

Release Notes

What's New in Tenrox?

Release Tenrox 2013 R1

May 2013

Tenrox

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Tenrox 2013 R1: May 2013

Tenrox 2013 R1 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.

This document contains the following:

- Features available as of Tenrox 2013 R1
- Features deprecated as of Tenrox 2013 R1



FEATURES AVAILABLE AS OF TENROX 2013 R1

The following are the features included in this Tenrox 2013 R1 Release.

TENROX 2013 R1 FEATURE SET	
Feature	Description
CERTIFIED INTEGRATIONS	
Microsoft Project (MSP)	Improves the Update capability from the Tenrox menu in MSP.
Paychex	<p>Implements the Paychex Integration with the following Export capabilities to Paychex:</p> <ul style="list-style-type: none"> ▪ On Payroll Batch Export - Hours are passed ▪ On Payable Batch Export to - Expense Amount is passed ▪ On Payable Batch or Payroll Batch Export to Paychex - Money Charges are passed <p><i>New Guide:</i> Paychex Integration Guide</p>
QuickBooks Online	<p>Tenrox supports the following versions:</p> <ul style="list-style-type: none"> ▪ QuickBooks Online Essentials ▪ QuickBooks Online Plus <p><i>Updated Guide:</i> QuickBooks Integration Guide</p>
QuickBooks Desktop	<p>Tenrox adds QuickBooks 2012 to the QuickBooks Desktop versions it supports.</p> <p><i>Updated Guide:</i> QuickBooks Integration Guide</p>
COLLABORATIVE WORKFORCE PLANNING (CWP)	
Hiding Projects on a Work Plan	<p>Provides ability to toggle between hiding and showing Projects on a Work Plan.</p> <p><i>Updated Topics:</i> CWP Workflows Setup: User Work Plans CWP Workflows Setup: Group Work Plans CWP Workflows Setup: My Work Plan</p>
Leave Request Notification to Project Manager	<p>Automatically sends a notification to the Project Manager upon the Approval of a Leave Request for a resource who has Committed hours for a Project within the Leave Request dates.</p> <p><i>Updated Topics:</i> CWP Workflows Setup: Project Work Plans CWP Workflows Setup: User Work Plans User Setup: Leave Request Enhancements Workflow Setup: Creating the States and Transitions for the Workflows Workflow Setup: Defining the Workflow Transitions</p>
EXPENSE	
Preview Attachments	<p>Allows the viewing and printing of selected Expense Reports with any attached receipts.</p> <p><i>Updated Topics:</i> Manager: Expense Management Links and Fields Standard User: Displaying the Components of the Expense Report List</p>
FINANCIAL MODULE	



Updated Out-of-Box Currencies	<p>Update of out Of Box Currencies Removal of <i>Belgium Franc, Italian Lira, Austrian Schilling, French Franc, Irish Pound</i>. Addition of <i>Chinese Yuan, South Korean Won, United Arab Emirates Dirham, New Taiwan Dollar, New Zealand Dollar</i>.</p> <p><i>Updated Topic:</i> Financials Setup: Setting Up Currency</p>
WIP Accrual Batch Changes	<p>Excludes entries having an associated Revenue Recognition Schedule in the WIP Accrual Batch when a policy of type <i>Time and Materials</i> exists on the Project.</p> <p><i>Updated Topics:</i> Financials Setup: Setting Up and Viewing WIP Accrual Batches Financials Setup: Setting Up WIP Policies Financials Setup: Time and Materials Rule Financials Setup: WIP Policy Defaults Financials Setup: WIP Policy Rule Types</p>
WIP Policy Change	<p>Prevents the definition of a WIP Policy on a Project when a Revenue Recognition Policy with <i>Fixed Amount</i> exists on the Project.</p> <p><i>Updated Topics:</i> Financials Setup: Setting Up WIP Policies Financials Setup: WIP Policy Defaults Financials Setup: WIP Policy Rule Types Project Setup: Setting Up WIP Policy, Project Expenses, Business Units and Pay Codes</p>
Project Recognition Schedule Setup	<p>Allows the defining/overriding, as well as the auditing of changes made to, the Recognition Schedule at the Project level.</p> <p><i>New & Updated Topics:</i> Project Recognition Schedule Automation and Upgrades Project Setup: Setting Up Project Options, Attributes and Tasks Saving and Distribution of Revenue Recognition Schedules for Projects Security Settings to Access and Audit Trail for Project Level Revenue Recognition Schedules Setting Up Revenue Recognition Rules at the Project Level Setting Up Revenue Recognition Schedules for Projects</p>
Invoice Payment Improvements	<p>Allows ability to quickly access the Invoice Payment page; to define the date the payment was received; to make payment adjustments and corrections; to enter a payment that exceeds the invoiced amount.</p> <p><i>Updated Topics:</i> Invoice Setup: Posting Invoices Invoice Setup: Using the Invoice Manager Page</p>
Monitoring Currency Exchange Service	<p>Improves the web service to better monitor the Currency Exchange service, ensuring all is running and functioning correctly.</p>
GENERAL	
Grid conversion to .Net	<p>Improves some existing grids/tables by converting them to .Net (from .asp grids), while maintaining existing functionality.</p>
Object Browser pages in .NET	<p>Improves existing object browser pages by converting them to .NET, while maintaining existing functionality.</p>
Browser Compatibility	<p>Support for Win8/IE10 32 bit.</p> <p><i>Updated Guides:</i></p>



