Release Notes

Tenrox 2015 R1 Service Pack 6

January 2016

Tenrox by Upland Software

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 6.

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 6

Upgrade process: *Tenrox 2015 R1 SP6* 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 SP6.

Tenrox Mobile

R&D#: TE-1871 *Issue #: N/A*	Added the ability to view notes attached to a time entry through both the My Timesheet and Assigned Timesheets pages. Clicking the Note icon on the Time Entry List will expand to show the notes associated to the time entry. The notes must be set as Public in order for them to be visible on the Assigned Timesheets page.

Work Breakdown Structure (WBS)

R&D#: TE-9824 *Issue #: N/A*	Added Financial Planner upgrade script fixes to the core Tenrox product: 1- Corrected order of Deferred Revenue and Recognized Revenue rows 2- Corrected row name of "Total Time PO" 3- Added the row "Billable Time POC"
R&D#:TE-925 *Issue #: N/A*	Improvements were made to better handle the multiple loading times of the Financial Planner when the values for the Non-Labor and Recognized Revenue cells are entered manually. The change now requires the refreshing of the page. Therefore, upon either the Non-Labor OR Recognized Revenue cells being entered manually, a dialog box will display, above the Financial Planner table, providing instructions to refresh the page by either clicking Refresh in the dialog box OR Refresh at the top of the page. The Financial Planner will ONLY load provided the page is refreshed, as instructed, otherwise it will not load.

Resolved Issues

This section lists resolved issues included in Tenrox 2015 R1 SP6

Entries

R&D #: TCU-483
Issue #: 9326

Fixed an issue with the Leave Request where the error message "*Unable to set an empty Time Entry. Please contact your Unknown administrator.*" was triggering upon attempting to approve the Leave request.

Expenses

R&D #: TE-8586
Issue #: 7227

Fixed an issue with Expenses where the Access Denied error was generating upon attempting to copy expense entries using the "Copy From this expense report" option. This was a result of the user having a security profile that is not granted the "Can Select unassigned tasks" right. Maintaining the security profile right as is, the applied resolution will show only the assigned tasks during the copying process.

R&D #: TE-9806
Issue #: 11895

Fixed an issue with Expense Reports where the date format for the Process Date column, of the Expense Report List, was displaying incorrectly.

Financials

R&D #: TE-9293
Issue #: 10268

Fixed an issue with Expense Payable Batches where cash advance expense item entries were being excluded from the payable batch, specifically when there are no other expense entry types within the same expense report. The applied resolution requires that any existing batches have to be regenerated, while any new ones will now correctly include cash advance entries.

R&D #: TE-9332 *Issue #: 10474*	Fixed issues with the Invoice Manager and Multi Client Invoice Manager where on generating an invoice, the client currency was being used, instead of the invoice currency. Moreover, on creating an invoice, when selecting a currency and/or company, neither the Rate to base currency nor the Rate to company currency were refreshing, as expected. The applied resolution required modifying the stored procedure, and having the rates properly refresh upon the currency or company being selected. In addressing any existing invoices, it is required that they be deleted and regenerated.
R&D #: TE-9757 *Issue #: 10149*	Fixed an issue with Invoice where all projects are being selected after adding a money charge to a newly generated invoice for which only one project had been specifically selected.
R&D #:TE-9726 *Issue #: 11732*	Fixed an issue with the Multi Client Batch Manager where the invoice batch template was not properly splitting the invoices based on the selected grouping options. The applied resolution allows the invoice batch to correctly generate invoices according to the chosen batch template settings based on account entries (time, expense, charge..) for the different tasks under the same project.

Home Page

R&D #: TE-8794 *Issue #: 8288*	Fixed an issue with the Home page where the count of the assigned timesheets, within the My Assigned Items frame, was not correctly corresponding to the actual number of assigned timesheets for the logged user who does not hold the Administrator security profile. The applied resolution has the displayed assigned timesheets number accurately representing the true count.

Integration

R&D #: TE-9652 *Issue #: 11234*	Fixed an issue with the QuickBooks Online Integration wherein each time entry for the same task in Tenrox, upon exporting to QB Online, were each being created as a separate line item. The applied resolution has the entries returned as summarized transactions in QB Online, therefore entries for the same task will roll up under one line item.

