Synergist Spotlight on…

View settings

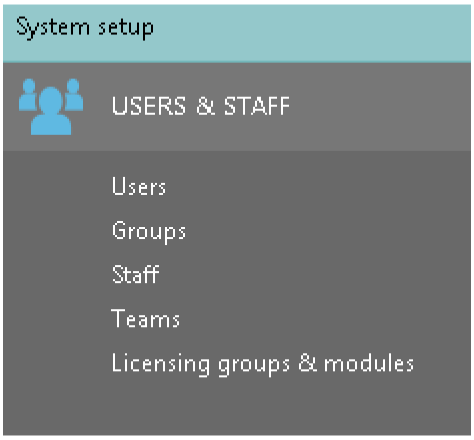
View settings are key to using Synergist. They allow individuals and groups of users to see pre-defined lists or reports. Views can now be created for:

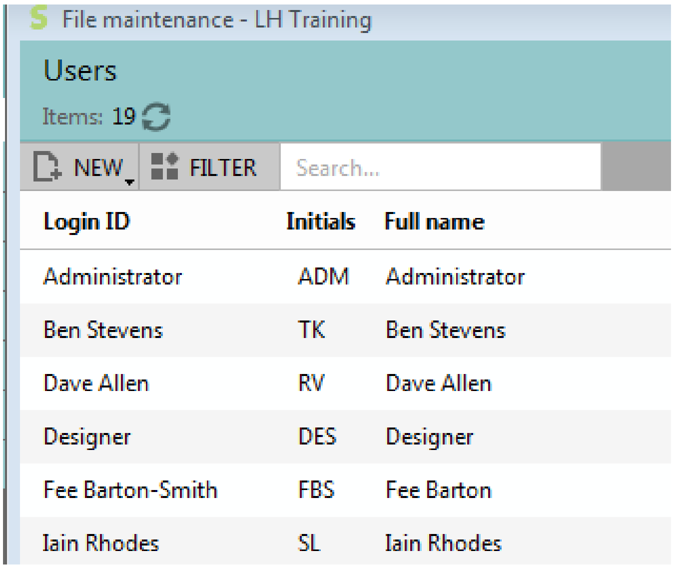
- **User views**
- **Group views**
- **Company views**

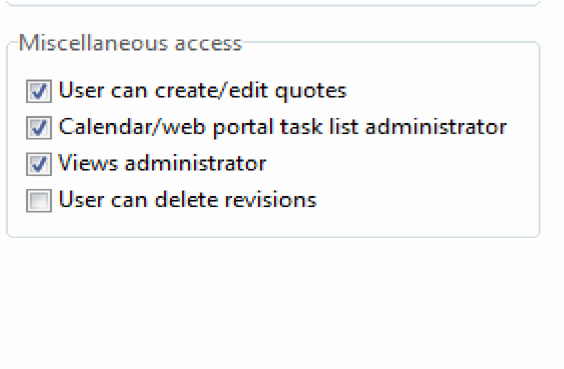
1. Views Administrator

All users have the ability to create their own User Views but you will need to have the permissions to be a "Views Administrator" to create Group and Company Views.

To allow users this ability you will need to mark a User as a "Views Administrator" within their User Record.







Go to File Maintenance, Users & Staff, Users.

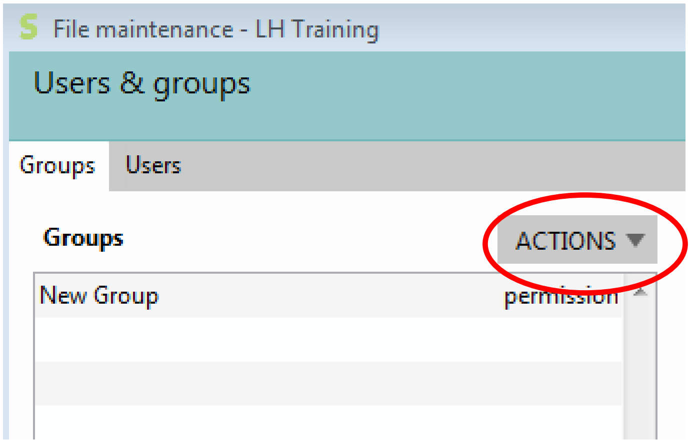
Select a user from the list, go to the Access Tab and tick the Views “Administrator Box”.

This allows the selected user to be able to create/edit and delete views for Users, Groups & Company.

2. Creating Groups

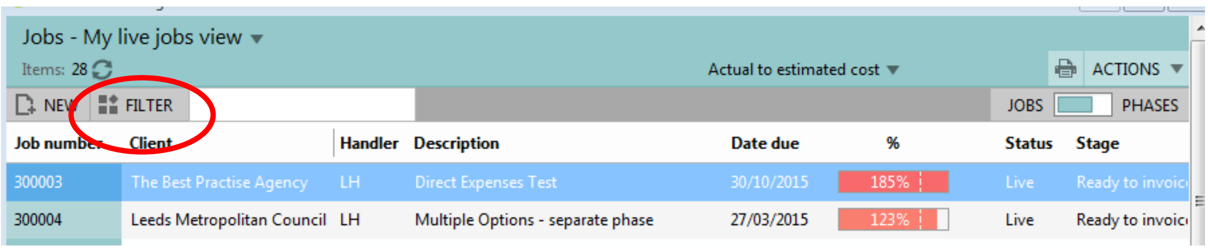
Users can be put into Groups via **File Maintenance & Groups**. Here you can create new groups by clicking on the Actions button.

