



## Synergist Spotlight on...

### Scheduling reports

Synergist has many reports that can be run from the standard Reports menu or the Data viewer.

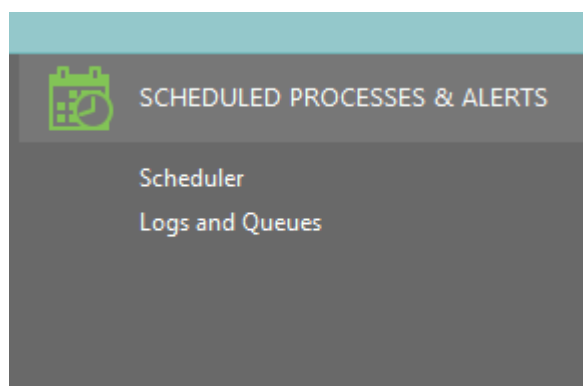
Why not automate reporting as much as possible by letting Synergist do the work and deliver the report to your inbox?

Having a report delivered straight to your email inbox saves time and ensures that your regularly used reports are created consistently. Reports are available regularly without even the touch of a button.

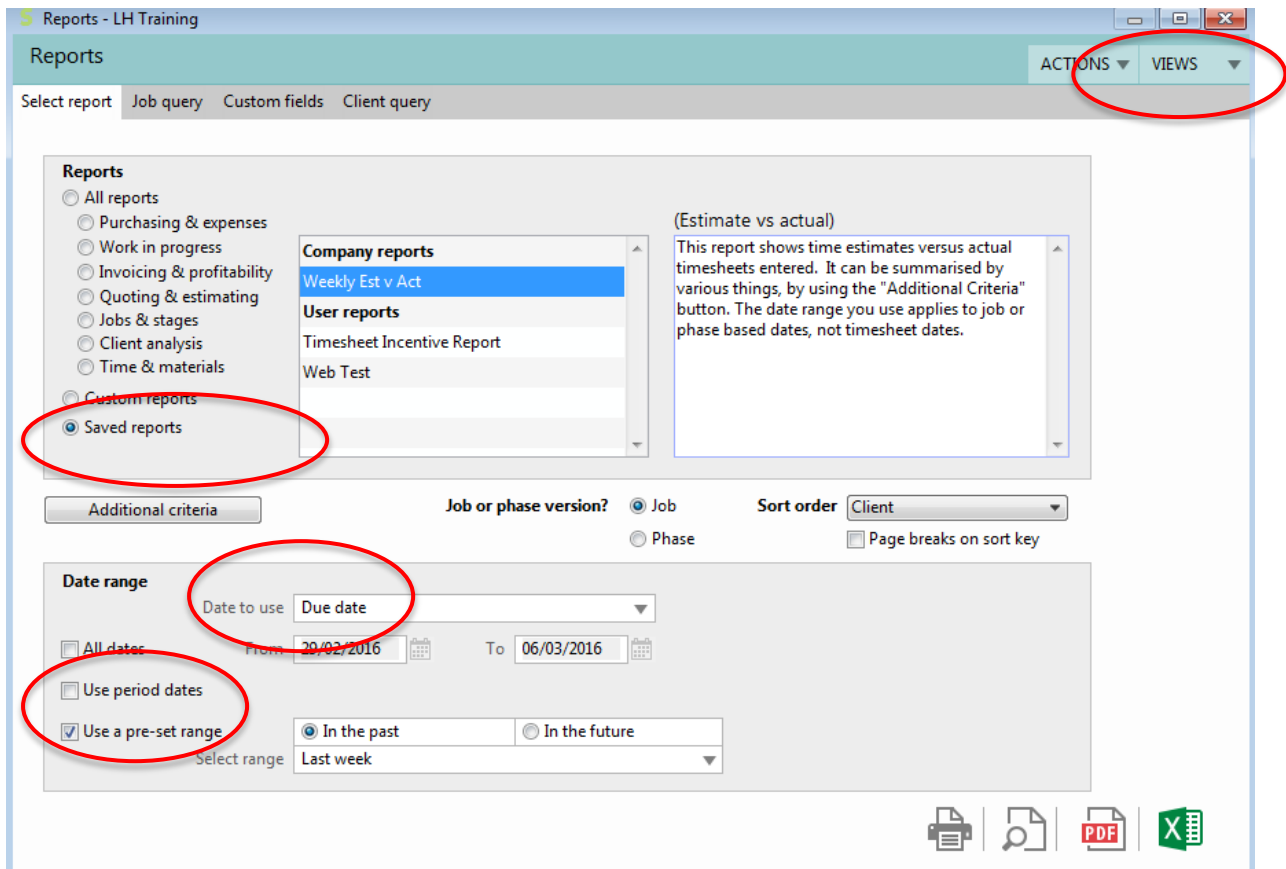
- Auto generate a PDF or an export of a report
- Selected ordering or filtering can be applied and is key to running the report consistently
- Choose regular intervals for the report to be generated – daily, weekly or monthly
- Define who should receive the report

