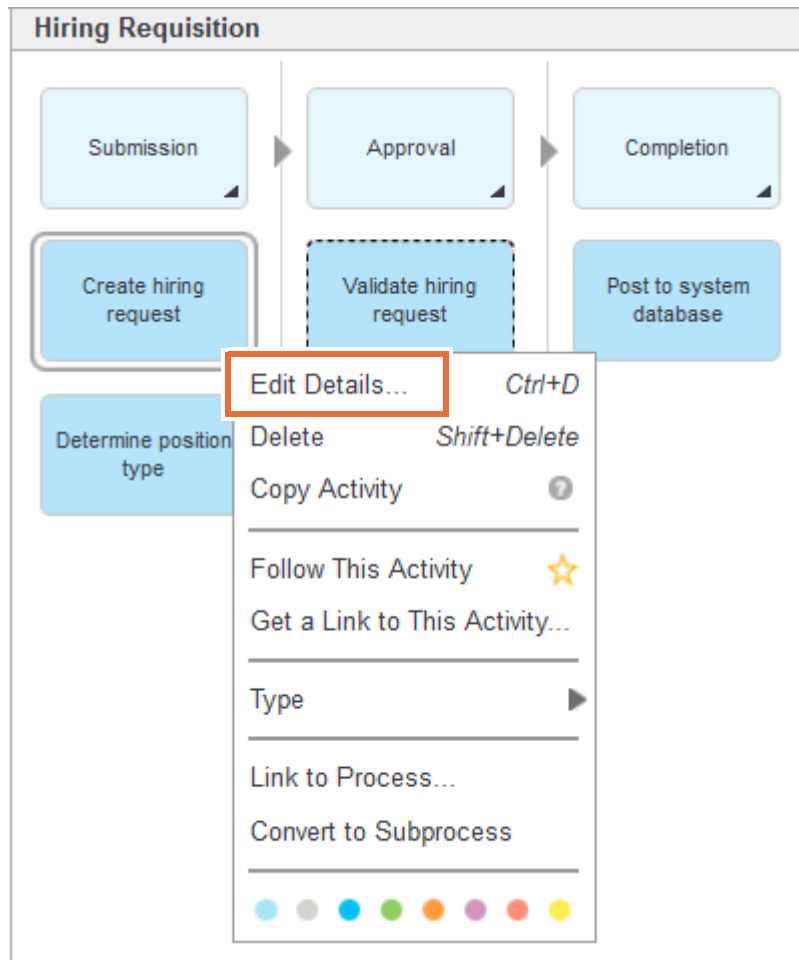


Information

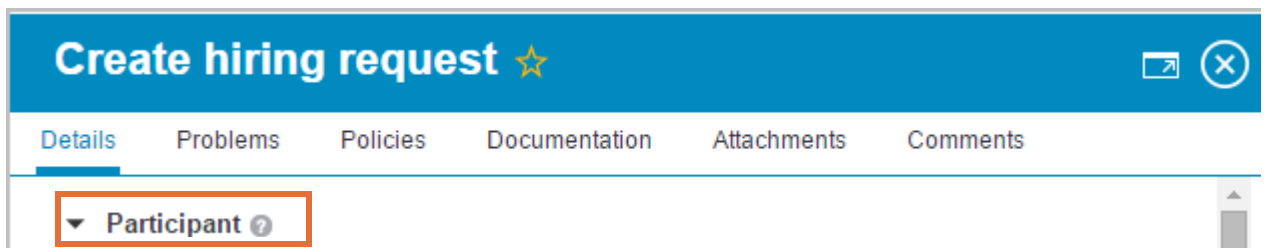
Process owner:

“During the submission phase of the Hiring Requisition process, a hiring manager submits a hiring request. From the submitted request, the system database evaluates the request to identify what type of position is being requested. This request is either a new position or backfill an existing position within a group in the organization.”

- ___ 1. Add details to the **Create hiring request** activity.
- ___ a. Right-click the **Create hiring request** activity and click **Edit Details**.



- ___ b. Click the **Participant** description entry box.



- ___ c. Type in the participant's title: **Hiring Manager**. Notice that an auto-complete feature in IBM Blueworks Live provides you with the ability to select the **Hiring Manager** title from the glossary. **Hiring Manager** was automatically added to the glossary when it was typed in the milestone details.



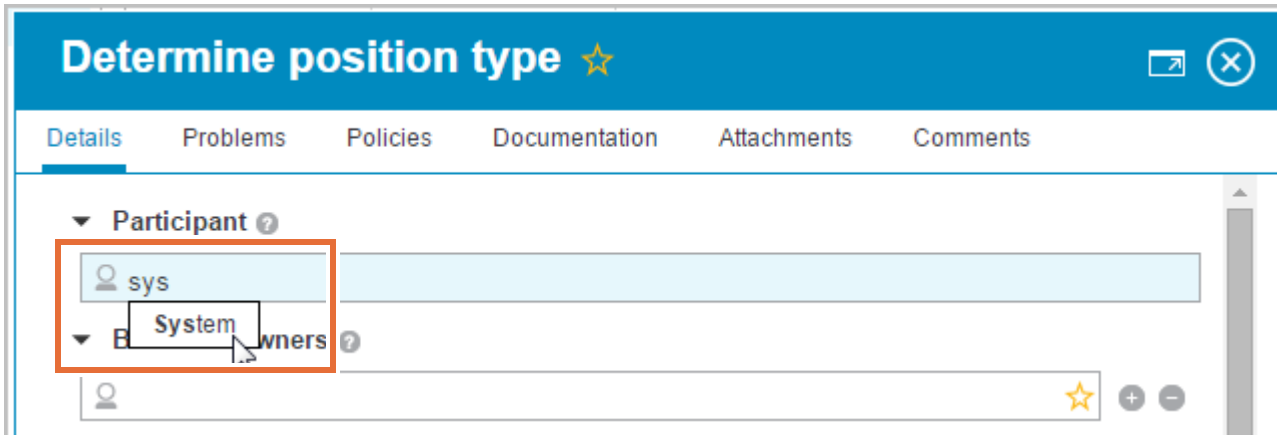
Note

For the purposes of this exercise, only the **Participant** details are necessary for the activities in the discovery map. However, a lot more details are added during the descriptive modeling effort than what is described in this exercise. Some of the details can be copied from the entries that are made in the milestone details if necessary. Other details are captured in later iterations of the process model

- ___ d. Click the blue **X** circle icon to exit the **Create hiring request** activity in the *Submission* milestone.

- ___ 2. Add details to the **Determine position type** activity.
- ___ a. Right-click the **Determine position type** activity and click **Edit Details**.
- ___ b. Click the **Participant** description entry box.

- ___ c. Type the letters *sys* and when the word *System* is shown, click the glossary entry to place it in the entry box.



- ___ d. Click the blue **X** circle icon to exit the Determine position type details dialog box.

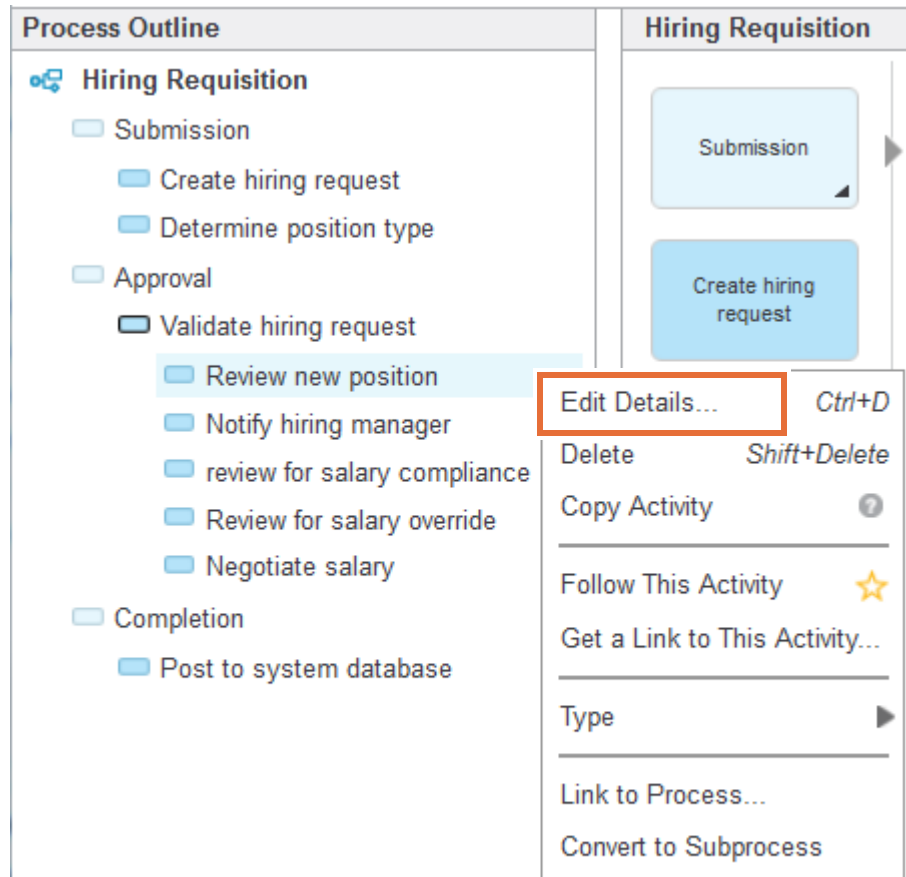


Information

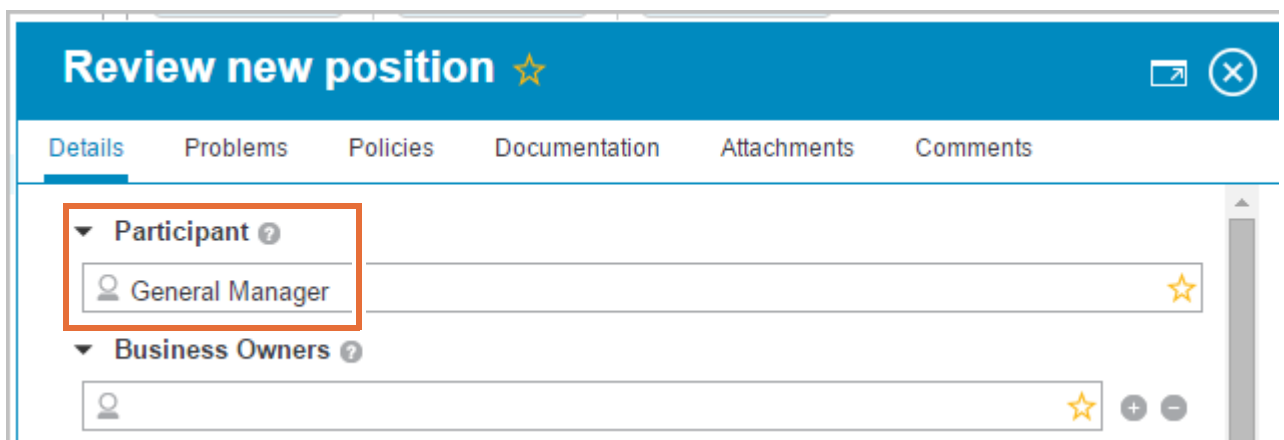
Process owner:

“During the approval phase of the Hiring Requisition process, a general manager reviews only the new position requests. If the new position request is approved or disapproved, the system database notifies the hiring manager of the decision. All new positions and existing position request that are approved go to the system database for salary compliance. Salary requests that are out of compliance are sent to the HR administrator for an override or route back to the hiring manager for a resubmission or request cancellation.”

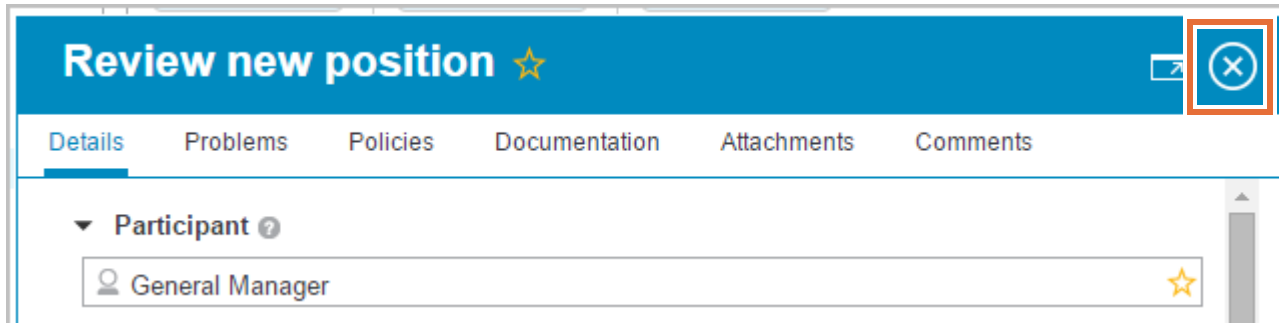
- ___ 3. Add **Participant** details to the activities in the **Validate hiring request** subprocess in the **Approval** milestone.
- ___ a. Right-click the **Review new position** activity in the **Process Outline** and click **Edit Details**.



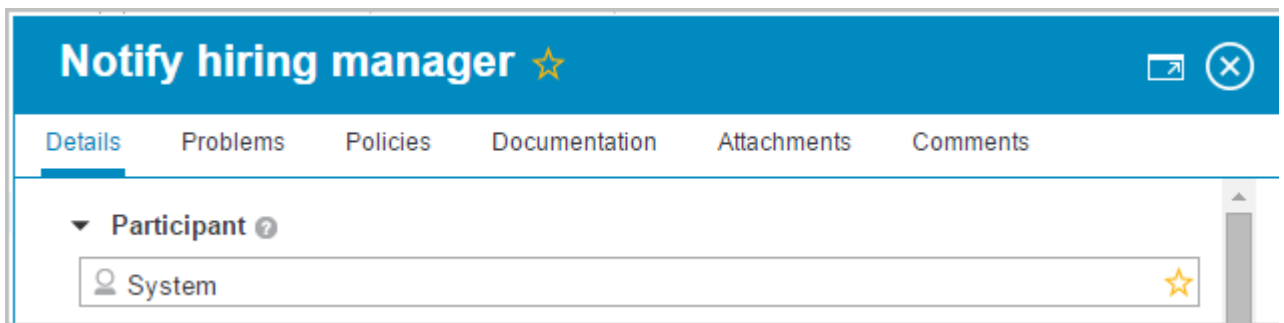
- ___ b. Click the **Participant** description entry box.
- ___ c. Type in the participant title: General Manager



- ___ d. Click the blue **X** circle icon to exit the dialog box.



- ___ e. Right-click the **Notify hiring manager** activity in the **Process Outline** and click **Edit Details**.
- ___ f. Click the **Participant** description entry box.
- ___ g. Type in the letters *sys* and then select the auto-complete entry *System* from the glossary box.



- ___ h. Click the blue **X** circle icon to exit the dialog box.
- ___ i. Right-click the **Review for salary compliance** activity in the **Process Outline** and click **Edit Details**.
- ___ j. Click the **Participant** description entry box.
- ___ k. Type in the letters *sys* and then select the auto-complete entry *System* from the glossary box.
- ___ l. Click the blue **X** circle icon to exit the dialog box.
- ___ m. Right-click the **Review for salary override** activity in the **Process Outline** and click **Edit Details**.
- ___ n. Click the **Participant** description entry box.

- ___ o. Type in the letters HR and select the auto-complete entry HR Administrator from the glossary box.

Review for salary override ☆

Details Problems Policies Documentation Attachments Comments

▼ Participant ?

HR

HR Administrator
HR Docs Team
HR Manager
HR Specialist

▼ Experts ?

- ___ p. Click the blue **X** circle icon to exit the dialog box.
- ___ q. Right-click the **Negotiate salary** activity in the **Process Outline** and click **Edit Details**.
- ___ r. Click the **Participant** description entry box.
- ___ s. Type in the letters Hir and select the auto-complete entry Hiring Manager from the glossary box.

Negotiate salary ☆

Details Problems Policies Documentation Attachments Comments

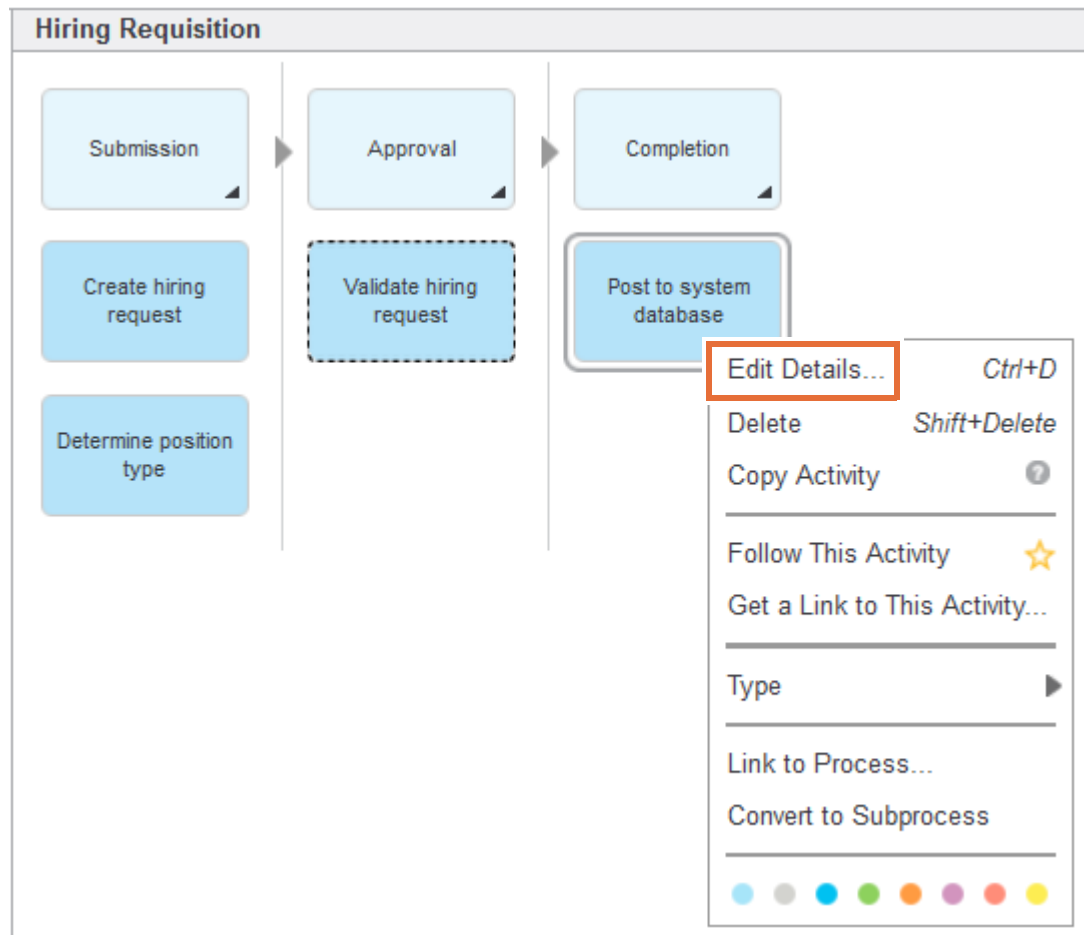
▼ Participant ?

Hiring Manager

▼ Business Owners ?

- ___ t. Click the blue **X** circle icon to exit the dialog box.

- ___ 4. Add **Participant** details to the activities in the **Post to system database** activity in the **Completion** milestone.
 - ___ a. Right-click the **Post to system database** activity in the **Completion** milestone and click **Edit Details**.



- ___ b. Click the **Participant** description entry box.
- ___ c. Type in the letters *Sys* and then select the auto-complete entry *System* from the glossary box.
- ___ d. Click the blue **X** circle icon to exit the dialog box.

This section completes adding details to the “as is” process discovery map. More details can be added later in the iterative development of the process model. A process author can take another snapshot of the discovery map and name it *Discovery Map with Details*.

End of exercise

Exercise review and wrap-up

This exercise was about adding details to the “as is” discovery map of the Hiring Requisition process. To begin, the details were added to all the milestones in the discovery map. This included added Business Owner information, Expert information, and Systems information. On the Problems tab, details were added about the Submission milestone. On the Documentation tab, the process owner vision and goal were captured.

Details were then added to the activities in the discovery map. The process modeling development was relegated to capturing the participant detail for each activity.

Exercise 4. Creating and modifying a process diagram in IBM Blueworks Live

Estimated time

00:30

Overview

In this exercise, you create a process diagram from a discovery map and modify the diagram to meet process narrative requirements.

Objectives

After completing this exercise, you should be able to:

- Create a process diagram from a Discovery Map
- Modify the process diagram in an IBM Blueworks Live blueprint
- Add elements to a process diagram based on a process narrative
- Examine decision tasks with decision discovery

Introduction

A process diagram in IBM Blueworks Live is the graphical representation of the process. The difference between the discovery map and process diagram is the use of BPMN elements. The process diagram allows a user to graphically represent process flow, process tasks, and process flow objects such as events.

Requirements

This exercise requires an active IBM Blueworks Live account. If an account does not exist for the student, then a 30-day trial account can be provisioned when the student signs up for one.

Exercise instructions

Preface

- To accomplish completing this exercise, the student must have an active Blueworks Live account.

