Getting started with process maps
Getting started with process maps
## Contents

**Part 1. Introduction to mapping processes**  ........................................... 1

Chapter 1. Creating the sample Business Design space  ........................................... 3

Chapter 2. Creating a process map  ................................................................. 5

Chapter 3. Creating detailed process maps  ...................................................... 9

Chapter 4. Visualizing data flow  ................................................................. 13

Chapter 5. Validating your process map using the Process Advisor  .................. 17

**Part 2. Appendixes**  ................................................................. 19

Appendix. Notices and Trademarks  .......................................................... 21
  Notices  ................................................................. 21
  Trademarks and service marks  .......................................................... 23
Part 1. Introduction to mapping processes

Process maps are visual representations of business processes. Business processes are composed of activities and decisions that dictate when the activities occur. You can use process maps to document your current business processes or to plan future business processes. This tutorial guides you through the steps for creating a process map using WebSphere Business Compass.

Learning objectives

In this tutorial, you will learn how to:

• Create a sample space and sample documents to explore the WebSphere Business Compass business design features.
• Create a process map, including how to add different process map elements, such as tasks, decisions, and events, and how to connect those elements into a process flow.
• Add details to process map elements, including how to convert generic tasks to specialized activity types.
• Visualize the flow of business data throughout your process.
• Use the Process Advisor to evaluate your process map and identify areas that might require further work.

Time required

45 minutes
Chapter 1. Creating the sample Business Design space

In this lesson, you will create a sample Business Design space for completing the tutorial. You will own this space, and all of the documents that you create or update will be visible only to you, unless you explicitly grant access to other users.

To create the sample design space:

1. Log in to the WebSphere Business Space where WebSphere Business Compass is installed. If this is your first time logging in, the Business Design Home space opens. If the Business Design Home space does not open, click **Home** in the top-left corner. If this does not take you to the Business Design Home space, click **Manage Spaces** and then click **Business Design Home**.

2. On the Business Design Central page, click **Try**. Your sample space and sample documents are created, and you are automatically taken to the new space.

   Business Design spaces each consist of two pages:
   - An Overview page that includes a Getting Started widget where you can explore learning material, launch viewlets, or create documents, a Team widget that lists the space members, and a Recent Documents widget where your recently created sample documents are listed.
   - The Design page where you author and manage your business design documents.

3. To go to the Design page, click the **Design** tab. In the Design page, you see the Documents view where all of the sample documents are listed.

   From the Documents view, you can search for documents in the repository or make your documents public in the repository for others to see.

   Notice that the sample documents that you created in Step 2 are all visible in the Documents view. You can open these documents by clicking them.
Chapter 2. Creating a process map

In this lesson, you will learn how to create a process map and add process map elements. WebSphere Business Compass process maps follow the Business Process Modeling Notation (BPMN) standard for visualizing business processes. You will be introduced to several of the graphical elements that are included in the BPMN standard, and you will learn how to add these elements to your process map.

There are several types of elements that can make up a process map. Flow elements are the primary graphical objects that represent your process. There are three types of flow elements: activities, gateways, and events.

Activities represent the work that is done in a process. Tasks represent activities that cannot or do not need to be decomposed into detailed steps. Subprocesses are activities that have an internal structure, consisting of multiple tasks that are performed as a unit.

Let’s create a process map and add some of these elements.

Before you begin, make sure that you are in the Documents view of the Design page. You can open the Documents view by going to the Design page in your Business Design space and clicking the Documents tab.

1. In the Create toolbar, click the new process map button . A window opens for you to add a name and description.
2. In this case, call your map Customer Order Process. In the Description field, enter This is our current process for handling telephone orders. and then click OK.
3. Your new process map opens in the Process editor. When you first create a process map, some default elements are provided for you. You can keep these elements and rename them, or you can create your own. In this case, we are going to delete all the default elements.
   Select all the default elements by clicking in the canvas and dragging the selection rectangle over the entire map. Press the Delete key on your keyboard to delete all the elements in the map.
4. The first step in mapping processes is to add process map elements. There are a few ways to do this in the process editor. First, let’s look at the palette in the toolbar at the top of the editor.

