ShipperBI™ Release Notes

Confidentiality Notice

SHIPPERBI™
PHASE II

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Overview

ShipperBI™ Phase II delivers targeted enhancements to improve system usability, performance, and reporting accuracy.

Enhancements

FAVORITES

In the navigation panel, the Favorites section allows users to pin important or frequently accessed reports. All reports marked as favorites, by clicking on the star on the top of the page, are listed in this section for easy access. If no reports are marked as favorites, the system displays an indication to reflect the empty state.
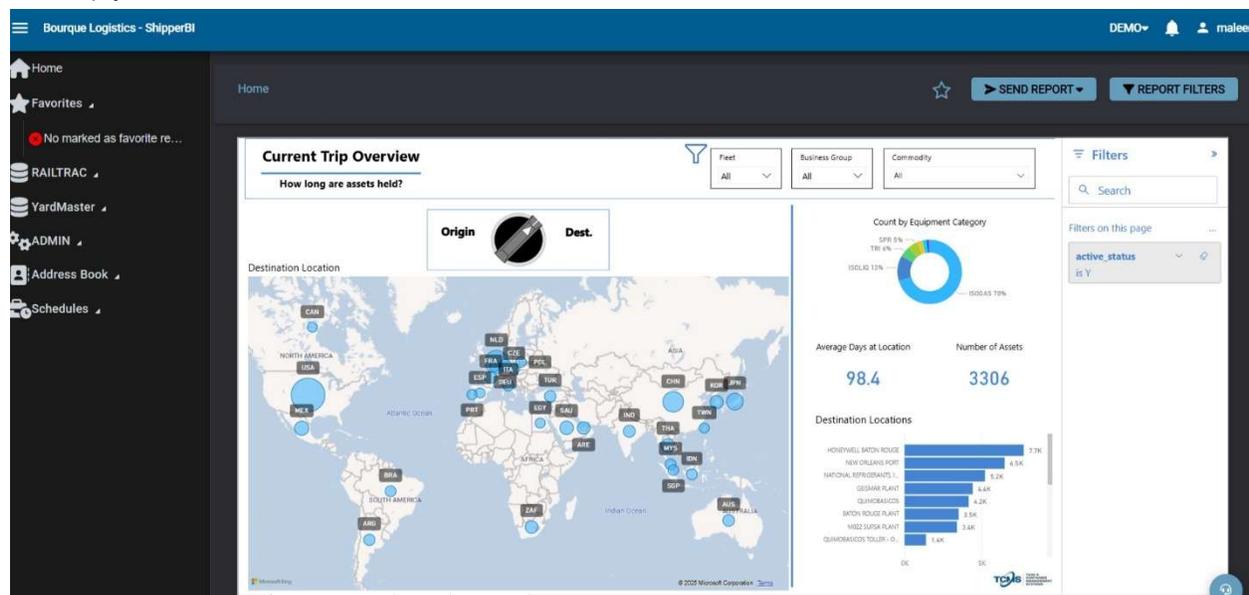
REPORT FILTERS

APPLYING AND SAVING FILTERS

- Reports may contain multiple pages, each with various filtering options.
- Users can apply filters to tailor the report as needed.
- After selecting the desired filters, a Save Filter option is available.
- A name must be provided to save the filter. The system will not allow saving a filter without a name.
- Once saved, the filter will appear in the saved filters panel for easy reuse.
- The system does not allow saving multiple filters with the same name.
- Upon successful saving, a confirmation message will appear.

