



Interstage Business Process Manager Analytics V11.0



Dashboard / Output Guide

Windows/Solaris/Linux

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About this Manual

This document describes how to use the Dashboard to display Analytical data.

Intended Audience

This manual is intended for use by system administrators. It assumes that the reader has a working knowledge of the following topic:

- Web Browser operation

This Manual Contains:

Chapter	Title	Description
1	Interstage BPM Analytics Output Overview	Summary of Interstage BPM Analytics presentation capabilities.
2	How Interstage BPM Analytics Works	Descriptions of Interstage BPM Analytics features.
3	Dashboard Presentation Configuration	How to setup a Dashboard using Analytics Studio.
4	Dashboard Display	How to operate a Dashboard to view the analytical data.

Typographical Conventions

The following conventions are used throughout this manual:

Example	Meaning
command	Text, which you are required to type at a command line, is identified by Courier font.
screen text	Text, which is visible in the user interface, is bold .
<i>Reference</i>	Reference material is in <i>italics</i> .
Parameter	A command parameter is identified by Courier font.

Reference Materials

The following reference materials for Interstage BPM Analytics are also available:

- *Release Notes*
- Contains an overview of Interstage BPM Analytics, and late-breaking information that did not make it into the main manuals.
- *Overview*
- Describes the Interstage BPM Analytics Architecture and features.
- *Installation Guide*
- Explains how to install Interstage BPM Analytics.
- *Administration Guide*
- Contains Administration tools and tips, Message references and Troubleshooting.
- *Analytics Studio Guide*
- Explains how to use the Analytics Studio to configure the parameters to enable Interstage BPM Analytics features.
- *Management Console Guide*
- Explains how to use Management Console and Management Commands to configure the core parameters, how to start/stop the Interstage BPM Analytics service and how to display the Interstage BPM Analytics status.

Abbreviations

The following abbreviations are used throughout this document:

Formal name	Abbreviation
Microsoft(R) Windows Server(TM) 2003, Standard Edition Microsoft(R) Windows Server(TM) 2003, Enterprise Edition Microsoft(R) Windows Server(TM) 2003 R2, Standard Edition Microsoft(R) Windows Server(TM) 2003 R2, Enterprise Edition	Windows Server
Microsoft(R) Windows Server(TM) 2003, Standard x64 Edition Microsoft(R) Windows Server(TM) 2003, Enterprise x64 Edition Microsoft(R) Windows Server(TM) 2003 R2, Standard x64 Edition Microsoft(R) Windows Server(TM) 2003 R2, Enterprise x64 Edition	Windows Server 2003(x64), or Windows Server 2003
Microsoft(R) Windows Server(R) 2008, Standard Edition Microsoft(R) Windows Server(R) 2008, Enterprise Edition Microsoft(R) Windows Server(R) 2008 R2 Standard Microsoft(R) Windows Server(R) 2008 R2 Enterprise	Windows Server
Microsoft(R) Windows(R) XP Professional operating system Microsoft(R) Windows(R) XP Home Edition operating system	Windows XP, or Windows
Microsoft(R) Windows Vista(R) Business Microsoft(R) Windows Vista(R) Enterprise Microsoft(R) Windows Vista(R) Ultimate	Windows Vista, or Windows
Microsoft(R) Windows(R) 7 Home Premium Microsoft(R) Windows(R) 7 Professional Microsoft(R) Windows(R) 7 Ultimate	Windows 7, or Windows
Microsoft(R) Internet Information Server Microsoft(R) Internet Information Services	IIS
Microsoft(R) Internet Explorer 6.0 Microsoft(R) Internet Explorer 7.0 Microsoft(R) Internet Explorer 8.0	Internet Explorer
Microsoft(R) Excel	Excel
Solaris(TM) 10 operating system	Solaris 10, or Solaris
Red Hat Enterprise Linux AS Red Hat Enterprise Linux ES Red Hat Enterprise Linux 5	Linux
Interstage Application Server Enterprise Edition Interstage Application Server Standard-J Edition	Interstage Application Server
Interstage Studio Enterprise Edition Interstage Studio Standard-J Edition	Interstage Studio, or Studio
Interstage Business Process Manager	Interstage BPM, or IBPM
Interstage Business Process Manager Analytics	Interstage BPM Analytics, or IBPM Analytics
Oracle Database 10g Enterprise Edition R10.1.0/R10.2.0 Oracle Database 10g Standard Edition R10.1.0/R10.2.0 Oracle Database 10g Standard Edition One R10.1.0/R10.2.0	Oracle10g, or Oracle
Oracle Database 11g Enterprise Edition Oracle Database 11g Standard Edition Oracle Database 11g Standard Edition One Oracle Database 11g R2 Enterprise Edition Oracle Database 11g R2 Standard Edition Oracle Database 11g R2 Standard Edition One	Oracle11g, or Oracle

Formal name	Abbreviation
Microsoft SQL Server 2005 Standard Edition Microsoft SQL Server 2005 Enterprise Edition	SQL Server 2005, or SQL Server
Microsoft SQL Server 2008 Standard Edition Microsoft SQL Server 2008 Enterprise Edition	SQL Server 2008, or SQL Server

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Chapter 1 Interstage BPM Analytics Output Overview

Interstage Business Process Manager (IBPM) allows a business to build a flexible and sophisticated process layer that drives business applications, while at the same time separating process logic from the application logic.

IBPM maintains a history of every event that occurs during the execution of a process. Various attributes are recorded for each event including the type, source, target, timestamp, and the user responsible for the event. All the events are recorded in IBPM's process history (also known as audit data). Users can view this process history from the IBPM Console or Server. However, the scope of this information is limited to data emanating from IBPM itself.

This guide we will focus on Interstage BPM Analytics presentation capabilities.

