Precise 10.3

Business Dashboard User Guide

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IDERA

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Precise Business Dashboard displays a centralized, high-level view of your organization's application structure, enabling you to effectively monitor the health status of all applications and application groups within this structure and navigate through the group's applications to a specific transaction, user or location showing distress.

This help includes the following sections:

- Introducing Precise Business Dashboard
- Business Dashboard basics
- Working with Precise Business Dashboard

Introducing Precise Business Dashboard

This section includes the following topics:

- About Precise Business Dashboard
- Features of Precise Business Dashboard
- Logging in to Business Dashboard

About Precise Business Dashboard

Precise Business Dashboard allows you to launch additional Precise software for further analysis or forward a link to the application for next level handling. For more details regarding the application structure, see About the application structure.

To view Precise Business Dashboard for an application, you must have Precise monitor permissions for that application.

To view and configure Precise Business Dashboard for an application, you must have Precise manager permissions for that application.

Precise Business Dashboard relies on Precise for Web to provide data from the activity generated in a monitored application. Therefore, Precise for Web needs to be installed and configured previously so that the TPM product can operate.

Precise Business Dashboard can detect application users and locations in PeopleSoft, SAP packaged applications, and in some custom applications like SharePoint.

Features of Precise Business Dashboard

With Precise Business Dashboard, you can:

- View the organization's application structure
- Check the health status of applications under your responsibility (based on Precise applications) to ensure they are providing their expected service level to application users
- View overtime activity trends for an application or application group
- Detect applications in distress and drill down through the application structure to locate the problem's origin
- View more details about the application's business transactions, users, locations, and more
- Launch additional Precise software for next level handling
- Forward a link to a specific application to the person responsible for further handling

Logging in to Business Dashboard

To log in to Business Dashboard, on the login screen

1. Enter your user name.
2. Enter your password.
3. Select the **Remember user name and password** check box (optional).
4. Click **Log in**.

> ⓘ   If you do not have a valid, licensed version of SmartLink installed, an error message will appear and login will be denied.

Business Dashboard basics

This section includes the following topics:

- How Business Dashboard is structured
- About the Business Dashboard toolbar
- About the Application Structure Overview pane
- About the Application Status pane
- How the Configuration screen is structured

How Business Dashboard is structured

The Business Dashboard screen includes the following three areas:

- Business Dashboard toolbar
- Application Structure Overview pane
- Application Status pane

Figure 1 Precise Business Dashboard screen
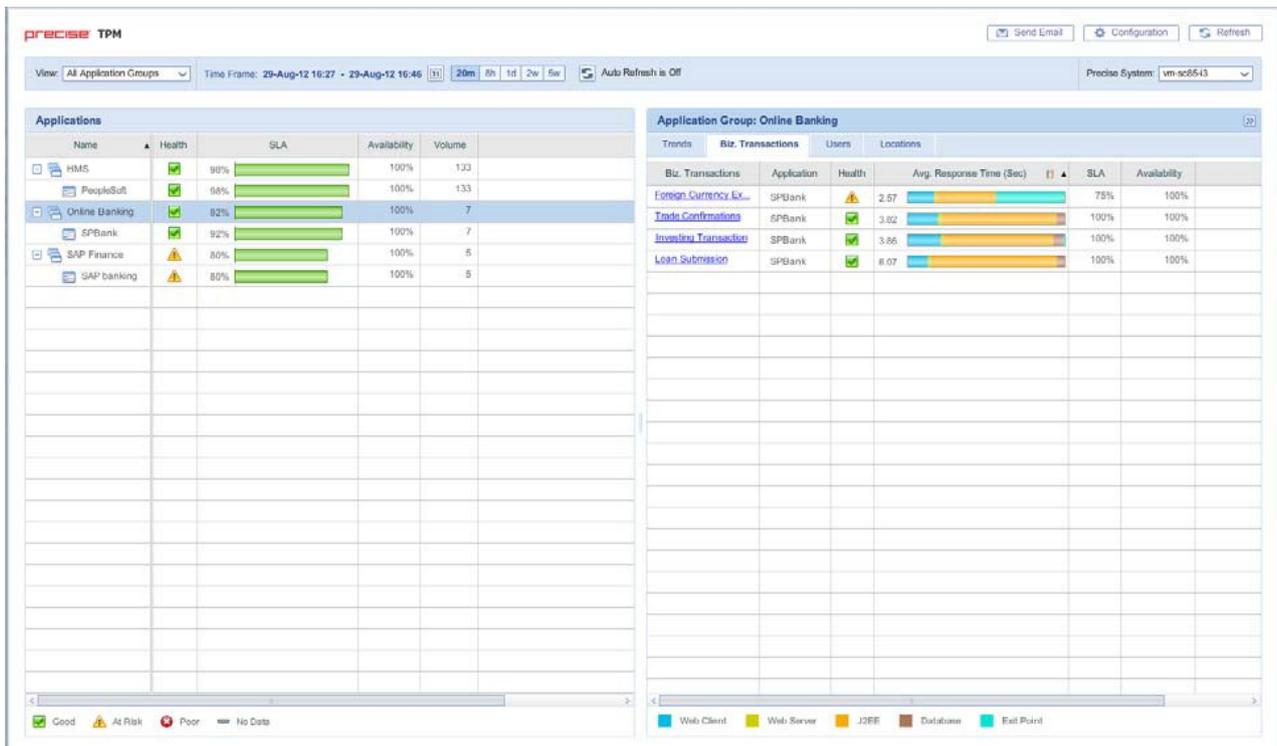
From the Business Dashboard toolbar (top), you select the Precise node (if there are multiple nodes installed), view, and time frame of the collected data displayed in the left and right panes below.

