

**1099 Preview Report
ISRS Report UT9071CB Variation T01
Exporting to MS Excel**

- 1) Access ISRS Report UT9071CB Variation T01
- 2) Enter current tax year and store report for Online viewing
- 3) Click on Process Monitor and View Report and the report will open in a viewing window
- 4) Highlight the report and copy (CNTRL + C)
- 5) Open Notepad and paste the report (CNTRL + V)
- 6) While in Notepad, you may wish to delete the report header, remove the extra blank lines between report pages, and /or delete the report headers on the 2nd page of the 1099 and Exempt reports. You will want to retain the header that tells you the type of report –Type: 1099 & Type: EXEMPT so that you can identify when the new section begins.
- 7) Save the Notepad document
- 8) Open Excel, click on Data, Import External Data. When prompted for a Data Source point Excel to the just saved Notepad document.
- 9) The Text Import Wizard will open. Make the following choices:
 - a. Choose Fixed Width as the data file type and click next
 - b. You will see a preview of your data file with lines delineating columns. Scroll down to see the data and make sure there is a line between every data column. You may need to add a line to make a column for the 2 digit vendor type code and for the zip code. When you are satisfied with the columns, click next.
 - c. Highlight the columns Customer ID, Taxpayer Id Nbr and Vendor Type and change the Column data format type from General to Text. Click on Finish.
- 10) The report data will import to Excel so that the data may be manipulated.