




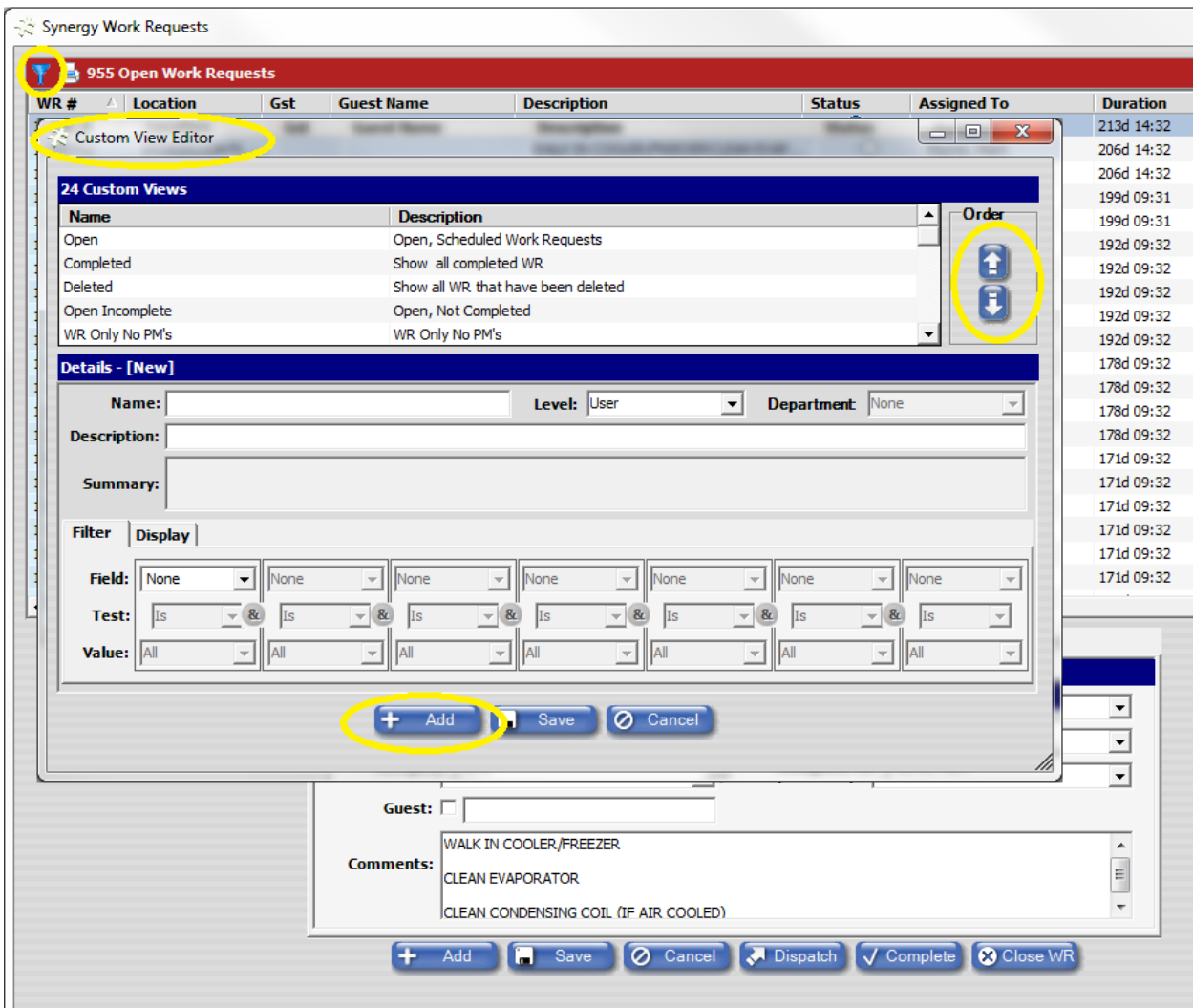
Creating Work Request Custom Views in SynergyMMS

How do I create a custom view in SynergyMMS?

Once in the Work Request (WR) Full View click the blue funnel  in the upper left corner. When the menu drops choose the very last one that says Customize query.

Next you will be prompted with the Custom View Editor window (see below).

Click Add to add a new View.