PHASE II

FILTER MANAGEMENT

In addition to applying and saving filters, users can manage filters through various actions, including sharing, editing, duplicating, and deleting.
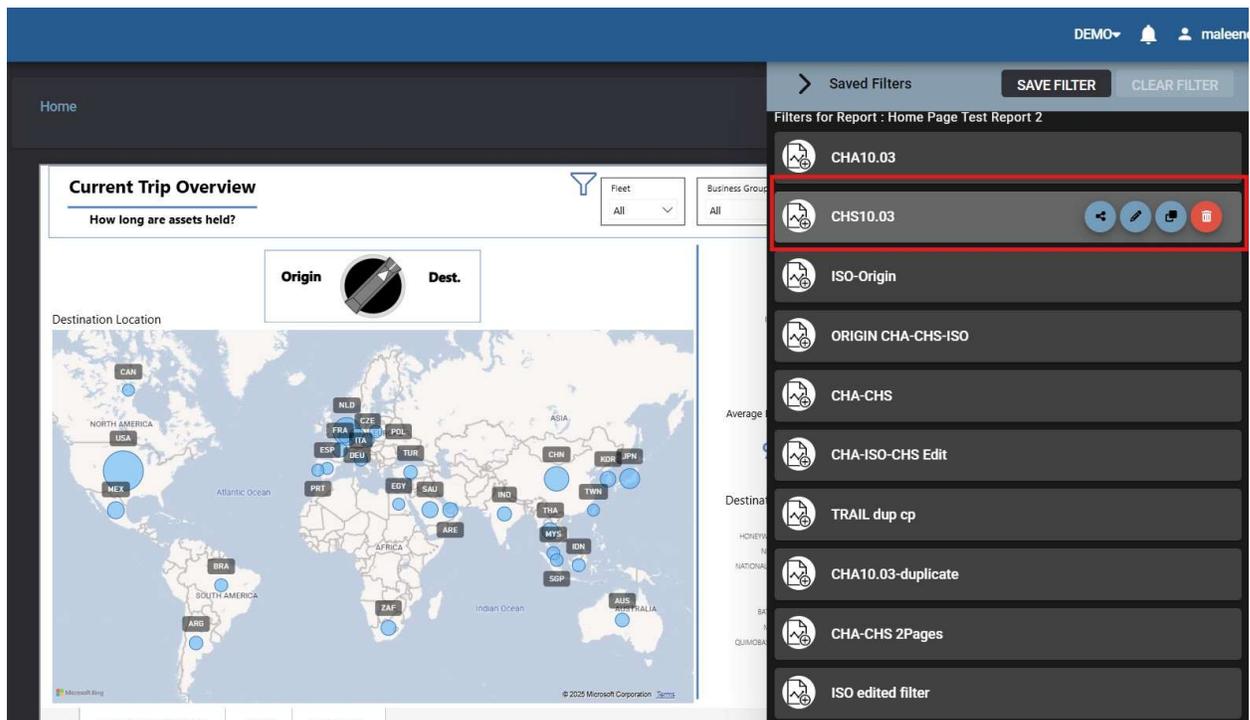
- **Sharing Filters**
  - ○ Saved filters can be shared with other users who have access to the same workspace. To share a filter:
   - ▪ Navigate to the desired filter in the filter panel.
    - ▪ Click the Share button.
    - ▪ The filter name will be automatically filled by default.
    - ▪ Select one or more users from the dropdown. Only users associated with the current workspace will be displayed.
    - ▪ Once shared, the selected users will see the shared filter in their panel, labeled with the name of the user who shared it.
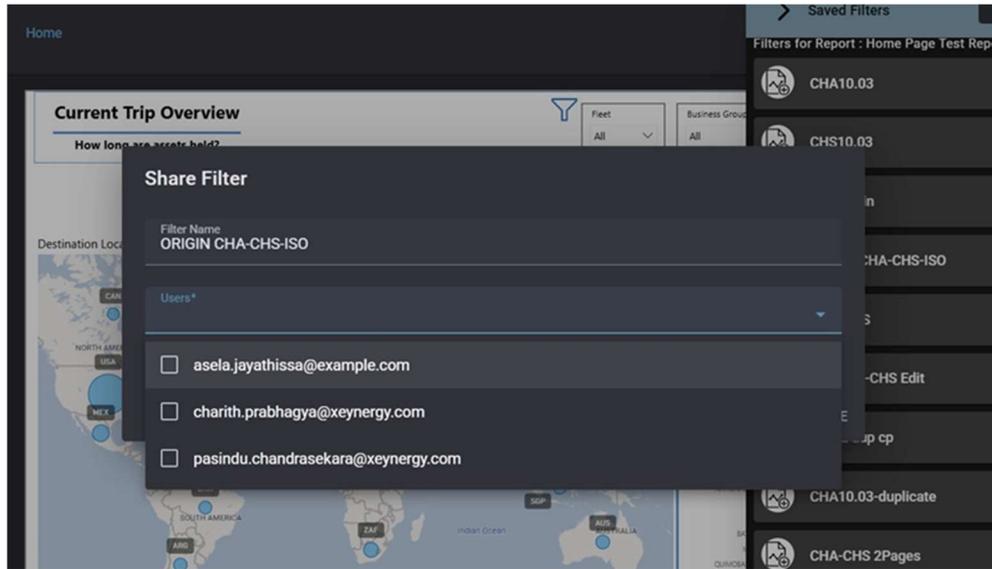
- **Editing Filters**
  - ○ Existing filters can be modified by:
    - ▪ Selecting the filter.
    - ▪ Updating the filter criteria.
    - ▪ Click the Update button to save changes.
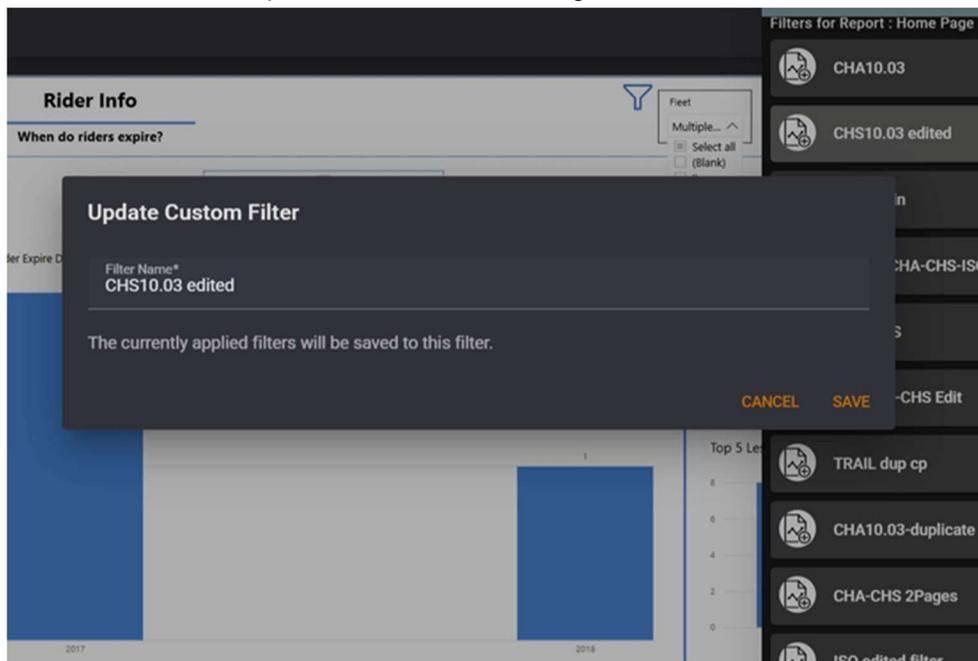
- **Duplicating Filters**
  - Users can duplicate a filter to create a new version with similar settings.
  - A new name must be provided for the duplicated filter, as the system does not allow saving filters with duplicate names.
- **Deleting Filters**
  - Any saved filter can be deleted by any user.
  - Once deleted, the filter will no longer appear in the filter panel.
- **Clearing Filters**
  - The Clear Filter option resets the report view to its default state, removing any applied filter settings.
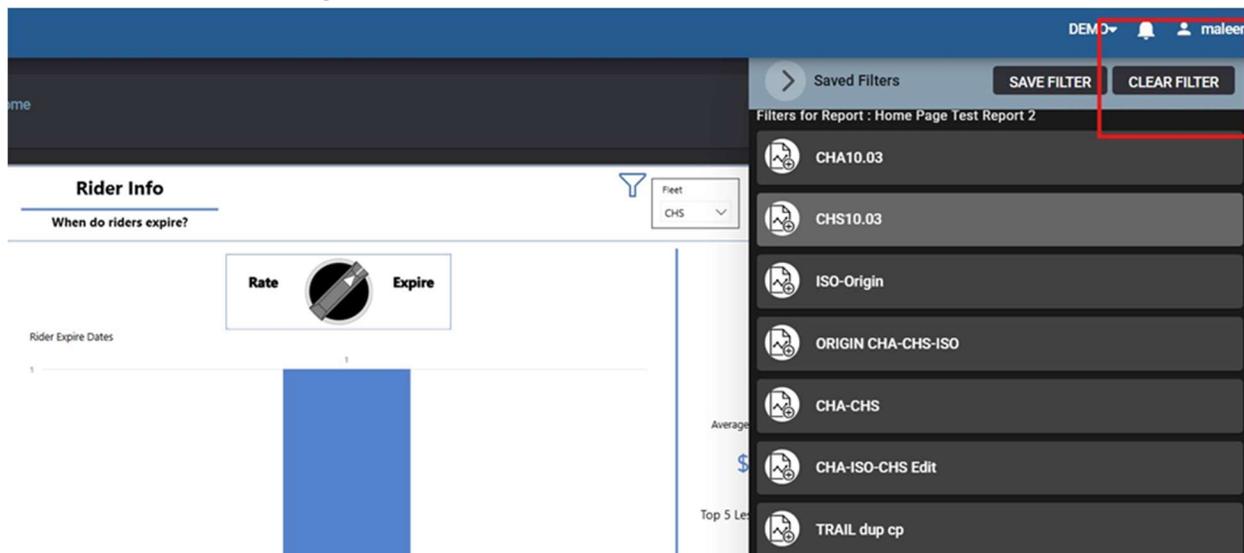
SUPPORT EMAIL

