



Tenrox Release History



January, 2012

About this Guide

This guide provides a high-level description of the new features and improvements in the Tenrox software. The features and improvements are listed by Tenrox release.

Tenrox 2011 R3: December 2011

Tenrox 2011 R3 requires the use of Internet Explorer (IE) version 7.0 or higher to access the following features:

- Workflow Designer
- Accounting and Microsoft Project integrations, as well as Excel data imports
- OLAP charting and printing of Microsoft reports (RDLC)
- Credit card transaction file imports
- Tenrox project planning (Gantt charting tool)
- Calendar edits

Note: The listed features are not supported in the Tenrox application when using non-IE Web browsers, such as Firefox, Chrome or Safari.

Tenrox 2011 R3 Feature Set	
Feature	Description
Timesheet	
Previous and Next Arrow Functionality	This feature allows users to move forward or backward depending on the period dates specified in Timesheet Manager.
Minimum Hours Enforced for Weekdays	This feature allows a minimum of hours to be enforced on a per day basis for weekdays in the timesheets.
Selecting the Days Displayed in the Timesheets	This feature allows the visibility of individual days in the timesheets to be toggled on or off.
Expense	
Automatic Detail Expense Work View	This feature allows users to immediately fill out required fields based on selected Items while using the expense work view.
Printing Attachments in Expense Reports	This feature allows all Entry attachments to be printed from a single location in the expense reports when using the Detailed Expense View.
Salesforce Integration	
Salesforce Integration	This feature allows criteria to be defined for importing projects from Salesforce, updating and deleting projects, opportunities and cases in Salesforce, as well as creating customizations.
SharePoint Integration	
SharePoint 2010 Workspace Collaboration	This feature allows Self Provisioning Portal (SPP) 2010 support.
Tenrox Project Plan (TPP)	
WBS Code Field Added to the Project Planning Tool	This feature allows the tracking of WBS codes for tasks and also allows project managers to display the codes in the project planning task views.
Printing Notes from the Project Planning Views	This feature allows the printing of task and resource notes when a view is printed in the project planning application.

Reports	
Ad Hoc Report Charting	This feature allows the creation of chart reports using the Ad Hoc Views.
Ad Hoc View Field Additions and Work Process View	This feature introduces the Company and Id fields to some existing views, as well as the new Work Process View, to allow users to build and run reports on the different work process entries in the system.
Capacity Forecasting Report	This is a new report in the Resource Management Report folder that displays the total commitment of all resources when the Resource Group and Period Type (Quarter, Monthly, Weekly, Daily) is selected and also color codes the commitments
Collaborative Workforce Planning (CWP)	
CWP Notifications	This feature allows the setup of notifications for users added to the Work Plans.
Financial Module	
Great Plains 64-Bit Support	This feature allows the set up of the currency mapping for Great Plains integration through the Web application and introduces support for Great Plains with a 32-bit installation on a 64-bit machine.
QuickBooks 2012 Support	This feature allows the support of QuickBooks Desktop 2012 Enterprise Version (US and CAD).
Revenue Management	This feature allows the definition of schedules based on which revenues are recognized.
Revenue Batch Export to Great Plains	This feature allows the export of revenue batches as Journal Entries into Great Plains.
Entry Revenue Recognition Schedule	This feature allows the definition and override of recognition schedules at the milestone, charge entry and product entry levels.
Item Revenue Recognition Schedule	This feature allows the definition of recognition schedules at the charge item and product item levels.
Milestone Completion Type Default Change	The Completion type for milestones is changed to default to stage instead of date.
Enable ETC Flag on Tasks by Default	The Enable ETC option is selected when a new task is created by default.
Printing Attachment in Invoice and Invoice Batches	This feature allows all invoice or invoice batch attachments to be printed from a central location.

System	
User-Defined Fields Added to Portfolios	This feature allows users to assign user-defined fields to the Portfolios.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Project Security	This feature allows multiple users, groups and security profiles to be added to the project security simultaneously.
Project Team Time Fields	This feature introduces Project Fields to the templates to allow users to access clients, projects and tasks on timesheets for the projects on which they are a team member.
Project Time Field Display Name	This feature introduces the ability to change the display name of Project Fields displayed in the timesheets.
Exports to Excel	This feature introduces the ability to export the currently viewed list of Work Processes to Excel.
Work Plan Notes	This feature allows the addition of notes in the project, group and user work plans against the commitments of users in projects.
Unsuspending Tasks when Projects are Unuspended	This feature prompts users to unsuspend tasks when projects are unsuspending.
Unsuspending Projects when Tasks are Unuspended	This feature automatically unsusponds a project when a task belonging to it is unsuspending.
Hiding Projects in Work Plans	This feature changes the automatic display of projects in work plans: Projects will only display on the Work Plan table as long as the viewing date range contains at least one day that falls on or between the Project Start and End dates.
General	
Error Message Display	This feature will replace the technical error messages caused by certain application errors with a more standard message.

