Use Synergy More Effectively in your Business with our Tools, Manuals and Tips

Storing or Editing Documents in Synergy

You are trying to store or edit documents in Synergy using Internet Explorer Browsers. And you are having issues with these tasks.

Since Product Version 256 of Synergy Enterprise, it is important that "Compatibility View" is set for the Synergy Website.

To do this on each Resources desktop, click on the "Compatibility View Settings." Remove the Synergy Enterprise URL from the list. Also Uncheck the option "Display Intranet Sites in Compatibility View".
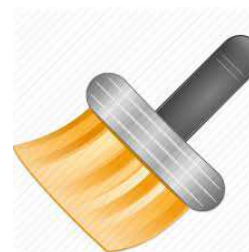
This should make it possible to save and edit documents. Remember that Synergy Enterprise is Multi-Browser, so you may always switch your browser of choice to Chrome.

Formatting Workflow Requests

This question was asked of me this week? When I am using Workflow Requests, the Fields seem to be in the middle of the screen, rather than left side. How can I change it back?

It seems like Exact made some code changes in the Workflow Request Page and now as a default many of the fields seem to go toward the middle of the screen like this example:

How do I make it look differently, with more of the fields further left, like in the following image:

Go to your workflow request definition for each of the fields and modify it:

Not quite out to the left edge but better, as in the second screen example.

Creating Calendar Requests in Synergy

To create a calendar request the following conditions must be met:

- You must have the Person field within the Request
- It has to have the field Start date within the Request
- It has to have the field End date within the Request
- In the Actions Tab of a workflow request definition, you must select (check) the field "Calendar" in the Planning Section
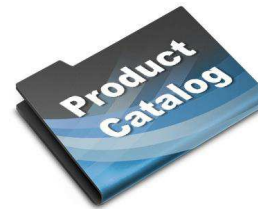
Export / Import Using the Templating Tool

Sometimes a System Administrator may wish to export a document type from an Exact Synergy database (such as a Test Synergy Environment) and import it again into another Exact Synergy database, such as your Live Database.

This can be done using the Synergy Templating Tool found in the Bin Directory.

1. Open your bin directory in your Synergy and double click on "TemplatingTool.exe"
2. Select your preferred language and click on "OK"
3. Make your choice that you want to 'Export' a Document Type. (You can use the same procedures to Export / Import other entities)
4. Click on the "Next" button
5. Enter the name of your SQL server
6. Select your current Exact Synergy database
7. Click on the "Next" button.
8. Name your Export file
9. Click on the '"Next" button. your export file will be placed in the bin directory of your Exact Synergy folder.
10. You can take the file (XML format) and use a similar process to now "Import" it into your other database.

Catalog of Synergy Tools & Price Sheet

This Catalog provides a summary by each tool of our tools, including its use and functionality. Download it here for our most recent catalog.

Pricing of our tools is scheduled to raise slightly in 2018, so if you are planning on ordering, do so before the end of the year. If you are interested in any of our tools, please contact us for a demo.

Catalog Download Here
Price Sheet Download Here

Cascading Prompts in a Workflow Request

Your Issue:
You would like to have a field in a request with a value that is selectable and dependent upon the value of a previous field.

Our Solution:
The GLM Browse Tool provides this functionality.

As an example of what can be done with this tool is:

A field can be used to select an Item Category. From this value, a browser for the next field will display only Items that are within that Product Assortment. This browser may be a standard

Synergy browser or you may create a custom browser. In Out-of-the-Box Synergy, there are probably 3,400 different browsers that have been created.

You may create a browser that will look at other SQL Databases, such as Macola / JobBOSS, MAX or others.

By changing the Item Category, and you will see a different list of options within the browser for the items that could be selected.

If you would like to see an example of this working, contact me for a demo.

SQL Query for Resources / Roles

Here is a SQL Query that you can use to review all of your Resources and determine which Roles and Levels that they have in Synergy:

```
select h.res_id As ID, h.fullname As Resource, d.description As Role,
case when r.rolelevel=1 then 'Corporate'
when r.rolelevel=2 then 'Group'
when r.rolelevel=3 then 'Division'
when r.rolelevel=4 then 'Cost Center Group'
else 'Cost Center' end as Level
from humres h
inner join hrroles r on r.empid=h.res_id
inner join HRRoleDefs d on d.id=r.roleID
where h.res_id in
(select empid from hrroles)
and h.blocked=0
and r.roleid=d.id
```

You can easily modify this statement to provide other information that is beneficial.

How can we do this in Synergy?

With a simple phone call, we can discuss your Synergy Topics and examine how a process may be improved through re-engineering or with one of the Tools that we promote.

This week I had an email from a Synergy Customer asking for a way to use Projects, but have unique Cards (and fields being displayed) based upon some field within the Project Card. Our developer has reviewed this request, and have decided that a tool can be created that would allow different types of request to have different looking cards.

Imagine a Project Card used for Marketing Purposes could look different than a Project Card for New Product Developments. And a System Administer can modify these cards themselves, without the need to do SQL Scripts. Let me know if this tool would be useful to your organization.

Reach out to me at dkloepfer@synergyexpert.com or call me on my mobile phone at 847-867-4401 for a discussion of your requirements.

Our Development Partner (GLM Systems) recently added three additional programmers to their staff. New Tools will be developed to assist the Synergy Enterprise Community in 2018 and beyond. If you have an idea for a new tool (solving one of your Synergy needs), let me know

and we will review it with you and can develop this tool for other Users worldwide..

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