Release Notes

Tenrox 2015 R1 Service Pack 4

November 2015

Tenrox by Upland Software

US & Canada:	1-877-4Tenrox
	1-877-483-6769
UK & Europe:	44 (0) 845 888 0999
Australasia:	1 300 698 620

info@uplandsoftware.com | www.tenrox.com | www.uplandsoftware.com

1045.11.13.2015.V1.EMD

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 4.

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:

- Corporate site: www.uplandsoftware.com
  www.tenrox.com
- Sales email: tenroxsales@uplandsoftware.com
- Customer care: tenroxcustomercare@uplandsoftware.com

Table of Contents

Introduction 5
Expenses *6*
Mobile *6*
Organizational Breakdown Structure (OBS) *7*
Work Breakdown Structure (WBS) *7*
Resolved Issues 8
Expenses *8*
Financials *8*
Integrations *8*
Log In *9*
Organizational Breakdown Structure (OBS) *9*
Reporting *10*
Resource Management *10*
Security *11*
Tenrox Mobile *11*
Tenrox Project Plan (TPP) *11*
Timesheet *12*
Work Breakdown Structure (WBS) *13*

Introduction

Upland Software is pleased to announce the release of:

Tenrox 2015 R1 Service Pack 4

Upgrade process: *Tenrox 2015 R1 SP4* 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

Expenses

TX-1457

Added the "Select Tasks using Browse in Detailed view" option in the Expense setup (Setup > Expense > System) that allows the selection of a Task on the Entry page (Entries > Expense Report > Expense Report List > Expense Entry Edit) to be done through a Browse listing. This option being or not being selected, combined with the selected setting of the "Can Select unassigned Tasks" Security Profile right will determine whether this new Task Browse listing will display.

- When the "Can select unassigned Tasks" right is granted, and the:
    - "Select Tasks using Browse in Detailed view" option is not selected, searching for tasks will be by auto-completing the form with paging within the selection.
    - "Select Tasks using Browse in Detailed view" is selected, the system will behave as it does today.
- When the "Can select unassigned Tasks" right is not granted, and the:
    - "Select Tasks using Browse in Detailed view" option is not selected, the system will behave as it does today.
    - "Select Tasks using Browse in Detailed view" is granted, the system will allow for browsing through the list of Assigned tasks of the originator.

Mobile

TE-7731

Attach Count Icon on Entry List Page

Introduced a count and paperclip icon to represent the number of attached receipts to an expense entry. If no receipts exist, no number and clip will be displayed. Once a receipt is attached, the paperclip will be displayed along with the number of attachments for that expense item.

TE-7746	Quick-Add of Receipt from Entry Page Introduces the Add Receipt option when viewing the details of an expense entry without needing to go through the entry wizard. Clicking the button will prompt the user to either take a picture or browse their gallery, and then attached the selected image to the expense entry. This decreases the click-through currently required for adding receipts to an entry.
TE-7785	Quick-Add of Receipt from Entry List Page Introduced a camera icon to allow for uploading a receipt directly from the expense report entry list page without needing to open the entry and go through the entry wizard. Clicking the camera will prompt the user to either take a picture or browse their gallery, and then attach the selected image to the expense entry. This decreases the click-through currently required for adding receipts to an entry.
TE-7786	View Receipts from List Page Introduces the ability to see all receipts attached to an entry without drilling into the expense entry itself. The paperclip icon introduced in TE-7731 is clickable and will display a thumbnail of all attached receipts. This new page will allow for zooming into an expense receipt, attaching new receipts, or deleting existing receipts attached to the entry.

Organizational Breakdown Structure (OBS)

TE-9035	Improved the wording of the Password Policy error message from "*Password can contain only alphanumeric and the special characters*" to now read "*Password must contain alphanumeric and special characters* ~@#$%^&*-+()..."_*".

Work Breakdown Structure (WBS)

TE-8406	Modified the display of Task names on the Assigned Tasks page, accessed through the Project Team tab (Setup > Work > Projects > Project Edit > Project Team), to now allow it to wrap in the Task Name (left) box.

Resolved Issues

This section lists resolved issues included in Tenrox 2015 R1 SP4

Expenses

TE-8667	Fixed an issue with Expense Entries where the modified selection made to the Site box was not being successfully saved when, after saving the change on the Entry Edit page, the Save is clicked on the Expense Report level. The applied resolution has corrected the update method behavior to also update the entry details at the Expense Report level.

