IBM Cloud Pak for Business Automation Demos and Labs

Operational Intelligence

IBM Business Automation Insights

Build Business Performance Center Dashboard

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CP4BA 25.0.0

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1 Lab Introduction

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

1.1 Introduction to IBM Business Automation Insights

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

See a high-level BAI architecture in the figure below. Additional presentation materials: BAI: https://ibm.box.com/v/IBM-BAI-Tech-Intro, BPC: https://ibm.box.com/v/BusinessPerformanceCenter

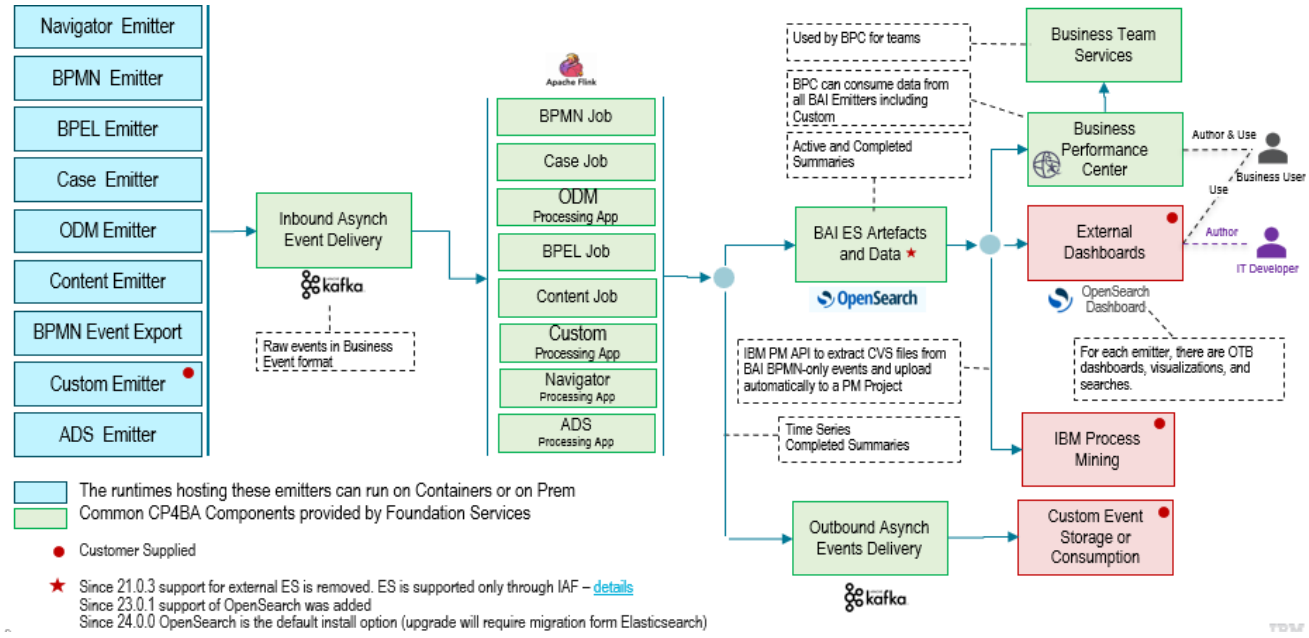


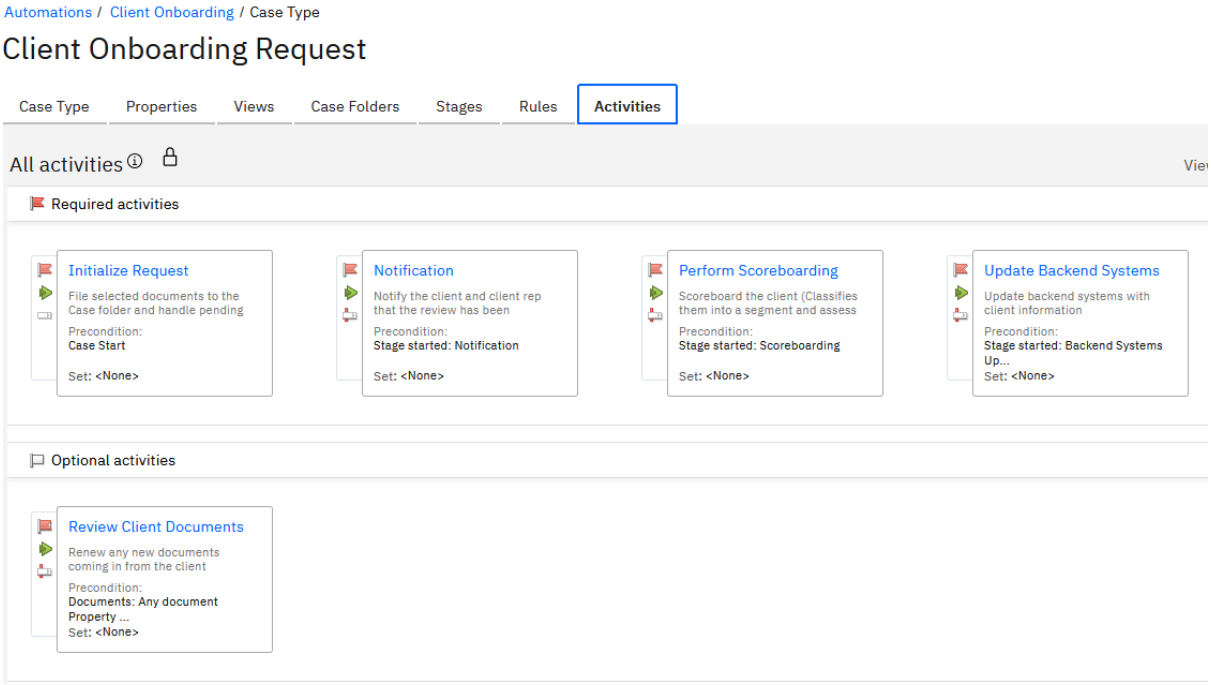
Figure 1. IBM Business Automation Insights Architecture

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:

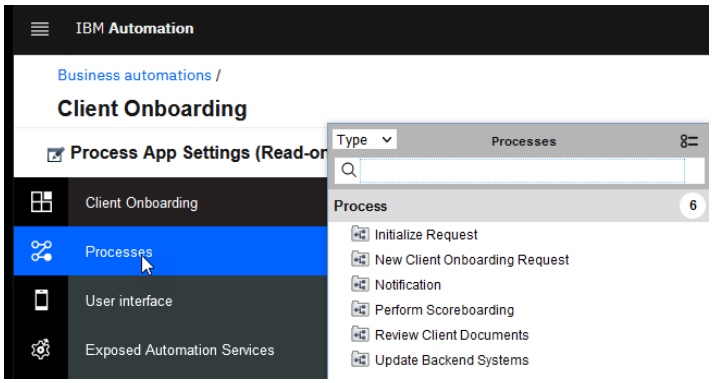
- Design and share dashboards in minutes that capture business data in near real-time, providing awareness of essential business activities and processes.
- Prepare, track, and design visualizations of metrics, key performance indicators (KPIs), and other business performance measurements in customizable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

1.2 Lab Overview

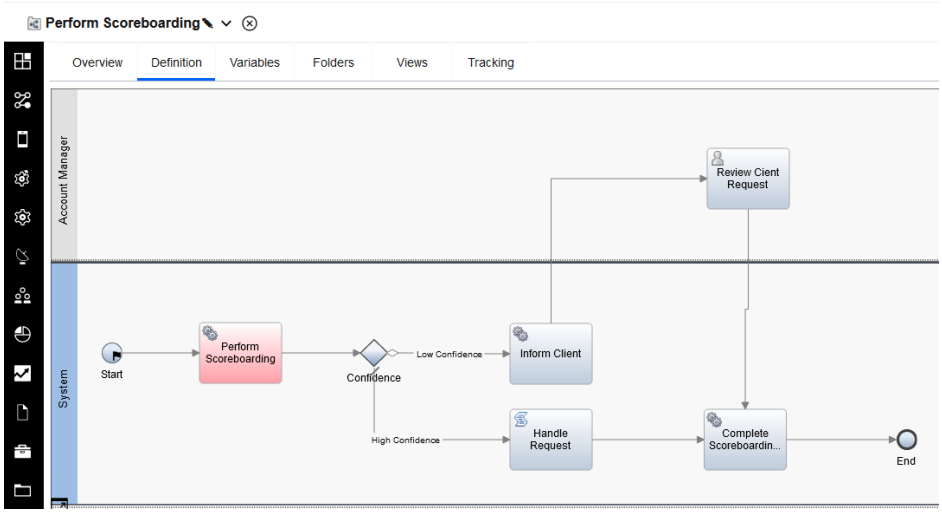
The solution used during the labs is the *Client Onboarding* workflow automation, implemented as a Case with several BPMN processes that implement case activities. The automation contains a single Case Type, Client Onboarding Request, which includes activities, data, documents, and conditions that drive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



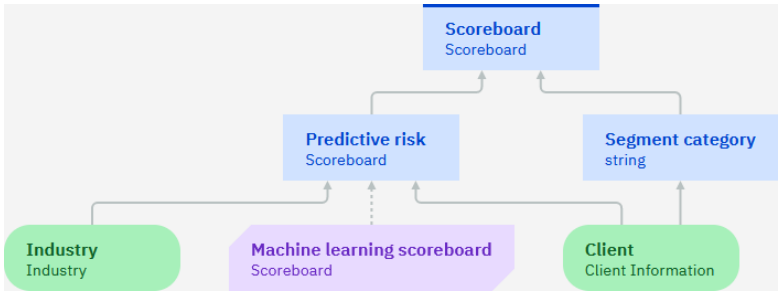
BPMN processes (shown below) implement all five Case Activities above in an automatically generated Process App (Client Onboarding).



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



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



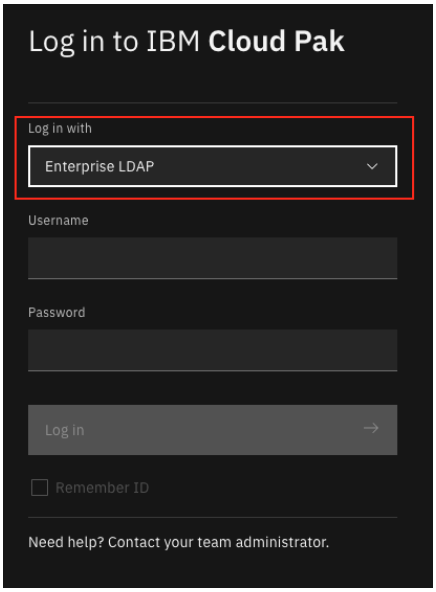
When authoring one of the Charts on the Dashboard, you will use data generated by the above decision.

1.3 Lab Setup Instructions

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

_1. Paste the **Business Performance Center** URL into your web browser

_2. For *Log in with,* select **Enterprise LDAP**, enter the *Username* and *Password* supplied to you, and then click **Log in**

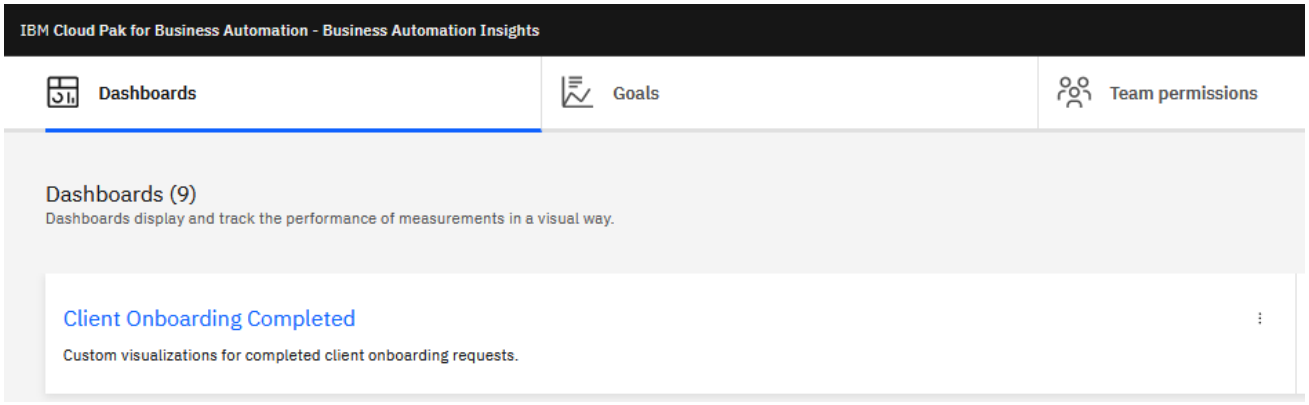


2 Exercise: Create a Client Onboarding Workflow Dashboard

2.1 Introduction

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

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



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

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

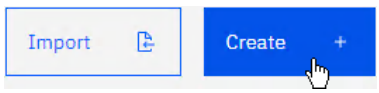
2.2 Exercise Instructions

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

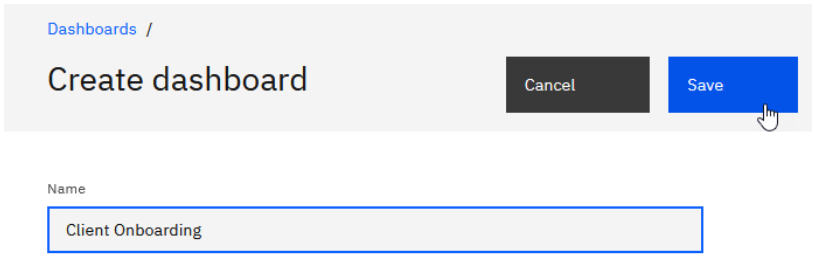
- Client Onboarding **Dashboard**
- **Charts** used in the Client Onboarding dashboard
- A chart **Alert**
- A **Goal** to aggregate related charts

2.2.1 Create a Dashboard

_1. Click **Create +**



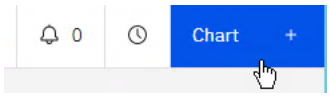
_2. For *Name,* enter **Client Onboarding** and click **Save.**



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

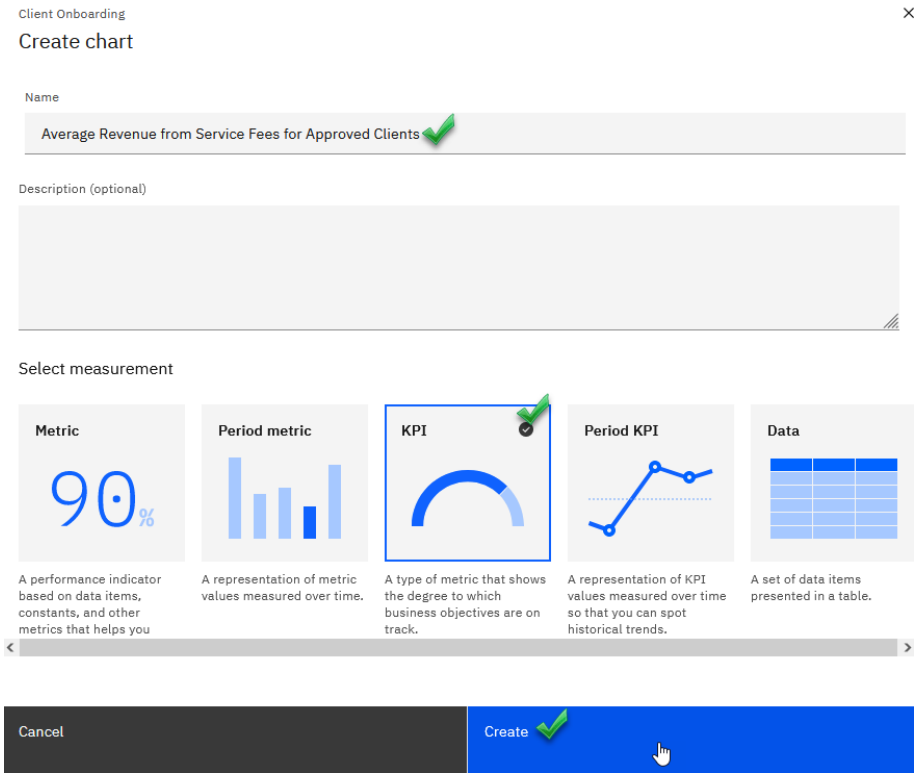
This gauge chart will show the average revenue from service fees for approved clients.

