

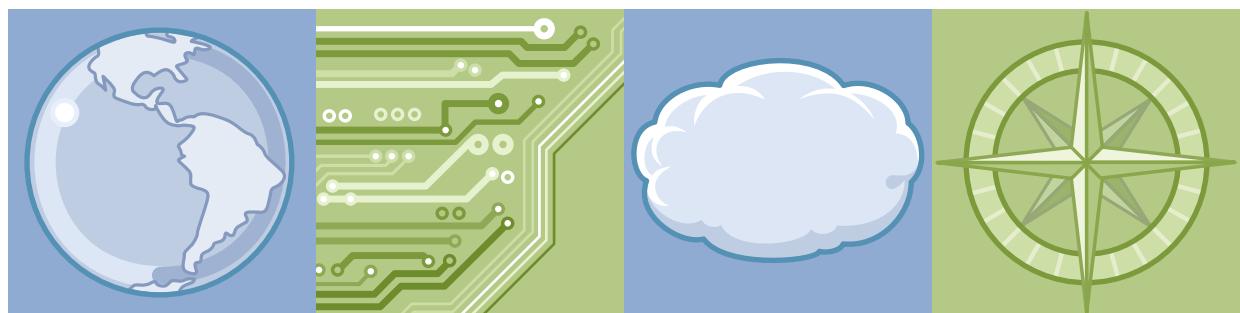


IBM Training

Student Notebook

IBM Blaworks Live Account Administration

Course code ZB030 ERC 2.0



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Middleware

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January 2016 edition

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Contents

Trademarks	vii
Course description	ix
Agenda	xi
Unit 1. Managing users and user access	1-1
What this unit is about	1-1
What you should be able to do	1-1
How you will check your progress	1-1
Unit objectives	1-2
Topics	1-3
Getting started	1-4
Blueworks Live overview	1-5
Blueworks Live access	1-6
Blueworks Live account structure	1-7
More on account access	1-8
What is a space?	1-9
Topic review	1-10
Account level access	1-11
Overview	1-12
Inviting users	1-13
License (user) types	1-14
User types: Editor	1-15
User types: Contributor	1-16
User types: Community member	1-17
Inviting users: Troubleshooting	1-18
Steps to resend an invitation	1-19
What happens if the user settings are wrong?	1-20
Resetting user settings	1-21
Resetting user settings, continued	1-22
Resetting user settings, continued	1-23
Account administrator	1-24
Topic review	1-25
Space level access	1-26
Space access overview	1-27
Creating a space	1-28
Space details	1-29
Space user permissions	1-30
Space user permissions: Blueprint processes	1-31
Space user permissions: Automate processes	1-32
Space user permissions: Manage space	1-33
Overall space management	1-34
Archive a space	1-35
Copy a space	1-36
Topic review	1-37
Exercise 1:Creating a space and managing users	1-38
Exercise objectives	1-39

Unit summary	1-40
Unit 2. Account management	2-1
What this unit is about	2-1
What you should be able to do	2-1
How you will check your progress	2-1
Unit objectives	2-2
Topics	2-3
File management	2-4
Overview	2-5
Manage files	2-6
Remove versus delete files	2-7
Sorting with color views	2-8
Topic review	2-9
Glossary management	2-10
Overview	2-11
Glossary management	2-12
Glossary user permissions	2-13
Property values	2-14
Filtering	2-15
Where used	2-16
Where used	2-17
Merge	2-18
Merge values dialog	2-19
Other merge considerations	2-20
Topic review	2-21
Managing properties	2-22
Overview	2-23
Standard properties	2-24
Custom properties	2-25
Topic review	2-26
Account customization	2-27
Overview	2-28
Preferences	2-29
Branding: Custom logo and color scheme	2-30
Branding: Custom notifications	2-31
Branding: Custom logo on Word export	2-32
Lock and prevent changes	2-33
Topic review	2-34
Security	2-35
Overview	2-36
Security restrictions	2-37
Authentication	2-38
Topic review	2-39
Account Information and Billing Details	2-40
Account Information	2-41
Billing Details	2-42
Exercise 2Customize an account	2-43
Exercise objectives	2-44
Exercise 3Manage the glossary	2-45
Exercise objectives	2-46

Exercise 4Delete an attachment	2-47
Exercise objectives	2-48
Unit summary	2-49
Unit 3. Blueworks Live enhancements.....	3-1
What this unit is about	3-1
What you should be able to do	3-1
How you will check your progress	3-1
Unit objectives	3-2
Topics	3-3
Policies	3-4
Overview	3-5
Copy or archive a policy	3-6
Policy page	3-7
Description section	3-8
References section	3-9
Where Used section	3-10
Where Used: Activity example	3-11
Adding a policy to a process	3-12
Topic review	3-13
Where Used	3-14
Overview	3-15
Where Used dialog	3-16
Following an item	3-17
Topic review	3-18
Playback	3-19
Overview	3-20
Playback user interface	3-21
Playback Details panel	3-22
Playback diagram menu	3-23
Process diagram	3-24
Conducting a playback	3-25
Group defined process diagram path	3-26
Topic review	3-27
Governance	3-28
Overview	3-29
Governance functionality	3-30
Governance functionality (cont.)	3-31
Review governance history for auditing	3-32
Exercise 5Capturing a policy in a Blueworks Live blueprint	3-33
Exercise objectives	3-34
Exercise 6Conducting a playback	3-35
Exercise objectives	3-36
Unit summary	3-37
Unit 4. Course summary	4-1
What this unit is about	4-1
What you should be able to do	4-1
Unit objectives	4-2
Course learning objectives	4-3
Class evaluation	4-4

To learn more on this WebSphere subject	4-5
Training path	4-6
References	4-7
Unit summary	4-8
Appendix A. List of abbreviations.....	A-1

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Course description

IBM Blueworks Live Account Administration

Duration: 4 hours

Purpose

In this course, you learn how to administer Blueworks Live, manage accounts, and use enhanced product features. The course is designed for advanced business users who have experience in creating, analyzing, and documenting business processes with Blueworks Live. The first section of the course, “Managing users and user access,” teaches you how to manage users and account spaces. The second section, “Account management,” covers how to customize accounts, how to manage the glossary, and other account management needs. In the third section, “Blueworks Live enhancements,” you learn how to capture policies and conduct playbacks in Blueworks Live. Lab exercises throughout the course reinforce the concepts that you learn and allow you to practice managing Blueworks Live. These exercises require an established Blueworks Live account, which your organization must provide for you.

Audience

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

Prerequisites

Before taking this course, you should successfully complete course ZB031, *Process Discovery and Modeling in IBM Blueworks Live*.

Objectives

After completing this course, you should be able to:

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

Agenda

- Course introduction
- Unit 1. Managing users and user access
- Exercise 1. Creating a space and managing users
- Unit 2. Account management
- Exercise 2. Customizing an account
- Exercise 3. Managing the glossary
- Exercise 4. Deleting an attachment in a project
- Unit 3. Blueworks Live enhancements
- Exercise 5. Capturing a policy in a Blueworks Live blueprint
- Exercise 6. Conducting a playback
- Unit 4. Course summary

Unit 1. Managing users and user access

What this unit is about

This unit reviews the methods that are used to manage users and user access in a Bluetworks Live account and in a Bluetworks Live space. You also learn about the differences between an account and a space, which are important foundational concepts for understanding how to manage users in Bluetworks Live.

What you should be able to do

After completing this unit, you should be able to:

- Invite users to a specific Bluetworks Live account based on their designated roles
- Grant users specific task-based permissions for a space in Bluetworks Live

How you will check your progress

- Exercise 1

Unit objectives

After completing this unit, you should be able to:

- Invite users to a specific Blueworks Live account based on their designated roles
- Grant users specific task-based permissions for a space in Blueworks Live

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Figure 1-1. Unit objectives

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Notes:



Topics

The topics for this unit are:

- Getting started
- Account level access
- Space level access

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Figure 1-2. Topics

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Notes:



Getting started



Managing users and user access

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10.1

Figure 1-3. Getting started

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Notes:



Blueworks Live overview

A screenshot of the BlueworksLive website. At the top, there's a navigation bar with the 'BluworksLive' logo, a search bar, and a 'Log In' button. A vertical sidebar on the left has a 'Weekly Demo' button. The main content area features a large central box with the heading 'Process made simple' and a subtext: 'Get rid of sticky notes and generic drawing software and see what an easy-to-use process modeling tool can do for your business.' Below this is an orange 'Try it now!' button. To the right of the central box is a smiling woman with glasses, pointing towards the camera. The background of the page is a chalkboard with various process flow diagrams drawn on it. At the bottom, there's a section titled 'Model and improve your business processes' with a subtext: 'Capture process knowledge. Drive out inefficiencies and improve business operations.' and a 'Learn more' button next to a small icon.

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Figure 1-4. Blueworks Live overview

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Notes:

Blueworks Live access

- When signing up in Blueworks Live, the user creates an account

Blueworks Live makes drawing tools obsolete with a dedicated, easy-to-use process modeling workspace in the cloud.

- Intuitive, business-friendly interface
- Work collaboratively and see changes dynamically
- Shared central repository ensures that process models are always current and up-to-date

"As soon as we saw Blueworks Live we recognized it would allow a lot of people to participate quickly... The results were amazing, including helping us win the coveted Malcolm Baldrige award."

Carla Wolfe
AVP of Enterprise Performance Excellence
Elevations Credit Union

First name
Last name
Company
Business email
Job title
Phone
Country

Have a PROMO CODE?

Read our [privacy policy](#)

I accept the [Agreement for Evaluation of SaaS Offering](#)

Start My Free 30 Day Trial

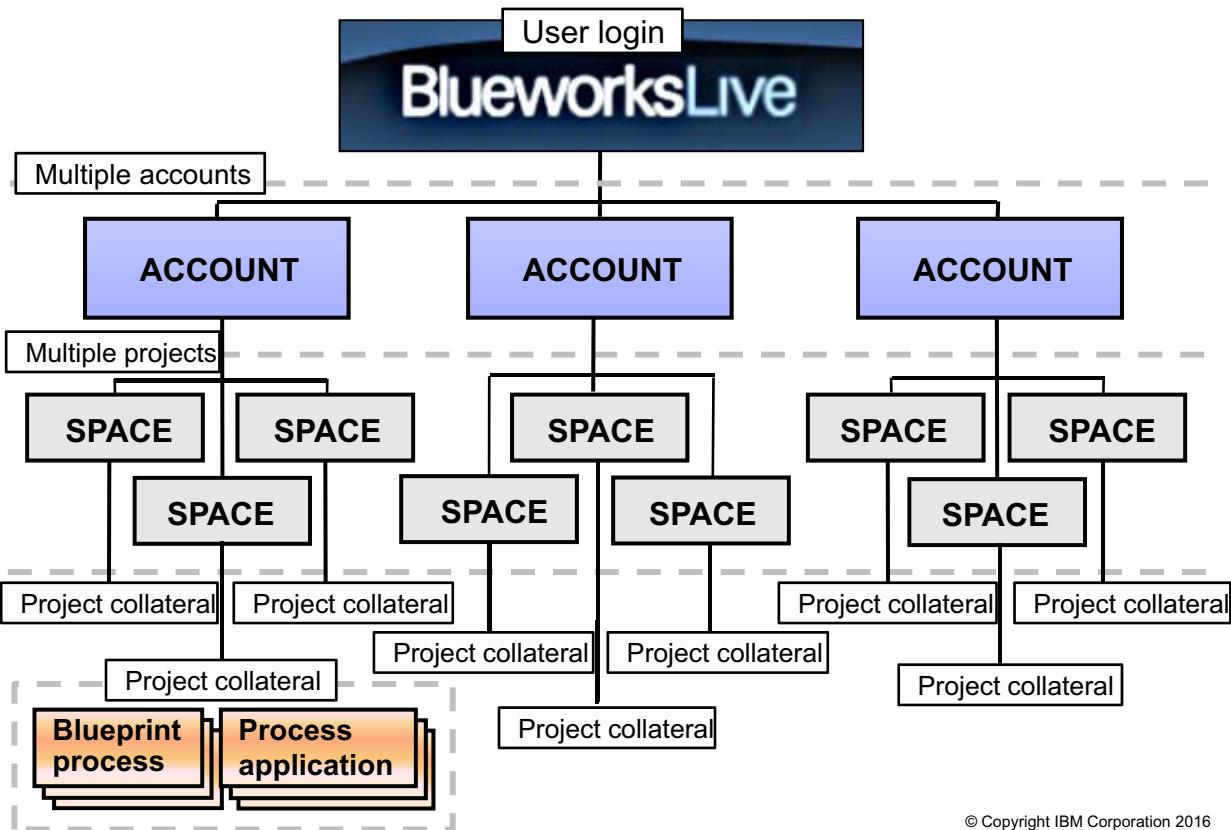
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Figure 1-5. Blueworks Live access

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Notes:

Blueworks Live account structure



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Figure 1-6. Blueworks Live account structure

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Notes:

More on account access

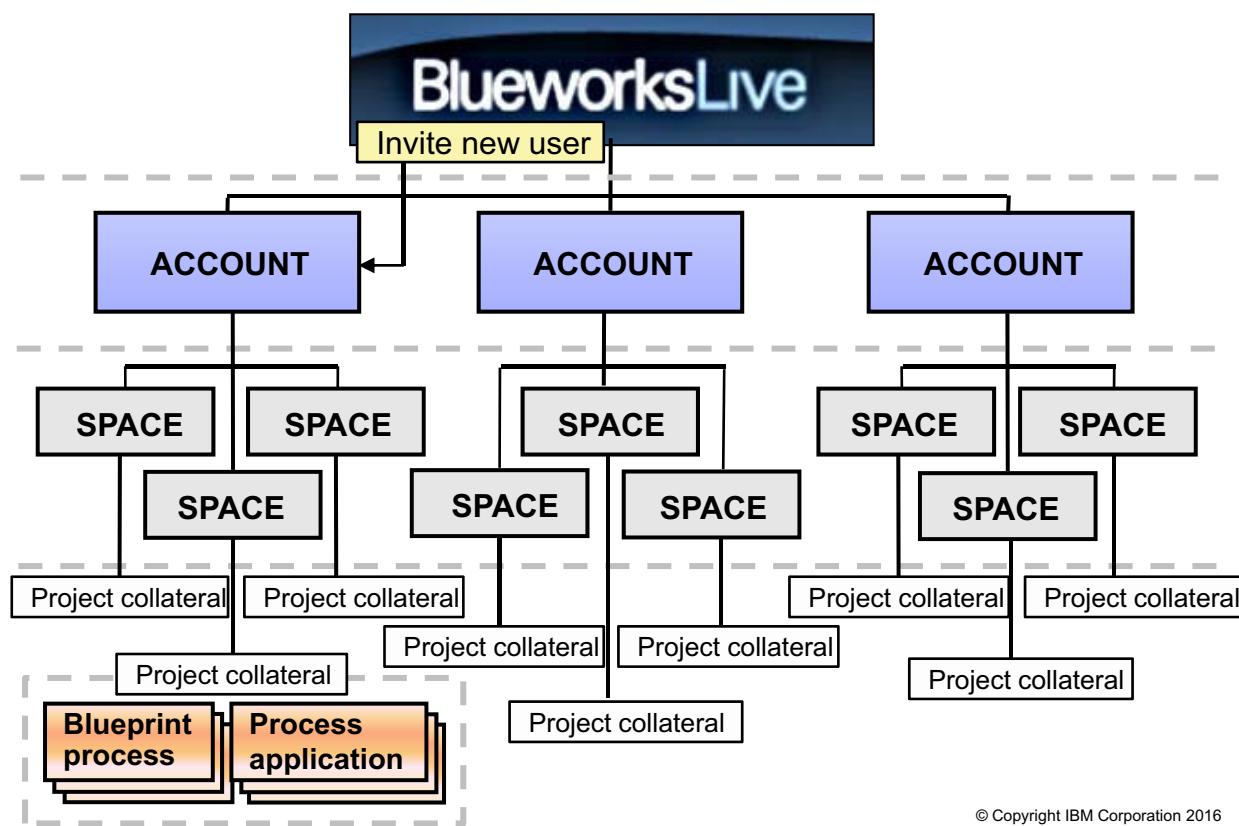
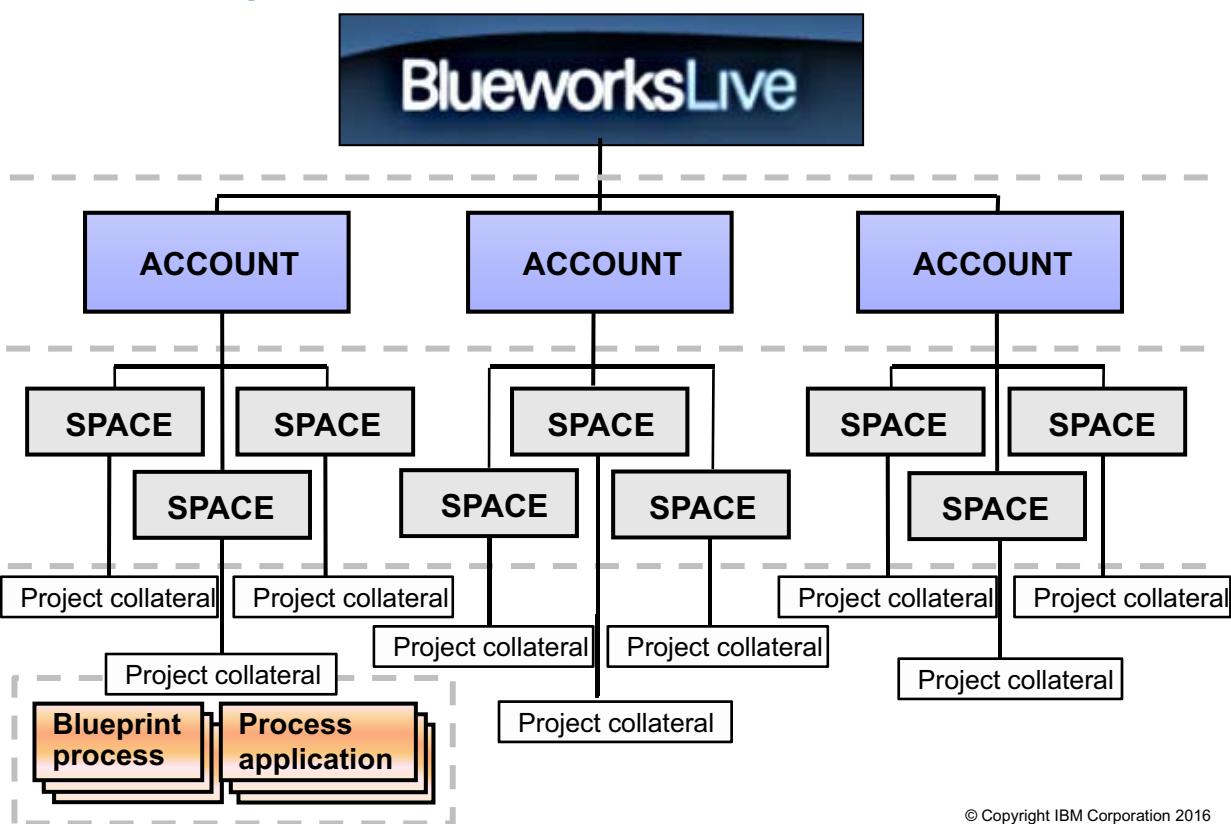


Figure 1-7. More on account access

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Notes:

What is a space?



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Figure 1-8. What is a space?

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Notes:



Topic review

- A Blueworks Live account can be set up at the main page
- A new account provides the user administration privileges
- Users can have multiple accounts through invitations to participate in another user's account
- A space in an account is essentially the project folder for Blueprint processes
- The space owner provides access to a space and the permission type

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Figure 1-9. Topic review

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Notes:



Account level access



Figure 1-10. Account level access

ZB0302.0

Notes:



Overview

- Account level access can be provided to invited users through designated license types that depend on the licenses that are available

BlueworksLive

Email
myemail@mail.com

Password

Remember my email Log in

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

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

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

Latest news...

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

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

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

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

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

The January 2014 release is here with Space Summary, Space, Glossary and Account Export Enhancements, and Space Statistic Enhancements.

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Figure 1-11. Overview

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Notes:

Inviting users

BlueworksLive

Work Community Library

User 1 Admin Help Logout ?

search 🔍

Tasks assigned to me Work I've launched Work I'm following Work Stats

Filter Open tasks | Completed tasks

▼ Tasks Due Today 0

You have no tasks due today.

▼ Tasks Due This Week 0

Example

My Task Assignments

Category	Count
Overdue	4
Today	1
Thursday	2
Friday	3
Later	6
No Due Date	5

Real-time Task Details

Blueworks Live provides you with up-to-date information to help you manage your task assignments and work items. Select the Automate a Process button to configure and run a process in less than 10 minutes.

2 users waiting
23 open tasks
75 % of your tasks

IBM Blueworks Live Terms of Use

Invite New Users

LAUNCH A PROCESS

Filter

⚙️ Create a Checklist
⚙️ Submit Document for Review
⚙️ Submit Process for Review

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Figure 1-12. Inviting users

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Notes:



License (user) types

Who would you like to invite?

An email will be sent to the addresses you provide containing instructions regarding the invitation.

separate email addresses with a comma

User type:

Editors create Apps. They can work and have access to process communities.

Send Invite

Invite New Users

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Figure 1-13. License (user) types

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Notes:



User types: Editor

The account tasks for an editor license type:

- Create Blueprint processes
- Automate process applications
- Edit Blueprint processes and process applications
- Add comments on Blueprint processes
- Start process applications
- Create and edit posts in the community section
- Review, approve, and analyze blueprint processes
- Import and export blueprint processes

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Figure 1-14. User types: Editor

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Notes:



User types: Contributor

The account tasks for a contributor license type:

- Automate process applications
- View shared Blueprint processes as READ ONLY
- Add comments on shared Blueprint processes
- Start process applications
- Create and edit posts in the community section
- Review, approve, and analyze blueprint processes
- Import and export blueprint processes

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Figure 1-15. User types: Contributor

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Notes:



User types: Community member

The account task for a contributor license type:

- Create or edit posts in the community section

BlueworksLive

Work **Community** Library

PRIVATE ACTIVITY STREAM

Date User Process Space

New Post Expand All | Collapse

All Activity Followed Items ★

Posts

QUICK LINKS

Processes Decisions Policies Spaces My Tasks

You created a post 1:44 pm

BPMN and Business Process Architecture

BPMN and Business Process Architecture is discussed

Add Comment

You made 17 changes to Claims Payment process in Training Space space

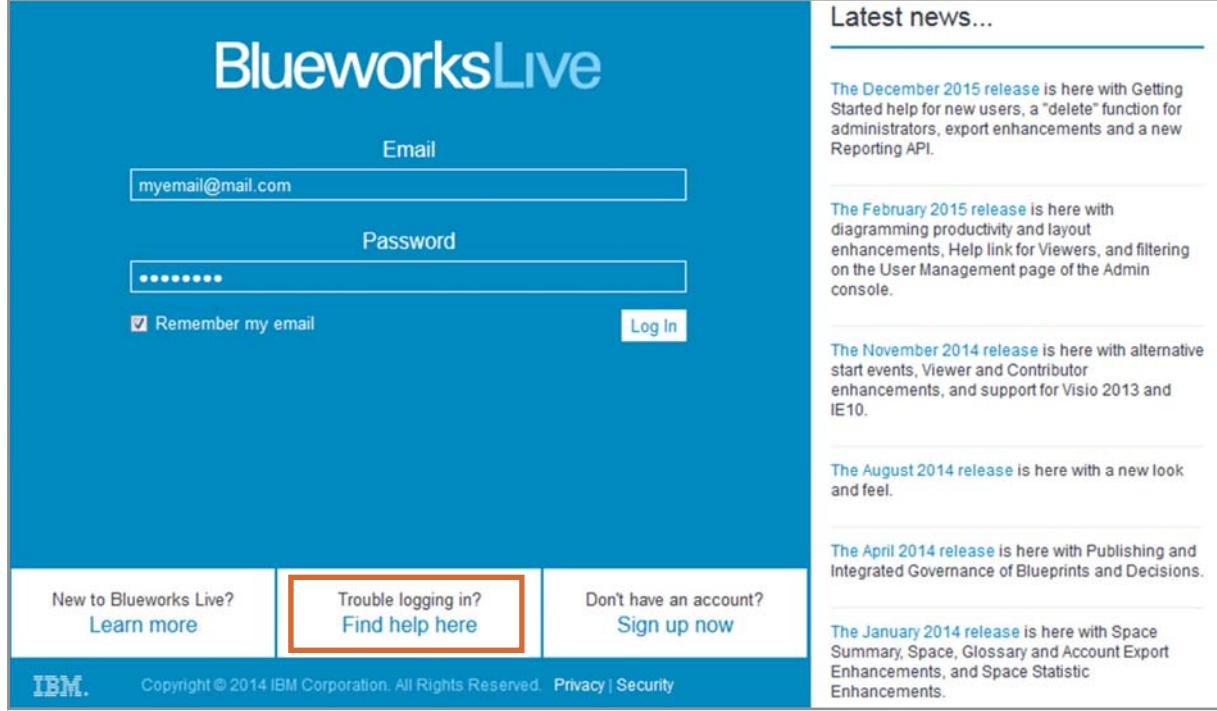
1:47 pm

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Figure 1-16. User types: Community member

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Notes:



The screenshot shows the BlueworksLive login interface. At the top, there's a navigation bar with a left arrow icon, the text "WebSphere Education", and the IBM logo. Below the navigation bar is a blue header with the "BlueworksLive" logo. The main area contains fields for "Email" (containing "myemail@mail.com") and "Password" (containing "*****"). There are checkboxes for "Remember my email" and a "Log In" button. Below the login form are three buttons: "New to Blueworks Live? Learn more", "Trouble logging in? Find help here" (which is highlighted with an orange border), and "Don't have an account? Sign up now". At the bottom, there's an IBM logo, copyright information ("Copyright © 2014 IBM Corporation. All Rights Reserved. Privacy | Security"), and a "Latest news..." sidebar on the right side.

Figure 1-17. Inviting users: Troubleshooting

ZB0302.0

Notes:



Steps to resend an invitation

To resend an email invitation to the account:

1. Go to the login: <https://www.bluemeworkslive.com/login>
2. Click the **Find help here** link under **Trouble logging in?**
3. Type in the email address.
4. Click **Submit**.
5. An email message is sent to the user. Follow the instructions to log on to the account.

This process allows the user to resend the email invitation to gain access to the account

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Figure 1-18. Steps to resend an invitation

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Notes:



What happens if the user settings are wrong?



- An organization changes the role of a user in a IBM Business Process Manager process team at any time
- User license types can be occasionally set erroneously in the account invitation
- A user setting can be reset at any time in Blaworks Live by an account administrator

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Figure 1-19. What happens if the user settings are wrong?

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Notes:

The screenshot shows the 'My User Settings' page from WebSphere Education. At the top, there's a navigation bar with a left arrow icon, the text 'WebSphere Education', and the IBM logo on the right. Below the header, the title 'Resetting user settings' is displayed in blue. The main content area has a teal header bar with the title 'My User Settings' and a close button (X). Below this, there are three tabs: 'Account Settings' (which is selected and highlighted in orange), 'Notifications', and 'Location'. On the left, there's a placeholder profile picture icon with the text 'Change' below it. The 'Full Name' field contains 'User 2'. The 'Email Address' field contains 'user2@mail.com' with a '(Change)' link next to it. Below these fields is a list of four checkboxes, all of which are checked: 'Automatically follow processes, decisions, and policies that I create', 'Automatically follow processes, decisions, and policies that I edit', 'Automatically follow work that I launch', and 'Automatically follow posts that I create'. At the bottom of the page, there are two links: 'Go to the User 2 Training Space' and 'Change password'. On the far right, there's a blue 'Update' button.

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Figure 1-20. Resetting user settings

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Notes:

WebSphere Education

IBM

Resetting user settings, continued

My User Settings

[Account Settings](#) **Notifications** [Location](#)

Weekly Activity - Blueworks Live sends you a **weekly email** with updates about the recent activity within your account.

Daily Update - Blueworks Live sends you a **daily email** listing the changes made to items you follow and details on current task assignments.

New Reply - Blueworks Live sends you an **immediate email** whenever a new reply is added to an item that you have commented on.

New Task - Blueworks Live sends you an **immediate email** whenever you receive a new task assignment.

Update

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Figure 1-21. Resetting user settings, continued

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Notes:



My User Settings

[Account Settings](#) | [Notifications](#) **Location**

Current Time Zone:

(GMT -06:00) Central Time (US & Canada)

Language

English (India)

Update

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Figure 1-22. Resetting user settings, continued

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Notes:

The screenshot shows the BlueworksLive account administration interface. At the top, there's a navigation bar with links for Work, Community, Library, and a search bar. On the right, there are links for User 1, Admin, Help, Logout, and an information icon. Below the navigation is a secondary menu with links for Properties, Account Information, Billing Details, Customization, and Security.

The main content area is titled "User Management" and contains a sub-section titled "User Accounts". A red box highlights this section. It includes a "User Accounts" heading, an "Export" link, and a table with columns for Type, Full Name, Account Admin, Email Address, Last Logged In, and Archive. One row is visible in the table, showing "User 1" as the type, "User 1" as the full name, "Account Admin" as the account admin, "User 1@mail.com" as the email address, "20-Jan-2016" as the last logged in date, and a minus sign icon for archiving.

At the bottom of the page, there's a message about license usage: "You are using 1 of the 1000 editor licenses, 0 of the 1000 contributor licenses, and 0 community licenses." There's also a note: "*Indicates users that do not count against available user licenses." The footer includes links for "Account: IBM-SWG-AIM-Rules59", the "IBM" logo, "Blueworks Live Terms of Use", and "Invite New Users".

