



## **ShipperBI™ Release Notes**

**PHASE II**  
**BOURQUE LOGISTICS**  
**JULY 2025**

### **Confidentiality Notice**

This document contains confidential information and trade secrets of Bourque Logistics, Inc. It is intended solely for the use of authorized Bourque licensees. Unauthorized use, distribution, or disclosure is strictly prohibited.



# SHIPPERBI™

## PHASE II

### Table of Contents

Enhancements.....	2
Favorites .....	2
Report Filters.....	2
Applying and Saving Filters.....	2
Filter Management.....	4
Support Email.....	6
Send Reports .....	7
Email Reports .....	8
Schedule Reports .....	9
Address Book.....	10
Contact List.....	10
Groups.....	11
Schedules .....	13
Schedules List .....	13
Schedule List Grid Components.....	20

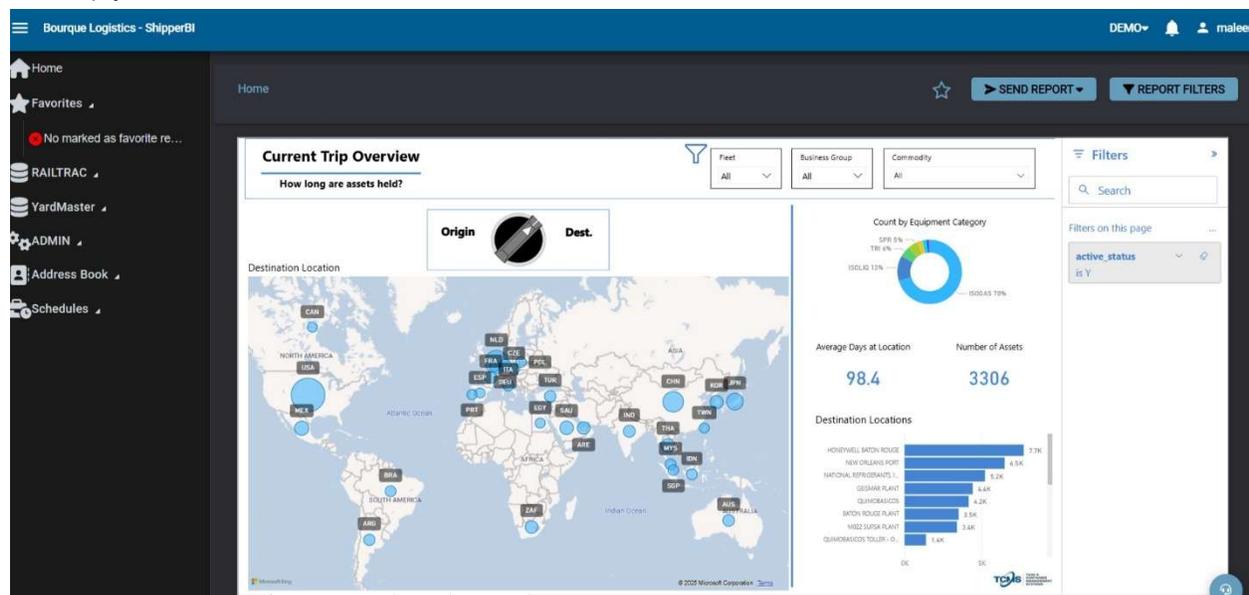
## Overview

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.

**Current Trip Overview**  
How long are assets held?

**Filters**

- Fleet: All
- Business Group: All
- Commodity: All

**Count by Equipment Category**

SPR	5%
TRF	6%
ISOLIG	13%
ISOGAS	79%

**Average Days at Location**: 98.4  
**Number of Assets**: 3306

**Destination Locations**

HONEYWELL BATON ROUGE	2.7K
NEW ORLEANS PORT	4.5K
NATIONAL REFRIGERANTS I.	5.2K
GESMAR PLANT	4.4K
QUINORAGIOS	4.2K
BATON ROUGE PLANT	3.5K
MOSE SUPSA PLANT	3.4K
QUINORAGIOS TOLLER - D.	1.4K

