**IBM Blueworks Live Account Administration**

Description: 5300_IBMpos

**ZB030 (Self-paced)**



Course description

In this course, you learn how to administer Blueworks Live, manage accounts, and use enhanced product features. The course is designed for advanced business users who have experience in creating, analyzing, and documenting business processes with Blueworks Live.

The first section of the course, “Managing users and user access,” teaches you how to manage users and account spaces. The second section, “Account management,” covers how to customize accounts, how to manage the glossary, and other account management needs. In the third section, “Blueworks Live enhancements," you learn how to capture policies and conduct playbacks in Blueworks Live.

Lab exercises throughout the course reinforce the concepts that you learn and allow you to practice managing Blueworks Live. These exercises require an established Blueworks Live account, which your organization must provide for you.

For information about other related courses, visit the IBM Training website:

**ibm.com**/training

General information

Delivery method

Self-paced virtual classroom (SPVC)

Course level

ERC 2.0

Product and version

Blueworks Live

Audience

This course is designed for experienced business users of Blueworks Live.

Learning objectives

After completing this course, you should be able to:

* Explain account and space management in Blueworks Live
* Manage user access permissions in Blueworks Live
* Customize account settings in Blueworks Live
* Manage account files and glossary in Blueworks Live
* Use enhanced features in Blueworks Live

Prerequisites

Before taking this course, you should successfully complete course ZB029, *Process Discovery and Modeling with IBM Blueworks Live*.

Duration

4 hours

Skill level

Intermediate

Notes

The following unit and exercise durations are estimates, and might not reflect every class experience.

This course is an update of ERC 1.0.

Course agenda

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| Course introduction  Duration: 10 minutes |

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| Unit 1. Managing users and user access  Duration: 40 minutes | |
| Overview | This unit reviews the methods that are used to manage users and user access in a Blueworks Live account and in a Blueworks Live space. You also learn about the differences between an account and a space, which are important foundational concepts for understanding how to manage users in Blueworks Live. |
| Learning objectives | After completing this unit, you should be able to:   * Invite users to a specific Blueworks Live account based on their designated roles * Grant users specific task-based permissions for a space in Blueworks Live |

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| Exercise 1. Creating a space and managing users  Duration: 20 minutes | |
| Overview | In this exercise, you grant specific task-based permissions to users in a space that you create. |
| Learning objectives | After completing this exercise, you should be able to:   * Create a space in a Blueworks Live account * Grant task-based permissions to users with specific roles in a space |

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| Unit 2. Account management  Duration: 40 minutes | |
| Overview | This unit reviews the methods that are used to manage accounts in Blueworks Live. Account management provides Blueworks Live users with the ability to manage files, customize an account, and modify the glossary. |
| Learning objectives | After completing this unit, you should be able to:   * Manage files in a Blueworks Live account * Modify the glossary in Blueworks Live * Customize an account in Blueworks Live |

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| Exercise 2. Customizing an account  Duration: 20 minutes | |
| Overview | In this exercise, you customize a Blueworks Live account to match your organizational needs. |
| Learning objectives | After completing this exercise, you should be able to:   * Change the color scheme and update the user interface * Customize email notification * Enable account preferences |

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| Exercise 3. Managing the glossary  Duration: 15 minutes | |
| Overview | In this exercise, you modify the glossary in Blueworks Live. |
| Learning objectives | After completing this exercise, you should be able to:   * Change glossary values in a Blueworks Live account * Edit glossary modification permissions for users |

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| Exercise 4. Deleting an attachment in a project  Duration: 15 minutes | |
| Overview | In this exercise, you learn how to manage files in a Blueworks Live account |
| Learning objectives | After completing this exercise, you should be able to:   * Change the color scheme and update the user interface * Delete a file that is attached to a Blueworks Live space |

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| Unit 3. Blueworks Live enhancements  Duration: 40 minutes | |
| Overview | This unit reviews the functional enhancements added to Blueworks Live in the spring of 2012. Blueworks Live allows users to add policies in process maps and diagrams, discover where certain tags are used in a process map or diagram, or conduct playbacks for initial discovery maps and diagrams. |
| Learning objectives | After completing this unit, you should be able to:   * Establish and enable policies for process models in Blueworks Live * Enable the "where used" functions in Blueworks Live * Conduct playbacks in Blueworks Live * Explain how to use single sign-on functions in Blueworks Live |

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| Exercise 5. Capturing a policy in a Blueworks Live blueprint  Duration: 15 minutes | |
| Overview | In this exercise, you establish a policy for a Blueworks Live account and capture the policy in a Blueworks Live blueprint. |
| Learning objectives | After completing this exercise, you should be able to:   * Capture a policy in a Blueworks Live blueprint |

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| Exercise 6. Conducting a playback  Duration: 15 minutes | |
| Overview | In this exercise, you conduct a playback for a Blueworks Live process model. |
| Learning objectives | After completing this exercise, you should be able to:   * Conduct a playback in Blueworks Live |

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| Unit 4. Course summary  Duration: 10 minutes | |
| Overview | This unit summarizes the course and provides information for future study. |
| Learning objectives | After completing this unit, you should be able to:   * Explain how the course met its learning objectives * Access the IBM Training website * Identify other IBM Training courses that are related to this topic * Locate appropriate resources for further study |

For more information

To learn more about this course and other related offerings, and to schedule training, visit **ibm.com/**training.

To learn more about validating your technical skills with IBM certification, visit **ibm.com**/certify.

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