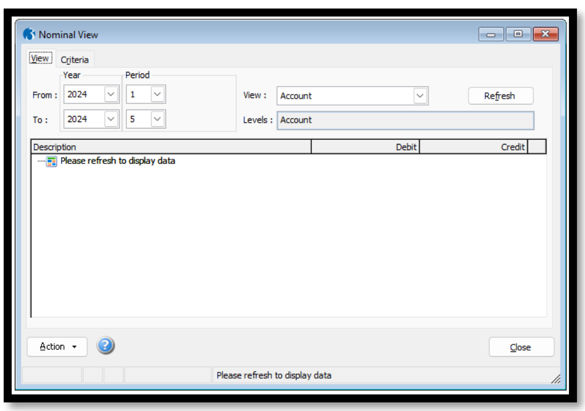
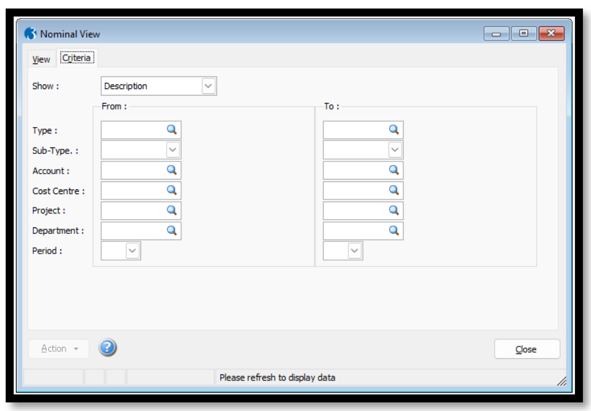
Nominal View

Use the View command to display enquiries based on the analysis dimensions used in the Nominal module. The views available depend on those defined using the Views command on the Maintenance submenu of the Nominal module. Two predefined views are provided. One for account balances only, one for balances by type, subtype and account. You can create your own dimension views using up to six levels of dimension. You can specify a period and year range for transactions to be selected that make up the analysis. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab. This tab offers range boxes for each of the dimensions and analysis information types available as well as a period range option. Once you have selected one of the view definitions in the View list box, you click Refresh to see account balances per dimension, starting at the highest level.

To see other levels, where applicable, you click the higher level in the tree, and you will see the names of dimensions at the next level down. For each level, you see summary account balances. You can drill down to see further detail. For example, you can display the transactions that make up a particular balance. You can also zoom a particular transaction to see the journal details.

Once you have generated a view, you can use the tab to display a 3Dbar graph. For each highest level of category in the view, the graph will show up to two columns for debit and credit values. Use the option buttons on the Graph tab to determine which columns are shown.





Action Button functions

Transactions

Drill down to display a list of the transactions that makeup the selected analysis total, or you can simply double-click the item in the view.

Use the printer icon on the toolbar to print the details, or in Opera 3 to save the details in Microsoft Excel.

History

Display details of the selected item as a breakdown of period balances and budget values and variances.

Use the printer icon on the toolbar to print the details, or in Opera 3 to save the details in Microsoft Excel.

Select Colour
Change the colour of the views by using the Select Colour command on the Action menu. You can then pick a standard colour or create a custom colour from the Colour form to use as the background colour for the tree view and any subsequent grid forms displayed using the drill down facilities.

If you want the colour you select to be retained next time you load the View form, you need to ensure the Remember form positions and sizes option is selected on the Preferences form in the System module.

Copy Data
Copy the view data to the Windows clipboard, for example, to place in a Microsoft Word or Microsoft Excel document.

