

Course Guide

Process Discovery and Modeling in IBM Blueworks Live

Course code ZB031 ERC 3.0



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Course description

Process Discovery and Modeling in IBM Blueworks Live

Duration: 5 hours

Purpose

In this introductory course, you learn how to do process discovery, create process models, and capture process documentation with IBM Blueworks Live. Blueworks Live provides simple-to-understand product features that facilitate collaborative process discovery and modeling.

This course is designed for novice Blueworks Live business users, and it focuses on two main topics. First, you learn the core modeling skills and methods that improve the speed and quality of defining processes with BPMN. Second, you learn the core product skills and methods that are needed to model processes with IBM Blueworks Live. Exercises throughout the course are designed to reinforce the concepts that you learn, and allow you to practice by using Blueworks Live. The exercises cover skills such as capturing process details in a Blueworks Live Discovery Map, conducting Playbacks, and creating a process diagram.

Audience

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

Prerequisites

Before taking this course, you should successfully complete *Understanding Business Process Manager* (VW901G).

Objectives

- 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

Agenda

**Note**

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

- (00:10) Course introduction
- (01:00) Unit 1. The foundation for Process Modeling
- (00:15) Exercise 1. Creating an IBM Blueworks Live Space and blueprint process
- (01:00) Unit 2. Playback zero - Process Discovery
- (00:30) Exercise 2. Creating a Discovery Map
- (00:45) Exercise 3. Capturing process details in Discovery Map
- (01:00) Unit 3. Playback zero - Process Diagram
- (00:30) Exercise 4. Creating and modifying a process diagram in IBM Blueworks Live
- (00:30) Exercise 5. Conducting a Playback of the process diagram in IBM Blueworks Live
- (00:15) Unit 4. Course summary

Unit 1. The foundation for Process Modeling

Estimated time

01:00

Overview

This unit provides the foundation for creating a business process management (BPM) project, identifying the members of the project team, and modeling processes with Business Process Model and Notation (BPMN).

How you will check your progress

- Checkpoints
- Lab exercise

Unit objectives

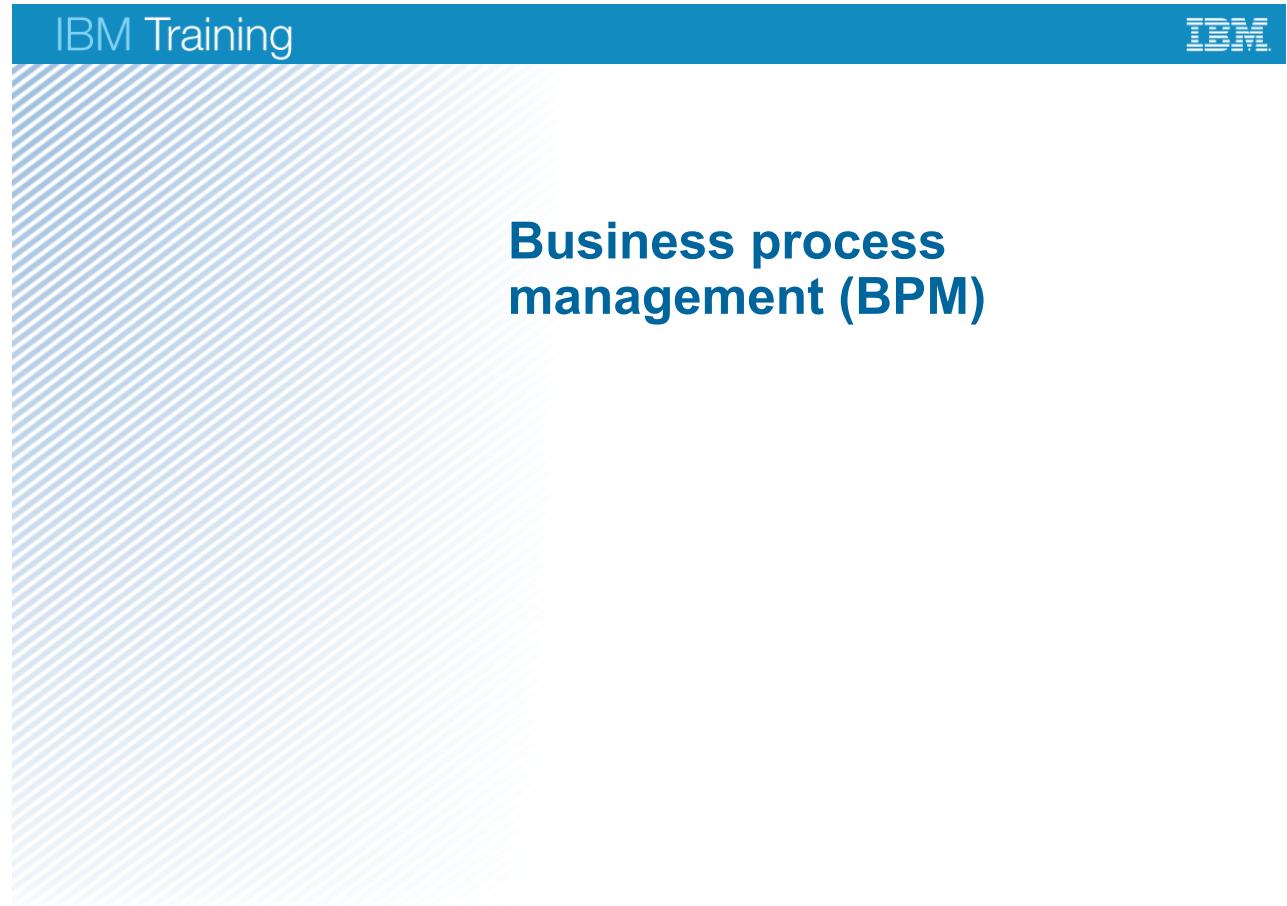
- Describe business process management (BPM)
- List the components of a BPM project
- List and describe BPM Project Team members
- List and describe the Process Modeling phases
- Describe how IBM Blueworks Live fits in Process Modeling

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Figure 1-1. Unit objectives

1.1. Business process management (BPM)



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Figure 1-2. Business process management (BPM)

Topic 1: Business process management (BPM)

Topics

Business process management (BPM)

- Process modeling
- Introducing IBM Blueworks Live

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Figure 1-3. Topics

What is business process management (BPM)?



Comprehensive change management of business processes
that results in continuous process improvement

Figure 1-4. What is business process management (BPM)?

Business process management (BPM) excels at providing a comprehensive change management of business processes, which results in continuous process improvement. Processes are meant to evolve as the organization or external conditions change.

Three themes

Goal	System	Results
The BPM goal is efficient and effective business processes with visibility.	The BPM system is the management of people-to-people work steps, system-to-system communications, or person-to-system interactions.	The BPM expected result is process improvement that brings about financial benefits and customer and employee satisfaction.

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Figure 1-5. Three themes

BPM is also described with these common themes: the goal, the system, and the expected results.

All companies have processes; however, the visibility of processes can be varied. BPM is a way to increase that visibility and hence give direction to the continued efficiency of the processes.

In true BPM, all aspects of a system are important, including human interactions. True BPM seeks to define and visualize all aspects of your process regardless of what role or system is conducting that part of the work. BPM results in continual process improvement, which provides many beneficial outcomes to the client.

A BPM vision

“

BPM is the means by which companies and governments improve their operations by using internal business expertise in new, scalable ways.

Improvement is achieved by directly engaging business people in the design, definition, and creation of enterprise-class process applications.

”

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Figure 1-6. A BPM vision

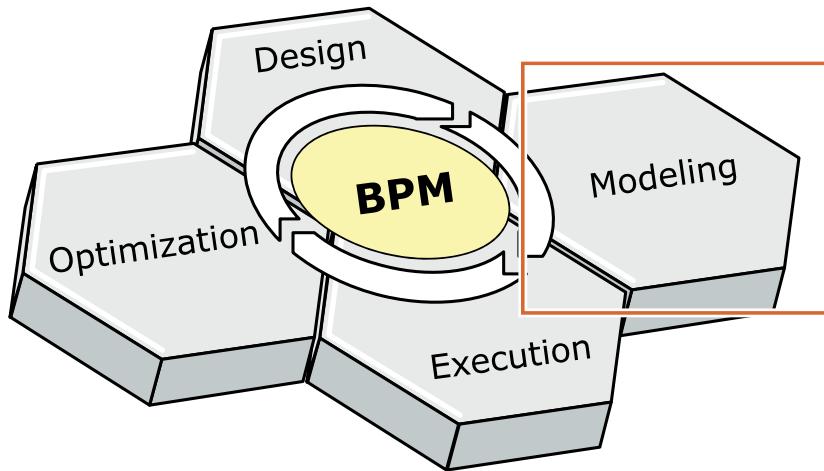
Does BPM have or even require a vision? If the ideal is to match existing core competencies and tool sets with the stated goal, system, and expected result, then the vision might be limited to only the execution of a process application build. It would also affect what a process model might look like and what it would communicate to an application development team.

What if a broader vision for BPM is the following?

“BPM is the means by which companies and governments improve their operations by using internal business expertise in new, scalable ways. Improvement is achieved by directly engaging business people in the design, definition, and creation of enterprise-class process applications.”

This vision provides a wider scope for BPM in that it specifies the change not only to the business process but also to the strategies, development methods, and most importantly, the thinking in project development. BPM is a business-led solution, and any tool set that is used to implement it must support that involvement.

The modeling phase



- Process discovery and documentation
- Process analysis
- Simulation and adjustment

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Figure 1-7. The modeling phase

This course focuses on the modeling phase of the BPM lifecycle and how business and IT collaborate to create the process model. The modeling phase is more than just creation of the process model; it also requires an understanding of how to adjust the model to meet evolving business requirements. So, throughout this phase, the process model goes through continued analysis and a series of adjustments and refactoring efforts to obtain a model that can be implemented into a process application.

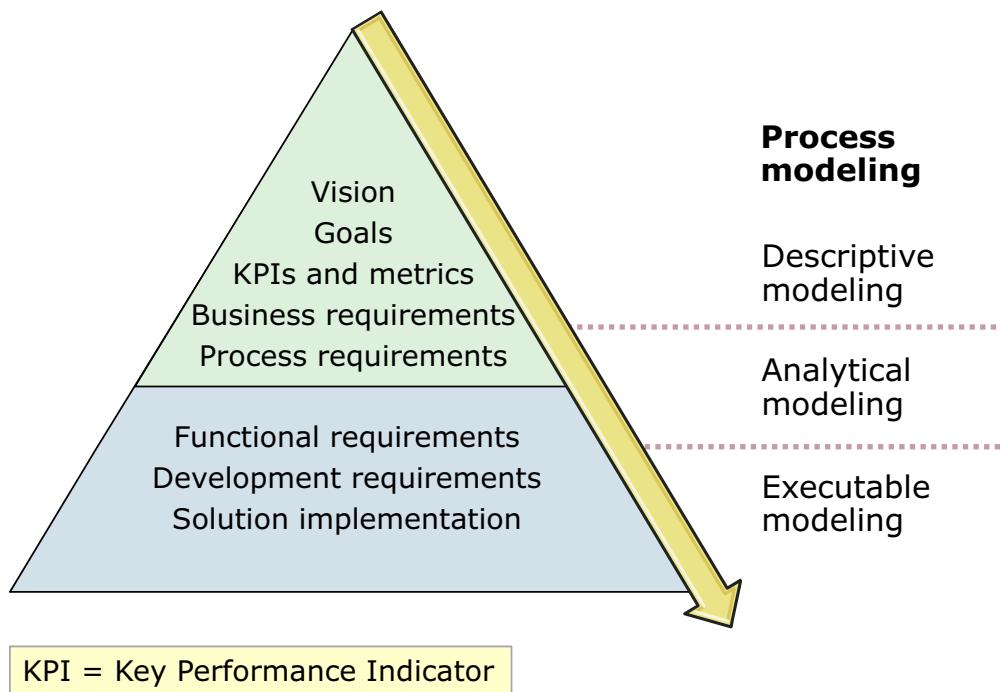
All the adjustments and testing allow for a process model that meets what the business expects in terms of an improved and efficient business process at the end of project development.

BPM done correctly results in business processes that are modeled, analyzed, and adjusted early and often. The BPM effort goes far beyond basically applying technology to a process to yield a changed process. Applying technology to automate a bad business process without regard to necessary analysis and adjustment efforts leads only to a more efficient, but still bad process.

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BPM modeling goals



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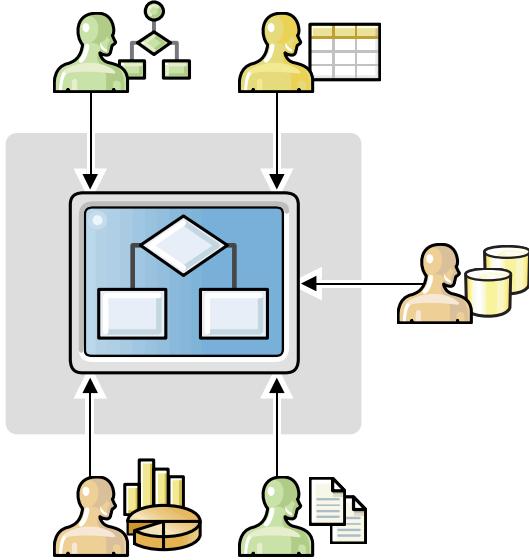
Figure 1-8. BPM modeling goals

Descriptive and analytical modeling has unique goals to accomplish before moving on to the executable modeling. Executable modeling is tied directly to business process implementation, or execution, as noted in the BPM methodology phases. The goals during descriptive and analytical modeling are:

- Capture the vision for the process that is developed during the design phase of the BPM methodology
- Capture the goals for the process that is developed during the design phase of the BPM methodology
- Establish the KPIs and metrics for the process
- Capture business requirements for outcomes of the process, such as improved delivery or increased revenue
- Establish the process requirements through process improvement collaboration sessions with business stakeholders
- Establish functional requirements through user stories and improved process documentation

BPM project teams

- Process sponsor
- Process owner
- BPM project manager or program manager
- Subject matter experts
 - Core process activities
- Core team members
 - Analyst
 - Developer
 - Solution architect
- Administrators
- Facilitators
 - Ad hoc member (optional)



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Figure 1-9. BPM project teams

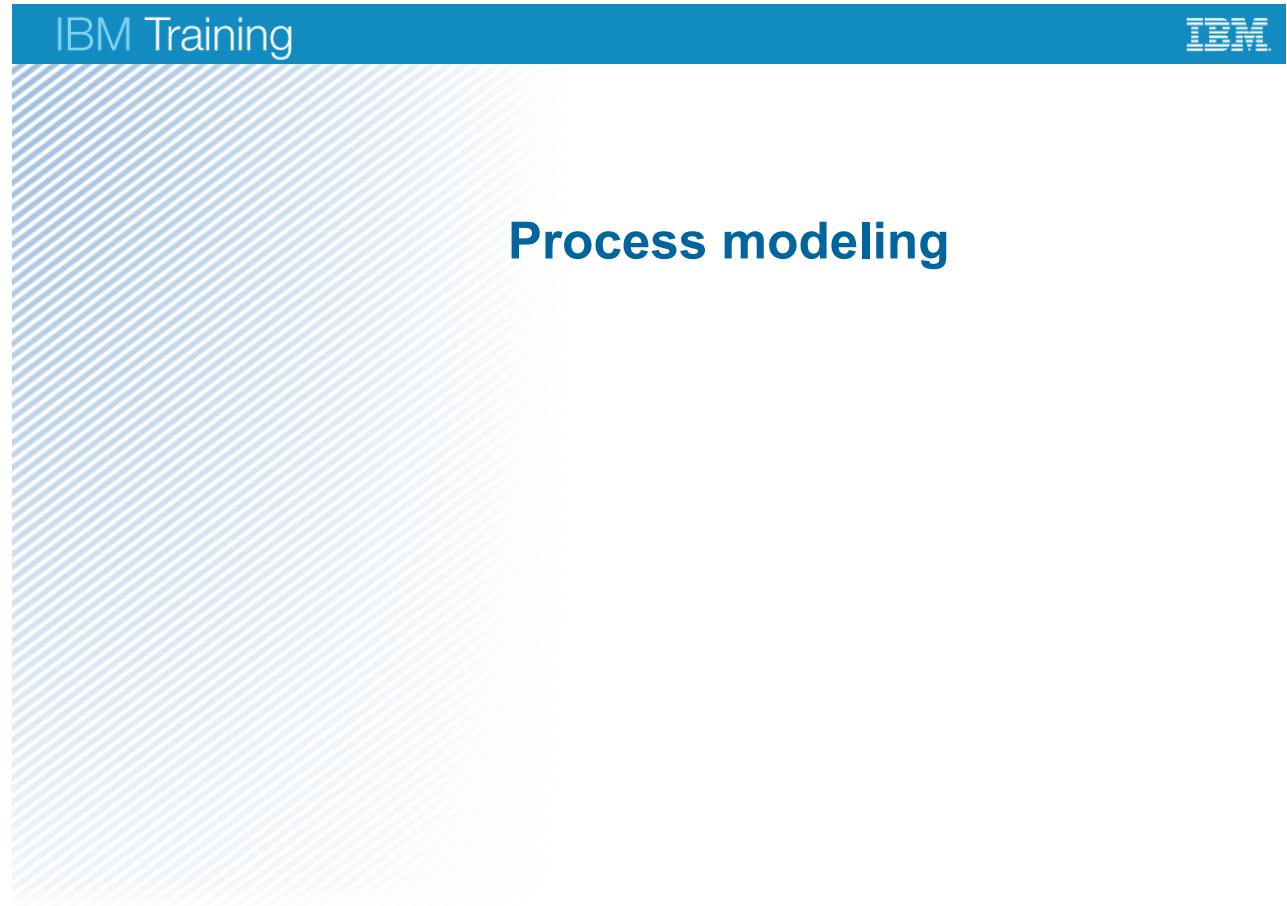
The unique phases and components of a BPM project require a specific set of project roles, including:

- **Process sponsor:** The person responsible for establishing the project goals and scope, securing organizational support and resources, and ensuring alignment with organizational business goals.
- **Process owner:** The person who is accountable for the successful execution of the process, knows the process from end to end at a high level, and can identify the subject matter experts.
- **BPM project or program manager:** The person responsible for the success of the project.
- **Subject matter experts:** The people with knowledge of specific process resources, or systems.
- **Core team members:** The business process management (BPM) development teams, typically including BPM analysts, BPM developers (includes integration designer developers and technical consultants), and solution architect (advanced role that can lead teams and serve as an analyst and developer).
- **Administrator:** The person who installs, updates, and configures the business process management system.

- **Facilitator:** (optional) The person who typically manages the collaboration meetings for a BPM team.

All of these participants work together to collaborate in the design of the process model.

1.2. Process modeling



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Figure 1-10. Process modeling

Topic 2: Process modeling. This section covers process modeling in more detail. The discussion begins with the basics of process modeling and moves into specifics about descriptive and analytical modeling that is handled in the modeling phase of the BPM methodology.

Topics

- Business process management (BPM)
- ▶ Process modeling
- Introducing IBM Blueworks Live

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Figure 1-11. Topics

What is a business process?



- A set of activities that takes specific inputs and converts them into specific outputs in a defined, predictable fashion

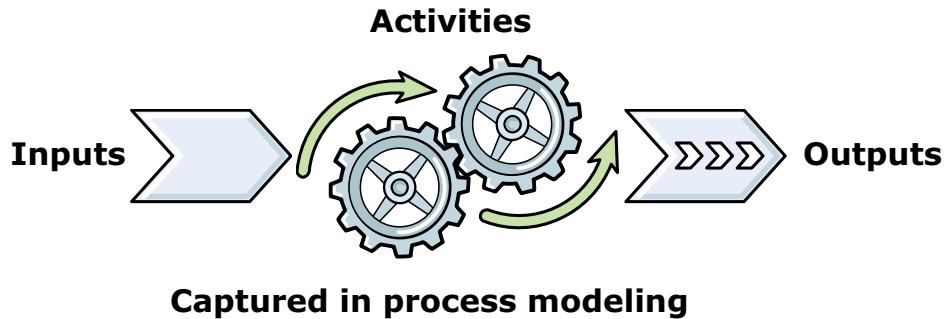
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Figure 1-12. What is a business process?

A business process is a set of tasks or activities that takes specific inputs and converts them into specific outputs in a defined, predictable fashion. Inputs typically consist of information or a set of information that triggers a set of activities in the process. Outputs are the results that the activities render.

What is process modeling?



- Captures the ordered sequence of the business process tasks or activities

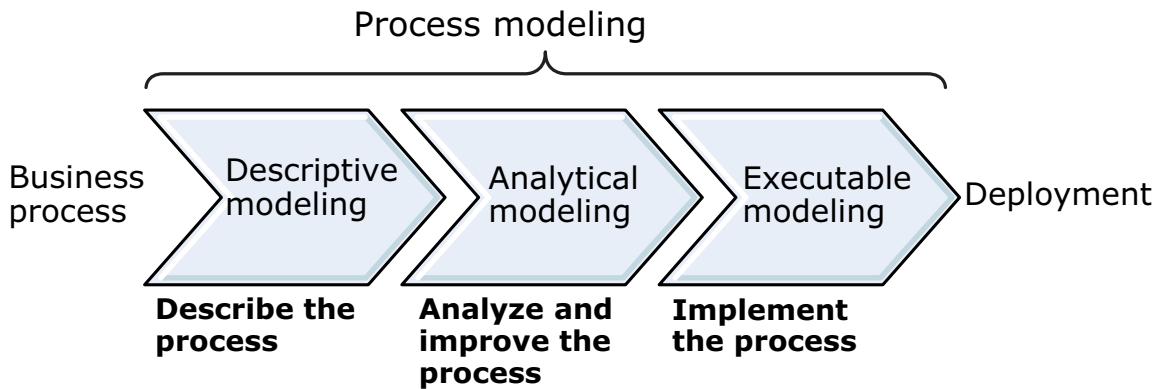
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Figure 1-13. What is process modeling?

Process modeling captures the ordered sequence of the business process tasks or activities, and the responsible roles that are conducting the activities. It also captures the conditional branching and the sequencing of the flow of work between activities, along with the supporting information from start to end.

Three-phase approach



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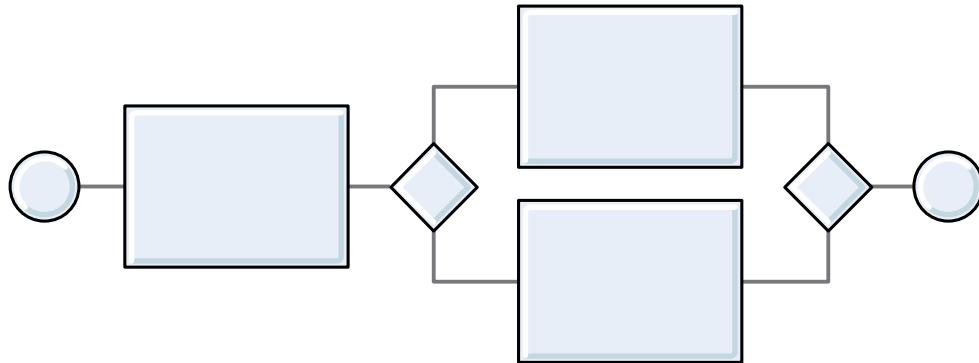
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Figure 1-14. Three-phase approach

Process modeling can be described as having a three-phase approach:

- **Phase I or descriptive modeling:** This phase describes the process. This high-level model provides a description of the process that is based on business requirements. The model is easily communicated across the organization.
- **Phase II or analytical modeling:** This phase analyzes and improves the process. This analytical, more detailed modeling shows all pertinent activities and flow that are used to detail process requirements.
- **Phase III or executable modeling:** This phase implements the process. This model details the functional requirements to implement the executable process application.

What is a process model?



A graphical representation, or diagram, of the business process that is universally understood and easily communicated.

Figure 1-15. What is a process model?

A good process model is a graphical representation or diagram of the business process that is universally understood. Business people understand it easily, and it is directly implemented in a business process management system (BPMS) such as IBM Business Process Manager.

For all parties to understand a process model universally, process owners, process participants (business), and the BPM development teams must easily understand each other and recognize the same concepts in the same context. IT does not need to redraw a process model to provide more clarity or a different point of view.

A good process model provides views into a process that are clearly and easily communicated in 5 minutes or less, at every level of granularity.

Process model development

Now that it is established when and what must be accomplished in process modeling, the next thing to focus on is how process modeling is accomplished in terms of development methods.

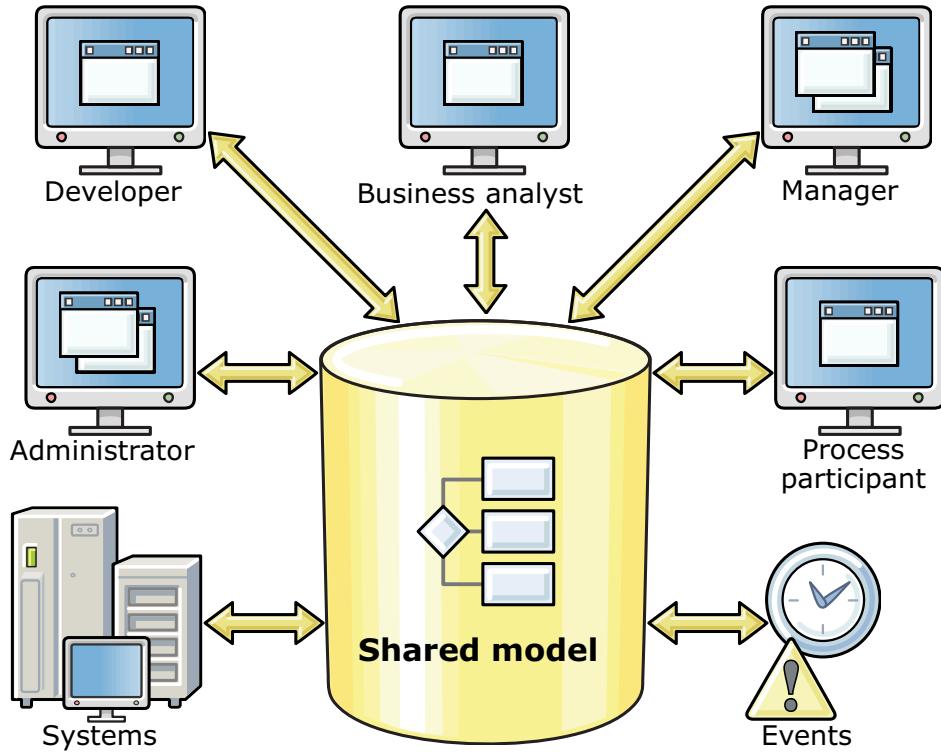
Understanding how to model a process requires comprehension of the project development methods that are used for BPM. Realize that project development strategies for process models differ from standard methods, especially when you consider the usage of process models. In standard project development, the shelf life of diagrams that are derived from requirements is only from the business hand-off to the development teams. In essence, these requirements are translated into code, and their use ends at that point.

BPM process models are different. Going back to the BPM lifecycle, notice that the process model evolves in terms of usage. The prolonged shelf life of a process model allows for the iterative BPM lifecycle because it is data-driven and not code-driven. This setting provides the stability for a process application without fear of having to start from scratch when change is needed.

This data-driven process model is known as a business process definition (BPD) in IBM Process Designer.



The right process model development strategy



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Figure 1-16. The right process model development strategy

IBM Business Process Manager uses a single shared environment for project design and development. All process artifacts are stored in a single shared model architecture. All parties that are involved in the effort to define, model, implement, measure, and improve the process are working from a common shared model that encapsulates all of the various components. It helps maintain the vision of bringing business and IT together.

The following list shows various people who are all using the same business process definition, or process model:

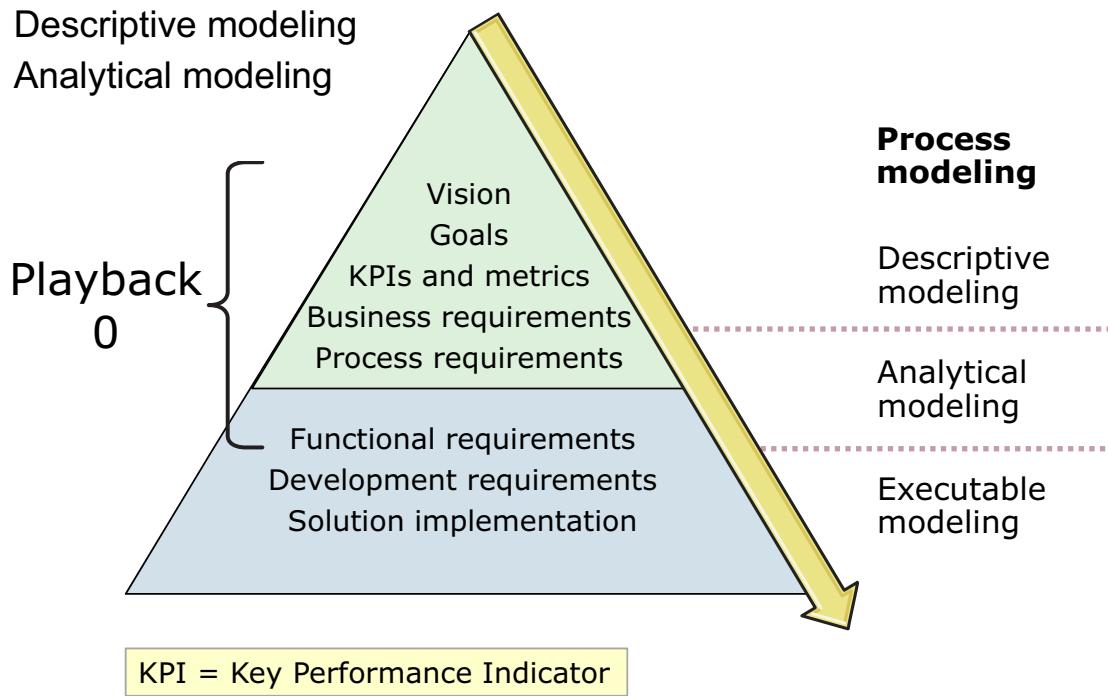
- Business analysts who are modeling the process
- The IT developers who are constructing the detailed implementation of the model
- The responsible process participants who are completing their activities in the process
- The process owner and analysts who monitor the process performance and identify improvements

The model of the process that the analysts and developers build is the same one that completes at run time. It is the same one that is used to create reports on the performance and status of the process, and the same one that is used to implement process improvements.



Playback 0

- Descriptive modeling
- Analytical modeling



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Figure 1-17. Playback 0

The definition stage of project development focuses primarily on descriptive and analytical process modeling. There is a Playback 0 for the definition stage. The goal for Playback 0 is that the concerns and achievements at this stage of project development are iterated until a final solution is reached.

The process must be discovered before it is modeled as a diagram. That requires sessions with the business process owner to uncover the particulars of the business process at a high level. As the process is defined, it is then necessary to start to analyze and create initial models if possible. Use an incremental approach from the current state to a future state business process that is accepted and agreed upon as a final “to be” model.

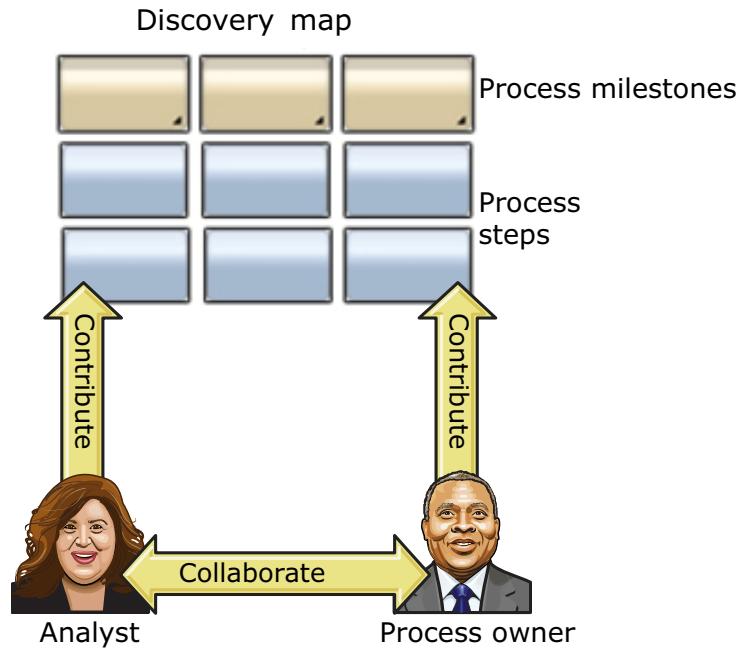
Descriptive modeling

The descriptive modeling that is accomplished at early stages can be done with various tools, including Blueworks Live. Blueworks Live is an effective tool for process modeling that is focused on process discovery and analysis. A brief introduction to Blueworks Live is in the next unit.

Early stage, or descriptive, modeling that is based on discovery and analysis has a specific outcome. Process model diagrams and documentation are refined until both the process owner (business) and BPM team designate that the business process is completed and validated. The focus now changes from business requirements into actual process requirements.

The milestones to get to the final stage in descriptive modeling are process discovery and the as-is model.

Playback 0: Process discovery (1 of 2)



- Document the current state of the business process
- BPM analyst, process owner, and BPM project manager

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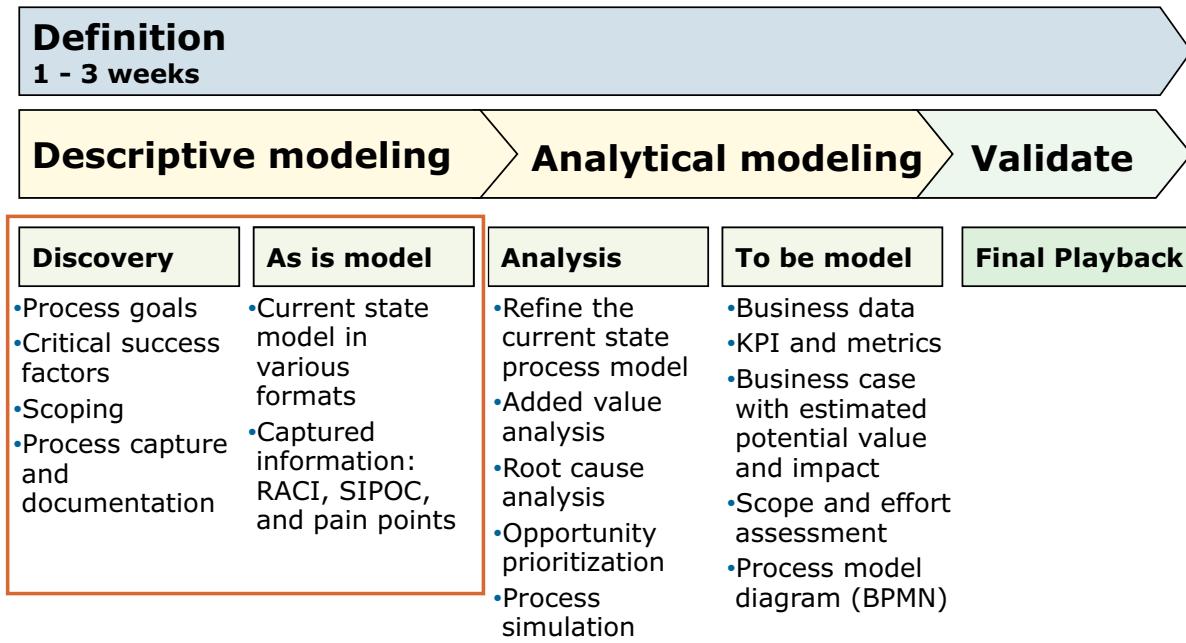
Figure 1-18. Playback 0: Process discovery (1 of 2)

The process discovery effort in Playback 0 allows for the capture of the initial process information that translates into the initial process model. It is typically an effort from process owners and BPM team members who want to make sure that the current state of the business process is documented. This documentation can be stored in various tools available to the team, including Blueworks Live. However, Blueworks Live has the advantage of providing connectivity to IBM Business Process Manager. With Blueworks Live, the documentation effort maintains a high level of usage, even beyond process discovery and analysis of the business process.

Agile software development values working code over comprehensive documentation. Although documentation is valuable, code that works is more valuable. Process discovery should attempt to capture the process as quickly and accurately as possible, but should not sacrifice project time to create documentation that does not lead to the project goals. Capturing and documenting processes inside of a tool like Blueworks Live and IBM Business Process Manager directly contribute to implementing the process.

Playback 0: Process discovery (2 of 2)

Playback zero



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Figure 1-19. Playback 0: Process discovery (2 of 2)

Descriptive modeling is discovering what you currently have; it is providing visibility. The aim is to document the As Is model, or what you currently do. This action provides the baseline for going forward.

Moving from discovery to model:

Business process discovery documentation, or mapping, with as much process detail as possible, is at times a quick process. The beginning of a process modeling effort can happen early. Therefore, the most common question when in the midst of a process discovery effort is: When do you move from process discovery to process modeling?

Several aspects must be considered to answer this question.

