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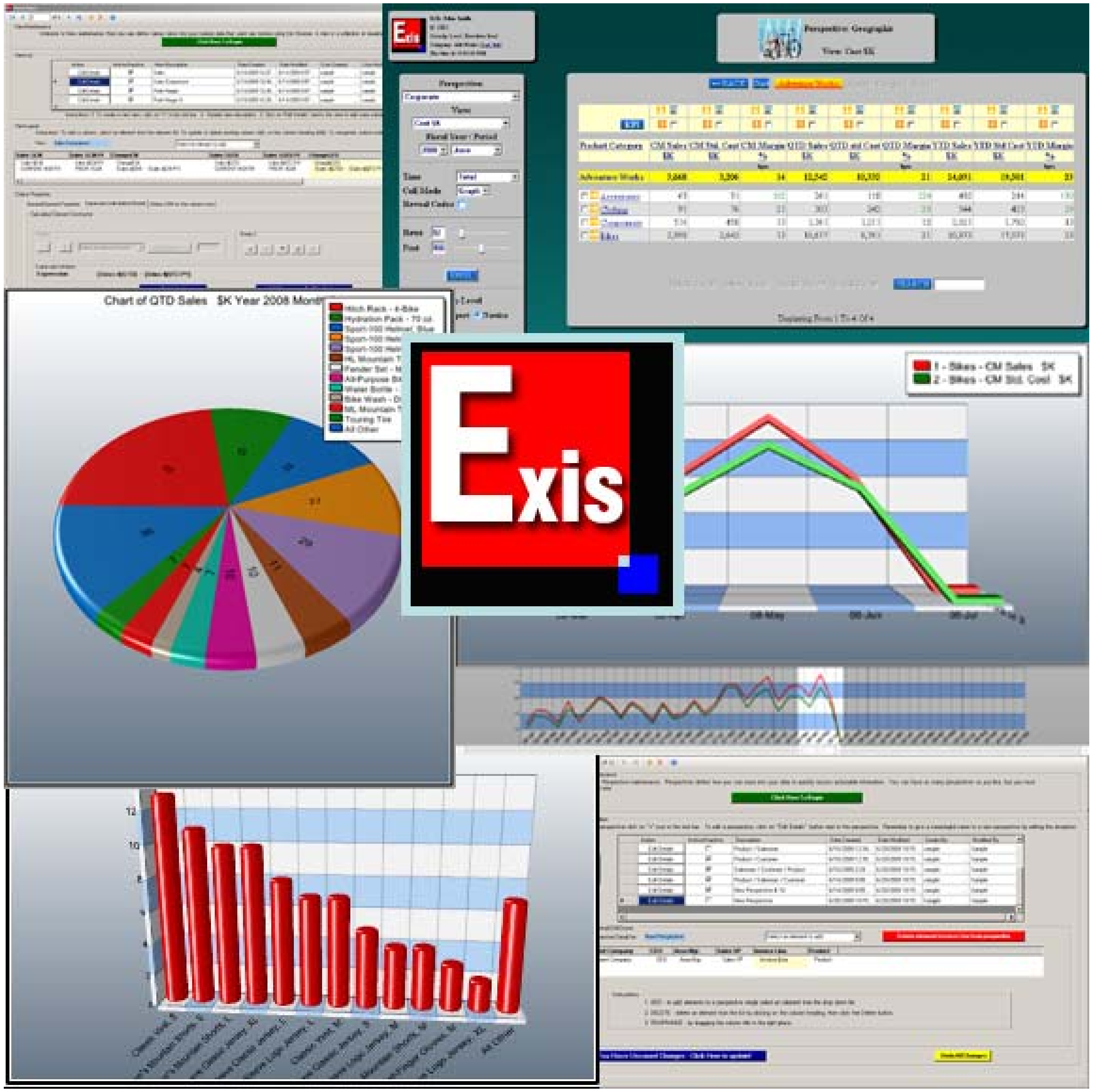

ExisOne User Manual

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Thank you for purchasing license to use ExisOne. We believe that ExisOne is a feature laden truly turnkey business intelligence system. It is designed for decision makers from CEO to salesmen. While business analyst can rapidly access, select, extract and download up-to-date data for further manipulation with Excel, it is best for line managers. CEOs through salesman can view, in a few seconds, current or historical data that is actionable.

You will find that ExisStudio makes implementing ExisOne a relatively easy and rapid without unnecessary expense of outside consultants. See page 10.

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DESIGN GOALS

ExisOne is full featured business intelligence software designed with the following goals:

1. Target audience of decision makers in an enterprise from CEO to salesman.
2. Rapid implementation without need for consultants.
3. Clean user screen with intuitive user interface that requires no typing.
4. Dictionary based data warehouse to support source data from multiple sources.

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Glossary of Terms

Allocated Element: It is an element of a transaction whose value is the result of allocation across a group of transactions. An example is freight allocated to several line items of a single invoice based on weight.

Category: Source data which may be transactions, lookup tables or master files.

Effective Date: Master files may have more than one record for the same index element(s). Effective date element specifies the beginning date for the data in the record.

Element: Each item or field of data in categories, defined by administrator or automatically generated by ExisOne

ExisOne: Business intelligence software consisting of (1) Exis Studio, (2) ExisWarehouse and (3) ExisViewer.

ExisStudio: A collection of wizards to implement ExisOne and manage/maintain it.

ExisViewer: A system to display actionable information to decision makers.

ExisWarehouse: Warehouse of data including transactions, lookup tables, master files, and fiscal calendar. The data is cross-linked and aggregated for fast response.

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Fiscal Calendar: Defines when each fiscal period starts and ends.

Fiscal Period: Element type to indicate the fiscal period in a transaction category. If fiscal period is used instead of transaction date, then fiscal year must be used.

Fiscal Year: Element type to indicate the fiscal year in a transaction category. If fiscal year is used instead of transaction date, then fiscal period must be used.

Key Performance Indicator: Graphical representation of number of entries currently. Examples number of customers buying a product.

Key Performance Measure (KPM): Elements those are important to identify where action may be required.
Perspective: Specifies the sequence for drill down.

Lookup Tables: These have elements to extend hierarchy of elements in a transaction record. For example an invoice record would have salesman code but not name or his/her superiors. A lookup table can specify the name; territory; manager; VP; CEO; etc See also master files.

Master Files: Master files are similar to lookup tables with one key difference. Master files records have an effective date for each record. Thus, a product master file may have more than one record for the same product to specify standard cost and its effective date.

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Quarter-to-Date (QTD): When selected for a numeric element in a transaction, ExisWarehouse will automatically generate a QTD of the element and maintain a running quarter-to-date totals for the element. See also Year-to-Date

Related Elements: Specifies two or more alphanumeric elements that represent the same identity. For example product code and product name. Only the first element is used by ExisWarehouse. ExisViewer, as default, will display the related element(s).

Transaction: Transaction type categories have recurring data such as open sales orders; sales invoices; open sales invoices; sales budgets; purchase orders; production etc.

Transaction Date: It is an element in a traction category used by ExisWarehouse to determine both fiscal period and fiscal year. It must be used if the transaction category does not include elements for fiscal period and year.

Year-to-Date (YTD): When selected for a numeric element in a transaction, ExisWarehouse will automatically generate a YTD of the element and maintain a running year-to-date totals for the element. See also Quarter-to-Date

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EXISONE FEATURES

1. **Rapid implementation:**
   a. Setup wizards greatly simplify defining your source data and user specific displays.
   b. Enterprises that use more than one order processing and/or accounting systems do not need to convert them to a consistent format. This is possible because ExisOne uses dictionary to map input from all sources, converts all data to a consistent format and stores in Exis data warehouse.
   c. It is possible to implement ExisOne in phases. For example you can start with "Sales" data and then extend it with other data such as "Production" and "Accounting". When new type of transaction data are added, ExisOne will automatically create all links to the data in the warehouse.
2. **Data warehouse:**
   a. Accepts three types of source data.
      i. Transactions such as invoices, sales orders, purchase orders, production, budgets, etc.
      ii. Lookup tables to add to transaction records. For example an invoice would have product code, salesman code. Lookup tables can specify product group, business area, sales manager, VP-sales, CEO etc.
      iii. Master files which are similar to lookup tables except that data are date dependent. An example is standard cost of products which vary every year.

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b. Supports related data such as product code and product name; customer code and customer name etc.

c. There are three types of calculated elements; a calculated element to extend data in any transaction record, a virtual calculated element and a calculated element in a view.

3. **Very easy to use ExisViewer:**

a. User can learn to use ExisViewer in just minutes without reading any manual. There is only one display screen and virtually everything on the screen is clickable. The screen is very intuitive and there is contextual help for everything. The help is displayed when the cursor is held on a clickable item for about 2 seconds. The help text can be none, brief or detailed.

b. No typing skills are required. Except for typing password to login, everything is done by just moving and clicking a mouse.

4. Full featured ExisViewer – response time for all of these is just a few seconds and require only one or two clicks of a mouse:

a. View data from different perspectives such as sales organization, customer, product etc. User can rapidly drill down (zoom in) in any perspectives for details. For example, VP-Sales can get summary of all sales invoices, orders and payments for a customer prior to visiting a customer. Or, CEO can see current (and/or QTD, YTD) sales, budget, production and inventory on a single display in less than 5 seconds.

b. Data viewed can be nearly real-time, if source data is uploaded frequently during the day. It is possible to view data posted as of prior day, activity since prior day or total of both.

c. Key Performance Measure (KPM) helps identify items that require action.

d. User can select any fiscal period. Default is current fiscal period. But, user can change the fiscal year and period.
e. Rapidly change displayed data at any level of any perspective. For example, within seconds, it is possible to change from current sales data to sales growth or comparison of margin contribution to prior year.
f. Slice vertically to view a column of data for a full year. Or, slice horizontally to view a row of data for a full year.
g. View data either as a table or a graph. With a single click of a mouse a column of data can be displayed as either a bar chart or a pie chart. A single click at any number will show a line chart of all historical data for the same row and column. For comparison, multiple lines in a chart are possible.
h. Business analysts can send any display to an Excel spreadsheet with a mouse click.
i. It is possible to see all transactions making up a single number in a display. For example, a salesman can view details of all invoices for his/her sales of a product to a customer.

5. Secure

a. There are four levels of security.
b. Secured web access – all data transferred over internet are encrypted.
c. Only authorized users can access ExisViewer.
d. User is shown only the data he/she can influence. A CEO can see enterprise level data while a salesman can view only the data for his/her territory. It is possible to allow a user access to all or only specific perspectives.

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e. Each element of data and each user are to be assigned a security level. If the level for an element exceeds the user's level, the column with that element will not be displayed. For example sensitive data such as contribution margin can be assigned a higher level of security so a salesman would not see any column with contribution margin.

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STEPS TO IMPLEMENT EXISONE

Following are the tasks to implement ExisOne. Detailed step by step guide for each task starts on page.

1. Install ExisStudio
2. Start ExisStudio
3. ExisStudio Tutorial
4. Define fiscal calendar
5. Define categories
6. Define calculated elements
7. Define related elements
8. Define virtual elements
9. Define allocated elements
10. Element Maintenance
11. Define perspectives
12. Define views
13. Create users
14. Upload data
15. Define security for each user

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INSTALLING EXISSTUDIO

1. You should have the software on a CD media, your company id and password.
2. You will need a PC with XP or later release of Microsoft Windows, 32 or 64.
3. Your PC must be connected to internet. Broadband connection is highly recommended.
4. ExisStudio needs Microsoft's framework 3.5 SP1 to run. When you install ExisStudio, the installation process will check your computer to see that you have the correct framework installed. If it is not installed, it will automatically try to download the necessary Framework files from Microsoft. Please be patient, as this process can take as much as 1/2 an hour to a full hour to complete. Under certain circumstances this process may fail, in which case you will need to install the Microsoft framework 3.5 SP 1 yourself. Go to this link, and download the framework sp1 from Microsoft directly: http://www.microsoft.com/downloads/details.aspx?FamilyID=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en
5. Insert the media in your computer. Installation process should start automatically. If it does not start automatically, then:
    a. Start "My Computer" or "Explorer" and navigate to the drive where with "Exis Media".
    b. Click on "Setup".
6. Enter your company id, password and Install ExisStudio on your PC. Then click on green button to continue.

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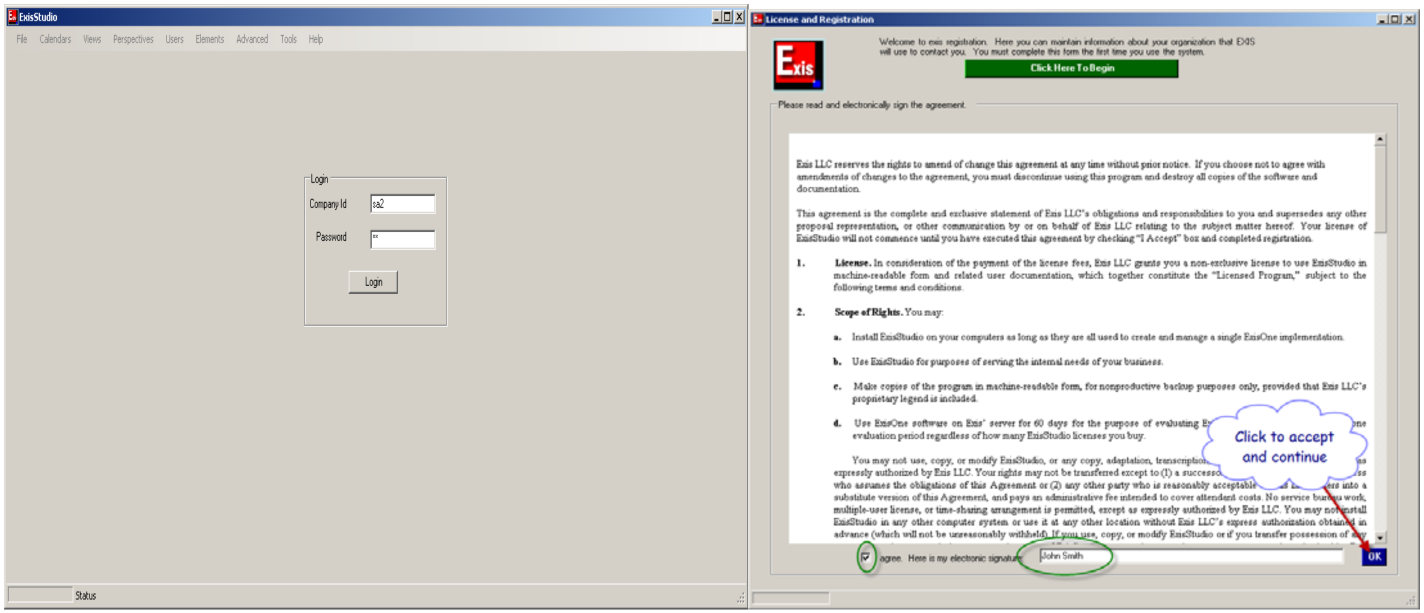
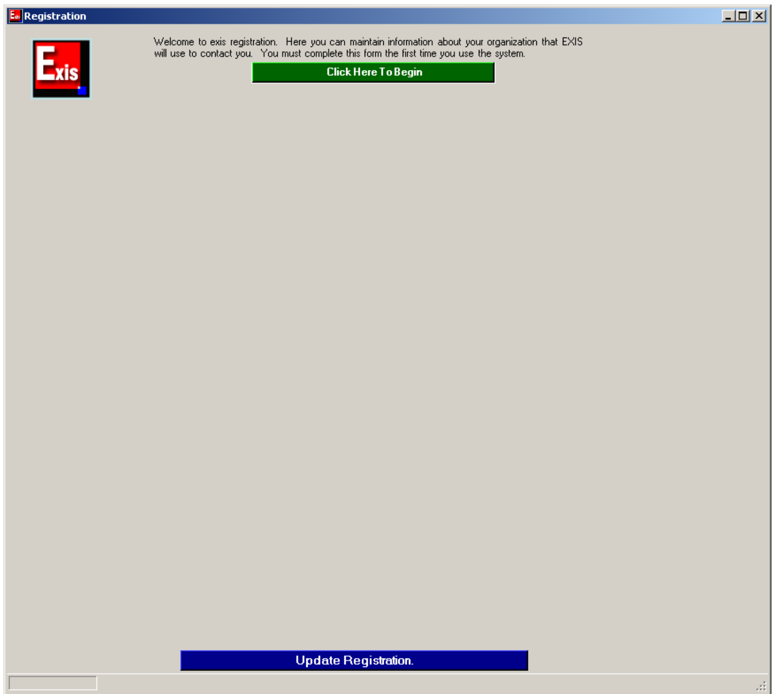
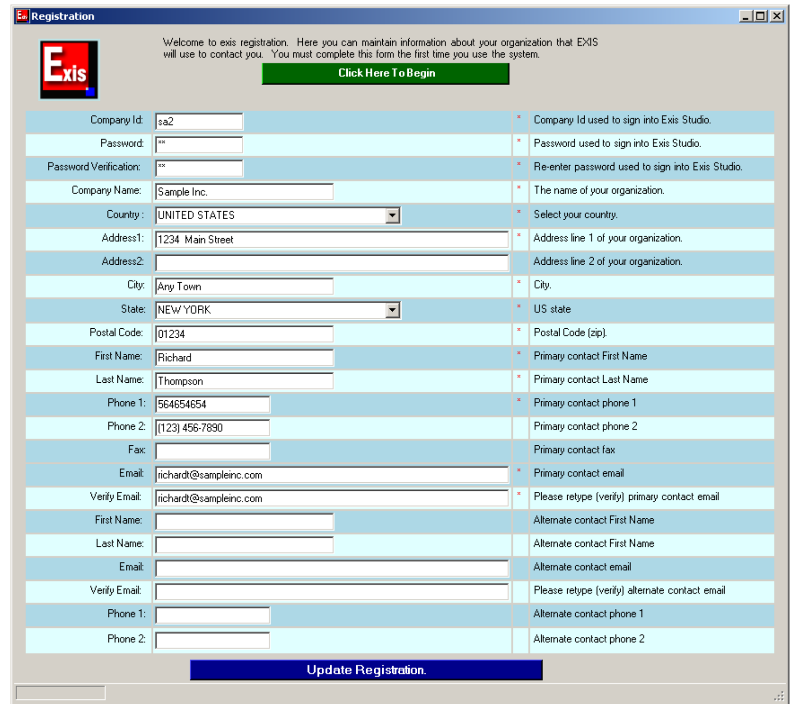


7. Accept Terms and Conditions of agreement and register. The registration form will be transmitted to Exis for validation. The contact information you provide will not be shared with any third party.





8. After installation, ExisStudio will be launched.

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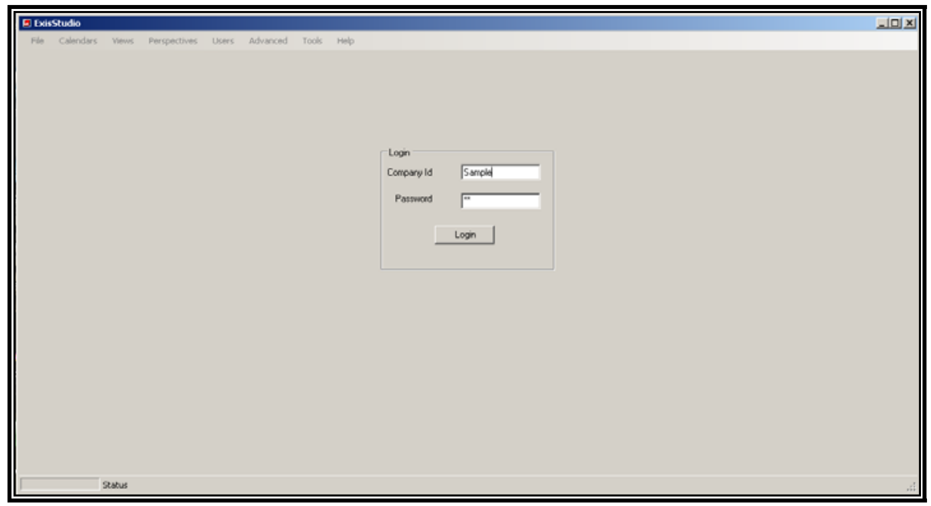
START EXISSTUDIO

Before starting ExisStudio, you will find it useful to experience demo at ExisOne business intelligence system. You will understand how ExisOne used perspectives, views and fiscal periods.

Click on ExisStudio icon on your desktop.

Enter your company id and password and then click "Login" button.

Company id and password should be in the package you received from Exis. If you have changed your password, then enter the current password.



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EXISSTUDIO TUTORIAL

We suggest that you implement ExisOne with included sample data using step by step tutorial. This will speed up implementing ExisOne with your company's data. The sample data is included with the ExisStudio media. This includes the following files in CSV (comma separated values) format:

1. Salesman Lookup Table – to convert salesman code to salesman's name and specify all levels of his superiors.
2. Customer Lookup Table – to convert customer code to customer's name and specify customer's parent company. While the sample data has only two levels, it is possible to have more levels such as Sold-To-Customer, Bill-To-Customer, Corporate-Customer, Holding Company. Exis will create all levels of rollups of numeric data.
3. Product Lookup Table – to convert a product code to product name and specify its product group.
4. Product Master – to specify a product's standard cost, list price and unit weight.
5. Invoices –all invoice transactions for several years.
6. Open Orders – all currently open sales orders.

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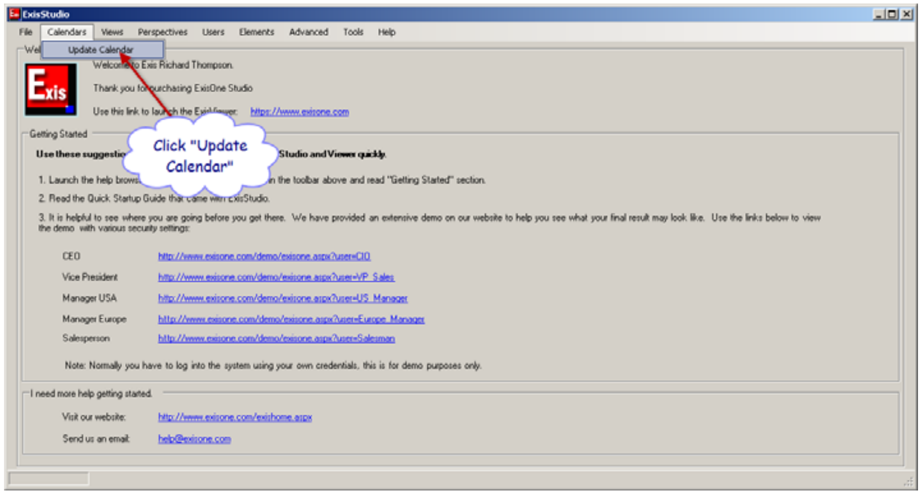
DEFINE FISCAL CALENDAR



ExisOne uses fiscal calendar to compute fiscal period and year from the transaction date.

ExisOne defaults to Gregorian calendar as the fiscal calendar. If you use a different fiscal calendar such as 4,4,5; you can specify begin and end of each fiscal period.

The sample data used Gregorian Calendar.
Skip to page

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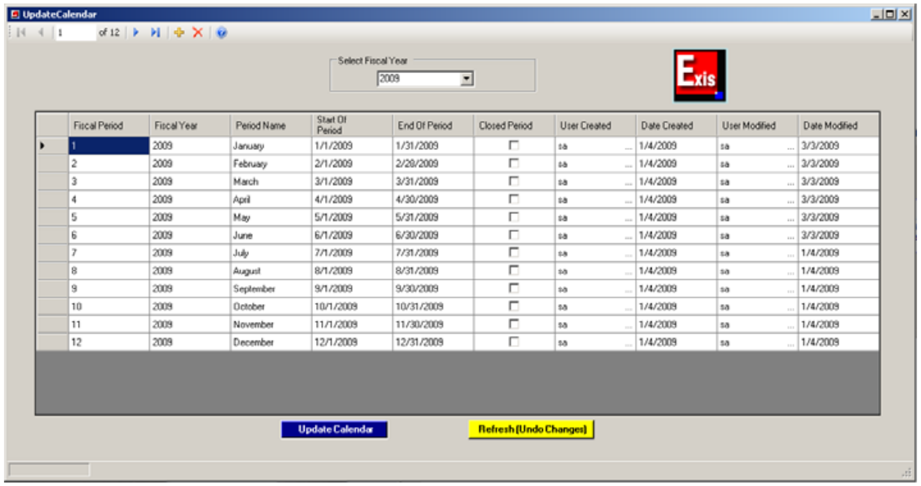

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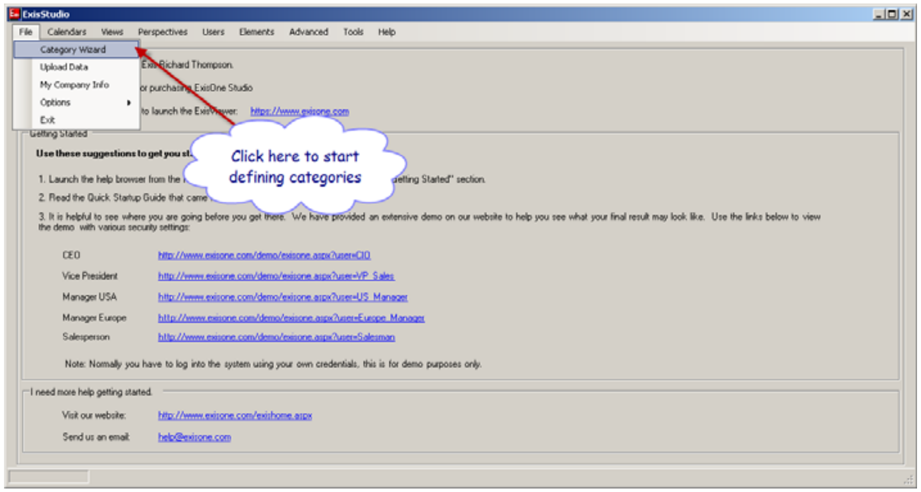
DEFINE CATEGORIES

You will be now presented with wizard menu to start defining your data base. If your company follows a different fiscal calendar than normal calendar, then you will need to define your fiscal calendar. For Sample data, we will use default calendar

We need to first define categories. A category is the file with your company's data that you upload to ExisOne.



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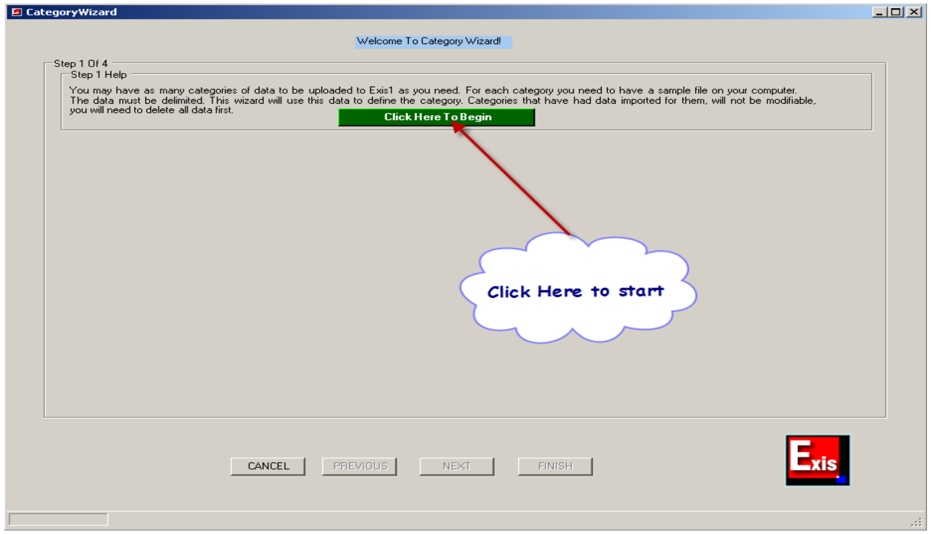
ExisStudio runs on your PC using data stored on ExisServer.

Now click on the green button to start. You will note that all wizards in ExisStudio require you to click on a green button to start the wizard. This initiates the process of collecting data from ExisServer; allowing ExisStudio to manipulate it locally on your computer.



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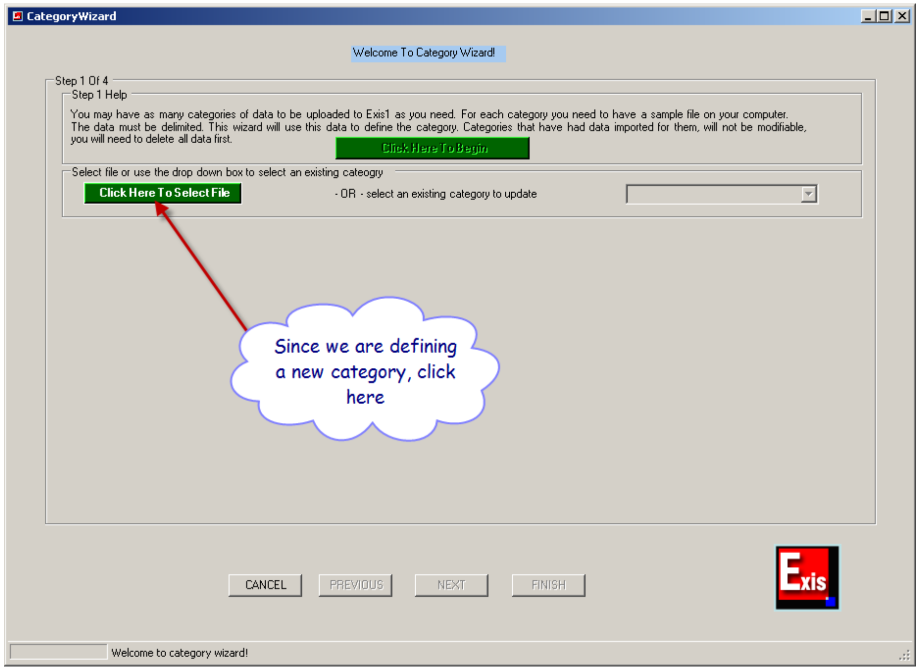
DEFINE LOOKUP TABLES

Since, you are defining a new category file, click on the button "Click here to select file".



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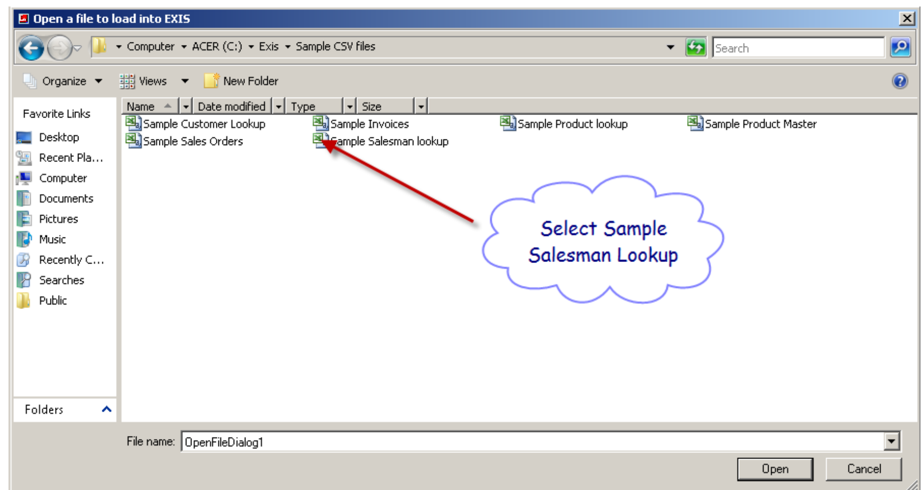
If you do not see the sample files, navigate to the directory where the sample files are stored.

