



## **Changepoint 2017 What's New**

April 2017

Product Management

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## Table of contents

Changepoint 2017 What's New .....	1
Introduction.....	3
Release Date .....	3
Changepoint 2017 - Overview .....	3
Project planning worksheet.....	3
Intelligent Forms Enhancements .....	6
Cognos Unsecured model .....	7
Cognos Resource demand reporting enhancements .....	7
Other General Enhancements.....	8
Immediate saving of daily effort distribution for task assignments.....	8
Effort distributions for task assignments are not affected if a non-working day is added	8
Ability to add effort to a non-working day in the PPW .....	9
eLearning .....	9
Product Retirement.....	9
Report Designer .....	9
ASP-based reports and portlets .....	10
Browser and Server minimums.....	11
AppFabric caching mechanism .....	11
Changepoint 2012.....	11

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## Introduction

We are very pleased to provide information about our next major release, Changepoint 2017.

This release introduces some significant enhancements in key functional areas, as well as some performance and scalability improvements.

## Release Date

The General Availability date for Changepoint 2017 is April 7, 2017.

All product documentation and software for this release will be available through the standard channels. Contact your project consultant, support or client management representative for assistance.

## Changepoint 2017 - Overview

Changepoint 2017 will include these areas of improved functionality:

- Project planning worksheet – phase 2
- Intelligent Forms enhancements
- Other general enhancements
- Architecture improvements

## Project planning worksheet

The next set of features is available for the project planning worksheet (PPW), first introduced in version 2014 SP2. Functionality that is important to our customers was added, including a significant amount of 'behind-the-scenes' enhancements to ensure the worksheet continues to be easy to use and performs well.

Users will be pleased with the high-performing, easy-to-use worksheet while organizations will appreciate the advanced functionality available, such as configurable fields and conditional values/properties. The combination of ease-of-use and critical functionality will drive greater adoption of the PPW, which is critical to ensuring that higher quality information is available in Changepoint to allow better reporting, visibility and the ability to react to anomalies quickly.

The first phase of the PPW introduced some key capabilities based on customer feedback. Several review sessions were done with a cross-section of customers and a preview site was made available to gather feedback from users that influenced the capabilities that were included in phase 2. Phase 1 capabilities included:

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- A brand-new user interface that has no downloads required. The functionality is .net based and does not use any add-ons.
- Single project lock: all tasks are locked automatically when launching the project planning worksheet. Locking of individual tasks is not required.
- Creation of tasks using a button or the 'Insert' key.
- Assigning tasks via a simple checkbox at the row level.
- Assigning one or multiple resources to multiple tasks at once (by percentage or effort).
- Linking tasks, including all dependency types, by filling out the 'Predecessor' field or by using the gantt.
  - Finish-to-start
  - Start-to-start
  - Finish-to-finish
  - Start-to-finish
- Copy and paste tasks.
- Indent / outdent tasks.
- Re-order tasks.
- Gantt functionality, which allows users to visualize the tasks in a timeline, zoom in and out, move or expand/shrink tasks and link tasks.

Version 2017 enhancements include:

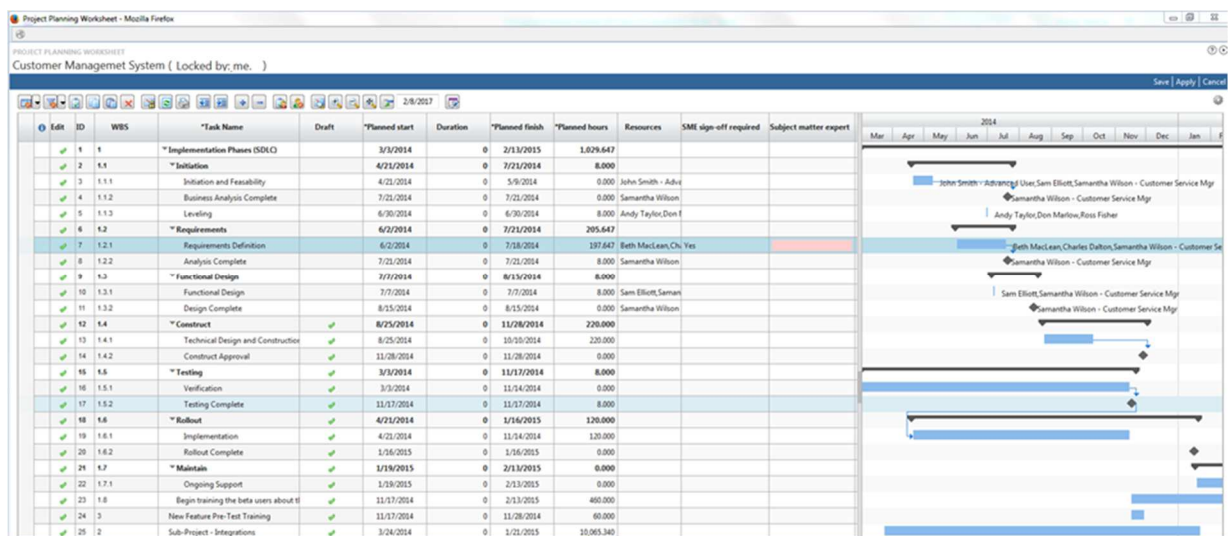
- Ability to create views and filters, allowing users and organizations to tailor the worksheet to suit their needs
- Ability to edit existing tasks, including all task information. Many organizations use project templates as a starting point, which will be possible in version 2017. Ongoing management of the project plan is also possible.

