

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.

TABLE OF CONTENTS

DESIGN GOALS	1
GLOSSARY OF TERMS.....	2
EXISONE FEATURES	5
STEPS TO IMPLEMENT EXISONE	9
INSTALLING EXISSTUDIO	10
START EXISSTUDIO	13
EXISSTUDIO TUTORIAL.....	14

DEFINE FISCAL CALENDAR.....	15
DEFINE CATEGORIES.....	17
DEFINE LOOKUP TABLES.....	19
DEFINE COLUMNS.....	24
DEFINE MASTER FILES.....	34
DEFINE TRANSACTIONAL DATA.....	43
CALCULATED ELEMENTS.....	62
EXPRESSION BUILDER.....	66
RELATED ELEMENTS	73
DEFINE VIRTUAL ELEMENTS.....	80
DEFINE ALLOCATED ELEMENTS	87

ELEMENT MAINTENANCE	93
DEFINE PERSPECTIVES.....	97
DEFINE VIEWS	105
CREATE USERS	118
UPLOAD LOGO.....	124
UPLOAD DATA.....	129
DEFINE USER SECURITY.....	136



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.



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.



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.



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



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.



- 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.



- 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.



STEPS TO IMPLEMENT EXISONE

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

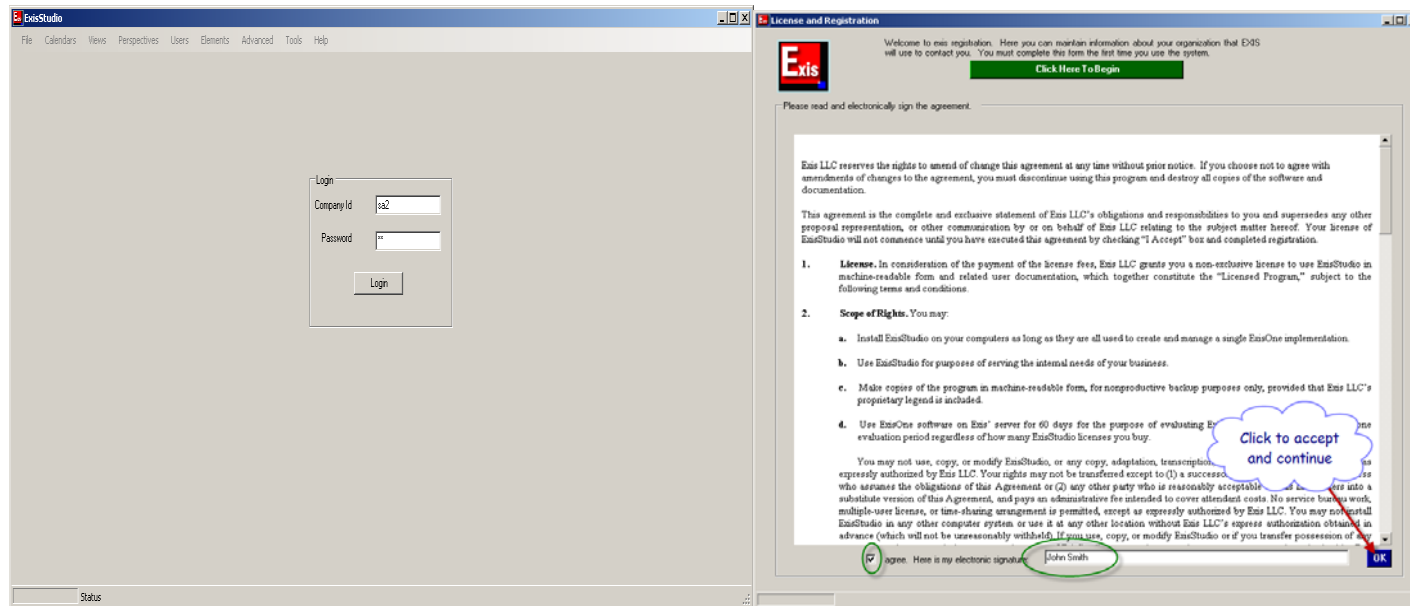
1. Install ExisStudio
2. Start ExisStudio
3. ExisStudio Tutorial
4. Define fiscal calendar
5. Define categories
6. Define calculated elements
7. Define related elements
8. Define virtual elements
9. Define allocated elements
10. Element Maintenance
11. Define perspectives
12. Define views
13. Create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



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.

Exis LLC
77 Old Brookside Road
Randolph, NJ 07869
Tel: (973) 933-2423
Email: info@exisone.com



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.

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77 Old Brookside Road
Randolph, NJ 07869
Tel: (973) 933-2423
Email: info@exisone.com



Registration

Welcome to exis registration. Here you can maintain information about your organization that Exis will use to contact you. You must complete this form the first time you use the system.

[Click Here To Begin](#)

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[Click Here To Begin](#)

Company Id:	sa2	* Company Id used to sign into Exis Studio.
Password:	*	* Password used to sign into Exis Studio.
Password Verification:	*	* Re-enter password used to sign into Exis Studio.
Company Name:	Sample Inc.	* The name of your organization.
Country:	UNITED STATES	* Select your country.
Address1:	1234 Main Street	* Address line 1 of your organization.
Address2:		* Address line 2 of your organization.
City:	Any Town	* City.
State:	NEW YORK	* US state
Postal Code:	01234	* Postal Code (zip).
First Name:	Richard	* Primary contact First Name
Last Name:	Thompson	* Primary contact Last Name
Phone 1:	564654654	* Primary contact phone 1
Phone 2:	(123) 456-7890	Primary contact phone 2
Fax:		Primary contact fax
Email:	richardt@sampleinc.com	* Primary contact email
Verify Email:	richardt@sampleinc.com	* Please retype (verify) primary contact email
First Name:		Alternate contact First Name
Last Name:		Alternate contact Last Name
Email:		Alternate contact email
Verify Email:		Please retype (verify) alternate contact email
Phone 1:		Alternate contact phone 1
Phone 2:		Alternate contact phone 2

[Update Registration.](#)

[Update Registration.](#)

8. After installation, ExisStudio will be launched.

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Email: info@exisone.com



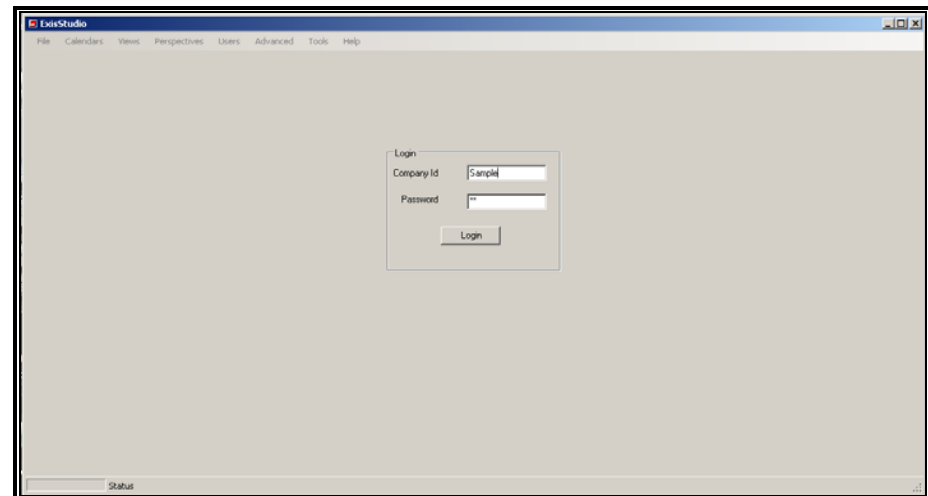
START EXISSTUDIO

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.





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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Randolph, NJ 07869
Tel: (973) 933-2423
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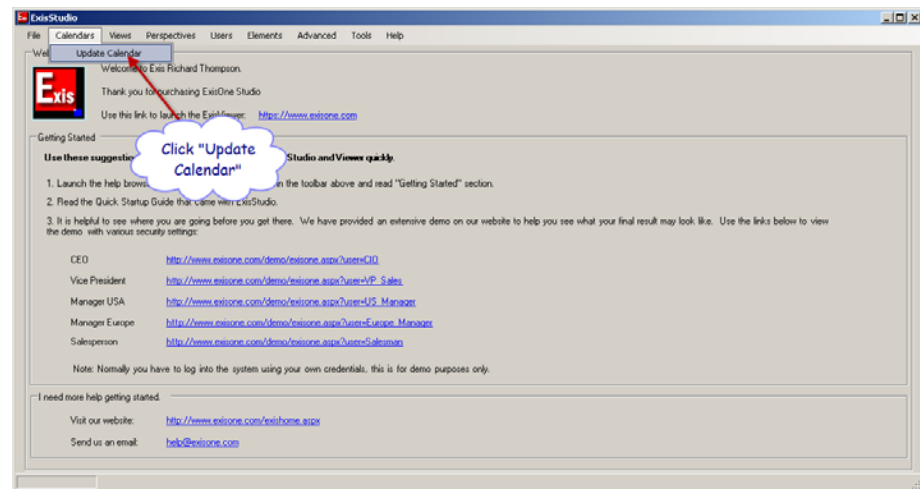


DEFINE FISCAL CALENDAR

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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 77 Old Brookside Road
 Randolph, NJ 07869
 Tel: (973) 933-2423
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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.

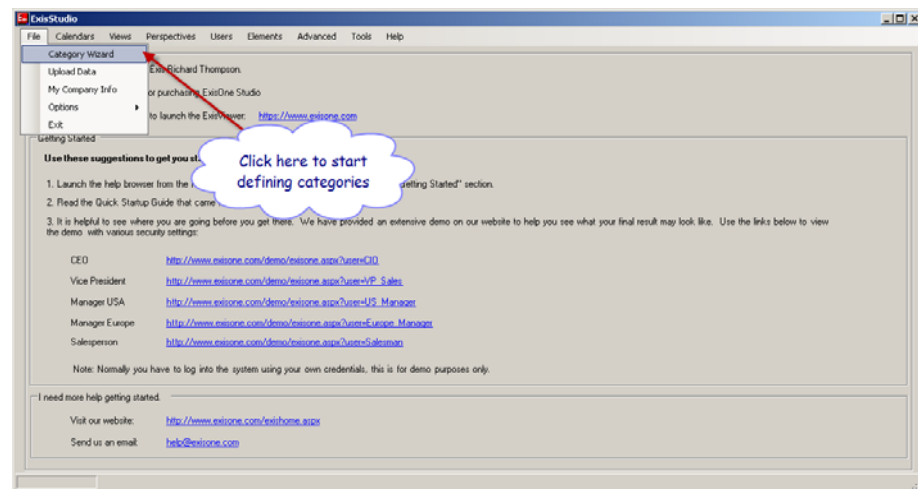
Fiscal Period	Fiscal Year	Period Name	Start Of Period	End Of Period	Closed Period	User Created	Date Created	User Modified	Date Modified
1	2009	January	1/1/2009	1/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
2	2009	February	2/1/2009	2/28/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
3	2009	March	3/1/2009	3/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
4	2009	April	4/1/2009	4/30/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
5	2009	May	5/1/2009	5/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
6	2009	June	6/1/2009	6/30/2009	<input type="checkbox"/>	sa	1/4/2009	sa	3/3/2009
7	2009	July	7/1/2009	7/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009
8	2009	August	8/1/2009	8/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009
9	2009	September	9/1/2009	9/30/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009
10	2009	October	10/1/2009	10/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009
11	2009	November	11/1/2009	11/30/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009
12	2009	December	12/1/2009	12/31/2009	<input type="checkbox"/>	sa	1/4/2009	sa	1/4/2009



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.

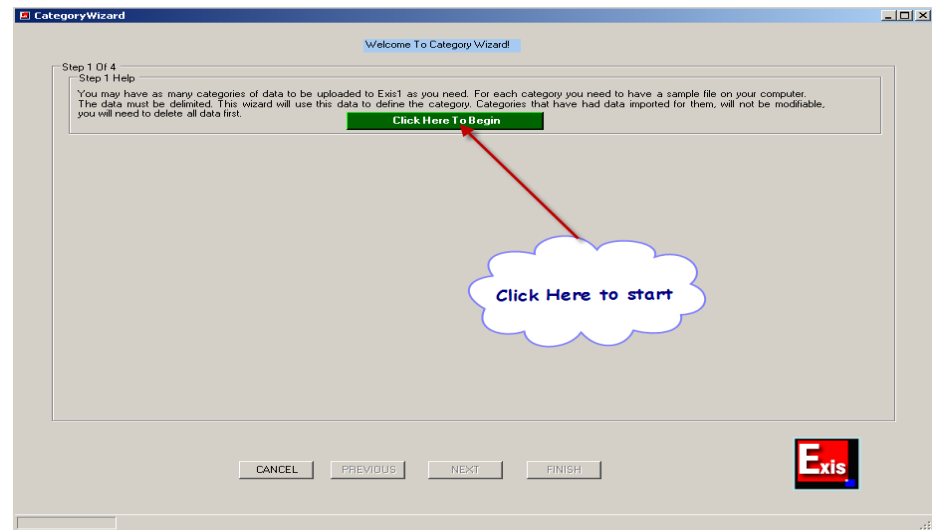


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Randolph, NJ 07869
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ExisStudio runs on your PC using data stored on ExisServer.

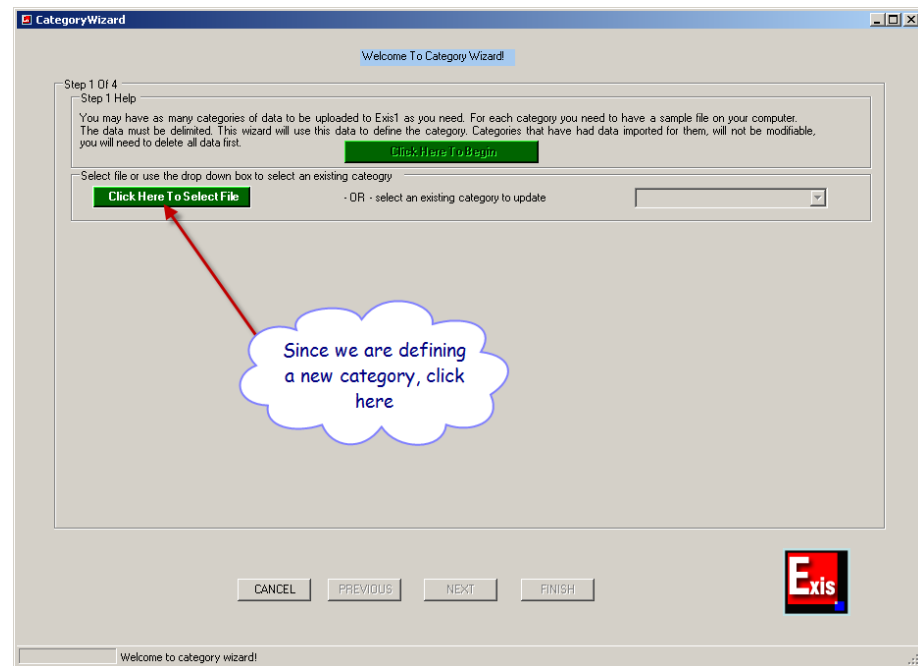
Now click on the green button to start. You will note that all wizards in ExisStudio require you to click on a green button to start the wizard. This initiates the process of collecting data from ExisServer; allowing ExisStudio to manipulate it locally on your computer.





DEFINE LOOKUP TABLES

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



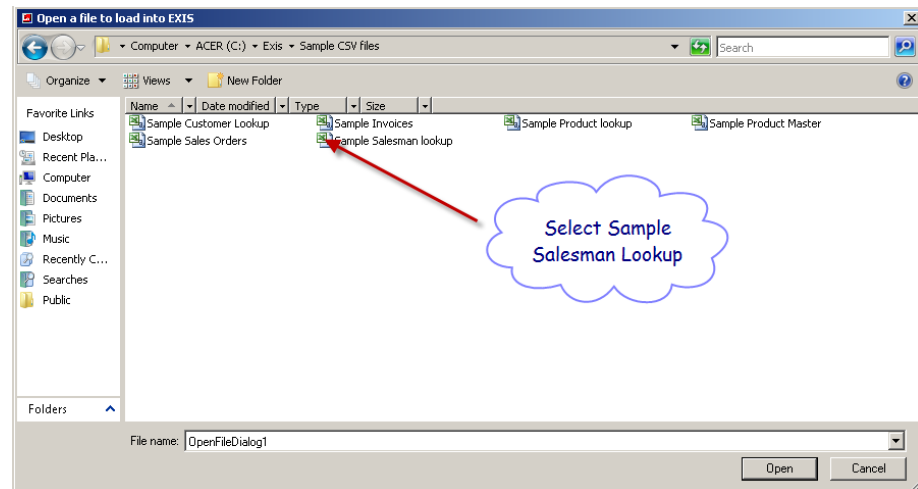
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If you do not see the sample files, navigate to the directory where the sample files are stored.

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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77 Old Brookside Road
Randolph, NJ 07869
Tel: (973) 933-2423
Email: info@exisone.com



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 if the column titles are the same as the name of the element of data in the column.

Welcome To Category Wizard!

Step 1 Of 4
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

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 fields of data in file, typically comma: .

Text qualifier used to indicate text containing delimiter("'\", typically double quote

Preview your file

Salesman ID	Salesman Name	Territory ID	Territory Mgr.	Area Mgr.	Sales VP
10	Gerald, John J.	1	Tandon, William	Vitolo, Manny	Tintea, Richard
11	Harrison, Michael	1	Tandon, William	Vitolo, Manny	Tintea, Richard
12	Morrison, Arnold	2	Morrison, Arnold	Vitolo, Manny	Tintea, Richard
13	D'Antoni, Leslie Ann	3	D'Antoni, Leslie Ann	Vitolo, Manny	Tintea, Richard
14	Gaynor, Marshall	4	Gaynor, Marshall	Vitolo, Manny	Tintea, Richard
15	Manx, Richard T. Jr.	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard
16	Bowe, Thomas M.	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard
17	Sullivan, Peg	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard
18	Stillman, Howard H	6	Stillman, Howard H	Wassel, Igor	Tintea, Richard

CANCEL PREVIOUS NEXT FINISH

Click "NEXT" to continue

Exis



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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Tel: (973) 933-2423
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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.

CategoryWizard

Lookup category: Salesman Lookup

Step 3 Of 4

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

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

Element Type

☐ Alphanumeric ☒ Transaction Date ☐ Unique Identifier
☐ Numeric (units, \$\$\$ only) ☐ Date
☒ Fiscal Year
☐ Fiscal Period

Element Property

☐ Year To Date
☐ Quarter To Date

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.

Salesman ID	Salesman Name	Territory ID	Territory Mgr.	Area Mgr.	Sales VP	CEO
10	Gerald, John J.	1	Tandon, William	Vitolo, Manny	Tintea, Richard	Dubover, I
11	Harrison, Michael	1	Tandon, William	Vitolo, Manny	Tintea, Richard	Dubover, I
12	Morrison, Arnold	2	Morrison, Arnold	Vitolo, Manny	Tintea, Richard	Dubover, I
13	D'Antoni, Leslie Ann	3	D'Antoni, Leslie Ann	Vitolo, Manny	Tintea, Richard	Dubover, I
14	Gaynor, Marshall	4	Gaynor, Marshall	Vitolo, Manny	Tintea, Richard	Dubover, I
15	Marx, Richard T. Jr.	5	De Rosa, Ellen	Wassef, Igor	Tintea, Richard	Dubover, I
16	Bowe, Thomas M.	5	De Rosa, Ellen	Wassef, Igor	Tintea, Richard	Dubover, I
17	Sullivan, Pen	5	De Rosa, Ellen	Wassef, Igor	Tintea, Richard	Dubover, I

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

Message Line

CANCEL PREVIOUS NEXT FINISH



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”.

The screenshot shows the 'CategoryWizard' window at 'Step 3 of 4'. It is configuring a new element named 'Salesman ID'. The 'Element Type' is set to 'Alphanumeric'. The 'Element Property' section has 'Unique Identifier' checked. The 'Record layout' table at the bottom shows the column being defined.

Annotations:

- Second, mark "Create New" button
- Third, select "Alphanumeric"
- Fourth, tag it as a "Unique Identifier"
- First, select
- Fifth, give the element a name.

	Salesman ID	Salesman Name	Territory ID	Territory Mgr.	Area Mgr.	Sales VP	CEO
10		Gerald, John J.	1	Tandon, William	Vitolo, Manny	Tintea, Richard	Dubover, I
11		Harrison, Michael	1	Tandon, William			Dubover, I
12		Morrison, Arnold	2	Morrison, Arnold			Dubover, I
13		D'Anton, Leslie Ann	3	D'Anton, Leslie Ann			Dubover, I
14		Gaynor, Marshall	4	Gaynor, Marshall			Dubover, I
15		Marx, Richard T. Jr.	5	De Rosa, Ellen			Dubover, I
16		Thomas M. Pen	5	De Rosa, Ellen			Dubover, I

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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.

Step 3 of 4

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

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

Element Property Help

Update element name and press Create/Update button

Element Name Salesman ID

Create Column

Record layout: Please click on the column title to identify its properties. You must update properties for every column.

Salesman ID	Salesman Name	Territory ID	Territory Mgr.	Area Mgr.	Sales VP	CEO
10	Gerald, John J.	1	T. M. M.	Vitolo, Manny	Tintea, Richard	Dubover, I
11	Harrison, Michael	1	T. M. M.	Vitolo, Manny	Tintea, Richard	Dubover, I
12	Monison, Arnold	2	T. M. M.	Manny	Tintea, Richard	Dubover, I
13	D'Antoni, Leslie Ann	3	T. M. M.	Manny	Tintea, Richard	Dubover, I
14	Gaynor, Marshall	4	T. M. M.	Manny	Tintea, Richard	Dubover, I
15	Mans, Richard T. Jr.	5	T. M. M.	for	Tintea, Richard	Dubover, I
16	Bowe, Thomas M.	5	T. M. M.	for	Tintea, Richard	Dubover, I
17	Sullivan, Pen	5	T. M. M.	for	Tintea, Richard	Dubover, I

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

CANCEL PREVIOUS NEXT FINISH

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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 than 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:

CategoryWizard

Lookup category: Salesman Lookup

Step 3 Of 4

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
[Dropdown]

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: CEO

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

Salesman...	Salesman Name	Territory ID	Territory Mgr.	Area Mgr.	Sales VP	CEO
10	Gerald, John J.	1	Tandon, William	Vitolo, Manny	Tintea, Richard	Dubover, Christopher
11	Harrison, Michael	1	Tandon, William	Vitolo, Manny	Tintea, Richard	Dubover, Christopher
12	Morrison, Arnold	2	Morrison, Arnold	Vitolo, Manny	Tintea, Richard	Dubover, Christopher
13	D'Antoni, Leslie Ann	3	D'Antoni, Leslie Ann	Vitolo, Manny	Tintea, Richard	Dubover, Christopher
14	Gaynor, Marshall	4	Gaynor, Marshall	Vitolo, Manny	Tintea, Richard	Dubover, Christopher
15	Marx, Richard T. Jr.	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard	Dubover, Christopher
16	Bowe, Thomas M.	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard	Dubover, Christopher
17	Sullivan, Pen	5	De Rosa, Ellen	Wassel, Igor	Tintea, Richard	Dubover, Christopher

You have defined 7 out of 7.

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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

CategoryWizard

Lookup category: Salesman Lookup

Step 3 Of 4

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
[Dropdown]

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

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

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

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

Salesman	Salesman Name	Territory ID	Territory Mgr.	Sales VP	CEO
10	Gerald, John J.	1	Tand...	Tintea, Richard	Dubover, Christopher
11	Harrison, Michael	1	Tand...	Tintea, Richard	Dubover, Christopher
12	Morrison, Arnold	2	Mon...	Tintea, Richard	Dubover, Christopher
13	D'Antoni, Leslie Ann	3	D'A...	Tintea, Richard	Dubover, Christopher
14	Gaynor, Marshall	4	Gay...	Tintea, Richard	Dubover, Christopher
15	Marx, Richard J.	5	De Ro...	Tintea, Richard	Dubover, Christopher
16	Bowe, Thomas M.	5	De Ro...	Tintea, Richard	Dubover, Christopher
17	Sullivan, John	5	De Ro...	Tintea, Richard	Dubover, Christopher

You have defined 7 out of 7.

When all columns are defined, click "NEXT" button

CANCEL PREVIOUS NEXT FINISH

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

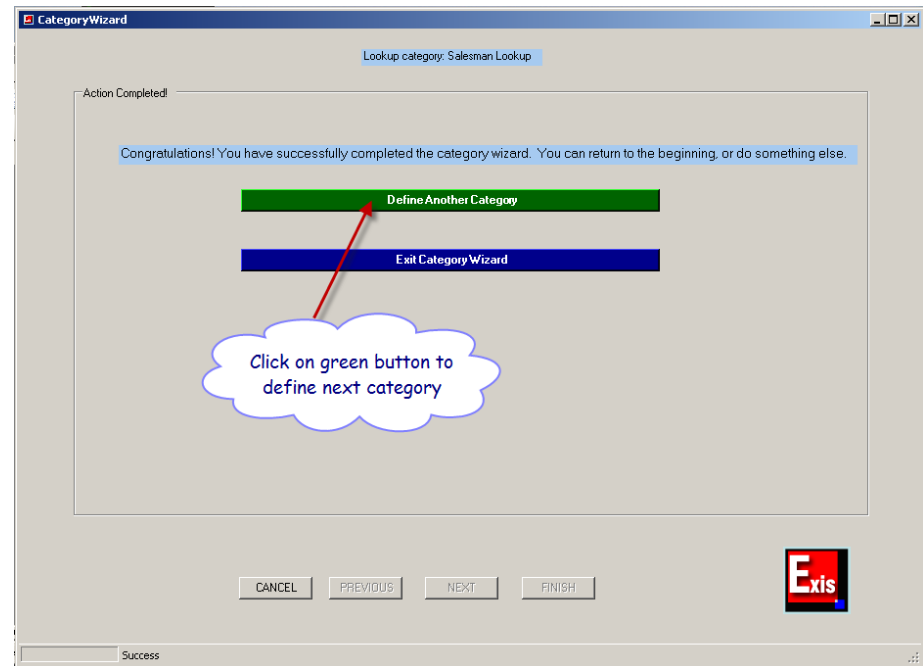
The image shows a screenshot of a software window titled "CategoryWizard". At the top, it says "Lookup category: Salesman Lookup". Below this, it indicates "Step 4 out of 4" and "Instructions". The instructions text reads: "Please order the unique identifiers in a way that makes logical sense. This will be important as it relates to allocation (see advanced options). Drag the column title (by holding the left mouse button) left or right to move it in the right position. Example: Order line, Order # is wrong; but Order #, Order Line is correct. At the end click FINISH, and you are done!". Below the instructions is a section titled "Indexes Defined" which contains a table with two columns: "Salesman ID" and an empty cell. The value "10" is entered in the empty cell. A blue callout bubble with a red arrow points from the text "We will explain this when defining category 'Invoices'. For now, click on 'FINISH'." to the "FINISH" button at the bottom of the dialog. The "FINISH" button is highlighted in blue. Other buttons at the bottom include "CANCEL", "PREVIOUS", and "NEXT". The Exis logo is visible in the bottom right corner of the dialog box.

Salesman ID	
10	

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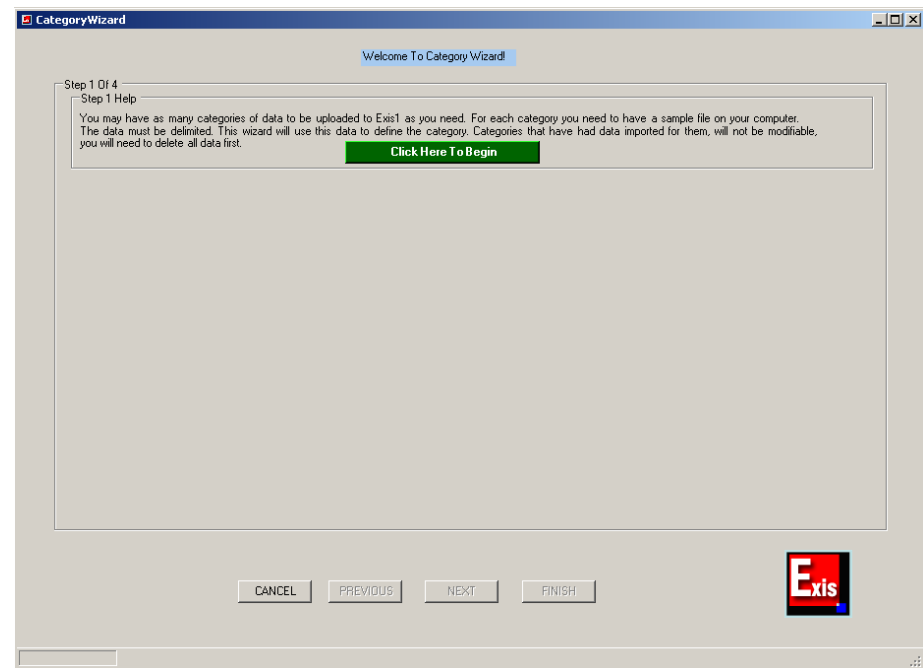
We have defined Salesman lookup category. To continue defining more categories, click on the green “Define Additional Categories” button.



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You should be back at step 1 of 4





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:

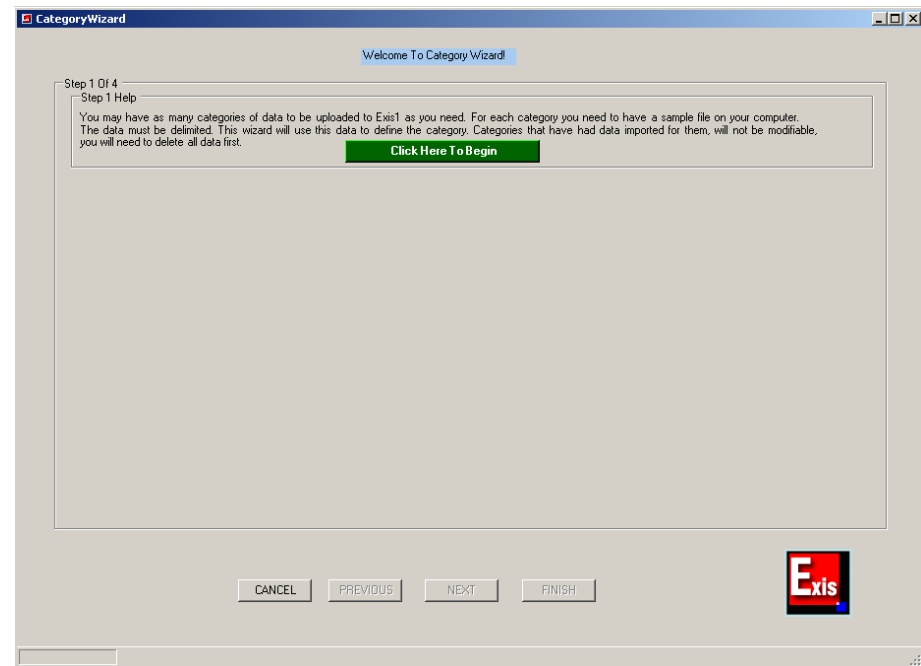
Column	Col. Property	Element Type	Element Property	Element Name
Customer ID	Create New	Alphanumeric	Unique Identifier	Customer ID
Customer Name	Create New	Alphanumeric		Customer Name
Parent Customer	Create New	Alphanumeric		Parent Customer

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.

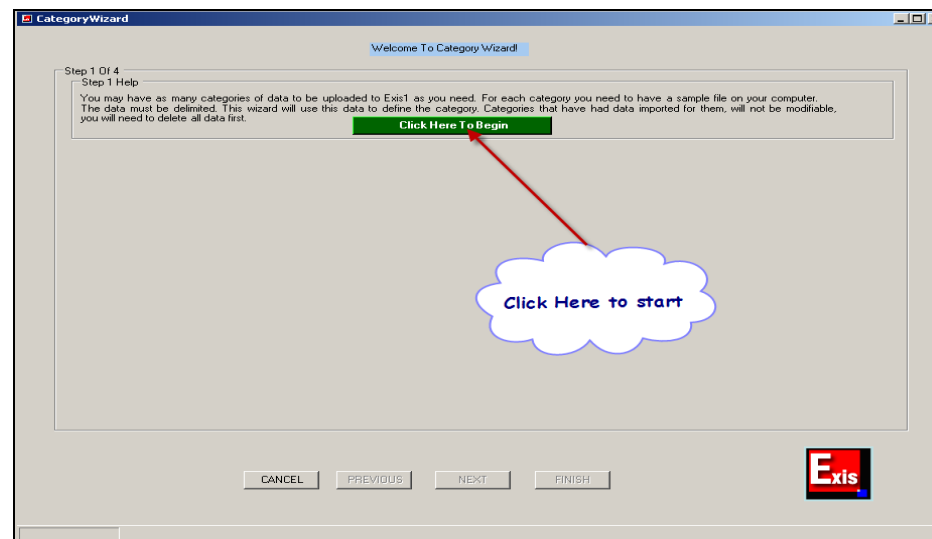


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DEFINE MASTER FILES

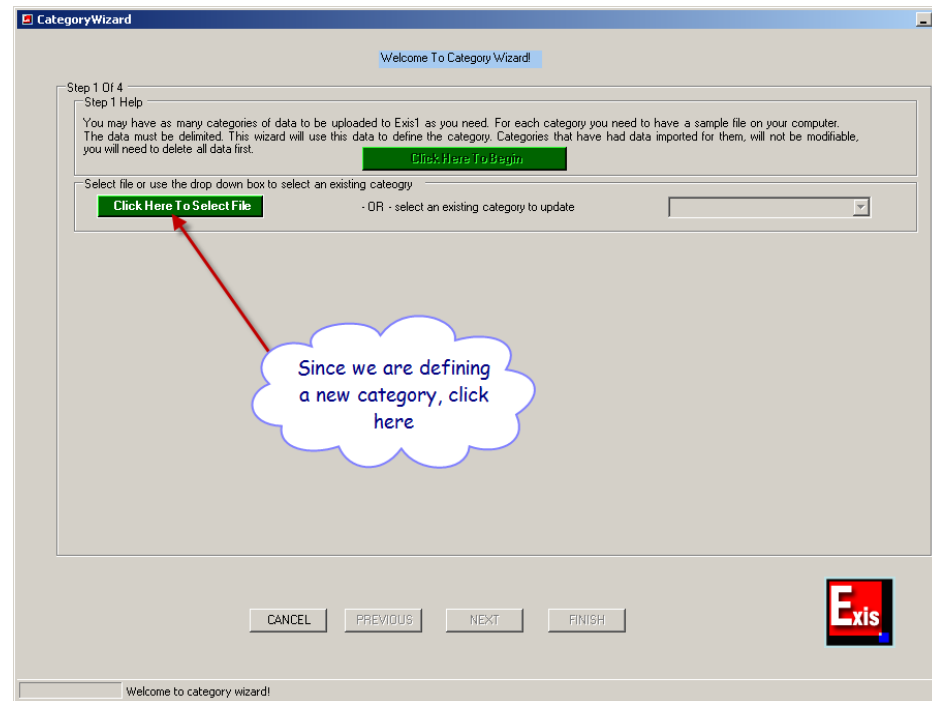
Again click on the green button to start.



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Tel: (973) 933-2423
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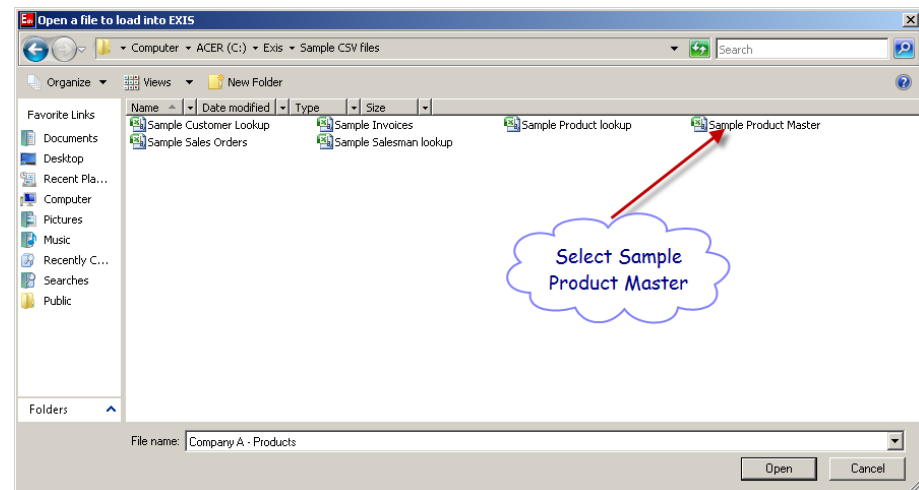
Since, you are defining a new category file,
click on button “Click here to select file”.



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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.

Welcome To Category Wizard!

Step 1 Of 4
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 Select File](#)

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

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

product id	Effective Date	Std. Unit Cost	list price	Unit Weight
100	1/1/2004	1898.0944	3374.99	20.35
101	1/1/2004	1898.0944	3374.99	20.77
102	1/1/2004	1898.0944	3374.99	21.13
103	1/1/2004	1898.0944	3374.99	21.42
104	1/1/2004	1912.1544	3399.99	20.35
105	1/1/2004	1912.1544	3399.99	20.77
106	1/1/2004	1912.1544	3399.99	21.13
107	1/1/2004	1912.1544	3399.99	21.42
108	1/1/2004	1251.9813	2294.99	23.35
109	1/1/2004	1251.9813	2294.99	23.77

CANCEL PREVIOUS NEXT FINISH

Click "NEXT" to continue



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.

The screenshot shows the 'CategoryWizard' dialog box, Step 2 of 4. The title bar says 'CategoryWizard'. The main window has a title 'Master category: Product Master'. Below this, there's a section 'Category Title' with a text box containing 'Product Master'. A red arrow points from a cloud annotation 'Enter "Product Master"' to this text box. Below that is a section 'Select Category Type' with three radio buttons: 'Transactional', 'Lookup', and 'Master File'. The 'Master File' option is selected. A red arrow points from a cloud annotation 'Select Master File' to this option. Below this is a section 'Select behavior as records come in for this category with' with four radio buttons: 'Replace record', 'Delete Whole Category And Replace', 'Do Not Replace - Add', and 'Do Not Replace - Error'. The 'Replace record' option is selected. A red arrow points from a cloud annotation 'Select Replace Record' to this option. Below this is a section 'Select behavior as records come in for this category with' with four radio buttons: 'Replace record', 'Delete Whole Category And Replace', 'Do Not Replace - Add', and 'Do Not Replace - Error'. The 'Replace record' option is selected. A red arrow points from a cloud annotation 'Click "NEXT" to continue' to the 'NEXT' button at the bottom. The 'NEXT' button is highlighted. The dialog box has a 'CANCEL' button, a 'PREVIOUS' button, a 'NEXT' button, and a 'FINISH' button. The Exis logo is in the bottom right corner.



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.

Master category: Product Master

Step 3 Of 4

Instructions

Please click on the column title in the file, then click Create/Update column. This is for every column in your file/category definition. Select appropriate. Next to continue to last step.

Select Existing

Select Product ID from drop down list

Element Type

☒ Unique Identifier

Select Unique Identifier

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

product id	Effective Date	Std. Unit Cost	list price	Unit Weight
100	1/1/2004	1898.0944	3374.99	20.35
101	1/1/2004	1898.0944	3374.99	20.77
102	1/1/2004	1898.0944	3374.99	21.13
103	1/1/2004	1898.0944	3374.99	21.42
		1912.1544	3399.99	20.35
		1912.1544	3399.99	20.77
		1912.1544	3399.99	21.13
		1912.1544	3399.99	21.42
		1251.9813	2294.99	23.35

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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.

Step 3 Of 4

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

Element Type: Alphanumeric Effective 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: Product Master Effective Date

Create/Update Column product id

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

Product ID	Effective Date	Std. Unit Cost	list price	Unit Weight
100	1/1/2004	1898.0944	3374.99	20.35
101	1/1/2004	1898.0944	3374.99	20.77
102	1/1/2004	1898.0944	3374.99	24.13
103	1/1/2004	1898.0944		
104	1/1/2004	1912.1544		
105	1/1/2004	1912.1544		
106	1/1/2004	1912.1544		
107	1/1/2004	1912.1544		
108	1/1/2004	1251.9813	2294.99	23.35

You have defined 1 out of 5. Please define all columns.

CANCEL PREVIOUS NEXT FINISH



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.

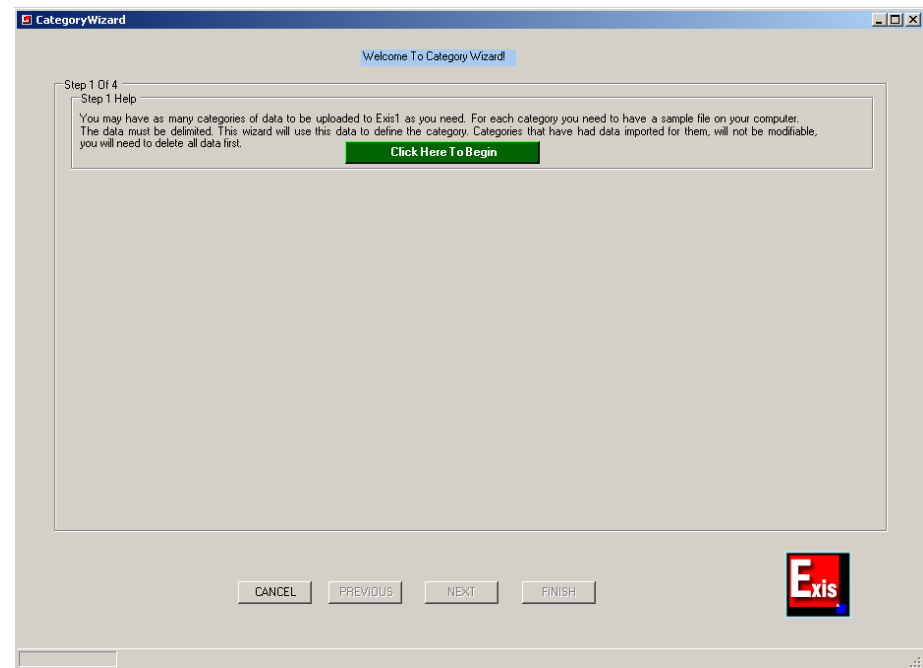
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Now that all lookup table and master file categories are defined, you are ready to define transaction categories.

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.



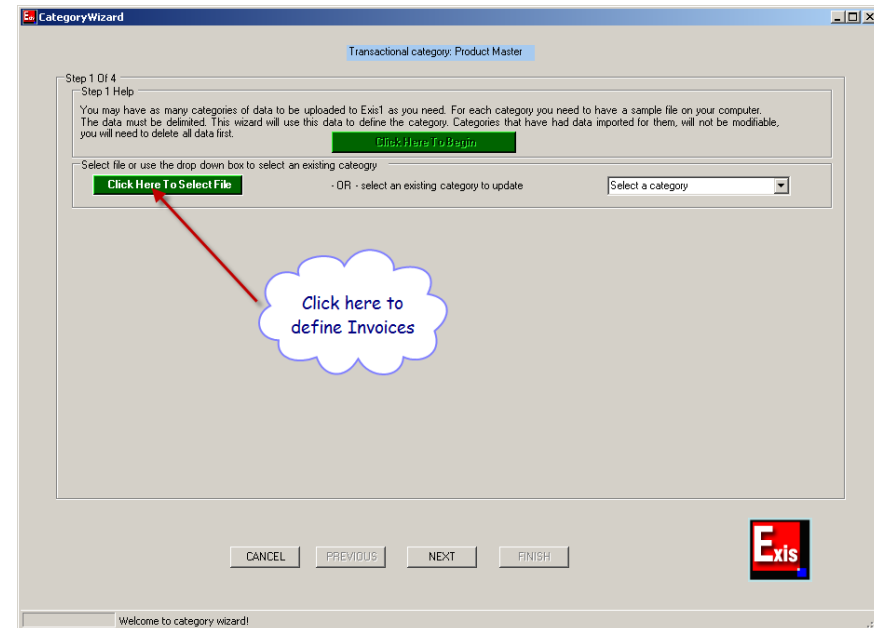


DEFINE TRANSACTIONAL DATA

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.