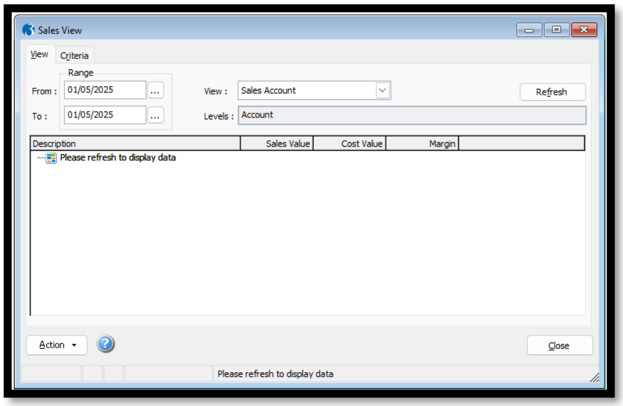
Graph
View the data in one or more charts. You can open the Graph form more than once so you can view the data using different graphical views, for example a pie chart and a horizontal bar chart. When the form is open you can move between records to change the information in the graph.
There are a number of options on the Action button on the Charts form:

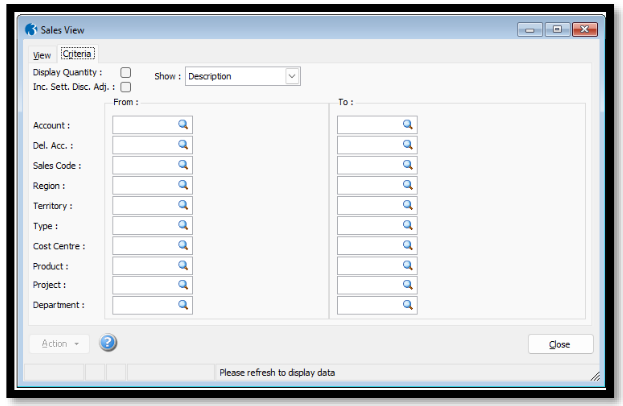
- Clipboard to copy the chart to the Windows clipboard
- Print with various printing settings
- Export to save the chart in a chosen graphical format
- Criteria to view the current criteria for the form.

Sales Ledger View
Use the View command to display enquiries based on the analysis facilities used in the Sales application. The views available depend on those defined using the Views command on the Maintenance submenu. Two predefined views are provided. One for account sales only, one for sales by analysis code and account. You can create your own dimension views using up to six levels of dimension. You can specify a date range for transactions to be selected that make up the analysis. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab. This tab offers range boxes for each of the analysis information types available as well as an option that enables you to choose whether you want to display the analysis quantity as well as value.

Once you have selected one of the view definitions in the View list box, you click Refresh to see sales per analysis classification, starting at the highest level. To see other levels, where applicable, you click the higher level in the tree, and you will see the names of the analysis classifications at the next level down. For each level, you see summary sales values. You can drill down to see further detail. For example, you can display the transactions that makeup a particular total. You can also zoom a particular transaction to see its details.

As in the Nominal ledger view you have various options on the Action button.



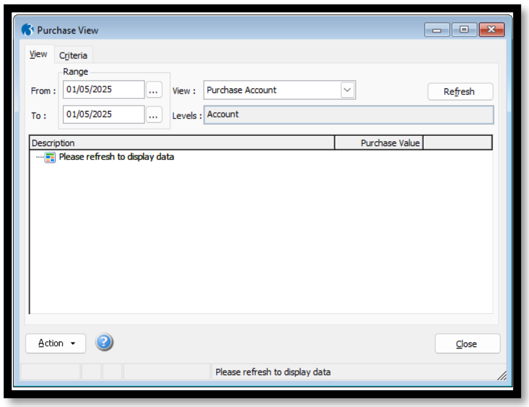


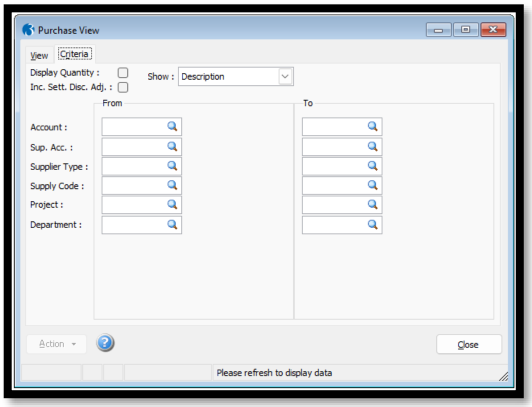
Purchase Ledger View

Use the View command to display enquiries based on the analysis facilities used in the Purchase module. The views available depend on those defined using the Views command on the Maintenance submenu. Two predefined views are provided. One for account purchases only, one for purchases analysis code and account. You can create your own dimension views using up to six levels of dimension. You can specify a date range for transactions to be selected that make up the analysis. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab. This tab offers range boxes for each of the analysis information types available as well as an option that enables you to choose whether you want to display the analysis quantity as well as value.