Tenrox 2011 R2: September 2011

When using Microsoft Internet Explorer (IE) Web browsers, the following features of the Tenrox application require IE Web browser version 7 or higher:

- Workflow designer when used by an administrator to create or modify the workflows
- Tenrox connectors, such as all accounting integrations and Excel data imports, as well as Microsoft Project integration
- OLAP charting and printing of Microsoft reports (RDLC)
- Credit card transaction file imports
- Tenrox Project Planning (Gantt charting tool)

Note: When using non-IE Web browsers, the features listed, as well as the Calendar Edit area, of the Tenrox application cannot be accessed.

Tenrox 2011 R2 Feature Set	
Feature	Description
Timesheet	
Timesheet Period Closed Indicator	This feature will display Period Closed in the Action box for timesheets that fall within a period that is closed.
Expense	
Expense Receipt Preview	This feature will allow users to attach documents from the Expense Entry Edit page by clicking attachment link and preview an attached image file.
Tenrox Project Plan (TPP)	
TPP Changes for Completed Tasks	This feature will allow users to complete synchronized tasks without entering time entries in Tenrox (tasks are set to completed in the Tenrox Project Plan).
Microsoft CRM Integration	
MS CRM 2011 Support	This feature will allow on-site premise support of the Microsoft CRM 2011 solution (MS CRM 5); support for the cloud-based CRM 2011 solution is not currently available.
General	
Menu Bar Collapse/Expand Functionality and Logged User Display	<p>This feature will display the following:</p> <ul style="list-style-type: none"> • Menu collapsed by default and state (collapsed/expanded) is retained in the client-side cookie • Help, Settings and Log Off buttons are combined to streamline and improve the menu bar display • Name and security role of the logged user is displayed on the menu bar

Tenrox 2011 R1: May 2011

For the Tenrox 2011 R1 release, the following areas of the application cannot be accessed using non-Internet Explorer (IE) Web browsers:

- Workflow setup
- Accounting integration
- Expense transaction import
- Data import
- OLAP charts
- Calendar Edit

Tenrox 2011 R1 Feature Set	
Feature	Description
Timesheet	
Timesheet Assignment Status	This feature will display the approval status of the projects in an information box when the pointer rests over the state of a Timesheet in the Project Manager approval state.
Timesheet Manager Message	This feature will display a message in the grid to inform users that there are no Timesheets matching the search criteria when there are no Timesheets available in Timesheet Manager.
Timesheet Manager View Changes	This feature will allow defining the start of the week when the option This week, Last week or Weeks in the past is selected.
Project Time Entry Notes	This feature will allow defining whether the time entry notes are required, not allowed or optional at the Project and Task levels.
Six-Minute Time Span Support	This feature will allow the entering of time in six-minute increments.
Expense	
Default Expense Item	This feature will force users to select an item when creating a new expense entry by setting the Expense Item field to Please Select by default.
Expense Assignment Status	This feature will display the approval status of the projects in an information box when the pointer rests over the state of an Expense report in the Project Manager approval state.
Expense Reimbursable Rate Calculation	This feature will allow users to enter the reimbursable amount of an expense entry and have the system reverse calculate the exchange rate.
Expense Report History	This feature will display the Expense Workflow history in the Expense report.

Payable Batch User Amount in Base Currency	This feature will display the total amount per user in the base currency.
Payable Batch Document Date	This feature will allow defining a document date for the expense payable batch.
Non-Taxable Expense Entry	This feature will allow the hiding of tax-related fields on the expense entry page when a non-taxable expense item is selected.
AMEX Changes	The AMEX folder location will now be defined through the Server Administrator.
Tenrox Project Plan (TPP)	
TPP Save Local Project with Actual Values	This feature will allow users to save actual values (project progress) when saving a project plan as a local file.
TPP Week Date Display in Charts	This feature will display the start date of the week in Chart view when the view zooms into the week level (as opposed to displaying W1, W2...).
TPP Local Assignment Progress	This feature will track actual work directly in Tenrox Project Plan for local resource assignments.
TPP Split Views	This feature will allow users to quickly view and modify items in Tenrox Project Plan through a split pane without having to open additional views.
TPP Printing and Page Setup Settings	This feature will allow users to select which part of the view to print: the Chart, the Table or both.
TPP Budget Mapping	This feature will maintain cost and billing budgets defined in Tenrox when publishing a project from Tenrox Project Plan.
TPP Budget Security	This feature will prevent users without Budgeting rights in Tenrox to create budgets when publishing a project from Tenrox Project Plan.
Client Mapping from TPP	This feature will allow defining the project client from Tenrox Project Plan.

