

Technical Release Notes 2023

This document details the changes implemented into Synergy, including new features, improvements, and bug fixes.

November 2023

Release Date: 12 November 2023

New Capabilities

Planning Boards - New look and feel

Planning Boards have been redesigned with a beautiful new look and feel to enhance the visual clarity of data and provide consistency.

Functionality in the Planning Boards remains the same, so the Synergy you know and love is still there just with a fresh new look. A “Legend” has been added to the on-page controls to help you navigate your way around the changes.

Colours

Colours have been unified across Project Planning, Resource Planning, Project Schedule and Revenue Forecast so there is now similar themes related to the pills and their colours being shown. Additionally, we have chosen a lighter background to harmonize the Planning Boards with the rest of Synergy.

Key colour changes include:

- Teal represents a Project
- Dark Blue represents a Phase
- Light Blue represents a Task

Project Statuses

The **Statuses** is indicated by the colour of the Project, Phase, or Stage, with Proposal Status for Projects and Stages using a lighter teal and blue respectively.

Project	STATUS: Active + other statuses
Project	STATUS: Proposal
Phase	ANY STATUS
Stage	STATUS: Active + other statuses
Stage	STATUS: Proposal

These colours are applicable across all Planning Pages, except for Resource Planning, which has a simplified palate using just the Phase colour and the Active Project colour for all Projects. When looking at a Project Status on Revenue Forecast and Resource Planning you will see them as a Cell rather than Pill visible in the below image.

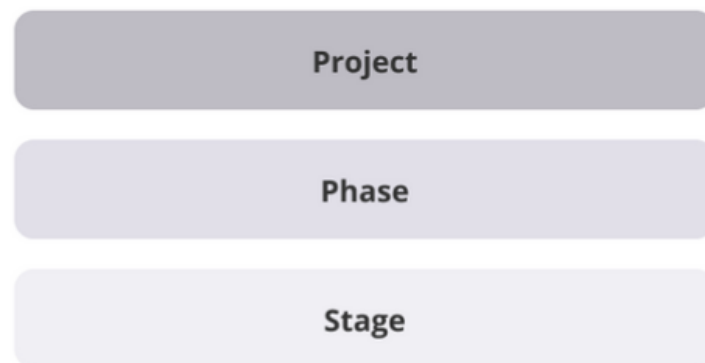
Project - Active Status



Project - Proposal Status



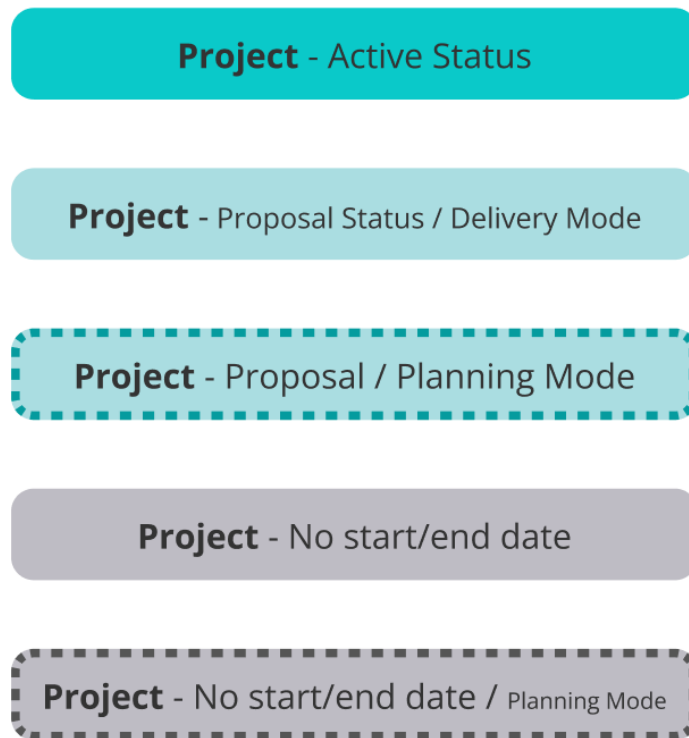
If a Project does not have a status (when no start or end date has been applied), the a greyscale colour will apply to Phases, Stages, Tasks and Milestones. The Grey colour is also applied when a resource is unassigned.



Project Modes are visible and determined by the dashed border. These modes are applicable only to Projects. Previously, Modes were represented by hatched lines.



The examples below show how the dashed border may appear depending on other project statuses that are applied on the planning boards.



Resources

Colours of a resource have been updated. On Project Planning and Project Schedule these have the same changes and are identical in function whereby you can see an individual resource under a stage. Like the below image.

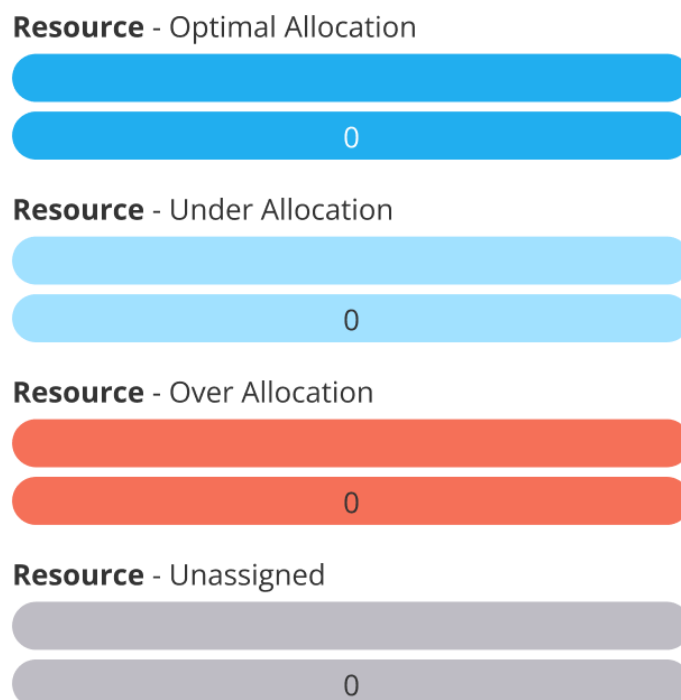


When editing a resource and expanding the cell editing mode you can now see a dashed border representing active edit, while solid border around a cell is not actively being edited. The colour of these borders will help identify a resources status as Over Allocated, Optimal & Under Allocated.

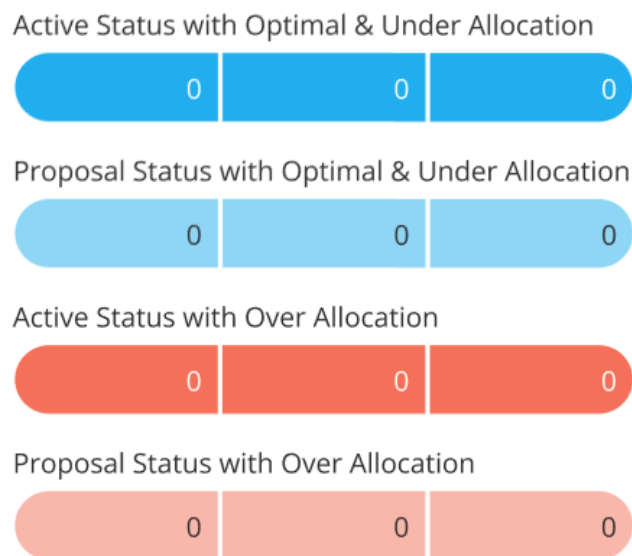


In Resource Planning and Revenue Forecast, this functionality is a little different due to stages and resources being combined into the same pill.

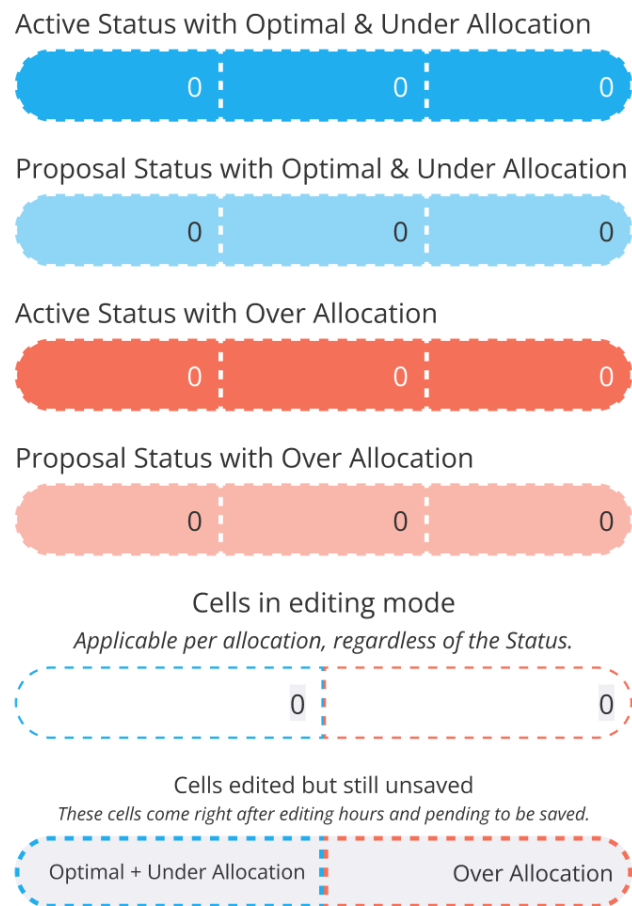
On Resource Planning, resources are initially displayed as a summary via solid pills like the below image.



When a resource has been expanded resourced hours and stage statuses are conveyed together.



When in editing mode these same cells will have a dashed border displaying that they are editable. When a cell is being actively edited the cell background will turn white with a coloured dashed border.



In the Revenue Forecast the nature of cells is similar to Resource Planning, where Stage Status and Resource Allocation are combined.

