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First Time Tutorial

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<tr><td>Description</td><td>This tutorial is intended to be an introduction to process design within the SolveXia system.</td></tr>
<tr><td>Pre-requisites</td><td>Prior to starting this tutorial, please ensure that: Your PC has the following installed: Internet browser. Either:
✓ Firefox;
✓ or Google Chrome;
✓ or Safari
✓ Microsoft Excel
You have a user name and password to the SolveXia system:
✓ Please contact your SolveXia representative or email support@solvexia.com if you do not have your login information.
You have saved the tutorial files to your local PC:
✓ Please contact your SolveXia representative or email support@solvexia.com if you do not have the tutorial files</td></tr>
<tr><td>Duration</td><td>About 1 hour</td></tr>
<tr><td>Core competencies</td><td>Upon completing this tutorial, users will be able to:
✓ Create a new process
✓ Create a new step group
✓ Add a data step
✓ Add properties for a data step
✓ Add an action step for the following functions:
    ✓ Manipulate data in a single file or multiple files
    ✓ Send an automated email
    ✓ Add instructions for each action step
    ✓ Maintain dependencies for each step in the process
    ✓ Change the order of steps
    ✓ Run a step Run a process</td></tr>
<tr><td>Target audience</td><td>SolveXia users responsible for creating and maintaining processes within the system</td></tr>
</table>

Case study

Training Co Ltd currently has three different accounting systems due to previous acquisitions. Each accounting system records accounts due from clients in 3 regions, Europe, Asia & North America.

Training Co would like to create a process that allows:

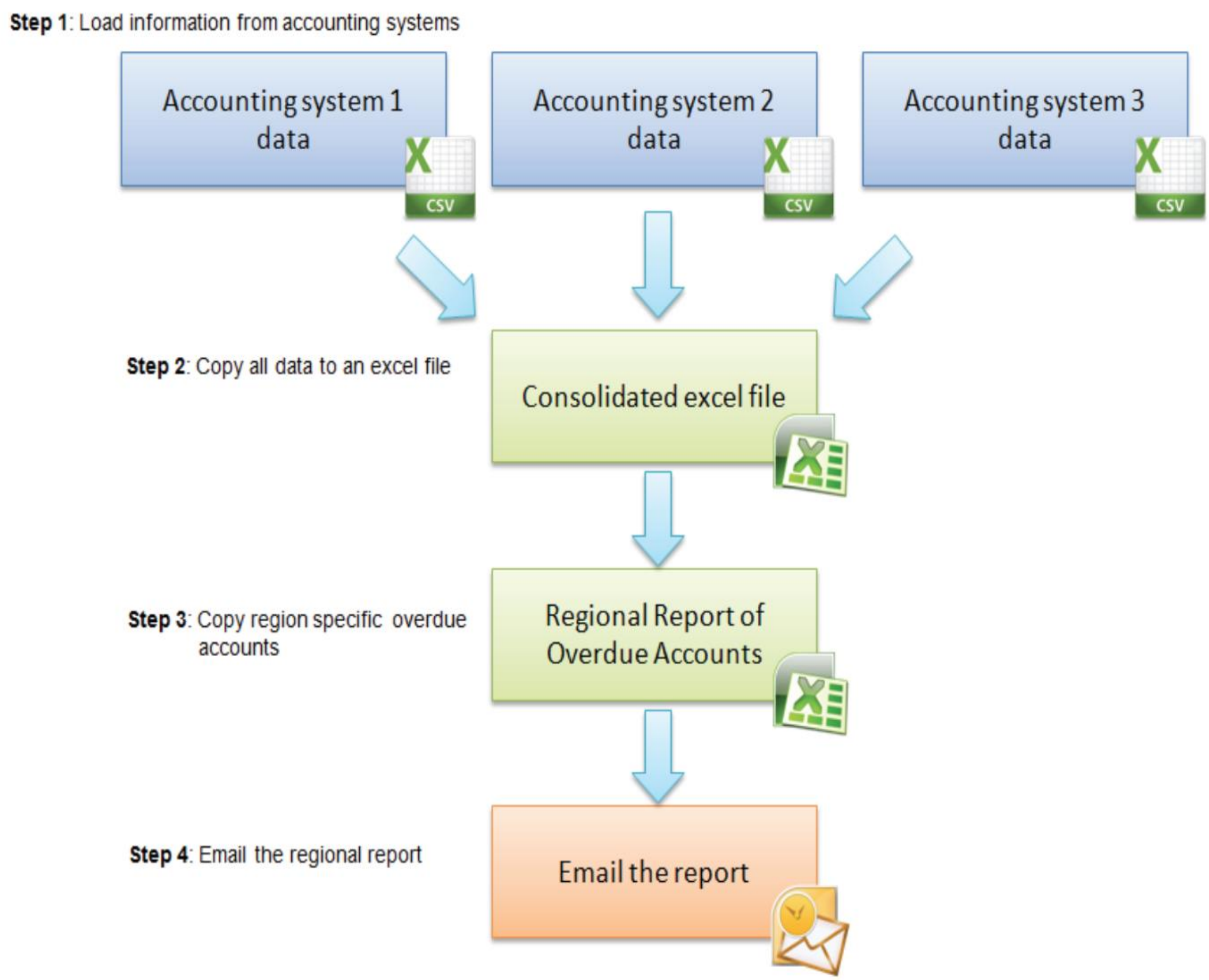
- the user to upload the accounting system data,
- select a region and send a "regional report" via email containing accounts that are overdue (i.e. active for greater than 45 days).

Solution

Create the following process in the SolveXia system:

Steps
1. Load an extract of debtors from each accounting system (in comma-delimited format).
2. Copy each extract of debtors from comma-delimited format into an Excel template.
3. Selectively copy the name, region, amount and days overdue to a new file for the desired region if the days overdue > 45.
4. Send an email with the file for each region to the relevant regional manager.

