Lab Guide

Dashboards in IBM RPA

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Hands-on Lab

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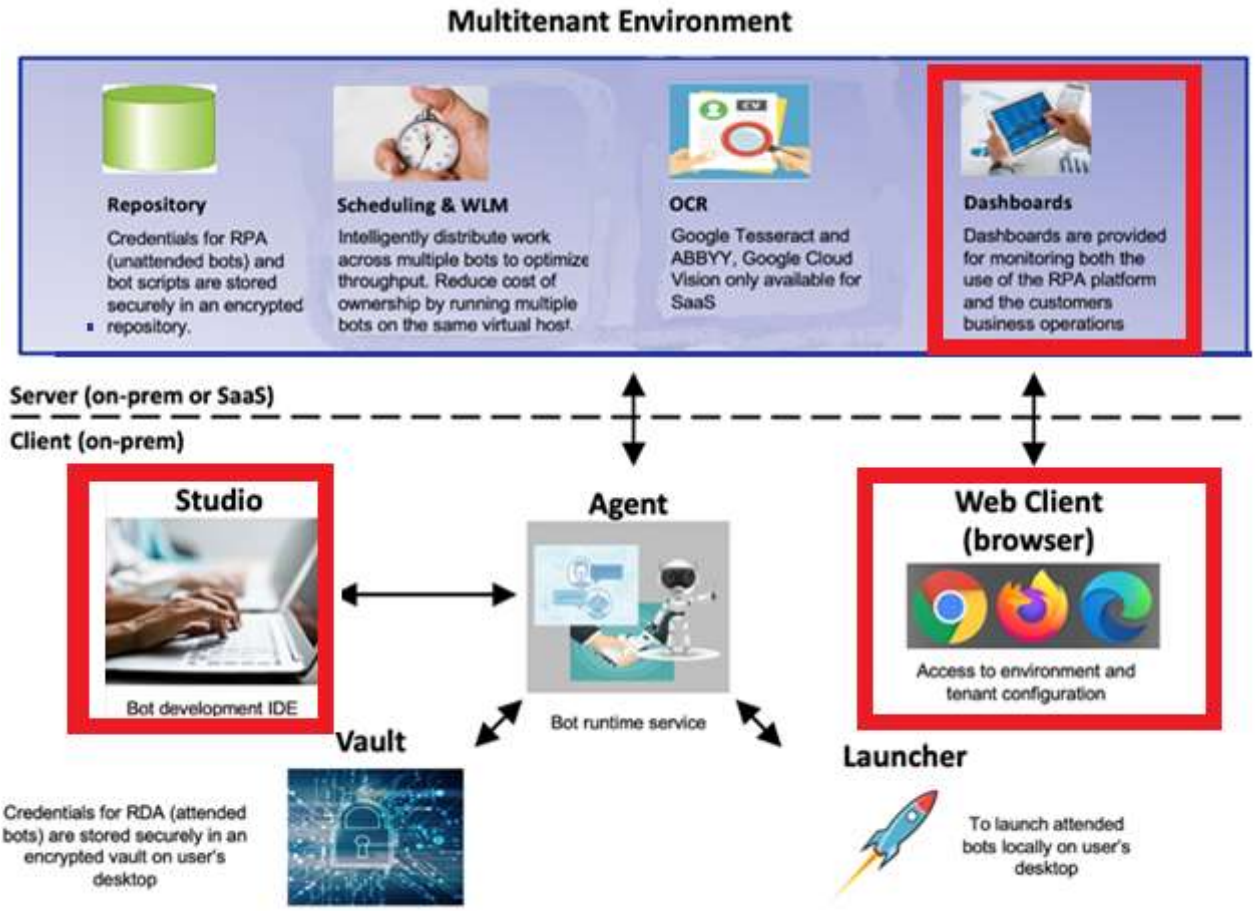
Table of Contents

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 customer focused and Dashboards are administration focused. In other words, Reports are created from user data and viewed by customers. Dashboards are real time and viewed by administrators to find and resolve problems with running 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 to run in your 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

