

Tenrox 2015 R1 Customer Webinar



Tenrox Product Management

20th July, 2015

Tenrox 2015 R1 – What's New



Today's Speakers



Kevin Sequeira

General Manager & Director of Product Management



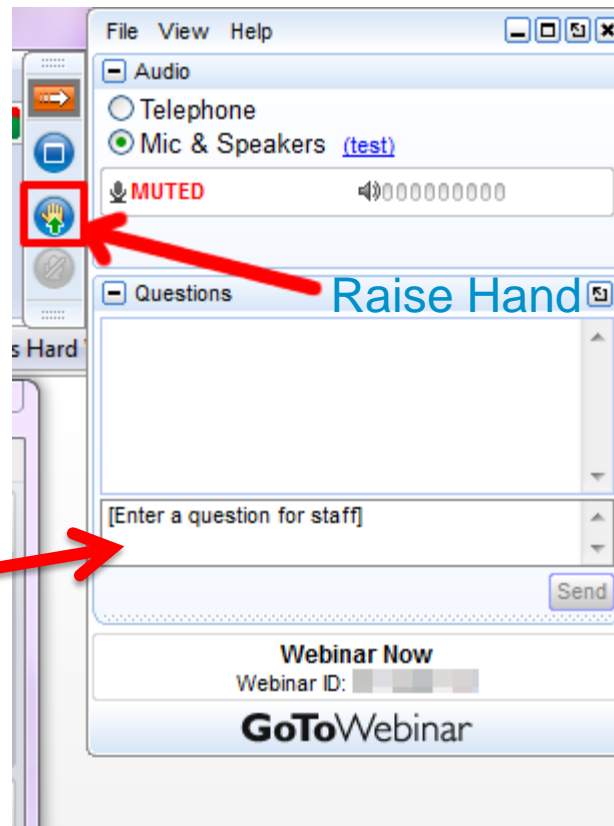
Eric Demers

Senior Solution Consultant



Housekeeping

To submit a question:



Type in your
question here

Click Send

TENROX 2015 R1



Guiding Principles



**CUSTOMER DRIVEN
INNOVATION**



STABILITY



SCALABILITY



**QUALITY
INITIATIVES**

Highlights of the Release

- GA Release : July 15th 2015
- New Modules
 - Project Status Reporting (PSR)
 - Product Central
- Enhancements
 - Upland Analytics
 - Financial Planner
 - Project Team Enhancements
 - Auto Save Timesheet Notes
 - New Grid Control
 - Infrastructure and Architecture
- Updated Integrations



Quick Links

- **Press Release**

- <http://www.tenrox.com/press-release/2015-07-15-customer-driven-innovation-highlighted-in-latest-version-of-uplands-professional-services-automation-application>

- **Release Webpage**

- <http://www.tenrox.com/en/solutions/Tenrox2015-R1.htm>

- **Release Notes**

- <http://upland.screenstepslive.com/s/TenroxEducation/m/40422/I/385371-what-s-new-in-this-tenrox-2015-r1-version>



FEATURE OVERVIEW



Project Status Reporting (PSR) Module

- **Highlights**

- Allows Project & Portfolio managers to easily track time-phased status' of their projects.
- Ability to Configure Key Performance Indicators (KPIs).
- Period Locking & Archiving Capabilities
- Track late updates of those who report to you (Group / Portfolio)
- Trending Reports on the Project Status

- **Availability**

- Project Collaboration License - PSR, TPP & *Online Planner* *.
- Customers that have TPP will get this for free.
- If you do not have TPP please contact your CSM.



Project Status Reporting (PSR) Module

- My Timesheet
- Timesheet Manager
- Leave Request
- My Schedule
- Expense Report
- My Work Plan
- Charges
- Products
- Purchase
- Requisition
- Resource Scheduling
- Project Scheduling
- Collaboration
- Project Status

Entries > Project Status

Projects

Archive Export

My Projects

Project Name	State	Health	Last Update	Last Modified
ACME Plumbing	In Progress	✓	01/26/2015	01/26/2015 9:32:05 AM
✓ County Advising	In Progress	✓	01/19/2015	01/19/2015 11:04:32 AM
Test Suite	On Hold	⚠	01/26/2015	01/23/2015 4:53:43 PM
Website Reskin	Approved	✓	01/26/2015	01/26/2015 8:21:33 AM

« First 1 2 3 4 5 ^ Last »

Update History

+ New Delete Copy Archive Export

Week of	Health	Health Reason	Consumed Budget
✓ 01/19/2015	✓	Project under control	\$22,000.00
01/12/2015	✓	Project under control	\$21,000.00
01/05/2015	⚠	Sponsor unresponsive	\$18,000.00

Quick Links

Status Update

Project Manager E-mail Hughes, Sally

Team Members E-mail Anderson, Jenny Edwards, Mark O'Donnell, Stephan

Project Name: County Advising

Client Name: Georgetown County

Portfolio: Consulting

Start Date: 01/01/2015

End Date: 02/28/2015

Total Budget \$46,000.00

Consumed Budget \$22,000.00

Remaining Budget \$24,000.00

Milestones 3

Issues 12

Update Period: 01/19/2015

Health: ✓

Health Reason: Project under control

Comments: Project is advancing. Need to speak to Caroline to let her know of progress.

