

KWizCom Corporation



KPI App

User Guide

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INTRODUCTION

GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product Overview
- Installation Guide
- Administration Guide

PRODUCT OVERVIEW

With the KPI app you can quickly highlight data in your list/library views, by configuring rules for the display of various KPI icons and progress bars in your list views.

+ new task or **edit** this list

All Tasks All Tasks - large page Calendar ...

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Task Name	Due Date	Assigned To	% Complete	Task Status	Calculated
<input type="checkbox"/>	<input type="checkbox"/>	task-1	October 23, 2015	KWizCom Support	20%	In Progress 	20%
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	task-2	October 13, 2015		100%	Completed	100%
<input type="checkbox"/>	<input type="checkbox"/>	task-3	October 1, 2015		90%	In Progress 	90%
<input type="checkbox"/>	<input type="checkbox"/>	task-4			80%	In Progress	80%
<input type="checkbox"/>	<input type="checkbox"/>	task-5	October 9, 2015		50%	In Progress 	50%

KEY FEATURES

Feature	KWizCom KPI app
Display KPI icons	✓
Display progress bars	✓
Support dynamic tokens such as [Me] and [Today]	✓

INSTALLATION

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint Server 2013/2016 configured for app hosting
- SharePoint online (Office 365)

CLIENT REQUIREMENTS

- Windows 7+
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version).

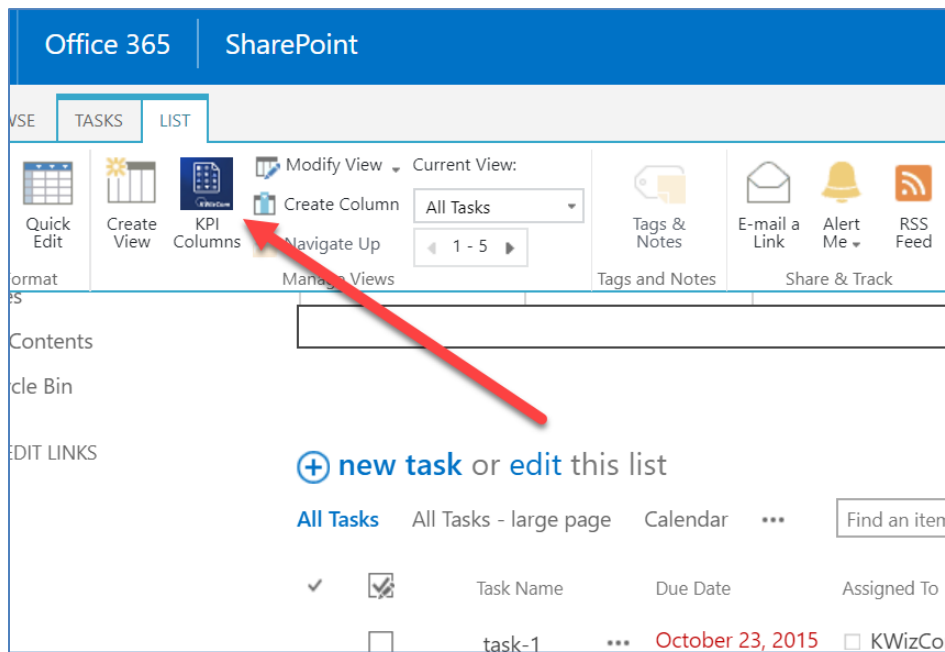
INSTALLATION PROCEDURE

To download and install this app follow the instructions in the [app's web page](#).

ADMINISTRATION GUIDE

SETTING-UP KPI'S

After you install the KPI app, you will see its ribbon button in every list's "Manage Views" ribbon:



Clicking this ribbon button will open the list's KPI settings page:



KWizCom KPI Column

Version 1.0 Build 24 Enterprise

License and support services are up to date ⓘ

Tasks › Settings › KPI Column Settings

Use this settings page to better visualize your targets and current status by customizing columns to display key performance indicator icons and progress.

Add or Edit KPI Columns ▾

Select a Column.

Please choose... ▾

Enter column name

Select KPI Type ⓘ

Please choose... ▾

CLEAR SETTINGS SAVE CANCEL APPLY

This settings page allows you to create a new KPI column or to edit existing KPI columns in the list.