The Application Structure Overview pane (left) contains a tree view of all monitored application groups and applications, with their main metrics displayed in table format.

To configure your Application Structure and define its settings, see Configuring your application structure. Selecting an entity (application group or application) in the Application Structure Overview pane displays the associated information in the Application Status pane.

The Application Status pane (right) contains tabs displaying overtime graphs of the main metrics (Trends) or breakdowns of the logged activity by Biz. Transactions (Business Transactions), Users, and Locations for the selected application or application group.

About the Business Dashboard toolbar

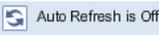The Business Dashboard toolbar enables you to select the Precise Node, View, Time Frame, and other control buttons.

The following table describes the function of each of the toolbar elements.

Table 1 TPM toolbar elements

Item	Name	Description
Send Email	Send E-mail	Sends an email message with a link to view the appropriate data.
Configuration	Configuration	Opens the Configuration screen to view, add, or edit current configurations.
Refresh	Refresh	Manually updates the data currently displayed for the defined time frame.
View: All Application Groups	View	Allows you to select a specific view, displaying information for a subset of all monitored application groups. The drop-down menu contains the following view options: • Critical Application Groups • Application Groups with Poor Health • All Application Groups (default)
20m 8h 1d 2w 5w	Time Frame	Allows you to select the desired time range for the displayed data. The time frame options include the option to define a customizable option using the calendar icon, in addition to the following predefined options: • Last hour (1h) • Last 6 hours (6h) (default) • Last day (1d) • Last 2 days (2d) • Last 7 days (7d) • Last 4 weeks (4w)
Auto Refresh is Off	Auto Refresh	Turns Auto Refresh On/Off. Offering the same functionality as the manual Refresh button, but enables you to configure the system to automatically refresh the information displayed or not.

Item	Name	Description
Node: ⌄	Node	The Node field shows you which Precise node is currently displayed. ⓘ The Node field is only displayed when more than one Precise node is installed, and only on Precise applications with the TPM version 8.8 patch installed.
»	Expand	Expands the Application Structure Overview pane, and hide the Application Status pane.
«	Collapse	Collapses the Application Structure Overview pane, and unhide the Application Status pane.

The Node menu allows you to choose one of several installed Precise nodes for monitoring.

ⓘ The Node field is only displayed when more than one Precise node is installed.

To select a Precise node from the Node field

1. Click the arrow on the right of the field to display all available Precise nodes.
2. Click to select one of the displayed nodes.
3. Click **OK**.

Selecting the Business Dashboard view

You can define Business Dashboard to display all monitored application groups or a subset of application groups in the Application Group Overview pane.

To define the Application Structure Overview pane view

1. Click the arrow on the right of the View field to display all application group types.
2. Click to select one of the following view options:
   - Critical Application Groups
   - Application Groups with Poor Health
   - All Application Groups (default)

Selecting a time frame

You can configure Business Dashboard to display transaction performance data for a specific time frame using the predefined time frame or calendar icons.

Selecting a predefined time frame from the toolbar displays transaction performance data for the selected time period up to the current time. See Selecting a predefined time frame from the TPM toolbar.

Selecting the time frame using the calendar icon, you can choose to define a time range independent of the current time, or to define a time range up to the current time. See Configuring the time frame using the calendar icon.

The predefined time frame options are:

- Last 20 minutes (20m)

- Last 8 hours (8h) (default)
- Last day (1d)
- Last 2 days (2d)
- Last 2 weeks (2w)
- Last 5 weeks (5w)

The time frame selected affects the information that is displayed in both panes on the Business Dashboard screen. Only data that falls within the selected time frame is shown in these areas.

Selecting a predefined time frame from the TPM toolbar

To select a predefined time frame

- From the TPM toolbar, select one of the predefined time frames.

Configuring the time frame using the calendar icon

To configure the time frame

1. Click the Calendar icon. In the dialog box that is displayed:
   a. Select **Time Range**, and then select the **Start** and **End** dates and times.
      OR
   b. Select **Last**, and then enter the desired time frame.
2. Click **OK**.

Sending an email message

You can send an email message to one or more recipients from the Business Dashboard toolbar.

The default subject for the message is "Precise Business Dashboard".

The email will include a link to the Business Dashboard view in the current context (time frame and selected entries).

To send an email message

1. Click **Send Email** on the Business Dashboard toolbar. The default email program opens.
2. Fill in the required fields and click **Send**.

Refreshing the Business Dashboard screen

Using the Business Dashboard or Configuration screen, you can both manually refresh the information displayed on the Business Dashboard screen and configure Business Dashboard to automatically refresh the information every five minutes.

To manually refresh the Business Dashboard screen for the selected time frame

- Click **Refresh** on the Business Dashboard toolbar.

To configure Business Dashboard to automatically refresh the information for the selected time frame every five minutes

- On the Business Dashboard toolbar, click **Auto Refresh is Off**. The icon will then say Auto Refresh is On.
  OR
- In the Display tab in the Configuration screen, check **Auto Refresh**.

