

Playback zero - Process Diagram

Unit objectives

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



IBM Blueworks Live process diagram

Topics

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



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

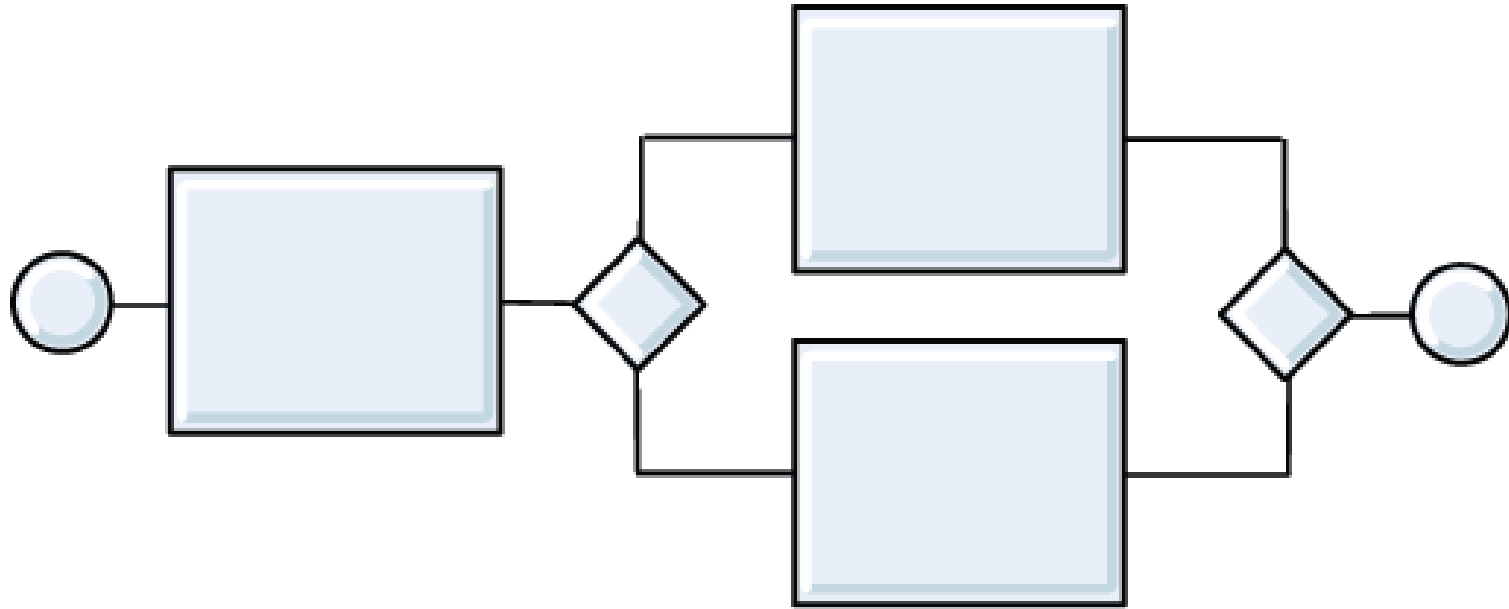
- Refine the current state process model
- Added value analysis
- Root cause analysis
- Opportunity prioritization
- Process simulation

To be model

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

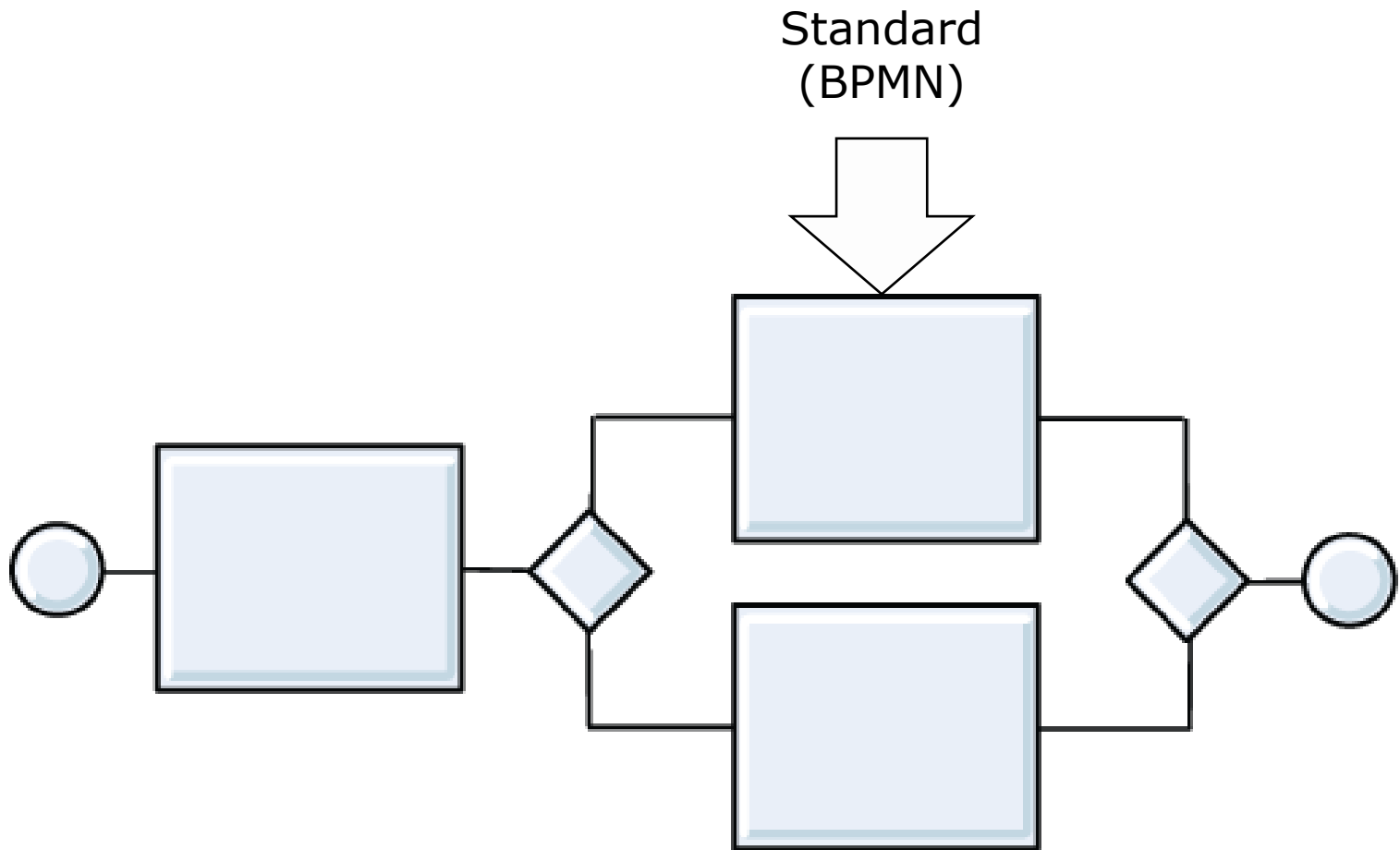
Final Playback

What is a process model?



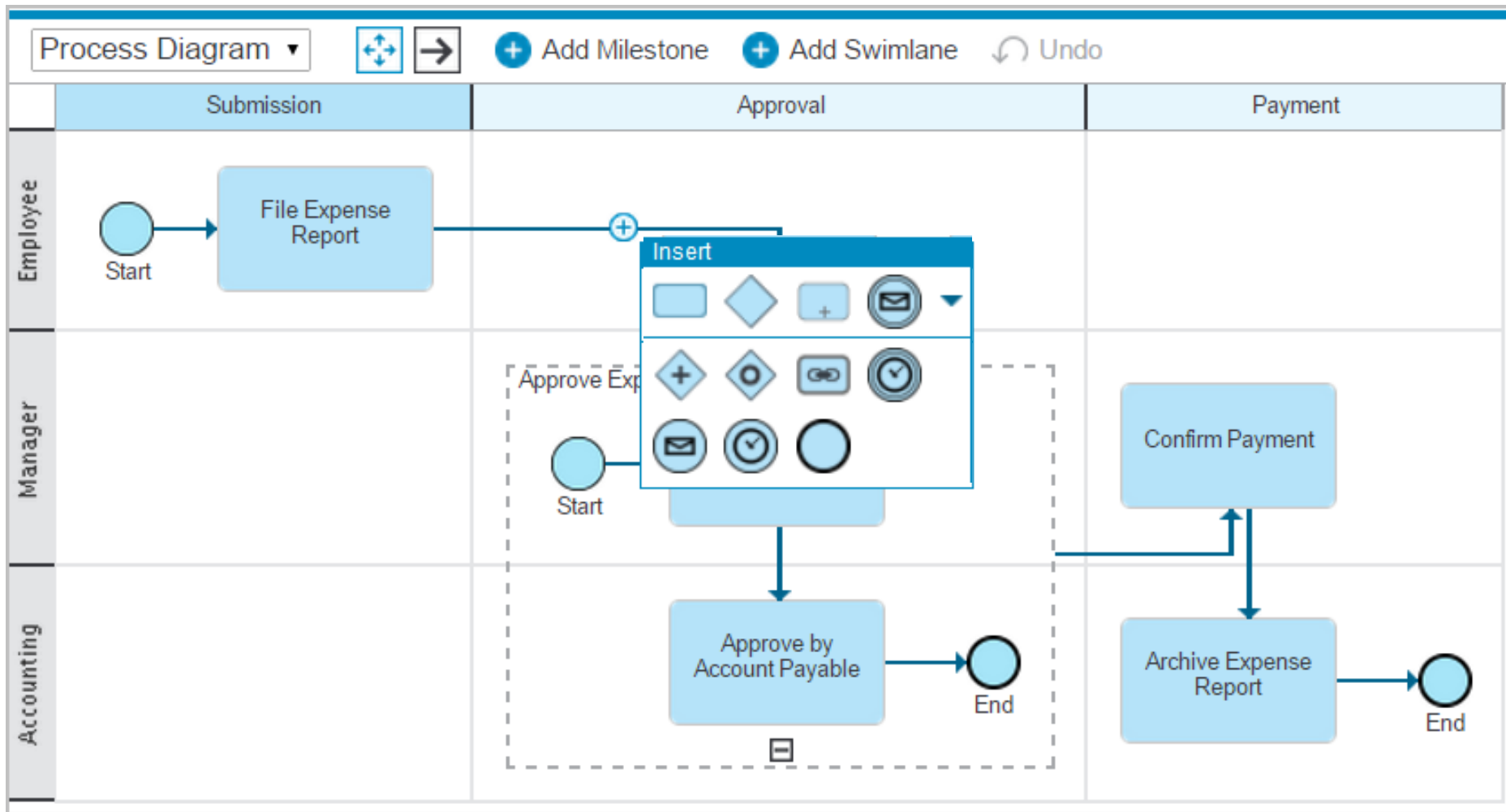
A graphical representation, or diagram, of the business process that is universally understood and easily communicated

Business Process Model and Notation (BPMN)

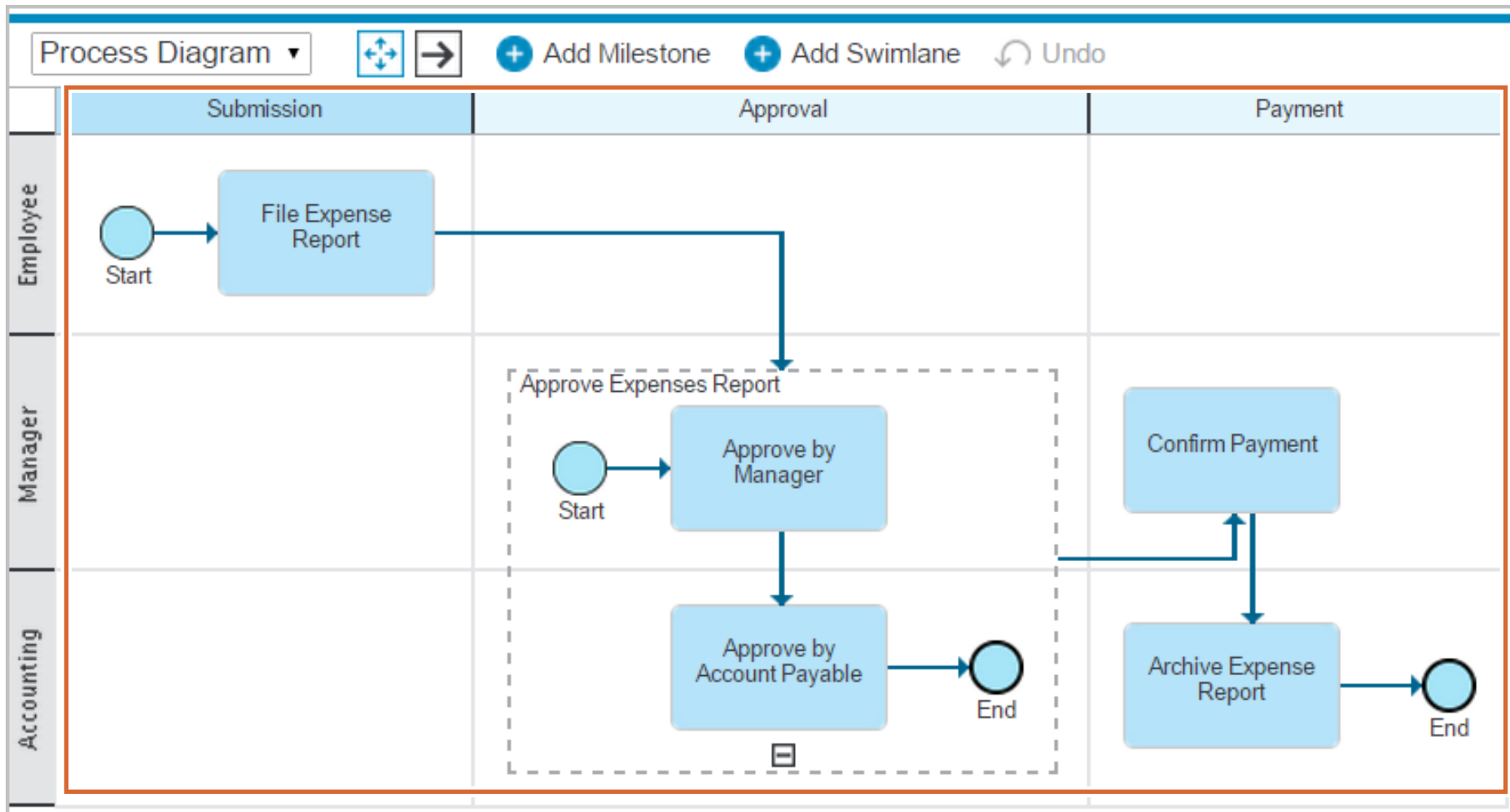


The primary goal of Business Process Model and Notation (BPMN) is to provide the graphical notation that is readily understandable by all