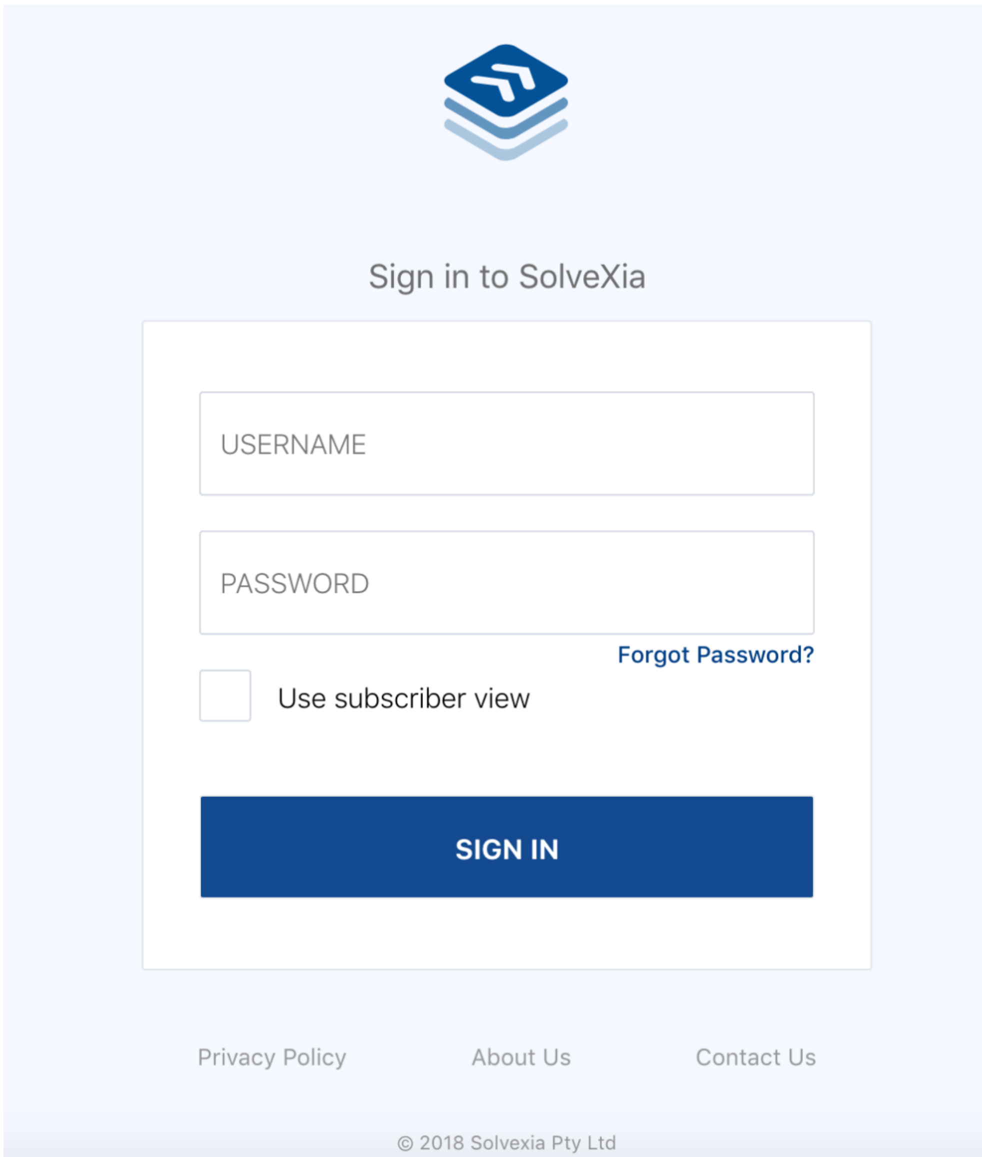
Illustration of steps in a process



Tutorial 1: Starting up your first process

A - Login to the system

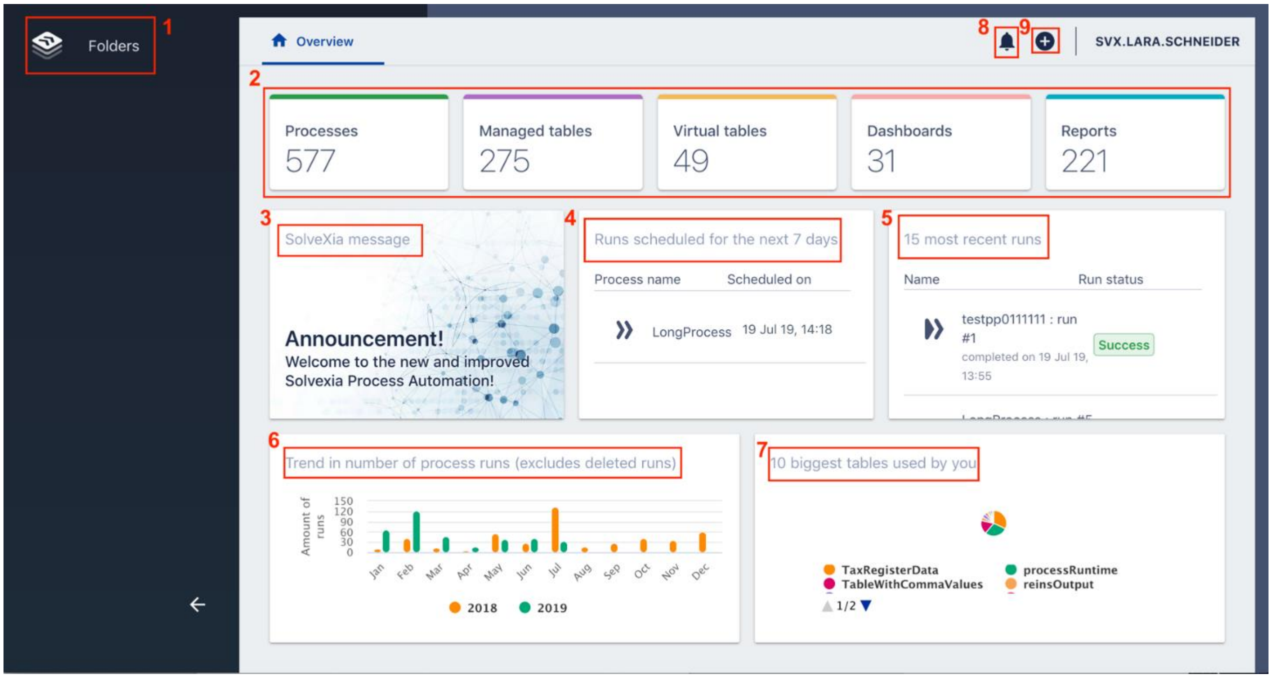
Launch your internet browser and go to https://au.solvexia.com



- ✓ Enter your username and password and click **"SIGN IN"**.

> If you do not have your login information, please contact your SolveXia representative or email support@solvexia.com

A.1 – Screen layout

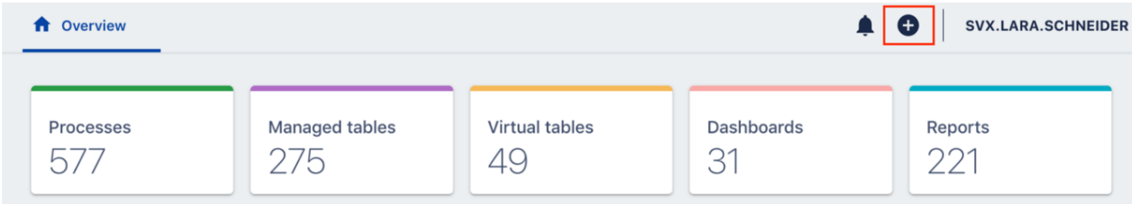


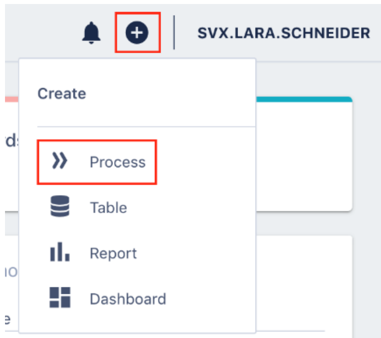
1. Folders; these hold your Processes, Managed Tables and Reports.
2. Ribbon bar with the number of Processes, Managed Tables, Virtual Tables, Dashboards and Reports in your environment.
3. Messages and updates from SolveXia.
4. Name, date and time of scheduled runs for the next seven days.
5. List of your 15 most recent runs.
6. The number of process-runs done in the current year and previous year.
7. List of the 10 biggest tables you currently use.
8. Notifications
9. Create a new Process, Table, Report or Dashboard.

B – Create a new process

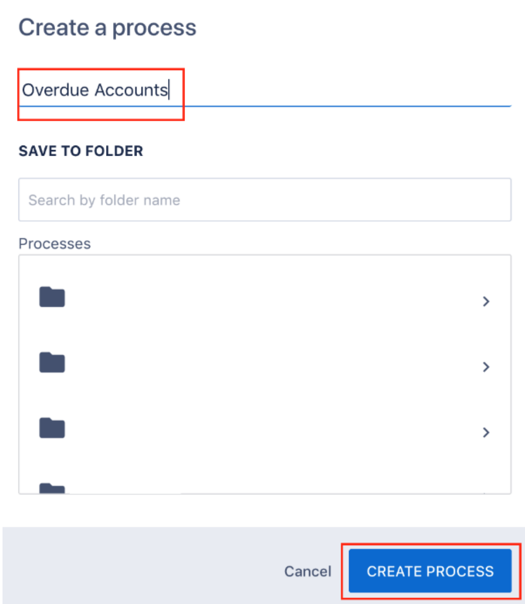
A **Process** in SolveXia is created to perform a repetitive task that would otherwise be completed manually using Excel spreadsheets, Text files and Access databases. Examples of a **Process** include the creation of weekly or monthly reports such as management, regulatory or sales reports.

To create a new process, click on the **"+"** symbol **(Create)** at the top right of the overview screen, and click on **Process**.





Enter the process name: Overdue accounts and click **Create Process**.

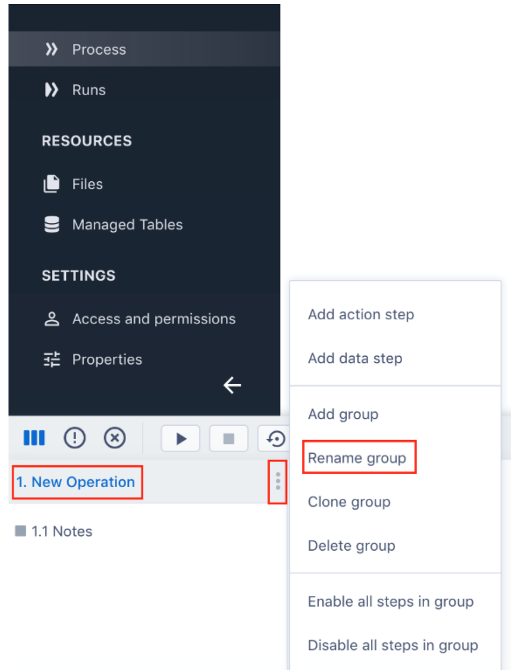


The process will be created and opened. You can view any process you have created in the process list on the left-hand side. This is by clicking on **Processes** and clicking on the process' name.

C – Step groups

Step groups organise the steps in your process into logical sections so that the process is easy to read and interpret: The process will begin with a new step group (initially named **New Operation**).

To rename the group, click on the 3 dots next to the group name and select **Rename Group**. Rename the group to **Upload data files**.



D – Data steps

Your process is made up of individual steps that are performed in a particular order necessary to achieve a given outcome, such as the creation of a report. In SolveXia, steps are added to a process for the purpose of allowing a user to input data (such as files, dates, text etc.) and running "instructions" that perform automated tasks such as the manipulation of data or sending of an email. When building your process, it is important to use the correct type of step for each task:

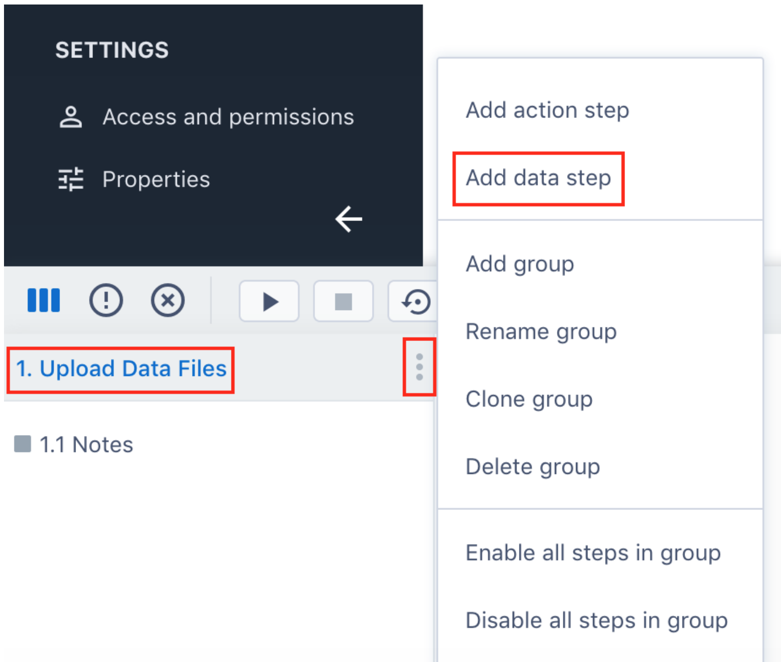
Step type	Description
Data steps	Used to input data into the process
Action steps	Used to manipulate files, copy data and send communications

D.1 – Adding data steps

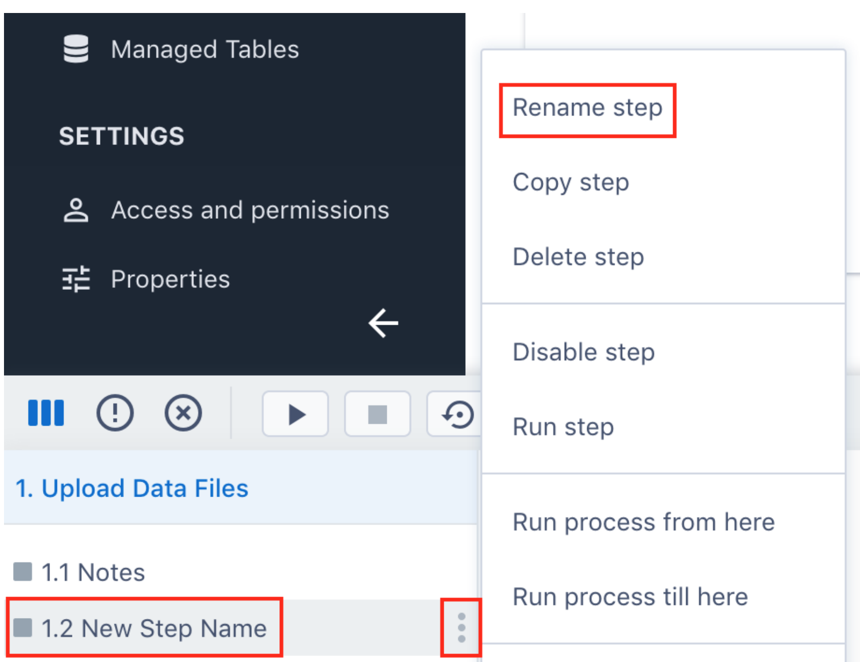
Quite often, a process will use various types of data including files (such as Excel, Text or Access) and dynamic information provided by the user such as a date, some text or a number. For the purpose of the tutorial, we would like to upload the following data files:

- three CSV files containing source data from each of the three accounting systems.
- an Excel file to store the consolidated accounting system data
- a "regional report" Excel file for the purpose of extracting data for a selected region.