Opening the Configuration screen

The Configuration screen displays a number of tabs based on what you want to configure.

To open the configuration screen

- Click **Configuration** on the Business Dashboard screen to open the configuration screen.

About the Application Structure Overview pane

The Application Structure Overview pane (left) displays information in table format for all application groups and applications.

The information displayed for SLA and Volume in this pane is solely based on transactions marked as key transactions for SLA and/or Volume. For details about key transactions, see About the application structure.

The data in all the table columns can be sorted in ascending or descending order. In addition, the column width and order can be adjusted by dragging and dropping the column heading to the desired location.

The table in the Application Structure Overview pane displays the following information:

- **Name**. The applications, displayed within their application groups.
- **Health**. The Health status icons ("Good", "At Risk", "Poor" or "No Data") represent the health status of an application or application group. The Health status is first calculated based on the combined percentage of SLA compliance and Availability according to a user defined ratio. The Health status icon is then based on user defined thresholds. These ranges are set in the Health tab on the Configuration screen.
- **SLA**. The SLA compliance rate, indicating the percentage of executions of key transactions for SLA that met the defined SLA thresholds
- **Volume**. The total number of executions of key transactions for volume.
- **Value ($)**. The total dollar value of the application or application group, based on the sum of the number of executions of each transaction within the application or application group multiplied by its defined dollar value per execution.

  > ⓘ When there is no Value ($) available, the Value ($) column will not appear.

- **Availability (%)**. The total percent of successful page invocations.

> ⓘ The information provided in the Application Structure Overview pane can be sorted by any of the displayed columns. To sort information, click on the desired column header. A black arrow will appear at the right of the column header indicating if the information is shown in ascending or descending order. In addition, the order of the columns on the table can be changed by dragging and dropping the desired column header.

About Application Groups

You can configure the application structure to include multiple applications and create custom application groups as desired.

The names of the application groups are displayed in the Name column.

Table 2 Types of Applications

Item	Name	Description
	Application Group name	Indicates an application group.
	Application name	Indicates a single application.

For more about the application structure, see About the application structure.

To configure the application structure, see Configuring your application structure.

About the Application Status pane

The Application Status pane (right) contains four tabs that display the associated data for the application or application group selected in the left pane. The name of the selected application or application group appears at the top of the right pane.

After selecting an application or application group in the left pane, select the appropriate tab in the right pane to view information.

The tabs are:

- Trends (default)
- Biz. Transactions (Business Transaction)
- Users
- Locations

To analyze a selected biz. transaction, user, or location, click on its link in the corresponding tab. See Analyzing transaction performance.

> ⓘ The information provided in the Biz.Transactions, Users and Locations tabs can be sorted by any of the displayed columns. To sort information, click on the desired column header. A black arrow will appear at the right of the column header indicating if the information is shown in ascending or descending order. In addition, the order of the columns on the table can be changed by dragging and dropping the desired column header.

Analyzing transaction performance

Transaction performance is analyzed by launching Insight SmartLink (if configured) or Precise for Web for a selected business transaction, user or location. When SmartLink is configured, the Transactions view is launched. When SmartLink for PeopleSoft is configured, the Web Expert view is launched.

> ⓘ Drilling down from a PeopleSoft application will always launch Precise for Web.

To analyze transaction performance

1. Click on an application group or application in the Application Structure Overview pane. The Trends tab in the right pane will display overtime graphs for the selected application group or application.
2. In the Application Status pane, select a tab to view the selected application or application group broken down according to biz. transaction, user, or location.
3. Select a biz. transaction, user, or location to launch SmartLink or Precise for Web in context.

About Trends

The Trends tab displays individual over time graphs for: SLA (%), Volume, and Value ($) for the application or application group selected in the Applications Structure Overview pane.

About the Biz. Transactions tab

The Biz. Transaction tab contains a table displaying the following information for each business transaction in the application or application group selected in the Application Structure Overview pane:

- **Biz. Transaction name**. The unique name of the biz. transaction. Active links in this column indicate the option for in-depth analysis. If SmartLink is configured the analysis will be done in the Transaction view, otherwise it will be done in the Web Expert view. The ToolTip displayed when hovering over the hyperlink indicates to where the link is launching (Precise for Web, Precise SmartLink).
- **Application**. If an application group is selected in the Applications Structure Overview pane, this column appears, displaying the specific application that the information in that row reflects.
- **Health**. The Health status icons ("Good", "At Risk", "Poor" or "No Data") represent the health status of an application or application group. The Health status is first calculated based on the combined percentage of SLA compliance and availability according to a user defined ratio. The Health status icon is then based on user defined thresholds. These ranges are set in the Health tab on the Configuration screen.
- **Avg. Response Time (Sec)**. The average response time for the biz. transaction, displayed in seconds. Next to the value in seconds, this column displays a color coded breakdown bar. This bar represents the relative average response time of each technology as a percentage of the total. The value per technology represents all AppTiers and instances for that technology.

> (i) Information displayed in this column can be displayed in two modes, depending on what information is important to the user. The fixed (default) mode displays the breakdown bar in full size for each biz. transaction. In this mode you can clearly see the relative response time breakdown per technology for each biz. transaction. The second mode displays a normalized view of the breakdown bar for each biz. transaction in relative size to the biz. transaction with the highest average response time. In this mode, you can see the actual response time breakdown per technology (in seconds) for each biz. transaction.

