Creating the New Face of Buildertrend

Team Name: sddec20-07
Team Email: sddec20-07@iastate.edu
Team Members: Joshua Bump, Dallas Evers, Kailyn Mann-Calaway, Melissa Hernandez, Mitchell Knoth, Darnesha Randle
Team Leader Email: drandle@iastate.edu

Project Overview

- Our client Buildertrend is in the process of converting outdated ASP.NET pages into ReactJs
  - This process will make Buildertrend's website easier to maintain and more efficient
- Our team's job is to help Buildertrend convert pages to ReactJs
- Our team has been given the task to migrate over an internal user modal that is in charge of managing the users permissions, notifications, job access, preferences, and accounting aspects

Overview Page

Internal User Details   ✕

Save

Overview | Permissions | Notifications | Job Access (14) | Preferences | Accounting

Overview

Invite accepted on Nov 7, 2018 ☑ Active

First Name *
Sarah

Last Name *
Biben

Email
sarah.biben@buildertrend.com

Cell Email

Phone Number

Role *
Full Admin ▾

Manage Roles

Full Admin Permissions
Access to perform all actions on every item in Buildertrend.   →

Notifications   →

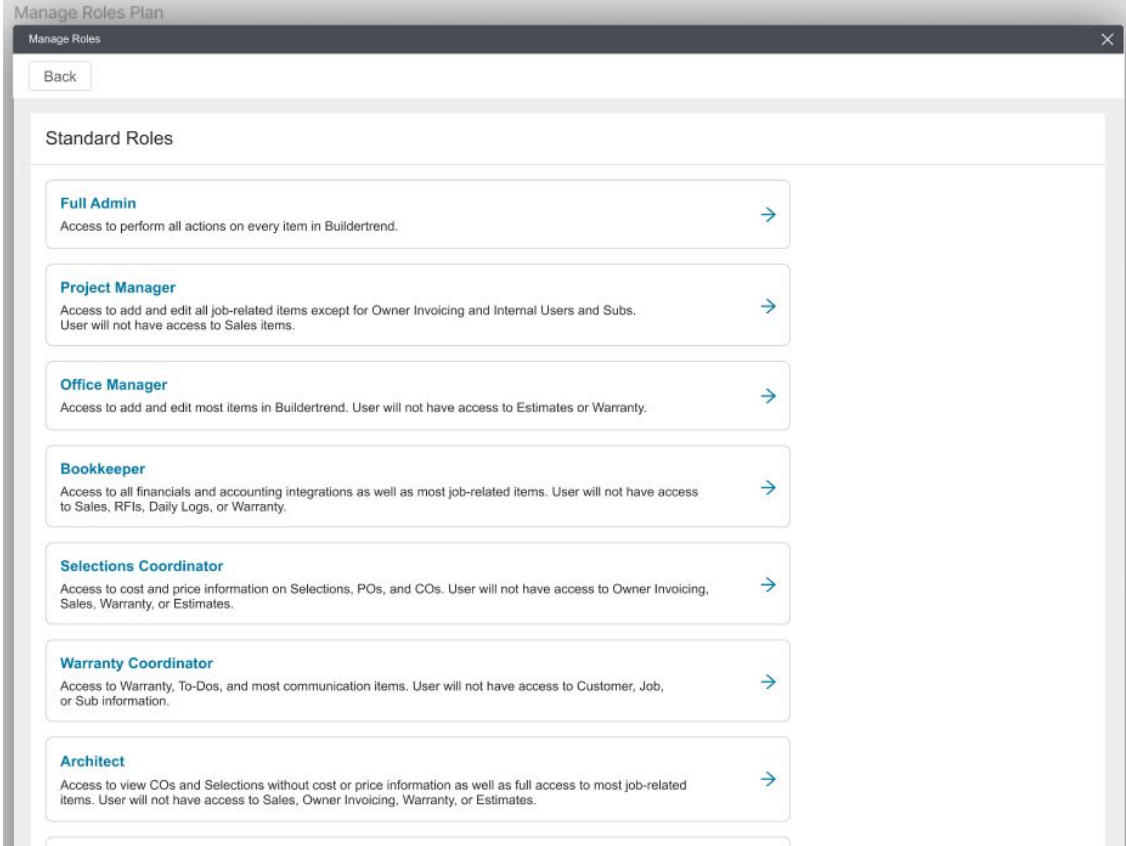**Job Access**   →

☑ Grant automatic access to new jobs.