To add a new data step, click on the 3 dots next to the step group name and click on **Add data step:**

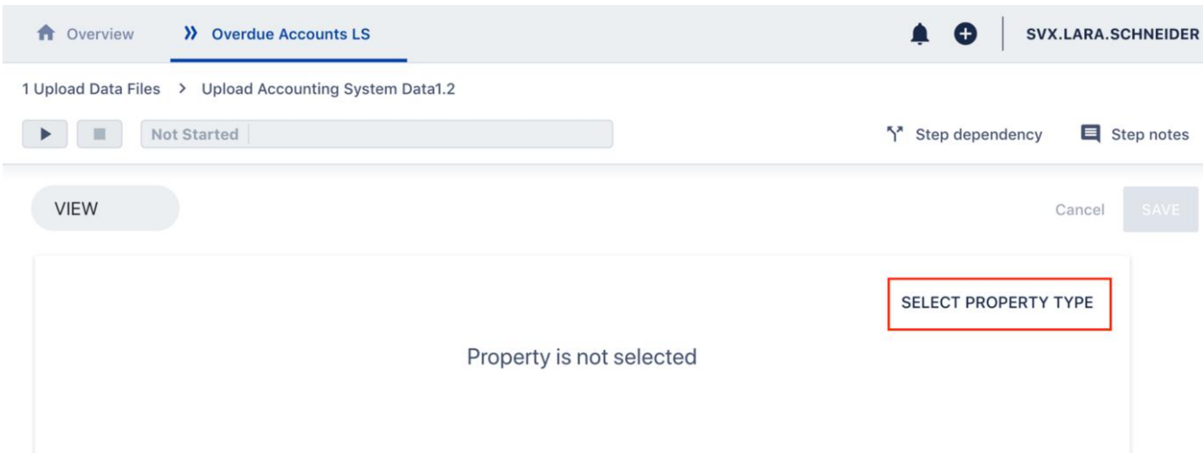


In the new step, click on the three dots and select **Rename data step**. Please change the name to **Upload Accounting System Data**.

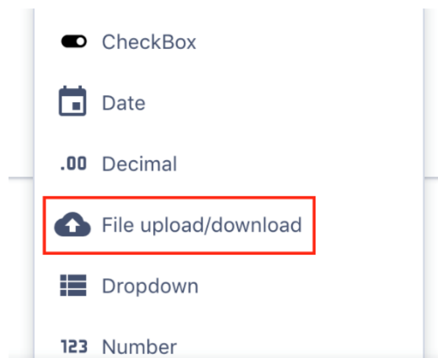


D.1.1 – Adding data properties

A property represents an input or output for your process, such as a file, text or a date. When editing a data step, click on **Select Property Type** and a dropdown menu will appear.

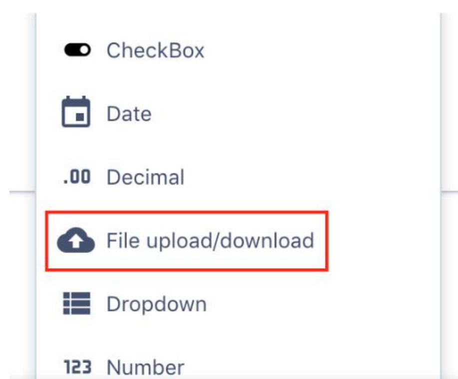


The dropdown menu contains all of the various types of inputs/outputs that you can add to your data step. To add a property, click on a data property type from the list.

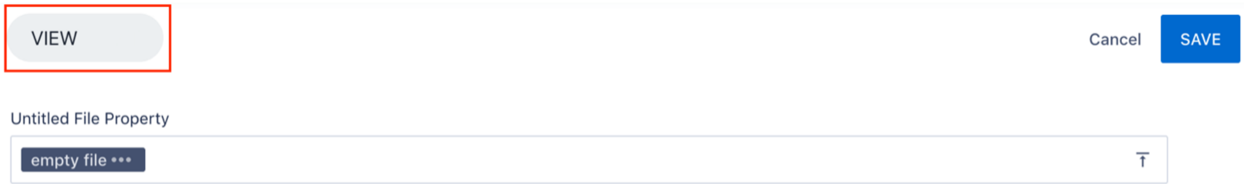


D.1.1.1 – Adding data properties

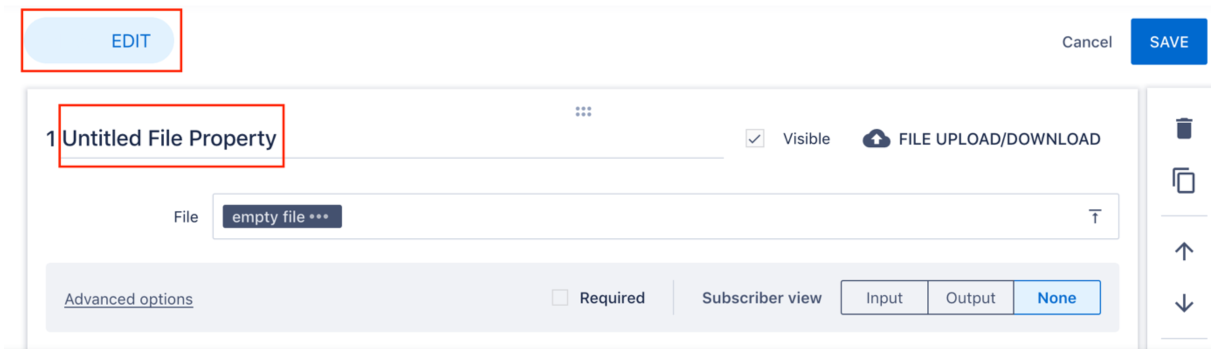
Add the F**ile upload/download** property by clicking on it from the **Select Property Type** dropdown menu.



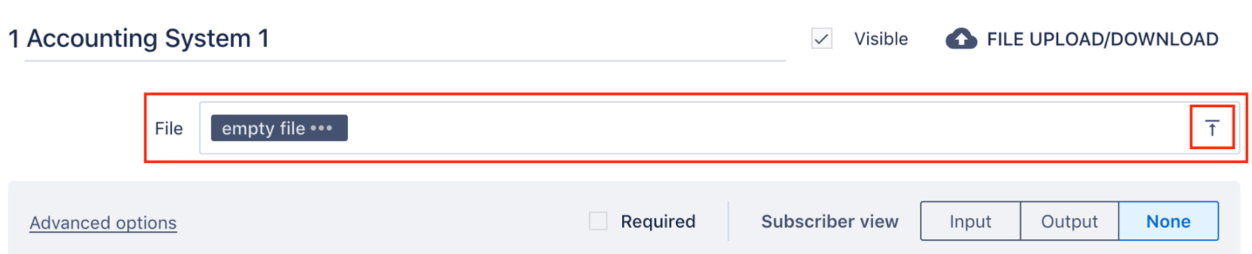
Click on **View** to edit the step properties. (**Edit** should appear instead of **View** when in editing mode).



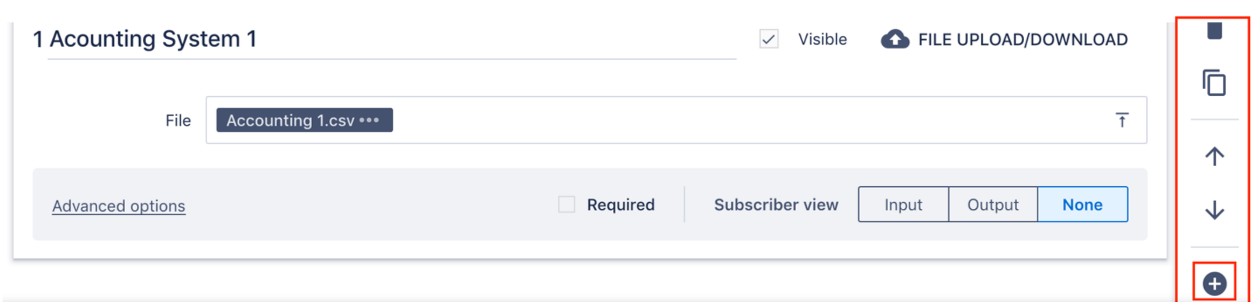
Enter **Accounting System 1** in the **Untitled File Property** field:



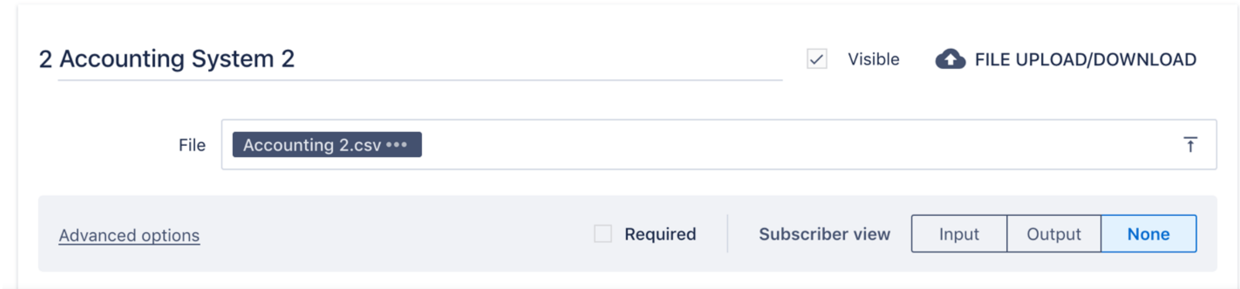
To upload a file to the step, click on the upload arrow in the **File** field. Here, select **Accounting 1.csv**.

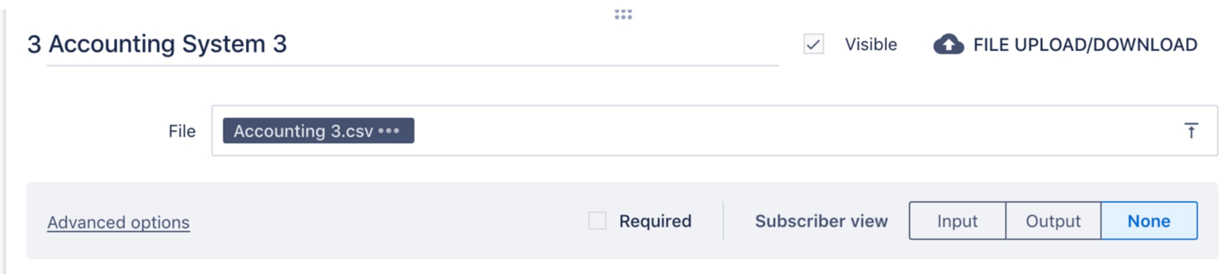


To add another **file upload/download** to a data step, click on the **"+"** on the sidebar on the right-hand side.

