



KPIworks Server V1.00

Installation and User Guide

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Chapter One

About KPIworks Server

This chapter introduces **KPIworks Server**, including an introduction to not only the product itself, but the documentation package as well. This manual contains an overview of the product, detailed installation instructions, and KPIworks Administrator user instructions.

Getting Started

This manual contains procedural and conceptual information about **KPIworks Server**. It was written to help Server Administrators install and maintain **KPIworks** and also to provide them with a general knowledge of how the product works.



While it is not required that the user have any prior programming, marquee or communications experience, the user should understand basic Windows concepts. These concepts are described in detail in the KPIworks Administrator section of the manual. The KPIworks Administrator is used to maintain **KPIworks Server** and to perform everyday tasks such as adding and removing marquees, and viewing transaction logs.

While this guide exists primarily as a user guide, it also contains detailed information regarding the installation of **KPIworks Server**. The installation section takes you through installation procedures, setup instructions and general requirements

The terminology used in this manual is defined in the glossary end of this manual.

Documentation Conventions











This document contains the following documentation conventions to help you navigate through the manual and obtain a better understanding of the material.

-  Notes contain tips or reminders about procedural and conceptual information within the manual.
-  Cross-references provide you with a link to further information about the section of the document you are currently reading.

Using the Toolbar

The KPIworks toolbar allows you to quickly access menu items at the click of a button. The toolbar is located below the menu at the top of the screen.

Toolbar

	Allows you to move up one folder level
	Saves changes
	Click to create a new Marquee Server, Device, Marquee, or Distribution List
	Allows you to edit Devices, Marquees, and Distribution Lists by just selecting on the folder and clicking this icon.
	Delete the current item
	Allows you to enter in text to search for an item by Device, Marquee or Distribution List folder.
	Changes how you would like to display items in the right pane – Large icons, Small icons, List or Details
	Print out a list of Devices, Marquees or Distribution Lists
	Allows you to disable or enable devices or marquees or put them into test mode
	Launches online help file

KPIworks Server Features

KPIworks Server is a marquee management system that allows you to easily communicate to a variety of different marquees, using a simple generic language.

Main features of KPIworks Server include:

- Simple, efficient installation wizards make for easy installation
- Supports distribution lists
- User-friendly maintenance of Devices, Marquees, Distribution Lists, etc.
- Unlimited marquees and distribution lists
- Detailed transaction logging and viewing of these logs.
- Supports direct serial connections, TCP/IP sockets and RF connected marquees
- Online reconfiguration of any engine setting or device/marquee configuration.
- Supported Manufacturers/Models:
- AdaptiveMicro - All models
- Prioritization of messages

Chapter Two

Conceptual Overview

This chapter describes **KPIworks Server** in detail. It begins with a brief system overview of the product and finishes with a general description of the main components of the product.

This chapter was included to provide background information about the product itself and some of the concepts involved in marquee displays. Users who are familiar with these concepts do not need to read this chapter.

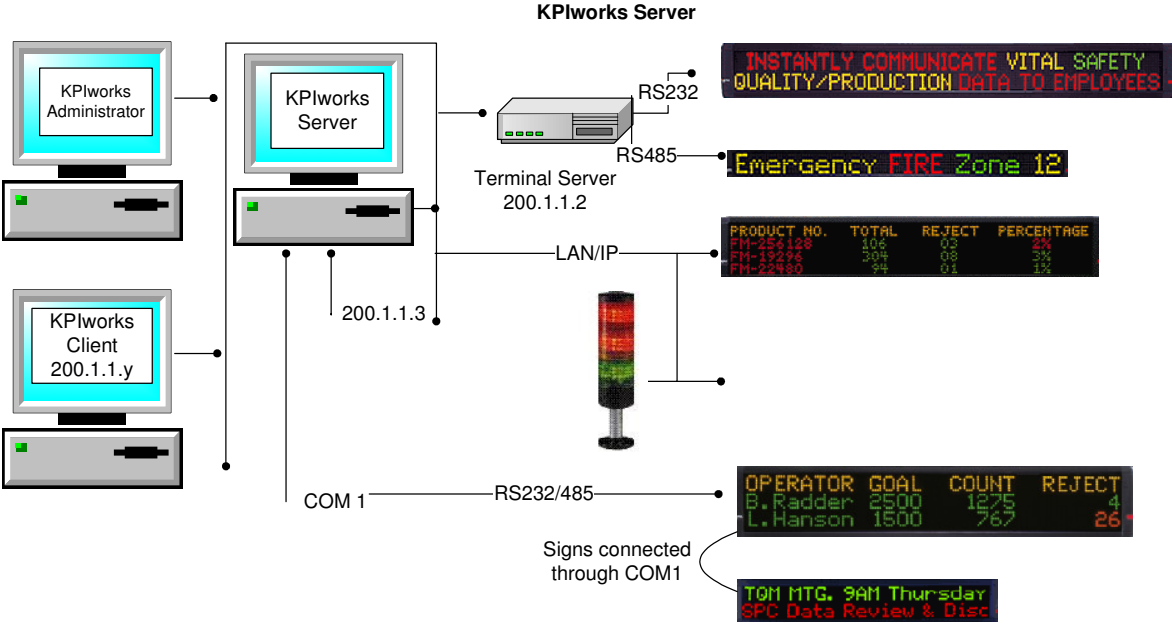
How It Works

KPIworks Server provides its clients with a single unified interface for dispatching text messages to numerous different marquee manufacturers and models. The model and connection method is irrelevant; **KPIworks Server** formats and delivers the message to the marquee for you.

To accomplish this task KPIworks first utilizes a concept of a Device. A Device in KPIworks is the physical path that the engine will utilize to connect to the marquee. Examples of devices include serial ports, TCP/IP sockets, or RF connections via **FirstPAGE Server**. Once the device is named and defined then it may be used to define marquees.

Using this device connection **KPIworks Server** communicates to the marquee using the manufacturers' protocol defined for the marquee.

For each marquee a unique marquee id is sent along with the message to identify the end destination on the marquee network. The creation of a marquee in **KPIworks Server** allows you to use a familiar name in place of the unique marquee network id, which is often numeric and not easily remembered. The result of these message transactions are logged within the **KPIworks Server** logs for later review.

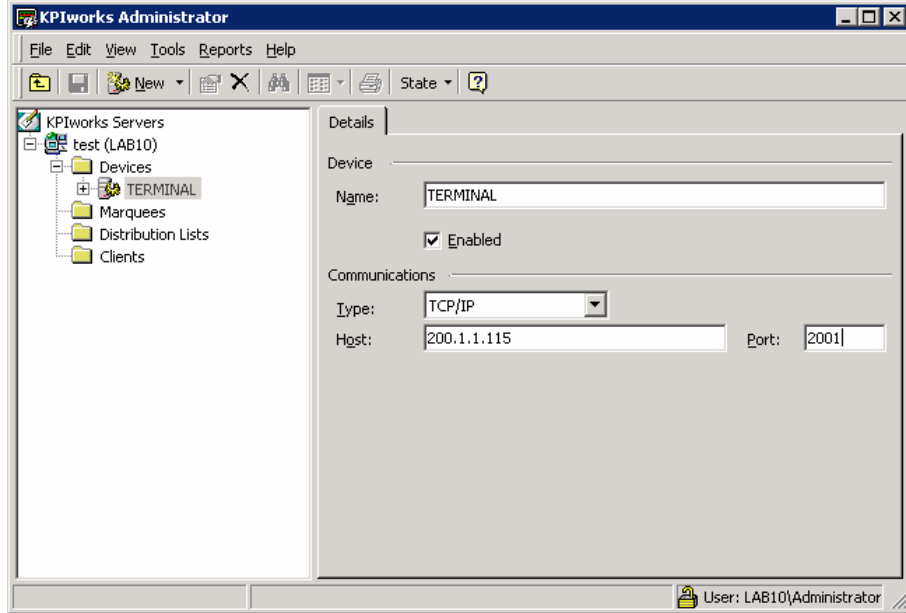


Configuration Examples

In this example marquee signs are configured using a number of different Devices: terminal server, an IP connection, and COM 1 port on the Marquee Server. The following are examples of the addition of Devices for each of these marquees:

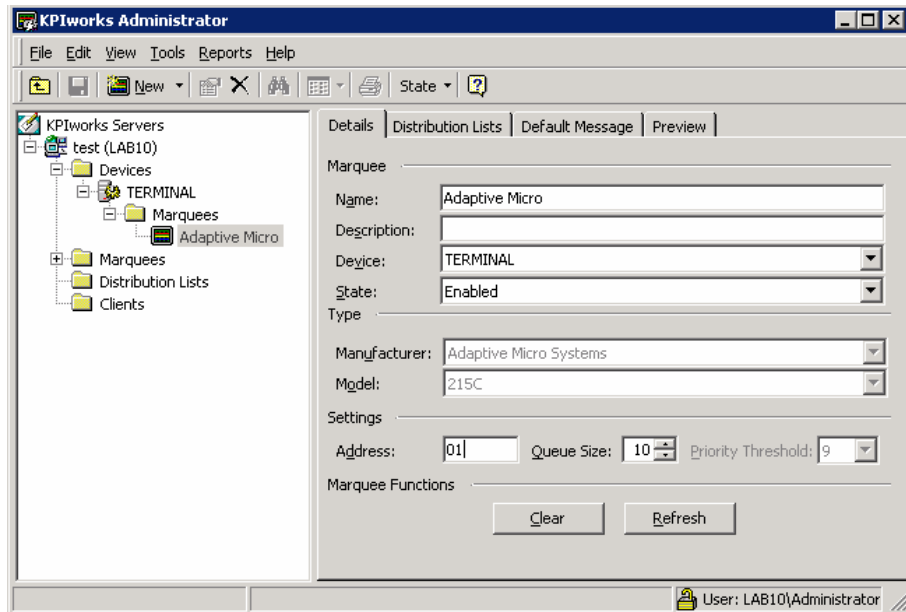
Example A

Sign connected via terminal server



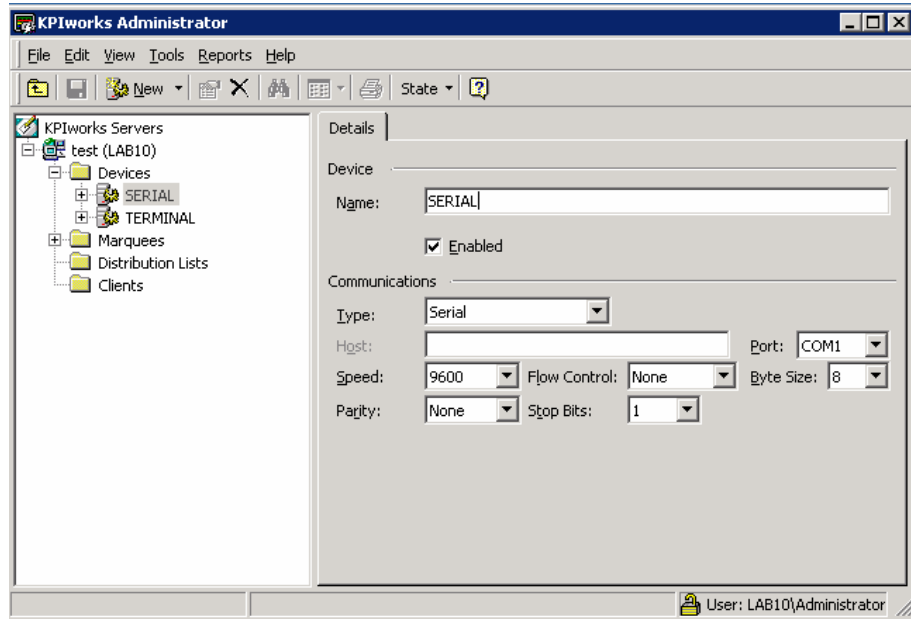
The *Host* and *Port* on this Device will be the IP address and port used to connect to the terminal server. The Adaptive Micro sign is connected via this terminal server:

Adaptive Micro Sign

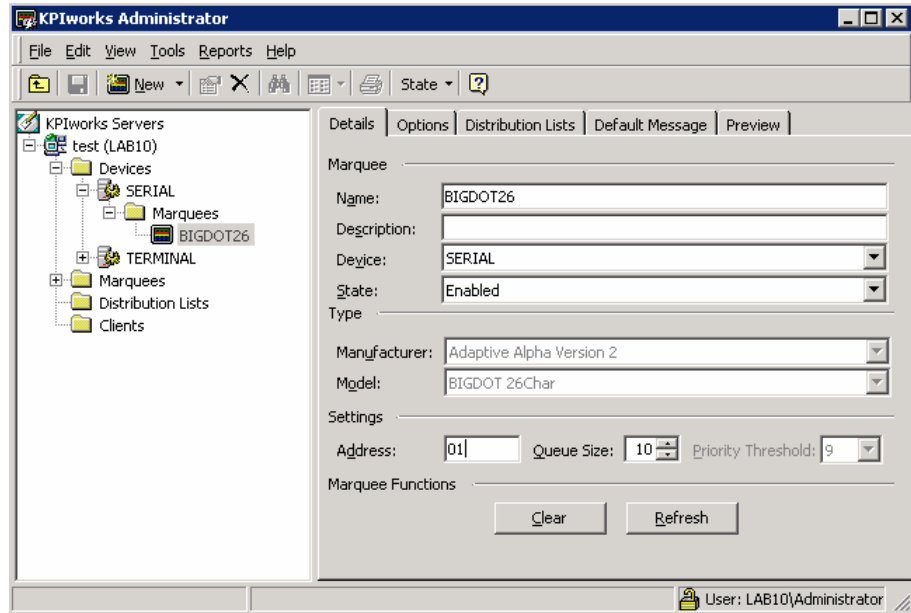



Example B:

Sign connected via COM port:



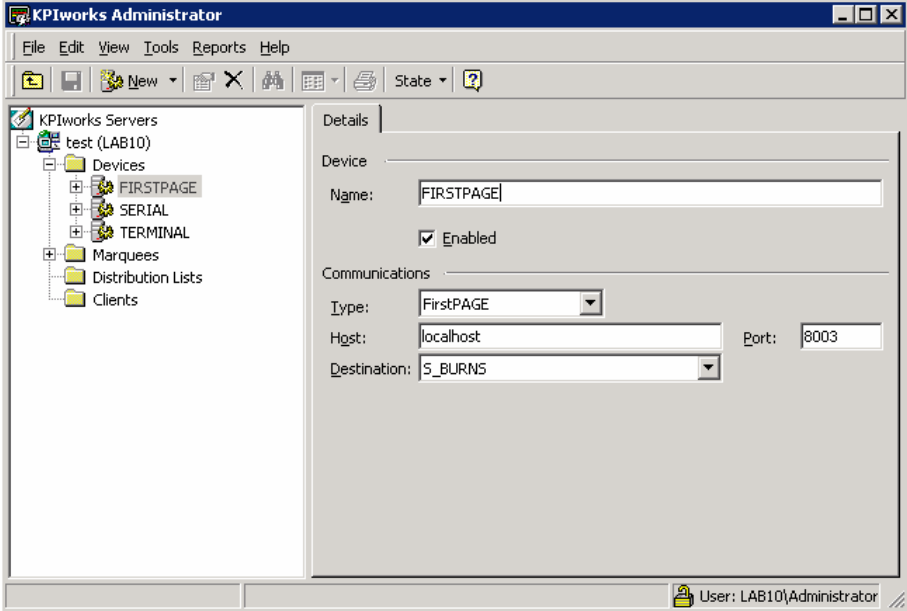
Adaptive Alpha Version 2 sign



 More than one sign may connect through the same COM port

Example C:

Sign
connected
via RF
connection
to
FirstPAGE:



Select the Host and Port of the *FirstPAGE* Server in the *Host:* and *Port:* fields, then select a *FirstPAGE* Destination from the drop down menu. The message will be sent to this destination.

