Playback zero - Process Diagram

© Copyright IBM Corporation 2016
Course materials may not be reproduced in whole or in part without the prior written permission of IBM.

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

© Copyright IBM Corporation 2016

IBM Blueworks Live process diagram

© Copyright IBM Corporation 2016

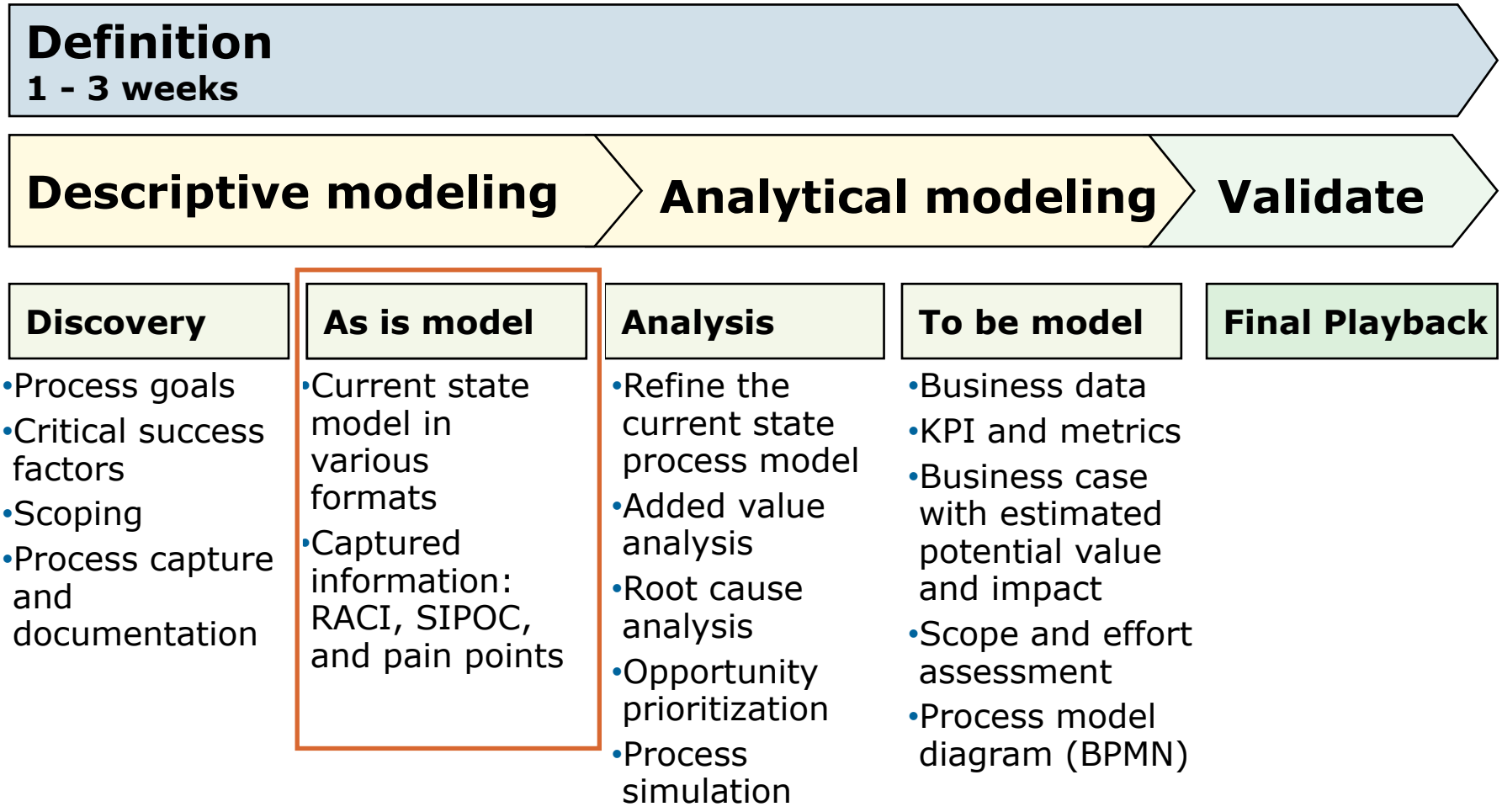
Topics

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

© Copyright IBM Corporation 2016

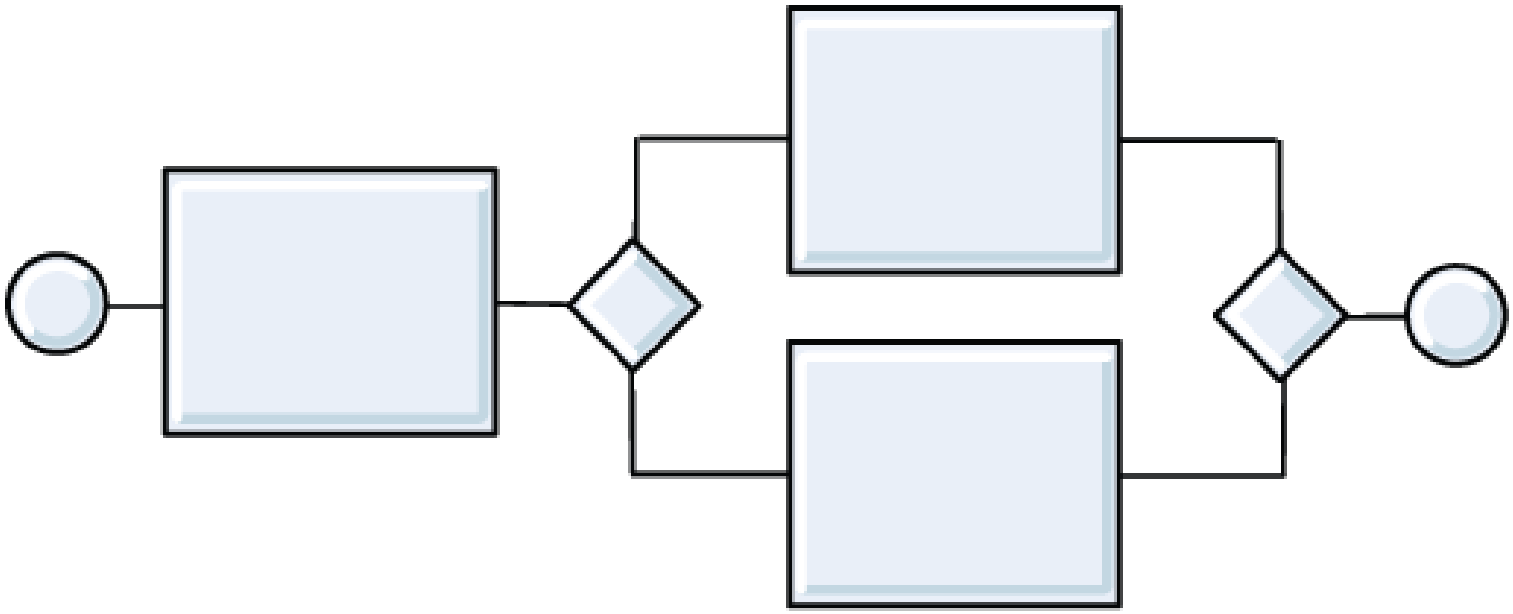
Overview

Playback zero



© Copyright IBM Corporation 2016

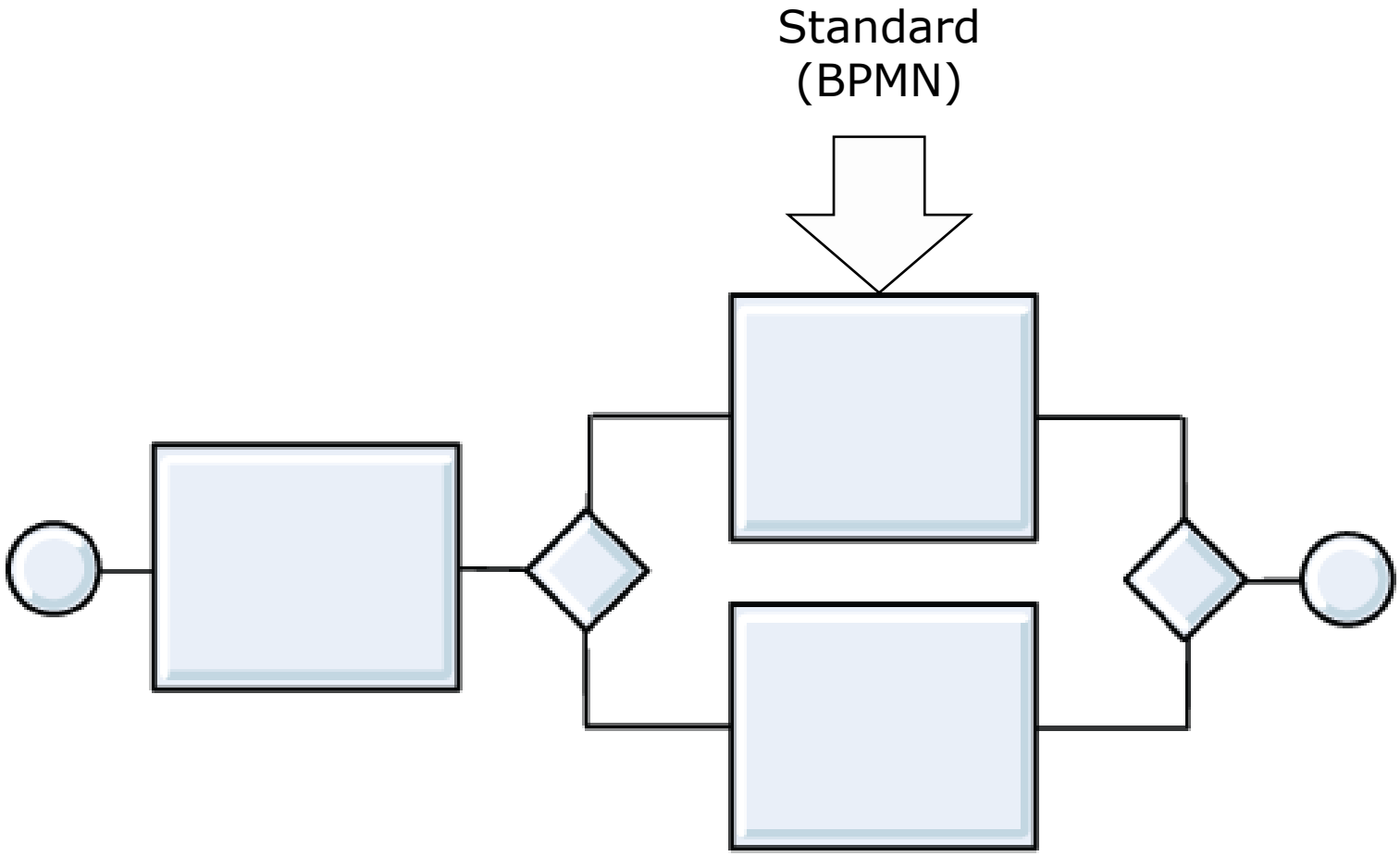
What is a process model?



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

© Copyright IBM Corporation 2016

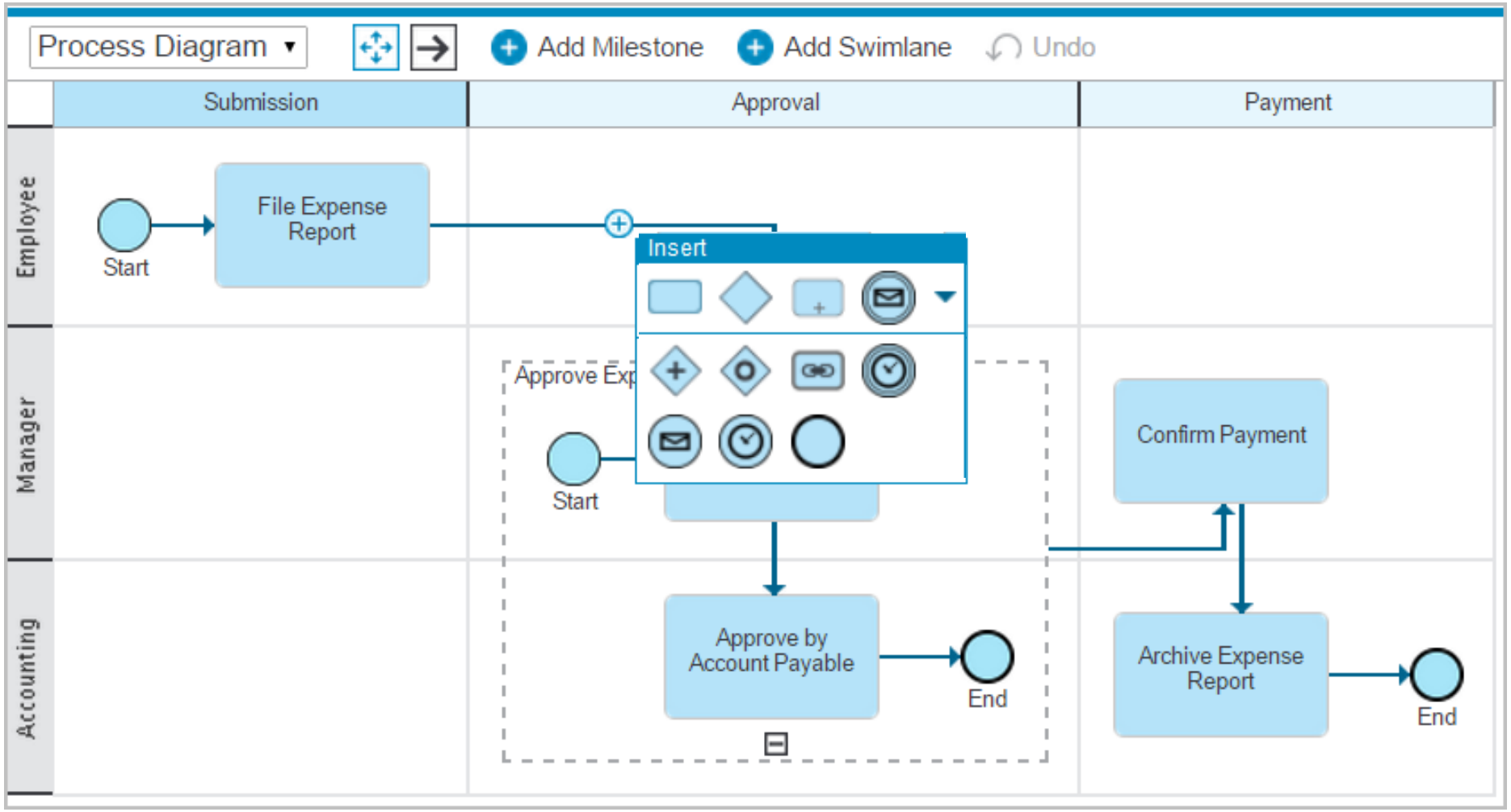
Business Process Model and Notation (BPMN)



