

**ExisOne**  
**Guide for the Very**  
**Impatient**

## Guide for the Very Impatient

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 than 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:

Step 1 Of 4

Welcome To Category Wizard!

Step 1 Help

You may have as many categories of data to be uploaded to Exis1 as you need. For each category you need to have a sample file on your computer. The data must be delimited. This wizard will use this data to define the category. Categories that have had data imported for them, will not be modifiable, you will need to delete all data first.

[Click Here To Begin](#)

Select file or use the drop down box to select an existing category

[Click Here To Select File](#) - OR - select an existing category to update

Select a category

File Options: you can see the effect of selecting different options in the preview window below

Does the first line of the file contain titles / column headings? ☒

Delimiter used to separate elements of data in file, typically comma:

Text qualifier used to indicate text containing delimiter(" "), typically double quote:

Preview your file

invoice	invoice-line	customer	product	Qty Sold	amount	tran date
123	1	bob	saw	2	10	5/1/2009
123	2	bob	hammer	1	20	5/1/2009
456	1	joe	saw	2	10	4/1/2009

CANCEL PREVIOUS NEXT FINISH

Exis

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:

Step 3 Of 4  
Transactional category: Invoices

Instructions  
Please click on the column title in the file layout box below. You need to do this for every column in your file/category definition. Select appropriate parameters then click Create/Update column. After every column is defined, click Next to continue to last step.

Column Properties  
New Element or Existing  
Is this a new element, or has it already been created as part of another category, example: item id/product id can be in multiple categories. Or click on 'NOT USED'  
☐ Existing ☐ Create New  
☐ Not Used

Select Existing Element  
Select an element

Element Type  
☐ Alphanumeric ☐ Transaction Date  
☐ Numeric (units, \$\$\$ only) ☐ Date  
☐ Fiscal Year ☐ Fiscal Period  
Element Type Help

Element Property  
☒ Unique Identifier  
☐ Year To Date  
☐ Quarter To Date  
Elmnt Property Help

Update element name and press Create/Update button  
Element Name  Create Column

Record layout. Please click on the column title to identify it's properties. You must update properties for every column.

invoice	invoice-line	customer	product	Qty Sold	amount	tran date
123	1	bob	saw	2	10	5/1/2009
123	2	bob	hammer	1	20	5/1/2009
456	1	joe	saw	2	10	4/1/2009

You have defined 0 out of 7. Please define all columns.

CANCEL PREVIOUS NEXT FINISH

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:

Step 3 Of 4

Transactional category: Invoices

Instructions: Please click on the column title in the file layout box below. You need to do this for every column in your file/category definition. Select appropriate parameters then click Create/Update column. After every column is defined, click Next to continue to last step.

Column Properties

New Element or Existing: ☐ Existing ☒ Create New ☐ Not Used

Select Existing Element:

Element Type: ☒ Alphanumeric ☐ Transaction Date ☐ Numeric (units, \$\$\$ only) ☐ Date ☐ Fiscal Year ☐ Fiscal Period

Element Property: ☒ Unique Identifier ☐ Year To Date ☐ Quarter To Date

Update element name and press Create/Update button: Element Name

Record layout. Please click on the column title to identify it's properties. You must update properties for every column.

invoice	invoice-line	customer	product	Qty Sold	amount	tran date
123	1	bob	saw	2	10	5/1/2009
123	2	bob	hammer	1	20	5/1/2009
456	1	joe	saw	2	10	4/1/2009

You have defined 7 out of 7. You have defined a transaction date: tran date

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.

