

Tenrox 2015 R2 Customer Webinar



Tenrox Product Management

January 2016

Tenrox 2015 R2 – What's New



Today's Speakers



Kevin Sequeira

General Manager & Director of Product Management



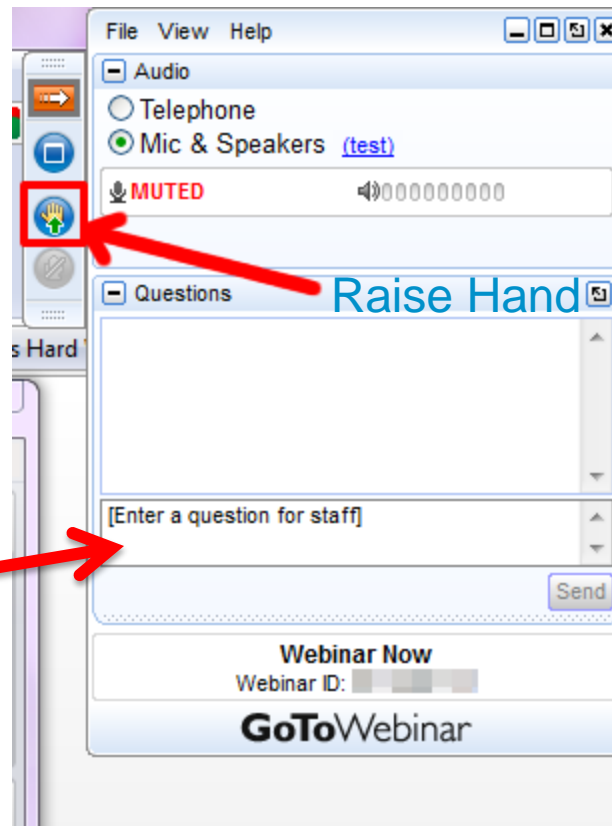
Eric Demers

Senior Solution Consultant



Housekeeping

To submit a question:



Type in your
question here

Raise Hand

Click Send

Send

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TENROX 2015 R2



Guiding Principles



**CUSTOMER DRIVEN
INNOVATION**



STABILITY



SCALABILITY



**QUALITY
INITIATIVES**

Highlights of the Release

- GA Release : Dec 17th 2015
- New Features
 - ✓ Impersonation (Beta)
- Enhancements and Improvements
 - ✓ Tenrox APIs
 - ✓ Timesheet Module
 - ✓ Mobile Application
 - ✓ Financial Planner
 - ✓ Resource Management Module
 - ✓ Architectural Changes
- Updated Integrations



Quick Links

- **Press Release**

- <http://tenrox.com/press-releases/tenrox-by-upland-cloud-professional-services-automation-announces-new-release/>

- **Release Webpage**

- <http://tenrox.com/2015-r2/>

- **Release Notes**

- <http://upland.screenstepslive.com/s/TenroxEducation/m/51692/l/473793-feature-release-notes-for-tenrox-2015-r2-version>



FEATURE OVERVIEW



New! Impersonation (Beta)



Highlights

- Ability to assume the identity of another user and navigate through the tool as that person
- Benefits include:
 - ✓ Better views of use-cases and configured access rights
 - ✓ Improved ability to troubleshoot problems and better support the end-user base



Impersonation (Beta)

to My

Administrator, Master - Administrator

- Update Profile Picture
- Switch User (Beta)
- Settings
- Log Off

Switch User (Beta)

Tenrox by upland

You are impersonating another user. Any actions performed will be logged as theirs. [Learn More.](#)

Smith, Sean - Standard User

Update Profile Picture
Return to profile
Settings
Log Off

Return to profile

Entries > My Timesheet > Smith, Sean

Refresh | Notes | Documents | Copy Timesheet | Assignments | Complete

Period: 11/12/2015 11/18/2015 Report: Timesheet Overview

Leave Time Summary

Timesheet (Open) - Default Timesheet Template

Assignments

Client	Project	Task	Billable	Payable	ETC	Thu 11/12	Fri 11/13	Sat 11/14	Sun 11/15	Mon 11/16	Tue 11/17	Wed 11/18	Total
Non-Working Time													
Adjustments													
Regular						00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Adjustment						00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Overtime						00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Double Overtime						00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Total						00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

Notes

Timesheet History

Tenrox APIs

Highlights

- Allows customers to input and extract data from Tenrox to better automate processes that currently require manual intervention
- Users can effortlessly interact with the Tenrox user interface, through newly published REST APIs
- Enables the development of seamless integrations to 3rd party systems by connecting endpoints for data exchange. Powered by the Upland Integration Manager by Dell Boomi (coming soon)

Timesheet Module Improvements



Empowers the Project Workforce by enhancing the User Experience and helping users make the right decisions with reliable information

- Changes include:

- ✓ Simplified administration of timesheet templates: rule inheritance model
- ✓ Added granularity: assigning template management at a Location Level
- ✓ Deduct multiple leave time tasks from the same leave bank
- ✓ Timesheet Disclaimer (electronic signature)
- ✓ Easier to manage compliance



Timesheet Module Improvements

Setup > Timesheet > Workflows > Timesheet Workflow Edit

General States Transitions Assignments

Back | Save | Security

Name: Standard Time Track

Id:

Alias: STDTIME

Policies Page:

☐ Is a placeholder

☐ Suspended

Description:

States: 4

Transitions: 6

Sinks: 0

Shadows: 0

Transition Edit

Close | Save

General Workflow Roles Processing Notifications Format

Name: Complete *

From State: Open

To State: Submitted

☐ Approval

☐ Rejection

☒ Display message

Apply to the following assignments: Originator

Language: English

Message:

I certify that the time entered in this Timesheet is accurate and complete to the best of my knowledge. Please ensure that your Timesheet is completed prior to submission. Click on Cancel to return to the Timesheet or Ok to proceed with submission.



Timesheet Module Improvements

Leave Time Depletion

Leave Time bank is considered depleted when hours on the Timesheet are:

Entered

☐ Apply depletion rules to leave time adjustments.

Limit user from entering time on the timesheet till the bank for the following leave Time(s) have been depleted

+

New

🗑

Delete

<input type="checkbox"/>	Leave Time
No data to display	

Display

25

▼

items per page

<<

<

Page

1

>

>>

(0 item(s))



New Mobile Enhancements



Improving the User Experience on Tenrox Mobile

- Cleaner view of expenses
- Easily and quickly upload expense receipts
- View PDF attachments directly in the app
- Ability to assign tasks via the mobile app
- Quick View of receipts, facilitating the approval process



Mobile app

Expense Report Details

EXPS-000003

Period:

Nov 01, 2015 - Nov 30, 2015

Total: (3 entries)

1806.93 \$USD

Reimbursable:

1083.48 \$USD

State:

Open

#1 Airfare for ACME-Travel

Nov 02, 2015

Incurred: €EUR 650.00

Reimbursable: \$USD 0.00

#2 Meal (Not Billable) for ACME-Management Meetings

Nov 03, 2015

Incurred: €EUR 75.00

#3 Certification for ACME-Training

Nov 09, 2015

Incurred: \$USD 1000.00

Delete

Edit

Attached Receipt(s)

EXPS-000003:1

☐ Flight Confirmation.pdf

☐ ReceiptPick-2015-11-26T22-27-49.983Z.jpg

Remove

Add

Quot151120.pdf

DOWNSTREAM

QUOTATION

QUOTE NO: July 21, 2003

Page No: 1

Issued for: AULSIE Smith, John ABC Street, John Suburb State 5500 AA

Upstream Rep: Angela Carthy

Date Issued: July 21, 2003

Page: 1 / 1

QTY	PART NO.	DESCRIPTION	EX GST	INC GST	TOTAL
5	83-2170	TAPLE REMOVER, JAWS TYPE	\$100.00	\$110.00	\$550.00
5	83-2171	BINDER, PRESSGANG FOR REPORTS	\$100.00	\$110.00	\$550.00
5	83-2172	STAPLER, ELECTRIC	\$100.00	\$110.00	\$550.00
5	83-2174	BINDER CLIP, 1 1/4"	\$100.00	\$110.00	\$550.00
5	83-22483	STAPLER, HEAVY-DUTY	\$100.00	\$110.00	\$550.00
5	2044383	SCALE TR BONDING, 18" X 24"	\$100.00	\$110.00	\$550.00
5	83-2170	TAPLE REMOVER, JAWS TYPE	\$100.00	\$110.00	\$550.00
5	83-2171	BINDER, PRESSGANG FOR REPORTS	\$100.00	\$110.00	\$550.00
5	83-2172	STAPLER, ELECTRIC	\$100.00	\$110.00	\$550.00
5	83-2174	BINDER CLIP, 1 1/4"	\$100.00	\$110.00	\$550.00

CARTRIDGES 4 PLANETARK

TERMS & CONDITIONS: This guide is valid for 30 days from the date of issue. Payment Terms: T.O.D or Net 7 days from date to pre-approved customers. Invoices & not included in the price. Delivery is free of charge.

