

CONNX 13.0 KPiSync User Guide

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KPiSync

Introduction

KPiSync is a Mobile Application to help users "Visualize your Key Business Metrics on any device in real time". The CONNX KPiSync solution was designed with the purpose of providing users with a quick and easy method of delivering Key Performance Indicators from all facets of a business to users via a smart phone or tablet. The KPiSync solution will report key performance indicators from any business server to a mobile device (Windows 8 Phone or Tablet, an iOS Phone or Tablet, and others). There are three components to the CONNX KPiSync solution, the Administrator, the Store Application and the Mobile Application. The Store and Mobile Applications display key performance indicators to the user that is sent from the administrator server.

A sample business use case for the CONNX KPiSync application for reporting sales key performance indicators (using the CONNX Sample data):

Company A has just launched a product called "Steeleye Stout" and the head of marketing wants to track the sales growth in real-time. Using the KPiSync Administrator a key performance indicator is created, {the SQL for the performance indicator is a SUM of all the quantities from all the orders of that product. "SELECT SUM(PRODUCTQUANTITY) FROM Orders_sqlserver WHERE PRODUCTID=35"} This SQL statement returns the total amount of the new product that has been ordered. Then the KPiSync administrator gives the key performance indicator a description so the user knows what the number represents and also puts in target levels for the sales so a user can quickly determine the growth or drop in sales based on the color coding used on the Key Performance indicator. Once the key performance indicator is created it can be scheduled to execute on an interval and sent to all users.

A user of a Windows 8 phone or tablet, that has downloaded the CONNX KPiSync app and logged in will start receiving key performance indicators. Once logged in, the mobile device will contact the server and pull the key performance indicators that are assigned to that user. The KPiSync App will then display the data graphically to the user and color code the result based on the targets set initially. When the replication server has a new key performance indicator or an update, it will send a message to all the devices that are logged in. This notification is displayed to the user(s) and the new key performance indicator will be automatically downloaded and displayed to the user. Any time the user wants to stop receiving notifications, they just log out and the next time they log in they will get the latest key performance indicators.

System Requirements

The system requirements for the CONNX KPiSync administrator are listed in the table below:

Required	Recommended
Windows Vista SP2 / 7 SP1 / Windows 8 / 8.1 / Windows Server 2008 SP2 / R2 SP1 / Windows Server 2012 / R2	Windows Vista SP2 / 7 SP1 / Windows 8 / 8.1 / Windows Server 2008 SP2 / R2 SP1 / Windows Server 2012 / R2
200 GB Free Space	100+ GB Free Space
1 GHz or higher CPU	Dual processor - 2 GHz or higher CPU
512 MB RAM	2 GB RAM
IDE or SCSI disk drive controller	Raid controller or mirrored drive controller
10 MB/second network card or	1 GB network card or LAN connection

WAN connection

The system requirements for the CONNX KPiSync Windows Store App are listed below:

Required
Windows 8 / 8.1 / Windows Server 2012 / R2
2 GB Free Space
1 GHz or higher CPU
512 MB RAM
10 MB/second network card or WAN connection

The system requirements for the CONNX KPiSync Windows Phone Mobile App are listed below:

Required
OS: Windows Phone 8 or above
Mobile device: Windows Phone

The system requirements for the CONNX KPiSync Apple iOS iPhone/iPad Mobile App are listed below:

Required
OS: iOS 7.0 or later.
Mobile device: iPhone, iPad or iPod touch. Optimized for iPhone 5.

The system requirements for the CONNX KPiSync Android Mobile App are listed below:

Required
OS: Android 4.1 and above
Mobile device: Android phone or tablet running Android 4.1 or above

Product Features of the Windows 8 Store/Phone apps.

The KPiSync Administrator allows a user to manage what key performance indicators are displayed to users of the Windows 8 Phone and Store apps. The CONNX KPiSync Windows Phone app allows users to receive performance indicators and notification of changes to their Windows 8 Phone. The CONNX KPiSync Windows Store app allows users to receive performance indicators and notification changes to any Windows 8 device.

The function of the KPiSync Administrator is to add users that will receive performance indicators, create the performance indicators and schedule times to send the latest performance indicators to the users.

User logins must be created, so the Windows 8 device app users can log in and receive performance indicator updates and notifications. The performance indicators will be graphically represented to the users with a green, yellow or red display. This levels at which each color is displayed are set when the performance indicators are created. This is so the user can see quickly if the sales are meeting goals or if an inventory has gotten low. Since the performance indicators will be dynamic, not static data, a

schedule can be set up to refresh each indicator. The schedule can be set to run at many different intervals depending on how fast the data changes. After a refresh runs if the performance indicators has changed it will be sent out to the users.

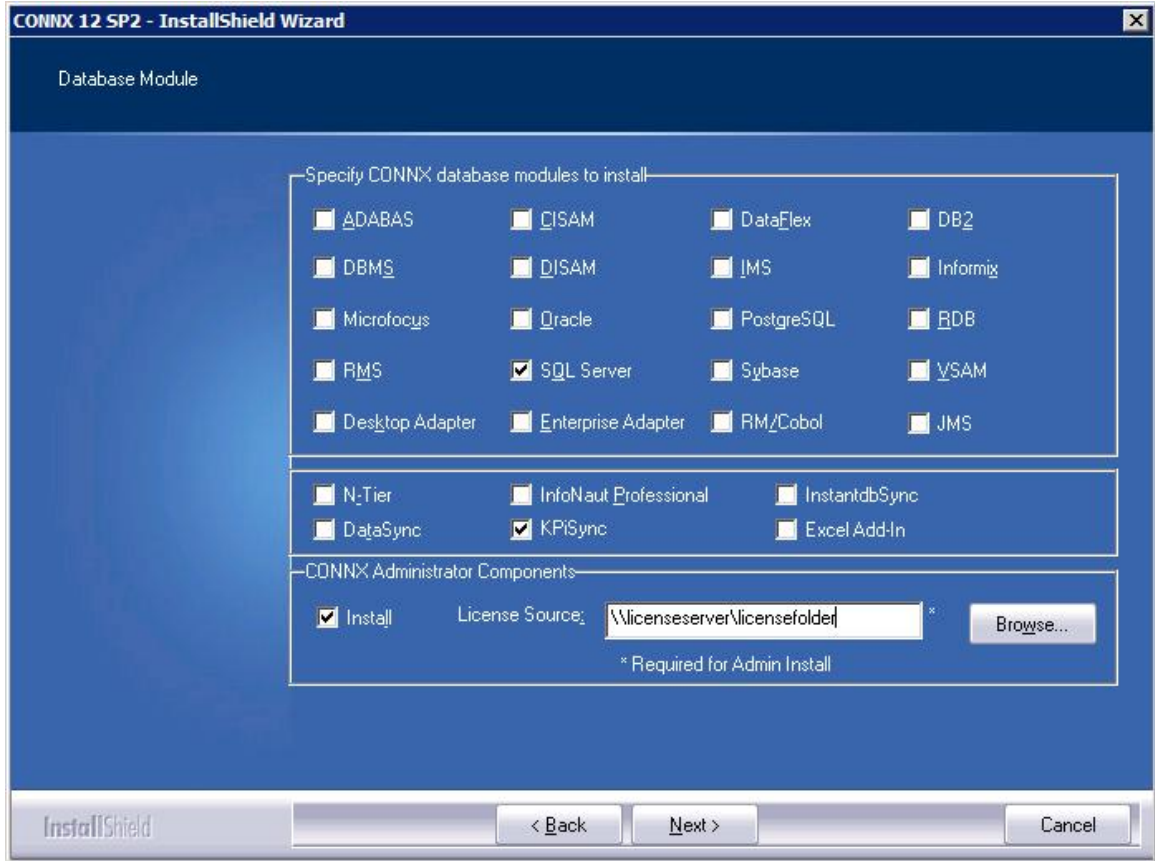
The Windows 8 Store app can be downloaded by any Windows 8 device user so they can start receiving performance indicator information. Once downloaded, all the user needs to do is login with the information provided to them by the administrator and they will start receiving performance indicators and updates. The user can look at all the performance indicators in all the groups together or select a group or even a single indicator to look at. The single performance indicator will show the user all the information about the data. To stop receiving updates the user just needs to log off the KPiSync app.

The Windows 8 Phone app is very similar to the Windows 8 Store app, however it must be downloaded from the Windows 8 Phone store location. Once installed, the user can login with the information provided to them by the administrator and they will start receiving performance indicators and updates. The user can look at all the performance indicators in all the groups together or select a group or even a single indicator to look at. The single indicator will show the user all the information about the data. To stop receiving updates the user just needs to log off the KPiSync app.

Installing KPiSync

The CONNX KPiSync Administrator is installed during a CONNX installation. When the Database Module screen is shown, KPiSync should be checked. It is necessary to have the appropriate KPiSync license. See the **CONNX Installation Guide** for more information.

1. Install CONNX, the **KPiSync** module must be licensed and selected before continuing with installation. Click the **Next** button.
2. **Important:** *If you already have one or more CONNX licenses, you must select the check box for each database for which you are licensed. Failure to do so will cause the license for that database to uninstall.*



3. Once CONNX and the KPiSync Administrator are installed, you may need to **restart** your computer. Please do so if prompted.
4. Confirm that CONNX KPiSync Scheduler Service is running by going to the **Start** menu. Point to **Settings**, and then click **Control Panel**. Click **Administrative Tools**, and then click **Services**. The **Status** column for the service should read **Running**. Close **Control Panel**.

KPiSync Administrator

Log in Tab

To set Log in information

1. If this is the first time logging into the KPiSync Administrator, the **Log in** tab is shown. Once a successful connection has been made that information is saved and used to automatically log in the next time the KPiSync Administrator is opened. Once the connection is made, to get back to this screen to change information select File -> Log out and that will bring up this screen so new connection or data dictionary information can be entered.
2. In the **Log in** tab there are two types of information required. First, the location for the **CONNX Data Dictionary (CDD)** to be used for building the key performance indicators. The second is the **CONNX KPiSync Login Information** user id and password, this is to connect to the mobile service that will update data points on Windows Store and Phone apps.

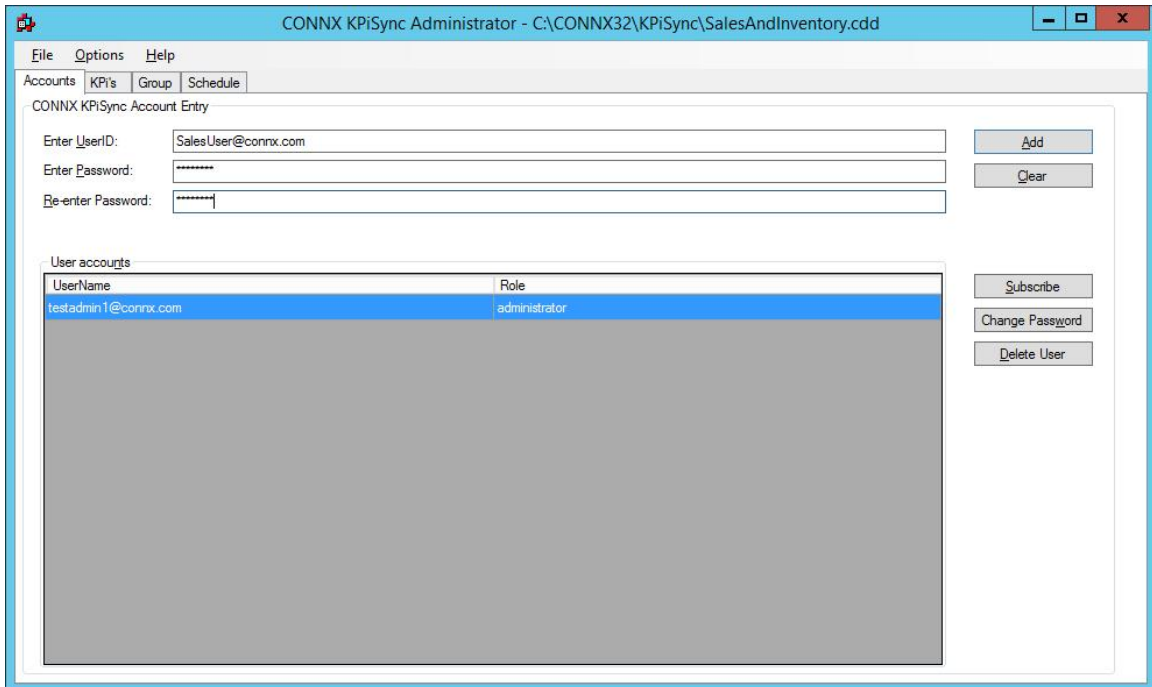


2. Connect to a Data Dictionary by selecting the **Browse** button to bring up a window that can be used to search and select a CONNX Data Dictionary. The data dictionary is what will be used to get data points from the databases and so it can be sent to the Windows Store and Phone apps. The connection to the data dictionary will be opened when the Log in button is pressed after entering the CONNX KPiSync Login Information.
3. For the **CONNX KPiSync Login Information**, enter the administrator user name and password to connect to the CONNX KPiSync service. This administrator account is needed to create users that can log into the CONNX service and receive data point updates. After entering the user name and password, press the **Log in** button to connect.
4. If this is the first time using the CONNX KPiSync service, press the **Sign up** button to set up the CONNX service to receive data points. In order to ensure unique user ID's on the KPiSync server, the user name must be in a valid email address format. Your company's domain name should be used as part of this ID. .

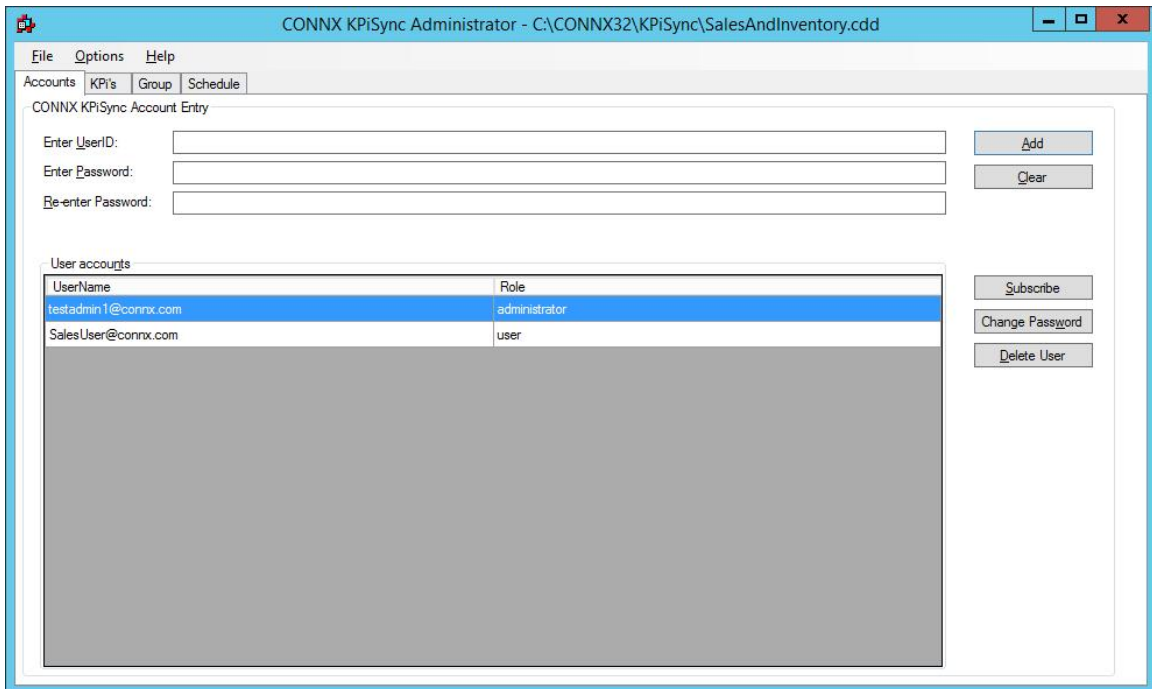
Accounts Tab

Managing user accounts

1. The **Accounts** tab is used to add accounts to send data points to. These accounts will be used by the KPiSync Windows Store or Mobile apps to receive the data points. The users of the Store and Mobile apps will input a user name that was entered here to subscribe to and receive data points.

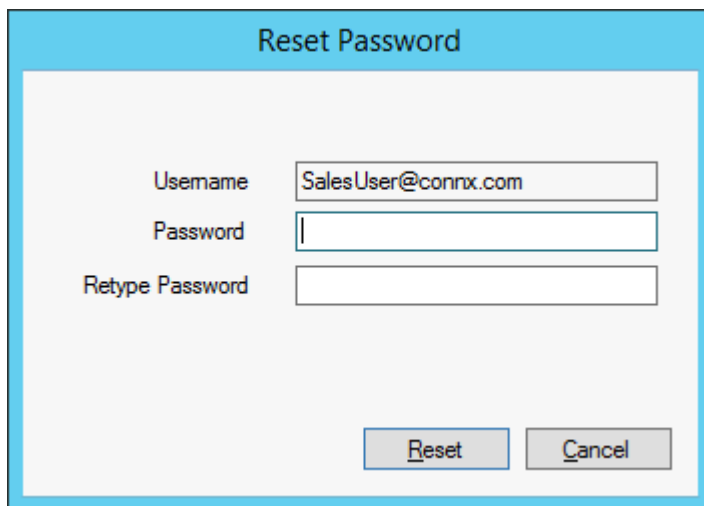


- To add a user, enter a user name in the **User ID** field and a password in the **Password** fields, then press the **Add** button. Note, in order to ensure unique user ID's on the KPiSync server, the user name must be in a valid email address format. Your company's domain name should be used as part of this ID. You will see the user added to the list below.



- If you have entered a user name and password, then decided to change them and start over, press the **Clear** button and the **User ID** and both **Password** fields will have all text removed from them.

- To change the password on an existing account, select the user name from the User accounts list and press the **Change Password** button. That will bring up the Password Reset form, enter the new password and select the **Reset** button and it will save the new password.



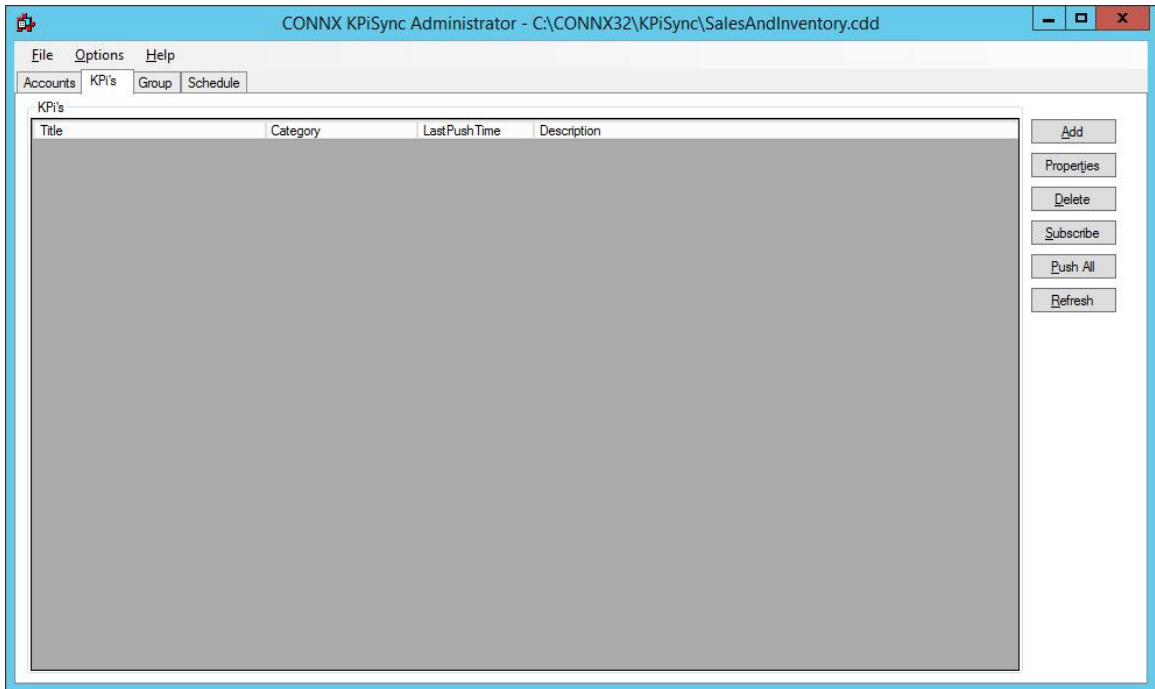
The screenshot shows a 'Reset Password' dialog box. It contains three text input fields: 'Username' (containing 'SalesUser@conrx.com'), 'Password' (empty), and 'Retype Password' (empty). At the bottom, there are two buttons: 'Reset' and 'Cancel'.

- To delete an existing user account, select the user name from the User accounts list and press the **Delete User** button. That will remove the account from any data point updates or scheduled pushes.

KPi's Tab

Adding Key Performance Indicators

- The **KPis** tab is used to add, edit, push, delete and subscribe users to key performance indicators. A key performance indicator is the value and description that will be sent to the KPiSync Windows Store application as well as Mobile applications running on Windows Phone, iOS and Android operating systems.



2. To add a data point, press the **Add** button, the **KPi Properties** screen will appear.

The screenshot shows the 'KPi Properties' dialog box. It features a light blue header with the title 'KPi Properties'. The main area contains several input fields: 'Title:', 'Category:', 'Description:', 'SQL:', and 'Data Preview:'. On the right side, there are buttons for 'OK', 'Cancel', 'Query Builder...', and 'Preview'. Below the 'SQL:' field, there is a section for 'SQL criteria for color ranges:' with three sub-fields: 'Green:', 'Yellow:', and 'Red:'. At the bottom, there is a 'Tile Image' section with a preview image of a person pointing at a bar chart and a list of image options: 'Image1', 'Image2', 'Image3', 'Image4', 'Image5', 'Image6', and 'Image7'.

3. First enter a **Title** for the performance indicator, this title will be what the performance indicator is named when it is pushed to the apps. Then enter a **Category**, this will be used to group the performance indicators together on the Store and Phone apps. Next, write a **Description** of what the performance indicator is, this will be shown when the app users want more information and drill down into the specific performance indicator.

KPI Properties

Title:

Category:

Description:

SQL:

Data Preview:


SQL criteria for color ranges:

Green:

Yellow:

Red:

Tile Image



- Image1
- Image2
- Image3
- Image4
- Image5
- Image6
- Image7

4. A SQL statement is used to actually get the data that will be sent to the Store and Phone apps. A SQL statement can be copied into the **SQL** field, or the Query Builder can be used to create the SQL Query. The SQL Query needs to return a single point of information, aggregations work well.

KPi Properties

Title:

Category:

Description:

SQL:

Data Preview:

SQL criteria for color ranges:

Green:

Yellow:

Red:

Tile Image




Image1

Image2

Image3

Image4

Image5

Image6

Image7

5. The **SQL criteria for color ranges** is for giving a graphical display of what the performance indicator means. For example if the performance indicator is tracking sales, this will tell the user if the sales amount is lower then what is good, getting close to the goal, or it is meeting the goals. This can be displayed with red, yellow or green icons, that way as the sales figure is growing the user will see a green icon when the data has met the goal. the SQL criteria can be in the form "cnxvalue > 80" or just "> 80". If a single number is input with no other criteria it will be treated as an equal when evaluating the number.

KPi Properties

Title:

Category:

Description:

SQL:

Data Preview:


SQL criteria for color ranges:

Green:

Yellow:

Red:

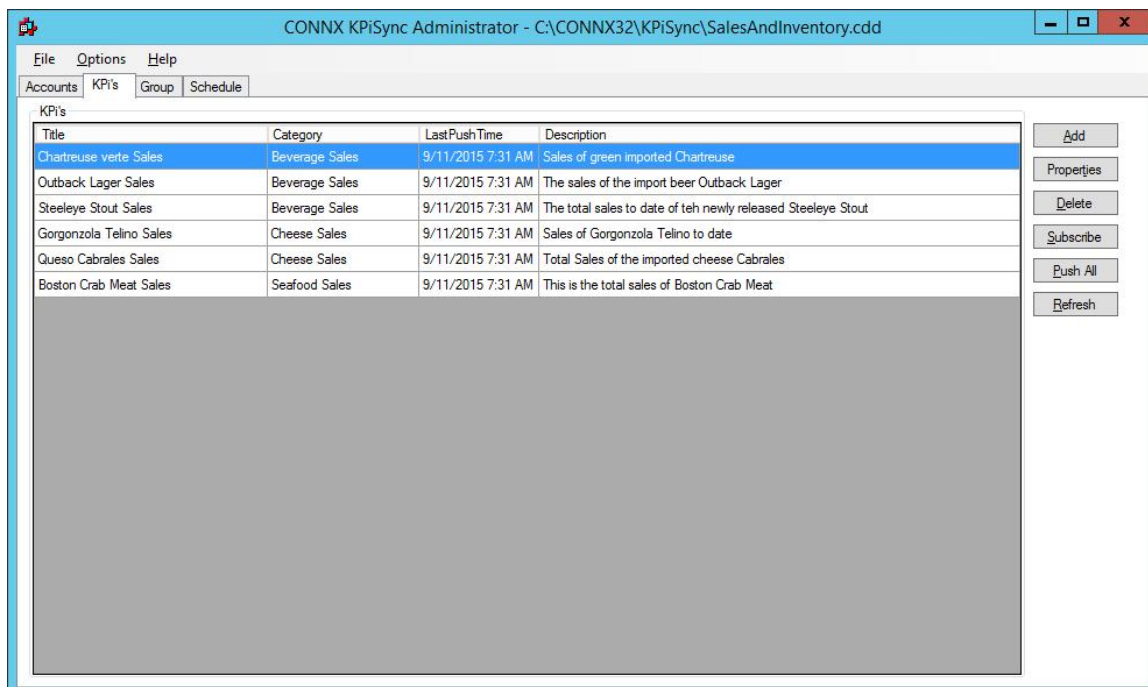
Tile Image



6. In the **Tile Image**, the administrator can choose what graphical icon will be displayed on the users app. There are red, yellow and green versions of each image.
7. Select OK to return to the **KPis** tab, the new performance indicator has now been added to the list.
8. If you wish to specify which users will get updates for the new KPi, please see the chapter on [Subscribing Users](#).