When you first open the Process editor, the palette that is shown is the Simple palette. It contains the basic elements that you need to create a process map: generic tasks, exclusive gateway or decision, a start and end event to show
where your process begins and ends, and a note element for adding comments or annotations to your diagram. There is also a Detailed palette that you can view by clicking the drop-down arrow. We will use the Detailed palette later in this tutorial.

5. Add a task element from the palette by clicking **Task** and dragging the task element onto the canvas. Rename this new task **Answer Customer Call**.

6. Add another task element to the right of the first one, and call this one **Identify Required Department**.

7. Connect the **Answer Customer Call** task to the **Identify Required Department** task by clicking the connection handle in the bottom-right corner of the **Answer Customer Call** task and dragging it to the **Identify Required Department** task.

8. To add multiple tasks at once, click **QuickAdd**. Type the following task names into the text area, pressing Enter between each one:
   - Route Call to Correct Department
   - Answer Routed Call
   - Get Customer ID
   - Take Customer Order
   Each task is added to your process.

   **Tip:** There are other ways to add elements. You can click the plus sign icon that is on each connection to create an intermediate element between the two connected tasks. You could also copy and paste a complete list of tasks from a word processing application to quickly visualize all the steps in your process.

9. Connect the new task elements to the first two tasks that we created.

10. This time, let’s create a decision or exclusive gateway to the process.

    Hover over the icon on the connection between the **Answer Routed Call** and **Get Customer ID** tasks, and then click the green diamond to insert a new gateway.

    **Tip:** You could have also created this decision by dragging an exclusive gateway element from the palette onto the connection between the **Answer Routed Call** and **Get Customer ID** tasks.

11. Rename this new decision **Is Existing Customer?**.

12. Decisions have branches that represent the different paths a process can take. The **Is Existing Customer?** decision already has one branch that goes to the **Get Customer ID** task. Because the **Get Customer ID** task is the path that is taken when the customer is an existing customer, rename this branch to **Yes** by clicking the **Branch 1** label, and typing **Yes**.

13. Add a new branch to represent the path that is taken when the customer is new by dragging the connection handle on the lower right of the decision. Position the new task below the **Get Customer ID** task and rename it **Create Customer Account**.

14. Click the **Branch 2** label and rename it **No**.

15. Click the connection handle from the **Create Customer Account** task and connect it to the **Take Customer Order** task. Your diagram should look something like the following diagram.

In the next module, you will learn how to modify these basic elements to create specific activity types, including subprocesses and how to add attributes to your elements to provide additional information about your process.

You can complete the next lesson Chapter 3, “Creating detailed process maps”, on page 9 or you can jump to either one of the Chapter 4, “Visualizing data flow”, on page 13 or Chapter 5, “Validating your process map using the Process Advisor”, on page 17 lessons.
Chapter 3. Creating detailed process maps

In a real business environment, the first high-level sketch of a process might be mapped by one person, and it might be passed along to a business analyst or technical expert to further refine into a detailed process map. In the previous lesson, you created a process map that used the basic building blocks of process mapping: generic tasks and exclusive decisions. In this unit, you will learn how to create more detailed process maps by specifying different task types, grouping tasks into subprocesses, and adding element attributes such as performers.

Before you begin

If you closed your process map since completing the previous lesson, you need to re-open it and put it into Edit mode by clicking Edit in the upper-left corner of the Process editor.

1. In the previous section, you used only basic process modeling elements. In this section, you will need to use more advanced BPMN elements, which are available from the Detailed palette. Switch from the Simple palette to the Detailed palette by clicking the drop-down arrow in the top-right corner of the palette and selecting Palette (Detailed).

   On the Detailed palette, you can see the menu for each type of element by clicking the drop-down arrow under each element type. As with the Simple palette, you can drag elements from the palette onto the canvas.

