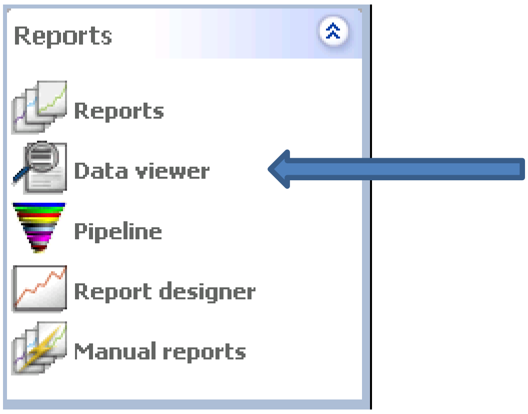
Synergist Spotlight on……

The Data Viewer

Synergist comes with a useful reporting tool called the **Data Viewer**. This tool enables you to analyse your data and display a variety of views.

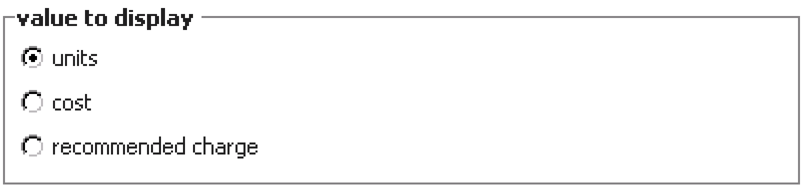
Access the Data Viewer from the main **Reports** toolbar menu, and then click on the Data Viewer icon.



