BI WebPortal 2020

BI WebPortal 2020 What's New

Mar-2020

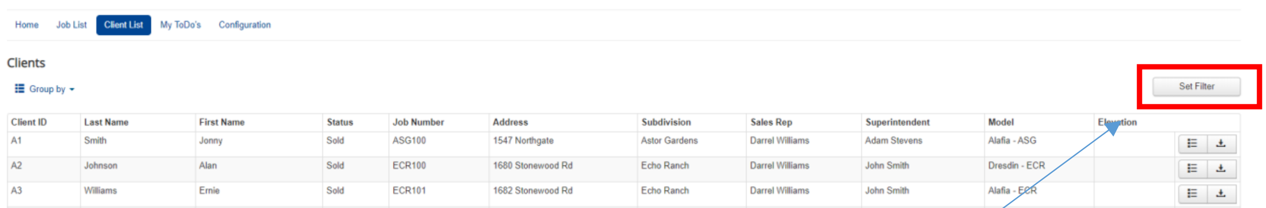
Release: BIWebPortal 2020a

Version: 2020.01-1.1.295

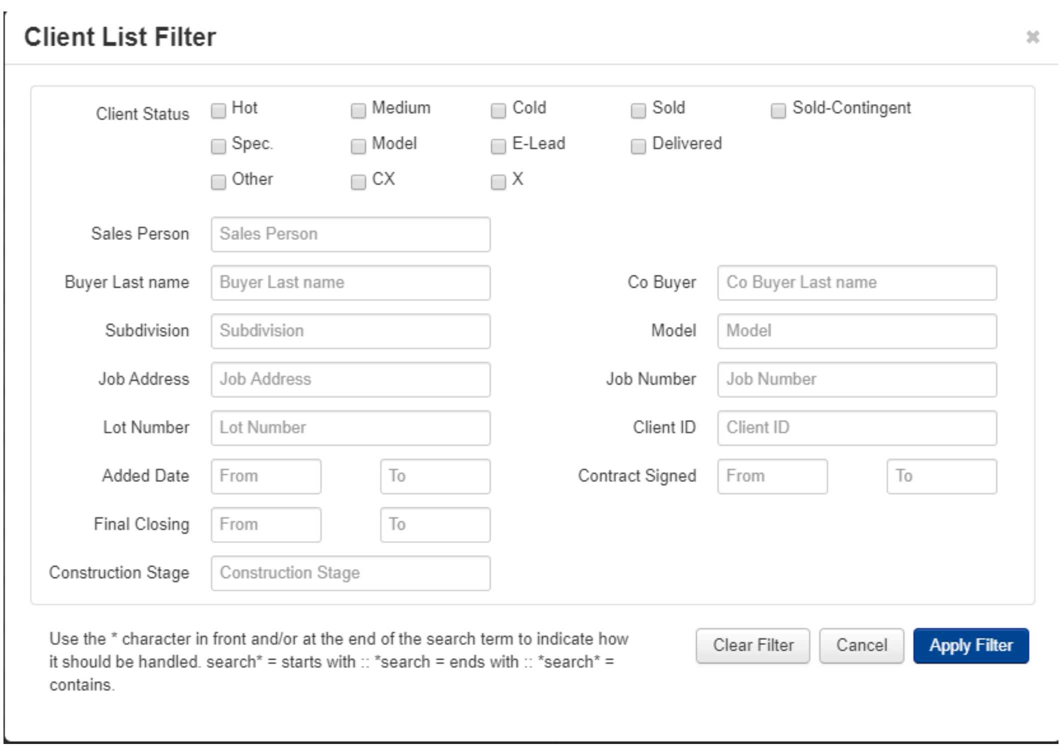
<u>An Overview of the Client List in the WebPortal</u>

Software Report: WEBP-Several

The CLIENTS from PSClient are displayed in the WebPortal using the CLIENT LIST menu option. Any changes made in PSClient are automatically updated directly to the WebPortal and of course any changes made in the WebPortal are automatically updated to PSClient – no SYNCing step is required.

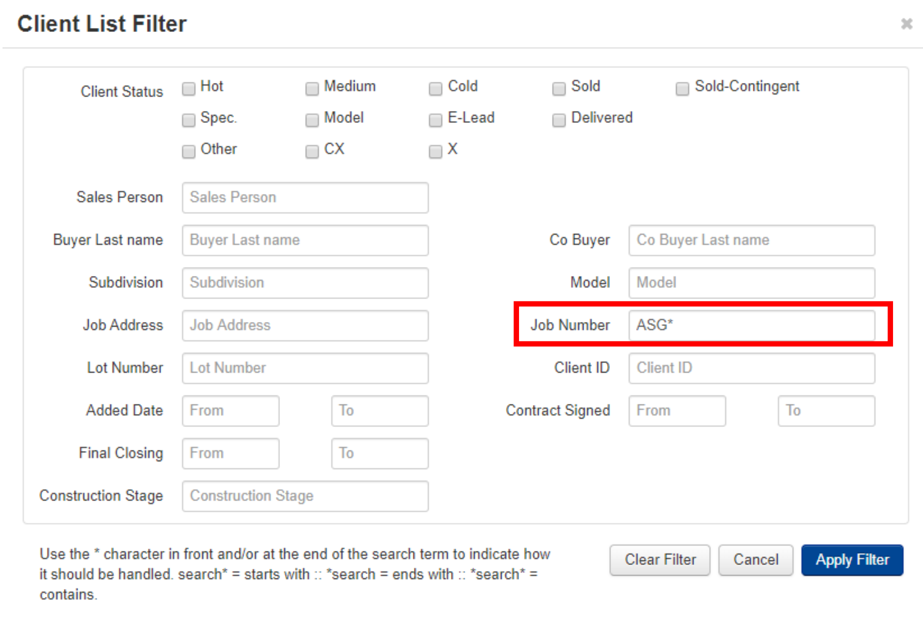


The Client List can be FILTERED by the filter menu located on the far right.



<u>Client List FILTER</u>
Software Report: WEBP-Several

User can filter the client list using several methods, including wild cards. Notice below I filtered the Job Number with ASG* (where * is a wild card).



This results in the Client List being filtered to display only job numbers beginning with ASG

Client ID	Last Name	First Name	Status	Job Number	Address	Subdivision	Sales Rep	Superintendent	Model	Elevation
A1	Smith	Jonny	Sold	ASG100	1547 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	
A7	Foster	Eddie	Sold	ASG101	1549 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	
A8	Morgan	Leah	Sold	ASG102	1551 Northgate	Astor Gardens	Bob Richards			
A9	Rivera	Dario	Sold	ASG103	1553 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	
A10	Roberts	Clint	Sold	ASG104	1555 Northgate	Astor Gardens	Bob Richards			
A11	Campbell	Glenn	Sold	ASG105	1557 Northgate	Astor Gardens	Bob Richards	Adam Stevens		
A14	Huges	Mike	Sold	ASG107	1561 Northgate	Astor Gardens	Bob Richards	Adam Stevens		
A25	Taylor	Bill	Sold	ASG113	1573 Northgate	Astor Gardens	Mike Tifton	Adam Stevens		

Here is how the WILDCARD filtering works

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.

Client List Columns

Software Report: WEBP-Several

The CLIENT LIST contains fields that can be turned ON or OFF – this will determine which COLUMNS are displayed when viewing the Client List from the WebPortal.

Builder List Configuration for Office

Client List   Client ToDo List

Client List

- [x] Client ID
- [x] Last Name
- [x] First Name
- [ ] Phone 1
- [ ] Phone 2
- [ ] Phone 3
- [ ] Fax
- [ ] CO First Name
- [ ] CO Last Name
- [x] Status
- [ ] CO Phone 1
- [ ] CO Phone 2
- [ ] CO Phone 3
- [ ] CO Fax
- [x] Job Number
- [x] Address
- [x] Subdivision
- [x] Sales Rep
- [ ] Sales Rep Email

Client List cont.

- [ ] Sales Team
- [ ] Realtor
- [x] Superintendent
- [x] Model
- [x] Elevation
- [ ] Added Date
- [ ] Final Closing
- [ ] Stage
- [ ] Contract Signed

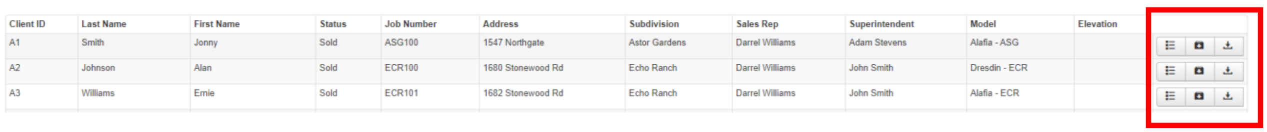
Clients

Group by

Client ID	Last Name	First Name	Status	Job Number	Address	Subdivision	Sales Rep	Superintendent	Model	Elevation
A1	Smith	Jonny	Sold	ASG100	1547 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	
A2	Johnson	Alan	Sold	ECR100	1680 Stonewood Rd	Echo Ranch	Darrel Williams	John Smith	Dresdin - ECR	
A3	Williams	Ernie	Sold	ECR101	1682 Stonewood Rd	Echo Ranch	Darrel Williams	John Smith	Alafia - ECR	

<u>Client List ICONS</u>
Software Report: WEBP-Several

Client List ICONS located on the far right are determined based on the User Group setting.



Client ID	Last Name	First Name	Status	Job Number	Address	Subdivision	Sales Rep	Superintendent	Model	Elevation
A1	Smith	Jonny	Sold	ASG100	1547 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	
A2	Johnson	Alan	Sold	ECR100	1680 Stonewood Rd	Echo Ranch	Darrel Williams	John Smith	Dresdin - ECR	
A3	Williams	Ernie	Sold	ECR101	1682 Stonewood Rd	Echo Ranch	Darrel Williams	John Smith	Alafia - ECR	

<u>Web Portal User Groups</u>
These User Group settings also relate to access levels for Document Management.

User Groups are defined as follows.

