Lab Guide

Dashboards in IBM RPA

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Hands-on Lab

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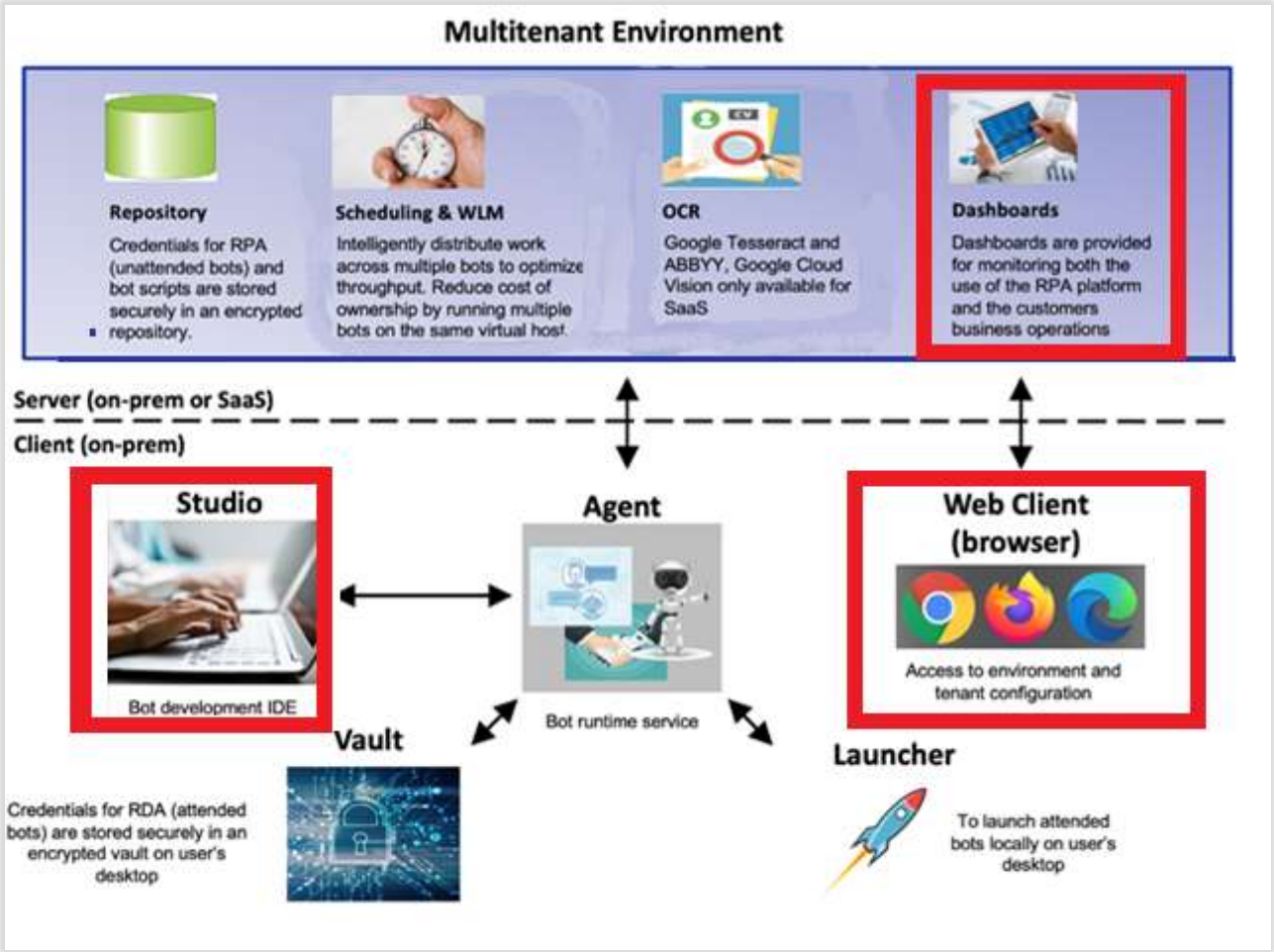
1 Introduction

In this lab we implement a Dashboard for the refund bot created in the Bot Design Lab.

The context of this lab is shown in the highlighted area below.



