Query & Analysis Budget Management v10+ for SunSystems

Duration: 1 Day – scheduled on demand

Prerequisite: Knowledge of SunSystems concepts.
An understanding of your company's budget structure.
Basic knowledge of Microsoft Excel.

**Who Should
Attend:**   Users responsible for budgeting activities within the company.

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

- Use Q&A Budget Management to control the entire budgeting process for your organisation.

Please see over page for course content

Course Content – Q&A Budget Management v10+ SunSystems

Introduction and Overview

- Overview of Q&A Budget Management
- Q&A Budget Management and Q&A XL
- The Q&A Budget Management process flow

Budget Templates and Q&A Executive Reports

- Creating a budget template file
- Creating a budget transfer file
- Q&A Executive reports

Q&A Budget Management Global Settings

- Starting Q&A Budget Management
- Working with the Q&A Budget Management Interface
- Managing Users
- Managing Contacts
- Using Workbook Status Codes
- Selecting a Balance Method

Creating the Budget Structure

- Loading MS Excel templates
- Creating a database profile
- Creating a new budget
- Allocating users to a budget
- Creating a normal budget group & workbook
- Using Workbook Utility Manager
- Managing Budget Security
- Using the Grid View
- Adding Reports and Documents
- Enabling Auditing
- Adding workbook Notes

Working with Budgets

- Dispatching workbooks
- Adding Budget amounts to workbooks
- Receiving and importing workbooks
- Changing the status on a workbook
- Validating workbooks
- Transferring to the Data Warehouse and viewing the data transferred
- Amending data
- Changing Budget version numbers, creating an Budget structure

Additional Tools and Features

- Amending the budget structure
- Creating User Defined fields
- Adding User Defined fields to the budget structure
- Creating and applying budget Filters
- Creating user defined Status codes
- Printing budget details
- Issuing Reminders

Budget Management Administration

- Backing up the budget structure
- Clearing Budget Management data and transactions
- Restoring from backup