



ARIS CONNECT CONFIRMATION MANAGEMENT DASHBOARD INSTALLATION

VERSION 10.0 - SERVICE RELEASE 14

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This document applies to ARIS Version 10.0 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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1 Introduction

The **Confirmation management** dashboard shows an overview of objects and workflows of Confirmation Management, such as confirmation processes and confirmations. Since the dashboard uses data from ARIS Risk & Compliance Manager, it only works if ARIS Risk & Compliance Manager is properly installed.

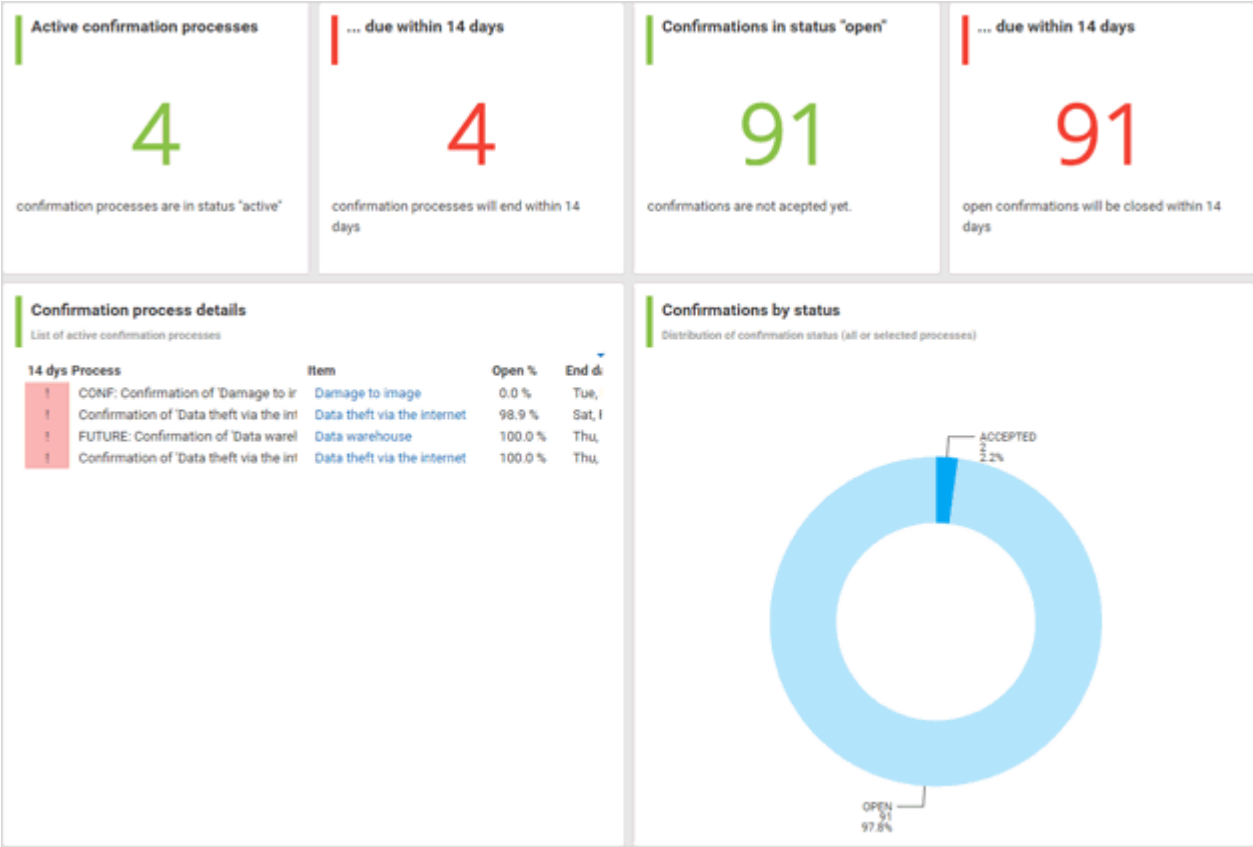
To make the dashboard available in ARIS Connect, follow the instructions in this manual. For detailed information on dashboards, refer to the **ARIS Aware online help**, the **ARIS Aware Guide**, or contact Software AG or the sales partner responsible.