Figure 1-23. Account administrator

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Notes:



Topic review

- Account level access is automatically granted to new Blueworks Live subscriptions
- Users can be invited to participate in another account through email
- License types dictate the account permission levels for invited user
- License types: Editor, contributor, and community member
- An account administrator resets user settings in the Admin/User Management section of Blueworks Live
- An account administrator resets the user email address and password in the Admin/User Management section of Blueworks Live
- Users are reset to an administrator status by an account administrator in the Admin/User Management section of Blueworks Live

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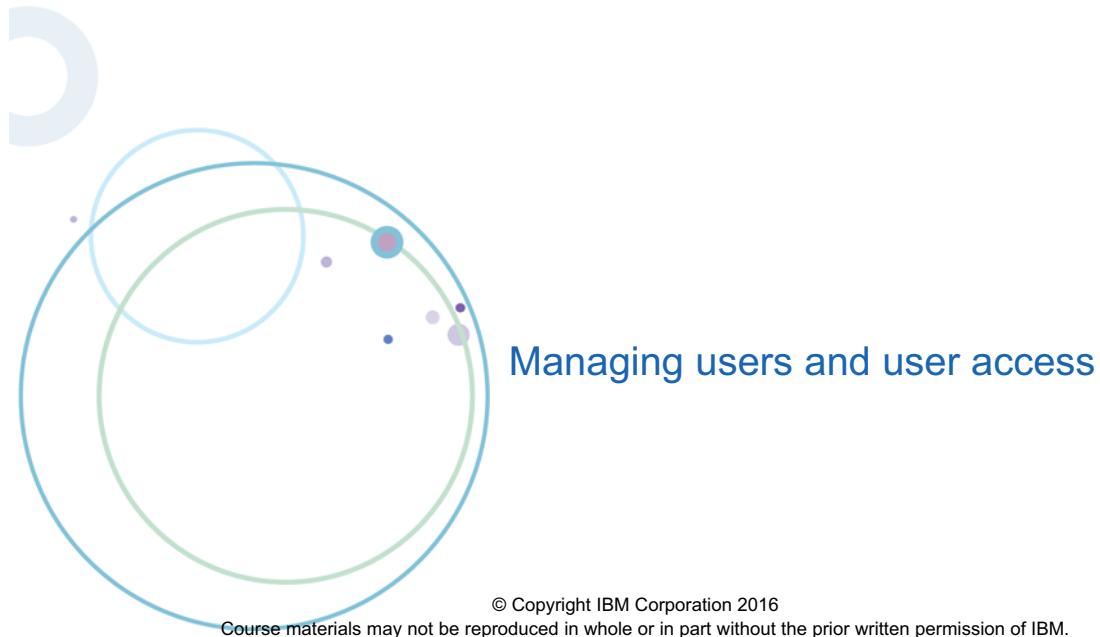
Figure 1-24. Topic review

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Notes:



Space level access



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Figure 1-25. Space level access

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Notes:



Space access overview

- Users are provided task-related permissions for spaces through the license type
- An account access does not provide access to a specific space in the account
- A space manager controls the Space access

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Figure 1-26. Space access overview

ZB0302.0

Notes:

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. Below this is a toolbar with tabs for Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. A prominent 'Create New Space' button is located in the top right corner of the toolbar, highlighted with a red box. The main content area displays a list of existing spaces: 'Blueworks Live Training' (modified 24-Dec-2015), 'Process Examples' (modified 24-Dec-2015), 'Space 01' (modified 08-Jan-2016), 'Space 02' (modified 08-Jan-2016), and 'Training Space' (modified 18-Jan-2016). Each space entry includes a small icon, a name, a modification date, and a star icon. Below the list, there are buttons for 'Invite New Users' and 'IBM Blueworks Live Terms of Use'.

- Click **+ Create New Space** to create a space in the repository
- The organization defines the naming convention for spaces

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Figure 1-27. Creating a space

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Notes:

The screenshot shows the WebSphere Education interface. At the top, there's a blue header bar with the IBM logo on the right. Below it, a main content area has a title "Space details". The interface is a BluetworksLive workspace. On the left, there's a sidebar with "Space Details" and an "ACTIVITY STREAM" section showing a recent change: "You made 17 changes to ★ Claims Payment process" at 1:47 pm. Below the stream are links for "Monday 18 January 2016", "Thursday 14 January 2016", and "Older". The main right-hand panel shows a list of items under "Process Blueprints" and "Policies". Under "Process Blueprints", there are three entries: "Claims Payment" (modified by User 1 on 19-Jan-2016), "Hiring Requisition" (modified by User 1 on 28-Dec-2015), and "Training 01" (modified by User 1 on 18-Jan-2016). Under "Policies", there is one entry: "Claims Payment Policy" (modified by User 1 on 18-Jan-2016). At the bottom of the page, there are links for "IBM", "Bluetworks Live Terms of Use", and "Invite New Users".

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Figure 1-28. Space details

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Notes:

The screenshot shows the BlueworksLive interface for managing space user permissions. At the top, there's a navigation bar with 'WebSphere Education' and the IBM logo. Below it, the title 'Space user permissions' is displayed. The main area shows the 'Training Space' details, including its name, tags ('educarion', 'training'), and a 'Edit Tags' button. There are three tabs: 'Overview', 'Users' (which is selected and highlighted with a red box), and 'Stats'. A note below the tabs explains that the list defines participants and permission levels. On the right, there's a 'Export Space' button. The 'PARTICIPANTS' section contains a table with columns: Type, Name, Blueprint Processes, Automate Processes, Compose Decisions, Author Policies, Manage and Edit Space, and Remove. It lists four entries: 'User 1' (selected), 'All Editors', 'All Contributors', and 'All Community'. Each entry has a small icon next to its name. To the right of the table is a '+ Add' button. At the bottom, there are links for 'IBM Terms of Use' and 'Invite New Users'.

- Add users to the permissions list with the **+ Add** icon on the right side of the screen
- Permission options available are: Blueprint Processes, Automate Processes, Compose Decisions, Author Policies, and Manage and Edit Space

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Figure 1-29. Space user permissions

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Notes:

Space user permissions: Blueprint processes

When the user permission Blueprint process is selected, the user can:

- Create Blueprint processes
- Edit existing Blueprint processes
- Import process from Visio, BPMN 2.0, XPDL 2.1, or process template
- Export processes to Word
- Export processes to Excel
- Export processes to XML formats (XPDL 2.1, BPMN 2.0)
- Export processes to PowerPoint
- Export processes to IBM WebSphere Business Modeler XML v7.0
- Copy processes
- Move processes (change space) option
- Archive processes in the space
- Restore processes in the space
- Tag processes

 Blueprint a Process

 Import

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Figure 1-30. Space user permissions: Blueprint processes

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Notes:



Space user permissions: Automate processes

When the user permission automate process is selected, the user can:

- Create process applications
- Create instances of a process application
- Configure the details of existing process applications
- Import a process application from a process application template
- Copy process applications
- Move process applications (change space) option
- Archive process applications in the space
- Restore process applications in the space
- Tag process applications



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Figure 1-31. Space user permissions: Automate processes

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Notes:

Space user permissions: Manage space

When the user permission manage space is selected, the user can:

- Add, edit, or delete a space description
- Add, edit, or delete a space goal
- Add or remove users in a space
- Change permissions for users in that space
- View ***all*** works for process applications in the space
- Delete posts and comments in the space
- Archive the space
- Export the space
- Restore the space
- Copy the space within the account
- Tag the space
- See the Stats tab



All Spaces >
Training Space ★ ⓘ
educarion training Edit Tags
Overview Users Stats

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Figure 1-32. Space user permissions: Manage space

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Notes:



Overall space management

An account administrator can do the following for all the spaces:

- Create a space
- See the Users page for all spaces
- Archive or restore any space without prior space permission setting
- Add or remove users in any space
- Change permissions for users in any space
- See the Admin page to set more default settings for space management
- Copy a space to another Blueworks Live account
- See the **Work > Work Stats** page for all spaces



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Figure 1-33. Overall space management

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with tabs for Work, Community, and Library. The Library tab is selected, and a search bar says "search spaces". Below the navigation is a toolbar with icons for Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. A dropdown menu shows "Active" and "Spaces (6)". To the right are filters for Name, Date, Tag, and a Filter button. The main area displays several spaces: "Blueworks Live Training" (modified 24-Dec-2015), "Process Examples" (modified 24-Dec-2015), "Space 01" (modified 08-Jan-2016), and "Training Space" (modified 18-Jan-2016). "Space 01" is expanded, showing options like Export Space, Move Space, Copy Space, and Archive, with "Archive" also highlighted by a red box.

1. Go to the **Library > Spaces** page
2. Click the chevron next to the space to archive
3. Select **Archive**

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Figure 1-34. Archive a space

ZB0302.0

Notes:

The screenshot shows a web-based application interface for 'WebSphere Education'. At the top left is a logo with a blue arrow pointing right and the text 'WebSphere Education'. At the top right is the 'IBM' logo. Below the header, the main title 'Copy a space' is displayed in blue. A central modal window titled 'Copy a Space' contains the following fields:

- 'Space Name' field containing 'Copy of Process Examples'.
- 'Location' dropdown menu set to 'Another Blueworks Live account'.
- A section for entering credentials, featuring a lock icon and fields for 'Email Address' and 'Password'.
- A checkbox with the label 'This space will automatically be copied to the top of the library.'
- A blue 'Connect & Copy' button at the bottom right of the modal.

The footer of the page includes a copyright notice: '© Copyright IBM Corporation 2016'.

Figure 1-35. Copy a space

ZB0302.0

Notes:

Topic review

- Users with the account administration permissions can create spaces
- Account administrators can view all functions in a space
- Space user permissions are tied to license type functions
- Space user permissions can be set to the following tasks: Blueprint processes, automate processes, and manage space
- Blueprint processes permissions are restricted to editors, space managers, and account administrators
- Contributors can view shared Blueprint processes
- Automate processes permissions include all license types minus the community member
- Any license type minus the community member can be designated as a space manager
- A space manager or account administrator handles the archive and copies a process

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Figure 1-36. Topic review

ZB0302.0

Notes:



Exercise 1



Creating a space and managing users

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10.1

Figure 1-37. Exercise 1:Creating a space and managing users

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Notes:



Exercise objectives

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

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

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Figure 1-38. Exercise objectives

ZB0302.0

Notes:



Unit summary

Having completed this unit, you should be able to:

- Invite users to a specific Blueworks Live account based on their designated roles
- Grant users specific task-based permissions for a space in Blueworks Live

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Figure 1-39. Unit summary

ZB0302.0

Notes:

Unit 2. Account management

What this unit is about

This unit reviews the methods that are used to manage accounts in Blueworks Live. Account management provides Blueworks Live users with the ability to manage files, customize an account, and modify the glossary.

What you should be able to do

After completing this unit, you should be able to:

- Manage files in a Blueworks Live account
- Modify the glossary in Blueworks Live
- Customize an account in Blueworks Live

How you will check your progress

- Exercise 2
- Exercise 3
- Exercise 4



Unit objectives

After completing this unit, you should be able to:

- Manage files in a Blueworks Live account
- Modify the glossary in Blueworks Live
- Customize an account in Blueworks Live

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Figure 2-1. Unit objectives

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Notes:



Topics

The topics for this unit are:

- File management
- Glossary management
- Managing properties
- Account customization
- Security
- Account Information and Billing Details

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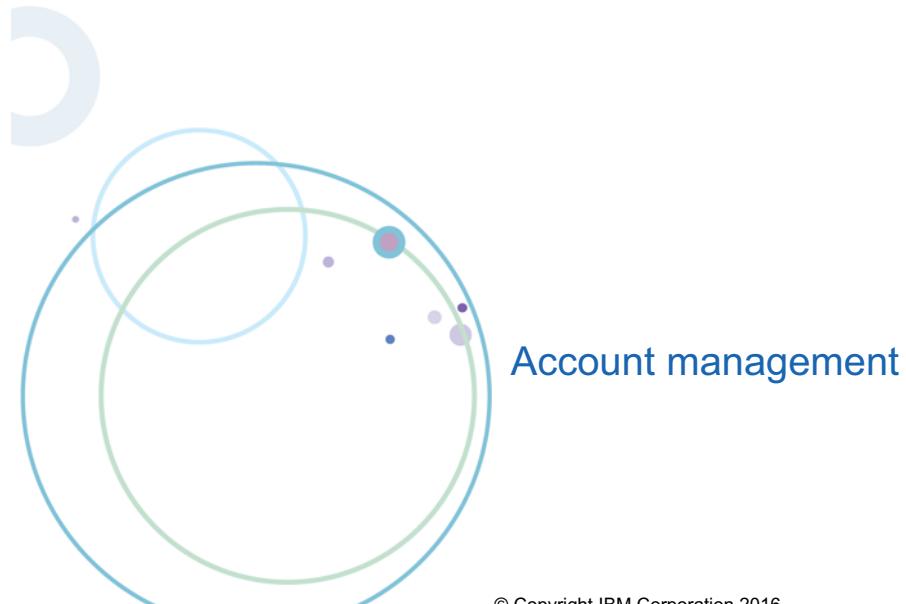
Figure 2-2. Topics

ZB0302.0

Notes:



File management



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10.1

Figure 2-3. File management

ZB0302.0

Notes:



Overview

User Management	<u>File Management</u>	Properties	Account Information	Billing Details	Customization	Security
File Attachments Your account is currently using 16.4 mb of the 2048 mb space available.						
Name ▲		File Size	Type	Location	Date Uploaded	Uploaded By
AbilityTest.pdf		589 kb		sample blueprint	18-Jan-2016	User 1
Abstract-Oil-Paintings.jpg		214 kb		Training 01	18-Jan-2016	User 1
Architecture.pptx		215 kb		Training 01	18-Jan-2016	User 1
Autumn Oil Paintings.jpg		388 kb		Training 01	18-Jan-2016	User 1
CAMSS.PDF		83 kb		Training 01	18-Jan-2016	User 1
Canvas-oil-painting5743.jpg		265 kb			18-Jan-2016	User 1
ExerciseBooks.zip		5.8 mb		Training 01	18-Jan-2016	User 1
GTSE.pdf		2.7 mb			18-Jan-2016	User 1
Help IBMers Enroll.ppt		1.5 mb			18-Jan-2016	User 1
IBM Blueworks Live Admin User Manual.docx		4.7 mb			18-Jan-2016	User 1
Training Document.doc		8 kb		Training 01	18-Jan-2016	User 1
Your account is currently using 16.4 mb of the 2048 mb space available.						

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Figure 2-4. Overview

ZB0302.0

Notes:




Manage files

User Management File Management Properties Account Information Billing Details Customization Security

File Attachments
Your account is currently using 16.4 mb of the 2048 mb space available.

File	Name	File Size	Type	Location	Date Uploaded	Uploaded By	Actions
	AbilityTest.pdf	589 kb		sample blueprint	18-Jan-2016	User 1	
	Abstract-Oil-Paintings.jpg	214 kb		Training 01	18-Jan-2016	User 1	
	Architecture.ppt	215 kb		Training 01	18-Jan-2016	User 1	
	Autumn Oil Paintings.jpg	388 kb		Training 01	18-Jan-2016	User 1	
	CAMSS.PDF	83 kb		Training 01	18-Jan-2016	User 1	
	Canvas-oil-painting5743.jpg	265 kb			18-Jan-2016	User 1	
	ExerciseBooks.zip	5.8 mb		Training 01	18-Jan-2016	User 1	
	GTSE.pdf	2.7 mb			18-Jan-2016	User 1	
	Help IBMers Enroll.ppt	1.5 mb			18-Jan-2016	User 1	
	IBM Blaworks Live Admin User Manual.docx	4.7 mb			18-Jan-2016	User 1	
	Training Document.doc	8 kb		Training 01	18-Jan-2016	User 1	

Your account is currently using 16.4 mb of the 2048 mb space available.

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Figure 2-5. Manage files

ZB0302.0

Notes:

Remove versus delete files

Removed (detached) files:

- The file attachment still exists in the account
- The file storage space is still in use
- The icon or indicator shows that the file is now “orphaned”

When a file is deleted:

- The file attachment is not accessible in the account anymore
- The file storage space that is used is added back to the total storage space for the account
- The deleted file disappears from the table
- The file size that is deleted decreases the total storage that is used

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Figure 2-6. Remove versus delete files

ZB0302.0

Notes:



Sorting with color views

- Gray in the View color bar shows all the files attachments
- Green in the View color bar shows only active attached files
- Blue in the View color bar shows only orphaned files
- Red in the View color bar shows files that are archived in a process or space

A screenshot of a file management interface. At the top left is a 'View' button with three colored squares (green, blue, red) and the word 'Free Space' to its right. Below this is a table listing three files: AbilityTest.pdf (red), Abstract-Oil-Paintings.jpg (green), and Architecture.pptx (green).

