Release Notes

Tenrox 2015 R1 Service Pack 1
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Tenrox by Upland Software

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Glossary of Terms

Term	Description
AmEX	American Express
BUG	Prefix of a Bug reference number
CBug	Prefix of a Hot fix reference number
CWP	Collaboration Workforce Planning
EXI	Prefix of an Enhancement reference number
G/L account	General Leger Account
GP	Great Plains Application
HSLA	Hosting Service Level Agreement
MSP	Microsoft Project
OBS	Organization Breakdown Structure
OLAP	Online Analytical Processing
PO	Purchase Order
QB	QuickBooks Application
R3	Tenrox Release 3
Ref:	Internal Reference number
Service Pack	Collection of updates, fixes or minor enhancements to a software application delivered in the form of a single installable package.
SP	Service Pack
Tenrox	Tenrox Web application
TMobile	Tenrox Mobile Applications
TPP	Tenrox Project Plan
UDF	User-Defined Field
User	Tenrox end user
WBS	Work Breakdown Structure
WIP	Work-In-Process

About this Document

This document contains information about what's new and resolved as of Tenrox 2015 R1 Service Pack 1.

Tenrox Technical Support

Tenrox Technical Support is a team of Application Support Analysts trained to use, configure, and troubleshoot Tenrox applications in your specific enterprise environment. If you have any questions, you can reach us by:

- Calling 877-483-6769, option 2 (toll-free)
- Sending an email to tenroxsupport@uplandsoftware.com

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Introduction

Upland Software is pleased to announce the release of:

Tenrox 2015 R1 Service Pack 1

Upgrade process: *Tenrox 2015 R1 SP1* installation is performed by Tenrox during the maintenance hours established in the HSLA. For additional information regarding the HSLA, please refer to:

http://www.tenrox.com/en/legal/hostingsla.htm

What's New

This section includes minor enhancements added to Tenrox 2015 R1 SP1.

Mobile

TE-1860   Added a default Tax Group value to the Expense Entry Edit page of Tenrox Mobile, which displays when creating a new Expense entry for a taxable expense item. The default value will either be:

- The same as the Tax Group defined for the Active Site, or
- The system-level Purchase Tax Group when there is no Tax Group defined for the Active Site

TE-1861   Added a default Payment Method value to the Expense Entry Edit page of Tenrox Mobile, which displays when creating a new Expense entry. The default value will be the first payment method listed.

TE-1862   Added the Ref (reference) Number to display for each Expense entry on the list page of a given Expense Report in Tenrox Mobile, making it part of the newly added item line number that will display on any of the list pages. The format of the line item number will be "#N <ExpenseItem> for <TaskName>. Editing the Ref Number will be available through the Tenrox Portal and the updated item line number will display on Mobile accordingly. Whereas overriding of the expense item line number will not be available through Tenrox Mobile.

TE-1863   Added the Reimbursable amount and currency, displayed at the bottom-right, for the applicable Expense entries on the list page of a given Expense Report in Tenrox Mobile. Non-reimbursable items will display 0.00 with the in red. The existing system-level currency will only show on the assigned expense reports page and not for the entry. Further additions made on the Entry list page include:
The Attach button (denoted by a paperclip) available at the top-right. Attribute bubbles displays to right side. Unless attributes are hidden, they will be displayed: checked items in blue, unchecked items in grey. Bottom-left amount will display in entry currency and labeled "Incurred".

Reporting

TE-7414
Fixed an issue in the Reports module where the error message, "*Unable to get property 'end' of undefined or null reference.*", was immediately generating when attempting to access the Reports page with the user not having been granted access to or did not already have any visible/available report tabs. The applied resolution forces the addition of a new tab through a New Tab dialog box that will display if the user doesn't already have any visible to/available for them.

TE-7098
Enhanced the Upland Analytics report design to prevent joining views with different transaction types as it corrupts the data viewed in the report e.g. report design cannot link a Time entry basic view with the expense entry basic view as they are different types. When saving or viewing a report with multiple views, validation will trigger to verify all the transactional views are of the same type, and when otherwise the following error message will display:
English: "*Some of the data sources you have selected cannot be used together. Please review the report design.*"
French: "*Impossible d'utiliser ensemble certaines sources de données sélectionnées. Veuillez revoir la conception du rapport.*".

TE-7762 & TE-7674
Fixed an issue when designing an Upland Analytics report, which triggered the newly added validation enhancement (TE-7098) due to multiple views with different transaction types, consequently clearing the entire report design settings. The applied resolution allows the design settings to be maintained giving the User the opportunity to correct the report design after the error message displays, as per TE-7098. .

