

# IBM Cloud Pak for Business Automation

## Demos and Labs

Operational Intelligence

IBM Business Automation Insights

*Build Business Performance Center Dashboard*

CP4BA 2023.0.1 IF 2

Lab version: 1.1

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# 1 Lab Introduction

In the lab, you will learn how to build and use the Business Performance Center to create dashboards and provide insights into a Client Onboarding solution for a line of business users.

## 1.1 Introduction to IBM Business Automation Insights

IBM Business Automation Insights (BAI) processes event data from the connected IBM Business Automation products so that you can derive insights into the performance of your business. You can use this data to drive automation and visualize the state of the KPIs in dashboards that matter most to the line of business in near real-time.

See a high-level BAI architecture in the figure below. Additional technical information is available in the Appendix of this lab guide.

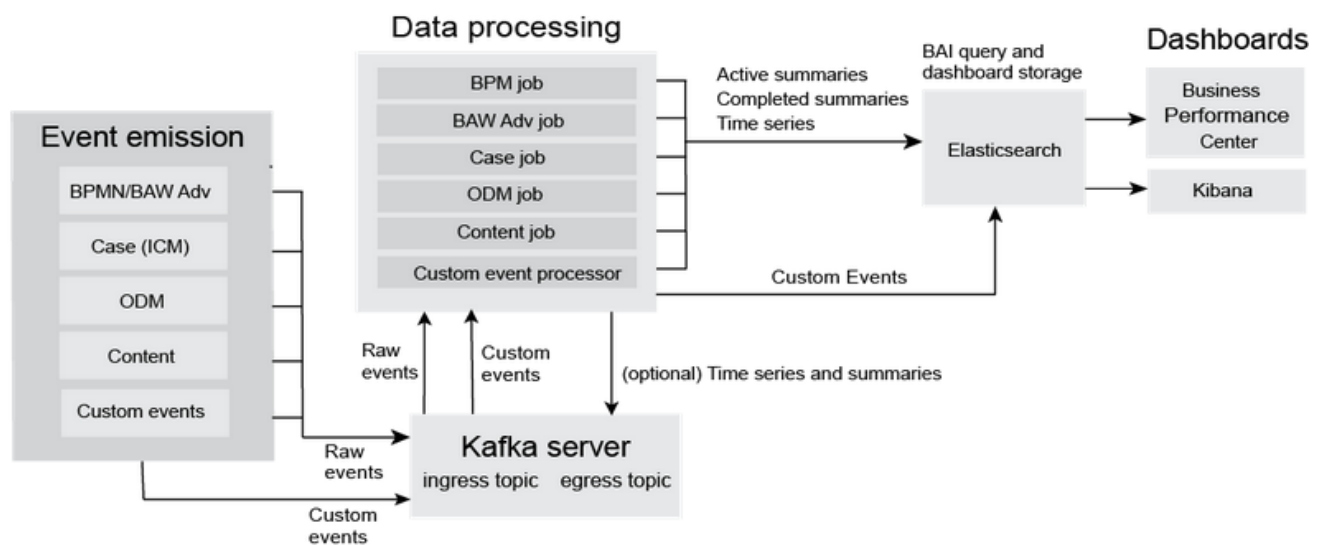


Figure 1. IBM Business Automation Insights Architecture

Business Performance Center (BPC), shown in Figure 1 above, is the no-code business monitoring application native to IBM Cloud Pak for Business Automation. Using BPC business users (with no IT assistance) can:

- Design and share dashboards in minutes that capture business data in near real-time and provide awareness of essential business activities and processes.
- Prepare, track, and design visualizations of metrics, key performance indicators (KPIs), and other business performance measurements in customizable dashboards.

## 1.2 Lab Overview

The solution used during the labs is the *Client Onboarding* workflow automation implemented as a Case with several BPMN processes implementing case activities. The automation contains a single Case Type *Client Onboarding Request*, which includes activities that need to be performed, data, documents, and conditions that drive the processing.

## Client Onboarding Request

Case Type Properties Views Case Folders Stages Rules **Activities**

All activities ⓘ 🔒

**Required activities**

- Initialize Request**  
File selected documents to the Case folder and handle pending  
Precondition: Case Start  
Set: <None>
- Notification**  
Notify the client and client rep that the review has been  
Precondition: Stage started: Notification  
Set: <None>
- Perform Scoreboarding**  
Scoreboard the client (Classifies them into a segment and assess  
Precondition: Stage started: Scoreboarding  
Set: <None>
- Update Backend Systems**  
Update backend systems with client information  
Precondition: Stage started: Backend Systems Up...  
Set: <None>

**Optional activities**

- Review Client Documents**  
Renew any new documents coming in from the client  
Precondition: Documents: Any document  
Property ...  
Set: <None>

BPMN processes (shown below) implement all five Case Activities above in an automatically generated Process App (Client Onboarding).

IBM Automation

Business automations /

**Client Onboarding**

Process App Settings (Read-only)

Client Onboarding

**Processes**

User interface

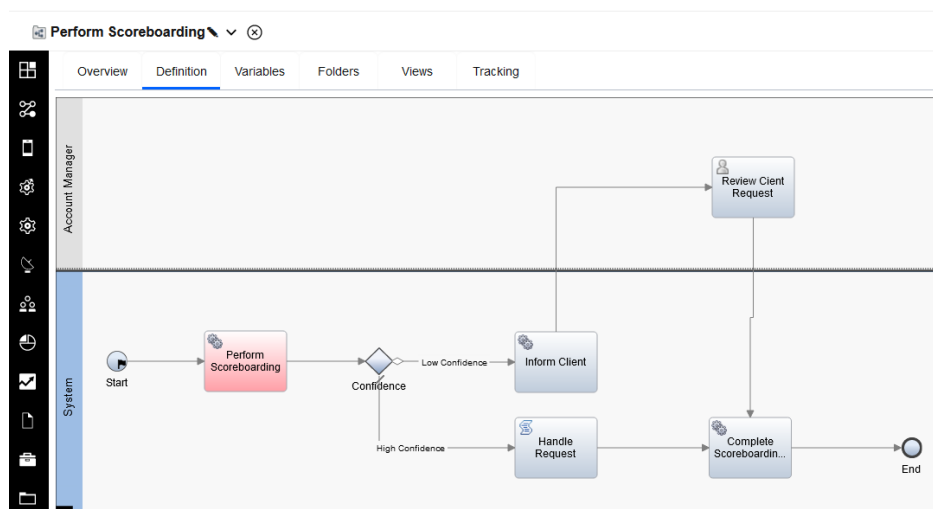
Exposed Automation Services

Type Processes

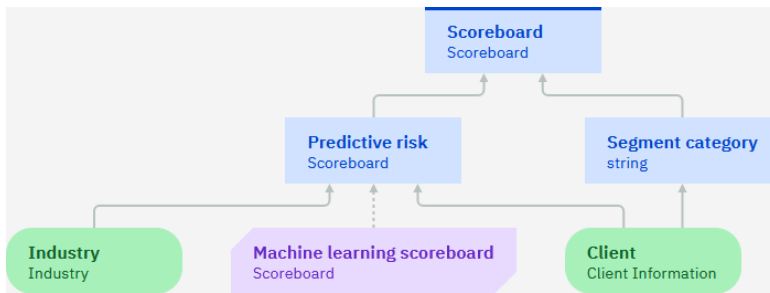
Process 6

- Initialize Request
- New Client Onboarding Request
- Notification
- Perform Scoreboarding
- Review Client Documents
- Update Backend Systems

The *Perform Scoreboarding* Activity (highlighted red below) is particularly interesting. It uses Automation Services to invoke Scoreboard decisions implemented using Automation Decision Services (ADS).



The Scoreboard ADS decision determines if a client is risky using a Machine Learning-based predictive model and classifies the client into a segment.



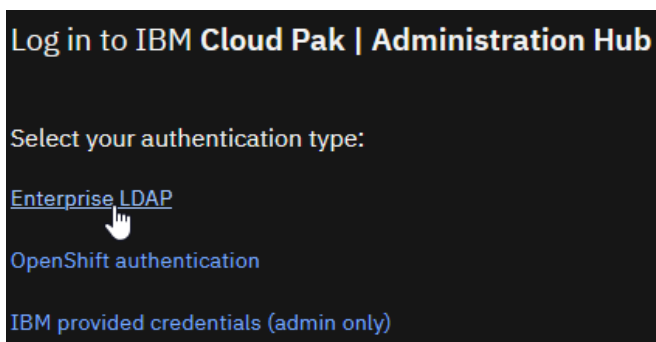
When authoring one of the Charts on the Dashboard, you will use data generated by the above decision.

## 1.3 Lab Setup Instructions

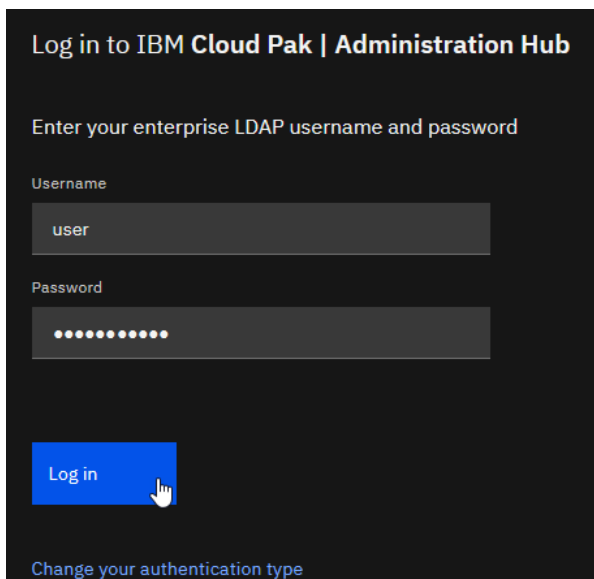
If you are performing this lab as part of an IBM event, access the document that lists the available systems, URLs, and login instructions. You will need to access the IBM Business Performance Center for this lab.

\_1. Paste the Business Performance Center URL to your web browser.

Select the **Enterprise LDAP** login option.



\_2. Enter the *Username* and *Password* supplied to you and then click **Log in**.

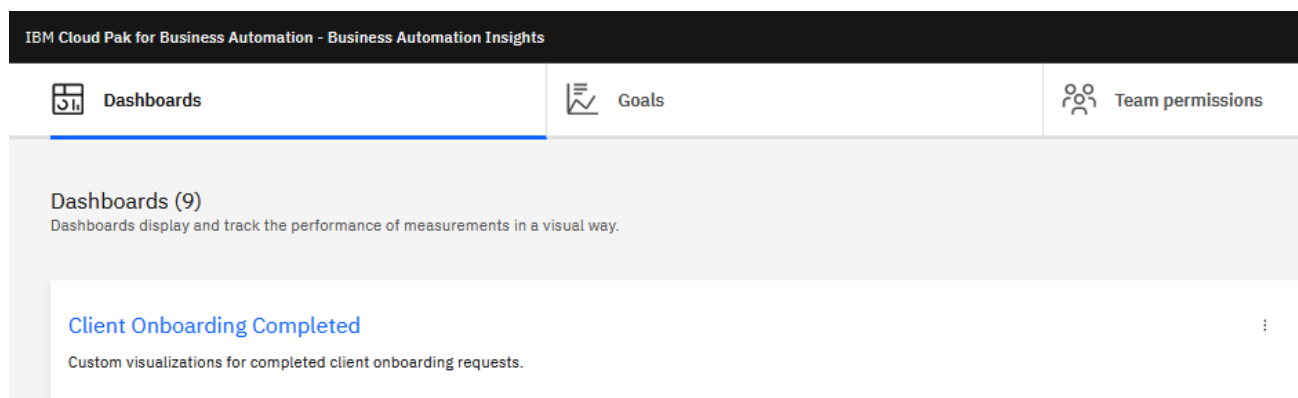


## 2 Exercise: Create a Client Onboarding Workflow Dashboard

### 2.1 Introduction

In this lab exercise, you will use BPC to create a business dashboard to enable a business user to get near real-time business insight into the *Client Onboarding* workflow.