Reports and Centrals

Report Cleanup	<p>This feature will allow the following:</p> <ul style="list-style-type: none">• Removing XML reports• Adding new reports• Modifying certain reports
Reporting User Interface (UI) Changes	<p>This feature will allow the following:</p> <ul style="list-style-type: none">• Replacing the existing Reports tree with a list view• Structuring the reports under the tabs• Creating and sharing the custom tabs
OLAP Pivot	<p>This feature will allow the redesign of the OLAP pivot reporting.</p>
Ad Hoc Reporting Changes	<p>This feature will allow the following:</p> <ul style="list-style-type: none">• Simplifying the definition of custom display names for the report fields and filters• Showing or hiding the Report title at runtime• Improving the user interface at runtime
Ad Hoc View Changes	<p>This feature will allow the following:</p> <ul style="list-style-type: none">• Displaying Invoice, Payroll and Payable Batch numbers from the Ad Hoc reports• Displaying Project Workflow information from the Ad Hoc reports• Adding new Project PO and Milestone categories• Splitting the Leave Time category into two separate categories to simplify reporting
OLAP View Changes	<p>This feature will add Portfolio information to the existing Project cubes and views, as well as remove Portfolio specific cubes and views.</p>
Project Central Changes	<p>This feature will allow modifying the Project Central page to:</p> <ul style="list-style-type: none">• Offer multiple tabs• Display a new Project list grid
Data Access	<p>This document outlines the data available to users from the Centrals and the Report pages.</p>

Work Breakdown Structure (WBS)	
Project Workflows	This feature will allow the merging of the project initiation and project execution within a single workflow driven project object.
Project Setup Redesign	This feature will allow viewing the Project Setup page as a list with configurable details to be displayed.
Project Edit Redesign	This feature will allow for the following: <ul style="list-style-type: none"> • Reorganization of the General tab of the Project Edit page • Association of a project to a single Portfolio.
Portfolio Changes	This feature will allow modifying the Portfolio to add the following: <ul style="list-style-type: none"> • Notes • Documents • Project Workflow
Removal Phase Override Attributes	This feature removes the functionality to override entry attributes at the Phase level
Project Override Attribute Logic	This feature will allow applying the Project level attribute override settings to Time Entries, Charge Entries, Product Entries and Purchase or Requisition Entries.
Financial Module Changes	
Financial Setup Reorganization	This feature will allow moving all the financial entry pages (Invoice Manager, Multi Client Invoice Manager, Expense/Purchase Payable Batch, Credit Card Transactions, Payroll, WIP Accrual Manager) from the Financial Setup pages to a new Financial menu.
Invoice Money Charge Creation	This feature will allow creating money charges directly from the Invoice.
Collaborative Workforce Planning (CWP)	
Committed Hours on Non-Working Days	This feature will allow setting user calendar days as non-working even if committed hours are entered on those days.

General	
Outlook Integration	<p>This feature will add the following functionality:</p> <ul style="list-style-type: none"> • Ability to export assignments as Outlook Tasks and/or Appointments • Ability to export approved Leave Requests as Outlook Appointments
User List Redesign	<p>This feature will allow the following:</p> <ul style="list-style-type: none"> • Adding the number of licensed users to the User Setup page • Making the User grid configurable
Charge and Product Entry List Redesign	<p>This feature will update the Charge and Entry List grids to a .NET grid for a more uniform look across the application.</p>
Failed Notification Addition	<p>This feature will allow adding the Failure Date to the Failed Notifications grid.</p>
Project Initiation Integration Cleanup	<p>This feature will remove the Project Initiation Workflow and any integration to it from Salesforce or CRM.</p>
Document Upload Changes	<p>This feature will move the internal document upload setup to the Server Administrator.</p>
System Cleanup	<p>This feature will remove the Edit, Rename, Notes and Documents options from the tree context menus.</p>
64-Bit Client and Server Support	<p>Support of 64-bit machines.</p>
Non-IE Browser Support*	<p>Support of Firefox, Chrome, and Safari browsers.</p>

* Specific areas of the application, such as workflow setup, accounting integration, expense transaction import, data import, OLAP charts and Calendar cannot be accessed using non-Internet Explorer (IE) Web browsers.