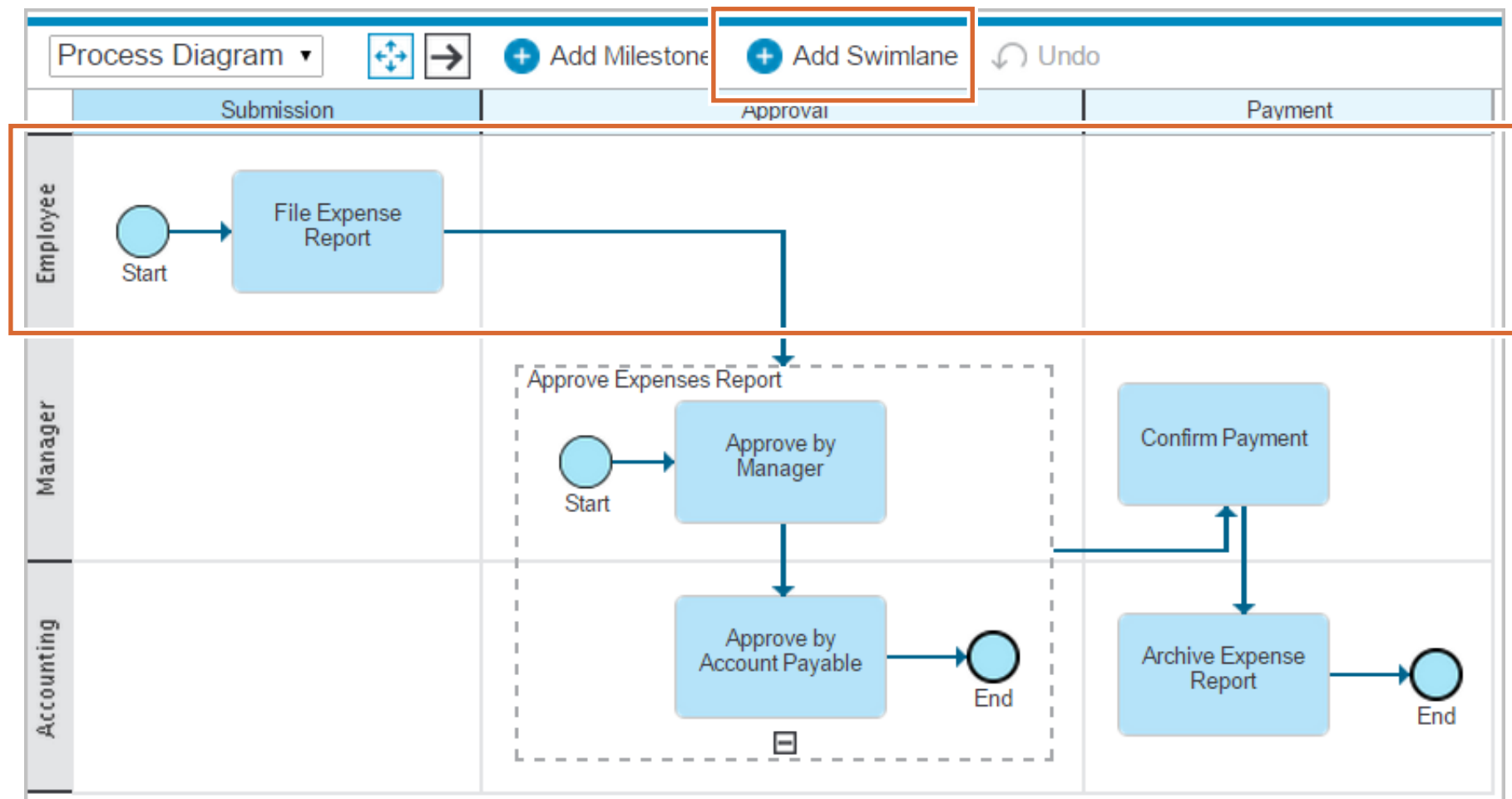
Process diagram BPMN core elements



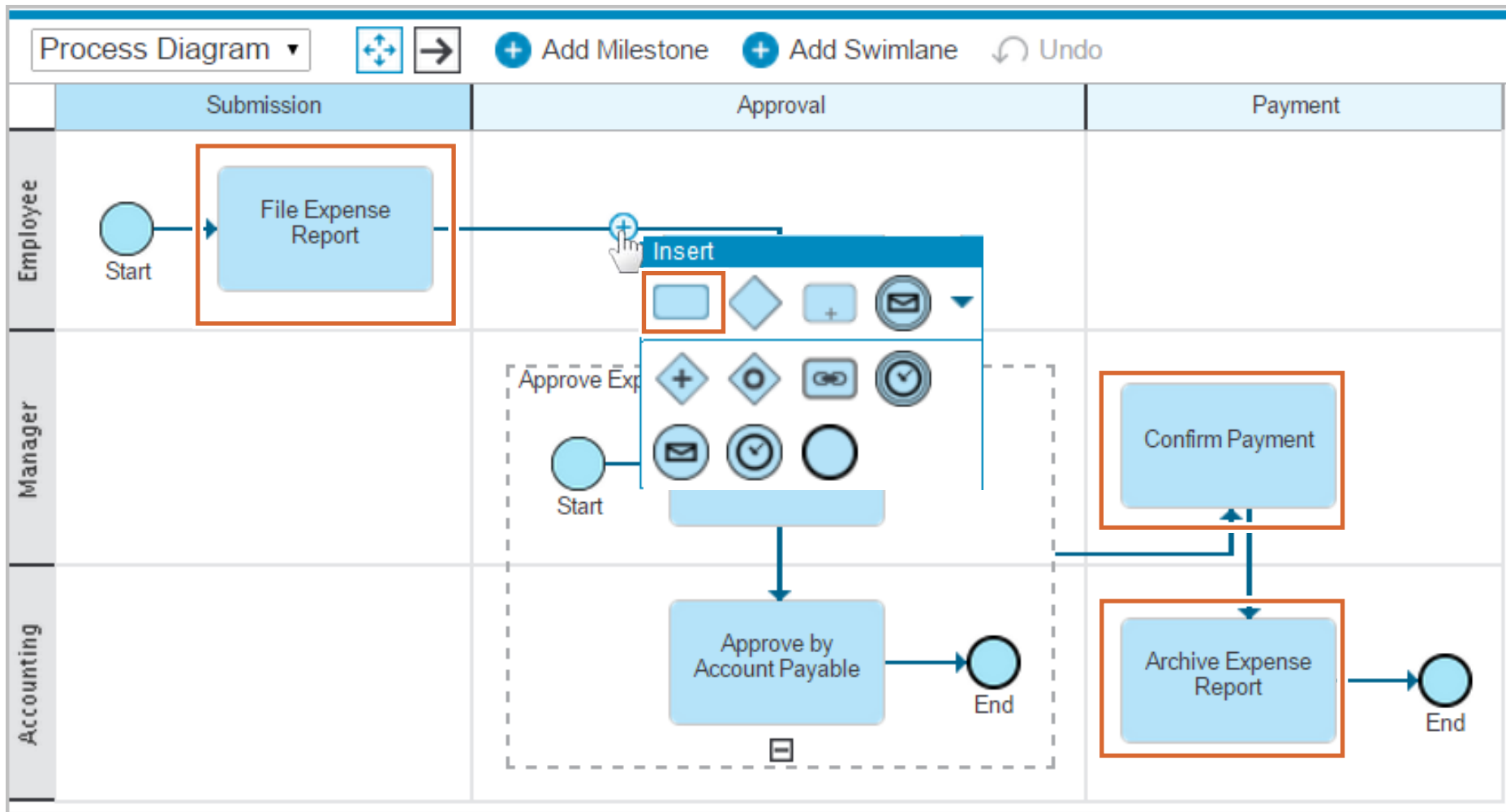
Pool



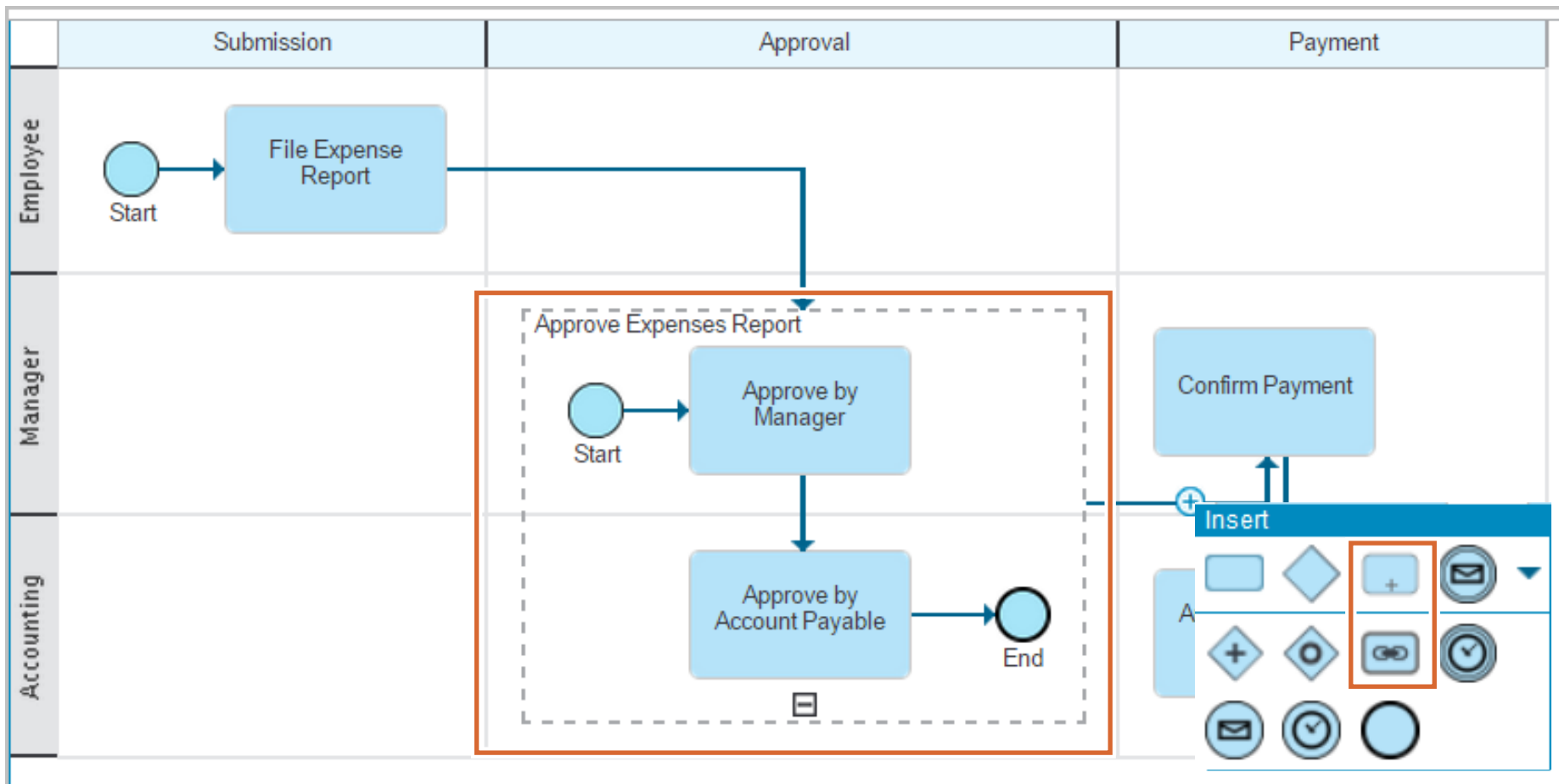
Lane



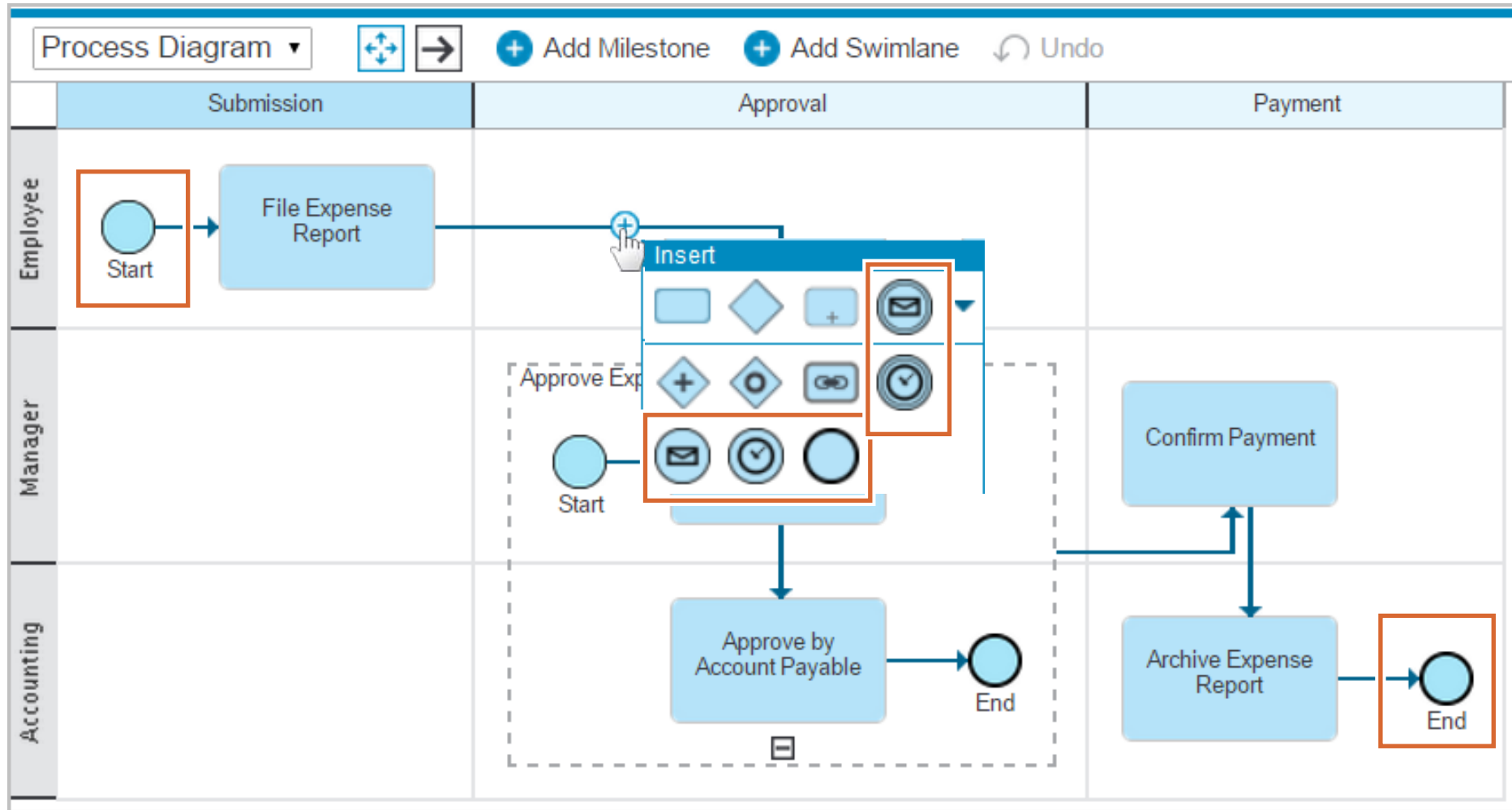
Activity



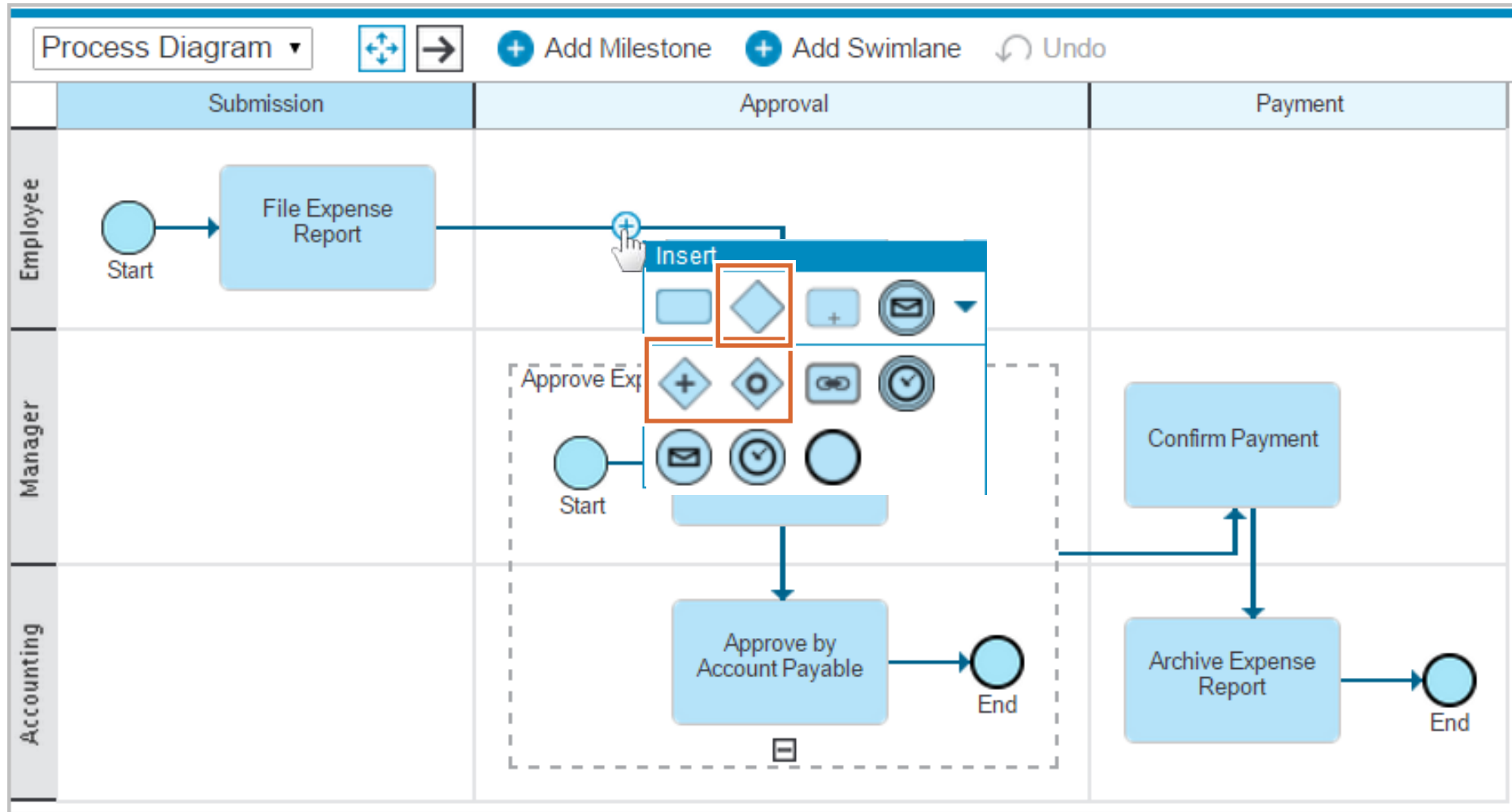
Activity: Subprocess and linked process



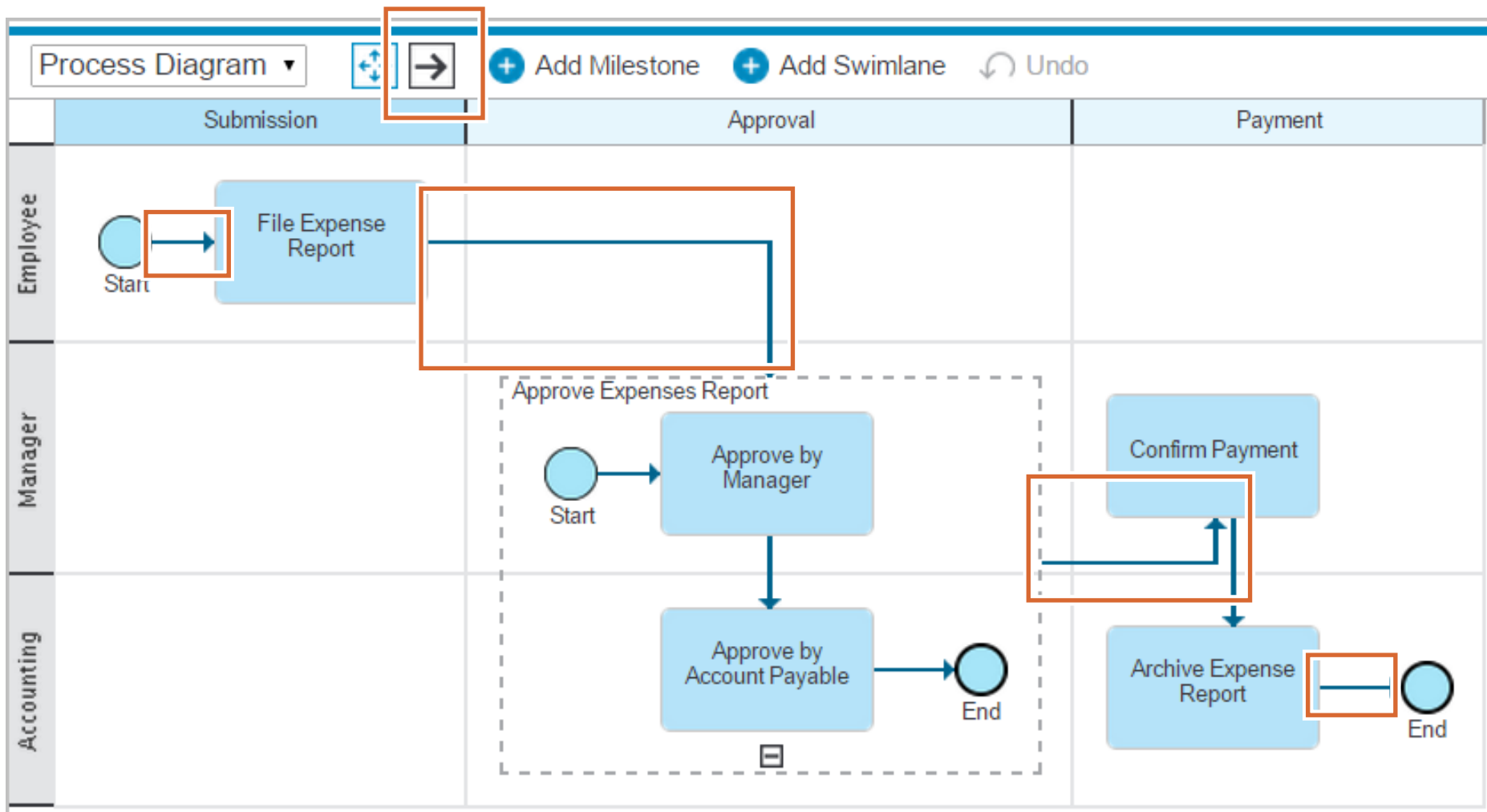