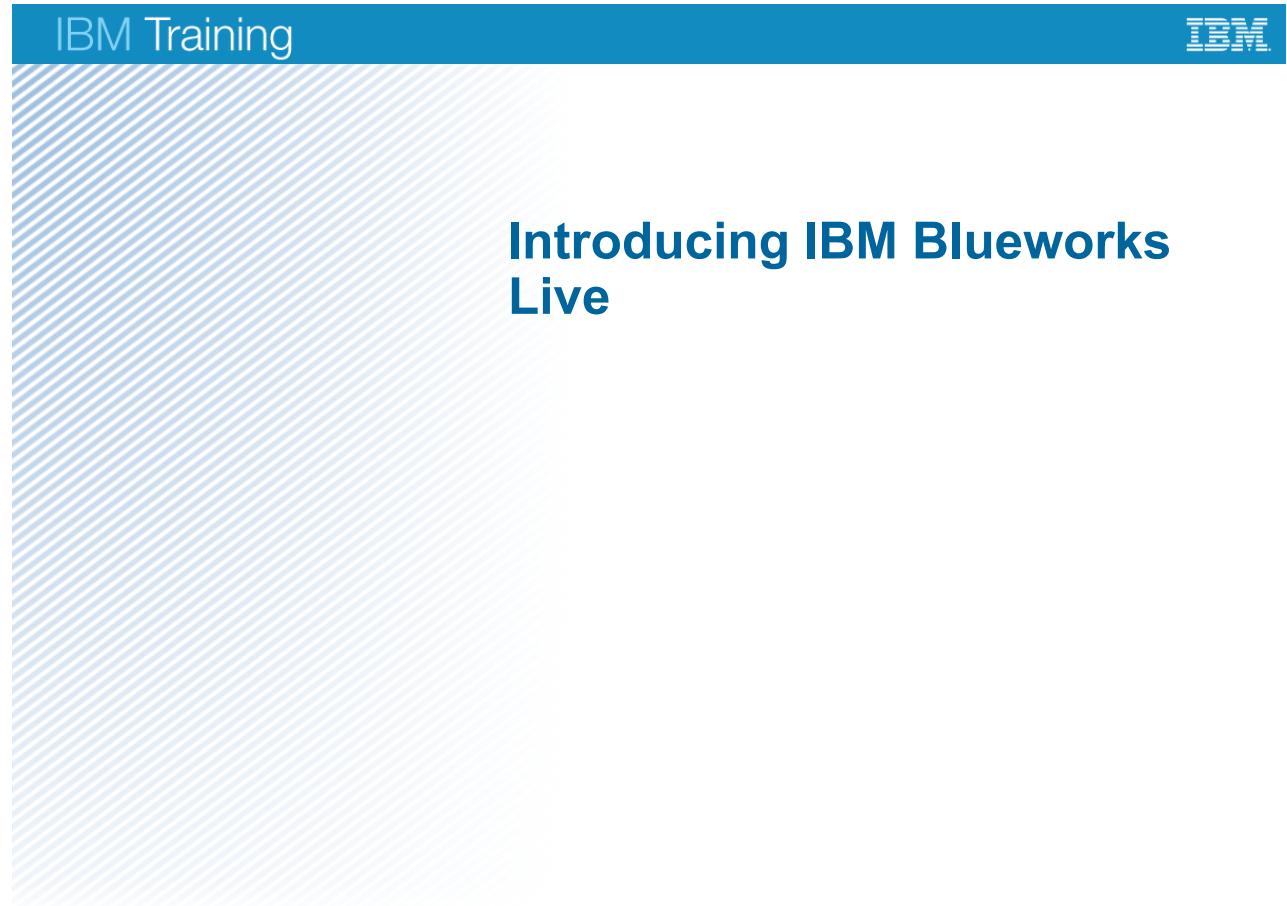
It is time to transfer to a process model when process discovery sessions exhaust all requirements to communicate the following concepts:

- What a process is
- Who is responsible for process task completions
- Who is documenting the problems within the process

Also, consider the conversations in the process discovery sessions during Playback 0 meetings. If the questions are no longer centered around “What does this process do?”, and start to center around “What does this process look like?”, then the move to a process model is at hand.

- RACI = responsible, accountable, consulted, informed
- SIPOC = suppliers, inputs, processes, outputs, customers

1.3. Introducing IBM Blueworks Live



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Figure 1-20. Introducing IBM Blueworks Live

Topic 3: Introducing IBM Blueworks Live

Topics

- Business process management (BPM)
- Process modeling



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Figure 1-21. Topics

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Figure 1-22. IBM Blueworks Live overview

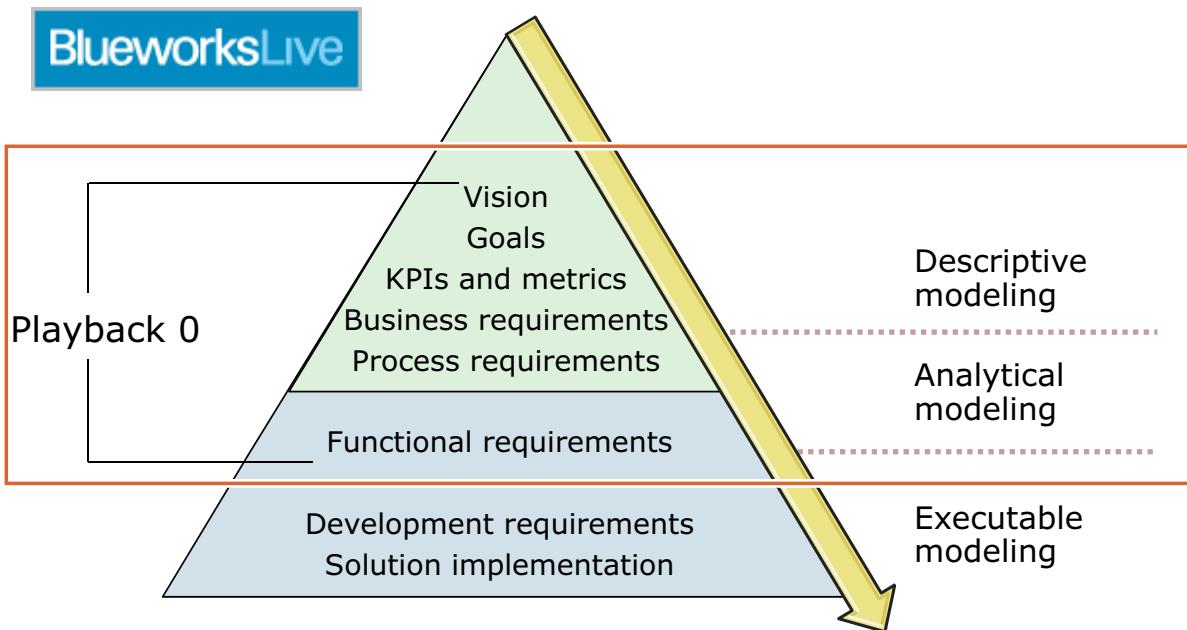
IBM Blueworks Live efficiently handles each component of a BPM project and the three phases of process modeling. IBM Blueworks Live also provides built-in functions to involve business people throughout the modeling phases, whether it is through direct collaboration or process model validation meetings, called “Playbacks”, which are part of the functional charter for the tool. IBM Blueworks Live is an easy-to-use environment conducive to a business-centric focus.

IBM Blueworks Live is a software as a service that allows users to create and collaborate on process discovery maps, blueprint process diagrams, process documentation, and process applications.

You can access IBM Blueworks Live at <https://www.blueworkslive.com>



Playback 0



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Figure 1-23. Playback 0

When it comes to developing process models, BPM project teams use IBM Blaworks Live to reach each goal in the descriptive and analytical modeling effort. When the final process model is approved in the analytical modeling phase, the model can be shared with IBM Business Process Manager for the executable modeling effort to begin.

The February 2016 release is here with a new Help system, twice as many custom properties, Glossary enhancements, productivity improvements and support for Internet Explorer 11.

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.

The April 2014 release is here with Publishing and Integrated Governance of Blueprints and Decisions.

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Figure 1-24. IBM Blueworks Live essentials

How does IBM Blueworks Live help create process models?

Look at the essentials of IBM Blueworks Live first to understand how each works in concert to help create process models. The following essentials are covered in this section:

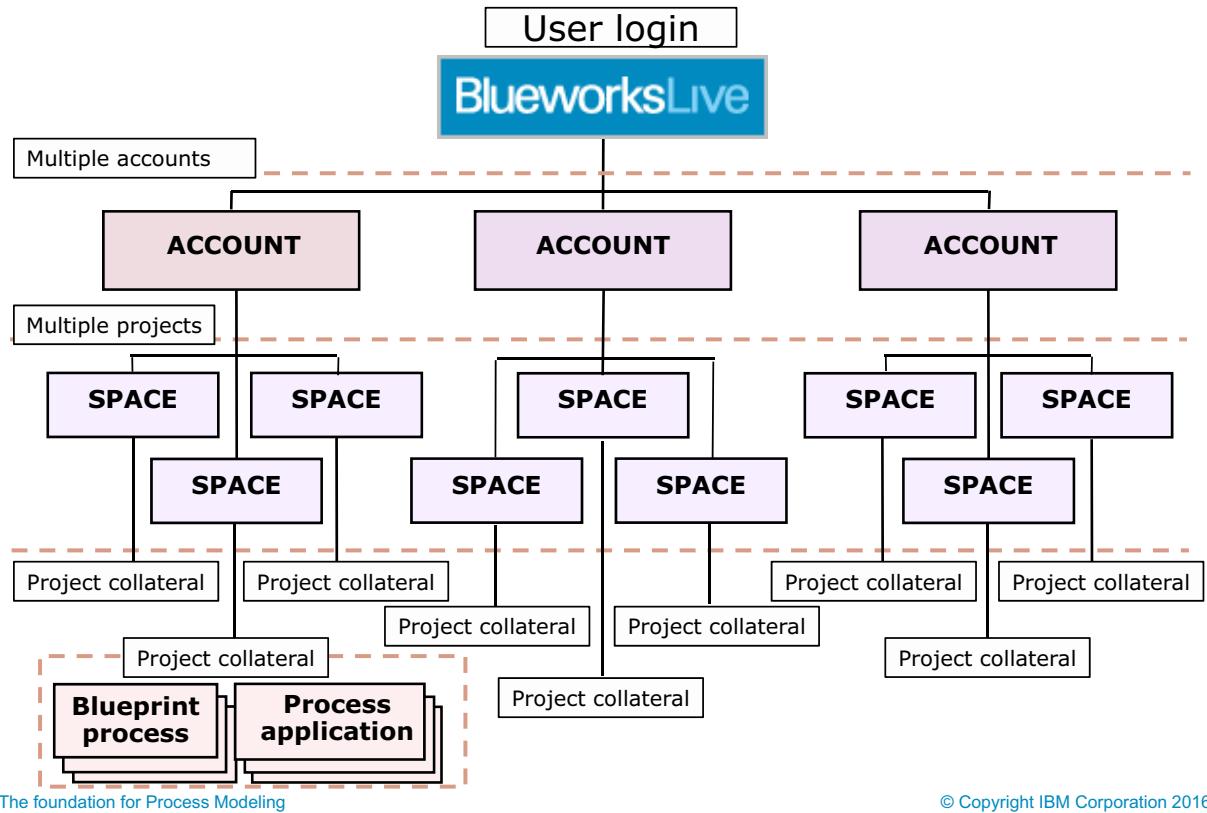
- Accounts
- Spaces
- Blueprint processes

It all begins with a Blueworks Live account. For the purposes of this course, a Blueworks Live account is needed. The organization distributes available account licenses. If the user does not have an account, a 30-day trial account is available. To obtain a trial account, a user can:

1. Click the **Sign up now** link in the Blueworks Live login site.
2. Complete the required information.
3. Click the **Review and create my account** icon.
4. Accept the account to start a 30-day trial.



IBM Blueworks Live account structure



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Figure 1-25. IBM Blueworks Live account structure

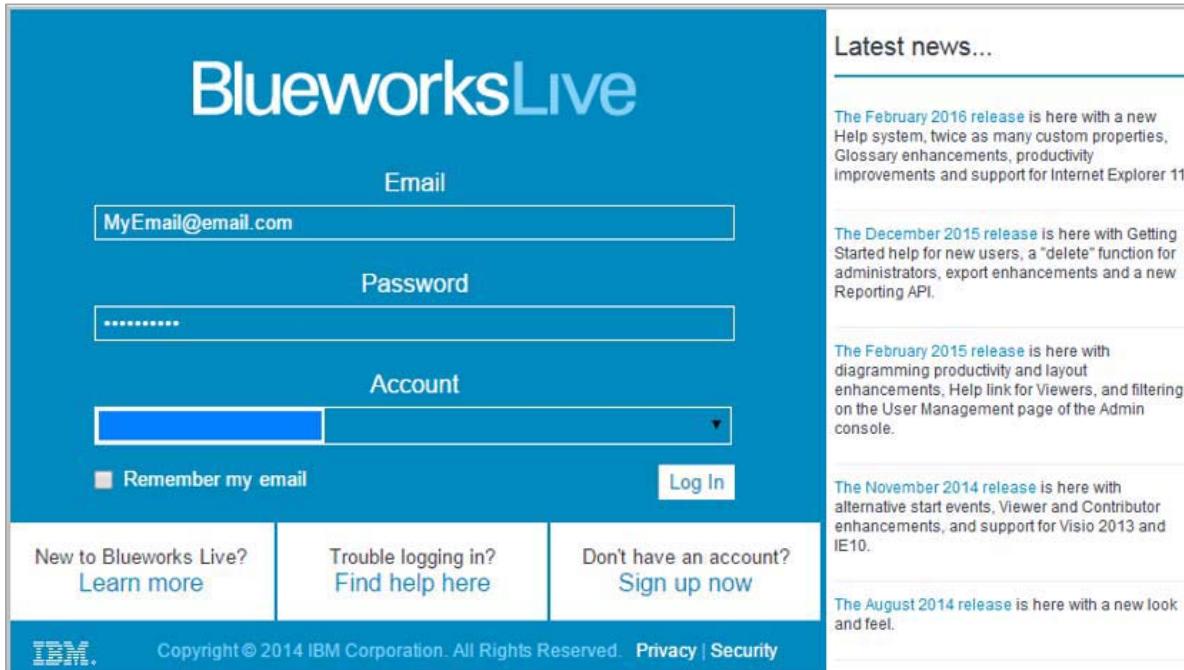
In Blueworks Live, most users belong to a single account. However, some users belong to multiple accounts because they share work with different organizations and therefore are invited to join multiple accounts. Accounts contain projects that are known as spaces. The collaboration work is done in processes and applications that are found in spaces within an account. An individual user has access to those processes and applications, which depends upon the permissions that the space owners establish for the spaces that they create.

This section covers the account, spaces, and processes in more detail.

IBM Training



Blueworks Live account administration



The February 2016 release is here with a new Help system, twice as many custom properties, Glossary enhancements, productivity improvements and support for Internet Explorer 11.

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.

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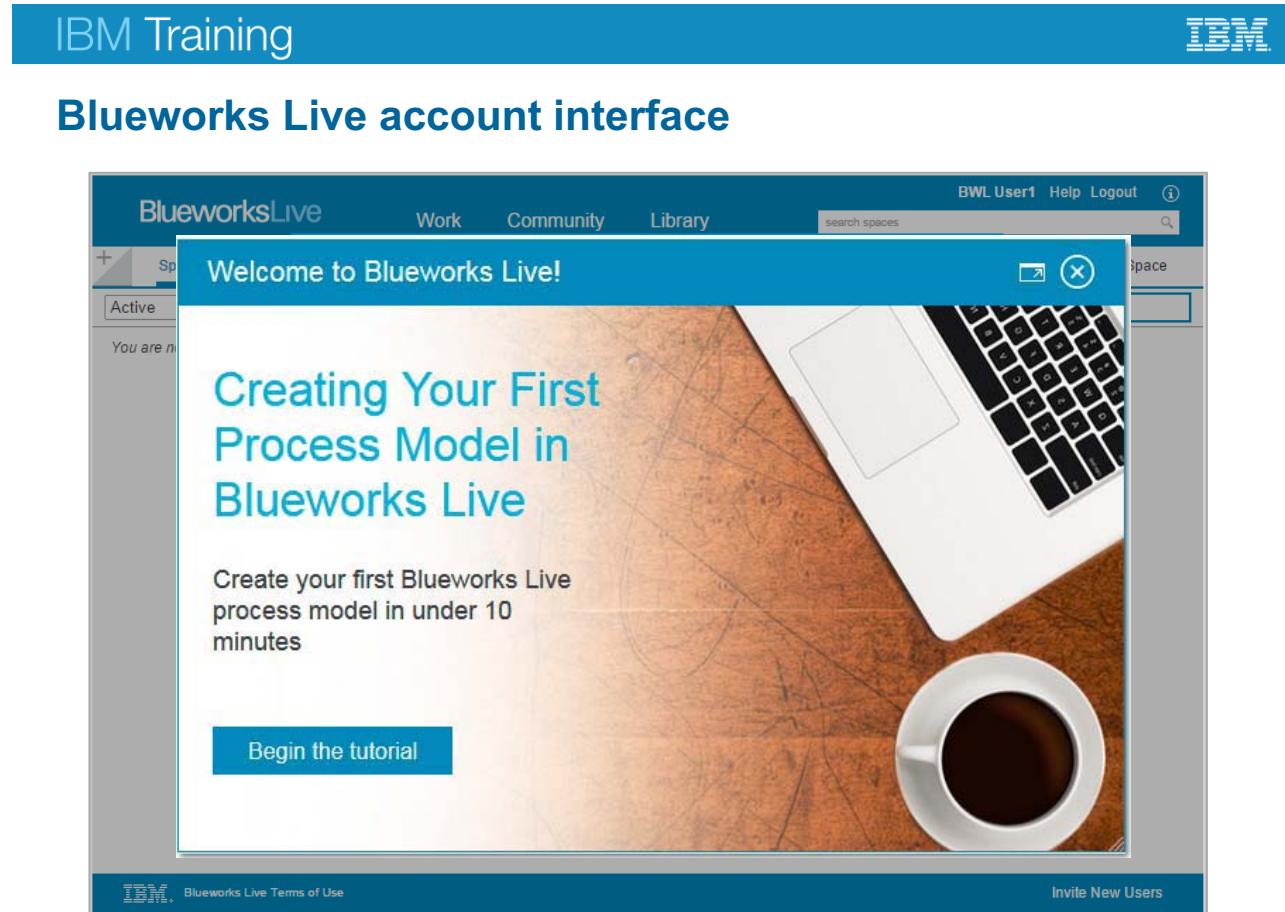
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Figure 1-26. Blueworks Live account administration

To begin working in the account, users log in using their access information, a user ID, and password. When they click the login icon, they are prompted to select which account they want to access if they have multiple accounts and then asked to click the login icon again. If they have just one account, they are taken to the account home page.

Administration of an account is provided to users when they create an account in Blueworks Live. For accounts that a user is invited to participate in, the access of the account is automatically set in the invitation for the user through a license type. However, a license type, such as Editor or Contributor, does not mean that the user can administer the account. A user that is invited to join an account is granted the account administration privilege by the account administrator.

To learn more about IBM Blueworks Live user management and account administration, sign up for the ZB030 or ZB032: *IBM Blueworks Live Account Administration* course.



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Figure 1-27. Blueworks Live account interface

An initial account provides a welcome message with **What's New** information. To get rid of the splash screen, the user clicks the X icon in the dialog box and populates the account with spaces (projects), processes, and applications.

The screenshot shows the IBM Blueworks Live 'Work' page. At the top, there's a navigation bar with 'IBM Training' on the left and the 'IBM' logo on the right. Below the navigation bar is the main content area. The 'Work' tab is highlighted with a red box. The main content area has several sections: 'Tasks assigned to me' (selected), 'Work I've launched', and 'Work I'm following'. Under 'Tasks assigned to me', there's a 'Work Stats' section, a 'Filter' bar, and four expandable sections: 'Tasks Due Today' (0 tasks), 'Tasks Due This Week' (0 tasks), 'Tasks Due Later' (0 tasks), and 'No Due Date' (0 tasks). To the right, there's a 'LAUNCH A PROCESS' sidebar with a 'Filter' bar and three options: 'Create a Checklist', 'Submit Document for Review', and 'Submit Process for Review'.

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Figure 1-28. Work

The default landing page for accounts is the Work page. From the Work page, a user can quickly review the following information:

- **Task assigned to me.** From this tab on the Work page, users can review work that assigned to them in a Blueworks Live process application. For example, a sales organization builds a process application that assigns review tasks for different participants. If one of those review tasks was assigned to the user, it would be here. The option for a user is to view *Opened* or *Completed* tasks. For opened tasks, the user reviews tasks with different due dates, such as due today.
- **Work I've launched.** From this tab on the Work page, a user can review work that is assigned through a Blueworks Live process application. For example, the user can create a workflow process application that requires sign-off by specific process participants. The user can check in this tab to see the status of the tasks.
- **Work Stats.** The user can review statistics of work assignments with process applications. The three tabs that are covered on the Work page so far all pertain to automated processes, also known as process applications.
- **Items I'm Following.** This tab on the Work page provides the user the ability to earmark specific spaces, business processes, policies, values, activities, and work. To manage quick access to specific items, users place the items that they want in the **Items I'm Following** mode.

More detail on how to place items in an account as **Items I'm Following** is covered later in this course.

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with links for Work, Community, Library, and a search bar labeled 'search processes'. Below the navigation bar, there's a toolbar with icons for Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. A dropdown menu shows 'Active' and 'Processes (2)'. On the right side of the toolbar, there are buttons for 'Blueprint a Process' (highlighted with a red box), 'Automate a Process', and 'Filter'. The main content area has a title 'Blueprint a Process'. It asks for a 'Process Name' and provides a note that default settings will follow all processes. It also asks to select a 'Space Name' from a dropdown menu ('Choose a space...'). A large 'Create' button is at the bottom.

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Figure 1-29. Blueprint a process

From the Library page, a user can create a blueprint process. A blueprint process is the business process that contains the discovery map, the process documentation, and ultimately the process model, or diagram. It is important to note that only users with a certain permission, such as administrators or editors who are granted the permission, can use this function in Blueworks Live. For users who do not have the permission, such as contributors who are invited to an account, the **Blueprint a Process** icon is not displayed.

How to create a blueprint process and attach it to a space, or project, is covered in more detail later in this course.

The screenshot shows the IBM Training interface. At the top, there's a blue header bar with the text "IBM Training" on the left and the IBM logo on the right. Below this, the main content area has a title "Automate a process". The interface is divided into two main sections: a large central panel and a smaller sidebar on the right.

Main Panel:

- Title:** Automate a Process
- Description:** Automation allows you to create a simple process app that can be launched by users to perform work items.
- Form Fields:**
 - Process App Name:** A text input field with a placeholder icon.
 - Workflow:** A dropdown menu set to "Workflow" with a small icon next to it. A tooltip explains: "Allows you to define a sequence of tasks and approval steps that can be assigned to a set of users."
 - Space Name:** A dropdown menu labeled "Choose a space...".
 - Create:** A blue button at the bottom right of the panel.

Sidebar:

- Header:** BWL Admin Admin Help Logout
- Search Bar:** A search icon with a magnifying glass.
- Library:** A list of items, with the first item, "+ Automate a Process", highlighted with an orange border.

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Figure 1-30. Automate a process

The **Automate a Process** icon is also on the Library page. This function allows users to create automated processes, also known as process applications. These small workflow or automated processes provide quick solutions to process problems that require structure and visibility. For this course, the automated processes are not covered.

The screenshot shows the IBM Training Community page. At the top, there's a blue header bar with the 'IBM Training' logo on the left and the 'IBM' logo on the right. Below the header, the word 'Community' is prominently displayed in a large, bold, dark blue font. The main content area has a light gray background. At the top of this area, there's a navigation bar with tabs: 'Work' (highlighted in blue), 'Community' (which is the active tab and has a red border around it), and 'Library'. To the right of the tabs, there are links for 'BWL Admin', 'Admin', 'Help', and 'Logout'. A search bar with the placeholder 'search' is located on the far right. On the left side, there's a sidebar with a vertical list of 'QUICK LINKS': 'All Activity', 'Followed Items ★', 'Posts', 'Processes', 'Decisions', 'Policies', 'Spaces', and 'My Tasks'. The 'Community' section itself is divided into two main sections: 'PRIVATE ACTIVITY STREAM' on the left and 'PUBLIC BPM STREAM' on the right. The 'PRIVATE ACTIVITY STREAM' section has a heading 'PRIVATE ACTIVITY STREAM' and includes filters for 'Date' (set to 'Yesterday'), 'User', 'Process', and 'Space'. It also has buttons for '+ New Post', 'Expand All', and 'Collapse All'. Below these filters, there's a dropdown menu showing 'Yesterday'. Underneath, there are three entries, each with a user icon and a timestamp. The first entry is from 'BWL User2' at 10:04 PM. The second is from 'You' at 11:51 AM. The third is from 'BWL User2' at 1:20 AM. The 'PUBLIC BPM STREAM' section has a heading 'PUBLIC BPM STREAM' and a message stating 'There are no public messages to display.'

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Figure 1-31. Community

The next IBM Blueworks Live account interface is the Community page. The Community page provides two types of platforms for users:

- **Private Activity Stream.** This specific account activity summary includes a review of activities that are accomplished in the account on a specific date, or by a specific user. Activities that are completed in a space are shown on the **Space** tab, while the activities completed in a process are shown on the **Process** tab. For collaboration on either spaces or processes, users can post feedback during the project iterations. The posts are shown on the **Space** or **Process** tabs.
- **Public BPM Stream.** This platform is a public BPM community stream of blog entries, twitter feeds, and other social media feeds that pertain to business process management. Like the Work page, on the Community page a user with account administration or ascribed permission can click the **Blueprint a Process** or **Automate a Process** icon.

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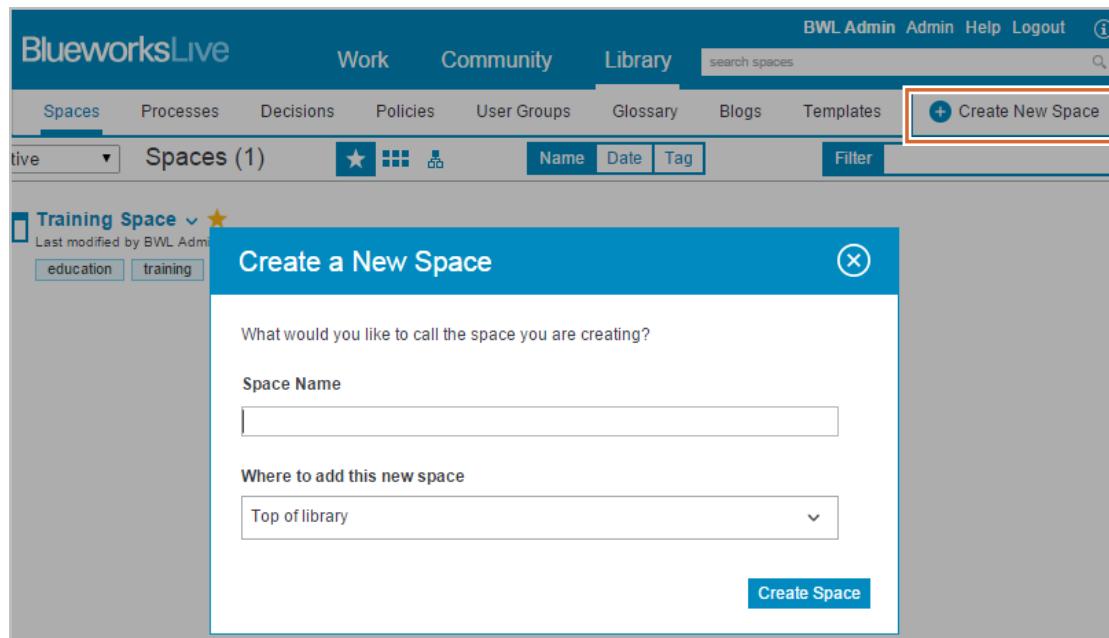
Figure 1-32. Library

The last interface that is part of a Blueworks Live account is the Library page. The Library page is an extensive repository for all the account spaces, processes, policies, glossary, blogs, and templates. Users open the Library page to find specific items in the account by searching on each category tab. On the **Space** tab, a user can also click the **+ Create a New Space** icon to create a project. On the **Processes** tab, a user can also click either the **Blueprint a Process** or the **Automate a Process** icon to create a process. On the **Policy** tab, a user can also click the **+ Create a New Policy** icon to create a policy for the account use.

For more information about using and managing the Library, sign up for the ZB030: *IBM Blueworks Live Account Management* course.

IBM Training

Create a space in the account



- Spaces are projects that are containers for blueprint and automated processes

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Figure 1-33. Create a space in the account

As mentioned before, a space is a project in an account that is a container for specific blueprint and automated processes. An organization should define a standard for naming spaces in Blueworks Live. The space name should be meaningful because it generally contains several processes. One common convention is to name spaces by functional area in an organization; for example, "Finance", "Marketing", or "Sales". The other convention is by geographical location; for example, "Southwest" or "EMEA". Which is chosen is based largely on the structure of the organization.

Factors to consider are:

- How is your organization structured and managed?
- How much reuse is there of processes within a particular function versus within a geographical location?
- Are there security or legal considerations that would cause individuals within a certain function or geographical location to require restricted access to their processes?
- How would your audience likely "browse" for processes? Do they view a process as being associated with a particular functional area more than with a particular geographical location?

For this example, the user's task is to create a repository for all of the HR department processes. The user clicks the **+ Create a New Space** on the **Space** tab in the Library. In the **Create a New Space** dialog box, the user types in **HR Department** and then clicks the **Create Space** icon to

complete adding the new space to the account. When the space is created, it is time to modify the space details and add user permissions.

The screenshot shows the BluworksLive interface for the 'Training Space'. At the top, there's a navigation bar with 'IBM Training' on the left and the IBM logo on the right. Below the navigation bar, the title 'Space details' is displayed. The main content area is titled 'Space Details' and includes an 'ACTIVITY STREAM' section with a 'New Post' button and a 'User' filter. To the right, there's a 'Process Blueprints' section listing two items: 'Claims Payment' and 'Hiring Requisition', each with a star rating and a last modified date. The bottom of the page features a footer with the IBM logo, terms of use, and a link to invite new users.

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Figure 1-34. Space details

When the space is created, the default page for the space is shown. A user can populate discreet information about the space in this page, set standards for the space, and start to add collateral items such as blueprint processes. Notice that the new space *HR Department* is now part of the overall account spaces. This space means that it is listed on the Library repository page for the account. A quick way to access the space for a user is to click the star next to the name. This click changes the star to a different color that indicates that it is now part of the **Items I'm Following** tab on the Work page.

A user can also add tags for a quick search of the space. These two functions in Bluworks Live allow users to quickly access a space in an account when it becomes heavily populated with spaces.

The screenshot shows the 'Space users' page for the 'Training Space'. At the top, there's a header with the space name, a star rating, and an 'Edit Tags' button. Below the header, a navigation bar has 'Users' selected. A descriptive note below the table explains the purpose of the permissions list. The main section is titled 'PARTICIPANTS' and contains a table with columns for Type, Name, Blueprint Processes, Automate Processes, Compose Decisions, Author Policies, Manage and Edit Space, and Remove. It lists four groups: 'BWL Admin', 'All Editors', 'All Contributors', and 'All Community'. Each row includes a small icon representing the user type (e.g., person, group) and checkboxes for each permission category.

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

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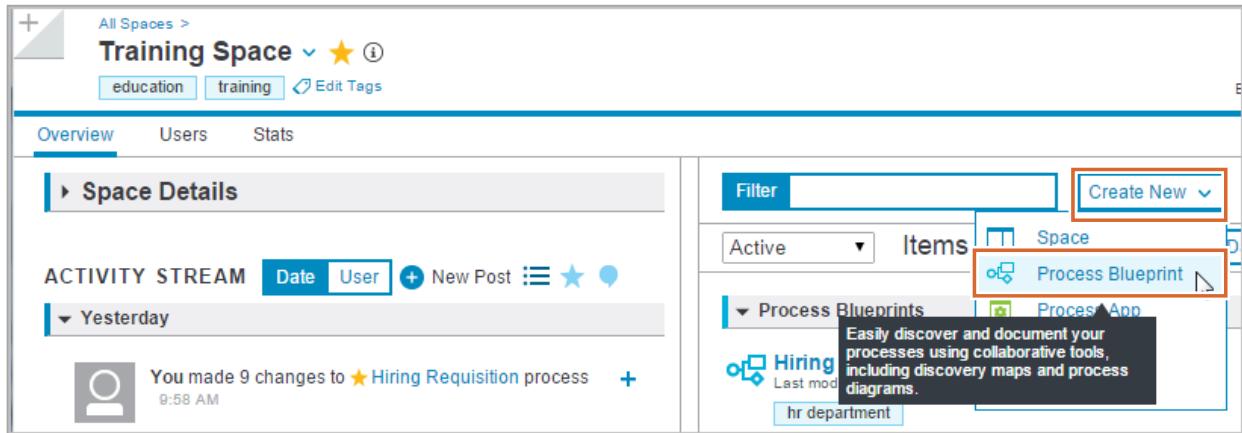
Figure 1-35. Space users

To add or modify user permissions for a space, the user clicks the **Users** tab. On this page, a table shows all the default users for the space, including the user who created the space. New users that are added to the account can be added to the space when the user clicks the blue **Add** icon. This addition brings up an account participant list of all the names of users available. The user clicks the name to add to the space and then selects what permissions to grant the new space user.

To learn more about managing a space in Blueworks Live, sign up for the ZB030: *IBM Blueworks Live Account Management* course.

IBM Training

Create a blueprint process in the space (1 of 2)



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Figure 1-36. Create a blueprint process in the space (1 of 2)

This course is about creating a process discovery map and process diagram or model in IBM Blueworks Live. The purpose of process discovery and process diagram is to accomplish both the descriptive and analytical modeling phases in Playback zero. Descriptive modeling requires the user to create a blueprint process in the space provided. The user clicks the **Create New** icon on the **Overview** tab of the *HR Department* space and then selects the **Process Blueprint** option from the menu.

The screenshot shows the BluworksLive application interface. At the top, there's a blue header bar with the text "IBM Training" on the left and the IBM logo on the right. Below this, the main interface has a dark header with "BluworksLive" and navigation links for "Work", "Community", and "Library". A search bar is also present. The main content area shows a "Training Space" with a "Space Details" sidebar. A central modal dialog box titled "Blueprint a Process" is open. It contains a text input field for "Process Name" with the value "Expenses Reimbursement". Below the input field is a note: "Select Create to start blueprinting your process." At the bottom of the dialog is a blue "Create" button. To the right of the dialog, there's a sidebar with options like "Export Space", "Create New", "Import", "Date", and "Tag". At the bottom of the screen, there are two other items listed: "Hiring Requisition" and "hr department".

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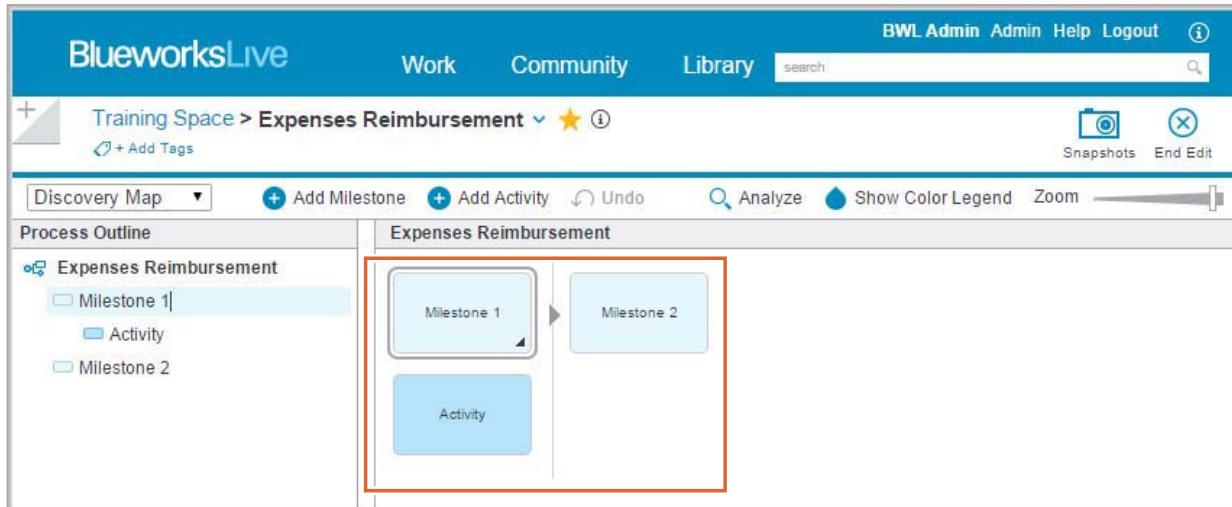
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Figure 1-37. Create a blueprint process in the space (2 of 2)

When a user selects the **Process Blueprint** option from the menu, a **Blueprint a Process** dialog box is shown. In this example, the user types in the new process name: **Expense Reimbursement**. To complete the creation of the blueprint process, the user clicks the **Create** icon. The new process becomes part of the processes that can be accessed in the account repository for processes or through the **HR Department** space.