The Support Email feature allows users to submit clarification requests related to a specific report.

- **Form Details**
  - The form displays the following fields, which are automatically filled based on the current report and cannot be edited:
    - Username
    - Customer Name, which refers to the current workspace
    - Report Name, which refers to the report currently open
- **Input Fields**
  - The title is required and acts as the subject of the support request.
  - The message is optional and can be used to describe the issue or provide clarification in more detail.

- **Attachment Options**
  - A maximum of three attachments can be added.
  - Supported file types include JPEG, JPG, PNG, and GIF.
  - Attachments can be removed before submitting the form.

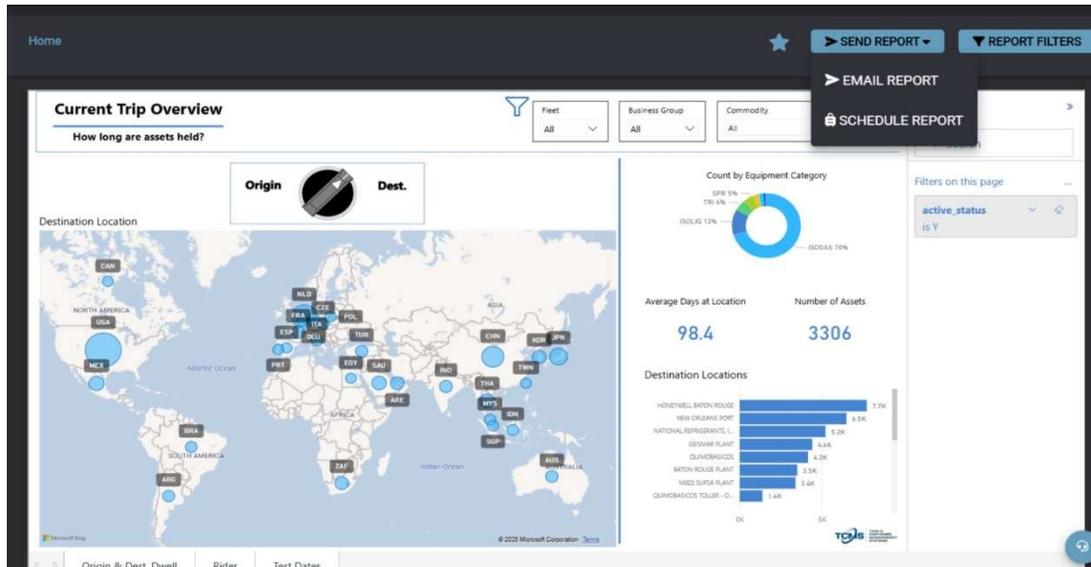The recipient's email address is not shown to the user.