Tenrox Project Plan (TPP)

TE-7791
Added a default Work Type change. In the old functionality the user had to re-do the connection to bring in the updated Work Type from Tenrox. The new functionality change applies when the user is editing a Task in TPP and performs a browse for the Work Type, TPP will then bring and update the cached system default work type from the Tenrox application.

Resolved issues

This section lists resolved issues included in Tenrox 2015 R1 SP1.

Charges

TE-6493   Fixed an issue in the Charge entries list (Entries > Charges > My Entries or Approval) where the error message, "*Error converting data type nvarchar to numeric",* triggered after having added the "Amount Base Currency" to the Column Selection and setting it as Searchable, subsequently searching on this newly added column.   The applied resolution facilitates performing a search using a numerical criteria.

Expenses

TE-7454   Fixed an issue in the Expense list of the Expense Report in Work View where the expense items were not displaying properly in alphabetical order. The applied resolution has the expense items automatically listed alphabetically.

Financials

TE-6548   Fixed an issue with the State/Province and Country boxes of the Format tab, in the Invoice Edit page, where the value was displaying incorrectly for the selected Contact and/or when they contained special characters. The applied resolution has these values properly displaying the full names.

TE-7034   Fixed an issue with the Batch Number box of the Invoice Edit page, through an Invoice Batch (Multi Client Invoice Manager Edit page), where changing the invoice batch, under which the invoice falls, was not saving when using the Chrome browser. The applied resolution allows the change to save successfully using Chrome and the other key browsers.

TE-7351   Fixed an issue on the Clients tab, under the Multi Client Invoice Manager Edit page, where removing a client(s) was not saving successfully after clicking Finish when creating a new Multi Client Invoice Batch. The applied resolution enforces the removal of a client(s) once completing the creation of a batch, not requiring more than one attempt to make the removal.

TE-7713 Fixed an issue on generated Invoice reports where there was a discrepancy of the line item(s) and total values with those displayed on the Summary tab of the Invoice Edit page. The applied resolution required modifying the stored procedure of the following out-of-the-box invoice reports, and any applicable customized invoice reports, to correctly, consistently and automatically execute the calculations:

- Detail invoice by Resource
- Detailed invoice by Project/Resource
- Detailed invoice by Project/Task
- Detailed invoice by Project/Task with note

TE-7757 Fixed an issue on the Employee Matrix page, under Payroll Connection Setup, where all the User Type check boxes were not visible as a result of an unnecessary dependency on security rights granted for the Financial Expense Payable at the Management level. The applied resolution was having the security validation disregarded to allow the checkboxes to display.

Integrations

TCU-396 Fixed an issue on the Advanced Options page, under the CRM Integration Options page, where the validation query entered in the Import Filter Logic box was not saving successfully causing the automation service to fail, which was the result of the text in the box having been truncated. The applied resolution was increasing the amount of allowable text in the box.

TE-4364 Fixed an issue with the Default Pre-Billing Workflow box of the Invoice Options Default Settings tab, under the Client Edit page, where the value was setting to null after updating and importing the Project/Client from a CRM tool, preventing the creation an invoice. The applied resolution was to maintain the selected value after an update/import from a CRM.

TE-7235 Fixed an issue with the CRM logs export to excel file, generated from the logs page (Dashboard Design) under Tools/Import/CRM, where the Import/Export Date/Time column was only showing the Date while the Time stamp was missing. The applied resolution was correcting the format in the Date/Time function so that the time is also automatically shown.

TE-7239 Fixed an issue under Financial/WIP Accrual Batch Manager, where WIP Accrual Batch Transactions were not exporting successfully to Microsoft Dynamics Great Plains.

TE-7349 — Fixed an issue with logging into Tenrox where the login credentials of the User attempting to log in was imported from either QuickBooks (QB) or MS Dynamics Great Plains. The applied resolution was to properly and automatically install the required QB and MS Dynamics GP component for successful Tenrox log in.

Collaboration

TE-7960 — Fixed an issue with the Project Status Reporting (PSR) page (Entries > Project Status Reporting) where adding a Memo type User Defined Field (UDF) to the Project Status component through the Status Report Setup page (Setup > Work >Projects) resulted in square memo UDF instead of the expected rectangular box. The applied resolution displays a rectangular Memo UDF.

