

IBM Cloud Pak for Business Automation

Demos and Labs

Operational Intelligence

IBM Business Automation Insights

Build Business Performance Center Dashboard

CP4BA 2022.3

Lab version: 1.0

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Table of Contents

1 Lab Introduction	4
1.1 Introduction to IBM Business Automation Insights.....	4
1.2 Lab Overview	4
1.3 Lab Setup Instructions	6
2 Exercise: Create Client Onboarding Workflow Dashboard	7
2.1 Introduction.....	7
2.2 Exercise Instructions.....	7
2.2.1 Create a Dashboard	7
2.2.2 Create "Average Revenue from Service Fees for Approved Clients" Chart.....	8
2.2.3 Create "Approvals by Industry" Chart	13
2.2.4 Create "Services Subscription by Industry with Drilldowns" Chart	15
2.2.5 Create "Highest Service Fee by Industry Sector" Chart	18
2.2.6 Create "Approval Count of High-Risk Cases" Chart	20
2.2.7 Create "Average Approval Confidence by Industry Sector and Revenue" Chart	22
2.2.8 Create "Activity Duration Distribution in Case Completion" Chart	25
2.2.9 Create "Completed Cases per Day" Chart	27
2.2.10 Create "Approvals by Industry Heatmap" Chart	32
2.2.11 Create "Client Onboarding Data" Chart	34
2.2.12 Create a Configure Goal.....	38
2.2.13 Change Dashboard Layout.....	40
2.2.14 Explore Advanced Dashboard Features	42
2.3 Summary	44
Appendix A. IBM Business Automation Insights Architecture	45

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.

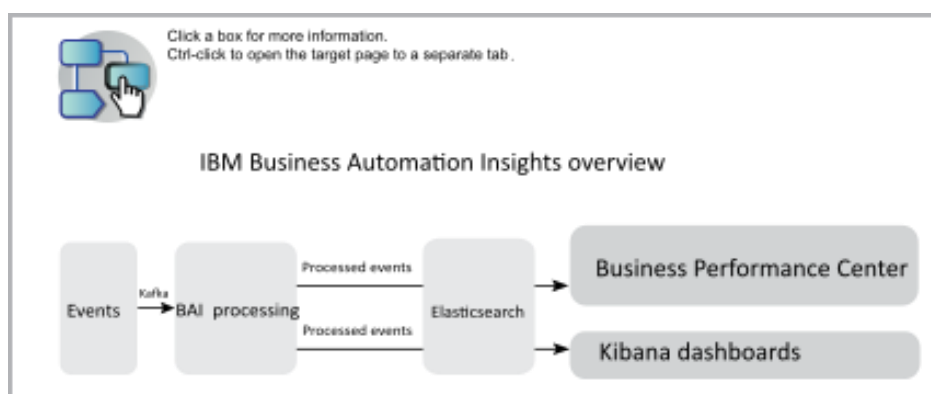


Figure 1. IBM Business Automation Insights Architecture

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 that implement 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 ⓘ 🔒 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>

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)

Type Processes 6

Client Onboarding

Processes

User interface

Exposed Automation Services

Initialize Request

New Client Onboarding Request

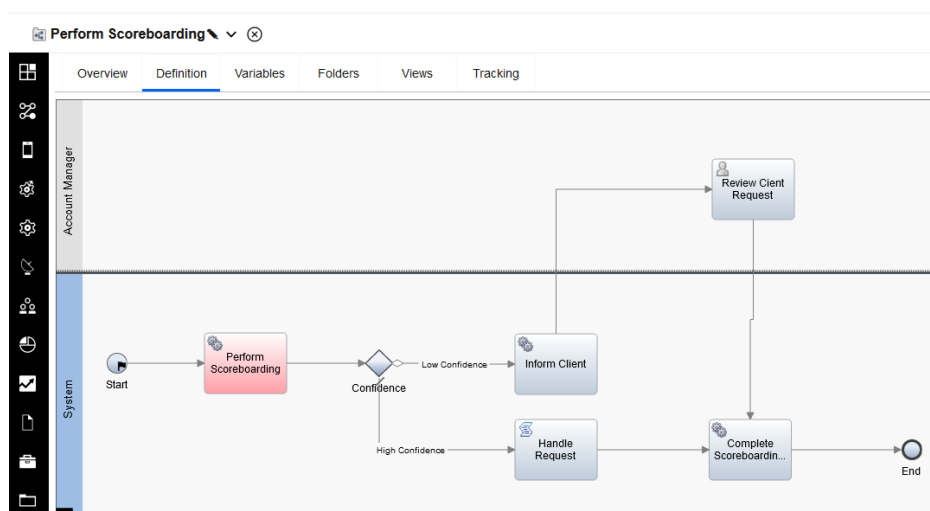
Notification

Perform Scoreboarding

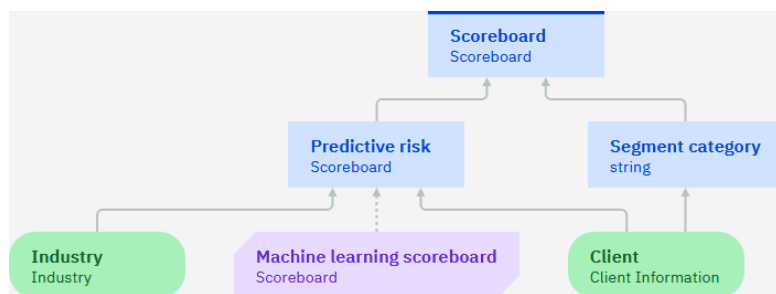
Review Client Documents

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.



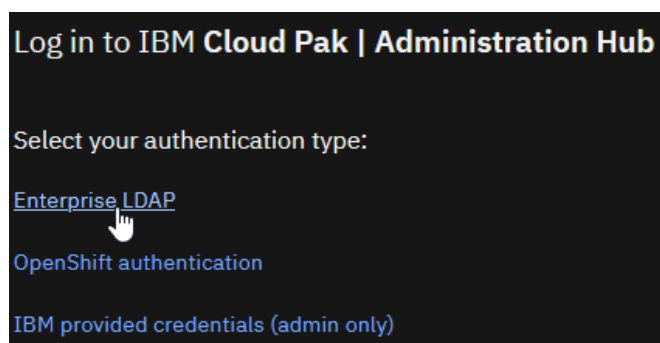
When authoring one of the Charts on the dashboard, you will be using data generated by the above decision.

1.3 Lab Setup Instructions

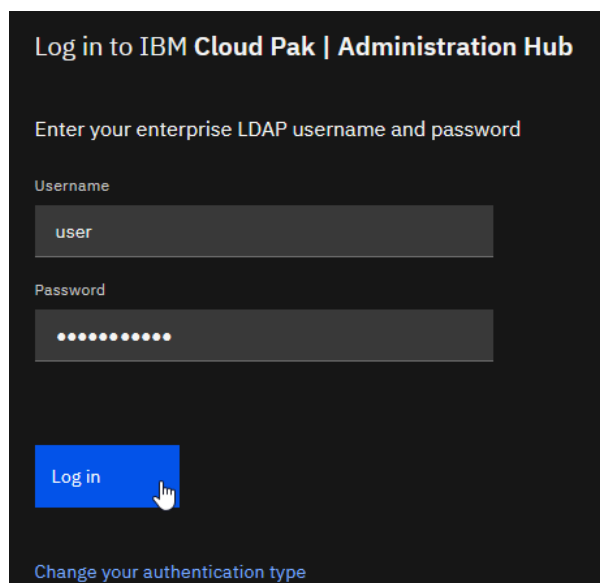
_1. If you are performing this lab as part of an IBM event, access the document that lists the available systems, URLs, and login instructions. For this lab, you will need to access **IBM Business Performance Center**.

_2. Paste the Business Performance Center URL to your web browser.

_3. Select the **Enterprise LDAP** login option.



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

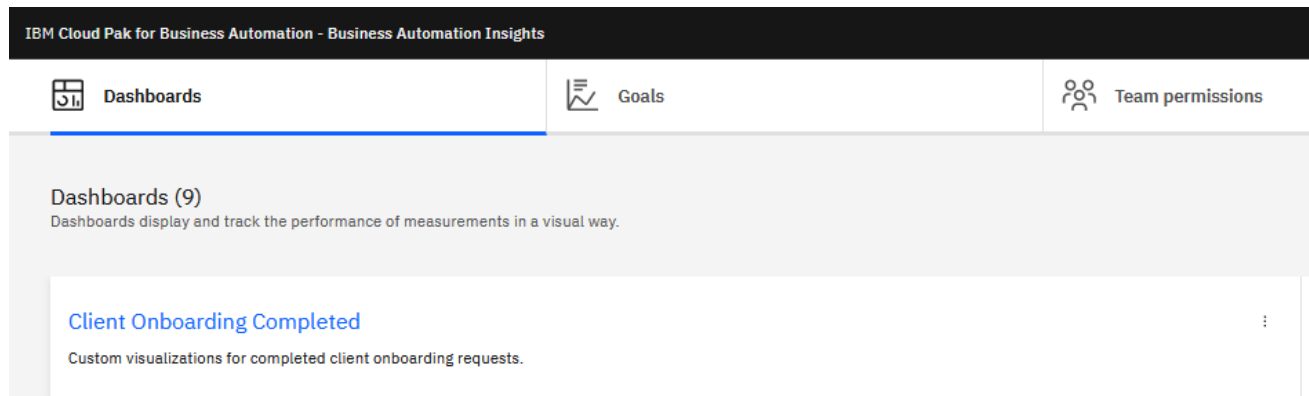


2 Exercise: Create Client Onboarding Workflow Dashboard

2.1 Introduction

In this lab exercise, you will use BPC to create a business dashboard that will enable a business user to get 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 built 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 of the 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:

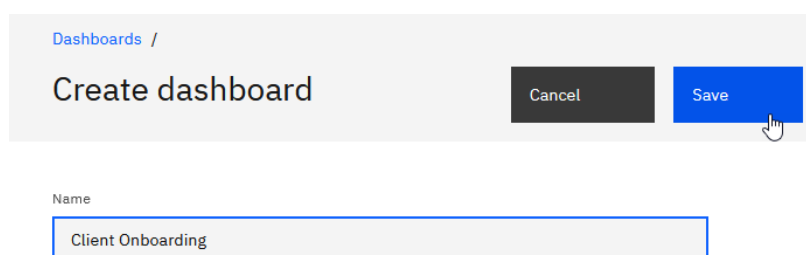
- Client Onboarding **Dashboard**
- **Charts** used in the Client Onboarding dashboard
- A chart **Alert**
- A **Goal** to group related charts

2.2.1 Create a Dashboard

_1. Click **Create +**



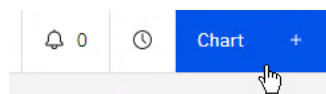
_2. For *Name*, enter **Client Onboarding** and click **Save**



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

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

_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

_2. This will select events from the Client Onboarding workflow.

_3. In *Aggregation*, for *Function* select **Average** and *Data item* select **CO_ServicesFee (data) – (long)**

Aggregation

Function

Average

Data item


CO_ServicesFee (data) - (long)

If you wonder how this Case Property was sent to BAI, look at these comments...

CO in CO_ServicesFee is the Client Onboarding Solution prefix.

Client Onboarding

Overview Properties Roles In-baskets



Solution prefix:
CO

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

IBM Business Automation Workflow Case administration

Solutions × Manage Audit Configuration ×

⏪ Back ⏩ Next Save Apply Cancel

Add properties to audit

Add Remove

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

To continue the lab...


_4. Click **Targets +**

Targets +

Add target

_5. For *Value* enter **80000**

Targets 

Label	Value	
New target	80,000	

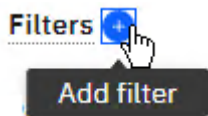
2.2.2.2 Define Filter Data

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

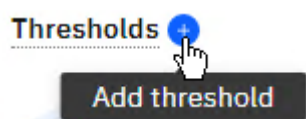
2.2.2.4 Define Thresholds

This setting allows you to customize the Gauge threshold setting.

_1. Select the **Thresholds** tab.

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

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



_3. For each group, enter the following values:

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	<div style="width: 20px; height: 20px; background-color: #9933cc; border: 1px solid #ccc;"></div>
		Average	30,000	80,000	<div style="width: 20px; height: 20px; background-color: #3399ff; border: 1px solid #ccc;"></div>
Above	80,000	Excellent	80,000	max	<div style="width: 20px; height: 20px; background-color: #339999; border: 1px solid #ccc;"></div>

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

Start

End

min

30,000

Start

End

30,000

80,000

Red 50

Start

End

80,000

max

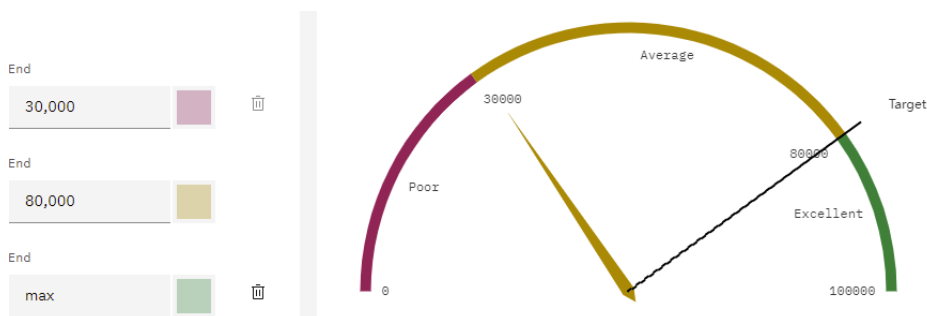
Custom

#6929c4

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

Item	Value
80,000	Yellow
max	Green

The color settings should look exactly like this:



_6. Click **Done**

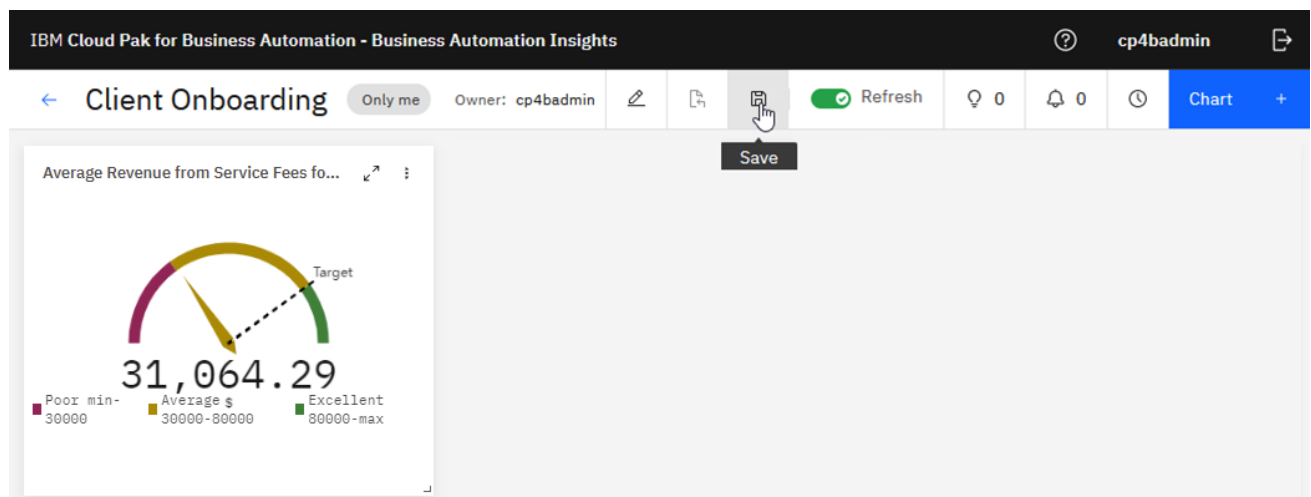
?

⌕

Cancel

Done

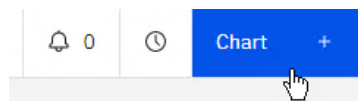
_7. Click the **Save icon** on the toolbar above the dashboard to save your work!



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 **Group by +** button two times

Group by +

Enter the following values for the *Group by* entries:

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

Group by +

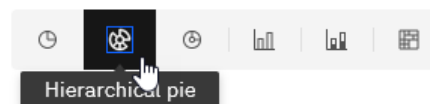
CO_ApprovalStatus (data) - (keyword)

CO_Industry (data) - (keyword)

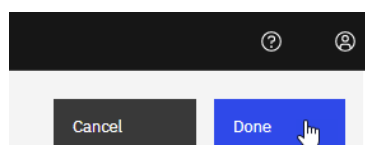
_3. For chart, type select **Hierarchical pie**

Metric

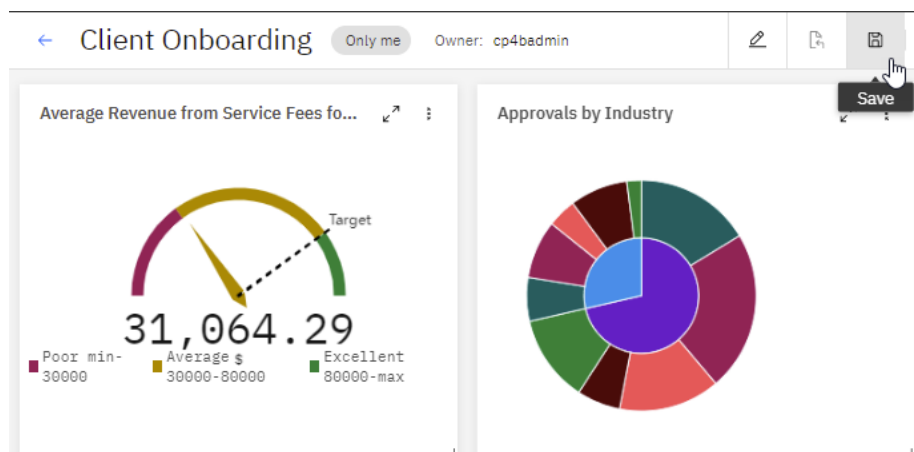
Hierarchical pie



_4. Click **Done**



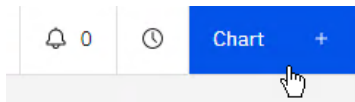
_5. Click the **Save** icon on the toolbar above the dashboard to save your work!



