

Introduction to Query & Analysis Executive Financials v10+ for SunSystems

Duration: 1 Day

Prerequisite: Knowledge of SunSystems concepts.

Who Should Attend:

New users who need to design or maintain Q&A Executive reports. New and existing users upgrading from Vision Executive v5.

Note: As Q&A Executive 10 and Vision Executive v6 are very similar, Vision XL v6 users with a good working knowledge of the topics listed below may benefit from attending the Q&A Executive Advanced course.

What You Will Learn:

At the completion of this training session participants will be competent in the following:

- Create and format workbooks and worksheets
- Design reports in the Query Definition form
- Use the drill tree
- Extract queries
- Create Query Prompts
- Use the drill down, expand & breakout functions to analyse data
- Save a drill path and drill results
- Print and output Executive results

Course Content – Q&A Executive v10+ Introduction for SunSystems

Introduction and Overview

- Q&A Executive Process
- Working with workbooks and worksheets
- Executive Screen Layout

Creating Query Definitions

- Working in Designer Mode
- Query Definition Types
- Editing the filter criteria of multiple cells using Define Criteria
- Formatting a Report
- Creating Headers & Footers
- Using Criteria View & Defined Settings
- Controlling Extraction Order
- Creating a Summary Profit & Loss statement

Dynamic Queries with Report Prompting

- About Query Prompt Mode
- Creating a Period Prompt

Analysing Query Results

- Analysing data in Extract Mode
- Drilling down on summary formulas
- Using and maintaining Drill Profiles and Drill Paths
- Viewing Active Selection Statistics
- Performing a Transaction and Specialised Drilldown
- Using the Expand and Breakout Analysis feature

Printing & Outputting Files

- Output Methods
- Setting a Print Area
- Outputting to a Printer
- Outputting to Excel