Event



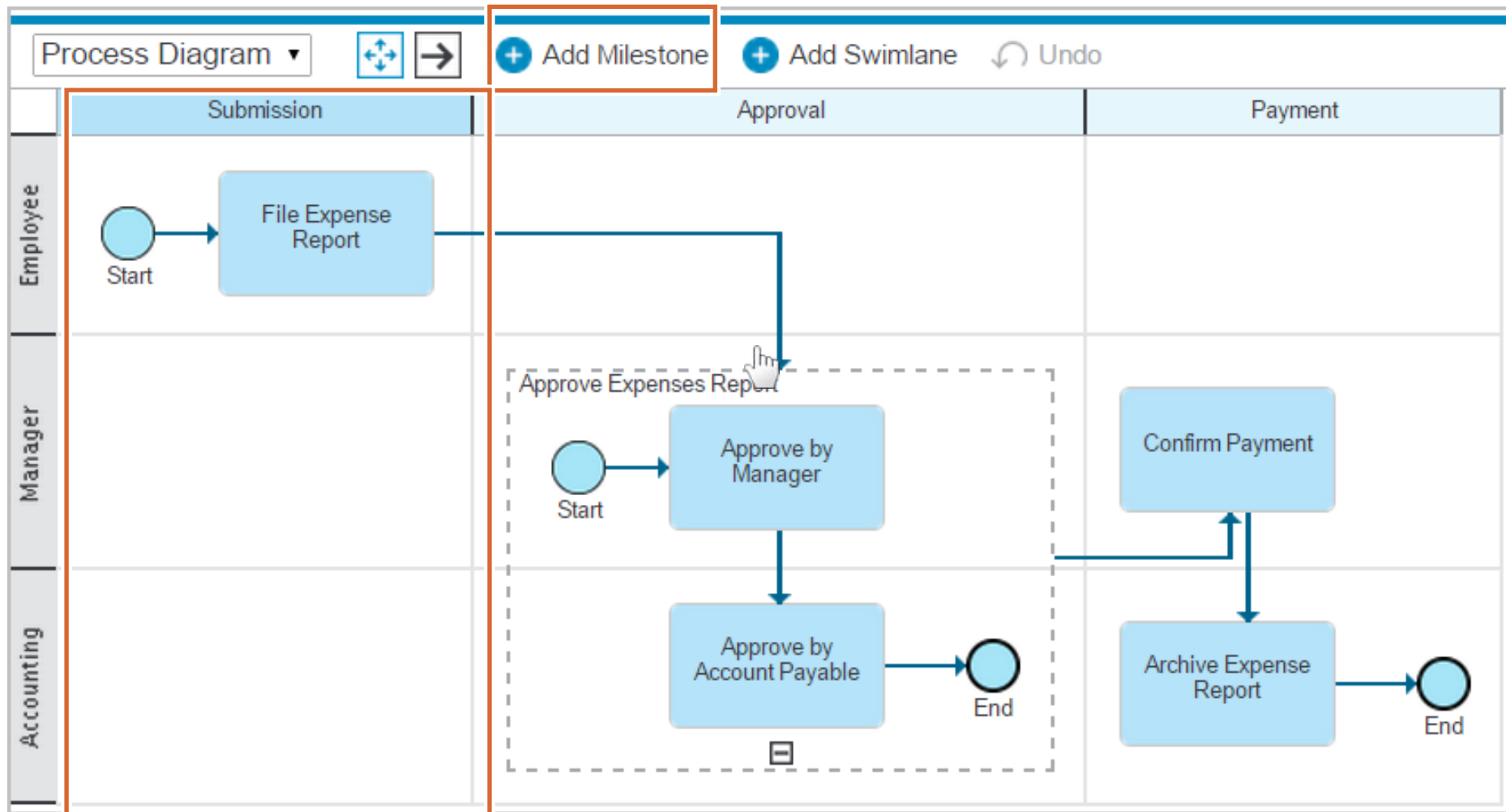
Gateway



Flow



Not a BPMN element: Milestone



Section recap

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

Modifying a process diagram

Topics

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



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 alternative paths to a process diagram