After entering the required information and adding any optional attachments, the support email can be submitted.
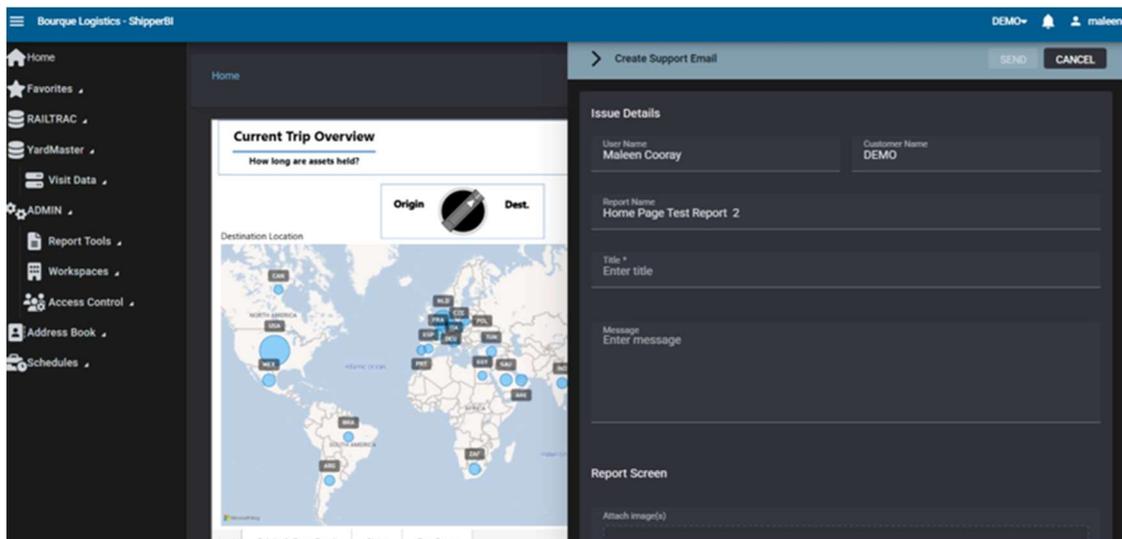
SEND REPORTS

Users can send reports through email using the Send Report option. This feature provides two actions:

- Email Reports
- Schedule reports

EMAIL REPORTS

To send a report without scheduling, the following fields must be completed:

- **Recipient Name**
  - This is a required field. A list of saved contacts from the user's address book is shown by default. It is also possible to enter an email address that is not saved in the address book. The report can also be sent to multiple recipients.
- **Subject**
  - The subject is automatically filled with the name of the currently open report. The subject can be changed before sending the report.
- **Message**
  - A message can be added along with the report.
- **Add report filter(s) & pages(s)**
  - Users must first select an appropriate filter that the user wants to share from the dropdown, then the user needs to select the page suitable with the selected filter.
  - The drop-down menu displays all available pages, including those hidden within the ShipperBI interface.
  - Selecting at least one page is required to proceed.
  - An option to remove attachments before sending the report is also provided.
  - If the same filter and report page is selected more than once, the system will notify the user and prevent duplication.
- **Attachment Format**
  - The Email can be sent as a PDF or a PowerPoint file.
  - After entering all required details, the report can be sent by email immediately.
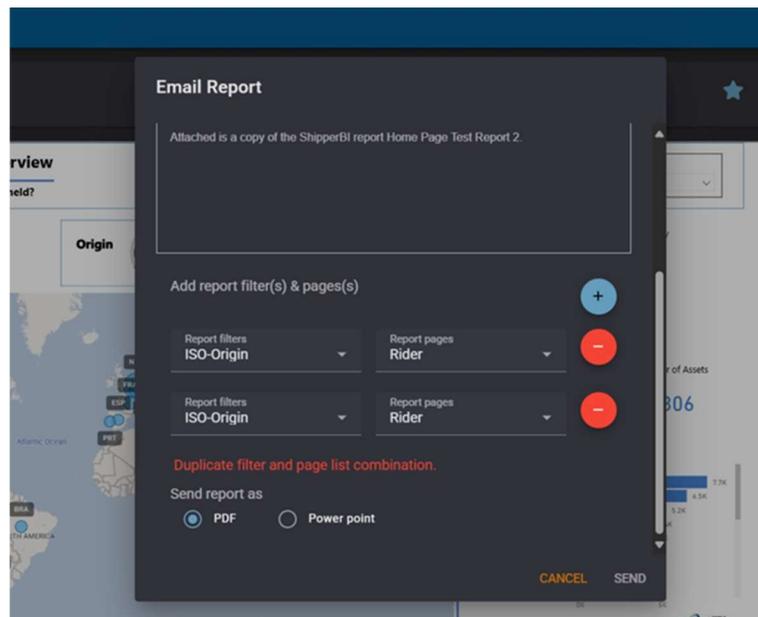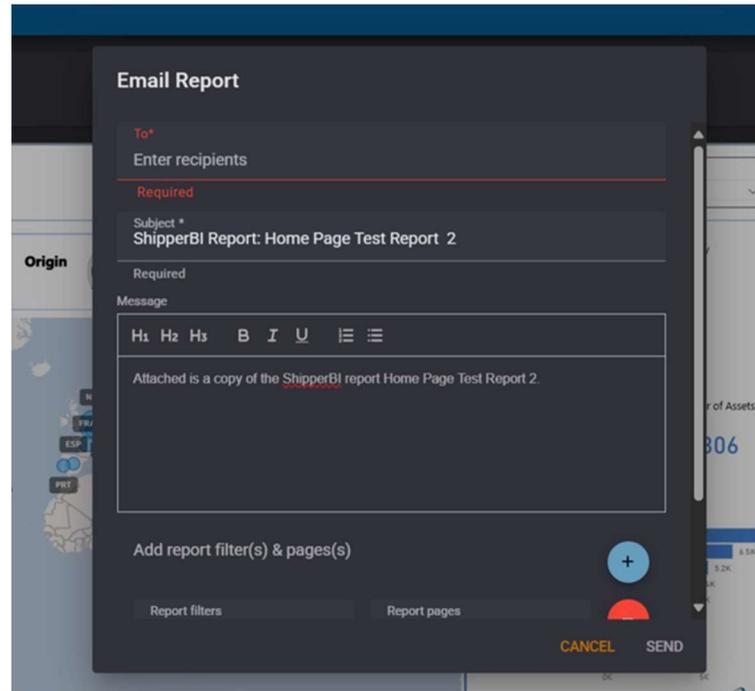
SCHEDULE REPORTS

