Synergist Spotlight on…

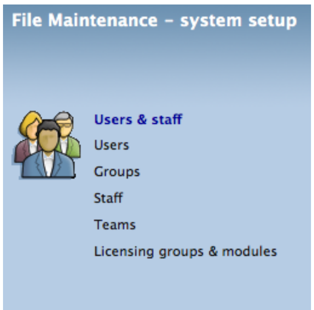
View settings

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:

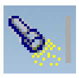
- User views
- Group views
- Company views

1. **Mark a User as a 'Views Administrator'**
    - Go to '**File maintenance', 'Users'** and the **'Access tab'** to switch on a user as a **'views administrator'**. This allows the selected user to be able to create/edit and delete views for Users, Groups & Company.

2. **Create Groups**
    - Users can be put into Groups via **File Maintenance & Groups**. Groups now provide the ability to define system access rights, standard reports access & groups view settings.

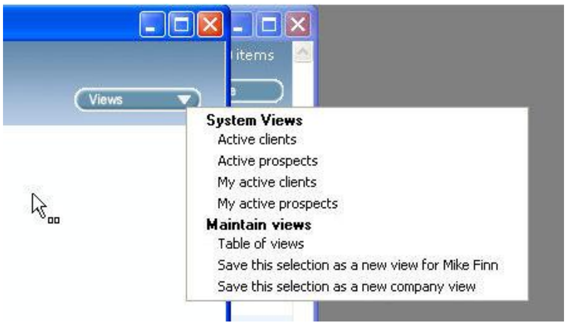


3. **Creating a User view**
    - To create a view the user firsts selects the criteria for the view using the torch icon found on one of the standard list screens (e.g. jobs. clients etc)
      This will open up the advanced search screen.

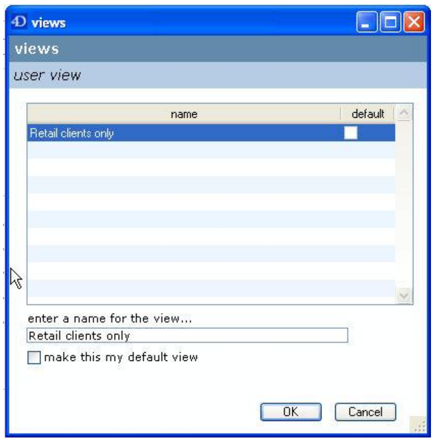


    - Select multiple criteria for your search view e.g. **Live Jobs** filtered by Account Handler or all jobs filtered by **Job Type**.

- The user would then save this selection to a view by clicking the **"views"** button on the left of the screen, and selecting **"Save this selection as a new view".**



- The user can then name the view. If the view already exists, the view can be overwritten and replaced with the new one.



4. 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.