- Decision gateway: Process flow along only one possible answer

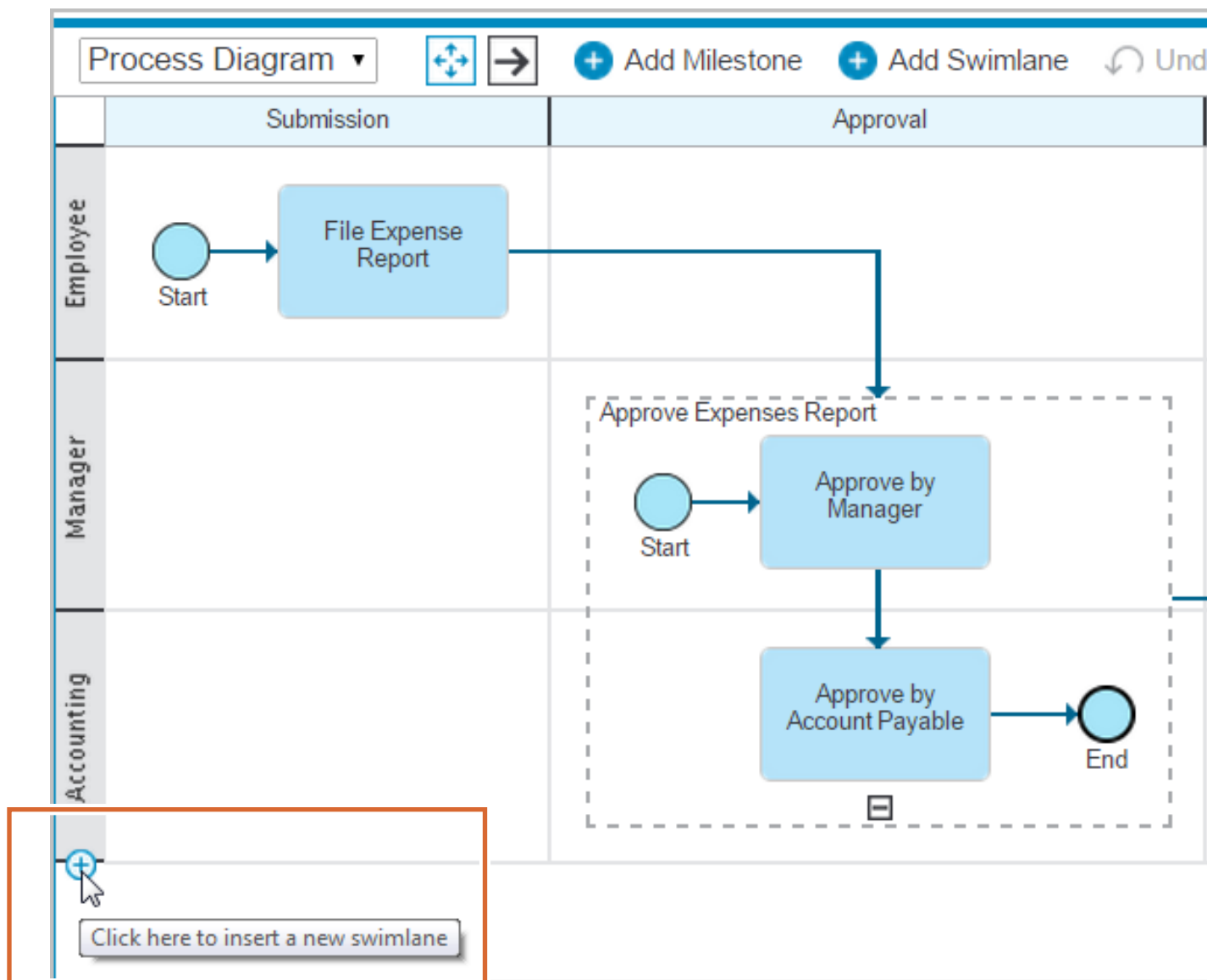


- Split gateway: Process flow along multiple answers

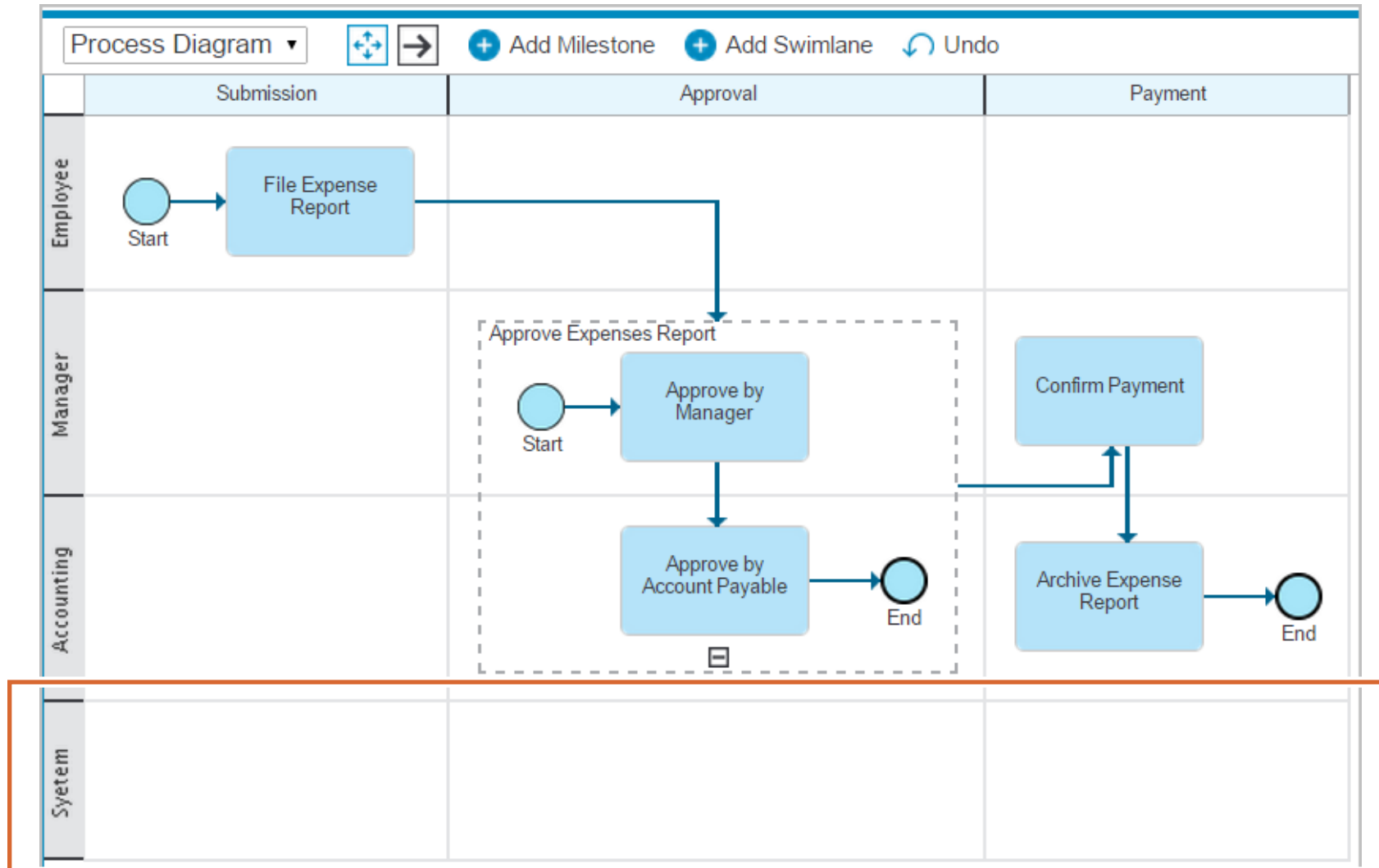


- Conditional split gateway: Process flow along one or more conditional answers

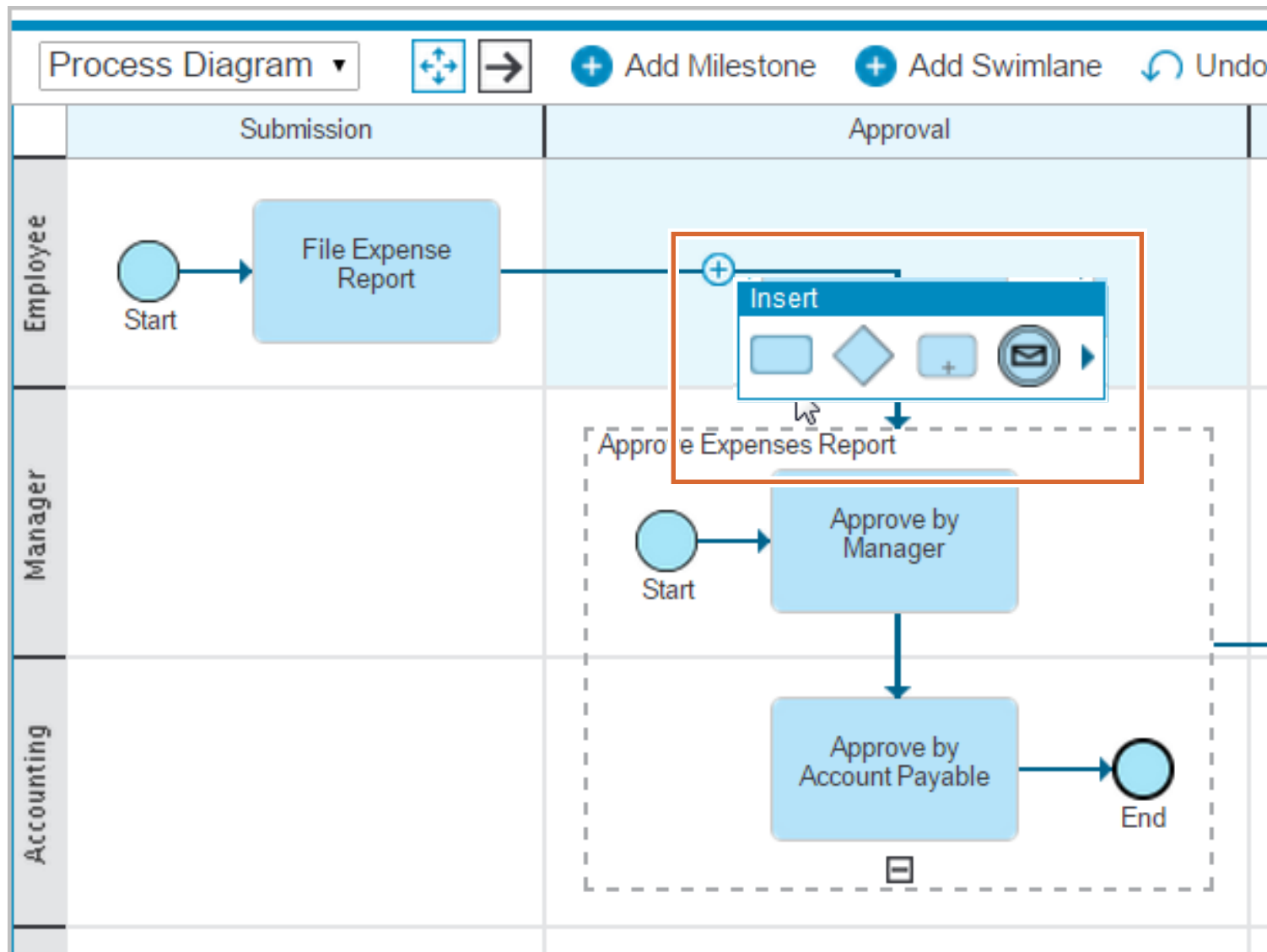
Alternative path example: Add a lane



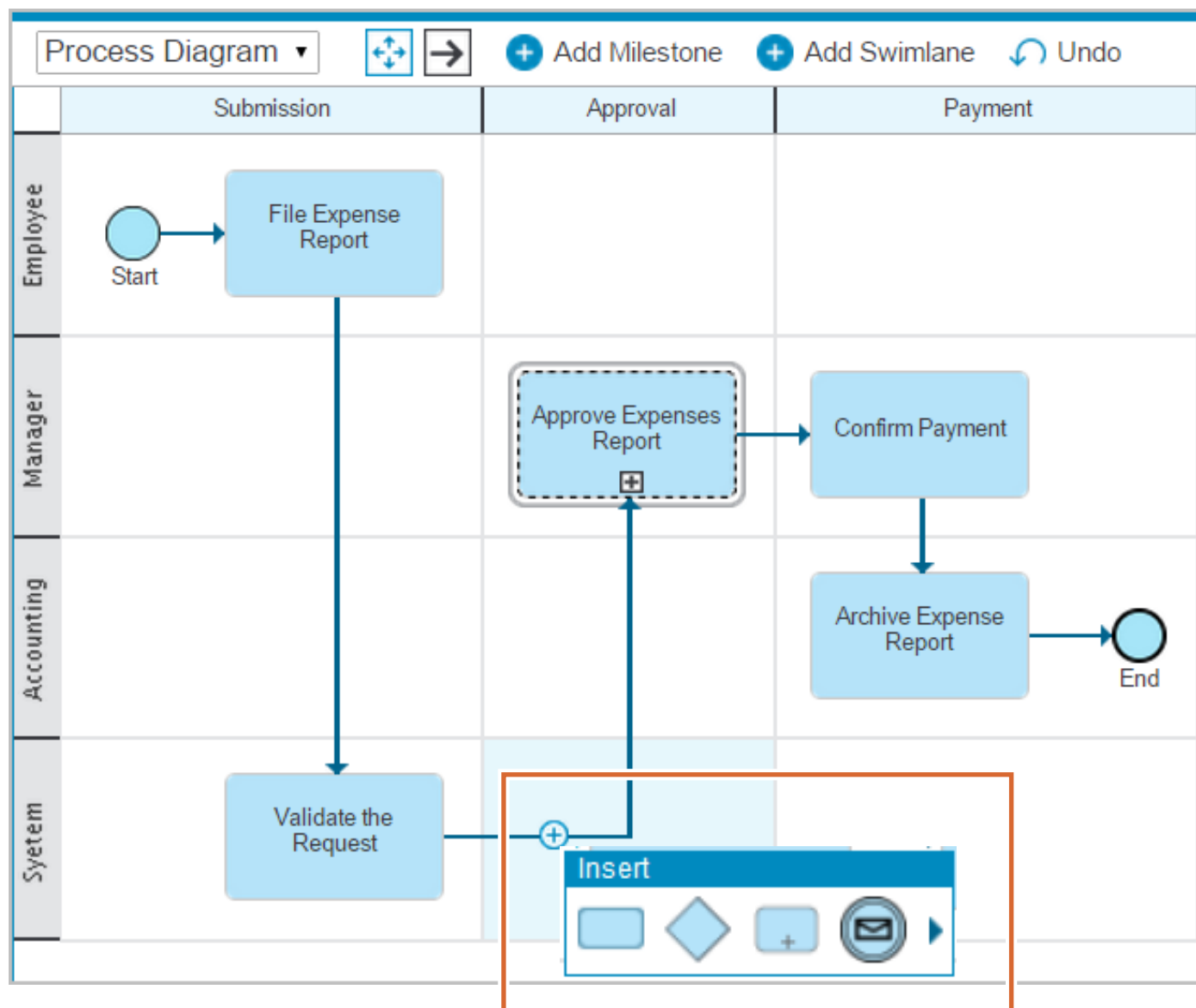
System lane



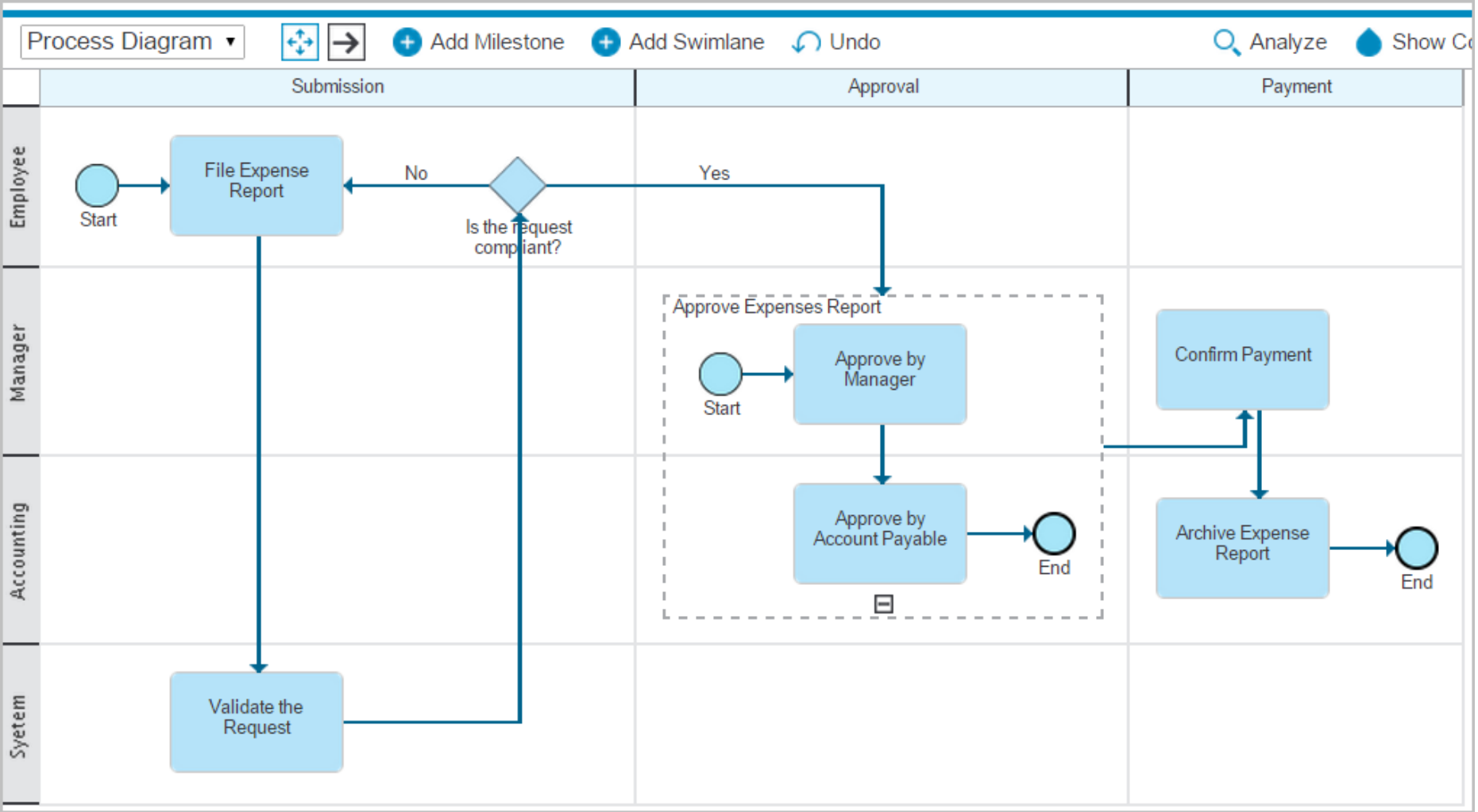
Alternative path example: Add an activity



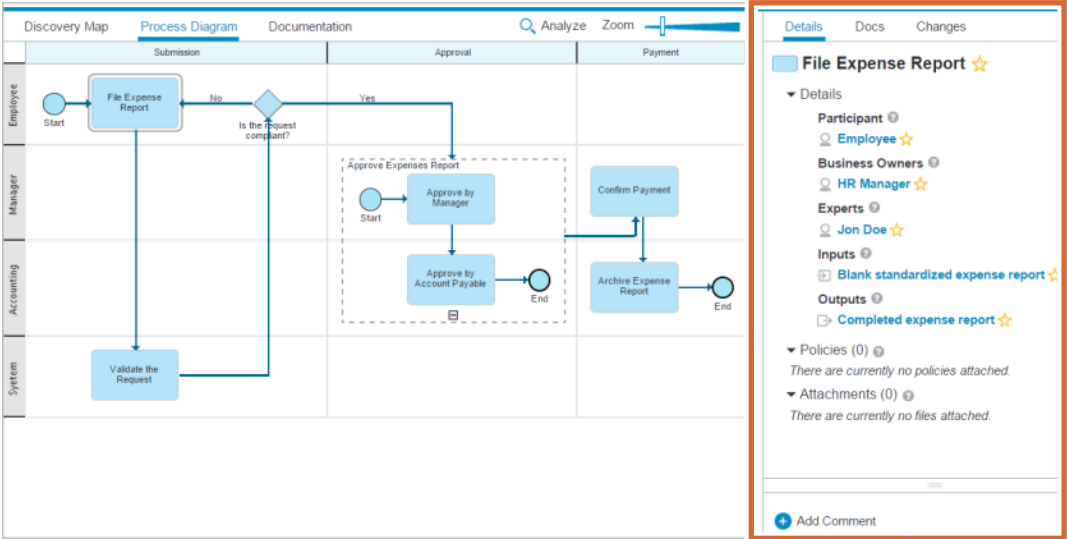
Alternative path example: Add a decision gateway



Expense reimbursement “as is” process model



Share a process diagram



Details
Docs
Changes

File Expense Report

Details

Participant
Employee

Business Owners
HR Manager

Experts
Jon Doe

Inputs
Blank standardized expense report

Outputs
Completed expense report

Policies (0)
There are currently no policies attached.

Attachments (0)
There are currently no files attached.

Add Comment

Section recap