Active Status with Optimal & Under Allocation



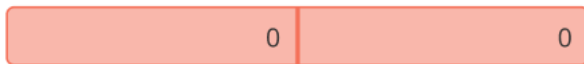
Proposal Status with Optimal & Under Allocation



Active Status with Over Allocation



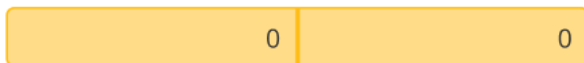
Proposal Status / Over Allocation



Active Status / Warning



Proposal Status / Warning



Active Status with Optimal & Under Allocation



Proposal Status with Optimal & Under Allocation



Active Status / Over Allocated



Proposal Status / Over Allocated



Active Status / Warning



Proposal Status / Warning



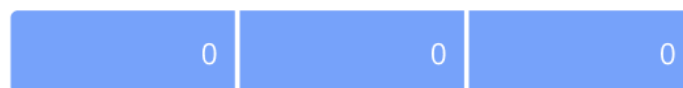
Cells in editing mode (applicable to all statuses)



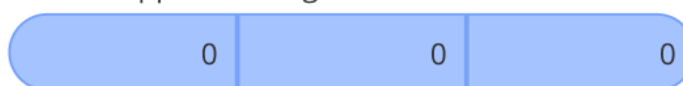
The key difference between the Revenue Forecast colours and the Resource Planning colours is the addition of a Yellow Warning when a revenue stream has inconsistencies.

Leave has also been updated for the resource page - example below.

Leave - Approved Project cell

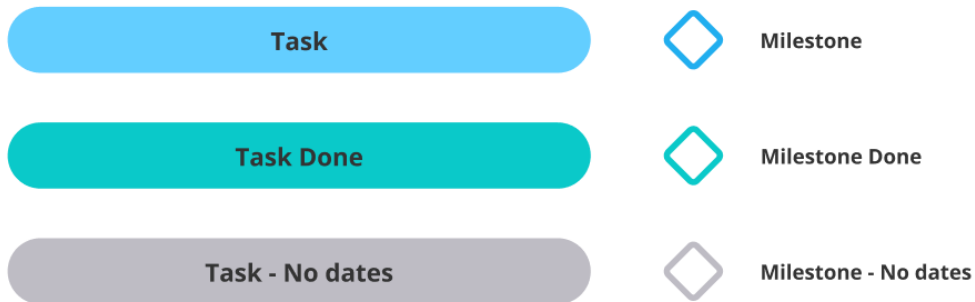


Leave - Approved Stage cell



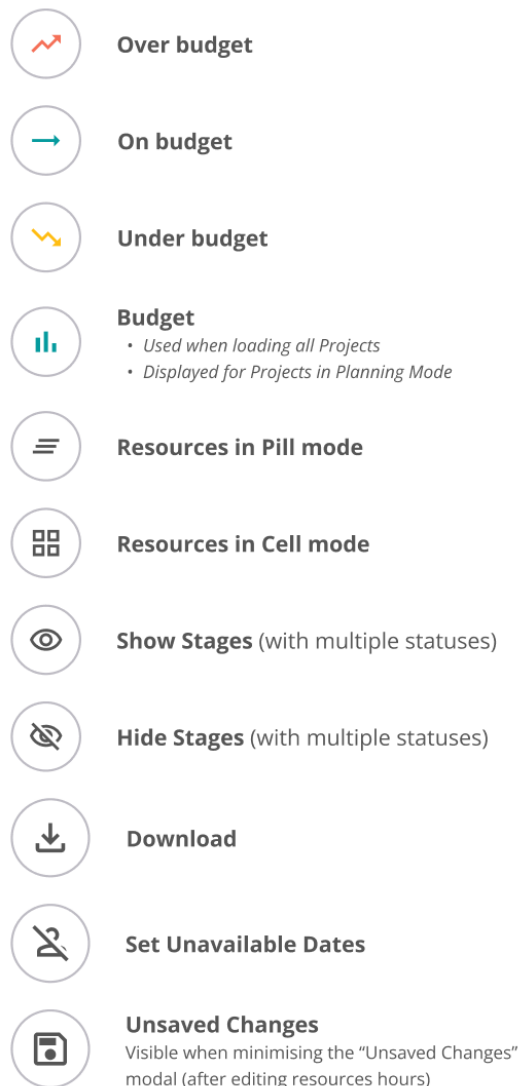
Tasks & Milestones

Tasks and milestones have been refreshed with updated colours.



Buttons

The following buttons have been updated and preserved with functionality and placement.



Colours have been purposefully selected to ensure lower levels of confusion and improve colour contrasting with the visually impaired in mind, the planning boards are now AA rated for Web Content Accessibility Guidelines (WCAG) and standards.

Edition Availability

Function	Professional	Business	Enterprise
New Look Planning Boards		✓	✓

Invoices - Automated Sending

You can now select multiple projects and create draft Invoice for those projects in bulk.

Using the new filters from the Project list and sorting them by the different columns, you can specify and select the projects you want to create a draft invoice for.

Once you have confirmed you want to bulk create Invoices, they will begin processing immediately in the backend.

You will get a notification when this process has finished and you will be able to access a report that shows the success of each project.

There are a number of fields you can configure for your Invoices, when bulk creating them:

Invoice Date

Select the date you want for the Invoice - by default this will be set to today's date but it can be customised.

Invoice Status

Customise the status for the Invoice - by default this will be set to created.

Approvals

Specify if any Approvals will be assigned to the Invoice. Once the draft Invoice is created, the staff members will get an in-app notification. You can choose to not include Approvals, or you can reuse the approvals on that projects previous invoice or select to use the Project Managers as the approvers.

Edition Availability

Function	Professional	Business	Enterprise
Bulk Create Invoices			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Bulk Create		✓	✓	✓	✓	✓

New Project List

The technology used for the Invoices list page has been updated to include some new features and UI changes. These changes are only accessible from the organisation-wide project list.

Projects Table

The Projects lists table has been updated, so you can sort by the different columns of data and sort by highest/lowest for columns displaying values or alphabetical for all others.

Filters

Filter your Invoices by the more robust Filter that is used on Planning Boards, Invoices, and Purchase Orders lists - this option is accessible from the left of the Project page. Unlike the previous filters, you can select multiple criteria under each filter type to get more specific results.

The same filters are available from this page and these are:

- Active Status
- Billable
- Project Custom Fields
- Office
- Prefix
- Project Manager
- Project Status
- Project Tags
- Project Type
- You can also save different filters, and create a default filter to load when opening Projects list.

Invoices Views

The View option is now on the right of the page. You have access to the same four Views:

- Default
- Site address
- Tags
- Fees

Pagination

You have access to the same pagination options:

- 1
- 5
- 10
- 20
- 50
- 100

Timesheet Improvements

New functionality has been added so you can copy your last timesheet to the current week. You will be able to copy the Project, Stage, Task and hours from the previous weeks timesheet.

This setting can be found and adjusted to suit your business via the configurations page.

Edition Availability

Function	Professional	Business	Enterprise
Copy Timesheets	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Copy Timesheets	✓	✓	✓	✓	✓	✓

Financial Importer Improvements

How customers are onboarded has been improved so migrating financial data into Synergy is more flexible and customisable.

Invoices without Transactions

We started by improving what happens when you use the Advanced Financial Importer to load in Invoices without transactions.

Now, when no Transactions are provided in the Financial Import Excel file, Synergy will treat these as a Prebill Invoice which will create Prebill Transactions. This is designed for Fixed Fee/Percent of Contract Stages only. For Hourly/Capped Stages, transactions are still required to be present in the Excel file.

Cancelling Imported Invoices

You can now cancel an Invoice that was created through the Advanced Financial Data Importer. If the Invoice Stage is unsuccessful or complete, the transactions will be written off, otherwise the transaction goes back to WIP and all invoiced values on the transaction revert to 0.

Import Balance Forward Invoices

A new checkbox, "Import Balance Forward Invoices only" has been added to the Import Financials page.

If you leave this unchecked, the standard import process will proceed, and you can import Stages if there aren't any Stages of the same name in the same Phase already.

When checking the new checkbox, new Stages will not be created. The Importer will verify that the Phase and Stage names match, and that the Fee Type is the same and then create a unique Invoice represented as a single Office Expense transaction.

Additional Improvements

- **'Invoice Audit Sent Date' field** has been renamed to 'Invoice Audit Activity Date', so the intention of this reportable field is clearer.
- **How Offices are assigned** to imported invoices has been improved - if Office isn't specified when importing the Invoice, the Project's Office will be used as default.

Fixes

- **Filed Emails** - Issue fixed where deleted filed emails from a project weren't removed from the file list and the storage usage wasn't reduced.
- **Work breakdown** - Issue fixed where Phases wouldn't load in the Work Breakdown page when viewing a Project in Edit mode.
- **Scheduled Report** - Issue fixed where the date set for a scheduled report wasn't showing as the Next Run Date after the schedule is created.
- **Resource Planning** - issue fixed which always showed Unavailability on Resource Planning as a full day, even if only a few hours of unavailability were entered for a staff member.
- **Purchase Orders** - Issue fixed where the address on a Purchase Order wasn't populating when generating the Purchase Order document.
- **Credit Note document** - Issue fixed where updating a Credit Note document would inaccurately show a warning message, suggesting fields were missing.
- **Credit Note** - Issue fixed when using "Credit Adjusted Invoice Tax Total" bookmark in a Credit Note document it was showing the value for "Credit Adjusted Total Including Tax" instead.

October 2023

Release Date: 15 October 2023

New Capabilities

Team Improvements and Bulk Assign

We have added new functionality to Synergy so that you may now set up teams and resource them to a project. You will be able to create and save a team from the teams page, assign a team to a project from Project Planning and the Schedule. Additionally you will still be able to utilise the Customise Resource feature enabling greater control over a teams assignment to a project.

Manage Teams

We've updated the Teams page, to include the ability to see and edit members of that team.

You'll still be able to do the following:

- Create a Team
- Edit a Team name and if it is the organisational default Team
- Delete a Team

Additional out-of-the box features will now be available from Teams page:

- Search function
- Filtering (including saving filters and customising the default)
- Sorting by column
- Pagination (5, 10, 20, 50, 100)

Resource a Team

We have updated the Stage Resourcing Panels in the planning boards to enable you to bulk assign an entire team to a project.

- You can bulk assign an entire team of staff to a project from Project Planning and Project Schedule
- You can filter an entire team on Resource Planning.

Edition Availability

Function	Professional	Business	Enterprise
Manage Teams Page			✓
Bulk Assign			✓
Customise Resources			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Read Teams	✓	✓	✓	✓	✓	✓
Create Teams					✓	✓
Edit Teams					✓	✓
Delete Teams					✓	✓
Resourcing Teams			✓	✓	✓	✓

Reports Improvements

Scheduled Reports

We've added a new feature so you schedule a report to be run and emailed automatically.

