ExisOne
Guide for the Very Impatient

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This guide will help you get started very quickly with a minimum of time commitment on your part. This exercise should take you no more then ½ an hour to complete.

Included on the media that came with ExisStudio is a sample csv file called "simpletest.csv". We will be using that file in this exercise.

We will assume that you have successfully gone thru the registration process and have logged into the system.

Step 1: **Erase All Data**

Let's make sure we start with a blank slate. This step is only necessary IF you have previously loaded some data. If not, proceed to step 2.

Navigate to Tools → Data → Erase

Select the tab that says "Erase All Data and Definitions".

Click on "Erase All Definitions and Data"

Click on "Confirm All Definitions and Data Erase"

Step 2: **Category Wizard**

Create one simple category using category wizard.

Navigate to File → Category Wizard

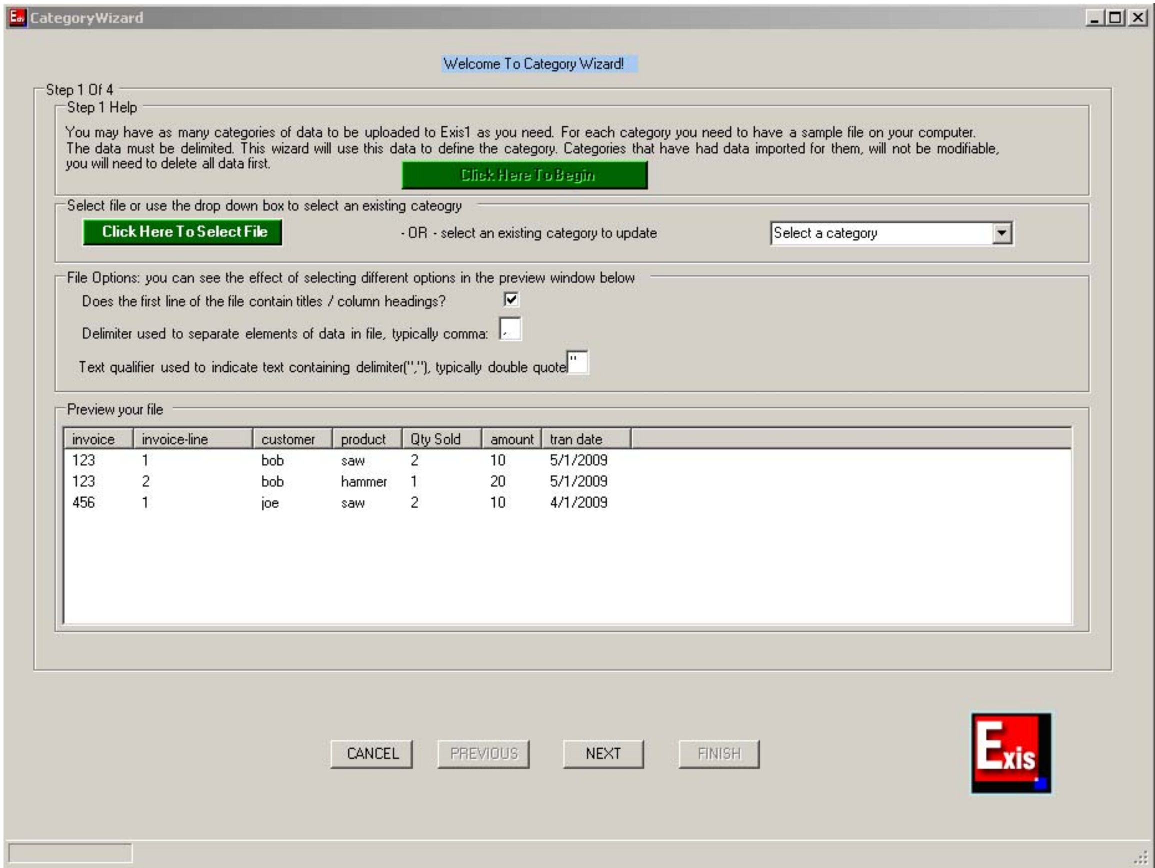
Click on "Click Here To Begin"

Click on "Click Here To Select File"

Navigate to where you have the software and locate the "simpletest.csv" file.

Click "Open"

If you made it to this point, your screen should look like this:



Click "Next"