The area outlined in red below illustrates the position that the presentation capabilities of Interstage BPM Analytics occupies in relation to the rest of the system:

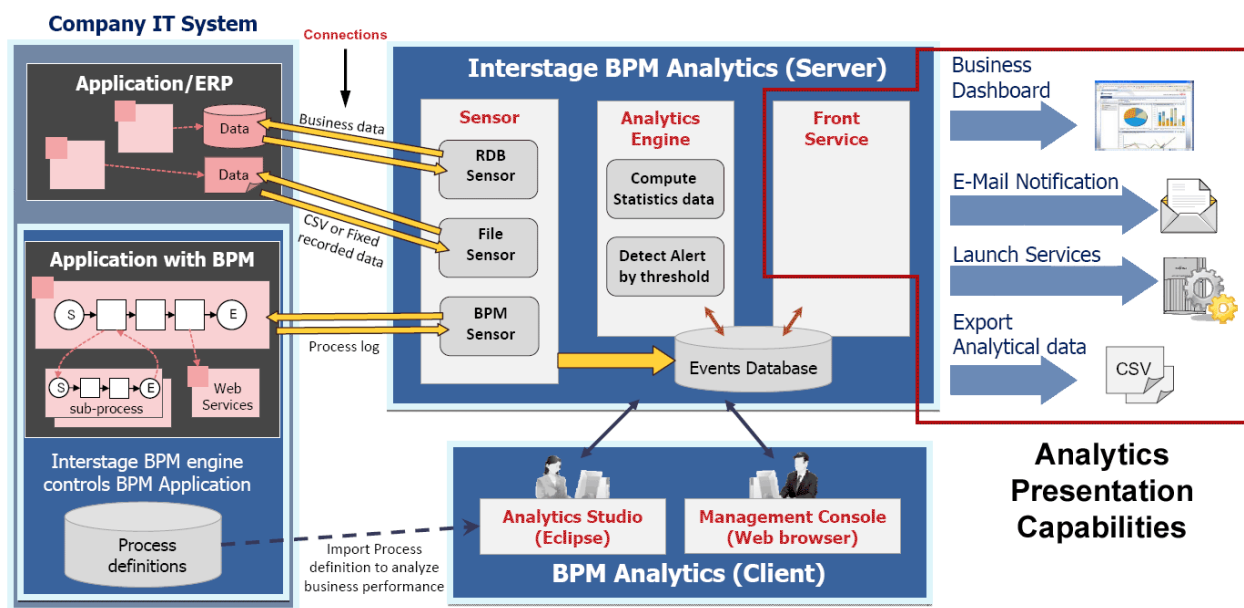


Figure 1 Interstage BPM Analytics Architecture

Interstage BPM Analytics is capable of all three types of information distribution, referred to in the above graphic as Front Service - presentation, actions and distribution. This guide will focus on the Business Dashboard presentation.

Dashboard

The primary presentation tool is the Dashboard, a browser-based graphical display window the contents of which can be largely defined by the user.

The data can be displayed as charts, graphs, KPIs, process diagrams, data tables, etc.

Other Output Options

But data presentation is a broader concept than mere display. Interstage BPM Analytics can also analyze the event data to set triggers for certain actions and it can also be set to automatically distribute data to external destinations via email or to launch other applications.

Chapter 2 How Interstage BPM Analytics Works

This is a three step process:

- Collect Data
- Process and Analyze Data
- Data Presentation

The following discussion will briefly outline how Interstage BPM Analytics accomplishes the first two steps, thereafter the remainder of this guide will focus on the Presentation of data in the Dashboard.

2.1 Event Collection Settings

Event collection is performed by a number of sensors. Once the data is collected it is stored in the Analytics Events Database (DB).

The sensors are defined and their settings configured in the Interstage BPM Analytics Studio. Also, this configuration defines the Event format which consists of a number of attribute names, data formats, etc.

There are three different types of sensors:

Workflow of Interstage BPM Processes

This type of sensor can be configured to retrieve data from the Interstage Business Process Manager and store it in the Events Database.

This configuration is able to start in the Interstage BPM Studio's Analytics menu. Please refer to the Interstage BPM Studio User's guide for information on how to create and setup this type of Analytics sensor.

RDB

This type of sensor can be configured to retrieve data from one or more relational databases and store it in the Events Database. Different sensor settings apply for databases in which records are added to the database and those in which records are updated.

RDB Sensors can also be set to merge data from separate tables or to compare data from one table with data from a master table.

The sensor can also be set to determine how the data is stored in the Analytics Events Database, which in turn can assist the Analytics Engine as it calculates results to be output to the monitoring functions of the Interstage BPM Analytics front service.

Text Files

Text file sensors can be set using the Connection Wizard's collection task definition to specify the file from which data is collected, and the position of the data in the file. The event definition can specify information and parameters, such as the item names and data types, required for the data to be collected and stored in the Events Database. These settings can apply to files with fixed names or rotating names.

Text file sensors can also collect data from all of the files in a particular directory and store this data in the Events Database.

Collection Scheduling

For all of the above sensors, the schedule of collection, or specific conditions that must be met before collection, can be set at stage 4 - Schedule, of the Analytics Studio's Connection Wizard.

2.2 Analytics Engine Settings

The Analytics Engine performs rule-based calculations on events stored in the Event Database using sensors that register new events and generate alerts.

The Analytics Engine is configured using the Interstage BPM Analytics Studio's Calculation Table Wizard and other settings available in the Editor. The Analytics Engine settings relate to event management in the Events Database, event calculation, and alert triggers.

Calculation Rules

Calculation rule settings are used to set calculation rules and to set the target data range.

For example, a rule can be set to obtain the average sales figure for each week. Calculation results are stored as a calculation result destination event in the Events Database.

There are two types of Calculation rules: General or Workflow

The **Input** parameters of **Calculation Rules** specify the events that will be subject to calculation.

For Statistical Events, **Output** rules can be set.

The Calculation Schedule is defined on each definition of Calculation table wizard operation.

Alert Rules

Alert rules are used to evaluate alert information.

An example alert rule could be “sales less than 5 thousand dollars”. When sales during the scheduled period are less than \$5,000, the alert message “sales are getting too low” is generated and the alert information will be stored as an event in the Event database.

