



FireArrow KPI Odometer Installation and User Guide



Notice

This document is a proprietary product of FireArrow and is protected by copyright laws and international treaty. Information in this manual is subject to change without notice and does not represent a commitment on the part of FireArrow. While reasonable efforts have been made to ensure the accuracy of the information contained herein, FireArrow assumes no liability for errors or omissions. No liability is assumed for direct, incidental, or consequential damages resulting from the use of the information contained in this document.

The copyrighted software that accompanies this document is licensed to the End User for use only in strict accordance with the End User License Agreement, which the Licensee should read carefully before commencing use of the software. No part of this publication may be reproduced, transmitted, stored in a retrieval system, nor translated into any human or computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual or otherwise, without the prior written permission of the copyright owner. This document may use fictitious names for purposes of demonstration; references to be actual persons, companies, or organizations are strictly coincidental.

Table of Contents

Chapter 1: Introduction	3
Chapter 2: Installation Guide	4
1. Installation Prerequisites	4
2. Installation Procedure	4
2.1 License Manager Installation.....	4
2.2 Product Activation Tool Installation	8
2.3 KPI Odometer Web Part Installation.....	11
3. Un-installation.....	17
4. License Management	18
Chapter 3: User & Administrative Guide.....	22
1. Web Part Overview.....	22
2. Web Part Setting Overview	23
2.1 Adding Indicator	24
2.2 Editing indicator	24
2.3 Selecting KPI Odometer Style.....	25
2.4 Setting Displaying Size	25
2.5 Setting Displaying Color	26
2.6 Setting Max KPI Odometer per Row	26
2.7 Setting Display Alignment	26
2.8 Show/hide elements	26
2.9 Auto Refresh.....	27
2.10 Configuring Caching.....	27
Chapter 4: Technical Support	28

Chapter 1: Introduction

The FireArrow KPI Odometer Web Part enables you to display KPI data in a graphical way in SharePoint. It visualizes KPI data through odometer styles with customizable display colors and flexible configurations.

Key Feature List:

- ✓ Display KPI data as KPI odometer
- ✓ Provide two elegant display styles
- ✓ Customizable display colors and size
- ✓ Configurable Min/Max scale values for KPI data
- ✓ Ability to manage KPI indicator source list
- ✓ Ability to set the numbers of KPI odometers to be displayed horizontally
- ✓ Adjust display alignment
- ✓ Arrange display order of selected KPIs
- ✓ Auto refresh using AJAX technology
- ✓ Configurable auto-refresh time interval
- ✓ Manual refresh using AJAX technology
- ✓ Caching capability
- ✓ Support SharePoint 2007&2010

Release Notes:

The latest product release is version 1.0.0.0

About This Guide:

This guide covers the information you need to install and use the KPI Odometer web part. It walks you through the process of installing and activating the web part in your SharePoint environment. In addition, it describes the configuration options and features provided by the web part in detail.

Chapter 2: Installation Guide

1. Installation Prerequisites

System Requirements :

- Microsoft Windows SharePoint Service 3.0
- Microsoft Office SharePoint Server 2007
- SharePoint 2010 Foundation or SharePoint 2010 Server

Supported Browser:





- Internet Explorer 6, 7, 8
- FireFox 3.0+
- Safari 4.0+
- Chrome

Language Support:

1. English

2. Installation Procedure

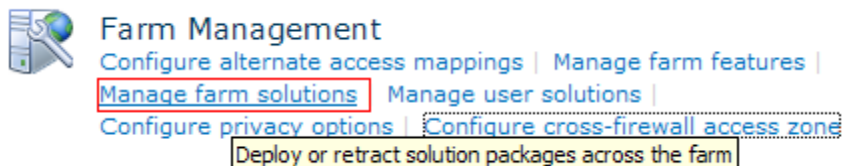
The KPI Odometer installation package contains the installation files for the following three components: License Manager Installation, KPI Odometer web part installation and Product Activation Tool Installation.

Name	Date modified	Type
 FireArrow.License1.0.0.0	8/7/2012 1:45 PM	File folder
 KPIOdometer1.0.0.0	8/7/2012 1:46 PM	File folder
 ProductActivation1.0.8	8/7/2012 1:45 PM	File folder
 KPI_Odometer_ManualV1.pdf	8/7/2012 1:52 PM	Adobe Acrobat D...

2.1 License Manager Installation

The License Manager is only required to install once on a server. If you have already installed it with other FireArrow products before, you can skip the installation steps but need to ensure it is deployed globally. To verify the installation and deployment, follow below steps:

1. Log into the SharePoint Central Administration. Go to the “System Settings” and select “Manage farm Solutions” under the “Farm Management” section.



2. Check if “firearrow.sharepoint.license.wsp” is in the solution list or not. If it is, it means License Manager has been already installed. If not, please skip to the next section to install the License Manager.






firearrow.sharepoint.advancedrssviewer.wsp	Deployed	http://sp2010test.env.firearrowsoft.com/
firearrow.sharepoint.license.wsp	Deployed	Globally deployed.
firearrow.sharepoint.livebanner.wsp	Deployed	http://sp2010test.env.firearrowsoft.com/

Note: During the installation process, the license manager solution is deployed globally

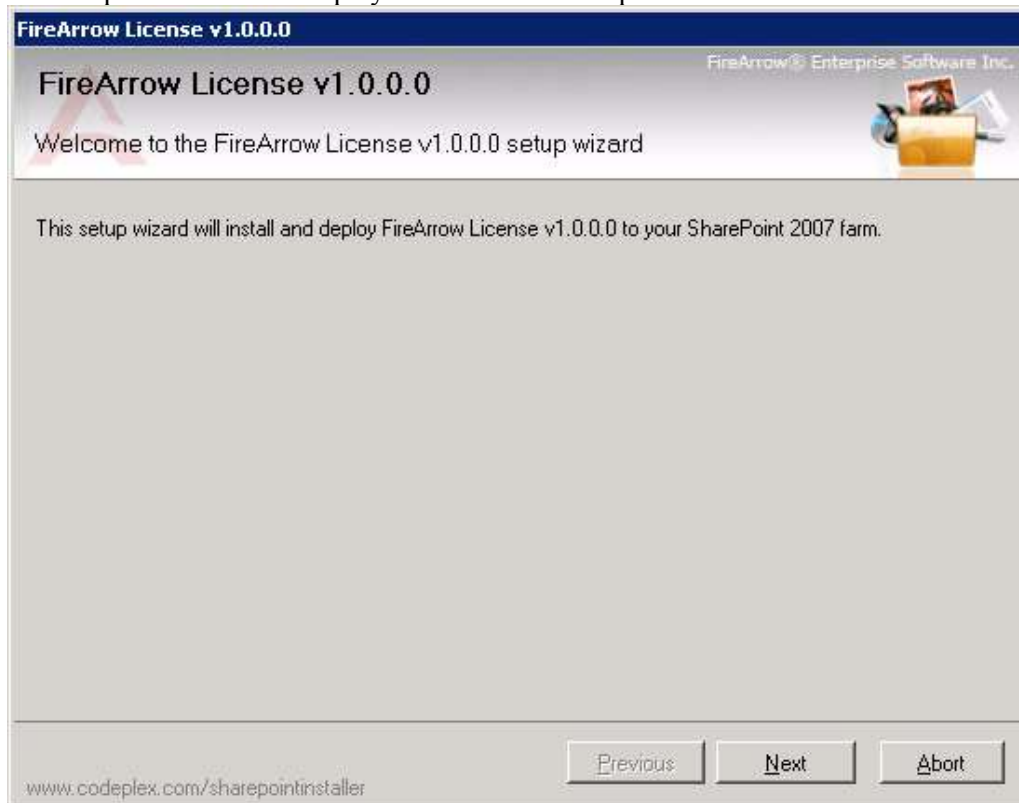
License Manager Installation Steps:

The steps to install the License Manager are as followed. You must be the SharePoint Farm Administrator for a successful installation.