Mitigation Plan: No risks to mitigate at this time.

Completed Activities: Analysis of current process, proposed new process, approval from sponsor

Planned Activities: Plan for pilot project using new process, execution of pilot project, analysis of results, documentation.

Cancel Save Submit

Last modified 01/19/2015 11:04:32 AM by Hughes, Sally

Product Central Module

• Highlights


- Define Time Phased Product billing rules.
- Facilitates Quick Invoice and Rev Rec and reduces Revenue Leakage.
- If Enabled, Product Billing Feature becomes Read-Only.
- Reporting on consumed & remaining quantity and amount for each rule.

• Availability

- Customers that have Billing Module will get this for free.
- If you do not have the Billing Module, please contact your CSM.



Product Central Page


Ashton, Mark - Administrator

Entries > Products > Product Central

[+ New](#)
[Delete](#)
[Refresh](#)
[✓ Approve Entries](#)
[✕ Export to Excel](#)

View: All Projects
Project: Campus Project

	Task	Product	# Units	Unit Price	Total Amount	Billable	April 2015		May 2015		June 2015		Total Completed		
							# Units	Amount	# Units	Amount	# Units	Amount	# Units	Amount	# Units
<input type="checkbox"/>	CWP-Client Meeting	Day	5.00	1,500.00	7,500.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	2.00	3,000.00	
<input type="checkbox"/>	CWP-Documentation	Document	12.00	1,200.00	14,400.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	1.00	1,200.00	
<input type="checkbox"/>	CWP-Business Analysis Document	Document	3.00	8,000.00	24,000.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	3.00	24,000.00	
<input type="checkbox"/>	CWP_Development	Month	10.00	15,000.00	150,000.00	<input checked="" type="checkbox"/>	2.00	30,000.00	0.00	0.00	0.00	0.00	4.00	60,000.00	
<input type="checkbox"/>	CWP-Configuration	Day	6.00	1,250.00	7,500.00	<input checked="" type="checkbox"/>	2.00	2,500.00	0.00	0.00	0.00	0.00	2.00	2,500.00	
<input type="checkbox"/>	CWP-Business Analysis Document	Document	2.00	5,000.00	10,000.00	<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.00	0.00	0.00	1.00	5,000.00	