Mobile Application

TE-4347 — Fixed an issue with Assigned Timesheets in Tenrox Mobile where it was taking an abnormal length of time to pull up timesheets that contain large volumes of assignments for the timesheet owner. The applied resolution was improving performance when loading timesheets in the Mobile App regardless of the number of existing assignments.

Logon Page

TE-7160 — Fixed an issue with the Tenrox login page, using Windows Authentication, where on entering the user name/password then clicking Sign-in was redirecting the user back to the login page. The applied resolution was properly setting up the Authentication to ensure that the Users are automatically logged into Tenrox once a session is initiated, as it should not require having to go through the password validation process.

TE-7745 — Fixed an issue with logging in using Single Sign-On (SSO), which resulted in the inability to successfully log in to Tenrox.

Reporting

TE-6378   Fixed an issue with reports from the Reports page where the User was incorrectly able to generate a report on projects they have no rights to viewing. The applied resolution was to automatically validate, prior to generating the report, whether the User has or has not been granted rights to report on a given project(s).

TE-7556   Fixed an issue with the following reports from the Reports page where the billable totals were being incorrectly represented when the User has billable and non-billable hours distributed across the same day on their timesheet:
- Project Revenue Detailed by Resource
- Project Revenue Detailed by Task
- Project Revenue Summary

The applied resolution captures only the actual billable time in order to generate the correct revenue values for these reports.

TE-7683   Fixed an issue with the RDLC report where it was caching the report result and was not showing the correct data for the updated parameters. The applied resolution has the results correctly representing the current parameters, whether they have just been updated or not, upon generating the report.

Resource Management (formerly CWP)

TE-4279   Fixed an issue in the Project Work Plan where there was the inability to successfully add a booking from the bottom grid as the error message "*The booking cannot be created because required fields are missing. Please provide a value for all required fields before proceeding.*" was generating.

TE-7247   Fixed an issue in the Project Work Plan where there was the inability to add a booking for a User with their primary role when the User or Role was not part of the initial 25 items in the User or Role list. The applied resolution allows the primary role to automatically display with the user having been selected, and allows the user(s) to automatically populate the list with the role having been selected.

TE-7709 Fixed an issue in the Project Work Plan where there was the inability to create a booking as the error message "*An error occurred while executing the command definition. See the inner exception for details*" was generating as a result of having 3 custom selection booking attributes that are part of the Add Booking process. The applied resolution was to improve the handling of the third custom selection attribute in the stored procedure.

TE-7752 Fixed an issue within the Project Work Plan (tab) under the Project Edit page where the resource list was being improperly updated when navigating between periods, resulting in the list displaying resources that were not booked or allocated time during the given period, and not adhering to the "Hide" settings for the given View. The applied resolution was rectifying the stored procedure to correctly show the resources actually having Bookings/Allocations for the given period and represent the selected "Hide" setup.

TE-7485 Fixed an issue with exporting the Resource Scheduling (Work Plan) to excel where the comma Decimal Separator property, selected under the System Regional Settings (Setup > Organizations > System > System Setup), resulted in the Allocation values as having been multiplied by 100. The applied resolution properly displays the Allocation values on the excel export as configured in System Regional Settings.

Setup

TCU-12 Fixed an issue in the Assigned Tasks page of the Project Team tab within Project Edit where assignments were not saved for the first Resource listed on the first page selected when assigning a large number of tasks to multiple pages of Resources. The applied resolution was correcting the logic to process all selected Resources.

TE-4332 Fixed an issue with Leave Requests, where Leave Requests that were discarded/rejected/reopened were not triggering timesheet and user calendar updates to reflect these actions. The applied resolution correctly deletes time entry/entries originally inserted based on approved leave request(s). Additionally, the logic to successfully update the user Calendar has been modified to be able to properly recognize and enforce either a User-defined or out-of-the-box Leave Request Workflow.

TE-7379   Fixed an issue in the Work Process entry where tasks, despite not being flagged as Used by Work Process, were incorrectly displaying for selection. The applied resolution has a new function where only tasks having the Used by Work Processes set are to be made available in the Work Process entry.

TE-7417   Fixed an issue in the Project Budget tab where the cost currency for a budget was incorrectly inheriting the company currency instead of the system currency, which was reflected on the Budget page and Summary. The resolution will properly apply the "Enforce system currency for Budgets" option when it is selected and the budget will correctly inherit the base currency.

TE-7438   Fixed an issue with the security for the rights to modify and delete Hard Bookings where Users, who were not granted these rights, were still able to modify a Hard Booking. The applied resolution will validate the security that was granted to the User on any attempts to create, modify or delete hard bookings.