2 'Confirmation management' dashboard content

The **Confirmation management** dashboard uses data from ARIS Risk & Compliance Manager. This dashboard provides an overview of different indicators and objects of the current user's confirmation processes as well as the related confirmations. The **Confirmation management** dashboard contains the following charts:

Chart	Content
Active confirmation processes	Displays the number of confirmation processes of the current user with the Active status.
Processes due within 14 days	Displays the number of confirmation processes of the current user with the Active status that are due within the next 14 days.
Confirmations in status 'Open'	Displays the number of confirmations with the Open status that are related to the confirmation processes of the current user with the Active status.
Confirmation due within 14 days	Displays the number of confirmations with the Open status that are related to the confirmation processes of the current user with the Active status that are due within the next 14 days.
Confirmation process details	<p>Displays details of the confirmation processes of the current user with the Active status:</p> <ul style="list-style-type: none"> ▪ 14 days Displays an exclamation mark (!) if the process is due within the next 14 days. ▪ Process Shows the name of the confirmation process. ▪ Item Shows the name of the ARIS item that is related to the confirmation process. To open the item, click the name. ▪ Open % Shows the percentage of confirmations with the Open status that are related to the confirmation process. ▪ End date Shows the end date of the confirmation process.
Confirmations by status	Displays the distribution by status of assigned confirmations of all confirmation processes or the selected confirmation process.

Example




3 Provide 'dashboard_viewers' user group and 'Feed URL' alias

Dashboard availability is based on the standard configuration of ARIS Connect. The following items are required to view the dashboards. For detailed information, refer to **ARIS Connect Administrator User Manual** or contact your ARIS administrator.

DASHBOARD_VIEWERS USER GROUP

The permission to view the dashboards is assigned to the **dashboard_viewers** user group. Therefore, make sure that this user group is available in ARIS Administration. For detailed information on how to manage user groups, refer to **Manage user groups** in the ARIS Connect help. For detailed information on dashboard permissions, refer to **Manage dashboard permissions** in the ARIS Connect help.

Procedure

1. Start ARIS Connect.
2. Log in as **system** user.
3. Open ARIS Administration.
4. Click  **User management** and select **User groups**. The list of user groups opens.
5. Check if the **dashboard_viewers** user group is displayed in the list. If not, create the **dashboard_viewers** user group. You must use exactly this name, to make sure the dashboards are displayed to the assigned users. If a user group that already exists in the LDAP system is created, the user group names must match. This is the only way to assign an existing ARIS user group with the LDAP user group.
6. Assign all users which should be able to display the dashboard.


The **dashboard_viewers** user group is available.

The users who should be able to view the dashboard must have at least the **ARIS Connect Viewer** and **ARIS Aware** license privilege. The privilege can be assigned directly to the user or via the user group. For detailed information on privileges and roles regarding dashboards, refer to **Who can use or manage dashboards?** in the ARIS Connect help.

FEED URL ALIAS

If you use an alias, you do not have to enter the entire URL, but only the path to the location where the data is stored. The **Feed URL** alias is required by the dashboards to retrieve the dashboard data.

Procedure

1. Start ARIS Connect.
2. Log in as **system** user.
3. Open ARIS Administration.
4. Click  **Configuration**.
5. Click **Dashboards**.

6. Check if the **Feed URL** alias is displayed in the list.
7. If not, create the **Feed URL** alias. You must use exactly this name, to make sure the dashboards are displayed to the assigned users. For detailed information, refer to **Add an alias URL for dashboards** in the **ARIS Connect Administrator User Manual** or the ARIS Connect help.

The **Feed URL** alias is available.



4 Import Confirmation management dashboard and data feeds

Import the **Confirmation management** dashboard and the data feeds to make the dashboard available in ARIS Connect.