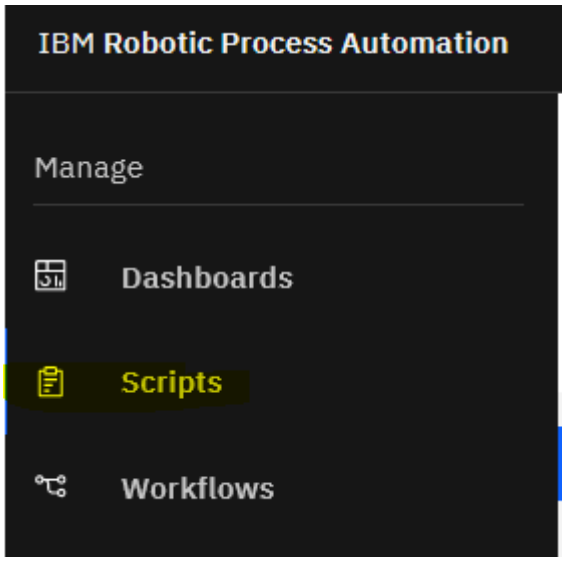
Open the Firefox Browser and navigate to the RPA tenant.

1.5 Log In

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

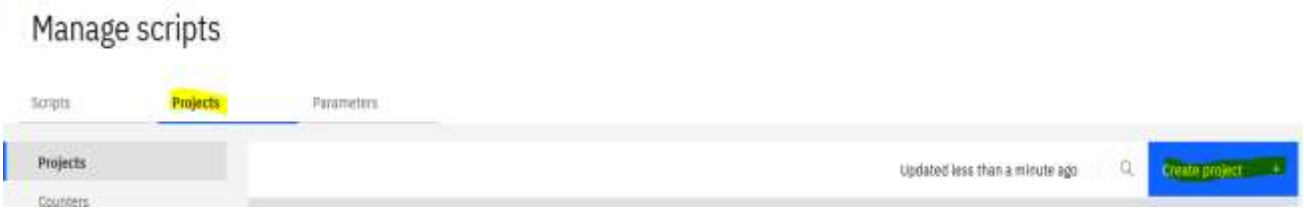
1.6 Enter Scripts Menu

Click *Scripts*:

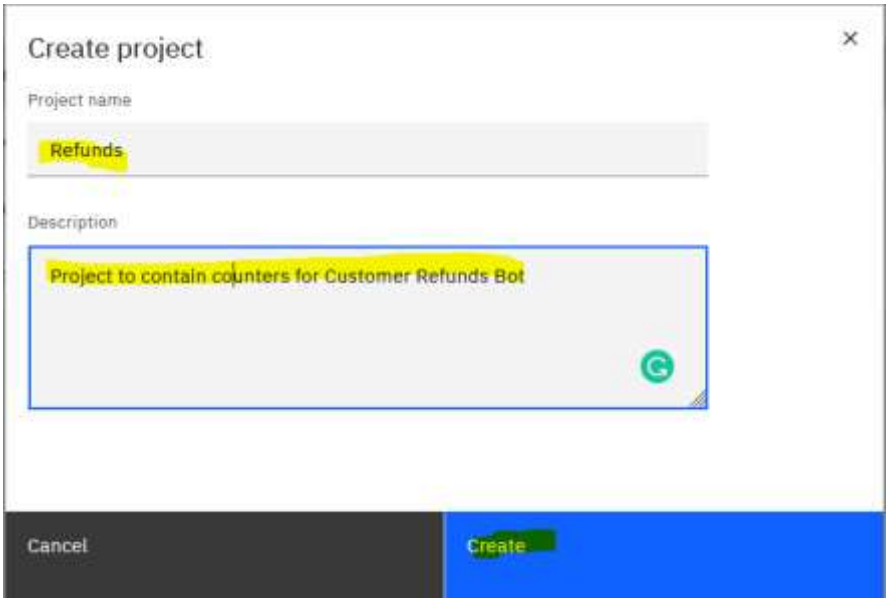


1.7 Enter Projects Panel

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

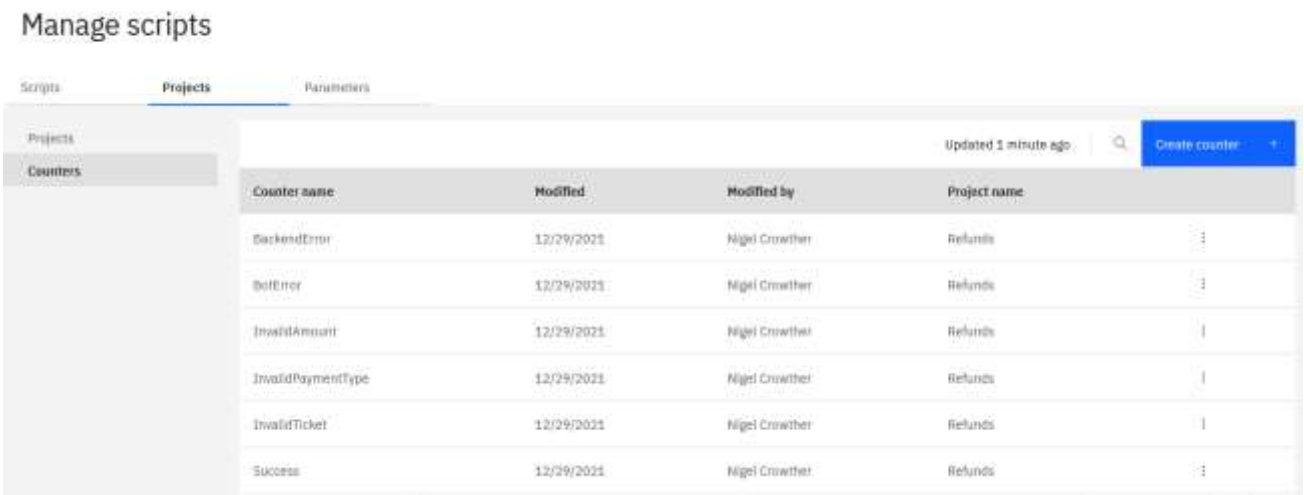


Enter *Refunds* as the name of the project, enter an optional description and then press *Create*



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

Create the six counters as shown below:

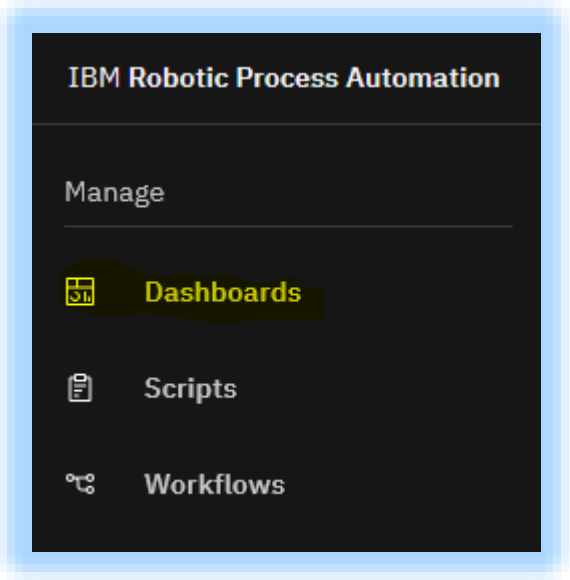


1.8 Run the Refunds bot

Run the *Refunds_Main_Complete_Counters.wal* that you implemented in the last lab in the Bot Design Lab. This should run without errors and increment the counters.

1.9 Enter Dashboard Menu

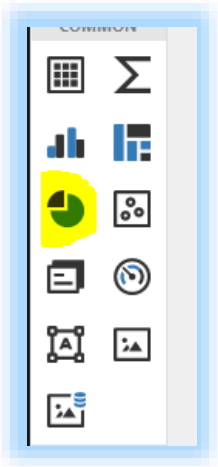
Back in the main menu, Click *Dashboards*:



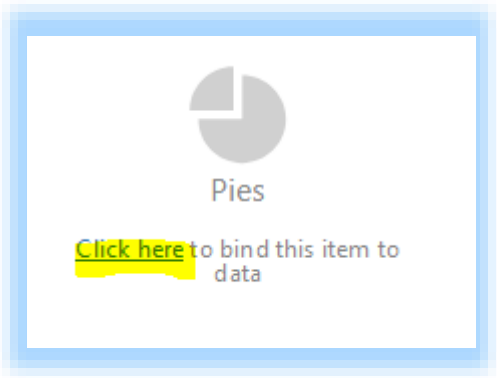
1.10 Create a Refund Status Dashboard

In the Dashboards menu, create a new dashboard. Press *Edit in Designer* to edit it.
Set the name of the dashboard to *Bot Status*.