Group	Sub Group	To-Dos	Client Docs	Job Docs	V-Job Docs
Office	Office Admin Office-Management Office	Yes	Yes	Yes	Yes
Sales	Sales and Design Marketing	Yes	Yes	No	Yes
Field	Superintendent- Construction Manager Project Manager	Yes	No	Yes	Yes
Warranty	Warranty Manager Warranty Tech	Yes	Yes - Limited	No	Yes
Vendor	Vendor-Admin Vendor-Acct Vendor-Field	Yes – Limited-Warranty	No	No	Yes
Customer		Yes – Limited-Warranty	Yes - Limited	No	No

ICONS for **Office Admin, Office Management and Office**

- Client Level ToDos
- Client Docs
- Job Docs

ICONS for **Field-Superintendent-Construction Manager-Project Manager**

- Client Level ToDos
- Job Docs

ICONS for **Sales-Design**

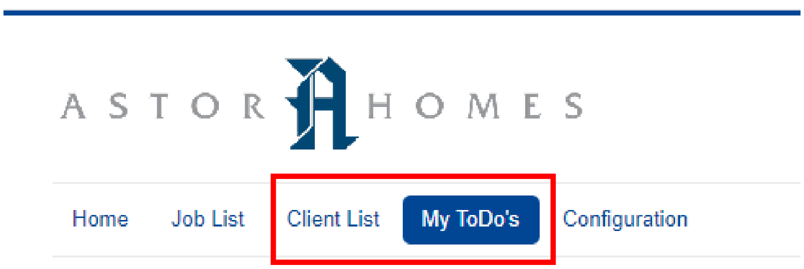
- Client Level ToDos
- Client Docs
- Vendor-Job Docs

An Overview of the To-Do structure in the WebPortal
Software Report: WEBP-Several

The WebPortal now supports the management of all To-Do types for all users. All users must be added to the Gemini User Maintenance to enable company wide To-Do management. This does not allow these users to log in directly to Gemini, nor does it impact simultaneous license levels.

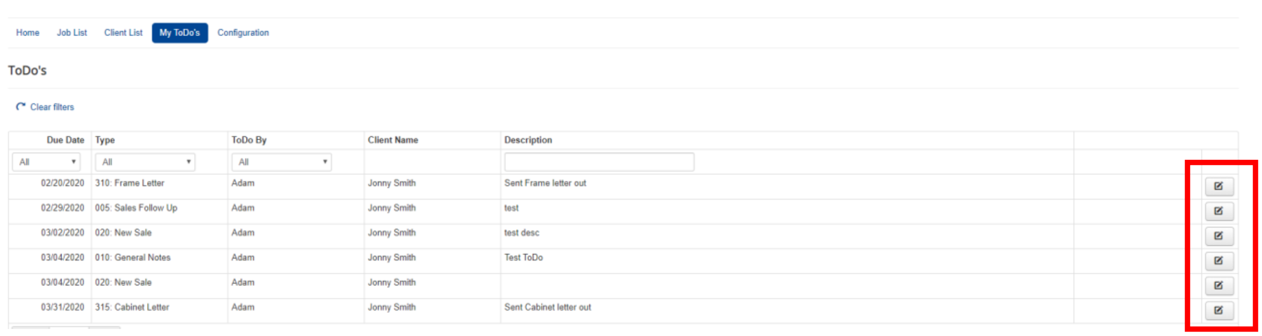
- MY TO-DO's works very similar to the PSClient program. This will display all the OPEN To-Do's assigned to the logged in user.

- CLIENT LIST displays an icon to access To-Do's under each client and works very similar to how Client level To-Dos are displayed and managed in PSClient.



My ToDo's in the WebPortal
Software Report: WEBP-Several

Selecting the My ToDo's menu will display a list of Open To-Dos assigned to you. On the far right you see ICONS to allow the EDIT of existing ToDo's.

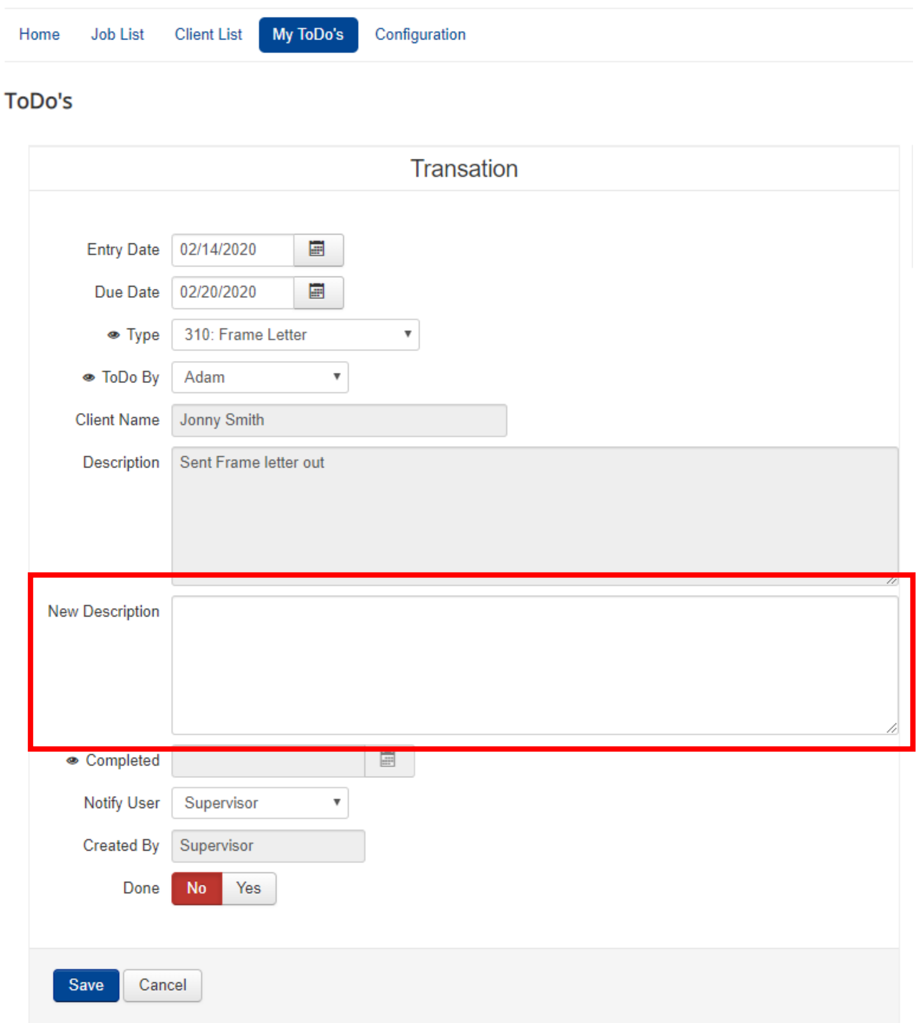


How to update a ToDo from the My ToDo's menu

Software Report: WEBP-Several

Selecting the EDIT button on the far right presents the EDIT To-Do window. PSClient users will be familiar with most of the fields presented below. Notice the DESCRIPTION field is different – this allows the WebPortal users to add notes in the NEW DESCRIPTION window. These newly added descriptions will be appended to the existing description. This prevents the WebPortal user from removing description text that was previously added.

The user can mark the To-Do as DONE with a COMPLETED DATE. Once marked as completed this To-Do will drop off the My To-Do list – however the To-Do is still listed under the Client's record.



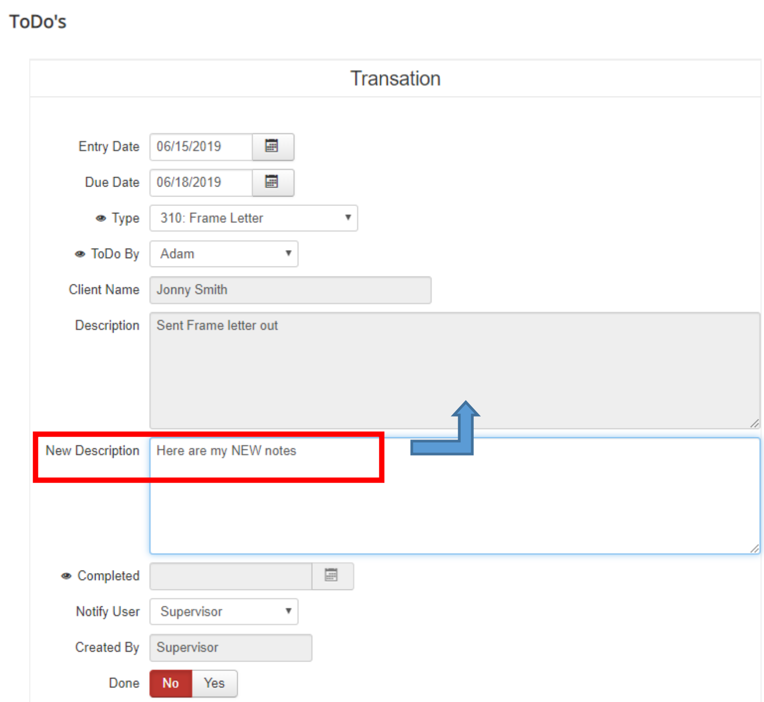
Adding NEW DESCRIPTION and the User-Date stamp

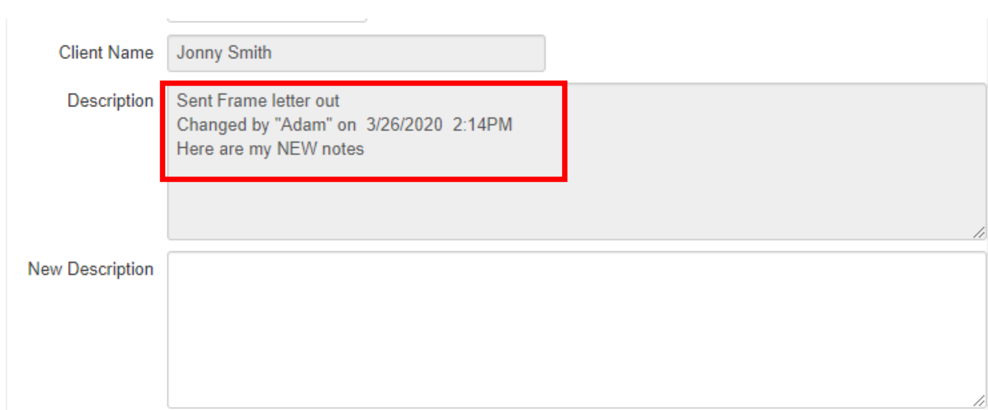
Software Report: WEBP-Several

When a user adds text into the NEW DESCRIPTION field – notice how the entry updates and then also adds the users name and a date-time indicating when the notes were added.