- **SLA (%)**. The SLA compliance rate, indicating the percentage of executions of key transactions for SLA that met the defined SLA thresholds.
- **Volume**. The total number of executions of key transactions for volume for the biz. transaction.
- **Availability (%)**. The total percent of successful page invocations.

About the Users tab

The Users tab contains a table displaying the following information for each user registered in the application or application group selected in the Applications Structure Overview pane:

- **Users**. The unique name for the user. Active links in this column indicate the option for in-depth analysis. If SmartLink is configured the analysis will be done in the SmartLink UI, otherwise it will be done in the Precise for Web UI.
- **Application**. If an application group is selected in the Applications Structure Overview pane, this column appears, displaying the specific application that the information in that row reflects.
- **Avg. Response Time (Sec)**. The average response time for the user, displayed in seconds. Next to the value in seconds, this column displays a color coded breakdown bar. This bar represents the relative average response time of each technology as a percentage of the total. The value per technology represents all AppTiers and instances for that technology. The length of the bar represents the overall average response time.

- **SLA (%)**. The SLA compliance rate, indicating the percentage of executions of key transactions for SLA that met the defined SLA thresholds
- **Volume**. The total number of executions of key transactions for volume by the user.
- **Availability (%)**. The total percent of successful page invocations.
- **Health**. The Health status icons ("Good", "At Risk", "Poor" or "No Data") represent the health status of an application or application group. The Health status is first calculated based on the combined percentage of SLA compliance and availability according to a user defined ratio. The Health status icon is then based on user defined thresholds. These ranges are set in the Health tab on the Configuration screen.

About the Locations tab

Having previously defined locations, you can logically divide the organization into geographic or organization groups. This helps you isolate local performance problems. The location definitions are based on the IP addresses of client machines.

The Locations tab contains a table displaying the following information for each location in the application or application group selected in the Applications Structure Overview pane:

- **Locations**. The name of the geographic location or organization group. Active links in this column indicate the option for in-depth analysis. If SmartLink is configured the analysis will be done in the Transaction view, otherwise it will be done in the Web Expert view.
- **Application**. If an application group is selected in the Applications Structure Overview pane, this column appears, displaying the specific application that the information in that row reflects.
- **Avg. Response Time (Sec)**. The average response time for the location, displayed in seconds. Next to the value in seconds, this column displays a color coded breakdown bar. This bar represents the relative average response time of each technology as a percentage of the total. The value per technology represents all AppTiers and instances for that technology. The length of the bar represents the overall average response time.
- **SLA (%)**. The SLA compliance rate, indicating the percentage of executions of key transactions for SLA that met the defined SLA thresholds
- **Volume**. The total number of executions of key transactions for volume from this location.
- **Availability (%)**. The total percent of successful page invocations.
- **Health**. The Health status icons ("Good", "At Risk", "Poor" or "No Data") represent the health status of an application or application group. The Health status is first calculated based on the combined percentage of SLA compliance and availability according to a user defined ratio. The Health status icon is then based on user defined thresholds. These ranges are set in the Health tab on the Configuration screen.

How the Configuration screen is structured

The Configuration screen enables you to define what information is displayed on the Business Dashboard screen. There are three tabs on the Configuration screen:

- Hierarchy (default)
- Health
- Display

> ⓘ Only users with Precise manager permissions will see all three tabs. Users with Precise monitor permissions will only see the Display tab.

From the Hierarchy tab, you can view, add, edit, or delete an application group, single application, or biz. transaction. From the Health tab, you can configure the formula that defines the health levels of applications, application groups, and biz. transactions.

From the Display tab, you can enable/disable the Auto Refresh function and define the information collection settings. The following table describes the functions of the Configuration screen elements.

Table 3 Configuration screen elements

Item	Name	Description
Business Dashboard	Business Dashboard	Click to open the Business Dashboard screen.
Node: ⌄	Node	The Node field shows you which Precise node is currently displayed. ⓘ The Node field is only displayed when more than one Precise node is installed, and only on Precise applications with the TPM version 8.8 patch installed. ⓘ The Node field will never be displayed in the Health tab as the Health settings are global.
Add Application Group	Add Application Group	In the Hierarchy tab, click this button to add a new application group.
Add Biz Transaction	Add Biz. Transaction	In the Hierarchy tab, click this button to add a new biz. transaction.

To filter the available applications, biz. transactions, users or locations, enter a name into the Filter field and click **Filter**.

About the Hierarchy tab

In the Hierarchy tab you can view and configure the application structure and define which transaction must be represented on the Business Dashboard screen.

In the left pane of the Hierarchy tab there is a tree view of your application structure hierarchy, showing:

- Application Groups
- Applications
- Biz. Transactions.

Table 4 Types of icons displayed in the left pane of the Hierarchy tab

Item	Name	Description
🖿	Application Group	Indicates application groups.
🖻	Application	Indicates a single application.
⟋	Biz. Transaction	Indicates a biz. transaction.

For more details about the application structure, see About the application structure.

From this pane, you can select a row and left-click to edit or delete an application group, single application, or biz. transaction.

For an application group, you can choose to:

- Add an application group
- Edit
- Delete
- Designate and mark an application group to be critical. See Scenario # 1 - Adding a new application group, Scenario # 2 - Editing an application group, and Scenario # 3 - Deleting an application group.

