

Vendor Data Mining

What will be covered:

This session will provide an overview of vendor data mining basics. Learn how to build custom reports using the data fields from the vendor area.

Vendor Data Mining is an extremely flexible and effective tool that can be used to create user defined reports on vendor information, not otherwise collected by the software in a standard report format.

- Demonstrate how to configure a vendor data mining template.
- Selecting fields to print data from available field areas.
- How to utilize ranges to limit data that displays on the report.
- Discuss use of the "Print Information on one line per person" option for Excel reports.
- Creating address labels for all or just a small range of Vendors.

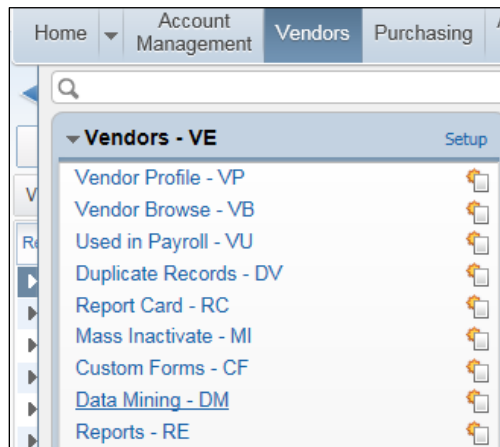
Links to additional resources:

[Vendor Data Mining](#)

Vendor Data Mining

Data Mining is a flexible reporting tool that can be used to create user defined reports on vendor information not otherwise collected by the software in a standard report.

To access Vendor Data Mining, navigate to Financial Management > Vendors > Data Mining.

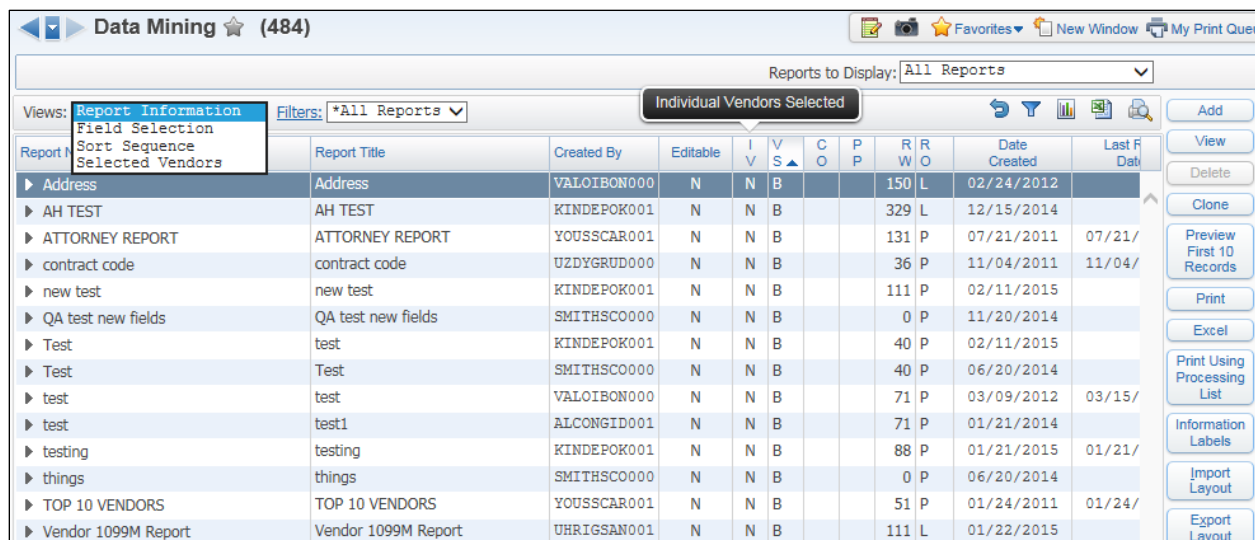


Data Mining Browse

The Data Mining report browse will display. You can change the browse display using the available drop-downs:

- Views
- Filters
- Reports to Display

Hover over any of the initialized column headings for a full description tool tip.



Most of the maintenance buttons on the right side of the browse will be active with two exceptions:

1. View or Edit. The View button displays on reports that another user created. The Edit button displays on reports you created.
2. Delete – The Delete button is active only on reports you created.