It is a good practice to define lookup tables and master files before transaction categories.

First define salesman lookup table that will augment invoice data with salesman’s name, territory, territory manager, area manager, vice president of sales and CEO



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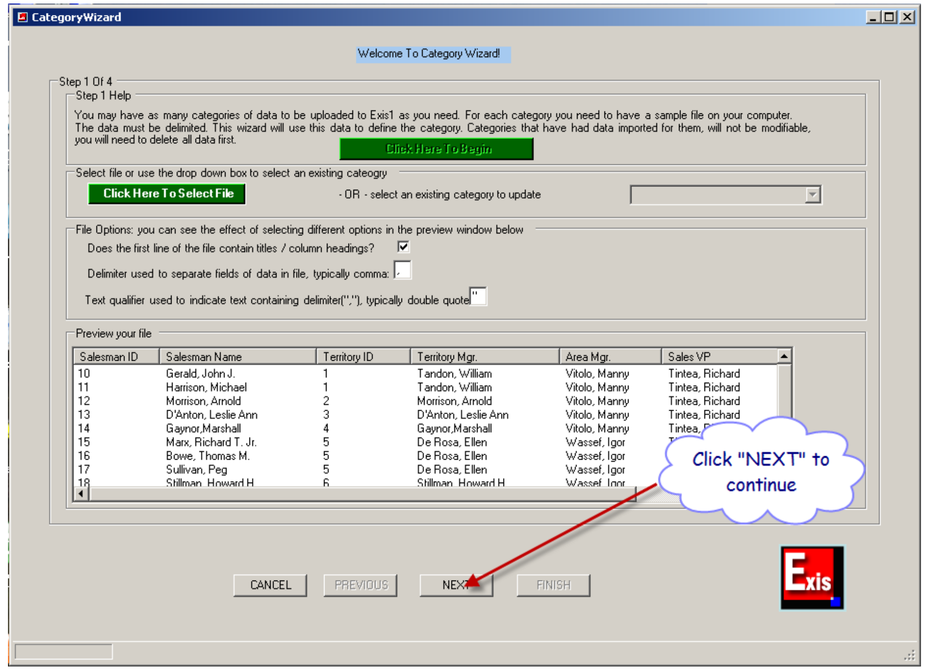
You will now see a screen with a few records from the Salesman Lookup file. If the first record does not have column title and/or data in the file is not delimited by comma; make the necessary changes so that display shows your data.

While not required, it will save some typing it the column titles are the same as the name of the element of data in the column.



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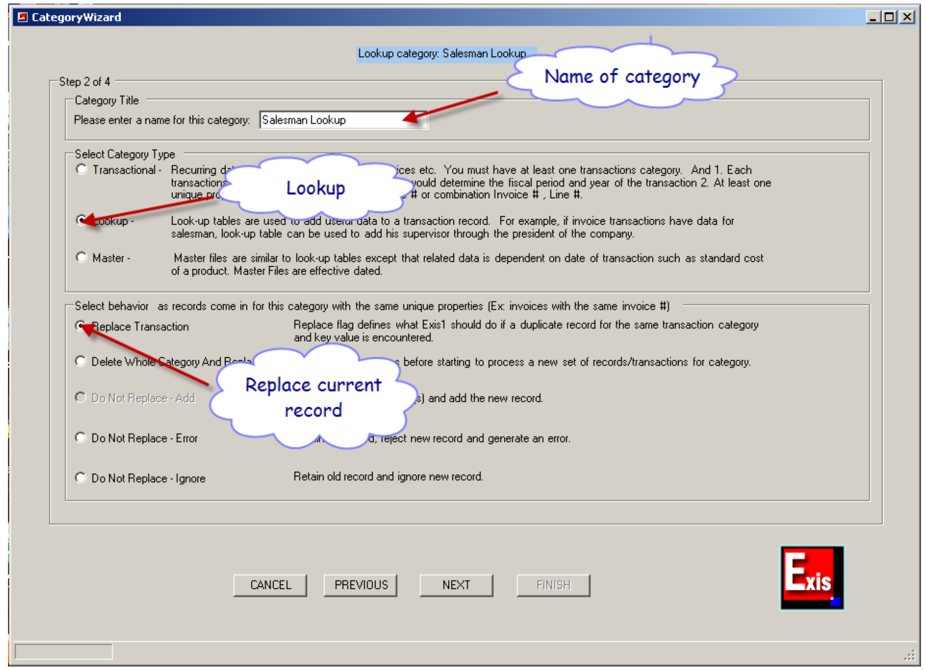
Choose an appropriate name for the category, select category type and rule for processing the category data. Replace record to indicate that Exis should replace current record for the same key value with new data.

"Replace record" is the most common. Use "Delete" for those transactions where you are reloading ALL the records every time you upload data regardless of unique index. "Delete" would be used for open sales orders, open production work orders etc.



Then click on "NEXT" button.

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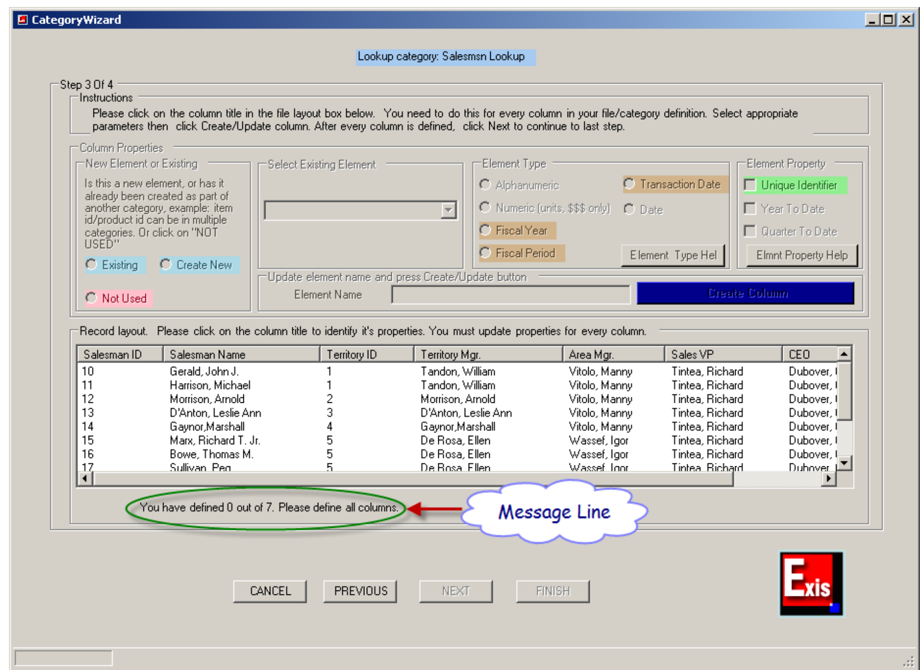
You are now ready to define the columns in the file. Once a column is defined, it becomes an element in ExisOne.

You must define every column of your data. Any data column that you do not want ExisOne use should be tagged as "Not Used".

Please note message line. You will not be able to continue until all columns are defined and there are no errors.



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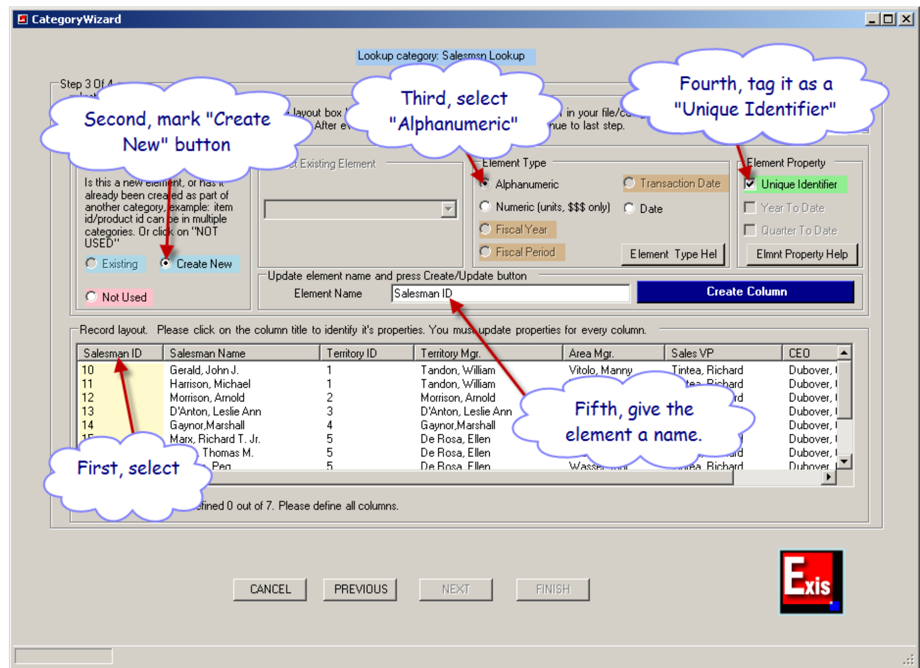
DEFINE COLUMNS

You may define the columns in any order. For now, start with first column "Salesman ID". Since you are starting with a blank database, all elements in this category will be new. In this category they all happen to be alphanumeric. This column, "Salesman ID" is an index (an element that uniquely identifies the salesman) for the record so we will tag it as a "Unique identifier".



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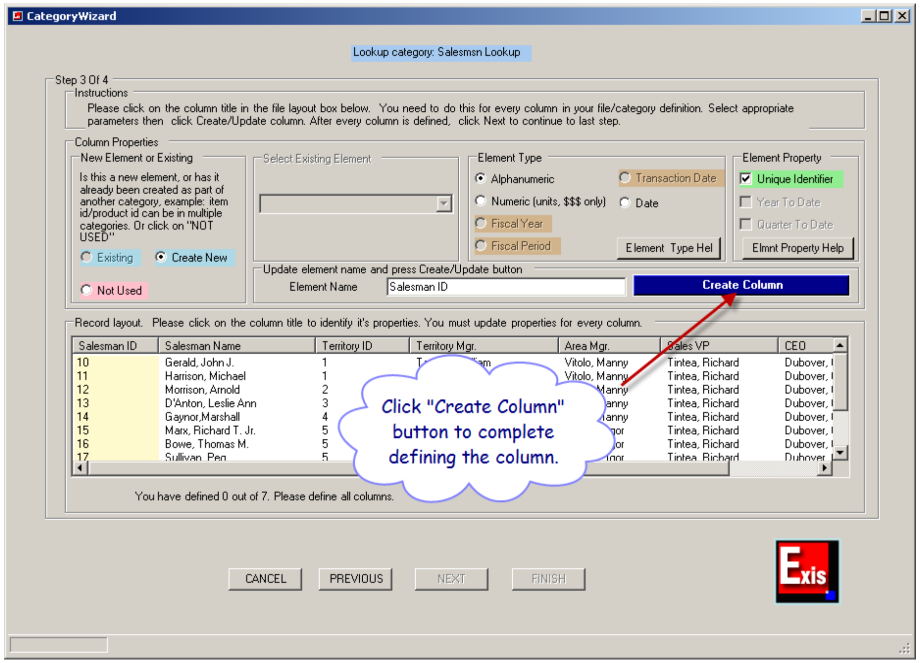
The column definition is not recorded in the database until you click on “Create Record” button. After you click this button, the message line will indicate that you have defined 1 of 7 columns. If you have not defined a unique identifier, or have not defined all columns, the wizard will not allow you to continue.



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Now define the remaining columns as below. You may want to print this page and see instructions on page 24.

Column	Column Property	Element Type	Element Property	Element Name
Salesman Name	Create New	Alphanumeric		Salesman Name
Territory ID	Create New	Alphanumeric		Territory ID
Territory Mgr.	Create New	Alphanumeric		Territory Mgr.
Area Mgr.	Create New	Alphanumeric		Area Mgr.
Sales VP	Create New	Alphanumeric		Sales VP
CEO	Create New	Alphanumeric		CEO

Note:

1. Though Salesman ID and Territory ID have numeric characters, they are not numbers. This is because they can not be used in any mathematical computation. If we had defined them as numeric, ExisOne would not use them as key elements and would not generate information for them.
2. The element property for these elements is blank. This is because, in a lookup table, other then unique identifier, there are no other columns with any special property. Each lookup table must have one and only one unique identifier. The Unique identifier may be made up of one or more columns. For example it is possible that in a product lookup table there may be many records for product "Widget". Also there may be many records for color "Red". But, only one record for Product "Widget" and color "Red".

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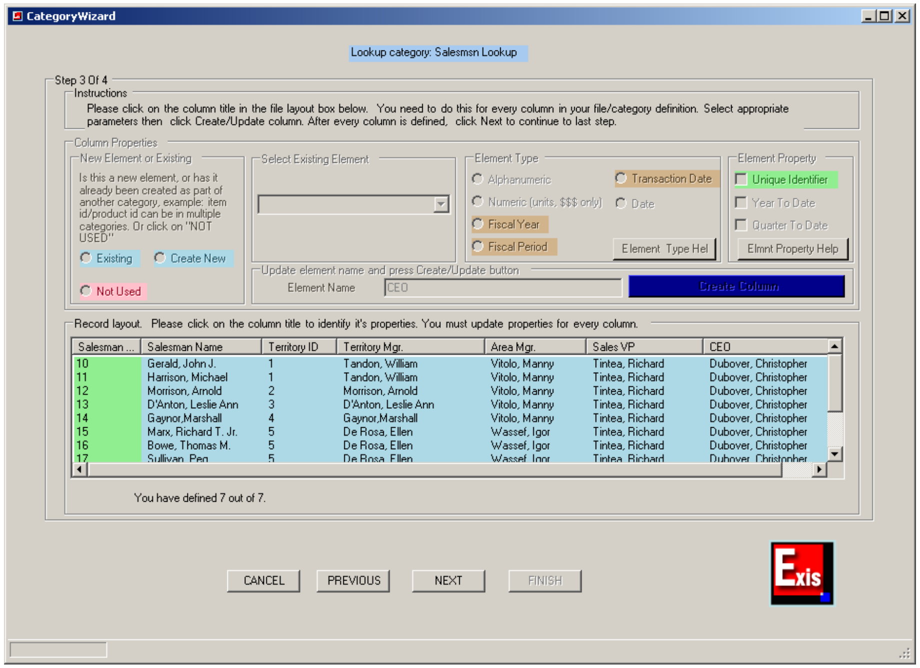
When you have defined all columns, the screen should look like this:



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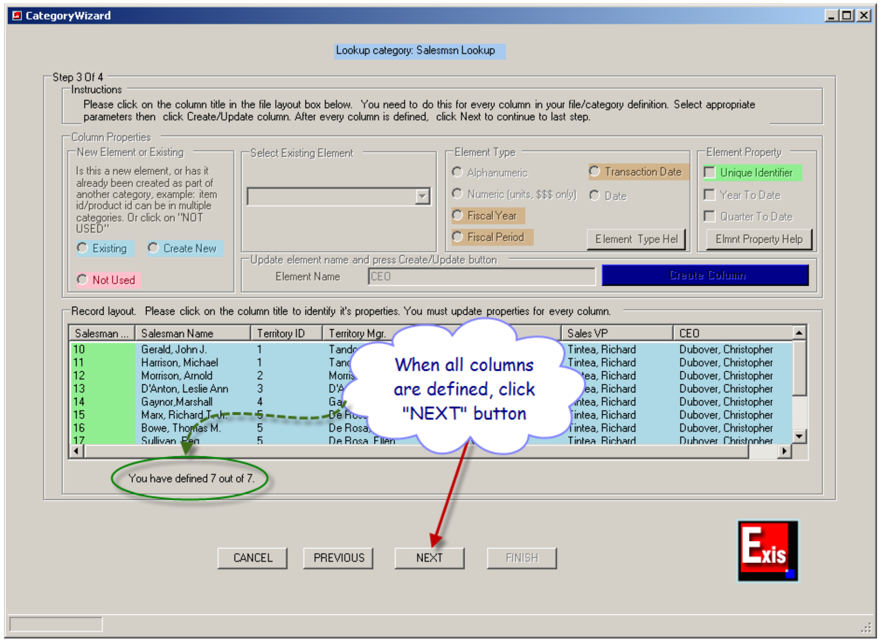
If you have made any mistake, you can correct them by clicking on the column title. You may change a category until you have uploaded data for the category. If all columns are defined correctly, click on the "NEXT" button to continue



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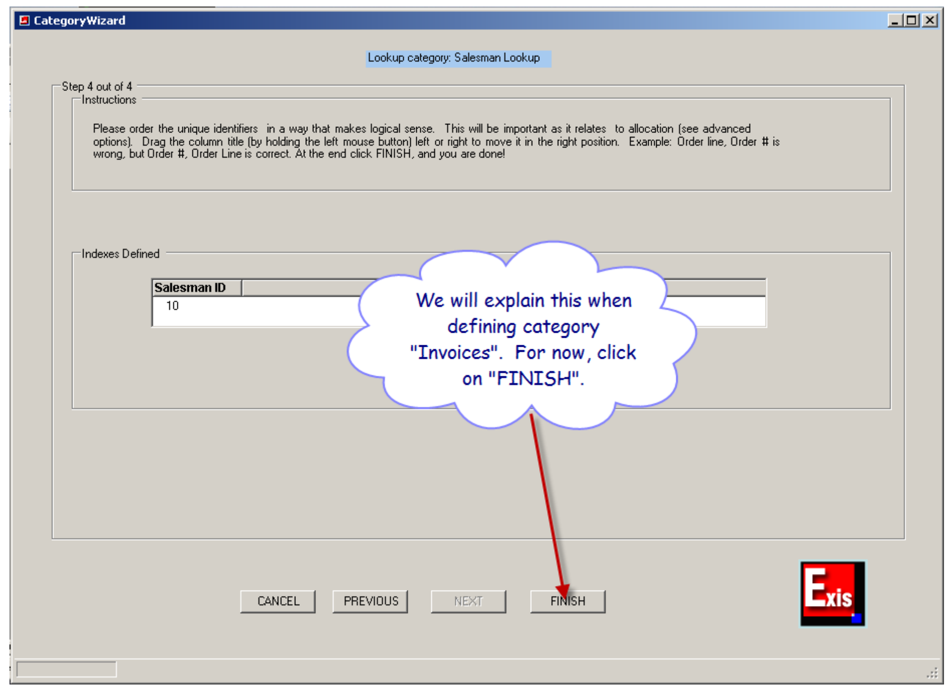
We will explain the purpose for this screen later. For the time being click on the "FINISH" button.



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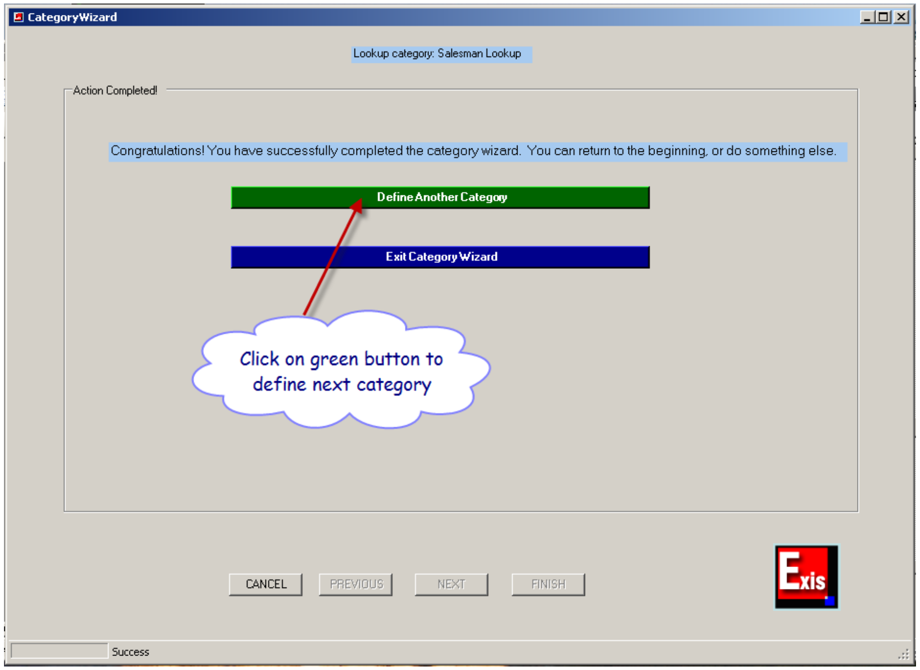
We have defined Salesman lookup category. To continue defining more categories, click on the green "Define Additional Categories" button.



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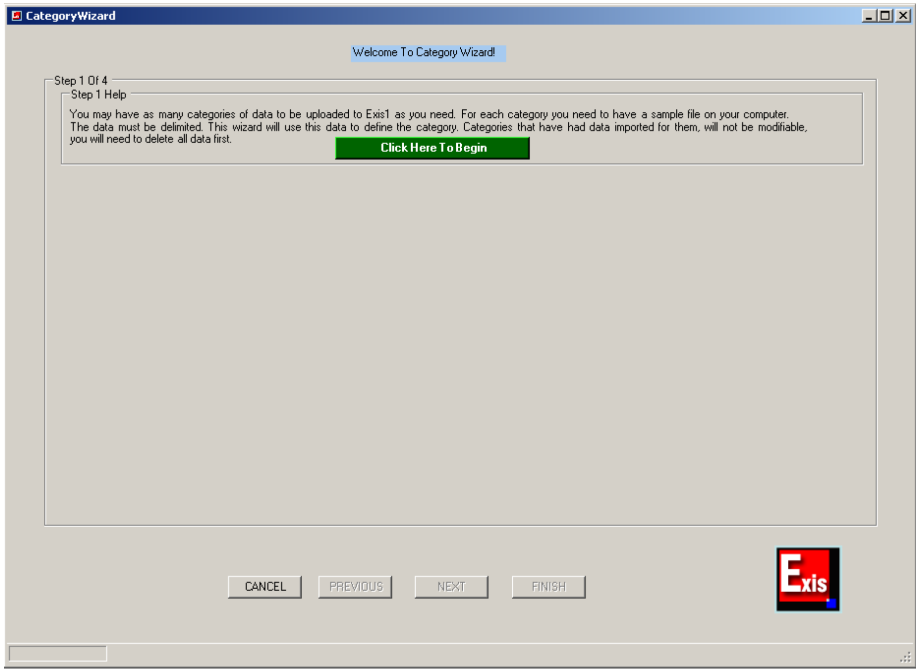
You should be back at step 1 of 4



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Now define the following two lookup categories:

1. File: Sample Product Lookup | Name: Product Lookup | Category Type: Lookup | Replace
    a. Columns data:

Column	Col. Property	Element Type	Element Property	Element Name
Product ID	Create New	Alphanumeric	Unique Identifier	Product ID
Product Name	Create New	Alphanumeric		Product Name
Product Group	Create New	Alphanumeric		Product Group

2. File: Sample Customer Lookup | Name: Customer Lookup | Category Type: Lookup | Replace
    a. Columns data:

Column	Col. Property	Element Type	Element Property	Element Name
Customer ID	Create New	Alphanumeric	Unique Identifier	Customer ID
Customer Name	Create New	Alphanumeric		Customer Name
Parent Customer	Create New	Alphanumeric		Parent Customer

Note: After defining the above lookup categories, click on green "Define Additional Category" to define master file and transaction categories.

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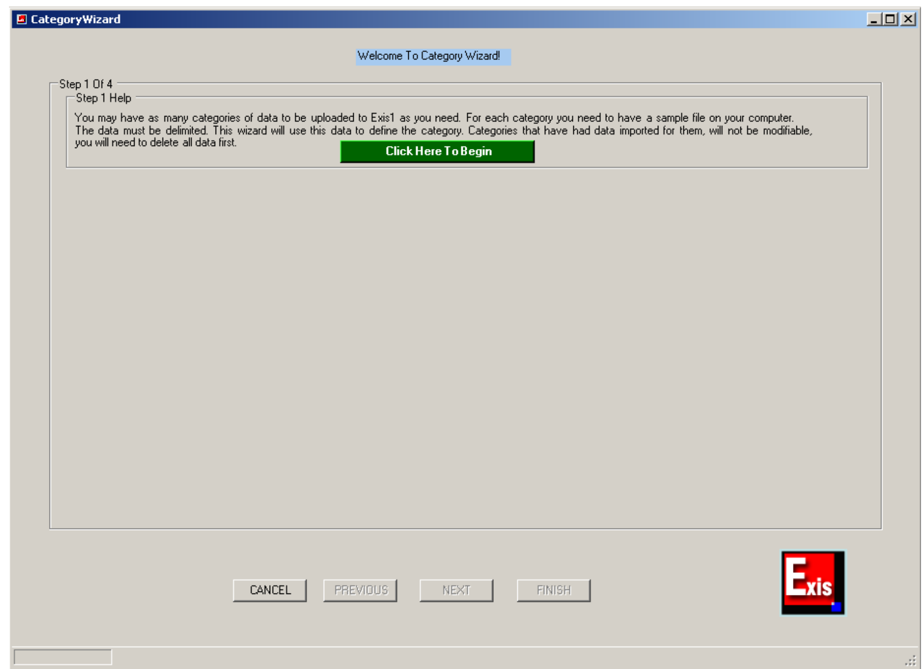

You should be back at step 1 of 4. Next, you will define Product Master.

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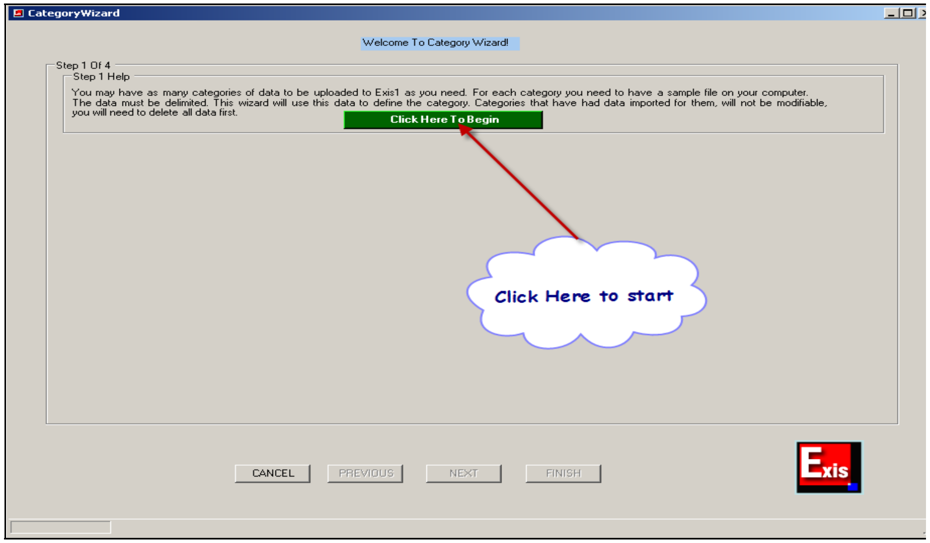
DEFINE MASTER FILES

Again click on the green button to start.



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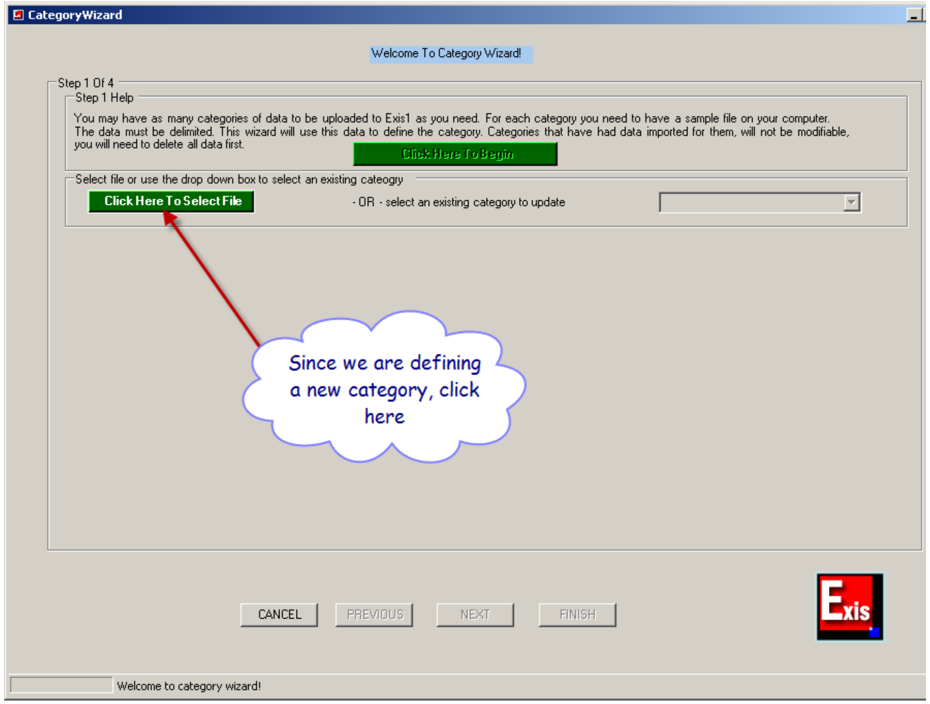
Since, you are defining a new category file, click on button “Click here to select file”.



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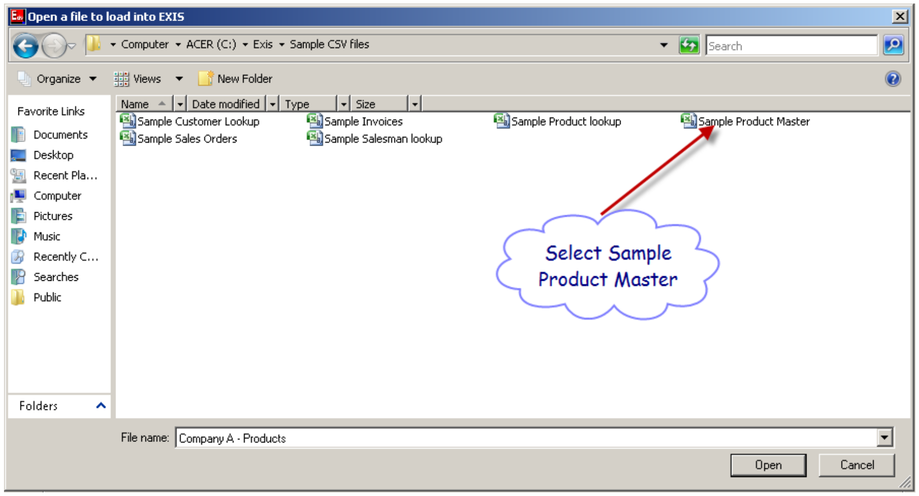
Select Sample Product Master



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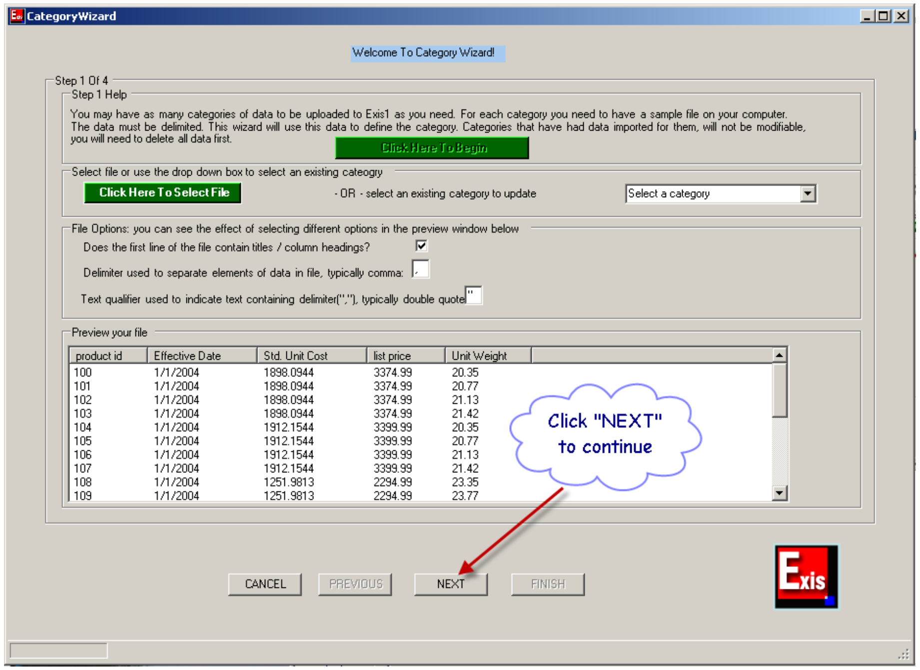
ExisStudio displays a few records from the selected file so that you can verify that correct file is selected. Click “NEXT” button to continue.