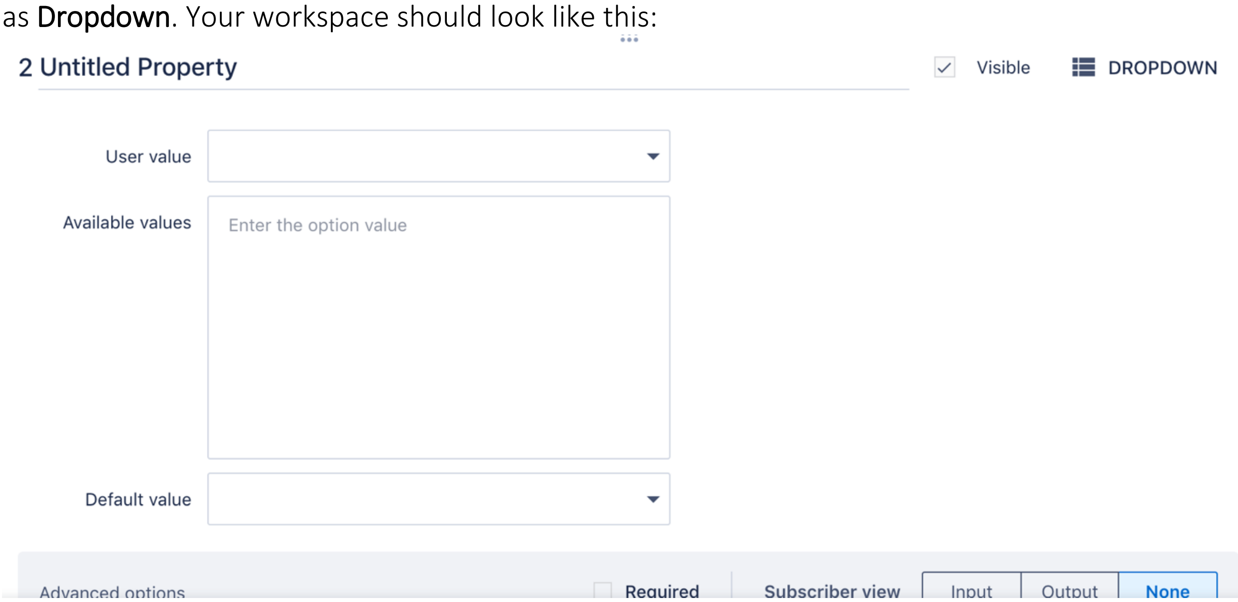


Follow the same steps of uploading **Accounting System 1** to by creating 2 more **file upload/download** named **Accounting System 2** and **Accounting System 3** to the data step **Upload account system**. Attach **Accounting 2.csv** and **Accounting 3.csv,** respectively.



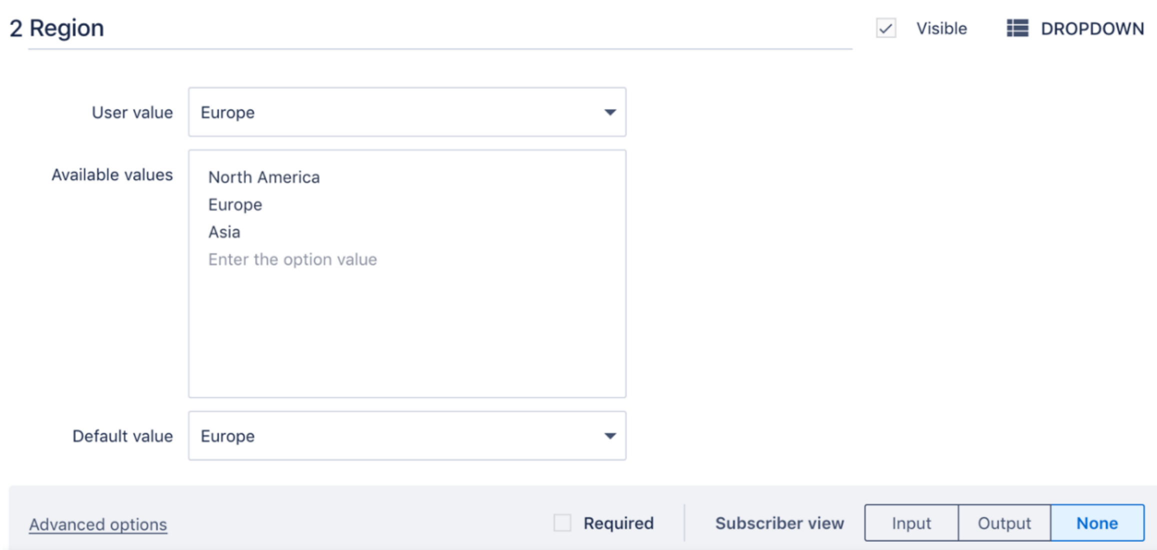


Add another **Property Type** by clicking on the **+** on the right-hand side. Select the **Property Type** as **Dropdown**. Your workspace should look like this:

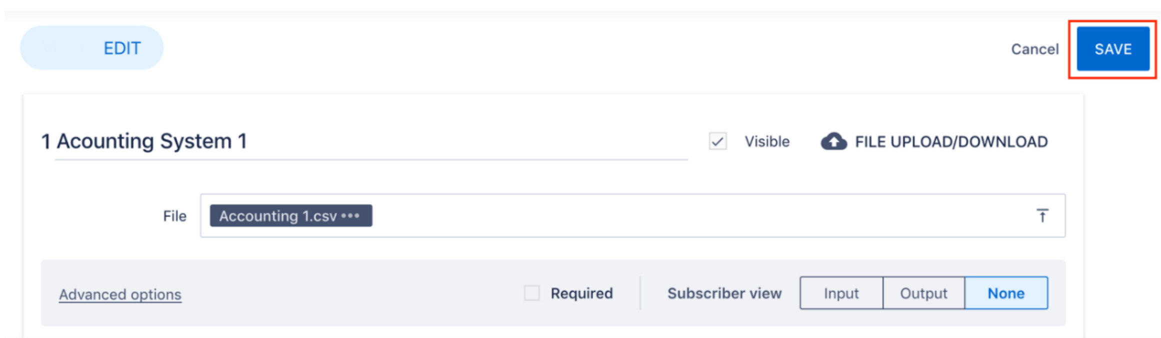


Rename the property as **Region** and in the **Available Values** field type in **North America**, **Europe** and **Asia**.

Select the **User Value** and **Default Value** as **Europe**.



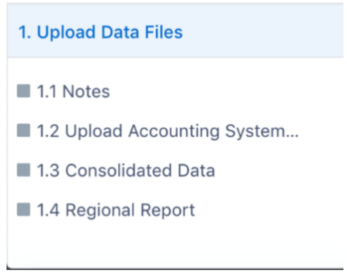
Once completed, click the **Save** button located at the top right-hand side of the workspace:



Using the same procedure outlined above, add two more data steps (and their properties) to the **Upload data files** group as follows:

Data Step	Property		
Step Names	Type	Name	Upload
Consolidated data	File upload/download	Consolidated data file	Consolidated.xls
Regional report	File upload/download	Regional report file	Regional report.xls

The Data files group should now include four steps (including the default **Notes** step):



Each step is automatically assigned a number indicating its position in the overall process; for example, *1.4 Regional Report* indicates that it is the fourth step in the first step group.

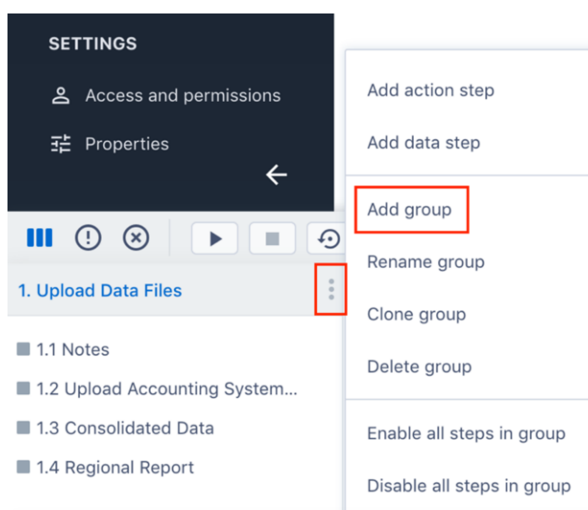
D.2 – Adding action steps

Actions steps automate a task that is carried out in order to complete your process. This can include:

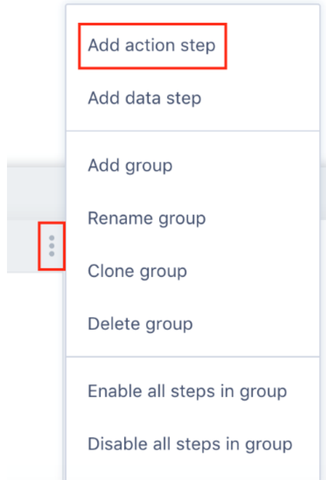
Property	Description
Manipulating data	Manipulate data contained in the data files uploaded to the process
Communications	Send emails and SMS messages
Third-party tools	Run a third-party applications/executable files (.exe)
Editors and viewers	Display text/notes
Decision controls	Establish whether a certain set of criteria have been met

In this tutorial, we will be using action steps to manipulate data and to send a report via email at the end of the process.

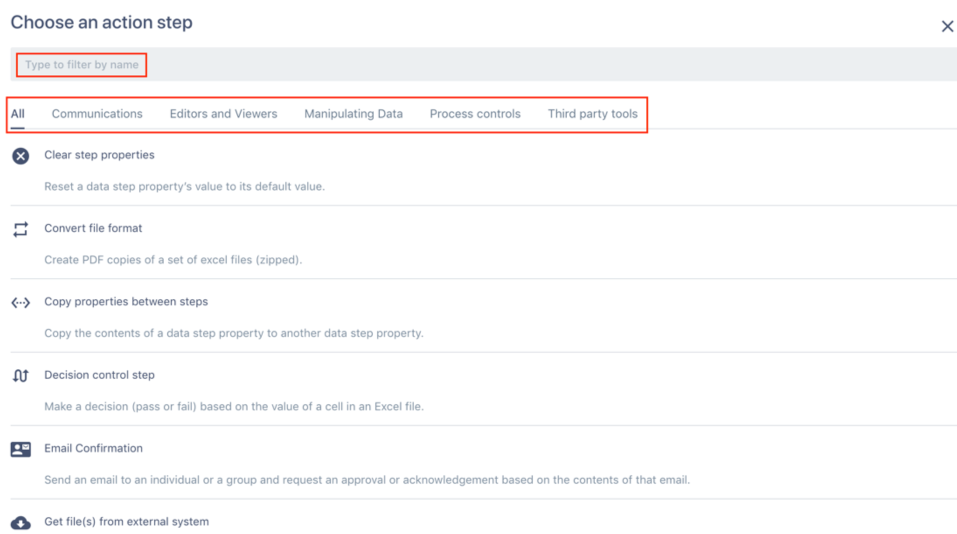
Add a new step group called **Generate accounts by region** by clicking on the three dots next to Group 1 (*Upload data files)*, click on **Add group** and rename it**.**



Then click the three dots next to the second group, and select **Add action step**:



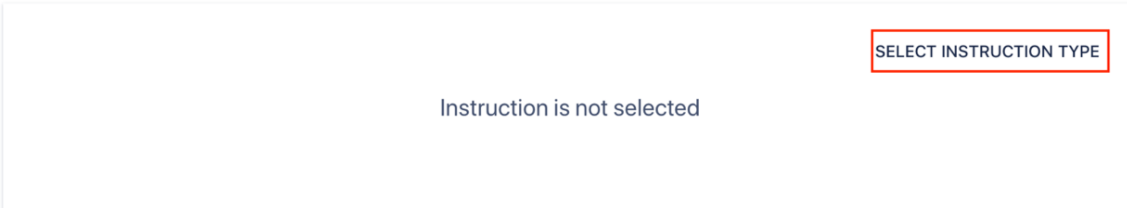
When adding a new action step, you must first choose the type of action that the step will perform. A pop-up will appear where you can either type to filter by name or find it under the different tabs.



