

Playback zero - Process Discovery

Unit objectives

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



About process discovery

Topics

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



Overview

Playback zero

Definition

1 - 3 weeks

Descriptive modeling

Analytical modeling

Validate

Discovery

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

As is model

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

Analysis

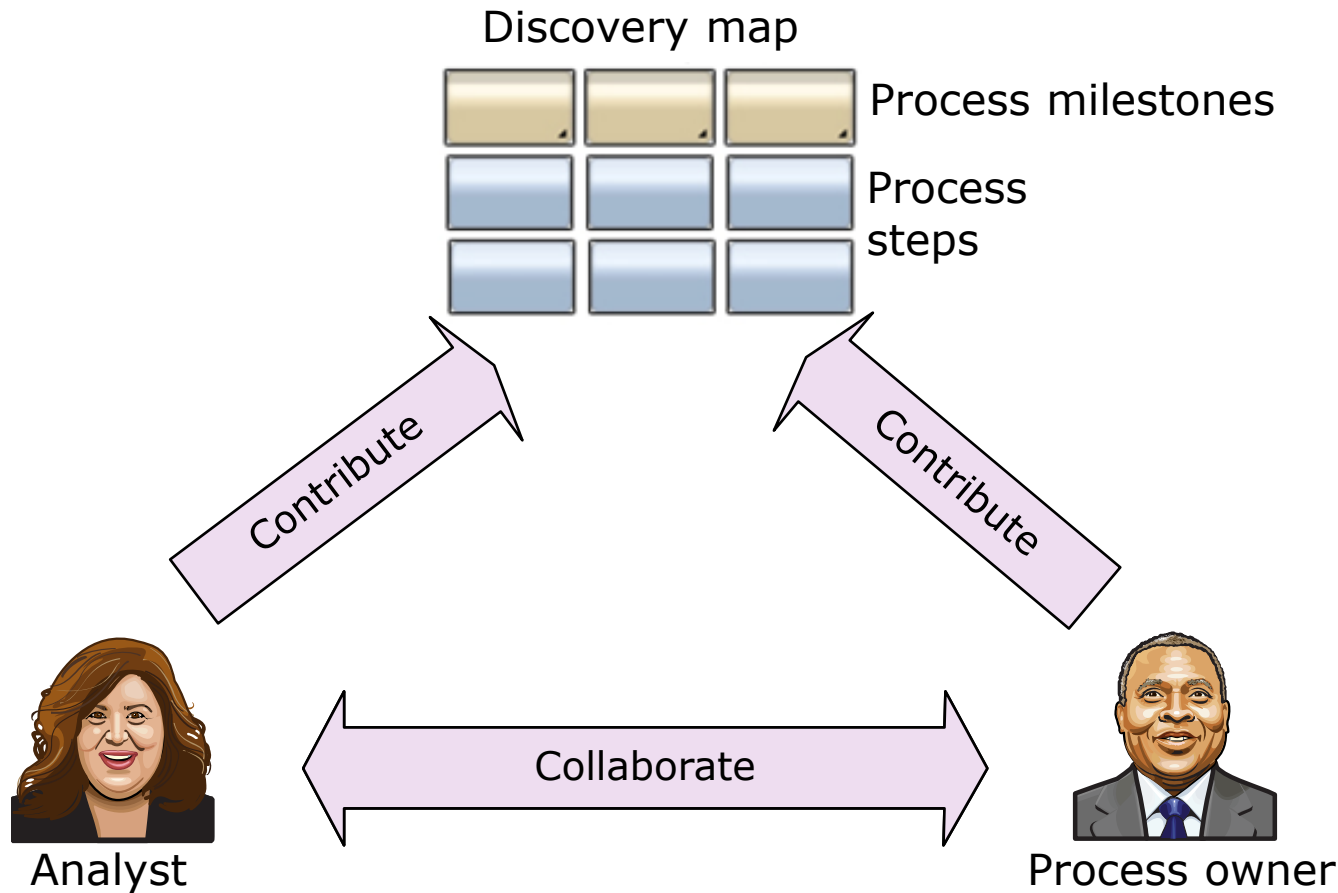
- Refine the current state process model
- Added value analysis
- Root cause analysis
- Opportunity prioritization
- Process simulation

