

Getting Started with Reports and Gadgets

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Overview

The aim of this guide is to provide you with a general introduction to working with the new reports and gadget features in 12d Synergy v4.

Dashboard

Each job has a dashboard, which can display information that is relevant to your business or the specific job. You can customise it using simple editing controls, or use your own HTML editor for more advanced capabilities.

Dashboard Inheritance

You do not need to set up a dashboard for each job. Instead, you can set them up as a template or system basis and allow them to be inherited down.

There are two simple rules:

1. If the job was created from a template, it will use the dashboard for the job template
2. If the job was not created from a template, or there is no dashboard for the job template, it will use the system dashboard.

Editing Dashboards

At the Job Level

To edit a job dashboard, simply

- 1) Edit the job
- 2) Go to the Dashboard tab
- 3) Click edit

At the System Level

To edit the system wide dashboard, simply

- 1) Go to the 12d Synergy Administrator
- 2) Go to the Jobs selection
- 3) Go to the Dashboard tab
- 4) Select edit

Using Variables

You can embed variables within the dashboard to include information from the job you are. Use the variable tree on the right hand side to get the list of available variables. Note that these can be expanded to reach sub components of your job, such as Attributes.

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Variables	
Name	Type
Job	Job
ID	ID
Name	Text
CreatedDate	DateTime
CreatedBy	Contact
FirstName	Text
LastName	Text
Email	Text
Name	Text
Description	Text
Parent	Job
Job Type	Text
Job Number	Text
Job Name	Text
Job Status	Text
Job Address	Address
Client	Contact
Authority	Text
Job Created	DateTime
Bid Open Date	DateTime
Bid Close Date	DateTime
Bid Decision Date	DateTime
Project Value	Text
Proposal Stage	Text
Quote Number	System.I...
Job Contract Number	Text
Client Company	Company
CoverImage	Text

Simply pick what you want and double click to add it to the current position in the editor.

Dashboard Gadgets

Dashboard gadgets allow you to add additional information to your job dashboards. This includes information like summary information about your jobs, like

- Task status and progress
- File changes
- Recent check ins
- Workflow reporting

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and more.

The image displays five distinct dashboard gadgets:

- Job attributes:** A list of key-value pairs including 'Created by: Pre sender', 'Created on: Wednesday, 29 June 2016', 'Authority: Transport Main Roads', 'Client: The Client', 'Client Company: Shire of Livingstone Council', 'Job Address: 22 William St, Emu Park, Queensland, Australia', 'Job Contract Number: 20160630', 'Job Created: 28/06/2016 4:17:56 PM', 'Job Name: Emu Park', 'Job Number: 20160001', 'Job Status: Detail', and 'Job Type: Standard Job'.
- Task Progress:** A horizontal bar chart showing 40% completion.
- Task Status:** A stacked bar chart showing 14 items (56%) not started (red), 2 items (8%) in progress (yellow), and 9 items (36%) completed (green).
- File Changes Graph:** A line graph with a single data point at approximately 48 on the y-axis, labeled 'Changes'.
- Recent Check Ins:** A list of check-in events, including 'Pre sender checked in Jacaranda Company/Projects/20160001 - Emu Park/03 Engineering/Letters/Client-002.docx' and 'System update after attribute change' on 16-07-18 at 11:12.

Available Gadgets

Name	Description
12d Model Projects by Attribute	Group and display 12d Model projects by attribute values
Disk Space Usage	Shows the used and free disk space of a file store
File Changes Graph	Shows a graph of the number of changes of files in a job over time
File Charts	Displays information about the files in your job
Issued Files by Attribute	Displays information about issued files, grouped by attribute value
Issued Files by File Type	Displays information about issued files, grouped by file extension
Issues by Attribute	Displays information about issues by issue set attribute value
Issues by Contact or Company	Displays information about issued data, grouped by contact or company
Issues by Issue Set Type	Displays information about issued data, grouped by the issue set type