In addition to built-in dashboards delivered with BPC that provide you with many great generic charts for workflow, decisions, and content, a reference version of the Dashboard specific to the Client Onboarding business metrics and KPIs that you will build in the lab exercise (called **Client Onboarding Completed**) has already been created for you.



If you like, you can refer to it when building your dashboard version.

**Note** that BAI events were already generated for you. But, since you are using a live shared environment with you and other users working on Client Onboarding cases, you may see new events arriving as you author your Dashboard. Consequently, some screenshots in the lab instructions may not look the same as your environment.

### 2.2 Exercise Instructions

In this lab exercise, you will author and configure the following BPC artifacts:

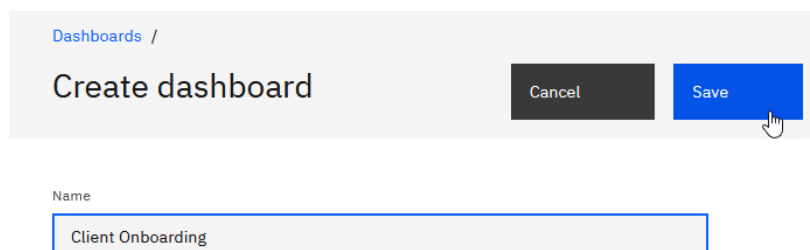
- Client Onboarding **Dashboard**
- **Charts** used in the Client Onboarding dashboard
- A chart **Alert**
- A **Goal** to aggregate related charts

#### 2.2.1 Create a Dashboard

\_1. Click **Create +**



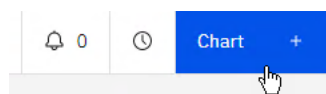
\_2. For *Name*, enter **Client Onboarding** and click **Save**.



## 2.2.2 Create "Average Revenue from Service Fees for Approved Clients" Chart

This gauge chart will show the average revenue from service fees for approved clients.

\_1. Click **chart +**



Enter the following and then click **Create**

Item	Value
Name	Average Revenue from Service Fees for Approved Clients
Select measurement	KPI

Client Onboarding ×

Create chart

Name

Average Revenue from Service Fees for Approved Clients

Description (optional)

Select measurement

Metric

90%

A performance indicator based on data items, constants, and other metrics that helps you

Period metric

A representation of metric values measured over time.

KPI

A type of metric that shows the degree to which business objectives are on track.

Period KPI

A representation of KPI values measured over time so that you can spot historical trends.

Data

A set of data items presented in a table.

Cancel

Create

### 2.2.2.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding ▼

This will select events from the Client Onboarding workflow.

\_2. In *Aggregation*, for *Function*, select **Average**, and *Data item*, choose **CO\_ServicesFee (data) – (long)**

#### Aggregation

Function

Average ▼

Data item

CO\_ServicesFee (data) - (long) ▼

Note. If you wonder where this Case property comes from, read the explanation below.

The CO prefix in CO\_ServicesFee is the Client Onboarding Solution prefix.

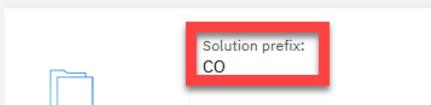
## Client Onboarding

Overview

Properties

Roles

In-baskets



ServicesFee in CO\_ServicesFee is the name of the Client Onboarding case property.

## Client Onboarding

Overview

Properties

Roles

In-baskets

Documents

Business Objects

Pages

Case Types

Property Definitions ⓘ

OK All ✓

Manage Choice Lists 📄

Services Fee

Integer



Fee being chaged for the services requested

Services Requested

String



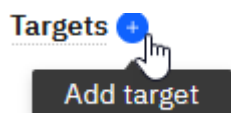
The services requested by the client

For the BAI Case Emitter to add this property to the emitted events, the Client Onboarding Audit Configuration includes this property.

A screenshot of the IBM Business Automation Workflow Case administration console. The 'Manage Audit Configuration' page is active. It shows a table with columns: Object Type, Object Name, Property Name, and Property Symbolic Name. The first row is highlighted with a red box, showing 'Case' as the Object Type, 'Client Onboarding Request' as the Object Name, 'Services Fee' as the Property Name, and 'CO\_ServicesFee' as the Property Symbolic Name. The second row shows 'Case' as the Object Type, 'Client Onboarding Request' as the Object Name, 'Services Requested' as the Property Name, and 'CO\_ServicesRequested' as the Property Symbolic Name. Navigation buttons (Back, Next, Save, Apply, Cancel) are visible at the top.

Let's continue with the lab instructions.

\_3. Click **Targets +**



\_4. For *Value*, enter **80000**

Targets +

Label

Value

New target

80,000





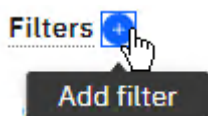
### 2.2.2.2 Define Filter Data

When selecting the Monitoring source, you specified **Workflow (Case) – Client Onboarding**. This setting allows you to work with the instances of the Client Onboarding workflow. Filters allow you to select specific data you want to display in your chart.

\_1. Select the **Filters** tab.



\_2. Click the **Filter +** button.



\_3. Select the following values from the dropdown list:

Item	Value
Data item	CO_ApprovalStatus (data) – (keyword)
Operator	=
Value	Approved

Your Filter setting should look exactly like this:

Data item	Operator	Value
CO_ApprovalStatus (data) - (keyword) ▼	= ▼	Approved

### 2.2.2.3 Define Visualization

This setting allows you to customize your Chart display settings.

\_1. Select the **Visualization** tab.



\_2. Enter the following values:

Item	Value
Min	0
Max	100000
Unit	\$

Your Gauge setting should look exactly like this:

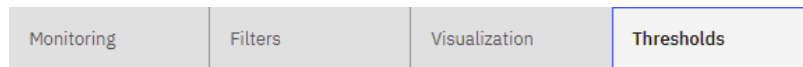
#### Gauge settings

Min	Max
0	100,000
Unit	
\$	

#### 2.2.2.4 Define Thresholds

This setting allows you to customize the Gauge threshold setting.

\_1. Select the **Thresholds** tab.



\_2. Click the **Thresholds +** button **two times**.



\_3. For each group, enter the following values:

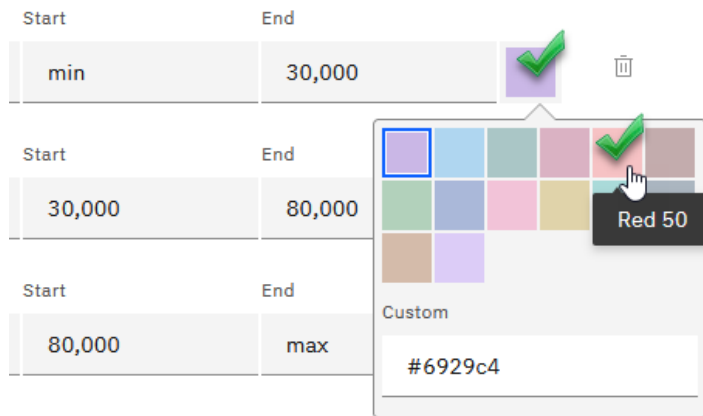
s	Data item	Value
1	Threshold name	Below
	Value	30000
	Range name 1	Poor
	Range name 2	Good
2	Threshold name	Above
	Value	80000
	Range name	Excellent

Your Thresholds setting should look exactly like this:

##### Thresholds +

Threshold name	Value	Range name	Start	End	
Below	30,000	Poor	min	30,000	
		Average	30,000	80,000	
Above	80,000	Excellent	80,000	max	

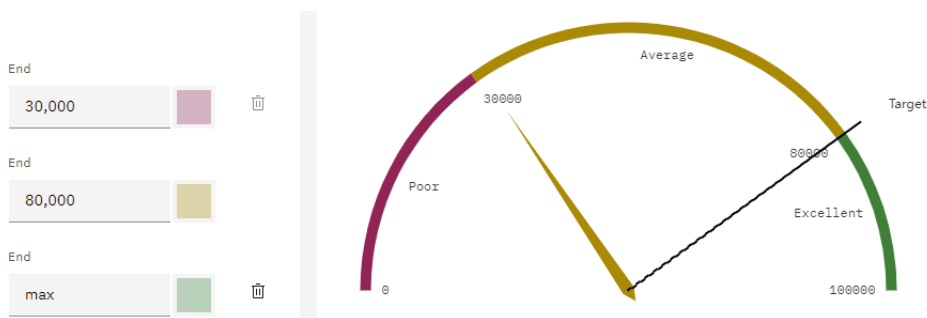
\_4. Click the color patch next to 30,000 and then select the **Red color patch** from the palette.



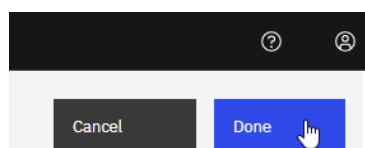
\_5. Using the above steps, customize the other two colors.

Item	Value
80,000	Yellow
max	Green

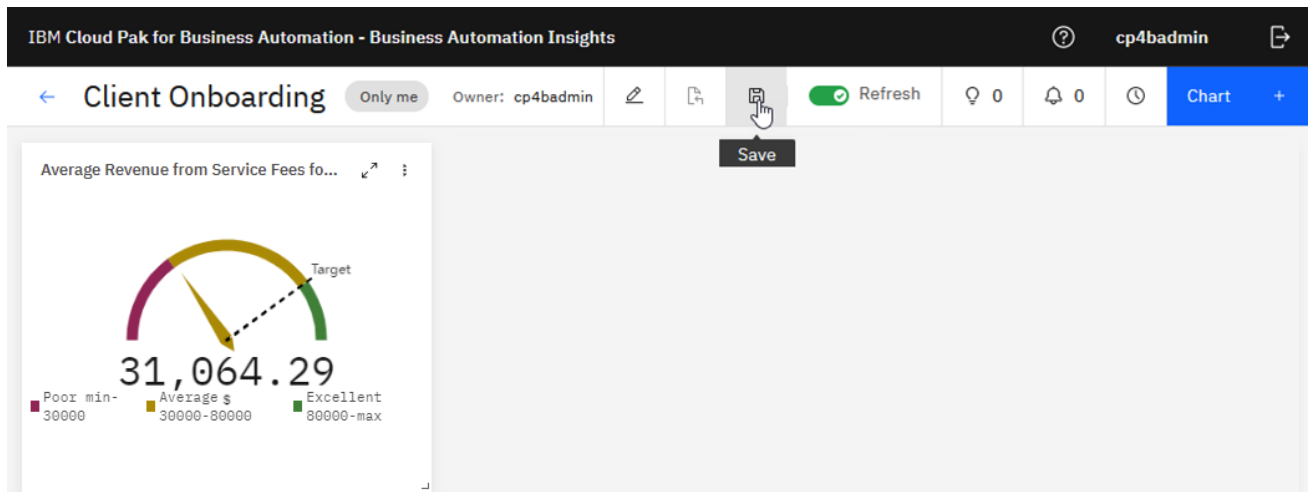
The color settings should look exactly like this:



\_6. Click **Done**



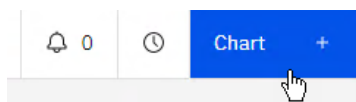
\_7. Click the **Save icon** on the toolbar above the Dashboard to save your work!



## 2.2.3 Create "Approvals by Industry" Chart

This hierarchical pie chart will show the state of each industry's approvals (Approved, Rejected, Under Review).

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**

Item	Value
Name	Approvals by Industry
Select measurement	Metric

Client Onboarding

×

Create chart

Name

Approvals by Industry ✓

Description (optional)

Select measurement

Metric

90%

A performance indicator based on data items, constants, and other metrics that helps you monitor your business activities.

Period metric

A representation of metric values measured over time.

KPI

A type of metric that shows the degree to which business objectives are on track.

Period KPI

A representation of KPI values measured over time so that you can spot historical trends.

Data

A set of data items presented in a table.