To be model

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

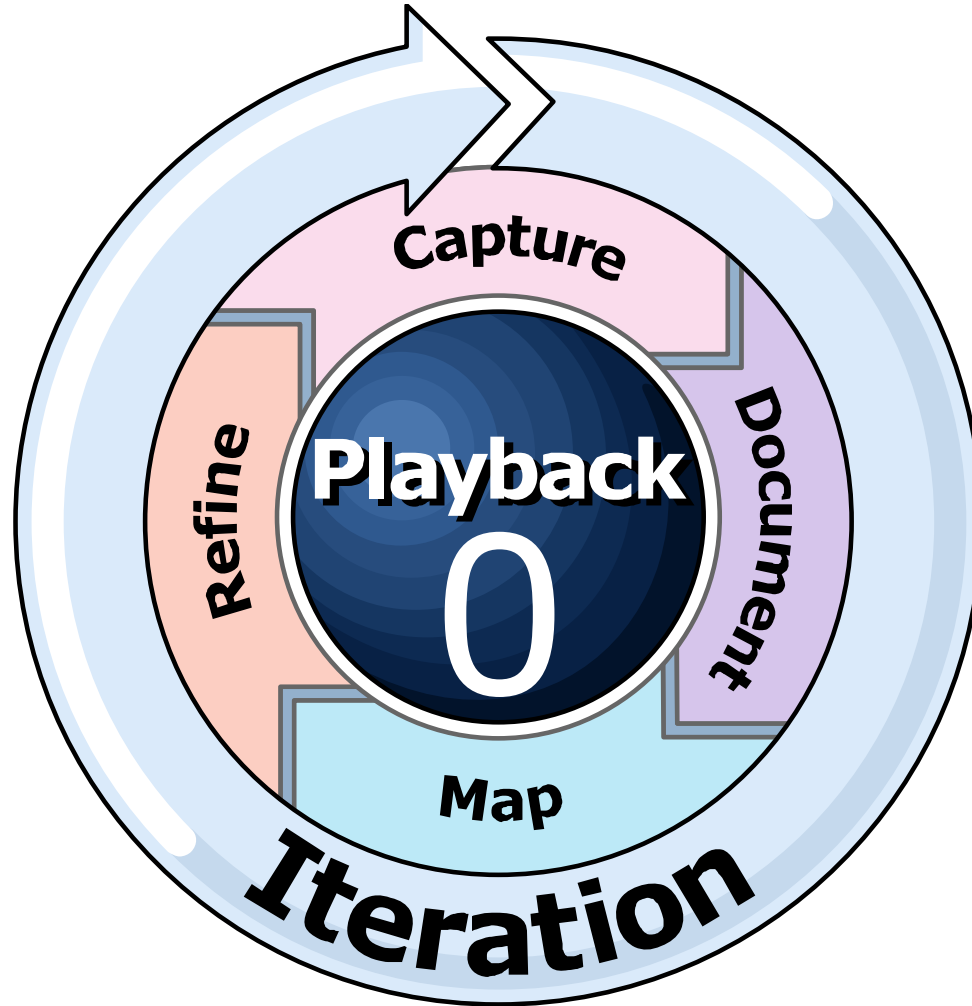
Final Playback

Collaboration



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

Iteration



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

Section recap

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

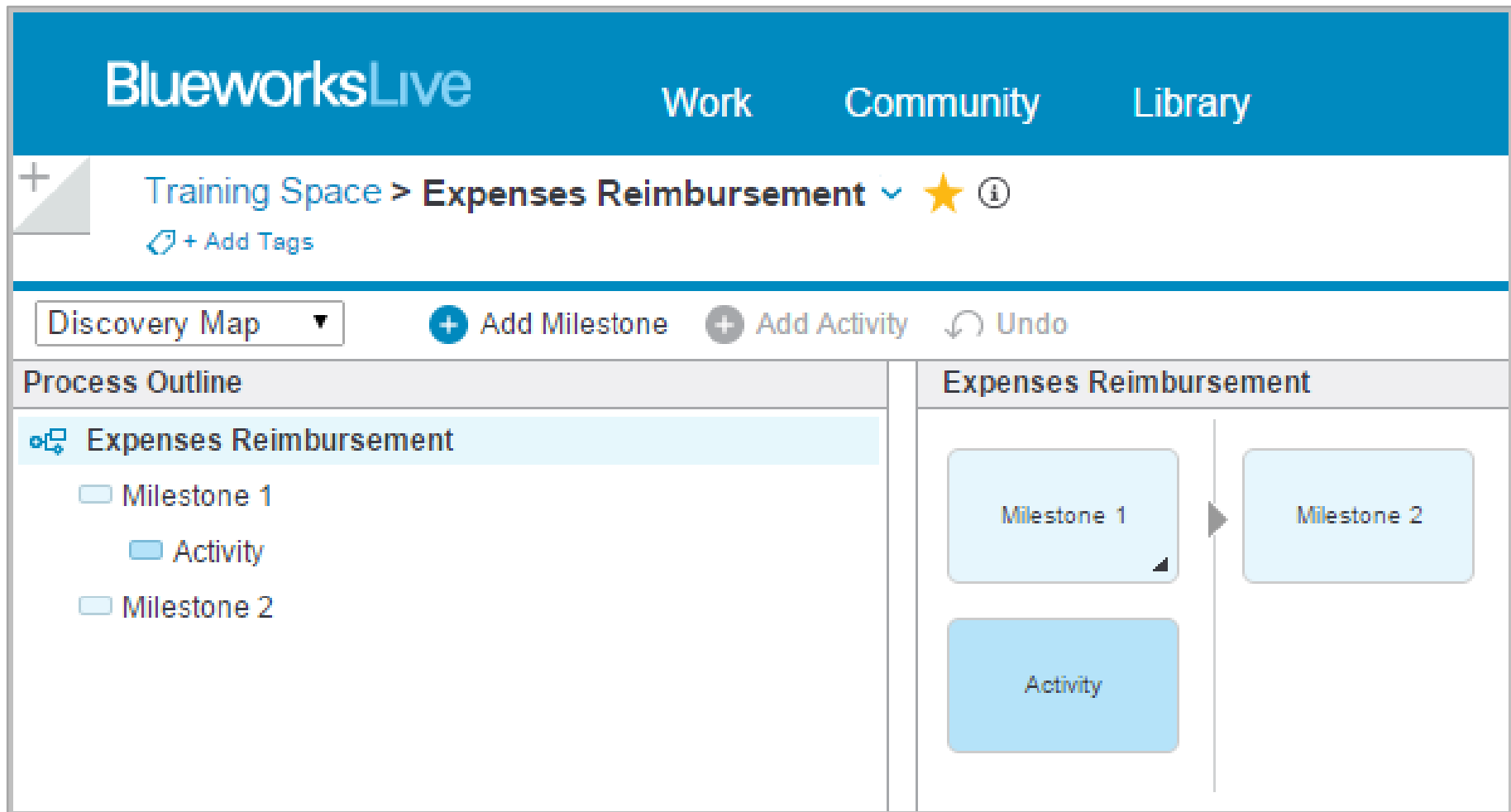
Creating a discovery map

Topics

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






Overview



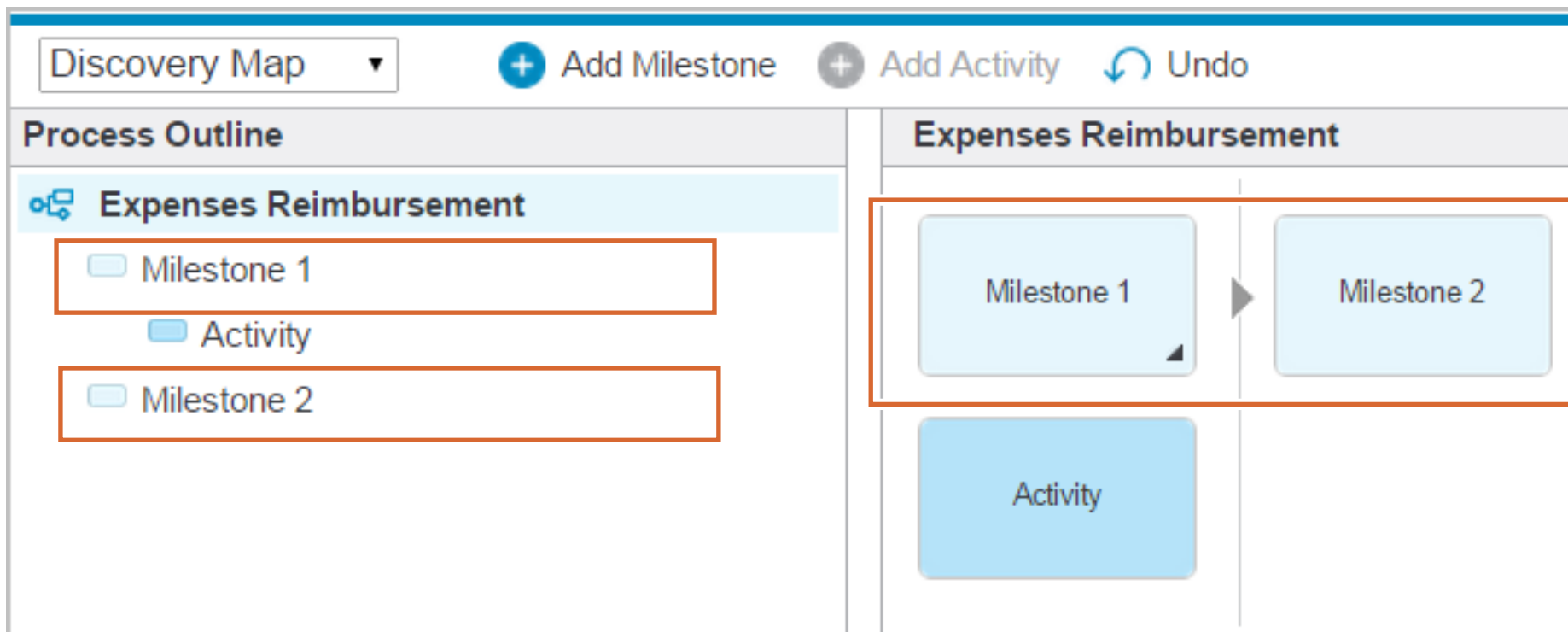
- Milestones, activities, and subprocesses are the elements in a process discovery map

Discovery map elements and BPMN



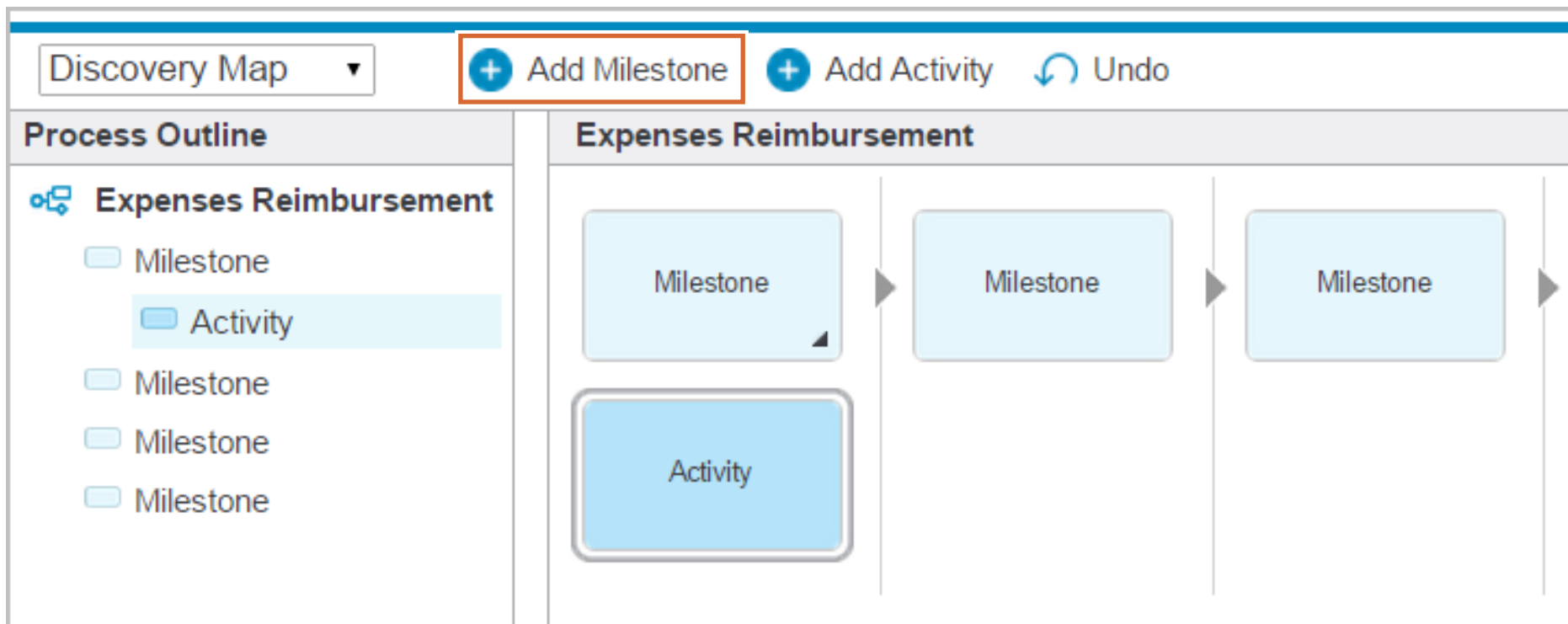
Element	Description
	<ul style="list-style-type: none">• Use a milestone in a discovery map to communicate a particular process phase• Milestones are not a BPMN standard, but an important element in IBM Blueworks Live
	<ul style="list-style-type: none">• Use an activity to communicate a process task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

