

IBM Cloud Pak for Business Automation

Demos and Labs - Fall 2021

Operational Intelligence

IBM Business Automation Insights

Build Business Performance Center Dashboard

V 1.6

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1 Lab Introduction

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

This lab will consist of one Exercise:

1. Create Mortgage Solution Dashboard

1.1 Introduction to IBM Business Automation Insights

IBM Business Automation Insights enables capture of events generated by the operational systems that are implemented with the IBM Business Automation products. Captured events are aggregated into business relevant KPIs, and presented them in dashboards for lines of business to have a real-time view on their business operations.

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

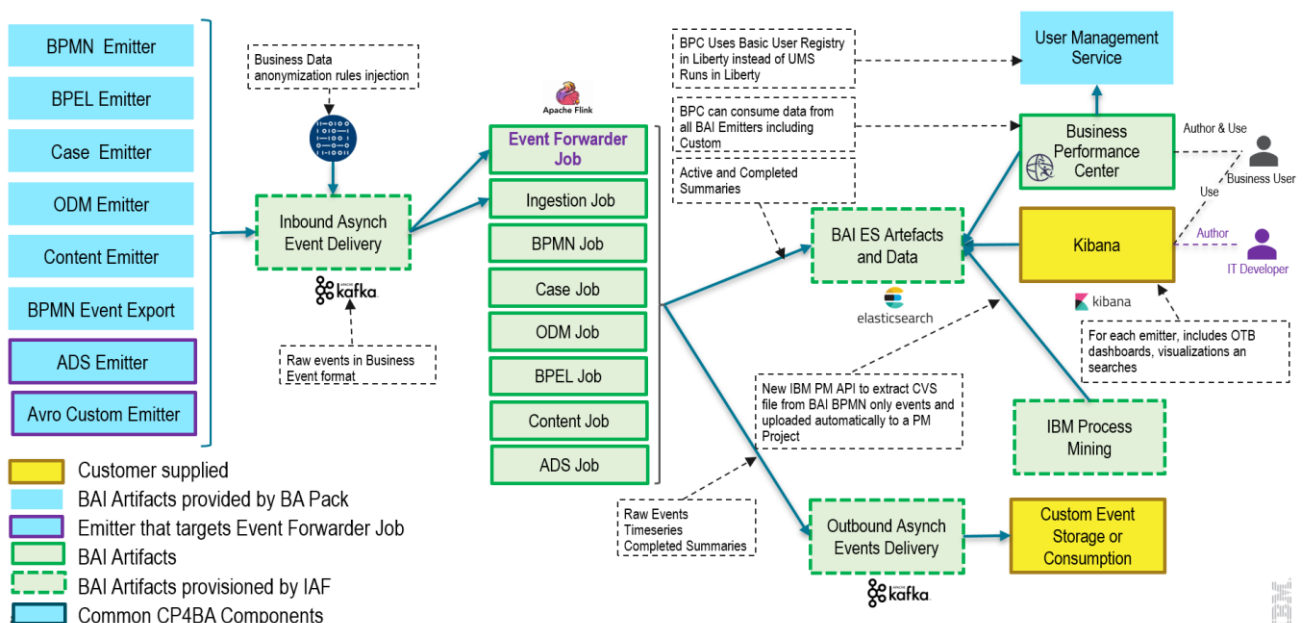


Figure 1. IBM Business Automation Insights 20.0.1 Architecture

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 important business activities and processes.
- prepare, track, and design visualizations of *metrics, key performance indicators (KPIs)*, and other measurements of business performance in customizable dashboards.

More information about BPC: <https://ibm.box.com/v/BusinessPerformanceCenter>

1.2 Lab Overview

The solution used during the labs is *Client Onboarding Workflow* automation which is implemented as a Case with several BPMN Process that implement Case Activities. The automation contains a single Case Type

Client Onboarding Requests which contains activities which need to be performed, data, documents and conditions driving the processing.

[Automations](#) / [Client Onboarding](#) / Case Type

Client Onboarding Request

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

All activities ⓘ 🔒 View

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>

All five Case Activities above are implemented by BPMN Processes (shown blow) in automatically generated Process App (Client Onboarding)

IBM Automation

Business automations /

Client Onboarding

Process App Settings (Read-only)

Client Onboarding

Processes

User interface

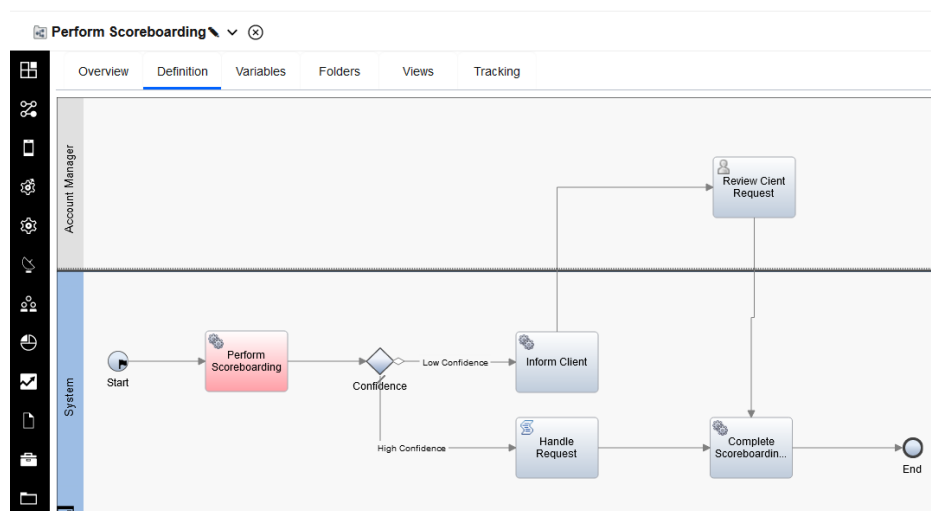
Exposed Automation Services

Type Processes 6

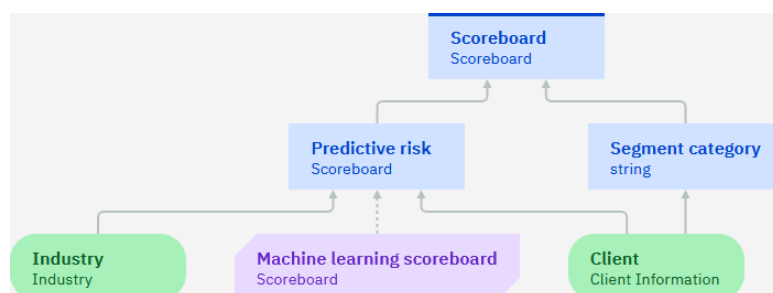
Process

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

The *Perform Scoreboarding* Activity (shown in light red below) is of particularly interest. It uses Automation Services to invoke Scoreboard decision implemented using Automation Decision Services.



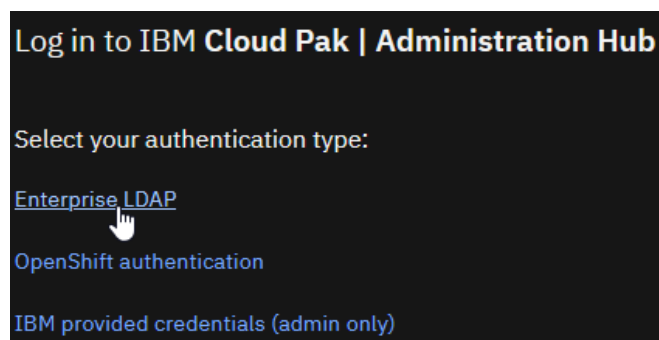
The Scoreboard ADS Decision determines if a client is risky using a ML-based predictive model and classifies the client into a segment.



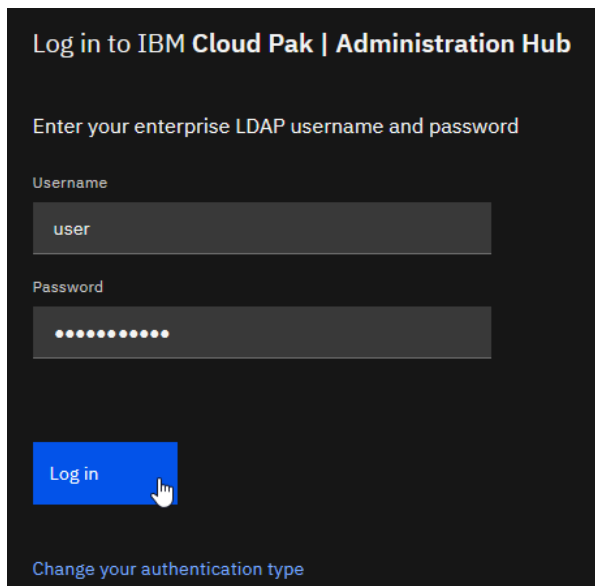
When authoring one of the Charts you will be using data generated by the above decision.

1.3 Lab Setup Instructions

- _1. If you are performing this lab as a part of an IBM event, access the document that lists the available systems and URLs along with login instructions. For this lab, you will need to access **IBM Business Performance Center**.
- _2. Paste the Business Performance Center URL to your web browser.
- _3. Select **Enterprise LDAP** login option



_4. Enter the supplied to you *Username* and *Password* and then click **Log in**



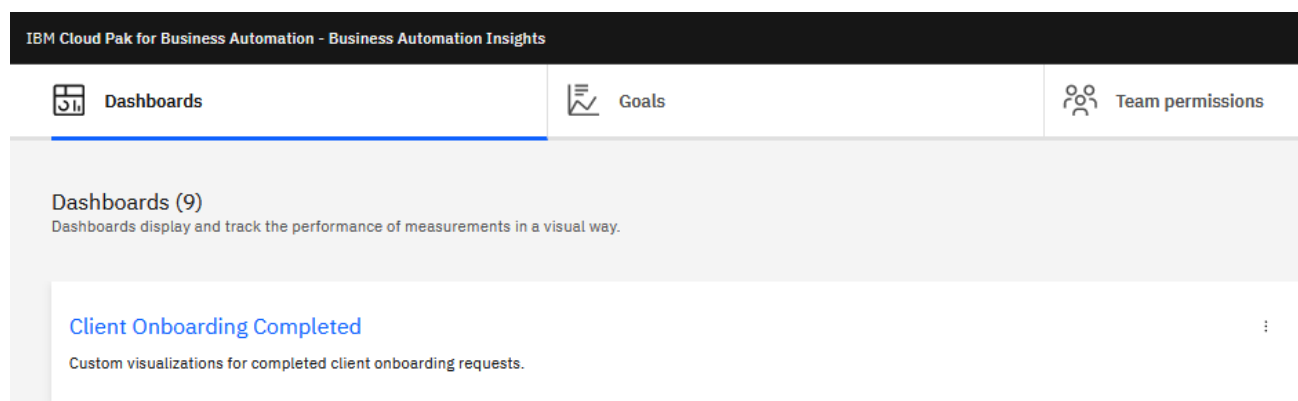
The screenshot shows a login interface for the IBM Cloud Pak Administration Hub. At the top, the title "Log in to IBM Cloud Pak | Administration Hub" is displayed. Below the title, a prompt reads "Enter your enterprise LDAP username and password". There are two input fields: the first is labeled "Username" and contains the text "user"; the second is labeled "Password" and contains ten dots, indicating a masked password. Below the password field is a blue "Log in" button with a white hand cursor icon pointing at it. At the bottom left, there is a link that says "Change your authentication type".