Approved: 2.00
Invoiced: 0.00
Recognized: 0.00

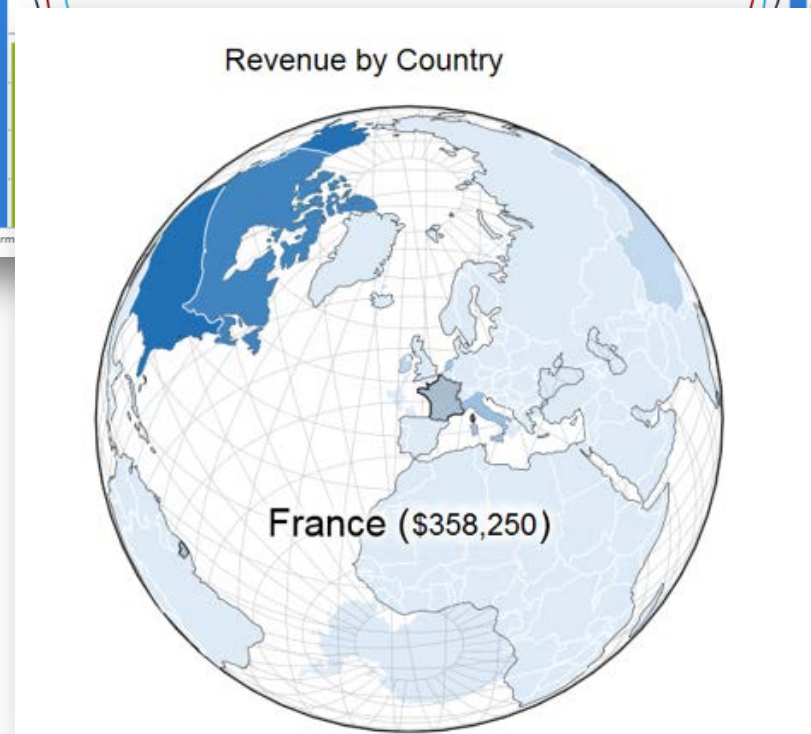
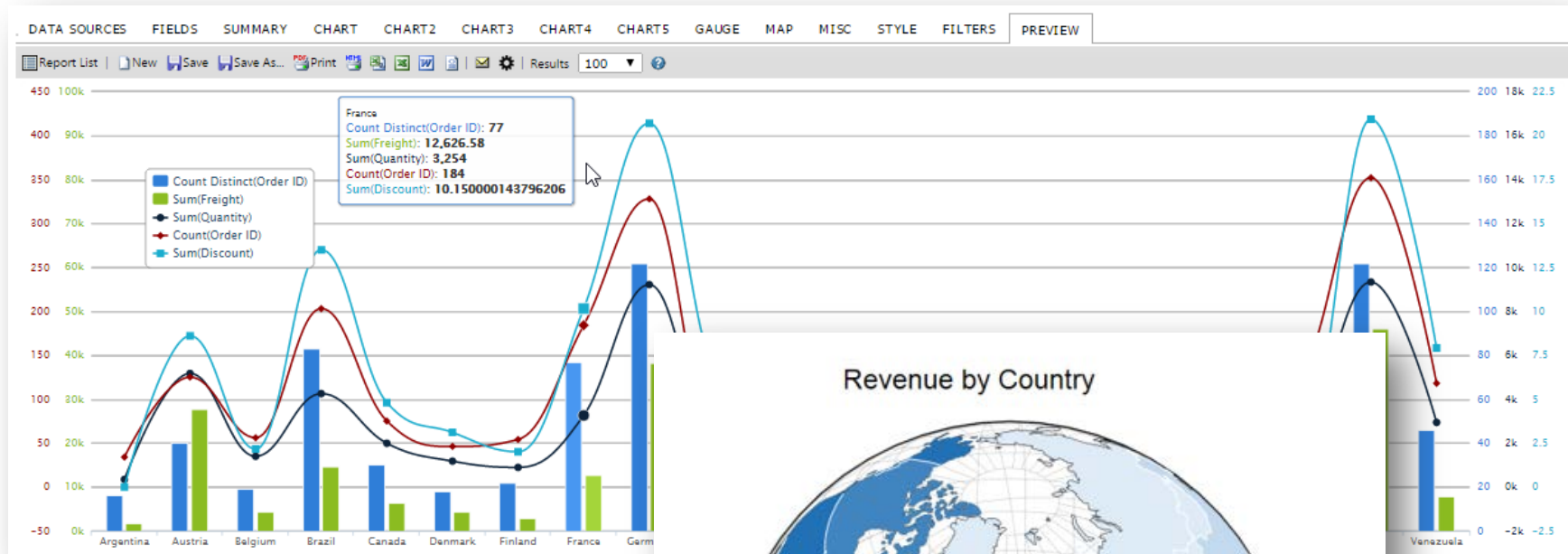
Display 25 items per page Page 1 of 1 (6 item(s))

Upland Analytics Enhancements

- Addition of a brand new visualization layer allows people to create impressive looking reports.
- New Views:
 - Charge Entry
 - Product Entry
 - Product Entry Rules
 - Expense Entry Basic
 - Expense Entry Extended
 - Expense Report Summary
 - Project Status Report



Upland Analytics Enhancements



Financial Planner & Project Team

- Financial Planner
 - Enhanced View Options:
 - Billable Time row and Billable POC (Percentage of completion) row have been added to the Time Section
 - Forecast Revenue using Billable POC or Total POC on a project
- Project Team
 - Forecast Rate Engine
 - Current Support for Hourly Rates Only.
 - Calculations show up in FP only – Roll over to CWP in Next Phase.



Financial Planner

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

Back | Refresh | Export To Excel | Override Template & Forecast Settings

Period: 02/28/2015 02/26/2016 View: Combined Currency: Client Currency \$(USD) Baseline: Current

Time (hrs)

Current100:00

Baseline00:00

Cost (USD)

Current1000.00

Baseline0.00

Billable (USD)

Current1000.00

Baseline0.00

Non-Billable (USD)