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

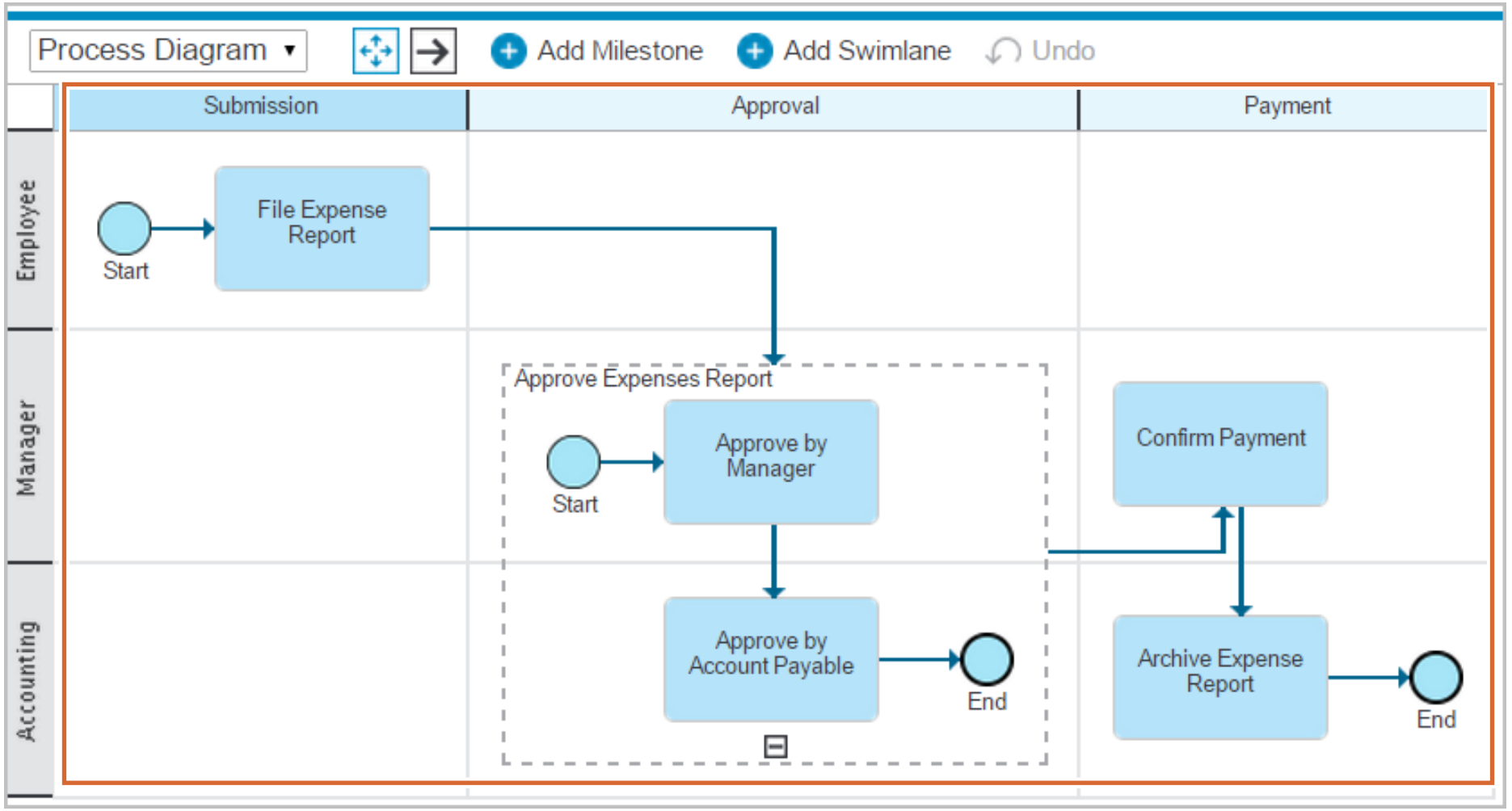
© Copyright IBM Corporation 2016

Process diagram BPMN core elements



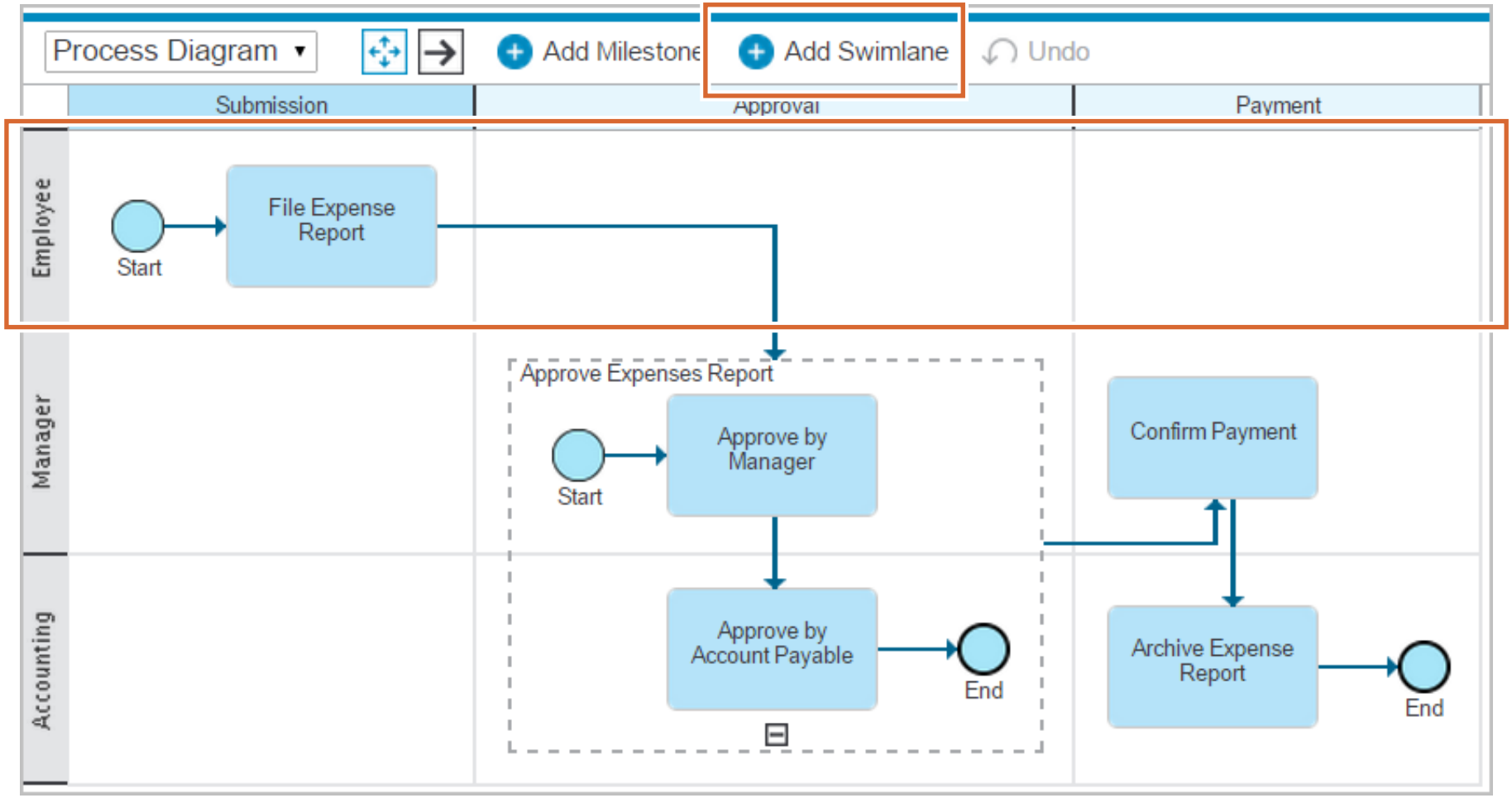
© Copyright IBM Corporation 2016

Pool



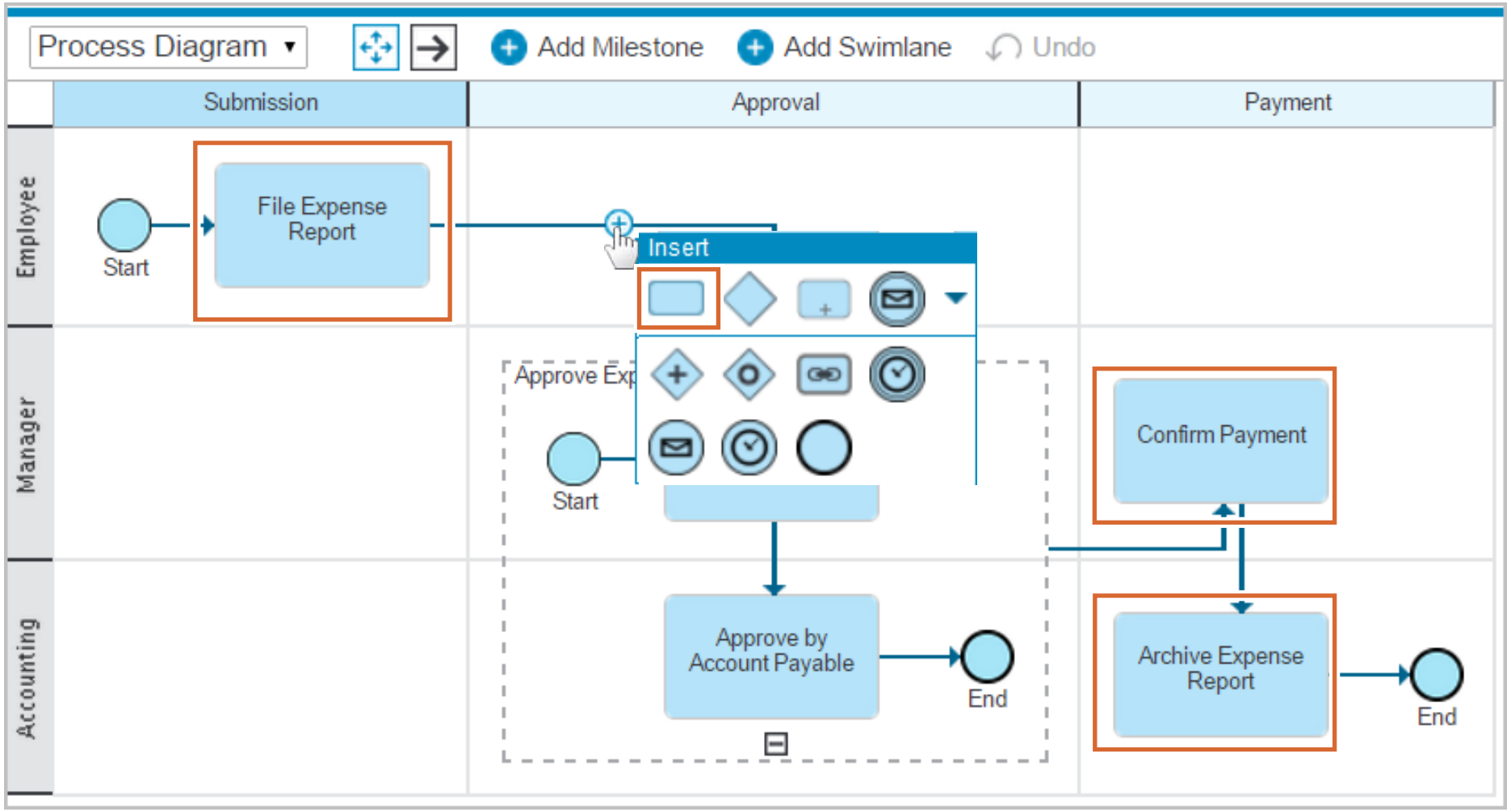
© Copyright IBM Corporation 2016

Lane



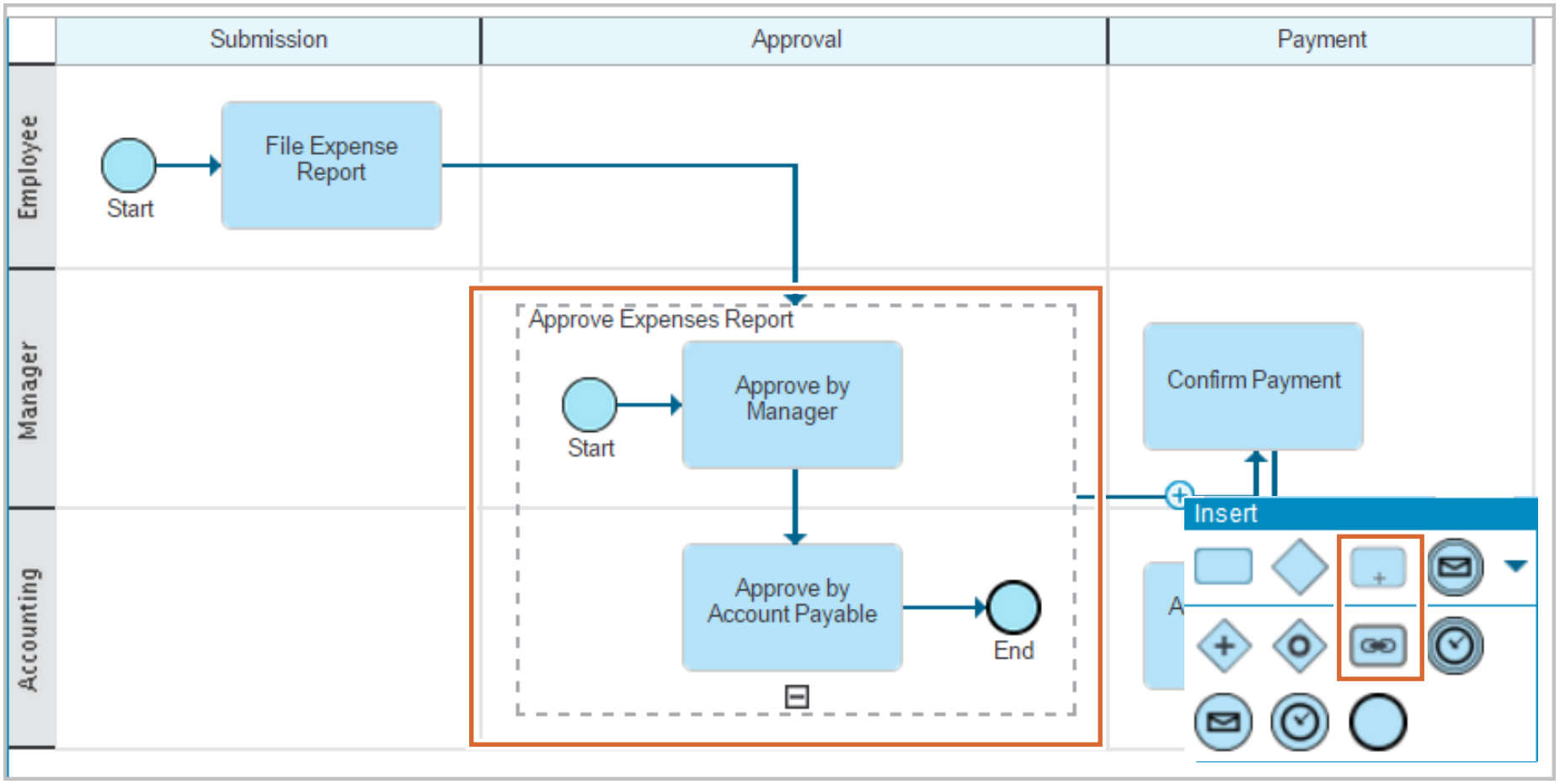
© Copyright IBM Corporation 2016

Activity



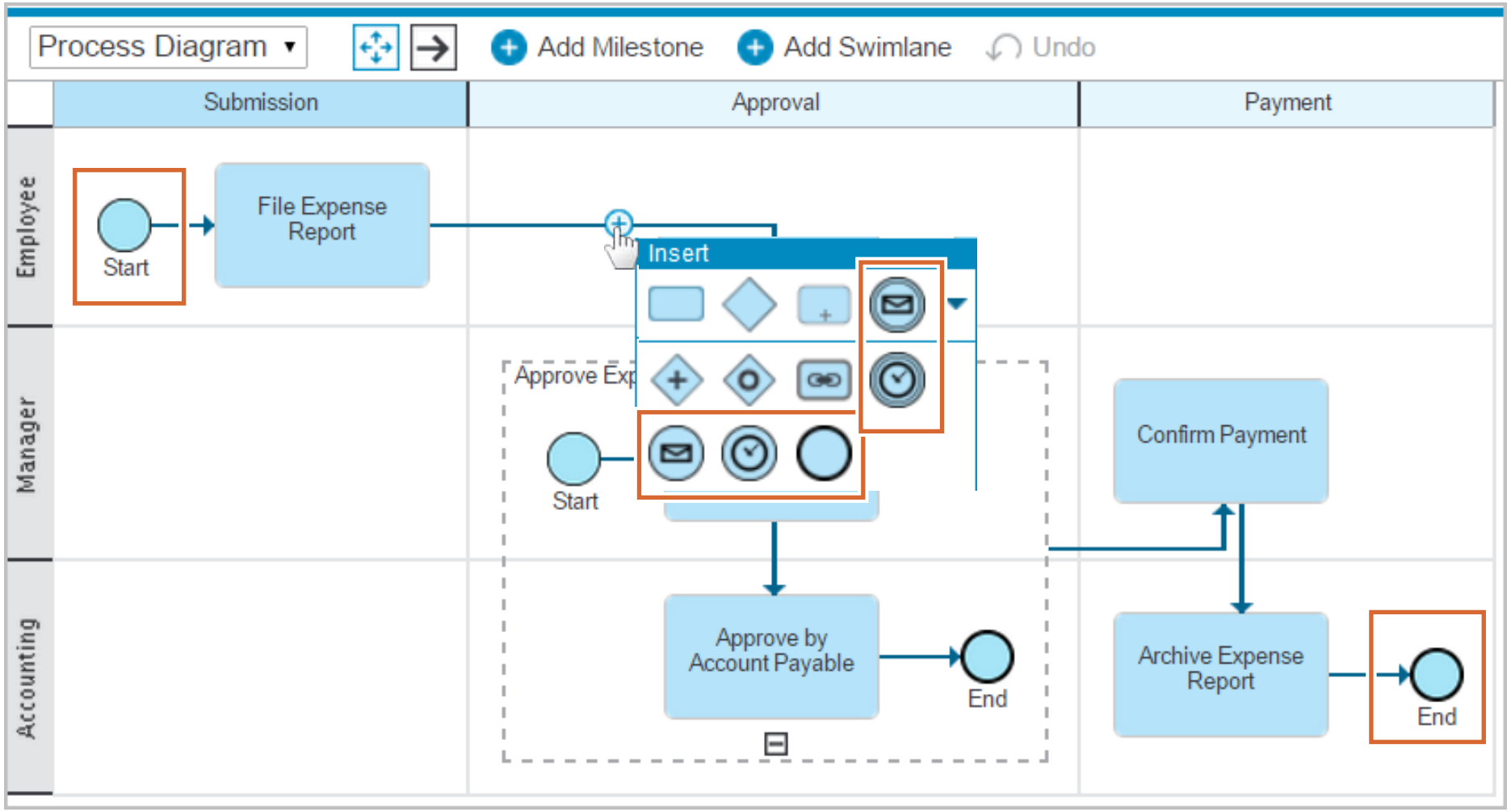
© Copyright IBM Corporation 2016

Activity: Subprocess and linked process



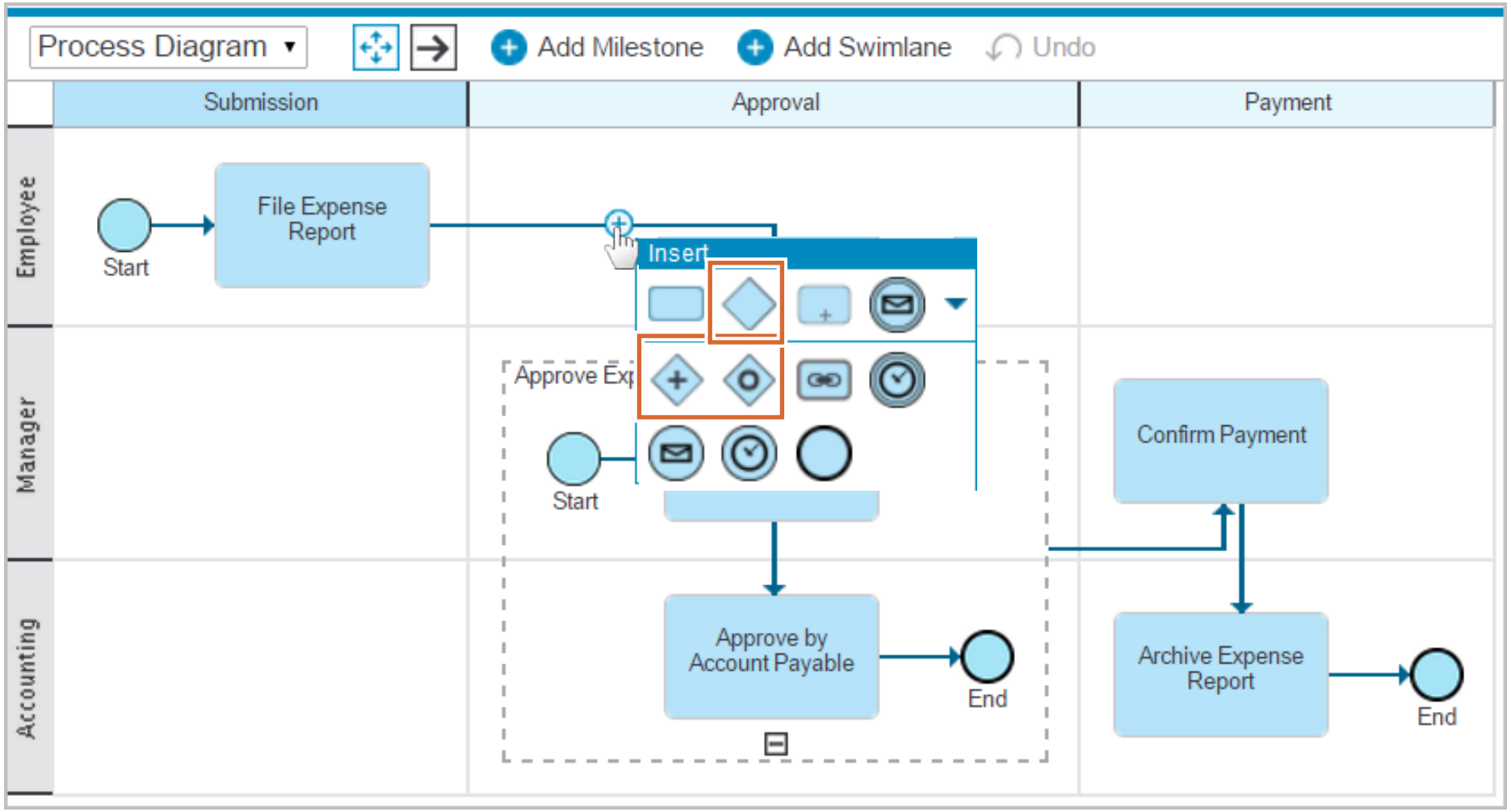
© Copyright IBM Corporation 2016

Event



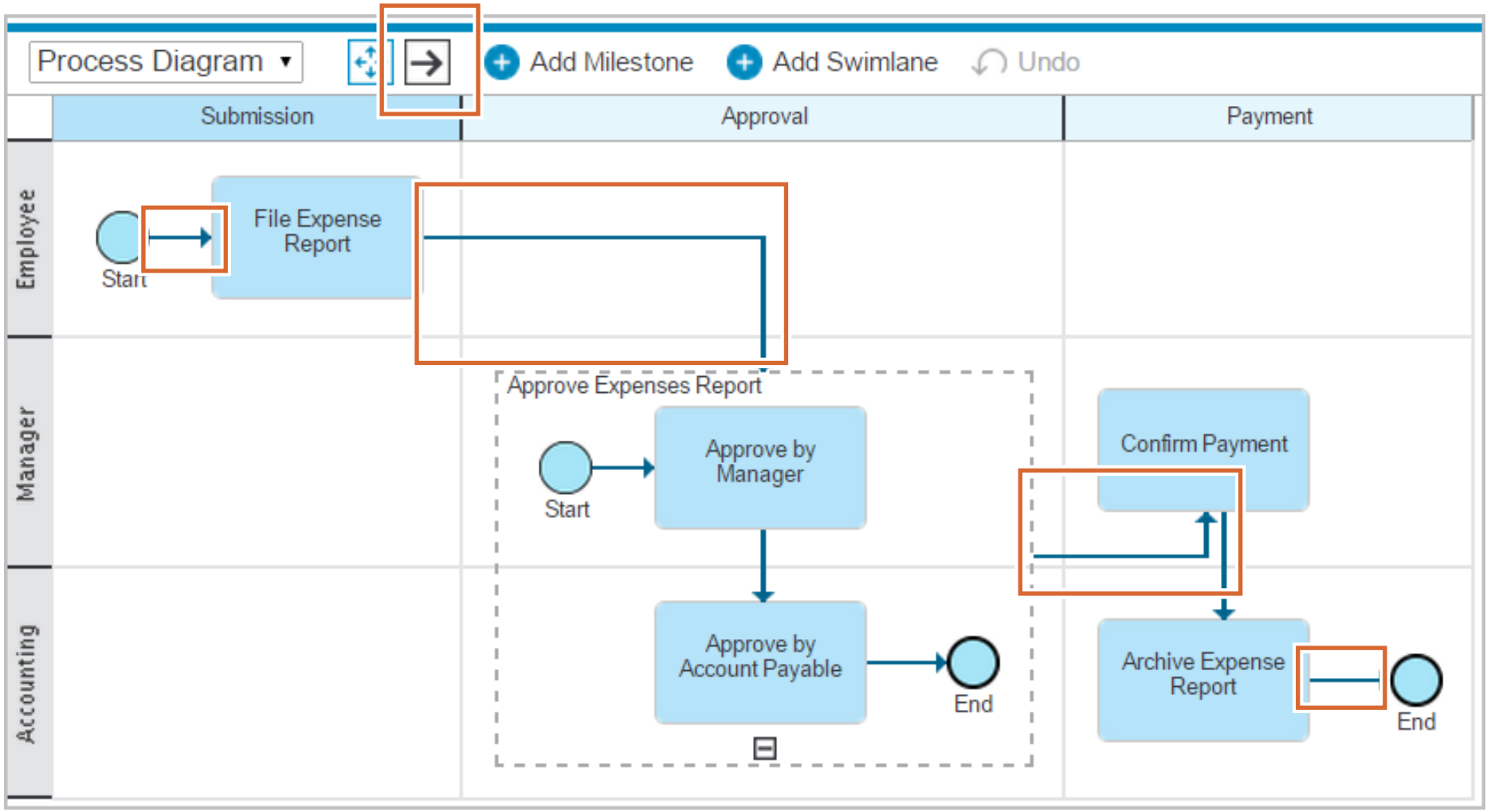