*The screen shot below is an example of a task view which includes both draft and active tasks.*

1. *All the tasks can be edited in the worksheet, and the draft tasks can be activated when the project manager is ready to do so.*
2. *Configurable fields can be added to the view. In the example below, the 'Subject matter expert' field has a conditional property that is respected and indicates to the user that it is now mandatory.*

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- Ability to edit task assignments, including all assignment information (e.g. start date, finish date, effort)
- Ability to change forecast start/finish and remaining effort/percent complete on task assignments.
- Ability to change the percent complete on task assignments that are marked as 'status not required', which allows project managers to mark those assignments as complete.
- Ability to populate configurable fields on tasks and assignments, including conditional values and properties for task fields.
- Ability to edit task assignment effort in daily or fiscal period distributions.
- Ability to add effort to a non-working day when using a manual effort distribution.
  - See 'Other General Enhancements' for more details.

The screen shot below is an example of a task assignment view, which includes configurable fields and additional columns that are important to this user. Notice several things:

1. Task assignment information can be modified and can be different from the task level.
2. Effort distribution can be shown in days (as below) or fiscal periods.
3. Effort is added to Feb 11, which is a Saturday.

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The screenshot displays the Project Planning Worksheet (PPW) interface. At the top, it shows the project name 'Customer Management System (Locked by me.)'. Below this is a Gantt chart area with various task bars. The main table below the Gantt chart lists project tasks with the following columns: WBS order, Task Name, Resource, Planned start, Planned finish, Planned hours, Billing role, Billing rate, SME sign off required, Subject matter expert, Loading method, and dates from 2/6/2017 to 2/12/2018.

WBS order	Task Name	Resource	Planned start	Planned finish	Planned hours	Billing role	Billing rate	SME sign off required	Subject matter expert	Loading method	2/6/2017	2/9/2017	2/16/2017	2/11/2017	2/12/2018
3	Initiation and Feasibility	John Smith - Advise	5/9/2014	5/9/2014	0.000	Developer - Tester	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
3	Initiation and Feasibility	Sam Elliott	4/21/2014	4/21/2014	0.000	Business Analyst -	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
3	Initiation and Feasibility	Samantha Wilson	4/21/2014	4/21/2014	0.000	Project Manager -	207,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
4	Business Analysis Complete	Samantha Wilson	7/21/2014	7/21/2014	0.000	Project Manager -	207,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
5	Leveling	Andy Taylor	6/30/2014	6/30/2014	0.000	Business Analyst -	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
5	Leveling	Don Marlow	6/30/2014	6/30/2014	8.000	Business Analyst -	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
5	Leveling	Ross Fisher	6/30/2014	6/30/2014	0.000	Business Analyst -	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
7	Requirements Definition	Beth MacLean	6/2/2014	7/18/2014	0.000	Business Analyst -	181,000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
7	Requirements Definition	Charles Dalton	6/2/2014	7/18/2014	187.647	Business Analyst -	181,000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
7	Requirements Definition	Samantha Wilson	6/2/2014	7/18/2014	0.000	Project Manager -	207,000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
8	Analysis Complete	Samantha Wilson	7/21/2014	7/21/2014	8.000	Project Manager -	207,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
10	Functional Design	Sam Elliott	7/7/2014	7/7/2014	8.000	Business Analyst -	181,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
10	Functional Design	Samantha Wilson	1/30/2017	2/11/2017	16.000	Project Manager -	207,000	Optional	Allison Miller	3 - Manually distribute - No update	0.000	0.000	0.000	0.000	8.000
11	Design Complete	Samantha Wilson	8/15/2014	8/15/2014	0.000	Project Manager -	207,000			3 - Manually distribute - No update	0.000	0.000	0.000	0.000	0.000
13	Technical Design and Construction	Derman Watson	8/25/2014	10/10/2014	240.000	Developer - Junior	92,000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
13	Technical Design and Construction	Jack Carson	8/25/2014	9/12/2014	120.000	Developer - Junior	92,000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
13	Technical Design and Construction	Solution Architect	8/25/2014	10/10/2014	80.000		0.000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000
13	Technical Design and Construction	Sr. Analyst	8/25/2014	10/10/2014	60.000		0.000			4 - Auto-distribute - No update to pac	0.000	0.000	0.000	0.000	0.000

