

# synergist<sup>®</sup>

Version 12.0 - Release Notes

Synergist Web Browser Interface

**Note:** Synergist v12 requires 4D server v13

[Intentionally blank page]

## Contents

<b>SYNERGIST V12.0 RELEASE</b>	<b>4</b>
Overview	4
<b>FEATURE SUMMARY</b>	<b>5</b>
<b>SYNERGIST WEB USER INTERFACE</b>	<b>6</b>
Dashboards:	7
The recent items feature	10
Lists & tables	11
Creating jobs	12
Job financial status	13
Creating a schedule - Gantt charts	14
Estimating	15
Quoting	16
Invoicing	17
Purchasing	18
<b>TIME &amp; EXPENSES</b>	<b>19</b>
<b>REPORTING</b>	<b>21</b>
<b>SCHEDULING</b>	<b>23</b>
<b>SETTINGS &amp; FILE MAINTENANCE</b>	<b>24</b>
<b>FEATURE SET OF SYNERGIST WEB</b>	<b>26</b>
<b>DISCONTINUED MODULES</b>	<b>26</b>

## Synergist v12.0 release

---

### Overview

The Synergist 12.0 upgrade is a major new release. It includes a new web browser interface that supports virtually all the core functionality of the desktop product. This new browser (web) interface is available to all users (subject to licencing/access rights).

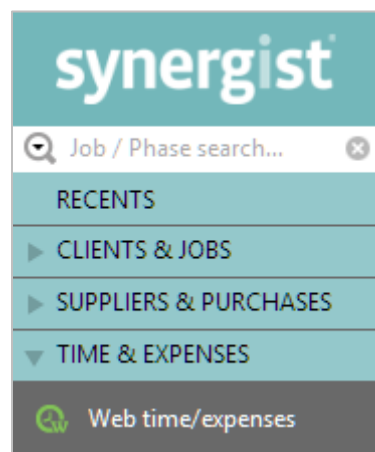
The Desktop application has also seen many new developments. For further information regarding Synergist Desktop see 'Synergist v12.0 release notes - Synergist desktop.pdf'

### Synergist web

Synergist Web interface was previously used primarily for entering time sheets and expenses. With the release of Synergist 12.0 this module can now be used for handling most of the day-day processing that you would normally do using the desktop application.

Synergist Web runs in your web browser. To get access to this system you simply need to enter your Synergist servers address into the browser – if you don't already know this speak to your system administrator.

Or, if you are accessing Synergist Web from within the desktop application, click 'Web time/expenses'



## Feature summary

---

Many of the core features present in the desktop version of the product are now available on the web.

### Dashboards

Synergist Web comes with 3 sets of dashboards. These are designed for management, sales staff, and standard users. Access to the appropriate dashboards is set up in user settings.

### Recent items

Synergist tracks the most recent jobs, clients, and activities that you have opened. A list of these can be left open in a tab facilitate instant access to the items you are working on.

### Clients & Jobs

You can create clients, prospects, opportunities and jobs and set these up to include estimates, quotes, billing plans and invoices.

### Activities

Activities are fully supported including creating follow-ups and adding attachments.

### Gantt charts

Synergist Web supports job level Gantt charts. From the job phases tab you can either view the phases of the job as a simple list or as a sophisticated Gantt chart.

### Reporting module

A selection of key reports is available. These can be filtered in the usual way and printed to PDF or exported. The Reporting module includes the powerful Data Viewer tool.

### Calendar bookings (work scheduling)

The work scheduling feature available in the desktop version has been ported to Synergist Web. All the key features are available including drag & dropping tasks into the calendar, automatic coloring of bookings, draft & tentative bookings, displaying & filtering by team.

### Time & expenses

The Beta version of Time & Expenses is replaced by a new module embedded into the Synergist Web interface. Timesheet users will now have more comprehensive read-only access to all the main features of the product – as well as access to the redesign of Time & Expenses. You can also open Time & Expenses in separate tabs along with the user calendar & dashboard.

### Purchasing module

Suppliers, purchase orders & purchase invoicing can all be accessed & processed from within the purchasing module.

# Synergist Web user interface

## New web interface

The web product has had a complete makeover. All the screens follow a consistent design to make the product intuitive and easy to use. The overall design adheres to concepts you will be used to in the Desktop application so no additional training will be needed. If you are already familiar with the Desktop application you will feel at home with Synergist Web. For those new to Synergist the web version is even easier to navigate.

## Multi-tabbed interface

Just like the desktop application, you can open multiple jobs/clients/quotes etc. However, in the web interface this is achieved using tabs – similar to what you are used to when visiting web sites with your browser. In fact, since elements related to the job (like purchase orders, invoices, quotes etc.) all open in separate tabs, the novice will quickly become confident using the system.

## Data displayed in clear panels

When entering data into a form all the related items are shown grouped into panels. This improves readability.

## Multi-company

The system logs you into your default company. However, if you have more than one company set up (e.g. a training company), you can change the current company to a different one. At that point any new tabs opened open in the newly selected company.

## Synergist Web

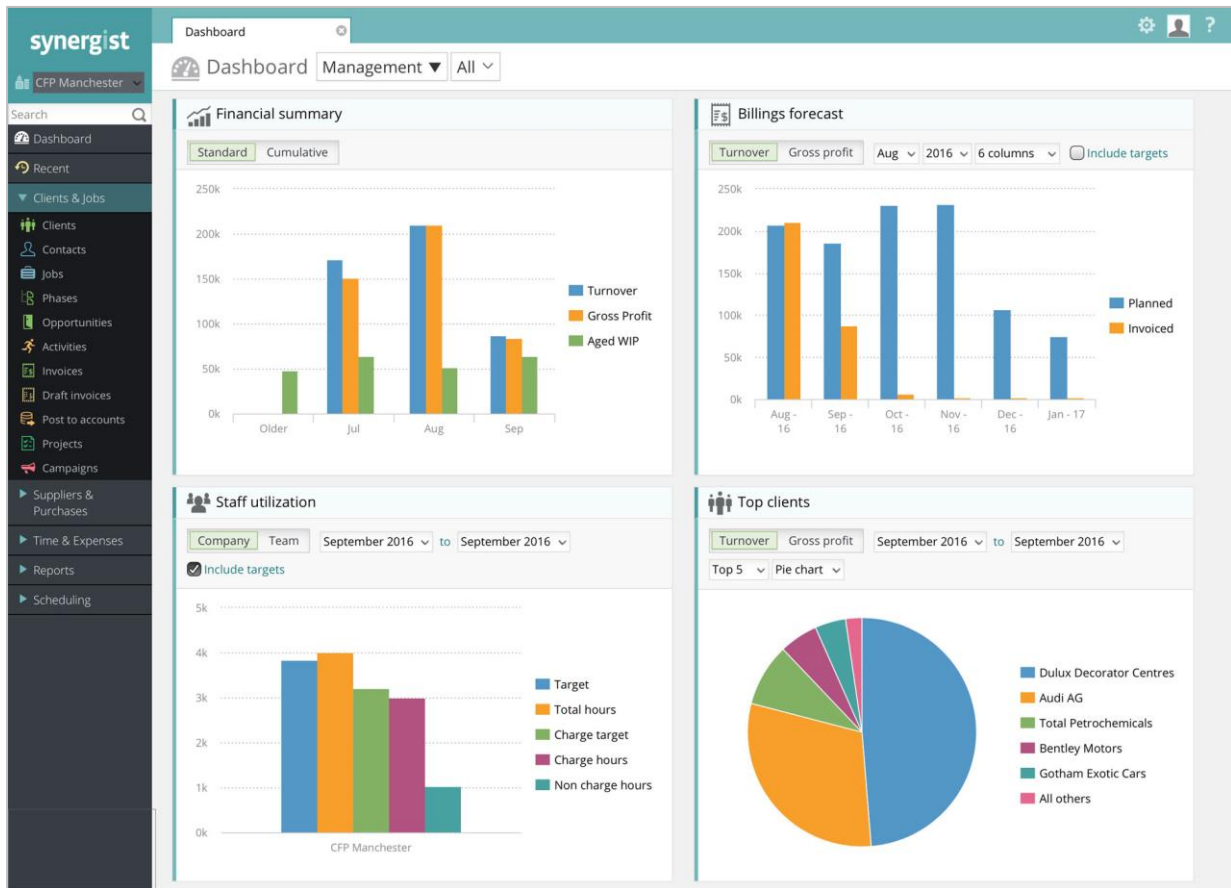
The screenshot displays the Synergist Web interface. On the left is a navigation sidebar with the 'synergist' logo and a menu including 'Marketing & Con', 'Dashboard', 'Recent', 'Clients & Jobs', 'Clients', 'Contacts', 'Jobs', 'Phases', 'Opportunities', 'Activities', 'Invoices', 'Draft Invoices', 'Projects', 'Sub projects', 'Suppliers & Purchases', 'Time & Expenses', 'Reports', and 'Scheduling'. The main content area is titled 'Client list - Active clients' and features a table with columns for 'Client name', 'Phone', 'Handler', 'Web URL', 'Type', and 'Code'. The table lists various clients such as Avondale Foods, Cloggs & Company, and Discovery Centre Museum. At the bottom of the table, it indicates 'Rows per page 15' and 'Items 1-15 of 23'. The top of the interface shows tabs for 'Client list', 'Activities list', and another 'Client list', along with a search bar and a user profile icon.