_1. Click **chart +**



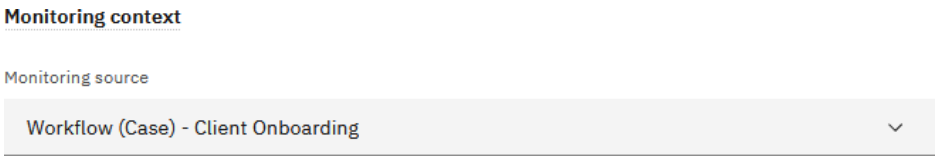
_2. Enter the following and then click **Create**

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



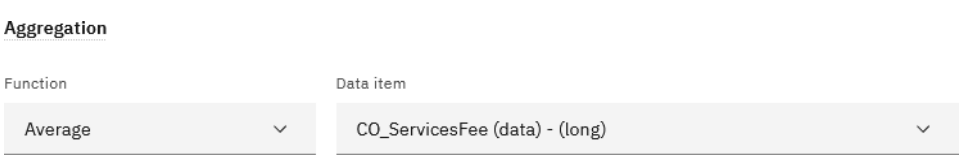
2.2.2.1 Define Monitoring Information

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



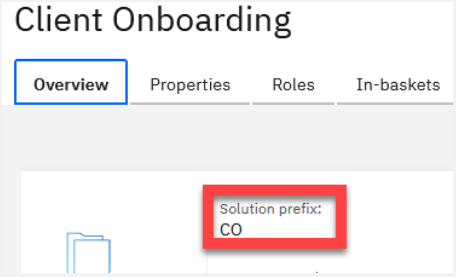
This monitoring source will select events from the Client Onboarding workflow.

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

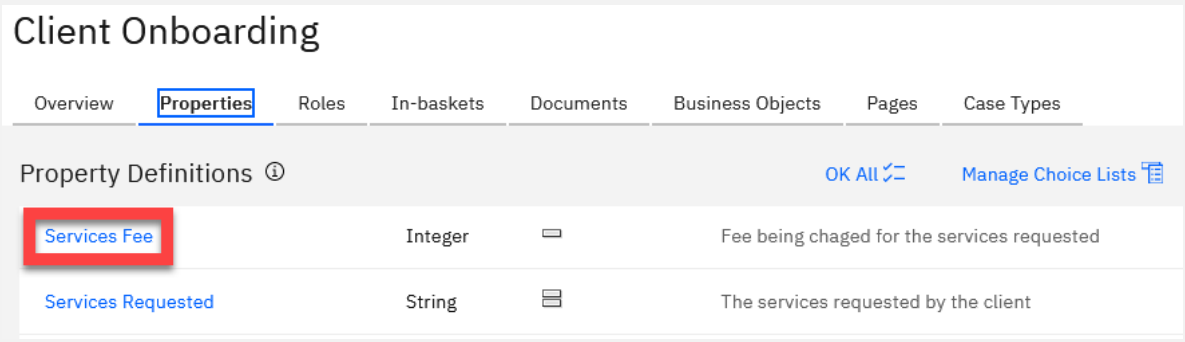


If you are wondering where this case property comes from, read the explanation below.

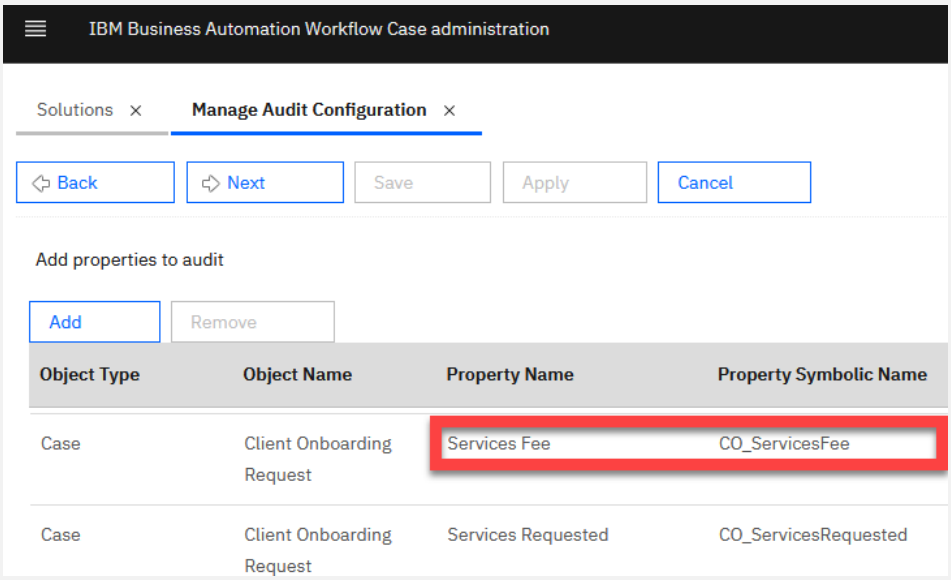
The CO prefix in CO_ServicesFee is the Client Onboarding Solution prefix.



ServicesFee in CO_ServciesFee is the name of the Client Onboarding case property.

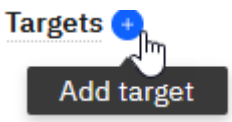


For the BAI Case Emitter to add this property to the emitted events, the Client Onboarding Audit Configuration includes this property.

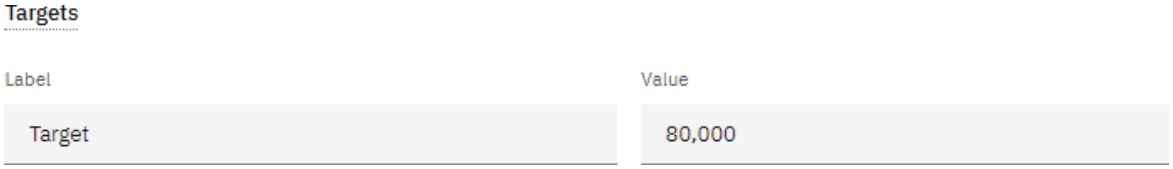


Let's continue with the lab instructions.

_3. Click **Targets +**



_4. For *Label*, enter **Target**, and for *Value,* enter **80000.**

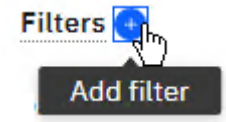


2.2.2.2 Define Filter Data

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

_1. Select the **Filters** tab.

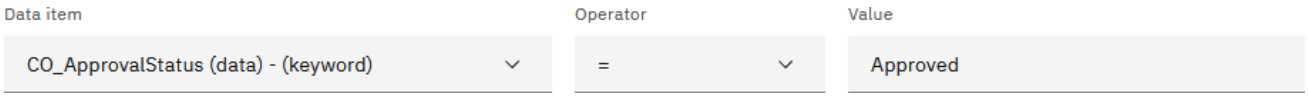
_2. Click the **Filter +** button.



_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:



2.2.2.3 Define Visualization

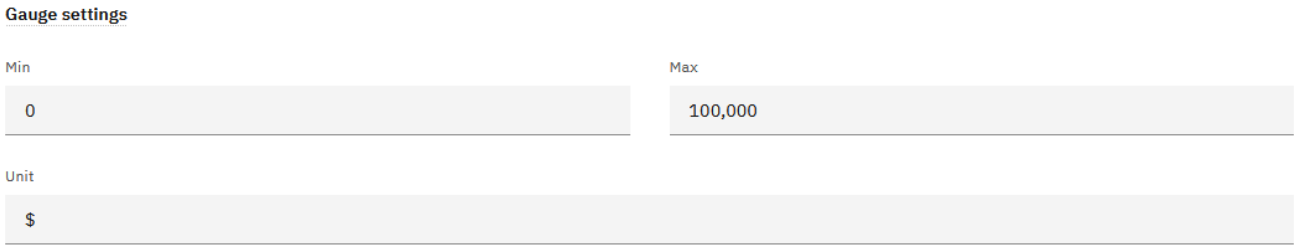
This setting allows you to customize your Chart display settings.

_1. Select the **Visualization** tab.

_2. Enter the following values:

Item	Value
Min	0
Max	100,000
Unit	$

Your Gauge setting should look exactly like this:



2.2.2.4 Define Thresholds

This setting allows you to customize the Gauge threshold setting.

_1. Select the **Thresholds** tab.

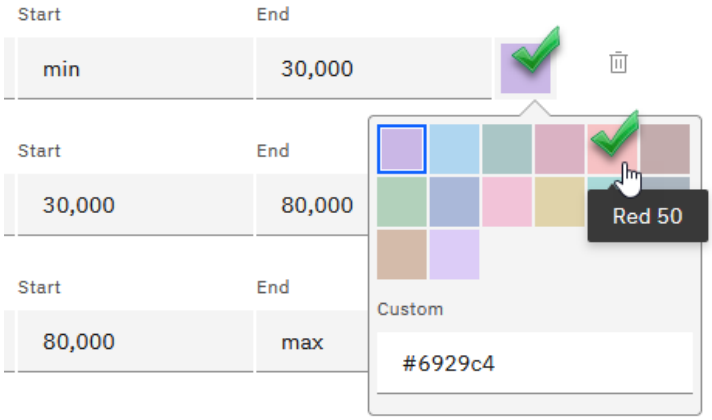
_2. Click the **Thresholds +** button **two times.**

_3. For each Group, enter the following values:

s	Data item	Value
1	Threshold name	Below
	End	30000
	Range name 1	Poor
	Range name 2	Average
2	Threshold name	Above
	End	80000
	Range name 3	Excellent

Your Thresholds setting should look exactly like this:

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

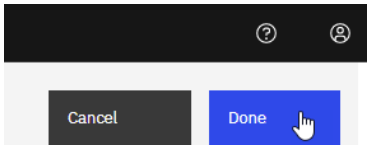


_5. Using the above steps, customize the other two colors.

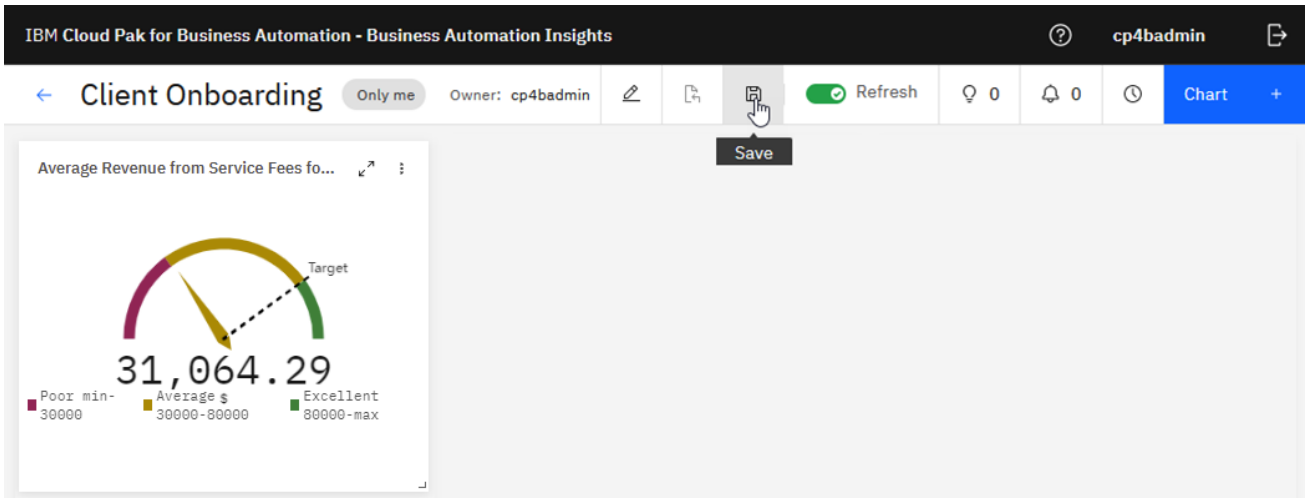
Item	Value
80,000	Yellow
max	Green

The color settings should look exactly like this:

_6. Click **Done.**



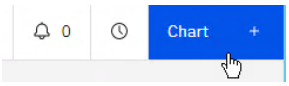
_7. Click the **Save icon** on the toolbar above the Dashboard to save your work!



2.2.3 Create "Approvals by Industry" Chart

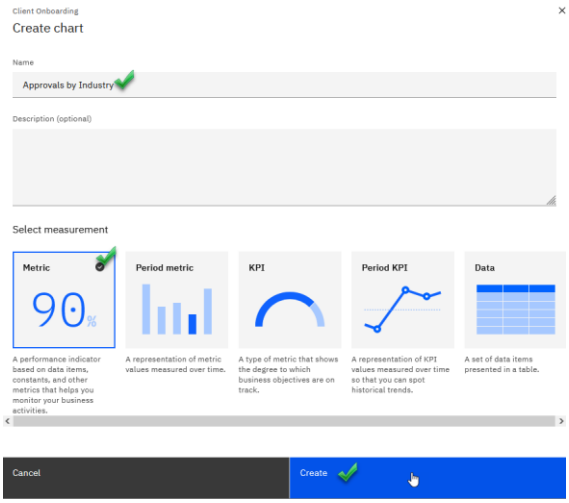
This hierarchical pie chart will show approvals (Approved, Rejected, Under Review) per industry.

_1. Click **Chart +**



_1. Enter the following and then click **Create.**

Item	Value
Name	Approvals by Industry
Select measurement	Metric



2.2.3.1 Define Monitoring Information

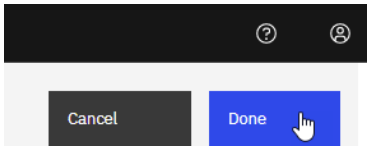
_1. For *Monitoring source,* select **Workflow (Case) – Client Onboarding**

_2. Click the **Group by +** button **twice.**

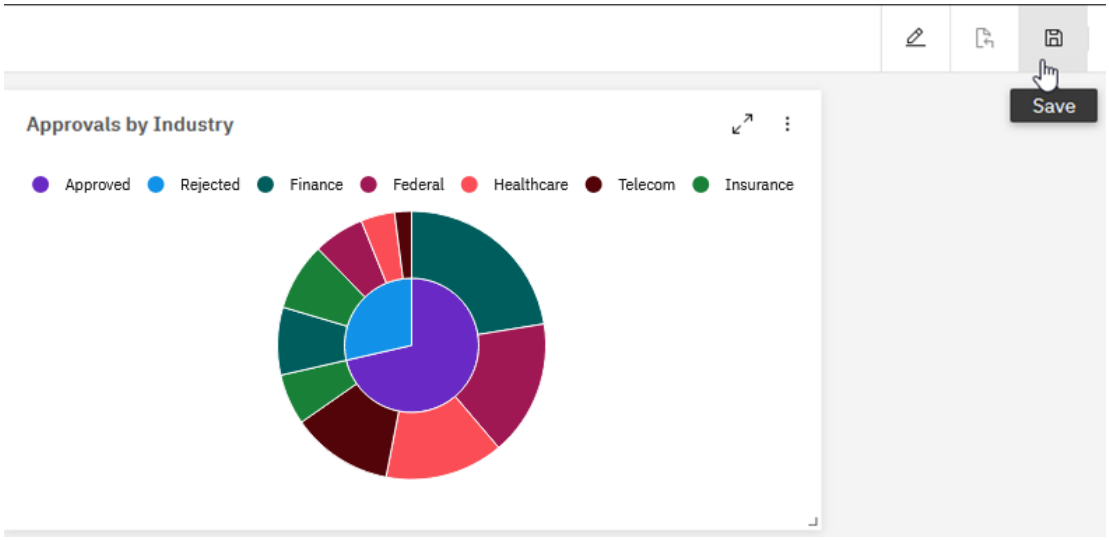
_3. Enter the following values for the *Group by* entries:

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

_4. Click **Done.**



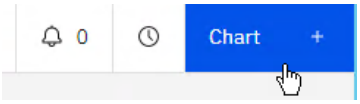
_5. Click the **Save** icon on the toolbar above the Dashboard to save your work!