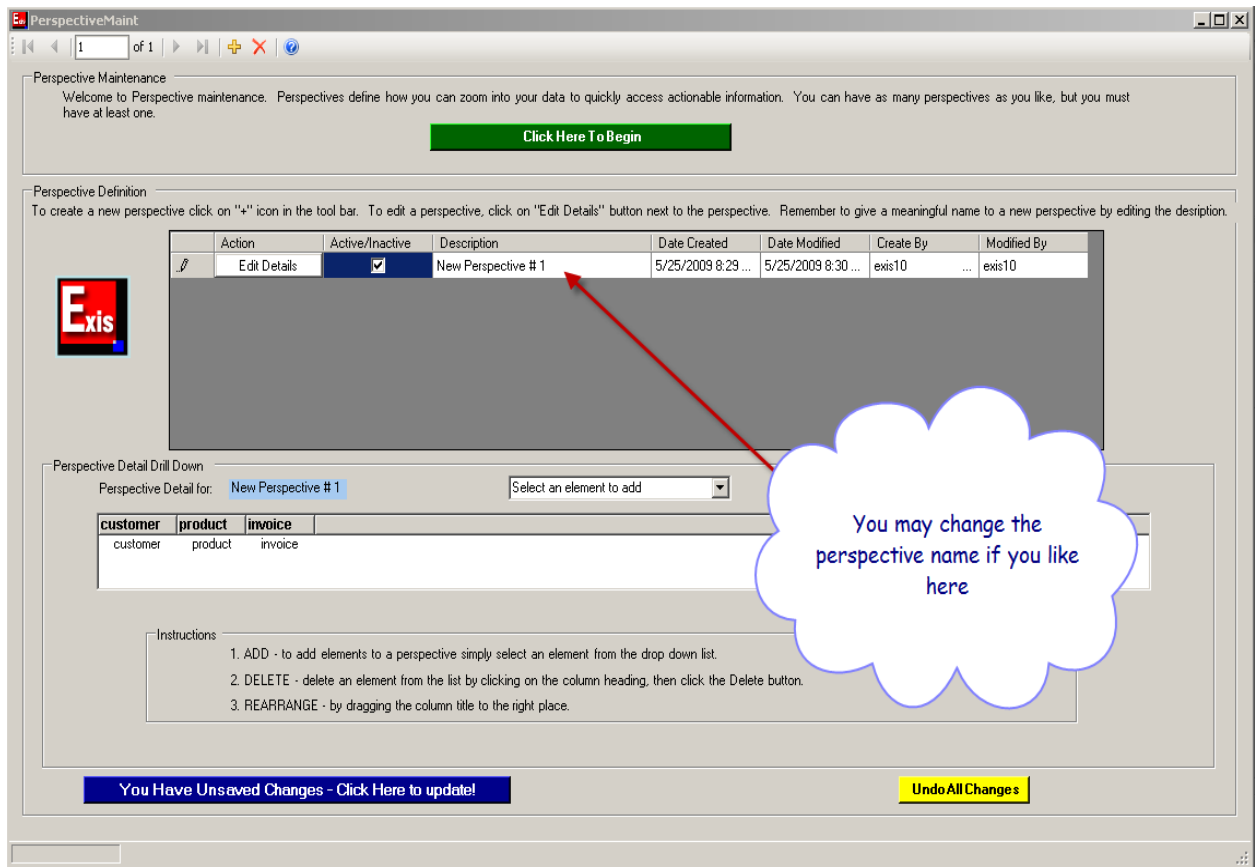
Click on “Edit Details” in the Perspective Definition box in the row of the newly created perspective.

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: Create a View

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:

The screenshot shows the ViewMaint application window. The top section is 'View Maintenance' with a welcome message and a 'Click Here To Begin' button. Below is the 'View List' section, which contains a table with columns: Action, Active/Inactive, View Description, Date Created, Date Modified, User Created, and User Modified. The table has one row for 'New view #1' with an 'Edit Details' button. Below the table are instructions: '1. To create a new view, click on "+" in the tool bar. 2. Update view description. 3. Click on "Edit Details" next to the view to add some columns to that view.'

The 'View Layout' section shows instructions for adding, updating, deleting, and reorganizing columns. It includes a dropdown menu 'Select an element to add' and a table with columns: amount, Qty Sold, and CUSTOM EXPRESSION. The table has two rows: 'amount' and 'CURRENT MONTH'. The 'CUSTOM EXPRESSION' column has a value of 'EXPRESSION UNDEFINED'.

The 'Column Properties' section is divided into 'General Element Properties' and 'Expression (calculation) Based'. The 'General Element Properties' tab is active, showing a 'Select an element' dropdown with 'CUSTOM EXPRESSION' selected. Below this are input fields for 'Column Title', 'Multiplier', 'Rounding', and 'Decimals'. The 'Column Title' field contains 'CUSTOM EXPRESSION'. Below these fields are instructions: 'Update the column title, multiplier and rounding. If this is a custom column, please define an expression in the expression tab. You can also add a Key Performance Indicator to this column by going to the KPI tab. After you are done, click on "Save Changes To Column"'. At the bottom of the 'Column Properties' section is a red button that says 'Delete element CUSTOM EXPRESSION from view'.

At the bottom of the application window, there are two buttons: 'You Have Unsaved Changes - Click Here to update!' and 'Undo Changes'.



