

The foundation for Process Modeling

Unit objectives

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



Business process management (BPM)

Topics

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



What is business process management (BPM)?



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

Three themes

Goal

The BPM goal is efficient and effective business processes with visibility.

System

The BPM system is the management of people-to-people work steps, system-to-system communications, or person-to-system interactions.

Results

The BPM expected result is process improvement that brings about financial benefits and customer and employee satisfaction.

A BPM vision

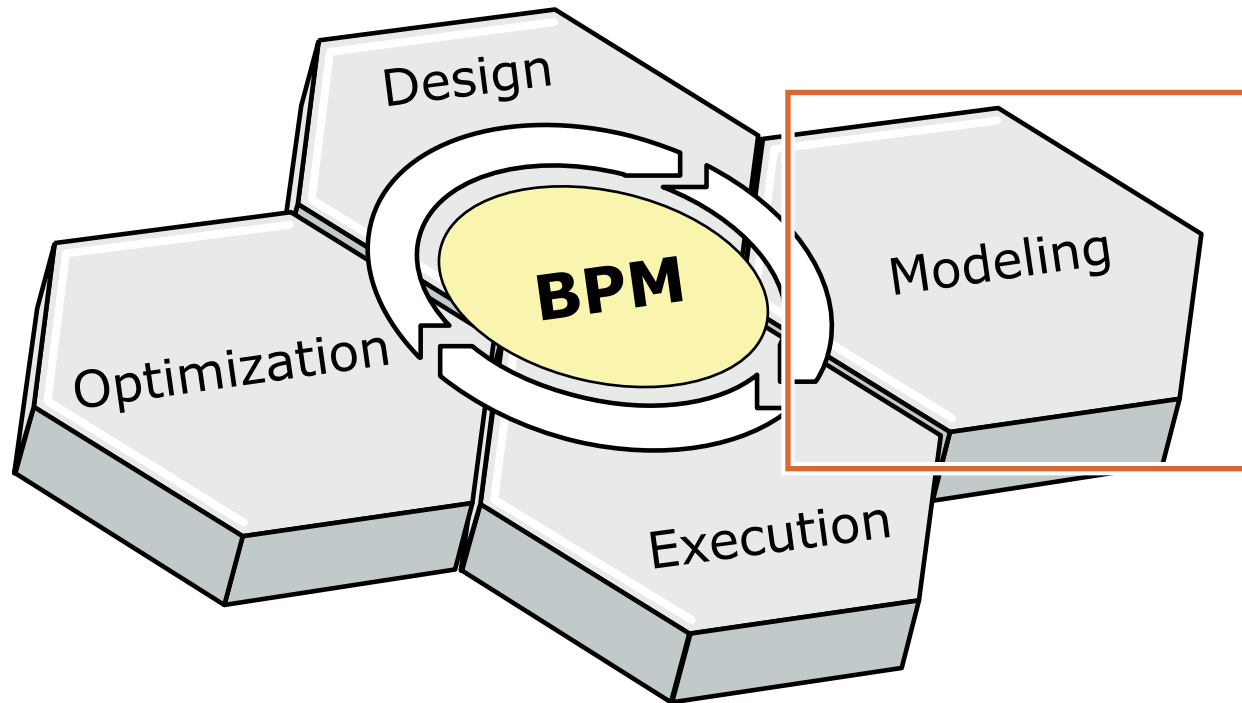


BPM is the means by which companies and governments improve their operations by using internal business expertise in new, scalable ways.