Financials

TE-6947	Fixed an issue with Invoices where billable tips, that are included in an expense report, were being excluded when the "Apply client Tax Group when Invoicing Expenses" option is selected, which resulted in an inaccurate Invoice amount. The applied resolution was updating the invoice calculation procedure to include tips in the invoice amount, therefore the invoices that require correction must be regenerated in order for the amount to be recalculated accordingly.
TE-9087	Fixed an issue in Multi Client Invoice Manager where "Timeout" and "Service Unavailable" error messages were triggering upon attempting to create an invoice batch. The applied resolution required improving performance to better handle client PO association upon creating an invoice, calculation of taxes for each invoice, and listing of invoice batches.

Integrations

TE-8608	Fixed an issue with the CRM integration with Tenrox where client contacts were being imported from CRM to Tenrox despite settings in place to bar this from happening, including the disabling of the "CRM Users and Contacts Import automation" service and clearing of the Automatically Import Contacts option. The applied resolution corrected the condition on which the import contacts was based.

TE-9164 Fixed an issue with the MSP 2007 integration with Tenrox where attempting to publish a project from MSP 2007 to Tenrox was triggering an error. The applied resolution allows publishing successfully.

TE-8546 Fixed an issue with the QB integration with Tenrox where Vendors were not successfully exporting to QB when associated Payment terms do not have a QB integration ID. The applied resolution required modifying the stored procedure to allow a successful export even without an integration ID.

Log In

TE-8829 Fixed an issue with the Log in where a pervasive javascript error was triggering upon attempting to log in as a result of the user or login name containing an apostrophe. The applied resolution required modifying the handling of apostrophes contained in user or login name allowing for successfully logging into Tenrox.

Organizational Breakdown Structure (OBS)

TE-8380 Fixed an issue with the User Edit page (Setup > Organization > Users > User Edit) where, on changing the Master site to one associated with a Holiday Set with a name containing special characters, the special characters were not displaying properly. The applied resolution allows the proper handling of special characters included in a Holiday Set name.

TE-8577 Fixed an issue with budget-related automated email notifications where a user was receiving emails multiple times per hour regarding the complete consumption of the project budget. This was the result of the associated projects having been deleted causing the project budget notifications to be orphaned given there was no built-in cascading deletion of the given notifications. And, with the automation service turned on, the email notifications continued to be sent out. The applied resolution was to create the needed cascading deletion capability to ensure associated project notifications are automatically deleted when a project is deleted.

TE-8685 Fixed an issue with the email notifications where some special characters were not being properly handled resulting in them being replaced and showing as other characters in HTML-formatted emails. The applied resolution was to modify the procedure to ensure the special characters properly display on the HTML-formatted emails.

TE-8965 Fixed an issue with the exporting to excel of objects, such as Users and Tasks, where the exported values were showing on the spreadsheet having an added space at the end, specifically when they contain at least one numeric character. The applied resolution removes any addition of such a space.

Reporting

TCU-477 Fixed an issue with an RDL report where the Security setup disappeared, which was the result of two occurrence during the upgrade process: the security information not having been mapped correctly to the new table; and, the re-insertion of security profiles with new ID's were not correctly updated in the appropriate DB table. The applied resolution required DB corrections.

TE-7120 Fixed an issue with Ad Hoc reports where attempting to run a report was generating an unspecified error as a result of a large dataset. The applied resolution allows for the running of a report with sizable results.

TE-8835 Fixed an issue with Upland Analytics reports where the States of certain timesheets were not showing as a result of these specific timesheets being faulty. The applied resolution has the Timesheet States properly displaying on the Upland Analytics reports.

TE-8980 Fixed an issue with Ad hoc reports where running a User list report was producing inaccurate results excluding users with the Holiday Set to none. The applied resolution allows the users without an associated Holiday Set to be included in the results when running a Users List.

Resource Management

TE-8635 Fixed an issue with the Work Plan, in the Resource Management module, where the booking Role was being inadvertently cleared out when the User box was modified from having a selected User to opting it to be Set to none. The applied resolution allows the User box to be set to empty while maintaining the selected Role.

TE-8670 Fixed an issue with the Work Plan, in the Resource Management module, where the Bookings grid header was not properly aligning with the booking inputs in the Timeline boxes for the first bookings added. This resulted in the inability to navigate to what was set as the booking start date. The applied resolution has the grid headers correctly aligned when the Work Plan displays.

