Agility for Dynamic Business

AGILEMONITOR USER GUIDE

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AgileMonitor User Guide

1. Introduction

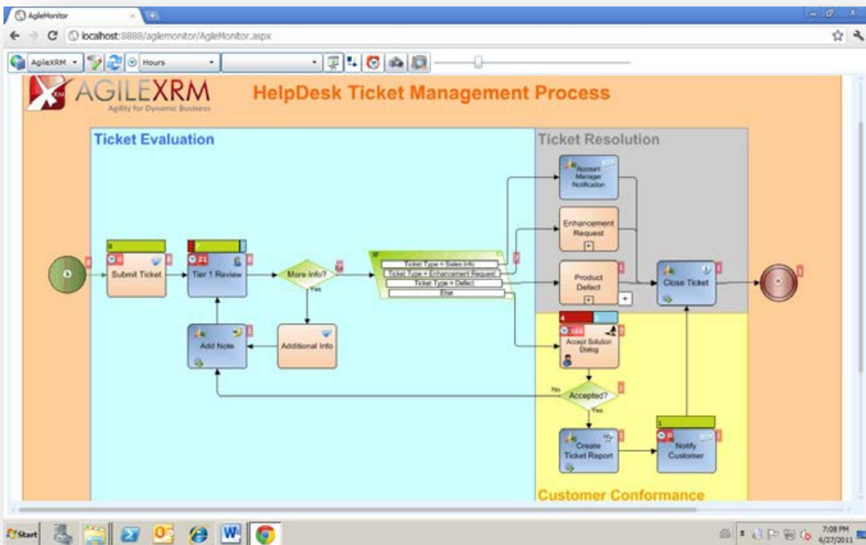
AgileMonitor is a Business User tool intended to be used by managers or process owners to monitor their processes and extract important KPI data from them.

1.1 Disclaimer of warranty

2. General Considerations

AgileMonitor is the tool used by process managers to monitor the status of multiple instances of the processes managed by them.

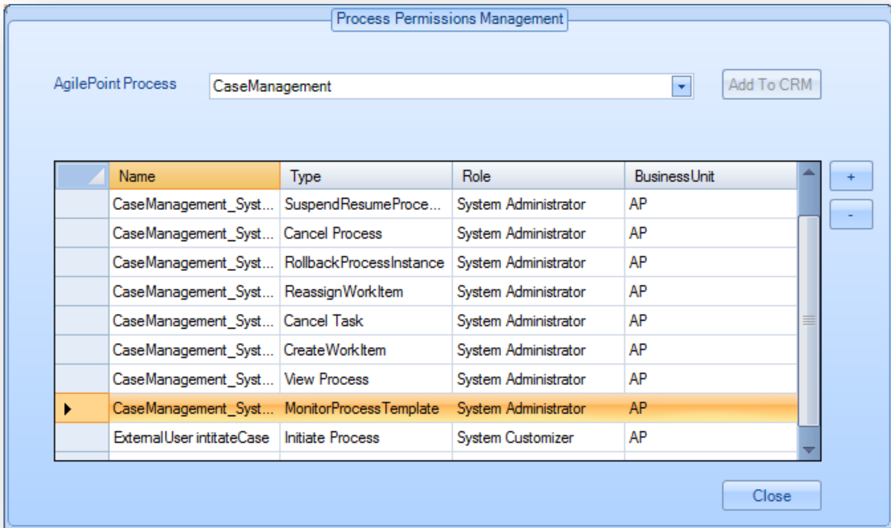
AgileMonitor is a web based tool that can be accessed using a web browser that has a Silverlight Plug-in. This includes Internet Explorer, Firefox, Chrome and Safari.



3. AgileMonitor Security

Managers can only view processes their own processes. Process monitoring permission is set at process template level so each manager can monitor different processes they own.
These permissions can be set from the Envision Process Modeler using the Process Security button in the AgileXRM menu:

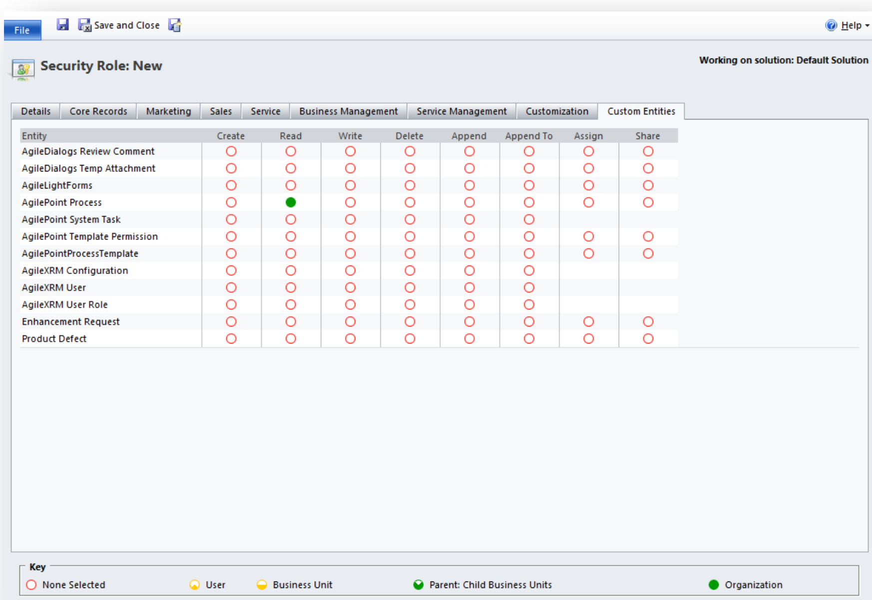
Using **Manage Permissions for this Process Template**:



The **Monitor Process Template** permission can be assigned to Roles in XRM.

CRM visibility rule are respected in AgileMonitor. For a process instance to be included for monitoring, the user (process manager) must have permissions to read the main entity of the process. For example, if a user is monitoring a process that manages Accounts, AgileMonitor will only monitor processes for those Account records that the user can see in XRM.

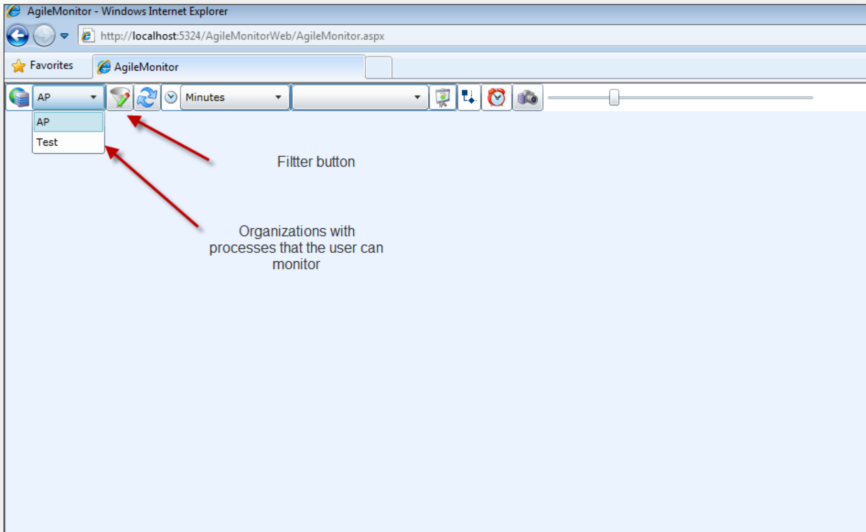
Additionally, the manager's Role should have *Read* permission for **AgilePointProcess** (ascentn_agilepointprocess) entity in XRM. This entity maintains the relation between the record in XRM and the process in AgileXRM.