Editing Key Performance Indicators

1. To edit an existing performance indicator: In the list of existing performance indicators, select the performance indicator you wish to edit and then press the **Edit** button. The **KPi Properties** window will appear.



- Use the properties window to change the **Title**, **Category**, **Description** for the performance indicator. If the data returned is not correct, the **SQL** statement that retrieves it can be changed also. At this point the **SQL Criteria** can be edited and a different **Title Image** can be selected. Changes will be saved when the **OK** button is pressed.

KPi Properties

Title: Boston Crab Meat Sales

Category: Seafood Sales

Description: This is the total sales of Boston Crab Meat

SQL: SELECT SUM(PRODUCTQUANTITY) FROM Orders WHERE PRODUCTID=40

Data Preview: 230

SQL criteria for color ranges:

Green: crxvalue > 225

Yellow: crxvalue between 180 and 225

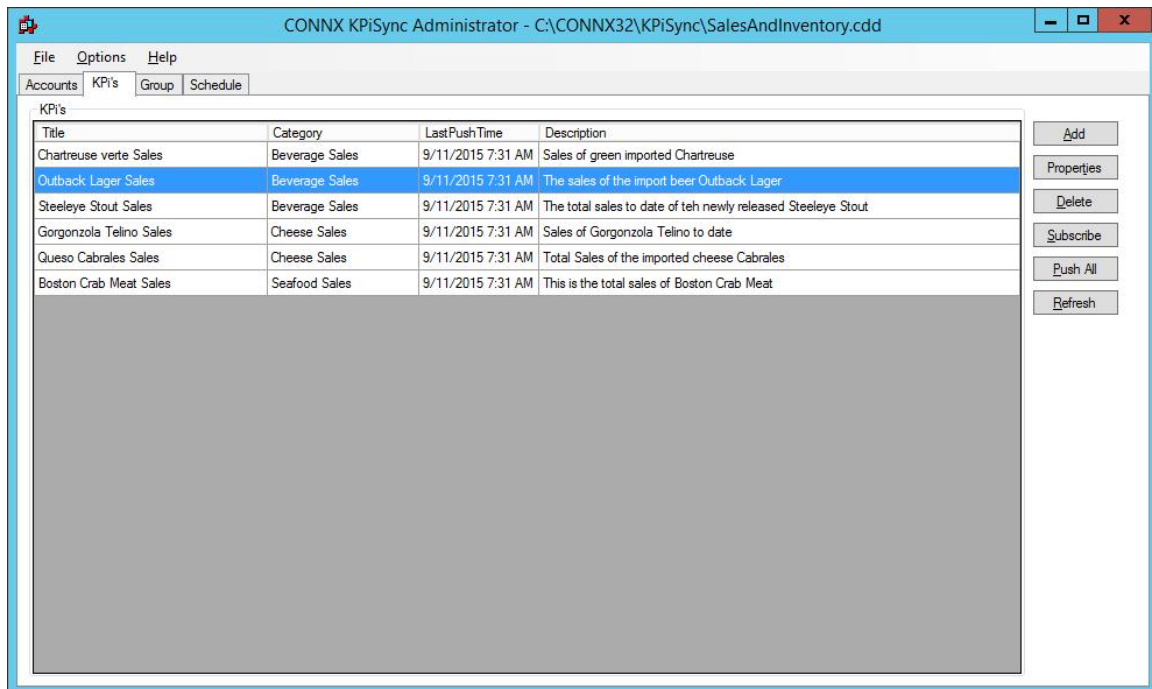
Red: crxvalue < 180

Tile Image

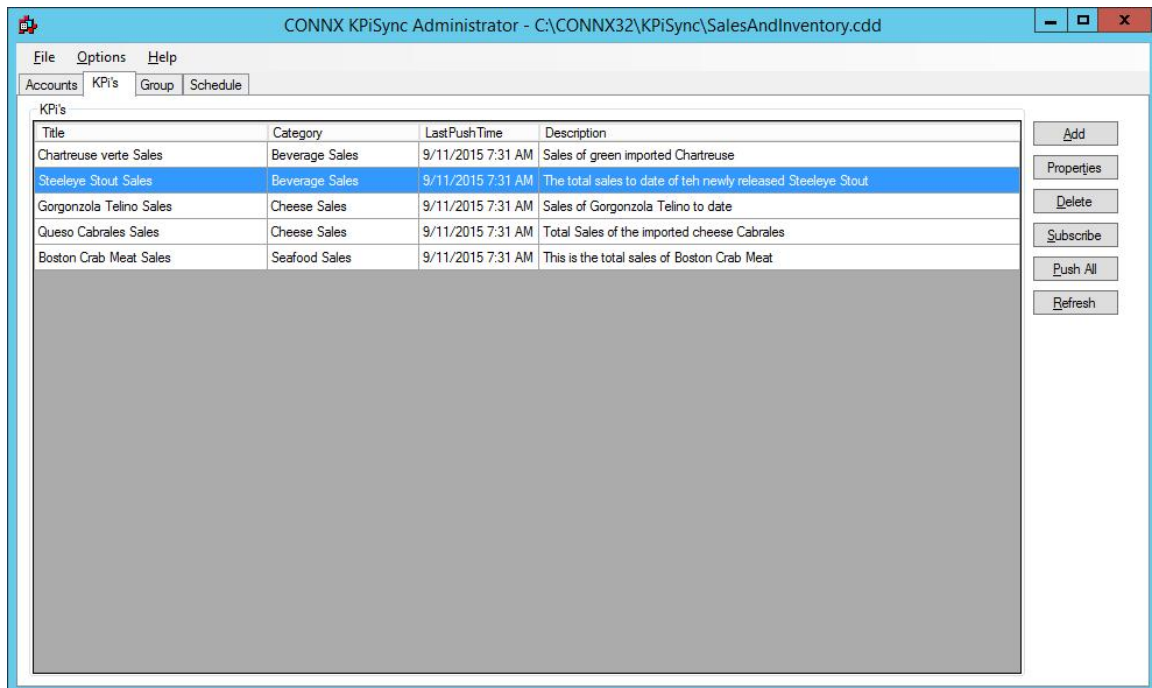
Image1
Image2
Image3
Image4
Image5
Image6
Image7

Deleting Key Performance Indicators

1. To delete an existing performance indicator: In the list of existing performance indicators, select the performance indicator you wish to delete and then press the **Delete** button.



- You will be prompted if you are sure you wish to delete the performance indicator, after confirming the deletion the performance indicator will be removed.



Query Builder

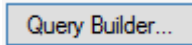
Getting started

Query Builder allows you to build complex SQL queries via an intuitive visual interface.

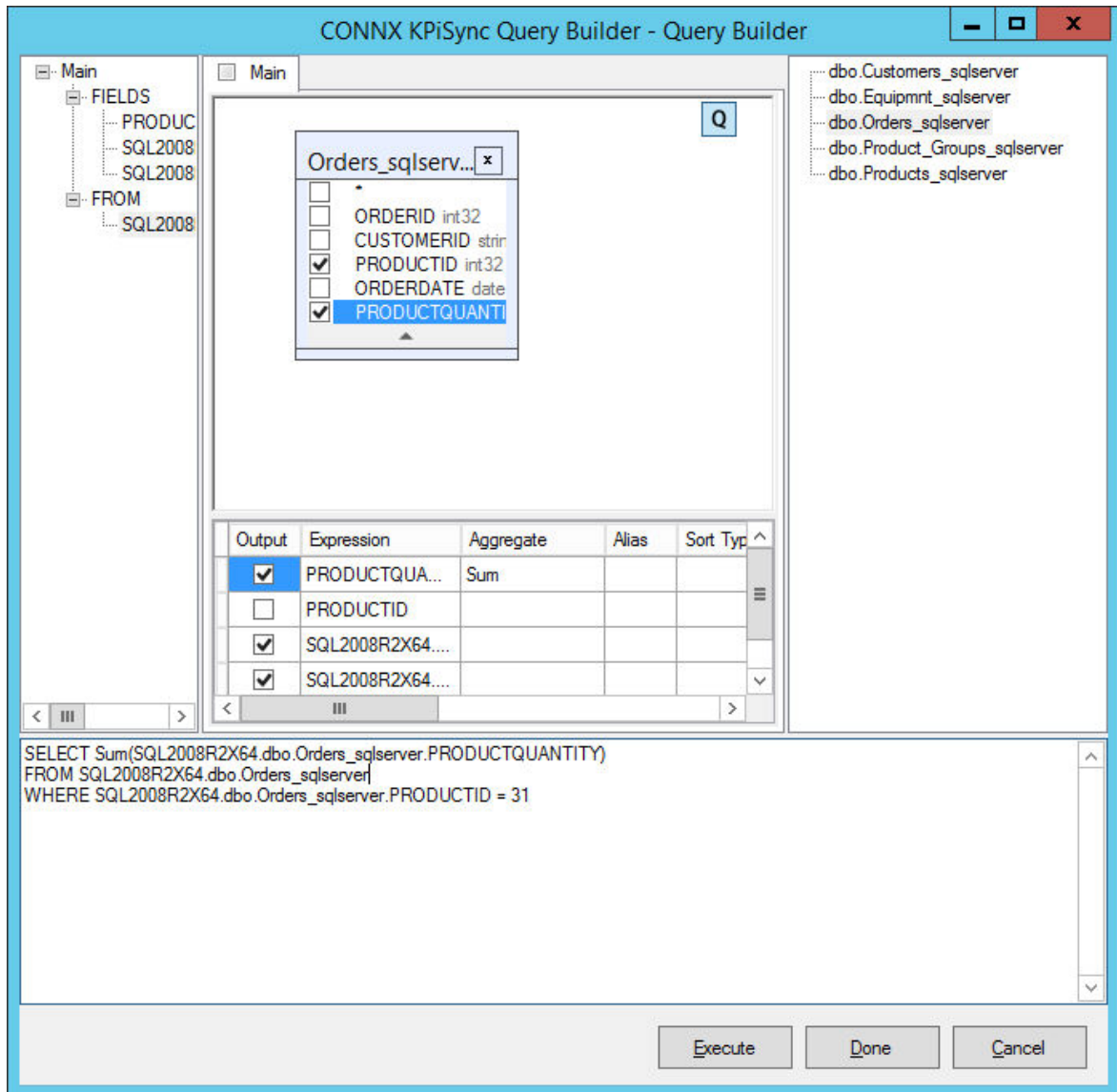
Query Builder will help you to write correct SQL code without technical details. To work with Query Builder, you need to know basic SQL concepts; if you do not understand SQL principles you may not get the desired results.

Opening the Query Builder

1. Click the Build Query button



2. The Query Builder opens in a new window.



The main window can be divided into the following parts:

- The **Query Building Area** is the main area where the visual representation of query will be displayed. This area allows you to define source database objects and derived tables, define links between them and configure properties of tables and links.

- The **Columns Pane** is located below the query building area. It is used to perform all necessary operations with query output columns and expressions. Here you can define field aliases, sorting and grouping, and define criteria.
- The **Query Tree Pane** is located to the left of the query building area. Here you may browse your query and quickly locate any part of it.
- The **Table List Pane** is located to the right of the query building area. It contains a list of all the tables available for query building.

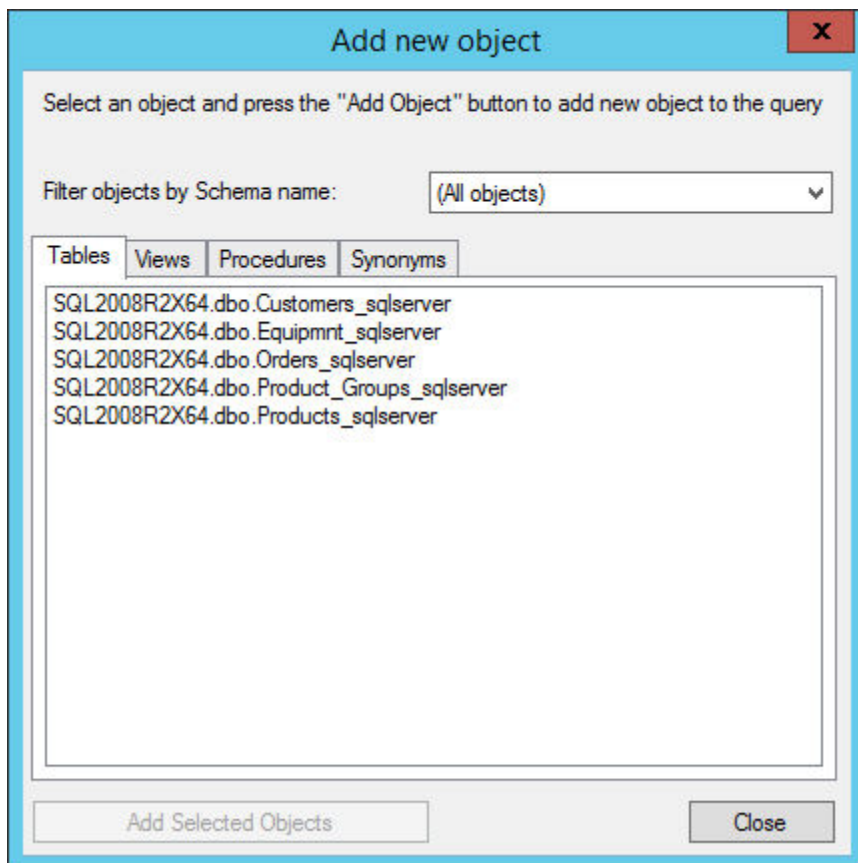
The page control above the query building area allows you to switch between the main query and sub-queries.

The small area in the corner of the query building area with the "Q" letter is the union sub-query handling control. Here you may add new union sub-queries and perform all necessary operations with them.

3. **Exiting the Query Builder.** To exit and save changes to the SQL Query window, select the "Done" button. To exit without saving any changes to the query select the "Cancel" button. The "Execute" button will save the query to the SQL Query entry in the application and also run the query so the results can be viewed.

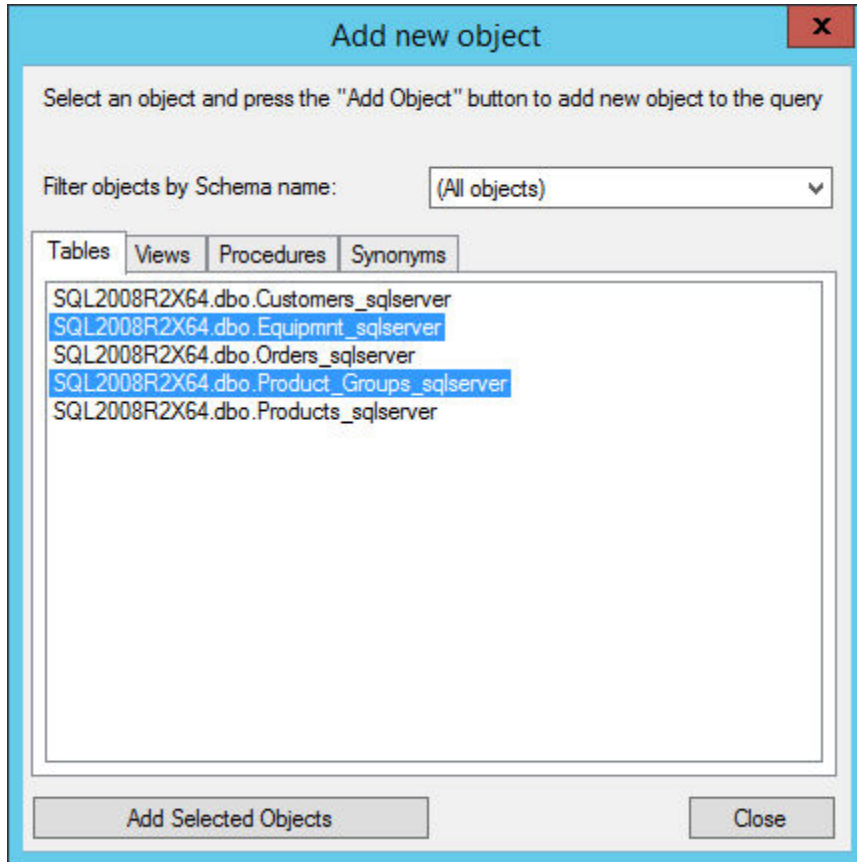
Adding an object to the query

To add an object to the query, right click the query building area and select **Add Object**.



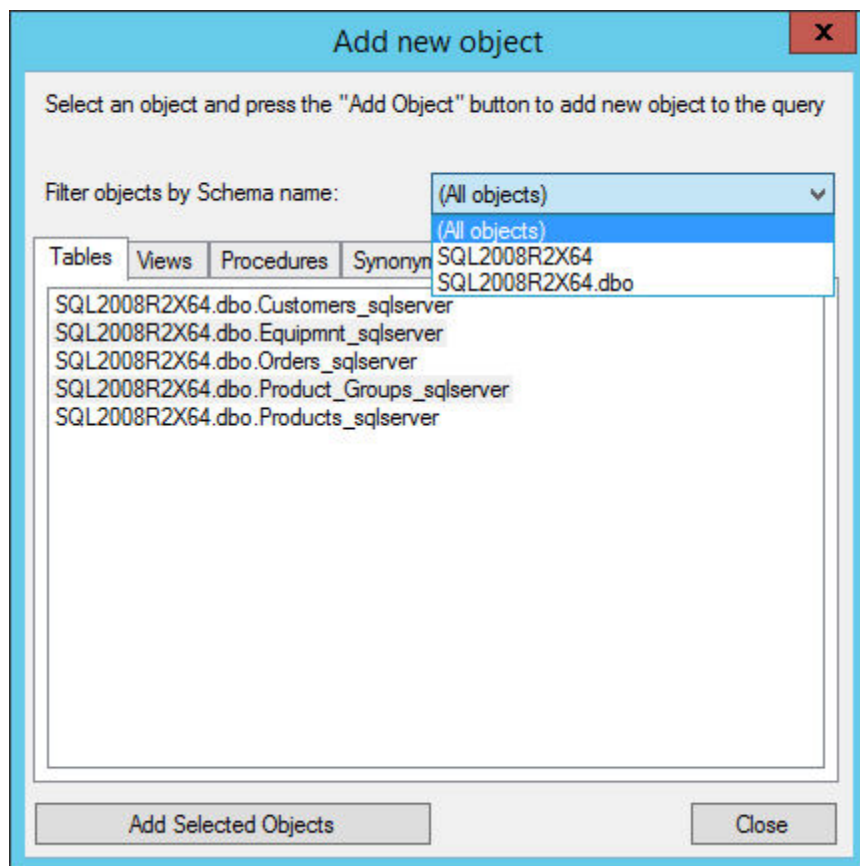
The **Add New Object** window allows you to add as many objects as you wish at once.

The objects are grouped according to their type by four tabs: **Tables**, **Views**, **Procedures** (functions) and **Synonyms**. To select multiple objects to add to the query, hold the **Ctrl** key down, click the object name, and then click **Add Object**. You may repeat this multiple times. After you finish adding objects, click **Close** to hide this window.



To remove an object from the query, select it and click the **Delete** key or simply click **Close** in the object header.

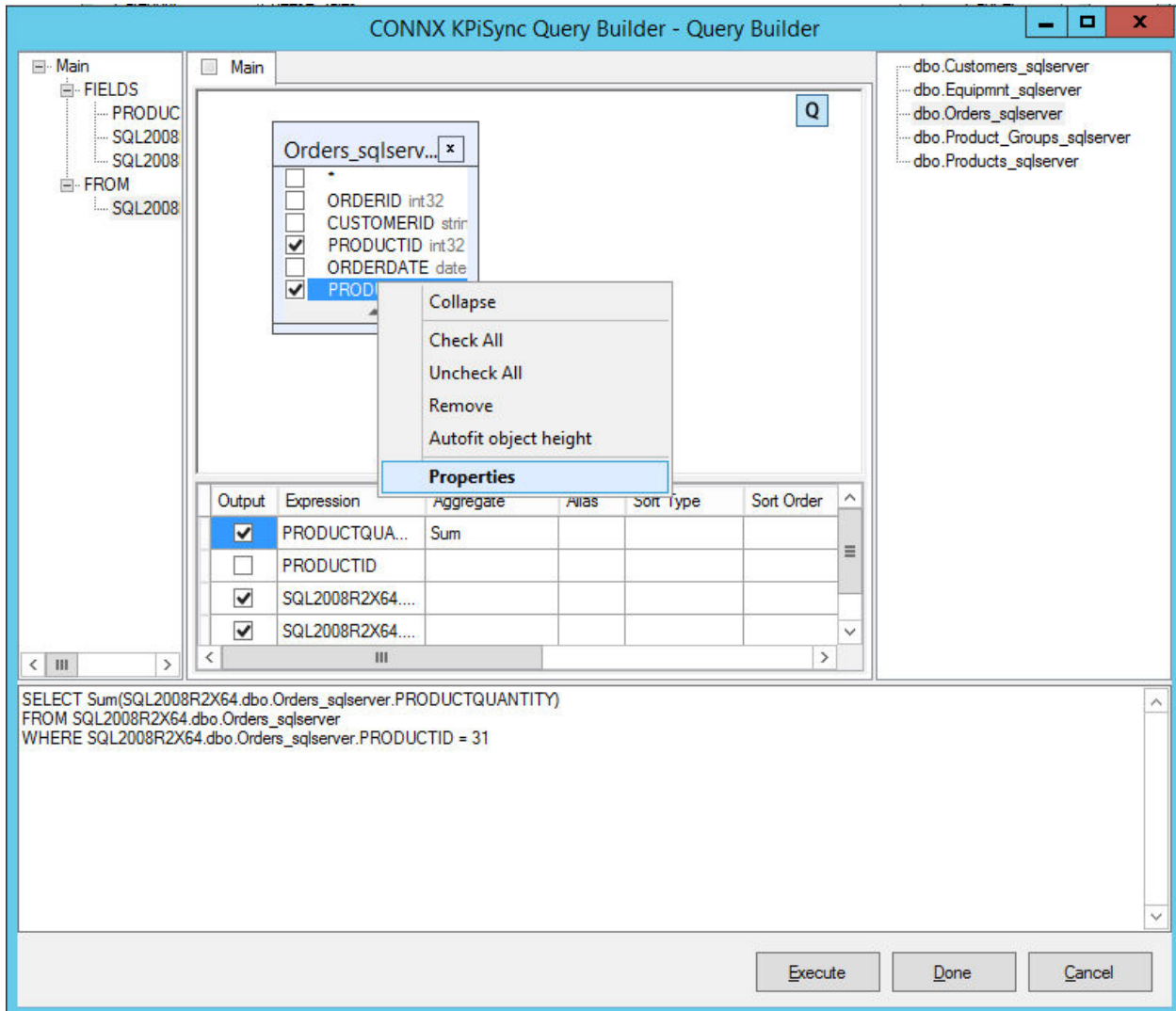
For those servers that have schemas or allow selection of objects from different databases, you may filter objects by database or schema name by selecting the necessary schema or database from **Filter objects by Schema name**.



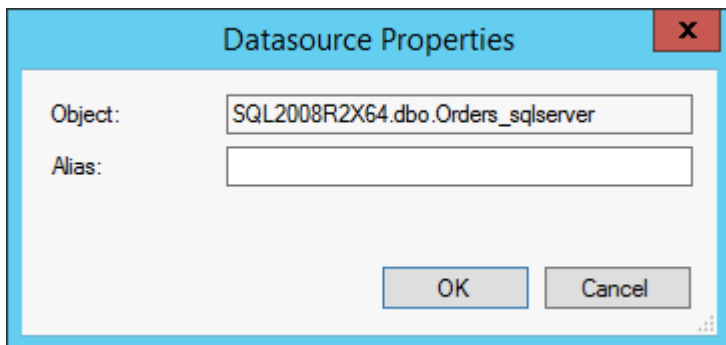
Query Builder can establish links between tables based on the information about foreign keys in the database. This ability is turned on by default. To turn it off, clear **Create links from foreign keys**.

Editing object properties

To change the properties of each object added to the query, right click the object name and select **Properties** item from the drop-down menu or double-click the object header.



The **Datasource Properties** window appears.