Mobile

R&D #: TE-10430 *Issue #: 35047*	Fixed an issue with Mobile where incorrect Expense Entries might be listed within an Expense Report. This was the result of a server side session management issue.

Organizational Breakdown Structure (OBS)

R&D #: TE-7771 *Issue #: 116993*	Fixed an issue with Roles Import where the import process was timing out when attempting to import a large number of records, and no log was being returned. The applied resolution required improving the process and frequency of the status request from the server for the import process.
R&D #: TE-10008 *Issue #: 20253*	Fixed an issue with the automation service wherein it was failing on attempting to run.
R&D #: TE-9899 *Issue #: 12148*	Fixed an issue with the workflow where the assignments precedence was not properly working.
R&D #: TCU-520 *Issue #: 12490*	Fixed an issue with the Automation Processing Options page of the Tenrox French site wherein some misspellings in the French translations were found.
R&D :TCU-498 *Issue #:*	Fixed an issue with the upgrade scripts where, on upgrading, data, containing French characters, were resulting in them getting corrupted. The applied resolution required changing the upgrade encoding and data files for specific streams.

Portals

R&D #: TE-9795 *Issue #: 11346*	Fixed an issue with Document Central where opening a document was impossible when the file name contains a special character.

Reporting

R&D #: TE-8571 **Issue #: 7184**	Fixed a performance issue with the Capacity by Role report where it was timing out on attempting to generate results, which was due to large amounts of data being retrieved. The applied resolution allows proper generation of the report regardless of the size of the data.
R&D #: TE-9008 **Issue #: 8424**	Fixed an issue with the Upland Analytics Reports where the Previous navigation arrow of the Calendar, for the Entry Date parameter, was not displaying. The applied resolution has the Calendar navigation arrows displaying as expected.
R&D #: TE-9009 **Issue #: 8423**	Fixed an issue with an RDLC Report where it was impossible to key-in the date for a date parameter. The applied resolution now allows the option to enter a date in any date box by either keying it in or making a selection from the corresponding Calendar.
R&D #: TE-9711 **Issue #: 11540**	Fixed an issue with OLAP wherein the Non-Working Hours Calendar measure was not pulling the values from the user's calendar as is the expected functionality.
R&D #: TE-9610 **Issue #: 9905**	Fixed an issue with the Detailed Invoice by Project/Task report wherein the Total was erroneously inconsistent with the invoice Summary Total shown on the generated Invoice.
R&D #: TE-9576 **Issue #: 11099**	Fixed an issue with Reports wherein a user granted security access to a folder was erroneously unable to see the reports within the given folder.
R&D #: TE-8459 **Issue #: 111623**	Fixed an issue with the Expense Application report, Detailed Personal Expense Report, where the expense Tax was saved incorrectly resulting in the report inaccurately displaying the value.
R&D #: TE-10120 **Issue #: 32764**	Fixed an issue with Upland Analytic Reports where customer-designed reports with UDF Data Sources were unable to run. This was a result of truncating Upland Analytics database tables.

Resource Management

R&D #: TE-8560 **Issue #: 7018**	Fixed an issue with the processing of Holiday Sets where Non-working holiday time entries were being created within associated users' timesheets that were outside the holiday date range. The applied

resolution corrected the processing to now have the holiday time entries be created on the proper dates.

R&D #: TE-9222 **Issue #: 9899**	Fixed an issue with the Work Plan where the list boxes were not properly filtering upon editing a booking. The applied resolution required modifying the condition for the list box so that it filters accordingly.
R&D: TE-10098 **Issue#: 32530**	Fixed an issue with the Work Plan where a server time out error was triggering due to a performance problem, which was a result of having had many bookings. The applied resolution required optimizing the Work Plan to allow the proper loading of the page regardless of the size of data.