You will be able to customise the frequency that this report is run and sent, with the following options:

- Daily
- Weekly
- Fortnightly
- Monthly
- Quarterly
- Yearly

As part of this feature, you will also be able to customise the following parameters:

- Report Name
- Start and End Date (or No End Date)
- File Type (PDF or EXCEL)
- Email Recipients (including CC and BCC)
- An included message

Reports List

We've updated the Reports page, to match the updates already available from Invoicing and Purchase Orders. Now, Reports will leverage the following out-of-the-box features:

- Improved search
- Improved filtering (including saving filters and customising the default)
- Sorting by column
- Pagination (5, 10, 20, 50, 100)

We've also added new data as columns for the Reports page, which can also be filtered on:

- The date you last ran a given report
- The date a given report was last updated
- The user who created a given report
- A new curated list of the top 20 most popular reports across all organisations

Edition Availability

Function	Professional	Business	Enterprise
Scheduled Reports			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Read	✓	✓	✓	✓	✓	✓
Create			✓	✓	✓	✓
Edit			✓	✓	✓	✓
Delete			✓	✓	✓	✓

Additional Improvements

- We have improved how quickly Synergy generates a new Invoice Document. This used to take 15 seconds, but now Synergy will check if a new document needs to be generated every 5 seconds.
- We made some significant improvements to how we syntonise with SharePoint.
 - We made some significant technical improvements, which means that synchronising is now up to 9 times faster.
 - You can now check "Active projects only", when setting up your synchronisation.

Fixes

- Document Templates - Fixed an issue where the bookmark "Contract Percent" in the Fee Table was not populating any information.
- Document Templates - Fixed an issue where adding a cell border was not saving when editing a table.
- Revenue Forecast - Fixed an issue where some imported projects were not accurately reflected when filtered by Internal, External, or Expenses.
- Revenue Forecast - Fixed an issue where some values were showing incorrectly when filtering to "Internal" forecasting, because they weren't subtracting the invoiced amounts.
- SynergyFieldBook - Fixed an issue where sometimes a message was incorrectly being displayed, saying that the user didn't have a licence.
- Data Uploads - Fixed an issue where uploading data into Synergy was filing if the numbers had more than 2 decimal places. Now if more than 2 decimal places are present the value is rounded up.
- Projects - Fixed an issue where you couldn't delete a project if you created a cash expense with an uploaded attachment, even if the transaction was removed.
- Project Tags - Fixed an intermittent issue where Tags could disappear from the Project Summary screen on projects. Further testing has shown that this is happening only when the project status is changed.

September 2023

Release Date: 17 September 2023

New Capabilities

Utilisation Threshold Editing.

From the Configuration page you can adjust and customise the underutilisation and overutilisation percentages seen on staff avatars on the Planning Boards.

Changing these percentages will change the utilisation colour indicators on the Planning Boards, and affect the whole organisation.

Edition Availability

Function	Professional	Business	Enterprise
Utilisation Threshold Editing			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Utilisation Threshold Editing					✓	✓

Staff Unavailability

You now have better insight if a staff member is unavailable based on their scheduled leave when you are resourcing staff to a project. From the new tooltip, you will see staff unavailability scheduled within the next 90 days.

The information will show on tooltips on the Staff action panes from Resource Planning, Project Schedule, and from Stage Resourcing and Customise Resource on all other Planning Boards.

Edition Availability

Function	Professional	Business	Enterprise
Staff Unavailability			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Staff Unavailability			✓	✓	✓	✓

New Add-On

SynergyPIM – Email Management

- It is now possible, once subscribed, to enable/disable the Email Management add-on via the Document Control tab in the Connect to PIM area.
- It is now possible to subscribe to the new Email Management add-on via the Subscription page.

Edition Availability

Function	Professional	Business	Enterprise
Email Management add-on	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Subscribe to Email Management						✓
Configure Email Management						✓
Use Email Management	✓	✓	✓	✓	✓	✓

The Inbox Assistant

- A new page called the Inbox Assistant (referred to as the IA) is accessed from the Organisation Menu.
- When the IA is enabled, an overnight process will read the staff's Outlook Inbox and cache 300 emails (of which 100 are displayed in the IA at a time for Registration). This means that the following day, when staff open the IA page, they will have email ready to be filed - however it will not include emails received after midnight today.

- Only emails that have been read, or not 'flagged for follow-up' are pulled into the IA.
- Emails are categorised into "Needs your input", "Needs confirmation" and "ready to register". You can register each section separately, or all as a whole.
- When registering emails, in the background the IA will also inspect your Outlook inbox for more emails. When the most current emails have been registered, the IA will progressively read older email.
- It may be beneficial to move old emails to a subfolder, such that IA does not process old emails that you do not wish to register.
- Emails can be flagged for follow-up, or deleted from inside the IA
- Upon registration, emails are moved to a subfolder. Emails that are not related to a project can be moved to a 'personal', or 'company' sub-folder.
- Project emails are copied to the project's document register folder in Synergy, and if UW is enabled, the email is copied to the project location in SharePoint.
- Categorisation is done based on a confidence score. The Subject and Body of the email is read, looking for the project number, and project name. The better the match, the higher the confidence score.
- Emails that are part of a thread that has already been registered, will be in the "ready to register" category and can be filed with 100% confidence.
- Emails from any category that have been filed by a colleague, will be in your "ready to register" category.

Improvements and Fixes

- Project Stages – Fixed an issue where unnecessary errors would occur when editing dates on a Stage.
- Planning Boards – Fixed an issue where the Gross Revenue Report was incorrectly appearing as a view option in Planning Boards.
- Revenue Forecast – Fixed an issue where column names would not appear correctly, and refresh did not work when exporting a report from the Revenue Forecast.
- Revenue Forecast - We've improved the visualisation of the Revenue Forecasting Planning Board so that you can now see a full 12 months of data on screens with a 1080p resolution.

August 2023

Release Date: 13 August 2023

New Add-On

SynergyPIM – Document Control

- It is now possible to subscribe to the new Document Control add-on via the Subscription page.
- It is now possible, once subscribed, to enable/disable the Document Control add-on via the Document Control tab in the Connect to PIM area.

Edition Availability

Function	Professional	Business	Enterprise
Subscribe to Document Control	✓	✓	✓
Configure Document Control Integration	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Subscribe to Document Control						✓
Configure Document Control Integration						✓

Master Document Register

- The new Document Control add-on enables a new Document Register layout that separates the Document Number, Document Title, and the Filename into separate fields, to better understand and manage your Master Document Register.
- Preferred views can be saved with each folder. For example drawings might use the 'Document register' view, whereas your email folder would use the 'email details' view.
- The Document Details page includes new fields to specify the Document Number and the Document Title.

Bulk File Registration

- We have provided a new capability to bulk register new documents, and new revision of existing documents.
- Configure the 'filename patterns' in 'Organisation menu/Settings/Organisation/File name decoder' to recognise and decode various patterns to recognise the Document Number, Document Title, and Document Revision.
- Drag and Drop multiple files to automatically register new documents and new revisions of existing documents. The Bulk Registration tool will match new revisions, even when the filenames are unique because the filename includes the revision number.

Transmittal Summary

- There is a new tab on the Document Register page, for the Transmittal Summary.
- When sending a transmittal, the details are automatically recorded on the Transmittal Summary.
- The Transmittal Summary is the familiar layout of:
 - Documents listed as rows.
 - Transmittals listed as columns.

Document Template reference numbering

We added a feature when configuring a Document Template (for example, the Project Proposal) to specify both the unique document number to be shown on the document register, and configure a unique filename

Updates

SynergyPIM – Unified Workspace

- When UW is enabled, the Project Documents page gets a new tabbed layout. There is a tab for “Working Files” and a second tab for “Document Register”
 - The Working Files tab includes a SharePoint Browser that allows you to browse your SharePoint document storage, without needing to leave Synergy and open SP.
 - The Document Register tab displays the existing Document Register
- Working Files:
 - You can now browse your SharePoint storage for this project from inside Synergy. This is intended to be a convenient browser, and does not replicate all the features of SharePoint.
 - When you generate a Project Document, such as a Project Proposal, it will be available to view/edit in the Working Files tab.
 - We have provided a convenient “Open in SharePoint” button to open the current folder in the SharePoint storage, to help you access more advanced SharePoint features.
 - We have also enabled opening a document that is stored in SharePoint from the Synergy Working Files tab, with a single click on the document. The file will be opened in a new tab. Any changes will be automatically saved back to SharePoint.
 - We added a simple filter that searches in the file names of files in the current folder and all sub-folders.
 - We added a Refresh button to re-load the SharePoint folder, to be used in the event you know something was added to SP since you opened this folder in Synergy Working Files.

Edition Availability

Function	Professional	Business	Enterprise
Document Register	✓	✓	✓
Bulk File Registration	✓	✓	✓
Transmittal Summary	✓	✓	✓
Document Template Reference Numbering	✓	✓	✓
Working Files	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Document Register	✓	✓	✓	✓	✓	✓
Bulk File Registration	✓	✓	✓	✓	✓	✓
Transmittal Summary	✓	✓	✓	✓	✓	✓
Document Template Reference Numbering	✓	✓	✓	✓	✓	✓
Working Files	✓	✓	✓	✓	✓	✓

Improvements and Fixes

- We improved our Xero integration, so when generating a preview inside Synergy, the preview will not time out after 4 minutes.
- Fixed an issue on the Invoice List where invoices were filtered by the Project Office, instead of the office associated to the Invoice.
- Fixed an issue where some Invoices for organisations based in USA weren't displaying appropriately formatted dates from the Invoice List.
- Fixed an issue where changing the date on a specific stage from Project Schedule would always show an error message.
- Fixed an issue where the appropriate filters weren't being applied when accessing the Invoice List from 'Owing Invoices', 'Unpaid Invoices', and 'Total Invoices' links.
- Fixed an issue where some Projects weren't appearing in the criteria when filtering the Revenue Forecast and scrolling down.
- Fixed an issue where Stages and Projects were incorrectly showing a '0' value when filtering the Revenue Forecast to show only Internal numbers, even though the tooltip was displaying the correct values for the revenue associated to the Internal portion.
- Fixed an issue where exporting the Revenue Forecast to a PDF would sometimes rename the columns from the name of the month to 'Forecast Month 1', etc.
- Fixed an issue where you might not have been able to integrate with Xero if you had credit notes attached to significantly aged invoices.

July 2023

Release Date: 16 July 2023

Enhancements

Planning Board Improvements

We've updated the technology used for the Invoices list page which includes some new features and UI changes. We've not only improved how you can add, and customise resourcing to Project Planning, but we've also made this function available to Resource Planning.