© Copyright IBM Corporation 2016

Gateway



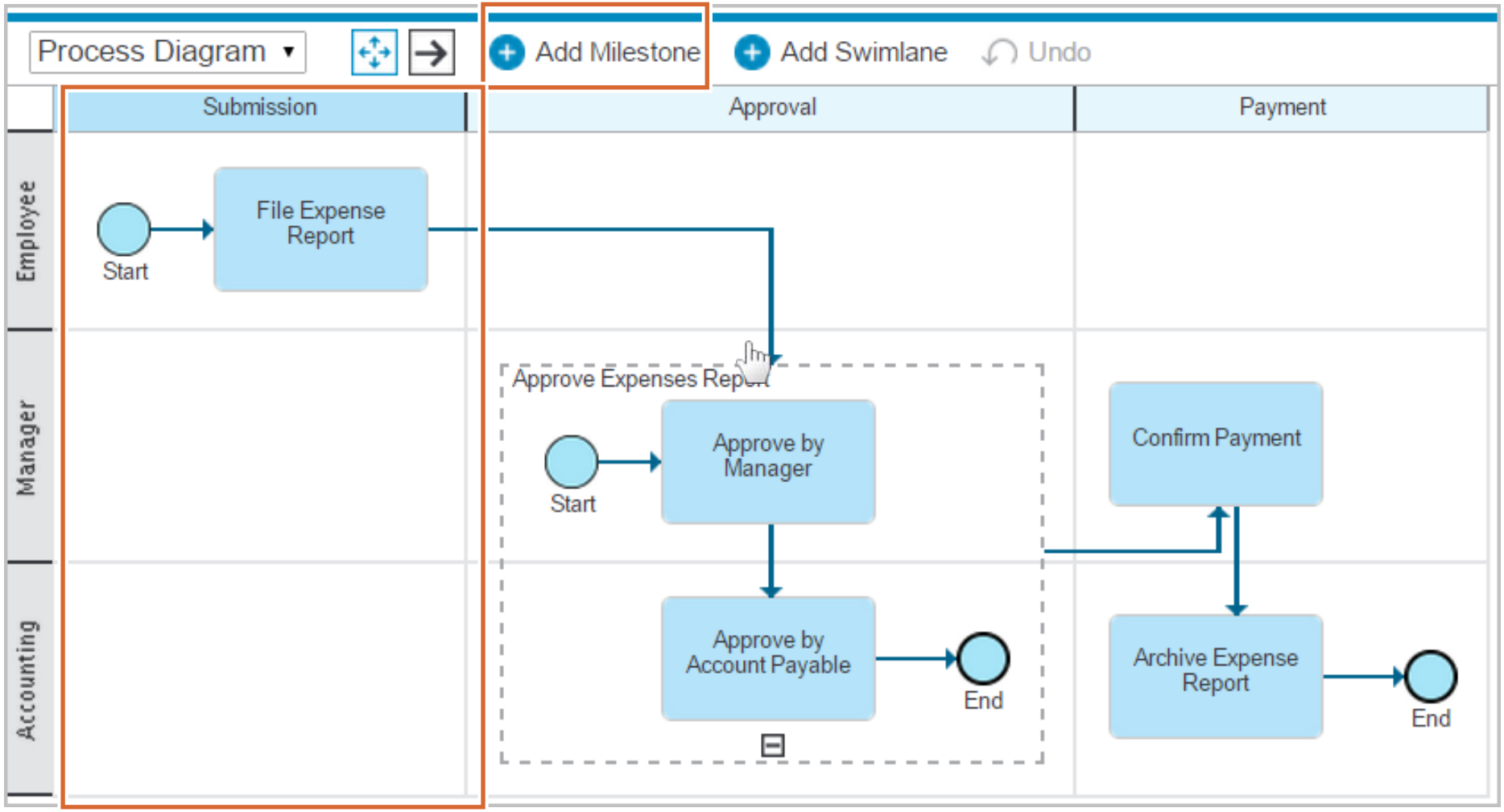
© Copyright IBM Corporation 2016

Flow



© Copyright IBM Corporation 2016

Not a BPMN element: Milestone



© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

Modifying a process diagram

© Copyright IBM Corporation 2016

Topics

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

© Copyright IBM Corporation 2016

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)	

© Copyright IBM Corporation 2016

Adding alternative paths to a process diagram

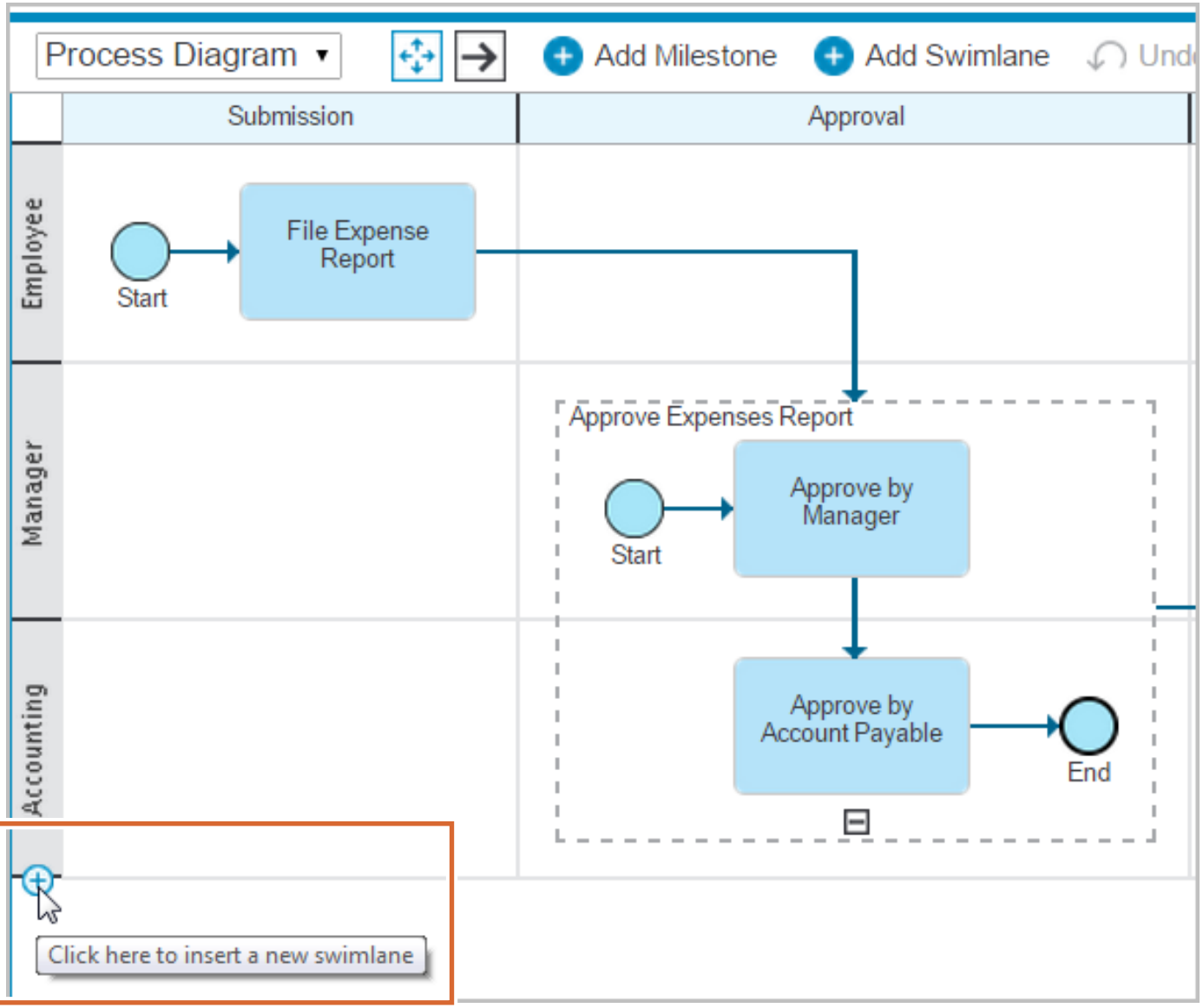
- Decision gateway: Process flow along only one possible answer