User Information

Sarah Biben
Full Admin

Email
sarah.biben@buildertrend.com

Permissions Page

Manage Roles   ✕

Back

Standard Roles

Full Admin
Access to perform all actions on every item in Buildertrend.   →

Project Manager
Access to add and edit all job-related items except for Owner Invoicing and Internal Users and Subs.   →
User will not have access to Sales items.

Office Manager
Access to add and edit most items in Buildertrend. User will not have access to Estimates or Warranty.   →

Bookkeeper
Access to all financials and accounting integrations as well as most job-related items. User will not have access   →
to Sales, RFIs, Daily Logs, or Warranty.

Selections Coordinator
Access to cost and price information on Selections, POs, and COs. User will not have access to Owner Invoicing,   →
Sales, Warranty, or Estimates.

Warranty Coordinator
Access to Warranty, To-Dos, and most communication items. User will not have access to Customer, Job,   →
or Sub information.

Architect
Access to view COs and Selections without cost or price information as well as full access to most job-related   →
items. User will not have access to Sales, Owner Invoicing, Warranty, or Estimates.

Permissions Page

Manage Roles

Save   Back   Delete

Permissions   Assigned Users (3)

Internal User Custom Role Setup

Copy From Another Role

Role

Melk's Role

Role Description

This role is created for Mari to test the Internal User Custom Role Setup permissions.

	View	Add	Edit	Delete
	☐	☐	☐	☐
Sales				
Assign salesperson				
View other salesperson leads and activities				
Convert to job				
Export to Excel				
Project Management				
Schedule	☑	☑	☑	☐
Set baseline				
Daily Logs	☐	☑	☑	☑
To Do's	☐	☑	☑	☐
Assign users				
Global – can see all To Do's				
Change Orders	☑	☑	☑	☐
Selections	☐	☑	☑	☐

Preferences Page

Internal User Details ✕

Save   Save & New

Overview   Permissions   Notifications   Job Access (14)   Preferences

Preferences

User Settings

Archive User

Username *

Melk1234

Password

********************   Reset

Schedule

☑ Alert when there are multiple Schedule Item Conflicts

Schedule Item Conflicts

3 ▲▼

External Calendar Intergrations

Learn how to create a feed for your iCal, Google Calendar, or Outlook

Schedule Items

-- All Schedule Items Selected --   ▼

Create Feed

Lead Activities

Cows Fly Inc Activities   ▼

Create Feed

To-Do's

-- All To-Do's Selected --   ▼

Create Feed

Time Clock

☑ Require location on mobile and track when Ian clocks in or out beyond the geofence.

User Information

Sarah Biben
Full Admin

Email
sarah.biben@buildertrend.com

Preferences Page

Time Clock

☑ Require location on mobile and track when Ian clocks in or out beyond the geofence.

Default labor cost code

[▼]

Default Labor Cost

[   ][   ]

Message Preferences

Message Signature

[   ]

Font ▼ | Size ▼ | A ▼ A ▼ | B *I* U S̶ | ≡ ≡ ≡ ≡

Message Signature Image

⬆ Replace File

📎 Design Agreement - Final.png

Contact

Contact Information

[Textarea placeholder]

Textarea caption message.

▶ Custom Fields

Notifications Page

Internal User Details ✕

Save   Save & New

Overview   Permissions   Notifications   Job Access (14)   Preferences

Notifications

Browser notifications are on. To stop receiving browser notifications, go to your browser settings and choose 'block notifications.

