

Vision Word v5.1+ for SunSystems

Duration: 1 Day

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

Who Should Attend: Users that need access to analyse and input data held in SunAccount.

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

- Extract reference data into a Word document
- Extract monetary or physical balances
- Creating extract balance formulas
- Drilling down to transactional data
- Creating data selection lists

Course Content – Vision Word v5.1+ for SunSystems

Introduction and Overview

- Logging into Vision word
- Delay login

Reference File Fill

- Defining a reference file fill report
- Understanding the definition form options
- Sorting data
- Saving a setup and document file

Extracting Balances

- Vision Word bookmarks
- Using the table bookmark name manager
- Inserting columns in a table
- Defining an extract balance formula
- Using formula copy
- Formatting Vision Word extractions
- Using equation editor
- Using criteria view to display bookmark values
- Inserting the currently date into a document
- Using a bookmark as filter criteria
- Assigning target names
- Extracting Transactions

Document Rule Manager & Target Filter Rules

- Using document rule manager to create and assign target filter rules
- Non-contiguous filtering using target filter rules
- Controlling the application of target filter rules

Editing Tables

- Using table copy
- Changing filter criteria
- Creating Word bookmarks
- Relative and absolute filter bookmarks

Extracting Miscellaneous Data

- Using reference file link