2.2.4 Create "Services Subscription by Industry with Drilldowns" Chart

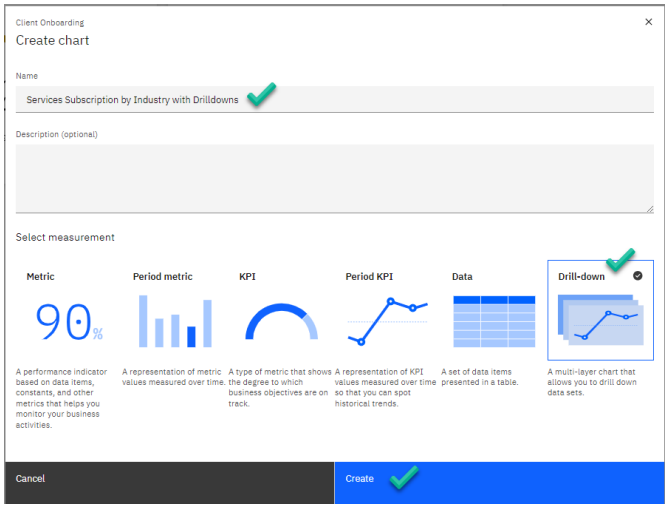
This pie chart will show the service subscriptions by industry. Another feature of this chart is drilling down by service > industry > country.

_1. Click **Chart +**



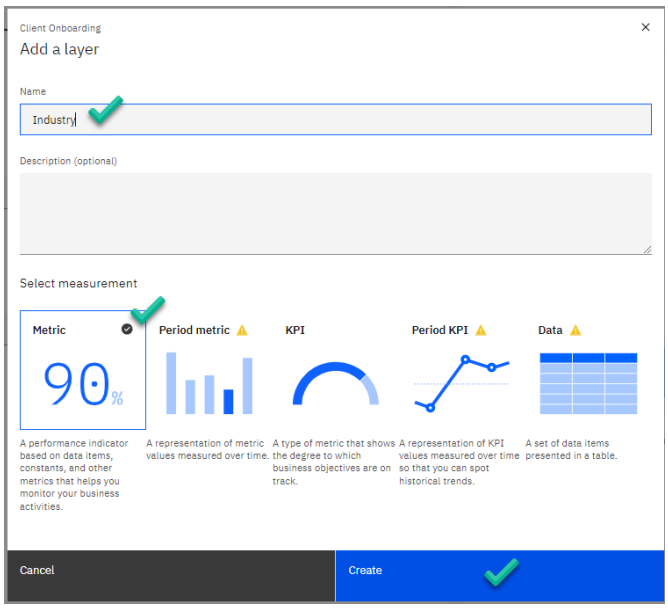
_2. Enter the following and then click **Create**

Item	Value
Name	Services Subscription by Industry with Drilldowns
Select measurement	Drill-down

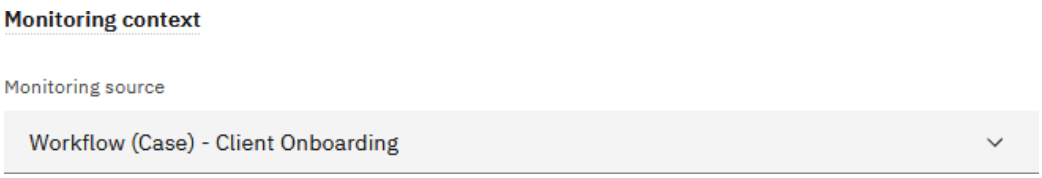


_3. Enter the following and then click **Create.**

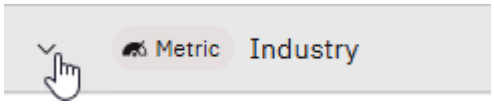
Item	Value
Name	Industry
Select measurement	Metric



_4. For the *Monitoring source,* select **Workflow (Case) – Client Onboarding.**

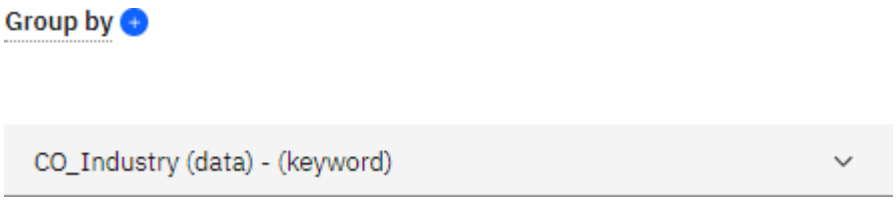


_5. Click the **dropdown** on the Industry layer.

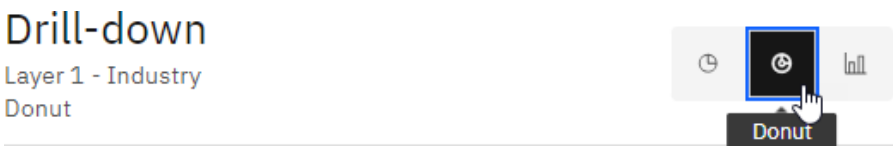


_6. Click **Group by +**

_7. For Group by select **CO_Industry.**



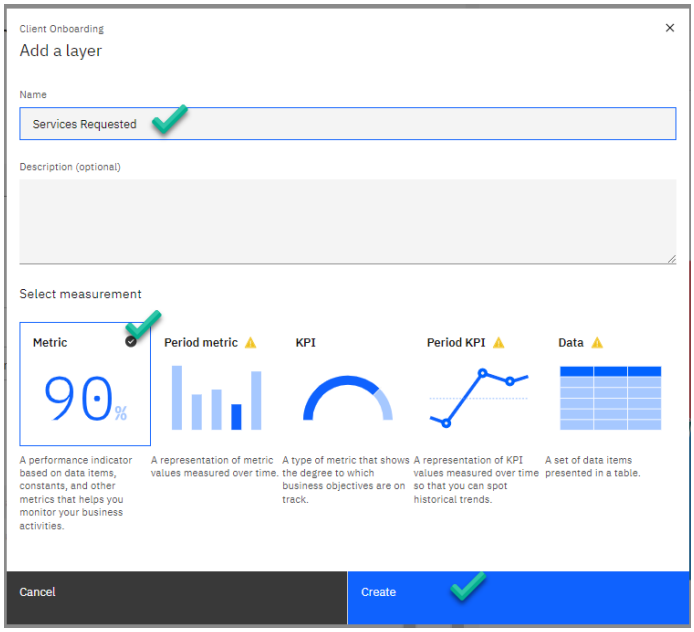
_8. For the Drill-down chart type, select **Donut.**



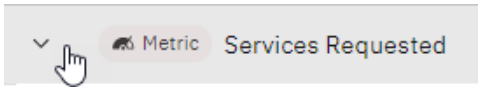
_9. Click **Add a layer.**

_10. Enter the following and then click **Create.**

Item	Value
Name	Services Requested
Select measurement	Metric

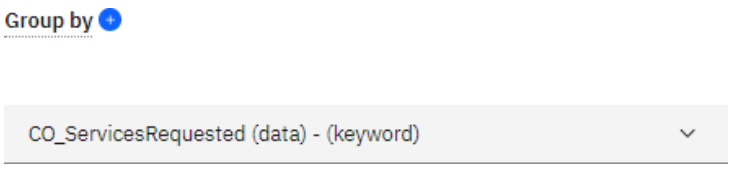


_11. Click the **dropdown** on the Service Requested layer.

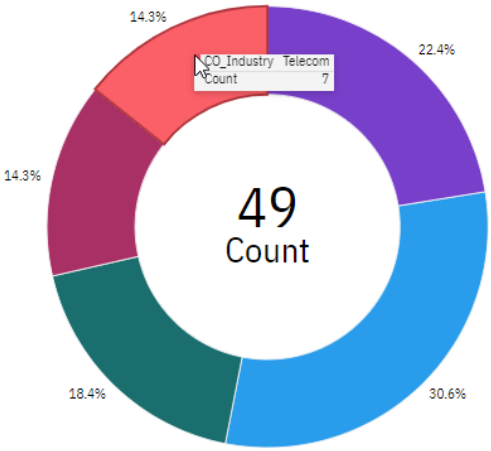


_12. **Group by +**

_13. For *Group by,* select **CO_ServicesRequested.**



_14. On the Donut, click any wedge to unlock the second data layer.

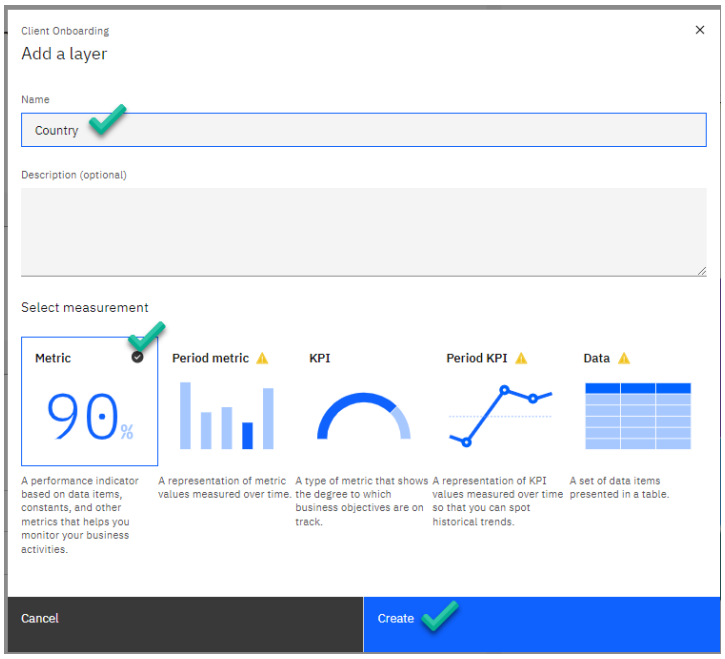


_15. For the Drill-down chart type, select **Donut.**

_16. Click **Add a layer**

_17. Enter the following and then click **Create**

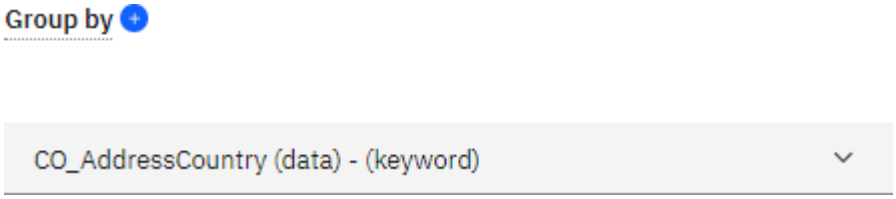
Item	Value
Name	Country
Select measurement	Metric



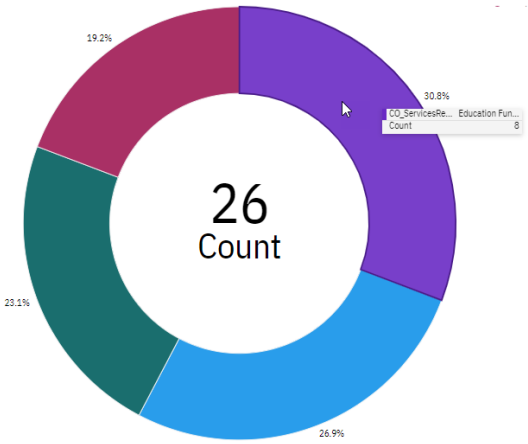
_18. Click the **dropdown** on the Country layer.

_19. **Group by +**

_20. For Group by select **CO_AddressCountry.**

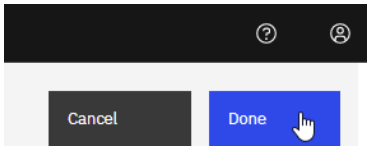


_21. On the Donut, click any wedge to unlock the second data layer.

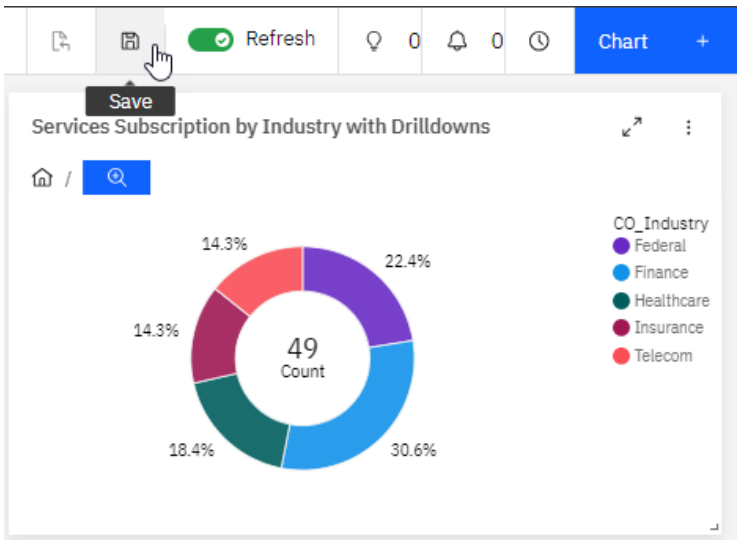


_22. For the Drill-down chart type, select **Donut.**

_23. Click **Done.**

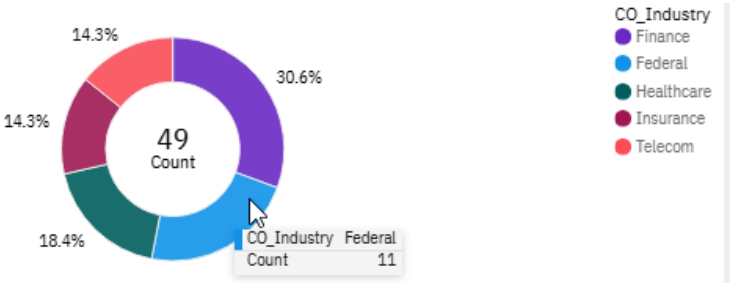


_24. Click the **Save icon** on the toolbar above the Dashboard to save your work!

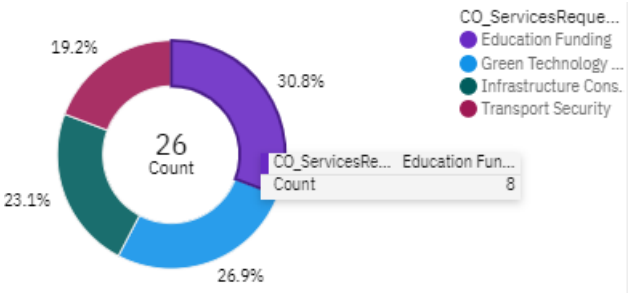


2.2.4.1 Explore the Drill-down Capability

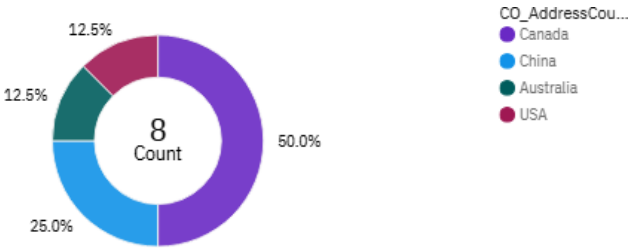
_1. Select the first drill-down level by clicking on **Federal** Industry (the color may differ for you).



_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.*

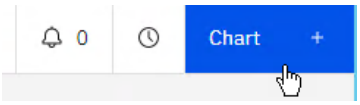


_4. Click **Home** to get back to the original view.

2.2.5 Create "Highest Service Fee by Industry Sector" Chart

This bar chart will show the highest service fees for the industry sector.

_1. Click **chart +**



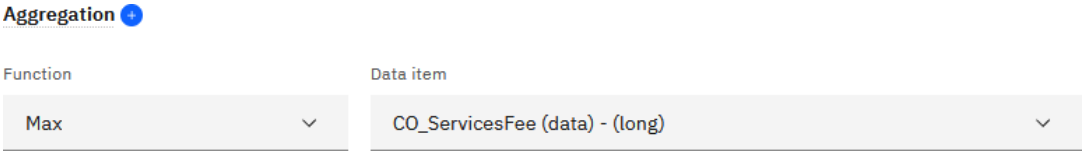
_2. Enter the following and then click **Create**

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

2.2.5.1 Define Monitoring Information

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

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



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

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

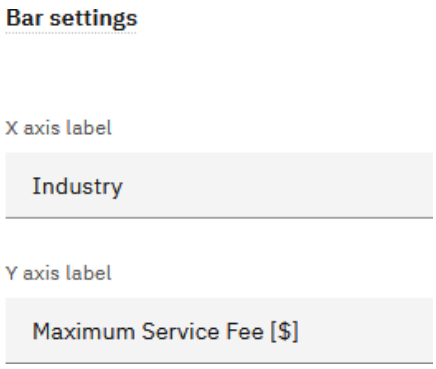
_5. For chart type, select **Bar.**

2.2.5.2 Define Visualization Information

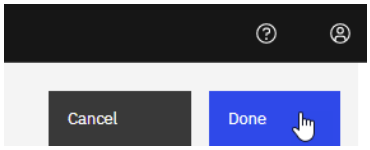
_1. Click the **Visualization** tab.

_2. For *Bar settings*, enter:

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

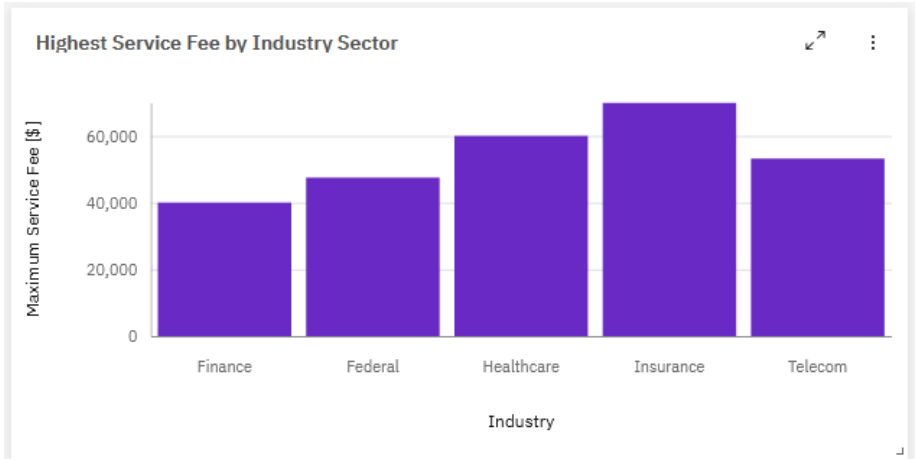


_3. Click **Done**



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

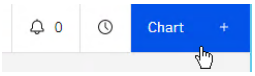
Your chart should look similar to this (the order of the industries may be different for you):



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

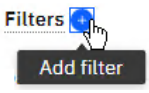
_2. On *Interval,* change the setting to **Minutes(s)**

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

2.2.6.2 Define Filters and Predictions

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

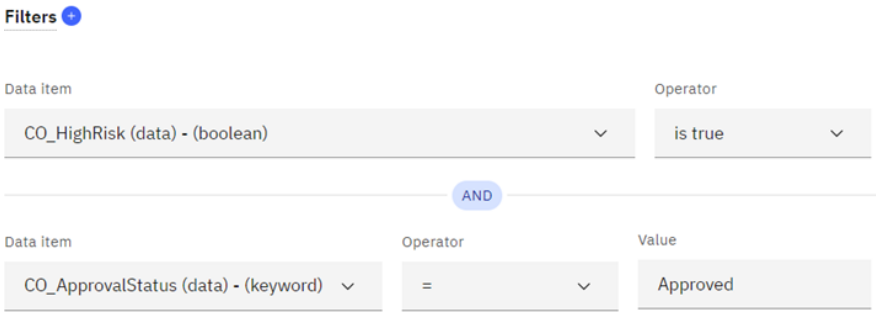
_2. Click the **Filter +** button **twice** to add two filters.



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

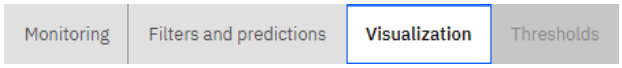
Group	Data item	Operator	Value
1	CO_HighRisk (data) – (boolean)	Is true	N/A
2	CO_ApprovalStatus (data) – (keyword)	=	Approved

Your Filters setting should look exactly like this:



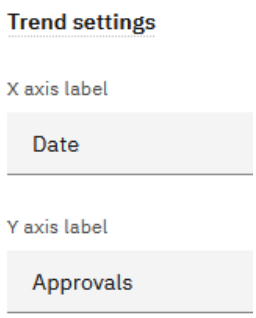
2.2.6.3 Define Visualization Information

_1. Click the **Visualization** tab.

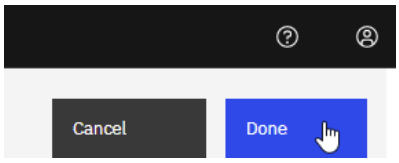


_2. For *Bar settings*, enter:

Item	Value
X axis label	Date
Y axis label	Approvals

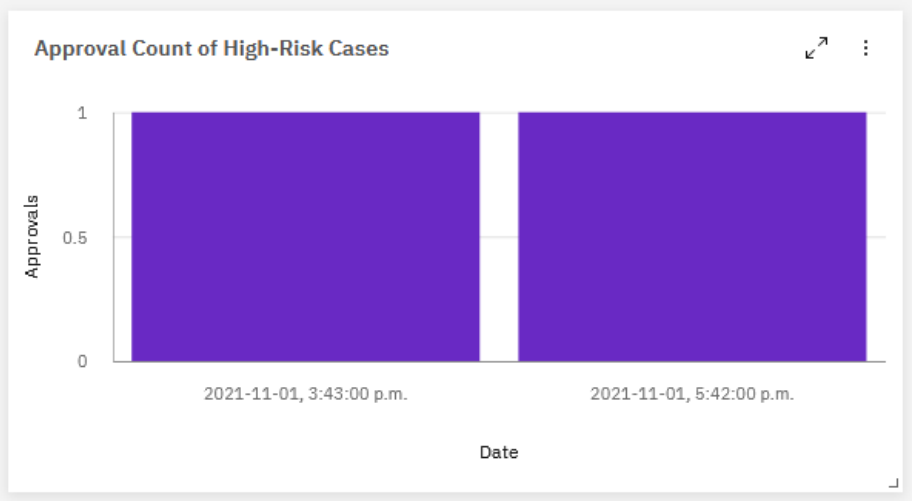


_3. Click **Done.**



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

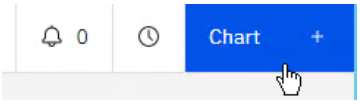
Your chart should look similar to this.



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 an X-axis as the average revenue and a Y-axis as the average approval confidence level.

_1. Click **Chart +**



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

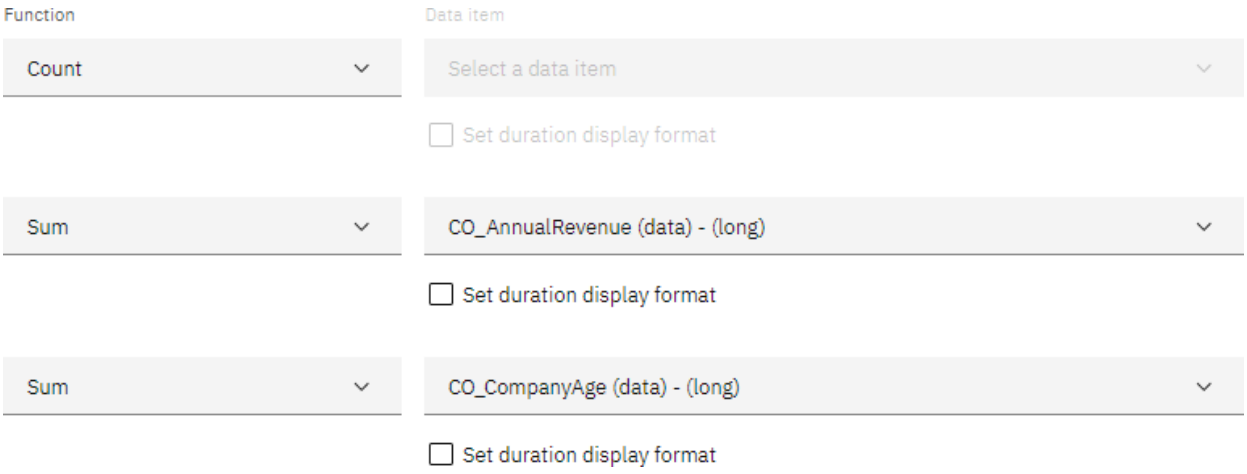
Item	Value
Name	Average Approval Confidence by Industry Sector and Revenue
Select measurement	Metric

2.2.7.1 Define Monitoring Information

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

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

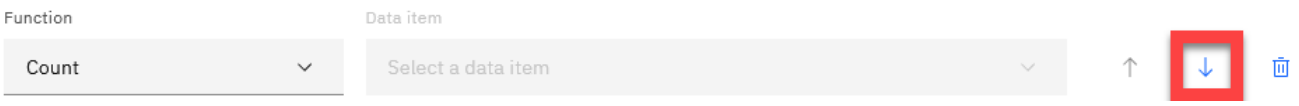
Note that two Aggregations were added below the Count.



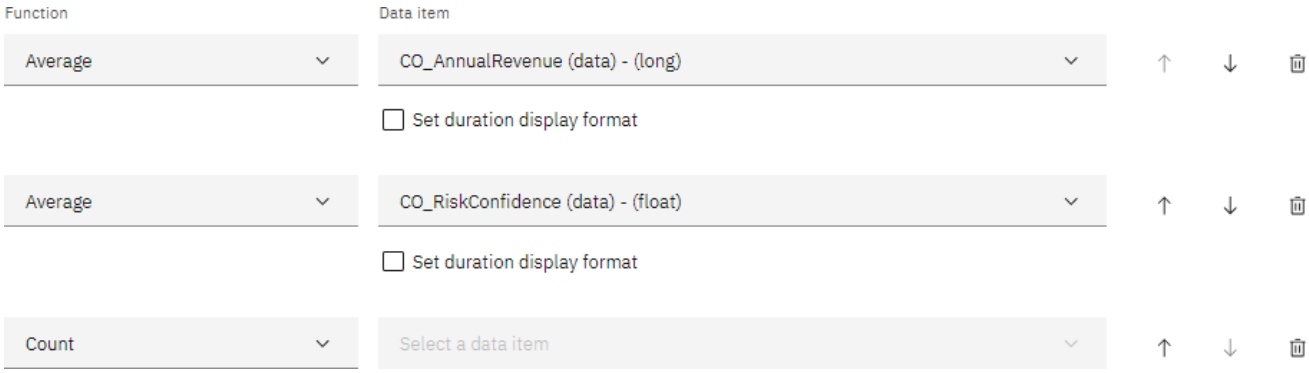
_3. For the two new aggregations, select the following values from the dropdown list:

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

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



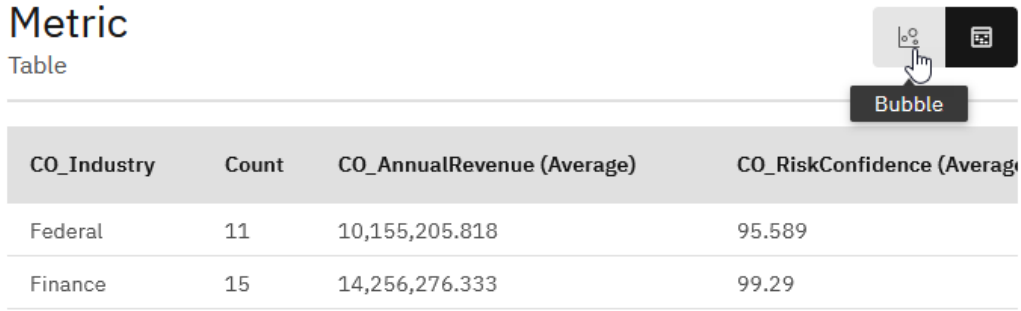
Your aggregations setting should look exactly like this:



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

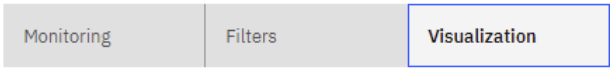
_6. Select **CO_Industry (data) – (keyword).**

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



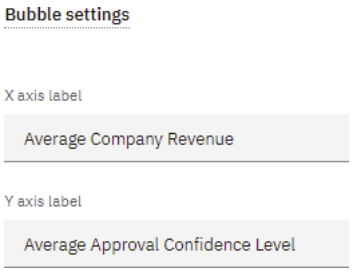
2.2.7.2 Define Visualization Information

_1. Click the **Visualization** tab.