- Split gateway: Process flow along multiple answers

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

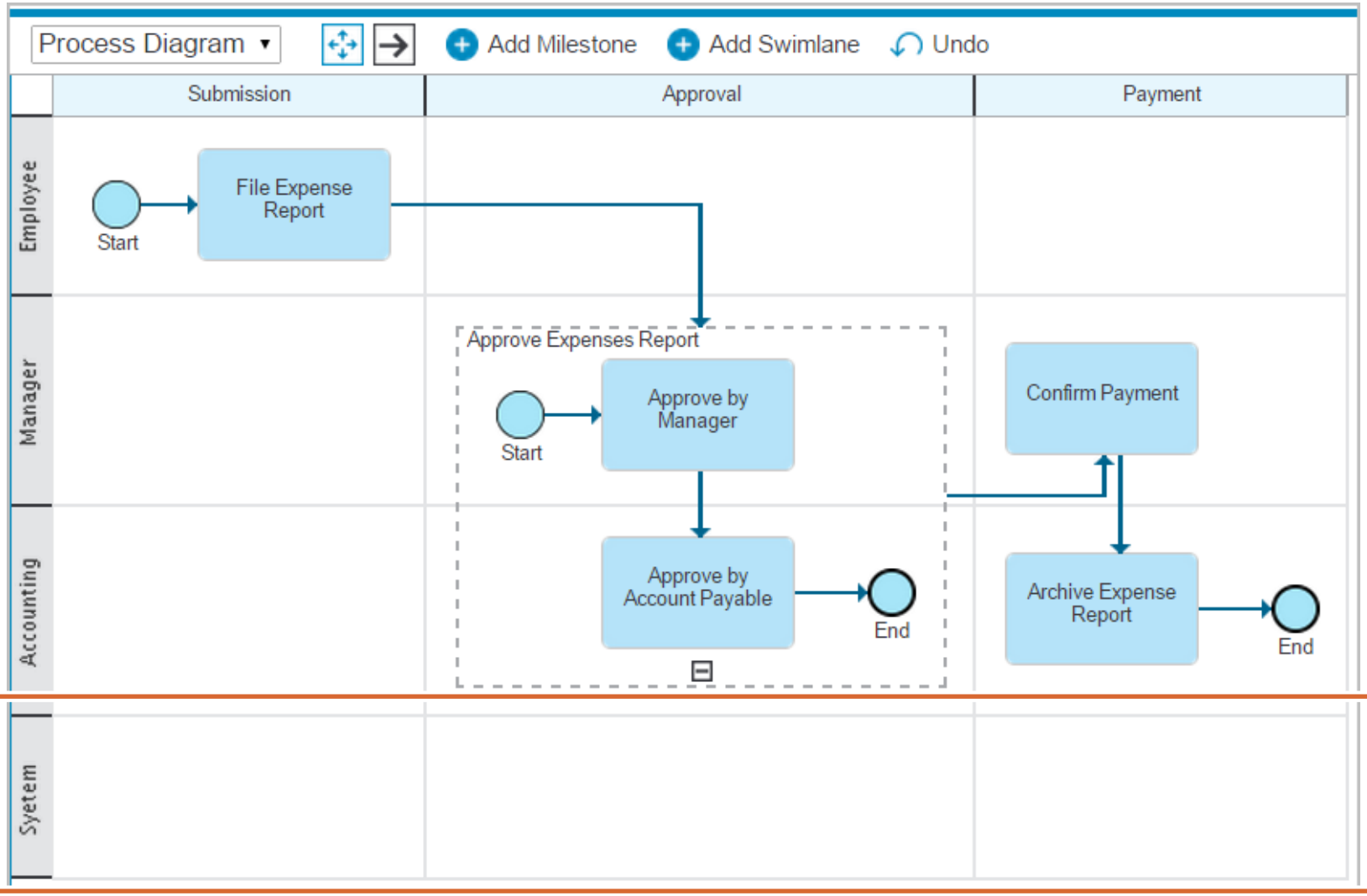
© Copyright IBM Corporation 2016

Alternative path example: Add a lane



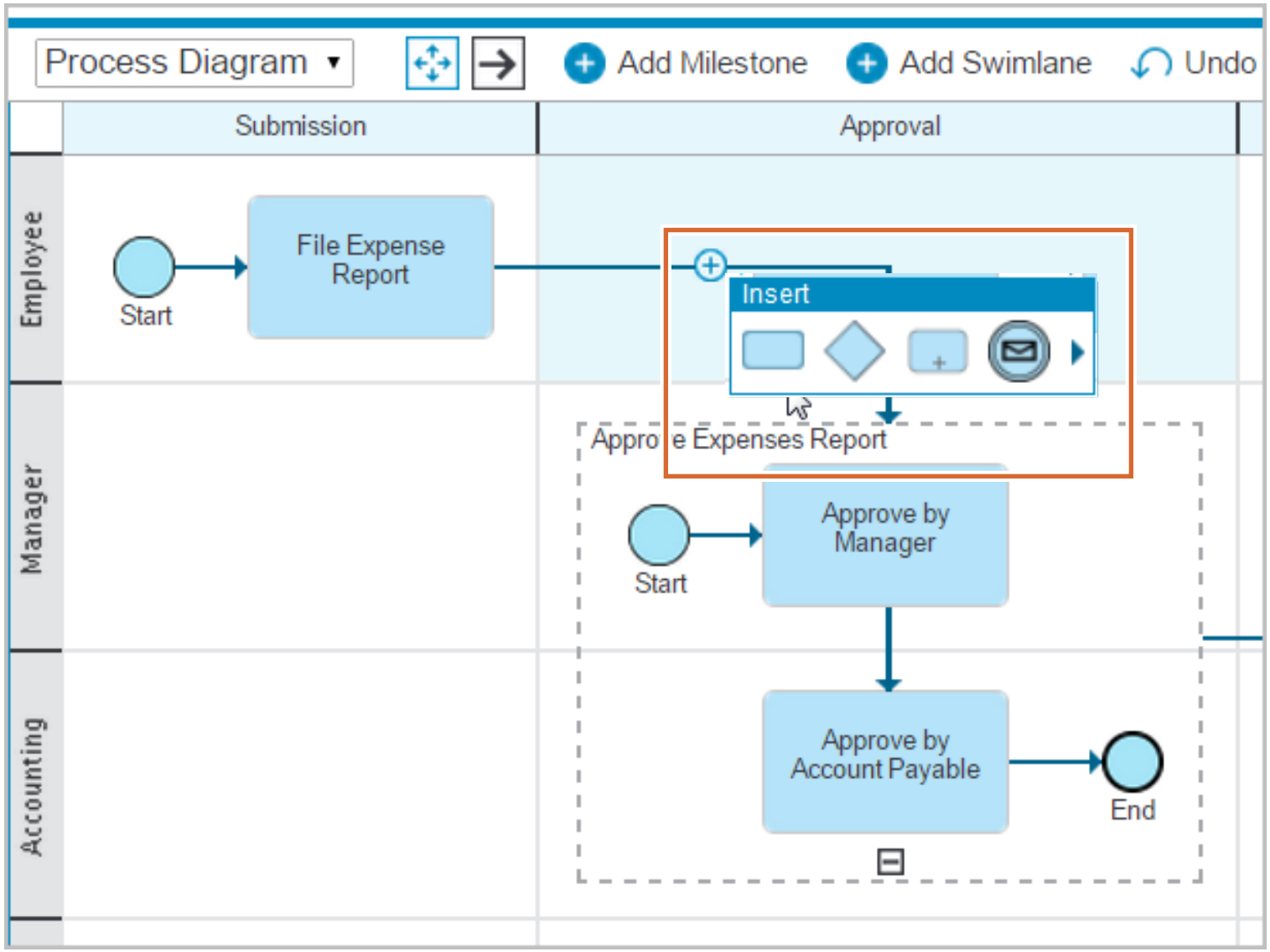
© Copyright IBM Corporation 2016

System lane



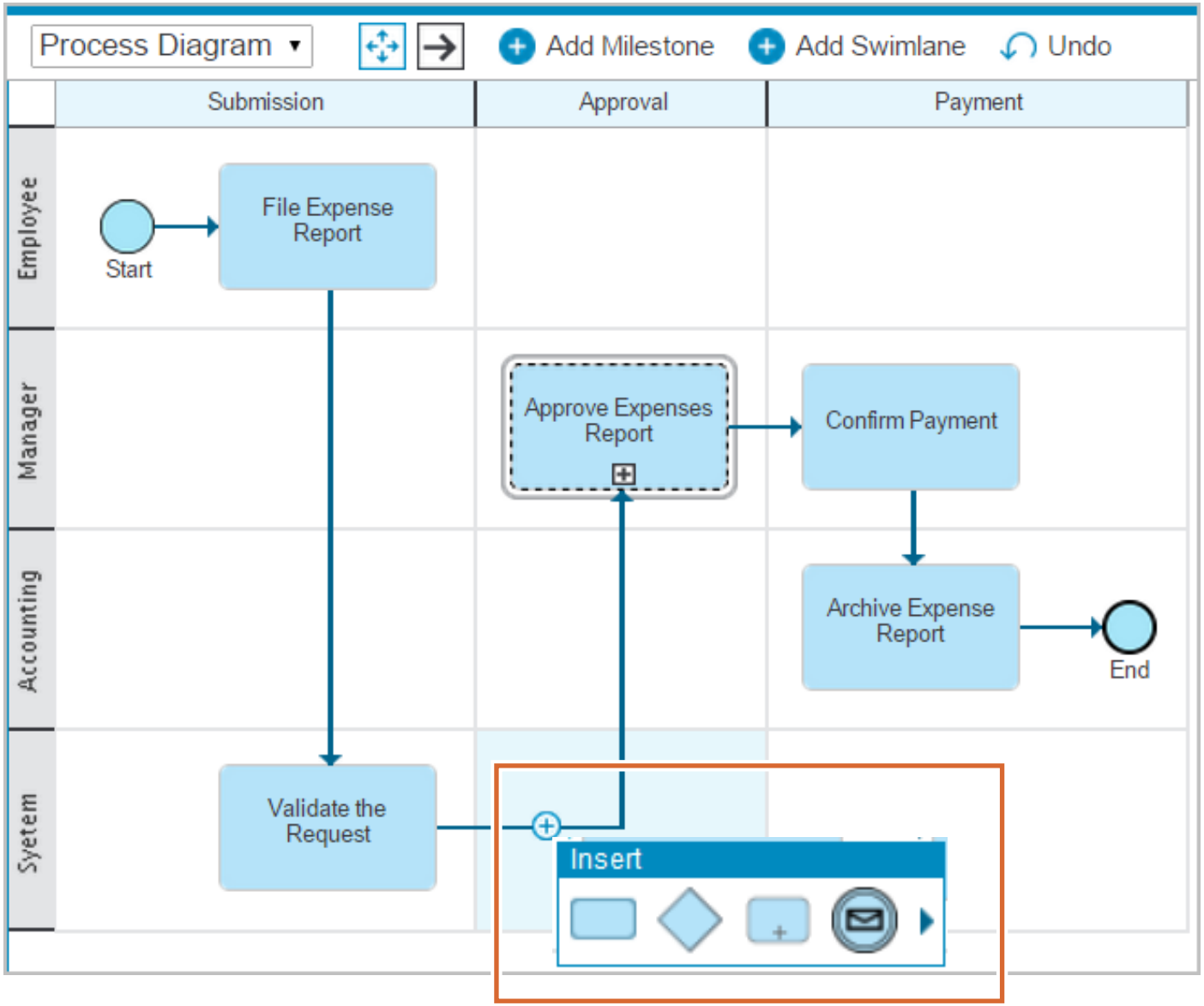
© Copyright IBM Corporation 2016

Alternative path example: Add an activity



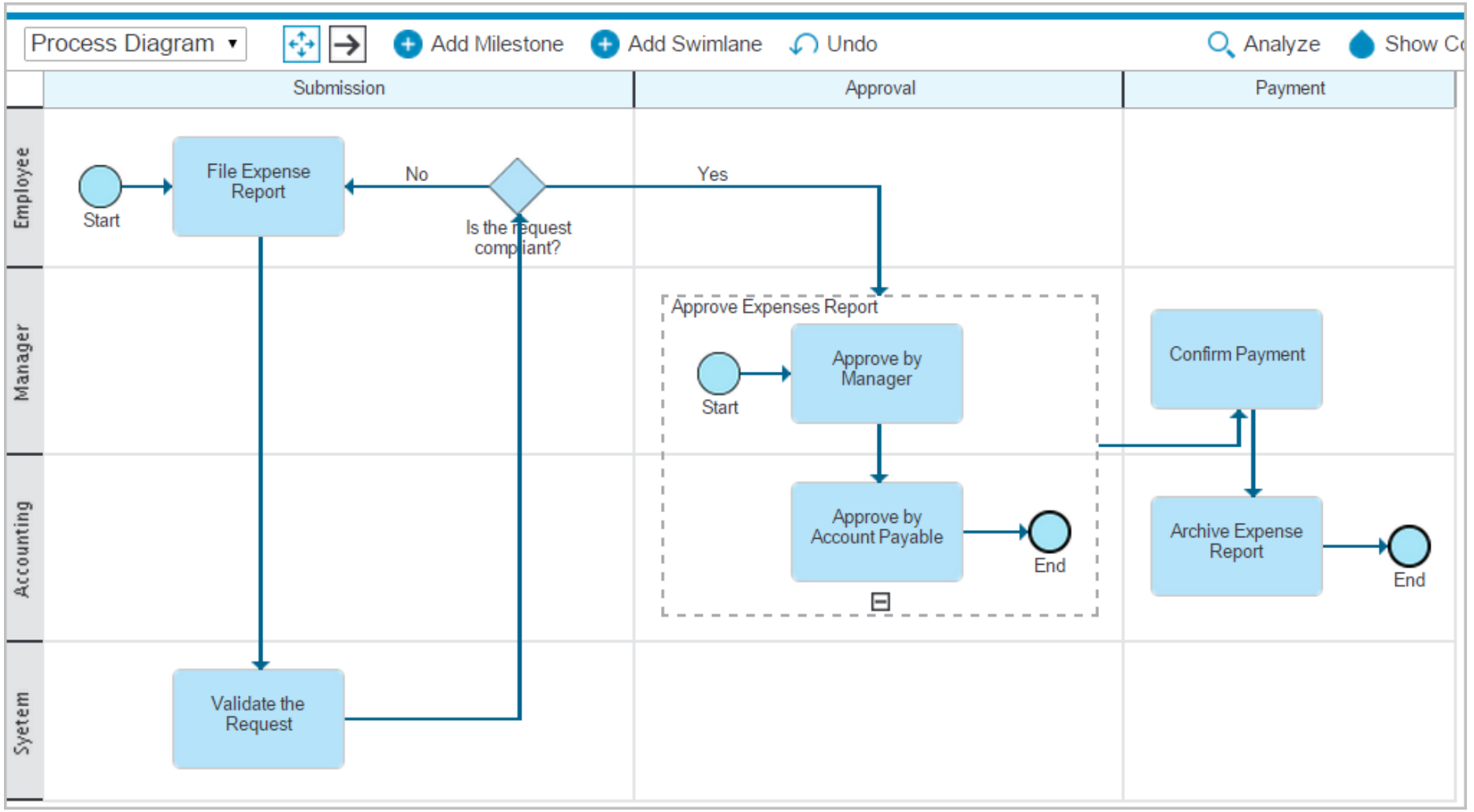
© Copyright IBM Corporation 2016

Alternative path example: Add a decision gateway



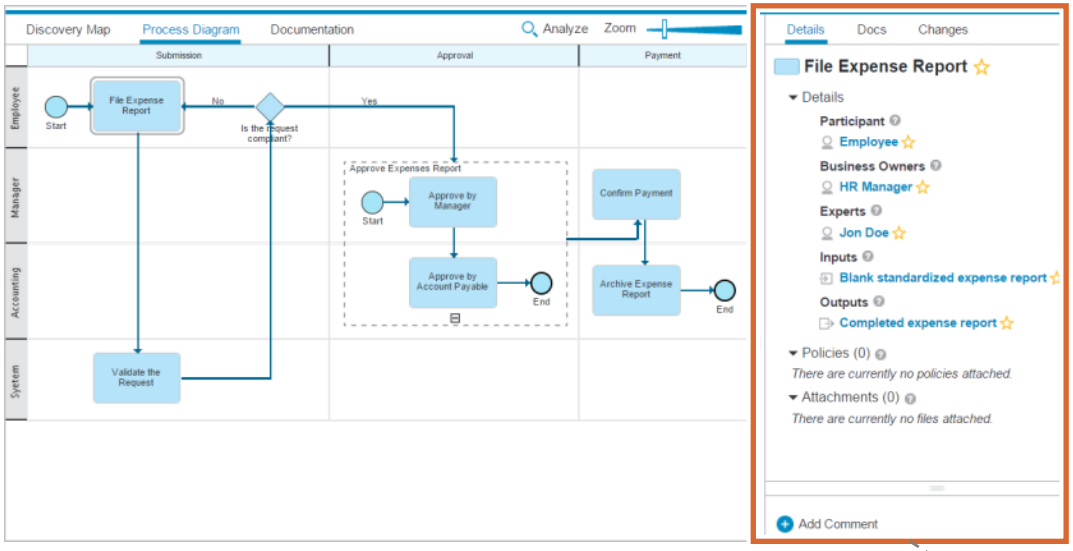
© Copyright IBM Corporation 2016

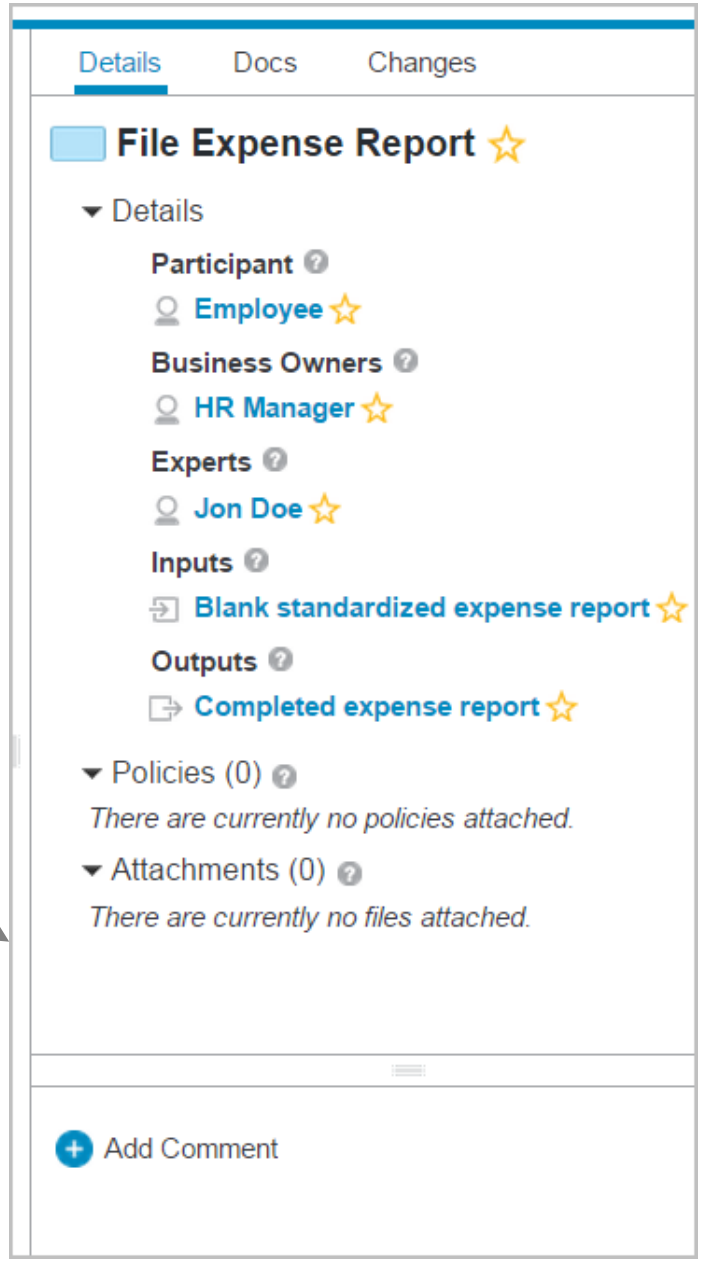
Expense reimbursement “as is” process model