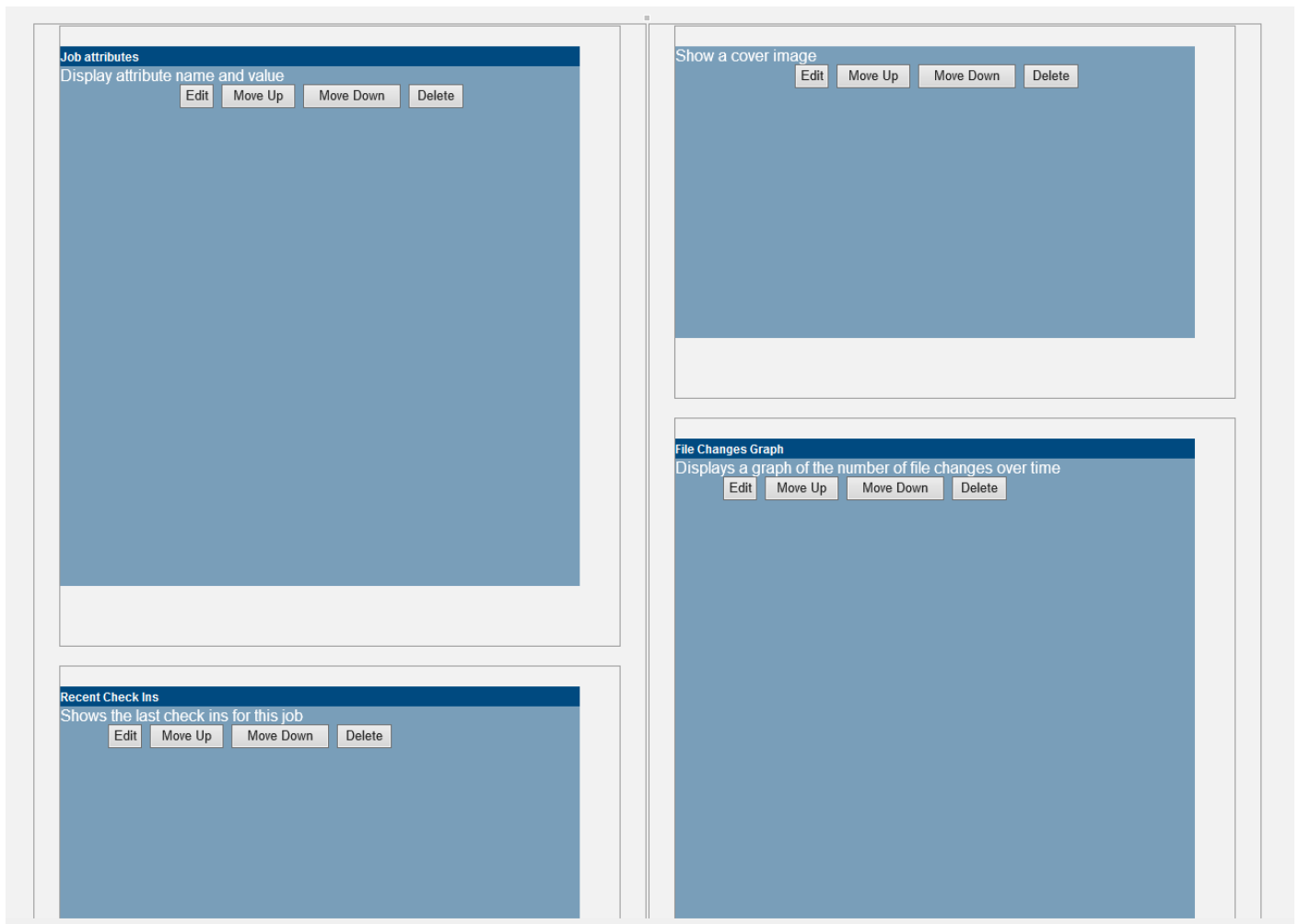
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Cover Image Box	Shows the job cover image
Job Attributes	Displays basic job information and attributes
Job info table	Shows info about the current job and sub jobs, including their attributes
Job info table – System wide	Shows the result of a job search query and their attributes
Jobs by Attribute	Shows attribute statistics for the current job and sub jobs
Jobs by Attribute – System wide	Shows attribute statistics for the results of a job search
Image Box	Shows a custom image
Recent Check Ins	Shows information about recent check ins
Task Charts	Displays information about tasks in the current job or sub jobs
Task Progress	Shows the progress of all tasks in the job, as a percentage
Task Status	Shows the status of all tasks in the job
Upcoming Tasks – All	Shows the list of upcoming tasks in the system
Upcoming Tasks	Shows the list of upcoming tasks in the current job
Current Workflow Table	Displays any current active workflows
File Workflows – Average Time In State	Shows the average time file based workflows have been in each state
Folder Workflows – Average Time In State	Shows the average time folder based workflows have been in each state
Job Workflows – Average Time In State	Shows the average time job based workflows have been in each state
Task Workflows – Average Time In State	Shows the average time task based workflows have been in each state
Workflow Status	Shows the number of items in each state for a workflow type

Editing Gadgets

Gadgets exist within gadget containers that consists of two columns of gadgets – the default dashboard within 12d Synergy ships with a container that looks like this:

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You may:

1. Move gadgets up and down within their columns
2. Edit existing gadgets to change their settings
3. Delete gadgets
4. Add new ones, using the “Add Gadgets” button at the bottom of the container

You can also add additional containers by clicking the “Gadget” button on the editor toolbar.

Reports

Types of Reports

There are several types of reports that can be generated – global reports or entity reports.

Global reports run across everything in the system, whereas Entity reports are generated for each item. For example,

Generating Reports

You can generate reports against many entities in the system, including:

- Jobs – via the Reports tab when a job is selected
- Folders – via the Reports tab when a folder is selected
- Files – via the Reports button on the file properties
- Users – via the Reports button on the user properties
- Tasks – via the Reports button on the task properties

Most reports may require additional input.

Additionally, reports are available via the Reports section in the 12d Synergy Administrator. These reports tend to be global and administrative, rather than about the status of a job etc.

Scheduling Reports

Scheduling a report requires administrative privileges on the entity you wish to report on, or if it's a global report, system administrator access.

To set a report for an individual entity, such as a job, simply

- 1) Edit the entity
- 2) Select Reports
- 3) Add a new schedule
- 4) Select the report you want to generate
- 5) Provide a name and time details – this can include
 - a. How often to run the report
 - b. The start date
 - c. An optional end date
 - d. The next execution / last execution time, if necessary
- 6) Check the Report Inputs tab to see if more inputs are required
- 7) Set the delivery method

Report Delivery Methods

There are several methods available for delivery.

1. Saving to a network path – this must be a UNC path, and not a mapped network drive. For example, [\\MyFileServer\drive_d\reports](#)
2. Save to a 12d Synergy Path
3. Send an email to
 - a. Groups

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- b. Contacts
- c. Roles (only available when sending a report for an entity that belongs to a job)