Part 1: Create a process diagram from the discovery map



Note

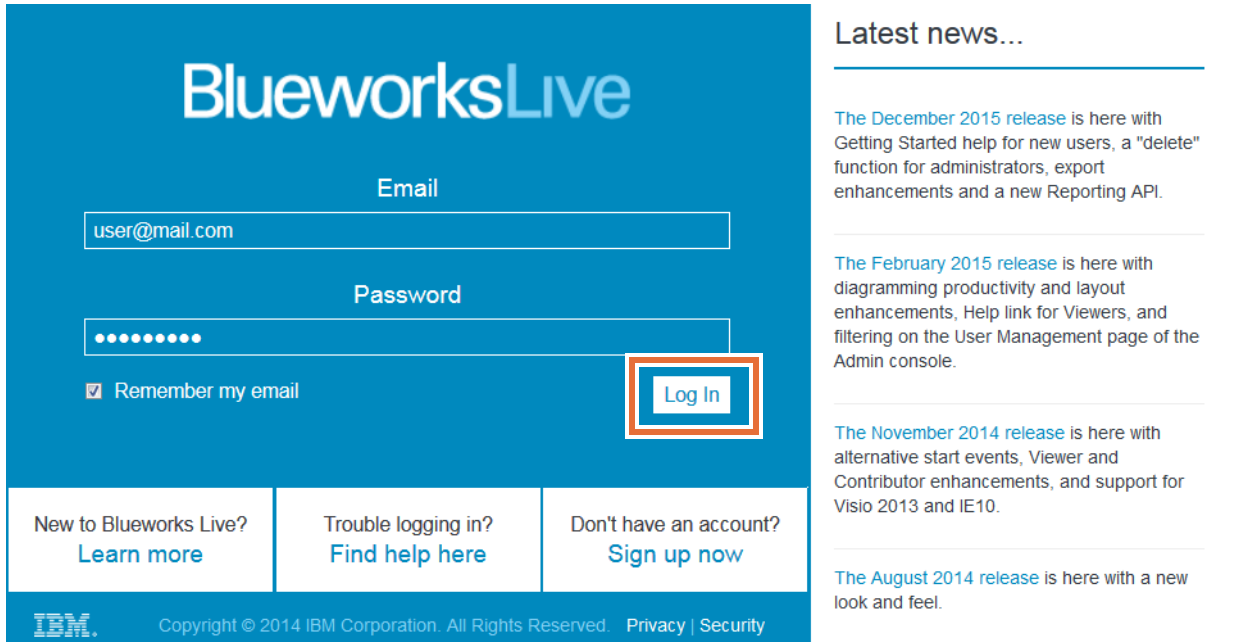
If you are already in Blueworks Live and are in the discovery map for the Hiring Requisition, skip step 1 and 2, and proceed immediately to step 3 in this section.

- ___ 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 in the **Email** field.
- ___ d. Enter the account password in the **Password** field.

___ e. Click **Log In**.



The login page features a blue header with the 'BlueworksLive' logo. Below the logo are input fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). A 'Remember my email' checkbox is checked. A 'Log In' button is highlighted with a red and blue border. To the right, a 'Latest news...' section lists three releases: December 2015, February 2015, and November 2014. At the bottom, three links are provided: 'New to Blueworks Live? Learn more', 'Trouble logging in? Find help here', and 'Don't have an account? Sign up now'. The footer includes the IBM logo and copyright information for 2014.

BlueworksLive

Email

user@mail.com

Password

.....

☒ Remember my email

Log In

New to Blueworks Live?
Learn more

Trouble logging in?
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Latest news...

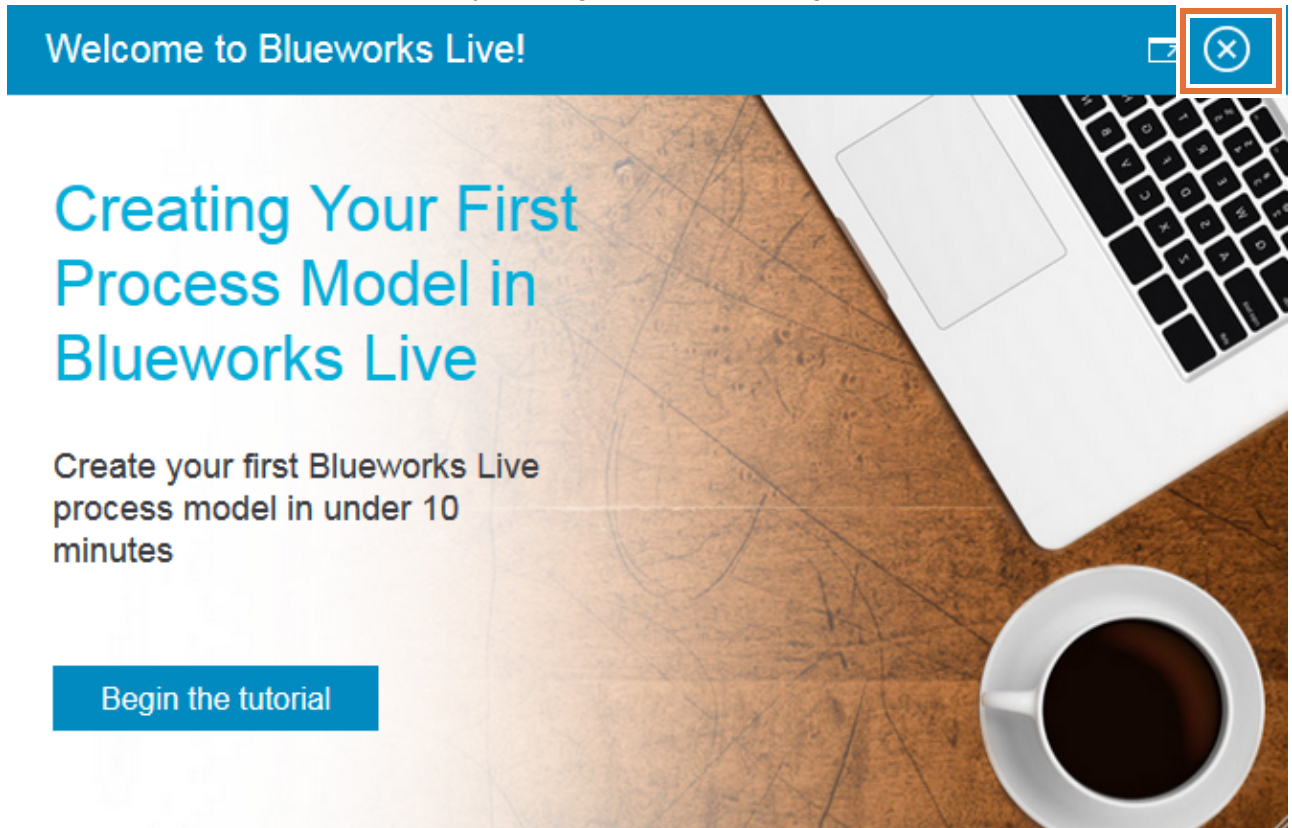
The December 2015 release is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

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

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

The August 2014 release is here with a new look and feel.

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



___ 3. Access the blueprint process.

___ a. Click the **Library** tab, click the **Processes** link.



___ b. Click the Hiring Requisition link.

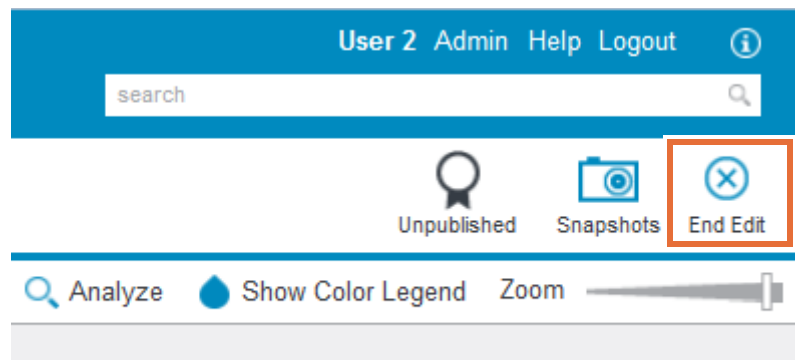


___ c. Verify that the Hiring Requisition blueprint process discovery map is now available and in the Edit mode.



Note

If the last icon on the right is labeled **End Edit**, then the discovery map is in the Edit mode.



___ 4. Create the initial process diagram.

___ a. Click the **Process Diagram** menu at the upper left of the **Hiring Requisition** process.

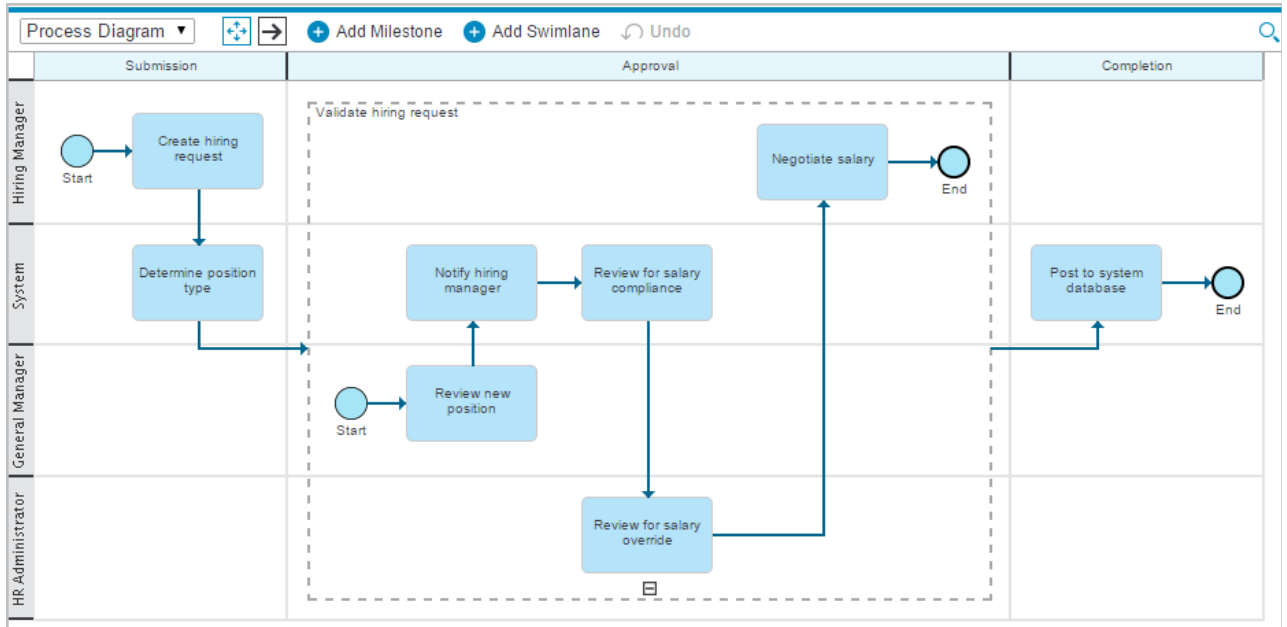
- ___ b. Select **Process Diagram** from the menu.

The screenshot shows the IBM BlueworksLive interface. At the top, there's a blue header with 'BlueworksLive' and navigation links for 'Work', 'Community', and 'Library'. Below the header, the breadcrumb trail reads 'Training Space > Hiring Requisition'. A tag 'hr department' and an 'Edit Tags' link are visible. On the left, a menu is open, showing 'Process Diagram' selected. The main area displays a process map for 'Hiring Requisition' with milestones like 'Submission', 'Approval', and 'Completion', and activities like 'Create hiring request', 'Determine position type', and 'Validate hiring request'.

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

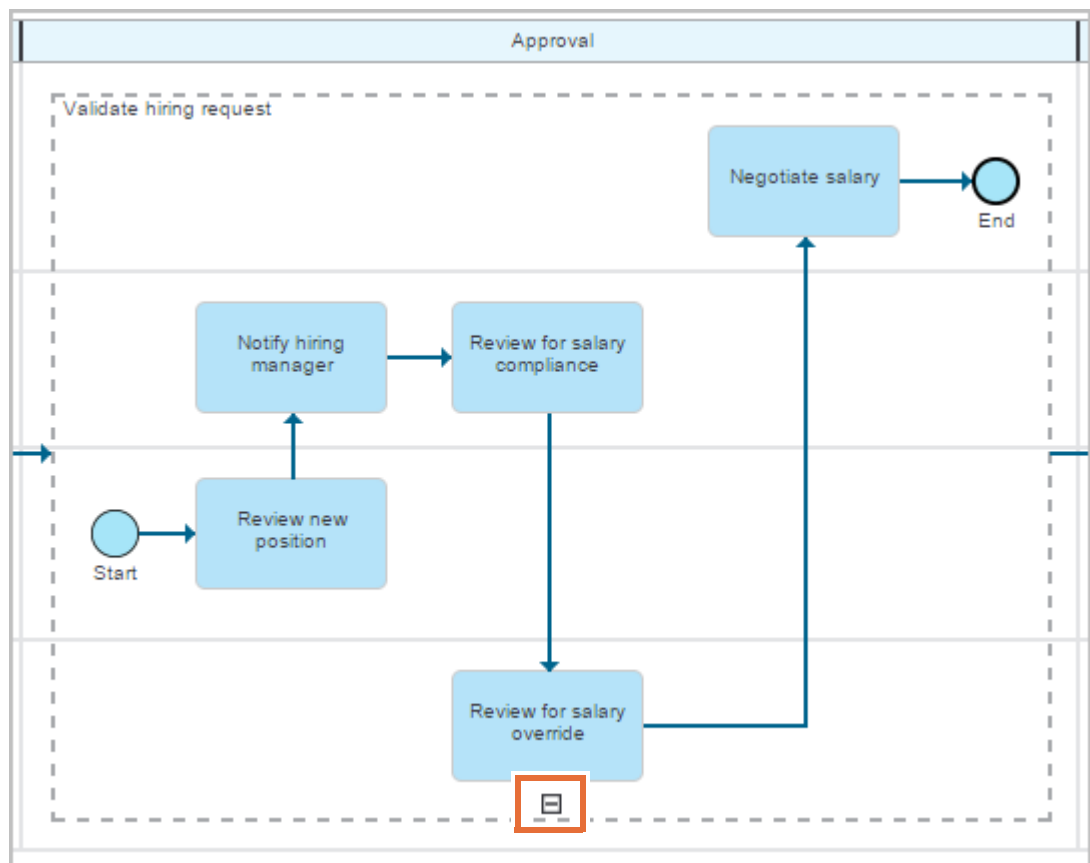
The screenshot shows a 'Create Process Diagram' dialog box. It has a blue header with the title and a close button. The main text explains that Blueworks Live automatically creates a process diagram using information entered on the map view, and that workflow items like decisions and events added in the diagram will not be displayed in the map view. It also recommends adding the diagram after defining process milestones and activities. A 'Create Diagram' button is highlighted in the bottom right corner.

The process diagram is created and ready for modification.

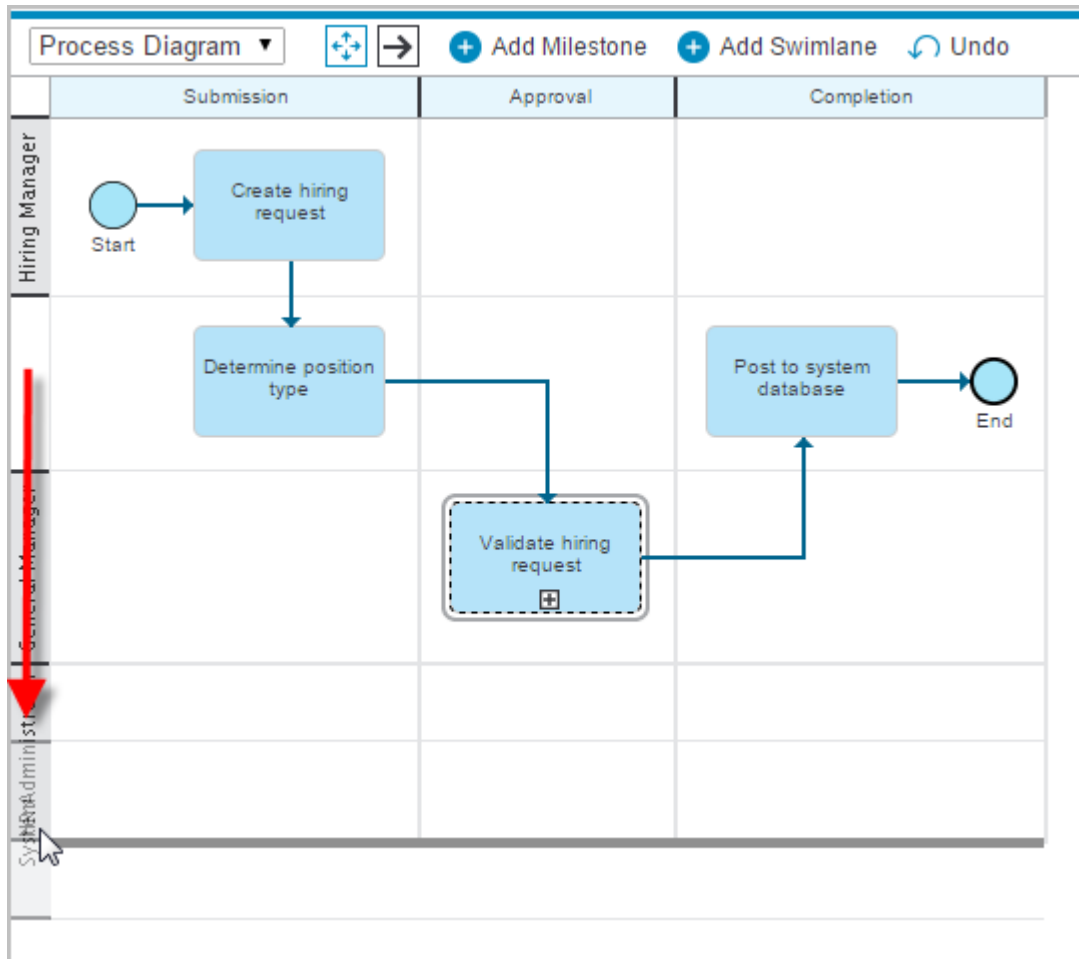


Part 2: Modify the process diagram

- ___ 1. Minimize the subprocess display on the process diagram
 - ___ a. Click the **minus (-)** icon at the bottom of the subprocess boundary.



- ___ 2. Adjust the lanes in the process diagram.
- ___ a. Click and hold the cursor on the **System** lane of the process diagram.
- ___ b. Drag the **System** lane after the **HR Administration** at the bottom of the process diagram.

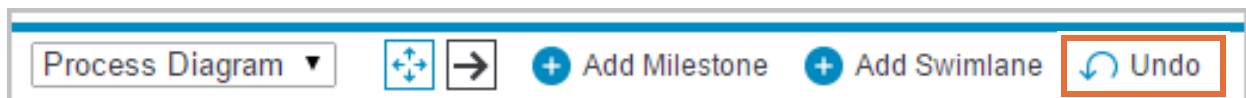


- ___ c. Release the cursor to place the **System** lane at the bottom of the process diagram.

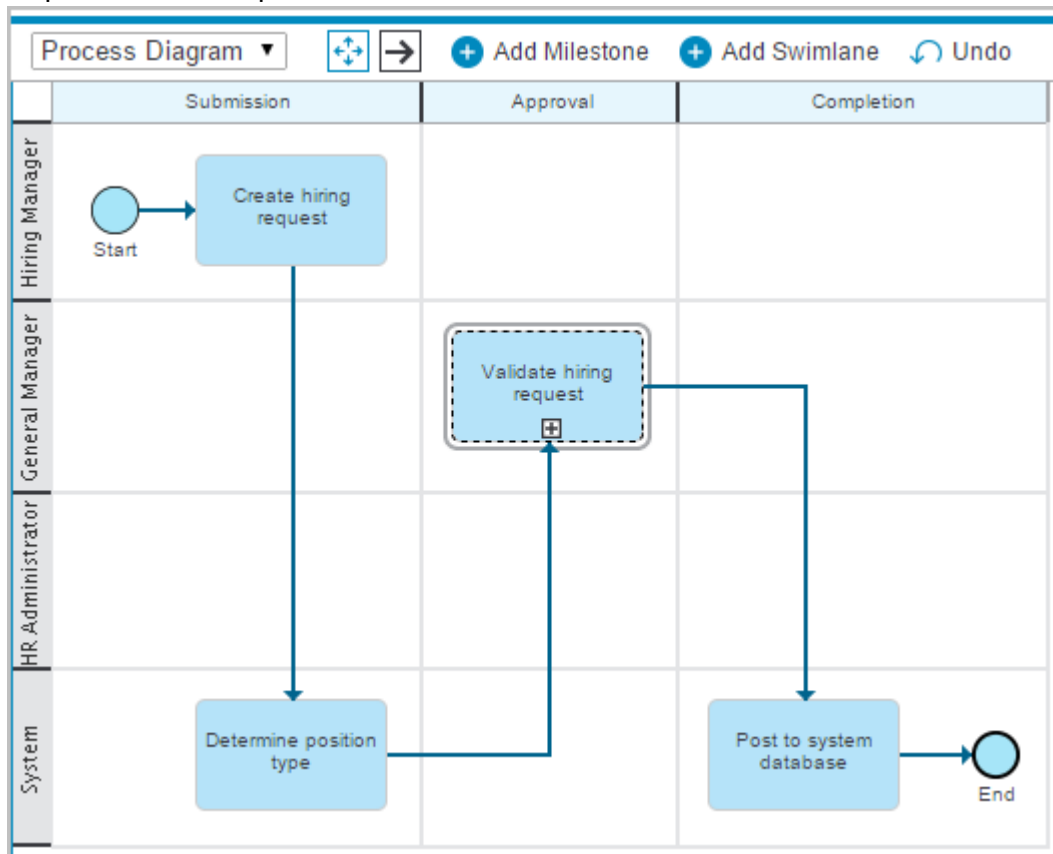


Note

If you do not successfully place the *System* lane at the bottom of the process diagram, there are two ways to fix the error. Click the **Undo** icon at the top of the interface and start again or click and hold the system lane again and drag it to the bottom until it is at the right place.



The process diagram is ready to add more flow objects to match the requirements that are gleamed from the process owners process narrative.