- **Creating a New Schedule**

- o Normal users can only schedule a report directly from an open report and do not have access to create schedules from the main scheduler list. When scheduling through a report, the report selection step is skipped, as the currently opened report is automatically included in the field.
  - Step 01 - Name and Reports
  - Step 02 - Set Name & Recurrence
    - Format 01 - Recurrence Format options
    - Format 02 - CRON Format
  - Step 03 - Set dates
  - Step 04 - Summary
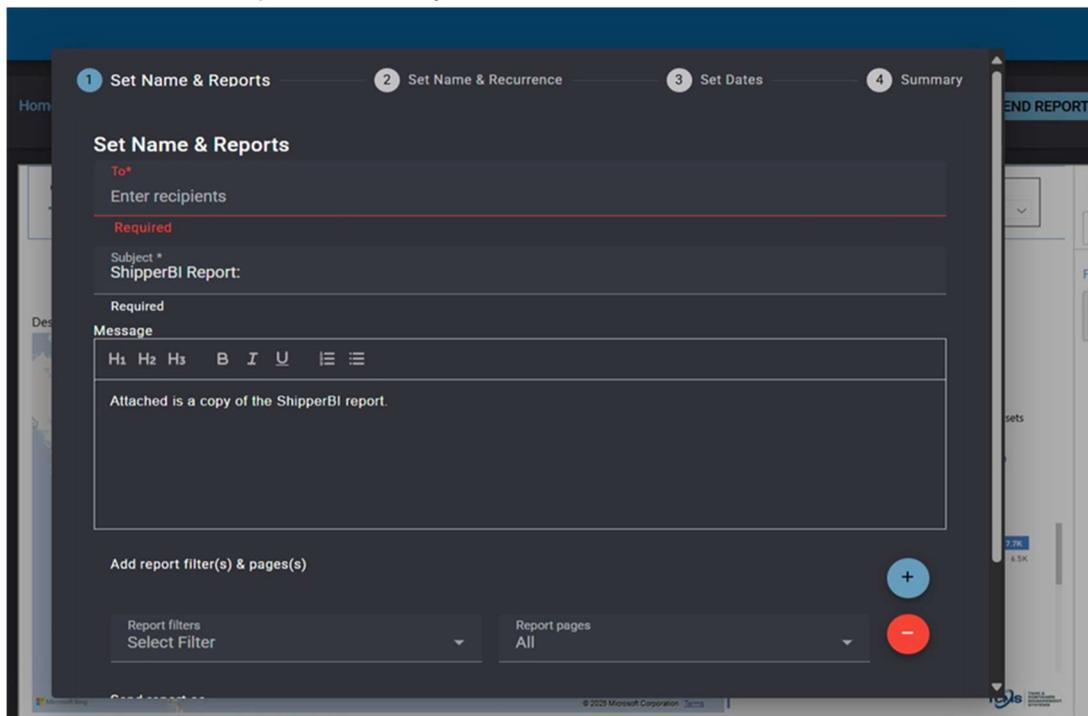
ADDRESS BOOK

CONTACT LIST

- **Searching Contacts**
  - o A search bar is provided to find existing contacts.
  - o Search can be performed by username, email address, or full name.
- **Adding a New Contact**
  - o Select the Add button to open the contact creation form.
  - o Enter the required information:

- First Name

- Last Name

- Email Address

- These three fields are mandatory. The system will display a prompt if any are missing.

  o Optional fields can be filled out as needed.
  o Assign the contact to one or more existing groups, or:
  o Create a new group by entering a Group Name (required).
  o After saving, the contact will appear in the Contact List, sorted in alphabetical order.

- **Managing Contacts**
  o Edit: Update existing contact details or group assignments.
  o Delete: Remove a contact from the list.