Alert settings consist of Rule types, with subordinate Rule Details:

Rule Type	Rule Detail
Check Parameter	Parameters for general events
	Parameters for workflow events
Check Behavior of Workflow	Time limit
	Wait Time
	Generation of Event
Check Relation of Pair Event	General events
Check Parameter between Pair Event	Parameters for general events
	Parameters for workflow events
Check performance of Workflow	Unit of Process
	Unit of Activity

The rules can be further defined, and the settings can be simple or detailed.

Detailed settings allow a function or expression to be created.

Escalation Function Settings

Escalation is a function to automatically deliver mail or to execute system calls when an alert occurs.

Escalation settings determine what sort of messages will be sent to which systems when a particular alert occurs.

Escalation is set up by defining Action Templates and message transmission settings in relation to alert rules defined by the Analytics Server settings. These settings specify where mail, or messages in the case of system calls, are sent when an alert is generated, as well as specifying system connection destinations and the content of transmitted messages.

Action Templates

An Action Template defines the content of data delivered to each system when an alert occurs. Variables can be embedded into Action Templates to report specific information about an alert.

An Action Template specifies the basic format of the message content sent to each system. Escalation is carried out when an alert occurs, and alert information is embedded as variables within the template. When messages are sent, the information in the variables is changed according to the content of the alert.

Message Transmission Settings

Message transmission settings define the parameters that are needed for message transmission. For example, in the case of a mail message, an e-mail address would be specified as a parameter. Multiple mail addresses can be defined in the message transmission settings to notify multiple users simultaneously when an alert occurs.

To send mail, it is necessary to set up the mail transmission environment using the Management Console.

If escalation is to be performed when an alert is generated by a calculation event, it is necessary to make allowance for the interval of the calculation schedule. If the scheduled calculation interval is short, there may not be enough time for the action initiated by one escalation to be applied before the next calculation and alert occurrence, leading to multiple escalation executions. In such cases, it will be necessary to adjust the calculation interval setting to avoid multiple executions.

Message transmission settings specify such things as the information needed to connect to each system and the Action End Point addresses. They also define the process settings relating to transmissions, such as authentication information needed for sending a message, the operation of the system that receives the message, process result display settings, etc.

Escalation Settings

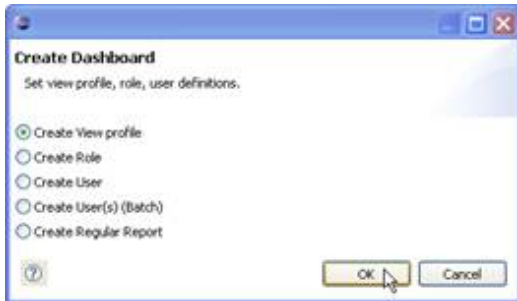
Escalation settings relate to the Action Templates and message transmission settings described above. These determine which messages should be sent to which systems.

A single escalation setting can define multiple alerts and multiple relationships between Action Templates and message transmission settings.

Chapter 3 Dashboard Presentation Configuration

All result presentation formats can be initially defined using the Create Dashboard Wizard.

Open the Analytics Studio's Wizard launcher and click on the **Presentation** command to open the following selection dialog:



All the settings necessary for a new presentation can be accessed via this dialog.

The five options on the **Create Dashboard** selection dialog direct users to define the components in a view, define Roles and Users, or to define a report.

3.1 Create View Profile - Wizard

- [1] **Select display data source(s)**
- [2] Select role(s)

The Create View Profile selection leads to a two-step Wizard.

These steps provide the foundation for defining what the Dashboard display will actually look like.

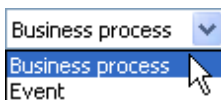
In these two steps the data sources to be used are selected, then the display types and finally the roles that have access to the view are defined.

A green bar indicates which step you are currently completing.

Step 1 - Select display data source(s)

The first step is to give the **View Profile** a name.

Specification type



Next, a specification type must be selected. This will determine from where the data originated, which in turn will determine what will be able to be displayed.

A Business Process is an activity that is monitored by the Interstage Business Process Manager. Business processes are defined in IBPM Studio.

An Event is an ordinary event, defined at Step 7 of the Analytics Studio's Create Connection Wizard and is stored in the Events Database.

Select Process

If Business process is selected, select a **Business Process** from the **Available Business Processes** group on the left and click on the [>>] button to add it to the **Selected Business Processes** on the right.

Those processes in the list on the right will be included in the display or output.

To exclude a process from the display or output, select it in the **Selected Business Processes** group and click the [<<] to remove it from the group.

Select Event

If Event is selected, select an Event from the **Available events** group on the left and click on the [>>] button to add it to the **Selected events** on the right.

Those events in the list on the right will be included in the display or output.

To exclude an event from the display or output, select it in the **Selected events** group and click the [<<] to remove it from the group.

Step 2 - Select role(s)

Select the roles that can access this View Profile.

