



UPLAND PROJECT PLANNER

An integrated solution

Tenrox Product Management

March 2016

TODAY'S SPEAKERS



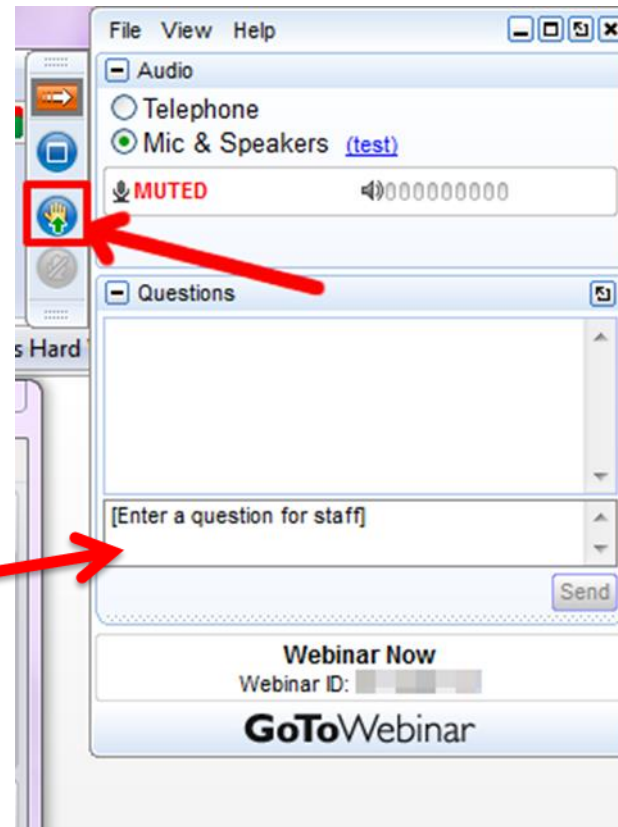
Kevin Sequeira
General Manager & Director of Product, Tenrox