The KPIworks Administrator

The KPIworks Administrator utility program is used to configure and control the KPIworks Server engine. System managers responsible for KPIworks are the intended users of KPIworks Administrator.

The features and operations that can be performed with KPIworks Administrator include adding, modifying, deleting, listing, printing database information, viewing logs and changing server configurations, etc.

A copy of KPIworks Administrator is included with the KPIworks Server software; it will be installed automatically when you install the server. The KPIworks Administrator program can be accessed from the server machine, or any administrator workstation by purchasing the KPIworks Administrator Kit. This document does not describe the use of the KPIworks client software modules; they are contained in a separate manual.

Chapter Three

Installing KPIworks Server

This chapter describes the **KPIworks** installation and setup process. It begins with general installation requirements and concludes with procedural information about installing the server software.

System Checks and Requirements

Before beginning the installation, it is important to determine the hardware and software requirements necessary for **KPIworks Server** to run efficiently. The following list contains decisions that must be considered before the software is installed:

Installation Considerations

System Requirements

One of:

- Microsoft Win2K (SP4+)
- Microsoft Win2K3
- Microsoft WinXP (SP1a+)

Applications

- *FirstPAGE* Server (optional)

Disk Space

- 200 MB

Display

- 800x600

Drivers

- TCP/IP
- MDAC V2.7SP1 (SP1+)

RAM

- 128 MB

Additional Requirements

- Determine the KPIworks Server Host Name you will be connecting to
- Determine which disk drive/directory your KPIworks server software will reside on.
- Determine the manufacturer and model for each marquee to be connected to the server.
- Determine the marquee address, and any TCP/IP addresses and ports required to connect to all marquees.
- Configure any serial ports to function with standard communications software for the platform you are using (i.e. HyperTerminal) and ensure any TCP/IP hosts can be reached from your server without the need of a proxy server.

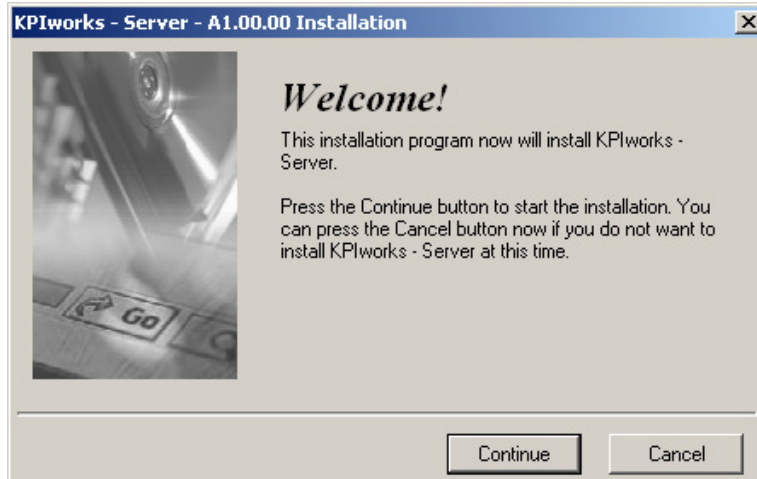
Performing the Installation

This section of the manual contains procedural information about the actual installation of **KPIworks Server**. It assumes that you have no prior knowledge of the software, but does require a basic knowledge of the Microsoft Windows environment.

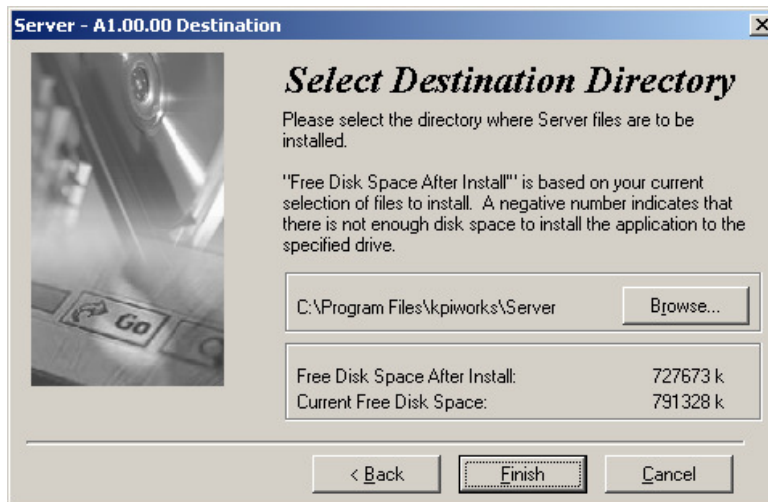
KPIworks Server Installation

To Install KPIworks Server:


1. Run SETUP.EXE from **KPIworks Server**.



2. You will be prompted for the installation destination directory:



3. Once complete click OK to complete the installation and restart your computer.

 The computer must be restarted before the **KPIworks Server** can be configured or operated. After restarting Windows, select **Start – Programs – KPIworks – Server – Administrator** to configure your KPIworks Server.

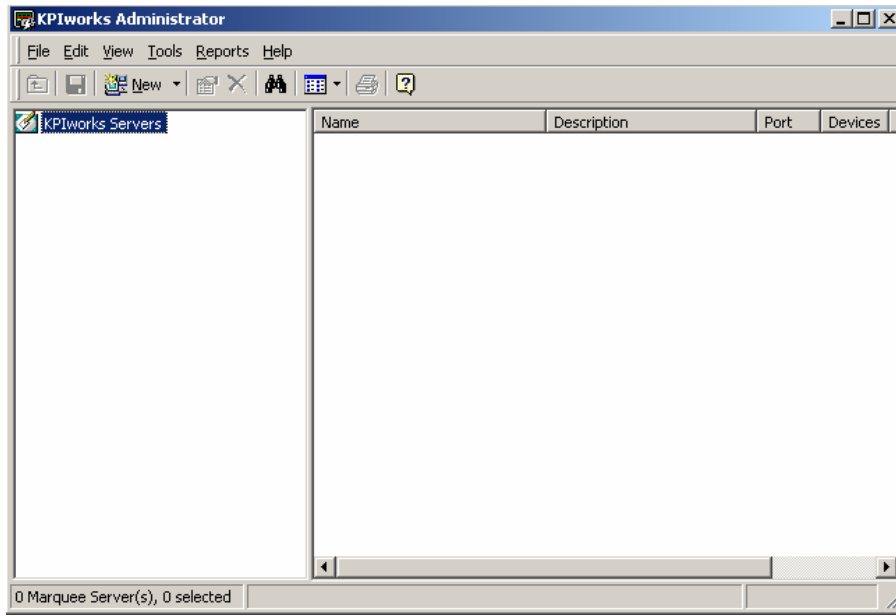
Starting KPIworks Server Administrator

KPIworks Administrator will automatically be installed with **KPIworks Server**.

To start *KPIworks Administrator*:

1. From the **Start** menu, select **Programs - KPIworks – Server – Administrator**.
The first time you start the Administrator the following screen appears:

KPIworks
Administrator



- ✎ There are two ways to navigate through these screens to enter information:
Use the mouse to click on the desired area.
Use the arrow keys to expand and navigate the tree view.
Tab to navigate down fields and the Shift + Tab keys to navigate up fields.

Chapter Four

Configuring KPIworks Administrator

Before you can begin using **KPIworks Administrator**, you must configure the various settings that control the interface to the server, and you must add at least one server to the administrator. The steps required include: adding a **KPIworks Server**, defining file paths, server communication options and licensing options.

This chapter contains information regarding the setup, configuration and maintenance of **KPIworks Administrator**.

Configuring the KPIworks Administrator

Once you have installed **KPIworks Administrator** on your machine, you must configure it to your desired needs. Once configured you must add your **KPIworks Server** to it before you can maintain the server.

Adding a KPIworks Server

KPIworks Server includes one Administrator license key that allows the addition of a single server. Additional licenses may be purchased that allow multiple servers to be added and maintained from your **KPIworks Server**.

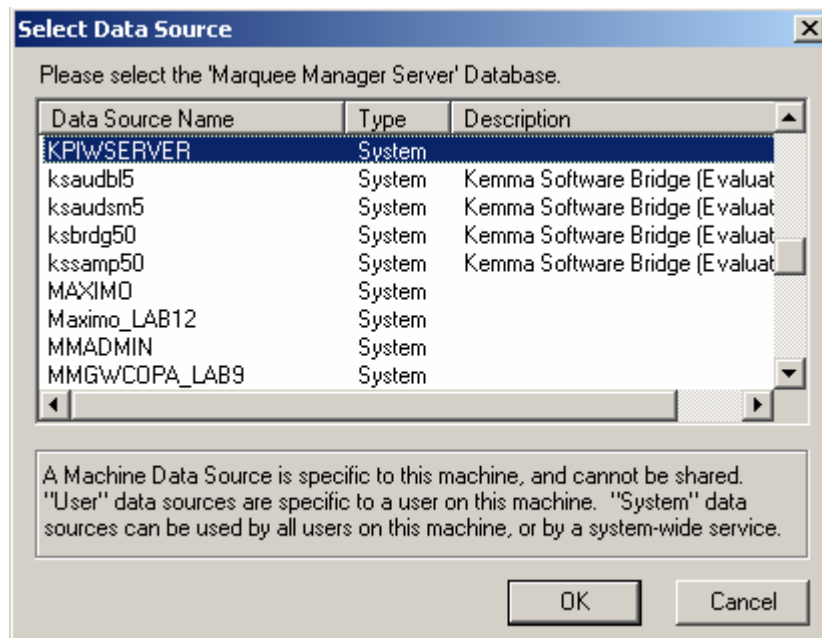
KPIworks Server also has a licensing requirement.

The Server configuration process includes a *Details* tab, which defines the connection from the KPIworks Administrator to the **KPIworks Server** allowing it to maintain a server, as well as a *Settings* tab that contains the server's configuration options, which tailor the operation of the server engine.

Configuring a KPIworks Server:

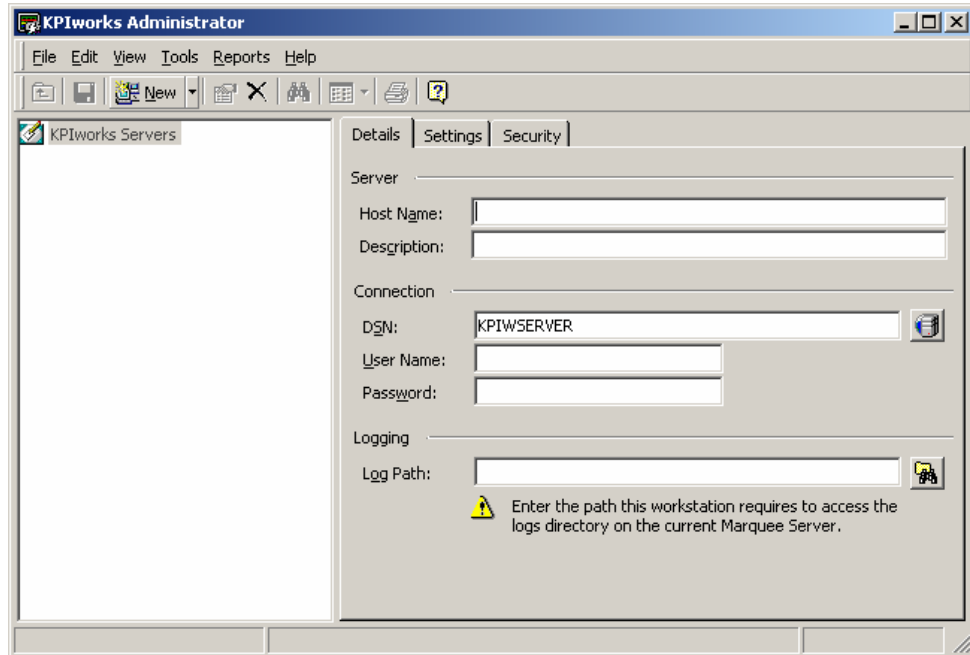
1. Select KPIworks Server in the tree view then click the New icon in the toolbar. You will be prompted to select an ODBC Machine Data Source. If you are configuring KPIworks Administrator supplied with KPIworks Server then the installation kit has already created this DSN. Simply select the KPIworks Server DSN from the Machine Data Source tab, and click OK.

 The KPIworks DSN is KPISERVER.






2. By default there is no username and password required for this DSN.

The following screen appears:

KPIworks
Server Details

The screenshot shows the KPIworks Administrator application window. The title bar reads "KPIworks Administrator". The menu bar includes "File", "Edit", "View", "Tools", "Reports", and "Help". The toolbar contains icons for "New", "Open", "Save", "Print", and "Help". The main window is divided into two panes. The left pane, titled "KPIworks Servers", is currently empty. The right pane has three tabs: "Details", "Settings", and "Security". The "Details" tab is active and contains the following fields:

- Server**
 - Host Name:
 - Description:
- Connection**
 - DSN: 
 - User Name:
 - Password:
- Logging**
 - Log Path: 
 -  Enter the path this workstation requires to access the logs directory on the current Marquee Server.