For a biz. transaction, you can choose to:

- Add biz. transaction
- Edit
- Delete

See Scenario # 4 - Adding a new biz. transaction, Scenario # 5 - Editing biz. transactions, and Scenario # 6 - Configuring key transactions.

About the Health tab

In the Health tab, you can view and configure the health status definitions for the application structure.

The health status icons ("Good", "At Risk", "Poor" or "No Data") represent the health status of an application or application group. The health status is first calculated based on the combined percentage of SLA compliance and availability according to a user defined ratio. The health status icon is then based on user defined thresholds.

See Scenario # 9 - Customizing the Health status.

About the Display tab

In the Display tab, you can define the information collection settings:

- Enable/disable the Auto Refresh function.

See Scenario # 10 - Enabling/Disabling Auto Refresh.

Working with Precise Business Dashboard

This section includes the following topics:
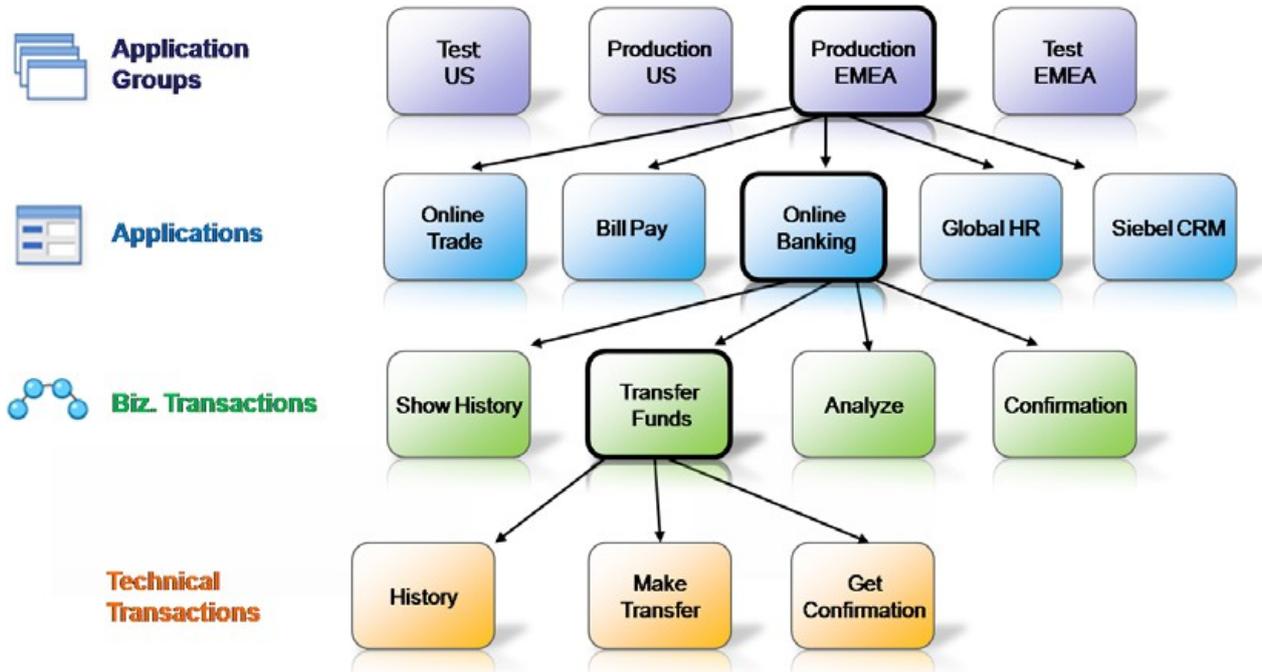
About the application structure

The Precise Business Dashboard application structure is based on the following hierarchy:

- **Application Group**. Group of applications.
- **Application**. Group of biz. transactions.
- **Biz. Transaction**. Group of technical transactions. Each biz. transaction contains either a page title, page URL or URL.
- **Technical Transaction**. Transactions monitored by Precise. A transaction is either a page title or a page URL.
- **Key Transaction for SLA**. Transactions configured to be calculated towards the SLA value displayed in Business Dashboard.
- **Key Transaction for Volume**. Transactions configured to be calculated towards the Volume value displayed in Business Dashboard.

Sample application structure hierarchy

The following diagram illustrates a sample application structure hierarchy.

Figure 1 Sample application structure hierarchy

This sample application structure includes four application groups:

- Test US
- Production US
- Production EMEA
- Test EMEA

Application group "**Production EMEA**" contains the following five applications:

- Online Trade
- Bill Pay
- Online Banking
- Global HR
- Siebel CRM

The "**Online Banking**" application contains the following four biz. transactions:

- Show History
- Transfer Funds
- Analyze
- Confirmation

The "**Transfer Funds**" biz. transaction contains the following three technical transactions.

- Check Status
- Make Transfer
- Get Confirmation

Viewing your application structure in the Business Dashboard screen

The Application Structure Overview pane in Business Dashboard displays the monitored application groups and applications in the Application Structure Overview pane, and the biz. transactions are displayed in the Application Status pane. Therefore, the sample application structure, shown in Sample application structure hierarchy, is displayed in the Business Dashboard screen as shown in the following figure.