IBM Training

Blueprint process



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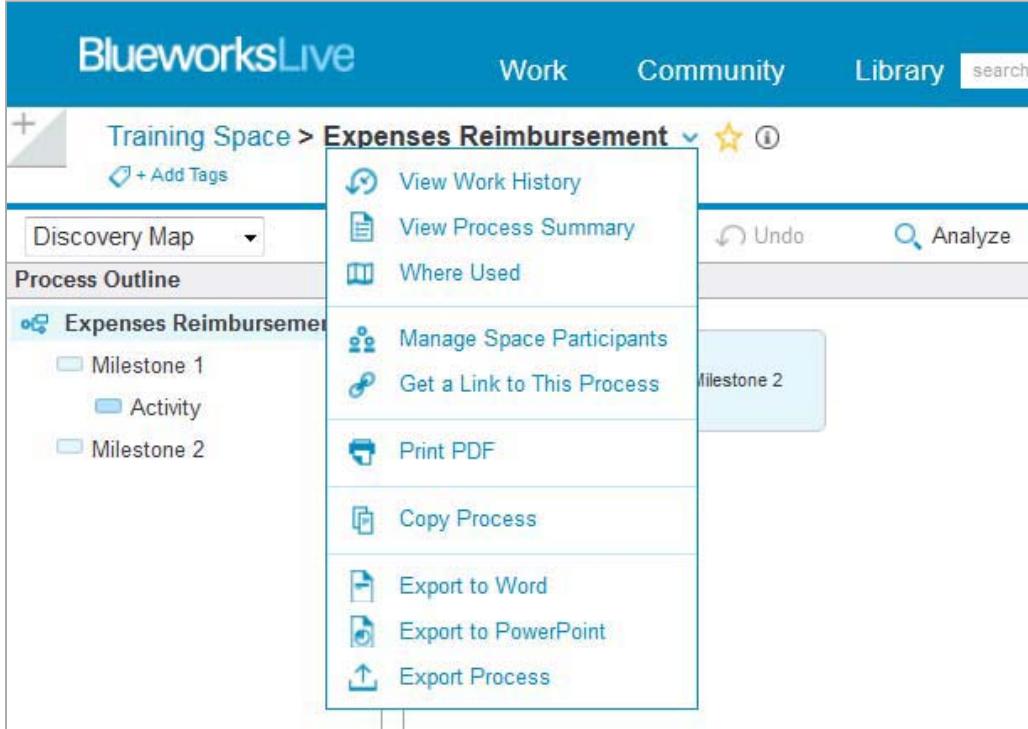
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Figure 1-38. Blueprint process

With the new blueprint process, the user begins the descriptive modeling effort with a newly created discovery map. Because the blueprint process is part of a space that is being followed, the process is now part of the **Items I'm Following** tab on the Work page. Notice that the Expense Reimbursement process is set up with a default set of milestones and one activity in the discovery map. This setup is the default in Blueworks Live for all blueprint processes.

IBM Training 

View or Action for this process



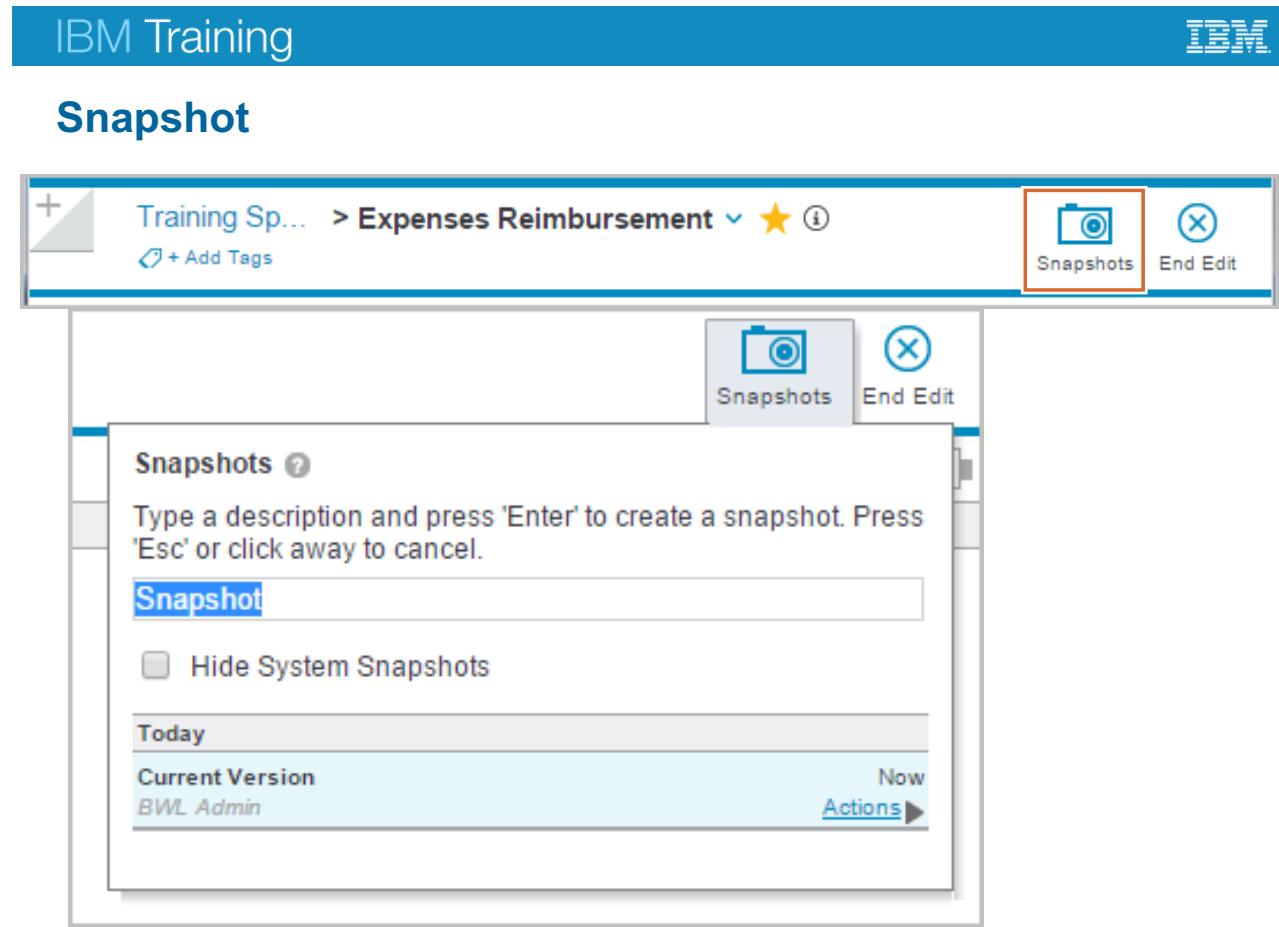
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Figure 1-39. View or Action for this process

The following actions are available for the process:

- View Work History:** Use this option to view a history of your work.
- View Process Summary:** Use this option to view process summary, which includes business owners, description, inputs and outputs, events, problems, linked processes, policies, and decisions.
- Where Used:** Use this option to list the spaces, activities, and processes where this element is used.
- Manage Space Participants:** Use this option to define the people and roles that can participate in this space and with the items it contains.
- Get a Link to This Process:** Use this option to allow user to send the link to others to view the process.
- Print PDF:** Use this option to create a PDF file for the process.
- Copy Process:** Use this option to copy a process diagram from one space to another in the same account.
- Export to Word:** Use this option to create a word document from the process.
- Export to PowerPoint:** Use this option to create a PowerPoint file from the process.

Export Process: Use this option to export to Microsoft Excel, XML Process Definition Language (XPDL 2.1), Business Process Model and Notation (BPMN 2.0), or IBM WebSphere Business Modeler XML V7.0.



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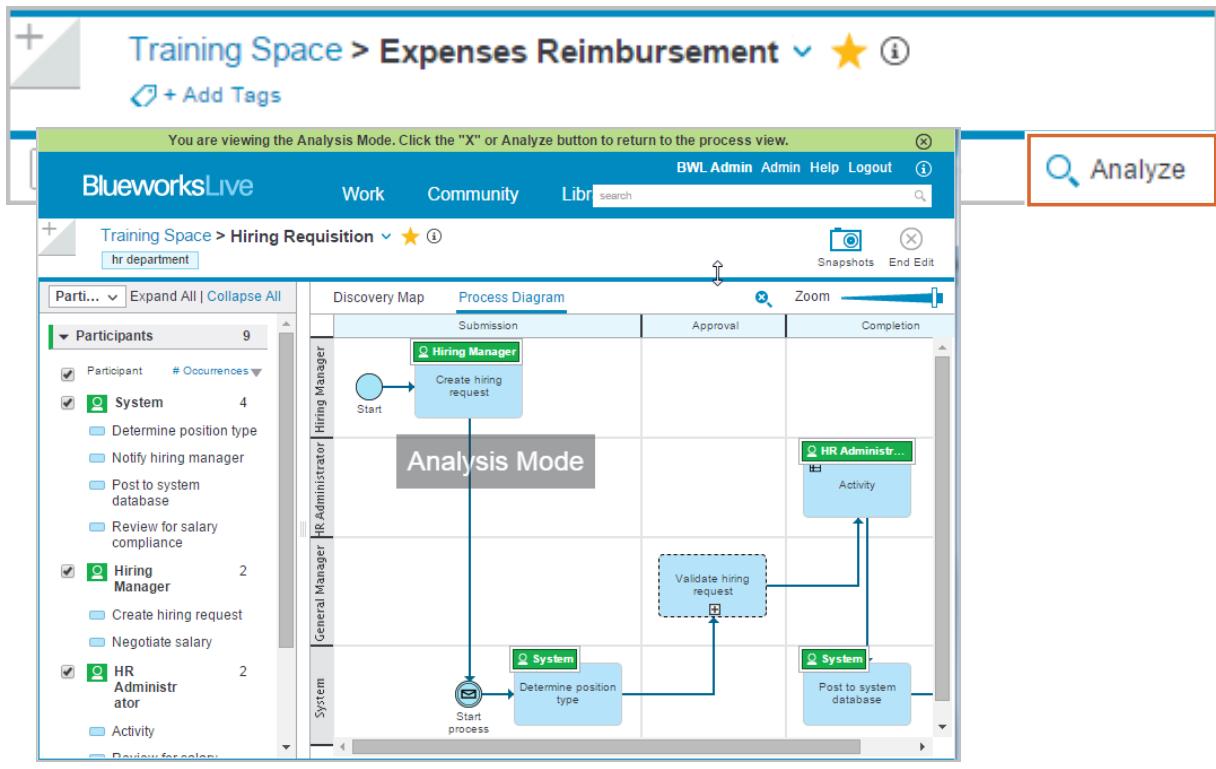
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Figure 1-40. Snapshot

Snapshot is a function in Blueworks Live that allows users to capture a development state for the discovery map or process diagram. Snapshots are stored in the *Revision History* in the lower area of the interface. Apart from user designated snapshots, IBM Blueworks Live also automatically saves snapshots of the development at predesignated cycles. Snapshots allow a user to freeze a development state, while collaboration with other users alters the discovery map or process diagram to test improvements before they are implemented.

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Analyze



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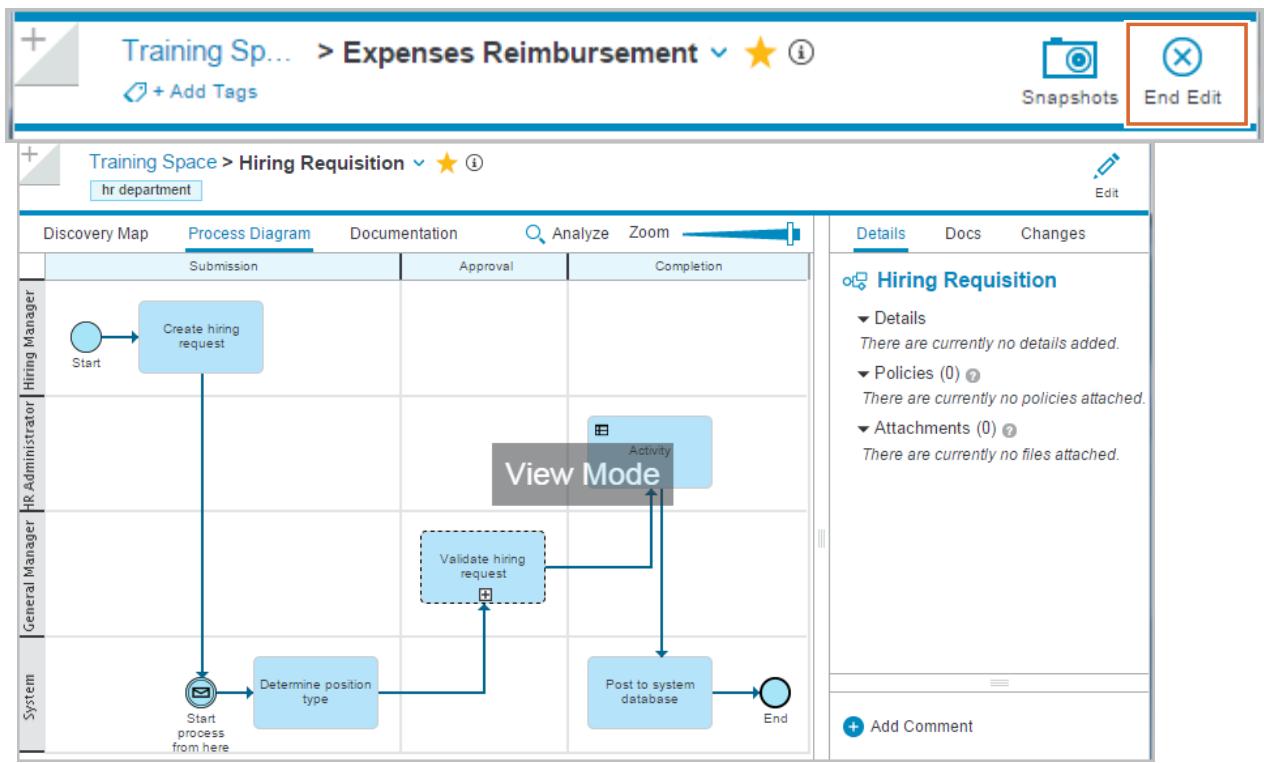
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Figure 1-41. Analyze

The Analyze function allows a user to instantly change the mode from development to analysis. Analysis provides a series of details to check in the entire discovery map or process diagram. Rather than search activities and milestones details individually, the Analyze function provides the entire view of specific details in the map or diagram.



End Edit (1 of 2)



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Figure 1-42. End Edit (1 of 2)

The End Edit function allows a user to lock the blueprint process development at its current state. Freezing the edit mode on the blueprint process allows account and space contributors to provide feedback.

The screenshot shows a web-based application interface for IBM Training. At the top left is the "IBM Training" logo, and at the top right is the "IBM" logo. Below the header, the title "End Edit (2 of 2)" is displayed in large blue text. The main content area has a blue header bar with the text "BWL Admin Admin Help Logout" and a search bar. A blue "Edit" button is located in the top right corner of this bar. The main content area is titled "Hiring Requisition". It features three tabs: "Details" (which is selected), "Docs", and "Changes". Under the "Details" tab, there is a section titled "Details" with the sub-section "Policies (0)". Another section titled "Attachments (0)" is also present. At the bottom of the main content area, there is a red-bordered button labeled "Add Comment" with a plus sign icon.

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Figure 1-43. End Edit (2 of 2)

Users with a Contributor status and who have space permission can provide feedback on blueprint processes that are in a non-edit mode. Contributors click the **Add Comment** icon to type in change requests and feedback on the blueprint process.

Exercise 1: Creating an IBM Blueworks Live space and blueprint process

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Figure 1-44. Exercise 1: Creating an IBM Blueworks Live space and blueprint process

Exercise 1: Create an IBM Blueworks Live space and blueprint process. In this exercise, you create a space in Blueworks Live and a blueprint process for the space.

Exercise objective

After completing this exercise, you should be able to:

- Create an IBM Blueworks Live space and blueprint project

Unit summary

- Describe business process management (BPM)
- List the components of a BPM project
- List and describe BPM Project Team members
- List and describe the Process Modeling phases
- Describe how IBM Blueworks Live fits in Process Modeling

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Figure 1-46. Unit summary

Review questions

1. True or False: Playbacks are based on a waterfall methodology.
2. What are the four phases of the IBM Business Process Manager lifecycle?
 - A. Design, Test, Action, and Deploy
 - B. Design, Modeling, Execution, and Optimization
 - C. Design, Modeling, Execution, and Monitor
3. What are the four stages of Playback 0?
 - A. Requirements, Document, Build, and Refine
 - B. Requirements, Design, Build, and Test
 - C. Capture, Design, Map, and Test
 - D. Capture, Document, Map, and Refine



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Figure 1-47. Review questions

Write your answers here:

- 1.
- 2.
- 3.

Review answers

1. True or False: Playbacks are based on a waterfall methodology.
The answer is False. Playbacks are based on an agile methodology.
2. What are the four phases of the IBM Business Process Manager lifecycle?
 - A. Design, Test, Action, and Deploy
 - B. Design, Modeling, Execution, and Optimization
 - C. Design, Modeling, Execution, and Monitor**The answer is B.**
3. What are the four stages of Playback 0?
 - A. Requirements, Document, Build, and Refine
 - B. Requirements, Design, Build, and Test
 - C. Capture, Design, Map, and Test
 - D. Capture, Document, Map, and Refine**The answer is D.**



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Figure 1-48. Review answers

Unit 2. Playback zero - Process Discovery

Estimated time

01:00

Overview

This unit reviews the process discovery elements and describes how to create a process Discovery Map.

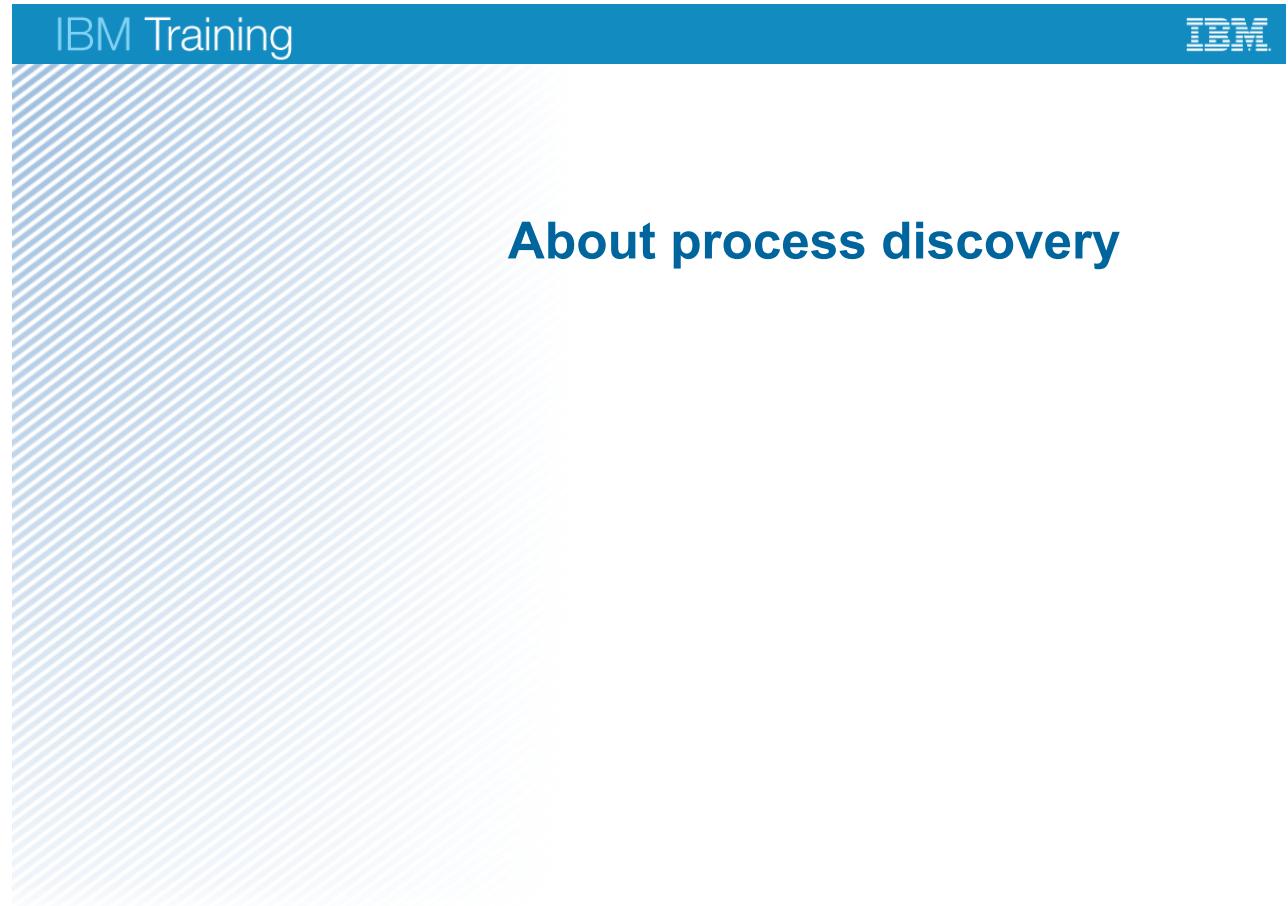
How you will check your progress

- Checkpoints
- Lab exercise

Unit objectives

- 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

2.1. About process discovery



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Figure 2-2. About process discovery

Topic 1: About process discovery

Topics

-  About process discovery
 - Creating a discovery map
 - Capturing process details
 - Change to a process diagram

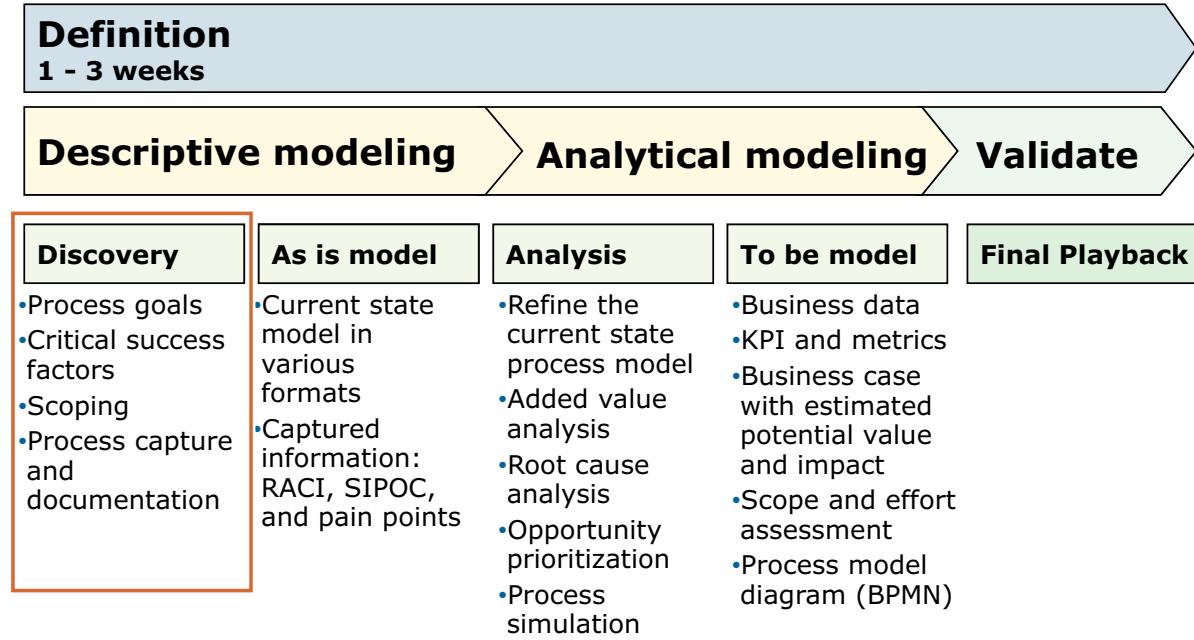
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Figure 2-3. Topics

Overview

Playback zero



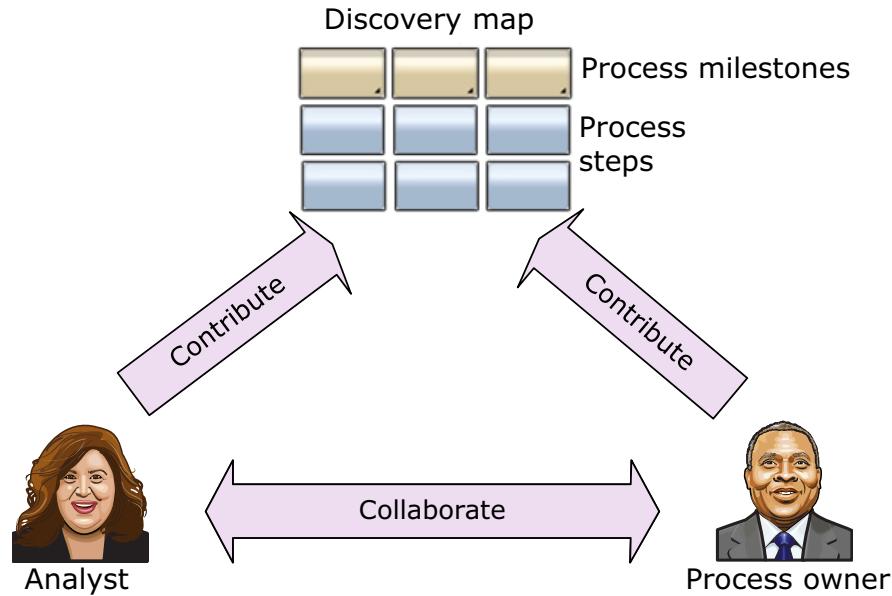
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Figure 2-4. Overview

The goal for descriptive modeling is to communicate the current process across all team members and the organization. What is the process? What is not the process? To accomplish this goal, a process author (or user) first conducts a series of discovery sessions with the business process stakeholders in Blaworks Live. Process discovery is about defining the process goals, the critical success factors, scoping process needs, and a capture and documentation effort of all process details. This effort is about the process definition in its current state and not how it should be improved or modified. Discovery is a “just the facts” effort.

Collaboration



- Document the current state of the business process
- BPM analyst, process owner, BPM project manager

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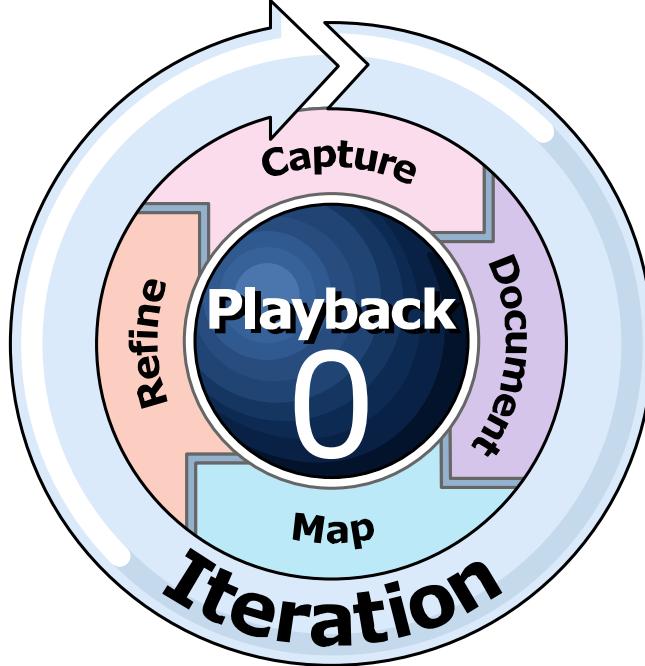
Figure 2-5. Collaboration

The process discovery effort allows for the capture of the process details that translate into the initial process model. The process owners and BPM team members who want to make sure that the current state of the business process is fully documented complete this effort. The BPM analyst is the BPM team member who usually authors discovery maps and process diagrams in Blueworks Live. During discovery, the process details are stored in the blueprint process discovery map. This effort requires a multi-session collaboration between the BPM analyst and the process owner to ensure the capture of every process detail.

To learn more about collaboration sessions in IBM Blueworks Live, see the Blueworks Live help section, Process Modeling 101 online tutorial.



Iteration



- All requirements in Playback zero are iterated, including the model that is finalized for Playback zero validation

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Figure 2-6. Iteration

The strategy that is used to collaboratively gather Playback zero data, especially during discovery, is the iterative phase approach with the following phases:

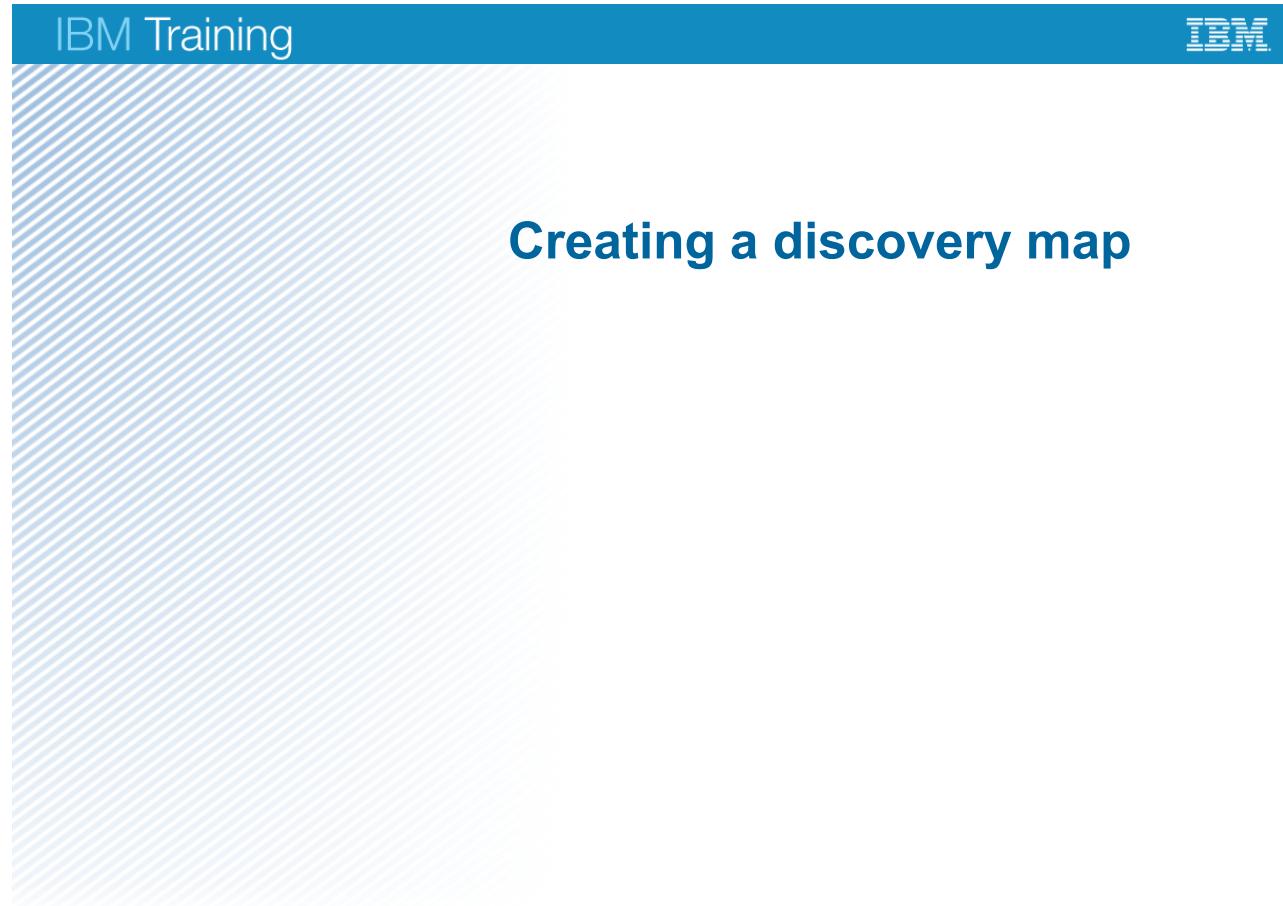
- Capture: In this phase, make sure that the business process information is shared fully.
- Document: In this phase, refine documentation as the analysis continues as there are more stakeholders than just the process owner.
- Map: In this phase, create a discovery map that can clearly define the important information in an easy-to-read manner.
- Refine: In this phase, allow for adjustment to a business process as a clear definition of the business process and process model is incrementally made.

All requirements in Playback zero are iterated, including the model that is finalized for Playback zero validation.

Section recap

- The goal for descriptive modeling is to communicate the current process across all team members and the organization
- Process discovery is about defining the process goals, the critical success factors, scoping process needs, and a capture and documentation effort of all process details
- During discovery, document only the current state of the business process
- BPM analyst, process owner, BPM project manager typically handle process discovery
- The strategy that is used to collaboratively gather Playback zero data, especially during discovery, is the iterative phase approach of capture, document, map, and refine

2.2. Creating a discovery map



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Figure 2-8. Creating a discovery map

Topic 2: Creating a discovery map. This section covers three key areas for creating a discovery map:

- Milestones
- Activities
- Subprocesses

Topics

- About process discovery
- ▶ Creating a discovery map
- Capturing process details
- Change to a process diagram

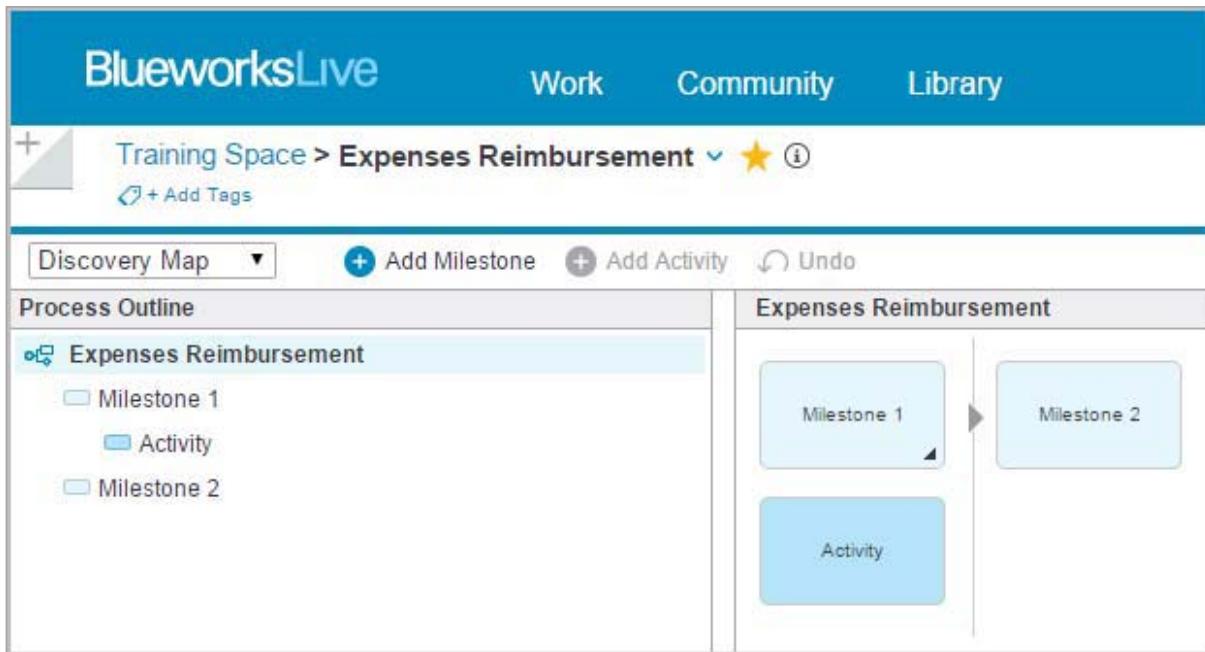
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Figure 2-9. Topics

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Overview



- Milestones, activities, and subprocesses are the elements in a process discovery map

[Playback zero - Process Discovery](#)

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Figure 2-10. Overview

An IBM Bluworks Live discovery map is created by focusing on these elements:

- Milestones
- Activities
- Subprocesses

Each of these elements can be captured during the collaborative process discovery sessions with the process owner and subject matter experts. It is up to the BPM analyst to convert process details that are shared during the discovery session into these elements. The elements can also be extracted from a comprehensive process narrative when one is available. It is important to understand when to map each of these elements and how each relates to the others. More process details are captured as information within each element is discovered.

Discovery map elements and BPMN

Element	Description
	<ul style="list-style-type: none"> • Use a milestone in a discovery map to communicate a particular process phase • Milestones are not a BPMN standard, but an important element in IBM Blueworks Live
	<ul style="list-style-type: none"> • Use an activity to communicate a process task that a single business unit completes • Activity is a BPMN standard
	<ul style="list-style-type: none"> • Use a subprocess to communicate an activity that multiple business units complete • Subprocess is a BPMN standard

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Figure 2-11. Discovery map elements and BPMN

Creating a discovery map is about making sure that the expected order of activities is described. A discovery map is the reason why Business Process Modeling Notation (BPMN) standards are limited in terms of use in descriptive modeling.

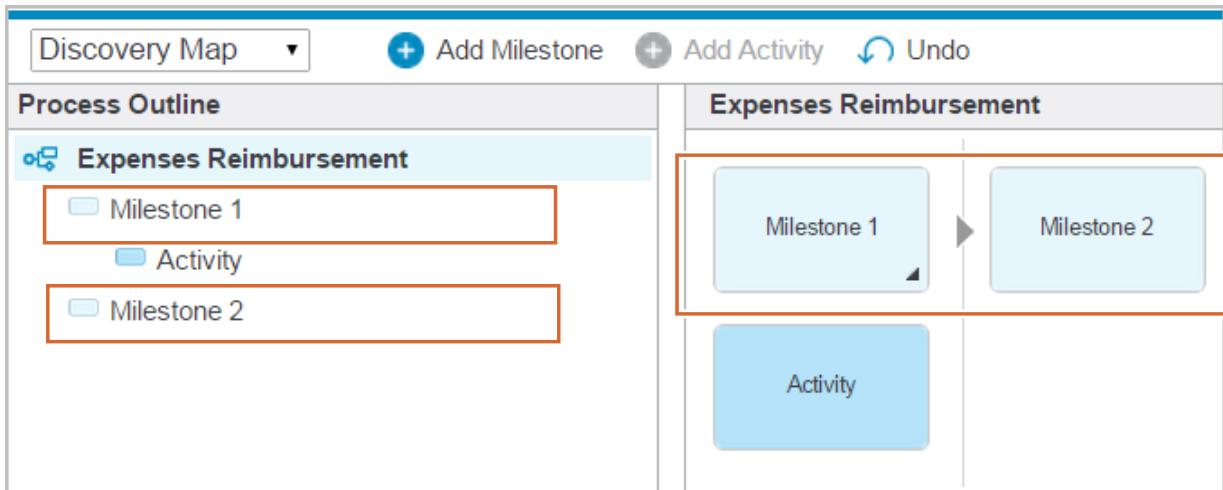
- **Milestone:** Use a milestone in a discovery map to communicate a particular process phase. Milestones are not a BPMN standard, but an important element in IBM Blueworks Live.
- **Activity:** A single business unit completes the activity in a discovery map. Activity is a BPMN standard.
- **Subprocess:** Multiple business units complete the subprocess activity. Subprocess is a BPMN standard.

Eventually, these elements become part of a larger set of BPMN elements in the process diagram, or model, in Blueworks Live.

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Milestones



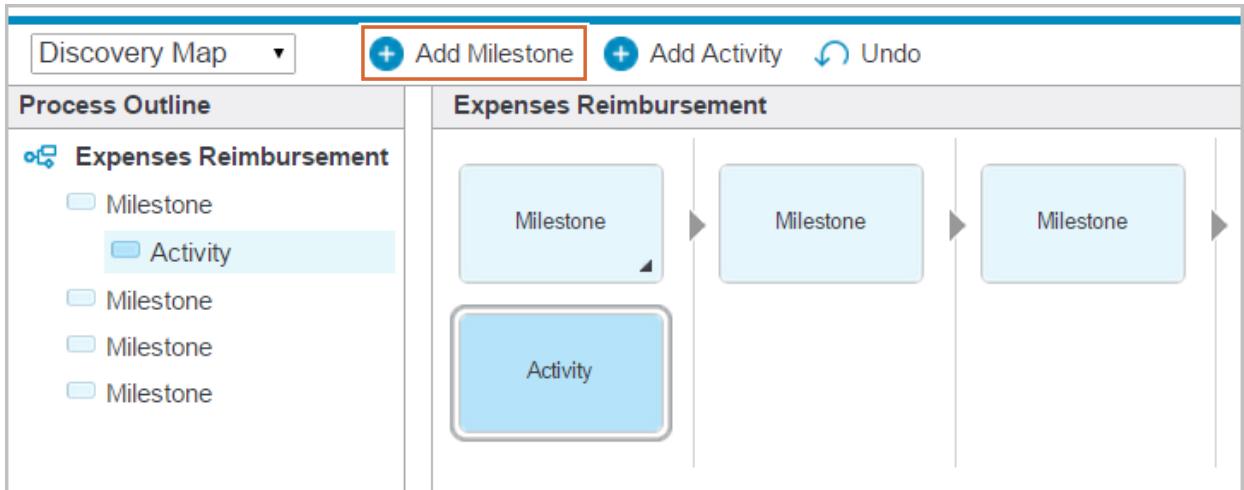
- Milestones are used to define a particular process phase

Figure 2-12. Milestones

For a blueprint process discovery map, a milestone is used to define a particular process phase, representing a change in state or status of the intended process output. For the entire process, milestones are listed in a sequential manner. Milestones consist of a group of activities that are intended to produce a specific deliverable within a time frame.

Early collaboration or review of a process narrative should yield the process milestones. Milestone is the first task to accomplish to create a discovery map.

Milestone example: Expense reimbursement (1 of 2)



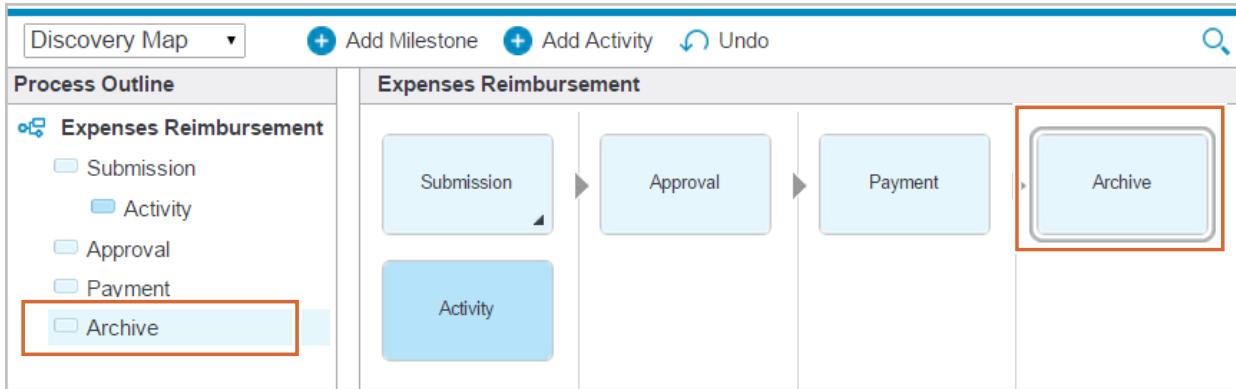
- Click **Add Milestone** to add more milestones

Figure 2-13. Milestone example: Expense reimbursement (1 of 2)

During the initial discovery session, the process owner identifies the phases in the current expense reimbursement process. The first thing the BPM analyst creates is four placeholders for the process phases, or milestones, by clicking the **Add Milestone** icon two times. With the default two milestones, now the discovery map reflects four clear demarcations in the process.



Milestone example: Expense reimbursement (2 of 2)



- Process milestones are arranged in the order in which they are completed

Figure 2-14. Milestone example: Expense reimbursement (2 of 2)

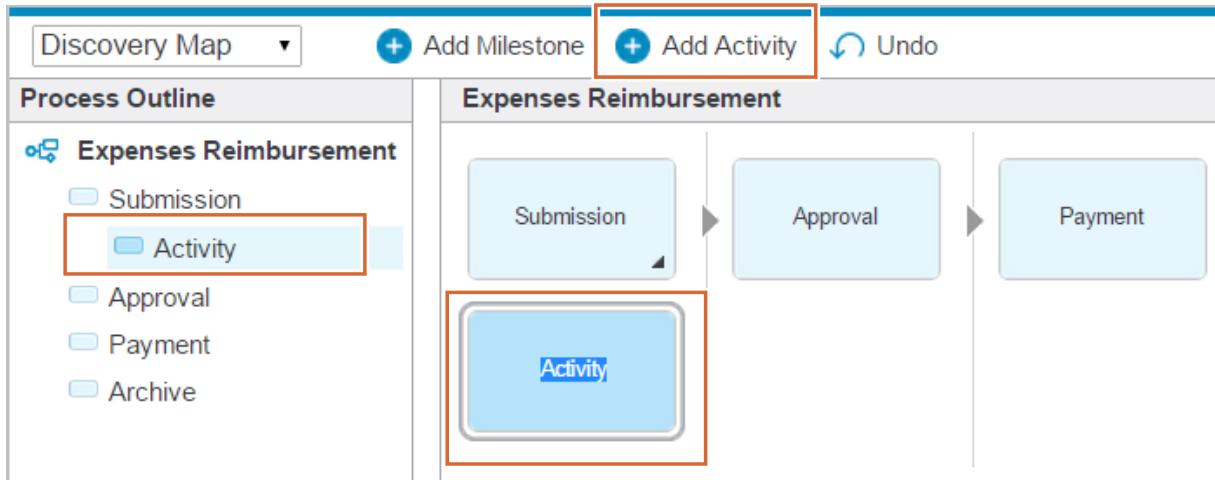
The process owner identifies the expected milestones in the expense reimbursement process as:

- An employee submits an expense reimbursement.
- The finance manager of the HR department approves the expense reimbursement.
- The finance group of the HR department pays out the expense.
- The finance group of the HR department archives the expense reimbursement.

The BPM analyst used nouns to label the milestones in the discovery map. To change the label, the analyst clicks the milestone icon to highlight the text. The analyst then changes the text to reflect the label that is required. Milestones can also be modified in the left pane outline in the same manner. If the sequencing of the milestones is deemed out of order in later discovery sessions, the BPM analyst and process owner can move each milestone icon to different positions in the map. It is important that the milestones are arranged in the order in which they are completed.



Activity



- An activity represents an atomic unit of work that a responsible party in a process completes

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Figure 2-15. Activity

Now that the discovery map milestones are in place, it is time to add the associated activities for each milestone. In process modeling, an activity represents an atomic unit of work, those things that a responsible party in a process does to complete a task. Collaboration with a process owner or information from a process narrative should yield all the process steps that are needed to identify all tasks (activities).

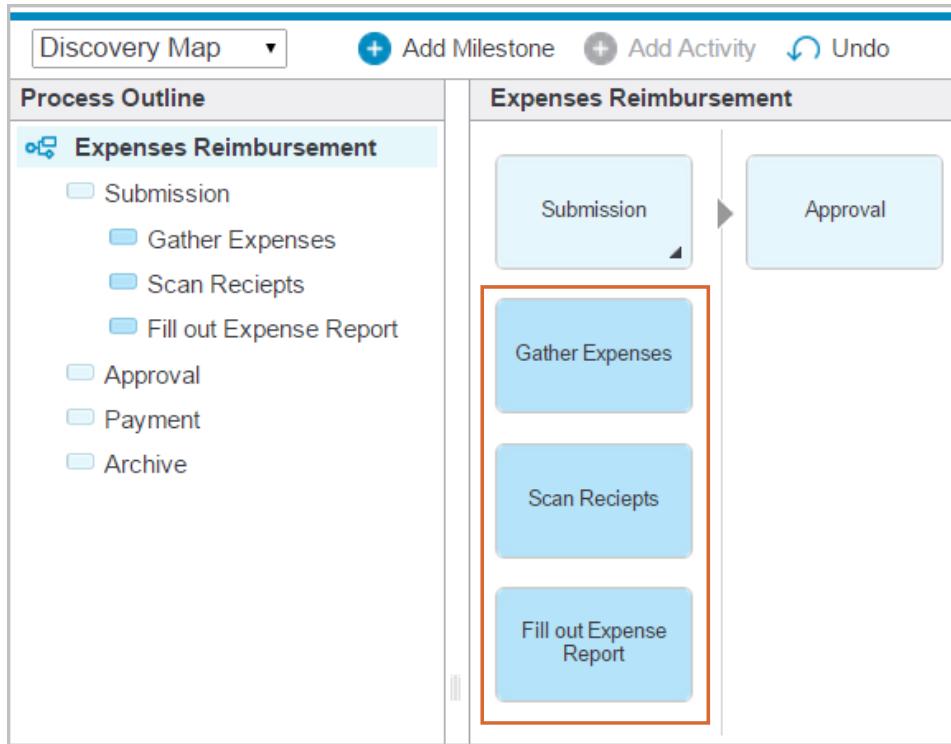
What are steps?

Elaborating on the activities in the discovery map begins with the capture of process workflow steps that are placed under each milestone. Steps are then converted into process tasks. This process does not take a long time to do, but it is necessary to change a step or series of steps into one atomic unit of work, or activity. IBM Blueworks Live is flexible enough to capture the steps first and then allow the process owner and BPM analyst to convert those steps into final activities.

To add activities to the discovery map, the process author clicks the **Add Activity** icon to place more activities under the milestone that is required. The same thing can be accomplished in the left pane outline by placing the cursor after the existing activity and then pressing the Enter key on the keyboard.



Activity example: Expense reimbursement steps



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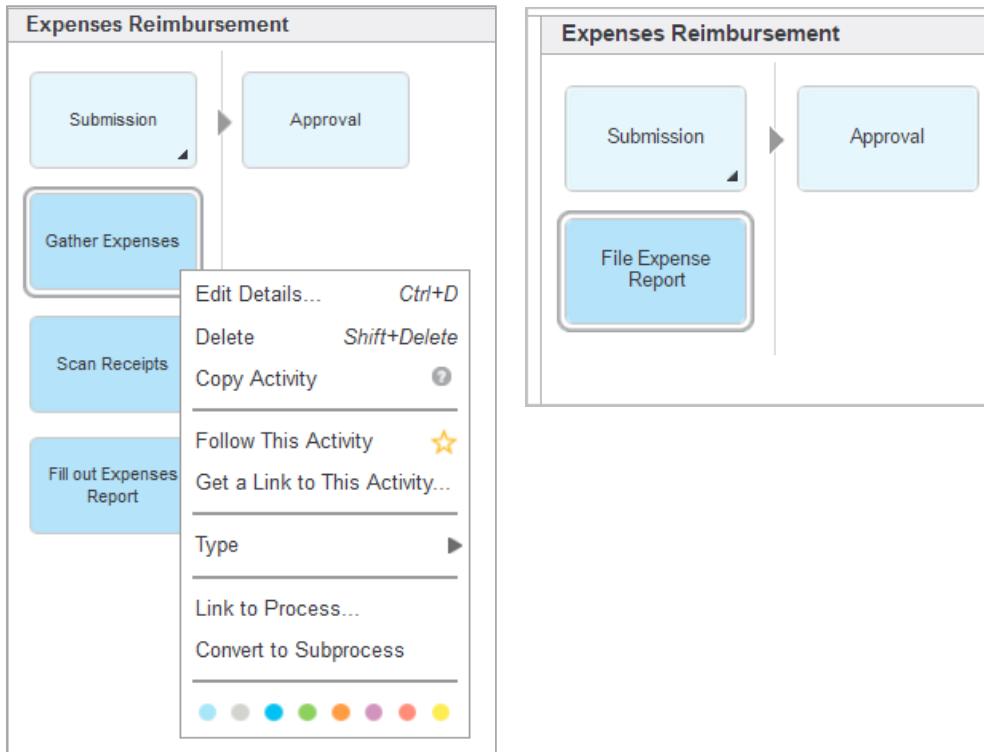
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Figure 2-16. Activity example: Expense reimbursement steps

In the example expense reimbursement process, the process owner outlined the first steps that are undertaken in the submission phase. Notice that the steps are labeled with a verb-noun combination. In a discovery map and process diagram, steps, tasks, and activities are labeled with this combination style. To label the steps, the process author clicks the activity icon to highlight the field and then types in the new label.

These three steps are assigned to the same responsible party in the process, so they are candidates for conversion to a single activity.

Activity example: Expense reimbursement activity



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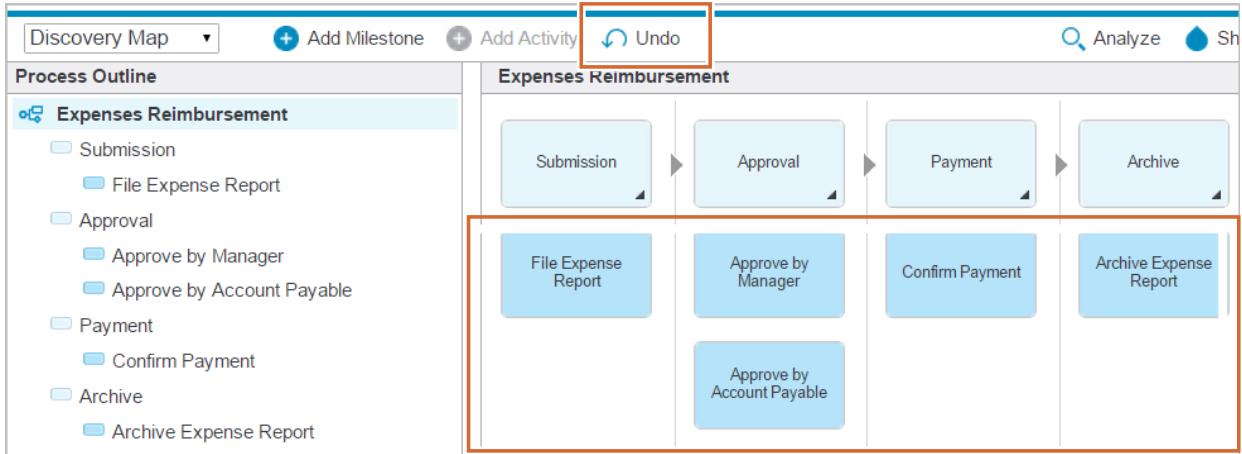
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Figure 2-17. Activity example: Expense reimbursement activity

Since there is no change in ownership from one step to the next, the BPM analyst and process owner collapse the three existing steps into one activity: File Expense Report. To accomplish change to the discovery map, the BPM analyst deletes the last two steps and renames the first step. To delete an activity or step from the discovery map, the process author right-clicks the activity and clicks **Delete**. A process author can also choose to delete an activity by clicking the icon for the activity in the left pane outline and pressing the Shift+Delete keys on the keyboard.



Activity example: Expense reimbursement final activities



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Figure 2-18. Activity example: Expense reimbursement final activities

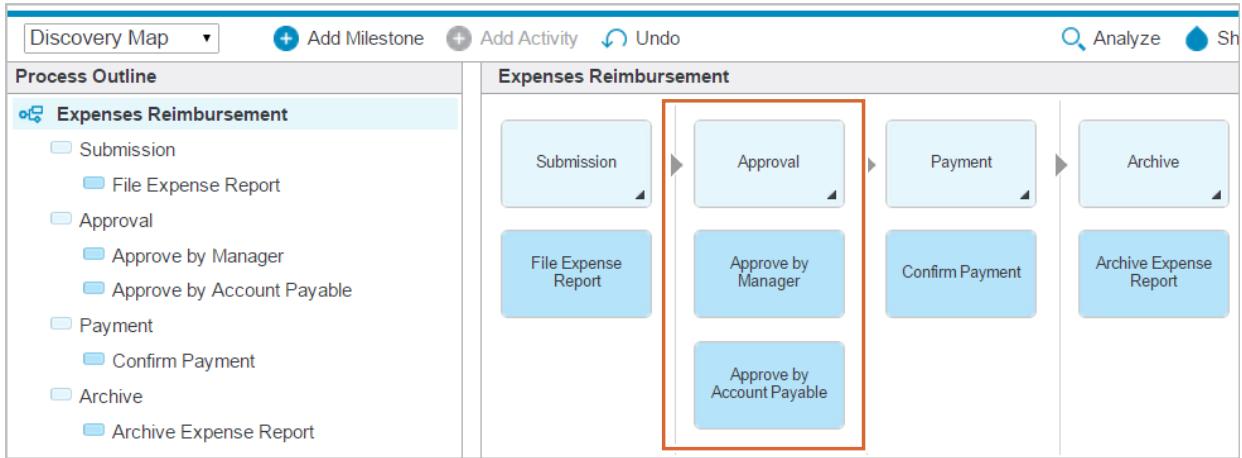
The process owner and BPM analyst continue to collaborate on the process discovery map to refine steps into activities. This refinement happens over a series of iterations until an initial discovery map, complete with milestones and activities, is complete. Notice that if at any time process owners or BPM analysts want to revert to a previous state of the discovery map, they can click the **Undo** icon. Undo reverts the discovery map back one edit at a time.

The goal up to this point in the collaboration is to list the milestones and activities in a sequential manner that follows an order of accomplishment. At this stage, the lack of detail, such as who and when in the process discovery map, is deliberate. Right now, the intent of the process map is to provide visibility into what the business process is, without regard to any conditions or exceptions that occur in a process.

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Subprocess



- A subprocess is an activity that different business units complete

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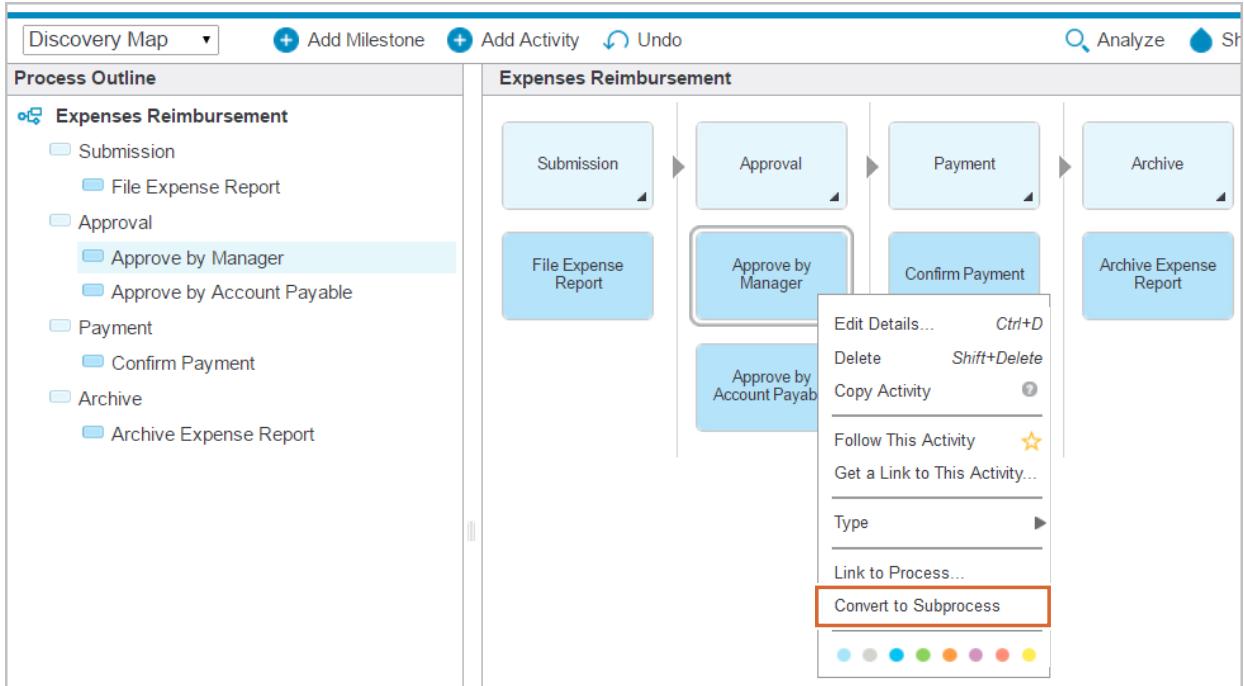
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Figure 2-19. Subprocess

Another activity type in a discovery map is the subprocess. A subprocess activity is a set of tasks that are assigned to multiple business units. The Approval milestone has two approval activities. These two activities are good candidates to consolidate into a subprocess.



Subprocess example: Expense reimbursement (1 of 3)



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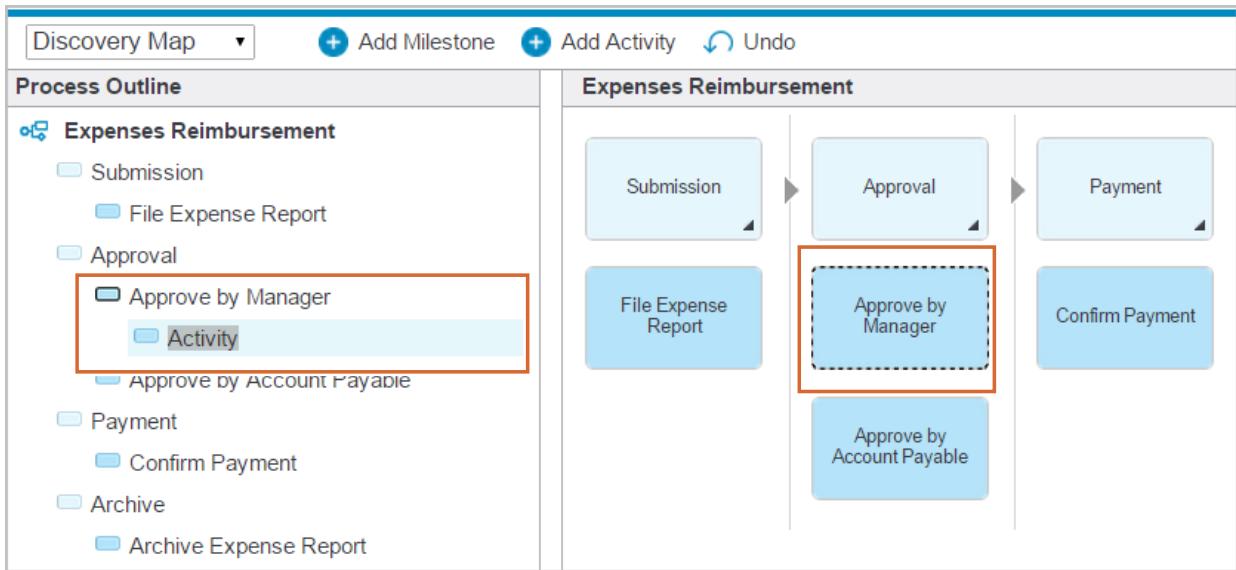
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Figure 2-20. Subprocess example: Expense reimbursement (1 of 3)

To convert the activities in the Approval milestone into a subprocess, the process author right-clicks the first activity and clicks **Convert to Subprocess**.



Subprocess example: Expense reimbursement (2 of 3)



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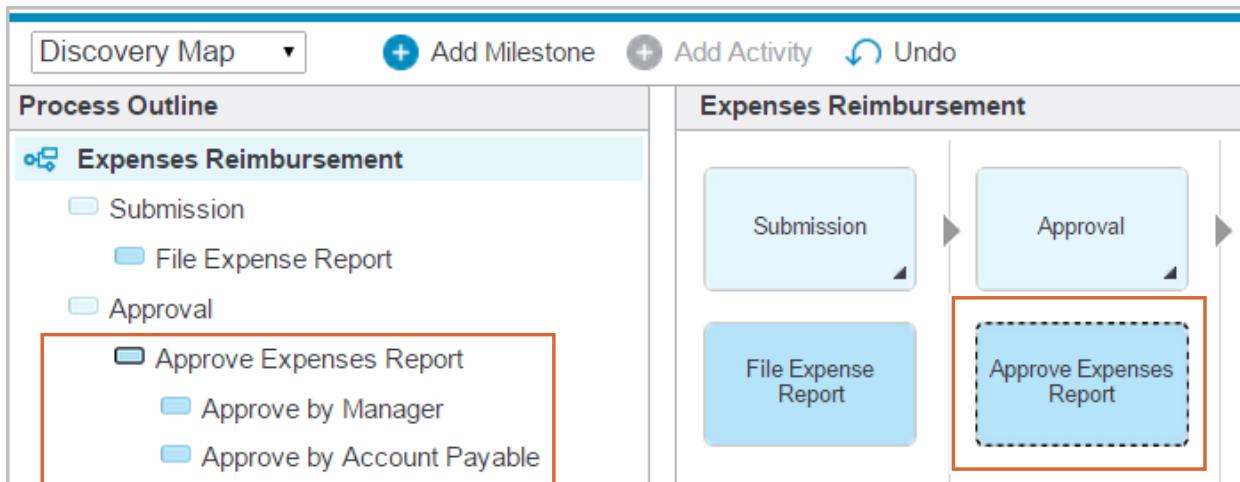
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Figure 2-21. Subprocess example: Expense reimbursement (2 of 3)

Notice that the activity changed to a dashed line rectangle. This dashed rectangle is a subprocess in the discovery map. In the left pane outline, a new activity is automatically added to the subprocess to show the parent-child relationship clearly. The process author highlights the label for the new activity and changes it to *Approve by Manager*. The subprocess activity label is also changed to *Approve Expense Report*.



Subprocess example: Expense reimbursement (3 of 3)

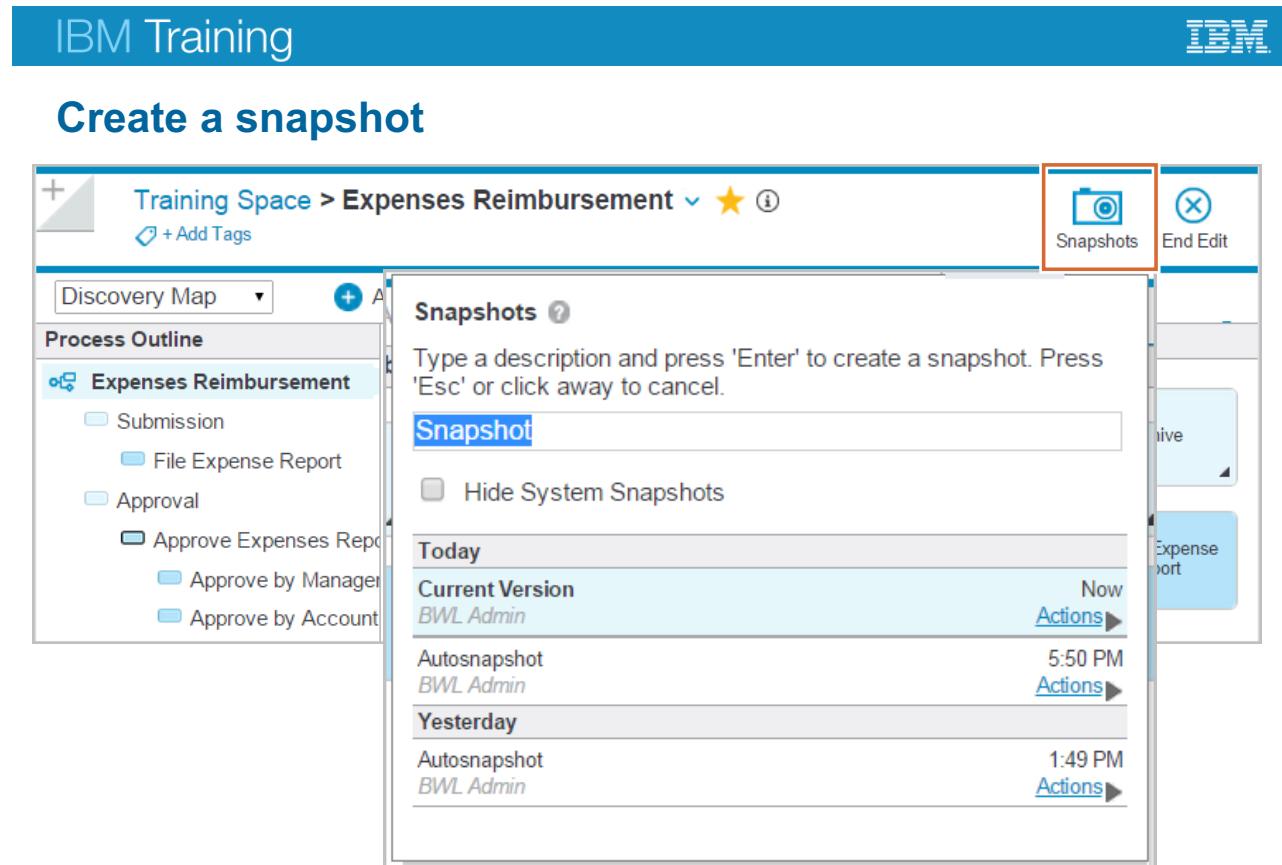


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Figure 2-22. Subprocess example: Expense reimbursement (3 of 3)

To complete the conversion of the two activities into one subprocess, click and drag the Approve by Accounts Payable activity in the left pane outline. Release the activity icon when it is situated beneath the Approve by Manager activity in the outline. This effort completes the first task in descriptive modeling, creating a discovery map of the “as-is” process.



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Figure 2-23. Create a snapshot

After the initial discovery map for the expense reimbursement process is completed, the process author decides to take a snapshot of the blueprint process development. The author clicks the **Snapshot** icon at the top of the interface. In the dialog box that is shown, the process author types in the description to identify the process state for the snapshot. The process author then presses the Enter key on the keyboard to save the snapshot.



Revision history

Snapshots

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

Taking a snapshot enables you to restore a particular version of your process at any time. Click a snapshot from the list to preview. Click **Actions** to restore the snapshot as your current version, to publish the snapshot, or to launch a process app.

Today	Now
Current Version BWL Admin	Actions
Autosnapshot BWL Admin	5:50 PM Actions
Yesterday	
Autosnapshot BWL Admin	1:49 PM Actions

Playback zero - Process Discovery

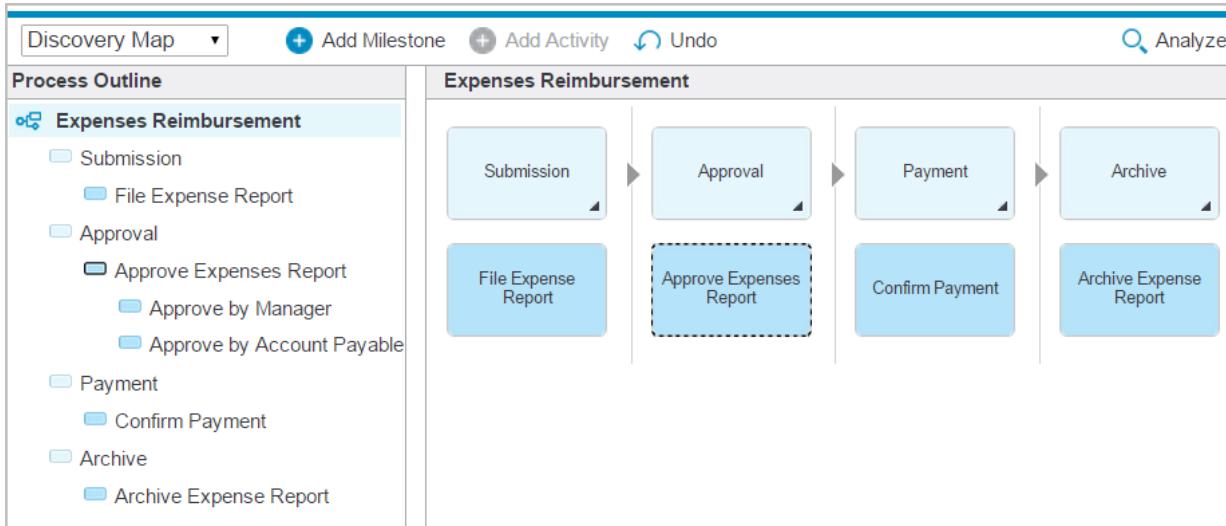
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Figure 2-24. Revision history

The snapshot of the discovery map is now part of the Revision History list at the lower quadrant of the interface. Along with the user-created snapshot is a list of automatically generated snapshots by Blueworks Live. The discovery map snapshot is used as a revert placeholder for the process if future collaboration or edits make mistakes or go too far with revisions.



Modifying the discovery map (1 of 4)



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Figure 2-25. Modifying the discovery map (1 of 4)

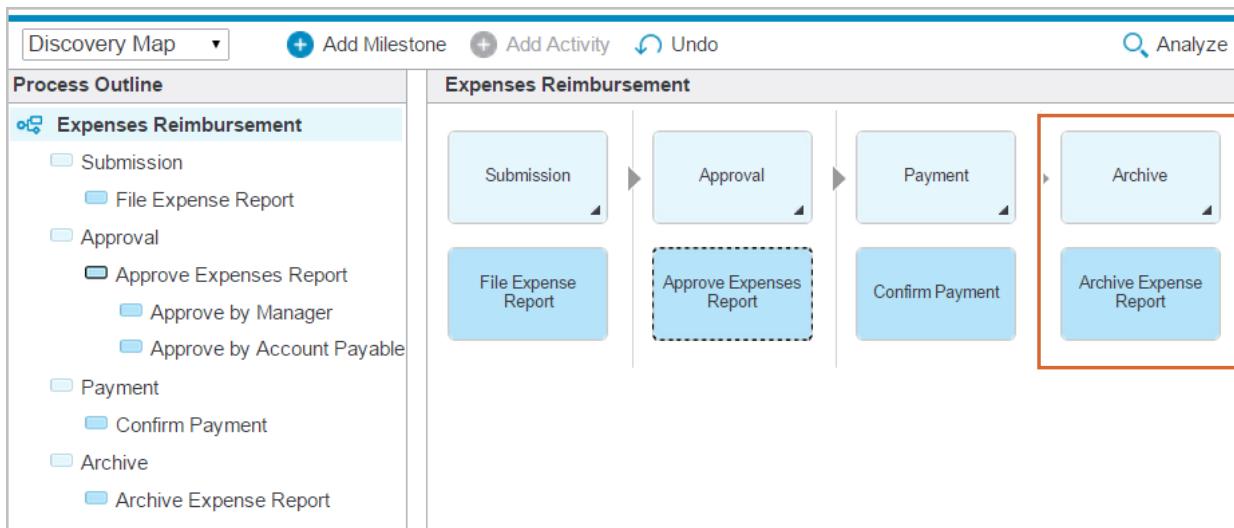
A stated goal of the discovery map is to provide visibility into the essential elements of the business process, without regard to any conditions or exceptions.

- What is the process?
- What is not the process?

The process becomes clearer as the discovery map is modified into a concise diagram of the expected path of the process. Opportunities to improve the discovery map in this regard include modification of any element, including the milestones if necessary. The process owner or project team suggests deleting unnecessary information that hinders the goal of defining only the essential elements of the process.



Modifying the discovery map (2 of 4)



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Figure 2-26. Modifying the discovery map (2 of 4)

In the expense reimbursement process discovery map, the process owner suggests making a final edit to the map. The Archive milestone is not worthy of being part of the discovery map for the process. However, the Archive Expense Report is essential.



