Playback zero - Process Discovery

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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

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About process discovery

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Topics

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

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Overview

Playback zero

Definition
1 - 3 weeks

Descriptive modeling → **Analytical modeling** → **Validate**

Discovery	As is model	Analysis	To be model	Final Playback
•Process goals •Critical success factors •Scoping •Process capture and documentation	•Current state model in various formats •Captured information: RACI, SIPOC, and pain points	•Refine the current state process model •Added value analysis •Root cause analysis •Opportunity prioritization •Process simulation	•Business data •KPI and metrics •Business case with estimated potential value and impact •Scope and effort assessment •Process model diagram (BPMN)	

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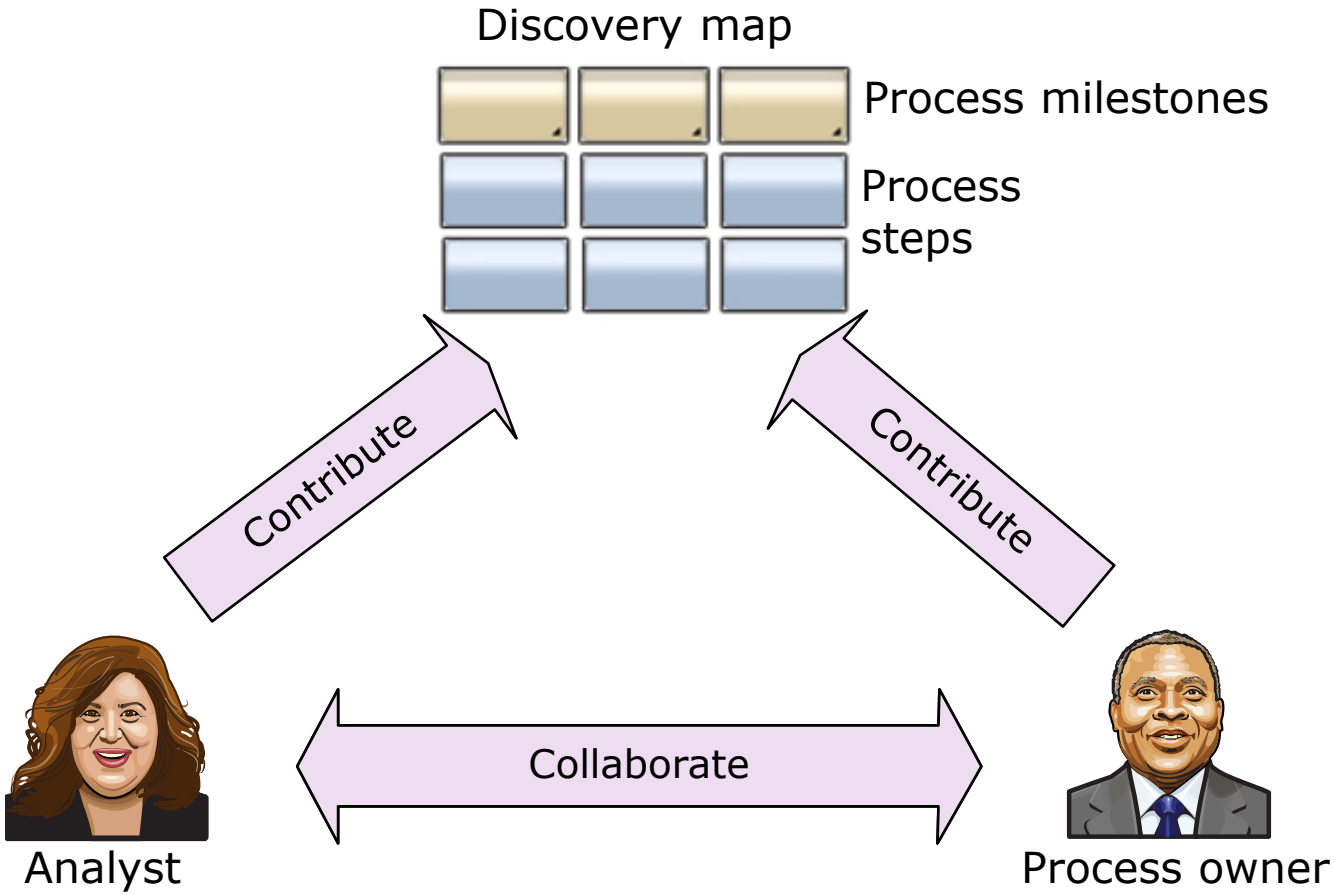
Collaboration



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

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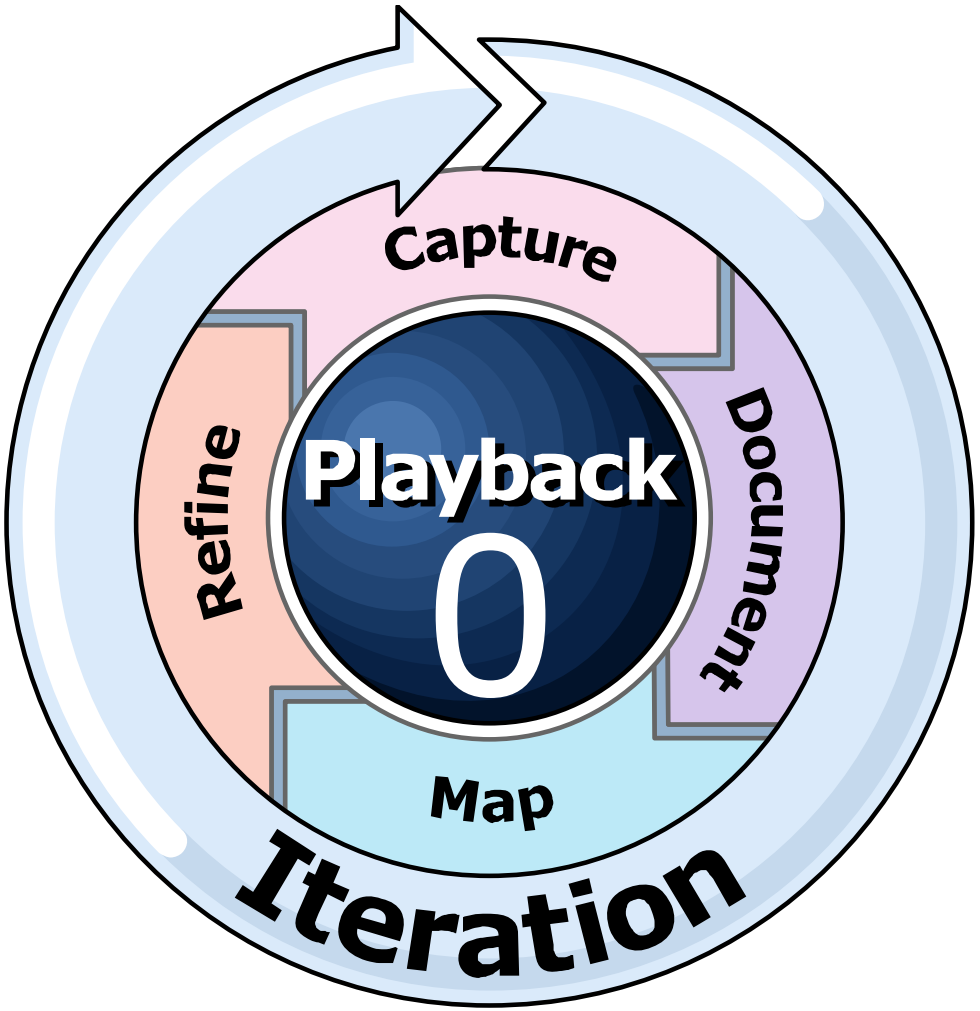
Iteration



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

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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

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Creating a discovery map

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Topics

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

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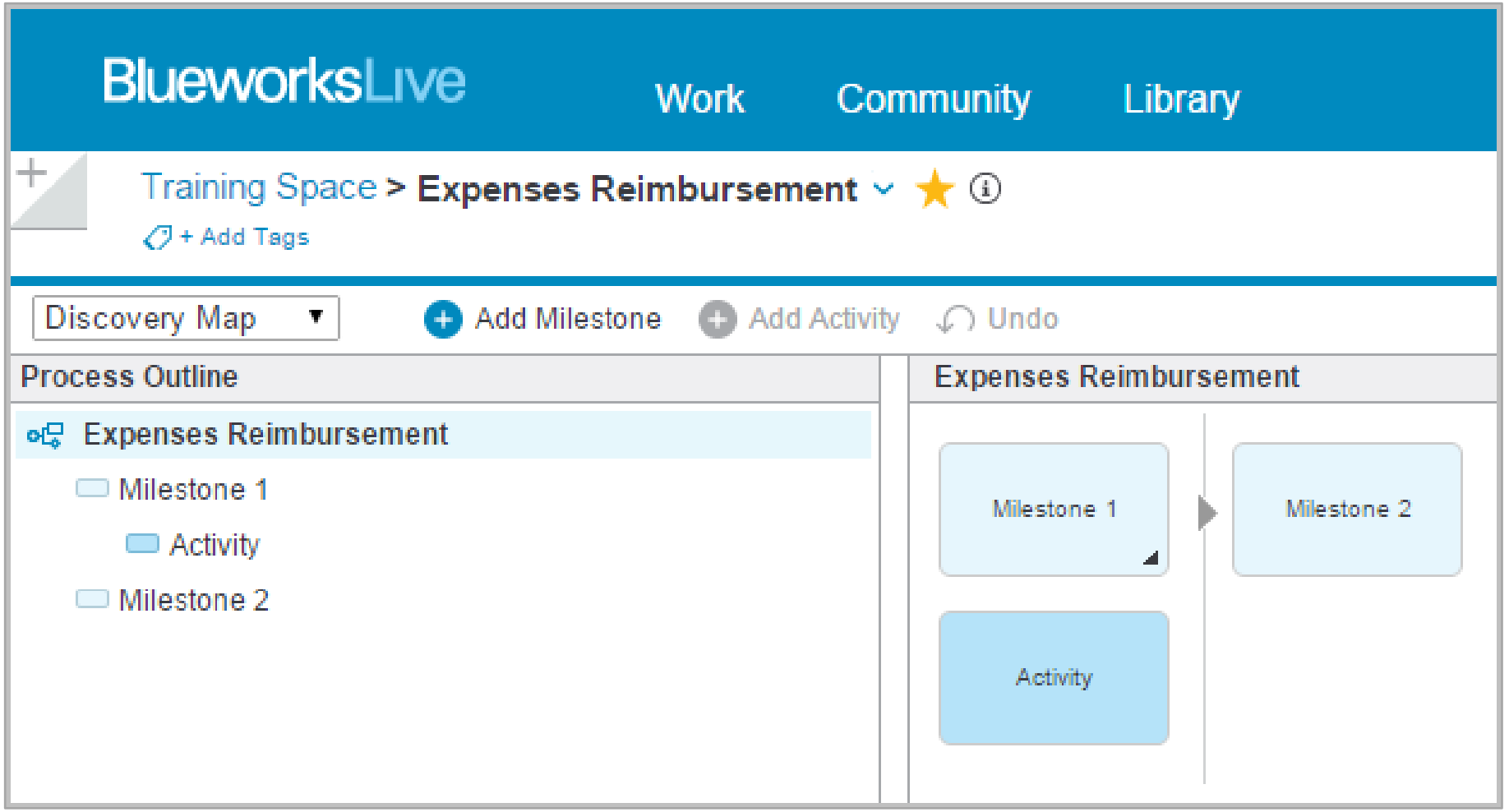
Overview



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

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Discovery map elements and BPMN

Element	Description
	• 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
	• Use an activity to communicate a process task that a single business unit completes • Activity is a BPMN standard
	• Use a subprocess to communicate an activity that multiple business units complete • Subprocess is a BPMN standard

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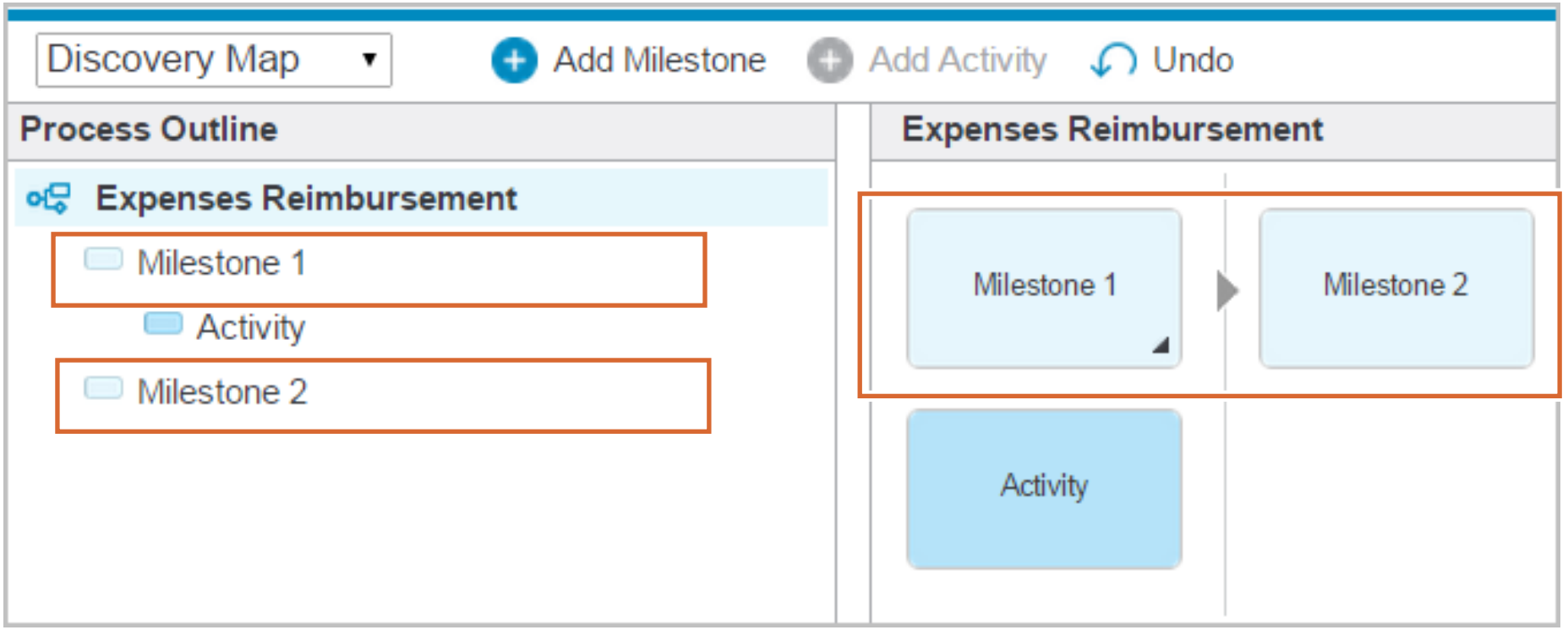
Milestones