Once you have selected one of the view definitions in the View list box, you click Refresh to see purchases analysis classification, starting at the highest level. To see other levels, where applicable, you click the higher level in the tree, and you will see the names of the analysis classifications at the next level down. For each level, you see summary purchase values. You can drill down to see further detail. For example, you can display the transactions that make up a particular total. You can also zoom a particular transaction to see its details.

As in the Nominal ledger view you have various options on the Action button.



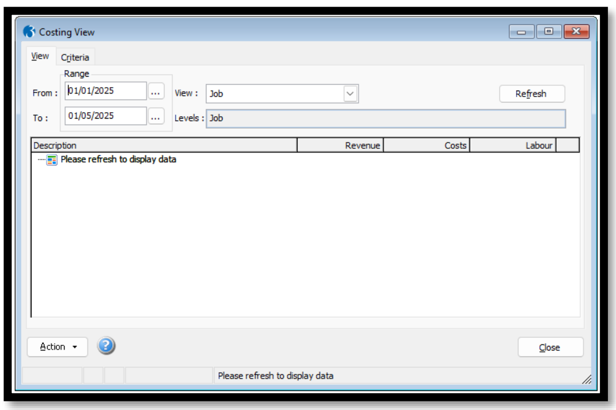


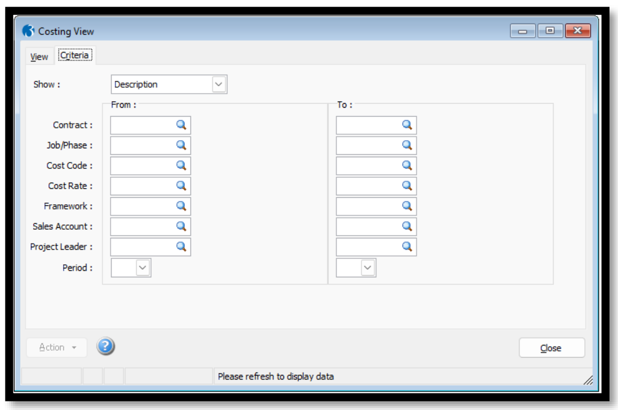
Costing View

Use the View command to display enquiries on Costing transactions. The views available depend on those defined using the Views command on the Maintenance submenu. Two predefined views are provided, one for Jobs only, the other for Jobs and associated phases. You can create your own views using up to six levels of dimension. You can specify a date range for transactions to be selected that make up the view. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab. This tab contains range boxes for each of the information types available.

Once you have selected one of the view definitions in the View list box, click Refresh to see the Costing information, starting at the highest level. To see other levels, where applicable, click the higher level in the tree to display the names of the analysis classifications at the next level down. For each level, summary revenue, cost, and labour values are displayed. You can drill down to see further detail. For example, you can display the transactions that make up a particular total. You can also drill down on a transaction to see its details. Once you have generated a view, you can use the Graph tab to display a 3D bar graph. For each highest level of category in the view, the graph displays up to three columns for Revenue, Costs, and Labour. Use the option buttons on the Graph tab to determine which columns are displayed.

As in the Nominal ledger view you have various options on the Action button.





Stock View

Use the View command to display enquiries of stock item transactions. The views available depend on those defined using the Views command on the Maintenance submenu. Two predefined views are provided. One for stock item issues listed by stock reference; the other for stock item within category. You can create your own views using up to six levels of analysis dimension. You can specify a date range for transactions to be selected that makeup the analysis. If you want to specify further selection criteria, you can use the filters provided on the Criteria tab. This tab offers range boxes for each of the analysis information types available as well as options that enable you to choose which transaction types are included in the results.

