

# Insight Tile KPI Definition

SYSPRO 8

Reference Guide

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# Insight Tile KPI Definition

## Exploring

### Where does it fit in?

This program lets you define specific thresholds for targets or KPIs and highlight these values on business insight tiles.

**Business Insights** are essentially SQL scripts that are exposed as **Tiles** in a SYSPRO web view. These tiles are context-driven and enable you to act instantly on events, facilitating both informed business decisions and sound business behavior.

Things you can do in this program include:

- Define thresholds for tiles.
- Define the visual change in tiles when the threshold is reached.

## Navigation

- This program is accessed from the **Program List** pane of the SYSPRO menu.  
*SYSPRO Programs > Administration > General Setup*



# Solving

## Warning messages

### **The critical low threshold value must be less than the warning low threshold value**

The values you have entered are incorrect. The value of the warning threshold must be less than the value of the critical threshold.

### **The critical high threshold value must be higher than the warning high threshold value**

The values you have entered are incorrect. The value of the warning threshold must be less than the value of the critical threshold.

### **The icon is invalid. Use the browse to see a list of valid icons.**

This message is displayed if you typed the icon name into the field and the icon does not exist. Search for and select the icon from the list to ensure you using the correct name.

## FAQs

### **Why can't I enter a specific target value?**

You can only use a fixed target value if the selected type goal is **Target Value**.

You can't select a target value for **Minimizing** or **Maximizing** type tile goals.

### **The tile already has an icon. What happens if I specify another icon when the warning or critical thresholds have been reached or exceeded?**

When the warning value has been reached or exceeded, the warning icon will override the existing icon. The same happens when the critical threshold is reached or exceeded, and the critical icon will override the warning icon.



# Using

## Attributes

When creating a standard tile in a SYSPRO web view, you can specify the following attributes:

- Tile name
- Optional parameter values to be used at run time
- Tile width (small or large)
- Main text color
- Tile background color
- Optional icon and icon color

When adding KPI attributes to a tile, the tile value is compared to pre-defined thresholds. When these thresholds are reached or exceeded, the visual appearance of the tile can change. This will draw the user's attention, allowing them to take appropriate action.

The following tile attributes can be changed when a threshold is reached or exceeded:

- Main value text color
- Tile background color
- Optional icon and icon color




## KPI goals and thresholds

When defining a KPI for a tile you specify the objective for creating the threshold. These can be one of the following:

- Minimizing
  - the ideal value must be as small as possible.
  - can have a negative or zero value.
  - can have a warning high and a critical high threshold.
- Maximizing
  - the ideal value must be as large as possible.
  - can have a warning low and a critical low threshold.
- Target value
  - the ideal tile value is a fixed value.
  - has high and low thresholds.
  - Warning and critical values lie within a range.
  - can have a warning high and a critical high thresholds for both high and low values.

A warning and a critical threshold can be defined and you can indicate whether the value only has to be reached or exceeded.

When the warning threshold is reached or exceeded a certain set of attributes is applied (e.g. an orange background). When a critical threshold is reached or exceeded, another set of attributes is applied (e.g. a red background).

-  If no threshold is reached, the tile attributes that were defined at the time of creating the tile is used.



## KPI levels

KPIs on business insight tiles can be created for a number of different levels (in order of priority):

- Operator
- Role
- Company
- System-wide



## Tasks

### How to add KPIs to a tile

1. Open the **Insight Tile KPI Definition** program.
2. From the **Tiles** pane, select the tile for which you want to add KPIs.
3. Decide on the level where the tile should be deployed. If the tile has not been added or deployed yet, select **Add**, else select **Edit KPI**.
  - Select **Add** or **Edit KPI** at the **System KPI** column to add or maintain the tile on system level. Everyone on the system will be able to see the tile.
  - Select **Add** or **Edit KPI** at the **Company KPI** column to add or maintain the tile on company level. Everyone that has access to the company will be able to see the tile.
  - Select **Add** or **Edit KPI** at the **Role KPI** column to add or maintain the tile on role level. You can then select the roles for which you are adding the tile.
  - Select **Add** or **Edit KPI** at the **Operator KPI** column to add or maintain the tile on operator level. Only the operator for whom the tile is created will be able to see the tile.

The **Tile KPI Maintenance** screen is displayed.

4. From the **Items** pane, select **Add** or **Edit**.

The fields on the **KPI Properties** pane are enabled.
5. Edit the KPI properties.
6. Select **Save KPI**.





# Referencing

## Menu and Toolbar

Field	Description	
<b>File</b>	Close	This returns you to the previous screen.
<b>View</b>	Refresh	This refreshes the view.
<b>Filter KPI Where Used</b>	When ticked, only tiles that have KPIs are displayed in the list view.	