**Current Trip Overview**

**Filters**

- Fleet: ISO
- Business Group: 401A

**Create Custom Filter**

Filter Name\*  
Ex. Business report - November 2021

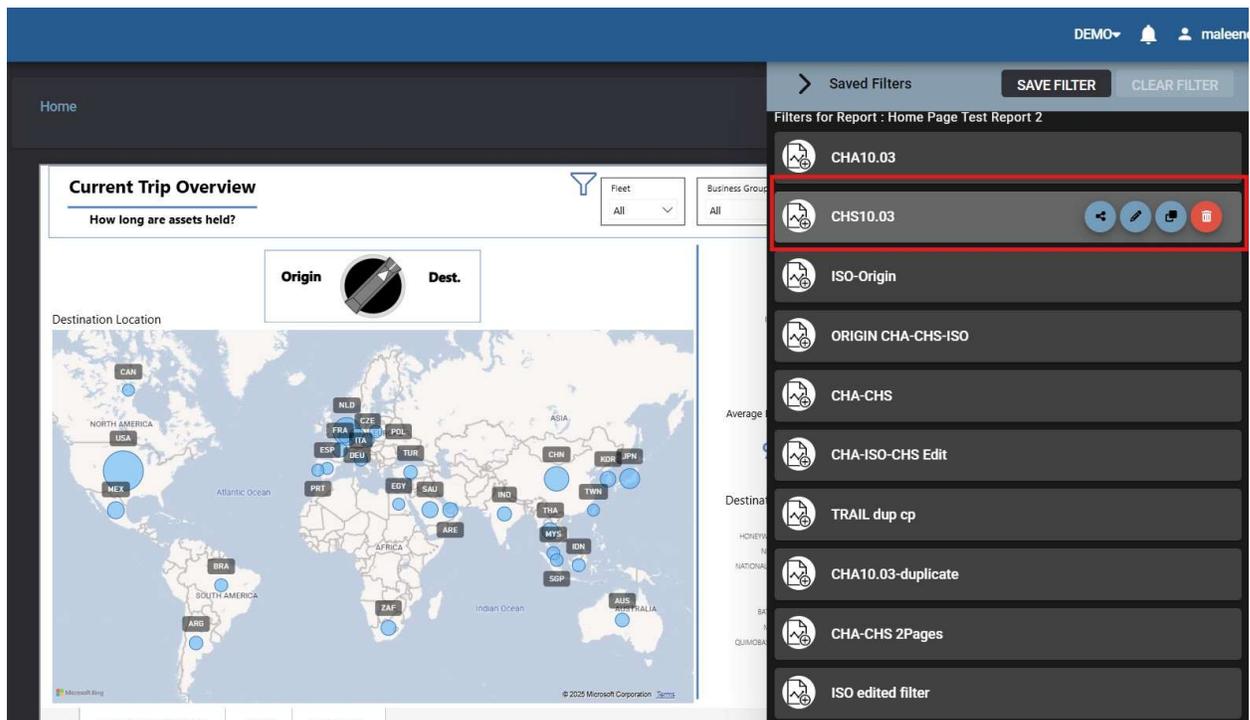
Filter Name is required

**Saved Filters**

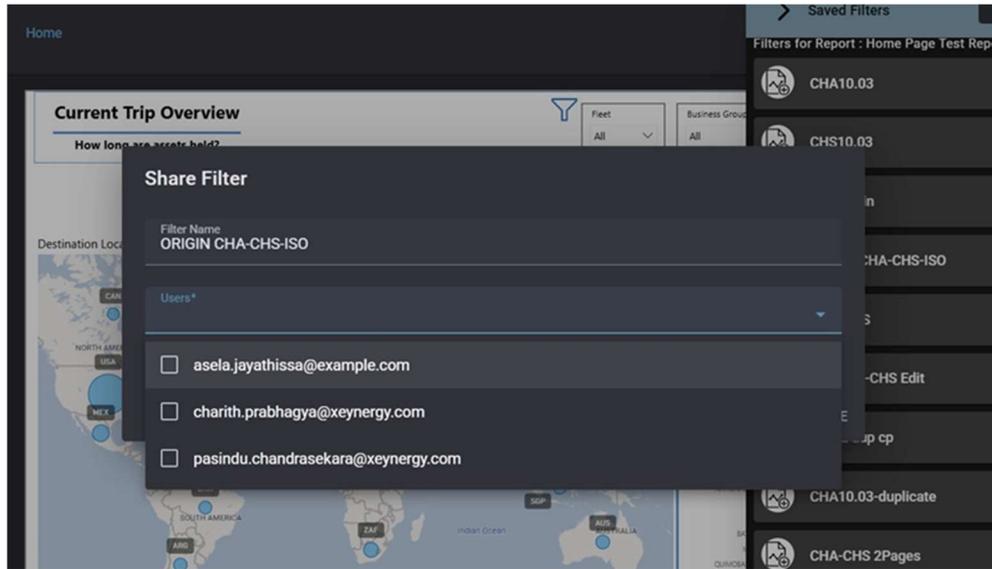
- filter2-25/1/1
- ISO-CHS 2Pages
- 2Pages Duplicate
- IS
- uplicate
- Report-Origin & Dest. Dwell - ISO - NEW Filter / : maleenc
- CHATRI-SPRD
- CHA-SPRD  
Shared by : maleenc
- 1- 1233, 2-CHA
- 1233ZD - Origin and Dest Dwell Dup

### FILTER MANAGEMENT

In addition to applying and saving filters, users can manage filters through various actions, including sharing, editing, duplicating, and deleting.

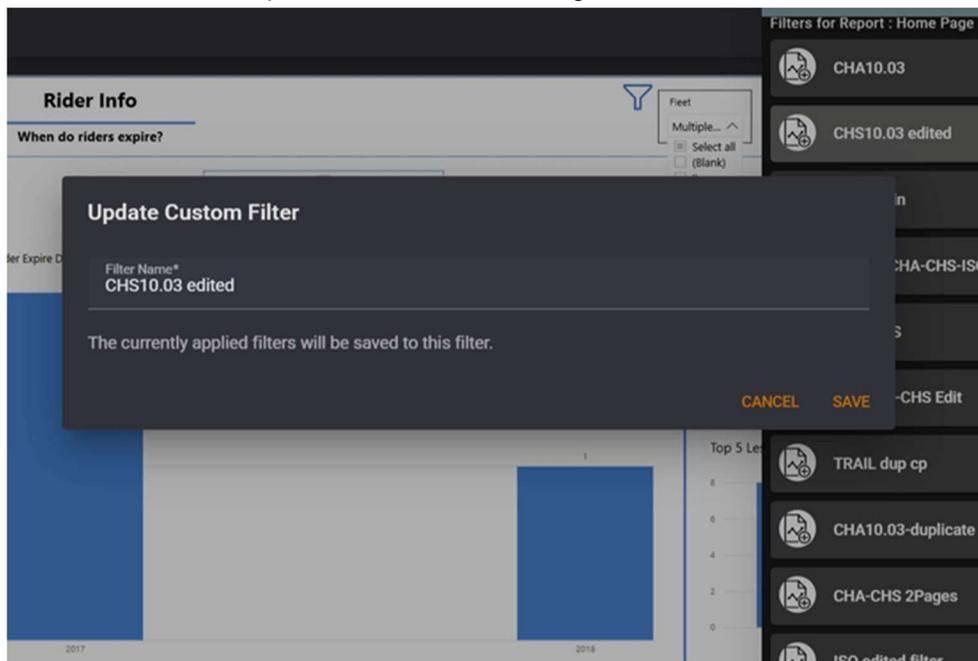


- **Sharing Filters**
  - Saved filters can be shared with other users who have access to the same workspace. To share a filter:
    - Navigate to the desired filter in the filter panel.
    - Click the Share button.
    - The filter name will be automatically filled by default.
    - Select one or more 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.