Stefan Kresse
Product Manager – Upland Project Planner



HOUSEKEEPING



Type in your
question here

Click Send

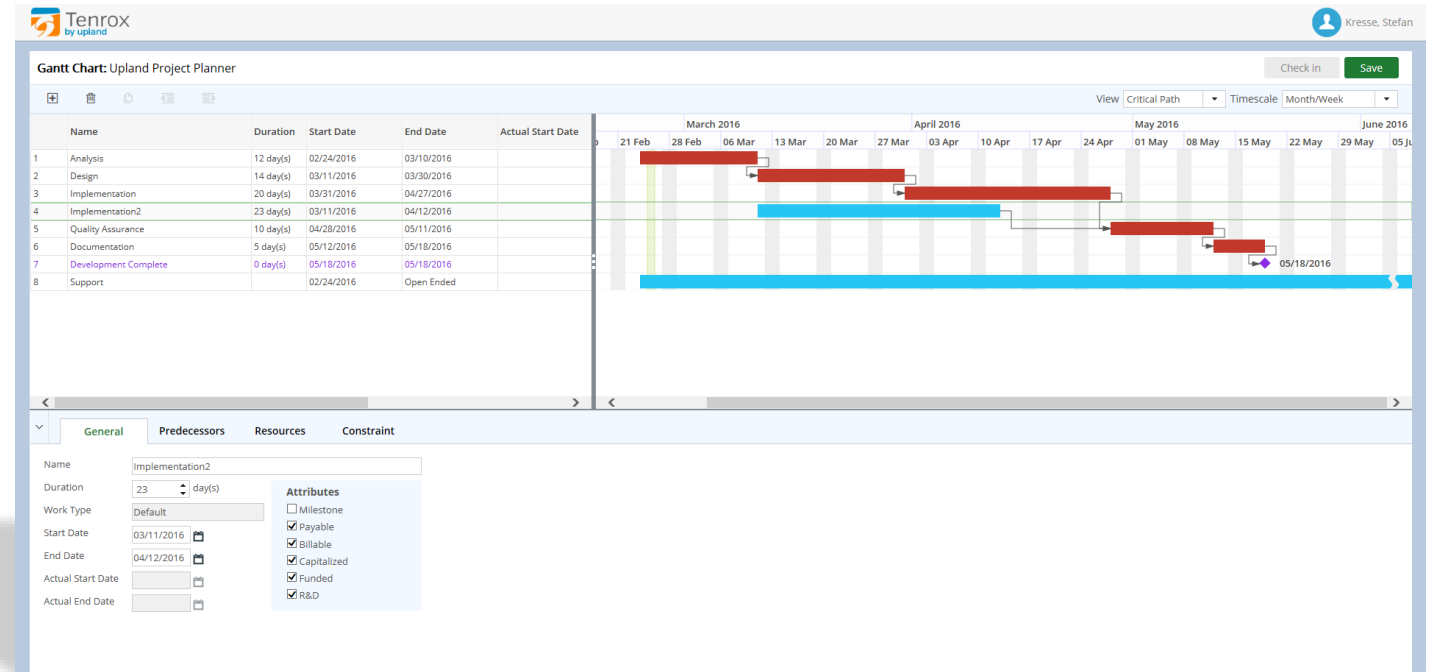


AGENDA

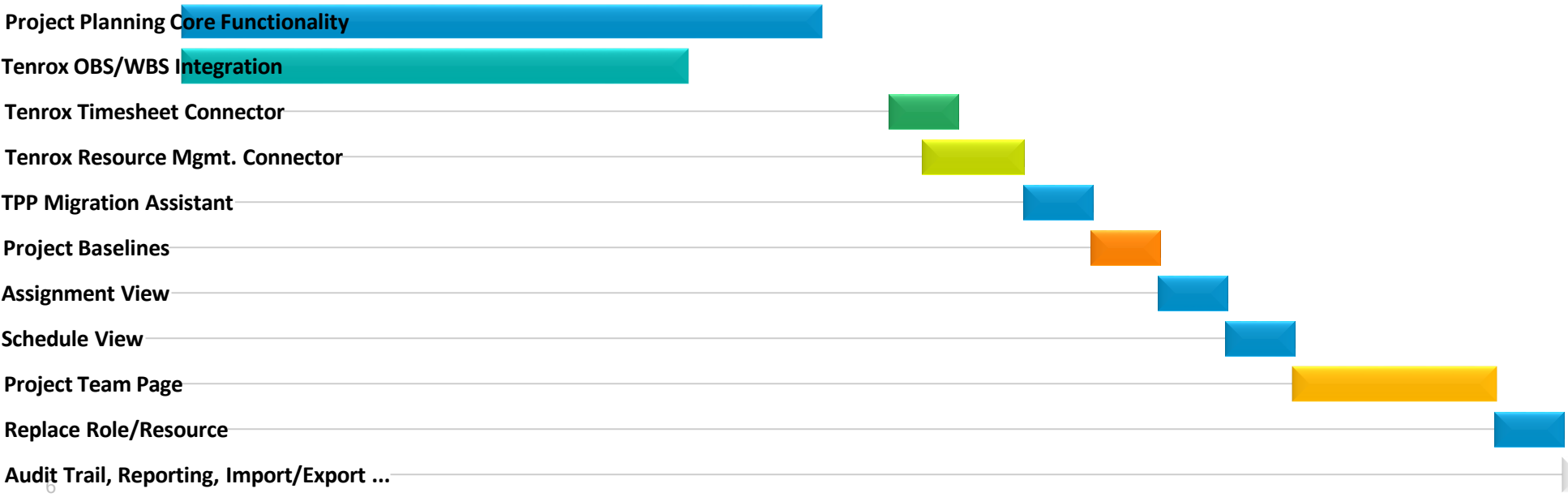
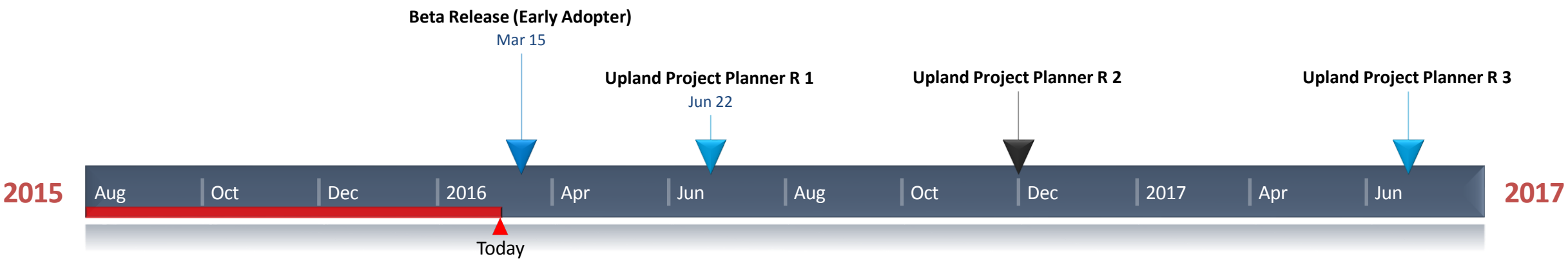
- + Vision
- + Roadmap
- + Architecture
- + Tenrox Integration
- + Demo
- + Questions