Milestones



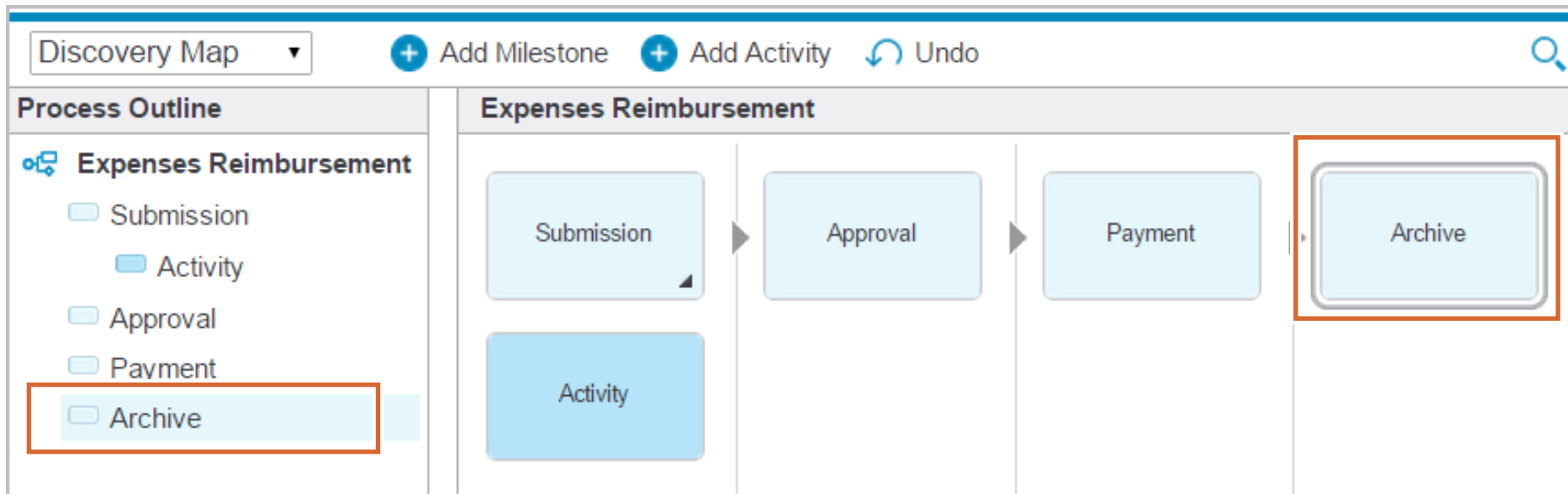
- Milestones are used to define a particular process phase

Milestone example: Expense reimbursement (1 of 2)



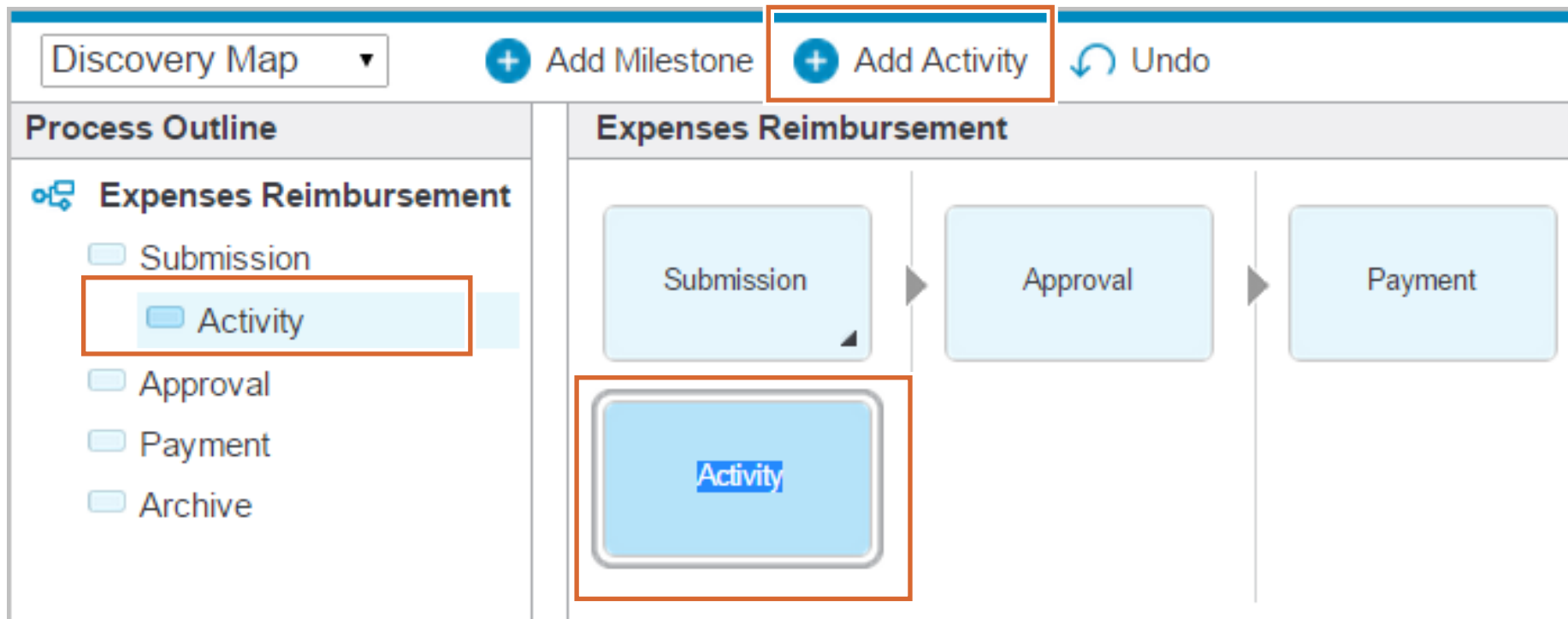
- Click **Add Milestone** to add more milestones

Milestone example: Expense reimbursement (2 of 2)



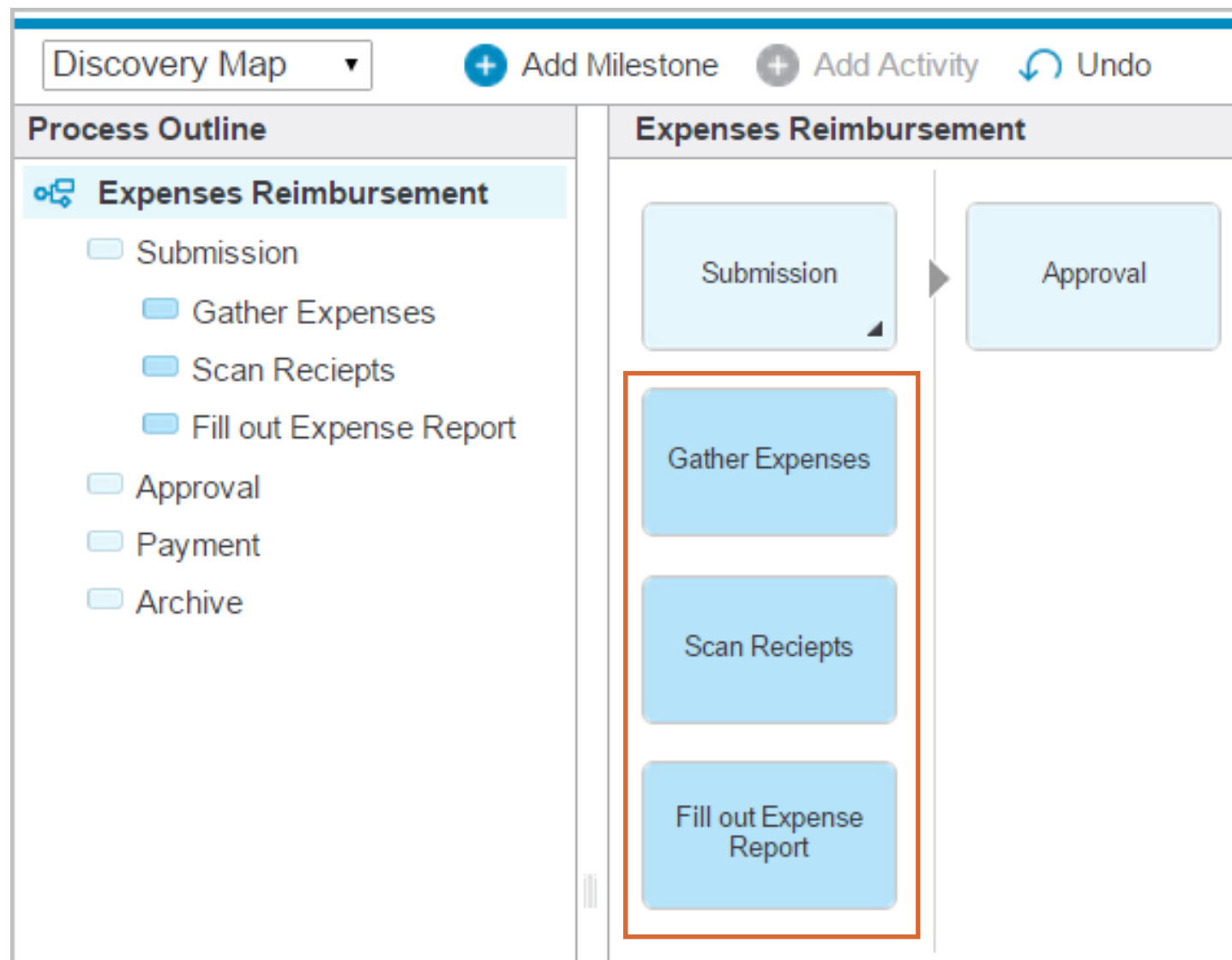
- Process milestones are arranged in the order in which they are completed