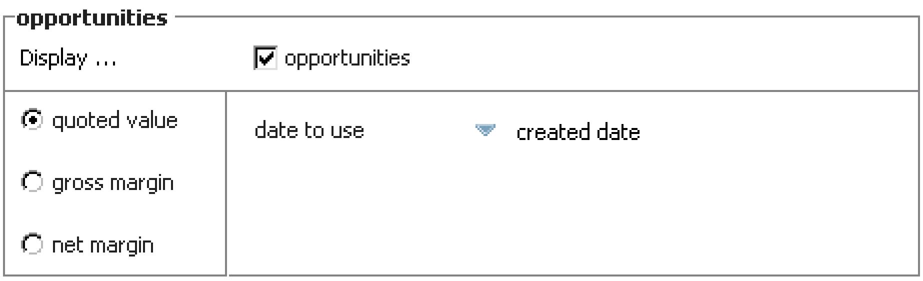
1. Display Options Tab

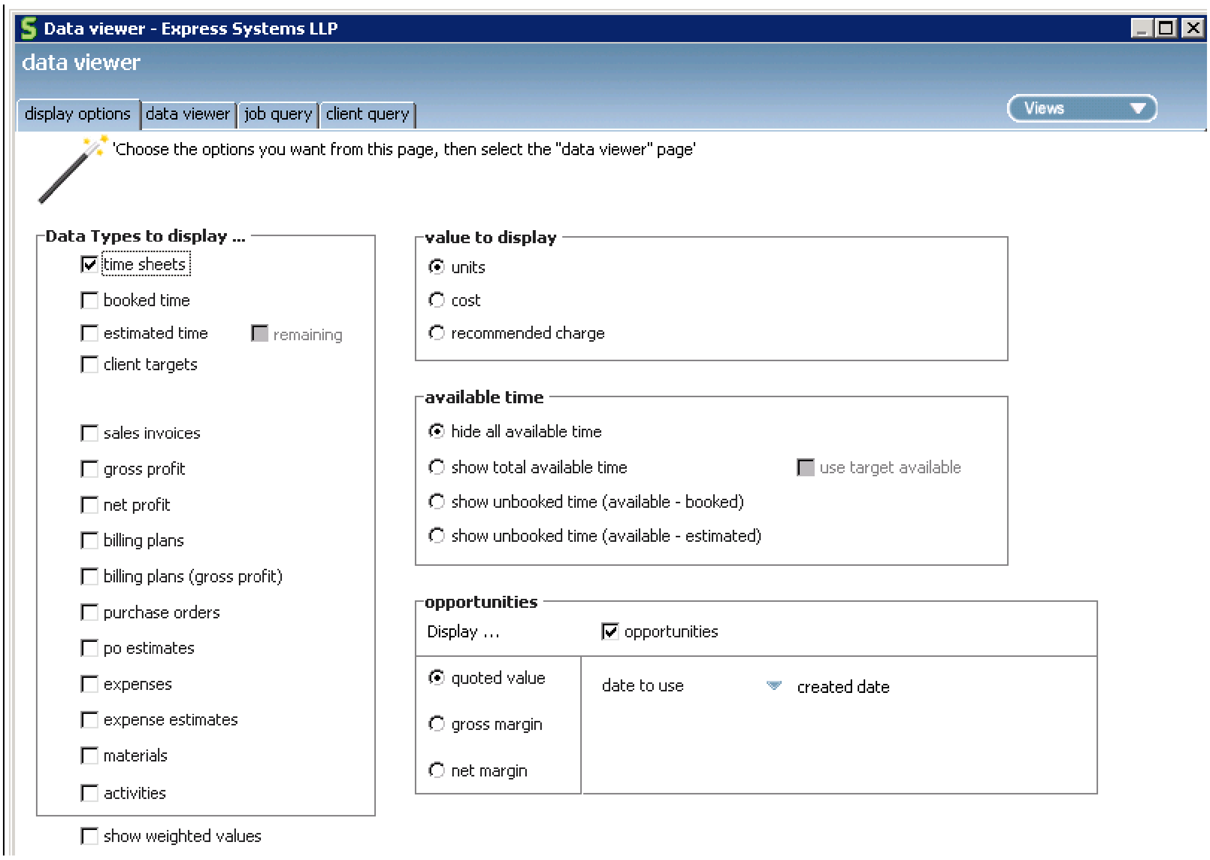
The first tab is the **'Display Options tab'**; this tab lists the different areas of information (the data tables) that can be used to compile data for reports using Data viewer.

Select one of these items by clicking on the box next to the item. You can then select how you would like the data to be displayed. E.g. for time you can opt for either hours or cost/charge.



For opportunities choose to use created date or expected close date. You have the option to select dates from a list by clicking on the blue triangle next to created date.





- Timesheets (Use this to report on "actual posted time")
- Estimated time (Use this for Capacity planning reports)
- Booked time (Use this for reporting on time allocated using the diary bookings)
- Sales invoices (Used to report on actual sales invoice - does not include drafts)
- Gross Profit/net profit
- Billing plans/Billing plans Gross Profit (Can be use only Billing plans have been activated in the Company settings)
- Purchase Orders/PO Estimates

- Expenses/Expense estimates
- Materials
- Activities
- Opportunities (Using the “Quoted values” options and the “Sales expected Close date” would produce a new Business forecast)