New Action Pane

We've introduced a new action pane, that's available from Project Planning, which includes 2 new tabs:

- Stage Details
- Stage Resourcing

So now, whether clicking the Stage or clicking the plus button, you will open the same pane, but depending on which you clicked a different tab will show.

Stage Details tab

From Stage Details you will see the same details, including Name (which can be edited) and the Stage Dependencies. We've added a new Save button and exit button to this pane, and removed the back button. So now you will need to save any changes made, or you can more easily chose to ignore changes and close the pane.

Stage Resourcing tab

Stage Resourcing is where you can be adding new resources and see existing resources assigned to the Stage. You will be able to Add Staff, which is now the default list shown, and you can see Add Roles. If you're using SynergyHR you will have an additional filter available when adding Staff. Much like when adding staff or a Role, you can simply click the Staff or Role to utilise that Staff Member or Role to 100% for the length of that given Stage.

Customise Resources

When clicking Add & Customise, the Customise Resource pane will show. Alternatively, clicking the plus icon from Resource Planning, will open the Customise Resource pane.

When accessing the Customise Resource pane from Project Planning, the Project and Stage will be prepopulated, and can't be changed. You will be able to edit the start and end dates for the resource, and you can also affect how utilised that resource is by inputting a utilised percentage, setting weekly hour total or a total hour allocation.

When accessing the Customise Resource pane from Resource Planning, you will need to select a Project and Stage first, then you can edit the dates and utilisation. To proceed with allocating the resource, click Resource to Stage, or to cancel click the exit icon.

Edition Availability

Function	Professional	Business	Enterprise
Access new Stage action pane and tabs			✓
Add & Customise Resourcing from Project Planning Board			✓
Add & Customise Resourcing from Resource Planning Board			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Access new Stage action pane and tabs			✓	✓	✓	✓
Add & Customise Resourcing from Project Planning Board			✓	✓	✓	✓
Add & Customise Resourcing from Resource Planning Board			✓	✓	✓	✓

Time Scaling

We have new functionality to the Planning Boards so you can zoom in closer to see less months or zoom out to see more.

View Name	Description	Available From
Default	This is the initial, default view for these pages.	<ul style="list-style-type: none">• Project Planning Board• Resource Planning Board• Project Schedule
Weeks	This is the most zoomed in option, focusing on the next few weeks. At a minimum it will show 6 weeks in a maximised browser on a small screen.	<ul style="list-style-type: none">• Project Planning Board• Resource Planning Board• Project Schedule
Months	At a minimum this view will show just over 3 months on a maximised browser on a small screen.	<ul style="list-style-type: none">• Project Planning Board• Resource Planning Board• Project Schedule
Quarters	At a minimum it will show just over 6 months on a maximised browser on a small screen.	<ul style="list-style-type: none">• Project Planning Board• Resource Planning Board• Project Schedule
Year	This is the most zoomed out option and will at a minimum show 12 months on a maximised small screen.	<ul style="list-style-type: none">• Project Planning Board• Project Schedule

You will be able to find a drop-down menu on the top right side of planning boards to switch between timeframes.

Large screens will be able to see more than the minimums when viewing in a maximised browser window.

Edition Availability

Function	Professional	Business	Enterprise
Scaling Drop-down Menu		✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Scaling Drop-down Menu			✓	✓	✓	✓

SynergyFieldBook Updates

Progressive Web Application

We have updated FieldBook to now be accessible from a centralised website, instead of relying on the Apple Mobile Store and the Android Mobile Shop. You will be able to save the new FieldBook to your home screen for both Android and Apple mobile devices.

Improved Search & UI

- We have made some small quality of life improvements to FieldBook:
- Now, by default, you will see any tasks due within the last 30 days, or the next 30 days that are assigned to you.
- When using Search, you will be able to now specify if that you want to show tasks due within the last 90 days or show all tasks due within all active projects with no time limits.
- Searching will now also show Tasks not assigned to you.
- The search is now no longer case sensitive.
- The Phase/Stage Name will now appear on a second line under the Project name.

New Add-On

SynergyPIM - Unified Workspace

Subscription and Configuration

- We made it possible to subscribe to the Unified Workspace. This involves a change to the subscription page. At this stage, it shows a “Project Information Management section” that includes the Unified Workspace, Document Control, Email Management, and a PIM Bundle. In this release, only the Unified Workspace is enabled.
- We have renamed and modified the page where the integration to SharePoint is configured, now named “Connect to PIM”.
- We have separated the feature of Microsoft authentication into a separate “Authenticate” tab, since it will apply to multiple features.
- We have updated the SharePoint integration page to now configure SharePoint and Teams, and it is now called the “Unified Workspace” tab.

Edition Availability

Function	Professional	Business	Enterprise
Subscribe to Unified Workspace	✓	✓	✓
Configure Integration	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Subscribe to Unified Workspace						✓
Configure Integration						✓

Teams Integration

- When new projects are created, a SharePoint Site will now be created per project (most users previously created a site per year, and a folder per project). It is recommended the 'grouping' of project sites should now be done using SharePoint Hub Sites.
- We added a toggle on the Project Details page to optionally create a Teams site for your project. This can be done at the time of creating the project, or at any time in the future.
- When a staff member is added to a project via the project contacts register, they will automatically be added to the Team.

Edition Availability

Function	Professional	Business	Enterprise
Create a Team	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Create a Team		✓	✓	✓	✓	✓

Additional Improvements

- We've made the Invoice List smarter, so when going into and out of Invoices, or navigating through Synergy you the List will be opened in the state it was last left in. The Invoice List will now remember the filters, view, pagination, and page when returning to a page, if done within an hour. When returning to the page, the hour timer will start again.
- You will be able to sort your Invoices by more columns now, including Aged Debtor, Attention Phone, and Attention Email.
- We've improved the right-click capability on the Invoice List, so you can access all the options available in your browser from the List.
- We improved the UI on some Right Menu Panes, specifically removing the back button and it saving an action, and replacing with a Save button and an X icon to exit without saving. This improvements can be seen on:
 - Create Project from Planning Boards
 - Project Details from Planning Boards
 - Edit Task from Planning Boards
 - ToDo List from Project Schedule page
 - Edit ToDo from Project Schedule page
- We also renamed the Teams filter on Analytics Plus to more accurately reflect Primary Team when filtering people.
- We improved the Manager dropdown from Stage Manager, so now it will only be able to change this to an active Staff Member.
- We improved the drag and drop performance and loading of project and stage pills in planning boards.

Fixes

- Fixed 1080p scaling in revenue forecast so that on screens 1080p and above can now see a full 12 months of revenue forecast data.
- Fixed an issue with Invoice List where changing the Views still maintained the previous View's selection.
- Fixed an issue where sometimes when bulk finalising and sending Invoices, you in-app notification didn't appear and Synergy looked frozen.
- Fixed a rare issue where sometimes the Invoice List for a Contact wasn't loading on first attempt.
- Fixed an issue where you weren't able to delete a cancelled Invoice.
- We fixed an issue where setting the Fee/Cap filter to greater than 0 was still showing Projects with a 0 total Fee/Cap.
- Fixed an issue where logging into Synergy as the Account Owner, you could bypass the Single Sign On requirement.

June 2023

Release Date: 18 June 2023

Enhancement

New Invoice List

We've updated the technology used for the Invoices list page which includes some new features and UI changes.

These changes can be accessible from:

- Organisation-wide Invoice list
- Project Invoice list
- Contact Invoice list

Invoices Table

We've updated the Invoice lists table, so now you can sort by the different columns of data, so you can sort by highest/lowest for columns displaying values or alphabetical for all others.

We've also improved the Total display at the bottom of the table. By default, it will show the total Invoices in the list and show totals for all the value columns. But when you select an Invoice by clicking in the checkbox to its left, the Total row will only show the totals for what's selected.

Filters

You can filter your Invoices by the more robust Filter that is used on the Planning Boards and Purchase Orders list pages, this option is accessible from the left of the Invoices page. Unlike the previous filters, you can select multiple criteria from under each filter type, so get more specific results.

The existing filters available from the Invoices page are accessible, these are:

- Draft Status
- Invoice Type
- Invoice Status Type
- Approval Resolutions
- Approvers

We've also added new criteria to filter your Invoices by, these are:

- Invoice Contact
- Invoice Terms
- Invoice Date
- Aged Debtor
- Invoice Total (Inc)

You will also be able to save different filters, and create a default filter to load when opening Invoices.

Invoices Views

The View option is now on the right of the page. You have access to the same four Views:

- Default
- Invoice Contacts
- Aged Debtor
- Invoice Details

Pagination

You have access to the same pagination options:

- 1
- 5
- 10
- 20
- 50
- 100

New Capabilities

Merge Company Contacts

You will be able to 2 merge companies together.

When merging companies together, most information will be associated to 1 company and the other will be archived.

Merging companies together cannot be undone once performed. You can perform multiple merges to the same Company, for example Company B to Company A are

merged, and then Company C can be merged to Company A. All associated data such as Personnel, Projects, and financial data will be reassociated with the selected Company, and the other Company will be set to Inactive.

Merging can affect your connections to accounting packages, always review these connections and your synced contacts after a merge has been completed.

Company Details

By default, Contact Details from the selected company will be used. If the selected company details are empty, those fields will be populated from the company being archived.

Company details include:

- Name
- Website
- Primary email
- Secondary emails
- Status
- Unique ID
- ABN
- ACN
- Phone numbers
- Social links
- Addresses
 - Street
 - Postal
 - Billing
 - Other
- Account Manager
- Tags
- Roles
- Custom fields

Associated Data

All these will be merged to the single company:

- Invoices
- Credits
- Bills
- Documents & folders

- Project contacts
- Bills & notes
- Transactions
- CRM Data
- Portal Data
- Purchase orders

Merge Comparison

The Merge Comparison Interface will display key details for the 2 companies being merged, and you will be able to select which one to keep. Merging will keep the Company Details for this contact unless empty.

This is the information shown:

Field	Display
ABN	Company ABN
Address	Primary Address, unless blank then will show secondary Address
Phone	Primary Phone, unless blank then will show secondary Phone
Email	Primary Email, unless blank then will show secondary Email
Contact ID	Unique Company Identifier
Personnel	Total Personnel count
Active Projects	Total Active Projects count
Invoices	Total invoice count
Tags	Tags in contact library (total tag count and a selection of tags)

Edition Availability

Function	Professional	Business	Enterprise
Merge Contacts	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Merge Contacts					✓	✓

Automated Finalising & Sending Invoices

You will be able to select multiple Draft Invoices and finalise and send those invoices in bulk.