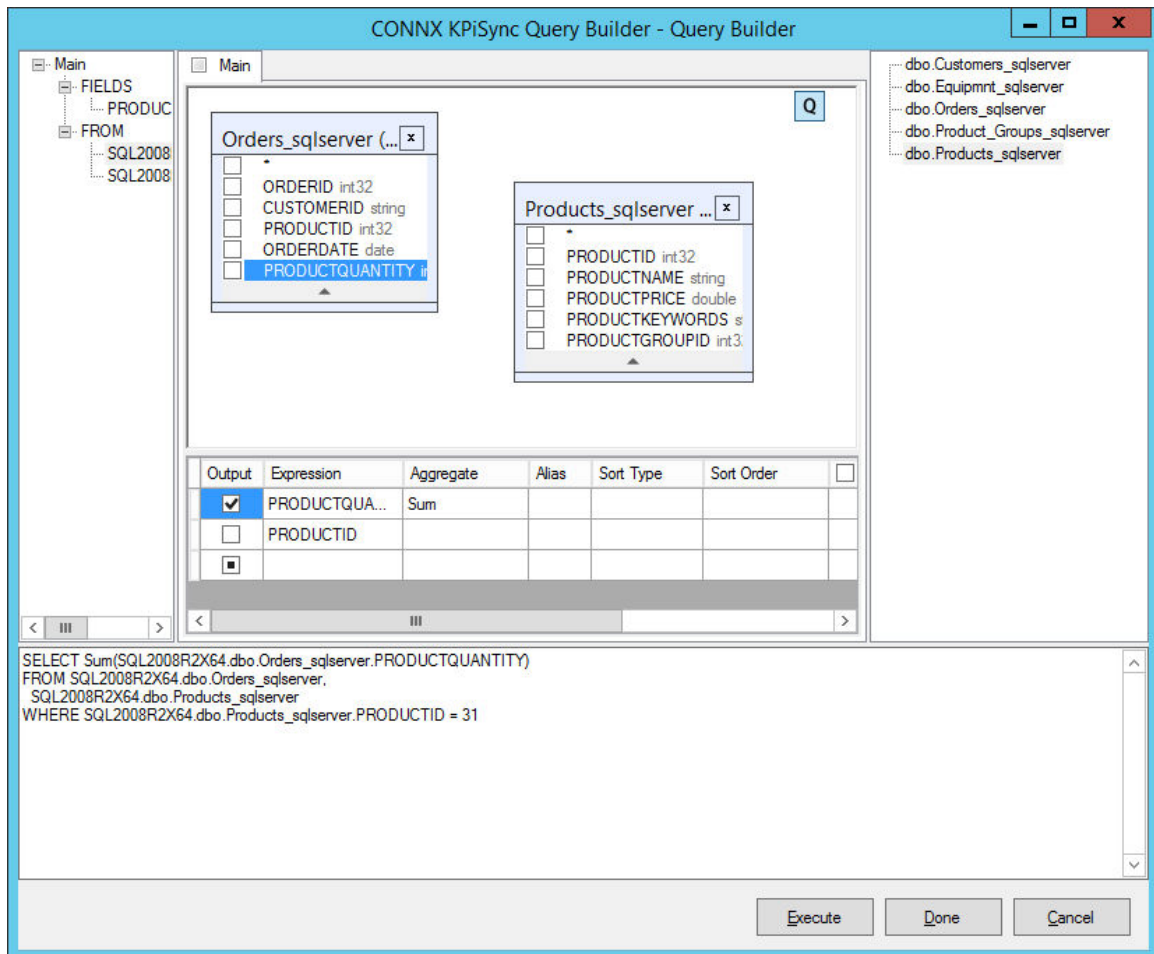


The **Datasource Properties** dialog may vary from server to server, but the **Alias** property is the same for all database servers.

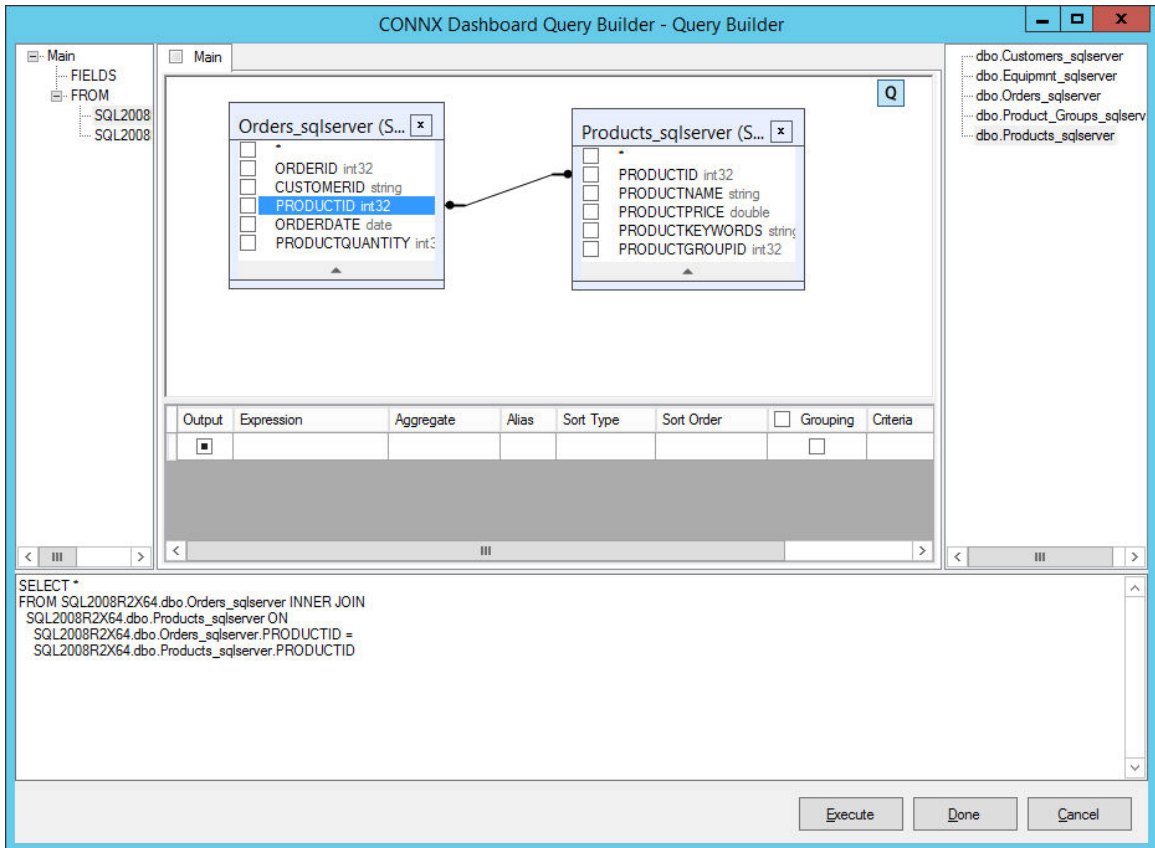
Joining tables

To join tables, create a link between an object in each of the tables.

1. In the Query Builder window, open at least two tables.
2. In the first table, select the field that you want to link and drag it to the corresponding field of the other object.

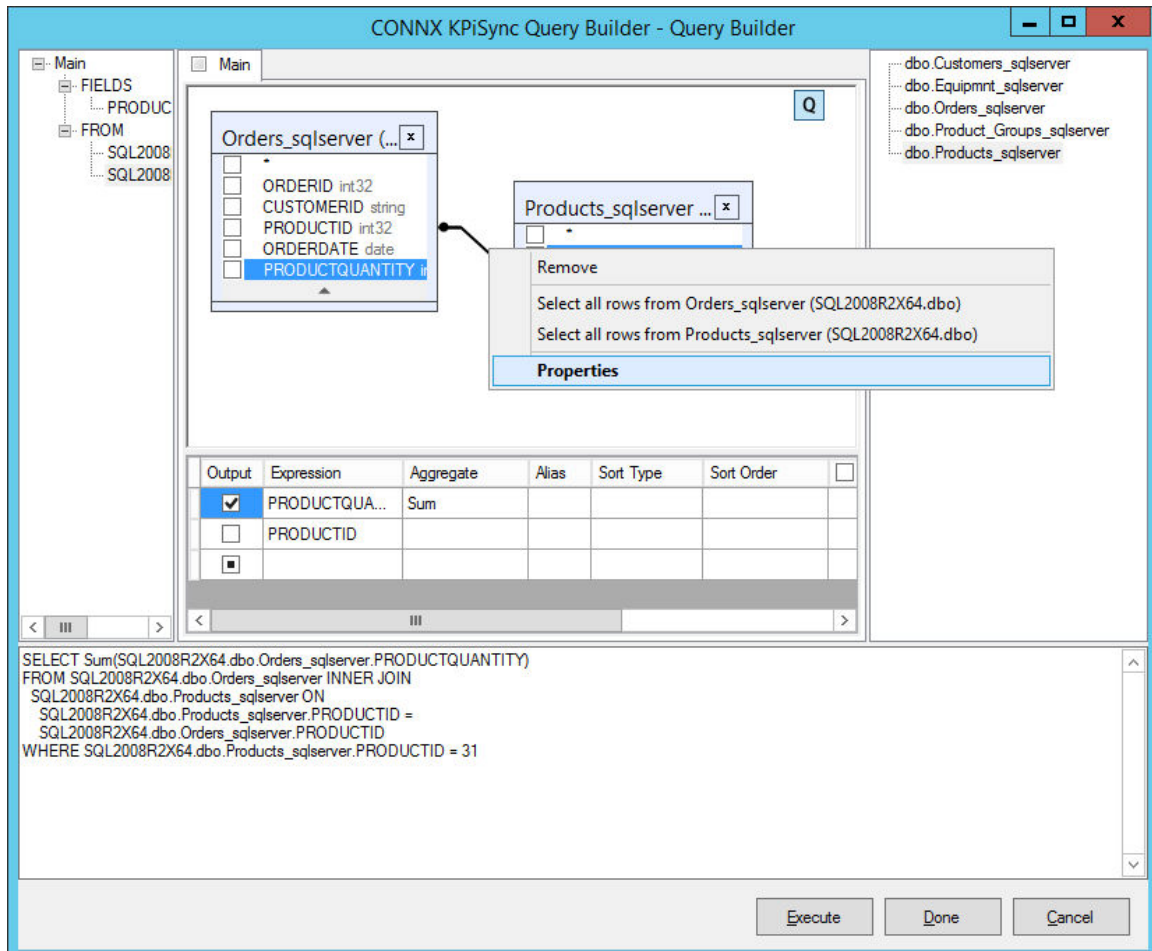


3. After you finish dragging, a line connecting the linked fields appears.

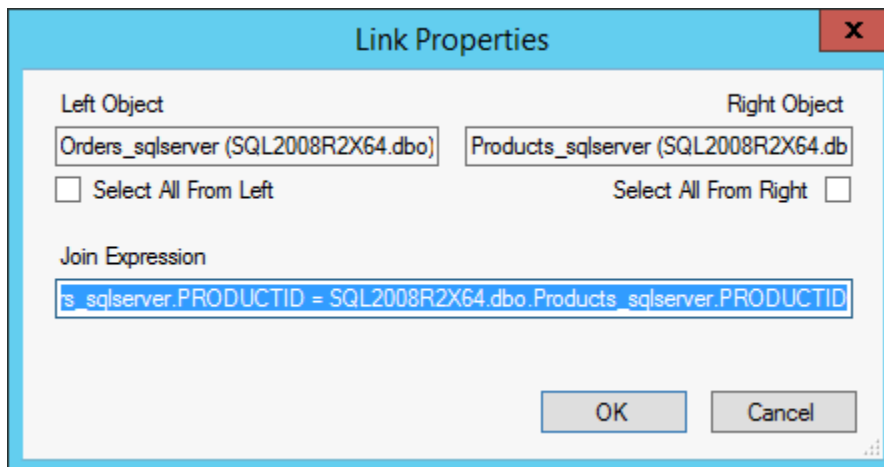


The default join type is INNER JOIN; only matching records of both tables will be included in the resulting dataset.

4. To define other types of joins, right click the link and select **Edit...** or double-click the link.



5. The **Link Properties** dialog box appears.



Using **Link Properties**, you can define join type and other link properties.

6. To remove a link between objects, right-click the link line and select **Remove**.
Selecting output fields

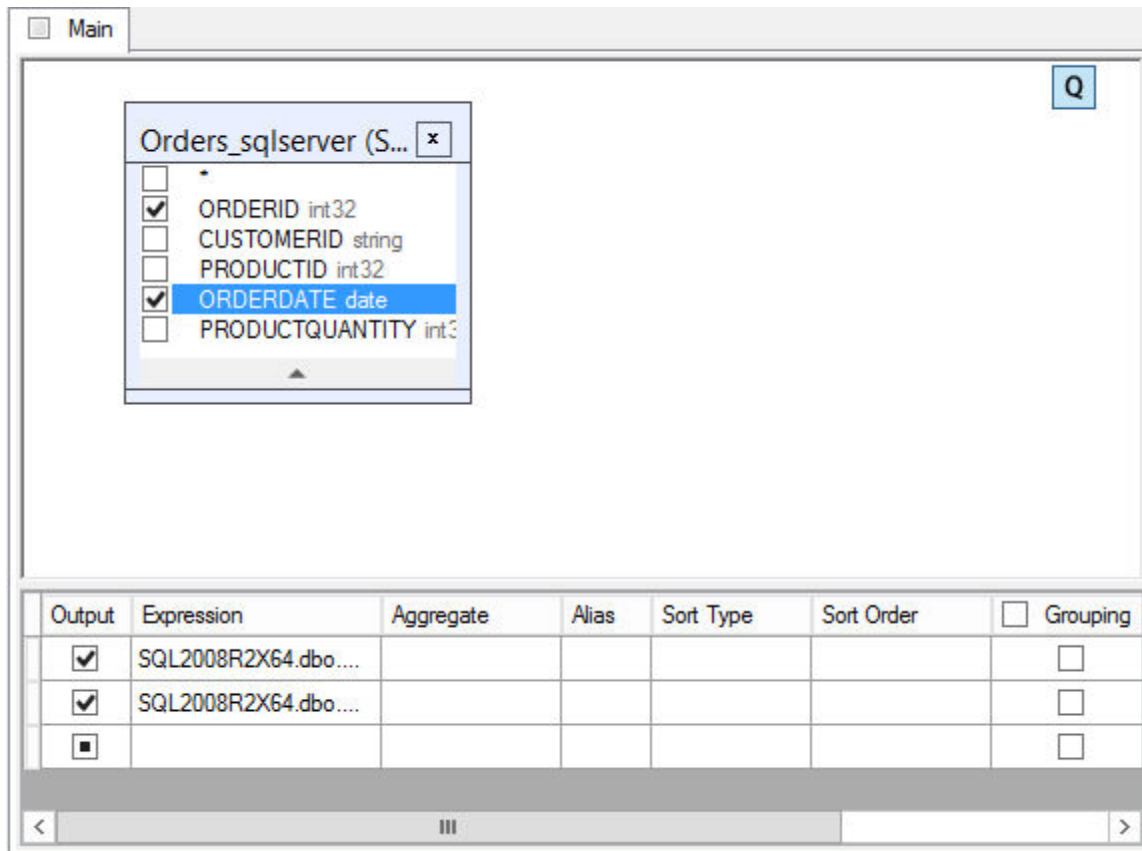
There are several ways to add a field to the query output field list:

- In the Query Building Area select the field name. To include all the fields of the object, select the list item with an asterisk in the field name area.
- In the Columns Pane, select a field name from the Expression column drop-down list.
- in the Columns Pane, enter a valid expression in the Expression column .

There are two way to remove a field from the list of query output fields:

- In the Query Building Area, clear the checkbox at the left of the field name
- Clear the Output column checkbox.

Using the drop-down menu, you can remove lines from the Columns Pane or re-order output by right clicking on the left most gray column.



Define any output field aliases in the Alias column of the Columns Pane.

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	<input type="checkbox"/> Grouping
<input checked="" type="checkbox"/>	SQL2008R2X64.dbo....					<input type="checkbox"/>
<input checked="" type="checkbox"/>	SQL2008R2X64.dbo....					<input type="checkbox"/>
<input type="checkbox"/>						<input type="checkbox"/>

Sorting output fields

Use the **Sort Type** and **Sort Order** columns in the Columns Pane to sort the output query fields.

The screenshot shows a software window titled 'Main'. Inside, there is a dialog box titled 'Orders_sqlserver (S...)' with a list of fields: ORDERID (int32), CUSTOMERID (string), PRODUCTID (int32), ORDERDATE (date), and PRODUCTQUANTITY (int32). The 'ORDERDATE' field is selected. Below the dialog is a table with columns: Output, Expression, Aggregate, Alias, Sort Type, Sort Order, Grouping, and Criteria. The table contains two rows of data. The 'Sort Type' column for the second row has a dropdown menu open, showing 'Ascending' and 'Descending' options.

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	<input type="checkbox"/> Grouping	Criteria
<input checked="" type="checkbox"/>	SQL2008R2X64.dbo.Orders_sqlserver.ORDERID			Ascending	1	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	SQL2008R2X64.dbo.Orders_sqlserver.ORDERDATE			Ascending	2	<input type="checkbox"/>	
<input type="checkbox"/>				Ascending		<input type="checkbox"/>	

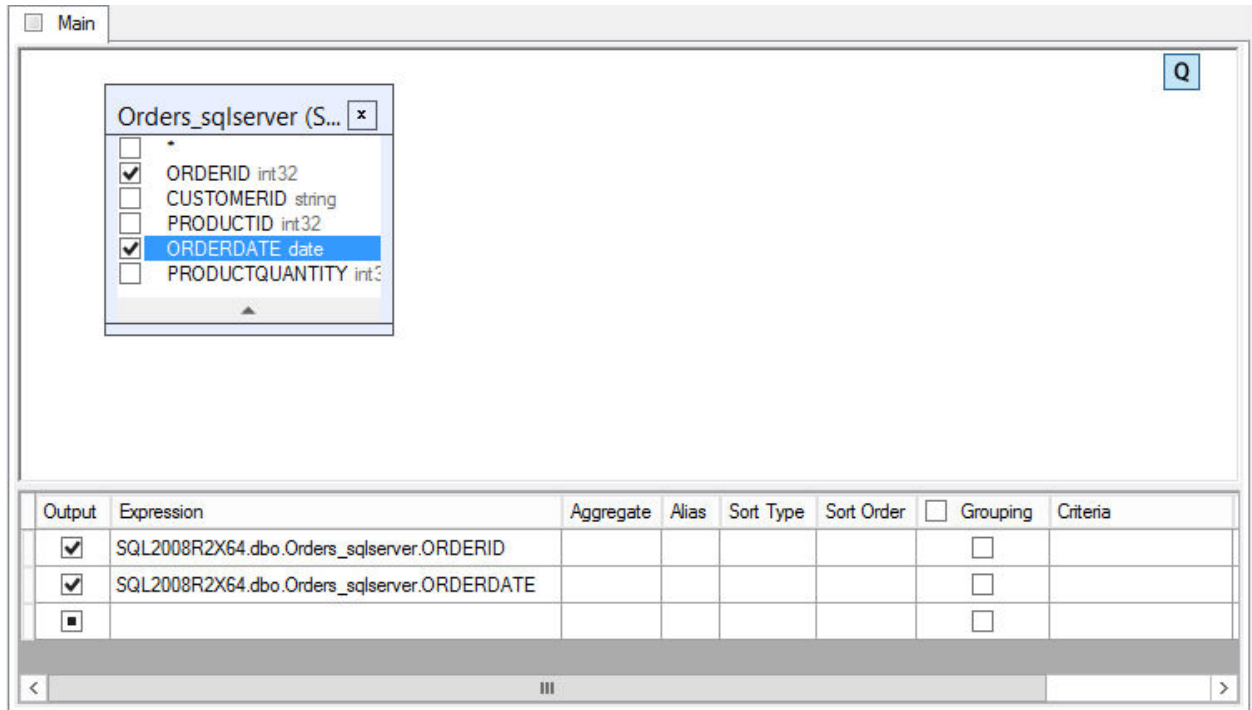
Use the **Sort Type** column to specify if the field will be sorted in ascending or descending order.

The **Sort Order** column specifies the order when multiple field are sorted.

If you don't want to sort by a field, clear it's **Sort Type** column.

Defining expression criteria

Use the **Criteria** column to define query criteria for the expression listed in the **Columns Pane** .



In the **Criteria** column, enter the criterion omitting the expression itself.

If you want to select the those expressions that are greater than or equal to 10 but less than or equal to 20:

```
WHERE (field >= 10) AND (field <= 20)
```

enter

```
>= 10 AND <= 20
```

in the **Criteria** column.

If you have multiple criteria for a single expression, enter each additional criterion in the **Or...** columns. These criteria will be concatenated in the query using the **OR** operator.

Grouping output fields

To setup grouping by some of the fields and/or to define aggregate functions on grouped rows you may use the **Group by** column.

You may select one of the following values for this column from the drop-down list:

- **Expression** and **Where**: These values are used when no grouping is specified. **Expression** is set when this expression is used as an output expression in the SELECT clause and nothing else. **Where** is set automatically when you define a criterion to this expression that results in including this expression to the WHERE clause. Normally you shouldn't care about the value of the **Group By** column when you don't want to define grouping.
- **Group by** and **Having**: These values are similar to **Expression** and **Where**, but used when you want to define grouping in your query. In this case, you should set **Group by** for all columns you want to group by. Specifying criteria for the grouped columns will include these criteria in the

HAVING clause. If you want to include an expression ONLY in the HAVING clause you should set the **Having** value in the **Group By** column for this expression.

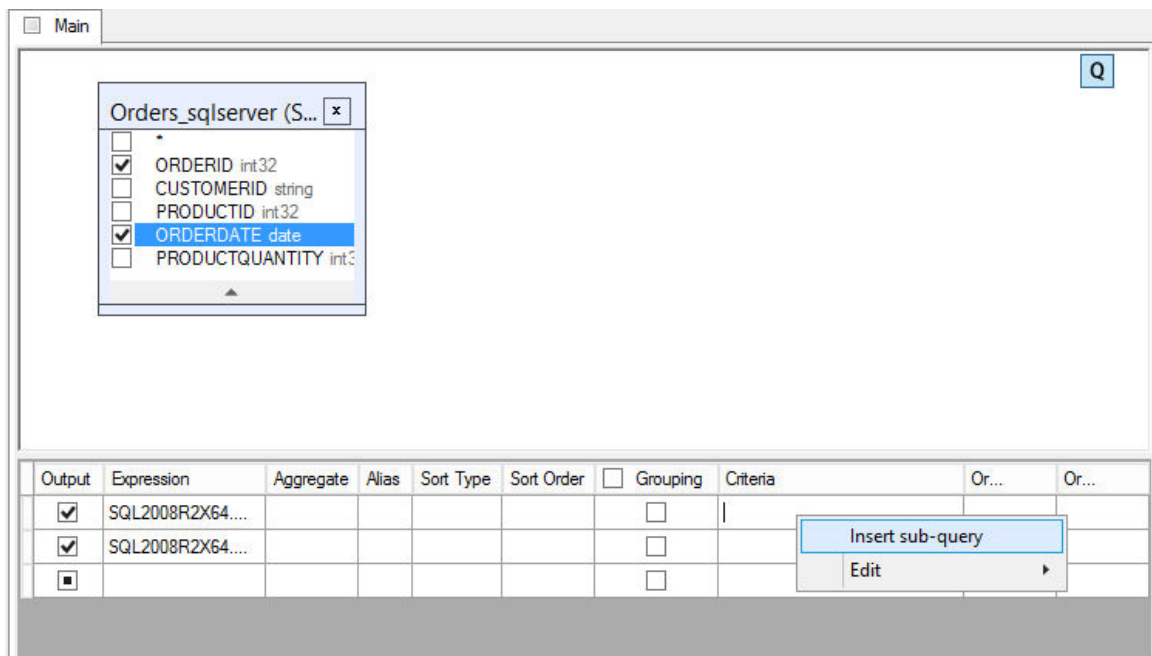
- Aggregate functions (Count, Sum, etc): By selecting one of these values, you will create an aggregate expression for the value indicated in the **Expression** column.