Changed by "Adam" on 3/26/2020 2:14 PM

This provides users with more date-time and user information when looking over ToDo notes. This username and date-time stamp are also updated in PSClient.

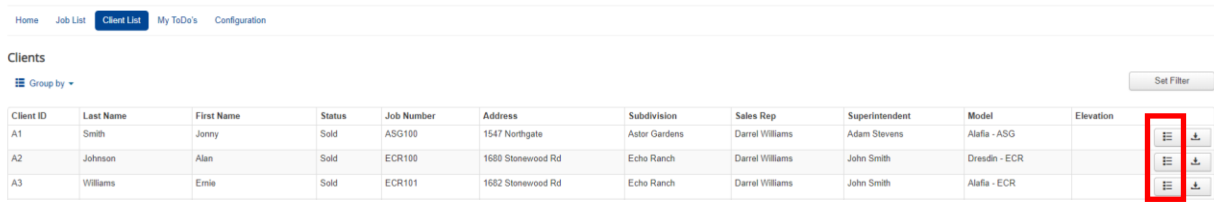




CLIENT ToDo's in the WebPortal

Software Report: WEBP-Several

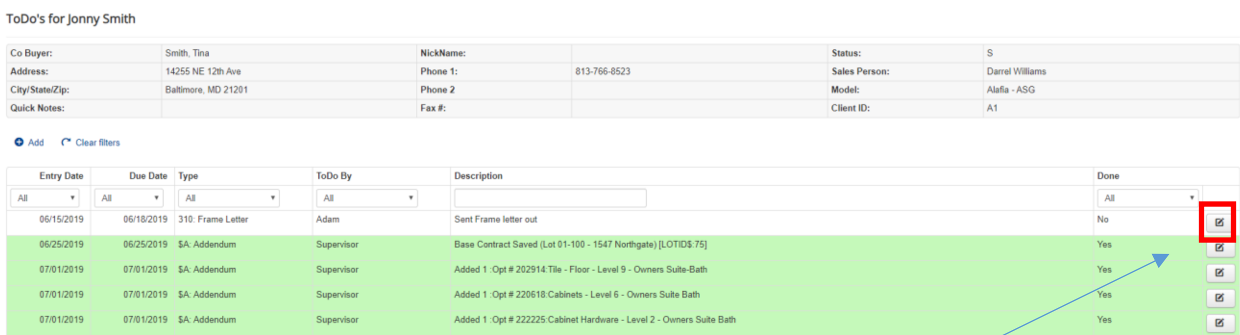
The Client List menu present a list of all clients and can be filtered to find a specific client and/or a group of clients. To access the CLIENT-TO-DO's select the icon on the far right.



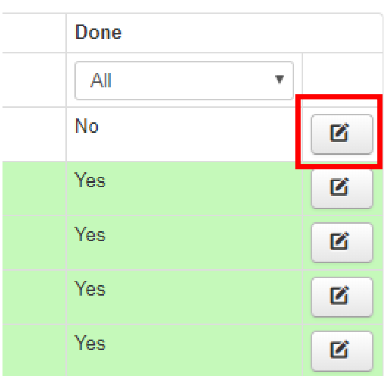
How to update a ToDo from the Client List menu

Software Report: WEBP-Several

Select the ToDo ICON on the far right in the selected client row, this will drill down into the To-Do's for that specific client. This is similar to selecting the TRANSACTION button in PSClient when a specific client is highlighted. This presents some client header information as well as the list of ALL ToDos for this client.

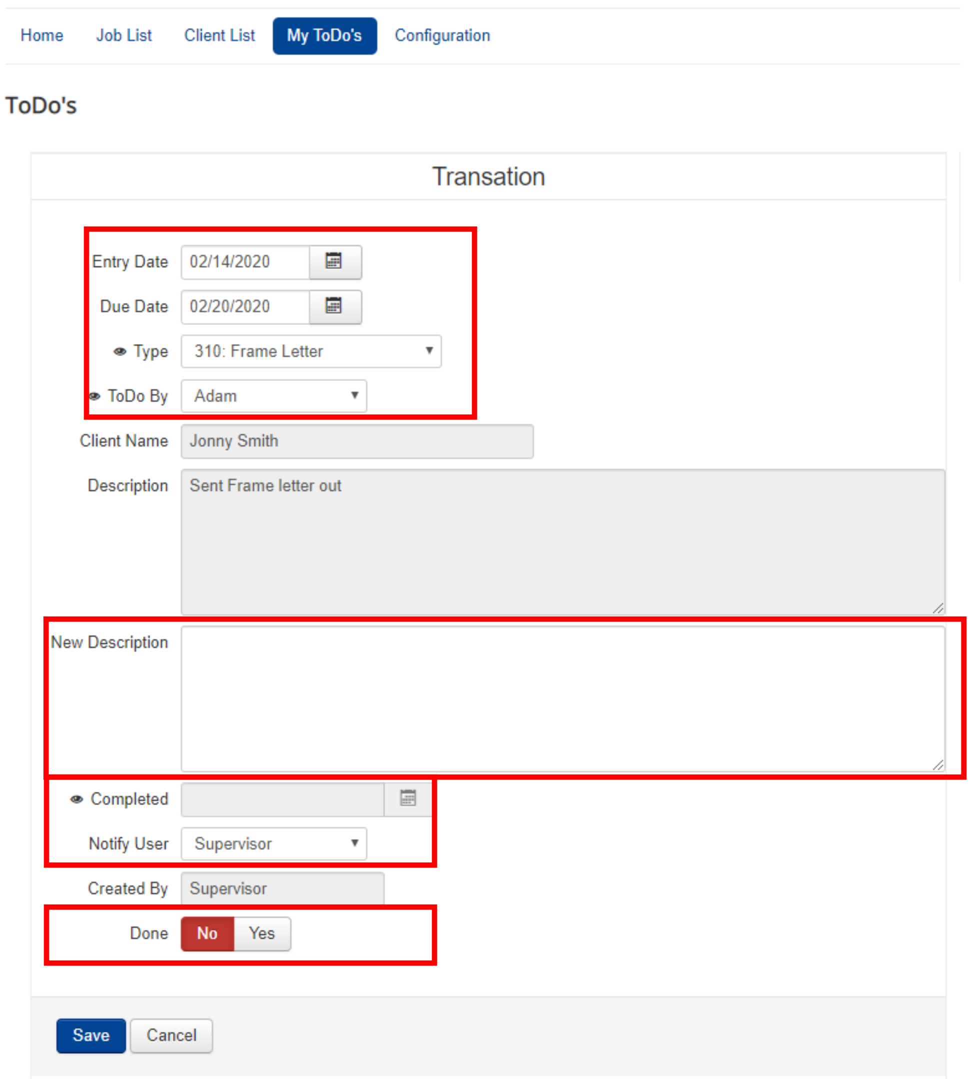


To update (edit) a specific To-Do select the icon on the far right.



<u>ToDo's – Which FIELDS can be changed from the WebPortal</u>
Software Report: WEBP-Several

ToDos in the portal work very similar to how they work in PSClient. When editing an existing To-Do these fields can be changed – provided the user is the ToDoBy person.



The Client ToDo List
Software Report: WEBP-Several

When viewing the list of ToDos for a specific Client – the WebPortal offers a few more features beyond the PSClient application.

- Users can access these from their phone or tablet without logging into PSClient
- Users can filter by Entry Date, Due Date, ToDo Type and ToDo By

Entry Date	Due Date	Type	ToDo By	Description
All	All	All	All	
06/15/2019	06/18/2019	310: Frame Letter	Adam	Sent Frame letter out
06/25/2019	06/25/2019	$A: Addendum	Supervisor	Base Contract Saved (Lot 01-100 - 1547 Northgate) [LOTID$:75]
07/01/2019	07/01/2019	$A: Addendum	Supervisor	Added 1 :Opt # 202914:Tile - Floor - Level 9 - Owners Suite-Bath

- Users can filter by description or partial description

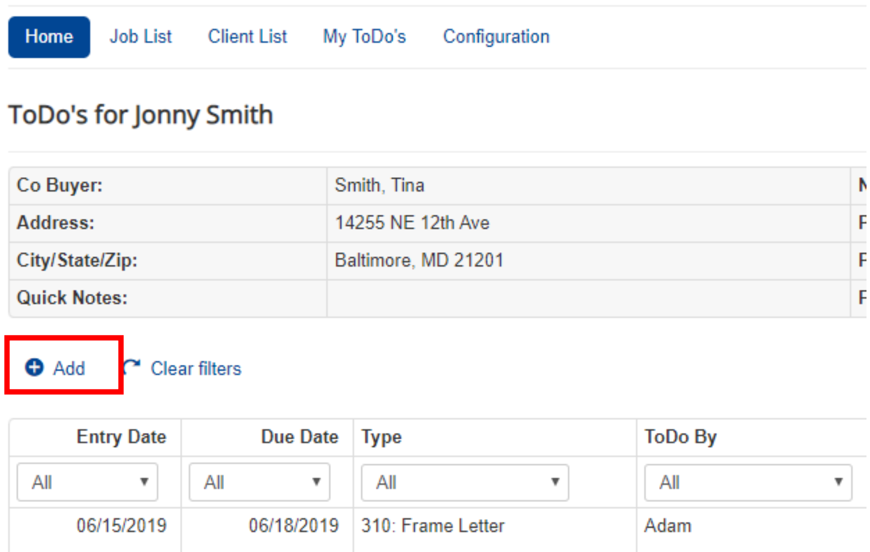
Entry Date	Due Date	Type	ToDo By	Description
All	All	All	All	202914
07/01/2019	07/01/2019	$A: Addendum	Supervisor	Added 1 :Opt # 202914:Tile - Floor - Level 9 - Owners Suite-Bath

- Users can filter DONE or Not Done. ToDo's can be color coded based on completion. The GREEN represents DONE