Using the new filters from the Invoices list and sorting them by the different columns, you can specify and select the Draft Invoices you want to finalise and send.

Once you have confirmed you want to finalise and send your Invoices, your Invoices will begin processing, and will be sent out one at a time.

You will get a notification when this process has finished and you will be able to access a report that shows the success of each Invoice.

Edition Availability

Function	Professional	Business	Enterprise
Bulk Finalise and Send			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Bulk Finalise and Send			✓	✓	✓	✓

Additional Improvements

- The new pagination options of 250 and 500 are now available for Purchase Orders.
- You can now export data from Analytics + into a Microsoft Excel file.
- We've added an option for "Add Stages from Timesheet" in the Security Matrix, which by default will be set for Assistant Project Managers and above.

Fixes

- Fixed an issue where sometimes hours from Resource Planning page was showing inaccurate numbers when editing.
- Fixed an issue that was sometimes causing the Purchase Order page not to load.
- Fixed an issue where Project Manager with no Aged WIP were still showing on the Finance graph in Analytics.
- Fixed an issue where unapproved leave was sometimes showing from Resource Planning and forcing inaccurate utilisation for a given staff member.
- Fixed a rare issue where some Teams weren't able to be filtered from Analytics + dashboards.

May 2023

Release Date: 14 May 2023

New Capability

Save and Load Filters

You can now Save the filter criteria for some pages, and load those saved filters easily. When saving a filter, you can select to have that filter be used as the default for that specific page. You can also edit the default filter from the Load Filter pane. If you had previously set a default filter to be remembered, these criteria will be saved and maintained. Saved Filters are not shareable, they are specific only to the individual user.

You can save and load filters on the following pages:

- Project Planning
- Resource Planning
- Project Schedule
- Revenue Forecast
- Purchase Orders
- The following configuration pages:
 - Cost centres
 - Disciplines
 - Project types
 - Payment terms
 - Payment types
 - Write-off reasons
 - Roles
 - Titles
 - Contact status
 - Invoice numbers
 - Credit numbers
 - Overtime rates
 - Standard project tasks

We have also simplified the interactions with the Filter pane, so now you will see all available criteria, always. We've also removed the "Remember filter" option, and instead you can set a filter to be your default.

Edition Availability

Function	Professional	Business	Enterprise
Save Filters	✓	✓	✓
Load Filters	✓	✓	✓

% Complete on Revenue Forecast

From the Revenue Forecast, you will now be able to see and edit the % Complete for a Stage.

The % Complete will show in the tooltip for the Stage, and you can also see the % Complete to the left of the Stage from the right pane. Clicking on the % Complete will open the % Complete Slider.

Edition Availability

Function	Professional	Business	Enterprise
See % Complete	✓	✓	✓
Edit % Complete	✓	✓	✓

Performance Improvements

We've made some behind-the-scenes improvements to the Planning Boards and Work Breakdown.

Planning Boards

We've improved five key actions which our analytics informed us we were taking the longest to complete. These improvements are:

- Bulk Update Resourcing Weekly Hours
- Update Project Dates
- Remove Role
- Update Stage
- Update Stage Dates

Work Breakdown

We've also focused on the Work Breakdown, specifically general page performance if the organization has lots of rate variations.

Performance Tracking

Measuring performance is key for us to find new opportunities to improve the software, and we added additional loggings to track times for Work Breakdown and timesheets.

Additional Improvements

We've added a new filter for Primary Team, which will show on Project Planning, Project Schedule, Resource Planning, and Leave Calendar.

Fixes

- We've Fixed an issue where sometimes an API get request was not populating data for Created Dates and Updated Dates
- Fixed an issue where some Contacts were not deleting correctly.

April 2023

Release Date: 16 April 2023

New Capability

Bills Security Matrix

We've exposed four key capabilities to the Security Matrix to do with Bills. We've added a new category for Bills, with the following capabilities:

- Read
- Create
- Edit
- Unlock

Edition Availability

Function	Professional	Business	Enterprise
View Security Matrix for Bills	✓	✓	✓
Edit Security Matrix for Bills			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Read	✓	✓	✓	✓	✓	✓
Create	✓	✓	✓	✓	✓	✓
Edit	✓	✓	✓	✓	✓	✓
Unlock						✓

Improvements

Document Templates

We've made some improvements to bookmarks for Document Templates.

Transaction Table

Now you can use the Transaction Table in Project Document Templates; you're not limited to Invoice Documents. You can now also add a Stage Header row to the Transaction table, which replicates the existing functionality of a Phase Header row, including bookmarks for:

- Currency Symbol
- Stage Name
- Stage Total No Units
- Stage Total Charge
- State Total Charge Foreign Currency
- Stage Total Tax
- Stage Total Charge (incl tax)

Other Improvements

- We added Phase Description as a new Bookmark to the Fee Details Table.
- We improved the Sub Total calculation for Fee Proposal in the Proposal Document, because in some instances it displayed the 'Cap Available' amount.
- In some cases, the bookmarks for Primary Personnel Postal Address or Primary Personnel Street Address in document templates weren't generating data when they were used.

Edition Availability

Function	Professional	Business	Enterprise
Transaction Table available for Project Document Templates	✓	✓	✓
Stage Header in Transaction Table	✓	✓	✓

Settings Pages

We've updated some settings pages, and now you will be able to edit data in the table and sort the tables by the columns. Updated pages include:

Settings Menu	Page
Project Lists	<ul style="list-style-type: none">• Cost centres• Disciplines• Project types• Payment terms• Payment types• Write-off reasons
Contact Lists	<ul style="list-style-type: none">• Roles• Titles• Contact status
Organisation	<ul style="list-style-type: none">• Invoice numbers• Credit numbers• Overtime rates
Timesheets	<ul style="list-style-type: none">• Standard project tasks

The bulk actions for Delete, Set Active, Set not active are not available for these configuration pages.

Additional Improvements

- We have improved the performance around Invoicing, specifically when Creating a Draft Invoice and Finalising an Invoice. You will see the most improvement if you heavily use Rates, Rate Groups and rate changes.
- We've added a new API endpoint for Updating Staff Costs, which creates a new Staff Cost record with an Effective From date.
- We've also added a new endpoint that rolls back the Staff Costs, which deletes a record.

Fixes

Fixed an issue where Custom Fields are missing data when using a Template to create a Project.

March 2023

Release Date: 19 March 2023

New Feature

Invoice Approvals

We have introduced new features to support approvals for Invoices.

- You will be able to create one or more Approvals for a Draft Invoice.
- The assigned Approver will get notified in Synergy (and via email) then they can Approve or Reject the Approval.
- You will be able to utilise Synergy's reporting with 6 new standard reports and new reporting fields available for you to build your own.

Approval Pane

There is a new side pane that can be accessed from the right side of a Draft Invoice by clicking the Approval icon. This pane will show any Approvals for that Draft Invoice, and from there, you can Add an Approval.

Adding an Approval

You can add an Approval only for a Draft Invoice.

When adding an Approval, you must select an Approver, which has to be an active Staff member. The drop-down will prioritise Recent Approvers, Project Contacts, and then all other Staff.

By default, an Approval will be marked as Required, but you can uncheck this box to set any Approval to Optional.

Required and Optional Approvals

There are two types of Approvals:

Required	A Required Approval means that you cannot finalise the Invoice until that Approval is set to Approved.
Optional	An Optional Approval means that you can finalise the Invoice, even if it's not set to Approved.

If you try and finalise an Invoice with a Required Approval set to Pending or Rejected, a warning message will let you know that there are pending Approvals.

By default, any Director will be able to bypass this limitation and can select to bulk Approve the Required Approvals for that given Draft Invoice. This feature can be set to different users from the Security Matrix.

Approval Resolutions

There are 3 Resolutions an Approval can be set to:

- Pending
- Approved
- Rejected

When an Approval is created, by default, it will be set to Pending.

Invoice List

We've introduced 2 new criteria that you can filter your Invoices by. The new filters are:

- Approver
- Invoice Resolution

These filters can be used individually or in combination.

Reporting

We've introduced a new category to the Invoices section of reporting.

Reporting Category/Sub-Category	New Columns/Reporting Criteria
Approvals	<ul style="list-style-type: none"> • Approval Resolution • Approval Required • Approval Date • Approval Date First Day of the Week • Approval Date First Day of the Month • Approval Date Weeks Since • Approval Date Weeks Until
Approver	<ul style="list-style-type: none"> • All existing Staff fields • Approver Created by • Approver Date updated • Approver Updated by
Approved by	<ul style="list-style-type: none"> • All existing Staff fields • Approved By Created By • Approved By Date Updated • Approved By Updated By

In combination to these new reporting fields, we've introduced 6 new default reports:

Report Name	Default Filters	Shown data
Invoices – Current Pending Approvals	<ul style="list-style-type: none"> • Invoice type (Invoice) • Invoice Date (This month) • Approval Resolution (Pending) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax) • Approval Date

Report Name	Default Filters	Shown data
Invoices – All Approvals by Date	<ul style="list-style-type: none"> • Invoice type (Invoice) • Invoice Date (Previous 90 days) • Approval Resolution (All) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax) • Approval Date
Invoices – Current Pending Approvals by Approver	<ul style="list-style-type: none"> • Invoice type (Invoice) • Approval Resolution (Pending) • Approver Name (Empty) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax)
Invoices – Current Pending Approvals by Office	<ul style="list-style-type: none"> • Invoice type (Invoice) • Approval Resolution (Pending) • Approver Name (Empty) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax) • Approval Date

Report Name	Default Filters	Shown data
Invoices – Current Pending Approvals by Project Manager	<ul style="list-style-type: none"> • Invoice type (Invoice) • Approval Resolution (Pending) • Project Manager Name (Empty) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax) • Approval Date
Invoices – Current Rejected Approvals	<ul style="list-style-type: none"> • Invoice type (Invoice) • Approval Resolution (Rejected) • Invoice Draft Status (All) 	<ul style="list-style-type: none"> • Invoice Number • Invoice date • Status • Approval Required • Approver Name • Approval Resolution • Due date • Project Number and Name • Invoice amount (ex tax & inc tax) • Approval Date

Security Matrix

We've added four new options for the Security Matrix

Action	What it can do
Add Approval	Be able to Add an Approval and assign an Approver
Delete Approval	Be able to Delete Approval
Update Approval	Set Approval to "Approved" or "Rejected" or "Pending" or "Required" or "Optional"
Override Required Approvals	Allows you to bulk approve pending/rejected approvals when trying to finalise an Invoice.