Add Data Mining Report

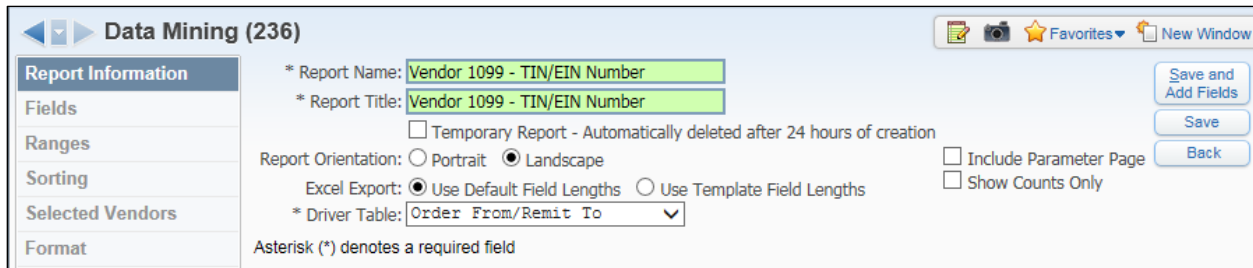
Select the Add button on the Data Mining report browse screen to create a new report.

Report Information

Enter and select the report information.

- Report Name
- Report Type
- General report options:
 - Temporary Report
 - Include Parameter Page
 - Show Counts Only
- Report Orientation
- Excel Export
- Driver Table – Select the table to pull the records from:
 - Remit To
 - Order From/Remit To

Select the Save and Add Fields button to continue.



Fields

When the Save and Add Fields button is selected the Fields selection screen displays.

To select the fields for the report, highlight a field from the Field Areas window. If there are more choices for the field, the options for that field then populate in the next window to the right. If that field has more options, then the window to the right of it will populate accordingly, and so on.

When the fields are selected they can be sorted using the Up and Down buttons, or removed using the Delete button.

To add a field:

- Highlight it from the Field Areas.
- Select the Add This Field To Report button.
- It will list in the Fields on Report window.
- Repeat until you have all the fields you want for the report.
- You can sort the fields here using the Up/Down buttons.
- You can remove a selected field using the Delete button.

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Report Name: Back

Report Title:

Report Orientation: Vendor Status: Excel Export:

Field Selection Field Search

Field Areas	1099M Information
Name	TIN: EIN Number
Address	Social Security Number
Contact Info	1099-M Recipient Box Code
General	1099-M Recipient Box
Order From	1099-M Default Type Code
Calendar Totals	1099-M Default Type
1099M Information	A/P Contact
Custom Forms	Account Number
	UBI Number
	W9 Date

Selected Field

Description:

Used For:

Heading 1:

Heading 2:

Length:

Fields on Report	
Full Name	[R2 Name]
TIN: EIN Number	[1099M Info]
Social Security Number (SSN)	[1099M Info]

Report Width:

Two new fields are now available on the Web Vendor Data Mining report:

- Default Check Type

Field Selection window showing 'Default Check Type' selected under the 'Contracts' field area.

- Print A/P Contact on A/P Check and Voucher

Field Selection window showing 'AP Contact on Check?' selected under the '1099M Information' field area.

Addendum 8 to the June 2017 Release – RN ID 3429501

Select Save and Back to review the fields just selected or Save and Modify Ranges to continue building the report.

If Save and Back is selected the Fields window opens. You can modify the fields as needed, then to continue building the report, select the Ranges tab or another tab option from the panel on the left of the screen.



When Save is selected, the range fields are then closed and the buttons on the right change to Edit Ranges and Add/Delete Fields.

Sorting

Select the Sorting tab from the panel to continue building the report.

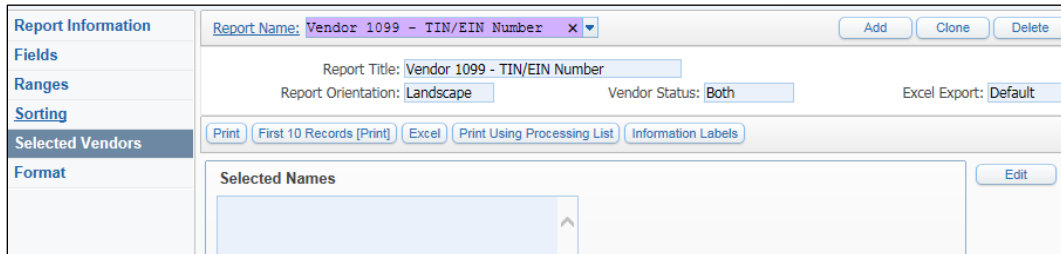
To set the fields to sort by select the Edit button.

- Highlight the field(s) to sort by and select the > button.
- Select a Break option.
- Select if you want a count per break.
- Select the Save and Back button when finished.