Groups now provide the ability to define system access rights; standard reports access & groups view settings.

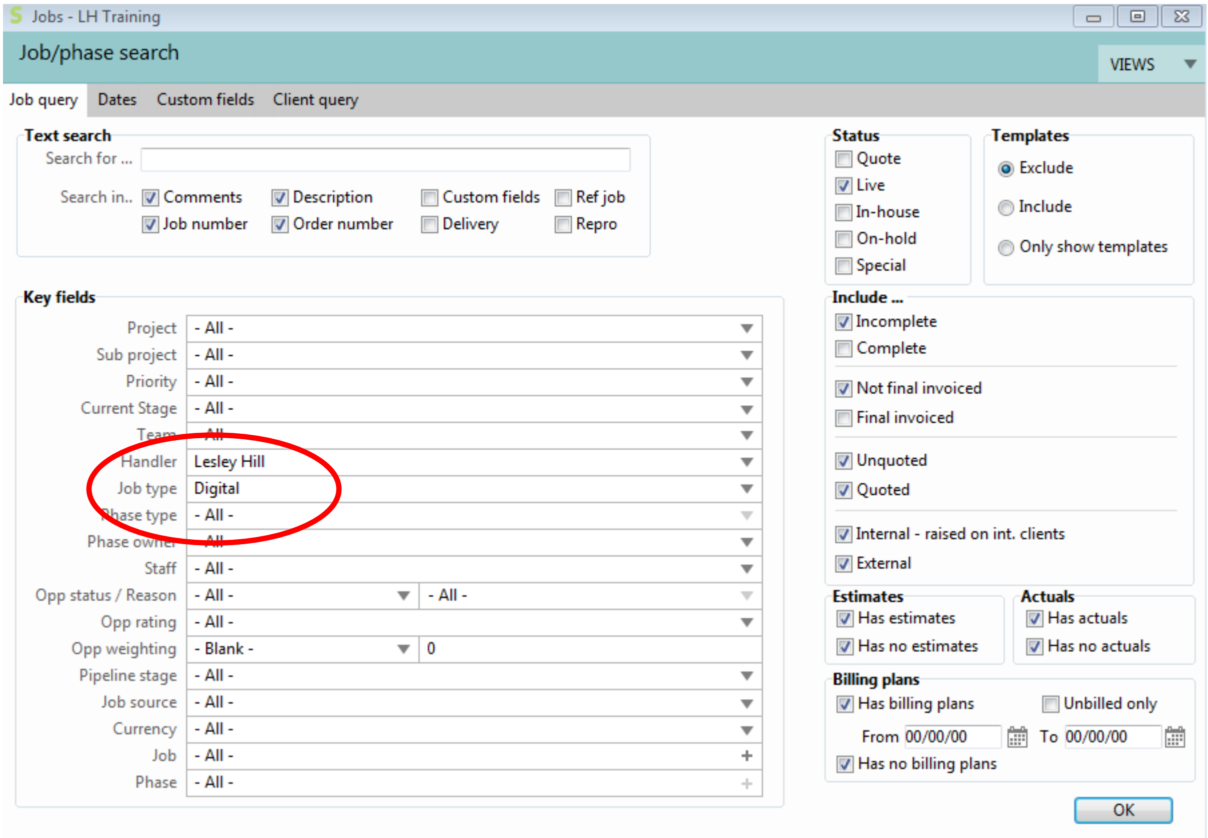


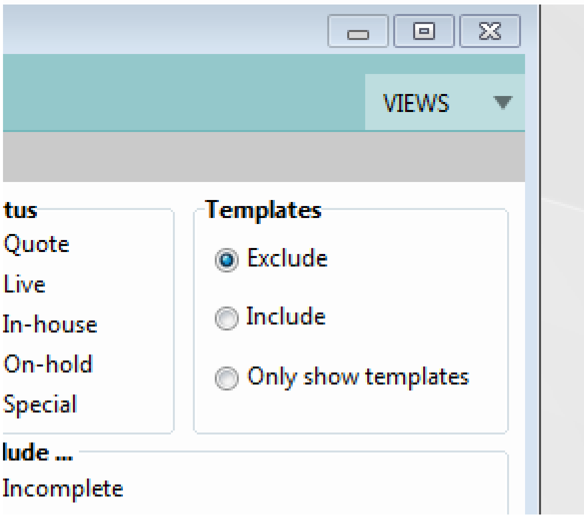
3. Creating a User view

To create a view the user firsts selects the criteria for the view using the Filter Icon found on one of the standard list screens (e.g. jobs. clients etc.)