Edition Availability

Function	Professional	Business	Enterprise
Invoice Approvals			

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Add Approval		✓	✓	✓	✓	✓
Delete Approval			✓	✓	✓	✓
Update Approval			✓	✓	✓	✓
Override Required Approvals				✓	✓	✓

New Add-On

Synergy Analytics Plus

Our new Add-on is an extension of the Analytics feature available in Synergy Enterprise Edition. Analytics Plus includes anywhere from 4 to 5 interactive dashboards for each of the different organisational categories and many more filters and data controls.

The dashboards are broken down into 5 categories:

- Business
- Finance
- Sales
- Projects
- People

Dashboard UX

Much like Analytics, all dashboards are interactive, so, for example, you can click on bars in graphs and legends for charts to filter the information and details displayed. You can also use Ctrl click to select multiple points of data to filter to.

You can expand any of the graphs to take your data to full screen for a closer look, that is especially useful when interacting with any busy chart or detailed list.

You can right-click on most data, and there will be various options for interacting with it, so you can better exclude a chart or figure, or select it.

You can also use the Drill through option for Projects, which provide even more insight for a given Project, focusing on a more complete snapshot of that given Project.

The various widgets, charts, and lists were named to be as detailed as possible, and dynamic. So, in some cases, depending on the filters being used, the names of widgets will change.

For any Project data, Internal Projects are excluded. Dashboards are refreshed every 24 hours.

Business

There 5 distinct dashboards which demonstrate your business insights, showing your revenue, breaking down your WIP. These pages will offer a multitude of ways to categorise, filter and segment your business data.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>Overview</p> <p>Provides high level insights into your Invoice Revenue or Total Charges on a month-to-month basis and your WIP recovery.</p> <p>This is similar to Business Dashboard in Analytics, including the ability to filter your data by Office and view it either Monthly or Cumulative.</p>	<p>Total Charge graph</p> <ul style="list-style-type: none"> • Y axis represents Invoiced Revenue and Total Charges, X axis represents months • Bar chart <p>WIP Breakdown & Recovery</p> <ul style="list-style-type: none"> • Y axis represents Invoice Value/Total Charge, X axis represents months • Also represented by months • Bar chart / Line chart <p>Totals</p> <ul style="list-style-type: none"> • Rounded to the nearest 1000 • Widgets include: <ul style="list-style-type: none"> - Invoiced Revenue - Total Charge - WIP Total - WIP > 60 Days - Debtors > 60 Days 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Start and End dates</p> <ul style="list-style-type: none"> • Even though you can specify a day of the month, you will always see all data for any given month <p>Monthly or Cumulative</p> <ul style="list-style-type: none"> • Show either totals for that month, or cumulative totals.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Business) Performance</p> <p>Inspects the Total Charge by Transaction Date and Invoiced Revenue even closer.</p> <p>This page will show not only a larger view of the Total Charge, but also show you Total Charge and Invoiced Revenue broken down by segments.</p>	<p>Invoiced Revenue vs Total Charge</p> <ul style="list-style-type: none"> This will represent the values against each other Semi-circle donut chart <p>Segmented Total Charge & Invoiced Revenue</p> <ul style="list-style-type: none"> Y axis represents a definable segment, X axis represents Total Charge & Invoiced Revenue Y axis segments include: <ul style="list-style-type: none"> Office Cost Centre Discipline Bar chart <p>Total Charge graph</p> <ul style="list-style-type: none"> Y axis represents Revenue, X axis represents months This will show Total Charges for a given month against the Invoiced Revenue for that same month Will also display the Invoiced Revenue from the Previous year for more context Bar chart 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Manager <p>Start and End dates</p> <ul style="list-style-type: none"> Even though you can specify a day of the month, you will always see all data for any given month <p>Monthly or Cumulative</p> <ul style="list-style-type: none"> Show either totals for that month, or cumulative totals.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Business) WIP Recovery</p> <p>A closer inspection of WIP recovery.</p> <p>This page will show a large graph for Total Charge and Recovery %, but also show your recovery % organised into segments.</p>	<p>Recovery %</p> <p>Recovery % by segments</p> <ul style="list-style-type: none"> • Y axis represents a value, X axis represents months • The bars representing Total Charge are segmented, and include: <ul style="list-style-type: none"> - Office - Cost Centre - Discipline • Recovery is represented by a line on top of the bars • Bar chart / line chart <p>Total Charge and Recovery %</p> <ul style="list-style-type: none"> • Displayed in months • Y axis represents a Total Charge and Recovery %, X axis represents months • Bars will be comprised of multiple categories: <ul style="list-style-type: none"> - Draft Invoice - Invoiced - WIP - Written off 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Start and End dates</p> <ul style="list-style-type: none"> • Even though you can specify a day of the month, you will always see all data for any given month <p>Monthly or Cumulative</p> <ul style="list-style-type: none"> • Show either totals for that month, or cumulative totals.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Business) Revenue Analysis</p> <p>This will display where your revenue is coming from, and present your revenue broken down in a number of specific ways.</p> <p>The Organise by Filter is critical to making the most of this dashboard.</p>	<p>Invoiced Revenue by Date</p> <ul style="list-style-type: none"> • Y axis represents value, X axis represents months • Each month can display 2 bars: <ul style="list-style-type: none"> - Total Charge - Invoiced Revenue • Bar chart <p>Invoiced Revenue</p> <ul style="list-style-type: none"> • This graph will show the breakdown of revenue by various segments under what you're filtering the page by • Pie chart <p>Invoiced Revenue by Client or Project</p> <ul style="list-style-type: none"> • Will list out the different projects as filtered, sorted by revenue total • Bar chart 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Start and End dates</p> <ul style="list-style-type: none"> • Even though you can specify a day of the month, you will always see all data for any given month <p>Organise by</p> <ul style="list-style-type: none"> • Office • Project Type • Cost Centre • Discipline • Project Size

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Business) Profitability</p> <p>This dashboard will show you the profitability of your completed projects.</p> <p>Only completed pages will be shown on this page, and they are organised by Project End Date.</p> <p>This is a highly interactive page, that will display Projects that fit the displayed criteria. You can interact with the bar graphs themselves, so clicking on an Office in the top left widget, will only show data in the other widgets that fit under that Office.</p>	<p>Project %</p> <ul style="list-style-type: none"> • Projects are broken down into segmented widgets, which include: <ul style="list-style-type: none"> - Office - Project Type - Primary Contact - Cost Centre - Discipline • For each chart, the Y axis represents segment, and the X axis represents the profit % • Bar chart <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here • They will include various detail, including: <ul style="list-style-type: none"> - Project Number and Name - Profit % - Profit - Invoiced - Costs - Client Name • Data table 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Project Status</p> <ul style="list-style-type: none"> • Profitability will only be shown for Complete projects <p>Costs</p> <ul style="list-style-type: none"> • Chose to show Actual or Standard Costs <p>Start and End dates</p> <ul style="list-style-type: none"> • The Date range is filtering Project end dates

Finance

There 4 distinct dashboards which demonstrate your financial insights, focussed on presenting WIP, debtor and write-off analysis.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Finance) Overview</p> <p>Provides high level insights into your WIP and Debtors.</p> <p>This is similar to Finance Dashboard in Analytics, including the ability to filter your data by Office and include Not Due data.</p>	<p>WIP > 60 Days</p> <ul style="list-style-type: none"> This will show you the total WIP exceeding 60 days <p>Aged WIP</p> <ul style="list-style-type: none"> Y axis represents Ageing categories, X axis represents value of WIP Data shown in Ageing categories, which include: <ul style="list-style-type: none"> 0-30 days 31-60 days 61-90 days Bar chart <p>WIP > 60 Days</p> <ul style="list-style-type: none"> This will show you the total WIP exceeding 60 days <p>Aged Debtors</p> <ul style="list-style-type: none"> Y axis represents Ageing categories, X axis represents value of debt Data shown in Ageing categories, which include: <ul style="list-style-type: none"> 0-30 days 31-60 days 121+ days Bar chart 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Manager <p>Start and End dates</p> <ul style="list-style-type: none"> Even though you can specify a day of the month, you will always see all data for any given month <p>Monthly or Cumulative</p> <ul style="list-style-type: none"> Show either totals for that month, or cumulative totals.

	<p>Aged WIP</p> <ul style="list-style-type: none">• Y axis represents a definable segment, X axis represents a value• The definable segments are:<ul style="list-style-type: none">- Project Manager- Primary Contact- Project• No matter how you filter the graphs, bars will be divided into the Ageing categories• Bar chart <p>Aged Debtors</p> <ul style="list-style-type: none">• Y axis represents a definable segment, X axis represents a value• The definable segments are:<ul style="list-style-type: none">- Project Manager- Invoice Contact- Project• No matter how you filter the graphs, bars will be divided into the Ageing categories• Bar chart	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Finance) WIP Analysis</p> <p>This is a closer inspection to WIP, providing more insights into WIP and showing data at a Project level, with the ability to drill down into phases and stages.</p> <p>This shows WIP broken down into different categories to give comprehensive context, including visibility over Future WIP.</p>	<p>WIP by Transaction Date</p> <ul style="list-style-type: none"> Y axis represents total transaction value, X axis represents months Bars will be broken down by Status Bar chart <p>WIP total</p> <ul style="list-style-type: none"> This will show you the total WIP Rounded to nearest 1000 <p>WIP > 60 Days</p> <ul style="list-style-type: none"> This will show you the total WIP exceeding 60 days Rounded to nearest 1000 <p>Aged WIP by Project Manager</p> <ul style="list-style-type: none"> Y axis represents Ageing categories, X axis represents value of WIP Data shown in Ageing categories, which include: <ul style="list-style-type: none"> - Future WIP - 0-30 days - 31-60 days - 61-90 days Bar chart <p>Aged WIP by Client or Project</p> <ul style="list-style-type: none"> Y axis represents a definable segment, X axis represents WIP value 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Manager <p>Transaction Status</p> <ul style="list-style-type: none"> Draft Invoice WIP <p>Transaction Date</p> <ul style="list-style-type: none"> Flexible controls for dates