Cancel

Create ✓

### 2.2.3.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

\_2. Click the **Group by +** button two times.

#### Group by +

\_3. Enter the following values for the *Group by* entries:

Item	Value
1	CO_ApprovalStatus (data) – (keyword)
2	CO_Industry (data) – (keyword)

#### Group by +

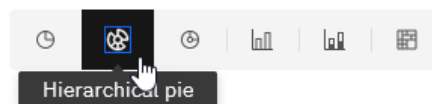
CO\_ApprovalStatus (data) - (keyword)

CO\_Industry (data) - (keyword)

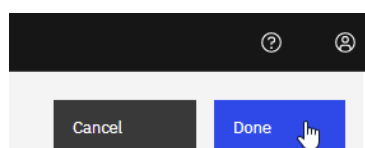
\_4. For the chart, type select **Hierarchical pie**.

#### Metric

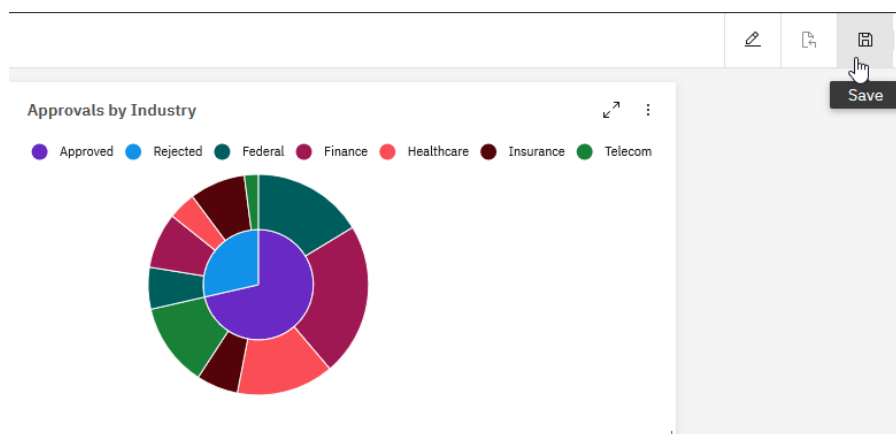
Hierarchical pie



\_5. Click **Done**



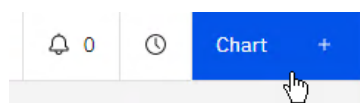
\_6. Click the **Save** icon on the toolbar above the Dashboard to save your work!



## 2.2.4 Create "Services Subscription by Industry with Drilldowns" Chart

This pie chart will show the service subscriptions by industry. Another feature of this chart is drilling down by service > industry > country.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**.

Item	Value
Name	Services Subscription by Industry with Drilldowns
Select measurement	Metric

Client Onboarding

×

Create chart

Name

Services Subscription by Industry with Drilldowns ✓

Description (optional)

Select measurement

Metric

90%

A performance indicator based on data items, constants, and other metrics that helps you monitor your business activities.

Period metric

A representation of metric values measured over time.

KPI

A type of metric that shows the degree to which business objectives are on track.

Period KPI

A representation of KPI values measured over time so that you can spot historical trends.

Data

A set of data items presented in a table.

Cancel

Create ✓

### 2.2.4.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding ▼


\_2. Click the **Group by +** button three times.

#### Group by +


\_3. Enter the following values for the *Group by* entries:

Item	Value
1	CO_Industry (data) – (keyword)
2	CO_ServiceRequested (data) – (keyword)
3	CO_AddressCountry (data) – (keyword)


\_4. Drill-down groups should look exactly like this:


**Group by** 

You can drill-down to get the details of each group on the chart.

CO\_Industry (data) - (keyword) 

The following groups may be accessed by drilling-down into the chart:

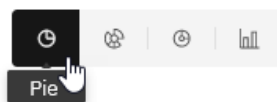
CO\_ServicesRequested (data) - (keyword) 

CO\_AddressCountry (data) - (keyword) 

\_5. For chart type, select **Pie** (this should be the default)

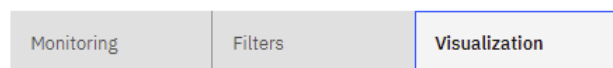
**Metric**

Pie



#### 2.2.4.2 Define Visualization Information

\_1. Click the **Visualization** tab.



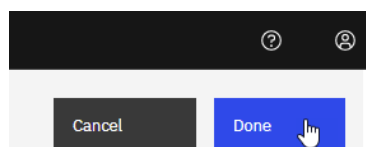
\_2. For *Pie settings > unit*, enter **Drill-down Legend**.

**Pie settings**

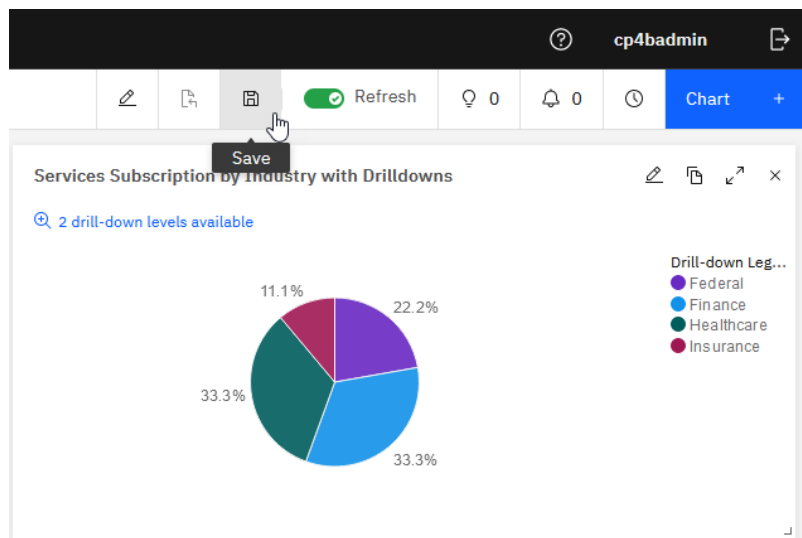
Unit

Drill-down Legend

\_3. Click **Done**

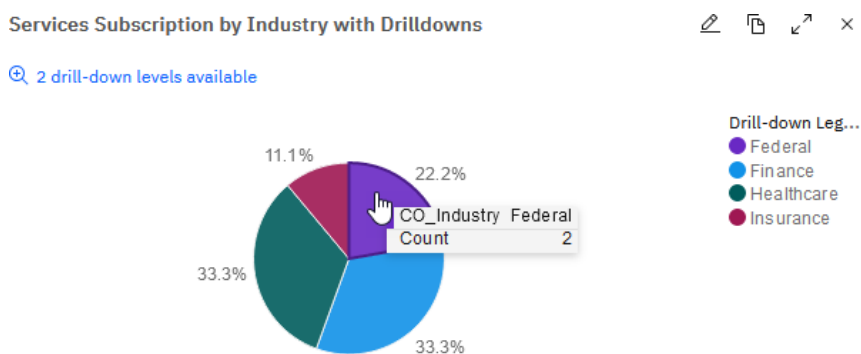


\_4. Click the **Save** icon on the toolbar above the Dashboard to save your work!

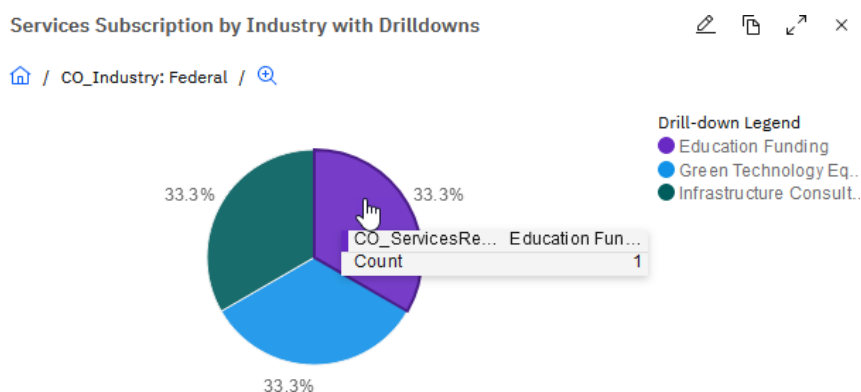


### 2.2.4.3 Explore Drill-down capability

\_1. Select the first drill-down level by clicking on **Federal (purple)** Industry.

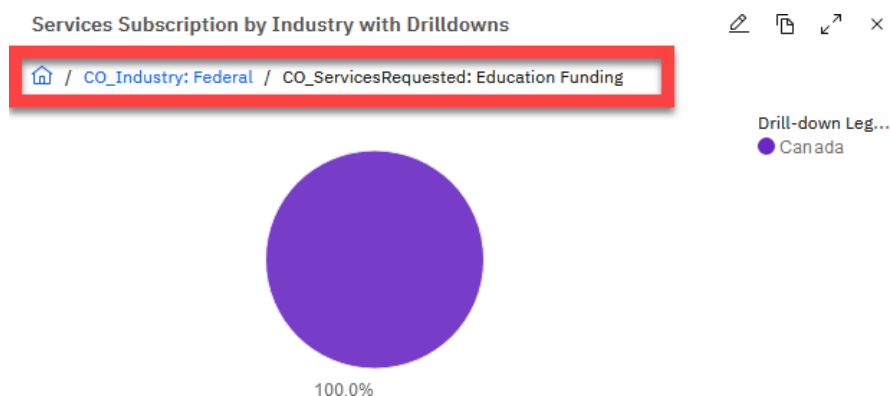


\_2. Select the second drill-down level by clicking on **Education Funding (purple)** Service

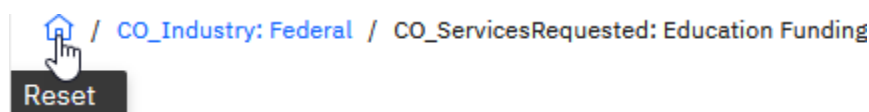




\_3. You should now see all the countries for *Federal > Education Funding* grouping shown on the readcrumbs,



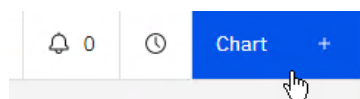
\_4. Click **Reset** to get back to the original view.



## 2.2.5 Create "Highest Service Fee by Industry Sector" Chart

This bar chart will show the highest service fee by industry sector.

\_1. Click **chart +**



\_2. Enter the following and then click **Create**.

Item	Value
Name	Highest Service Fee by Industry Sector
Select measurement	Metric

### 2.2.5.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

\_2. In *Aggregation*, for *Function* select **Max** and for *Data item* select **CO\_ServicesFee(data) – (long)**

#### Aggregation

Function

Max

Data item


CO\_ServicesFee (data) - (long)

\_3. Click **Group by +** button.