In the report designer, click the *Pie* icon:



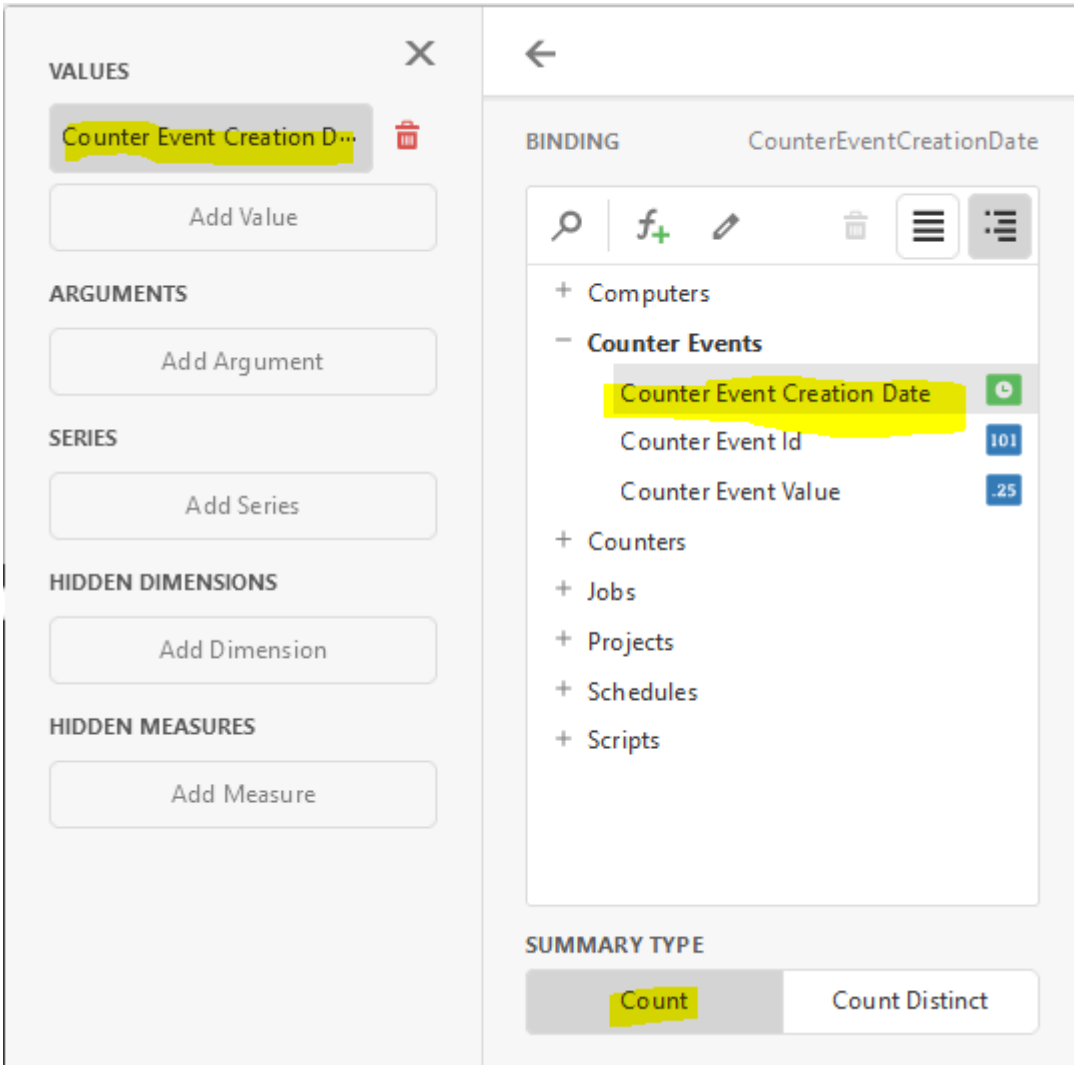
Click on the *Click here* link to bind the chart to a data source:



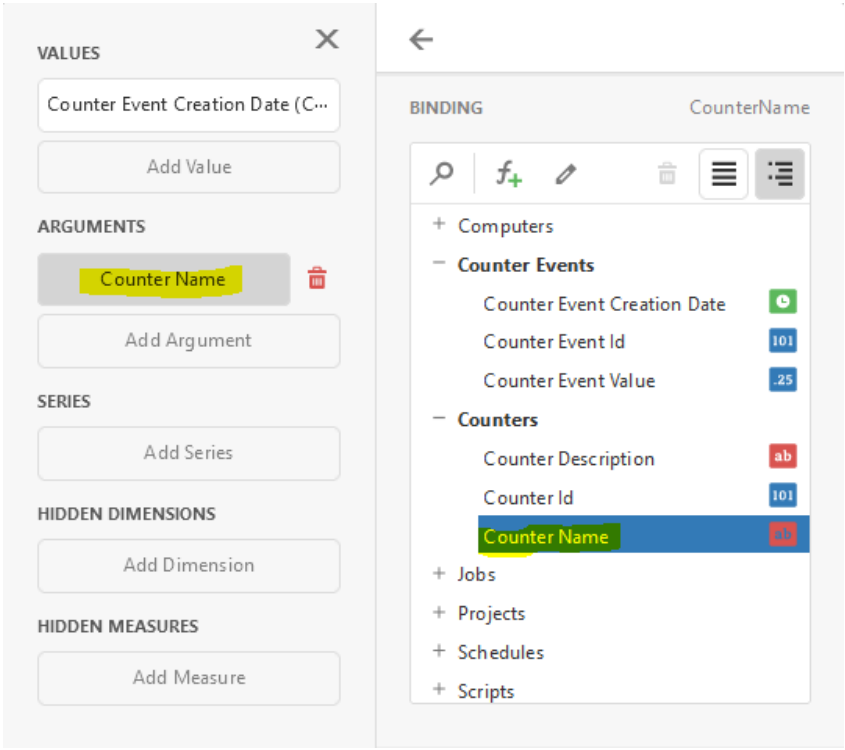
At the bottom of the data selection panel, set the data source to *Counters* and then press *OK*:

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

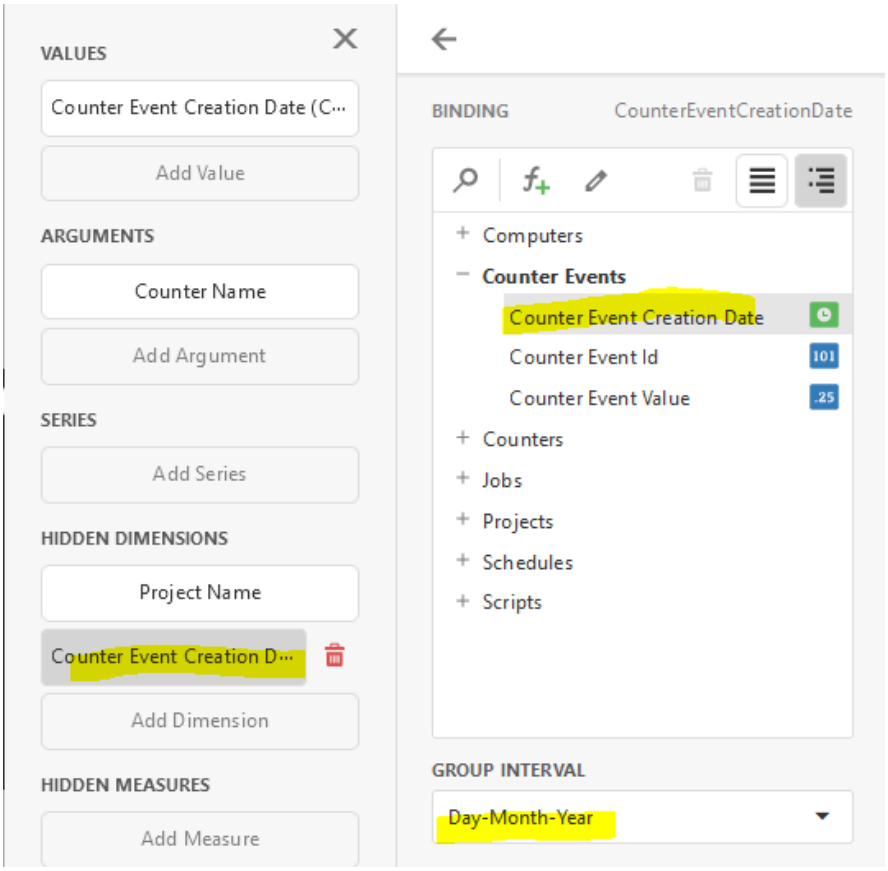
Configure the chart data values. Set as follows:



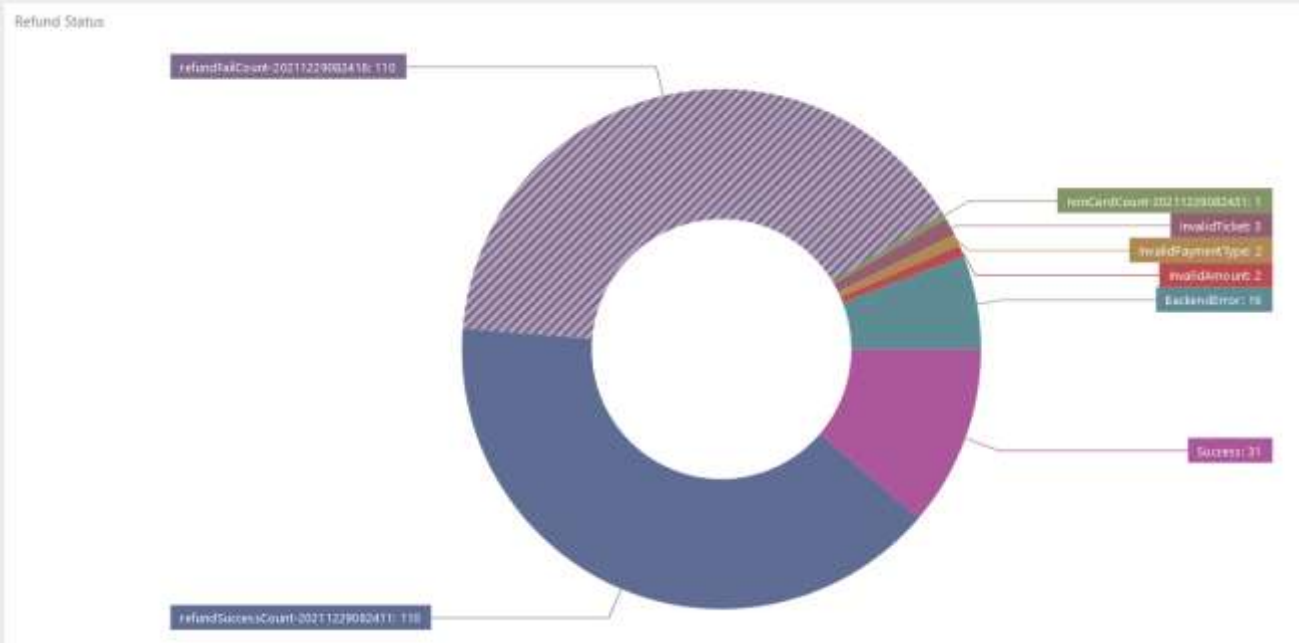
Next set the Arguments (or the name of the segments):