- Milestones are used to define a particular process phase

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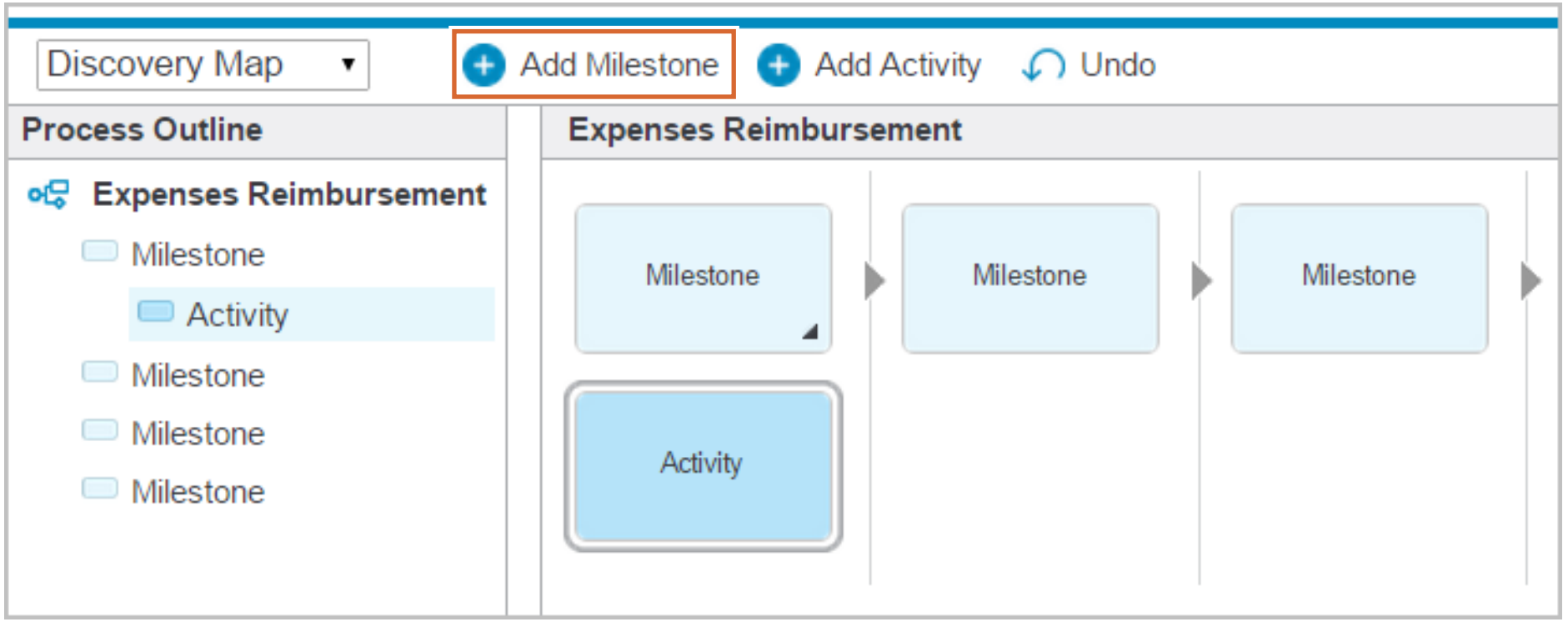
Milestone example: Expense reimbursement (1 of 2)



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

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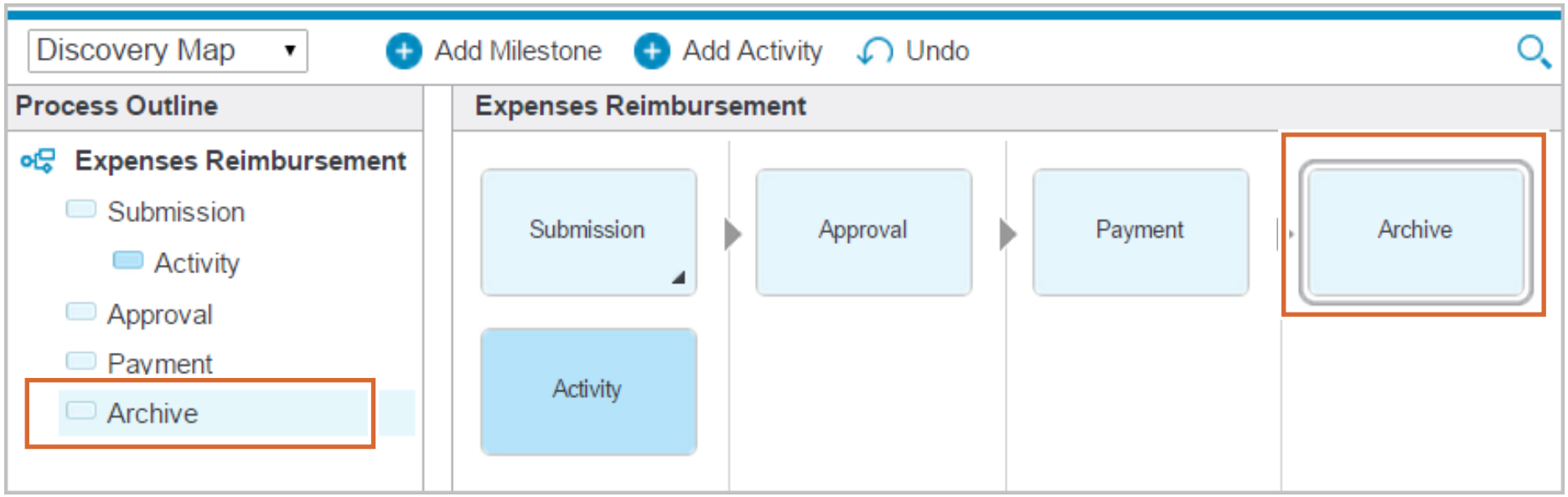
Milestone example: Expense reimbursement (2 of 2)



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

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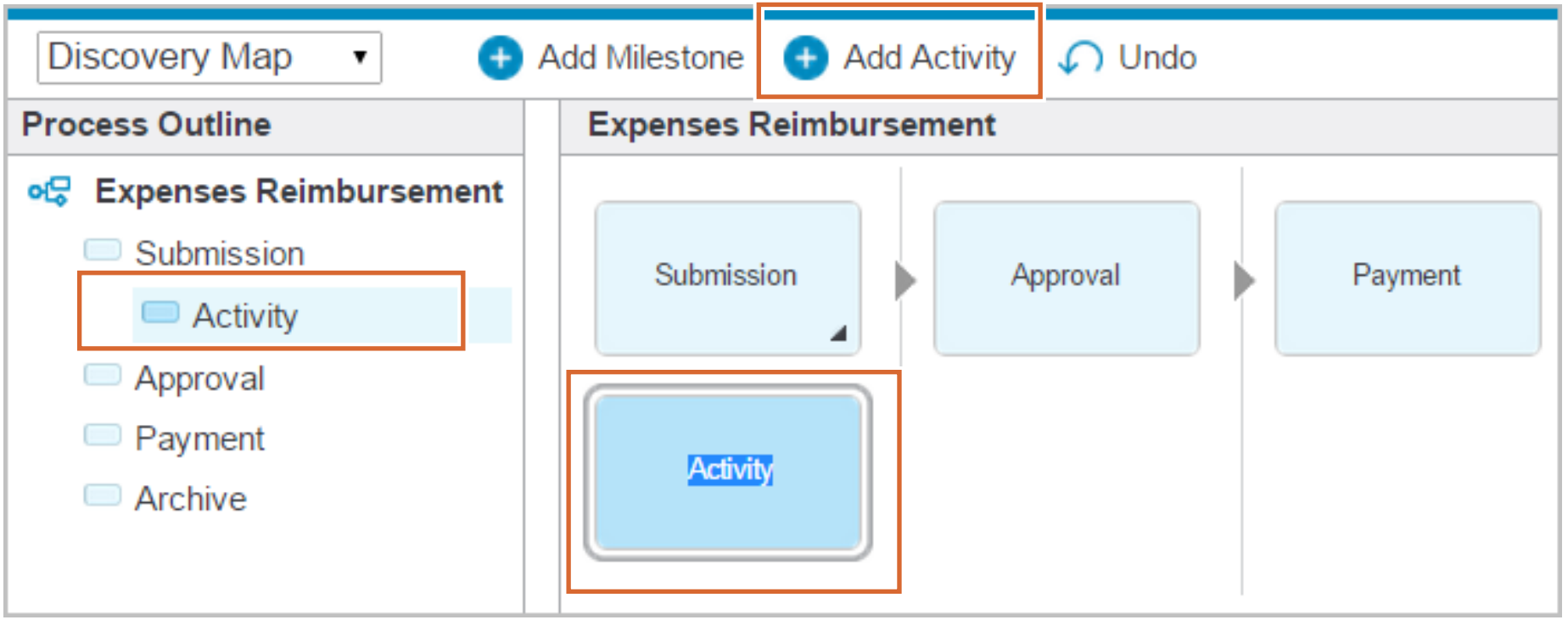
Activity



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

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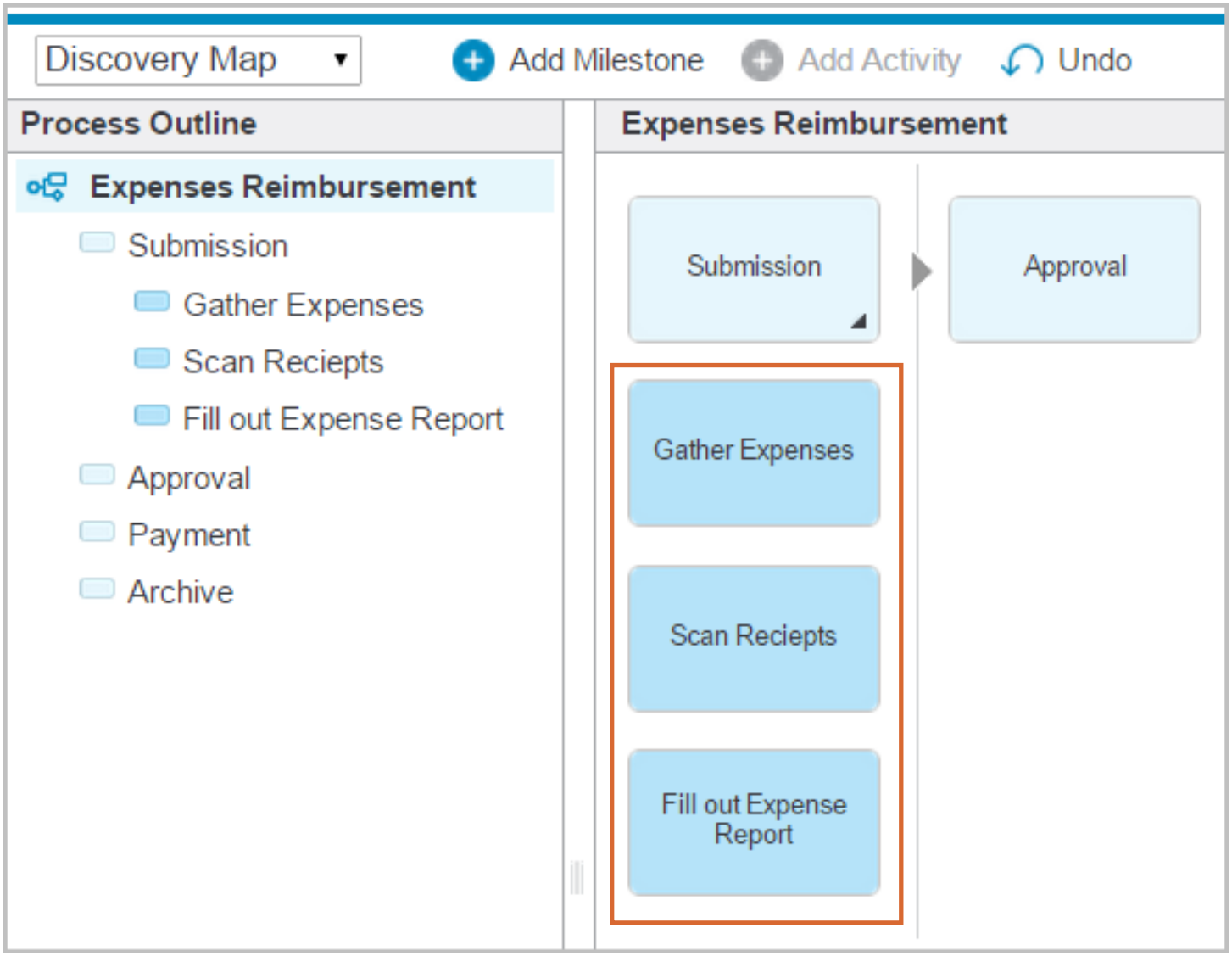
Activity example: Expense reimbursement steps