**Figure 2** Sample application structure in the Business Dashboard screen
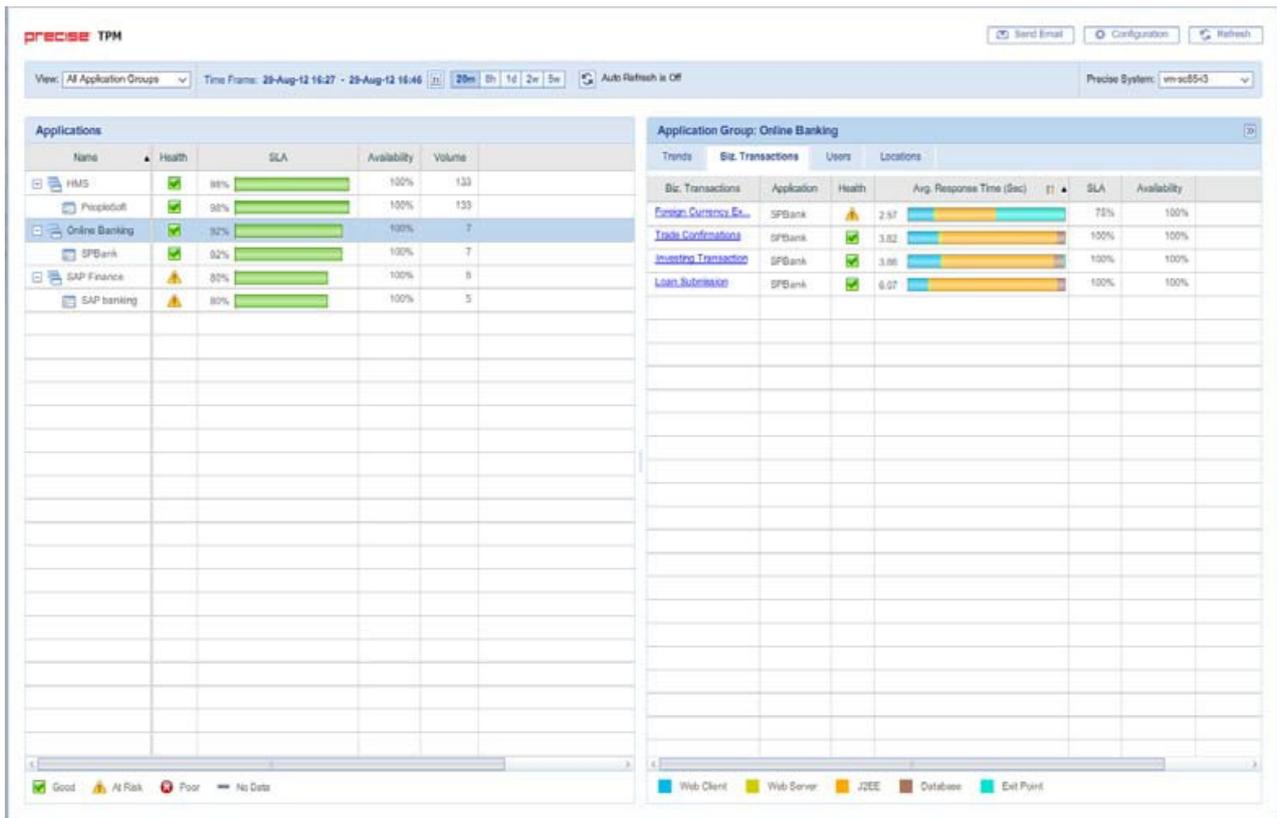
Viewing your application structure in the TPM Configuration screen

The Application Structure Hierarchy pane in the Configuration screen displays the monitored application groups, applications and biz. transactions, and the technical transactions are displayed in the right pane. Therefore, the sample application structure, shown in Sample application structure hierarchy, is displayed in the Configuration screen as shown in the following figure.

Figure 3 Sample application structure in the Configuration screen
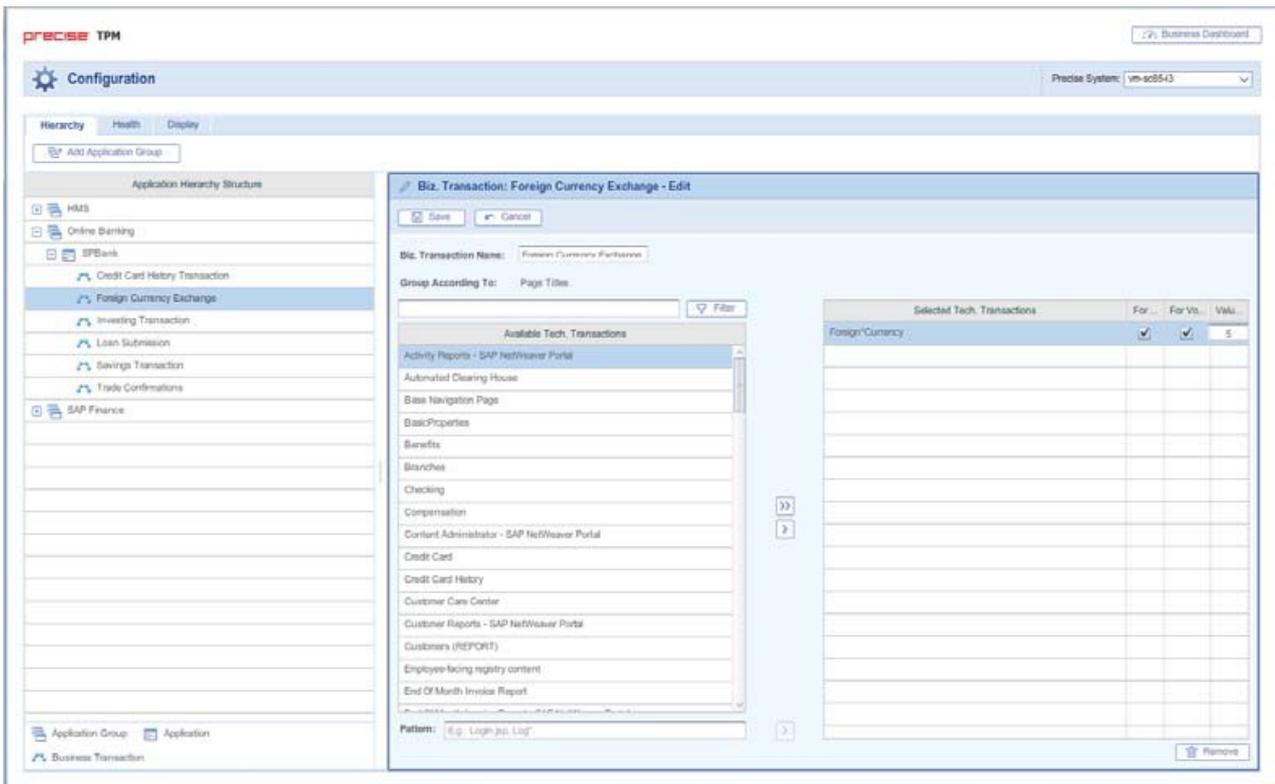
Configuring your application structure