Activity

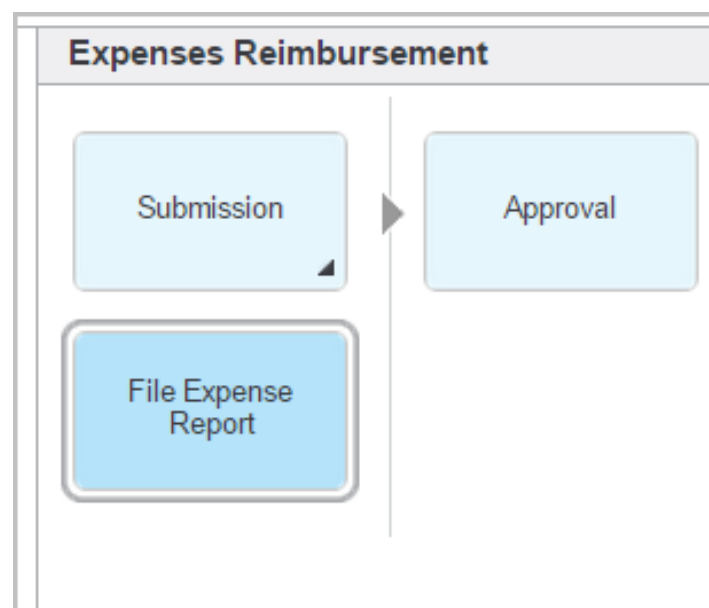
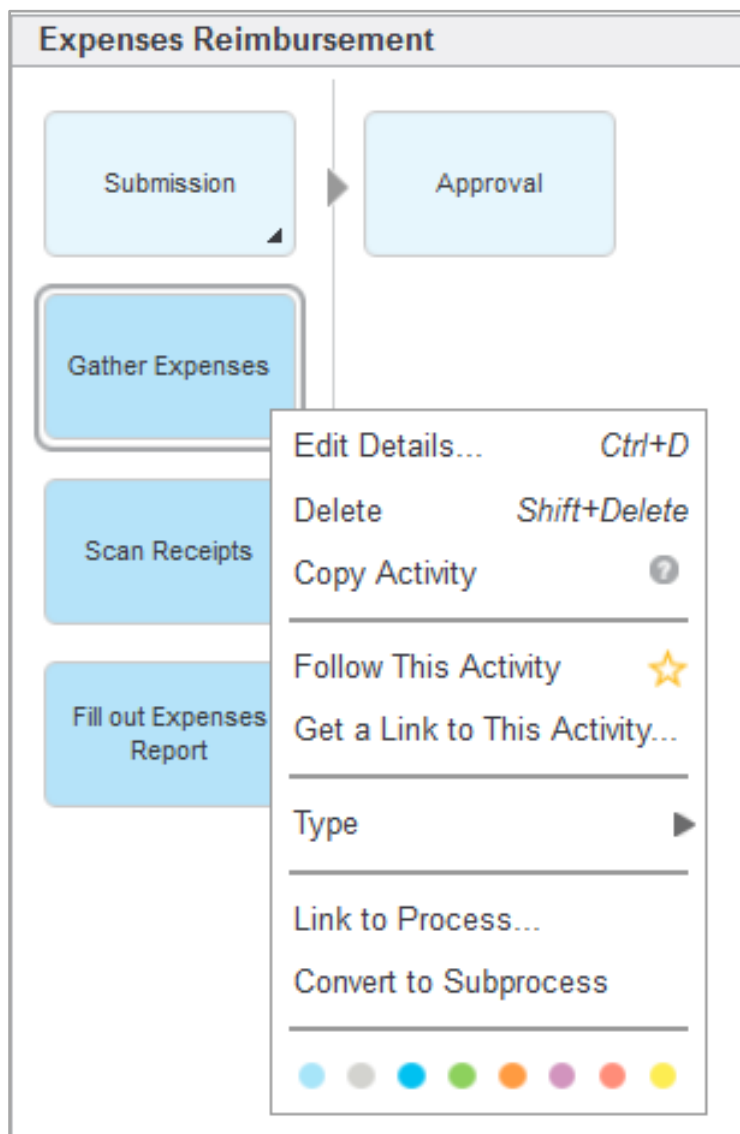


- An activity represents an atomic unit of work that a responsible party in a process completes

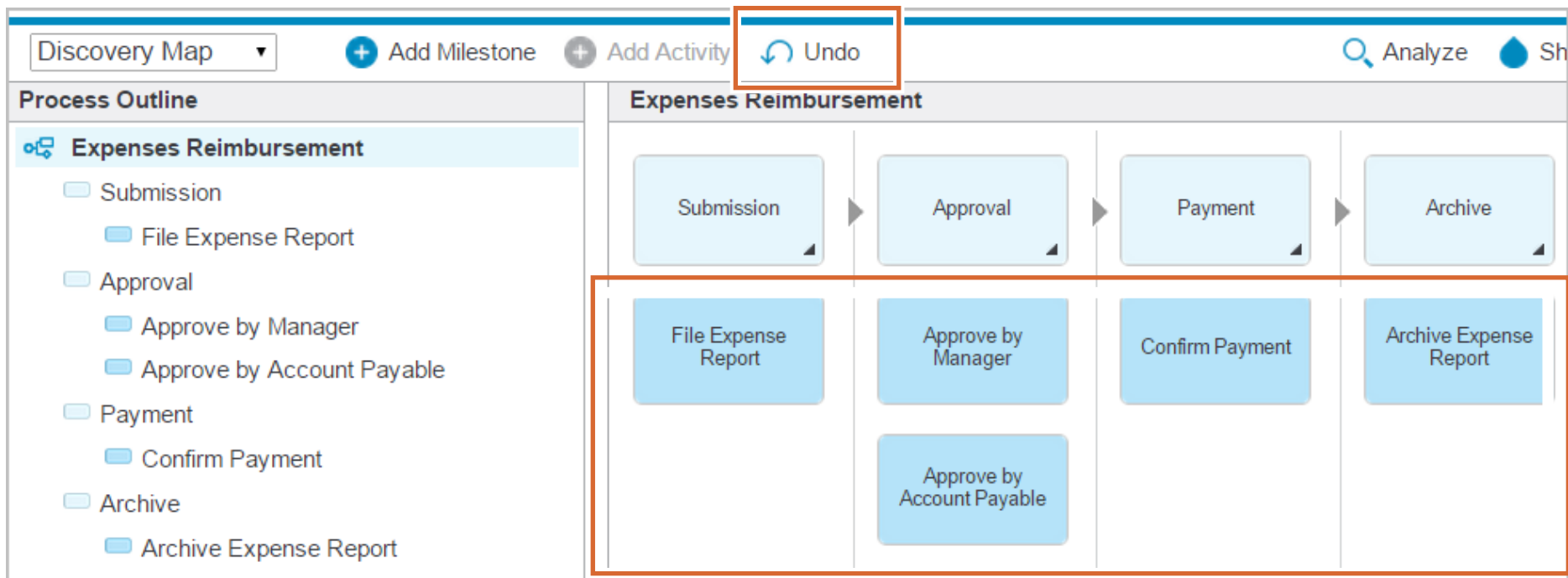
Activity example: Expense reimbursement steps