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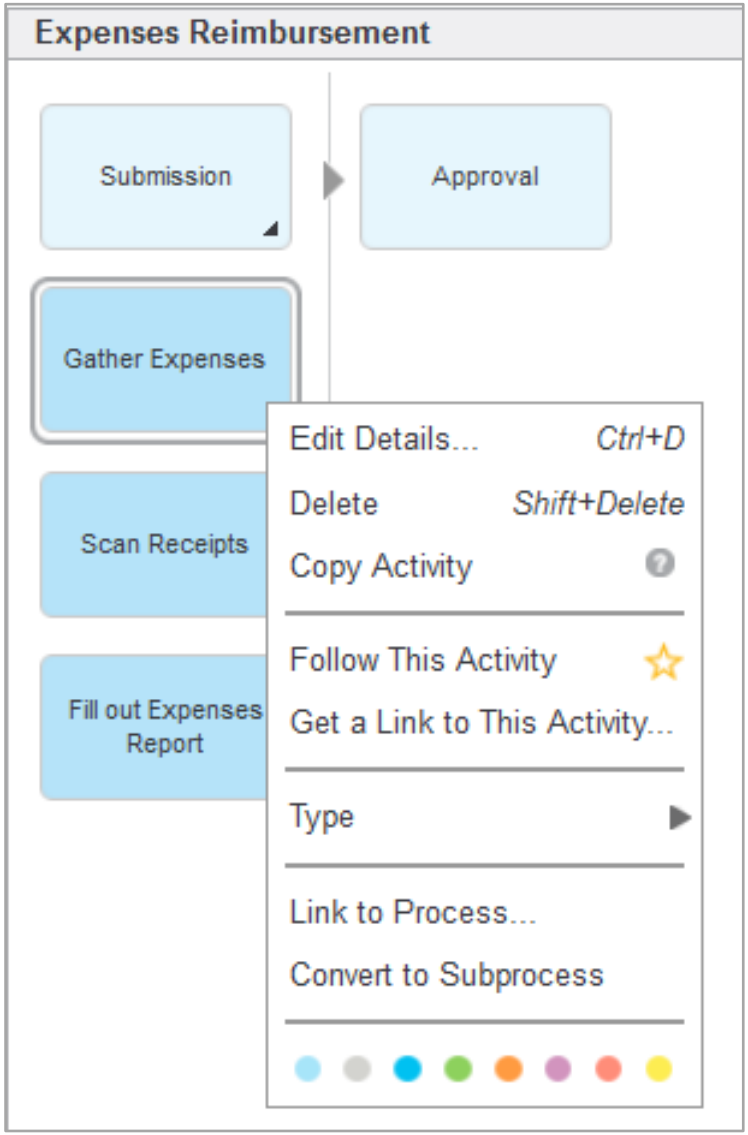
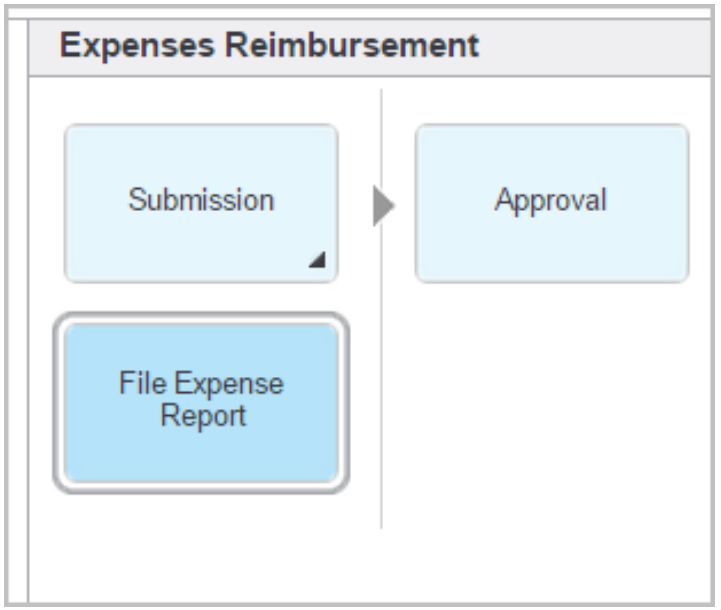
Activity example: Expense reimbursement activity





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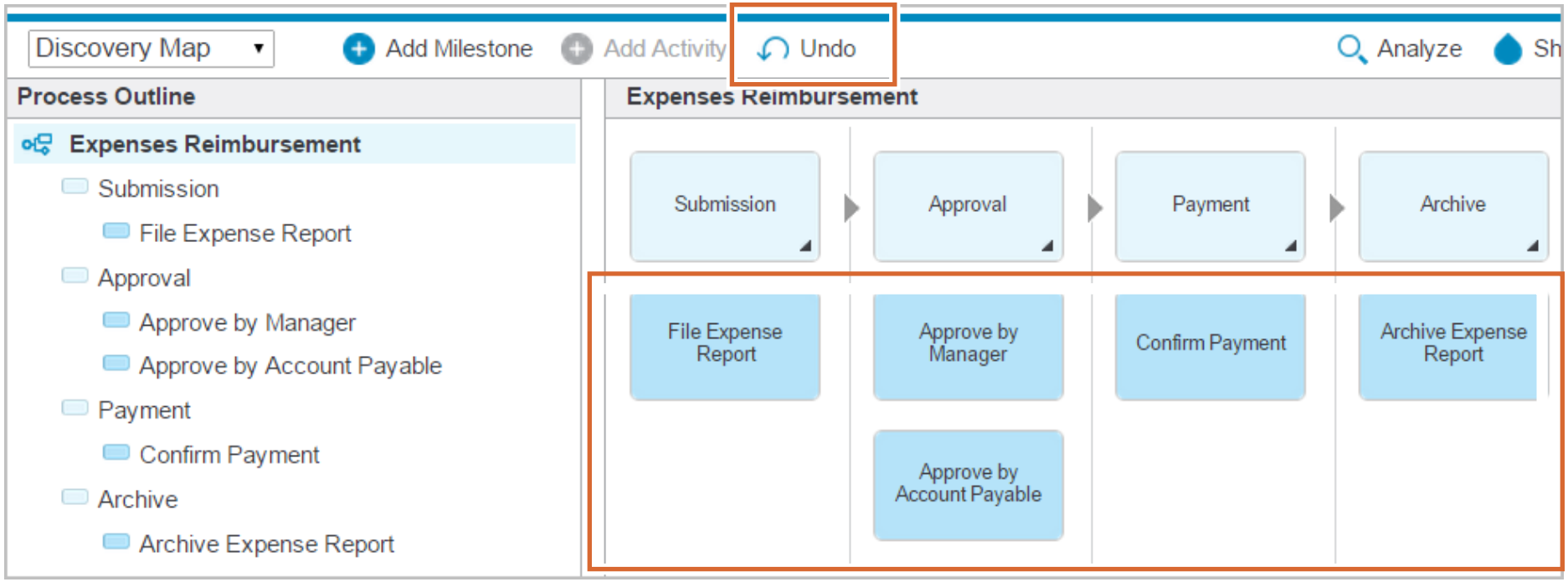
Activity example: Expense reimbursement final activities



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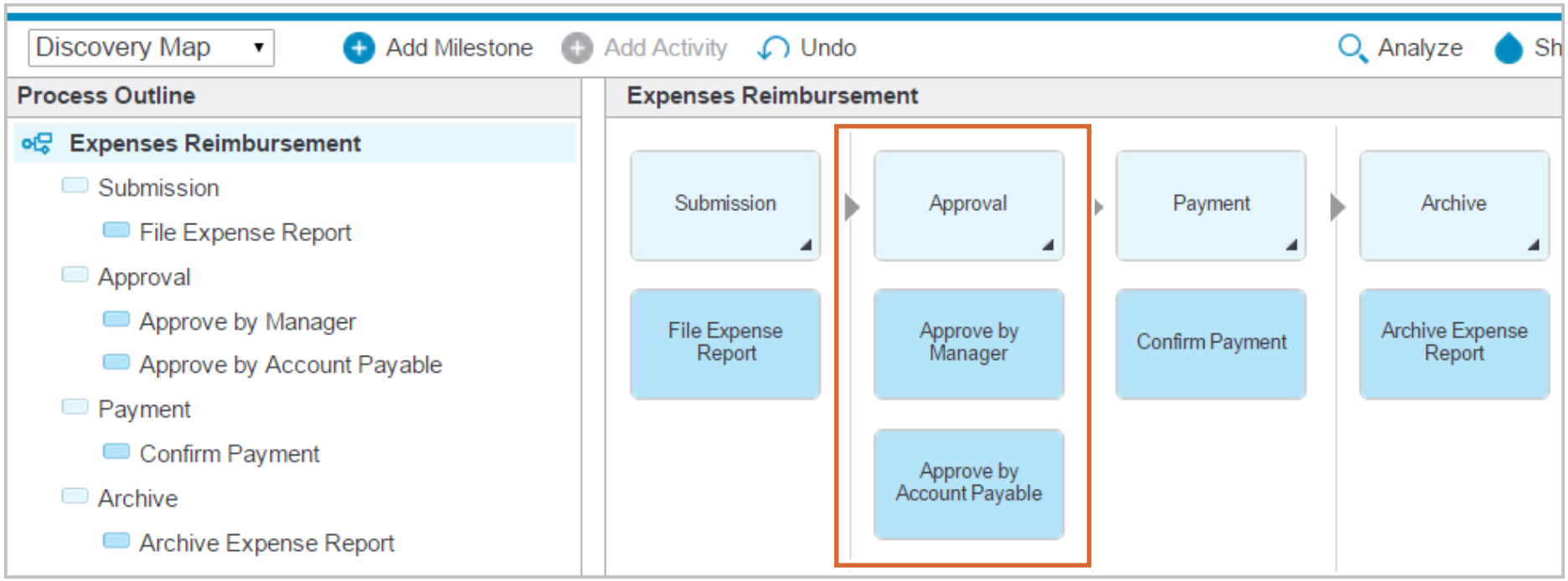
Subprocess



- A subprocess is an activity that different business units complete

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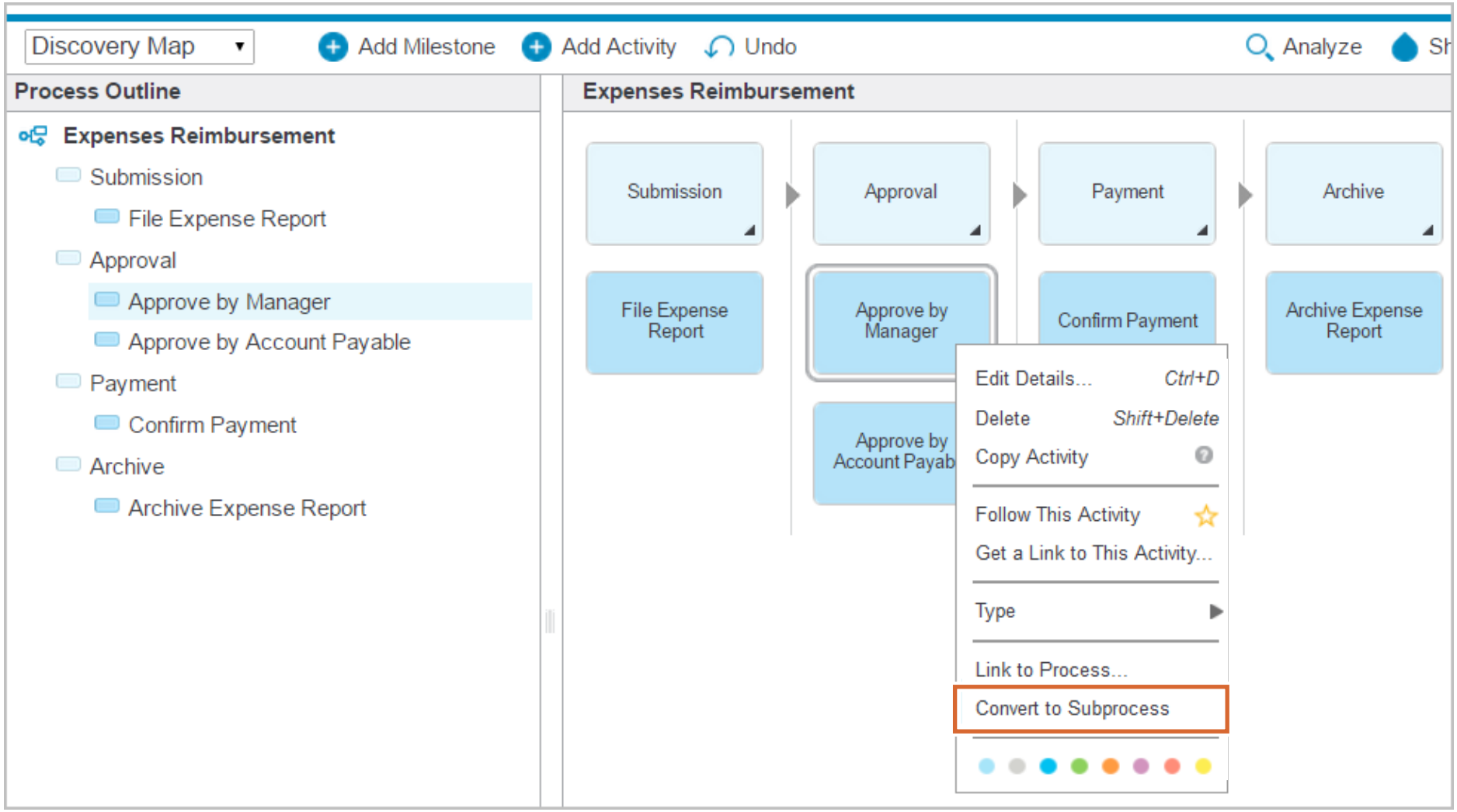
Subprocess example: Expense reimbursement (1 of 3)



