# software AG

## ARIS CONNECT

# CONFIRMATION MANAGEMENT DASHBOARD INSTALLATION

VERSION 10.0 – SERVICE RELEASE 16

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# Contents

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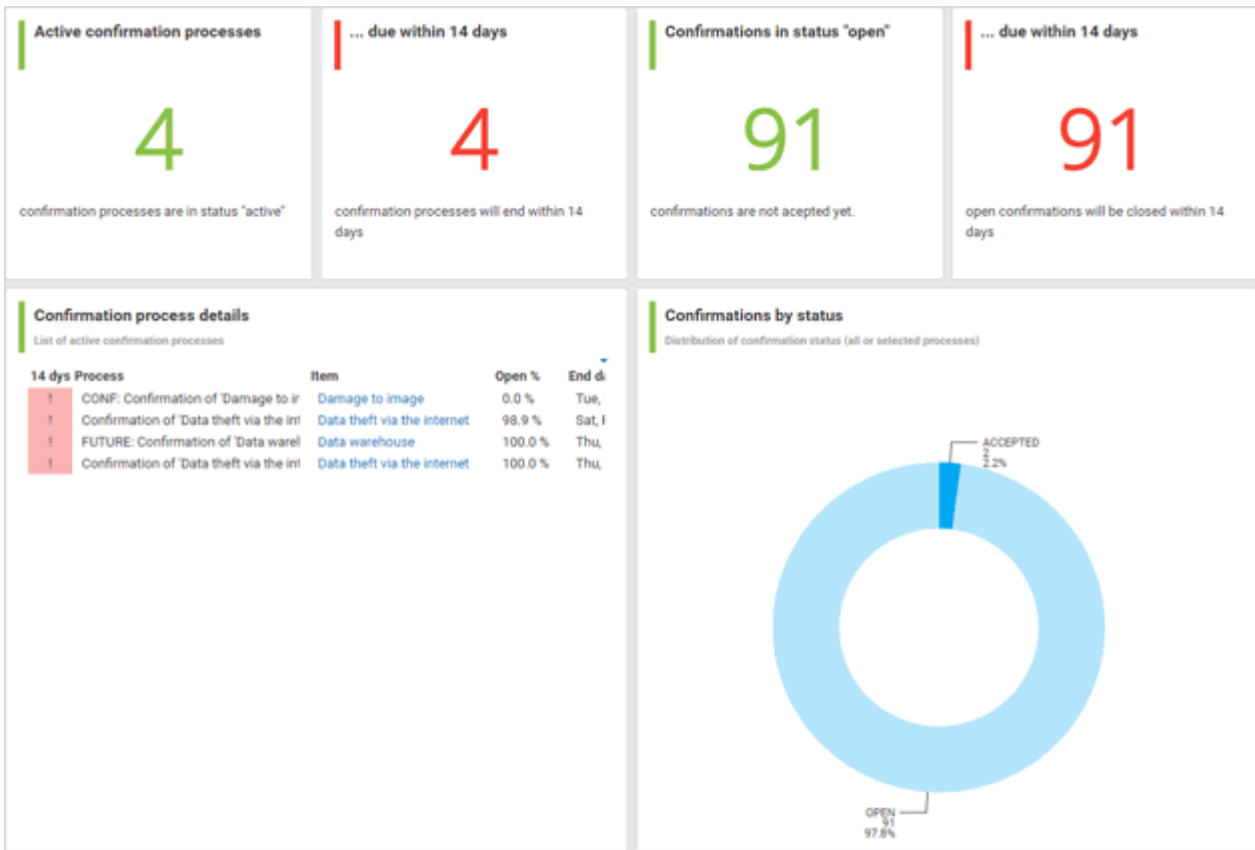
To make the dashboard available in ARIS Connect, follow the instructions in this manual. For detailed information on dashboards, refer to the **ARIS Aware online help**, the **ARIS Aware Guide**, or contact Software AG or the sales partner responsible.

# 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** | Displays details of the confirmation processes of the current user with the **Active** status: <br> ▪ **14 days** <br> Displays an exclamation mark (**!**) if the process is due within the next 14 days. <br> ▪ **Process** <br> Shows the name of the confirmation process. <br> ▪ **Item** <br> Shows the name of the ARIS item that is related to the confirmation process. To open the item, click the name. <br> ▪ **Open %** <br> Shows the percentage of confirmations with the **Open** status that are related to the confirmation process. <br> ▪ **End date** <br> 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

| Active confirmation processes | ... due within 14 days | Confirmations in status "open" | ... due within 14 days |
|---|---|---|---|
| **4** | **4** | **91** | **91** |
| confirmation processes are in status "active" | confirmation processes will end within 14 days | confirmations are not acepted yet. | open confirmations will be closed within 14 days |

