

SunSystems Transfer Desk

the ability to transfer data internally within a SunSystems database
and to transfer data to and from external files

Overview

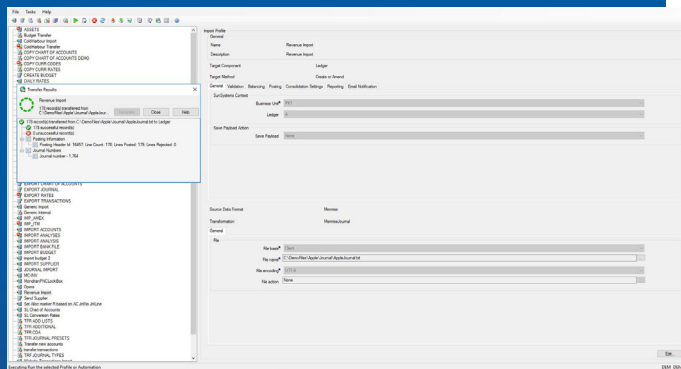
The Transfer Desk function and its associated components are fully web enabled. This means you can access it anywhere with an internet connection and on any device, including tablets and smartphones.

Records can be:

- Created
- Amended
- Deleted
- Closed
- Suspended
- Hidden
- Opened

Formats

- Delimited
- Single Fixed Width Record
- Multi Fixed Width Records
- User XML
- Simple XML



Reference data is read directly to the relevant table whilst transactional data is sent to the “Ledger Import Control Desk” and the user is given the opportunity to validate and report the data before importing to the live table.

Using the Transfer Desk



The full utility is divided into three main areas, these are:

- Transfer Profile
- Transformation Designer
- File Designer

The simplest way to use the utility is using XML. This way, only a “Transfer Profile” needs to be written.

Sometimes, the data needs to be manipulated in some way before arriving at its target, e.g. the account code may be swapped with an analysis code.

This is done using the Transformation Designer and allows every field to be mapped to another field as well as being manipulated in some way if necessary, i.e. the Accounting Period may need to be altered to reflect the Current Period.

If the data is not XML, then the file designer needs to be configured. This allows the user to define exactly the format of the data and the Transformation allows the user to pick up the design and map the fields into the relevant SunSystems fields

Surrounding Functionality

There is functionality that surrounds the Transfer Desk. Rules need to be set on what the user wants to do with the Source data once the routine has been run. So the data can be:

- Copied to a new location
- Renamed and moved to another location
- Deleted
- Left as it is

The Transformation allows Java to be written against fields. A good example of this is the Source Data has the wrong date format. Java can be written to reformat this.

It is possible to write "Lookups" against the data. So it is possible to select a field and tell it if the Source Data falls within a range, then a particular value for that target must be selected.

Automation Desk

Automations are made up of one or more profiles that are run together as one process, in the order you specify using Automation Designer.

An automation consisting of several profiles can be useful in allowing multiple transfer processes to run autonomously. An automation with only one profile can also be useful, for example, to pre-configure any of the runtime parameters set as overridable for the profile.

Automation Designer allows you to:

- Create and edit automations
- Add profiles to an automation
- Define the order in which the profiles are to run within the Automation
- Change overridable runtime parameters
- Store, and load automations

You can also schedule automations to run at a predetermined time using a scheduler program such as NT Scheduler.

Once an automation is created using Automation Designer, it is normally run from within Transfer Desk. However it is also possible to run it from a command line. For example, in Windows, selecting Start >> Run allows you to enter the command. You can use the same command line syntax when setting up a scheduler program such as NT Scheduler to run the automation on a scheduled basis. It can also be used in a Navigator shortcut, in order to run a specific automation directly from SunSystems Navigator.

What are the next steps?

1. Get in touch with FinanSys to schedule a call
2. We will listen to your requirements and discuss how SunSystems can help
3. We will then present you with a tailored demonstration and quotation



Contact us today on +44 (0) 207 456 9833 or info@finansys.com

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