

Changepoint 2022 Release Notes

Product	Changepoint SA
Version	2022
Date	January 2022
Description	Key enhancements include a redesign of the navigation menu, and the new user interface design for the entity lists for customers, opportunities, contracts, and projects.

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Installation and upgrade instructions

For complete information on installing or upgrading to Changepoint 2022, see the *Changepoint Installation Guide*.

Important: Be sure to request the *Differences* documents for your upgrade path from your Changepoint CSM or customer care representative so that you can ensure that all schema differences are identified and addressed prior to upgrading.

System Requirements

Software

For a complete list of the supported software configurations, see the Changepoint 2022 *Software Compatibility Matrix*, which is available from the Customer Success Center (https://success.planview.com/Planview_Changepoint).

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Hardware





For a list of recommended hardware configurations, see the *Changepoint 2022 Hardware Recommendations*, which is available from the Customer Success Center (https://success.planview.com/Planview_Changepoint).

New and changed functionality



Redesign of user interface

Navigation enhancements

The navigation bar includes the home icon, apps menu icon, custom menu icon, main entity list options, search icon, notifications icon and user menu icon. Intelligent Forms and custom section items that existed prior to this release are moved to the Custom menu .

Menu item	Description
	Home page. The initial view when you first launch Changepoint displays your default dashboard.
	Apps menu. Includes all of the components and entities other than the main entities such as: Recents , Dashboards , Time Sheet , Calendar and Expenses , etc.
	Custom menu. Includes custom menu items and standard and custom Intelligent Forms.
Entity options	Options to access list views for the following entities: <ul style="list-style-type: none"> • Customers • Opportunities • Projects • Contracts • Invoices • Requests
	Search. The global search, knowledge search, and support search are all available from one location.

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Menu item	Description
	Notifications. Alerts for notifications appear here.
	User menu. The user-specific components such as My settings , Help , Customer Success Center , Sign out , and Administrator view .


New entity list views

Changepoint 2022 introduces the initial phase of the entity list views for the following entities:

- contracts
- customers
- opportunities
- projects

Note: The **Projects** tree view is still available for users who require access to task-level resource requests.

General


- Added Favorites and Recents to entity list views
- **Add to favorites** icon  added to entity profiles
- Removed the **New look** option from entity profiles
- Removed the following tree views:
 - contracts
 - customers, leads, prospects
 - opportunities

Note: Due to the removal of tree views, some functionality has changed or is no longer available. For example, you can view a list of prospects by filtering the customer list view by the sales status of “Prospect,” and it is no longer possible to view customers by sales region.

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- **Recents** list changes:
 - Maximum number of recently accessed items is 36 items per entity (used to be 15)
 - When you pin an item, it is also added to the favorites for the entity. The maximum number of pinned items is 24 total.

Changepoint Administration

- Removed the options to display the new interface from Changepoint Administration (**User Interface > Display options**).
- Custom menu sections can be added to the Custom menu  only. Custom sections and custom section items cannot be added to any other menus in Changepoint.

Product retirement

Changepoint 2020 and Changepoint 2017

Support for defect fixes for Changepoint version 2020 will end 120 days after the release of Changepoint 2022.

Support for defect fixes for Changepoint version 2017 (GA, SP1, and SP2) ended on December 31, 2021.

Note: General support is still available on all versions of the software to customers who have maintenance agreements.

Deprecated features

The following features have been dropped from this release:

- activities
- asset management
- campaign calendar

Changepoint media

The Changepoint media contains the following:

- Core Changepoint installer, related files, and tools

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The online help installer contains the following:

- Online help installer and files in English only.

Release and product documentation

The release and product documentation are available in the Customer Success Center (https://success.planview.com/Planview_Changepoint) or from your Changepoint client services representative or client manager.

Note: The release documentation and product documentation are available in English only.

Release documentation

- *Release Notes*
- *Changepoint Installation Guide*
- *Changepoint Software Compatibility Matrix*
- *Changepoint Hardware Recommendations*

Technical reference and integration guides

- *Changepoint API Installation Guide*
- *Changepoint API Reference*
- *Integration Framework Reference*
- *Transport Tool User Guide*

User guides

The following guides are available in PSA and PPM versions, unless indicated otherwise.

- *Budgeting Management User Guide*
- *Client Portal User Guide*
- *Client and Contact Management User Guide (PPM only)*
- *Contract Management User Guide (PSA only)*
- *Customer and Contact Management User Guide (PSA only)*
- *Customer Relationship Management User Guide (PSA only)*
- *Initiative Management User Guide (PPM only)*

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- *Financial Management User Guide*
- *Mobile App Quick Start Guide*
- *Mobile Quick Reference Guide*
- *Performance Management User Guide*
- *Portfolio Management User Guide (PPM only)*
- *Project Management User Guide*
- *Request Management User Guide*
- *Resource Management User Guide*
- *Revenue Management User Guide*
- *Time and Expense Management User Guide*
- *User Basics User Guide*

Administration guides

The following guides are available in PSA and PPM versions, unless indicated otherwise.

- *Changepoint Administration Guide*

User references

The following guides are available in PSA and PPM versions, unless indicated otherwise.

- *Security Access Reference*
- *Changepoint Analytics Reference*

Upgrade paths

The complete details for upgrading are in the *Changepoint Installation Guide*.

You can upgrade to Changepoint 2022 from the following versions only:

- Changepoint 2021
- Changepoint 2020

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Upgrade considerations

Upgrading IBM Cognos Analytics to 11.2

After upgrading to IBM Cognos Analytics 11.2, Analytics dashboards that include tabs might not load.

To avoid this issue, download the latest version of the TabWidget extension from the following link:

[https://community.ibm.com/accelerators/catalog/content/Support-for-dashboard-zoom-\(11.2.0-and-above\)](https://community.ibm.com/accelerators/catalog/content/Support-for-dashboard-zoom-(11.2.0-and-above))

Follow the instructions on the website for downloading the extension and then uploading it to Cognos Analytics.