2. The Data Viewer tab

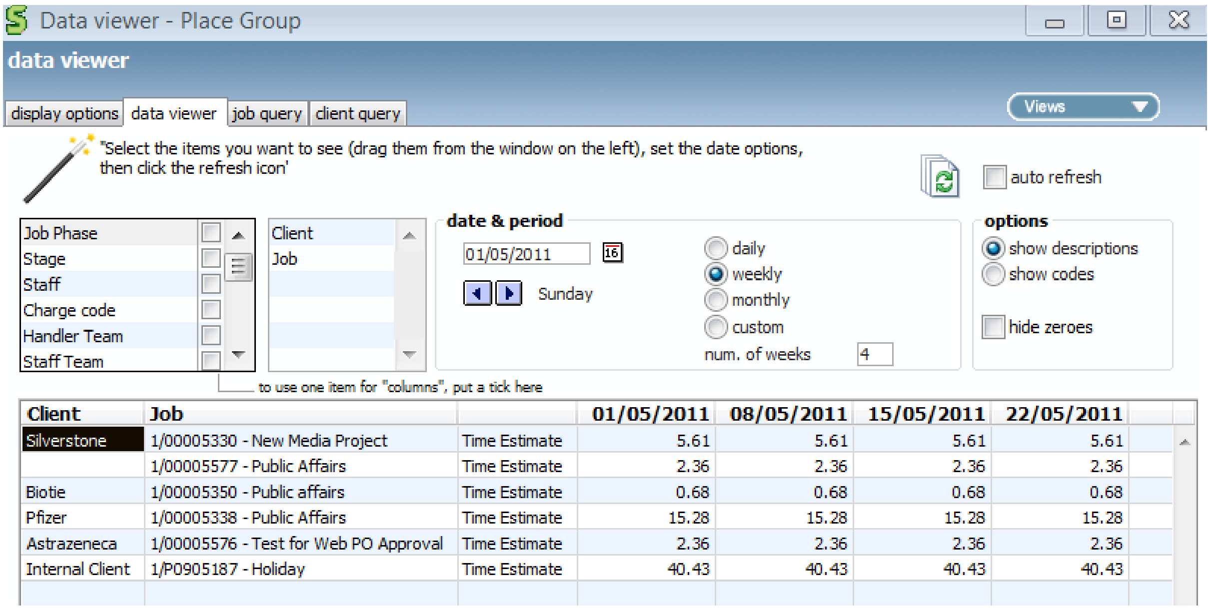
The second tab is the “Data Viewer Tab”; this tab allows you to select how you want to "cut" or "format" the data. Drag the required items from the left hand list of tables into the list box next to it.

a) Drag “Client” or “Job” from the left hand list of tables & fields into the selection box. The order that these criteria are listed in will affect how the data is summarized. The primary order for this selection would be by Client then by job.

   Add additional items e.g. drag “Account handler” above Client & Job to have data ordered primarily by Account Handler.

b) Select a date range by selecting a start date and whether you want to view the resulting data by day, week or month.

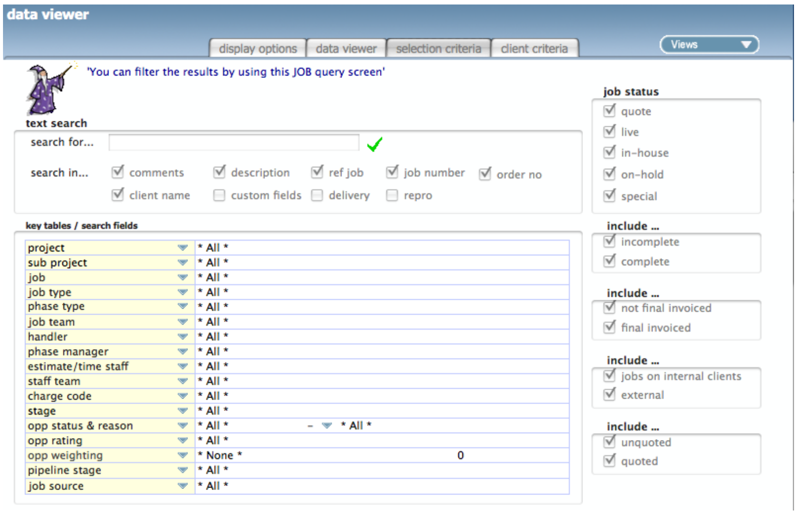
c) The number of days/weeks/months can be entered here. E.g. start date 1/5/2011 with 4 weekly columns.



3. The Selection Criteria tab

The third tab is the "Selection Criteria Tab"; this is used to filter which data is displayed in the view. Multiple criteria can be applied. All records are displayed unless filtered.

a) Include quote/live/in-house Jobs
b) Include/exclude completed/final invoiced Jobs
c) Filter by Job type, account handler
d) Filter by internal or external Client



4. Client criteria tab

This last tab is the "Client Criteria" tab; this is used to further filter the resulting records, based on Client fields. This is particularly useful if you are creating a view of data related sales and marketing forecasts, etc… Or, if you are only interested in data for a single, or set of specific Clients.