2 Exercise: Create Client Onboarding Workflow Dashboard

2.1 Introduction

In this lab exercise you will use BPC to create a business dashboard that will enable a business user to get a real time business insight into *Client Onboarding Workflow*.

In addition to built-in dashboards, a reference version of the dashboard you will be building in the lab exercise (called **Client Onboarding Completed**) has already been built for you.



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

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 are authoring your dashboard. Consequently some of the screen shots in the lab instructions may not look exactly as captured in the lab instructions.

2.2 Exercise Instructions

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

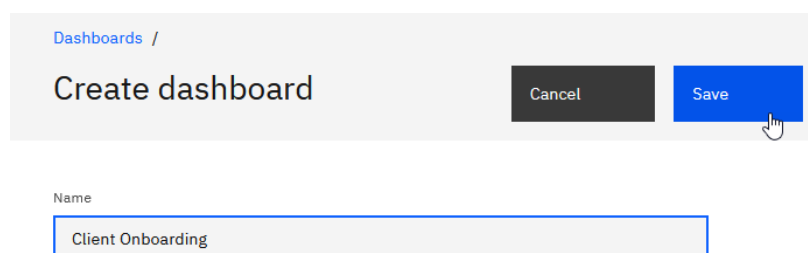
- Client Onboarding **Dashboard**
- **Charts** used in the Client Onboarding dashboard
- A Chart **Alert**
- A **Goal** to group related Charts

2.2.1 Create a Dashboard

_1. Click Create +



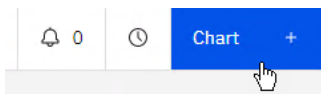
_2. For *Name* enter **Client Onboarding** and click **Save**



2.2.2 Create “Average Revenue from Service Fees for Approved Clients” Chart

This gauge chart will be showing the average revenue from service fees for clients that were approved.

_1. Click **Chart +**



_2. 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 Client Onboarding Workflow.

_2. In *Aggregation*, for *Function* select **Average** and for *Data item* select **CO_ServicesFee (data) – (long)**

Aggregation

Function

Average

Data item

CO_ServicesFee (data) - (long)

If you are wondering how this Case Property got into BAI, take a look at these comments...

CO in CO_ServciesFee is Client Onboarding Solution prefix.

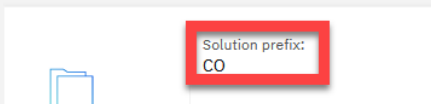
Client Onboarding

Overview

Properties

Roles

In-baskets



ServicesFee in CO_ServciesFee is the name of the of the Client Onboarding Case properties

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 BAI Case Emitter to add this property to the emitted events we need to configure Client Onboarding Audit Configuration

A screenshot of the IBM Business Automation Workflow Case administration console. The page title is 'Manage Audit Configuration'. 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.

| Object Type | Object Name | Property Name | Property Symbolic Name |
|-------------|---------------------------|--------------------|------------------------|
| Case | Client Onboarding Request | Services Fee | CO_ServicesFee |
| Case | Client Onboarding Request | Services Requested | CO_ServicesRequested |

_3. Click **Add target +**



_4. For *Value* enter **80000**

Targets 

| Label | Value | |
|------------|--------|---|
| New target | 80,000 |  |

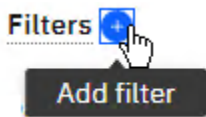
2.2.2.2 Define Filter Data

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

_1. Select **Filters** tab



_2. Click **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 **Visualization** tab



_2. Enter the following values:

| Item | Value |
|------|-------|
| Min | 0 |
| 10 | 10000 |
| Unit | \$ |

Your Gauge setting should look exactly like this:

Gauge settings

| | |
|---------------------------------|--------------------------------------|
| Min | Max |
| <input type="text" value="0"/> | <input type="text" value="100,000"/> |
| Unit | |
| <input type="text" value="\$"/> | |

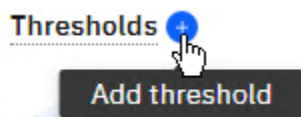
2.2.2.4 Define Thresholds

This setting allows you to customize Gage threshold setting.

_1. Select **Threshold** tab

| | | | |
|--|--|--|---|
| <input checked="" type="radio"/> Monitoring Select data | <input checked="" type="radio"/> Filters Refine selection | <input checked="" type="radio"/> Visualization Display data | <input checked="" type="radio"/> Thresholds Label ranges |
|--|--|--|---|

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






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

| Threshold | 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 |  |
| | | | | | |
| | | Range name | Start | End | |
| | | Average | 30,000 | 80,000 |  |
| | | | | | |
| Threshold name | Value | Range name | Start | End | |
| Above | 80,000 | Excellent | 80,000 | max |  |


_4. Click **Purple Color patch** and then select **Red color patch** from the palette


Start

End

min

30,000



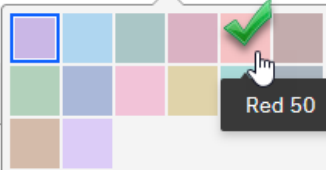


Start

End

30,000

80,000



Red 50

Start

End

80,000

max

Custom

#6929c4

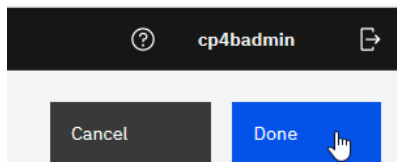
_5. Using the above steps customize the other two colors

| Item | Value |
|-----------------|--------|
| Orange | Yellow |
| Excellent Color | Green |

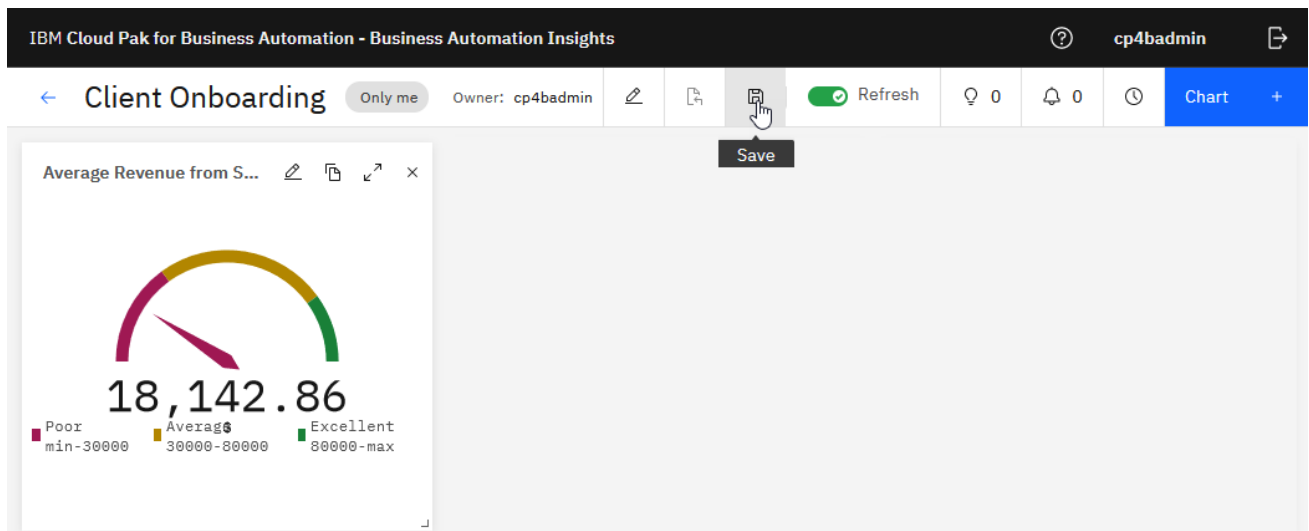
The color settings should look exactly like this:




_6. Click **Done**



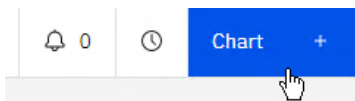
_7. On the Dashboard Toolbar click **Save** icon to save you work!



2.2.3 Create “Approvals by Industry” Chart

This hierarchical pie chart will be showing the state of approvals (Approved, Rejected Under Review) by industry.

_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

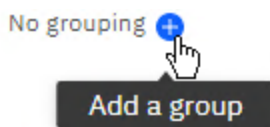
_1. For *Monitoring source* select Workflow (Case) – Client Onboarding

Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

_2. Click **Add a group +** button **twice**



_3. Enter the following keywords for the *Group by* entries:

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

Group by +

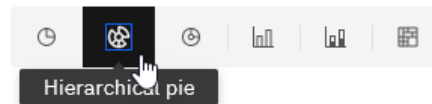
CO_ApprovalStatus (data) - (keyword)

CO_Industry (data) - (keyword)

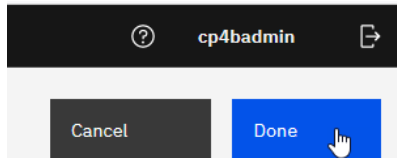
_4. For chart type select **Hierarchical pie**

Metric

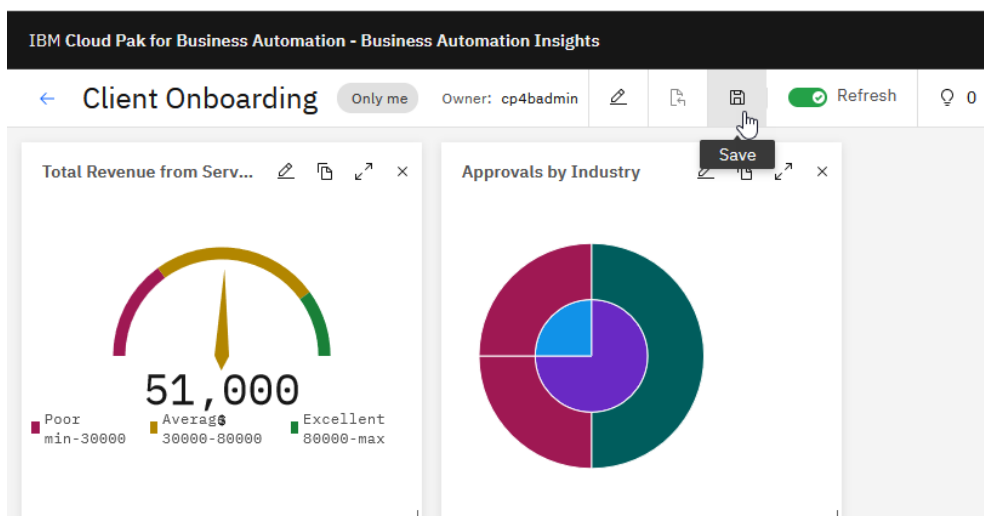
Hierarchical pie



_5. Click **Done**



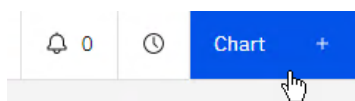
_6. On the Dashboard Toolbar click **Save** icon to save you work!