- **System Notifications**
  o The system will display confirmation messages after adding, editing, or deleting a contact.
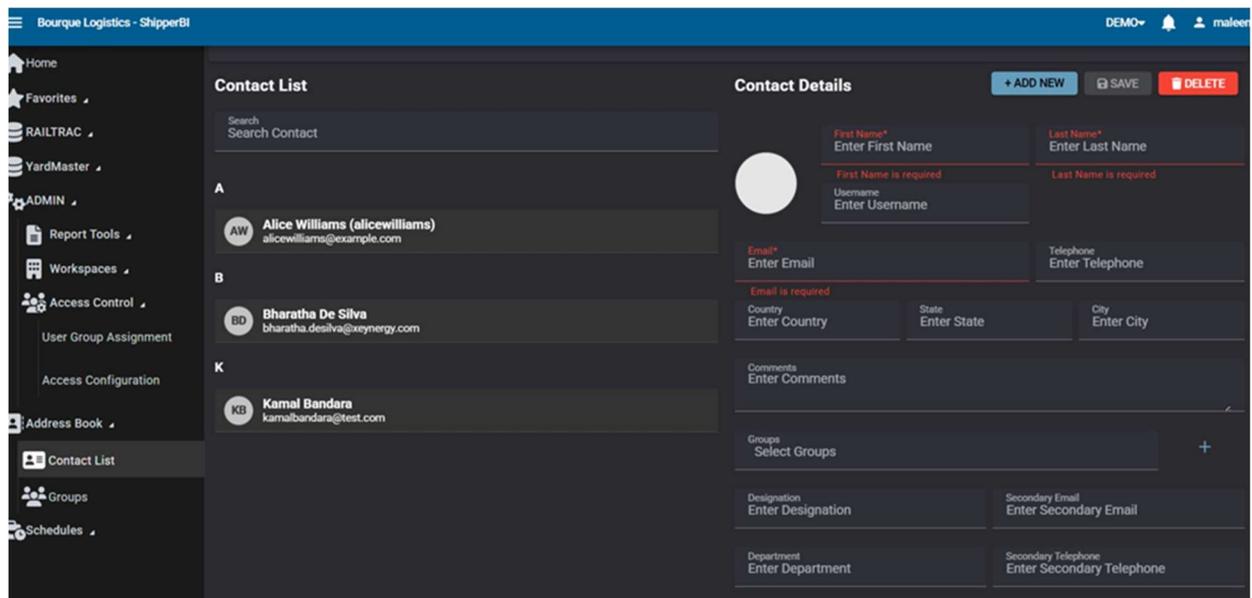
GROUPS

- **Searching Groups**
  o A search bar is available to locate existing groups by group name.

- **Creating a New Group**

- To create a new group, select the Add New option. This opens a form to enter the required information.
- Group Name is a mandatory field.
- Contacts can be added to the group by selecting from a dropdown list, which displays all contacts saved in the Contact List.
- **Viewing and Managing Groups**
  - A list of all created groups is displayed on the left side, along with the contacts assigned to each group.
- **Editing or Deleting Groups**
  - Contacts can be updated within a group using the Edit option.
  - Groups can also be deleted if no longer needed.
- After creating, editing, or deleting a group, the system displays a success message to confirm the action.
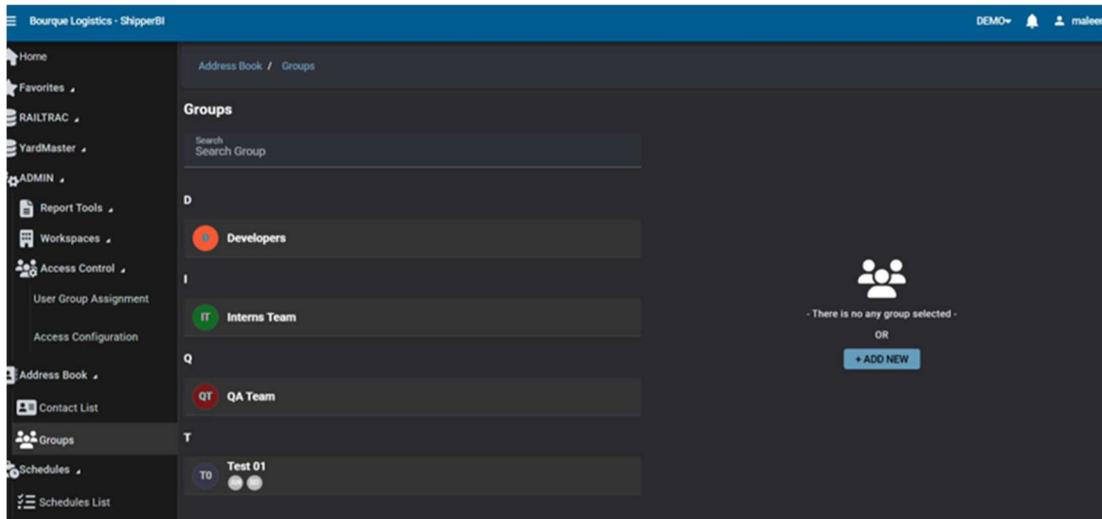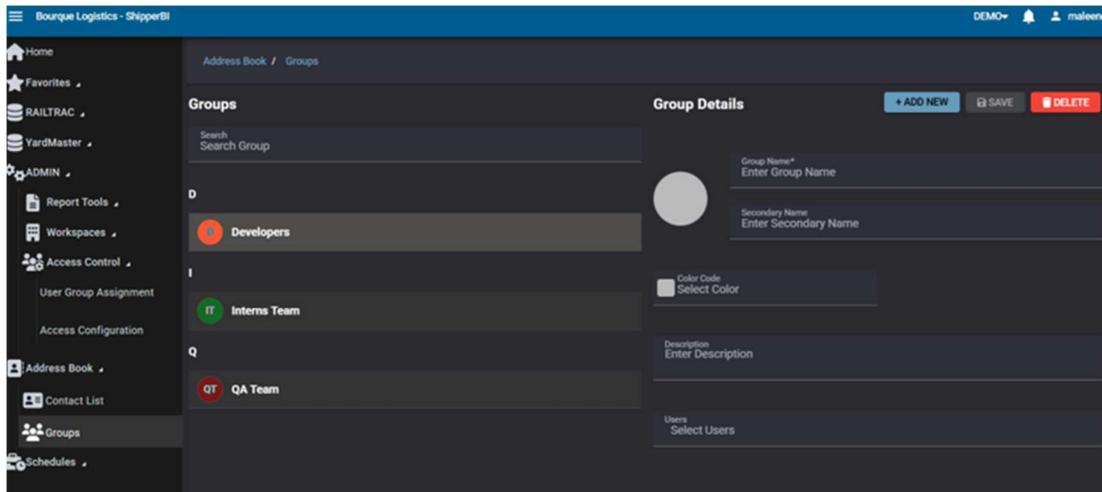
SCHEDULES