Tenrox Summer Heat 2010: August 2010

Tenrox Summer Heat 2010 Feature Set	
Feature	Description
Timesheet	
Timesheet Manager Custom Views	This feature allows a user to create custom timesheet manager views based on specific criteria.
Timesheet Manager Next & Previous	This feature will allow navigating across timesheets in the Timesheet Manager without having to open each timesheet individually.
Timesheet PM Auto-Approval	This feature will allow automatically approving time for projects without requiring action by the project manager.
Timesheet Resubmit Date Restriction	This feature will allow overriding the time entry date restriction when resubmitting a timesheet.
Addition of My Teams to Timesheet	Introduces the ability to have a filtered list of user's teams on the timesheet and be able to report time against it.
Punch Timesheet	Introduces the ability to punch in/punch out through the In/Out section of the Timesheet.
Expense	
Expense Report Copy Enhancements	This feature makes the Expense Report Copy feature more intuitive.
Addition of Payment Methods	This feature adds Diners Club and Discover as available payment methods.
Expense Required Field Popup	This feature will allow displaying a message and highlighting entries with missing required fields on Expense Entry save and on Expense Report completion.
Expense Resubmit Date Restriction	This feature allows overriding the expense entry date restriction when resubmitting an expense report.

Tenrox Project Plan (TPP)	
TPP Duration and Date Changes Logic	This feature redefines the logic to be used in TPP when task/assignment dates or durations change.
Suspended Projects in Tenrox Project Plan	This feature will allow: <ul style="list-style-type: none"> • Displaying suspended projects in red font on the Enterprise Project List screen • Adding a new checkbox to the Enterprise Project List screen to show active projects only
Reports and Dashboards	
Report Cleanup	Most XML reports were converted to RDLC, new reports were added.
Ad Hoc Skills Reporting	This feature introduces reporting on Skills and Skill Sets in the Ad Hoc reports.
Report Favorites and Recently Viewed	This feature will allow having quick access to the favorite reports and most recently previewed reports through the Reports tree.
Report Search	This feature allows searching for reports through the Quick Links menu.
Financial Module Changes	
Include Project in Invoice	This feature gives the option of defining whether a Project can be invoiced.
Invoice PM Approval	This feature allows implementing Project Manager approval in the invoice workflow.
Invoice Rejection Note	This feature allows entering a note when rejecting an invoice.
Work Plan Copy	This feature allows also copying the Work Plan of a Project when copying the Project.
General	
Search Enhancements	Added search capabilities on commonly used setup pages. Also enabled triggering search by hitting enter instead of having to click the Find button.
Left Pane Menu Redesign	The UI of the application has been updated.
Regional Settings Support	This feature adds support for the YYYY-MM-DD date format.
User Decommission Termination Date Link	This feature allows setting the user's termination date automatically when a user is decommissioned.

Tenrox Winter Ice 2010: February 2010

Tenrox Winter Ice 2010 Feature Set	
Feature	Description
Timesheet	
Timesheet Adjustment Section	This feature introduces a new Adjustments section to the Timesheet from where users can create time charge entries against project and leave time tasks.
Time Charge Changes	This feature allows giving a time charge entry all the same attributes possible for a time entry.
Collaborative Workforce Planning (CWP)	
Generic Resource in Group Work Plan	This feature will allow viewing/replacing Generic Resources in the Group Work Plan.
Generic Resource Availability Changes	This feature will allow optionally reflecting the generic resource commitment in its availability.
Excel Skill Import Changes	This feature will allow importing Skills, Skill Sets and Skill Associations to Users through the Excel import tool.
Tenrox Project Plan (TPP)	
TPP CWP Integration Enhancements	Highlights include the ability to replace generic resources in TPP and the notification to Resource managers when a generic resource is requested through TPP.
Assignment Change Request	This feature allows a user to request a change to their TPP assigned tasks from Tenrox and for the Project Manager to import those requests into TPP and decide whether to approve the change requests directly from TPP.
Reports and Dashboards	
PM Task List Redesign	This feature will allow redesigning the Project Manager Task List web part to use the new grid control.

Financial Module Changes	
Invoice Time Adjustments	This feature allows the creation of time adjustments directly from the Invoice.
Invoice Generation Automation	This feature will allow generating the invoices for an Invoice Batch through the automation services.
WIP Integration with Great Plains	This feature permits the export of WIP Accrual Batches to Great Plains.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Project PO Security	The addition of a security component now allows defining access to the Project PO feature.
MSP 2007 Export	This feature will allow exporting a project plan from MS Pro 2007 to Tenrox and updating the project plan in MS Pro 2007 with actuals from Tenrox.
Budgeting	
Budget Import	This feature allows importing project, task and assignment budgets into Tenrox through an Excel import template.
System	
Task Grid Changes	This feature will allow configuring the data displayed in the Tasks grid.
UI Enhancements	All Application grids have been standardized and general usability improvements have been made.
Project Manager Approval in Work Processes Improvements	This feature will allow redirecting the pm assignment of a work process entry to the approval group manager when no project manager exists.
Document Audit Trail	This feature allows auditing document attachments.