VISION

- + Cloud-Based
- + Captivating User Experience
- + Seamless Integration
- + High Performance
- + Quality & Maintainability



ROADMAP



ARCHITECTURE

Presentation

HTML, JavaScript, JQuery,
Scalable Vector Graphics (SVG) for Gantt

Business

Business logic command handler,
Business logic,
Scheduling Engine

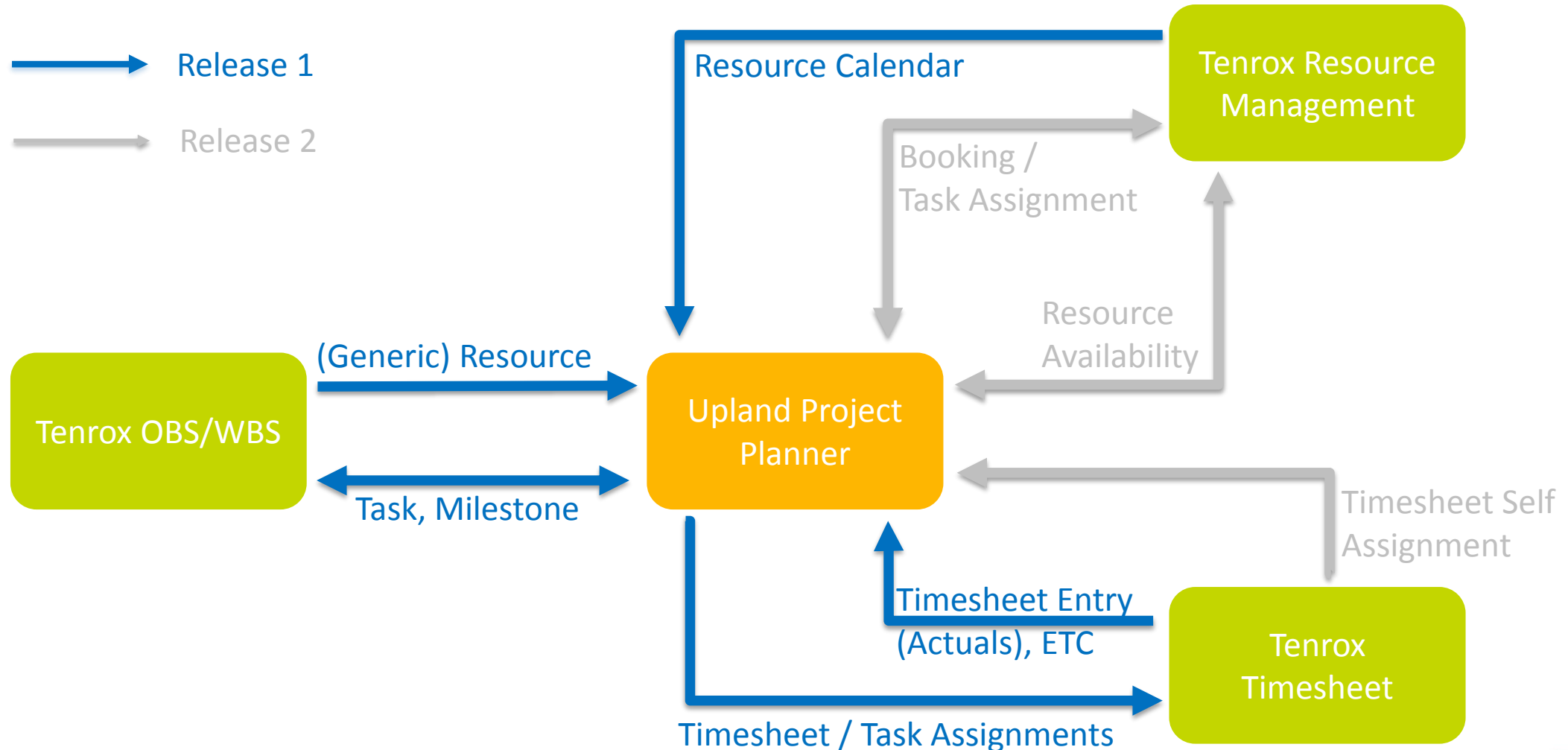
Data

Data Access Layer,
Web API,
Tenrox SQL Database (MS Entity Framework)