		Email	Text	Push	All Users
		☐	☐	☐	☐
Sales					
Leads	Other employee contact	☑	☑	☐	
	New lead from contact form	☐	☐	☐	
	Lead salesperson changed	☐	☐	☐	
	Activity Reminder	☐	☐	☐	☐
	Email quota reached	☐	☐	☐	
	Assigned to lead activity by another user	☐	☐	☐	
	Lead proposal accepted/declined	☐	☐	☐	☐
	Lead proposal viewed	☐	☐	☐	
	Link clicked by lead	☐	☐	☐	
	Payment made on proposal	☐	☐	☐	
	Lead proposal past due	☐	☐	☐	
Project Management					
Schedule	User needs to confirm a schedule item	☐	☐	☐	
	User confirmed a schedule item	☐	☐	☐	
	User declined a schedule item	☐	☐	☐	
	New comment	☐	☐	☐	
Daily Logs	New Daily Log	☐	☐	☐	
	New comment	☐	☐	☐	
To-Do's	Completed or re-opened by another user	☐	☐	☐	

User Information

Sarah Biben
Full Admin

Email
sarah.biben@buildertrend.com

Job Access Page

Internal User Details

Save   Save & New

Overview   Permissions   Notifications   Job Access (14)   Preferences

Job Access

	Job Name	Job Status	Date Opened
☑	Aaron Smith	Open	Oct 01, 2019
☐	Bricks	Open	Jun 11, 2019
☐	Brown - 5521 Elmwood - H.24001	Open	Jan 07, 2014
☐	BT Media Schedule	Open	Feb 28, 2020
☐	Clarkson Commercial Remodeling Services	Open	Aug 23, 2019
☐	Corby - 541 S. 198th St - H.24002	Open	May 30, 2017
☐	Dugger - 321 A. St - H.24003	Open	Jan 07, 2014
☐	Karen - 1345	Open	May 31, 2019
☐	Lamason - 26 Tall Lane - H.24004	Open	Jul 08, 2015
☐	McKenna - 11818 I St. - H.24005	Open	Nov 26, 2018
☐	Rodger Atkins	Open	Jun 12, 2019
☐	Rodger Atkins	Open	Jun 12, 2019
☐	Smith - 125 B St. H.24006	Open	Aug 08, 2018
☐	Sub Demo	Open	Jun 11, 2019
☐	Thomas - 414 S. 198th - H.24007	Open	Oct 17, 2016

User Information

Sarah Biben
Full Admin

Email
sarah.biben@buildertrend.com

Software Design

InternalUserDetails

InternalUserDetails API—This is where API calls for the whole modal are made.

InternalUserDetails.tsx—This is where the React State and Props are defined for IURD. One of the required props is an InternalUserEntity, which is necessary to be able to retrieve all of the relevant data for this modal and its tabs.

InternalUserDetailsPresentational.tsx —To keep things organized, most of the visual renderings are handled in this presentational class, not in the IUD.tsx file. This is where we'll begin making changes and adding the tab presentationals.

InternalUserDetailsPermissions

IUDP API—This is where API calls for the permissions tab are made.

IUDP.API.types—This is where entity types to be used in this tab are defined.

IUDP.tsx—The state and props are defined, as well as where our API handler is used. The layout is designed this way so that there is a minimal amount of logic happening in the presentational layer.

IUDP Presentational—This is where the rendering for the permissions tab, inner modals, buttons, etc. is taken care of. Any data that is being used here should be passed in by the IUDP.tsx file.

Timeline

- Completed by
  - Oct 15: Permissions and Job Access
  - Nov 1: Notifications
  - Nov 15: Preferences
- We will be meeting with our client soon to discuss future milestones

Challenges

- Our team is working entirely remote due to the pandemic. Buildertrend is also working remotely currently, which has affected the availability of our project advisors.
- It took many weeks for us to receive access to Buildertrend's VMs
  - Just received access ~2 weeks ago, so we have been unable to work on the new pages until then

Technical Challenges

- Often times, different team members are locked out of the BT repos and accounts. This can be a big time drain.
  - The BT Team Help group is only available during business hours, which means if we are locked out of our accounts, we must wait until the next business day to have the problem addressed

Our plans/goals for the semester

- Finish the pages assigned to us, ideally more
  - Code the new pages
  - Work with Buildertrend to work through technical problems that contribute to delayed development
- Thoroughly document the processes
- Updating Tech Discovery for future employees to reference