## Vision Executive v5.1+ for SunSystems

**Duration:** 1 Day – scheduled on demand

**Prerequisite:** Knowledge of SunSystems concepts.

**Who Should Attend:** Any users who will need to write or maintain Vision Executive reports.

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

- Open Vision Executive
- Create and format workbooks
- Recognise the use of different options in the define criteria definition forms
- Use the drill tree
- Create and extract queries and charts
- Work with workbooks
- Use the drill, expand & breakout functions to analyse data
- Apply filters to extracted data
- Specify a data matrix report
- Save a drill path and drill data
- Create and use preset workbook
- Import data from Excel to Vision Executive

### Please see over page for course content

**Testimonial**

"The entire course structure was excellent and it will be valuable when I design reports at my own job. I can relate the course content to my current job."

### Course Content – Vision Executive v5.1+ for SunSystems

#### *Introduction and Overview*

- Definition and structure of Vision Executive
- Starting Vision Executive
- Creating a workbook and modifying the drill tree window
- Editing and setting workbook properties
- Using Chart Wizard to create a chart
- Formatting & analysing a chart
- Extracting a query, saving and closing the workbook

#### *Extracting and Existing Query & Using Drill Paths*

- Running a report with a retained drill path and drill data
- Saving a drill path & drill maintenance
- Defining multiple drill paths

#### *Data Analysis*

- Analysing transactions
- Further drilldown & expand analysis
- Defining worksheet expand formats

- Defining workbook expand formats & expanding and collapsing rows
- Using breakouts, filter and data matrix analysis
- Creating Excel pivot tables, outputting information

#### *Building and Advance Query*

- Building the query
- Importing an Excel worksheet into Executive
- Adding & editing user defined periods & dates
- Creating a preset workbook
- Inserting pictures and sounds, using criteria colours

#### *Additional Functionality*

- Building an ageing report
- Creating and using hierarchies
- Using the Vision Data Dictionary