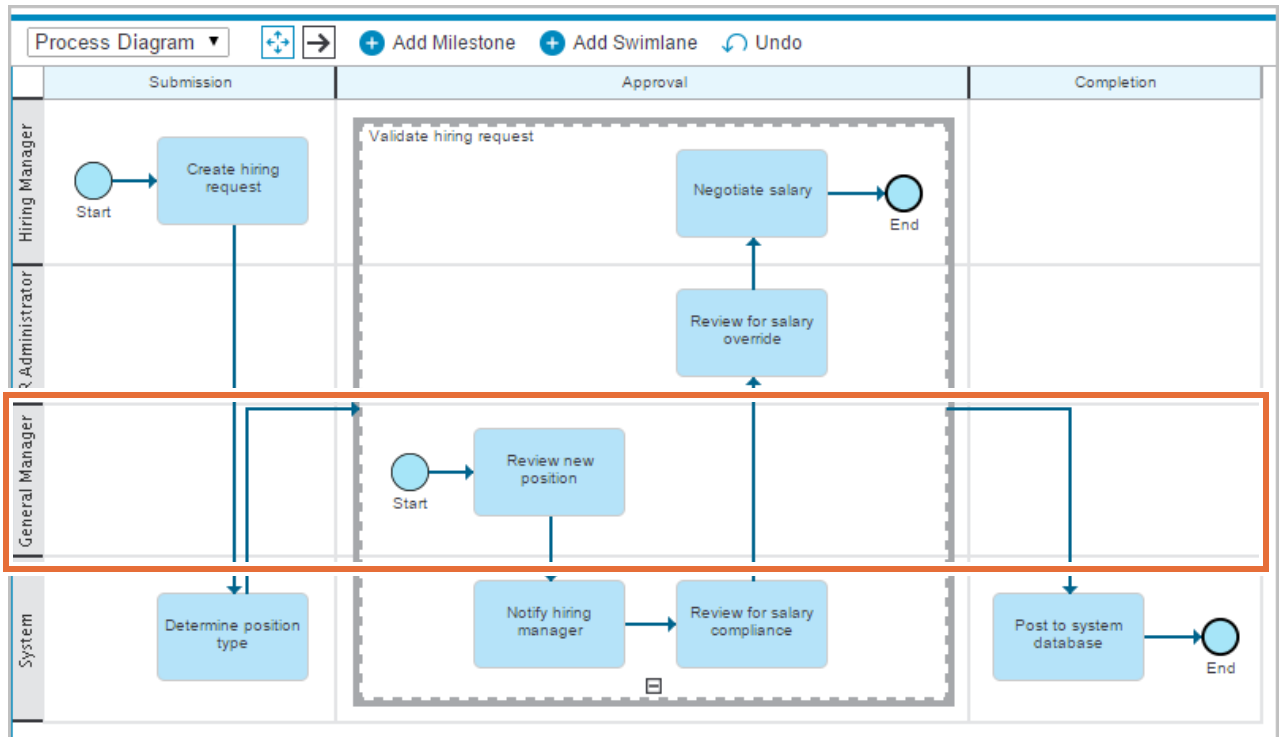
Information

Process owner:

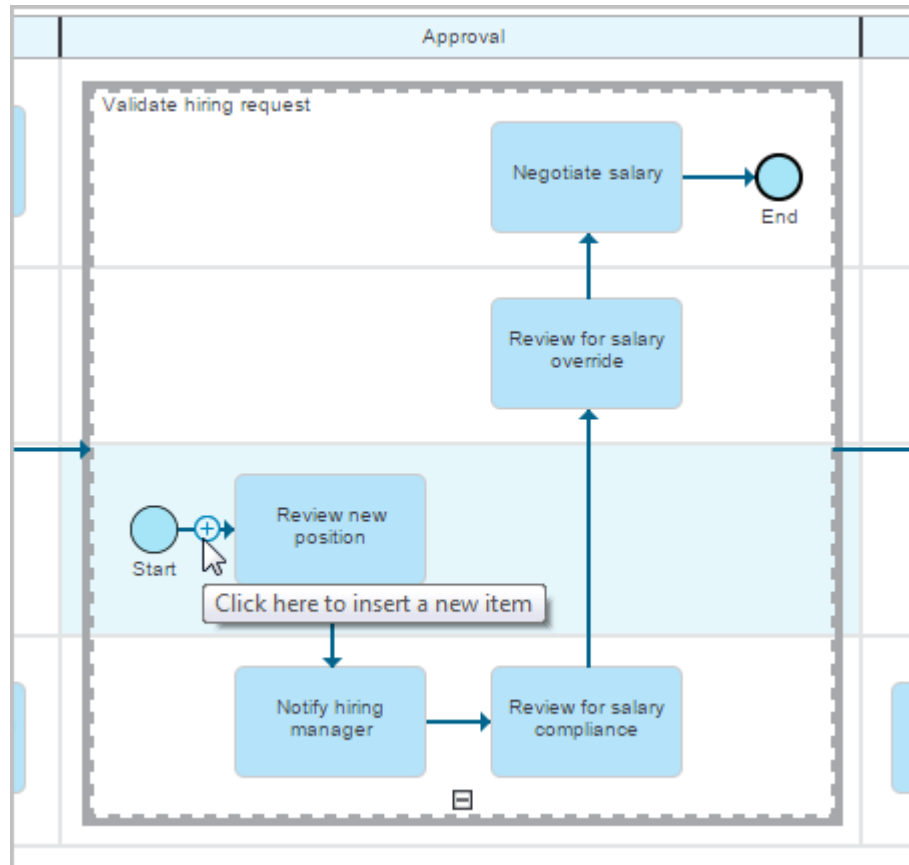
“During the approval phase of the Hiring Requisition process, a general manager reviews only the new position requests. If the new position request is approved or disapproved, the system database notifies the hiring manager of the decision. All new positions and existing position request that are approved go to the system database for salary compliance. Salary requests that are out of compliance are sent to the HR administrator for an override or route back to the hiring manager for a resubmission or request cancellation.”

- ___ 3. Add a gateway flow object to the process diagram.
 - ___ a. Click the **plus (+)** icon on the subprocess to expand the diagram.

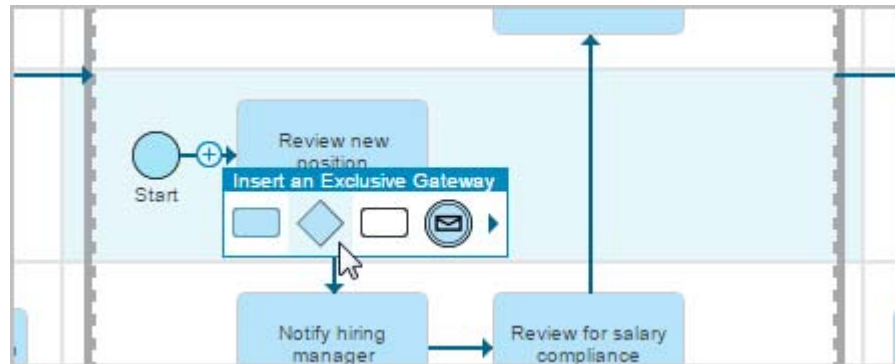
- ___ b. Click, hold, and drag the **General Manager** lane right above the **System** lane at the bottom of the diagram.



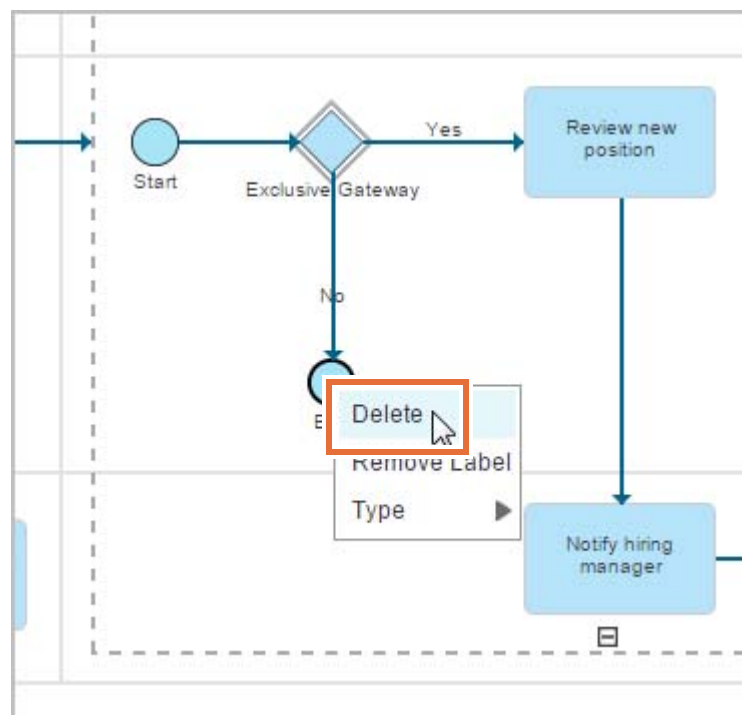
- ___ c. Roll the cursor over the first process flow line after the subprocess **Start** event.



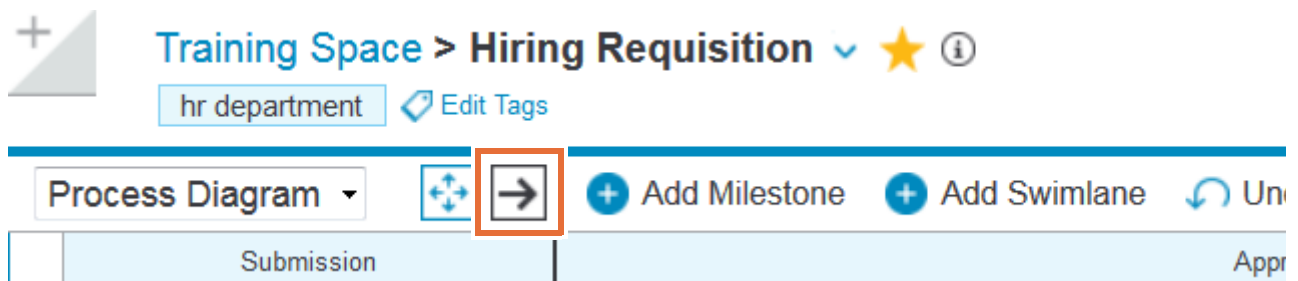
- ___ d. Click the **+** circle icon to insert a flow object on the flow line.
- ___ e. Select the **Decision** gateway icon to insert it into the diagram.



- ___ f. Right-click the **End** event that is attached to the **Decision** gateway and click **Delete**.

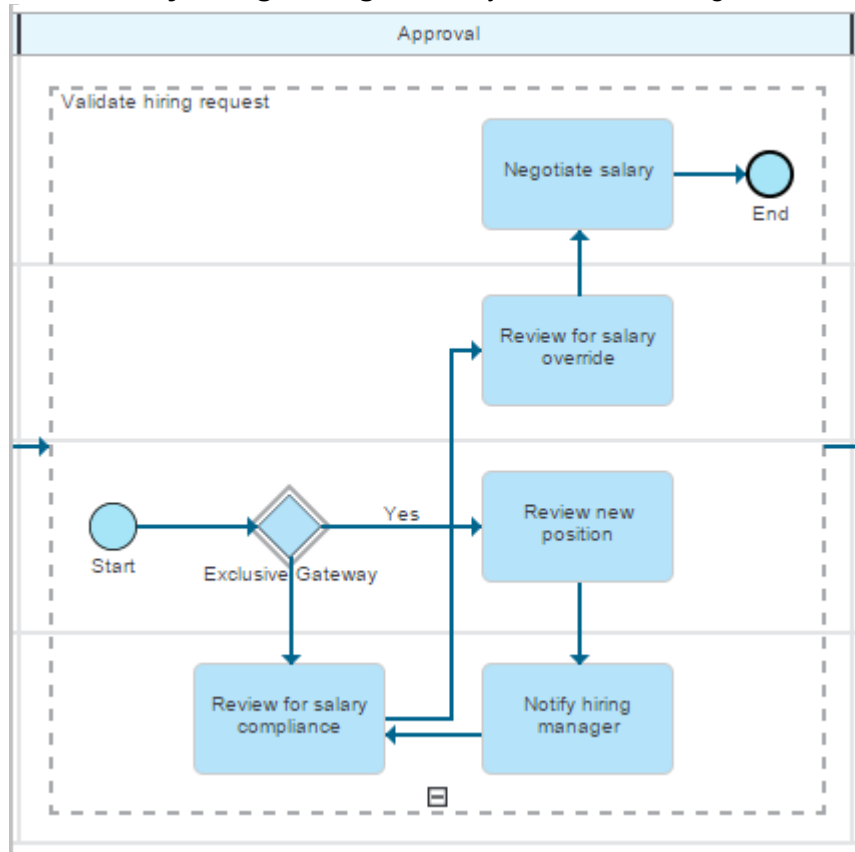


- ___ g. Click the **Flow Line** icon at the top of the process diagram interface.

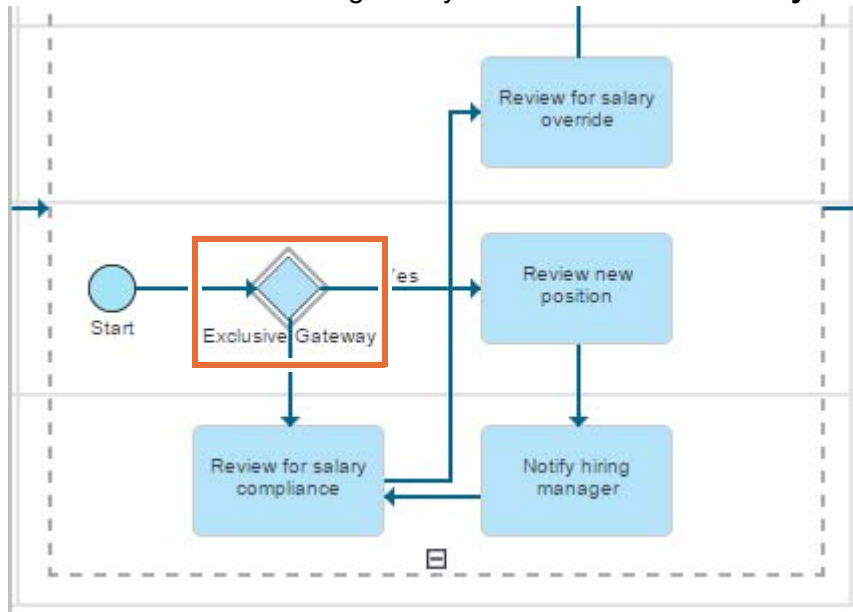


- ___ h. Click and hold the cursor down on the **Decision** gateway on the diagram.

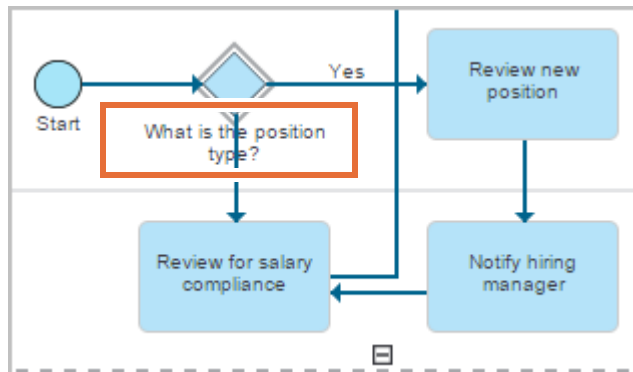
- ___ i. Drag the cursor to the **Review for salary compliance** activity in the diagram and release the mouse. The **Review for salary compliance** activity is now shown on the left side of the **Notify hiring manager** activity instead of the right.



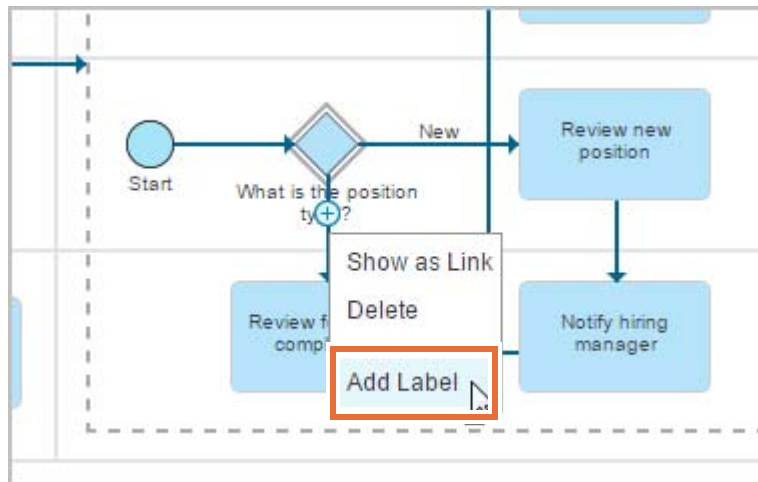
- ___ j. Click one time on the Decision gateway label: **Exclusive Gateway** to highlight it in blue.



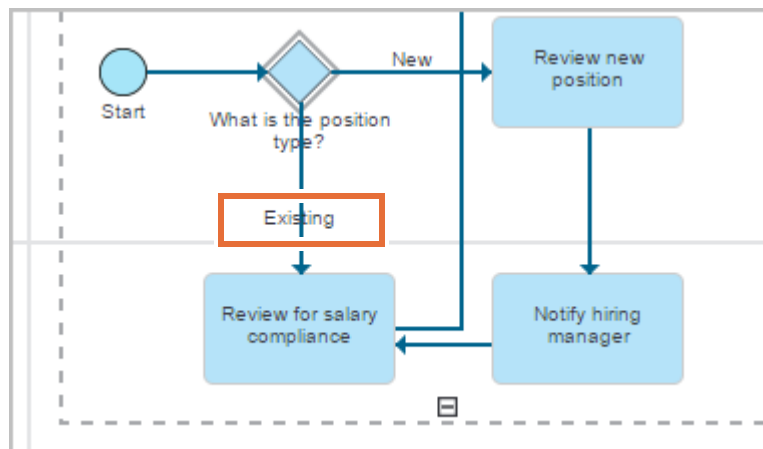
- ___ k. Type in the new label for the gateway in the form of a question: What is the position type?



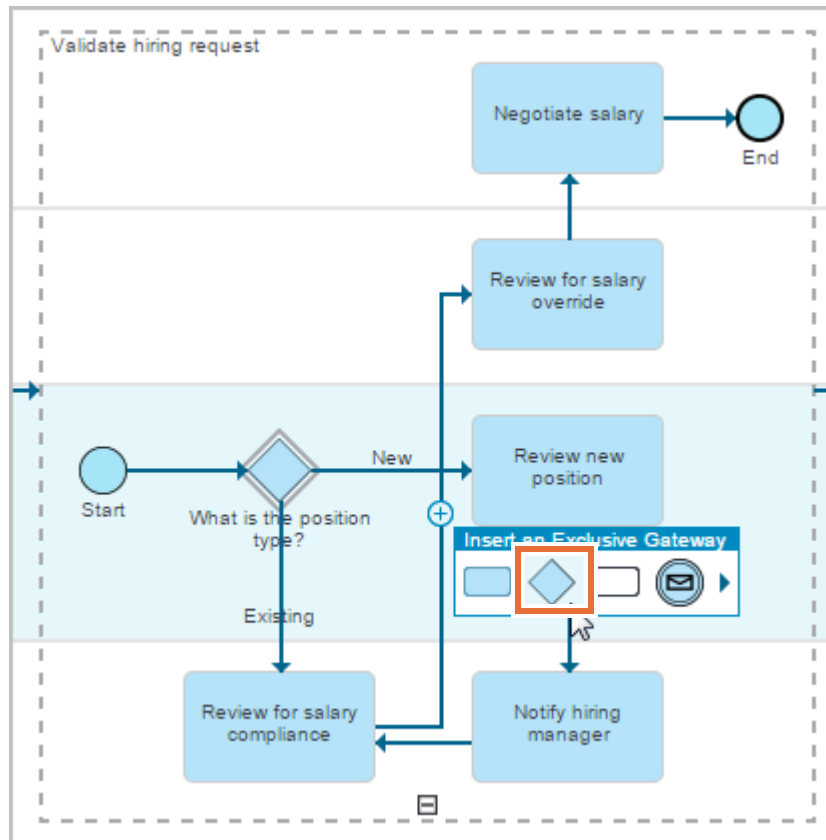
- ___ l. Now, answer the gateway question in the diagram. Click one time on the **Yes** flow line from the gateway.
- ___ m. Type in a label to answer the question: *New*
- ___ n. Move your cursor to the second flow line out of the gateway that is connected to the **Review for salary compliance** until you see the + plus icon.
- ___ o. Right-click and click **Add Label**.