Prerequisites

- ARIS Connect and ARIS Risk & Compliance Manager are available.
- Since the dashboard uses data from ARIS Risk & Compliance Manager, it only works if ARIS Risk & Compliance Manager is properly installed.
- The **system** user has all required privileges. (The **system** user has all required privileges by default, unless an administrator revoked the privileges.) Make sure you have the **Dashboard administrator** function privilege.
- You have access to the dashboard files of **Confirmation_Dashboards_Feeds.zip** (**Content\ARIS Aware** folder of the ARIS installation medium).

Procedure

1. Start ARIS Connect.
2. Log in as **system** user.
3. Click  **Repository**.
4. Click **Dashboards & Data feeds**.
5. Click  **Import**. The corresponding dialog opens.
6. Click **Select import file**.
7. Navigate to the directory in which the dashboard files are stored.
8. Click the **Confirmation_Dashboards_Feeds.zip** file. The file is in **ZIP** format and contains the dashboards and the relevant data feeds. The file also includes the dashboard permissions.
9. Click **Open**. The **File upload** dialog is closed.
10. To replace the dashboards available in the repository, enable **Overwrite if already exists**.
11. To import the dashboard permissions contained in the dashboard file, enable **Import privileges**. This option is activated by default.
12. Click **Import**.

The **Confirmation management overview** dashboard and the related data feeds are imported. The dashboards are displayed in  **Dashboards** ( **Repository** > **Dashboards & Data feeds**). The data feeds are displayed in  **Data Feeds** ( **Repository** > **Dashboards & Data feeds**).

Now, add the **Dashboard** component to the portal.





5 Add 'Dashboard' component



Add the  **Dashboards** component and the **Confirmation management** dashboard to  **Portal > Home**.

Prerequisite

- An activated custom modification set is available.
- You have the **Portal administrator** function privilege.

Procedure

1. Start ARIS Connect.
2. Log in as **system** user.
3. Click your name > **Administration**. The **ARIS Administration** opens.
4. Click **Portal > Manage configuration sets**. All available configuration and modification sets are displayed. The current configuration or modification set is marked as **(active)**. You can edit custom modification sets only.
5. Move the mouse pointer over the relevant modification set and click  **Edit**. The **Define modification set** page opens and you can edit the modification set.
6. Click **Home**. The components are displayed for the selected layout.
7. Select a layout. The **System** layout is selected by default. If you keep this layout, proceed with step 11, since all components are available for the **System** layout by default. The **System** layout cannot be changed. If you select another layout, proceed with the next step to add the **Dashboards** component.
8. Click **Add** under **Components > Define components for this section**. The **Add component** dialog opens.
9. Click the **Component** box and then click **Dashboards**.
10. Click **Add**. The dialog closes and **Dashboards** is added under the components of the section.
11. Move the mouse pointer over the **Dashboards** row and click  **Edit**. The **Edit dashboards** dialog opens.
12. Click **Add**. The **Add Dashboard** dialog is displayed.
13. Enter a name for at least one language and the default language. For example, **Confirmation management**.
14. Select the **Confirmation management overview** dashboard.
15. Click **Add**.
16. Click **OK**.
17. Click  **Back**. The **Application management** page is displayed.
18. Activate the modification set if not already activated.
 - a. Move the mouse pointer over the modification set.
 - b. Click  **Activate**. The modification set is marked as **(active)**.

The **Confirmation management** dashboard is now displayed in  **Portal > Home >  Dashboards** to the users assigned to the **dashboard_viewers** user group. For detailed information on how to configure ARIS Connect, refer to the **ARIS Connect Administrator User Manual** or the ARIS Connect help.

6 Legal information

6.1 Documentation scope

The information provided describes the settings and features as they were at the time of publishing. Since documentation and software are subject to different production cycles, the description of settings and features may differ from actual settings and features. Information about discrepancies is provided in the Release Notes that accompany the product. Please read the Release Notes and take the information into account when installing, setting up, and using the product.

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