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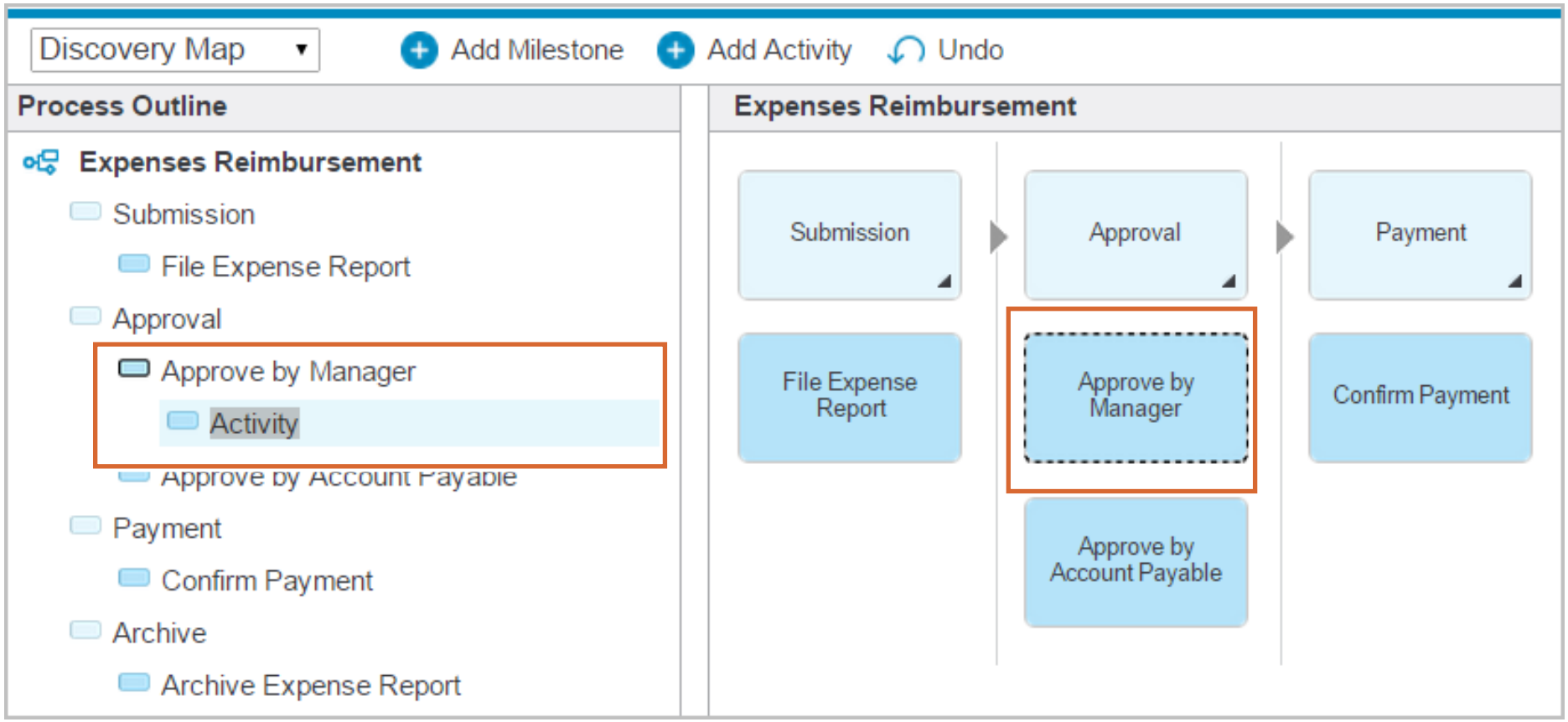
Subprocess example: Expense reimbursement (2 of 3)



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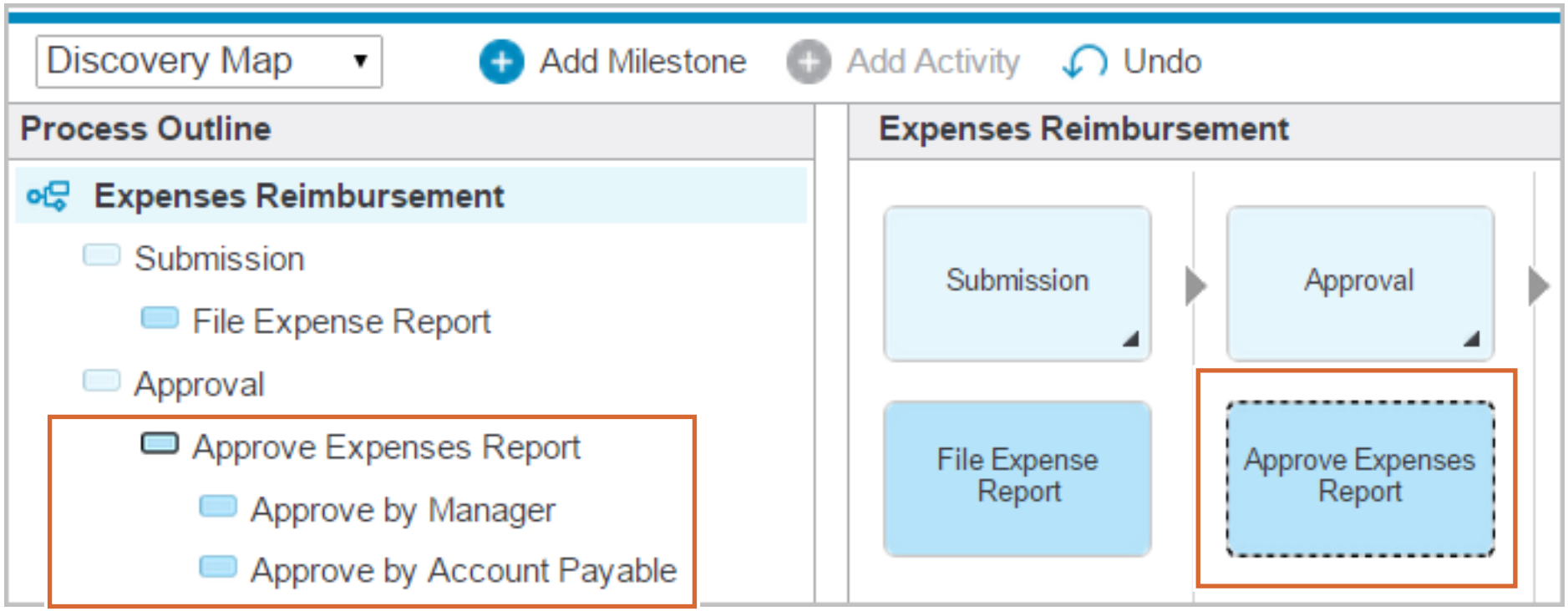
Subprocess example: Expense reimbursement (3 of 3)



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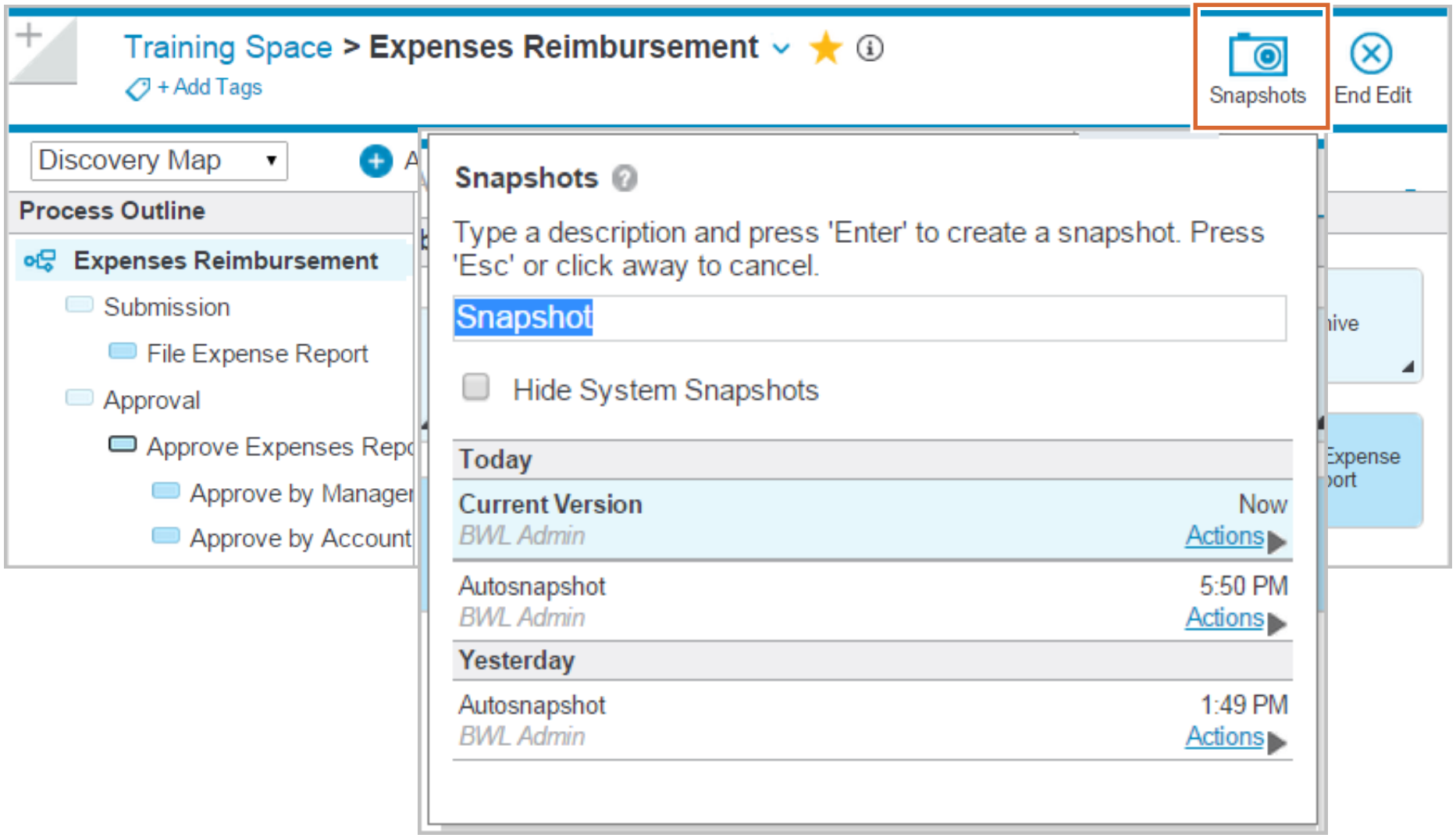
Create a snapshot



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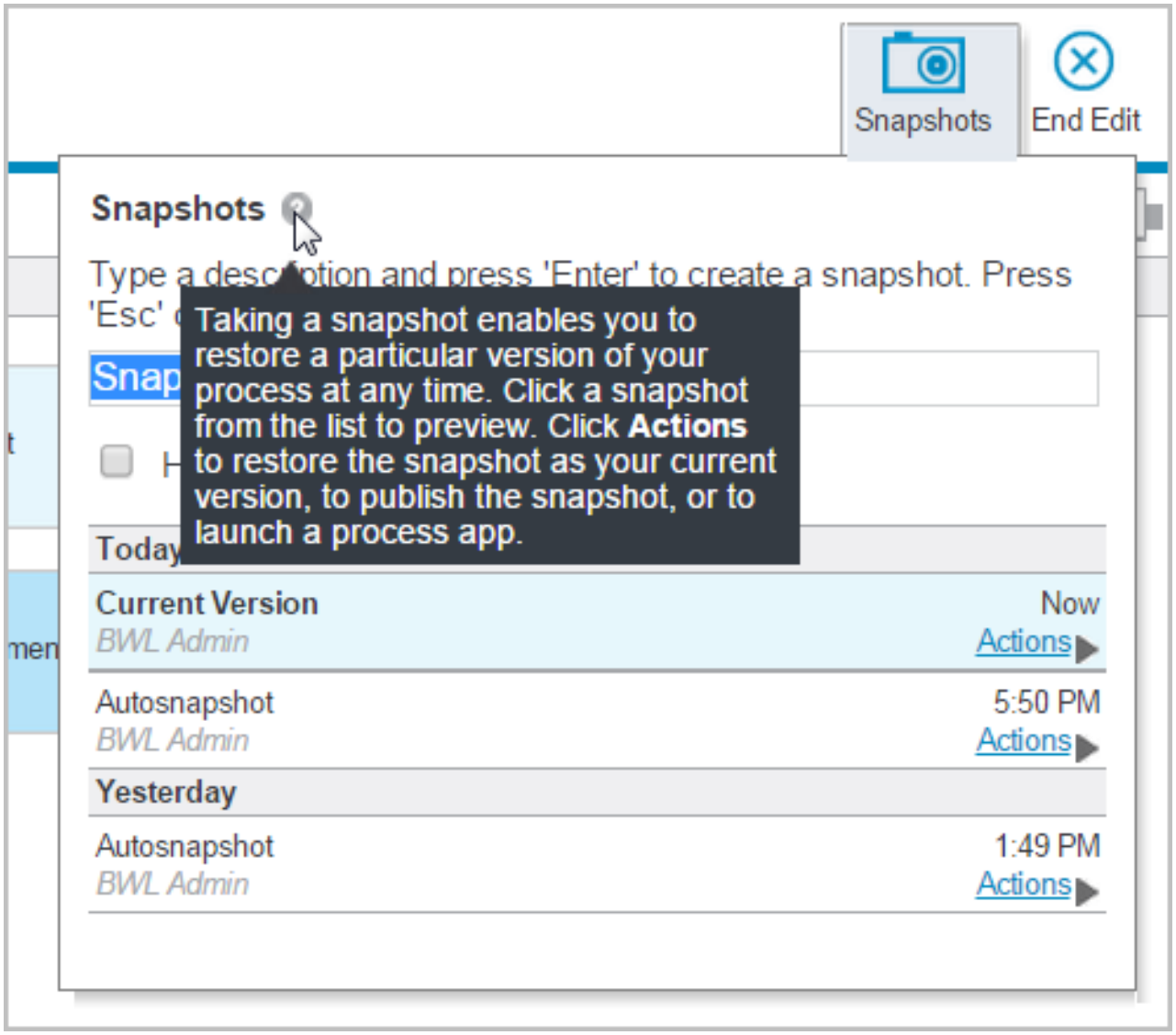
Revision history