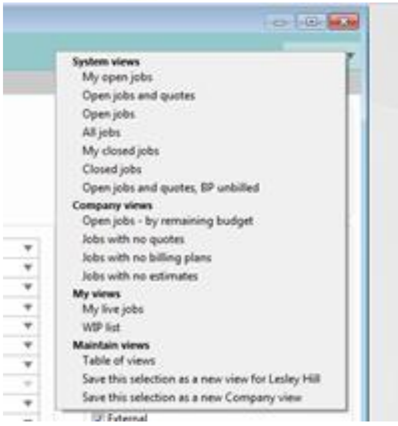


This will open up the advanced search screen and from here you are able to select multiple criteria to create your view. E.g. Live Jobs filtered by Account Handler or all jobs filtered by Job Type.





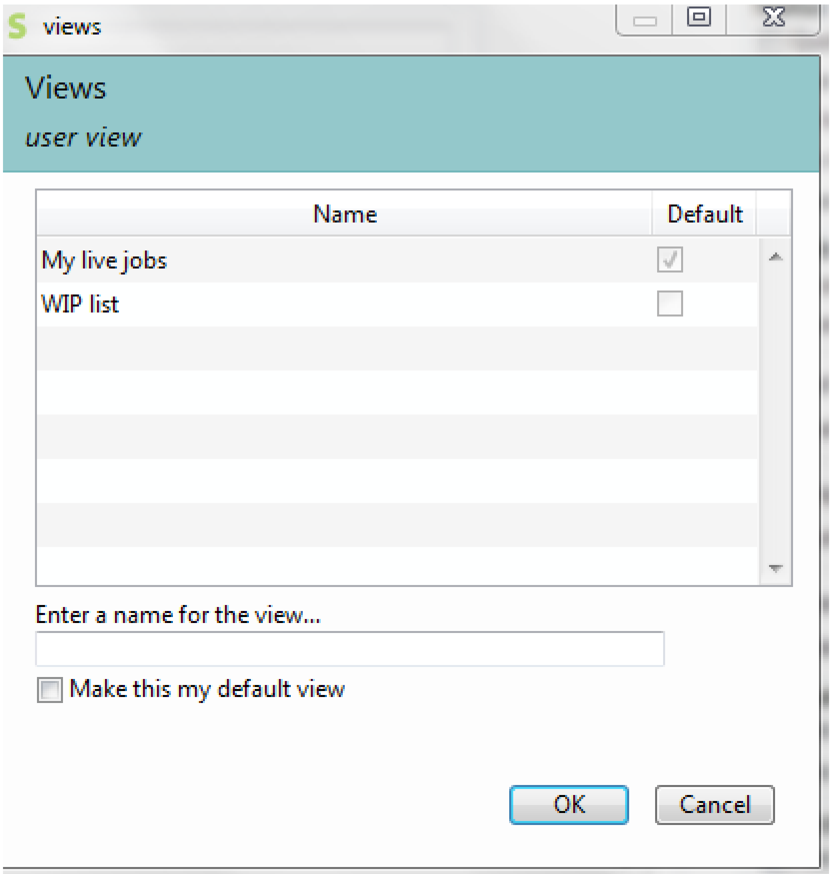
Once you have selected the criteria, you then save this selection to a “view” by clicking the "views" button on the top right of the screen



Under the last heading, **maintain views** you have the option to "Save this selection as a new view for xxxxxx". (This will be the name of the user logged in).

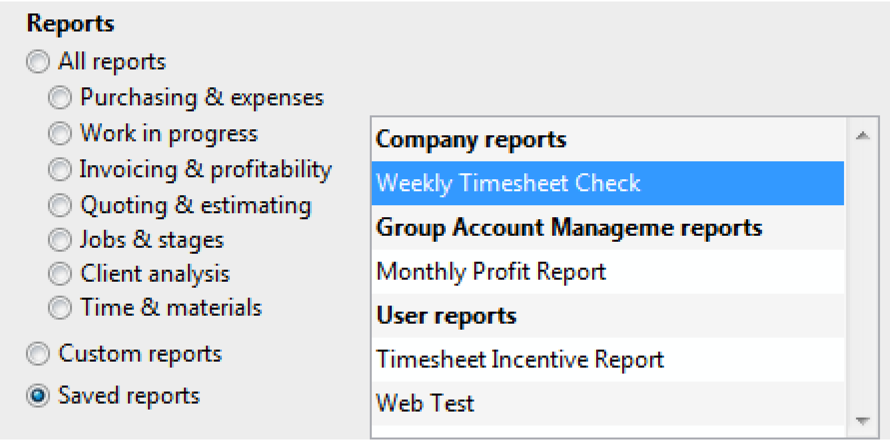
The user can then name the view, it will then be saved under **My Views**.

If the view already exists, it can be overwritten and replaced with the new one.



4. Creating Group and Company Views

Views Administrators can also save a view or reporting setting for themselves, a Group or the Company. All views are now subdivided into these three categories.



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If you wish to further discuss Client Rates within Synergist