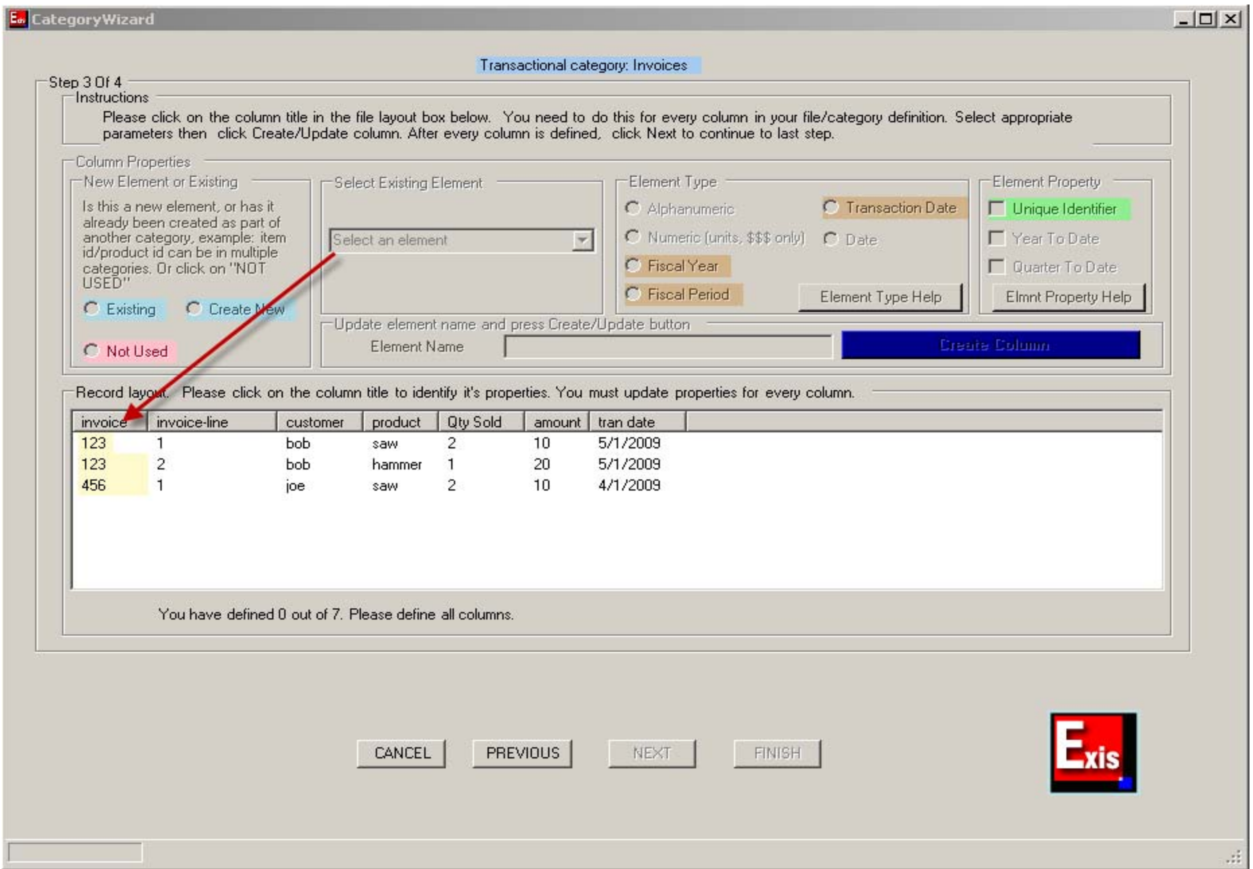
In the step 2 of the category wizard type in "Invoices" for the category name.

Leave the other defaults as is.

Click Next

In this step we will define some columns.

Click on the column title like so:



The invoice column will light up in yellow (selected color).

Click on the radio button “Create New”

Click on “Alphanumeric” in Element Type box.

Click on “Unique Identifier” in the Element Property box.

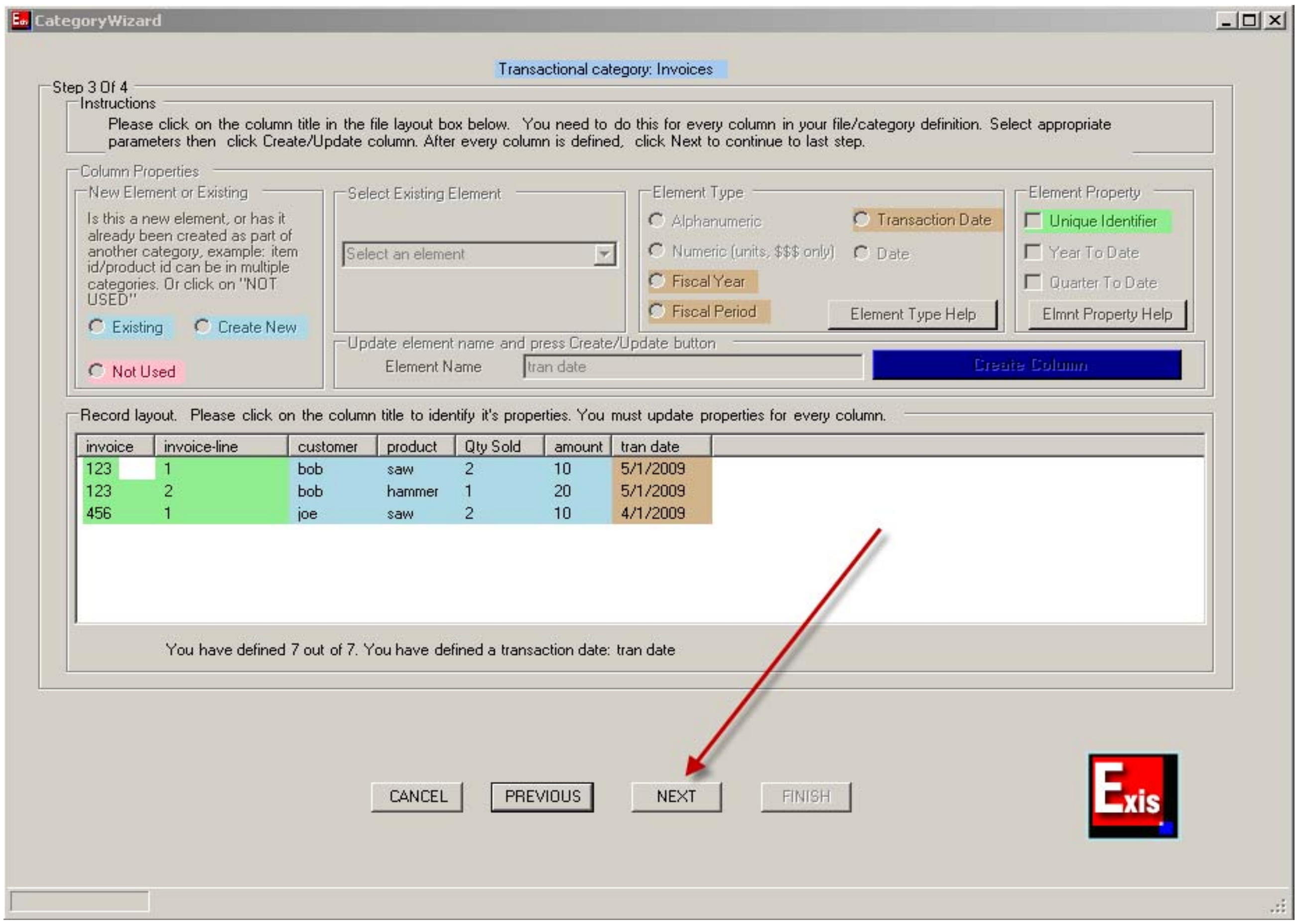
Leave the element name as is (should say “invoice”)

