



Product	Changepoint
Version	2017
Release Date	April 2017
Release Type	Major release
Release Description	Key enhancements include: second phase of project planning worksheet (PPW), Intelligent Forms enhancements, other general enhancements and architecture improvements.

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Installation and upgrade instructions

For complete information on installing or upgrading to Changepoint 2017, see the *Changepoint Installation Guide*.

System Requirements

Software

For a complete list of the supported software configurations, see the Changepoint 2017 *Product Architecture and Technology Matrix* in the *2017 Release Notes and Patches* team folder.

Hardware

For a list of recommended hardware configurations, see the *Changepoint Hardware Recommendations Release 2017* in the *2017 Release Notes and Patches* team folder.

New and changed functionality

For a complete list of the new and changed functionality in Changepoint 2017, see the *Changepoint 2017 What's New* document in the *2017 Product Information Portal Access* team folder.

eLearning

The eLearning materials include new lessons in the following areas:

- Resource management
- Workflow
- Project planning worksheet (PPW)
- Intelligent Forms

Product retirement

The following items have been dropped from this release.

- Microsoft AppFabric has been replaced by Redis

Minimum browser and server software versions

The minimum software versions for browsers and servers are:

- Internet Explorer 11
- Firefox ESR 45
- SQL Server 2014
- Windows 2012 for IIS or SQL servers

For a full list of supported platforms and operating systems, see the *Changepoint 2017 Product Architecture and Technology Matrix*.

Report Designer

In response to customer feedback, Report Designer will continue to be on limited support in the Changepoint 2017 release. No functional enhancements will be made and only critical defects will be addressed for Report Designer. We reserve the right to discontinue support for Report Designer if browser technologies change such that it becomes impossible to support without significant effort.

Changepoint 2017 will be the last major release that supports Report Designer. Customers are encouraged to begin transitioning to the IBM Cognos reporting functionality that was introduced in Changepoint 2012 SP1.

The strategic partnership with IBM was undertaken to deliver best-of-breed business intelligence capabilities seamlessly integrated within the Changepoint solution. It will enable customers to leverage world class, sophisticated business intelligence functionality to deliver rich and dynamic reporting content to their users.

Customers can take advantage of the Cognos accelerator report packages, which contain close to 200 reports covering a wide range of data and formats, free of charge.

Contact your Changepoint representative for more information about the Cognos reporting package and about the services packages that are available to assist customers in getting the best out of the Cognos solution.

ASP-based reports and portlets

The ASP-based reports and portlets will be on minimum support for Changepoint 2017, and will be sunset in future releases. No functional enhancements will be made, and only critical defects will be addressed. Customers are encouraged to leverage the Cognos reporting solution as an alternative. The Cognos accelerator package contains replacement reports for almost all of the existing ASP-based reports.

COM API

The COM API is supported in Changepoint 2017 but will be phased out in a future release. Customers should use the web services API or WCF API for new development, and make plans to transition existing customizations to the web services or WCF API.

Changepoint 2012

Support for defect fixes for Changepoint version 2012 (base, SP1, and SP2) will end 120 days after the release of Changepoint 2017.

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

Other

- Microsoft Dynamics will be certified at a later date.
- Changepoint Archiving will be certified at a later date.

Changepoint media

The Changepoint media contains the following:

- Core Changepoint installer, related files and tools

- Online help files in English only. The French and German online help will be released at a later date
- eLearning program (on separate media)

Release and product documentation

The release and product documentation is available in the *2017 Release Notes and Patches* team folder in Changepoint through the Client Portal, or from your Changepoint client services representative or client manager.

Note: Unless indicated otherwise, the release and product documentation is available in English only. The French and German documentation will be released at a later date.

Release documentation

The following release documentation is available in English only.

- *Release Notes*
- *Caveats and Known Issues Reference*
- *Changepoint Installation Guide*
- *Changepoint 2017 Product Architecture and Technology Matrix*
- *Changepoint Hardware Recommendations Release 2017*
- *eLearning Release Notes*

Technical reference and integration guides

The following guides are available in English only.