Grouping output fields

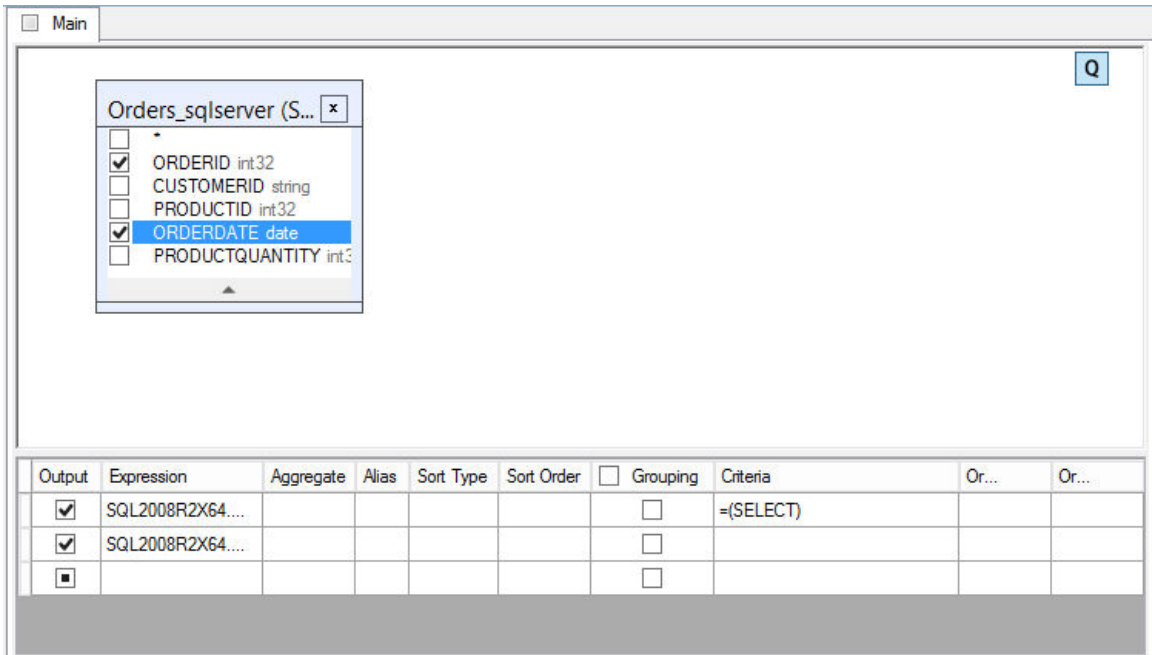
Adding a sub-query

There are two ways to add a sub-query.

- In the Columns Pane, right click on the Expression or Criteria column. From the drop-down menu, select **Insert SubQuery**.



- Type "(Select)" in the Expression column and type either "= (Select)", "In (Select)", or any other valid sub-query expression, in the Criteria column.



CONNX creates a new sub-query tab. Switch to the sub query tab to visually edit the sub-query the same way you edit the main query.

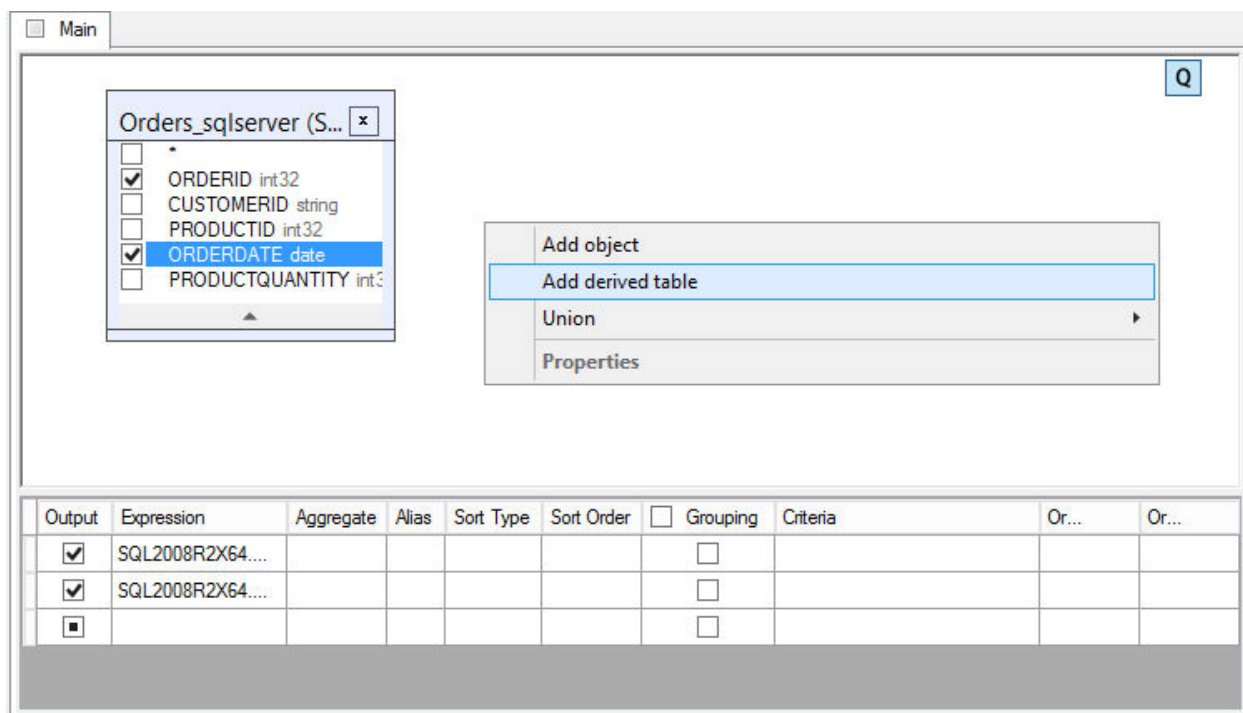
There are two ways to switch to the sub-query tab:

- Click the sub-query tab.
- In the sub-query cell, click the ellipsis button. If the cell contains more than one sub-query, a drop-down menu appears. Select the sub-query you want.

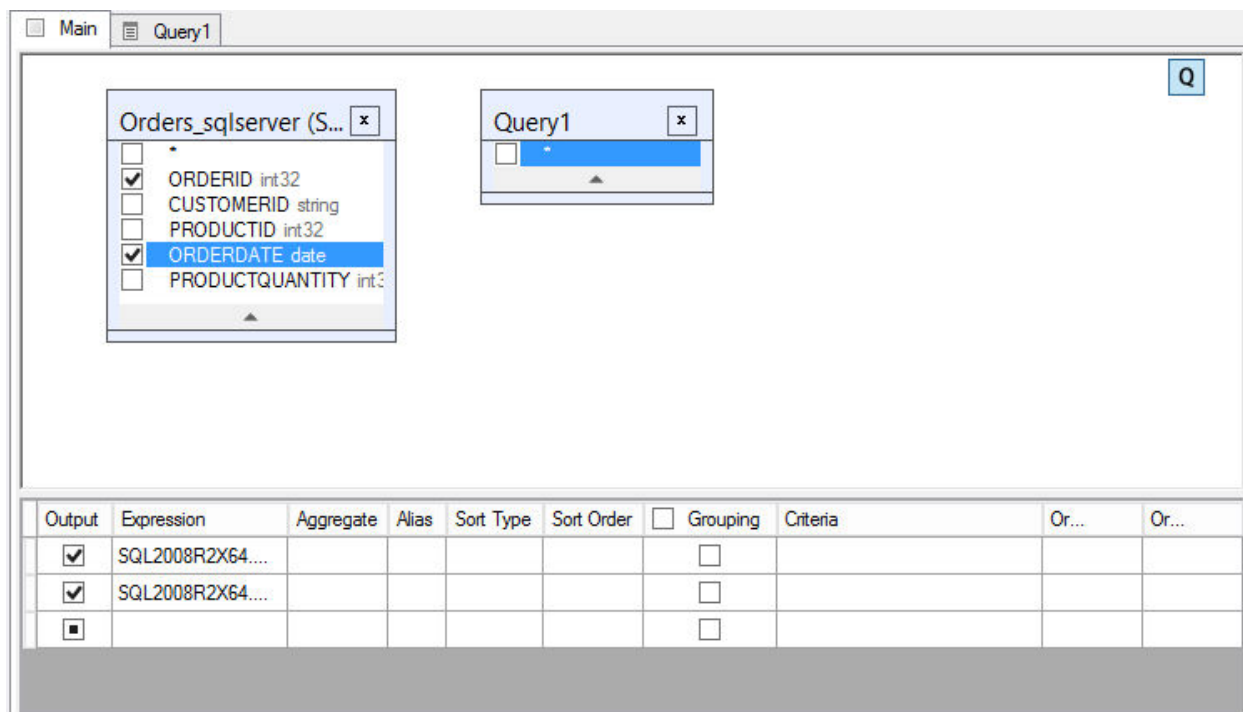
Adding a derived table

Derived tables are a sub-query used in the FROM clause.

To add a sub-query, right click on the Query Building Area and select **Add Derived Table**.



The query building area now contains a object and a corresponding tab representing the newly created derived table. This tab allows you to edit the sub-query the same way as you edit the main query.

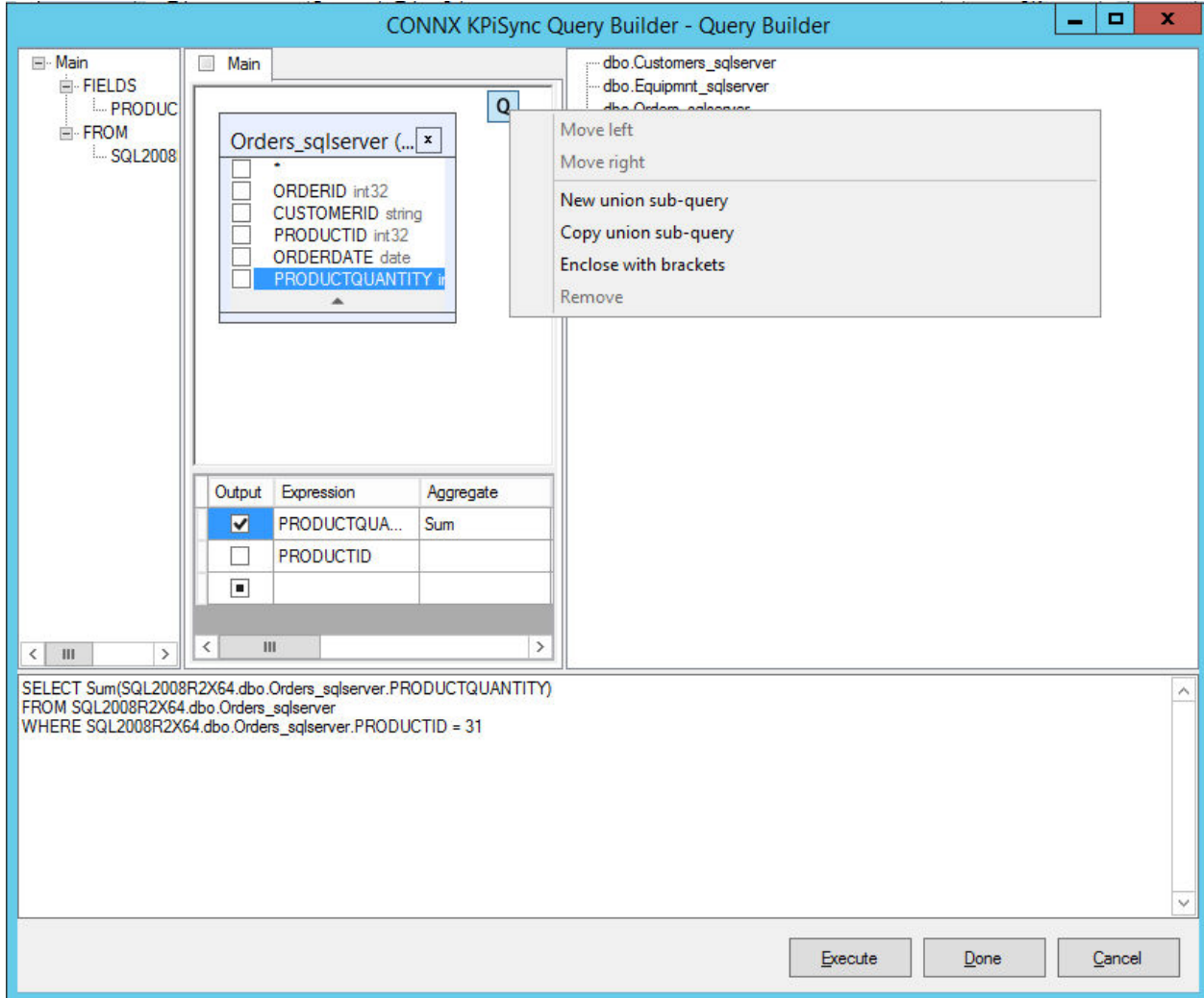


Another way to switch to the sub-query tab is to press the derived table's maximize button.

Working with unions

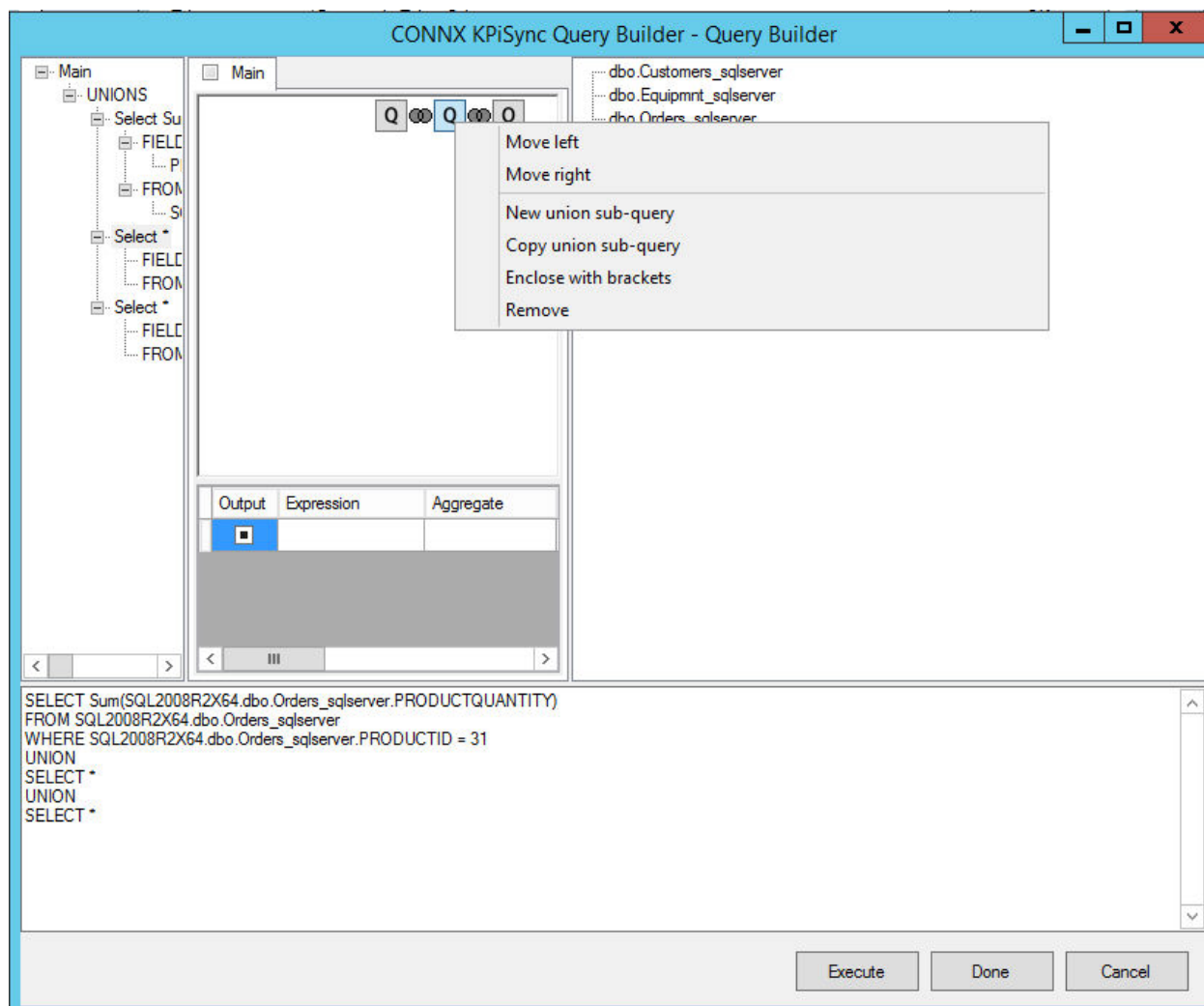
You can work with union sub-queries using the small panel in the top-right corner of the Query Building Area. Initially there is only one union sub-query labeled with the letter **Q**.

To begin working with union sub-queries, right-click the **Q**.



To add a new union sub-query, right-click the **Q** and select **New union sub-query**.

When there are multiple union sub-queries, when you right-click the **Q**, the choices change.



To move the sub-query or bracket to the top of the query (the topmost sub-query is the left one), right-click the **Q** and select **Move Left**.

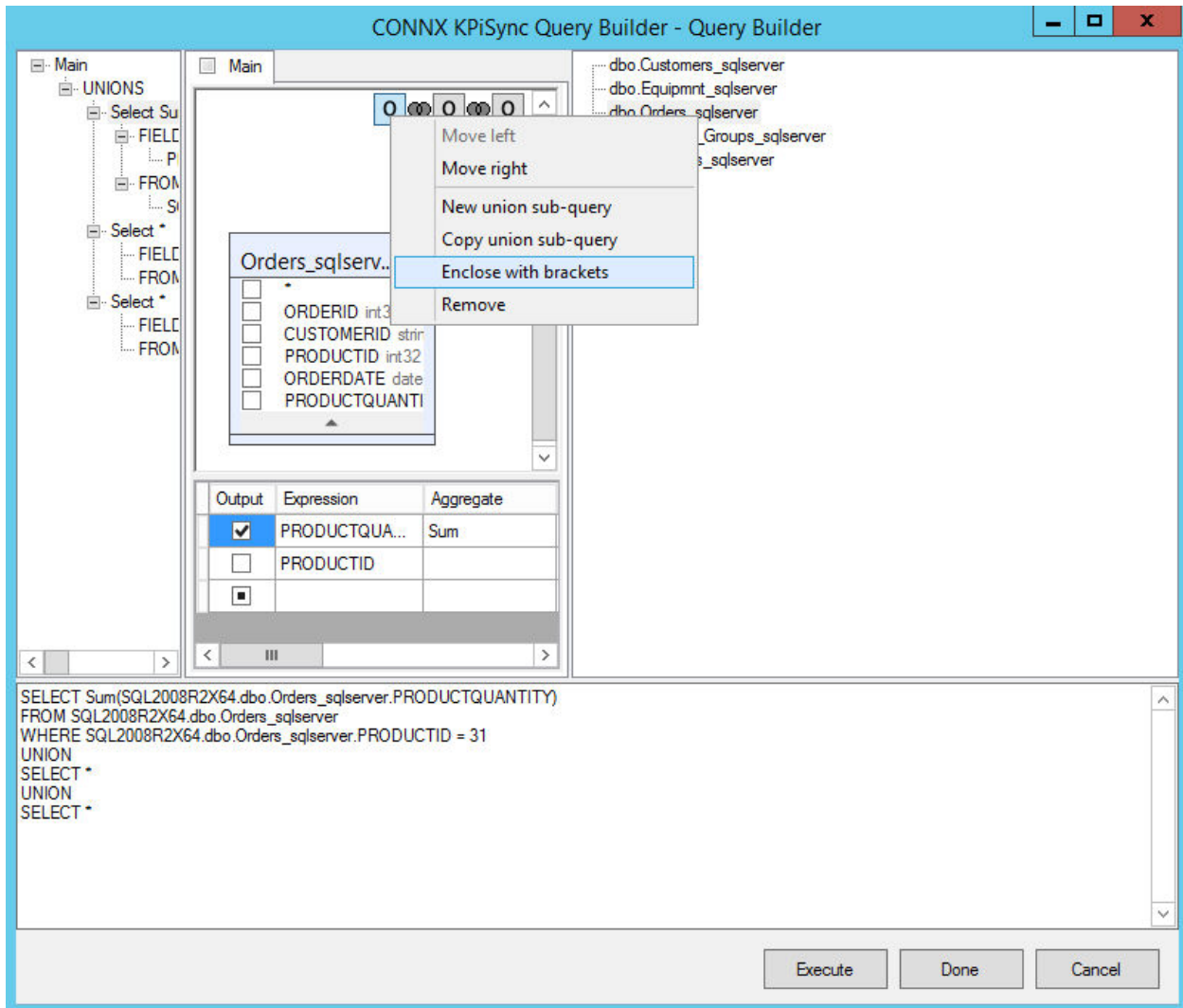
To move the sub-query or bracket to the bottom of the query, right-click the **Q** and select **Move Right**.

To remove the sub-query, right-click the **Q** and select **Remove**.

Union sub-query bracket operations

To enclose the sub-query in brackets right-click the **Q** and select **Enclose with brackets**.

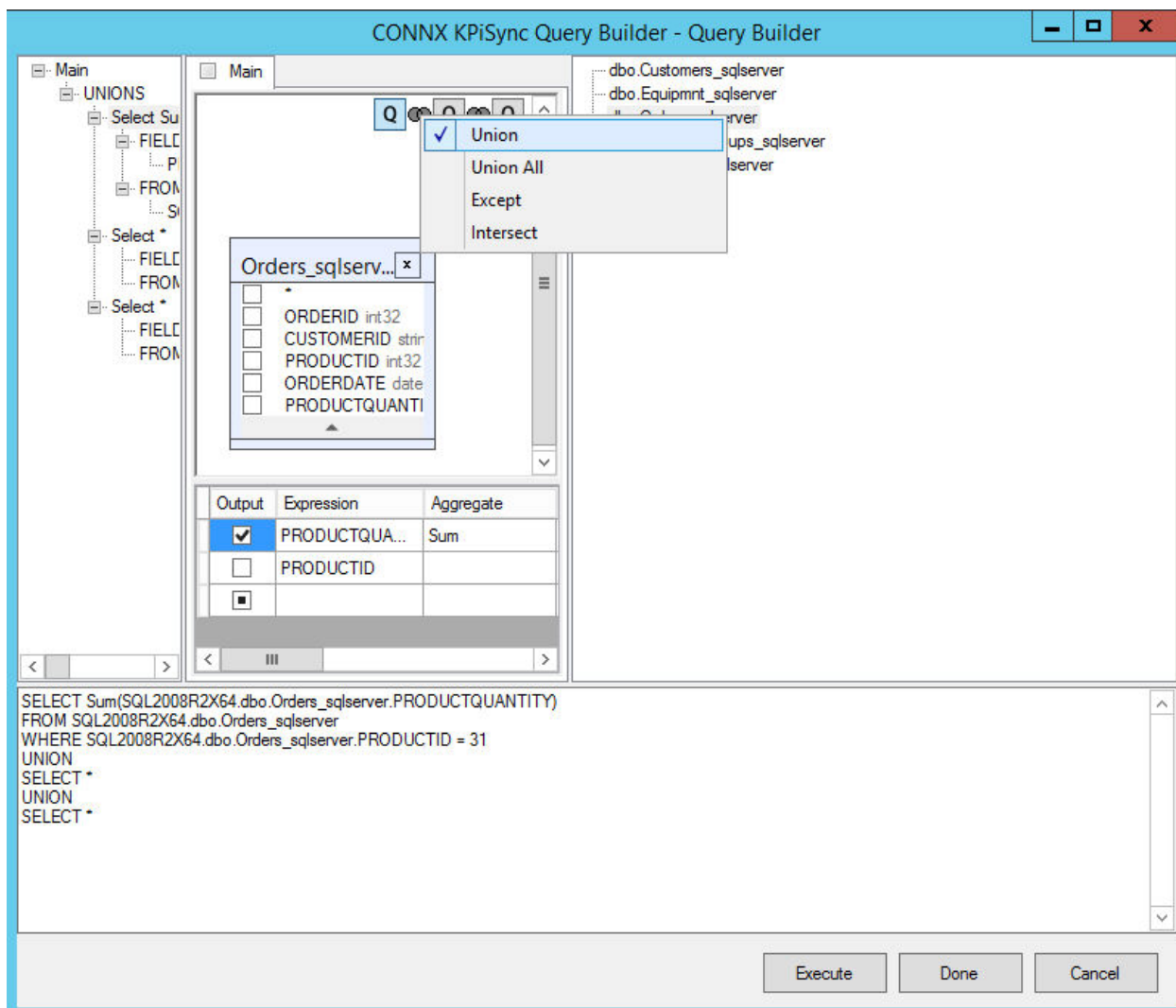
To remove the brackets from a sub-query, right click on the query bracket and select **Remove brackets**.