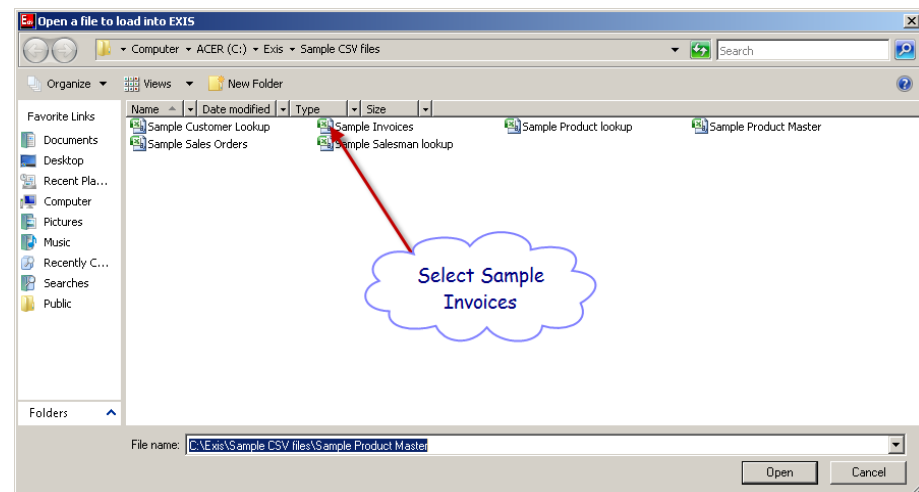
For this test data, you will next define Invoices category.



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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.

CategoryWizard

Welcome To Category Wizard

Step 1 Of 4
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 Select File](#)

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:

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	Order Date	Due Date	Ship Date	Customer	Sales PersonId	Quantity	Product Id	Un
10001	1	1/2/2004	1/12/2004	1/16/2004	107	10	3	119	76
10001	2	1/2/2004	1/12/2004	1/14/2004	107	10	2	183	11
10001	3	1/2/2004	1/12/2004	1/14/2004	107	10	1	174	52
10002	1	1/3/2004	1/10/2004	1/10/2004	107	10	2	196	67
10003	1	1/3/2004	1/13/2004	1/13/2004	107	10	13	110	21
10004	1	1/3/2004	1/12/2004	1/12/2004	107	10	15	141	24
10005	1	1/3/2004	1/11/2004	1/11/2004	107	10	2	196	63
10005	2	1/3/2004	1/11/2004	1/12/2004	107	10	5	173	53
10005	3	1/3/2004	1/11/2004	1/15/2004	107	10	4	133	35

Click "NEXT" to continue

CANCEL PREVIOUS NEXT FINISH

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

The screenshot shows the 'CategoryWizard' dialog box, Step 2 of 4. The title bar says 'CategoryWizard'. The main window has a tab labeled 'Transactional category: Invoices'. The 'Category Title' section has a text box containing 'Invoices'. The 'Select Category Type' section has three radio buttons: 'Transactional' (selected), 'Lookup', and 'Master File'. The 'Select behavior' section has three radio buttons: 'Replace record' (selected), 'Delete Whole Category And Replace', and 'Do Not Replace - Add'. At the bottom are buttons for 'CANCEL', 'PREVIOUS', 'NEXT', and 'FINISH'. Three blue callout boxes with red arrows point to the 'Invoices' text box, the 'Transactional' radio button, and the 'Replace record' radio button. The callouts contain the text: 'Enter "Invoices" as naome of the category', 'Select "Transactional" as category type', and 'Select "Replace record" behavior' respectively. The Exis logo is in the bottom right corner of the dialog box.

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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.

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 the layout. After every column is defined, click Next to continue to the next step.

Second, check "Create New"

Third, check "Alphanumeric"

Fourth, check "Unique Identifier"

First, select "Invoice" Column.

Last, click "Create Column"

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

Invoice	Invoice Line	Order Date	Due Date	Ship Date	Customer	Sales PersonId	Quantity	Unit Price
10001	1	1/2/2004	1/12/2004	1/16/2004	107	10		
10001	2	1/2/2004	1/12/2004	1/14/2004	107	10		
10001	3	1/2/2004	1/12/2004	1/13/2004	107	10		
10002		1/3/2004	1/10/2004	1/10/2004	108	13		
10003		1/13/2004	1/19/2004	1/19/2004	112	11		
10004		1/12/2004	1/16/2004	1/16/2004	109	14		
10005		1/11/2004	1/12/2004	1/12/2004	103	15	2	690.38
10006		1/11/2004	1/12/2004	1/12/2004	103	15	5	173

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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”.

The screenshot shows the 'CategoryWizard' window, Step 3 of 4. The 'Transactional category: Invoices' is selected. The 'Element Type' is set to 'Alphanumeric'. The 'Element Property' section has 'Unique Identifier' checked. The 'Record layout' table is visible, with the 'Invoice Line' column highlighted. The 'Create Column' button is blue. Annotations include: 'Check "Create New"' pointing to the 'Create New' radio button; 'Check "Alphanumeric"' pointing to the 'Alphanumeric' radio button; 'Check "Unique Identifier"' pointing to the 'Unique Identifier' checkbox; 'Select column "Invoice Line"' pointing to the 'Invoice Line' column in the record layout; and 'Last, click "Create Column"' pointing to the 'Create Column' button.

Invoice	Invoice Line	Order Date	Due Date	Ship Date	Customer	Sales PersonId	Quantity	Product Id	Unit Price
10001	1	1/2/2004	1/12/2004	1/16/2004	107	10	3		
10001	2	1/2/2004	1/12/2004	1/14/2004	107	10	2		
10001	3	1/2/2004	1/12/2004	1/13/2004	107	10	1		
10002	1	1/3/2004	1/10/2004	1/12/2004	108	13	2		
10003	1	1/3/2004	1/10/2004	1/18/2004	112	11	13		
10004	1	1/3/2004	1/10/2004	1/16/2004	109	14	15		
10005	1	1/3/2004	1/10/2004	1/12/2004	103	15	2	136	
10006	2	1/3/2004	1/10/2004	1/12/2004	103	15	5	173	833.49

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77 Old Brookside Road
Randolph, NJ 07869
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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.

CategoryWizard

Transactional category: Invoices

Step 3 Of 4

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.

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
Element Property Help

Update element name and press Create/Update button
Element Name Order Date

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

Invoice	Invoice Line	Order Date	Due Date	Ship Date	Customer	Sales Person Id	Quantity	Product Id	Unit Price
10001	1	1/2/2004	1/12/2004	1/16/2004	107	10	3		
10001	2	1/2/2004	1/12/2004	1/14/2004	107	10	2		
10001	3	1/2/2004	1/12/2004	1/16/2004		10	1		
10002	1	1/3/2004	1/10/2004			13	2		
10003	1	1/3/2004	1/13/2004			11	13		
10004	1	1/3/2004	1/12/2004			14	15		
10005	1	1/3/2004	1/11/2004			15	2	196	539.99
10005	2	1/3/2004	1/11/2004			15	5	173	539.99

You have defined 2 out of 13. Please define all columns.

CANCEL PREVIOUS NEXT FINISH

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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.



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.

CategoryWizard

Transactional category: Invoices

Step 4 out of 4

Instructions

Please order the unique identifiers in a way that makes logical sense. This will be important as it relates to allocation (see Allocated Elements under Advanced Tab in Exis Studio menu bar). Drag the column title (by holding the left mouse button) left or right to move it in the right position. Example: Order line, Order # is wrong, but Order #, Order Line is correct. At the end click FINISH, and you are done!

Indexes Defined

Invoice	Invoice Line
10001	1

Click "FINISH" button to continue

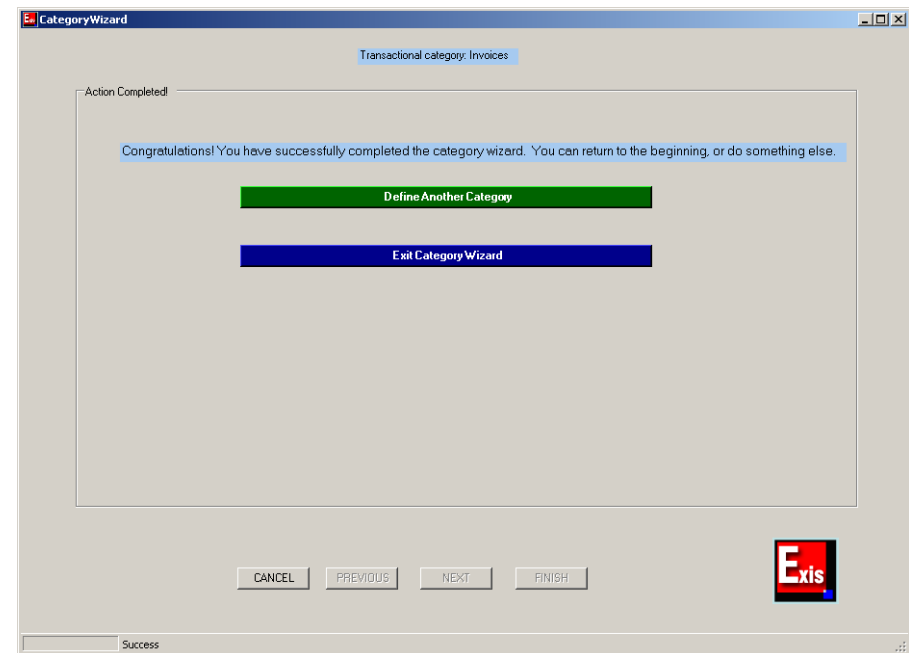
CANCEL PREVIOUS NEXT FINISH

The Exis logo is located in the bottom right corner of the dialog box.

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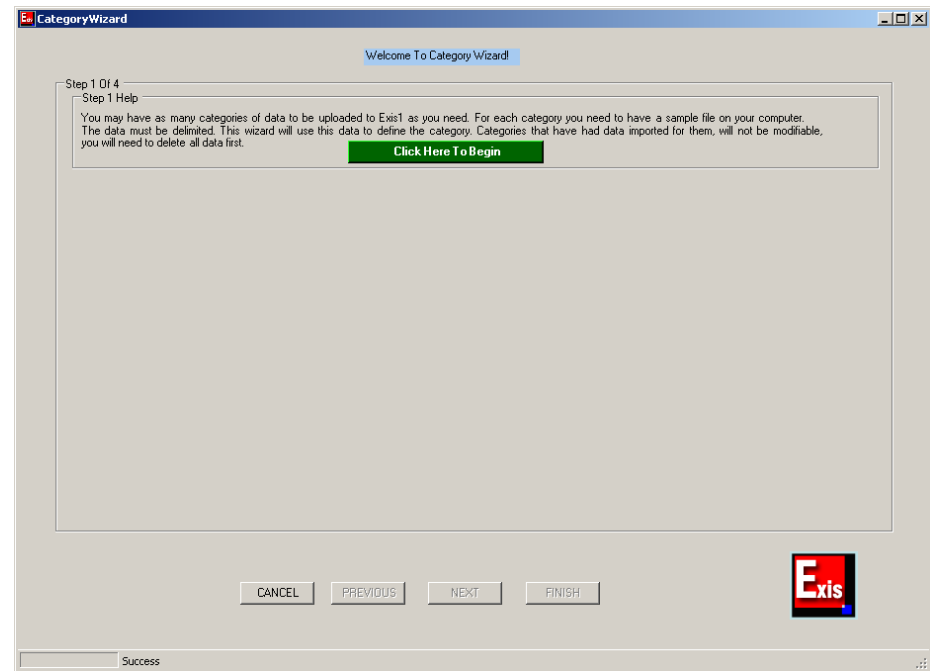
Click on the green button to define the last category.



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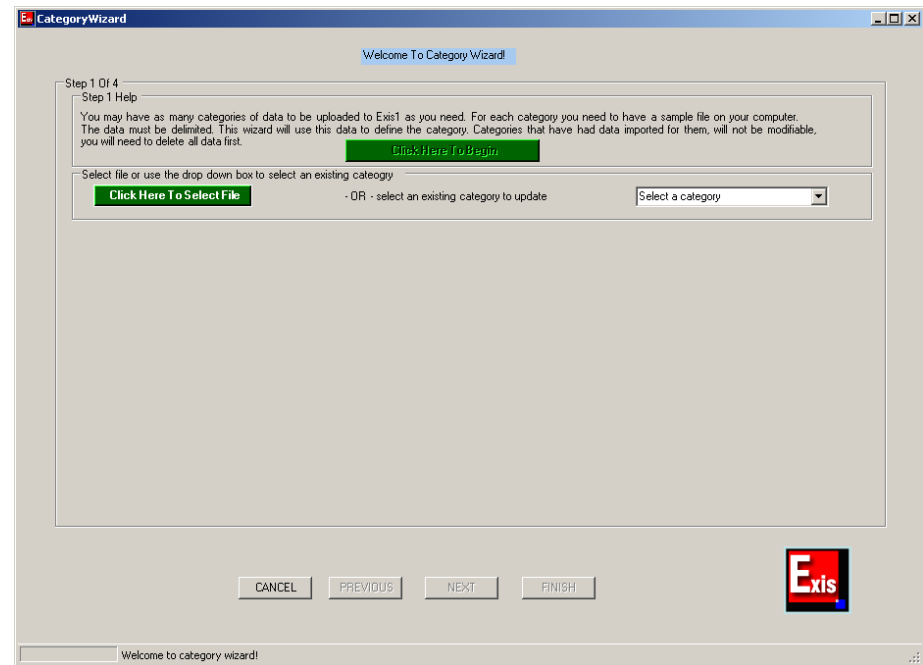
Click the green button.



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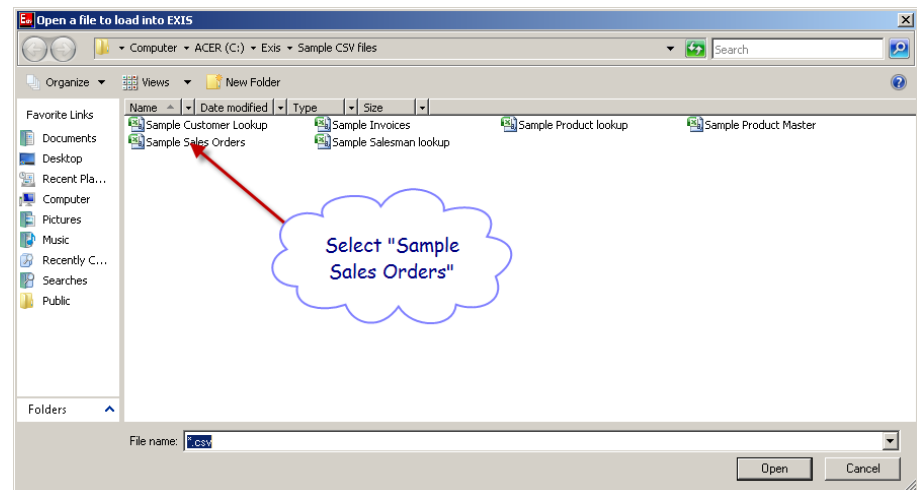
Click “Click here to Select File” button.



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Select "Sample Sales Orders".



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Click "NEXT" button to continue.

CategoryWizard

Welcome To Category Wizard

Step 1 Of 4
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:

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

Order #	Order Line	Order Date	Due Date	Customer	Salesman ID	OrderQty	Product Id	Order Price	Order \$
16281	1	3/5/2009	3/16/2009	107	11	2	196	682.96	1365.92
16284	1	3/7/2009	3/17/2009	102	17	14	138	2418.91	33864.7
16288	1	3/8/2009	3/18/2009	112	11	14	192	697.8	9769.2
16288	2	3/8/2009	3/18/2009	112	11	5	167	759.5	3797.5
16288	4	3/8/2009	3/18/2009	112	11	3	168	822.13	2466.39
16289	4	3/8/2009	3/18/2009	112	11	2	126	512.99	1025.98
16292	1	3/9/2009	3/19/2009	112	11	1	155	1109.28	4437.12
16292	5	3/9/2009	3/19/2009	112	11	1	146	1717.99	1717.99
16293	6	3/9/2009	3/19/2009	112	11	5	180	2312.54	11562.7

[Click "NEXT"](#)

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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.

The screenshot shows the "CategoryWizard" dialog box, Step 2 of 4. The title bar says "CategoryWizard". The main title is "Transactional category: Sales Orders". The "Category Title" field contains "Sales Orders". The "Select Category Type" section has three radio buttons: "Transactional" (selected), "Lookup", and "Master File". The "Select behavior" section has three radio buttons: "Delete Whole Category And Replace" (selected), "Replace record", and "Do Not Replace - Add". The "Do Not Replace - Error" option is also present. The "NEXT" button is highlighted with a red arrow and a callout bubble that says "Click 'NEXT' to continue". Other callout bubbles point to the "Category Title" field ("Enter 'Sales Orders'"), the "Transactional" radio button ("Select 'Transactional'"), and the "Delete Whole Category And Replace" radio button ("Select 'Delete Whole Category and Replace'"). The Exis logo is in the bottom right corner.



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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Tel: (973) 933-2423
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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.

Step 4 out of 4

Transactional category: Sales Orders

Instructions

Please order the unique identifiers defined in a way that makes logical sense. This will be important as it relates to allocation (see Allocated Elements under Advanced Tab in Exis Studio menu bar). Drag the column title (by holding the left mouse button) left or right to move it in the right position. Example: Order line, Order # is wrong, but Order #, Order Line is correct. At the end click FINISH, and you are

Indexes Defined

Order #	Order Line
16281	1

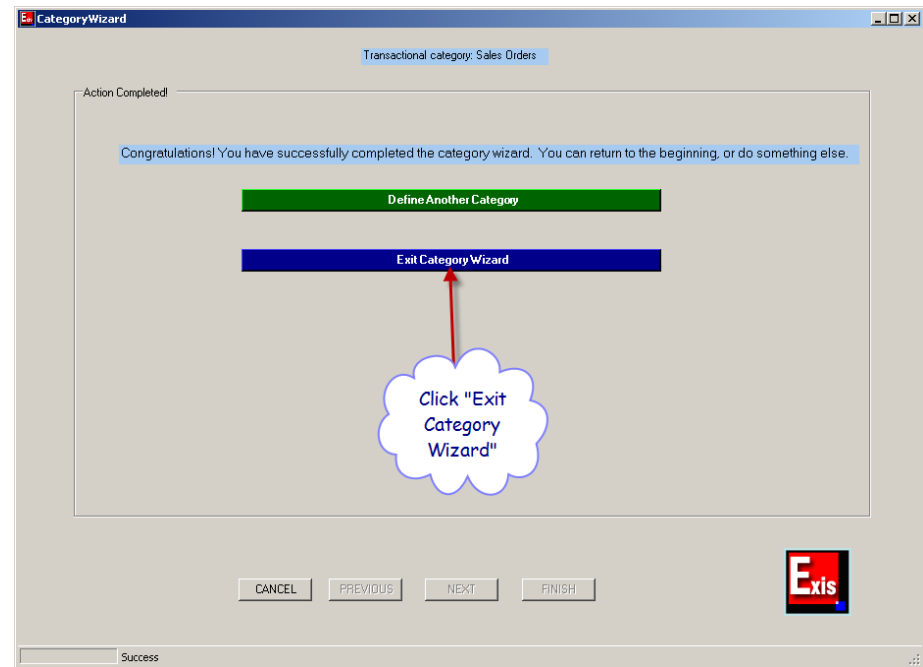
Click "FINISH"

CANCEL PREVIOUS NEXT FINISH

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

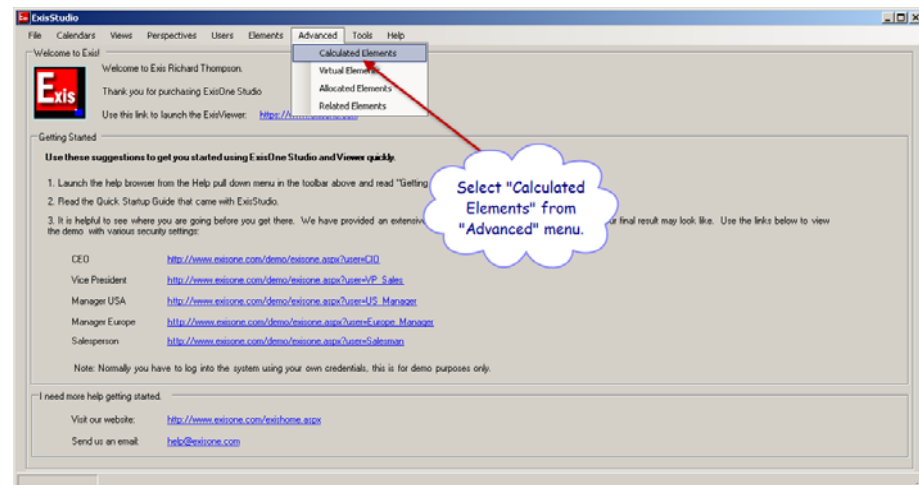




CALCULATED ELEMENTS

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.