Click on “Create Column” – the column will change the color to green (index color).

Repeat the same basic process for the next 5 columns as follows:

Invoice-line → Create New → Alphanumeric → Unique Identifier → Create Column
Customer → Create New → Alphanumeric → Create Column
Product → Create New → Alphanumeric → Create Column
Qty Sold → Create New → Numeric → Create Column
Amount → Create New → Numeric → Create Column
Tran-date → Create New → Transaction Date → Create Column

At the end of this your screen should look like this:



Click “Next” to continue

Leave everything as is on this screen and press “Finish”

Click on “Exis Category Wizard”.

Step 3: **Create a Perspective**

Navigate to Perspectives → Perspective Maintenance

Click on “Click Here To Begin”

Click on the Orange Plus Sign in the tool bar row in the upper portion of the screen (new inactive perspective will be created)

Important: Check off the “Active/Inactive” box in the row of the perspective that you just created.

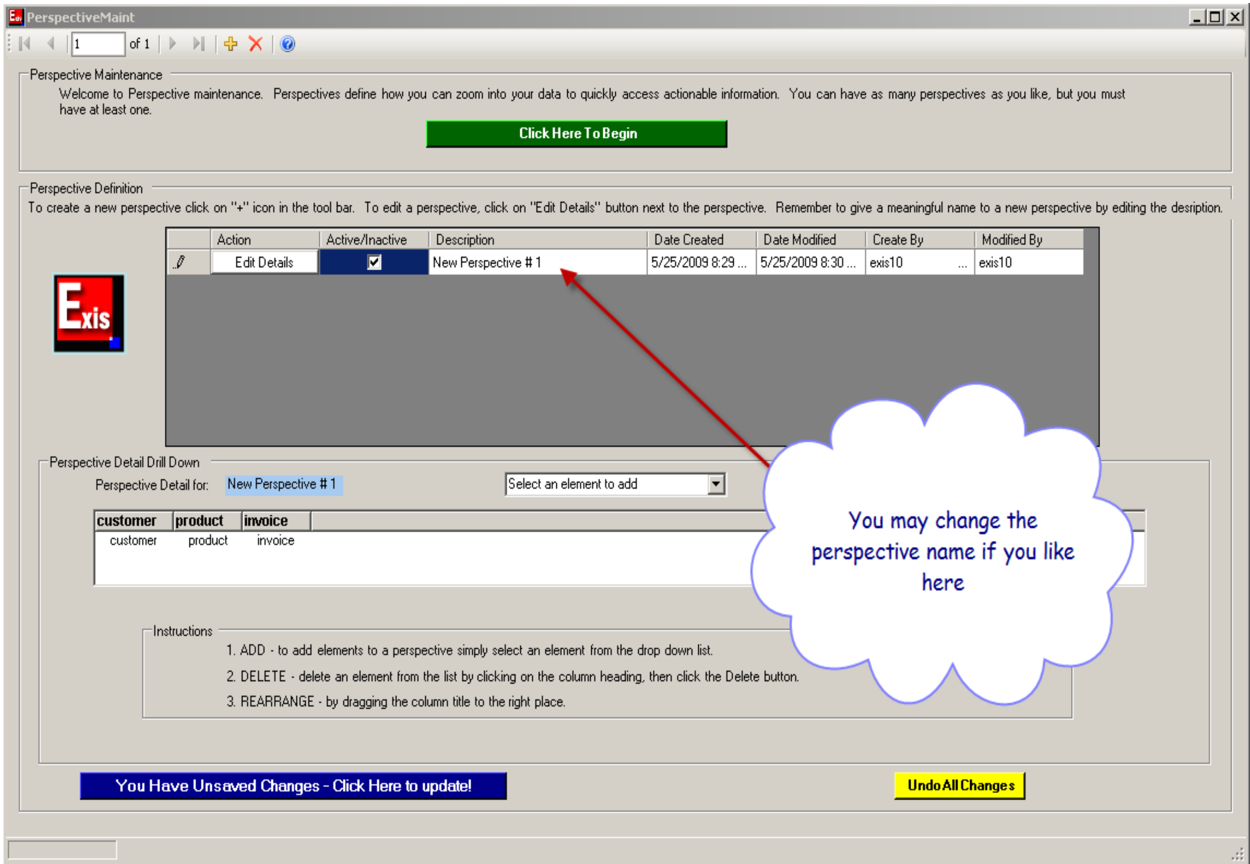
Click on “Edit Details” in the Perspective Definition box in the row of the newly created perspective.