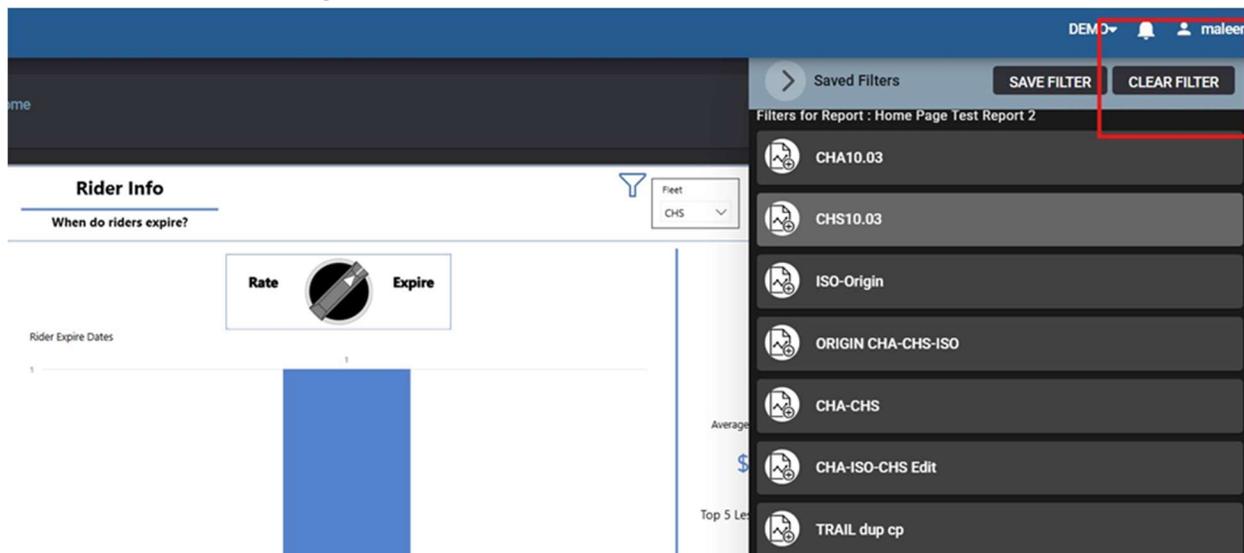


- **Editing Filters**

- 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.

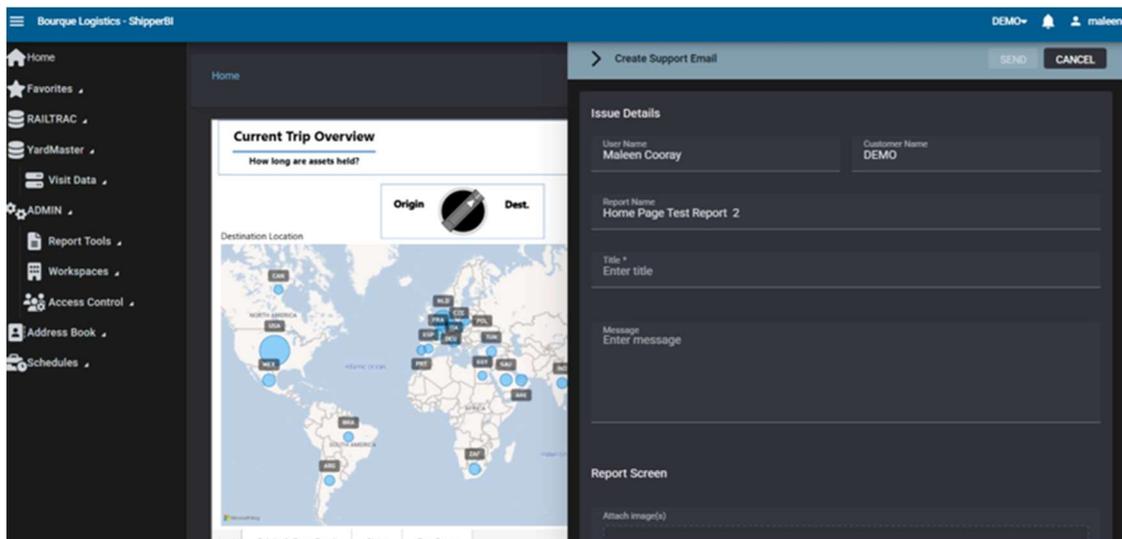
- **Form Details**
  - The form displays the following fields, which are automatically filled based on the current report and cannot be edited:
    - Username
    - Customer Name, which refers to the current workspace
    - Report Name, which refers to the report currently open
- **Input Fields**
  - 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.

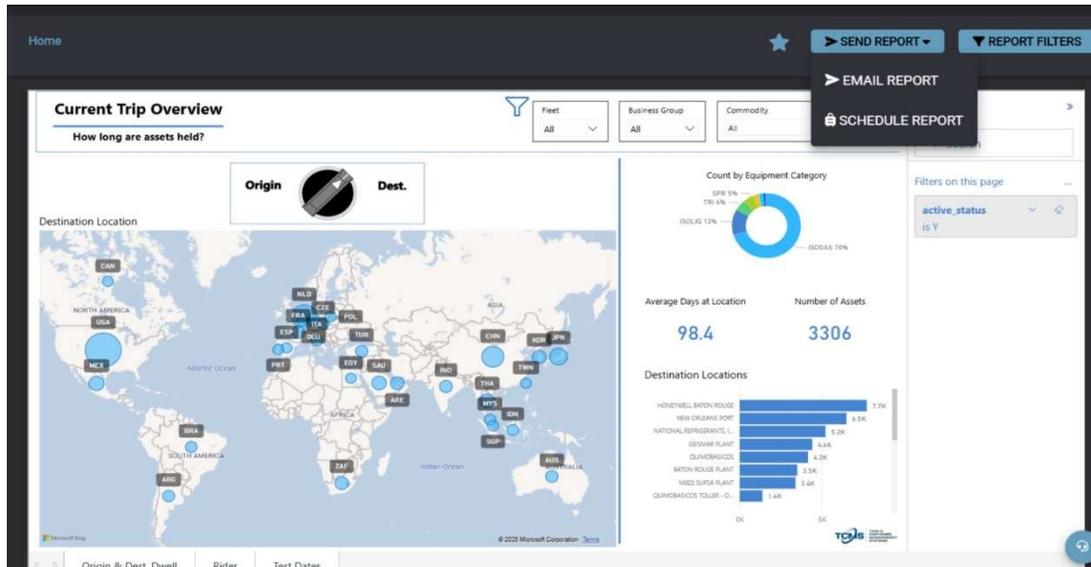
After entering the required information and adding any optional attachments, the support email can be submitted.