	<p>Server Installation Guide Web Browser Configuration Guide</p>
Report Security Changes (DB User access)	<p>Adds a new Database User setup, through which the User creates a login allowing them read-only access to the database with the ability to also execute stored procedures; mainly for the purpose of running Reports.</p> <p><i>Updated Guide:</i> Server Installation Guide</p>
Integration WebService	<p>This feature further improves the WebService connection.</p>
Attach File	<p>Allows the selection and attachment of document files through the Documents page's browse window, and listing the newly selected file in the Documents table.</p> <p><i>Updated Topics:</i> Attaching Documents to Portfolios Attaching Notes and Documents</p>
Remember Top Menu Collapse or Expand	<p>Enables the ability for the selection of either the <i>Collapsed</i> or <i>Expanded</i> view of the top menu to be recalled upon logging on to the application from the same computer.</p> <p><i>Updated Topic:</i> Accessing the Menu Bar in the Tenrox Application</p>
Tab Scrolling	<p>Implements a Tab scrolling system, as well as limit the amount of displayed characters, which allow for multiple Tabs to display for Project Central, Timesheet Manager, Expense Report and Report Central.</p> <p><i>Updated Topics:</i> Creating Project Central Custom Tabs Editing the Project Central Tabs Expense Report Management Manager: Expense Management Lists Reports Tab Standard User: Displaying the Components of the Expense Report List Timesheet Manager: Navigating to the Timesheet Lists</p>
LEAVE TIME	
Hiding Inactive Users in the Leave Time Calendar	<p>De-clutters the Leave Time Calendar views to exclude Leave Request entries originated by Users currently inactive, specifically those flagged as suspended and decommissioned.</p> <p><i>Updated Topic:</i> Timesheet Setup: Viewing the Group Leave Time</p>
ORGANIZATIONAL BREAKDOWN STRUCTURE (OBS) AND WORK BREAKDOWN STRUCTURE (WBS) SETUP	
Timesheet Approvers at Group Level	<p>Allows the assigning of multiple Timesheet Approvers through the Group component, enabling sharing the task of approving Timesheets.</p> <p><i>Updated Topics:</i> Group Setup: Creating a New Group Timesheet Setup: Setting Up Timesheet Manager Workflow Setup: Creating the States and Transitions for the Workflows</p>
All Tasks Under One Project Notification	<p>Provides the option to have a specific Project Budget Notification also created for <i>all</i> of the Tasks on the Project, avoiding having to set it up for each Task.</p> <p><i>Updated Topic:</i></p>