Client name	Phone	Handler	Web URL	Type	Code
Avondale Foods	0161 406 8786	MP	<a href="http://www.avone1.com">www.avone1.com</a>	Client	1/INVEST
Cloggs & Company	1443 433 23	HK	<a href="http://www.cloggsandco.com">www.cloggsandco.com</a>	Client	1/BL2
Discovery Centre Museum	020 7786 3636	JJ	<a href="http://www.dcm_you.com">www.dcm_you.com</a>	Client	1/PROSPECT
Granada	0171 698 9800	HK	<a href="http://www.granadatry.com">www.granadatry.com</a>	Client	1/GRA
Hienze & co	04225 456 789	HK	<a href="http://www.H123.com">www.H123.com</a>	Client	1/JAY
Hondura	020 3987 723	HK	<a href="http://www.hofurrrr.co.uk">www.hofurrrr.co.uk</a>	Client	1/FS
Hyundai	0114 256 1000	HK	<a href="http://www.Hyundai1.com">www.Hyundai1.com</a>	Client	1/TEST
Jim Beam Ltd	01546 567 455	MP	<a href="http://www.Beameam.com">www.Beameam.com</a>	Client	1/JB
Land Rover	01733 345 476	HK	<a href="http://www.lanland.com">www.lanland.com</a>	Client	1/JOT
Lomac Inc	0171 568 7897	HK	<a href="http://www.Lomac 44.co.uk">www.Lomac 44.co.uk</a>	Client	1/N001
Lotus (stockport)	0161 611 1167	HK	<a href="http://www.lotuselan.co.uk">www.lotuselan.co.uk</a>	Client	1/BLOGGS
Midland Bank	01422 656 766	MP	<a href="http://www.midlandheed.com">www.midlandheed.com</a>	Client	1/M100
Mike Millington - new business	020 1456 457...	MP	<a href="http://www.mimnb.com">www.mimnb.com</a>	Client	1/INT
Mirror Group	020 4566 776	JJ	<a href="http://www.mirrorofworld.com">www.mirrorofworld.com</a>	Client	1/BANK
The Proton Cars plc	0181 765 5678	MP	<a href="http://www.protonxyz.com">www.protonxyz.com</a>	Client	1/A001

## Dashboards:

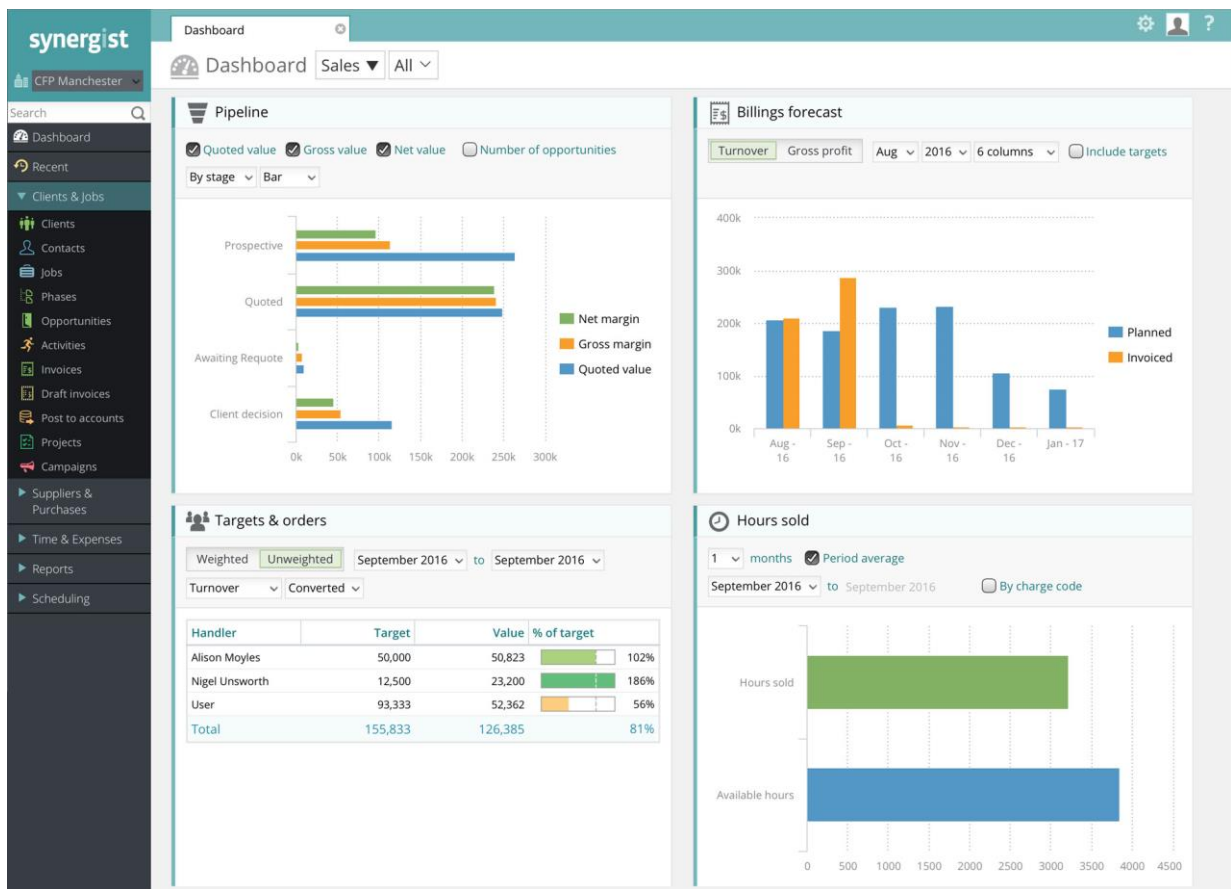
### Management dashboard

This set of dashboards provide a crucial set of metrics required for running the business. This includes a financial summary displaying turnover, profit & WIP. Also included are a billings forecast – planned & actual, and a staff utilization chart.