#### 1. How to schedule a report

1. Create your report and save as a user view (see section below - Saving a Report)
2. From within Tools & Settings Menu, select the Utilities sub menu. From this screen under the menu block, Scheduled Processes & Alerts, select **Scheduler**. (This may be restricted access for certain users so please check with your Super User).



## 2. Saving a Report



### Key points for scheduling reports

1. Set the order & filtering required for the report

- Use the 'sort order' as well as the job query or client query tabs to filter the report.

2. Within the Date Range section you will need to select the "date to use".

The selected report will define what type of date that it will use. E.g. a timesheet report will default to using the type of date as **'timesheet date'**.

3. Apply a pre-set date range

- As the report is to be scheduled, the period that the report needs to include has to be defined.
- Date periods for the past or the future can be selected. E.g. last week, last month or next week.

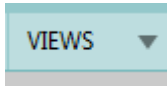
Use a pre-set range

Select range

In the past       In the future

Last week

### Save the report as user view



- Once you are happy with your selection of the above, click on the Views button at the top right of the screen; then click on “Save this report as a new view”.
- Give the view a name.

Name	Default
Weekly Est v Act	<input type="checkbox"/>

Enter a name for the view...

For report: Estimate vs actual

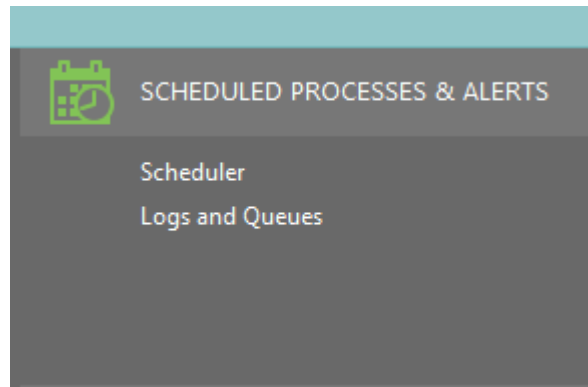
OK Cancel

- The report is saved and is now visible within the ‘saved reports’ in the reports menu and also from the views button.
- To change the saved reports, amend the selection criteria and re-save the view. You will be prompted to ‘Overwrite selected report? Click “YES” to save the new version.



### 3. Scheduler

In order to schedule a saved report access to the **Utilities** menu is required. Super Users may have access to this area. Select 'Scheduler'. Click 'New' to create a new report schedule.



You will be presented with a list of scheduled events, to create a new event for your report, click on "New" at the bottom left of the screen.

