

Vision XL v6+ for SunSystems

Duration: 2 Days

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

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

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

- Extract reference data into Excel worksheet
- Extract monetary or physical balances
- Creating extract balance formulas
- Creating user defined data items
- Drilling down on data associated with formulas
- Creating format tables
- Using macro builder
- Sending reference details to SunSystems
- Creating a transaction import file
- Using offline formulas

Course Content – Vision XL v6+ for SunSystems

Introduction and Overview

- User Administration
- Customising Vision

Extracting SunSystems Reference Data

- Defining Detail Reports
- Using wildcard Filters
- Defining a Data Link Query
- Automatic Filter Lookup

Extracting Transactions & Balances

- Defining Details Reports to Extract Transactions
- Applying Current Period & Date Override
- Working with Filter Options
- Defining Query Templates
- Using Summary Reports to Extract Balances
- Amending the extract mode
- Creating user defined output items
- Function Launcher
- Creating Format tables
- Defining Hierarchies
- Using Summary Link to Extract Balances
- Performing a drilldown on a balance
- Applying Offline Formulas

Sending Data to SunSystems

- The Layout Identifier
- Understanding database fields
- Selecting ranges of data for import
- Rules of ledger import

Automating & Customising Vision Queries

- Macro Builder Overview
- Using Macro Builder
- Report Designer Overview
- Filtered Columns