



BI WebPortal 2021


Builder Incubator
BI WebPortal 2021 What's New

Dec-2020

Release: BIWebPortal 2021a

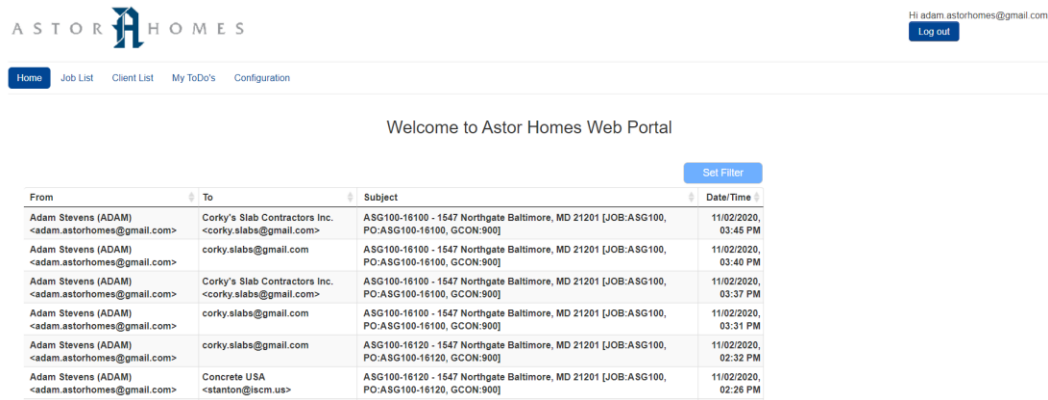
Version: 2021.01.2012.011

Package: 1.1.393

EMAIL on the Home Page

Software Report: WEBP-307a

We have added an EMAIL editor to each user's home page, so when they log in, they can see all their sent/received emails.



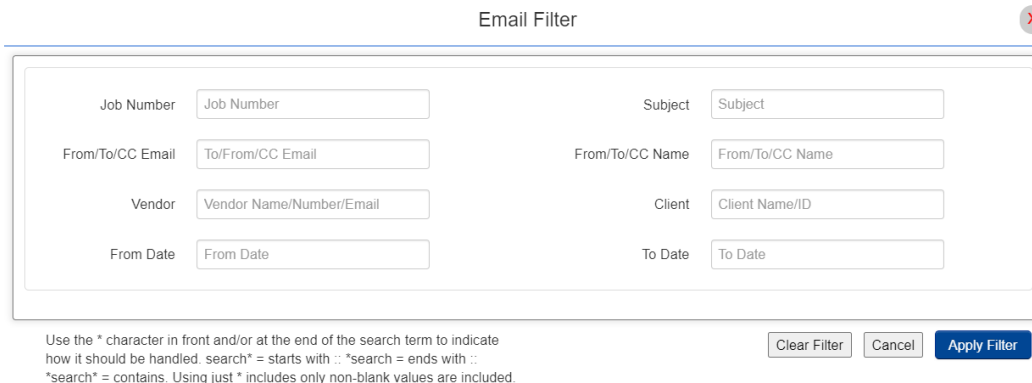
The screenshot shows the Astor Homes Web Portal interface. At the top, there is a navigation bar with links for Home, Job List, Client List, My ToDo's, and Configuration. A "Log out" button is visible in the top right corner. The main content area displays a "Welcome to Astor Homes Web Portal" message and a "Set Filter" button. Below this is a table of emails with columns for From, To, Subject, and Date/Time.

From	To	Subject	Date/Time
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	Corky's Slab Contractors Inc. <corky.slabs@gmail.com>	ASG100-16100 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16100, GCON:900]	11/02/2020, 03:45 PM
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	corky.slabs@gmail.com	ASG100-16100 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16100, GCON:900]	11/02/2020, 03:40 PM
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	Corky's Slab Contractors Inc. <corky.slabs@gmail.com>	ASG100-16100 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16100, GCON:900]	11/02/2020, 03:37 PM
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	corky.slabs@gmail.com	ASG100-16100 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16100, GCON:900]	11/02/2020, 03:31 PM
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	corky.slabs@gmail.com	ASG100-16120 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16120, GCON:900]	11/02/2020, 02:32 PM
Adam Stevens (ADAM) <adam.astorhomes@gmail.com>	Concrete USA <stanton@iscm.us>	ASG100-16120 - 1547 Northgate Baltimore, MD 21201 [JOB:ASG100, PO:ASG100-16120, GCON:900]	11/02/2020, 02:26 PM