1.1 What is the difference between Dashboards and Reporting?

It is important to distinguish between RPA Dashboards and RPA Reporting. Outwardly they have similar functionality- to create charts from data. But they serve two distinct purposes. Reports are normally customer focused and Dashboards are normally administration focused. In other words, reports are created for end users and dashboards are used by administrators to resolve problems with bots.

The IBM RPA Dashboard can read data from three sources:

- Jobs
- Counters
- Workflows and Processes

In this lab we will examine Counters. For a tutorial on all aspects of the Dashboard, see https://learn.ibm.com/course/view.php?id=9051

In this lab we use counters to graph the state of the Refunds bot.

1.2 Prerequisites

To run this lab, you will need to have the Refunds bot ready in RPA Studio. See `Bot Design – Lab Guide`.

Scenario - Refund Report

We will create a dashboard to show the counters of the Refund bot.

1.3 Scenario Description

Jon is an RPA administrator responsible for monitoring the refund bot. At end of the day, he sends a pdf to his manager to indicate whether the bot has met its SLA (service level agreement). He exports a pie chart to show refunds in the following states:

- Backend Error
- BotError
- InvalidAmount
- InvalidPaymentType
- InvalidTicket
- Success

1.4 Start

Open the Firefox Browser and navigate to the RPA tenant. If you are using the Skytap image, the URL is https://localhost:20000/#/en-US/account/login

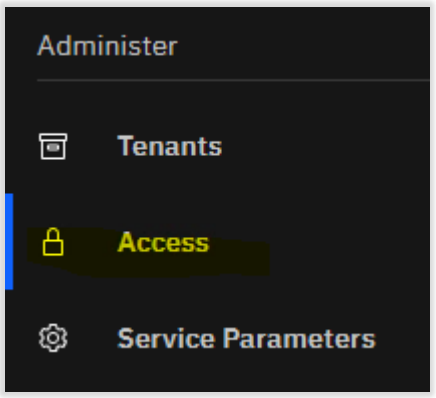
1.5 Log In

Login with your username and password. If you are using the SkyTap image, it is *admin@ibmdba.com* / *passw0rd*

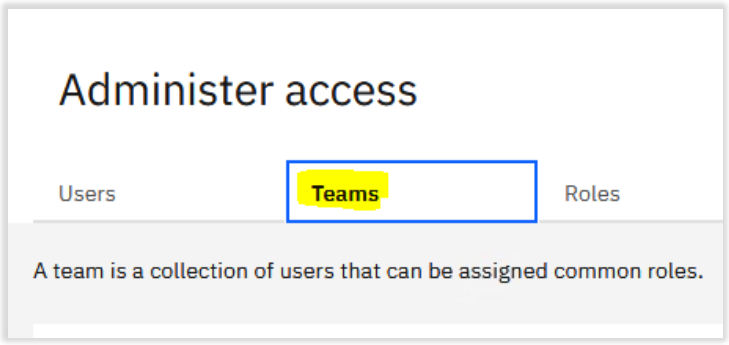
1.6 Create and Assign developer Role

By default, the admin user does not have a developer role. In this step we will create and assign this role

In the tenant main menu bar, click on *Access*:

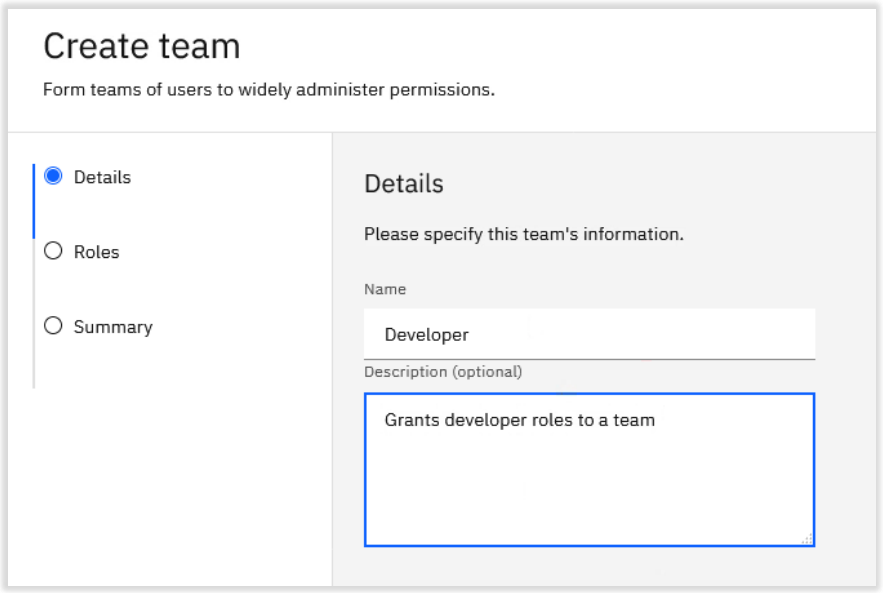


Now click on Teams:



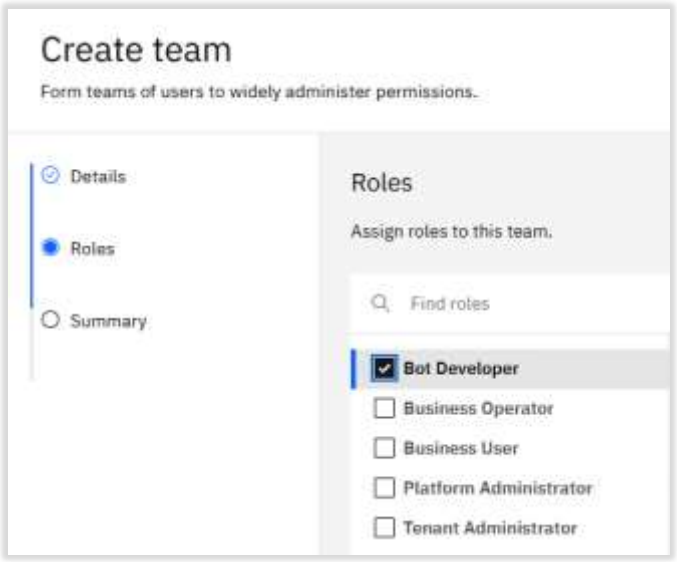
Click the *Create team* button:

Create the Developer Team:



Click *Next*

Click Bot Developer as the Role



Click *Next* and then *Create.*

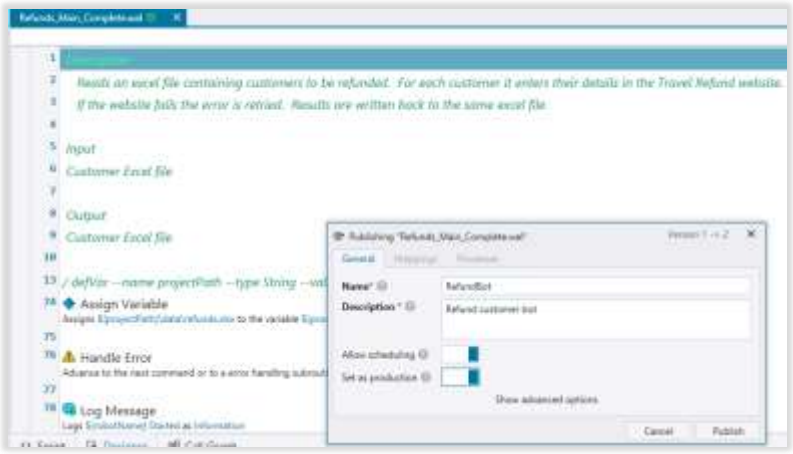
Click on the newly created Developer Team and press *Manage users*

Select Admin:

Press *Save* and logout of the RPA Web Console. The admin user now has developer rights.

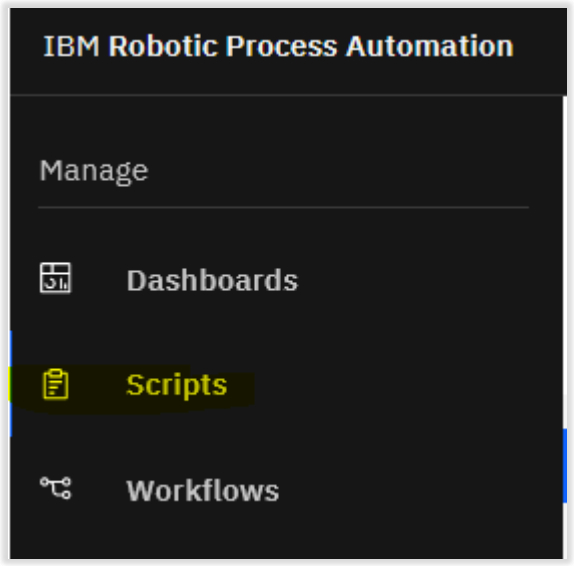
1.7 Publish script

From RPA Studio, publish the *Refunds_Main_Complete* script from the Bot Design Lab:



1.8 Enter Scripts Menu

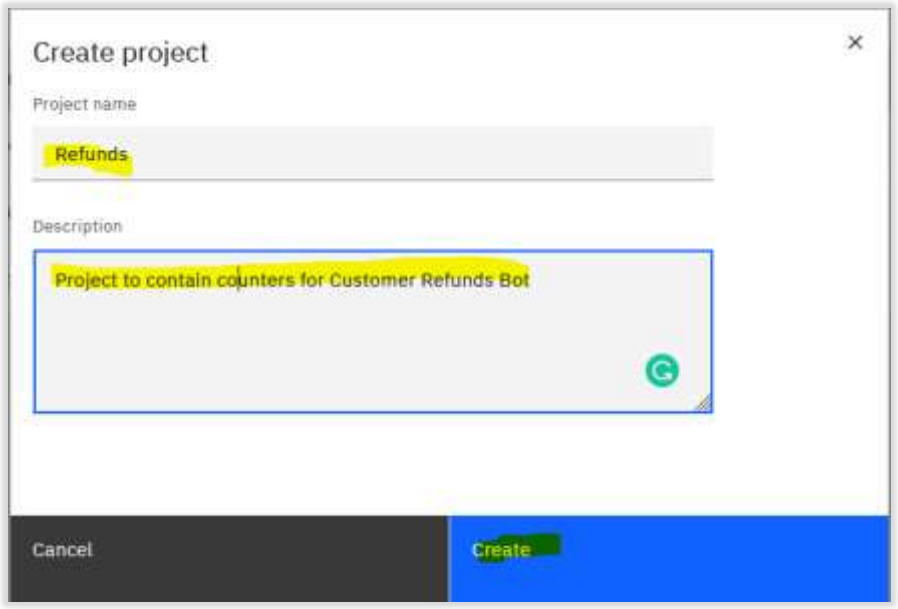
Log back in to the RPA Web Console, click *Scripts*:



1.9 Enter Projects Panel

Click the *Projects* tab within *Manage Scripts*, and select *Create Project*:

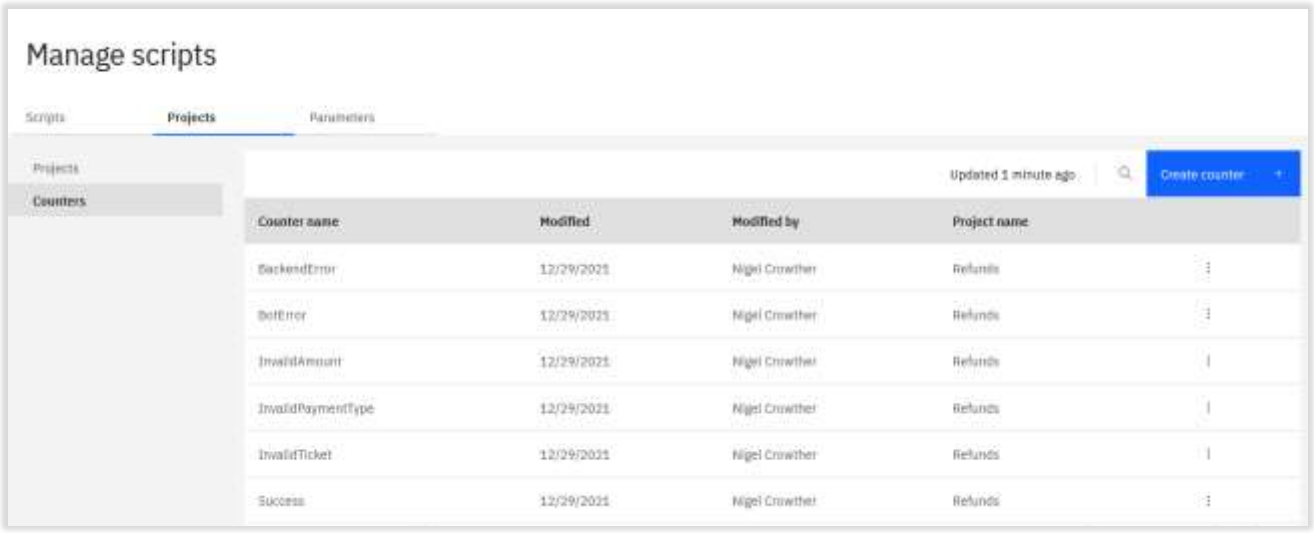
Enter *Refunds* as the name of the project, enter an optional description and then press *Create*