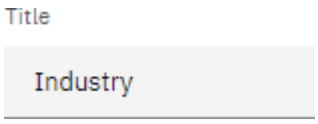


_2. For Bubble settings, enter:

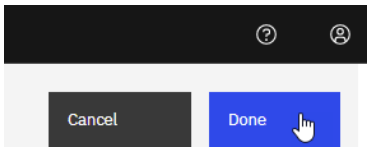
Item	Value
X axis label	Average Company Revenue
Y axis label	Average Approval Confidence Level



_3. For *Title,* enter **Industry.**

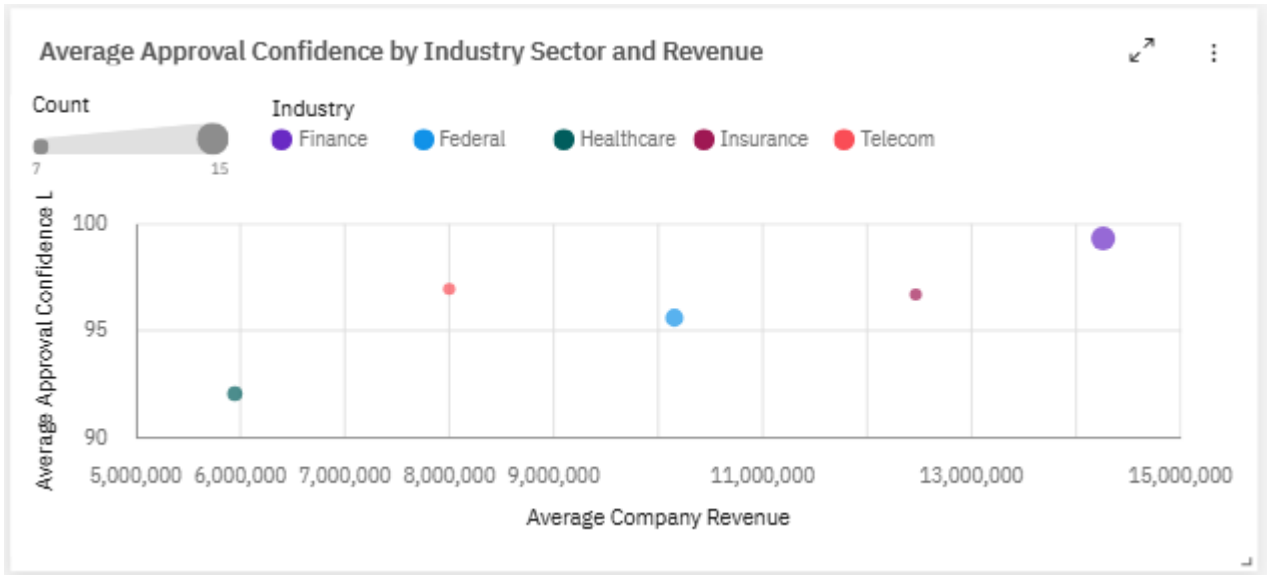


_4. Click **Done.**



_5. On the toolbar above the Dashboard, click the **Save** icon to save your work!

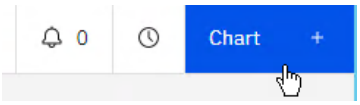
Your chart should look similar to this.



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

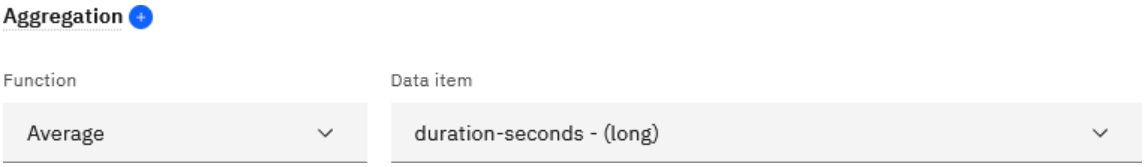
_1. For *Monitoring source,* select **Workflow (Case) – Client Onboarding**

_2. Click the **Group by +** button.

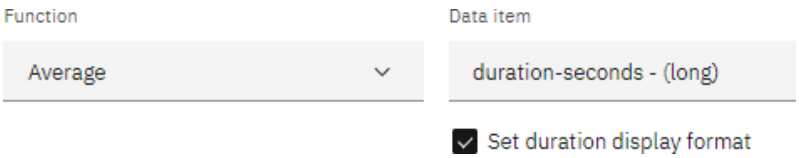
_3. Select **task-name – (keyword)**

_4. Set visualization type to **Donut.**

_5. Change the Aggregation values by setting *Function* to **Average** and *Data item* to **duration-seconds – (long)**



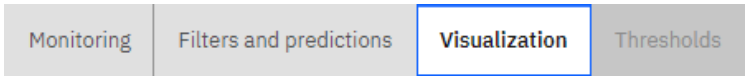
_6. Select **Set duration display format.**



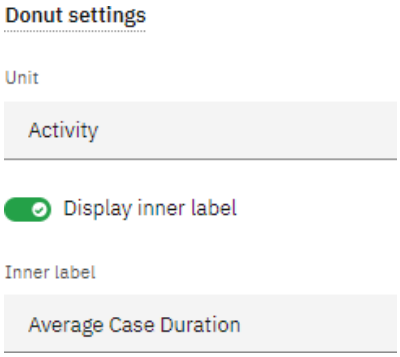
_7. For the *Output (display) unit,* select **Minute.**

2.2.8.2 Define Visualization Information

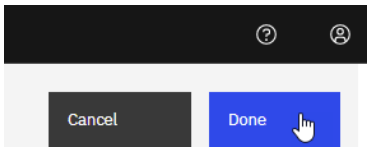
_1. Click the **Visualization** tab.



_2. For *Donut settings,* set *Unit* to **Activity** and *Inner label* to **Average Case Duration.**

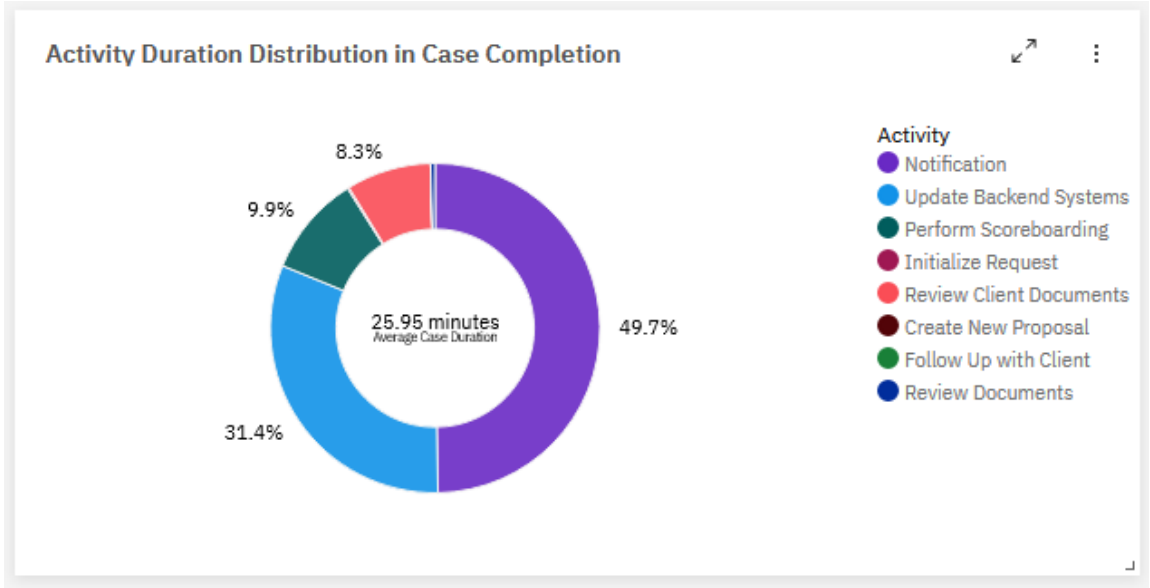


_3. Click **Done.**



_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.

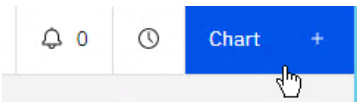
Note that the title states "per Day," but given the data set used for this lab, the scale is "per Minute."

This chart will also include two advanced features:

- **Predictions** – predict the number of cases completed in the future using one of the following algorithms. This is a valuable tool for enabling human resource capacity planning.
- **Alerts** – provide visual indications when the number of cases completed falls below 2 in a given time period.

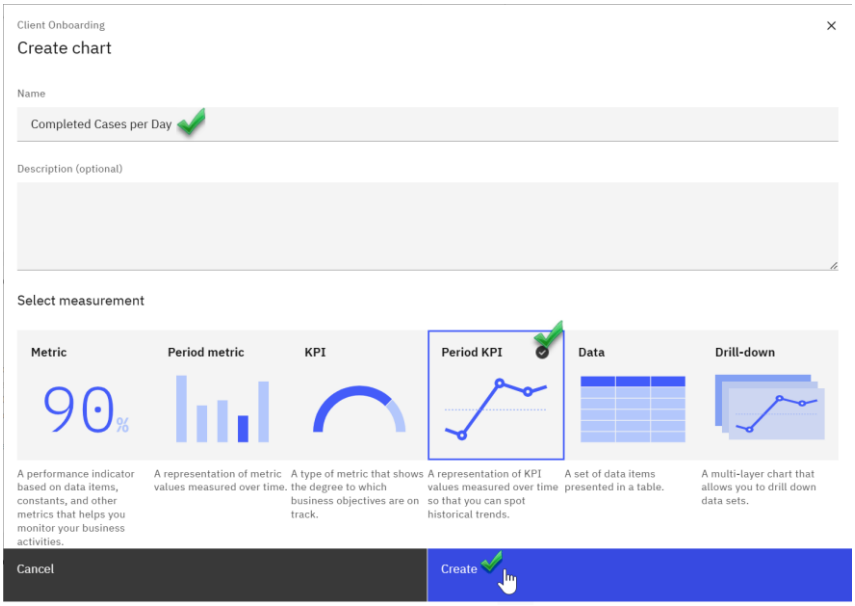
Note that depending on the data, KPI Predictions use one of the following algorithms: ARIMA, Seasonal ARIMA, or Exponential Smoothing.

_1. Click **Chart +**



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

Item	Value
Name	Completed Cases per Day
Select measurement	Period KPI



2.2.9.1 Define Monitoring Information

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

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

_3. Click the **Targets +** button.

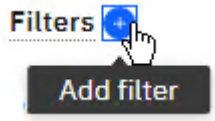
_4. For *Label,* enter **Target,** and for *Value,* enter **3.**

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

2.2.9.2 Define Filters

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

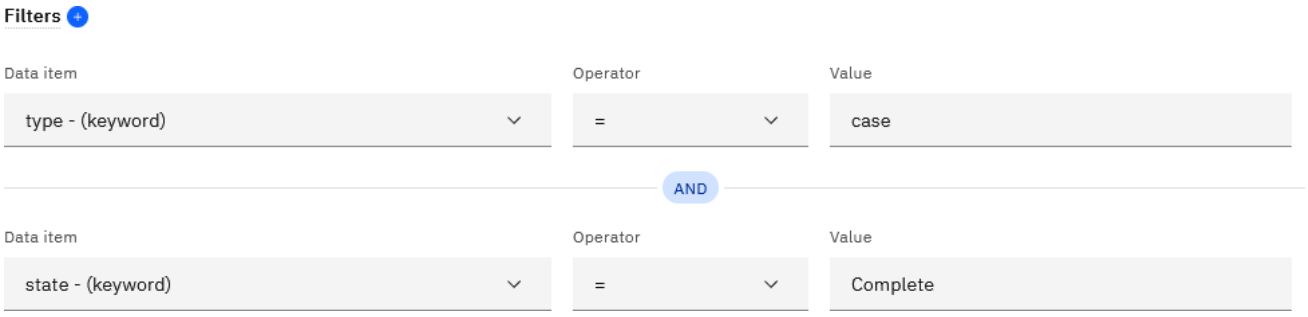
_2. Click the **Filter +** button **twice** to add two filters.



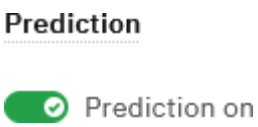
_3. Select the following values for each Filter:

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

Your Filter setting should look exactly like this:

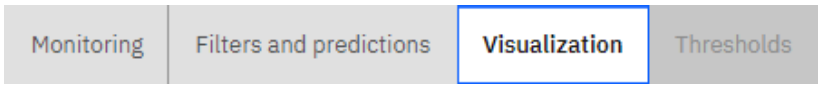


_4. Under **Prediction**, enable the slider to turn them on.



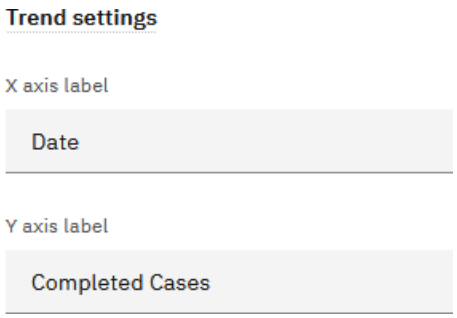
2.2.9.3 Define Visualization Information

_1. Click the **Visualization** tab.



_1. For Trend settings, enter:

Item	Value
X axis label	Date
Y axis label	Completed Cases



2.2.9.4 Define Thresholds

This setting allows you to customize the Gage threshold setting.

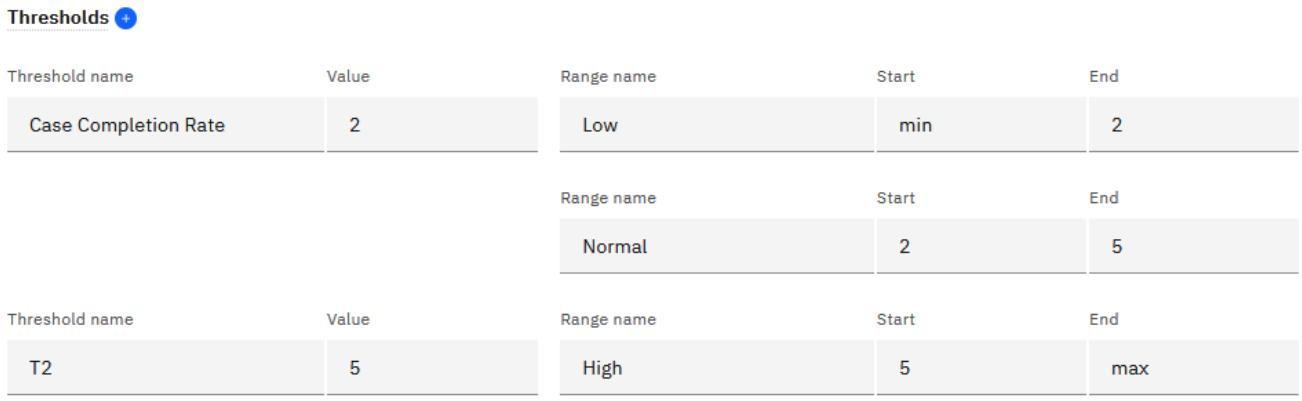
_1. Select the **Thresholds** tab.

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

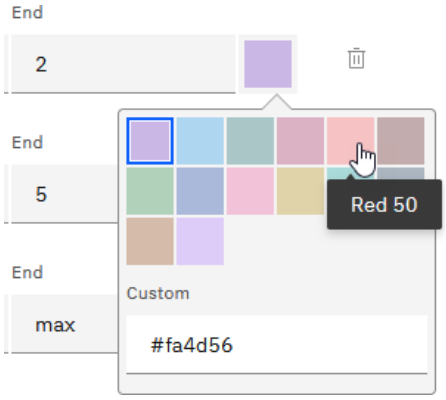
_3. For each Group, select the following values from the dropdown list:

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:



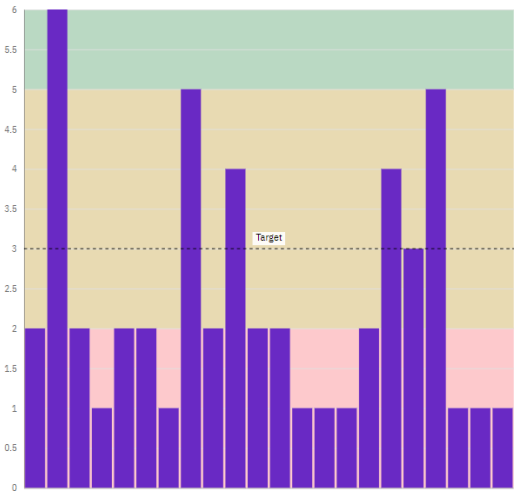
_4. Click the **Color patch** next to **Low**, then select the **Red color patch** from the palette.