## SEND REPORTS

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

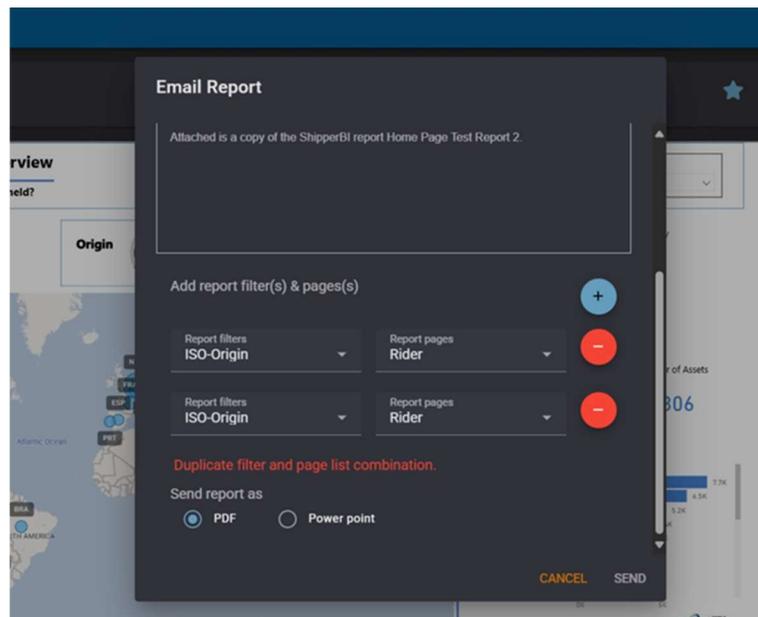
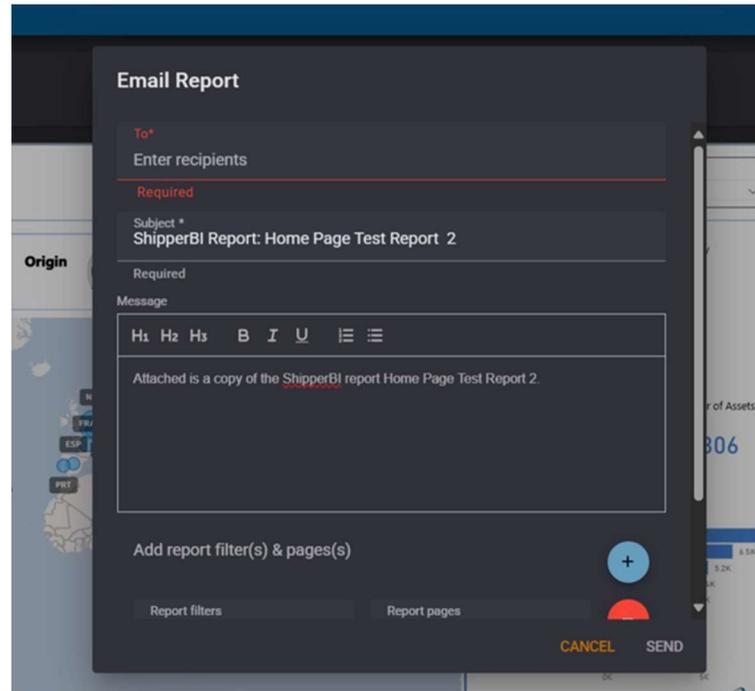
- Email Reports
- Schedule reports



### EMAIL REPORTS

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

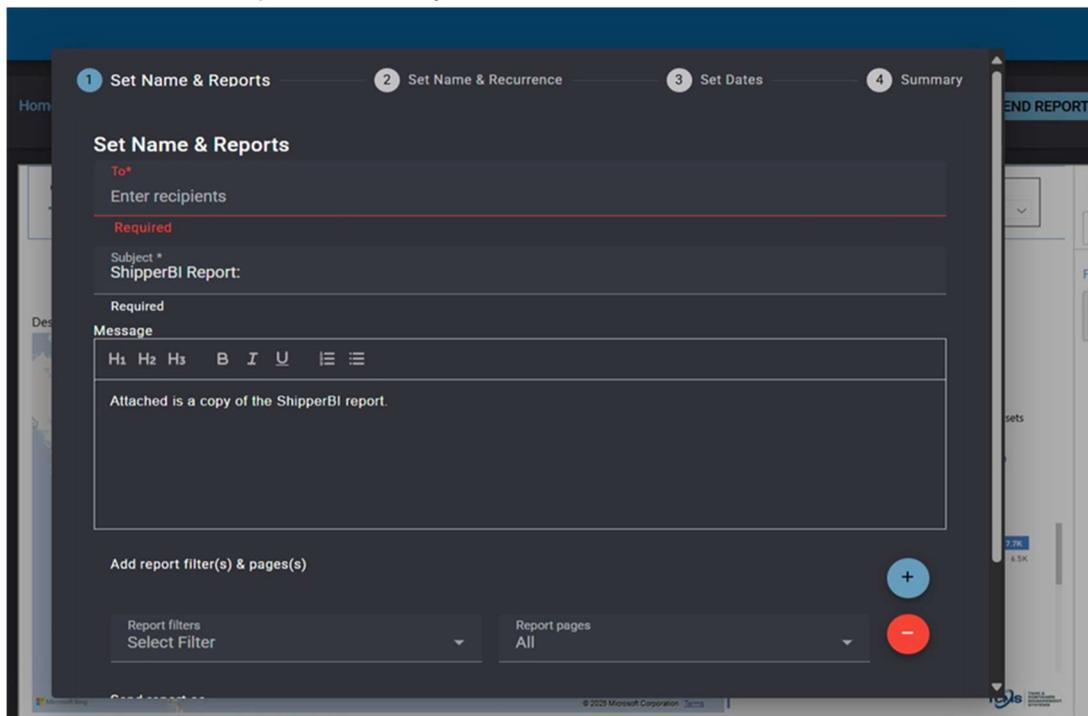
- **Recipient Name**
  - This is a required field. A list of saved contacts from the user's address book is shown by default. It is also possible to enter an email address that is not saved in the address book. The report can also be sent to multiple recipients.
- **Subject**
  - The subject is automatically 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**