Once you have selected one of the view definitions in the View list box, you click Refresh to see the stock item transactions. To see other levels, where applicable, you click the higher level in the tree, and you will see the names of the analysis classifications at the next level down. For each level, you see summary stock movement quantities and values. You can drill down to see further detail. For example, you can display the transactions that make up a particular total. You can also zoom a particular transaction to see its details.

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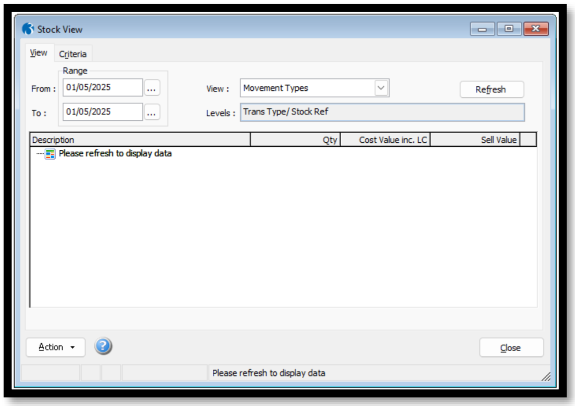
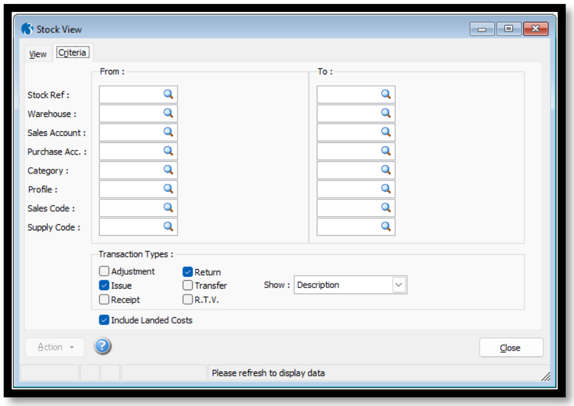
Once you have generated a view, you can use the Graph tab to display a 3D bar graph. For each highest level of category in the view, the graph will show up to three columns for selling value, cost value and quantity. Use the option buttons on the Graph tab to determine which columns are shown.

As in the Nominal ledger view you have various options on the Action button. You also have the criteria tab in the Stock View. The Criteria tab is where you filter the transactions that are included on the view by entering the From and To ranges for each type of record. For example, if you want to see only certain stock items in one warehouse, you can enter the stock item range in the Stock Ref. boxes and the same warehouse in both Warehouse boxes.

Transaction Types - Type of transaction posted for the stock item throughout Opera.
Show - Choose to include just the stock item's code or description, or both the code and the description.
Include Landed Costs - Landed costs can be included if the landed Cost option on the System- Maintenance - Company Profiles form is selected.
This is ticked automatically if the Landed Costs feature is used. The landed cost value is included together with the unit cost value in the Cost Value incl. LC column.





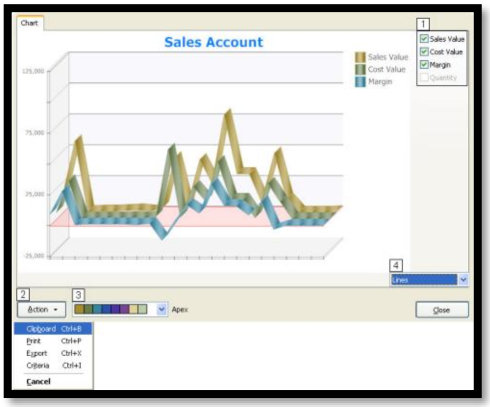
Opera 3 Chart Views

Pegasus Opera 3 includes powerful and versatile chart views throughout the application so you can view your company data in a graphical format. Charts can be copied to the Windows Clipboard, saved as a graphical file on your computer, or printed. You can choose the colours used in a chart from colour themes when you view a chart.