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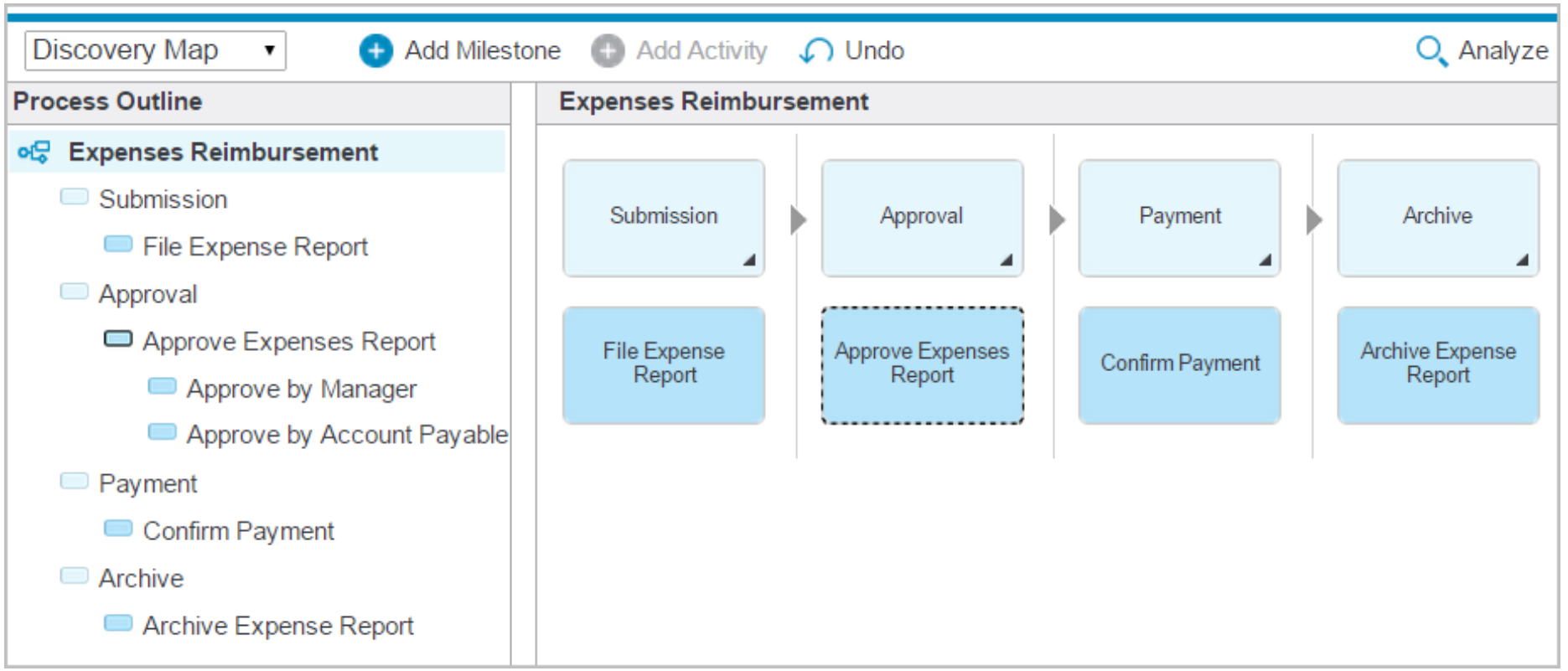
Modifying the discovery map (1 of 4)



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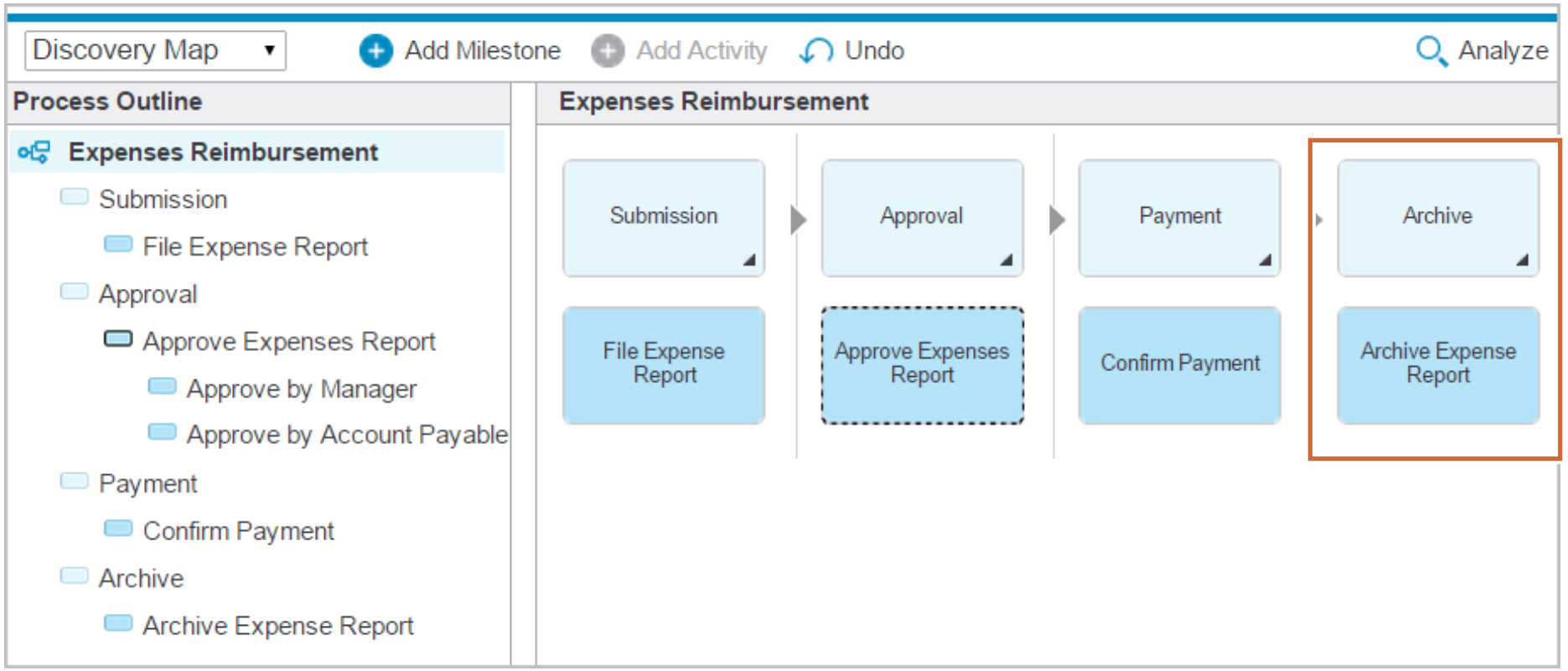
Modifying the discovery map (2 of 4)



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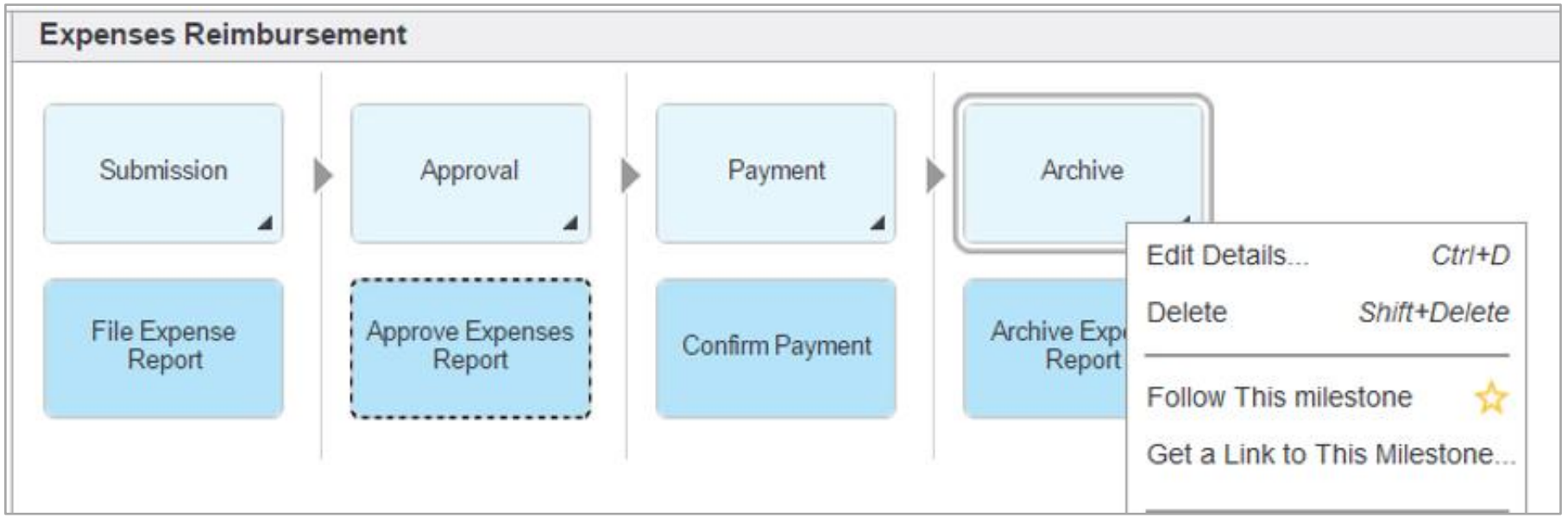
Modifying the discovery map (3 of 4)



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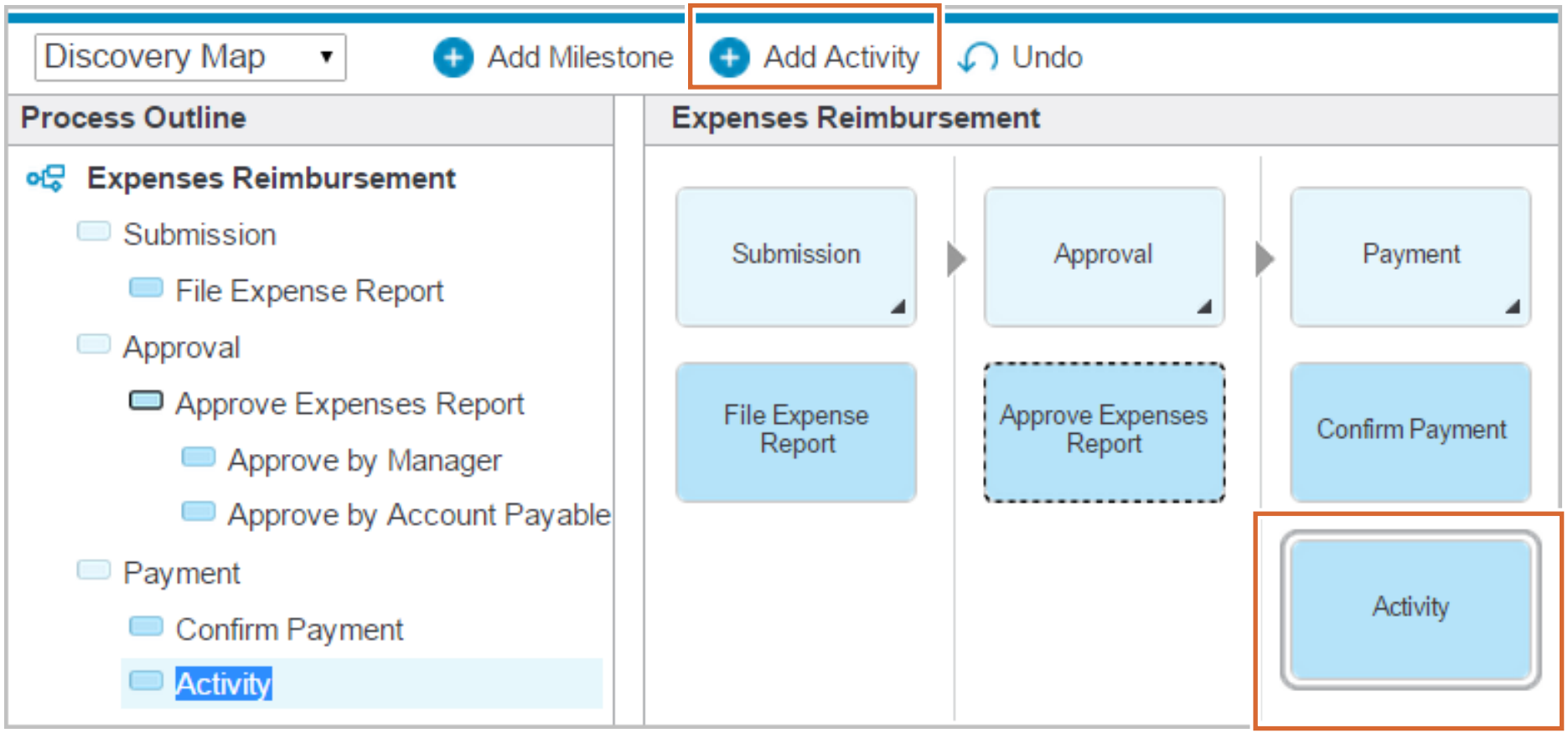
Modifying the discovery map (4 of 4)



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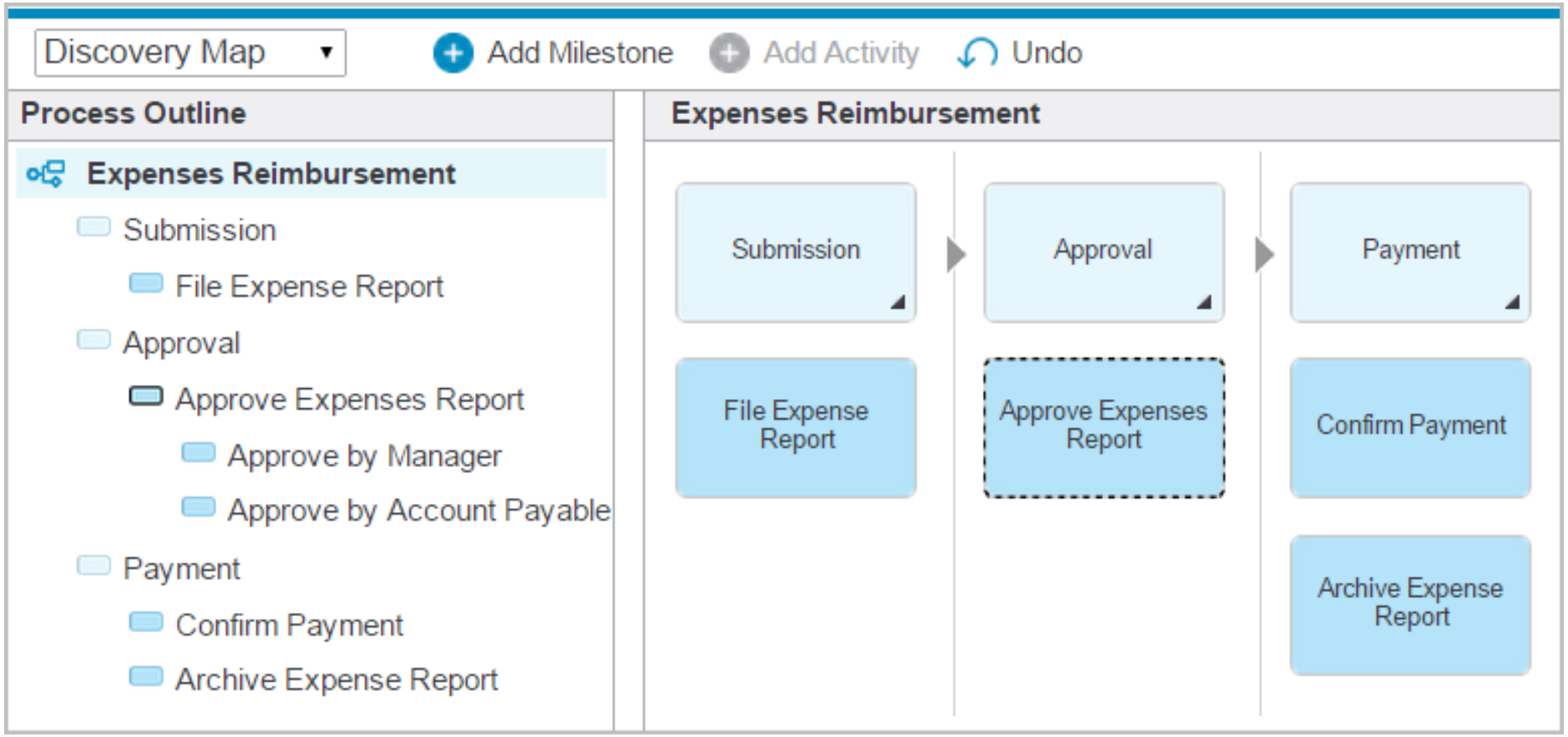
Discovery map final edit