2.2.4 Create “Services Subscription by Industry with Drilldowns” Chart

This pie chart will be showing the service subscriptions by industry. Additional feature of this chart is ability to drill 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

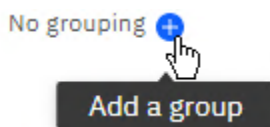
_1. For *Monitoring source* select **Workflow (Case) – Client Onboarding**

Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

_2. Click **Add a group +** button **three times**




_3. Enter the following keywords for the *Group by* entries:

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


Drill down groups should look exactly like his:


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:

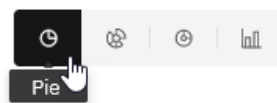
CO_ServicesRequested (data) - (keyword) 

CO_AddressCountry (data) - (keyword) 

_4. For chart type select **Pie**

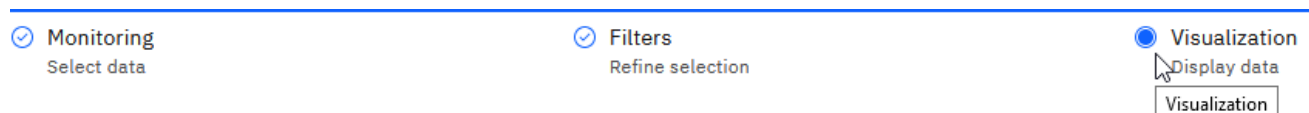
Metric

Pie



2.2.4.2 Define Visualization Information

_1. Click **Visualization** tab



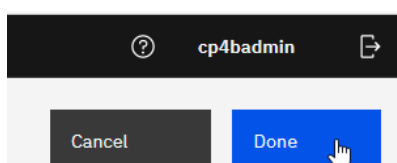
_2. For *Pie settings* > *unit* enter **Drill-down Legend**

Pie settings

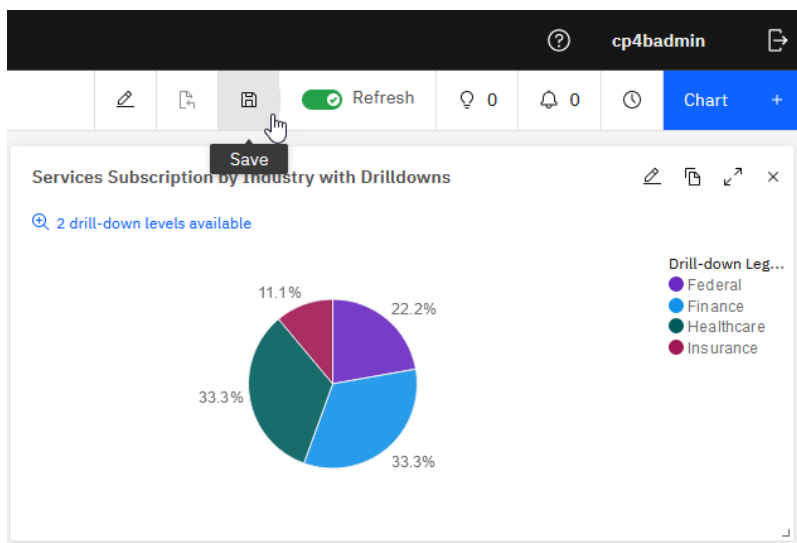
Unit

Drill-down Legend

_3. Click **Done**

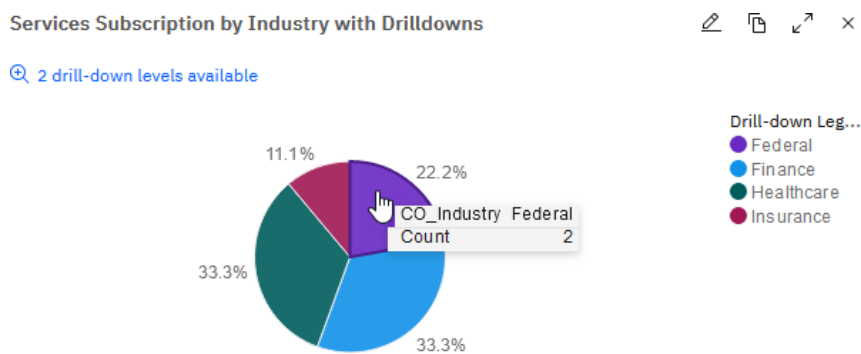


_4. On the Dashboard Toolbar click **Save** icon to save you work!

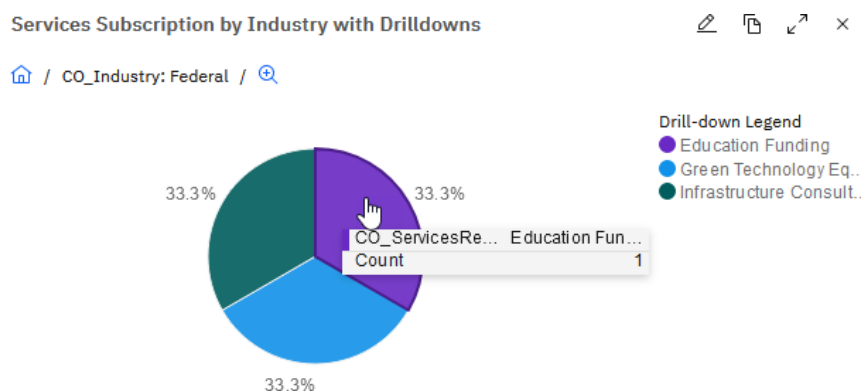


2.2.4.3 Explore Drill-down capability

_1. Select first drill-down level by clicking on **Federal** Industry

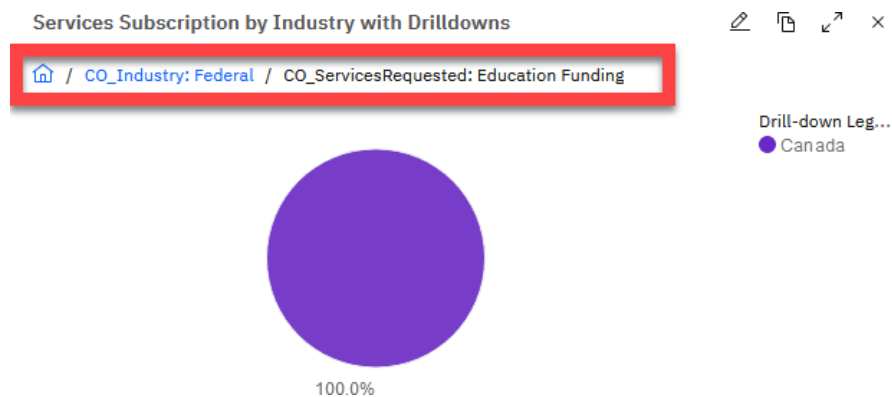


_2. Select second drill-down level by clicking on **Education Funding** Service



_3. You should now see all the countries for *Federal > Education Funding* grouping.

Note the breadcrumbs....



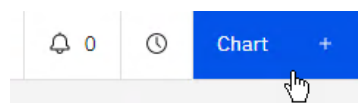
_4. Click **Reset** to get back to original view



2.2.5 Create “Highest Service Fee by Industry Sector” Chart

This bar chart will be showing highest service fee by industry sector.

_1. Click **Chart +**



_2. In *Client Onboarding- Create chart* window, 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

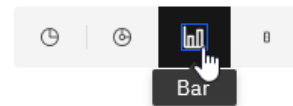
Data item

CO_ServicesFee (data) - (long)

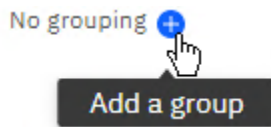
_3. For chart type select **Bar**

Metric

Bar



_4. Click **Add a group +** button



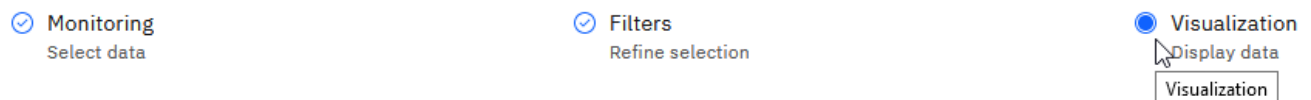
_5. Enter **CO_Industry (data) – (keyword)**

Group by +

CO_Industry (data) - (keyword) ▼

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

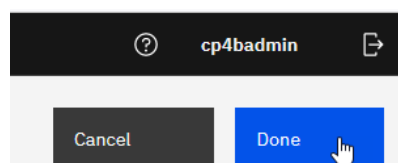
X axis label

Industry

Y axis label

Maximum Service Fee [\$]

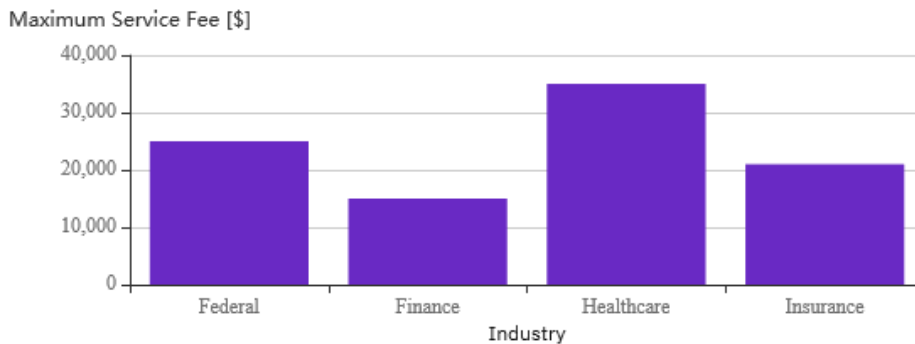
_3. Click **Done**



_4. On the Dashboard Toolbar click **Save** icon to save you work!