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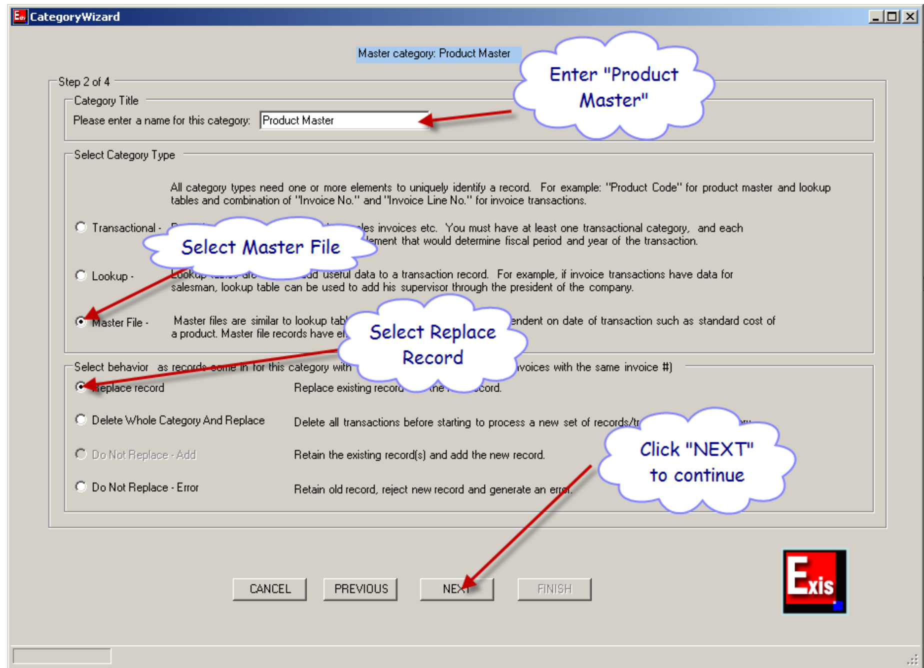
Master file are similar to lookup tables except that master files have effective data. Master files are used when some data varies with date. An example is standard cost for a product which typically changes every year. Enter “Product Master” as the name of the category, select “Master file” as category type and “Replace Record” for behavior. Then, click “NEXT” button to continue.



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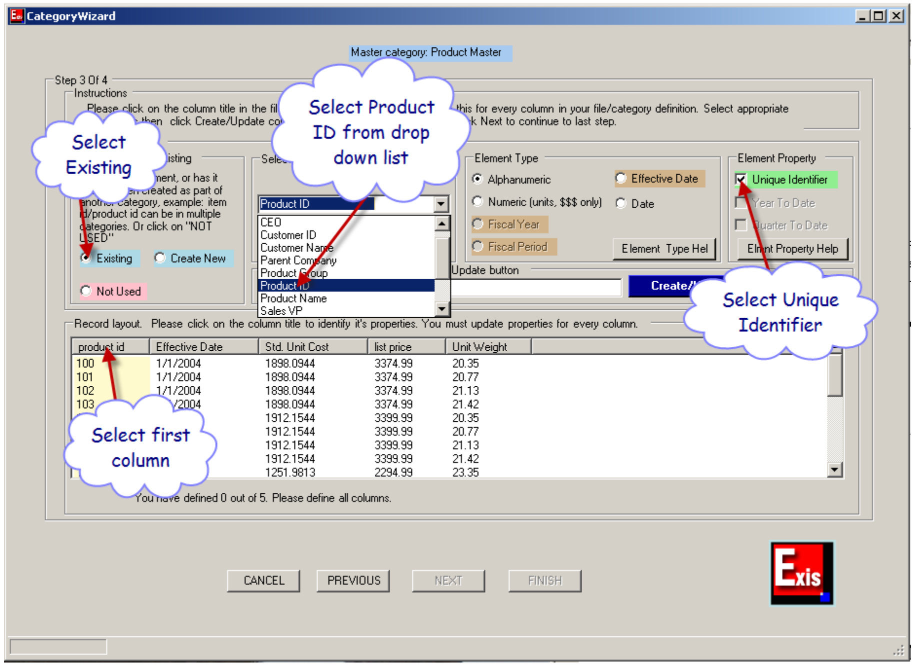
Master files are similar to lookup tables with one exception. A master file must have one column with element type "Effective Date".

You will see a familiar screen. But, this time when you select the first column "Product ID", the remaining selections will be different. Element "Product ID" was defined when you created "Product Lookup". So, instead of "Create New" you need to select "Existing" and then select "Product ID" from the drop down list. Element type should be already checked. .Unique Identifier property is category specific rather than element specific. Hence, you need to check that as well. When done, click on blue "Create/Update …" button to finish defining the first column.



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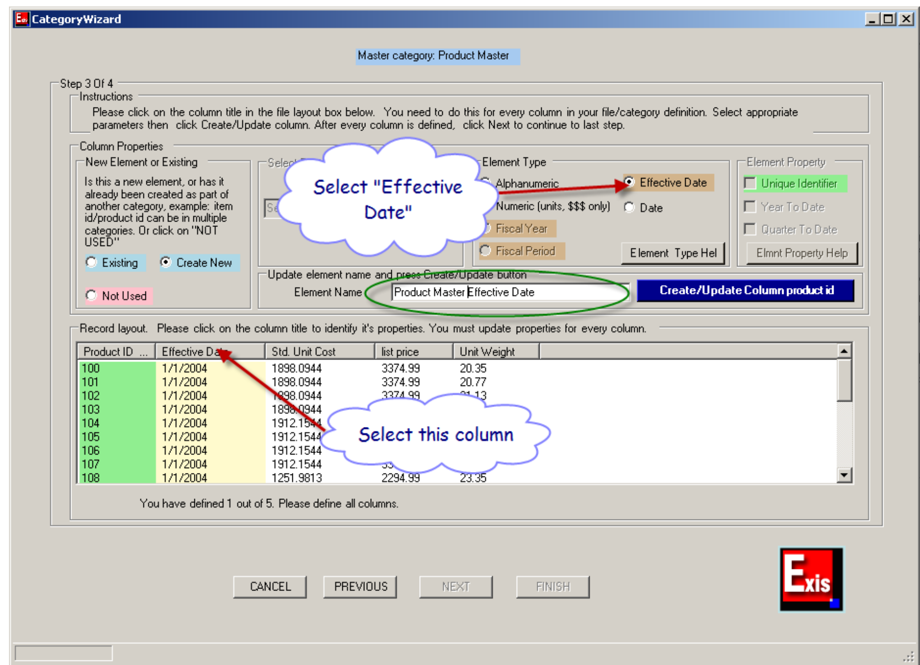
Master files must have one column that is "effective date". In the product master file, the second column is "effective date". ExisStudio will not allow you to proceed to next screen until you have defined all columns. For Master files you must have one "effective date" column. .



Note the element name. Just to point out that it need not be the same as the column title in input file, this time change the name as shown in green circle.

Click "Create/Update …" to continue with next column. Note the color of the column after "Create/Update" and the color in element types.

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Now define the remaining columns as below. You may want to print this page and see instructions on page 24.

Column	Column Property	Element Type	Element Property	Element Name
Std. Unit Cost	Create New	Numeric		Std. Unit Cost
List Price	Create New	Numeric		List Price
Unit Weight	Create New	Numeric		Unit Weight

After you have created the Product Master category, click on button to define another category.

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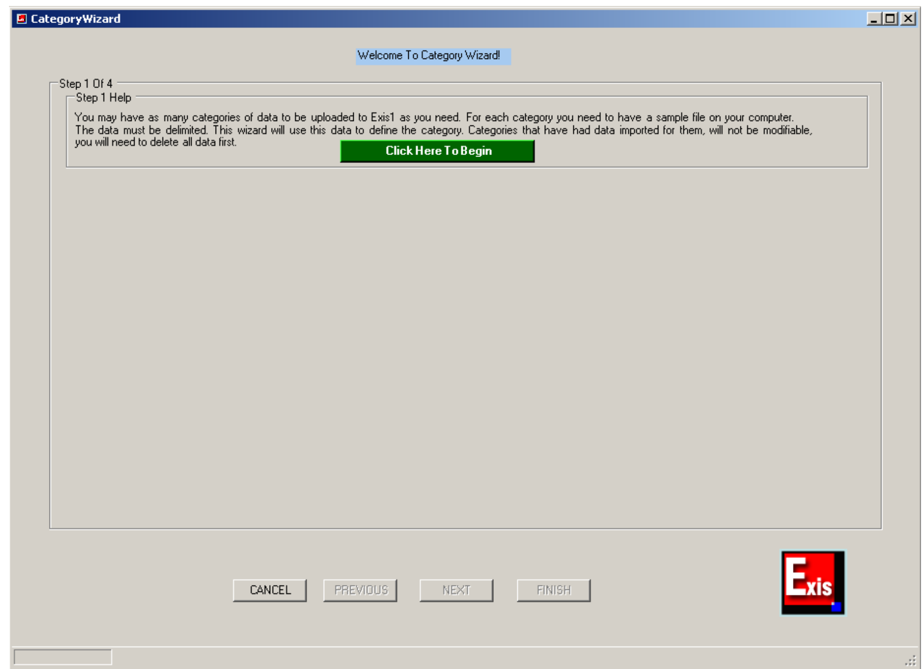
Now that all lookup table and master file categories are defined, you are ready to define transaction categories.

You should be back at step 1 of 4. Next, you will define Invoices category. Lookup tables and master files augment transactional data. Typically transaction data such sales invoices will have the salesman responsible for the sale. But, it is quite rare that it would have any information for his/her superiors or standard cost of products. ExisOne will augment transactional data with data from lookup tables and master files.

Click on the green button to start. Defining transactional categories.



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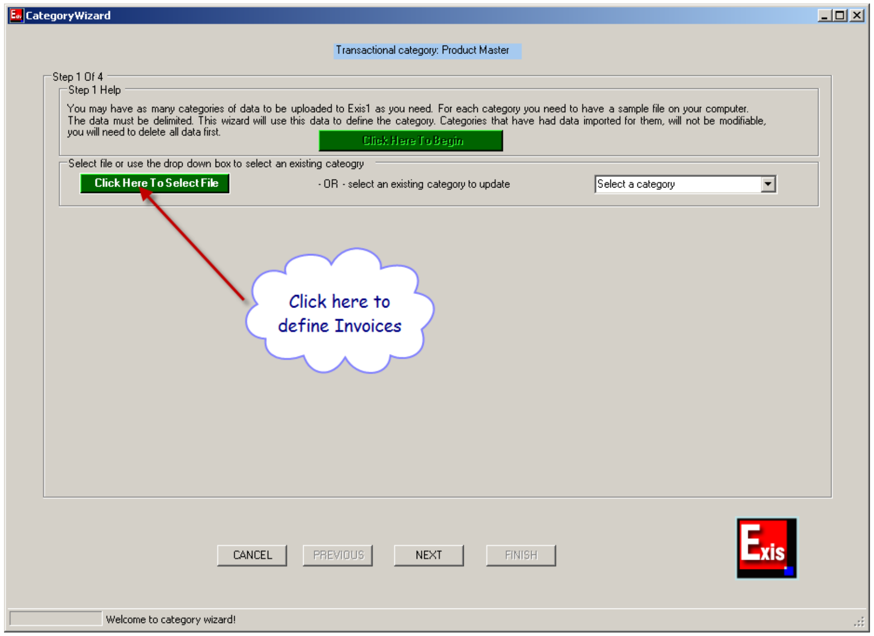
Define Transactional Data

All of the lookup tables and one master file are now defined and you are now ready to define transactions.



Transactional data are most significant for business intelligence. They constitute a huge bulk of data for most companies. Unlike lookup tables and master files that change occasionally, transactional data is generated daily. We recommend that you start with only one or two transactional categories; typically sales invoices and sales budgets. As you become more familiar with ExisOne, you should consider adding more transactional categories such as sales orders, shipments, production plans, production and purchase orders.

For this test data, you will next define Invoices category.

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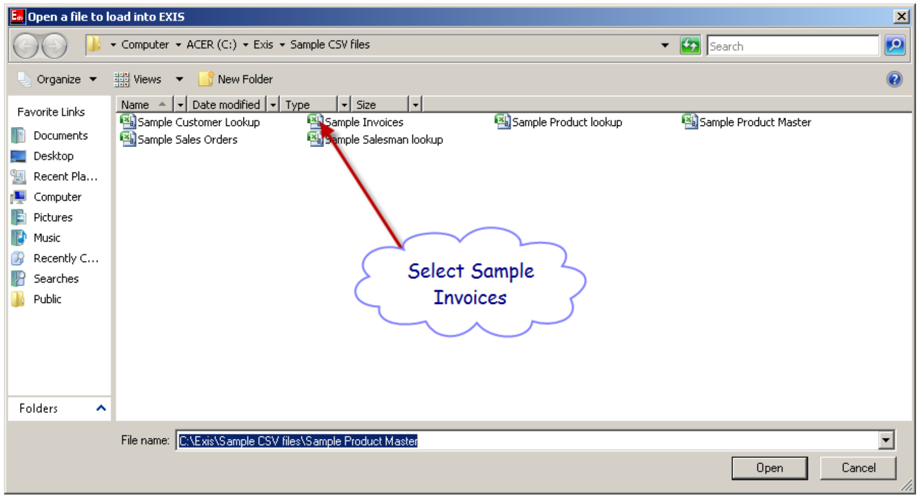
There are two files with transactional data, Sample Invoices and Sample Sales Orders. Select “Sample Invoices”.



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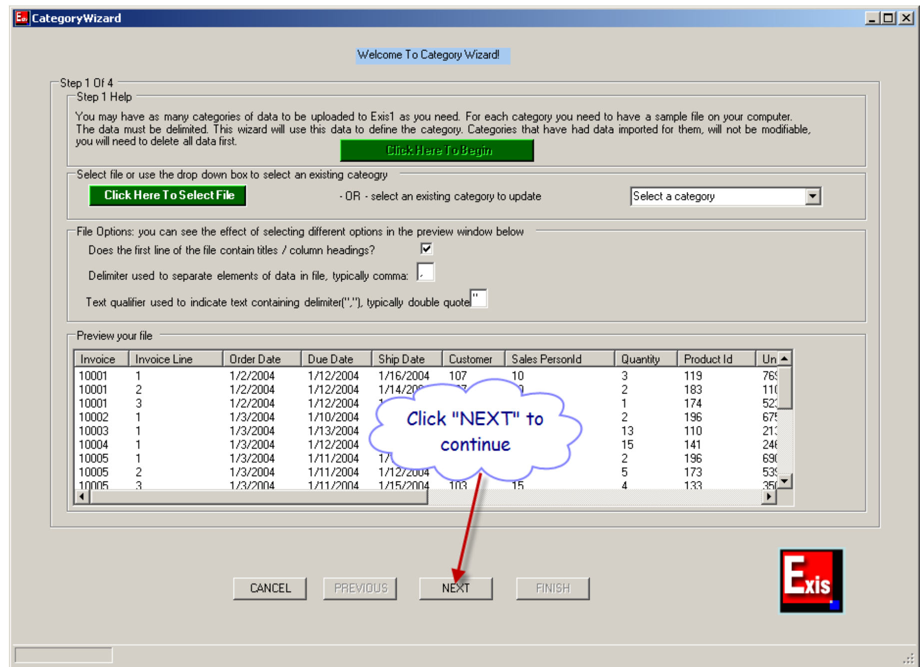

Just as before, you are shown a few records from the selected file. Click “NEXT” button.

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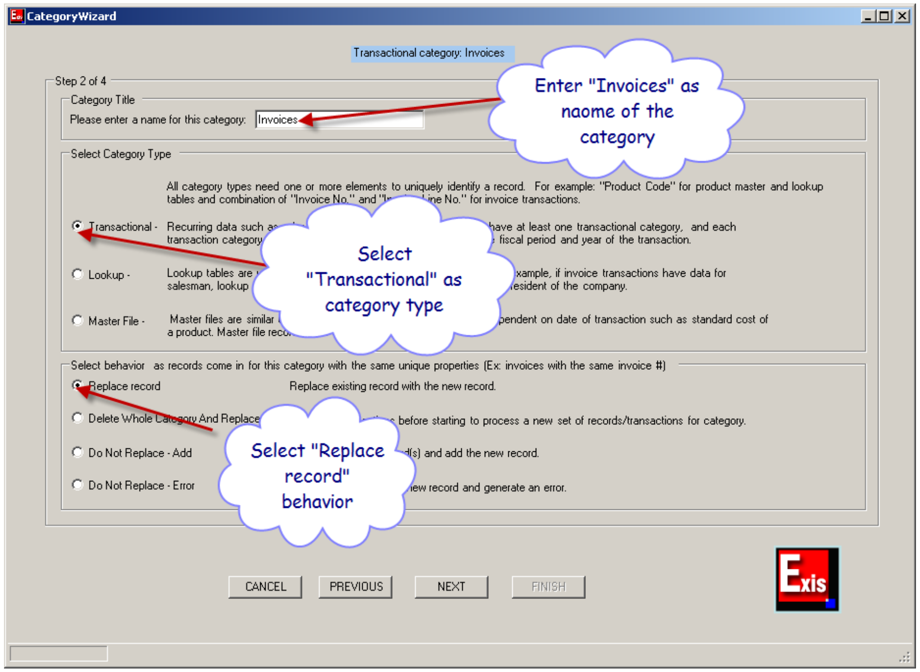
Enter “Invoices” as category name; check “Transactional” as category type and “Replace Record” as behavior.



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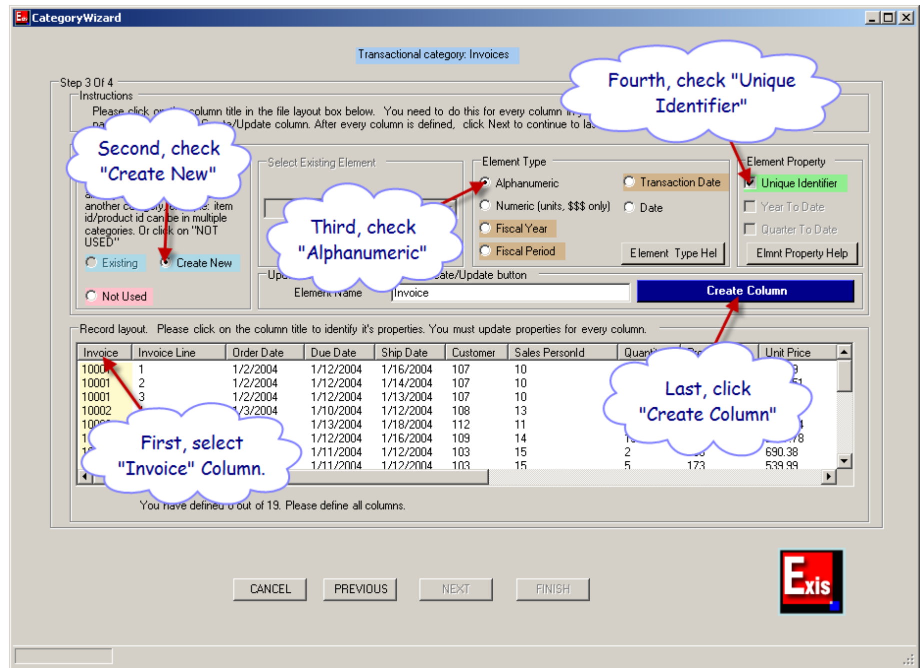
You should see this screen. You are now ready to define all columns.

Select first column. Check “Create New”, “Alphanumeric” and “Unique Identifier”. Last, click on “Create Column” button.



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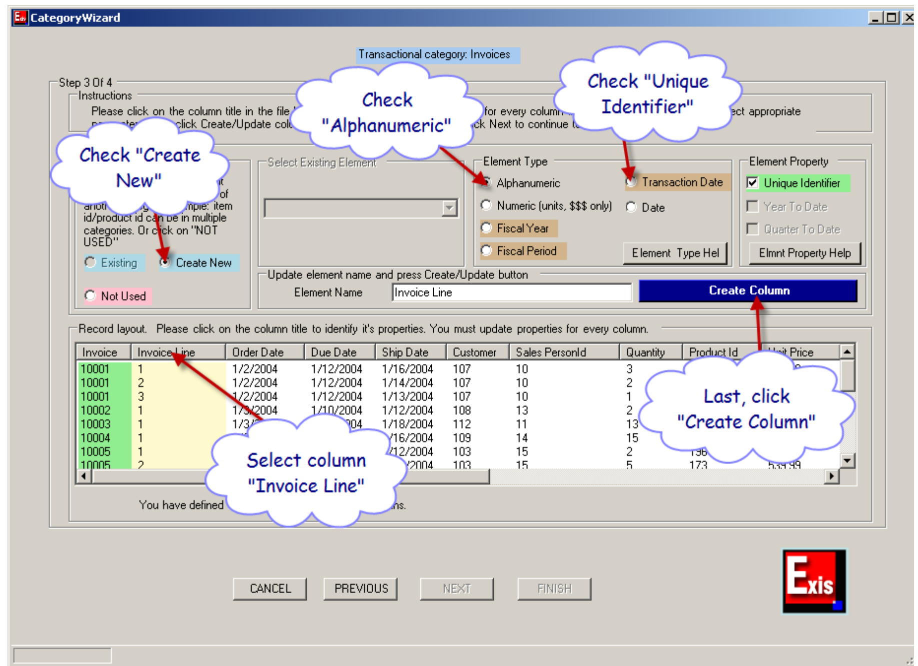
Note in the sample data that the first three records all have the same invoice number. Thus, invoice number by itself is not unique identifier for the category. But, combination of invoice number and the invoice line does uniquely identify a record. You may have one or more columns to create "Unique identifier". And, they need not be adjacent.

Now, select second column "Invoice Line", "Create New", "Alphanumeric" and "Unique Identifier". Leave the element name as displayed. Then click the blue button, "Create Column".



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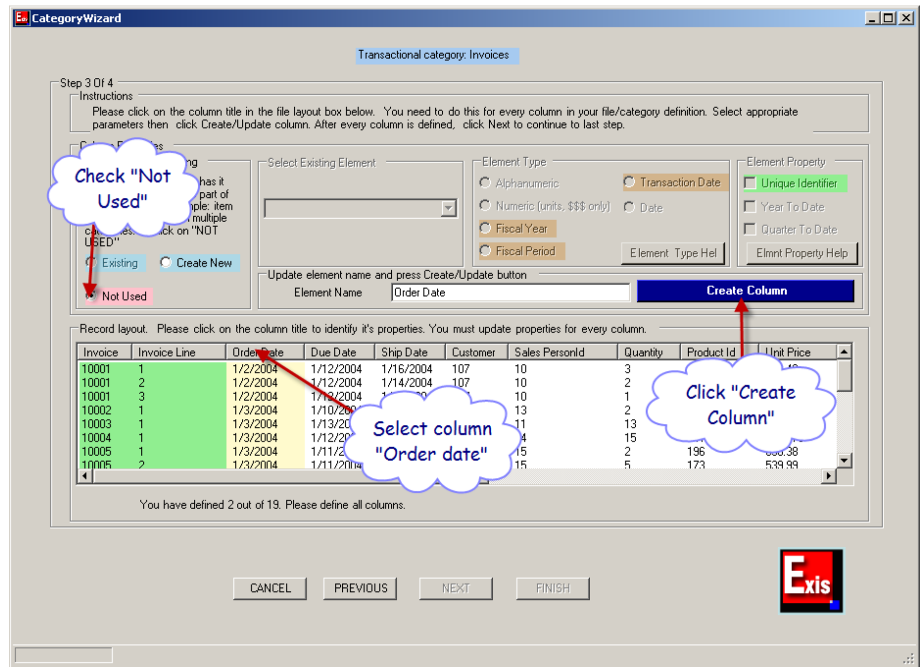
Often, a transaction record may have columns you do not want to use in a business intelligence system. ExisOne does not require that you use all columns in a record. But, it does require that you define all columns. If a column is not going to be used, check “Not Used”.

Select column three. Check “Not Used” and click “Create Column” button.



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Now define the remaining columns as below. You may want to print this page and see instructions on page 24.

Column	Column Property	Element Type	Element Property	Element Name
Due Date	Not Used			
Ship Date	Not Used			
Customer	Existing			Customer ID
Sales PersonId	Existing			Salesman ID
Quantity	Create New	Numeric	YTD, QTD	Qty Sold
Product Id	Existing			Product ID
Unit Price	Create New	Numeric		Unit Price
Sales $	Create New	Numeric	YTD, QTD	Sales $
Weight	Create New	Numeric	YTD, QTD	Weight
Freight	Create New	Numeric	YTD, QTD	Freight
Invoice Date	Create New	Transaction Date		Invoice Date
Count	Not Used			
Date Paid	Not Used			
Shipped Late	Not Used			
Days Inv Paid	Not Used			
AR Unpaid	Not Used			

Please see the notes on the next page.

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Note that for some elements "Year to Date" and "Quarter to Date" boxes are checked in element property. This option is available only for numeric elements in a transaction type category. When they are checked, ExisOne will automatically track YTD and QTD values for these elements. YTD and QTD are not checked for unit price because adding up price(s) is meaningless.

For previously defined elements (in an already defined category), the element type is copied by ExisOne. Remember, that you select the existing element from the drop down menu.

After you have defined all columns, click "NEXT" button to continue.

You should see the following screen:

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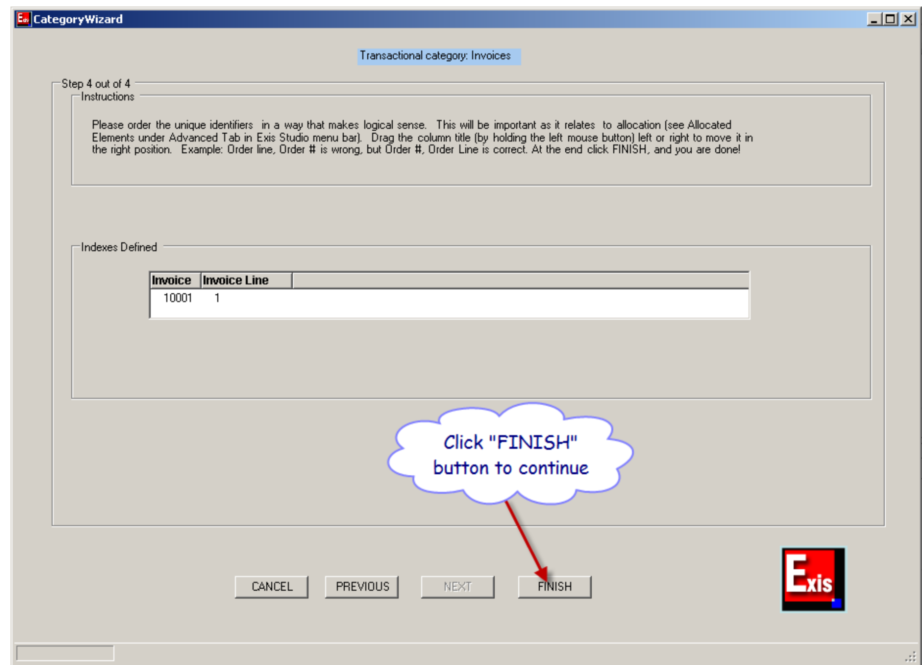
Since the unique identifier has two elements, it is essential that they are in proper order. This will be evident when we cover allocated elements. In this example, they are already in a correct order. So, you are finished. If the elements were in the wrong order, you can re-order them by positioning the mouse pointer on the column title of the element to be moved and dragging it left or right while holding the left button down.

Click "FINISH" button.



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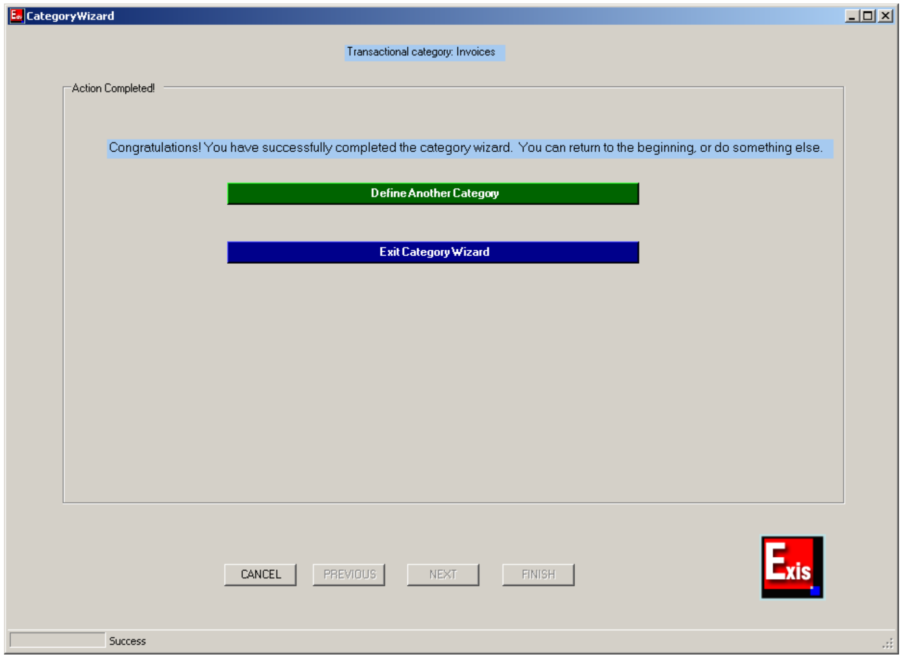
Click on the green button to define the last category.