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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 competed
- 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

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Exercise 2: Creating a Discovery Map

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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

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Capturing process details

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Topics

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

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Overview

Playback zero

Definition
1 - 3 weeks

Descriptive modeling | **Analytical modeling** | **Validate**

Discovery	As is model	Analysis	To be model	Final Playback
•Process goals •Critical success factors •Scoping •Process capture and documentation	•Current state model in various formats •Captured information: RACI, SIPOC, and pain points	•Refine the current state process model •Added value analysis •Root cause analysis •Opportunity prioritization •Process simulation	•Business data •KPI and metrics •Business case with estimated potential value and impact •Scope and effort assessment •Process model diagram (BPMN)	

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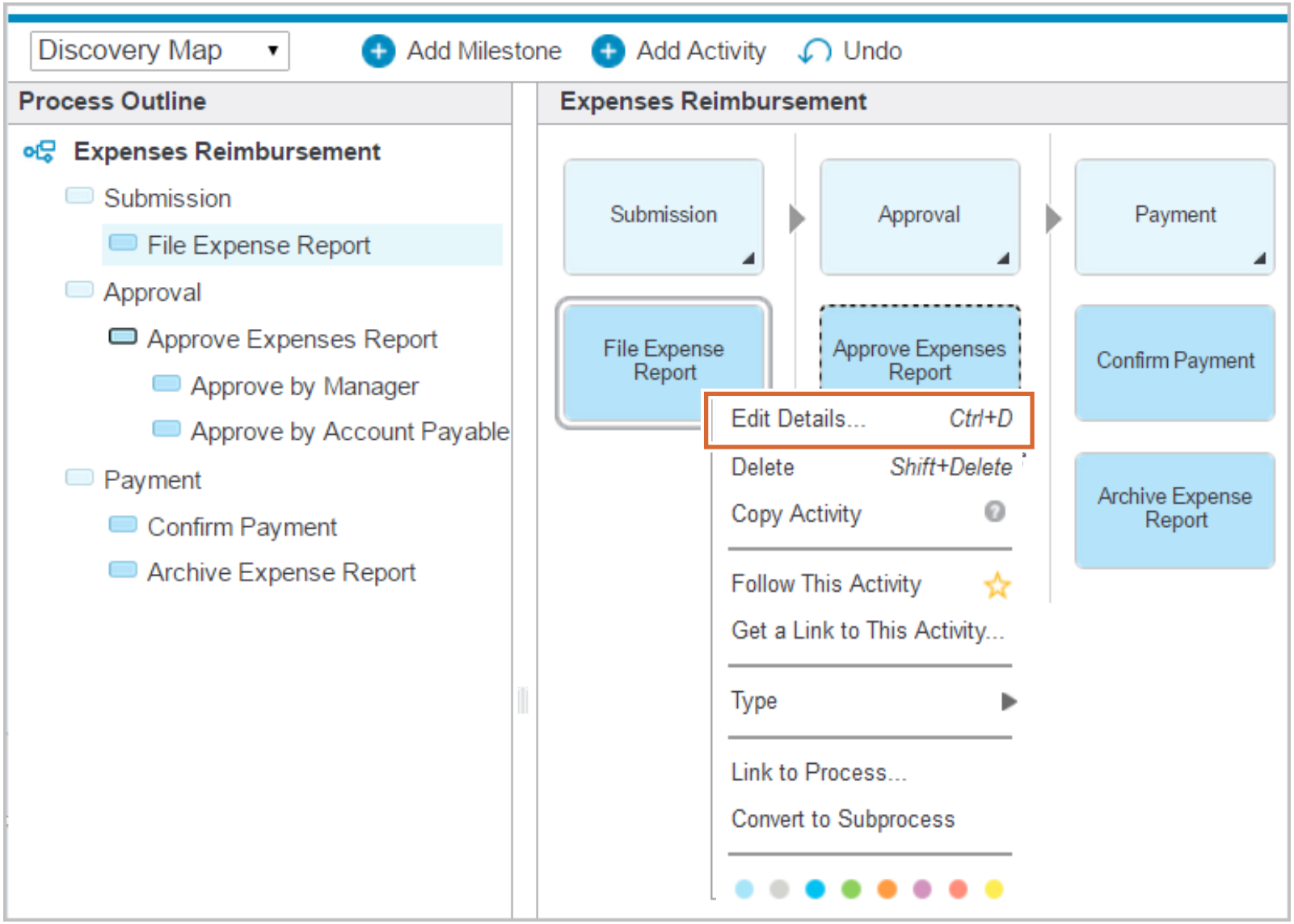
Adding details to a discovery map



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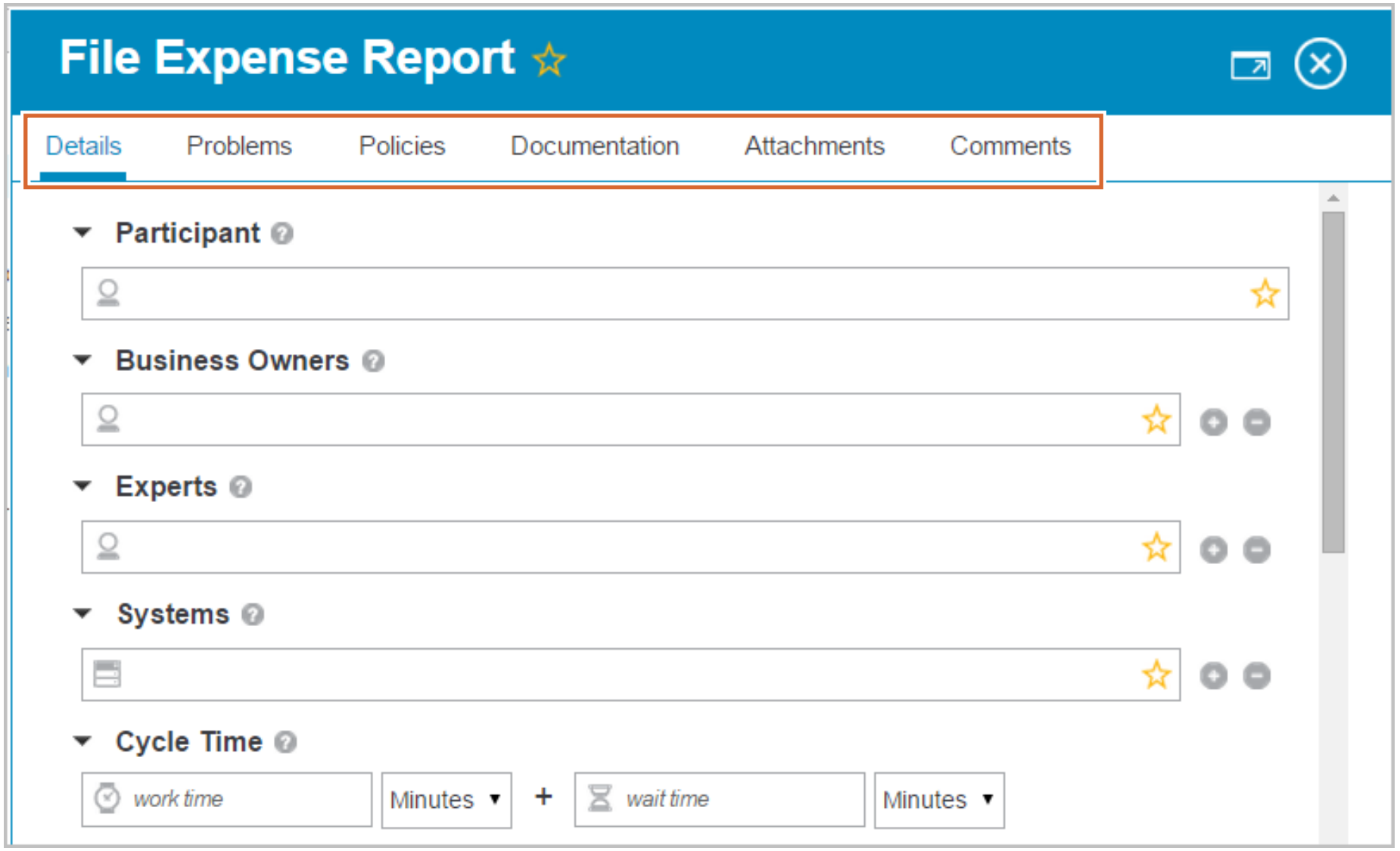
Categories



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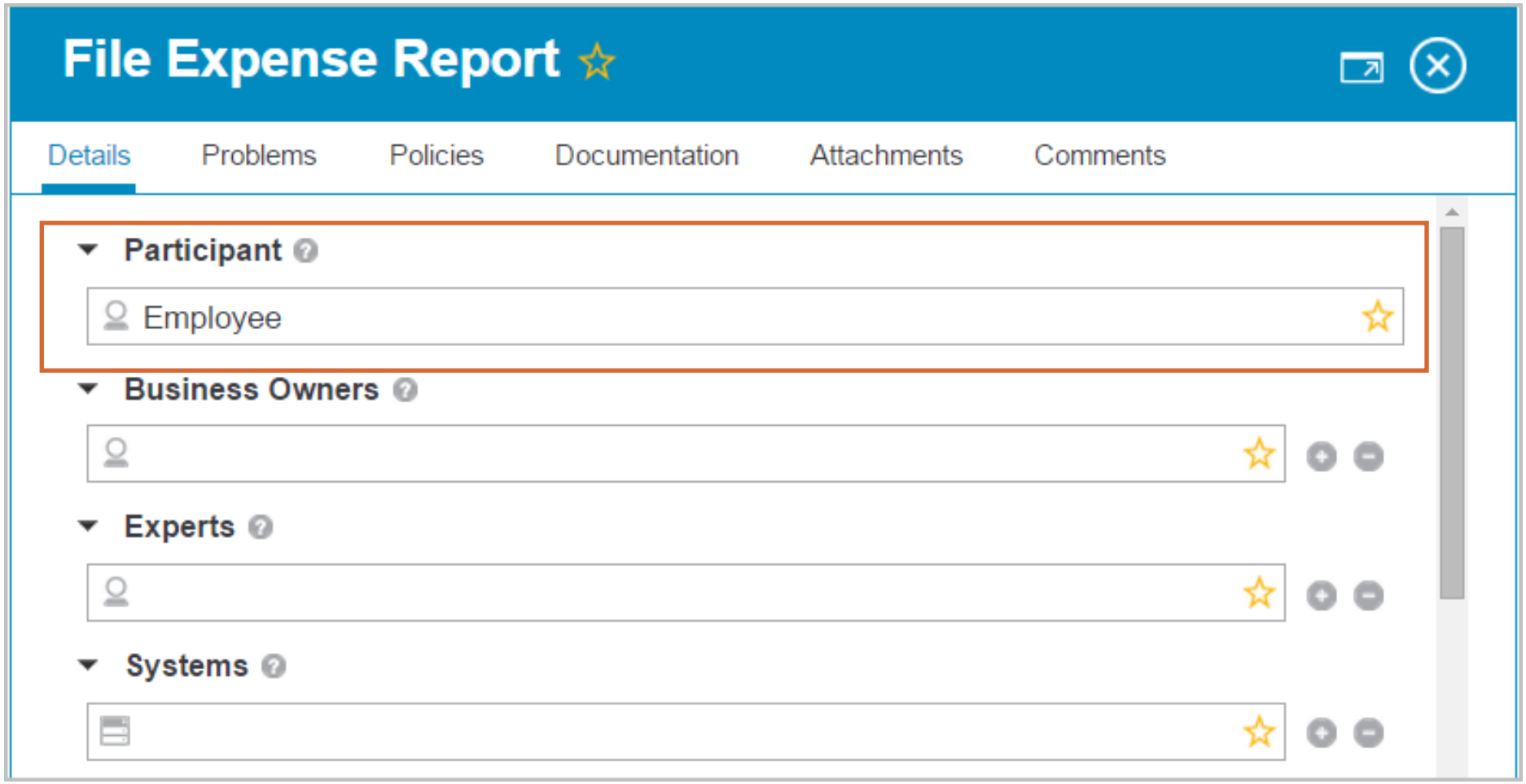
Process participants