Downstream Technology Pty Ltd

VARIABLE ADDRESS ACCORDING TO WHAT IS BEING ORDERED & VARIABLE PHONE/FAX

Previous

Remove

Next

My Timesheet

State: Open

Period Total: 40:00

23/11/2015 - 29/11/2015

Monday 23

Day Total: 08:00

Internal | ACME-Travel

ACME-Travel

08:00

Tuesday 24

Day Total: 08:00

Internal | ACME-Budgeting

ACME-Budgeting

02:00

Internal | ACME-Management Meetings

ACME-Management Meetings

Meeting to discuss 2016 objectives

06:00

Wednesday 25

Day Total: 08:00

Internal | ACME-Budgeting

ACME-Budgeting

08:00

Thursday 26

Day Total: 08:00

Internal | ACME-Budgeting

ACME-Budgeting

04:00

Internal | ACME-Training

ACME-Training

04:00

Today

Complete

Cancel

Search For Tasks

Search By:

Project

ACME

ACME-Budgeting

ACME-Management Meetings

Next

17

Tenrox
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Financial Planner



- Improved performance
- Improved error trapping and notification for end-users

Manual entries were done. Please click on [Refresh](#) to update the details on the Financial Planner.

Setup > Work > Projects > Project Edit: General

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

[Back](#) | [Refresh](#) | [Export To Excel](#) | [Override Template & Forecast Settings](#)

Period: 01/08/2015 31/07/2016 View: Combined Currency: Client Currency \$(USD) Baseline: Current

FY 2015 - FY 2016	Actual Data			Current	Forecast Data								Totals	
	Aug-2015	Sep-2015	Oct-2015	Nov-2015	Dec-2015	Jan-2016	Feb-2016	Mar-2016	Apr-2016	May-2016	Jun-2016	Jul-2016	Running Total	Grand Total
Time														
Role				16.00	24.00								40.00	40.00
Team Member				16.00	24.00								40.00	40.00
Administrator, Master				16.00	24.00								40.00	40.00
Billable Time	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Time	0.00	0.00	0.00	16.00	24.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	40.00	40.00
Revenue (Time & Material)														
Charges				7,777.00	5,555.00	-1,000.00	-2,000.00						10,332.00	10,332.00
Discount						-1,000.00	-2,000.00	2,000.00					-3,000.00	-3,000.00
Fixed Billing				7,777.00	5,555.00								13,332.00	13,332.00
Recognizable Amount	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue	0.00	0.00	0.00	7,777.00	5,555.00	-1,000.00	-2,000.00	0.00	0.00	0.00	0.00	0.00	10,332.00	10,332.00

Resource Management Module



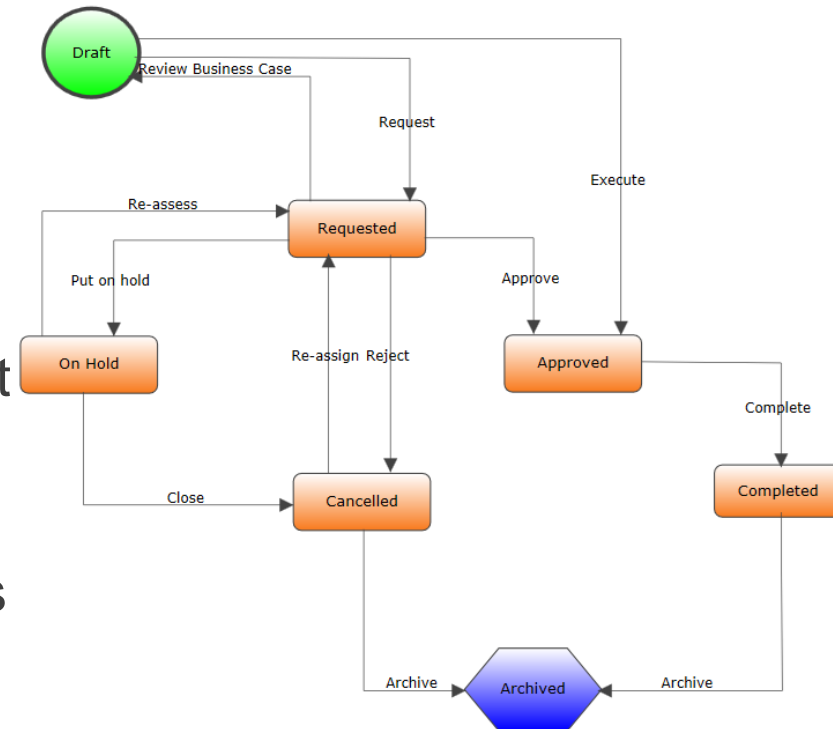
- More effective reporting: Planned Non-Working hours available in the legend
- View hours that are marked as non-working hours on an individual's calendar



Architectural Changes



- Introduction of a globalized stylesheet
- Upgrade of our .NET Entity Framework to the latest version
- Workflow Viewer from Silverlight to HTML5
- Ability to view workflow statuses in non-IE browsers



Updated Partner Integrations

- Accounting Systems:

- ✓ QuickBooks Online 2016
- ✓ QuickBooks Desktop 2016



Q & A





upland

Enterprise Work Management

Run smoothly. Change quickly. Achieve more.