	Project Setup: Setting Up Project Budgets and Cost and Billing Rules for Projects
Inclusion of UDF Values on Project Copy	Provides the added option of copying User Defined Field values of a Project and its Tasks upon using the Project Copy function. <i>Updated Topic:</i> Copying a Project
Inclusion of Budget Notifications on Project Copy	Provides the added option of copying the Budget Notifications to a new Project and its associated Tasks upon using the Project Copy function. <i>Updated Topic:</i> Copying a Project
Definition of Project Id on Project Copy	Allows the User to define the new Project Id during the Copy process by entering it directly on the Project Copy window. <i>Updated Topic:</i> Copying a Project
Work Type Search	Provides the option to search for a specific Work Type through the Project's Task tab, no longer having to attempt locating it directly in the hierarchy. <i>Updated Topic:</i> Project Setup: Setting Up Project Options, Attributes and Tasks
Show Active Rate Rule in Project Team	Enables the display of the current rule to be used for rating entries in the Actual Cost Rate and Actual Billing Rate fields within the Project Team tab of Project Edit page. <i>Updated Topic:</i> Project Setup: Defining the Project Team
Project PO UDFs	Allows the addition of User Defined Fields for the Project PO tab of the Project Edit page. <i>New Topic:</i> Project Setup: Project PO User Defined Fields
Project Status Report Values	Ensures values in the Project Status Report properly correspond with the same values retrieved from other areas of the application, such as the OLAP Reports . <i>Updated Topic:</i> Project Setup: Viewing a Project Status Report
Suspension of Projects, Tasks on Suspending a Portfolio	Allows the option to suspend or un-suspend associated Projects and Tasks upon suspending or un-suspending a Portfolio . In turn, upon un-suspending a Project or Task , the associated Portfolio is automatically un-suspended. <i>Updated Topics:</i> Portfolio Setup: Creating Portfolios for Projects Project Setup: Creating Projects Task Setup: Creating a Task
REPORTS	
AdHoc UDF Reporting	Allows the addition of User Defined Fields to the Ad Hoc Reporting views. <i>Updated Guide & Topic:</i> Reports Guide Report Setup: Setting Up the Ad Hoc Reports
Exclusion of Suspended Projects	Addition of an option, Include suspended Projects , allows users to filter out, or not, suspended Projects when running the Project Revenue Summary report. <i>Updated Guide:</i>



	Reports Guide
Blank Date Parameter	Allows the date parameter/filter to be left blank on designing an Ad Hoc report, thereby forcing the selection of a date parameter as no pre-set will be provided. <i>Updated Topic:</i> Report Setup: Designing Ad Hoc Reports
Download Report File	Allows the ability to download the RDLC from the Design page through the Download Report File link. <i>Updated Topics:</i> Report Setup: Designing Ad Hoc Reports Report Setup: Previewing Reports
Weeks Start Date	Addition of Weeks Start Date to the Milestone Target Billing Date dimension for an OLAP Report with the Cube set as Projects . This allows for more accurate reporting on revenue forecasting when amounts are based on Milestones .
Filtering with IN and Special Characters	Facilitates the use of the IN operator when any of the multiple Filter Parameters contain either single or double quotes, thereby allowing the filtering of AdHoc Reports with such special characters. <i>Updated Topic:</i> Report Setup: Designing Ad Hoc Reports
SETTINGS	
Logon Name Inaccessible	Prevents the User from accessing the Logon name from the Settings window available through the Settings link found at the top-right corner of the application. <i>Updated Topic:</i> Setting Up the Application Preferences and Quick Links in Tenrox
TENROX PROJECT PLAN (TPP)	
Multiple Baseline Display	Allows displaying of multiple Baselines in the Tracking Gantt view. <i>Updated Topics:</i> Baselines: Creating and Saving Baseline Data Baselines: Tracking with the Gantt Chart
TPP Publish Security	Allows the overriding of the verification of the User's rights to create Projects in Tenrox when they publish project plans into existing Tenrox Projects . <i>Updated Topic:</i> Project Planning Tool: Mapping Tenrox Projects with the Project Planning
CWP Work Plan Options in TPP	Addition of a drop-down field allows the User to select whether or not, and how, to update the Work Plan in Tenrox when publishing the Project from TPP. <i>Updated Topic:</i> Project Planning Tool: Mapping Tenrox Projects with the Project Planning
Automatically Update Resource Calendars	Addition of an option to automatically update the Resource calendars in TPP before publishing the Project Plan in order to avoid allocation issues. <i>Updated Topic:</i> Project Planning Tool: Integrating the Project Planning Tool with Tenrox
TIMESHEET	
Indication Period Closed	Provides a text indication, " Period Closed ", on the Timesheet Manager page, when a Timesheet is within a closed period and consequently cannot be "actioned". <i>Updated Topic:</i>