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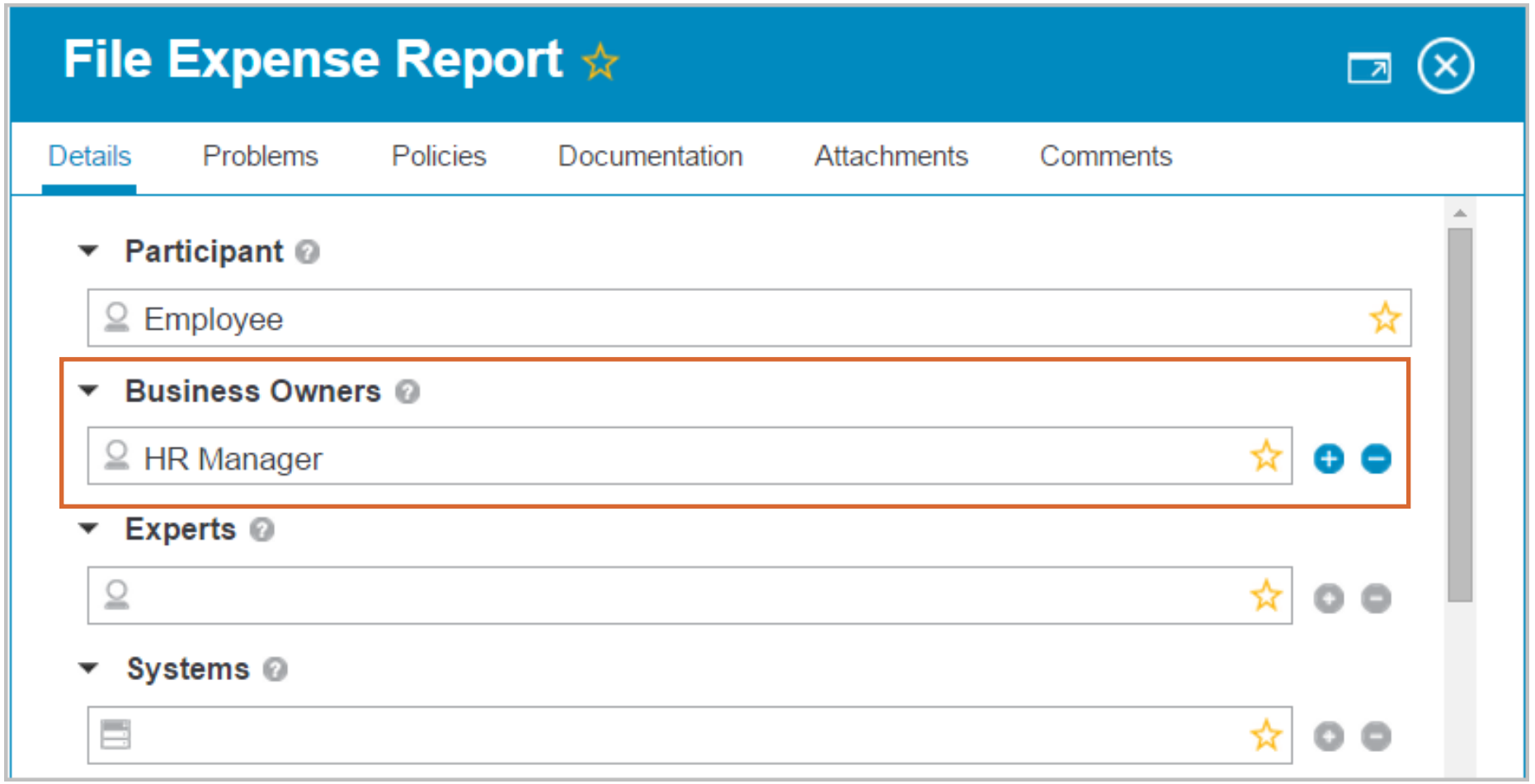
Business owners



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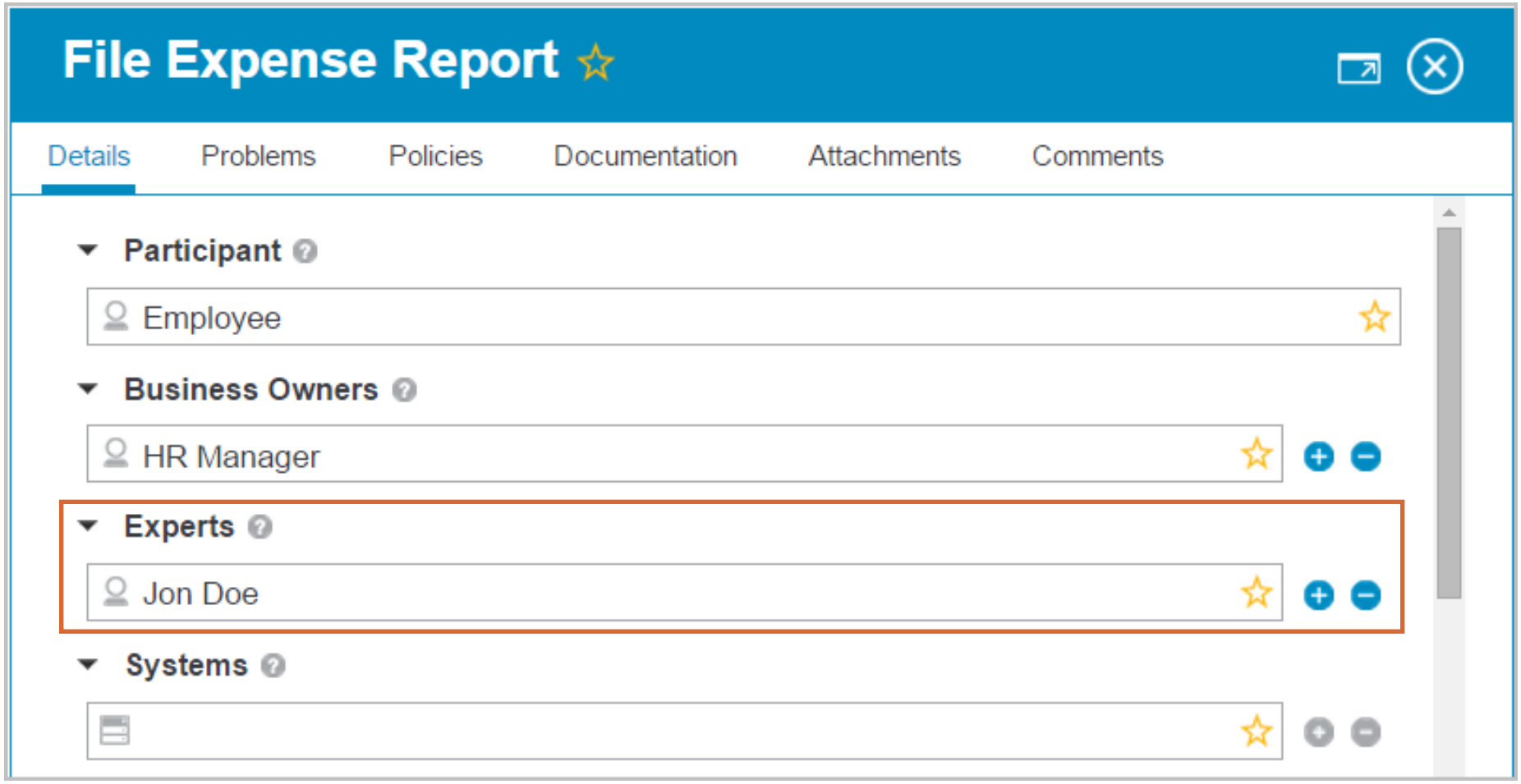
Experts



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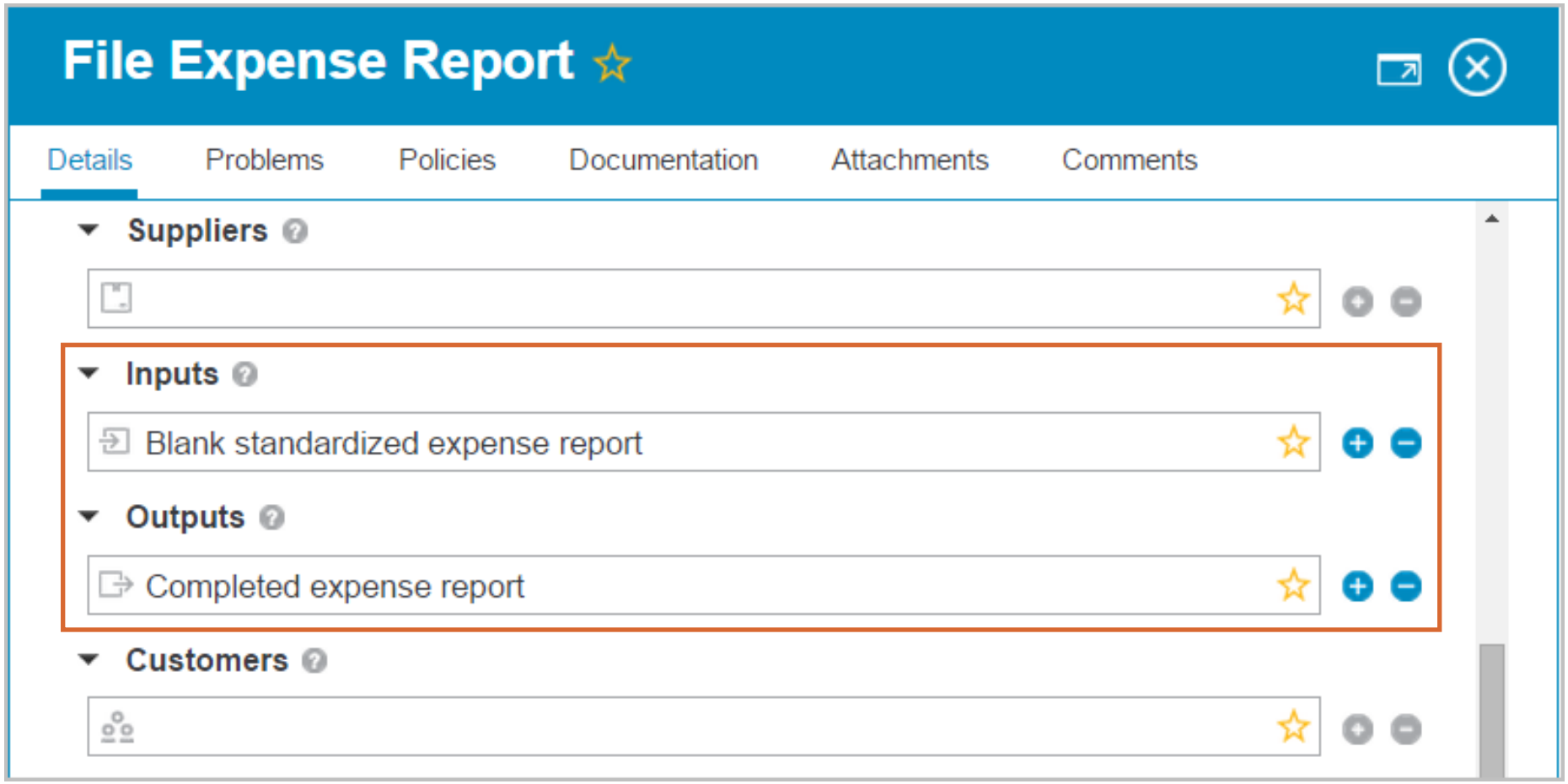
Inputs and Outputs



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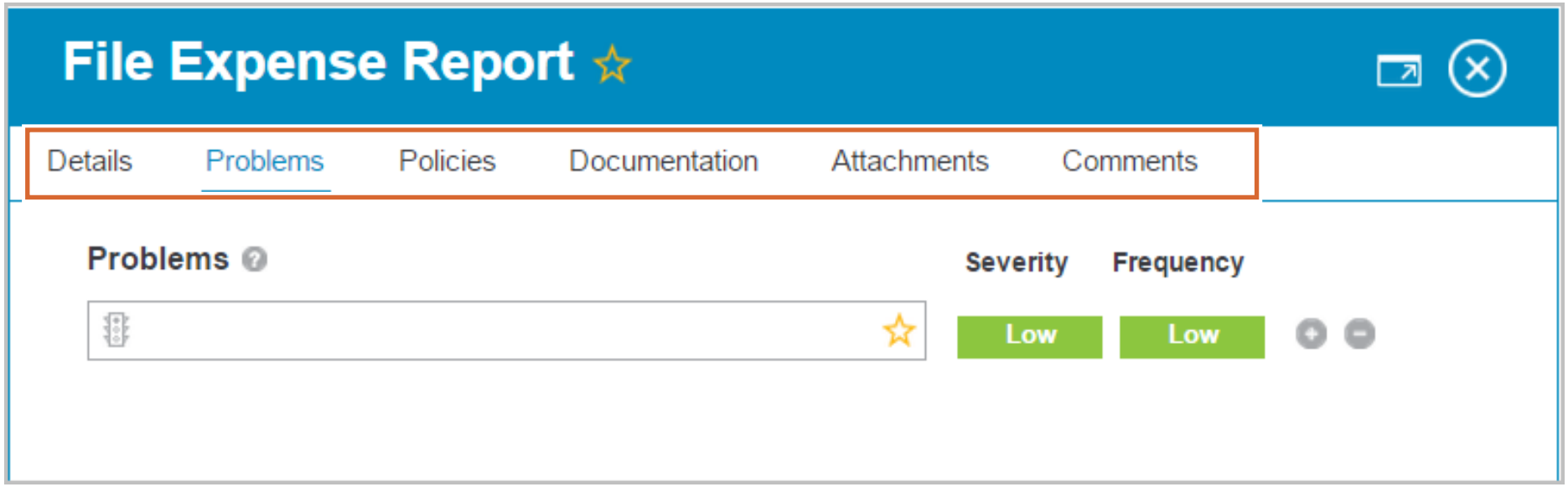
Adding all details



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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

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Exercise 3: Capturing process details in a Discovery Map

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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