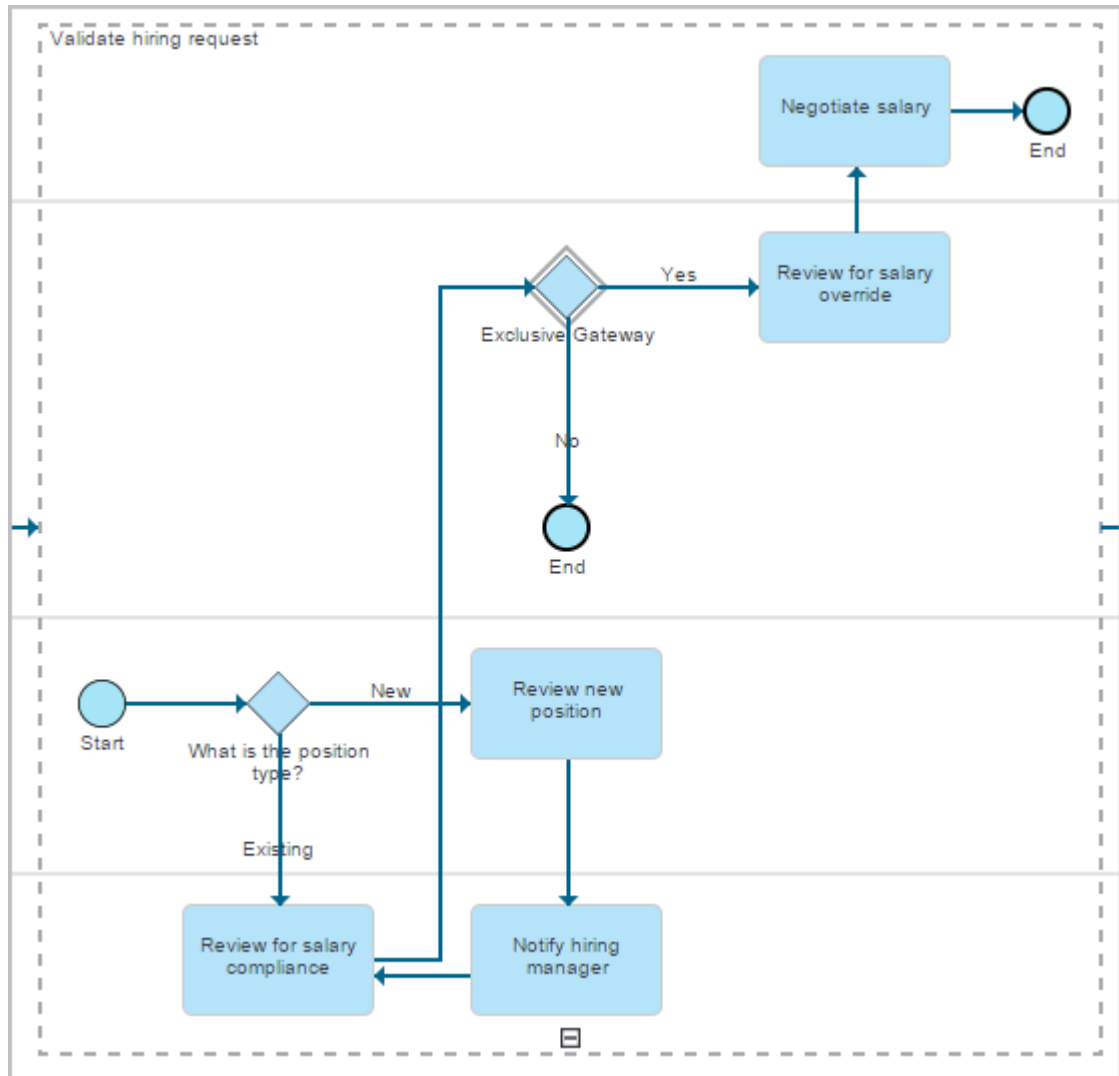
- ___ p. Click one time on the **Label** for the flow line to highlight it in blue.
- ___ q. Type in the answer to the gateway question on this flow line: *Existing*



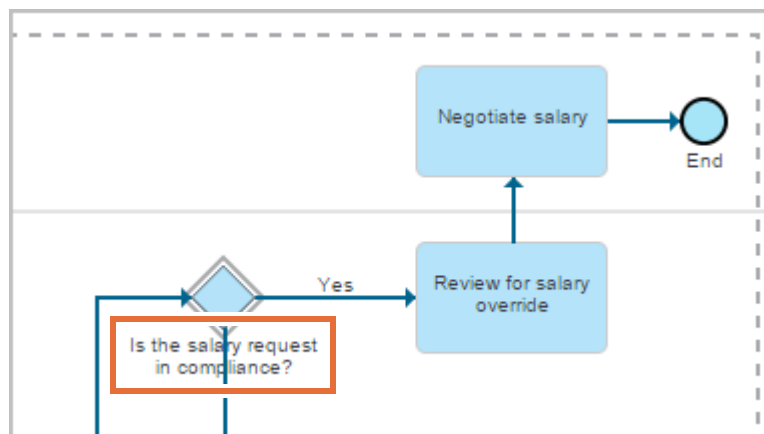
- ___ 4. Add a second gateway flow object to the process diagram.
 - ___ a. Roll over the cursor on the flow line that connects the **Review for salary compliance** activity and **Review for salary override** activity.
 - ___ b. Click the **+** plus icon to insert a gateway in the process diagram.
 - ___ c. Select the **Decision** gateway to insert it in the flow line.



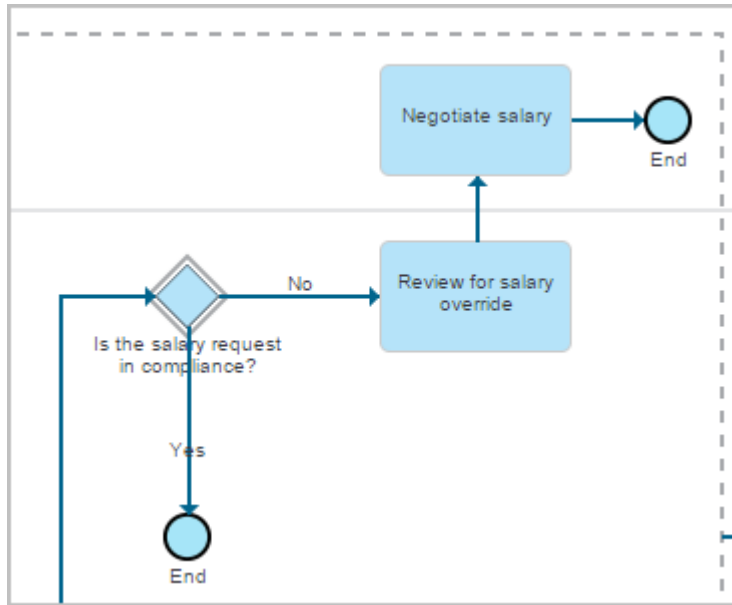
- ___ d. Click and hold the cursor on the new gateway and drag it to the left of the **Review for salary override** activity.



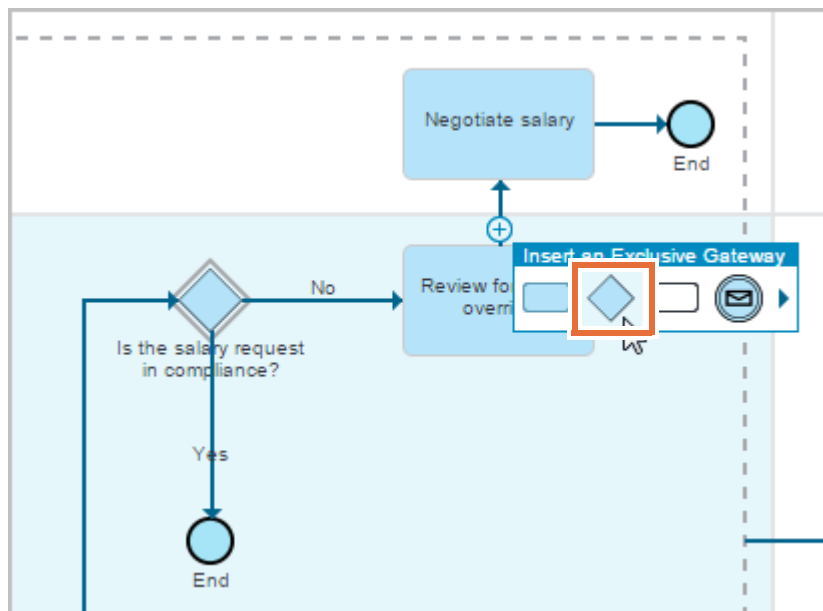
- ___ e. Click one time on the **Decision** gateway label to highlight it in blue.
- ___ f. Type in the new label for the gateway in the form of a question: Is the salary request in compliance?



- ___ g. Click the flow line with **No** label that is connected to the **End** event to highlight it in blue.
- ___ h. Type in the new label: **Yes**
- ___ i. Click the flow line with **Yes** label flow line that is connected to the **Review for salary override** to highlight it in blue.
- ___ j. Type in the new label: **No**

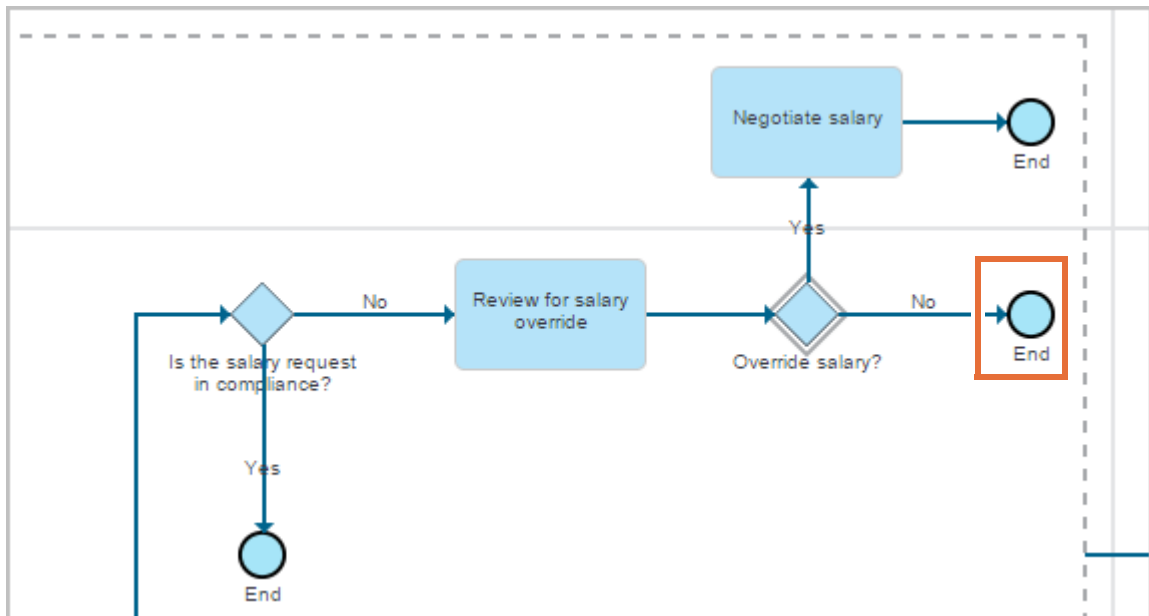


- ___ 5. Add another gateway to the process diagram.
 - ___ a. Roll over the cursor on the flow line that connects the **Review for salary override** activity to the **Negotiate salary** activity.
 - ___ b. Click the **+** circle icon on the flow line.
 - ___ c. Select the **Decision** icon to insert it in the flow line.

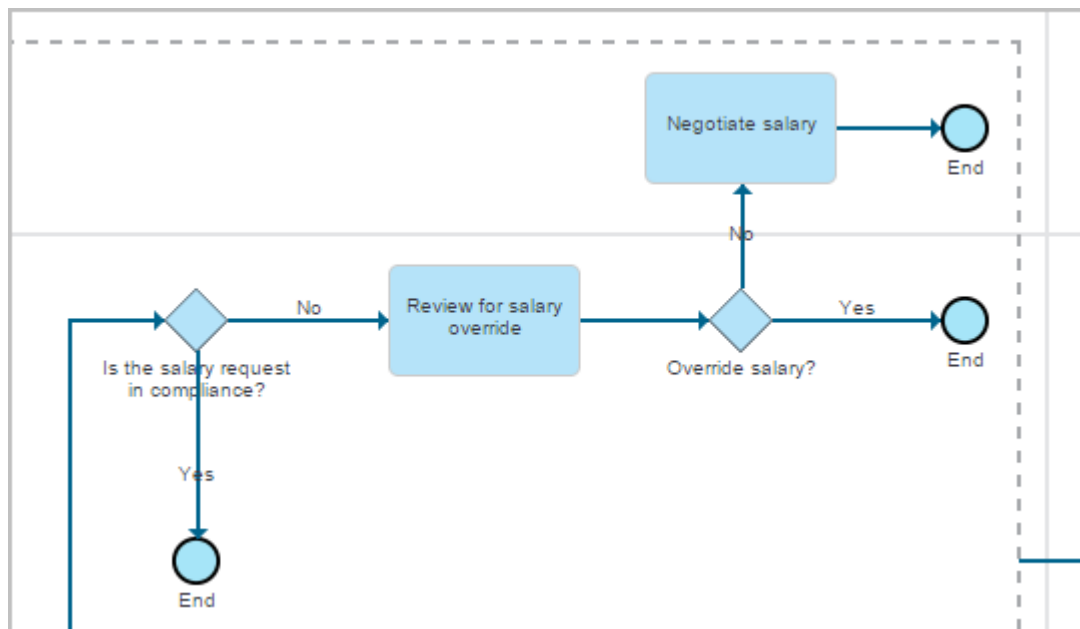


- ___ d. Click one time on the **Decision** gateway label to highlight it in blue.

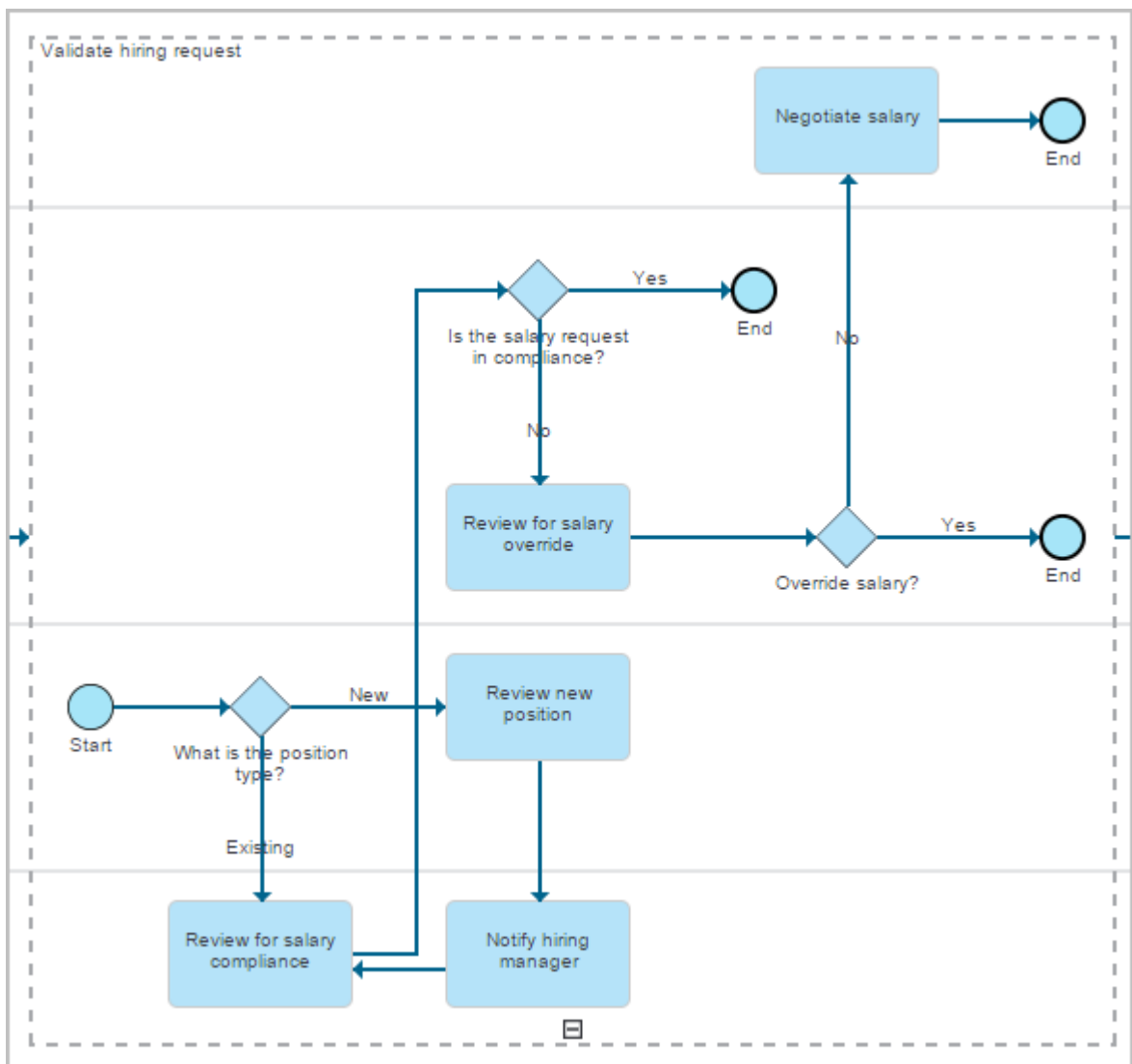
- ___ e. Type in the new label for the gateway in the form of a question: **Override salary?**
- ___ f. Click, hold, and drag the **End** event that is connected to the gateway and position it to the immediate right of the gateway.



- ___ g. Click the flow line with **No** label that is connected to the **End** event to highlight it in blue.
- ___ h. Type in the new label: **Yes**
- ___ i. Click the flow line with **Yes** label flow line that is connected to the **Negotiate salary** to highlight it in blue.
- ___ j. Type in the new label: **No**



- ___ 6. Move another flow object in the process diagram.
- ___ a. Click, hold, and drag the Yes end event to the area to the right of the gateway: **Is the salary request in compliance?**
 - ___ b. Release the mouse to place the event in the new area in the process diagram.
 - ___ c. All the gateways are added to the subprocess in the process diagram. In the modified process diagram subprocess, there are three ways to continue from the subprocess to the **Completion** phase of the process: If the request meets all compliance factors, if the HR Administrator overrides the salary request, or if the Hiring Manager renegotiates the salary request. Furthermore, the process owner informs the process author that the organization is redefining the **Negotiate salary** activity. So it would not be prudent to fully model this part of the process. Also, the General Manager review needs further clarification from the process experts later, so it is not fully modeled.



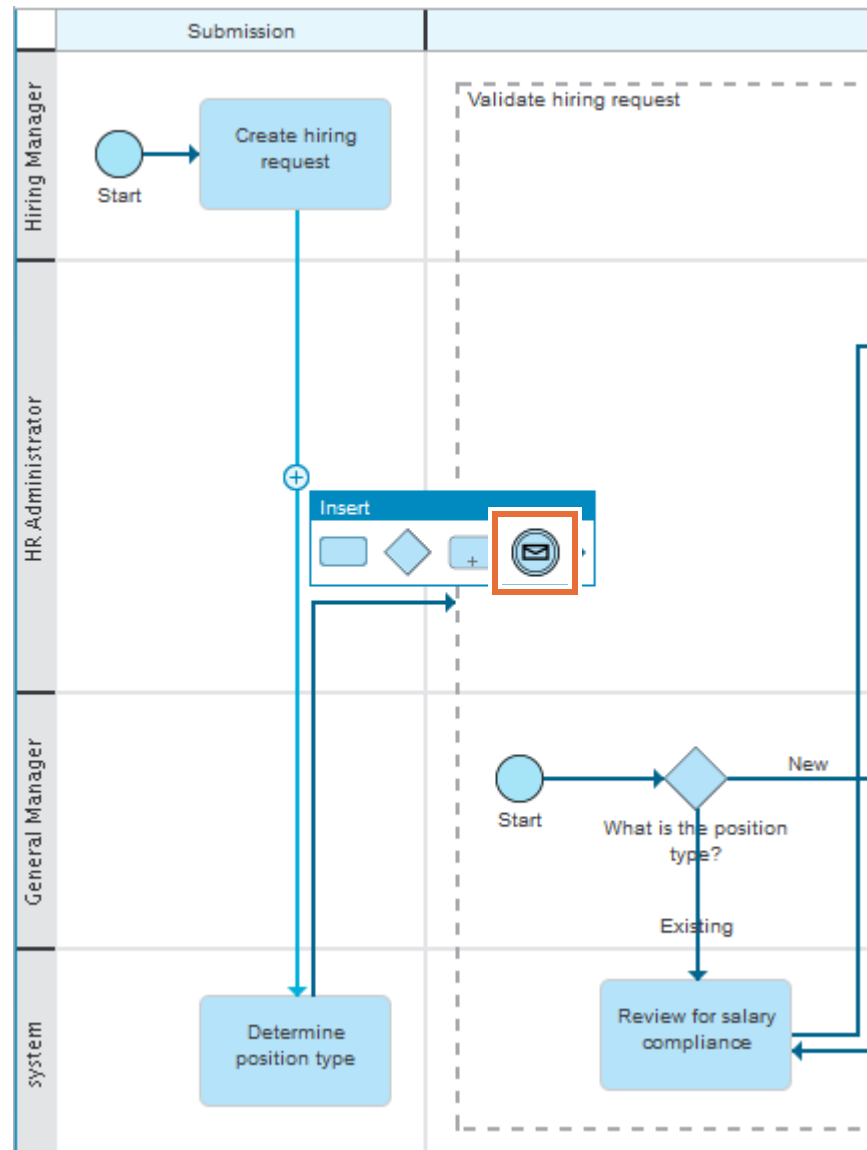


Information

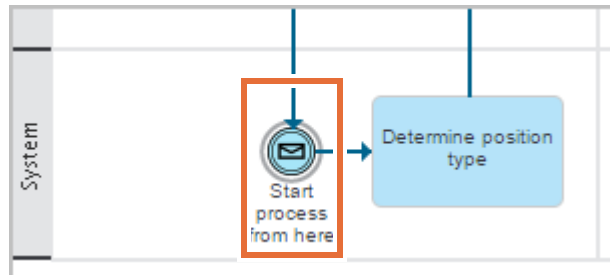
Process Owner:

“The process model looks good. Can an element or two be added in the diagram that communicates that the process can begin differently. The process begins with the submission of a request by the Hiring Manager in person or through data entry in the system.”