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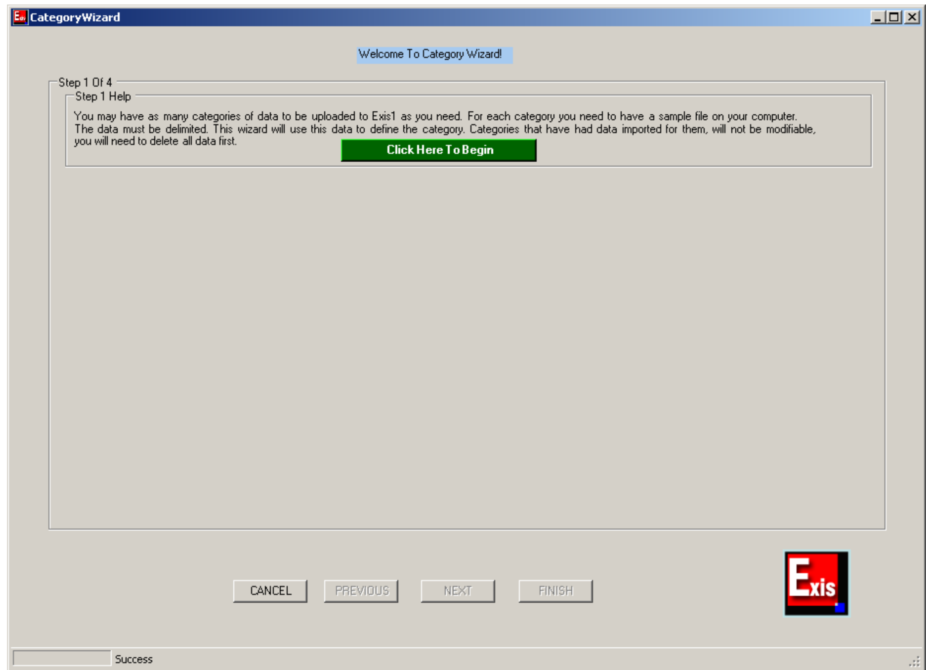

Click the green button.

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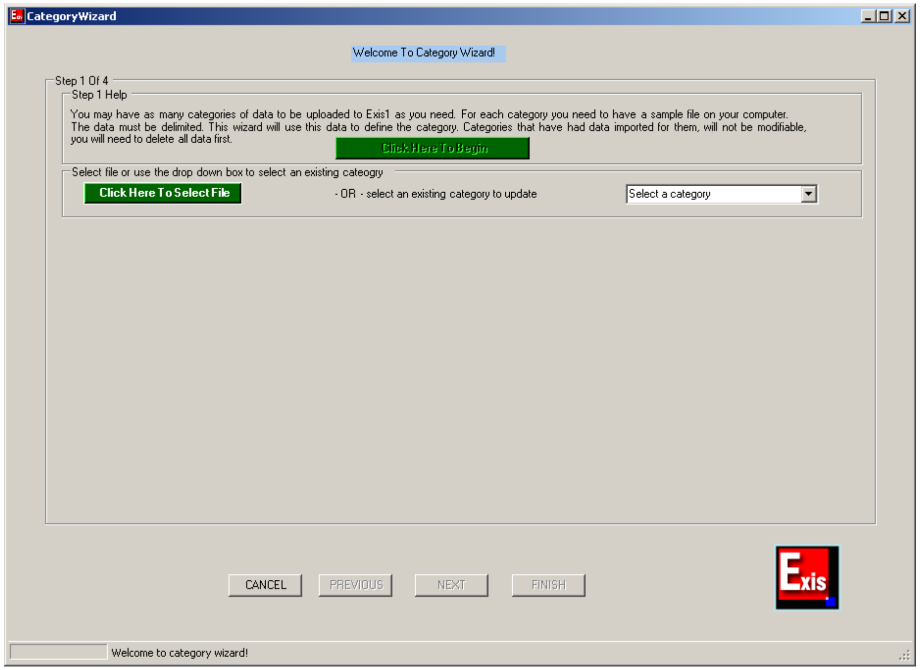
Click “Click here to Select File” button.



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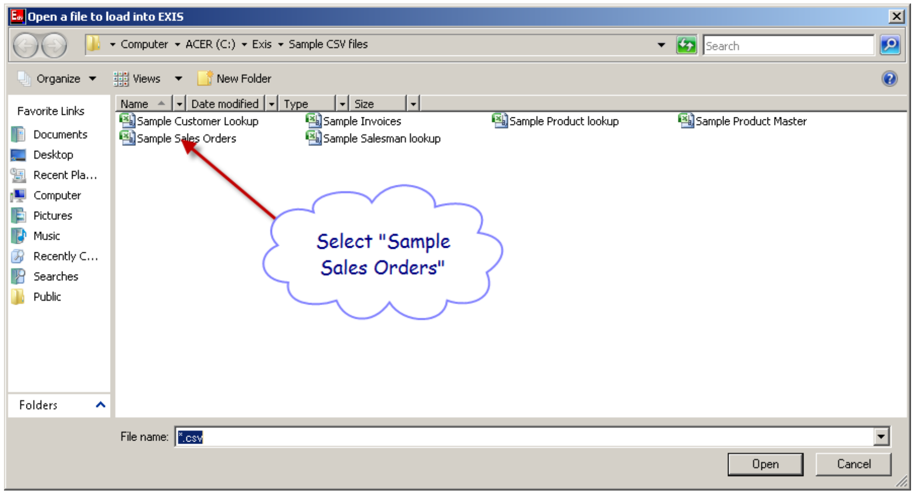
Select “Sample Sales Orders”.



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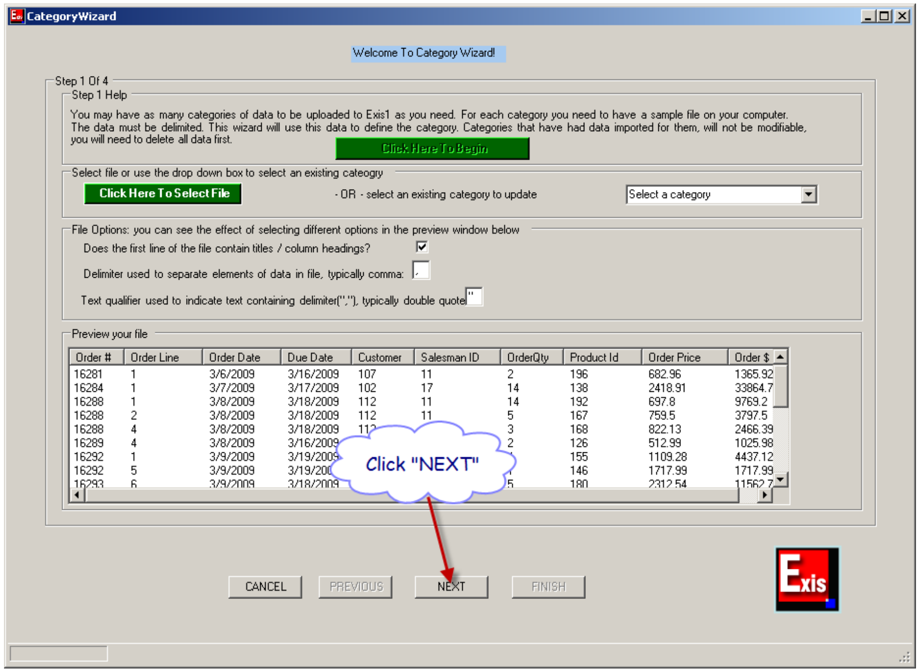
Click “NEXT” button to continue.



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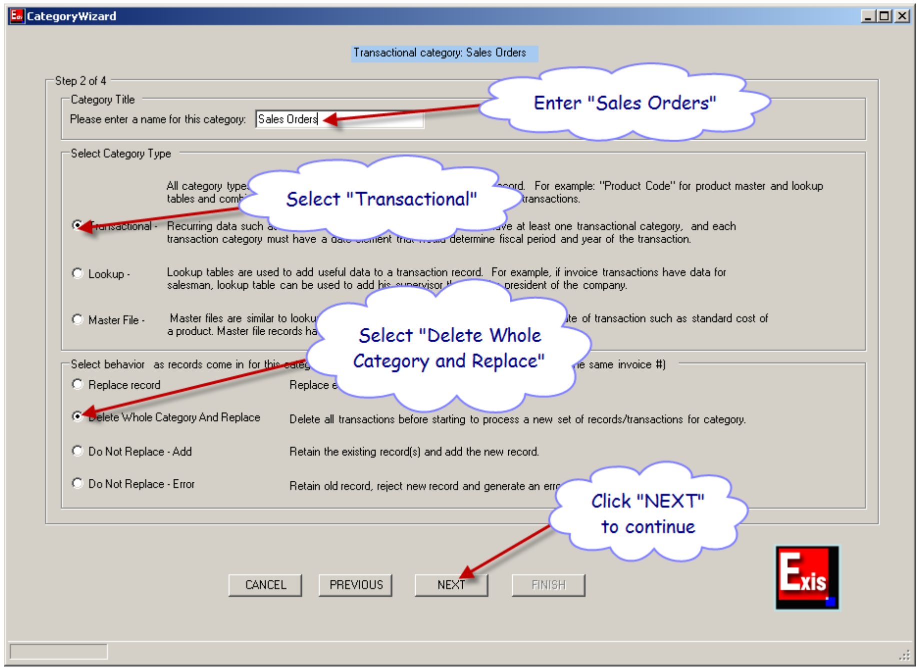
An invoice is a record of products sold. The invoice data is valuable even after it is closed after it is paid. The data in a sales order is useful until it is shipped and invoiced. It is not uncommon that a sales order is changed or cancelled before it is shipped and invoiced. ExisOne supports this transitory type of transactions. Note that this category's behavior is tagged as "Delete Whole Category and Replace". This indicates that each time sales orders are uploaded, all open sales orders will be uploaded. ExisOne will remove prior data of open orders and replace with latest open orders data.



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Now define all columns of category "Sales Orders" using the following column definitions. You may want to print this page and see instructions on page 24.

Column	Column Property	Element Type	Element Property	Element Name
Order #	Create New	Alphanumeric	Unique Identifier	Order #
Order Line	Create New	Alphanumeric	Unique Identifier	Order Line
Order Date	Create New	Date		Order Date
Due Date	Create New	Transaction Date		Due Date
Customer	Existing			Customer ID
Sales Person Id	Existing			Salesman ID
Order Qty	Create New	Numeric	YTD, QTD	Order QTY
Product Id	Existing			Product ID
Order Price	Create New	Numeric	YTD, QTD	Order Price
Order $	Create New	Numeric	YTD, QTD	Order $

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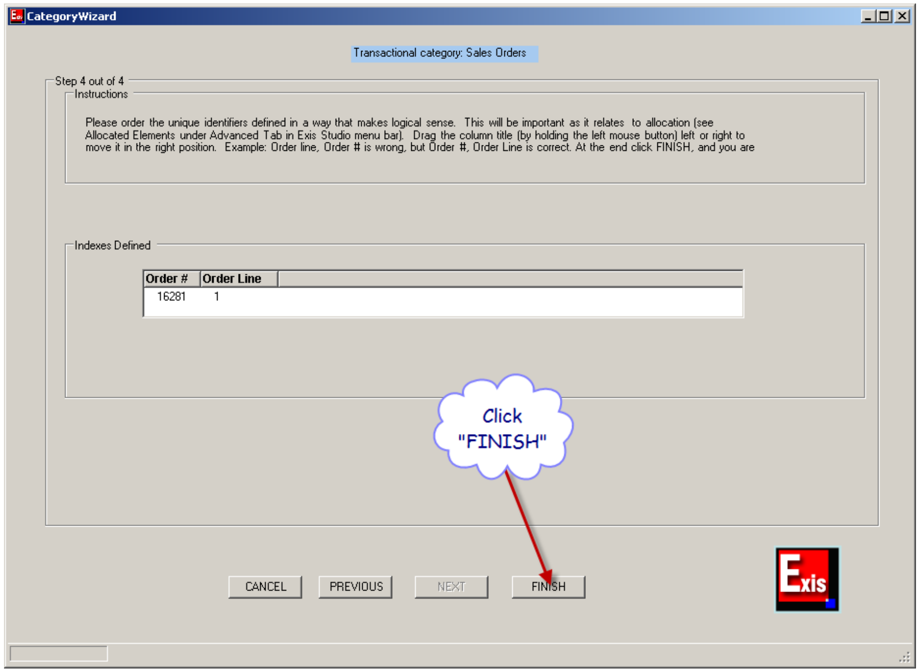
After all the columns are defined, click the "NEXT" button. You should be at this screen. Verify that "Order #" and "Order Line" are in the correct order, then click "FINISH" button.



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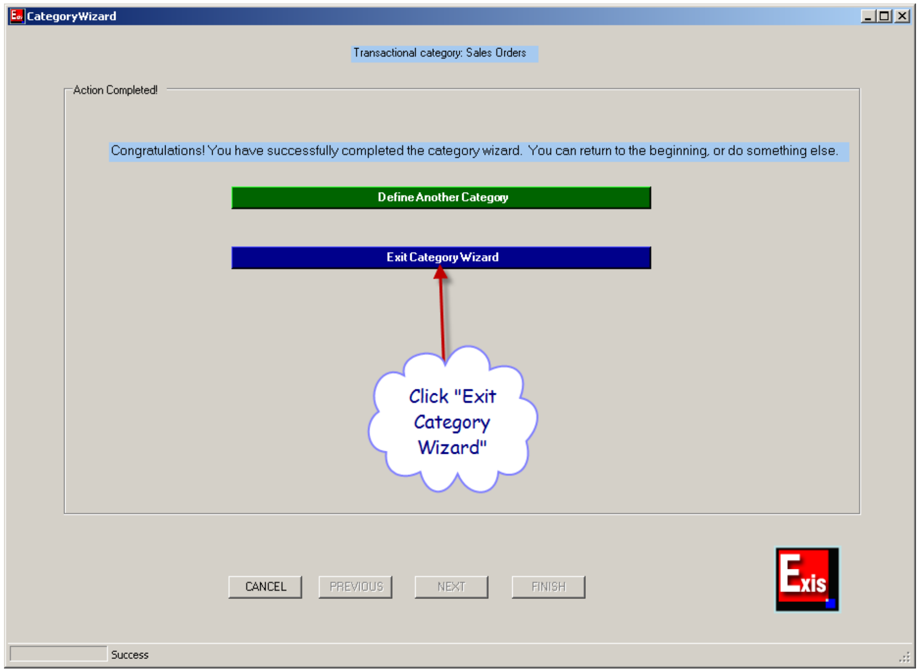
Now that all categories are defined, click “Exit Category Wizard” button.



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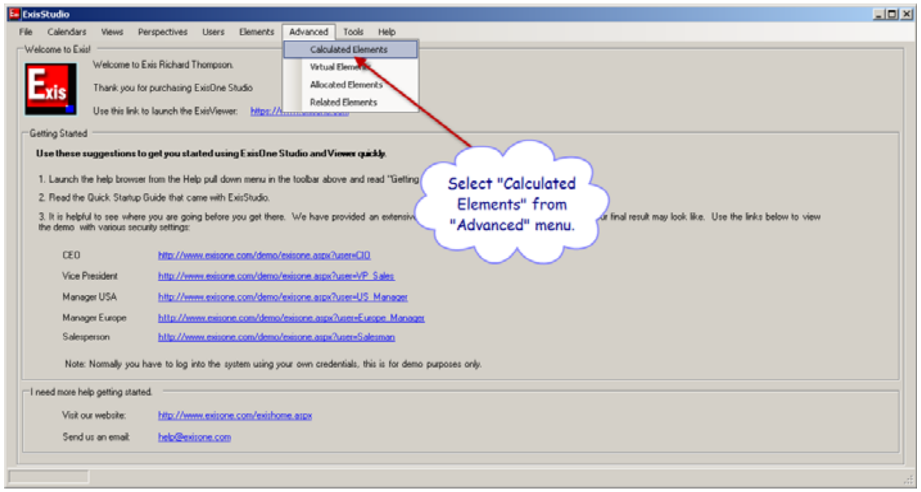
CALCULATED ELEMENTS

It is sometimes useful to add element(s) to a category by calculating from other elements in the category. ExisOne provides for three different types of elements that are calculated from other elements. For now, you will create calculated element that will extend the elements in "Invoices" category.

Start ExisStudio. Select "Calculated Elements" from "Advanced" menu.



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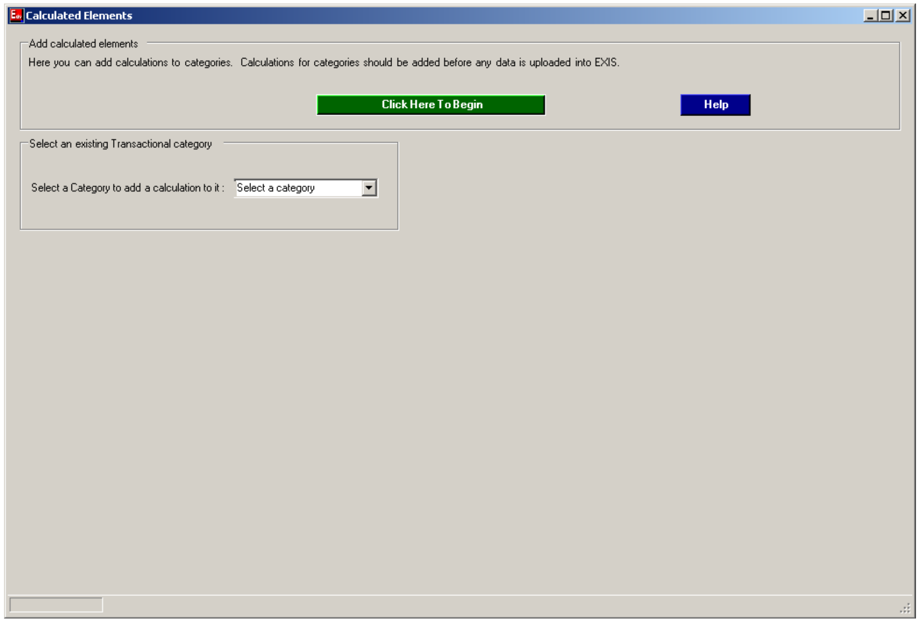

After you click on green button “Click Here to Begin”, you should see this screen.

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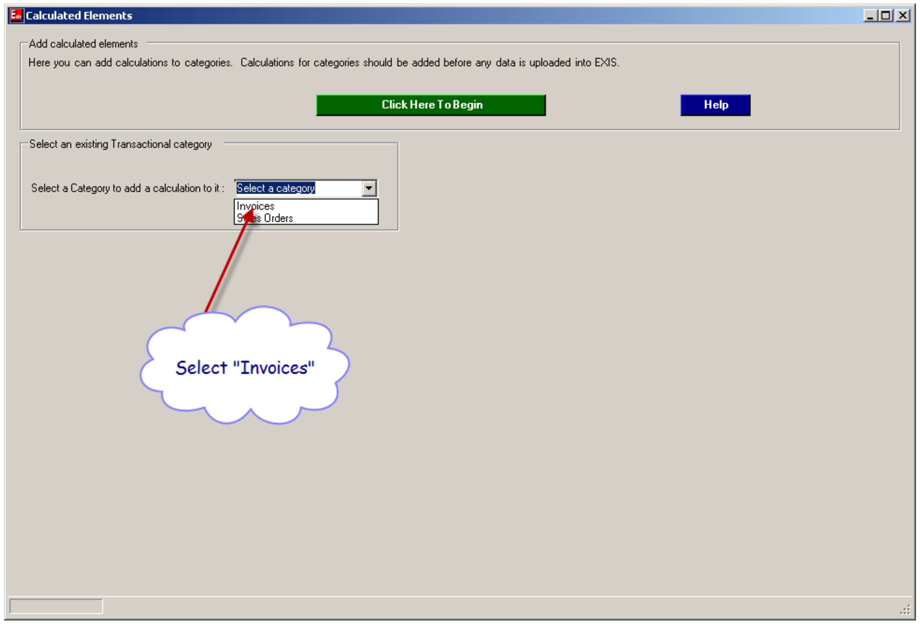
Select “Invoices” category.



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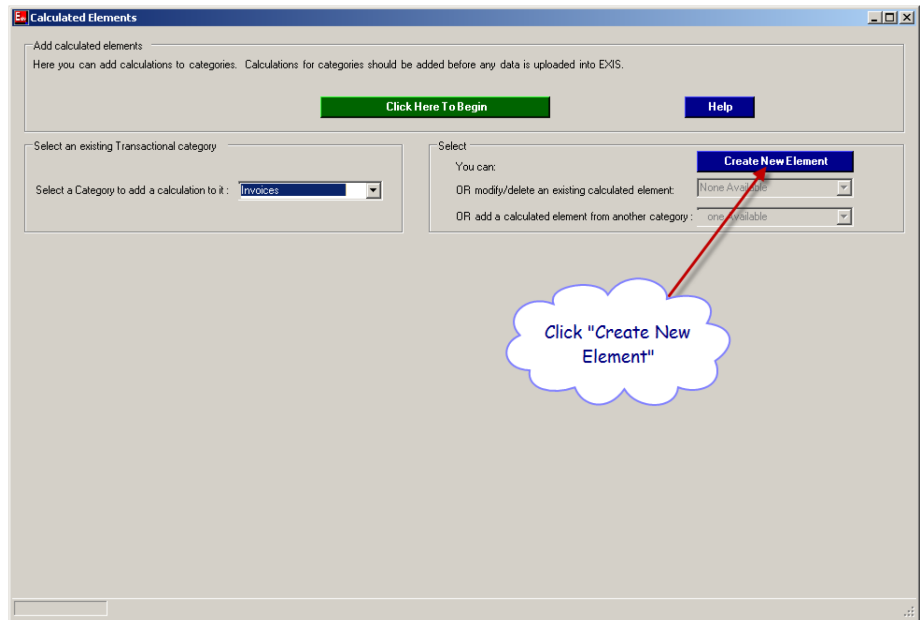
Now select "Create New Element". If there are any already defined calculated elements, you can select one to modify.



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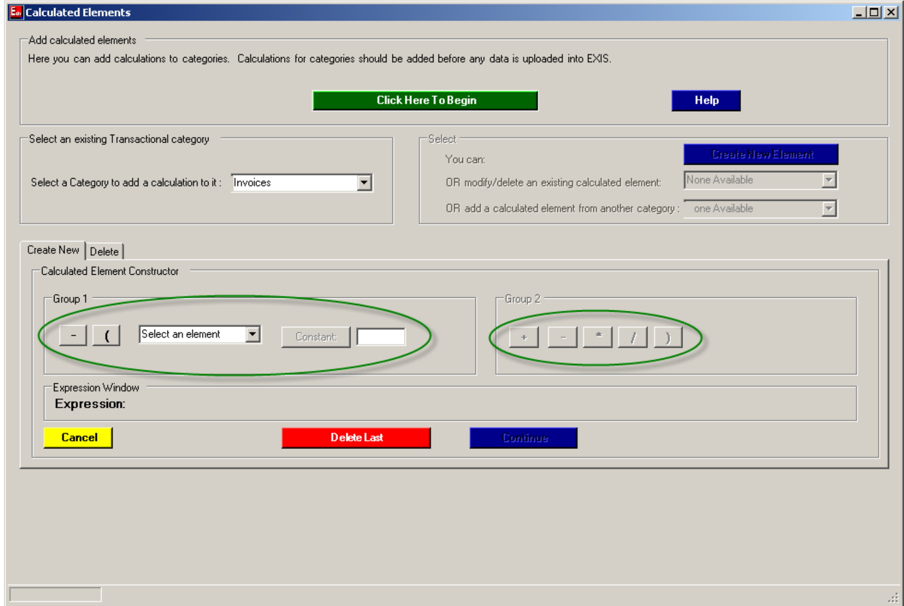
EXPRESSION BUILDER

Now you will see a box where you build an expression. Note that there are two groups. Group 1; where you can select either open parenthesis"(", an element, or a constant number. Group 2; where you can select either an arithmetic operator from plus"+", minus"-", multiply"*", and divide"/" or close parenthesis")". To maintain integrity of the expression, the expression builder allows choice from only one group at a time.

Only the elements in the category are available for the expression.



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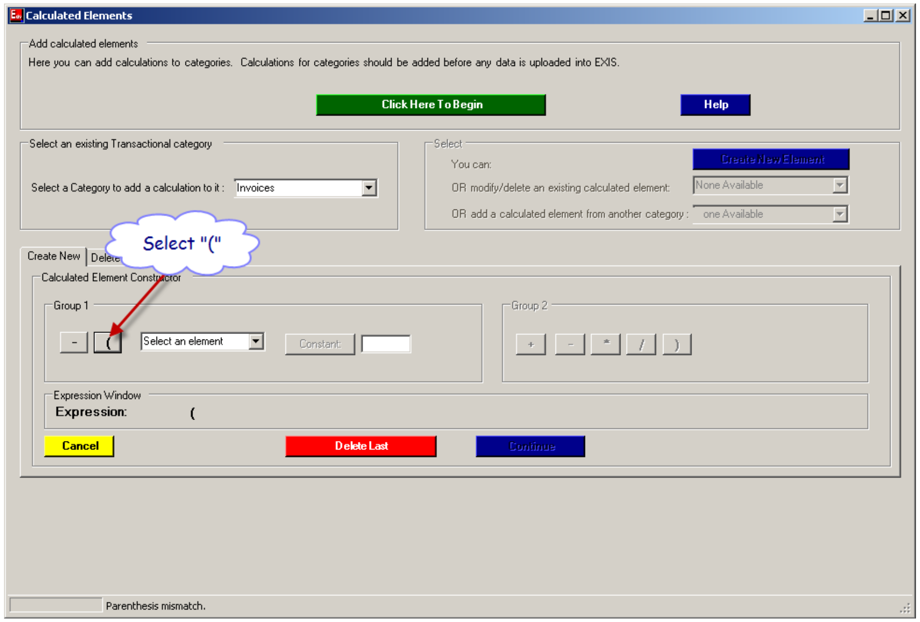
You are going to build an expression to compute the contribution margin. Expression is (Unit Price – Std. Unit Cost) * Qty Sold. Select “(” from group 1.



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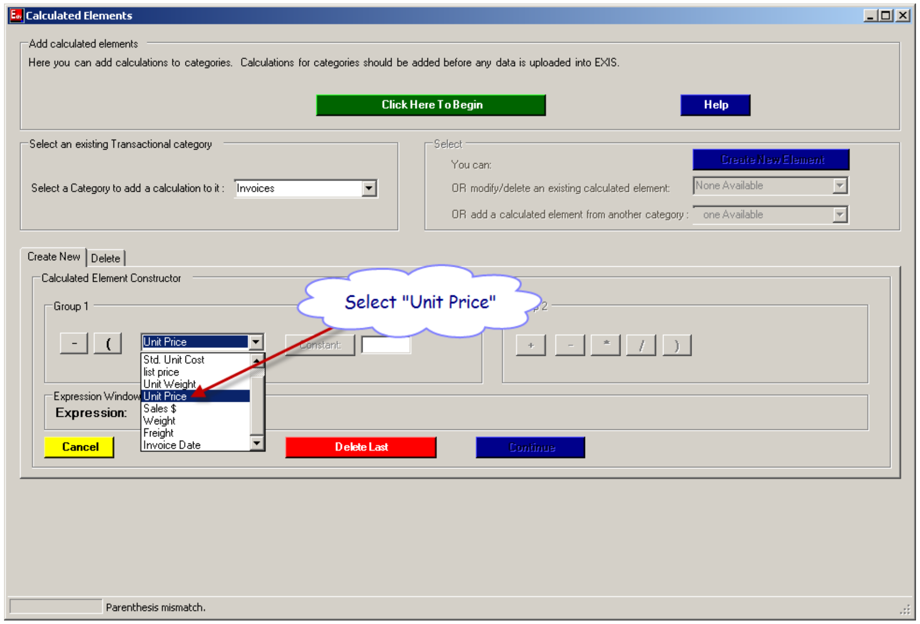
Note that you can select only from group 1.

Now select element "Unit Price" from the drop down list of elements.



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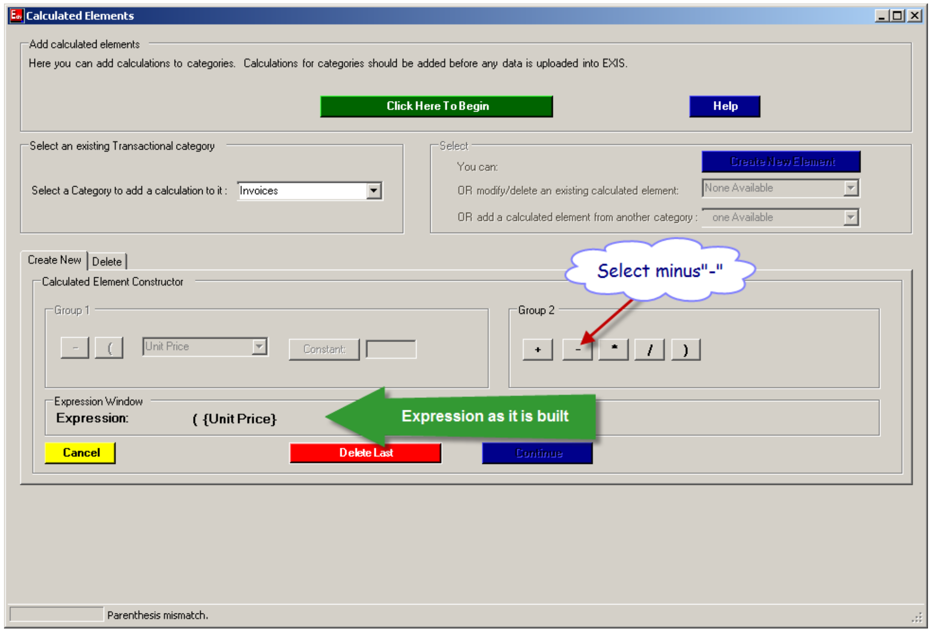
Note that expression window displays current state of the expression as you add to the expression; Also now only choices from group 2 are available.

Now select minus "-" from group 2.

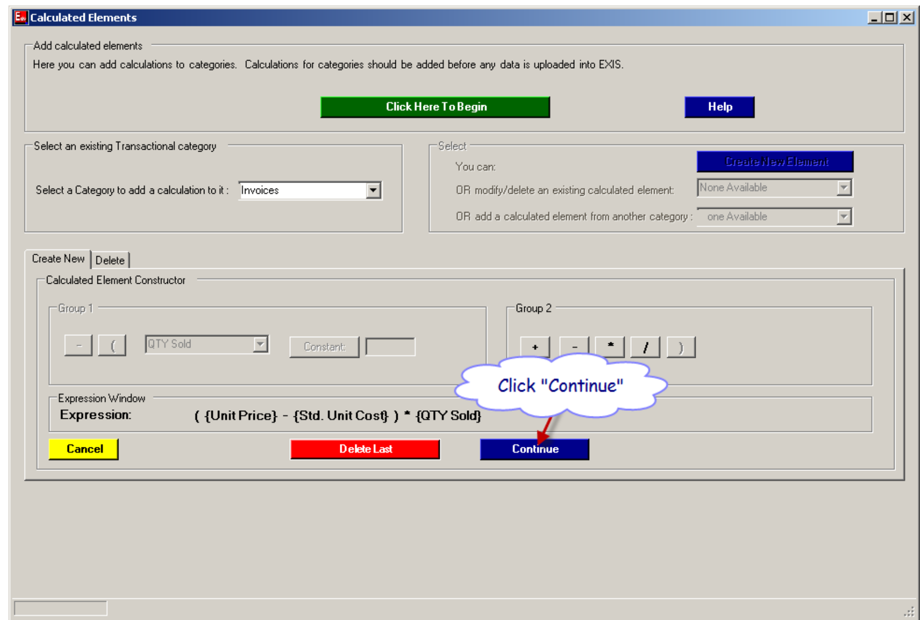


Add following to the expression:

1. Element "Std. Unit Cost" from group 1
2. Close parenthesis")" from group 2
3. Multiply"*" from group 2
4. Element "Qty Sold" from group 1

Note that even though "Std. Unit Cost" is not in the "Invoices" category, it is available. That is because; ExisOne date warehouse fetches it from "Product Master" and adds it to the elements in the "Invoices".