## Sales dashboard

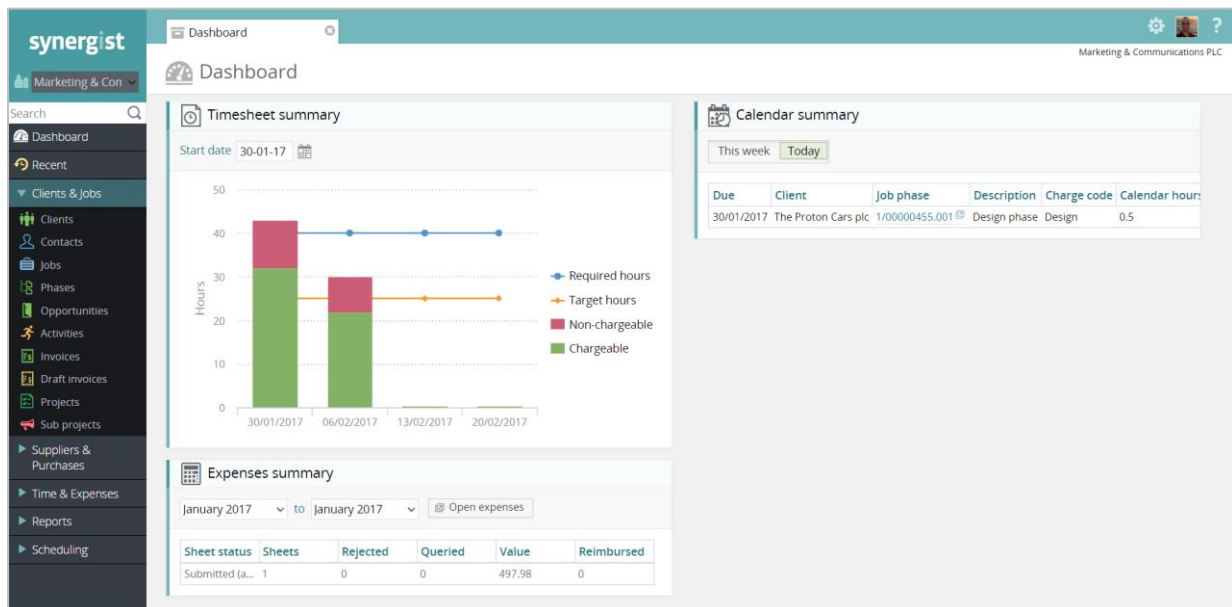
This dashboard displays the sales pipeline and billing forecasts along with other key sales related charts.





## Personal dashboard

All users have access to a 'Personal' dashboard. By default this dashboard opens up automatically when a user logs in. This gives members of staff immediate visibility of time sheets, expenses, and calendar bookings. Since it's common practice to have targets for chargeable and non-chargeable hours, this dashboard is a valuable tool for ensuring timesheets are entered in a timely manner and that staff are mindful of their daily responsibilities.



## The recent items feature

Every time you access a job / phase / client / activity etc. the system tracks your movements. A list of these items will appear in the 'Recent' section. You can have a tab of recent items constantly open if you wish. This is updated in real time and can be used to quickly find that job you were previously working on.

The screenshot displays the Synergist web interface. The top navigation bar includes the 'synergist' logo, a search bar, and tabs for 'Recent list' and 'Client list'. The left sidebar contains a navigation menu with options like Dashboard, Recent, Clients & Jobs, Clients, Contacts, Jobs, Phases, Opportunities, Activities, Invoices, Draft Invoices, Projects, Sub projects, Suppliers & Purchases, Time & Expenses, Reports, and Scheduling. The main content area is titled 'Recent' and is divided into five sections:

- Jobs:**
  - 591 - Mike Milin - Web Design - initial spec
  - 611 - Hienze & c - Stand at Opympia
  - 588 - Hyundai - HTML & CSS review
  - 594 - Hondura - PR - fee job
  - 601 - Royal Carr - Summer campaign
- Phases:**
  - 611.A01 - Hienze & c - Stand at Opympia
  - 464.000 - Granada - TV - web
  - 464.001 - Granada - Television Advertisement
  - 588.005 - Hyundai - HTML & CSS review new phase
- Opportunities:**
  - 634 - Granada - Job template - schedule
  - 636 - Hienze & c - Brochure design
  - 464 - Granada - Television Advertisement
  - 639 - Granada - New web page design
  - 593 - Hondura - PR Fee jobx
  - 635 - Hienze & c - Fashion week web site re-design
- Clients:**
  - Mirror Group
  - Jim Beam Ltd
  - Lomac Inc
  - Hyundai
  - Lotus (stockport)
  - Hondura
- Prospects:**
  - GenCorp
  - FORD
  - DSM
  - Dremes cars
  - Corvette
  - Corporate Car Club

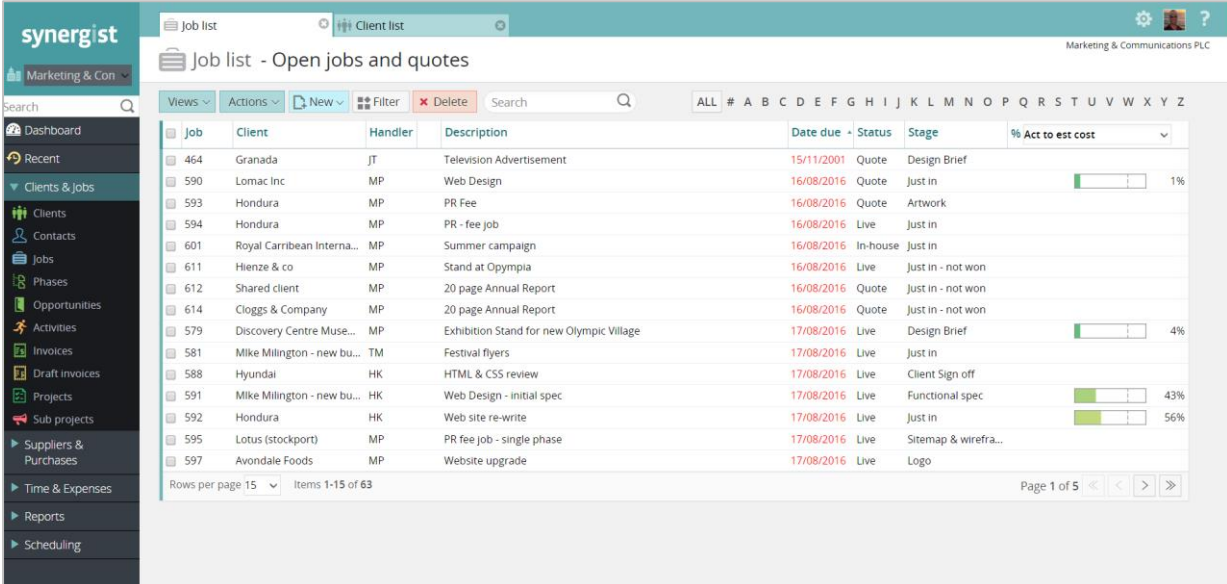
At the bottom right of the main content area, there is an 'Activities' section with a list of tasks:

- To Do - Ward Home - Filing task
- To Do - Hondura - Arrange meeting
- Requisition - Granada - Jim Riley - Team creative - needs some work
- Meeting - Re New logo
- To Do - Granada -
- To Do - Ward Home - Contact report 2/3/01

## Lists & tables

All the main lists in Synergist have a similar look & feel. The user can access the information required by simply selecting a pre-set view, or by filtering the data, or by typing in a search term or using the convenient A-Z search feature.