Description	Active	User	Last date/time	Next date/time
Auto-Created Alert Before Activity Due	<input checked="" type="checkbox"/>	4D Server	08/03/16 3:50pm	08/03/16 3:55pm
Auto-Created PDF Server Process	<input checked="" type="checkbox"/>	4D Server		
Auto-Created Scheduled User logout	<input checked="" type="checkbox"/>	4D Server	24/01/15 10:13pm	08/03/16 11:59pm
Auto-Created Upgrade Version Check	<input checked="" type="checkbox"/>	4D Server	24/01/15 10:13pm	09/03/16 2:24am
Overdue Time sheets	<input checked="" type="checkbox"/>	4D Server	08/03/16 2:30pm	14/03/16
Report Generation	<input checked="" type="checkbox"/>	4D Server	04/03/16 11:13am	03/04/16 10:00am
Report Generation	<input checked="" type="checkbox"/>	4D Server	04/03/16 11:13am	03/04/16 8:30am
Test Saved Reports	<input checked="" type="checkbox"/>	4D Server	08/03/16 2:30pm	14/03/16 10:00am
Timesheet Competition	<input checked="" type="checkbox"/>	4D Server	04/03/16 11:13am	03/04/16 10:00am
Yesterdays Time Entries	<input checked="" type="checkbox"/>	4D Server	08/03/16 2:30pm	09/03/16 8:00am

Buttons: New, Delete, Run Now, Check Now, Done

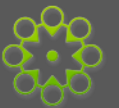


1. Select 'Report Generation' from the list of available scheduler types.
2. Use the drop down list next to description to select your previously saved report.
3. Select the frequency you would like the report to be delivered e.g. weekly, monthly.
4. Add the email addresses you would like the report to be sent to. Creating a group distribution address in outlook could be useful here e.g. account handlers@
5. Enter the name of the report (this will be displayed in the scheduler list and prevents multiple items being displayed as 'report generation'.
6. Tick 'active' to switch on this alert.

#### 4. Try scheduling the following reports:

- **Last Month's Invoicing**

Select the standard report 'Period Invoice Date Profitability' and save with a pre-set date range of 'last month'. Schedule this report to be delivered monthly on the 3rd of the month.



- **Last week's timesheets**

Select the standard report 'Timesheets by day' and save with a pre-set date range of 'last week'.

Schedule this report to be delivered on Monday each week.

- **Billing Forecast**

Go to the Data viewer, select Billing Plans from the Display Options Tab, then from the Data Viewer Tab select client, choose a pre-set date range of "This Month" set the frequency to Monthly for 3 months

Client		Mar 16	Apr 16	May 16	Total
LH Training	Sales Plan	0.00	500.00	500.00	1000.00

- **Opportunity Forecast**

Go to the data viewer, from the Display Options Tab select Opportunities based on expected close date. On the Data Viewer tab Select client and/or handler as required, with the date range as monthly for 3 months.

**Opportunities**

Display ...  Opportunities

Quoted value      Date to use ▼ Expected close date

Gross margin

Net margin



Display options | Data viewer | Job query | Custom fields | Client query

'Select the items you want to see (drag them from the window on the left), set the date options, then click the GO button'  
'Data Type' will be automatically included if you don't select it yourself

**GO**

**Company**  
 Company  
 Current Stage  
 Handler (Client)  
 Handler (Phase)  
 Handler Team

**Client**  
 Client  
 Handler (Job)

**Date & period**  
01/03/2016  
Tuesday  
 Use a pre-set range  
This month

Daily  
 Weekly  
 Monthly  
 Custom

No. of months: 3

to use one item for "columns", put a tick here

Client	Handler (Job)		Mar 16	Apr 16	May 16	Total
All England Netball Association	Lesley Hill	Opportunities	0.00	0.00	0.00	0.00
Express Systems	Lesley Hill	Opportunities	0.00	0.00	250.00	250.00

Please contact The Agency Works at [clientservices@taw.co.uk](mailto:clientservices@taw.co.uk) or

01455 553246 if you wish to discuss further

Scheduling reports within Synergist