	Manager: Updating Timesheets from Timesheet Manager
Overriding Minimum Hours Restriction	Allows the overriding of the minimum time entry rule to permit Timesheet submission by a user hired after the rule date or terminated before the rule date. <i>Updated Topic:</i> Manager: Updating Timesheets from Timesheet Manager
Timesheet Object Auto-Selection	Allows the selection of a lower level Timesheet object (e.g. Task) before the selection of a higher level Timesheet object (e.g. Project). Therefore, upon selecting an item from a lower level dropdown field, the higher level dropdown(s) field(s) is/are auto-selected and the next lower level dropdown field is filtered accordingly. <i>Updated Topic:</i> Timesheet Object Selection
Portfolio and Project Dependency	Established a dependency between the Portfolio and Project Timesheet objects, therefore allowing the filtering of the Project dropdown field based on the Portfolio selection. <i>Updated Topic:</i> Timesheet Object Selection
'12' and '24 for In/Out Time Entry	Allows accurate time representation of these cell entries in an In/Out Timesheet : <ul style="list-style-type: none"> ▪ '12' results in a value of 12:00 PM ▪ '24' results in a value of 12:00 AM <i>Updated Topic:</i> Standard User: Entering Time in In/Out Timesheet View
Cancel Manual Overtime	Provides an option to Cancel out of the manual Overtime screen and is returned back to the Timesheet . <i>Updated Topic:</i> Overtime Processing: Banking Overtime Hours
TIMESHEET SETUP	
Display Assignments with Time Entries in Previous Period	Addition of a Timesheet Template rule, Display only Assignments with Time Entries in the previous period . Selecting this option from the Timesheet Template Edit page allows displaying on the Timesheet, by default, those Assignments with time entries in the previous period. <i>Updated Topic:</i> Timesheet Setup: Options Tab
Apply Minimum Hours for Selected Days.	Provides an option to enforce daily minimum hours for specifically chosen days of the week through the Selected Day(s) bubble on the Timesheet Template Edit page. <i>Topic:</i> Timesheet Setup: Rules Tab
Colors for Days of the Week	Provides the option, from the Timesheet Template Edit page, to designate a color for each day of the week, resulting in the selection set as the background color for the day column on the Timesheet . <i>Updated Topic:</i> Timesheet Setup: Setup Tab
Colors for Holidays	Provides the option, from the Timesheet Template Edit page, to designate a color for the Holidays , resulting in the selection set as the background color for the Holidays day(s) column(s).



	<p><i>Updated Topic:</i> Timesheet Setup: Options Tab</p>
Colors for Non-Working Time	<p>Provides the option, from the Timesheet Template Edit page, to designate a color for Non-Working days, resulting in the selection set as the background color for the Non-Working day(s) column(s).</p> <p><i>Updated Topic:</i> Timesheet Setup: Options Tab</p>
Prevent Submission of Empty Timesheets	<p>Addition of a Timesheet Template rule, Enforce minimum rules only when Time Entries exist. Selecting this option applies all the chosen minimum rules when there <i>are</i> time entries, while not selecting it enforces them even with <i>no</i> time entries, therefore barring any submission of an empty Timesheet.</p> <p><i>Updated Topic:</i> Timesheet Setup: Rules Tab</p>
Min/Max Error Messages for Percentage Time Entry Unit	<p>Allows displaying minimum/maximum error messages appropriate for when Time Entry Units are in Percentage, as opposed to messages more suited for when Time Entry Units in Hours with the hours indicated.</p> <p><i>Updated Topics:</i> Timesheet Setup: Options Tab Timesheet Setup: Rules Tab</p>
USER SCOPE	
Scoping	<p>Facilitates the use of the Scoping functionality by NOT automatically:</p> <ul style="list-style-type: none"> ▪ Adding a newly created Site to the Site Administrator's Scope; ▪ Applying it to newly created Users, thus they are not associated to any Site, resulting in their ability to view all Users and objects. <p><i>New Topic & Guide:</i> Scoping Scoping User Guide</p>
USER SETUP	
Progress of Manually Processed Leave Time	<p>Informs the User, when the Leave Time is manually processed, that the processing has started and is in progress, and once it is completed the User is notified and is provided with a status of the process.</p> <p><i>Updated Topic:</i> User Setup: Defining Leave Time Tasks</p>
WORKFLOWS	
Security Profiles from a Workflow	<p>Provides access to the Security Profiles directly from the Workflow, facilitating the assignment of a Workflow to a Security Role.</p> <p><i>Updated Topic:</i> Workflow Setup: Creating New Workflows</p>
WORK PROCESS	
Work Process Entry Navigation	<p>Allows the User to navigate through the list of Work Process entries using a Next and Previous functionality without having to open each entry individually.</p> <p><i>Updated Topics:</i> Standard User: Creating and Editing Work Process Entries Work Process Setup: Accessing Work Processes</p>



FEATURES DEPRECATED AS OF TENROX 2013 R1

The following are the features deprecated as of this Tenrox 2013 R1 Release.

TENROX 2013 R1 DEPRECATED SET	
Feature	Description
CERTIFIED INTEGRATIONS	
Great Plains	Support of Great Plains 9.
COLLABORATIVE WORKFORCE PLANNING (CWP)	
Task-Based	Support of entire Task-Based CWP Component.

