

DataServ Analytics Field Reference

This is a list of the standard fields included in DataServ Analytics. Individual client solutions may have additional custom fields not included in this documentation.

The analytics platform contains multiple data sources including:

Data Source	Description
Client P2P	<p>This data source provides document level information for analytics (e.g. Invoice Total, Days between Indexed and Paid, AutoVouch Exception Reason).</p> <p>The name of the data source is specific to your client (e.g. CompanyIncorporated P2P).</p>
Sample P2P	<p>This data source is the same structure as your Client P2P data source but has a smaller representative sample of data that may help you when building and testing dashboards.</p>

Each data source is composed of facts and dimensions.

Fact Table

Fact tables contain the measurements, metrics, or facts about a business process. Fact tables contain the fields we would want to perform our calculations upon (measures) and facts about that record (e.g. Invoice number, PO Number).

Additions or updates are performed at a high rate.

- Example: Documents.

Dimension Tables

Dimensions are descriptive tables which contain the attributes which the measures can be sliced & diced upon.

Dimensional data does not change as quickly as facts change.

- Examples: Vendor, Location, Document Type Classification, Route To Name.

Note – Sometimes we will use the Dimension tables as a source for a measure, e.g. count the unique list of Locations.

Client P2P Data Source

This data source provides document level information about Invoices for analytics (e.g. Invoice Total, Days between Indexed and Paid, AutoVouch Exception Reason, Vendor).

The name of the data source is specific to your client (e.g. CompanyIncorporated P2P).

Documents included	All documents of Document Type = Invoice Two full years of data based on Indexed Date
Update Frequency	Refreshed once a day
Security	Users with access to this data source can report on all documents. They are not restricted by field level security rules, location matrix, or confidential flag.

The core of the Client P2P data source is the Document fact table.

Table	Type	Sample fields
Document	Fact	Invoice Number Invoice Date PO Number Invoice Amount Due Date Payment Amount Payment Date
Document Type Classification	Dimension	Document Type Classification
Document Type	Dimension	Document Type
Location	Dimension	Location
Route To Name	Dimension	Route To
Status	Dimension	Status
Vendor	Dimension	Vendor Name Vendor Number
Work Group	Dimension	Work Group

Client P2P Data Source > Document Fact Table

Field Name	Description	Examples
AutoVouch Candidate	True if the document was considered for AutoVouch.	True, False
AutoVouch Exception	The last AutoVouch exception reason this document received.	No Receipt Lines Matched

	Blank if no exception	
AutoVouched	True if the document was successfully AutoVouched	True, False
Capture Type	The method document was captured.	Email, Scan
Completed By	Note currently populated, for future user when status is set to Complete	
Completed Date	Populated when the status is set to complete	10/3/2019
Confidential	True if the document is flagged as confidential	True, False
Days Complete to Payment	Calculation of the days between Completed Date and Payment Date. If one of the dates is missing, then the value is "N/A".	3
Days Index to Complete	Calculation of the days between Indexed Date and Completed Date. If one of the dates is missing, then the value is "N/A".	13
Days Index to Payment	Calculation of the days between Indexed Date and Payment Date. If one of the dates is missing, then the value is "N/A".	17
Days Received to Complete	Calculation of the days between Received Date and Completed Date. If one of the dates is missing, then the value is "N/A".	14
Days Received to Index	Calculation of the days between Received Date and Indexed Date.	1

	If one of the dates is missing, then the value is "N/A".	
Days Received to Payment	Calculation of the days between Received Date and Payment Date. If one of the dates is missing, then the value is "N/A".	18
DIN	DataServ tracking number	1020170006
Discount Date	The Discount Date for the document calculated by the Payment Terms.	10/9/2019
Discount Missed	1 if the Payment Date is after the discount date.	0 or 1
Discount Taken	1 if the Payment Date is on or before the Discount Date.	0 or 1
Document Touches	Not currently populated, for future use	
Due Date	The date the document is due to be paid.	10/16/2019
Indexed Date	The date the document was put into the system by DataServ, after it is processed by Digital Mailroom	9/20/2019
Invoice Date		9/17/2019
Invoice Number		910001
Invoice Total	Total amount of the invoice as seen on the document	300.01
Payment Amount	Amount paid.	300.01
Payment Date		10/6/2019
Payment Terms		NET 30
PO Number		190015735
Potential Duplicate	True if this document was flagged as a potential duplicate. The value disappears after it is reviewed.	True, False
Received Date	Date the document was received by DataServ.	9/19/2019
Routed Date	Date the document was last routed to a specific user	10/2/2019

Solution Type	Will always show P2P Documents.	P2P Documents
Transfer Date	Date the document was transferred to client ERP.	10/2/2019
Vendor Not Found Reason	The reason the Vendor was not identified by DataServ's Digital Mailroom.	!NO MATCH ON VENDOR ADDRESS!

Client P2P Data Source > Dimension Tables

Several dimensions have been created in the Client P2P DataSource

Dimension Name	Dimension Description
Document Type Classification	Further classification of the document type (ex. NON-PO, PO, Credit Memo)
Document Type	The type of document, currently only AP Invoices are supported
Location	Distinct list of locations
Route To Name	Distinct list of users set up in the Route To list
Status	Listing of the different statuses (ex. New, Complete, Paid)
Vendor	Distinct list of Vendor Name and Number combinations, lists both Vendor Name Vendor Number
Work Group	List of different work group values assigned to documents