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 **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)


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) 

_4. For chart type, select **Pie** (this should be the default)

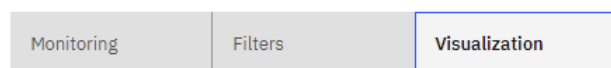
Metric

Pie



2.2.4.2 Define Visualization Information

_1. Click the **Visualization** tab



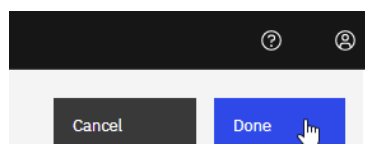
_2. For *Pie settings* > *unit* enter **Drill-down Legend**

Pie settings

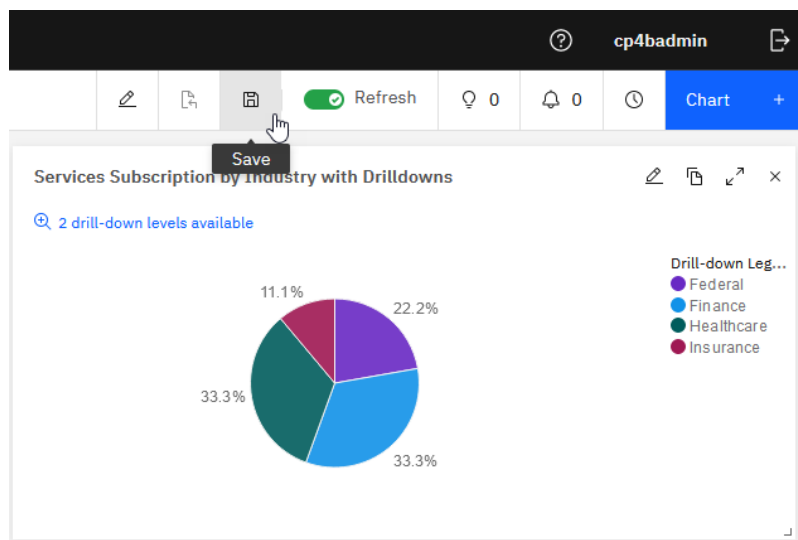
Unit

Drill-down Legend

Click **Done**

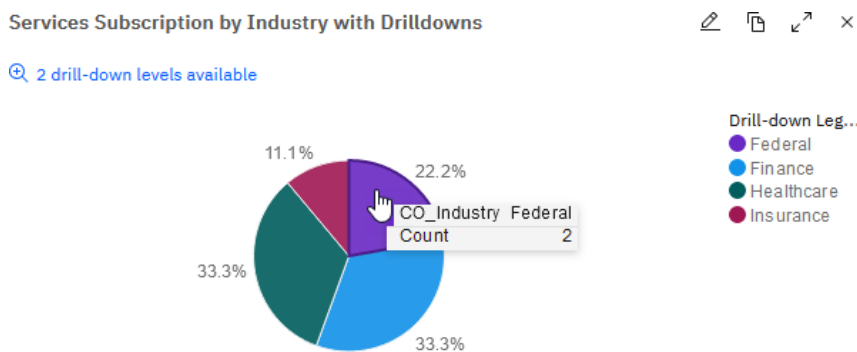


On the toolbar above the Dashboard, click the **Save** icon to save your work!

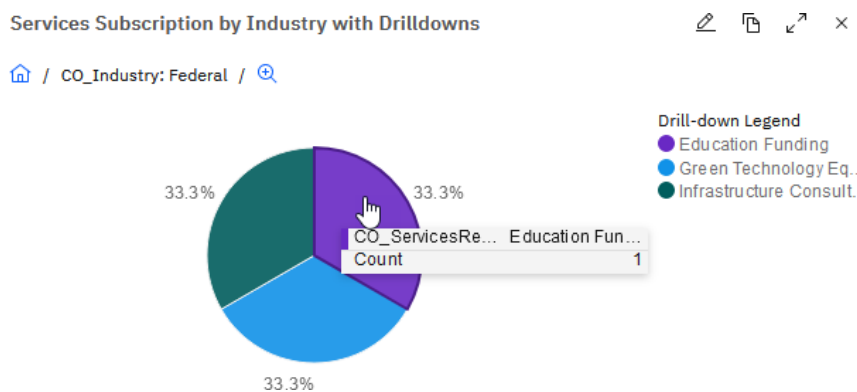


2.2.4.3 Explore Drill-down capability

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

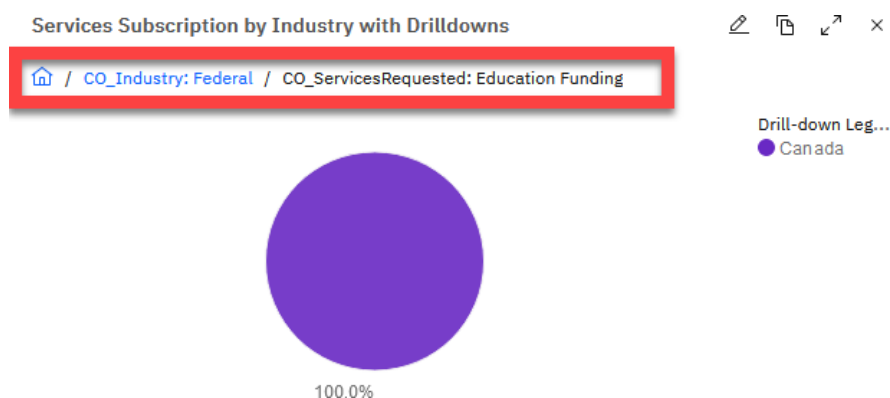


_2. Select the second drill-down level by clicking on **Education Funding** Service

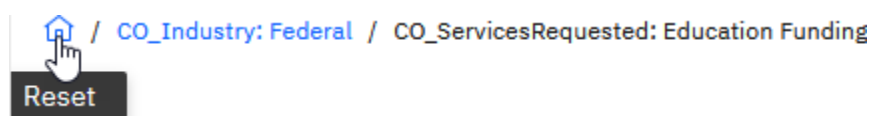


_3. You should now see all the countries for *Federal > Education Funding* grouping.

Note the breadcrumbs,



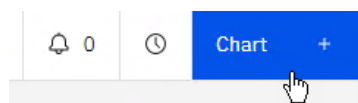
_4. Click **Reset** to get back to the original view



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 +**



Enter the following and then click **Create**:

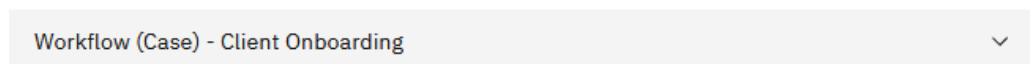
Item	Value
Name	Highest Service Fee by Industry Sector
Select measurement	Metric

2.2.5.1 Define Monitoring Information

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

Monitoring context

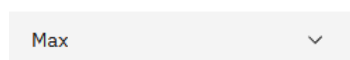
Monitoring source



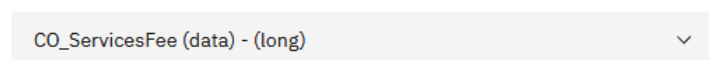
_2. In *Aggregation*, for *Function* select **Max** and for *Data item* select **CO_ServicesFee(data) – (long)**

Aggregation +

Function



Data item




_3. Click **Group by +** button

Group by +

_4. Enter **CO_Industry (data) – (keyword)**

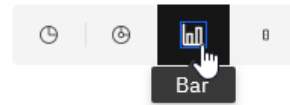
Group by 

CO_Industry (data) - (keyword) 

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

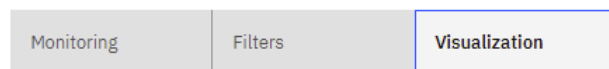
Metric

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

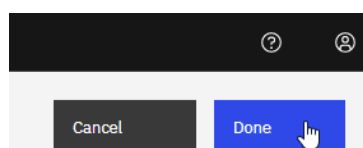
X axis label

Industry

Y axis label

Maximum Service Fee [\$]

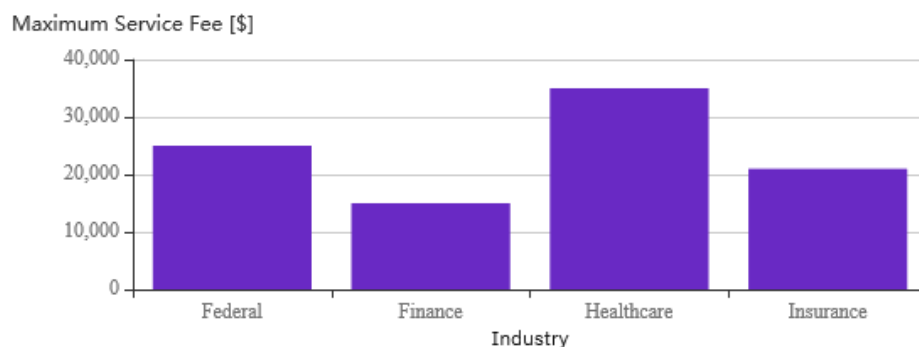
_3. Click **Done**



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

Your chart should look similar to this:

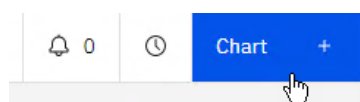
Highest Service Fee by Industry Sector



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

This bar chart will 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

Workflow (Case) - Client Onboarding

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

Interval

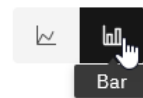
Time interval

Custom Every 1 Minute(s)

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

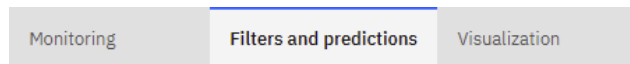
Period metric

Bar

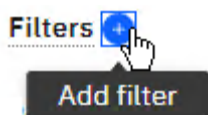


2.2.6.2 Define Filters and Predictions

_1. Select **Filters and predictions** tab



_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

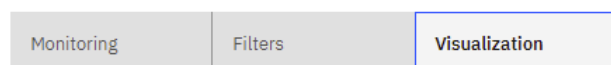
Your Filters setting should look exactly like this:

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

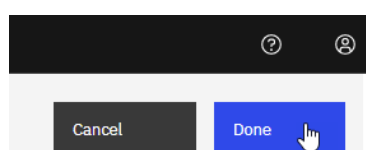
X axis label

Date

Y axis label

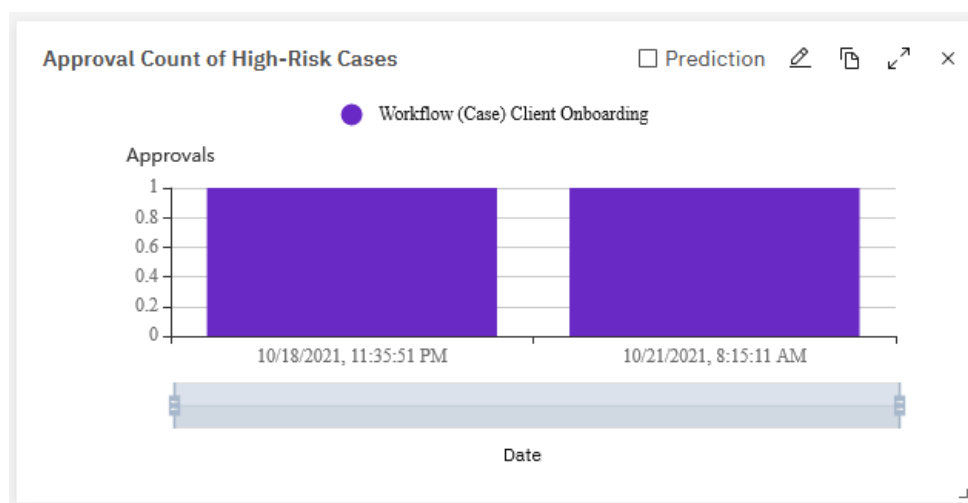
Approvals

_3. Click **Done**



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

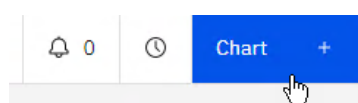
Your chart should look similar to this.



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 **Group by +** button

Group by +

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

CO_Industry (data) - (keyword)

_3. Click the **Aggregation +** button twice to add two aggregations

Aggregation +

Add an aggregation

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)

_4. 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)

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

↑

↓

🗑️

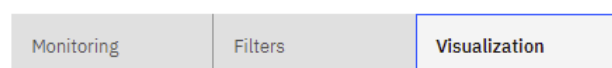
Your aggregations setting should look exactly like this:

Aggregation

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

2.2.7.2 Define Visualization Information

_1. Click **Visualization** tab



_2. For Bubble settings, enter:

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

Bubble settings

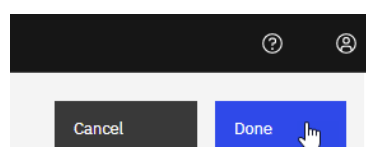
X axis label

Average Company Revenue

Y axis label

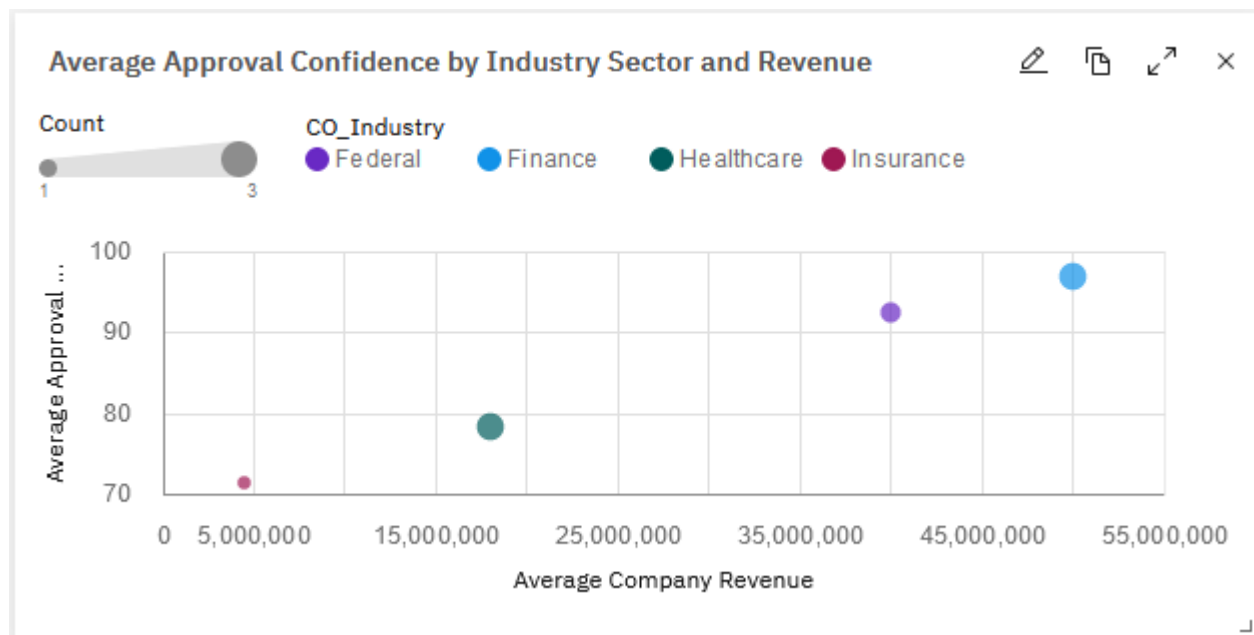
Average Approval Confidence Level

_3. Click **Done**



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

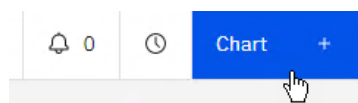
Your chart should look similar to this.



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

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. Click **Group by +** button

Group by 

_4. Select **task-name – (keyword)**

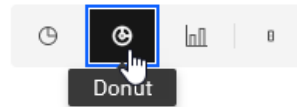
Group by 

task-name - (keyword) 

_5. Set visualization type to **Donut**

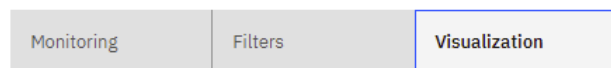
Metric

Donut



2.2.8.2 Define Visualization Information

_1. Click **Visualization** tab



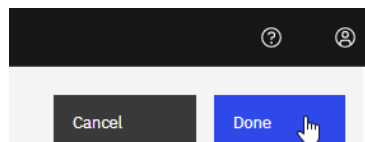
_2. For *Donut settings*, set *Unit* to **Activity**

Donut settings

Unit

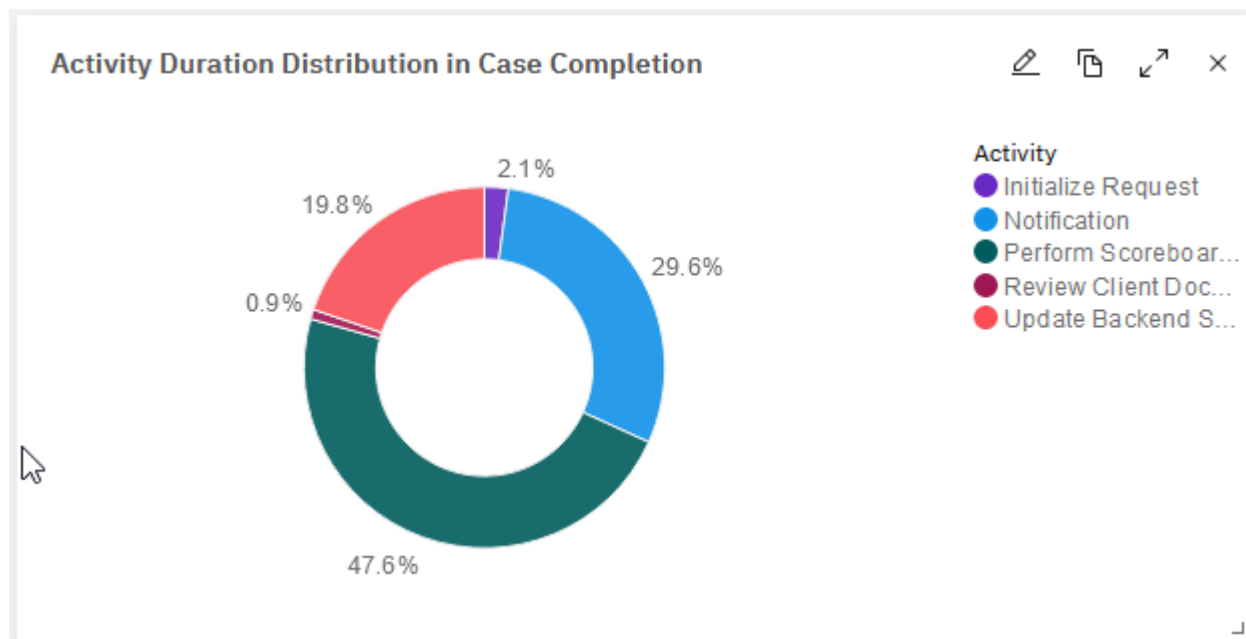
Activity

_3. Click **Done**



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

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.