Your chart should look similar to this

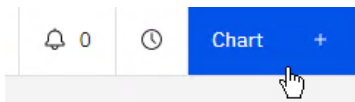
Highest Service Fee by Industry Sector



2.2.6 Create “Approval Count of High-Risk Cases” Chart

This bar chart will be showing the approval counts for high-risk cases in a given time period. High-risk cases are identified by the decision service (which uses ML service to score risk level) and serves as a suggestion for approvers. This may be an important metric as it indicates that the ML model decision was overridden by the approved and there the ML model may have not been accurate and may need re-training.

_1. Click **Chart +**



_2. In *Client Onboarding*- *Create chart* window, 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

Workflow (Case) - Client Onboarding

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

Interval

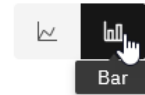
Time interval

Custom Every 1 Minute(s)

_3. For chart type select **Bar**

Period metric

Bar

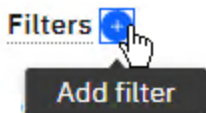


2.2.6.2 Define Filters and Predictions

_1. Select Filters and predictions tab

Monitoring Filters and predictions

_2. Click **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

Monitoring Filters Visualization

Select data Refine selection Display data Visualization

_2. For Bar settings enter:

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

Trend settings

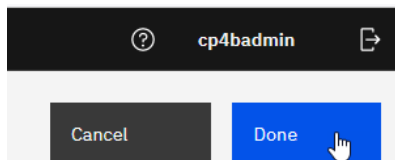
X axis label

Date

Y axis label

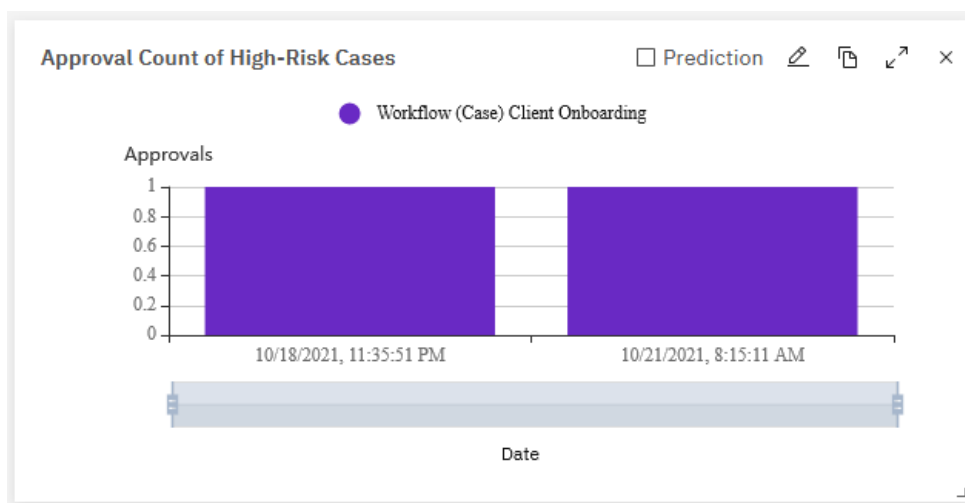
Approvals

_3. Click **Done**



_4. On the Dashboard Toolbar click **Save** icon to save you work!

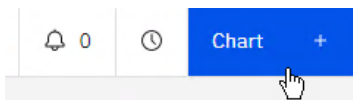
You chart shgoyuld look similar to this



2.2.7 Create “Average Approval Confidence by Industry Sector and Revenue” Chart

You will be creating Average Approval Confidence by Industry Sector and Revenue bubble chart. The bubble color will indicate the industry. The bubble size will indicate how many cases were handler a given industry. The bubbles will be positioned in a grid with X-Axis being the average revenue and the Y-Axis the average approval confidence level.

_1. Click **Chart +**



_2. In *Client Onboarding- Create chart* window, 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

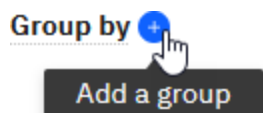
_1. For *Monitoring source* select Workflow (Case) – Client Onboarding

Monitoring context

Monitoring source

Workflow (Case) - Client Onboarding

_2. Click **Add a group +** button



_3. Select **CO_Industry (data) – (keyword)**

CO_Industry (data) - (keyword)

_4. Click **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) |

_5. 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) |

_6. Use the **Down Arrow** on the Count Aggregation to move it to the bottom (make it the last Aggregation).

Function

Count

Data item

Select a data item

↑

↓

🗑️

Your Aggregations setting should look exactly like this:

Aggregation

Function

Average

Data item

CO_AnnualRevenue (data) - (long)

↑

↓

🗑️

Function

Average

Data item

CO_RiskConfidence (data) - (float)

↑

↓

🗑️

Function

Count

Data item

Select a data item

↑

↓

🗑️

2.2.7.2 Define Visualization Information

_1. Click **Visualization** tab

Monitoring
Select data

Filters
Refine selection

Visualization

Display data

Visualization

_2. For Bubble settings enter:

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

Trend settings

X axis label

Date

Y axis label

Approvals

_3. Click **Done**

?

cp4badmin

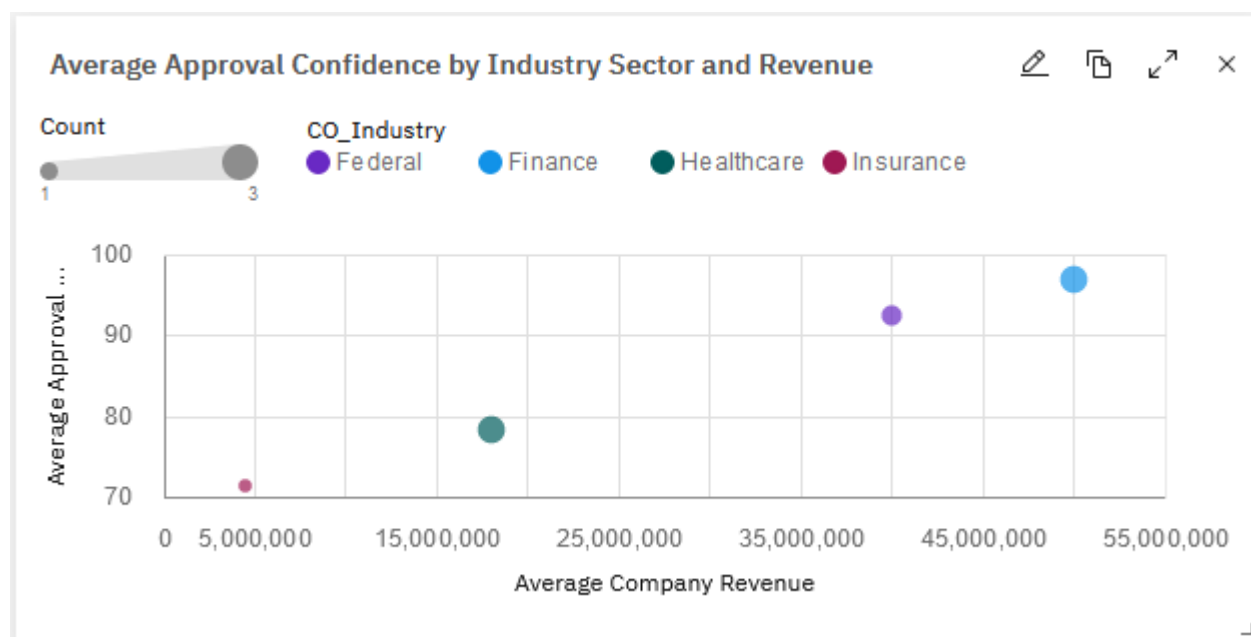
➔

Cancel

Done

_4. On the Dashboard Toolbar click **Save** icon to save you work!

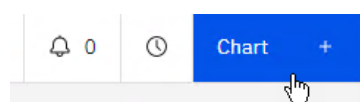
Your chart should look similar to this



2.2.8 Create “Activity Duration Distribution in Case Completion” Chart

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

_1. Click **Chart +**



_2. In *Client Onboarding- Create chart* window, 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

Workflow (Case) - Client Onboarding

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

Aggregation +

Function

Average

Data item

duration-seconds - (long)

_3.

_4. Click **Add a group +** button

Group by +

Add a group

_5. Select task-name – (keyword)

Group by +

task-name - (keyword)

_6. Set visualization type to **Donut**

Metric

Donut



2.2.8.2 Define Visualization Information

_1. Click **Visualization** tab

Monitoring
Select data

Filters
Refine selection

Visualization
Display data
Visualization

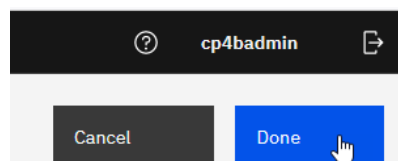
_2. For *Donut settings* set *Unit* to **Activity**

Donut settings

Unit

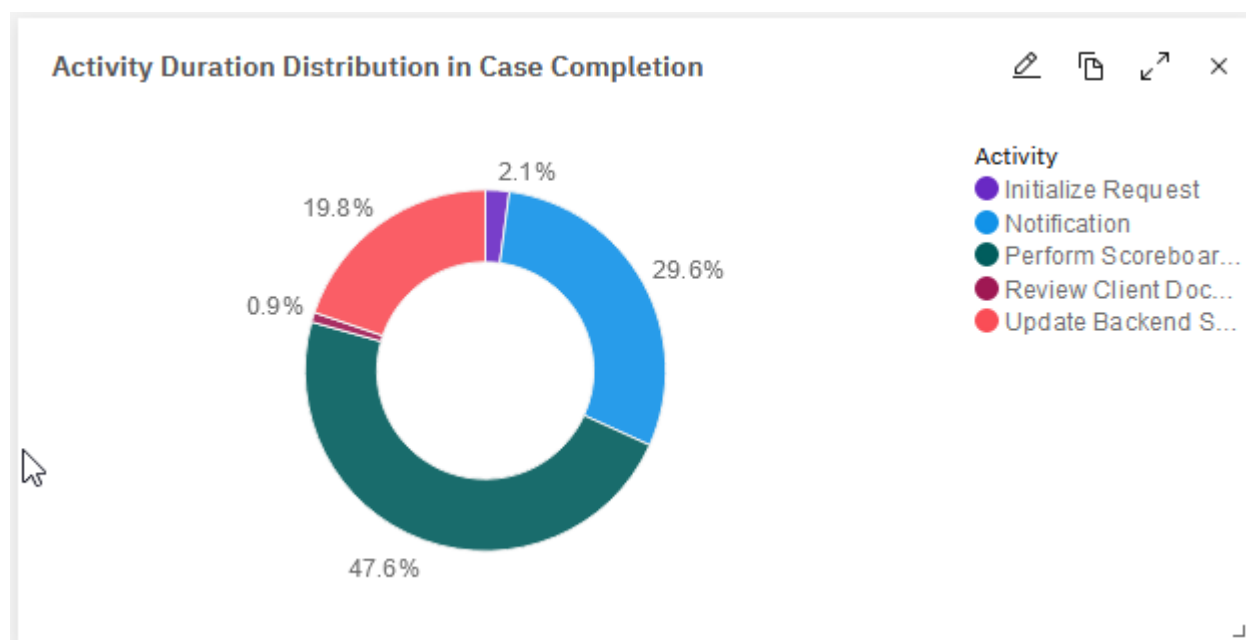
Activity

_3. Click **Done**



_4. On the Dashboard Toolbar click **Save** icon to save you work!