File	Name	File Size	Type
	AbilityTest.pdf	589 kb	
	Abstract-Oil-Paintings.jpg	214 kb	
	Architecture.pptx	215 kb	

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Figure 2-7. Sorting with color views

ZB0302.0

Notes:



Topic review

- Users with permissions can add and remove (detach) file attachments from a Blueprint process or process application
- Removing a file attachment does not remove it from the account
- Only an administrator can delete a file from the account in the File Management page of the Admin section
- Account administrators can choose to sort file views through the categories that are provided in either an ascending or a descending list
- Views in the File Management table can also be shown through the View color bars

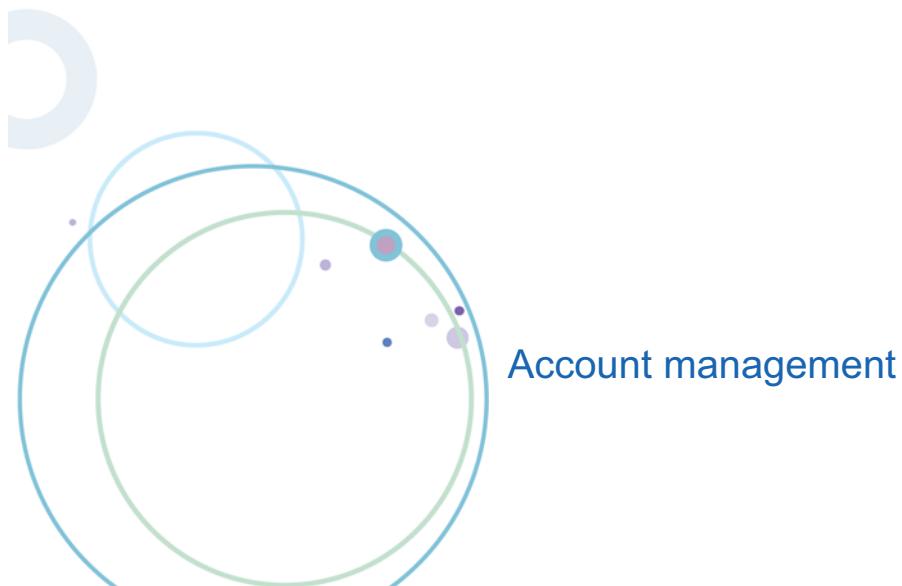
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Figure 2-8. Topic review

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Notes:

Glossary management



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10.1

Figure 2-9. Glossary management

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Notes:

The screenshot shows the BlueworksLive application interface. At the top, there is a navigation bar with tabs: Work, Community, and Library. Below this is a secondary navigation bar with tabs: Spaces, Processes, Decisions, Policies, User Groups, **Glossary**, Blogs, and Templates. The 'Glossary' tab is highlighted with a red box. The main content area is titled 'Glossary' and contains a list of categories: Participants | Business Owners | Experts, External Participants, Systems, Suppliers | Customers, Inputs | Outputs, Problems, Key Performance Indicators, Goals, and Tags. The 'Values' tab is also visible in the secondary navigation bar.

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Figure 2-10. Overview

ZB0302.0

Notes:

The screenshot shows the BlueworksLive platform interface. At the top, there's a navigation bar with links for Work, Community, Library, and Glossary. The Glossary link is underlined, indicating it's the active page. Below the navigation is a search bar and a menu with options like User 1, Admin, Help, Logout, and an information icon. The main content area is titled 'Glossary' and shows a list of categories with counts: Participants (22), External Participants (0), Systems (6), Suppliers | Customers (4), Inputs | Outputs (78), Problems (13), Key Performance Indicators (0), Goals (10), and Tags (4). A red box highlights the 'Participants' category.

Category	Count
Participants	22
External Participants	0
Systems	6
Suppliers Customers	4
Inputs Outputs	78
Problems	13
Key Performance Indicators	0
Goals	10
Tags	4

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Figure 2-11. Glossary management

ZB0302.0

Notes:

Glossary user permissions

This list defines the editors and contributors who can participate in the Glossary. Glossary participants can view all the values used in artifacts they have access to and participants with an editor license can edit the description on non-preferred values. Participants who have permission to manage and edit the Glossary can rename and merge values. They can also mark values as preferred, edit their descriptions, and manage the list of participants.

PARTICIPANTS			
Type	Name	Manage and Edit Glossary	Remove
	All Editors	<input type="checkbox"/>	
	All Contributors	<input type="checkbox"/>	
	All Admins	<input checked="" type="checkbox"/>	

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Figure 2-12. Glossary user permissions

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a header with the IBM logo and a search bar. Below the header, the main navigation bar includes links for Work, Community, Library, and Glossary. The 'Glossary' link is highlighted with a red box. Under the 'Glossary' heading, there are tabs for 'Values' (which is also highlighted with a red box) and 'Users'. On the right side of this section, there are icons for a grid, a star, and a filter, along with a 'Filter' button. Below this, there's a section titled 'Participants | Business Owners | Experts' with a count of '22'. The main content area displays a table with columns for 'Preferred', 'Value', and 'Description'. The first row has a checked checkbox in the 'Preferred' column, the value 'Accounting', and a small icon. The description column contains the text 'add description' and a 'Merge' button with a checkbox. The other rows in the table list various terms like 'Audit control', 'Background Check', etc., each with an unchecked checkbox in the 'Preferred' column.

Preferred	Value	Description
<input checked="" type="checkbox"/>	Accounting	<i>add description</i> Merge <input type="checkbox"/>
<input type="checkbox"/>	Audit control	
<input type="checkbox"/>	Background Check	
<input type="checkbox"/>	Vendor	
<input type="checkbox"/>	Beneficiary	
<input type="checkbox"/>	Candidate	
<input type="checkbox"/>	Claims Analyst	
<input type="checkbox"/>	Facilities Team	
<input type="checkbox"/>	Finance	
<input type="checkbox"/>	General Manager	

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Figure 2-13. Property values

ZB0302.0

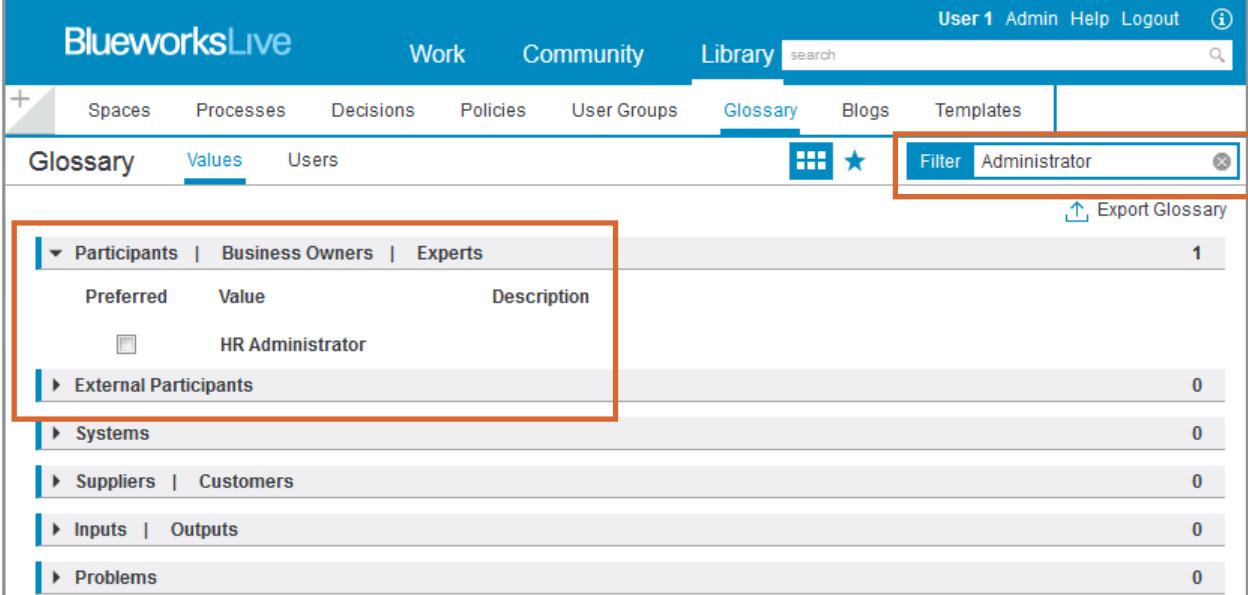
Notes:



WebSphere Education

IBM

Filtering



The screenshot shows the BlueworksLive interface. At the top, there are navigation tabs: Work, Community, Library, and Glossary. The Library tab is active. Below the tabs, there's a search bar and a navigation menu with links to Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. The Glossary link is also active. On the right side of the header, there are user options: User 1 Admin Help Logout. A red box highlights the 'Filter' button and the input field where 'Administrator' is typed.

Glossary Values Users

Filter Administrator

Export Glossary

Participants	Business Owners	Experts	1
Preferred	Value	Description	
<input type="checkbox"/> HR Administrator			
External Participants			0
Systems			0
Suppliers Customers			0
Inputs Outputs			0
Problems			0

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Figure 2-14. Filtering

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there is a navigation bar with links for Work, Community, Library, and a search bar. The Library tab is selected. Below the navigation bar, there is a secondary menu with links for Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. The Glossary link is also selected. Under the Glossary link, there are three tabs: Values (which is selected), Users, and Filter. On the right side of the screen, there is a button labeled "Export Glossary". Below these tabs, there is a table with columns for Preferred, Value, and Description. The first row in the table has a checked checkbox in the Preferred column, a value of "Accounting", and a description of "add description". There is also a "Merge" button next to this row. The other rows in the table have empty checkboxes in the Preferred column and descriptions like "Audit control", "Background Check Vendor", etc. In the bottom right corner of the table, there is a small "22" indicating the number of items.

Preferred	Value	Description
<input checked="" type="checkbox"/>	Accounting	add description Merge
<input type="checkbox"/>	Audit control	
<input type="checkbox"/>	Background Check Vendor	
<input type="checkbox"/>	Beneficiary	
<input type="checkbox"/>	Candidate	
<input type="checkbox"/>	Claims Analyst	
<input type="checkbox"/>	Facilities Team	
<input type="checkbox"/>	Finance	
<input type="checkbox"/>	General Manager	

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Figure 2-15. Where used

ZB0302.0

Notes:

User 1 Admin Help Logout (i)

Work Community Library search

+ Spaces Processes Decisions Policies User Groups Glossary Blogs Templates

Glossary Values Users Filter Export Glossary

Participants | Business Owners | Experts 22

Preferred	Value	Description	Merge
<input checked="" type="checkbox"/>	Accounting ★	add description	<input type="checkbox"/>

Where Used: Accounting

1 Space 1 Process 0 Decisions 2 Occurrences

Claims Payment Training Space
Last modified on 29-Dec-2015

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Figure 2-16. Where used

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'WebSphere Education' and the 'IBM' logo. Below the navigation bar, the title 'Merge' is displayed. The main content area has a header 'Glossary' with tabs for 'Values' (which is selected) and 'Users'. There are also buttons for 'Export Glossary' and a search bar. The main table has columns for 'Preferred', 'Value', and 'Description'. Three rows are selected and highlighted with an orange box. The first row contains 'Accounting' with a 'Merge' button checked. The second row contains 'Audit control' with a 'Merge' button checked. The third row contains 'Background Check Vendor' with a 'Merge' button checked. Below this table, there's a list of other values: Beneficiary, Candidate, Claims Analyst, Facilities Team, Finance, General Manager, hg, and Hiring Manager. A modal dialog box is overlaid on the page, containing the text 'Select another value, or' at the top, followed by a blue button labeled 'Merge 3 Values' and a link labeled 'Cancel'.

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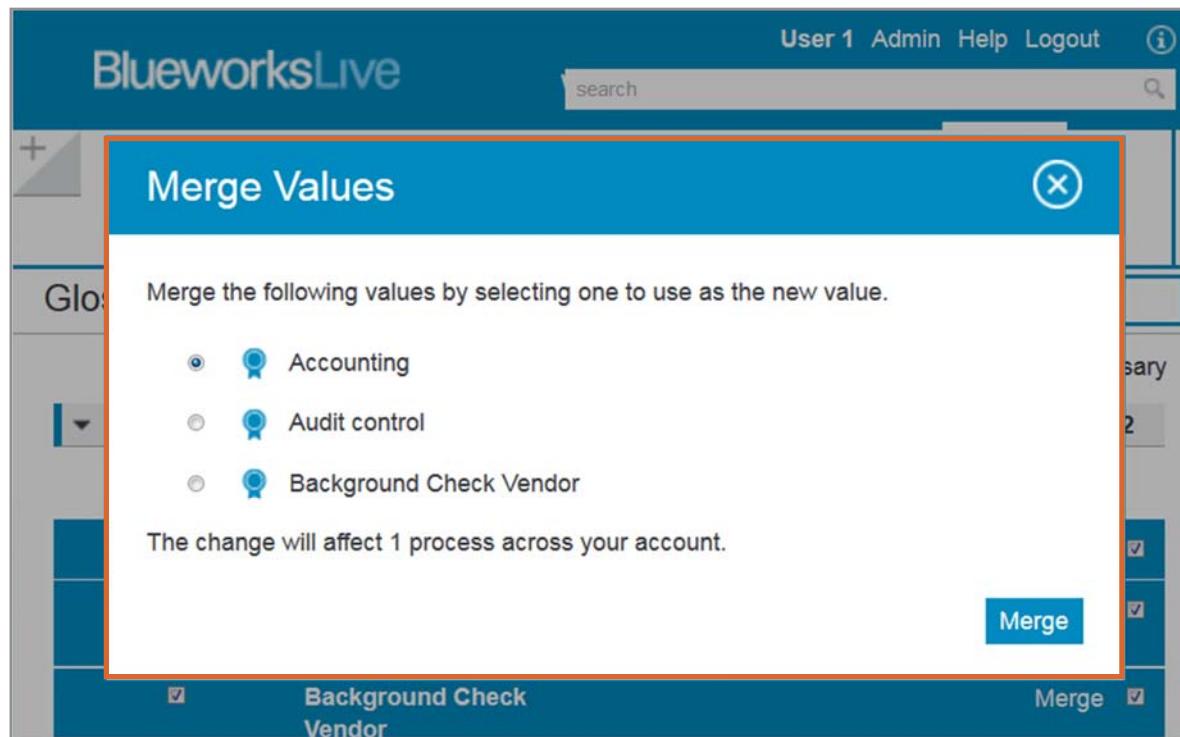
Figure 2-17. Merge

ZB0302.0

Notes:



Merge values dialog box



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Figure 2-18. Merge values dialog

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Notes:



Other merge considerations

- Administrators can merge considerations and conclusions with each other and with inputs and outputs
- Merging considerations and conclusions updates them in decision and exception tables, and in the Inputs and Outputs categories
- If a property is renamed to the exact same name as an existing property, the Merge Values dialog box is shown and the same merge process is followed as before

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Figure 2-19. Other merge considerations

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Notes:



Topic review

- The Glossary page is in the Library section, but can be accessed through the Admin section as well
- Glossary properties are Blueprint process category names or titles that are entered in process activities
- Users with permissions to edit and merge glossary properties are designated by account administrators in the Users section of the Glossary page
- Users with editing permission can select a property as a preferred item
- Users with editing permission can change a property value
- Users with editing permission can add a description for a property
- Users with editing permission can merge properties in each category
- If a property is renamed to an existing value, the user with editing permission is prompted to merge the two items

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Figure 2-20. Topic review

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Notes:



Managing properties



Figure 2-21. Managing properties

ZB0302.0

Notes:

Properties

Select the properties to be displayed to users on the Details tab. You can also add your own properties.

Visible	Property	Tooltip	Type
<input checked="" type="checkbox"/>	Participants	A role or system responsible for completing this activity. Only one participant can be assigned to an activity in Blueworks Live.	Text
<input checked="" type="checkbox"/>	Business Owners	The roles or people accountable for this activity.	Text
<input checked="" type="checkbox"/>	Experts	The roles or people consulted about this activity.	Text
<input checked="" type="checkbox"/>	Systems	Technologies or devices that are utilized by or required to complete this activity.	Text
<input checked="" type="checkbox"/>	Cycle Time	The total time spent on this activity, the sum of work and wait time.	Number
<input checked="" type="checkbox"/>	Cost	The price or value attributed to performing this activity.	Number
<input checked="" type="checkbox"/>	Suppliers	An individual, group or company that supplies inputs to this activity.	Text
<input checked="" type="checkbox"/>	Customers	An individual, group or company that uses the outputs produced by this activity.	Text

IBM. Blueworks Live Terms of Use Invite New Users

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Figure 2-22. Overview

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Notes:

Standard properties

User 1 Admin Help Logout

BlueworksLive Work Community search

User Management File Management Properties Account Information Billing Details Customization Security

Properties

Select the properties to be displayed to users on the Details tab. You can also add your own properties.