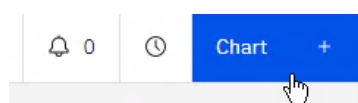
Note that the title states "per Day," but given the data set used for this lab, the scale set "per Minute".

This chart will also include two advanced features:

1. 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.
2. 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

Targets



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

Targets +

Label

Target

Value

3

For visualization, select **Bar**

Period KPI

Bar



2.2.9.2 Define Filters

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

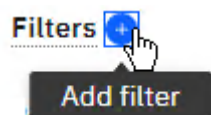
Monitoring

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
		
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	Visualization
------------	---------	----------------------

_2. For Trend settings, enter:

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

Trend settings

X axis label

Y axis label

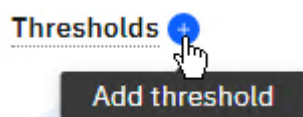
2.2.9.4 Define Thresholds

This setting allows you to customize the Gage threshold setting.

_1. Select **Thresholds** tab.

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

_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** and then select the **Red color patch** from the palette

End


2








End


5
























































Custom

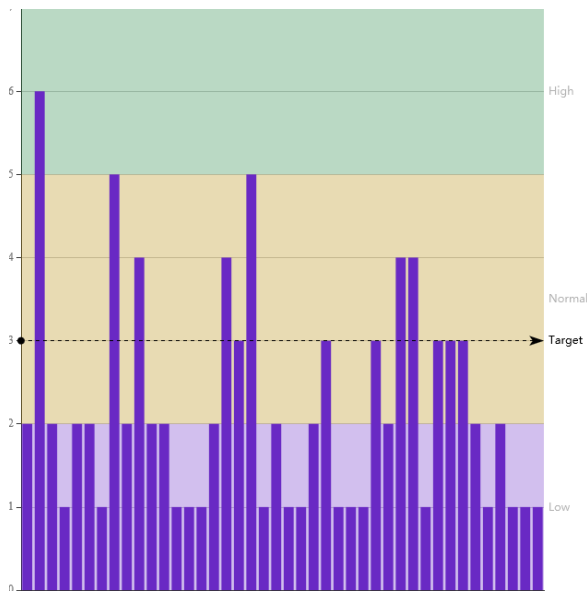
#fa4d56

Page 30 of 45

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

Item	Value
Normal	Yellow
High	Green

The color settings should look exactly like this:



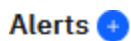
2.2.9.5 Define Alert

This setting allows you to customize the Gage threshold setting.

_1. Click Alerts +



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



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	The case completion rate is low.

Alerts +

Case Completion Rate ▼

Alert if the value

drops to or below the threshold ▼

Priority

High ▼

Message

Case completion rate is low. ^

_4. Click **Done**

?
👤

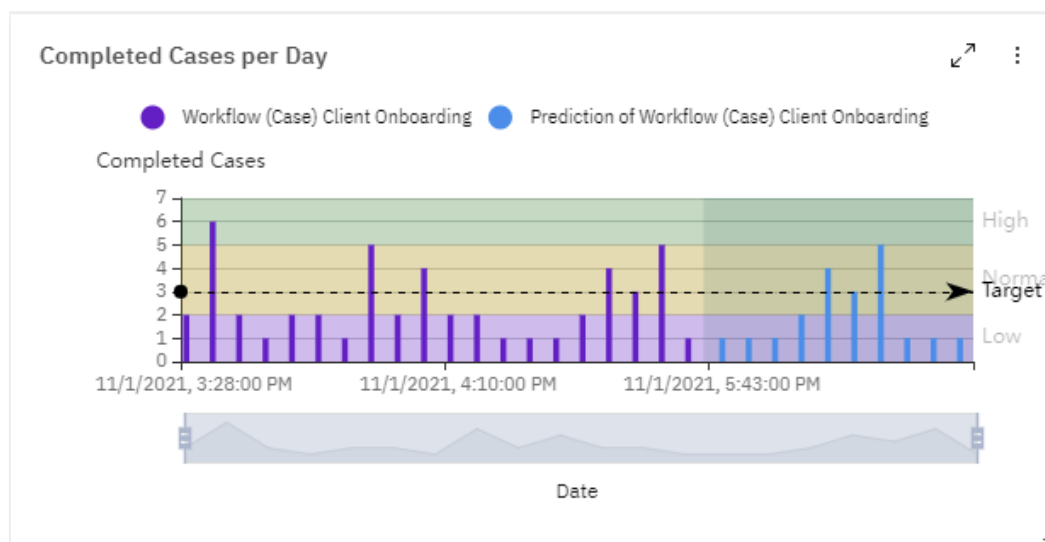
Cancel

Done 👉

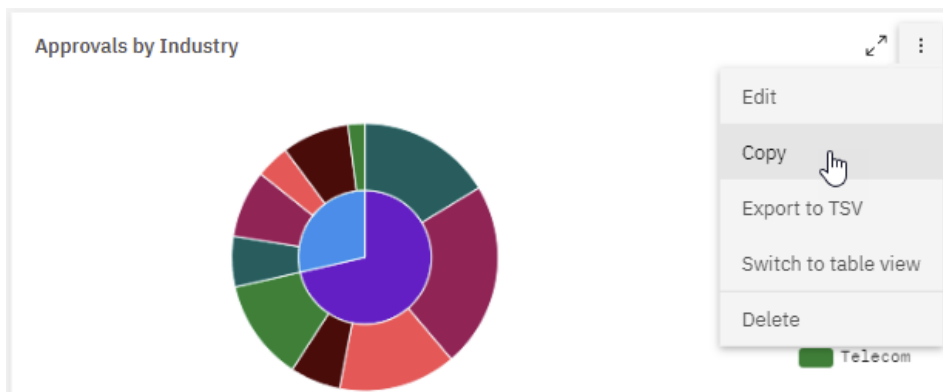
Note, some alerts may appear temporarily on the right side of the dashboard, this is expected.

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

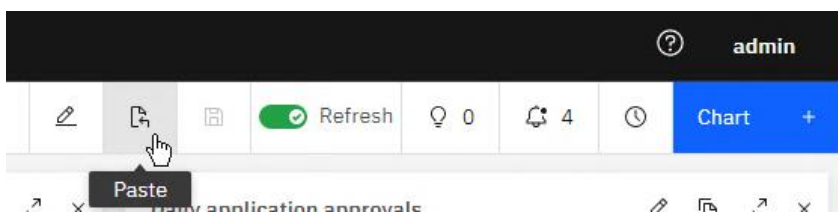
Your chart should look similar to this.



_1. On *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**.
Next to the chart name, click **Edit configuration**.



_4. For *Name*, enter **Approvals by Industry Heatmap** and then click **Apply**.

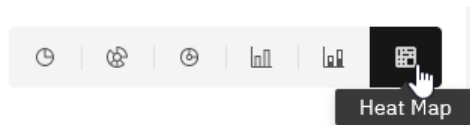
The 'Edit chart' configuration form is shown. At the top, it says 'Client Onboarding Completed' with a close button. The form has a 'Name' field containing 'Approvals by Industry Heatmap' with a green checkmark. Below it is a 'Description (optional)' text area. Under 'Select measurement', there are five options: 'Metric' (selected, showing '90%'), 'Period metric' (bar chart), 'KPI' (gauge), 'Period KPI' (line chart), and 'Data' (table). Each option has a brief description below it. At the bottom, there are 'Cancel' and 'Apply' buttons. The 'Apply' button has a green checkmark and a hand cursor is pointing at it.