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

Decision discovery

Topics

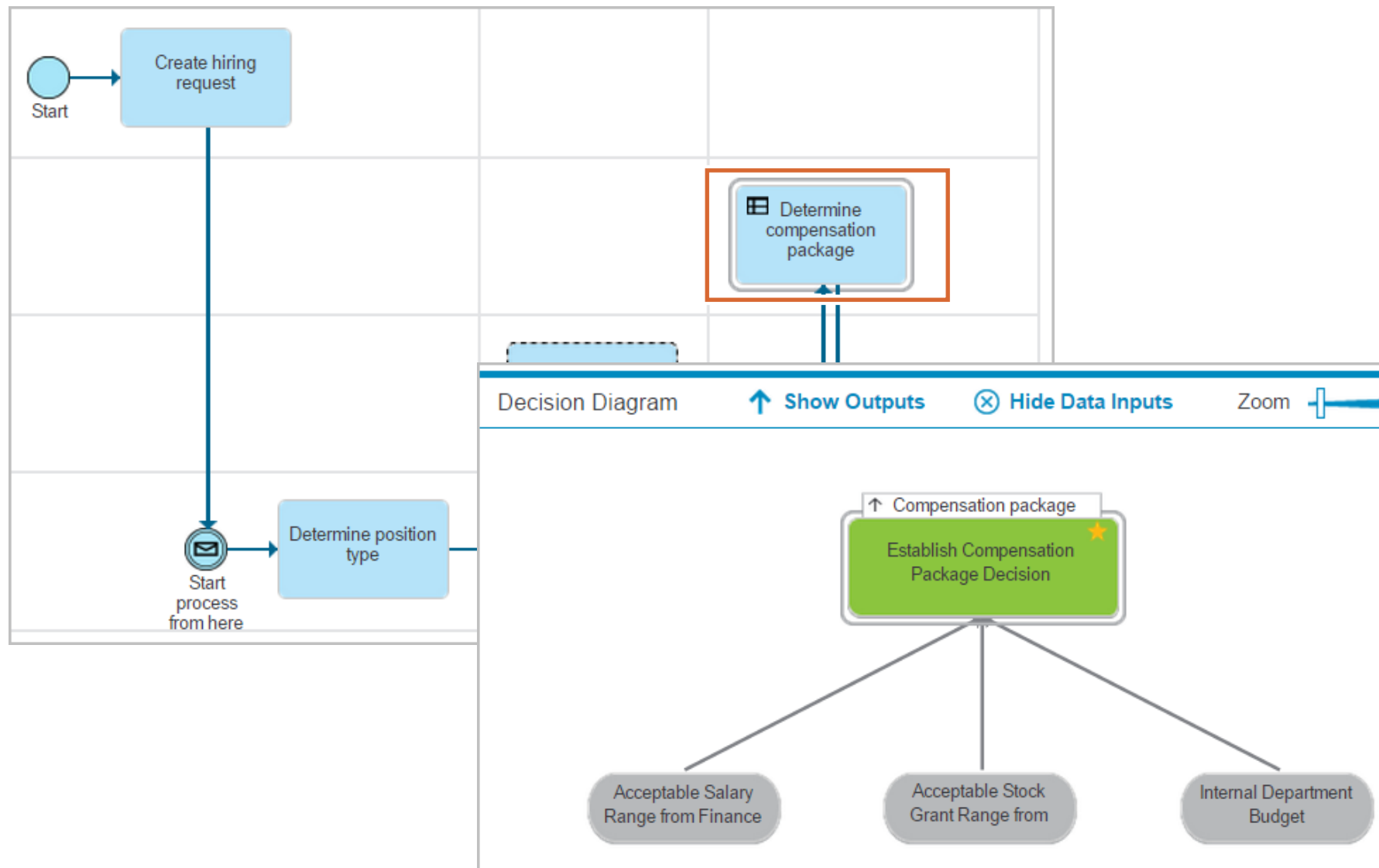
- IBM Blueworks Live process diagram
- Modifying a process diagram
- ▶ Decision discovery
 - Playback of a process diagram
 - Other features of Blueworks Live



Decision discovery with Blueworks Live

- Use Blueworks Live to discover and document the decisions within business processes.
- Decisions can be modeled graphically, enabling users to compose, view, and collaborate on decision diagrams.
- Key characteristics of decisions can be captured, and the decision logic that is documented by using decisions tables.
- Changes to decisions can be tracked, and previous versions of decisions restored.
- Decisions of interest can be easily located, along with the business processes that are using those decisions.
- You can share decision documentation by printing decision diagrams, exporting decision information to MS Word and MS Excel, and sharing links to decisions.

