

TO INCREASE 

Release Notes for Business Integration Solutions 10.0.30.48 for Microsoft Dynamics 365 Finance and Operations

Release Notes

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Document information

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1 Business Integration Solutions

1.1 General

1.1.1 Purpose

This document describes the new releases of To-Increase Business Integration Solutions for Microsoft Dynamics 365 for Operations. Please read this document carefully before installing it. If you are interested in the practical how-to information, we provide on the To-Increase blog, you can follow the links we provide in some sections of the document. You find our blog at www.to-increase.com/blog/.

1.1.2 Audience

The document audiences are consultants and customer end-users.

1.1.3 Installation Notes

To install 'Business Integration Solutions' you need a valid license key. The following licenses are available:

- Business Integration Solutions
- Connectivity
- EDI
- MDM Master data management

1.1.4 Software Requirements

Business Integration Solutions components are released on the following kernel build. This means that this version installs on Update 10.0.19 and higher.

Version	Kernel build	Application version
Microsoft Dynamics 365 for Operations – Update 49	10.0.25.0	7.0.6316.36

1.1.5 Documentation

Help documentation for Business Integration Solutions is available at [Connectivity studio \(to-increase.com\)](http://Connectivity studio (to-increase.com)).

1.1.6 Support

In case of any question or query, please reach out to your Microsoft Partner or To-Increase directly. You can contact To-Increase via our support portal (<https://support.to-increase.com/ticsm>), or send an email to customeroperations@to-increase.com

1.1.7 Labels

This release is shipped with U.S. English labels. Please contact your Microsoft Dynamics Partner for labels in other languages.

1.2 Build changes

No changes.

1.3 Fixes/Changes

- CS00222193 | 3PL integration completing picking list registration. For each existing handler, a new one was created to cancel not picked lines:
 - BisDocumentPickingListRegistrationCancelUnpicked
 - BisDocumentPickingListRegistrationPostAllCancelUnpicked
 - BisDocumentPickingListRegistrationPostPackingSlipCancelUnpicked
- CS00222792 | Azure Service Bug issue with BIS version control. A possibility to import/export Service Bus definitions was added.
- CS00222597 | EDI orders and CTP check. If the delivery date control type is CTP, a similar standard calculation of the shipping date and receipt date is applied.
- CS00223192 | New case from closed case # CS00222797. Support for number sequences with less than 5 alphanumeric characters was added.
- CS00223289 | product enhancement: migrate issue shared tables. Store and retrieve the external application based on the table parameter. If a table is shared and a new option 'Store shared external' is enabled on the application, it will use the record in the 'dat' company. Otherwise, in the current company.
- CS00223303 | The product dimension version is missing on the form EDI Sales order. A new Version dimension field was added to sales, purchase and Delfor EDI journals.
- CS00222741 | Reprocess of record with another target company. The reprocessing of the failed message from the history will be executed for the target company from the history.
- CS00223315 | Staging error is not shown. The EDI configuration key was removed from the related menu items. Security was added to the BIS message user and message designer.

Internal

- Design Connector: Source/ Target Companies are not working as expected. Restore the code to use the target companies from the connector setup.
- MDM message creation - Field recording is throwing an error when LogisticsContactInfoGrid fields are selected. The forUpdate clause was missed while updating the document record.
- MDM message creation is showing an issue with type icon in "LogisticElectronicAddress". A warning that display/edit methods are not supported in the field picker was added.
- Changing combine with parent leaves out part of returned dataset without warning. A validation if all combined child records should be at the bottom of the list and not at the top was extended for F&O document types too.