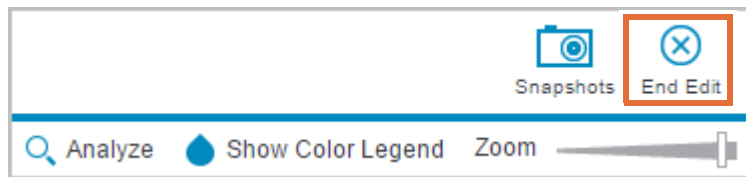
- ___ 7. Add an event to the process diagram.
 - ___ a. Roll over the cursor on the flow line that connects the **Create hiring request** activity and the **Determine position type** activity.
 - ___ b. Click the **+** circle icon to add an element to the flow line.
 - ___ c. Click the **Message** event from the menu.



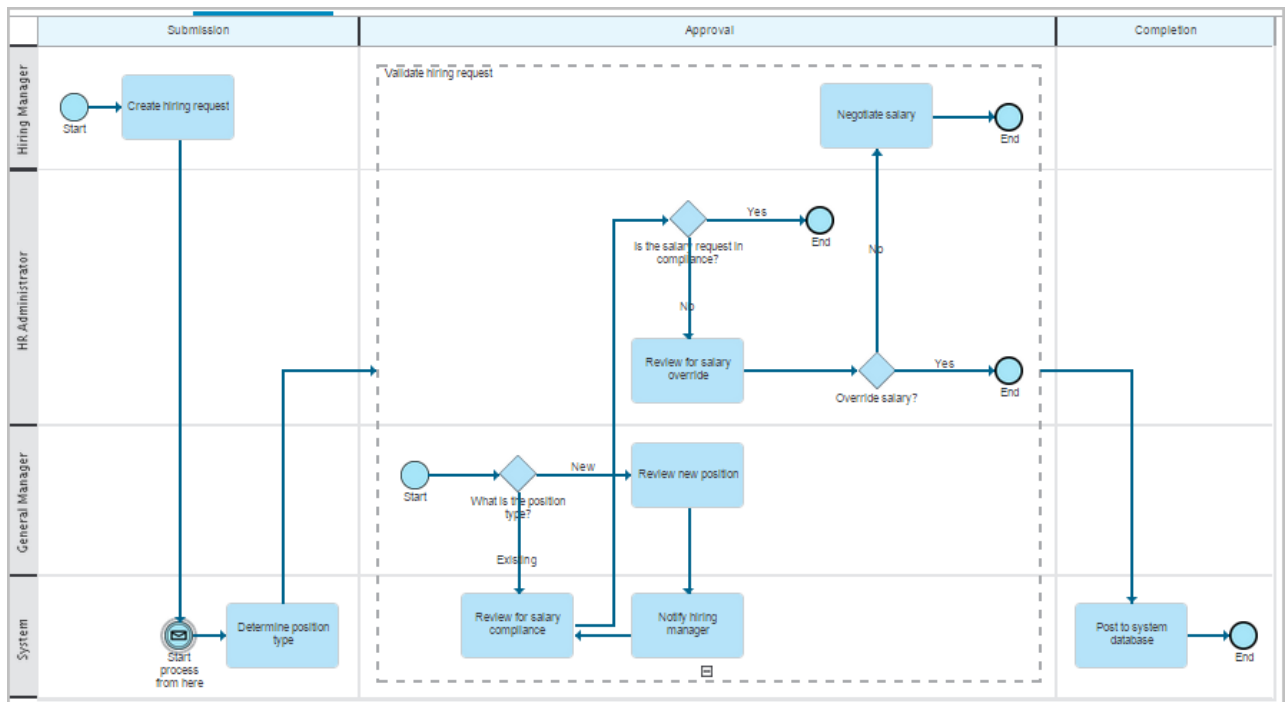
- ___ d. Click the **Message** event label to highlight it in blue.
- ___ e. Type in the new label: Start process from here
- ___ f. Click, hold, and drag the message event to the left of the **Determine position type** activity.
- ___ g. Release the mouse to place the event in the process diagram.



- ___ h. Click **End Edit** at the upper right of the process diagram interface to save to the process diagram until the interim Playback with the business stakeholder is conducted.



This section completes this phase in the descriptive modeling effort to develop the initial “as is” process diagram of the Hiring Requisition process. The process owner is satisfied with this model and takes a snapshot to have a historical reference point in case it is needed for revert purposes.



Part 3: Examine decision task with decision discovery



Information

Process owner:

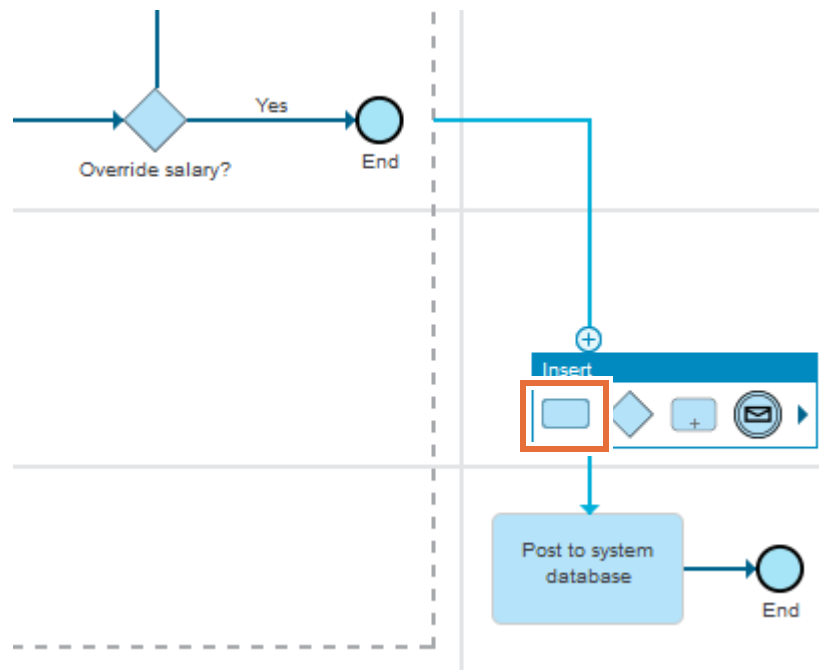
“During the Completion phase of the Hiring Requisition process, the HR Administrator reviews and determine the compensation package.”

You can use IBM Blueworks Live to discover and document the decisions within business processes. Decisions can be modeled graphically, enabling users to compose, view, and collaborate on decision diagrams. Key characteristics of decisions can be captured, and the decision logic that is documented by using decisions tables. Changes to decisions can be tracked and previous versions of decisions restored. Decisions of interest can be easily located, along with the business processes that are using those decisions. You can share decision documentation by printing decision diagrams, exporting decision information to MS Word and MS Excel, and sharing links to decisions.

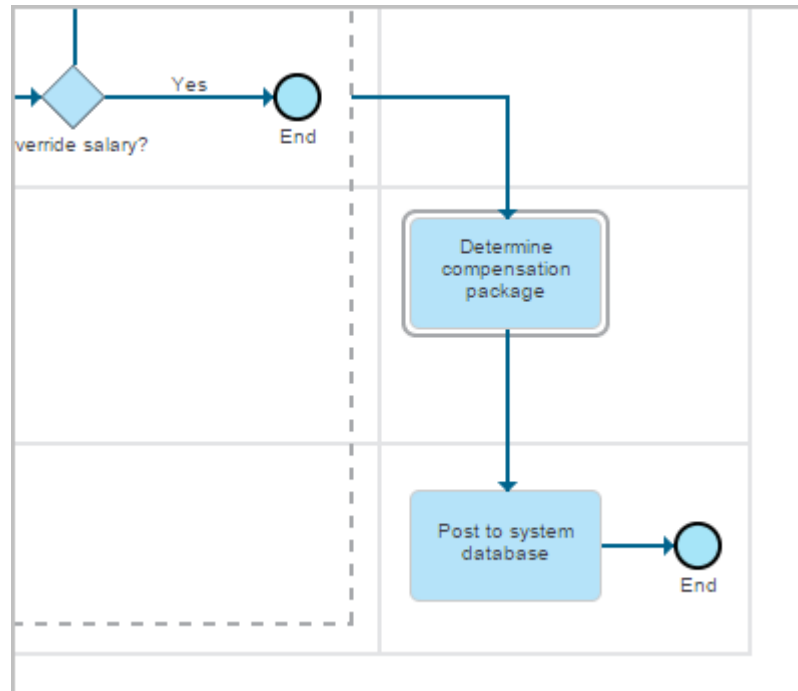
In this part of the exercise, you examine the decision discovery that uses the example, Establish a compensation package, which is provided with the tool.

___ 1. Add a decision task.

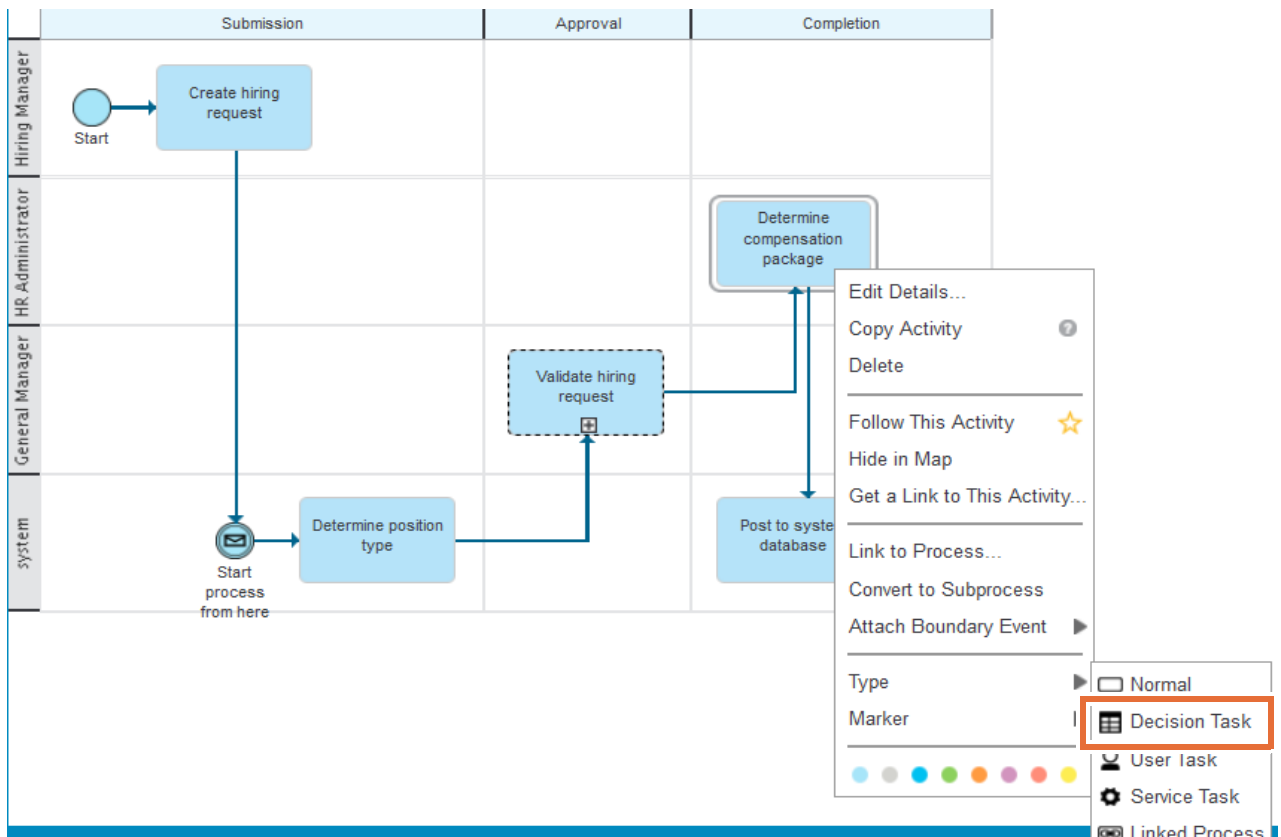
___ a. Add an activity between the subprocess and the **Post to system database** activity on the process diagram.



- ___ b. Name the new task: Determine compensation package

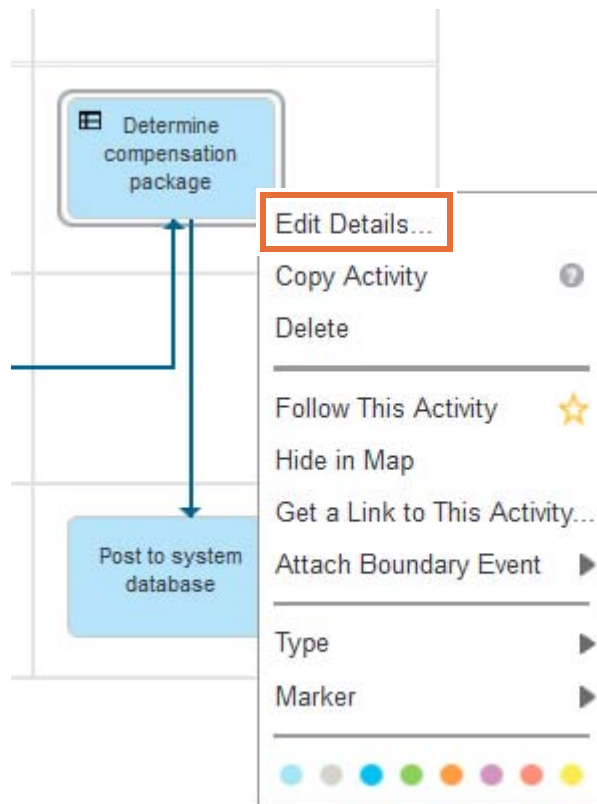


- ___ c. Move the **Determine compensation package** activity from the **General Manager** lane to the **HR Administrator** lane.
- ___ d. Right-click the **Determine compensation package** activity, and click **Type > Decision Task**.

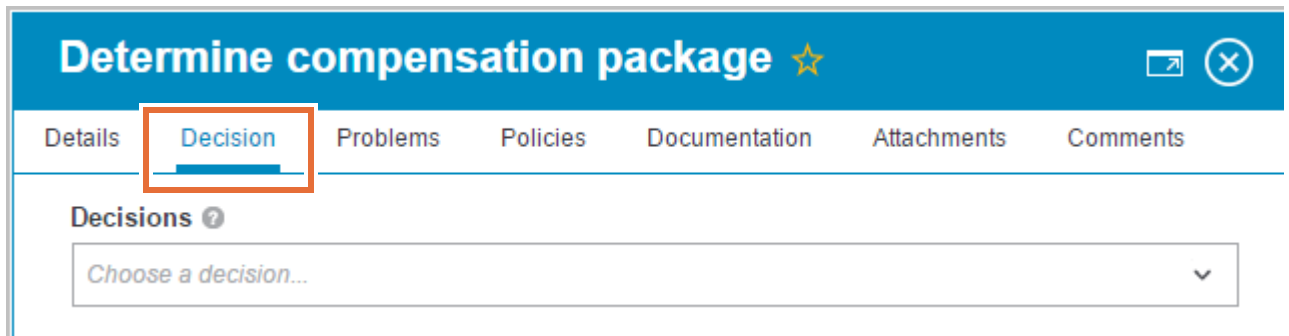


___ 2. Add a decision.

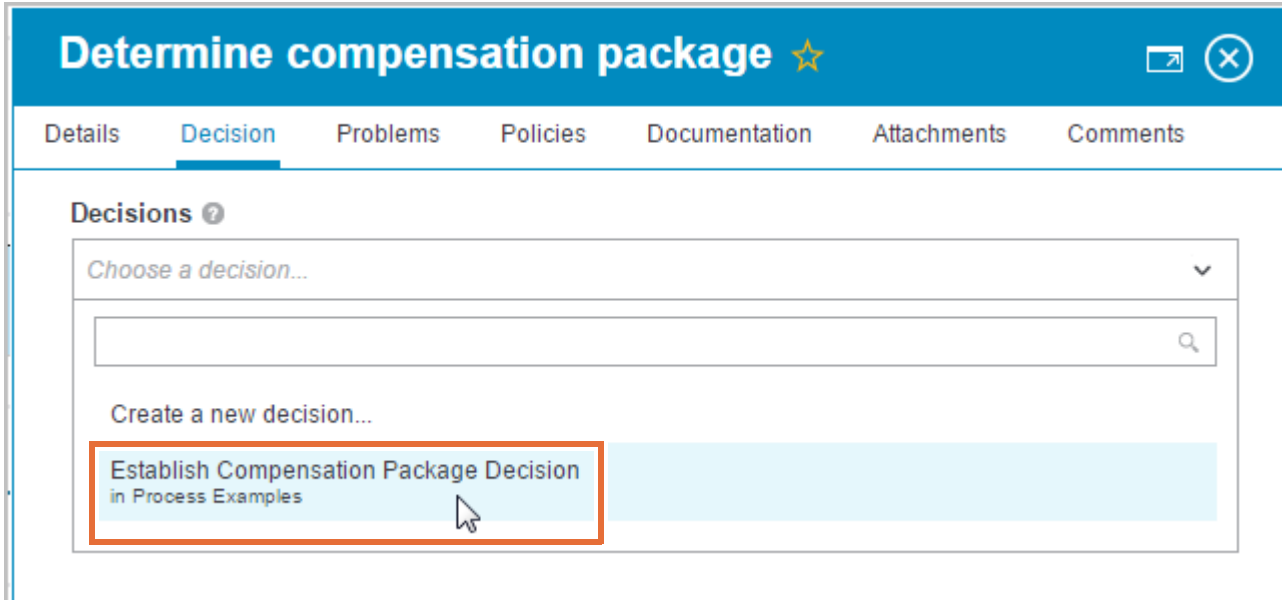
- ___ a. Right-click the **Determine compensation package** decision task, and click **Edit Details**.



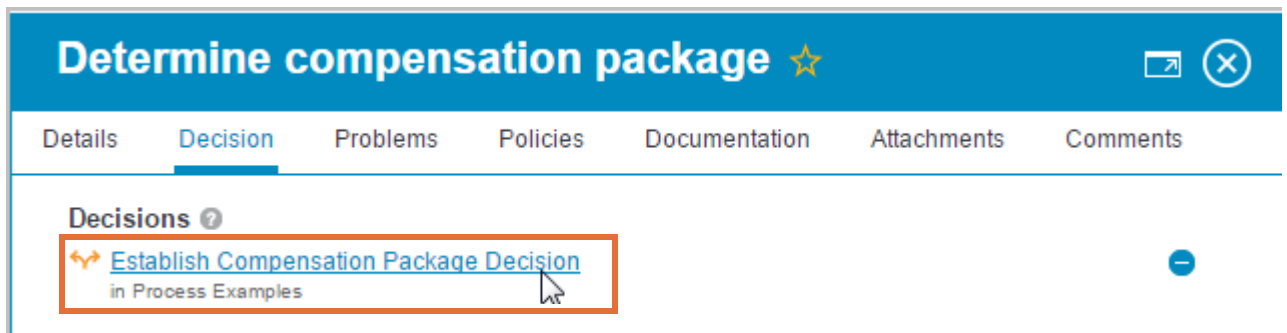
- ___ b. Click **Decision**.



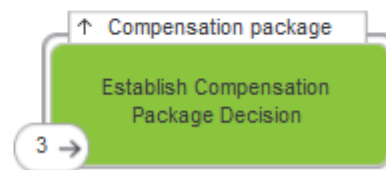
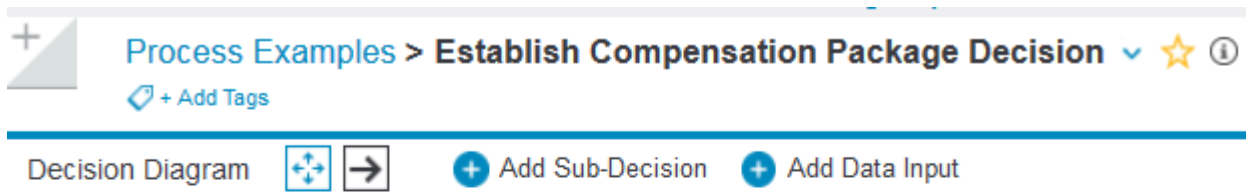
- ___ c. Click **Choose a decision**, and select **Establish Compensation Package Decision**.



- ___ d. Click the **Establish Compensation Package Decision** link to open the decision diagram.



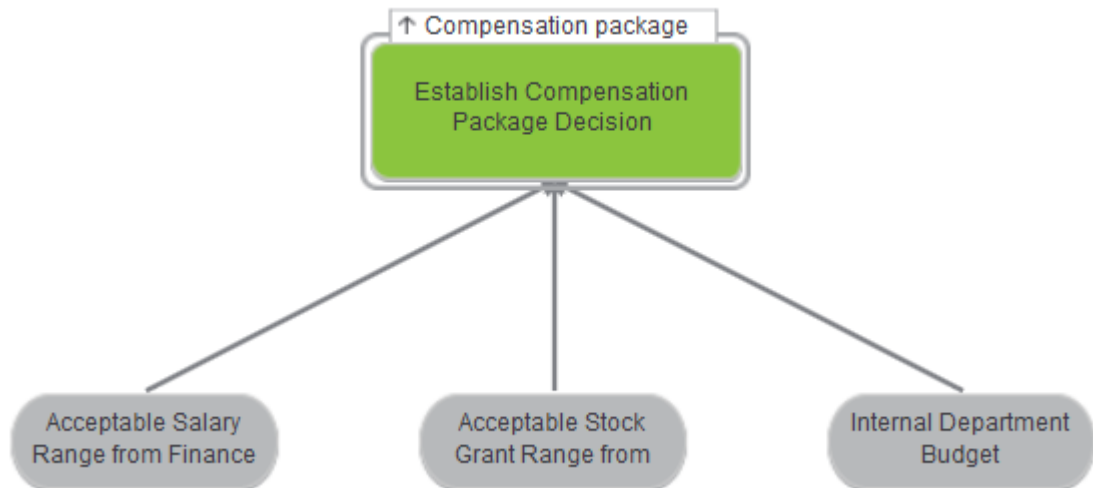
- ___ e. The Decision Diagram of **Establish Compensation Package Decision** opens.