#### Group by

\_4. Enter **CO\_Industry (data) – (keyword)**

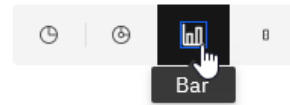
Group by 

CO\_Industry (data) - (keyword) 

\_5. For chart type, select **Bar**

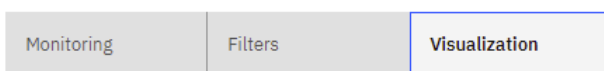
Metric

Bar



### 2.2.5.2 Define Visualization Information

\_1. Click **Visualization** tab



\_2. For *Bar settings*, enter:

Item	Value
X-axis label	Industry
Y-axis label	Maximum Service Fee [\$]

#### Bar settings

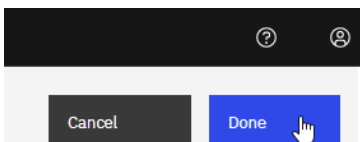
X axis label

Industry

Y axis label

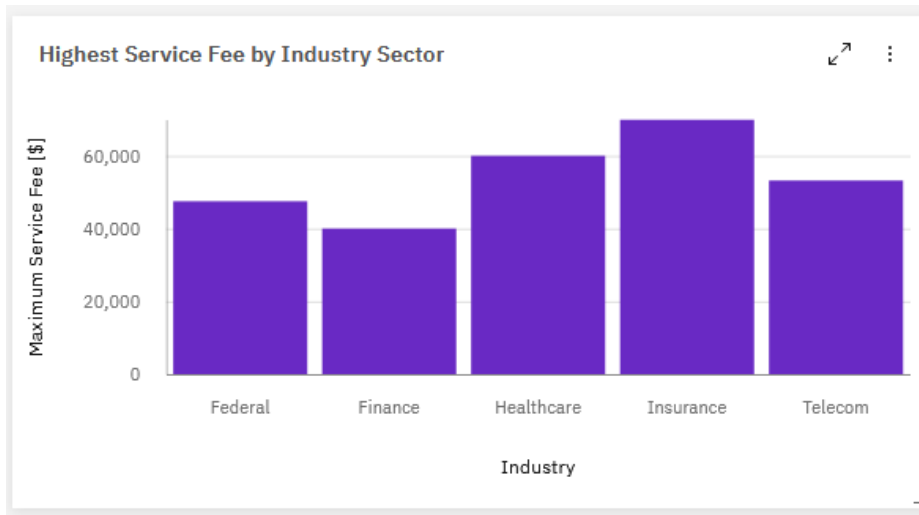
Maximum Service Fee [\$]

\_3. Click **Done**



\_4. Click the **Save** icon on the toolbar above the Dashboard to save your work!

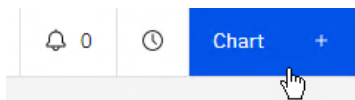
\_5. Your chart should look similar to this:



## 2.2.6 Create "Approval Count of High-Risk Cases" Chart

This bar chart will show the approval counts for high-risk cases in a given period. High-risk cases are identified by the decision service (which uses a Machine Learning (ML) service to score risk level). This is an essential metric, indicating that the approver overrode the ML model decision. Therefore, the ML model may be inaccurate and need re-training.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**.

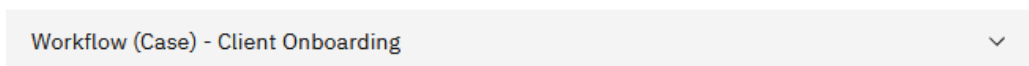
Item	Value
Name	Approval Count of High-Risk Cases
Select measurement	Period metric

### 2.2.6.1 Define Monitoring Information

\_1. For *Monitoring source*, select Workflow (Case) – Client Onboarding.

#### Monitoring context

Monitoring source



\_2. On *Interval*, change the setting to **Minutes(s)**

#### Interval

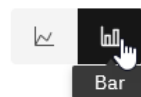
Time interval



\_3. For chart type, select **Bar**

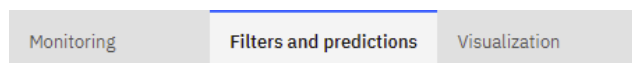
## Period metric

Bar

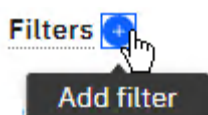


### 2.2.6.2 Define Filters and Predictions

\_1. Select **Filters and predictions** tab



\_2. Click the **Filter +** button **twice** to add two filters.



\_3. For each group, select the following values from the dropdown list:

Group	Data item	Operator	Value
1	CO_HighRisk (data) – (boolean)	=	true
2	CO_ApprovalStatus (data) – (keyword)	=	Approved

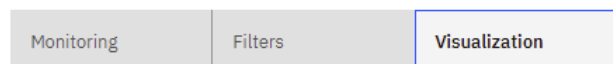
Your Filters setting should look exactly like this:

Filters +

Data item	Operator	Value
CO_HighRisk (data) - (boolean) ▼	= ▼	true
AND		
Data item	Operator	Value
CO_ApprovalStatus (data) - (keyword) ▼	= ▼	Approved

### 2.2.6.3 Define Visualization Information

\_1. Click **Visualization** tab



\_2. For *Bar settings*, enter:

Item	Value
X-axis label	Date
Y-axis label	Approvals

#### Trend settings

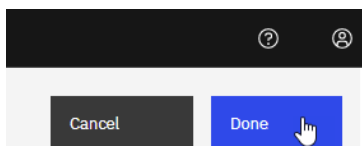
X axis label

Date

Y axis label

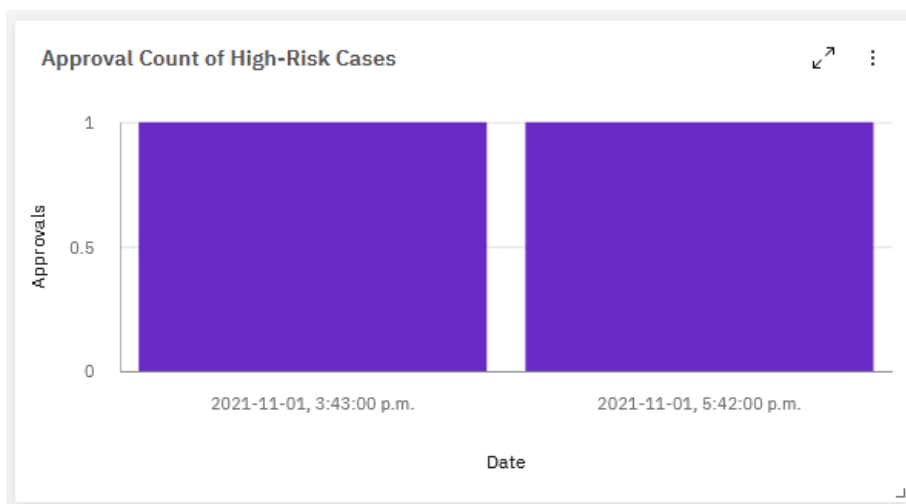
Approvals

\_3. Click **Done**



\_4. Click the **Save** icon on the toolbar above the Dashboard to save your work!

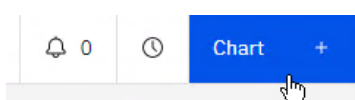
\_5. Your chart should look similar to this.



## 2.2.7 Create "Average Approval Confidence by Industry Sector and Revenue" Chart

You will now create a bubble chart. The bubble color will indicate the industry. The bubble size will indicate how many cases were under a given industry. The bubbles will be positioned in a grid with X-Axis as the average revenue and Y-Axis as the average approval confidence level.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**.

Item	Value
Name	Average Approval Confidence by Industry Sector and Revenue
Select measurement	Metric

### 2.2.7.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

\_2. Click the **Aggregation +** button **twice** to add two aggregations.



Note that two Aggregations were added below Count

#### Aggregation

Function	Data item
Count	Select a data item
Sum	CO_AnnualRevenue (data) - (long)
Sum	CO_CompanyAge (data) - (long)

\_3. For the two new aggregations, select the following values from the dropdown list:

Aggregation	Function	Data item
2	Average	CO_AnnualRvenue (data) – (long)
3	Average	CO_RiskConfidence(data) – (float)

\_4. Use the **Down Arrow** on the Count aggregation to move it to the bottom (make it the last Aggregation).

Function	Data item	
Count	Select a data item	<div>↑ <div>↓</div> 🗑️</div>

Your aggregations setting should look exactly like this:

#### Aggregation

Function	Data item			
Average	CO_AnnualRevenue (data) - (long)	↑	↓	🗑️
Average	CO_RiskConfidence (data) - (float)	↑	↓	🗑️
Count	Select a data item	↑	↓	🗑️

\_5. Click **Group by +** button.

#### Group by +

\_6. Select **CO\_Industry (data) – (keyword)**

CO_Industry (data) - (keyword)	▼
--------------------------------	---

\_7. Click the **Bubble** icon to change the visualization.

## Metric

Table



Bubble

CO_Industry	Count	CO_AnnualRevenue (Average)	CO_RiskConfidence (Average)
Federal	11	10,155,205.818	95.589
Finance	15	14,256,276.333	99.29

### 2.2.7.2 Define Visualization Information

\_1. Click **Visualization** tab

Monitoring	Filters	Visualization
------------	---------	---------------

\_2. For Bubble settings, enter:

Item	Value
X-axis label	Average Company Revenue
Y-axis label	Average Approval Confidence Level

#### Bubble settings

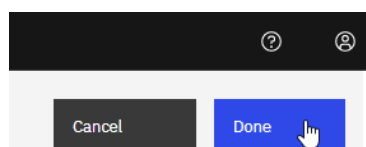
X axis label

Average Company Revenue
-------------------------

Y axis label

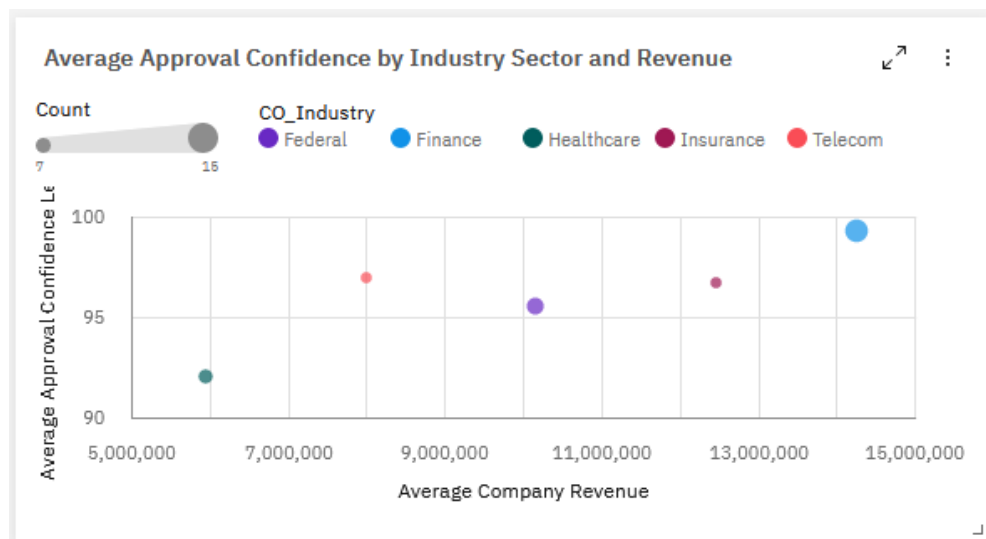
Average Approval Confidence Level
-----------------------------------

\_3. Click **Done**



\_4. On the toolbar about the Dashboard, click the **Save** icon to save your work!

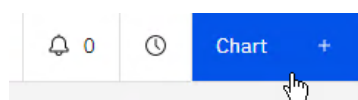
\_5. Your chart should look similar to this.



## 2.2.8 Create "Activity Duration Distribution in Case Completion" Chart

This doughnut chart will show the average time distribution among all activities required to complete a case.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**.

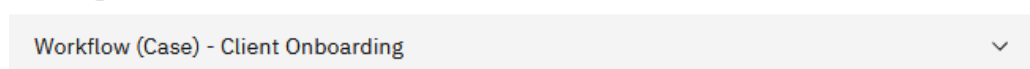
Item	Value
Name	Activity Duration Distribution in Case Completion
Select measurement	Metric

### 2.2.8.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context



Monitoring source





\_2. Change the Aggregation values by setting *Function* to **Average** and *Data item* to **duration-seconds – (long)**

Aggregation 


Function	Data item
Average 	duration-seconds - (long) 

\_3. Click **Group by +** button

Group by 

\_4. Select **task-name – (keyword)**

Group by 

task-name - (keyword) 

\_5. Set visualization type to **Donut**

Metric

Donut



### 2.2.8.2 Define Visualization Information

\_1. Click **Visualization** tab

Monitoring	Filters	Visualization
------------	---------	---------------



\_2. For *Donut settings*, set *Unit* to **Activity**.