> ⓘ To effectively and efficiently monitor your application, before configuring your application structure see About the application structure.

Configure your Application Structure with the following procedures:

Scenario # 1 - Adding a new application group

In the Hierarchy tab in the Configuration screen, you can create a new application group to be displayed in the Business Dashboard.

To add a new application group

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).

2. Click **Add Application Group**. The Application Group window opens on the right pane showing available and selected applications.
3. In the Application Group Name field, enter a unique name.
4. In the Description field, enter a text description to identify the application group.
5. If you want this application group to be defined as critical, check mark the Critical box.
6. In the Available Applications list, click a name and click the Add (right arrow) to add it to the Selected Applications list. Another option is to select more than one group of names, drag and drop them to the Selected Applications list on the right.
7. To filter and reduce the number of Available Applications displayed in the left list, type a name into the Filter field and click **Filter**.
8. In the Selected Applications list, select a name and click the left arrow to return it to the Available Applications list. Another option is to select more than one group of names, drag and drop them to the Available Applications list on the left.
9. Click **Save** to save the new configuration. The new application group will appear on the left in the Application Hierarchy Structure pane. If the group was marked as critical, it will appear in the View menu under Critical Application Groups.

Scenario # 2 - Editing an application group

In the Hierarchy tab in the Configuration screen, you can edit an application group.

To edit an application group

1. From the Business Dashboard screen, click Configuration to open the Configuration screen and the Hierarchy tab (default).
2. Select an application group from the left pane. There are two options to enter the Edit mode:
   a. Click the arrow beside the application group name (left pane) and left-click **Edit**. The Application Group window opens on the right pane showing available and selected applications.
   b. Or on the right pane, click **Edit**.

3. In the Application Group Name field, if desired, update the name of the application group.
4. In the Description field, enter a text description (no more than two lines) to identify the application group.
5. If you want this application group to be defined as critical, check mark the Critical box.
6. In the Available Applications list, click a name and click the Add (right arrow) to add it to the Selected Applications list. Another option is to select more than one group of names, drag and drop them to the Selected Applications list on the right.
7. To filter and reduce the number of Available Applications displayed in the left list, type a name into the Filter field and click **Filter**.
8. In the Selected Applications list, click a name and click the left arrow to return it to the Available Applications list. Another option is to select more than one group of names, drag and drop them to the Available Applications list on the left.
9. Click **Save** to save the new configuration. The edited application group will now appear on the left in the Application Hierarchy Structure pane. If the group was marked as critical, it will appear in the View menu under Critical Application Groups.

Scenario # 3 - Deleting an application group

In the Hierarchy tab in the Configuration screen, you can delete an application group.

To delete an application group

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select an application group from the left pane.
3. Click the arrow beside the application group name (left pane) and left-click **Delete**.

4. Or on the right pane, click **Delete**.

Scenario # 4 - Adding a new biz. transaction

In the Hierarchy tab in the Configuration screen, you can add new biz. (business) transactions.

To add a new biz. transaction

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select an application from the left pane. The Application window opens on the right pane showing selected biz. transactions.
3. On the right pane, click **Add Business Transaction**. The Biz. Transaction window opens on the right pane showing available and selected biz. transactions.
4. In the Biz. Transaction Name field, enter a unique name.
5. In the Available Transactions list, click a name and click **Add** (right arrow) to add it to a Selected Biz. Transactions list on the right. Another option is to select more than one transaction, drag and drop them to the Selected Transactions list on the right.
6. To filter and reduce the number of Available Transactions displayed in the left list, type a name into the Filter field and click **Filter**.
7. In the Selected Transactions list, click a name and click **Remove** (left arrow) to return it to Available Transactions list. Another option is to select more than one group of names, drag and drop them to the Available Transactions list on the right.
8. In the Pattern field, enter a pattern option.
9. Click **Save** to save the configuration settings.