EMAIL FILTER on the Home Page

Software Report: WEBP-307b

A user can filter their EMAILS based on the following field selections
Notice the asterisk * wildcard can be used



The screenshot shows an "Email Filter" dialog box with a close button (X) in the top right corner. The dialog contains several input fields for filtering emails:

- Job Number: Job Number
- Subject: Subject
- From/To/CC Email: To/From/CC Email
- From/To/CC Name: From/To/CC Name
- Vendor: Vendor Name/Number/Email
- Client: Client Name/ID
- From Date: From Date
- To Date: To Date

Below the input fields, there is a legend explaining the use of the asterisk (*) character:

Use the * character in front and/or at the end of the search term to indicate how it should be handled. search* = starts with :: *search = ends with :: *search* = contains. Using just * includes only non-blank values are included.

At the bottom right of the dialog, there are three buttons: "Clear Filter", "Cancel", and "Apply Filter".


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EMAIL FILTER on the Home Page – ADMIN User

Software Report: WEBP-307c

The EMAIL system in the WebPortal is more powerful than the typical email, because ADMIN users can also review ALL emails SENT/RECEIVED for ALL other employees and vendors.

By selecting the SHOW ALL EMAILS an Admin User can (for example) select a specific JOB and then see ALL emails to/from ALL employees and vendors that have that job number tagged into the email. Note that JOB TAGS are automatically assigned, when emails are created or responded to in the portal.

Email Filter ✕

Show All Emails

Job Number <input type="text" value="Job Number"/>	Subject <input type="text" value="Subject"/>
From/To/CC Email <input type="text" value="To/From/CC Email"/>	From/To/CC Name <input type="text" value="From/To/CC Name"/>
Vendor <input type="text" value="Vendor Name/Number/Email"/>	Client <input type="text" value="Client Name/ID"/>
From Date <input type="text" value="From Date"/>	To Date <input type="text" value="To Date"/>

Use the * character in front and/or at the end of the search term to indicate how it should be handled. search* = starts with :: *search = ends with :: *search* = contains. Using just * includes only non-blank values are included.

Properly handle To-Do's for "X" Clients

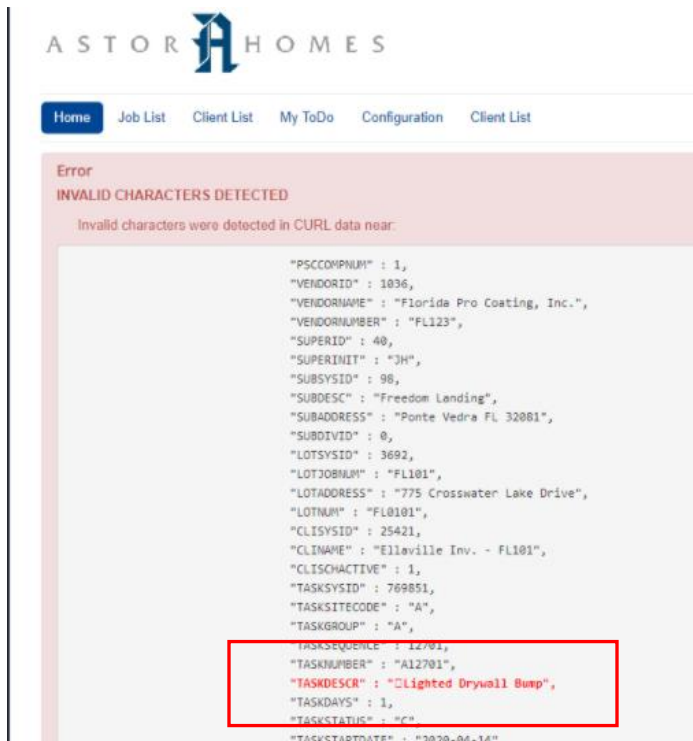
Software Report: WEBP-297

Clients with a status of I, X, U1, U2 and U3 are by design not presented in the portal. This software change handles a My ToDo when it is displayed for the logged in user and the Client is not available in the portal.