2. Imagine that we have decided that the Create Customer Account task that we created in the previous lesson is actually a subprocess consisting of multiple steps or tasks. Click the activities drop-down arrow under the generic task element. All of the supported BPMN activity elements are displayed. Drag a subprocess element to on top of the Create Customer Account task. The generic task changes into a subprocess element.

   Tip: You can change any generic task into a specific task type, such as a service task or a human task by dragging the specific task from the palette to on top of an existing generic task.

3. Click the plus sign (+) to expand the new subprocess. Notice that the subprocess contains the same default elements that were created when you created the parent process: a start and an end event, and a generic task.

4. Let's reuse the default elements. Double-click the task and rename it Get Customer Information.

5. Add another task to the right of the Get Customer Information task by hovering over the icon that appears on the connection between the Get Customer Information task and the end event, and clicking the orange plus sign .

6. Name this new task Create Customer Record.

7. Now that we've mapped all of the steps in the process we can add details to the process map elements. Click Details in the View menu in the

© Copyright IBM Corp. 2010
The Details view opens, displaying the details for the selected element or for the whole process if no element is selected.

8. Different details are available for different element types. By default, only some of the available details are visible. To see all of the details that you can specify for a given element, click Show in the top-left corner of the Details view.

9. Let's add a performer to one of our tasks to indicate who will be performing the work. Select the Answer Customer Call element. (If you do not have it open already, open the Details view to show the attributes. You can open it by clicking Details on the toolbar or the details button button in the upper-right corner of the element.)

10. In the Performers section, click Add. A window opens where you can look up existing roles or create roles in your business vocabulary.

11. When you first created the JK Air sample space in the first lesson, a business vocabulary document was created for you that contains several different roles as well as other vocabulary items, such as terms, business items, and messages, that are used throughout the sample documents. To see all the roles that are defined in all the public vocabularies in the repository, type a * in the field, and then click the search button next to the field. To scan through the results, you can use the arrows at the bottom of the window. Because we know which role we are searching for (Sales Representative), we can search on part or all of the name. Type Sales in the search field and click .

12. Select the Sales Representative role from the results list, and click OK. The Sales Representative role has been added as a performer for this task.

   Note: You might see multiple instances of the Sales Representative role in the search results if other users have been creating their own business vocabulary documents in the repository, and have made these documents public for viewing. For the purposes of this lesson, it does not matter which instance of the Sales Representative role you select.

13. After you have added a performer to one or more of your activities, you might want to view your diagram in swimlane layout by role. To do this, click the layout button in the top-left corner of the canvas, and select Swimlane by Role.

14. There are more activities in this process that the Sales Representative performs. onto the Sales Representative swimlane.
   a. Drag the Get Customer ID, Create Customer Account, and Take Customer Order activities.
   b. Select the Take Customer Order task and click the details button in the upper-right corner of the task.

   You can see that the Sales Representative role has been added as a performer for this task.

Results

For more information about the BPMN elements that are available in WebSphere Business Compass and the attributes that you can specify for each, see the related topic in the information center:
The next lesson, Chapter 4, “Visualizing data flow”, on page 13, demonstrates how to represent business data in your process map. Complete this lesson next, or go directly to the last lesson, Chapter 5, “Validating your process map using the Process Advisor”, on page 17.
Chapter 4. Visualizing data flow

After you have mapped your tasks and added details, such as who performs an activity, you might also want to show the data that is associated with the activities and events in your process. For example, the Create Customer Account activity generates a customer account record that will be passed along as data to subsequent activities. In this lesson, you will create the customer account business item in the JKAir business vocabulary, a document that was created with the sample design space in the first lesson of the tutorial, and add it to your process map as the output of one activity that is passed along to the next activity in the flow.

Before you begin

If you closed your process map since completing the previous lesson, you need to re-open it and put it into Edit mode by clicking **Edit** in the upper-left corner of the Process editor.

About this task

1. Switch from the Simple palette to the Detailed palette by clicking on the drop-down arrow in the top-right corner of the palette and selecting **Palette (Detailed)**.