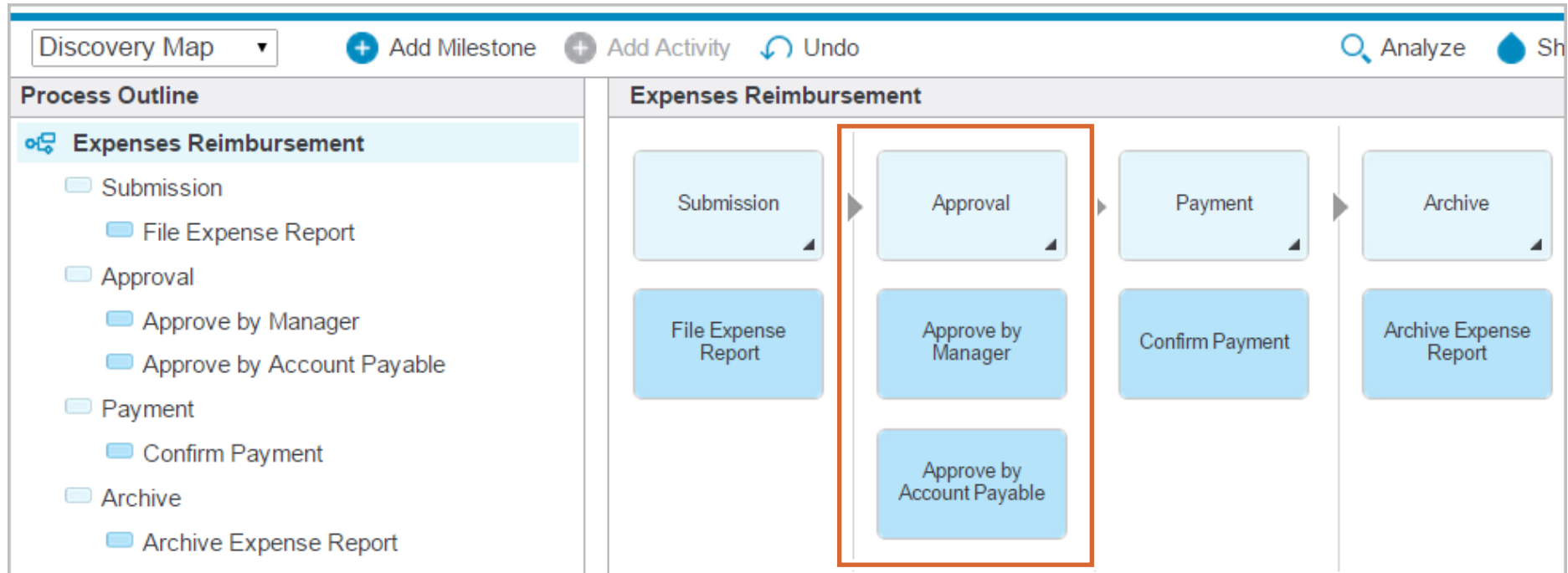
Activity example: Expense reimbursement activity



Activity example: Expense reimbursement final activities



Subprocess



- A subprocess is an activity that different business units complete

Subprocess example: Expense reimbursement (1 of 3)

Discovery Map + Add Milestone + Add Activity ↶ Undo 🔍 Analyze 💧 St

Process Outline

- ☐ Expenses Reimbursement
 - ☐ Submission
 - ☐ File Expense Report
 - ☐ Approval
 - ☐ Approve by Manager
 - ☐ Approve by Account Payable
 - ☐ Payment
 - ☐ Confirm Payment
 - ☐ Archive
 - ☐ Archive Expense Report

Expenses Reimbursement

Submission → Approval → Payment → Archive

File Expense Report

Approve by Manager

Approve by Account Payable

Confirm Payment

Archive Expense Report

Edit Details... *Ctrl+D*

Delete *Shift+Delete*

Copy Activity ?

Follow This Activity ★

Get a Link to This Activity...

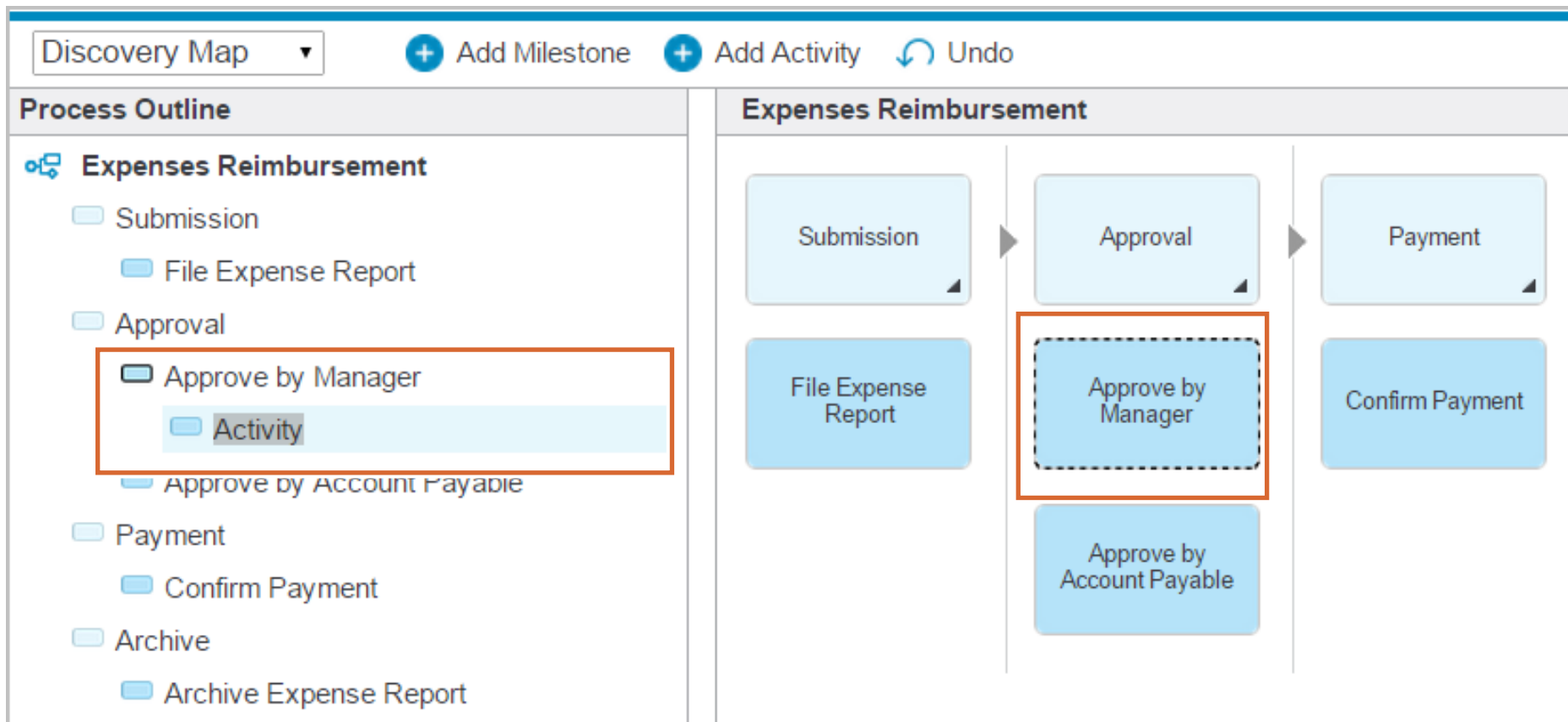
Type ▶

Link to Process...