- Support for project managers, project editors and summary task managers
  - To simplify the worksheet and respond to customer preferences, the entire project plan will be locked when a user launches the PPW. Only one user can edit the project plan at a time.
  - For summary task managers, although the entire project is locked, the users will only have view/edit access to their portion of the project plan.
- A 'Zoom to fit' option in the gantt
- Ability to select a default dependency type
- Ability to assign tasks to personal groups
- Export to Excel
- The eLearning lessons will be updated to include the new functionality, allowing users to start using the worksheet very quickly.

## Intelligent Forms Enhancements

Changepoint Intelligent Forms capabilities, first released in a version 2014 SP2 feature pack, enable organizations to increase operational efficiency by simplifying complex business processes, and enabling interactive and intelligent guided experiences.

Changepoint continues to uphold its commitment to provide its customers with the most intuitive and user-friendly PSA/PPM solution on the market today.

The Intelligent Forms capability includes the following enhancements as part of the Changepoint 2017 release:

- Theme harmony – the look and feel of the standard forms is updated to match the Changepoint user interface theme. This includes the form design attributes such as the font size, font color, and font type.

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- Multi-lingual translation – the user interfaces of the standard forms are translated into the Changepoint supported languages, which includes English, French, German, Dutch, Spanish, Italian, and Brazilian Portuguese.
- Fixed reported errors – the stability of the standard forms has been improved.
- Intelledox Infiniti version update – the core Intelledox application has been updated to the latest GA release (v9.6.19). This introduces a new Web designer application which is accessible from the Infiniti Manage application. It also comes with improvements in performance and stability of the Infiniti design application. For additional details on this release, please visit the following site: <http://ixsupport.intelledox.com/kb/root.aspx>

## Cognos Unsecured model

A new unsecured version of the Changepoint package is available. First introduced in a version 2014 SP2 general patch, the unsecured package is useful to provide reporting access to users who may not have access to all the data, for example casual users, finance personnel or executives. Installation of the unsecured package is optional.

Benefits of the unsecured package:

- Ability to provide reports that include all data regardless of the user's Changepoint access
- Ability to determine which users can create reports and run reports from the un-secured package
- Quicker report execution, since the access checks are not performed

**Note:** Comparisons between the execution times of the secured and un-secured packages may be misleading, since the un-secured package may return much more data. If doing comparisons, ensure the same amount of data is being returned by both reports. The improvement will be more noticeable on reports that select from tables with large volumes of data and more complex access checks (for example task assignment and request), and reports which contain many configurable fields.

## Cognos Resource demand reporting enhancements

To allow customers more flexibility and the ability to create 'calendar-like' reports, a new 'Resource demand all days' query subject was added. It will show a daily record for every demand item and every day, including days where there is no demand and including non-working days. Here is a comparison between 'resource demand' and 'resource demand all days':

This report is run for 2/17 to 2/25 for one demand item. The 'resource demand all days' report shows every day, and can be formatted to show which days are non-working days (in this example there is a calendar non-working day for a Friday).

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### Resource demand

		2017-02-22
Changepoint Resource	Resource demand reporting	4

### Resource demand all days

		2017-02-17	2017-02-18	2017-02-19	2017-02-20	2017-02-21	2017-02-22	2017-02-23	2017-02-24	2017-02-25
Changepoint Resource	Resource demand reporting						4			

The information is similar to 'resource demand', and includes past demand data for records that have a finish date greater than today's date minus 365 days. It also includes more task assignment information: all task assignments where the project status / hard-soft-booked combination is included as resource demand. Additional fields 'completed', 'planned finish', 'locked' and 'include in resource demand' allow more granular filtering of task assignment demand.

For example, an organization may be interested in reporting on all demand for the last year. Or, only demand for active tasks is required on the report.

The 'resource demand' query subject was extended to include past demand data for records that have a finish date greater than today's date minus 365 days. It includes only task assignments where 'include in resource demand' is selected and the assignment is not marked as completed.