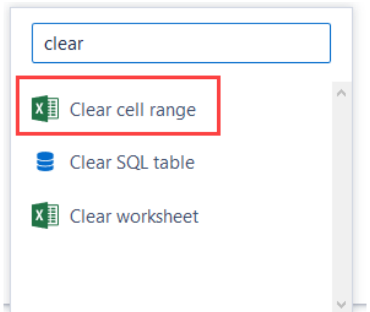
For this tutorial, please click on **Manipulating Data** in the banner and then click on **Manipulate Data**. An error message will appear reminding you that you must configure this step before running your process.

To allow the process to be run repeatedly, it is necessary to clear any existing data contained in the consolidated workbook and the regional report.

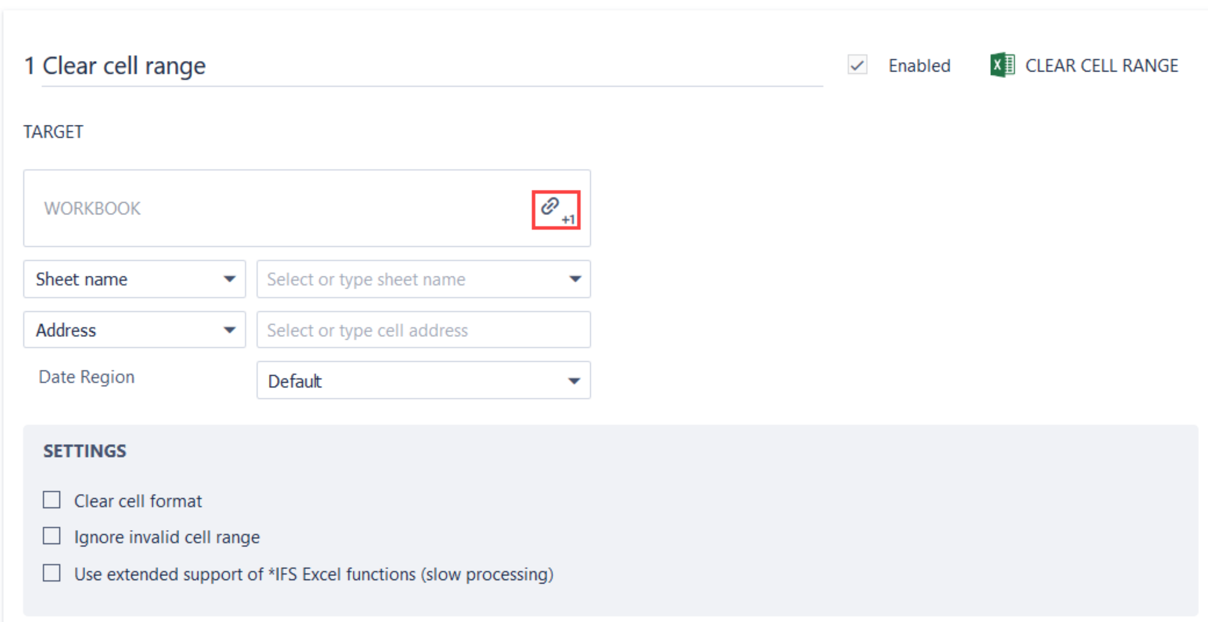
First, rename the step to **Clear Existing Data** by clicking on the three dots next to the action step. Then, in the new workspace, add an instruction to your action step, to add an instruction click on **Select Instruction Type**.



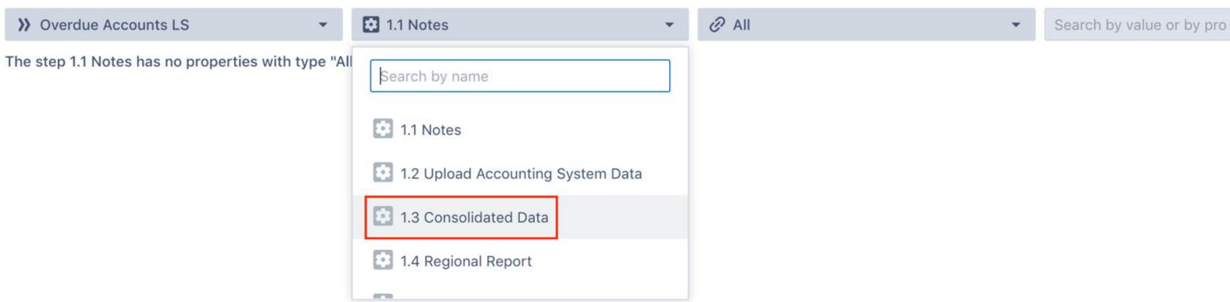
Now you can search for the instruction by name or scroll down through the drop-down menu. For the case of the tutorial, please select **Clear Cell Range**.



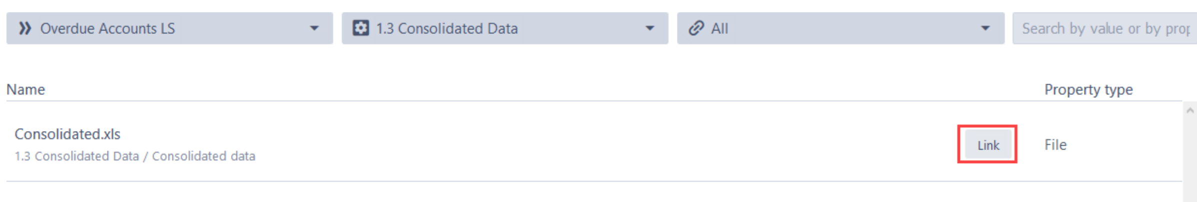
We can see that the instruction requires a target file. Click on the **Link** icon and a pop-up will appear.



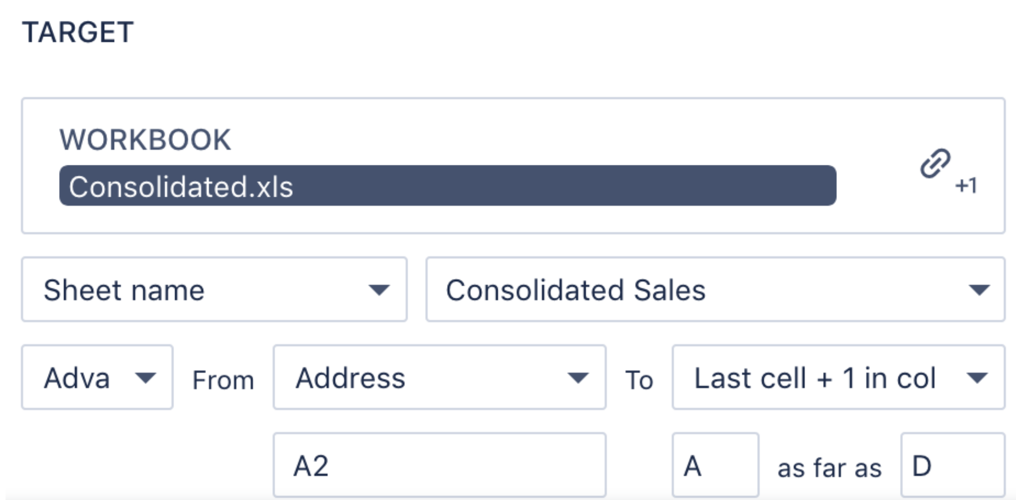
Pop-up:



Click on **1.3 Consolidated Data** under the tab **1.1 Notes**, and then link the **Consolidated.xls** by clicking on **Link**.

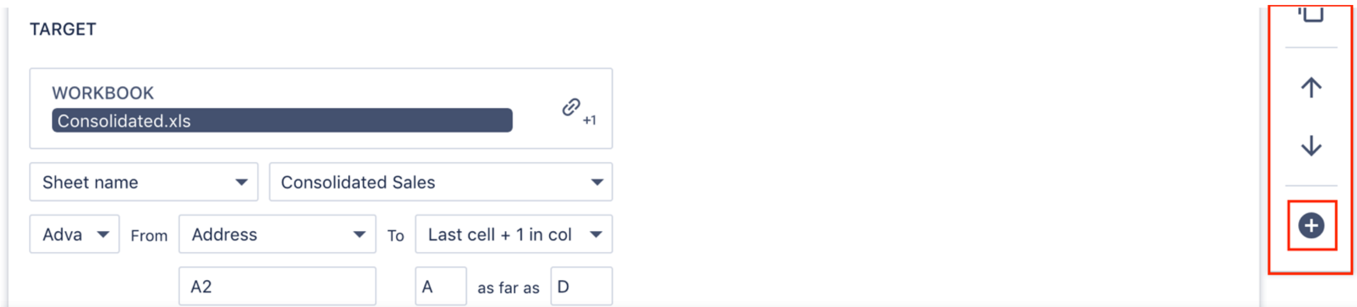


Configure the instructions by selecting **Sheet name** as **Consolidated Sales**. Select **Advanced range** and configure it as follows:

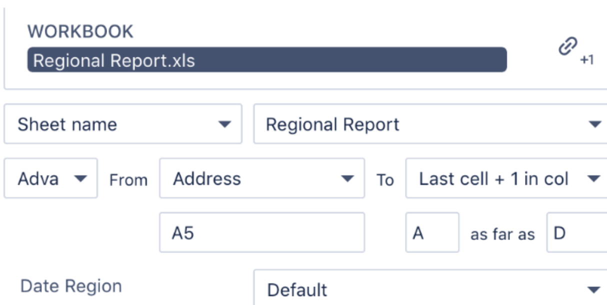


NB: Keep **Date region** as **Default** and <u>do not</u> tick any of the boxes for this step.

Repeat the process for **Regional Report** by clicking on the **"+"** on the right-hand side and select instruction type **Clear Cell Range** again.