- ___ f. Click **Show Data Inputs** to expand the diagram.

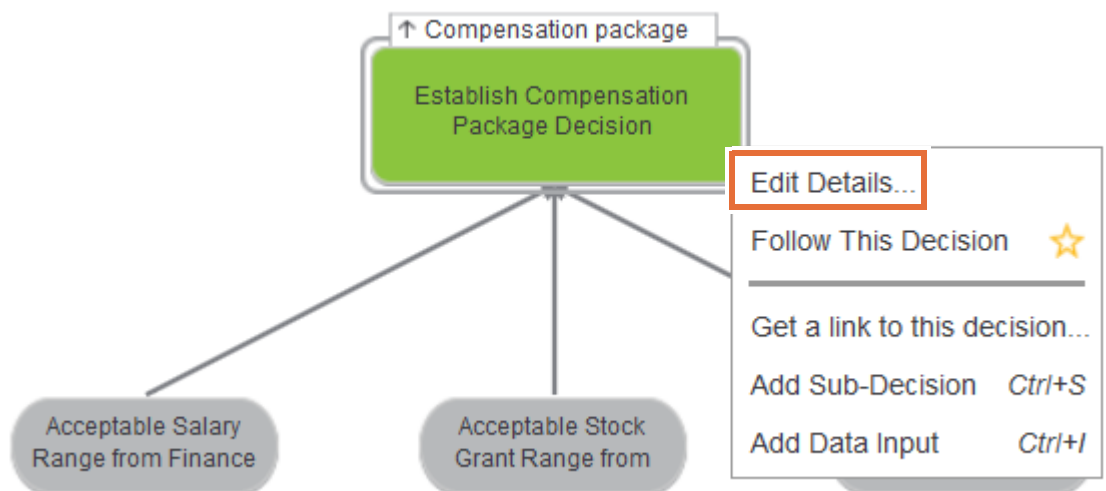


The Decision Diagram expands.



- ___ 3. Examine the decision details.

- ___ a. Right-click the **Establish compensation Package Decision** in the decision diagram, and click **Edit Details**.



___ b. Click **Decision**.

Establish Compensation Package Decision ☆

Details **Decision** Policies Attachments Documentation Comments

▼ **Business Motivation** ?

ⓘ

▼ **Business Owners** ?

ⓘ ☆ + -

___ c. Examine the Decision details.

- **Decision Description:** To summarize the business decision, including key business rules and relevant policies
- **Inputs and Output:** To list both the inputs and outputs that were defined in the decision diagram

Details **Decision** Policies Attachments Documentation Comments

▼ **Decision Description** ?

Click to Edit Description

▼ **Inputs and Output** ?

Inputs

➔ Acceptable Salary Range fro...

➔ Acceptable Stock Grant Ran...

➔ Internal Department Budget

Output

⬆ Compensation package

- **Decision Table:** To capture the details of the decision, where each row represents the conclusion (outcome) of a unique set of considerations (inputs)

▼ **Decision Table** ?

Establish Compensation Package Decision

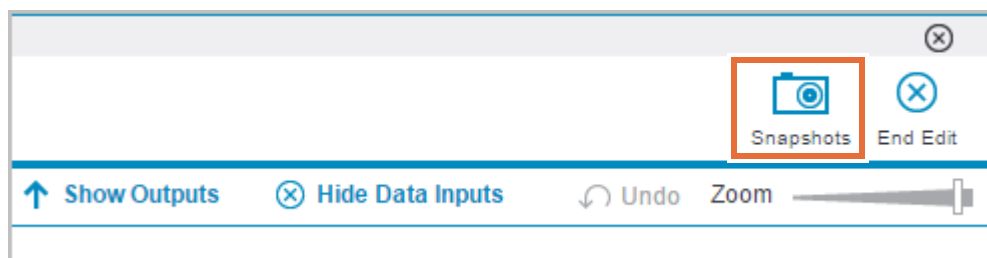
Considerations			Conclusions
Acceptable Salary Range from Finance	Acceptable Stock Grant Range from Finance	Internal Department Budget	Compensation package
		< Acceptable Salary Range from Finance	minimum salary in finance range, no stock grant
\$51k - \$75k	< 1000 shares	>\$50k	manager discretion within finance range
\$76k - \$100k	< 2000 shares	>\$76k	\$50k, no stock grant
> \$100k			requires executive approval
	> 2000 shares		requires executive approval

- **Exception Table:** To list any exception consideration and its conclusion, if applicable

Exception Table 1

Considerations	Conclusions
Is Executive?	Compensation package
Yes	Compensation approved by board of directors

- ___ d. Click **X** to close the Details window.
- ___ 4. Create a snapshot.
- ___ a. Click the **Snapshots** icon in the upper right.



- ___ b. Enter Initial Snapshot and press Enter.

▼ ★ ⓘ

Snapshots End Edit

Add a Snapshot ⓘ

Type a description and press 'Enter' to create a snapshot. Press 'Esc' or click away to cancel.

Initial Snapshot

☒ Hide System Snapshots

Today	
Current Version	Current Version
Current User	Actions
Initial Snapshot	Now
	Actions

- ___ c. Click **End Edit** to return to view mode.

on

▼ ★ ⓘ

Snapshots End Edit

Snapshots ⓘ

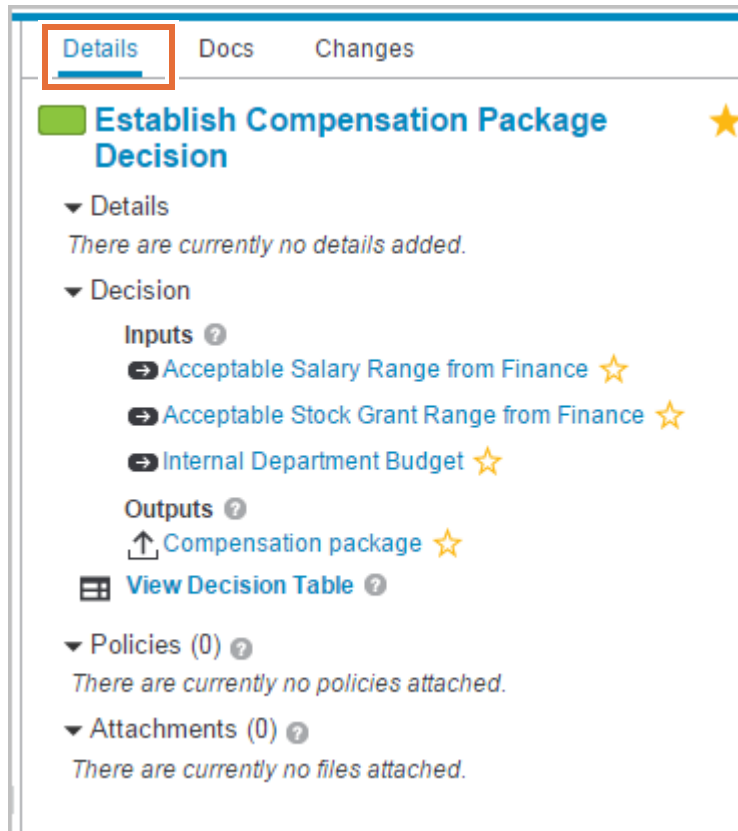
Type a description and press 'Enter' to create a snapshot. Press 'Esc' or click away to cancel.

Snapshot

☐ Hide System Snapshots

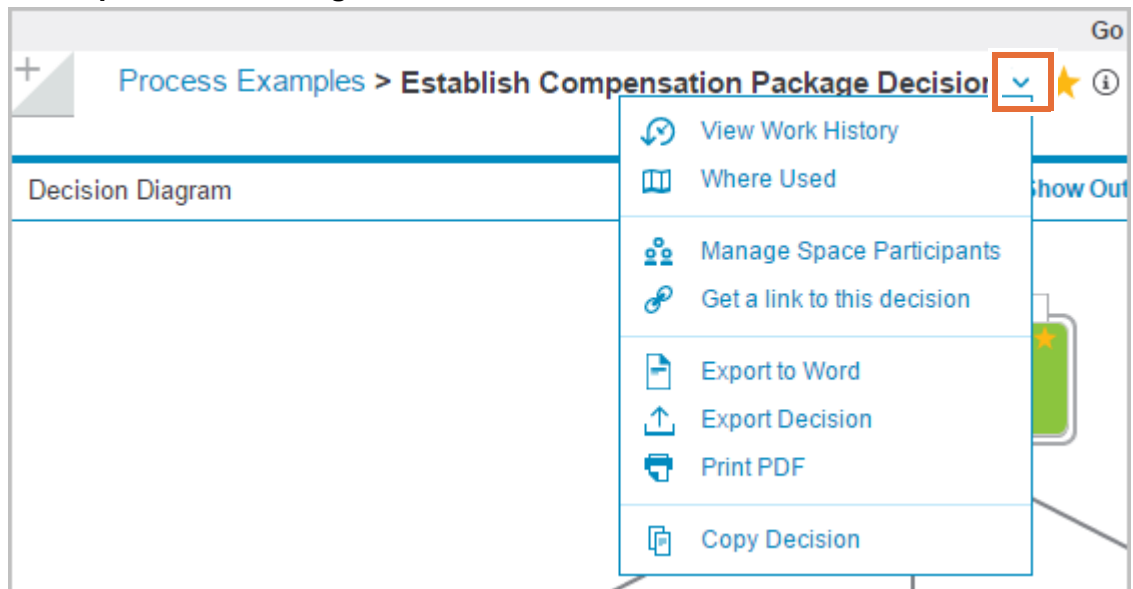
Today	
Current Version	Current Version
Current User	Actions
Initial Snapshot	Now
	Actions

- ___ 5. Examine the details, documentation, and changes.
- ___ a. Click **Details** in the right pane to view the details information about the decision.

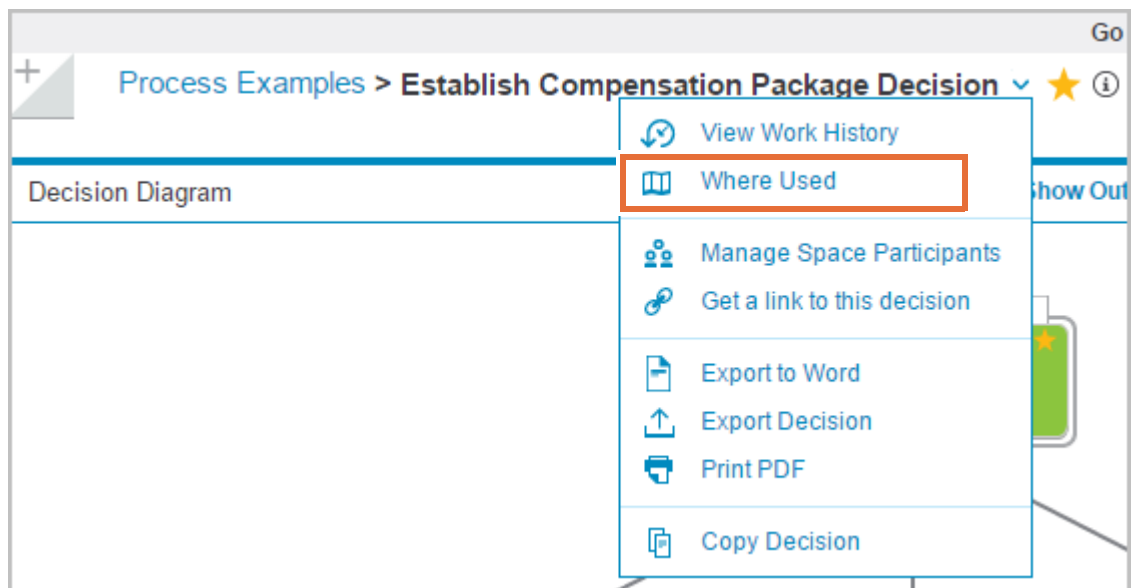


- ___ b. Click **Docs** to view the documentation of the decision.
- ___ c. Click **Changes** to view the change history of the decision.

- ___ 6. Examine the Where Used feature.
- ___ a. To find out where the **Establish compensation Package Decision** is used in the process, click the pull-down menu from the **Process Examples > Establish compensation Package Decision**.



- ___ b. Click **Where Used** from the menu.

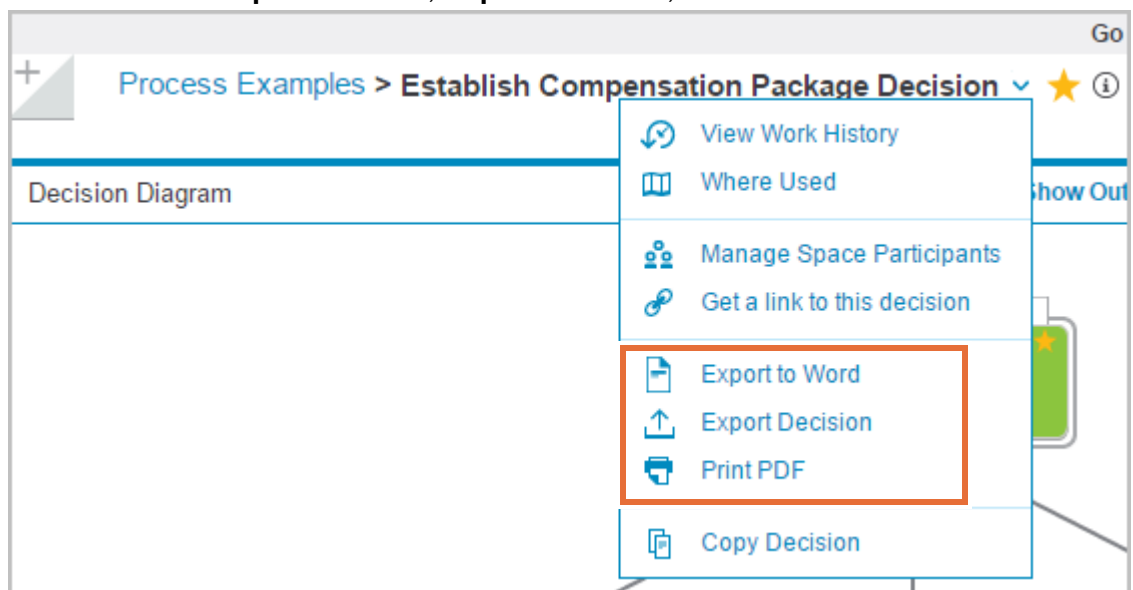


- ___ c. It shows the two processes where the **Establish compensation Package Decision** is used.

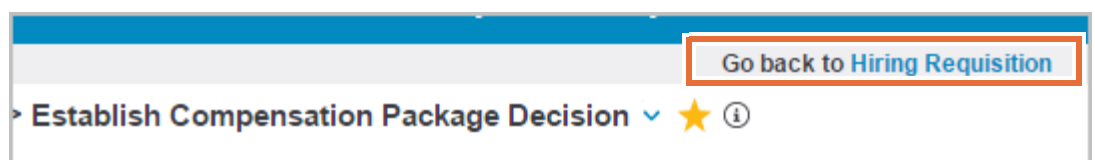
Where Used: Establish Compensation Package Decision

Spaces (2)	Processes (2)	Activities (2)
Hiring - Onboarding <small>Last modified on 04-Mar-2016</small>	<div style="border: 1px solid #0070C0; padding: 5px; margin-bottom: 10px;"> Process Examples </div> <div style="border: 1px solid #0070C0; padding: 5px;"> Training Space </div>	

- ___ d. You can also click **Spaces** and **Activities** links to see where else it is used.
- ___ 7. Examine the export and printing feature.
- ___ a. To export or print the **Establish compensation Package Decision**, click the pull-down menu from the **Process Examples > Establish compensation Package Decision**.
- ___ b. You can click **Export to Word**, **Export Decision**, or **Print PDF** from the menu.



- ___ c. Choose any of the three options, and examine the details of the word document, or PDF file.
- ___ d. Close the files when you are done.
- ___ e. Click **Hiring Requisition** to return to the process diagram.



End of exercise

Exercise review and wrap-up

The first part of this exercise was the creation of a process diagram from the discovery map. In the new process diagram, the System lane was moved to an appropriate place in the diagram. The General Manager lane in the subprocess was moved to stack on top of the System lane. In the subprocess, three gateways were added based on the requirements from the process narrative. Process flow objects were moved to refine the process diagram to clearly communicate process flow. An event type was added to reflect the different method that the process is started.

Exercise 5. Conducting a Playback of the process diagram in IBM Blueworks Live

Estimated time

00:30

Overview

In this exercise, you conduct a Playback of the two process paths within the process diagram to prepare to meet with the business stakeholders for a Playback review.

Objectives

After completing this exercise, you should be able to:

- Conduct a Playback of the process diagram with business stakeholders in IBM Blueworks Live

Introduction

A Playback in the descriptive modeling effort is important to validate development of the “as is” process model. BPM development teams decide how many Playbacks to conduct within each phase of modeling. Each phase is a theme for development, such as descriptive model verification, alternative path check, or process detail validation.

Requirements

This exercise requires an active IBM Blueworks Live account. If an account does not exist for the student, then a 30-day trial account can be provisioned when the student signs up for one.

Exercise instructions

Preface

- To accomplish completing this exercise, the student must have an active Blueworks Live account.

Part 1: Create the Playback paths to validate in the Playback session



Note

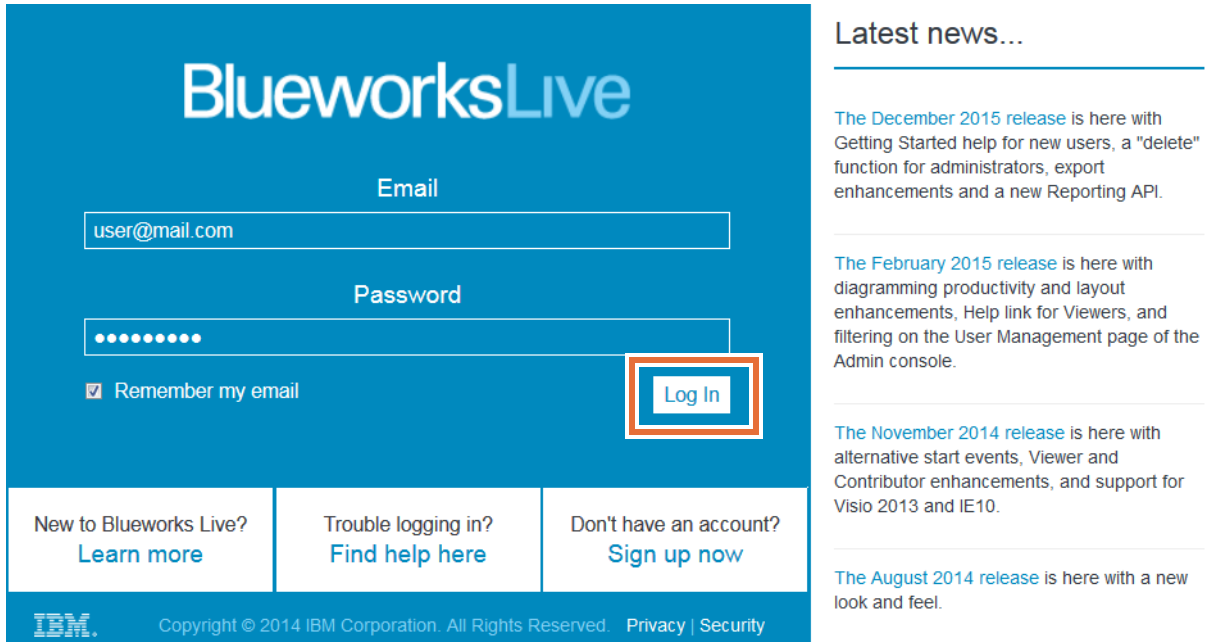
If you are already in Blueworks Live and are in the discovery map for the Hiring Requisition, skip step 1 and 2, and proceed immediately to step 3 in this section.

- ___ 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 in the **Email** field.
- ___ d. Enter the account password in the **Password** field.

___ e. Click **Log In**.



The image shows the BlueworksLive login page. It has a blue header with the 'BlueworksLive' logo. Below the logo are input fields for 'Email' (containing 'user@mail.com') and 'Password' (masked with dots). There is a 'Remember my email' checkbox and a 'Log In' button, which is highlighted with a red rectangle. At the bottom, there are three links: 'New to Blueworks Live? Learn more', 'Trouble logging in? Find help here', and 'Don't have an account? Sign up now'. On the right side, there is a 'Latest news...' section with three news items about releases from December 2015, February 2015, and November 2014. The footer includes the IBM logo and copyright information for 2014.

BlueworksLive

Email

user@mail.com

Password

.....

☒ Remember my email

Log In

New to Blueworks Live?
Learn more

Trouble logging in?
Find help here

Don't have an account?
Sign up now

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Latest news...