**Confirmation process details**
List of active confirmation processes

| 14 dys | Process | Item | Open % | End d: |
|---|---|---|---|---|
| ! | CONF: Confirmation of 'Damage to ir | Damage to image | 0.0 % | Tue, |
| ! | Confirmation of 'Data theft via the int | Data theft via the internet | 98.9 % | Sat, I |
| ! | FUTURE: Confirmation of 'Data warel | Data warehouse | 100.0 % | Thu, |
| ! | Confirmation of 'Data theft via the int | Data theft via the internet | 100.0 % | Thu, |

**Confirmations by status**
Distribution of confirmation status (all or selected processes)

ACCEPTED
2
2.2%

OPEN
91
97.8%

# 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. Click ⸬ **Application launcher >** ⚙ **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 ⋮⋮⋮ **Application launcher >** ⊕ **Dashboards & Data feeds**. The dashboards are displayed.

4. Click ⊡ **Import.** The corresponding dialog opens.

5. Click **Select import file.**

6. Navigate to the directory in which the dashboard files are stored.

7. 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.

8. Click **Open**. The **File upload** dialog is closed.

9. To replace the dashboards available in the repository, enable **Overwrite if already exists**.

10. To import the dashboard permissions contained in the dashboard file, enable **Import privileges**. This option is activated by default.

11. Click **Import**.

The **Confirmation management overview** dashboard and the related data feeds are imported. The dashboards and data feeds are displayed in ⋮⋮⋮ **Application launcher >** ⊕ **Dashboards & Data feeds**.

Now add the **Confirmation management** dashboard to ⋮⋮⋮ **Application launcher >** ▦ **Dashboards**.

# 5      Add the 'Confirmation management' dashboard

Add the **Confirmation management** dashboard to ⠿ **Application launcher >** 🖼
**Dashboards**.

**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 ⠿ **Application launcher >** ⚙ **Administration**. ARIS Administration opens.

4.  Click **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 **Components**.

7.  In the **Dashboards** row, click ✏ **Edit**. **Dashboards – Edit component** opens.

8.  Click **Add**. The **Add Dashboard** dialog is displayed.

9.  Enter a name for at least one language and the default language. For example,
    **Confirmation management**.

10. Select the **Confirmation management overview** dashboard.

11. Click **Add**.

12. Click 🔙 **Back** until the **Configuration and modification sets** page is displayed.

13. 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 ⠿ **Application launcher >**
🖼 **Dashboards**. 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.

If you want to install technical and/or business system functions without using the consulting services provided by Software AG, you require extensive knowledge of the system to be installed, its intended purpose, the target systems, and their various dependencies. Due to the number of platforms and interdependent hardware and software configurations, we can describe only specific installations. It is not possible to document all settings and dependencies.

When you combine various technologies, please observe the manufacturers' instructions, particularly announcements concerning releases on their Internet pages. We cannot guarantee proper functioning and installation of approved third-party systems and do not support them. Always follow the instructions provided in the installation manuals of the relevant manufacturers. If you experience difficulties, please contact the relevant manufacturer.

If you need help installing third-party systems, contact your local Software AG sales organization. Please note that this type of manufacturer-specific or customer-specific customization is not covered by the standard Software AG software maintenance agreement and can be performed only on special request and agreement.

## 6.2 Support

If you have any questions on specific installations that you cannot perform yourself, contact your local Software AG sales organization (https://www.softwareag.com/corporate/company/global/offices/default.html). To get detailed information and support, use our websites.

If you have a valid support contract, you can contact **Global Support ARIS** at: **+800 ARISHELP**. If this number is not supported by your telephone provider, please refer to our Global Support Contact Directory.

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## SOFTWARE AG EMPOWER PORTAL

You can find documentation on the Software AG Documentation website (https://empower.softwareag.com/). The site requires credentials for Software AG's Product Support site **Empower**. If you do not yet have an account for **Empower**, send an e-mail to empower@softwareag.com with your name, company, and company e-mail address and request an account.

If you have no account, you can use numerous links on the TECHcommunity website. For any questions, you can find a local or toll-free number for your country in our Global Support Contact Directory and give us a call.

### TECHCOMMUNITY

On the **TECHcommunity** website, you can find documentation and other technical information:

- Use the online discussion forums, moderated by Software AG professionals, to ask questions, discuss best practices, and learn how other customers are using Software AG technology.

- Access articles, code samples, demos, and tutorials.

- Find links to external websites that discuss open standards and web technology.

- Access product documentation, if you have **TECHcommunity** credentials. If you do not, you will need to register and specify **Documentation** as an area of interest.

### EMPOWER (LOGIN REQUIRED)

If you have an account for **Empower**, use the following sites to find detailed information or get support:

- You can find product information on the Software AG Empower Product Support website.

- To get information about fixes and to read early warnings, technical papers, and knowledge base articles, go to the Knowledge Center.

- Once you have an account, you can open Support Incidents online via the eService section of Empower.

- To submit feature/enhancement requests, get information about product availability, and download products, go to Products.

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