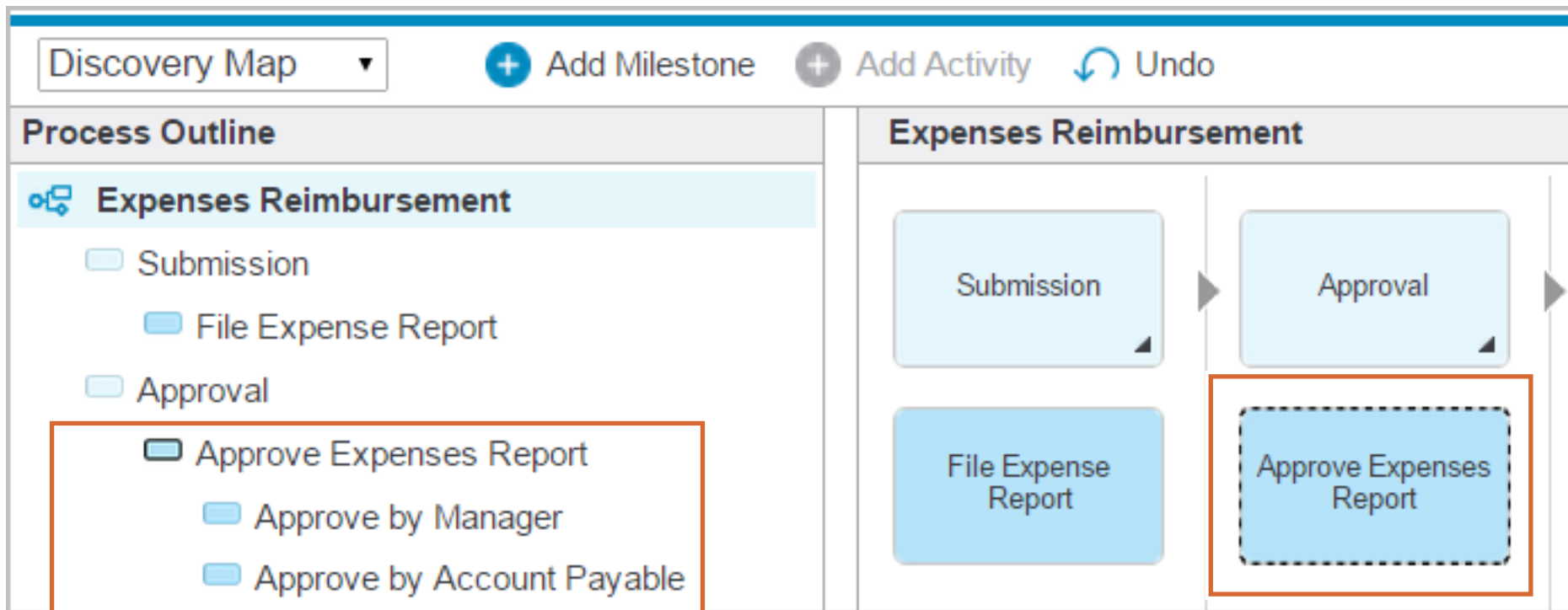
Convert to Subprocess

● ● ● ● ● ● ● ●

Subprocess example: Expense reimbursement (2 of 3)



Subprocess example: Expense reimbursement (3 of 3)



Create a snapshot

The screenshot shows the IBM Training interface with the 'Expenses Reimbursement' process selected. A 'Snapshots' dialog box is open, allowing the user to create a snapshot of the current process state. The dialog includes a text input field for a description, a checkbox for 'Hide System Snapshots', and a table of existing snapshots.

Training Space > Expenses Reimbursement ★ ⓘ

+ Add Tags

Discovery Map + A

Process Outline

- Expenses Reimbursement
 - Submission
 - File Expense Report
 - Approval
 - Approve Expenses Report
 - Approve by Manager
 - Approve by Account

Snapshots ?