Salesforce

R&D #: TE-8713 **Issue #: 7307**	Fixed an issue with the Salesforce and Tenrox integration where the "Project Payable Amount" KPI was not loading from the resource file. The applied resolution required correcting the mapping of the Salesforce "Project Payable Amount" to Tenrox.
R&D #: TCU-503 **Issue #: 11182**	Fixed an issue with the Salesforce and Tenrox integration where a notification was not generating, as expected, upon having exceeded the maximum number of allowable characters in an entry box. Moreover, deleting some characters and entering others, even within the allowable limit, was prohibited. This was due to the length of the Filter box under the CRM Advanced Options page not properly overriding the setting for the text box customized control. The applied resolution required changing the filter length to 4000.

Security

R&D :TE-8121 **Issue #:6951**	Fixed an issue with the upgrade scripts where any newly added menu option to the application, such as the Roles menu option, was only being added to the personalized User Menu once the " Override Global Settings" option had been cleared and then selected again.

Setup

R&D #: TE-9934 **Issue #: 12480**	Fixed an issue with the Workflow pages where the ActiveX was not installing automatically and was not working properly with the Tenrox Runtime installer resulting in the Workflow page displaying incorrectly.

Tenrox Project Plan (TPP)

R&D #: TE-9006
Issue #: 8972

Fixed an issue with TPP where the Work type was not successfully loaded as a result of no existing license for the Funded attribute in the environment wherein the Work Types were created, therefore the Funded attribute was saving with a Null value.

R&D #: TE-10203
Issue #: 33490

Fixed an issue with TPP where a non-working day notification, instructing to select another date, was repeatedly displaying, seemingly caught in a loop.

R&D #: TE-10063
Issue #: 24995

Fixed an issue with TPP where a task start date was erroneously being set on a non-working day and the time was being allocated time across the weekend.

R&D #: TE-10044
Issue #: 20275

Fixed an issue with TPP where the notification "*The Project End Date exceeds the End Date of the scheduling calendar. The Resource information must be updated.*" was inadvertently displaying repeatedly.

R&D #: TE-9875
Issue #: 12080

Fixed an issue with TPP wherein performance issues were occurring upon attempting to open a project.

R&D #: TE-9768
Issue #: 11708

Fixed an issue with TPP wherein there was the inability to approve an ETC change request.

Timesheet

R&D #: TCU-476
Issue #: 9322

Fixed an issue with Timesheet Adjustments where upon copying an adjustment entry row, then attempting to enter a corresponding time, was generating an error. This was the result of the Assignment ID having been incorrectly loaded in the Task list box upon the Adjustment having been copied. The applied resolution corrected the behavior to have the Task ID properly load for the Task list box.

R&D #: TE-9506 ***Issue #: 10014***	Fixed an issue with the Timesheet where the ETC box was not successfully saving a zero value entry, as after entering a zero and refreshing the timesheet the previous value would just redisplay.
R&D #: TE-9788 ***Issue #: 11622***	Fixed an issue with the Timesheet Workflow where modifications to the timesheet assignments were not saving successfully.
R&D #: TE-9706 ***Issue #: 11617***	Fixed an issue with the Timesheet where the My Work Types list was moving entirely to the left side of the list box upon an entry having been selected.
R&D #: TCU-551 ***Issue #: 8275***	Fixed an issue with Timesheet where the cursor was not automatically moving to the next cell upon having entered and saved an In/Out time in an entry cell. Moreover, upon entering a 1P In/Out time entry, it was being inadvertently changed it to 1:00 AM, while it should be PM.
R&D #: TCU-538 ***Issue #: 11631***	Fixed an issue with Timesheet where the Copy and Pasting of a time entry from one cell into another was not functioning as it should.
R&D #: TCU-512 ***Issue #: 11920***	Fixed an issue with Timesheet where an error notification was triggering upon attempting to delete a non-working time entry.
R&D #: TCU-511 ***Issue #: 9386***	Fixed an issue with Timesheet where a deadlock error notification was triggering upon two users attempting to submit their respective timesheet that included PTO.
R&D# : TE-10118 ***Issue#: N/A***	Fixed an issue with Timesheet under the Adjustments section where an error was triggering upon attempting to enter a negative–valued adjustment.