TE-7620   Fixed an issue with the Cycle setup for Expenses under Setup/System where changing the cycle from semi-monthly to weekly was not saving successfully. The applied resolution successfully enforces the change made to the cycle, correctly reflecting such an update in the Report Interval of the Expense Report.

TE-7706   Fixed an issue in the automation where the Concur integration service triggered the automation to run every second, leading to huge log files, and causing the service to function improperly.

TE-7792   Fixed an issue with Task creation in Work/Setup/Task Edit where the page was not allowing the entrance of a name to create a new task after having added TPP licenses to Tenrox. The applied resolution allows the creation of tasks from Tenrox after adding TPP licences.

TE-7685   Fixed an issue within the Forecast Rate Association dialog box, accessed through the resource (right-click) context menu option from the Project Team tab of the Project Edit page, where a partial search for a Billing or Cost Rate, upon clicking New, was only displaying the first possible result. Viewing the rest of the results required clicking the double arrow at the bottom of the list box. The applied resolution was to make a correction to the way the control functioned, not limiting the listed results of a partial or full search.

TE-7867   Fixed an issue on the Project Team tab of the Project Edit page where the Forecasted Cost and Billing Rates displayed were still those associated at the User's profile level as opposed to the existing Project-dependent rate. Additionally, when no Project level Forecasted rate rule was associated to a resource, the incorrect rate rule name was displaying. The applied resolution of modifying the grid stored procedure correctly reflects the current Project level rate rule association and when none currently exists, but one did in the past, the rate rule displays as "*No current rule*".

TE-4381   Fixed an issue with wildcard (%) searching for a Role(s) through the Roles list page (Setup > Organization > Roles) and the Work Plan (all views) where the results were not as expected. The applied resolution correctly generates the searched Role(s) through both areas.

TCU-393

Fixed an issue in the Financial Planner with a Fixed Fee with Milestone Forecast Method where the resulting Combined view displayed the incorrect Recognizable Amount value. The applied resolution uses the amended calculation to reflect the correct Recognizable Amount.

TE-1316

Fixed an issue on previewing a Dashboard, through the Dashboard Edit page (Setup > Organization > System > Dashboard Setup), with the Project and Portfolio vies where the % Complete and Budgeted Hours columns were truncated. The applied resolution properly displays these columns.

TE-7183

Fixed an issue with the Projects List Filter capability (Setup > Work > Projects) where using it to filter the Projects lists for Suspended or Cancelled projects, for example, does not work consistently for all users. The applied resolution correctly filters the list as defined by the selected Filter criteria.

TE-7262   Fixed an issue with the Financial Planner, on the Project Edit page, where it was timing out upon attempting to open it for a specific project. The applied resolution allows clicking and viewing the Financial Planner without any timeout occurring.

TE-7627

Fixed multiple issues with the Financial Planner, on the Project Edit page, and the global Forecast Settings:

- Upon accessing the Financial Planner page, there was a User Interface issue where the grid values were displayed incorrectly.
- The forecast categories and items were not displaying on the Financial Planner as defined in the Forecast Settings under the Financial Company (Setup > Financial > System > Accounting System).

The applied resolution correctly displays the grid values and enforces the defined Forecast settings.

TE-7827

Fixed an issue with the Financial Planner, on the Project Edit page, where the manually added non-labor amount was not saving successfully upon creating a Baseline. The applied resolution enforces the saving of a manually entered value.

TE-7592

Fixed an issue with the Forecast Rate Association, through the Project Team tab of the Project Edit page, where the ability to create a new rate rule association was completely unavailable, even with the user possessing rights to create Cost and Billing rules. The applied resolution corrected the behavior of the Forecast Rate Association dialog box.

TE-8019

Fixed an issue with the financial planner where the recognizable amount was displayed as zero for all periods when unchecking the "Recognized Revenue" option in the forecast setting template.
Fixed an issue with the Financial Planner where the Recognizable Amount changed to a 0 (zero) value across all periods upon clearing the Display Recognized Revenue and Deferred Revenue options, regardless of selected Forecast Method. The applied resolution maintains the correct value for the Recognizable Amount even when any of the Other Forecast Settings options are modified.

Tenrox Project Plan (TPP)

TE-6979

Fixed an issue in TPP where checking in a Project was intermittently generating the error message, "*An item with the same key has already been added*". The applied resolution allows for complete and successful check in of a Project.