## Web View

This pane displays the tiles for which KPIs and thresholds have been created.



# Tiles

This pane displays a list of standard tiles that are shipped with SYSPRO, as well as custom tiles (if applicable).

Field	Description
<b>Tile</b>	Indicates the tile description.
<b>Tile name</b>	Indicates the tile name.
<b>Where used</b>	<p>If the tile is used, you can select <b>View</b> to display the <b>Tile Where Used</b> pane.</p> <p>The number of instances the tiles is used throughout the system is displayed in brackets behind the <b>View</b> link.</p>
<b>System KPI</b>	<p>Select <b>Add</b> to add the tile on system level. Everyone on the system will be able to see the tile.</p> <p>If the tile has already been added, select <b>Edit KPI</b> to edit the KPI properties.</p>
<b>Company KPI</b>	<p>Select <b>Add</b> to add the tile on company level. Everyone that has access to the company will be able to see the tile.</p> <p>If the tile has already been added, select <b>Edit KPI</b> to edit the KPI properties.</p>
<b>Role KPI</b>	<p>Select <b>Add</b> to add the tile on role level. You can then select the roles for which you are adding the tile.</p> <p>If the tile has already been added, select <b>Edit KPI</b> to edit the KPI properties.</p>
<b>Operator KPI</b>	<p>Select <b>Add</b> to add the tile on operator level. Only the operator for whom the tile is created will be able to see the tile.</p> <p>If the tile has already been added, select <b>Edit KPI</b> to edit the KPI properties.</p>
<b>Standard or custom</b>	Indicates whether the tile is a <b>Standard</b> , i.e. shipped or <b>Custom</b> tile.



## Tile KPI Maintenance

This is displayed when you select **Add** or **Edit KPI** within the **Tiles** pane.

### Items

Field	Description
<b>Description</b>	This indicates the level at which the tile was created. <ul style="list-style-type: none"><li>▪ <b>System-wide KPI</b> indicates tiles created at system level</li><li>▪ <b>Company name</b> indicates tiles created at company level</li><li>▪ <b>Role description</b> indicates tiles created at role level</li><li>▪ <b>Operator name</b> indicates tiles created at operator level</li></ul>
<b>Item</b>	Depending on which level the tile is created, this displays either: <ul style="list-style-type: none"><li>▪ <b>System</b> is displayed for tiles created at system level</li><li>▪ <b>Company</b> is displayed for tiles created at company level</li><li>▪ <b>Role</b> is displayed for tiles created at role level</li><li>▪ <b>Operator</b> is displayed for tiles created at operator level</li></ul>
<b>Edit</b>	Select <b>Add</b> to add the tile or <b>Edit</b> to edit the tile's KPI properties.
<b>Delete</b>	This deletes the tile.

## KPI Properties

Field	Description						
<b>Save KPI</b>	This saves the KPI properties of the tile.						
<b>Tile definition</b>							
Tile description	Indicates the description of the selected tile.						
Tile goal	<p>Select the objective of the tile (i.e. what you want to highlight). You can select one of three tile goals:</p> <table border="1"> <tbody> <tr> <td>Minimizing</td> <td>Select this for tiles where the ideal value is as small as possible.</td> </tr> <tr> <td>Maximizing</td> <td>Select this for tiles where the ideal value is as large as possible.</td> </tr> <tr> <td>Target value</td> <td> <p>Select this for tiles where the ideal tile value is a fixed value, but can deviate to either side.</p> <p>Warning and critical values lie within a range.</p> </td> </tr> </tbody> </table>	Minimizing	Select this for tiles where the ideal value is as small as possible.	Maximizing	Select this for tiles where the ideal value is as large as possible.	Target value	<p>Select this for tiles where the ideal tile value is a fixed value, but can deviate to either side.</p> <p>Warning and critical values lie within a range.</p>
Minimizing	Select this for tiles where the ideal value is as small as possible.						
Maximizing	Select this for tiles where the ideal value is as large as possible.						
Target value	<p>Select this for tiles where the ideal tile value is a fixed value, but can deviate to either side.</p> <p>Warning and critical values lie within a range.</p>						
Target value	Indicate the fixed target value for tiles that have a target value tile goal.						
<b>Warning high</b>							
Warning high required	<p>Select this to specify the warning high value.</p> <p>This applies to tiles with <b>Minimizing</b> and <b>Target value</b> goals, where the aim would be a value that is either fixed or as low as possible.</p>						
Threshold value	Enter the value on or above which the warning properties will be displayed.						
Threshold condition	<p>Select the warning threshold condition:</p> <ul style="list-style-type: none"> <li>■ <b>&gt;=</b> - greater than and equal to warning properties are applied when the value is reached</li> <li>■ <b>&gt;</b> - greater than warning properties are applied when the value is exceeded</li> </ul>						



