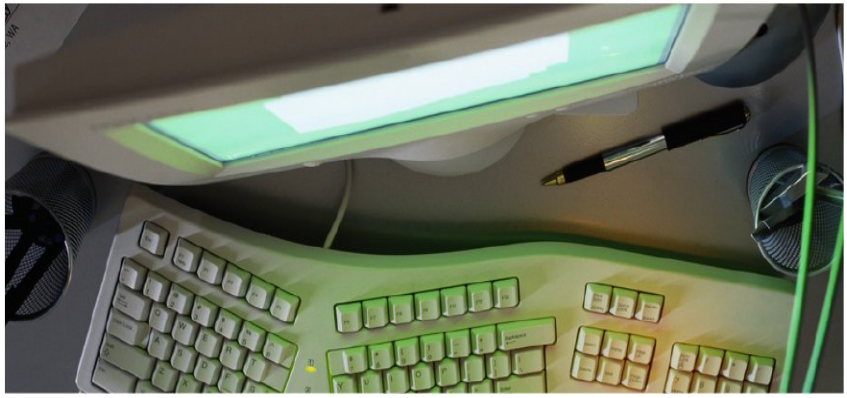# Visa IntelliLink
Spend Management

Data Analysis Tool

Creating the Data Analysis template

Program Administrators will be able to create highly configurable data output files for reporting and analysis purposes.

The output file has one transaction per line and may include Enhanced Data.

To create the Data Analysis template:

1   Click the Administration link located in the left-side menu. The Administration Overview screen is shown.

2   Click the Data Analysis link located in the left-side menu. The Data Analysis screen is shown.

3   Enter the template name and file name in the appropriate fields.

4   Click the File Type drop-down arrow and select the file type from the drop-down menu.

5   If Text is selected as the File Type, an additional field called Field Delimiter will appear. Click the drop-down arrow and select the delimiter from the drop-down menu.

6   Click the Date Format drop-down arrow and select the date format from the drop-down menu.

7   Note that the Standard Filters, such as the Statement Issuer and dates, are not saved as part of the template, so you will complete these fields when you run the Data Analysis, rather than now. In Account Report mode, card transactions meeting the conditions listed under Active Filters will be displayed. If Employee Report mode is selected, then only card transactions that are mapped to an employee or any cash transactions will be retrieved.

8   Click the Fields tab. The Fields tab contents are shown.

9   If there are any fields that auto populated into the right-hand Selected fields section, then click the Remove All link to clear them out.

10 Click the Field Category drop-down arrow. The field category menu is shown.

11 Select a field category from the menu. Fields for the selected category are shown in the Available Fields section.

12 Click the + button to select a specific field or click the Select All link to select all fields. The Selected fields section located to the right shows the selected fields.

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13 Click then drag and drop a selected field to create a custom order list. Click and drag as many fields as needed to create the ordered list.

14 Click the gear wheel to the right of each field to edit field properties. The Edit Field Properties dialog box appears.

15 Type the column header name in the Column Header field and type the maximum field length in the Maximum Field Length field.

16 Click the Save button.

17 Click the Advanced Filters tab to customize transaction, merchants, account properties, cardholder details, work flow and additional information filters as needed. Note that if the report is run in Account mode, employee details will be replaced by cardholder details.

18 Click the Save As… button. The Save Template As… dialog box is shown.

19 Confirm the template name is correct as shown in the Template Name field.

20 Click the Save button.

21 To open and edit a previously saved template, click the Open Template button.

Running the Data Analysis

1 Click the Administration link located in the left-side menu. The Administration Overview screen is shown.

2 Click the Data Analysis link located in the left-side menu. The Data Analysis screen is shown.

3 Click the Open Template button. The Select a Template dialog box is shown.

4 Click the template for the file you would like to run, and click the Open button.

5 If your organization creates cash expenses in IntelliLink, you may choose to include just the cash expenses, just the card transactions, or both, in the Statement Issuer drop-down menu.

6 Enter appropriate date range criteria by either choosing a Statement Period, a Start and End Date, or an Execution Range.

7 Click the Run Data Analysis button. The data analysis file is generated and added to the Outbox.

8 Retrieve the data analysis file by clicking on The Vault link under the File Management heading in the left-hand menu. The Folder Inbox screen is displayed.

9 Click on the Outbox link. The Folder Outbox screen is displayed.

10 Click on the Download file icon, which looks like a diskette, to open and/or save the file.

For further assistance, refer to your Contact Matrix.

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