© Copyright IBM Corporation 2016

Share a process diagram





© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

Decision discovery

© Copyright IBM Corporation 2016

Topics

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

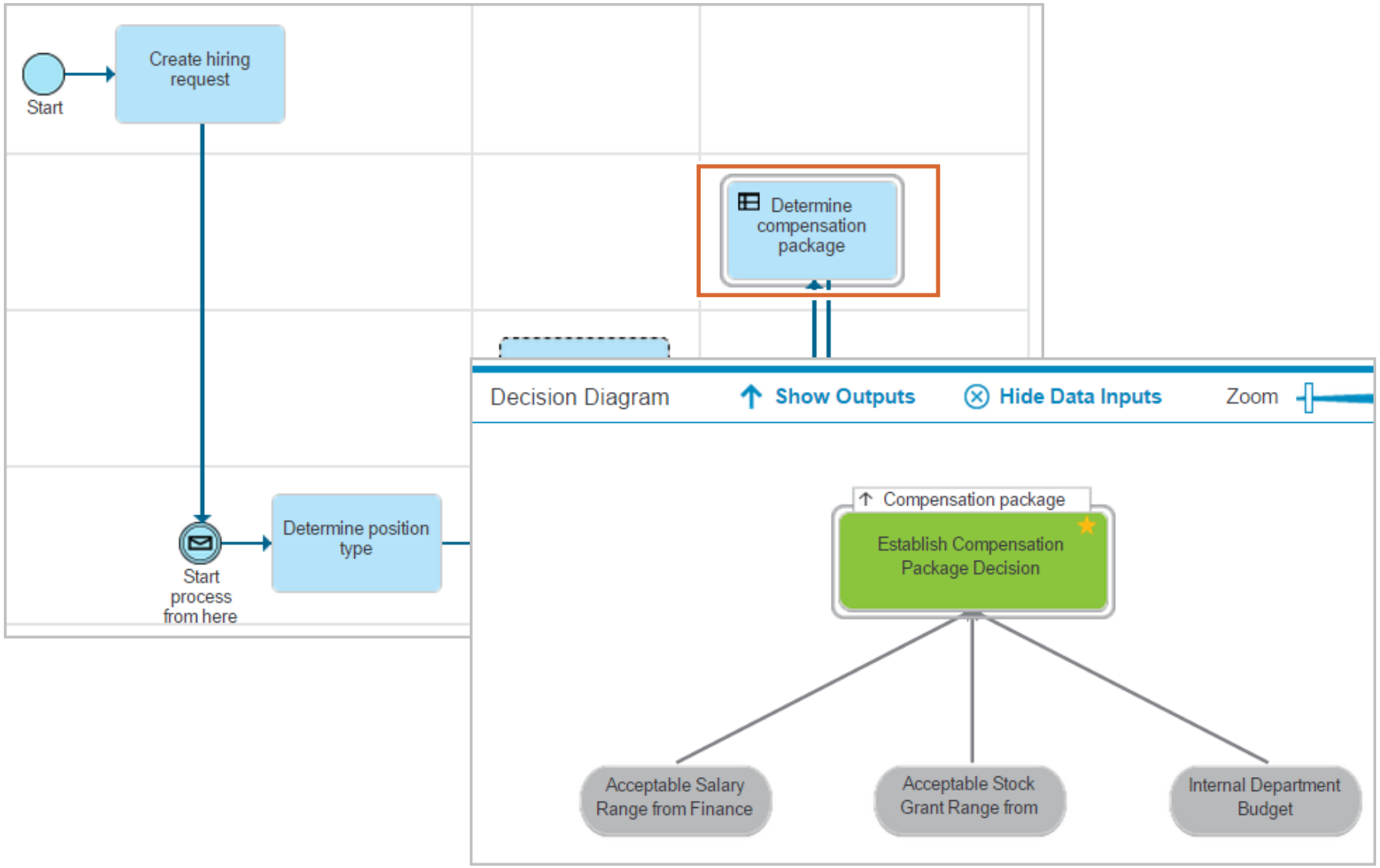
© Copyright IBM Corporation 2016

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.

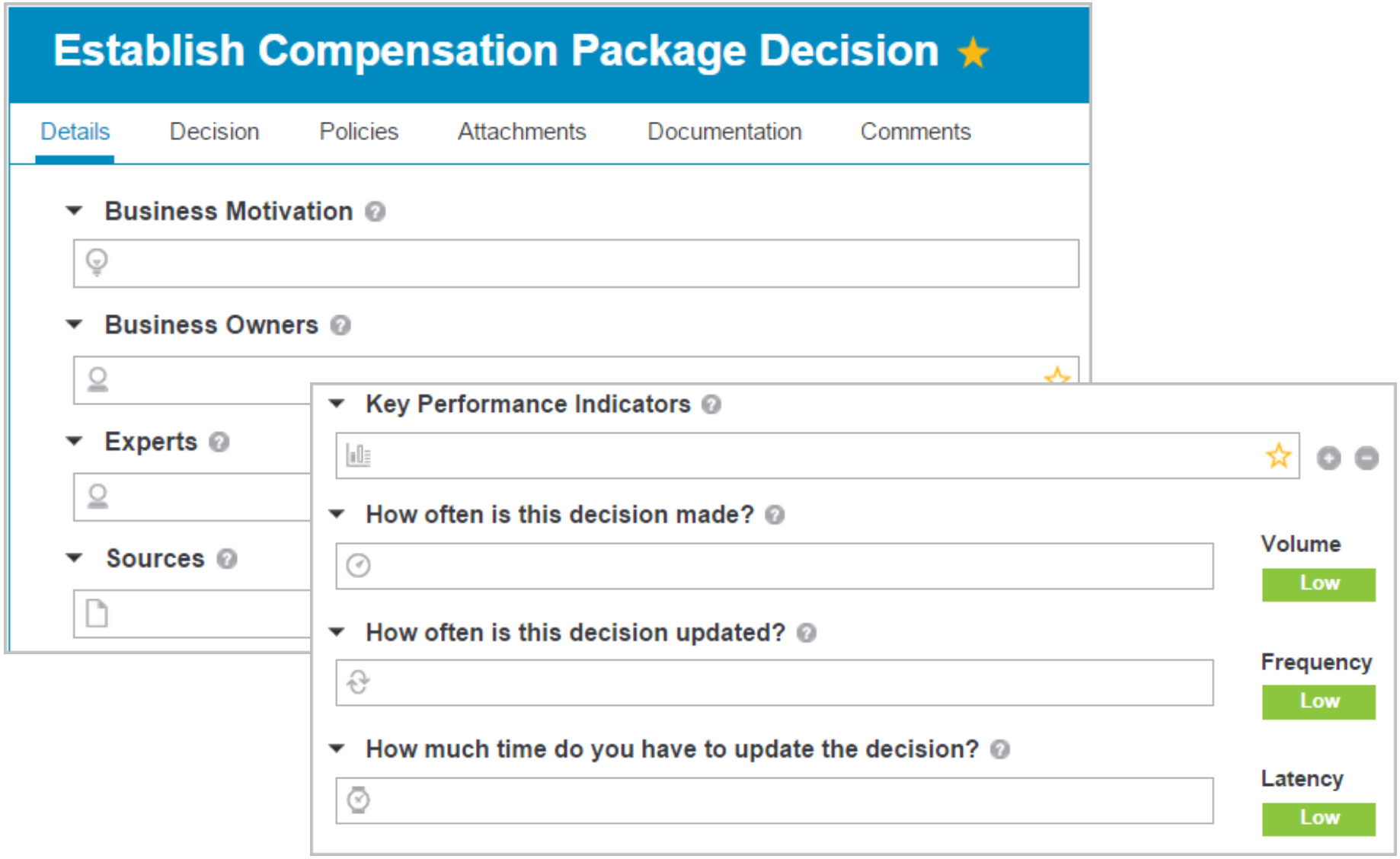
© Copyright IBM Corporation 2016

Decisions within business processes



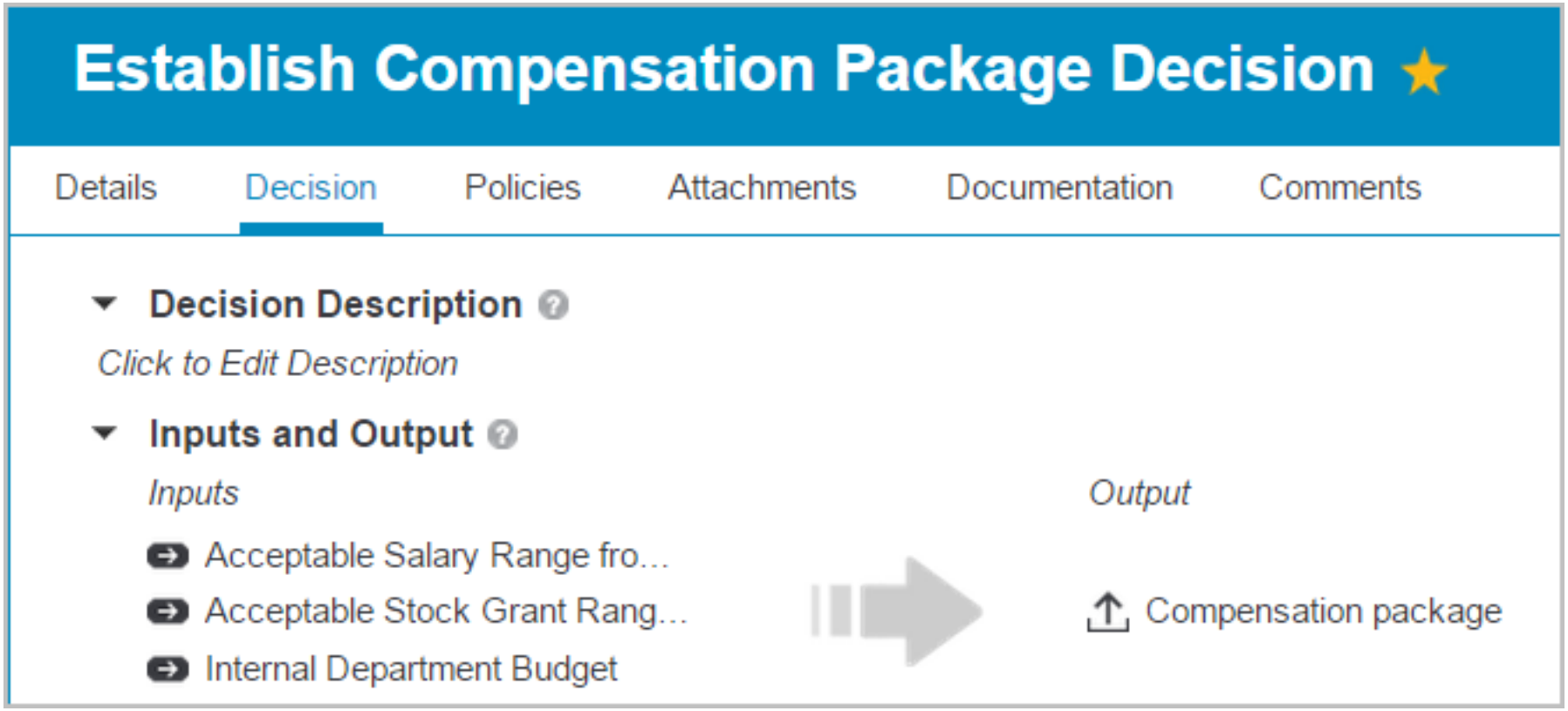
© Copyright IBM Corporation 2016

Capturing key decision characteristics: Details



© Copyright IBM Corporation 2016

Capturing key decision characteristics: Decision (1 of 2)



© Copyright IBM Corporation 2016

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

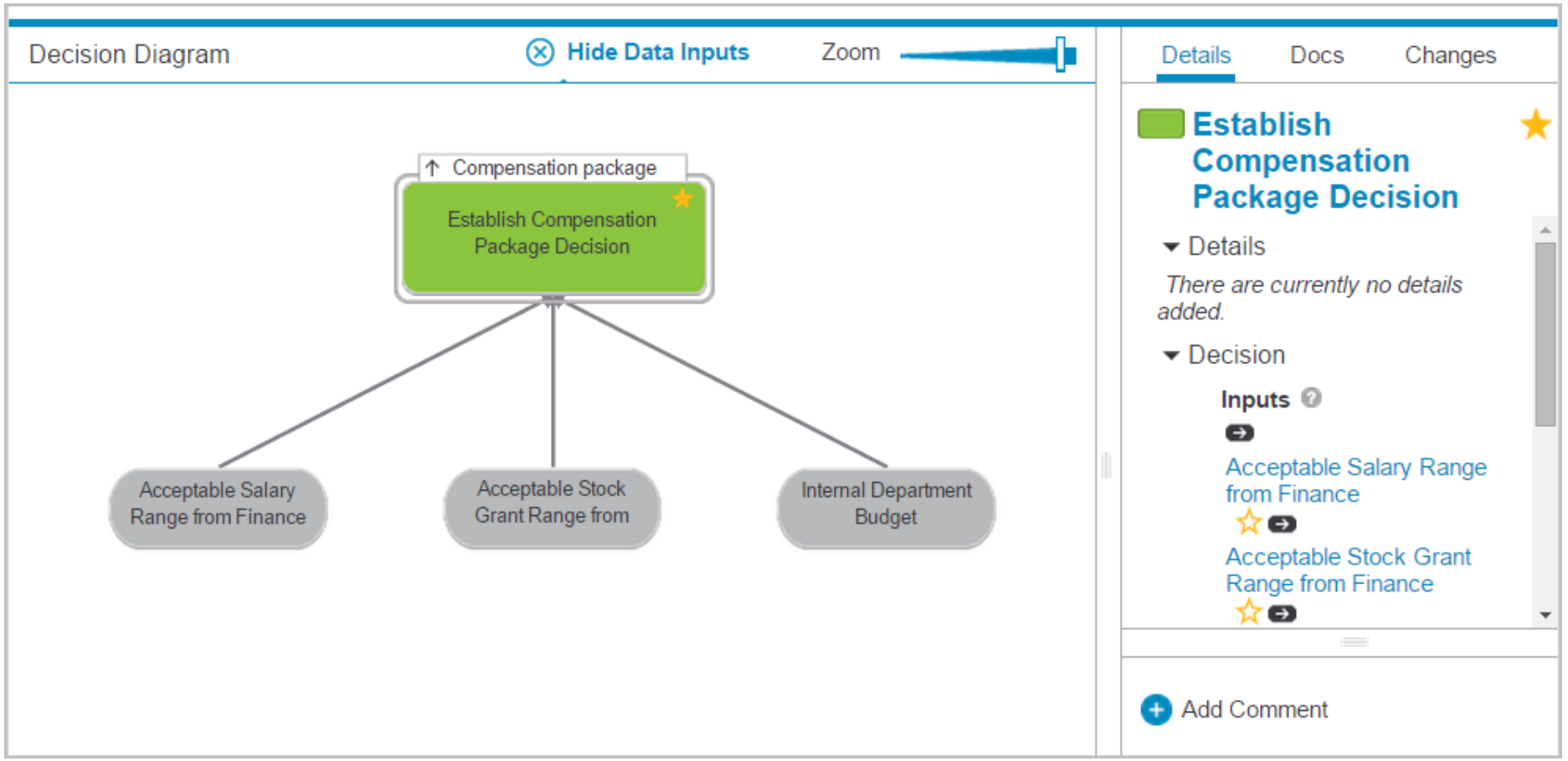
© Copyright IBM Corporation 2016

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.