Donut settings

Unit

Activity

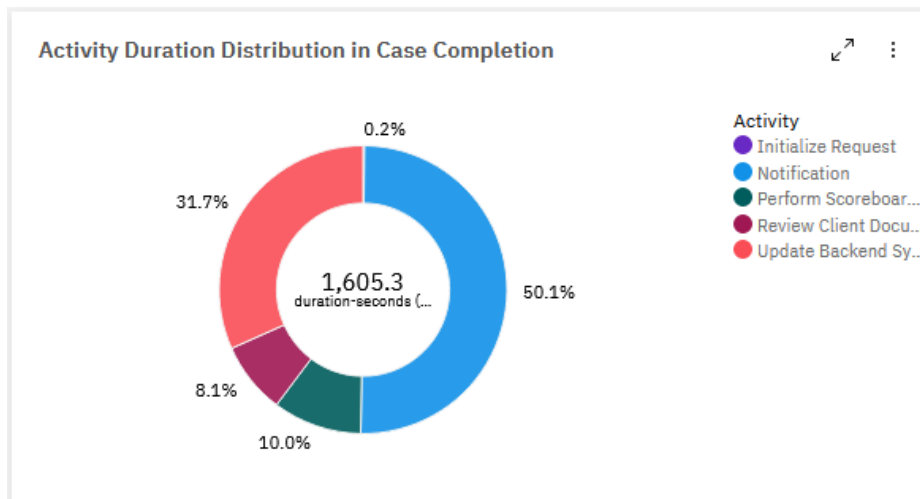
\_3. Click **Done**



Cancel Done 

\_4. Click the **Save** icon on the toolbar above the Dashboard to save your work!

\_5. Your chart should look similar to this.



## 2.2.9 Create "Completed Cases per Day" Chart

This bar chart will show the number of cases completed in a time period.

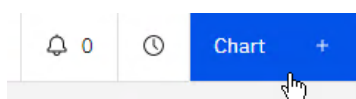
Note that the title states "per Day," but given the data set used for this lab, the scale is "per Minute."

This chart will also include two advanced features:

- **Predictions** – predicts the number of cases completed in the future using one of the below algorithms. This is a very valuable tool to enable capacity human resources planning.
- **Alerts** – provide visual indications when the number of cases completed falls below 2 in a given time period.

Note that depending on the data, KPI Predictions use one of the following algorithms: ARIMA, Seasonal ARIMA, or Exponential Smoothing.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**.

Item	Value
Name	Completed Cases per Day
Select measurement	Period KPI

### 2.2.9.1 Define Monitoring Information

\_1. For *Monitoring source*, select **Workflow (Case) – Client Onboarding**

#### Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

\_2. On *Interval*, change the setting to **Minutes(s)**

#### Interval

Time interval

Custom	Every	1	Minute(s)
--------	-------	---	-----------

\_3. Click **Targets +** button



\_4. For *Label*, enter **Target**, and for *Value*, enter **3**

#### Targets +

Label

Target
--------

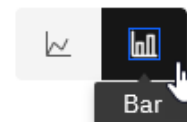
Value

3
---

\_5. For visualization, select **Bar**

## Period KPI

Bar

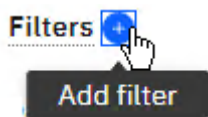


### 2.2.9.2 Define Filters

\_1. Select the **Filters and predictions** tab

Monitoring	Filters and predictions	Visualization	Thresholds
------------	-------------------------	---------------	------------

\_2. Click the **Filter +** button twice to add two filters








\_3. Select the following values for each Filter:

Filter	Data item	Operator	Value
1	type – (keyword)	=	case
2	state – (keyword)	=	Complete

Your Filter setting should look exactly like this:

Filters 

Data item	Operator	Value
type - (keyword) 	= 	case
		
Data item	Operator	Value
state - (keyword) 	= 	Complete

\_4. Under **Prediction**, enable the slider to turn them on.

**Prediction**

 Prediction on

### 2.2.9.3 Define Visualization Information

\_1. Click the **Visualization** tab

Monitoring	Filters	<b>Visualization</b>
------------	---------	----------------------

\_2. For Trend settings, enter:

Item	Value
X-axis label	Date
Y-axis label	Completed Cases

**Trend settings**

X axis label

Date
------

Y axis label

Completed Cases
-----------------

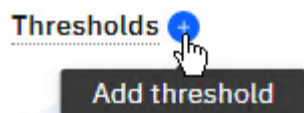
### 2.2.9.4 Define Thresholds

This setting allows you to customize the Gage threshold setting.

\_1. Select **Thresholds** tab.

Monitoring	Filters	Visualization	<b>Thresholds</b>
------------	---------	---------------	-------------------

\_2. Click the **Thresholds +** button **twice** to add two thresholds.



\_3. For each group select the following values from the dropdown list:

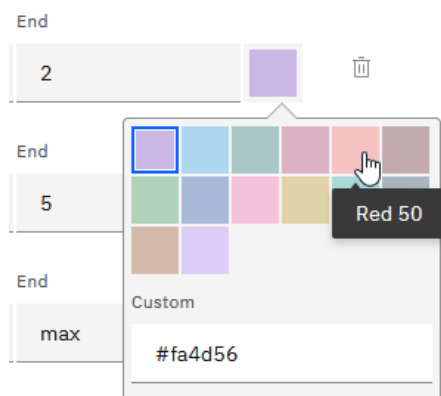
Threshold	Data item	Value
1	Threshold name	Case Completion Rate
	Value	2
	Range name 1	Low
	Range name 2	Normal
2	Threshold name	T2
	Value	5
	Range name	High

Your Thresholds setting should look exactly like this:

#### Thresholds +

Threshold name	Value	Range name	Start	End
Case Completion Rate	2	Low	min	2
		Range name	Start	End
		Normal	2	5
Threshold name	Value	Range name	Start	End
T2	5	High	5	max

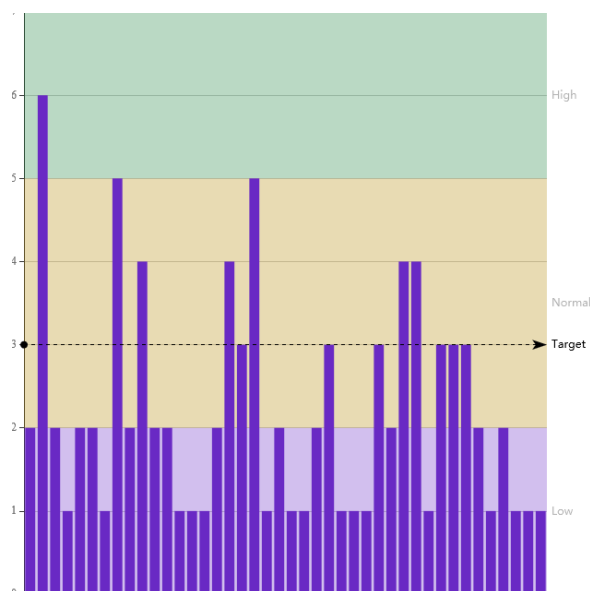
\_4. Click the **Color patch** next to **Low**, then select the **Red color patch** from the palette.



\_5. Using the above steps, customize the other two colors.

Item	Value
Normal	Yellow
High	Green

\_6. The color settings should look exactly like this:



#### 2.2.9.5 Define Alert

This setting allows you to customize the Gage threshold setting.

\_1. Click Alerts +



\_2. Make sure the threshold **Case Completion Rate** is selected.




Case Completion Rate ▼


\_3. Configure the Alert using the input values shown below:

Item	Value
Alert if the value	drops to or below the threshold
Message	The case completion rate is low.


Alerts 

Case Completion Rate 


Alert if the value

drops to or below the threshold 

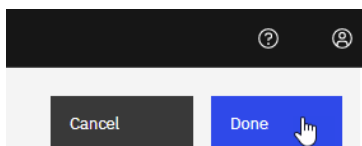
Message


Case completion rate is low. 

Priority

High 

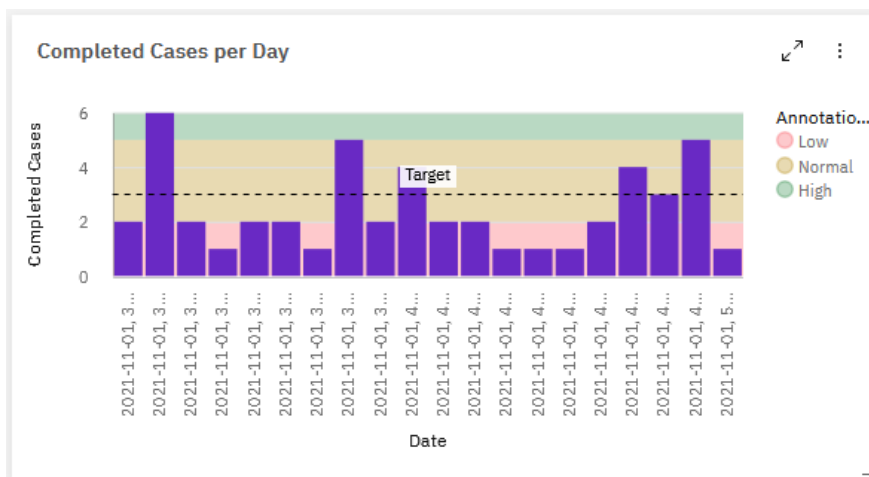
\_4. Click **Done**



 Note some alerts may appear temporarily on the right side of the Dashboard. This is expected.

\_5. Click the **Save** icon on the toolbar above the Dashboard to save your work!

\_6. Your chart should look similar to this.

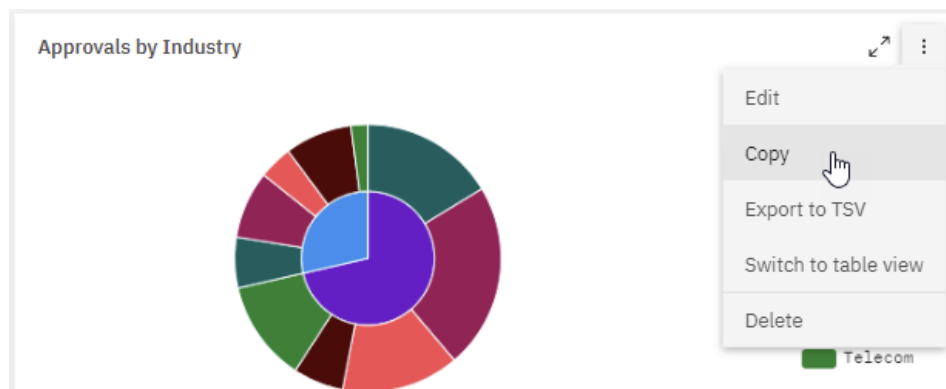


## 2.2.10 Create "Approvals by Industry Heatmap" Chart

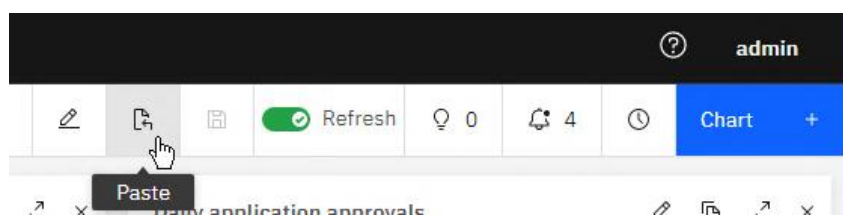
This heatmap chart will use the tile color intensity to indicate the count (the more saturated the color, the higher the count). The tiles will be positioned in a grid. The X-Axis will represent the approvals state: approved/rejected/approval pending. The Y-Axis will reflect the industry.

Since this chart is almost identical to the *Approval by Industry* chart, we will use the copy-and-paste technique to create this chart from the *Approvals by Industry* chart.

\_1. On the *Approvals by Industry* chart, click the **ellipses** and select **Copy**.



\_2. On the toolbar above the Dashboard, click **Paste**.



\_3. On the *copy of Approval by Industry* chart, click the **ellipses** and select **Edit**.

\_4. Next to the chart name, click **Edit configuration**.



\_5. For *Name*, enter **Approvals by Industry Heatmap** and then click **Apply**.