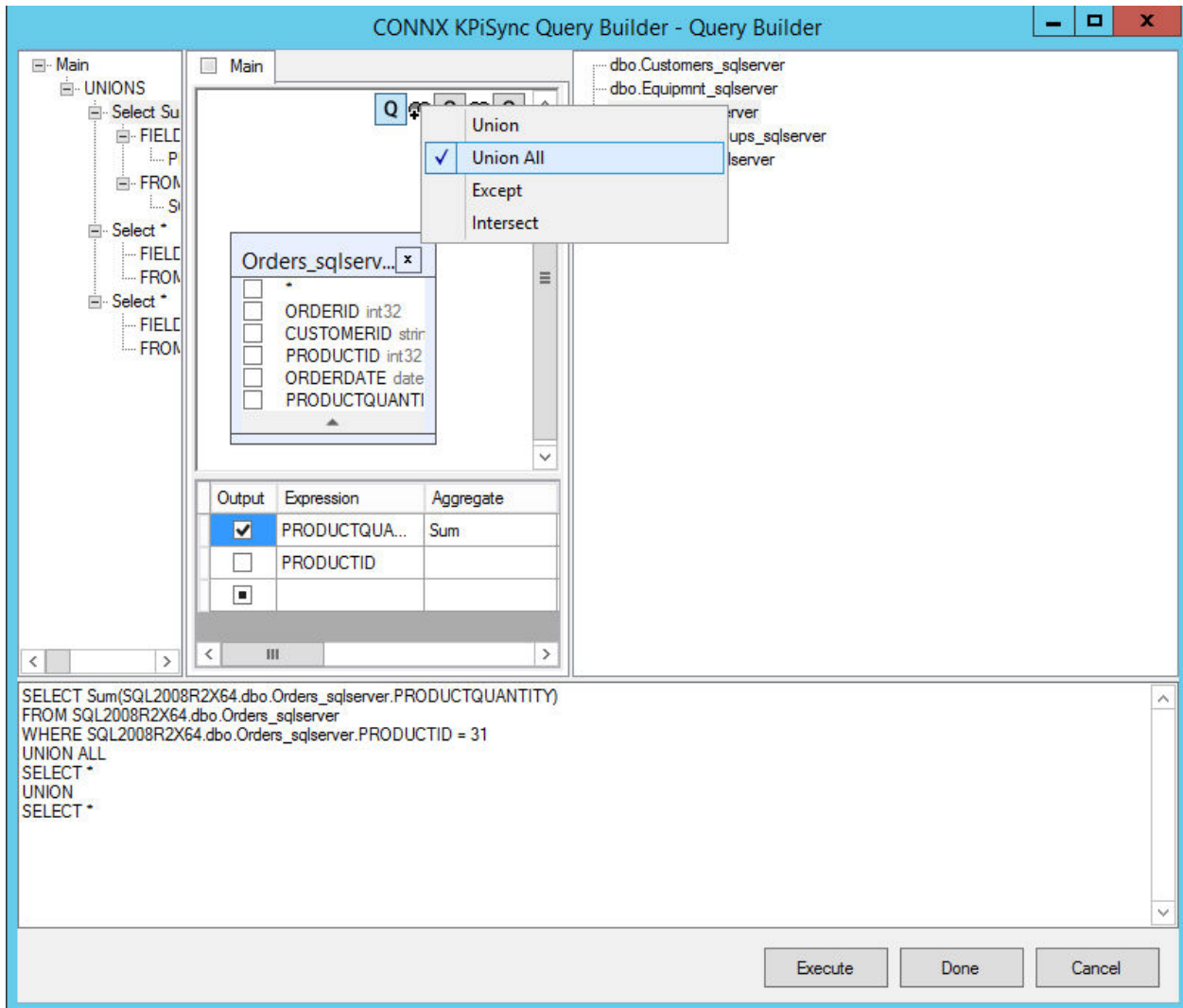
Union operations

To change a union operand, right-click on the union button uniting the two queries you want to modify.

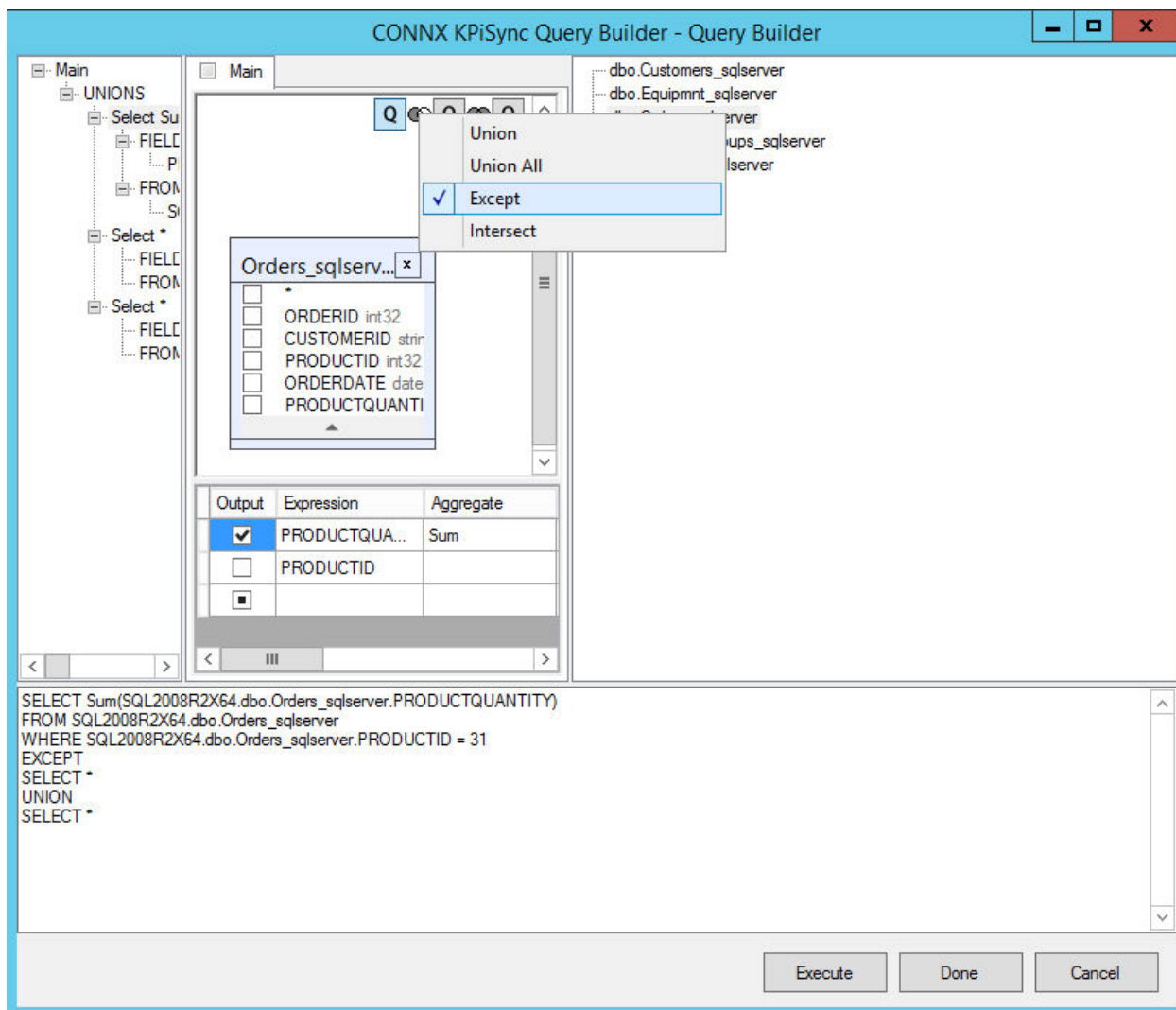




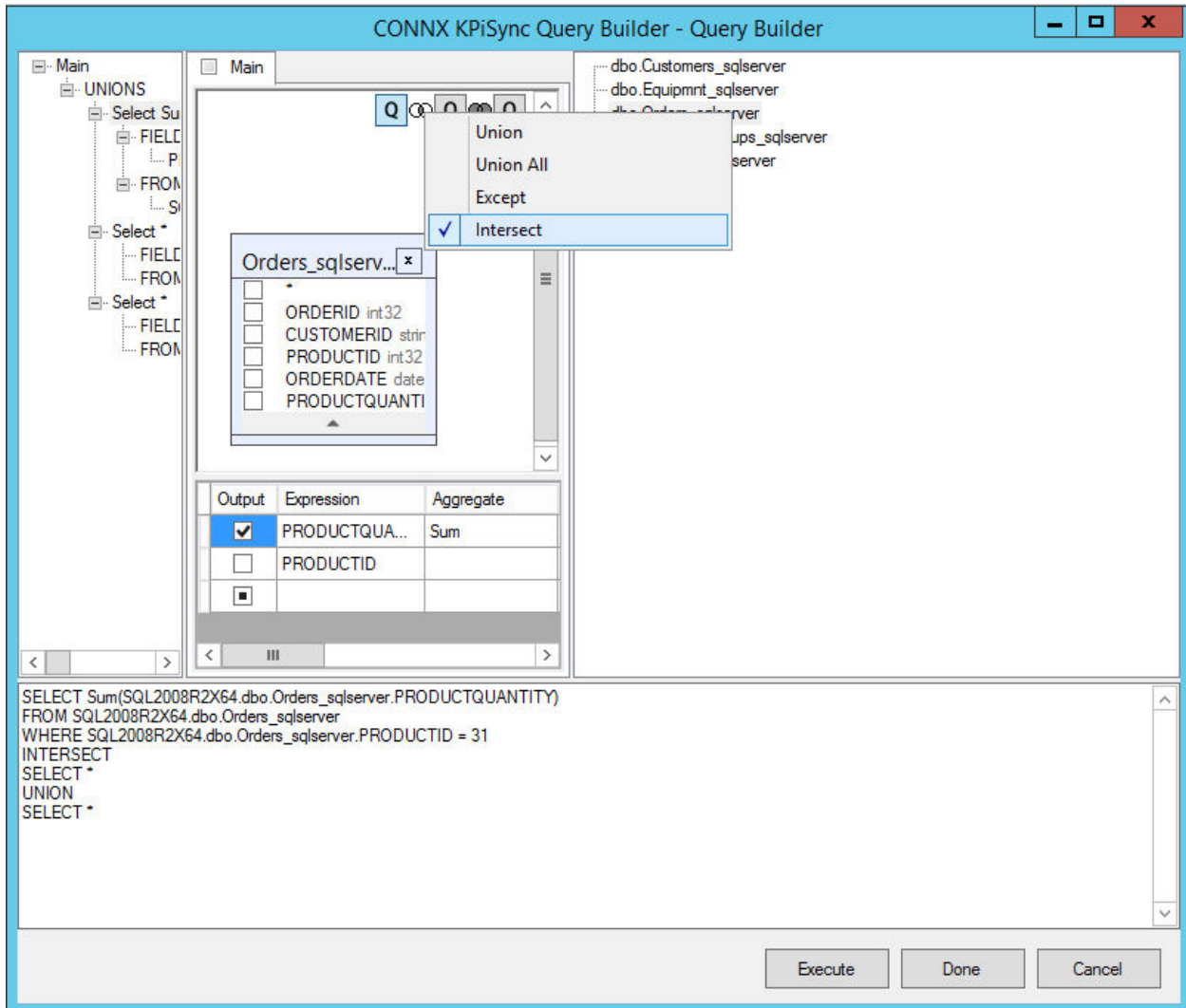
Right-click on **Union All** to change the selected Union operand to Union All.



Right-click on **Except** to change the selected Union operand to Except.

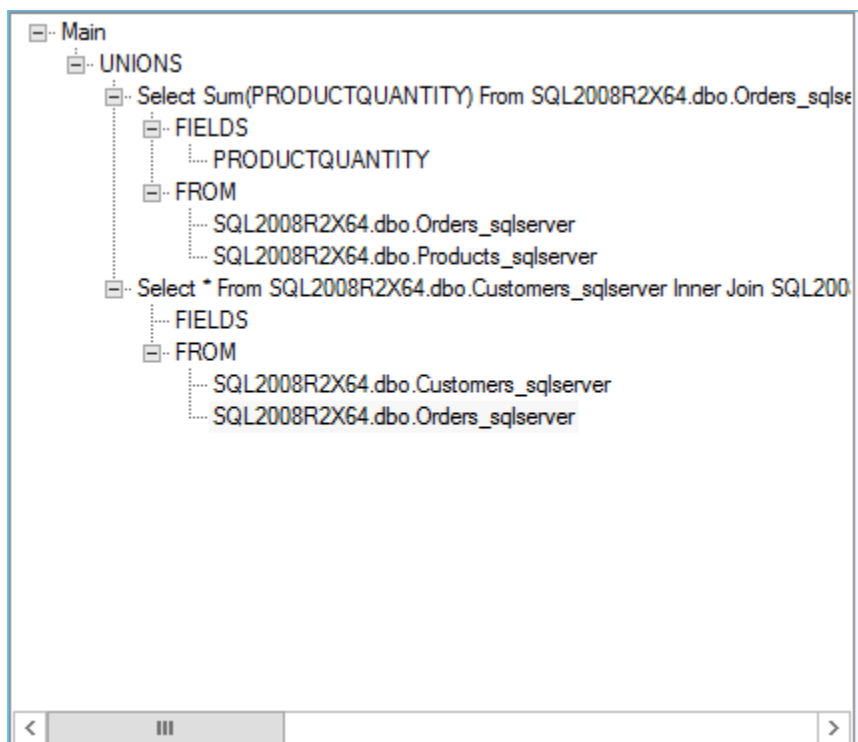


Right-click on **Intersect** to change the selected Union operand to Intersect.



Navigating the query tree

The Query Tree Pane allows you to browse the compact tree-like representation of the entire query. This is useful if the query is complex.

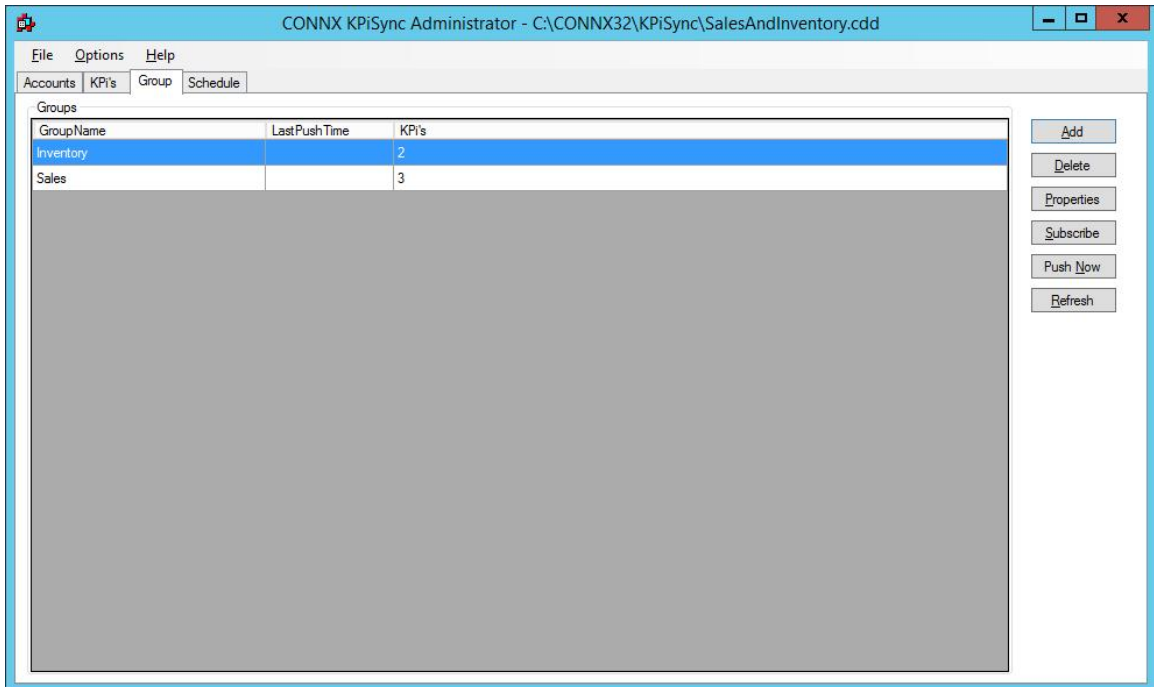


You can expand or contract the query tree. When you click on any entry, the Query Builder displays that part of the query.

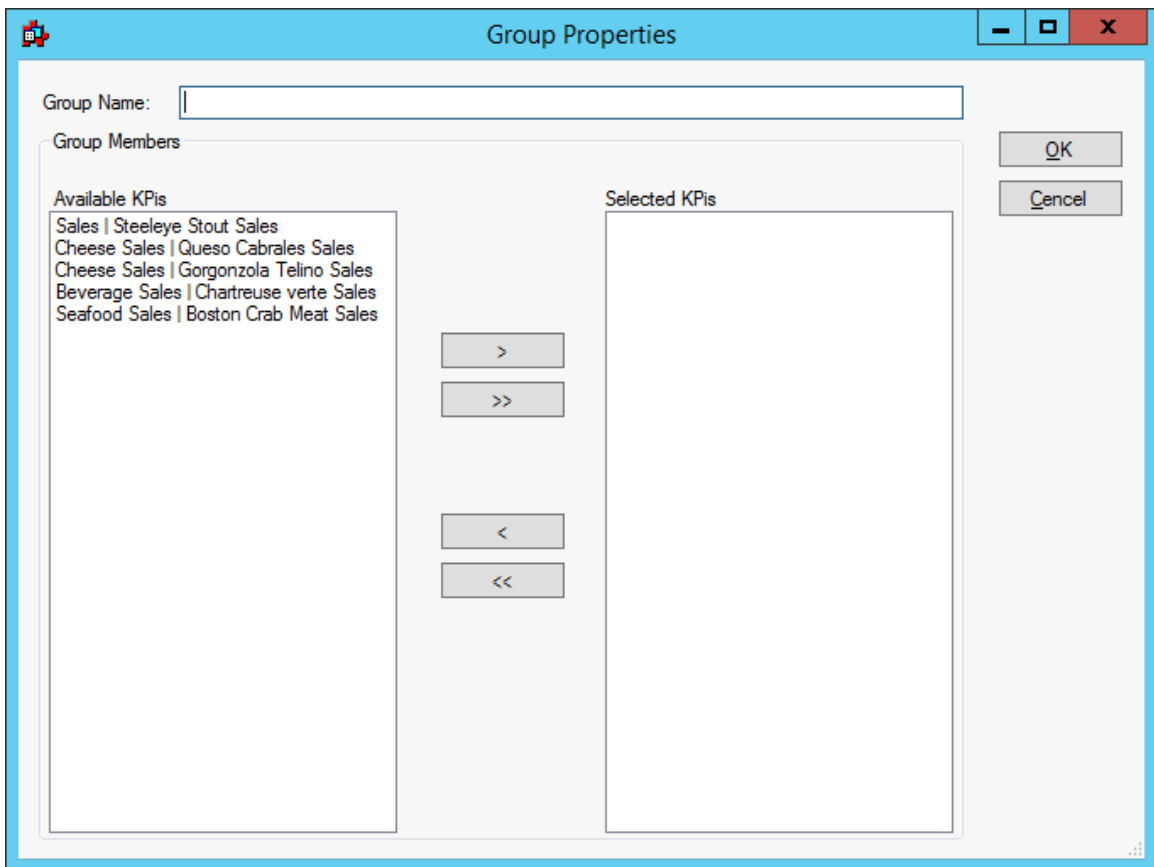
Groups Tab

To place multiple KPIs into a single group

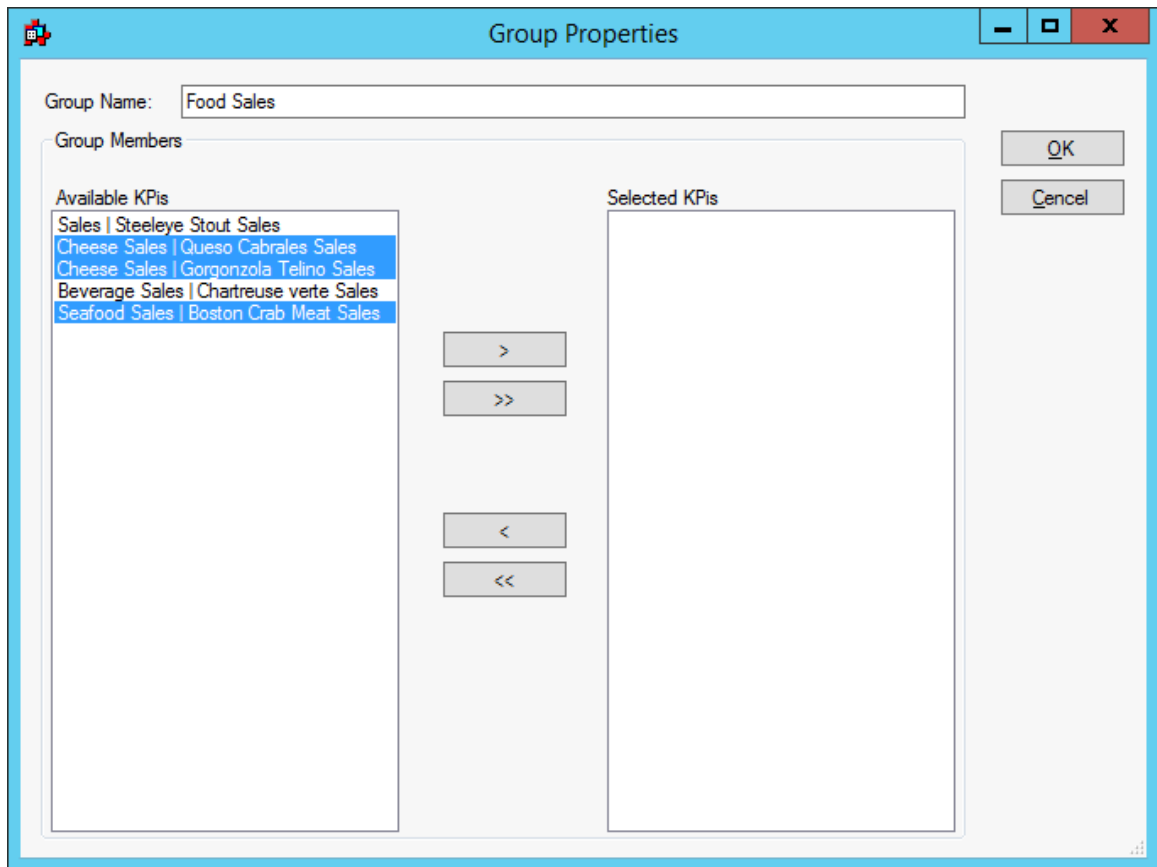
1. Select the **Groups** tab in the CONNX KPiSync Administrator tool window.



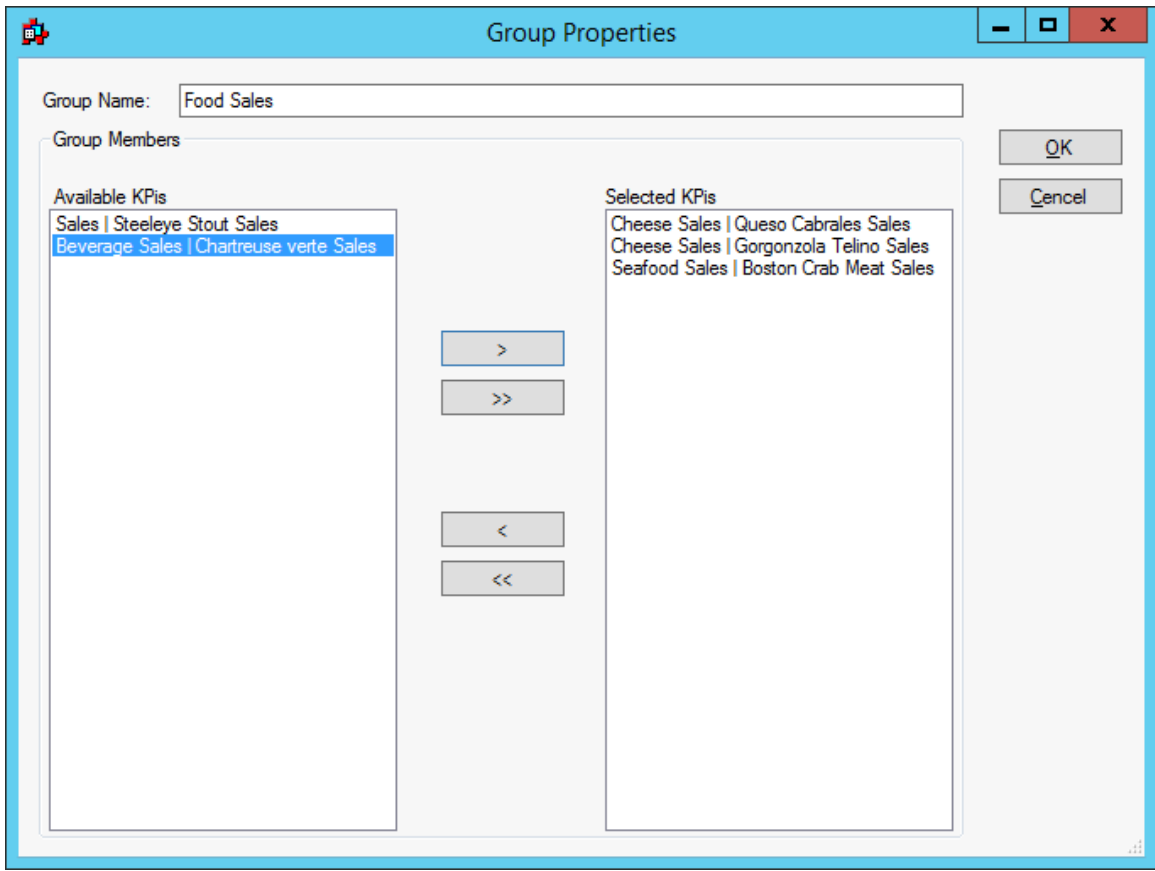
2. Click the **Add** button to create a new group.
3. The **Group Properties** dialog box appears.