	<ul style="list-style-type: none"> • Definable segments include: <ul style="list-style-type: none"> - Client - Project name • Data shown in Ageing categories, which include: <ul style="list-style-type: none"> - Future WIP - 0-30 days - 31-60 days - 61-90 days • Bar chart <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it • Data can be filtered to Phase and Stage details • Will show WIP by month, and the Total WIP • Data table 	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Finance) Revenue Debtors Analysis</p> <p>This is a closer inspection to Debtors, providing more insights into Debtors and showing Debtors at a Project level, with the ability to drill down into phases and stages. This presents WIP broken down into different categories to give a more completed analysis.</p>	<p>Invoice Owing Transaction Date</p> <ul style="list-style-type: none"> • Y axis represents a Invoice Owing value, X axis represents months • Bar chart <p>Debtors total</p> <ul style="list-style-type: none"> • This will show you the total Debtors • Rounded to nearest 1000 <p>Debtors > 60 Days</p> <ul style="list-style-type: none"> • This will show you the total Debtors exceeding 60 days • Rounded to nearest 1000 <p>Aged Debtors by Project Manager</p> <ul style="list-style-type: none"> • Y axis represents a Project Managers, X axis represents Aged Debtors value • Data shown in Ageing categories, which include: <ul style="list-style-type: none"> - 0-30 days - 31-60 days - 121+ days • Bar chart <p>Aged Debtors by Client or Project</p> <ul style="list-style-type: none"> • Y axis represents a definable segment, X axis represents Aged Debtors value • Definable segments include: <ul style="list-style-type: none"> - Client - Project name 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Transaction Date</p> <ul style="list-style-type: none"> • Flexible controls for dates

	<ul style="list-style-type: none">• Data broken up into Ageing categories, which include:<ul style="list-style-type: none">- 0-30 days- 31-60 days- 121+ days• Bar chart <p>Projects List</p> <ul style="list-style-type: none">• Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it• Data can be filtered to Phase and Stage details• Will show WIP by month, and the Total WIP• Data table	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Finance) Write-Off Analysis</p> <p>This is a closer inspection to Write-Offs, providing more insights into Write-Offs and showing data at a Project level, with the ability to drill down into phases and stages. This shows WIP broken down into different categories to give a more completed analysis.</p>	<p>Written-Off Charge by Transaction Date</p> <ul style="list-style-type: none"> • Y axis represents a value, X axis represents months • Will present data by transaction type • Bar chart <p>Written-Off Charge total</p> <ul style="list-style-type: none"> • This will show you the Write-Off Total • Rounded to nearest 1000 <p>Written-Off Charge by Project Manager</p> <ul style="list-style-type: none"> • Y axis represents a Project Manager, X axis represents Write-Off Charge value • Bar chart <p>Written-Off Charge by Client or Project</p> <ul style="list-style-type: none"> • Y axis represents a definable segment, X axis represents Written-Off Charge value • Definable segments include: <ul style="list-style-type: none"> - Client - Project name • Bar chart <p>Won Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it • Data table 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Transaction Date</p> <ul style="list-style-type: none"> • Flexible controls for dates

Sales

There 4 distinct dashboards which demonstrate your sales data in Synergy, focused on presenting proposals, forecast and statistics on wins and losses.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Sales) Overview</p> <p>Provides high level insights into ongoing proposals and when they're expected to start, as well as breaking down your proposals and reviewing your wins and losses.</p> <p>This is similar to Projects Dashboard in Analytics, including the ability to filter your data by Office and specify whether your data is Weighted or not.</p>	<p>Proposals this month</p> <ul style="list-style-type: none"> This will show the total value for Proposal Projects starting this month <p>Proposals before this month</p> <ul style="list-style-type: none"> This will show the total value for Proposal Projects that have started before the current month <p>Fee/Cap by Start Date</p> <ul style="list-style-type: none"> Y axis represents a value, X axis represents months Months are broken down by Project Status Bar chart <p>Fee Cap for Projects</p> <ul style="list-style-type: none"> Y axis represents a definable segment, X axis Fee/Cap value Definable segments include: <ul style="list-style-type: none"> Project Manager Client Project Status Bar chart <p>Won Projects</p> <ul style="list-style-type: none"> The total of Won Projects in the last 12 months <p>Win Ratio %</p>	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Manager <p>Weighted/Unweighted</p> <p>If the project doesn't have a start date, it will be included in current month. It is recommended to set start date for all projects to get more accurate values/report.</p>

	<ul style="list-style-type: none"> • The total percentage of Won Projects against lost projects over the last 12 months <p>Win Ratio</p> <ul style="list-style-type: none"> • The total value of Won Projects in the last 12 months • Calculated from the total projects that have been won against proposals that have been issued <p>Projects by Start Date</p> <ul style="list-style-type: none"> • Y axis represents a project total values, X axis represents months • Each bar is broken down by: <ul style="list-style-type: none"> - Won - Lost - Decision Pending • Will show Projects and Totals from the last 12 months • Bar chart <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it • Data can be filtered to Phase and Stage details • Will show Write-Off by month, and the Total Write-Offs • Data table 	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Sales) Ongoing Proposals</p> <p>This is a closer inspection to Proposals, providing CRM like dashboard with insights most around before the current month, this month, next month and following next month. Being able to drill down on Projects starting prior to this month will let you find projects which either have the wrong date, or unsuccessful projects.</p>	<p>Proposals by Fee/Cap</p> <ul style="list-style-type: none"> • Filterable by: <ul style="list-style-type: none"> - Office - Cost Centre - Discipline - Project Manager • Bars divided into: <ul style="list-style-type: none"> ▪ Before this Month ▪ This Month ▪ Next Month ▪ After Next Month • Sorted by highest value • Bar chart <p>Proposals by Project Start Date</p> <ul style="list-style-type: none"> • Data shown for <ul style="list-style-type: none"> - Before this Month - This Month - Next Month - After Next Month <p>Proposals by Contact or Project</p> <ul style="list-style-type: none"> • Can be sorted by: <ul style="list-style-type: none"> - Primary Contact - Project • Bars divided into: <ul style="list-style-type: none"> - Before this Month - This Month - Next Month - After Next Month • Sorted by highest value • Bar chart <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager • Project Status Group <ul style="list-style-type: none"> - By default this will only show Proposals, but you can also filter to Active projects as well as, or instead of <p>Weighted/Unweighted</p>

	<ul style="list-style-type: none">• Multiple columns are displayed, and you can sort your Projects by these columns<ul style="list-style-type: none">▪ Project Number▪ Project Name▪ Project Status▪ Stage Status▪ Start Date▪ Fee/Cap▪ Success Factor▪ Weighted▪ Project Manager▪ Primary Contact• Clicking the Project Number will open the Project in a new tab	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Sales) Revenue Pipeline</p> <p>The pipeline dashboard provides insights by showing you 12 months worth of revenue, and showing how the composition of that revenue across the various projects.</p>	<p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here, but you can also select a Project and see the relevant information for it • Multiple columns are displayed, and you can sort your Projects by these columns <ul style="list-style-type: none"> - Project Number - Project Name - Start Date - Fee/Cap - Forecast - Primary Contact • Clicking the Project Number will open the Project in a new tab <p>Forecast by State Status</p> <ul style="list-style-type: none"> • Will show your projects values (rounded to the nearest 1000) • Pie chart <p>Forecast by Project Size</p> <ul style="list-style-type: none"> • Data will be broken down into 3 categories: <ul style="list-style-type: none"> - Less than 10000 - 10,001-25,000 - 25,001-100,000 - More than 100,000 • Pie chart <p>Forecast by Cost Centre</p> <ul style="list-style-type: none"> • Pie chart <p>Forecast by Cost Discipline</p> <ul style="list-style-type: none"> • Pie chart <p>Forecast by Project Type</p> <ul style="list-style-type: none"> • Pie chart 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager <p>Fee/Cap or Forecast</p> <p>Weighted/Unweighted</p>

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Sales) Win/Loss Analysis</p> <p>Focused on providing detailed win/loss information and comparing your wins against your losses. It's a powerful dashboard that can provide great insights to where the business might need to focus more in the future.</p> <p>Won projects include projects that are in Active, Complete or Pending Invoice within the selected time frame.</p> <p>Lost projects include projects that are in an unsuccessful state.</p>	<p>Win Ratio %</p> <ul style="list-style-type: none"> The total percentage of Won Projects against lost projects over the selected date range <p>Win Ratio</p> <ul style="list-style-type: none"> The total value of Won Projects over the selected date range Calculated from the total projects that have been won against proposals that have been issued <p>Win by Month</p> <ul style="list-style-type: none"> Organised per office Will show you the last 12 months Line chart <p>Win Ratio by Office</p> <ul style="list-style-type: none"> Each bar will show Won and Lost Projects Bar chart <p>Win Ratio by segments</p> <ul style="list-style-type: none"> View your win ratio by: <ul style="list-style-type: none"> Office Project Type Cost Centre Discipline Project Size Bar chart 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Value or Count Organise per <p>Project Start Date</p>

Projects

There 4 distinct dashboards which demonstrate insights into your Projects, with filters that give you control to analyse projects that fit the criteria that's relevant for you and the ability to easily go to and find projects.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Projects) Overview</p> <p>Provides high level insights into your Projects, including analysis by different relevant project data.</p> <p>This is similar to Projects Dashboard in Analytics, including the ability to filter your data by Office.</p>	<p>Value by Project Manager</p> <ul style="list-style-type: none"> Sorted by the Project Manager responsible for the largest value (descending) Bar chart <p>Value by Client</p> <ul style="list-style-type: none"> Sorted by the Client's associated to the largest value projects (descending) Bar chart <p>Value by Project Type</p> <ul style="list-style-type: none"> Sorted by the Project Types with the largest value (descending) Bar chart <p>Value by Cost Centre</p> <ul style="list-style-type: none"> Sorted by the Cost Centre with the largest value (descending) Bar chart <p>Value by Discipline</p> <ul style="list-style-type: none"> Sorted by the Disciplines with the largest value (descending) Bar chart <p>Projects List</p> <ul style="list-style-type: none"> Projects meeting the filtered criteria will show here, but you can also select a Project 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Status Stage Status <p>Display Value</p> <ul style="list-style-type: none"> This will affect what values displayed across the dashboard, and the names of the widgets will be updated Options include: <ul style="list-style-type: none"> Agreed Fee/Cap Fee/Cap Total Charge Residual Net Residual Written Off