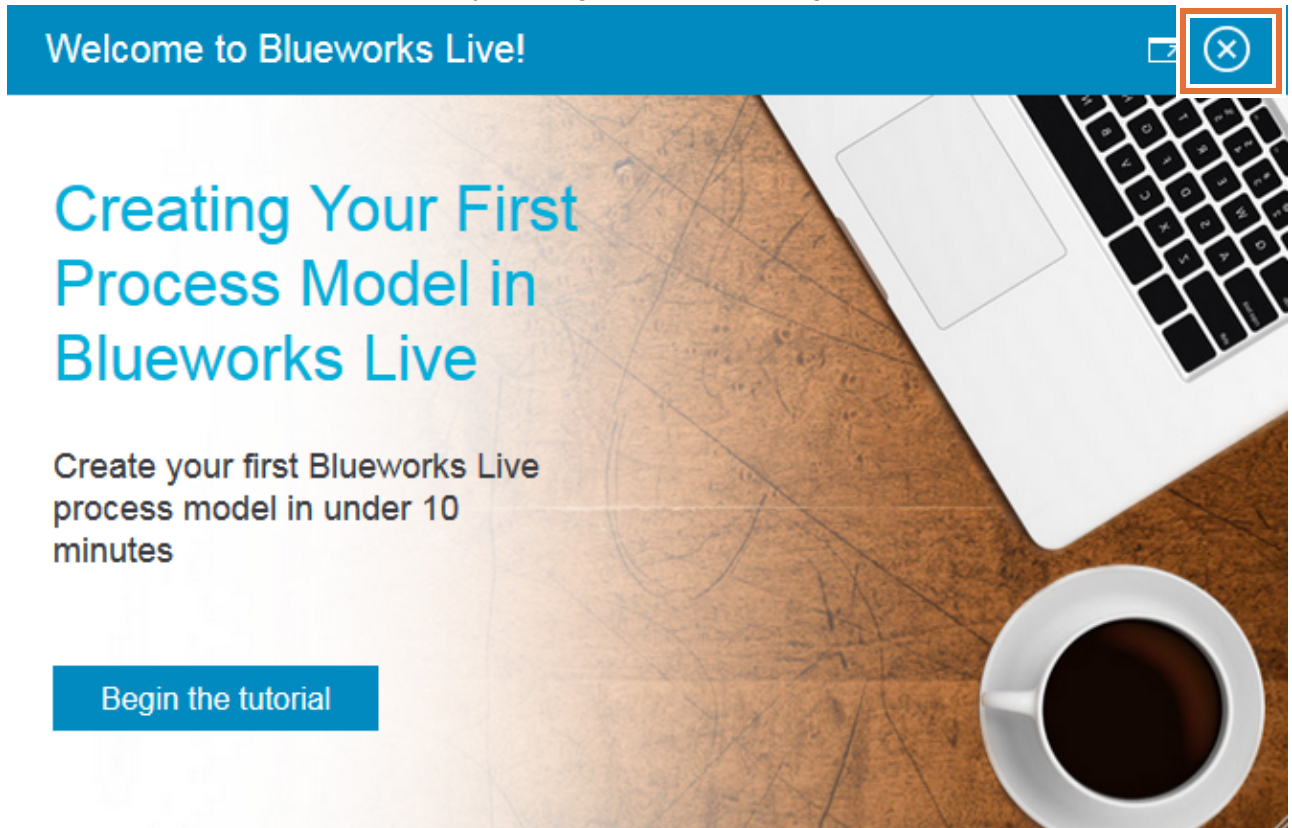
The December 2015 release is here with Getting Started help for new users, a "delete" function for administrators, export enhancements and a new Reporting API.

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

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

The August 2014 release is here with a new look and feel.

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



___ 3. Access the blueprint process.

___ a. Click the **Library** tab, click the **Processes** link.



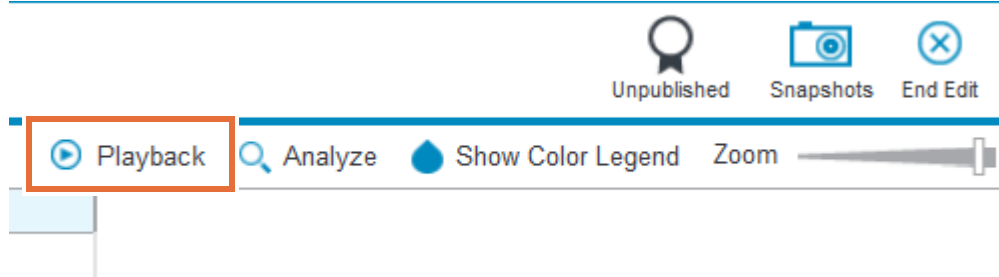
___ b. Click the Hiring Requisition link.



___ c. Verify that the Hiring Requisition blueprint process discovery map is now available and in the Edit mode.

___ 4. Start Playback mode for Hiring Requisition.

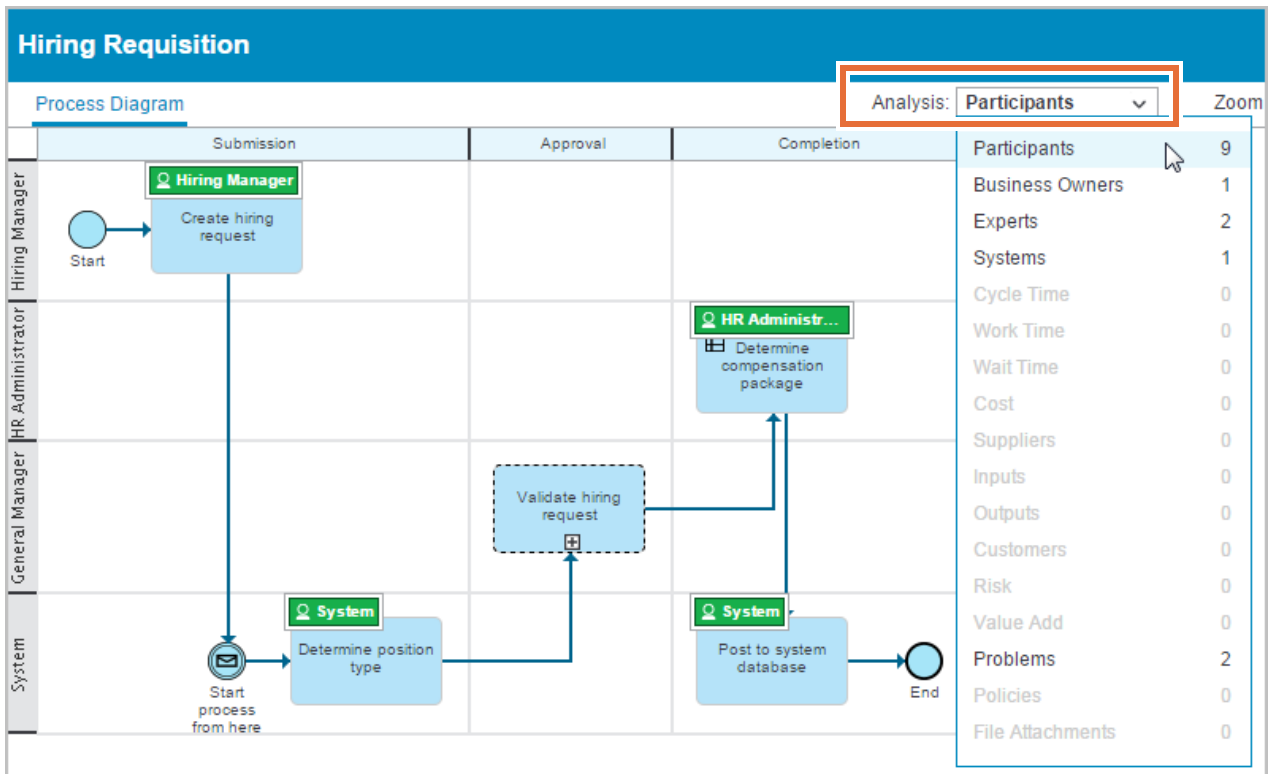
___ a. Click the **Playback** icon for the **Hiring Requisition** blueprint process.



Note

You can start the **Playback** mode of the process from either the **Edit** or **End Edit** mode.

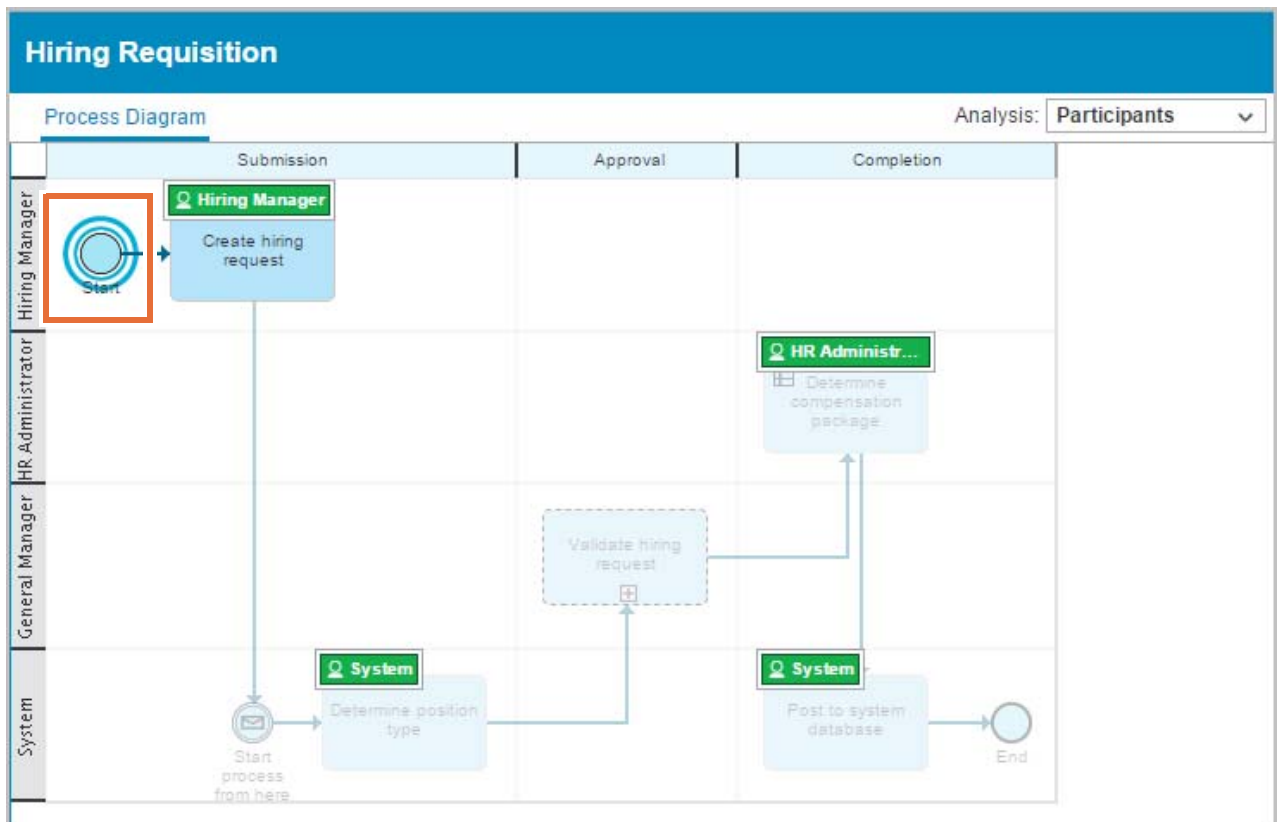
- ___ b. Click the **Analysis** menu to view the different labels that can be applied to the Playback of the process diagram. Leave the default **Participants** analysis in view for this Playback. The number next to the label indicates the number of the existing labels.



- ___ 5. Create the first Playback name and path.
- ___ a. Click in the **Playback 1 Name** entry box.
- ___ b. Type in the text: New position salary compliant path

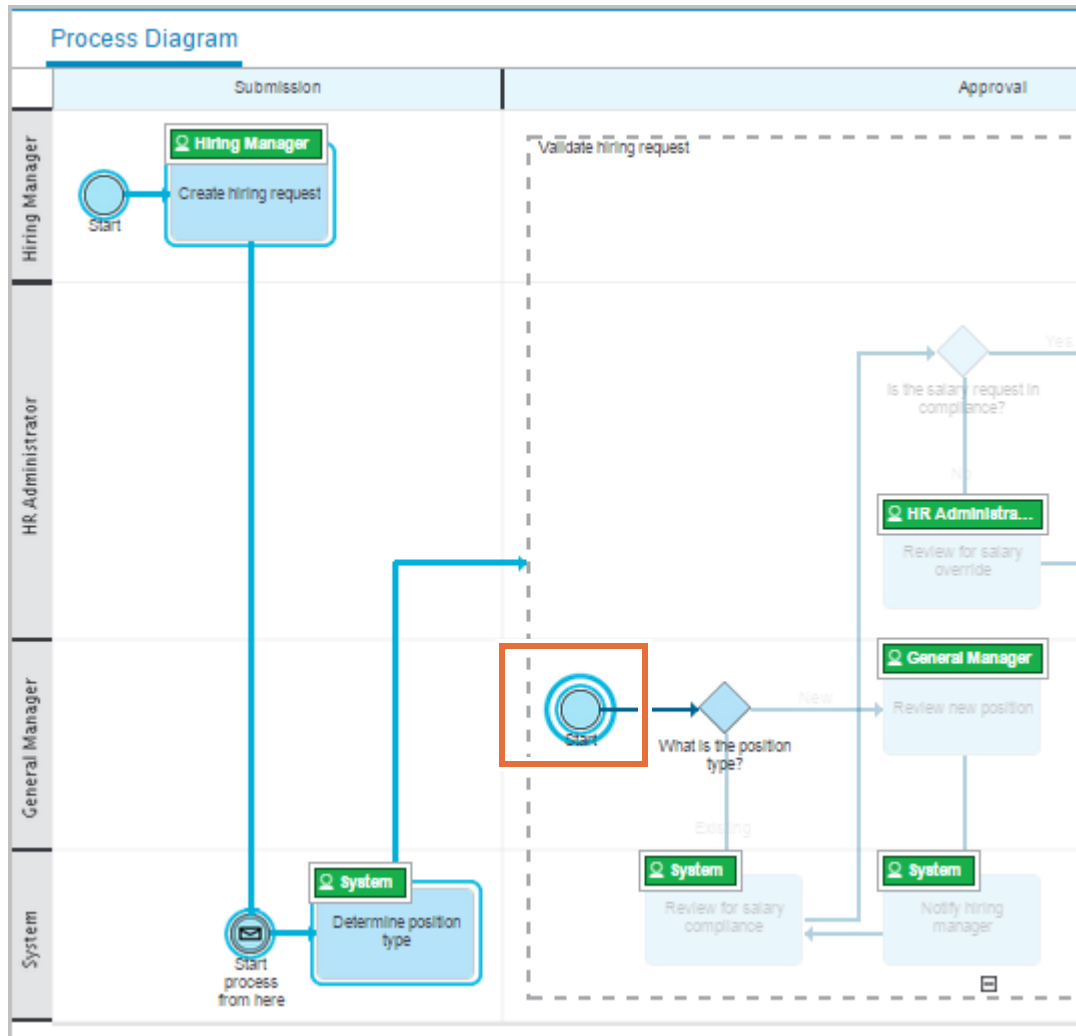
The screenshot shows the 'Playback 1 Name' entry box with the text 'New position salary compliant path' entered. Below the entry box is a message: 'Start creating a playback by selecting any object in the diagram as your starting point.' At the bottom, there is a row of numbered buttons (1 through 6) and a row of navigation buttons (Play, Previous, Next, Exit).

- ___ c. Now it is time to create the Playback path. Click the **Start** event in the **Hiring Manager** lane. The icon now has a green glow to signify it is chosen as part of this Playback.

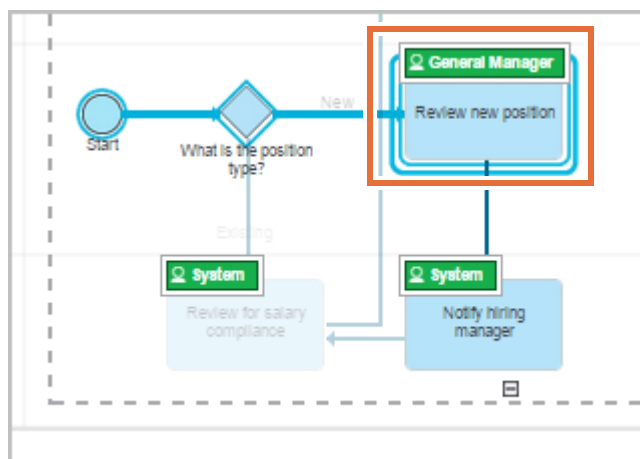


- ___ d. Click the **Create hiring request** activity.
- ___ e. Click the **Start process from here** message event. Notice that the path is being marked with a bold blue line as you continue to click the flow and object elements in the process diagram.
- ___ f. Click the **Determine position type** activity.
- ___ g. If the **Validate hiring request** subprocess is collapsed, click the **+** sign to expand it.

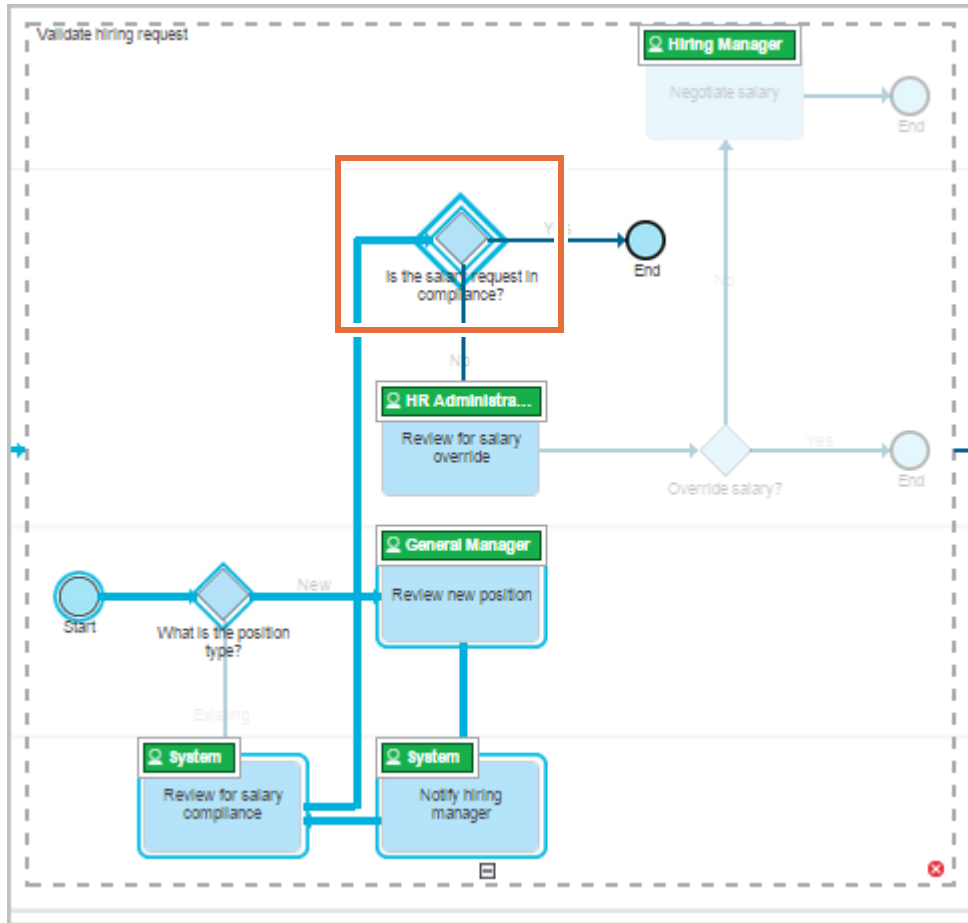
- ___ h. Now the path is at the **Validate hiring request** subprocess. Click the **Start** event for the subprocess.



- ___ i. Click the gateway: **What is the position type?**
- ___ j. Since this path is a new position that is compliant Playback, click the **Review new position** activity. The General Manager conducts the review, as shown in the participant label on the activity.

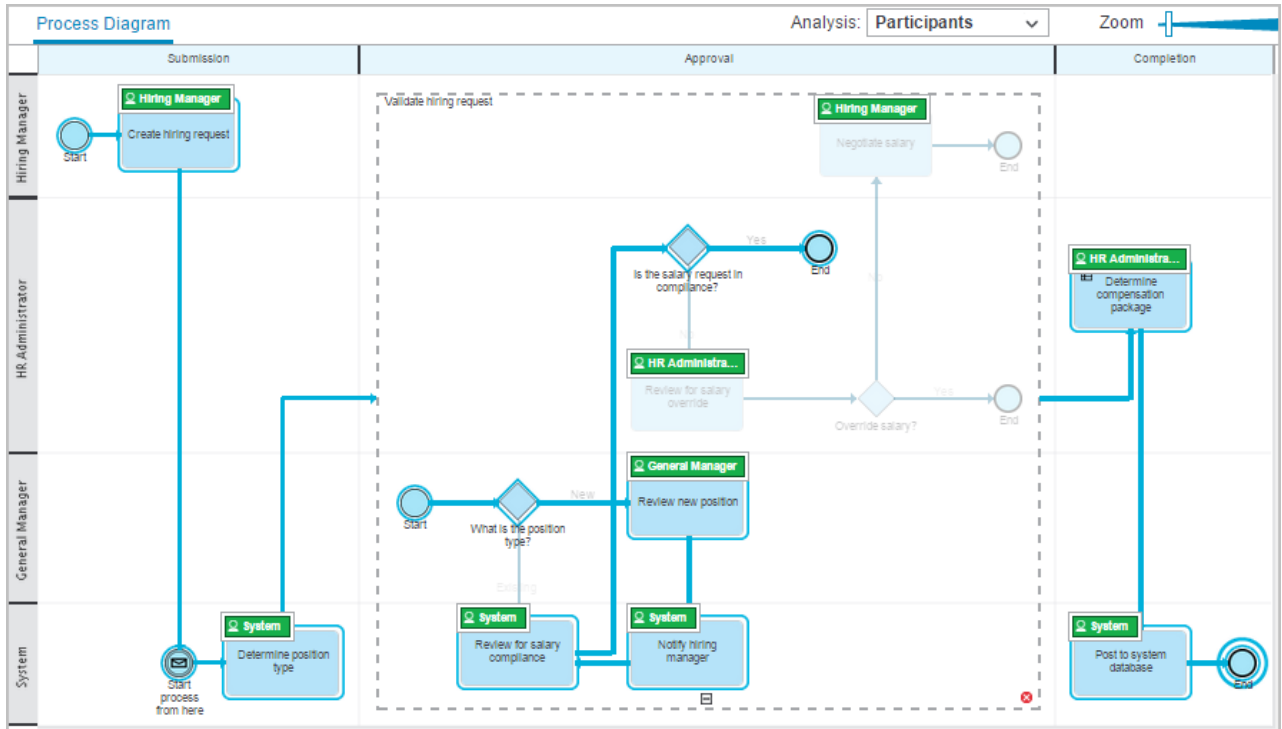


- ___ k. Click the **Notify hiring manager** activity.
- ___ l. Click the **Review for salary compliance** activity.
- ___ m. Click the gateway: **Is the salary request in compliance?** There are two process paths: compliant and non-compliant.