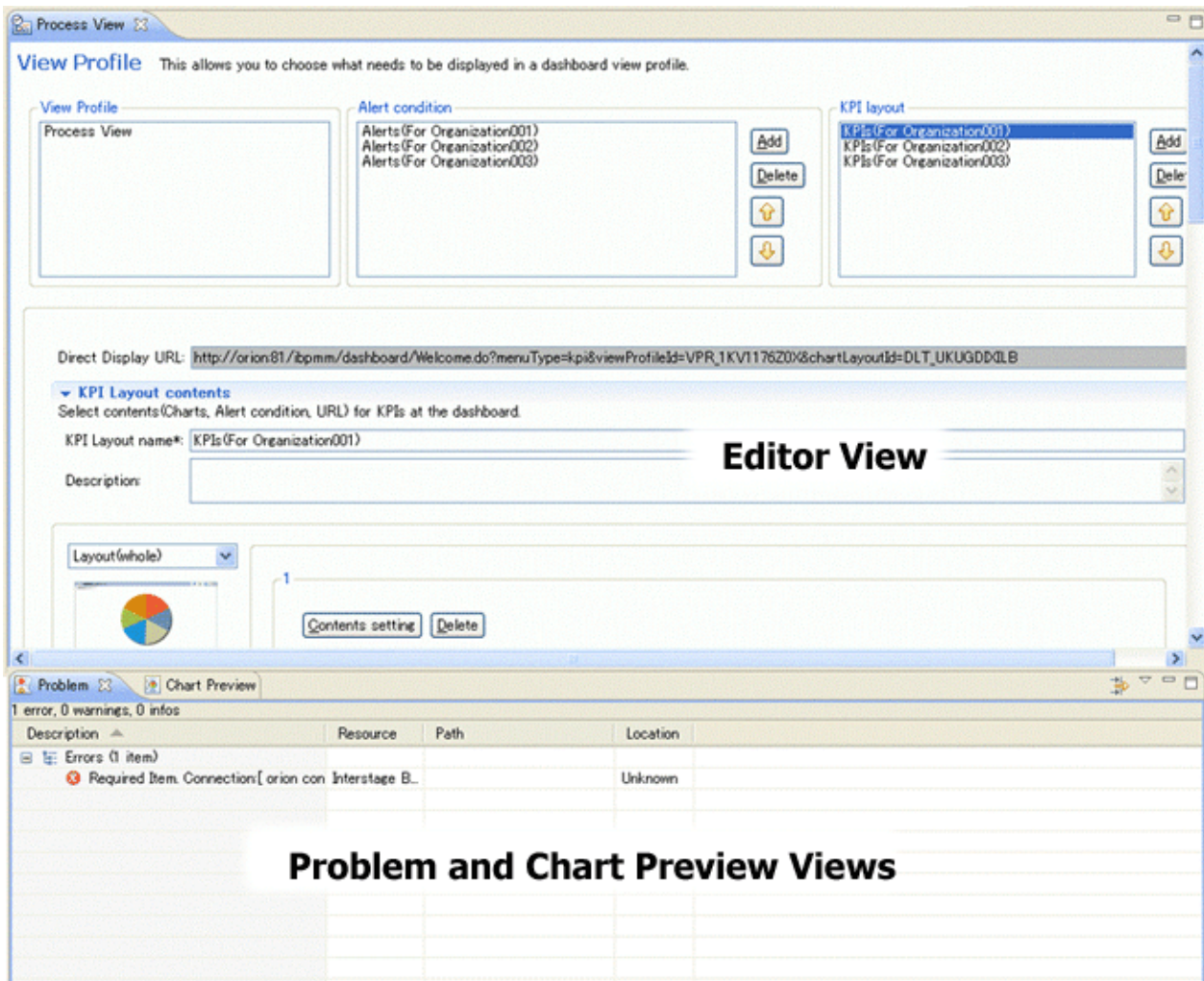
Roles have users associated with them.

Selecting a Role will allow all users associated with that role to access the View Profile.

More than one Role can be associated with each View profile.

3.2 View Profile - Editor View

Once the **View Profile** has been created using the Wizard, its settings can be reviewed and adjusted in the **Editor View** work area.



The work area has two parts, the **Editor View** area and the **Problem/Chart Preview View** area.

Editor View Area

This area shows the View Profile's parameters. Initially these are populated with the following two types of values:

- user defined values which specified using the Wizard
- default values which are created in the background by the Wizard

Once created, the user can open the View Profile in the Editor View and update any of the View Profile's parameters.

View Profile Details

The **Alert Condition and KPI layout** settings were previously set using the Wizard.

These settings can be altered using the **Add/Delete** buttons.

The **View Profile** name can also be changed in this view, and a **Description** of the View Profile can be added.

Scope for View

In Step 1 of the View Profile Wizard, the Scope for View (either Business process or Event) had been set, and Business Processes or events (depending on which type was specified) have been designated to be included in or excluded from the View Profile.

Change Elements

To change the array of elements available for display select and **Add** or **Remove** the **Business Process** or **Events** to or form the **Selected** group (on the right) from the **Available** group (on the left).

Change Scope for View

The Scope for View restricts the Available elements which could be included in the View Profile to those available for that type.

To include those elements in the View Profile, change the **Scope for View** and then use the same **Add** or **Remove** procedure to make the required elements available in the View Profile.

Problem and Chart Preview View Area

As you make changes to the View Profile, the results of these changes can be previewed and analyzed in the **Problem** and **Chart Preview** View Area in the lower view panel.

Chart Preview

The Chart Preview tabbed page shows how the View Profile's current settings will appear as a dashboard.

If you are not satisfied with the current result, make changes in the editor, then save the changes and see if they are satisfactory using the Chart Preview.

Problem

The **Problem** tabbed page contains two groups: Errors and Warnings.

Errors

The **Errors** group contains more serious issues, some of which may result in the View Profile not being able to display its content.

Examples of these issues include:

Error Example	Remedial Action
• Enter the JDBC URL for Connection [Sensor connection].	Input JDBC URL for target system
• Please set the Extraction item to attribute [Cost] of the event of Collection Condition [Sales data].	Input the Extraction item to attribute.
• The Condition for the Alert rule [Alert] is incorrect. Condition [([Area] eq) and ([Ave of Price] i.e. 1000000)]	Input condition for alert.

Warnings

The **Warnings** group contains less serious issues.

Examples of these issues include:

Warning Example	Remedial Action
• Set the Alert message. Alert [Alert]. Language [English].	Input the alert message for English locale

3.3 Access Settings for Dashboard

Roles/Users

Access rights to the Dashboard cannot be assigned to individual users. To assign rights, first define roles and then associate users with these roles.

Roles

Dashboard users must be assigned access rights for the Dashboard via predefined "roles".

Roles are defined in the Create Dashboard Wizard, by selecting Create Role in the first dialog box.

Different roles can give access to different parts of the Dashboard or different view profiles.

There is one "guest role" per system. Users that do not specifically belong to any other roles belong to the guest role. A user cannot belong to the guest role and another role at the same time.