The screenshot shows the "Edit chart" configuration dialog. The "Name" field contains "Approvals by Industry Heatmap" and has a green checkmark. The "Description (optional)" field is empty. Under "Select measurement", the "Metric" option is selected, showing a "90%" gauge. At the bottom, the "Apply" button is highlighted with a mouse cursor.

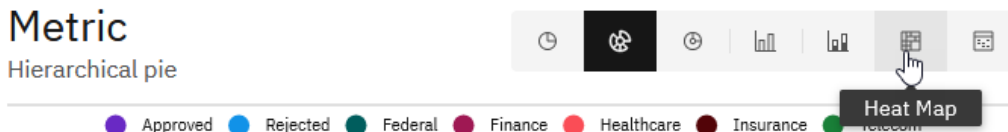


### 2.2.10.1 Define Monitoring Information

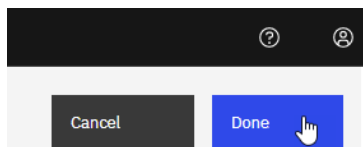
\_1. For visualization, select **Heat Map**

#### Metric

Hierarchical pie

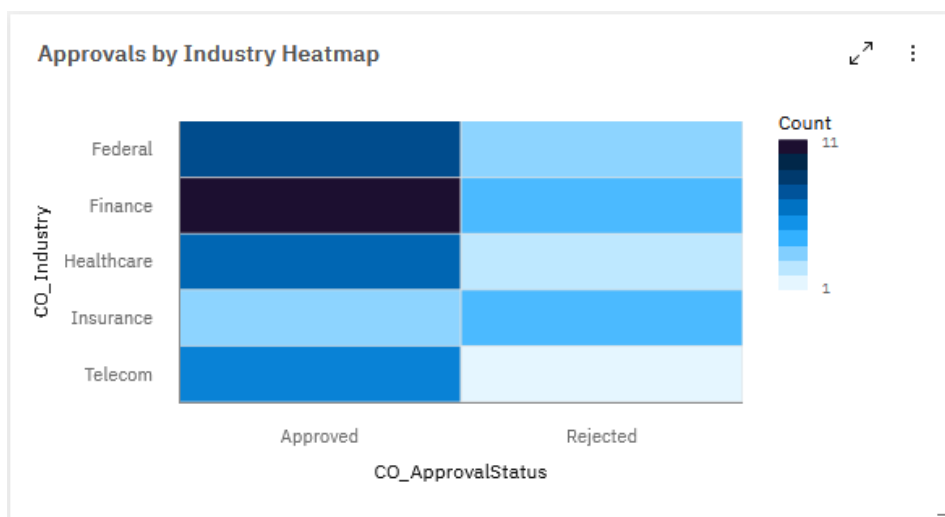


\_2. Click **Done**



\_3. Click the **Save** icon on the toolbar above the Dashboard to save your work!

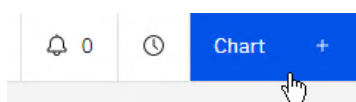
\_4. Your chart should look similar to this.



### 2.2.11 Create "Client Onboarding Data" Chart

You will be creating a Client Onboarding data chart. The data chart will contain columns representing selected Client Onboarding case properties.

\_1. Click **Chart +**



\_2. Enter the following and then click **Create**:

Item	Value
Name	Client Onboarding Data
Select measurement	Data

### 2.2.11.1 Define Monitoring Information

\_1. For *Monitoring source*, select Workflow (Case) – Client Onboarding

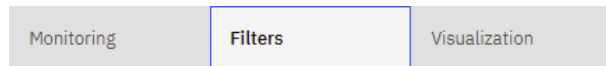
## Monitoring context

Monitoring source

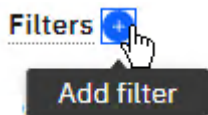
Workflow (Case) - Client Onboarding

### 2.2.11.2 Define Filters

\_1. Select **Filters** tab



\_2. Click the **Filter +** button **three** times to add three filters.



\_3. For each group, select the following values from the dropdown list:

Group	Data item	Operator	Value
1	category – (keyword)	=	icm
2	type – (keyword)	=	case
3	state – (keyword)	=	Complete

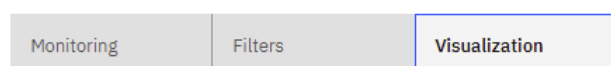
Your Filters setting should look exactly like this:

Filters +

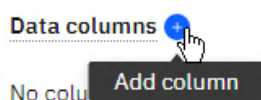
Data item	Operator	Value
category - (keyword) ▼	= ▼	icm
AND		
Data item	Operator	Value
type - (keyword) ▼	= ▼	case
AND		
Data item	Operator	Value
state - (keyword) ▼	= ▼	Complete

### 2.2.11.3 Define Visualization

\_1. Select **Visualization** tab.



\_2. Click the **Data columns +** button **five** times to add five data columns.























\_3. For each group, select the following values from the dropdown list:

Data column	Data item	Label
1	CO_ServiceFee (data)	Service Fee
2	CO_Industry (data))	Industry
3	CO_AddressCountry (data)	Country
4	CO_ApprovalStatus (data)	Approved?
5	duration-seconds	Duration

Your *Data columns* setting should look exactly like this:


#### Data columns

Data item	Label	
CO_ServicesFee (data) 	Service Fee	  
CO_Industry (data) 	Industry	  
CO_AddressCountry (data) 	Country	  
CO_ApprovalStatus (data) 	Approved?	  
duration-seconds 	Duration	  

\_4. Click the **Service Fee** column to sort the data by the Service Fee column.

## Data

5 columns, 49 rows

Service Fee 	Industry	Country	Approved?	Duration
---	----------	---------	-----------	----------

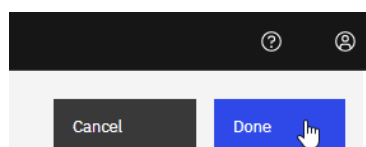
\_5. The data in the Data Chart should look similar to this.

## Data

5 columns, 49 rows

Service Fee 	Industry	Country	Approved?	Duration
70,000	Insurance	Canada	Rejected	686
64,600	Insurance	Australia	Rejected	878
64,600	Insurance	Australia	Rejected	619
60,000	Healthcare	South Africa	Approved	81
53,200	Insurance	Germany	Rejected	94

\_6. Click **Done**



\_7. Click the **Save** icon on the toolbar above the Dashboard to save your work!

\_8. The chart should look similar to this.

Service Fee	Industry	Country	Approved?	Duration
18,000	Federal	Canada	Rejected	908
23,750	Finance	Canada	Approved	796
15,000	Healthcare	USA	Approved	701
18,000	Finance	Germany	Rejected	572
25,000	Finance	USA	Approved	533

Note:

- You can sort the data in the chart. For example, in the screenshot above, the chart is sorted by the Service Fee column.
- You can export the data in the chart as a spreadsheet in the TSV format.

Service Fee	Industry	Country	Approved?	Duration
70,000	Insurance	Canada	Rejected	619
64,600	Insurance	Australia	Rejected	
64,600	Insurance	Australia	Rejected	
60,000	Healthcare	South Africa	Approved	81
53,200	Insurance	Germany	Rejected	94

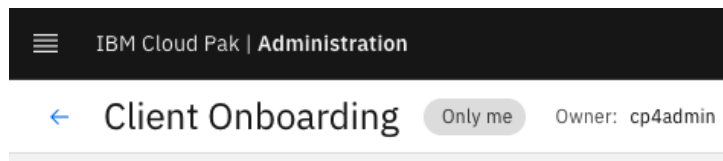
A context menu is open over the 'Service Fee' column header, showing options: Edit, Copy, Export to TSV, and Delete. A mouse cursor is pointing at 'Export to TSV'. A small blue square with the number '1' is on the 'Service Fee' header, and a small black circle with the number '2' is on the 'Export to TSV' menu item.

## 2.2.12 Create a Configure Goal

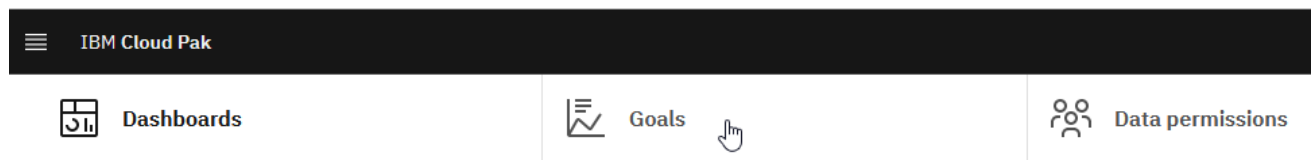
A Goal is a business statement that brings purpose and scope to your dashboards. Goals are used to aggregate charts within a dashboard and to give dashboards a business purpose. A goal's definition includes the details of a specific objective you want to achieve, the time frame for achieving an objective, and identifiers (categories and colors) for the goal.

### 2.2.12.1 Create a Goal

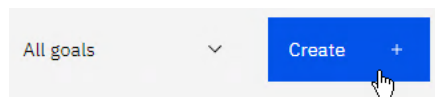
\_1. Click the **arrow** to the left of the Client Onboarding dashboard



\_2. Click **Goals**



\_3. Click **Create**



\_4. For *Name*, enter **Focus Corp's top Client Onboarding KPI**

\_5. For *Description*, enter **Focus on the three top KPIs identified by the senior management team.**

\_6. For *Priority*, select **High**

\_7. Click *Goal color* to **Red**

\_8. Your Goal definition should look exactly like this:

#### Details

Name

Focus Corp's top Client Onboarding KPI ✓

Description (optional)

Focus on the three top KPI identified by senior management team. ✓

Goal color

Red ✓

#### Goal specification

Goal classification (optional)

Enter category

Priority

☐ Low ☐ Medium ☒ High ✓

Start date

☒ Now ☐ Custom

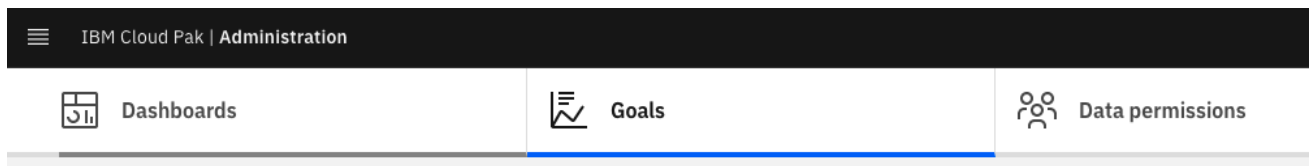
10/25/2021

\_9. Click **Save**

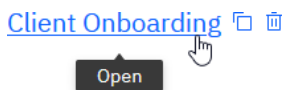


### 2.2.12.2 Set a business goal for selected charts

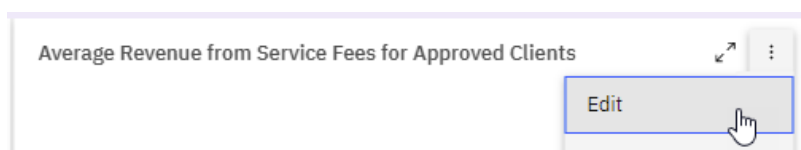
\_1. Click **Dashboards**.



\_2. Click **Client Onboarding** dashboard.