Expression is now completed. Click "Continue" button.



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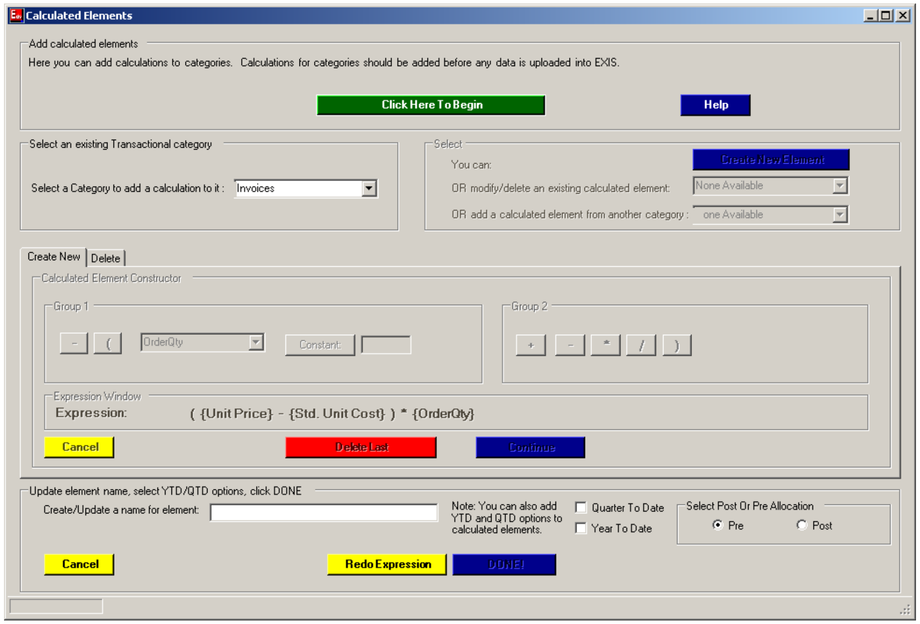
You should now see this screen where you name this new element and define it. Go to next page.



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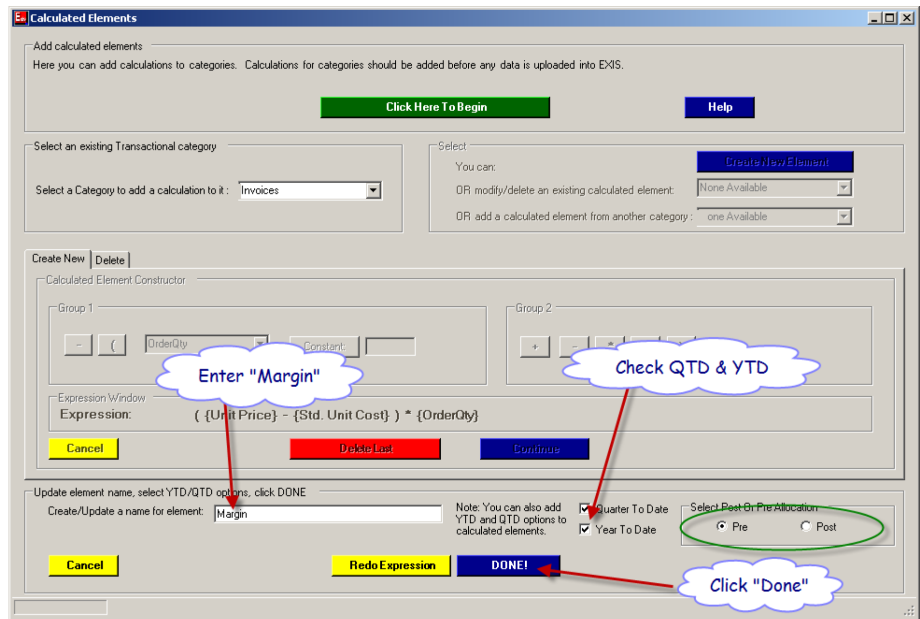
Enter:

1.. “Margin” element name
2. Check “Quarter to Date”
3. Check “Year to Date”

We will explain “Pre” and “Post” allocation in “Allocation” section.

The element is now defined. Click “Done” and close “Calculated wizard”



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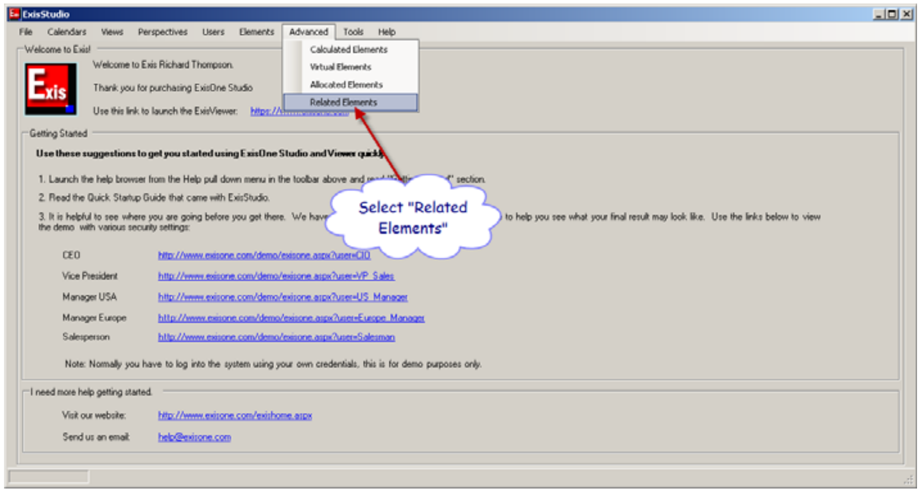
RELATED ELEMENTS

Often codes are used instead of descriptive names. For example product code instead of product name. But, it is much more convenient to have descriptions in reports and displays. When element for code is related to element for the descriptive name, ExisViewer, as default will display descriptive names. But, when it is useful, and if elements are related, ExisViewer can display both the code and descriptive names.



Start ExisStudio. Select “Related Elements” from the “Advanced” menu.

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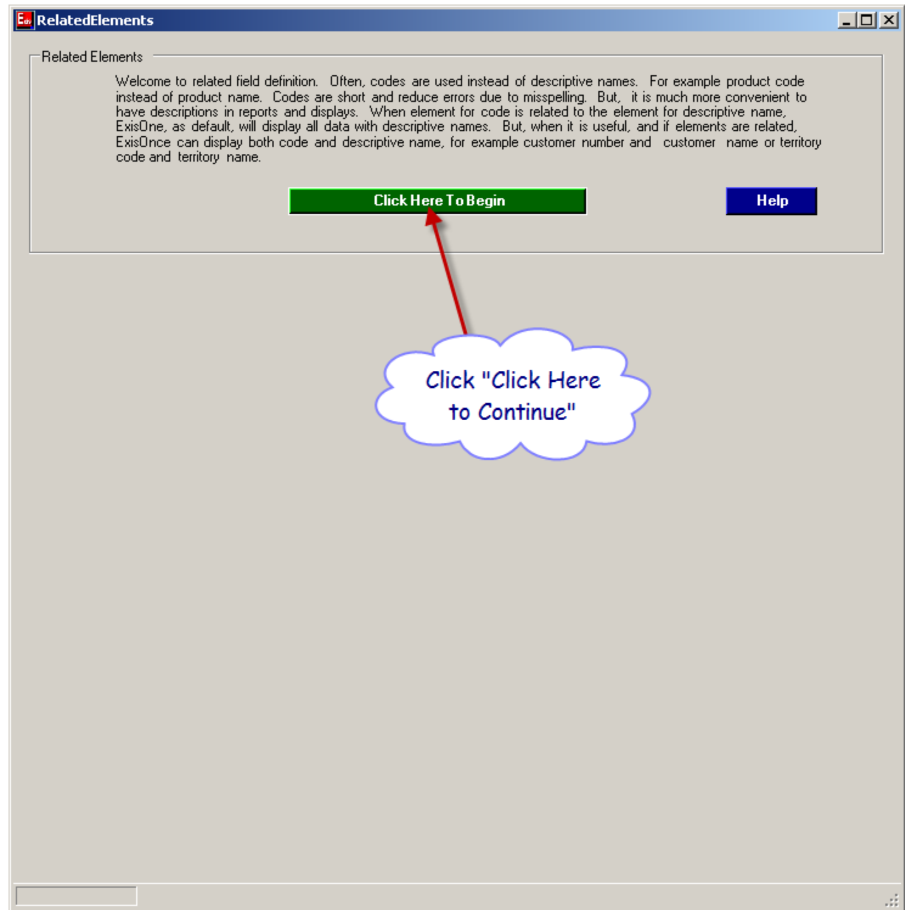

Click green button "Click Here to Continue" to get started.

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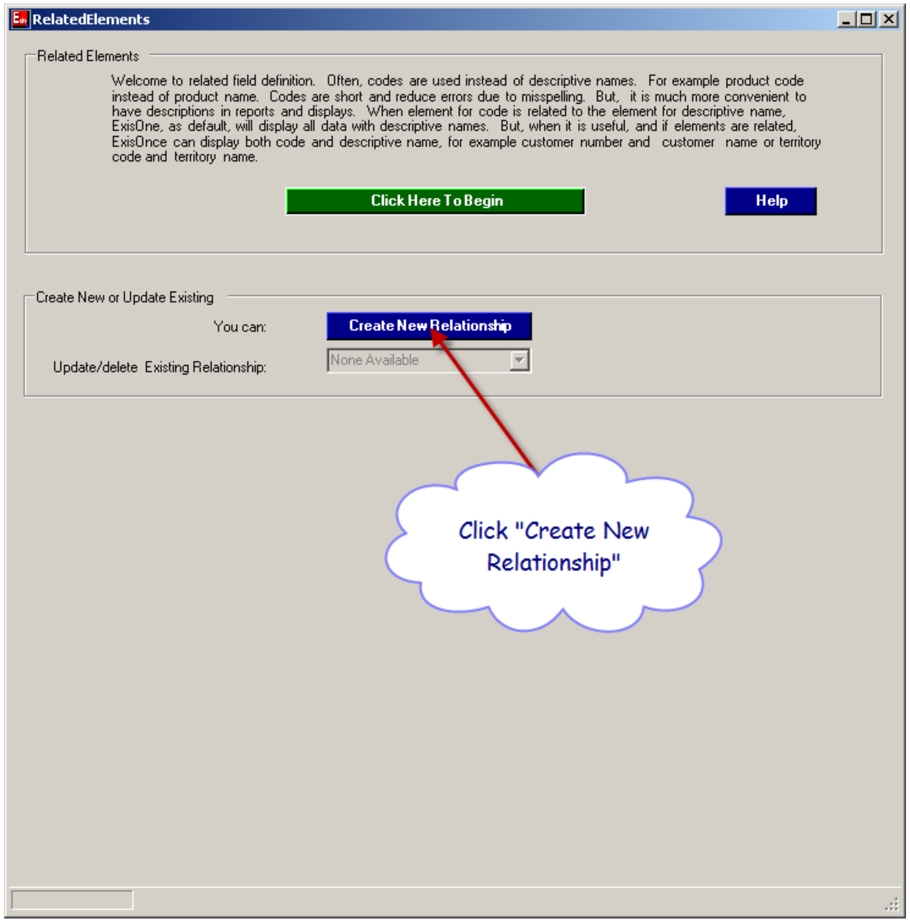
Click "Create New Relationship"



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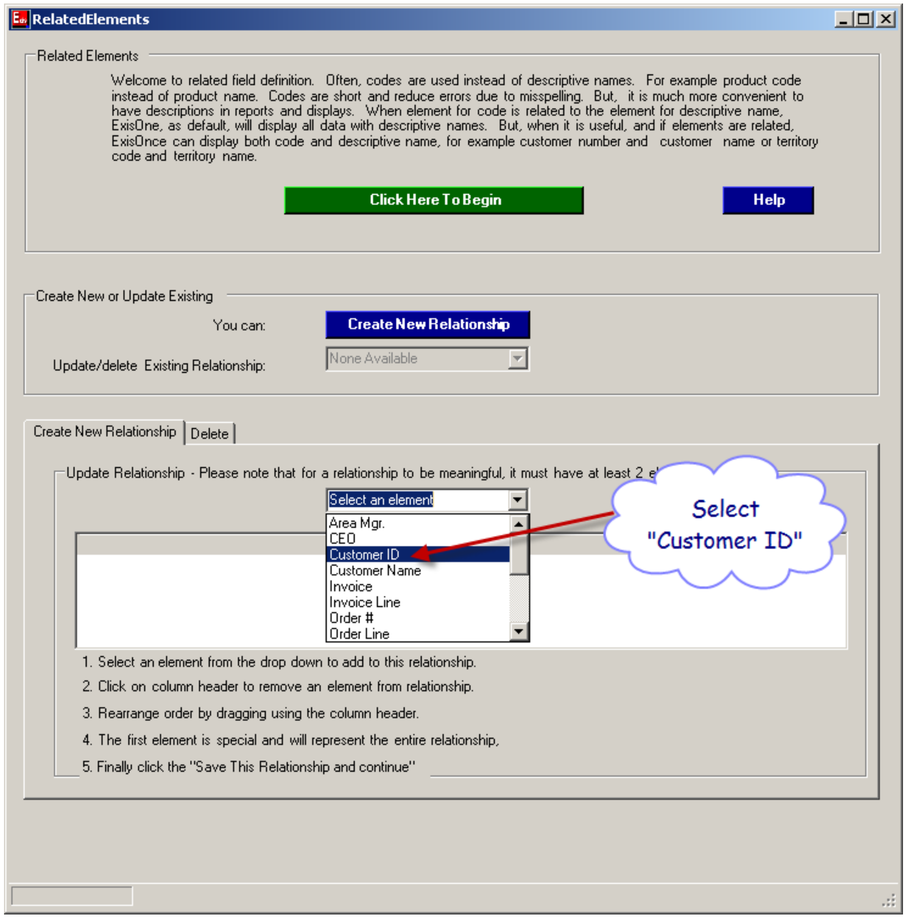
We will relate “Customer ID” to “Customer Name”.

From the drop down list of elements, select “Customer ID”.



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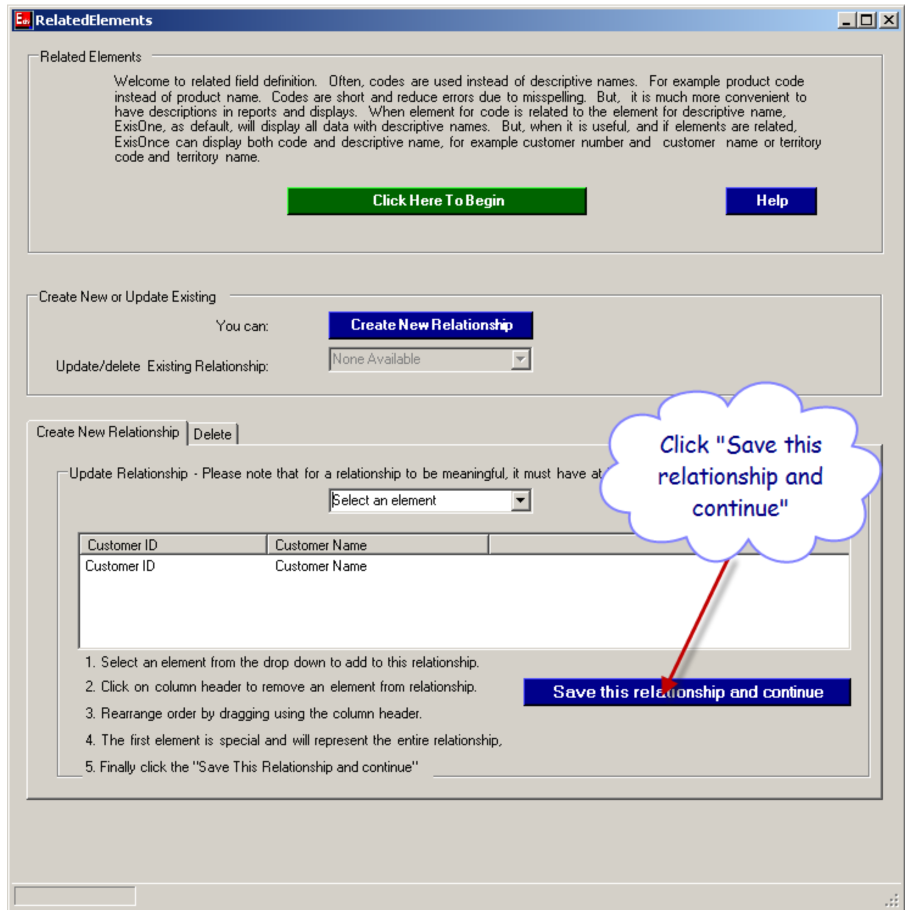
Add "Customer Name".

The order in which the elements are related is important. Always use the code as the first element. If for any reason, the code is not the first element, you can change the order by dragging the column title.

Click "Save this relationship and continue" button to save this relationship and continue.



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Now define the following relationships. Remember to click "Save this relationship and continue" after defining each relationship.

1st Element	2nd Element
Product Id	Product Name
Salesman ID	Salesman Name
Territory ID	Territory Mgr.

After the last relationship is defined, go to the next page.

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The relationships are not saved on the ExisServer until you click "You Have Unsaved Changes - Click Here to Update" button. Click the button now. Close "Related Elements" wizard

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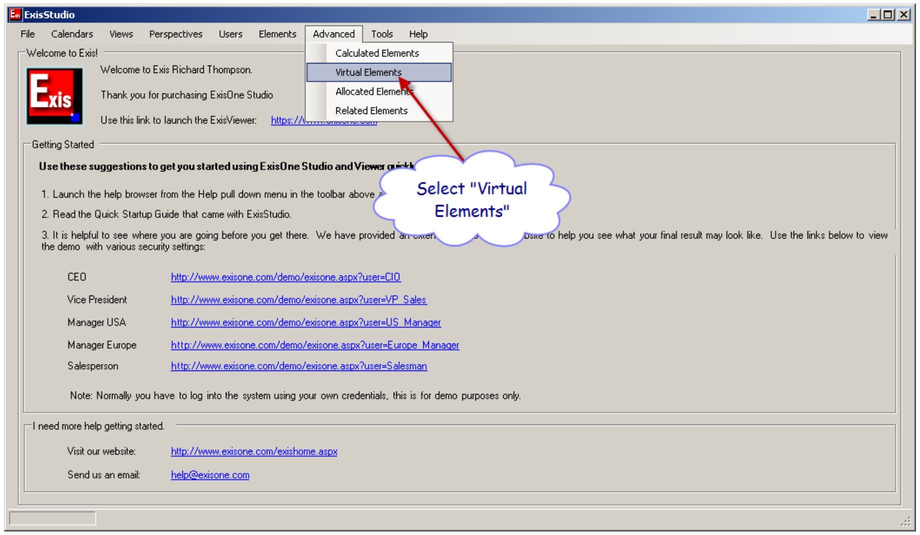
Define Virtual Elements

Virtual elements are computed from other elements including calculated elements. Unlike calculated elements that are stored in the data warehouse, virtual elements are not stored anywhere. Only the defining expressions are stored. The values of virtual elements are computed on the fly by ExisViewer.

Start ExisStudio. Select "Virtual Elements" from the "Advanced" menu.



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Click “Click Here to Begin”.

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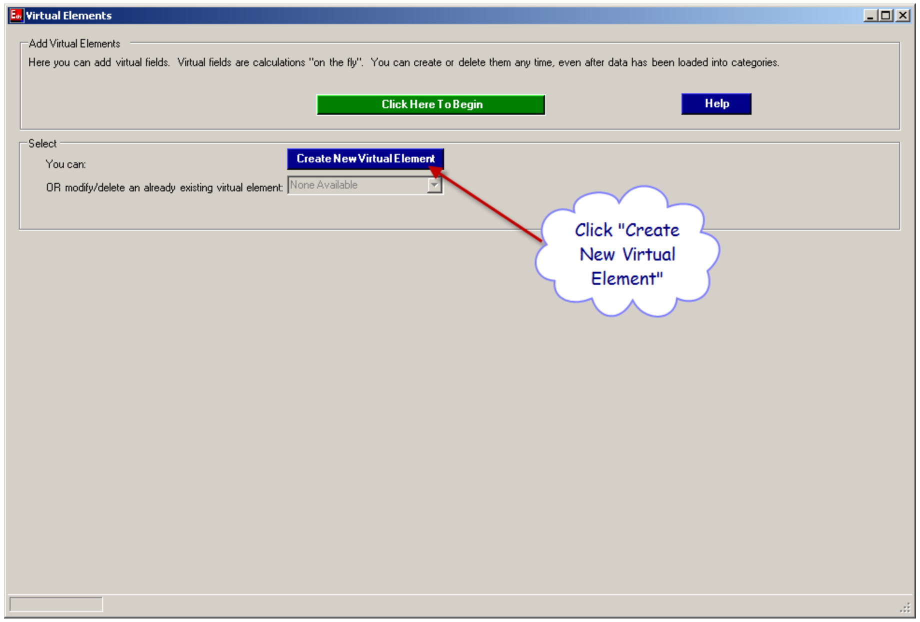
You are going to create a virtual element "Margin %". Expression is (Margin – (Unit Std. Cost * Qty Sold) * 100) / (Unit Std. Cost * Qty Sold)

Click "Create New Virtual Element".



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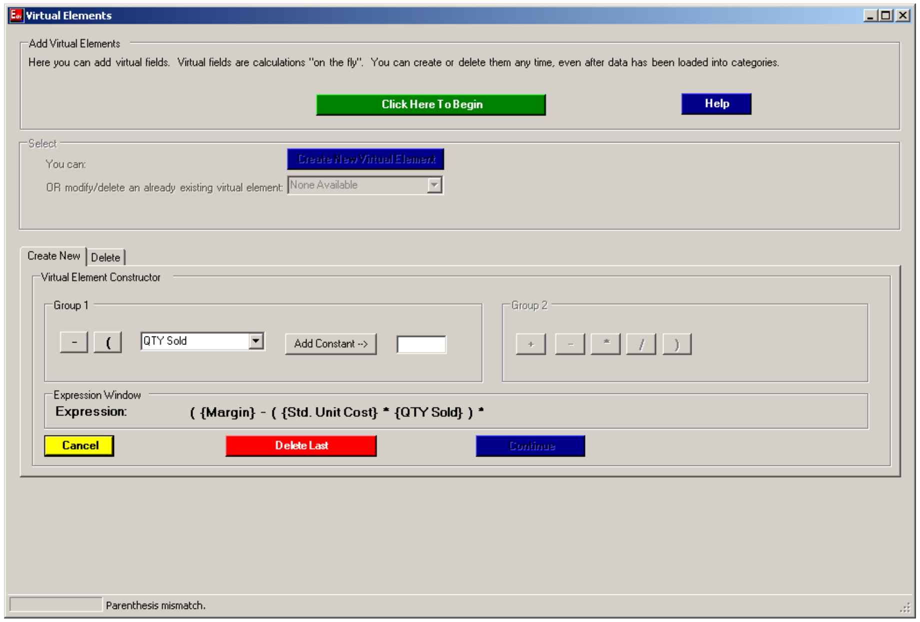
You should see "Virtual Elements" expression builder. It is identical to the "Calculated Elements" expression builder on page 66.

Construct the expression up to:
({Margin} – ({Std. Unit Cost} * {Qty Sold}) *



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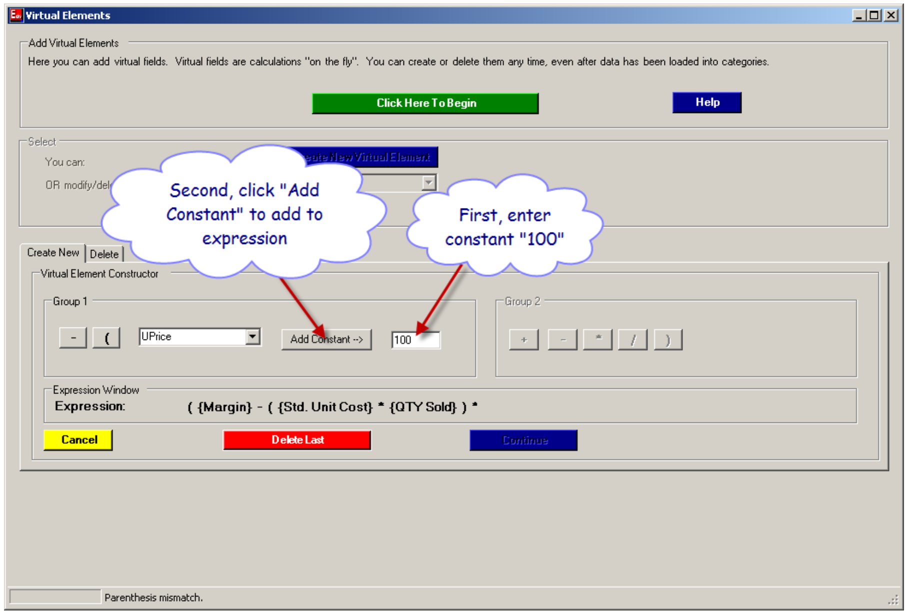
To add a constant to an expression, enter the value in the box and click “Add Constant” button.



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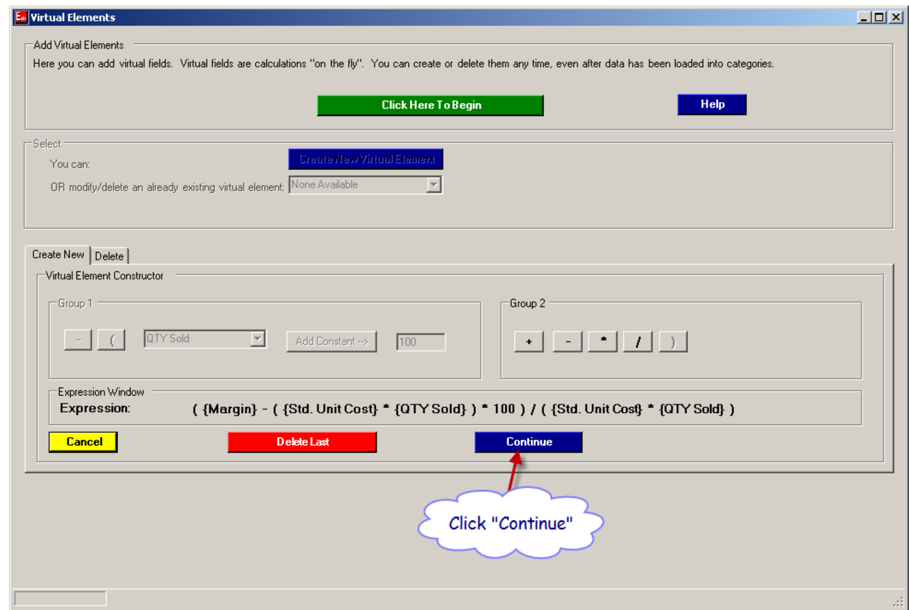
Complete the expression and then click "Continue" button.



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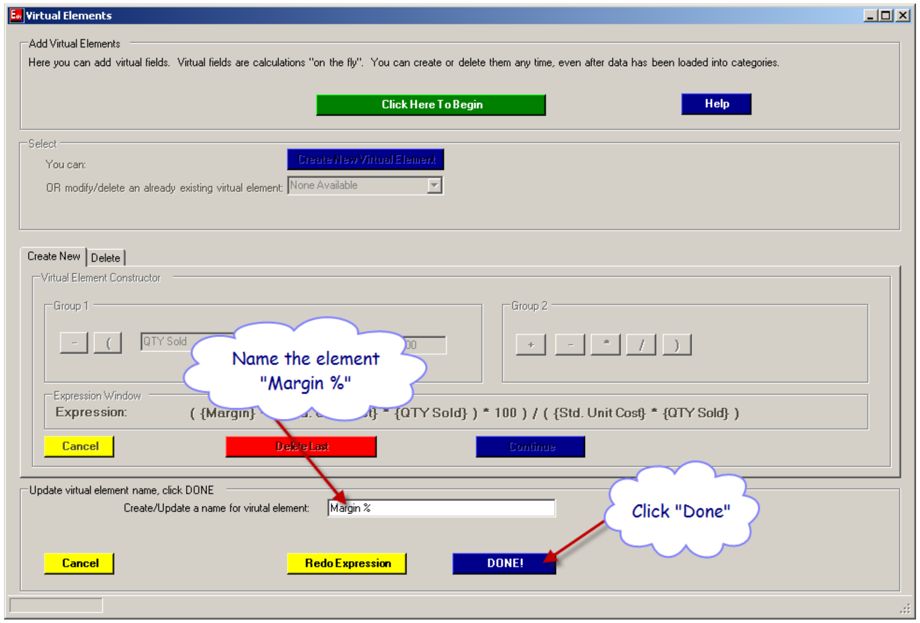
Name the element "Margin %" and click "Done" to finish defining the element. Close "Virtual Elements" wizard.



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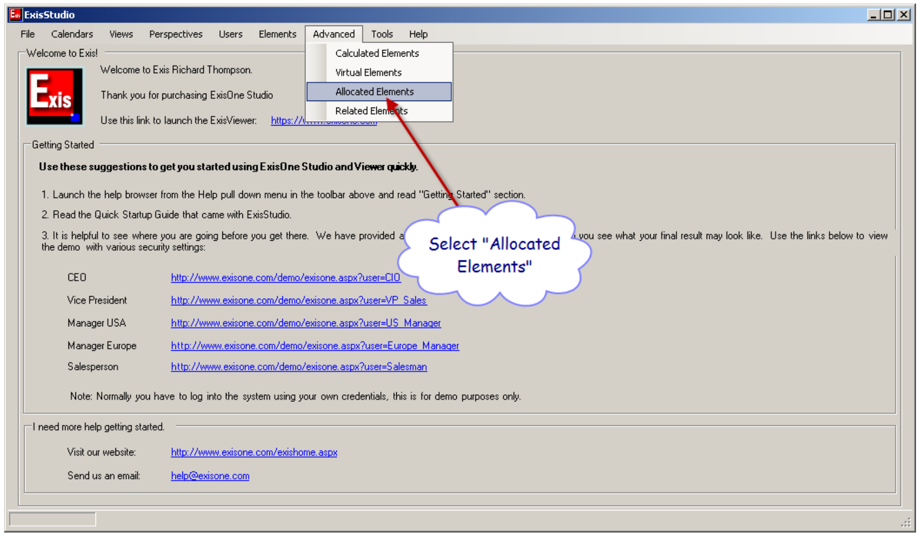
DEFINE ALLOCATED ELEMENTS

Some transactional records belong to a group. For example, invoice lines for one invoice are considered one group. Often, values of one or more elements are shared by all transactions of the group. For example, Shipping and handling cost is for an entire invoice rather than individual line items of the invoice. For such cases, ExisOne can allocate the value of such element to all records of the group.