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

☐ Hide System Snapshots

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

Yesterday	
Autosnapshot BWL Admin	1:49 PM Actions

Revision history

Snapshots

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

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

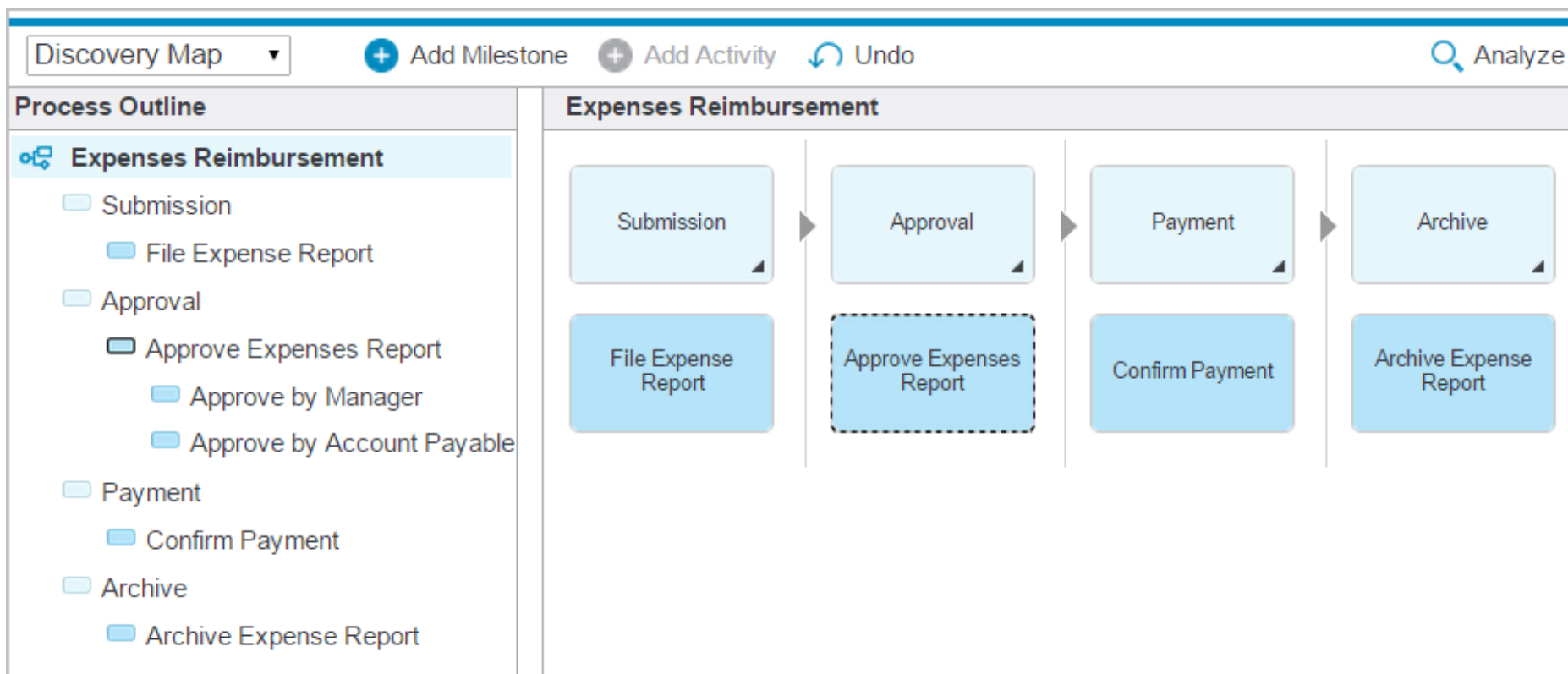
Today

Current Version	Now
BWL Admin	Actions
Autosnapshot	5:50 PM
BWL Admin	Actions

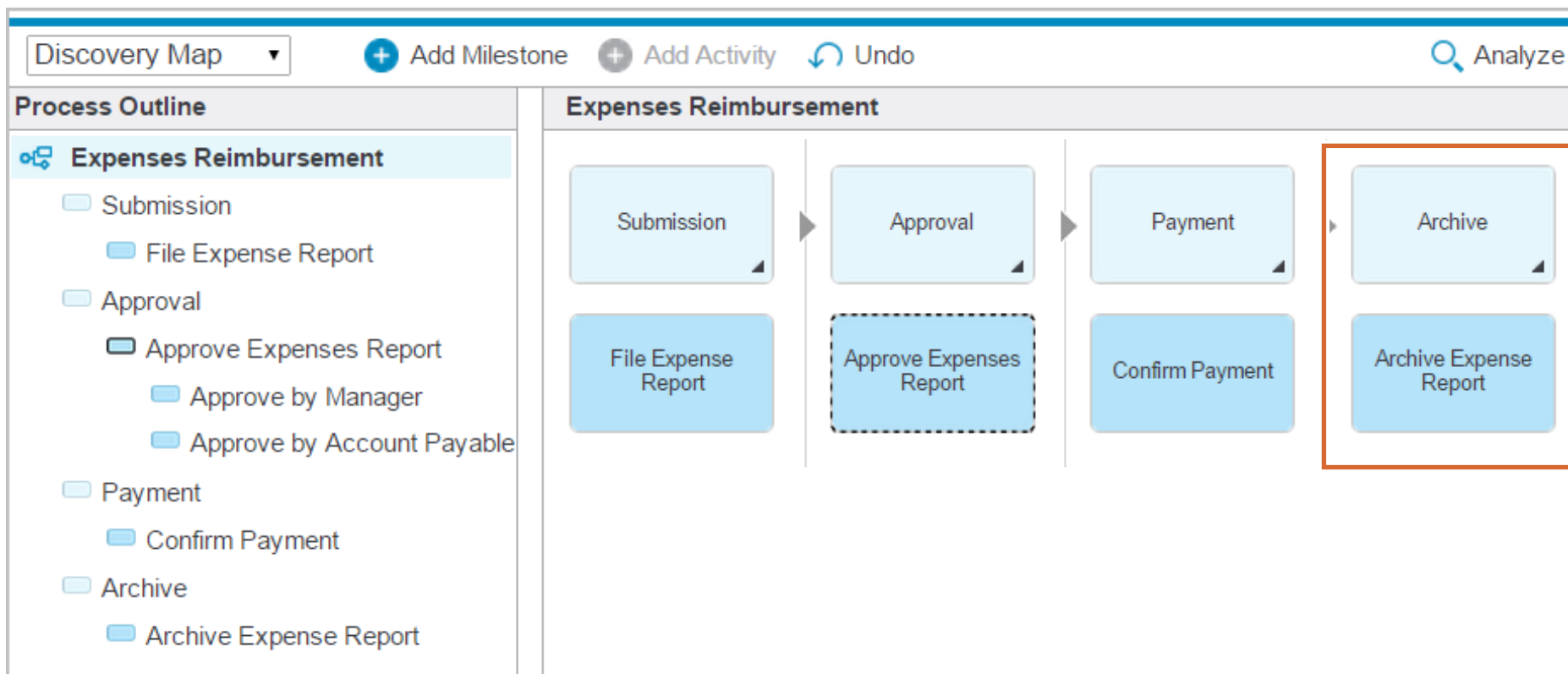
Yesterday

Autosnapshot	1:49 PM
BWL Admin	Actions

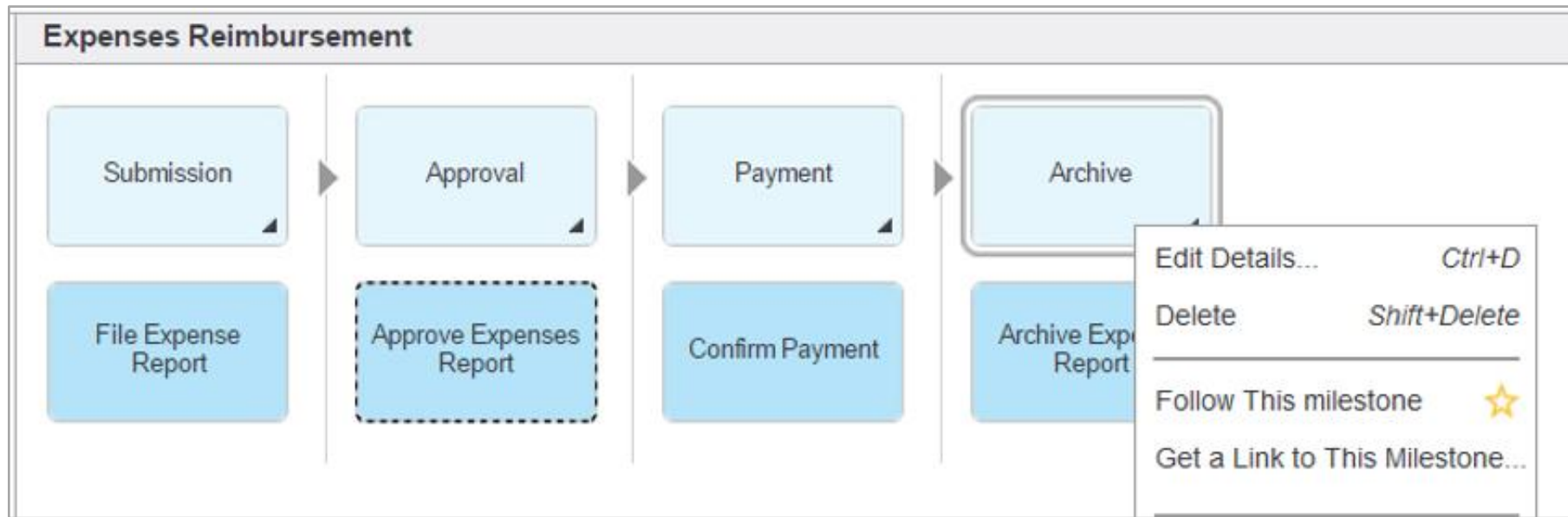
Modifying the discovery map (1 of 4)



Modifying the discovery map (2 of 4)



Modifying the discovery map (3 of 4)



Modifying the discovery map (4 of 4)


Discovery Map ▾

+ Add Milestone

+ Add Activity

↶ Undo

Process Outline

 **Expenses Reimbursement**

☐ Submission

- ☐ File Expense Report

☐ Approval

- ☒ Approve Expenses Report
 - ☐ Approve by Manager
 - ☐ Approve by Account Payable

☐ Payment

- ☐ Confirm Payment
- ☒ **Activity**

Expenses Reimbursement

Submission

File Expense Report

Approval

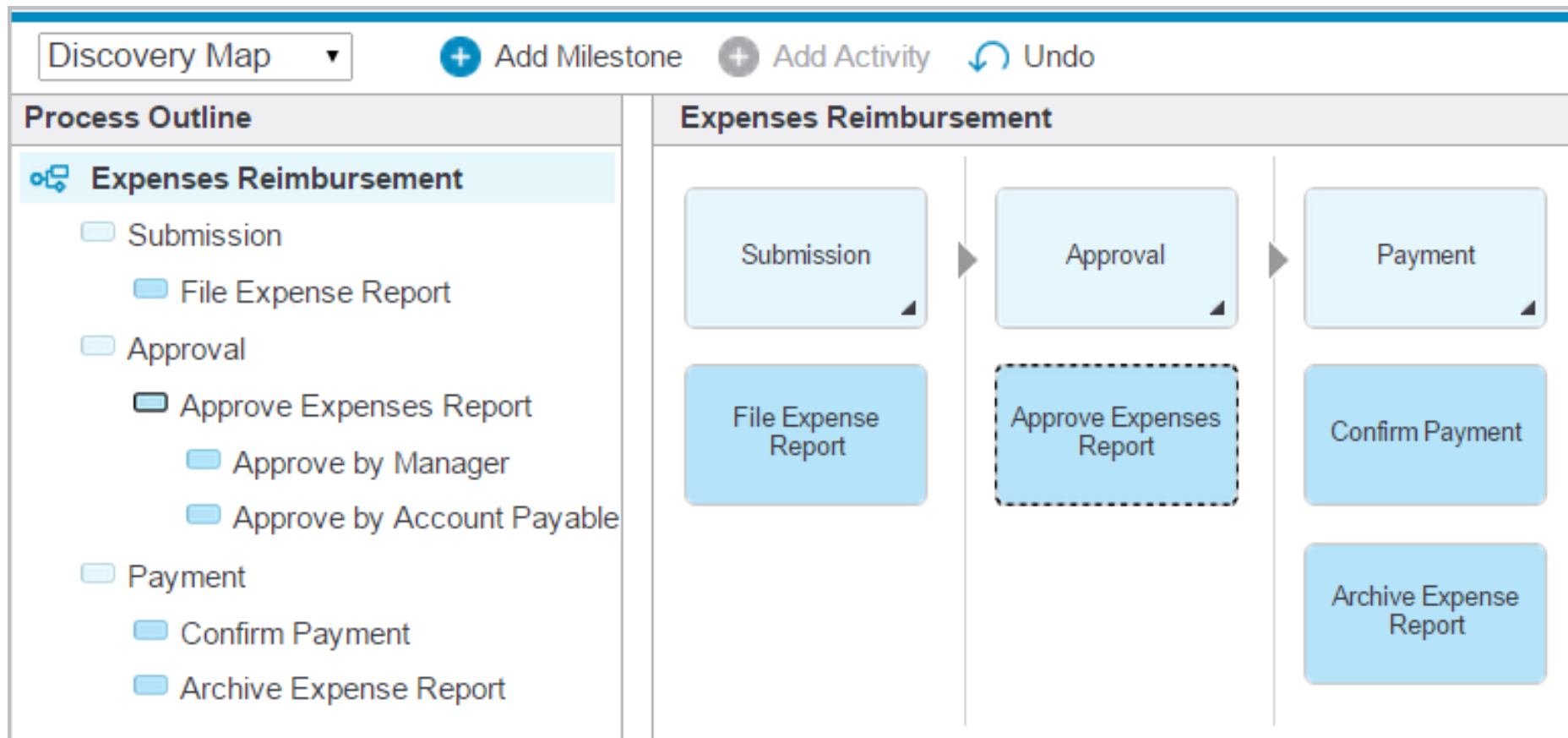
Approve Expenses Report

Payment

Confirm Payment

Activity

Discovery map final edit



Section recap

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

Exercise 2: Creating a Discovery Map

Exercise objectives

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

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



Capturing process details

Topics

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



Overview

Playback zero

Definition

1 - 3 weeks

Descriptive modeling

Analytical modeling

Validate

Discovery

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

As is model

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

Analysis

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

To be model

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

Final Playback

Adding details to a discovery map

The screenshot displays the IBM Process Discovery tool interface. At the top, there is a 'Discovery Map' dropdown menu, followed by buttons for '+ Add Milestone', '+ Add Activity', and 'Undo'. The main area is divided into two panels: 'Process Outline' on the left and 'Expenses Reimbursement' on the right.