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

Item	Value
Normal	Yellow
High	Green

The color settings should look exactly like this:



2.2.9.5 Define Alert

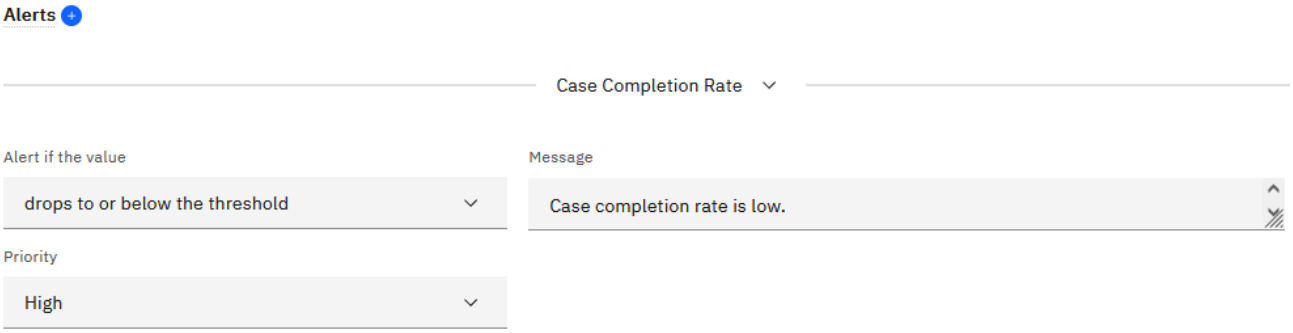
This setting allows you to customize the Gage threshold setting.

_1. Click **Alerts +**

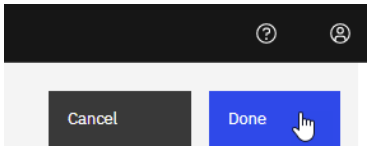
_2. Make sure the threshold **Case Completion Rate** is selected.

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

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



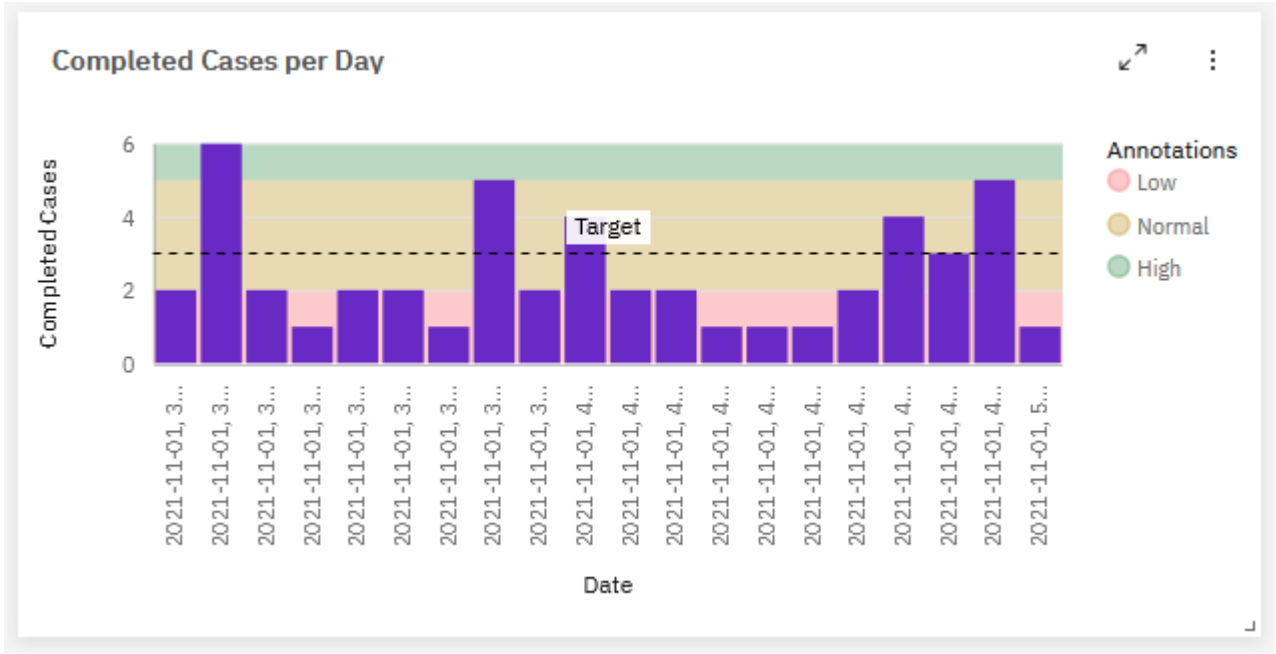
_4. Click **Done.**



Note that 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.

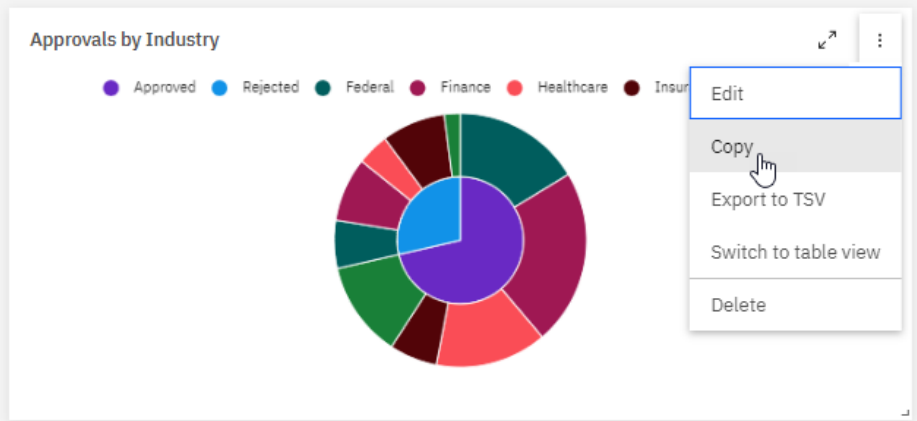


2.2.10 Create "Approvals by Industry Heatmap" Chart

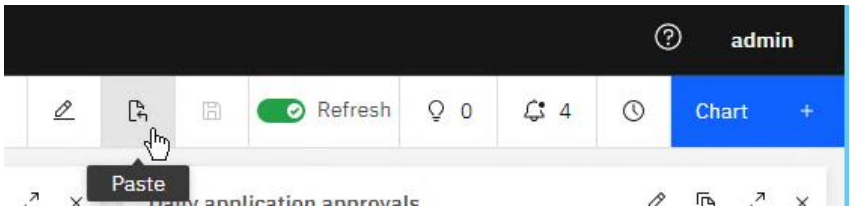
This heatmap chart will use the tile color intensity to indicate the count (the more saturated the color, the higher the count). The tiles will be positioned in a grid. The X-axis will represent the approval state: approved/rejected/approval pending. The Y-axis will reflect the industry.

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

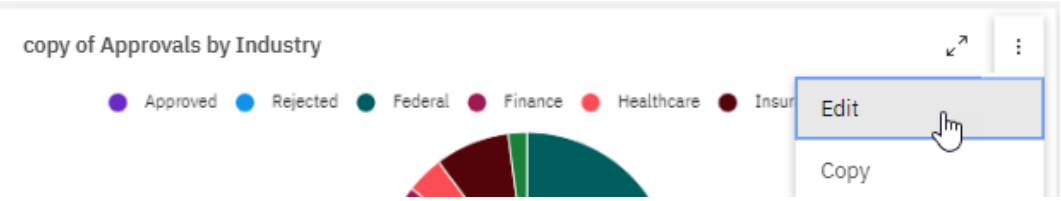
_1. On the A*pprovals by Industry* chart, click the **ellipses** and select **Copy.**



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

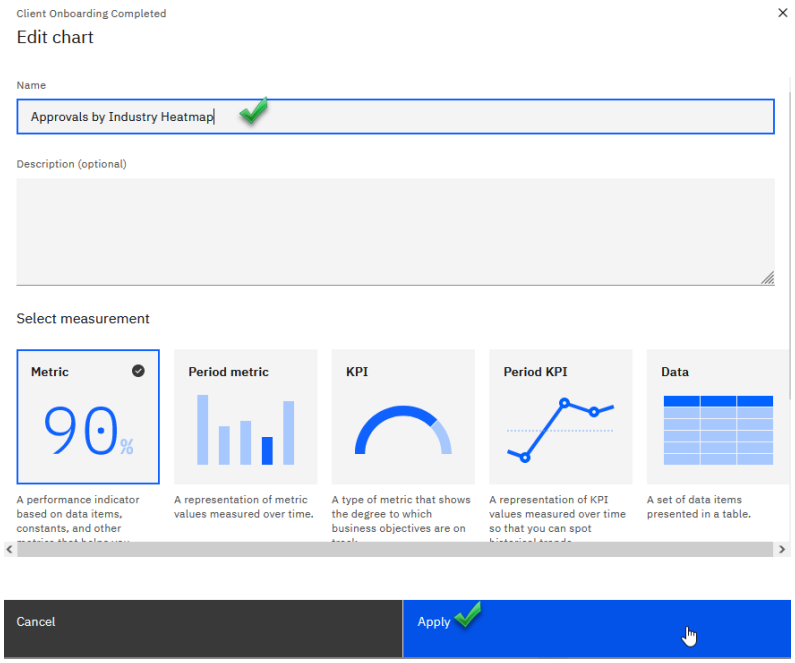


_3. On the *copy of Approval by Industry* chart, click the **ellipses** and select **Edit.**



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

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

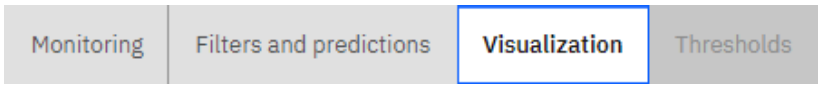


2.2.10.1 Define Monitoring Information

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

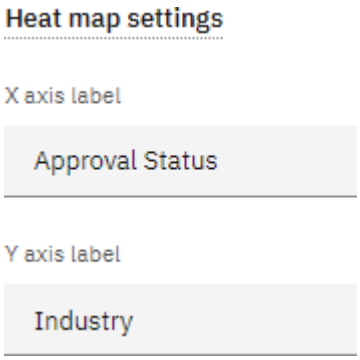
2.2.10.2 Define Visualization Information

_1. Click the **Visualization** tab.

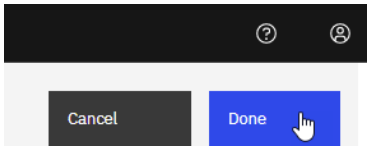


_2. For Trend settings, enter:

Item	Value
X axis label	Approval Status
Y axis label	Industry

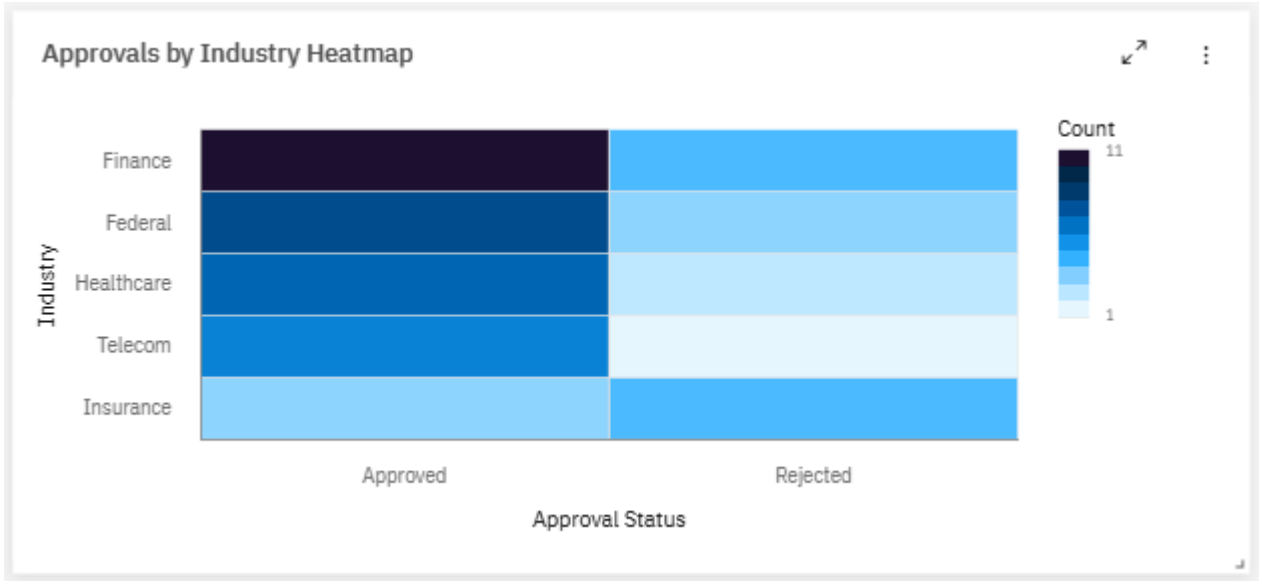


_3. Click **Done.**



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

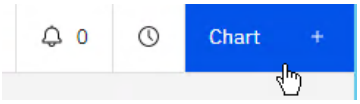
Your chart should look similar to this.



2.2.11 Create "Client Onboarding Data" Chart

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

_1. Click **Chart +**



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

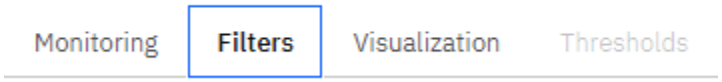
Item	Value
Name	Client Onboarding Data
Select measurement	Data

2.2.11.1 Define Monitoring Information

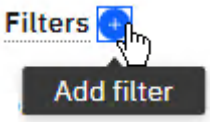
_1. For the *Monitoring source,* select Workflow (Case) – Client Onboarding.

2.2.11.2 Define Filters

_1. Select the **Filters** tab.



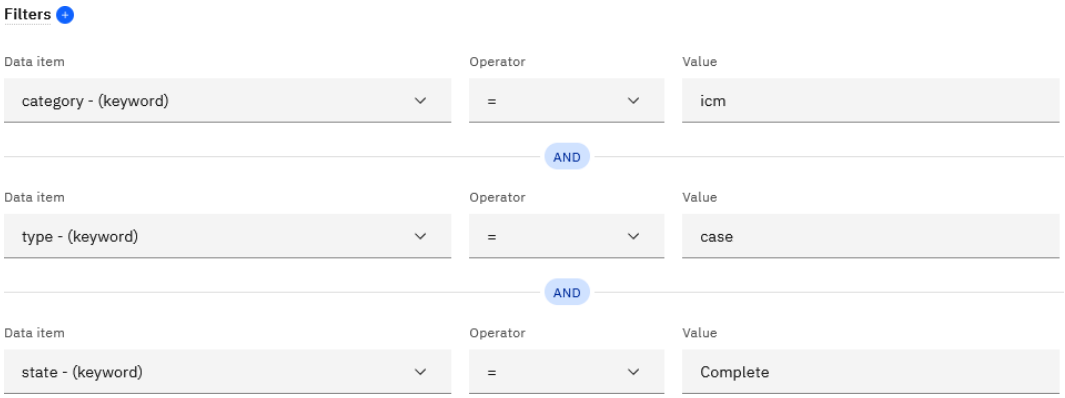
_2. Click the **Filter +** button **three** times to add three filters.



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

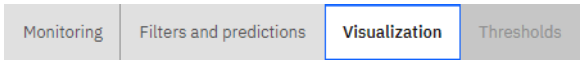
Group	Data item	Operator	Value
1	category – (keyword)	=	icm
2	type – (keyword)	=	case
3	state – (keyword)	=	Complete

Your Filters setting should look exactly like this:



2.2.11.3 Define Visualization

_1. Select the **Visualization** tab.

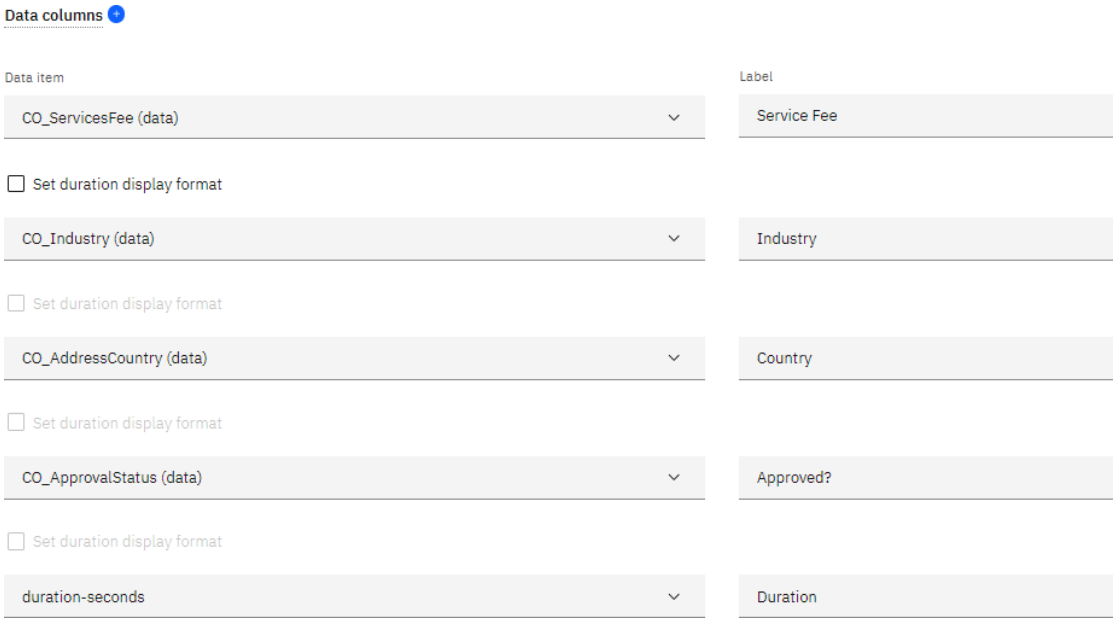


_2. Click the **Data columns +** button **five** times to add five data columns.

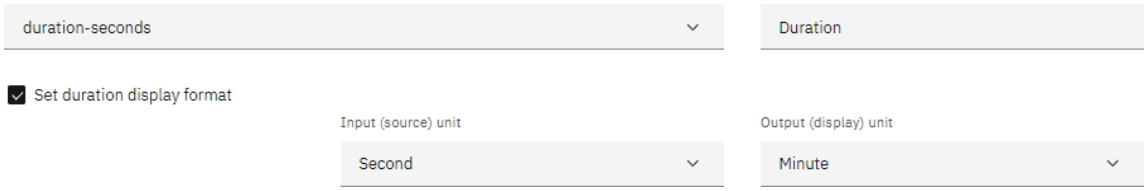
_3. For each Group, select the following values from the dropdown list:

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

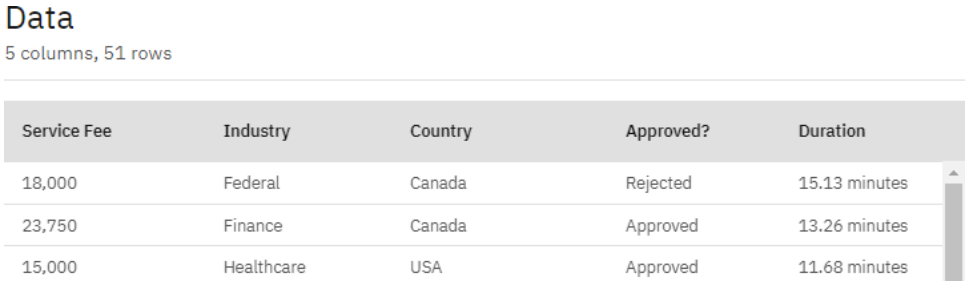
Your *Data columns* setting should look exactly like this:



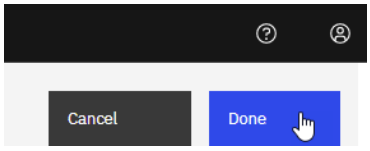
_4. For the *Duration* table column, select **Set duration display format**, set *Input (source) unit* to Second, and for the *Output (display) unit,* select **Minute.**



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



_5. Click **Done.**



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

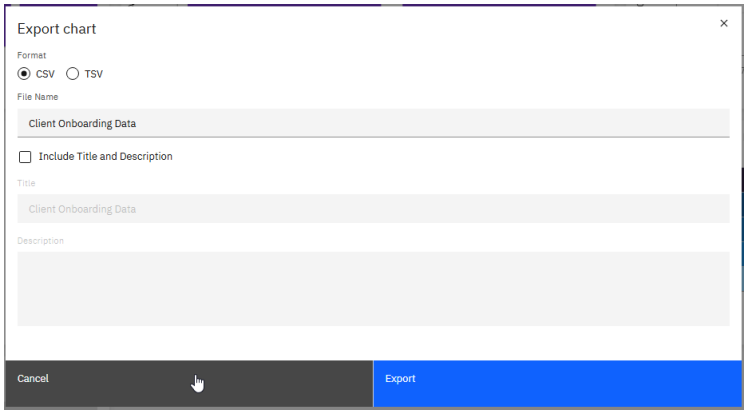
2.2.11.4 Explore the Table Chart

You can export the data in the chart as a spreadsheet in CSV format.

_1. Click the Duration column to sort the table rows by Duration in descending order.

_2. Click **vertical ...** and select **Export to ...**

_3. On the *Export chart* window, click **Cancel**.

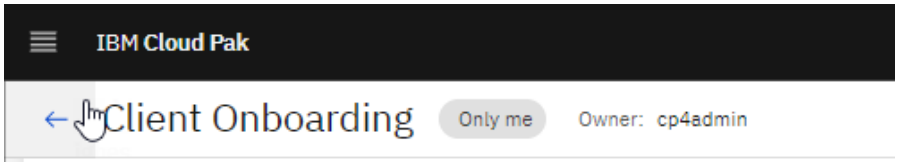


2.2.12 Create a Configure Goal

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.

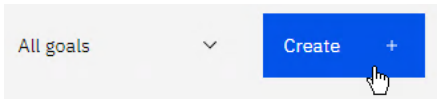
2.2.12.1 Create a Goal

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



_2. Click **Goals**

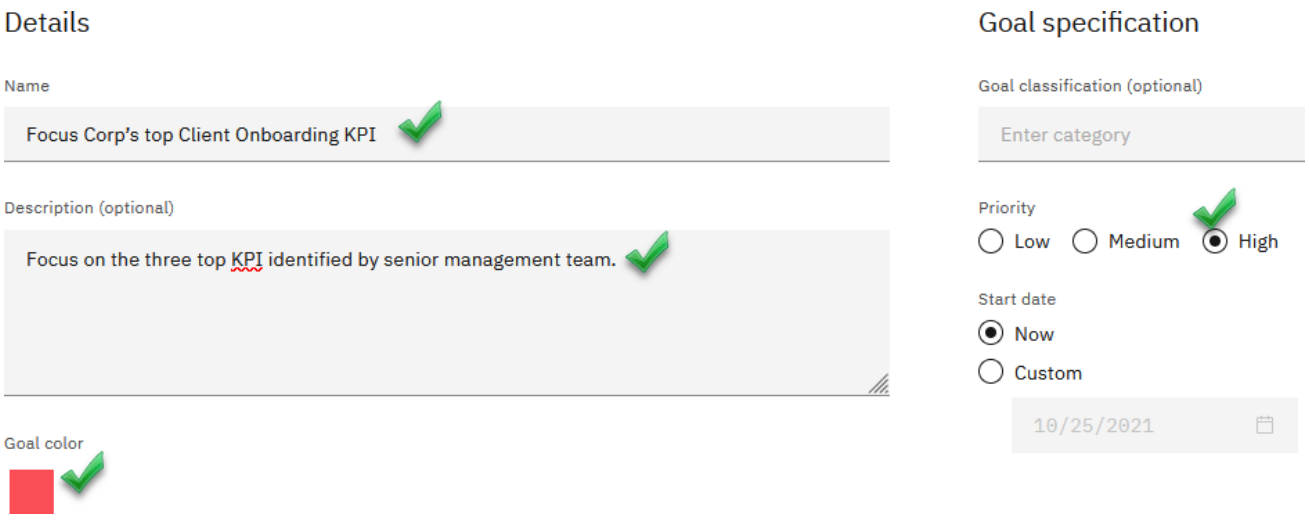
_3. Click **Create**



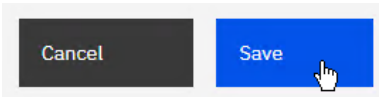
_4. Complete the Goal specifications:

- For *Name*, enter **Focus Corp's top Client Onboarding KPI**
- For the *Description*, enter **Focus on the three top KPIs identified by the senior management team.**
- For *Priority*, select **High**
- Set *Goal color* to **Red**

Your Goal definition should look exactly like this:

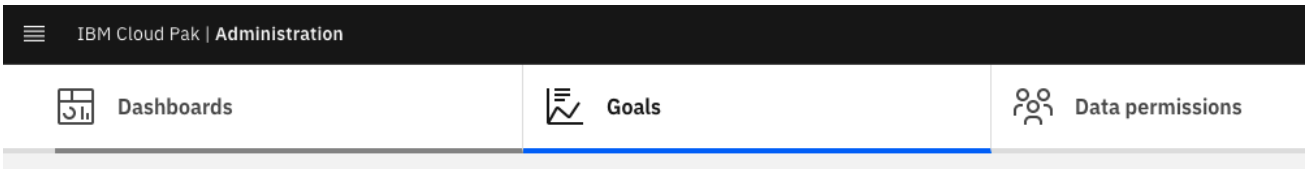


_5. Click **Save.**

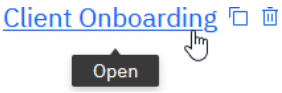


2.2.12.2 Set a business goal for selected charts

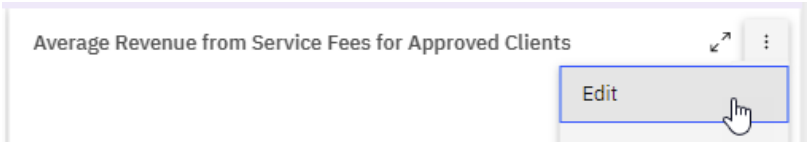
_1. Click **Dashboards.**



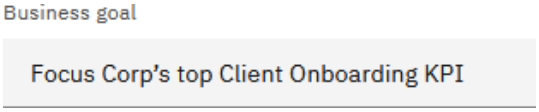
_2. Click the **Client Onboarding** dashboard.



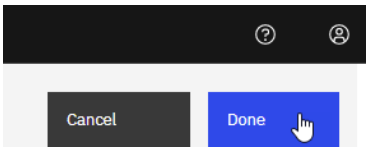
_3. On the **Average Revenue from Service Fees for Approved Clients** chart, click the **ellipses** and select **Edit.**



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

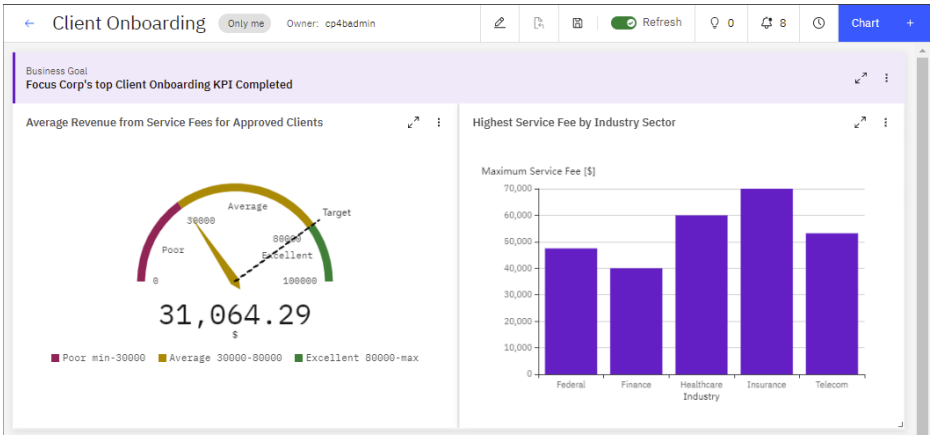


_5. Click **Done.**



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

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

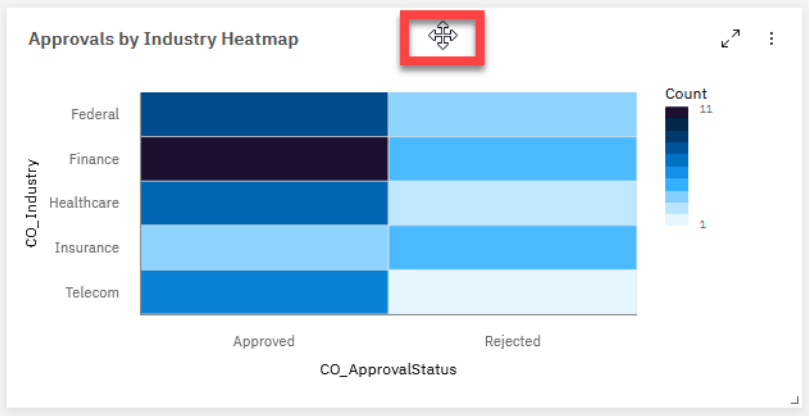


2.2.13 Change Dashboard Layout

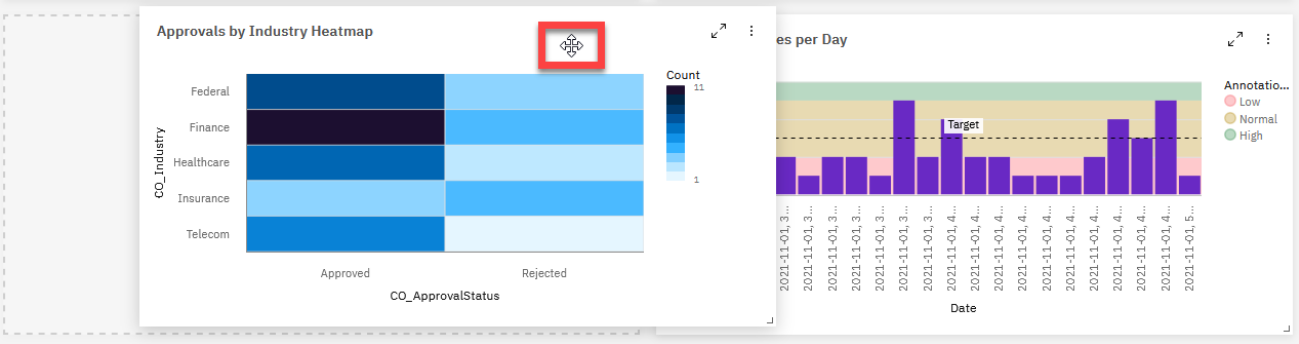
You will now customize your Dashboard by moving and changing chart sizes.