- *Changepoint API Installation Guide*
- *Changepoint API Reference*
- *Integration Framework Reference*
- *Microsoft Dynamics GP Toolkit Administration Guide* (to be released at a later date)
- *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* (English only)

- *Company and Contact Management User Guide (PSA only)*
- *Client and Contact Management User Guide (PPM only)*
- *Customer Relationship Management User Guide (PSA only)*
- *Engagement Management User Guide (PSA only)*
- *Initiative Management User Guide (PPM only)*
- *Financial Management User Guide*
- *Mobile Quick Reference Guide*
- *Performance Management User Guide*
- *Portfolio Management User Guide (PPM only)*
- *Project Management User Guide*
- *Report Designer 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-Cognos Data Model Reference*

Changes to the product documentation set

Survey Management User Guide is now part of the *Changepoint Administration Guide*. Similarly, the Survey Management help is part of the Changepoint Administration help.

Performance Metric Calculations Reference guide is available from the knowledge base in Changepoint and continues to be available in team folders from previous releases.

Upgrade considerations and notes

This section briefly describes the changes that are of particular importance to customers who are upgrading from a previous version of Changepoint.

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

Upgrade paths

You can upgrade to Changepoint 2017 from the following versions only:

- Changepoint 2014
- Changepoint 2014 Service Pack 1
- Changepoint 2014 Service Pack 2

Customers upgrading from Changepoint 2014 or Changepoint 2014 SP1 only

- Cognos components must be reinstalled.
- Draft tasks will be available in the Cognos data model and will affect existing reports. Users can add filters to exclude draft tasks from existing reports after the upgrade. Draft tasks appear on reports only if the user who runs the report has been explicitly granted view or edit access to the project.
- The new RESTful API is installed by default, and a RESTful API option is available in the Changepoint installer.
- For task dependencies, the “Lag time in working days” and “Successor task must start on working days” options have been removed. To simplify the dependency logic, working days always apply to the lag time and start date.
- New security feature, “Access Mobile Application,” allows users to access the Changepoint Mobile app
- We are unable to certify the Microsoft Edge browser due to some outstanding issues with third-party vendors. Currently there is no target date for certification.

Effort for task assignments is stored in daily amounts

The effort amounts for task assignments is stored in daily amounts. The daily effort distribution amounts are saved immediately when the task assignment is saved, which makes data retrieval and reporting much quicker. These changes affect the following areas:

- Custom data providers for task assignment resource demand – you must ensure that these data providers are selecting from the new tables. Only inserts are made when tasks are

saved. Existing non-current data is removed later by a scheduled job for performance reasons.

- Resource demand and financial analysis summary data providers and Cognos queries take advantage of the greater precision of the new daily allocation storage for task assignments. There may be differences after the upgrade in the report data.

Financial analysis summary calculations only consider demand that is distributed in the timeframe within the 'demand past years' and 'demand future years' configuration, which defaults to 5 years in the past and 5 years in the future. For performance reasons, task assignment demand is taken directly from the pre-saved daily allocations. If an assignment is for a very long period of time that spans longer than the configured timeframe, the financial analysis summary information will not contain the total amount of effort, cost or billing/charge amount. In previous releases, the demand was artificially grouped into the earliest or latest period available.

Redis replaces Microsoft AppFabric

Prior to Changepoint 2017, Changepoint used Microsoft AppFabric 1.1 as part of its caching strategy in order to reduce calls to the database and provide a faster response to the web server and its clients. Redis is an open source, in-memory data structure store, which can be used as a database, cache, and message broker.

Note: Redis is installed on the web server, which eliminates the need for a separate caching server.

Effort for task assignments is no longer redistributed automatically when a new nonworking day is added

Task assignment effort is no longer redistributed when a nonworking day is added to Changepoint. This applies effort that is manually and automatically distributed. The new Cognos 'resource demand all days' query subject can be used to generate reports that list effort on nonworking days so the affected project managers can take action.

Security Features

Changes to security features

The CPX Process Intelligence functionality is replaced by Intelligent Forms. The security features related to this functionality have been renamed as follows:

- "CPX Documents and Forms" security features category – renamed "Intelligent Forms"
- "Access CPX Document Generation" feature – renamed "Access Document "Generation", description: "Access the forms that generate documents"

- “Access CPX Document Administration” feature – renamed “Access Document Administration”, description: Access Infiniti Manage from Changepoint Administration.
- “CPX Forms Generation Access” feature – renamed “Access Forms Generation”, description: Access the forms that create and edit entities.
- “Access CPX Forms Administration” – renamed “Access Forms Administration”, description: Access Infiniti Manage from Changepoint Administration.