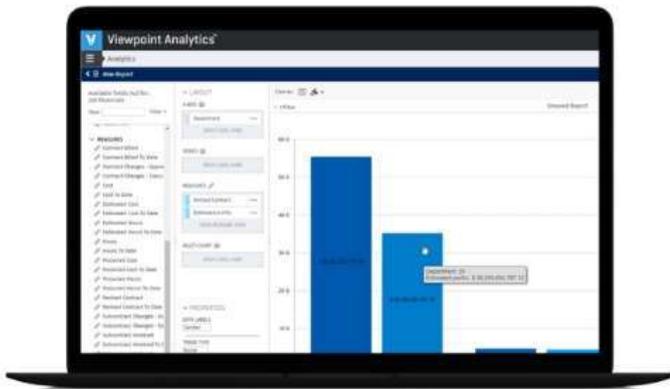


Ready, Set, Report: Getting Started in Viewpoint Analytics is Easier than You Think!



Viewpoint Analytics makes visualizing and understanding data easy for anyone in your construction organization.

As a contractor, you know that getting your hands on accurate financial and project data can be a significant challenge. Often, you have to build complex crystal or SQL reporting which requires expert level resources to assemble. And typically the people who can help you assemble the data aren't the ones who can tell you what the data even means for your business.

Enter Viewpoint Analytics, where we've made accessing data and creating detailed reports and visuals a much easier process – for anyone within your organization. From project managers to the executive team, Viewpoint Analytics lets you self-serve what data you want to see and how you want to see it — all in a few simple clicks.

Viewpoint Analytics helps you access all of your data in a single location, where you can analyze and report it with actionable and accurate results to enhance your strategic business decision-making. If you are a ViewpointOne customer you can access Viewpoint Analytics through the same menu that you use to get to Team Project Management. And, getting started is a lot easier than you might think!

Determine Your Roles



User permissions are easily determined by their user roles in Viewpoint Analytics.

As with many applications in ViewpointOne, what you can see and what you can do is determined by your assigned role and the permissions associated with that role.

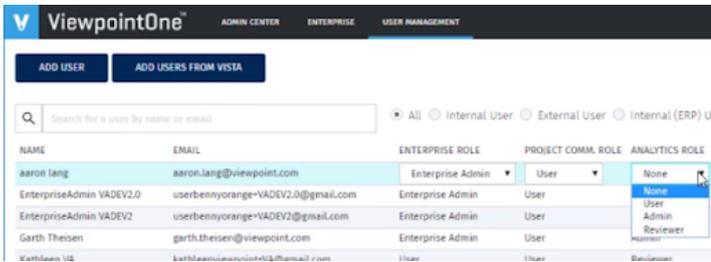
These Viewpoint Analytics roles and permissions are assigned by your *Enterprise Administrator*. The three Roles or “levels” that can be assigned within Viewpoint Analytics are:

- Administrator
- User
- Reviewer

Someone with an administrator role, also called an “admin,” can see all available data and reports, create reports and post reports to a public folder for others to use — that is the only role that can do so. A user in Viewpoint Analytics can view and edit existing reports, create reports from data to which they have access, and save those reports to their own *My Reports* folder. A reviewer in Viewpoint Analytics can only view reports, but not edit or create them.

Inviting people to Viewpoint Analytics and setting roles is simple and straightforward in ViewpointOne. If you’re an *Enterprise Administrator*, you’ve likely created similar invitations for other applications, like Viewpoint Team.

Steps for Existing ViewpointOne Users who Use Viewpoint Team



Easily assign Viewpoint Analytics roles during the setup process.

