



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.

The screenshot shows the Synergist interface. On the left is a sidebar menu under 'System setup' with 'USERS & STAFF' selected, containing options for 'Users', 'Groups', 'Staff', 'Teams', and 'Licensing groups & modules'. The main content area is titled 'File maintenance - LH Training' and displays a 'Users' list with 19 items. The list has columns for 'Login ID', 'Initials', and 'Full name'. Below the list are 'NEW' and 'FILTER' buttons and a search bar.

Login ID	Initials	Full name
Administrator	ADM	Administrator
Ben Stevens	TK	Ben Stevens
Dave Allen	RV	Dave Allen
Designer	DES	Designer
Fee Barton-Smith	FBS	Fee Barton
Iain Rhodes	SL	Iain Rhodes



Miscellaneous access

- User can create/edit quotes
- Calendar/web portal task list administrator
- Views administrator
- User can delete revisions

Go to File Maintenance, Users & Staff, Users.

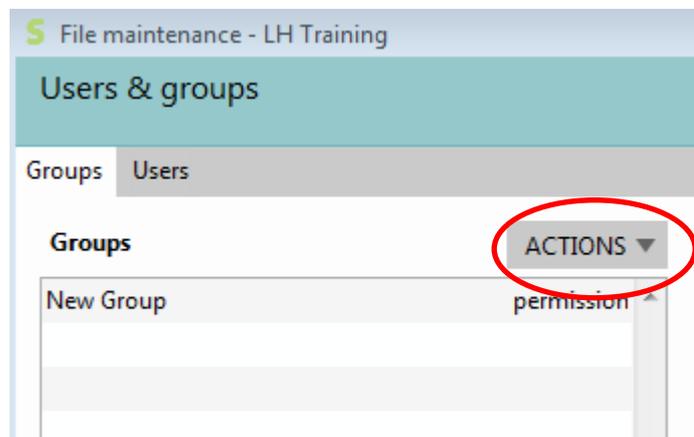
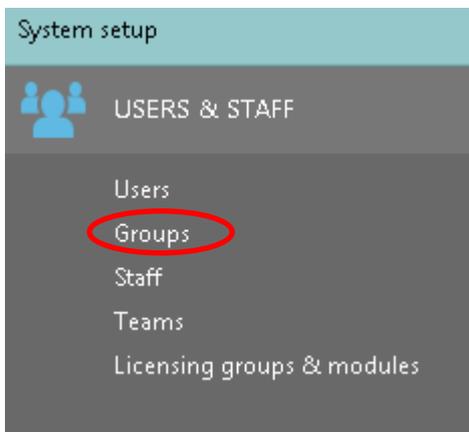
Select a user from the list, go to the Access Tab and tick the Views "Administrator Box".

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

2. Creating Groups

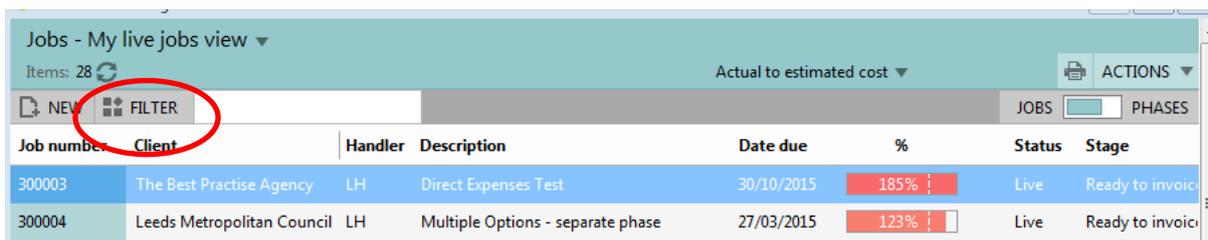
Users can be put into Groups via **File Maintenance & Groups**. Here you can create new groups by clicking on the Actions button.

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.

Jobs - LH Training

Job/phase search

Job query | Dates | Custom fields | Client query

Text search

Search for ...

Search in... Comments Description Custom fields Ref job Job number Order number Delivery Repro

Key fields

Project - All -
Sub project - All -
Priority - All -
Current Stage - All -
Team - All -
Handler **Lesley Hill**
Job type **Digital**
Phase type - All -
Phase owner - All -
Staff - All -
Opp status / Reason - All - - All -
Opp rating - All -
Opp weighting - Blank - 0
Pipeline stage - All -
Job source - All -
Currency - All -
Job - All - +
Phase - All - +

Status

Quote
 Live
 In-house
 On-hold
 Special

Templates

Exclude
 Include
 Only show templates

Include ...

