Changepoint 2017
Caveats and Known Issues

Product	Changepoint
Version	2017
Release Date	April 2017

2017 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	[Changes to Changepoint 2017 Web Services API] As of 2013, Microsoft no longer supports Web Service Enhancements (WSE). To reflect this change, starting Changepoint 2017, Changepoint Web Services API will be installed with WCF as its default configuration, from Web Services Enhancements (WSE) from prior releases. In addition, Changepoint 2017 API will no longer install Microsoft Web Service Enhancements 2.0 as part of its installation. Customer is required to download the WSE 2.0 directly from Microsoft site. It is highly recommended that customers convert or develop their web services interface using WCF, instead of WSE, in order to stay current with the supported technology. If, however, 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. To re-enable the WSE, Changepoint Web Services API configuration must be updated. Please refer to the Changepoint API Installation Guide for the instruction. If this step is not performed, any interfaces that utilize WSE will fail.
Budgeting	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.
Cognos	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.
Cognos	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.

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Cognos	If a report was defined to use a custom query as a data source(e.g. SELECT * FROM xxxx_view), when the report is saved, the Cogno engine will populate the full column list from the query and save them as part of the report definition; prior to Cognos 10.2.2 FP4, the engine won't verify the column list with the actual columns list from the view (even if the view columns have been modified); however this behavior has been changed for Cognos 10.2.2 FP7. Cognos will throw an error if the query output column list does not match with the saved list even if the modified column was not used by the report. As a work-around, the report owner may open the report from Report Studio and verify the custom query, which will trigger Cognos to update column list, then save the report again. As a coding best practice, it is recommended that you avoid code like SELECT *, and should replace it with a specified required column list (like SELECT CustomerId, ProjectId... FROM xxxx_view or xxx table).
Customers and Contacts	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.
Expense Entry	Expense Template: Error 1001 when trying to Install Changepoint Excel Expense Template. 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). 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.
Expense Entry	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. 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.
Expense Entry	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
General Usability	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. Solution: 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	Firefox browser, user is unable to select/copy text from non-input fields in dialogs within Changepoint application. This is a browser (Firefox) limitation. An existing bug against Firefox regarding this has been opened, please reference the link below. https://bugzilla.mozilla.org/show_bug.cgi?id=195361

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Misc.	Certain types of links in team folders are supported by different browsers as follows: * 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
MSP Interface	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.
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".
Project Management	After copying a project, you must manually refresh the project tree view to see the newly-created project.
Project Management	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	For tasks created in UIs other than on Project Planning Worksheet, such as on the old Project Worksheet, task dialog, MSP, RMW, project quick plan etc, the duration shown on the Project Planning Worksheet will be set to the number of working days between the planned start and planned finish. The existing 'Duration' field on the old 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.
Reports	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: 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	The Report tree view is not refreshed when the report is opened in Enterprise, and the report is updated or deleted or a new report is created using Report Designer. Solution: Sign out of and then into Enterprise.

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Reports	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)] [FinAnn_AllByCustomerByFiscalRaw].[Non-Weighted Opportunity Services, expenses/product/fixedfee (rectype 11,13)] [FinAnn_AllByCustomerByMonthlyRaw].[Non-Weighted Opportunity Services, expenses/product/fixedfee (rectype 11,13)] [FinAnn_AllByCustomerByDailyRaw].[Weighted Opportunity Services, expenses/product/fixedfee (rectype 12,14)] [FinAnn_AllByCustomerByFiscalRaw].[Weighted Opportunity Services, expenses/product/fixedfee (rectype 12,14)] [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.
Reports	Cognos BI Models reports for: Financial Analysis By Customer, daily Financial Analysis By Customer, monthly Financial Analysis By Customer, by fiscal period 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.
Reports	The Profile Link is not supported for second-level Cognos reports.
Reports	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.
Resource Management	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.
Sales/ Opportunities/ Candidates	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. There is unavoidable because of the calculations involved: 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.
Sales/ Opportunities/ Candidates	In the scenario comparisons worksheet, a configurable field with conditional properties set to hide it, will initially be displayed. Conditions for configurable fields are resolved only when the row is locked. Therefore the configurable field will be hidden when the row is locked.

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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.
Workflow	Workflow layout printing restrictions: In order to print your state/process workflow layout you need to move all objects into your print area. If using Chrome browser you will also need to remove your margins (set the setting to none) prior to printing. If using Firefox browser or Microsoft Internet Explorer, additional blank page(s) will be printed.

2017 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 treeviews results in incorrect search results, or no results found. Reporting > Data Provider Configuration User Interface > Configurable Field Layout
Engagements	CPC-2014-02346	The quick search and engagement tree-view are inconsistent in access checking. 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.
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.

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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 dropdown 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 created and saved, using Intelligent Forms, in any supported language other than English will only render the form values in English locale upon re-access to the saved form. In this case user is not able to submit the form data as the form would fail the validation check on date and number formats. However, this issue does not exist if the user created, updated, and submitted a form in a single process step, without having to save first and then re-access the form at a later time.
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. Solution: signing in the subsequent time works fine.
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.
Intelligent Forms	CPC-2017-00481	On the Creating Engagement form, two invoice formats are not available: Tax on sum - French general, Tax on sum - General.
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.

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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) will result 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 dropdown 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 the PPW.
Project Planning Worksheet (PPW)	CPC-2017-00484	In a task view, the length of the bars in the gantt are incorrect when no resource is assigned to the task.
Project Planning Worksheet (PPW)	CPC-2017-00485	Errors or unexpected results may occur when changing the loading method on a task assignment view, for example from 3 to 0.
Project Planning Worksheet (PPW)	CPC-2017-00486	Dates for successor tasks that have assignments will not be shifted if they are filtered from the view. Ensure no filters are applied if the project has dependencies to allow the dates to be shifted correctly.
Project Planning Worksheet (PPW)	CPC-2017-00487	The PPW does not support inter-project dependencies. The project worksheet or task dialogue can be used to ensure the dates are shifted in the successor projects and tasks.
Project Planning Worksheet (PPW)	CPC-2017-00488	Completing a task assignment by changing the percent complete or remaining hours in a task assignment view will not complete the task or its summary/child tasks. Use the task view to complete the task if only one assignment exists or if all assignments are complete.
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 exporting data to Excel from the project worksheet, the predecessor/successor task fields are converted to date format when using a German locale and browser language.
Report Designer Data providers	CPC-2014-07798	The financial analysis summary calculations do not include completed projects or sub-projects 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'.

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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.
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 will exclude time records associated to deleted workgroups. If the time is desired on reports, refrain from deleting workgroups and re-name them 'do not use' instead. The new unsecured Cognos model (released in V2014 SP2 and V2017) will include time records associated to deleted workgroups and can be used as an alternative.
Reports	CPC-2013-01573	When a scheduled report's locally scheduled time is not the same as UTC it is possible that the next run date will be calculated incorrectly if the offset between the local timezone and UTC is greater than the time difference between the last rundate and midnight.
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.

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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	The quick search and leads tree-view are inconsistent in access checking. 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.
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.
Time Entry	CPE-2012-02526	Users can create time entries for requests on dates that are in a closed period.