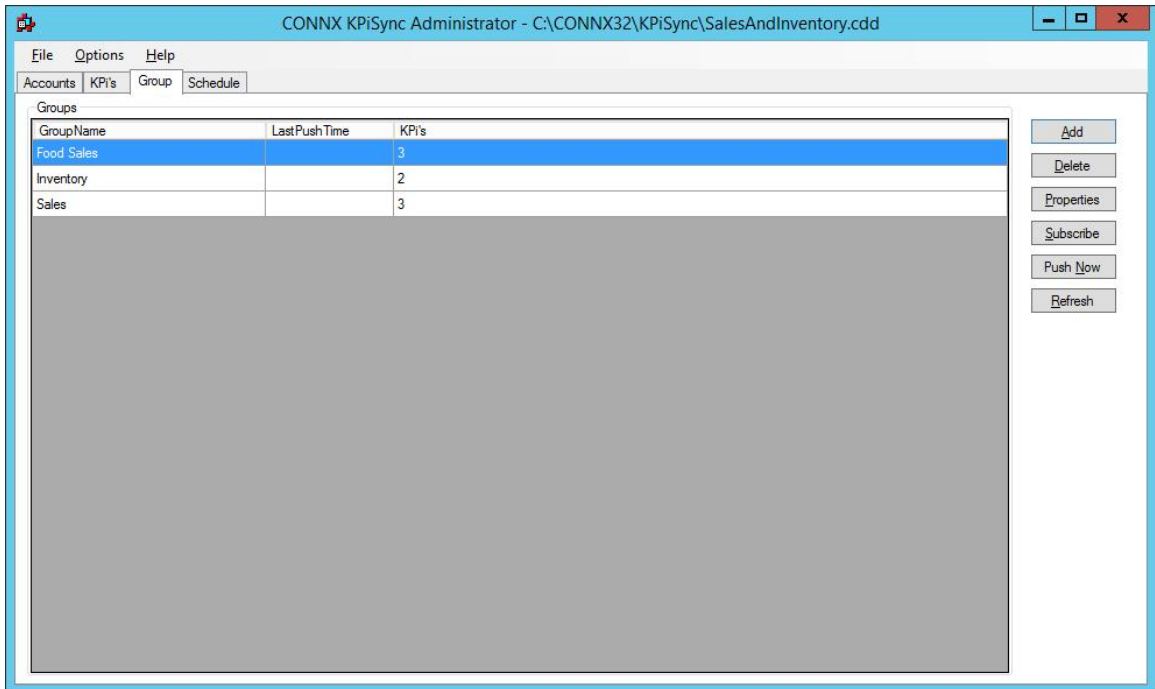
4. Enter a name for the new group, and then select the performance indicators to be included in the group.



5. Click the single arrow button that points to the right to move the selected tables.



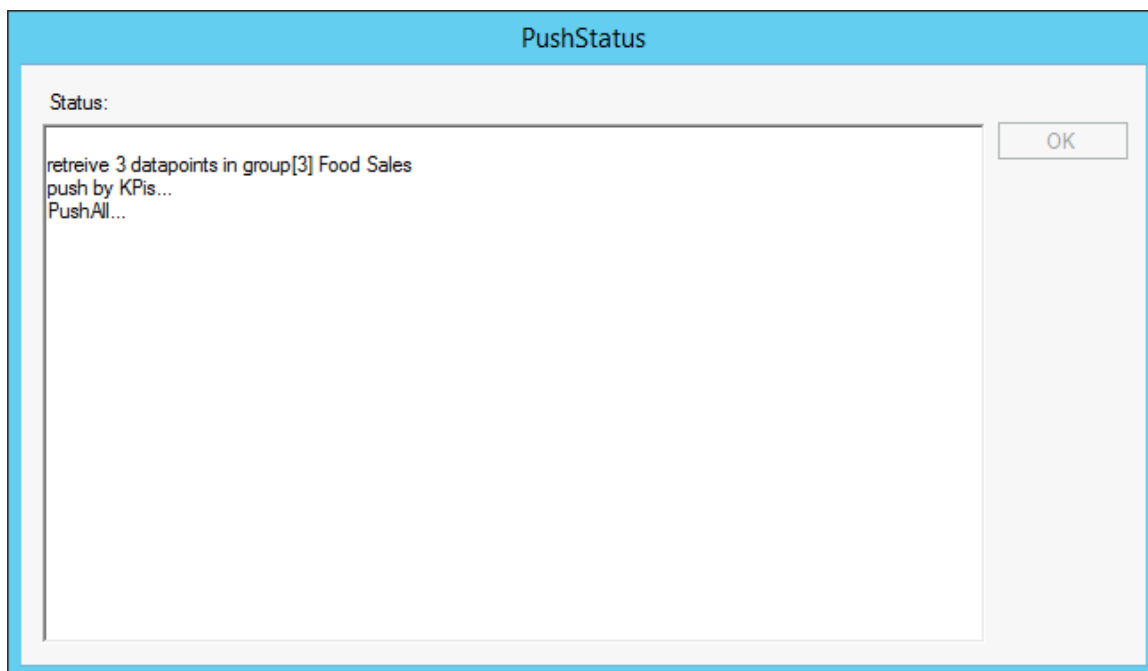
- Click the **OK** button to create the group.



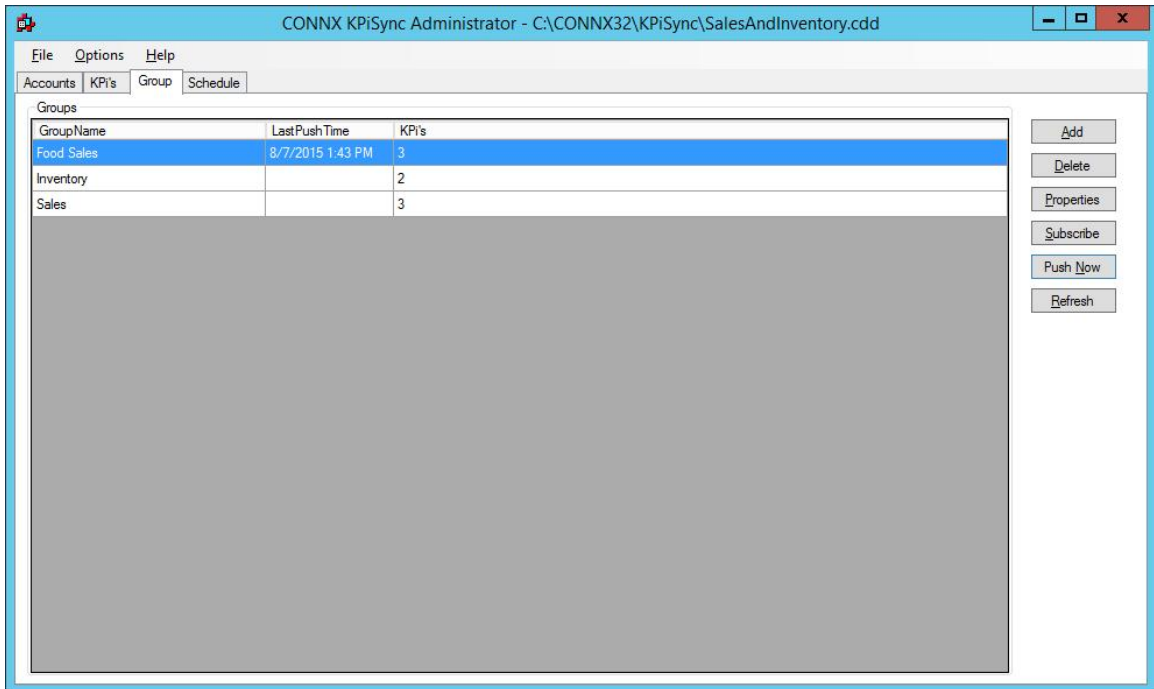
7. To change the properties of the group, to add or remove data points from the group, select a group and click the **Properties** button.
8. The **Group Properties** dialog box appears.
9. Select the desired changes, and then click the **OK** button.

To push a group on demand

1. Click the **Push Now** button to start the performance indicator push process.
2. The **Push Status** screen appears.



3. Information regarding the push of the performance indicators will be listed in this status screen. Any errors during the performance indicator push process will also be displayed here.
4. Once the performance indicator push is complete the Group tab will display the last push time for that group.

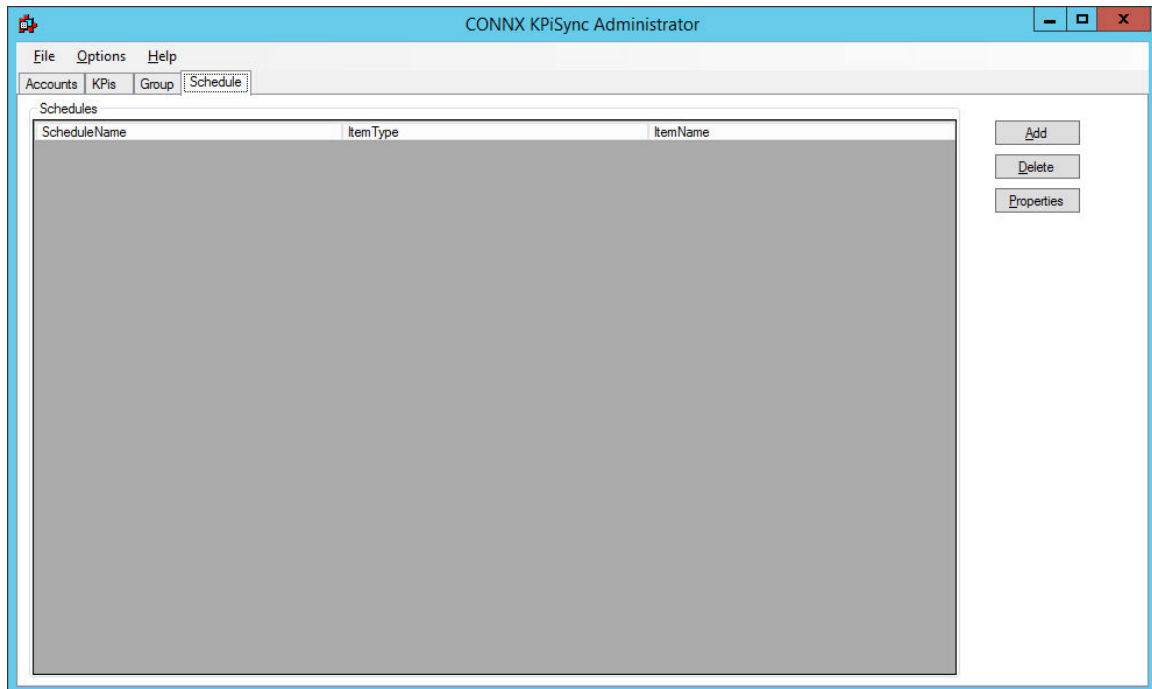


5. If you wish to perform this group push on a regular basis, you can create a schedule. To create a schedule, click the **Schedule** tab to establish the timing of the push. See [To schedule a push task](#) for more information.
6. If you wish to specify which users will get updates for the KPi's associated with this group, please see the chapter on [Subscribing Users](#).

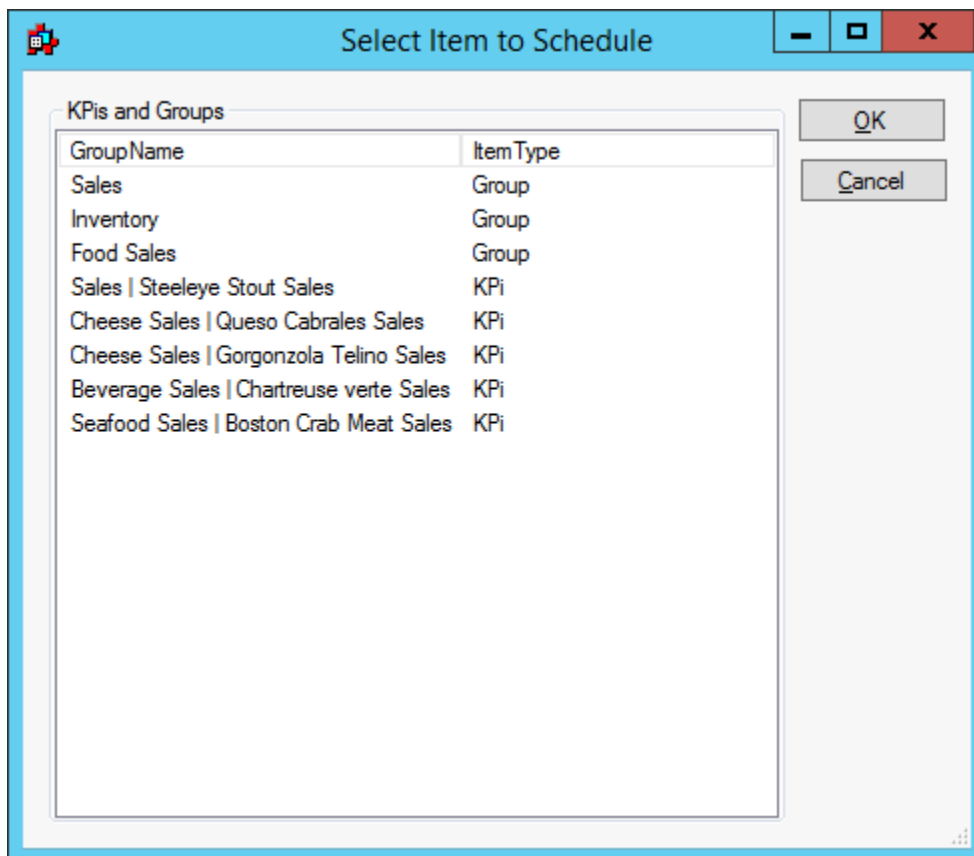
Schedule Tab

To schedule a Key Performance Indicator Push task

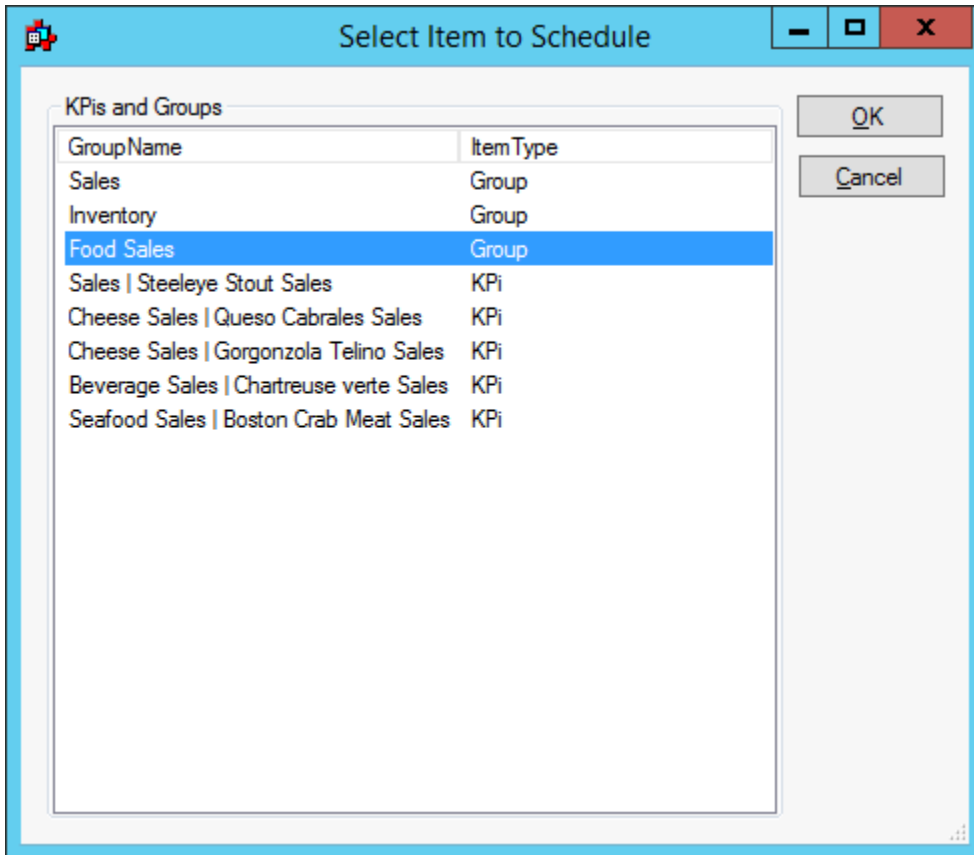
1. Select the **Schedule** tab in the CONNX KPiSync Administrator tool window.



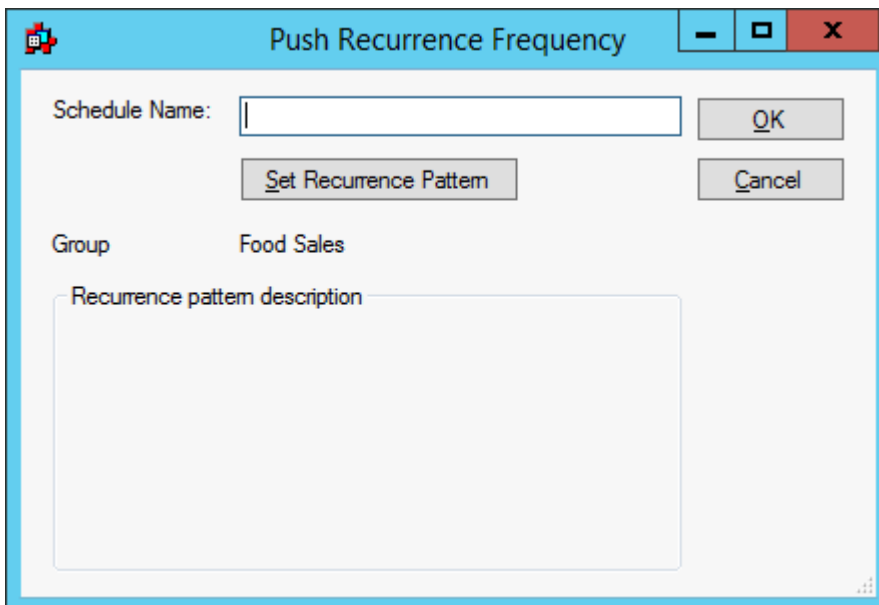
2. Click the **Add** button to create a new scheduling task.
3. The **Select Item to Schedule** dialog box appears.



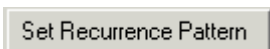
4. Select the KPIs or groups to be included in the scheduling task.



5. Click the **OK** button.
6. The **Push Recurrence Frequency** dialog box appears.



- Enter a name for the schedule in the **Schedule Name** text box, and then click the **Set Recurrence Pattern** button.



- The **Date and Time Selection** dialog box appears.

 A screenshot of the "Date and Time Selection" dialog box. The dialog has a blue title bar with a question mark and a close button (X). It is divided into three main sections:

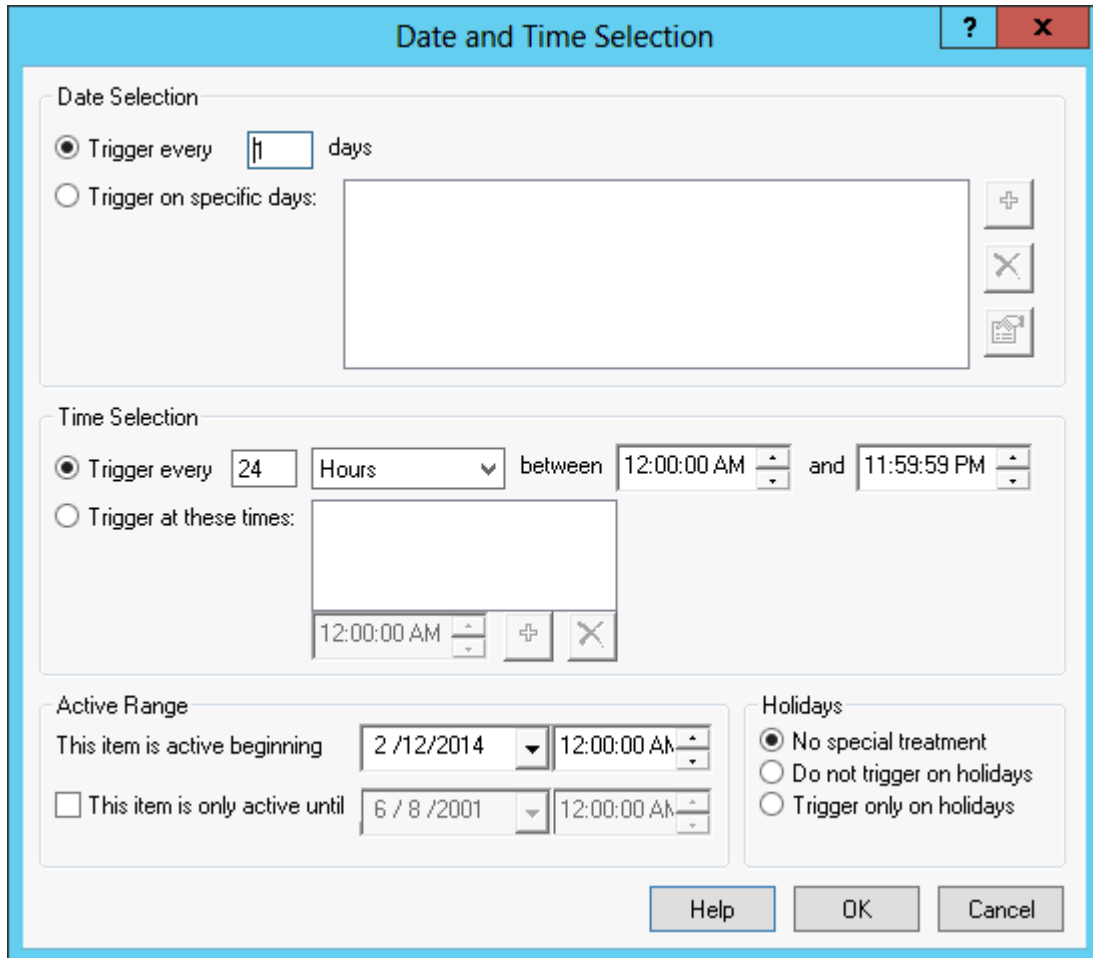
- Date Selection:** Contains two radio buttons. The first is "Trigger every" followed by a text box containing "1" and the word "days". The second is "Trigger on specific days:" followed by a large empty text area and three small icons (plus, minus, and a calendar icon).
- Time Selection:** Contains two radio buttons. The first is "Trigger every" followed by a text box containing "24", a dropdown menu set to "Hours", and the word "between". This is followed by two time pickers: "12:00:00 AM" and "11:59:59 PM". The second radio button is "Trigger at these times:" followed by an empty text area and two time pickers: "12:00:00 AM" and a plus/minus icon.
- Active Range:** Contains two rows. The first row has a checked checkbox, "This item is active beginning", a date picker set to "2 / 12 / 2014", and a time picker set to "12:00:00 AM". The second row has an unchecked checkbox, "This item is only active until", a date picker set to "6 / 8 / 2001", and a time picker set to "12:00:00 AM".
- Holidays:** Contains three radio buttons: "No special treatment" (checked), "Do not trigger on holidays", and "Trigger only on holidays".

 At the bottom right, there are three buttons: "Help", "OK", and "Cancel".

- The options available in this dialog box enable you to set a performance indicator push schedule that can occur on a specific day, or at a specific minute or hour. You can also establish a specific range of days or hours in which the push is active, and then specify the day and time at which the push ceases.
- Click the **OK** button to return to the **Push Recurrence Frequency** dialog box. Click the **OK** button. If the CONNXMobileSchedule service has not been started, a dialog box appears asking if you would like to start the service. Click the **Yes** button.
- If the service has been started once, then stopped, a dialog box appears asking if you would like to restart. Click the **Yes** button.
- The **Push Recurrence Frequency** dialog box appears. Click the **OK** button to continue.