Error Report – Invalid Character

Software Report: WEBP-314

We added an error report in the WebPortal related to special (invalid) characters. If an invalid character is entered into PSClient or Gemini that results in an error in the portal, the error message will identify the CLIENT and the FIELD containing the invalid character.



Bug Fix – Vendor Name not visible for Office and Office ADMIN

Software Report: WEBP-304

The PO/TASK list and the PO/TASK Detail page were not showing the vendor for the PO, when logged in as an OFFICE or OFFICE-ADMIN type user. This has been corrected.

Bug Fix – PO Refresh would fail

Software Report: WEBP-303

Changed the code in the Portal and BIWS so that if a PO SYS ID is not assigned, it would then fetch the specific PO based on Job Number, Vendor and PayCode.

Blank Lines removed from ToDo text area

Software Report: WEBP-295 / 296 / 297

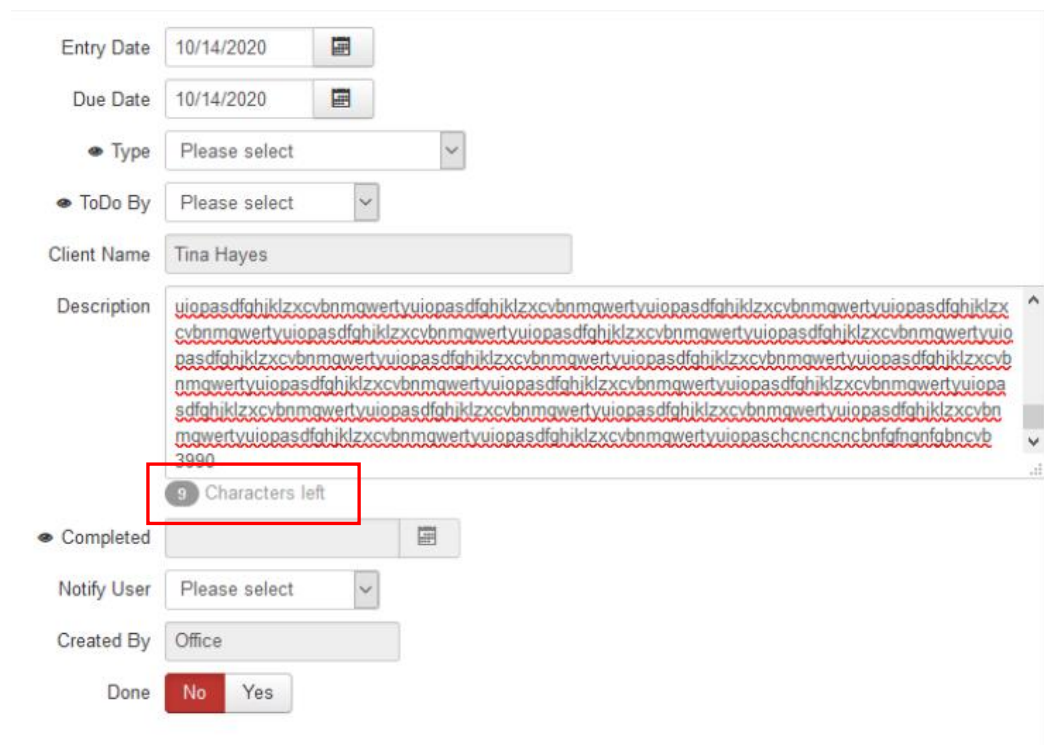
Blank Lines are displayed differently in HTML (portal) as compared to in PSClient. Some users have added numerous leading blank lines in their ToDo description fields. This enhancement will properly handle how these lines are presented.

ToDo Description text size limitations

Software Report: WEBP-294

In PSClient the ToDo description has a set limitation of the number of characters (4000). There was no limit set in the portal text field, therefore a user could add a long description in the portal and some of that detail would get truncated when it updates to the portal.

To prevent the loss of this text data we added a text counter in the portal.



The screenshot shows a web portal form with several fields: Entry Date (10/14/2020), Due Date (10/14/2020), Type (Please select), ToDo By (Please select), Client Name (Tina Hayes), and Description. The Description field contains a long string of placeholder text. A red box highlights a text counter below the description field that reads "9 Characters left". Other fields include Completed (checkbox), Notify User (Please select), Created By (Office), and Done (No/Yes buttons).