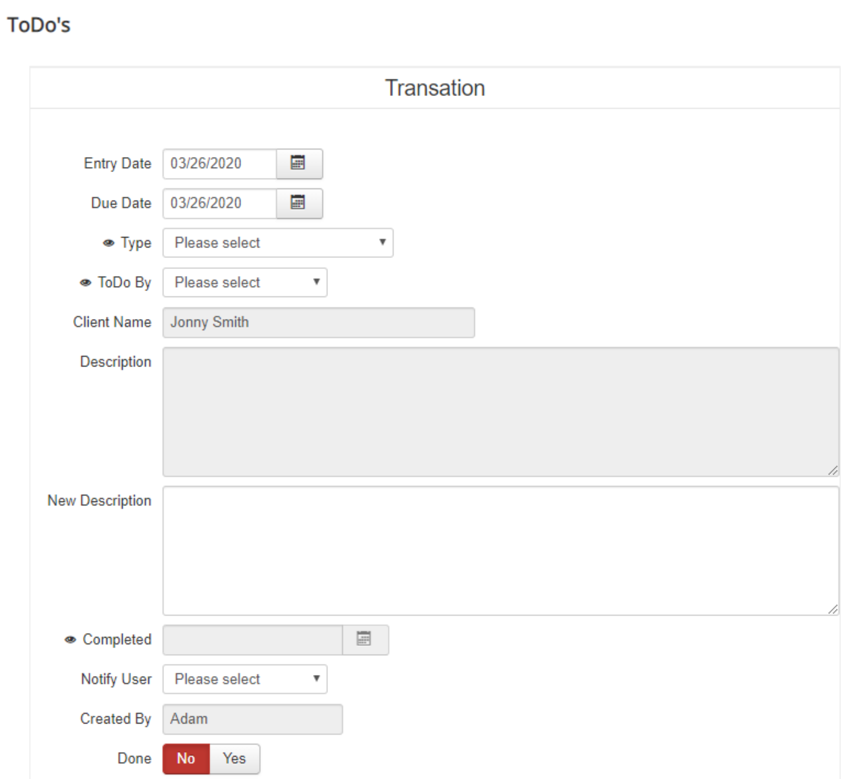
Done
All
No
Yes
Yes
Yes
Yes
Yes

<u>Creating a ToDo in the WebPortal</u>
Software Report: WEBP-Several

A user can create new ToDo's under each client by selecting the ADD button.

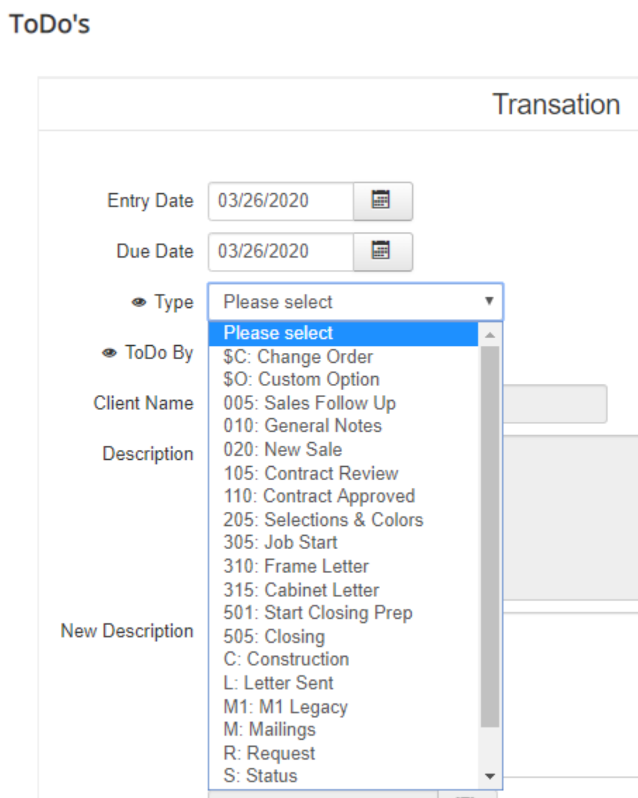


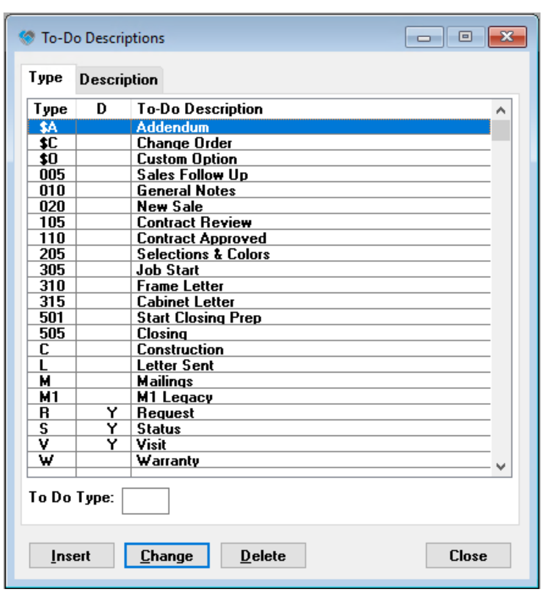
This will display the window below and the user can complete the required fields



Creating New ToDos by TYPE
Software Report: WEBP-Several

The WebPortal allows users to create the ToDo utilizing all the Builders ToDo - TYPE configurations. If the Builder adds new ToDo Types and Descriptions in PSClient these will be automatically updated into the WebPortal.

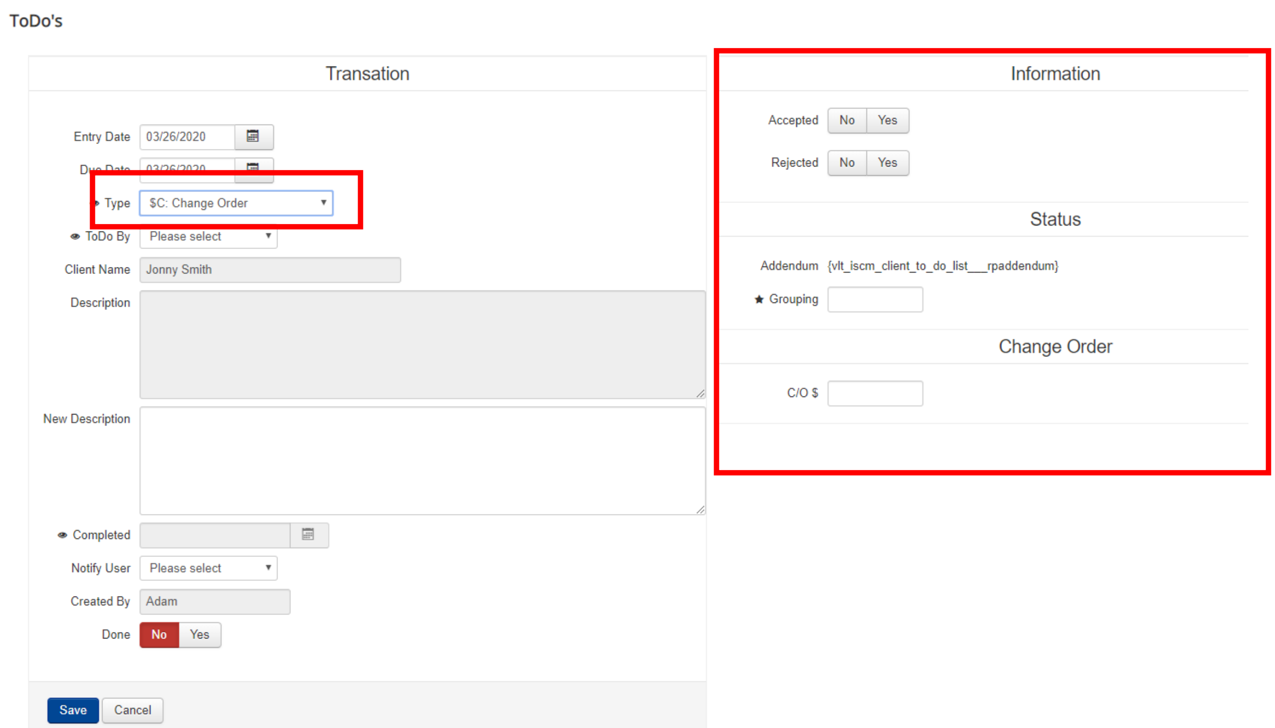




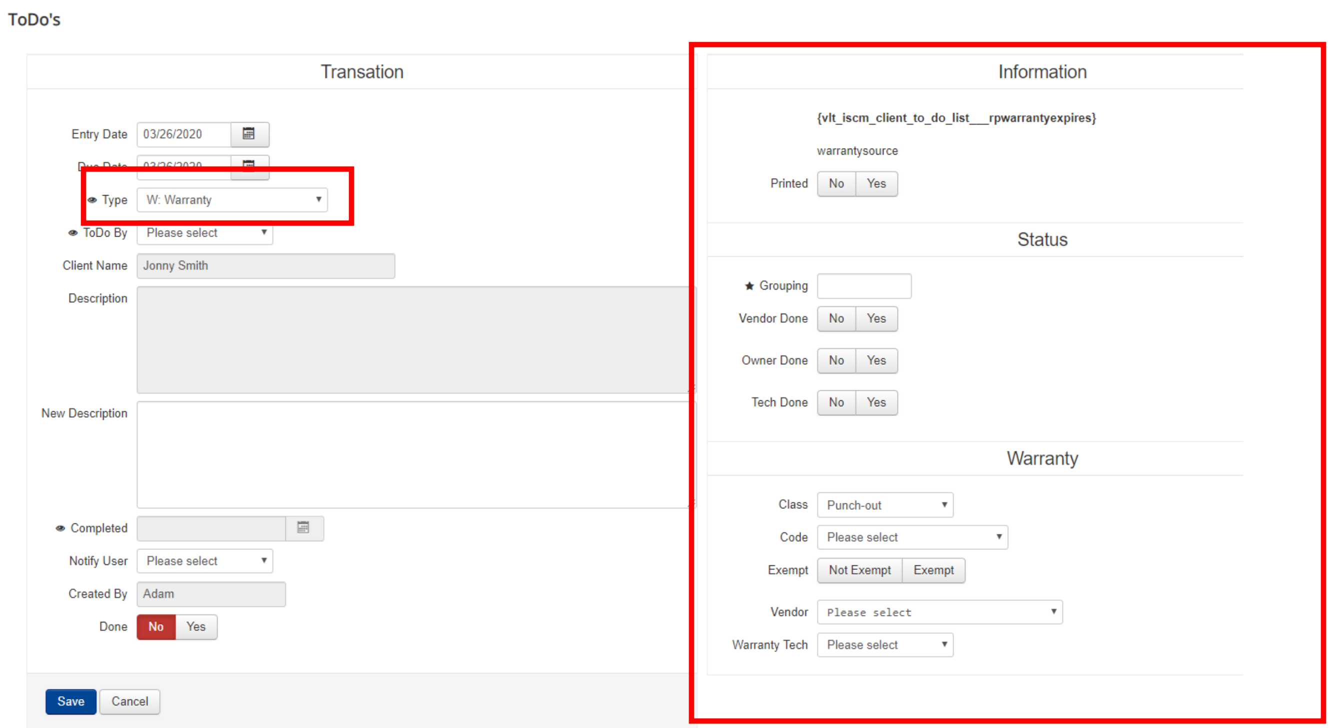
<u>Creating New ToDos by TYPE – the fields change</u>
Software Report: WEBP-Several

When the user selects the ToDo Type – the WebPortal will display the appropriate fields.