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

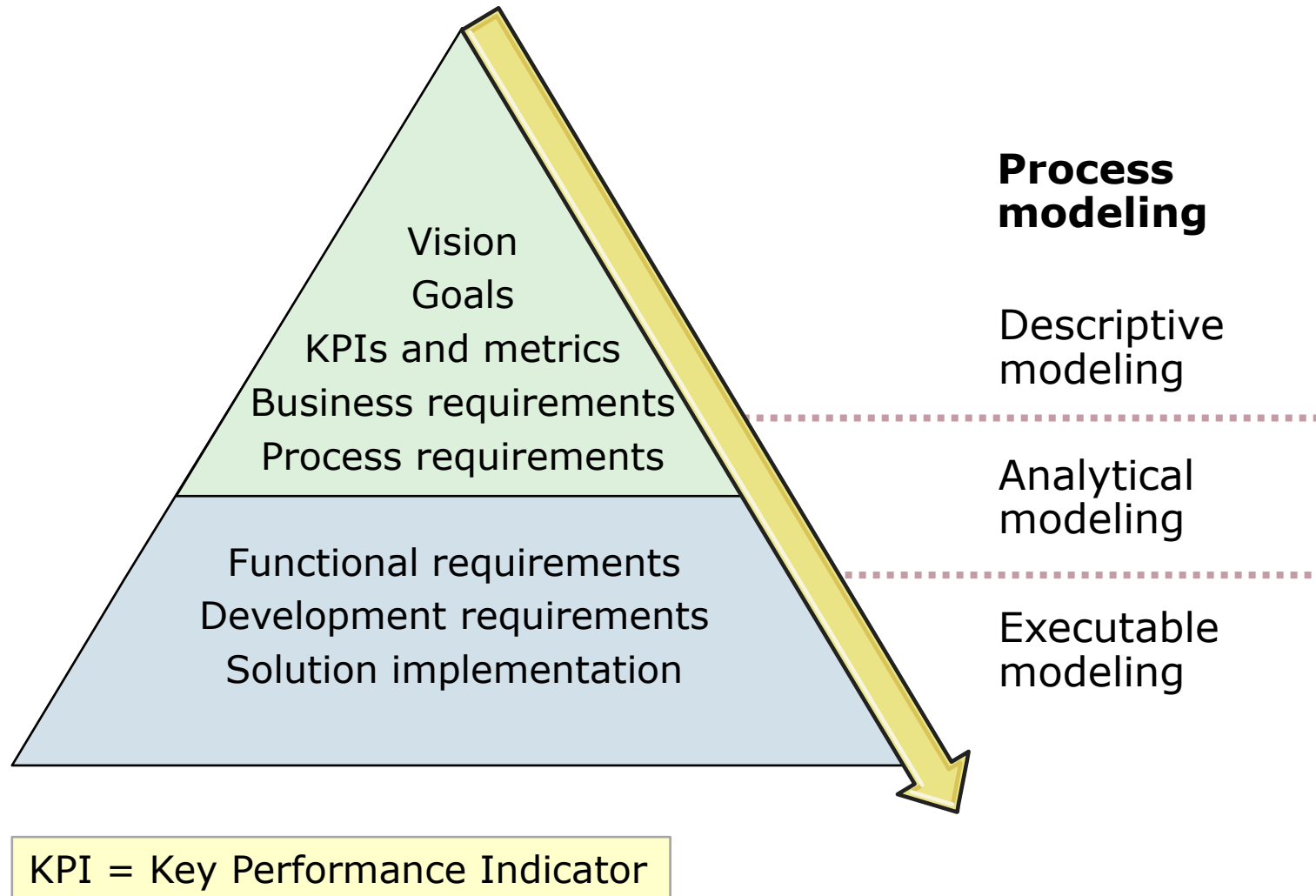


The modeling phase



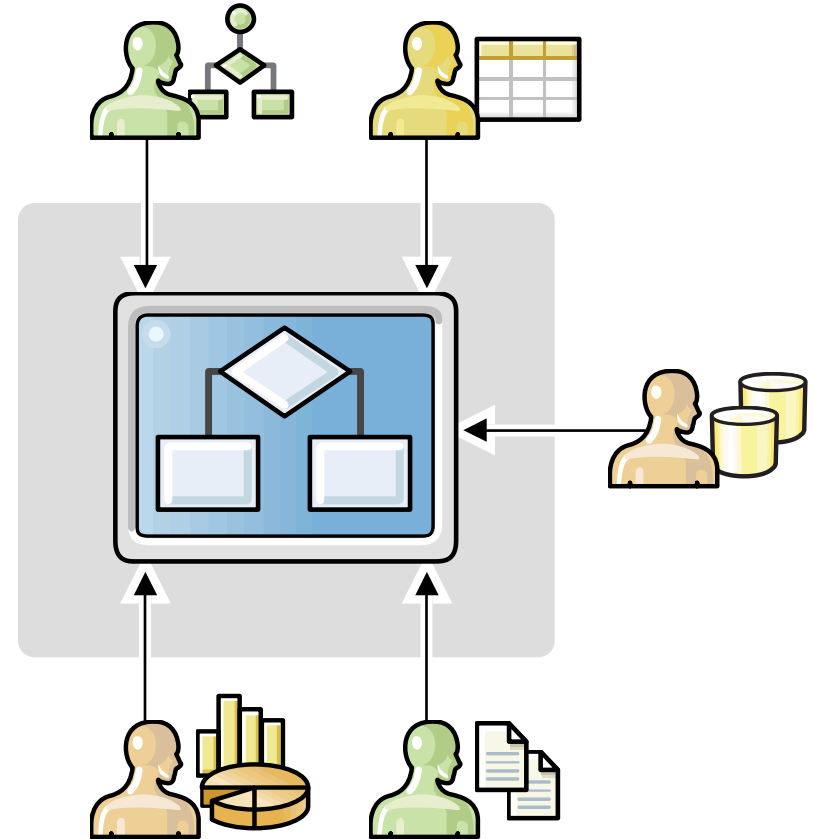
- Process discovery and documentation
- Process analysis
- Simulation and adjustment

BPM modeling goals



BPM project teams

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



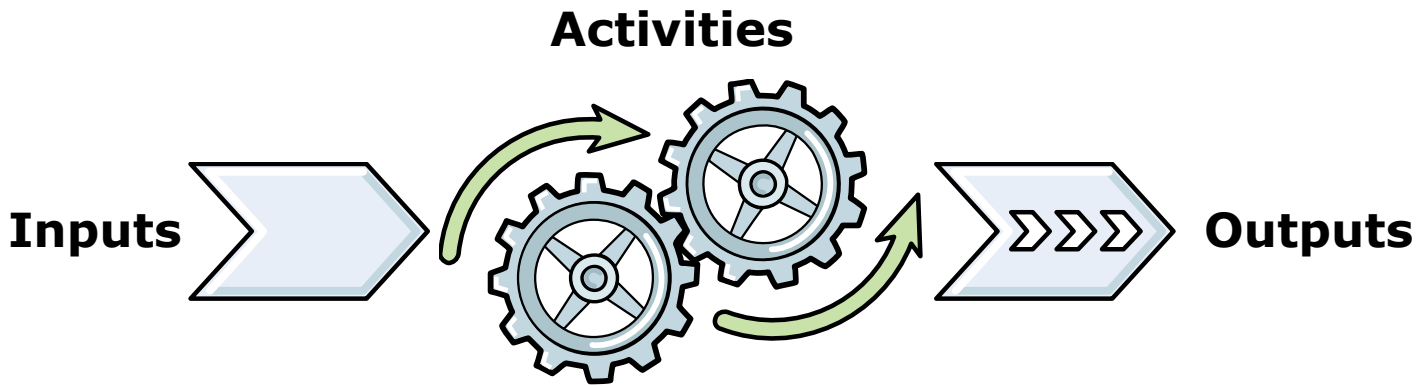
Process modeling

Topics

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

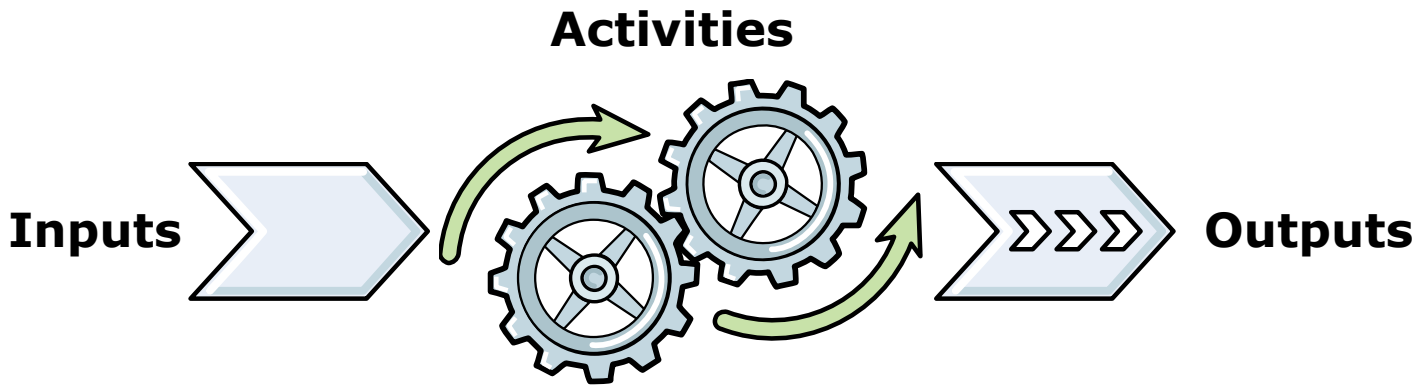


What is a business process?



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

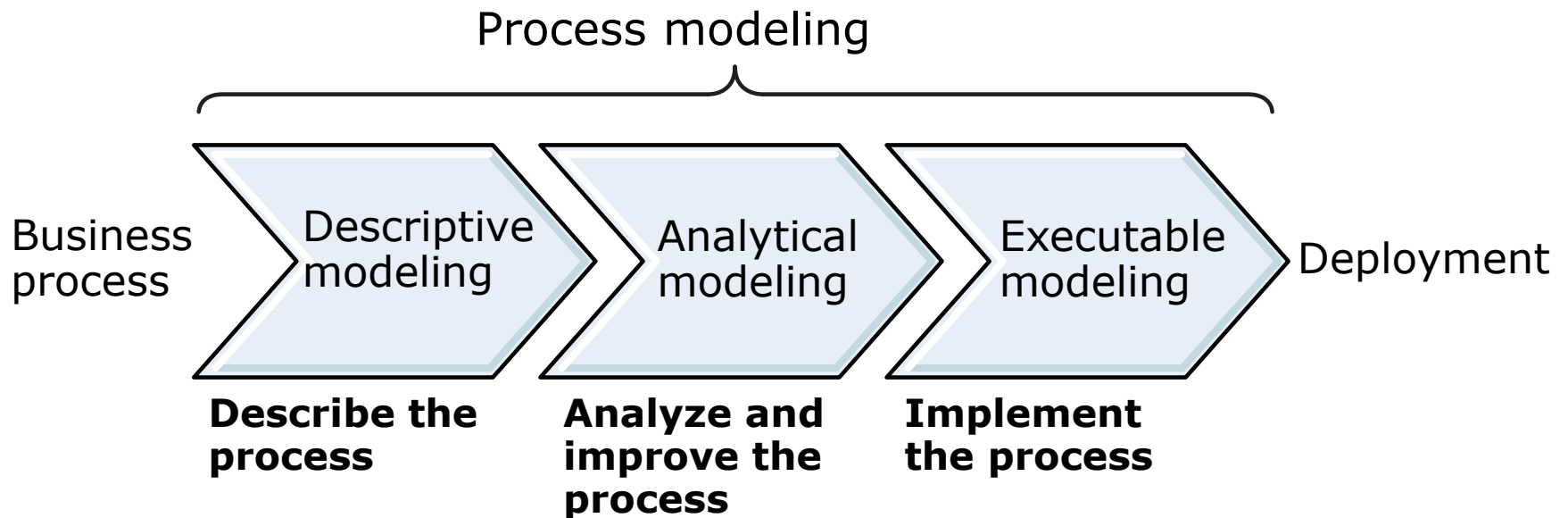
What is process modeling?