- ___ n. Click the **End** event.
- ___ o. Click the **Determine compensation package** activity.
- ___ p. Click the **Post to system database** activity.

- ___ q. Click the **End** event to complete the first Playback path.



Information

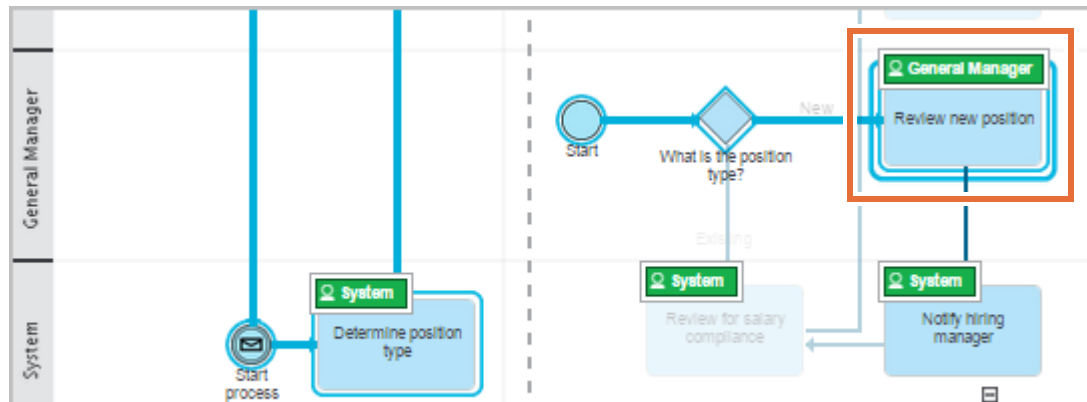
Process owner:

“This Playback session is the initial session and the group would like to limit the validation to only the new position request. The existing position backfill path can be played back later.”

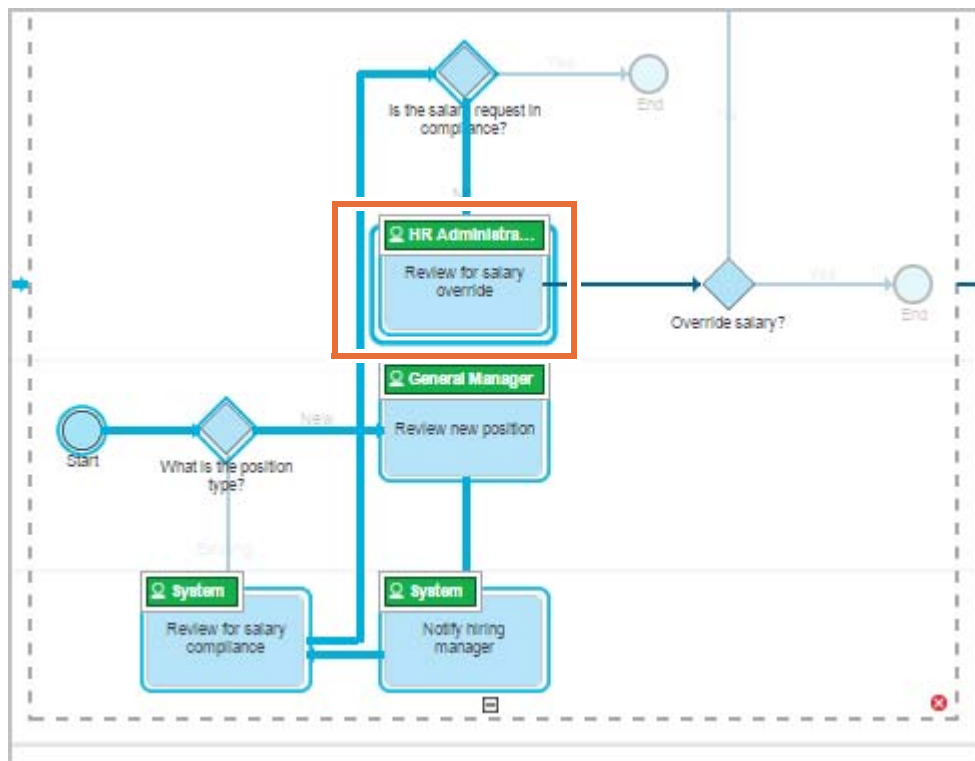
- ___ 6. Create the second Playback name and path.
- ___ a. Click the **2** icon to create a process Playback path.

- ___ b. Click the **Playback 2 Name** entry box.
- ___ c. Type in the text: New position non-compliant with an override.
- ___ d. Click the **Start** event for the process in the Hiring Manager lane.

- ___ e. Click the **Create hiring request** activity.
- ___ f. Click the **Start process from here** event.
- ___ g. Click the **Determine position type** activity.
- ___ h. In the **Validate hiring request** subprocess, click the **Start** event.
- ___ i. Click the gateway: **What is the position type?**
- ___ j. Click the **Review new position** to follow a new position path.

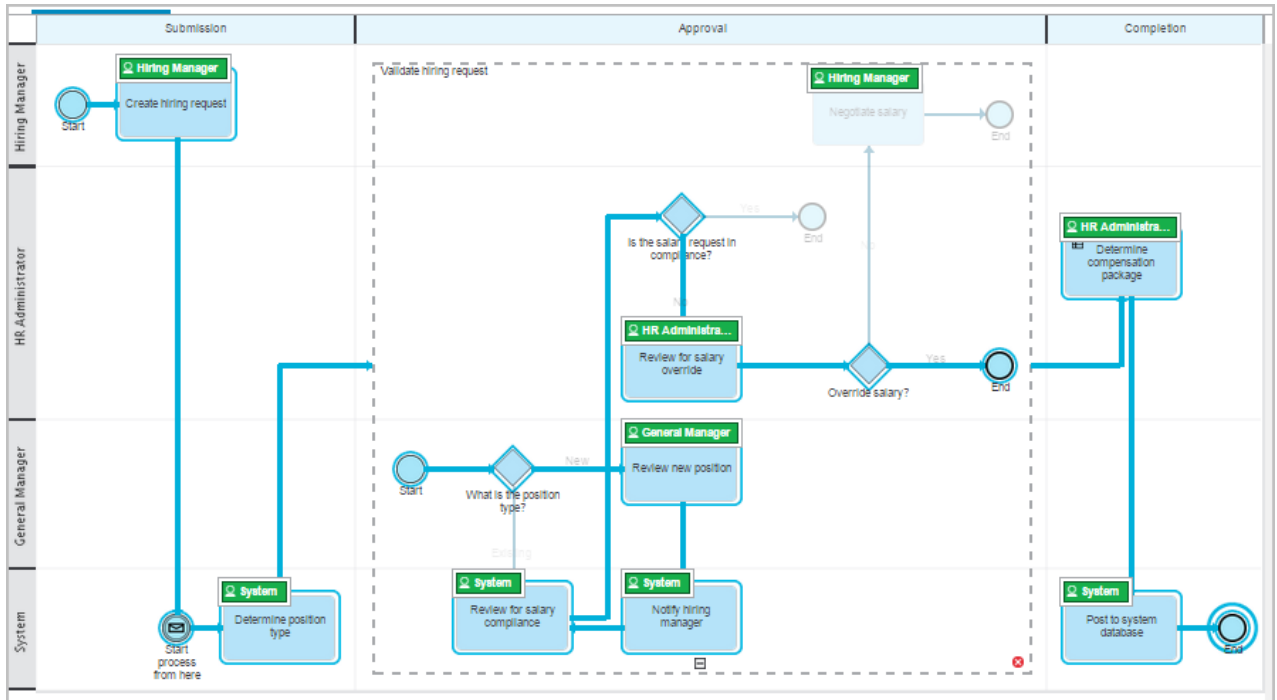


- ___ k. Click the **Notify hiring manager** activity.
- ___ l. Click the **Review for salary compliance** activity.
- ___ m. Click the gateway: **Is the salary request in compliance?**
- ___ n. Because this path is a non-compliant salary request, click the **Review for salary override** activity.



- ___ o. Click the gateway: **Override salary?**

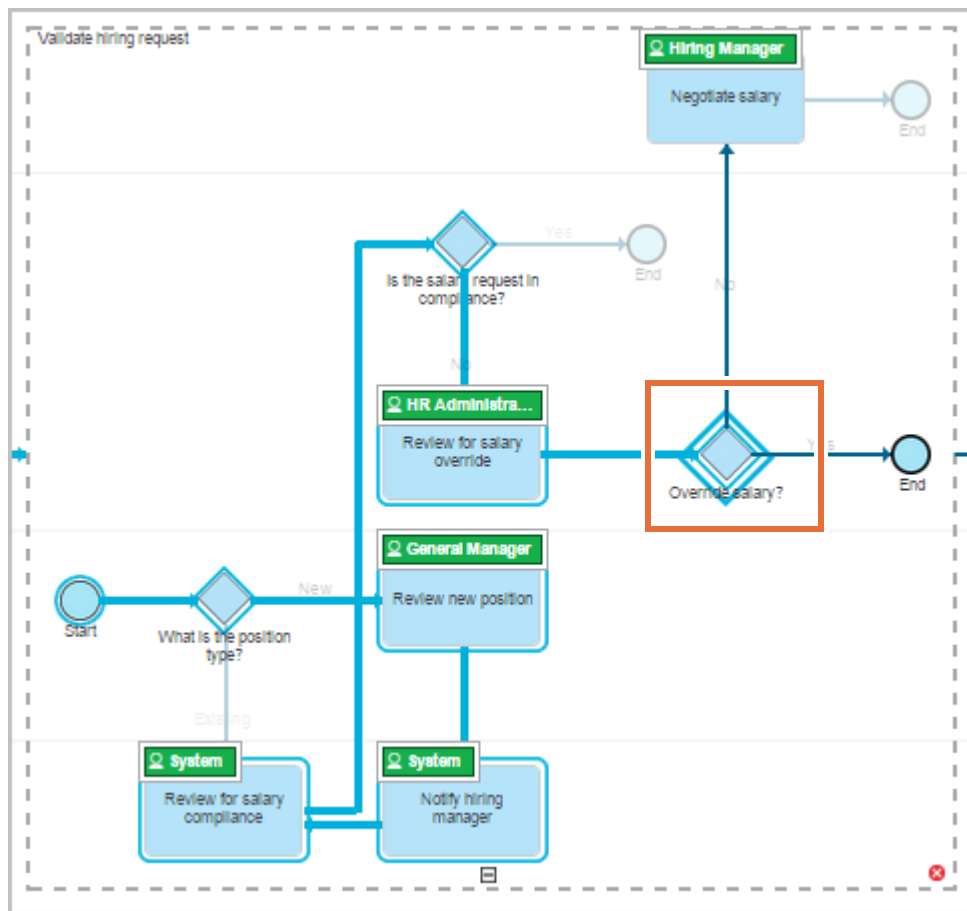
- ___ p. Because there is an override by the HR Administrator of the salary request and an adjustment is made, click the **End** event for the gateway.
- ___ q. Click the **Determine compensation package** activity.
- ___ r. Click the **Post to system database** activity.
- ___ s. Click the **End** event for the process to complete the second Playback path.



- ___ 7. Create a third Playback name and path.
 - ___ a. Click the **3** icon to create the third Playback path.
 - ___ b. Click in the **Playback 3 Name** entry box.
 - ___ c. Type in the text: New position non-compliant no override

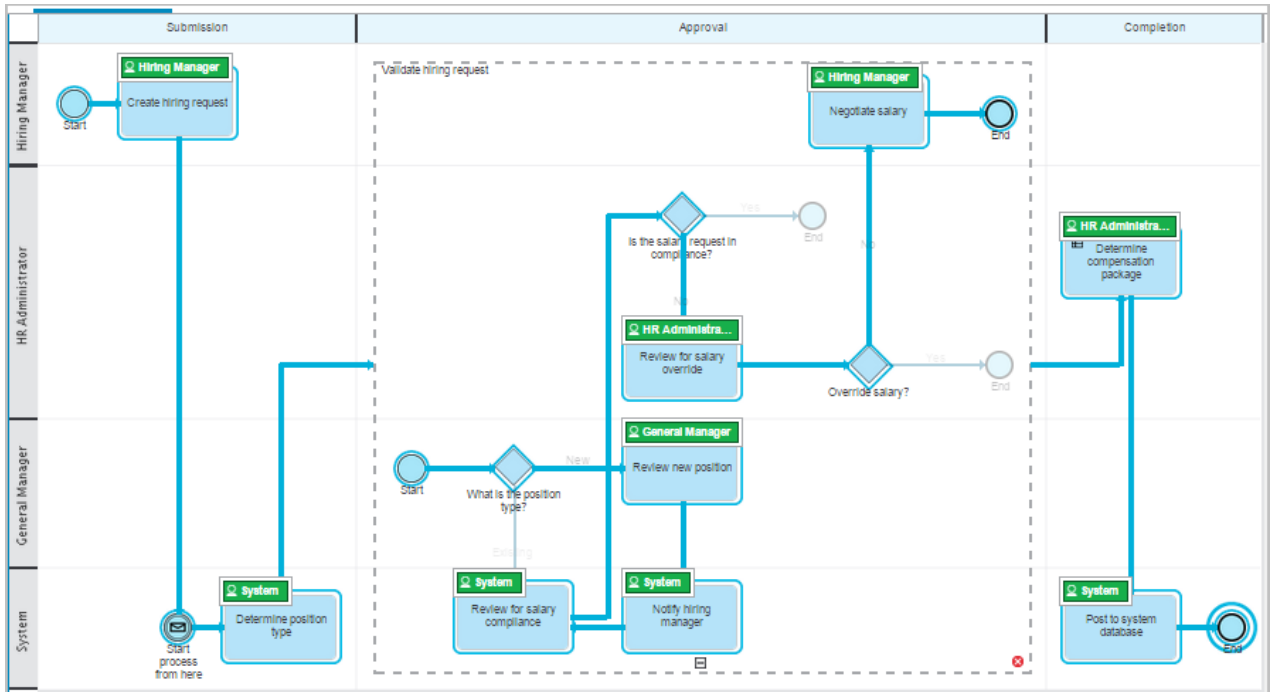
- ___ d. Click the **Start** event for the process in the Hiring Manager lane.
- ___ e. Click the **Create hiring request** activity.
- ___ f. Click the **Start process from here** event.
- ___ g. Click the **Determine position type** activity.

- ___ h. In the **Validate hiring request** subprocess, click the **Start** event.
- ___ i. Click the gateway: **What is the position type?**
- ___ j. Click the **Review new position** to follow a new position path.
- ___ k. Click the **Notify hiring manager** activity.
- ___ l. Now click the **Review for salary compliance** activity.
- ___ m. Next, click the gateway: **Is the salary request in compliance?**
- ___ n. Because this path is a non-compliant salary request, click the **Review for salary override** activity.
- ___ o. Now click the gateway: **Override salary?**



- ___ p. There is no salary override by the HR Administrator in this path, so the request is routed back to the Hiring Manager for a negotiation of the salary. Click the **Negotiate salary** activity.
- ___ q. Click the **End** event after the activity.
- ___ r. Click the **Determine compensation package** activity.
- ___ s. Click the **Post to system database** activity.

___ t. Click the **End** event for the process to complete the third Playback path.



This section completes the creation of three Playback paths to review with the business stakeholders. All three paths are about the hiring request new position. Each varies in compliance factors and whether a salary override is implemented or not.

Part 2: Conduct a Playback of the process diagram



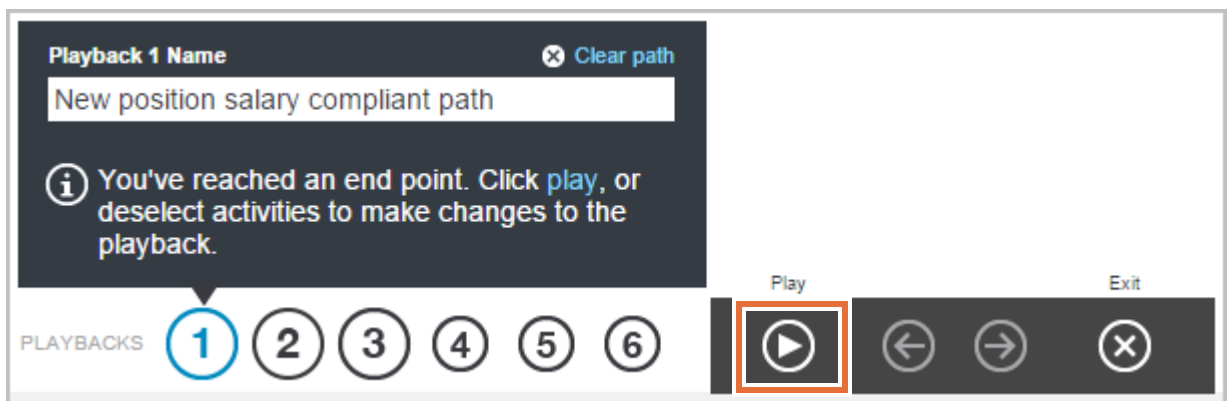
Information

Process Owner:

“These paths all look good. Run through each Playback path to make sure that they are ready for the Playback session with the others?”

1. Conduct a run through of **Playback 1**.

- a. Click the **1** icon beneath the Playback name, and click the **Play** icon to begin the Playback.



- b. To run through each element in the path, click the **Next** icon in the controller. To go back one element in the path, click the **Back** icon. To stop the Playback and edit the path, click the **Stop** icon. If you intend to exit out of the Playback mode altogether, click the **Exit** icon.



- c. Notice that the right pane provides the process details for each process flow element in the diagram. When you reach the end of a Playback path, you can choose to run the Playback again by clicking the **Replay** icon.

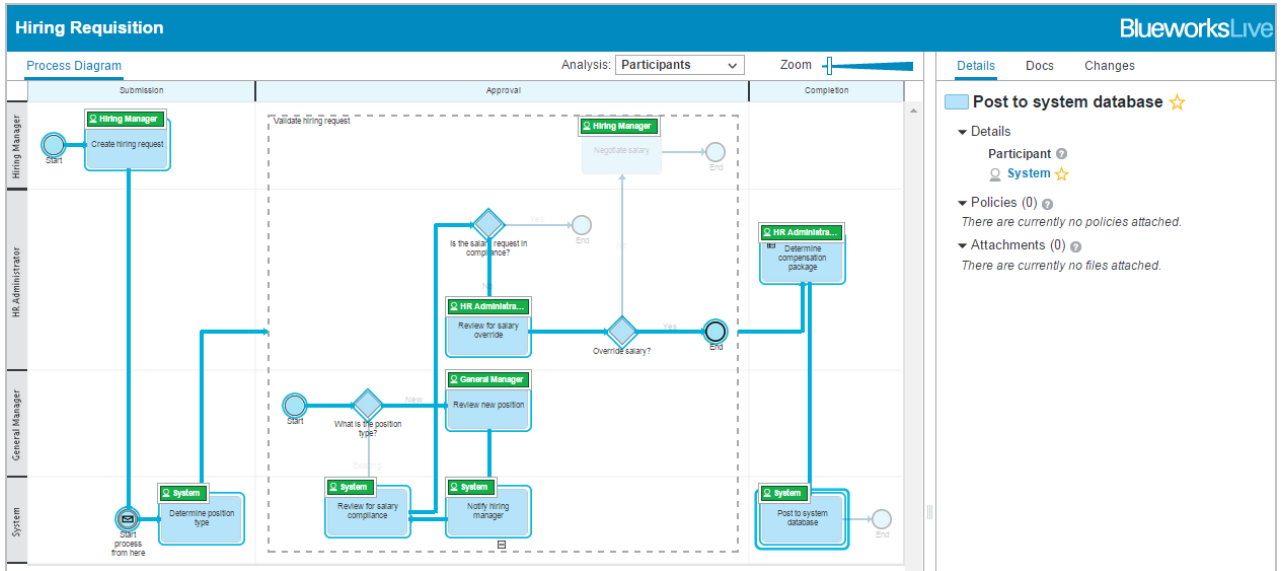


2. Conduct a run through of **Playback 2** and **Playback 3**.

- a. To conduct a Playback of **Playback 2** and **Playback 3**, click either the **2** or the **3** icon to begin.

- ___ b. Follow the same procedure that is described in step 1 to conduct a similar Playback for all existing Playback paths.
- ___ c. If at any time a particular element needs a focused review of the process details, the user can click directly on the element to highlight the details on the right pane.

This section concludes a run through of the Playback paths created. The process owner and author are ready to facilitate their first Playback session with the business stakeholders.



- ___ 3. Click **Exit** to end the Playback.

End of exercise

Exercise review and wrap-up

In this exercise, the steps to create a series of Playback paths for the process diagram was covered. After the Playback paths were created, the process author and process owner were able to run through each path to validate the process diagram. The process diagram is ready for the business stakeholder meeting and the first interim Playback session.



IBM Training