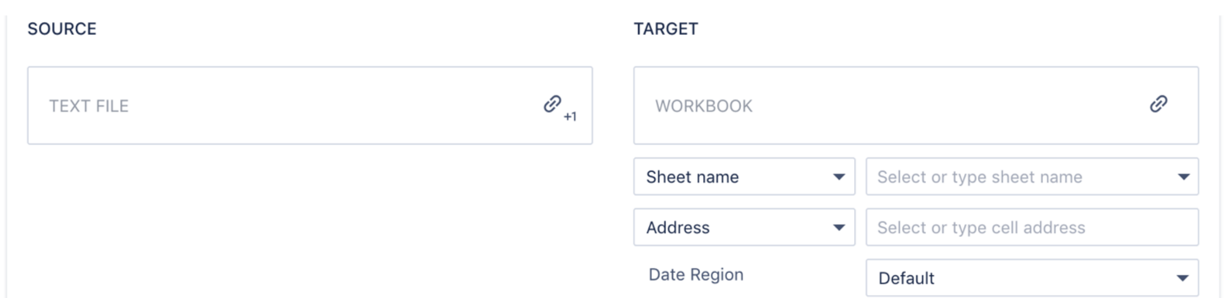
When linking, select **1.4 Regional Report** and link **Regional Report**. Configure it as follows:



D.2.1 – Copy from Text/CSV file to Excel

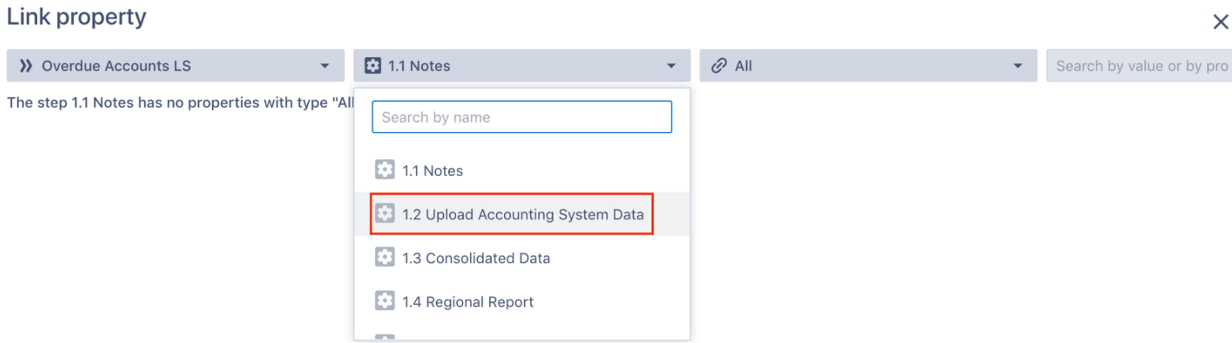
For the purpose of copying the accounting system data, add a new action step and select **Manipulating Data** in the banner and then select **Manipulate Data**.

Here you can add the instruction **Copy from Text/CSV file to Excel**. Rename the step **Import Accounting Systems to Excel**. Your workspace should look like this:

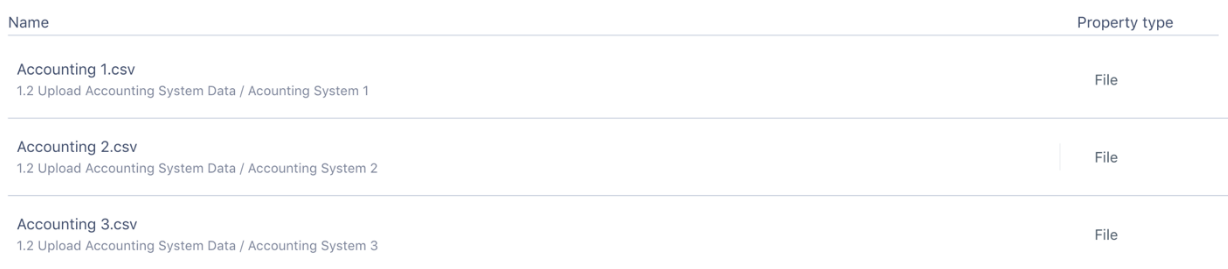


We can see that the instruction requires a source and target file. We know that the source is the accounting system data file (CSV) whilst the target is the **Consolidated.xls** file.

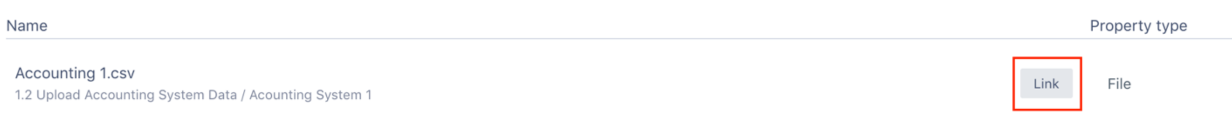
Next, to the **Text File** field, click on the link icon. A pop-up will appear, Select **1.2 Upload Accounting System Data**.



You can see Accounting 1.csv, Accounting 2.csv and Accounting 3.csv.



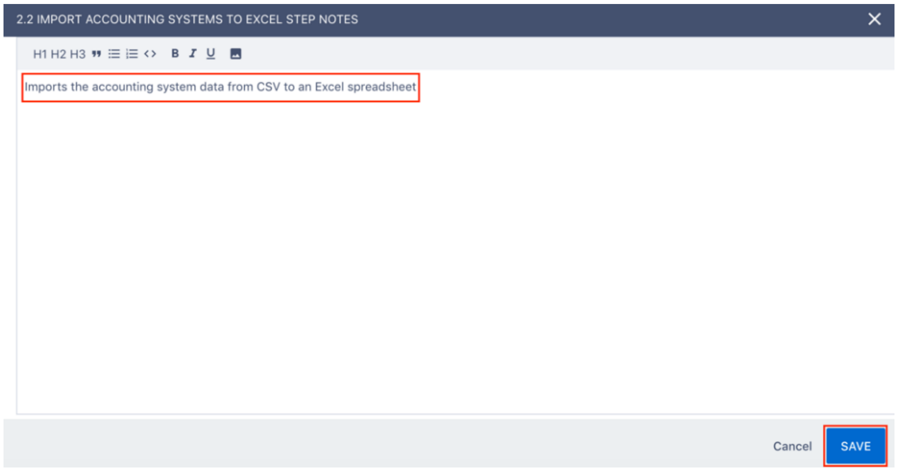
Select **Accounting 1.csv** by clicking on **Link**.



Repeat process for Target by selecting **Consolidated.xls** under **1.3 Consolidated Data**.

You can also add step notes by clicking on the **Step Notes** on the top right-hand side of the workspace.

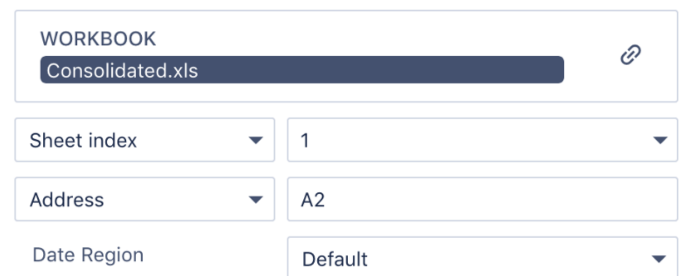
Type in the note: *Imports the accounting system data from CSV to an Excel spreadsheet,* and click **Save**.



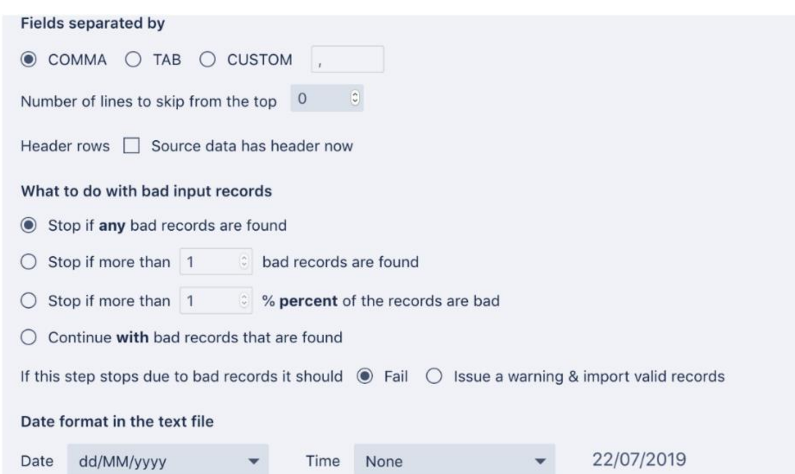
Because the target file is a spreadsheet, we must also identify the worksheet and cell range that we want to work with:

- ✓ Worksheet – Can be either the index (sheet number, starting from the left) or the specific sheet name.
- ✓ Use Cell – Can be a (single) cell address, a named range contained in the spreadsheet, or an advanced cell range which can be defined in the instruction.

For configuring this step property, copy the image below:

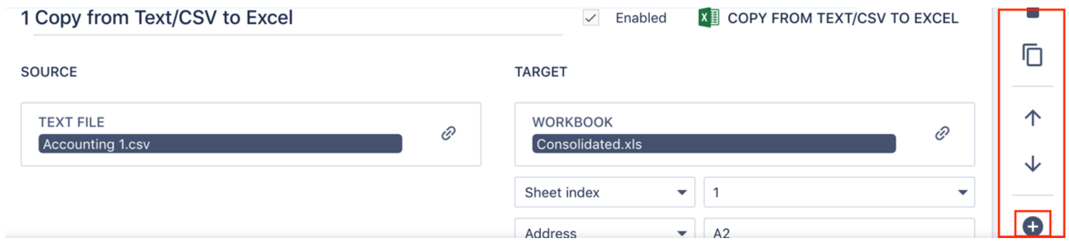


Make sure your settings are the same as this:

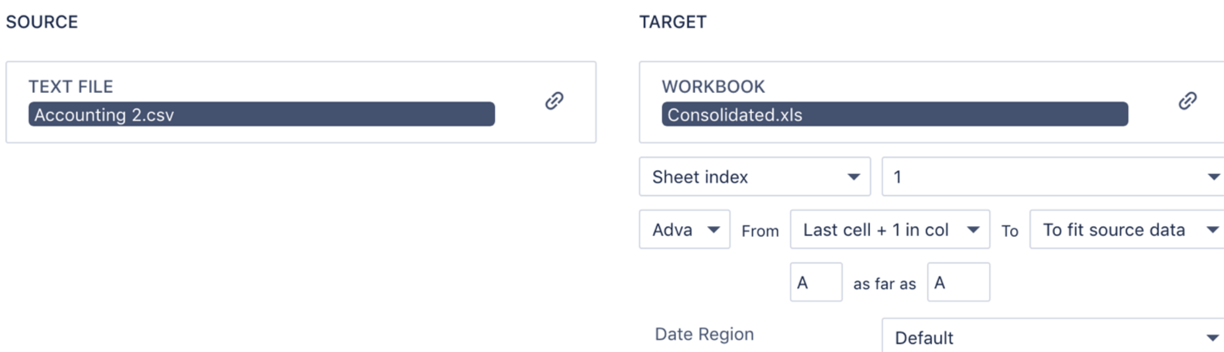


The settings shown above will ensure that the data copied from **Accounting 1.csv** will be inserted into the 1st sheet, starting from cell A2 in **Consolidated.xls**.