To select a Key Performance Indicator Push date

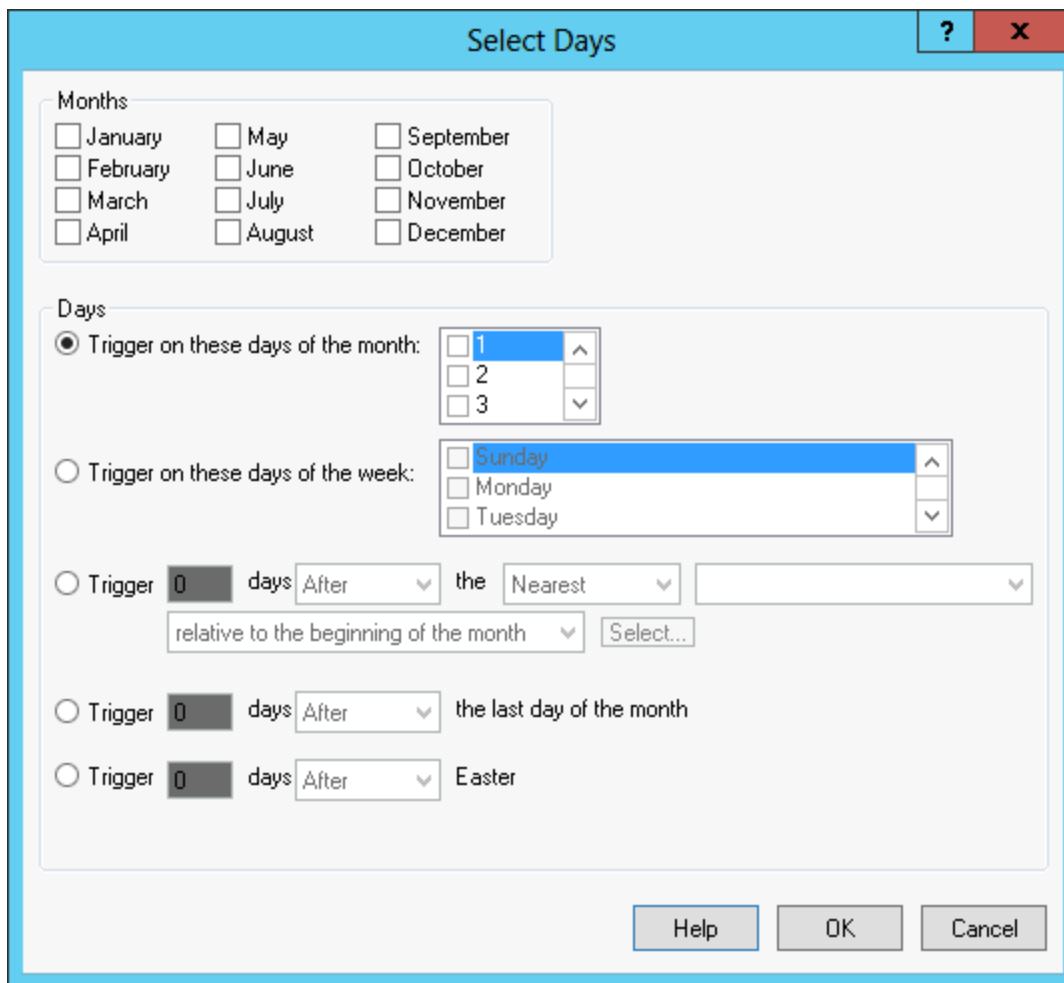
1. In the **Date and Time Selection** dialog box, under **Date Selection**, click the **Trigger every** ___ **days** radio button, and then enter a number in the text box.



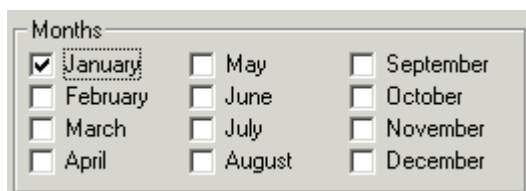
2. If you want to change the trigger date, click the **Trigger on specific days** radio button, and then click the **Plus** sign button.



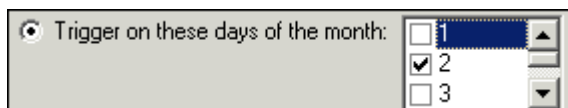
3. The **Select Days** dialog box appears.



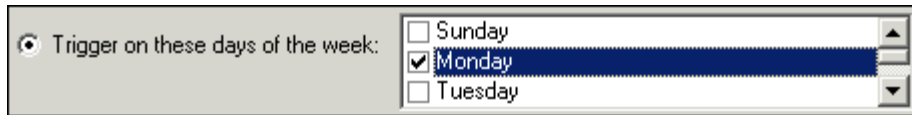
- Under **Months**, select a month check box. You may select more than one month.



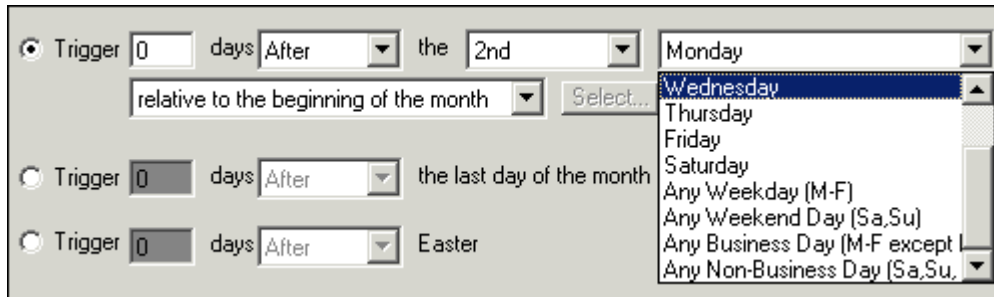
- Under **Days**, there is a range of daily triggers to choose from. If you select **Trigger on these days of the month**, you must click the radio button, then click the check boxes for the days. You can choose one or more days.



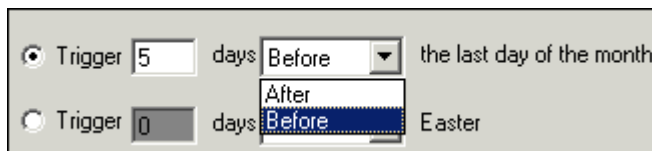
- If you select **Trigger on these days of the week**, you must click the radio button, then click the check boxes for the days of the week. You can choose one or more days of the week.



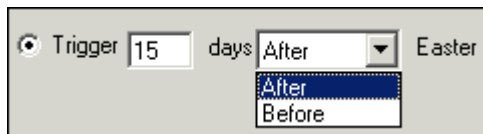
- If you select **Trigger ___ days ___ the _____**, you must click the radio button, then choose items from the list boxes.



- If you select **Trigger ___ days ___ the last day of the month**, you must click the radio button, enter a day, then choose either **After** or **Before** from the list box.



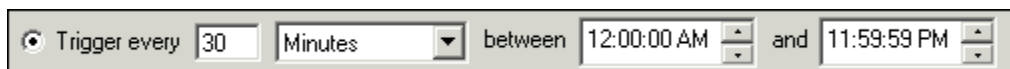
- If you select **Trigger ___ days ___ Easter**, you must click the radio button, enter a day, then choose either **After** or **Before** from the list box.



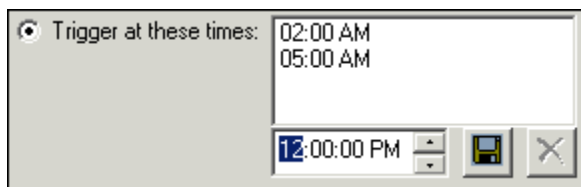
- Click the **OK** button to return to the **Date and Time Selection** dialog box.

To select a Key Performance Indicator Push time

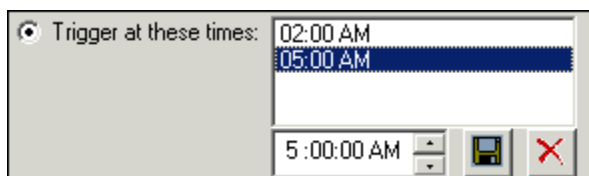
- In the **Date and Time Selection** dialog box, under **Time Selection**, click the **Trigger every ___ between ___ and ___** radio button, and then enter a number in the first text box. Select either **Minutes** or **Hours** from the first list box, then select the hour from the two clocks during which you want the synchronization task to run.



- If the scheduling requirement is irregular, you may use the second option. Select the radio button, and then select the hours you need from the list box. When you have completed your scheduling input, click the **Save** icon.



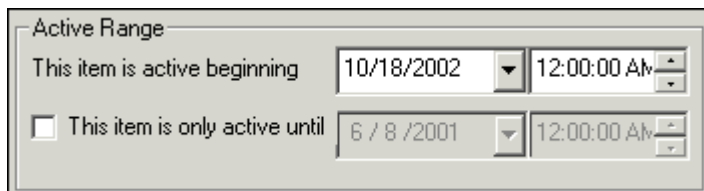
3. To remove any of the information from this schedule, select the time you want to remove, then click the **Delete** button. To return to adding more scheduling time, click the **Plus** button.



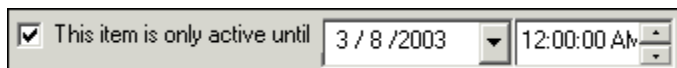
4. Click the **OK** button to return to the **Push Recurrence Frequency** dialog box.

To select an active range

1. In the **Date and Time Selection** dialog box, under **Active Range**, select a date from the **This item is active beginning** text box, and then select a time from the list box.



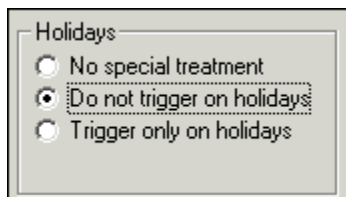
2. To establish an end date for a synchronization task, select the **This item is only active until** check box.



3. Click the **OK** button to return to the **Push Recurrence Frequency** dialog box.

To establish holiday scheduling

1. In the **Date and Time Selection** dialog box, under **Holidays**, select from the choices by clicking either the **No special treatment**, **Do not trigger on holidays**, or **Trigger only on holidays** radio button.



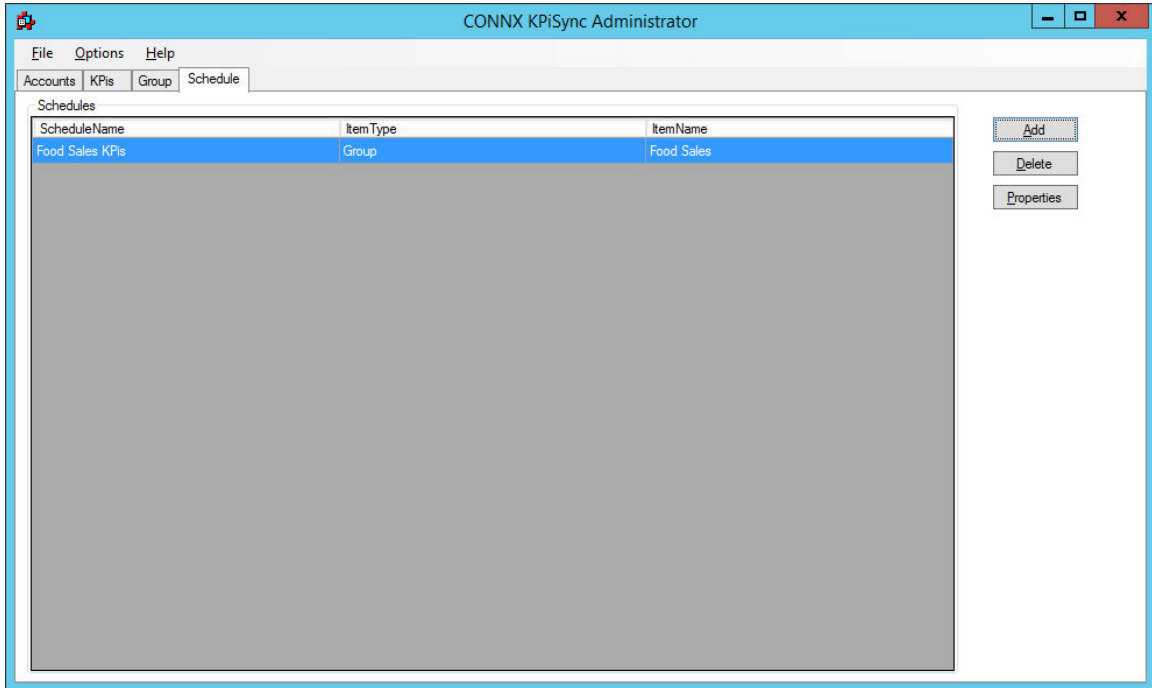
The CONNX Data Synchronization Tool is currently programmed to include New Years Day (January 1), Memorial Day (May 30), Independence Day (July 4), Thanksgiving Day (fourth Thursday in November), Labor Day (first Monday in September), and Christmas (December 25)

in its holiday schedule.

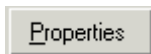
2. Click the **OK** button to return to the **Push Recurrence Frequency** dialog box.

To view scheduling properties

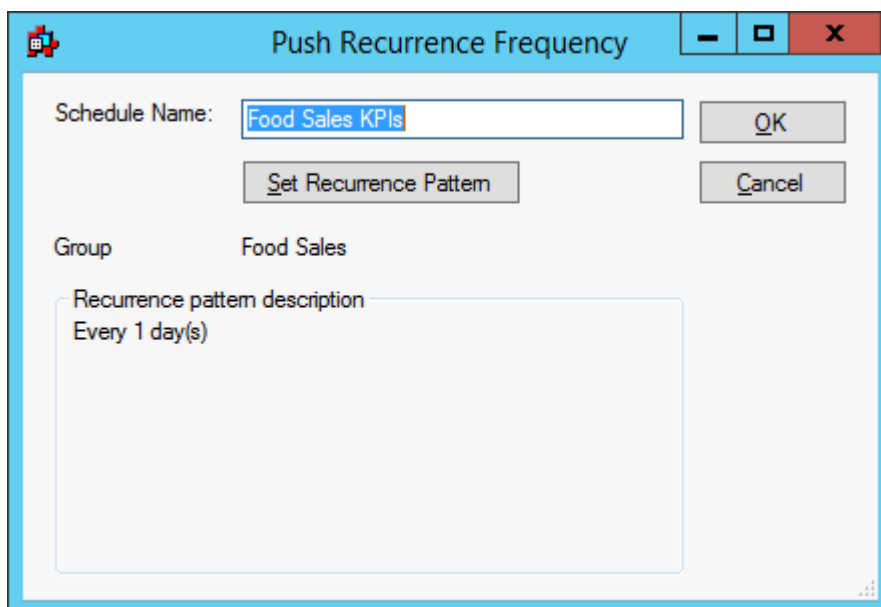
1. On the **Schedule** tab, under **Schedules**, select a **Schedule**.



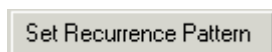
2. Click the **Properties** button.



3. The **Push Recurrence Frequency** dialog box appears.



4. Click the **Set Recurrence Pattern** button.



5. The **Date and Time Selection** dialog box appears. Check or change the properties of the synchronization triggers.

Subscribing Users

User Subscriptions

Once User Accounts, KPI's and/or Groups have been created, users need to be subscribed to individual KPI's or groups of KPI's. Users will only receive data for KPI's or Groups to which they are subscribed.

Subscriptions allow you to control which users see which Key Performance Indicators. For example, you may wish to group all sales related KPI's into a single group named Sales. You can then set up subscriptions for every member of the sales force to receive those KPI's.

Subscriptions may be managed from three different perspectives:

1. From the Accounts Tab, you can view, add or remove subscriptions to individual KPI's or Groups on a per user basis. Please see the [Subscription by Account](#) topic in this chapter for more information.
2. From the KPI's Tab, you can view, add or remove subscribed users to individual KPI's. Please see the [Subscription by KPI](#) topic in this chapter for more information.

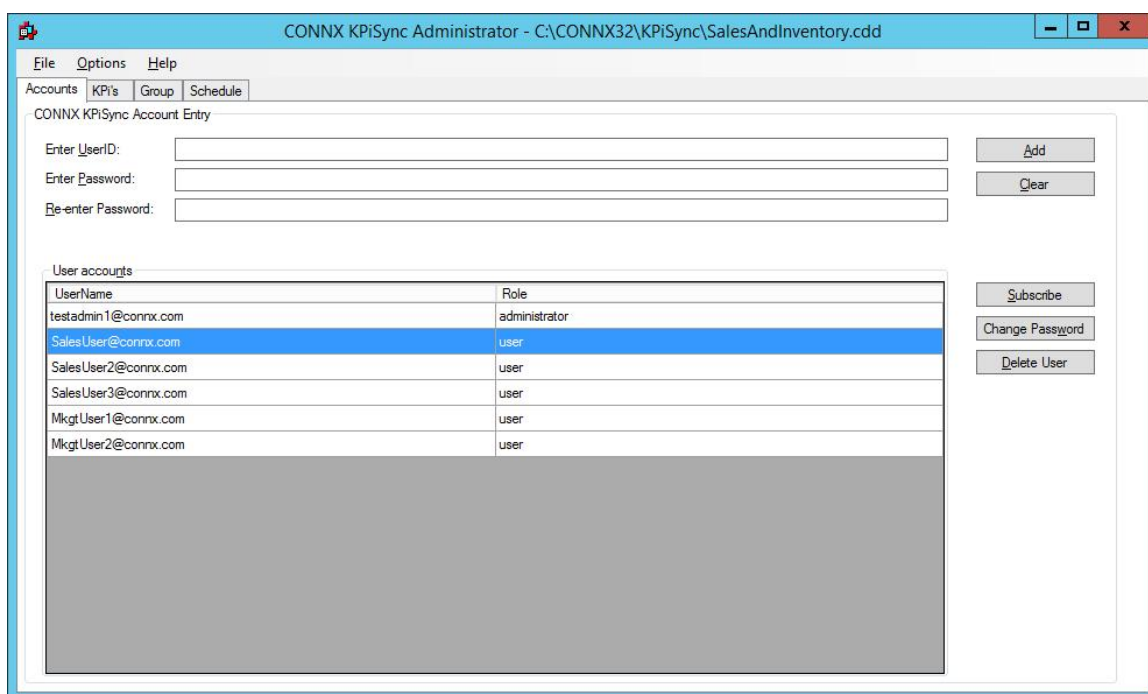
- From the Groups Tab, you can view, add or remove subscribed users to individual Groups. Please see the [Subscription by Group](#) topic in this chapter for more information.

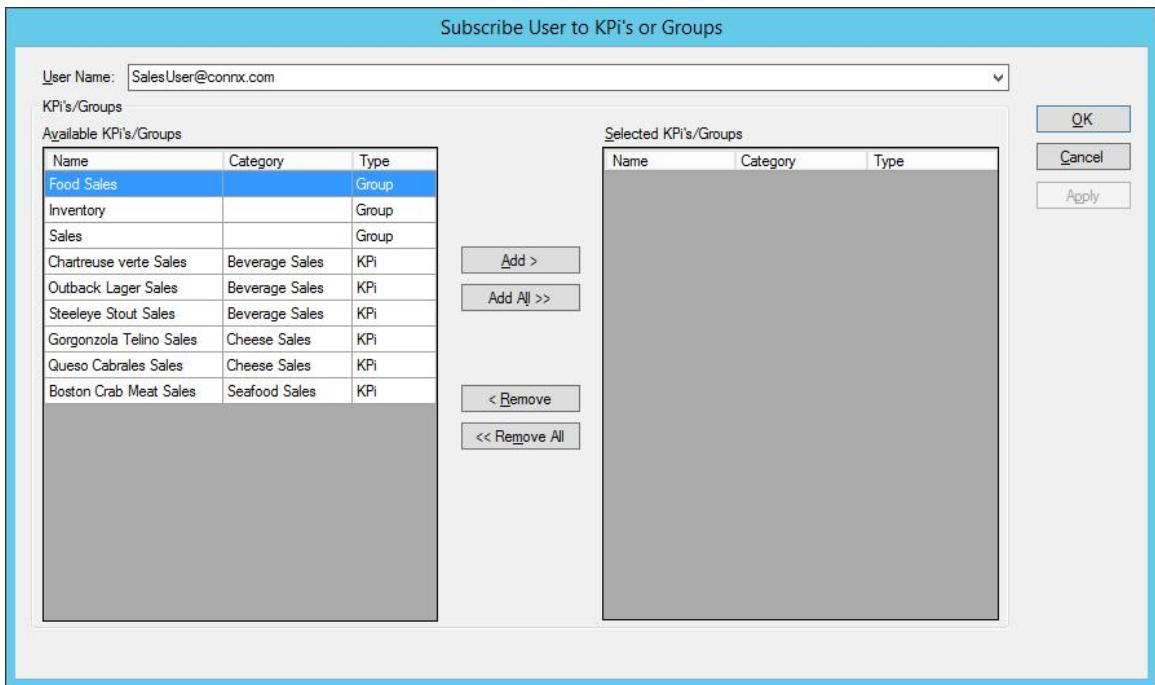
While the needs of each environment will vary, it is recommended that KPI's be added to Groups and then users can be subscribed once to a group rather than creating multiple subscriptions for several KPI's.

Subscription by Account

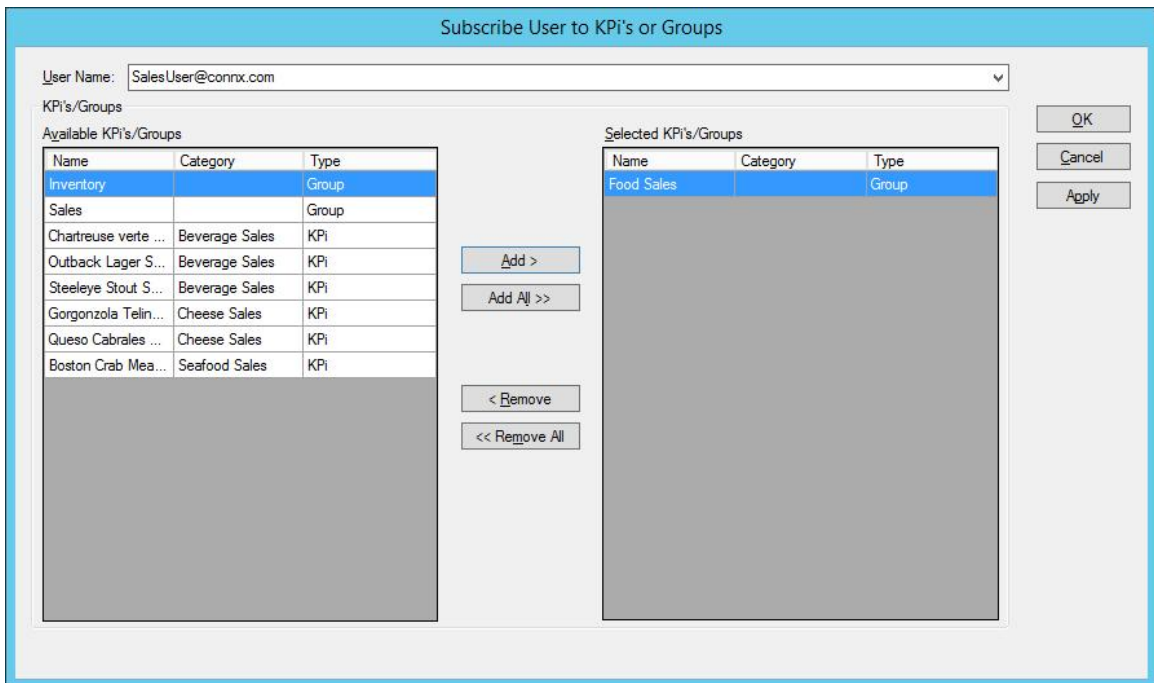
To view, add or remove subscriptions to KPI's and/or Groups on a per user basis:

- On the **Accounts tab**, select the user you wish to work with and click Subscribe button. This will bring up the Subscribe Users to KPI's or Groups dialog.

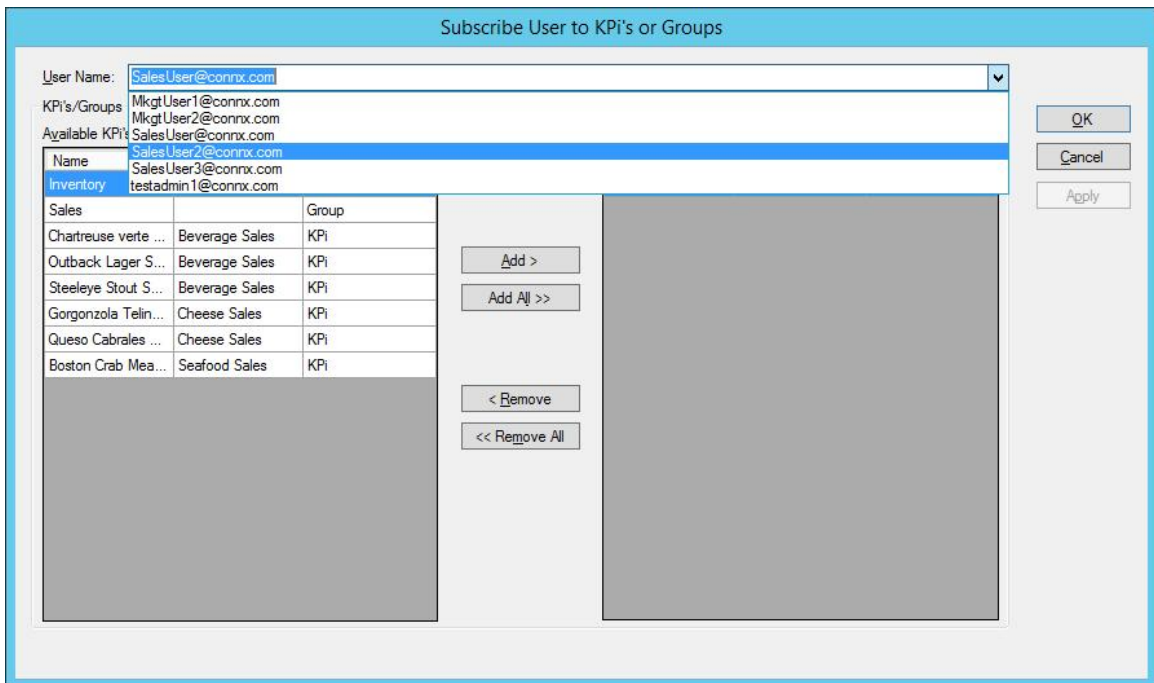




2. This dialog has two lists. The **Available KPI's/Groups** list displays the Groups and KPI's that the user is not yet subscribed to. The **Selected KPI's/Groups** list displays the KPI's and Groups that the user is currently subscribed to. Moving items from the Available list to the Selected list will subscribe the user to those items and moving items from the Selected list to the Available list will removed the subscription. Changes will not be made until either the **Apply** or **OK** buttons are pressed.
3. For this example, we will have SalesUser@connx.com receive updates for all the KPI's in the Food Sales group. Select Food Sales and then click the Add button.