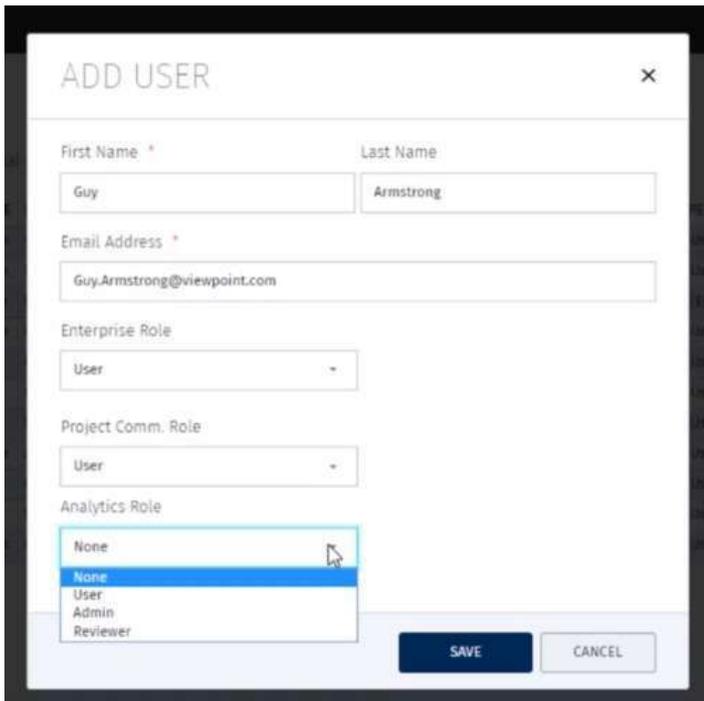
If the user is already a ViewpointOne user, it is a simple matter of adding their access to Viewpoint Analytics:

- First, log in to ViewpointOne;
- Click on your name in the upper right corner and select *Admin Center*. If you don't see *Admin Center*, you have not been designated as an administrator;
- If you have more than one enterprise, select it from the *Admin Center* list;
- The selected *Enterprise* tab appears;
- Click the *User Management* tab;
- Click *Add User*;
- Select the check box for each user you want to add.
- Click on the *Edit* link in the far right column;
- Go to the *Viewpoint Analytics Role* assignment field, click the dropdown and select the user's Viewpoint Analytics role — either user, admin, or reviewer;
- Then assign a *Business Unit* from the drop-down in the next column. You can select multiple business units here. The *Business Unit* selection will dictate the data you can access and view in the reports. This is important because if no data source is selected, no data will appear in the report interface;
- When you have made your selections, click *Save*.

You'll see a list of all of your ViewpointOne users. If you have many users, you can enter the user's name in the search field to quickly find a specific user. After finding the user you want to add to Viewpoint Analytics:

The existing user now has access to Viewpoint Analytics in the designated role, with access to multiple business units.

Steps for Users Not Yet Set Up in Viewpoint Team



Adding a new user is simple in Viewpoint Analytics.

If the user you want to add is not already a ViewpointOne user, you'll have to enter additional information to complete the invitation:

- First, log in to ViewpointOne;
- Click on your name in the upper right corner and select *Admin Center*. If you don't see *Admin Center*, you have not been designated as an enterprise admin;
- The selected *Enterprise* tab appears;
- Click the *User Management* tab;
- Click *Add User*;
- The *Add User* window will open;

- Enter the name and email address of the user in the corresponding fields. Accuracy is very important here — all communications depend on this information;
- From the *Enterprise Role* drop-down menu, select the access level for this user. This selection determines whether a user is an enterprise admin. If not, select *User*;
- From the *Project Comm. Role* drop-down, select the access level for the user. This selection determines what the user can see and do in Viewpoint Team. Select either user, reviewer, or admin;
- In the *Analytics Role* field, select the level of access you want to give the user to Viewpoint Analytics. Select either user, reviewer, or admin;
- Click *Save*. The user will automatically receive an e-mail invitation with a link to complete their Viewpoint Analytics account;
- Finally, back on the *User Management* page, you'll need to link the new user to a *Business Unit*. You can select multiple business units here. The business unit selection will dictate the data you can access and view in the reports. Find your new user's line and click on the *Edit* link in the far right column;
- From the *BU Data Access* drop-down, select an appropriate business unit. Again, this is important because if no business unit is selected there will be no data to create reports;
- Then click *Save*.

Now you know how to invite new users to Viewpoint Analytics. You're on your way to making better decisions based on the latest information and most insightful analysis of your business data. Happy reporting!

Interested in learning more about Viewpoint Analytics can help make you a more data-driven contractor? [Contact us today](#) for your own, personal demonstration.

Posted By

[Daniel Griffith](#)

Daniel is a member of the product team at Viewpoint, working to help position and speak market realities of Viewpoint's product's across the Office, Team and Field.