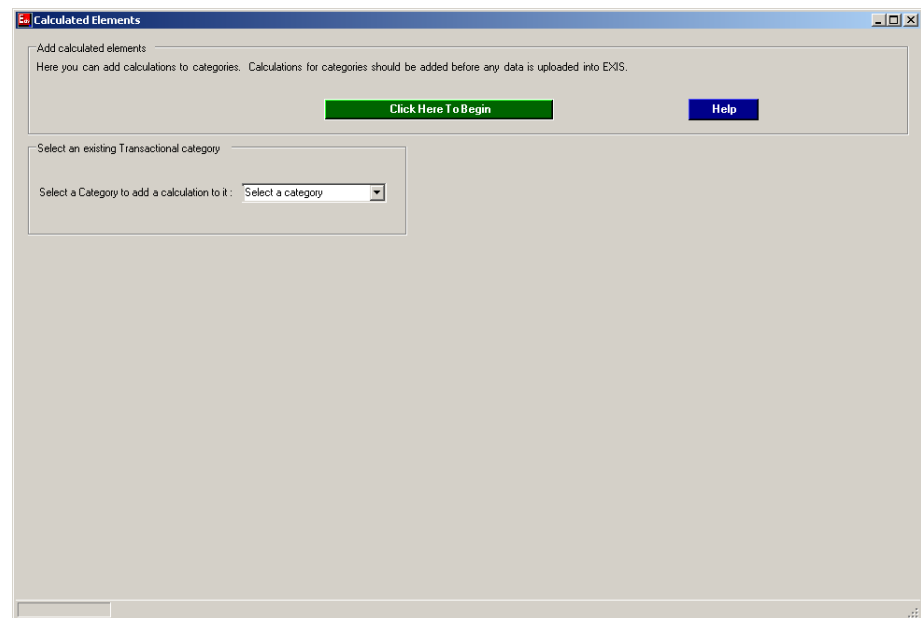
Start ExisStudio. Select “Calculated Elements” from “Advanced” menu.



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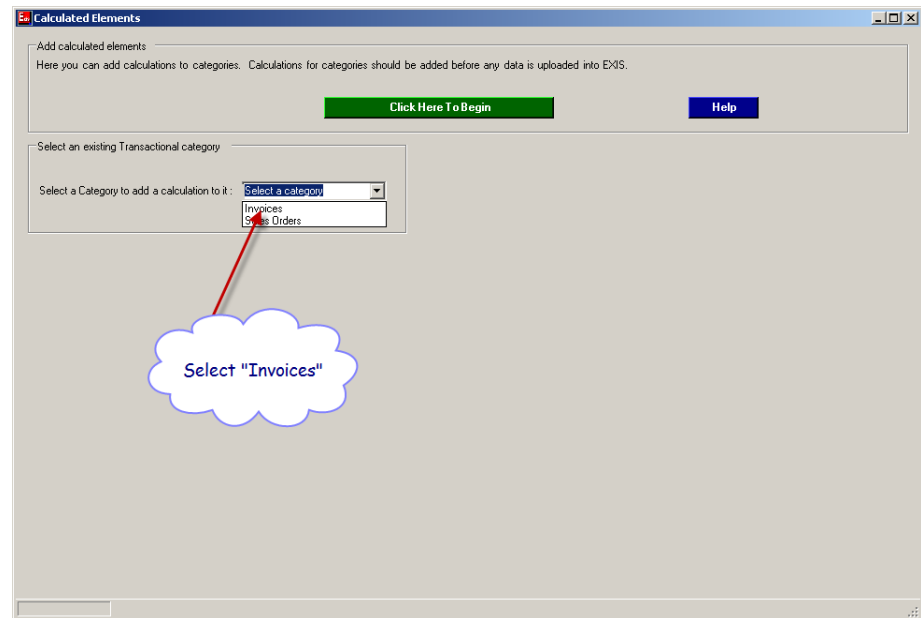
After you click on green button “Click Here to Begin”, you should see this screen.



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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.

The screenshot shows a software window titled "Calculated Elements". At the top, there is a green button labeled "Click Here To Begin" and a blue button labeled "Help". Below these, the window is divided into two main sections. The left section is titled "Select an existing Transactional category" and contains a dropdown menu labeled "Select a Category to add a calculation to it:" with "Invoices" selected. The right section is titled "Select" and contains a blue button labeled "Create New Element". Below this button are two options: "OR modify/delete an existing calculated element:" with a dropdown menu showing "None Available", and "OR add a calculated element from another category:" with a dropdown menu showing "one available". A red arrow points from a white cloud-shaped callout containing the text "Click 'Create New Element'" to the "Create New Element" button.



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.

The screenshot shows a software window titled "Calculated Elements". It has a menu bar with "Create New" and "Delete". The main area is divided into several sections. At the top, there's a "Click Here To Begin" button and a "Help" button. Below that, there's a "Select an existing Transactional category" section with a dropdown menu showing "Invoices". To the right, there's a "Select" section with a "Create New Element" button and two dropdown menus: "OR modify/delete an existing calculated element:" (showing "None Available") and "OR add a calculated element from another category:" (showing "one Available"). The central part is the "Calculated Element Constructor" which contains two groups. Group 1 is circled in green and contains buttons for "-", "(", "Select an element" (a dropdown), and "Constant:" followed by a text input field. Group 2 is also circled in green and contains buttons for "+", "-", "*", "/", and ")". At the bottom, there's an "Expression Window" section with a label "Expression:" and a text input field. Below this are three buttons: "Cancel" (yellow), "Delete Last" (red), and "Continue" (blue).

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You are going to build an expression to compute the contribution margin. Expression is $(\text{Unit Price} - \text{Std. Unit Cost}) * \text{Qty Sold}$. Select "(" from group 1.

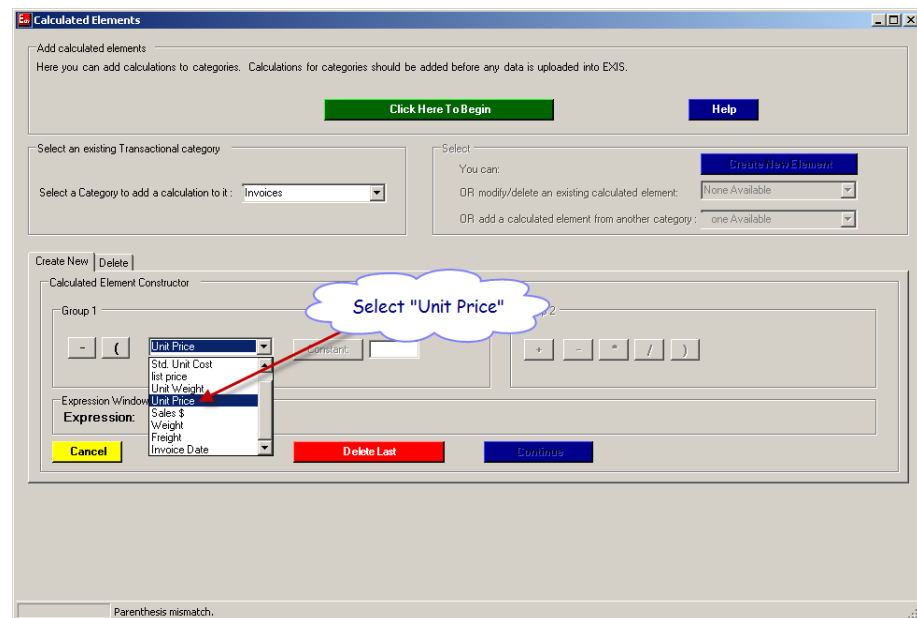
The screenshot shows the 'Calculated Elements' dialog box. At the top, there's a title bar and a 'Help' button. Below, a green 'Click Here To Begin' button is prominent. The main area is divided into sections. 'Select an existing Transactional category' has a dropdown menu showing 'Invoices'. To the right, a 'Select' section offers options to 'Create New Element', 'Modify/delete an existing calculated element', or 'Add a calculated element from another category'. The 'Calculated Element Constructor' section contains two groups of operators. Group 1 includes a minus sign, an open parenthesis '(', and a 'Select an element' dropdown. A red arrow points from a cloud-shaped callout containing the text 'Select "("' to the open parenthesis button in Group 1. Group 2 contains plus, minus, multiply, divide, and close parenthesis buttons. Below the constructor, an 'Expression Window' shows the current expression as '('. At the bottom, there are 'Cancel', 'Delete Last', and 'Continue' buttons. A status bar at the very bottom indicates a 'Parenthesis mismatch'.

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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.

A screenshot of the 'Calculated Elements' dialog box. The window has a title bar 'Calculated Elements' and standard window controls. Inside, there's a section 'Add calculated elements' with a green 'Click Here To Begin' button and a blue 'Help' button. Below this, 'Select an existing Transactional category' has a dropdown menu showing 'Invoices'. To the right, a 'Select' section has a blue 'Create New Element' button and two dropdowns for 'OR modify/delete an existing calculated element' (set to 'None Available') and 'OR add a calculated element from another category' (set to 'one Available'). The main area is 'Calculated Element Constructor' with 'Create New' and 'Delete' buttons. It contains 'Group 1' with buttons '-', '(', 'Unit Price', and 'Constant:'. 'Group 2' contains buttons '+', '-', '*', '/', and ')'. A blue cloud annotation points to the '-' button in Group 2 with the text 'Select minus"-"'. Below the groups is an 'Expression Window' showing 'Expression: { {Unit Price} }'. A green arrow points to this expression with the text 'Expression as it is built'. At the bottom are 'Cancel', 'Delete Last', and 'Continue' buttons. A status bar at the very bottom says 'Parenthesis mismatch.'



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 data warehouse fetches it from “Product Master” and adds it to the elements in the “Invoices”.

Expression is now completed. Click “Continue” button.

The screenshot shows the 'Calculated Elements' window. At the top, there's a 'Click Here To Begin' button and a 'Help' button. Below, there's a section 'Select an existing Transactional category' with a dropdown menu set to 'Invoices'. To the right, there's a 'Select' section with a 'Create New Element' button and two dropdown menus for modifying or adding elements. The main area is the 'Calculated Element Constructor' with 'Group 1' and 'Group 2'. Group 1 contains a dropdown set to 'Qty Sold' and a 'Constant' field. Group 2 contains a dropdown set to 'Std. Unit Cost' and a 'Constant' field. Below these groups is an 'Expression/Window' section showing the expression: $(\{ \text{Unit Price} \} - \{ \text{Std. Unit Cost} \}) * \{ \text{Qty Sold} \}$. At the bottom, there are three buttons: 'Cancel', 'Delete Last', and 'Continue'. A blue callout bubble with the text 'Click "Continue"' points to the '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.

The screenshot shows the 'Calculated Elements' window. At the top, it says 'Add calculated elements' and 'Here you can add calculations to categories. Calculations for categories should be added before any data is uploaded into EXIS.' There are two buttons: 'Click Here To Begin' (green) and 'Help' (blue). Below this, there are two sections. The left section is 'Select an existing Transactional category' with a dropdown menu showing 'Invoices'. The right section is 'Select' with a 'Create/Modify Element' button and two dropdown menus: 'OR modify/delete an existing calculated element: None Available' and 'OR add a calculated element from another category: one Available'. Below these is a 'Create New | Delete' tab. The 'Create New' tab is active, showing a 'Calculated Element Constructor'. It has two groups: 'Group 1' with a minus sign, an open parenthesis, a dropdown menu showing 'OrderQty', and a 'Constant' field; 'Group 2' with a plus sign, a minus sign, a multiplication sign, a division sign, and a closing parenthesis. Below the groups is an 'Expression Window' with the text 'Expression: ({Unit Price} - {Std. Unit Cost}) * {OrderQty}'. There are three buttons: 'Cancel' (yellow), 'Delete Last' (red), and 'Continue' (blue). At the bottom, there is a section 'Update element name, select YTD/QTD options, click DONE'. It has a text field 'Create/Update a name for element:', a note 'Note: You can also add YTD and QTD options to calculated elements.', two checkboxes 'Quarter To Date' and 'Year To Date', and a 'Select Post Or Pre Allocation' section with radio buttons for 'Pre' and 'Post'. There are three buttons: 'Cancel' (yellow), 'Redo Expression' (yellow), and 'DONE!' (blue).

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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”

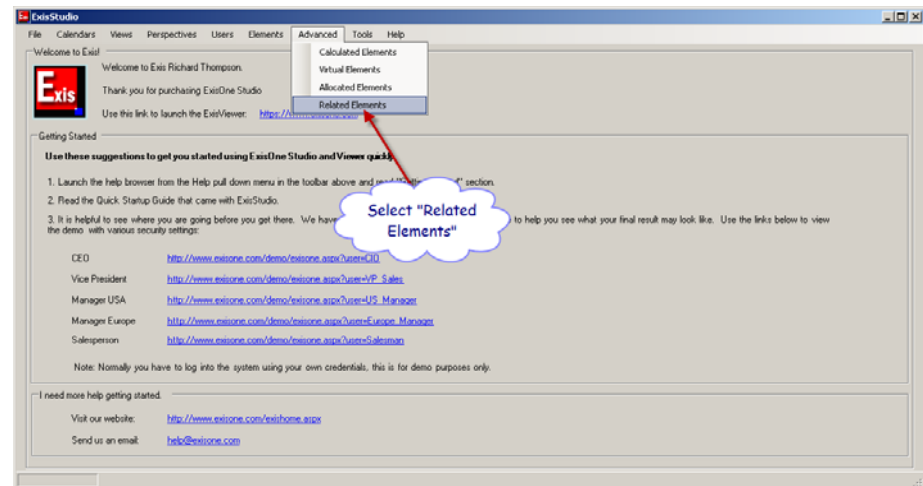
The screenshot shows the 'Calculated Elements' wizard interface. At the top, there's a title bar and a 'Click Here To Begin' button. Below, a section titled 'Add calculated elements' provides instructions. The main area is divided into 'Group 1' and 'Group 2' for building the expression. Group 1 contains a dropdown for 'OrderQty' and a 'Constant' field. Group 2 contains a '+' sign and a dropdown. The 'Expression' field shows the formula: $(\{Unit Price\} - \{Std. Unit Cost\}) * \{OrderQty\}$. Below the expression, there are 'Cancel', 'Delete Last', and 'Continue' buttons. The bottom section is for 'Update element name, select YTD/QTD options, click DONE'. It includes a text field for the element name (set to 'Margin'), checkboxes for 'Quarter To Date' and 'Year To Date' (both checked), and radio buttons for 'Pre' and 'Post' allocation (with 'Pre' selected). A 'Redo Expression' button and a 'DONE!' button are at the bottom. Annotations with red arrows point to the 'Enter "Margin"' text, the 'Check QTD & YTD' checkboxes, and the 'Click "Done"' button.



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”.

The screenshot shows a window titled "RelatedElements". It contains a "Welcome to related field definition" message and a "Click Here To Begin" button. Below this is a "Create New or Update Existing" section with a "Create New Relationship" button. The "Update/delete Existing Relationship:" dropdown is set to "None Available". The "Create New Relationship" section is active, showing a list of elements to select from: "Area Mgr.", "CEO", "Customer ID", "Customer Name", "Invoice", "Invoice Line", "Order #", and "Order Line". A red arrow points to "Customer ID" in the list, and a blue cloud callout says "Select 'Customer ID'". Below the list is a numbered list of instructions: 1. Select an element from the drop down to add to this relationship. 2. Click on column header to remove an element from relationship. 3. Rearrange order by dragging using the column header. 4. The first element is special and will represent the entire relationship. 5. Finally click the "Save This Relationship and continue" button.



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.

The screenshot shows the 'RelatedElements' application window. It has a title bar with the Exis logo and the text 'RelatedElements'. The main content area is divided into several sections. At the top, there is a 'Related Elements' section with a welcome message and two buttons: 'Click Here To Begin' and 'Help'. Below this is a 'Create New or Update Existing' section with a 'You can:' label and a 'Create New Relationship' button. There is also an 'Update/delete Existing Relationship:' dropdown menu showing 'None Available'. The main section is titled 'Create New Relationship' and 'Delete'. It contains an 'Update Relationship' section with a note: 'Please note that for a relationship to be meaningful, it must have at least one element'. Below this is a table with two columns: 'Customer ID' and 'Customer Name'. The table has two rows, both with 'Customer ID' and 'Customer Name' in the first column and 'Customer Name' in the second column. To the right of the table is a blue button labeled 'Save this relationship and continue'. A red arrow points from a speech bubble that says 'Click "Save this relationship and continue"' to the button. At the bottom of the window, there is a list of instructions: 1. Select an element from the drop down to add to this relationship. 2. Click on column header to remove an element from relationship. 3. Rearrange order by dragging using the column header. 4. The first element is special and will represent the entire relationship. 5. Finally click the "Save This Relationship and continue" button.

Related Elements

Welcome to related field definition. Often, codes are used instead of descriptive names. For example product code instead of product name. Codes are short and reduce errors due to misspelling. But, it is much more convenient to have descriptions in reports and displays. When element for code is related to the element for descriptive name, ExisOne, as default, will display all data with descriptive names. But, when it is useful, and if elements are related, ExisOnce can display both code and descriptive name, for example customer number and customer name or territory code and territory name.

[Click Here To Begin](#) [Help](#)

Create New or Update Existing

You can: [Create New Relationship](#)

Update/delete Existing Relationship: [None Available](#)

Create New Relationship | Delete

Update Relationship - Please note that for a relationship to be meaningful, it must have at least one element

Select an element

Customer ID	Customer Name
Customer ID	Customer Name

[Save this relationship and continue](#)

1. Select an element from the drop down to add to this relationship.
2. Click on column header to remove an element from relationship.
3. Rearrange order by dragging using the column header.
4. The first element is special and will represent the entire relationship.
5. Finally click the "Save This Relationship and continue" button

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

1st Element

Product Id
Salesman ID
Territory ID

2nd Element

Product Name
Salesman Name
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

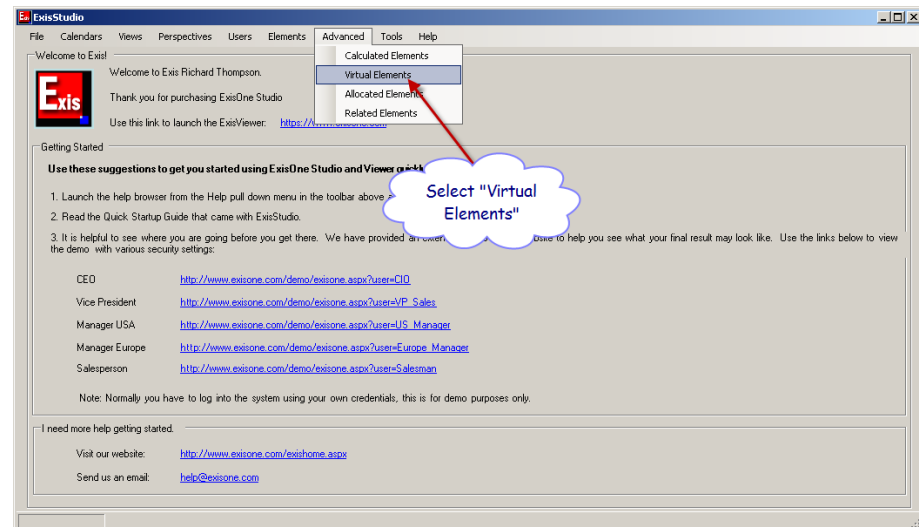




DEFINE VIRTUAL ELEMENTS

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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Email: info@exisone.com



Click “Click Here to Begin”.

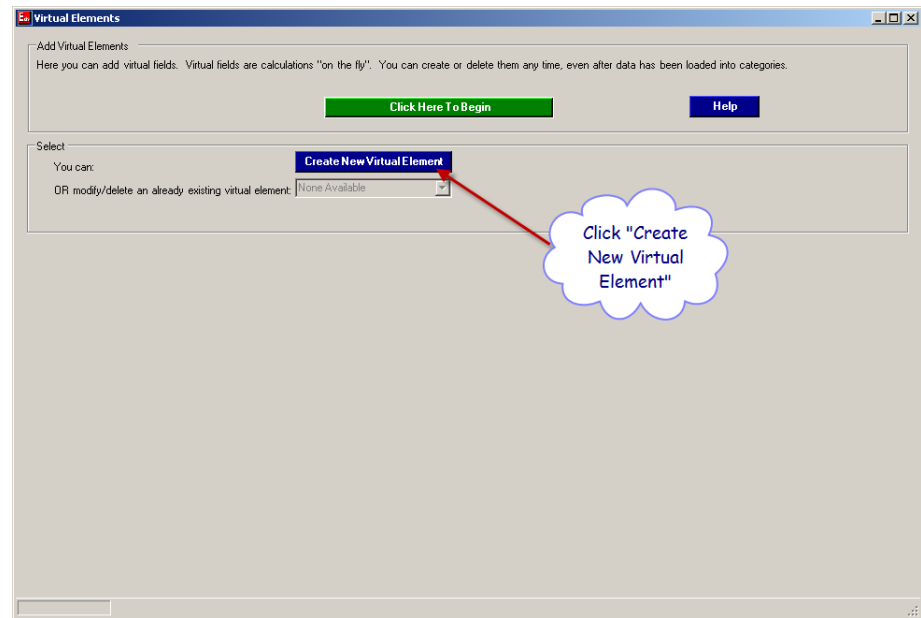


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You are going to create a virtual element
“Margin %”. Expression is $(\text{Margin} - (\text{Unit Std. Cost} * \text{Qty Sold}) * 100) / (\text{Unit Std. Cost} * \text{Qty Sold})$

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.