You chart should look similar to this



2.2.9 Create “Completed Cases per Day” Chart

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

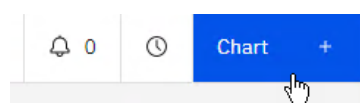
Note that the title states “per Day” but given the data set used for this lab the scale set “per Minute”.

This chart will also include two advanced features:

1. Predictions – you will be predict number of cases completed in the future (20 future days into the future). This is a very value tool to enable capacity human resources planning.
2. Alerts – you will be visual indications when number of cases completed falls below 2 in a given time period.

Note that the KPI Predictions are not base on ML. Depending on the data, KPI Prediction use the following algorithms: ARIMA, Seasonal ARIMA, or Exponential Smoothing.

_1. Click **Chart +**



_2. In *Client Onboarding-* Create chart window, 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

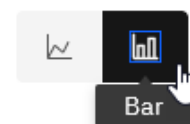
Value

3

_5. For visualization select **Bar**

Period KPI

Bar

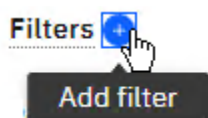


2.2.9.2 Define Filters

_1. Select **Filters** tab

Monitoring Select data Filters Refine selection Visualization Display data Thresholds Label ranges

_2. Click **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 |
| <div>AND</div> | | |
| Data item | Operator | Value |
| state - (keyword)  | =  | Complete |





_4. Enable Predictions

Prediction

 Prediction on

2.2.9.3 Define Visualization Information

_1. Click Visualization tab

| | | |
|---|---|--|
|  Monitoring Select data |  Filters Refine selection |  Visualization  Display data Visualization |
|---|---|--|

_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

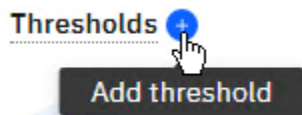
2.2.9.4 Define Thresholds

This setting allows you to customize Gage threshold setting.

_1. Select **Threshold** tab



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



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

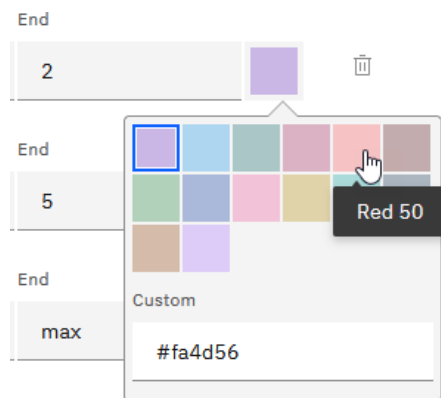
| Threshold | Data item | Value |
|-----------|----------------|----------------------|
| 1 | Threshold name | Case Completion Rate |
| | Value | 2 |
| | Range name 1 | Low |
| | Range name 2 | Normal |
| 2 | Threshold name | T2 |
| | Value | 5 |
| | Range name | High |

Your Thresholds setting should look exactly like this:

Thresholds +

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

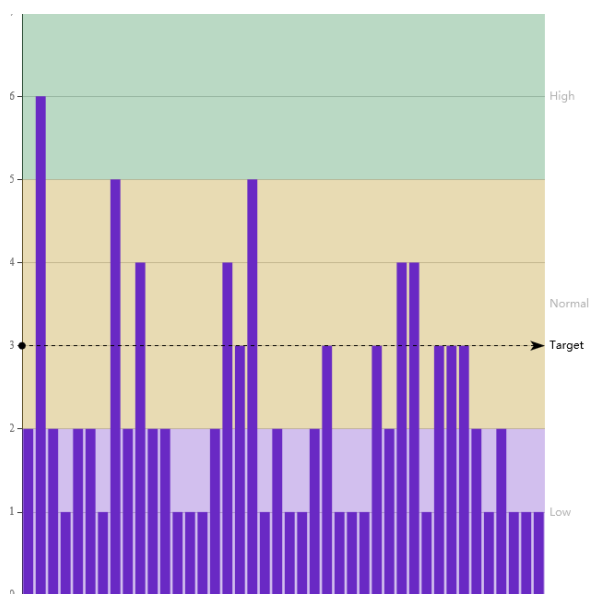
_4. Click **Purple Color patch** and then select **Red color patch** from the palette



_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 Gage threshold setting.

_1. Click Alerts +



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

Alerts 

Case Completion Rate 


_3. Configure the alert using input values shown below

| Item | Value |
|--------------------|---------------------------------|
| Alert if the value | Drops to or below the threshold |
| Message | Case completion rate is low. |


Alerts 

Case Completion Rate 

Alert if the value

drops to or below the threshold 

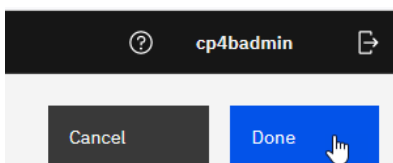
Message

Case completion rate is low. 

Priority

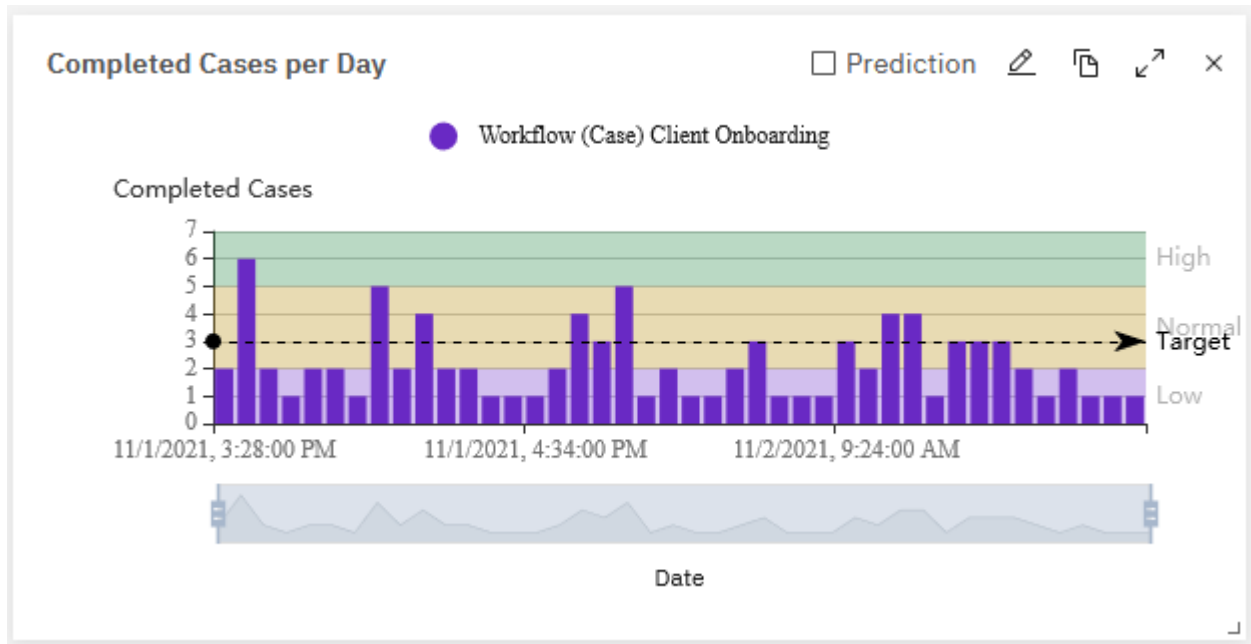
High 

_4. Click **Done**



_5. On the Dashboard Toolbar click **Save** icon to save you work!

Your chart should look similar to this

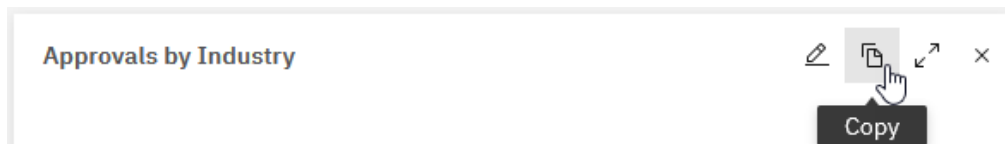


2.2.10 Create “Approvals by Industry Heatmap” Chart

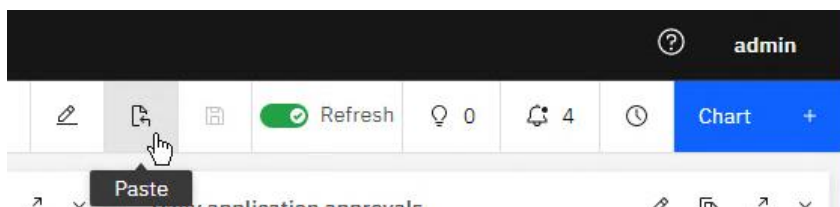
You will be creating Approvals by Industry heatmap chart. The tile color intensity will indicate count (the deeper the color the higher the count). The tiles will be positioned in a grid. The X-Axis will represent the approvals state: approved/rejected/approval pending. The Y-Axis will reflect the industry.