Testing Frameworks

FitNesse.org,
Webperformance.com,
Telerik.com

TENROX INTEGRATION



DEMO



- | | | |
|----------------------------------|--------------------------------|---------------------------|
| + Work Breakdown Schedule | + Develop project team | + Track timesheet actuals |
| + Milestones | + Assign resources | + Track ETC |
| + Gantt Chart | + Book resources | + Track % Complete |
| | + Update timesheet assignments | + Baselines |

LAUNCH UPLAND PROJECT PLANNER

The image displays two screenshots of the Tenrox by upland software interface, illustrating the steps to launch the Upland Project Planner.

Top Screenshot: Upland Project Planner Form

The interface shows the 'Upland Project Planner' form. The 'Project Planner' tab is highlighted in the top navigation bar. The form includes fields for:

- Name: Upland Project Planner
- Id: [Empty]
- Client: Internal
- Manager: [Empty]
- Parent: Projects
- Start date: 03/01/2016
- End date: Open ended
- Project Code: UPP1234
- Portfolio: Internal
- Alternate manager: [Empty]
- Workflow: Immediate Execution
- Priority: 1 Low
- Health: [Green checkmark]

Bottom Screenshot: Project List

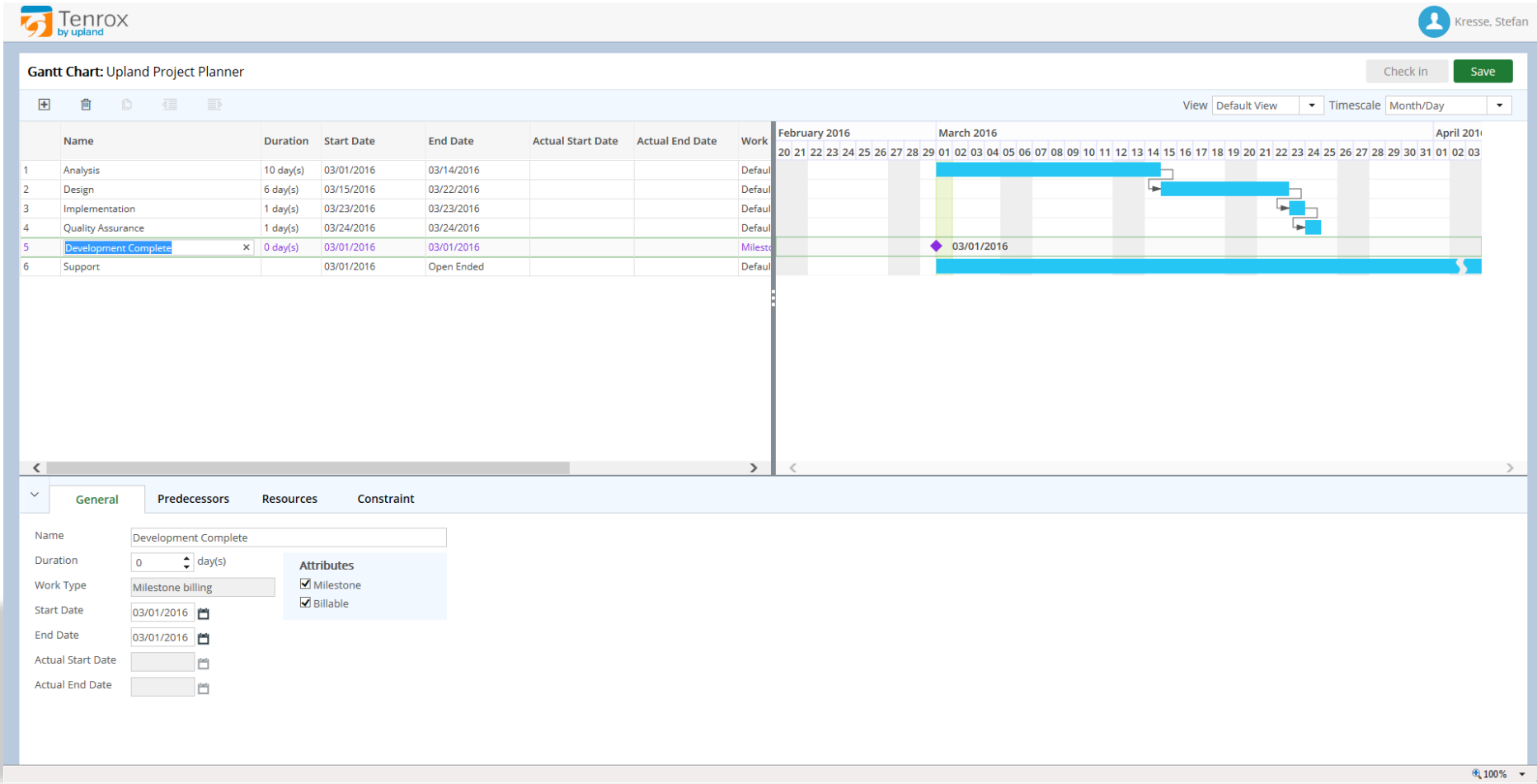
The interface shows the 'Project' list. The 'Project Planner' option is highlighted in the context menu.