Tenrox Summer Heat 2009: August 2009

Tenrox Summer Heat 2009 Feature Set	
Feature	Description
Timesheet	
Timesheet Phase 3	This feature adds further functionality to the Timesheet Templates.
Tenrox Desktop	This feature allows offline access to Timesheets and Timesheet Template technology.
Expenses	
Expense Report List View	This feature filters the My Expense Reports list by creator/originator.
SharePoint Integration	
SharePoint Project Workspace	This feature creates a SharePoint workspace through the Tenrox project creation process.
Tenrox Project Plan (TPP)	
TPP CWP Integration Enhancements	This feature adds more functionality to the integration between TPP and Tenrox.
Reports and Dashboards	
Ad Hoc Reporting Phase 3	More reporting views and more functionality have been added to the ad hoc reporting functionality. The ability to filter reports on aggregate fields is also introduced.
Calendar View	This feature allows users and managers to view scheduled tasks and time off in a calendar view.
Project Milestone View	This feature allows users to view a list of projects and their milestones in a web part.
Client Portal	This feature introduces new client-specific web parts to the dashboards.
Portfolio and Project View Changes	This feature introduces new budgeting fields to the Portfolio and Project views.
Outlook Mash-up	This feature permits the viewing of Tenrox bookings and Outlook bookings within a single calendar view.
Leave Time	
Leave Time Processing Enhancements	This feature sets up date-based leave time processing rules enabling simultaneous reset and accrual rules, seniority accrual rules and period-independent processing.

Financial Module Changes	
Pre-Billing Invoice Approval	This feature creates a pre-billing approval work process entry directly from the invoice, allowing the client to review and approve the invoice data before issuing it.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
OBS Mass Update	This feature gives the user the ability to perform mass updates on OBS objects.
Task Milestone Mapping	This feature associates tasks to milestones to promote better reporting.
Entry Mass Update	This feature allows mass updating time, expense, charge and product entry attributes.
Budgeting	
Detailed Budgeting	This feature creates a detailed time and detailed cost and billing budget for time, expense, charge and product entry and allows setting up notifications for each.
System	
UI Enhancements	Further enhancements to the user interface for quicker and easier access to information. Focus has been placed on enhancing the user experience by promoting an intuitive navigation and reducing the number of steps required to perform tasks.
Workflow Viewer	The Workflow Viewer now uses Silverlight technology, and allows viewing of more detailed assignment information.
Automation Options Changes	This feature displays the date and status of the last process.
Client Login	This feature defines a custom menu for client contacts, and associates client contacts to dashboard and report securities.

Tenrox R10.1: February 2009

Tenrox R10.1 Feature Set	
Feature	Description
Timesheet	
Timesheet Phase 2	This feature adds further functionality to the Timesheet Templates.
Timesheet PM Approval	This feature allows project managers to approve/reject their part of the timesheet while other project managers may have rejected their part.
Timesheet Manager Phase 2	This feature requires security to review a Timesheet before changing its state and for mass approving and/or rejecting of Timesheets. Additionally, a new Timesheet Administrator view will be added to the Timesheet Manager.
Expenses	
Single Project Expense Report	This feature allows enforcing the creation of entries against a single project per expense report.
Expense Report Template	This feature allows using existing expense reports as templates when creating new expense reports.
Expense Task/Work Type Filter	This feature allows limiting the creation of expense entries to Tasks having the Used by Expense option selected.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
User Group History	This feature introduces the ability to change a user's functional group history in the past and in the future.
Milestone History	The ability to track all changes made against project milestones.
Tenrox Project Plan (TPP)	
TPP Mass Update and Search	This feature performs mass updates on tasks and resources and searching on the resource and work type screens.
TPP Tenrox Project Date Mapping	This feature allows setting the project start and end dates in Tenrox to the earliest/latest dates between the project's tasks' dates and any commitment dates.
TPP CWP Integration Changes	This feature allows fully utilizing a resource's availability when committing from TPP and allows determining when a resource is overloaded/over allocated on any given day within the project.