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

_1. On the *Approval by Industry* chart click **Copy**



_2. On the BPC main toolbar click **Paste**

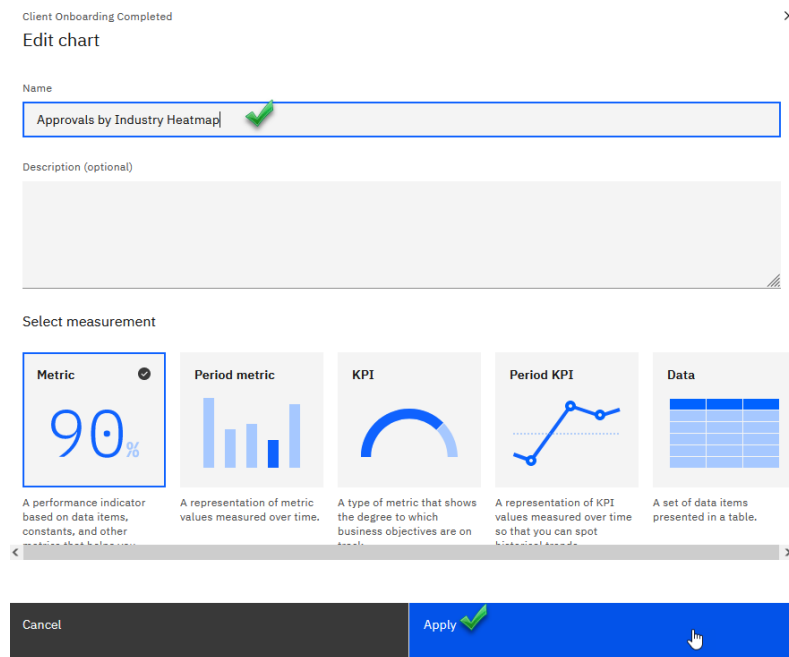


_3. On the copy of *Approval by Industry* chart click **Edit**

_4. Click **Edit configuration**



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

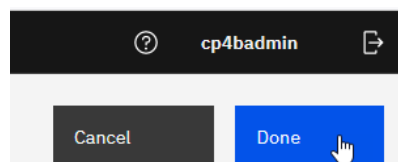


2.2.10.1 Define Monitoring Information

_1. For visualization select **Bar**

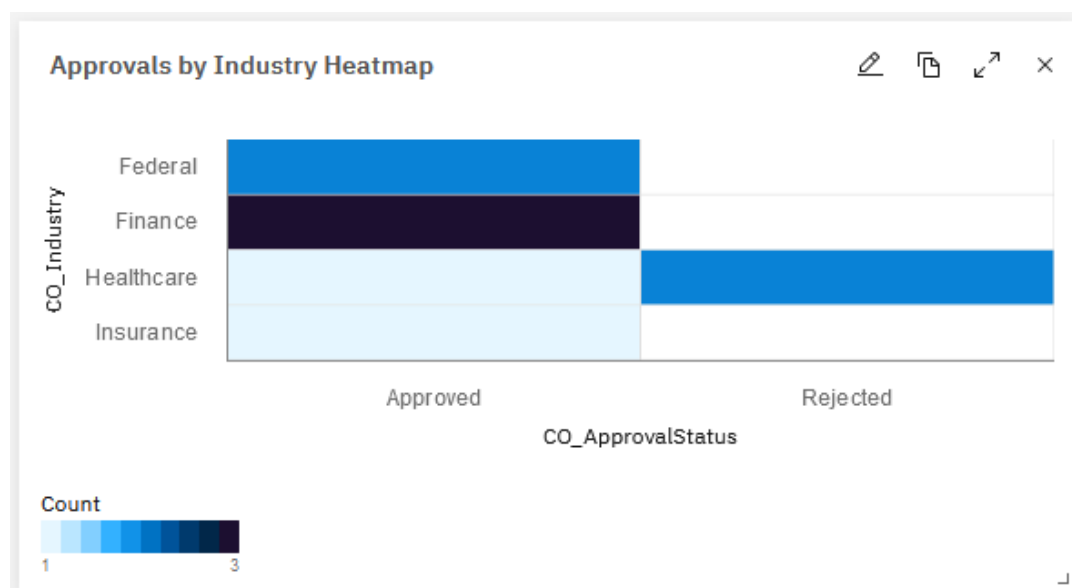


_2. Click **Done**



_3. On the Dashboard Toolbar click **Save** icon to save you work!

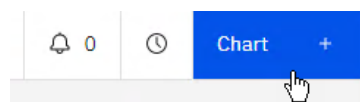
Your chart should look similar to this



2.2.11 Create “Client Onboarding Data” Chart

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

_1. Click **Chart +**



_2. In *Client Onboarding- Create chart* window, enter the following and then click **Create**:

| Item | Value |
|--------------------|------------------------|
| Name | Client Onboarding Data |
| Select measurement | Data |

Client Onboarding Completed

Edit chart

Name
Client Onboarding Data

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.

2.2.11.1 Define Monitoring Information

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

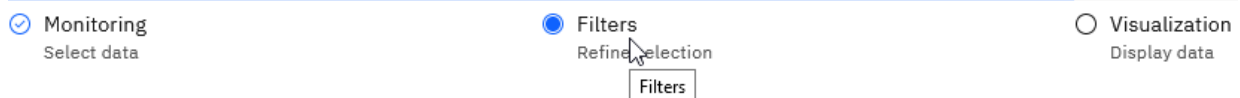
Monitoring context

Monitoring source

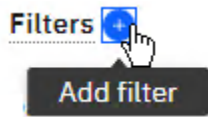
Workflow (Case) - Client Onboarding

2.2.11.2 Define Filters

_1. Select **Filters** tab



_2. Click **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 |

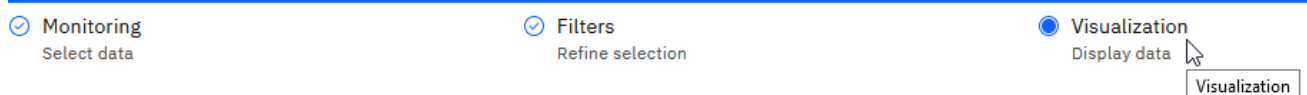
Your Filters setting should look exactly like this:

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



_1. Click **Data columns +** button **5 times** to add five data columns



_2. 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 | ↑ ↓ 🗑 |

_3. Click **Service Fee** column to sort the data by Service Fee column.

Data

5 columns, 12 rows

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

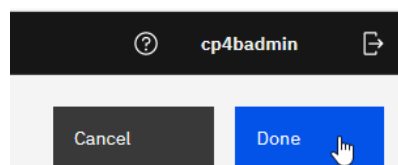
The data in the Data Chart should look similar to this

Data

5 columns, 12 rows

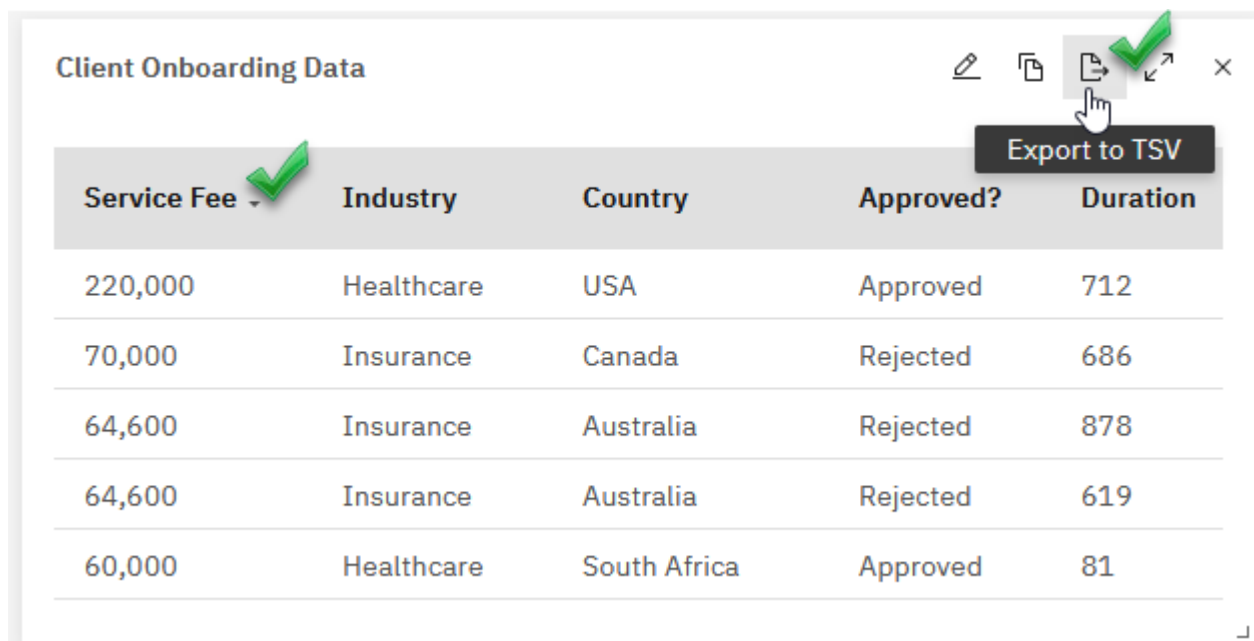
| Service Fee  | Industry | Country | Approved? | Duration |
|---|------------|--------------------------|-----------|----------|
| 35,000 | Healthcare | United States of America | Rejected | 60 |
| 25,000 | Federal | United States of America | Approved | 71 |
| 21,000 | Healthcare | United States of America | Approved | 76 |
| 21,000 | Healthcare | United States of America | Rejected | 84 |
| 15,000 | Finance | United States of America | Approved | 51 |
| 15,000 | Finance | United States of America | Approved | 59 |
| 15,000 | Federal | Canada | Approved | 52 |
| 15,000 | Finance | United States of America | Approved | 59 |

_4. Click **Done**



_5. On the Dashboard Toolbar click **Save** icon to save you work!

The chart should look similar to this



| Service Fee | Industry | Country | Approved? | Duration |
|-------------|------------|--------------|-----------|----------|
| 220,000 | Healthcare | USA | Approved | 712 |
| 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 |

Note:

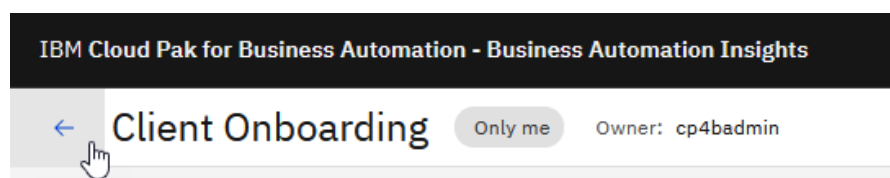
1. If you can sort the data in the chart. For example in the screen shot above the chart is sorted by Service Fee column
2. You can export the data in the chart as a spreadsheet in the TSV format.