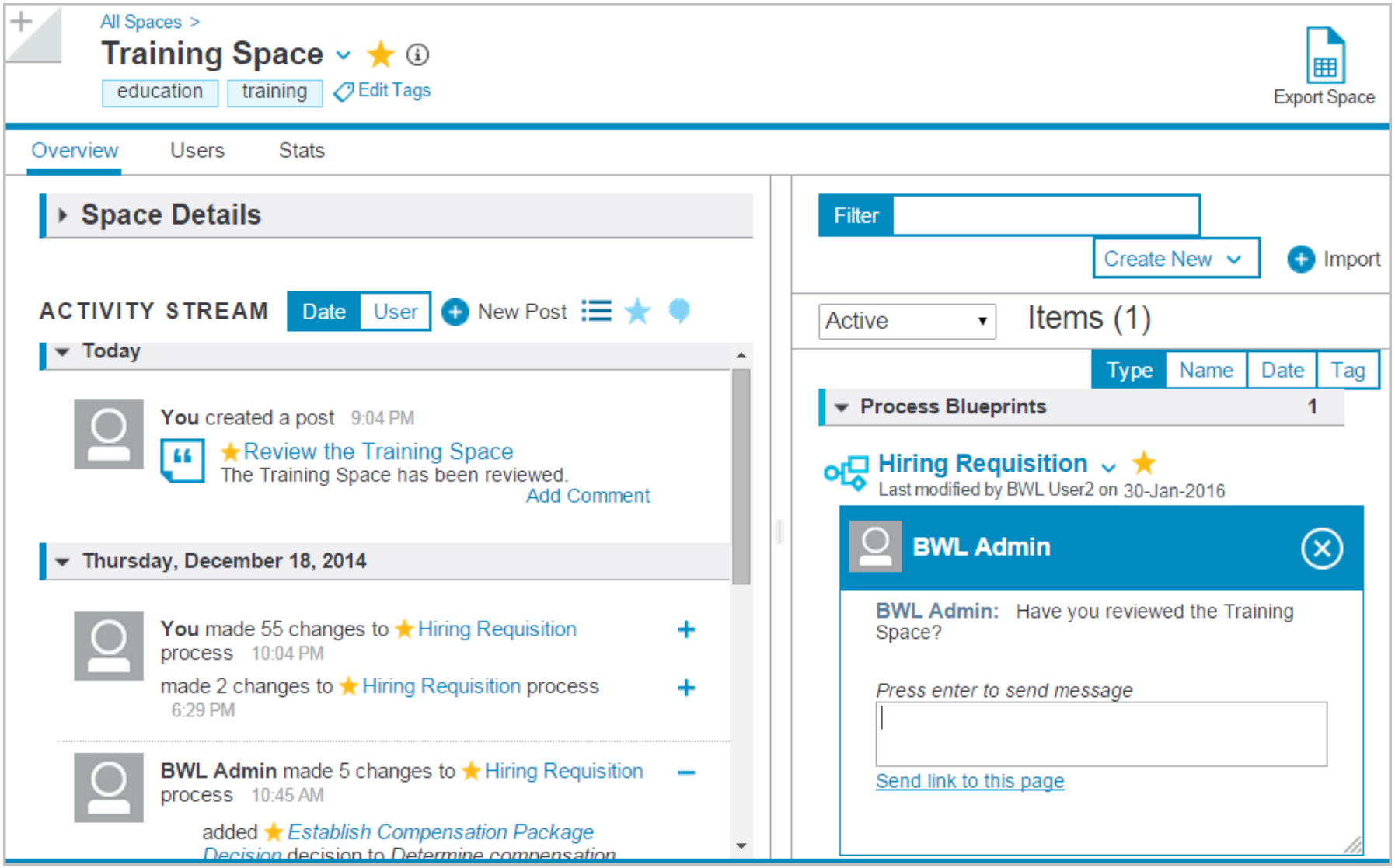
© Copyright IBM Corporation 2016

Viewing a decision



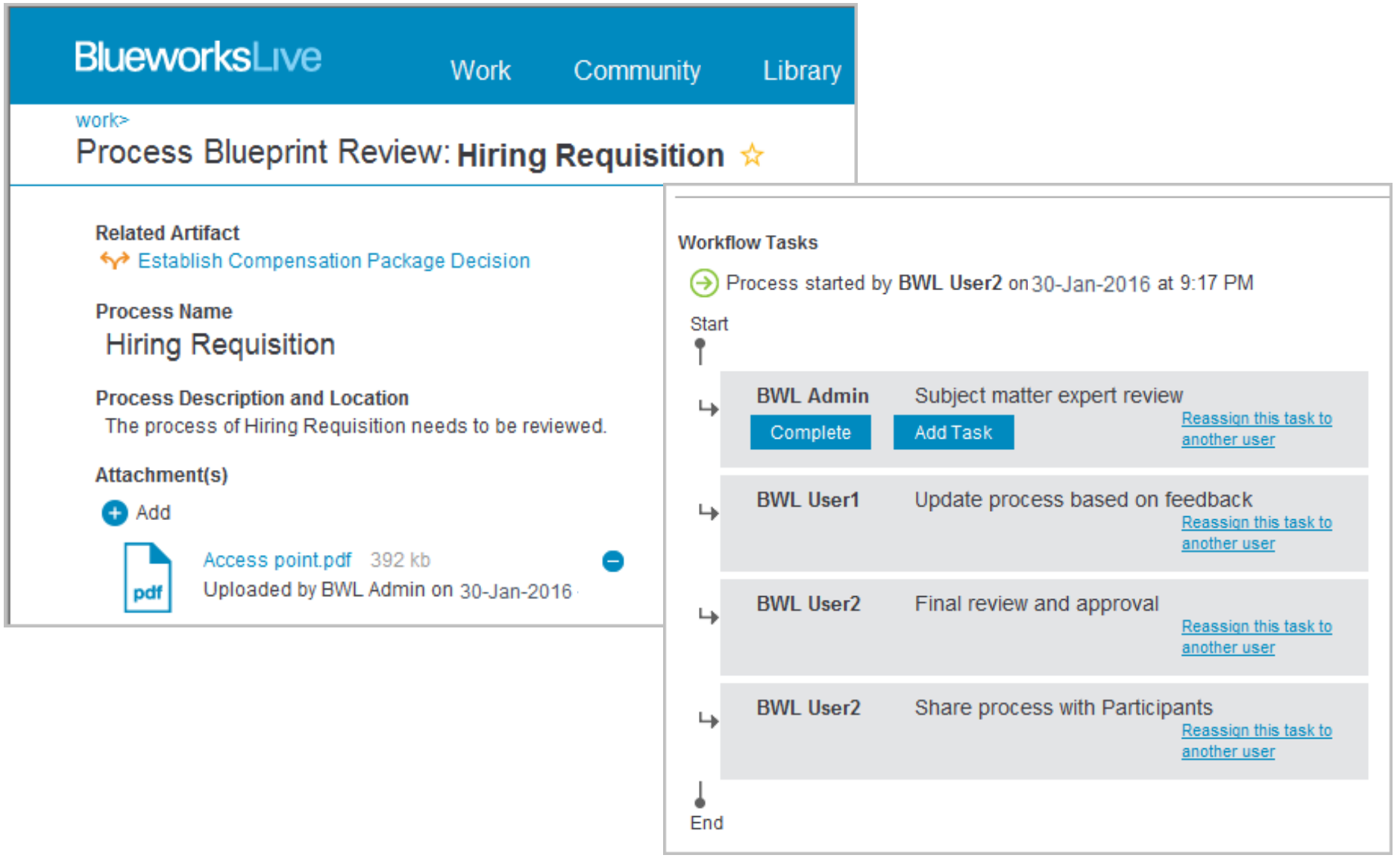
© Copyright IBM Corporation 2016

Collaborating on decisions



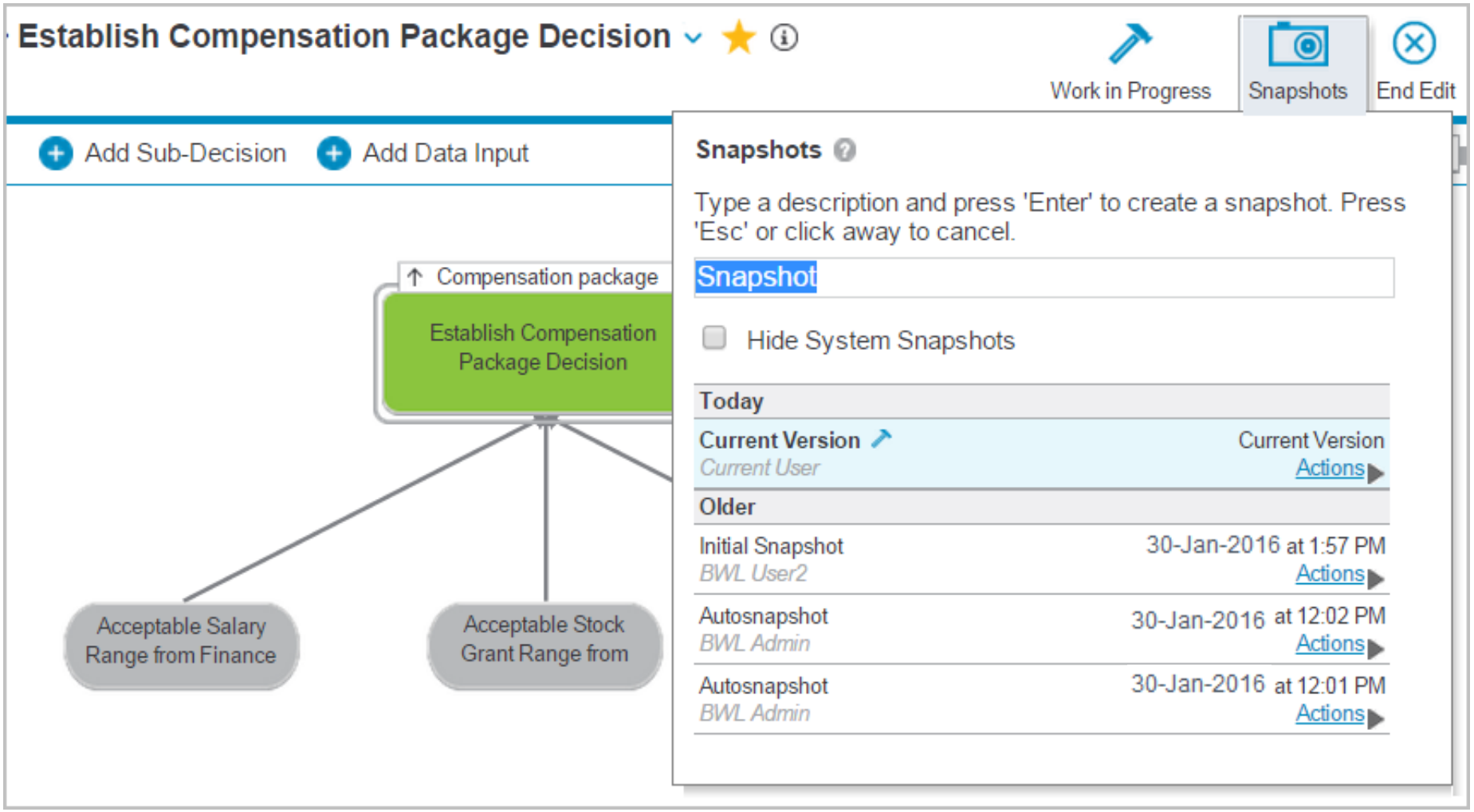
© Copyright IBM Corporation 2016

Validating decisions



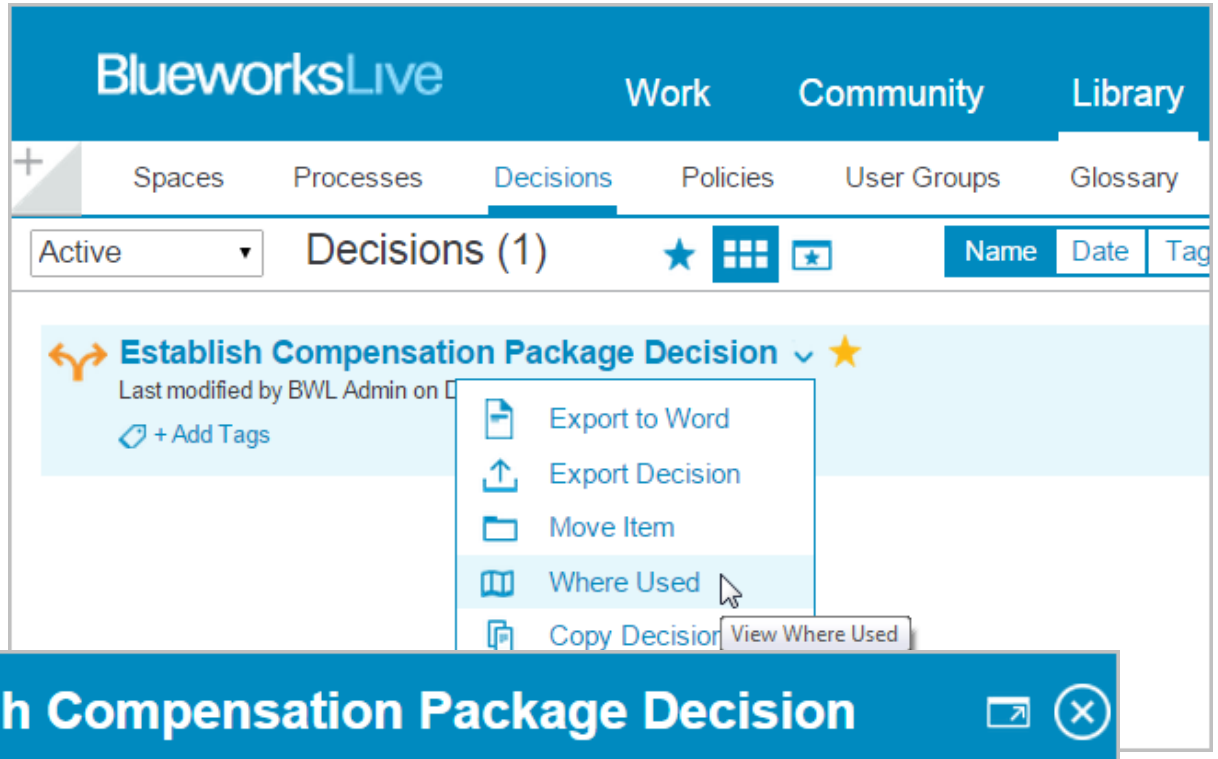
© Copyright IBM Corporation 2016

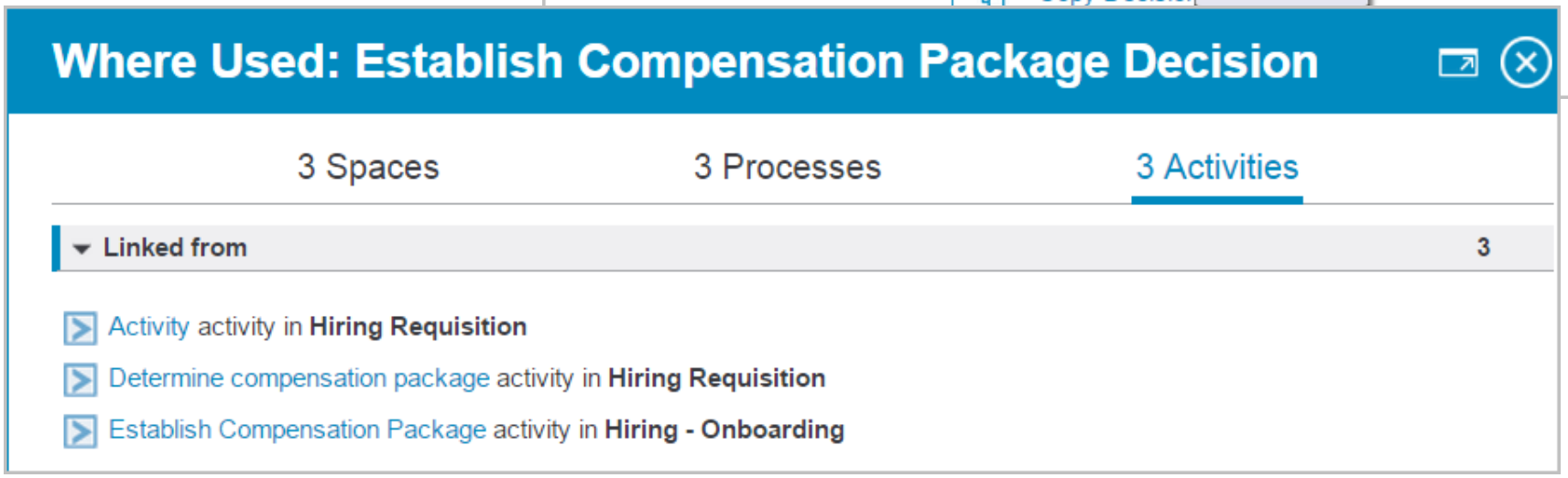
Tracking changes to decisions



© Copyright IBM Corporation 2016

Finding and sharing decisions





© Copyright IBM Corporation 2016

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.