Reports and Dashboards	
Ad Hoc Reporting Phase 2	More reporting views and functionality has been added to the ad hoc reporting functionality.
Report Security	This feature allows assigning users, groups and security profiles to report security.
Dashboard Security	This feature allows a User to see all Dashboards to which they are assigned as a user (or as a member of a group or security profile).
Leave Time Calendar	This feature allows a group manager to view leave requests of their subordinates and a project manager to view leave requests for their project team.
Invoice Batch Display Area	Introduces the ability to add reports to the Invoice Batch page and allows reporting on Invoice Batches as a whole.
Collaborative Workforce Planning (CWP)	
Project CWP Work Plan Shift	This feature allows automatic shifting of the project schedule when project dates are updated in the Project Based CWP module.
Project CWP Work Plan UI Changes	This feature reduces visual clutter on the Work Plan pages by hiding any zero amount entries.
Project Work Plan Refresh	The data is now refreshed in the project work plan without having to close and reopen the project edit page.
Financial Module Changes	
Invoice Notes and Documents	You can now enter notes and documents for an invoice.
Cost and Billing Rule Association	This feature introduces the ability to mass associate cost and billing rules to users.
Email Invoice Report	This feature sends the client an email with an attachment of the invoice report in PDF format.
QuickBooks Online Integration	Certified integration with the newest QuickBooks version: QuickBooks Online.
Payable Expenses in Payable Batch	This feature allows the inclusion of payable but not reimbursable expense entries in the payable batch and the export of the entries against the payment method vendor.
Leave Time	
Leave Request Enhancements	This feature introduces a simplified and more visually-appealing user interface for the Leave Request form.
Work Process	
Work Process Setup Changes	This feature allows further configuring the work process entry page.

System	
User Defined Field Changes	This feature allows displaying a browse type user defined field as a browse field or as a combo-box.
Password Reset	This feature introduces password hashing for enhanced security and allows a user to have their Tenrox password reset when they have forgotten it.

Tenrox R10: October 2008

Tenrox R10 Feature Set	
Feature	Description
Timesheet	
Timesheet Template	This feature creates custom Timesheet views.
Timesheet Approval	This feature allows partially approving a Timesheet in the project manager approval process.
Overtime Process Redesign	This feature will introduce the flexibility required to better control the behavior of the overtime processing rules.
Expenses	
Apply Client Tax on Expenses when Invoicing (VAT)	This feature will offer the ability to apply client taxes on the expense entries come invoice time.
Charges and Products	
Charge and Product Approval	This feature allows approving charge and product entries through user assignments.
Product Entry Currency	This feature allows defining a cost currency for a product entry.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Project Security	This feature allows defining the check in/check out and view rights on a project for selected users in the Tenrox Project Plan module.
Project Copy	This feature allows using existing projects as templates for creating new projects.

Tenrox Project Plan (TPP)	
Integration with CWP module	This feature allows importing committed resources from Tenrox into TPP and importing a Project Work Plan from TPP to Tenrox.
Enterprise version	This feature allows working with TPP in an offline mode and allows collaborating on projects while in online mode. It allows locking project plans for edit and viewing them in read-only mode.
TPP Baselines	This feature allows the creating, updating and deleting of project baselines in TPP.
Reports and Dashboards	
PSR Export	This feature allows exporting the Project Status Report (PSR) report to Excel.
Project View	This feature allows displaying project-relevant data in a web part.
Ad Hoc Reporting	This feature allows creating custom reports based on data views provided out-of-the-box.
Collaborative Workforce Planning (CWP)	
Task Based Resource Planning	This feature allows scheduling resources against a project at the task detail level.
Project Work Plan Notifications	This feature allows notifying resources when they have been added to or removed from the project work plan.
Financial Module Changes	
Revenue Recognition module	This feature calculates the work in progress for ongoing projects.
Unearned Revenue	This feature allows accounting for unearned (deferred) revenue.
Tenrox Mobile	
Tenrox Mobile	This feature accesses the Tenrox Timesheet and Expense modules through a mobile device.
Tenrox Desktop	
Tenrox Desktop	This feature allows accessing the Tenrox Timesheet and Expense modules through a desktop application.

Base System Changes

UI Redesign	A complete overhaul of the Tenrox interface introduces a new look and feel to the application.
Unicode Support	This feature supports double byte languages across the application for data entry and reporting.
Batch Service Redesign	Greatly improves the stability, performance and error handling of the batch service using .NET.
Server Administrator Redesign	This feature supports Windows 64x and improves the server management.
Workflow Engine Redesign	Timesheet workflows have been redesigned to use the Microsoft Workflow Foundation.
Email Notification Redesign	This feature greatly improves the dependability and robustness of email notifications.
Single Sign-on	This feature allows authentication of the Tenrox logon against the Customer directory services using a web service.