Add another **Copy from Text/CSV to Excel** instruction by clicking on the **"+"** on the right-hand side.



Follow the previous steps and make the **Source** as **Accounting 2.csv** with the **Target** still being **Consolidated.xls**. Configure the target to this:

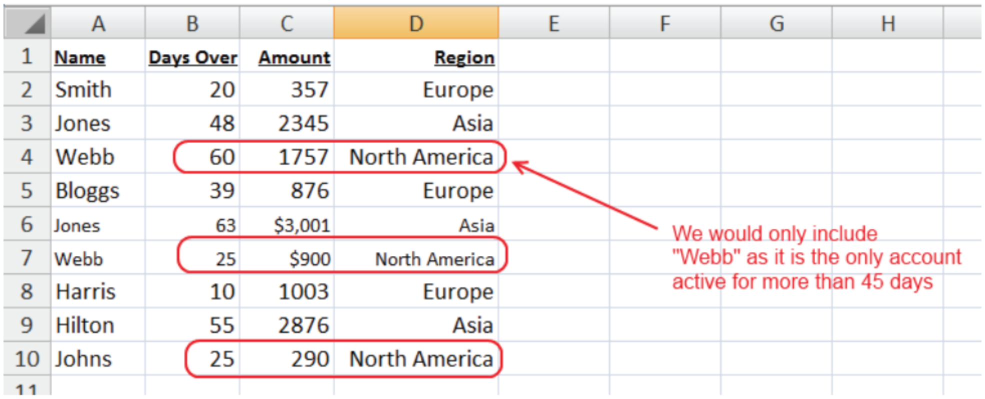


This will ensure that the data from the Accounting system 2 is appended to the end of the Excel data.
Add one more **Copy from Text/CSV to Excel** instruction by clicking on the **"+"** on the right-hand side.

Set the **Source** as **Accounting 3.csv** and the **Target** as **Consolidared.xls** again. Configure the target like the previous screenshot above (same as Accounting 2.csv).

D.2.2 – Splitting the data by region

Once all the data has been copied to the Consolidated file, we would like to produce a region-specific report. This report will show customers for a selected region with an outstanding account balance overdue by more than 45 days. For example, if we were to generate the report for "North America" these entries will be the selected entries:



	A	B	C	D
1	Name	Days Over	Amount	Region
2	Smith	20	357	Europe
3	Jones	48	2345	Asia
4	Webb	60	1757	North America
5	Bloggs	39	876	Europe
6	Jones	63	$3,001	Asia
7	Webb	25	$900	North America
8	Harris	10	1003	Europe
9	Hilton	55	2876	Asia
10	Johns	25	290	North America

To create the regional report, we want to selectively copy data from the consolidated file where the "Days Over" is greater than 45 and the "Region" is the same as what has been selected by the user in step 1.2.

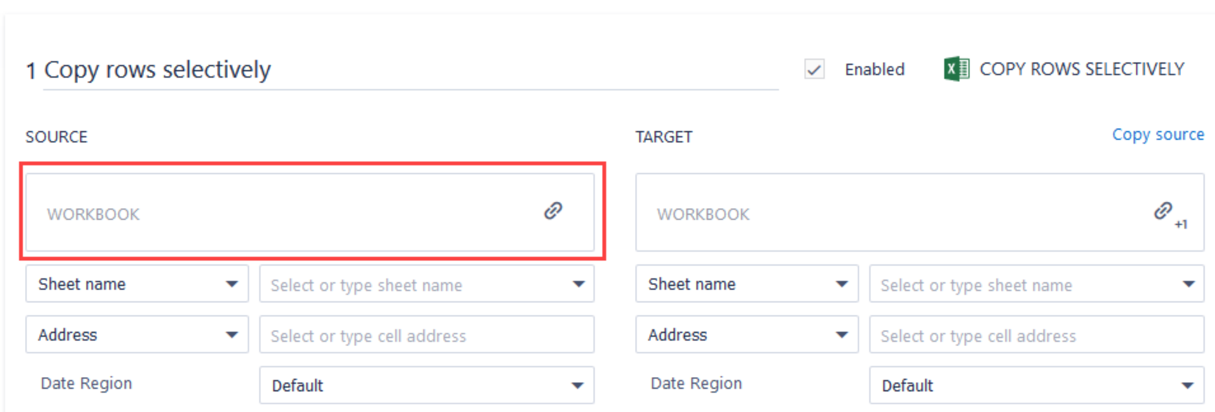
Add a new action step to group 2 with the following details:

- ✓ Type - Multiple file manipulations
- ✓ Instruction - Copy Rows Selectively
- ✓ Name - Split data by region

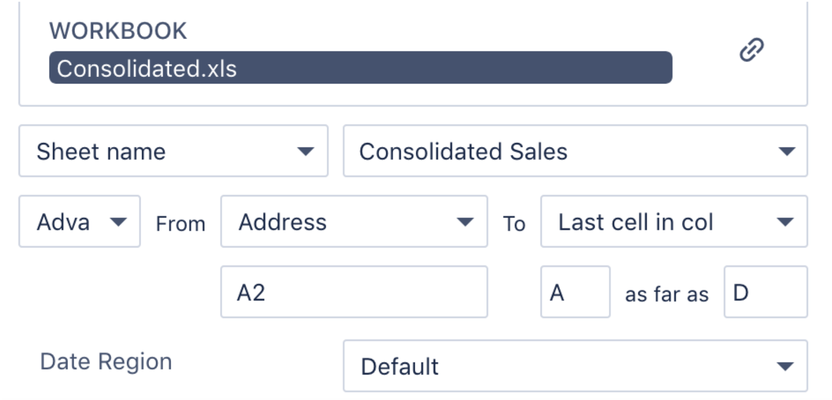
Add a new action step called **Split Data by Region** in Group 2 (Generate Accounts by Region).

Follow the steps like before by selecting **Manipulating Data** in the banner and then choose **Manipulate Data**. Here, select the step instruction **Copy Rows Selectively**.

A new workspace will appear, click on the **Link** icon and select **Consolidated.xls** from **1.3 Consolidated Data**.

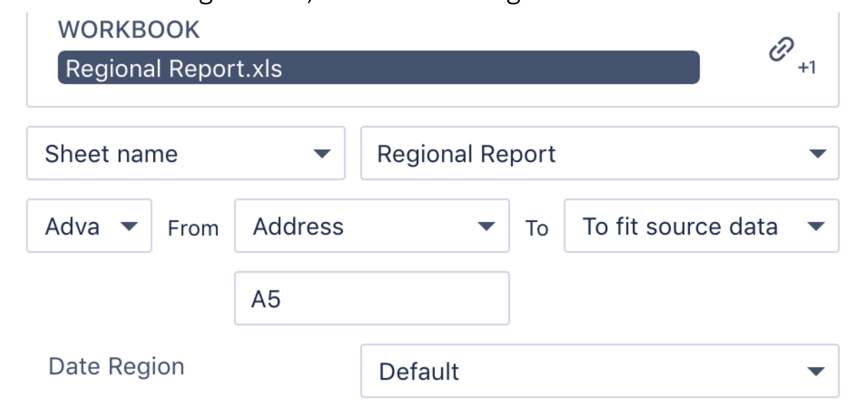


Copy the image below for configuring the step property:

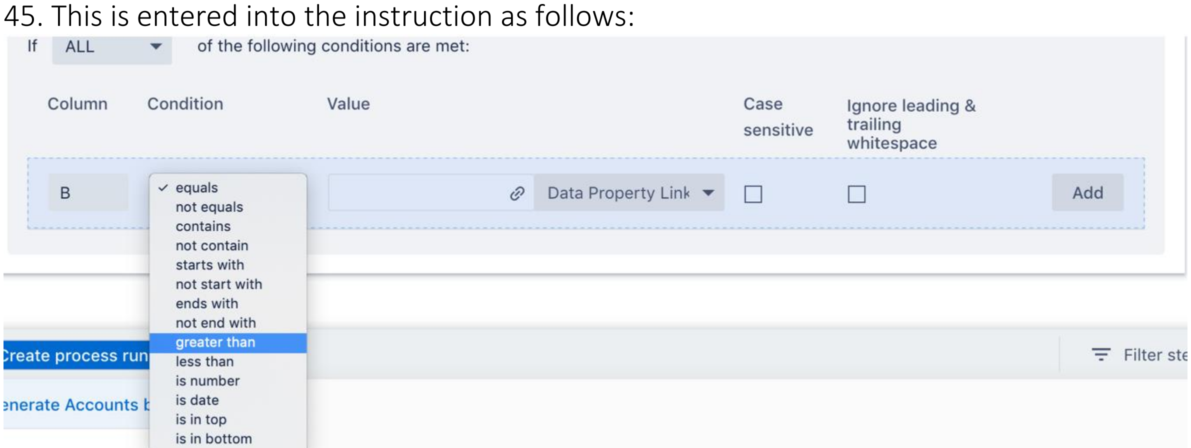


For **Target**, follow the same process by linking the workbook to **Regional Report** from **1.4 Regional Report**.

As for the configuration, follow the image:

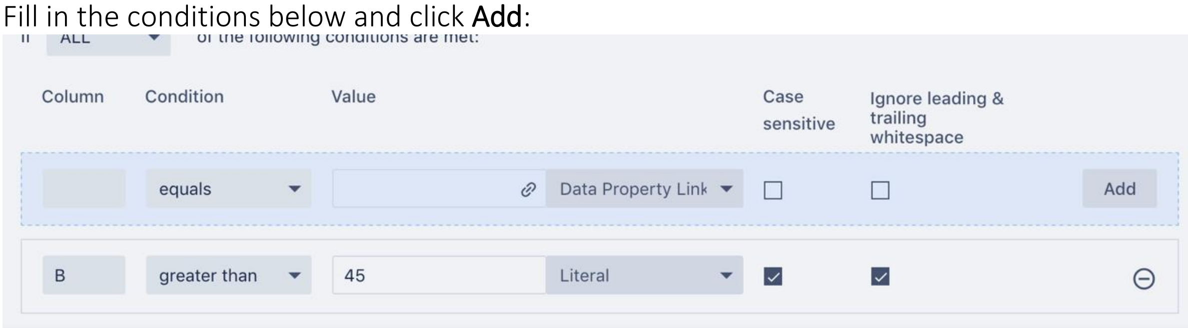


Scroll wn the workspace to the Settings field and tick the box Copy Cell Format.
Next, we want to add some conditions under which rows of data will be copied to the regional report. The first condition will be that Column B (the "Days Over" amount) must be greater than 45. This is entered into the instruction as follows:

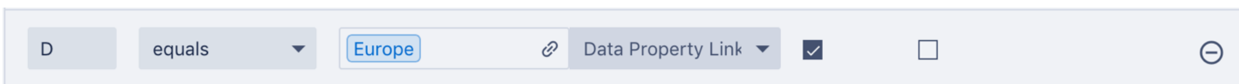


The blue space is where you can edit and add instructions. The dropdown bar is where **equals** and **Data Property Links** are.