The screenshot shows the "Synergy Work Requests" application window. At the top, a red header bar displays "955 Open Work Requests" next to a blue funnel icon. Below the header is a table with columns: WR #, Location, Gst, Guest Name, Description, Status, Assigned To, and Duration. A "Custom View Editor" window is overlaid on the table. This window has a title bar "24 Custom Views" and a table with columns "Name", "Description", and "Order". The "Name" column lists: Open, Completed, Deleted, Open Incomplete, and WR Only No PM's. The "Description" column lists: Open, Scheduled Work Requests; Show all completed WR; Show all WR that have been deleted; Open, Not Completed; and WR Only No PM's. The "Order" column has up and down arrow icons. Below the table is a "Details - [New]" section with fields for Name, Level (User), and Department (None). There is also a Description and Summary field. A "Filter" section contains a grid of dropdown menus for Field, Test, and Value. At the bottom of the Custom View Editor are buttons for "+ Add", "Save", and "Cancel". The main application window also has a "Comments" field with the text: "WALK IN COOLER/FREEZER", "CLEAN EVAPORATOR", and "CLEAN CONDENSING COIL (IF AIR COOLED)". At the bottom of the main window are buttons for "+ Add", "Save", "Cancel", "Dispatch", "Complete", and "Close WR".

Fill in a new **Custom view name**: This is any name you would like. It is limited to 20 Characters and will be the selectable name to use this view. Try to make this name descriptive for future reference.

Select the **Level** that will be able to access this view:

User – This makes the view only available to you, the person that created it.

Dept – This makes the view available to all users in the department that is set in the Department drop down **Department**.

Admin – This makes the view available to all users at the property.

Fill in the **Description**; this can be the same as the name, however it allows for 50 characters so it is a bit more descriptive.

Now using the **Filters** drop down in combination with the Test and the Value create the data set you are looking for. See more on this with some examples further down in the document.

Order: This allows each user regardless of if they have rights to create custom views to order their views. This allows a user to reset the primary view for when the Full view is loaded.

The screenshot shows the 'Custom View Editor' window. At the top, there is a list of 16 Custom Views with columns for Name, Description, and Order. Below this is the 'Details - Ericas's WR' section. It includes fields for Name (Ericas's WR), Level (Department), and Department (ENG). The Description is 'Ericas's WR'. The Summary is 'Status Is Not Closed AND Status Is Not Deleted AND Reported By Is Sanfilippo, Erica'. The Filter section is active, showing a grid of fields, tests, and values. The fields are Status, Status, Reported By, and four 'None' fields. The tests are 'Is Not', 'Is Not', 'Is', and four '&' symbols. The values are 'Closed', 'Deleted', 'Sanfilippo, Erik', and four 'All' values. At the bottom are 'Add', 'Save', and 'Cancel' buttons.

Example: Let's say your job consist of looking at the WR created and not completed that are back of the house for the trade of plumbing. We can create a custom view showing this data and then you can set this as your first or default View. Each time you now load the WR Full view this would be the data you would see by default, no filtering or anything else.

Note: Your default view is the main one that displays when you load the WR Full View.

Filters: More on filters, Filters consist of the fields available on the work request form, they allow you to set a test of equal, not equal, greater than or less than, and finally set a value you are looking to evaluate.

The screenshot shows the 'Filter' section of the Custom View Editor. It displays a grid of 12 columns, each with a dropdown menu. The columns are labeled Col 1 through Col 12. The values are: Col 1: Location, Col 2: Guest, Col 3: Guest Name, Col 4: Description, Col 5: Status, Col 6: Assigned To, Col 7: Duration, Col 8: Date Opened, Col 9: None, Col 10: None, Col 11: None, Col 12: None. At the bottom are 'Add', 'Save', and 'Cancel' buttons.

Display: The Display tab allows you to show whatever data you want in the column headers on the WR Full View. The options are values already used in work request, and a few special ones setup in SynergyMMS.

Examples for creating Custom Views:

1. If you are looking for all WR that are open set the following:
Filter = Status, Test = not equal, Value = Closed
Filter = Status, Test = not equal, Value = Deleted

2. If you are looking for WR that are opened today set the following:
Filter = Date Opened, Test = equal, Value = {Today}
 - Today and Now, are special values for SynergyMMS
 - You can also do {Today-5} for things in the past 5 days.

3. If you are looking for WR created by the logged in user set the following:
Filter = Reported by, Test = equals, Value {User}
 - {user} is another special value in SynergyMMS



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