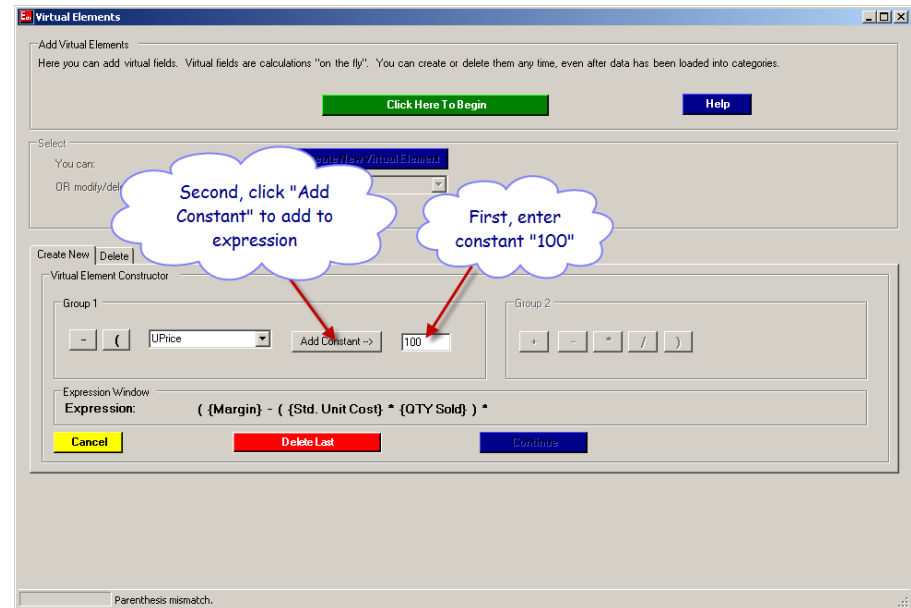
Construct the expression up to:
 $(\{Margin\} - (\{Std. Unit Cost\} * \{Qty Sold\})) *$

A screenshot of the 'Virtual Elements' window in a software application. The window has a title bar with the text 'Virtual Elements'. Inside, there's a section titled 'Add Virtual Elements' with a description: 'Here you can add virtual fields. Virtual fields are calculations "on the fly". You can create or delete them any time, even after data has been loaded into categories.' Below this are two buttons: 'Click Here To Begin' (green) and 'Help' (blue). A 'Select' section follows, with a 'You can:' label and a 'Create New Virtual Element' button. Below that is a dropdown menu labeled 'OR modify/delete an already existing virtual element:' with 'None Available' selected. The main area is titled 'Virtual Element Constructor' and contains two groups, 'Group 1' and 'Group 2'. 'Group 1' has a minus sign button, an opening parenthesis button, a dropdown menu showing 'QTY Sold', an 'Add Constant ->' button, and an empty text box. 'Group 2' has a plus sign button, a minus sign button, a multiply sign button, a divide sign button, and a closing parenthesis button. Below these groups is an 'Expression Window' showing the expression: '{Margin} - ({Std. Unit Cost} * {QTY Sold}) *'. At the bottom of the window are three buttons: 'Cancel' (yellow), 'Delete Last' (red), and 'Continue' (blue). A status bar at the very bottom of the window displays the message 'Parenthesis mismatch.'

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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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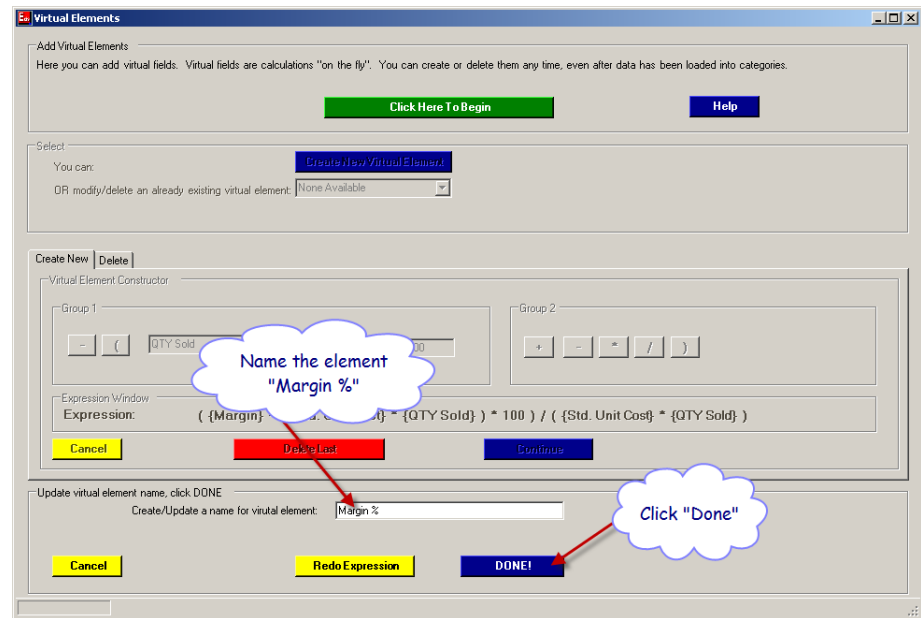
Complete the expression and then click
“Continue” button.

The screenshot shows a software window titled "Virtual Elements". It contains several sections: a top section with a green "Click Here To Begin" button and a blue "Help" button; a "Select" section with a "Create New Virtual Element" button and a dropdown menu currently set to "None Available"; and a "Virtual Element Constructor" section. This constructor section includes two groups of controls: "Group 1" with a minus sign, an opening parenthesis, a dropdown menu showing "QTY Sold", an "Add Constant ->" button, and a text field containing "100"; and "Group 2" with a plus sign, a minus sign, a multiplication sign, a division sign, and a closing parenthesis. Below these groups is an "Expression Window" showing the expression:
$$\{ \text{Margin} \} - \{ \text{Std. Unit Cost} \} * \{ \text{QTY Sold} \} * 100 / \{ \text{Std. Unit Cost} \} * \{ \text{QTY Sold} \}$$
 At the bottom of the constructor section are three buttons: a yellow "Cancel" button, a red "Delete Last" button, and a blue "Continue" button. A red arrow points from a blue cloud-shaped callout containing the text "Click 'Continue'" to the "Continue" button.

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



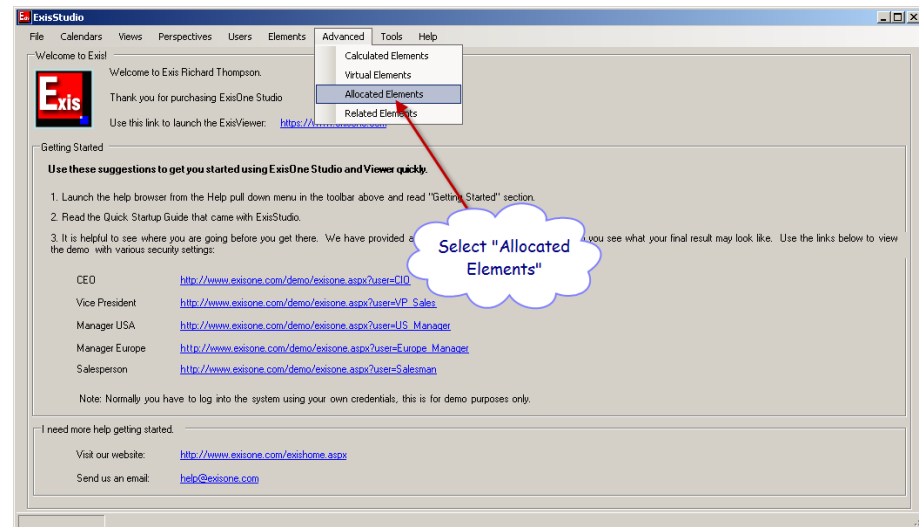


DEFINE ALLOCATED ELEMENTS

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.

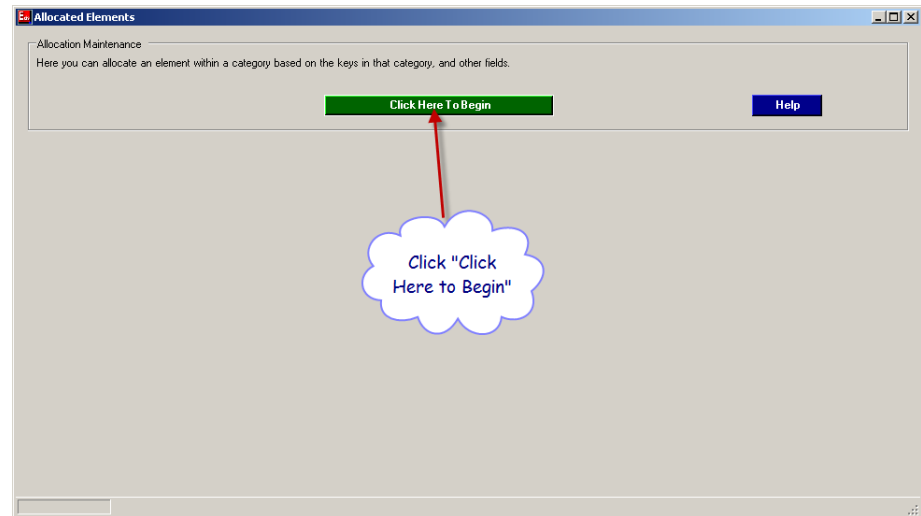
Select “Allocated Elements” from the “Advanced” menu



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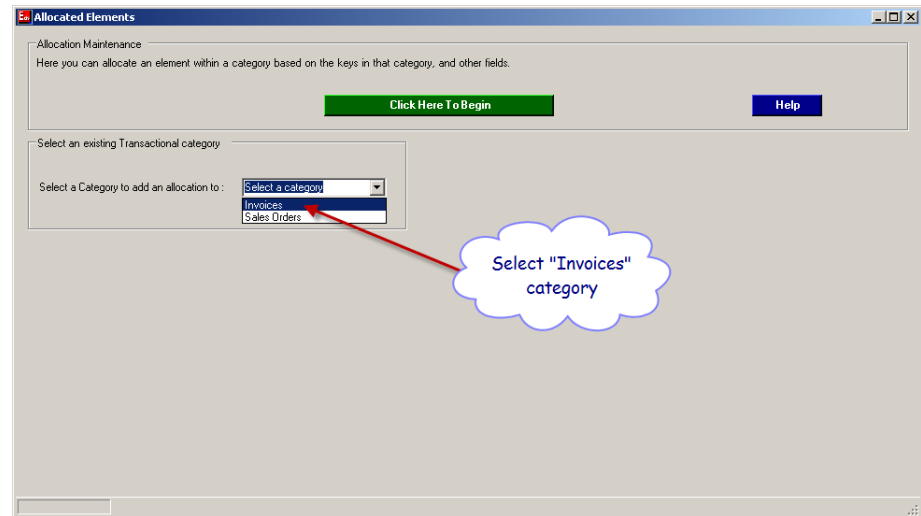
Click "Click Here to Continue".



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Select "Invoices" category.

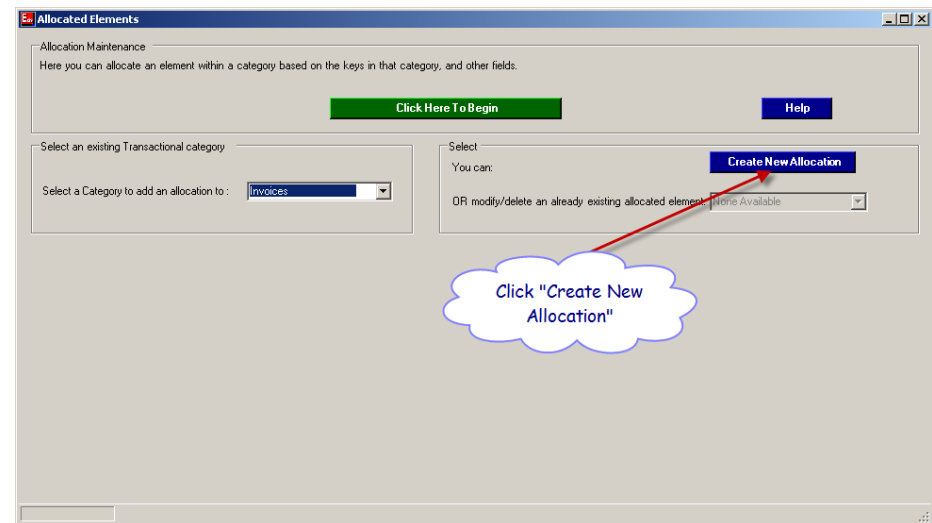


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Click “Create New Allocation”.

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.

The screenshot shows a software window titled "Allocated Elements". Inside, there's a section "Allocation Maintenance" with a "Click Here To Begin" button and a "Help" button. Below this, there are two main sections. The left section, "Select an existing Transactional category", has a dropdown menu currently showing "Invoices". The right section, "Select", has a "Create New Allocation" button and a dropdown menu showing "None Available". Below these is the "Allocated Element Constructor" section. It contains three dropdown menus: "Select Element To Allocate" (showing a list with "Freight" at the bottom), "Select element to be used as basis for allocation" (showing "Use For Basis"), and "Key Level" (showing "Use For key"). A yellow "Cancel" button is at the bottom left of the constructor section. A red arrow points from a blue callout bubble containing the text "Select 'Freight'" to the "Freight" option in the "Select Element To Allocate" dropdown list.

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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.

The screenshot shows a software window titled "Allocated Elements". It contains several sections: "Allocation Maintenance" with a "Click Here To Begin" button and a "Help" button; a section for selecting a transactional category with a dropdown menu showing "Invoices"; a section for selecting an element to allocate with a dropdown menu showing "Freight"; a section for selecting an element to be used as a basis for allocation with a dropdown menu showing "Weight"; and a section for selecting a key level with a dropdown menu showing "Invoice". At the bottom, there are "Cancel" and "Done" buttons. A red arrow points from a cloud-shaped callout containing the text "Click 'Done'" to the "Done" button.



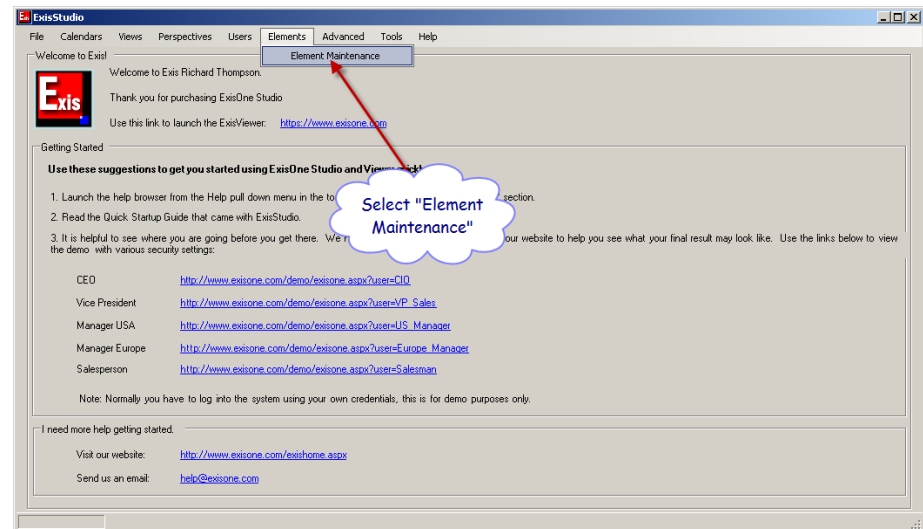
ELEMENT MAINTENANCE

“Element maintenance” allow you to:

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

Start ExisStudio.

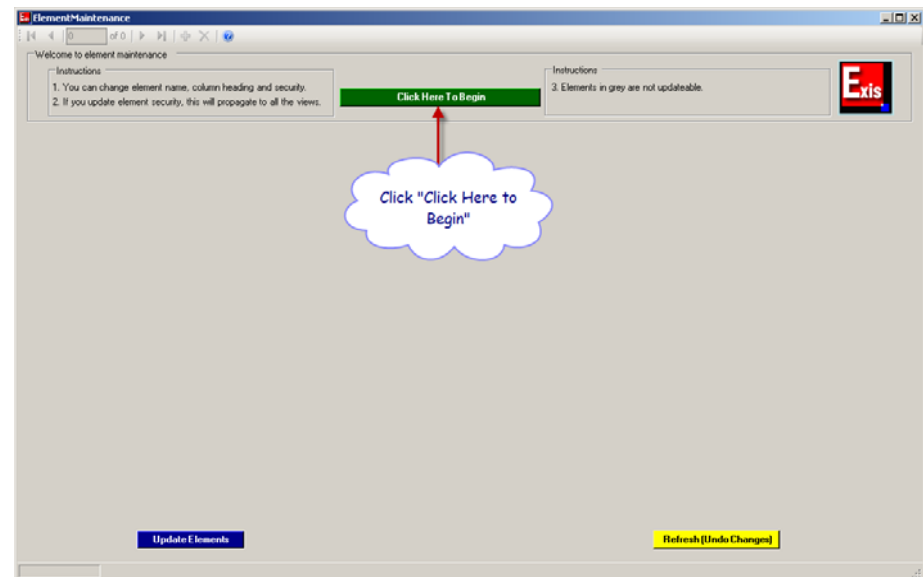
Select “Element Maintenance” from
“Elements” menu.



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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.

ElementMaintenance

Welcome to element maintenance

Instructions

1. You can change element name, column heading and security.
2. If you update element security, this will propagate to all the views.

[Click Here To Begin](#)

Instructions

3. Elements in grey are not updatable.

Update Elements

Element Id	Element Name	Element Heading	Element Type	Security	Parent Element	Date Created	Date Modified	User Created	Modified By
43	QTD of OrderQty	QTD of OrderQty	Monetary	Users	-	5/17/2009 12:21...	5/19/2009 2:33...	sa2	sa2
16	QTD of QTY Sold	QTD of QTY Sold	Monetary	Users	-	5/17/2009 12:04...	5/19/2009 2:33...	sa2	sa2
17	QTD of Sales \$	QTD of Sales \$	Monetary	Users	-	5/17/2009 12:04...	5/19/2009 2:33...	sa2	sa2
18	QTD of Weight	QTD of Weight	Monetary	Users	-	5/17/2009 12:04...	5/19/2009 2:33...	sa2	sa2
5	QTY Sold	QTY Sold	Monetary	Users	-	5/16/2009	5/19/2009 2:33...	sa2	sa2
9	Sales \$	Sales \$	Monetary	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
24	Sales VP	Sales VP	Alphanumeric	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
4	Salesman ID	Salesman ID	Alphanumeric	Users	-	5/16/2009	5/19/2009 2:33...	sa2	sa2
20	Salesman Name	Salesman Name	Alphanumeric	Users	Salesman ID	5/17/2009	5/19/2009 2:33...	sa2	sa2
27	Std. Unit Cost	Std. Unit Cost	Monetary	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
21	Territory ID	Territory ID	Alphanumeric	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
22	Territory Mgr	Territory Mgr	Alphanumeric	Users	Territory ID	5/17/2009	5/19/2009 2:33...	sa2	sa2
7	Unit Price	Unit Price	Monetary	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
29	Unit Weight	Unit Weight	Monetary	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
9	Weight	Weight	Monetary	Users	-	5/17/2009	5/19/2009 2:33...	sa2	sa2
15	YTD of Freight	YTD of Freight	Monetary	Users	-	5/17/2009 12:04...	5/19/2009 2:33...	sa2	sa2
46	YTD of Margin	YTD of Margin	Monetary	Users	-	5/17/2009 12:53...	5/19/2009 2:33...	sa2	sa2
42	YTD of Order \$	YTD of Order \$	Monetary	Users	-	5/17/2009 12:21...	5/19/2009 2:33...	sa2	sa2
41	YTD of OrderQty	YTD of OrderQty	Monetary	Users	-	5/17/2009 12:21...	5/19/2009 2:33...	sa2	sa2

[Update Elements](#) [Refresh \(Undo Changes\)](#)

You may not have two elements with the same name

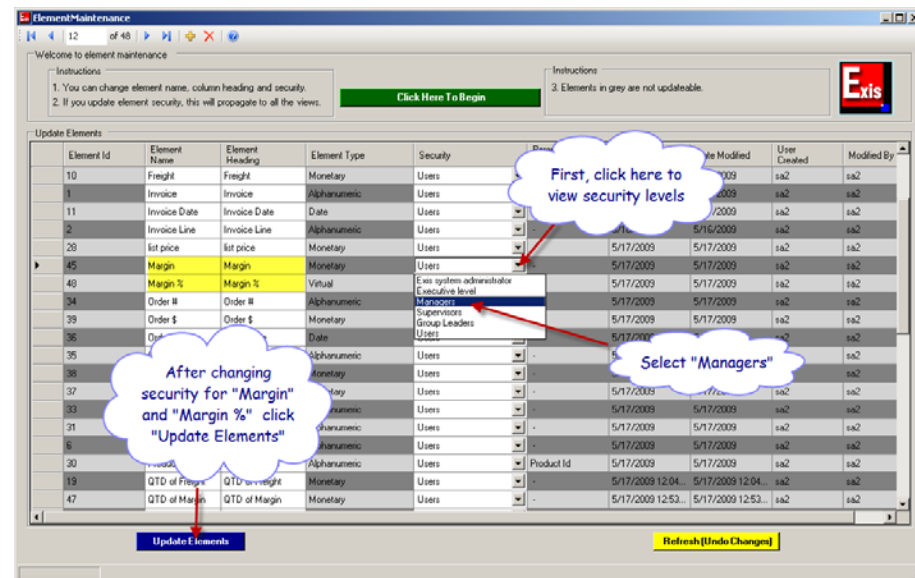


Now scroll until you can see elements “Margin” and “Margin %”.

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”.



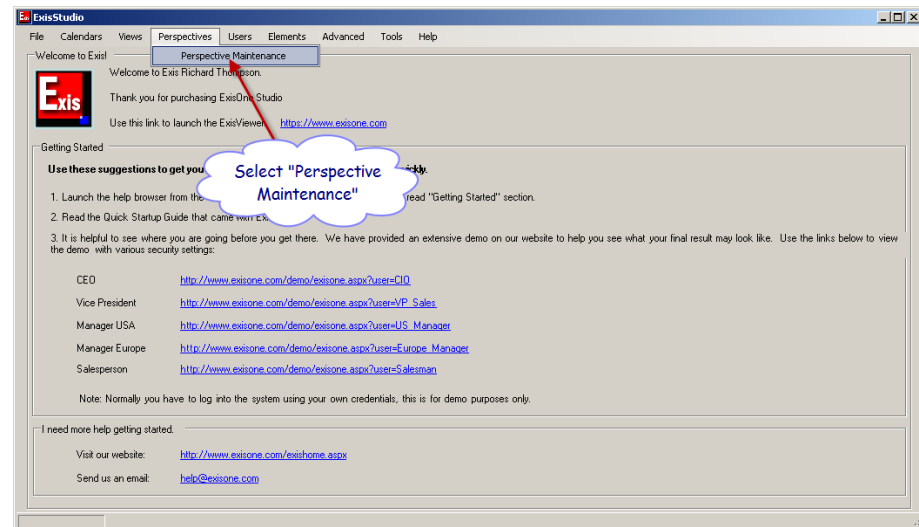


DEFINE PERSPECTIVES

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.