Fill in the conditions below and click **Add**:



The second condition will be that column D is equal to the **Region** selected in step 1.2. <u>Column D</u> must <u>equal</u> to the **Region** chosen in Step 1.2 (in this case, Europe). Check the box "Case Sensitive" for this condition.

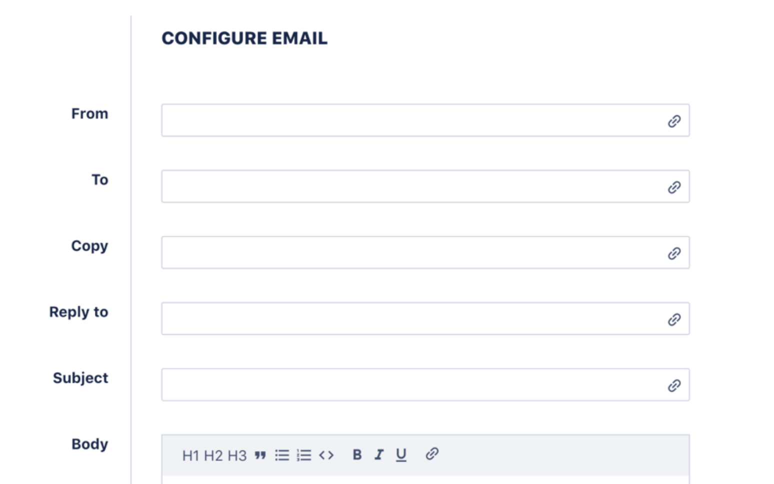


Save the step.

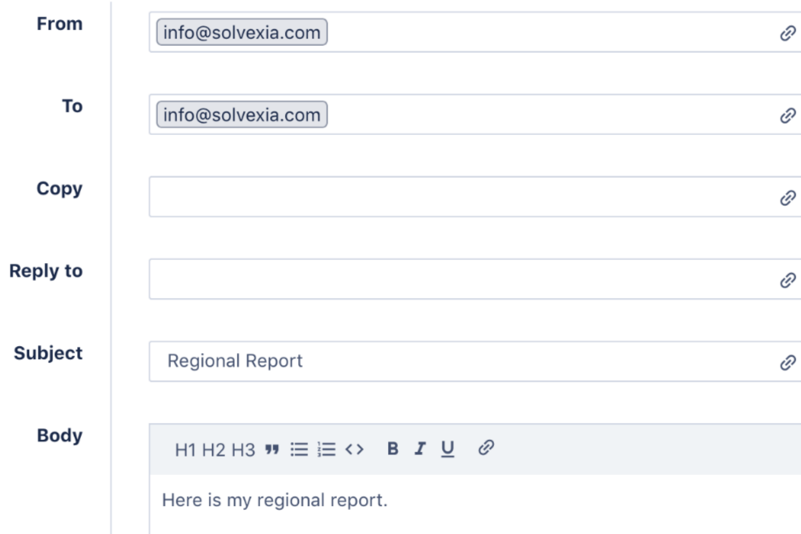
D.2.3 – Email the regional file to the manager

With the regional files now populated with the correct data, the system can be configured to automatically email the relevant person, with the report file attached. Create a new step group called **Send the report**. Within the new group, add an action step, and select **Send an email** (under communications). Name the action step **Email the report**:

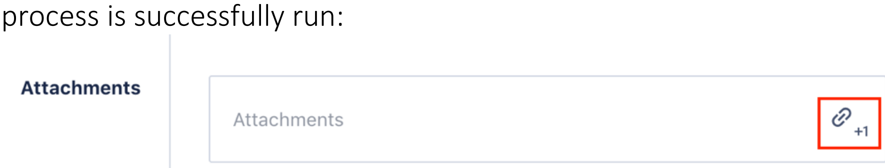
Your workspace should look like this:



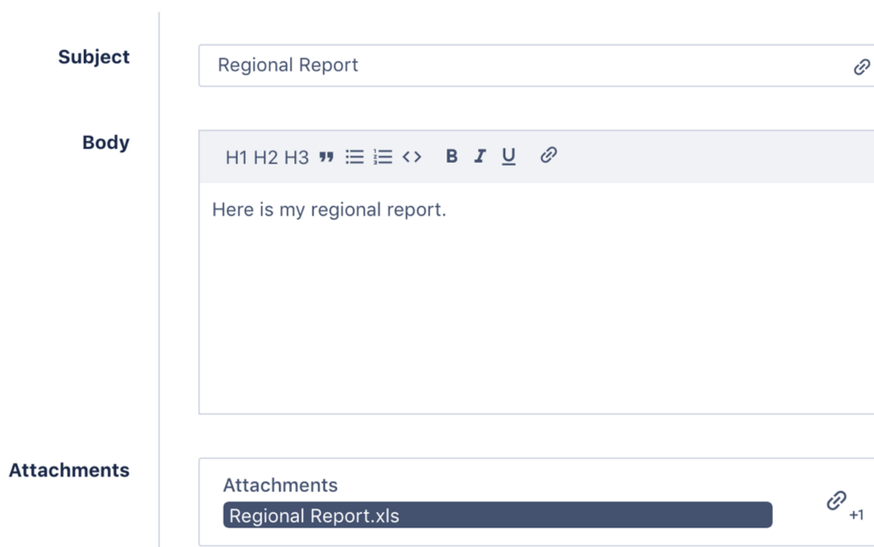
Much like a standard email, *enter the email address of the person who will receive* the regional re, as well as a subject, and a body. For the purpose of the tutorial, enter your email address in place of info@solvexia.com.



Attach the **Regional Report.xls** from **1.4 Regional Report** data step by clicking on the link button in the **Attachments** field. The system will automatically attach and send the file each time the process is successfully run:



Your workspace should look like this:



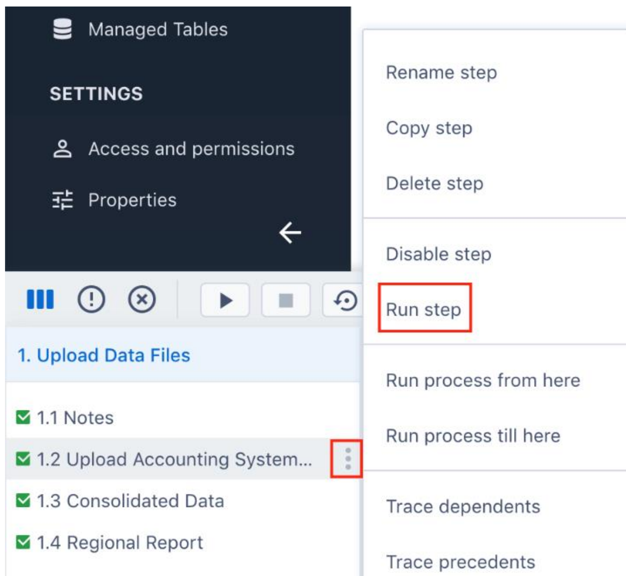
Once completed, click **Save.**

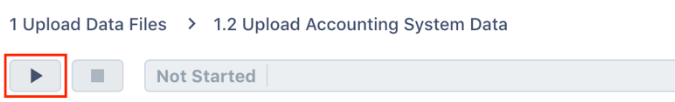
If you've made any mistakes, you can always go back into your data steps by clicking on them. Also, if you've created your data steps in the wrong order, click on your chosen data step and drag it to the correct location.

E – Running the process

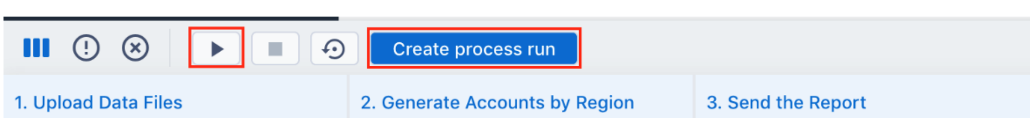
The process can now be tested to ensure that it will run correctly. Each step can be tested individually by either:

- ✓ Clicking on the three dots next to the step name in the group, and selecting **Run step**;
- ✓ or Opening the step, and clicking the **Run** icon located in the top left-hand corner of the workspace

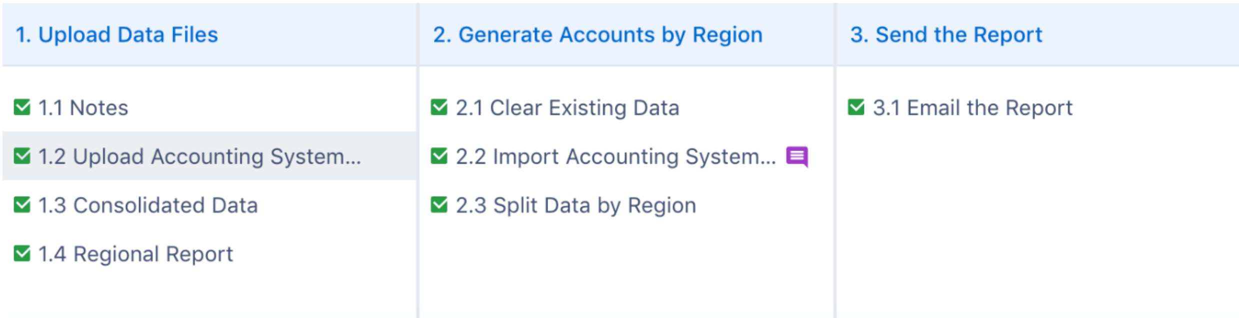




Instead of running an individual step, the entire process can be run. Do this by clicking on the **Create Process Run** button or selecting **Run Process** icon:

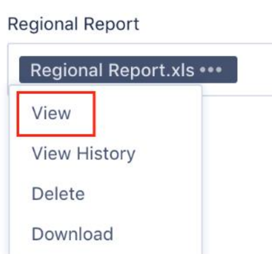


After clicking on Run, the system will provide the current status of the run, just below the workspace. Once complete, the successful run is indicated by a green tick beside each step.



If you entered your email address into the communications step, you should receive an email with the regional report attached.

Alternatively, go to the data step for the regional report and Click on the file **Regional Report** and a dropdown menu will appear, then click on **View**.



This confirms that it has been populated.

<u>TIP:</u> Try running the process a few times with a different region selected in step 1.2 (e.g. from North America to Asia) to see the effect on the regional report.