Field	Description
<b>Warning low</b>	
Warning low required	Select this to specify the warning low value. This applies to tiles with <b>Maximizing</b> and <b>Target value</b> goals, where the aim would be a value that is either fixed or as high as possible.
Threshold value	Enter the value on or below which the warning properties will be displayed.
Threshold condition	Select the warning threshold condition, which can be: <ul style="list-style-type: none"><li>■ <b>&lt;=</b> - less than and equal to warning properties are applied when the value is reached</li><li>■ <b>&lt;</b> - less than warning properties are applied when the value is exceeded</li></ul>
<b>Warning properties</b>	



Field	Description
Warning tile color	Specify the background tile color that will be applied when the warning threshold is reached or exceeded.
	No override   No background color will be applied.
	Warning   The background color will change to orange .
	Critical   The background color will change to red.
	Primary   The background color will change to the default color, which is a mid-tone blue.
	Info   The background color will change to turquoise.
	Success   The background color will change to green.
	Inverse   The background color will change to the inverse or opposite color.
	Gray   The background color will change to gray.
	LightGray   The background color will change to light gray.
	VeryLightGray   The background color will change to very light gray.
	White   The background color will change to white.
Custom RGB   The background color will change to a custom color you can select.	
Warning tile color RGB	Displays the RGB color code for the selected color.
Warning value color	Specify the font color that will be applied to the value when the warning threshold is reached or exceeded.  The options here are the same as explained in the <b>Warning tile color</b> field.
Warning value color RGB	Displays the RGB color code for the selected font color.



Field	Description
Warning icon	Select an icon that will be displayed in the left-hand bottom corner of the tile when the warning threshold is reached or exceeded.
Warning icon color	Specify a color for the icon that will be displayed when the warning threshold is reached or exceeded.
Warning icon color RGB	Displays the RGB color code for the selected icon color.
<b>Critical high</b>	
Critical high required	Select this to specify the critical high value.  This applies to tiles with <b>Minimizing</b> and <b>Target value</b> goals, where the aim would be a value that is either fixed or as low as possible.
Threshold value	Enter the value on or above which the critical properties will be displayed.
Threshold condition	Select the critical threshold condition, which can be: <ul style="list-style-type: none"> <li>■ <b>&gt;=</b> - greater than and equal to warning properties will be applied when the value is reached</li> <li>■ <b>&gt;</b> - greater than warning properties will be applied when the value is exceeded</li> </ul>
<b>Critical low</b>	
Critical low required	Select this to specify the critical low value.  This applies to tiles with <b>Maximizing</b> and <b>Target value</b> goals, where the aim would be a value that is either fixed or as high as possible.
Threshold value	Enter the value on or below which the critical properties will be displayed.




Field	Description
Threshold condition	Select the critical threshold condition, which can be: <ul style="list-style-type: none"><li>▪ <math>\leq</math> - less than and equal to warning properties will be applied when the value is reached</li><li>▪ <math>&lt;</math> - less than warning properties will be applied when the value is exceeded</li></ul>
<b>Critical properties</b>	
Critical tile color	Specify the background tile color that will be applied when the critical threshold is reached or exceeded. The options here are the same as explained in the <b>Warning tile color</b> field.
Critical tile color RGB	Displays the RGB color code for the selected color.
Critical value color	Specify the font color that will be applied to the value when the critical threshold is reached or exceeded. The options here are the same as explained in the <b>Warning tile color</b> field.
Critical value color RGB	Displays the RGB color code for the selected font color.
Critical icon	Select an icon that will be displayed in the left-hand bottom corner of the tile when the critical threshold is reached or exceeded.
Critical icon color	Specify a color for the icon that will be displayed when the critical threshold is reached or exceeded.
Critical icon color RGB	Displays the RGB color code for the selected icon color.





## Tile Where Used

Field	Description
Source	<p>This displays the source of the tile (i.e. for which level the tile was created).</p> <p> Use the <b>Field Chooser</b> to add the <b>Definition file</b> column to view the actual file name and location of each tile.</p>
Operator/Role	<p>This displays the operator or role description where the tile is used.</p>
Type	<p>This displays the type of tile (e.g. program).</p>
View	<p>This displays the view where the tile is displayed.</p>
Program	<p>This displays the program name where the tile is displayed.</p>
Program description	<p>This displays the program description where the tile is displayed.</p>



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