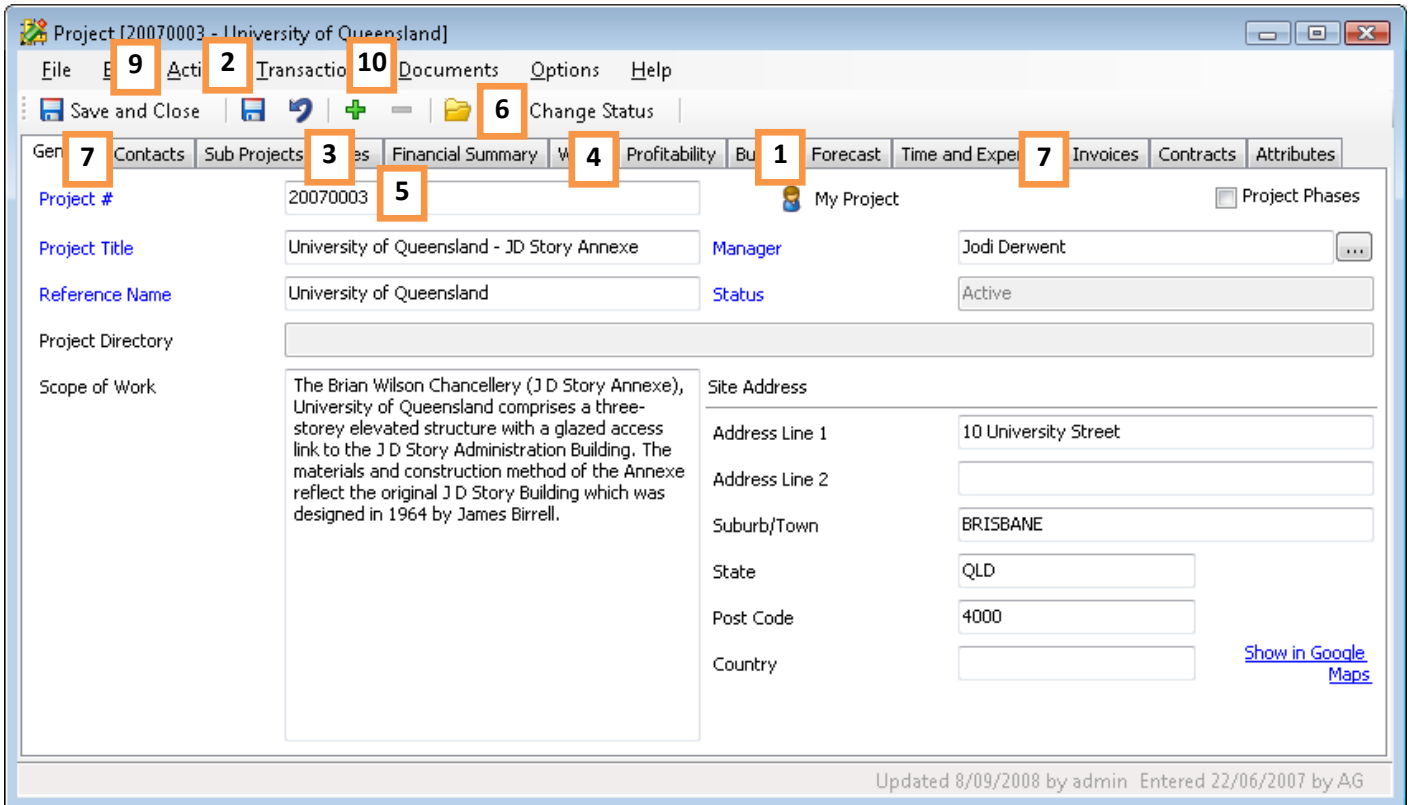





Synergy → Projects






The screenshot shows the 'Project [20070003 - University of Queensland]' window. The menu bar includes File, Edit, Action, Transaction, Documents, Options, and Help. The toolbar contains icons for Save and Close, Undo, Redo, Add, Subtract, and Change Status. The main window has tabs for General, Contacts, Sub Projects, Reserves, Financial Summary, WIP, Profitability, Budget, Forecast, Time and Expense, Invoices, Contracts, and Attributes. The 'Forecast' tab is active, showing project details like Project # (20070003), Project Title (University of Queensland - JD Story Annexe), Reference Name (University of Queensland), and Site Address (10 University Street, BRISBANE, QLD, 4000). Numbered callouts 1-10 point to specific UI elements: 1 (Forecast tab), 2 (Action menu), 3 (Sub Projects tab), 4 (WIP tab), 5 (Project # field), 6 (Change Status button), 7 (Invoices tab), 8 (Project Phases checkbox), 9 (File menu), and 10 (Transaction menu).



- 1 Forecast**  Project Forecast has been moved to a Tab on the main project view



 If a new month rolls over, and the forecasted value is not invoiced, it now appears in the residual column


 The order of sub projects in forecast now reflects the set sub project sort order



 [Projects :: Forecast](#)
- 2 WIP transfer**  Activity column has been added to the WIP transfer screen


 When doing a WIP transfer the "from" sub project defaults to the subproject in focus. There is a new button for selecting all transactions in the toolbar

 [Projects :: Transactions :: WIP transfer](#)
- 3 Sub projects**  When adding a sub project using the templates window, if a user changes the text of a sub project the item is auto selected


 [Projects :: Sub Projects ::](#) 


 All staff names now appear and can be assigned as Sub Project Managers

 Double clicking on a phase in the sub project list now opens the phase maintenance form
- 4 Actual vs budget**  New profitability tab used to summarise budget and actual costs on the same tab – security level permitting of course


 Fee Type column now included on the WIP and Profitability tab of a project

⑤ General


 The drop down control now shows the prefix description when the list is showing


 Added the blue mandatory fields when creating a new project

⑥ Status


 As part of the upgrade any WIP that is attached to a closed or unsuccessful sub project is Written Off, this issue was caused in an earlier version of the application


⑦ Project Contacts


 The role column when adding a contact to a project is now wider when the list is showing


 When attaching personnel to a project, the personnel names are now in alphabetical order

⑧ Invoicing


 The new invoice recipients postal address displays after changing the invoice recipient

 All invoicing views default to order by descending invoice date

 Invoice terms can now be set on an individual invoice and will be retained on future invoices


 When changing the "to" date range on a draft invoice by opening the calendar and clicked on the left arrow will no longer start a loop that locks the application

 When the invoice text is copied from a previous invoice it is now displayed when exported to the Word template

 The expense disbursement time no longer shows on the date bookmark when used in the fee table


 [Projects :: Invoices](#)


⑨ Attributes

 Changes to Project Attributes can now be written to the project audit log within Action

 [Projects :: Action :: Audit trail](#)


⑩ Document templates


 When creating a letter the default address is Post, but the default will swap to street if there is no postal address

 Attributes of type currency now display the cents when used on a document template

 [Projects :: Documents](#)

Approvals

 Improved the general performance when approving a large set of timesheet and expense transactions

 Approving multiple timesheet days and selecting "Next" as now takes you to the next day of transactions

 [My Synergy :: Approvals](#)