Here is an example of the job list.



The screenshot displays the Synergist web interface for a job list. The interface includes a sidebar with navigation options like Dashboard, Recent, Clients & Jobs, and various project management tools. The main content area shows a table titled 'Job list - Open jobs and quotes'. The table has columns for Job ID, Client, Handler, Description, Date due, Status, Stage, and % Act to est cost. The data is sorted by date due, with the most recent jobs at the bottom. The table also includes a search bar, filter options, and pagination controls.

Job	Client	Handler	Description	Date due	Status	Stage	% Act to est cost
464	Granada	JT	Television Advertisement	15/11/2001	Quote	Design Brief	
590	Lomac Inc	MP	Web Design	16/08/2016	Quote	Just in	1%
593	Hondura	MP	PR Fee	16/08/2016	Quote	Artwork	
594	Hondura	MP	PR - fee job	16/08/2016	Live	Just in	
601	Royal Carribean Interna...	MP	Summer campaign	16/08/2016	In-house	Just in	
611	Hienze & co	MP	Stand at Opympia	16/08/2016	Live	Just in - not won	
612	Shared client	MP	20 page Annual Report	16/08/2016	Quote	Just in - not won	
614	Cloggs & Company	MP	20 page Annual Report	16/08/2016	Quote	Just in - not won	
579	Discovery Centre Muse...	MP	Exhibition Stand for new Olympic Village	17/08/2016	Live	Design Brief	4%
581	Mike Millington - new bu...	TM	Festival flyers	17/08/2016	Live	Just in	
588	Hyundai	HK	HTML & CSS review	17/08/2016	Live	Client Sign off	
591	Mike Millington - new bu...	HK	Web Design - initial spec	17/08/2016	Live	Functional spec	43%
592	Hondura	HK	Web site re-write	17/08/2016	Live	Just in	56%
595	Lotus (stockport)	MP	PR fee job - single phase	17/08/2016	Live	Sitemap & wirefra...	
597	Avondale Foods	MP	Website upgrade	17/08/2016	Live	Logo	

## Creating jobs

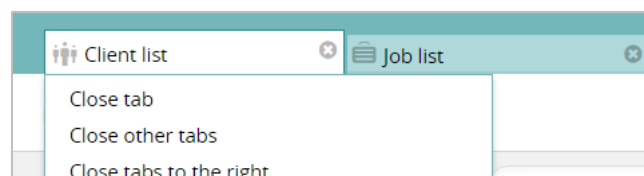
All the input forms in synergist have a similar look and feel with key information grouped into panels for ease of job creation / data entry, and to give a clear structure that is easy to read at a glance.

E.g.

The input form for jobs / opportunities is similar to what you are used to seeing in the desktop product. However, there are some differences. Some of the tabs have been re-designed for ease of use. For example, instead of replacing the job/phase UI when creating documents like purchase orders, quick estimates, quotations etc., Synergist Web will open a new tab – which keeps the interface tidy and means you can have several documents open simultaneously.

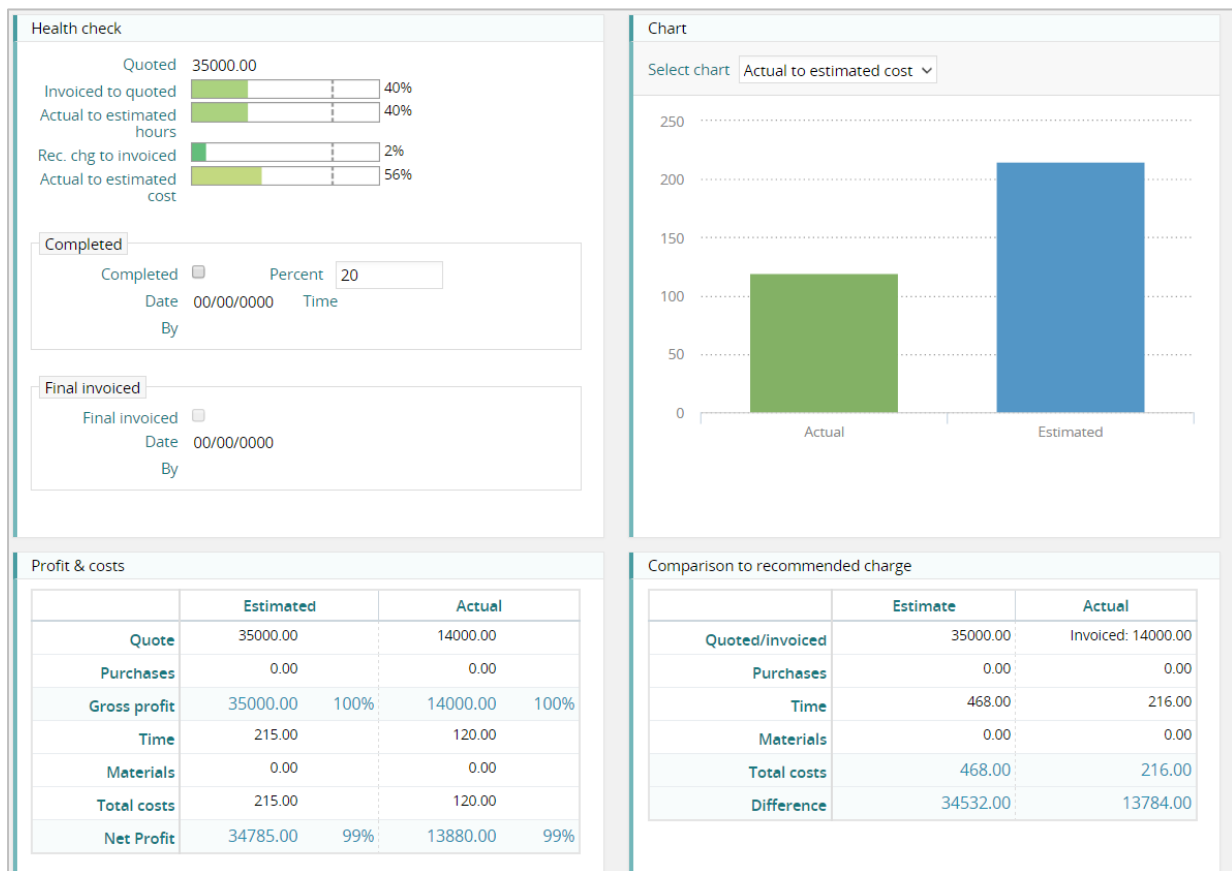
The screenshot displays the Synergist web interface. At the top, there are three tabs: 'Client list', 'Job list', and 'Opp. 590'. The main header shows 'Marketing & Con' and 'Opportunity Web Design'. Below the header, there are buttons for 'Print', 'Opp Actions', 'Cancel', and 'Save & Close'. The main content area is divided into several sections: 'Description' (Title: Web Design, Comments: Analyse client's current web site and create a new design), 'Key dates' (Expected close: 18-01-17, Job start: 03-01-17, Job due: 16-05-17), 'Sales info' (Quoted: 5000.00, Order no: 5543467, Currency: US Dollar, Rate: 1.6800, Bill by: Quote/Estimate), 'Status' (Status: Quote, Job type: Website Design, Current Stage, Priority: High, Project: Website project, Sub project: - Blank -, Ref. job), 'People' (Contact: Alan Smith, Handler: Mike Millington, Team: Creatives), and 'Job custom fields' (Special department: Department 1, Special items: SEO). A left sidebar contains navigation options like Dashboard, Recent, Clients & Jobs, Clients, Contacts, Jobs, Phases, Opportunities, Activities, Invoices, Draft invoices, Projects, Sub projects, Suppliers & Purchases, Time & Expenses, Reports, and Scheduling.