	<p>and see the relevant information for it</p> <ul style="list-style-type: none">• Multiple columns are displayed, and you can sort your Projects by these columns<ul style="list-style-type: none">- Project Number- Project Name- Value- Project Status- Agreed Fee/Cap- Fee/Cap- Total Charge- Net Invoiced- Residual- WIP Total- Net Residual- Written Off• Clicking the Project Number will open the Project in a new tab	
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Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Projects) Snapshot</p> <p>Snapshot displays multiple key metrics to provide as much insight to your projects as possible. When used in combination with the filters and the calculated Totals, you will have a high-level overview and summaries for multiple segmented or grouped projects.</p>	<p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here • Multiple columns are displayed, and you can sort your Projects by these columns <ul style="list-style-type: none"> - Project Number - Project Name - Project Status - Fee/Cap - Total Charge - Fee Worked % - Complete % - Revenue Ex Tax - Residual - WIP Total - Net Residual - Debtors - Recovery % - Profit % • Clicking the Project Number will open the Project in a new tab • Using Drill through to Project Details (accessible from the context menu) will provide even more Project information and details, including stage data 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager • Project Status <p>Project Number</p> <ul style="list-style-type: none"> • Search field

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Projects) Financials</p> <p>This is a focused dashboard on the charge, revenue and costs for your Projects.</p>	<p>Totals by Transaction Date</p> <ul style="list-style-type: none"> • For each month will show: <ul style="list-style-type: none"> ▪ Total Charge ▪ Invoiced Revenue ▪ Total Costs • Bar chart with line graph <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here • Multiple columns are displayed, and you can sort your Projects by these columns <ul style="list-style-type: none"> - Project Number - Project Name - Recovery % - Invoiced Revenue - Invoiced Charge - Total Charge - Total Costs - Internal Cost - External Cost - Expense Cost • Clicking the Project Number will open the Project in a new tab • Using Drill through to Project Details (accessible from the context menu) will provide even more Project information and details, including stage data 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager • Project Status <p>Cost Display Value</p> <ul style="list-style-type: none"> • Can display Actual or Standard <p>Project Number</p> <ul style="list-style-type: none"> • Search field <p>Transaction Date</p> <ul style="list-style-type: none"> • Flexible controls for dates

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Projects) Forecasting</p> <p>An easy-to-follow breakdown of your forecasting data from Synergy, with a month by month projection based on your project financials and a listing to provide details for your projects.</p>	<p>Revenue Forecast by Month</p> <ul style="list-style-type: none"> • Will show 12 months of data, starting with the current payment • Data for each month be broken down into: <ul style="list-style-type: none"> - Active - On Hold - Proposal • Bar chart <p>Projects List</p> <ul style="list-style-type: none"> • Projects meeting the filtered criteria will show here • Multiple columns are displayed, and you can sort your Projects by these columns <ul style="list-style-type: none"> - Project Number - Project Name - Stage Name - Stage Status - Fee/Cap - Residual • Clicking the Project Number will open the Project in a new tab • Using Drill through to Project Details (accessible from the context menu) will provide even more Project information and details, including stage data 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Cost Centre • Discipline • Project Manager • Project Status • Stage Status <p>Weighted/Unweighted</p>

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(Projects) Map</p> <p>Displays your project information focusing on location, with an interactive map.</p> <p>This Dashboard must be manually enabled through the Analytics Plus Security Matrix.</p>	<p>Map</p> <ul style="list-style-type: none"> Shows location of jobs on a world map Hovering over each location will provide job details Map is interactive with zoom and repositioning capability <p>Project Fee by Office</p> <ul style="list-style-type: none"> Will show the breakup of your project fees by office location Pie chart <p>Project Fee by Client per Office</p> <ul style="list-style-type: none"> Will show the breakup of your project fees by client, also delineating fee by office Sorted by client with the largest project fee value 	<p>Data Filters:</p> <ul style="list-style-type: none"> Office Cost Centre Discipline Project Manager Project Status Organise By <p>Date controls</p>

People

For an overview of the people within your organisation, we have 4 dashboard designed to provide insights to teams and individuals, with a focus on utilisation.

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(People) Overview</p> <p>This is more of a Team overview with high level oversight for Teams' Hours and Utilizations.</p> <p>The Overview dashboard is quite different to the People dashboard in Analytics, with only some similarities.</p>	<p>Hours & Utilisation</p> <ul style="list-style-type: none"> • Hours are broken down into: <ul style="list-style-type: none"> - Utilised - Non-Utilised - Leave • Will also show utilisation % (as line) • Bar chart / Line Chart <p>Hours per Staff by Period</p> <p>Utilisation %</p> <ul style="list-style-type: none"> • Can be sliced to show: <ul style="list-style-type: none"> - Office - Team - Team Member • Can show: <ul style="list-style-type: none"> - Per week - Per month • Data table <p>Hours</p> <ul style="list-style-type: none"> • Sorted by: <ul style="list-style-type: none"> - Project - Stage Name - Task 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Team • Reports To • Rate Name <p>Date controls</p>

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(People) Headcount</p> <p>A dashboard focused on the organisation's headcount and what makes up that number.</p>	<p>Active Headcount</p> <ul style="list-style-type: none"> Total active headcount <p>Active FTE</p> <ul style="list-style-type: none"> Total active headcount displayed as FTE <p>FTE/Headcount per Office</p> <ul style="list-style-type: none"> Total headcounts by months Will segment data by office Bar chart <p>Employee Turnover %</p> <ul style="list-style-type: none"> percentage of exited staff against total of staff at beginning of that time period <p>Joiners</p> <ul style="list-style-type: none"> Sum of new starts in date range <p>Leavers</p> <ul style="list-style-type: none"> Sum of exited staff in date range <p>Joiners, Leavers & Employee Turnover %</p> <ul style="list-style-type: none"> Displayed by month Dedicated bars for: <ul style="list-style-type: none"> Joiners Leavers Line graph for Employee Turnover Bar chart <p>FT/Headcount per Office</p> <ul style="list-style-type: none"> A breakdown of heads per office Pie chart 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Team Reports To Rate Name <p>Organise per:</p> <ul style="list-style-type: none"> Office Team Rate Name <p>Headcount or FTE</p> <p>Date controls</p>

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(People) Utilisation</p> <p>An organization wide dashboard designed to demonstrate utilisation, with the ability to drill down to Office or Team or an individual.</p> <p>Utilised = total utilised timesheet hours</p> <p>Non-Utilised = total non-utilised timesheet hours</p> <p>Leave = total hours on a time sheet where stage name is "Leave"</p>	<p>Utilisation %</p> <ul style="list-style-type: none"> Total of Utilisation of selection <p>Hours & Utilisation</p> <ul style="list-style-type: none"> Hours are broken down into: <ul style="list-style-type: none"> Utilised Non-Utilised Leave Will also show utilisation % (as line) Will display in Months or Weeks Bar chart / Line Chart <p>Utilisation %</p> <ul style="list-style-type: none"> Can be sliced to show: <ul style="list-style-type: none"> Office Team Team Member Can show: <ul style="list-style-type: none"> Per week Per month Data table 	<p>Data filters:</p> <ul style="list-style-type: none"> Office Team Reports To Rate Name <p>Active</p> <ul style="list-style-type: none"> All Yes No <p>Date controls</p>

Dashboard Name & Purpose	Key Data (Widgets)	Filters & Controls
<p>(People) Internal Time</p> <p>This dashboard will provide more context for non-utilised time and the breakdown of non-project time.</p>	<p>Internal Hours per Stage Name</p> <ul style="list-style-type: none"> • Y axis represents total hours, X axis represents months • Will display data summarised in a month • Will be broken up into the different Internal categories <p>Internal Hours by segment</p> <ul style="list-style-type: none"> • Y axis represents a definable segment, X axis represented total hours • Y axis segments include: <ul style="list-style-type: none"> - Office - Team - Rate Name - Staff Name - Stage Name - Task • Sorted by most hours at the top <p>Internal Hours data table</p> <ul style="list-style-type: none"> • Y axis represents a definable segment, X axis represents months • Y axis segments include: <ul style="list-style-type: none"> - Office - Team - Rate Name - Staff Name 	<p>Data filters:</p> <ul style="list-style-type: none"> • Office • Team • Reports To • Rate Name • Staff Name <p>Date controls</p>

Additional Improvements

We've added an enhancement to how your data is stored, so you might find you have more available space you can access from now on.

Fixes

- Fixed an issue where editing from the Invoice List wasn't working for some Project Managers.
- Fixed an issue where sometimes values in the Markup column for Transaction reports were only showing as \$0.
- Fixed a rare issue for customers integrating with Xero, where some foreign currency invoices weren't showing as paid because of the different conversion factors.
- Fixed an issue where selecting Clear Date from the WBS wasn't actually clearing the date.
- Fixed an issue where sometimes time captured in the Timesheet wasn't being rounded up to 15 minutes, when using the Round to 15 setting.

February 2023

Release Date: 19 February 2023

New Capability

Advanced Financial Data Importer

To better support our customers onboarding more efficiently, we've designed a new feature that will allow you to import more financial data, via our Excel Import tool.

This tool will support the importing of:

- Bills
- Invoices, Credit Notes, & Historical Transactions
- WIP transactions & expenses

The feature will be accessible as a premium onboarding service offering, with costs subject to total data being imported.

Edition Availability

Function	Professional	Business	Enterprise
Advanced Financial Data Importer	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Advanced Financial Data Importer					✓	✓

Some feature permissions can be customised via Synergy's Security Matrix for your organisation.

Additional Improvements

- We've made improvements to how you interact with transactions imported from 3rd party applications, so now you will be able to edit expenses and bills imported via the API.

Fixes

- Fixed an issue where PDF reports of the Internal Forecasted Weighted report was not accurately displaying the names of the months in the heading.
- Fixed an issue where using the keyboard to navigate the Search box displayed an error message.
- Fixed an issue where the Reply To email address was not always the Primary email of the staff member sending the email from Synergy.
- Fixed an issue where rounding foreign currency was causing paid Invoices synchronised with Xero to show as a owing.
- Fixed an issue where accessing the portal might redirect you back to your own Synergy profile instead.
- Fixed an issue where you might not have been able to download Transmittals from the Portal.

January 2023

Release Date: 15 January 2023

Fixes

- Fixed an issue where on rare occasions, some rare timesheet combinations created a duplicate timesheet.