1. Open the folder for License Manager Installation and run “Setup.exe”.

Name	Date modified	Type	Size
 banner	4/18/2010 5:08 PM	JPEG image	17 KB
 EULA	7/13/2009 9:36 AM	Rich Text Format	10 KB
 FireArrow.SharePoint.License	8/25/2010 2:41 PM	WSP File	33 KB
 Setup	4/1/2010 3:18 AM	Application	387 KB
 Setup.exe	8/15/2010 11:54 PM	CONFIG File	1 KB

2. The setup wizard will be displayed. Click “Next” to proceed.



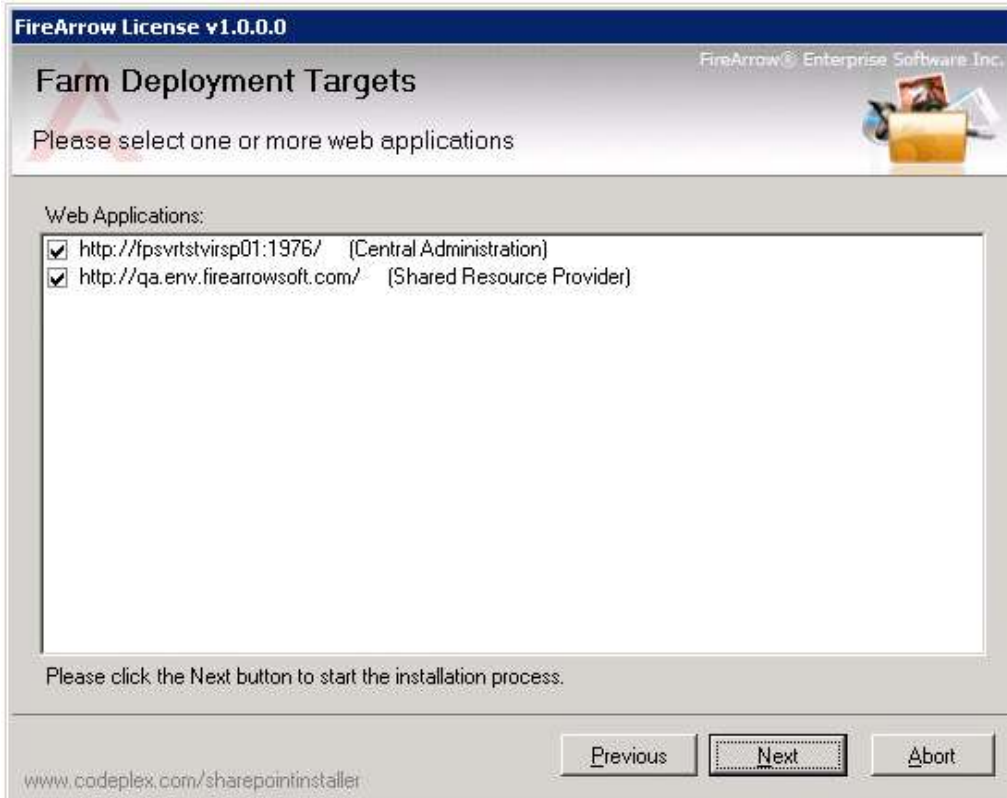
3. Wait for system check to complete and then click "Next".



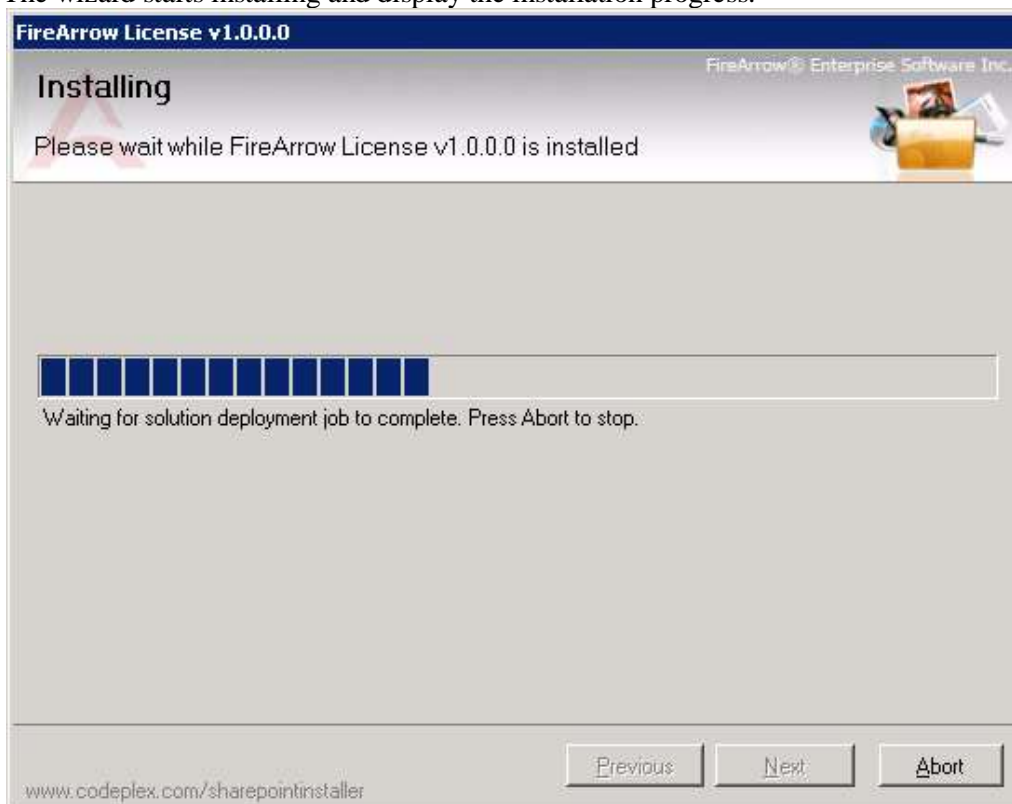
4. After you have read and accepted the License Agreement, click "Next" to continue.



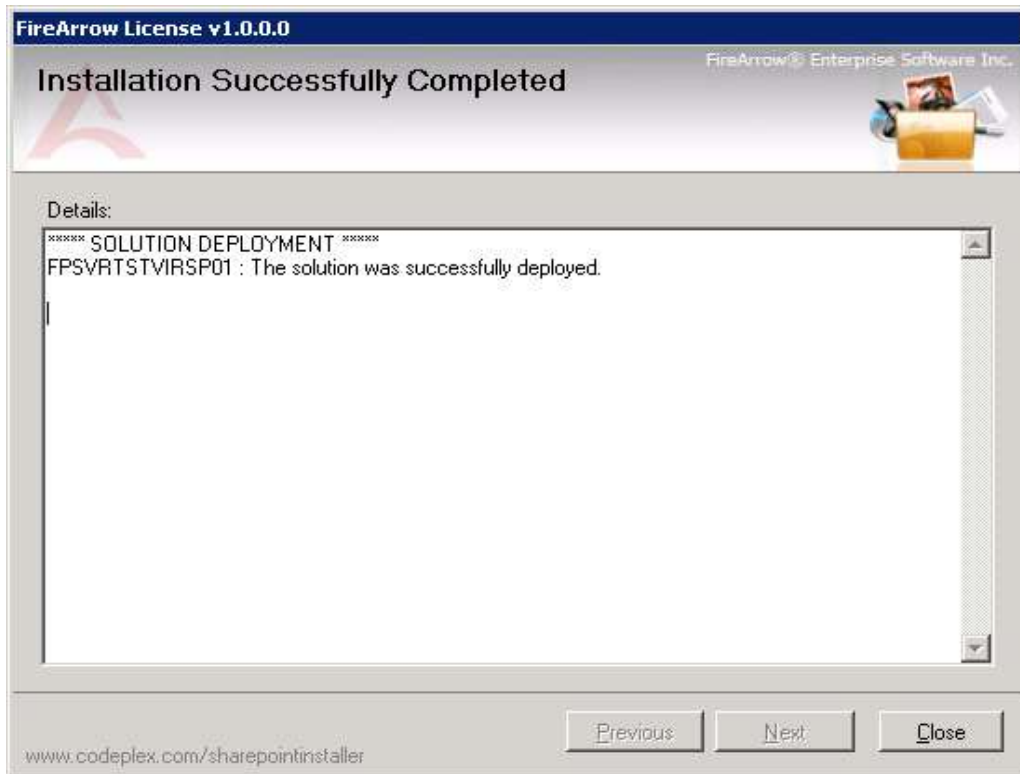
5. Select one or more target web applications and then click "Next".



- The wizard starts installing and display the installation progress.



- Installation is completed successfully and clicks “Close” to exit the wizard.



2.2 Product Activation Tool Installation

The Product Activation Tool will be used to active FireArrow products. Just like the License Manager, it is also only required to install once on a server.