Hint: if you are finding you have too many tabs open it is easy to close a selection of them. Just right click one of the tabs and select an action.



## Job financial status

The financial tab gives you everything you need, at a glance, to see how a job or phase of a job is performing. Several charts are now provided, with bar charts showing job progress metrics and a large column chart which defaults to showing actual costs against estimated costs.



## Creating a schedule – Gantt charts

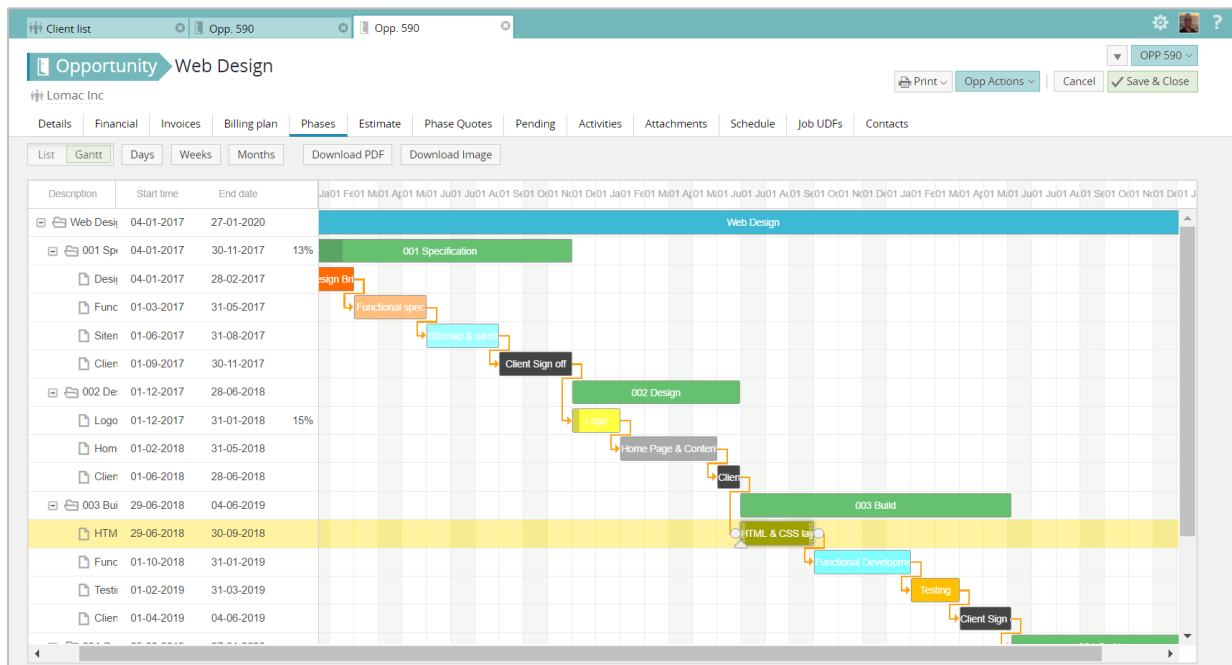
### Gantt charts

Synergist Web supports job level Gantt charts. From the job phases tab you can either view the phases of the job as a simple list or as a sophisticated Gantt chart.

If you are using stages as well as phases, and have your system set up to be 'Stage driven' you can create detailed project plans for each job. Dependencies are also supported – allowing the user to automatically adjust the future plan by moving / resizing preceding tasks.\*

Three different Gantt views are available – Day, Week, & Month and Gantt charts can be downloaded for printing.

### Selecting the Gantt view



\*Note. Dependencies are not supported in the Desktop version of Synergist

## Estimating

Estimating has never been easier. If you are using the 2 tier option (breaking your estimate into stages), you can now create these directly from the estimate tab. Typically you will then use the 'Quick estimate' feature to create a group of tasks required for the Phase / stage.

Description	Qty	Units	Charge rate	Recommended charge
Web programming	0	hours	70.00	
New Business	0	hours		
Creative Design	5	days	700.00	3500.00
Artwork	0	hours	40.00	
Design	18	hours	60.00	1080.00
Copy Writing	0	hours	70.00	
Administration	0	hours		
Amends	0	hours	30.00	
Employee Training	0	hours		
MAC Work	0	hours	50.00	

## Estimate summary

Description	Units		Cost		Charge		Profit	Staff	P	Q	Opt
	Estimated	Actual	Estimated	Actual	Estimated	Actual	Estimated				
<b>Specification</b>											
<b>Design Brief</b>											
- Creative Design	40.00		600.00		4000.00		3400.00				x
- Design	18.00		270.00		1080.00		810.00				x
<b>Functional spec</b>											
- Web programming	7.00		210.00		490.00		280.00				x
- Creative Design	48.00		720.00		4800.00		4080.00				x
- Design	9.00		135.00		540.00		405.00				x
<b>Sitemap &amp; wireframe</b>											
- Design	9.00		135.00		540.00		405.00				x
- Design	4.00		60.00	15.00	240.00		180.00	1/KAT			
<b>Client Sign off</b>											
- Administration	5.00		45.00				-45.00				x
<b>Totals</b>	<b>140.00</b>	<b>0.00</b>	<b>2175.00</b>	<b>15.00</b>	<b>11690.00</b>	<b>0.00</b>	<b>9515.00</b>	<b>(81%)</b>			
<b>Gross Estimated Profit</b>							<b>11690.00</b>	<b>(100%)</b>			

## Quoting

Once you have set up a budget by creating an estimate to track costs, you will be ready to generate a quotation for your customer.

Synergist Web supports many of the advanced quoting features that we see in the desktop version of the product, e.g. line formatting, quote options, quote discounts and the ability to build different versions of the quote defined by pre-set quote views.

Each quote line can be expanded to add additional notes, and you can drag and drop the quote lines to easily reorder the document.

Description	Quantity	Unit price	% Discount	Value	Style
<b>Design Brief</b>	0	0.00	0.00	0.00	B i U
- Creative Design We will meet and discuss your initial ideas prior to starting this process	40	168.00	0.00	6720.00	B i U
- Design	18	100.80	0.00	1814.40	B i U
<b>Functional spec</b>	0	0.00	0.00	0.00	B i U
- Web programming	7	117.60	0.00	823.20	B i U
- Creative Design	48	168.00	0.00	8064.00	B i U
- Design	9	100.80	0.00	907.20	B i U
<b>Sitemap &amp; wireframe</b>	0	0.00	0.00	0.00	B i U
- Design	9	100.80	0.00	907.20	B i U
- Design	4	100.80	0.00	403.20	B i U
Client Sign off	0	0.00	0.00	0.00	B i U
<b>Billable Total</b>				<b>\$19639.20</b>	



## Invoicing

Invoices can be generated based on a quotation, billing plans, job descriptions or just typed in manually. If you have several jobs that need billing on a single invoice this is also possible.

Invoice approval is also available in Synergist Web, with the approval status clearly displayed at the top of the invoice. An invoice remains a draft until it has been approved and 'made real'.

The screenshot shows the Synergist Web interface for creating a draft invoice. At the top, there are navigation tabs: "File maintenance", "Recent list", "Phase 590.001", and "D10149". The main header displays "Draft invoice: D10149" and buttons for "Make Real", "Cancel", and "Save & Close". Below the header, the company name "Lomac Inc" and specification "1/00000590.001 Specification" are shown. The form includes fields for "Type" (set to "Invoice"), "Final" (checkbox), "Inv date" (31-01-17), and "Order number".

