

Platform Documentation

Getting started, core concepts, and key workflows.

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exigyn.com · start.exigyn.com

Welcome to Exigyn. Exigyn is a biotech-native financial planning & analysis (FP&A) platform that brings cash runway, headcount planning, clinical-trial budgets, department OpEx, CapEx, and board reporting into one place — with zero implementation. This guide introduces the platform, its core concepts, and how to get productive quickly. [Screens and step-level detail can be expanded with product screenshots before publishing.]

1. What Exigyn Is

Exigyn replaces the patchwork of spreadsheets and slow enterprise EPM tools that life-sciences finance teams typically rely on. Instead of a multi-quarter implementation, your workspace is provisioned automatically with a biotech-ready chart of accounts, departments, and example scenarios, so you can start modeling in minutes. AI connectors let you work with your data directly from Excel and PowerPoint and through the Claude (MCP) connector.

2. Getting Started

1. Go to **start.exigyn.com** and create your account.
2. Subscribe to the self-serve plan via secure Stripe checkout. Your workspace is provisioned automatically.
3. On first sign-in, you will find a seeded chart of accounts, departments, and example scenarios you can explore or replace with your own data.
4. Invite colleagues — the plan includes unlimited users — and start with the module most relevant to you (for many teams, Cash Runway).

3. Core Concepts

- **Accounts:** your chart of accounts — the financial backbone for planning and reporting.
- **Projects / Programs:** organize spend and activity around clinical programs or initiatives.
- **Scenarios:** named versions of your plan (e.g., Budget, Forecast, Actuals) you can build, compare, and stress-test.
- **Departments:** group OpEx and headcount by team.
- **Milestones and Drivers:** key dates and assumptions that drive forecasts and runway.

4. Modules

- **Model Parameters** — accounts, projects, and scenarios that configure your model.
- **Headcount Planning** — FTEs, fully-loaded cost, and hiring ramp.
- **Clinical Programs** — trial spend, milestones, and clinical-trial accruals (beta).

- **Department OpEx** — vendor and operating spend by team.
- **CapEx Tracking** — equipment and capital projects.
- **Allocations / Project Time** — time and cost allocation across programs.
- **Cash Runway** — burn, milestones, runway, and zero-cash date.
- **Scenario Comparison** — side-by-side diffs across plan versions.
- **Budget vs Actuals** — live variance reporting.
- **Financial Statements** — P&L, balance sheet, and cash flow.
- **Board Decks** — generate board-ready reporting from your live data.
- **Exigyn Intel** — SEC/EDGAR data, peer benchmarks, and ClinicalTrials.gov context.

5. Importing Your Data

You can bring existing data into Exigyn by uploading files such as CSV, XLSX, and PDF — including CRO budgets and enrollment data. From source documents, the platform helps you map inputs and build artifacts such as patient-visit accrual grids and CRO fee grids, and generate forecasts based on projected enrollment. Review imported data and mappings before relying on results.

6. AI Connectors

- **Excel Add-in** — two-way sync so you can pull live data into Excel and push updates back.
- **PowerPoint** — turn your live numbers into board-ready slides.
- **Claude / MCP connector** — an agentic assistant that can read and work with your finance and operations data, help with planning, budgeting, and long-range planning, and translate scientific context into business insight.

Connectors authenticate with scoped credentials that you control and can revoke at any time. See the Security page for how connector data is handled.

7. Common Workflows

- **Build a cash-runway view:** confirm your accounts and drivers, set milestones, and review burn and zero-cash date.
- **Generate a board deck:** select a scenario and produce reporting slides from live data.
- **Run budget vs actuals:** compare a budget scenario against actuals to surface variances.
- **Model clinical-trial accruals:** import a CRO budget and enrollment plan, then build the accrual grid and forecast.

8. Managing Your Account and Billing

You can manage your subscription, payment method, and invoices through the billing portal (powered by Stripe), add or remove users, and cancel at any time — cancellation takes effect at the end of the current billing period. See the Terms of Service for billing details.

9. Security and Data

Your data is encrypted in transit and at rest, and workspaces are logically isolated. For details and to report a concern, see the Security page or email security@exigyn.com.

10. Getting Help

HELP AND RESOURCES

Product support — support@exigyn.com

Security — security@exigyn.com

Privacy — privacy@exigyn.com

Application — start.exigyn.com