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:

ViewMaint

View Maintenance

Welcome to View maintenance. Here you can define various views into your numeric data that users can browse using Exis Browser. A view is a collection of meaningful numerical elements.

[Click Here To Begin](#)

View List

Action	Active/Inactive	View Description	Date Created	Date Modified	User Created	User Modified
<a href="#">Edit Details</a>	<input checked="" type="checkbox"/>	New view # 1	5/25/2009 8:33 ...	5/25/2009 8:33 ...	exis10	exis10

Instructions: 1. To create a new view, click on "+" in the tool bar. 2. Update view description. 3. Click on "Edit Details" next to the view to add some columns to that view.

View Layout

Instructions: To add a column, select an element from the element list. To update or delete existing column click on the column heading (title). To reorganize column order drag column title left or right.

View : [New view # 1](#)

Select an element to add

amount	Qty Sold	Sample Calculated Column
amount	Qty Sold	Sample Calculated Column
CURRENT MONTH	CURRENT MONTH	{amount} * 10

Column Properties

General Element Properties | Expression (calculation) Based | Define KPI for this column here

Calculated Element Constructor

Group 1

- ( Select an element to add Add Constant -> 10

Group 2

+ - \* / )

Expression Window

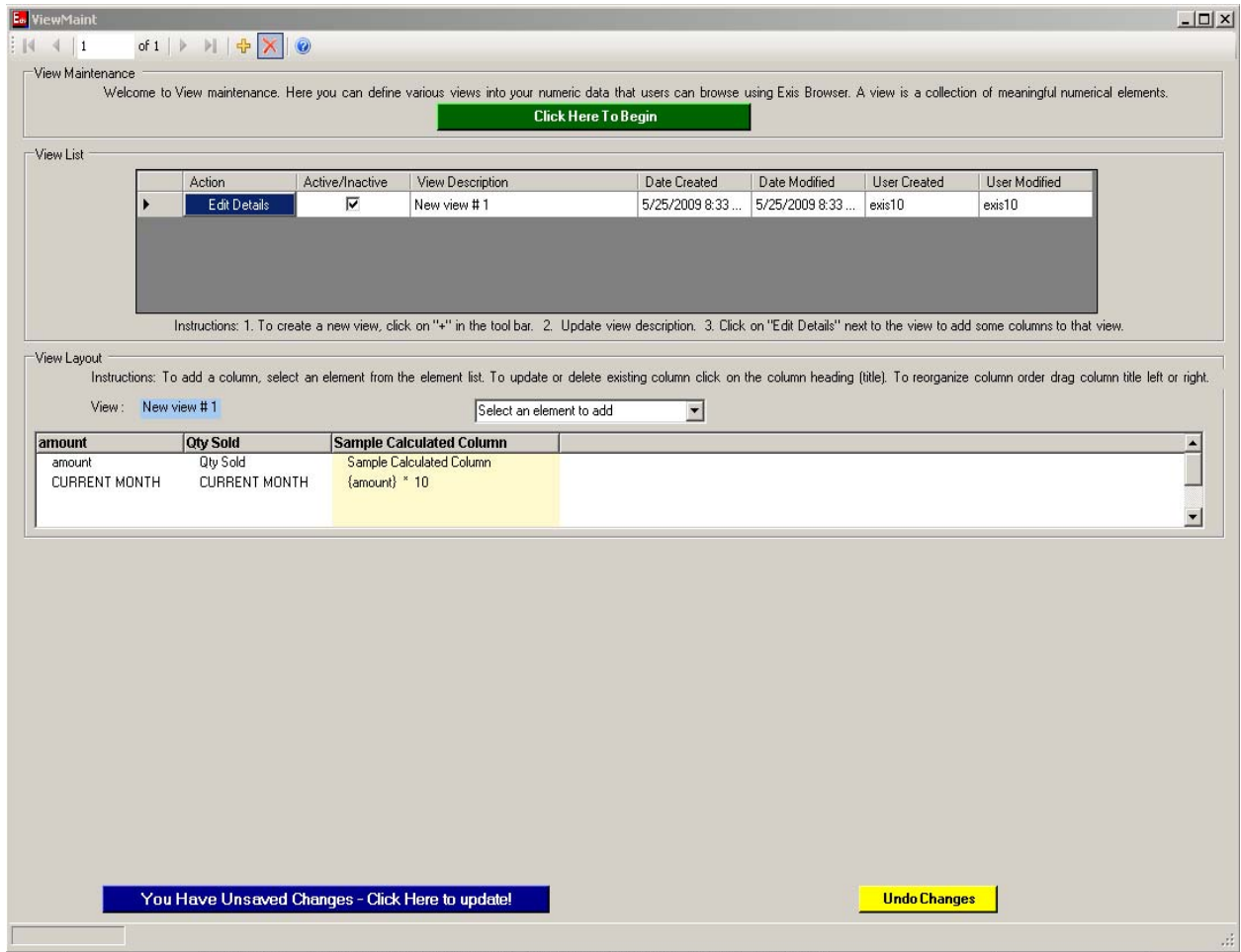
Expression: {amount} \* 10

Delete Last Add Expression To This Column

You Have Unsaved Changes - Click Here to update! Undo Changes

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

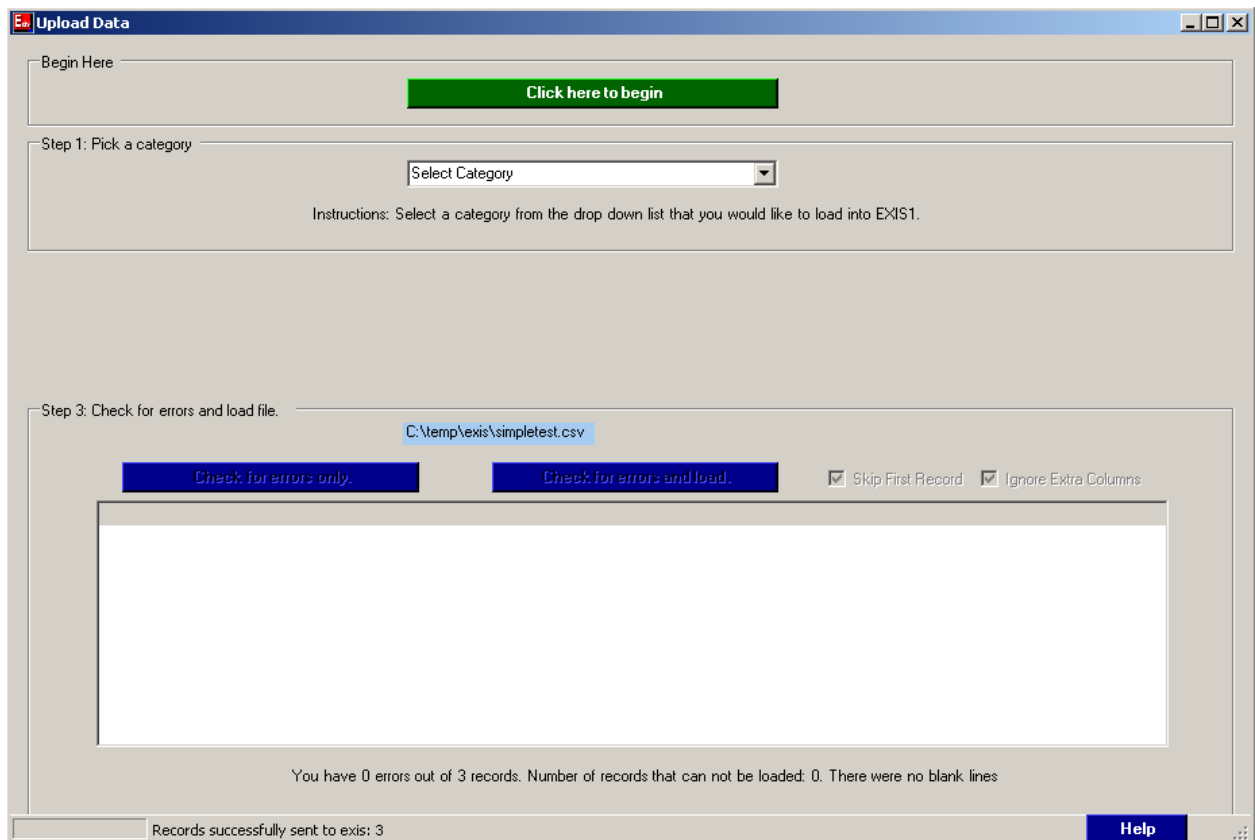
Click on “Click Here To Begin”

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:

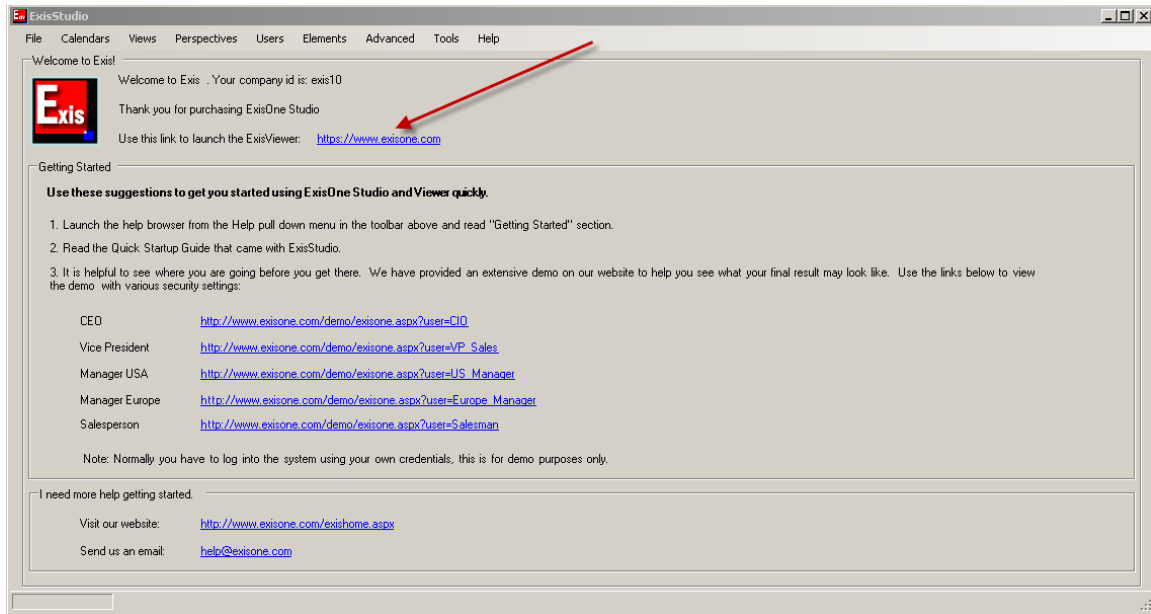


Congratulations! You have successfully loaded data in ExisOne Business Intelligence System.