Tenrox R9.2 SP1 Feature Set	
Feature	Description
Timesheet	
Recall Enhancements	This feature recalls a Timesheet not yet approved (even if some entries within the timesheet are approved).
Expense	
Total Amount Reimbursed	This feature displays the total amount reimbursed on the Expense Report page.
Expense Entry UI Changes	This feature minimizes the number of clicks required to create an expense entry.
Expense Report UI Changes	This feature displays the name of the expense report originator on the expense report.
Email Expense Rejection Note	This feature includes the rejection note in the Expense Rejection notification email.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Project Team	This feature defines a project team with specific forecasting rates, actual rates, commitments and assignments.
Project UI Enhancements	This feature enhances the look and feel of the Project Edit page.
Task Name Update	This feature automatically updates Task Names when the Project Code changes.
System Changes	
Bookmark	This feature prompts the user to add the Tenrox URL to the browser's Favorites list.
Logon Changes	This feature saves the user logon name and password to avoid having to enter it each time a user visits the logon page.
Reports	
RDLC Report	Migration of certain XML reports into RDLC.
Dashboards and Web Parts	
Portfolio View	This feature views specific project data by portfolio.

Tenrox R9.2 SP1 Feature Set	
Feature	Description
Timesheet	
Recall Enhancements	This feature recalls a Timesheet not yet approved (even if some entries within the timesheet are approved).
Expense	
Total Amount Reimbursed	This feature displays the total amount reimbursed on the Expense Report page.
Expense Entry UI Changes	This feature minimizes the number of clicks required to create an expense entry.
Expense Report UI Changes	This feature displays the name of the expense report originator on the expense report.
Email Expense Rejection Note	This feature includes the rejection note in the Expense Rejection notification email.
Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Project Team	This feature defines a project team with specific forecasting rates, actual rates, commitments and assignments.
Project UI Enhancements	This feature enhances the look and feel of the Project Edit page.
Task Name Update	This feature automatically updates Task Names when the Project Code changes.
System Changes	
Bookmark	This feature prompts the user to add the Tenrox URL to the browser's Favorites list.
Logon Changes	This feature saves the user logon name and password to avoid having to enter it each time a user visits the logon page.
Reports	
RDLC Report	Migration of certain XML reports into RDLC.
Dashboards and Web Parts	
Portfolio View	This feature views specific project data by portfolio.

Collaborative Workforce Planning (CWP)

Resource Load Report	This report displays a resource's available hours and committed hours.
Calendar Update from Leave Request	This feature allows updating the user's calendar once their Leave Request has been approved.

Tenrox Project Plan (TPP)

Task Synchronization Flag	This feature allows determining the synchronization of particular Tasks from TPP to Tenrox.
TPP Assignment Progress Display	This feature displays the actual work and % Work Complete per assignment on the Schedule Chart.

Tenrox R9.2 Feature Set	
Feature	Description
Timesheet	
Flag Billable Entries	This option flags all billable entries on the timesheet to distinguish entries with billable components.
Force Note for Billable Entries	This option forces the entry of a note for every time entry that is flagged as billable.
Show earliest assigned timesheet	This option will enable the user to see the earliest/ first open timesheet when they logon to the system. The main goal of this option is to automatically navigate to the earliest timesheet that needs to be submitted without the need to manually scroll to that timesheet.
Exclude users from Timesheet notifications	This option allows some resources to be excluded from reminders and/or notifications. This option is especially useful for executives or exempt employees that only need to log in exception time.
Recall Timesheet	This option allows users to recall a Timesheet that has been completed but not yet approved.
View Project Manager Name from Task Summary	This enhancement adds the project manager's name to the task information screen that can be accessed by users in the Timesheet summary view.
Email Timesheet Rejection Note	This feature extends the rejection email to include the rejection note.
Color picker for ETC	Users can select a background color for the ETC cell on the Timesheet.
Set default timesheet view to Work view	User's default Timesheet view will be set to the work view.
Non-Working time section of all timesheets displayed as a drop-down	The non-working section of the timesheet will now offer a drop-down with all leave time tasks available.
Note displayed on summarized timesheet when there are no assignments	A note will be displayed on the summarized timesheet to notify the User that there are no assignments.
Addition of Day Unit to the Timesheet	This feature allows the user to enter time in the form of days.
Addition of Percentage Unit to the Timesheet	This feature allows the user to enter time in the form of percentage.

