

## Access & Experience

### Browser-Based Access

- Use Synoptix entirely in the browser—no desktop installs, no version mismatch, no IT push.

### Single, Central URL

- Users just bookmark a URL and log in; IT controls access behind the scenes.

### Customizable Tile Launchpad

- Clickable tiles take each user straight to key dashboards, reports, or worksheets they care about most.

### Favorites & Recents Panel

- Users see their favorite reports and most recent activity immediately, instead of hunting through folders.

### Flexible Layout & Navigation

- Resize or collapse side menus to focus on what matters—reports, dashboards, or setup.

## Budgeting, Forecasting & Planning

### Advanced Budgeting Module

- Create detailed budgets with structured workflows, department contributions, and multiple versions (approved, forecast, best/worst case).

### Departmental Expense Worksheets

- Give each department head a tailored worksheet to update just their portion of the budget.

### People Planning & Salary Allocation

- Model salaries, benefits, and allocations across multiple departments or cost centers from one place.

### Revenue Planning (Tuition & Beyond)

- Plan tuition plus other revenue streams like meals, grants, and endowments in one system.

### What-If Scenario Modeling

- Adjust key drivers—like enrollment or staffing levels—and instantly see impact on revenue and expenses.

### Multi-Version Budgeting

- Keep separate versions (approved budgets, Q1–Q4 forecasts, best/worst case) and report on any of them.



## Reporting & Analysis

### Self-Service Report Creation

Build brand-new reports directly in the web, using an interface that feels like a spreadsheet.

### Edit Existing Reports on the Web

Update or tweak current reports without going back to a desktop designer or calling IT.

### Multi-Level Drill-Down

Click a number to see the accounts behind it, then click again for line-level detail, then GL transactions.

### Audit-Level Detail View

Run an "audit report" that shows every single account (including zeros) that makes up a report for reconciliation or auditors.

### Template-Based Reporting

Use one report template and run it for different funds, departments, managers, or campuses with filters.

### Interactive Dashboards & KPIs

Visualize key metrics with charts and gauges you can rearrange, adjust, and drill into.

### Pre-Built Filters (Chart of Accounts)

Filter reports by fund, department, cost center, or other segments instantly, without rebuilding anything.

## Collaboration & Communication

### Cell-Level Conversations (Collab)

Attach a conversation directly to a specific number in a report, with due dates and context.

### Email Notifications with Context

When someone is tagged in a conversation, they get an email with the details and link back to the report.

### Attach Supporting Files

Upload PDFs, spreadsheets, or other supporting docs directly into a conversation tied to a specific value.

### Historic Context by Report

Conversations are tied to the report's run date, so you can look back next year and remember why numbers looked odd.



## Automation & Delivery

### Built-In Scheduler

Schedule any report, dashboard, or packet to run automatically on your chosen cadence.

### Flexible Frequency Options

Set schedules to run once, daily, weekly on specific days, monthly, or quarterly—whatever matches the business rhythm.

### Multi-Format Delivery

Each scheduled report can be delivered as a PDF, Excel file, and an HTML link back into Synoptix.

### Early-Morning Delivery

Common higher-ed pattern: schedule reports for early morning so they're in inboxes when users log in.

## Design & Flexibility

### Familiar Spreadsheet-Like Designer

Rows, columns, formulas, and formatting work much like Excel—just focused on financial statements.

### Unified Accounting Cell

Define which accounts belong in each line once; reuse across actuals, budgets, and forecasts.

### Highly Customizable Dashboards & Tiles

Link tiles to any report, dashboard, worksheet, or view—tailored for Higher Ed or Manufacturing audiences.

### Dynamic Columns & Layout Tools

Easily switch between actuals, budgets, year-to-date, variances, and percentages without rebuilding the report.

### Lookup Tools for Labels & Structure

Pull account descriptions, labels, or hierarchies straight into reports without manual retyping.



# Security & Governance

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## Role-Based Permissions

Control who can run, modify, or drill down into each report.

## Department-Level Data

Use filters to ensure users only see the departments or funds they're allowed to view.

## Multi-Factor Authentication

Optionally require a one-time code emailed to the user for extra login security.

## Single Sign-On Alignment

Supports directory-based login (like LDAP/Active Directory), with more modern SSO options under development.