2. Below the Note menu item, click the drop-down arrow and drag a data object element onto the canvas near the Take Customer Order task. Double-click the label below the new data object and rename it **Customer Account**.

3. Drag the connection handle on the Create Customer Account task to the Customer Account data object.

4. Notice that the data object has a connection handle similar to the activity and gateway elements. Drag this handle to connect the data object to the Take Customer Order activity. Your diagram now depicts the flow of data from one activity to another, and should look something like the following diagram.
Currently, the data flow that you have created is only a visual representation and is not linked to any specific type of business data. When you are modeling business processes for documentation, you might not need more detail to describe your process.

In this lesson, however, we want to associate the Customer Account data object to a business item in our business vocabulary. That way, other people viewing our process map will know exactly what type of data is being passed from the Create Customer Account activity to the Take Customer Order activity.

Open the Details view for the Customer Account data object either by selecting the element and clicking **Details** on the toolbar, or by clicking in the upper-right corner of the element.

To associate a business item with the output of this activity, click **Choose** in the Associated Business Item section.

Notice that there are several simple data types that you could specify for your output, such as text, or number, for when your output consisted of a single number or item of text. Because our Customer Account output will contain more complex data about customers, select **Business Item** from the list of available types.

The Search Vocabularies for Business Items window opens.

To create a business item, click **New Entry**.

Type **Customer Account** in the field, and click **Save**. The Customer Account business item is created in the business vocabulary. You can further define this business item, for example to specify which fields it contains, by editing the business vocabulary document that contains it. For more information about editing business vocabularies, see the related topic in the information center: [http://publib.boulder.ibm.com/infocenter/dmndhelp/v7r0mx/topic/com.ibm.btools.help.bleader.doc/doc/bus_vocab/glos_intro.html](http://publib.boulder.ibm.com/infocenter/dmndhelp/v7r0mx/topic/com.ibm.btools.help.bleader.doc/doc/bus_vocab/glos_intro.html).

Now you can locate the business item that you just created in the vocabulary by typing **Customer Account** in the search field and clicking the search button .

Select the **Customer Account** business item from the results list and click **OK**.

Open the Details view for the Create Customer Account activity. When you connected this activity to a data object, a data output was automatically added to this activity. However, no data type is currently associated with this data output. If you had specified the business item on the data object first, and
then connected the activities to the data object, this business item would have automatically been specified as the data type for this object.

You can synchronize the data types for connected elements by clicking the button on an element and selecting Change this output type to match the type of data object. The data type of the activity output is now Customer Account, which matches the type of the connected data object.

12. Follow the same steps to synchronize the data type of the input for the Take Customer Order activity.

**Results**


The next lesson, Chapter 5, “Validating your process map using the Process Advisor”, on page 17 demonstrates how you can use the Process Advisor feature to evaluate your process map and identify areas that might require further work.
Chapter 5. Validating your process map using the Process Advisor

Process mapping is often performed iteratively, with process details being added and refined over time. A process map can be simple, showing only the high-level elements that make up the process, or it can be complex, where every element in the process is fully specified. The Process Advisor provides guidance when you want to provide additional details, for example, when you are planning to use your process map for eventual automation or when you want to conform to standard modeling conventions. In this lesson, imagine that a team member has completed a first draft of the Customer Order Handling process, adding all the elements and details as she could think of in her first pass. Now you are going to review the process to see which elements could use further specification before you begin work with a business process engineer who will automate the process.

Before you begin

If you closed your process map since completing the previous lesson, you need to re-open it and put it into Edit mode by clicking Edit in the upper-left corner of the Process editor.

1. Open the Process Advisor view by clicking on Advisor in the View menu of the toolbar. The Process Advisor provides several recommendations, such as places where additional element details could be provided, places where input and output data types do not match, missing standard modeling elements, such as start and stop events, and elements that are not connected properly in the process map. You can select which parts of the process map you want the Process Advisor to check, and you can select which type of advice you want the Process Advisor to apply.