A CHANGE ORDER ToDo displays these fields on the right



A WARRANTY ToDo displays these fields on the right



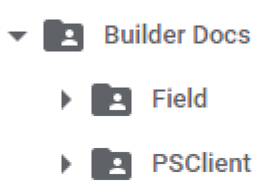
An Overview of Document Management in the WebPortal

Software Report: WEBP-Several

The WebPortal Document Management method offers significant advances over the current PSClient-Client Documents and the GemWeb application. Here are just a few of these improvements.

- Documents are no longer stored on the same server as the application data. This is a security precaution and will prevent any viral-malware-ransomware attack that might be secretly hidden within an uploaded file to contaminate your PSClient-Eclare-Gemini data.
- Document uploads are easier as Drag & Drop with multiple files is now available.
- Documents can be easily shared with vendors and other parties outside of your organization.
- The Doc Management system integrates with Google Drive which provides a robust and secure environment with unlimited storage potential at a reasonable price.
- Users can open and edit certain file types directly in their browser.
- Users can use the comment feature – highlight areas and add notes to documents.
- Users can use the @mention feature to automatically email other users and link them into a discussion on a specific document.

All Builder Documents are divided into two categories: FIELD-JOB DOCS and PSCLIENT-CLIENT DOCS



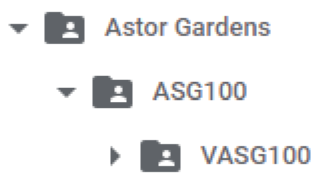
FIELD Job Docs – can be accessed in the FIELD by your superintendents, sales staff and vendors

PSCLIENT Client Docs – are more internal documents accessed by your office personnel

FIELD – JOB DOCUMENTS

Expanding the FIELD-Job Doc folders we notice there are two folders for each job. In the example below we have a PROJECT or SUBDIVISION named Astor Gardens. ASG100 is a job number and the folder ASG100 will contain files for the superintendent.

VASG100 (where the V stands for Vendor) will contain files for the superintendents, sales staff and vendors.



Job docs are the documents a builder will distribute to the field, so that their superintendents and vendors can gain access to specific documents on a job. The Job Docs folder structure has two levels.

- There is a **Job Folder** and a **Vendor-Job Folder**
- Files placed in the Job Folder will be accessible by the Job Superintendent and Project Managers
- Files placed in the Vendor-Job Folder will be accessible by the Vendor, Salespeople as well as the Job Superintendent and Project Managers
- Office users have access to both the **Job Folder** and a **Vendor-Job Folder**

<u>Document Management – Job Docs – Viewing for job # ASG100</u>
Software Report: WEBP-Several

The screenshot below shows the Job-Doc folder for job # ASG100. Notice the folder contains 7 files and a SUBFOLDER named VASG100 (or V-Job Number).

ASTOR HOMES

Home | Client List | My ToDo's | Gemini Users | Configuration

Files for ASG100

8 files and folders.

Name	Size	Modified	Uploaded
VASG100		03-03-2020 01:37 PM	03-03-2020 01:37 PM
ASG100 - ARB Approval.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Energy Calcs.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Final Plans.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - NOC.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Permit.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
ASG100 - Plot Plan.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
TakeOff Report.pdf	261,455	03-16-2020 03:09 PM	03-16-2020 03:09 PM

<u>Job Docs</u>
Job Superintendents can view

Clicking on the VASG100 will display the files in the Vendor-Job Docs folder. Notice the folder contains 7 "different" files and UPFOLDER navigation.

Files for ASG100

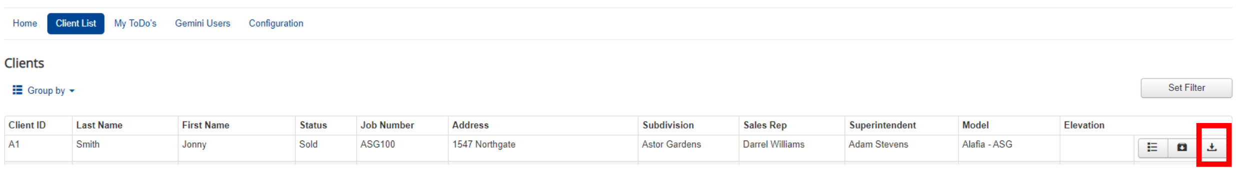
7 files and folders.

Name	Size	Modified	Uploaded
Up to parent folder			
ASG100 - Ext Color Rendering.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Ext Paint Diagram.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Landscape Plan.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Landscape Table.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
ASG100 - Soil Test.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
ASG100 - Truss Design.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
Copy of ASG100 - Cabinet Drawings-Rev 1.pdf	36,172	03-10-2020 10:42 AM	03-10-2020 10:42 AM

<u>Vendor-Job Docs</u>
Job Superintendents, Vendors and Sales can view

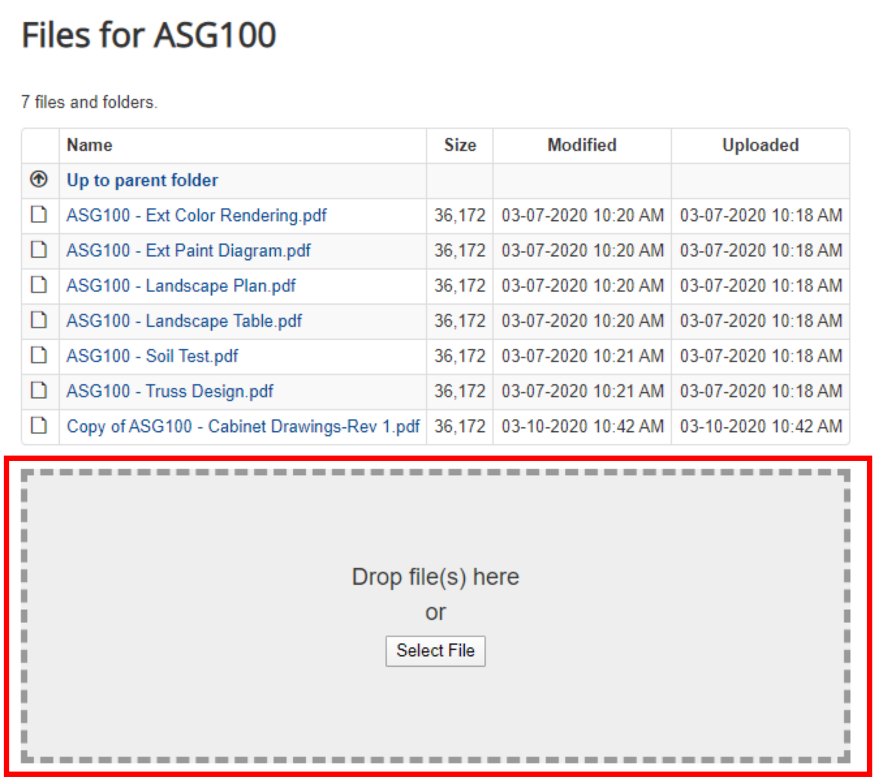
<u>Document Management – Job Docs – Uploading for job # ASG100</u>
Software Report: WEBP-Several

From the Client List select the Job Docs Button



Client ID	Last Name	First Name	Status	Job Number	Address	Subdivision	Sales Rep	Superintendent	Model	Elevation
A1	Smith	Jonny	Sold	ASG100	1547 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	

To upload files to a specific Job Doc folder a user can DRAG and DROP files into the box shown.



	Name	Size	Modified	Uploaded
	Up to parent folder			
	ASG100 - Ext Color Rendering.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
	ASG100 - Ext Paint Diagram.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
	ASG100 - Landscape Plan.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
	ASG100 - Landscape Table.pdf	36,172	03-07-2020 10:20 AM	03-07-2020 10:18 AM
	ASG100 - Soil Test.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
	ASG100 - Truss Design.pdf	36,172	03-07-2020 10:21 AM	03-07-2020 10:18 AM
	Copy of ASG100 - Cabinet Drawings-Rev 1.pdf	36,172	03-10-2020 10:42 AM	03-10-2020 10:42 AM

<u>Document Management – Job Docs – Creating the Job folders</u>
Software Report: WEBP-Several

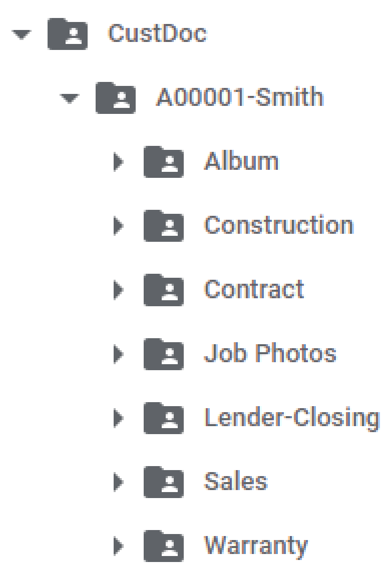
The WebPortal will automatically create the JOB FOLDER and V-JOB FOLDER the first time an office user selects the Job Docs button from the Client list or the Job List.

PSCLIENT- CLIENT DOCUMENTS

Expanding the PSClient-Client Doc folders will see this expands to show multiple folders under each client. If you are using PSClient you are already familiar with this folder logic.

The Folder A0001-Smith (where A0001 is the Client ID and SMITH is the clients last name).

