# P-Ex DataMining
## *from*
## Suddensource

**P-Ex DataMining** was originally an Excel VBA-based Add-in (known as Proactis Data Mining). It comprised an install-able 'Interface' program and a series of 'Modules'. The interface was installed on users' PCs to create a connection to a database and hold the common functionality. The individual modules were then loaded as required, usually from a central network location. Each module had one or more functions that include: uploading new master data such as price lists, posting journals to Dream (by Unit4) or PSF (by Iris), reporting direct to Excel or performing cal-culations based on data retrieved from the database and reporting the results in Excel.

Other modules produced supplier remittance advices or customer statements, carried out mail merge to a specified ledger or acknowledge orders. Users have made huge time savings where the program has been set up to auto-mate the copying and pasting they previously had to do weekly or monthly.

During the last few years we have re-written this from the ground up. The new version (P-Ex DataMining) is deliv-ered as an end-user downloadable, self-updating .NET VSTO Add-in for Excel, and all functionality is included in what's downloaded by all users. This was developed in parallel with the later versions of P-Ex, for the Office 2016 and later platform. Security within P-Ex DataMining is set at menu or menu item level by user group or by user.

System

P-Ex DataMining is available on its own tab on the Excel Ribbon:



The above shows the connection settings, program options and the dropdowns for:

- Support: mainly utilities for consultants.
- Admin: security, system administration and some other admin-only tasks.
- Import/Update: Import to and Update of data in the P-Ex database.

Reports

The reports are in six menus as shown.

Each menu has between 4 and 9 menu tions. Each menu option brings up a crite-screen, from which you can run one or more reports.



There is a further menu group for any bespoke reports written specifically for a particular client.

## Finance

If your P-Ex system is linked to your finance system, you will also see the Finance tab in Excel.

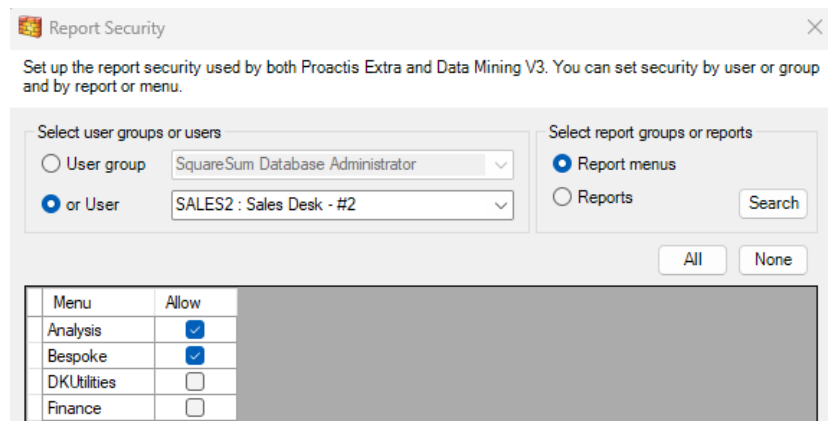On this menu there are various financial reports including Aged Debtors, Aged Creditors and the VAT report, finance listings and finance utilities.
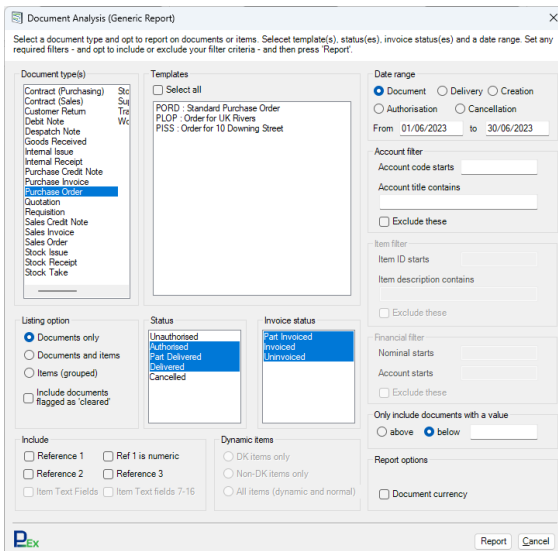


## Security

Security is set from the Admin menu. Admins can see this screen:

If a user's group can see a menu then that user can see all the items on that menu. Otherwise, the user can see the reports/utilities which they have specific access to.



## Output



A typical report criteria screen is shown, and the report output is dumped to Excel:

| | | | |
|---|---|---|---|
| P-Ex Data Mining V4.7.2.46 | | | |
| Report Date: 09/07/2023 | | | |
| Document Report for Purchase Order documents | | | |
| Templates: (PORD) | | | |
| Statuses: ('AO','PD','D') | | | |
| Invoice Statuses: ('PI','IV','UI') | | | |
| Document dates from 01/01/2023 To 30/06/2023 | | | |
| Filters: | | | |
| **Document No** | **Account** | **Account Title** | **Document Date** |
| PORD52885 | AD/SUDDEN | Suddensource | 18/04/2023 |

For information about P-2, the original program, please download one of our P-2 brochures:

- Overview
- Order Processing
- Stock Control
- Invoicing
- Features

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