

ARIS

CONFIRMATION MANAGEMENT DASHBOARD INSTALLATION

VERSION 10.0 - SERVICE RELEASE 20 AND HIGHER
OCTOBER 2022

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 and Compliance, it only works if ARIS Risk and Compliance is properly installed.

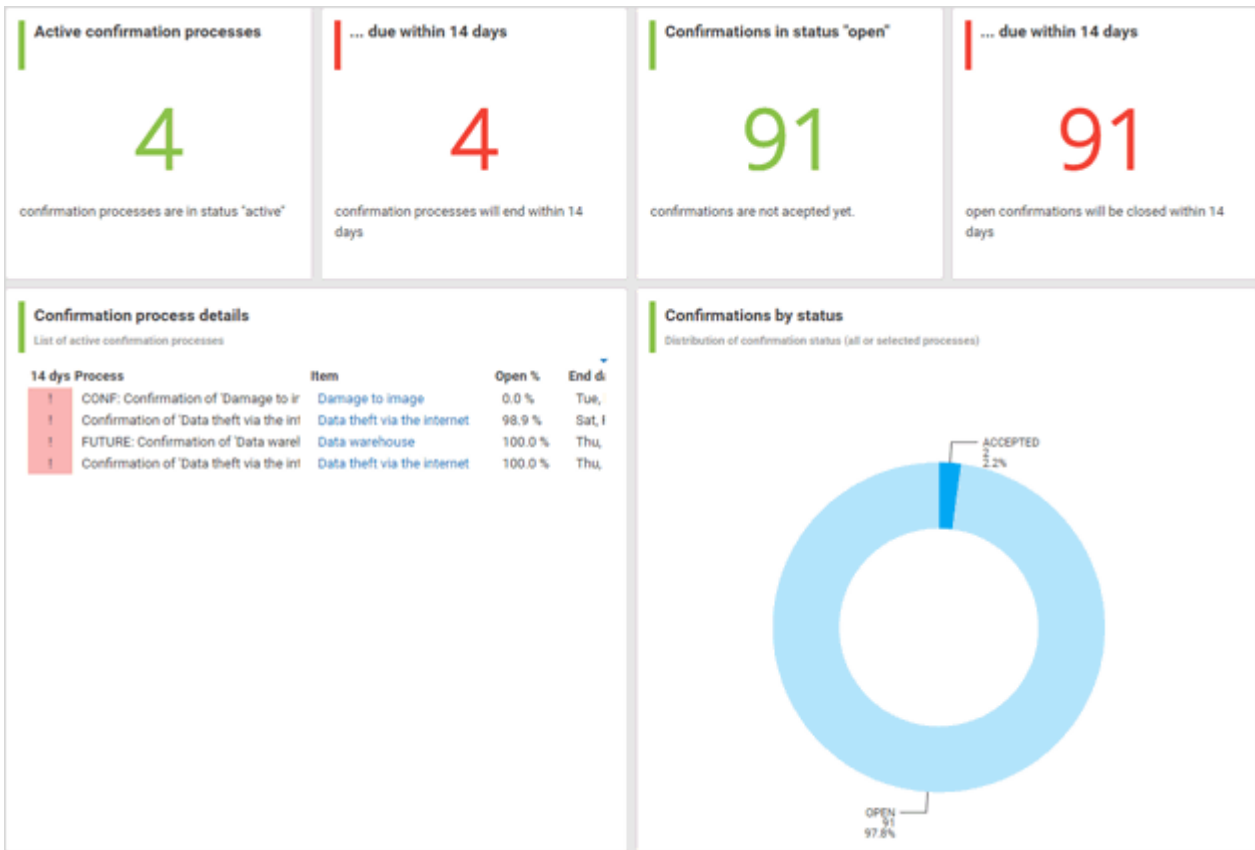
To make the dashboard available in ARIS, follow the instructions in this manual. For detailed information on dashboards, refer to the ARIS Aware online help in ARIS (**Use dashboards**) or the ARIS Aware Guide.

2 'Confirmation management' dashboard content

The **Confirmation management** dashboard uses data from ARIS Risk and Compliance. 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. 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 help. For detailed information on dashboard permissions, refer to **Manage dashboard permissions** in the ARIS help.

Procedure

1. Start ARIS.
2. Log in as **system** user.
3. Click  **Application launcher** >  **Administration**. ARIS Administration opens.
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 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.
2. Log in as **system** user.
3. Click  **Application launcher** >  **Administration**. ARIS Administration opens.
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 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.

Prerequisites

- ARIS and ARIS Risk and Compliance are available.
- Since the dashboard uses data from ARIS Risk and Compliance, it only works if ARIS Risk and Compliance 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).


Procedure

1. Start ARIS.
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.
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. 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, refer to the **ARIS Connect Administrator User Manual** or the ARIS 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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