Decisions within business processes



Capturing key decision characteristics: Details

Establish Compensation Package Decision ★

Details

Decision

Policies

Attachments

Documentation

Comments

▼ Business Motivation ?

▼ Business Owners ?

▼ Experts ?

▼ Sources ?

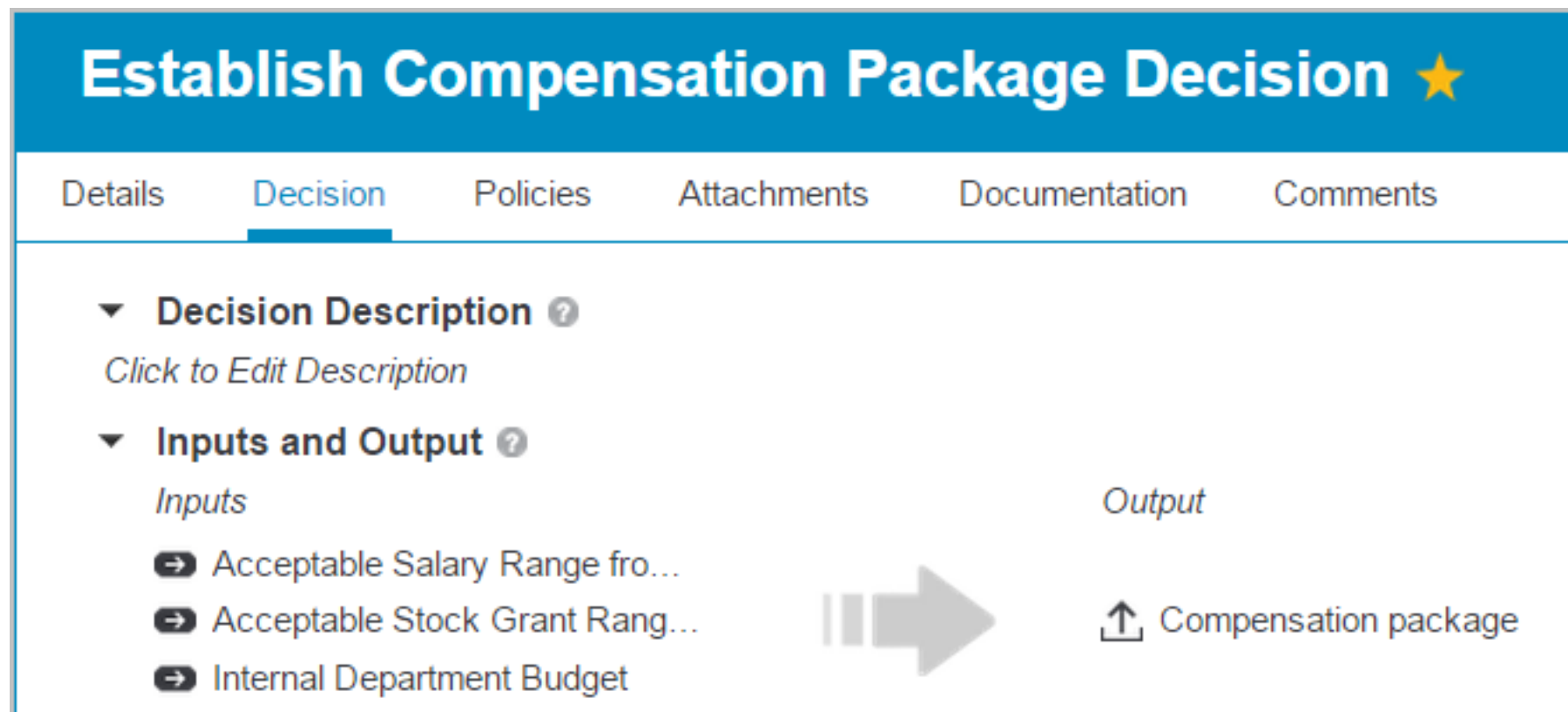
▼ Key Performance Indicators ?
 ★ + -

▼ How often is this decision made? ?
 Volume
Low

▼ How often is this decision updated? ?
 Frequency
Low

▼ How much time do you have to update the decision? ?
 Latency
Low

Capturing key decision characteristics: Decision (1 of 2)



Capturing key decision characteristics: Decision (2 of 2)

▼ Decision Table ?

Establish Compensation Package Decision

Considerations			Conclusions
Acceptable Salary Range from Finance	Acceptable Stock Grant Range from Finance	Internal Department Budget	Compensation package
		< Acceptable Salary Range from Finance	minimum salary in finance range, no stock grant
\$51k - \$75k	< 1000 shares	>\$50k	manager discretion within finance range
\$76k - \$100k	< 2000 shares	>\$76k	\$50k, no stock grant
> \$100k			requires executive approval
	> 2000 shares		requires executive approval

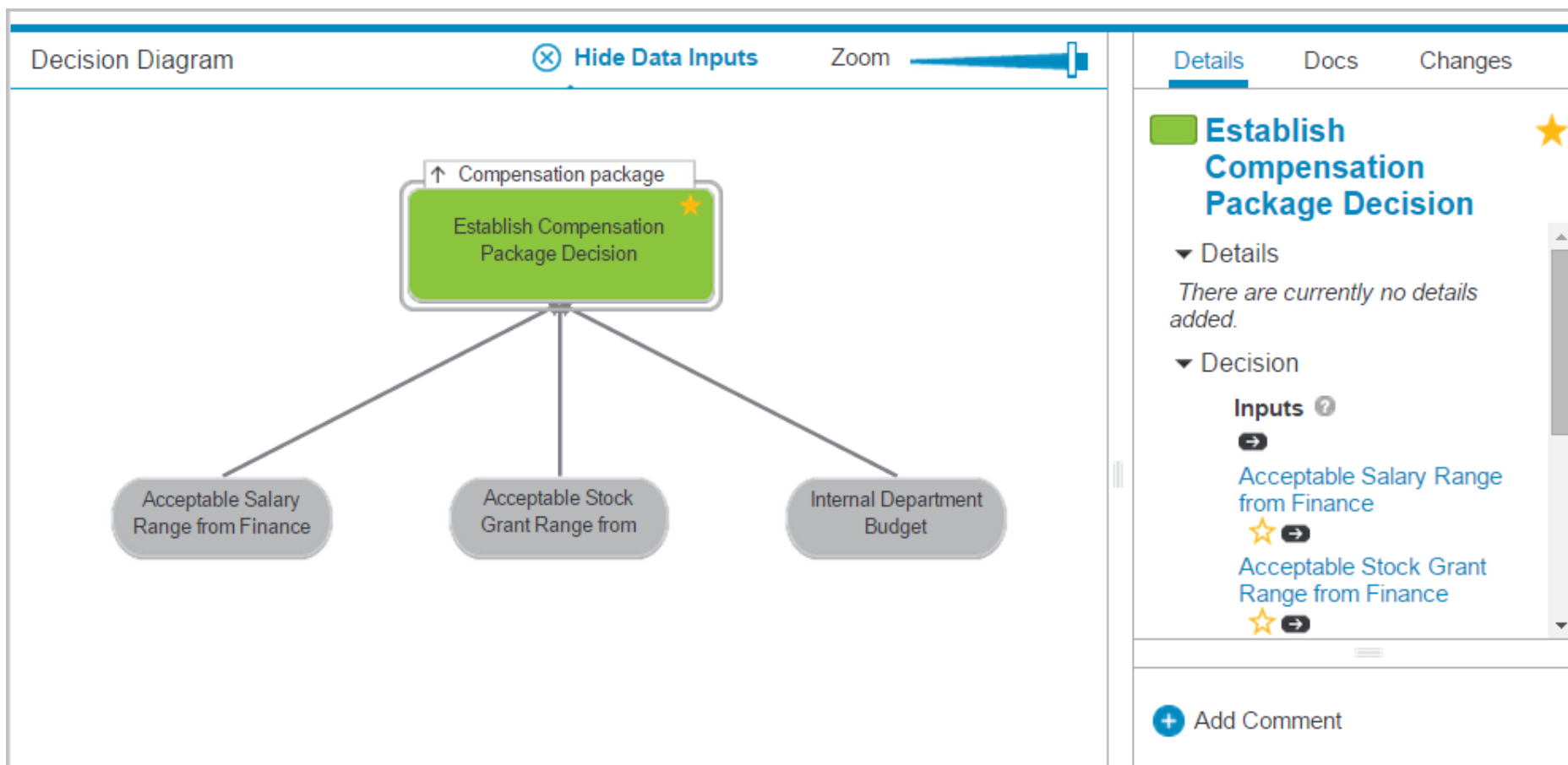
Exception Table 1

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

Composing a decision

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

Viewing a decision



Collaborating on decisions

All Spaces >

Training Space

education training

Edit Tags

Export Space

Overview

Users

Stats

Space Details

ACTIVITY STREAM

Date User

New Post

Today

You created a post 9:04 PM

Review the Training Space

The Training Space has been reviewed.

Add Comment

Thursday, December 18, 2014

You made 55 changes to Hiring Requisition process 10:04 PM

made 2 changes to Hiring Requisition process 6:29 PM

BWL Admin made 5 changes to Hiring Requisition process 10:45 AM

added Establish Compensation Package Decision decision to Determine compensation

Filter

Create New

Import

Active

Items (1)

Type Name Date Tag

Process Blueprints

1

Hiring Requisition

Last modified by BWL User2 on 30-Jan-2016

BWL Admin

BWL Admin: Have you reviewed the Training Space?

Press enter to send message

Send link to this page

Playback zero - Process Diagram

© Copyright IBM Corporation 2016

Validating decisions

BlueworksLive

WorkCommunityLibrary

work>
Process Blueprint Review: **Hiring Requisition** ☆

Related Artifact

↔ Establish Compensation Package Decision

Process Name


Hiring Requisition

Process Description and Location

The process of Hiring Requisition needs to be reviewed.

Attachment(s)

+ Add

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

-

Workflow Tasks

➡ Process started by BWL User2 on 30-Jan-2016 at 9:17 PM

Start

↳ BWL Admin Subject matter expert review

CompleteAdd Task

[Reassign this task to another user](#)

↳ BWL User1 Update process based on feedback

[Reassign this task to another user](#)

↳ BWL User2 Final review and approval

[Reassign this task to another user](#)




↳ BWL User2 Share process with Participants

[Reassign this task to another user](#)

End

Tracking changes to decisions

Establish Compensation Package Decision ▼ ★ ⓘ

 Work in Progress  Snapshots  End Edit

+ Add Sub-Decision + Add Data Input

↑ Compensation package

Establish Compensation Package Decision


Acceptable Salary Range from Finance

Acceptable Stock Grant Range from

Snapshots ?

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

☐ Hide System Snapshots

Today	
Current Version 	Current Version
<i>Current User</i>	Actions ▶
Older	
Initial Snapshot	30-Jan-2016 at 1:57 PM
<i>BWL User2</i>	Actions ▶
Autosnapshot	30-Jan-2016 at 12:02 PM
<i>BWL Admin</i>	Actions ▶
Autosnapshot	30-Jan-2016 at 12:01 PM
<i>BWL Admin</i>	Actions ▶

Finding and sharing decisions

The screenshot shows the BlueworksLive interface. The top navigation bar includes 'Work', 'Community', and 'Library'. Below it, a secondary navigation bar shows 'Spaces', 'Processes', 'Decisions' (selected), 'Policies', 'User Groups', and 'Glossary'. A dropdown menu is open for 'Decisions (1)', showing 'Active' and a star icon. The main content area displays a decision item: 'Establish Compensation Package Decision' with a star icon and a dropdown arrow. Below the title, it says 'Last modified by BWL Admin on [date]' and '+ Add Tags'. A context menu is open over the decision item, showing options: 'Export to Word', 'Export Decision', 'Move Item', 'Where Used' (highlighted by a mouse cursor), and 'Copy Decision'. A 'View Where Used' button is also visible next to 'Copy Decision'.

The screenshot shows a dialog box titled 'Where Used: Establish Compensation Package Decision'. The dialog has a blue header bar with a close button (X) and a refresh icon. Below the header, there are three tabs: '3 Spaces', '3 Processes', and '3 Activities' (selected). Under the '3 Activities' tab, there is a section titled 'Linked from' with a count of '3'. Below this, there is a list of activities:

- Activity activity in **Hiring Requisition**
- Determine compensation package activity in **Hiring Requisition**
- Establish Compensation Package activity in **Hiring - Onboarding**

Section recap

- The decision discovery capability of Blueworks Live is to discover and document the decisions within business processes.
- Decisions can be modeled graphically, enabling users to compose, view, and collaborate on decision diagrams.
- Key characteristics of decisions can be captured, and the decision logic that is documented by using decisions tables.
- Changes to decisions can be tracked, and previous versions of decisions restored.
- Decisions of interest can be easily located, along with the business processes that are using those decisions.
- You can share decision documentation by printing decision diagrams, exporting decision information to MS Word and MS Excel, and sharing links to decisions.