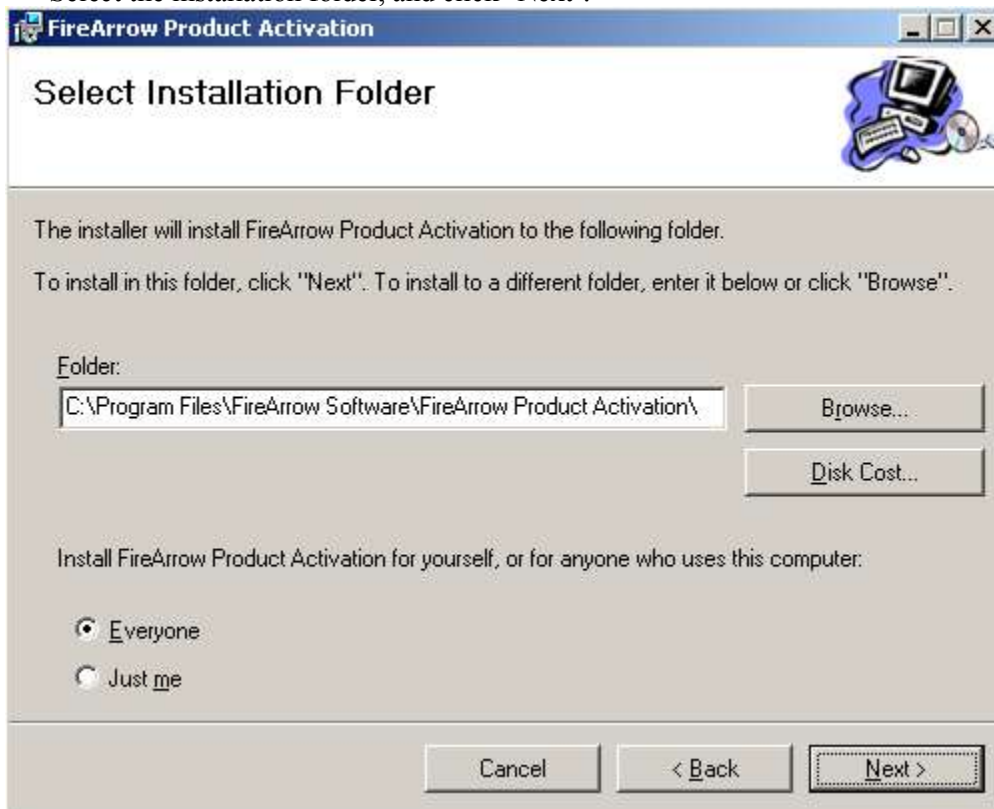
- Open the folder for Product Activation installation and run “Setup.exe”.

Name	Date modified	Type	Size
FireArrow.ProductActionvation.Installer	8/25/2010 4:05 PM	Windows Installer ...	537 KB
FireArrow.ProductActivation	8/25/2010 4:05 PM	Application	184 KB
FireArrow.ProductActivation.RunAs	8/25/2010 4:05 PM	Application	76 KB
setup	8/25/2010 4:05 PM	Application	421 KB

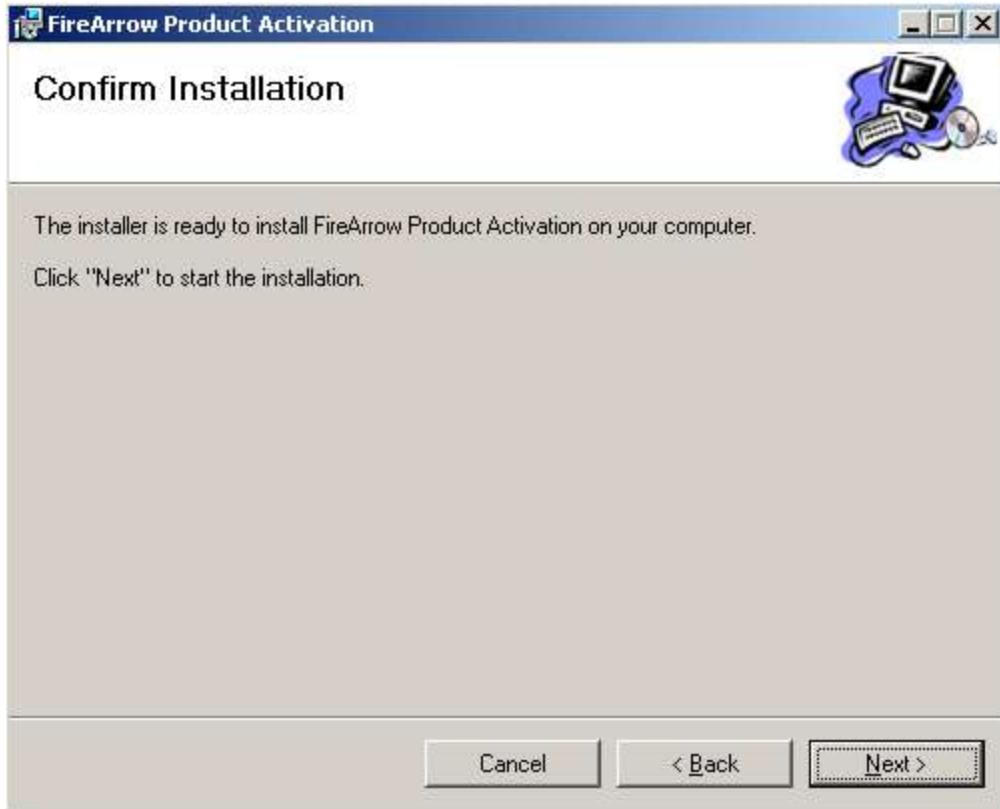
- The setup wizard will be displayed and click “Next” to proceed.



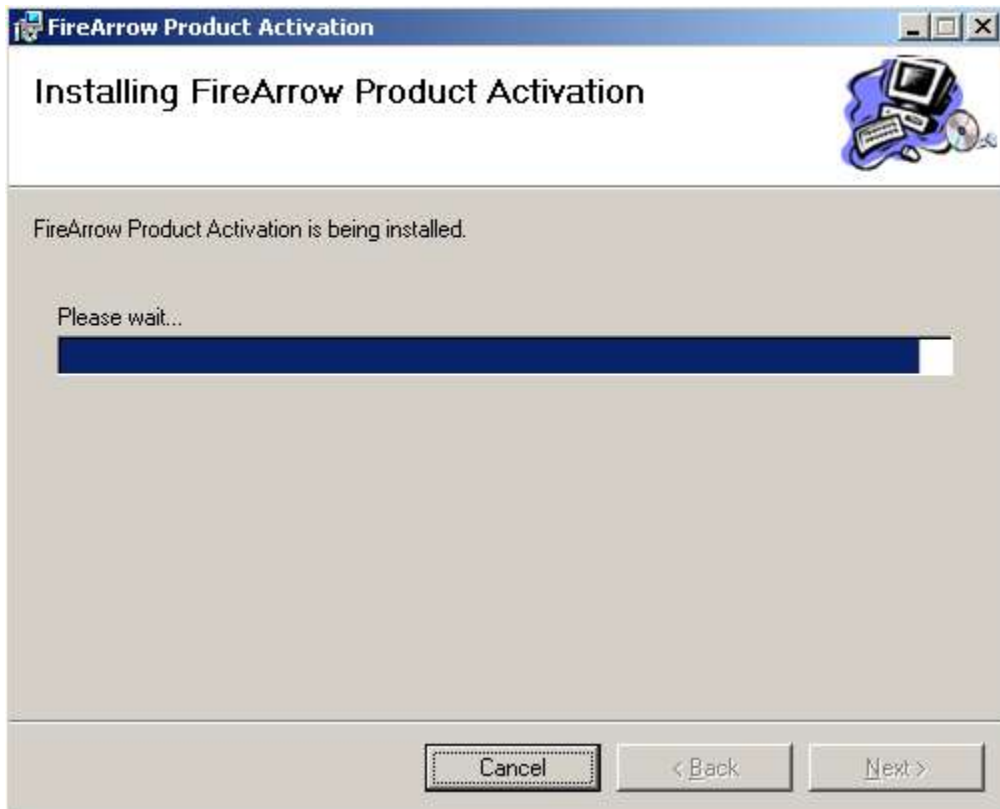
- Select the installation folder, and click 'Next'.