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Timesheet Manager	
Add Resource Type to filter	This option adds the resource type as a new search criterion to the search drop down list in the Timesheet manager page.
Add reporting options	This option enables any report of type "Time Manager" to be accessed by the Timesheet manager page.
Show earliest period for Timesheet approval	This option automatically displays the earliest period with a Timesheet that requires approval when the user accesses the Timesheet Manager without the need to navigate to this period manually.
Disable Approve All for Timesheet	This option prevents managers from approving all timesheets in one shot (through the approval check box on top of the Timesheet Manager grid).
Force opening Timesheet for approval	This option will force the project manager to open each timesheet individually and review its entries before taking action on it (approving or rejecting).
Expense Reporting	
Option to filter expense task list to User's assigned tasks	This option limits user's access to the list of assigned tasks for expense reporting purposes.
Ability to delete open expense reports	This feature enables a user to delete an expense report from their "My Expense Reports" list that is still in the open state without the need to resort to an administrator.
Enforcing a time period Limit on the creation of past expense entries	This option will limit how far back a user can create an expense entry. This is a global option and is defined in units of days, weeks or months.
Allow overriding the User's Site Currency exchange rate	This feature allows users to override their Site currency exchange rate to calculate the reimbursable amount on this rate.
Addition of Mask Code for the credit card import	For security purposes, the User is able to define a credit card number mask code which will be used during the AMEX import.
Project Server Integration	
Project Server 2007 support	Integration with Microsoft Project Server 2007.
Bi-directional ETC Integration	This enhancement enables MSP remaining work to map to Tenrox ETC upon each publish of the project.

Organizational Breakdown Structure (OBS) and Work Breakdown Structure (WBS) Setup	
Make filters user specific	This enhancement saves filters and associates them to the users that performed them rather than the overall role.
Add Resource Type to user setup filters	This feature extends the user setup search capabilities to include: Resource Type.
Add option to search for inactive Users in User List	This feature searches for inactive Users on the User List browse pages.
Import of Microsoft Project XML file to Tenrox	Imports the work breakdown structure and resources from a Microsoft Project plan (in XML format) to Tenrox (no setup required).
Dashboards and Web Parts	
User Task List	This new web part gives Users visibility on all their assignments' status.
Project Manager Task List	This new web part gives Project Managers visibility on all their projects' status.
Tenrox Project Plan (TPP)	
Addition of Cost and Billing Forecast Rates	Tenrox User Forecasting rates are imported into TPP along with the resources.
Forecasted and Actual Cost and Billing Rollup	Forecasted and Actual Cost and Billing amounts are calculated and rolled up to the Task.
ETC Synchronization	ETC is updated in Tenrox based on the Tenrox Project Plan.
Date-based User Assignment	This feature specifies assignment start and end dates.
Assign Resources to multiple tasks at once	This feature assigns resources to multiple tasks simultaneously.
Line numbering	The rows will now be numbered on all applicable views.
Tenrox Planned Project flag at Task level	A flag will be added to the Task screen in Tenrox to indicate that it originates from TPP.
Publish milestones to Tenrox	TPP milestones are now created as milestones in Tenrox.
Task attributes	Addition of Task attributes (billable, capitalized, funded, R&D, payable) to TPP.
User Configured Views	User configured views (addition/removal of columns) are saved.
Currency in TPP	The Tenrox base currency is imported to TPP.

Addition of Language preference	User can select the TPP language (English or French).
Mapping of plan to an existing Tenrox portal project	With this option, the TPP project plan can be published into an existing Tenrox portal project which is managed by the logged User.
Mapping of Tasks to an existing Tenrox portal work type	With this option, the TPP Task can be created in Tenrox portal using a specific Work Type.
System Changes	
Set Initial page to last visited page (by default, the timesheet)	The User's initial page is set to the Last visited page and this page defaults to the Timesheet.
Configurable menu	With this feature, users can now customize the application menu globally or based on security profiles.
The Processes menu is now displayed in a panel on the left	The processes menu look is now a left panel menu as opposed to the default Tenrox menu style.
Microsoft CRM Enhancements	
Addition of Project Entity to CRM	The Opportunity mapping to Tenrox is replaced with the new Project entity mapping.
Milestone Changes	
Addition of Work Type Browse	Users can select the Work Type with which to create the Milestone Task.
Addition of Charge Browse	Users can select the Charge with which to create the Milestone Charge entry.
Addition of Percent Complete	Users can specify the percentage of completion for a milestone.
Reports	
Addition of Client Invoice History MSRS report	This report displays a history of invoices for selected Clients.
Addition of Aged Receivable MSRS report	This report displays a list of all invoices with outstanding balances.
Invoice Changes	
Addition of Document Date	With this option, Users are able to define a Document Date for the Invoices to be recognized as A/R and aging.
Ability to select Expense Reports/Entries to invoice	With this feature, Users are able to define which Expense Report or Expense Entries to invoice.

ETC and Budget	
ETC will be determined by the assignment budget	The ETC is set to the Current Time budget.
Option to allow modifying ETC	This option allows making the ETC read-only or editable.
Collaborative Workforce Planning (CWP)	
Project field added to Resource Request list pages	A Project field is added to the Resource Request list pages.
Addition of Requested Resources recipient	Option to send notifications to requested, proposed or committed resources.
Work Plan link now available for CWP notifications	A live link parameter is added to the CWP notifications, which takes the user to the Work Plan page.