Release Notes

Tenrox 2015 R1 Service Pack 3

October 2015

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 3.

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

Tenrox Software License Agreement

For additional information, please contact Tenrox at:

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Introduction

Upland Software is pleased to announce the release of:

Tenrox 2015 R1 Service Pack 3

Upgrade process: *Tenrox 2015 R1 SP3* 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 SP3.

Financial Planner

TE-8574

Added the option to display the Recognizable row in the Financial Planner. The properties around this minor enhancement are:

- Addition of a new check box, named "Display Recognizable Revenue", on the Forecast Settings page within the "Other Settings" frame.
- By default this option will not be selected
- When the "Display Recognizable Revenue" option is selected, the Recognizable Revenue row will display on the Financial Planner, otherwise the row will be hidden in all Views
- The option can be set in the Forecast Settings page at the Accounting Company level (Setup > Financial > System > Accounting System > Company List > Company Edit > Forecast Settings) and can be overridden at the Project level (Setup > Work > Projects > Project Edit > Override Template & Forecast Settings > Forecast Settings)

TE-8575

The Recognized Revenue value for a period in Financial Planner will now assume the Recognized Revenue to be "0" (zero) if there is no data imported for a project for an actual period. The behaviour of the Recognizable Revenue and Total Revenue will be the same if there is an imported value of "0" or no value for an actual period. This enhancement applies to the selection of the Display Recognized Revenue option set to either "Total Only" or "Recognized Revenue by Labor and Expense" on the Forecast Settings page.

Integrations

TE-7897

Added, in the Concur integration, functionality to configure the default Billable value of imported Expense Entries. Users can use a Concur field to control per expense entry whether it is billable or not, or can now set all imported items as Billable / Non-Billable.

TE-7891	Added, in the Concur integration, functionality to map Client and Project data from Concur into Tenrox without exporting all the Clients and Projects in Tenrox into Concur. Users can use the default integration which synchronizes the selection values in Concur's connected lists to map to Tenrox Clients and Project, or can now determine which field in Concur represent the Client-Project relationship.
TE-7896	Added, in the Concur integration, functionality to manually map Concur integration IDs inside the Tenrox Integration page in order to support a single Concur field representing the Client-Project relationship. Users can now define the value of a Project Integration ID by typing the Client-Project relationship value in Concur into the integration ID field in Tenrox on the Project.

Purchase

TE-8527	Enabled the Vendor box in the Purchase Order (Entries > Purchase > Purchase List > Purchase Order Edit). The Vendor in the Purchase Order can now be edited even after entries have been created, provided it is in the “Initial” workflow State or no other attributes have been selected on a given State. When the Vendor is updated all the corresponding entries under the purchase order will automatically inherit the modified vendor. If the Vendor has been added to a workflow criteria, the Vendor box will not be available for editing.

Resolved issues

This section lists resolved issues included in Tenrox 2015 R1 SP3.

Expenses

TE-4311	Fixed an issue with the Expense Report List page (Entries > Expense Report > Expense Report List) where the name of the assigned resource was no longer appearing when hovering over the State name after having opened and closed the Expense report. The applied resolution is eliminating the need to refresh the page in order to display the name of the assigned resource upon hovering over the state name.
TE-5923	Fixed an issue with the Expense Report where neither the Master Administrator nor the Expense Report creator were able to create or edit notes at the Expense Entry level. The applied resolution allows the creation or editing of notes at the any level, including the Entry level, regardless of what state the Expense Report is in.
TE-7955	Fixed an issue on the Expense System page (Setup > Expense > System) where attempting to save a change(s) to any of the Entry Attributes was triggering an error. The applied resolution allows to save the changes successfully and without any errors.
TE-8741	Fixed an issue with the Expense Report where an error was triggered upon attempting to create an Expense Report.

Financial

TE-8065	Fixed an issue with the Invoice Batch module where the Client contact was being used upon generating an invoice despite the Use Project contact option having been selected.
TE-8449 & TE-8749	Fixed an issue with the Currency Exchange (Setup > Financial > Currency Exchange) where attempting to add a new Quote Currency with the corresponding Exchange Rate was triggering the incorrect validation and generating an error.

TE-8465 Fixed an issue with Payment Terms (Setup > Financial > System) where attempting to access the Payment Terms page, without an Expense license, was triggering an error. The applied resolution is to use the correct license allowing proper access to the Payment Terms page.

Integrations

TE-8805 Fixed an issue with the setup of the CRM integration to Tenrox where, on the Map Fields page (Setup > Organization > System > CRM Integration > CRM Integration Options > Mapping tab), the Tenrox Fields that are to map to the CRM Fields were showing as HTML Tags in the list boxes.

TE-8544 Fixed an issue concerning the CRM integration with Tenrox where the "Apply Client Tax Group when invoicing Expenses" option set and saved on the Expense Invoicing page (Setup > Work > Clients > Client Edit > Invoice Options tab) was not retained after updating CRM Account through CRM.