Visible	Property	Tooltip	Type
<input checked="" type="checkbox"/>	Participants	⑦ A role or system responsible for completing this activity. Only one participant can be assigned to an activity in Blueworks Live.	Text
<input checked="" type="checkbox"/>	Business Owners	⑦ The roles or people accountable for this activity.	Text
<input checked="" type="checkbox"/>	Experts	⑦ The roles or people consulted about this activity.	Text
<input checked="" type="checkbox"/>	Systems	⑦ Technologies or devices that are utilized by or required to complete this activity.	Text
<input checked="" type="checkbox"/>	Cycle Time	⑦ The total time spent on this activity, the sum of work and wait time.	Number

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Figure 2-23. Standard properties

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Notes:

Custom properties

Custom Process Properties

Color	What colors should be chosen	Type
<input type="text"/>	Text	
add tooltip		
Click to add a text property		
Click to add a text property		
Click to add a text property		
Click to add a number property		
Click to add a number property		
Click to add a number property		
Click to add a number property		
Click to add a number property		

Decision Properties

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Figure 2-24. Custom properties

ZB0302.0

Notes:



Topic review

- Standard IBM Business Process Manager data that is captured for a Blueprint process activity is provided in the standard properties section of the Properties page
- Administrators can choose to disable standard properties or enable them again depending on organizational needs
- Standard property labels and tooltip information cannot be altered
- Ten custom property values, five texts, and five numbers, can be added in the custom properties section of the Properties page
- Administrators can provide unique labels for each custom property, with a limit of 20 characters
- Tooltip information can also be provided for a custom property by an administrator

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Figure 2-25. Topic review

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Notes:

Account customization



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10.1

Figure 2-26. Account customization

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Notes:

The screenshot shows the BlueworksLive customization interface. At the top, there's a navigation bar with links for User One, Admin, Help, and Logout. Below the navigation bar, there are tabs for Work, Community, Library, and Customization, with 'Customization' being the active tab. A red box highlights the 'Customization' tab. To the right of the tabs is a search bar and a magnifying glass icon. Below the tabs, there are several buttons: User Management, File Management, Properties, Upgrade Account, Customization (which is highlighted with a red box), and Security. To the right of these buttons is a 'Lock and Prevent Changes' button with a circular arrow icon.

Customization

Preferences

Only editors and admins can invite new users

Enable chat messaging (Users can send instant messages using Blueworks Live's built-in chat)

Display the Work page (Users can create process apps and complete work)

Display the Public BPM Stream (Users can see and search the contents of the Public BPM Stream)

Allow posting to activity streams (Users can post to the private account and space streams)

Library

Admins have full permissions in all spaces, all user groups and the glossary (Admins cannot be removed)

Only editors and contributors can create, move, and archive spaces

Also allow space managers to create, move and archive sub-spaces

IBM Blueworks Live Terms of Use

Invite New Users

- Customization in Blueworks Live involves preferences and branding

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Figure 2-27. Overview

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface with the following details:

- Header:** WebSphere Education, IBM logo.
- Top Navigation:** User One, Admin, Help, Logout, search bar.
- Main Navigation:** Work, User Management, File Management, Properties, Upgrade Account, Customization (highlighted), Security.
- Section:** Customization, Lock and Prevent Changes.
- Form:** Preferences section with a red border.
 - Text: Only editors and admins can invite new users.
 - List:
 - Enable chat messaging (Users can send instant messages using Blueworks Live's built-in chat)
 - Display the Work page (Users can create process apps and complete work)
 - Display the Public BPM Stream (Users can see and search the contents of the Public BPM Stream)
 - Allow posting to activity streams (Users can post to the private account and space streams)
- Footer:** IBM, Blueworks Live Terms of Use, Invite New Users, © Copyright IBM Corporation 2016.

Figure 2-28. Preferences

ZB0302.0

Notes:

The screenshot shows the 'Branding' section of the BlueworksLive administration interface. At the top, there's a navigation bar with 'WebSphere Education' and the IBM logo. Below it, the main title is 'Branding: Custom logo and color scheme'. The 'Branding' tab is selected. A red box highlights the 'Custom logo & color scheme' checkbox, which is checked. Below it, there's a preview area showing a blue header bar with the 'BlueworksLive' logo. A color palette is visible above the preview. Below the preview, there's a note about file upload requirements: 'Upload a .jpg, .png or .gif with a transparent background. 45px max height, 180px max width.' There are two buttons: 'Upload Logo | Text as Logo' and 'Update'. Further down, there are two unchecked checkboxes: 'Custom email notifications' and 'Custom logo on Word export'. At the bottom, there's a footer with the IBM logo, 'Blueworks Live Terms of Use', and 'Invite New Users'.

Figure 2-29. Branding: Custom logo and color scheme

ZB0302.0

Notes:

The screenshot shows the 'Branding' section of the WebSphere Education interface. At the top, there's a navigation bar with 'Work', 'Community', and 'Library' tabs. On the right, there are links for 'User One Admin Help Logout' and a search bar. Below the navigation, the 'Branding' section is selected. Two options are listed: 'Custom logo & color scheme' and 'Custom email notifications'. The 'Custom email notifications' option is checked and highlighted with an orange border. Under this option, there's a field for 'Email subject name' containing 'My Blueworks Live'. A note below it says: 'This will appear as the application name replacing Blueworks Live in the email subject and body.' There's also a checked checkbox for 'Include Account Name'. A preview window titled 'My Blueworks Live IBM603 Weekly Activity' shows a sample email message with the subject 'My Blueworks Live Weekly Activity' and a body text: 'Here's what happened in your My Blueworks Live IBM603 account last week.' Below the preview, there's a logo upload section with a placeholder 'Upload Logo' and a text input field for 'Organization Name' with the value 'My Blueworks Live'. A rich text editor toolbar is visible next to the organization name input.

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Figure 2-30. Branding: Custom notifications

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Notes:

The screenshot shows the 'Branding' section of the BlueworksLive application. At the top, there's a navigation bar with links for 'Work', 'Community', and 'Library'. A search bar is also present. On the right side of the header, there are links for 'User One', 'Admin', 'Help', and 'Logout'. Below the header, the main content area is titled 'Branding'. It contains three checkboxes:

- Custom logo & color scheme (Applied to the header and footer of your account)
- Custom email notifications (For all user account updates and notifications)
- Custom logo on Word export (Applied to the Word export for the documentation view of a Process Blueprint)

A large text input field contains the placeholder text 'My Blueworks Live'. Below it, instructions state: 'Upload a .jpg, .png or .gif with a transparent background. 45px max height, 180px max width.' There are three buttons: 'Upload Logo', 'Text as Logo', and 'Remove'. To the right of the text input, there are font style and size dropdown menus set to 'Arial Black' and '14pt', along with bold (B), italic (I), and underline (A) buttons. An 'Update' button is located at the bottom left of the text input area. At the very bottom of the page, there's a footer with links for 'IBM', 'Blueworks Live Terms of Use', and 'Invite New Users', along with a copyright notice: '© Copyright IBM Corporation 2016'.

Figure 2-31. Branding: Custom logo on Word export

ZB0302.0

Notes:

The screenshot shows the BlueworksLive customization interface. At the top, there's a navigation bar with links for User Management, File Management, Properties, Upgrade Account, Customization (which is currently selected), and Security. Below this is a main content area titled 'Customization'. On the right side of the customization section, there's a button labeled 'Lock and Prevent Changes' with a blue circular icon containing a white 'X'. This button is highlighted with a thick orange rectangular border. Underneath the customization section, there's a 'Preferences' section containing several configuration options. One of these options is 'Only editors and admins can invite new users', which has a dropdown menu currently set to 'editors and admins'. Below this, there are five checkboxes, all of which are checked, corresponding to the following settings: 'Enable chat messaging' (Users can send instant messages using Blueworks Live's built-in chat), 'Display the Work page' (Users can create process apps and complete work), 'Display the Public BPM Stream' (Users can see and search the contents of the Public BPM Stream), and 'Allow posting to activity streams' (Users can post to the private account and space streams). At the bottom of the page, there's a footer bar with the IBM logo, a link to 'Blueworks Live Terms of Use', and a 'Invite New Users' button. The footer also includes a copyright notice: '© Copyright IBM Corporation 2016'.

Figure 2-32. Lock and prevent changes

ZB0302.0

Notes:



Topic review

- Custom preference settings for the account are set in the Preferences section of the Customization page of the Admin section
- Custom branding for the account are set in the Branding section of the Customization page of the Admin section
- Unique logos and color schemes can be set for the Blueworks Live user interface banner to match organizational needs
- Email notifications are branded in the Branding section of the Customization page of the Admin section
- Word exports are branded in the Branding section of the Customization page of the Admin section

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Figure 2-33. Topic review

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Notes:

Security



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10.1

Figure 2-34. Security

ZB0302.0

Notes:

BlueworksLive

User One Admin Help Logout search

Work Community Library

User Management File Management Properties Upgrade Account Customization **Security**

Account Security

Security Restrictions

Unrestricted access (Licensed users can access Blueworks Live from a computer or device on any network)

Set IP address range(s) for your network to allow Blueworks Live to be accessed from your office or through VPN. To set a specific address, specify the same IP as both the start and end address in a range. Your current IP address is 122.162.209.17.

Start Address: to End Address: + -

Unlimited email domains allowed (New user invitations can be sent to users on any email domain)

Limit new account invitations to users with email domains in the following list. Enter multiple domains separated by spaces.

e.g. mycompany.com *.partner.com

IBM Blueworks Live Terms of Use Invite New Users

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Figure 2-35. Overview

ZB0302.0

Notes:

The screenshot shows the 'WebSphere Education' interface with the 'BlueworksLive' logo at the top left. At the top right, there are links for 'User One Admin Help Logout' and a search bar. Below the header, the page title 'Security restrictions' is displayed. The main content area is titled 'Account Security' and contains a 'Security Restrictions' section. This section includes two configuration options:

- Unrestricted access:** A note states that licensed users can access Blueworks Live from any network. It includes a form to set an IP address range, with fields for 'Start Address' and 'to End Address', and buttons for '+', 'Update', and '-'.
- Unlimited email domains allowed:** A note states that new user invitations can be sent to users on any email domain. It includes a form to enter multiple email domains separated by spaces, with an example 'e.g. mycompany.com *.partner.com' and a 'Update' button.

At the bottom of the page, there are links for 'IBM Blueworks Live Terms of Use' and 'Invite New Users'. A copyright notice '© Copyright IBM Corporation 2016' is also present.

Figure 2-36. Security restrictions

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface. At the top, there's a navigation bar with 'WebSphere Education' on the left and the IBM logo on the right. Below the navigation bar, the title 'Authentication' is displayed. The main content area has a header 'Authentication' and a sub-header 'Blueworks Live Authentication'. A note says 'Drag the slider to set the appropriate security level for your account. Changes are applied immediately.' Below this, a slider is set to 'Medium'. To the left of the slider is a vertical scroll bar. A bulleted list details security settings: 'Passwords must contain at least 8 characters', 'Current password is required to change password', and 'After 4 failed login attempts, user is locked out for 15 minutes'. At the bottom of the page, it says 'Account: IBM603', 'IBM. Blueworks Live Terms of Use', and 'Invite New Users'. The footer contains the copyright notice '© Copyright IBM Corporation 2016'.

Figure 2-37. Authentication

ZB0302.0

Notes:

Topic review

- The Security page has two sections: Security Restriction and Authentication
- In the Security Restriction section, the administrator can set a range of IP addresses or one single IP address for the network access to the Blueworks Live account
- Unrestricted access to the Blueworks Live account can be set by selecting the check box next to the option
- In the Security Restriction section, the administrator can set a list of email domains to restrict login to dedicated email account types
- Unlimited email domains can be allowed by selecting the check box next to the option
- Authentication for account logins can be set to two levels: Medium and High

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Figure 2-38. Topic review

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Notes:

Account Information and Billing Details



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Figure 2-39. Account Information and Billing Details

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Notes:



Account Information

BlueworksLive

User Management File Management Properties **Account Information** Billing Details Customization Security

Your Account Type: Professional Edition

Your current Blueworks Live features	
Editors	1000
Contributors	1000
Processes	Unlimited
Launch Work	✓
Assign Tasks	✓
Visio Import	✓
Publishing	✓
Templates	✓
PowerPoint Export	✓
Printing Maps & Diagrams	✓
Collaboration	✓
File Attachments	✓
Email Notifications	✓
IBM Business Process Manager Integration	✓

Upgrade Your Account

Upgrade selections:

Purchase Additional User Licenses

Professional Edition accounts can purchase additional user licenses - allowing you to invite more users to join your account. New license purchases will be charged immediately for a prorated amount.

Contact Blueworks Live Sales to request downgrades of existing user licenses.

Blueworks Live API

The Blueworks Live API allows third-party applications to communicate with the service. For more information on developing with the API, see the [Blueworks Live API Documentation](#) page.

Enable the Blueworks Live API

Invite New Users

IBM. [Blueworks Live Terms of Use](#)

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Figure 2-40. Account Information

ZB0302.0

Notes:



Billing Details

- Billing Details shows Credit Card information for accounts that are using credit card billings.
- You can change your billing information, purchase more seats, and see when you are billed again.

The screenshot shows the BlueworksLive interface with the 'Billing Details' tab highlighted by a red box. The page displays sections for 'Next Billing' (indicating no billing information) and 'Billing Information' (fields for credit card number, billing cycle, address, city, state/province, zip/postal code, country/region, phone number, and VAT/GST identification number). A note says payments will be auto-drafted from the account based on the selected billing cycle. At the bottom, there are links for 'IBM Blueworks Live Terms of Use' and 'Invite New Users'.

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Figure 2-41. Billing Details

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Notes:

Exercise 2



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Figure 2-42. Exercise 2Customize an account

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Notes:



Exercise objectives

After completing the exercise, a student will be able to:

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

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Figure 2-43. Exercise objectives

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Notes:

Exercise 3



Managing the glossary

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Figure 2-44. Exercise 3 Manage the glossary

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Notes:



Exercise objectives

After completing the exercise, a student will be able to:

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

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Figure 2-45. Exercise objectives

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Notes:

Exercise 4



Deleting an attachment in a project

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Figure 2-46. Exercise 4Delete an attachment

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Notes:



Exercise objectives

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

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Figure 2-47. Exercise objectives

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Notes:



Unit summary

Having completed this unit, you should be able to:

- Manage files in a Blueworks Live account
- Modify the glossary in Blueworks Live
- Customize an account in Blueworks Live

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Figure 2-48. Unit summary

ZB0302.0

Notes:

Unit 3. Blueworks Live enhancements

What this unit is about

This unit reviews functional enhancements in Blueworks Live. Blueworks Live allows users to add policies in process maps and diagrams, discover where certain tags are used in a process map or diagram, or conduct playbacks for initial discovery maps and diagrams.