2.2.10.1 Define Monitoring Information

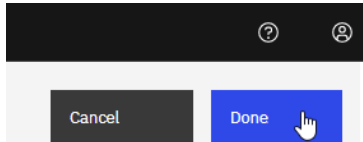
_1. For visualization, select **Heat Map**

Metric

Heat Map

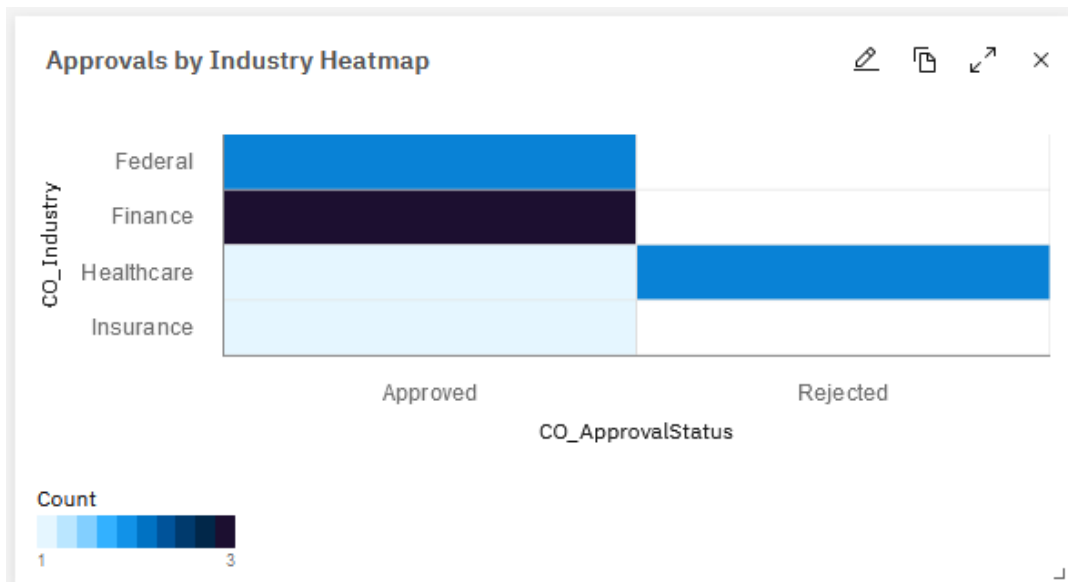


_2. Click **Done**



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

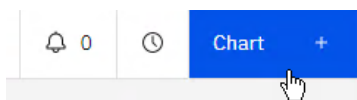
Your chart should look similar to this.



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

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

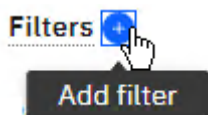
Workflow (Case) - Client Onboarding

2.2.11.2 Define Filters

_1. Select **Filters** tab

Monitoring Filters Visualization

_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		
type - (keyword) 	= 	case
AND		
state - (keyword) 	= 	Complete

2.2.11.3 Define Visualization

_1. Select **Visualization** tab.

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

_2. Click the **Data columns +** button 5 times to add five data columns.

Data columns 





















No 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, 12 rows

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

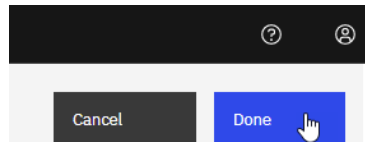
The data in the Data Chart should look similar to this.

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

_5. Click **Done**



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

The chart should look similar to this.

Client Onboarding Data					Export to TSV
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:

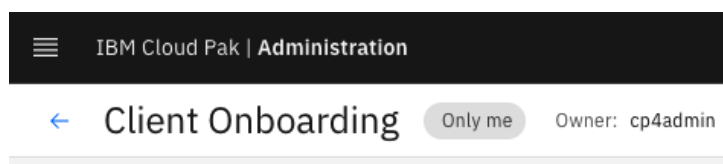
- You can sort the data in the chart. For example, in the screenshot above, the chart is sorted by Service Fee column.
- You can export the data in the chart as a spreadsheet in the TSV format.

2.2.12 Create a Configure Goal

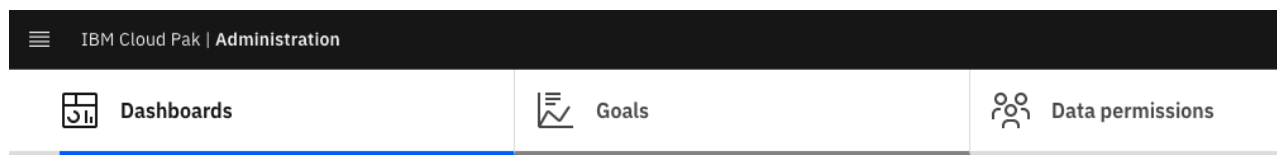
A Goal is a business statement that brings purpose and scope to your dashboards. Goals are used to aggregate charts within a dashboard and to give dashboards a business purpose. A goal's definition includes the details of a specific objective you want to achieve, the time frame for achieving an objective,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

2.2.12.1 Create a Goal

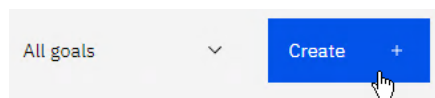
_1. Click the arrow to the left of the Client Onboarding dashboard



_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**

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



Goal specification

Goal classification (optional)

Enter category

Priority

☐ Low

☐ Medium



☒ High

Start date

☒ Now

☐ Custom

10/25/2021



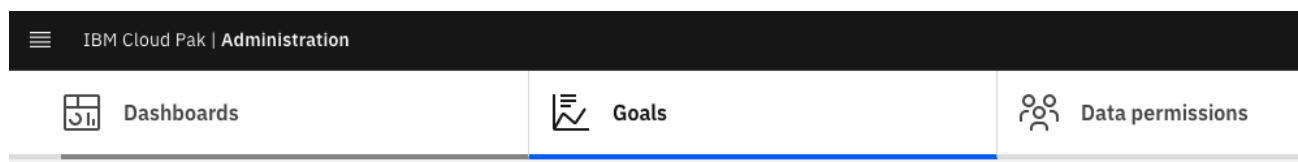
_8. Click **Save**

Cancel

Save

2.2.12.2 Set business goal for selected charts

_1. Click **Dashboards**.

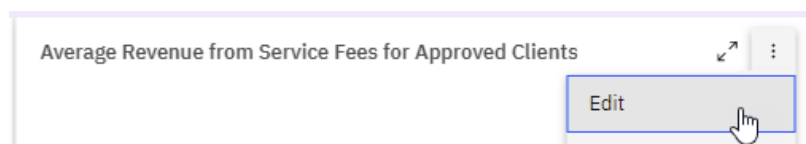


_2. Click **Client Onboarding** dashboard.

[Client Onboarding](#)

Open

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

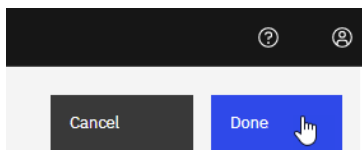


_4. For Business goal, from the dropdown list, select **Focus Corp's top Client Onboarding KPI**

Business goal

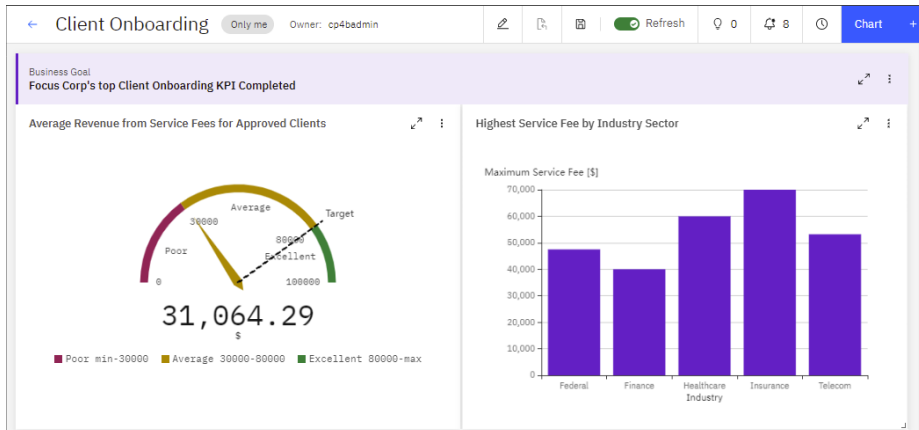
Focus Corp's top Client Onboarding KPI

_5. Click **Done**



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

The top of your dashboard should now look similar to this:

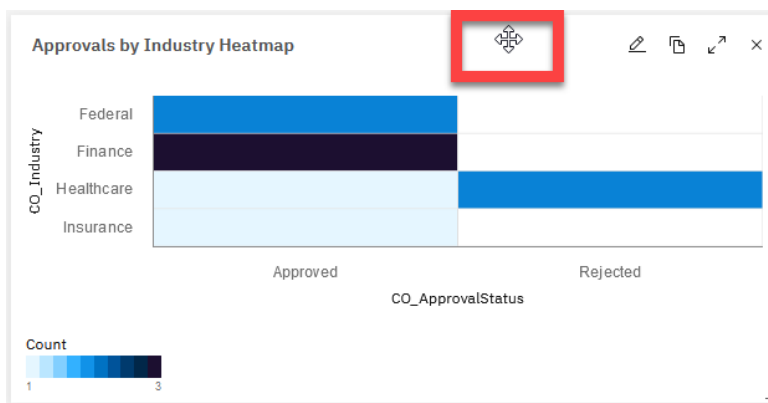


2.2.13 Change Dashboard Layout

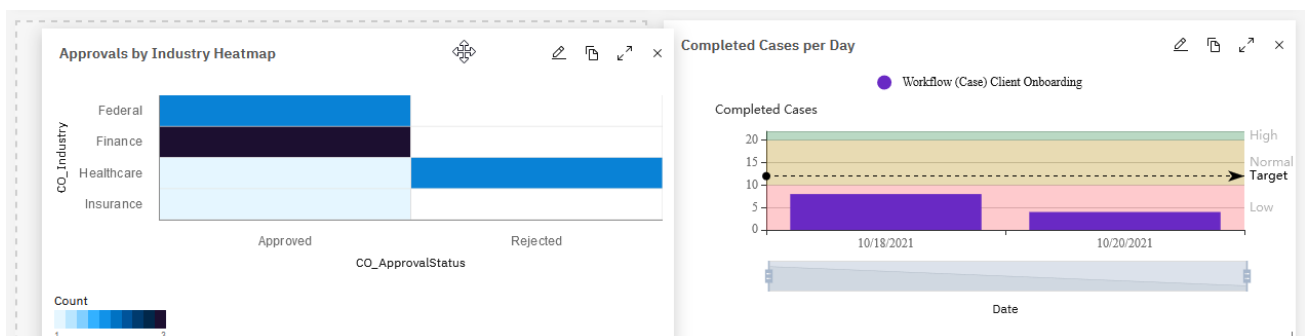
You will now customize your dashboard by moving and changing chart sizes.