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Change to a process diagram

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Topics

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

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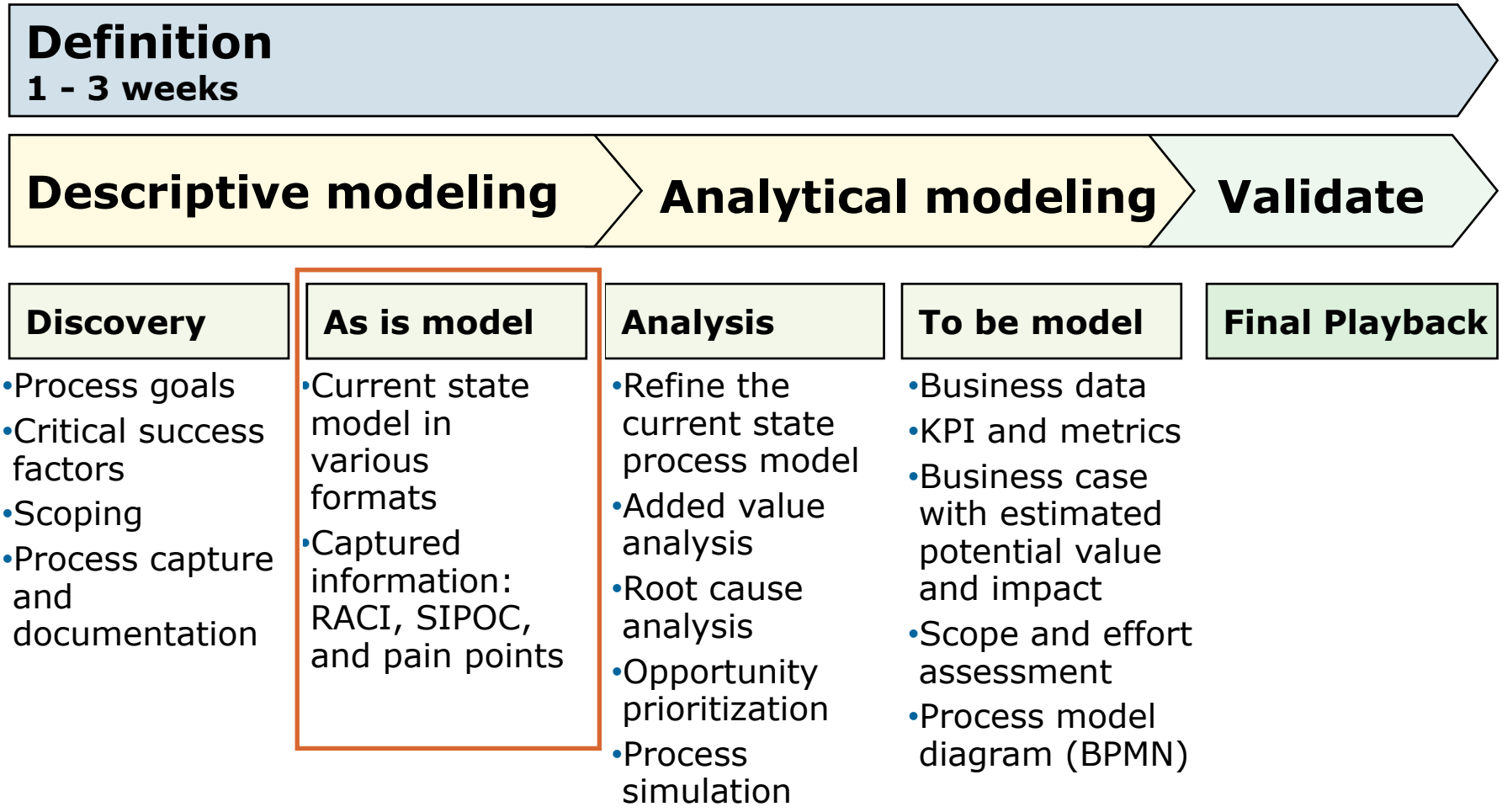
Overview

Playback zero



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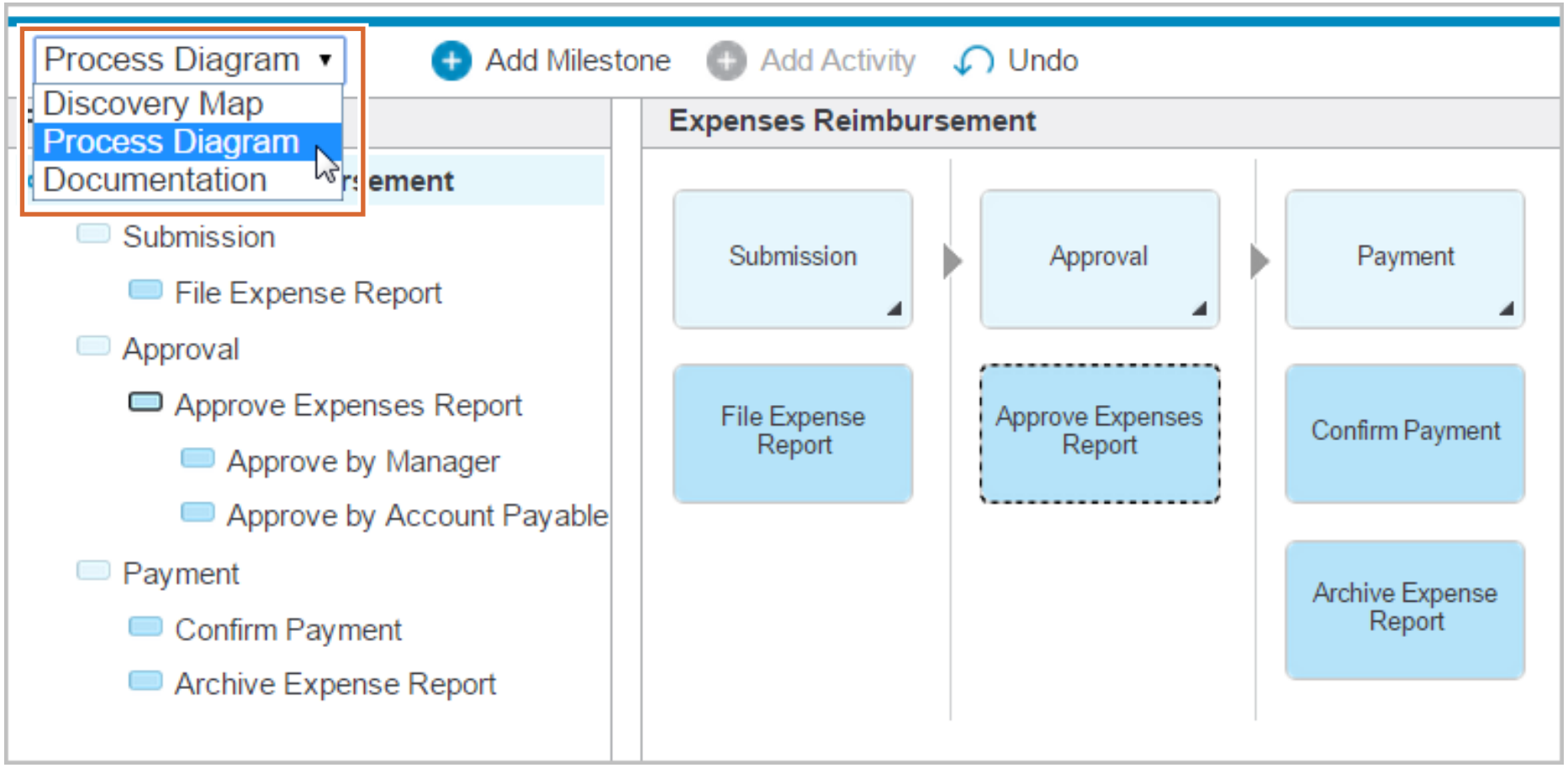
From discovery map to a process diagram



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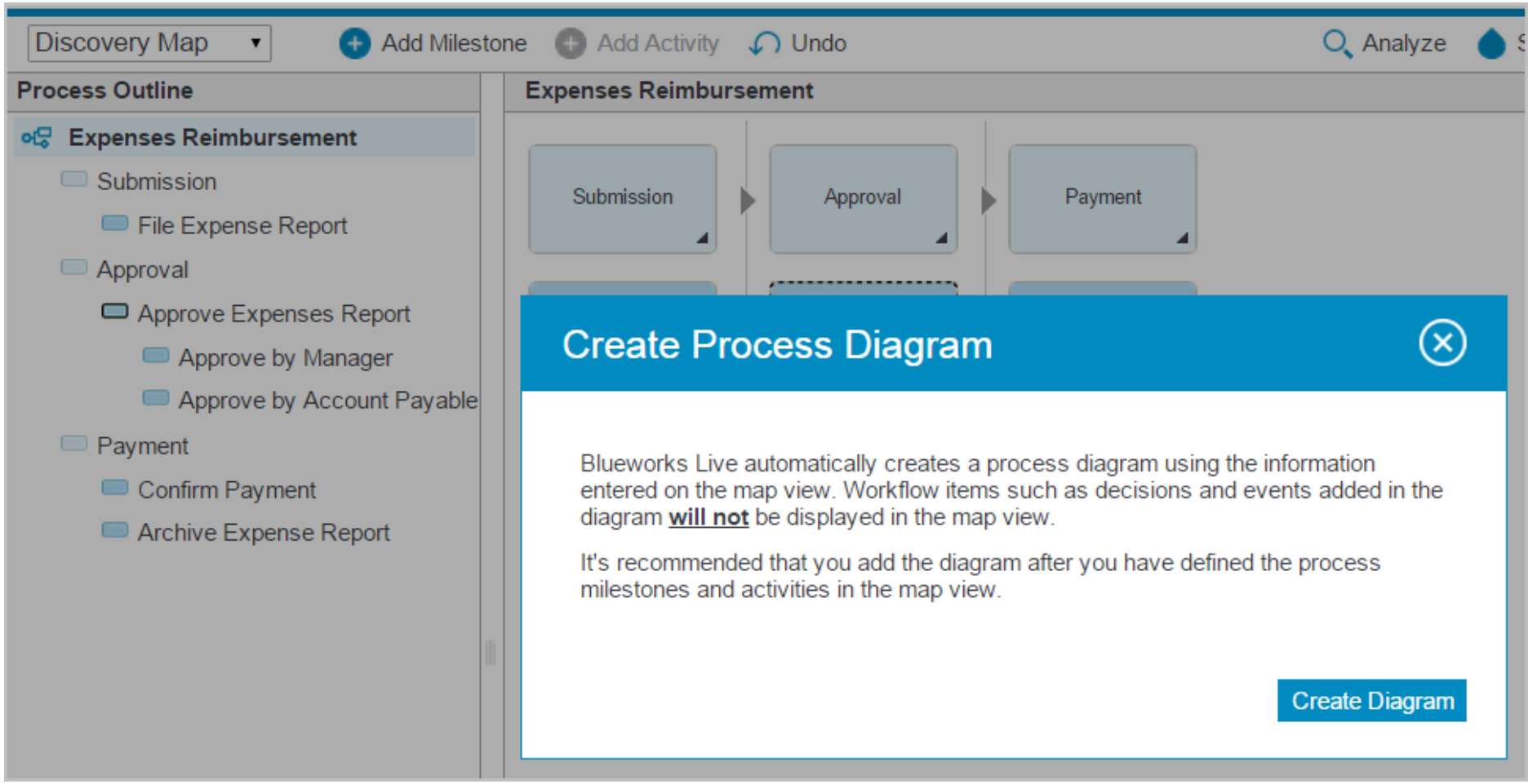
Create the process diagram



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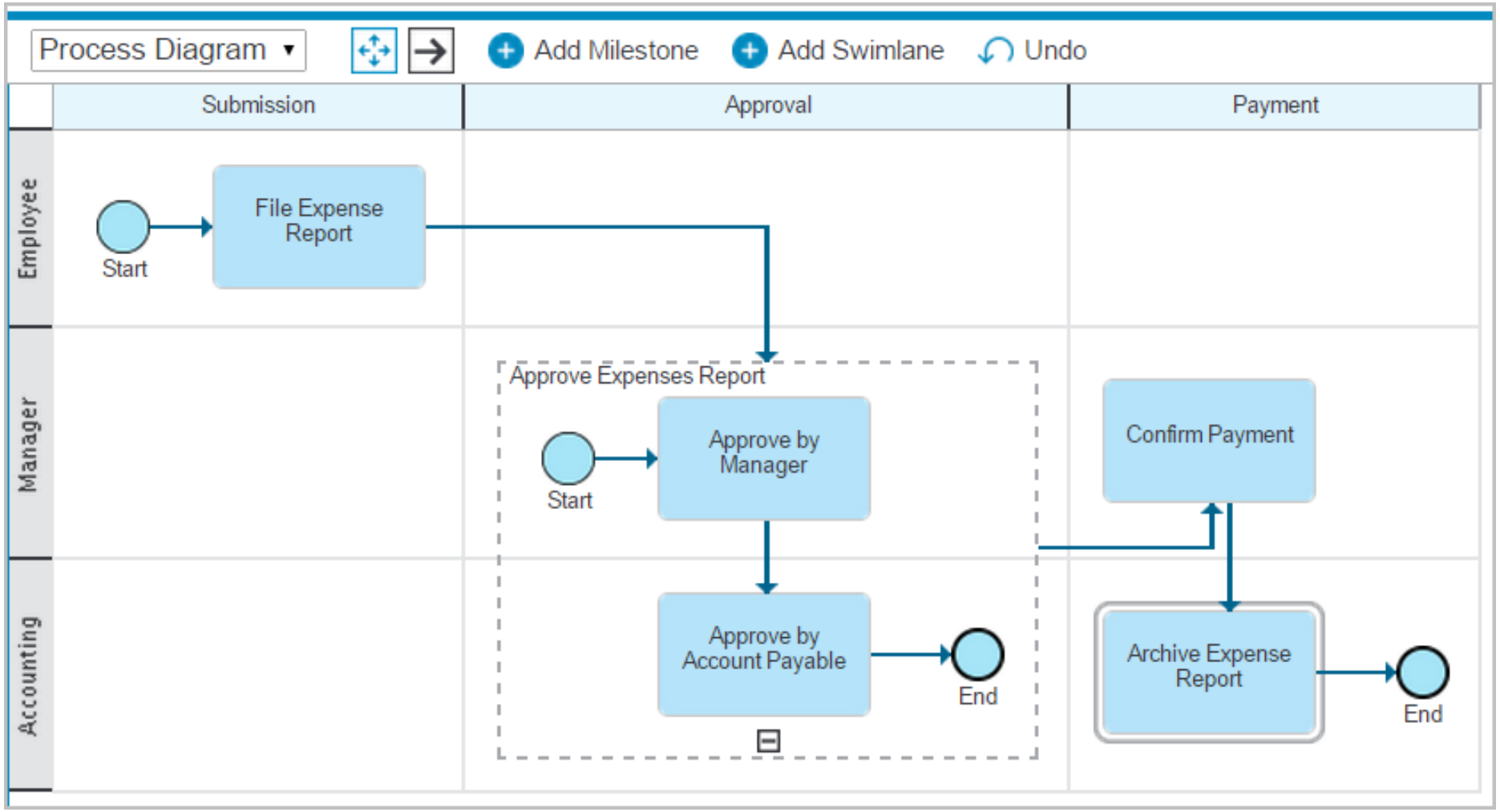
The initial process diagram



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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

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Review questions

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

2. Which phase does user to conduct process capture and documentation during the Playback zero?
   A. Descriptive modeling
   B. Analytical modeling
   C. Validate
   D. Deployment

3. What of the following function do you use to restore a particular version of your process at anytime?
   A. Undo
   B. End Edit
   C. Snapshots
   D. Where Used

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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.

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