



# SYNERGY VISUAL WORKSHOP

## **SMARTVIEWS USER GRID VIEW BASIC**

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### **WORKSHOP TOPIC:**

SmartViews is an analytics tool designed to efficiently get you to your data, the way you want to see it. SmartViews User Grid View Basics will walk you through the basic User functions of field rearranging, hiding, sorting, grouping, and filtering – all within a sample Grid View.

### **WHY USE:**

How often are you reviewing information on printed reports, or exporting and manipulating the same data set in spreadsheets, sometimes to only to have it inaccurate the following day? SmartViews lets you take a data set, set it up the way you want to see it, and save that layout so that going forward you don't have to do any more manipulation and will finally have time to take action on what the information is telling you. Grid View Basics will get you familiar with the basic user functionality of the SmartViews product.

### **WORKSHOP DESCRIPTION:**

During this session, you will learn how to open a Grid View, setup the fields you want to see in the order you want to see them, and walk through all the options for sorting, grouping, and filtering the data. Finally you will learn how to save a layout so that you don't have any setup to do the next time you want to analyze the data set. Your instructor will spend up to 30 minutes reviewing the training material, which will be made available to you at the end of the session. The remaining time will be dedicated to hands on practice within the SmartViews product..

### **WHO SHOULD ATTEND:**

Any SmartViews End User.

### **LEARNING OBJECTIVES:**

Upon completion of this workshop attendees should be able to set up and save basic layouts in the Grid View of SmartViews.

### **WORKSHOP PREREQUISITE:**

This is a hands-on workshop. Attendees must have SmartViews installed, with a login and Security setup to be able to access Grid Views, including the Backlog View. Attendees should have working knowledge of the VISUAL ERP system.

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