Start ExisStudio.

Select "Allocated Elements" from the "Advanced" menu



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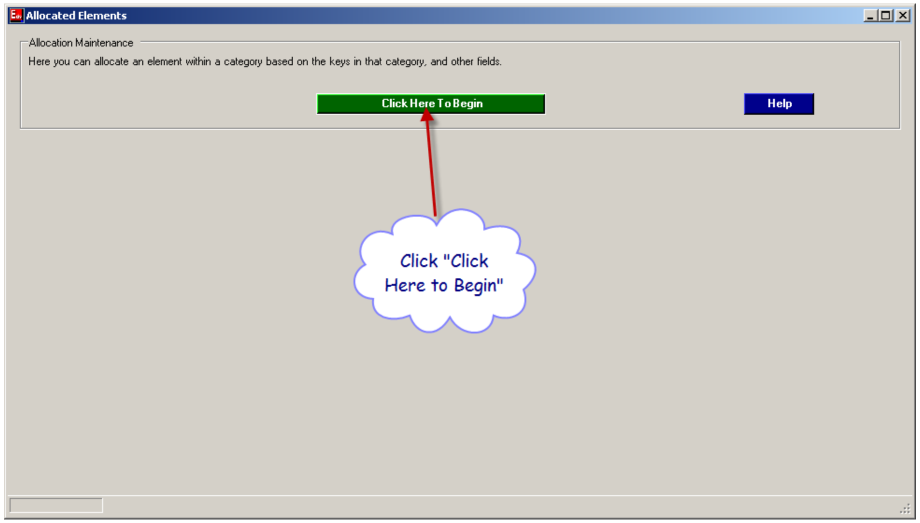
Click “Click Here to Continue”.



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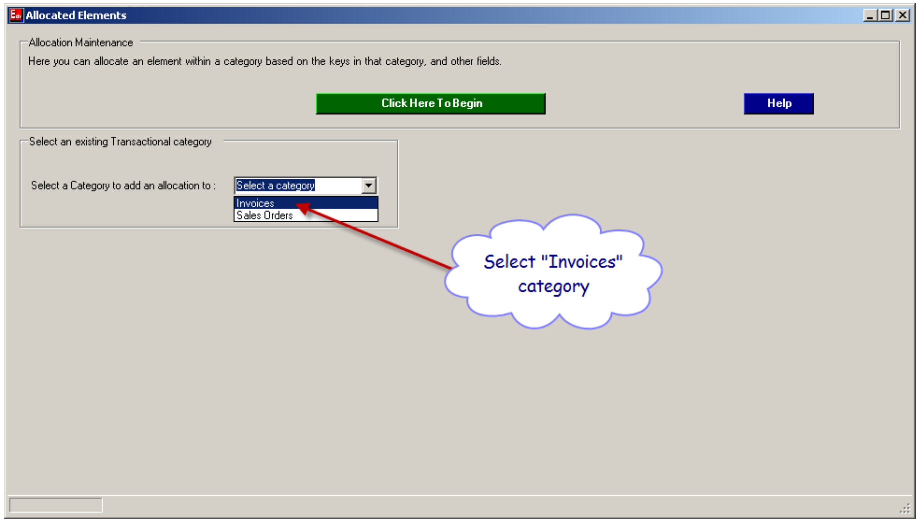
Select “Invoices” category.



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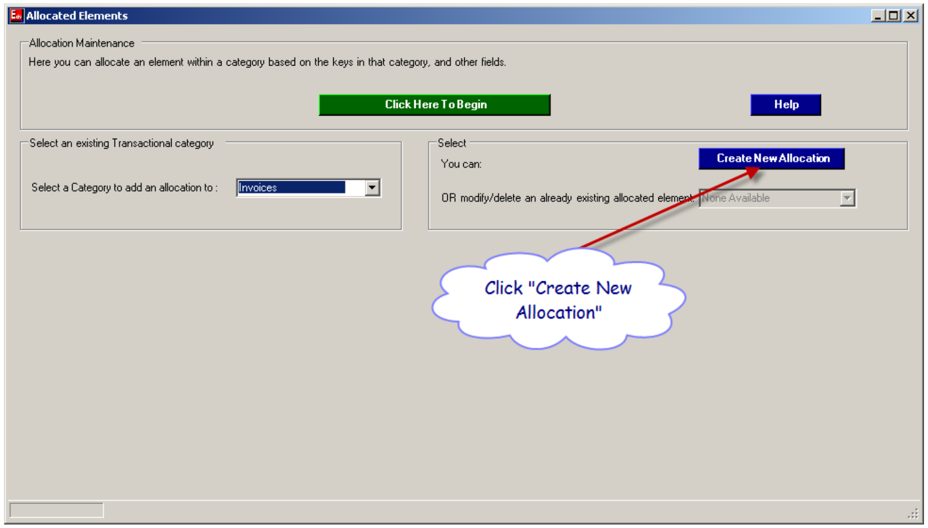
Click “Create New Allocation”.

You will note that in the sample file of “Invoices”; the total freight for an invoice is shown in records for each line item of the invoice. You will allocate this total invoice “Freight” to all line items of the invoice based on the weight of each line item.



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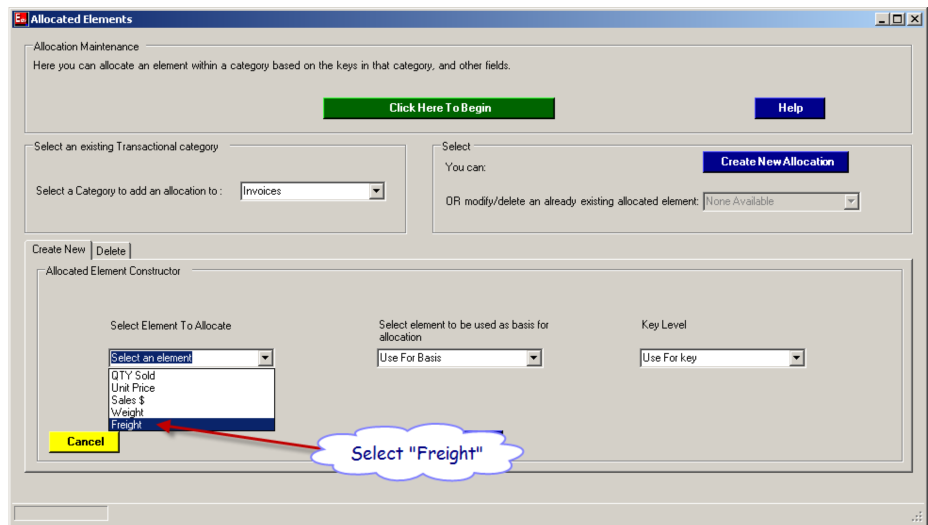
Select “Freight” as the element to be allocated.
Select “Weight” as the element to be used as basis..
Select “Invoice” as the key for the group of records.



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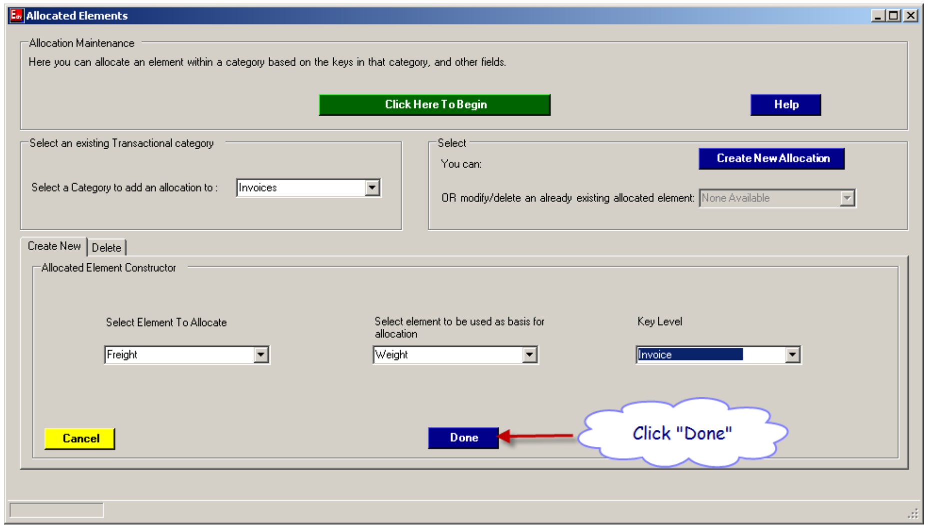
Freight allocation is now defined. Click "Done".

Allocation changes the value of an element. If in an allocated element is used in the expression for a calculated element then you should flag the calculation be performed post allocation (See Page 66). Else, it should be pre allocation.

Close "Allocated Elements" wizard.



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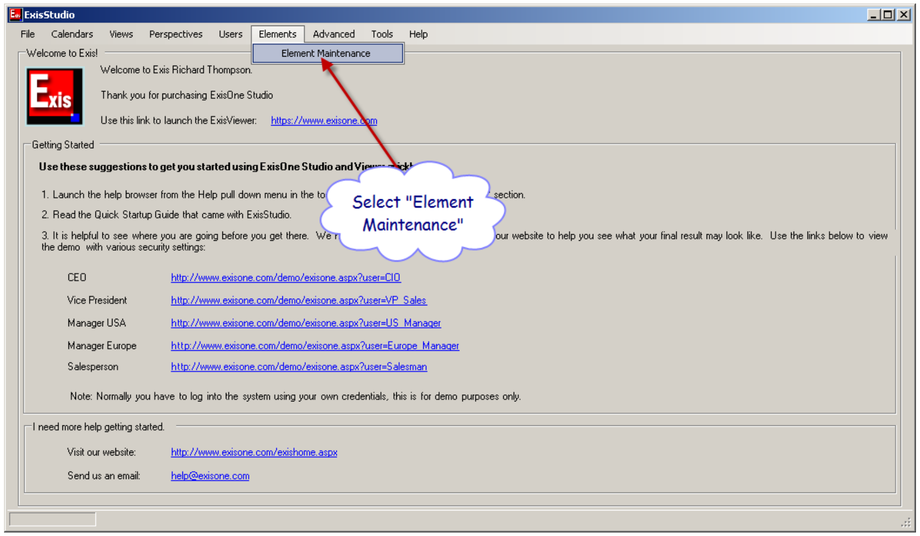
Element Maintenance

"Element maintenance" allow you to:

1. Rename an element
2. Specify default column title
3. Specify elements' security level

Start ExisStudio.

Select "Element Maintenance" from "Elements" menu.



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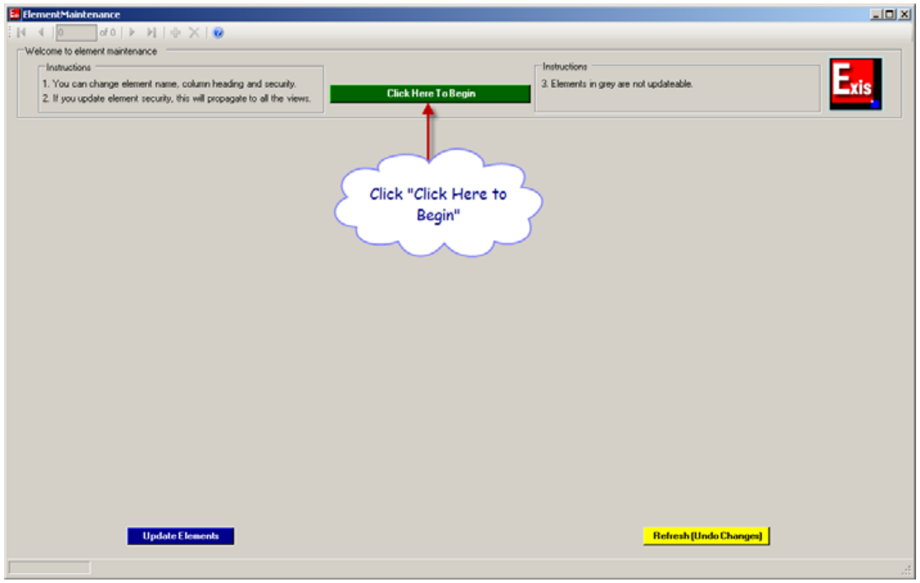
Click "Click Here to Begin".



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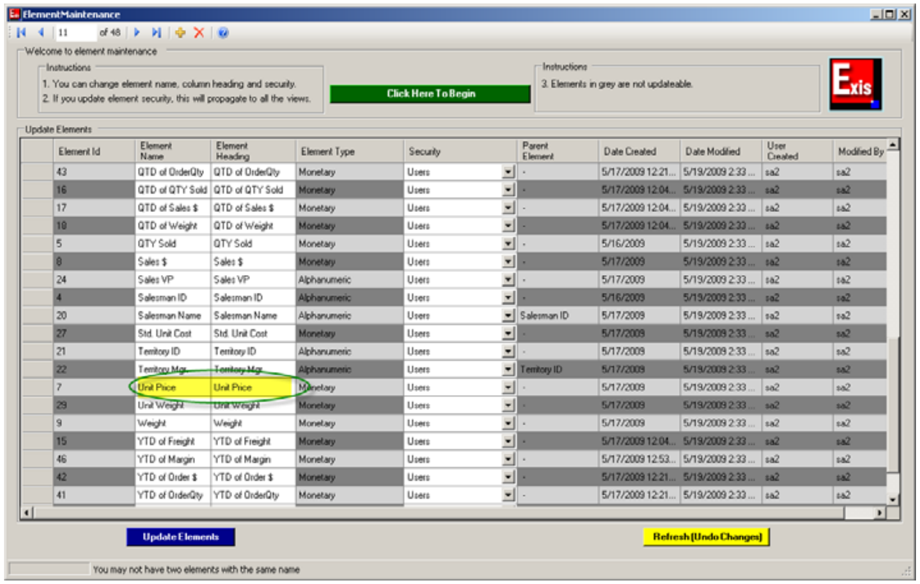
Scroll until element "Unit Price" is visible. Change "Unit Price" to "Invoice Price" in both columns.



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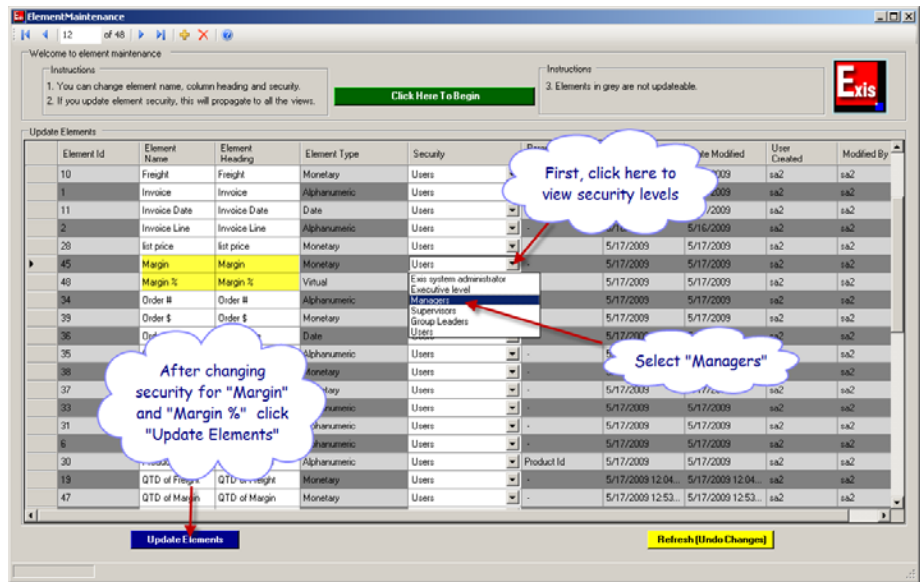
Now scroll until you can see elements "Margin" and "Margin %".

In "security" column for "Margin" click on down arrow to see security levels. Avoid assigning the top level to any element. Security will be discussed further when defining "Views" and "Users". For "Margin" and "Margin %" select "Managers".

The changes will not take effect until you "Click" blue "Update Elements" button.

Close "Element Maintenance".



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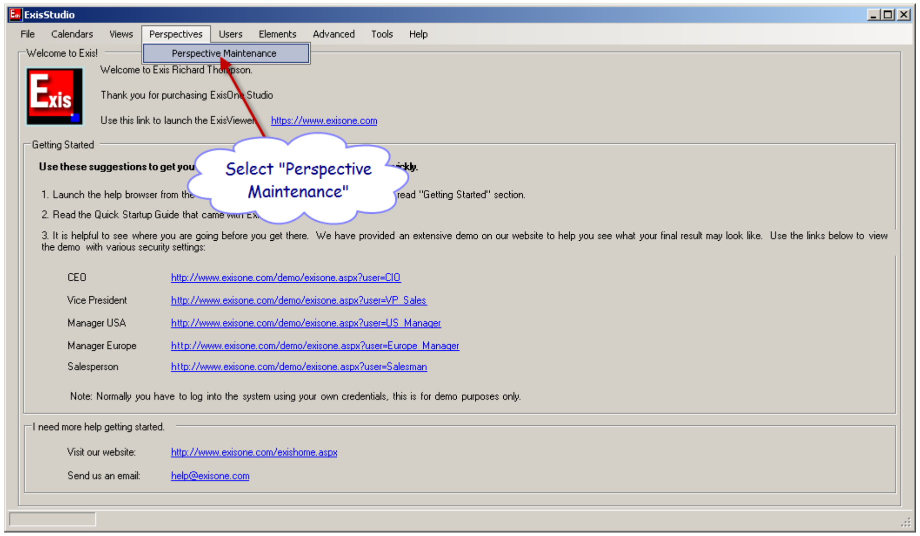
Define Perspectives

Decision requires concise and actionable information. ExisOne uses Perspectives to accomplish this. Massive amounts of raw data collected by computers are cross linked and summarized as directed by perspectives. Different people in an organization need information from different perspectives. Sales organization may be more focused on sales by regions and territories while product management needs to know sales of products to different industries



Start ExisStudio.

Select “Perspective Maintenance” from “Perspective” menu.

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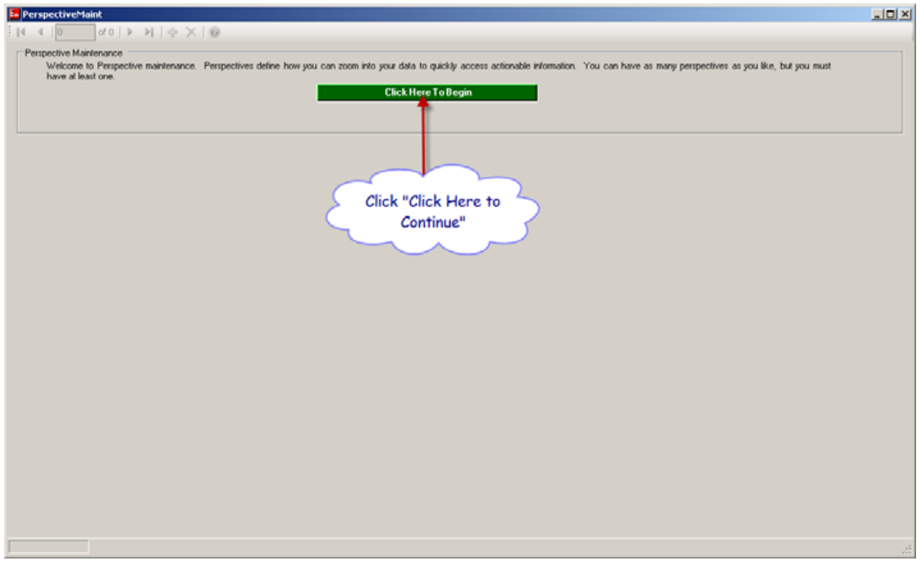
Click green “Click Here to Continue” button.



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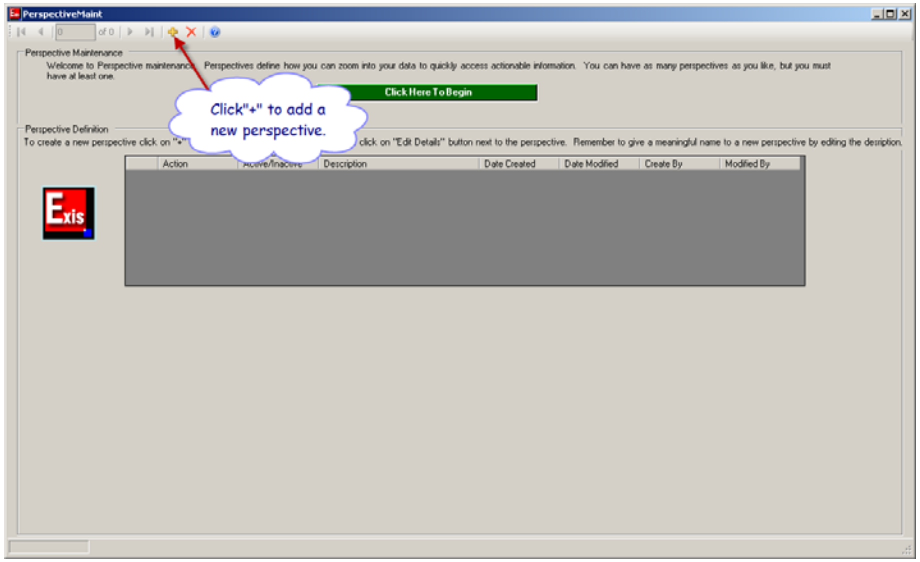
Perspective controls how to zoom-in for more details. First you will create a corporate perspective for CEO, VP-Sales,
Click “+” in the toolbar to add a new perspective.



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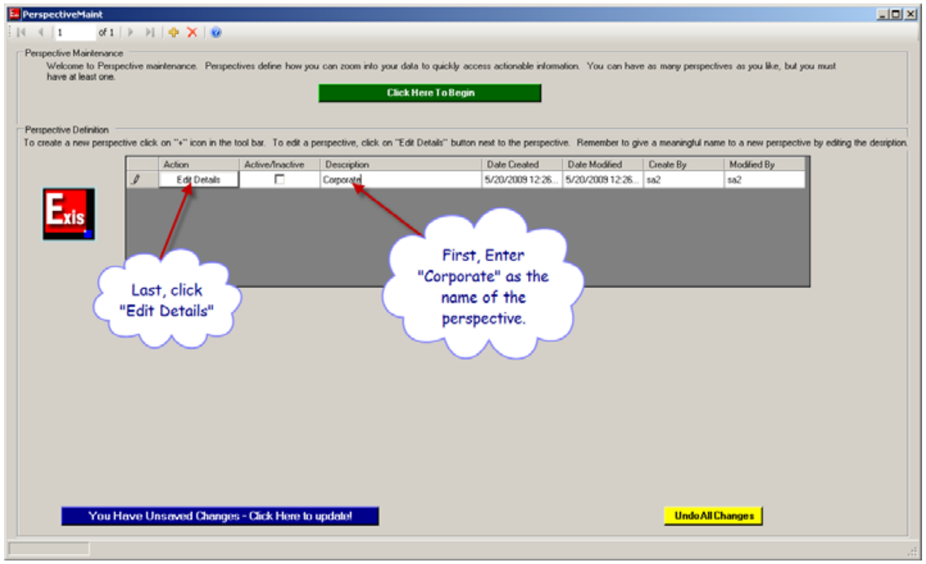
Click the temporary name of the perspective and enter "Corporate" and then click "Edit Details".



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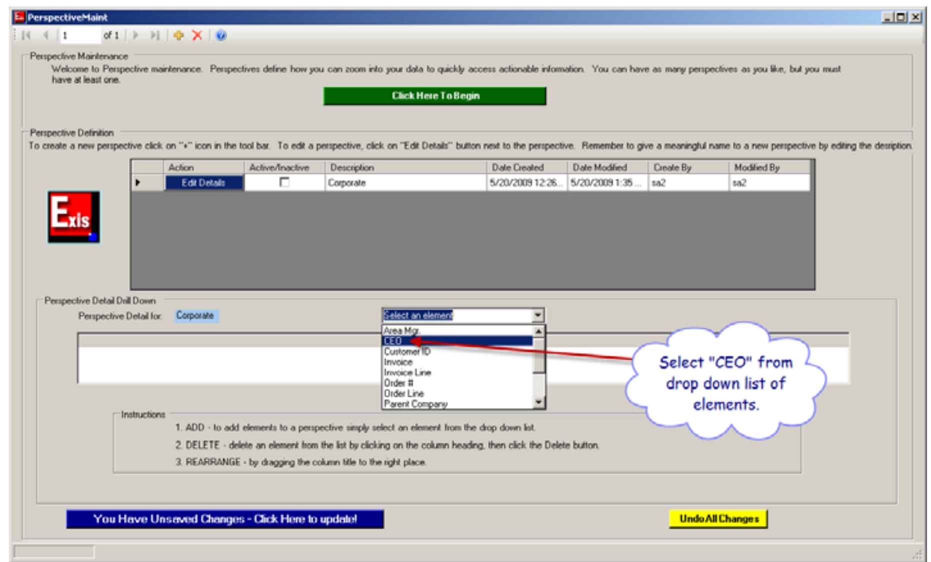
A perspective is an orderly list of key elements.

For "Corporate" use:

1. CEO
2. Sales VP
3. Area Mgr
4. Territory ID
5. Salesman ID
6. Customer ID

Select "CEO" from drop down list of elements. Note that "Territory Mgr", "Salesman Name", and "Customer Name" are not in the drop down list. This is because only the parent elements are necessary.



Now add the following elements to the perspective:

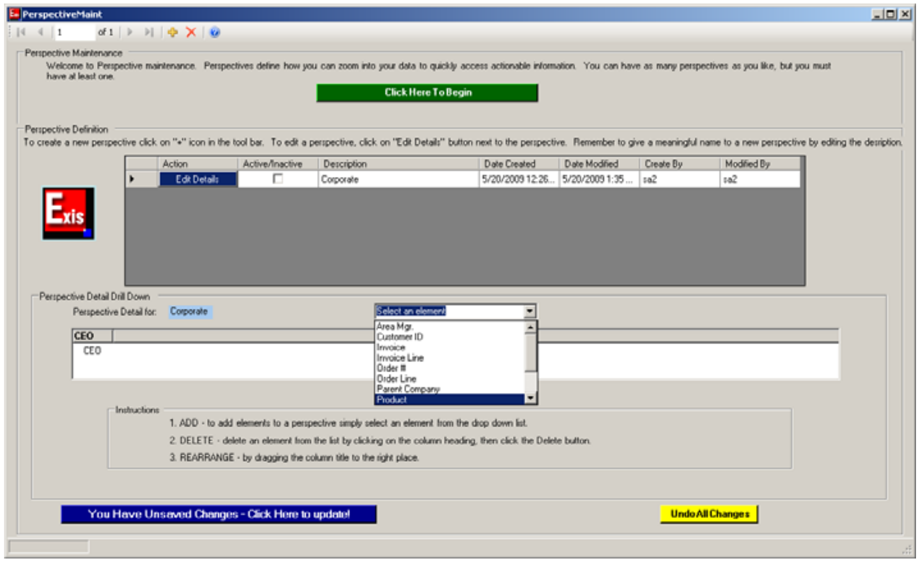
Sales VP

Area Mgr

Territory ID

Salesman ID

Customer ID



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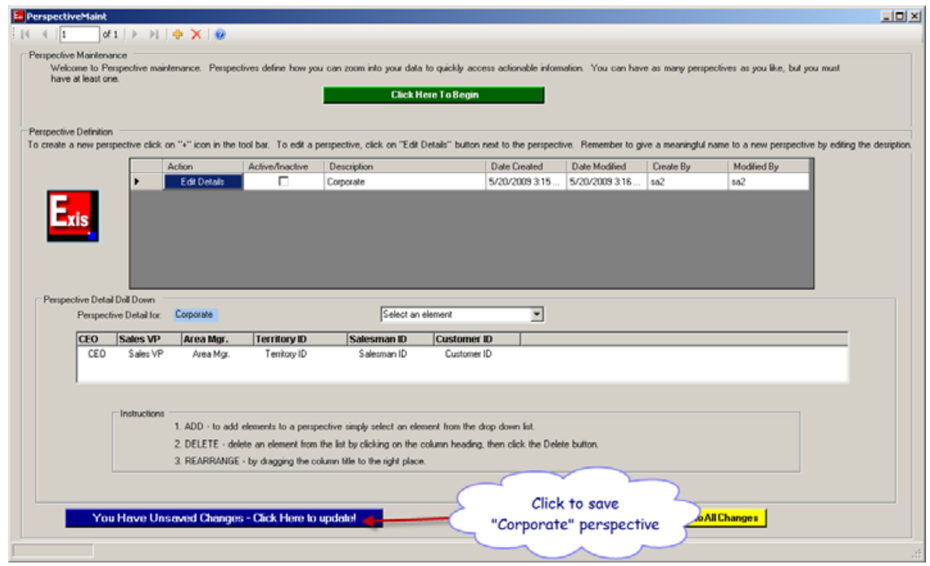
"Corporate" perspective is defined. Click blue "You Have Unsaved Changed – Click to Save" button.



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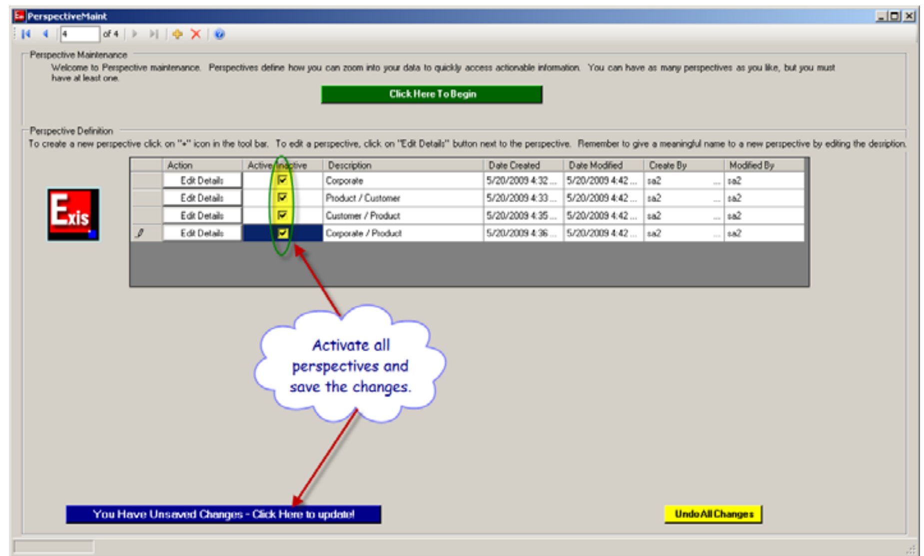
Now define the following three perspectives with elements shown in the table.

	Product / Customer	Customer / Product	Corporate / Product
1	Product	Parent Company	CEO
2	Product ID	Customer ID	Sales VP
3	Customer ID	Product ID	Area Mgr
4			Product
5			Product ID



ExisOne will not create data warehouse for a perspective until the perspective is activated. Activate all four perspectives.

Close Perspectives wizard.