5. Views

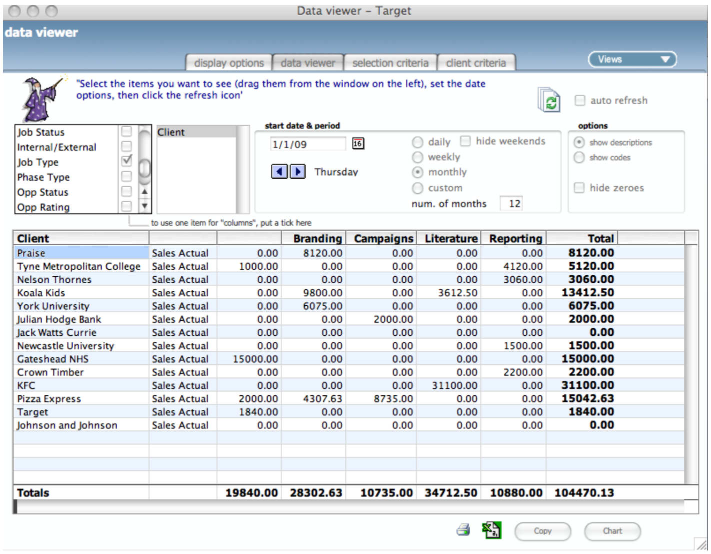
Once you have selected the rows and columns, filters, date ranges, etc… you can save your selected settings to a view.

This will then appear as an item list on the "Views" button under "My Views". The report can then be run with the pre-set criteria selections to produce consistent reporting. You also have the option to save the view for Groups or Company Views.

6. Cross Tab View

A Cross Tab report is one where the column headings are not pre-set. For instance you might want a column for every account handler. If a new account handler joined your team he/she would need to be automatically added as an additional column to the report. Cross tab reports are notoriously difficult to generate with standard reporting tools. However, with the data viewer it is easy. You simply put a tick in one of the check boxes

The example below displays Sales invoices by Client in the previous 12 months. The tick next to Job Type changes the column headings to a Job Type.



Client			Branding	Campaigns	Literature	Reporting	Total
Praise	Sales Actual	0.00	8120.00	0.00	0.00	0.00	**8120.00**
Tyne Metropolitan College	Sales Actual	1000.00	0.00	0.00	0.00	4120.00	**5120.00**
Nelson Thornes	Sales Actual	0.00	0.00	0.00	0.00	3060.00	**3060.00**
Koala Kids	Sales Actual	0.00	9800.00	0.00	3612.50	0.00	**13412.50**
York University	Sales Actual	0.00	6075.00	0.00	0.00	0.00	**6075.00**
Julian Hodge Bank	Sales Actual	0.00	0.00	2000.00	0.00	0.00	**2000.00**
Jack Watts Currie	Sales Actual	0.00	0.00	0.00	0.00	0.00	**0.00**
Newcastle University	Sales Actual	0.00	0.00	0.00	0.00	1500.00	**1500.00**
Gateshead NHS	Sales Actual	15000.00	0.00	0.00	0.00	0.00	**15000.00**
Crown Timber	Sales Actual	0.00	0.00	0.00	0.00	2200.00	**2200.00**
KFC	Sales Actual	0.00	0.00	0.00	31100.00	0.00	**31100.00**
Pizza Express	Sales Actual	2000.00	4307.63	8735.00	0.00	0.00	**15042.63**
Target	Sales Actual	1840.00	0.00	0.00	0.00	0.00	**1840.00**
Johnson and Johnson	Sales Actual	0.00	0.00	0.00	0.00	0.00	**0.00**
Totals		**19840.00**	**28302.63**	**10735.00**	**34712.50**	**10880.00**	**104470.13**