What you should be able to do

After completing this unit, you should be able to:

- Establish and enable policies for process models in Blueworks Live
- Enable the “where used” functions in Blueworks Live
- Conduct playbacks in Blueworks Live
- Implement built-in governance for process and decision models

How you will check your progress

- Exercise 5
- Exercise 6



Unit objectives

After completing this unit, you should be able to:

- Establish and enable policies for process models in Blueworks Live
- Enable the “where used” functions in Blueworks Live
- Conduct playbacks in Blueworks Live
- Implement built-in governance for process and decision models

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Figure 3-1. Unit objectives

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Notes:



Topics

The topics for this unit are:

- Policies
- Where Used
- Playback
- Governance

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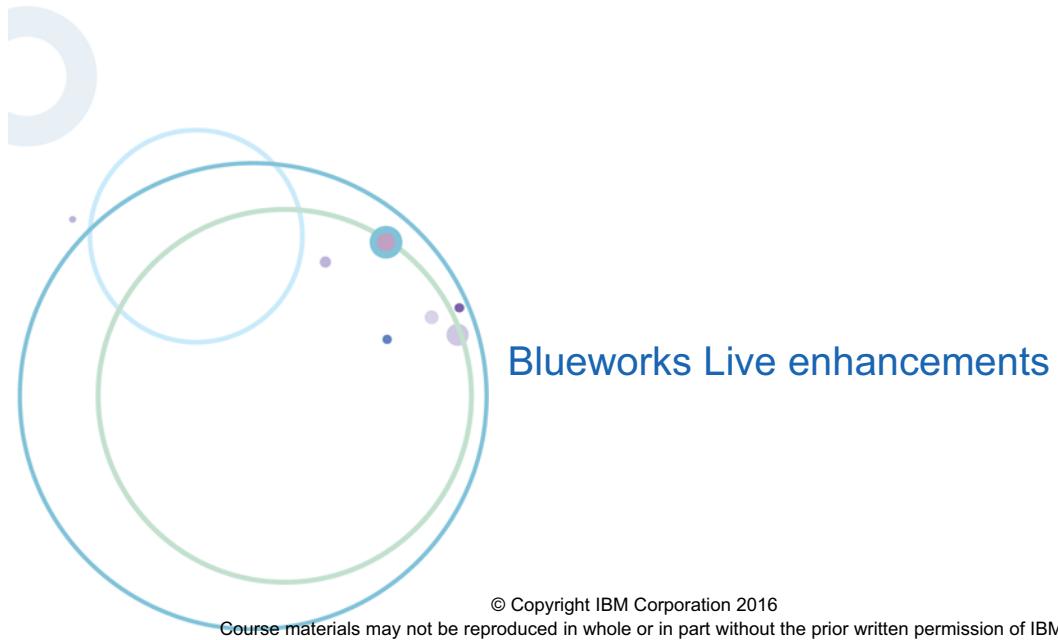
Figure 3-2. Topics

ZB0302.0

Notes:



Policies



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10.1

Figure 3-3. Policies

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Notes:

The screenshot shows the BlueworksLive interface. At the top, there's a blue header bar with the WebSphere Education logo on the left and the IBM logo on the right. Below the header is a navigation bar with tabs for Work, Community, Library, and a search bar. The main content area is titled "Policies" and shows four items listed:

- Claims Payment Policy** (with a yellow star icon)
- Family and Medical Leave Act (FMLA)**
- Training Policy** (with a yellow star icon)
- Vacation Policy - US**

Each item has a small thumbnail icon, a name, a last modified date, and a dropdown arrow. Below the list is a footer bar with the IBM logo, a link to "Blueworks Live Terms of Use", and a link to "Invite New Users".

Figure 3-4. Overview

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface with the following details:

- Header:** WebSphere Education, IBM logo.
- Top Navigation:** User 1, Admin, Help, Logout, Library search policies.
- Main Navigation:** Work, Community, Library, search policies.
- Sub-navigation:** Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, Templates, Create New Policy.
- Filter:** Active, Policies (4), Name, Date, Tag, Space, Filter.
- Policy List:**
 - Claims Payment Policy**: Last modified by User 1 on 18-Jan-2016.
 - Family and Medical Leave Act (FMLA)**: Last modified by User 1 on 24-Dec-2015.
 - Training Policy**: Last modified by User 1 on 18-Jan-2016. This item has a context menu open:
 - Move Item
 - Where Used
 - Copy Policy** (highlighted with a red box)
 - Archive
 - Vacation Policy - US**: Last modified by User 1 on 24-Dec-2015.
- Bottom:** IBM, Blueworks Live Terms of Use, Invite New Users, © Copyright IBM Corporation 2016.

Figure 3-5. Copy or archive a policy

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface for a 'Vacation Policy - US' example. At the top, there's a navigation bar with 'WebSphere Education' and the IBM logo. Below it, the main title 'Policy page' is displayed. The page has a header with 'BlueworksLive', 'Work', 'Community', 'Library', and a search bar. On the left, there's a sidebar with 'Process Examples > Vacation Policy - US' and a '+ Add Tags' button. The main content area is divided into sections: 'Description' (with text about company policy), 'References' (listing 'Family and Medical Leave Act' and '2012 Company Holiday Schedule'), and 'Where Used' (listing 'Hiring - Onboarding' and 'Hiring - Orientation ...'). At the bottom, there are links for 'IBM Blueworks Live Terms of Use', 'Invite New Users', and copyright information.

Figure 3-6. Policy page

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'WebSphere Education' and the IBM logo. Below the navigation bar, the main content area has a title 'Description section'. The left sidebar shows a breadcrumb path 'Process Examples > Vacation Policy - US' and a 'Description' section containing text about company policy. A 'References' section lists two documents: 'Family and Medical Leave Act' and '2012 Company Holiday Schedule'. The right side of the screen displays a 'Where Used' summary with counts for 'Space', 'Processes', 'Decisions', and 'Occurrences'. A large orange box highlights the 'Description' section on both the left and right sides of the screen.

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Figure 3-7. Description section

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'WebSphere Education' on the left and the IBM logo on the right. Below the navigation bar, the main content area has a blue header bar with 'BlueworksLive' and tabs for 'Work', 'Community', and 'Library'. A search bar is at the top right.

The main content area displays a 'Vacation Policy - US' document. On the left, there's a 'Description' section and a 'Annual Holidays' list (New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day). On the right, there's a 'References' section. This section is highlighted with an orange box and contains two items:

- Family and Medical Leave Act** (Added on 13-Apr-2012)
- 2012 Company Holiday Schedule** (Added on 13-Apr-2012)

Below this, another 'References' section is shown in a separate box, also highlighted with an orange box. It lists the same two documents with their addition dates.

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Figure 3-8. References section

ZB0302.0

Notes:

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'WebSphere Education' and the IBM logo. Below the navigation bar, the main content area has a title 'Where Used section'. The interface is divided into several sections:

- Header:** Shows 'User 1 Admin Help Logout' and a search bar.
- Breadcrumbs:** 'Process Examples > Vacation Policy - US'.
- Description:** A detailed description of the company's paid holiday and vacation policy in the United States.
- Annual Holidays:** A list of holidays including New Year's Day, Memorial Day, Independence Day, Labor Day, and Thanksgiving Day.
- Where Used Section:** This section is highlighted with a red box and contains the following data:

1 Space	2 Processes	0 Decisions	3 Occurrences
Hiring - Onboarding Last modified on 24-Dec-2015	Process Examples		
Hiring - Orientation CD Ge... Last modified on 24-Dec-2015	Process Examples		

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Figure 3-9. Where Used section

ZB0302.0

Notes:



Where Used: Activity example

BluworksLive Work Community Library User 1 Admin Help Logout

Process Examples > Hiring - Onboarding

Discovery Map Process Diagram Documentation Analyze Zoom

Hiring - Onboarding

Select Candidate → Background Check → Offer → Add Candidate To HR Records → Orientation

Establish Compensation Package

Establish Compensation Package Decision

Policies (1)

Vacation Policy - US

The following details describe our company's paid holiday and vacation policy in the United States. For other locales, please see the appropriate policy. This policy observes all federal laws. Annual Holidays New Year's Day Memorial Day Independence Day Labor Day Thanksgiving Day Christmas Day Floating Holidays ...

Attachments (0)

There are currently no files attached.

Establish Compensation Package Policies (1) Vacation Policy - US

The following details describe our company's paid holiday and vacation policy in the United States. For other locales, please see the appropriate policy. This policy observes all federal laws. Annual Holidays New Year's Day Memorial Day Independence Day Labor Day Thanksgiving Day Christmas Day Floating Holidays ...

Add Comment

Invite New Users

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Figure 3-10. Where Used: Activity example

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface with the 'Claims Payment' process selected. On the left, the 'Process Outline' sidebar shows the flow from 'Payment Made' to 'Beneficiary'. The main workspace displays the 'Claims Payment' activity. A modal window titled 'Beneficiary receives EOB' is open, showing the 'Policies' tab selected. A red box highlights the 'Policies' tab. Below it, a dropdown menu lists available policies: 'Claims Payment Policy' (in Training Space), 'Family and Medical Leave Act (FMLA)' (in Process Examples), 'Training Policy' (in Training Space), and 'Vacation Policy - US' (in Process Examples).

Figure 3-11. Adding a policy to a process

ZB0302.0

Notes:

Topic review

- Policies are useful in a business process because they support in making critical decisions
- Adding policies to a Blueworks Live account is available
- The Policies repository page is accessed through the Blueworks Live library for the account
- Users with permission create policies
- Policies that are listed in the repository can be copied, archived, and in the case of archived policies, they can be restored to active status
- Policy data can be entered or edited in the policy page
- A policy page provides three sections of information: Details, References, and Where Used
- Editors can add or associate a policy to a Blueprint process activity

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Figure 3-12. Topic review

ZB0302.0

Notes:

Where Used

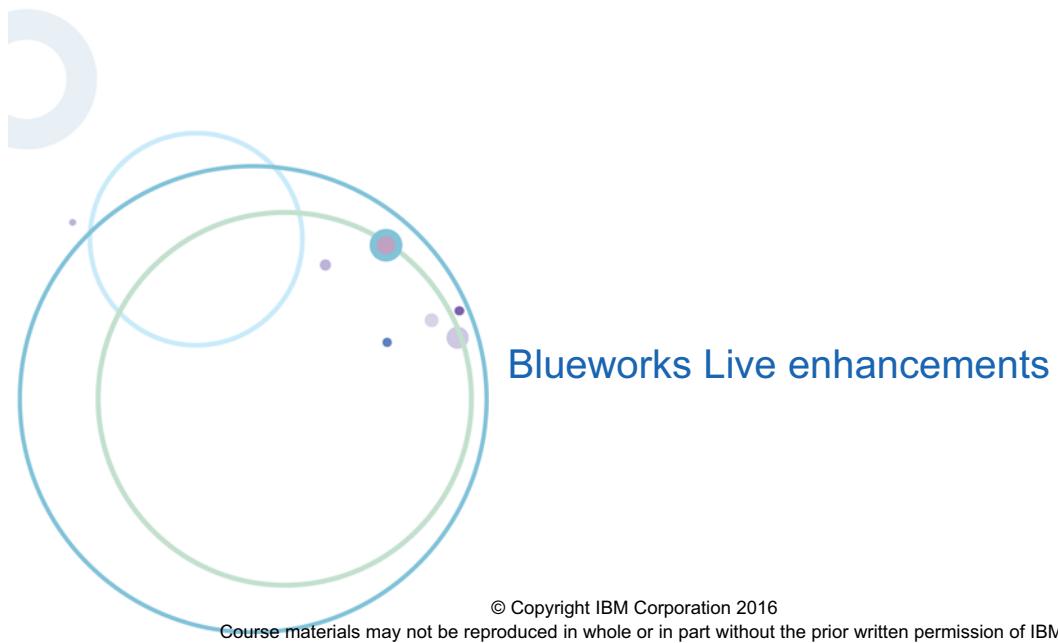


Figure 3-13. Where Used

10.1

ZB0302.0

Notes:



Overview

The screenshot shows the BlueworksLive application interface. At the top, there's a navigation bar with 'User 1 Admin Help Logout'. Below it, the main area shows a 'Process Examples > Hiring - Orientation CD Generation' page. On the left, there's a sidebar with options like 'Discovery Map', 'Process Diagram', and several blue rectangular buttons labeled 'Create Orientation CD', 'Generate cd request', 'Burn orientation cd', and 'Mail orientation cd'. The main content area displays the 'Hiring - Orientation CD Generation' process details. A context menu is open over the process title, listing options such as 'View Work History', 'View Process Summary', 'Where Used' (which is highlighted with a red box), 'Manage Space Participants', 'Get a link to this process', 'Export to Word', 'Export to PowerPoint', 'Export Process', 'Print PDF', and 'Copy Process'. To the right of the menu, the process details are shown, including sections for Business Owners (Human Resources), Experts (Human Resources), Inputs (Employee Address), Outputs (Orientation CD), and Policies (0). At the bottom right of the main area, there's a 'Add Comment' button and a 'Invite New Users' link.

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Figure 3-14. Overview

ZB0302.0

Notes:

The screenshot shows the BlueworksLive interface with the 'Where Used' dialog box open. The title bar reads 'Where Used dialog box'. The main content area is titled 'Where Used: Hiring - Orientation CD Generation'. It displays three categories: '1 Space', '1 Process', and '1 Activity'. The '1 Process' category is selected, showing a single result: 'Hiring - Onboarding' (Last modified on 24-Dec-2015). The left sidebar shows a 'Discovery Map' for 'Hiring - Orientation' with several steps: 'Create Orientation CD', 'Generate cd request', 'Burn orientation cd', and 'Mail orientation cd'. The top navigation bar includes 'Work', 'Community', 'Library', and a search bar. The top right corner shows user information ('User 1 Admin Help Logout') and status indicators ('Published', 'Edit'). The bottom right corner contains copyright information: '© Copyright IBM Corporation 2016'.

Figure 3-15. Where Used dialog

ZB0302.0

Notes:



Following an item

BluworksLive Work Community search User 1 Admin Help Logout

Process Examples > Hiring - Orientation CD Generation Published Edit

Discovery Map Process Diagram Documentation

Create Orientation CD

HR Specialist HR Docs Team

Start → Generate cd request → Burn orientation cd → Mail orientation cd → End

Hiring - Orientation CD Generation

Details Docs Changes

Business Owners Human Resources

Experts Human Resources

Inputs Employee Address

Outputs Orientation CD

Policies (0) There are currently no policies attached.

Attachments (0) There are currently no files attached.