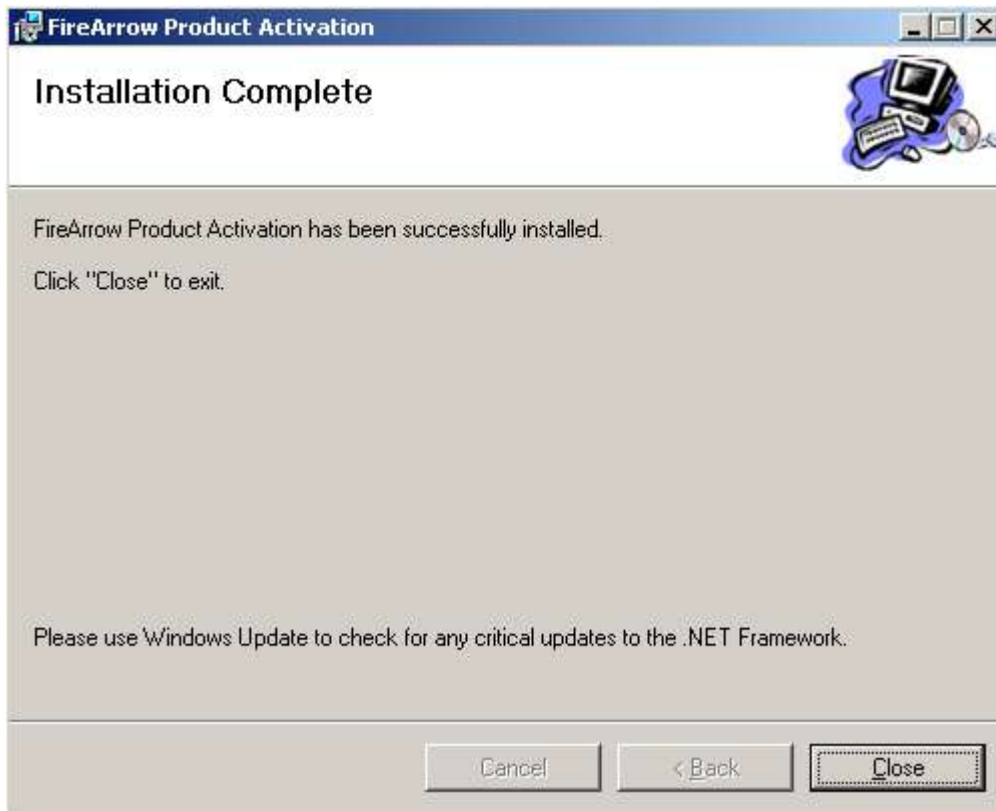
- Click 'Next' to confirm the installation.



- The wizard starts the installation and display the installation progress.



- Installation is completed successfully and clicks “Close” to exit the wizard.








2.3 KPI Odometer Web Part Installation

We provide two installation approaches for KPI Odometer web part installation. One is to use the installation wizard for automatic installation. The other way is to use STSADM command tool for manual installation. This section describes both approaches in detail.

Automatic Installation Approach

The KPI Odometer installation package contains the installer file, solution package file, image, and etc. You must be the SharePoint Farm Administrator for a successful installation. Please follow the following steps for installation.

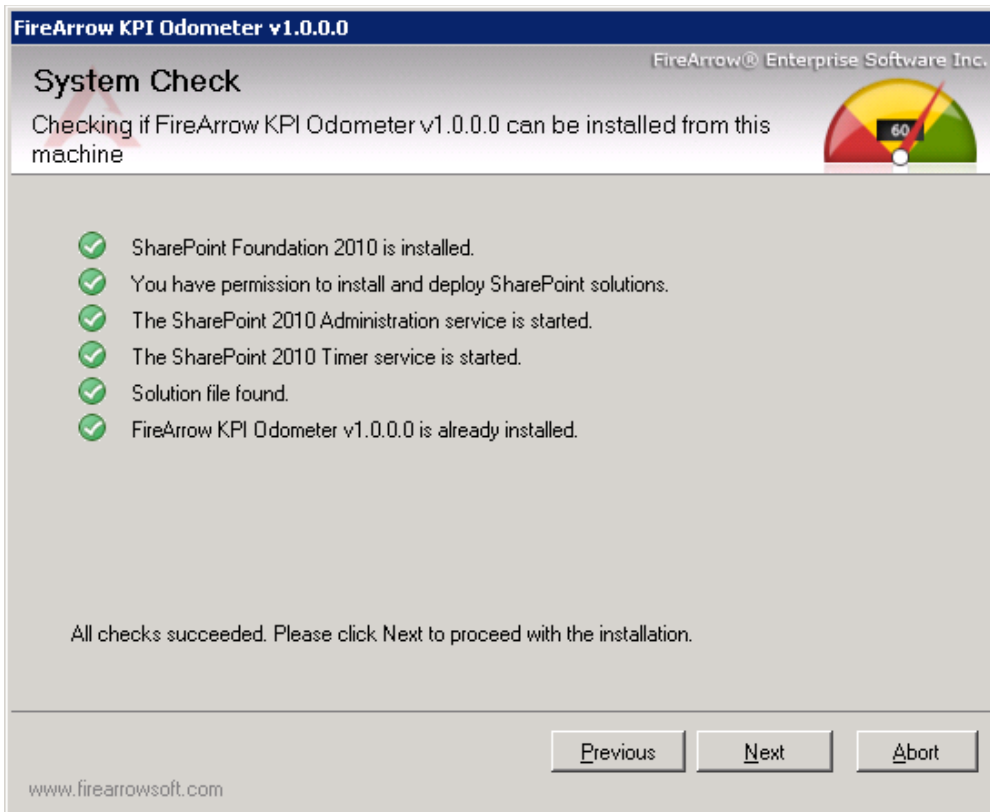
1. Open the folder for KPI Odometer installation and double click the “Setup.exe” to start the installation.

Name	Type	Size
 banner.jpg	JPEG image	16 KB
 EULA.rtf	Rich Text Format	10 KB
 FireArrow.SharePoint.KPIOdometer.wsp	WSP File	118 KB
 Setup.exe	Application	429 KB
 Setup.exe.config	CONFIG File	2 KB

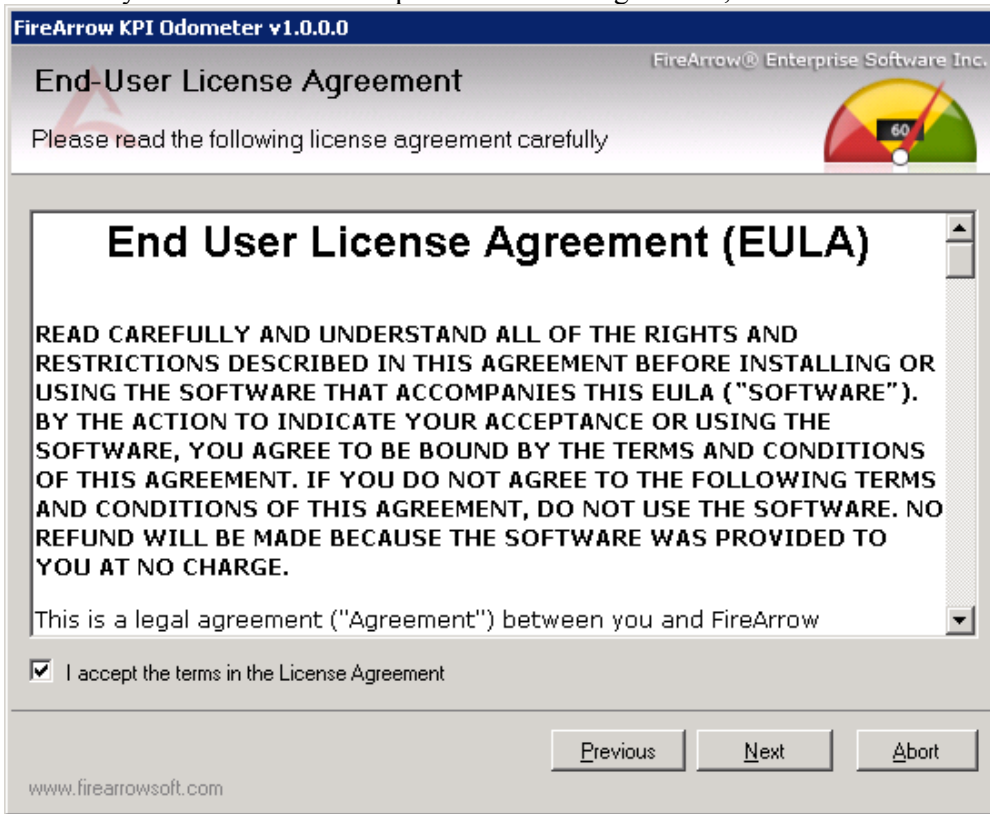
2. The setup wizard will be displayed. Click “Next” to proceed.