## Other General Enhancements

### Immediate saving of daily effort distribution for task assignments

To support faster retrieval of demand data in the PPW and other places such as reporting, a daily effort distribution is saved any time a task assignment is created or updated (whether a manual distribution is done or not). The effort is stored with 5 decimals of precision, to avoid rounding issues. However, if a very small effort is entered over a very large time period, rounding issues still may occur. When viewing data in the PPW, the effort is shown in 3 decimals. When you click in a cell to edit you will see the full 5 decimals.

### Effort distributions for task assignments are not affected if a non-working day is added

In order to avoid re-processing large amounts of data as well as respond to customer requests, the effort distribution of task assignments will not be updated if a non-working day is added to the system (by any means, i.e. in system admin, calendar or user setup). The effort will remain on the non-working day until action is taken by a user to remove it; this includes effort that was manually or automatically distributed. Users will receive the 'Project impacted by a non-working

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day change' email, and effort allocated to non-working days can be reported on, to allow the affected users to take action.

## Ability to add effort to a non-working day in the PPW

When doing manual daily effort distributions in the PPW, effort can be added to non-working days. Users have asked for the ability to do so, since sometimes resources will be scheduled to work on non-working days (e.g. on a weekend).

If a non-working day is created on a date where effort is already allocated, the effort will not be removed and no automatic re-distribution of effort will occur.

**Note:** Effort cannot be added to non-working days in the old project worksheet or resource management worksheet and will not be visible in the old project worksheet; only the PPW supports ability to add effort to a non-working day. If an assignment that has effort on non-working days is edited in the old project worksheet or RMW, the effort will be removed from the non-working day when the project or demand item is saved.

There will be an ability to report on effort that is currently allocated to non-working days.

## eLearning

New lessons were added in the areas of workflow, resource management and intelligent forms.

The resource management lessons outline best practices and approaches for resource management and take the user through examples of each setup. They will be very valuable for organizations that are starting on their journey to improve their resource management practices.

The new workflow lessons take the administrator through detailed examples of setting up workflow processes and steps, allowing a greater understanding of the functionality and flexibility available to support an organization's requirements.

The Intelligent Forms lessons introduce the users to interface simplicity pertaining to the standard form templates shipped with the release. These lessons provide guidance on how to access and use the standard forms.

## Product Retirement

### 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

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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 version 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 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 version 2017, and will be sunset in future releases. No functional enhancements will be made and only critical defects will be addressed for the asp-based reports and portlets. Customers are encouraged to leverage the Cognos reporting solution as an alternative.

Most of the asp-based reports already have a Cognos equivalent, available in the 2014 SP1/SP2 streams as part of the new accelerator reports package, and available in lower versions with the assistance of Changepoint Services. Contact your Changepoint representative for a listing of the Cognos equivalents for the asp reports.

Benefits of Cognos versions:

- Easily modified (add/remove columns or calculations)
- Multiple formats, better suited to exporting or printing (e.g. Excel or PDF)
- More flexible filter selections
- Reports can be scheduled to print or email
- Available in all supported browsers

**Note:** Reports that contain functionality (for example the 'batch time approval' and 'contractor reconciliation' reports) will continue to be supported in some fashion. They may be re-architected in future releases to support more than the Internet Explorer browser.

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## Browser and Server minimums

The minimum requirement for Internet Explorer will be Internet Explorer 11. This minimum is consistent with Microsoft's new support policy, which is much more aggressive in terms of supported versions.

The minimum requirement for Firefox will be ESR 45.

The minimum requirement for SQL Server will be SQL 2014.

The minimum requirement for Windows Server will be Windows 2012.

A full architecture and technology matrix will be available with the GA product and will specify a full listing of all the supported browser versions and platforms.

## AppFabric caching mechanism

Prior to CP2017, Changepoint utilized 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. On April 2, 2016, Microsoft announced that it will be ending support for AppFabric 1.1. Because of the pending termination of AppFabric 1.1 support, Changepoint 2017 will be replacing AppFabric 1.1 with Redis.

Redis is an open source, in-memory data structure store, used as a database, cache and message broker. Benefits to customers:

- **Ease of deployment:** Redis is installed on the web server, eliminating the need for a separate application caching server. It is installed automatically as part of the Changepoint web site installation process. It can also be manually configured quickly and easily for more complex deployments such as web farms and fail-overs.
- **Highly scalable and efficient:** Redis is one of the most popular caching services in the world, and Changepoint customers will benefit from the reliability, scalability and high performance of Redis.

## Changepoint 2012

Support for defect fixes on Changepoint version 2012 (Base, SP1 and SP2) will end 120 days after the release of Changepoint 2017. Customers will continue to be supported, but fixes to the solution will be considered for the two most current releases only. General support questions and assistance is still available on all versions of the software to all customers who have maintenance agreements.

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