Modifying the discovery map (3 of 4)

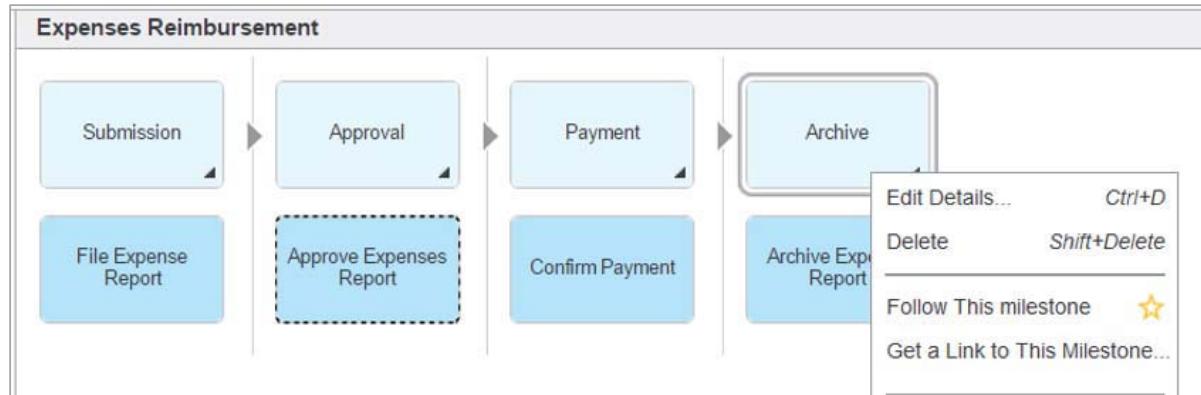


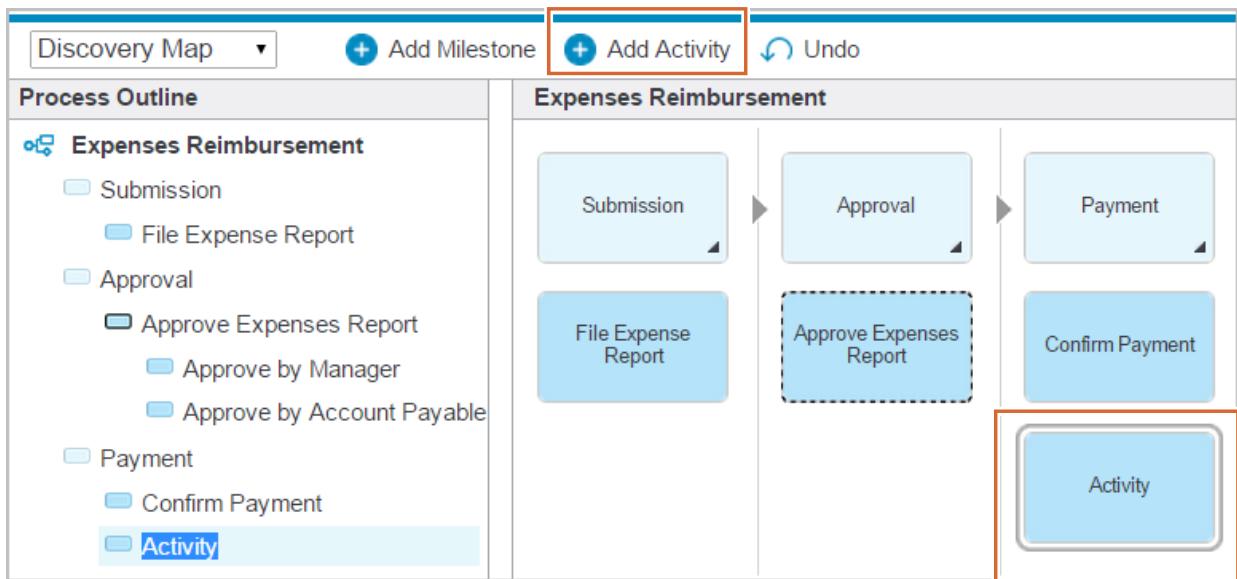
Figure 2-27. Modifying the discovery map (3 of 4)

To delete the Archive milestone, the process author:

1. Right-clicks the Archive milestone.
2. Clicks **Delete**.



Modifying the discovery map (4 of 4)



Playback zero - Process Discovery

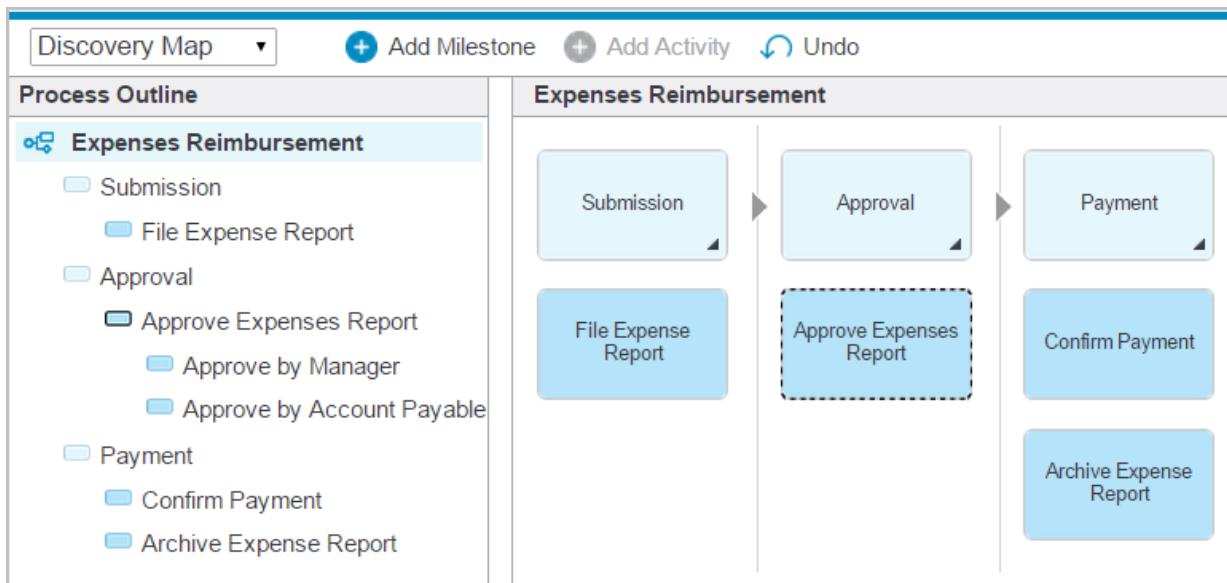
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Figure 2-28. Modifying the discovery map (4 of 4)

With the Archive milestone deleted, the process author clicks one time on the Confirm Payment activity in the Payment milestone. Then, the process author clicks one time on the **Add Activity** icon to add an activity below the Confirm Payment activity.

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Discovery map final edit



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Figure 2-29. Discovery map final edit

The final edit to the discovery map is almost complete. The process author clicks one time on the new activity label and types in Archive Expense Report. Now the discovery map is ready for the next phase of the descriptive modeling effort. The process author completes the final edits by creating a snapshot of the discovery map and naming it Final discovery map.

Section recap

- Discovery maps are made up of milestones, activities, and subprocesses
- Milestones are used to define a particular process phase
- An activity represents an atomic unit of work that a responsible party in a process completes
- Milestones and activities are arranged in a discovery map in the order in which they are completed
- Milestones use nouns to label the icon in the discovery map and process diagram
- Activities use a verb-noun combination to label the icon in the discovery map and process diagram
- A subprocess is an activity that different business units complete

Exercise 2: Creating a Discovery Map

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Figure 2-31. Exercise 2: Create a discovery map

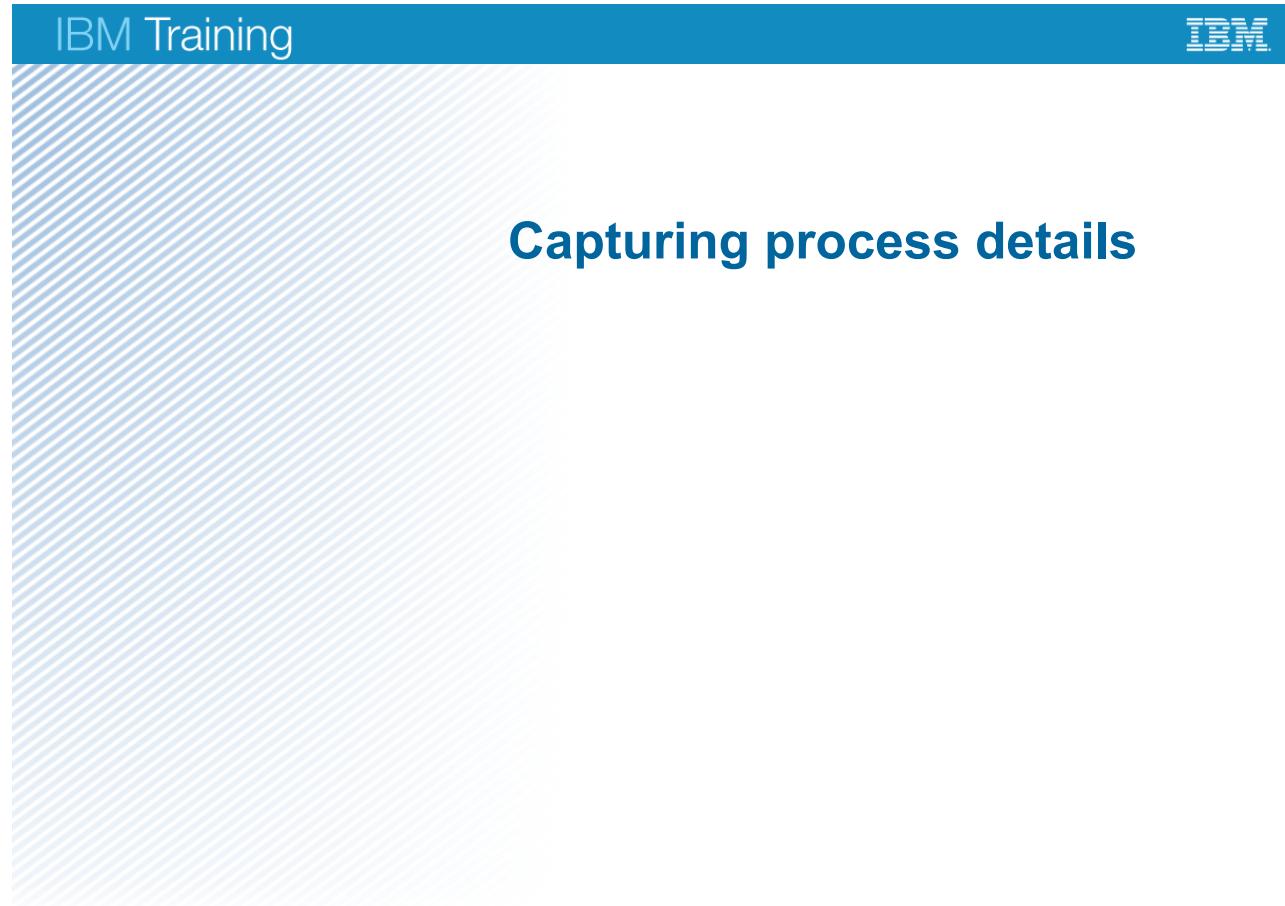
Exercise 2: Creating a Discovery Map. In this exercise, you create a Discovery Map in Bluworks Live.

Exercise objectives

After completing this exercise, a student should be able to:

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

2.3. Capturing process details



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Figure 2-33. Capturing process details

Topic 3: Capturing process details. Another facet of descriptive modeling is the capture of process details in the discovery map. Thus, the focus shifts to:

- Who does what in the process?
- When does a task start and finish?

This section covers the key concepts for capturing the process details in a discovery map.

Topics

- About process discovery
- Creating a discovery map
- Capturing process details
- Change to a process diagram

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Figure 2-34. Topics

Overview

Playback zero

Definition

1 - 3 weeks

Descriptive modeling

Analytical modeling

Validate

Discovery

- Process goals
- Critical success factors
- Scoping
- Process capture and documentation**

As is model

- Current state model in various formats
- Captured information: RACI, SIPOC, and pain points

Analysis

- Refine the current state process model
- Added value analysis
- Root cause analysis
- Opportunity prioritization
- Process simulation

To be model

- Business data
- KPI and metrics
- Business case with estimated potential value and impact
- Scope and effort assessment
- Process model diagram (BPMN)

Final Playback

Playback zero - Process Discovery

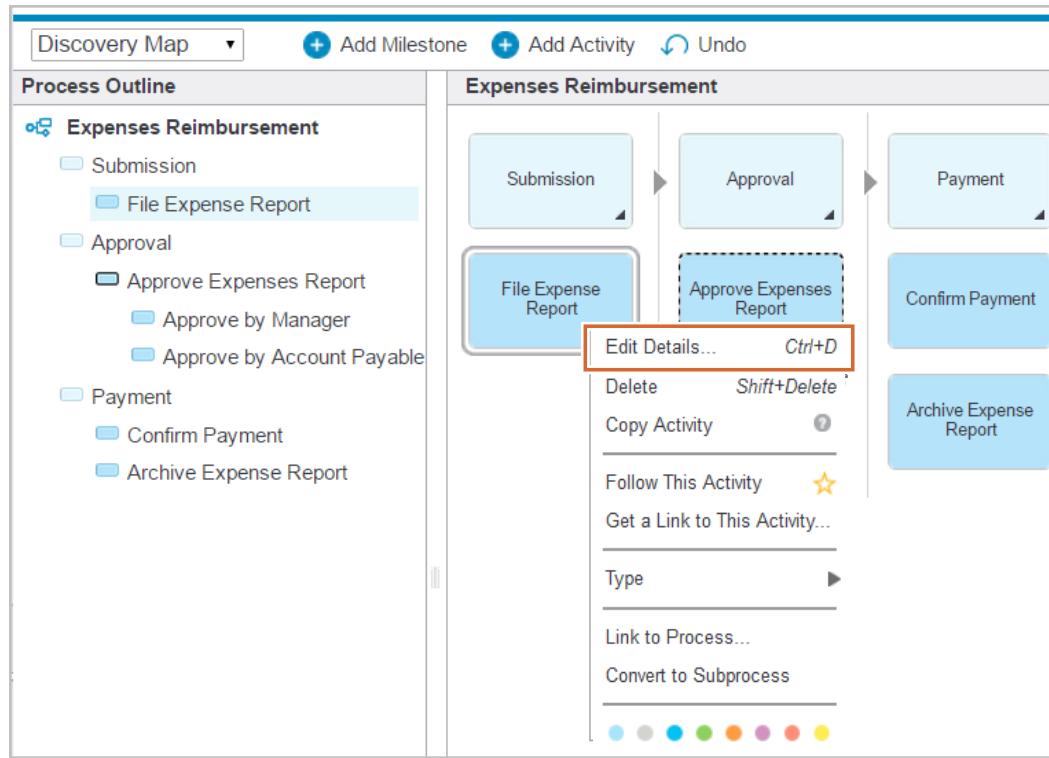
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Figure 2-35. Overview

Capturing process details in the discovery map in IBM Blueworks Live allows for the addition of key information about the process task owners, which are known as participants. Process details also capture other process documentation that is not communicated in the process model. Another goal of descriptive modeling of a discovery map is to reveal problem areas in the process. Problem area capture is accomplished through documentation of the process problem details in Blueworks Live, including the severity and frequency of each problem. Documenting process problems moves the descriptive modeling closer to a process improvement effort in analytical modeling.



Adding details to a discovery map



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Figure 2-36. Adding details to a discovery map

To add details to a discovery map, the process author chooses adding information in the milestone, activity, or subprocess. Some minor changes in the details can be added in each element. For example, the milestone and subprocess do not require process participant details, but they do require business owner information.

To begin adding details, the process author right-clicks the discovery map element and clicks **Edit Details**.

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Categories

File Expense Report ☆

Details	Problems	Policies	Documentation	Attachments	Comments
▼ Participant ⓘ					☆
▼ Business Owners ⓘ					☆ ⏴ ⏵
▼ Experts ⓘ					☆ ⏴ ⏵
▼ Systems ⓘ					☆ ⏴ ⏵
▼ Cycle Time ⓘ	⌚ work time	Minutes ▾	+	⌚ wait time	Minutes ▾

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Figure 2-37. Categories

Adding details to a discovery map element involves six different categories of information. The categories are provided here:

- **Details:** This category adds specific details about the element. For example, if it is the File Expense Report activity in the expense reimbursement process, the details include responsible process task roles. Details also include accountable and consulted process task roles, task inputs, task outputs, systems, and cycle times.
- **Problems:** A process owner wants to talk about problem areas during the descriptive modeling. This category allows the process author to capture those conversations, including listing the severity and frequency of the problem for ranking purposes. Remember to keep the conversation to documenting problems, and not solving them, in modeling.
- **Policies:** Organizations rely on business policies to govern a business process. In Blueworks Live, policies can be added to the account and then applied to multiple elements within a blueprint process and also multiple processes. To learn more about policies in Blueworks Live, sign up for the course ZB030: *IBM Blueworks Live Account Administration*.
- **Documentation:** This category provides any additional documentation for the specific element that is not provided in the Details category.

- **Attachments:** Blueworks Live provides a process author the ability to add file attachments to any discovery map element. To learn more about file management in Blueworks Live, sign up for the course ZB030 or ZB032: *IBM Blueworks Live Account Administration*.
- **Comments:** In this category, process authors can add comments for specific elements that are directed at other contributors and editors who work on the same process.

The screenshot shows the 'File Expense Report' process in IBM Blueworks Live. The 'Participants' section is expanded, showing four categories: 'Participant', 'Business Owners', 'Experts', and 'Systems'. Under 'Participant', there is one entry: 'Employee'. Each participant entry has a yellow star icon and a plus/minus sign for modification.

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Figure 2-38. Process participants

The process author adds details as the discussion with the process owner continues. The participant provides the *responsible role* detail for the activities in a process. Capturing participants in the discovery map is crucial for creating a process diagram later in IBM Blueworks Live.

In the example expense reimbursement process discovery map, the participant that is identified for the first activity is *Employee*. Notice that a participant represents a role and not a particular person. Also, if this process is assigned to a specific group or department, then the participant would be different, such as salesperson. In the same manner, if the process has a wider scope in terms of participants (if, for example, the process includes contract labor and vendors), then the role would probably be an expense submitter.

The screenshot shows the IBM Training interface with the title "File Expense Report". The "Business owners" section is highlighted with a red box. It contains one entry: "HR Manager". Other sections like "Participants", "Experts", and "Systems" are also visible.

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Figure 2-39. Business owners

Business owners are the *accountable* party for the process. The process author can add more than one business owner by clicking the + icon next to the entry box. In this case, the expense reimbursement process has only one business owner of the File Expense Report activity.

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Experts

File Expense Report 

Details	Problems	Policies	Documentation	Attachments	Comments
Participant 	<input type="text" value="Employee"/> 				
Business Owners 	<input type="text" value="HR Manager"/> 				
Experts 	<input type="text" value="Jon Doe"/> 				
Systems 	<input type="text"/> 				

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Figure 2-40. Experts

Adding an expert or experts to the discovery map element details identifies the core subject matter experts that a process author should consult on process details. The process author can click the + icon next to the entry box to add more than one expert. Adding a participant, business owner, and expert detail in one discovery map element automatically adds the entries into the Blueworks Live glossary. Having the entries in the glossary allows Blueworks Live to auto-complete future entries in other discovery map elements and processes.

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Inputs and Outputs



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Figure 2-41. Inputs and Outputs

Adding participants to the discovery map helps answer the question “Who does what in the process?” Inputs and outputs answers “When does a task begin and finish?” Inputs and outputs do not pertain to data as much as they deal with process task upstream and downstream details. The example shows an expense reimbursement process discovery map. In the File Expense Report activity, the upstream input for the task is a “blank standardized expense report”, while the downstream output is a “completed expense report”. So the task begins with a blank expense report, is filled out, and ends when the report is completed.

Use the details fields in IBM Blueworks Live to describe passive BPMS interactions. Start with supplier inputs and outputs to customers that match an ideal case.



Note

This effort is not a capture of data inputs and outputs; that information is better served when it is detailed in a conceptual data model.

The screenshot shows a web-based application titled "File Expense Report". At the top, there's a blue header bar with the "IBM Training" logo on the left and the "IBM" logo on the right. Below the header, the main title "File Expense Report" is displayed in large white text, followed by a yellow star icon. The interface has a clean, modern design with a light gray background. A navigation bar at the top includes tabs for "Details", "Problems" (which is underlined, indicating it's the active tab), "Policies", "Documentation", "Attachments", and "Comments". To the right of the tabs are standard window controls: a maximize button, a minimize button, and a close button. The "Problems" section contains one item, which is a single row in a table-like format. The first column shows a small yellow star icon next to a traffic light icon. The second column contains the text "Low" and a yellow star icon. The third column contains the text "Low" and a green button with a plus sign. There are also two small circular buttons with plus and minus signs on either side of the green button.

Figure 2-42. Adding all details

Discovery map collaboration sessions can provide many process details. For instance, as mentioned before, the business owners and experts talk about process problems. The Problems category is provided to document the information. All categories can be used to capture as much information as necessary before moving on to the process diagram. However, even when the collaboration turns to the process diagram effort, it does not mean that the discovery map cannot be altered. The discovery map is always available for more collaboration and modification. At minimum, the participant information for each activity must be captured to move to a process diagram.

Section recap

- The capture of process details in the discovery map is focused on who does what in the process and when does a process task start and end
- The categories for the details added in a discovery map element are Details, Problems, Policies, Documentation, Attachments, and Comments
- The participant provides the *responsible role* detail for the activities in a process
- The business owners provide the *accountable roles* for the activities in a process
- Experts are considered the *consulted* roles for the activities in a process
- Inputs and outputs do not pertain to data as much as they deal with process task upstream and downstream details

Exercise 3: Capturing process details in a Discovery Map

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Figure 2-44. Exercise 3: Capture process details in a discovery map

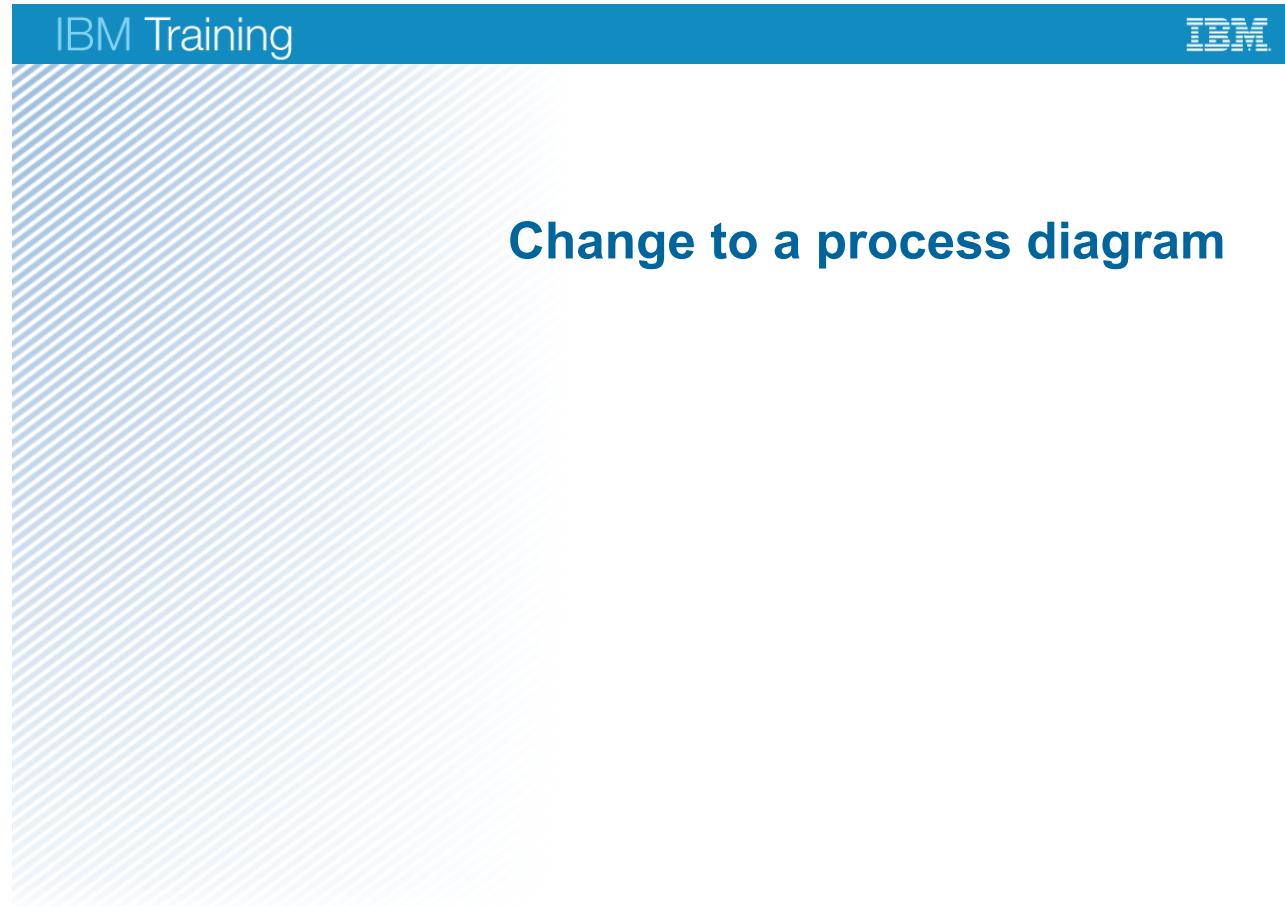
Exercise 3: Capturing process details in a Discovery Map.

Exercise objectives

After completing this exercise, a student should be able to:

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

2.4. Change to a process diagram



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Figure 2-46. Change to a process diagram

Topic 4: Change to a process diagram

Topics

- About process discovery
 - Creating a discovery map
 - Capturing process details
-  Change to a process diagram

Playback zero - Process Discovery

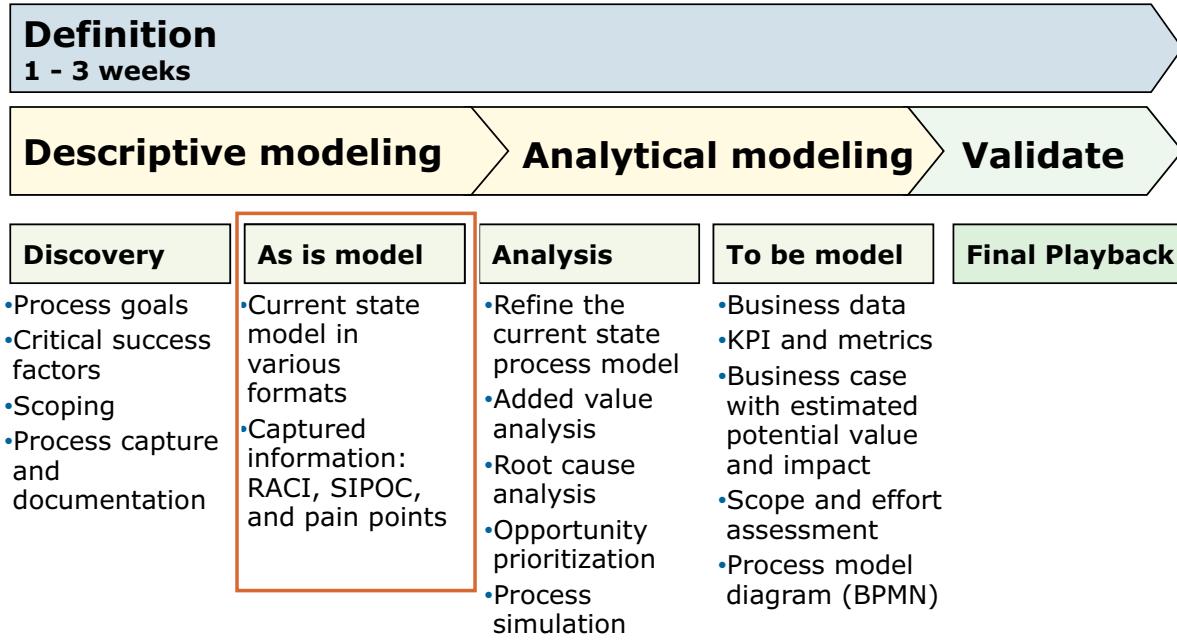
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Figure 2-47. Topics



Overview

Playback zero



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Figure 2-48. Overview

Part of process discovery is the creation of the initial process diagram. Up until now, the focus is the creation of a comprehensive discovery map complete with as much process detail as possible. The most common question when in the midst of a process discovery effort is:

- When is the move from a discovery map to a process diagram?

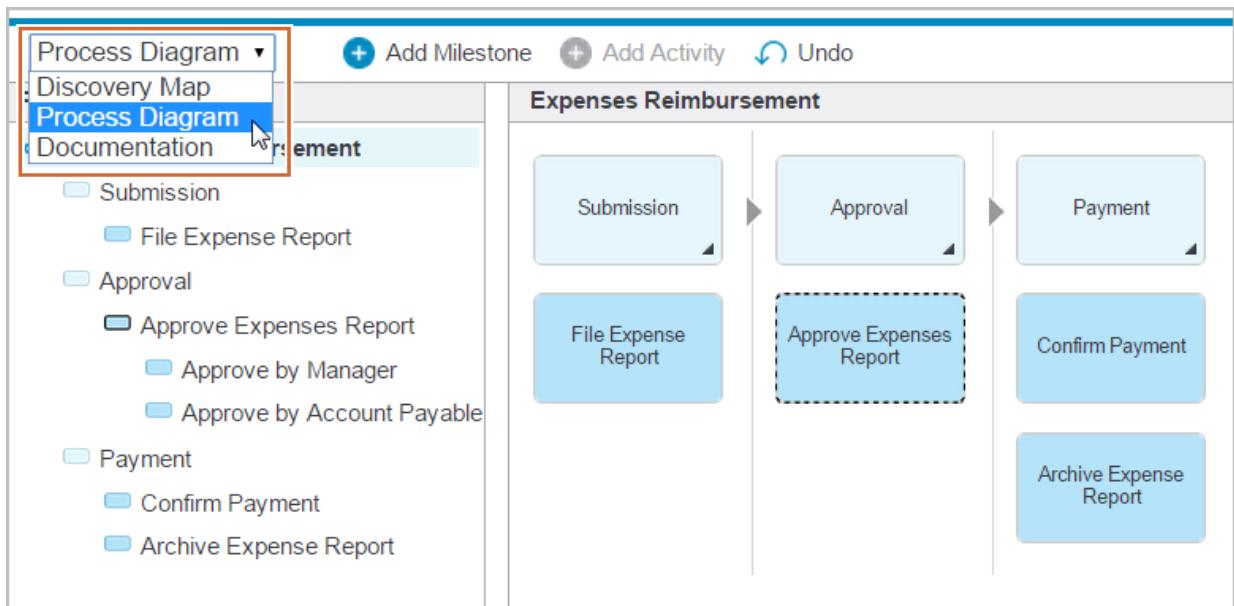
Several aspects need to be considered to answer this question. It is time to transfer to a process diagram when a discovery map exhausts all requirements to communicate what a process is. Another item to consider is the conversations in the process collaboration sessions during Playback zero meetings.

- “What does this process do?”
- “What does this process look like?”

The move to the process diagram is at hand. This effort gives the BPM team an “as is” process model.



From discovery map to a process diagram

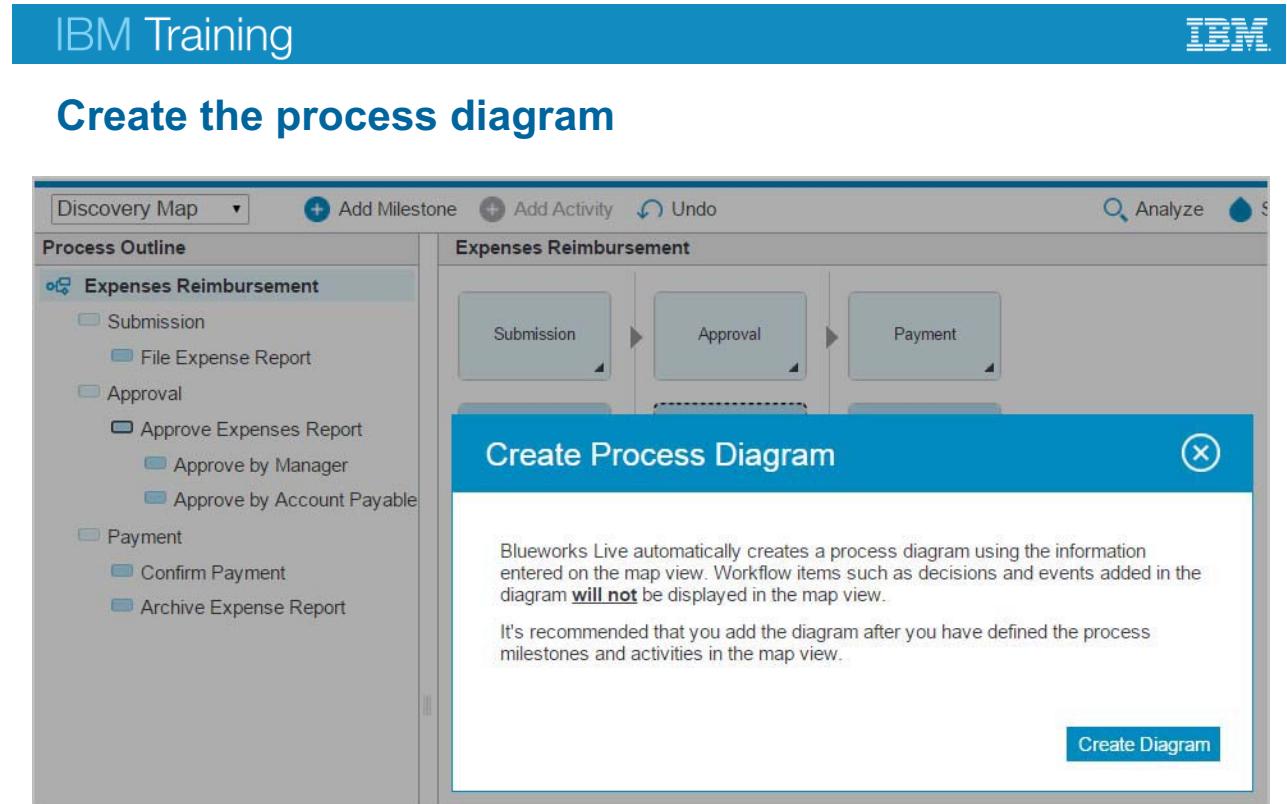


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Figure 2-49. From discovery map to a process diagram

To create a process diagram from the discovery map, the process author clicks the pull-down menu and selects **Process Diagram** from the options.



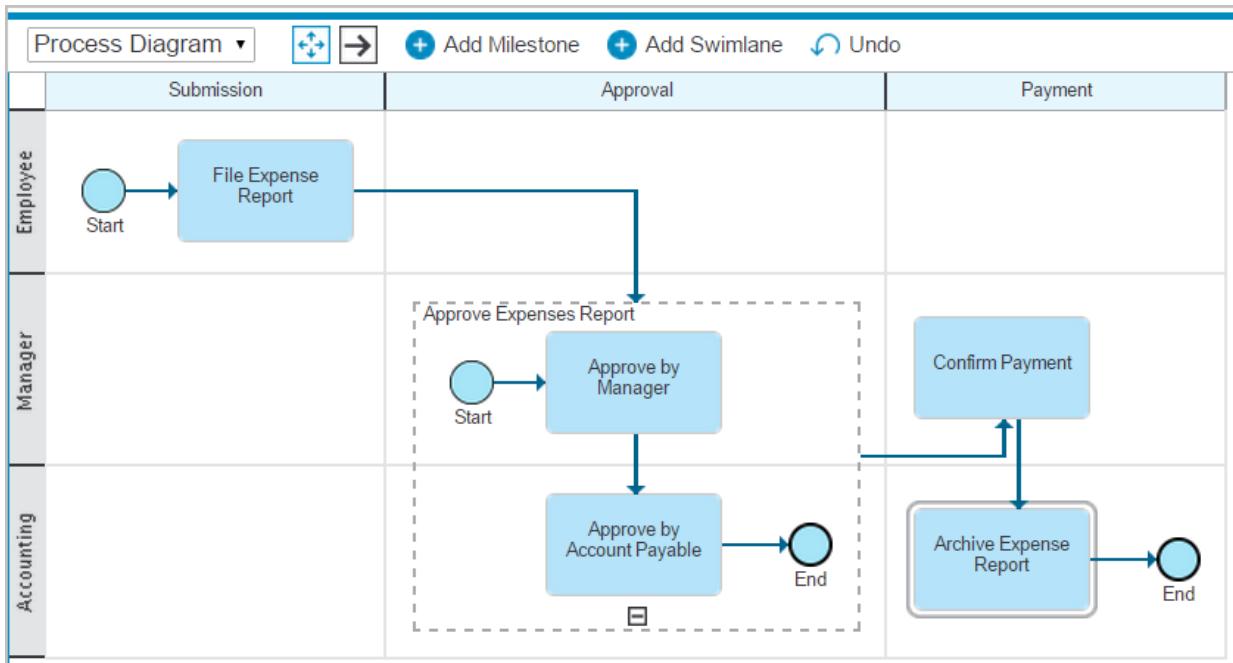
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Figure 2-50. Create the process diagram

In the initial creation of the process diagram, the process author receives a dialog box that states that the process milestones and activities are defined in the discovery map. To create the diagram, the process author clicks **Create Diagram**.

The initial process diagram



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Figure 2-51. The initial process diagram

In IBM Bluworks Live, creation of a process diagram is a simple matter of one click to convert from the discovery map. IBM Bluworks Live automatically does the work for you. The elements that are created from the discovery map retain all the details that are entered previously. Milestones are translated to process diagram section headers, and the participant details are assigned to lanes. The activities that are assigned to each participant then fall into the lane for each participant. Conversion to a process diagram automatically creates a start and end event for the process diagram.

Creation of the process diagram does not preclude a process author from continuing to modify the discovery map through ongoing collaboration sessions. The process diagram is linked to the discovery map when it is created. Any revisions that are made to either the discovery map or the process diagram is reflected in both in the IBM Bluworks Live process.

Unit summary

- 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

Review questions

1. True or False: You use a milestone in a discovery map to communicate a process task that a single business unit completes.
2. Which phase does user to conduct process capture and documentation during the Playback zero?
 - A. Descriptive modeling
 - B. Analytical modeling
 - C. Validate
 - D. Deployment
3. What of the following function do you use to restore a particular version of your process at anytime?
 - A. Undo
 - B. End Edit
 - C. Snapshots
 - D. Where Used



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Figure 2-53. Review questions

Write your answers here:

- 1.
- 2.
- 3.