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

Playback of a process diagram

© Copyright IBM Corporation 2016

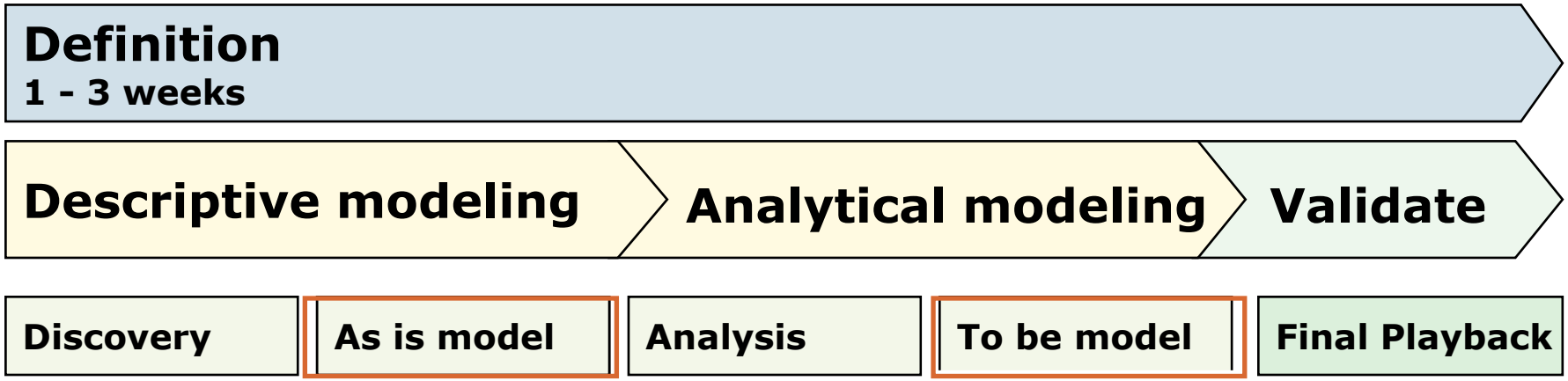
Topics

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

© Copyright IBM Corporation 2016

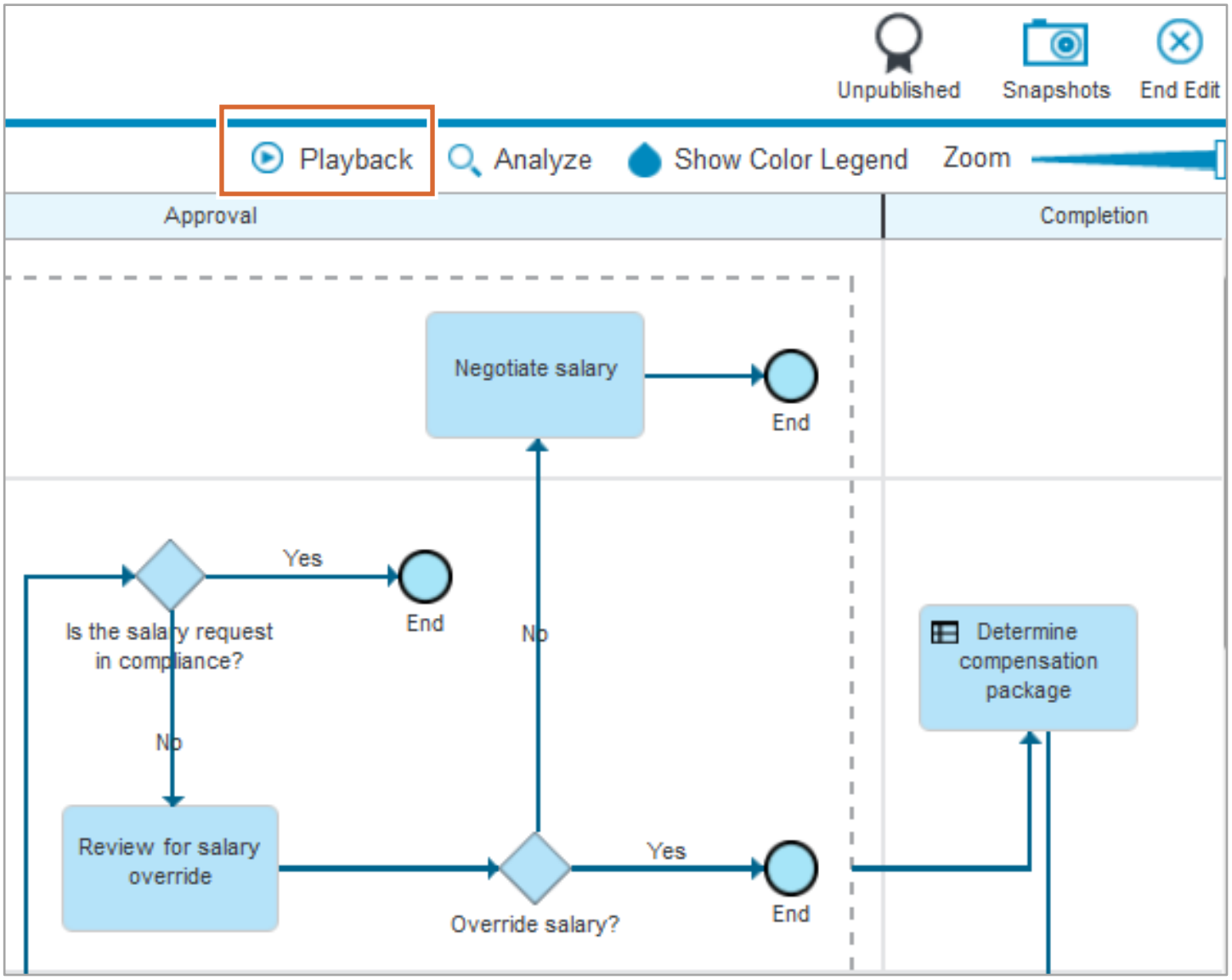
Overview

Playback zero



© Copyright IBM Corporation 2016

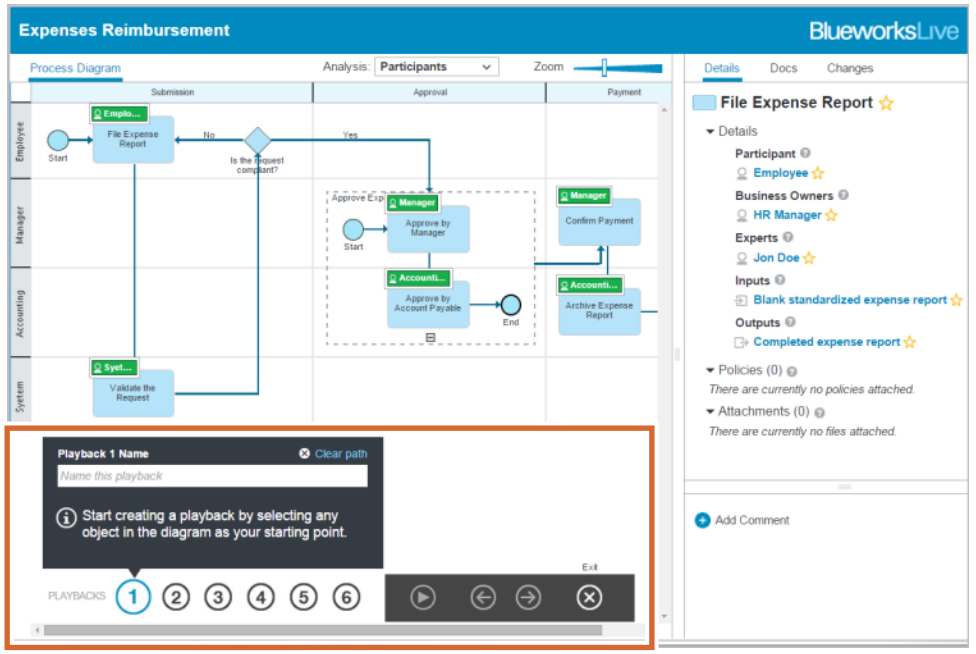
Conducting a Playback



Playback zero - Process Diagram

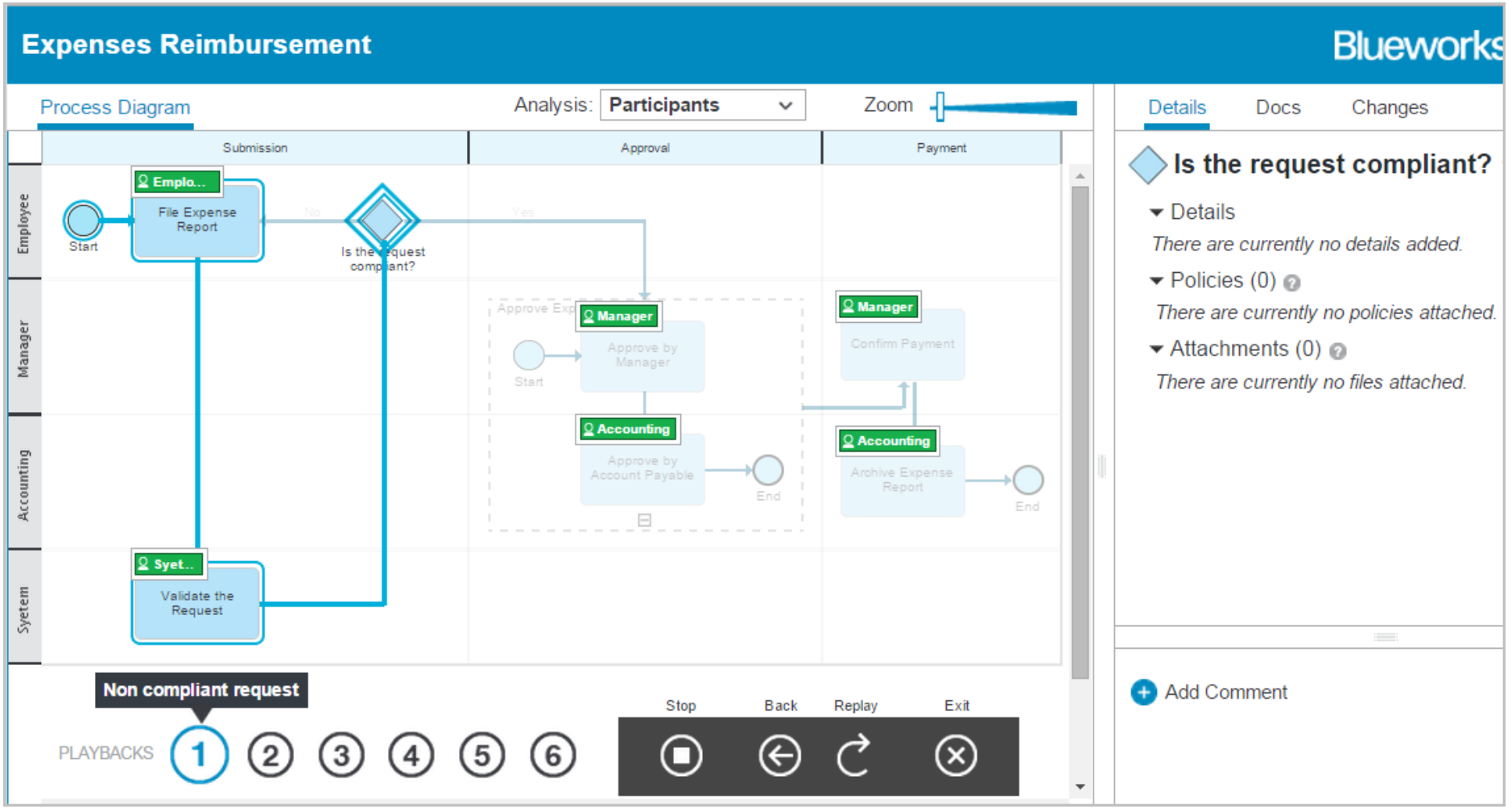
© Copyright IBM Corporation 2016

Playback interface



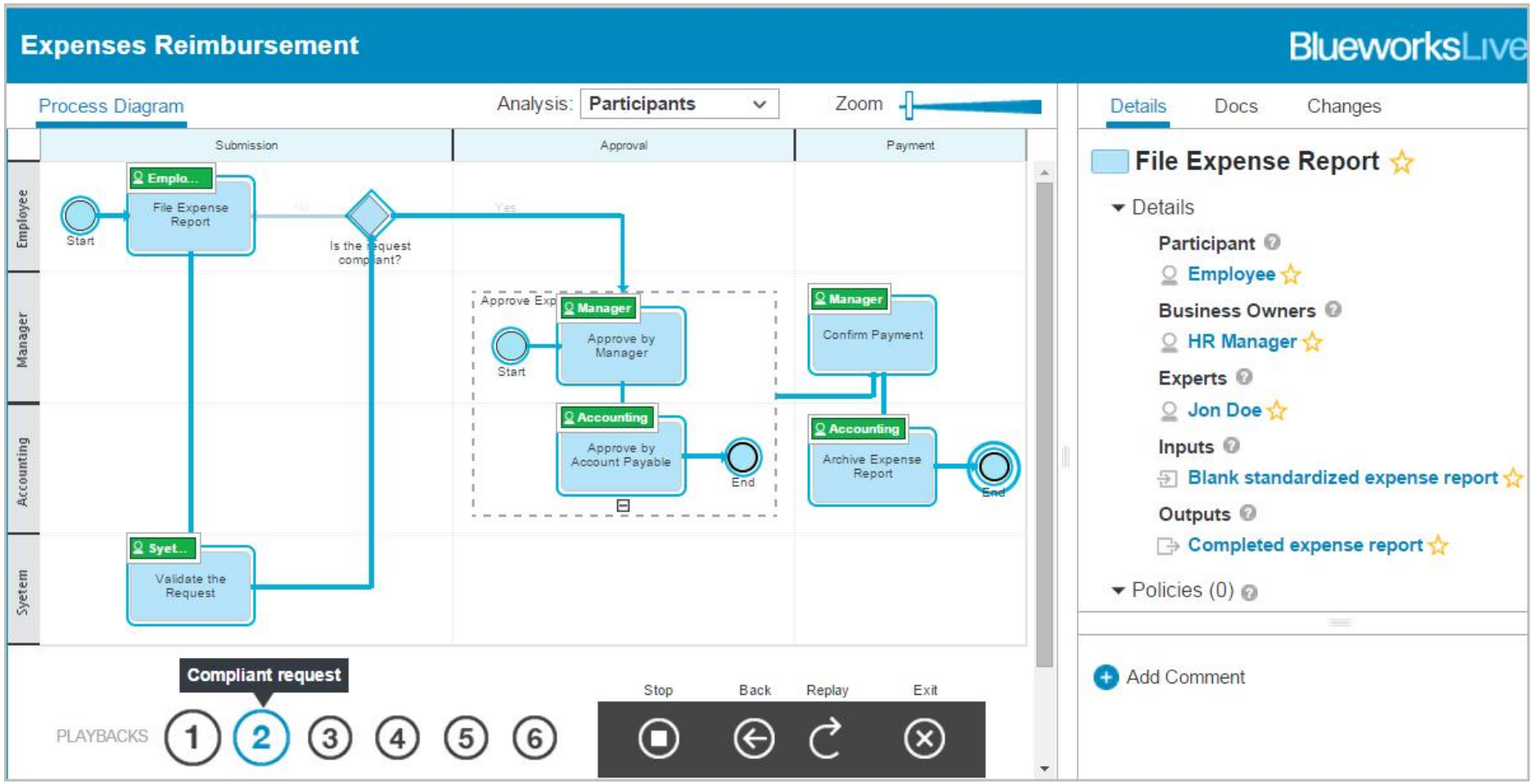
© Copyright IBM Corporation 2016

Reviewing path 1 in the process diagram



© Copyright IBM Corporation 2016

Reviewing path 2 in the process diagram



© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

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)	