Use the guest role in situations such as when there are many users that do not belong to roles and who need to be able to use only some Interstage BPM Analytics functions.

Associating Roles with View Profiles

View profiles must be defined in advance.

Associate Roles with View Profiles.

Roles can be assigned more than one view profile.

Users

Users are defined in the Create Dashboard Wizard, by selecting Create User in the first dialog box.

Account Management

Dashboard users are defined by “Create Role”, “Create User” or “Create User(s) (Batch)” functions of the Analytics Studio's Create Dashboard Wizard.

Each Dashboard has Roles which can access it.

Each Role has users which are assigned to it. Roles have multiple users, and users can be assigned to more than one Role.

Chapter 4 Dashboard Display

The Dashboard display is defined in the Interstage BPM Analytics Studio using the Create Dashboard Wizard's Create View Profile tools.

Five different types of displays can be included in each View Profile:

- Overview
You can see the summary of your business; alerts and KPI.
- Alerts
You can monitor Analytics Alerts.
- KPI
You can see the each KPIs as a chart of your business.
- Process Performance
You can monitor or analyze the Process performance.
- Search
You can search alerts, processes and comments.

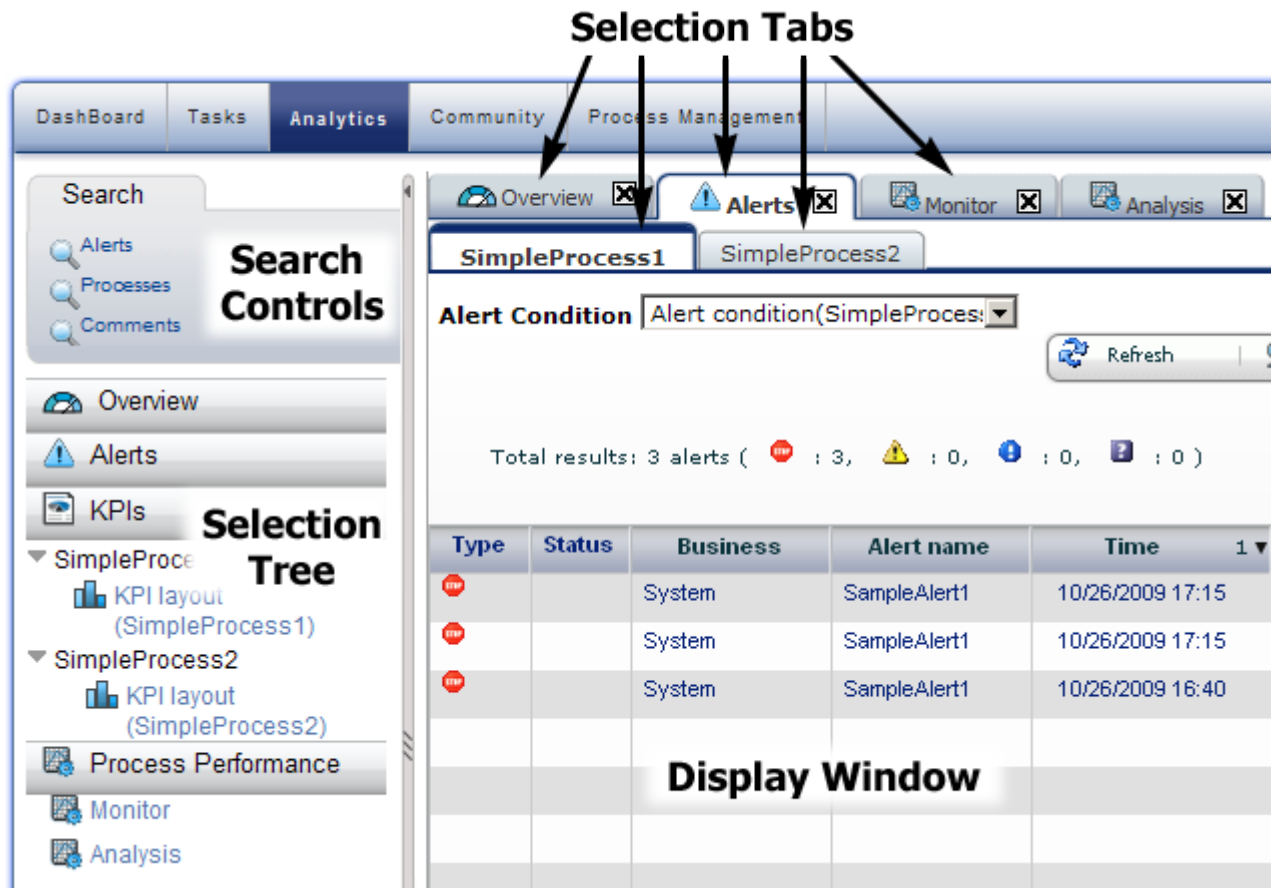
Thereafter the precise content of the View Profile is entirely customizable.

When the Dashboard is initially opened, the Overview Page will display by default.

Each Role can contain an Overview page.

Viewing a Dashboard Element

All of the elements included in the View Profile will be displayed in the selection tree at the left.



Select and element in the tree and click. If there are sub-elements, they will expand below.

The tabbed page will open in the Display Window on the right.