- 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

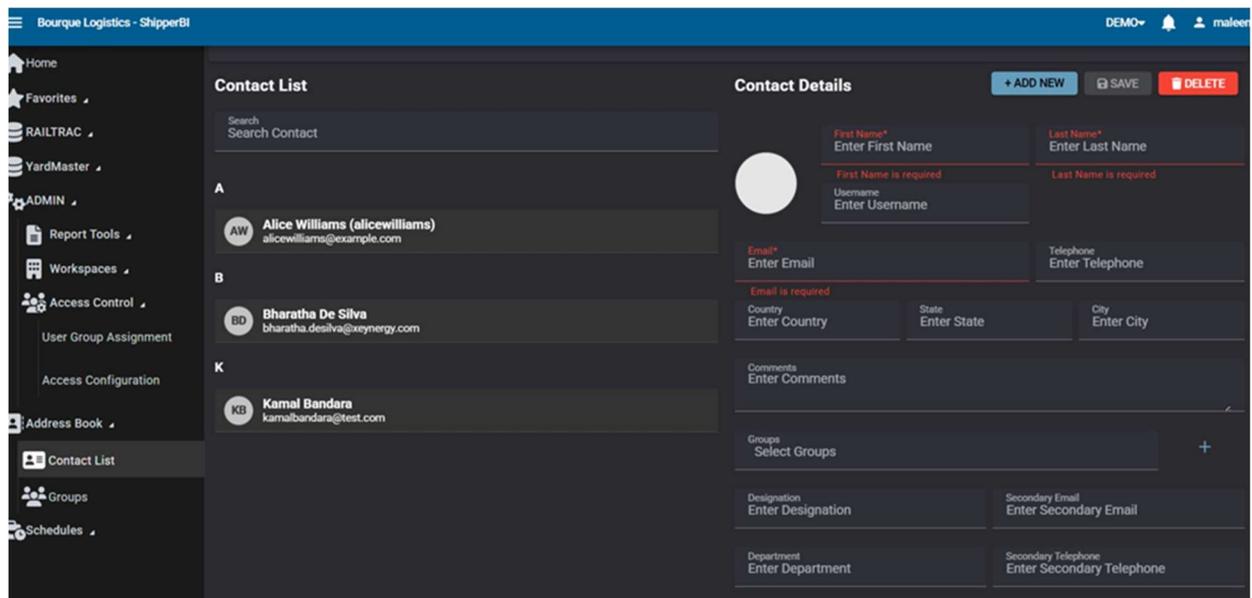


## ADDRESS BOOK

### CONTACT LIST

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

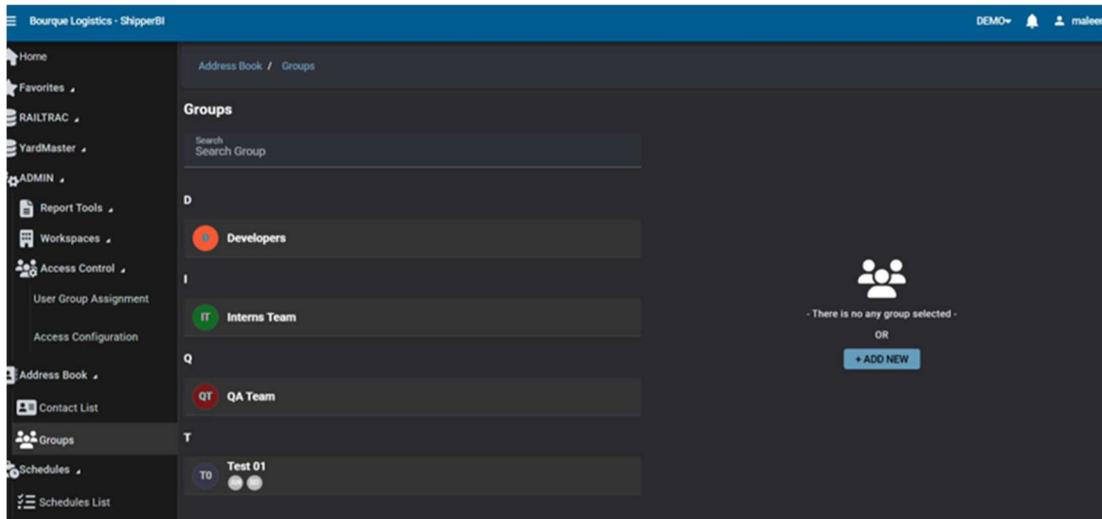
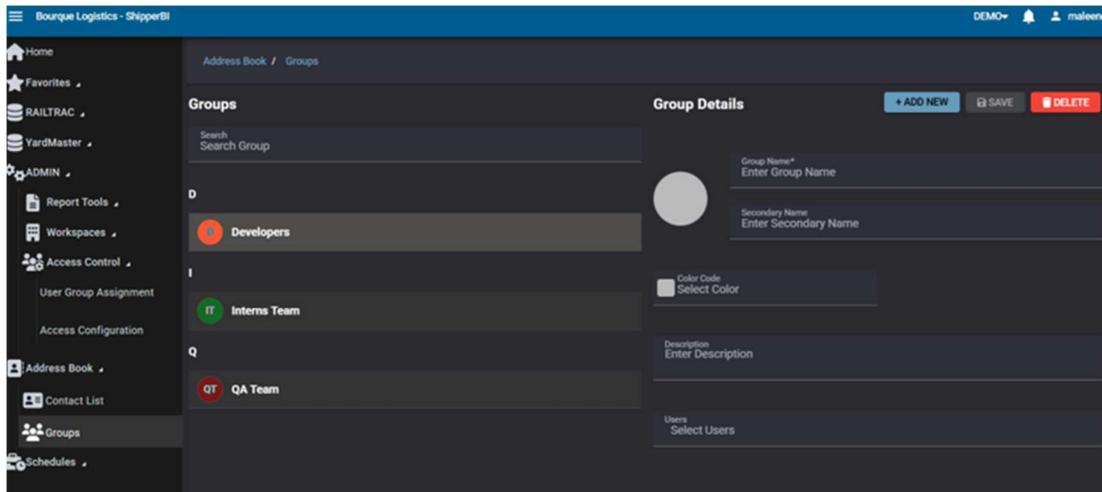
- First Name
- Last Name
- Email Address
- These three fields are mandatory. The system will display a prompt if any are missing.
- Optional fields can be filled out as needed.
- Assign the contact to one or more existing groups, or:
- Create a new group by entering a Group Name (required).
- After saving, the contact will appear in the Contact List, sorted in alphabetical order.
- **Managing Contacts**
  - Edit: Update existing contact details or group assignments.
  - Delete: Remove a contact from the list.
- **System Notifications**
  - The system will display confirmation messages after adding, editing, or deleting a contact.



## GROUPS

- **Searching Groups**
  - 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.