IBM Bluworks Live Terms of Use Invite New Users

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Figure 3-16. Following an item

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Notes:

Topic review

- “Where Used” functions in a Blueprint process provides a contributor the context to evaluate item details that are captured for the process model
- Details for a process model can be viewed when the Blueprint process is shared
- A user can click items that are listed in the Details Pane to access the “Where Used” information
- A user can choose to follow an item from a Blueprint process by clicking the star icon to the right of the item name
- Items that are followed can be accessed in the **Work > Work I'm following** section of Blueworks Live
- Items are listed in the **Work > Work I'm following > Values** section in categories
- Clicking an item in the **Work > Work I'm following > Values** list brings up the same “Where Used” dialog box as in the Details pane

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Figure 3-17. Topic review

ZB0302.0

Notes:



Playback

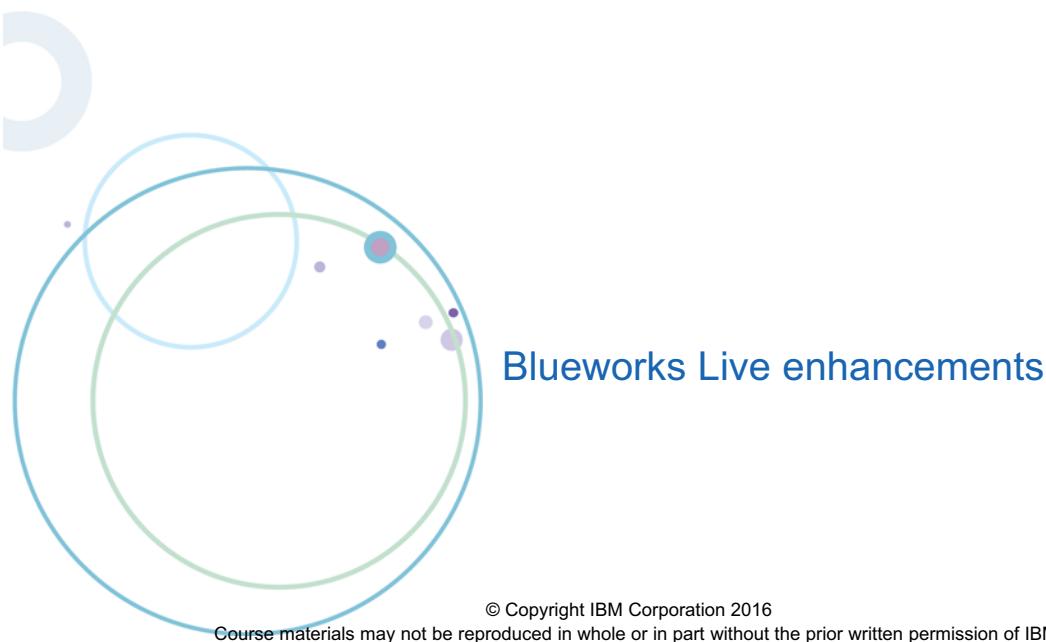


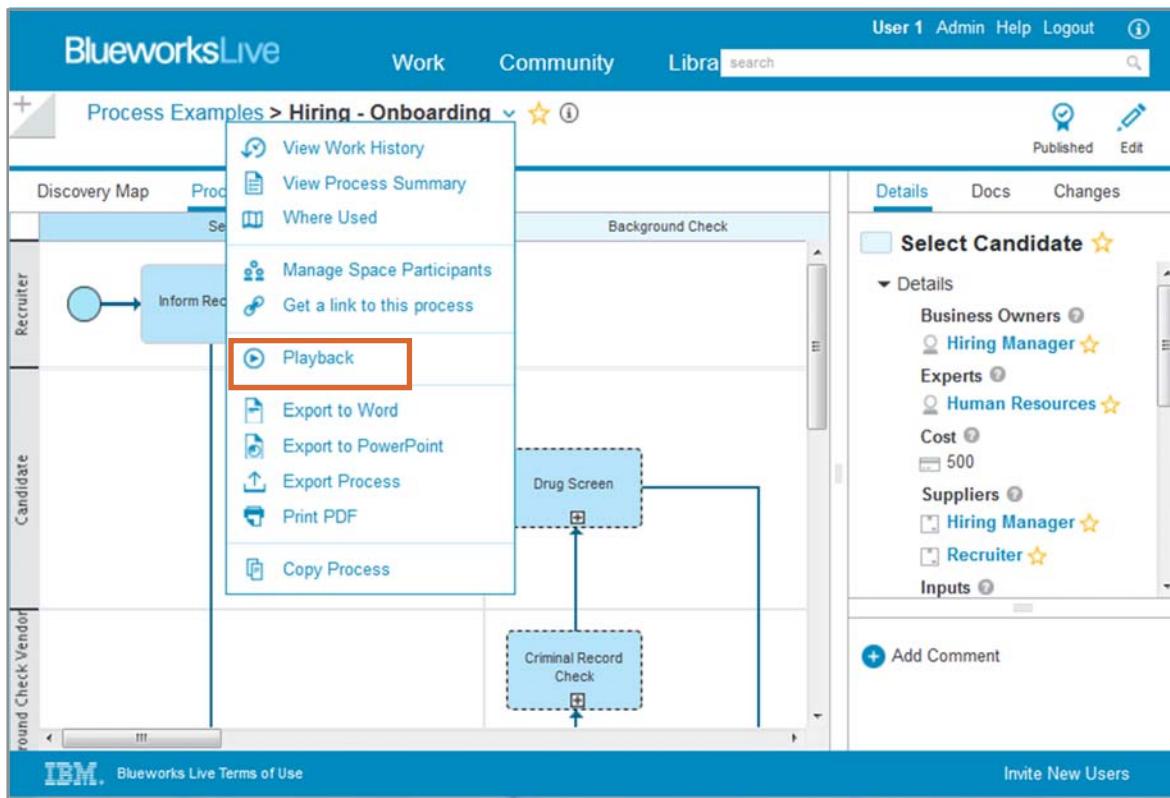
Figure 3-18. Playback

ZB0302.0

Notes:



Overview



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Figure 3-19. Overview

ZB0302.0

Notes:



Playback user interface

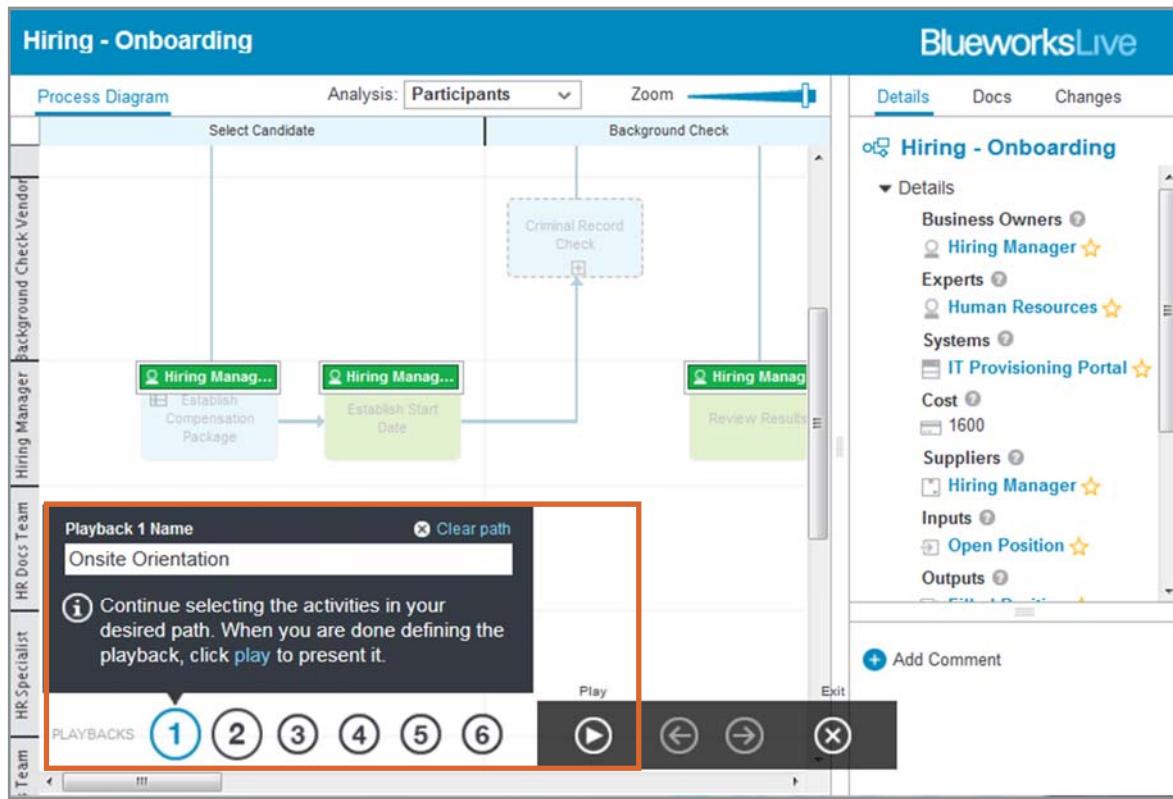


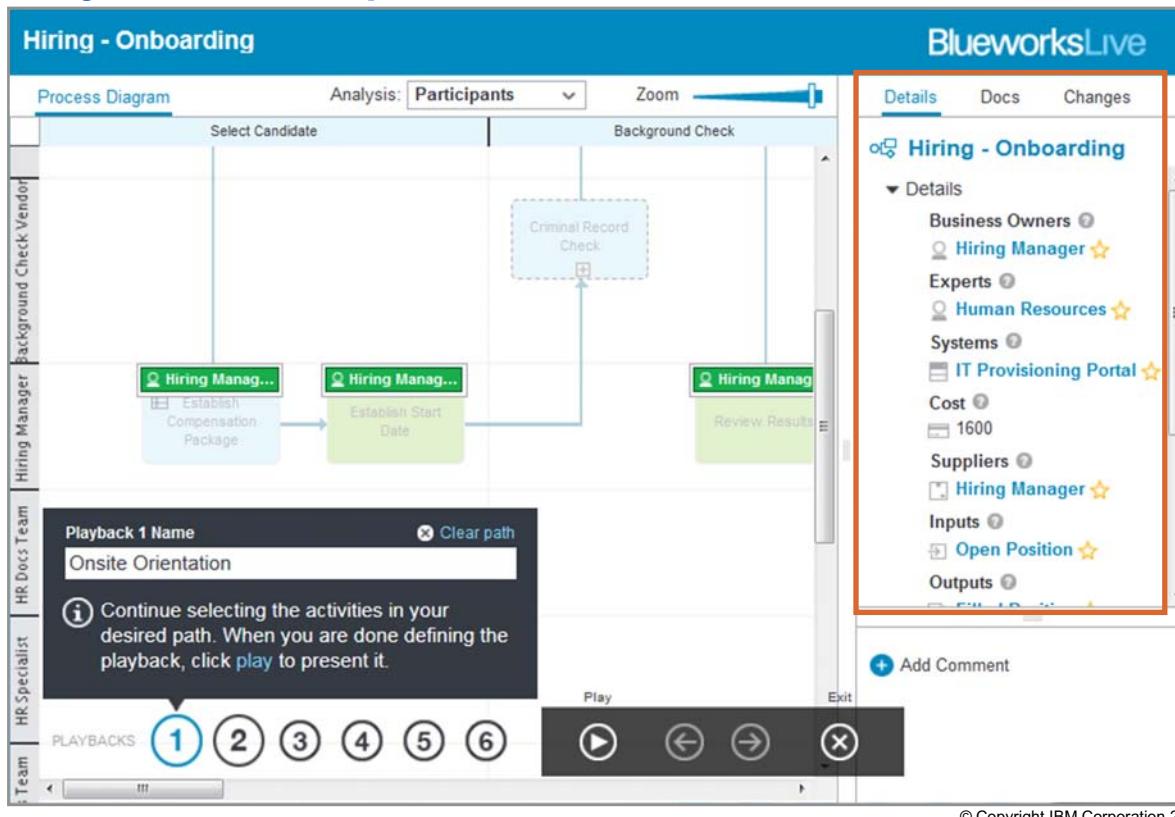
Figure 3-20. Playback user interface

ZB0302.0

Notes:



Playback Details panel



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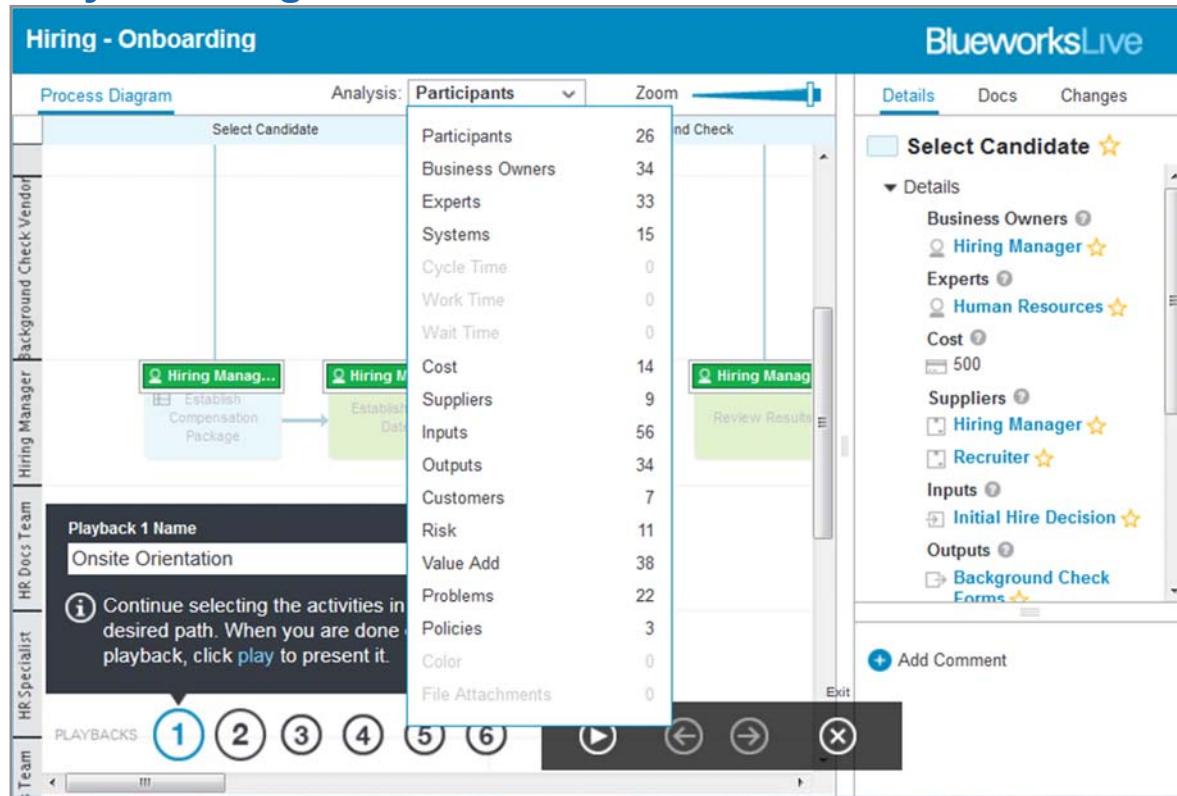
Figure 3-21. Playback Details panel

ZB0302.0

Notes:



Playback diagram menu



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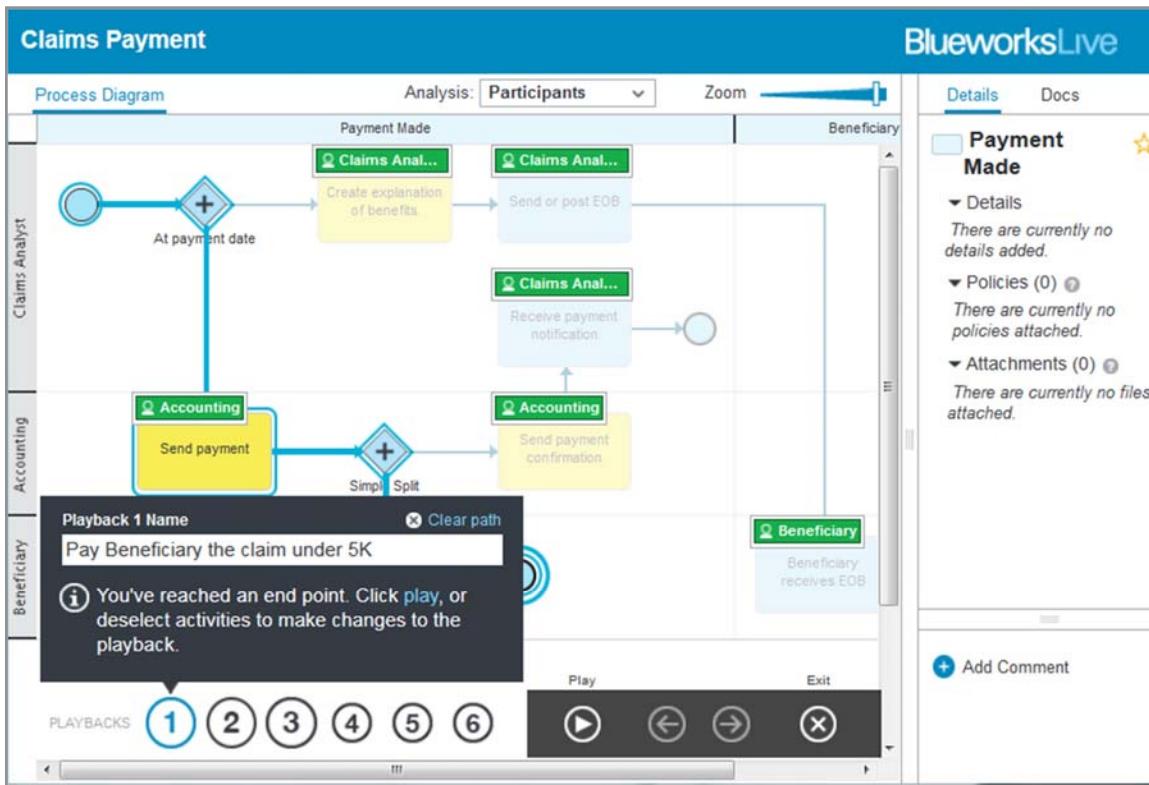
Figure 3-22. Playback diagram menu