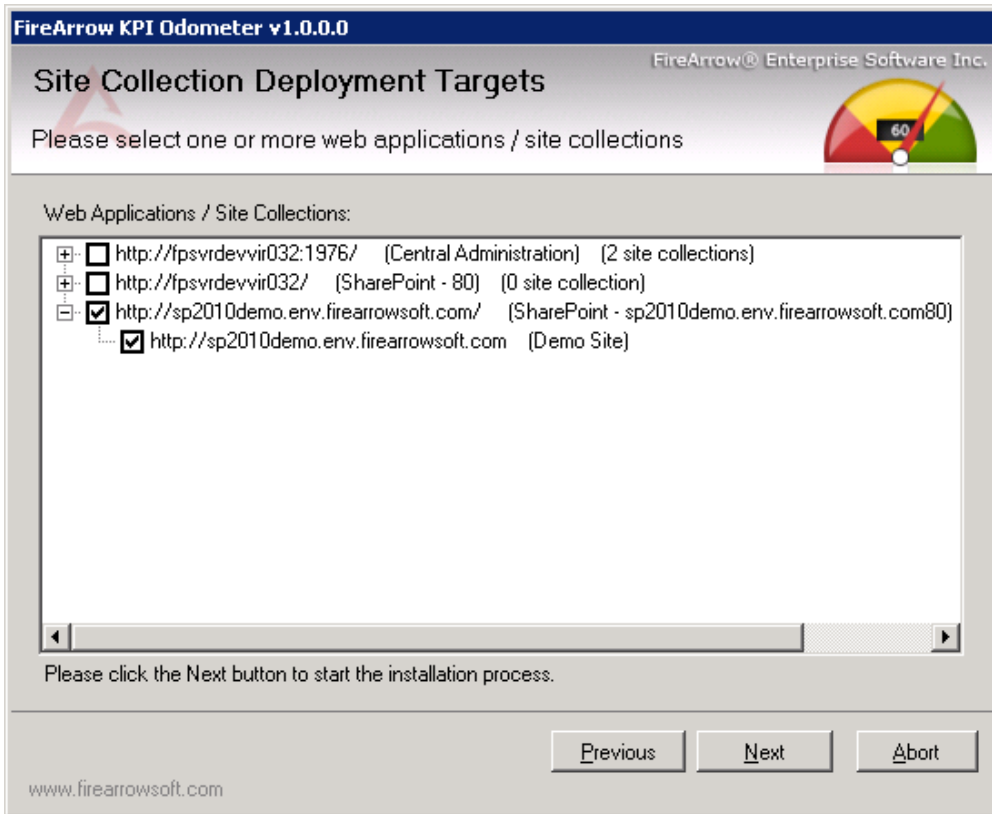
3. Wait for system check to complete and then click “Next”.



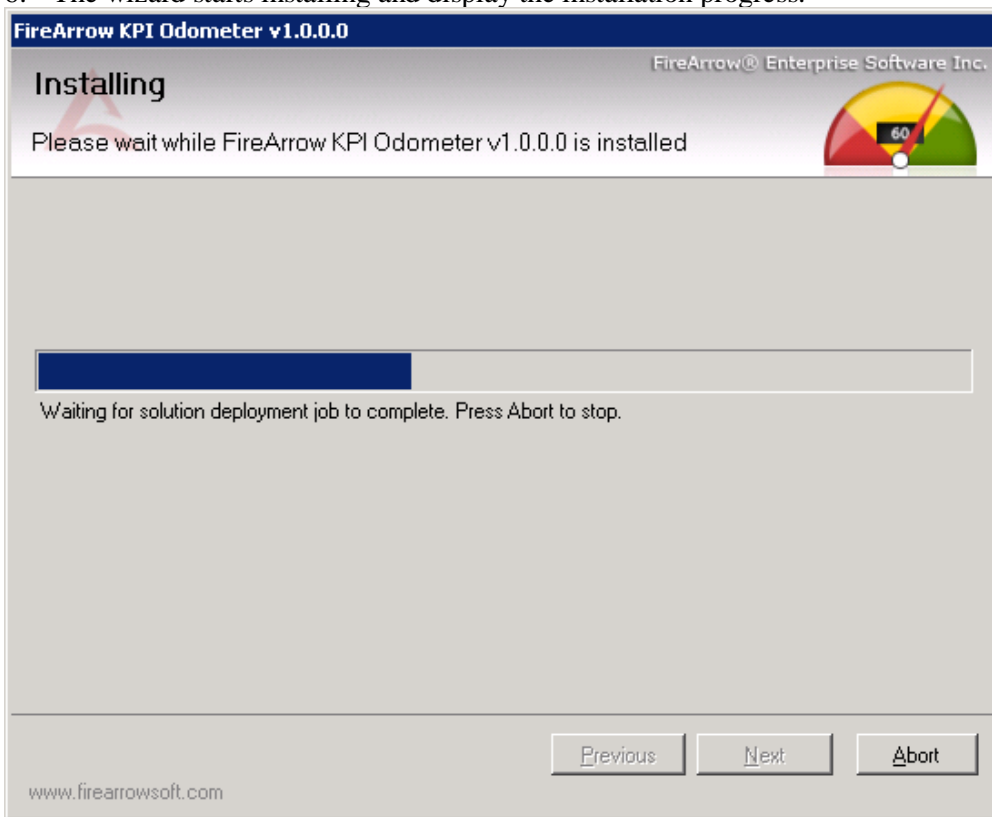
4. After you have read and accepted the License Agreement, click “Next” to continue.



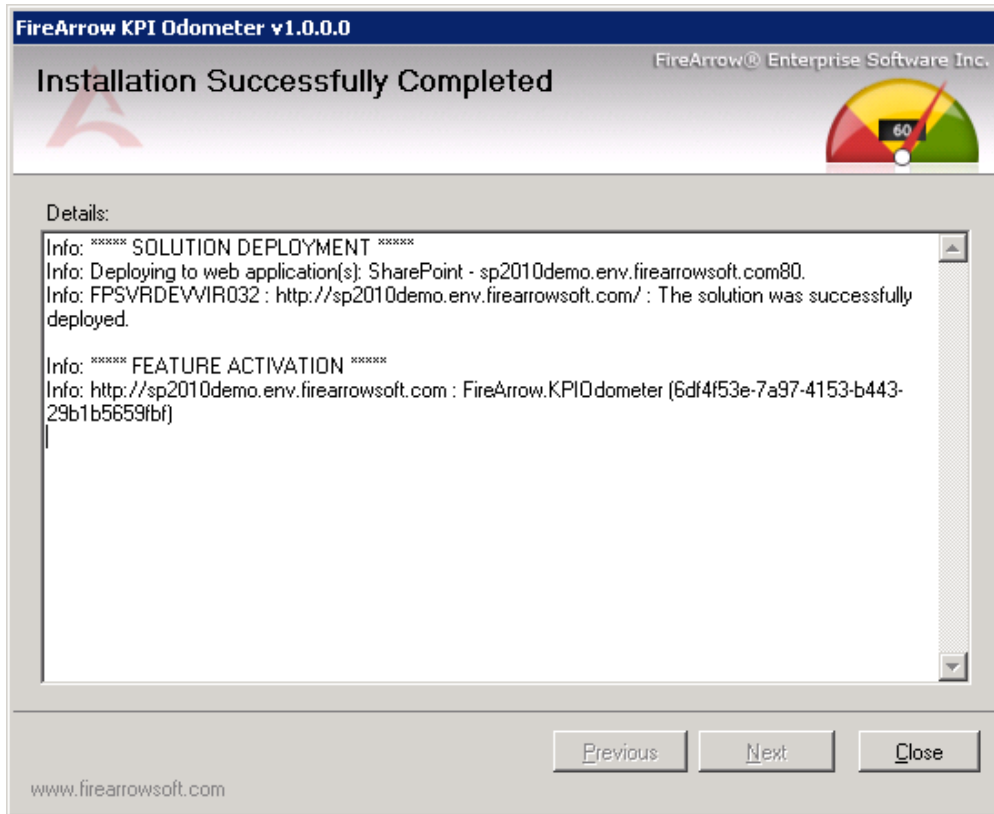
5. Select one or more target web applications and then click "Next".



6. The wizard starts installing and display the installation progress.



7. Installation is completed successfully and clicks "Close" to exit the wizard.



Manual Installation Approach

The folder for KPI Odometer installation contains the solution package which you need for manual installation.

Name	Type	Size
banner.jpg	JPEG image	16 KB
EULA.rtf	Rich Text Format	10 KB
FireArrow.SharePoint.KPIOdometer.wsp	WSP File	118 KB
Setup.exe	Application	429 KB
Setup.exe.config	CONFIG File	2 KB

The steps for manual installation are as followed:

1. Copy the solution package to the server farm and run following commands to add solutions to the server farm:
`stsadm.exe -o addsolution -filename "FireArrow.SharePoint.KPIOdometer.wsp"`
`stsadm -o execadmsvcjobs`
2. Then you need to deploy the solution package. You can deploy the solution package either by running STSADM commands or using the SharePoint 3.0 Central Administration web interface.

8. Option 1: running STSADM commands

You need to run the following two commands for solution deployment:

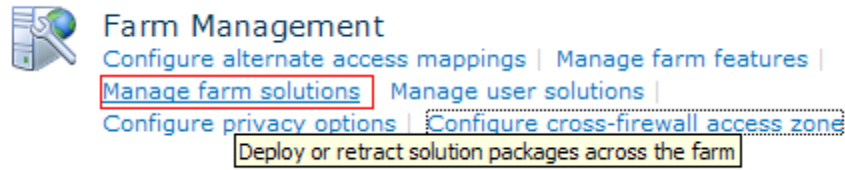
- 1) stsadm -o deploysolution -name "FireArrow.SharePoint.KPIODometer.wsp" -immediate -url http://qa.test.FireArrowsoft.com -force -allowCasPolicies

Note: replace the url (http://qa.test.firearrowsoft.com) with your target web application's url.

