

Query & Analysis Word Financials v10+ for SunSystems

Duration: 1 Day

Prerequisite: Knowledge of SunSystems concepts. Basic understanding of MS Word.

Who Should Attend: New users who need to design financial reports in Microsoft Word.

What You Will Learn: At the completion of this training session participants will be competent in the following:

- Extract reference data into an MS Word document
- Extract monetary or physical balances
- Copy Q&A formulas
- Define the filter criteria of multiple cells
- Use Equation Editor to include a total
- Save a query as a template
- Create a Merge document

Course Content – Q&A Word v10+ for SunSystems

Extracting SunSystems Reference Data

- Defining Detail & Reference Link Reports
- Assigning Bookmark Names

Extracting Values from SunSystems

- Creating a Summary Link Report
- Modifying a Target Name
- Managing Q&A Word bookmarks
- Using Table Formula Copy and Define Criteria features
- Including a total using Equation Editor
- Creating rules using Document Rule Manager

Combing Q&A Word Functions

- Combining Q&A Word Functions
- Moving data items
- Creating Formula Fields
- Creating a Header and Footer
- Creating a Profit & Loss Statement in MS Word

Merging Documents

- Creating a Data Source File
- Creating a Main Document
- Adding Merge Fields
- Starting the Merge Process
- Removing Merge Fields