3. On the *Details* tab, enter the Server Host Name and Description. The Host Name must be a TCP/IP resolvable name which must be in your DNS server or your local host file and can be reached from the Administrator workstation. The description field can be any text field the administrator wishes to refer to the server as.
4. Enter the Log Path required to access the logs directory on the current **KPIworks Server**. In most cases, if the server is locally installed this path will be a drive letter based directory specification (e.g.: C:\Program Files\KPIworks\Server\Logs\). If the server being managed is not the local server then this path will most likely be a UNC path (\\server\share\directory), which provides access to the remote servers log directory. (e.g.: \\KPIworksserver1\mmserver\logs\).

KPIworks
Server
Settings

The screenshot shows the 'KPIworks Administrator' window with the 'Details' tab selected. The 'Server' section contains the following fields:

- Host Name: LAB10
- Description: test

The 'Connection' section contains:

- DSN: KPIWSERVER
- User Name: (empty)
- Password: (empty)

The 'Logging' section contains:

- Log Path: C:\Program Files\KPIworks\Server\LOGS

A warning icon is present below the Log Path field with the text: "Enter the path this workstation requires to access the logs directory on the Marquee Server 'LAB10'."

- After completing the details tab click on the *Settings* tab to configure the server options. If the server has never been configured before then the contents of the Settings tab will be defaults, if the server is already configured and operational then these fields will be filled with the current servers settings. Below is the default Settings tab form:

KPIworks
Server
Settings

The screenshot shows the 'KPIworks Administrator' window with the 'Settings' tab selected. The 'Server' section contains the following fields:

- TCP/IP Port: 8011
- License Key: (empty)

The 'Delay/Timeout' section contains:

- Clock Sync: 3600

The 'Logging' section contains:

- Log Days: 7
- Log Level: 0
- Maximum Log Space: 50 (MB)
- Log Path: (empty)

A warning icon is present below the Log Path field with the text: "Enter the path where the Marquee Server will store its log files. This path should reflect a directory on the server 'LAB10'."

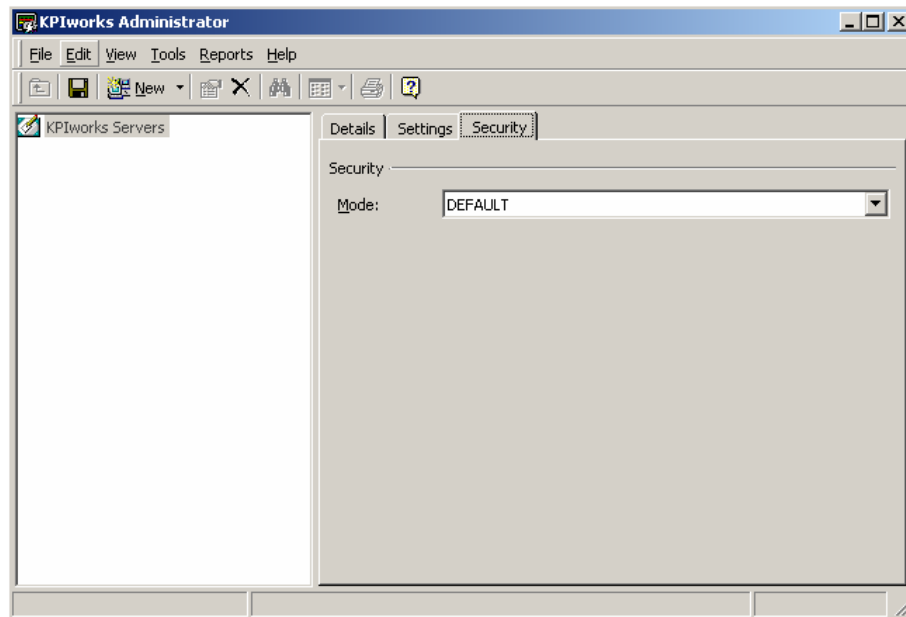
- TCP/IP Port: defaults to 8011. Enter in the valid KPIworks Server License Key.

7. Enter the *Clock Sync*: delay/timeout. Default is 3600 seconds (1 hour). This setting will automatically sync the internal marquee times to that of the Marquee server.
 - ✎ It is recommended that you run NTP (Network Time Protocol) on the Marquee Server machine to set the clock. This will ensure the accuracy of all marquee internal times as well.
8. Enter the number of days in the *Log Days* field that the log file will be kept before being purged. Default is 7 days. The *Log Level* field is for use at the request of Adaptive. In the event of any problems with the Gateway, Adaptive may request additional levels of logging to assist in problem solving.
9. To prevent the log files from consuming too much drive space, you can specify how much space to allot to the log file in the *Maximum Log Space* field. Default is 50 MB.

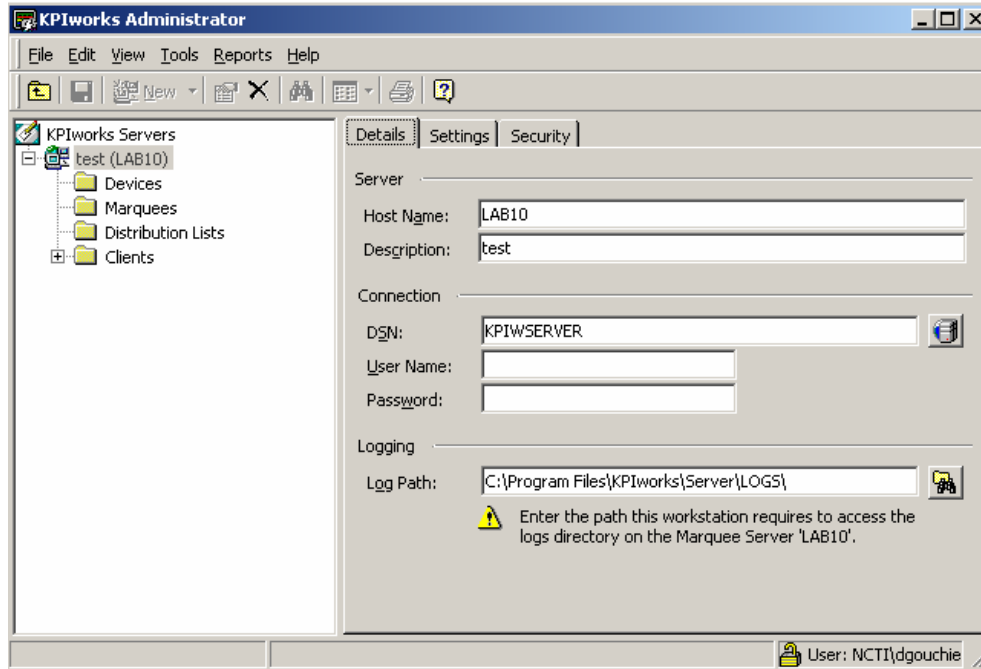
The Log Path field is a path specification, local to the actual **KPIworks Server**, which contains the directory where the **KPIworks Server** will store its log files.


Click on the *Security* tab to configure the desired level of security on the KPIworks Administrator.

KPIworks
Administrator
Security



10. Mode of *None* leaves security disabled. *Basic* mode enables Adaptive security and *Ford* Mode enables Ford specific security.
11. Click the **Save** icon in the toolbar to save your Server options. Your screen will look like this:

KPIworks
Server

-  When KPIworks Server is down (i.e. incorrect host name, cannot reach DNS server, LAN connection between the KPIworks Administrator machine and the KPIworks Server is down etc.) a red X shows by the root node of the server in the left tree view. Devices and Marquees may still be added while this connection is down.

Chapter Five

Using KPIworks Administrator

The **KPIworks Administrator** user interface is conveniently displayed in a tree view that when expanded shows a Devices folder that enables the user to add information about the devices that the server will use to communicate with the marquees.

It includes a Marquees folder and a Distribution List folder that serve as shortcuts to already configured Marquees and Distribution Lists, allowing the user to quickly locate this information without knowing the device that supports them.

This chapter contains procedural information about using **KPIworks Administrator**. It begins with an overview of the functionality of KPIworks Administrator and concludes with procedural information about performing everyday Administrator tasks.

Creating and Modifying Devices

The Devices folder allows you to add and maintain all devices and device related information such as device type and communication settings. Devices are the physical connections, which the server will utilize to connect to the various marquees. Devices must be configured before any marquees may be defined.

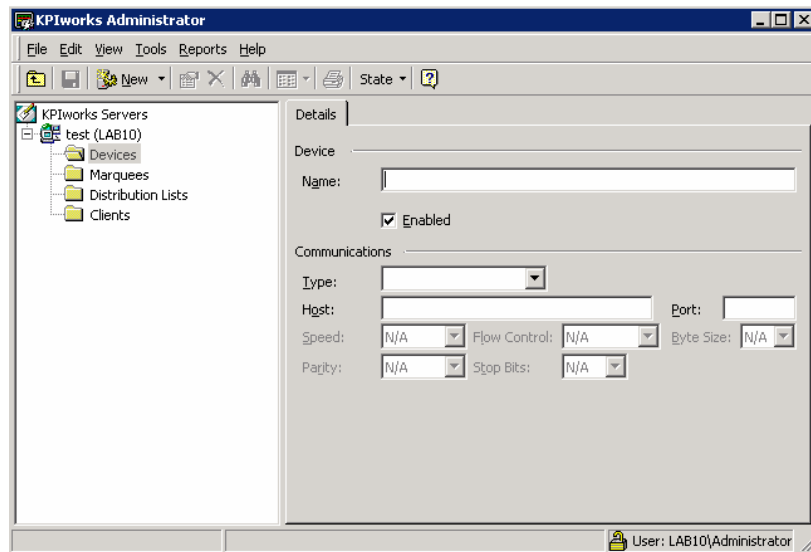
Adding a Device

To add a device to the database:

1. Right click on *Devices* in the tree view and select *New Device* or select the *Devices* folder and click the **New** icon in the toolbar.

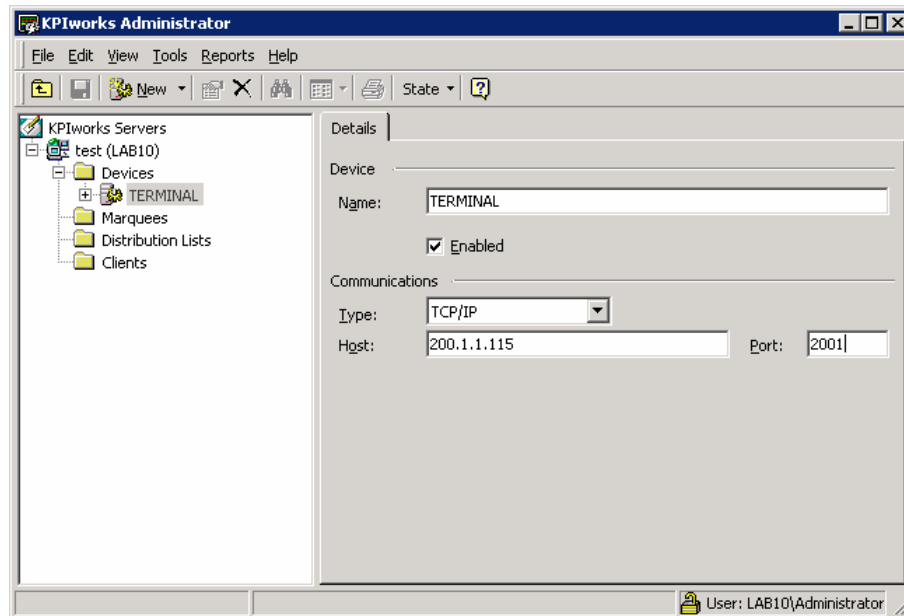
The following screen is displayed:

KPIworks
Server Devices



2. Enter a Device name in the *Name:* field. This is a logical name utilized by the administrator to refer to this physical device. For example a serial port may be called: SERIALCOM6 or a TCP/IP connection: IPSERVER10
3. The *Enabled* field allows you to disable or enable individual marquees to make firmware changes or for testing purposes.
4. Select the type of device you are using from the *Type:* drop down list. The type of device can be TCP/IP for an Internet connection, Serial connection (by serial cable), or *FirstPAGE* for RF connections.
5. For Device Type of TCP/IP you must specify the host name or IP address and port used to connect to the terminal server or LAN.
6. For Device Type of Serial, you must specify the Port that the device is connected to, as well as port speed, flow control, byte size, parity and stop bits. The Flow Control option defines the way that the devices throttle the flow of send and receive data. Select *Hardware* to use the devices hardware flow control method or select *Software* to use the devices software flow control method. The default value for this field is *N/A*.
7. For Device Type of *FirstPAGE*, you must specify the Host and Port of your *FirstPAGE* Server as well as a destination to send the message to.

- Click the **Save** icon to save your new Device. The Device has now been added to the Devices database and is ready to have one or more Marquees assigned to it.

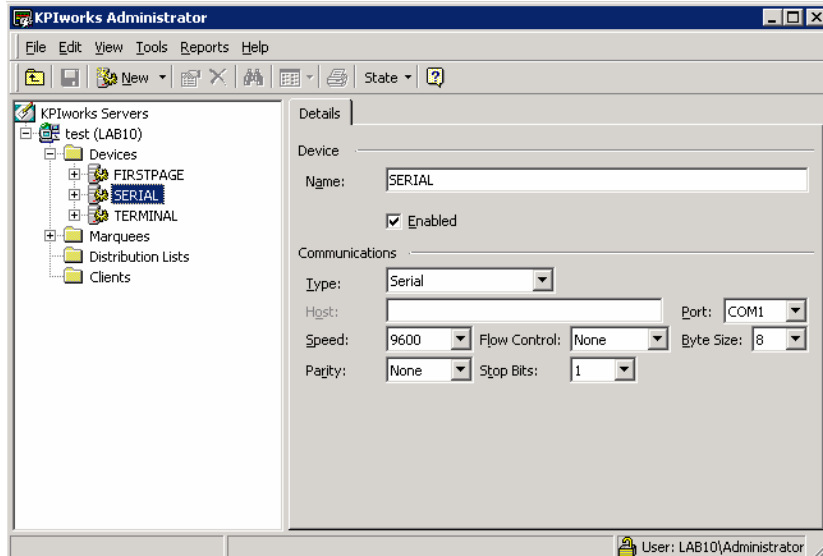




Viewing and Modifying Devices

To view or modify device information:

1. On the *Devices* folder, select a device from the list and click the **Edit Device** icon in the toolbar.

Viewing or
modifying
device
information




2. The configuration settings and information for the selected device are displayed. Click on a field to edit the device information.
3. You may disable the device by selecting the Disable icon . The device will then appear in the left pane with a yellow X by it. This feature is beneficial if the device needs maintenance and needs to be disabled for a period of time. To enable, simply select the device and click the Enable Item icon in the toolbar .
4. Click the **Save** icon in the toolbar to save any changes.