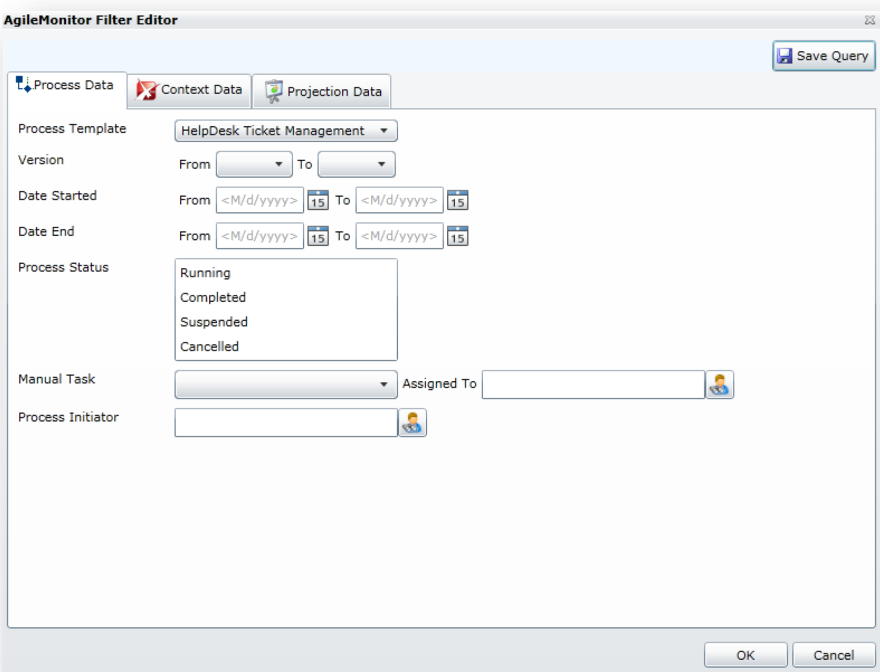
Depending on the level of permissions for this entity the user will see specific records.

4. Using AgileMonitor

Upon opening the AgileMonitor page, the user is presented with the following:



The first list box shows all the organizations that have processes which the user can monitor.
Once the organization is selected, the filter can be set using Filter button. This button opens the filter editor:



4.1 Filter Editor

The filter editor has 3 tabs:

- Process Data
  This tab contains filters based on data that is common to all processes in the system and not specific to a particular type of process.
- Context Data
  This is data that is specific to each process (e.g. Total in an Invoice, or Probability is an Opportunity)
- Projection Data
  All numeric data available in the process that can be shown on top of the process.

4.1.1 Process data

In this tab the user can set filters based on process related data.

Process Template

This field is required and it sets the name of the process the user wants to monitor by selecting it from the drop-down list.

Version

Process instances can be filtered by version range by setting the *From* and *To* fields. For example if the user selects *From 1.01 To 2.02,* AgileMonitor will show only process instances running on versions between 1.01 and 2.02, both inclusive.
An empty *From* field is equivalent to selecting the lowest version and an empty *To* field is equivalent to selecting the highest version.

NOTE: The drawing of the process that the user will see is always the one corresponding to the highest selected version but the data displayed on the report includes all the data from all the versions selected.

Date Started

When this filter field is used process instances are filtered by the date that the process was started. User can set a range using *From* and *To* fields.

Date End

When this filter field is used process instances are filtered by the date that the process was Completed (only Completed processes will be used). User can set a range using *From* and *To* fields.

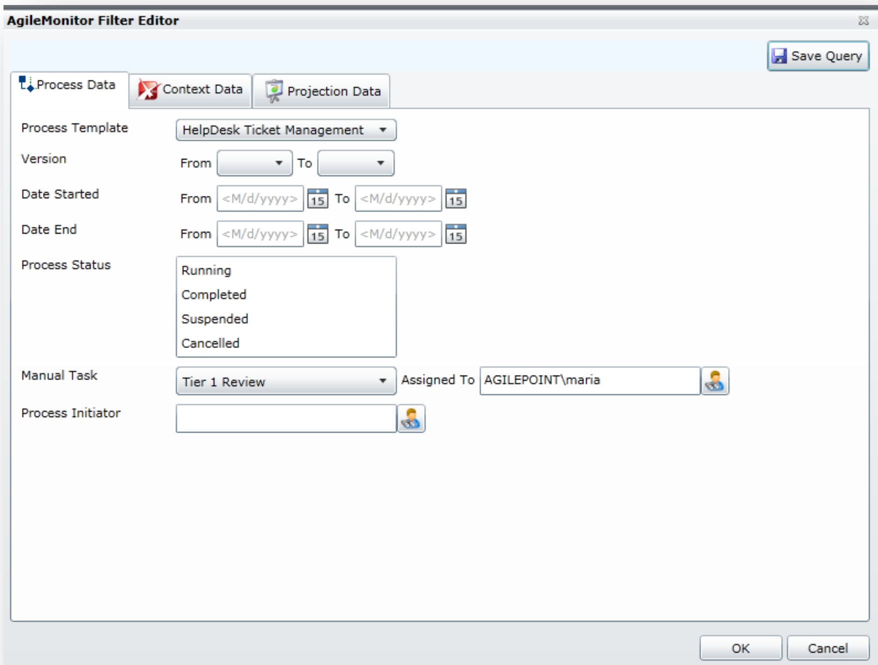
Process Status

Process instances can be filtered by status, which may be:

- Running
- Completed
- Suspended
- Cancelled

Manual Task

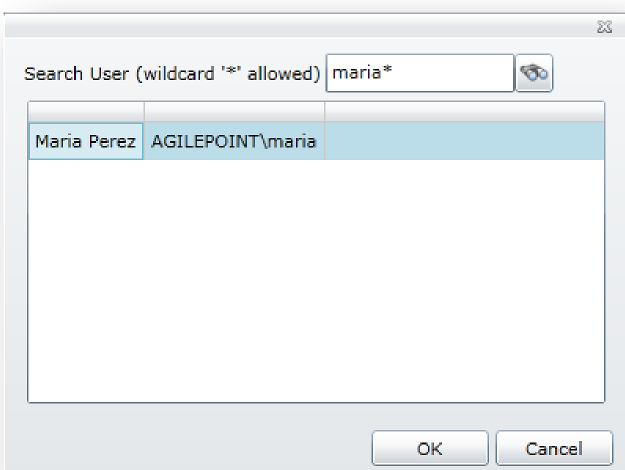
Process instances can be filtered setting the name of the user that participated in a specific activity.



In this sample AgileMonitor will show only processes where the user "AgilePoint\maria" participated in the "Tier 1 Review" task.

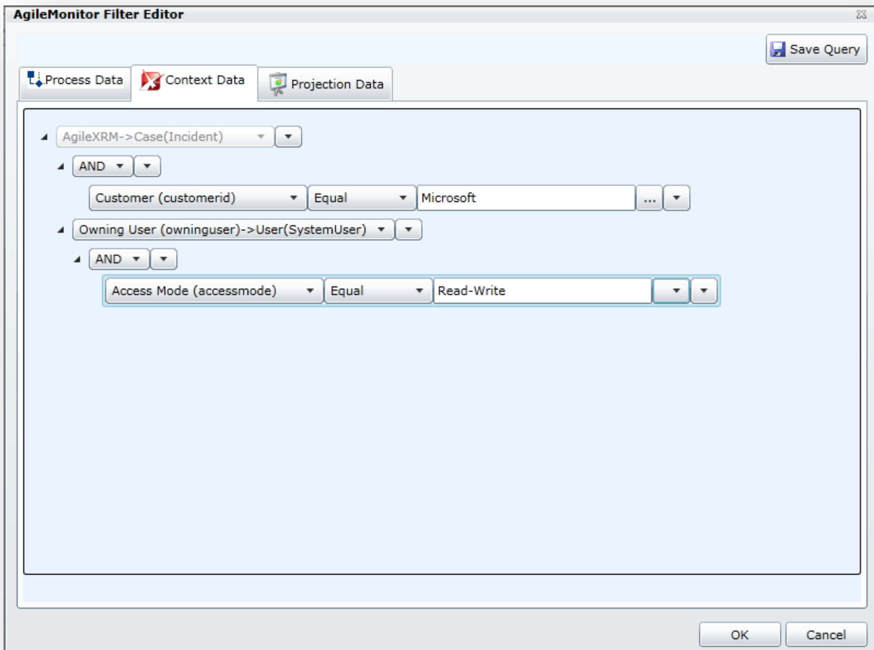
Process Initiator

Process can be filtered by the name of the user that started the process using this window:



4.1.2 Context Data

In this tab the user can set filters based on data stored in XRM Repository.
This filter functionality provides functionality similar to Advanced Find. The user can create complex queries easily based on entity relations in repository:



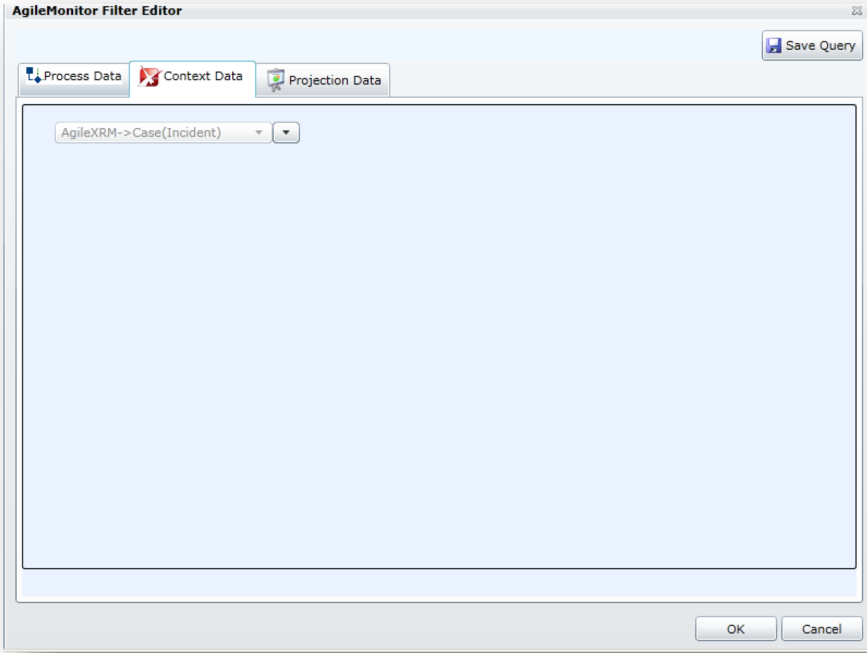
By default the filters sets the entity to look for *AgilePoint Process* and the main entity of the process template (in this sample *Case*).
Then the user can add filters to retrieve the records that will be used to show the graphics.
These filters will be applied to retrieve the process records that match the query.

4.1.3 Using Context Data Tab

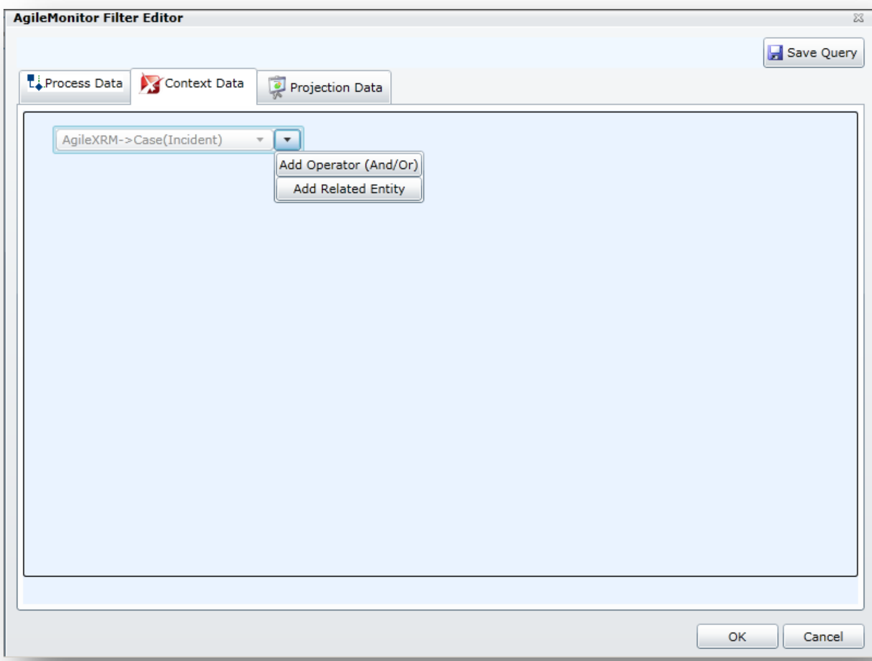
The filters that can be configured in this tool are similar to the filters configured in Advance Find in CRM. The filters are configured creating a tree that shows entity relations used in the query, logic operators (OR and AND) and conditions.
The tree allows 3 types of elements in the tree:

- Entities.
- Logical Operators
- Conditions.

The First element can be neither edited nor deleted, it is the name of the main entity of the process:



In this case the main entity of the processes that are filtered is *Case*.
In the right side of each element in the tree there is a set of options to be done in the element, in this sample the available options are *Add Operator(AND/OR)* and *Add Related Entity*:



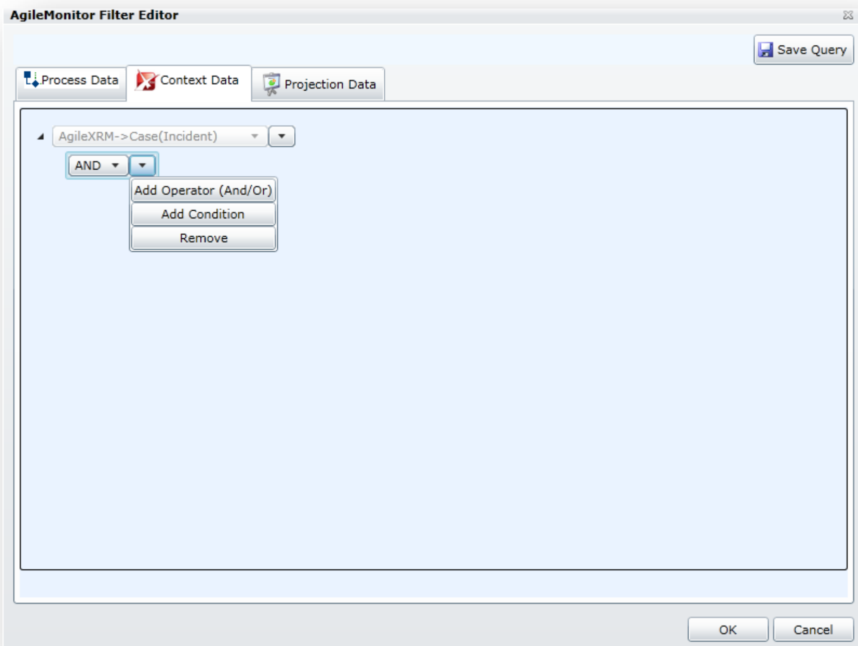
Operator elements

Add Operator is used to add an operator element in the tree. These rules apply to operator elements:

- Operator elements are containers of condition elements.
- Operator elements can contain other operator elements.
- Conditions must have an operator element parent.
- The operator is applied to all conditions that are children of the operator.
- An Entity element can contain several operator elements.
- The default operator is AND.

When an operator element is added the following options are available:

- Add Operator (And/Or)
- Add Condition
- Remove



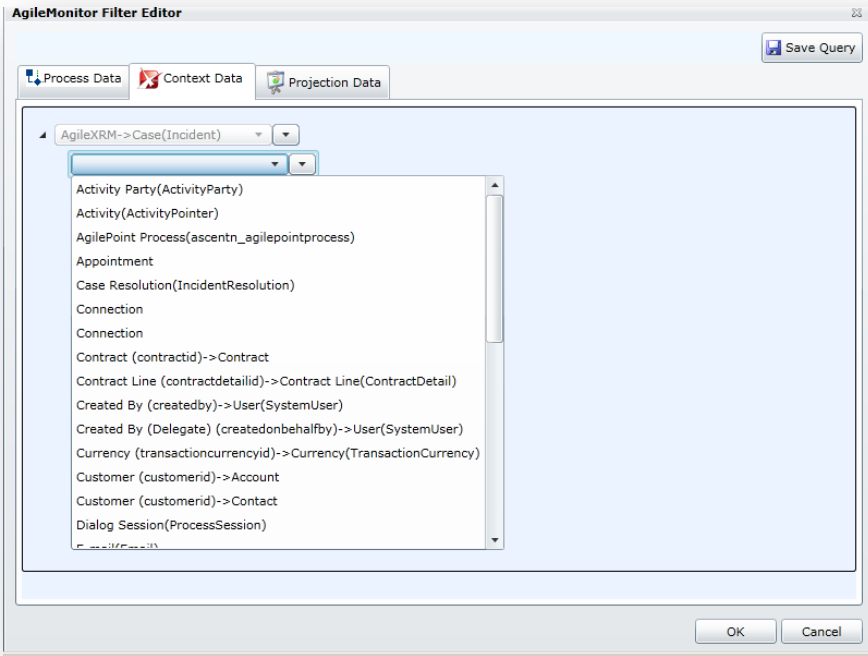
- *Add Operator* option is used to build complex queries combining OR and AND operators.
- *Add Condition* is used to add conditions as children of the operator.
- *Remove* removes the operator element and the conditions or operators that are its children.