Review answers

1. True or False: You use a milestone in a discovery map to communicate a process task that a single business unit completes.

The answer is False. You use a milestone in a discovery map to communicate a particular process phase.

2. Which phase does user to conduct process capture and documentation during the Playback zero?

- A. Descriptive modeling
- B. Analytical modeling
- C. Validate
- D. Deployment

The answer is A.

3. What of the following function do you use to restore a particular version of your process at anytime?

- A. Undo
- B. End Edit
- C. Snapshots
- D. Where Used

The answer is C.

Playback zero - Process Discovery

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Figure 2-54. Review answers



Unit 3. Playback zero - Process Diagram

Estimated time

01:00

Overview

In this unit, you learn how to enhance the diagram with decision points and conduct a Playback.

How you will check your progress

- Checkpoints
- Lab exercise

Unit objectives

- Enhance a Process Diagram in a Blueworks Live blueprint
- Examine the decision discovery
- Describe the governance support with Blueworks Live
- Conduct a Playback of the process diagram in Blueworks Live

3.1. IBM Blueworks Live process diagram



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Figure 3-2. IBM Blueworks Live process diagram

Topic 1: IBM Blueworks Live process diagram.

Topics

IBM Blueworks Live process diagram

- Modifying a process diagram
- Decision discovery
- Playback of a process diagram
- Other features of Blueworks Live

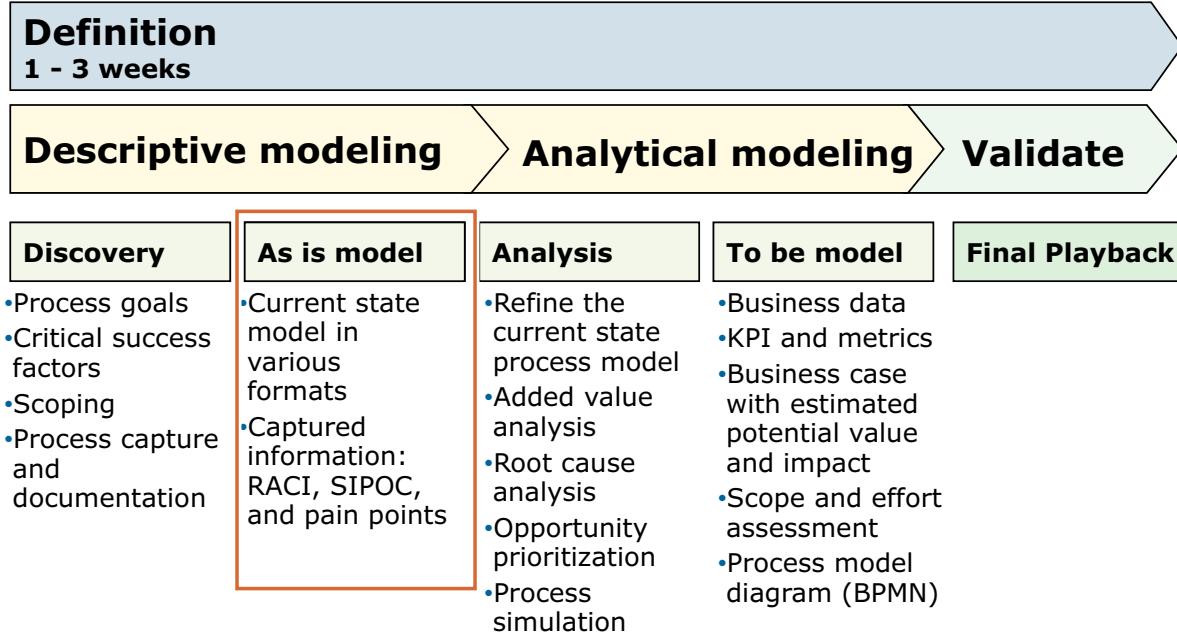
Playback zero - Process Diagram

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Figure 3-3. Topics

Overview

Playback zero



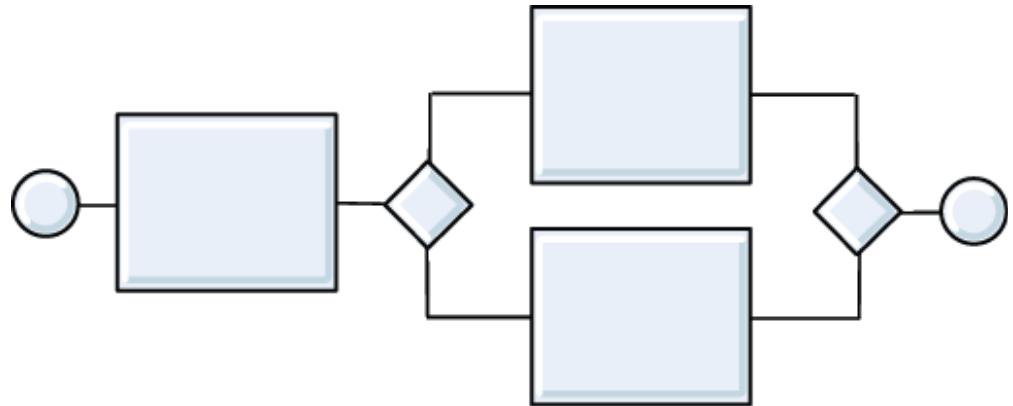
Playback zero - Process Diagram

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Figure 3-4. Overview

As described earlier, process descriptive modeling captures the ordered sequence of activities within a process along with supporting information from start to end. In the “as is” model, the business process is framed as a workflow model to reflect component activities, the roles that complete those activities, conditional branching, and the sequencing of the flow of work between activities. In IBM Blueworks Live, this workflow model is called a process diagram.

What is a process model?



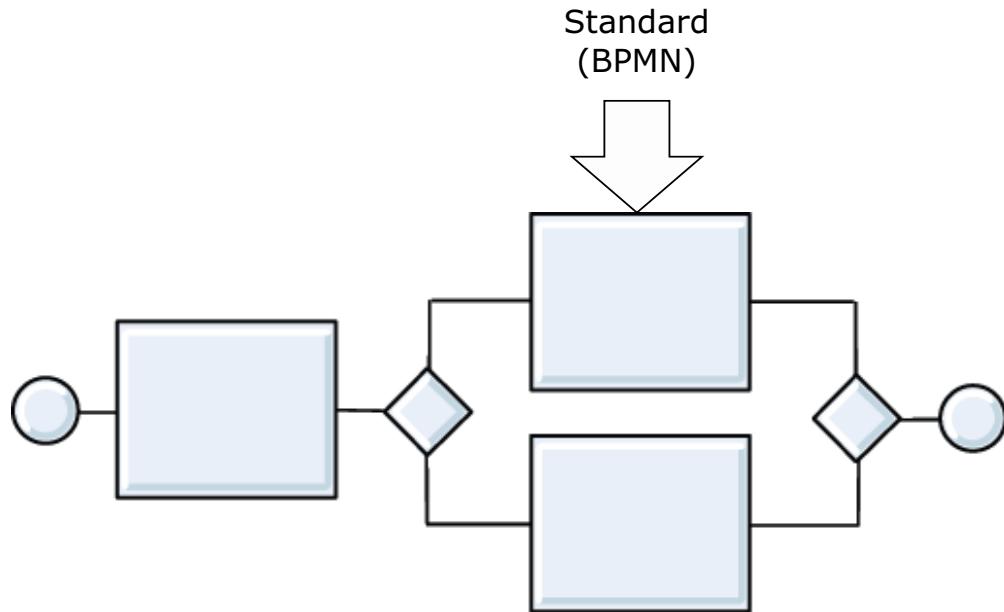
A graphical representation, or diagram, of the business process that is universally understood and easily communicated

Figure 3-5. What is a process model?

The outcome of descriptive modeling is a process diagram or model. A good process model is a graphical representation or diagram of the business process. Business people understand the diagram because of its simplicity. That understanding is the goal during the descriptive and analytical modeling effort. Executable modeling is when the process model is directly implemented in a business process management system (BPMS) such as the IBM Business Process Manager application.

A good process model provides views into a process that are clearly and easily communicated in 5 minutes or less at every level of granularity.

Business Process Model and Notation (BPMN)



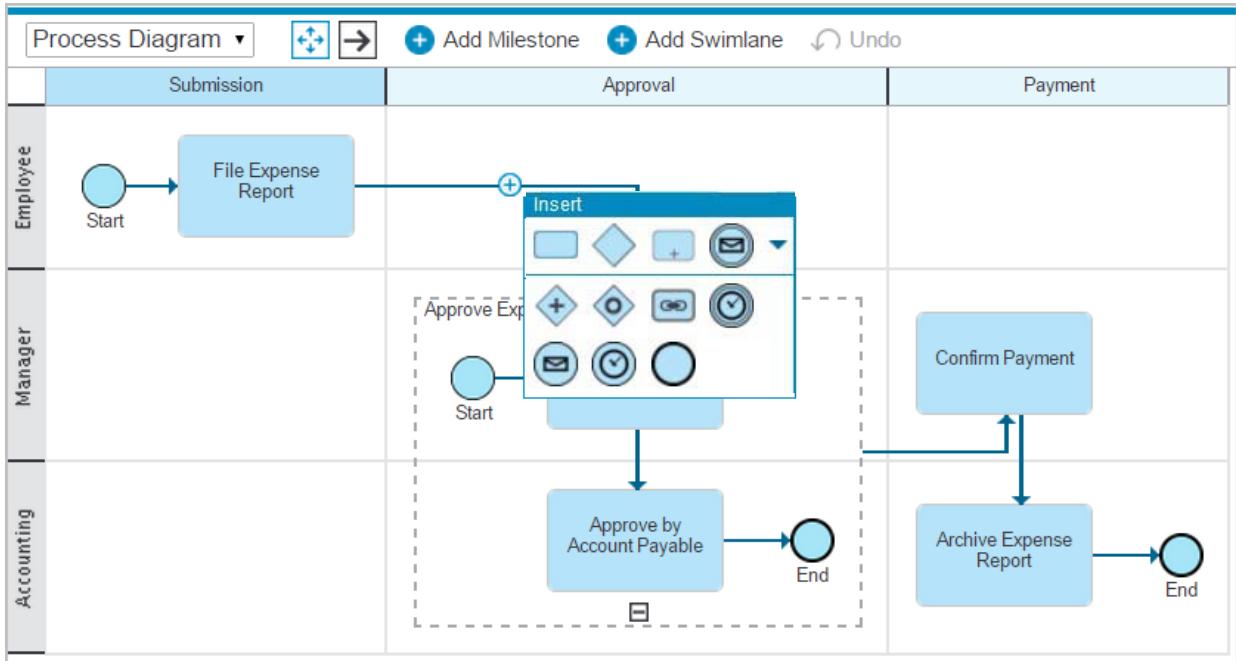
The primary goal of Business Process Model and Notation (BPMN) is to provide the graphical notation that is readily understandable by all

Figure 3-6. Business Process Model and Notation (BPMN)

Everyone must easily understand each other and recognize the same concepts in the same context in a process model. IT does not need to redraw a process model to provide more clarity or a different point of view. To communicate a model clearly within an organization, a notation standard must be applied. The primary goal of Business Process Modeling Notation (BPMN) is to provide the graphical notation that is readily understandable by all. It applies to business analysts who create the initial drafts of the processes, technical developers responsible for implementing the technologies that run those processes, and business people who manage and monitor those processes.

BPMN creates a standardized bridge for the gap between the business process design and process implementation. Agreed upon among multiple BPM vendors for the benefit of the user community is this single notation.

Process diagram BPMN core elements



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Figure 3-7. Process diagram BPMN core elements

IBM Blueworks Live uses six core BPMN elements:

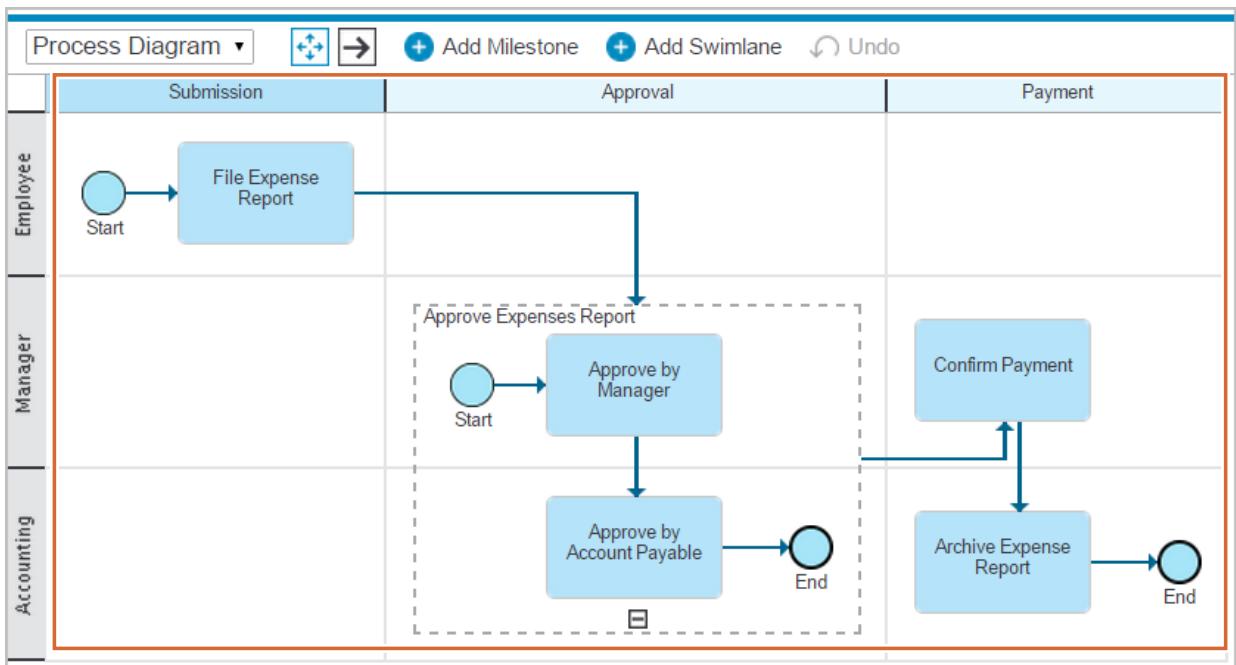
- Pool
- Lane
- Flow
- Activity
- Event
- Gateway

The focus of Blueworks Live is to maintain a close relationship with business owners, so there are limitations in the BPMN elements. It is not about a final implementation of an executable model, rather to gather consensus on the process definition at the end of the descriptive and analytical process modeling phase.

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Pool



Playback zero - Process Diagram

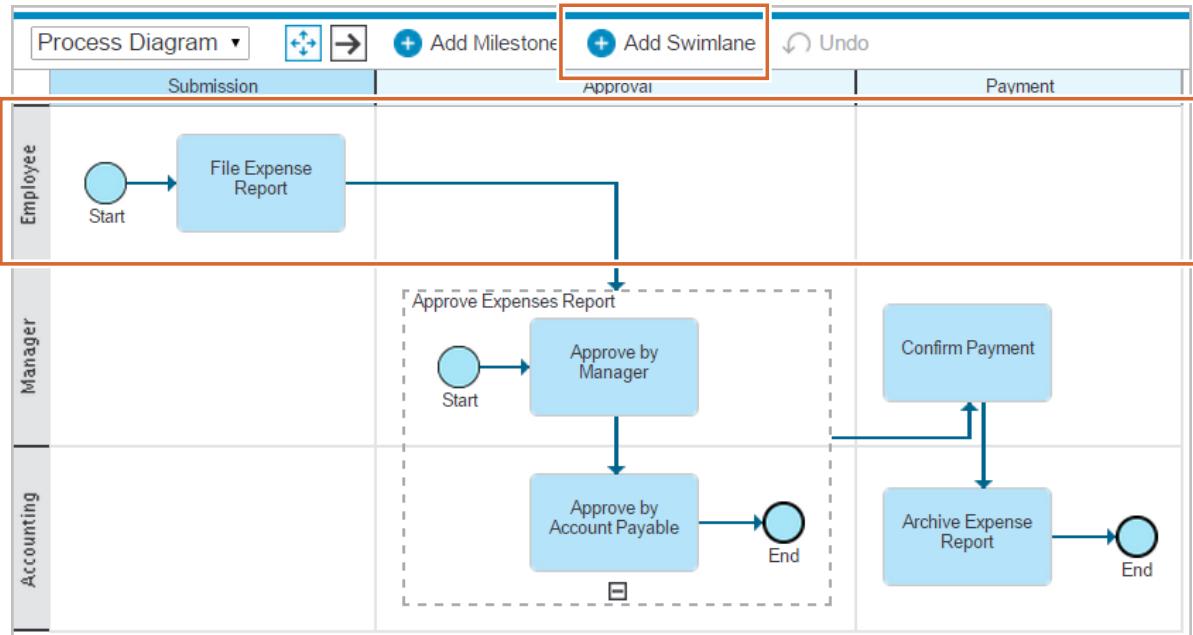
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Figure 3-8. Pool

In BPMN, a pool in the model represents the entire business process. In IBM Blueworks Live, the pool represents the entirety of the process diagram.



Lane



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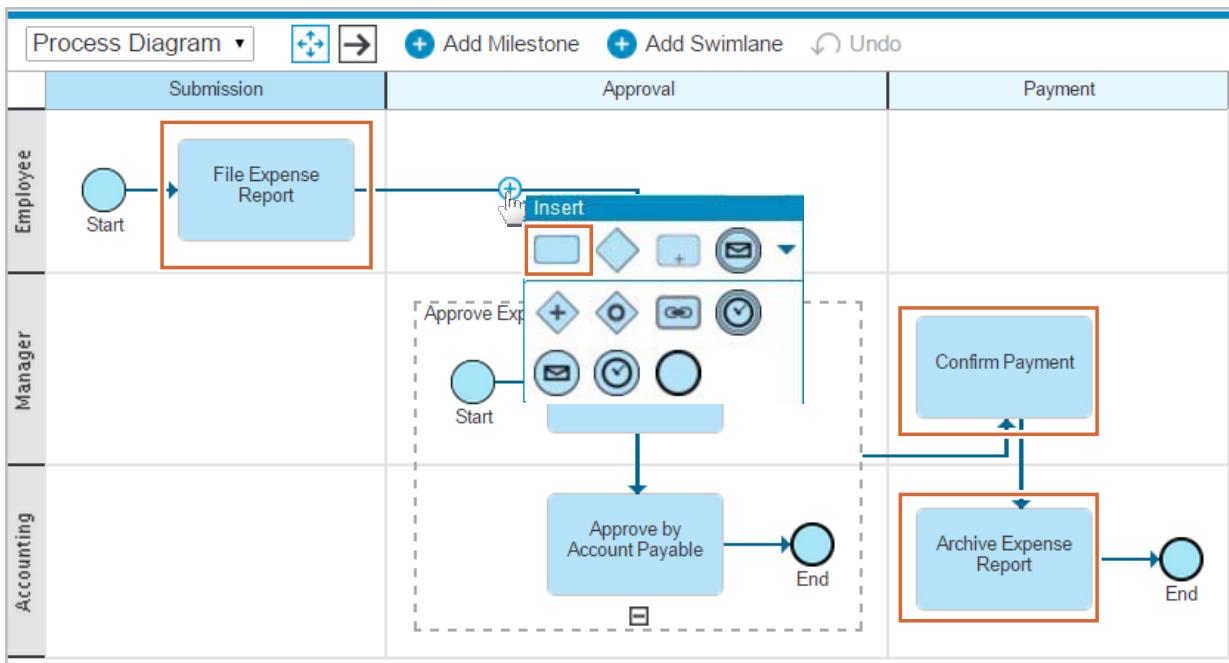
Figure 3-9. Lane

A lane, also known as a swimlane, is a subpartition within a process pool. Lanes are used to organize and categorize activities within a process diagram. A lane relates to the process participant identified earlier in the discovery map sessions. When the process authors added a participant to a particular activity in the discovery map, they created a lane in the process diagram. If process authors want to add a swimlane to the diagram, they click the **Add swimlane** icon or the + circle icon that is located between the existing lanes.

Modifying the process diagram with more swimlanes, including adding a system lane, is covered in more detail later in the course.



Activity



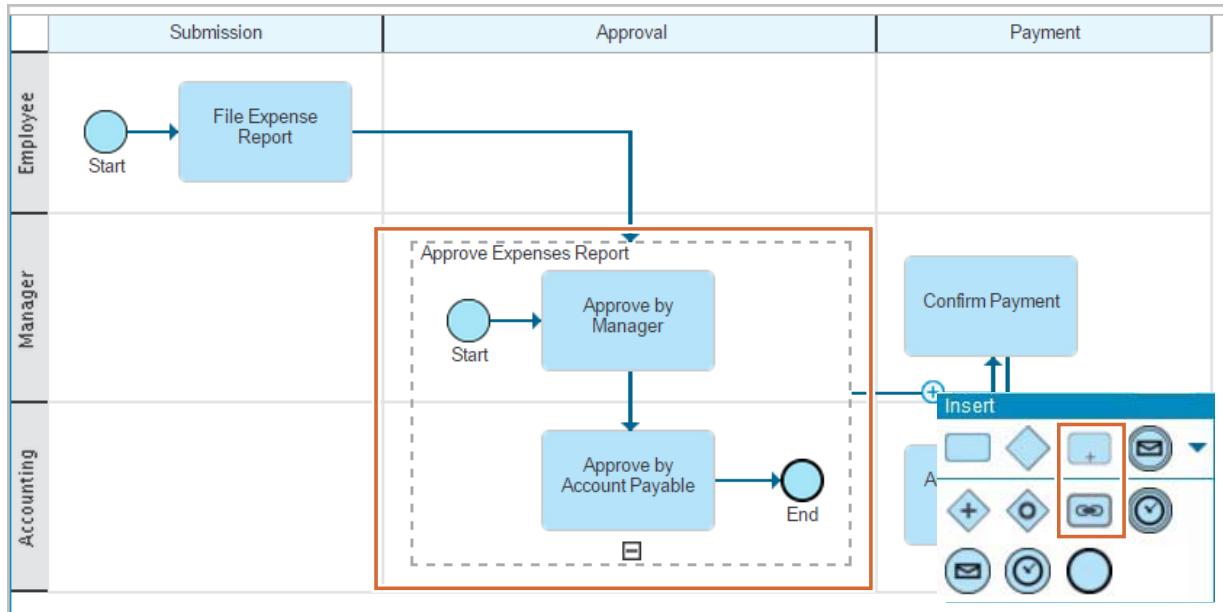
Playback zero - Process Diagram

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Figure 3-10. Activity

The BPMN activity in the process diagram relates one-to-one to the BPMN activity in the discovery map. When more activities are added to the discovery map, they are reflected in the process diagram in the participant lane that is identified in the map activity. A process author can also add activities directly in the process diagram by rolling over the flow line with the cursor and clicking the + circle icon. The process author then selects the activity icon to insert the new activity on the flow line. Activities added to the process diagram are also reflected in the discovery map.

Activity: Subprocess and linked process



Playback zero - Process Diagram

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Figure 3-11. Activity: Subprocess and linked process

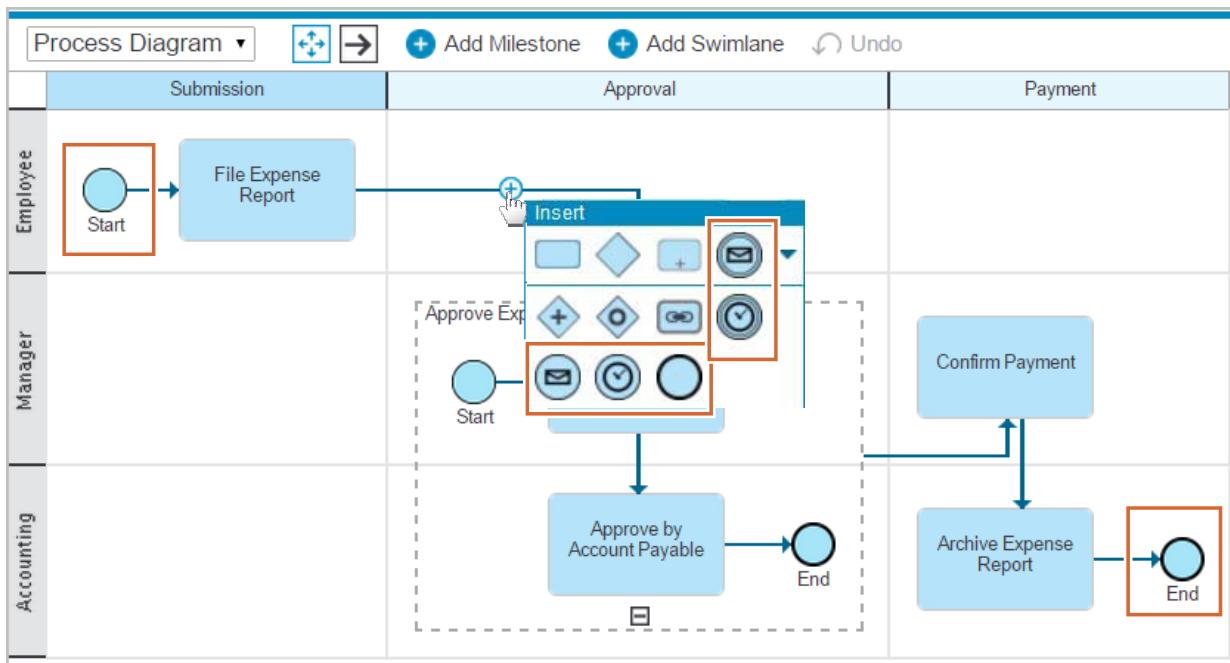
The other activity types that can be added to a process diagram are the subprocess and linked process. A subprocess allows a process author to embed multiple activities into one activity. A subprocess activity is a rectangle with a dashed-line outline.

A linked process is an independent process that can be reused because of its generic nature. For example, if a process author creates an approval process that can be used in other processes, then it is a good idea to create the process as a stand-alone process. Now any process that requires the approval process can link to the process without re-creating the same process repeatedly. A linked process is a rectangle with a dashed-line outline and a link icon on the lower-left corner.

A process author can add a subprocess or linked process in the process diagram by rolling over the cursor on a flow line and selecting the appropriate icon to insert the activity on the flow line.



Event



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Figure 3-12. Event

An event is a control flow object for a process diagram. Just like the definition of an event in everyday life, an event is something that occurs during a process. Three categories of events are available: start event, intermediate event, and end event. In the initial process diagram, a start event and an end event is required. A start event is a circle icon with a thin black outline while an end event is a circle icon with a thick black outline. Intermediate events are circle icons with a double-line outline. Three types of intermediate events are available in IBM Blueworks Live: intermediate message event, intermediate timer event, and intermediate exception event. A process author can add an event in the process diagram by rolling over the cursor on a flow line and selecting the appropriate event icon to insert the element on the process model flow line.



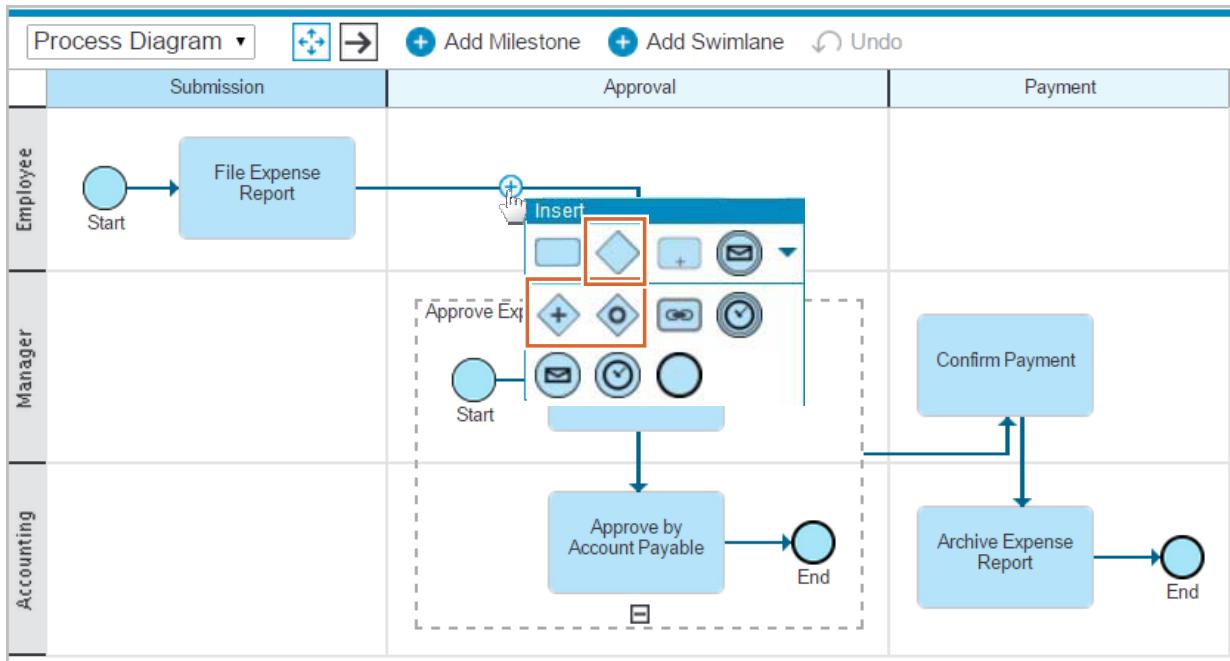
Note

Intermediate events in IBM Blueworks Live are resigned to process flow intermediate events. Intermediate events that are attached to activities are not feasible to model in Blueworks Live. Remember that the focus of Blueworks Live is business-oriented to obtain agreement on the basic process model and not to create an executable model. For that reason, BPMN elements that have implementation capabilities in a process model are not provided.

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Gateway



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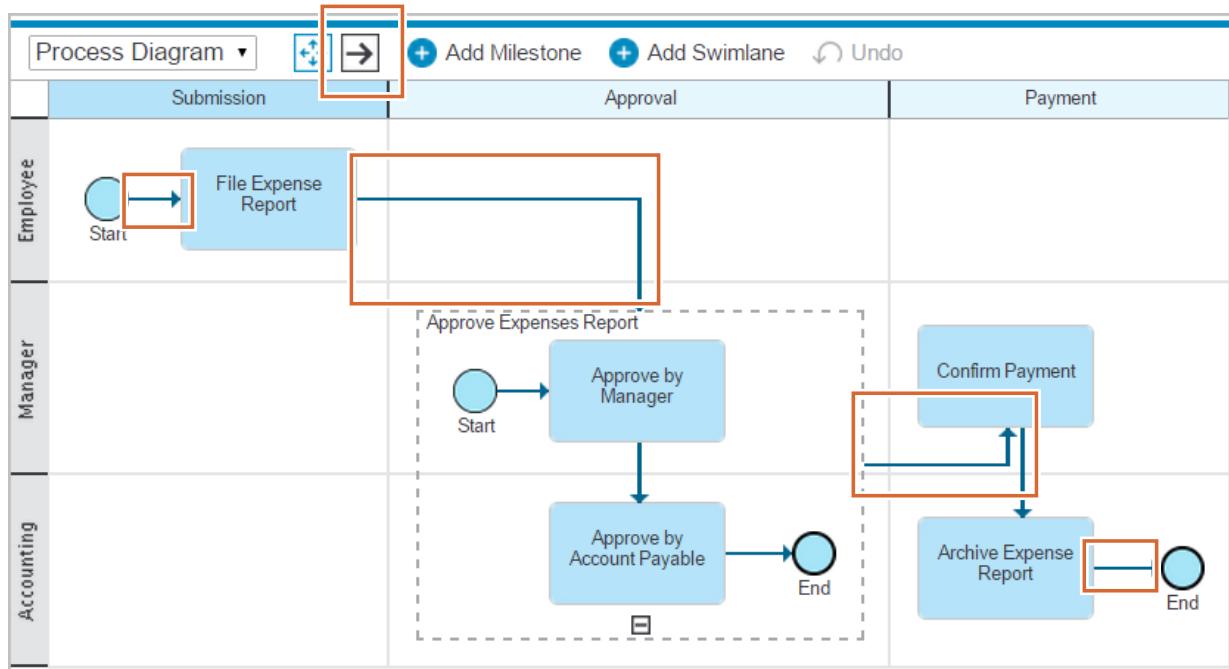
Figure 3-13. Gateway

The process diagram in IBM Blueworks Live is not relegated to just the expected order of task accomplishments. Business processes have alternative paths that need to be modeled to communicate optional workflow paths that happen during a process. The BPMN element that allows process authors to model alternative workflow paths is the gateway. Often, a gateway represents a question that is asked at a particular point in a process. The question has a defined set of alternative answers, or paths. All of the answers can be thought of as gates that keep the process from continuing until a valid answer is provided for the question.

A process author can add a gateway type in the process diagram by rolling over the cursor on a flow line and selecting the appropriate gateway to insert the element on the process model flow line. More details on adding gateways to modify the process diagram are covered later in this course.



Flow



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Figure 3-14. Flow

Comprehensive process models communicate process flow well. Process sequence flow encompasses both the normal, expected process path to completion, and alternative process paths that might occur with different process conditions or business rules. It is important to understand what types of sequence flow exist in process modeling. Sequence flow is considered to be part of a category of connecting objects. These objects connect each element on the diagram to indicate the order in which elements are completed.

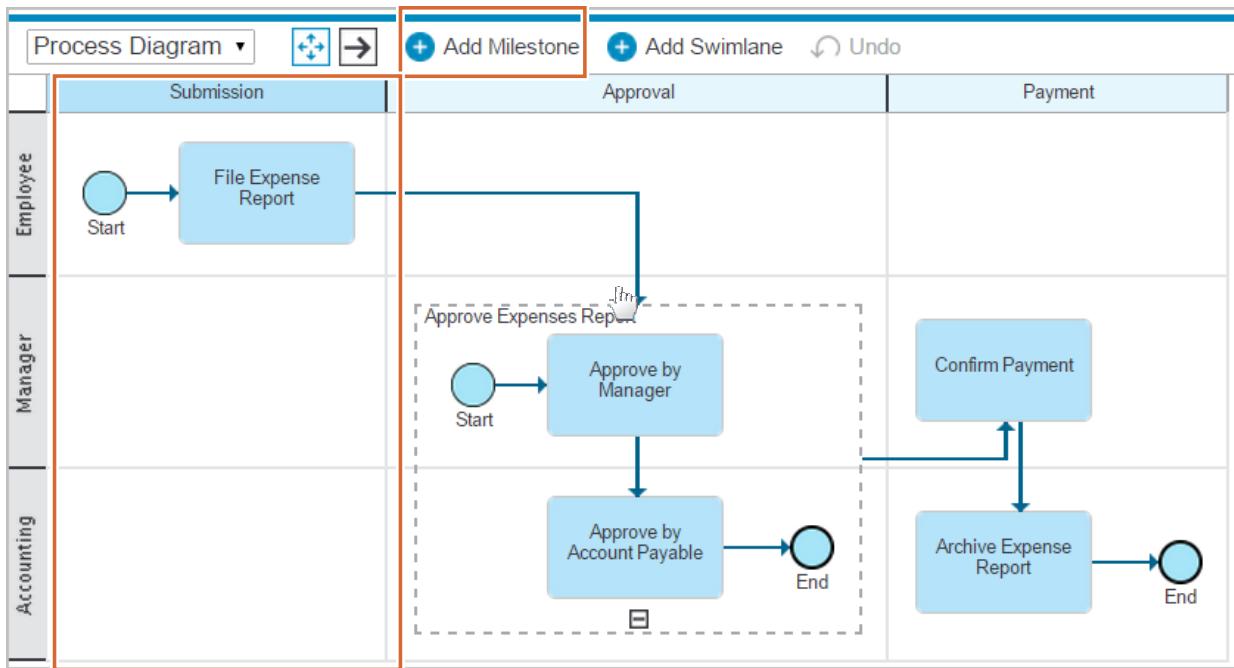
Normal sequence flow

The simplest example of sequence flow is the connection of two flow objects; for example, the start event and the first activity in a process diagram. Normal sequence flow is a plain arrow. With normal sequence flow, the business process moves to the next task or event in the process as soon as the first task or event is completed.

Conditional sequence flow

Conditional sequence flow is associated with gateways. Conditional expressions are evaluated to determine which path the flow takes. The difference between normal and conditional sequence flows is that conditional flows are not automatically followed; the condition must be met first. The number of conditional flows that are followed is determined according to the type of element that is used and the requirement of the instance that is processed.

Not a BPMN element: Milestone



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Figure 3-15. Not a BPMN element: Milestone

Although not a BPMN element, a milestone is part of the elements available to a process author to create the process diagram in Blueworks Live. Milestones are process phases; they should indicate the significant subdivisions of the whole process, not each individual step. Milestones highlight portions of the process that are good candidates for implementation of process intervals during process implementation. Milestones also provide a useful way to organize discussion of process metrics with process owners and other business stakeholders.

A process author can add milestones to a process diagram by clicking the **Add Milestone** icon or rolling over the cursor between the milestone labels. The process author then clicks the + circle icon to add a milestone between the two existing milestones.