ZB0302.0

Notes:



Process diagram



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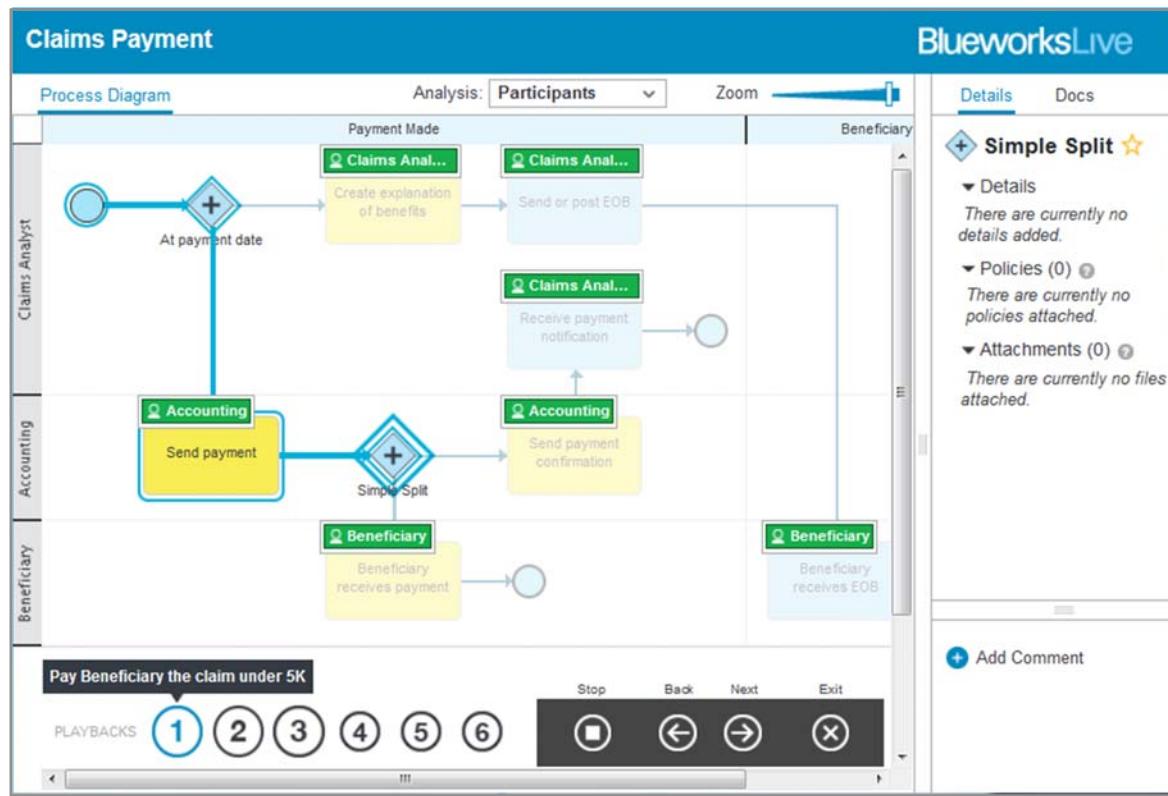
Figure 3-23. Process diagram

ZB0302.0

Notes:



Conducting a playback



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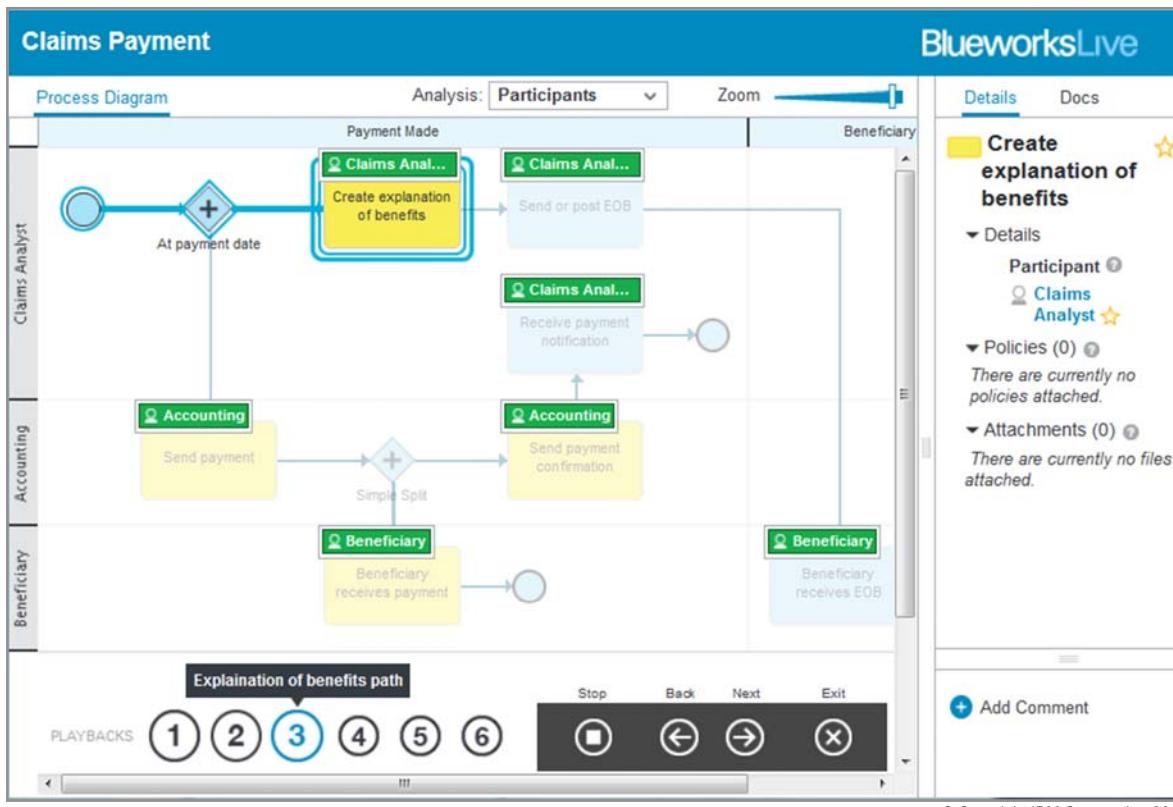
Figure 3-24. Conducting a playback

ZB0302.0

Notes:



Group defined process diagram path



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Figure 3-25. Group defined process diagram path

ZB0302.0

Notes:



Topic review

- Playbacks are themed sessions in a process modeling analysis effort to validate work that is completed at interim times in the development
- Blueworks Live allows project teams to walk through process diagrams on an item by item basis to validate the element
- Details for each item, or element, is provided in the Details pane for the playback user interface
- Playback groups can add comments that are based on information that is provided during the session
- To conduct a playback of the process diagram, a path is chosen from the green numbered icons at the bottom of the screen and the “Play” icon on the controller is clicked
- Click the “Next” icon on the controlled to review each activity in the process diagram

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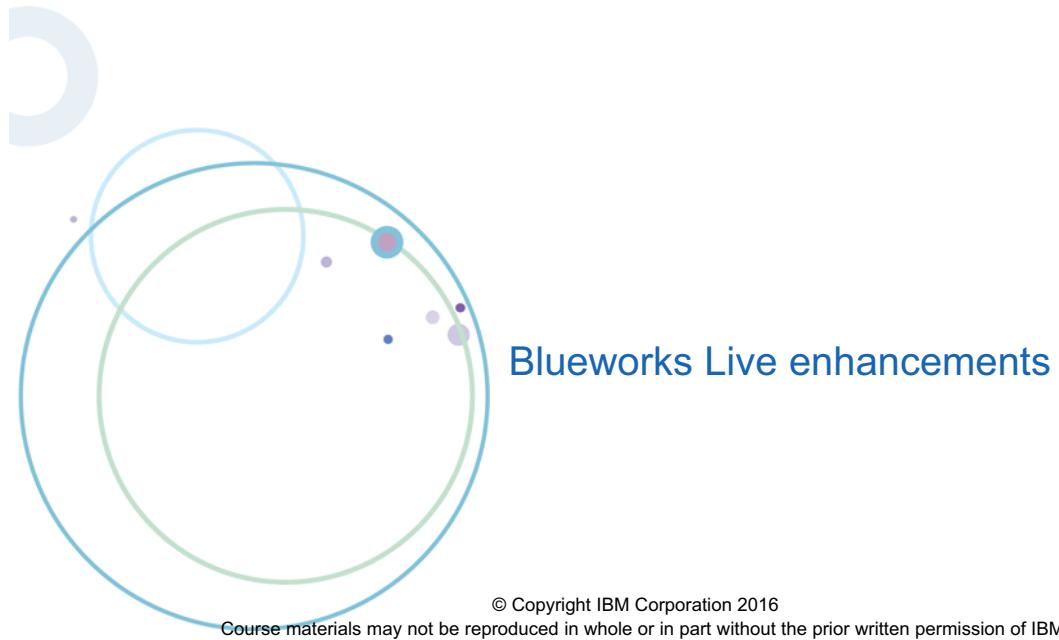
Figure 3-26. Topic review

ZB0302.0

Notes:



Governance



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10.1

Figure 3-27. Governance

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Notes:



Overview

- Stakeholders are automatically notified when their review or approval is needed
- Stakeholder responses and comments are continuously tracked; process owner is notified when approval is complete
- Audit history is retained of approvals, rejections, and comments
- Manage the lifecycle of business assets in the Blueworks Live
- Govern changes at the artifact version level
 - Edit, Review, Approve, and Publish versions of blueprints and decisions
 - Clearly identify the “version of record” of an artifact

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Figure 3-28. Overview

ZB0302.0

Notes:



Governance functionality

- Define Governance Workflows
 - Create review and approval workflows
 - Configure these workflows with both sequential and parallel tasks
- Launch a Governance Workflow
 - Directly from the process or decision diagram

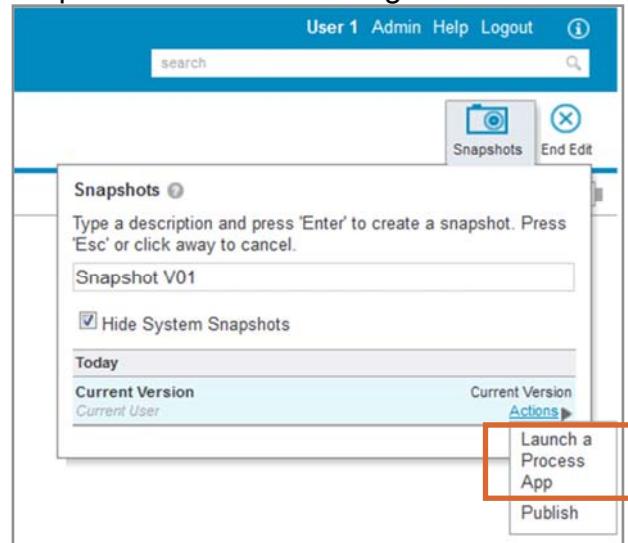


Figure 3-29. Governance functionality

ZB0302.0

Notes:



Governance functionality (continued)

- Participate in a Governance Workflow
 - Reviewers and approvers are notified and given a link to the diagram to review
- Control Visibility and Access to Artifacts
 - Publish the approved version of an artifact

User 1 Admin Help Logout

search

Snapshots

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

Snapshot V01

Hide System Snapshots

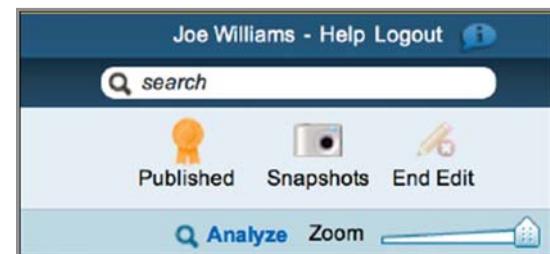
Today

Current Version Current User

Actions ▾

Launch a Process App

Publish



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Figure 3-30. Governance functionality (cont..)

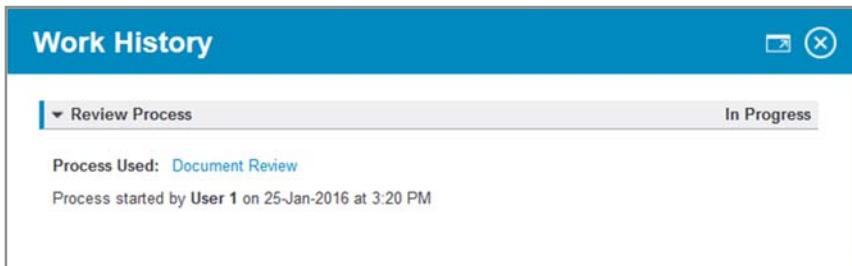
ZB0302.0

Notes:



Review governance history for auditing

- Review Details of Executed Workflows for Audit purposes
 - See who approved and when, and what comments they made
- All of the governance workflows executed throughout the life of an artifact can be viewed from the process or decision diagram



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Figure 3-31. Review governance history for auditing

ZB0302.0

Notes:

Exercise 5



Capturing a policy in a Blueworks Live blueprint

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10.1

Figure 3-32. Exercise 5Capturing a policy in a Blueworks Live blueprint

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Notes:



Exercise objectives

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

- Capture a policy in a Blueworks Live blueprint

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Figure 3-33. Exercise objectives

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Notes:

Exercise 6



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Figure 3-34. Exercise 6Conducting a playback

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Notes:



Exercise objectives

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

- Conduct a playback in Blueworks Live

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Figure 3-35. Exercise objectives

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Notes:



Unit summary

Having completed this unit, you should be able to:

- Establish and enable policies for process models in Blaworks Live
- Enable the “where used” functions in Blaworks Live
- Conduct playbacks in Blaworks Live
- Implement built-in governance for process and decision models

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Figure 3-36. Unit summary

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Notes:

Unit 4. Course summary

What this unit is about

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

What you should be able to do

After completing this unit, you should be able to:

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



Unit objectives

After completing this unit, you should be able to:

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

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Figure 4-1. Unit objectives

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Notes:

Course learning objectives

After completing this course, you should be able to:

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

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Figure 4-2. Course learning objectives

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Notes:



To learn more on the subject

- IBM Training website:

www.ibm.com/training

- Training paths:

<http://www.ibm.com/services/learning/trainingpaths>

- Training Paths that reference this course are:

- Business Analyst Skills for IBM Business Process Manager Express or Standard V7.5.1
 - BPM Process Owner Skills for IBM Business Process Manager Express or Standard V7.5
 - BPM Analyst skills for IBM WebSphere Lombardi Edition V7.1/7.2
 - BPM Program Manager skills for IBM Business Process Manager Express or Standard V7.5
 - BPM Program Manager skills for IBM Business Process Manager Express or Standard V7.5.1
 - BPM Process Owner Skills for IBM Business Process Manager Express or Standard V7.5.1
 - Business Analyst Skills for IBM Business Process Manager Express or Standard V7.5
 - Business Analyst skills for IBM Business Process Manager Advanced V7.5

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Figure 4-3. Class evaluation

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Notes:



References

- **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>

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Figure 4-4. To learn more on this WebSphere subject

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Notes:



Unit summary

Having completed this unit, you should be able to:

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

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Figure 4-5. Training path

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Notes:

Course summary



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Figure 4-6. References

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Notes:

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Figure 4-7. Unit summary

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Notes:

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

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

F

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

N

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

Q**R****REST** Representational State Transfer**ROM** Rough order of magnitude**RUP** Rational Unified Process**S****SDK** software development kit**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**XSD** XML Schema Definition**XSL** Extensible Stylesheet Language**XSLT** Extensible Stylesheet Language Transformation

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