- 2) stsadm -o execadmsvcjobs

9. Option 2: using SharePoint 3.0 Central Administration Interface

- 1) Log into the SharePoint Central Administration. Go to the "System Settings" and select "Manage farm Solutions" under the "Farm Management" section.



- 2) Select the solution "FireArrow.SharePoint.KPIODometer.wsp", and then select Deploy Solution from the Solution Properties.

Microsoft SharePoint 2010 Central Administration > Solution Management
This page has a list of the Solutions in the farm.

	Name	Status	Deployed To
Application Management	firearrow.sharepoint.advancedrssviewer.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
System Settings	firearrow.sharepoint.advancedstockquote.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
Monitoring	firearrow.sharepoint.advancedweatherandclock.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
Backup and Restore	firearrow.sharepoint.crosssitelookup.2010.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
Security	firearrow.sharepoint.customchoice2010.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
Upgrade and Migration	firearrow.sharepoint.kpiodometer.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
General Application Settings	firearrow.sharepoint.license.wsp	Deployed	Globally deployed.
Configuration Wizards	firearrow.sharepoint.listintegrator.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.listsearch.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.livebanner.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.news.2010.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.newsrotator.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.photoviewer.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.progressbar2010.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/
	firearrow.sharepoint.ratingandreview.2010.wsp	Deployed	http://sp2010demo.env.firearrowsoft.com/

<ul style="list-style-type: none"> Central Administration Application Management System Settings Monitoring Backup and Restore Security Upgrade and Migration General Application Settings Configuration Wizards 	Deploy Solution Retract Solution Back to Solutions
<p>Name: firearrow.sharepoint.kpiodometer.wsp</p> <p>Type: Core Solution</p> <p>Contains Web Application Resource: Yes</p> <p>Contains Global Assembly: Yes</p> <p>Contains Code Access Security Policy: Yes</p> <p>Deployment Server Type: Front-end Web server</p> <p>Deployment Status: Deployed</p> <p>Deployed To: http://sp2010demo.env.firearrowsoft.com/</p> <p>Last Operation Result: The solution was successfully deployed.</p> <p>Last Operation Details: FPSRDEVVIR032 : http://sp2010demo.env.firearrowsoft.com/ : The solution was successfully deployed.</p> <p>Last Operation Time: 8/7/2012 1:49 PM</p>	

- Set the deployment job schedule and choose the target web application where the solution will be deployed.

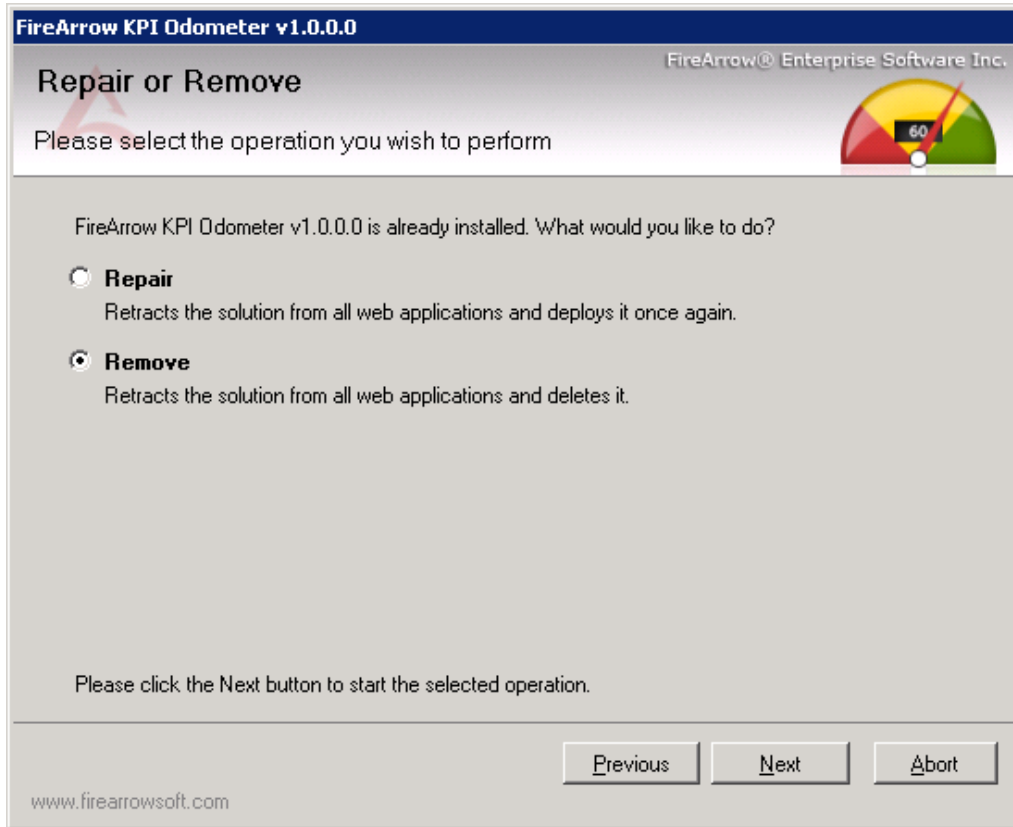
<ul style="list-style-type: none"> Central Administration Application Management System Settings Monitoring Backup and Restore Security Upgrade and Migration General Application Settings Configuration Wizards 	<p>Solution Information</p> <p>Information on the solution you have chosen to deploy.</p> <p>Name: firearrow.sharepoint.kpiodometer.wsp</p> <p>Locale: 0</p> <p>Deployed To: None</p> <p>Deployment Status:</p>
	<p>Deploy When?</p> <p>A timer job is created to deploy this solution. Please specify the time at which you want this solution to be deployed.</p> <p>Choose when to deploy the solution:</p> <p><input checked="" type="radio"/> Now</p> <p><input type="radio"/> At a specified time:</p> <p>8/7/2012 3 PM 00</p>
	<p>Deploy To?</p> <p>The solution contains Web application scoped resources and should be deployed to specific Web applications. Please choose the Web application where you want the solution to be deployed.</p> <p>Choose a Web application to deploy this solution:</p> <p>http://sp2010demo.env.firearrowsoft.com/</p> <p>Warning: Deploying this solution will place assemblies in the global assembly cache. This will grant the solution assemblies full trust. Do not proceed unless you trust the solution provider.</p> <p>Warning: This solution contains a Code Access Security policy. Deploying this solution will change the effective trust policy. Do not proceed unless you trust the solution provider.</p>

After the solution is deployed to target web application, run the command `"iisreset /noforce"` to restart IIS.

3. Un-installation

You can use FireArrow KPI Odometer Web Part Installer to uninstall KPI Odometer Web Part. To uninstall the web part:

- 1) Run the setup.exe on your system.
- 2) Select the radio button for “Remove” and click “Next”, the web part will be uninstalled.



4. License Management

The FireArrow KPI Odometer is allowed to use for 30-days after the installation without license activation. It is always recommended to provision your valid license activation key immediately after the installation is completed. Please go to the FireArrow web site (<http://www.firearrowsoft.com>) to purchase the software in order to obtain the license activation key.