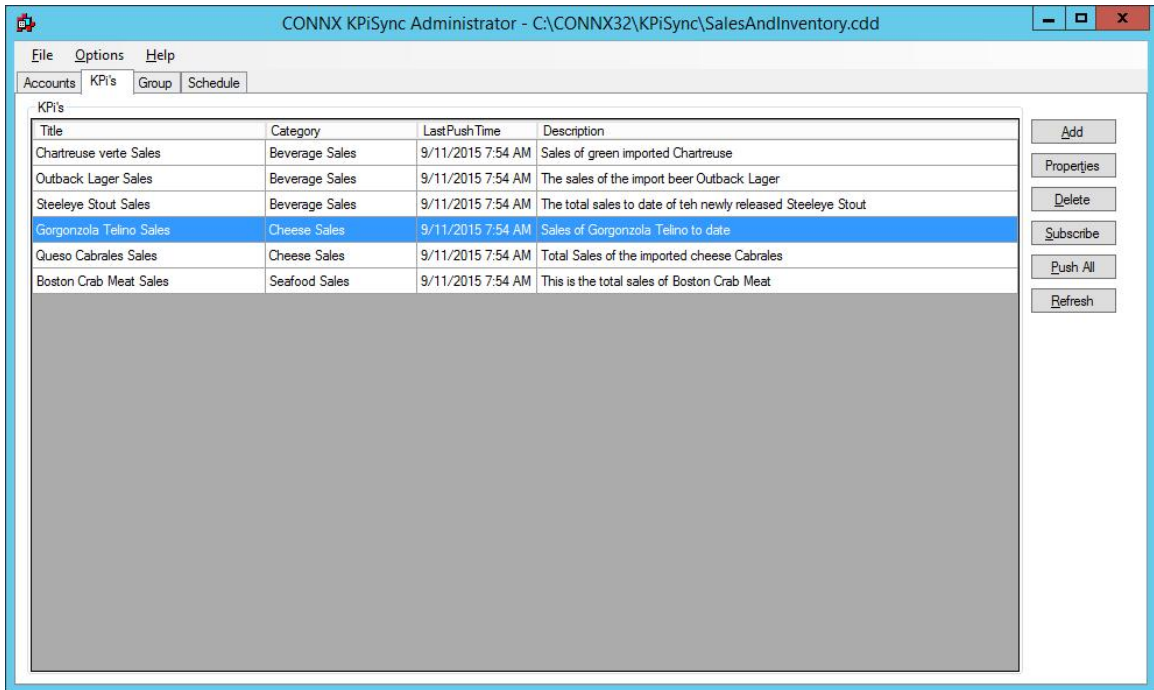
4. Press **OK** to update the KPiSync cloud server with the new subscription information. To work with another user without leaving this dialog, press **Apply** to apply the current changes and then select a new user from the **User Name** pull down.



Subscription by KPi

To view, add or remove subscriptions for a user or a list of users on a per KPi basis:

1. On the **KPi's tab**, select the KPi you wish to work with and click **Subscribe** button. This will bring up the **Subscribe Users to KPi's** dialog.



Subscribe Users to KPi's

KPi Name: Gorgonzola Telino Sales | Cheese Sales

Users

Available Users

- SalesUser@connx.com
- SalesUser2@connx.com
- SalesUser3@connx.com
- MkgUser1@connx.com
- MkgUser2@connx.com

Selected Users

Buttons: Add >, Add All >>, < Remove, << Remove All

Subscribed via Group

UserName	GroupName
SalesUser@connx.com	Food Sales
SalesUser2@connx.com	Food Sales

Buttons: OK, Cancel, Apply

2. This dialog has two sections.

The **Users section** displays two lists. The **Available Users** list displays the users that are not yet subscribed to this KPi. The **Selected Users** list displays the users that are currently subscribed to this KPi. Moving users from the Available list to the Selected list will subscribe the user to the selected KPi and moving users from the Selected list to the Available list will removed the subscription.

The **Subscribed via Group** section is a read-only list that indicates when a user is already receiving this KPi via a group. In our example, SalesUser@connx.com and SalesUser2@connx.com are both subscribed to the *Gorgonzola Telino Sales* KPi via the *Food Sales* group. While you can also subscribe these users individually to this KPi, it is not recommended as you will then have two redundant subscriptions to manage.

Subscribing a user to both an individual KPi as well as a group that contains that KPi will not result in duplicate data being sent to the mobile device the user is logged into. If a user is subscribed to both a KPi as well as a group containing that KPi, unsubscribing them from the group will not unsubscribe them from the individual KPi (and vice versa).

In this case, you would need to unsubscribe them from both if you did not want them to receive updates for a KPi.

Changes will not be made until either the **Apply** or **OK** buttons are pressed.

3. To subscribe SalesUser3@connx.com to this KPi, select that user and press the **Add** button.

The dialog box is titled "Subscribe Users to KPi's". At the top, there is a dropdown menu for "KPi Name" with the value "Gorgonzola Telino Sales | Cheese Sales". Below this, there are two main sections: "Available Users" and "Selected Users".

Available Users:

- SalesUser@connx.com
- SalesUser2@connx.com
- MktgUser1@connx.com (highlighted)
- MktgUser2@connx.com

Selected Users:

- SalesUser3@connx.com

Between the two lists are several buttons: "Add >", "Add All >>", "< Remove", and "<< Remove All".

At the bottom, there is a section titled "Subscribed via Group" containing a table:

UserName	GroupName
SalesUser@connx.com	Food Sales
SalesUser2@connx.com	Food Sales

On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

4. Press **OK** to update the KPiSync cloud server with the new subscription information. To work with another KPi without leaving this dialog, press **Apply** to apply the current changes and then select a new KPi from the **KPi Name** pull down.

Subscribe Users to KPI's

KPI Name:

Users:

Available Us:

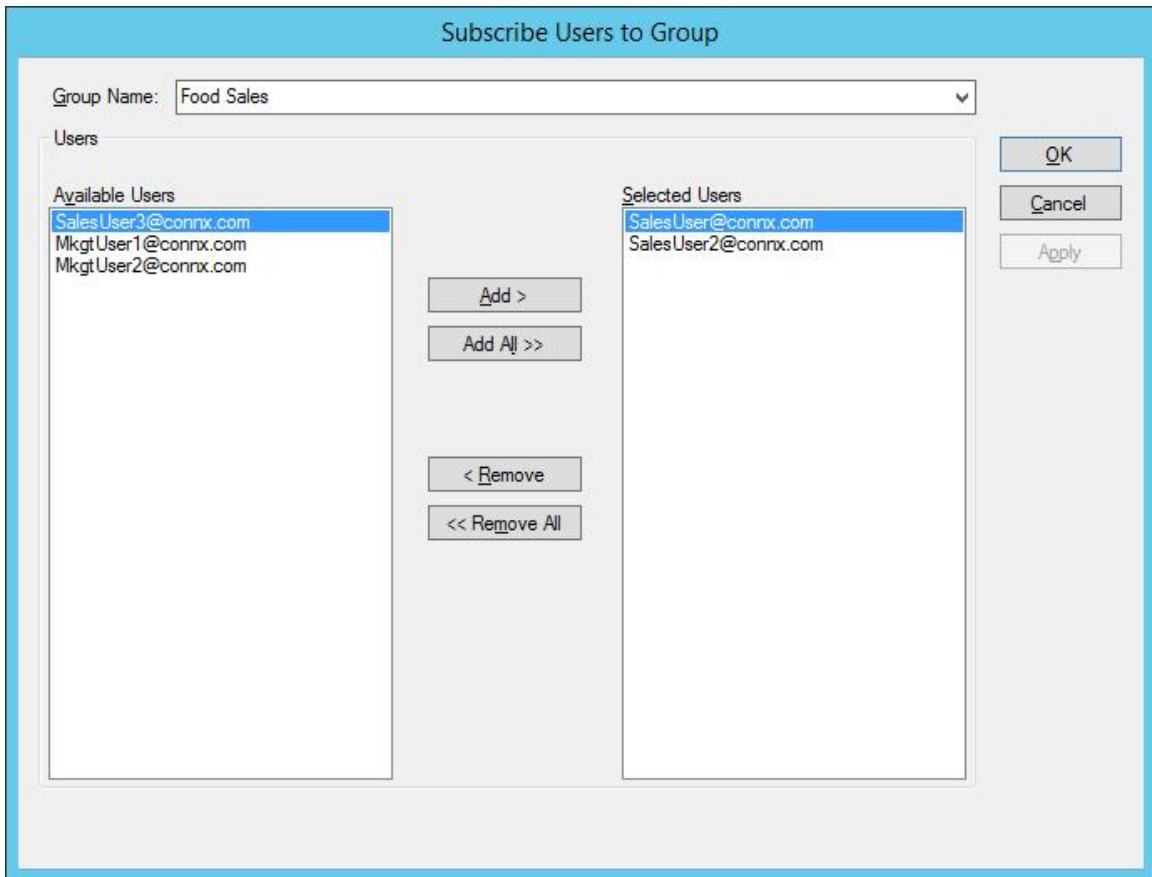
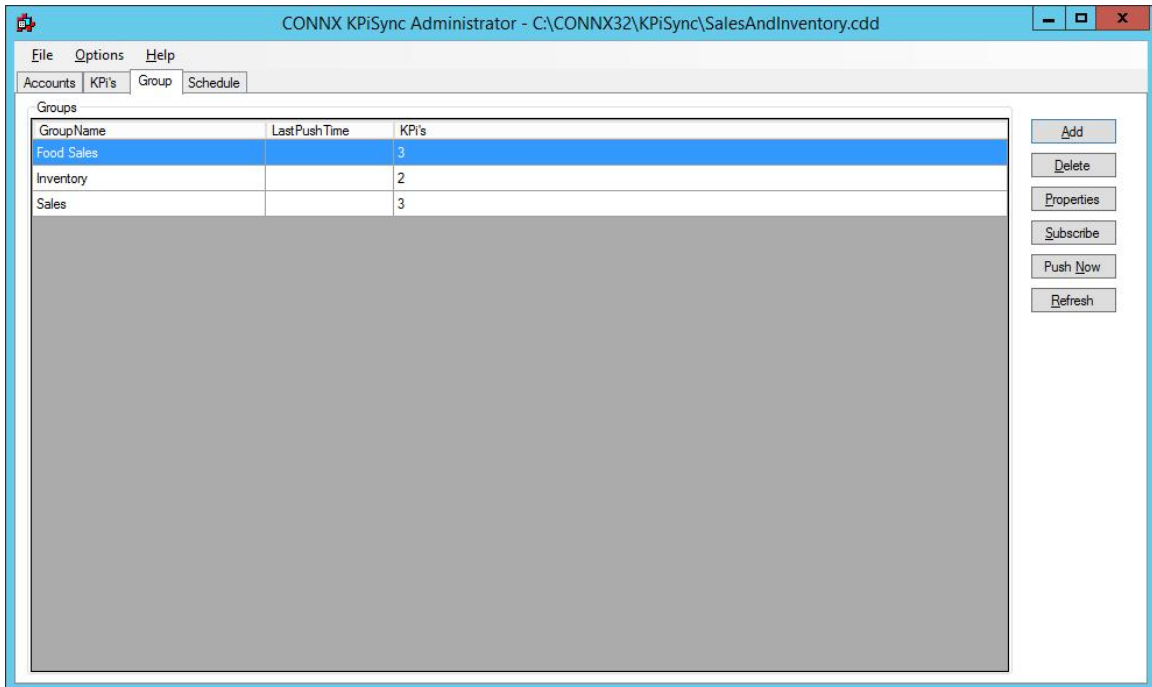
Subscribed via Group

UserName	GroupName
SalesUser@connx.com	Food Sales
SalesUser2@connx.com	Food Sales

Subscription by Group

To view, add or remove subscriptions for a user or a list of users on a per Group basis:

1. On the **Groups tab**, select the Group you wish to work with and click Subscribe button. This will bring up the **Subscribe Users to Groups** dialog.



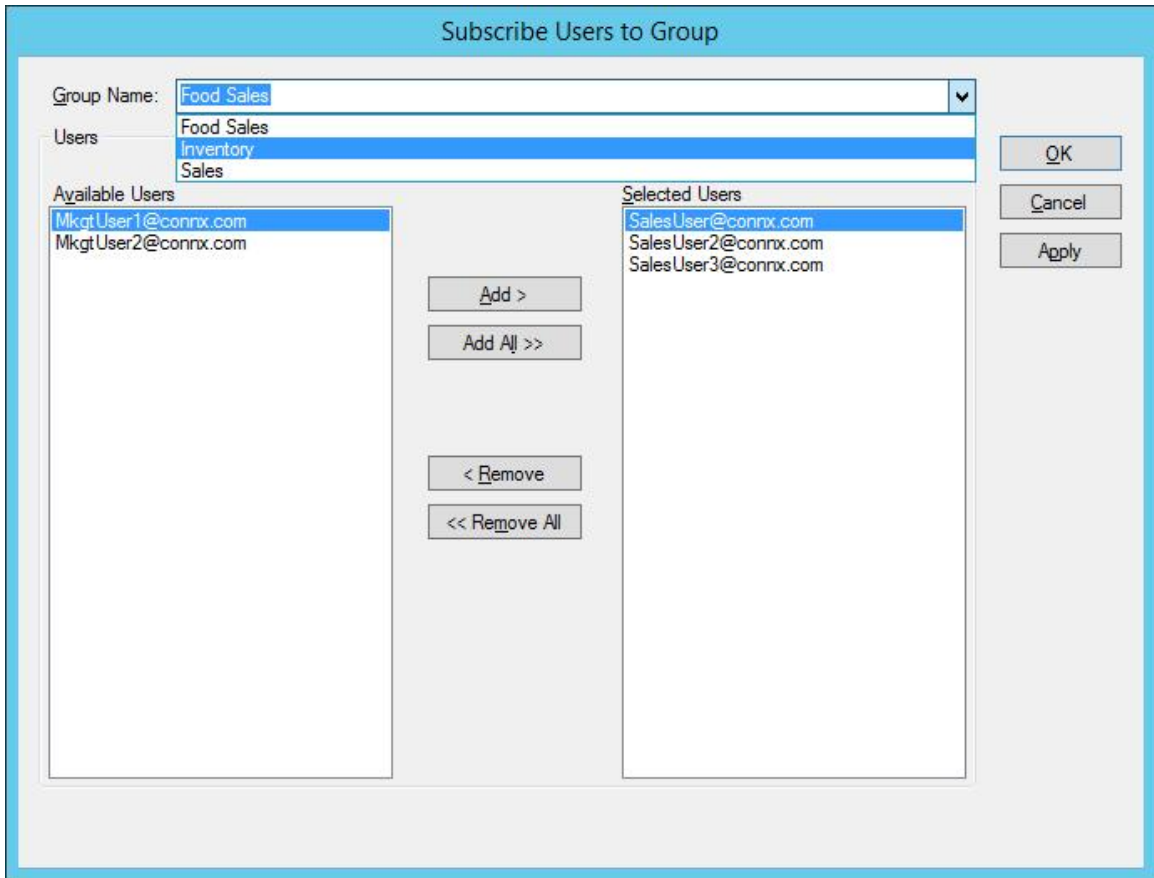
- This dialog has two lists. The **Available Users** list displays the users that are not yet subscribed to this Group. The **Selected Users** list displays the users that are currently

subscribed to this Group. Moving users from the Available list to the Selected list will subscribe the user to the selected Group and moving users from the Selected list to the Available list will removed the subscription. Changes will not be made until either the **Apply** or **OK** buttons are pressed.

3. To subscribe SalesUser3@connx.com to this Group, select that user and press the **Add** button.

The screenshot shows a dialog box titled "Subscribe Users to Group". At the top, there is a "Group Name" dropdown menu currently set to "Food Sales". Below this, the dialog is divided into two main sections: "Available Users" on the left and "Selected Users" on the right. The "Available Users" list contains two entries: "Mkgt User1@connx.com" and "Mkgt User2@connx.com". The "Selected Users" list contains three entries: "SalesUser@connx.com", "SalesUser2@connx.com", and "SalesUser3@connx.com". Between these two lists are four buttons: "Add >", "Add All >>", "< Remove", and "<< Remove All". On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

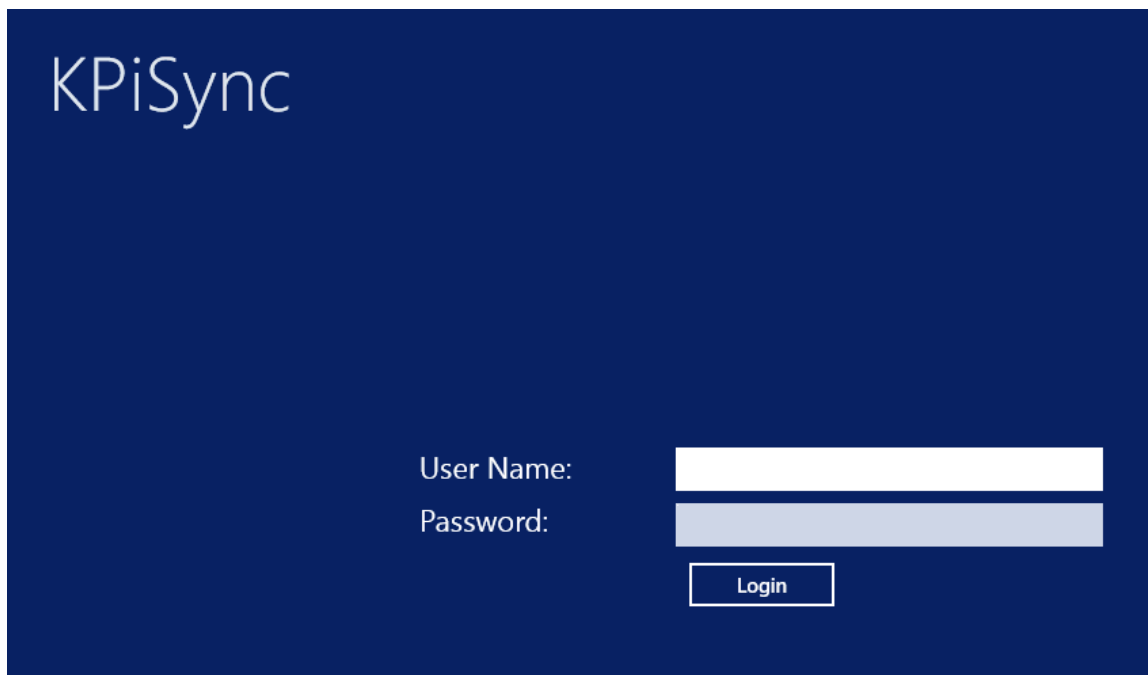
4. Press **OK** to update the KPiSync cloud server with the new subscription information. To work with another Group without leaving this dialog, press **Apply** to apply the current changes and then select a new Group from the **Group Name** pull down.



KPiSync Windows Store App

Using the KPiSync Windows Store App

1. Download the CONNX KPiSync Windows Store app from the Microsoft app store.
2. The first time you open the KPiSync app it will ask you to login. Use the user name and password set up by your administrator. If you do not have a user name and password, contact your administrator and they will use the CONNX KPiSync Administrator to create one for you.



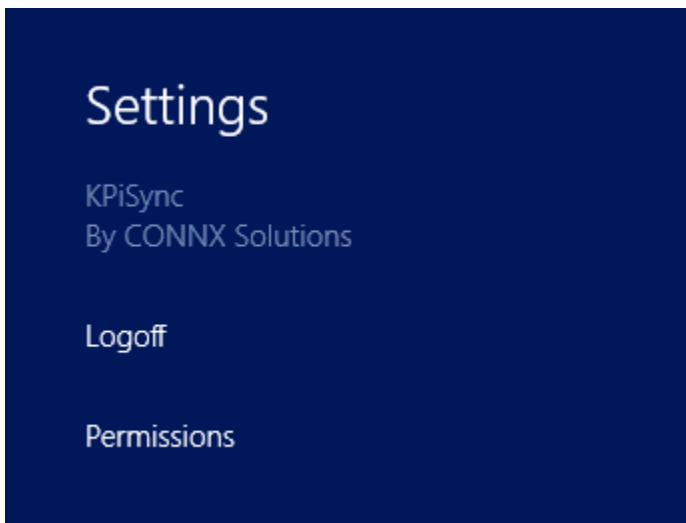
3. Once you log in, you will start receiving data points and updates as they are pushed out from the CONNX KPiSync administrator server.



- The data points will be in grouped together by subject, by double clicking or tapping on the group it will show all the data points in a single group



- To see a detailed description a specific data point, just double click or tap on that data point and it will expand to show a description.
- To stop receiving updates you can log off the KPiSync app by using the Settings on the right menu. Select Settings and log off, you will then have to log in again to start receiving notifications and data point updates.

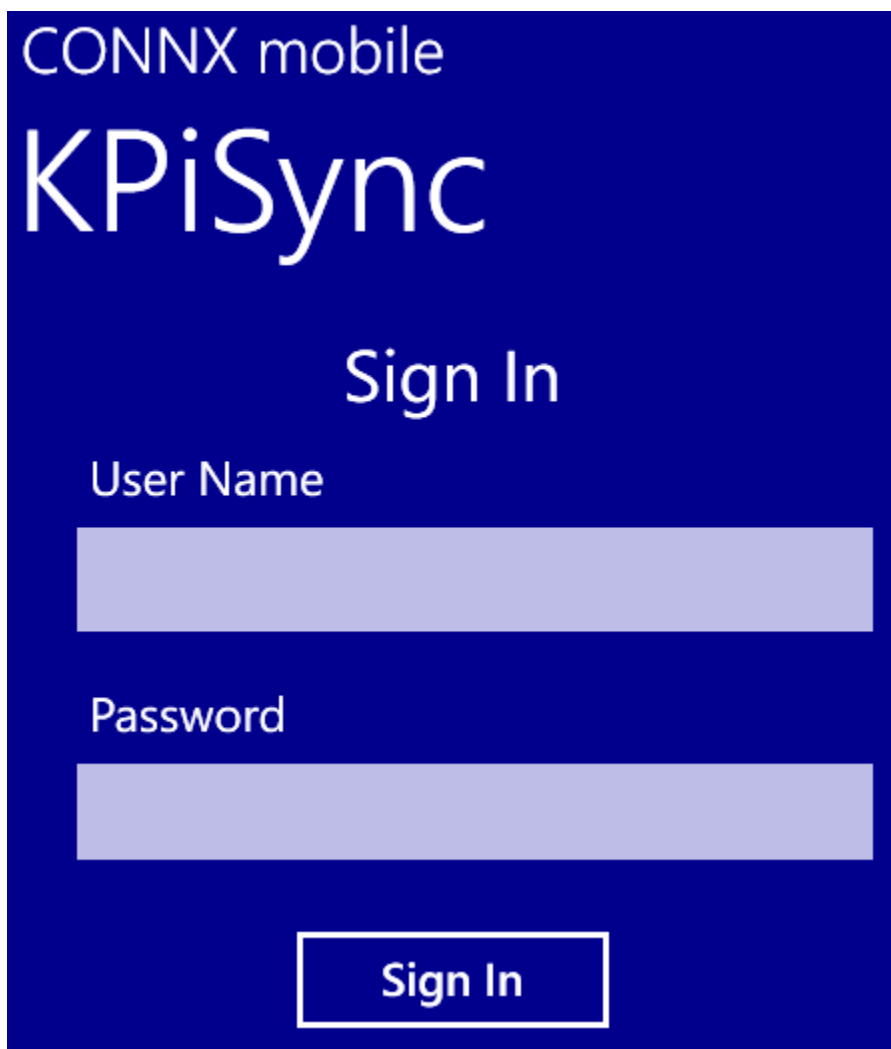


KPiSync Mobile App

Using the KPiSync Mobile App

The KPiSync Mobile App is supported on Windows Phone, Apple iPhone/iPad and Android phones. The screenshots below were taken on a Windows Phone. The iOS and Android screens may be slightly different, but the functionality is the same.

1. Download the CONNX KPiSync mobile app from the app store associated with your particular mobile platform.
2. The first time you open the KPiSync app it will ask you to login. Use the user name and password set up by your administrator. If you do not have a user name and password, contact your administrator and they will use the CONNX KPiSync Administrator to create one for you.



CONNX mobile

KPiSync

Sign In

User Name

Password

Sign In

3. Once you log in, you will start receiving data points and updates as they are pushed out from the CONNX KPiSync administrator server.



4. The data points will be in grouped together by subject, by tapping on a data point it will show the description of the data point. By selecting Enable Secondary Tile this data point will be pinned to the start screen. That way the this data can be seen without going into the app.



5. To stop receiving updates you can log off the KPiSync app by using tapping the three dots at the lower part of the screen. That will show a **Sign off** button, select that to log off, you will then have to log in again to start receiving notifications and data point updates.

CONNX mobile
KPiSync

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Cheese Sales

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