2.2.13.1 Move Approvals by Industry Heatmap Chart

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

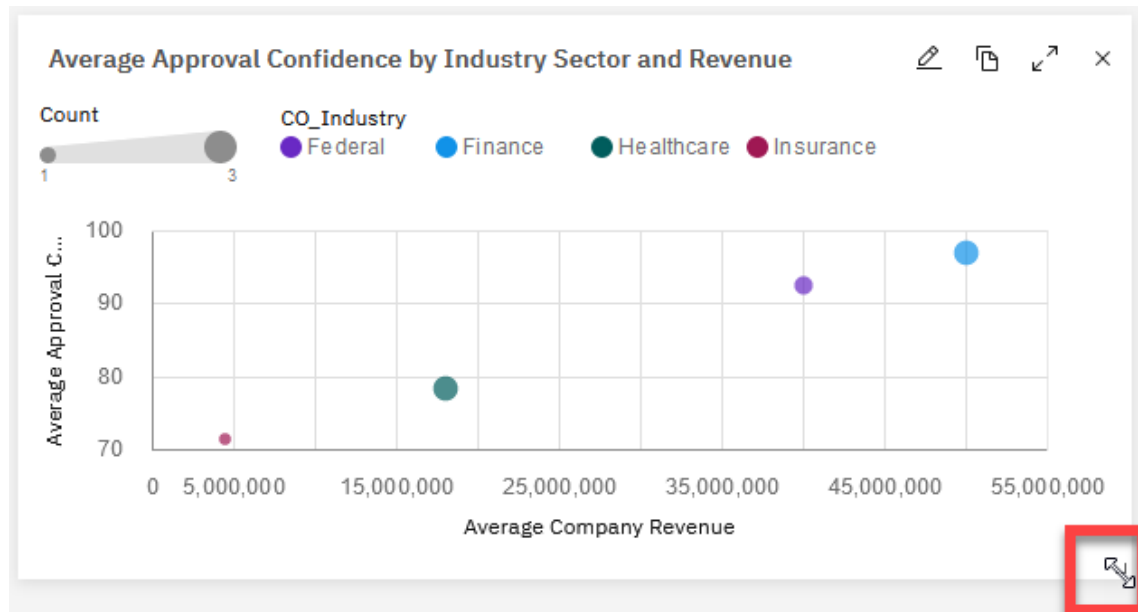


_2. Drag the chart to the empty area to the left of the Completed Cases per Day chart and release.

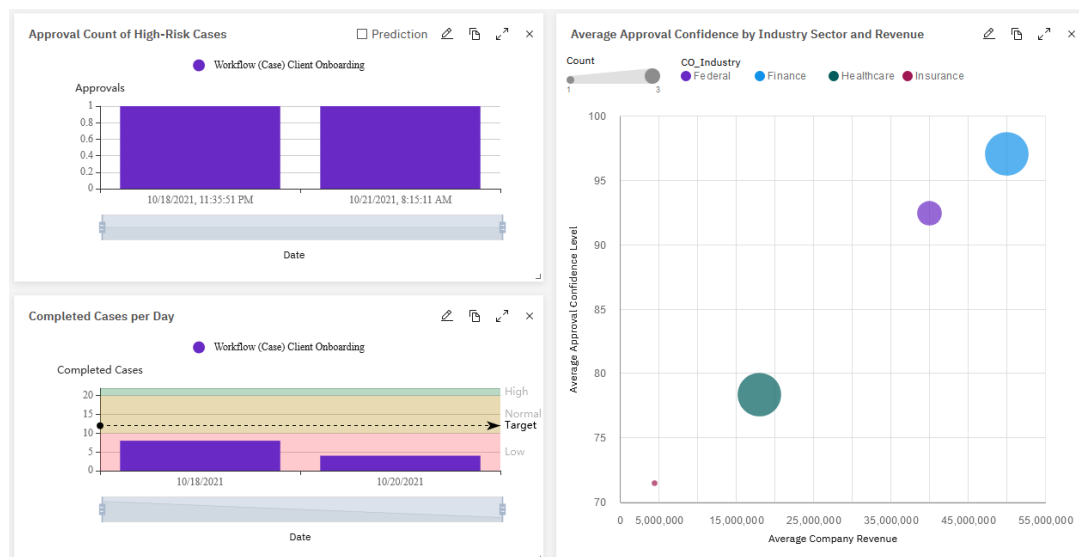


2.2.13.2 Expand chart Average Approval Confidence by Industry Sector and Revenue

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

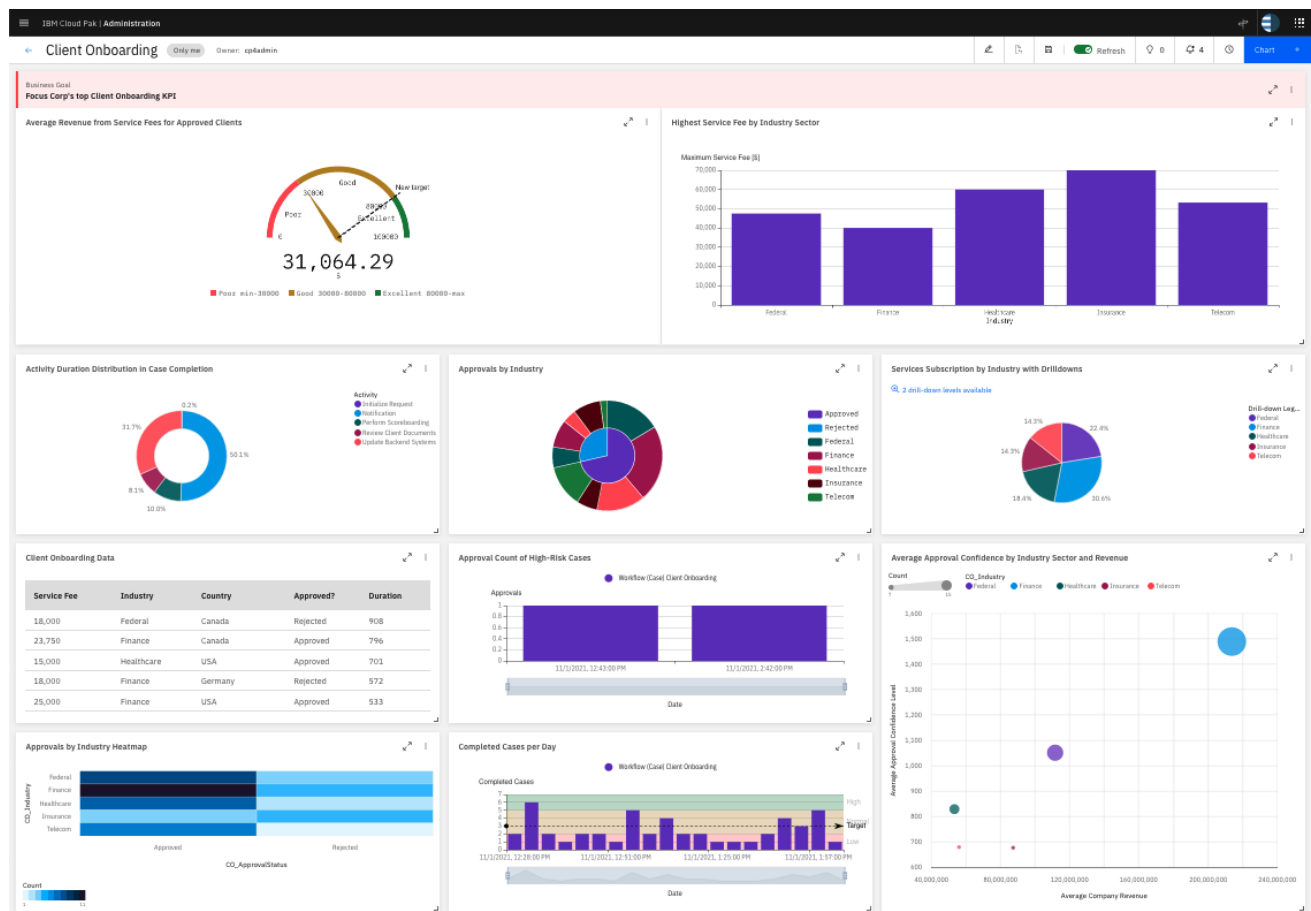


_2. Stretch the chart downwards until it achieves the height of two charts.