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

Exercise objectives

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

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



Playback of a process diagram

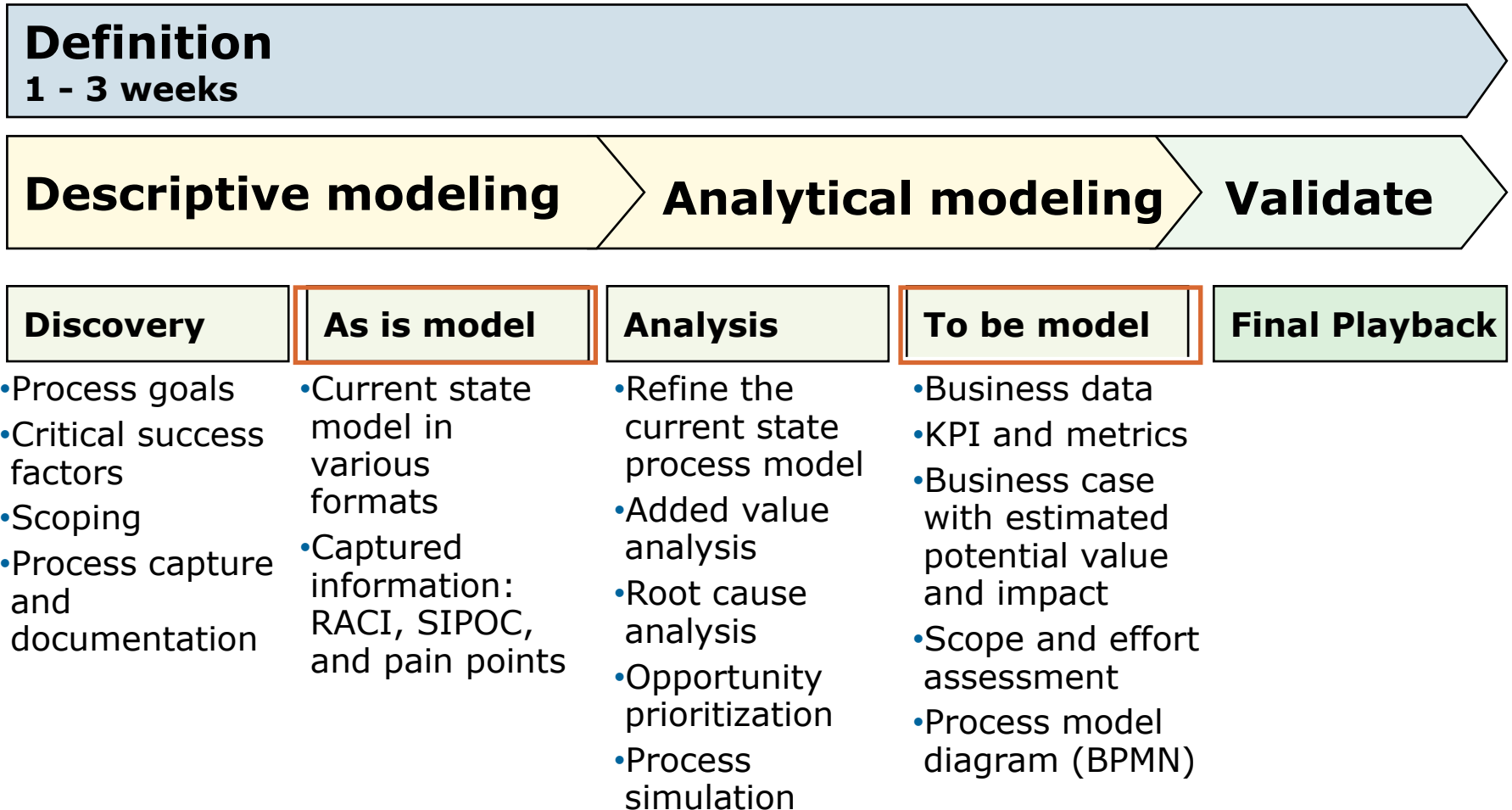
Topics

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

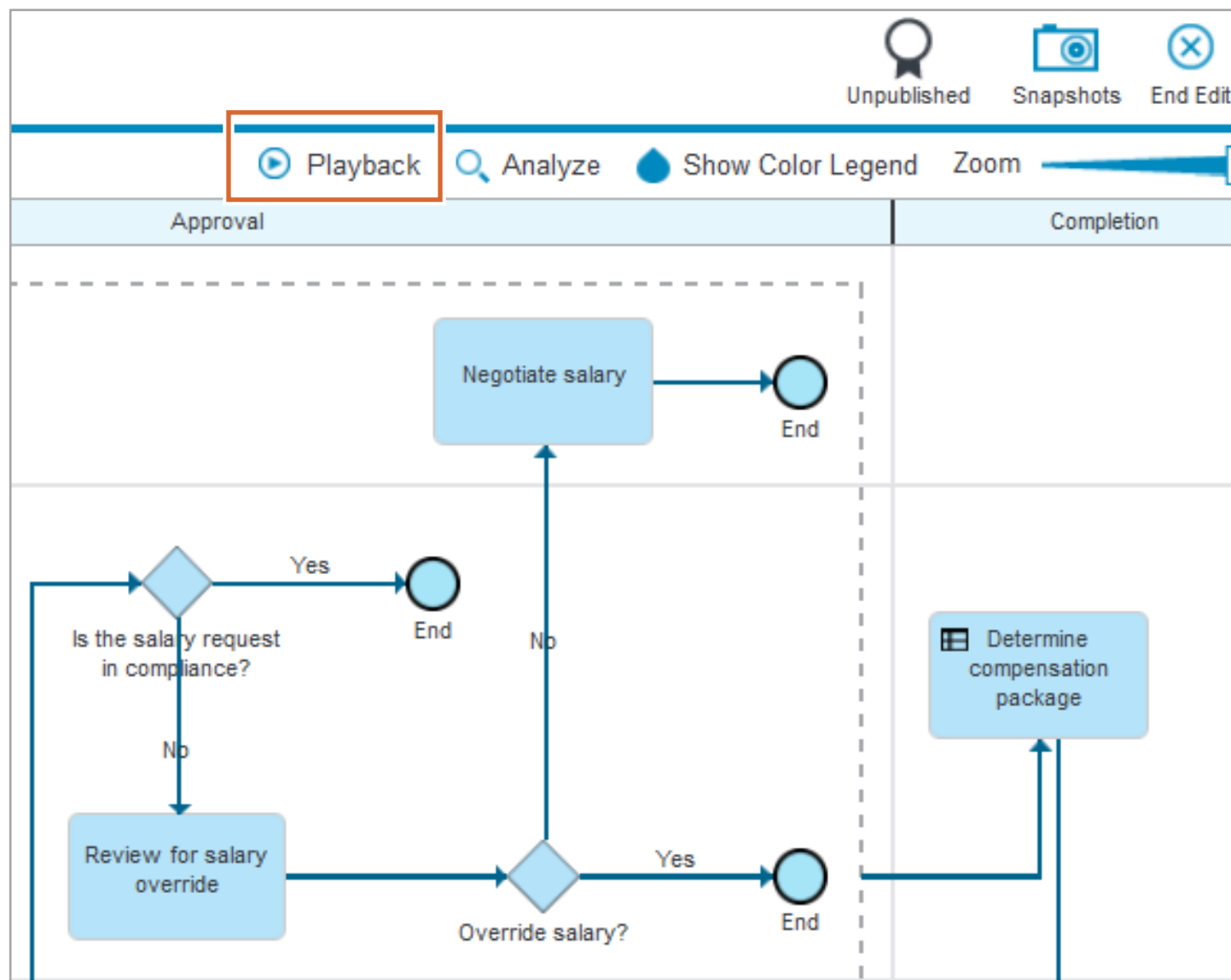


Overview

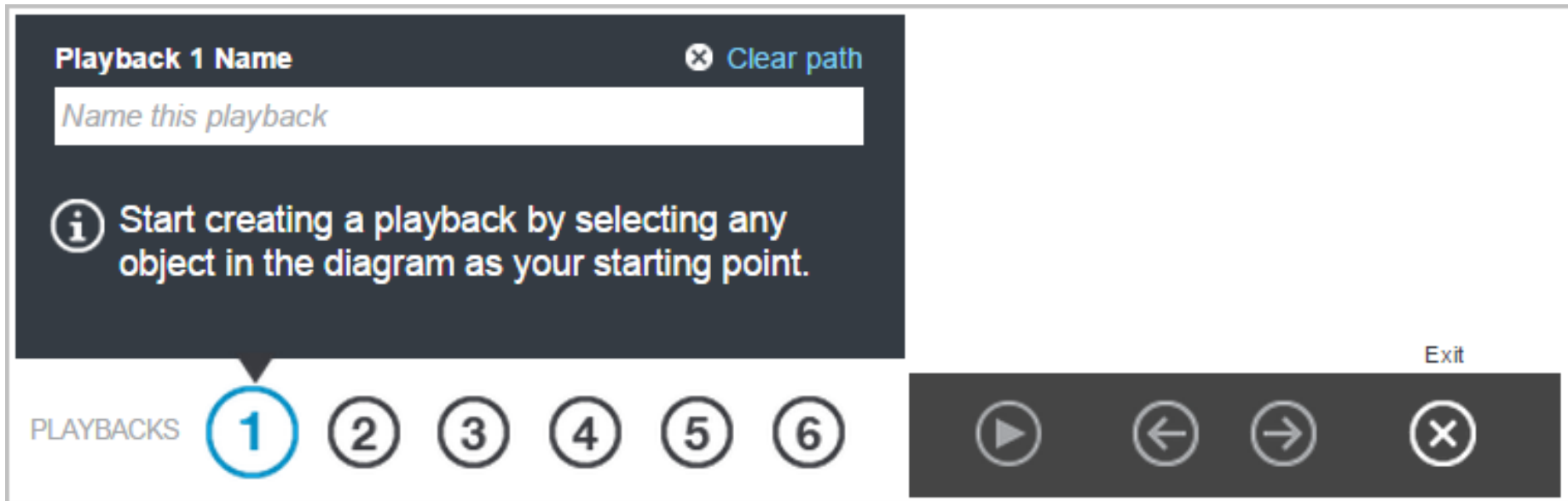
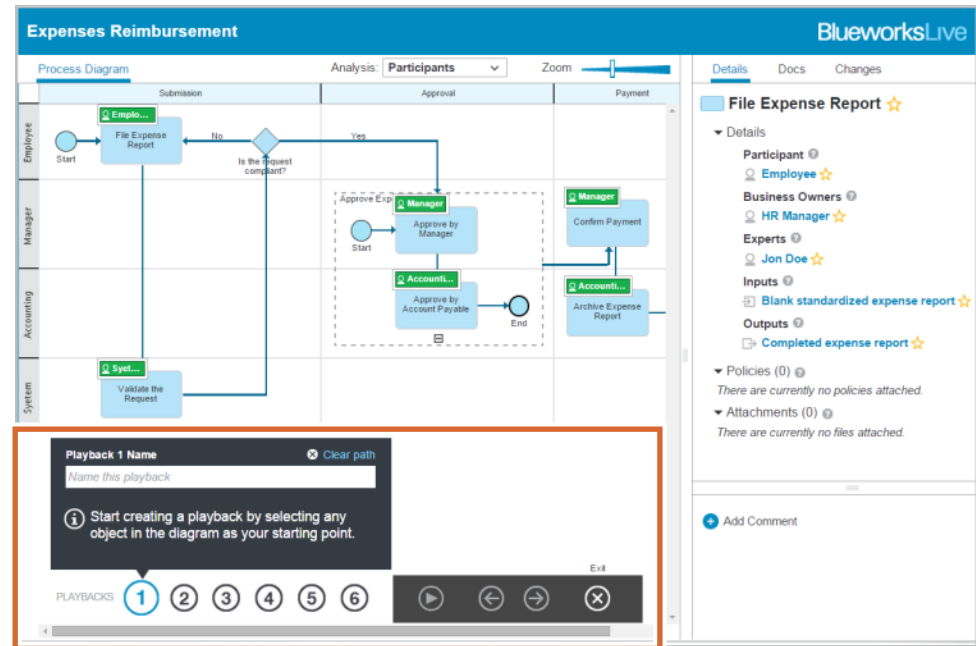
Playback zero



Conducting a Playback



Playback interface



Reviewing path 1 in the process diagram

Expenses Reimbursement

Blueworks

Process Diagram

Analysis: Participants

Zoom

Submission

Approval

Payment

Start

File Expense Report

Validate the Request

Is the request compliant?

Approve Exp

Approve by Manager

Approve by Account Payable

Manager

Accounting

Confirm Payment

Archive Expense Report

Manager

Accounting

Non compliant request

PLAYBACKS

1 2 3 4 5 6

Stop

Back

Replay

Exit

Details

Docs

Changes

Is the request compliant?

Details

There are currently no details added.

Policies (0)

There are currently no policies attached.