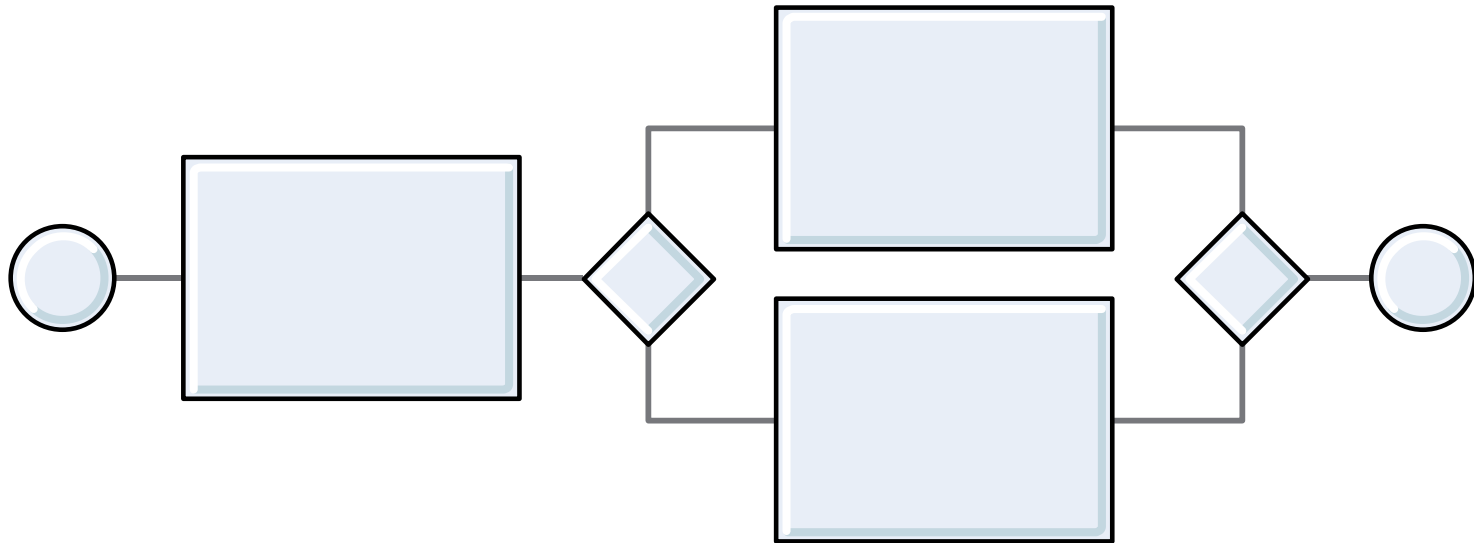
Captured in process modeling

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

Three-phase approach

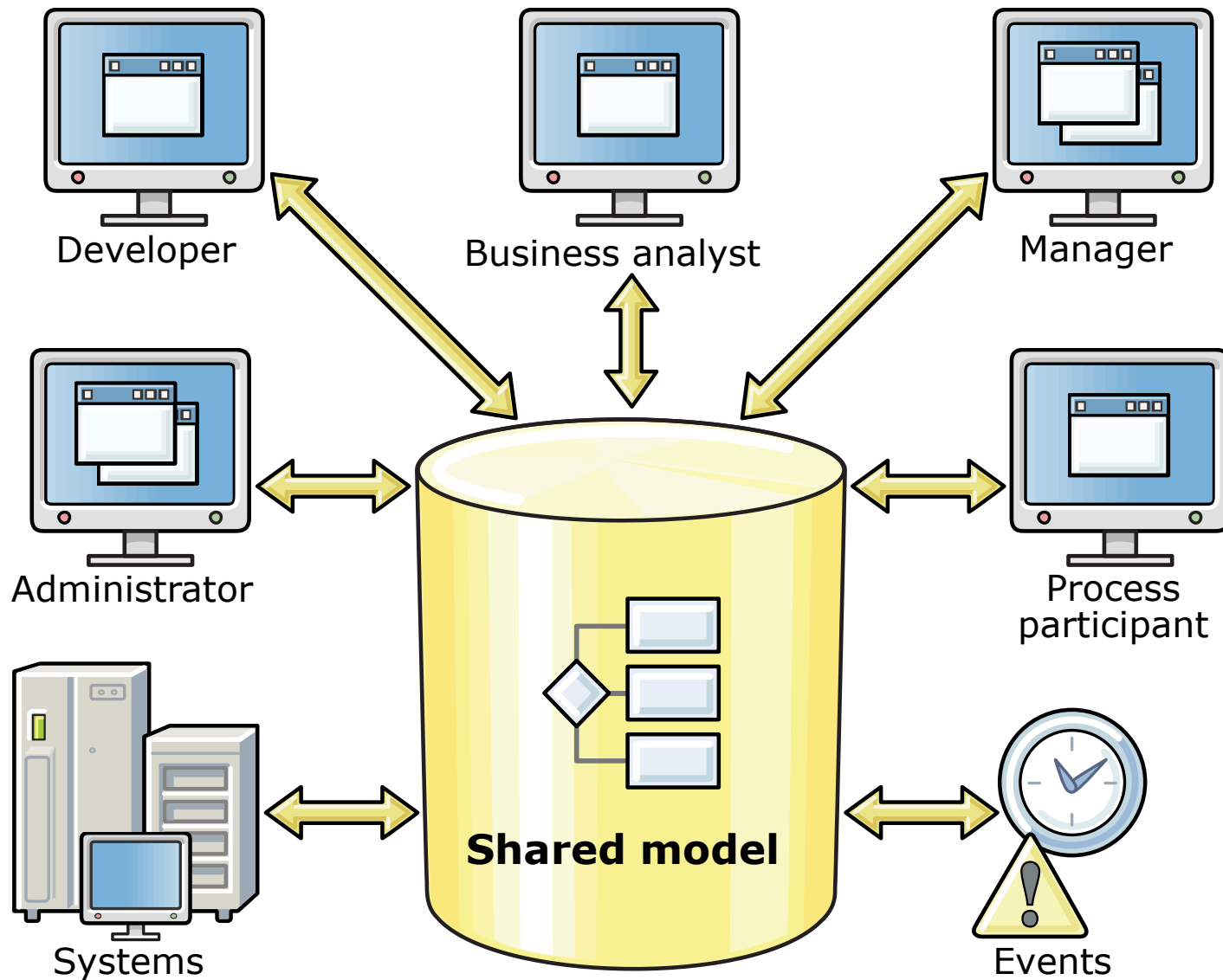


What is a process model?