TE-8678 Fixed an issue in the Resource Management module where, contrary to the selected Email Notification option on the Workforce Planning page (Setup > Workforce Planning > System), there were no notifications being sent out, as expected, when a Hard Booking was removed from the Work Plan. The applied resolution has the Hard Booking removal notification sent out to the selected recipients when this option is selected.

TE-8966 Fixed an issue with the Work Plan, in the Resource Management module, where changing the selected application report, from the list box found at the upper right-hand side of the page, and then immediately clicking Back was resulting in the "Do you want to Discard changes?" prompt to appear, despite no changes were actually made. The applied resolution corrected the flagging of any report selection change as a change that requires saving.

Security

TE-8512 Fixed an issue with Security rights not being correctly applied when accessing the Project Tasks page through the Tasks link in the project Detailed view under Project Central. This resulted in a user without the appropriate rights to add/delete tasks. The applied resolution required enforcing the security profile rights to the Add/Remove buttons on the Project Tasks page.

Tenrox Mobile

TE-9296 Fixed an issue with Tenrox Mobile where there was the inability to create time entries through My Timesheet as the Task, Project and Client list boxes were unavailable. This was the result of specific Timesheet Template options having been set: "Display only Assignments with Time Entries" and "Display only Assignments with Time Entries in the previous period". The applied resolution is to display the assignments on creating a time entry in Mobile regardless of the options set on the Timesheet Template.

Tenrox Project Plan (TPP)

TE-8908 Fixed an issue in the TPP Gant view where the Billable flag was cleared after the "End Date" column was dragged and dropped immediately to the right of the Billable column. The applied resolution required adding a flag to keep any changes from being made while the Drag and Drop process is still running.

Timesheet

TE-8672 Fixed an issue with the Timesheet, in the Timesheet module, where the work types of the suspended and yet-to-start tasks were appearing in the Work Types list under the Assignment section. The applied resolution was modifying the procedure to only include, in the list, the Work Types for only active tasks.

TE-8679 Fixed an issue on the Timesheet Manager where approved timesheets were indicating “No Action Taken” on the Timesheet Approval Status details, which is accessed when hovering over the State of a timesheet. With entries made for Project Managers and the Approval Manager to review/approve, the timesheet was submitted and changed to a Project Manager assigned State. During the approval process, the Approval Group of the Timesheet owner changed to the same group to which the Project Manager belongs. As a consequence, upon attempting to recall the timesheet, it was erroneously moved directly to the Approved state, even though it had not actually been approved yet.

TE-8835 Fixed an issue in the Timesheet module where there were faulty timesheets that were not able to be resubmitted. These timesheets were rendered defective as a result of the required notes having been deleted after a Project Manager rejection occurred.

TE-9411 Fixed an issue with the Timesheet module where making a time entry for a Task, not already assigned, then creating another time entry against the same Task but having changed the attribute, then deleting the initial entry, and then clicking Refresh was resulting in the assignment to duplicate with the default assignment attribute. This was based on the Timesheet Template option “Display only Assignments with Time Entries” having been set. The cause of the issue was the improper filtering that was being done only at the attribute level in adhering to the Template option selected. The applied resolution required correcting the stored procedure to filter at the assignment attribute level instead.

Work Breakdown Structure (WBS)

TE-8825	Fixed an issue on the Tasks list page where attempting to sort the Tasks list based on any of the columns displayed was generating incorrect sorting results. The applied resolution required correcting the handling of the sort request.
TE-8965	Fixed an issue with the exporting to excel of objects, such as Users and Tasks, where the exported values were showing on the spreadsheet having an added space at the end, specifically when they contain at least one numeric character. The applied resolution removes any addition of such a space.
TE-9622	- Recognized Revenue of Actual Period should display 0 if Recognized Revenue of Actual Period Has NO Data (NULL), this logic should be respected for all Recognized Revenue option, IF ONLY “Display Recognized Revenue” is checked in Forecast Setting Template - Because Recognized Revenue of Actual Period has always some value , So Recognizable Revenue of All Actual Period = 0 - Because Recognized Revenue of Actual Period always has some value, so Deferred Revenue of All Actual Period will always calculated - Because Recognized Revenue of Actual Period has always some, Total Revenue of All Actual Period = Recognized Revenue