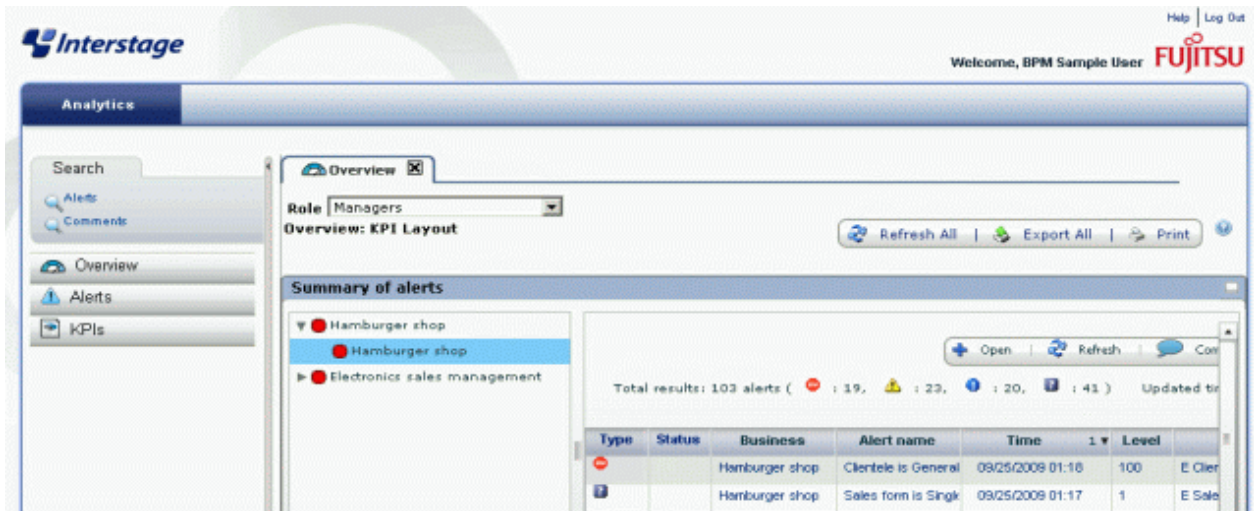
More than one tabbed page can be open at one time. Click on a tab to bring its contents to the top of the Display Window.

Some tabbed pages have sub-tabs, click on these to access the information contained.

4.1 Overview - Display

The Dashboard Overview display is represented by the  icon. The icon appears on the tab of each overview tabbed pane.

The following is a typical **Dashboard Overview** display:



The contents of the Overview can contain any of the elements previously defined and displayed in the Definition Tree View of the Analytics Studio.

The exact content of the Overview page is defined in the Role definition settings screen in the Analytics Studio.

Only one Overview page can be defined for each View Profile.

Overview toolbar

The following toolbar is on the Overview page:



Its functions are:

Refresh All

Click **Refresh ALL** to retrieve current data from the Events Database.

Export All

Click this button to save CSV file report at the local machine for displayed charts in the Overview.


Print

Click this button to display Windows print dialog to print this page.

Help

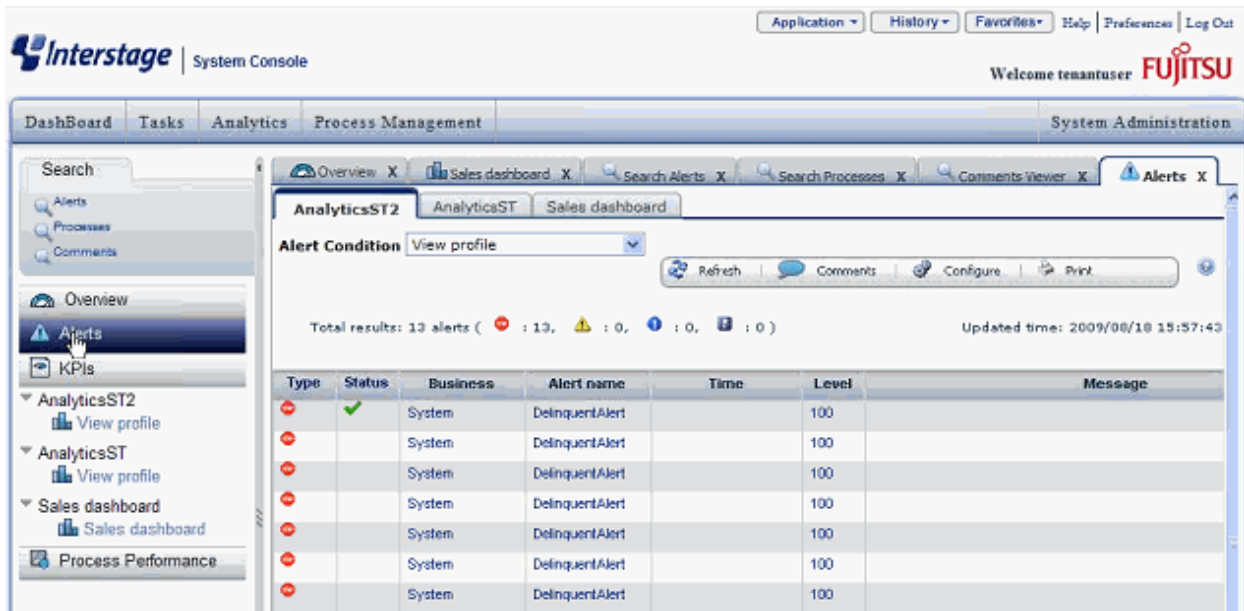
Click this button to get help on this functionality.

4.2 Alerts - Display

The Dashboard Alerts display is represented by the  icon or search Alerts results. It appears on the tab of each overview tabbed pane. It can be Red, Yellow, Blue or Gray:

- A Red Alerts icon indicates a Critical alert.
- A Yellow Alerts icon is a Warning alert.
- A Blue Alerts icon is an Information alert.
- A Gray Alerts icon means that the reason for the alert is unknown.

The following is a typical **Dashboard Alerts** display:



Alerts are defined in the Interstage Analytics Studio and once defined, are displayed in the Definition Tree.

Individual Alerts are selected for inclusion in View Profiles using the Active Function checkboxes in the Crate Dashboard Wizard.

Alerts toolbar

The following toolbar is on the Alerts page:



Its functions are:

Refresh

Click Refresh to retrieve current data from the Events Database.

Comments

Click to open a comments dialog.

Comments can be added to each selected Alert.

User can add/refer/delete comment at the comments dialog.

Alert status also can be changed at the comments dialog.



Configure

Click on this command to open the Configuration dialog box.

This tool is used to change the table column or filter alerts results in the Alert results tables.

Print

Click this button to display the Windows print dialog to print this page.