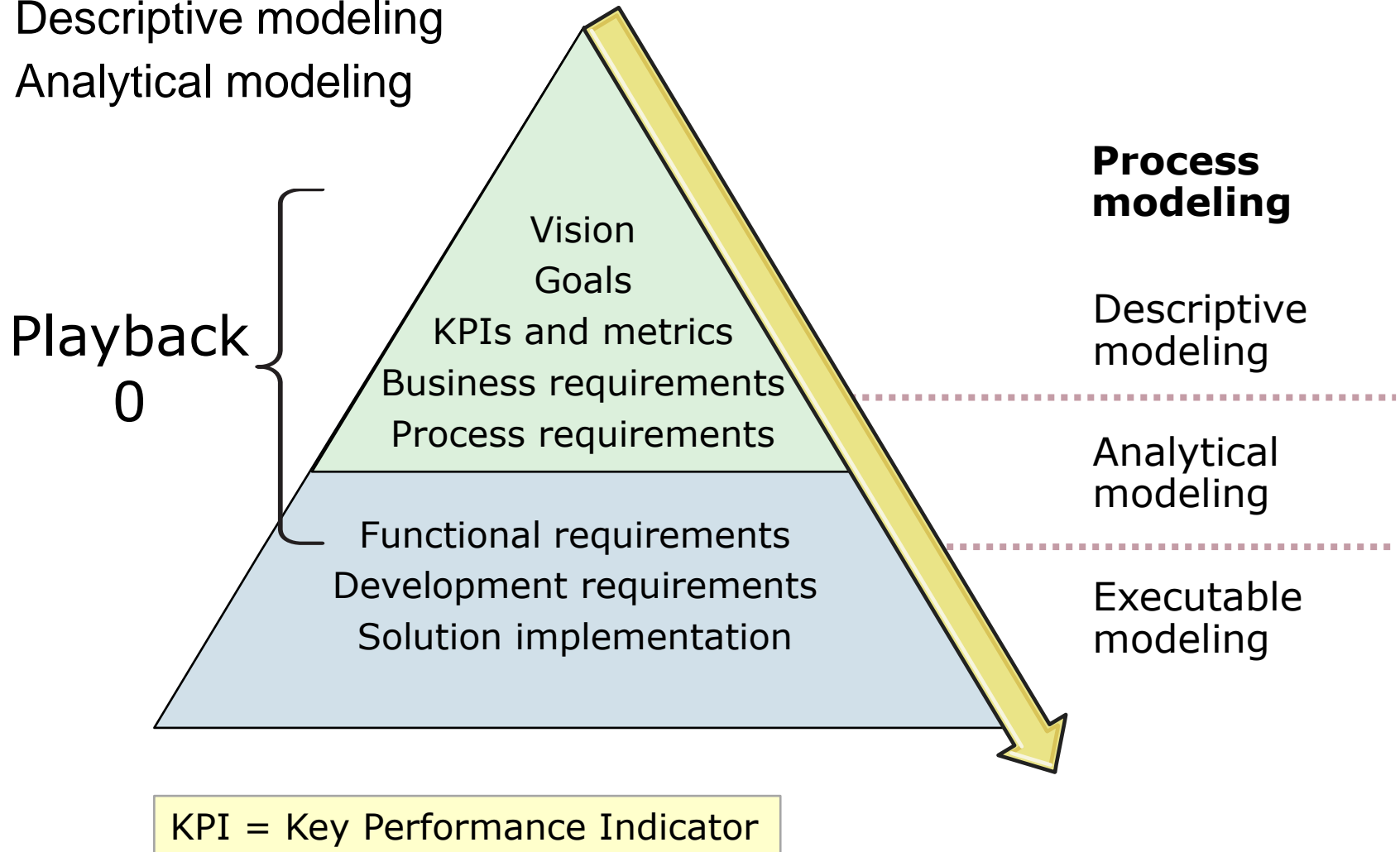
A graphical representation, or diagram, of the business process that is universally understood and easily communicated.

The right process model development strategy

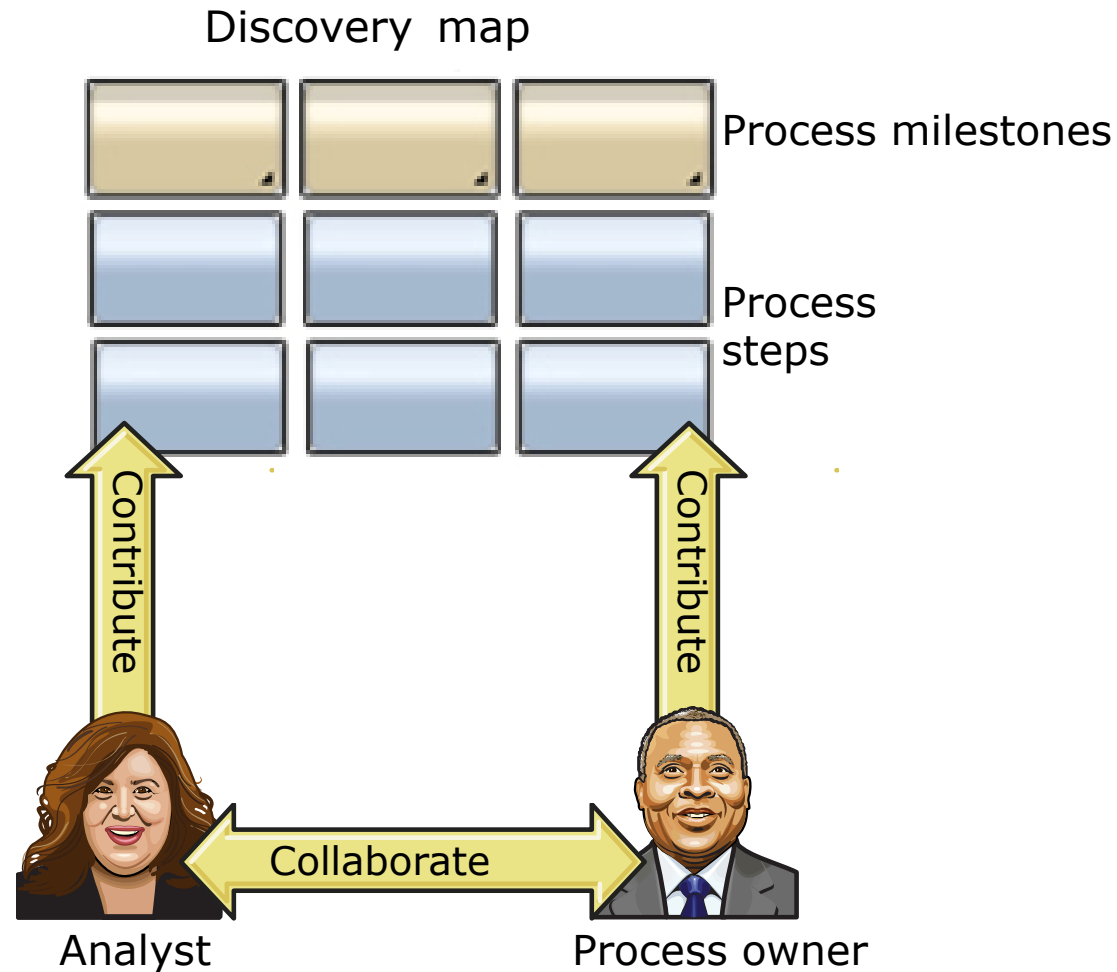


Playback 0

- Descriptive modeling
- Analytical modeling



Playback 0: Process discovery (1 of 2)