Scenario # 5 - Editing biz. transactions

In the Hierarchy tab in the Configuration screen, you can edit biz. (business) transactions.

To edit biz. transactions

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select a biz. transaction from the left pane. The selected transaction information is displayed on the right pane.
3. Click the arrow beside the biz. transaction name (left pane) and left-click **Edit**. The biz. transaction window opens on the right pane showing available and selected transactions.
4. Or on the right pane, click **Edit**.
5. In the Biz. Transaction Name field, enter a unique name.
6. In the Available Transactions list, click a name and click **Add** (right arrow) to add it to the Selected Transactions list. Another option is to select more than one group of names, drag and drop them to the Selected Biz. Transactions list on the right.
7. To filter and reduce the number of Available Transactions displayed in the left list, type a name into the Filter field and click **Filter**.
8. In the Selected Biz. Transactions list, click a name and click **Remove** (left arrow) to return it to Available Biz. Transactions list. Another option is to select more than one group of names, drag and drop them to the Available Biz. Transactions list on the left.
9. Click **Save** to save the configuration settings.

Scenario # 6 - Configuring key transactions

In the Hierarchy tab in the Configuration screen, you can define which transactions will be key transactions for SLA and/or Volume, calculated towards the SLA and /or Volume values displayed in Business Dashboard.

To configure which metrics a transaction will be calculated for

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select a biz. transaction from the left pane. The selected transaction information is displayed on the right pane.
3. Click the arrow beside the biz. transaction name (left pane) and left-click **Edit**. The Biz. Transaction window opens on the right pane showing available and selected transactions.
4. Or on the right pane, click **Edit**.
5. In the Selected Tech. Transactions list, for each selected technical transaction, check mark the "For SLA" and "For Volume" boxes, according to the metrics you want the selected technical transaction to be calculated for.
6. In the Selected Tech. Transactions list, enter the dollar value threshold the technical transaction must meet to be calculated in the Value ($) field displayed in Business Dashboard.
7. Click **Save** to save the configuration settings.

Scenario # 7- Configuring the transaction Value ($)

In the Hierarchy tab in the Configuration screen, you can define the Value ($) for a single execution of a transaction.

To configure which metrics a transaction will be calculated for

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select a biz. transaction from the left pane. The selected transaction information is displayed on the right pane.
3. Click the arrow beside the biz. transaction name (left pane) and left-click **Edit**. The Biz. Transaction window opens on the right pane showing available and selected transactions.
4. In the Selected Tech. Transactions list, enter the dollar value for a single execution of the transaction.
5. Click **Save** to save the configuration settings.

Scenario # 8- Deleting a biz. transaction

In the Hierarchy tab in the Configuration screen, you can delete a biz. (business) transaction.

To delete a biz. transaction

1. From the Business Dashboard screen, click **Configuration** to open the Configuration screen and the Hierarchy tab (default).
2. Select a biz. transaction from the left pane.
3. Click the arrow beside the biz. transaction name (left pane) and left-click **Delete**, or click the **Delete** button.

Scenario # 9 - Customizing the Health status

In the Health tab in the Configuration screen, you can customize the criteria used to calculate the Health status for an application group(s) via the Configuration screen Health tab.

To customize the criteria used to calculate the Health status

1. On the Configuration screen, click the Health tab. The Configuration screen Health view opens.
2. Under Health Indicators, click into one of the boxes and enter a whole number value for either of the health indicators (SLA [%] or Availability [%]). (The whole number will become the percent value for SLA and Availability).

> ⓘ When changing a value for either of the two indicators, the other automatically changes accordingly to total a combined sum of 100% for the two indicators.

3. Under Health Thresholds, you have two options to designate Application Health:
   - Click and drag each arrow (up or down) from the bar graph to designate its Health (Good, At Risk, Poor). To click and drag, continue with Step 4 in this procedure.
   - Type a whole number value for each (Good, At Risk, Poor). To type in a whole number for each, see the procedure "To designate Application Heath Poor, At Risk, and Good values" below.

4. Click and drag the graph arrow (upper or lower arrows) up or down to determine the whole number percent value for each Application Health range (Good, At Risk, Poor).
5. Under Application Group Health, click a circle to set the desired Application Group Health. The two options are:
   - Application Group health is that of the worst application in the application group.
   - Calculate Application Group health using the percentile distribution.
6. Click **Save** to save the Health configuration settings.

You can manually type in the Application Health value for Good, At Risk, and Poor. To designate Application Health Poor, At Risk, and Good values

1. Under Application Health, you can first click and type in a whole number value for the Good value. This will define the percentage range for Good.
2. Click the At Risk Health box and type in a whole number value. This will define the percentage value for At Risk.
3. Continue with Step 5 in the procedure "To customize Health status" above.

Scenario # 10 - Enabling/Disabling Auto Refresh

Using the Business Dashboard or Configuration screen, you can both manually refresh the information displayed on the Business Dashboard screen and configure Business Dashboard to automatically refresh the information every five minutes.

To manually refresh the Business Dashboard screen for the selected time frame

- Click **Refresh** on the Business Dashboard toolbar

To configure Business Dashboard to automatically refresh the information for the selected time frame every five minutes

- On the Business Dashboard toolbar, click **Auto Refresh is Off**. The icon will then say **Auto Refresh is On**.

  OR

- In the Display tab in the Configuration screen, check mark the "Auto Refresh" box.