© Copyright IBM Corporation 2016

Other features of Blueworks Live

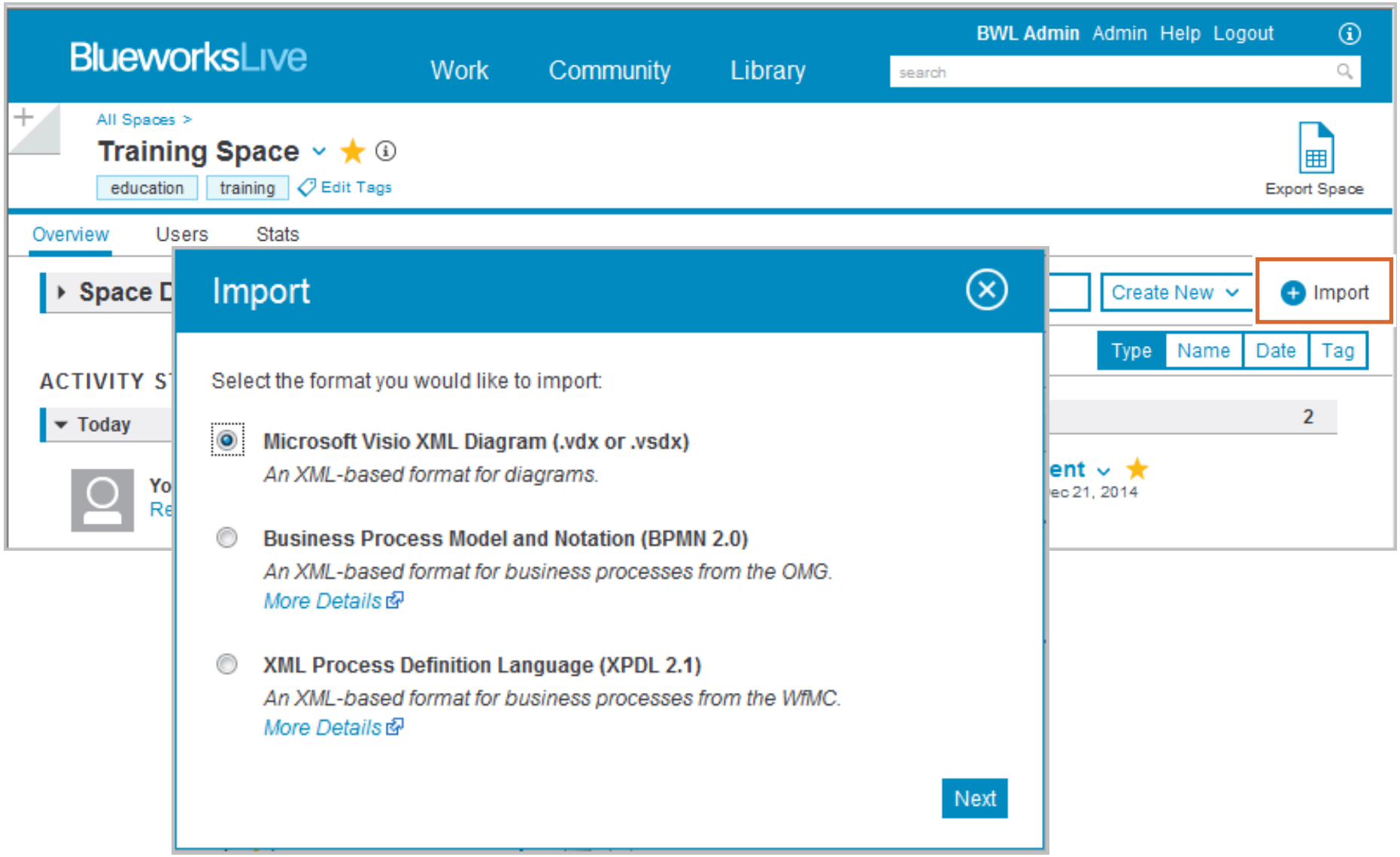
© Copyright IBM Corporation 2016

Topics

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

© Copyright IBM Corporation 2016

Import Visio 2013 Diagrams



© Copyright IBM Corporation 2016

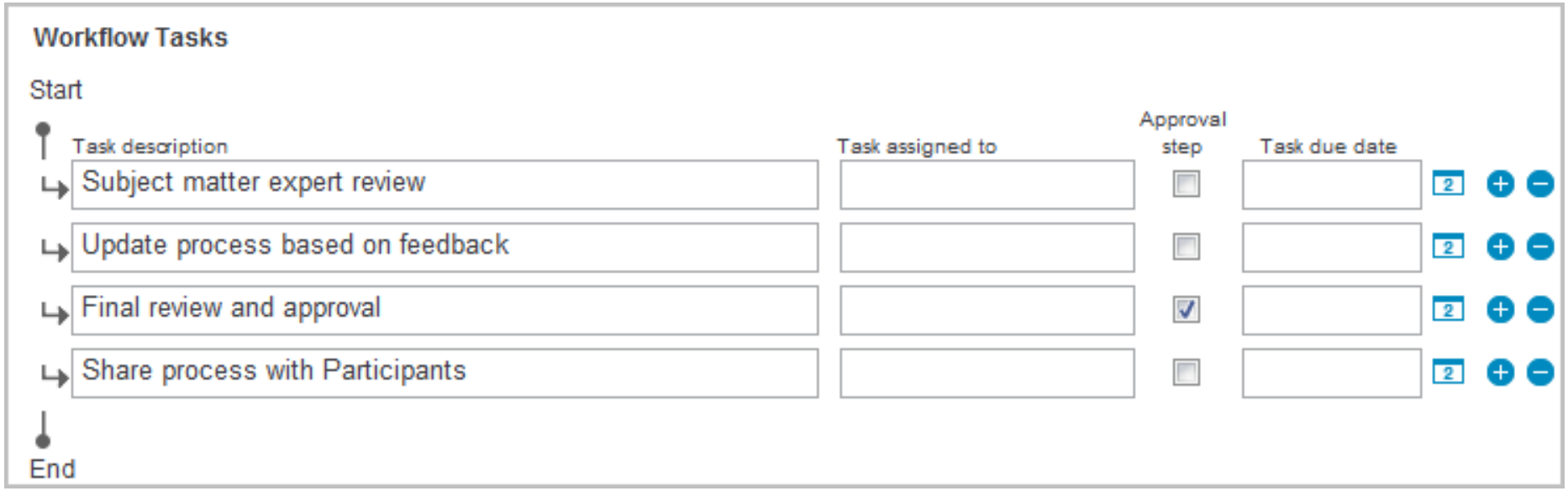
Governance with Blueworks Live

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

© Copyright IBM Corporation 2016

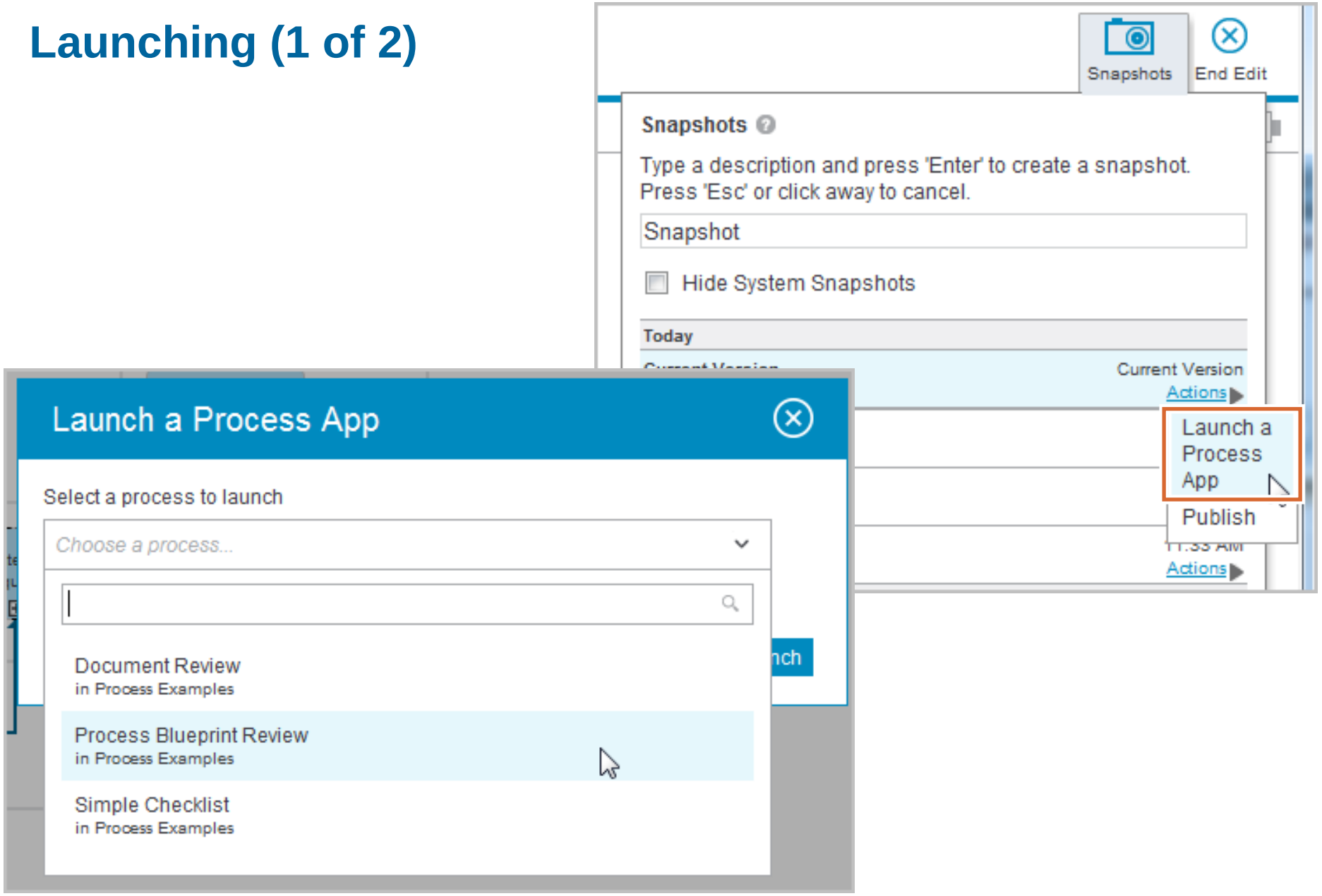
Defining

- 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



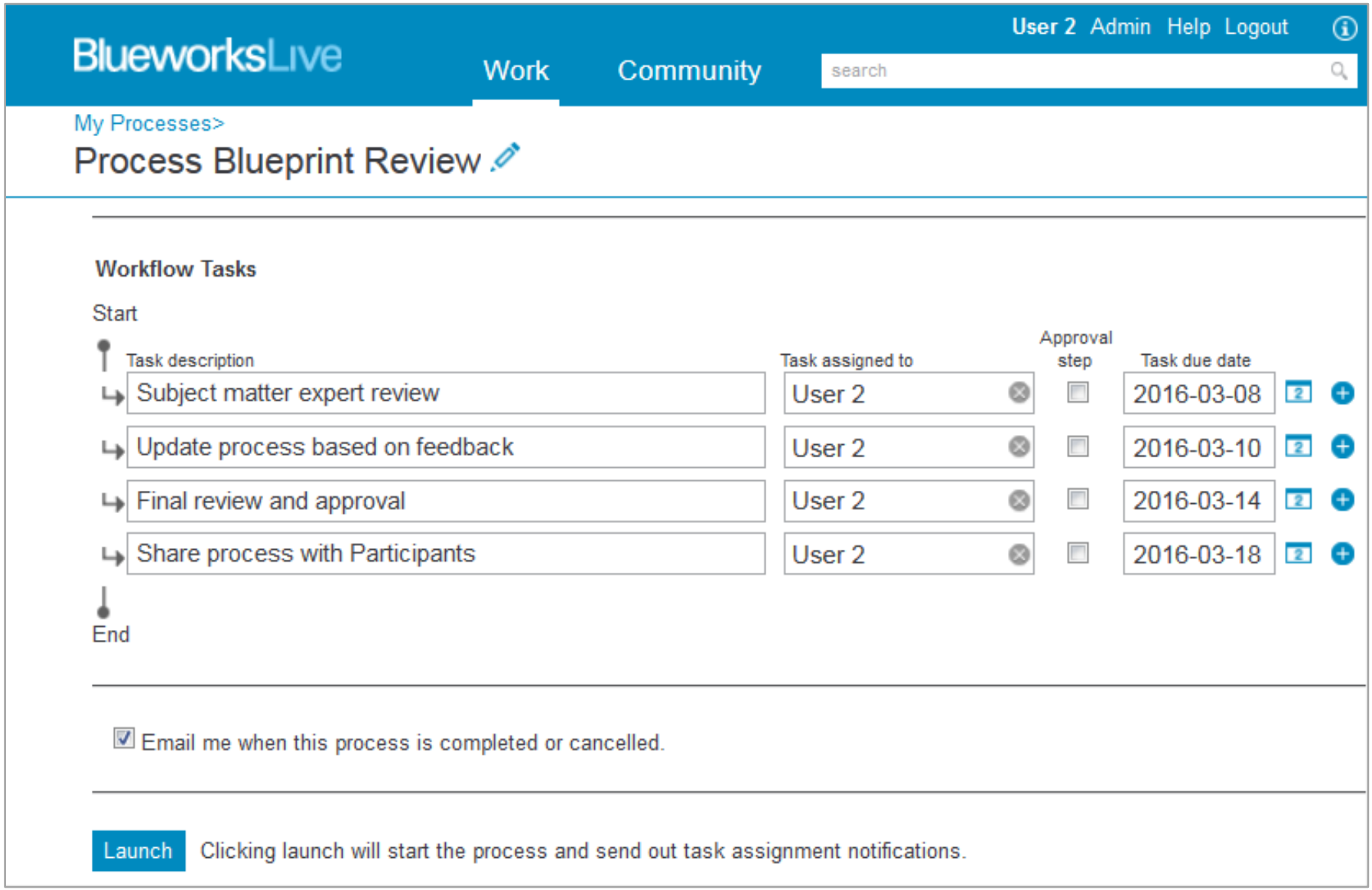
© Copyright IBM Corporation 2016

Launching (1 of 2)



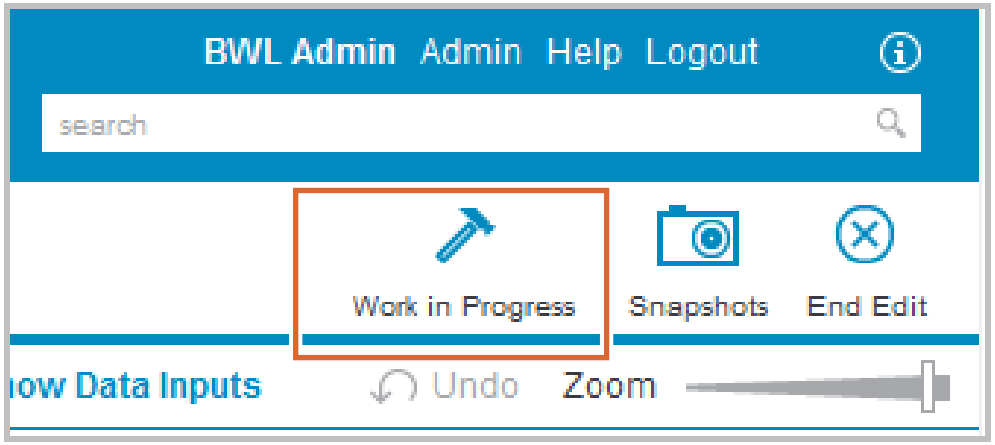
© Copyright IBM Corporation 2016

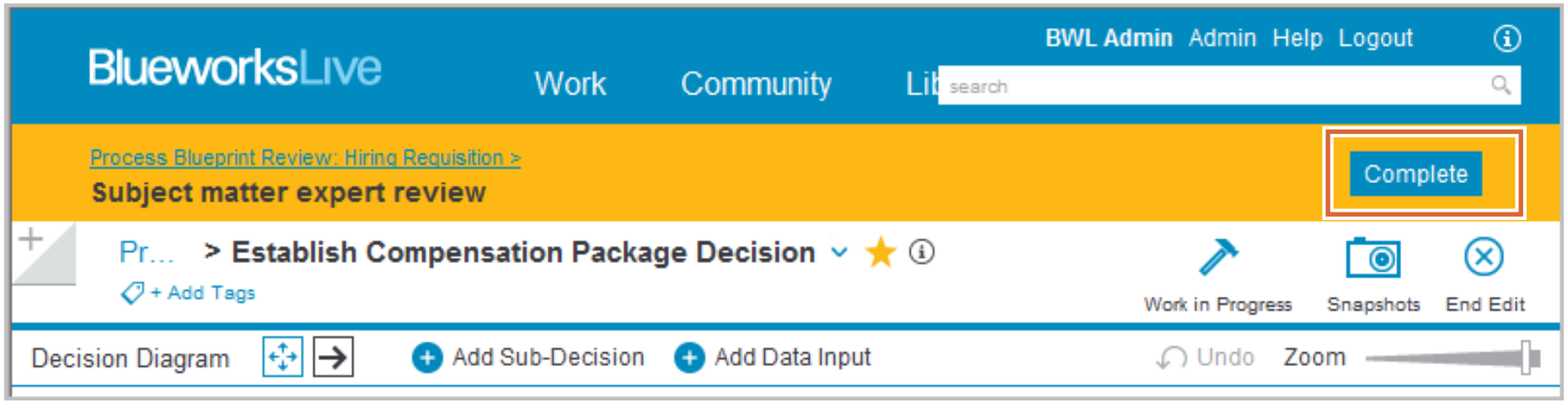
Launching (2 of 2)



© Copyright IBM Corporation 2016

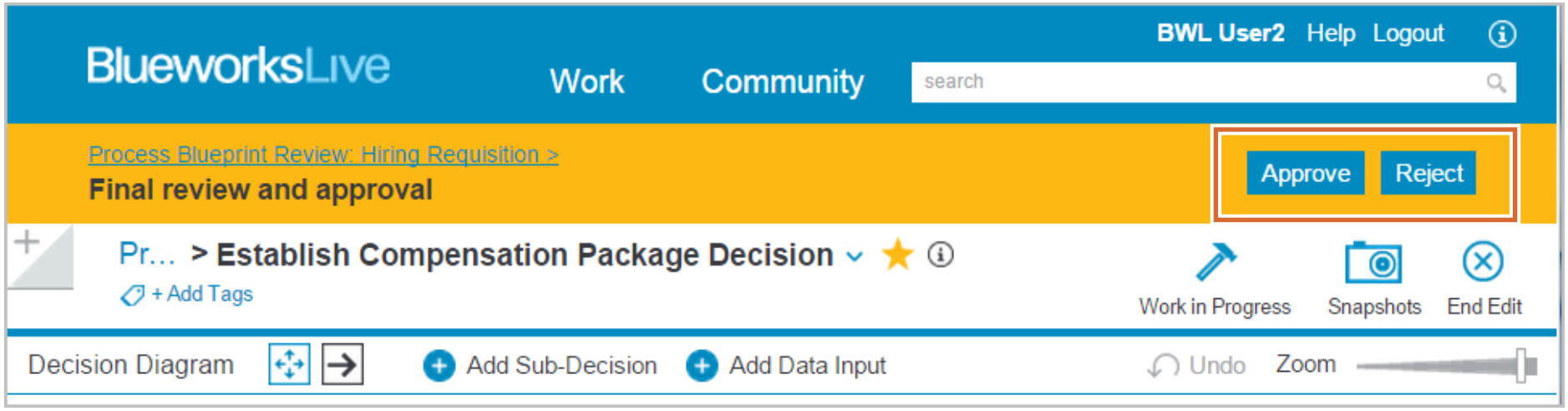
Participating (1 of 2)





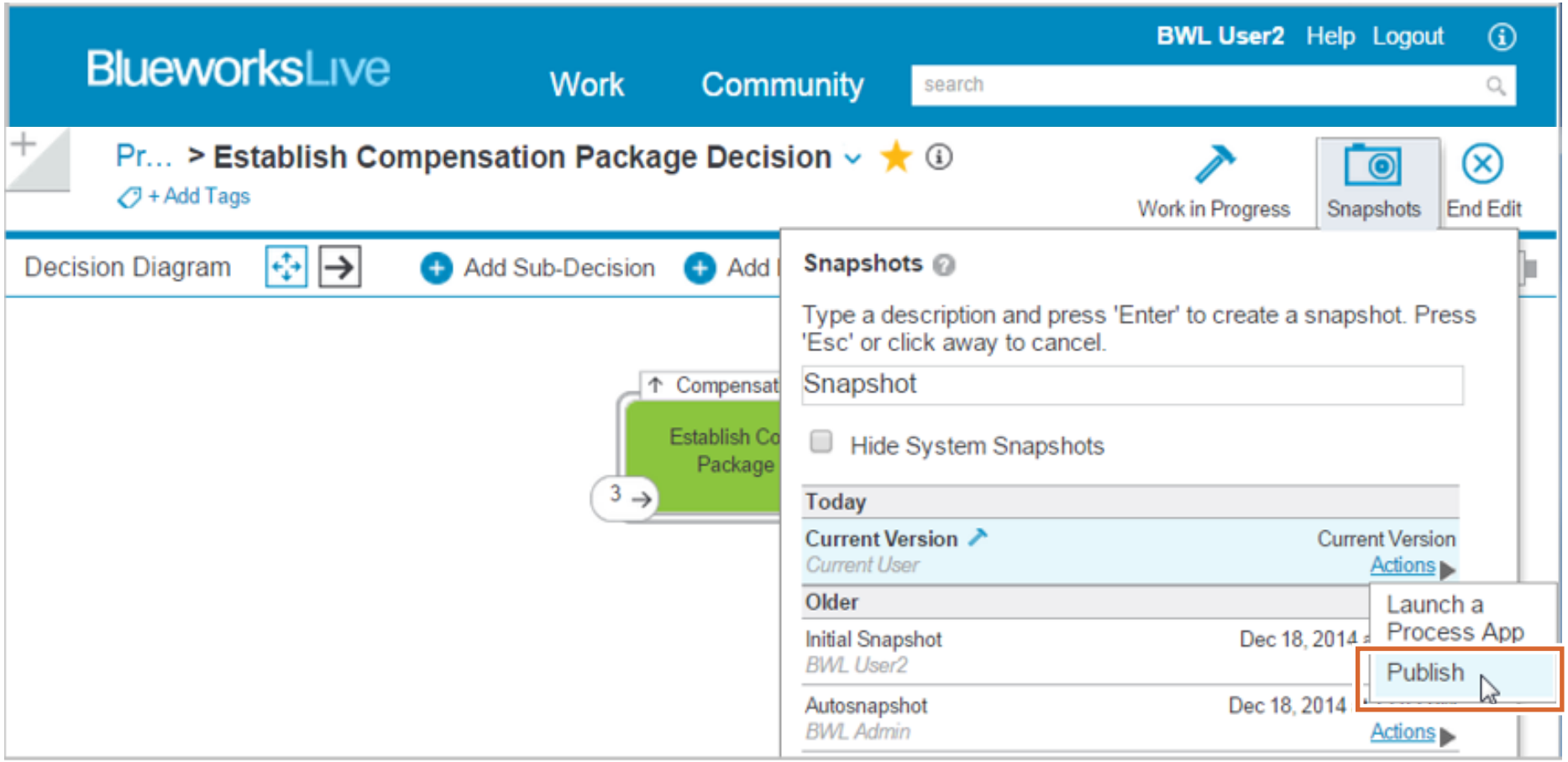
© Copyright IBM Corporation 2016

Participating (2 of 2)



© Copyright IBM Corporation 2016

Publishing



© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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

© Copyright IBM Corporation 2016

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.

© Copyright IBM Corporation 2016