Selected Vendors

The Selected Vendors tab allows you to select specific vendors to appear on the report. Otherwise, the report will include all vendors where the data fits within the ranges that are set up for each field.

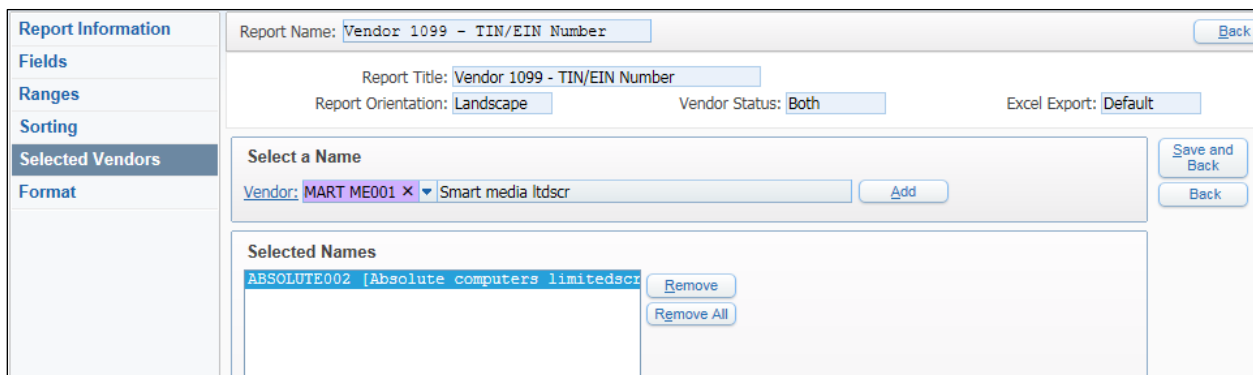
Select the Edit button.



The screenshot shows the 'Selected Vendors' tab. The 'Selected Names' field is empty. The 'Edit' button is located to the right of the field.

A Select a Name option opens. Select a vendor and click the Add button. The vendor name then displays in the Selected Names field.

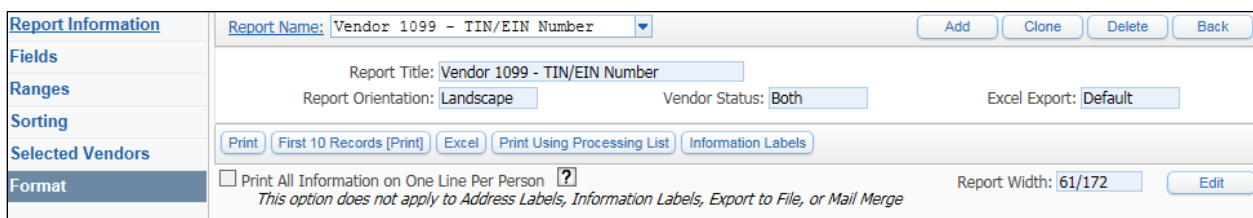
Select Save and Back when finished choosing the vendors to report on.



The screenshot shows the 'Selected Vendors' tab with a dropdown menu open for 'Vendor: MART ME001'. The 'Add' button is highlighted. The 'Selected Names' field now contains 'ABSOLUTE002 [Absolute computers limitedscr]'. The 'Save and Back' button is visible on the right.

Format

The last tab is Format where you can select to Print All information on One Line Per Person.



The screenshot shows the 'Format' tab. The 'Print All Information on One Line Per Person' checkbox is checked. The 'Report Width' is set to 61/172. The 'Edit' button is visible.

- Select the Edit button.
- Check the Print All Information on One Line Per Person option.
- This brings up Table information. Click the ? Help icon for more information on this option.

Report Name: Vendor 1099 - TIN/EIN Number Back

Report Title: Vendor 1099 - TIN/EIN Number

Report Orientation: Landscape Vendor Status: Both Excel Export: Default

Print All Information on One Line Per Person Report Width: 61/172

This option does not apply to Address Labels, Information Labels, Export to File, or Mail Merge

Table Information Save and Back

Table Name	Print #
	1

Back

Table Information Explanation

The Table Information becomes sensitive when the report is set to print in 1 line per person mode.

The Table Name is a block of fields that will all be printed together.

The Print # is the number of times that block will be printed in the 1 line. This is used to print that block multiple times. Certain tables will not have this option because there is only 1 set of data for the fields (e.g. Name).