Still in the Projects tab, select *Counters* and then press *Create Counter*:

Create the six counters as shown below:

```
BackendError
BotError
InvalidAmount
InvalidPaymentType
InvalidTicket
Success
```

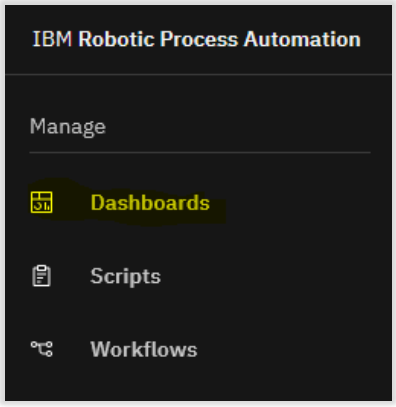


1.10 Run the Refunds bot

Run *[Project_path]/Artefacts/Refunds_Main_Complete.wal* implemented in the Bot Design Lab. It should run without errors and increment the counters.
Tip: you may need to reset your excel file so that customers are processed.

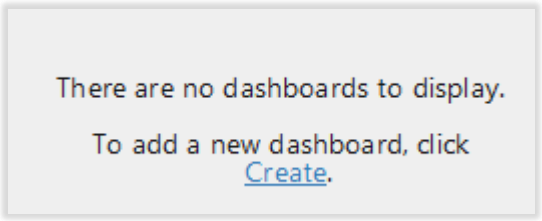
1.11 Enter Dashboard Menu

Back in the tenant main menu, Click *Dashboards*:



1.12 Create a Refund Status Dashboard

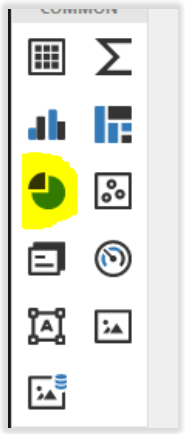
In the Dashboards menu, create a new dashboard. Press *Edit in Designer*.
Click *create*:



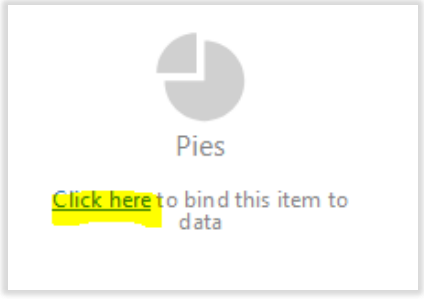
Set the Dashboard Name to *Bot Status*

Choose the data source to *Default* and then press *Create*. Refresh your browser.

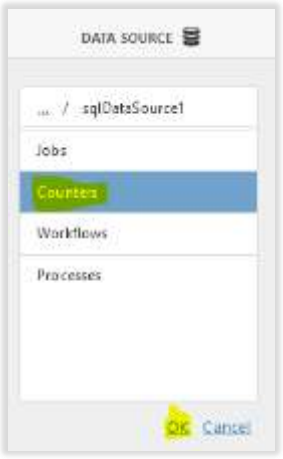
Go back to the Dashboard main menu and select the report you just created.
Click Edit in Designer.
Click the *Pie* icon:



Click on the *Click here* link to bind the chart to the counters data source:

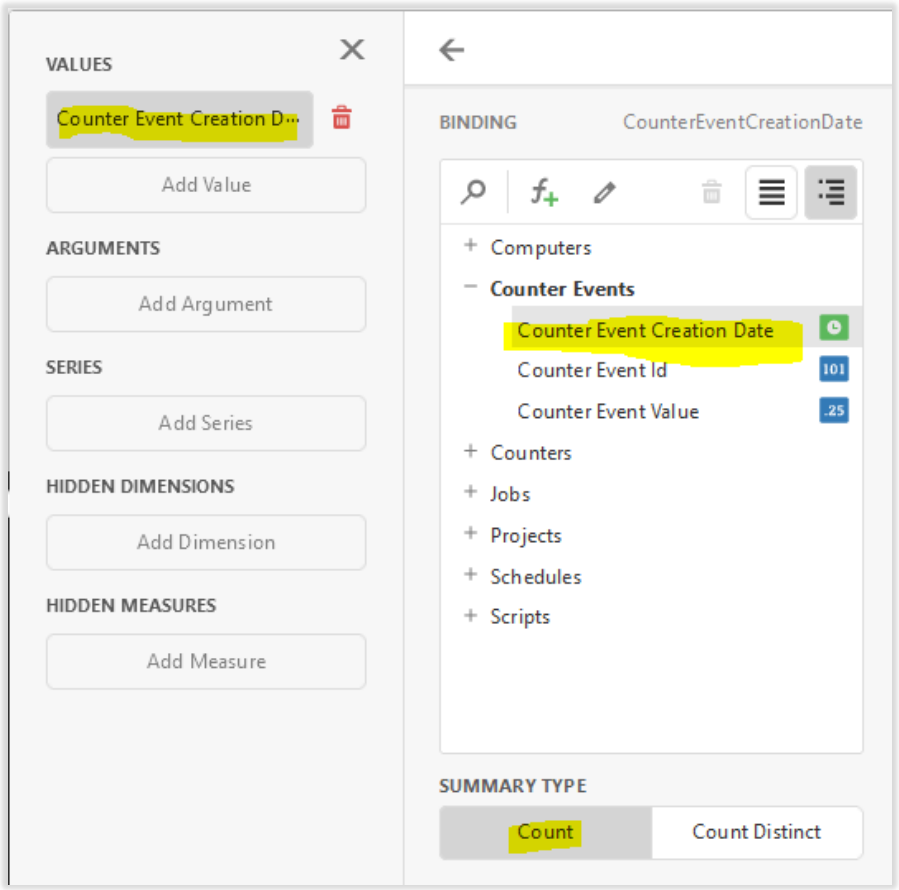


At the bottom of the data selection panel, set the data source to *Counters* and then press *OK*:

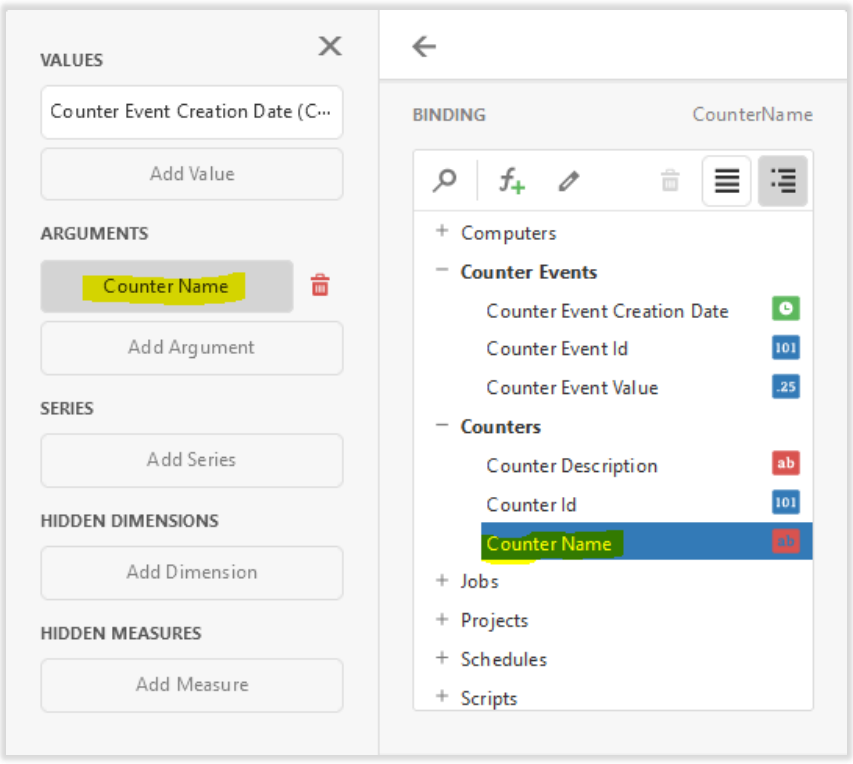


Click on the *Click here* link again, this time to bind data:

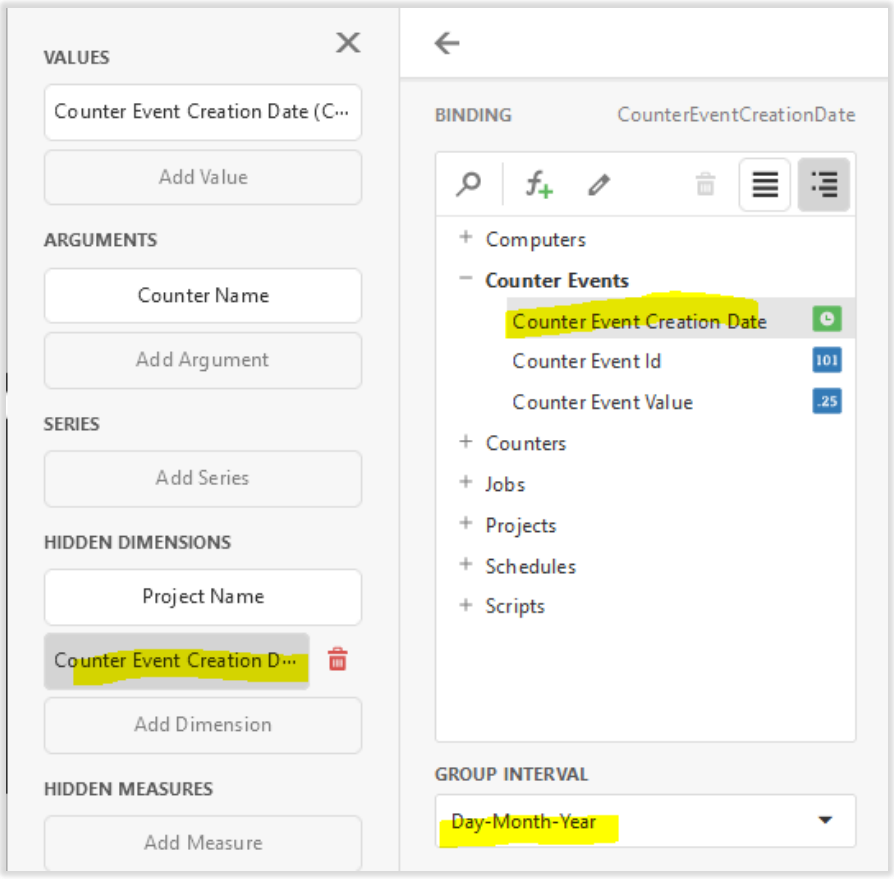
Configure the chart data values. Set as follows:



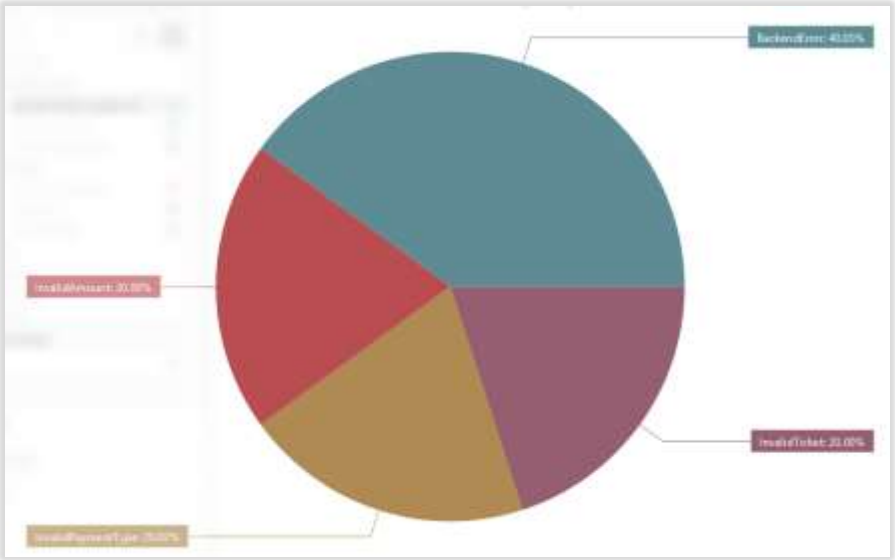
Next set the Arguments (or the name of the segments):