From a “Select an element to add” select “customer” (it will be added to the perspective)

From the “Select an element to add” select “product”

From the “Select an element to add” select “invoice”

At this point your Perspective definition screen should look like this:



Click on the "You have Unsaved Changes" button to update Exis.

Close the perspective screen.

Step 3: <u>**Create a View**</u>

Navigate to Views → View Maintenance

Click on "Click Here To Begin"

Click on the orange plus (+) sign in the tool bar row to create a new view (it will be automatically created as active).

Click on "Edit Details" next to the view you just created in the View List box.

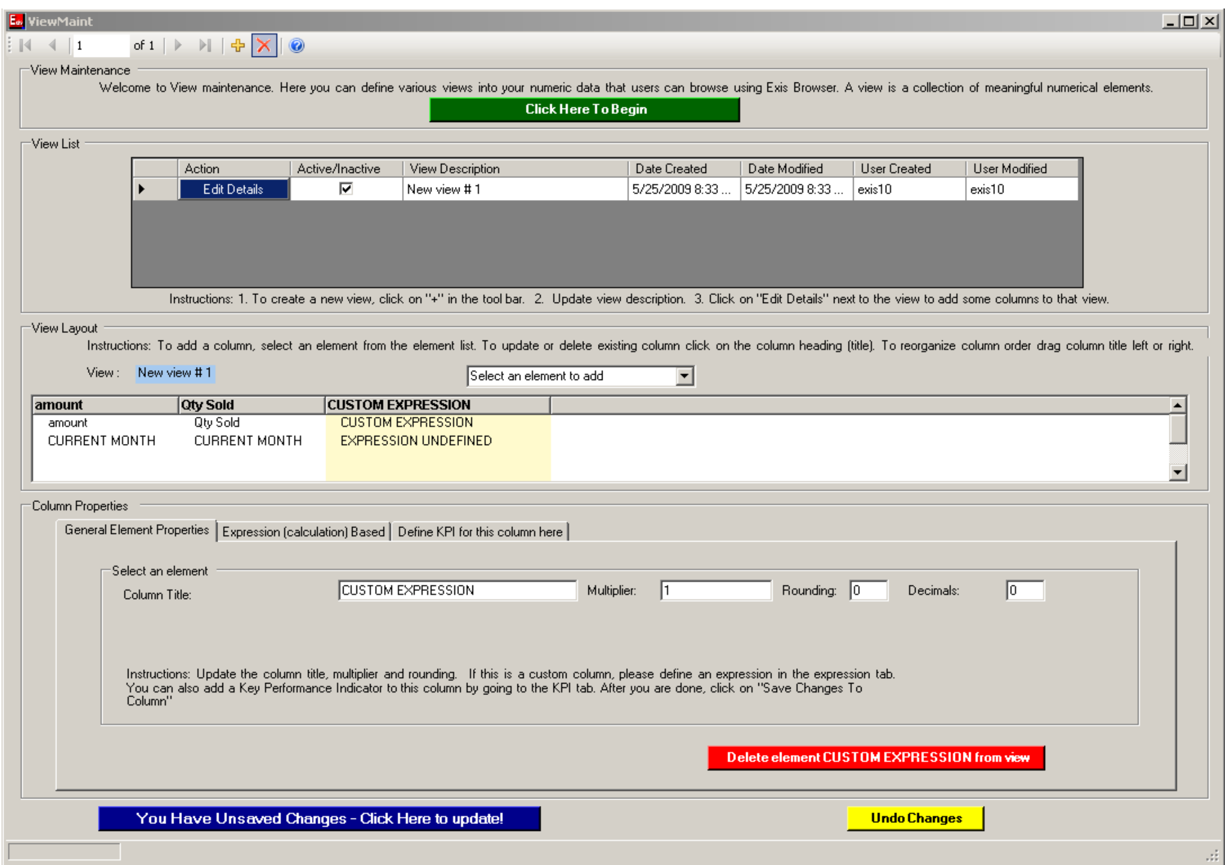
From the "Select an Element to Add" drop down select "amount". It will be automatically added to your view.

From the "Select an Element to Add" drop down select "Qty Sold". It will be automatically added to your view.

From the "Select an Element to Add" drop down select "Custom Expression"

Change the title of the "Custom Expression" in the Column Properties window to say "Sample Calculated Column"

Your View screen should look like this:



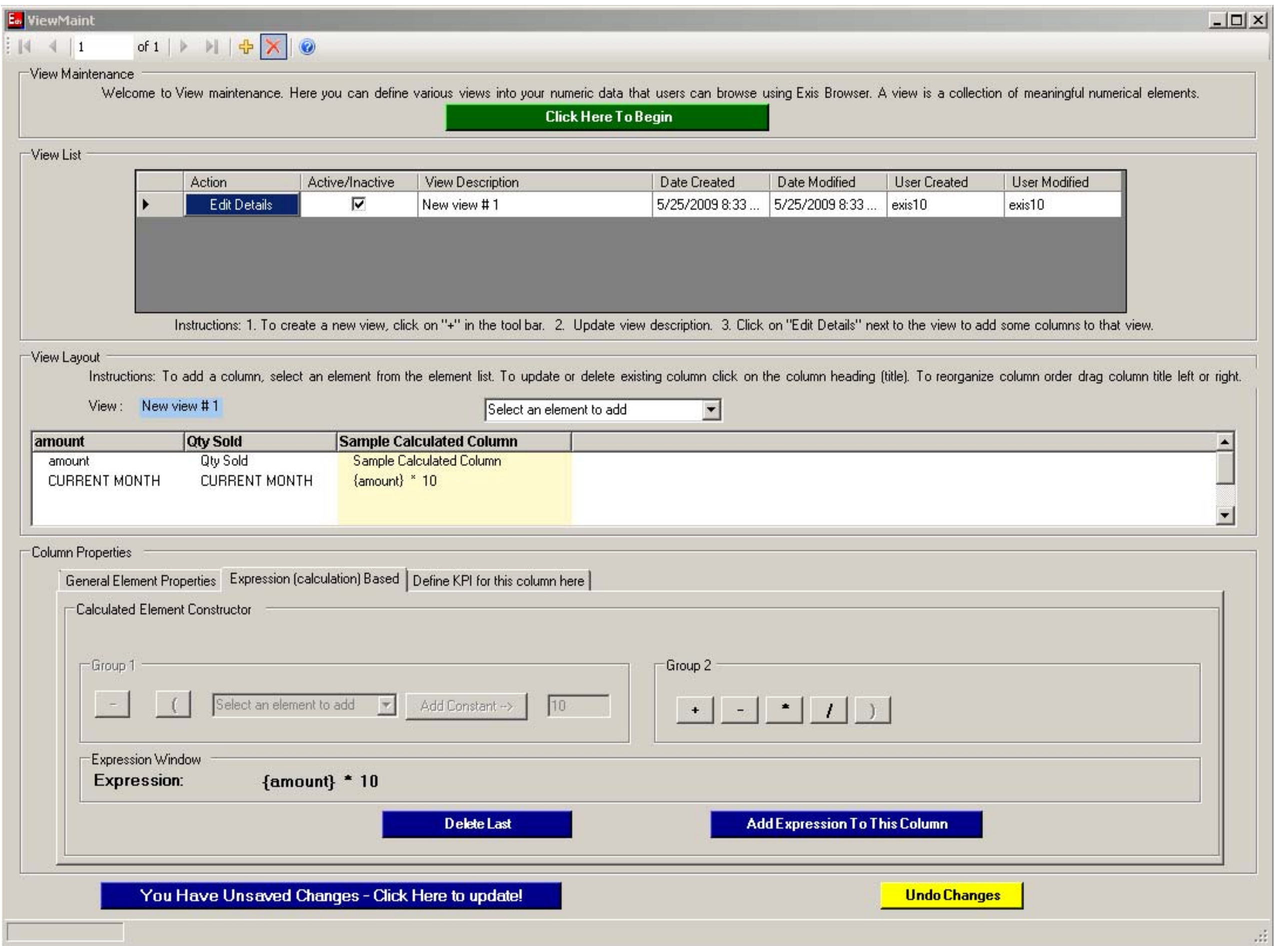
Click on the Expression calculation.

In the “Select an element to add” drop down select “Amount”

From the “Group 2” box click on a multiplication sign

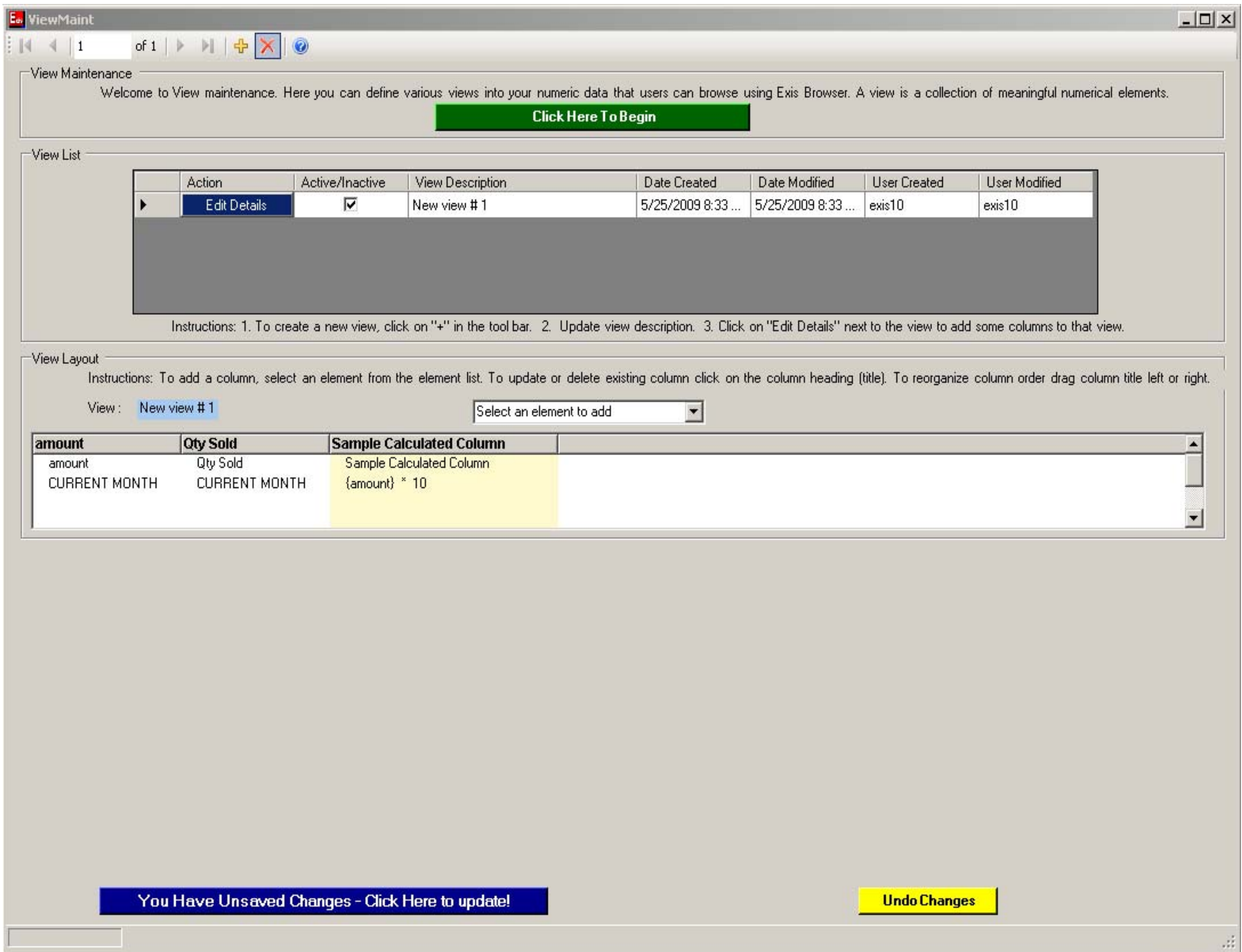
In the “Add Constant” box type in 10, click “Add Constant”