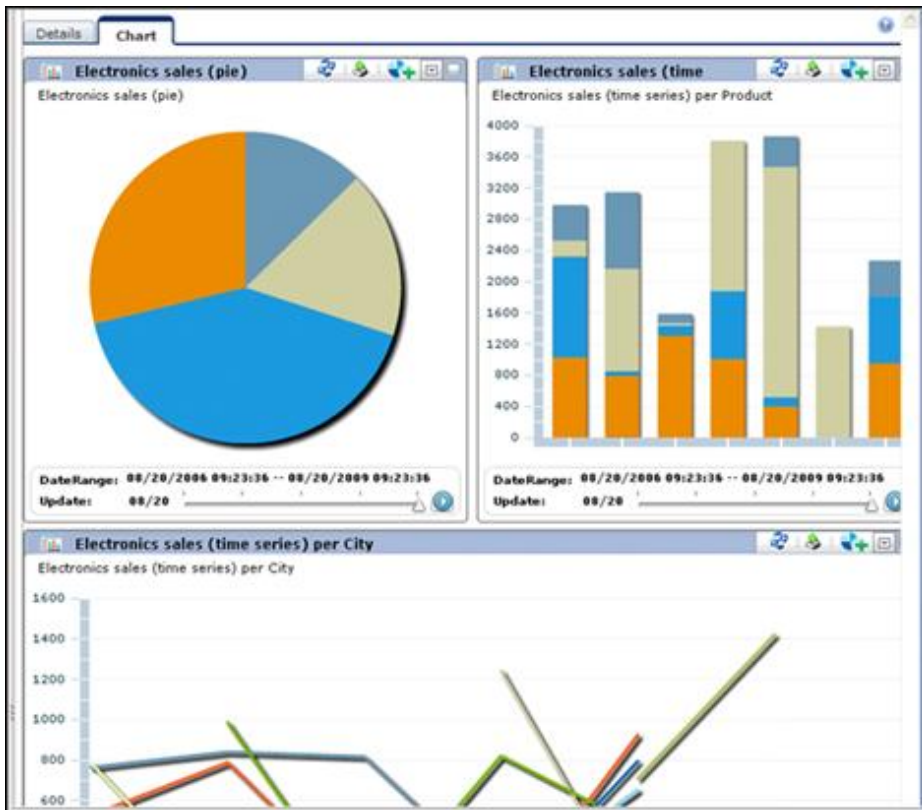
Help

Click this button to get help on this functionality.

4.3 KPIs - Display

The Dashboard KPIs display is represented by the  icon. It appears on the tab of each overview tabbed pane.

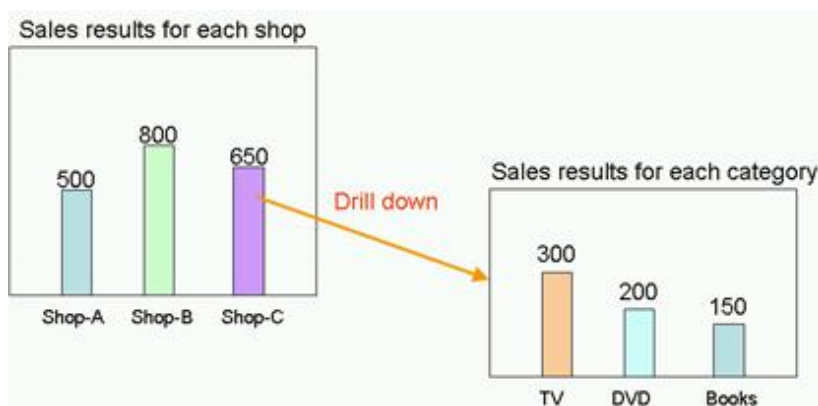
The following is a typical Dashboard KPIs display:



KPI chart has the following functionalities.

- Change data table/chart
You can switch chart and data table by clicking the top left chart icon.
- Drilling down in Charts
You can drill down the chart to see more details information.

Example:




First user creates the “Sales results for each shop” chart.

Next, user creates the “Sales results for each category” chart under the first chart.

After the user uploads these chart definitions to the Analytics server, the user will see “Sales results for each shop” chart at the KPI view.

When user clicks one of data columns in the parent chart (“Sales results for each shop”), the chart area will be change to the child chart (“Sales results for each category”).

4.4 Process Performance - Display

The Dashboard Process Performance display is represented by the  icon. It appears on the tab of each overview tabbed pane.

There are 2 modes of Process Performance.

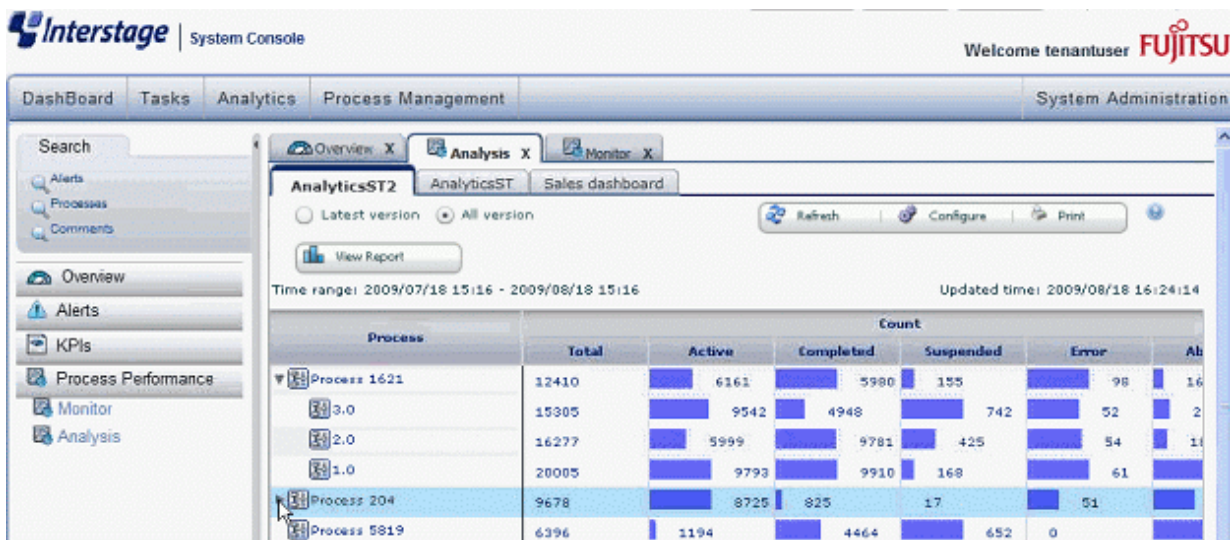
- Monitor

This mode displays statistics for processes that are currently active.