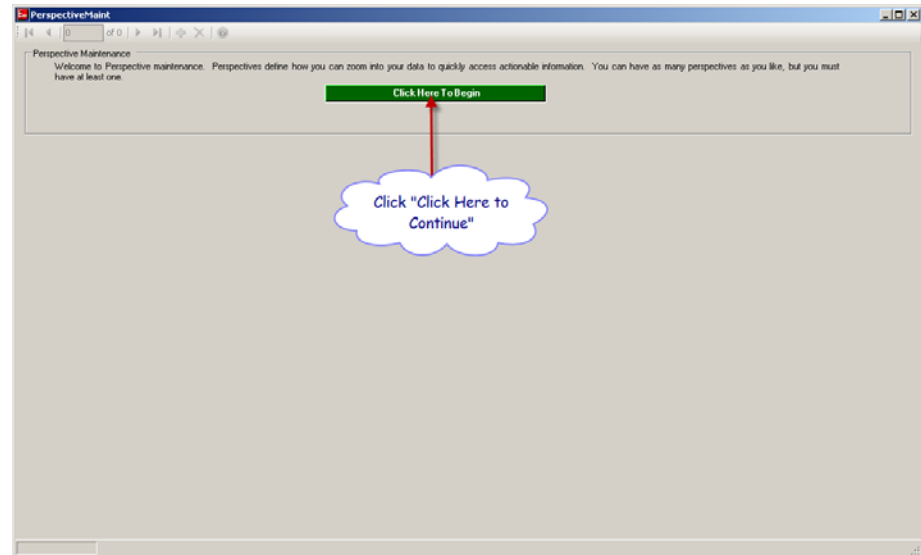
Select “Perspective Maintenance” from “Perspective” menu.



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Randolph, NJ 07869
Tel: (973) 933-2423
Email: info@exisone.com



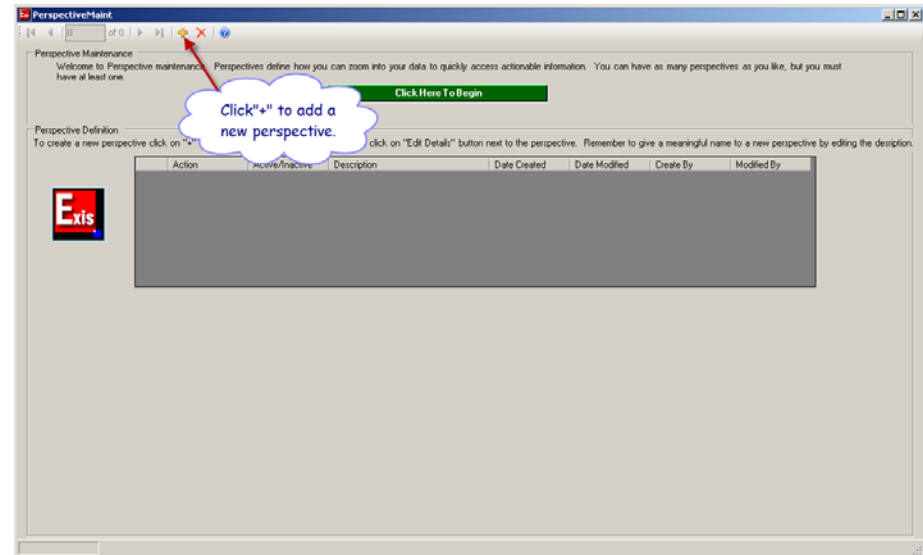
Click green “Click Here to Continue” button.



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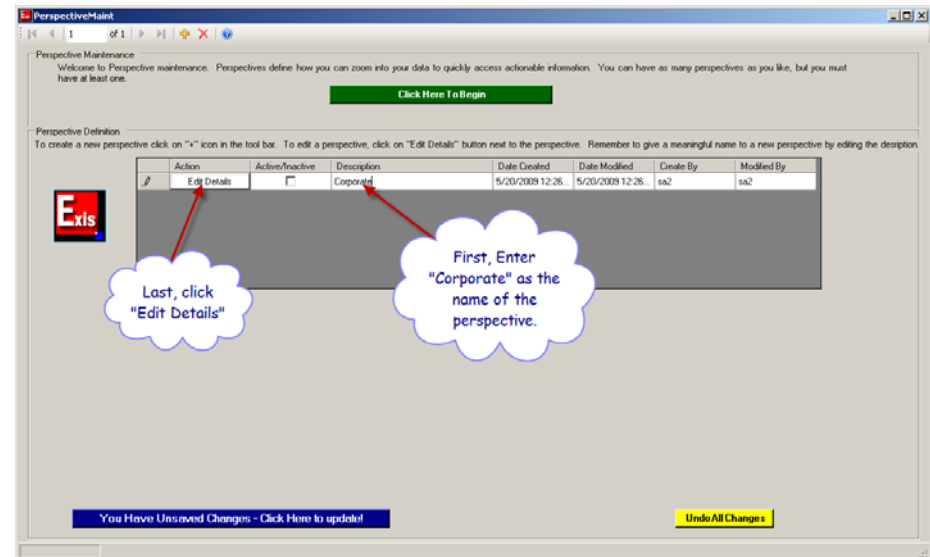
Perspective controls how to zoom-in for more details. First you will create a corporate perspective for CEO, VP-Sales, Click “+” in the toolbar to add a new perspective.



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



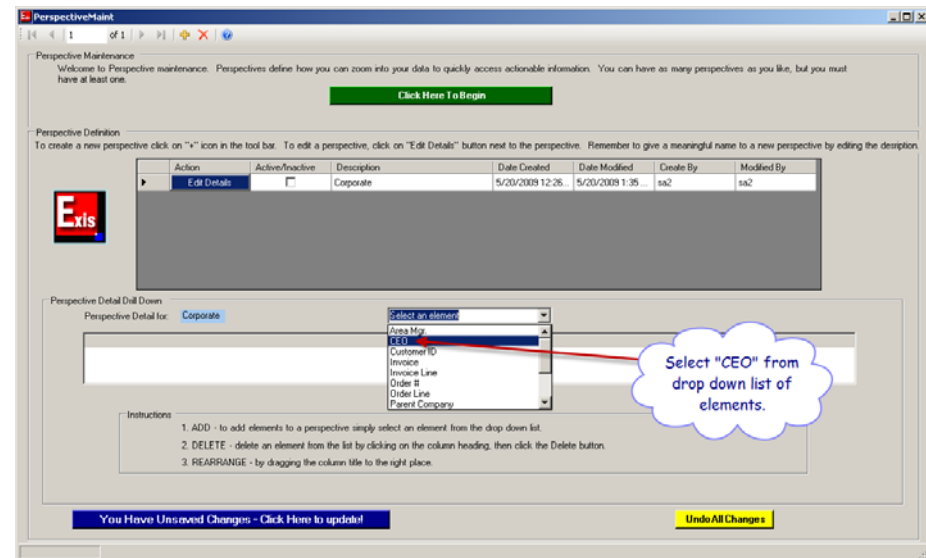


A perspective is an orderly list of key elements.

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.



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Now add the following elements to the perspective:

Sales VP

Area Mgr

Territory ID

Salesman ID

Customer ID

The screenshot shows a web application window titled "PerspectiveMaintenance". It contains a "Perspective Definition" section with a table of existing perspectives. The table has columns for Action, Active/Inactive, Description, Date Created, Date Modified, Create By, and Modified By. There is one row with the description "Corporate". Below the table is a "Perspective Detail Drill Down" section with a dropdown menu for "Select an element" and a list of elements: Area Mgr, Customer ID, Invoice, Invoice Line, Order #, Order Line, Parent Company, and Product. At the bottom, there are instructions for adding, deleting, and rearranging elements, and buttons for "You Have Unsaved Changes - Click Here to update!" and "Undo All Changes".

Action	Active/Inactive	Description	Date Created	Date Modified	Create By	Modified By
Edit Details	<input type="checkbox"/>	Corporate	5/20/2009 12:28...	5/20/2009 1:35...	ra2	ra2

Perspective Detail Drill Down

Perspective Detail for: Corporate

Select an element

- Area Mgr
- Customer ID
- Invoice
- Invoice Line
- Order #
- Order Line
- Parent Company
- Product

Instructions

1. ADD - to add elements to a perspective simply select an element from the drop down list.
2. DELETE - delete an element from the list by clicking on the column heading, then click the Delete button.
3. REARRANGE - by dragging the column title to the right place.

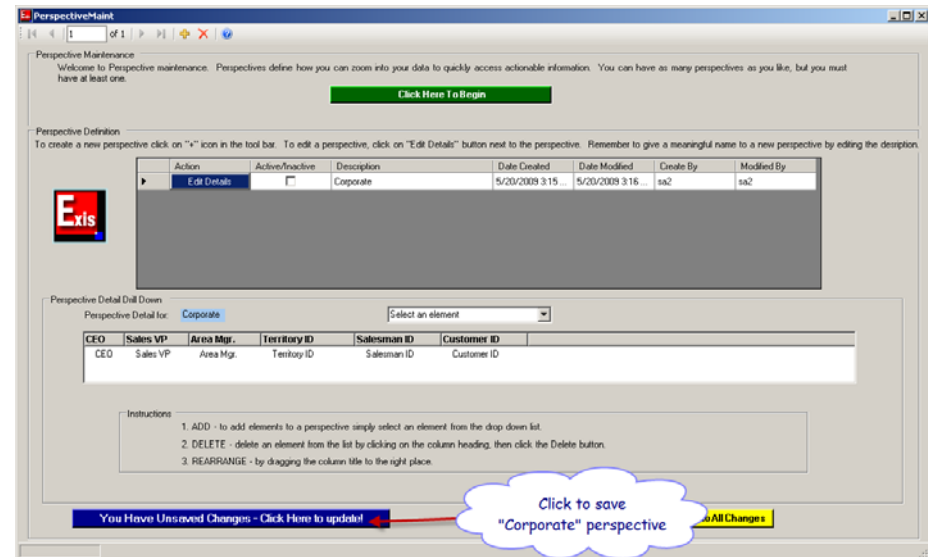
You Have Unsaved Changes - Click Here to update!

Undo All Changes

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



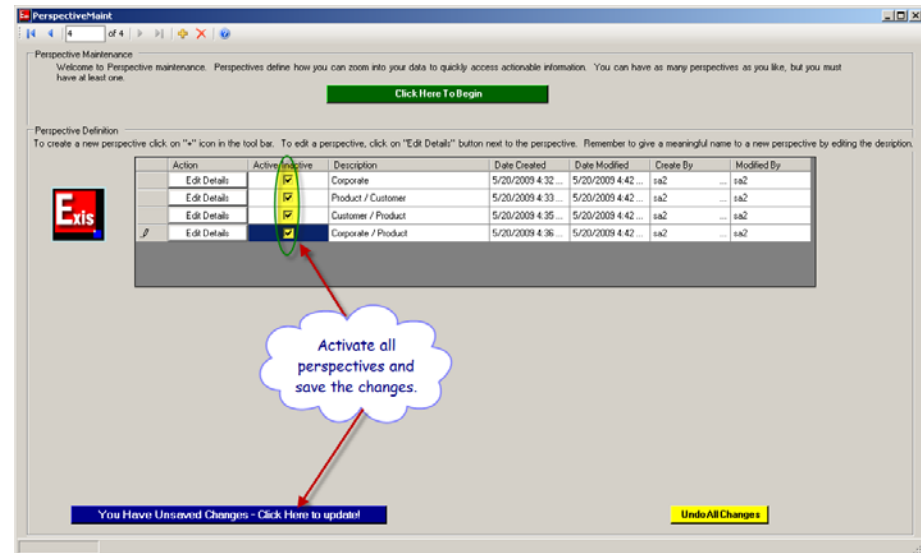


Now define the following three perspectives with elements shown in the table.

	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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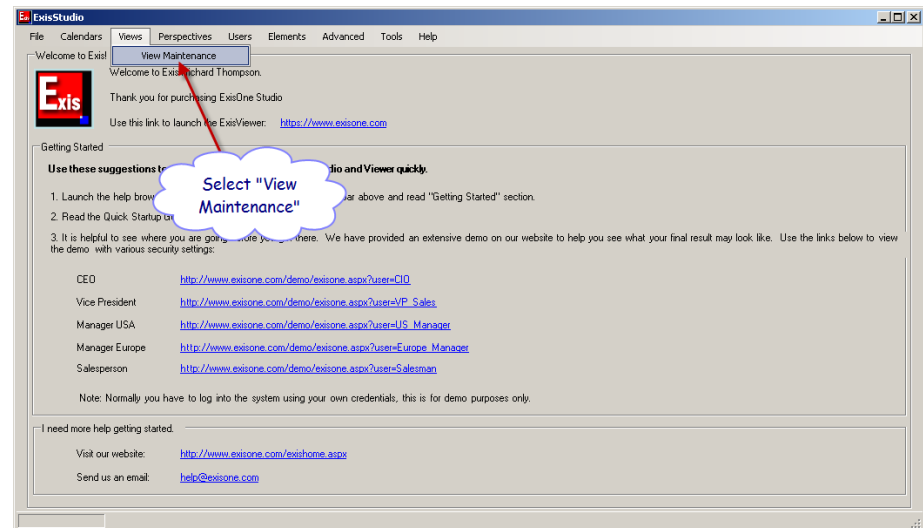


DEFINE VIEWS

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.

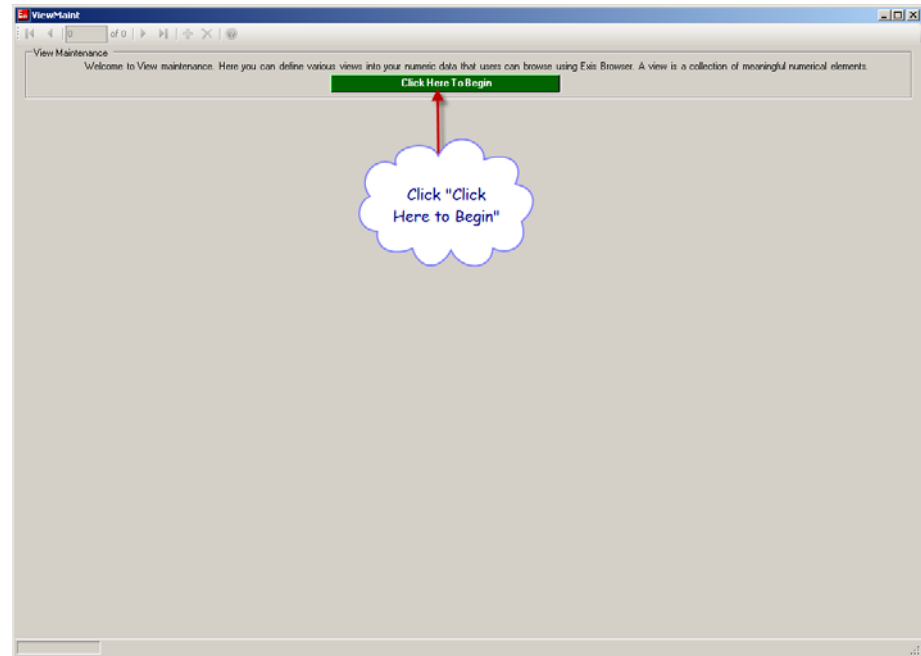
Select “View Maintenance” from the “Views” menu.



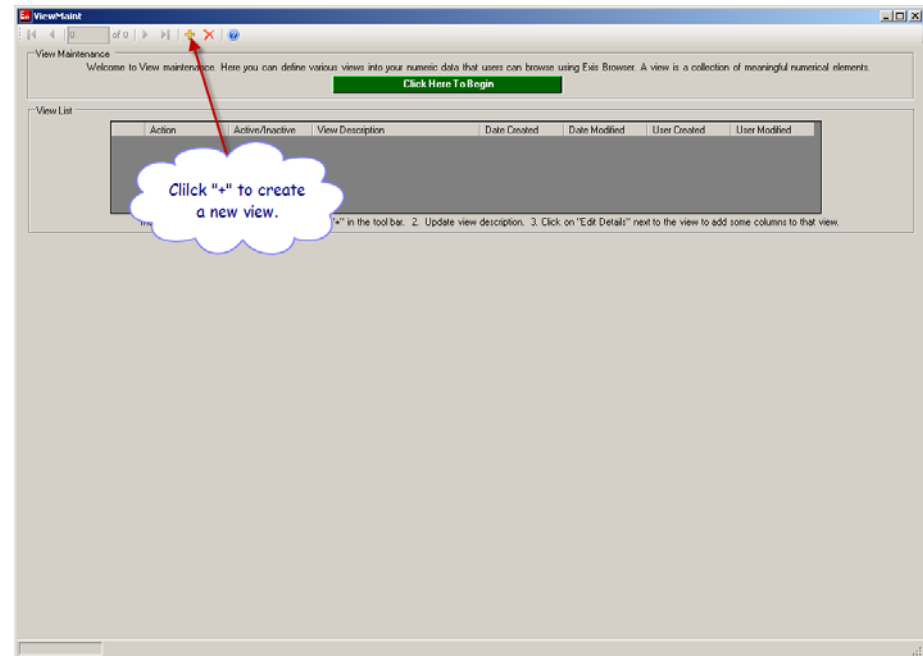
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Click “Click Here to Begin” button.



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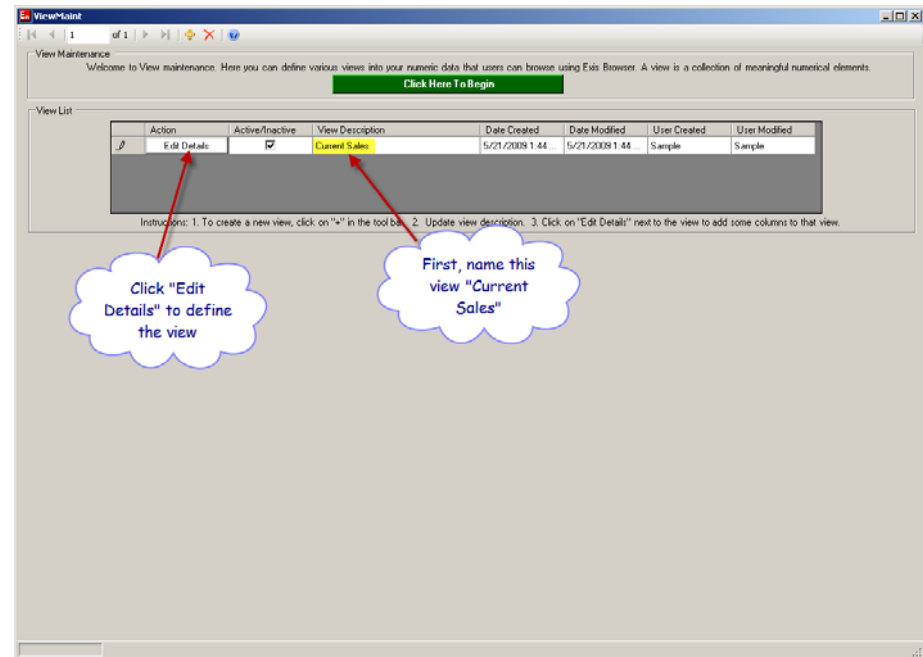
Click “+” in the toolbar to add a view.

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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.

The screenshot shows the 'View Maintenance' window in the Exis software. The window has a title bar with 'ViewMaint' and standard window controls. Below the title bar, there's a 'View Maintenance' section with a welcome message and a 'Click Here To Begin' button. The main section is 'View List', 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 'Current Sales' with an 'Edit Details' link. Below the table are instructions. The 'View Layout' section is also visible, showing a 'View: Current Sales' dropdown and a 'Select an element' dropdown menu. The 'Select an element' menu is open, showing a list of elements: QTD of QTY Sold, QTD of Sales \$, QTD of Weight, QTY Sold, Sales \$, End Unit Cost, Unit Weight, and Weight. The 'Sales \$' element is highlighted. A red arrow points from a blue cloud-shaped callout containing the text 'Select "Sales \$"' to the 'Sales \$' element in the dropdown menu. At the bottom of the window, there are two buttons: 'You Have Unsaved Changes - Click Here to update!' and 'Undo Changes'.



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.

The screenshot shows the 'ViewMaintain' application window. The 'View List' table contains one entry: 'Current Sales' with an 'Edit Details' button. The 'View Layout' section shows a table with columns: Sales \$, Qty Sold, QTD of Sales \$, QTD Qty Sold, Sales \$YTD, and YTD Qty Sold. The 'Column Properties' panel is open for 'YTD Qty Sold', showing 'YTD Qty Sold' as the column title, 'CURRENT MONTH' as the fiscal period, and 'Visible' checked. A red arrow points from a cloud bubble saying 'Add these elements to "Current Sales"' to the 'YTD Qty Sold' column in the layout. Another red arrow points from a cloud bubble saying 'Save changes to view' to the 'Save Changes To Column?' button. At the bottom, there are buttons for 'You Have Unsaved Changes - Click Here to update!' and 'Undo Changes'.