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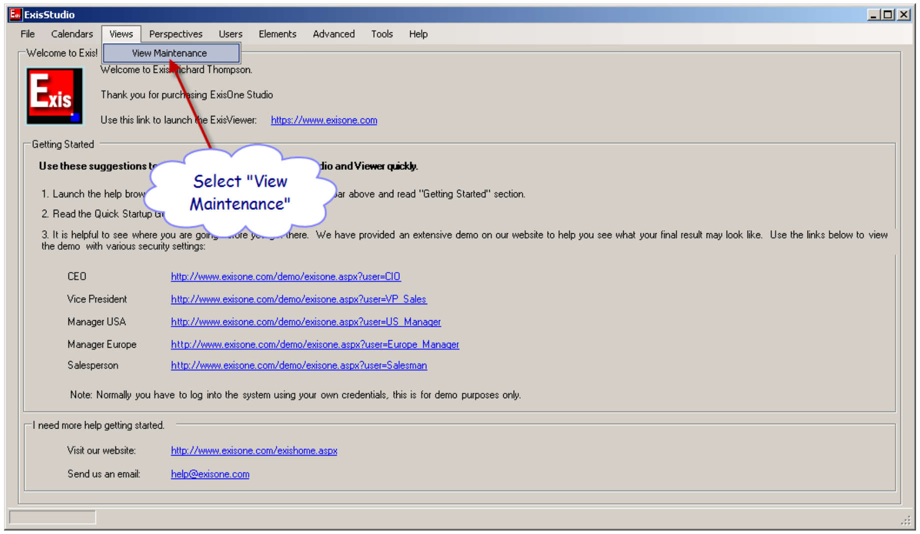
Define Views

Views are collections of numerical elements organized together in a way that makes practical and business sense. You can create as many views as you like.

Start ExisStudio.

Select "View Maintenance" from the "Views" menu.



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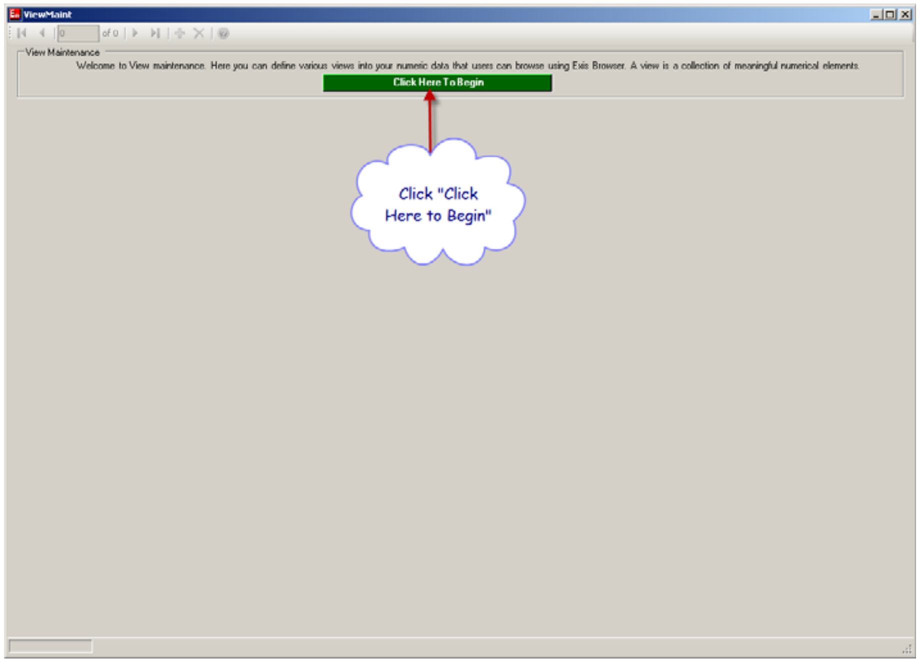
Click “Click Here to Begin” button.



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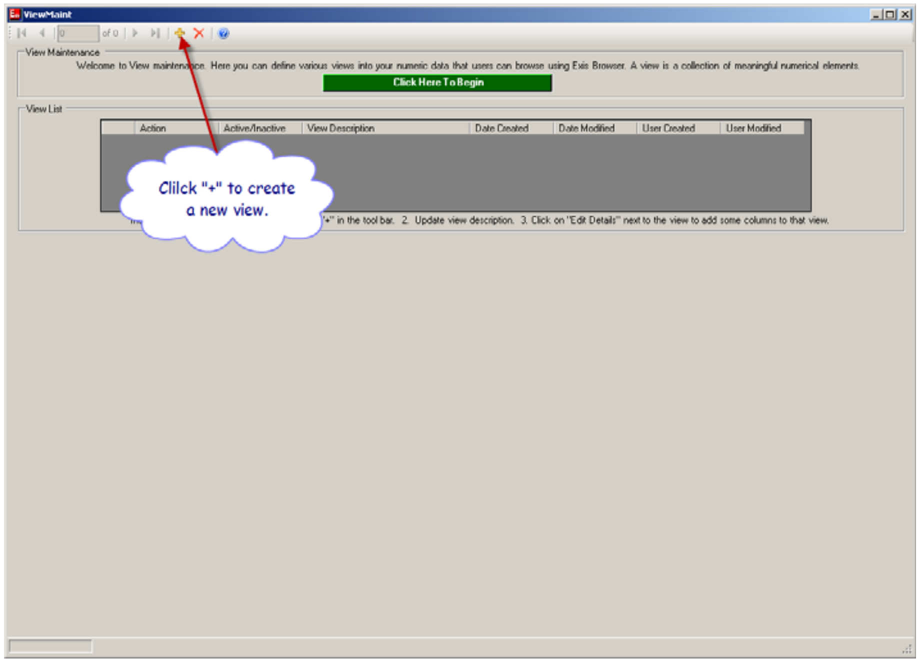
Click “+” in the toolbar to add a view.



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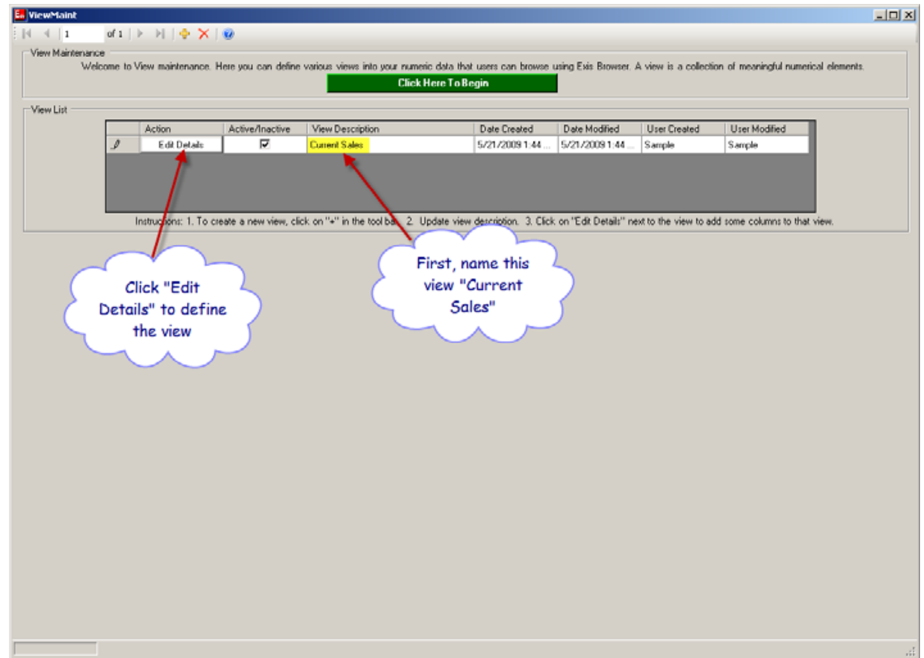
Change name (Description) of the view to "Current Sales".

Click "Edit Details" to define "Current Sales" view.



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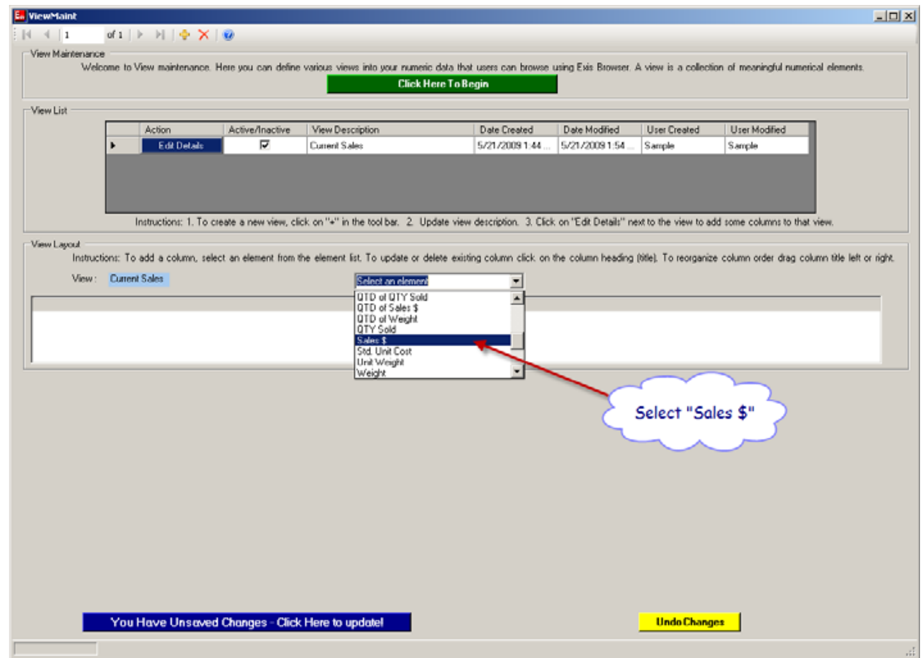
Select “Sales $” from the drop down element menu.



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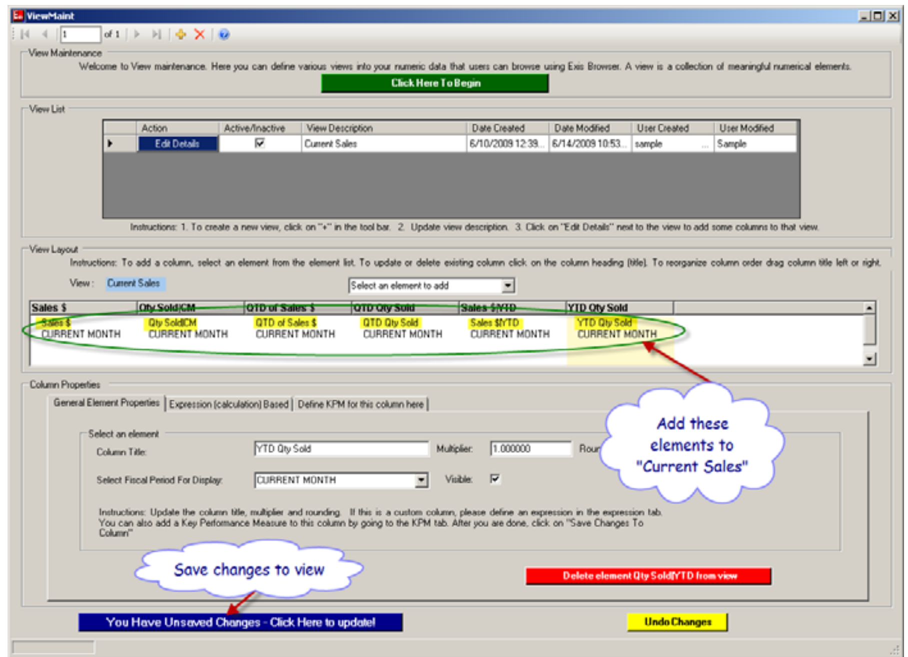
Add the following elements to the view:

1. Qty Sold
2. QTD of Sales $
3. QTD of QTY Sold
4. YTD o Sales $
5. YTD of QTY Sold

The bottom panel allows changes to the properties of columns. For this view, use defaults.

Save changes to the view.



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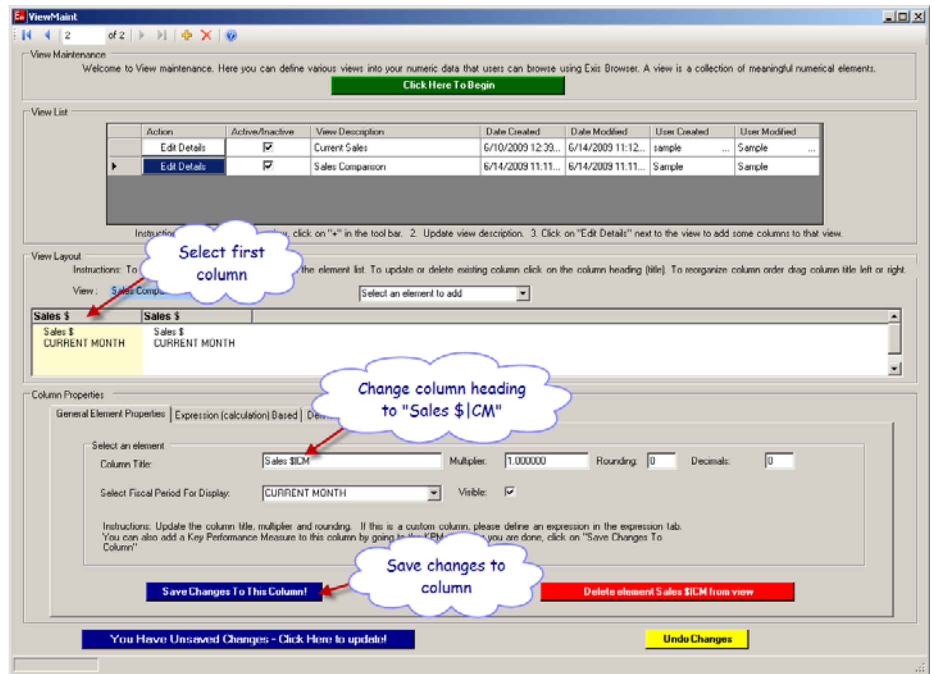
Add second view "Sales Comparison".

Add "Sales $" twice.

Select properties of the first column by clicking on the column title of the first column. The column will highlight in yellow and a properties dialog will open below.

Change column title to "Sales $|CM". The vertical bar ("|") means new line. So, the first line will be "Sales $" and the second line will be "CM".

Save changes to the column.



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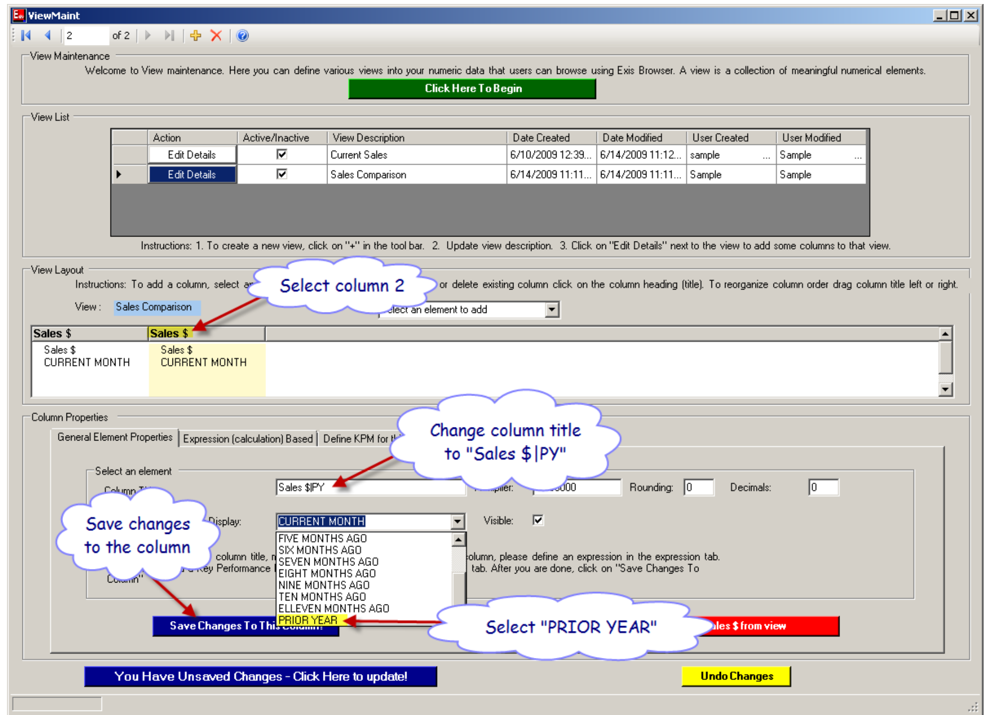
As default current period's data is displayed. But, you can offset the period to display data for a prior period. Just select the period from the drop down list.

Select column 2. Note "CURRRENT MONTH" below element's current column title.

Change column title to "Sales $|PY".

Select "PRIOR YEAR" from the drop down list.

Save changes.



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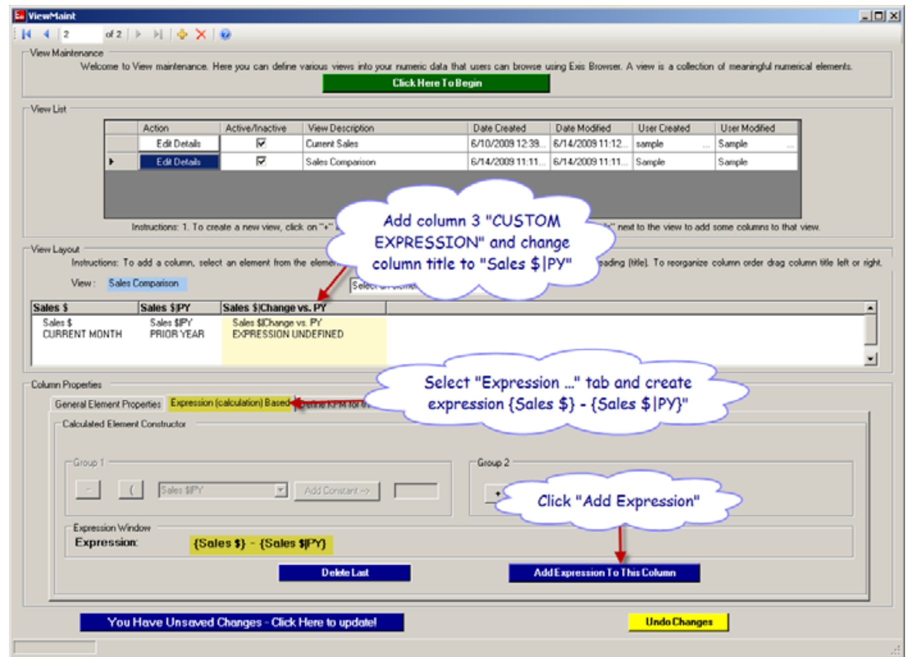
Note that after saving the column 2 is now "PRIOR YEAR".

Add column 3 "CUSTOM EXPRESSION" and change column title to "Sales $|Change vs. PY".

Select tab "Expression (calculation)".

Create expression "{Sales $|CM} – {Sales $|PY}.

Click "Save Expression for the column".



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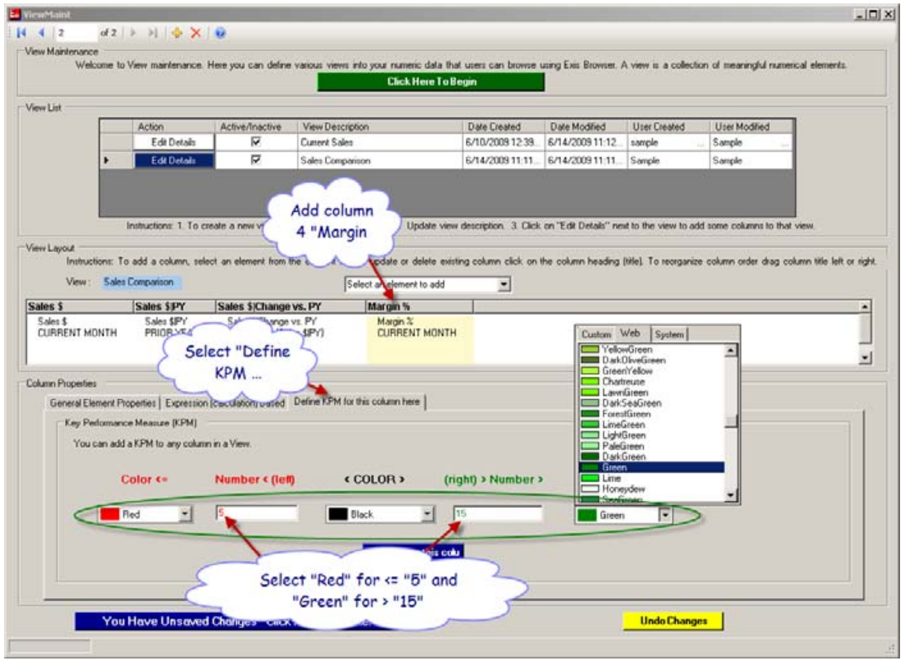
Key Performance Measure or KPM is data that are critical to decision makers. It is useful if the KPM data is presented to quickly draw the attention of the person who is looking at the data. In this sample data, Margin % is considered a KPM. The following is setup to display Margin of 2% or less in red, over 5% in green and in between in black.



Add column 4 “Margin %”.

Select tab: Define KPM for this column here”.

Pick “Red” for “Color <=”, “5” for “Number N (left)”, “Black” for “< COLOR >”, “15” for “(right) > Number >” and “Green” for “>= Color”

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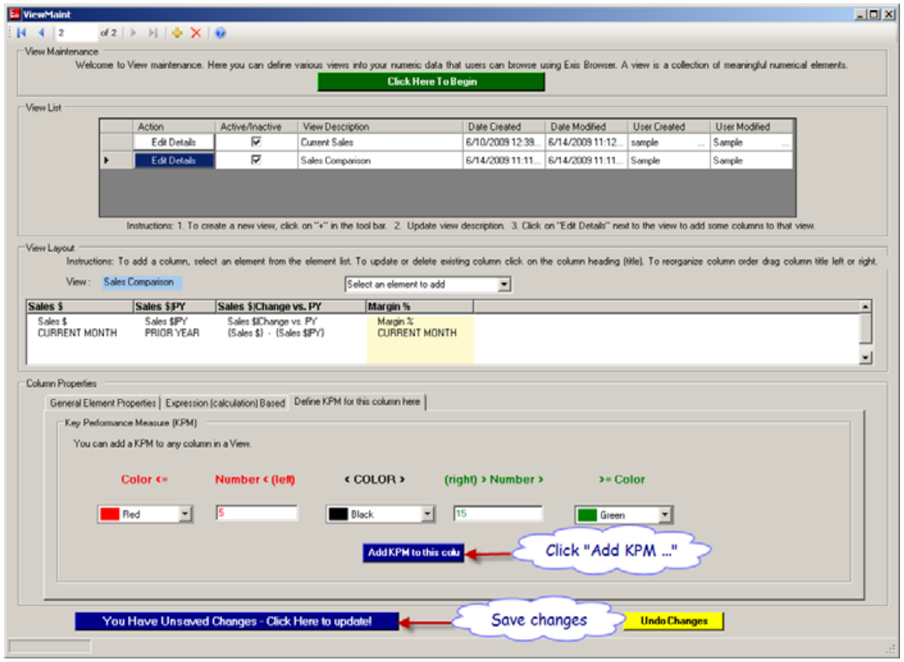
Click "Add KPM to this column".

Click "You Have Unsaved Changes (click here to update)".



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View Element Properties

Property	**Explanation**
Multiplier	Multiplies data by the value. To display in thousands, enter 0.001, To display data in different currency, enter conversion factor. After multiplying, the result will be rounded to the number of decimals specified. E.G:

Value	Multiplier	Decimal	Display
123,456	.001	0	123
1,234,567	.001	0	1235
1,234,567	.001	2	1,234.56
123,456	0.78	0	96,296
123,456	.0.78	2	96,295.68
123,456	100	0	12,345,600

.

Rounding	Rounds to the number of digits left or right of the decimal. E.G.

Value	Rounding	Decimal	Display
123.456	2	3	123.460
1,234,567	2	0	1,234,567
1,234,567	-3	0	1,235,000

Decimals	Number of digits after decimal point to be displayed.
Visible	To display or hide the column

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Add view "Daily Status" using the following:

Element	Column Title	Expression	Visible	Multiplier
Sales $	Sales $K		Yes	0.001
Order $	Order $K		Yes	0.001
Custom Expression	Sales|Total	{Sales $K}+{Order $K}	Yes	1
Qty Sold	Qty Sold		Yes	1
Order Qty	Order Qty		Yes	1
Custom Expression	Quantity|Total	{Qty Sold}+{Order Qty}	Yes	1
Std. Unit Cost	Std. Unit Sold		No	1
Custom Expression	Contribution|to Profit	({Sales $K} + {Order $K}) - (({Qty Sold} + {Order Qty}) * {Std. Unit Cost})	Yes	1

Close "View wizard".

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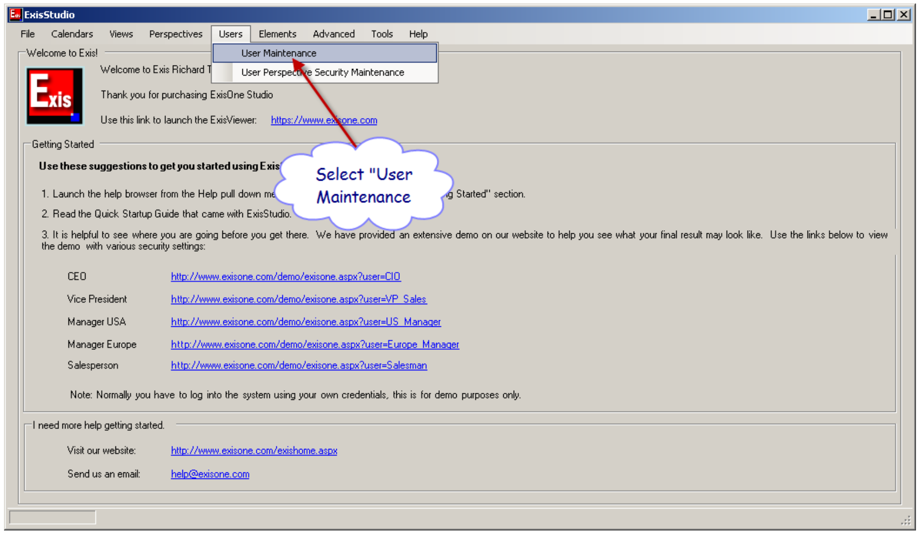
CREATE USERS

Only the users authorized through this wizard will have access to ExisViewer.

Select “User Maintenance” from “Users” menu.



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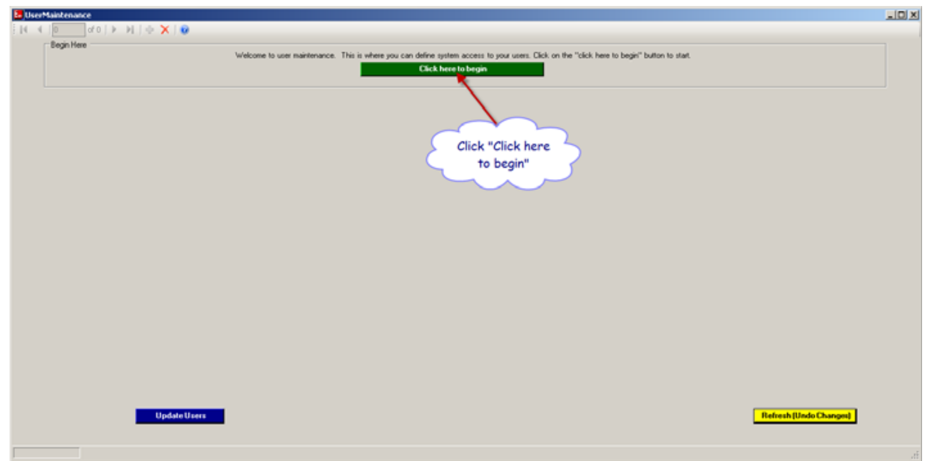
Click “Click here to begin” to start authorizing users.



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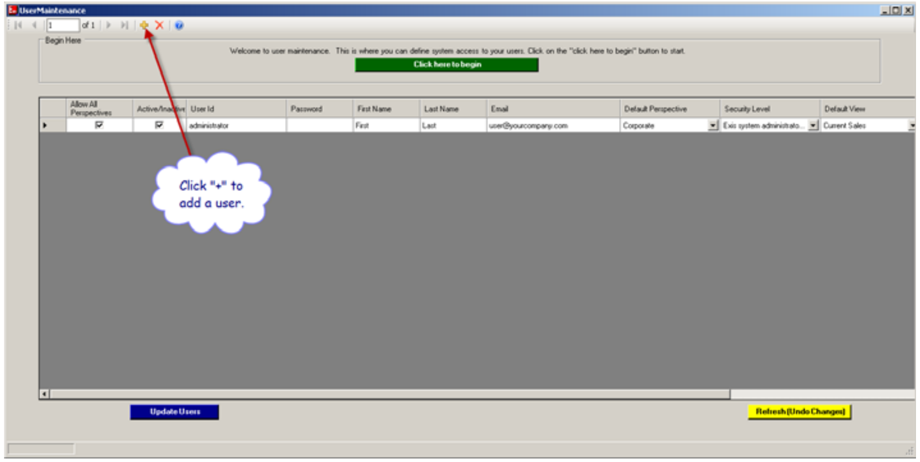
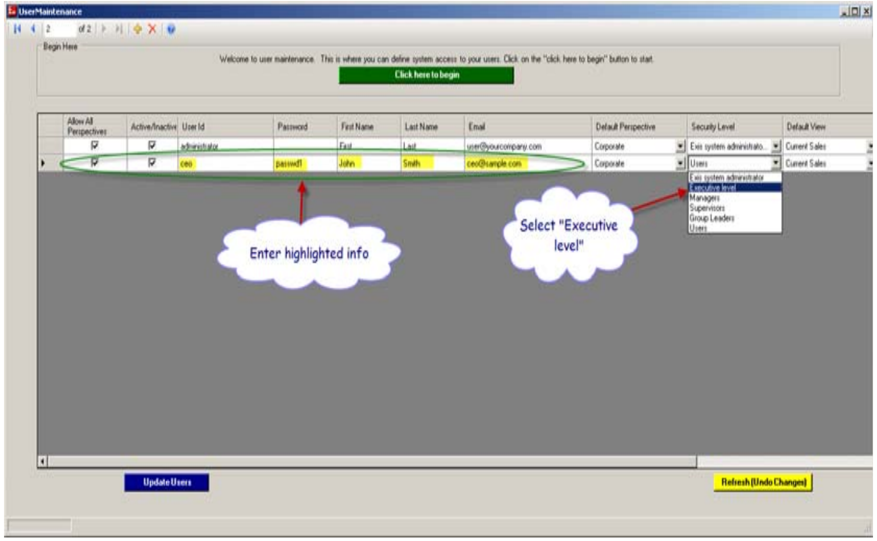
Click "+" in the toolbar to add a user.



Enter the following data:

Check "Allow All Perspectives"	(unrestricted access to all perspectives)
Check "Active / Inactive"	(user is active)
User Id:	ceo
Password:	passwd1
First Name:	Christopher
Last Name:	Dubover
Email:	cdubover@sample.com
Default Perspective:	Corporate (ExisViewer will start with "Corporate" perspective.)
Security Level:	Executive level
Default View	"Current Sales" (ExisViewer will start with "Current Sales" view.)