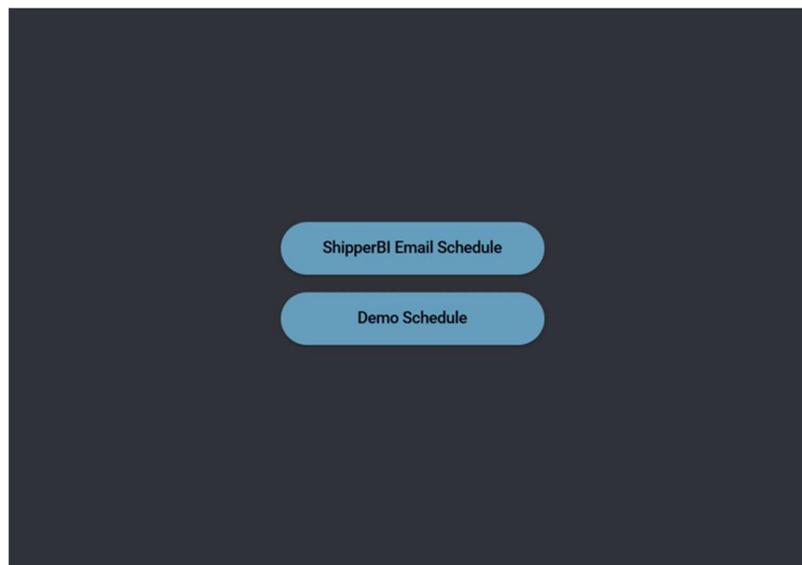
## SCHEDULES

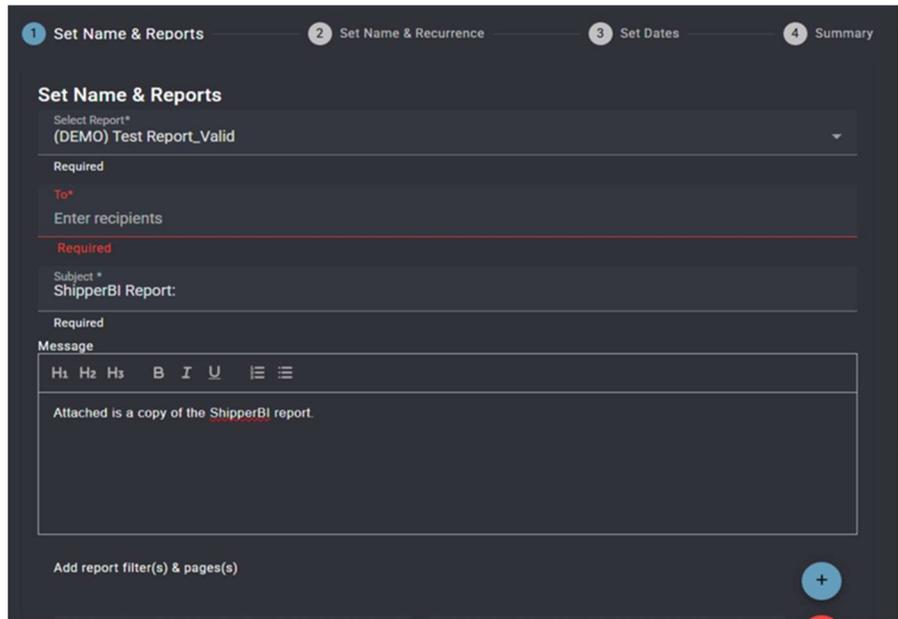
### SCHEDULES LIST

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.





1 Set Name & Reports 2 Set Name & Recurrence 3 Set Dates 4 Summary

### Set Name & Reports

Select Report\*  
(DEMO) Test Report\_Valid

Required

To\*  
Enter recipients

Required

Subject \*  
ShipperBI Report:

Required

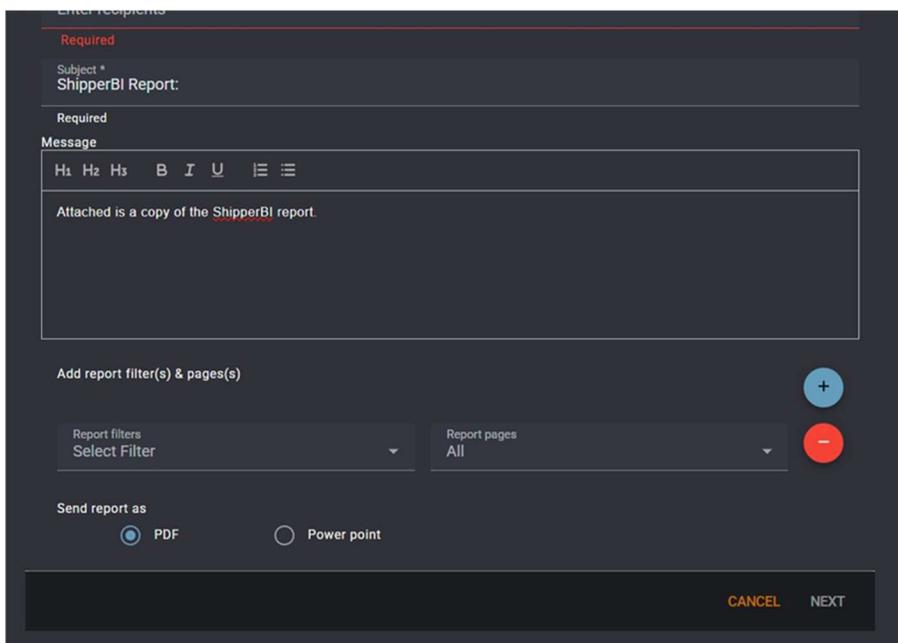
Message

H1 H2 H3 B I U |≡ ≡≡

Attached is a copy of the [ShipperBI](#) report.

Add report filter(s) & pages(s)

+



Enter recipients

Required

Subject \*  
ShipperBI Report:

Required

Message

H1 H2 H3 B I U |≡ ≡≡

Attached is a copy of the [ShipperBI](#) report.

Add report filter(s) & pages(s)