After the software purchase, please email us (support@firearrowsoft.com) the following information in order to generate the product activation code:

1. Product key
2. Order confirmation #

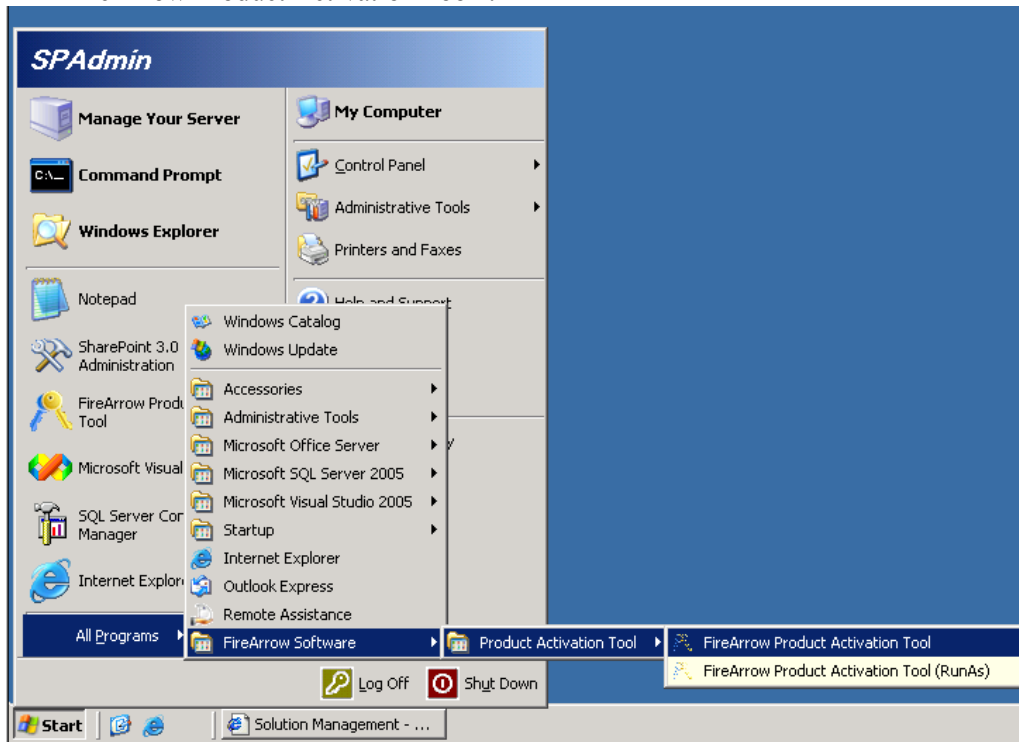
We will email you the product activation key.

You can obtain the product key information through the Product Activation Tool. Please follow steps in the below section to obtain the product key and complete the license activation.

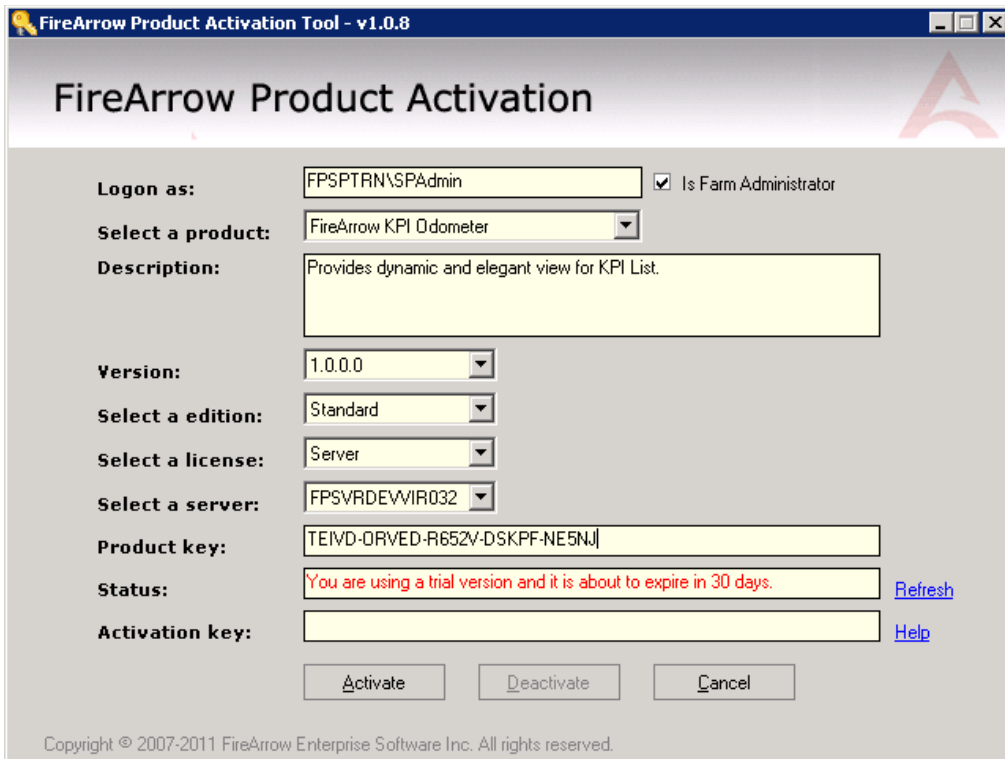
License Activation

After the Product Activation Manager is successfully installed, follow below steps to obtain the product key information and activate the FireArrow product license in your server.

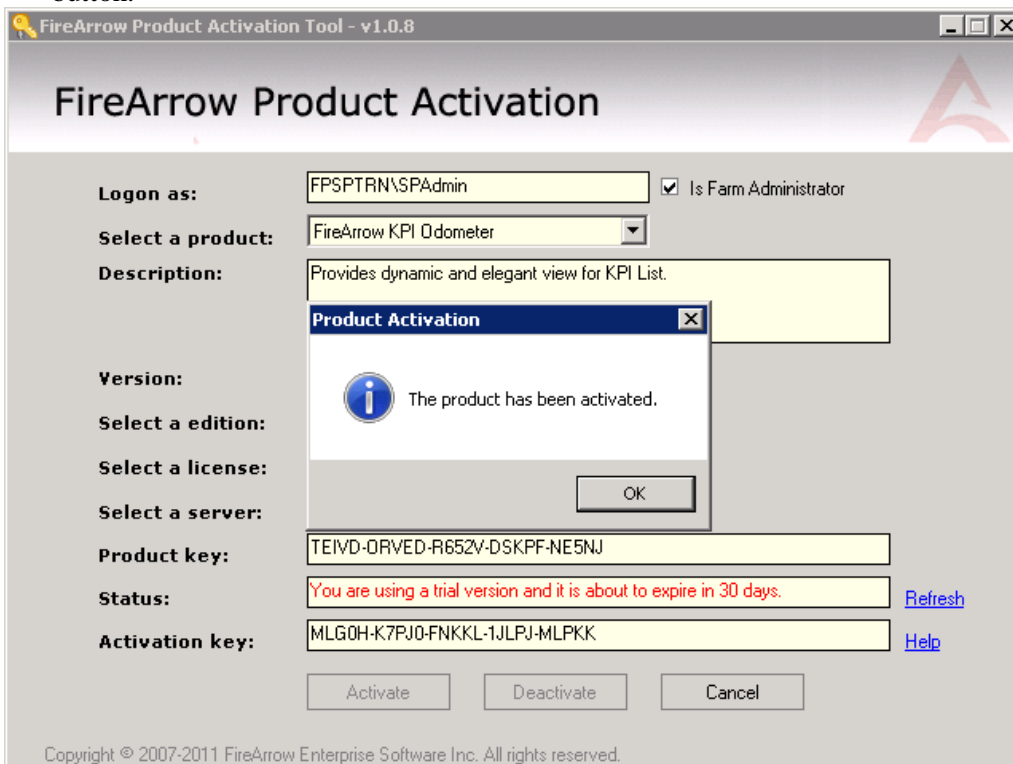
- Go to “Start” menu→All Programs→FireArrow Software→Product Activation Tool and click “FireArrow Product Activation Tool”.



- Select the ‘FireArrow KPI Odometer’ from the product dropdown list and the corresponding product information will be displayed in the form, including the “Product Key” information. You can also see the license status from the “Status” field. Before activation, the status will indicate you are using a trial version.



- Once you get the Activation Key, enter it into the ‘Activation Key’ field, and click ‘Activate’ button.



- Click OK in the pop-up window to confirm the activation. And you will notice that the message in the Status field is changed to “The product is activated”. The product activation is

completed.

FireArrow Product Activation Tool - v1.0.8

FireArrow Product Activation

Logon as: Is Farm Administrator

Select a product:

Description:

Version:

Select a edition:

Select a license:

Select a server:

Product key:

Status: [Refresh](#)

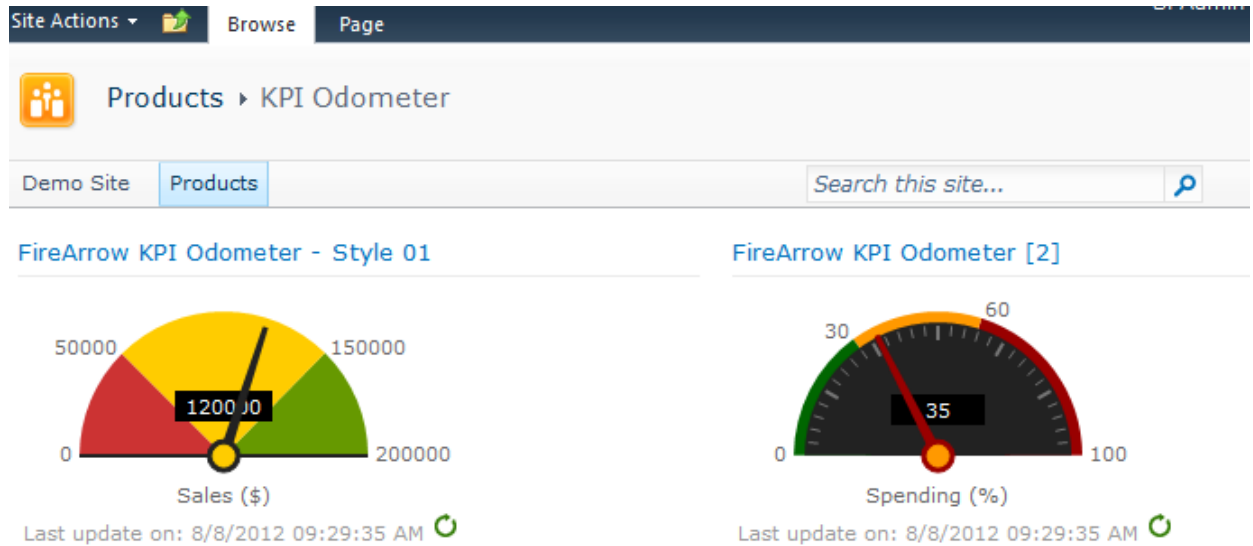
Activation key: [Help](#)

Copyright © 2007-2011 FireArrow Enterprise Software Inc. All rights reserved.