Add users "manager" and "salesman" with the following info::

User	manager	salesman
Allow All Perspectives	Uncheck. Restricted access to specific data.	Uncheck. Restricted access to specific data.
Active / Inactive	Check. User is active	Check. User is active
User Id:	manager	salesman
Password:	passwd2	passwd3
First Name:	Igor	Howard
Last Name:	Wassef	Stillman
Email:	iwassef@sample.com	hstillman@sample.com
Default Perspective:	Corporate (ExisViewer will start with "Corporate" perspective.)	Customer / Product (ExisViewer will start with "Customer / Product" perspective.)
Security Level:	Managers	User
Default View	"Current Sales" (ExisViewer will start with "Current Sales" view.)	"Sales Comparison" (ExisViewer will start with "Sales Comparison" view.)

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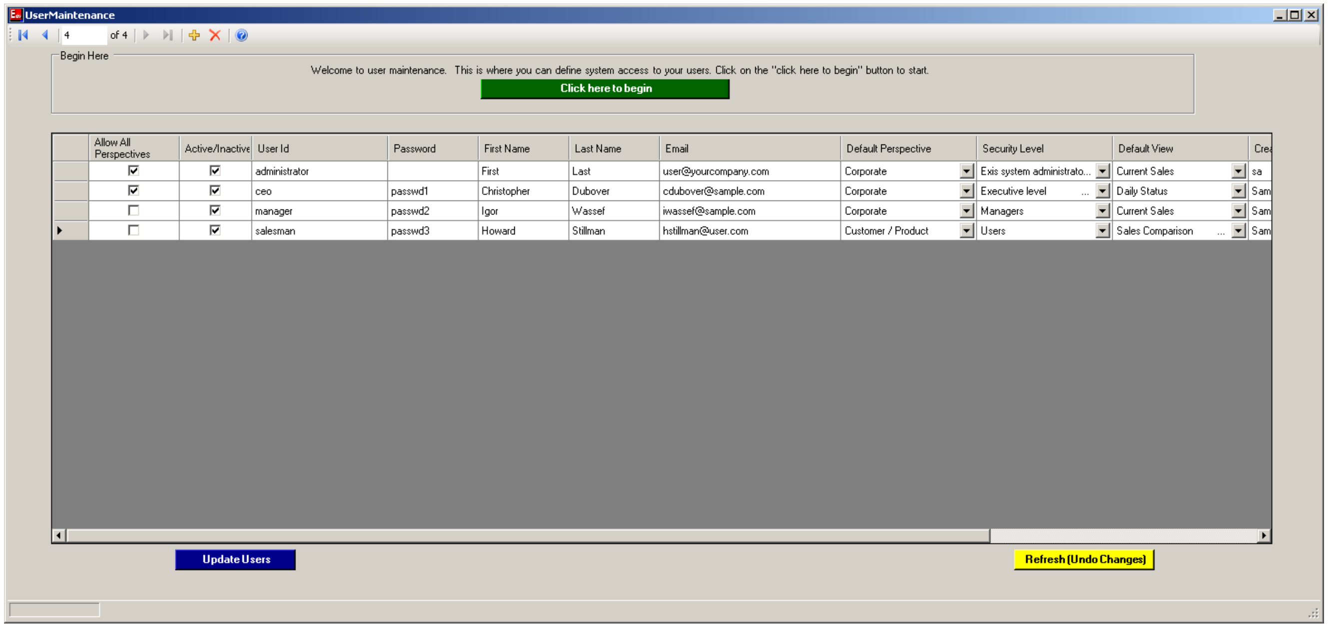
Click “Update Users” to save the changes.

Close “Users” wizard..



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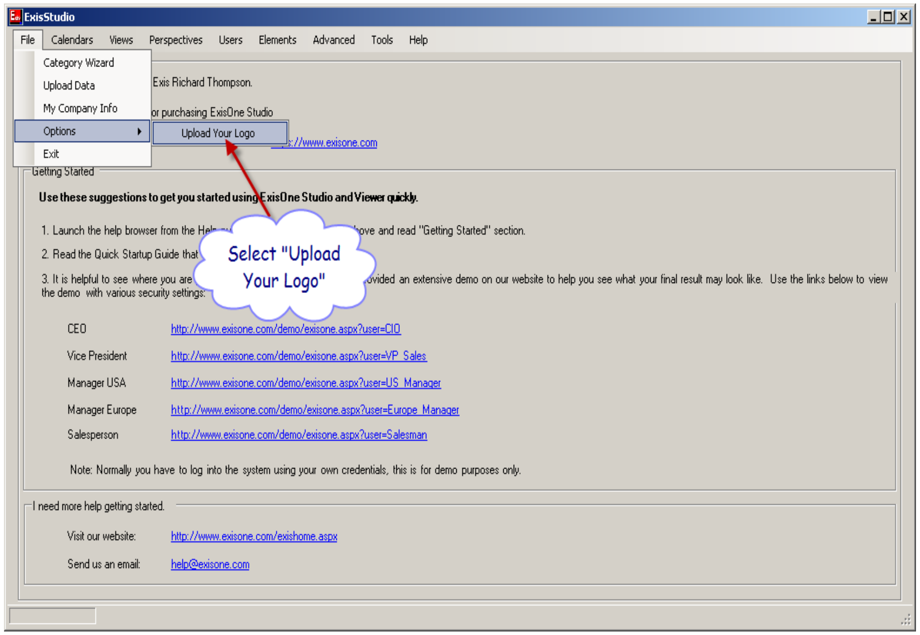
UPLOAD LOGO

If you upload your company's logo, ExisViewer will display the logo on all display screens. JPEG is the only format currently supported.

The size of the image should be kept small so as not to disrupt the Viewer. The image should not be higher or wider then 80px (ideal would be 80X80).

If you do not wish to upload a logo now, skip to page 129.

Select "Upload Your Logo" from "Options" in "File" menu.



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Click “Click Here to Begin” to start the wizard.

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Click "Click Here to Select File" to select your logo file.

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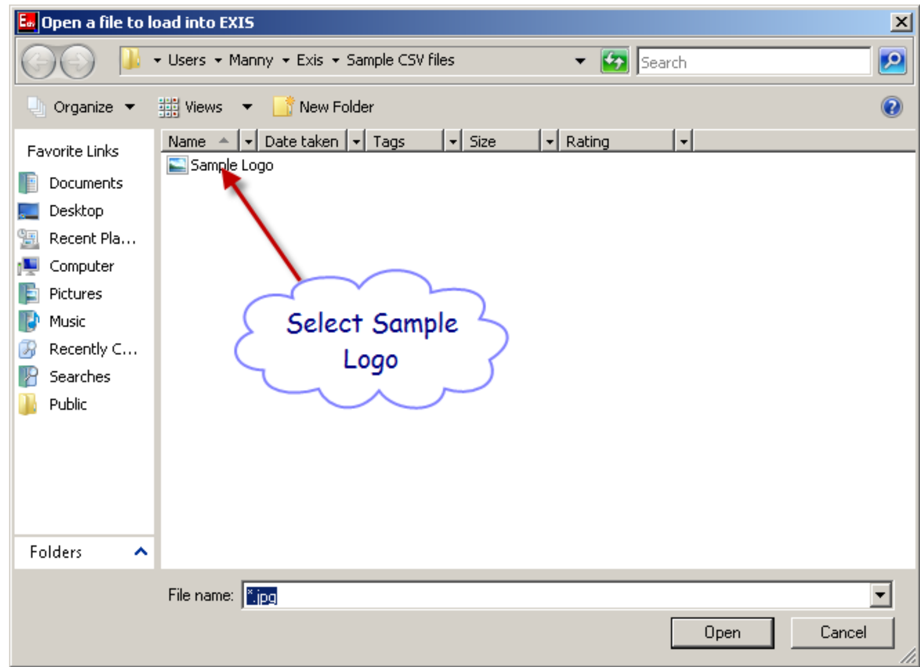
Select “Sample Logo” file.



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Confirm that the logo is uploaded. Then click "Replace existing logo with this image".

Close the wizard.

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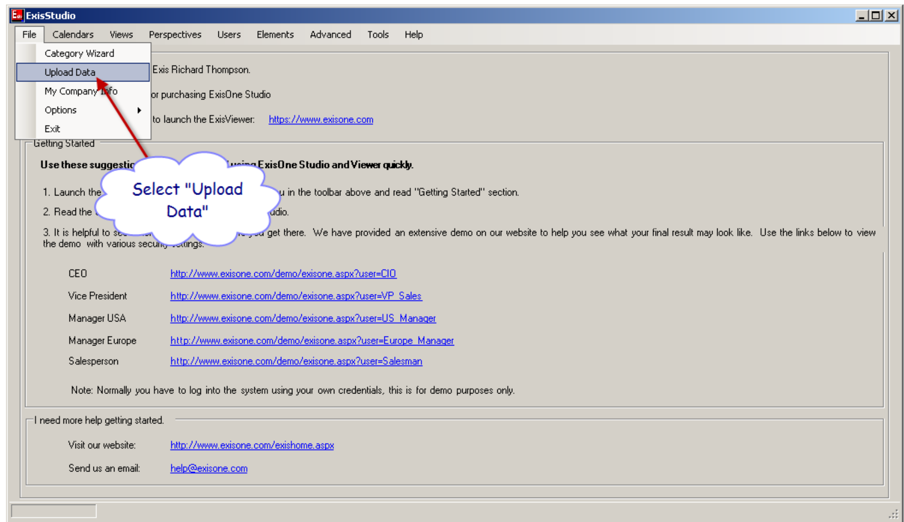
UPLOAD DATA

“Upload Data” wizard copies category data from your computer to ExisServer. The data must be in a delimited format, most commonly, comma separated values (CSV).

Start ExisStudio.

Select “Upload Data” from “File” menu.



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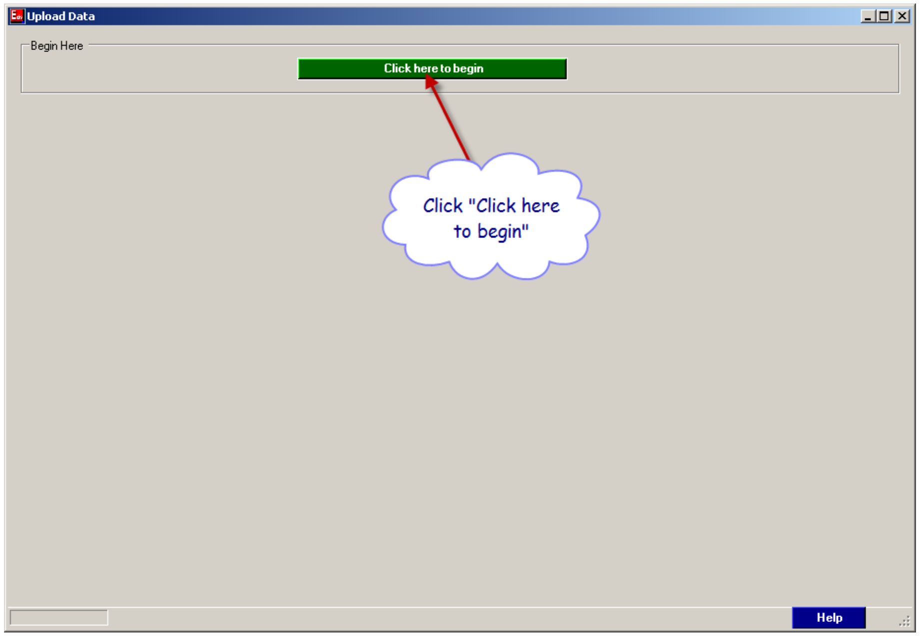
Click “Click here to begin” button.



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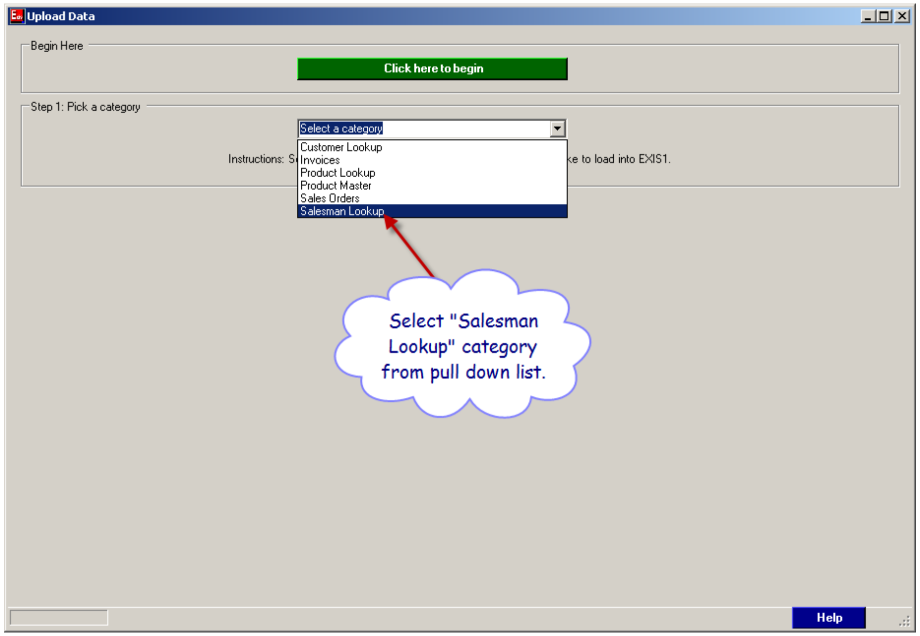
Select “Salesman Lookup”: category from drop down list.



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Click “Click Here to Select File” button to select the file on your computer for “Salesman Lookup” category.

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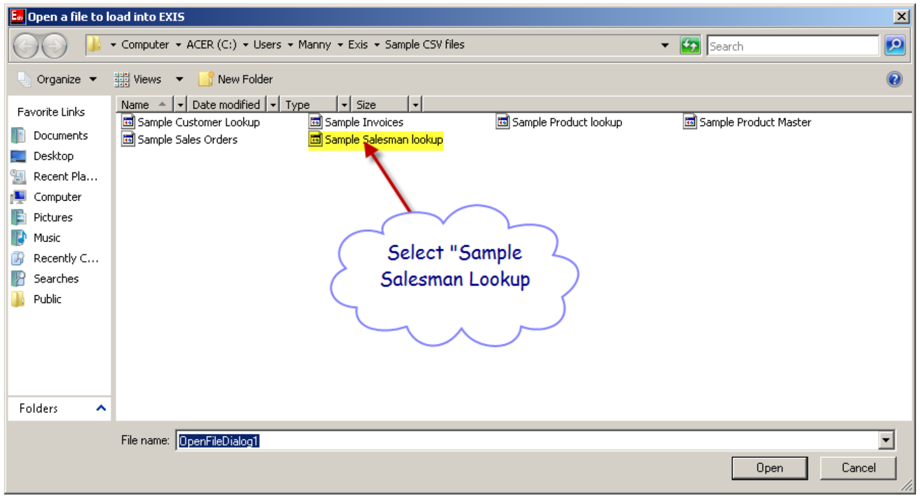
Select “Sample Salesman Lookup” file.



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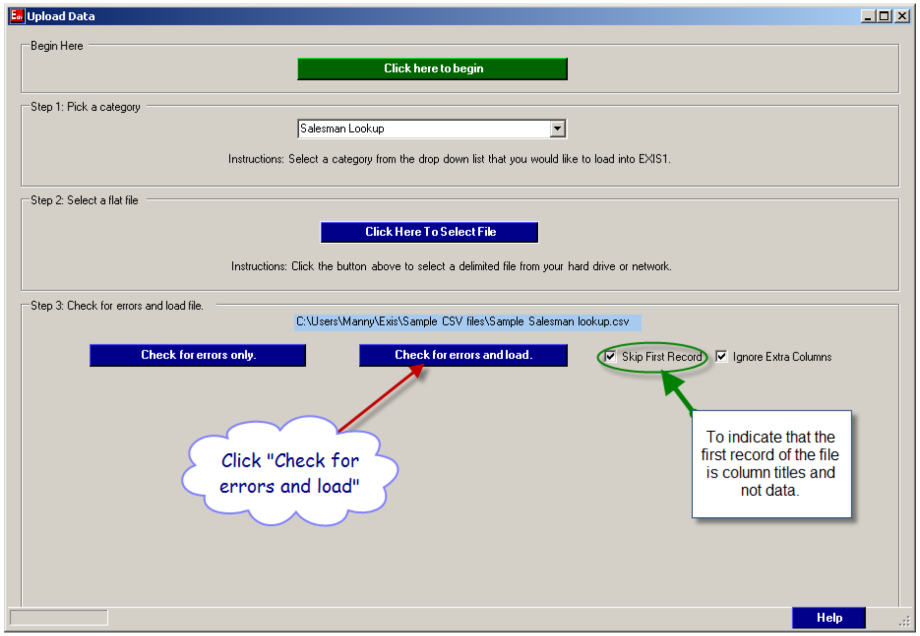
Click “Check for errors and load” button to start copying of data to the ExisServer. The “Check for errors only” button will scan the file for errors without sending any data to the ExisServer. The check box “Skip First Record” is to indicate that the first record in the file is not data. The check box “Ignore Extra Columns” is in case some or all records in the file have more columns than defined in the category.



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Now upload the following files:

Category	**File**
Product Lookup	Sample Product Lookup
Customer Lookup	Sample Customer Lookup
Product Master	Sample Product Master
Invoices	Sample Invoices
Sales Orders	Sample Sales Orders

Close "File Upload" wizard.

Depending on number of records uploaded, it may take from several minutes to a few hours for ExisOne to create data warehouse from your data. You can monitor the progress with ExisStudio – Tools > Logs > Upload Log Viewer.

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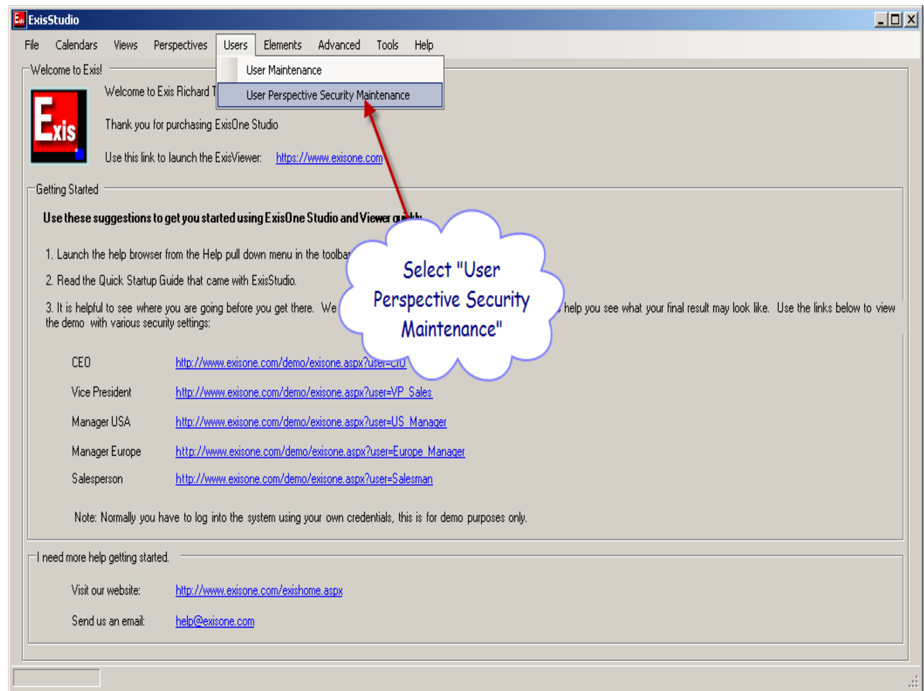
DEFINE USER SECURITY

User security should be defined after you have uploaded all initial transactional categories' data.

The user is only allowed to see those perspectives that have been assigned to that user in the user perspective maintenance here. Furthermore, not only can you restrict a user to a specific perspective, but also from a specific level in a perspective. E.G. in the previously defined "Corporate" perspective you can restrict the salesman user to data where the "CEO" through "Salesman" are pre-initialized.



Start ExisStudio.

Select "User Perspective Security Maintenance" from "Users" menu.

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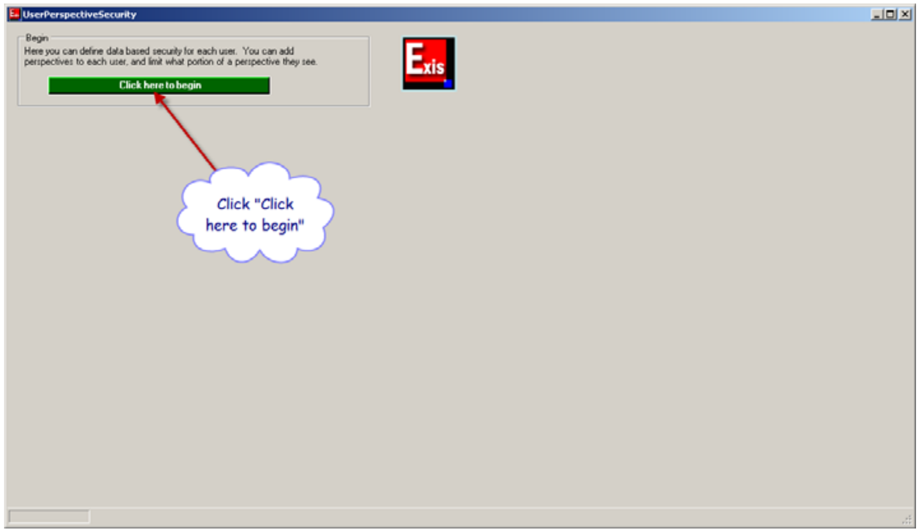
Click “Click here to begin”.



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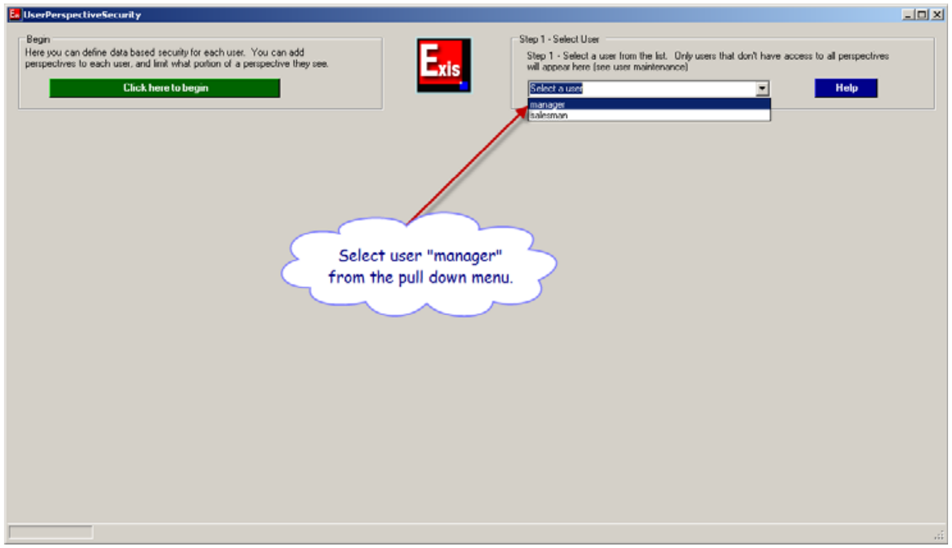
Note that user "CEO" is not in the drop down menu. This is because "CEO" is allowed unrestricted access to all perspectives.

Select user "manager" from the drop down menu.



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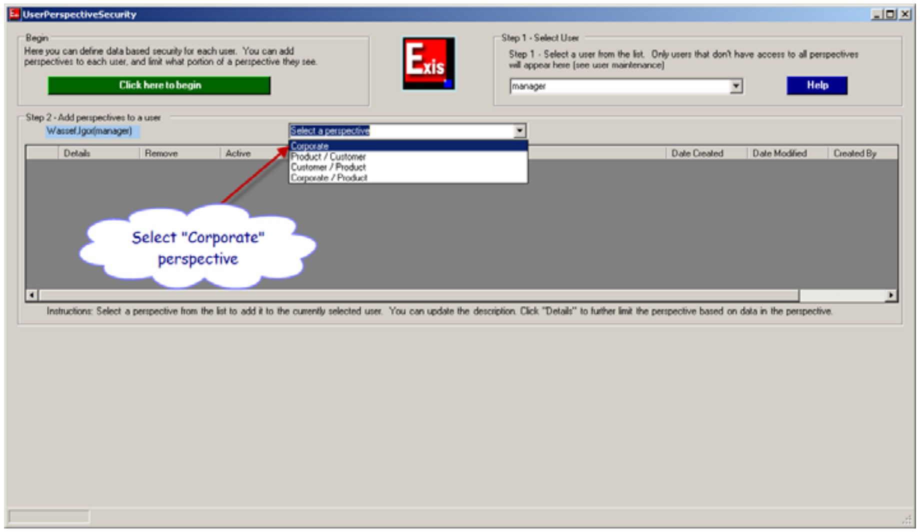
Add “Corporate” perspective for “manager”.



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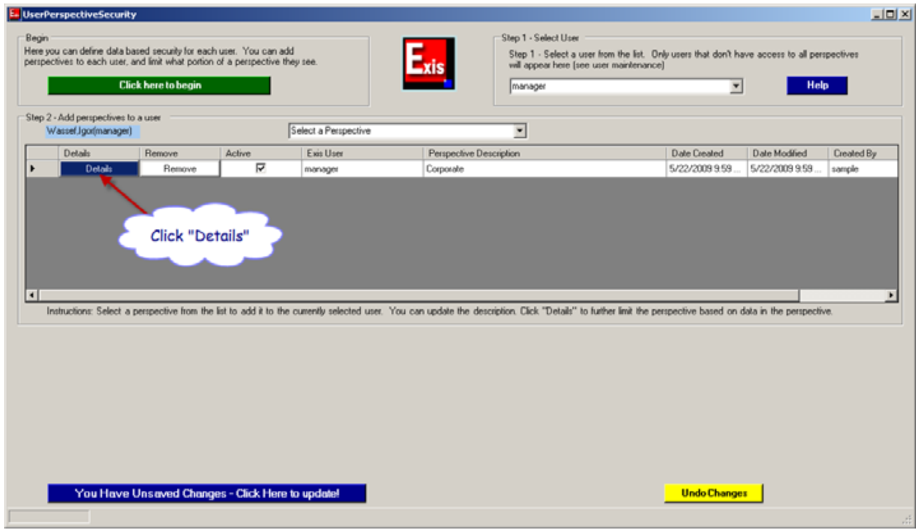
Click “Details” to specify restrictions.



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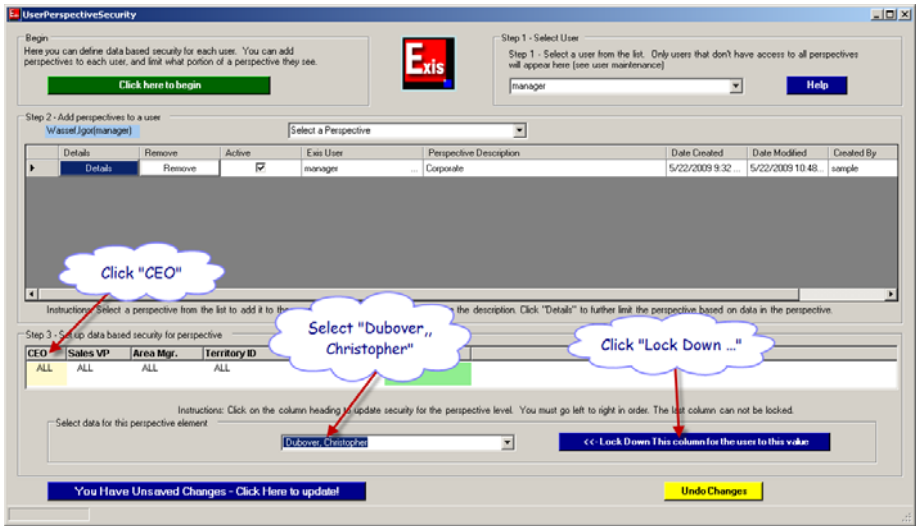
Note all elements of the perspectives with "All" under each. This is because as default, user is allowed access to all values of each of the elements in a perspective.

To restrict user only to his/her data you click on each element and select a value for it going from left to right.

To unlock, follow the reverse process. You can not lock the very last element in a perspective.

Click "CEO" and then select "Dubover, Christopher" from drop down list

Click "Lock down this column for the user to this value".



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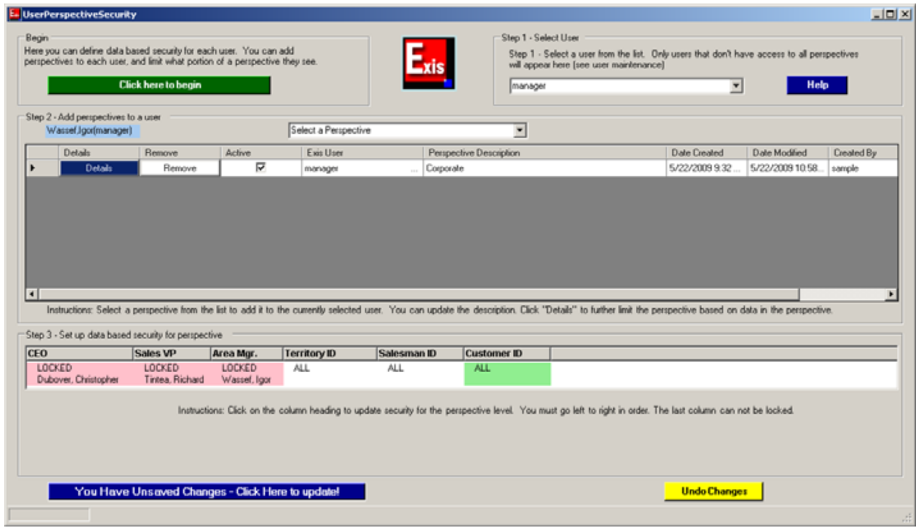
Click "You Have Unsaved Changes - Click Here to Update" button.



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Now give users, “manager” and “salesman” access to perspectives as shown below:

<table>
<tr><th>User</th><th>Perspective</th><th>Element</th><th>Data</th></tr>
<tr><td rowspan="11">manager</td><td rowspan="3">Product / Customer</td><td>Product</td><td>All</td></tr>
<tr><td>Product ID</td><td>All</td></tr>
<tr><td>Customer ID</td><td>All</td></tr>
<tr><td rowspan="3">Customer / Product</td><td>Parent Company</td><td>All</td></tr>
<tr><td>Customer ID</td><td>All</td></tr>
<tr><td>Product ID</td><td>All</td></tr>
<tr><td rowspan="5">Corporate / Product</td><td>CEO</td><td>Dubover, Christopher</td></tr>
<tr><td>Sales VP</td><td>Tintea, Richard</td></tr>
<tr><td>Area Mgr.</td><td>Wassef, Igor</td></tr>
<tr><td>Product</td><td>All</td></tr>
<tr><td>Product ID</td><td>All</td></tr>
<tr><td rowspan="6">salesman</td><td rowspan="6">Corporate</td><td>CEO</td><td>Dubover, Christopher</td></tr>
<tr><td>Sales VP</td><td>Tintea, Richard</td></tr>
<tr><td>Area Mgr.</td><td>Wassef, Igor</td></tr>
<tr><td>Territory ID</td><td>Stillman, Howard</td></tr>
<tr><td>Salesman ID</td><td>All</td></tr>
<tr><td>Customer ID</td><td>All</td></tr>
</table>

We hope this guide has helped you to implement ExisOne business intelligence system. If you have any comments or questions, please contact us at:

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