+

Report filters  
Select Filter

Report pages  
All

-

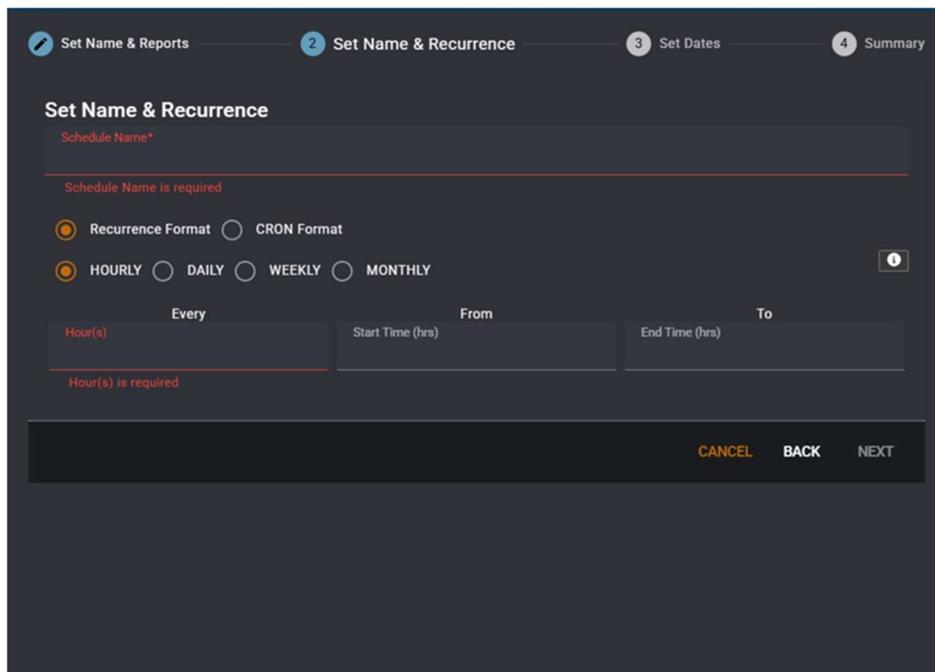
Send report as

PDF  Power point

CANCEL NEXT

- **Step 02: Set Name & Recurrence**
  - In this step, the schedule name and recurrence pattern must be defined.

- 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.
- Recurrence Type: The user must choose either **Recurrence Format** or **CRON Format** to proceed.
- **Recurrence Format Options**
- **HOURLY**
  - Enter the number of hours between each email trigger.
  - Define the Start Time and End Time (in hours).
  - Example: Hours: 2 | Start Time: 10 | End Time: 15
  - (This configuration will send an email every 2 hours between 10:00 AM and 3:59 PM.)
- **DAILY**
  - Select the specific date and time for the email to be sent each day.
- **WEEKLY**
  - Choose either Every Day or select specific days of the week.
  - Define the time the email should be sent on the selected days.
- **MONTHLY**
  - 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.



The screenshot shows a dark-themed configuration interface with a progress bar at the top containing four steps: 1. Set Name & Reports, 2. Set Name & Recurrence (active), 3. Set Dates, and 4. Summary. The main section is titled 'Set Name & Recurrence' and contains the following elements:

- A text input field for 'Schedule Name\*' with a red error message below it: 'Schedule Name is required'.
- Two radio button options: 'Recurrence Format' (selected) and 'CRON Format'.
- Four radio button options for frequency: 'HOURLY' (selected), 'DAILY', 'WEEKLY', and 'MONTHLY'. A help icon is visible to the right.
- Input fields for 'Every' (Hours), 'From' (Start Time (hrs)), and 'To' (End Time (hrs)). A red error message 'Hour(s) is required' is shown below the 'Every' field.
- At the bottom right, there are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

1 Set Name & Reports    2 Set Name & Recurrence    3 Set Dates    4 Summary

### Set Name & Recurrence

Schedule Name\*  
Test

Recurrence Format     CRON Format

HOURLY     DAILY     WEEKLY     MONTHLY

Every    At

Day(s)    Time of day

Day(s) is required

CANCEL    BACK    NEXT

1 Set Name & Reports    2 Set Name & Recurrence    3 Set Dates    4 Summary

### Set Name & Recurrence

Schedule Name\*  
Test

Recurrence Format     CRON Format

HOURLY     DAILY     WEEKLY     MONTHLY

Everyday    At

Select Days    Time of day

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

CANCEL    BACK    NEXT

1 Set Name & Reports    2 Set Name & Recurrence    3 Set Dates    4 Summary

### Set Name & Recurrence

Schedule Name\*  
Test

Recurrence Format     CRON Format

HOURLY     DAILY     WEEKLY     MONTHLY

Days     Statement

Day(s)    of Every    Month(s)    At    Time of day

Month(s) is required

- 1st day
- 2nd day
- 3rd day
- 4th day
- 5th day

CANCEL    BACK    NEXT

1 Set Name & Reports    2 Set Name & Recurrence    3 Set Dates    4 Summary

### Set Name & Recurrence

Schedule Name\*  
Test

Recurrence Format     CRON Format

HOURLY     DAILY     WEEKLY     MONTHLY

Days     Statement

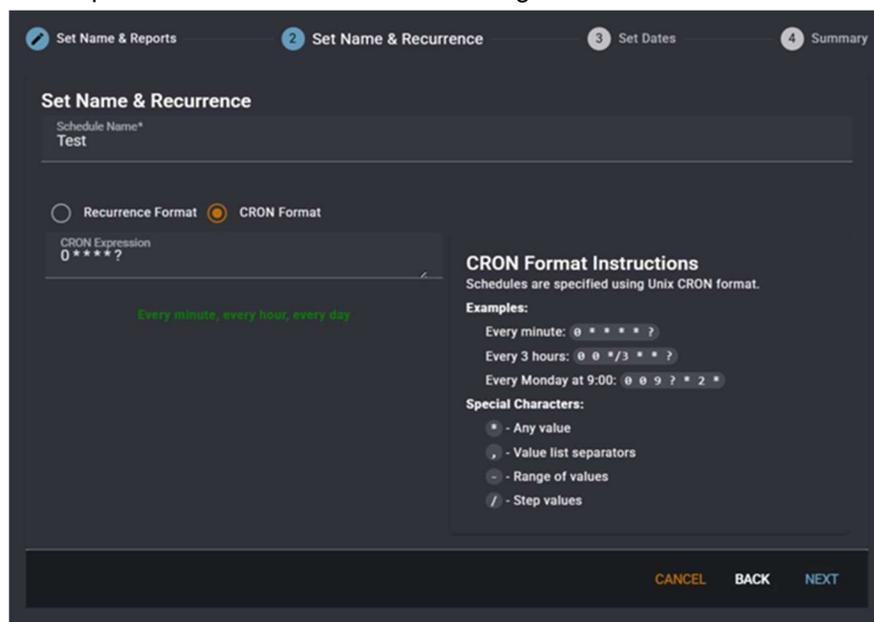
The    of Every    At    Time of day

Occurrence    Day    Month(s)