Entity elements

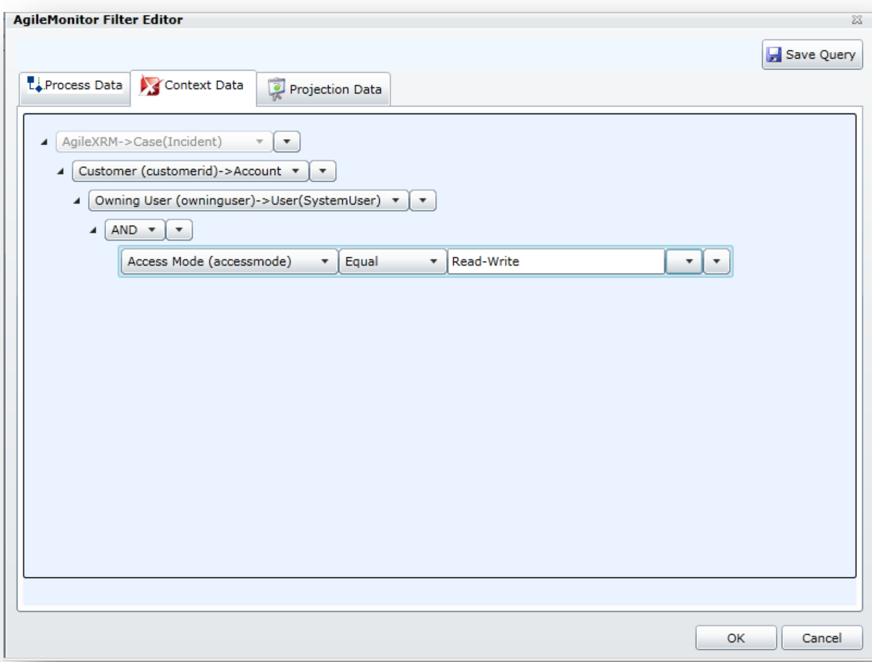
Add Related Entity is used to add filters using related entities.
These rules apply to entity elements:

- Entity elements can only be children of other entity elements.
- When an entity element is changed all children are removed.
- Entity elements can contain operator elements.

Add Related Entity allows adding conditions based on fields of a related entity:



The filter can manage multiple levels of nesting in relations, for instance starting in Case, the filter can go to Account and from Account to User to set a filter based on a value of the owning user of the Account of the Case:



Condition elements

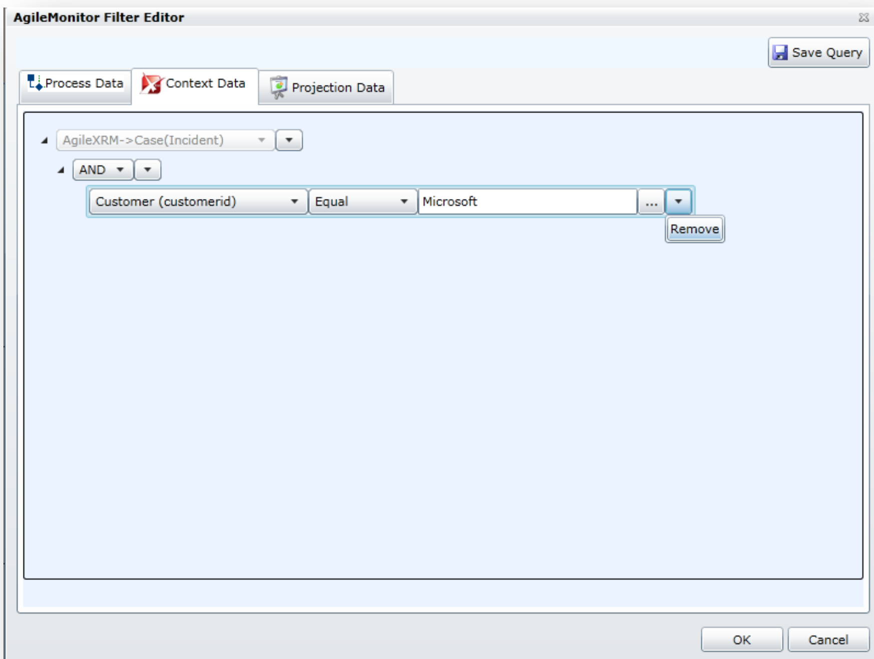
Condition elements are used to set the filters based on field values.
These rules apply to conditions:

- Condition elements can only be children of operator elements.
- Conditions cannot have children elements.
- A filter must have at least one condition for each entity element.

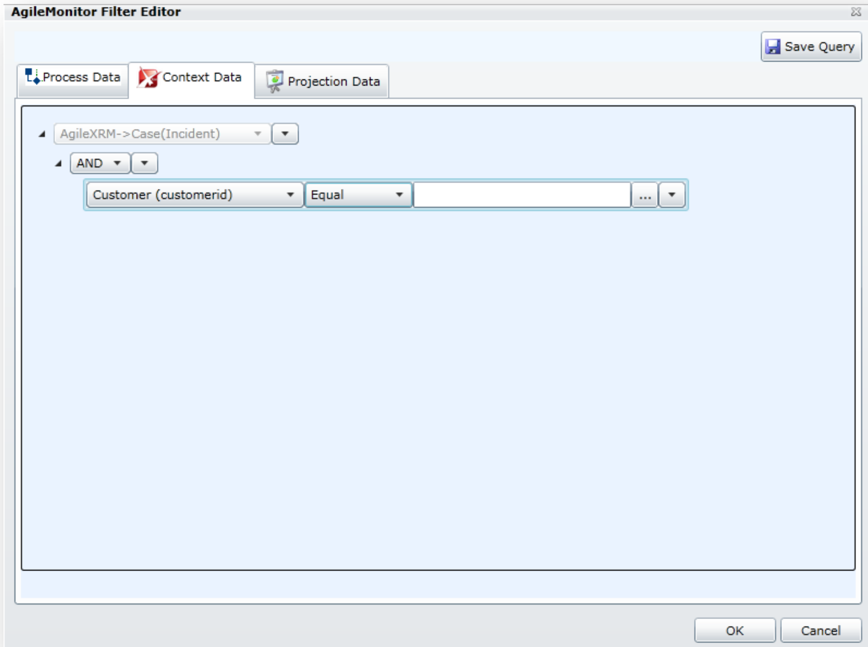
A condition has three parts:

- The field name.
- The operator.
- The value.