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

Playback 0: Process discovery (2 of 2)

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

Introducing IBM Blueworks Live

Topics

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



IBM Blueworks Live overview



The banner features a dark blue header with the 'BlueworksLive' logo on the left and a 'Log in' button on the right. The main background is a chalkboard with a complex flowchart drawn in white chalk. The flowchart includes various process symbols: rectangles for tasks, diamonds for decision points, and circles for start/end points, connected by arrows. A woman with long brown hair and glasses, wearing a light blue button-down shirt, stands on the right side of the chalkboard, smiling and pointing her right index finger towards the central text box. On the left side of the banner, there is a vertical grey bar with the text 'Weekly Demo' written vertically. The central text box is blue with white text. Below the main headline, there is a smaller line of text and an orange button. At the bottom of the banner, there is a dark grey section containing a white icon of a computer monitor with a pencil, followed by a large headline, a sub-headline, and a link with a small icon.

BlueworksLive

Log in

Weekly Demo

Process made simple

Get rid of sticky notes and generic drawing software and see what an easy-to-use process modeling tool can do for your business.

Try it now!



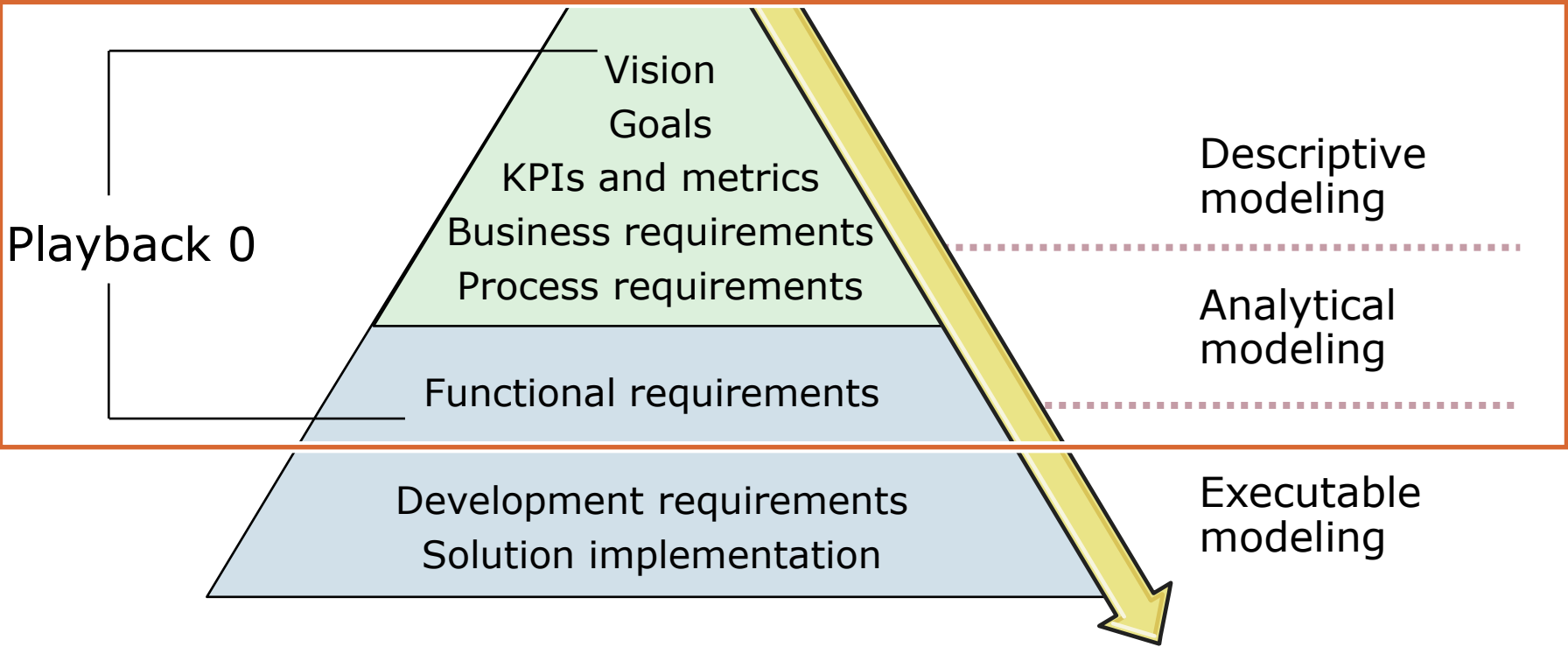
Model and improve your business processes

Capture process knowledge. Drive out inefficiencies and improve business operations.

[Learn more](#)

Playback 0

BlueworksLive



IBM Blueworks Live essentials

BlueworksLive

Email

Password

☐ Remember my email [Log In](#)

[New to Blueworks Live?
Learn more](#)[Trouble logging in?
Find help here](#)[Don't have an account?
Sign up now](#)

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Latest news...