Example:

Data - Full Name: Alfred Smith	Pay Code 1: TEACH	Pay Code 2: Coach
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Table Info - Table Name	Print #
Name	1
Pay Records	2

Line Headings - Full Name	Pay Code	Pay Code
Line Print - Alfred Smith	TEACH	COACH

OK

Running the Report

When finished building the report, it can be printed from here, the Format tab. (You can also use the print options from the Data Mining browse screen.)

Note: The maintenance and print options first display after the Fields section is saved.

Report Name: Vendor 1099 - TIN/EIN Number Add Clone Delete Back

Report Title: Vendor 1099 - TIN/EIN Number

Report Orientation: Landscape Vendor Status: Both Excel Export: Default

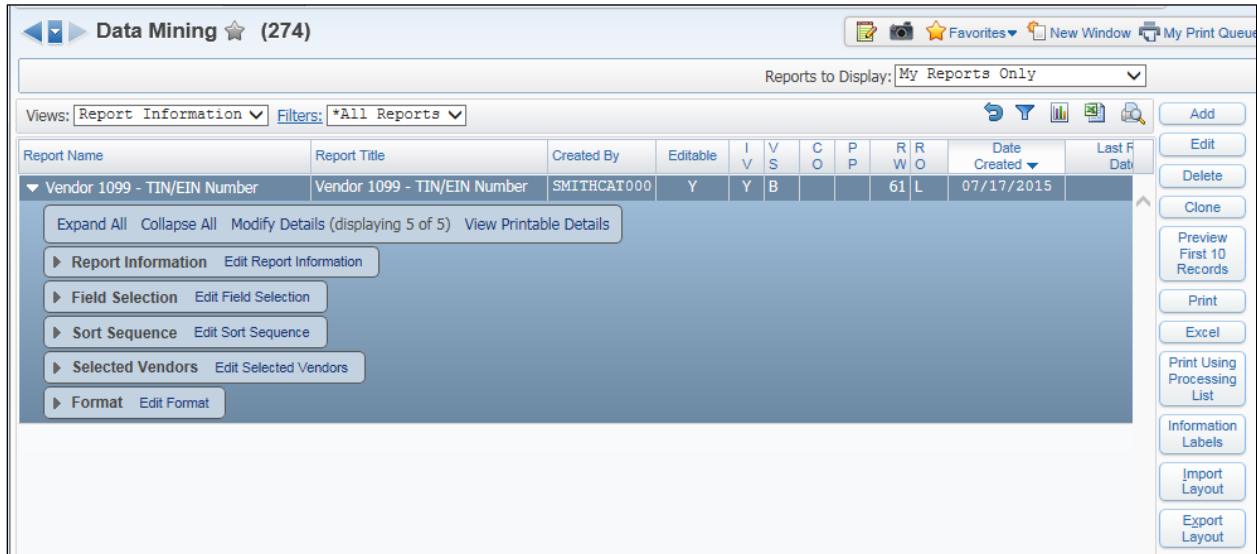
Print First 10 Records [Print] Excel Print Using Processing List Information Labels

Select Print to run the report; the process runs on the print queue. Select View Report when finished.

Below is an example of a Vendor user-defined report.

3vmrpt04.p 03-2		Entity (000)
05.15.06.00.00		Vendor 1099 - TIN/EIN Number
Full		
Name	TIN:EIN Number	SSN
Absolute computers limitedscr	00-0000493	123-00-049
Smart media ltdscr	00-0004121	123-00-412
Vendor Count:2		

On the Data Mining browse screen, the new report is listed. You can expand a report to view its details. The Edit / View options will toggle – depending if it is your report, or one someone else created.



The screenshot shows the 'Data Mining' interface with a report list. The report 'Vendor 1099 - TIN/EIN Number' is expanded, showing a detailed view with various configuration options.

Report Name	Report Title	Created By	Editable	I V	V S	C O	P P	R W	R O	Date Created	Last F
Vendor 1099 - TIN/EIN Number	Vendor 1099 - TIN/EIN Number	SMITHCAT000	Y	Y	B			61	L	07/17/2015	

Expanded Report View: Vendor 1099 - TIN/EIN Number

- Expand All Collapse All Modify Details (displaying 5 of 5) View Printable Details
- Report Information Edit Report Information
- Field Selection Edit Field Selection
- Sort Sequence Edit Sort Sequence
- Selected Vendors Edit Selected Vendors
- Format Edit Format

Right-hand navigation buttons: Add, Edit, Delete, Clone, Preview First 10 Records, Print, Excel, Print Using Processing List, Information Labels, Import Layout, Export Layout.