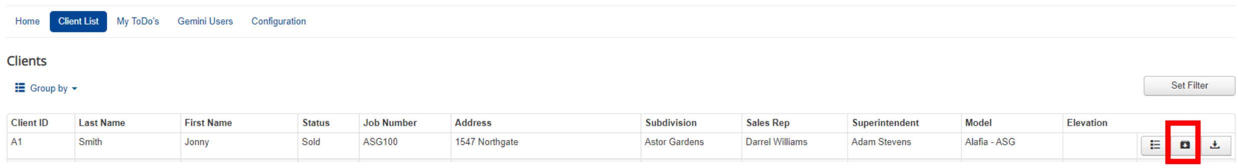
The Sub Folders are user definable and can be defined in PSClient CONFIGURATION. These sub folders are added automatically when an office user clicks on the Client Docs folder ICON from the WebPortal.



Document Management – Client Docs – Uploading Client Jonny Smith

Software Report: WEBP-Several

From the Client List select the Client Docs Button



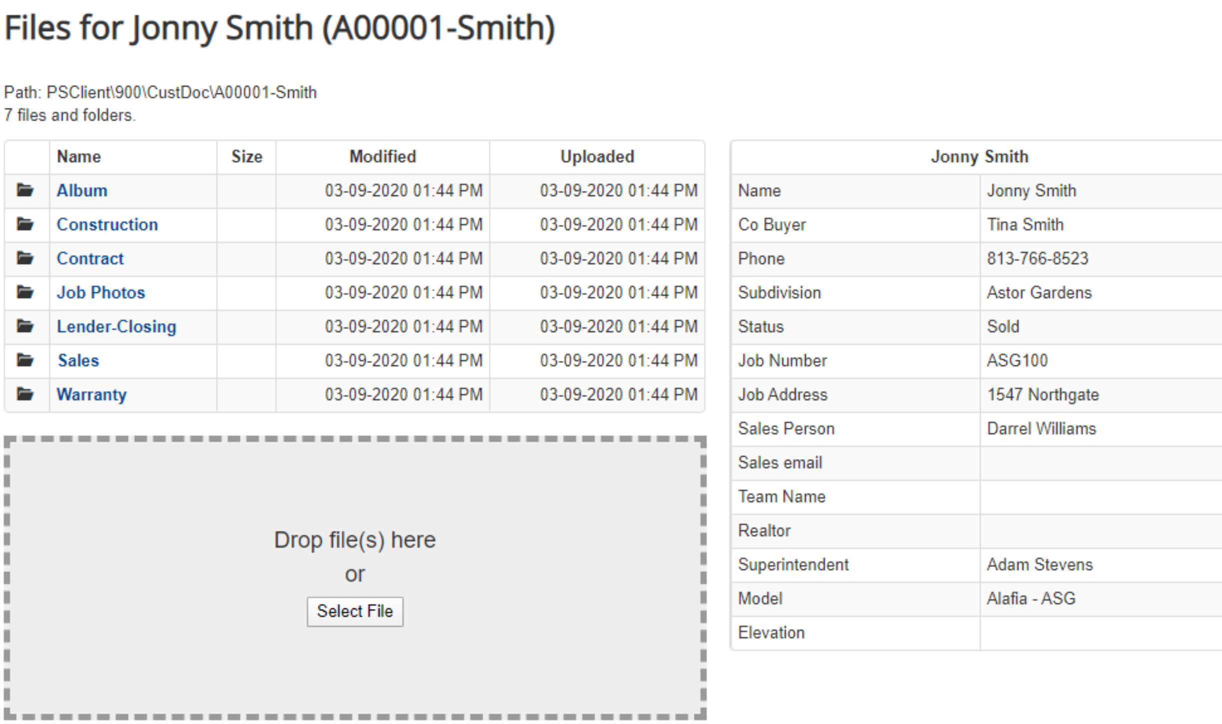
Home | Client List | My ToDo's | Gemini Users | Configuration

Clients

Group by

Set Filter

Client ID	Last Name	First Name	Status	Job Number	Address	Subdivision	Sales Rep	Superintendent	Model	Elevation
A1	Smith	Jonny	Sold	ASG100	1547 Northgate	Astor Gardens	Darrel Williams	Adam Stevens	Alafia - ASG	



Files for Jonny Smith (A00001-Smith)

Path: PSClient\900\CustDoc\A00001-Smith
7 files and folders.

Name	Size	Modified	Uploaded
Album		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Construction		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Contract		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Job Photos		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Lender-Closing		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Sales		03-09-2020 01:44 PM	03-09-2020 01:44 PM
Warranty		03-09-2020 01:44 PM	03-09-2020 01:44 PM

Drop file(s) here
or
Select File

Jonny Smith	
Name	Jonny Smith
Co Buyer	Tina Smith
Phone	813-766-8523
Subdivision	Astor Gardens
Status	Sold
Job Number	ASG100
Job Address	1547 Northgate
Sales Person	Darrel Williams
Sales email	
Team Name	
Realtor	
Superintendent	Adam Stevens
Model	Alafia - ASG
Elevation	

Document Management – Client Docs – Creating the Client folders

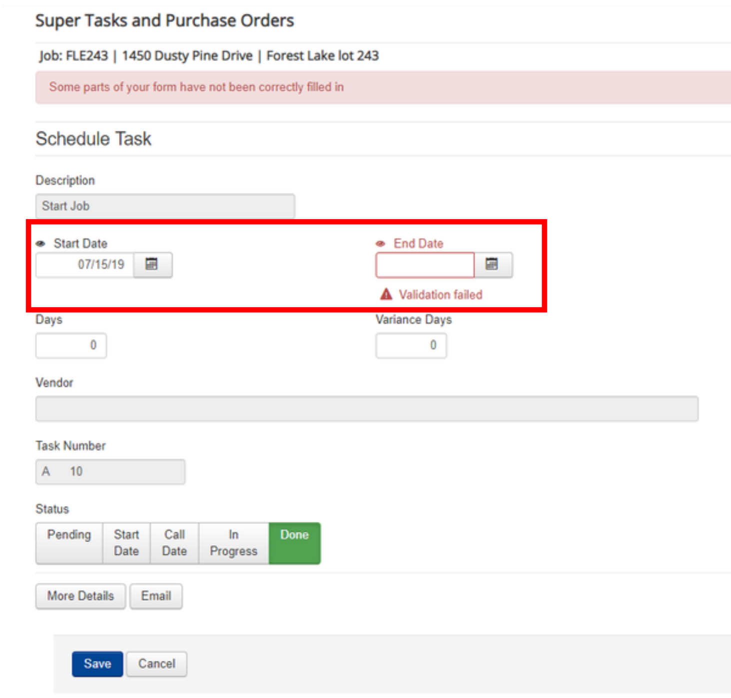
Software Report: WEBP-Several

The WebPortal will automatically create the Client Doc folder and the subfolders the first time an office user selects the Client Docs button from the Client list.

Construction Schedule Set START DATE and END DATE

Software Report: WEBP-201

Set the START DATE and END DATE as required fields for construction TASKS.



User Configuration – as PM

Software Report: WEBP-209

When a Project Manager (PM) is viewing a PO/TASK assigned to a Superintendent – the configuration settings for the DATE and Vendor Status should be based on the PM settings. WEBP-209 addresses this requirement.

Quick Filter – separate filter logic

Software Report: WEBP212

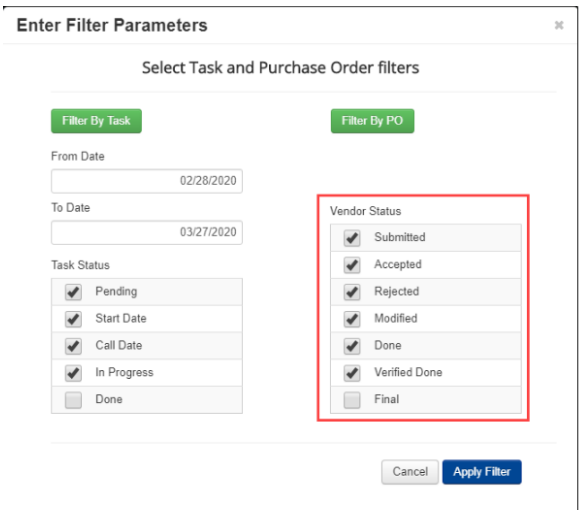
We separated the code logic for the Quick Filter and the other filter options to make the interface more intuitive and easier to understand.

Vendor Log In - Filters

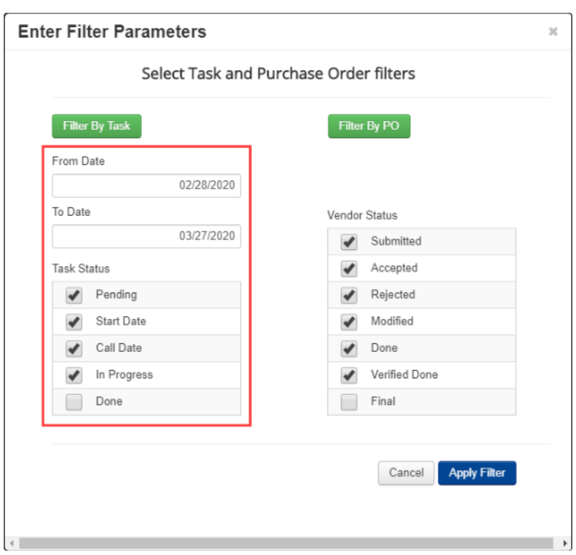
Software Report: WEBP-206

This describes changes to be made to the way the filter on the Combined Task and PO list behaves for the Vendor. This was done to make the filter more intuitive and easier for vendors to understand the displayed results.

When the FILTER BY PO (Vendor PO Status) is used the TASK filter will be ignored.



When the FILTER BY TASK (Schedule TASK Status) is used the PO filter will be ignored.

