



## product overview

### Highlights

- Complete financial control of your business
- Powerful, flexible reporting across multiple Causeway solutions
- External database access
- Ad hoc, Standardised and custom reports
- Familiar excel interface
- Proactive Alerts

# business intelligence

Next to your people, the information locked inside your IT systems represents one of your most valuable assets. What is your cash position today; what might it be tomorrow; which projects' performance should be triggering alarm bells? The data that gives the answers to all these questions and more is sitting inside your existing IT systems. The challenge is how to turn that data into meaningful information, and the answer is Causeway's Business Intelligence module – Vision.

### The solution

By accessing, analysing and utilising database information of Causeway solutions Vision Enterprise assists you in quickly identifying trends, problems, and opportunities concealed in the financial information of your business and enabling you to make faster, more effective, more informed decisions.

### Vision executive

Ad hoc, customised, or standard reports can be set up quickly and easily to monitor and report on trends, ratios, and other factors directly driving your business. Hierarchies allow non-contiguous codes and code ranges to be combined, creating a code structure that permits very specific data analysis. You can amalgamate databases, existing analysis codes and data types to create a powerful new coding structure. Format Tables enable results to be highlighted depending on the value or context, ensuring critical results are emphasised for appropriate action.


Charts can also be embedded in worksheets and dynamically linked to the data they display to assist interpretation and analysis.

Vision Executive makes it easy to send your report almost anywhere you want, in the most suitable format. Publish your reports to the Web, e-mail them, export them to Microsoft Excel or HTML, or simply send them to print.

### Vision XL

A powerful Report Designer in Vision XL provides flexible reporting formats, including the use of headers, details, subtotals, and footer sections to provide professional looking reports. Vision XL also enables the diverse range of report styles, formats, and printing options available in Excel to be applied to business data.





You can also use search expressions, called Wildcards, in definition forms and dialog boxes, which support pattern matching when aggregating information. Vision XL can be used to access Causeway Financial Management providing comprehensive enterprise reporting utilising the following features:

- Reference File Link provides a dynamic link to Causeway Financial Management reference files.
- Extract Balances enables quantities and values to be dynamically linked to worksheet cells.
- Extract Transactions allows user defined formatted extraction of Causeway Financial Management transactions.
- Use Data Fill to extract summary details and reference master file information from your Causeway Financial Management database into an Excel worksheet.
- Send Data allows information entered in Excel to be transferred to Causeway Financial Management.
- Macro Builder enables the automation of Vision XL tasks.
- Use Data Selector to create and display a dynamic lookup on a single or multi-column range of data in Excel or directly from Causeway Financial Management.
- Perform statistical reporting using extract modes.

## Vision budget management

Vision Budget Management is an innovative and intelligent budget management tool designed to control the entire budget process from your desktop. Vision Budget Management streamlines the budgeting process, delivers control, reduces budget iterations, improves planning, and optimises the use of financial data.

All completed and validated budgets, including any new versions of the budgets, are automatically consolidated. No re-keying is required.

The distribution and control of information can be managed centrally using e-mail for both dispatch and receipt. Status codes help manage the status of individual budget workbooks.

Version control provides for iterative budget development.

Additional features also include:

- Budgets are prepared in Microsoft Excel workbooks, from within Vision Budget Management.
- Budget access and control is provided by only allowing users access to the areas for which they are responsible.
- The Audit Trail tracks each process and amendment to the Budget, Budget Group and workbook.
- Budget notes can be printed or edited from the worksheets in your Budget.
- Filtering allows control of the Budget information displayed.
- User Defined Fields can be attached to Budgets, Budget Groups, and workbooks.
- Other files and documents can be incorporated with your budget, for example Microsoft Word or Vision Executive files.

## Vision alert

Vision Alert is an easy to use, highly flexible means of automating designated reporting tasks, on an Event or time driven basis using automated, conditional responses to specified conditions in Vision reports

Vision Alert allows any number of Tasks to be created that can contain interdependent processes. For example, if a financial limit is exceeded, an Alert is triggered that automatically generates one or more predetermined responses such as printing a report, distributing the report via e-mail, outputting in either HTML for Web browsing, or to a Microsoft Excel file.

Other advanced features include:

- Create multiple Tasks on multiple servers.
- Communicate directly with other applications including Excel and your Vision Digital Dashboard in Microsoft Outlook.
- Remote facilities can be used independently to create, edit, and schedule tasks.
- Using the server-based Vision Alert, a Task can be executed without the client machine running.

## Secure access and control

The Vision Enterprise suite is fully integrated with the security features within Causeway Financial Management, ensuring only authorised users can access sensitive data. Additionally, specify what options are available within Vision Executive and restrict user access to Vision Executive templates in Query mode only.

To find out how Causeway  
can help *your* business  
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