Deleting a Device

You will not be able to delete a device if a Marquee is still assigned to it. Otherwise, device entries can be deleted entirely using the KPIworks Administrator application.

To delete a device:

1. Select the device you want to delete either from the tree view or the device list on the left pane of the screen.
 2. Click the **Delete** icon in the toolbar to remove the device from the list.
 3. Click **Yes** to confirm the deletion. The device will now be removed from the list.
-  Once a device has been deleted, it cannot be retrieved. The only way to restore it is by adding it back into KPIworks Administrator (see the "Adding a Device" section in this chapter for more details).

Creating and Modifying Marquees

The Marquees folder contains information pertaining to marquees, and their configuration settings. By selecting the marquees folder it allows you to add marquees to the system and modify their settings.

Adding a Marquee

Before using **KPIworks**, you must add one or more marquees to a device. This includes the name, manufacturer, model, address etc.

To add a marquee to the database:




1. Expand the *Devices* folder, and select the *Marquees* folder. Right click and select **New Marquee** or select the *Marquees* folder and click the **New** button on the toolbar. The following screen is displayed:

Marquee
Details Tab


The screenshot shows the 'KPIworks Administrator' application window. The left-hand pane displays a tree view of the system structure, with 'test (LAB10)' expanded to show 'Devices', 'Marquees', 'BIGDOT26', 'Distribution Lists', and 'Clients'. The 'Marquees' folder is selected. The right-hand pane is titled 'Details' and contains the following fields:

- Name:** A text input field.
- Description:** A text input field.
- Device:** A dropdown menu.
- State:** A dropdown menu currently set to 'Enabled'.
- Type:** A dropdown menu.
- Manufacturer:** A dropdown menu.
- Model:** A dropdown menu.
- Settings:**
 - Address:** A text input field.
 - Queue Size:** A numeric input field set to 10.
 - Priority Threshold:** A dropdown menu set to 9.

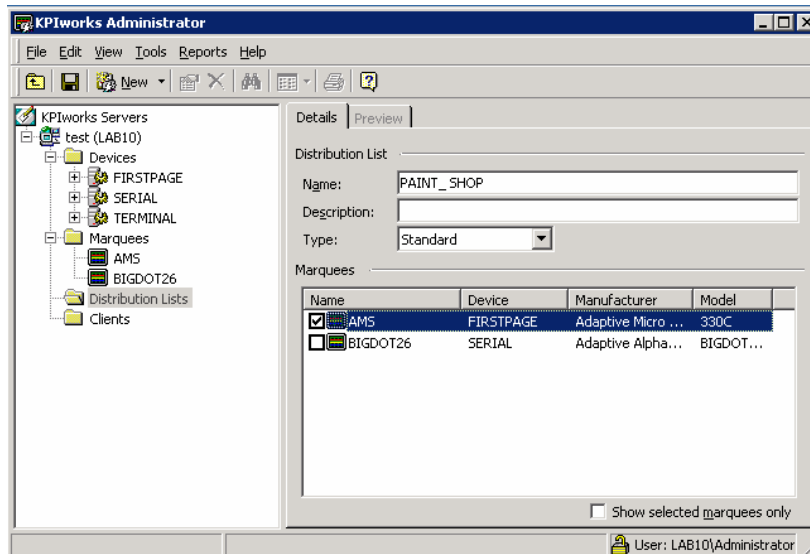
The status bar at the bottom right indicates 'User: LAB10\Administrator'.

2. On the *Details* tab, enter the Marquee Name and description in the *Name:* and *Description:* fields. The name will appear in **KPIworks Client** exactly as it is typed in this field.
 3. Select the *Device* that this marquee will be connected to.
 4. The *State* field allows you to disable, enable or set individual marquees to test to make firmware changes or for testing purposes. Marquees will be displayed in the tree view with the appropriate icon:  for a disabled marquee and  for a marquee that is in test mode.
 5. Select the Manufacturer and Model of marquee from the *Manufacturer:* and *Model:* drop down lists.
-  See **Appendix A 'Sign Properties'** for a complete list of supported manufacturers and models.
6. Enter the marquee address in the *Address:* field. The following table illustrates the required address values for each type of Manufacturer:

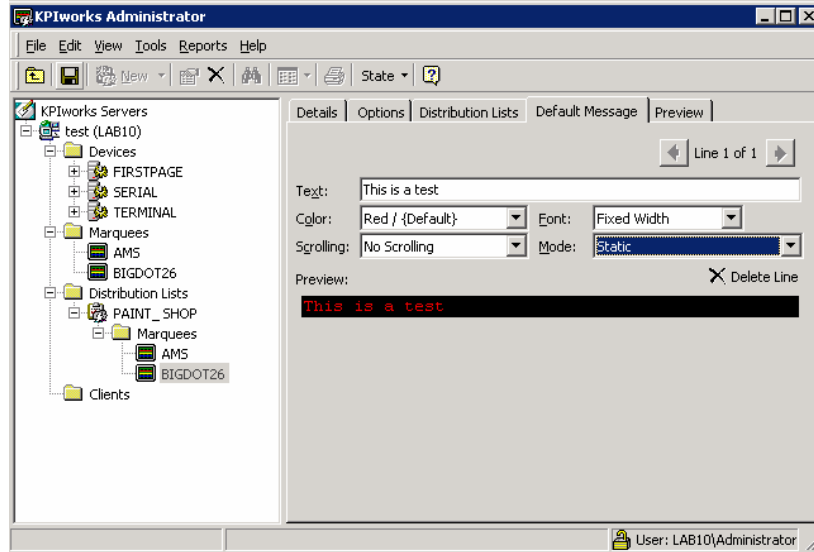
Manufacturer	Address format
Adaptive Alpha Version 2	2-digit hex from the display. Range = 00-FF
Adaptive Micro Systems	2-digit hex from the display. Range = 00-FF
NETCON Native Unit	Fixed length 4-character address field. First two bytes represent group, second two bytes represent unit. Valid values 00-FF. All characters in uppercase.

7. Select *Queue Size*: for the marquee selected. Queue size determines the number of live messages that will be displayed on the marquee at one time. Default queue size is 10 messages for all.
8. Select the *Priority Threshold* for this sign. The Priority Threshold determines the order that messages sent to the sign will be displayed. High priority messages are a threshold of one and low priority message will be a threshold of nine. Default Priority Threshold is set to nine.
9. For example, if your marquee has a priority threshold set to three, all messages with a priority of three or higher (and only those messages) will be displayed. When they have been acknowledged and are no longer being displayed, any other messages with a lower priority will then start displaying on the marquee.
 -  *Priority Threshold* is a licensed feature that will only be enabled if purchased.
10. On the *Distribution Lists* tab, select the distribution list that you wish to add the marquee to.

Distribution Lists Tab

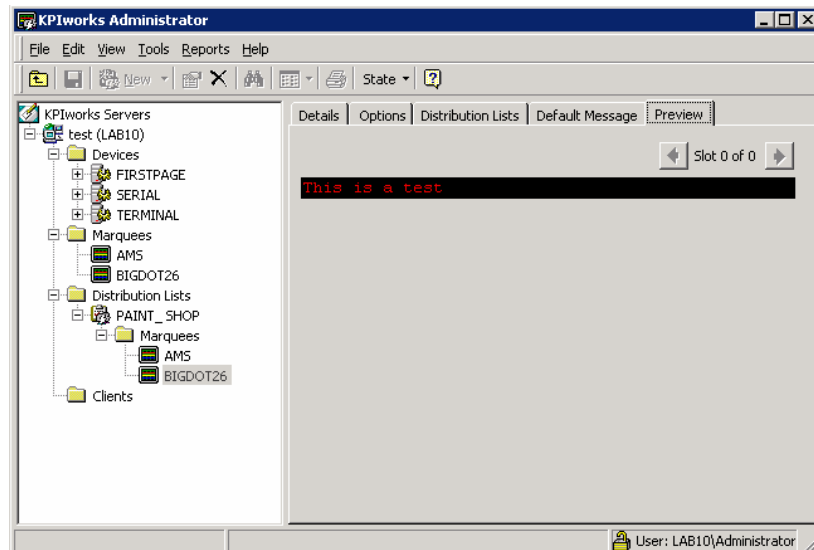


11. On the *Default Message* tab, enter in the message that will be displayed when no active messages are being sent. This screen will change to reflect the number of available lines and attributes depending on the Manufacturer and Model selected.

Default
Message Tab

12. Select the message attributes for color, font, scrolling and mode.
13. KPIworks allows you to configure multiple colors and modes per line. E.g. <COL-RED>Marquee<COL-GRN>Message entered in the Text field would display the word Marquee in red and the work Message in green.
14. KPIworks Server allows you to configure additional insertion tags to the default message. The tags available at this time are <TIME> and <DATE>. The insertion tags must be included in brackets and must be all upper case.
15. The *Preview* tab displays what is currently being played on the display; any slots that have been entered with KPIworks Client.

Preview Tab



Cloning a Marquee

If you have many marquees that must be added to the Administrator, KPIworks Administrator allows you to clone marquees. This eases configuration by cloning all details/attributes of a particular marquee.

To clone a marquee:

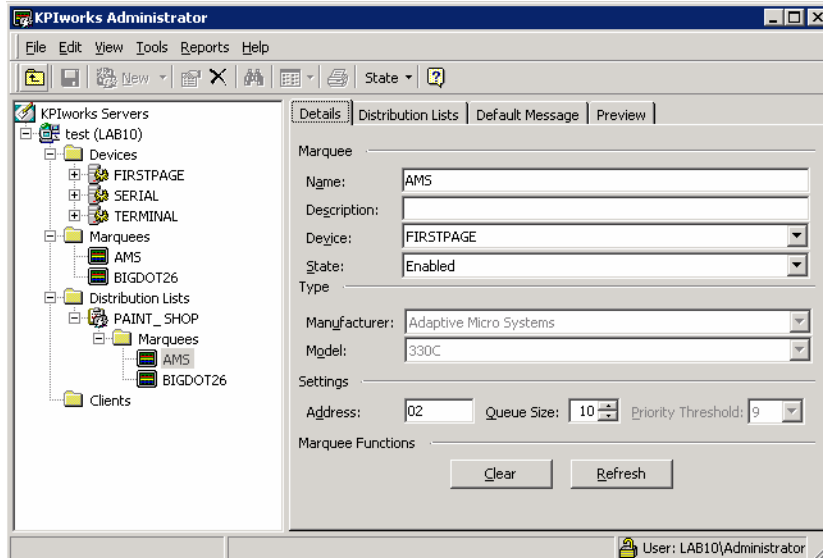
1. Select the marquee you wish to clone. Right click and select **Clone Marquee**.
2. A new configuration screen will be displayed. The only information that is not cloned is the Name, so no duplicates are created, the Device, allowing the user to select the device they wish the new marquee to be connected to, and the address. All other information, including the default message and attributes are cloned as well.
3. Click the **Save** icon to save your new cloned marquee.




Viewing and Modifying Marquees



To view or modify marquee information:

1. On the *Marquees* folder, select a marquee from the list.

Viewing and
Modifying
Marquees



2. The configuration settings and information for the selected marquee are displayed.
3. Click on a field to edit the marquee information.
4. You may disable the marquee or put it in test mode by selecting the **State** icon in the toolbar. The marquee will then appear in the left pane with a yellow X  by it to show it is disabled, or a yellow T  to show it is in test mode. This feature is beneficial if the marquee needs firmware installed or for testing purposes and needs to be disabled for a period of time. To enable, select the marquee and click the Enable Item icon in the toolbar .
5. Click the **Save** icon in the toolbar to save any changes.



-  The **Clear** button allows the marquee to be cleared of all messages, including those sent through KPIworks Client. The **Refresh** button allows the marquee to be refreshed, maintaining all current messages that are currently displayed or in the queue to be displayed.
-  Once the information has been saved, you cannot revert to the old information. The only way to get it back is by changing it again.

Deleting a Marquee

Marquees can be deleted through the Device in the tree view or by using the shortcut folder called Marquees that lists all configured Marquees and is intended for a quick access to Marquee information.

To delete a Marquee:

1. Select the Marquee you want to delete. The Marquee information should then appear on the right-hand side of the screen.
2. Click the **Delete** icon to remove the marquee from the database.

-  Once a Marquee has been deleted, it cannot be retrieved. The only way to retrieve it is by adding it back into the database.
-  The Marquee Client must be refreshed after any changes are made in the Marquee Administrator. When deleted, the marquee will be cleared of this message.

Creating Distribution Lists

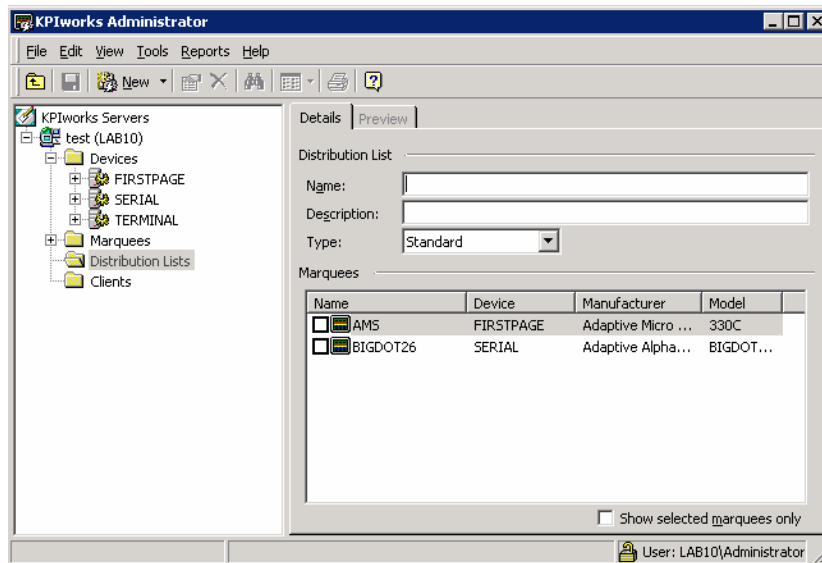
The *Distribution Lists* folder allows users to add configured marquees to distribution lists, allowing the same message to be sent to multiple marquees at the same time. KPIworks Client applications provide the ability to compose messages and send them to a marquee's distribution list.