The main content area is divided into tabs: "Details", "Content", "Jobs/Phases invoiced", "Allocated costs", "Address", "Notes", and "Phase allocations". The "Details" tab is active, showing a table of invoice items. The table has columns for Description, Quantity, Unit price, Net total, VAT, VAT amount, Gross total, Nominal, and Style. The items listed are:

Description	Quantity	Unit price	Net total	VAT	VAT amount	Gross total	Nominal	Style
<b>Design Brief</b>	0	0.00	0.00	1 (17.5% - S)	0.00	0.00		B i U x
- Creative Design We will meet and discuss your initial ideas prior to starting this process	40	100.00	4000.00	1 (17.5% - S)	700.00	4700.00	1234 Sales of Desig	B i U x
- Design	18	60.00	1080.00	1 (17.5% - S)	189.00	1269.00		B i U x
<b>Functional spec</b>	0	0.00	0.00	1 (17.5% - S)	0.00	0.00		B i U x
- Web programming	7	70.00	490.00	1 (17.5% - S)	85.75	575.75	1235 Sales of Medi	B i U x

## Purchasing

From within a job phase you can create purchase estimates and purchase orders. Once the supplier submits a purchase invoice, it can be entered into the system via the 'Purchase invoices' Interface.

Enhancements have been made to this screen in the Synergist Web version. The unallocated purchase orders now appear directly under the invoice details section. To allocate one or more purchase orders to the invoice just click the 'Allocate' button. The allocated purchase orders then appear below. Once the invoice is fully allocated the list of unallocated purchase orders is automatically hidden. Allocating nominal codes and posting is the same process as is used in the Desktop version.

Purchase invoice: 1/10016

Supplier: Able Printers Limited  
 PIR number: 1/10016  
 Their ref:   
 Invoice  Credit  Write off

Details | Analysis | Notes

Value	
Gross	350.00
Tax	50.00
Net	300.00
Allocated	300.00
Unallocated	0.00

Dates	
Invoice date	31/01/2017
Posting	31/01/2017
Due date	31/01/2017
Created	by Mike Millington on 31/01/2017 at 3:16pm

People

Entered by: Mike Millington  
 Contact: Stephen Vincent  
 Authoriser: Mike Millington

Available purchase orders: [Hide/View available purchase orders](#)

Allocated purchase orders									
Job and phase	Order no	By	Description	PO date	Estimated	Cost	Invoiced	Final Inv	
1/00000603.001	010116	MP	Print	16-10-14	100.00	100.00	100.00	✓	UnAllocate
1/00000603.001	010116	MP	Print 2	16-10-14	200.00	200.00	200.00	✓	UnAllocate

## Time & Expenses

### Weekly timesheet

The weekly timesheet provides an efficient interface to entering timesheets. The user's job list appears on the left hand side of the screen. If work has been allocated to the user via the Calendar Bookings module, the jobs automatically appear in the weekly timesheet at the top of the list. The job, phase & charge code are automatically filled in. All the user needs to do is enter the hours in the table to the right.

There is also a timer feature available that accumulates time automatically while the user is working on a job. This can be paused and restarted so it's a useful tool for staff working on multiple tasks simultaneously.

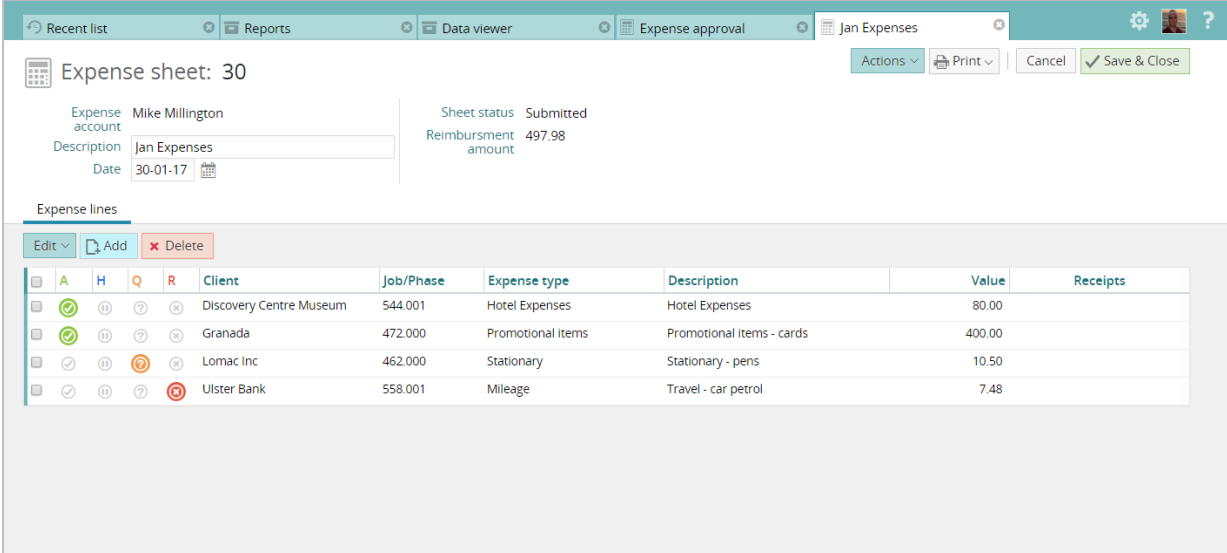
	Client	Job Phase	Stage	Charge code	Post	Post	Post	Post	Post	Post	Post	Total Ho...
					Jan '17	Jan '17	Feb '17	Feb '17	Feb '17	Feb '17	Feb '17	
	The Proton Cars plc	455.001		Design	30 Mon	31 Tue	1 Wed	2 Thu	3 Fri	4 Sat	5 Sun	
	Design of New Car Logo - Design phase								2	3		5
	Ulster Bank	580.006		Administration								0
	Exhibition Stand											0
	Hyundai	588.001	Design Brief	Design								0
	HTML & CSS review - Specification											0
	Granada	464.001		New Business				5	6			11
	Television Advertisement											11
	Lomac Inc	531.001		Design	4	2	2	3	1			12
	Predator Re-launch - POS Material - 4 Page Brochure											12
	Hondura	533.001		Design	2	3	3		2			10
	New Insight Enviromental Grant Scheme FI - Delivery Project											10
	Ward Homes	585.001	Design Brief	Artwork	2	4	4					10
	Web Design - update to main website - Specification											10
	Daily Total Hours				8	9	9	8	11	3	0	48
					Hours required							40
					Chargeable submitted							32
					Non-chargeable submitted							11

**Note:** If you wish to continue to use the older 'Beta' version of the Time and Expenses module you should not upgrade to v12. This module is no longer available once you have upgraded from v11.

## Expense entry & approval

Users can enter expenses and attach receipts as required. Once ready an expense sheet is submitted for approval. Approvers can quickly approve or query expense lines by clicking the color coded icons to the right of each line.

Expense sheets can then either be returned to the submitter (in the case of a query) or posted on the respective jobs.