Work Breakdown Structure (WBS)

R&D # : TE-4161 ***Issue #: N/A***	Fixed an issue with the Task Edit page where the Functional Group column of the Assign Users to Task page was incorrectly displaying the Approval Group instead. The applied resolution was fixing the procedure to correctly show the Functional Group value.

R&D #: TE-9025
Issue #: 9186

Fixed an issue with the Client POs, accessed through the Client Edit page (Setup > Work > Clients > Client Edit), where the page was not loading due to corrupted data. The corruption was occurring when the Client-Invoice data was being imported into Tenrox. The applied resolution required running a script to correct the corrupted data and a DLL to prevent setting the incorrect data in the database.

R&D #: TCU-455
Issue #: 118463

Fixed an issue with the Financial Planner where an error was triggering, when attempting to override the Forecast setting at the project level, as a result of a stray null value having been returned due to a Role that was not successfully completely deleted from the database.

R&D#: TE-8583
Issue#: 7074

Fixed an issue with upgrading wherein the override option for the forecast rate that was set in the previous version was not being set in the same manner in the upgraded version.

R&D#: TE-9728
Issue#: N/A

Fixed a rounding issue in the Financial Planner wherein the Recognizable, Revenue Subtotal, and Total Cost at the Grand Total Level were not corresponding with the Available Budget (Billable /Cost).

R&D: TE-7543
Issue#: N/A

Fixed an issue with Project Cost Rules where changing the Effective End Date of an Hourly Cost Rule to "Open Ended" was not successfully saving as the date value was setting it to the current date instead.

R&D #: TE-9885
Issue #: 12171

Fixed an issue with the Project Financial Planner where categories and rows were being duplicated.

R&D #: TE-9874
Issue #: 12132

Fixed an issue with the Project Financial Planner where the forecasted manual entries were not successfully saving under the Current Baseline, but they were saved under Save Baseline.

R&D #: TE-9769
Issue #: 11321

Fixed an issue with the Task Mass Update where the selected task, on entry mass update, was not moving the tasks properly after navigating away from the first page of tasks.

R&D #: TE-9702
Issue #: 10962

Fixed an issue with the project creation where the page tabs were inadvertently loading before loading the main project page.

R&D #: TE-9447
Issue #: 6710

Fixed an issue with the Project Budget where the actual expense amounts were not applying the selected Client Apply Expense Markup option in the calculation. The applied resolution required including the selected amount type on with the expense markup is to be applied within the actual billable and cost expense calculations.

R&D #: TE-8739
Issue #: 6641

Fixed an issue with Task Edit page where the message requesting confirmation to update existing entries, after having made changes to the attributes, was not generating as is the expected functionality. Moreover, this issue occurred after the upgrade to Tenrox version to 2014 R3.

R&D #: TCU-455
Issue #: 118463

Fixed an issue with the Project Financial Planner where the error notification "*object reference not set to an instance of object*" was triggering when selecting to Override Template & Forecast Settings.

R&D #: TCU-453
Issue #: 118463

Fixed an issue with the Project Financial Planner where it was displaying incorrect values for a milestone project.

R&D #: TE-9632
Issue #: 11138

Fixed an issue with the Project Workflow where the project workflow was not successfully loading after having made a modification, which was the result of a conflict between its historical instance record and the new instance record. The applied resolution required deleting the historical instance records that no longer exist, which was the cause of the conflict, now allows the project workflow to display successfully after a change is made.

Work Processes

R&D #: TE-9501
Issue #: 10880

Fixed an issue with Work Processes where uploading any file as an attachment was impossible due to their extensions having contained capital letters.

R&D #: TE-4322
Issue #: 91648,
92493,108555,
110551,112701,
116881

Fixed an issue with Leave Requests where approving a Leave Request resulted in the duplication of the corresponding time entry. This was occurring when the approver mistakenly or inadvertently closed the Leave Request page before being able to actually approve it. But, even with it still being in the Submitted state, a non-working time entry was nonetheless created. However, on reopening the request page again and actually approving it, the non-working time entry was duplicated. The applied resolution required adding a validation wherein upon a leave request being approved there is verification of any existing non-working time entries associated to the given leave request and if so it will be deleted and another one created, eliminating any possible time entry duplication.