forestpin

Quick Start Guide

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https://forestpin.com

Quick Start

Forestpin Analytics detects outliers in transaction streams [1]. It comes with a set of advanced analyses out of the box, accompanied by visualizations and a simple consistent interface to make it very easy to use. You can either analyse data on the application by uploading data, or connect to a Forestpin Enterprise Server and analyse data on the server.

[1] e,g, invoices, payments, sales orders, and goods receipts, etc. For further details please refer to **docs.forestpin.com**
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The getting started guide will guide you through uploading and analyzing data on Forestpin Analytics application.

*Before you get started please familiarize your self with **Terminology***

Welcome Guide

When you start the application it will show a welcome guide. You can close it by clicking the **Close** button. These help messages will appear as you go through the application, guiding you through different features.

You can click ? icon on top-right corner of the screen, anytime you want to view these guides.

Register Your Application

When you start the application for the first time, you will be prompted to register with your Forestpin ID. If you do not have an ID, you can obtain one by visiting **account.forestpin.com**.

Read more about licenses, pricing and free trials at **account.forestpin.com**
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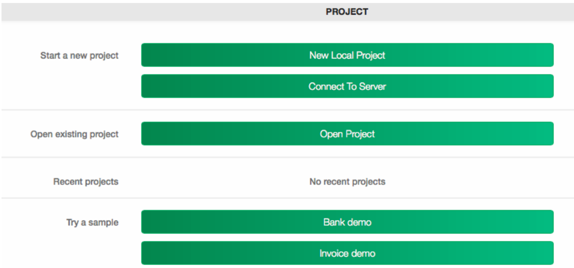
Startup Screen

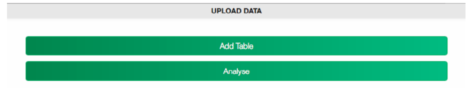


You can upload your data and analyse by starting a **New Local Project**, or analyse data on a enterprise server (**Connecto To Server**). If you have a saved project file you can open it, or click on one of the sample datasets if you want to try out the application without uploading your data.

Obtain server connection settings from the *admin*. Connections get saved and appear on *Recent Projects* section.

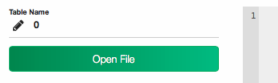
Upload Data

Click **New Local Project** to upload data.



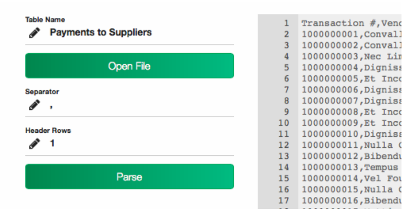
You can upload multiple tables by clicking **Add Table** more than once. Do not click **Analyse** until you have uploaded all data.

Click **Add Table** to add a data table. You can either open a file (**Open File**) or paste copied data to the text area on the right. If you have the data on a spreadsheet it is easier to copy and paste it.[1]



[1] However, if the dataset is large it's better to save from the spreadsheet software as a `.csv` file and open it.

Once the data is loaded, either by opening a file or copy-pasting on the text-area, two input fields will appear on the left, as shown in the screenshot below:



1. **Separator:** The separator character used (e.g. `.csv` files it is `,`).
2. **Header Rows:** Number of header rows in the dataset.

Next, click **Parse** to parse the data.

Select Columns

Before analyzing parsed data, each column needs to be identified as one of **id**[1], **value**, **date**, **string**[2], or **ignore**[3].

Here's an example screenshot with a column selected, and its type shown to the left:

Clicking on a column will show its *type* and *column name* to the left. Change these as needed by selecting one of the options. Most of the column types will be automatically picked up by analysing their contents, and the column names will be picked up from header rows.

[1] **id** - an unique identifier which classify transactions based on a *group*, such as vendor, company, branch

[2] **string** - a name refering to an **id**, for example vendor name linked to a vendor code

[3] **ignore** - unnecessary column

Analyse Data

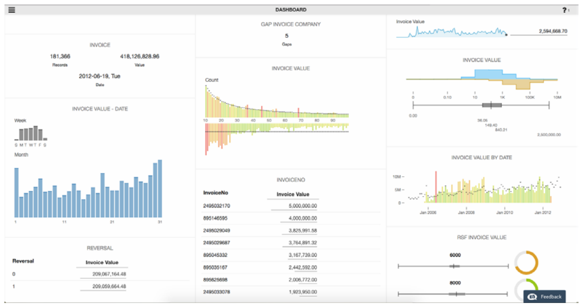
Once data is uploaded and columns are selected, you are ready to analyse data. Click **Analyse** to proceed.

Dashboard

After the analysing, Forestpin will display the **Dashboard**. The Dashboard shows summaries of different analyses divided into *Tiles*. Clicking on these *Tiles* will take you to the detailed view of the selected analysis.

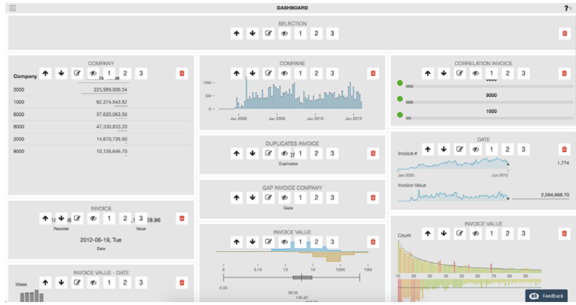
Depending on size of the datasets, it might take a few of seconds to analyze.