Log In

TE-7852 Fixed an issue with the Tenrox login where an administrator was unable to log in to the Tenrox application.

Miscellaneous

TE-8902 Fixed an issue with the Tenrox Runtime installer not working as expected as a result of missing dependency dlls for the Workflow viewer. The applied resolution was to add the missing dll files to the installer.

Mobile

TE-7971 Fixed an issue with Time Entry through Tenrox Mobile where the Task and Project lists were inaccessible for selection.

TE-8222 Fixed an issue in Tenrox Mobile where attempting to open and view a Timesheet was generating an error message as a result of it containing multiple identical assignments with different attributes.

Organizational Breakdown Structure (OBS)

TE-6817	Fixed an issue with the setup of Leave Time where the interval set up of the Accrual Rule, at the User level, was incorrectly calculating the User balance.

Reporting

TCU-422	Fixed an issue in the Reports module where the logged user was unable to access a report even with proper rights to access the report and define values for its parameters.
TE-7405	Fixed an issue in the Reports module where the Billable Amount, in the Client Currency, was being calculated incorrectly when there existed multiple Billable adjustments for the same user in the same date against the same task and Charge.
TE-8387	Fixed an issue with Upland Analytic Reports, in the Reports module, where the project's true State was incorrectly being represented in the Report. The applied resolution was to modify the logic of the Final State within the Project Workflow to accommodate multiple scenarios.
TE-8479	Fixed an issue in the Reports module where the "Expenses by Client" report was incorrectly displaying values in the Reimbursable column that actually belong under the Payable column.

Resource Management

TE-8419	Fixed an issue with the Group Work Plan where attempting to access it through a parent group context menu, through the Groups page, was triggering an error due to another group work plan having an identical view and both are set to FTE.

Tenrox Project Plan (TPP)

TE-8587	Fixed an issue in TPP where importing resources that have available hours for any project were not showing these resource availabilities in the Resource Chart.

Timesheet

TE-7905 Fixed an issue with the Timesheet where a refresh glitch was causing the red line, that's a flag for a missing mandatory note within the time entry cell, to not appear despite the note being enforced from Timesheet Template setup.

TE-8141 Fixed an issue with the Timesheet where time to load and move from state to state was taking too long.

TE-8445 Fixed an issue with the Timesheet where attempting to make a time entry was triggering an Arithmetic Workflow Exception error.

TE-8680 Fixed an issue with the Timesheet where attempting to create a time entry generated an error as a result of the corresponding Timesheet Template having been set up with the "Display only Assignments with Time Entries in the previous period" option.

TE-4330 Fixed an issue with the Timesheet where the Exceptions rule set for time entries not created or updated on their entry dates was not being enforced.

Tools

TE-8347 Fixed an issue with the Audit Trail (Tools > Audit Trail) where none of the Expense Reporting actions were being tracked despite having properly enabled the Audit Trail for all Expense Reporting actions. The applied resolution was to properly implement the expense item audit.

Work Breakdown Structure (WBS)

TE-5570 Fixed an issue with the Projects Hierarchy (Setup > Work > Projects) where attempting to move a project up towards the top to change the placeholder (parent project) was not repositioning the project from under the original placeholder to the new placeholder as expected.

TE-7404 Fixed an issue in the Task Statistics page the (Setup > Work > Tasks > Task Edit) where the Time values were calculated incorrectly.

TE-7506 Fixed an issue on the Assign Users to Task page (Setup > Work > Projects > Project Edit > Task Edit > Assign) where the assigned resource ID and Functional Group values were wrapping on the page resulting in displaying overlapping text. The applied resolution was to set the proper width for the ID column.

TE-7547 Fixed an issue with the Project Budget tab (Setup > Work > Projects > Project Edit) where there was the inability to scroll down the Budget page as it is in Locked mode (read only). The applied resolution was modifying the design to allow scrolling through the page even with the tab being Locked.

TE-7685 Fixed an issue with the process of associating Forecasted Billing / Cost rates through the Project Team page where searching for rates required inconvenient navigation through additional search result pages.

TE-7968 Fixed an issue on the Project Team tab (Setup > Work > Projects > Project Edit) where all Soft Booked hours allocated to a resource were displaying under the Hard Booking column. The applied resolution was to apply the proper booking type filter in order to display the correct hours under the Hard Booking column.

TE-8507 Fixed an issue with the Project Tasks tab (Setup > Work > Projects > Project Edit) where changes made to the Task name on the Task Edit page, accessed from the Tasks tab, were not being reflected on the Task List table.

TE-8518 Fixed an issue on the Task Edit page, accessed through the Project Tasks tab (Setup > Work > Projects > Project Edit) where the Payable attribute flag was displaying even though the logged user has not been granted the cost license with their security profile.

Work Process

TE-8349 Fixed an issue with the Leave Requests Query (Entries > Leave Request > Leave Request List) where attempting to open an existing query to edit it, or create a new one, was resulting in a blank page being displayed.