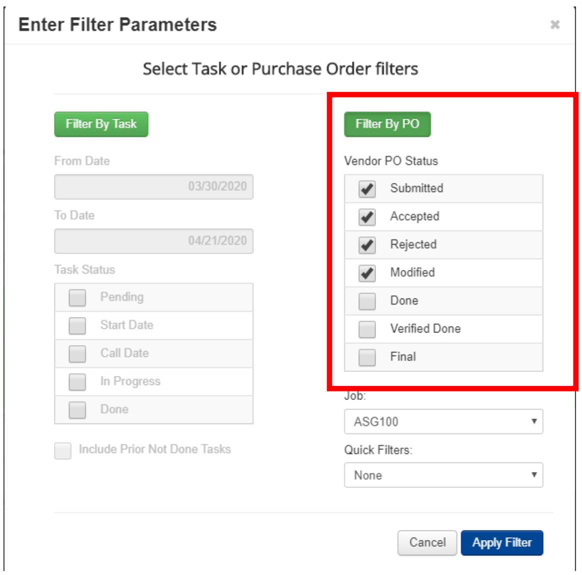


Superintendent and PM Log In - Filters

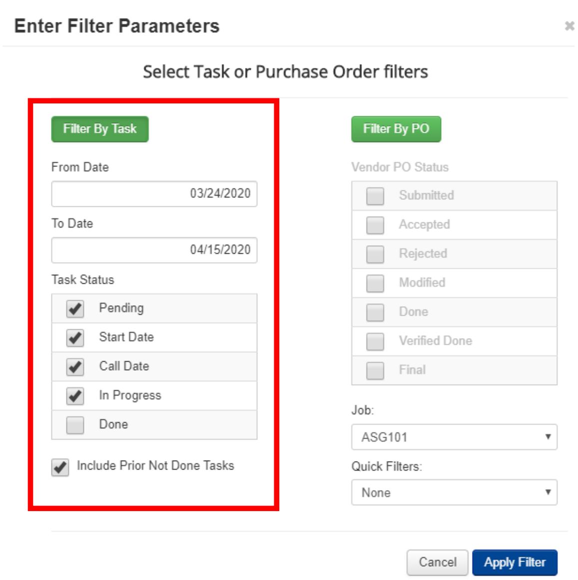
Software Report: WEBP-205a

This describes changes to be made to the way the filter on the Combined Task and PO list behaves for the Superintendent and PM. This was done to make the filter more intuitive and easier for users to understand the displayed results.

When the FILTER BY PO (Vendor PO Status) is used the TASK filter will be ignored.



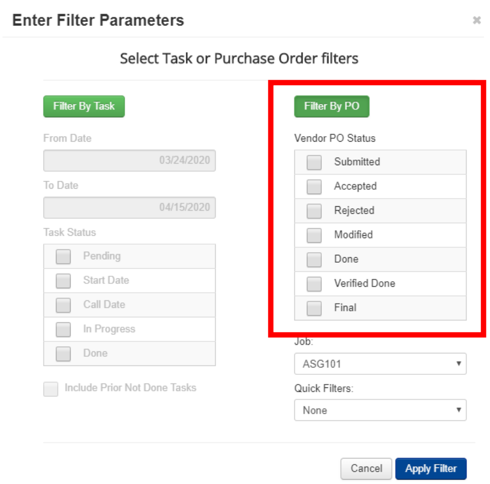
When the FILTER BY TASK (Schedule TASK Status) is used the PO filter will be ignored.

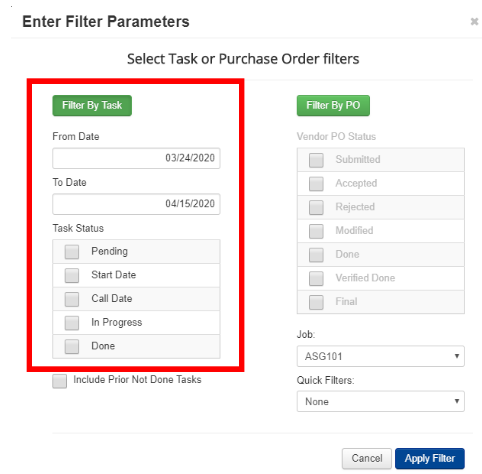


Superintendent and PM Log In - Filters

Software Report: WEBP-205b

When FILTER BY PO – the TASK side will be greyed and not selectable.
When FILTER BY TASK – the PO side will be greyed and not selectable.

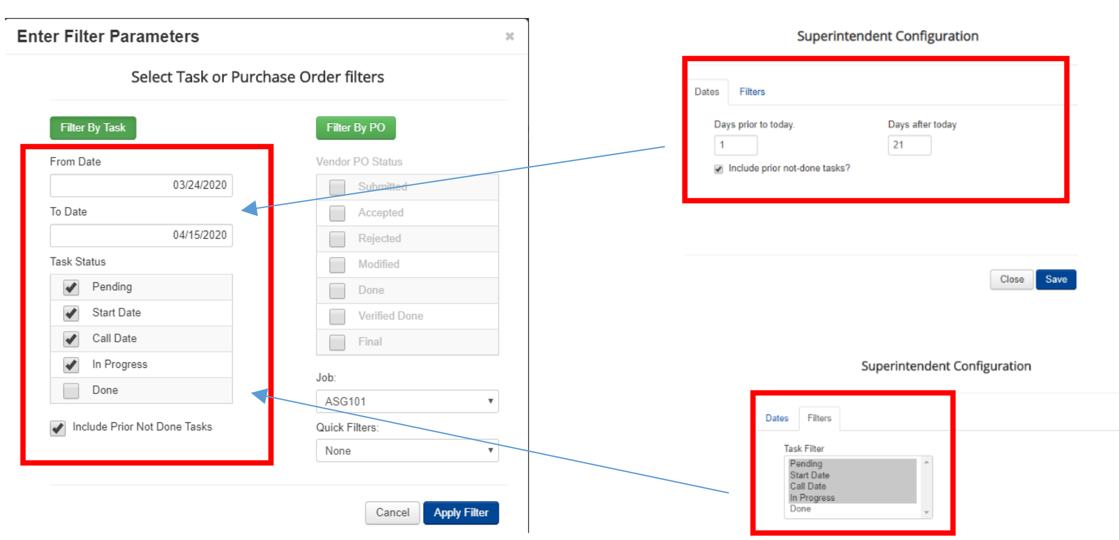




Superintendent and PM Log In - Filters

Software Report: WEBP-205c

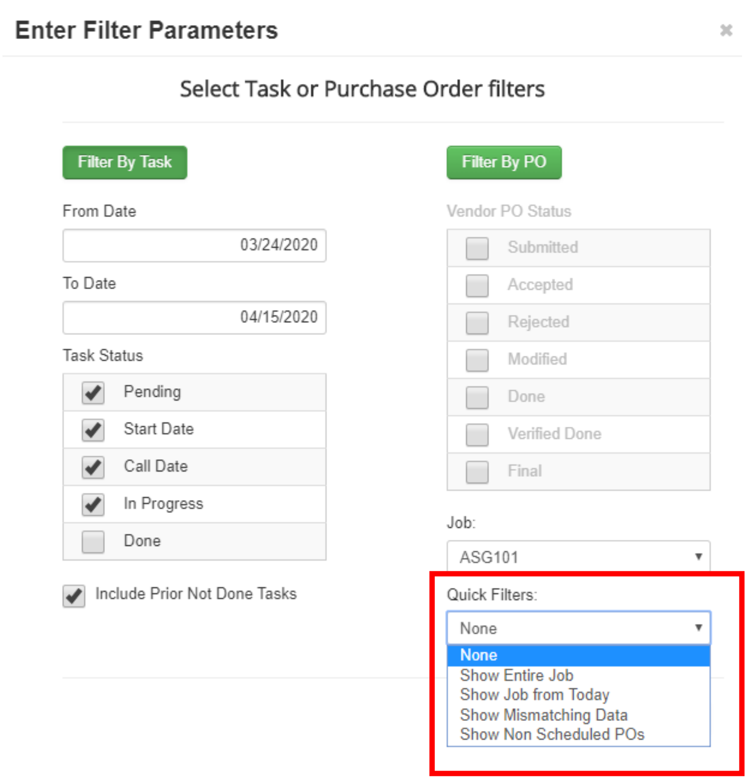
Set DEFAULTS to auto-load into the FILTER BY TASK based on the users CONFIGURATION defaults. Also added the INCLUDE PRIOR NOT DONE TASKS as an option to allow easier ON/OFF selection from the filter window without the need to go back to the CONFIG window.



Superintendent and PM Log In - Filters
Software Report: WEBP-205d

Made changes to the QUICK FILTERS as follows

- When Quick Filters are utilized – all other filter options are ignored
- Show Entire Job – no changes – shows the entire job, including NON-Task assigned PO's
- Show Job From Today – using todays date – displays only tasks from today forward – ignores all prior TASKS regardless of task status
- Show Mismatching Data – shows rows that meet either of these criteria
    - TASK vendor and PO Vendor – have different assignments
    - TASK is status = DONE and PO is NOT Verified Done
    - PO status = Verified Done and TASK is anything except DONE
- Show Non-Schedule PO's (NEW) This can be used to identify any PO's with no task assigned (for example a VPO)



Bug Fix – Vendor Log In Task List Columns and Defaults
Software Report: WEBP-202

Fixed the Vendor Default Config to display certain columns. The Task Duration (Number of Days) column was not displaying when checked on.

PO Vendor Status: For Status equal to Pending
Software Report: BIWS-31

Coded the BIWS to NOT send any Purchase Order details to the WebPortal if the PO Vendor Status is marked as PENDING.

The Software Reports listed below were also part of an early release of version 2020. Some builder businesses may already have these features installed prior to this release.

Removed the CALCULATE button – made this automatic

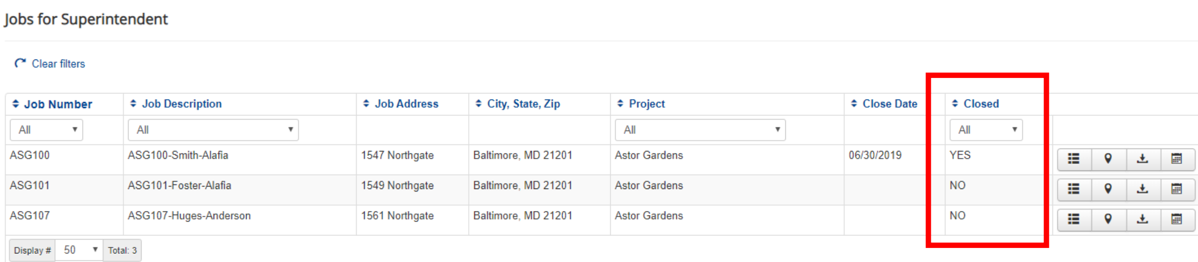
Software Report: WEBP-Several

Changed the logic in how the construction schedule updates made in the WebPortal were synced with PSClient. This is now fully automated and no need for users to select the CALCULATE button. The CALCULATE button has been removed.