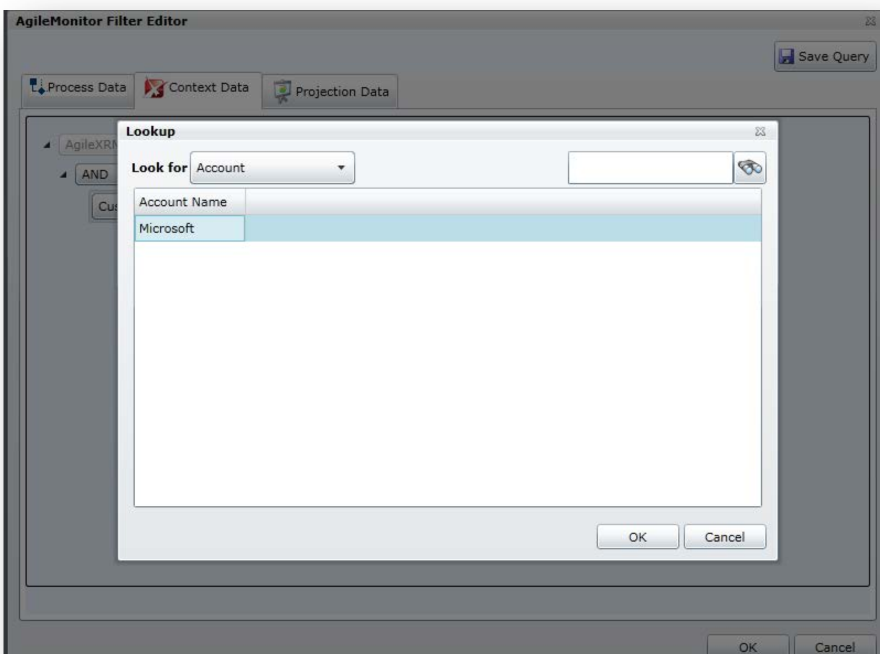
The only option available for condition elements is *Remove* (to remove the condition):



The list of available fields is based on the entity node that contains the condition.
The operators available depend on the type of the selected field.
The values interface can change depending on the type of the field. For option sets, the available values are the options. For lookups the value can be selected from a lookup window:

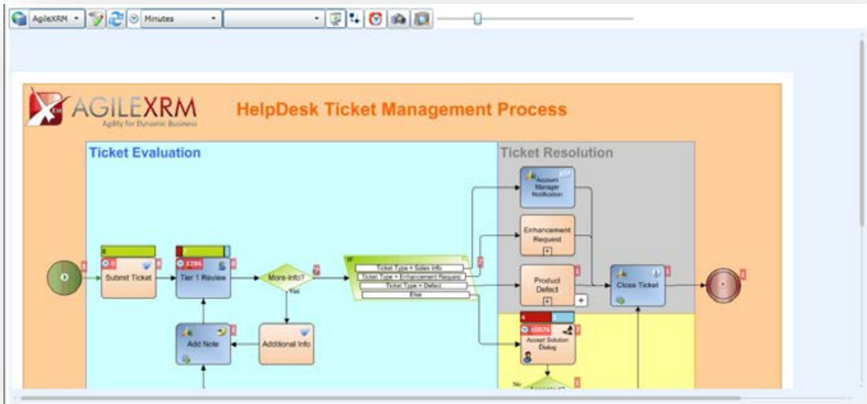


In this sample Customer is a lookup, the ellipsis button opens the lookup window to select the customer:



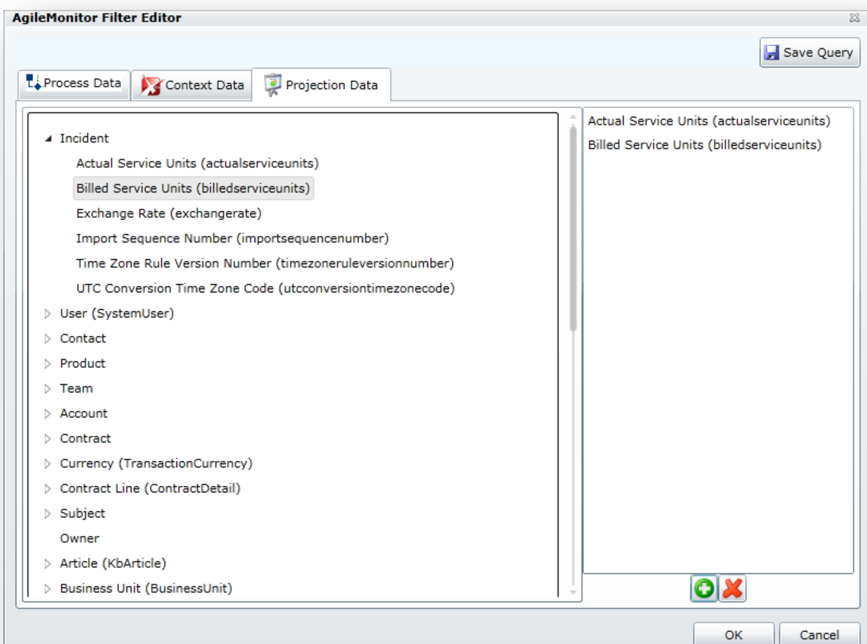
Records returned with filters

When the filter has been set on the process diagram is presented, the process instances returned will be all that meet the filters set in *Process Data* and in *Context Data* filters. AgileMonitor user can combine both types of filters in order to find the information to know the status of the process execution.



4.1.4 Projection Data

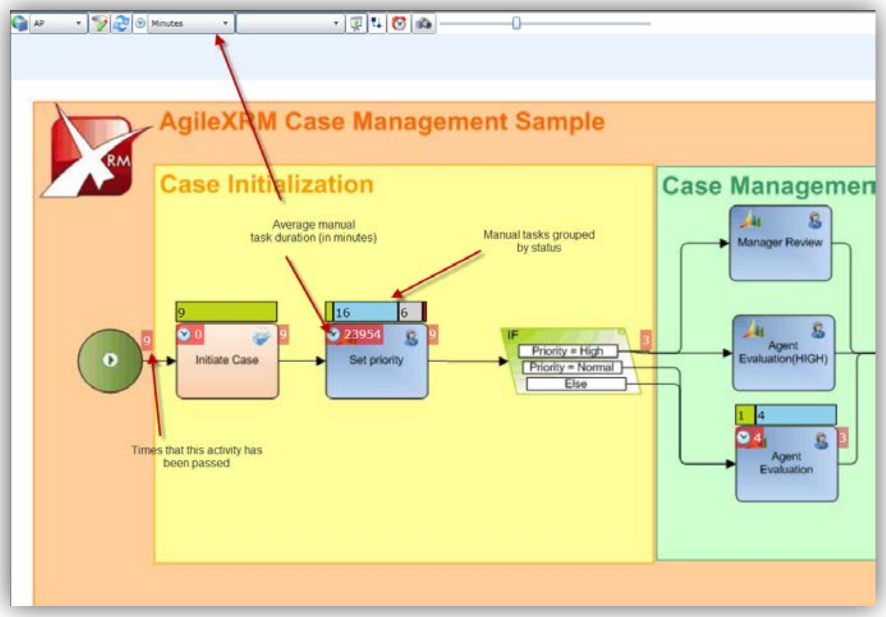
The user can project (i.e. superimpose) any numeric data available in the process on top of the process drawing to see the value of this field for all the processes that have passed each activity.
It is possible to select several values for projection:



When these values are selected, they can be used to project aggregate values on the process drawing. In this sample *Actual Service Units* and *Billed Service Units* are selected form projection.

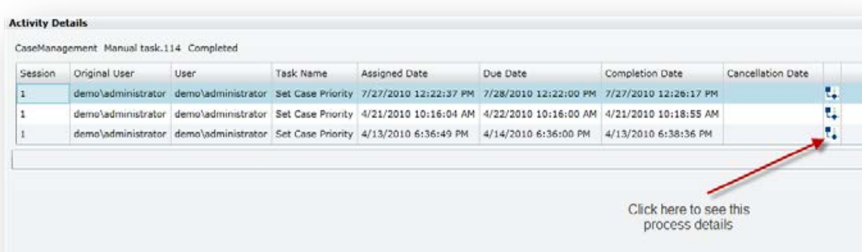
4.1.5 *AgileMonitor model view*

Once all the filters are set, by clicking OK, a graphic report will be presented to the user:



In this report the user can see this information:

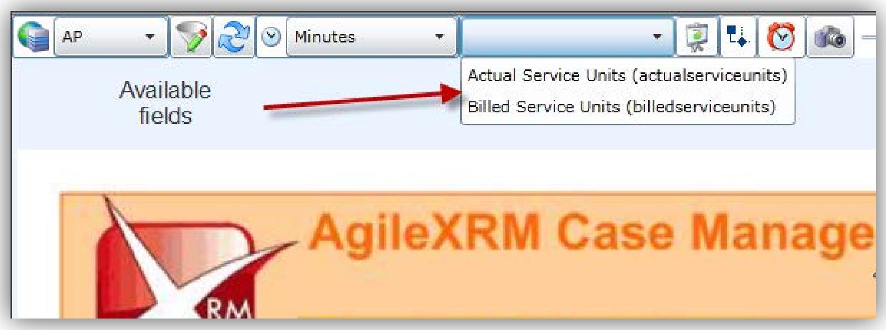
- On the right of each activity, a red square shows the number of processes where this activity has been executed.
- For each manual activity there is a red square with a little clock on the left top that shows the average duration of the manual tasks. The time unit (in the sample minutes) can be changed using the list on the AgileMonitor toolbox.
- For each manual activity there is a graph that shows the manual tasks grouped by status. When the user clicks in a specific status a list with the corresponding manual activities is opened:



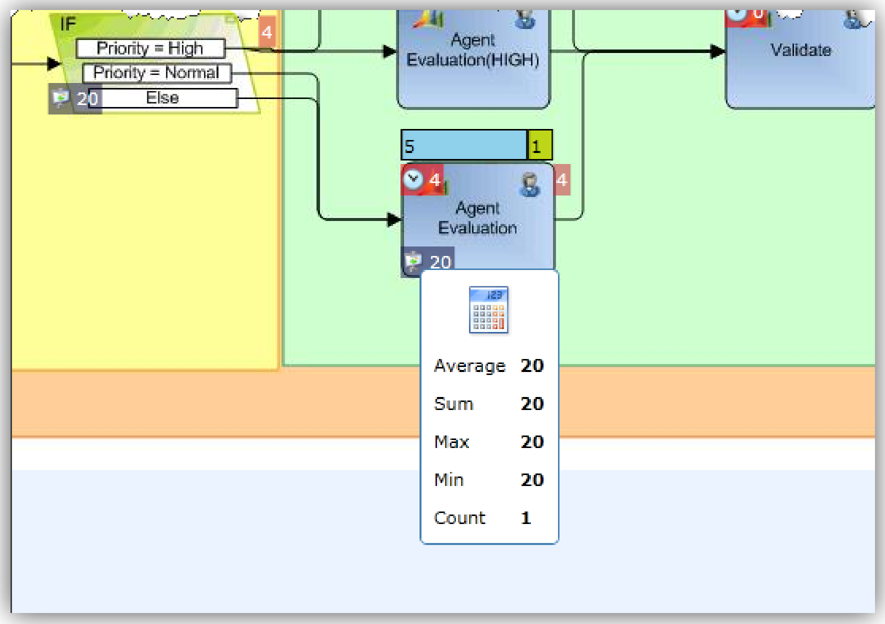
Session	Original User	User	Task Name	Assigned Date	Due Date	Completion Date	Cancellation Date
1	demo\administrator	demo\administrator	Set Case Priority	7/27/2010 12:22:37 PM	7/28/2010 12:22:00 PM	7/27/2010 12:26:17 PM	
1	demo\administrator	demo\administrator	Set Case Priority	4/21/2010 10:16:04 AM	4/22/2010 10:16:00 AM	4/21/2010 10:18:55 AM	
1	demo\administrator	demo\administrator	Set Case Priority	4/13/2010 6:36:49 PM	4/14/2010 6:36:00 PM	4/13/2010 6:38:36 PM	

View Projection data

To see the numeric data on the report, select the field to project:



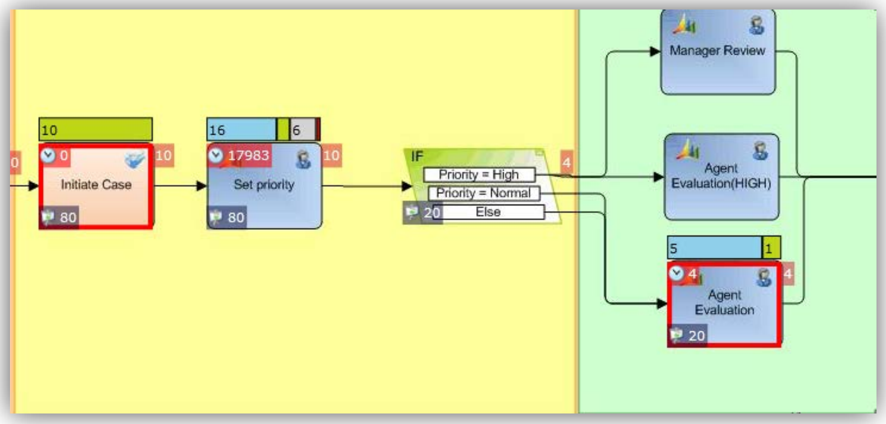
After select the field click the icon in the right of the list.
The report will show the numeric data over each activity:



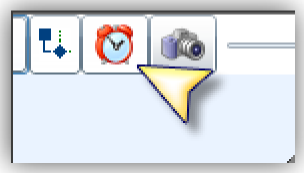
In this sample, 20 is the average "Billed Service Units" for all processes that has passed "Agent Evaluation" activity for the query specified in the filter window.

SLA Report

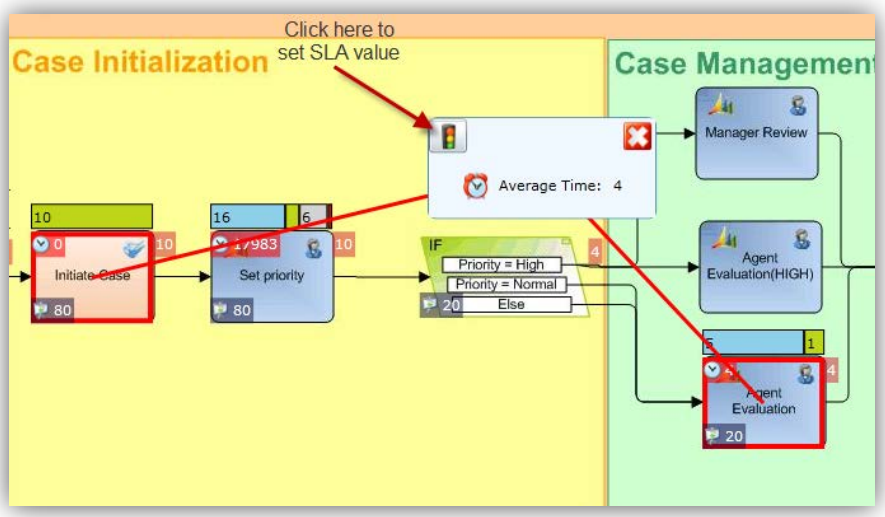
AgileMonitor can show average duration information between two activities in the process.
TO get this information select both activities clicking on them (selected activities will have a red square around them, To deselect one of these activities click on it):



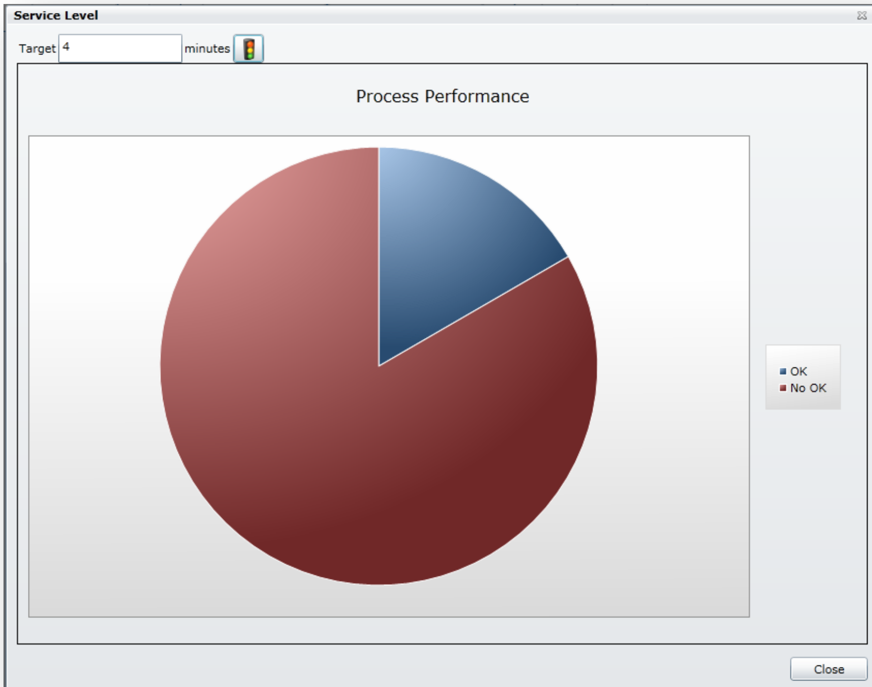
To see average duration between them, click this button:



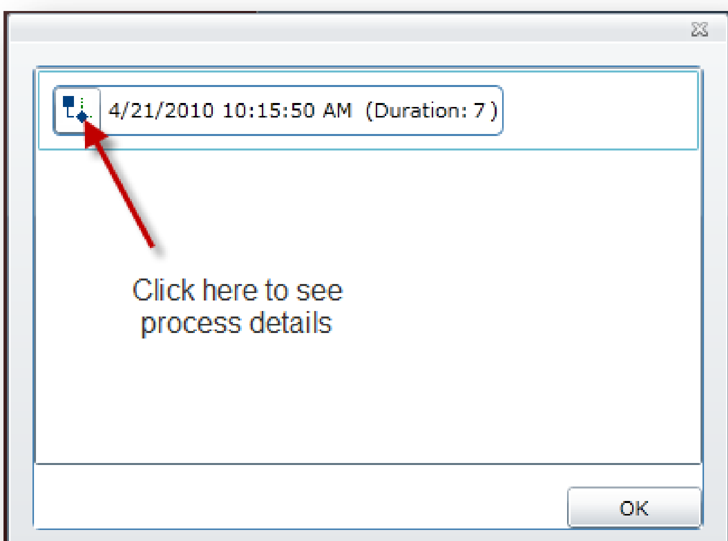
And this graphic is shown:



Clicking in the semaphore icon, SLA window is opened. In this window , the user can set a target value to see which processes do not fulfill this requirement:
In this sample half of the processes do not fulfill requirements:

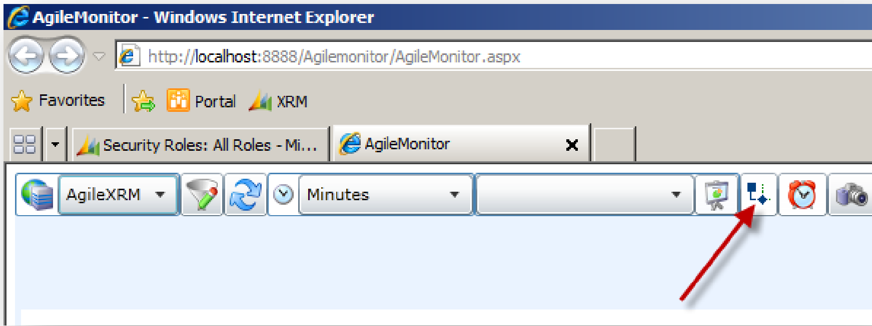


If the user clicks on the part of the graph that corresponds to processes that are not OK process details are presented:

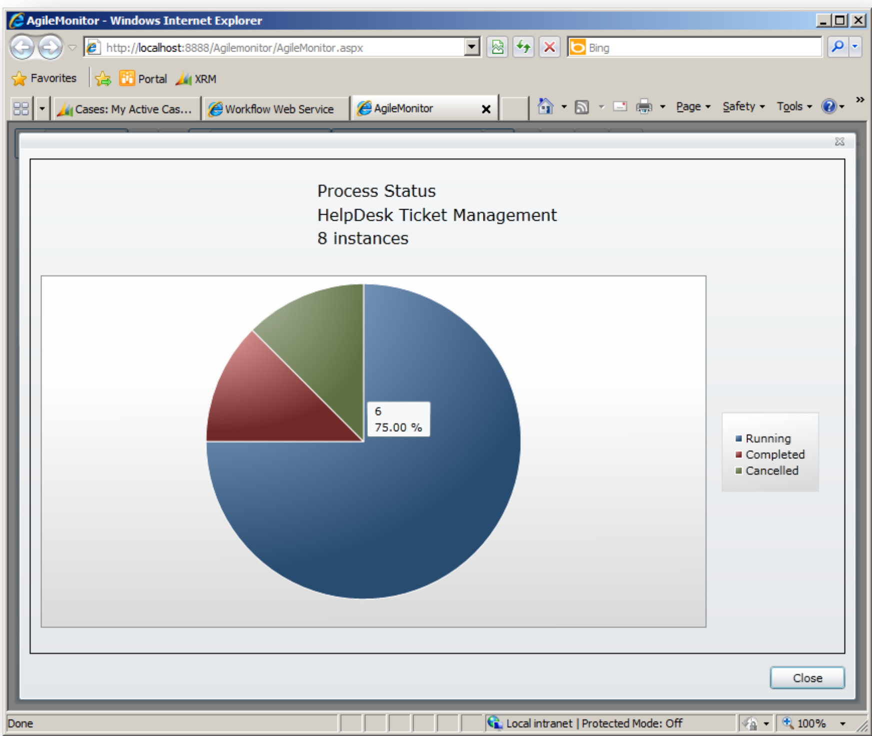


Processes Summary

Using the button Processes Summary:

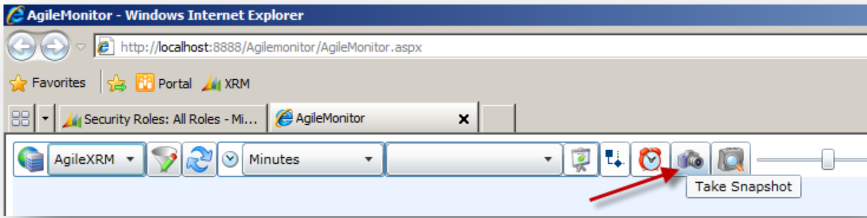


This report of processes by status is opened:



Taking Snapshots

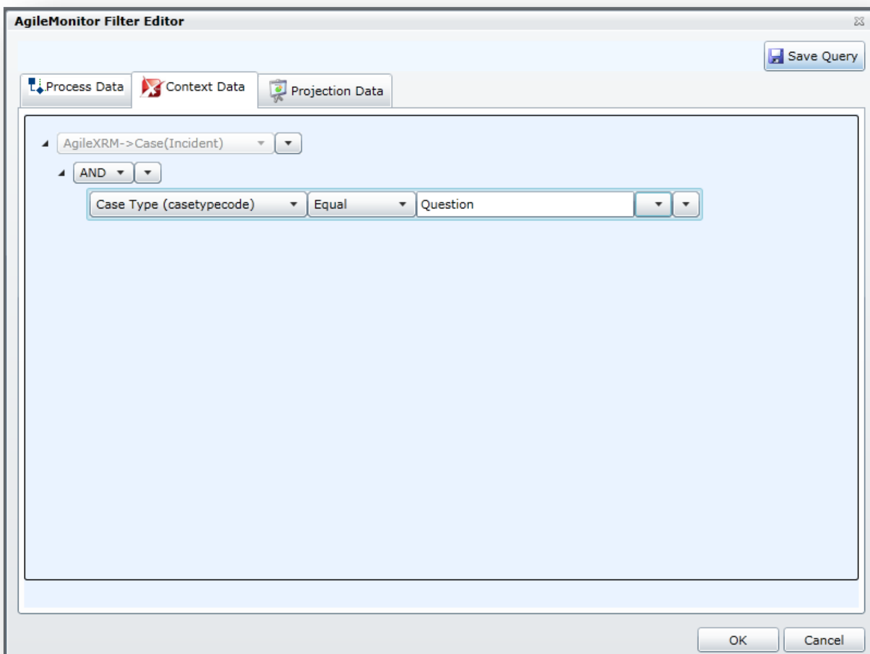
The button Take Snapshot can be used to save a snapshot of the data in AgileMonitor.