Expense sheet: 30

Expense account: Mike Millington  
Description: Jan Expenses  
Date: 30-01-17

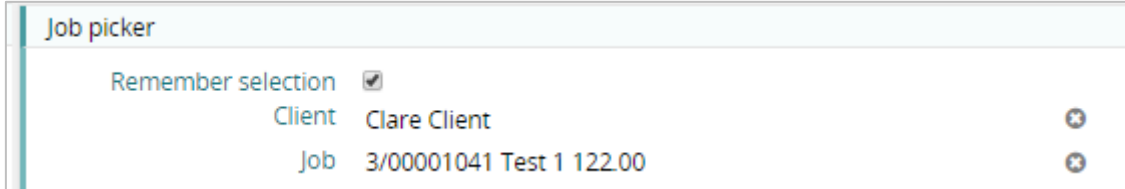
Sheet status: Submitted  
Reimbursement amount: 497.98

Expense lines

	A	H	Q	R	Client	Job/Phase	Expense type	Description	Value	Receipts
	✔	ⓘ	⊙	⊗	Discovery Centre Museum	544.001	Hotel Expenses	Hotel Expenses	80.00	
	✔	ⓘ	⊙	⊗	Granada	472.000	Promotional Items	Promotional items - cards	400.00	
	✔	ⓘ	⊙	⊗	Lomac Inc	462.000	Stationary	Stationary - pens	10.50	
	✔	ⓘ	⊙	⊗	Ulster Bank	558.001	Mileage	Travel - car petrol	7.48	

## Materials entry

Materials are no longer entered using the Weekly Timesheet. Use the daily timesheet for this task. The Daily timesheet feature includes a 'remember selection' option to make it easy to efficiently enter multiple material sheets against a job.



Job picker

Remember selection

Client Clare Client

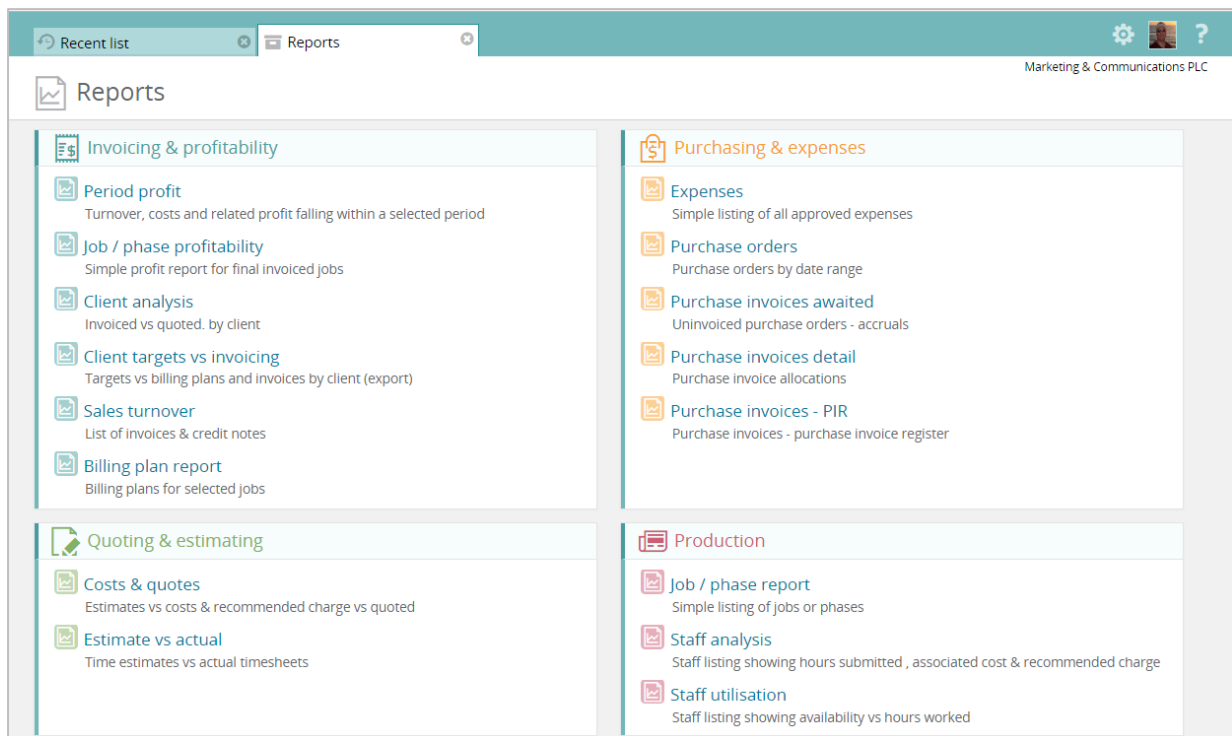
Job 3/00001041 Test 1 122.00

## Reporting

### Standard reports

A selection of key reports is available. These are presented in panels and are grouped together in a similar fashion to the desktop application.

Using this simple interface it is easy to quickly identify a report you wish to run. Once you had selected the report you have options to print (to PDF) or export to csv (Excel), and advanced filtering is available if you require it.



### Data viewer

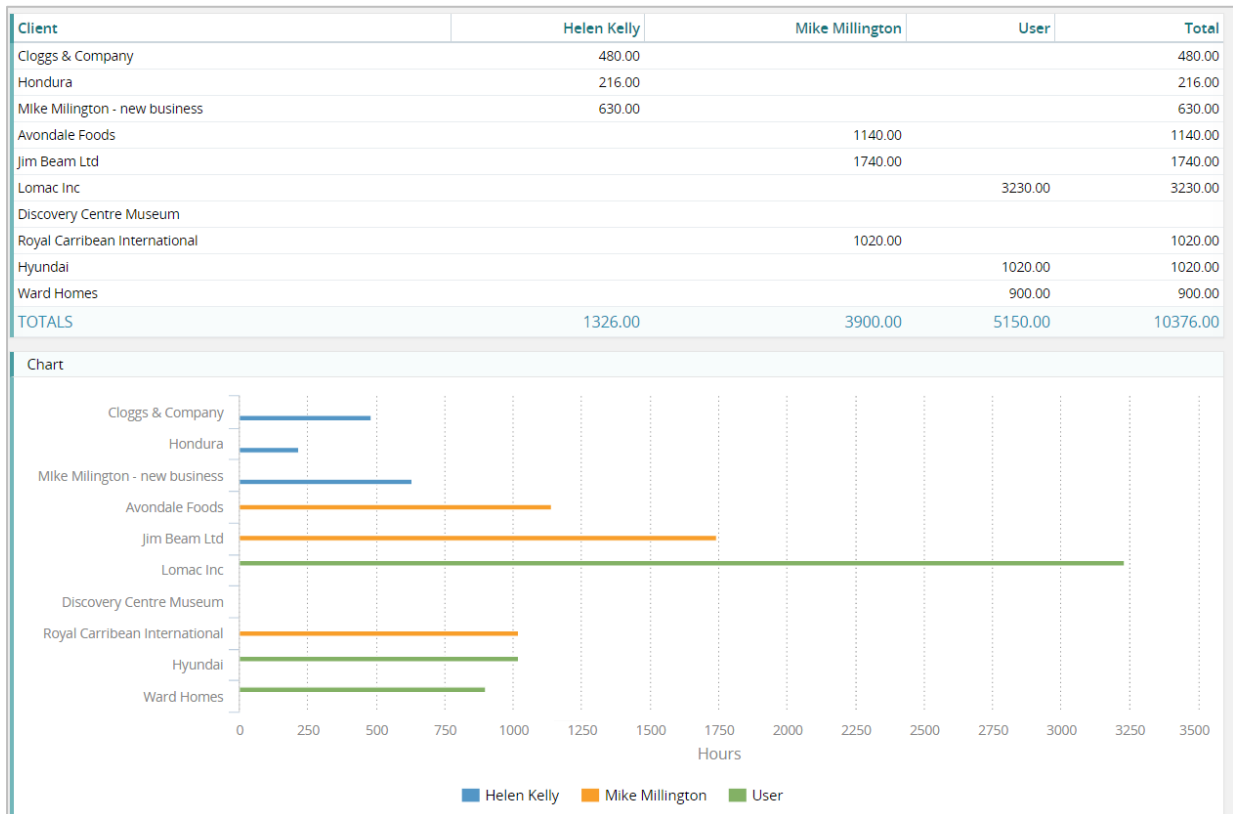
The Data viewer is now also available on the web. This powerful tool has been enhanced to support all key fields in the database (including user defined fields), and now supports multiple data types using separate filters. This means complex data views can be created and saved. There are various output options including 'on screen table', 'chart' & 'export'.