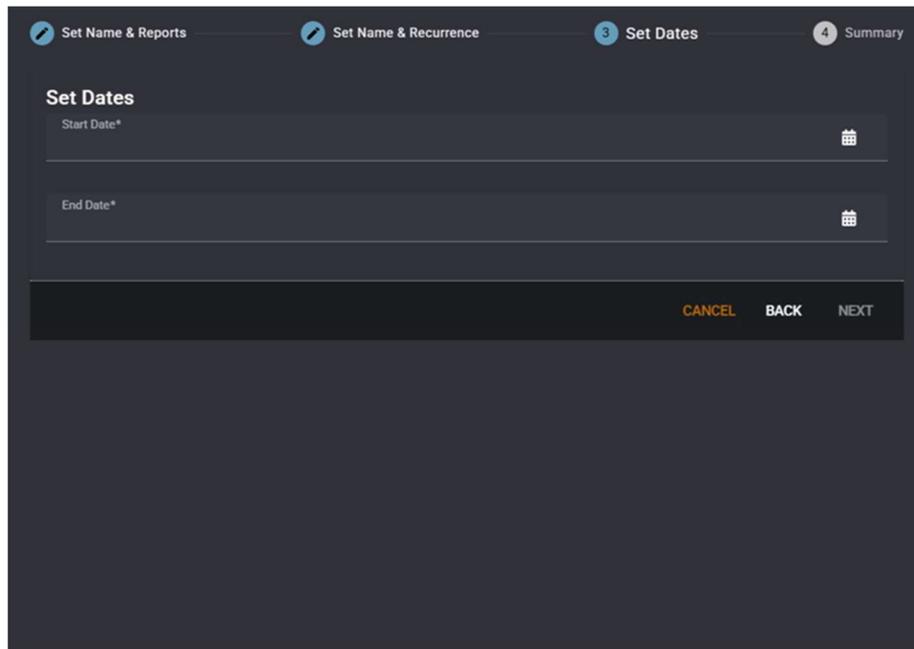
Occurrence is required    Day is required    Month(s) is required

CANCEL    BACK    NEXT

- **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.

1 Set Name & Reports
2 Set Name & Recurrence
3 Set Dates
4 Summary

### Schedule Summary

<b>Report Id</b>	<b>Schedule Name</b>	
01577e4f-6811-417f-b450-a064aa4445fc	Test	
<b>Workspace Id</b>	<b>Start Date</b>	<b>End Date</b>
bc94ac43-430a-4f9e-b1a3-de399e39a815	07/15/2025 18:52	07/15/2025 18:52
<b>Subject</b>	<b>CRON Expression</b>	<b>CRON Description</b>
ShipperBI Report:	0 0 9 ? * 2 *	At 09:00, only on Monday

**Message**  
Attached is a copy of the ShipperBI report.

**Recipient Email(s)**  
bharatha.desilva@xeynergy.com

CANCEL
BACK
FINISH

### 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.

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

Schedules / Schedule List + Create New

<input type="checkbox"/>	Actions	Schedule Id	Schedule Name	Customer	Application	Schedule	Start Date	End Date	Job Status
<input type="checkbox"/>		895	Test 7.15	DEMO	BI	At 09:00, only on Monday	07/15/25 13:53	07/31/25 14:49	Paused
<input type="checkbox"/>		892	Test 07.10	DEMO	BI	At 16:37, only on Thursday	07/10/25 16:35	07/10/25 17:44	Inactive
<input type="checkbox"/>		889	Schedule Test Report 3 - 6.6	DEMO	BI	At 15:25, only on Friday	06/06/25 15:20	06/06/25 16:19	Inactive
<input type="checkbox"/>		888	Schedule Test Report 3	DEMO	BI	At 15:15, only on Friday	06/06/25 15:10	06/06/25 16:10	Inactive
<input type="checkbox"/>		887	Schedule Test Report 2	DEMO	BI	At 15:05, only on Friday	06/06/25 15:03	06/06/25 16:02	Inactive
<input type="checkbox"/>		886	Schedule Test Report	DEMO	BI	At 14:56, only on Friday	06/06/25 14:54	06/07/25 14:53	Inactive
<input type="checkbox"/>		885	Test 2 US - 6.6	DEMO	BI	At 09:15, every day, starting from the 1st of the month	06/06/25 09:06	06/07/25 09:36	Inactive
<input type="checkbox"/>		884	Test SBI - 6.6	DEMO	BI	At 08:15, every day, starting from the 1st of the month	06/06/25 08:13	06/06/25 09:13	Inactive
<input type="checkbox"/>		883	Test 1 - 6.6 Edited	DEMO	BI	At 08:30, every day, starting from the 1st of the month	06/06/25 08:20	06/06/25 09:04	Inactive
<input type="checkbox"/>		---	---	---	---	At 16:45, every day, starting from the 1st of the month	06/05/25	06/05/25	---

Items per page: 10 | 1 - 10 of 191

Schedules / Schedule List + Create New

<input type="checkbox"/>	Actions	Schedule Id	Schedule Name	Customer	Application	Schedule	Start Date	End Date	Job Status
<input checked="" type="checkbox"/>		895	Test 7.15	DEMO	BI	At 09:00, only on Monday	07/15/25 13:53	07/31/25 14:49	Paused

selected-schedules [Protected View] - Excel (Product Activation Failed)

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

A1 Schedule Id

1	Schedule	Schedule	Customer	Applicatio	Schedule	Start Date	End Date	Job Status	Last Execu	Next Schem	CreatedBy
2	888	Schedule	DEMO	BI	At 15:15, c	2025-06-0	2025-06-0	Inactive	Success		maleenc
3											
4											
5											
6											
7											
8											
9											
10											

Schedules / Schedule List

[+ Create New](#)

Actions	Schedule Id	Schedule Name	Customer	Application	Schedule	Start Date	End Date	Job Status
	688	Test 22 - RMD - 29th every 3months		BI	At 00:00, on day 29 of the month, every 3 months	04/28/25 18:58	09/30/25 18:58	Active
	785	Test Sched #13 - RMS - Edited		BI	At 00:00, on the first Thursday of the month	04/30/25 21:35	12/31/25 21:35	Active

Schedules / Schedule List

Actions	Schedule Id	Schedule Name	Customer	Application	Schedule	Start Date
						07/15/25 13:53
						07/10/25 16:35
						06/06/25 15:20
						06/06/25 15:10
						06/06/25 15:03
						06/06/25 14:54
	885	Test 2 US - 6.6	DEMO	BI	At 09:15, every day, starting from the 1st of the month	06/06/25 09:06
	884	Test SBI - 6.6	DEMO	BI	At 08:15, every day, starting from the 1st of the month	06/06/25 08:13
	888	Test 1 - 6.6	DEMO	BI	At 08:30, every day, starting	06/06/25

**Schedule History - Test 7.15**

Execution ID	Start Date	End Date	Time Elapse	Status	Logs
Items per page: 10 0 of 0					

[CLOSE](#)