Your window should look like this:



Click on “Add expression to this column”

The final screen should look like this:



Click on the "You Have Unsaved Changes – Click Here to update" button. Wait for the screen to refresh.

Close the view maintenance screen.

Step 4: **Upload Data**

Navigate to File → Upload data

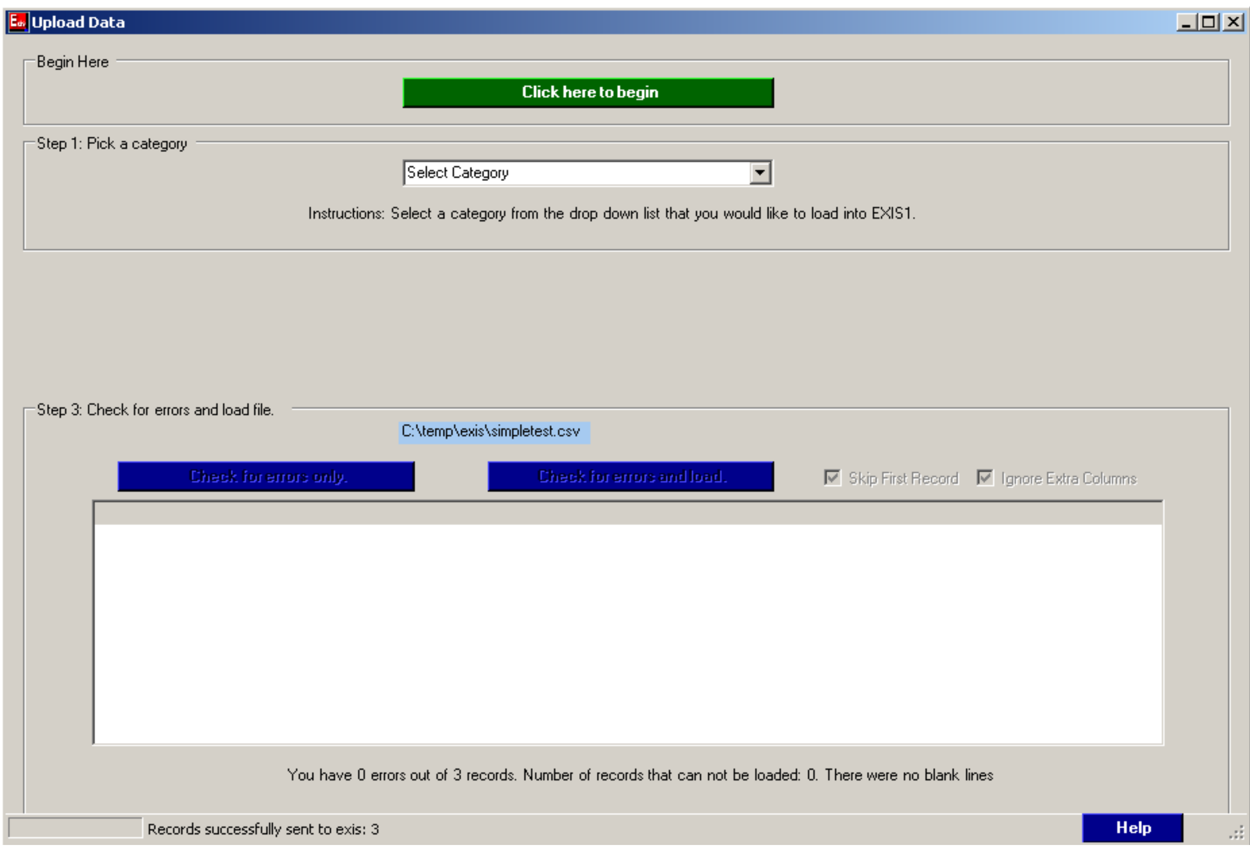
Click on "Click Here To Begin"

From the "Select a category" drop down list select "invoices".