SCHEDULES LIST

The Schedule List section displays all email schedules associated with the currently logged-in workspace. Admin users can view all schedules created within the workspace, including those created by other users. However, normal users are only permitted to edit the schedules they have personally created.

The Create New button is available exclusively to admin users. This option is not accessible to normal users.

- **Creating a New Schedule**
  - To create a new schedule, select the Create New button. This opens a modal window where the user must first select the ShipperBI Email Schedule option.

- **Step 1: Set Name and Reports**
  - Select Report: A drop-down displays all reports associated with the current workspace.
  - Select Recipients: A drop-down displays all contacts from the address book that are linked to the current workspace. Multiple recipients can be selected.
  - Both Report and Recipients are required fields.
  - Add Email Details
    - Subject: Optional field where the user can enter a subject for the scheduled email.
    - Message: A custom message can be added.
  - Add Attachments
    - Users can select report filters related to the chosen report from a drop-down list. After selecting filters, users can choose the corresponding report pages. Attachments can be sent in PDF or PowerPoint format.
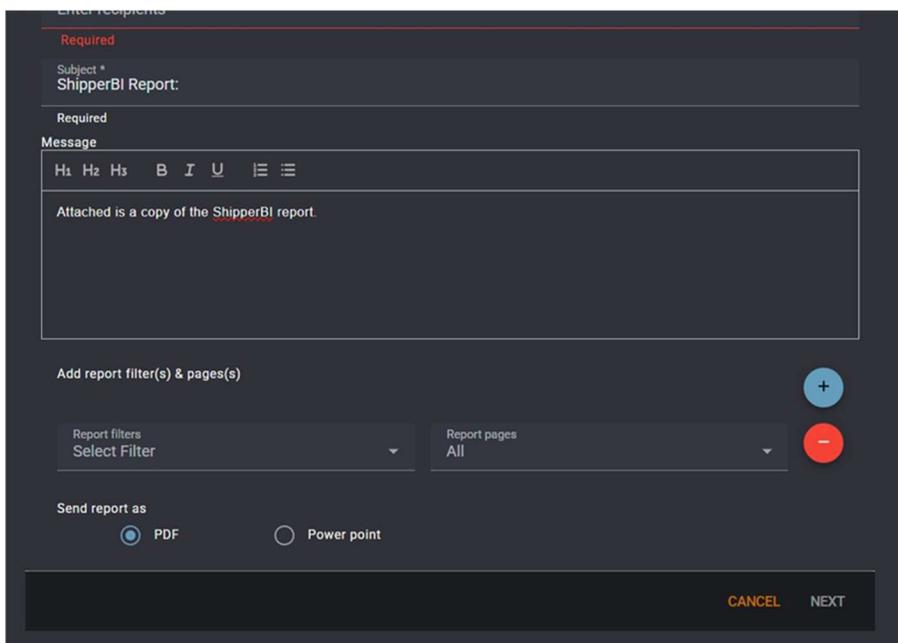
- **Step 02: Set Name & Recurrence**
  - o In this step, the schedule name and recurrence pattern must be defined.

- o Schedule Name: A name must be entered for the schedule. This is a required field and will be used to identify the schedule in the Schedule List.
- o Recurrence Type: The user must choose either **Recurrence Format** or **CRON Format** to proceed.
- **Recurrence Format Options**
- **HOURLY**
  - o Enter the number of hours between each email trigger.
  - o Define the Start Time and End Time (in hours).
  - o Example: Hours: 2 | Start Time: 10 | End Time: 15
  - o (This configuration will send an email every 2 hours between 10:00 AM and 3:59 PM.)
- **DAILY**
  - o Select the specific date and time for the email to be sent each day.
- **WEEKLY**
  - o Choose either Every Day or select specific days of the week.
  - o Define the time the email should be sent on the selected days.
- **MONTHLY**
  - o Two configuration options are available:
    - ▪ Days: Enter the Day of the Month, how often, months, and the Time.
    - ▪ Statement: Choose the Occurrence (e.g., first, second), Day (e.g., Monday), Months, and the Time.