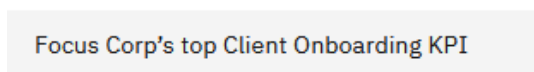


\_3. On the Average Revenue from Service Fees for Approved Clients chart, click the **ellipses** and select **Edit**

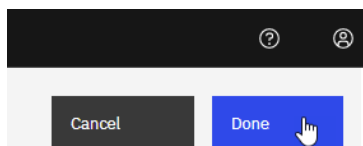


\_4. For Business goal, from the dropdown list, select **Focus Corp's top Client Onboarding KPI**

Business goal

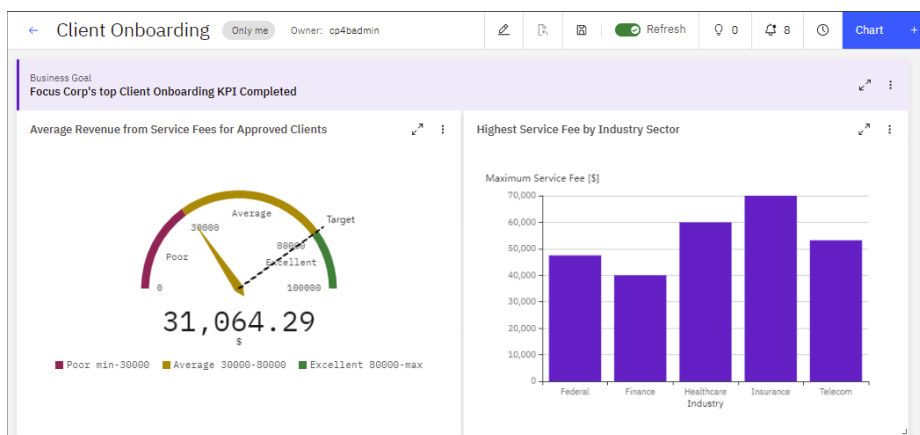


\_5. Click **Done**



\_6. Repeat the above steps to add a Business Goal to **Highest Service Fee by Industry Sector**

\_7. The top of your Dashboard should now look similar to this:

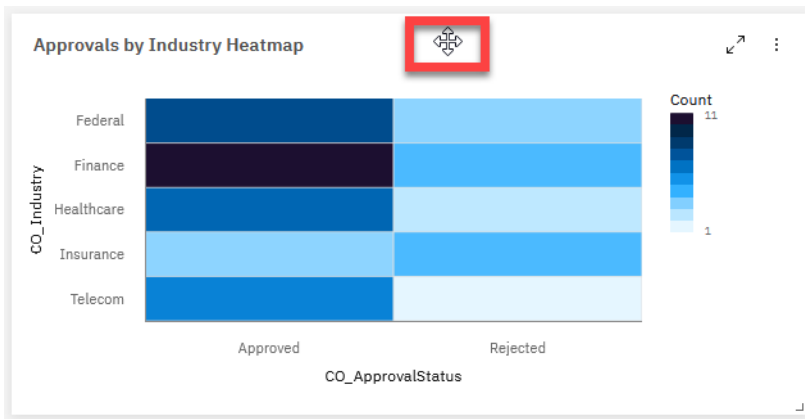


### 2.2.13 Change Dashboard Layout

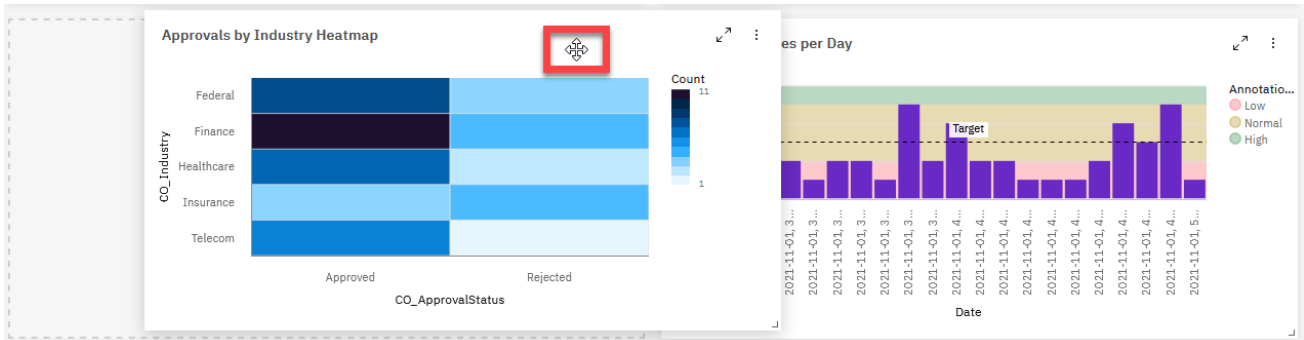
You will now customize your Dashboard by moving and changing chart sizes.

### 2.2.13.1 Move Approvals by Industry Heatmap Chart

\_1. Click and hold the **title area** on the *Approvals by Industry Heatmap* chart:

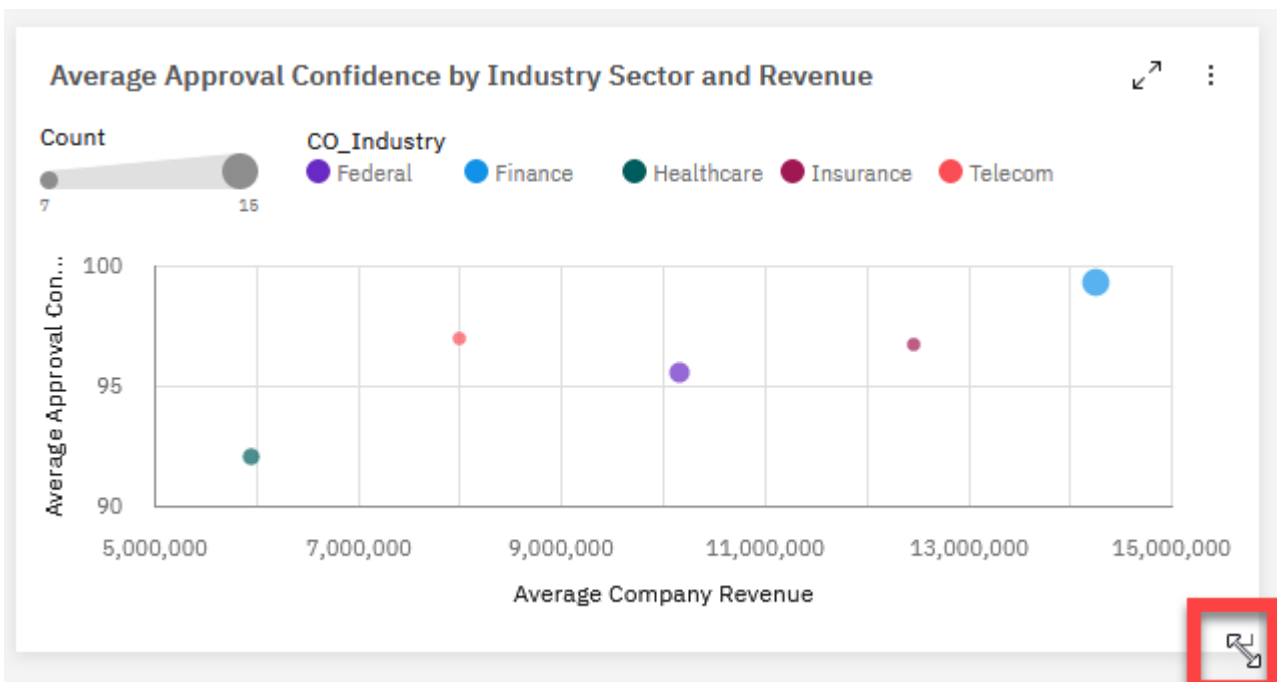


\_2. **Drag** the chart to the empty area left of the Completed Cases per Day chart and release.

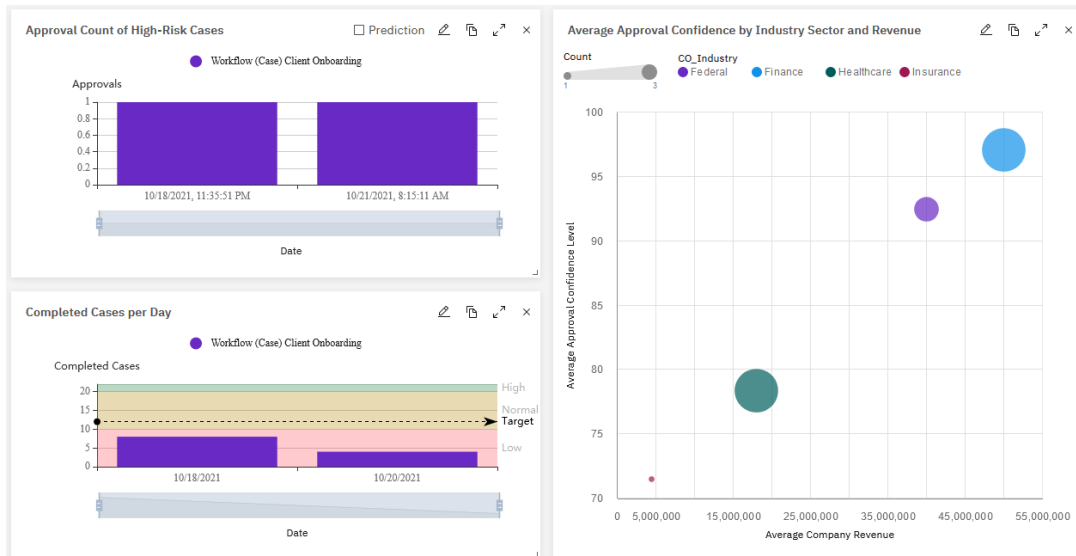


### 2.2.13.2 Expand chart Average Approval Confidence by Industry Sector and Revenue

\_1. Click and hold the image expander in the bottom right corner of the **Average Approval Confidence by Industry Sector and Revenue** chart

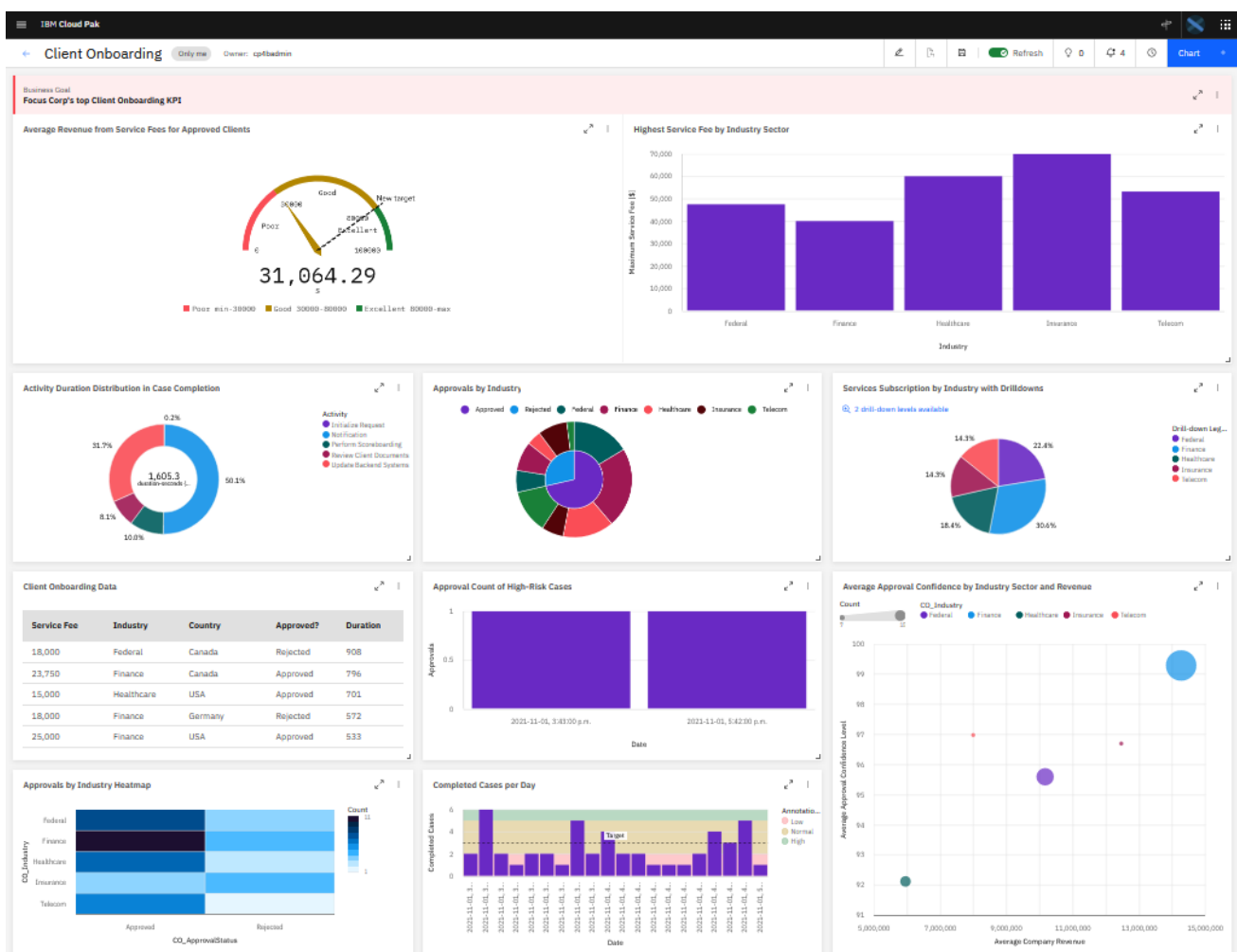


\_2. Stretch the chart downwards until it achieves the height of two charts.