Click on the "Click Here to Select A file" button. This will bring up the open file dialog. Navigate once again to the "simpletest.csv" file, and click open.

Click on "Check for Errors and Load"

After this step your screen should look like this:

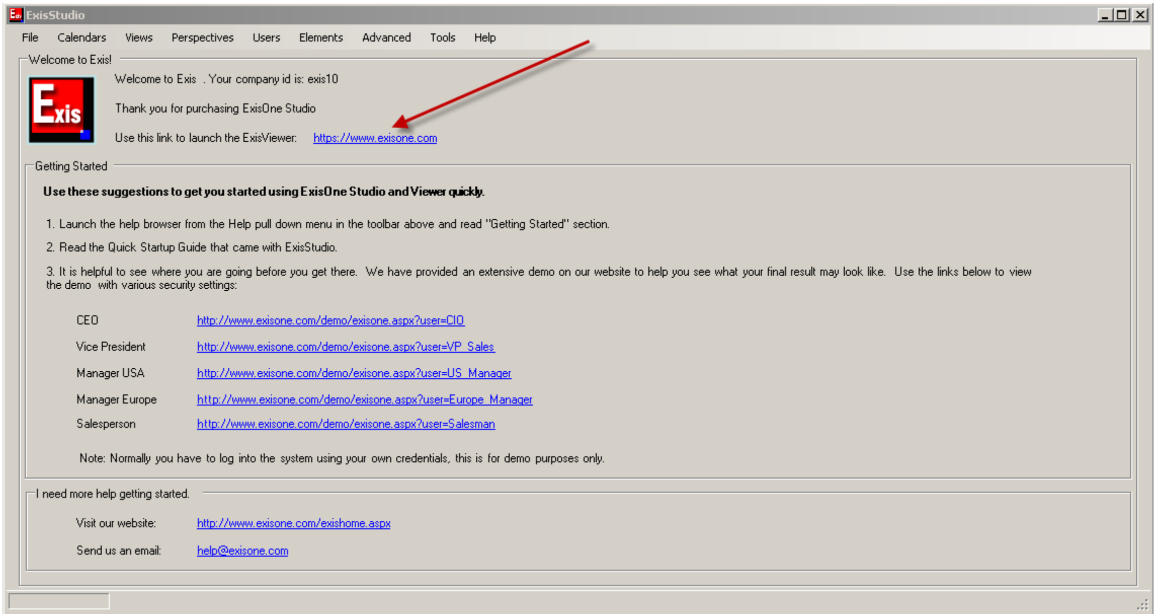


Congratulations! You have successfully loaded data in ExisOne Business Intelligence System.