- **CRON Format**
  - Schedules can also be defined using the Unix CRON format, allowing for more advanced and flexible scheduling options.
- **Example CRON Expressions:**
  - Every minute, every hour, every day: **0 * * * * ? -**
  - Every 3 hours, every day, starting from the 1st of the month: **0 0 */3 * * ?** 3. At 09:00, only on Monday: **0 0 9 ? * 2 ***
- **Special Characters:**
  - **[*]** Represents any value
  - **[,]** Used to separate multiple values
  - **[-]** Defines a range of values
  - **[/]** Specifies step values
- As CRON expressions are entered, the system will display the meaning of each character beneath the input field to assist with accurate configuration.
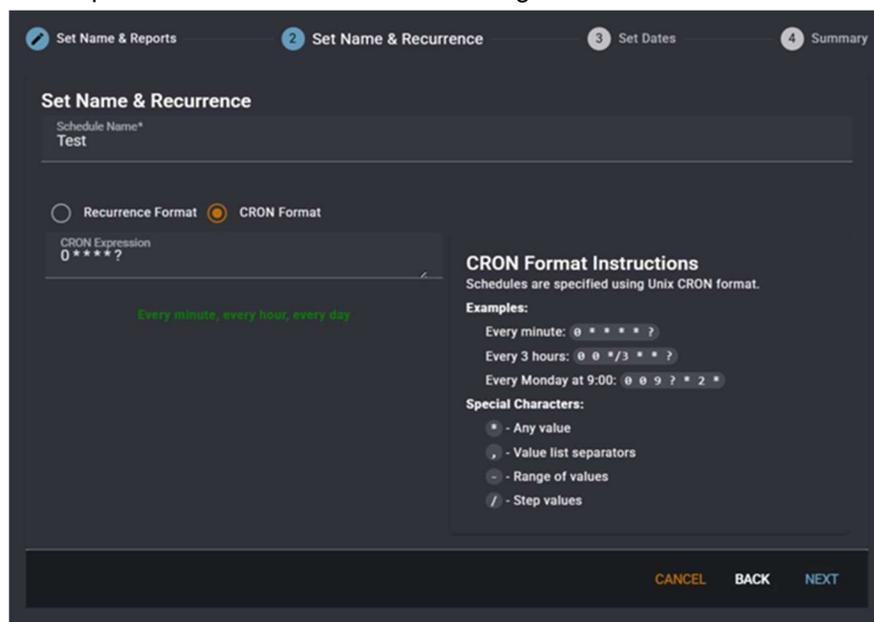
- **Step 03: Set Dates**
  - In this step, the Start Date and End Date for the schedule must be defined. These fields are mandatory.
    - The Start Date specifies when the schedule should begin.
    - The End Date defines when the schedule should stop.
  - The system does not allow the selection of past dates for either field.
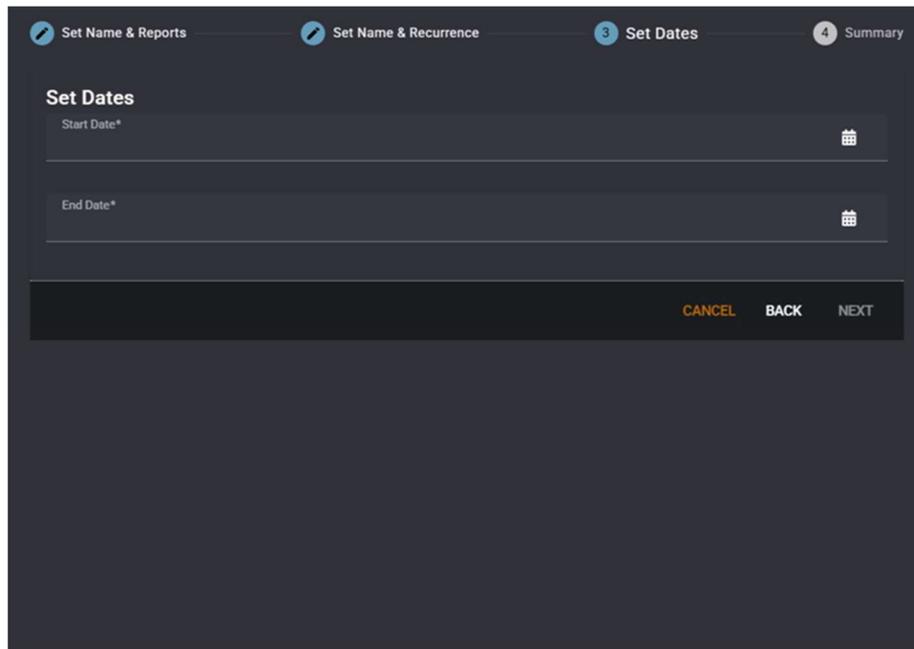
- **Step 04: Summary**
  - As the final step, the system will display a summary of all the schedule details entered.
    - This summary allows a final review before saving.
    - If any changes are needed, the user can navigate back and adjust. Once all required information is confirmed and completed, the schedule will be saved and listed in the Schedule List.

SCHEDULE LIST GRID COMPONENTS

- **Action Options per Status**
- **Active Schedules**
  - Job Status: Active
  - Actions: Pause, Execute, History, Edit, Delete
- **Paused Schedules**
  - Job Status: Paused
  - Last Executed Status: Waiting / Success
  - Actions: Resume, Execute, History, Edit, Delete **Inactive Schedules**
- Job Status: Inactive
- Last Executed Status: Success
- Actions: Activate, Execute (disabled), History, Edit, Delete
- To reactivate, update the schedule's Date and Time settings.
- **Additional Action Features**
  - History: Users can view the full history of each schedule individually.
  - Edit: All schedule details, including recurrence and recipients, can be modified through the Edit option.
  - Delete: Schedules can be permanently removed.

o   Export: By selecting one or multiple schedules via the checkbox in the grid, users can export schedule details to Excel. If multiple schedules are selected, a confirmation prompt displays the selected list before export.

- **Sorting and Filtering**
  - o   All columns except actions support sorting.
  - o   Job Status includes a filter drop-down for Active, Paused, and Inactive statuses.
  - o   End Date includes a range-based filter.
  - o   Customer and Schedule Name fields offer searchable dropdowns.
- **Notifications**
  - o   The system provides confirmation messages for all successful and failed actions, including edits, activations, deletions, and exports.