Attachments (0)

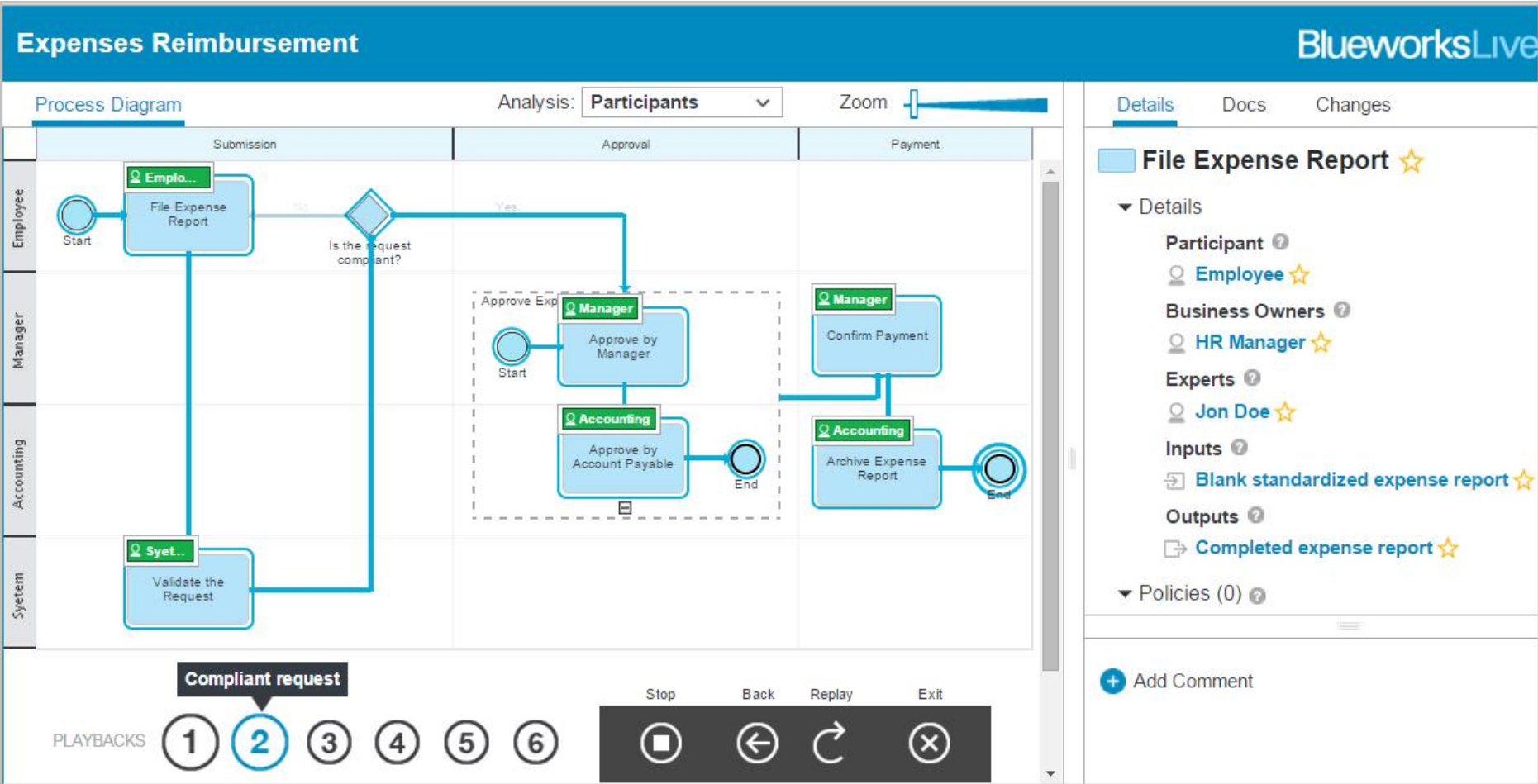
There are currently no files attached.

Add Comment

Playback zero - Process Diagram

© Copyright IBM Corporation 2016

Reviewing path 2 in the process diagram



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

Exercise objectives

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

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



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

Playback zero

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

Other features of Blueworks Live

Topics

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



Import Visio 2013 Diagrams

BlueworksLive BWL Admin Admin Help Logout

Work Community Library search

All Spaces > **Training Space** education training Edit Tags

Overview Users Stats

Space D

ACTIVITY S

Today

Yo Re

Import

Select the format you would like to import:

- ☒ **Microsoft Visio XML Diagram (.vdx or .vsdx)**
An XML-based format for diagrams.
- ☐ **Business Process Model and Notation (BPMN 2.0)**
An XML-based format for business processes from the OMG.
[More Details](#)
- ☐ **XML Process Definition Language (XPDL 2.1)**
An XML-based format for business processes from the WfMC.
[More Details](#)

Next

Create New + Import

Type Name Date Tag

2

ent ec 21, 2014

Governance with Blueworks Live

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

Defining

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

Workflow Tasks

Start

Task description	Task assigned to	Approval step	Task due date
↳ Subject matter expert review		<input type="checkbox"/>	<input type="text" value="2"/> + -
↳ Update process based on feedback		<input type="checkbox"/>	<input type="text" value="2"/> + -
↳ Final review and approval		<input checked="" type="checkbox"/>	<input type="text" value="2"/> + -
↳ Share process with Participants		<input type="checkbox"/>	<input type="text" value="2"/> + -

End

Launching (1 of 2)

The screenshot displays two overlapping windows from the IBM Training application. The foreground window, titled "Launch a Process App", has a blue header bar with a close button. It contains a section "Select a process to launch" with a dropdown menu labeled "Choose a process...". Below the dropdown is a search bar and a list of process examples: "Document Review in Process Examples", "Process Blueprint Review in Process Examples" (highlighted with a mouse cursor), and "Simple Checklist in Process Examples". The background window shows the "Snapshots" panel, which includes a "Snapshots" button, an "End Edit" button, and a text input field for creating snapshots. It also features a "Hide System Snapshots" checkbox and a table with columns for "Today", "Current Version", and "Actions". The "Actions" column for the "Current Version" row is highlighted, showing a dropdown menu with options "Launch a Process App" (highlighted with a red box) and "Publish".

Launch a Process App

Select a process to launch

Choose a process...

Document Review
in Process Examples

Process Blueprint Review
in Process Examples

Simple Checklist
in Process Examples

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

Actions

Launch a Process App

Publish

Launching (2 of 2)

BlueworksLive

WorkCommunity

User 2AdminHelpLogout

search

My Processes>

Process Blueprint Review

Workflow Tasks

Start

Task description

Subject matter expert review

Task assigned to

User 2

Approval step

☐

Task due date

2016-03-08

2

+

Update process based on feedback

User 2

☐

2016-03-10

2

+

Final review and approval

User 2

☐

2016-03-14

2

+

Share process with Participants

User 2

☐

2016-03-18

2

+

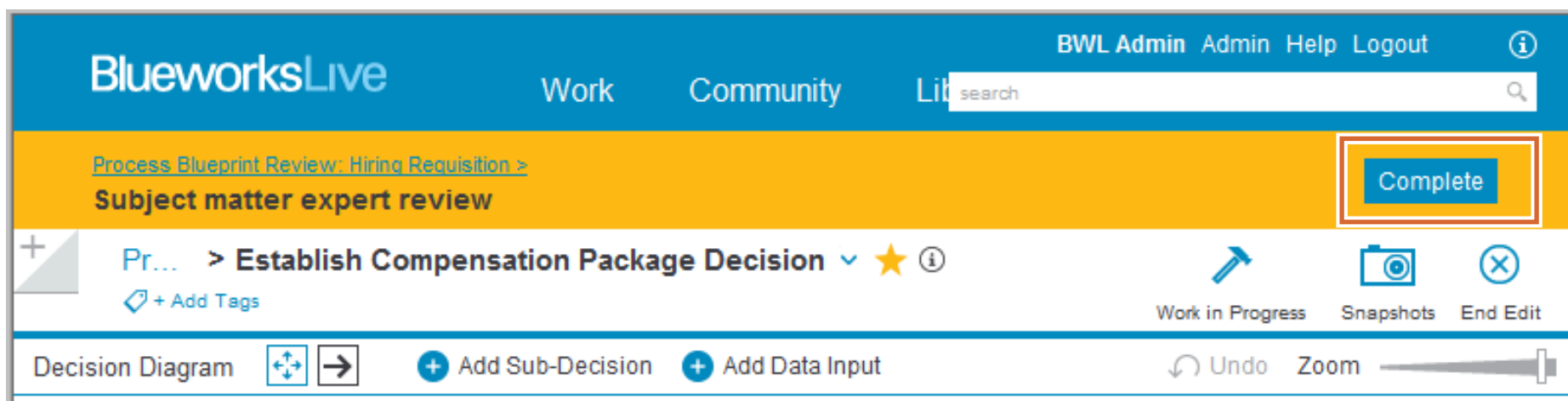
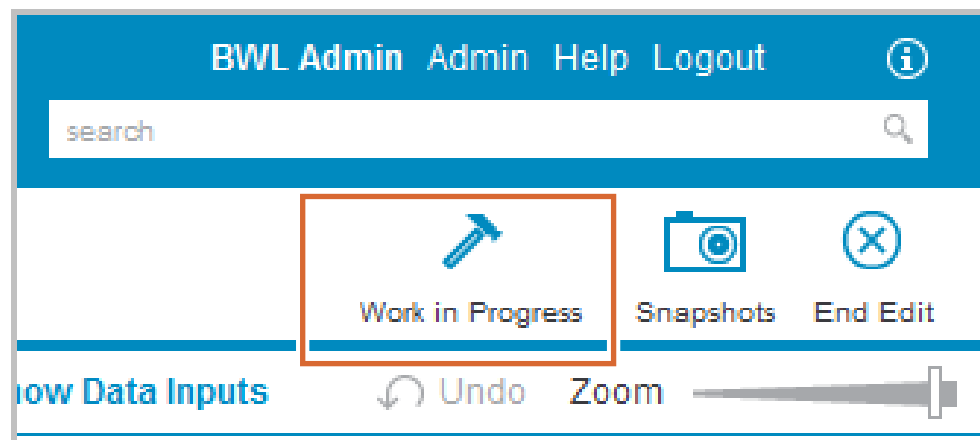
End

☒ Email me when this process is completed or cancelled.

Launch

Clicking launch will start the process and send out task assignment notifications.

Participating (1 of 2)



Participating (2 of 2)

The screenshot displays the BlueworksLive user interface. At the top, a blue header bar contains the 'BlueworksLive' logo, navigation links for 'Work' and 'Community', a search bar, and user information for 'BWL User2' with 'Help' and 'Logout' links. Below the header, a yellow banner indicates the current step: 'Process Blueprint Review: Hiring Requisition > Final review and approval'. In the top right corner of this banner, 'Approve' and 'Reject' buttons are highlighted with a red rectangle. The main content area shows a breadcrumb trail 'Pr... > Establish Compensation Package Decision' followed by a star icon and an information icon. Below the breadcrumb is a '+ Add Tags' link. On the right side of the main area, three icons represent 'Work in Progress' (hammer), 'Snapshots' (camera), and 'End Edit' (X). At the bottom, a toolbar includes 'Decision Diagram' with pan and zoom icons, 'Add Sub-Decision' and 'Add Data Input' buttons, and 'Undo' and 'Zoom' controls with a slider.

BlueworksLive Work Community search

BWL User2 Help Logout

[Process Blueprint Review: Hiring Requisition >](#)

Final review and approval

Approve Reject

Pr... > Establish Compensation Package Decision ★ ⓘ

+ Add Tags

Work in Progress Snapshots End Edit

Decision Diagram Add Sub-Decision Add Data Input Undo Zoom

Publishing

The screenshot displays the BlueworksLive web application interface. The top navigation bar includes the BlueworksLive logo, 'Work' and 'Community' tabs, a search bar, and user information for 'BWL User2' with links for 'Help' and 'Logout'. The main header shows the current project path 'Pr... > Establish Compensation Package Decision' with a star icon and an information icon. Below this, there are icons for '+ Add Tags', 'Work in Progress', 'Snapshots', and 'End Edit'.

The central area shows a 'Decision Diagram' with a green box labeled 'Establish Co Package' and a callout '3 →'. A 'Snapshots' dialog box is open, providing instructions: 'Type a description and press 'Enter' to create a snapshot. Press 'Esc' or click away to cancel.' The dialog includes a 'Snapshot' text input field, a 'Hide System Snapshots' checkbox, and a table of snapshots.

Today	
Current Version	Current Version
Current User	Actions
Older	
Initial Snapshot	Dec 18, 2014
BWL User2	Actions
Autosnapshot	Dec 18, 2014
BWL Admin	Actions

A secondary context menu is visible over the 'Autosnapshot' row, containing the options 'Launch a Process App' and 'Publish', with the 'Publish' option highlighted by a red rectangle.

Section recap

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

Learn more about Blueworks Live and process modeling

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

Unit summary

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



Review questions



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

Review answers



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

The answer is True.

2. Which of the following standards provides the graphical notation of a business process that is readily understandable by all?

- A. Business Process Management and Notation (BPMN)
- B. Business Process Model and Names (BPMN)
- C. Business Process Model and Notation (BPMN)
- D. Business Process Management and Modeling (BPMM)

The answer is C.

3. Which of the following elements is not a BPMN element?

- A. Gateway
- B. Activity
- C. Flow
- D. Milestone

The answer is D.