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

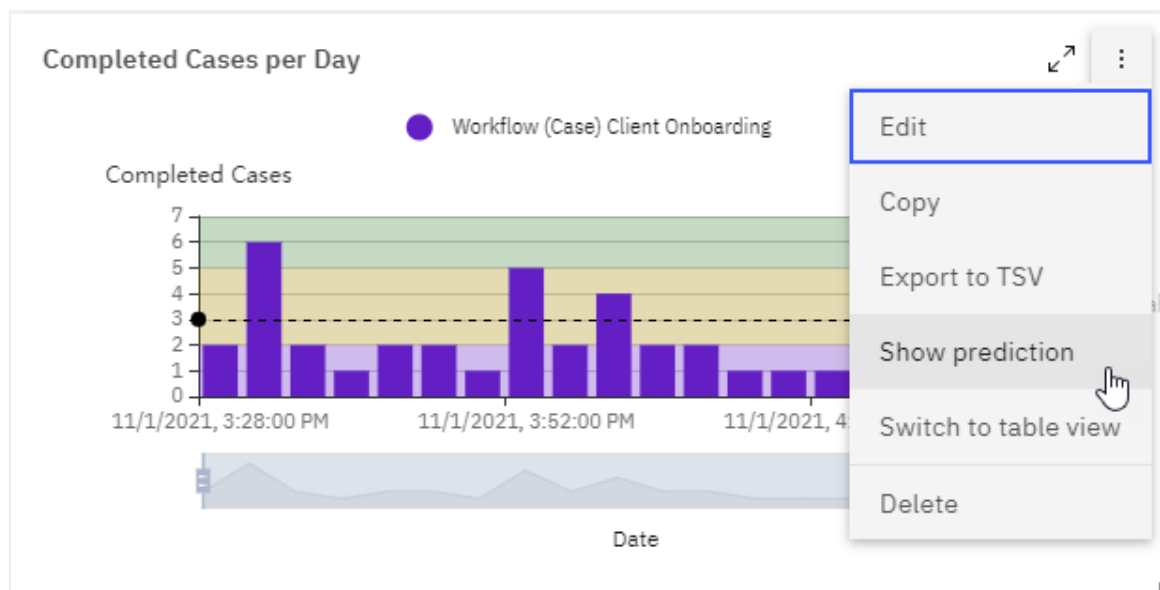
Your final version of the Client Onboarding Dashboard should now look similar to this:



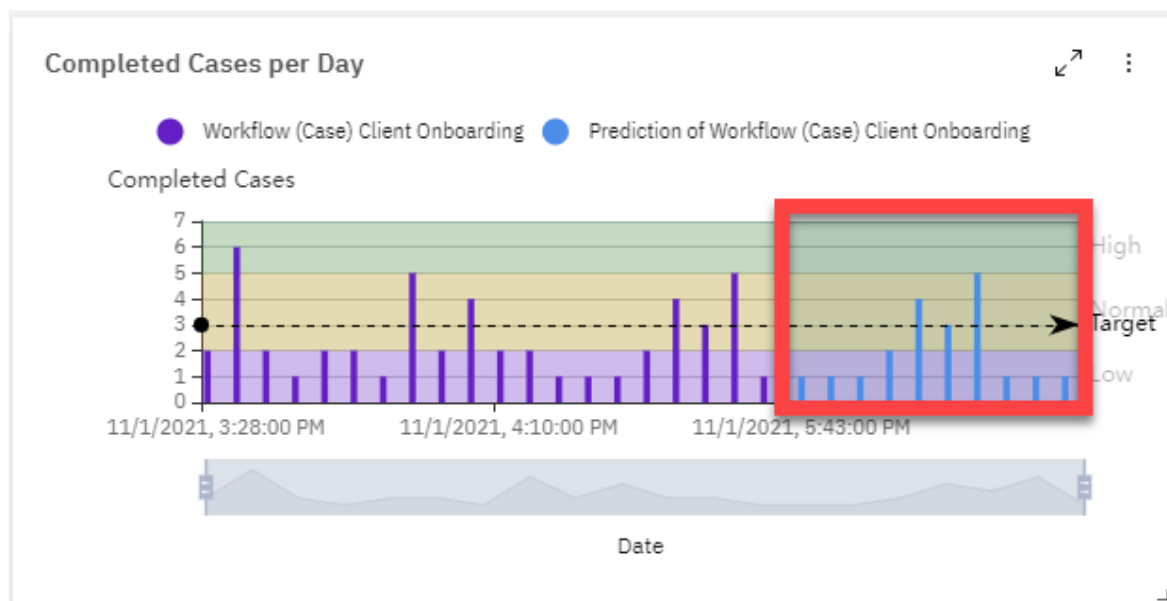
2.2.14 Explore Advanced Dashboard Features

2.2.14.1 KPI Predictions

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

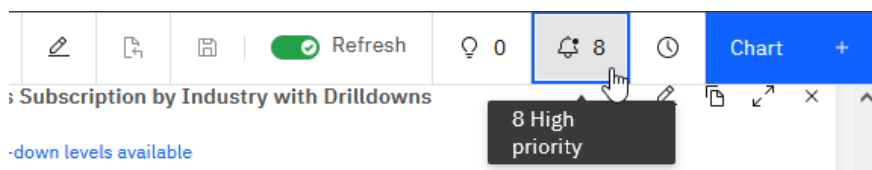


You should now see the predicted case completion rate information.

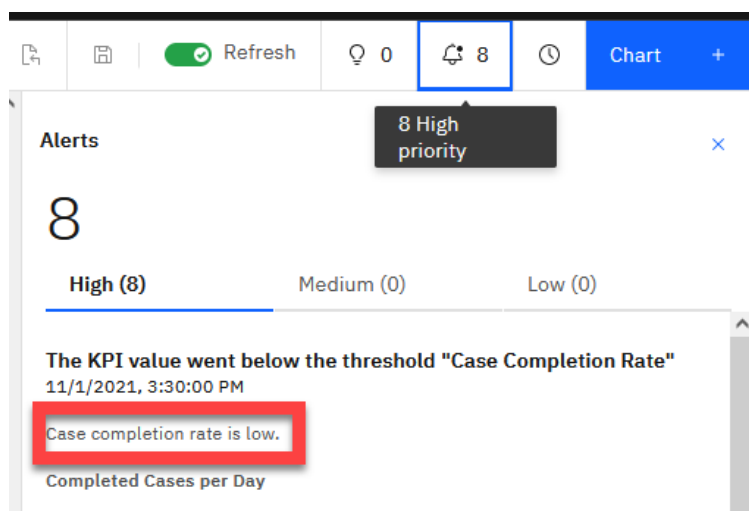


2.2.14.2 Dashboard Alerts

_1. Click the **Alert** icon in the toolbar above the dashboard.



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 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

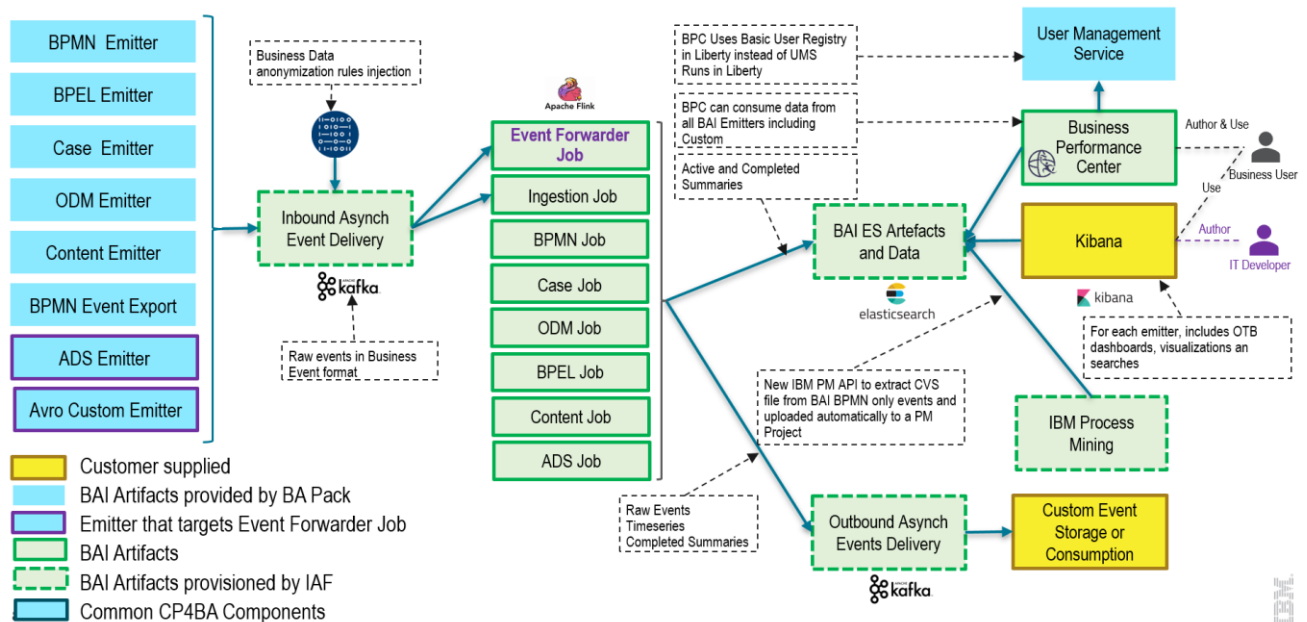


Figure 2. IBM Business Automation Insights Architecture – Full Detail

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>