Adding a Distribution List

To add a distribution list:

1. Click on the *Distribution Lists* folder, right click and select **New Distribution Lists** or click the **New** icon in the toolbar. The following screen is displayed:

Creating
Distribution
Lists



2. Enter in the Name and Description of the Distribution List.
3. Select which Type of Distribution List to create. Type *Standard* includes all Adaptive Micro marquees that are not cell-based.
4. From the list of Marquees, select the marquees you would like to add to this distribution list.
5. You can filter out the marquees list by selecting the Show selected marquees only button.
6. Click on the *Preview* tab to display what is currently being displayed on the marquees in that distribution list.
7. Click the **Save** icon to save distribution list details.

Clearing Transactions

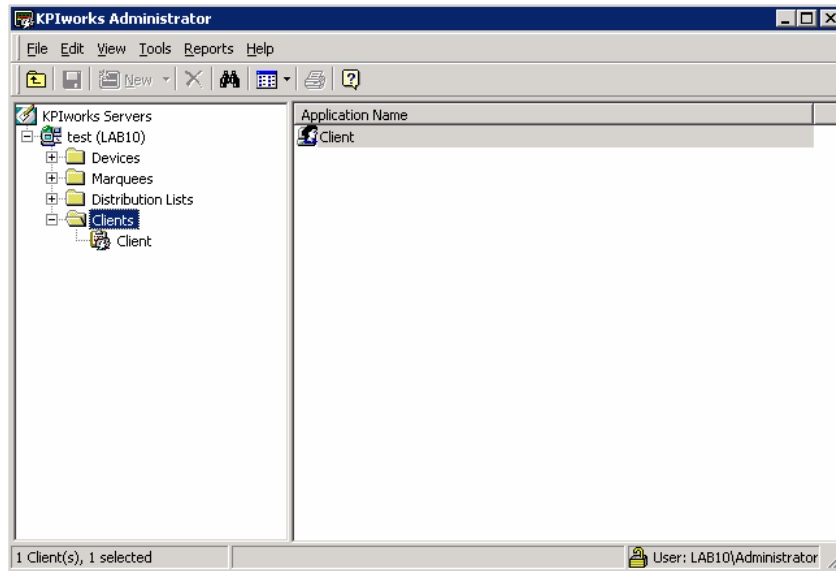
The *Clients* folder allows users to clear transactions initiated from various clients such as KPIworks Client or any gateway applications that are utilizing the server. This allows the administrator to clear any transactions should the client or gateways lose connection with the KPIworks Server.

Clearing a Client Transaction

To clear a transaction:

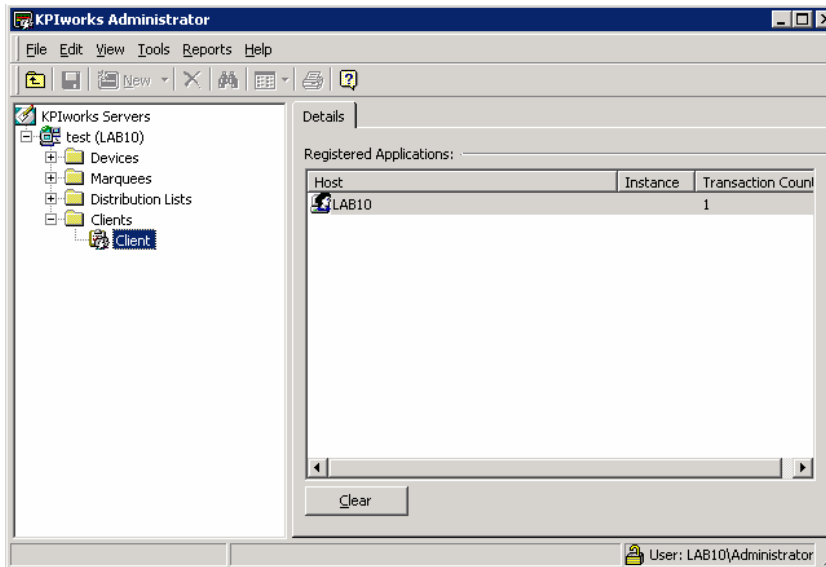
1. Click on the *Clients* folder. A list of current transactions for each client is displayed in the right pane:

Clearing client transactions



2. Select a Client from the left tree view to see the details of each transaction. The Transaction Count displays the total number of transactions currently active on each client.

Clearing client transactions



3. Click the Clear button to clear all transactions on the selected Client, displaying the default message for that Client.

Chapter Six

Configuring Options and Viewing the Logs

The **KPIworks Server** allows you to configure various options such as data entry details and marquee attribute defaults, as well as setting options for the server should it be unavailable at startup.

Logs are also available for viewing as a means of troubleshooting, providing details on any problems or errors.

Configuring Options

The *Options* menu allows users to set KPIworks Server details.

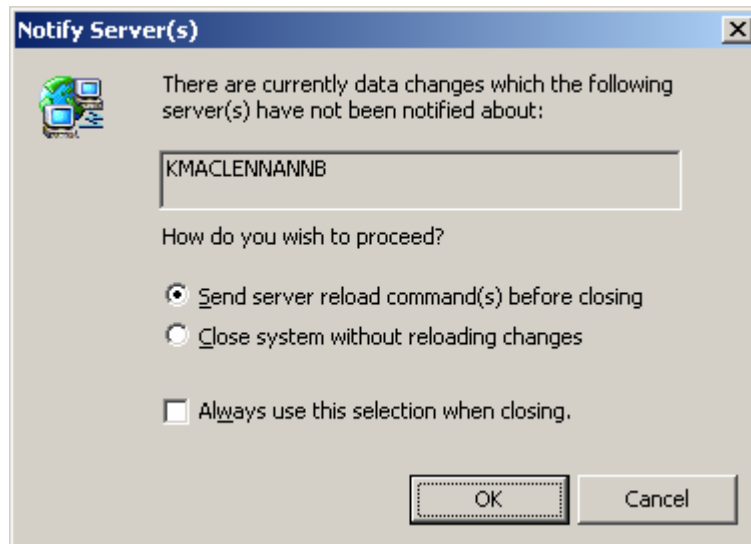
To configure Server options:

1. Click the **Tools** menu then select **Options**. The following screen is displayed:

Configuring
Options

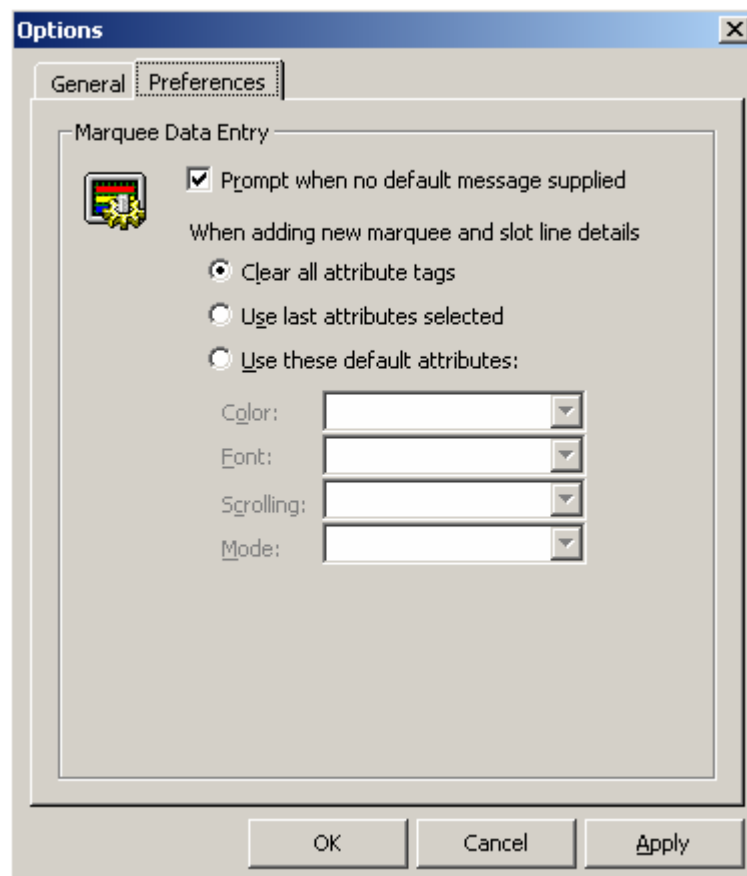
The screenshot shows the 'Options' dialog box with the 'General' tab selected. The dialog is titled 'Options' and has a close button (X) in the top right corner. It is divided into three sections: 'kpiworks Servers Database', 'Licensing', and 'Server Reload'.
 - The 'kpiworks Servers Database' section contains three input fields: 'Data Source:' with the value 'MMADMIN', 'User Name:' with the value 'admin', and 'Password:' which is empty.
 - The 'Licensing' section contains a 'License Key:' input field with the value '00000000000000000000000000000000'.
 - The 'Server Reload' section contains a label 'When adding, editing, or deleting items:' followed by two radio button options: 'Perform a Server Reload with every change.' (which is selected) and 'Only perform a Server Reload when requested.'
 At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

2. The *General* options display the Server Data Source as well as the license key. This key determines the number of servers that can be configured.
3. KPIworks Server gives you the option to reload the server with any additions, edits or deletions automatically or when requested by the user. Select if you would like the server to automatically reload after every change or to perform the reload only when requested. If you choose to reload after every change, the reload will take place when the Save button is clicked. If you choose to reload only when requested, you will be prompted that there are data changes that the server needs to notified about and have the option to either send the reload before closing or close the system without reloading the changes:



4. Click on the *Preferences* tab to control the KPIworks Administrator data entry preferences. You may control prompting in the event no default was supplied, and you may control the default attribute handling for marquee attributes.

Configuring
Preferences



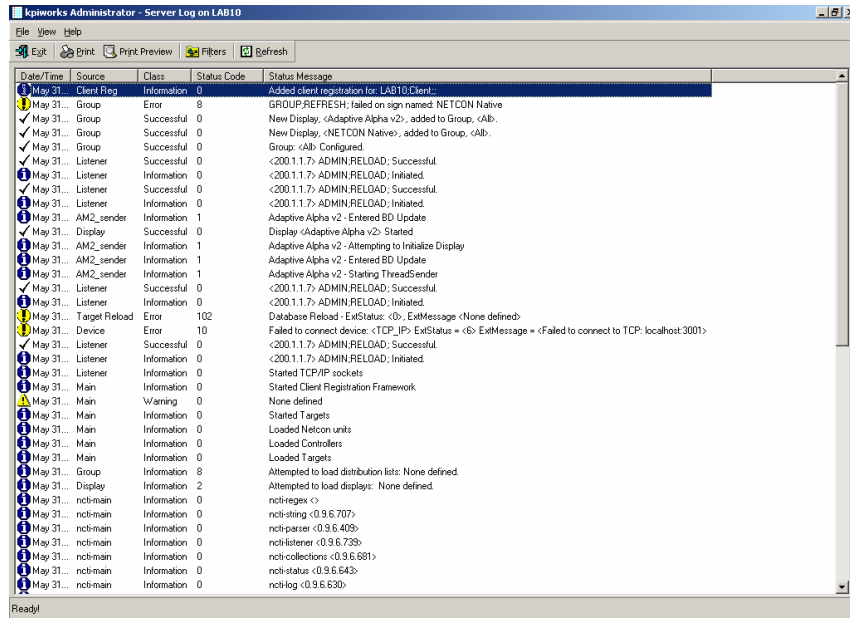
Viewing the Log File

KPIworks Administrator allows you to view the log files associated with the various components of the software. The log files contain an accurate history of every transaction and modification made to the database. Log files are important because they ensure the integrity of the data and provide a means of data recovery.

To View the Log File:

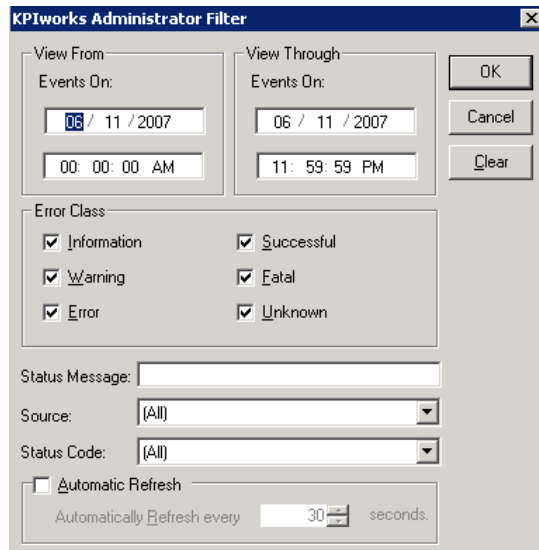
1. Select **View Log** option from the **View** menu to display the following screen:

Viewing the log files



2. Double-click the log entry for further information.
3. Click the **Filters** button and choose viewing options to display only the desired information.

Filtering log information




4. The *Events On:* field defaults to the current day.

The *Status Message* field can be used to search for a portion of the message in the log.

Only certain characters may be used in this field. The common search characters are as follows:

Character	Match made	Example
?	Any single character	Text in the log is ABC, DBC and XYZ. If ?BC is used in the <i>Status Message</i> field, only ABC and DBC will be returned.
*	Zero or more characters	*Initiated* in the <i>Status Message</i> field would return all log items with the word 'Initiated'
#	Any single digit (0-9)	Text in the log is Device1, Device5, Device8, Device10. Keying in Device# in the <i>Status Message</i> field, will return Device1, Device5, and Device8.

 When matching the special characters left bracket ([), question mark (?), number sign (#), and asterisk (*), enclose them in brackets.
Ex. to find all log items that start with [you need to enter in [[]* in the *Status Message* field.