2.2.12 Create a Configure Goal

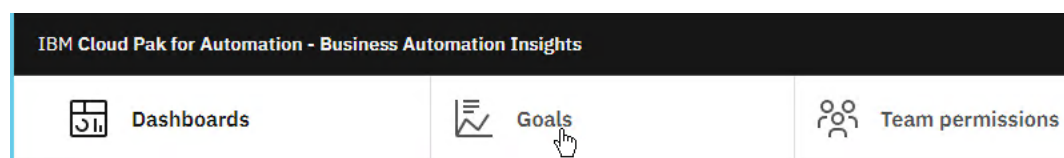
A Goal is a business statement that brings purpose and scope to your dashboards. Goals are used to aggregate charts within a dashboard and to give dashboards a business purpose. A Goal's definition include: the details of a specific objective you want to achieve; the time-frame for achieving an objective;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

2.2.12.1 Create a Goal

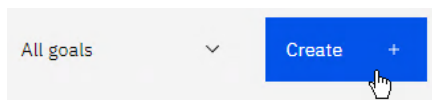
_1. Click the **Arrow** to the left of Client Onboarding dashboard



_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 KPI identified by 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



_9. Click **Save**



Goal specification

Goal classification (optional)

Enter category

Priority

☐ Low ☐ Medium ☒ High ✓

Start date

☒ Now

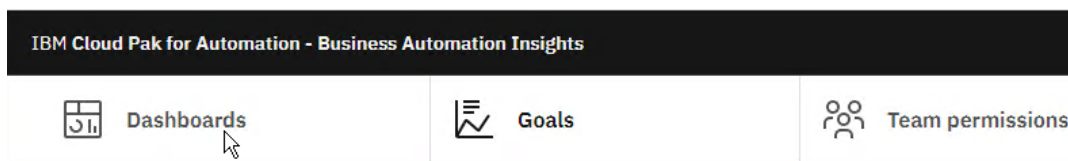
☐ Custom

10/25/2021




2.2.12.2 Set business goal for selected charts

_1. Click **Dashboards**

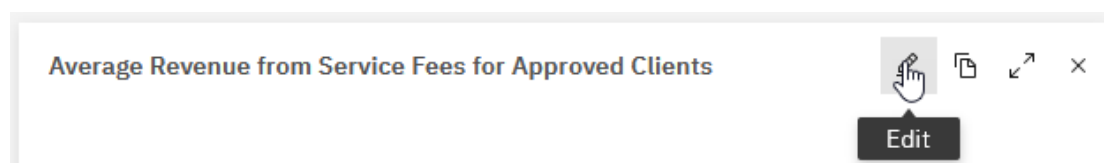


_2. Click **Client Onboarding** dashboard

[Client Onboarding](#)  

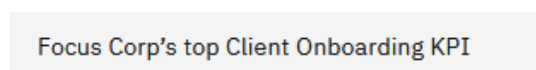
Open

_3. On Average Revenue from Service Fees for Approved Clients dashboard click **Edit** button

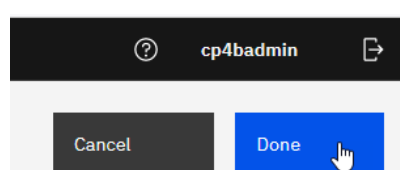


_4. For Business goal, from the drop-down list select **Focus Corp's top Client Onboarding KPI**

Business goal

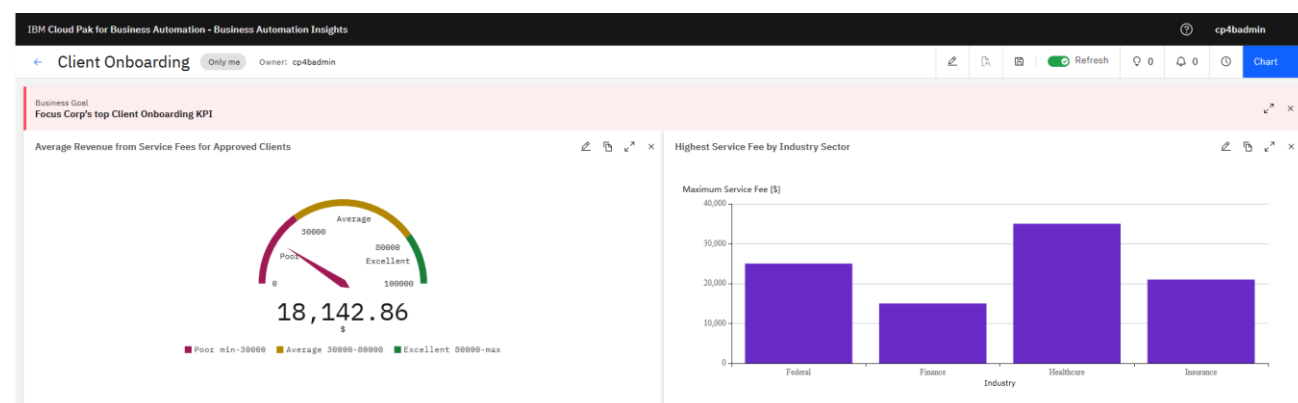


_5. Click **Done**



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

Your dashboard should now look similar top this:

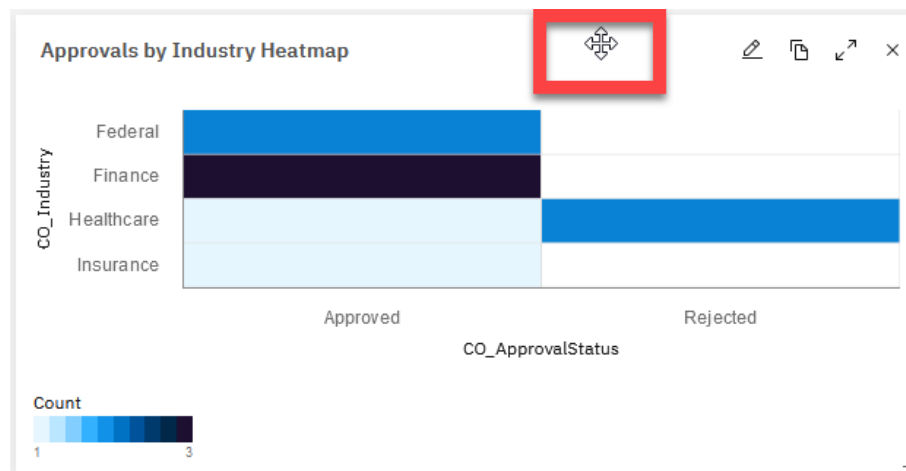


2.2.13 Change Dashboard Layout

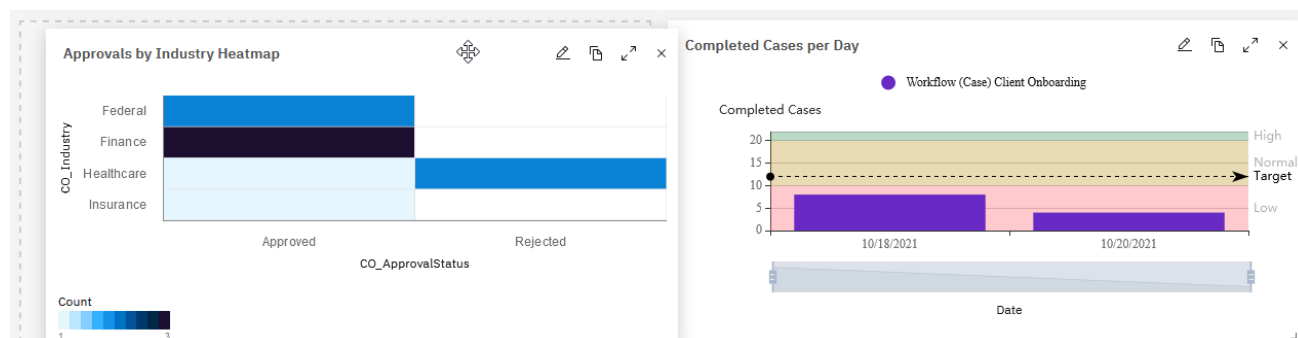
You will now customize your dashboard by moving and changing chart sizes.

2.2.13.1 Move Approvals by Industry Heatmap Chart

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

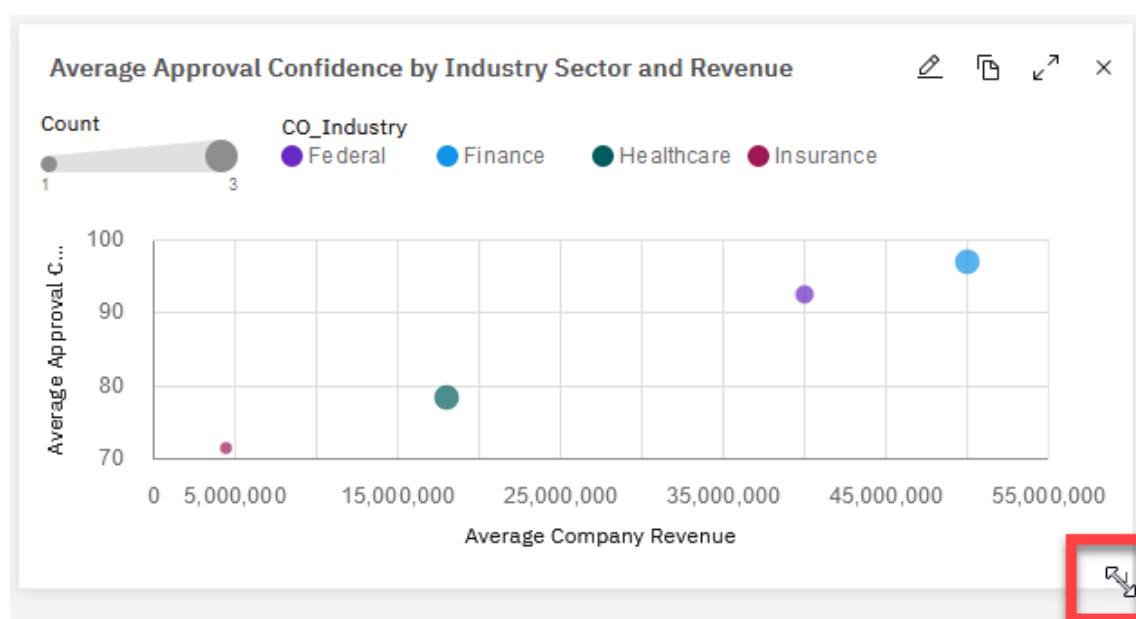


_2. **Drag** the chart to the empty area to the left of the Completed Cases per Day chart

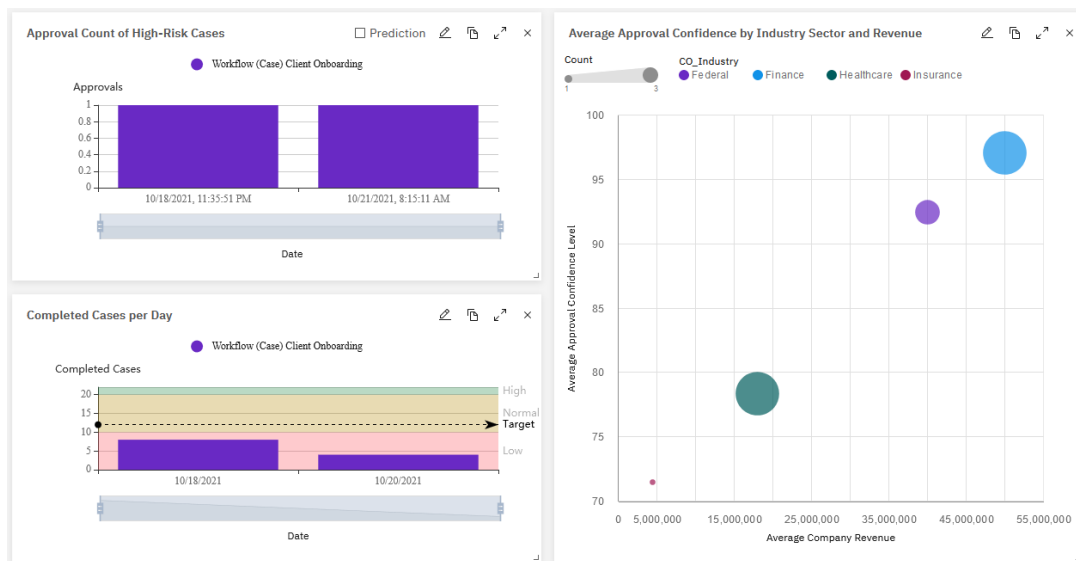


2.2.13.2 Expand Chart Average Approval Confidence by Industry Sector and Revenue

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

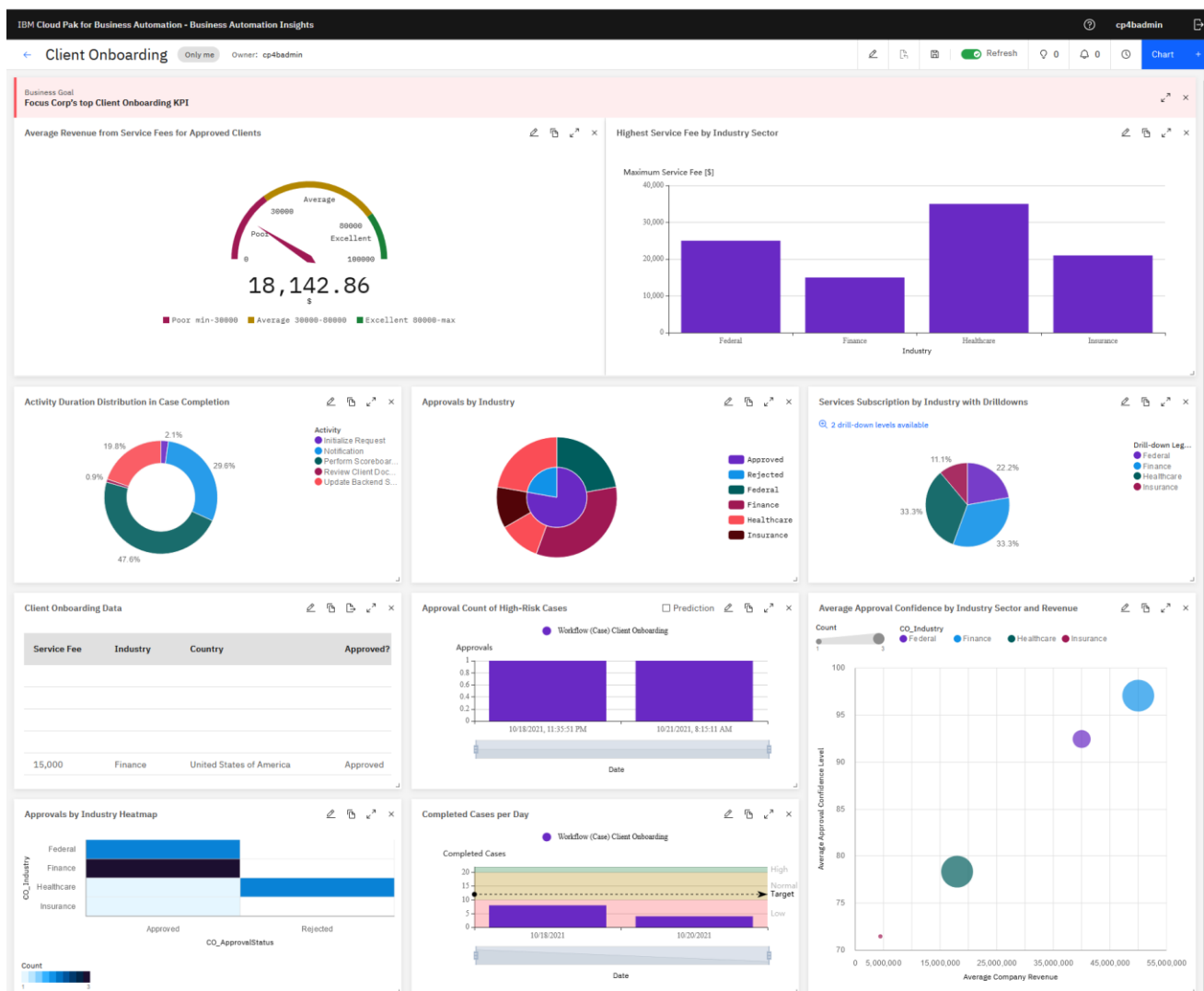


_2. **Stretch** the chart downwards until it achieves the height of two charts



_3. On the Dashboard Toolbar click **Save** icon to save you work!

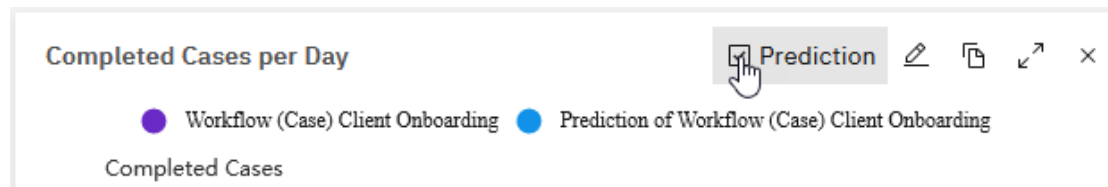
Your final version of the Client Onboarding Dashboard should now look similar to this:



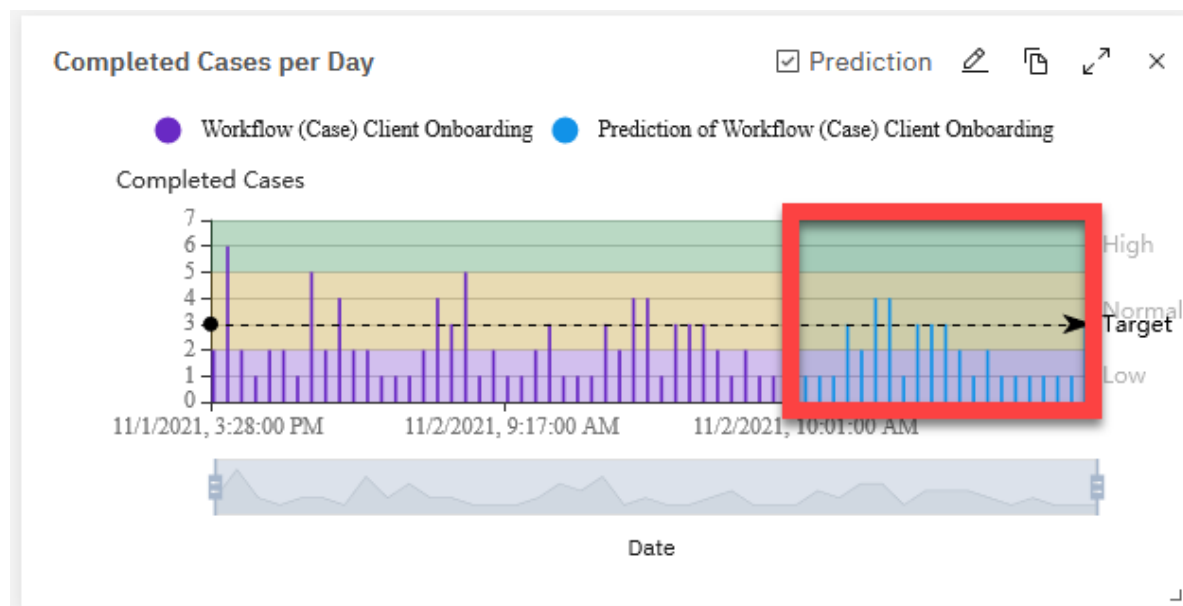
2.2.14 Explore Advanced Dashboard Features

2.2.14.1 KPI Predictions

_1. On the *Completed Cases per Day* chart click **Predictions**

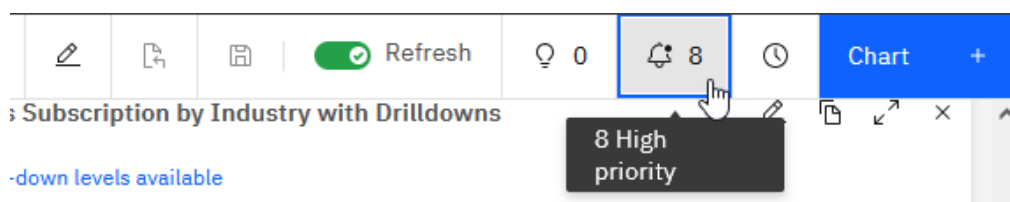


You should now see the predicted case completion rate information



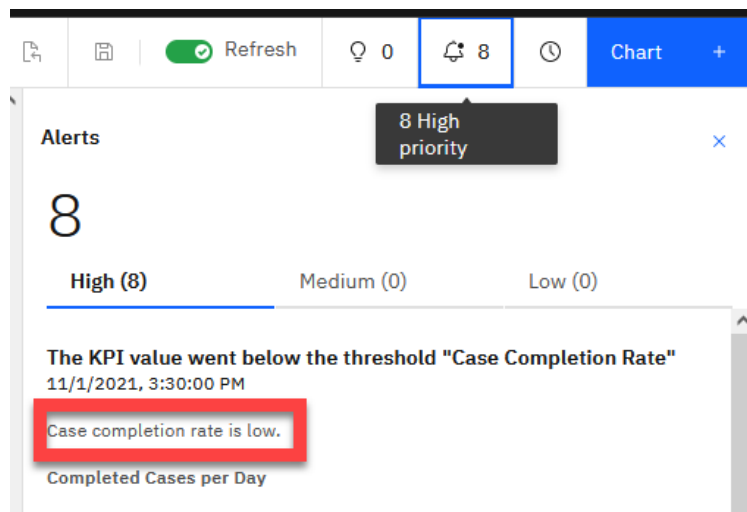
2.2.14.2 Dashboard Alerts

_1. Click **Alert** icon in the toolbar on top of the Dashboard



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

Because you are in this shared environment, you may see more alerts generated when other users work on the Client Onboarding case.



2.3 Summary

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