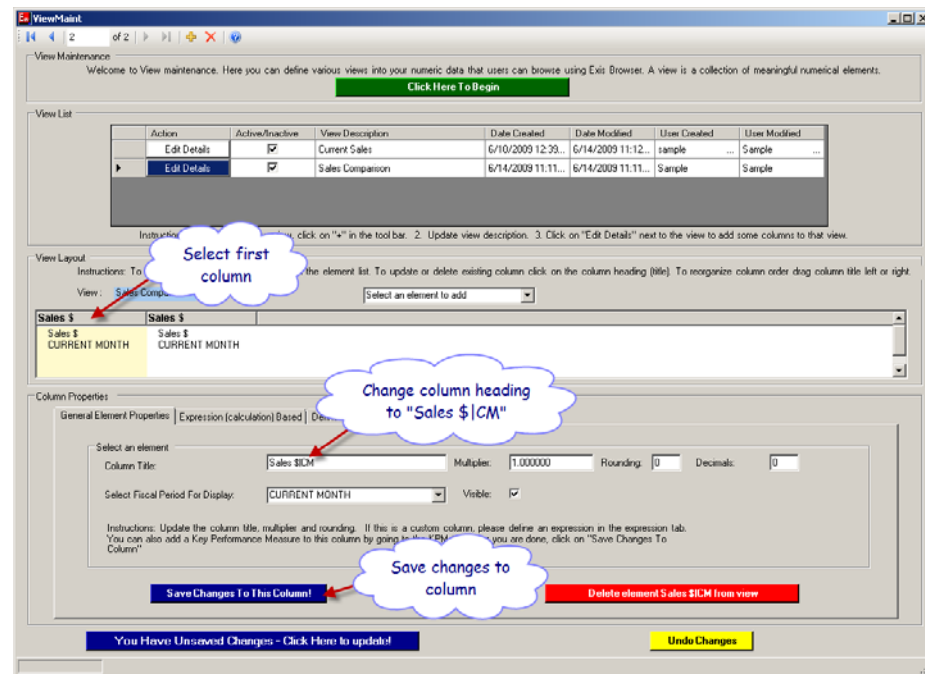
Add second view “Sales Comparison”.

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.





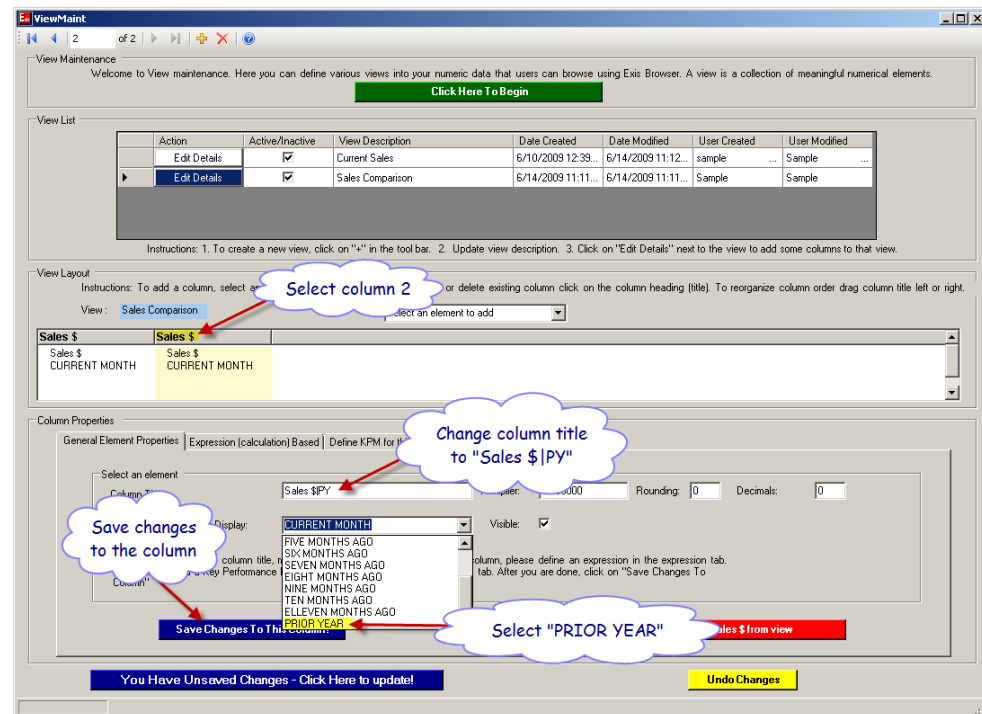
As default current period's data is displayed. But, you can offset the period to display data for a prior period. Just select the period from the drop down list.

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

Change column title to "Sales \$|PY".

Select "PRIOR YEAR" from the drop down list.

Save changes.





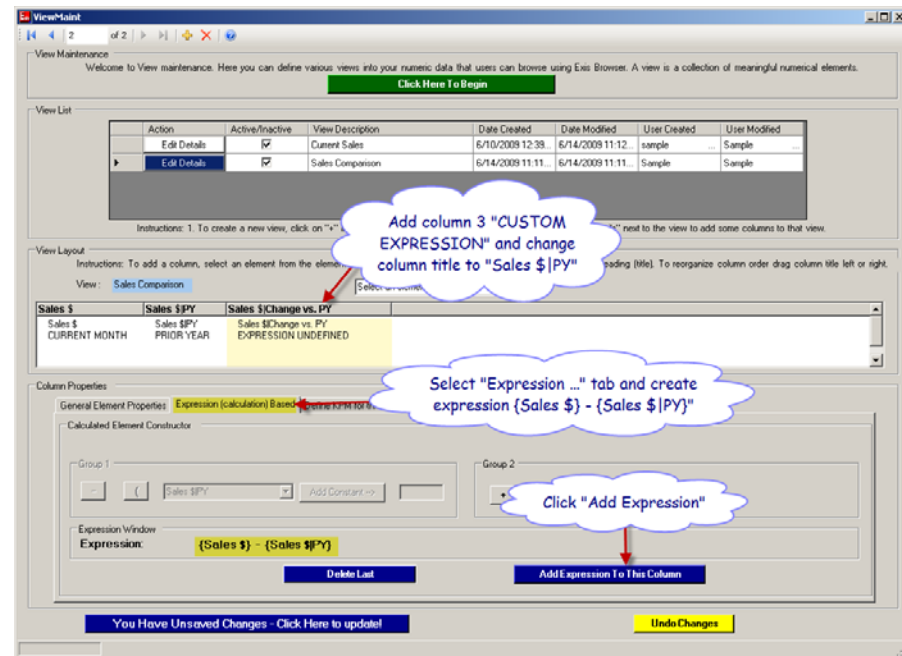
Note that after saving the column 2 is now “PRIOR YEAR”.

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”.



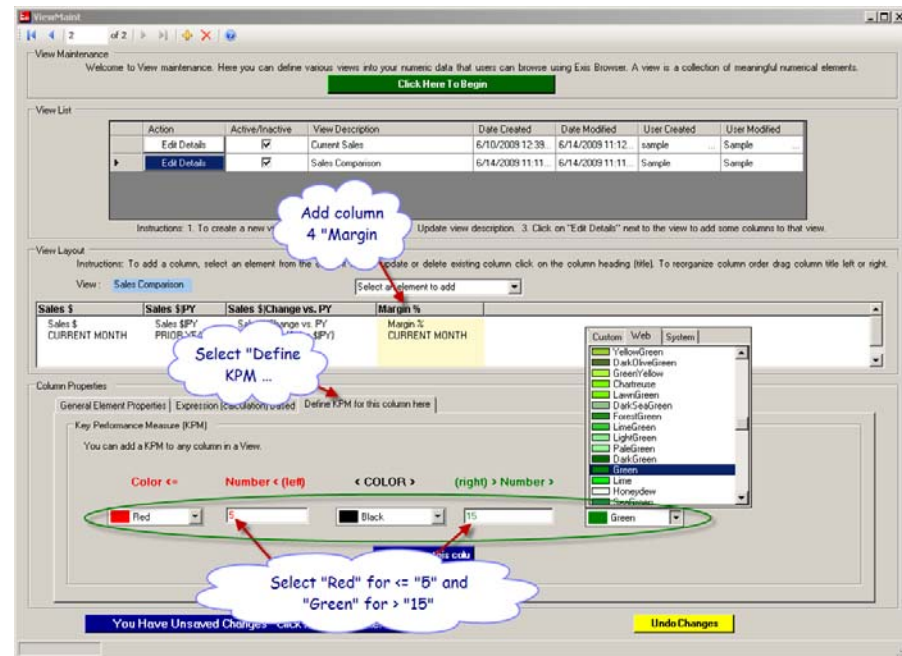


Key Performance Measure or KPM is data that are critical to decision makers. It is useful if the KPM data is presented to quickly draw the attention of the person who is looking at the data. In this sample data, Margin % is considered a KPM. The following is setup to display Margin of 2% or less in red,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

The screenshot shows the 'View Maintenance' application window. At the top, there's a 'View Maintenance' title bar and a navigation bar with 'of 2' and some icons. Below the title bar, a welcome message says '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.' A green button labeled 'Click Here To Begin' is present. The 'View List' section contains a table with columns: Action, Active/Inactive, View Description, Date Created, Date Modified, User Created, and User Modified. The table has two rows: 'Current Sales' and 'Sales Comparison'. The 'Sales Comparison' row is selected, and its 'Edit Details' button is highlighted. Below the table, instructions are provided: '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 a 'View: Sales Comparison' dropdown and a 'Select an element to add' dropdown. Below these, a table displays the current view layout with columns: Sales \$, Sales \$PY, Sales \$Change vs. PY, and Margin %. The 'Sales \$' column is highlighted in yellow. The 'Column Properties' section has tabs for 'General Element Properties', 'Expression (calculation) Based', and 'Define KPM for this column here'. The 'Define KPM' tab is active, showing a 'Key Performance Measure (KPM)' section with a text area and a 'You can add a KPM to any column in a View.' message. Below this, there are color and number selection options: 'Color <= Number < (left)' with a red color box and a value of 5, '< COLOR > (right) > Number >' with a black color box and a value of 15, and '>= Color' with a green color box. A blue button labeled 'Add KPM to this column' is highlighted with a red arrow and a callout bubble saying 'Click "Add KPM ..."'. At the bottom, a blue button labeled 'You Have Unsaved Changes - Click Here to update!' is highlighted with a red arrow and a callout bubble saying 'Save changes', and a yellow button labeled 'Undo Changes' is also present.



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: <table><tr><th>Value</th><th>Multiplier</th><th>Decimal</th><th>Display</th></tr><tr><td>123,456</td><td>.001</td><td>0</td><td>123</td></tr><tr><td>1,234,567</td><td>.001</td><td>0</td><td>1235</td></tr><tr><td>1,234,567</td><td>.001</td><td>2</td><td>1,234.56</td></tr><tr><td>123,456</td><td>0.78</td><td>0</td><td>96,296</td></tr><tr><td>123,456</td><td>.0.78</td><td>2</td><td>96,295.68</td></tr><tr><td>123,456</td><td>100</td><td>0</td><td>12,345,600</td></tr></table>	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
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	<p>.</p> <p>Rounds to the number of digits left or right of the decimal. E.G.</p> <table><tr><th>Value</th><th>Rounding</th><th>Decimal</th><th>Display</th></tr><tr><td>123.456</td><td>2</td><td>3</td><td>123.460</td></tr><tr><td>1,234,567</td><td>2</td><td>0</td><td>1,234,567</td></tr><tr><td>1,234,567</td><td>−3</td><td>0</td><td>1,235,000</td></tr></table>	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												
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																												



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”.

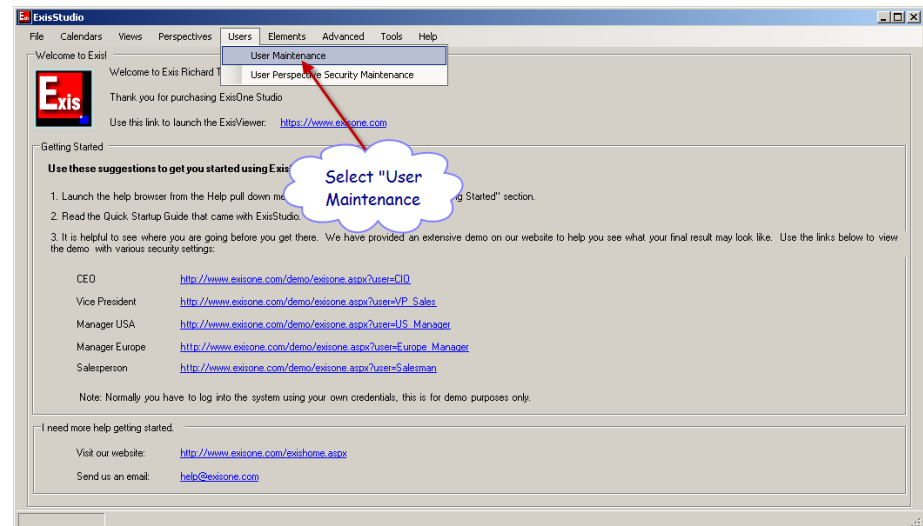
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CREATE USERS

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

Select “User Maintenance” from “Users” menu.



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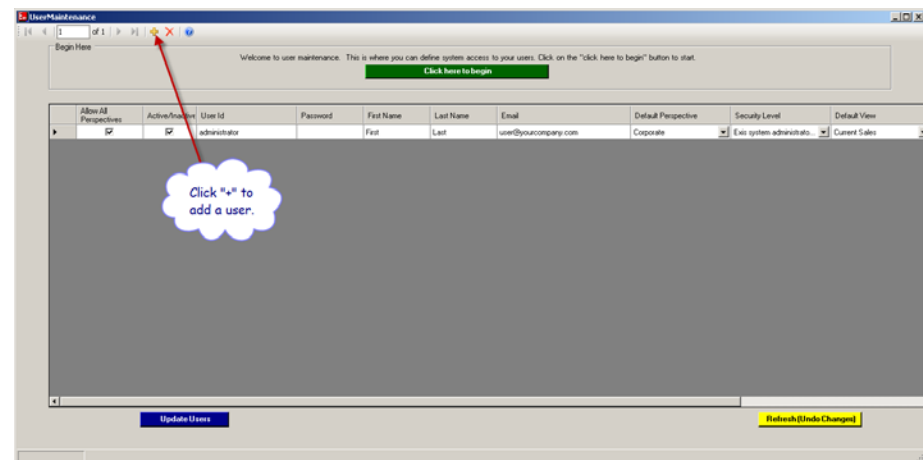
Click “Click here to begin” to start authorizing users.



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

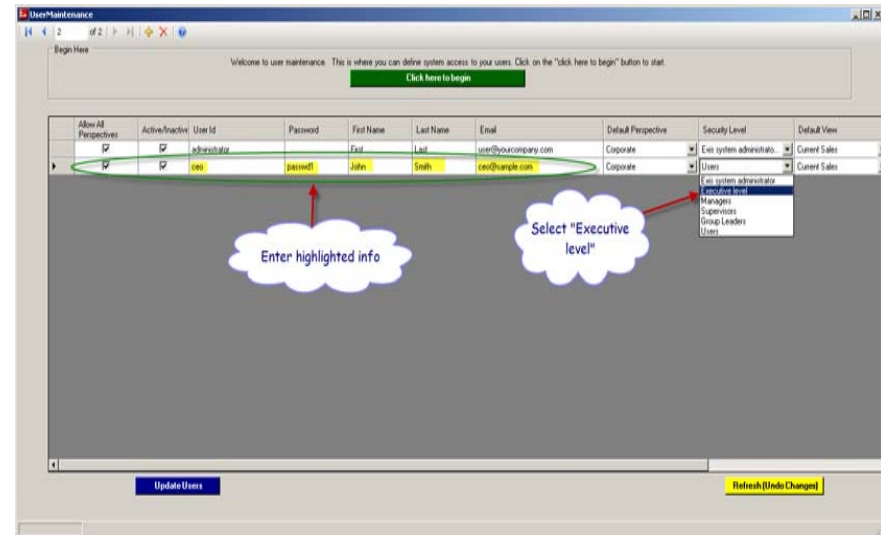


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Enter the following data:

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..

The screenshot shows a window titled "UserMaintenance". At the top, there is a message: "Welcome to user maintenance. This is where you can define system access to your users. Click on the 'click here to begin' button to start." Below this message is a green button labeled "Click here to begin".

Below the message is a table with the following columns: Allow All Perspectives, Active/Inactive, User Id, Password, First Name, Last Name, Email, Default Perspective, Security Level, Default View, and Create. The table contains four rows of user data:

Allow All Perspectives	Active/Inactive	User Id	Password	First Name	Last Name	Email	Default Perspective	Security Level	Default View	Create
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	administrator		First	Last	user@yourcompany.com	Corporate	Exis system administrato...	Current Sales	sa
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ceo	passwd1	Christopher	Dubover	cdubover@sample.com	Corporate	Executive level	Daily Status	Sam
<input type="checkbox"/>	<input checked="" type="checkbox"/>	manager	passwd2	Igor	Wassef	iwassef@sample.com	Corporate	Managers	Current Sales	Sam
<input type="checkbox"/>	<input checked="" type="checkbox"/>	salesman	passwd3	Howard	Stillman	hstillman@user.com	Customer / Product	Users	Sales Comparison	Sam

At the bottom of the window, there are two buttons: "Update Users" (blue) and "Refresh (Undo Changes)" (yellow).



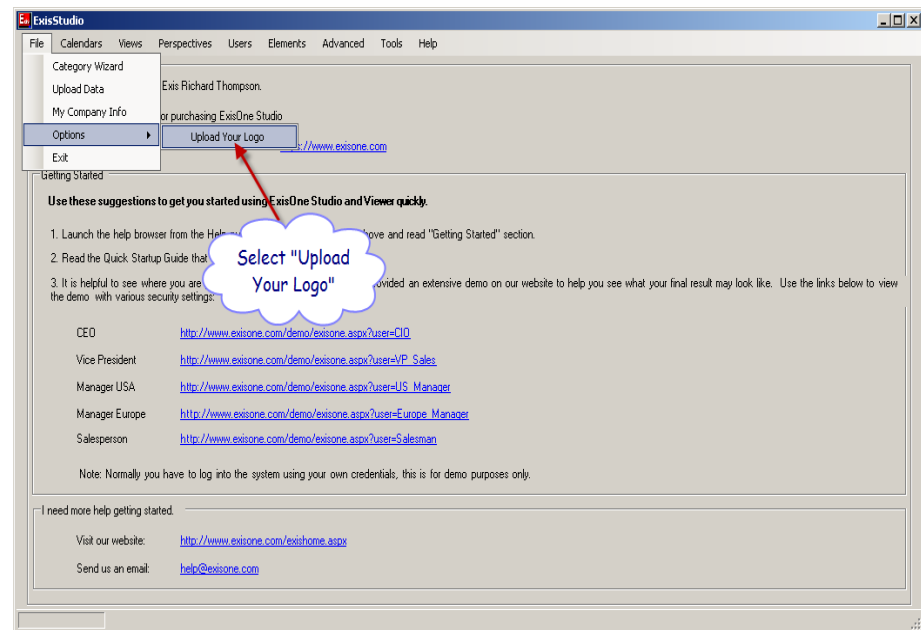
UPLOAD LOGO

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 than 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.





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



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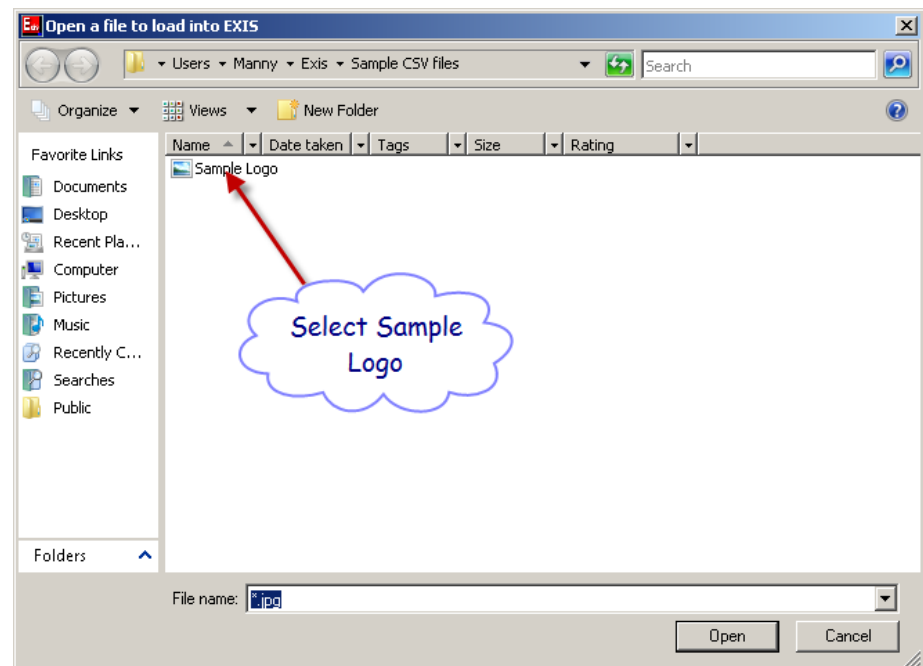
Click "Click Here to Select File" to select your logo file.



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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.



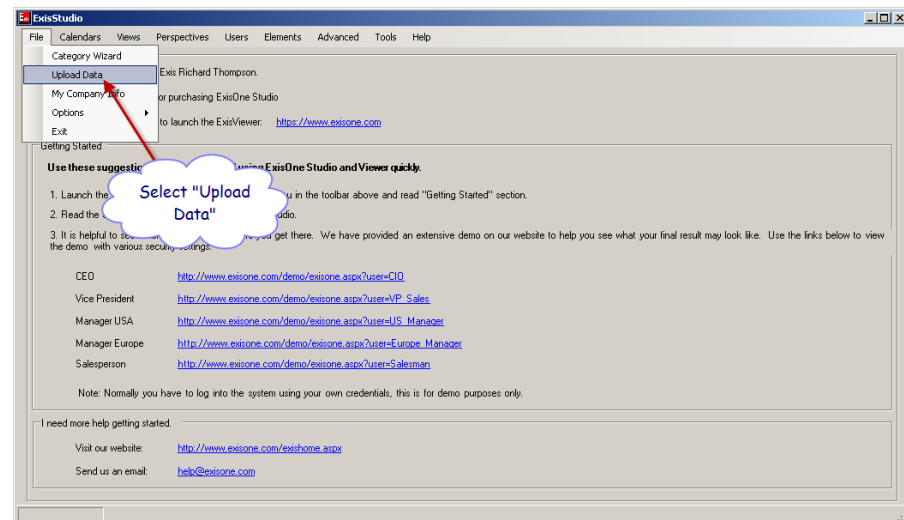


UPLOAD DATA

“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.