2. Use the default selection option, which is provide all type of advice on all elements. To start the validation, click the Start button at the bottom of the Process Advisor panel.

3. By default, the Process Advisor stops on the first element that it has recommendations for. In the Customer Order Handling process map, the first element is flagged with two recommendations. Select the first activity in the process and click to see the areas of improvement that have been identified.

4. Click Show Suggestion to see the recommended fix. In some cases, a Fix this for me option is available to have the tool automatically implement the suggested change.

5. Continue running the Process Advisor tool by clicking Continue at the bottom of the Process Advisor panel.
What to do next

You can re-run the Process Advisor as many times as you want as you develop your process map, which is especially useful in situations where process maps are very large and are developed in stages, potentially by different team members.
Part 2. Appendixes
Appendix. Notices and Trademarks

Notices

This information was developed for products and services offered in the U.S.A.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this documentation does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte character set (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

IBM World Trade Asia Corporation
Licensing
2-31 Roppongi 3-chome, Minato-ku
Tokyo 106-0032, Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law:
INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web
sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

*Intellectual Property Dept. for WebSphere Software*  
*IBM Corporation*  
*3600 Steeles Ave. East*  
*Markham, Ontario*  
*Canada L3R 9Z7*

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, the results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurements may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

All statements regarding IBM’s future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

All IBM prices shown are IBM’s suggested retail prices, are current and are subject to change without notice. Dealer prices may vary.

This information is for planning purposes only. The information herein is subject to change before the products described become available.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

**COPYRIGHT LICENSE:**
This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs.

Each copy or any portion of these sample programs or any derivative work, must include a copyright notice as follows:

© (your company name) (year). Portions of this code are derived from IBM Corp. Sample Programs. © Copyright IBM Corp. _enter the year or years_. All rights reserved.

If you are viewing this information softcopy, the photographs and color illustrations may not appear.

**Programming interface information**

Programming interface information, if provided, is intended to help you create application software using this program.

General-use programming interfaces allow you to write application software that obtain the services of this program’s tools.

However, this information may also contain diagnosis, modification, and tuning information. Diagnosis, modification and tuning information is provided to help you debug your application software.

**Warning:** Do not use this diagnosis, modification, and tuning information as a programming interface because it is subject to change.

---

**Trademarks and service marks**

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corporation in the United States, other countries, or both. If these and other IBM trademarked terms are marked on their first occurrence in this information with a trademark symbol (© or ™), these symbols indicate U.S. registered or common law trademarks owned by IBM at the time this information was published. Such trademarks may also be registered or common law trademarks in other countries. A current list of IBM trademarks is available on the Web at ‘[Copyright and trademark information](http://www.ibm.com/legal/copytrade.shtml)’ at www.ibm.com/legal/copytrade.shtml.

Adobe, the Adobe logo, PostScript, and the PostScript logo are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States, and/or other countries.

Java and all Java-based trademarks and logos are trademarks of Sun Microsystems, Inc. in the United States, other countries, or both.

Linux is a registered trademark of Linus Torvalds in the United States, other countries, or both.
Readers’ Comments — We'd Like to Hear from You

WebSphere Business Compass Version 7
Getting started with process maps

We appreciate your comments about this publication. Please comment on specific errors or omissions, accuracy, organization, subject matter, or completeness of this book. The comments you send should pertain to only the information in this manual or product and the way in which the information is presented.

For technical questions and information about products and prices, please contact your IBM branch office, your IBM business partner, or your authorized remarketer.

When you send comments to IBM, you grant IBM a nonexclusive right to use or distribute your comments in any way it believes appropriate without incurring any obligation to you. IBM or any other organizations will only use the personal information that you supply to contact you about the issues that you state on this form.

Comments:

Thank you for your support.
Send your comments to the address on the reverse side of this form.
If you would like a response from IBM, please fill in the following information:

Name
Address
Company or Organization
Phone No.
E-mail address