Project	Client	State	Action
cc01	Internal	Active	--- Please select ---
General	Internal	Active	--- Please select ---
Internal	Internal	Active	--- Please select ---
Upland Project Planner	Internal	Active	--- Please select ---

The context menu for 'Upland Project Planner' includes the following options:

- Work Plan...
- Project Status Report...
- Calendar...
- Workspace...
- Project Planner**
- Copy...
- Import...
- Delete
- Refresh
- Column Selection...

EDIT WORK BREAKDOWN SCHEDULE



EDIT TASK PREDECESSORS

Tenrox
by upland

Administrator, Master

Gantt Chart: Upland Project Planner

Check in Save

View Default View Timescale Month/Day

	Name	Duration	Start Date	End Date	Actual Start Date	Actual End Date	Work
1	Analysis	5 day(s)	03/02/2016	03/08/2016			Default
2	Design	10 day(s)	03/09/2016	03/22/2016			Default
3	Implementation	15 day(s)	03/25/2016	04/14/2016			Default
4	Quality Assurance	10 day(s)	04/15/2016	04/28/2016			Default
5	Development Complete	0 day(s)	04/28/2016	04/28/2016			Milestone
6	Support		03/02/2016	Open Ended			Default

GeneralPredecessorsResourcesConstraint

NameImplementation

Task List

☐ NameTypeLag

☐ DesignEnd To Start2 day(s)

☐

AnalysisQuality AssuranceDevelopment Complete

100%

EDIT TASK RESOURCES

Tenrox
by upland

Organization

Work

Clients

Portfolios

Projects

Phases

Work Types

Tasks

Products

Components

Workforce Planning

Timesheet

Expense

Financial

Purchase

Work Processes

Setup > Work > Projects > Project Edit: Upland Project Planner

General Options Tasks Milestone Work Plan Project Team Budget Cost Billing Financial Planner

Back | Refresh | New | Delete | Assign | Project Leave Time

Resource	Hard Booked Hours	Forecasted Cost Rate	Forecasted Billing Rate	Actual Cost Rate	Actual Billing Rate
☐ Doe, John	0.00	No current rule	No current rule	No current rule	No current rule
☐ Smith, Joe	0.00	No current rule	No current rule	No current rule	No current rule
☐ Team Member	0.00	No current rule	No current rule	No current rule	No current rule

Team Member

Tenrox
by upland

Administrator, Master - Administrator

Gantt Chart: Upland Project Planner

Check in Save

View Default View Timescale Month/Day

Name	Duration	Start Date	End Date	Actual Start Date	Actual End Date	Work
1 Analysis	5 day(s)	03/02/2016	03/08/2016			Default
2 Design	10 day(s)	03/09/2016	03/22/2016			Default
3 Implementation	15 day(s)	03/25/2016	04/14/2016			Default
4 Quality Assurance	10 day(s)	04/15/2016	04/28/2016			Default
5 Development Complete	0 day(s)	04/28/2016	04/28/2016			Milestone
6 Support		03/02/2016	Open Ended			Default

< >

General Predecessors Resources Constraint

Name Implementation

Planned Work 120.00 hr(s) ☒ Use Default

Allocated Work 120.00 hr(s)

Variance 0.00 hr(s)

Resources

Role	User	Booking Type	Units	Allocated
☐ Team Member	Doe, John	Hard Booking	100.00	120.00 hr(s)
☐ Team Member	Smith, Joe	Hard Booking	0.00	0.00 hr(s)
☐ Business Analyst		Hard Booking	0.00	0.00 hr(s)
☐ Select...	Select...			