The page includes the following properties:

Property	Description
<p>Select a Column.</p> <p>Please choose... ▾</p> <p>Please choose... <new column> cf-delayed tasks cf-priority</p>	<p><new column> - select this option to create a new KPI column. Each column includes a KPI rule.</p> <p>OR</p> <p>You can select to edit any of the existing KPI columns if already created previously.</p>
<p>Enter column name</p> <p>cf-delayed tasks</p>	<p>Type the column name for a new column.</p>
<p>Select KPI Type ⓘ</p> <p>Please choose... ▾</p> <p>Please choose... Progress Bar Icon</p>	<p>Select type of KPI:</p> <ul style="list-style-type: none"> - Progress bar - Icon <p>Each type has different settings.</p>
<p>In case "Progress Bar" type selected</p>	

<p>Select a Base Column ⓘ</p> <p><input type="text" value="% Complete"/></p>	<p>Select which column you would like the progress bar's value to be based on.</p>
<p>Select Progress Bar Value Location ⓘ</p> <p><input type="text" value="On top of the progress bar"/></p>	<p>Select where you would like the value for the progress bar to be located in relation to the progress bar.</p>
<p>Enter Progress Bar Range ⓘ</p> <p>Min Value <input type="text" value="0"/> Max Value <input type="text" value="100"/></p>	<p>Enter the minimum and maximum values for progress bar range. For percentage columns this range is ignored.</p>
<p>Select the Progress Bar Style ⓘ</p> <p>Background Color <input type="text" value="#c6d9f0"/> Meter Color <input type="text" value="#1f497d"/></p>	<p>Select the background and meter color for the progress bar.</p>
<p>In case "Icon" type selected</p>	
<p>Enter Icon Display Rules ⓘ</p> <p>edit icon display rules</p>	<p>This part displays the existing rules if configured, click "edit" to edit existing rules and add new ones.</p>
<p>Select the Field's Value Location ⓘ</p> <p><input type="text" value="Above the icon"/></p>	<p>Select the location of the field's value in relation to the icon.</p>
<p>Select How to Display Multiple Icons ⓘ</p> <p><input type="text" value="Please choose..."/></p>	<p>Select how to display multiple Icons.</p>
<p><input type="button" value="CLEAR SETTINGS"/></p>	<p>Click to remove the KPI settings from the list</p>
<p><input type="button" value="SAVE"/> <input type="button" value="CANCEL"/> <input type="button" value="APPLY"/></p>	<p>Save – save settings and redirect to the list Cancel – cancel all changes and redirect to the list Apply – save settings and remain in the settings page</p>

Example:

The following list view:

+ **new task** or **edit this list**

All Tasks All Tasks - large page Calendar ...

✓		Task Name	Due Date	Assigned To	% Complete	Task Status
	<input type="checkbox"/>	task-1	... October 23, 2015	<input type="checkbox"/> KWizCom Support	<div style="width: 20%; height: 10px; background-color: #0070C0;"></div>	In Progress
	<input checked="" type="checkbox"/>	task-2	... October 13, 2015		<div style="width: 100%; height: 10px; background-color: #0070C0;"></div>	Completed
	<input type="checkbox"/>	task-3	... October 1, 2015		<div style="width: 80%; height: 10px; background-color: #0070C0;"></div>	In Progress
	<input type="checkbox"/>	task-4	...		<div style="width: 90%; height: 10px; background-color: #0070C0;"></div>	In Progress
	<input type="checkbox"/>	task-5	... October 9, 2015		<div style="width: 70%; height: 10px; background-color: #0070C0;"></div>	In Progress

Has the following KPI columns configured:

Select a Column.

Enter column name

Select KPI Type ⓘ



Select the Field's Value Location ⓘ

Enter Icon Display Rules ⓘ

[edit icon display rules](#)

Icon	Tooltip	Conditions
	This task is delayed	(Due Date is less than '[Today]' AND Task Status is not equal to 'Completed')
	Important task	(Priority is equal to '(1) High' AND Task Status is equal to 'In Progress' AND Assigned To contains '[Me]')

Select How to Display Multiple Icons ⓘ

These rules display the  icon for delayed tasks and the  icon for high priority tasks that are in-Progress status and assigned to the current user. In case both icons are displayed, they are configured to be displayed side-by-side.

AND

Select a Column.

Enter column name

Select KPI Type ⓘ


Select a Base Column ⓘ

Select Progress Bar Value Location ⓘ

Enter Progress Bar Range ⓘ

Min Value Max Value

Select the Progress Bar Style ⓘ

Background Color Meter Color 

This rule displays a progress bar in the %Complete column.