5. Select the *Automatic Refresh* option to automatically refresh the log file based on the seconds specified.

Chapter Seven

Configuring and Using Security

The **KPIworks Server** comes equipped with security options that allow the administrator to configure users with limited security access. It is conveniently displayed in the tree view under the *Tools* folder when enabled.

Enabling and Configuring Security

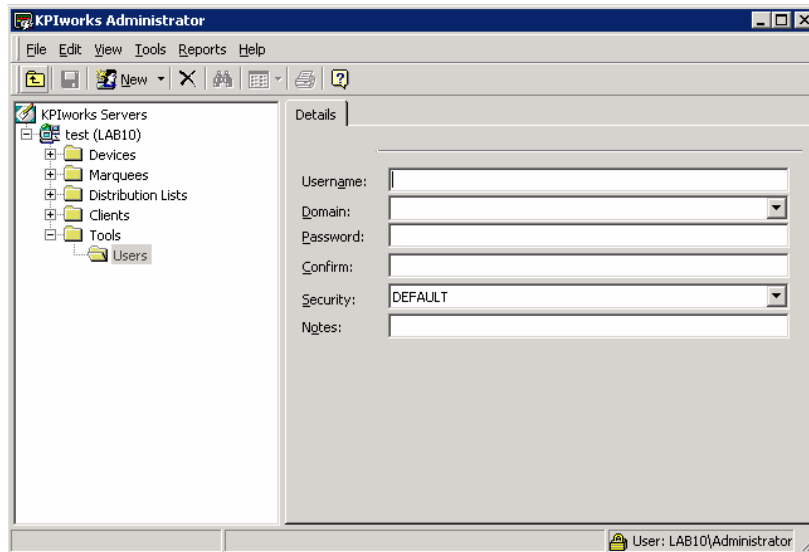
If security is enabled when the KPIworks Server is configured, either by selecting Basic or Ford mode security (specific only to Ford users), a *Users* folder appears under the *Tools* section of the tree view.

The *Users* folder allows the administrator to add destinations with limited access to various user applications.

Adding a User to Security

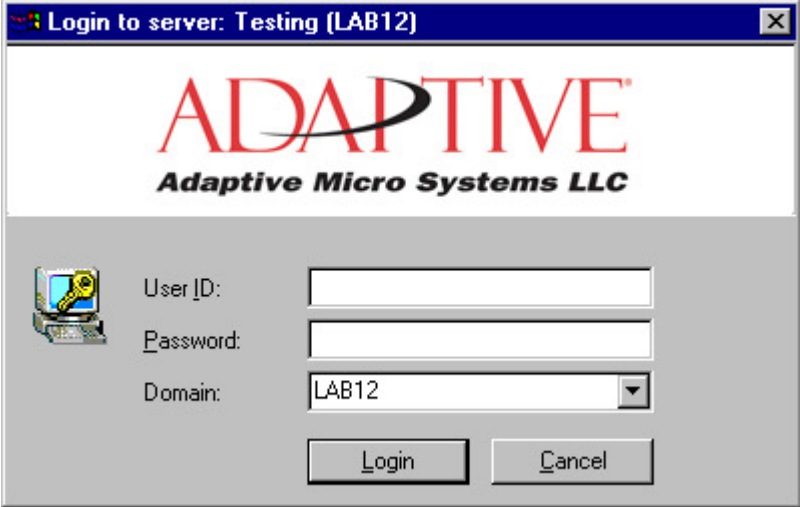
1. Click on the *Tools* folder then select the *Users* folder. Right click and select **New User** or click the **New** icon in the toolbar. The following screen is displayed:

Creating Users
in security
mode



2. Enter the *Username* for this account. This must be the Windows login username.
 - ✎ The first user entered must be an administrator with Admin security. The last user removed must also be an Admin.
3. Select the *Domain* from the drop down list of available domains.
4. Enter a *Password* for this username then confirm password.
5. Select the level of security this user will have. Admin access gives users access to both KPIworks Administrator and KPIworks Client. Default access gives users access only to KPIworks Client.
6. Enter any additional notes on the user in the *Notes* field.
7. You will now be prompted for a User ID/password and a valid Domain name before you can access KPIworks Administrator.

KPIworks
Administrator
Security Login



The image shows a Windows-style login dialog box titled "Login to server: Testing (LAB12)". At the top, the Adaptive Micro Systems LLC logo is displayed in red and black. Below the logo, there is a small icon of a computer monitor with a key. To the right of the icon are three input fields: "User ID:" (a text box), "Password:" (a text box), and "Domain:" (a dropdown menu currently showing "LAB12"). At the bottom of the dialog are two buttons: "Login" and "Cancel".

Chapter Eight

Running the Database Converter


The **KPIworks Server** comes equipped with a database converter that allows the administrator to upgrade a database if they are running an older version of the gateway.

Upgrading the Database

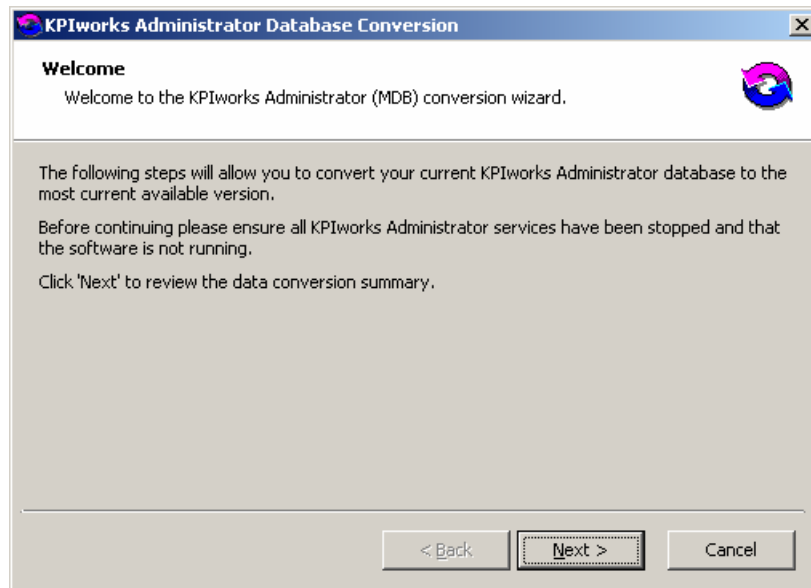
If upgrading from a previous version KPIworks Server, the administrator and server databases must both be converted to run with the new version.

Running the Convert Option

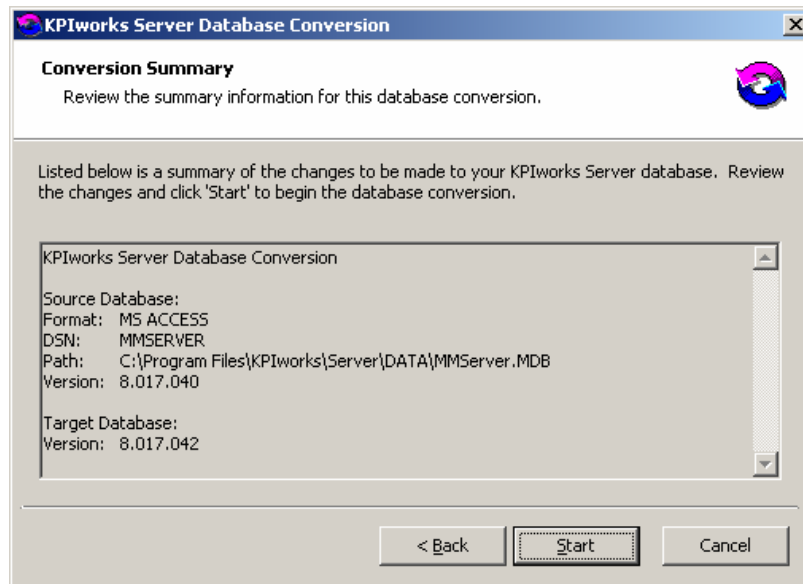
1. From the Start menu, select Programs – KPIworks Server – Database Conversion. This will launch the Conversion Wizard.

 Be sure to stop the KPIworks Server service via Control Panel before running the database conversion.

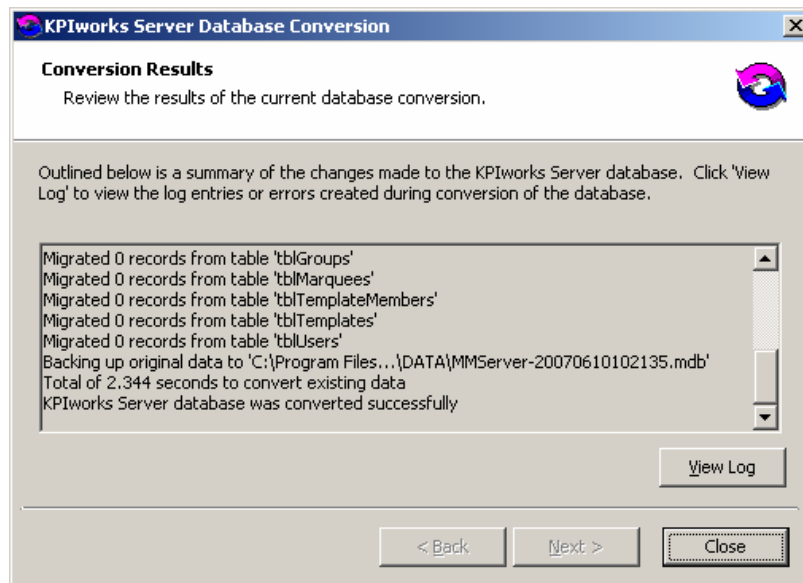
Database
Conversion
Wizard



2. The Conversion Wizard will display a summary of changes that will be made to your *FirstPAGE* Gateway for OPC database, including the current version that is running and the target database.

Database
Conversion
Wizard

3. Click **Start** to run the converter. Conversion results will then be displayed.

Database
Conversion
Wizard

Chapter Nine

Technical Assistance

Support Contracts

You may purchase a support contract for *KPIworks* Server. Various levels of support are available. View the KPIworks web site (www.KPIworks.com/support <<http://www.KPIworks.com/support>>) and submit an inquiry for the product you are using.

For all support related issues, please provide the version of the software that you are running. This may be verified by browsing your Start menu, Programs, then selecting the application in question (i.e. *KPIworks\Server*), then selecting Version Info. This will provide the install kit version that is currently running.

Help Desk

To reach our help desk please use one of the following methods:

Telephone: +1.800.558.7022 x519

Fax: +1.414.357.2029

Web: www.KPIworks.com <<http://www.KPIworks.com/support>> - Customer Care

E-Mail: support@KPIworks.com <<mailto:support@KPIworks.com>>

Please have your version information and support contract or product license key ready before calling or include it in your correspondence. Support is free for product trials and for the first 30 days of product ownership. To view your product version select Start – Programs – *KPIworks* – Server – Version Info.

Glossary

Administrator

Typically a GUI application, this component facilitates configuration and monitoring of a server engine. If changes are made to the server configuration the administrator notifies the engine to reload its running configuration either automatically or on user demand. An example of an administrator component is *FirstPAGE* Administrator.

This administrator allows you to maintain the *FirstPAGE* server's engine configuration.

Administrator Kit

An administrator kit contains the product's administration component only. After installing this kit on a workstation you may utilize any of the features of the Administrator component.

Client

A client component utilizes the facilities of a standard NETCON server. Typically a GUI application, this component provides a user-friendly interface of the available services offered by the server engine. An example of a client tool would be *FirstPAGE* Client, which presents the user with a list of known messaging destinations and allows them to send messages to one or more destinations.

Cycle

The time period defined for the display of Controller 980 templates, allowing the display of multiple screen templates in sequence.

Device

A KPIworks Server device is a name assigned to a physical connection point on the server, which will be used to establish a connection with a marquee.

Distribution List

A KPIworks Server distribution list is a collection of marquees, which can be sent a message with a single transaction. Similar to an e-mail distribution list, a client which initiates a transaction with a distribution list will automatically send the same message to all associated marquees.

DSN

A DSN, Data Source Name, is the name assigned to an ODBC driver and configuration information that allows an ODBC enabled application to connect to a data source.

Engine

An engine component implements a unified interface to a set of common, related protocols. The engine provides services to clients and gateways such that a common interface may be used to manipulate many different types of devices. Engines are

administered via Administrator components and are utilized by clients, gateways or use written components.

Marquee

A sign display that serves as a visualization communication tool, providing the means to display time, date and message text such as production counts, and what areas of a plant are experiencing problems.

ODBC

The ODBC protocol is an implementation of the Microsoft 'Open Database Connectivity'. The ODBC API is utilized to access the KPIworks configuration database.

Priority Threshold

The importance or priority that can be placed on each message sent to the marquee sign, with one being the highest priority and nine being the lowest priority.

Queue Size

The number of live messages that will be displayed on the marquee at one time.

Server Kit

A server kit typically contains the server engine and administrator components. In some cases a client component is also included with this kit. The server kit is usually installed on a centralized host and is utilized by one or more clients or gateways. An example of a server kit is *FirstPAGE* Server. This kit contains the *FirstPAGE* engine, administrator and client.

Stack Light

Stacked lights typically used to display colors in a vertical grid pattern from one to five lights high. They may be used to show if a station is experiencing a problem then turn a light on to alert personnel.

Template

A user formatted guide or page of configured marquees, allowing you to display a page at any given time without the need to customize each marquee.