Current0.00

Baseline0.00

FY 2015 - FY 2016	Actual Data			Current	Forecast Data										Totals	
	March FY	April FY15	May FY15		June FY15	July FY15	August FY	September	October F	November	December	January F	February	Running Total	Grand Total	
Time																
Role	1.00	2.00	2.00	3.00	3.00	3.00	3.00							17.00	17.00	
Billable Time	0.00	1.00	1.00	2.00	2.00	2.00	2.00	0.00	0.00	0.00	0.00	0.00		10.00	10.00	
Billable Time POC	0.0%	10.0%	20.0%	40.0%	60.0%	80.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%				
Total Time	1.00	2.00	2.00	3.00	3.00	3.00	3.00	0.00	0.00	0.00	0.00	0.00		17.00	17.00	
Total Time POC	5.9%	17.6%	29.4%	47.1%	64.7%	82.4%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%				
Revenue (Fixed Fee with Milestone (maximum override))																
Charge	100.00	100.00	100.00	100.00	100.00									500.00	500.00	
Bonus	100.00	100.00	100.00	100.00	100.00									500.00	500.00	
Milestone Total	2,000.00	2,000.00	0.00	2,000.00	0.00	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00		10,000.00	10,000.00	
Milestone Cumulative Total	2,000.00	4,000.00	4,000.00	6,000.00	6,000.00	8,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00				
Milestone Cumulative % Total	20.0%	40.0%	40.0%	60.0%	60.0%	80.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%				
Recognizable Amount	0.00	1,564.70	1,176.47	1,764.71	1,294.12	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00		9,800.00	9,800.00	
Revenue Sub Total	688.23	1,276.47	1,276.47	1,864.71	1,394.12	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00		10,500.00	10,500.00	
Recognized Amount	200.00													200.00	200.00	
Deferred Revenue	-488.23	0.00	0.00	488.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00	0.00	
Total Revenue	200.00	1,276.47	1,276.47	2,352.94	1,394.12	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00		10,500.00	10,500.00	


Project Team Changes

upland Tenrox

Setup > Work > Projects > Project Edit: 1

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
<input type="checkbox"/>	 Bujokas, Morgan	0.00	\$10/Hour- USD	\$20/Hour - USD	No current rule	No current rule

Timesheet Notes Auto-Saved

The screenshot displays the Tenrox by upland Timesheet application interface. The top navigation bar includes the Tenrox logo, a user profile for 'Smith, Emma - Administrator', and a help icon. The main content area shows a 'My Timesheet' view for the period 06/15/2015 to 06/21/2015, with a 'Timesheet Overview' report selected. A 'Leave Time Summary' section is visible above the 'Timesheet (Open) - Default Timesheet Template' section. The 'Assignments' table lists tasks for 'ACME Corp' with columns for Client, Project, Task, Billable, Payable, ETC, and a grid for days of the week (Mon-Sun) and a Total column. A 'Notes' modal window is open, showing a 'Type: Alert' dropdown, a 'Make Note Public' checkbox, and a text input field with the placeholder 'Type a new note here & tab to auto-save'. Below the input field, it says 'New' and 'Notes will be auto-saved'.

Client	Project	Task	Billable	Payable	ETC	Mon 06/15	Tue 06/16	Wed 06/17	Thu 06/18	Fri 06/19	Sat 06/20	Sun 06/21	Total
ACME Corp	ACME Corp	ACW-1-Client meeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	08:00							08:00
ACME Corp	ACME Corp	ACW-1-Planning					04:00	04:00	04:00	04:00			16:00
ACME Corp	ACME Corp	ACW-1-Analysis					04:00	04:00	04:00	04:00			16:00
ACME Corp	ACME Corp	ACW-1-Analysis											
						08:00	08:00	08:00	08:00	00:00	00:00		40:00
						00:00	00:00	00:00	00:00	00:00	00:00		00:00
						00:00	00:00	00:00	00:00	00:00	00:00		00:00
						00:00	00:00	00:00	00:00	00:00	00:00		00:00
						08:00	08:00	08:00	08:00	00:00	00:00		40:00

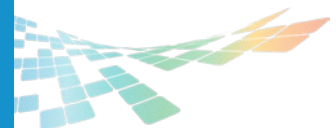
New Grid Control

- Improved controls and a cleaner User Interface for the grids.
 - Modified column terminology design
 - Links on pages being altered to button
 - Search controls moved to right-hand side of page
 - Modified context menu
 - Enhanced sorting
 - Modified column selection design
 - Enhanced date selection options for date based searches



Infrastructure & Architecture

- SSO available for Tenrox Mobile for iOS, Windows Phone and Android devices.
- Currency Exchange API has updated list of supported currencies based on ISO4217.
- Updated Exchange Rate Engine.



Updated Partner Integrations

- Accounting Systems:

- SAGE ERP 300 2014
- Microsoft Dynamics GP 2015



- Customer Relationship Management (CRM):

- Microsoft CRM Online 2015



- Project Management:

- Microsoft Project 2013



Q & A





upland

Enterprise Work Management

Run smoothly. Change quickly. Achieve more.

