

The Case Explorer (Analysis View)

After selecting the Case Explorer for your new component (see Figure 3.7), you will be prompted with the **Case Configuration** screen shown in Figure 3.10. Basically you could just click **Done** now and the component would already be functioning with the default settings. However, it might make sense to adjust some of the settings to your personal preferences.

The Case Explorer displays data in a process model as well as in a table. Therefore, you will find options for configuring both parts in the Case Configuration menu.

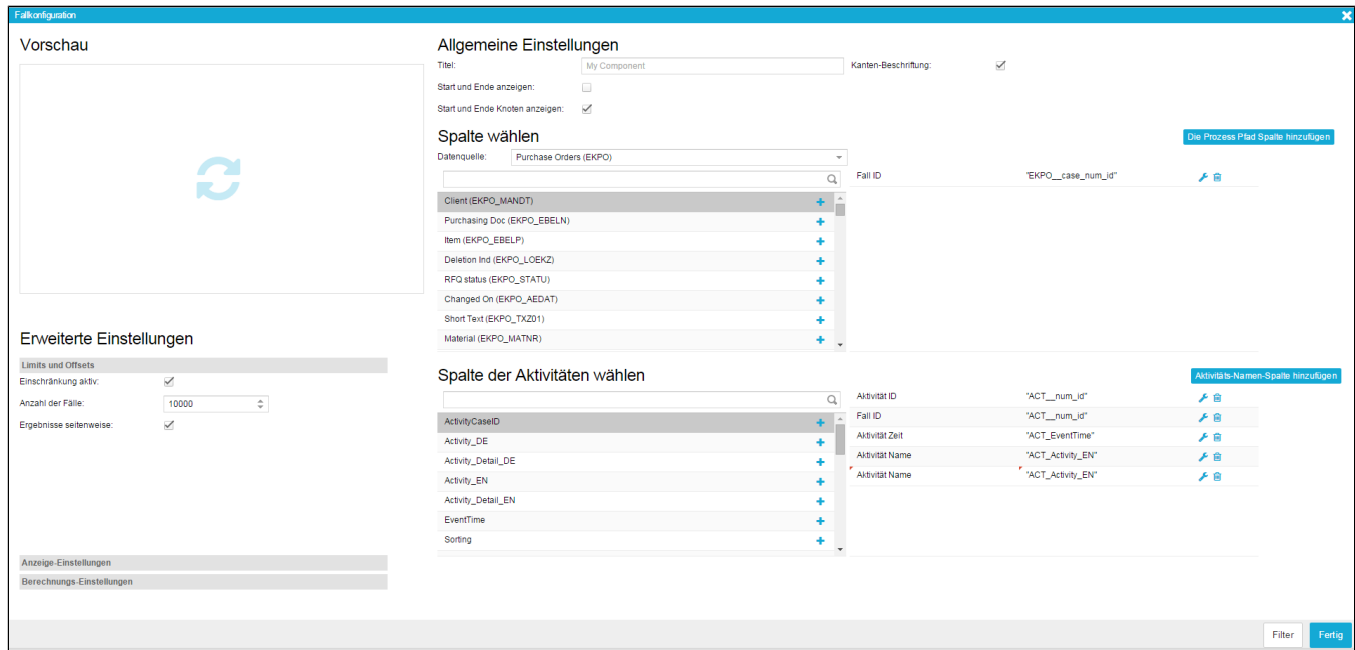


Figure 3.10: Case Explorer - Configuration

Preview

The preview slot is the most easily understandable part of the configuration screen. While configuring your Case Explorer, simply click on the slot to see what your current explorer looks like. That way you can easily try different forms of presentation for your data and select the one most suitable for your purposes. Since the preview slot does not update automatically, you need to click on it every time you want changes to appear.

Main Settings

In the Main Settings you can specify a title for your Case Explorer as well as choose between different general options for presentation.

- **Title:** Use a meaningful title for your Case Explorer, which will be shown directly on top of it. If you do not think a title is necessary, the field can be left empty.
- **Show Start/End:** This option affects the process model. If it is activated, the number of cases beginning or ending in a process node will be represented by red (cases ending there) and green (cases starting there) columns inside the node. Depending on the number of cases, the columns will grow in size.
- **Show Start/End Nodes:** Activating this option will insert nodes representing the start and end points into the process model. All processes will then start with the "Start"-node and end with the "End"-node.
- **Edge KPI:** This option affects the process model. Choose the KPI you want to display on the process edges. Of course, switching between KPIs is also possible when viewing the Case Explorer. If you do not select an Edge KPI, "Count" - showing the number of cases passing through a process edge - will be selected by default.
- **Add Process Path Column:** Activating this option will include a Process Path Column into your Cases and Activities Table. The Process Path Column displays the process path of each case as a sequence of differently colored dots (each activity is assigned one color). That way, cases with similar process paths can easily be identified. An example of the process path column can be seen in [Figure 14](#Fig14).