Section recap

- In IBM Blueworks Live, the workflow process model is called a process diagram
- A process model is a graphical representation, or diagram, of the business process that is universally understood and easily communicated
- The primary goal of Business Process Model and Notation (BPMN) is to provide the graphical notation that is readily understandable by all
- The BPMN elements that are employed in IBM Blueworks Live are pool, lane, flow, activity, event, and gateway
- The element that is not a BPMN element in IBM Blueworks Live is a milestone

3.2. Modifying a process diagram

Modifying a process diagram

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Figure 3-17. Modifying a process diagram

Topic 2: Modifying a process diagram

Topics

- IBM Blueworks Live process diagram
- ▶ Modifying a process diagram
- Decision discovery
- Playback of a process diagram
- Other features of Blueworks Live

Playback zero - Process Diagram

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Figure 3-18. Topics

Overview

Playback zero

Definition

1 - 3 weeks

Descriptive modeling

Analytical modeling

Validate

Discovery

- Process goals
- Critical success factors
- Scoping
- Process capture and documentation

As is model

- Current state model in various formats
- Captured information: RACI, SIPOC, and pain points

Analysis

- Refine the current state process model
- Added value analysis
- Root cause analysis
- Opportunity prioritization
- Process simulation

To be model

- Business data
- KPI and metrics
- Business case with estimated potential value and impact
- Scope and effort assessment
- Process model diagram (BPMN)

Final Playback

[Playback zero - Process Diagram](#)

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Figure 3-19. Overview

When the baseline process diagram or model is created, the move towards improvement begins. However, there are alternative process flow paths to be diagrammed before process improvement conversations can begin. Modifying a process diagram is about adding BPMN elements to the existing model until both expected and alternative paths are communicated.

However, only some of those paths are part of the “as is” modeling effort; others are part of the analytical process modeling effort. Analytical process modeling is about refining the model to improve the process from its current state.

Adding alternative paths to a process diagram



- Decision gateway: Process flow along only one possible answer



- Split gateway: Process flow along multiple answers



- Conditional split gateway: Process flow along one or more conditional answers

Figure 3-20. Adding alternative paths to a process diagram

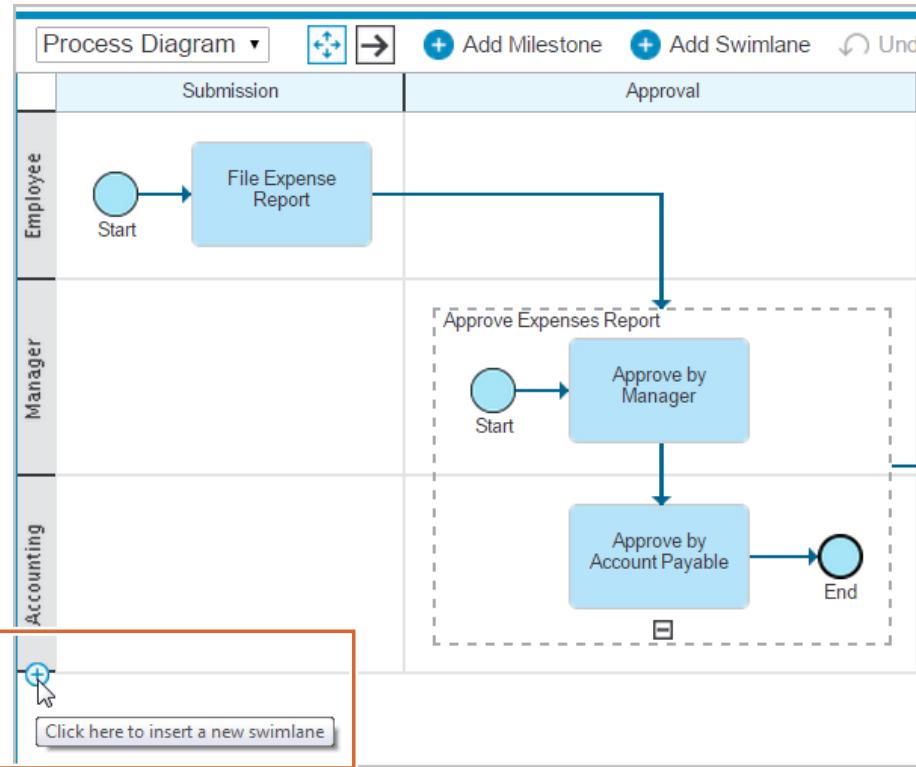
The key to modeling alternative process flow paths is the gateway. A gateway is a question asked in a process, and the path that is taken is based on the answer to that question. For example, if the process asks “Is the request compliant?”, the answer is “yes” or “no”. If “yes”, then the process flow path is to the approval activity. If “no”, then the alternative path is to route the request back to the original participant, to a different activity labeled “Resubmit a Request”.

The gateway types available in IBM Blueworks Live are:

- Decision gateway: If process authors want to send the process flow along only one of the available sequence flows from the gateway, they use the decision gateway.
- Split gateway: If process authors want to send the process flow along multiple sequence flows from the gateway, they use the split gateway.
- Conditional split gateway: If process authors want to send the process flow along one or more conditional sequence flows from the gateway, they use the conditional split gateway.

None of these gateways can be implemented with the conditions that need to be met in IBM Blueworks Live. They can be modeled and displayed for the possible sequence flow paths (alternative paths) that are required.

Alternative path example: Add a lane



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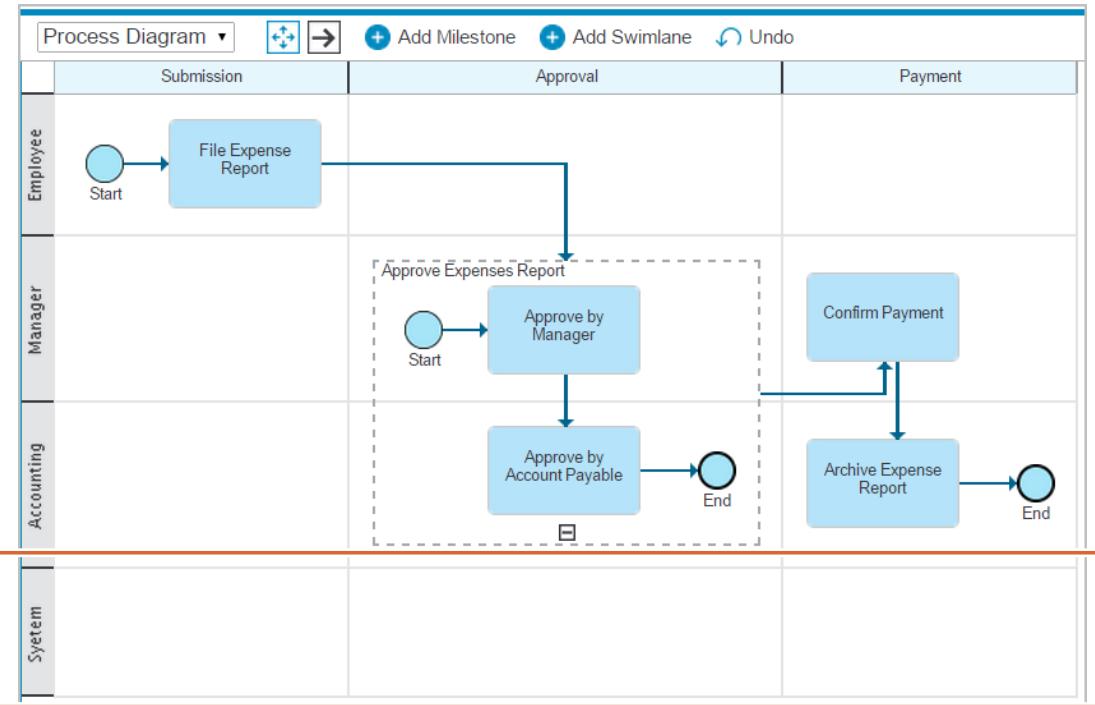
Figure 3-21. Alternative path example: Add a lane

Returning to the expense reimbursement process, the process owner would like to add one important alternative path to the Submission milestone. The process has a current protection against faulty expense report submission, an automated verification for compliance before the next phase of the process is completed. To accomplish modeling this alternative path, the process author begins by adding a system swimlane. To do so, the process author rolls the cursor over the bottom lane label until the + circle icon is shown. The process author clicks the icon to add the new swimlane and renames the lane to "System".

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System lane



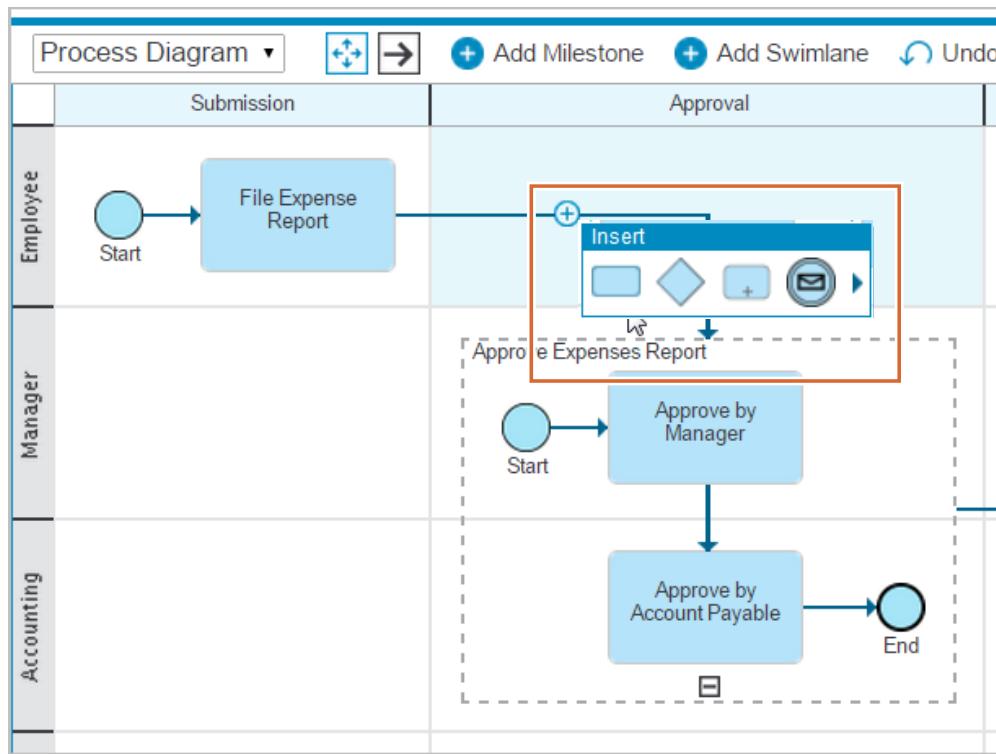
Playback zero - Process Diagram

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Figure 3-22. System lane

Process diagrams in IBM Blueworks Live are business-oriented models. The value of the process diagram is to communicate the process state, whether it is the “as is” or “to be” process. Adding a system lane to the process diagram is about communicating the process state and not about implementing an executable model. This effort is important to remember when it is time to prepare the process diagram for import into IBM Business Process Manager. More detail about the import of the process diagram is covered later in the course.

Alternative path example: Add an activity



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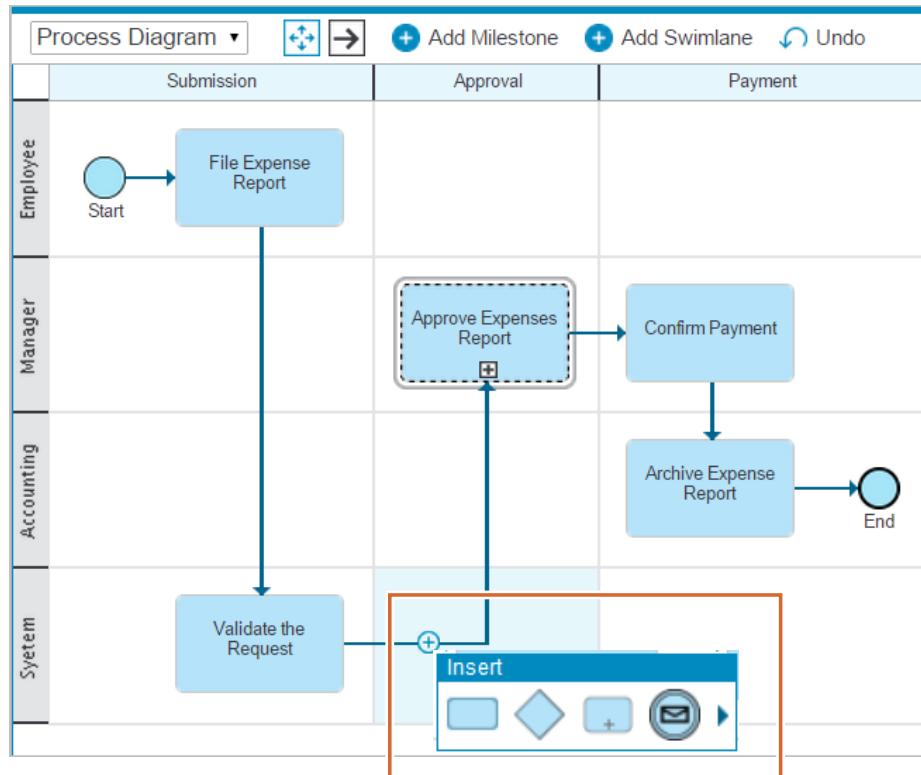
Figure 3-23. Alternative path example: Add an activity

Now the process author adds activities to the process diagram to fulfill the new requirement from the process owner for the Submission phase of the process. These activities happen after the first activity, "File Expense Report," and before the second activity, "Approve Expense Report". To add the activities for the validation, the process author rolls over the cursor on the flow line between the two activities. The process author clicks the + circle icon and then selects the activity icon to add the icon to the process.

The process author moves the activity to the system lane below the first activity and makes sure that it is still in the Submission phase of the process. Now the author changes the label on the activity to read "Validate the Request".



Alternative path example: Add a decision gateway



Playback zero - Process Diagram

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Figure 3-24. Alternative path example: Add a decision gateway

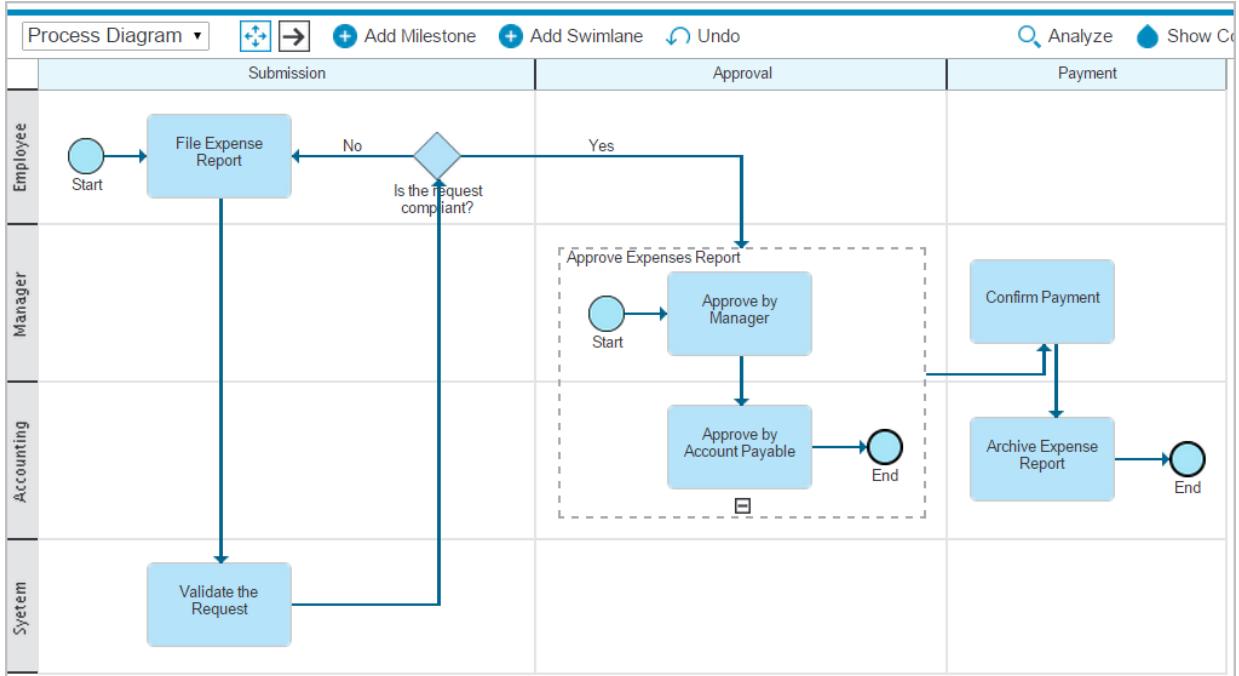
The process author adds a decision gateway to the process diagram by rolling the cursor over the flow line between the system activity and the next activity. The process author clicks the + circle icon and then selects the decision gateway icon to place it on the diagram. The author then moves the decision icon to the left of the “File Expense Report” activity and within the Submission phase of the process. The next step is to delete the end event that is automatically added to the decision icon. The author clicks the **Flow Line** icon and redraws a new flow line from the decision gateway to the “File Expense Report” activity. To add a label to the new flow line, the author right-clicks the flow line and clicks **Add Label**.

1. The author types in the new label for the flow line: No
2. The author then clicks the label on the decision gateway and types in the question: Is the request compliant?

This modeling completes the new alternative path in the Submission phase of the process.



Expense reimbursement “as is” process model



Playback zero - Process Diagram

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Figure 3-25. Expense reimbursement “as is” process model

The new alternative path is added to the process diagram. The process owner and process author move the Confirm Payment activity to the Accounting participant swimlane. The Archive Expense Report is moved to the System swimlane to complete the first draft of the “as is” process model. As before with the discovery map, the process author decides to take a snapshot of the process model to save a place holder for the next round of edits to the diagram.

The screenshot shows the IBM BPM interface. On the left, there's a process diagram titled 'File Expense Report'. The diagram starts with a 'Start' node, followed by a decision diamond 'Is the request complete?'. If 'Yes', it leads to an 'Approve Expenses Report' activity, which then branches into 'Approve by Manager' and 'Approve by Account Payable', both leading to an 'End' node. If 'No', it goes to a 'Validate the Report' activity. On the right, a detailed view of the 'File Expense Report' is shown in a modal window. The 'Details' tab is selected, displaying information about participants, business owners, experts, inputs, outputs, policies, and attachments. A red box highlights the 'Participants' section, which lists 'Employee' (marked with a yellow star) and 'HR Manager' (marked with a yellow star). Below this, sections for 'Business Owners', 'Experts', 'Inputs', 'Outputs', 'Policies', and 'Attachments' are shown. At the bottom of the details pane is a 'Add Comment' button.

Playback zero - Process Diagram

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Figure 3-26. Share a process diagram

By clicking the **End Edit** icon, the process author stops the editing on the blueprint process and allows Contributors and Editors to review the process diagram. Clicking the **Unshare/Share** icon, the process author allows space participants to provide comments on the blueprint process. The Contributors, or business stakeholders other than the process owner, view the discovery map by clicking the **Discovery Map** icon. Contributors view the process diagram by clicking the **Process Diagram** icon. The **Documentation** icon allows Contributors to view only the details that are entered for the discovery map and process diagram in an executive summary outline format.

As the Contributors review the individual elements in either the discovery map or the process diagram, the right pane provides details that are entered for each. When Contributors want to provide feedback, they click the **Add Comment** icon. Comments added for the blueprint process are shown in the private community stream on the Space page.

Section recap

- Modifying a process diagram is about adding BPMN elements to the existing model until both expected and alternative paths are communicated
- Decision gateway: Process flow along only one possible answer
- Split gateway: Process flow along multiple answers
- Conditional split gateway: Process flow along one or more conditional answers
- Adding a system lane to the process diagram is about communicating the process state and not about implementing an executable model

3.3. Decision discovery

Decision discovery

Playback zero - Process Diagram

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Figure 3-28. Decision discovery

Topic 3: Decision discovery

Topics

- IBM Blueworks Live process diagram
 - Modifying a process diagram
-  Decision discovery
- Playback of a process diagram
 - Other features of Blueworks Live

Playback zero - Process Diagram

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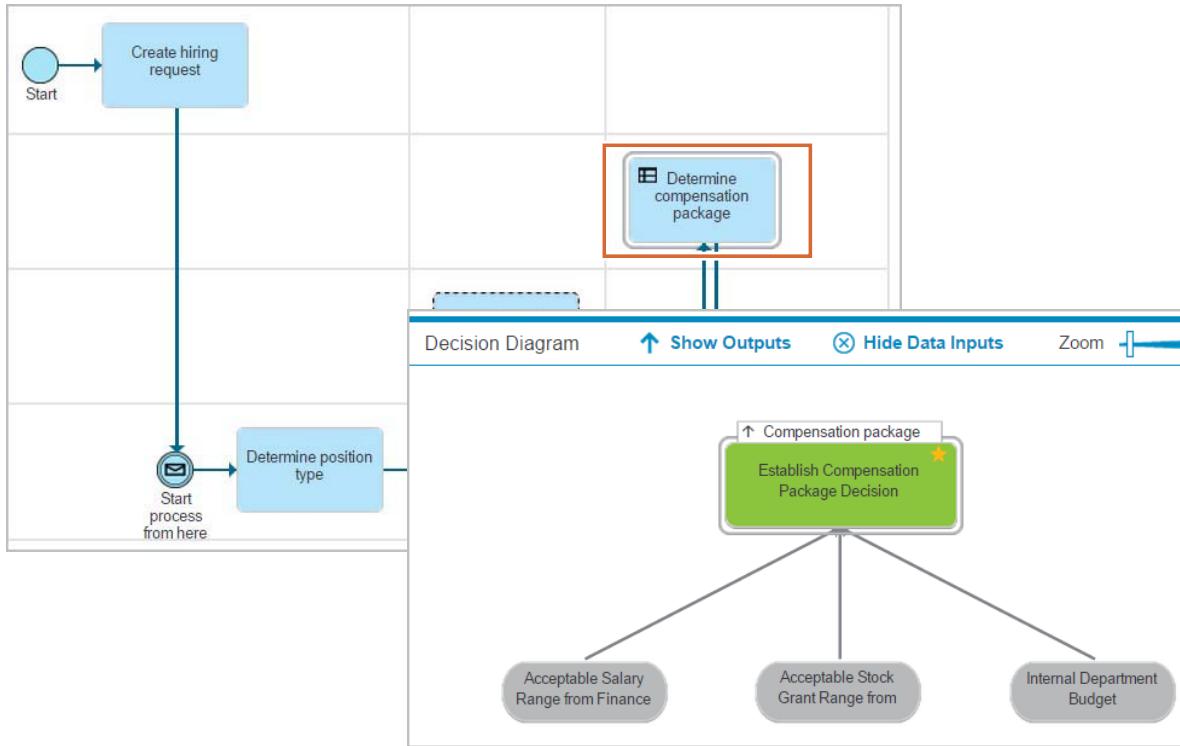
Figure 3-29. Topics

Decision discovery with Blueworks Live

- Use 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.

Figure 3-30. Decision discovery with Blueworks Live

Decisions within business processes



Playback zero - Process Diagram

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Figure 3-31. Decisions within business processes

In Blueworks Live, a decision is associated with a *Decision Task* in the Process Diagram. A Decision Task is equivalent to a *Business Rule Task* in BPMN 2.0, and uses the same graphical notation and icon.

IBM Training 

Capturing key decision characteristics: Details

Establish Compensation Package Decision ★

Details	Decision	Policies	Attachments	Documentation	Comments		
<ul style="list-style-type: none"> Business Motivation  							
<ul style="list-style-type: none"> Business Owners  							
<ul style="list-style-type: none"> Experts  	<ul style="list-style-type: none"> Key Performance Indicators  						
<ul style="list-style-type: none"> Sources  	<ul style="list-style-type: none"> How often is this decision made?  				<table border="1"> <tr> <td>Volume</td> <td>Low</td> </tr> </table>	Volume	Low
Volume	Low						
	<ul style="list-style-type: none"> How often is this decision updated?  				<table border="1"> <tr> <td>Frequency</td> <td>Low</td> </tr> </table>	Frequency	Low
Frequency	Low						
	<ul style="list-style-type: none"> How much time do you have to update the decision?  				<table border="1"> <tr> <td>Latency</td> <td>Low</td> </tr> </table>	Latency	Low
Latency	Low						

Playback zero - Process Diagram

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Figure 3-32. Capturing key decision characteristics: Details

You can document many of the key decision characteristics explicitly in Blueworks Live from the **Details** tab. You can capture more details on the **Documentation** tab, and if needed, you can attach documents to the decision on the **Attachments** tab.



Capturing key decision characteristics: Decision (1 of 2)

Establish Compensation Package Decision ★

Details	Decision	Policies	Attachments	Documentation	Comments								
<p>▼ Decision Description ⓘ <i>Click to Edit Description</i></p> <p>▼ Inputs and Output ⓘ</p> <table><thead><tr><th>Inputs</th><th>Output</th></tr></thead><tbody><tr><td>→ Acceptable Salary Range fro...</td><td></td></tr><tr><td>→ Acceptable Stock Grant Rang...</td><td></td></tr><tr><td>→ Internal Department Budget</td><td>↑ Compensation package</td></tr></tbody></table>						Inputs	Output	→ Acceptable Salary Range fro...		→ Acceptable Stock Grant Rang...		→ Internal Department Budget	↑ Compensation package
Inputs	Output												
→ Acceptable Salary Range fro...													
→ Acceptable Stock Grant Rang...													
→ Internal Department Budget	↑ Compensation package												

Figure 3-33. Capturing key decision characteristics: Decision (1 of 2)

On the **Decision** tab, you can add the description of the decision, and its inputs and outputs.

Capturing key decision characteristics: Decision (2 of 2)

▼ Decision Table ②

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 1

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

Playback zero - Process Diagram

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Figure 3-34. Capturing key decision characteristics: Decision (2 of 2)

On the **Decision** tab, you can also list the considerations and conclusions for the decision table, including the exception table, if needed.

Composing a decision

- When composing a decision, begin in a top-down fashion, beginning with the root decision.
- Name the decision output, and add any data inputs or subdecisions that this decision might depend on.
- Move down to the next level in the decision diagram and do the same for any required subdecisions.
- Repeated for each subdecision until the decision structure is complete.
- Possible to go back and forth between the various levels and subdecisions in the diagram.
- Refine the decisions iteratively until they are all complete.

Playback zero - Process Diagram

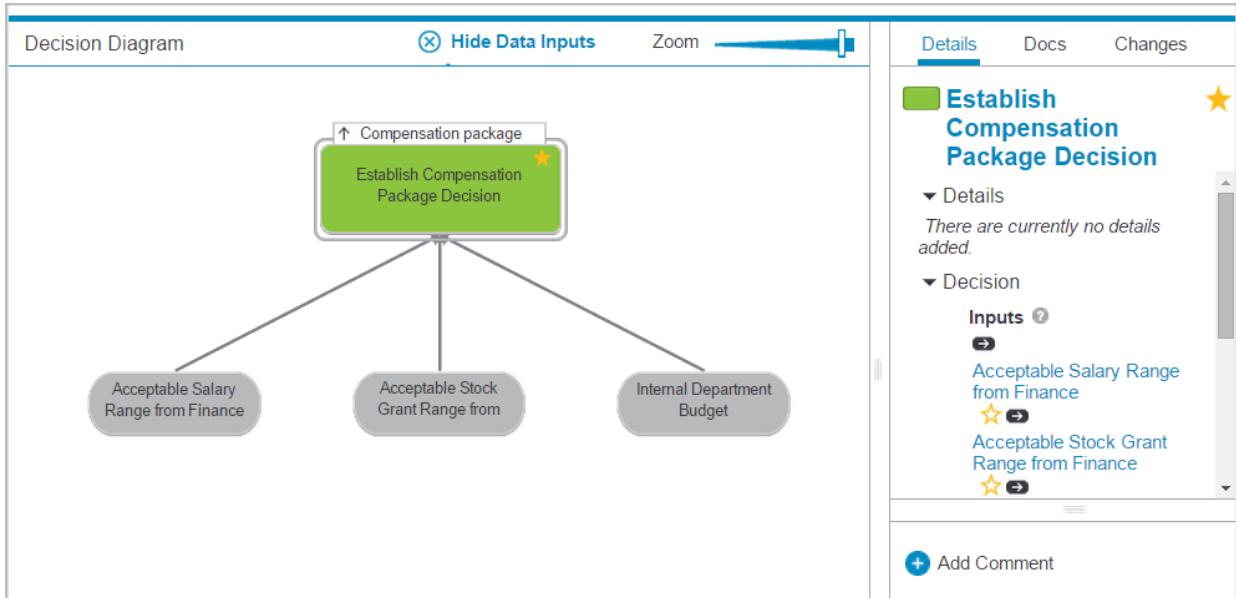
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Figure 3-35. Composing a decision

When composing a decision, you begin in a top-down fashion, beginning with the root decision. You give the decision output a meaningful business name, and add any data inputs or subdecisions that this decision might depend on. Then, you move down to the next level in the decision diagram and do the same for any required subdecisions. This action is usually repeated for each subdecision until the decision structure is complete, although it is also possible to go back and forth between the various levels and subdecisions in the diagram refining them iteratively until they are all complete. Figure 3-36 shows a composed decision. The **Add Sub-Decision** and **Add Data Input** buttons and menu items automatically lay out the diagram as the corresponding elements are added.

IBM Training 

Viewing a decision



Playback zero - Process Diagram

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Figure 3-36. Viewing a decision

In View mode, the user can go between the different elements of the decision diagram, with the details in a separate pane on the right side of the window. When a subdecision is selected in the diagram, This pane shows all of the details of that subdecision, including any decision tables, documentation, attachments, or comments.

The screenshot shows the IBM Training interface. At the top, there's a blue header bar with the text "IBM Training" on the left and the IBM logo on the right. Below the header, the main content area has a title "Collaborating on decisions". The interface is divided into several sections:

- Space Details:** Shows the space name "Training Space" with a star rating and edit tags options.
- Activity Stream:** A timeline showing recent activity. It includes a post from the user about reviewing the space, changes made by the user to a "Hiring Requisition" process, and a message from "BWL Admin" asking if they have reviewed the space.
- Process Blueprints:** A list of items, with one item named "Hiring Requisition" currently selected.
- Export Space:** A button in the top right corner.

Playback zero - Process Diagram

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Figure 3-37. Collaborating on decisions

Many useful collaboration features are available in Blueworks Live. Useful when working with decisions is the Activity Stream. Here, the user can see all of the changes that are made to their decisions, and who made them. They can communicate with their team through posting to the stream, or adding comments to decisions that they are collaborating on. They can also interact through live chat with their teammates, sharing links to the processes and decisions that they are viewing.

IBM Training



Validating decisions

Related Artifact
Establish Compensation Package Decision

Process Name
Hiring Requisition

Process Description and Location
The process of Hiring Requisition needs to be reviewed.

Attachment(s)

- + Add
- Access point.pdf** 392 kb
Uploaded by BWL Admin on 30-Jan-2016

Workflow Tasks

- Process started by BWL User2 on 30-Jan-2016 at 9:17 PM
- BWL Admin** Subject matter expert review
 - Complete**
 - Add Task**
 - [Reassign this task to another user](#)
- BWL User1** Update process based on feedback
 - [Reassign this task to another user](#)
- BWL User2** Final review and approval
 - [Reassign this task to another user](#)
- BWL User2** Share process with Participants
 - [Reassign this task to another user](#)

Start → End

Playback zero - Process Diagram

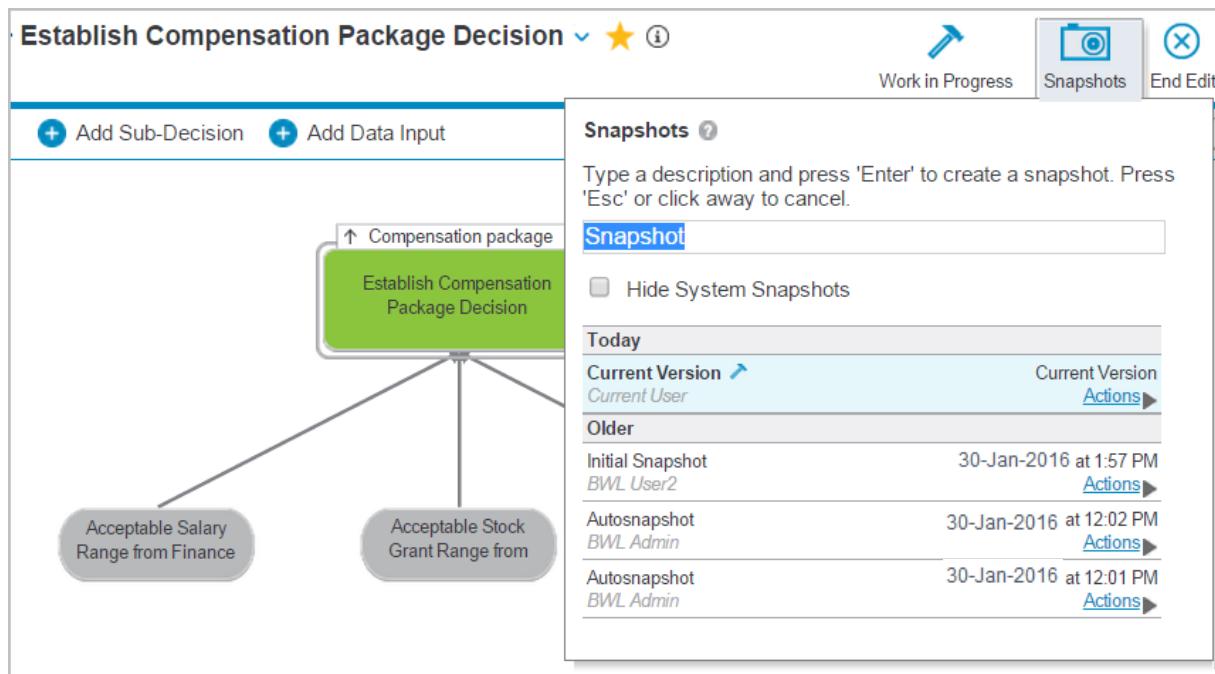
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Figure 3-38. Validating decisions

After a decision is fully documented, experts and stakeholders need to validate it. Blueworks Live has some lightweight process automation features that are useful for automating decision review and approval workflows. Reviewers and approvers can manage their tasks within Blueworks Live and receive automatic email notifications when tasks are waiting for their response. The overall status of review and approval workflows can be monitored in Blueworks Live.

IBM Training 

Tracking changes to decisions



Playback zero - Process Diagram

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Figure 3-39. Tracking changes to decisions

When modeling a decision, the ability to revert to a previous state of the decision can be helpful during early discovery stages. This action can also be useful for managing changes to decisions and for viewing past versions of decisions for audit and compliance purposes. In Blueworks Live, the user can take a snapshot of a decision at any point in time and restore to a previous (or future) version of a decision. They can also *undo* the last change to a decision by using the **Undo** button if they made a simple mistake in which they need to back out.

The screenshot shows the BlueworksLive interface with the 'Decisions' tab selected. A specific decision, 'Establish Compensation Package Decision', is highlighted. A context menu is open over this decision, showing options like 'Export to Word', 'Export Decision', 'Move Item', 'Where Used' (which is currently selected), and 'Copy Decision'. Below the menu, a 'Where Used' section displays three activities that link back to this decision. The interface includes navigation tabs for Work, Community, and Library, and a search/filter bar at the top.

Playback zero - Process Diagram

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Figure 3-40. Finding and sharing decisions

Decisions in the Blueworks Live library can be found by using the search and filter capabilities. And their relationships to other process artifacts can be explored by using the *Where Used* feature. Links to decisions in Blueworks Live can be included in emails and documents. Decision diagrams can be saved as PDF files or printed. And all of the details of a decision can be exported by using Microsoft Excel.

Section recap

- The decision discovery capability of Blueworks Live is 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.

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

Playback zero - Process Diagram

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Figure 3-42. Exercise 4: Creating and modifying a process diagram in IBM Blueworks Live

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

Exercise objectives

After completing this exercise, a student should be able to:

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

3.4. Playback of a process diagram

Playback of a process diagram

Playback zero - Process Diagram

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Figure 3-44. Playback of a process diagram

Topic 4: Playback of a process diagram

Topics

- IBM Blueworks Live process diagram
- Modifying a process diagram
- Decision discovery
-  Playback of a process diagram
- Other features of Blueworks Live

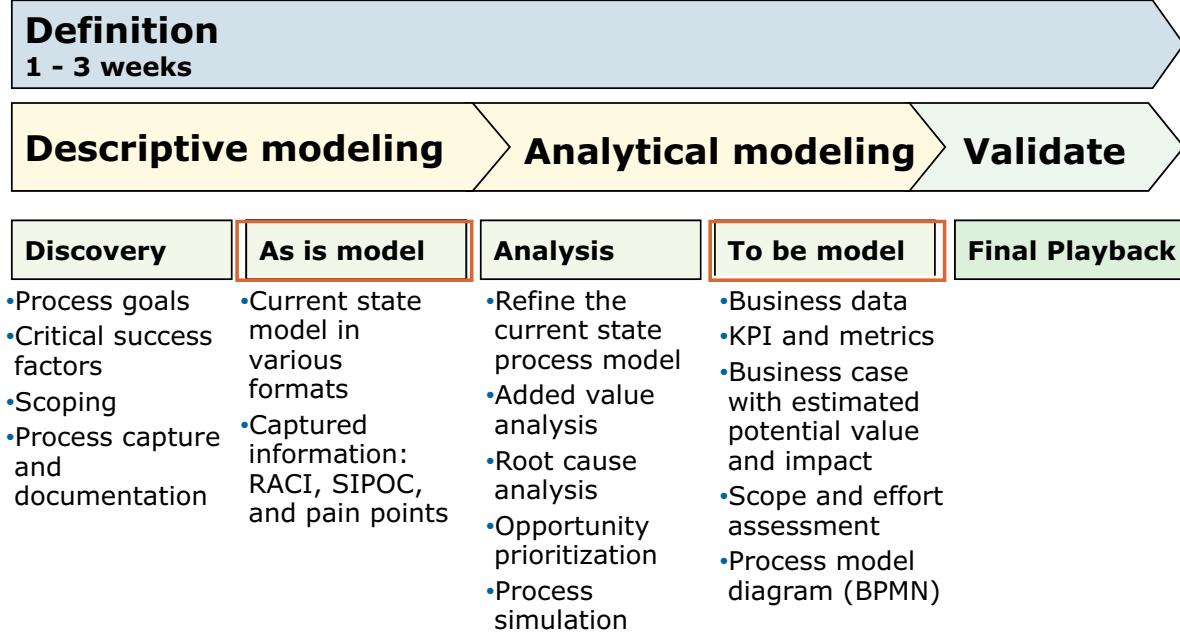
Playback zero - Process Diagram

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Figure 3-45. Topics

Overview

Playback zero



Playback zero - Process Diagram

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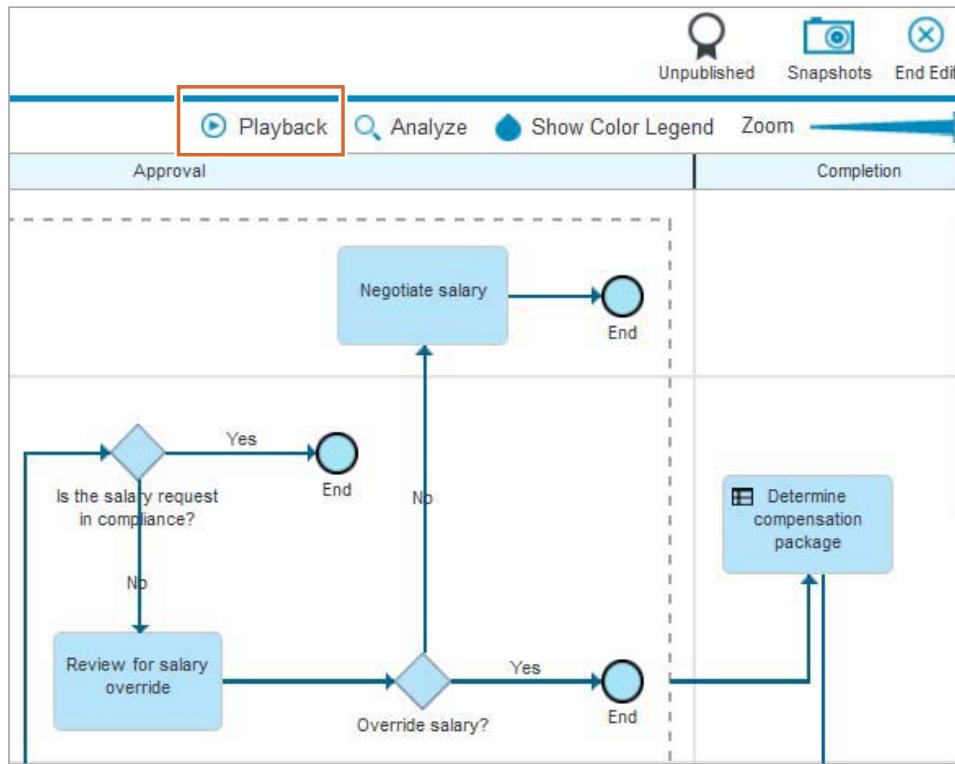
Figure 3-46. Overview

Playbacks in a BPM development effort are typically themed sessions or meetings to review specific work that is accomplished. Themes in the analysis phase of process modeling that are handled in Blueworks Live are “as-is” model reviews, “to-be” model reviews, and any variation that is designated by the BPM development team. These sessions are conducted after the BPM teams and Contributors such as the process owner and process experts exhaust the descriptive or analytical modeling collaboration.

To help conduct these themed sessions with stakeholders, Blueworks Live offers the use of the **Playback** icon in the process diagram mode of a blueprint process. Both the shared and non-shared views provide the Playback functions for a process diagram. Ultimately, it is up to the process owner and BPM team to designate how and when the Playback is conducted.



Conducting a Playback



Playback zero - Process Diagram

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Figure 3-47. Conducting a Playback

When the process author selects the **Playback** option from the menu in the process diagram, the user interface for the blueprint process changes.

The screenshot shows the IBM Training interface with the title "IBM Training" and the "IBM" logo. Below the title, the section "Playback interface" is displayed. The main area features a BPMN process diagram titled "Expenses Reimbursement". The diagram includes nodes like "Start", "File Expense Report", "Is the report complete?", "Approve", "Generate Payment", and "End". A step-through controller at the bottom left shows numbered circles 1 through 6, with circle 1 highlighted in blue. A tooltip above the controller says: "Start creating a playback by selecting any object in the diagram as your starting point." To the right of the diagram is a details pane for "File Expense Report" under the "Participants" tab, showing participants like "Employee", "Business Owners", and "HR Manager". At the bottom right of the interface is an "Exit" button.

Playback zero - Process Diagram © Copyright IBM Corporation 2016

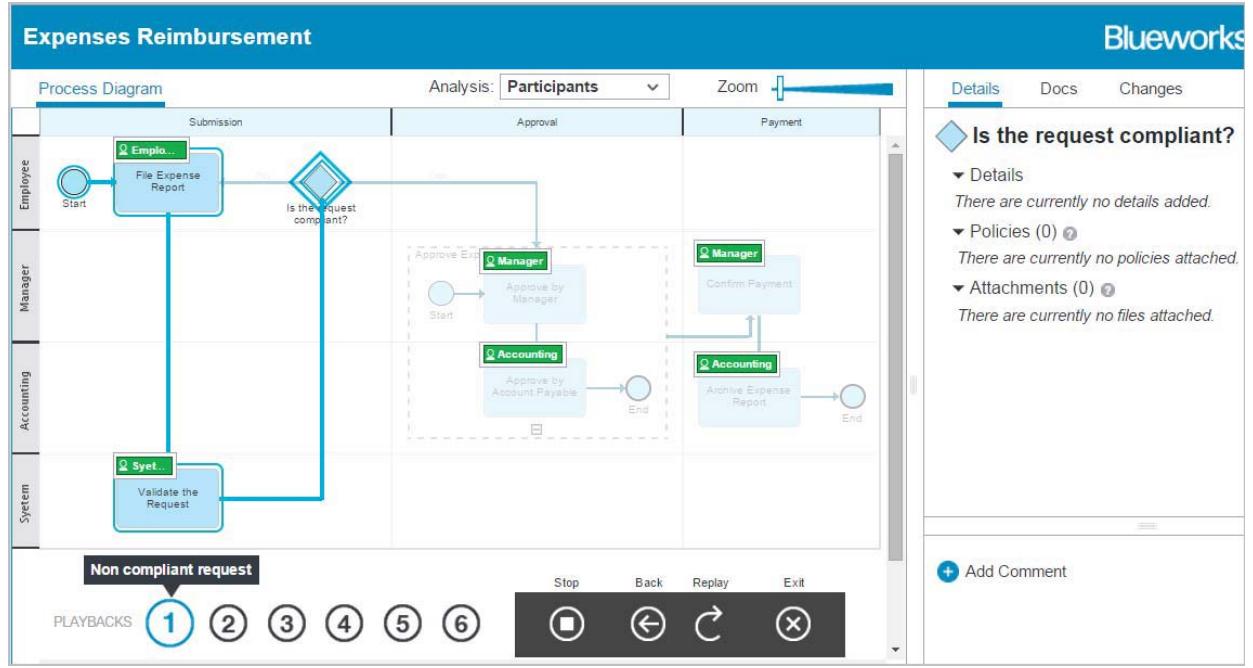
Figure 3-48. Playback interface

The Playback user interface is divided into two main quadrants, the details pane on the right and the process diagram with a step-through Playback controller on the left. If process authors want to end a Playback, they click the X icon in the controller.

Initially, process authors identify the paths to review for the process diagram by clicking the numbered circle icons. They name the path to review for each numbered icon within the process diagram. As they create the path identification, the authors also click the BPMN elements to review in an ordered sequence of events. This effort provides the review session a specific path to review and answer all concerns that arise for that path in the diagram. The more complex the diagram, the more paths there are to review in the Playback session.



Reviewing path 1 in the process diagram



Playback zero - Process Diagram

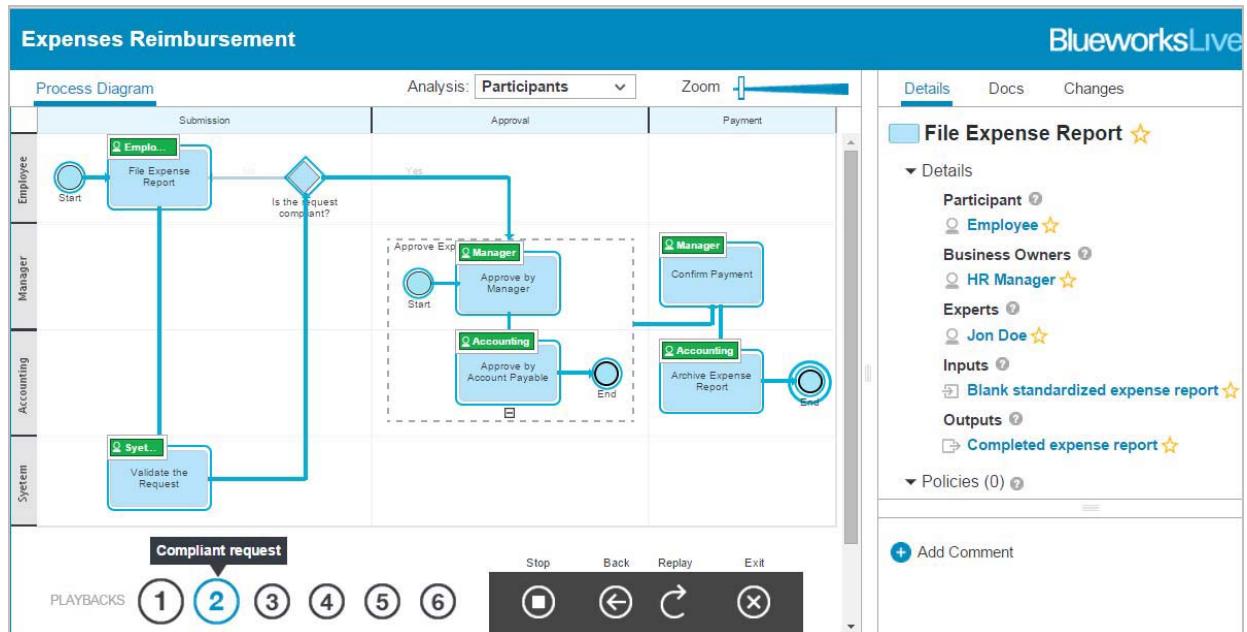
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Figure 3-49. Reviewing path 1 in the process diagram

When the process author or editor designates the review paths for the process diagram, the Playback session is ready to begin. To run the Playback with business stakeholders, the process author selects the number icon to review the specific process path. To step through each process diagram element, the process author clicks the next icon on the controller and allows the review team to read the details for each element on the right side pane.



Reviewing path 2 in the process diagram



Playback zero - Process Diagram

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Figure 3-50. Reviewing path 2 in the process diagram

To conduct the Playback on the second process path and reach consensus on the work that is done to model the diagram, the process author clicks the second icon. The author then clicks the next icon on the controller to step through the process path. Notice that the label provided gives business stakeholders an idea of what path they are reviewing. In this case, it is the compliant request process path in the expense reimbursement process.

Now the “as is” process model for the expense reimbursement is complete. Business stakeholders review the model. If validated, the process author and owner can move on to the next stage in development, the “to be” process modeling.

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

Playback zero - Process Diagram

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Figure 3-51. Exercise 5: Conducting a Playback of the process diagram in IBM Blueworks Live

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

Exercise objectives

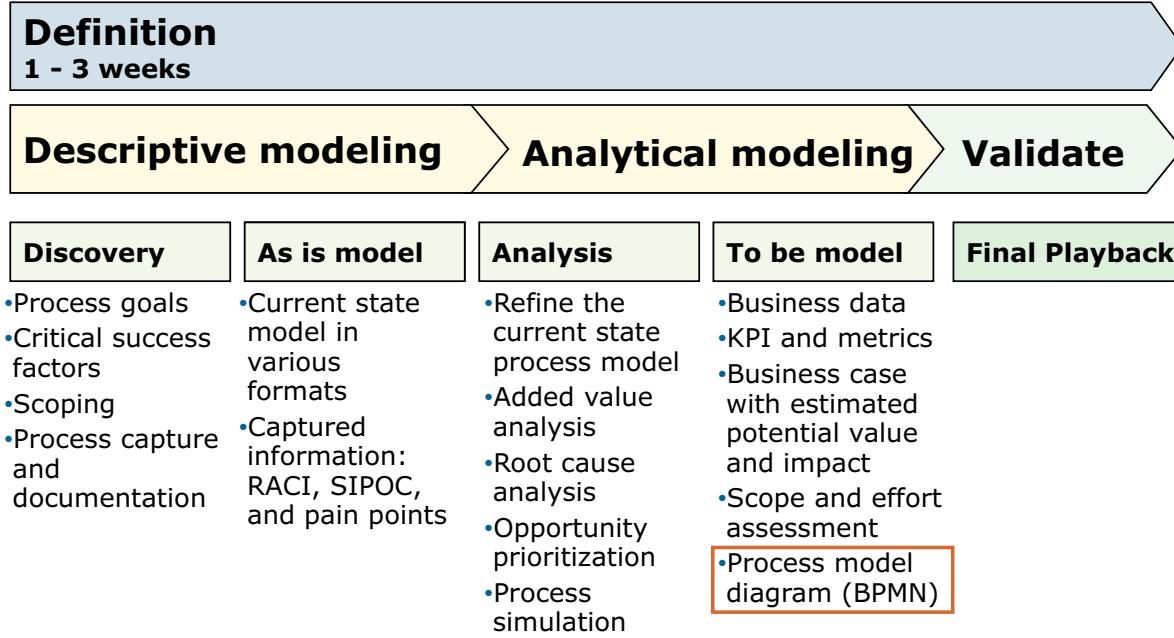
After completing this exercise, a student should be able to:

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



When is the move of the model to IBM Business Process Manager?

Playback zero



Playback zero - Process Diagram

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Figure 3-53. When is the move of the model to IBM Business Process Manager?

A process author is often asked when it is the right time in Playback zero to move to a more robust modeling and implementation. In this case, the move would be to IBM Business Process Manager, a tool that works in sync with IBM Blueworks Live. During the “to be” modeling effort, also known as the analytical modeling refinement, there comes a time when such a move is prudent. As the requirements get closer to functional requirement status in the “to be” model, the right time to move to IBM Business Process Manager is at hand.

IBM Business Process Manager allows developers to subscribe to a Blueworks Live process and bring in the work that is done to then complete the more challenging aspects of the final Playback zero validation. Final Playback for Playback zero can certainly happen in IBM Blueworks Live, but the Playback can also happen in IBM Business Process Manager if more functions are needed to reflect the final “to be” process. With Blueworks Live, the documentation effort maintains a high level of usage, even beyond process discovery and analysis of the business process. Though the process model is now being refined in IBM Business Process Manager, the documentation feature of IBM Blueworks Live continues. Process authors can add as many details as they want because of changes that are made to the process model to keep the blueprint process up-to-date on “to be” and executable model improvements.

To learn more about how to subscribe to IBM Blueworks Live and how to model in IBM Business Process Manager, sign up for the WB801/VB801/ZB801 course: *Modeling in IBM Business Process Manager*.

3.5. Other features of Blueworks Live

Other features of Blueworks Live

Playback zero - Process Diagram

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Figure 3-54. Other features of Blueworks Live

Topic 5: Other features of Blueworks Live.

Topics

- IBM Blueworks Live process diagram
 - Modifying a process diagram
 - Decision discovery
 - Playback of a process diagram
-  Other features of Blueworks Live

Playback zero - Process Diagram

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Figure 3-55. Topics

The screenshot shows the IBM Blueworks Live interface. At the top, there's a blue header bar with the 'IBM Training' logo on the left and the 'IBM' logo on the right. Below the header, the main page title is 'Import Visio 2013 Diagrams'. The page has a navigation bar with 'Work', 'Community', and 'Library' tabs, along with a search bar and user account links ('BWL Admin Admin Help Logout'). On the left, there's a sidebar with 'All Spaces > Training Space' and tabs for 'Overview', 'Users', and 'Stats'. The main content area is a modal dialog titled 'Import'. It asks 'Select the format you would like to import:' and lists three options: 'Microsoft Visio XML Diagram (.vdx or .vsdx)' (selected), 'Business Process Model and Notation (BPMN 2.0)', and 'XML Process Definition Language (XPDL 2.1)'. Each option has a brief description and a 'More Details' link. To the right of the modal, there's a sidebar with a 'Create New' dropdown menu, an 'Import' button highlighted with a red box, and a table with columns 'Type', 'Name', 'Date', and 'Tag'. The table shows one item: 'Training v1' with a star icon and the date 'Dec 21, 2014'.

Playback zero - Process Diagram

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Figure 3-56. Import Visio 2013 Diagrams

IBM Blueworks Live supports Visio, and you can import a Visio diagram into a space, and you can import either Visio 2013 (.vsdx) format or the Visio XML Drawing file format (.vdx).

Governance with Blueworks Live

- The Governance process includes the following overall steps:
 - Defining
 - Launching
 - Participating
 - Publishing

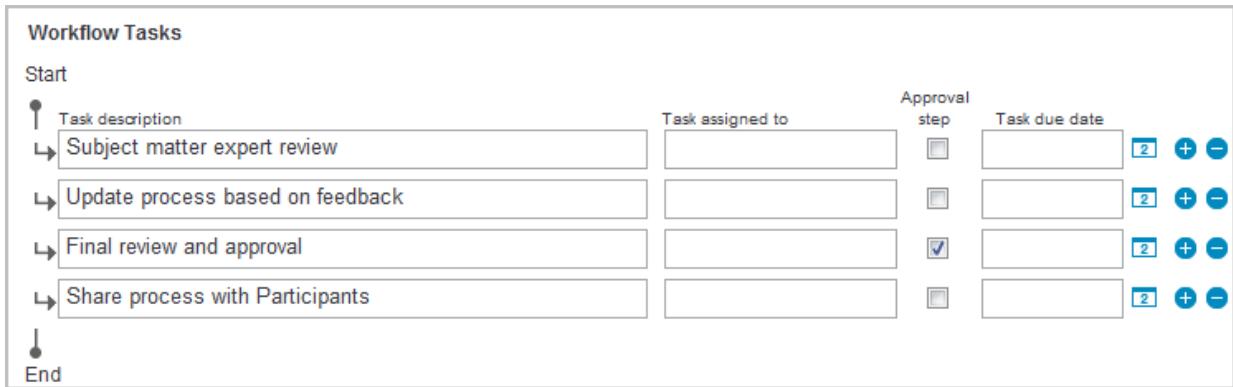
Playback zero - Process Diagram

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Figure 3-57. Governance with Blueworks Live

Defining

- Defining a governance process app is the same as defining an automated process
- Blueworks Live has parallel and sequential activities within a single process app

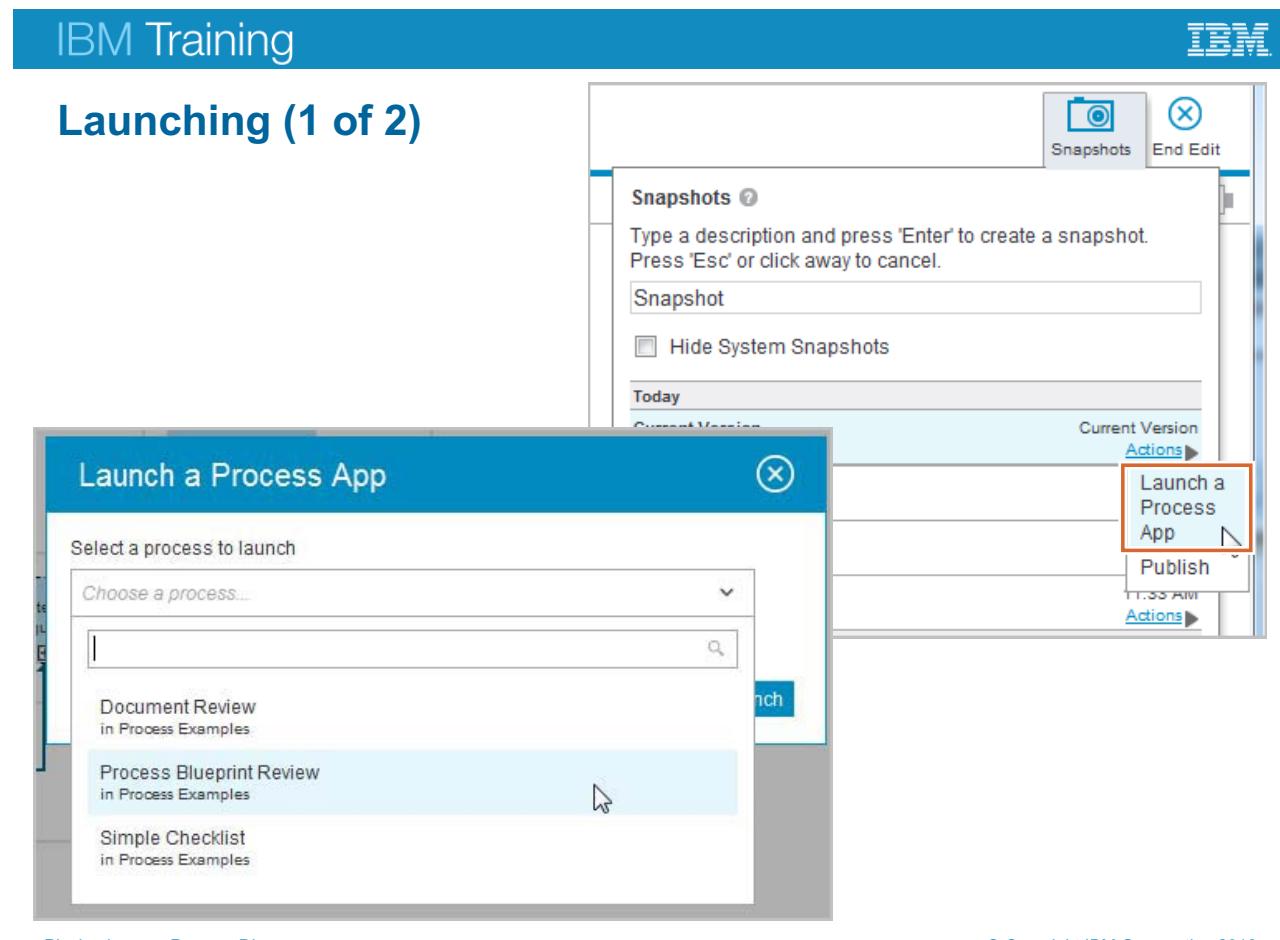


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Figure 3-58. Defining

Defining a governance process app is the same as defining an automated process, and Blueworks Live has parallel and sequential activities within a single process app



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Figure 3-59. Launching (1 of 2)

To launch a Governance process while inside the Process Diagram, go to the **Snapshots** menu and select the version of the process you for which you want to launch the Governance process.

Next, click **Actions > Launch a Process App**. A window is displayed in which you are prompted to select the Process App you want to launch. Select **Process Blueprint Review**, and then click **Launch**.

The screenshot shows the BlueworksLive interface for launching a process. At the top, there's a navigation bar with 'IBM Training' on the left and the IBM logo on the right. Below it, the main title is 'Launching (2 of 2)'. The page header includes 'User 2 Admin Help Logout' and a search bar. The main content area is titled 'My Processes> Process Blueprint Review' with an edit icon. It displays a 'Workflow Tasks' section with the following details:

Task description	Task assigned to	Approval step	Task due date
Subject matter expert review	User 2	<input type="checkbox"/>	2016-03-08 [edit] [+]
Update process based on feedback	User 2	<input type="checkbox"/>	2016-03-10 [edit] [+]
Final review and approval	User 2	<input type="checkbox"/>	2016-03-14 [edit] [+]
Share process with Participants	User 2	<input type="checkbox"/>	2016-03-18 [edit] [+]

Below the tasks, there's a section for 'Email me when this process is completed or cancelled.' with a checked checkbox. At the bottom, a 'Launch' button is present with the note: 'Clicking launch will start the process and send out task assignment notifications.'

Playback zero - Process Diagram

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Figure 3-60. Launching (2 of 2)

You must populate the subject and details sections as necessary to inform the participants. Then, make sure that the tasks are correct, they are assigned to the proper person, and the due date is accurate before you click **Launch**. If you must modify any tasks, assignees, or due dates, you must do so before you click **Launch** (you can always reassign tasks at run time). As the person who configures the governance process, you can be notified when the process is completed by selecting **Email me when this process is completed or canceled**.

The arrows at the left side of the workflow tasks indicate the flow of the process (parallel and sequential tasks are present in this process).

The screenshot shows the IBM Training interface. At the top left is the 'IBM Training' logo. At the top right is the 'IBM' logo. Below the header, the title 'Participating (1 of 2)' is displayed. To the right of the title is a user interface for managing process steps. It includes a toolbar with icons for 'Work in Progress' (highlighted with a red box), 'Snapshots', and 'End Edit'. Below the toolbar are buttons for 'Low Data Inputs', 'Undo', 'Zoom', and a scroll bar. A search bar is also present.

The screenshot shows the BlueworksLive interface. At the top left is the 'BlueworksLive' logo. At the top right are links for 'Work', 'Community', 'Logout', and a search bar. Below the header, the title 'Process Blueprint Review: Hiring Requisition > Subject matter expert review' is shown. On the right side of this title is a 'Complete' button highlighted with a yellow box. The main area displays a process step titled 'Establish Compensation Package Decision' with a star icon and a blue info icon. Below the title are buttons for '+ Add Tags', 'Decision Diagram', 'Add Sub-Decision', and 'Add Data Input'. At the bottom are standard navigation and zoom controls.

Playback zero - Process Diagram

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Figure 3-61. Participating (1 of 2)

If you are a participant in a governance process, you receive an email that indicates that a governance process was launched. This email provides you with a link to your activity and you see the **Work in Progress** icon if you open the process.

When you start IBM Blueworks Live from the provided link, you are on the instance page where you can follow a link to the artifact on which you must work. When you open the artifact, it brings you to a read-only view of the artifact for which the review was requested, unless you are an editor and have the correct permissions in the space. If you are a participant that is involved in a review step, you see a **Complete** button on the right side in the yellow bar.

The screenshot shows the BlueworksLive application interface. At the top, there's a blue header bar with the IBM Training logo on the left and the IBM logo on the right. Below the header is a main navigation bar with 'BlueworksLive' on the left, 'Work' and 'Community' tabs, a search bar, and user information 'BWL User2 Help Logout'. The main content area has a yellow header bar with the text 'Process Blueprint Review, Hiring Requisition > Final review and approval'. On the right side of this bar are two blue buttons with white text: 'Approve' and 'Reject', which are highlighted with a red border. Below the yellow bar, the main workspace shows a process diagram titled 'Establish Compensation Package Decision'. The diagram includes various icons and buttons for editing. At the bottom of the workspace, there are buttons for 'Decision Diagram', 'Add Sub-Decision', 'Add Data Input', 'Undo', 'Zoom', and 'End Edit'. The overall interface is clean and modern, typical of a business process management tool.

Playback zero - Process Diagram

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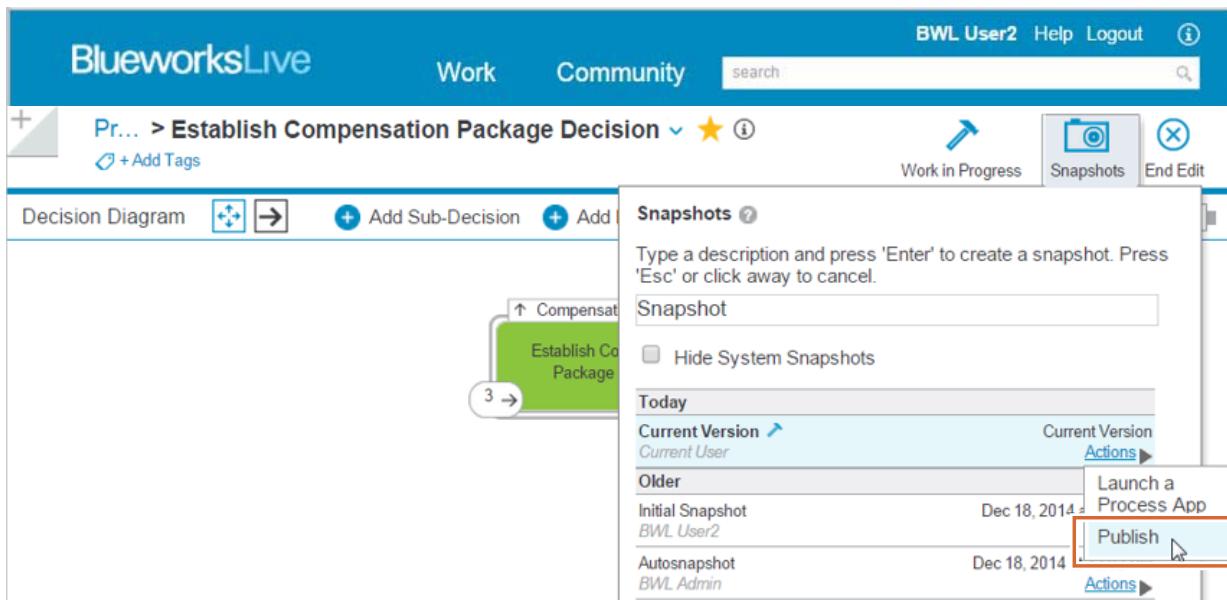
Figure 3-62. Participating (2 of 2)

If you are a participant that is involved in an approval step, you see a yellow bar at the top of the window with two buttons: **Approve** and **Reject**.

IBM Training



Publishing



The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'BWL User2', 'Help', and 'Logout'. Below the navigation is a search bar and some icons for 'Work in Progress', 'Snapshots', and 'End Edit'. The main area displays a process diagram with a green rounded rectangle labeled 'Establish Co Package'. To the left of the diagram are buttons for 'Decision Diagram', 'Add Sub-Decision', and 'Add'. On the right, there's a 'Snapshots' section with a sub-menu for creating a new snapshot. The 'Actions' menu for the current version is open, showing options like 'Launch a Process App' and 'Publish', with 'Publish' highlighted and boxed.

Playback zero - Process Diagram

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Figure 3-63. Publishing

After an artifact is reviewed, the person who originated the governance process can publish the artifact from the **Snapshot** menu by selecting the reviewed version, going through the **Actions** menu, and selecting **Publish**. You do not have to wait until the governance process is approved to publish it.

By using the Governance feature, you can capture the review, commentary, or approvals on a process or decision. Launching a process on a specific version of the artifact enables you to continue modifying and improving your artifact while still reflecting that a particular version was officially reviewed or approved.

Section recap

- IBM Blueworks Live supports the Visio import either Visio 2013 (.vsdx) format or the Visio XML Drawing file format (.vdx).
- The Governance process includes the following overall steps:
 - Defining
 - Launching
 - Participating
 - Publishing

Figure 3-64. Section recap

Learn more about Blueworks Live and process modeling

- A list of courses to learn more about Blueworks Live administration, analytical process modeling, and process modeling in IBM Business Process Manager is provided here:
 - Process Modeling 101 (a tutorial in the Blueworks Live Help section on collaboration meetings in Blueworks Live)
 - ZB030 or ZB032 IBM Blueworks Live Account Administration
 - ZB009 Process Analysis Methods I
 - WB801, VB801, or ZB801 Modeling in IBM Business Process Manager

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Figure 3-65. Learn more about Blueworks Live and process modeling

If you want to learn more about Blueworks Live administration, analytical process modeling, and process modeling in IBM Business Process Manager, the courses that are listed are available.

Unit summary

- Enhance a Process Diagram in a Blueworks Live blueprint
- Examine the decision discovery
- Describe the governance support with Blueworks Live
- Conduct a Playback of the process diagram in Blueworks Live

Playback zero - Process Diagram

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Figure 3-66. Unit summary

Review questions

1. True or False: A graphical representation, or diagram, of the business process that is universally understood and easily communicated.

2. Which of the following standards provides the graphical notation of a business process that is readily understandable by all?
 - A. Business Process Management and Notation (BPMN)
 - B. Business Process Model and Names (BPMN)
 - C. Business Process Model and Notation (BPMN)
 - D. Business Process Management and Modeling (BPMM)

3. Which of the following elements is not a BPMN element?
 - A. Gateway
 - B. Activity
 - C. Flow
 - D. Milestone



Playback zero - Process Diagram

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Figure 3-67. Review questions

Write your answers here:

- 1.

- 2.

- 3.

Review answers

1. True or False: A graphical representation, or diagram, of the business process that is universally understood and easily communicated.
The answer is True.
2. Which of the following standards provides the graphical notation of a business process that is readily understandable by all?
 - A. Business Process Management and Notation (BPMN)
 - B. Business Process Model and Names (BPMN)
 - C. Business Process Model and Notation (BPMN)
 - D. Business Process Management and Modeling (BPMM)The answer is C.
3. Which of the following elements is not a BPMN element?
 - A. Gateway
 - B. Activity
 - C. Flow
 - D. MilestoneThe answer is D.

Playback zero - Process Diagram

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Figure 3-68. Review answers



Unit 4. Course summary

Estimated time

00:15

Overview

This unit summarizes the course and provides information for future study.

Unit objectives

- Explain how the course met its learning objectives
- Identify other IBM Training courses that are related to this topic
- Access the IBM Training website
- Locate appropriate resources for further study

Course summary

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Figure 4-1. Unit objectives

Course objectives

- 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

Course summary

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Figure 4-2. Course objectives



To learn more on the subject

- IBM Training website:
www.ibm.com/training
- Blueworks Live Product Overview
<https://www.blueworkslive.com/scr/help/>
- Using Blueworks Live
<https://www.blueworkslive.com/scr/help/usingblueworkslive.html>
- Blueworks Live FAQ
<https://www.blueworkslive.com/scr/help/faq.html>
- Blueworks Live Forums/Community
<https://www.blueworkslive.com/scr/help/forums.html>
- IBM Redbooks
 - Discovering the Decisions within Your Business Processes using IBM Blueworks Live:
<http://www.redbooks.ibm.com/abstracts/redp4993.html?Open>
 - Process Discovery Best Practices Using IBM Blueworks Live:
<http://www.redbooks.ibm.com/abstracts/redp5111.html?Open>

Course summary

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Figure 4-3. To learn more on the subject

Enhance your learning with IBM resources

Keep your IBM Cloud skills up-to-date

- IBM offers resources for:
 - Product information
 - Training and certification
 - Documentation
 - Support
 - Technical information



- To learn more, see the IBM Cloud Education Resource Guide:
 - www.ibm.biz/CloudEduResources

Course summary

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Figure 4-4. Enhance your learning with IBM resources

Unit summary

- Explain how the course met its learning objectives
- Identify other IBM Training courses that are related to this topic
- Access the IBM Training website
- Locate appropriate resources for further study

Course summary

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Figure 4-5. Unit summary



Course completion

You have completed this course:

Process Discovery and Modeling in IBM Bluworks Live

Any questions?



Course summary

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Figure 4-6. Course completion

Appendix A. List of abbreviations

A

Ajax Asynchronous JavaScript and XML

AMD Asynchronous Module Definition

API application programming interface

B

B2B business-to-business

BAL Business Action Language

BPD business process definition

BPM business process management

BPMN Business Process Model and Notation

BPMS business process management system

BWL Blueworks Live

C

CEO chief executive officer

CSS Cascading Style Sheets

CS coach service

CV coach view

D

DB database

DB2 Database 2

DM Discovery Map

DOM Document Object Model

E

EJB Enterprise JavaBeans

ENV environment variable

EPV exposed process value

ERP enterprise resource planning

ESB enterprise service bus

G

GB gigabyte

GUI graphical user interface

H

HR human resources

HS human service

HTML Hypertext Markup Language

HTTP Hypertext Transfer Protocol
HTTPS Hypertext Transfer Protocol Secure

I

IE Internet Explorer
IME intermediate message event
I/O input/output
IP Internet Protocol
IT information technology

J

J2C J2EE Connector architecture
J2EE Java 2 Platform, Enterprise Edition
JAR Java archive
JDBC Java Database Connectivity
JMS Java Message Service
JNDI Java Naming and Directory Interface
JSAPI JavaScript API
JSON JavaScript Object Notation
JVM Java virtual machine

K

KPI key performance indicator

L

LDAP Lightweight Directory Access Protocol

M

MIL multi-instance loop

O

OMG Object Management Group
OS operating system

P

PC Process Center
PD Process Diagram
PDF Portable Document Format
PDW Performance Data Warehouse
POJO plain old Java object
PS Process Server

R

RACI responsible, accountable, consulted, informed
REST Representational State Transfer
ROM Rough order of magnitude

RUP Rational Unified Process

S

SDK software development kit

SIPOC suppliers, inputs, processes, outputs, customers

SLA service level agreement

SMTP Simple Mail Transfer Protocol

SOA service-oriented architecture

SOAP a lightweight, XML-based protocol for exchanging information in a decentralized, distributed environment. Usage note: SOAP is not an acronym; it is a word (formerly an acronym for Simple Object Access Protocol)

SOR system of record

SQL Structured Query Language

SSL Secure Sockets Layer

SSO single sign-on

T

TS task service

U

UCA undercover agent

UI user interface

UML Unified Modeling Language

URI Uniform Resource Identifier

URL Uniform Resource Locator

V

VM virtual machine

W

W3C World Wide Web Consortium

WS web services

WSDL Web Services Description Language

WYSIWYG what you see is what you get

X

XML Extensible Markup Language

XPath XML Path Language

XPDL XML Process Definition Language

XSD XML Schema Definition

XSL Extensible Stylesheet Language

XSLT Extensible Stylesheet Language Transformation



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