Add filtered column for Job Close Status

Software Report: WEBP-138

Added a logical column for the Job Close – when Gemini has a close date this column will have a YES. This allows users to filter by closed and retain sort by.



Jobs for Superintendent

Clear filters

Job Number	Job Description	Job Address	City, State, Zip	Project	Close Date	Closed
All	All			All		All
ASG100	ASG100-Smith-Alafia	1547 Northgate	Baltimore, MD 21201	Astor Gardens	06/30/2019	YES
ASG101	ASG101-Foster-Alafia	1549 Northgate	Baltimore, MD 21201	Astor Gardens		NO
ASG107	ASG107-Huges-Anderson	1561 Northgate	Baltimore, MD 21201	Astor Gardens		NO

Display # 50 Total: 3

Bug Fix the Builder-Admin Configuration

Software Report: WEBP-137

The builder admin was not working properly regarding show or hide specific columns for the SUPERINTENDENTS lists. This has been corrected.

Rows to Show – set to 50

Software Report: WEBP-133

The show number of rows has been set to a default of 50. This was requested by several superintendents and PM's. Previously this was set to 10.

Vendor TASK sort order

Software Report: WEBP-131

Changed default sort logic for the Vendor Log in on the Construction TASK menu to sort by START DATE (descending) and then TASK ID (descending).

Bug Fix – Vendor User No PO's

Software Report: WEBP-129 / WEBP-106

Corrected filter logic for the vendor users that are added by the Vendor-Admin user. The Vendor-Admin user could see all PO's and Schedule Tasks; however, the other users were only able to view the Tasks – no PO's were displayed.

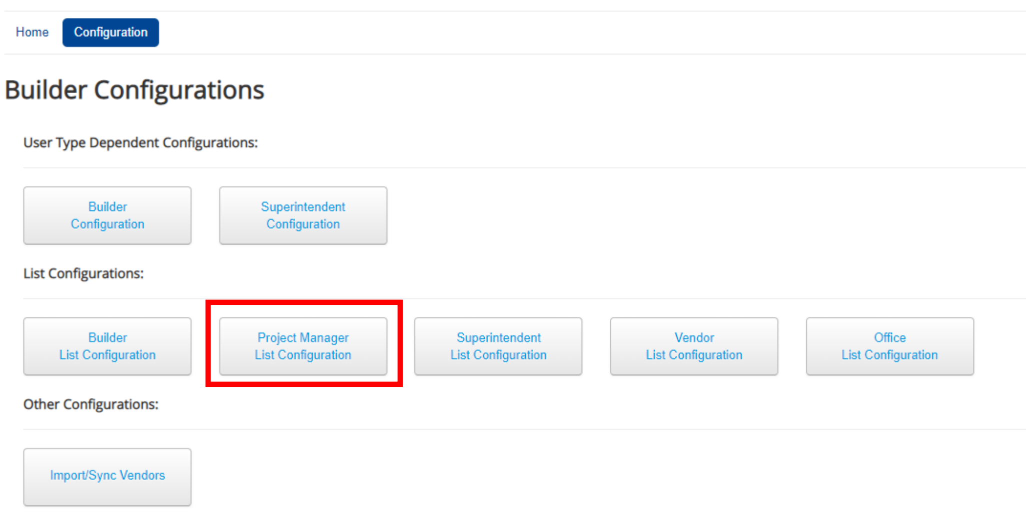
Added the Job-Documents button to the Vendor login

Software Report: WEBP-125

Added the ability for the vendors to link to the google drive document management folder to view documents for a specific job. In GDrive each job will have a Job Folder and a Vendor-Job Folder. In the example folder structure below – the job ASG100 has two folders (1) ASG100 and (2) VASG100

Added the Builder-Admin Configuration for the PM

Software Report: WEBP-136



Added the Project Manager to the webportal
Software Report: WEBP-135

The Project Manager is assigned jobs in Gemini. The PM Job List in the portal will display those jobs. The PM can further filter by SUPERINTENDENT, PROJECT, CLOSED/OPEN

The PM has the ability to update the Superintendent / Construction Manager job schedules and purchase orders.

Jobs for Project Manager

Clear filters

Job Number	Job Description	Job Address	City, State, Zip	Project	Superintendent	Close Date	Closed
				All	All		All
ASG100	ASG100-Smith-Alafia	1547 Northgate	Baltimore, MD 21201	Astor Gardens	Adam Stevens	06/30/2019	YES
ASG101	ASG101-Foster-Alafia	1549 Northgate	Baltimore, MD 21201	Astor Gardens	Adam Stevens		NO
ASG107	ASG107-Huges-Anderson	1561 Northgate	Baltimore, MD 21201	Astor Gardens	Adam Stevens		NO

Job List – show close date
Software Report: WEBP-120

Added the Gemini CLOSE DATE as a column in the Job List (Superintendent and Project Manager log in).

Tightened up the Schedule-PO page so SAVE & CANCEL are visible
Software Report: WEBP-118

Removed some white space, adjusted font sizes and generally tightened up the SCHEDULE-TASK-PO window to allow the SAVE / CANCEL buttons to appear higher. This eliminates the need to scroll down.

From Date-To Date – when using the FILTER
Software Report: WEBP-117

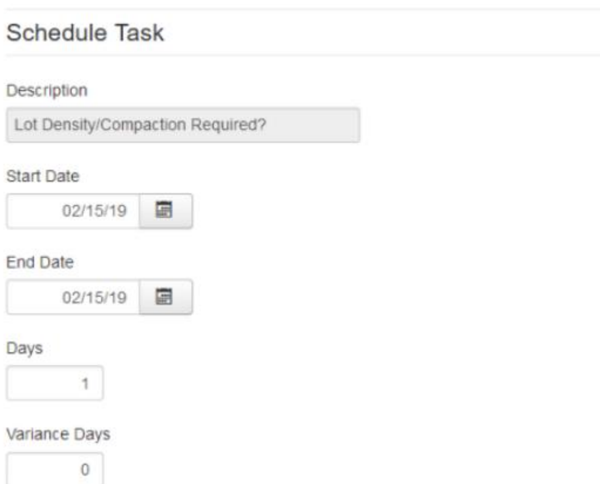
When using the filter – the date selection options were not displaying properly. This was corrected.

<u>Changed how the SCHEDULE-TASK-PO page loads</u>

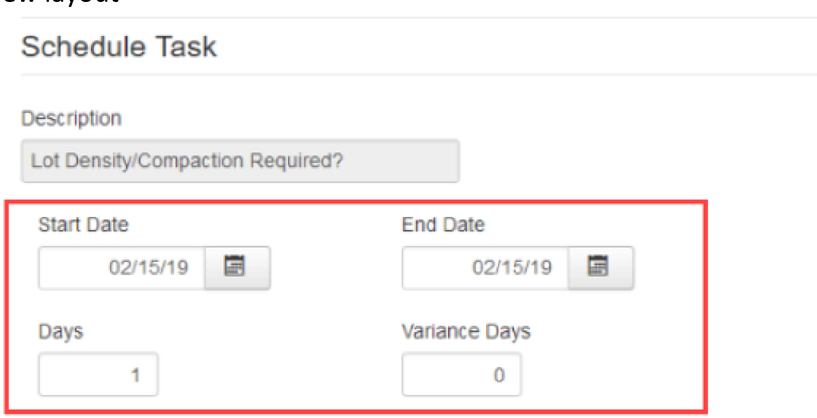
Software Report: WEBP-123

The controls for loading the Schedule Task & PO's were jumping after loading. This was changed to allow for a smoother – faster load.

Old layout



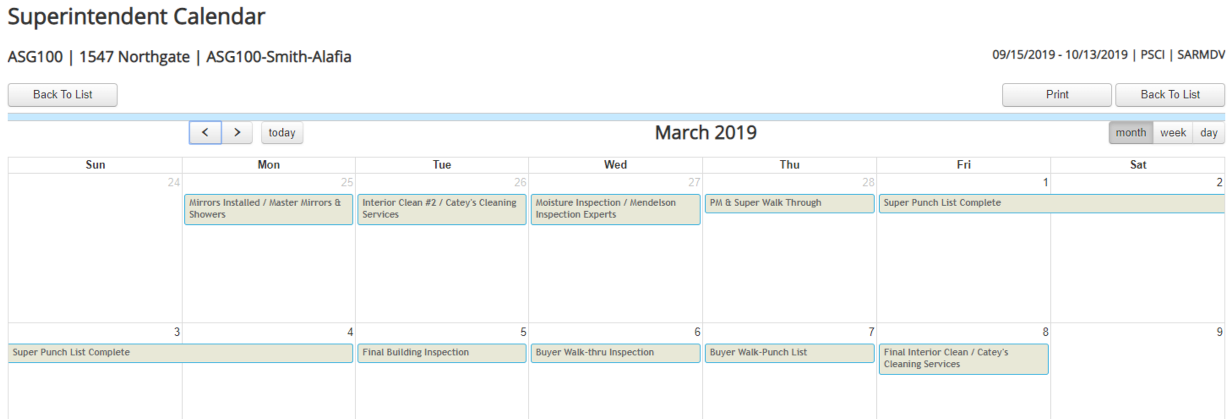
New layout



Active Calendar-Task Description wrap

Software Report: WEBP-122

Task Description and the Vendor Name will wrap in a single DAY cell to make it easier for the user to read the contents without drill down deeper.



User can now add SCHEDULE TASK notes via the webportal

Software Report: WEBP-116

Added ability for the SUPERINTENDENT, PROJECT MANAGER and/or VENDOR to add notes to the construction schedule task.

Bug Fix - Schedule Reason Code being displayed twice

Software Report: WEBP-115

The Reason Code listing was duplicating in the portal display – correct to show only 1 time.

Bug Fix – Change in how SQL file updates are processed

Software Report: WEBP-114

Modified the sequence in how build script files are processed.

Updated build script to extract master

Software Report: WEBP-112

Updated the internal tools associated with new builds. This adds another level of automation to rolling out new software releases.