You can view as many charts as you need at the same time. So, if you want to compare different codes of information, like supplier accounts, you can open as many chart forms as you need. For example, if you wanted to compare the turnover of customer account ADA0001 and customer account YOU0001, you could do this by positioning a chart for the first account next to a chart for the other account. You can also view the same information in different types of charts at the same time. For example, you can view a customer's turnover in both a vertical bar chart and a horizontal bar chart.

Some charts will not display negative values. Other charts, like the Pie Chart and Doughnut Chart, only display one category of information. If the view you are using includes either negative values or more than one category of information, a message is displayed when you select type of chart that cannot display the information.

This is a line graph which is accessed from the View form in the Sales Ledger.



1 - Tick boxes
Some charts allow you to select the categories of informationyou want to include on the chart. In the multi-category chartabove for example, you can choose to include the value of sales,the cost of those sales and the sales margin. Other charts aresingle-category charts so include one set of values only.

2 - Action button
These commands are available:

- Clipboard to copy the chart to the Windows clipboard
- Print with various printing settings
- Export to save the chart as a bitmap graph
- Criteria to view the current criteria for the form.

3 - Colour Scheme
You can choose the colours you want to see in the chart by selecting a colour scheme. The application uses the first colour in the chosen scheme to display the first series or category of information, the second colour for the second category of information, and so on. The colours are used until you close the chart form.

4 - Chart Types
Each view can be drawn using different chart styles. The styles that are available depends on the selected chart. Click here for a description of each type of chart available.

Chart views are available in the System Manager, Sales Ledger, Sales Pipeline Management, Purchase Ledger, Nominal Ledger, Costing, Stock and Payroll modules. Each chart's scale either displays values (as in a Line chart) or percentages (as in a Full-Stacked Bar chart). This table describes all the charts that are used in the different views in the application. Only some of the chart types are available to each chart.

Where the Opera 3 Charts are available.
The charts in Opera 3 are available throughout the application. Below describes the areas where charts are available, the information that is included in each chart and also the types of charts that can be used. Pie charts and Doughnut charts can be selected in the areas mentioned in the table below only if one category of data is selected.

System Manager > Utilities > Monitor Companies
Displays the sales turnover and purchase turnover for the company from the beginning of the calendar year.
Available Charts - Points, Lines, Area, Vertical Bars, Horizontal Bars.

Sales Ledger > View
Displays customer enquiries based on the analysis facilities used in the Sales Ledger. You can include a range of customers in this view.
Available Charts - Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.

Sales Ledger > Processing > Turnover
Displays a twelve-month analysis of turnover for the selected customer.
Available Charts – Points, Lines, Area, Vertical Bars, Horizontal Bars.

Purchase Ledger > View
Displays enquiries based on the analysis facilities used in the Purchase Ledger. You can include a range of suppliers in this view.
Available Charts – Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.

Purchase Ledger > Processing > Turnover
Displays a twelve-month analysis of turnover for the selected supplier.
Available Charts – Points, Lines, Area, Vertical Bars, Horizontal Bars.

Nominal Ledger > View
Display enquiries based on the account, cost centre, type, sub type dimensions used in the Nominal Ledger. If the Advanced Nominal Ledger is used, views can also include additional dimensions as well, like projects and departments.
Available Charts – Vertical Bars, Horizontal Bars.

Costing > View
Displays enquiries on costs and revenue transactions posted in the Costing module and other modules that update Costing with job costs and revenue.
Available Charts – Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.

Stock > View
Displays enquiries of receipts, issues, returns, allocations, deallocations, adjustments, transfers, purchase orders and Sales Order transactions that affect stock.
Available Charts – Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.

Payroll > View
Displays enquiries on payroll transactions.
Available Charts – Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.

Sales Pipeline Management > Opportunities > View
Displays enquiries of your sales opportunities.
Available Charts – Full-Stacked Bars, Points, Lines, Area, Stacked Bars, Stacked Area, Horizontal Multiple Bars, Horizontal Stacked Bars, Horizontal Full-Stacked Bars, Pie, Doughnut.