APPENDIX A – Sign Properties

ADAPTIVE ALPHA VERSION 2 *

Model	Color	Font	Scrolling	Flashing	Notes
BIGDOT 13Char	Tri-color	Double Height	✓	✓	Supports Rollup
BIGDOT 26Char	Tri-color	Small, Fixed Width, Bold	✓	✓	Supports Rollup

Adaptive Micro Systems*

Model	Color	Font	Scrolling	Flashing	Notes
ALL	Tri-color	Small, Bold, Fixed Width	✓	✓	
Beta-Brite	Tri-color	Small, Bold, Fixed Width	✓	✓	
BIGDOT	Tri-color	Small, Bold, Fixed Width	✓	✓	
BIGDOT_ 26Char	Tri-color	Small, Bold, Fixed Width	✓	✓	
PPD		Small, Bold, Fixed Width	✓	✓	Red and green models
215	Tri-color	Small, Bold, Fixed Width	✓	✓	
215C	Tri-color	Small, Bold, Fixed Width	✓	✓	
320C	Tri-color	Small, Bold, Fixed Width	✓	✓	
330C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4080C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4120C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4120R	Red	Small, Bold, Fixed Width	✓	✓	
4160C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4160R	Red	Small, Bold, Fixed Width	✓	✓	
4200C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4200R	Red	Small, Bold, Fixed Width	✓	✓	
4240C	Tri-color	Small, Bold, Fixed Width	✓	✓	
4240R	Red	Small, Bold, Fixed Width	✓	✓	
7120	Tri-color	Small, Bold, Fixed	✓	✓	

		Width			
7160	Tri-color	Small, Bold, Fixed Width	✓	✓	
7200	Tri-color	Small, Bold, Fixed Width	✓	✓	
7200_4Line	Tri-color	Small Caps	✓	✓	
9120	Tri-color	Small, Bold, Fixed Width	✓	✓	
9160	Tri-color	Small, Bold, Fixed Width	✓	✓	
9200	Tri-color	Small, Bold, Fixed Width	✓	✓	
9240	Tri-color	Small, Bold, Fixed Width	✓	✓	

NETCON Native Unit *

Model	Color	Font	Scrolling	Flashing	Notes
Clock	N/A	N/A	x	x	Displays time only
Counter	Red	Fixed Width	x	x	- Numeric only - Max. 8 digits - # of Characters can be set on the Options tab in Marquee Administrator
Marquee	Multi-Color	Fixed Width	✓	✓	- Supports Rollup - # of Lines and Characters can be set on the Options tab in Marquee Administrator
Sounder	N/A	N/A	N/A	N/A	255 Tunes

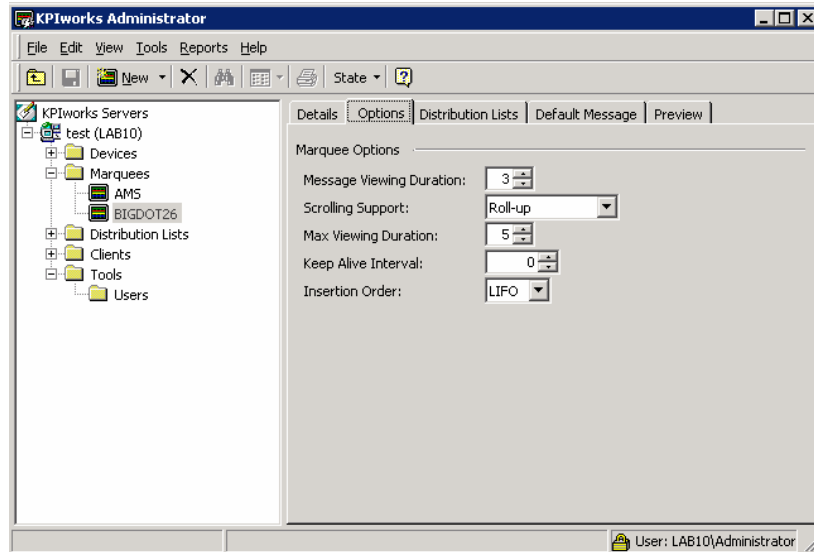
APPENDIX B – Additional Options for Various Marquee Models

Adaptive Alpha Version 2 Models

The Adaptive Alpha Version 2 BigDot includes additional options that are not available on other marquee models. It allows the user to select how long to display a message as well as scrolling options.

1. The *Options* tab allows you to configure marquee options.

Creating Adaptive Alpha Version 2 model Marquees



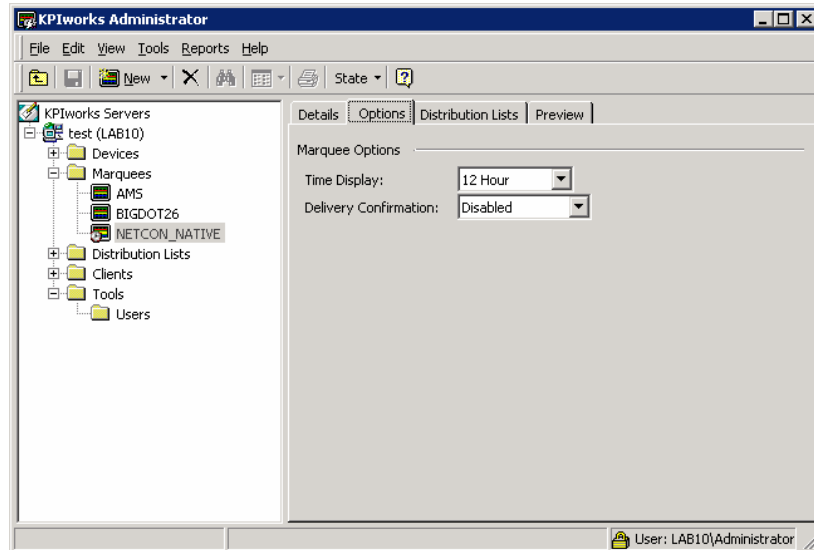
2. Select the number of seconds you wish to display the message from the *Message Viewing Duration* drop-down. Default is 3 seconds.
3. Select the *Scrolling Support* option that you wish to use for this marquee. Available options include Enabled, Disabled and Roll-up.
4. *Max Viewing Duration* indicates the maximum time in seconds the message will be displayed.
5. The *Keep Alive Interval* ensures a packet is sent to the marquee after the specified seconds. If all messages are cleared to the marquee, it will send a keep alive packet so the marquee does not disconnect. If set to 0, no packet will be sent.

NETCON Native Unit Models

The NETCON Native Unit includes additional options that are not available on other marquee models.

1. The *Options* tab allows you to configure marquee options.

Creating
NETCON
Native Unit
model
Marquees



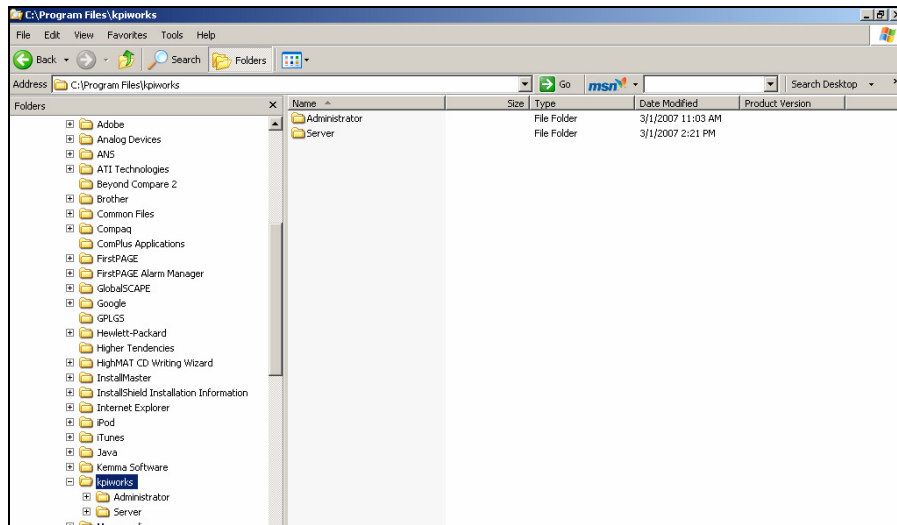
2. Select if you want the marquee to display in 12 or 24 hours from the *Time Display* drop-down.
3. The *Delivery Confirmation* field allows you to enable or disable confirmation that the message was delivered to the appropriate display. If delivery was unsuccessful, the logs will indicate that the delivery failed.

APPENDIX C – Installing KPIworks Administrator

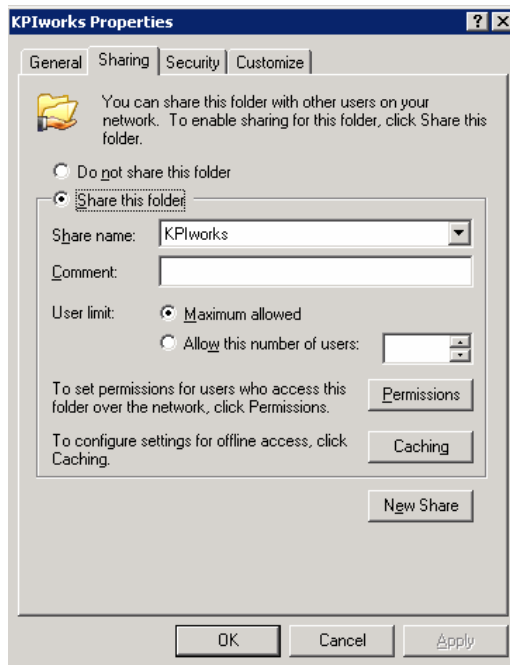
Before installing and configuring KPIworks Administrator, there are two steps that must be completed. The first is to share the files on the server running KPIworks.

Sharing an Application Folder

In the Program Files folder, chose your Application folder – in this case, KPIworks. Expand the folder and chose the part of the application you would like to share. In this example, KPIworks is the folder we want to share because it contains the data and log files.

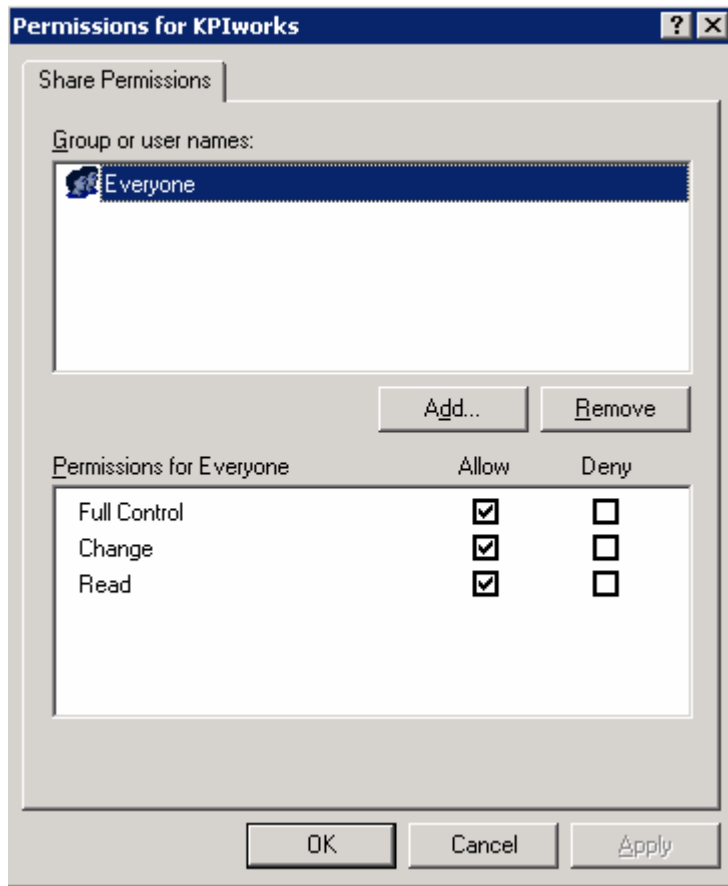


Right click on the folder and chose *Sharing and Security*. You should get the following screen:

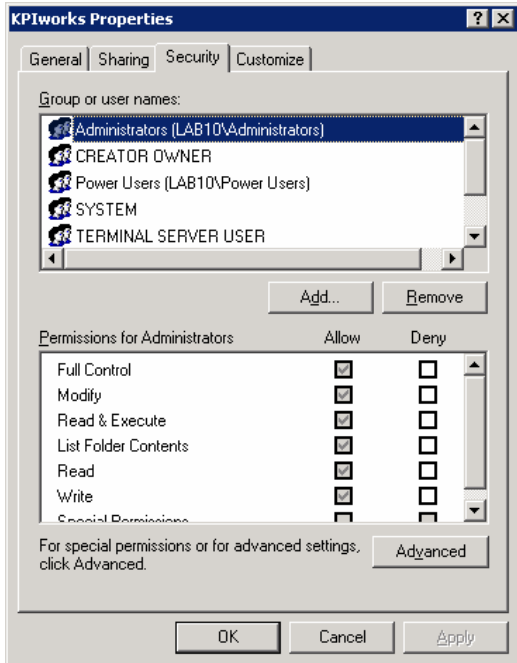


Chose "Share this folder" and chose OK.

Click on the *Permissions* button. Make sure under *Allow* is checked off for Everyone, then hit OK.



Under the *Security* tab. Make sure under Permissions for Administrators, *Full Control* is checked off under *Allow*.



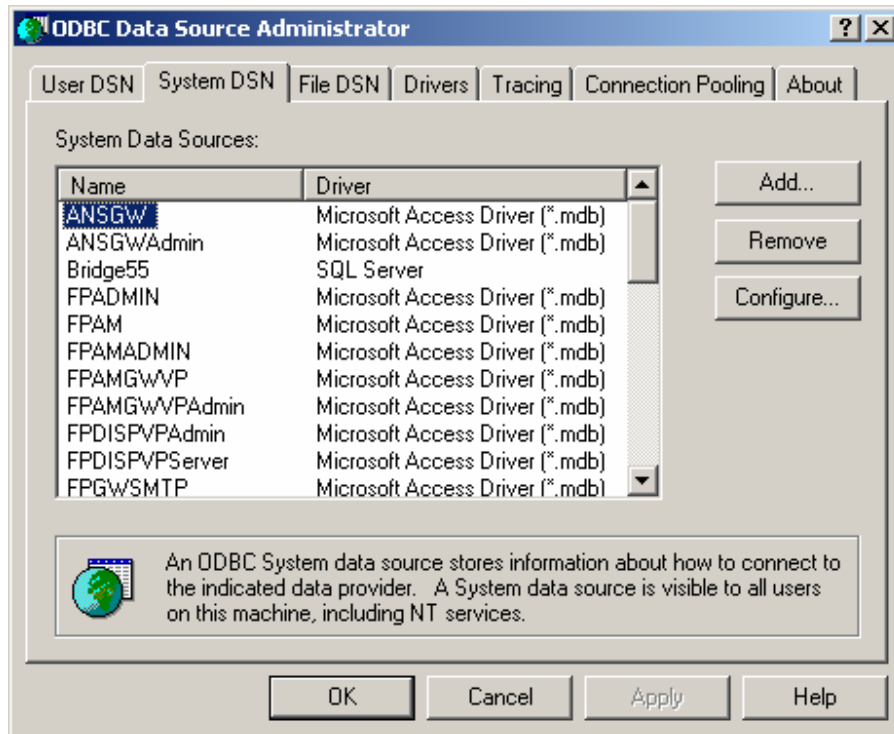
Choose OK. An icon of a hand holding a folder will appear before the folder you are sharing.