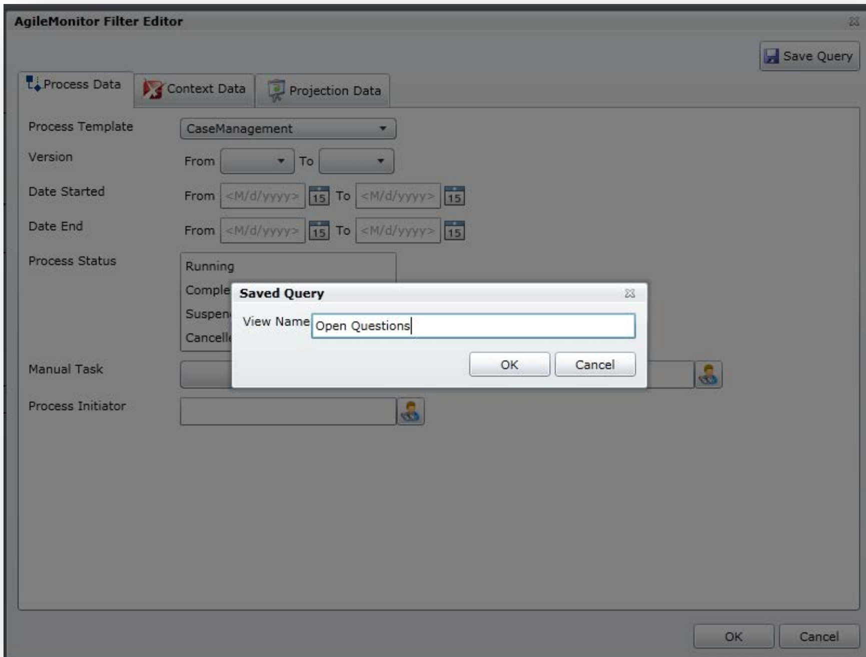
This button will open a dialog to save the PNG image created.

4.1.6 Saving Preconfigured Queries (Filters)

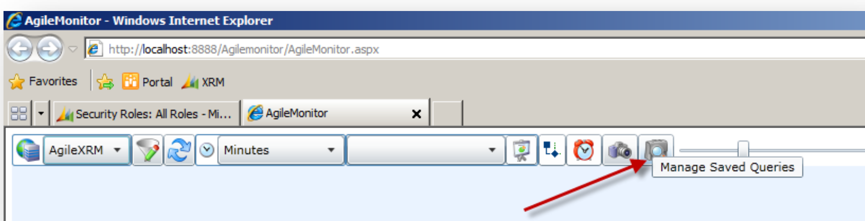
In order to make AgileMonitor more easy to use, filters can be preconfigured and saved to be reused either by the user in another moment or by other users (sharing the filters stored in a XML file).
When a filter is configured, this can be saved using Save Query button:



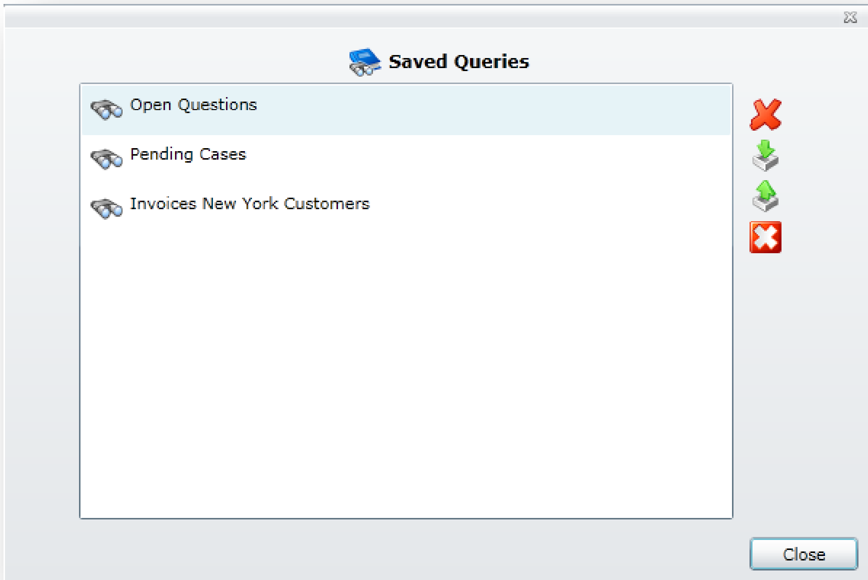
A name must be assigned to the preconfigured query:



When the query is saved, it can be used opening it from Manage Saved Queries window.
This button is used to manage preconfigured queries:



This is the window to manage the preconfigured queries:

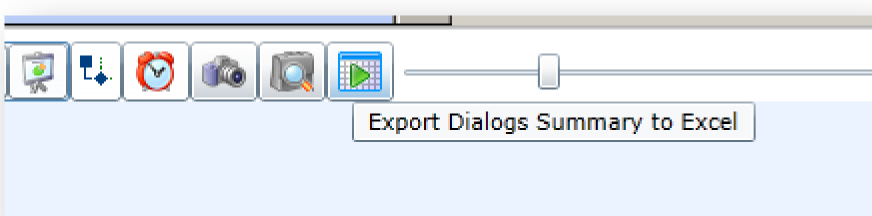


By clicking on the icon on the right of each query the query will be run and the results will be presented. In the right of the screen there is a set of options to manage preconfigured queries:

- Delete Queries: All the queries selected from the list are removed.
- Import Queries: Queries that have been previously exported (to an XML file) can be imported to be used by the current user.
- Export Queries: Queries can be exported to be shared by AgileMonitor users. The queries are exported to an XML file that can be used to import queries using the Import Queries option.
- Clear All Queries: All queries are deleted.

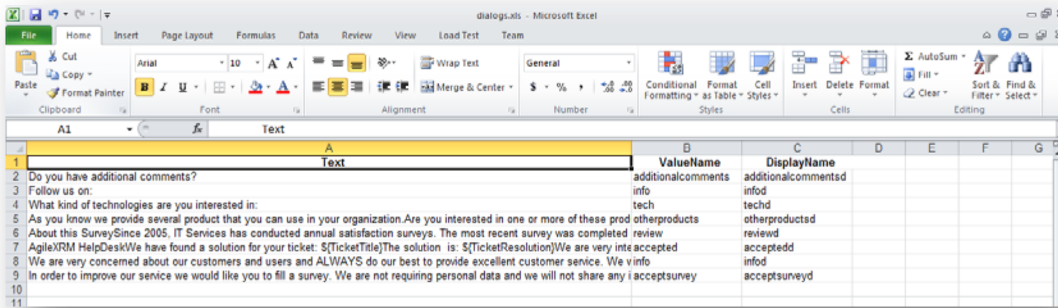
4.1.7 Exporting AgileDialogs Summary to Excel

When monitoring AgileDialogs templates the questions and answers of the instances monitored can be exported to an Excel file that will contain the questions content in a sheet and all response in another sheet.
This action can be performed using *Export Dialogs Summary to Excel* button:

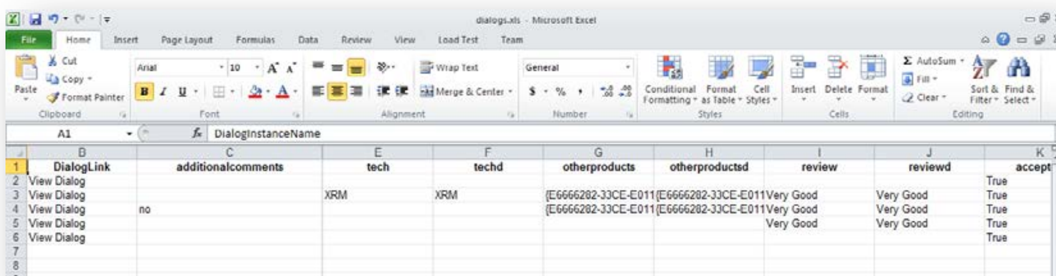


The created file can be saved and the open with Excel:

Dialog Questions tab contains the questions and the name of ValueName and DisplayName variables:



Dialogs sheet contains a row for each dialog execution with a column for each answer in the dialog. There is other useful information like dialog instance name, date start, date end,… and a link to open *Process Manager* for the corresponding instance in the column *DialogLink*:



This feature is only available for AgileXRM for Microsoft Dynamics CRM 2011.