## Example data viewer table & chart

Here is a simple chart listing time (in value) booked to clients over a 3 month period, broken down by staff member. Charts like this can be created in literally seconds.

The screenshot shows the 'Data viewer' configuration screen. It includes sections for 'Selected data types', 'Choose your data columns', 'Selected data columns', and 'Options'. The 'Selected data types' section shows a table with columns 'Data type', 'Options', and 'Name'. The 'Choose your data columns' section shows a dropdown for 'Staff' and a 'Set cross-tab' button. The 'Selected data columns' section shows a table with 'Client' selected. The 'Options' section has radio buttons for 'Show Descriptions' and 'Show Codes', and a checked checkbox for 'Hide zeroes'.

## The output ...



## Scheduling

### Calendar bookings

The scheduling module is a comprehensive work allocation tool. Tasks that are created during the estimating process can be allocated to staff in the master calendar. Tasks are simply drag & dropped into the schedule and can be automatically color-coded. Real, draft & tentative bookings can be made, and the display filtered by team / resource.

Items allocated in the Calendar bookings scheduler will then appear in the user's personal Synergist calendar. These bookings will also appear automatically at the top of a user's weekly timesheet form – for ease of creating timesheets.

Client	Job phase	Description	Charge code	Due date	Estimated	Booked	Remaining
Ulster Bank	1/00000580.006	Exhibition Stand	Creative Design	Fr 31/12/2010	10	0	10
Avondale Foods	1/00000631.002	A4 20pp annual report /Estimating	Creative Design	Fr 17/10/2014	5	0	5
Hondura	1/00000632.001	Conference stands	Creative Design	Tu 21/10/2014	3	0	3
Mirror Group	1/00000584.001	SEO /Specification/Functional spec	Creative Design	Fr 22/07/2011	10	0	10
Mirror Group	1/00000584.001	SEO /Specification/Design Brief	Creative Design	Mo 11/07/2011	10	21	-11
Ward Homes	1/00000585.001	Web Design - update to main website/Spec...	Creative Design	Su 06/11/2011	10	0	10
Ward Homes	1/00000585.001	Web Design - update to main website/Spec...	Creative Design	Mo 31/10/2011	100	0	100

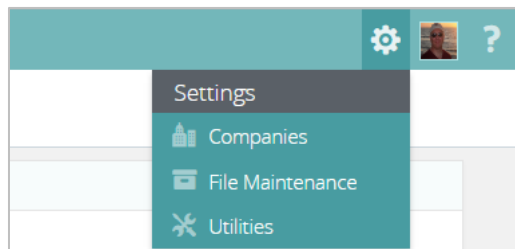
Features in the desktop version not supported in web

Although the web version of the calendar bookings system has a comprehensive set of features, there are some options that have been omitted from this initial release.

- Tree view
- Task date indicators
- On calendar filters
- Spread loading
- Copy and paste / paste special
- Requisitions
- Auto refresh
- Ticking off booked items

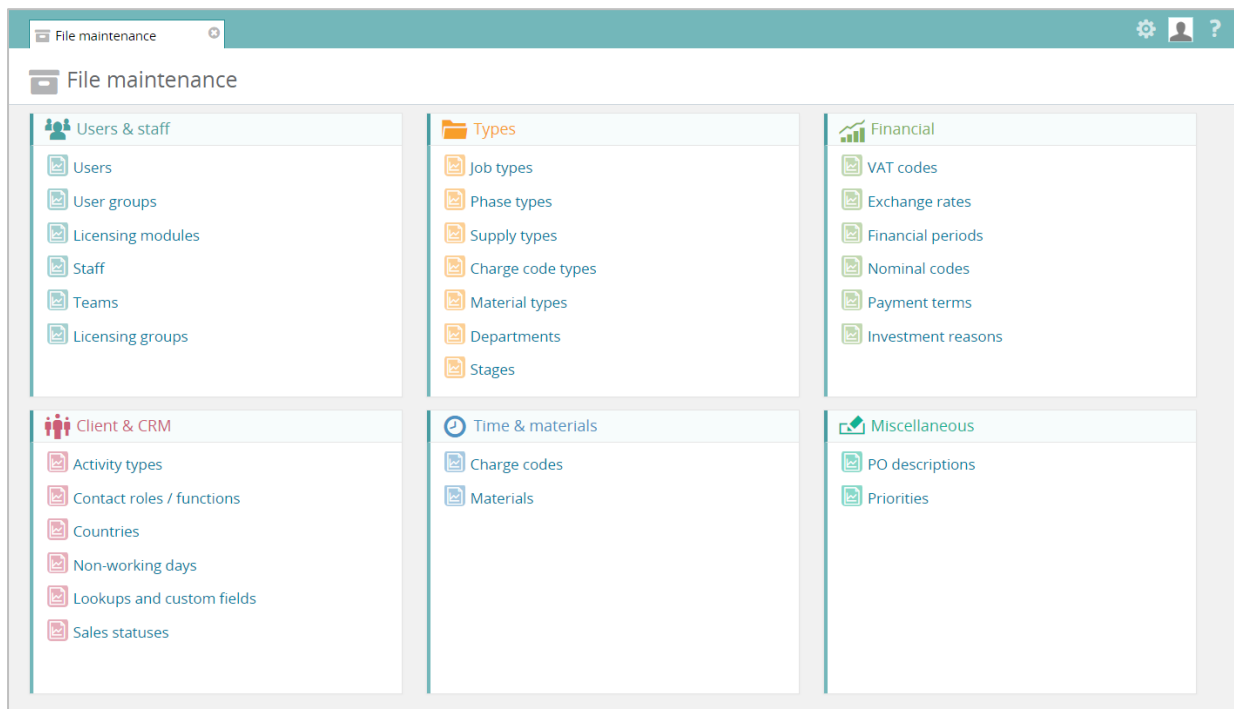
# Settings & file maintenance

Access to Company settings, File maintenance & utilities is found in the right top corner of the screen (subject to access rights)



## File maintenance

New users can be created and changes made to validation tables in this section. See synergist help for more information about this section of the product.





## External access to Synergist

Since Synergist Web runs in a browser it is possible to access your Synergist system from anywhere in the world. However, this is only possible if your server is configured to allow access from outside of your local network. In order to set this up have a word with your IT manager or Synergist system administrator.

## Synergist Cloud

This is a service we are providing which will allow you to relocate your Synergist server from your local infrastructure to an externally hosted environment that we maintain (The Synergist Cloud). Synergist customers with on premise systems who wish to transfer into the cloud will be able to do so. However, the first step in this process is to upgrade to Synergist v12 and establish that the new browser interface provides all the functionality required, as migrating to our cloud offering involves relinquishing the desktop interface. We will be providing further details of the migration option following the roll out of v12.

## Feature set of Synergist Web

---

Although Synergist web supports the core Synergist features, it is not as comprehensive in its functionality as the desktop application. Here is a link to a document that outlines the main differences:

<https://synergist.co.uk/synergist-v120-comparison-of-desktop-vs-browser-interface-functionality>

## Discontinued modules

---

The MyTasks module (available in Synergist v11) has been discontinued in the v12 release. If you are relying on this module it is important not to upgrade to v12 without first contacting your Synergist representative to discuss the alternative work scheduling tools included in v12.