Process Outline:

- ☐ Expenses Reimbursement
 - ☐ Submission
 - ☒ File Expense Report
 - ☐ Approval
 - ☒ Approve Expenses Report
 - ☒ Approve by Manager
 - ☒ Approve by Account Payable
 - ☐ Payment
 - ☒ Confirm Payment
 - ☒ Archive Expense Report

Expenses Reimbursement:

The process map shows a flow from 'Submission' to 'Approval' to 'Payment'. Below 'Submission' is a box for 'File Expense Report'. Below 'Approval' is a dashed box for 'Approve Expenses Report'. Below 'Payment' are boxes for 'Confirm Payment' and 'Archive Expense Report'. A context menu is open over the 'File Expense Report' box, showing options: 'Edit Details...' (highlighted with a red box and labeled 'Ctrl+D'), 'Delete' (labeled 'Shift+Delete'), 'Copy Activity', 'Follow This Activity' (with a star icon), 'Get a Link to This Activity...', 'Type' (with a dropdown arrow), 'Link to Process...', and 'Convert to Subprocess'. At the bottom of the menu are several colored circles.

Categories

File Expense Report ☆

Details

Problems

Policies

Documentation

Attachments

Comments

▼ Participant ?

☆

▼ Business Owners ?

☆

+

-

▼ Experts ?

☆

+

-

▼ Systems ?

☆

+

-

▼ Cycle Time ?

work time

Minutes ▼

+

wait time

Minutes ▼

Process participants

File Expense Report ☆

✕

Details Problems Policies Documentation Attachments Comments

▼ Participant ?

Employee

☆

▼ Business Owners ?

☆

+

-

▼ Experts ?

☆

+

-

▼ Systems ?

☆

+

-

Business owners

File Expense Report ☆

Details

Problems

Policies

Documentation

Attachments

Comments

▼ Participant ?

Employee

☆

▼ Business Owners ?

HR Manager

☆

+

-

▼ Experts ?

☆

+

-

▼ Systems ?

☆

+

-

Experts

File Expense Report ☆

Details Problems Policies Documentation Attachments Comments

▼ Participant ?

Employee

☆

▼ Business Owners ?

HR Manager

☆

+

-

▼ Experts ?

Jon Doe

☆

+

-

▼ Systems ?

☆

+

-

Inputs and Outputs

File Expense Report ☆

Details

Problems

Policies

Documentation

Attachments

Comments

▼ Suppliers ?

☆

+

-

▼ Inputs ?

Blank standardized expense report

☆

+

-

▼ Outputs ?

Completed expense report

☆

+

-

▼ Customers ?

☆

+

-

Playback zero - Process Discovery

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Adding all details

File Expense Report ☆

Details

Problems

Policies

Documentation

Attachments

Comments

Problems ?

📄

☆

Severity

Frequency

Low

Low

+

-

Playback zero - Process Discovery

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Section recap

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

Exercise 3: Capturing process details in a Discovery Map

Exercise objectives

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

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



Change to a process diagram

Topics

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



Overview

Playback zero

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1 - 3 weeks

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

Final Playback

From discovery map to a process diagram

The screenshot displays the IBM Process Discovery tool interface. On the left, a sidebar contains a dropdown menu with the following options: **Process Diagram** (selected and highlighted in blue), **Discovery Map**, **Process Diagram** (highlighted in blue), and **Documentation**. Below the dropdown, a list of process steps is shown with checkboxes: **Submission** (unchecked), **File Expense Report** (checked), **Approval** (unchecked), **Approve Expenses Report** (checked), **Approve by Manager** (checked), **Approve by Account Payable** (checked), **Payment** (unchecked), **Confirm Payment** (checked), and **Archive Expense Report** (checked).

The main workspace is titled **Expenses Reimbursement** and features a toolbar with **Add Milestone**, **Add Activity**, and **Undo** buttons. The process flow is visualized in three lanes separated by vertical lines:

- Submission Lane:** Contains a box labeled **Submission** and a box labeled **File Expense Report**.
- Approval Lane:** Contains a box labeled **Approval** and a dashed box labeled **Approve Expenses Report**.
- Payment Lane:** Contains a box labeled **Payment**, a box labeled **Confirm Payment**, and a box labeled **Archive Expense Report**.

Arrows indicate the flow from **Submission** to **Approval** to **Payment**. The **Approve Expenses Report** box is highlighted with a dashed border, indicating it is the current focus of the process diagram.

Create the process diagram

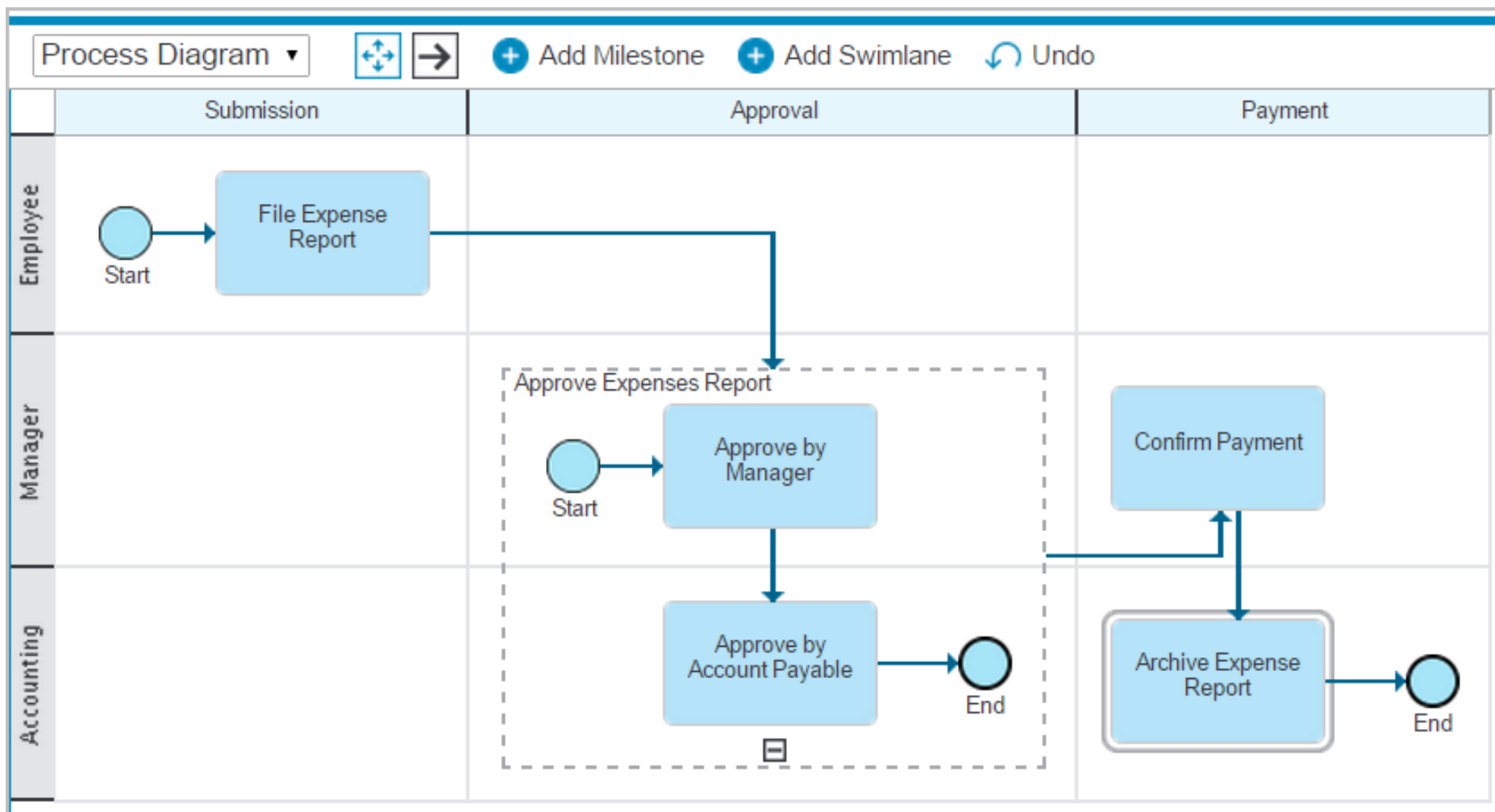
The screenshot displays the IBM Blueworks Live interface. On the left, the 'Process Outline' pane shows a tree structure for 'Expenses Reimbursement' with sub-items: Submission (File Expense Report), Approval (Approve Expenses Report, Approve by Manager, Approve by Account Payable), and Payment (Confirm Payment, Archive Expense Report). The main workspace, titled 'Expenses Reimbursement', shows a process diagram with three sequential steps: 'Submission', 'Approval', and 'Payment', connected by arrows. A blue dialog box titled 'Create Process Diagram' is overlaid on the workspace. The dialog contains the following text:

Blueworks Live automatically creates a process diagram using the information entered on the map view. Workflow items such as decisions and events added in the diagram **will not** be displayed in the map view.

It's recommended that you add the diagram after you have defined the process milestones and activities in the map view.

A 'Create Diagram' button is located at the bottom right of the dialog.

The initial process diagram



Unit summary

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



Review questions



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

Review answers



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

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

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

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

The answer is A.

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

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

The answer is C.