Chapter 3: User & Administrative Guide

1. Web Part Overview

Below the image shows user interface of KPI Odometer web part.



2. Web Part Setting Overview

FireArrow KPI Odometer - Style 1 X

+ Appearance

+ Layout

+ Advanced

KPI Odometer Setting

Site Url:*

Get

Available KPI Lists:*

1 Available Views:*

Available KPI List Items:*

Odometer Title:*

2 Min Scale Value:*

Max Scale Value:*

Add/Update Clear

Added Indicators:

3 Sales

Up Down Delete

Style:

4 Style 01

Style 02

Display Size:

5 Predefined Radius

80

Custom Radius

150

Display Color:

6 Color 02

Max KPI Odometers Per Row:

7 1

Display Alignment:

8 Left

9 Show Last Update Timestamp

10 Show Manual Refresh Button

11 Auto Refresh: 120 mins

12 Enable Caching

Caching Time-out(seconds)

60

About Web Part

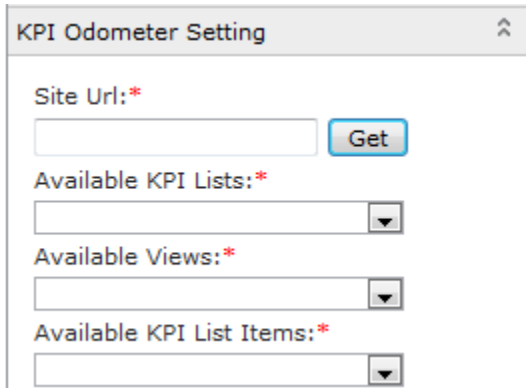
OK Cancel Apply

Key to areas on interface:

1. Set indicator source
2. Set min/max scale value
3. Indicator source list
4. Set display style
5. Set display size
6. Set display color
7. Set maximum odometers displayed per row
8. Set display alignment
9. Show/hide last update timestamp
10. Show/hide auto refresh icon
11. Set auto-refresh interval
12. Caching setting

2.1 Adding Indicator

The FireArrow KPI Odometer Web Part allows you to select indicators from SharePoint KPI lists.



The screenshot shows a dialog box titled "KPI Odometer Setting" with a close button (upward arrow) in the top right corner. It contains four input fields, each with a red asterisk indicating it is required:

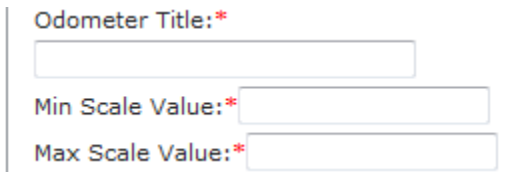
- Site Url:***: A text input field followed by a blue "Get" button.
- Available KPI Lists:***: A dropdown menu.
- Available Views:***: A dropdown menu.
- Available KPI List Items:***: A dropdown menu.

Site Url: Enter the site url where KPI indicators come from and click “Get” button.

Available KPI Lists: Select a target KPI list from the dropdown list which contains all available KPI lists from the source site.

Available KPI List Items: Select a target KPI indicator from the dropdown list, which contains available list items from the selected KPI list.

Once a targeted KPI indicator is selected, set the title and min/max scale values for it as below settings.



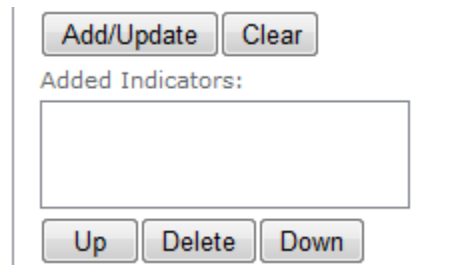
The screenshot shows three input fields for configuring the selected indicator:

- Odometer Title:***: A text input field.
- Min Scale Value:***: A text input field.
- Max Scale Value:***: A text input field.

Odometer Title: Type a title for the selected indicator.

Min/Max Scale Value: Set the min/max scale values for the odometer.

The newly added indicator will be displayed in the ‘Added Indicators’ list. Use ‘Up’ or ‘Down’ buttons to adjust display order of KPI indicators, and “delete” button to remove a KPI indicator.



The screenshot shows the "Added Indicators" section of the web part. It includes:

- Two buttons at the top: "Add/Update" and "Clear".
- A label "Added Indicators:" above a large empty rectangular box representing the list.
- Three buttons at the bottom: "Up", "Delete", and "Down".

2.2 Editing indicator

To edit an indicator, select it from the “Added Indicators” list and then click on it to populate its associated settings in these fields as shown below.

Site Url:*

Available KPI Lists:*

KPI List

Available Views:*

All Items

Available KPI List Items:*

Sales

Odometer Title:*

Sales

Min Scale Value: * 0

Max Scale Value: * 100

Added Indicators:

Sales

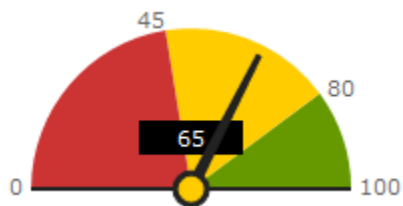
Total Cost

Once editing is finished, click on 'Add/Update' button to save changes.

Note: If the title of a KPI indicator is changed, clicking on 'add/update' button will add a new KPI indicator to the source list instead of updating the existing one.

2.3 Selecting KPI Odometer Style

KPI Odometer Web Part provides two display styles, as shown blow.



Dashboard style 01



Dashboard style 02

2.4 Setting Displaying Size

Select one of the pre-defined sizes from dropdown list or choose to set a custom size.

Display Size:

Predefined Radius

100

Custom Radius

2.5 Setting Displaying Color

Select one of the pre-defined colors from dropdown list or set custom colors by entering color codes for each display element. Below image shows the custom color setting.

Display Color:

Custom

Met or Exceeded Goals: #009933

Met or Exceeded Warnings: #FF9900

Otherwise: #CC0000

Hand: #666666

2.6 Setting Max KPI Odometer per Row

Use below setting to control the maximum number of odometers displayed horizontally in web part zone.

Max KPI Odometers Per Row:

3

2.7 Setting Display Alignment

Use below setting to adjust the display alignment of the Odometer in the web part zone.

Display Alignment:

Left

2.8 Show/hide elements

Use below settings to show or hide late update timestamp and manual refresh button.

Show Last Update Timestamp

Show Manual Refresh Button

2.9 Auto Refresh

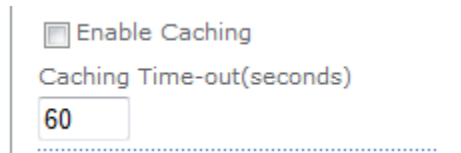
Enable the auto-refresh feature by checking the “Auto Refresh” checkbox and entering a desired time interval.



The screenshot shows a configuration panel with a vertical border. At the top, there is a checkbox labeled "Auto Refresh:" followed by an empty text input field and the text "mins". Below this, there is a horizontal dotted line.

2.10 Configuring Caching

Enable caching feature by checking the “Enable Caching” checkbox and setting a desired time interval.



The screenshot shows a configuration panel with a vertical border. At the top, there is a checkbox labeled "Enable Caching". Below it is the text "Caching Time-out(seconds)". Underneath that is a text input field containing the number "60". Below the input field is a horizontal dotted line.

Chapter 4: Technical Support

Please feel free to contact our technical support team if you have any question or encounter any technical difficulty.

Technical Support: support@firearrowsoft.com

Please visit our web site (<http://www.firearrowsoft.com>) for any product update and answers to frequently asked questions.