EDIT TASK CONSTRAINT

Tenrox
by upland

Administrator, Master

Gantt Chart: Upland Project Planner

Check in Save

View Default View Timescale Month/Day

	Name	Duration	Start Date	End Date	Actual Start Date	Actual End Date	Work
1	Analysis	5 day(s)	03/02/2016	03/08/2016			Default
2	Design	10 day(s)	03/09/2016	03/22/2016			Default
3	Implementation	15 day(s)	03/28/2016	04/15/2016			Default
4	Quality Assurance	10 day(s)	04/18/2016	04/29/2016			Default
5	Development Complete	0 day(s)	04/29/2016	04/29/2016			Milestone
6	Support		03/02/2016	Open Ended			Default

General Predecessors Resources Constraint

NameImplementation

Constraint

Type

Start On

As Soon As Possible

Start On

Finish On

Date

03/28/2016

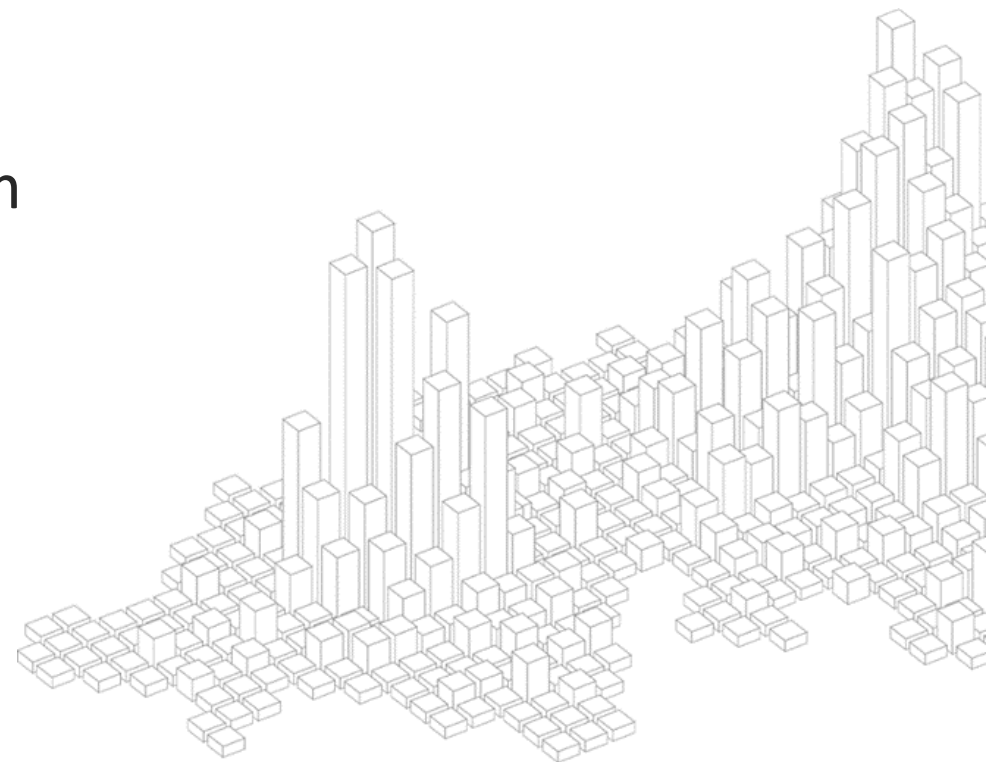
100%



FEEDBACK

+ Upland Community

+ TenroxProductManagement@uplandsoftware.com



CONTACT US



Phone

- + Direct: 450-688-3444
- + Toll free (US and Canada): 855-944-PLAN

Email

- + info@uplandsoftware.com

Website

- + www.tenrox.com

CONNECT WITH US



@tenrox



Tenrox



Company: Tenrox