- Analysis

This mode displays statistics for processes that were started during a specified period.

The following is a typical Dashboard Process Performance display:



Process Performance toolbar

The following toolbar is on the Process Performance page:



Its functions are:

View Report

Click View Report to open KPI chart related with the process performance.

View Activity

Click View Activity to show the statistics results of the selected Activity for each Aggregation and User.

View subprocesses

Click View subprocesses to show the statistics results of the selected sub processes.

Refresh

Click Refresh to retrieve current data from the Events Database.

Configure

Click on this command to open the Configuration dialog box.

This tool is used to change the table column in the Process Performance table.

Print

Click this button to display the Windows print dialog to print this page.

Help

Click this button to get help on this functionality.

Performance Details

Performance Details show the following contents.

- Process status
It shows the Frequency of alerts/delay alerts for each process and the Current number of processes for each process.
- Diagram
It shows the Process diagram of the selected Process.
- Amount
It shows the number of alerts/delay alerts of the selected process/activity.
- Alerts, Delay
It shows the frequency of alerts/delay alerts for the selected process/activity.
- Processing time
It shows the lead time, work time and wait time for the selected process/activity.
- Others
It shows the frequency of take back for the selected activity.
- Process list
It shows the process list of the selected process.

4.5 Search - Display

The Dashboard Search function is represented by the  icon. It appears on the tab of each Search tabbed pane.

Types of Search Available

Three search types are available in the Dashboard:

Alerts

New tab is displayed and user can search Alerts.

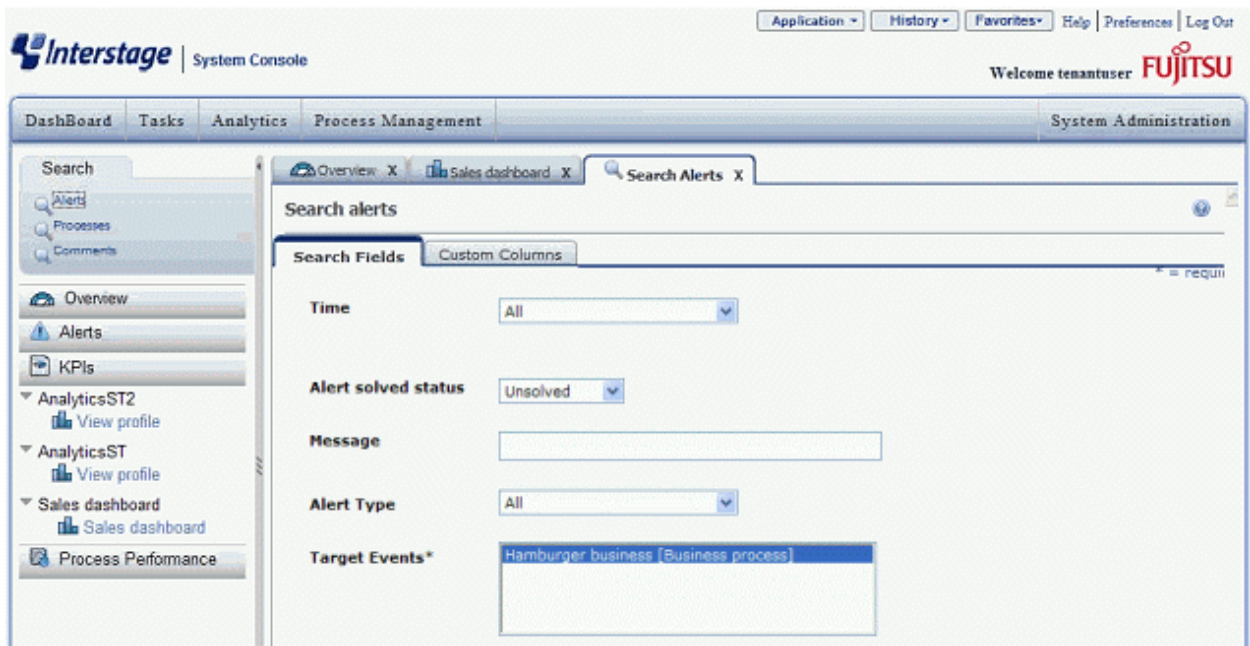
Processes

New tab is displayed and user can search Process instance.

Comments

New tab is displayed and user can search comments which are added to Alerts, Charts and Process.

The following is a typical Dashboard Search display for an Alerts Search:



Using the Search Function

The login user can use the Search Alerts function to find important alerts.

Examples of Alerts that can be searched for include: “Sales under threshold” or “Process XX was delayed”.

Managers will be able to identify important alerts, and take the appropriate action for that alert.

The Search function is designed to find processes which have some problem, delay or other issues.

Users can filter the processes by their **Process Status** (either **Active**, **Completed**, **Suspended**, **Error** or **Aborted**) or **Alert Status** (either **Critical**, **Warning**, **Info** or **Unknown**), so he will find processes with some problems.

The Search Comments function is used to share or reference the tracking of Comment messages which can be added to each Analytics Alerts/KPI chart/Process instance.

Managers will be able to monitor how many comments are added and review the comments' details for each Alerts/KPI chart/Process instance. Managers may be able to identify issues and increase their knowledge by referring to the comments.