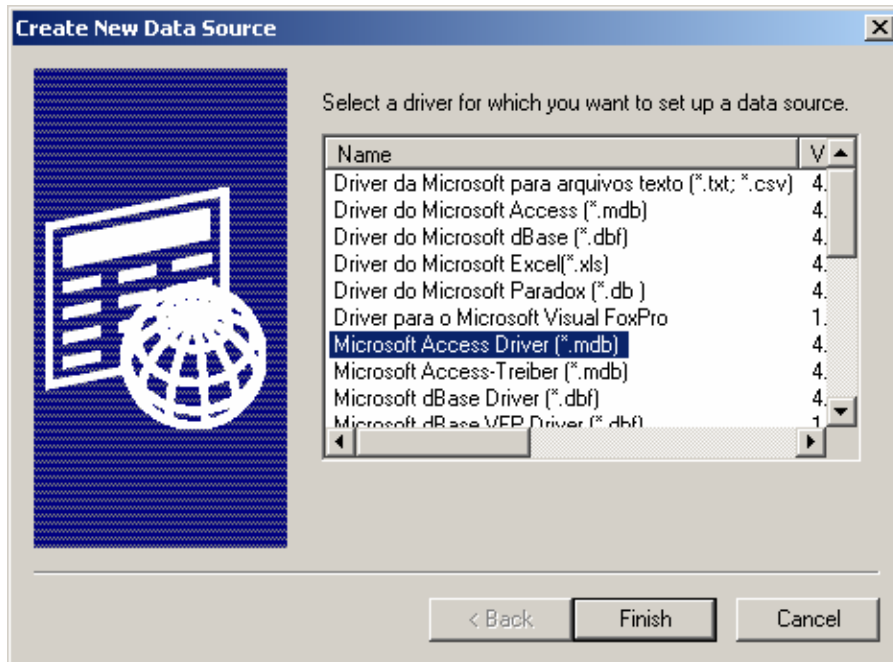
Creating a DSN

The first step is to create a DSN. This must be done on the computer where the KPIworks Administrator will be installed.

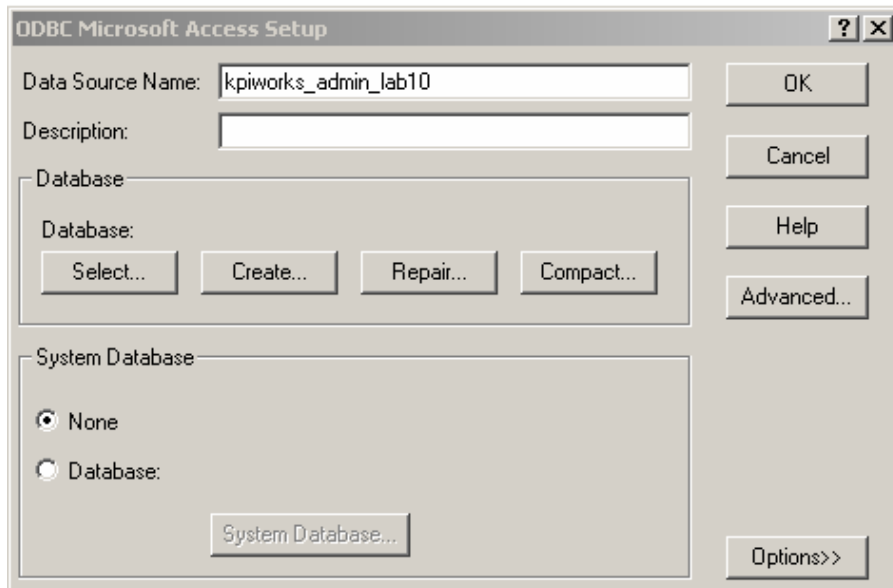
In Windows, go to Start > All Programs > Administrative Tools > Data Sources (ODBC). Chose the System DSN tab:



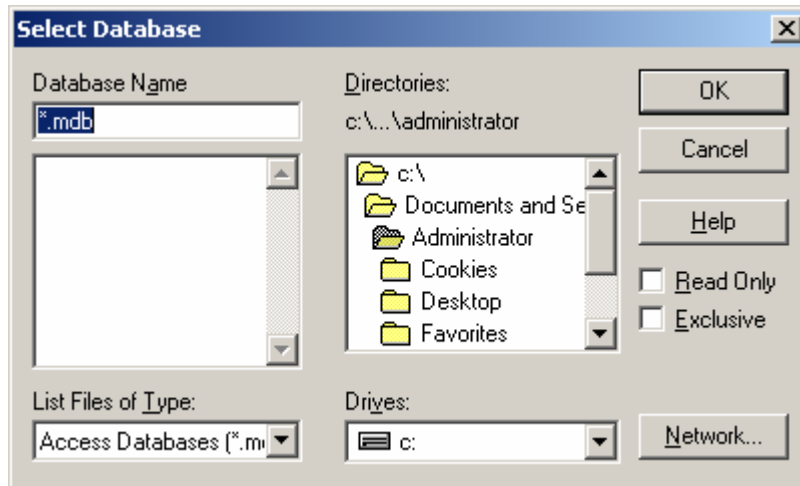
Chose the *Add* button to get this screen:



Double click on *Microsoft Access Driver (*.mdb)* and enter the name of the application, adding the name of the computer where it resides.



Chose *Select* to choose an existing database. The following screen will appear:



In the *Database Name*, type "\\", the name of the computer the Server Application is installed on, "\", the share name, "\ data \" and the name of the database file.

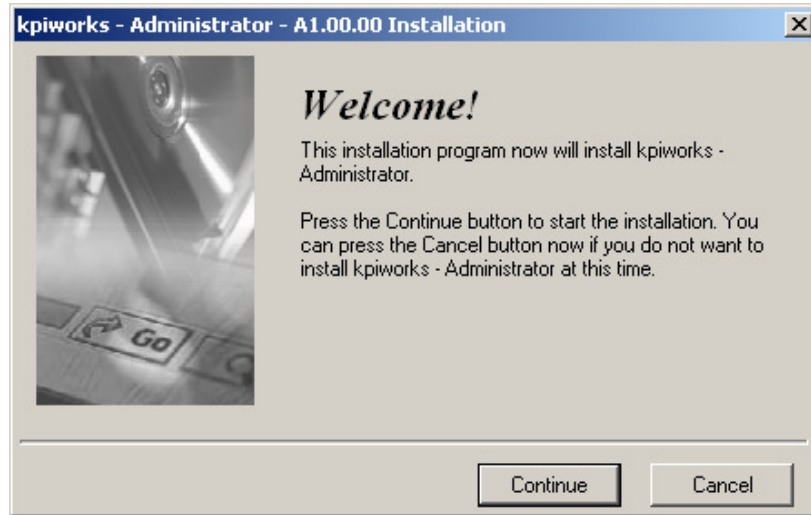
Click OK and your new DSN name should appear.

Click OK.

Setting up the Administrator

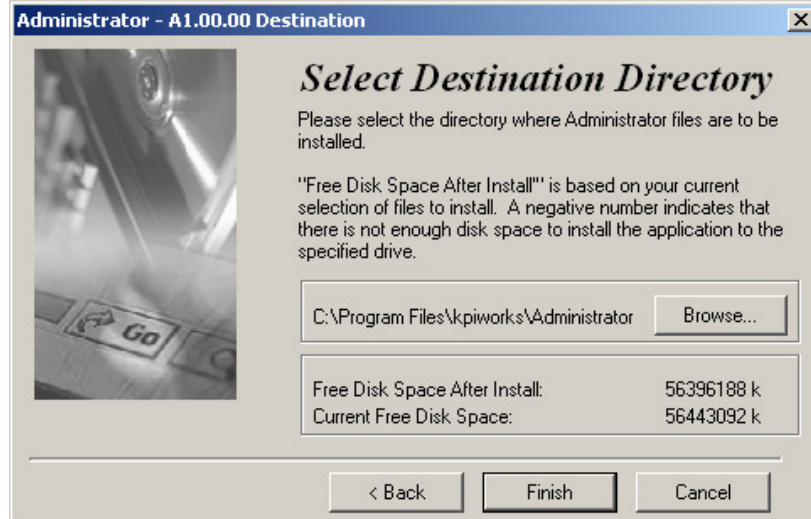
1. Run SETUP.EXE and the following screen will appear:

KPIworks
Administrator
Install

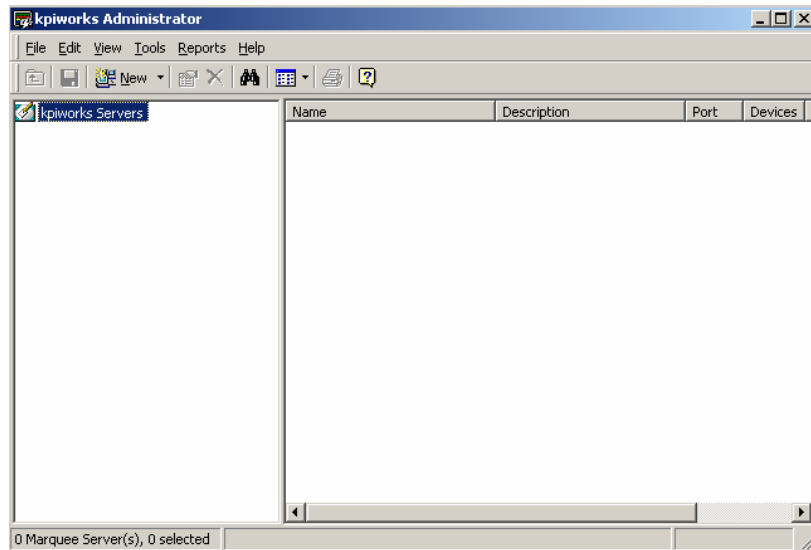


2. Click *Continue*. During install, you will only be prompted for the install directory:

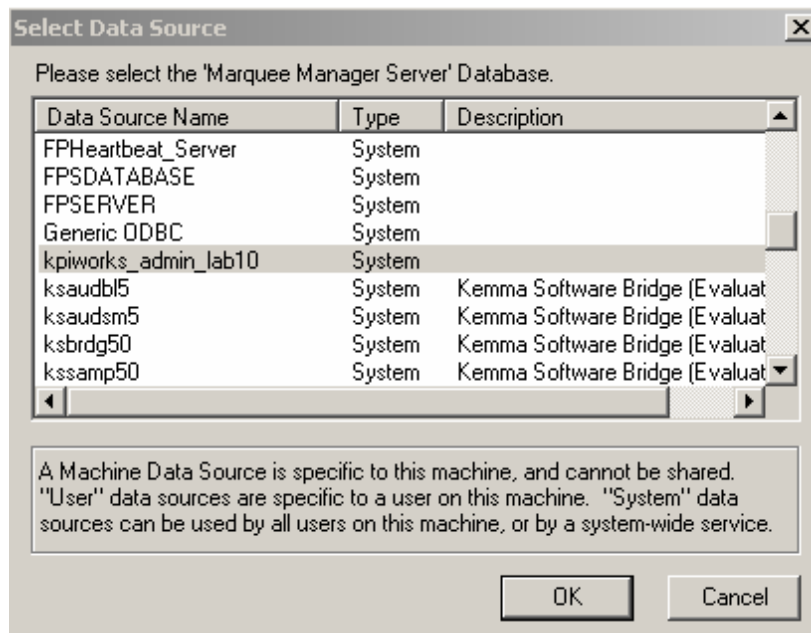
KPIworks
Administrator
Install



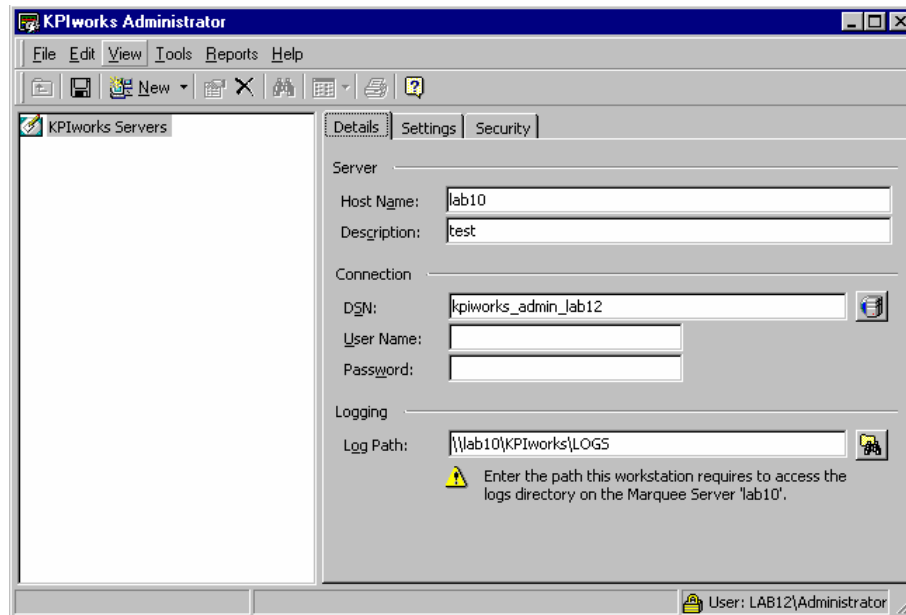
3. Select Finish. When you launch KPIworks Administrator, you will get the following screen:



4. Select "New " and the following screen will appear:



5. Choose the DSN that you created in the previous steps, and hit OK.
6. On the Details tab, under Server, enter your Host Name. This should be the name of the computer your Server Application is installed on. Enter a description. Then enter a *Description*.
7. Select the *Log Path* required to view the log on the KPIworks server machine. E.g. \\Lab10\KPIworks\LOGS\



8. The *Settings* tab displays the details from the KPIworks Administrator. These fields are greyed out and cannot be edited from the remote Administrator. The *Security* tab displays the security type that was set up on the server. These fields are greyed out and cannot be edited from the remote Administrator.
9. Click the **Save** icon in the toolbar to save changes.
10. The Items and Events that have been configured on the KPIworks server will now be displayed. You may now begin to add or configure routing rules from the KPIworks Administrator.