## Step 5: Use ExisOne Online Viewer to examine your data

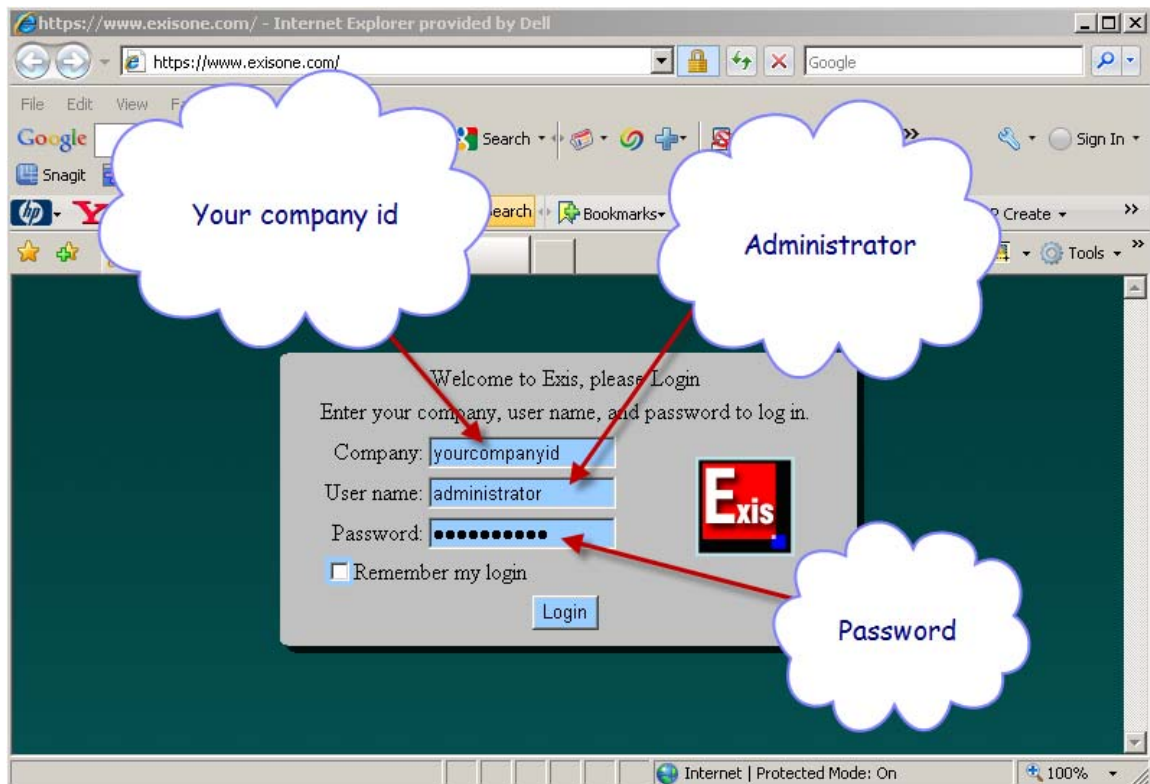
Click on the launch link in ExisViewer

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

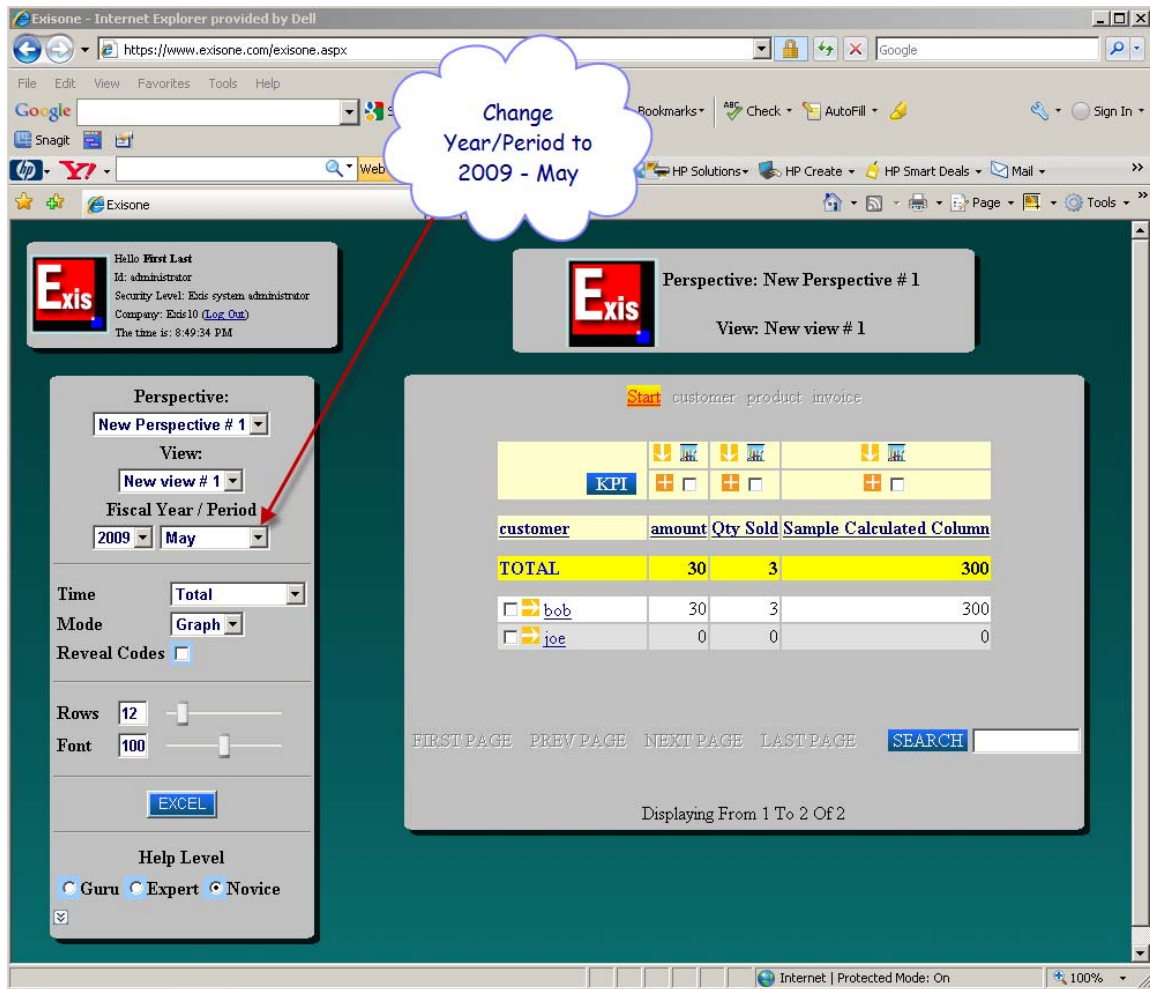


When the browser opens the log in screen, type in your credentials like so:

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!