\_3. Click the **Save** icon on the toolbar above the Dashboard to save your work!

\_4. Your final version of the Client Onboarding Dashboard should now look similar to this:

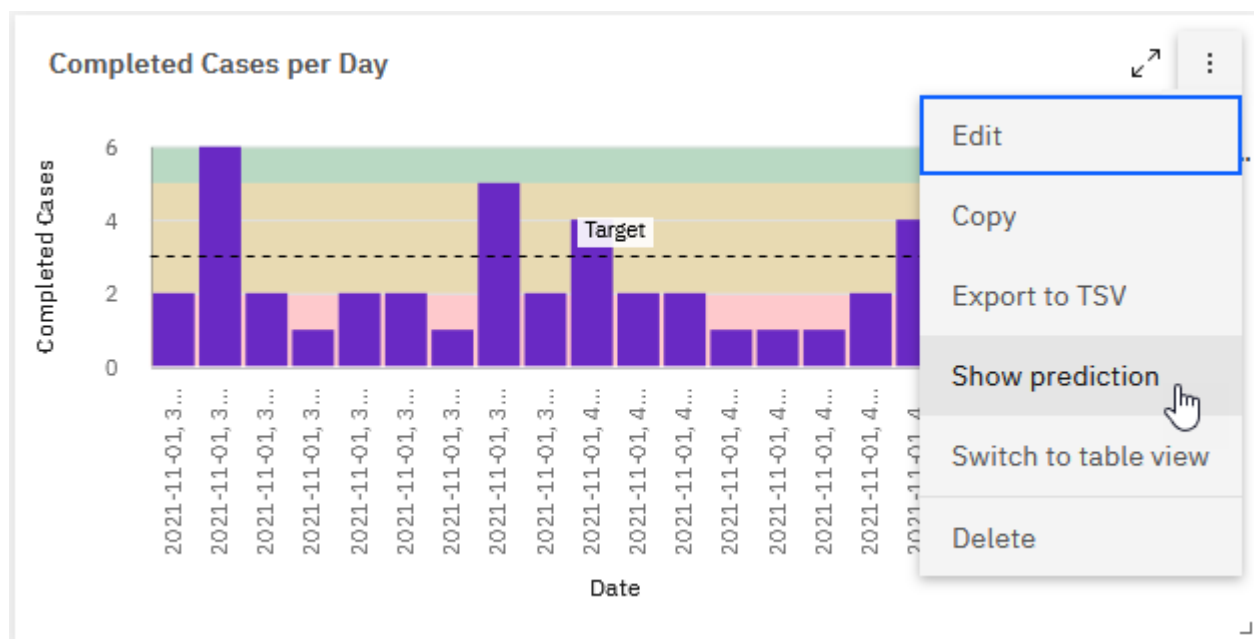




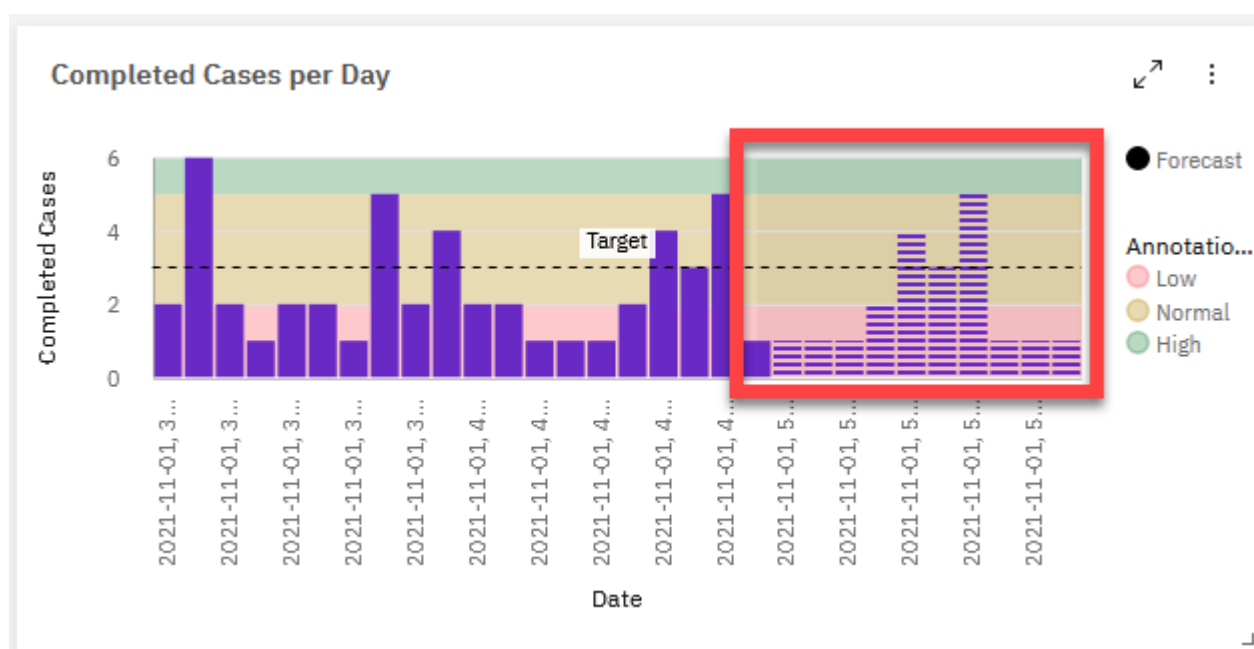
## 2.2.14 Explore Advanced Dashboard Features

### 2.2.14.1 KPI Predictions

\_1. Click the ellipses on the Completed Cases per Day chart and then select **Show prediction**.

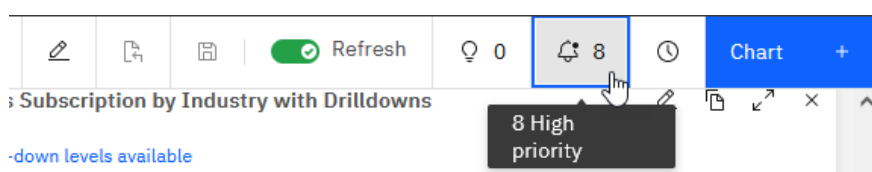


\_2. You should now see the predicted case completion rate information.

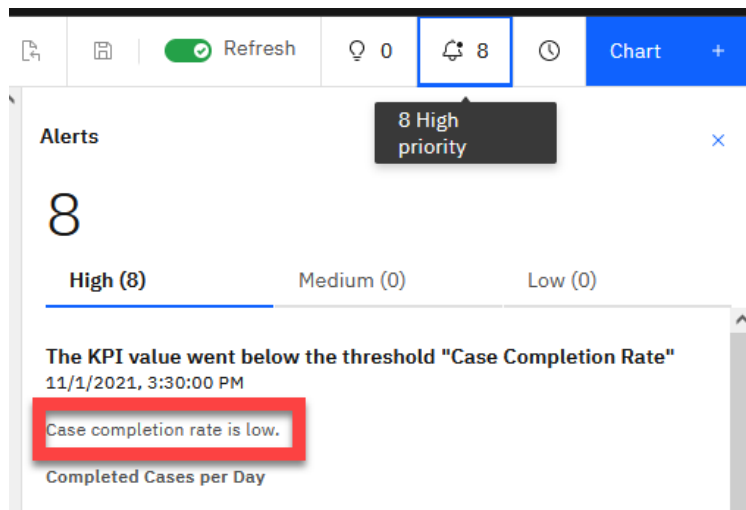


### 2.2.14.2 Dashboard Alerts

\_1. Click the **Alert** icon in the toolbar above the Dashboard.



\_2. You should now see all the alerts generated whenever the Case Completion Rate just reached or went below the lower threshold (2) you defined in the Completed Cases per Day Chart.



You may see a different number of alerts generated when other users work on the Client Onboarding case.

## 2.3 Summary

In this lab, you learned how to use the Business Performance Center to build a dashboard and provide insights into a Client Onboarding solution for a line of business users. Specifically, you learned how to create and configure the following BPC artifacts: Dashboards, Charts, Chart Alerts, and Goals.

## Appendix A. IBM Business Automation Insights Architecture

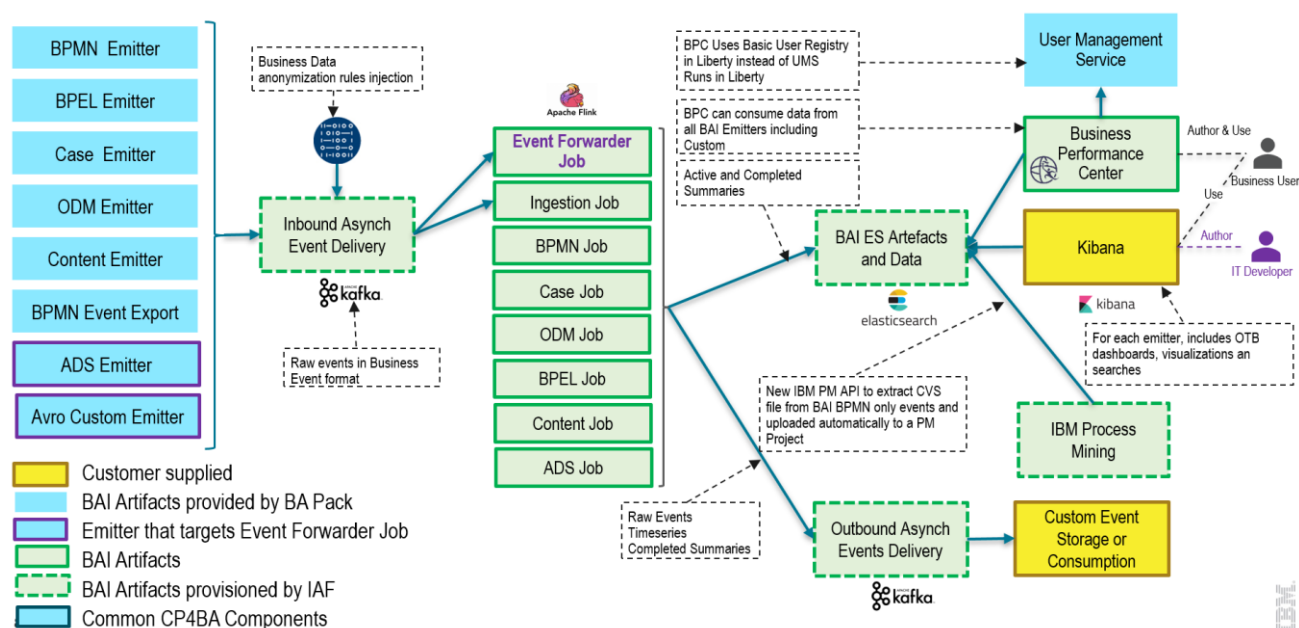


Figure 2. IBM Business Automation Insights Architecture – Full Detail

Additional presentation materials for IBMers and Business Partners:

- More technical information about BAI: <https://ibm.box.com/v/IBM-BAI-Tech-Intro>
- More technical details about BPC: <https://ibm.box.com/v/BusinessPerformanceCenter>

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