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

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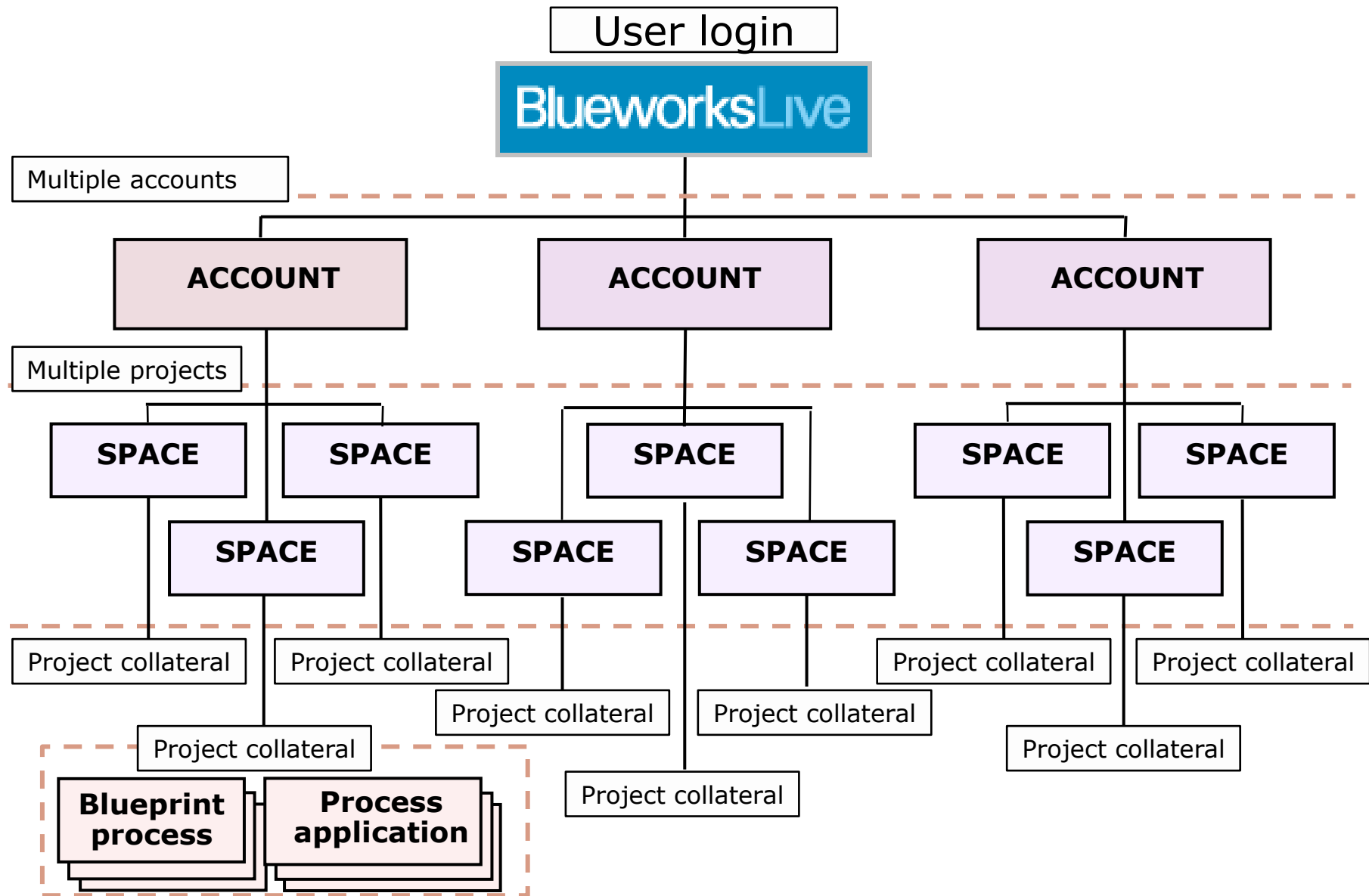
[The February 2015 release](#) is here with diagramming productivity and layout enhancements, Help link for Viewers, and filtering on the User Management page of the Admin console.

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

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

[The April 2014 release](#) is here with Publishing and Integrated Governance of Blueprints and Decisions.

IBM Blueworks Live account structure



Blueworks Live account administration

BlueworksLive

Email

MyEmail@email.com

Password

.....

Account


☐ Remember my email

Log In

New to Blueworks Live?
Learn more

Trouble logging in?
Find help here

Don't have an account?
Sign up now

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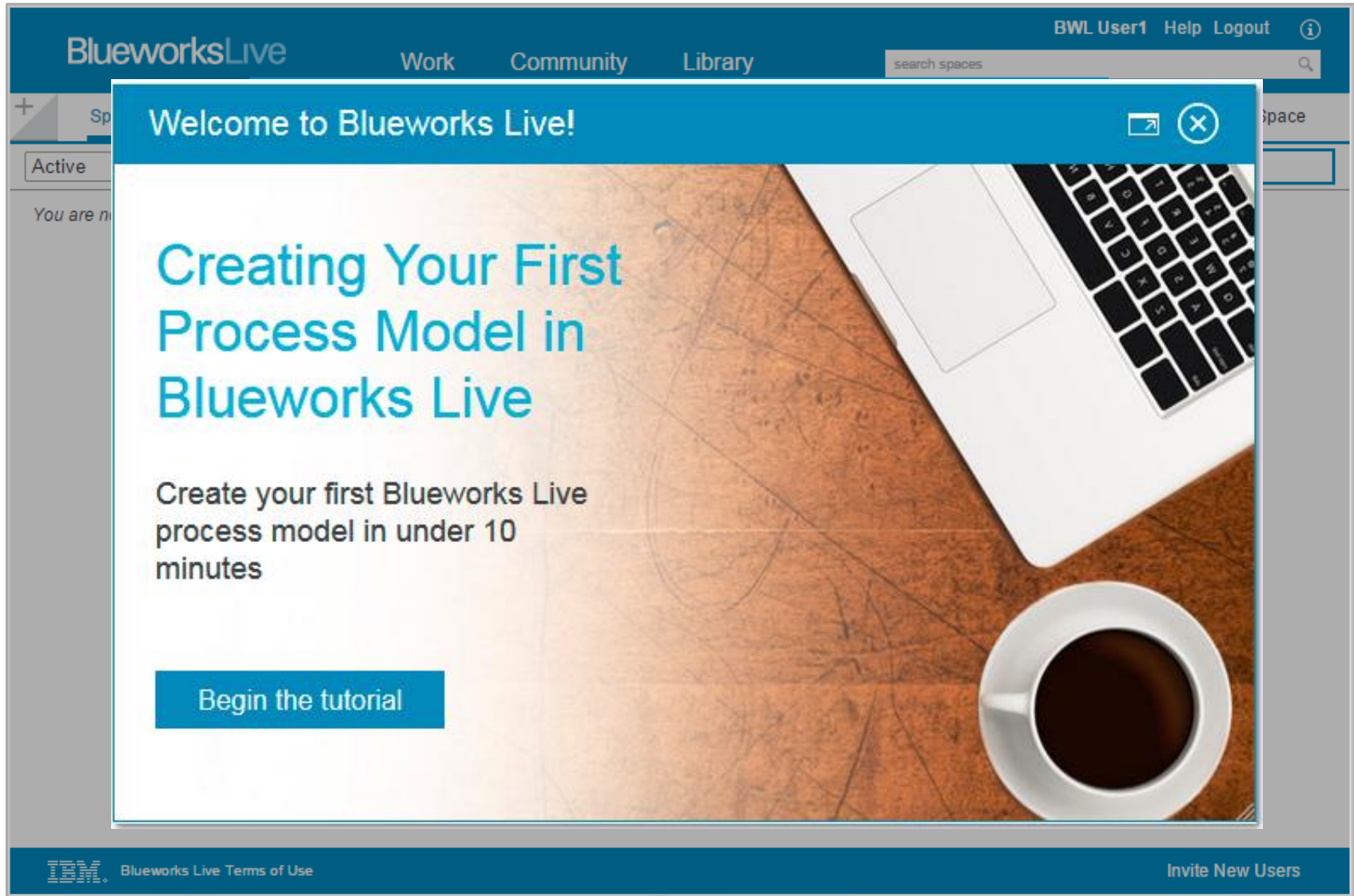
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Blueworks Live account interface



Work

BlueworksLive

Work

Community

Library

BWL Admin 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

You have no tasks due this week.

▼ Tasks Due Later

0

You have no tasks due later.

▼ No Due Date

0

You have no tasks with no due date.

LAUNCH A PROCESS

Filter

Create a Checklist

Submit Document for Review

Submit Process for Review

Blueprint a process

The image shows the BlueworksLive interface with a modal dialog box titled "Blueprint a Process". The dialog box contains the following elements:

- Header:** "Blueprint a Process" with a close button (X).
- Instruction:** "Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain."
- Form:** A text input field for "Process Name".
- Help:** A question mark icon followed by the text: "By default, you will automatically follow all processes you create. You can change this in your user settings panel."
- Instruction:** "Next, select a space to place this process in."
- Form:** A dropdown menu for "Space Name" with the placeholder text "Choose a space...".
- Instruction:** "Select **Create** to start blueprinting your process."
- Button:** A blue "Create" button at the bottom right.

