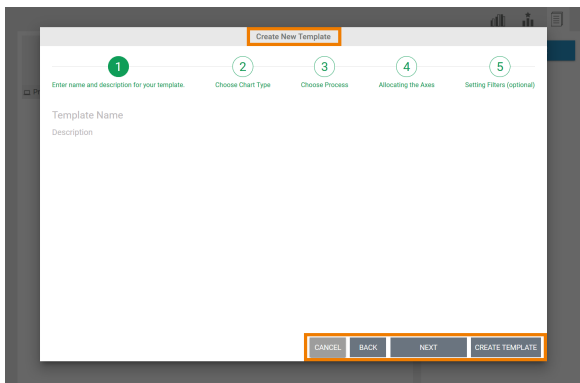


# Creating a Template

This page offers a step by step guide on how to create a new template using the [templates sidebar](#). It is also possible to generate a template from an analysis that has already been created (refer to [Creating a Template from an Analysis](#) for details on this option).

## Creating a New Template

If you wish to create a new template, open the templates sidebar. The four [system templates](#) are shown in the content area (refer to [Using a Template](#) for details). To create a new tenplate, use option **Create New Template**:



The **Create New Template** wizard opens in a separate window. Follow the wizard step by step through the configuration process.

Use the buttons at the bottom to navigate through the wizard:

### On this Page:

- [Creating a New Template](#)
  - [Step 1: Labelling the Template](#)
  - [Step 2: Choosing a Chart Type](#)
  - [Step 3: Selecting a Process](#)
  - [Step 4: Allocating Axes](#)
  - [Step 5: Creating Filters](#)

### Related Pages:

- [Templates](#)
  - [Creating a Template from an Analysis](#)
  - [Editing a Template](#)
  - [Duplicating a Template](#)
  - [Using a Template](#)

- **Cancel:** Closes the wizard without creating a template.
- **Back:** Goes back to the previous step.
- **Next:** Saves the entries and opens the next step.
- **Create Template:** Creates the template in the content area. This option is only enabled if the basis data for a template has been set.

## Step 1: Labelling the Template

Create New Template				
1	2	3	4	5
Enter name and description for your template.	Choose Chart Type	Choose Process	Allocating the Axes	Setting Filters (optional)
<div>ACME Idea Management</div> <div>Bar chart for ACME idea management</div>				
<div>CANCELBACKNEXTCREATE TEMPLATE</div>				

In the first step, you have to enter a title and a short description for the template.

Option **Next** is only enabled when both the **template title** and **template description** lines have been filled.

The further steps for creating a template are carried out in the same way as for creating an analysis.

## Step 2: Choosing a Chart Type

Create New Template

1

2

3

4

5

Enter name and description for your template.

Choose Chart Type

Choose Process

Allocating the Axes

Setting Filters (optional)

Tachometer

Pie Chart

Line Chart

Area Chart

Area Spline Chart

Column Chart

Bar Chart

Spline Chart

Radar Chart

CANCEL

BACK

NEXT

CREATE TEMPLATE

Choose a chart type for your template. The selected chart type is marked with a colored frame.

The following chart types are available:

- Tachometer
- Pie Chart
- Line Chart
- Area Chart
- Area Spline Chart
- Column Chart
- Bar Chart
- Spline Chart
- Radar Chart

Once a chart type has been selected, you can use button **Next** to proceed to the next step.

Step 3: Selecting a Process

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Create New Template

1 2 3 4 5

Enter name and description for your template. Choose Chart Type Choose Process Allocating the Axes Setting Filters (optional)

☐ Process will be assigned while creating the analysis.

☒ Use this Process:

Profile: acme\_corp

- Catalog
- Customer Database
- Damage Reporting
- Employee Database
- Idea Management
- Subsidiary of New Employee

CANCEL BACK NEXT CREATE TEMPLATE

When creating an **analysis**, the process on which the analysis is to be based must be defined.

When creating a **template**, you have a choice: you can select the process later or assign a process to the template immediately.

The wizard automatically lists all processes that provide data to process mining.

The name of the process and the name of the profile in which the process is saved are displayed.

Is the process displayed for the process mining?


the list? In order for data from the integration or BPaSS component to be transferred to processing, the


corresponding process must have been run at least once.

## Step 4: Allocating Axes

The screenshot shows the 'Create New Template' dialog with five steps. Step 4, 'Allocating the Axes', is the active step. On the left, under 'Instance Attribute', a list of attributes is shown, with 'Step Duration' selected and highlighted by an orange box. On the right, there are two input areas: 'y-axis' and 'x-axis'. The 'x-axis' area contains a circular arrow icon. At the bottom, there are buttons for 'CANCEL', 'BACK', 'NEXT', and 'CREATE TEMPLATE'.

The two areas for the content of the x and y axis are located on the right hand side of the dialog.

- Dimensions are displayed on the x-axis. They are marked with the symbol .

- Key indicators are displayed on the y-axis. They can be identified by the symbol .

In distribution charts (all chart types except **tachometer**), key indicators can also be displayed as a dimension on the x-axis.



Reference Configuration for order



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Create New Template

Enter name and description for your template. Choose Chart Type Choose Process Allocating the Axes Setting Filters (optional)

Instance Attribute

- Current Step
- End Date
- End Event
- Host
- Last Update
- Process ID
- Process Name
- Start Date
- Start Event
- Process Count
- Process Duration
- Step Duration

y-axis

Step

Sort Criteria

Step

x-axis

Step Duration

Aggregation

Average

CANCEL BACK NEXT CREATE TEMPLATE

Drag & drop the instance attributes you want to use from the list into the axis areas on the right.

Once you have defined all the necessary instance attributes, you can create the template.

If you wish to save filters for the template, select **Next** at this point to open step 5 of the wizard.

## Step 5: Creating Filters

It is not mandatory to define a filter when you create a new template, this step is optional. Filters can still be added when you use a template. You have then also the option to delete or edit existing filters.

Create New Template

Enter name and description for your template. Choose Chart Type Choose Process Allocating the Axes Setting Filters (optional)

☒ Applying no filter.

☐ Applying the following filter:

CANCEL BACK NEXT CREATE TEMPLATE

In step 5, the option **Applying no filter** is selected by default.

You can still create a template directly without a filter using the **Create Template** button.

Create New Template

✓

✓

✓

✓

5

Enter name and description for your template.

Choose Chart Type

Choose Process

Allocating the Axes

Setting Filters (optional)

☐ Applying no filter

☒ Applying the following filter:

Consider all of the following rules

Field

CANCEL

BACK

NEXT

CREATE TEMPLATE

If you change the option on the **create following filter** function, the filter entry is displayed.

✓

Refer to Configuring Filters for detailed information about all filter settings.

Create New Template

Enter name and description for your template. Choose Chart Type Choose Process Allocating the Axes Setting Filters (optional)

☐ Applying no filter  
☒ Applying the following filter:

Consider any of the following rules

Process Duration	<	1 week	Y	Y	Y
Host	like	%acme%	Y	Y	Y

Consider all of the following rules

Last Update	is not defined	:	:	Y	Y	Y
Current Step	is not defined	:	:	Y	Y	Y

CANCEL BACK NEXT CREATE TEMPLATE

You can create as many filters as you wish. Filters can also be nested to any depth.

When you have created the filters you want, use the **Create Template** button to add the new template to the content area.

The user-defined template is added to the template list in the content area:

