

Changepoint 2017 SP1

Caveats and Known Issues



Product	Changepoint
Version	2017 SP1
Release Date	March 2018

2017 SP 1 Caveats

Caveats are issues that have been determined to be working-as-designed, tips, and warnings for using Changepoint. Caveats are listed to provide clarification, and in some cases, solutions to assist customers.

Product Area	Caveat Description
APIs	<p>[Changes to Changepoint 2017 Web Services API] As of 2013, Microsoft no longer supports Web Service Enhancements (WSE).</p> <p>As a result, in Changepoint 2017 and later, the Changepoint Web Services API will be installed with WCF as its default configuration. In addition, the Changepoint 2017 API no longer installs Microsoft Web Service Enhancements 2.0 as part of its installation.</p> <p>Customers must download the WSE 2.0 directly from Microsoft site. In order to stay current with the supported technology, it is strongly recommended that customers convert or develop their web services interface using WCF instead of WSE.</p> <p>If, however, a customer decides to stay with WSE, upgrading to the Changepoint 2017 API will change the Changepoint Web Services API configuration in Web.config to WCF.</p> <p>To re-enable the WSE, the Changepoint Web Services API configuration must be updated. Please refer to the Changepoint API Installation Guide for instructions. This step must be performed to prevent all interfaces that use WSE from failing.</p>
Budgeting	<p>If a user with "Unlock Records" rights manually unlocks the budget, the message: "The budget has been locked by [User]" will not be displayed and the budget will be editable, which may cause the Resource Demand Calculation job to fail the next time it is run.</p>
Cognos	<p>Some Changepoint users may not be visible in the Cognos Users listing. To confirm Changepoint users, navigate to: IBM Cognos Administration, Security tab, Changepoint, Users and review the listing of resources. If there are missing Changepoint users, re-start the IBM Cognos service on the Cognos App Tier and the users will then appear.</p>
Cognos	<p>Rendering a Financial Summary Model report takes a long time when a user combines a currency column from a Common model with columns from a sub-model. Solution: Use the currency code column on the sub-model instead of the currency description column from the Common model.</p>

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Cognos	<p>If a report was defined to use a custom query as a data source (e.g. SELECT * FROM xxxx_view), then when the report is saved, the Cognos engine populates the full column list from the query and saves them as part of the report definition.</p> <p>Prior to Cognos 10.2.2 FP4, the engine does not verify the column list with the actual columns list from the view, even if the view columns have been modified. This behavior has been changed for Cognos 10.2.2 FP7. Cognos throws an error if the query output column list does not match the saved list even if the modified column was not used by the report.</p> <p>As a workaround, the report owner can open the report from Report Studio and verify the custom query (which will trigger Cognos to update column list), and then save the report again.</p> <p>As a coding best practice, it is recommended that you avoid code like SELECT *, and replace it with a specified required column list (like SELECT CustomerId, ProjectId... FROM xxxx_view or xxx table).</p>
Customers and Contacts	<p>When URLScan is enabled, typing <> (angled brackets) as a filter criteria in any tree view causes a "Server Error in Application" error. Users should enter valid search criteria and avoid these special characters.</p>
Expense Entry	<p>Expense Template: Error 1001 when trying to Install Changepoint Excel Expense Template.</p> <p>If you encounter this error, you must use Control Panel to uninstall the Changepoint Excel Expenses Template (if exists) and the Microsoft Visual Studio 2010 Tools for Office Runtime and Microsoft Visual C++ 2010 Redistributable (if exists).</p> <p>Then reinstall the Excel Template from Changepoint Preferences as before. Should you encounter the same issue again or fail to complete the installation, ensure that you have .NET Framework 4.0 installed.</p>
Expense Entry	<p>Expense Template: Creation and updates to expenses are one way only, from Excel to Changepoint. Existing expenses are not uploaded to Excel; they must be created in Excel to appear in the worksheet.</p> <p>If you edit expenses in Changepoint, those edits will not be uploaded back to Excel for existing expenses. You should make the edits in Excel and re-synchronize. If you want to make edits in Changepoint, you should remove the expenses from the Excel workbook, otherwise you risk over-writing your changes if you synchronize the expense again from Excel.</p>
Expense Entry	<p>During installation of the Changepoint Excel Expense Template (from 'Add-in installations' in your Preferences page), if you get the following error "'Unable to install this application because an application with the same identity is already installed" run the following in command prompt on the affected client: rundll32 dfshim CleanOnlineAppCache/</p>

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General Usability	The MSP Date Range option is removed on subsequent linking to MSP. The removal of the date range option is on subsequent linking from Changepoint to MSP to avoid related data corruption.
General Usability	<p>When creating or modifying entities in Changepoint, users may be prompted with form fill values in the drop-down fields. Selecting these values may cause a validation message to appear when trying to save or update items in Changepoint.</p> <p>Solution:</p> <ol style="list-style-type: none"> 1. Disable the form fill option in your browser. 2. Use the drop-down arrow to select your value instead of using the form fill.
General Usability	<p>Firefox browser: User is unable to select or copy text from non-input fields in Changepoint dialog boxes. This is a browser (Firefox) limitation. An existing bug against Firefox regarding this has been opened, please reference the link below.</p> <p>https://bugzilla.mozilla.org/show_bug.cgi?id=195361</p>
Misc.	<p>Certain types of links in team folders are supported by different browsers as follows:</p> <ul style="list-style-type: none"> * http and https – all browsers * ftp – Internet Explorer and Firefox * shared folders – Internet Explorer only
Mobility Clients	Formatting of numeric values on iPod Touch and iPhone. Numeric values of a thousand or higher, or where separators are required, will display on two lines instead of one. For example, the value of 1,010.000 will display as: 1, 010.0000
Mobility Clients	Viewing of expense/expense report attachments on your mobile device is restricted to the supported file type attachments for your device. If your device does not support a file type, you will encounter a loading message in Changepoint and the attachment will not render.
MSP Interface	The projects accessed from the Recent List in Microsoft Project are not linked to Changepoint and will not update any information in Changepoint. To access linked MSP projects, users must use the "Link Changepoint project" menu item in Microsoft Project.
MSP Interface	Users may experience slow performance in the MSP interface if there are many work locations or other drop-down list items available for the project. MSP has a limitation of 5,000 for drop-down list items, so Changepoint will retrieve a maximum of 5,000 items to populate in MSP for each drop-down list field. This action could take considerable time to complete. For optimal performance, users should reduce the selections of available work locations in the project; in particular, do not select "all locations".

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MSP Interface	An exception error appears when an older version of a MSP linked project has been converted and saved in a higher version and the user tries to open it using an older version, for example, MSP 2007.
Project Management	After copying a project, you must manually refresh the project tree view to see the newly-created project.
Project Management	For tasks created in components other than PPW, such as the Project Worksheet, task dialog, MSP, RMW, project quick plan, the duration shown on PPW will be set to the number of working days between the planned start and planned finish. The existing 'Duration' field on the Project Worksheet is not saved and is only used in the 'calculate' options (e.g. calculate finish date by filling in the duration field).
Project Management	Planned hours daily distribution shows 3 decimals on Project Planning Worksheet (and Project Worksheet). However the total planned hours remains unchanged as input by the user, and data in DailyDistribution table was saved in 5 decimals.
Exchange Server Integration	<ol style="list-style-type: none"> 1. Outlook event type 'free' and 'working elsewhere' are not synced to Changepoint. 2. Tasks that are added to the calendar are created as multi-day appointments in Outlook that span the task assignment planned start and planned finish. The effort allocations, whether entered in daily allocations or 'recurring' effort allocations, are not synchronized to Outlook. 3. After recurring events or multi-day events are synced to Changepoint, they cannot be edited in Changepoint.
Reports	<p>Cognos BI report creation using Report Studio and filtering: Should you encounter the following error "Error: Unable to get value of the property 'CG9': object is null or undefined", follow these steps to eliminate the error:</p> <ol style="list-style-type: none"> 1. In Filter Condition dialog click on the arrow beside Search button. 2. Unselect Automatically Populate Value List. 3. Use manual filter item creation. (Click on new icon, enter value manually into the box and click OK).
Reports	<p>The Reports tree view is not refreshed when the report is opened in Changepoint, and the report is updated or deleted, or a new report is created using Report Designer.</p> <p>Workaround: Sign out of and then into Changepoint.</p>

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Reports	<p>Report creation using Cognos BI models for Financial Analysis Record Types 11, 12, 13 and 14. [FinAnn_AllByCustomerByDailyRaw].[Non-Weighted Opportunity Services, expenses/product/fixedfee (rectype 11,13)]</p> <p>[FinAnn_AllByCustomerByFiscalRaw].[Non-Weighted Opportunity Services, expenses/product/fixedfee (rectype 11,13)]</p> <p>[FinAnn_AllByCustomerByMonthlyRaw].[Non-Weighted Opportunity Services, expenses/product/fixedfee (rectype 11,13)]</p> <p>[FinAnn_AllByCustomerByDailyRaw].[Weighted Opportunity Services, expenses/product/fixedfee (rectype 12,14)]</p> <p>[FinAnn_AllByCustomerByFiscalRaw].[Weighted Opportunity Services, expenses/product/fixedfee (rectype 12,14)]</p> <p>[FinAnn_AllByCustomerByMonthlyRaw].[Weighted Opportunity Services, expenses/product/fixedfee (rectype 12,14)] The ProjectID column in the "common" section will contain the value for the OpportunityServiceId, which can be used for custom join purposes, if necessary. For all other record types, the ProjectId column will contain the projectid.</p>
Reports	<p>Cognos BI Models reports for: Financial Analysis By Customer, daily Financial Analysis By Customer, monthly Financial Analysis By Customer, by fiscal period</p> <p>Access checking for these models is implemented at the customer level only. Access check does not include engagement or opportunity access and therefore reports that are generated from these models will display financial information from all engagements and opportunities for a given customer, provided the user has access to the customer.</p>
Reports	<p>The Profile Link is not supported for second-level Cognos reports.</p>
Reports	<p>Existing Cognos reports that are created using Financial Analysis Summary models display incorrect labels when opened in design mode. However, the correct labels will show when the report is rendered. To correct the labels on the report in design mode, the author needs to delete the column and add a new one with the correct name.</p>

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Reports	<p>There may be rounding issues when Days or FTE values are used on reports created in Report Designer or Cognos. This is because the calculation mechanism was changed. Decimal values are capped in the DailyDistribution table. The following views have this rounding issue:</p> <p>DS_DemandAndCapacity DS_RD_ProjectResources_AllDays DS_RD_ProjectResources DS_RD_ProjectResourceInfo DS_RD_ProjectTeam DS_RD_ProjectTeam_AllDays DS_RD_RequestDemand DS_RD_RequestDemand_Allday DS_RD_RequestInfo DS_RD_ServiceFiscalInfo DS_RD_ServiceInfo.sql DS_RD_Services DS_RD_Services_AllDay</p>
Resource Management	<p>When working with certain entities (request, product, customer, support item, project, contact, opportunity, engagement, user setup, and so on), in Inline mode only, if the first section has a very long name, the section itself may disappear if the 'display view' area is manually resized to be smaller. (This can be the case when the Folders view is resized to be much larger than the default). Customers can rename the section, users can use the tabbed format or can refrain from resizing the folders area while using the Inline format.</p>
Resource Scheduling Worksheet (RSW)	<p>Lock gets removed when an entity is edited then closed in Enterprise in inline mode, while the same entity is edited on RSW. If this happens, user will encounter an error when saving on RSW.</p>
Sales/ Opportunities/ Candidates	<p>If very small amounts of effort are used on a large date range (for example, a date range of a year with only two hours planned effort), then the calculated 'average' billing and cost rates may be slightly different than the rates entered, and a small discount may be calculated. This is unavoidable because of the calculations involved:</p> <ol style="list-style-type: none"> 1. The effort is allocated to each fiscal period. 2. The effort amount in each fiscal period is then multiplied by the billing/cost rates to obtain the extended billing/cost amounts. 3. The extended billing and cost amounts are rounded to two decimals. 4. The extended amounts are then summed up to become the 'total billing/cost' amount. This is divided by the total effort to obtain the average billing/cost rate.

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Sales/ Opportunities/ Candidates	In the scenario comparisons worksheet, when a configurable field with conditional properties is set to hidden, the field is initially displayed because conditions for configurable fields are resolved only after the row is locked.
Sales/ Opportunities/ Candidates	The new AutoUpdateRate flag for opportunityservice will be set to true only for newly created or modified opportunity service records when the billing office rate is used after a fiscal period is added to an opportunity. In all other cases, the AutoUpdateRate flag for existing opportunity service records will be set to false.

2017 SP1 Known Issues

Product Area	Request number	Known Issue Description
APIs	CPC-2013-10930	Most API input fields are not trimmed. Therefore name fields that are used to look up IDs might not find a match if there are leading or trailing spaces in the input.
Architecture	CPC-2013-02160	The date format has been changed to YYYY-MM-DD when using the English-CA browser language. This is because the date format was changed by Microsoft in Windows 2012. Users will encounter inconsistencies in date formats in the following areas when using the English-CA browser language on Windows Server 2012 and Windows Server 2012 R2: - Create/edit invoice; the service item in the Time tab has date shown in MM/DD/YYYY format. - Export to Excel from the following areas: project worksheet, resource management worksheet, edit task assignment, create expense, view expense report, portfolio, report scheduling, candidate screening, and the non-working day setup in system manager.
Architecture	CPC-2014-03752	Using square brackets ([]) in filter criteria in the following Changepoint Administration tree views results in incorrect search results, or no results found. Reporting > Data Provider Configuration User Interface > Configurable Field Layout
Engagements	CPC-2014-02346	Access checking is inconsistent in the quick search and engagement tree view. Users without the "View customers" feature can view the engagement name in the quick search results but cannot access the link to the profile page from the tree view.

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Exchange Server synchronization	CPC-2014-08144	Client-side synchronization for calendar-- Appointments marked in Outlook as 'Work elsewhere' will not synchronize to Changepoint calendar. The 'Work elsewhere' drop-down value is available for selection in Outlook from: Appointment tab - > Show As drop-down field. Solution: Choose an alternate value from this drop-down field to display how your appointment is marked in calendar.
General Usability	CPC-2013-07494	The Changepoint Mail Service stops functioning if the body of the defined email contains the character Ÿ.
General Usability	CPC-2014-00787	No results are returned when searching by subproject in the timesheet tree view if the subproject does not match the main project.
Intelligent Forms	CPC-2017-00408	On the Create Engagement form, the Billing Office drop-down field does not conform to the security access check to display a filtered list of Billing Office values, based on the logged in resource.
Intelligent Forms	CPC-2017-00418	Forms that are partially completed in any supported language other than English display the form values in English when the user accesses the partially completed form after saving it. The form cannot be submitted because the data fails the validation checks on the date and number formats.
Intelligent Forms	CPC-2017-00446	User gets errors when signing in to Intelligent Forms > Manage the very first time. The error reads as below: Server Error in '/Infiniti/Manage' Application. The provided anti-forgery token was meant for user "", but the current user is "1". Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code. Workaround: Signing in again.
Intelligent Forms	CPC-2017-00478	When the browser language is set to French, the message that appears when a partially-completed form is saved contains encoded characters.
Intelligent Forms	CPC-2017-00480	On the Creating Project Request form, users can select a different support desk than the one set on the engagement, even when the option to allow overrides has not been selected on the engagement.

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Investment Planning	CPC-2014-08149	Actuals are not populated in ScenarioComparisonTotals table based on the funding sourceid associated on project when the budget is used for funding demand calculation, and the funding source associated on project is different than the funding source associated on budget. Workaround: Associate the same funding source on the project and budget when the budget is used for funding demand calculations.
Mobility Clients	CPC-2014-07217	After the password settings are changed by the Changepoint administrator, users are able to sign into Changepoint using a mobile device without requiring the minimum number of numeric characters.
Mobility Clients	CPC-2014-07481	Support Search error on Android tablet and SSO (PingFederate) configuration. After you do a Support Search and then view a selected item from the results, the back button fails with 'Arithmetic operation resulted in an overflow' error. Workaround: Perform the Support Search again in order to view additional support search items.
Mobility Clients	CPC-2017-00841	On the Mobile App, when the language used on the device is different than the unilingual language setting on the server, some labels are in the language used on the device.
MSP Interface	CPC-2014-01121	In MSP, using cut and paste multiple times can cause tasks to be deleted from Changepoint. Users should ensure they set 'Update CP' to 'Yes' before saving to ensure the information is correctly updated in Changepoint.
Portfolio Planning	CPC-2014-08735	Using the 'Change status' option from opportunity analysis (candidate screening) results in a web page error "Unable to get property 'hidOppid'. After acknowledging the error several times, a user can successfully change the status.
Project Planning Worksheet (PPW)	CPC-2016-04248	In PPW, if you assign a resource to a task and then remove the resource from preferred resources without saving the task, the resource will disappear from the Resource drop-down but is still assigned to the task when the project is saved.
Project Planning Worksheet (PPW)	CPC-2017-00483	The billing (cross charge) and cost rates are not immediately refreshed when a billing role (staffing level) is changed in a task assignment view. Click Apply to save and refresh PPW.
Project Planning Worksheet (PPW)	CPC-2017-00484	In a task view, the length of the bars in the Gantt chart are incorrect when no resource is assigned to the task.

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Project Planning Worksheet (PPW)	CPC-2017-00487	PPW does not support inter-project dependencies. The project worksheet or task dialog can be used to ensure the dates are shifted in the successor projects and tasks.
Project Planning Worksheet (PPW)	CPC-2017-00858	Task and task assignment field values are not inherited by new task assignments. Workaround: • Create a task view and a task assignment view that contain the desired fields. Make the task assignment view your default view. • Load PPW. Switch to the task view to add or change data.
Project Portfolios	CPC-2014-07744	When a user creates a portfolio and adds items, the automatic calculation of weighting as each item is added is incorrect. Workaround: Users can click the 'auto weight' button to correct the weightings after all items have been added.
Project Worksheet	CPC-2014-08098	When using a German locale and browser language, and exporting data to Excel from the project worksheet, the predecessor and successor task fields are converted to date format
Report Designer Data providers	CPC-2014-07798	The financial analysis summary calculations do not include completed projects or subprojects for billable and unbillable planned effort (record types 28 and 42). If reporting on those projects is desired, they can be set to another status such as inactive.
Report Designer Data providers	CPC-2014-08519	The financial analysis summary 'Effort (days)' calculation does not reflect the new option 'group by project and resource'.
Report Designer Data providers	CPC-2014-08690	When a resource has no rates set up, time associated with that resource will not be included 'Non-billable time/RequestTime' (record type 9). The information can be found in 'Non-billable time by task assignment' (record type 35).
Report Designer Tool	CPC-2013-03236	Export to Excel from Report Designer fails if a large text field contains a carriage return. The carriage return can be removed or Cognos can be used as an alternative.
Report Designer Tool	CPC-2013-06235	The buttons may be cut off in some Report Designer dialogs. Users can use the Tab key to access them.
Report Designer Tool	CPC-2013-07231	Groups in a Report Designer report do not expand when the numeric values have a large number of decimal places. As a workaround, the data can be rounded to fewer decimal places.

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Report Designer Tool	CPC-2014-03633	In some cases, selecting fields from a primary and detailed secondary provider causes an over-statement of the numeric values from the primary provider. For example, using the 'Forecasted revenue' field from opportunity and total billing amounts from opportunity services causes the 'forecasted revenue' field to be over-stated. Workaround: Users can set the field to 'do not group and calculate' to avoid the over-statement.
Reports	CPC-2012-04776	The 'Time' data providers and Cognos query subjects exclude time records that are associated to deleted workgroups. If you want to include time records in reports, rename workgroups as "Do not use" instead of deleting them. Or you can use the unsecured Cognos data model, which does not do any access checks on the data.
Reports	CPC-2013-01573	When a scheduled report's locally scheduled time is not the same as UTC, and the offset between the local time zone and UTC is greater than the time difference between the last rundate and midnight, it is possible that the next run date will be calculated incorrectly.
Reports	CPC-2013-10048	The 'Time and expenses by selected client' report will return a web page error if too many workgroups are selected. Users can refine their selections or use another report, such as one created in Cognos or Report Designer.
Resource Management	CPC-2014-05805	When creating a calendar entry, clicking a date that is outside the current month will cause the dates on the calendar to default to one month later. Users should move the calendar to the next month before creating the entry, or change the dates once the calendar has been launched.
Resource Management	CPC-2014-08702	Trying to render the Resource History report for a resource will either not return any data or fail with a webpage error. This report is accessed from the Resource Management - Resource History report. Solution: Navigate to the resource profile instead and select the Resource History report from the Actions menu.
Resource Scheduling Worksheet (RSW)	CPC-2018-00301	"Unrecognized Guid format" error when opening the profile page for a new resource request from RSW before the workflow job has been run.
Resource Scheduling Worksheet (RSW)	CPC-2018-00307	When an opportunity service item is moved from one resource to another, the source item's cost rates are copied over to the target item, even if the source resource and target resource have different cost rates or burden rates.

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Resource Scheduling Worksheet (RSW)	CPC-2018-00313	Scrolling of the Resource Scheduling Worksheet using the mouse wheel does not work when the mouse is over the info or Workgroup column.
Revenue Recognition	CPC-2014-08218	The Revenue Recognition Summary report (#7) does not include revenue adjustments when calculating the company totals. However, adjustments are taken into account when looking at other totals for example, the totals per billing office and the total per engagement.
Sales/Opportunities/Candidates	CPC-2014-02349	Access checking is inconsistent in the quick search and Leads tree view. Users without the "View customers" feature can view the lead name in the quick search results but cannot access the link to the profile page from the tree view.
Support Desk / Requests	CPC-2014-08631	Engagement configurable fields are not displayed in the Request 'additional fields' section when enabled.
System Administration	CPC-2013-05172	Email notifications based on configurable fields plus other entity fields may not be correctly evaluated and the email will not be sent. Administrators can use a SQL select statement as an alternative to the UI conditions.
System Administration	CPC-2014-08320	When an engagement configurable field is added to a new billing office, the existing metadata setting for 'hidden' and 'not editable' is not preserved. Administrators must manually set the values instead.