Advanced Settings

Limits and Offsets

- **Enable Limit:** Activate this option if you want to enable the setting of a limit to your data. The result set will then be limited to the number of cases specified in the field below. Please note that the selection of the data will depend on your sorting settings. Information about how to set sorting options will be given in [The Case Explorer \(Analysis View\)](#).
- **Number of Cases:** Specify here the number of cases you want to limit your result set to. This does only cause an effect if the "Enable Limit" checkbox is activated.
- **Pageinate Records:** If the result set of your table is big you can use this option to distribute results across different pages. Once you have scrolled to the end of the table and more data is available, a bar will appear enabling you to load more data on request.

Appearance Options

- **Show Border:** After enabling this box, a subtle border and shadow will be shown around the Case Explorer, giving it a more elaborated look.
- **Show Tool Border:** After enabling this box, a subtle line will be shown between the actual Case Explorer and the navigation bar, containing its title and editing options.
- **Width of Case Table (%):** Insert a numerical value between 10 and 90 to define the width of the Case and Activities Tables on the left side of the Case Explorer. A value of 10 will lead the Case and Activities Tables to take up 10% of the space provided in the Case Explorer. If you do not specify the Case Table width, the default value is 50.
- **Background:** Here you can choose a background color for the process model part of the Case Explorer. When clicking into the input field, a color picker will appear. Standard colors like "black", "red", "blue", "yellow" and "green" can also be defined via text input (please note that for the Cases and Activities Tables you will have to define the background color directly in the column settings described in later on).

Choose Column(s) and Choose Activity

Choose Data Source

Directly below the headline "Choose Column(s)" you will find a field labeled "Data Source". Here you can select the table you want to choose your columns from. The tables you can select depend on the data cube you selected when creating a new document (as explained in [Chapter 3.2](#)). Depending on your selection, the columns available will adapt automatically.

Please note that the selection of a data source only has an effect on the "Choose Column(s)" section since the columns available in the "Choose Activity" section will always be extracted from the respective activities table.

Choose Columns

The "Choose Columns" and "Choose Activity Column" section shows all columns available depending on the Data Source you selected. To add a column simply click on the "+" icon. The column will be added to the column list on the right side of the "Choose Column(s)" or "Choose Activity Column" section and if you want to apply any changes you can start configuring it by clicking the small screwdriver icon. The configuration of columns will be explained in the following sections.

Edit, Delete or Change Order of Columns

- **Edit:** To edit the settings of a column, click on the screwdriver icon appearing next to it. You will be forwarded to the edit menu which will be explained in the next section.
- **Delete:** To delete a column, click on the small rubbish bin icon appearing next to it.
- **Change Order:** To change the order of columns, simply click on the respective list entry and drag-and-drop it to the desired spot.

Edit Columns

The configuration menu is the same for the configuration of Case Explorer columns as well as for the configuration of dimension and aggregation settings for charts and tables. Therefore, some of the menu items do not have any effects for Case Explorer columns. The following section will concentrate **only on the settings relevant for Case Explorer columns**. The rest of the settings will be explained in the context of configuring charts and tables later in this section.

Name, Formula and Sorting

- **Name:** The name you specify here will be shown on top of the column in the Cases and Activities Tables. In general, it is recommended to assign meaningful names making it easy for users to understand the content of the column.
- **Formula:** This field usually stays unchanged. However, advanced users can define the content of their columns via PQL Syntax. All PQL functions can be used in this field, making it a very powerful instrument to adapt columns to individual needs.
- **Sorting:** Here you can define if sorting should be used at all and whether it should be ascending or descending. Sorting will be done according to numerical order for numerical data types, chronological order for date types and alphabet for strings. Please note that only one column in each of the "Choose Column(s)" and "Choose Activity Column" sections can be considered for sorting, so assigning sorting to several columns within one section does not make sense.

Font and Format

Font

- **Font Color:** Choose the color of the font within the column either by using the color picker appearing once you click into the input field or by typing the labels of common colors such as "black", "white", "red", "blue", "green" and "yellow".
- **Font Size:** Specify the size of the font.
- **Font Weight:** Choose between normal or bold weight. Bold weight will affect the width of the font stroke and put emphasis to its content.
- **Alignment:** Choose between left, right and center to align the font either to the right side, the left side or the center of the column.

Format

- **Number Format:** Here you can specify the format of the data values. The drop down menu contains a number of predefined formats to choose from. However, formats can manually be adjusted in the Format Code field right next to the dropdown menu.
- **Format Code:** Here, formats for data values will appear if you choose a predefined number format. You can also adjust formats manually by using the formatting options for numbers and dates described in [\[Chapter 4.4\]\(#formattingoptionsfunctions\)](#).

Table Appearance

- **Background:** If desired you can choose a background color for your table. Choose either by using the color picker appearing when clicking into the input field or by typing common color labels such as "black", "white", "red", "blue", "green" and "yellow". This option only causes an effect for the columns within the Cases and Activities Tables. For all the process model, a background color can be specified in the Appearance Options.

- **Flex:** Define the column width relative to the other columns used in the table. For example, if Flex = 2, the column will be displayed twice as wide as columns with Flex = 1.

Filters

In the lower right corner of the Case Explorer Configuration menu you will find the **Filters** button.

The **Filters** button is available in most components and gives you the possibility to define a filter that will be applied only to this component. If you apply a filter, only the data conforming to the filter criteria will be chosen as basis for the Case Explorer. For the definition, any statement made in PQL Syntax can be used.