2.2.13.1 Move Approvals by Industry Heatmap Chart

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

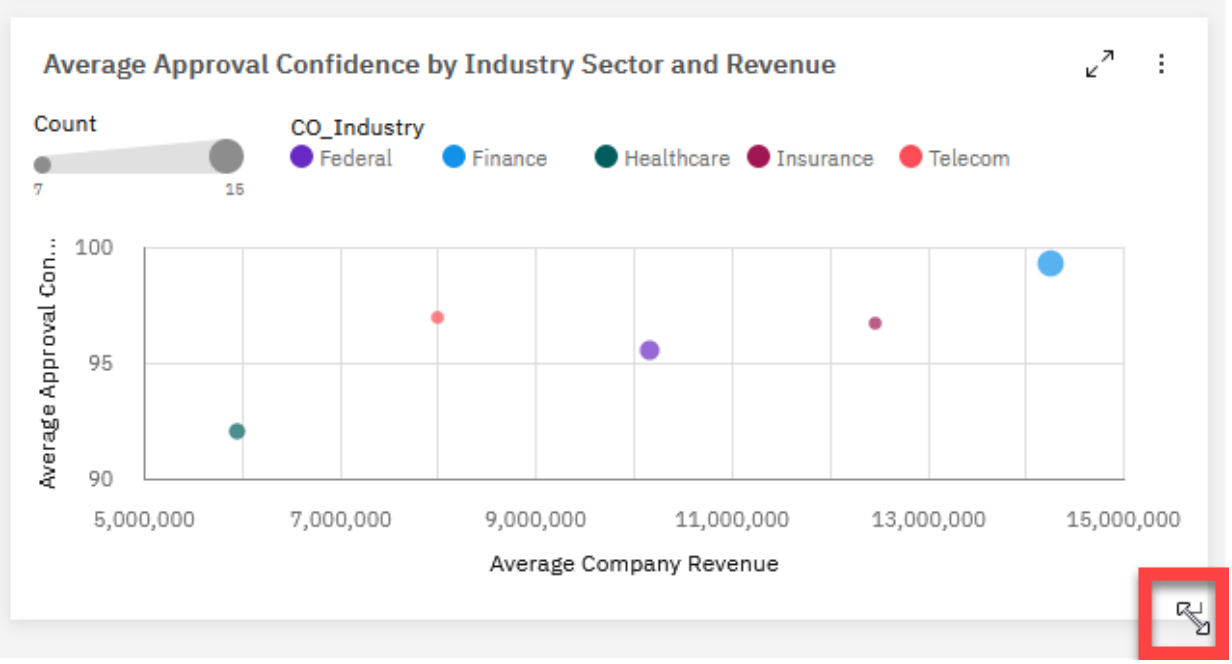


_2. **Drag** the chart to the empty area left of the Completed Cases per Day chart and release.

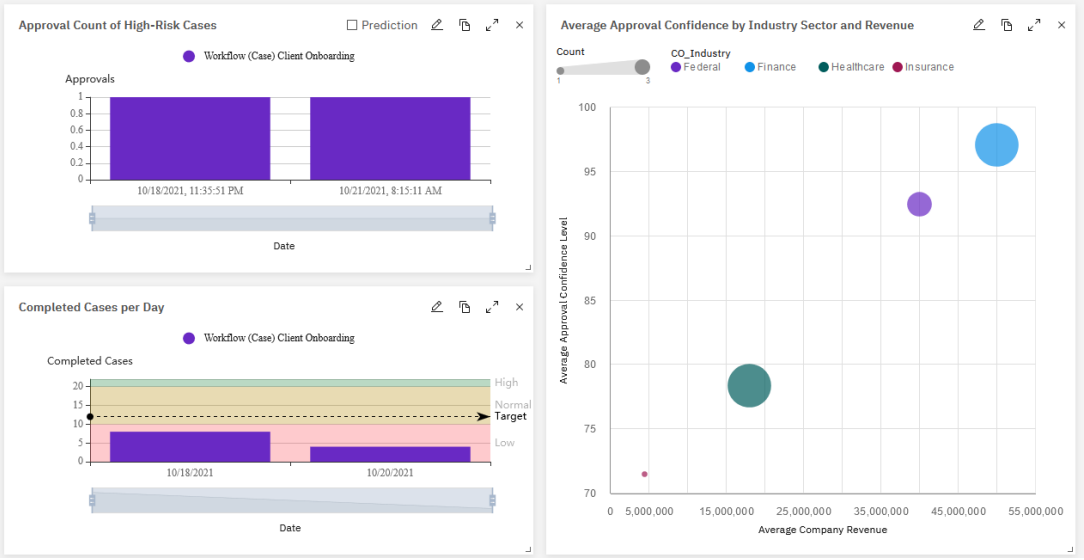


2.2.13.2 Expand chart Average Approval Confidence by Industry Sector and Revenue.

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

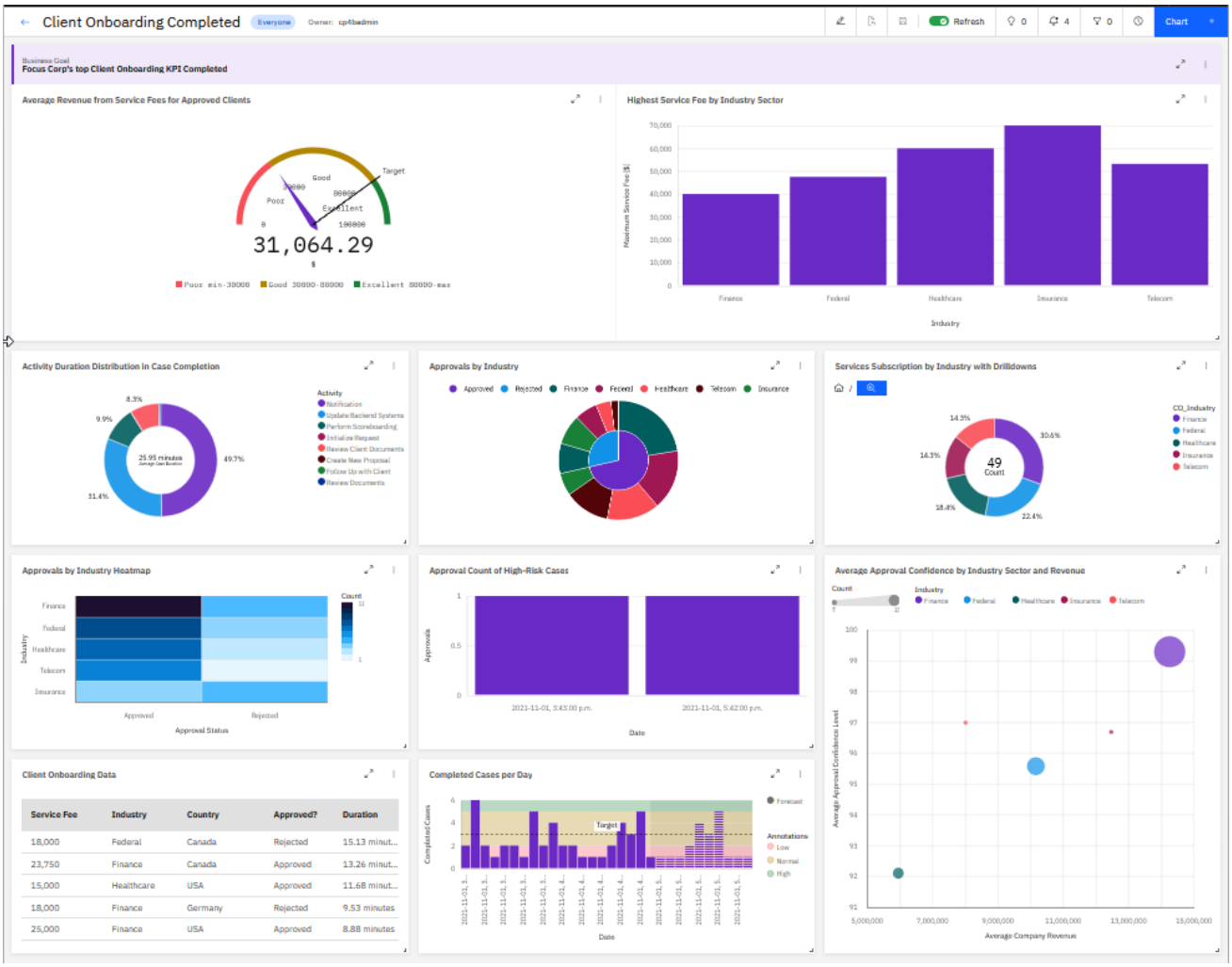


_2. Stretch the chart downwards until it achieves the height of two charts.



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

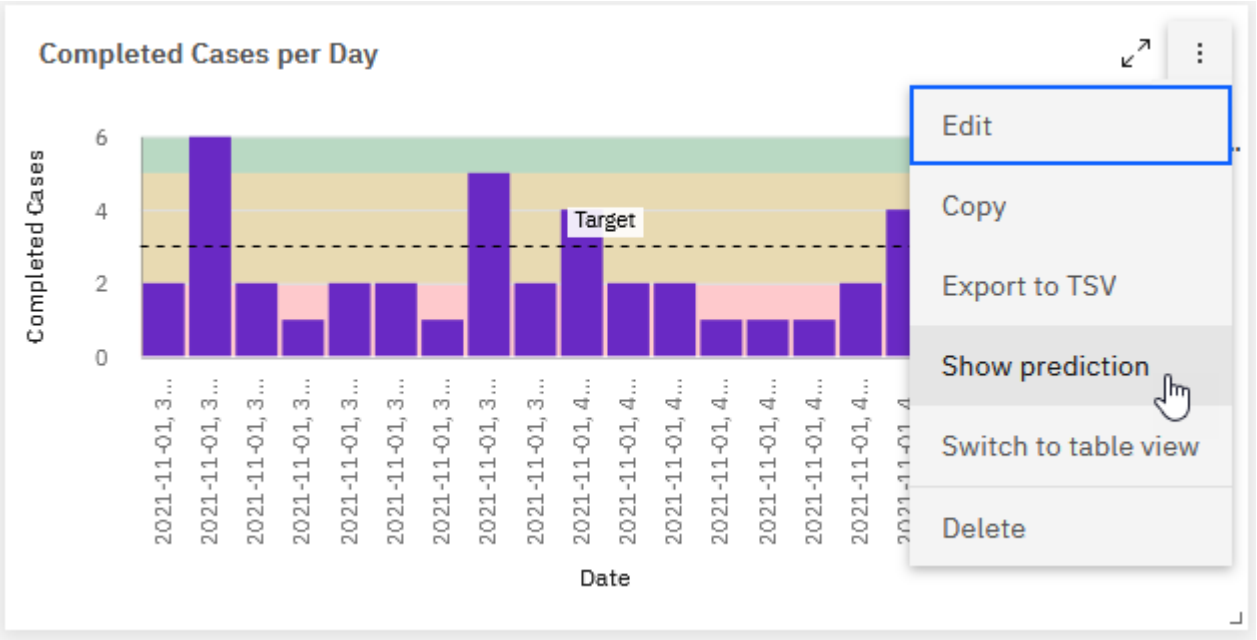
_4. Your final version of the Client Onboarding Dashboard should now look similar to this:



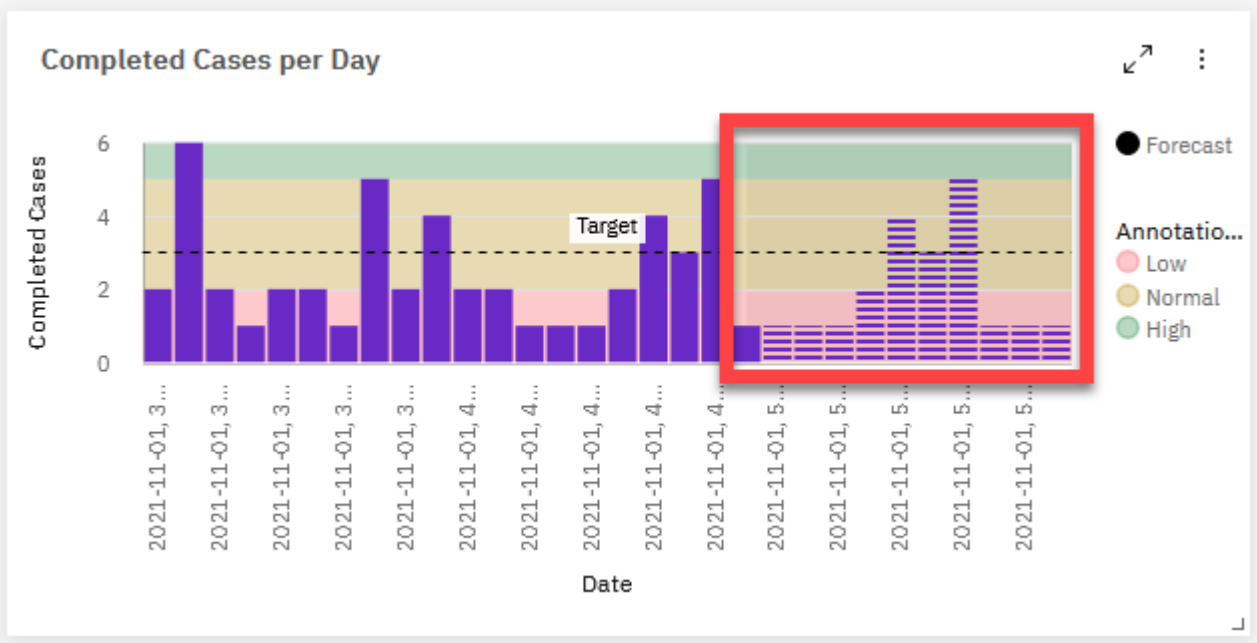
2.2.14 Explore Advanced Dashboard Features

2.2.14.1 KPI Predictions

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

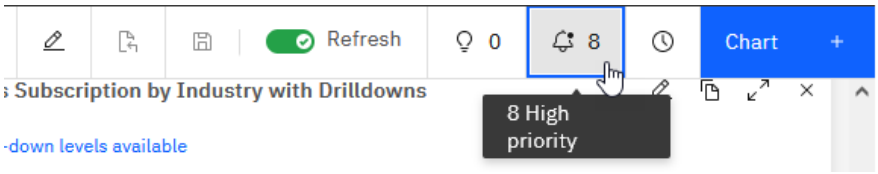


_2. You should now see the predicted case completion rate information.

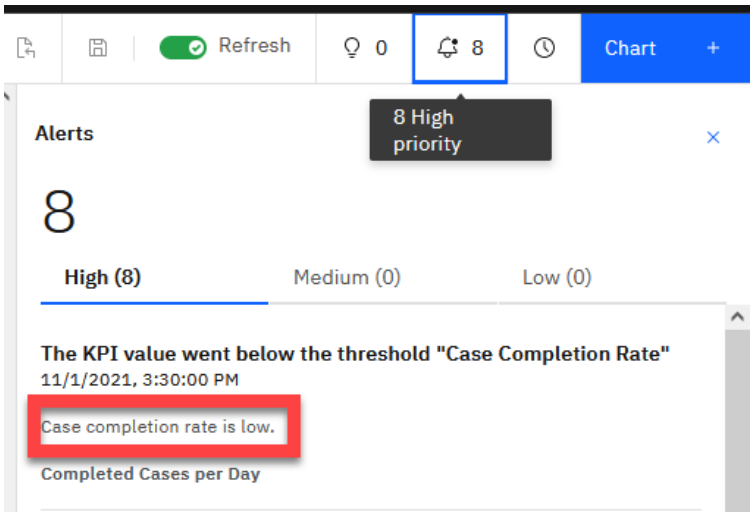


2.2.14.2 Dashboard Alerts

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



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



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

2.3 Summary

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

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