The background interface shows the "Processes" tab selected in the "Library" section. The "Blueprint a Process" button is highlighted with a red box, and a dashed arrow points from this box to the dialog box.

Automate a process

BWL Admin Admin Help Logout

+

Automate a Process

Automate a Process


Automation allows you to create a simple process app that can be launched by users to perform work items.

Process App Name

By default, you will automatically follow all processes you create. You can change this in your user settings panel.

Next, choose the type of process automation you want to create

Workflow



Allows you to define a sequence of tasks and approval steps that can be assigned to a set of users.

Next, select a space to place this process in.

Space Name

Choose a space...

Select Create to start configuring your process app.

Create

Community

BlueworksLive

Work

Community

Library

BWL Admin Admin Help Logout

search

All Activity

Followed Items ★

Posts

QUICK LINKS

Processes

Decisions

Policies

Spaces

My Tasks

PRIVATE ACTIVITY STREAM

Date

User

Process

Space

+ New Post

Expand All | Collapse All

▼ Yesterday

BWL User2 made 55 changes to ★ Hiring Requisition process in Training Space space 10:04 PM

+

made 2 changes to ★ Hiring Requisition process in Training Space space 6:29 PM

+

made 1 change to ★ Establish Compensation Package Decision decision in Process Examples space 1:57 PM

+

You made 2 changes to ★ Establish Compensation Package Decision decision in Process Examples space 11:51 AM

+

made 5 changes to ★ Hiring Requisition process in Training Space space 10:45 AM

+

made 9 changes to ★ Hiring Requisition process in Training Space space 9:58 AM

+

BWL User2 made 29 changes to ★ Hiring Requisition process in Training Space space 1:20 AM

+

PUBLIC BPM STREAM

There are no public messages to display.

The foundation for Process Modeling

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Library

BlueworksLive

WorkCommunityLibrary

User 1AdminHelpLogout

search spaces

+

SpacesProcessesDecisionsPoliciesUser GroupsGlossaryBlogsTemplates

Create New Space

Active

Spaces (2)

★

NameDateTag

Filter

Blueworks Live Training

▼

★

Last modified by User 1 on 24-Dec-2015

Training Space

▼

★

Last modified by User 1 on 18-Jan-2016

education

training

IBM. Blueworks Live Terms of Use

Invite New Users

Create a space in the account

The screenshot shows the BlueworksLive user interface. At the top, there is a navigation bar with the BlueworksLive logo and links for Work, Community, and Library. A search bar labeled 'search spaces' is also present. Below the navigation bar, a secondary bar contains various tabs: Spaces, Processes, Decisions, Policies, User Groups, Glossary, Blogs, and Templates. A red box highlights a '+ Create New Space' button in the top right corner. The main content area shows a list of spaces, with 'Training Space' selected. A modal dialog titled 'Create a New Space' is open in the foreground. The dialog has a blue header with a close button (X). The main content of the dialog asks 'What would you like to call the space you are creating?' and includes a text input field labeled 'Space Name'. Below this, it asks 'Where to add this new space' and features a dropdown menu currently set to 'Top of library'. A 'Create Space' button is located at the bottom right of the dialog.

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

Space details

BlueworksLive

WorkCommunityLibrary

User 1AdminHelpLogout

search

All Spaces >

Training Space

educationtraining

Edit Tags

Export Space

OverviewUsersStats

Space Details

ACTIVITY STREAM

DateUserNew Post

Older

Filter

Create New

Import

Active

Items (5)

Type

Name

Date

Tag

Process Blueprints 3

Claims Payment

Last modified by User 1 on 30-Jan-2016

Hiring Requisition

Last modified by User 1 on 25-Jan-2016

hr department

IBM

Blueworks Live Terms of Use

Invite New Users

Space users

All Spaces >

Training Space

★ ⓘ

education

training

Edit Tags

Export Space

Overview













Users

Stats

This list defines the people and roles that can participate in this space and with the items it contains. You can further control the permissions for each user by selecting the appropriate check boxes.

PARTICIPANTS

+ Add

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

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

The screenshot displays the IBM Training Space interface. At the top, the 'Training Space' is selected, with tags for 'education' and 'training'. Below this, there are tabs for 'Overview', 'Users', and 'Stats'. The 'Overview' tab is active, showing 'Space Details' and an 'ACTIVITY STREAM'. The activity stream shows a post from 'Yesterday' stating 'You made 9 changes to ★ Hiring Requisition process' at 9:58 AM. On the right side, there is a 'Filter' section with a search bar and a 'Create New' dropdown menu. The 'Create New' menu is open, showing options for 'Space', 'Process Blueprint', and 'Process App'. The 'Process Blueprint' option is highlighted with a red box. Below the menu, there is a list of 'Process Blueprints' with a 'Hiring' process listed, last modified by 'hr department'. A tooltip is visible over the 'Hiring' process, stating: 'Easily discover and document your processes using collaborative tools, including discovery maps and process diagrams.'

All Spaces > **Training Space** ★ ⓘ

education training Edit Tags

Overview Users Stats

► **Space Details**

ACTIVITY STREAM Date User + New Post ⋮ ★ 💬

▼ Yesterday

You made 9 changes to ★ Hiring Requisition process +
9:58 AM

Filter **Create New** ▼

Active ▼ Items Space **Process Blueprint** Process App

▼ Process Blueprints

Hiring Last mod hr department

Easily discover and document your processes using collaborative tools, including discovery maps and process diagrams.

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

The screenshot displays the BlueworksLive web application interface. At the top, the navigation bar includes 'BlueworksLive', 'Work', 'Community', 'Library', and a search bar. The user is logged in as 'User 1'. The main content area shows the 'Training Space' with tabs for 'education' and 'training'. A modal dialog titled 'Blueprint a Process' is open, prompting the user to 'Select a name for your new process'. The 'Process Name' field contains 'Expenses Reimbursement'. Below the field, it says 'Select Create to start blueprinting your process.' and a 'Create' button is visible. The background interface includes an 'Overview' tab, 'Space Details', and an 'ACTIVITY STREAM'.

BlueworksLive

User 1 Admin Help Logout

Work Community Library search

All Spaces > Training Space

education training

Export Space

Overview Users Sta

Space Details

ACTIVITY STREAM

Older

Blueprint a Process

Select a name for your new process. We suggest a name that describes the overall process or the types of activities that it will contain.

Process Name

Expenses Reimbursement

Select Create to start blueprinting your process.

Create

Hiring Requisition Last modified by User 1 on 25-Jan-2016 hr department

Blueprint process

The screenshot displays the BlueworksLive interface for editing a process blueprint. The top navigation bar includes the BlueworksLive logo, tabs for Work, Community, and Library, and a search bar. The user is logged in as 'BWL Admin'. The current workspace is 'Training Space > Expenses Reimbursement', which is marked as a favorite. Tools for 'Add Tags', 'Snapshots', and 'End Edit' are available. The main toolbar contains options for 'Discovery Map', 'Add Milestone', 'Add Activity', 'Undo', 'Analyze', 'Show Color Legend', and a 'Zoom' slider. The interface is split into two panels: 'Process Outline' on the left and 'Expenses Reimbursement' on the right. The 'Process Outline' shows a tree structure with 'Expenses Reimbursement' expanded, containing 'Milestone 1', 'Activity', and 'Milestone 2'. The 'Expenses Reimbursement' panel shows a visual flow diagram with 'Milestone 1' and 'Milestone 2' connected by a right-pointing arrow, and an 'Activity' box positioned below 'Milestone 1'. An orange rectangular box highlights the diagram area.