The green progress indicator at the top of the screen will show progress.



Edit Dashboard

The dashboard can be edited to suit your preferences. Click at the top-left corner to open the sidebar, then click on **Edit Dashabord** to edit the Dashboard. The dashboard with control buttons, similar to the screenshot below, will load.



- Move - or
- Hide/Show - or
- Edit -
- Resize - **1**, **2**, or **3**
- Delete -

To save the preferences after making changes, first click click to open the side bar, then click **Finish Editing Dashboard** to save changes.

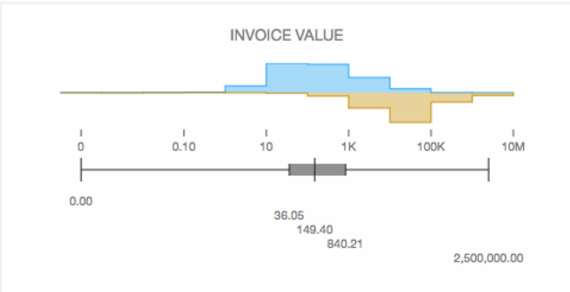
Read the **Dashboard Settings** section for detailed instructions on editing the Dashboard.

Analyses

All analyses share concepts of *dashboard tiles*, *detailed views*, *settings*, *notes*, *bookmarks* and *filtering*. So you can quickly and easily learn everything by going through a single analysis.

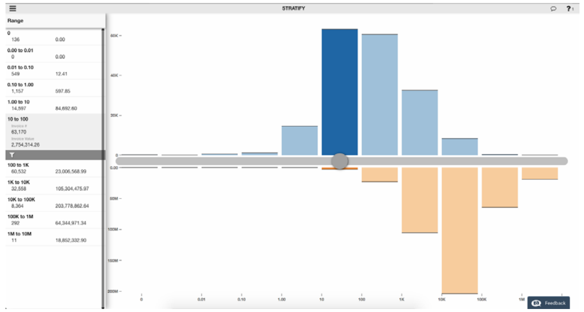
The user can go to detailed views of analyses by clicking on Dashboard Tiles. For illustration. lets pick the **Stratification Analysis**.

Read the chapter on **Stratification Analysis** for more details.



The Stratification Analysis tile looks similar to this.

Click on the *Tile* to view details of that analysis. You can see values on the list in the left hand side. Clicking on the bars or moving the slider will highlight the values on the list corresponding to the selected bar.



Detailed view of the Stratification Analysis looks like this.

To change settings of the analysis, open the Sidebar by clicking ☰. You can change following settings in *Stratification Analysis*:

- *Datastore* -
- *Value* - $

Click **Apply Changes** at the bottom of the Sidebar to save settings.

Navigation

In the Sidebar, click **Back** to go to the previous screen, or click **Home** to go to the initial Dashboard.

Filters

When you are in the detailed view of an analysis, there is a Filter icon below the selected item on the left list. Click this icon to drill-down. It will filter the transactions by the selected criteria, and take you to the Dashboard analysing only the filtered data.

In Stratification Analysis the data can be filtered by the selected amount range, by clicking

Notes & Bookmarks

On any view/screen, click on the notes icon / to open the Notes panel. Click **Add Note**, enter the Note text, and click **Submit Note** to add that Note.

When you add a Note, a Bookmark is created for that view. You can use a bookmark for reference. Notes are a very powerful tool that enables teams to collaborate and analyse data.

Terminology

Transaction

e.g. *Invoice*, *Sales Order*

A Transaction is a record containing a set of **parameters**. Each parameter could be a **date** - , **value**- , or an **id**- .

An **id** - is an unique identifier which classify the transactions based on a **group** - , such as *vendor*, *company*, and *branch*.

e.g. if the **group** is *country*, then **ids** would be *USA*, *India*, *China*, etc.

Dataset

A dataset is a set of transactions. All the transactions in a dataset are of the same type.

e.g. *Invoices*, *Payments*, *Goods Received Notes*

In Forestpin, each dataset is stored in a different **datastore** - . So when you are analysing data, in some cases, you might have to select the **datastore** - you want to analyse.

Filter

Datasets can be **filtered** - based on different criteria. These filter criteria should be based on the **parameters** in transactions.

The Forestpin interface lets you add new filters and **drill-down** - whilst analysing data.

e.g. filter **transactions** for the month of June, 2015 in *Invoice* **datastore**,

Breakdown

The concept of **breakdown** - applies to certain analyses only. In these analyses the data is *broken down* by the breakdown criteria, and analysed.

e.g. **breakdown** *Invoice* **datastore** by **group** *Vendor* and run the *timeseries analysis* for each vendor.

Dashboard

The **Dashboard** is a summarized overview of many analyses run on your datasets, divided into **Tiles**. A tile gives a summary of an analysis. It also acts as a link or a shortcut to a detailed analysis.

Notes

Notes are like comments or annotations you can make on data. These can be shared among users for collaboration. Notes can also be used as **bookmarks** to analyses.

Sidebar

The **Sidebar** is a pane of options available from any screen inside Forestpin. The individual options which are displayed in the Sidebar will vary depending on the context and/or analysis.

Sidebar can be opened by clicking the icon on top-left corner of the application.

e.g.: Filter, sort, search, navigation, etc.

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