TE-7238	Fixed an issue in TPP where a project, with a task that was copied from another project, was not successfully being published due to the error message, "*Task already exists in the Tenrox database against a different Project. Please contact your system administrator.* *Additional details: Task Reference: 2d6201d6-6e29-4b63-8d3c-c9feac18e616 Error Detail(s): Task ID: X*", that was generating. The applied resolution will bar attempts to copy objects through multiple instances of TPP.
TE-7453	Fixed an issue in TPP where the attempt to change the Work Type, through the publishing of the project with a different Work Type for the same task, was not successful.
TE-7471	Fixed an issue in TPP where searching for a Task within a Project was generating an error message, "*Exceptions: IndexOutOfRangeException - Index was outside the bounds of the array. …*".
TE-7494	Fixed an issue in TPP where the Tasks in TPP were not synchronized with Tenrox.
TE-7513 & TE-7708	Fixed an issue in TPP where manually changing the Planned Work value was not changing the font to the red color, in the split view, as expected.
TE-7722	Fixed an issue in TPP where, after updating the Task Planned Hours and the Assignment Allocated Hours and the Task and Assignment dates were modified accordingly, an error message was triggering.
TE-6811	Fixed an issue with the Task properties in TPP where modifying the assigned resources and the duration triggered the recalculation of the planned work even though it was overridden manually. The applied resolution maintains the manually overridden planned work value regardless of any Task property modifications.
TE-7537	Fixed multiple issues with the Task properties in TPP where attempting to remove predecessors resulted in the change not saving successfully, the constraint type having inadvertently changed from "As soon as possible" to "Finish No Earlier Than", and the task name having duplicated in the predecessors' task name list.

TE-7564 Fixed an issue, in TPP, with the tabs within the Task Information dialog box where updating the properties of more than one of these tabs and attempting to save the changes, concurrently, was failing. Furthermore, the Task Start and End Date were not properly shifting and the assignment Start and End Dates were not synchronizing accordingly. The applied resolution was modifying the logic behind properly applying the date and other changes

TE-7611 Fixed an issue, in TPP, under the Resources tab of the Task Information dialog box where an error, "*Character Out of Range Error.*", generated after attempting to correct the assignment date, which inadvertently changed upon enforcing the Constraint type "As Late As Possible". The issue was further elevated upon attempting to close/cancel the error notification, which resulted in TPP crashing. The applied resolution was modifying the constraint change method to better handle updates to the constraint property.

TE-7353 Fixed an issue, in TPP, with the Resources tab within the Task Information dialog box where attempting to change the Allocated Work was not saving successfully. The applied resolution was modifying the logic to allow the proper saving of an update made to the Allocated Work.

TE-7707 Fixed an issue in Task Information of TPP where attempting to change the Task Start Date was not updating successfully. The applied resolution allows such a change to be completed, and upon modifying the Task Start Date that the Resource Allocation Start Date be also automatically updated.

TE-7618 Fixed an issue in TPP where attempting to publish a project was generating an error message, "*The conversion of the nvarchar value '7477977600' overflowed an int column.*"

Timesheet

TCU-421 Fixed an issue in Timesheet Manager where an error message was generating upon attempting to open timesheets. The applied resolution was optimizing the performance in the procedures.

TE-6853 Fixed an issue with Timesheet where the Copy Timesheet option was not copying the In/Out time. The applied resolution involved the addition of new parameters to facilitate the ability to copy the In/Out time.

TE-7085   Fixed an issue in Timesheet Manager where the newly created Timesheet Manager View was not successfully executing the defined criteria to sort by username in ascending order. The applied resolution was enhancing the sorting mechanism.

TE-7108   Fixed an issue with Timesheet, from the Assigned Timesheet view of the Timesheet Manager page, where the incorrect Timesheet State was showing.

TE-6806   Fixed an issue with Timesheet, where the Timesheet owner was unable to enter/modifying their time entry on a partially rejected Timesheet as the error message, "The Time Entry cannot be updated because there are Overtime rules associated to the Timesheet", was triggering despite the absence of an Overtime Policy. The applied resolution was correcting the code in order to allow the entering/editing time on a partially rejected Timesheet.

TE-7828   Fixed an issue with Timesheet, where after making an entry in a cell and creating a Public note, new notes were inadvertently being created when clearing then selecting the Public option again. The applied solution will have new notes created only when actually selecting to do so.

TE-7830   Fixed issues with Timesheet, where there was the inability to delete a note by clearing the box, and new notes were inadvertently being created when modifying existing notes. The applied solution allows to successfully delete the note without being caught in a loop, and editing an existing note will update it not add new notes.