Incomplete
 Complete
 Not final invoiced
 Final invoiced
 Unquoted
 Quoted
 Internal - raised on int. clients
 External

Estimates

Has estimates
 Has no estimates

Actuals

Has actuals
 Has no actuals

Billing plans

Has billing plans Unbilled only
From 00/00/00 To 00/00/00
 Has no billing plans

OK

Views

tus

Quote
Live
In-house
On-hold
Special

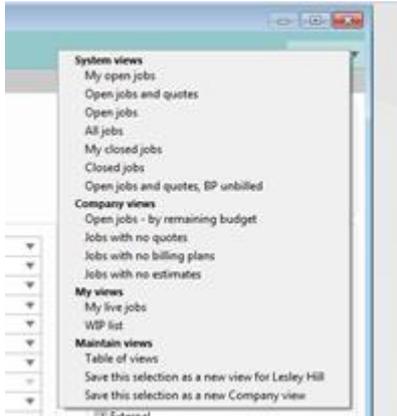
clude ...

Incomplete

Templates

Exclude
 Include
 Only show templates

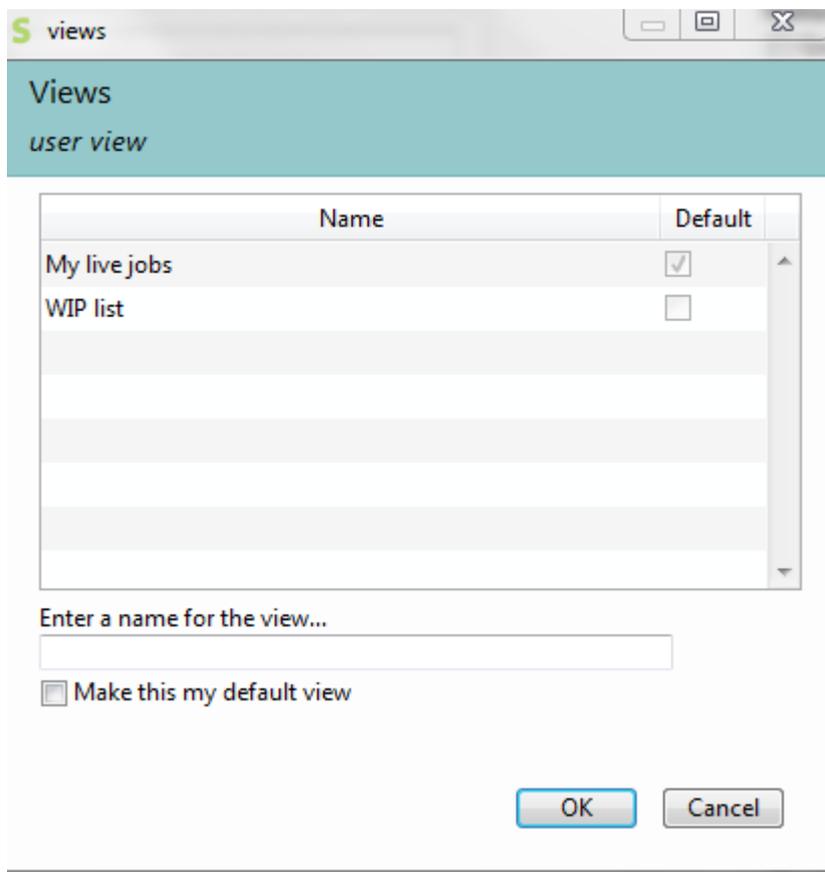
Once you have selected the criteria, you then save this selection to a "view" by clicking the "views" button on the top right of the screen



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.



Reports

- All reports
- Purchasing & expenses
- Work in progress
- Invoicing & profitability
- Quoting & estimating
- Jobs & stages
- Client analysis
- Time & materials
- Custom reports
- Saved reports

Company reports

Weekly Timesheet Check

Group Account Manageme reports

Monthly Profit Report

User reports

Timesheet Incentive Report

Web Test

Please contact The Agency Works at clientservices@taw.co.uk

Or call us on 01455 553246

If you wish to further discuss Client Rates within Synergist