BlueworksLive

Work Community Library

BWL Admin Admin Help Logout

search

Training Space > Expenses Reimbursement

+ Add Tags

Snapshots End Edit

Discovery Map

+ Add Milestone + Add Activity Undo Analyze Show Color Legend Zoom

Process Outline

Expenses Reimbursement

- Expenses Reimbursement
 - Milestone 1
 - Activity
 - Milestone 2

Expenses Reimbursement


Milestone 1 Milestone 2




Activity


View or Action for this process


The screenshot displays the BlueworksLive interface. At the top, the navigation bar includes 'BlueworksLive', 'Work', 'Community', and 'Library' with a search bar. Below this, the breadcrumb 'Training Space > Expenses Reimbursement' is shown, along with a star icon and an information icon. A '+ Add Tags' button is also present. On the left, a 'Discovery Map' dropdown is set to 'Discovery Map', and a 'Process Outline' section lists 'Expenses Reimbursement' with sub-items 'Milestone 1' and 'Milestone 2'. A dropdown menu is open over the 'Expenses Reimbursement' item, listing the following actions: 'View Work History', 'View Process Summary', 'Where Used', 'Manage Space Participants', 'Get a Link to This Process', 'Print PDF', 'Copy Process', 'Export to Word', 'Export to PowerPoint', and 'Export Process'. On the right, an 'Undo' button and an 'Analyze' button are visible, along with a 'Milestone 2' label.


Snapshot





Training Sp... > Expenses Reimbursement   

 + Add Tags

 Snapshots

 End Edit

 Snapshots

 End Edit

Snapshots

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

Snapshot


☐ Hide System Snapshots

Today

Current Version

BWL Admin

Now

[Actions](#) 

Analyze

Training Space > Expenses Reimbursement

+ Add Tags

You are viewing the Analysis Mode. Click the "X" or Analyze button to return to the process view.

BlueworksLive Work Community Lib search

BWL Admin Admin Help Logout

Training Space > Hiring Requisition

hr department

Parti... Expand All | Collapse All

Participants 9

- Participant # Occurrences
- ☒ System 4
 - Determine position type
 - Notify hiring manager
 - Post to system database
 - Review for salary compliance
- ☒ Hiring Manager 2
 - Create hiring request
 - Negotiate salary
- ☒ HR Administrator 2
 - Activity
 - Review for salary

Discovery Map Process Diagram

Submission Approval Completion

Hiring Manager

Start

Create hiring request

Analysis Mode

HR Administrator

Activity

General Manager

Validate hiring request

System

Determine position type

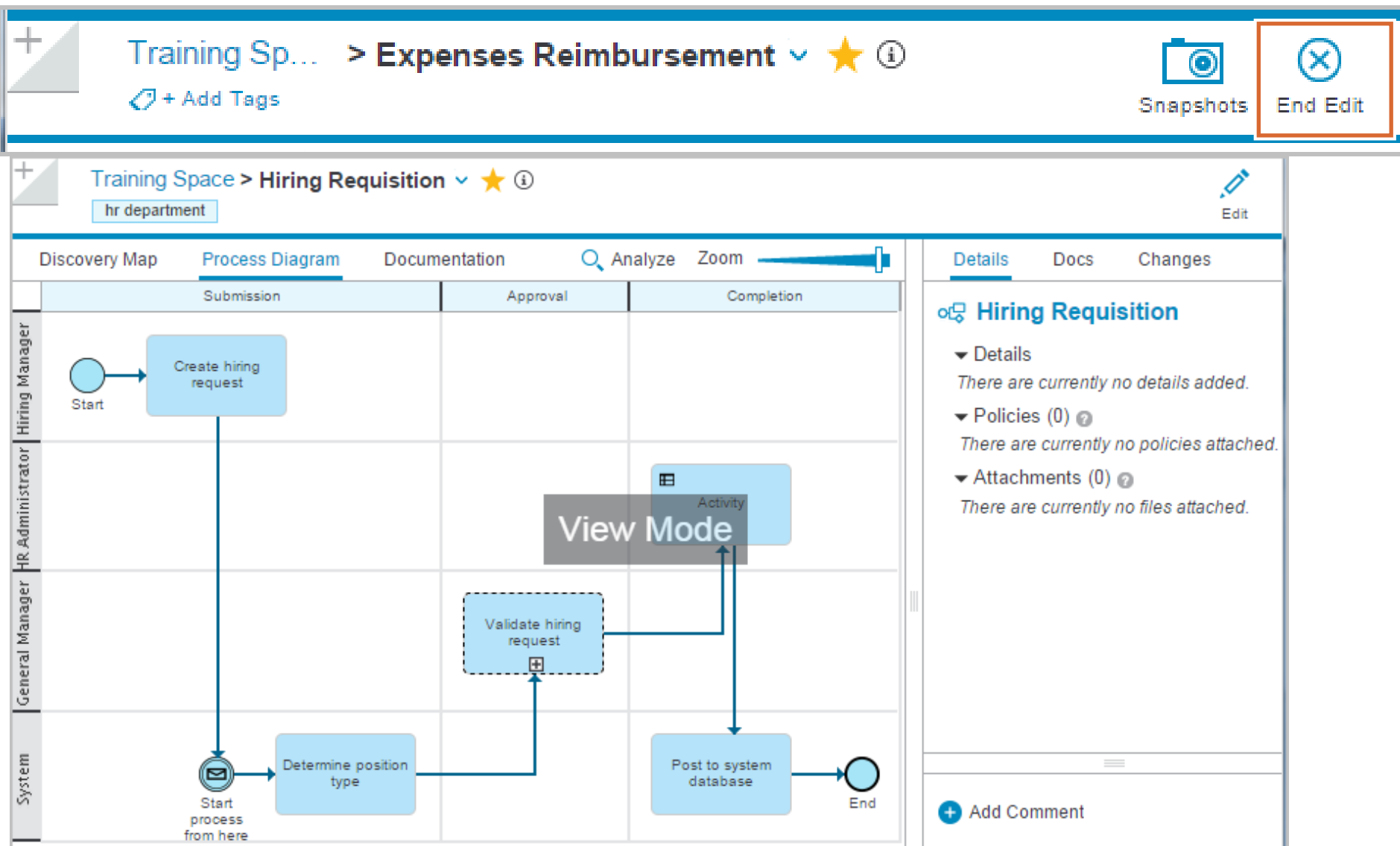
Start process

Post to system database

Zoom

Analyze

End Edit (1 of 2)




End Edit (2 of 2)

BWL Admin Admin Help Logout

search

Edit

Details Docs Changes

 **Hiring Requisition**

▼ Details

There are currently no details added.

▼ Policies (0) ?

There are currently no policies attached.

▼ Attachments (0) ?

There are currently no files attached.

+ Add Comment

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

Exercise objective

After completing this exercise, you should be able to:

- Create an IBM Blueworks Live space and blueprint project



Unit summary

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



Review questions



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

Review answers



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