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



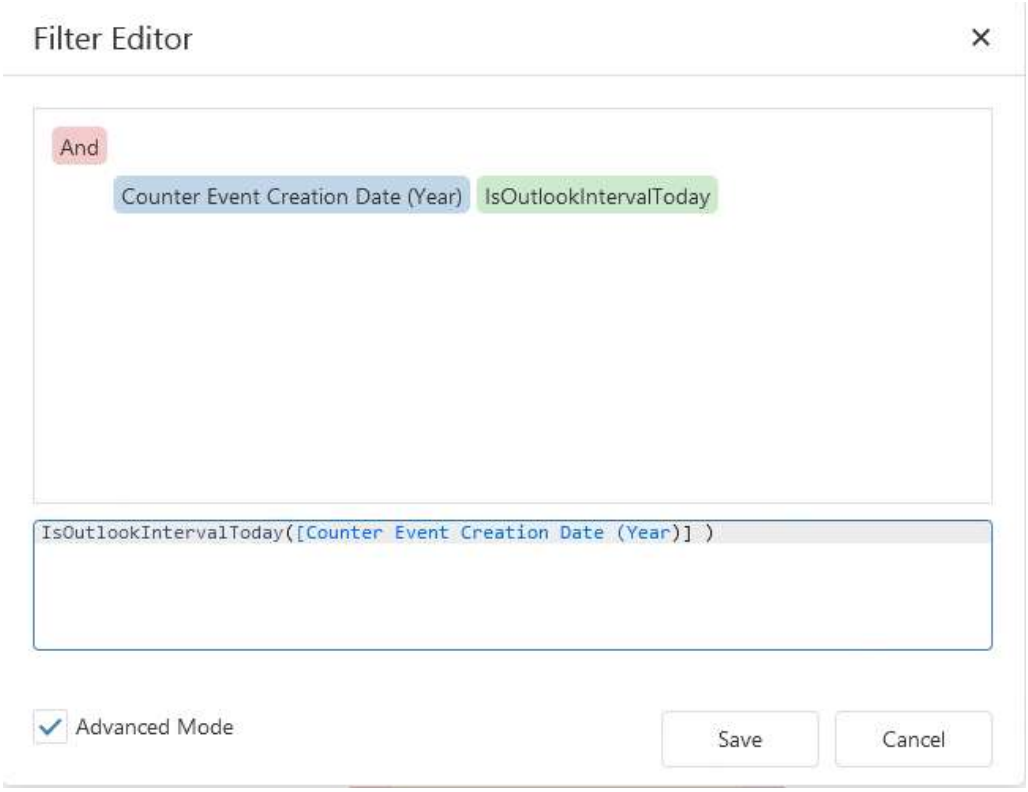
Examine the chart you created. You should see a pie chart like this:



1.11 Adding a date filter

The pie chart is set to show 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. The Advanced Mode check box and create the following condition:



Now the chart will display only counters incremented today.

Save Dashboard

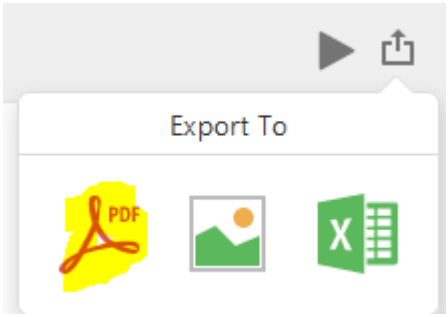
Click on Viewer:

VIEWER

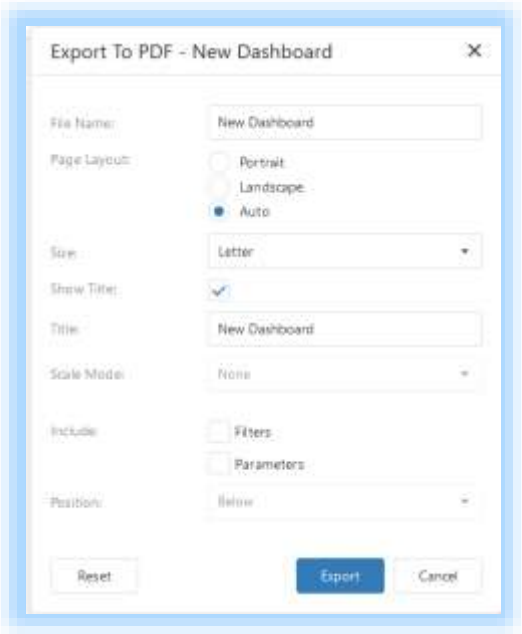
Press *Save*. The dashboard can be viewed by other users of the tenant.

1.12 Export Dashboard to PDF

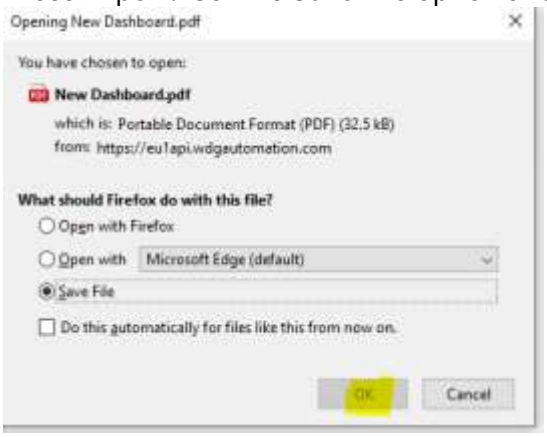
In view mode, click the  icon. This will give you three options to export the dashboard. Choose Pdf:



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.