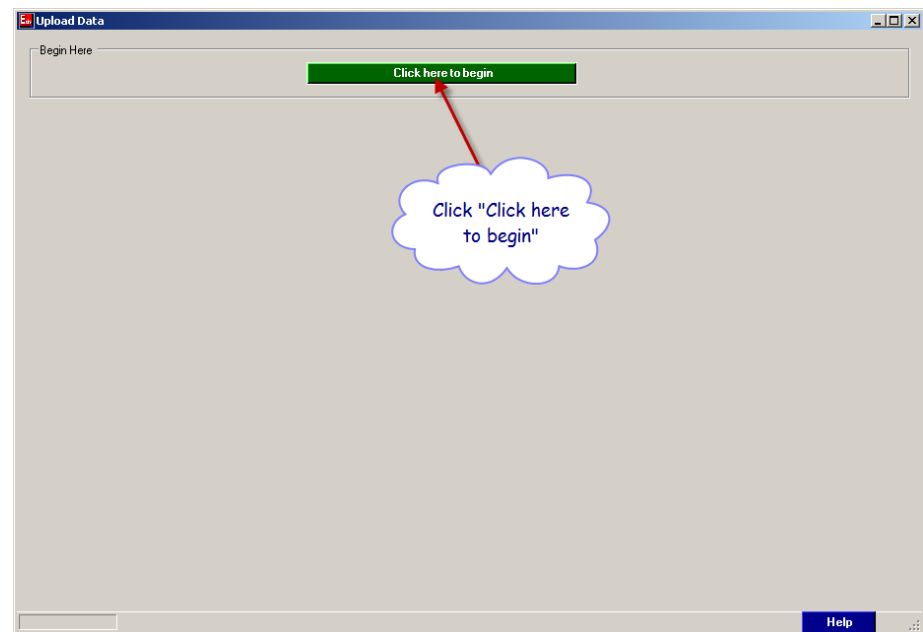
Select “Upload Data” from “File” menu.



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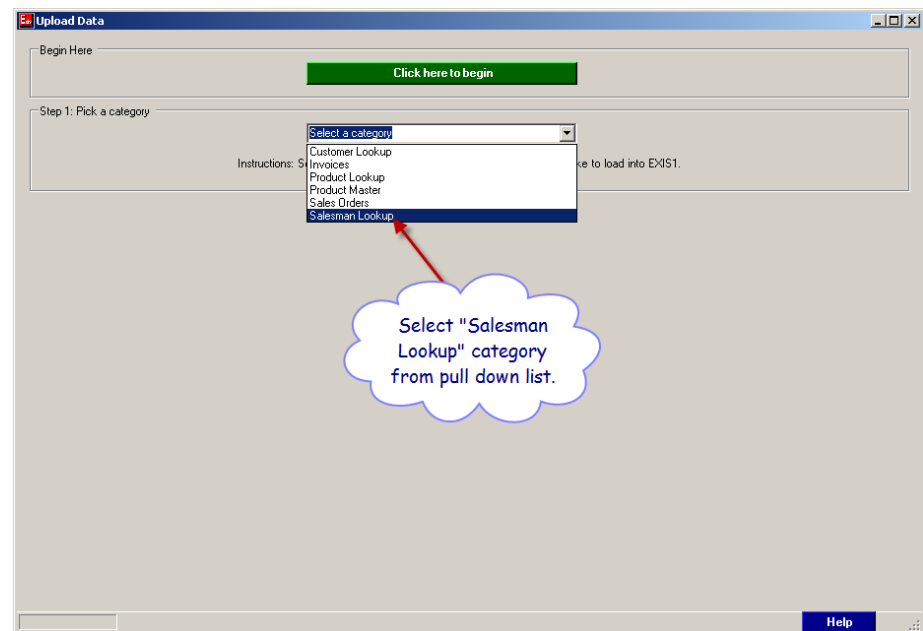


Click “Click here to begin” button.





Select "Salesman Lookup": category from drop down list.



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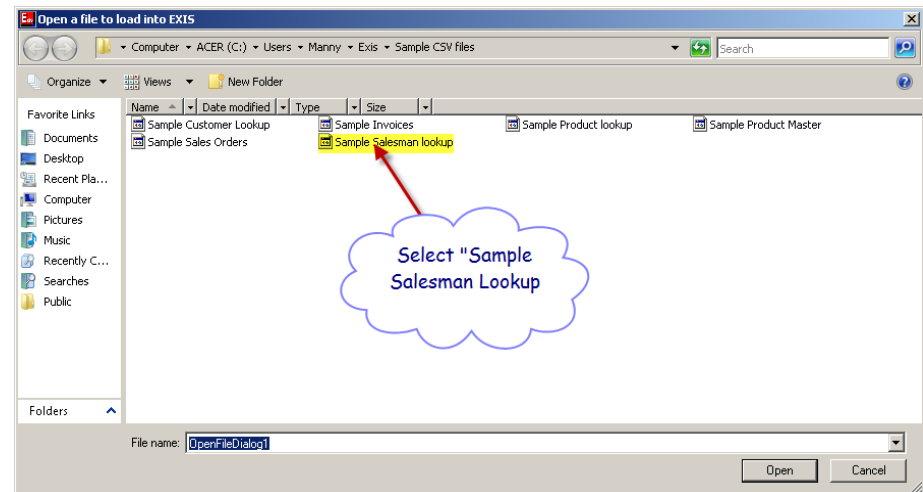
Click “Click Here to Select File” button to select the file on your computer for “Salesman Lookup” category.

A screenshot of a web application window titled "Upload Data". The window has a light gray background and a blue title bar. It contains three main sections: "Begin Here" with a green "Click here to begin" button; "Step 1: Pick a category" with a dropdown menu showing "Salesman Lookup" and instructions to select a category; and "Step 2: Select a flat file" with a blue "Click Here To Select File" button and instructions to click the button to select a file. A red arrow points from a white callout bubble with the text "Click 'Click Here to Select File'" to the blue button. A "Help" button is located in the bottom right corner.

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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.

The screenshot shows the 'Upload Data' application window. It has a title bar with 'E Upload Data'. The main area is divided into three steps. Step 1: 'Pick a category' with a dropdown menu showing 'Salesman Lookup' and instructions to select a category. Step 2: 'Select a flat file' with a button 'Click Here To Select File' and instructions to select a delimited file. Step 3: 'Check for errors and load file.' with a file path 'C:\Users\Manny\Exis\Sample CSV files\Sample Salesman lookup.csv'. Below the file path are two buttons: 'Check for errors only.' and 'Check for errors and load.'. A red arrow points from a cloud-shaped callout 'Click "Check for errors and load"' to the 'Check for errors and load.' button. To the right of the buttons are two checkboxes: 'Skip First Record' (checked) and 'Ignore Extra Columns' (unchecked). A green arrow points from a rectangular callout 'To indicate that the first record of the file is column titles and not data.' to the 'Skip First Record' checkbox. A 'Help' button is in the bottom right corner.

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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.



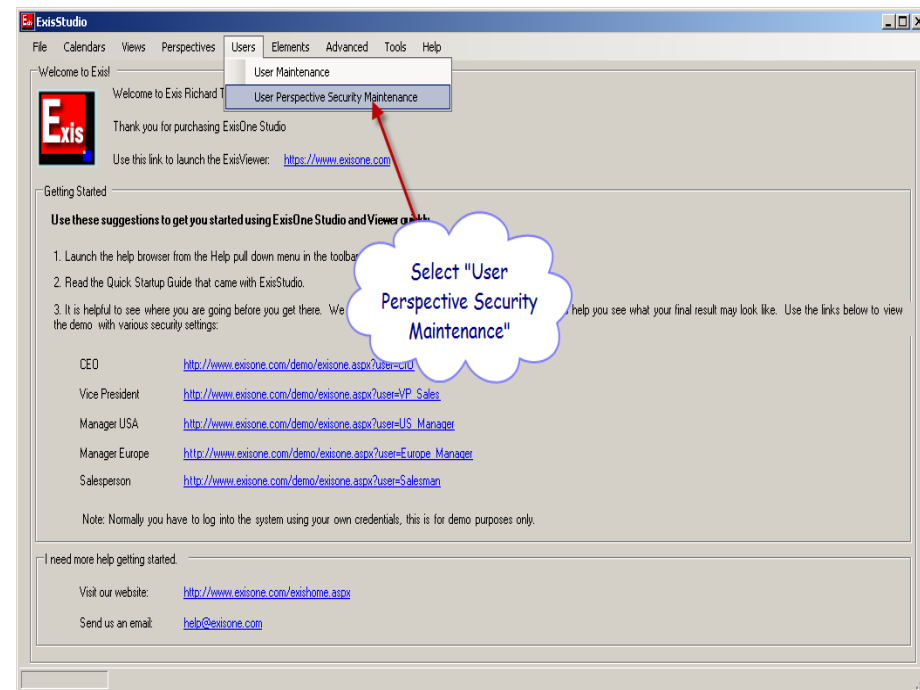
DEFINE USER SECURITY

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.

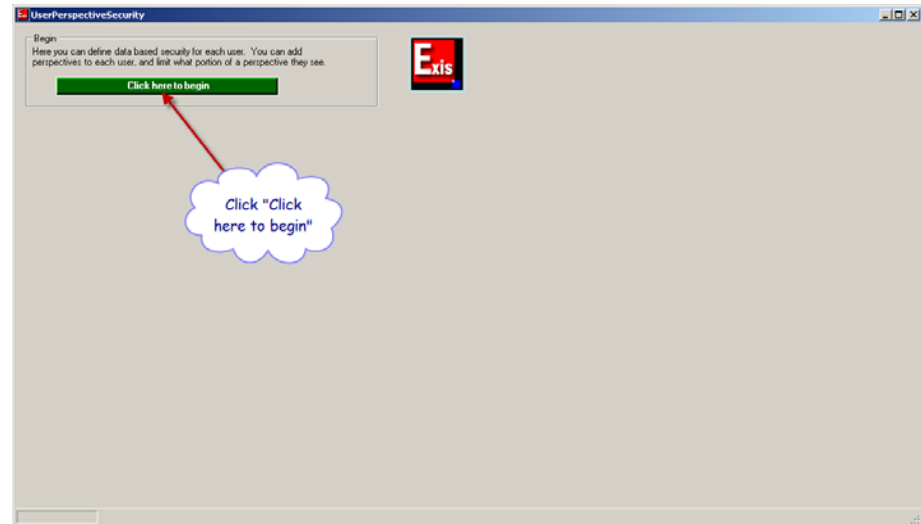
Select "User Perspective Security Maintenance" from "Users" menu.



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Click “Click here to begin”.

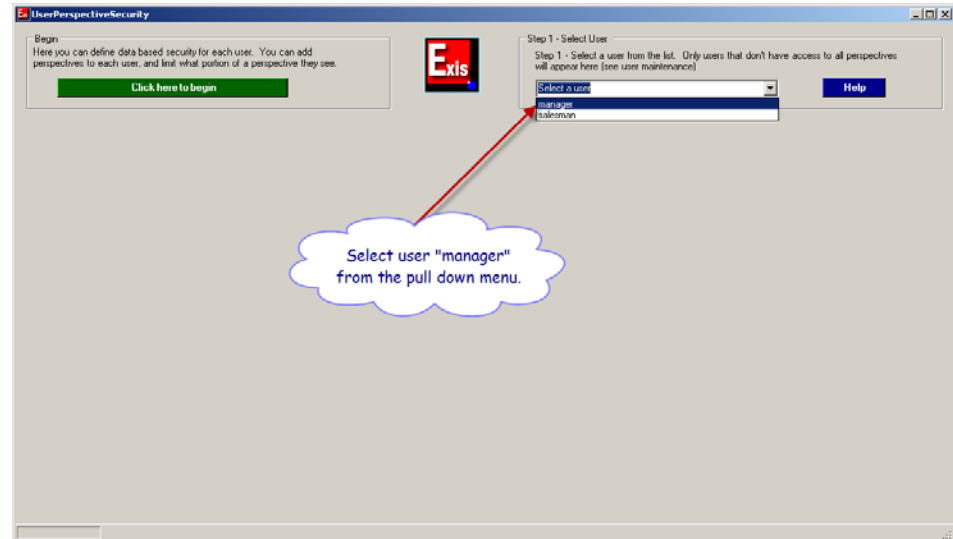


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Note that user “CEO” is not in the drop down menu. This is because “CEO” is allowed unrestricted access to all perspectives.

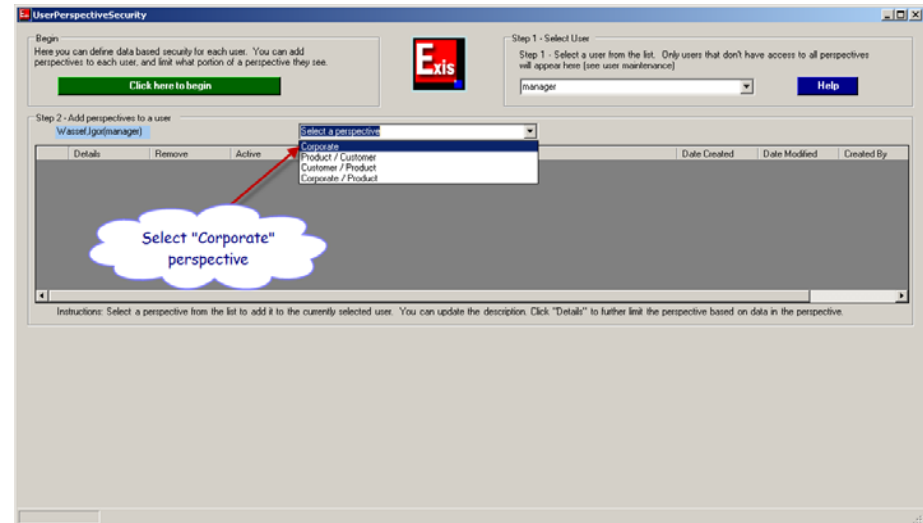
Select user “manager” from the drop down menu.



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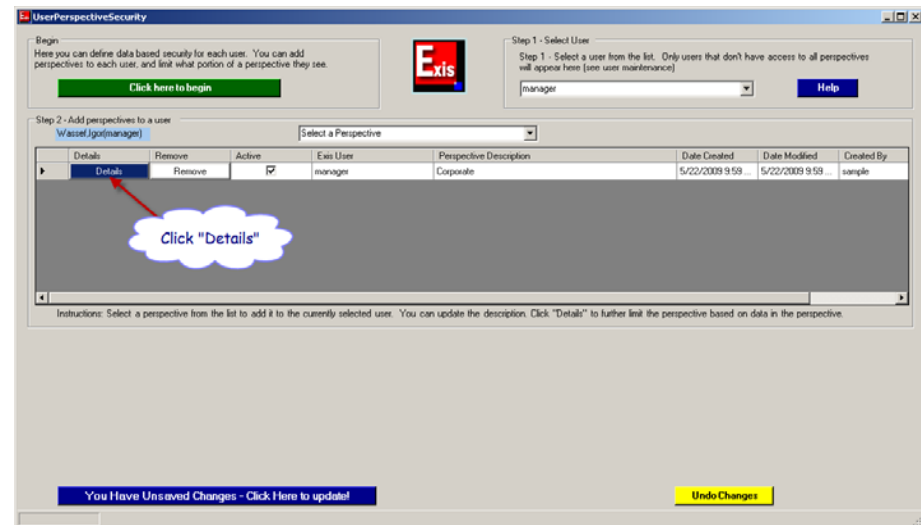
Add “Corporate” perspective for “manager”.



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Click “Details” to specify restrictions.





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”.

The screenshot shows the 'UserPerspectiveSecurity' application window. It has a title bar with the Exis logo. The main area is divided into three steps:

- Step 1 - Select User:** A dropdown menu shows 'manager' and a 'Help' button.
- Step 2 - Add perspectives to a user:** A table with columns: Details, Remove, Active, Exis User, Perspective Description, Date Created, Date Modified, Created By. The first row shows 'Details' (with a 'Details' button), 'Remove', 'Active' (checked), 'manager', 'Corporate', '5/22/2008 9:32', '5/22/2008 10:48', and 'sample'. Below the table is a dropdown menu with 'CEO' selected. A red arrow points from a cloud labeled 'Click "CEO"' to this dropdown.
- Step 3 - Set up data based security for perspective:** A table with columns: Sales VP, Area Mgr., Territory ID. The first row shows 'ALL', 'ALL', 'ALL'. Below this is a dropdown menu with 'Dubover, Christopher' selected. A red arrow points from a cloud labeled 'Select "Dubover, Christopher"' to this dropdown. To the right is a button labeled 'Lock Down This column for the user to this value'. A red arrow points from a cloud labeled 'Click "Lock Down ..."' to this button. At the bottom, there is a button 'You Have Unsaved Changes - Click Here to update!' and a button 'Undo Changes'.

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Click “You Have Unsaved Changes – Click Here to Update” button.

UserPerspectiveSecurity

Begin
Here you can define data based security for each user. You can add perspectives to each user, and limit what portion of a perspective they see.
[Click here to begin](#)

Step 1 - Select User
Step 1 - Select a user from the list. Only users that don't have access to all perspectives will appear here [see user maintenance]
manager [Help](#)

Step 2 - Add perspectives to a user
Wassel,Igor(manager) [Select a Perspective](#)

Details	Remove	Active	Exis User	Perspective Description	Date Created	Date Modified	Created By
Details	Remove	<input checked="" type="checkbox"/>	manager	Corporate	5/22/2009 9:32 ...	5/22/2009 10:58 ...	sample

Instructions: Select a perspective from the list to add it to the currently selected user. You can update the description. Click "Details" to further limit the perspective based on data in the perspective.

Step 3 - Set up data based security for perspective

CEO	Sales VP	Area Mgr.	Territory ID	Salesman ID	Customer ID
LOCKED	LOCKED	LOCKED	ALL	ALL	ALL
Dubover, Christopher	Tireea, Richard	Wassel, Igor			

Instructions: Click on the column heading to update security for the perspective level. You must go left to right in order. The last column can not be locked.

[You Have Unsaved Changes - Click Here to update!](#) [Undo Changes](#)



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

User	Perspective	Element	Data
manager	Product / Customer	Product	All
		Product ID	All
		Customer ID	All
	Customer / Product	Parent Company	All
		Customer ID	All
		Product ID	All
	Corporate / Product	CEO	Dubover, Christopher
		Sales VP	Tintea, Richard
		Area Mgr.	Wassef, Igor
		Product	All
		Product ID	All
salesman	Corporate	CEO	Dubover, Christopher
		Sales VP	Tintea, Richard
		Area Mgr.	Wassef, Igor
		Territory ID	Stillman, Howard
		Salesman ID	All
		Customer ID	All

Exis LLC
77 Old Brookside Road
Randolph, NJ 07869
Tel: (973) 933-2423
Email: info@exisone.com



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

Exis LLC
77 Old Brookside Road
Randolph, NJ 07869
USA

Email: info@exisone.com
Tel: +1 (973) 933-2423

Index

4/4/5

5/4/4, iii, 6, 10, 15, 16, 31, 33, 42, 104, 114

Allocated, iv, 2, 87, 92

Allocation, 72, 90, 92

Alphanumeric

Characters, 26, 32, 47, 48, 59

Calculated, iv, 62, 72, 83

Calendar, iv, 3, 15

Category, 2, 32, 58, 61, 135

Column, 26, 32, 41, 47, 48, 49, 50, 59, 117

Comma Separated Values

CSV

Delimited, 14, 129

Company, Organizasion, 13, 14, 104, 143

Data, iv, v, 5, 6, 43, 129, 143

Date, 2, 4, 39, 50, 51, 59, 72

Delete, 22, 58

Description, 108

Details, 100, 108, 140

Display, 116

Element, v, 2, 3, 9, 26, 32, 39, 41, 50, 59, 65, 70, 78, 82, 93, 96, 116, 117, 143

Excel, ii, 7

Exis, i, 2, 5, 10, 11, 13, 14, 22, 128, 144

ExisOne, i, ii, iii, 1, 2, 5, 9, 13, 14, 15, 16, 17, 23, 26, 42, 43, 49, 51, 58, 62, 70, 87, 97, 104, 135, 144

ExisServer, 18, 79, 129, 134

ExisViewer, 2, 4, 6, 7, 73, 80, 118, 121, 122, 124

Files, iv, 3, 34

Fiscal

Period

Month

Year, iv, 3, 15

Id, 50, 59, 78, 121, 122

JPEG, 124

KPI

Performance Measurement, 114, 115

KPM

Performance Measurement, 3, 6, 114, 115

Level, 121, 122

- Line
 - Chart
 - Graph, 48, 59, 60
- Lock
 - Security, 141
- Log, 135
- Logo, v, 124, 127
- Maintenance, v, 9, 93, 96, 97, 105, 118, 136
- Multiplier, 116, 117
- Name, 26, 32, 41, 50, 59, 76, 77, 78, 86, 101, 121, 122
- Numeric, 41, 50, 59
- Password, 121, 122
- Performance
 - KPI
 - KPM, 3, 6, 114
- Period
 - Fiscal
 - Month, 3
- Perspective, v, 3, 97, 99, 104, 121, 122, 136, 143

- QTD
 - Quarter-to-Date, 4, 6, 50, 51, 59, 110
- Quarter
 - QTD
 - Quarter-to-Date, 4, 51, 72
- Related, iv, 4, 73, 79
- Rounding, 116
- Secure, 7
- Security, v, 96, 121, 122, 136
- Status, 117
- Transaction Date, 4, 50, 59
- Transactions, 5
- Upload, v, 9, 124, 128, 129, 135
- User, i, v, 6, 7, 118, 121, 122, 136, 143
- View, 6, 7, 105, 116, 117, 121, 122
- Viewer, 124, 135
- Year, 3, 4, 51, 72
- YTD, 4, 6, 50, 51, 59, 110