Step 5: <u>Use ExisOne Online Viewer to examine your data</u>

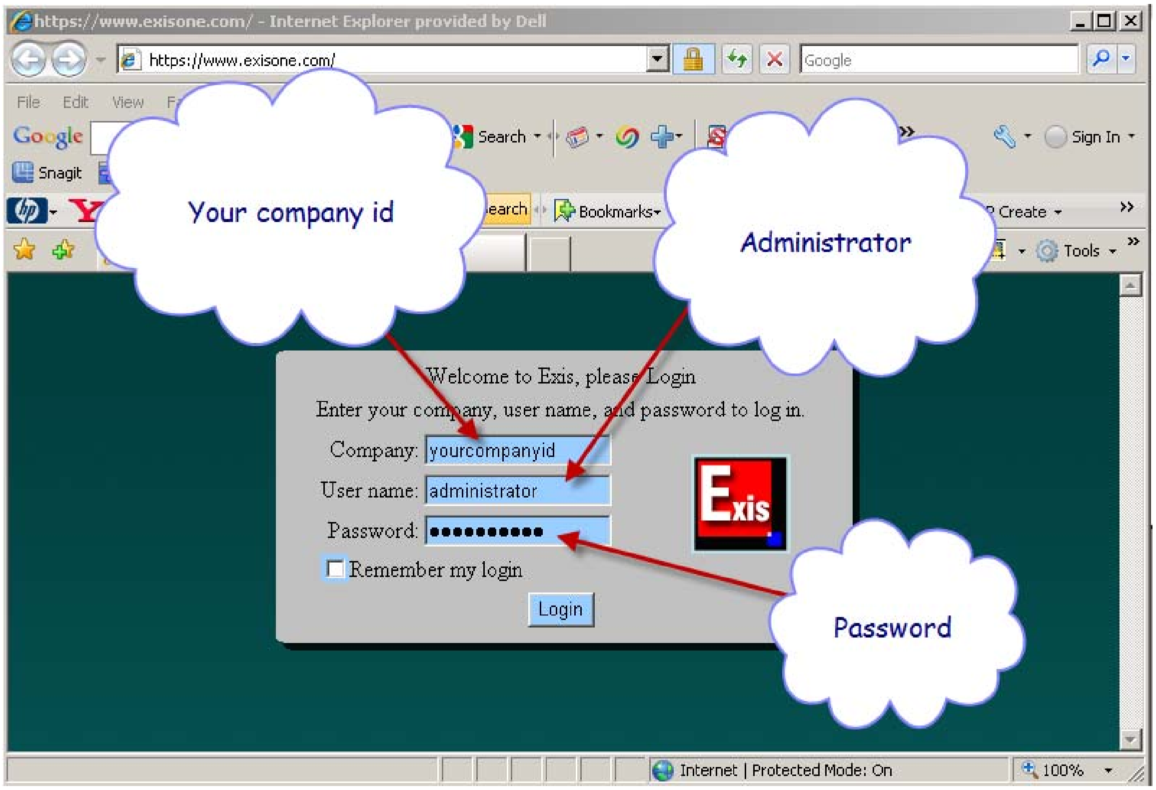
Click on the launch link in ExisViewer

Or just go to the https://www.exisone.com

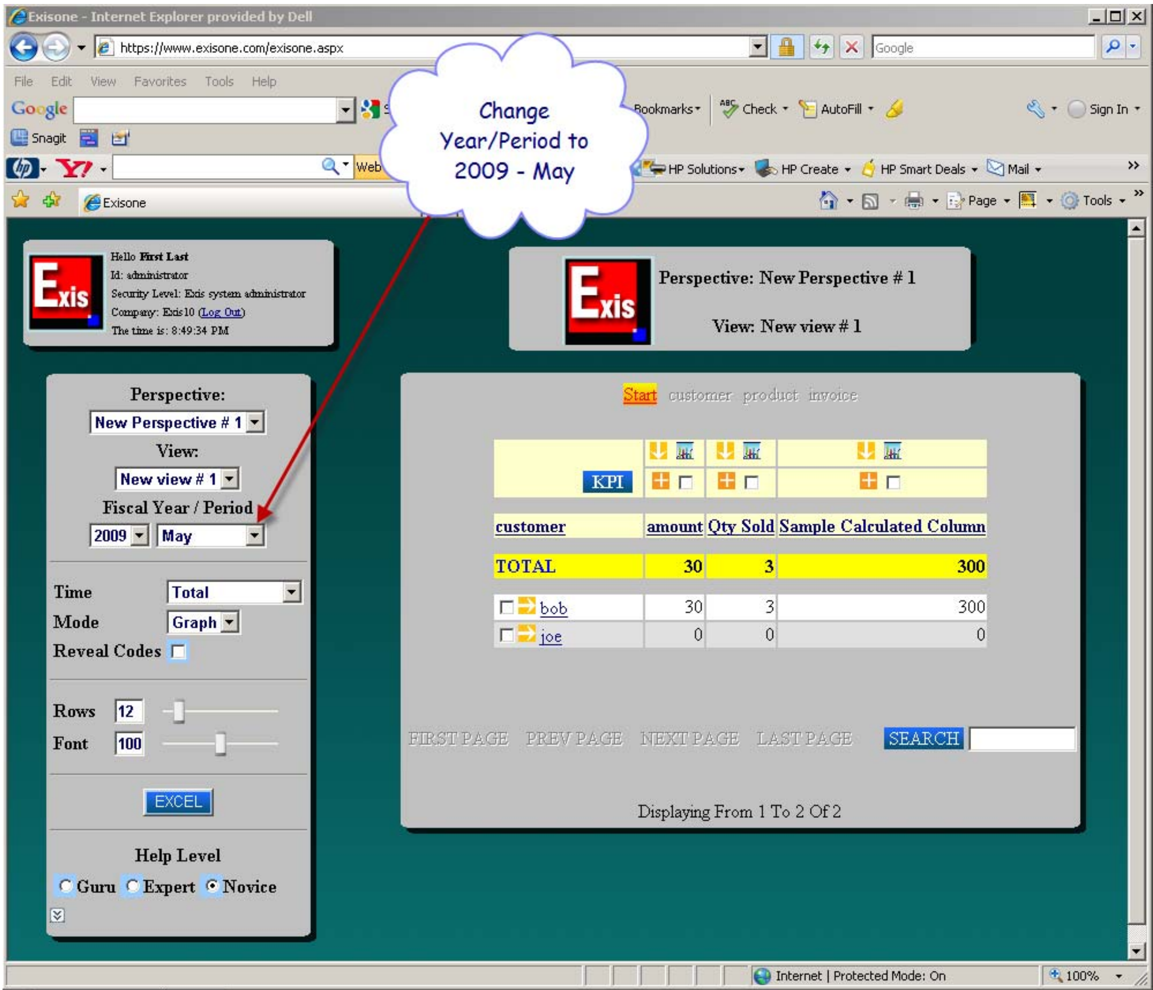


When the browser opens the log in screen, type in your credentials like so:

1. Company id is the id you received from Exis
2. Administrator for user id
3. Password is the same password you received from Exis



Once you log in to the view you will see something like the screen image on next page.



Practice drilling down by clicking on "Bob" in the main portion of the viewer.

To go back, click on either "←Back" or "Start".

Try playing with different features of the viewer.

1. Click on the number 30, you will see a line graph.
2. From the left panel select "Details" in the mode drop down. Click on number "30" again, and you will see the invoice that you loaded into Exis.

Go back to the sample test spreadsheet, and add some more simple data. Load it into Exis again.

Remember, you can have as many perspectives and views as you like.

The system will cross tabulate everything for you correctly.

Now that you have seen what the system can do, it is important that you go thru the Quick Startup guide to learn about other features of the system.

Now you are ready to use ExisOne!