Now add a Hidden Dimension *Counter Event Creation Date*. Ensure it is in *day–month–year* format:



Examine the chart you created. You should see a chart like this:



1.13 Adding a date filter

The pie chart shows all counters since the beginning of time. We need to add a filter to make it display the counters from today only. Press the filter icon:

In the filter panel, click the pen icon and set the filter query. Enable the *Advanced Mode* check box and then paste the following condition:

```
IsOutlookIntervalToday([Counter Event Creation Date (Day-Month-Year)])
```

You filter dialog should look like this:

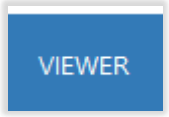
Now the chart will display today's counters only.

Tip: If you see an empty chart, it could be for two reasons:

1. The refunds bot has not incremented the counters. Check the code using the debugger.
2. Check you defined your filter to be *day-month-year* format.

Save Dashboard

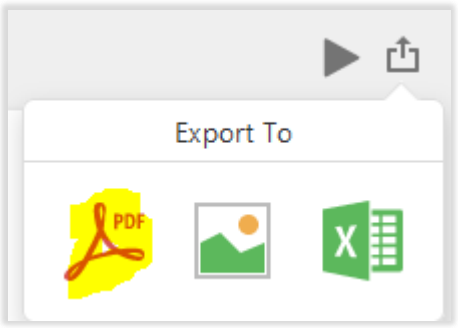
Click on Viewer:



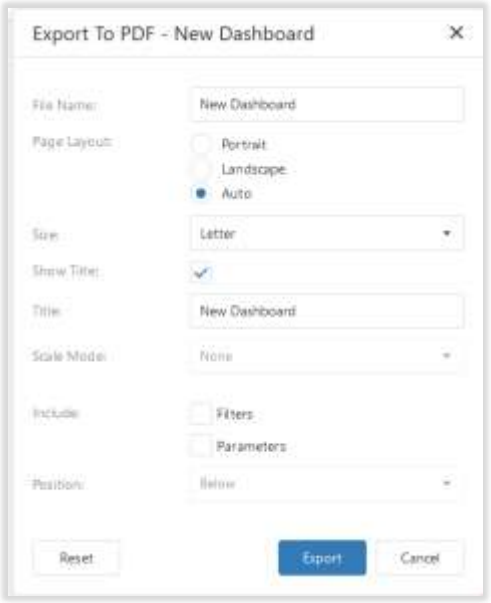
Press *Save*. Now the dashboard can be viewed by other users.

1.14 Export Dashboard to PDF

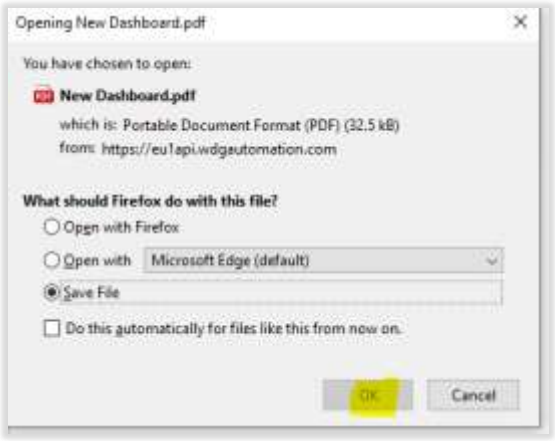
In view mode, click the  icon. This will give you three options to export the dashboard. Choose Pdf:



Select the default options:



Press Export. Set the *Save File* option and press *OK*.



The pdf is saved to your local drive where it can be shared with the business.

Nicely done! This concludes the lab.