1.4 Functionality New and Changed

1.4.1 BIS DQS integration

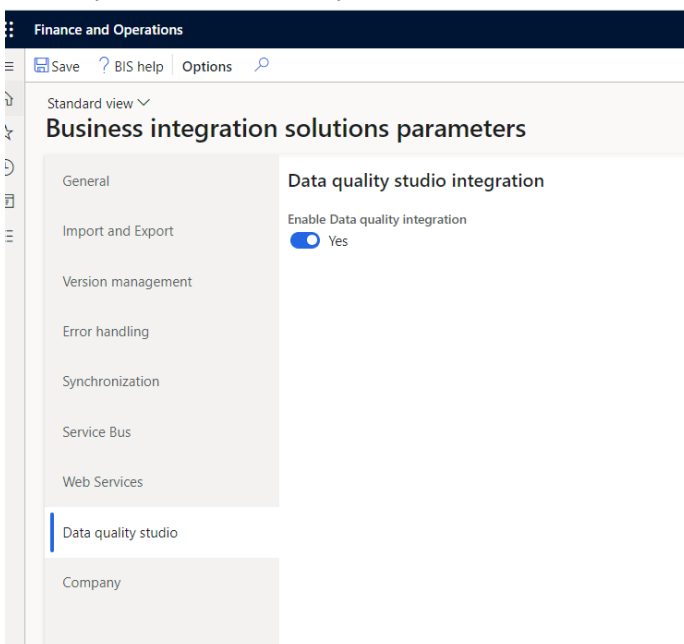
Important: The DQS part of the integration should be released in January 2023. DQS release is required for the integration because the functionality is not backward compatible.

The integration between BIS and DQS is added. In the past, a separate model to handle the integration between the two products was created but that meant the customer needs to install DQS, BIS and the integration model.

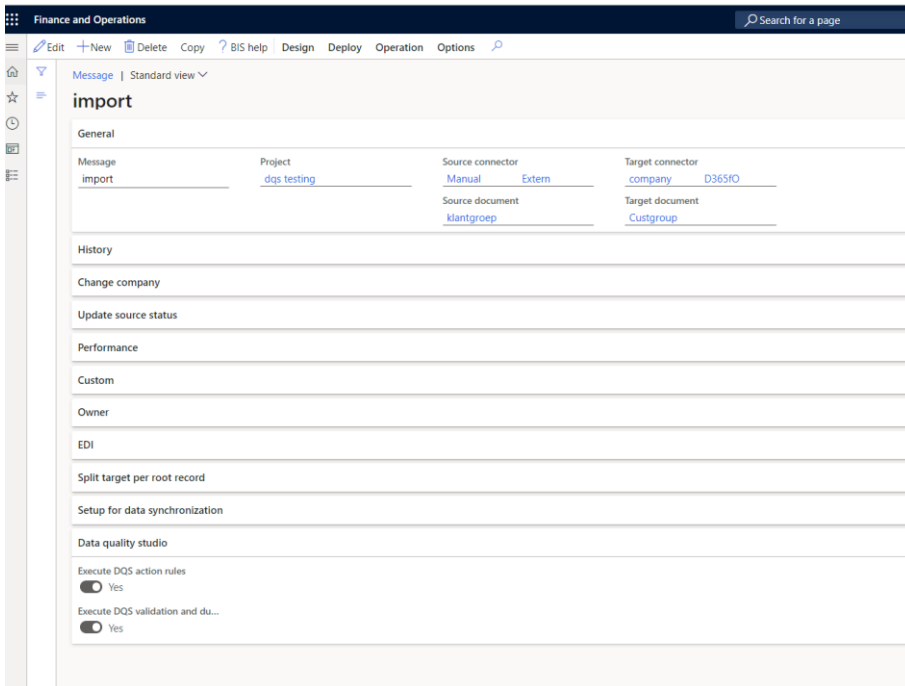
To avoid that and the product being within the To-Increase it was decided to create the integration between BIS and DQS Inside the BIS product itself. This meant the integration had to use reflection to be able to install BIS with or without DQS.

1.4.1.1 *Setup*

In the parameters an additional tab is introduced to enable the integration between BIS and DQS. This tab will only be visible if DQS is present and enabled.



If this setting is set to yes, DQS rules can be used in the message. In the message form an additional tab will be shown in the message header.



Currently, DQS supports two options for which data quality roles can be executed. The actual setup of the roles is done inside DQS and is implemented by BIS as they are.

Use DQS help to see what both settings actual can do.

Once the setup is done the message will implement the data quality rules will be executed if

- The DQS in the bis parameter is set to Yes
- Target document is AX document
- IF at least one of the DQS options is enabled

The rules are implemented for the following situation:

- Record - In the initValue and the ValidateWrite
- Field – the ValidateWrite and the ModifiedField

The integration between BIS and DQS is only implemented for the Find Actions

- Update
- Update or Insert
- Insert
- Insert or fail
- Replace. The delete will not implement DQS the insert will implement DQS again

All others like delete, find, etc. will not implement DQS.

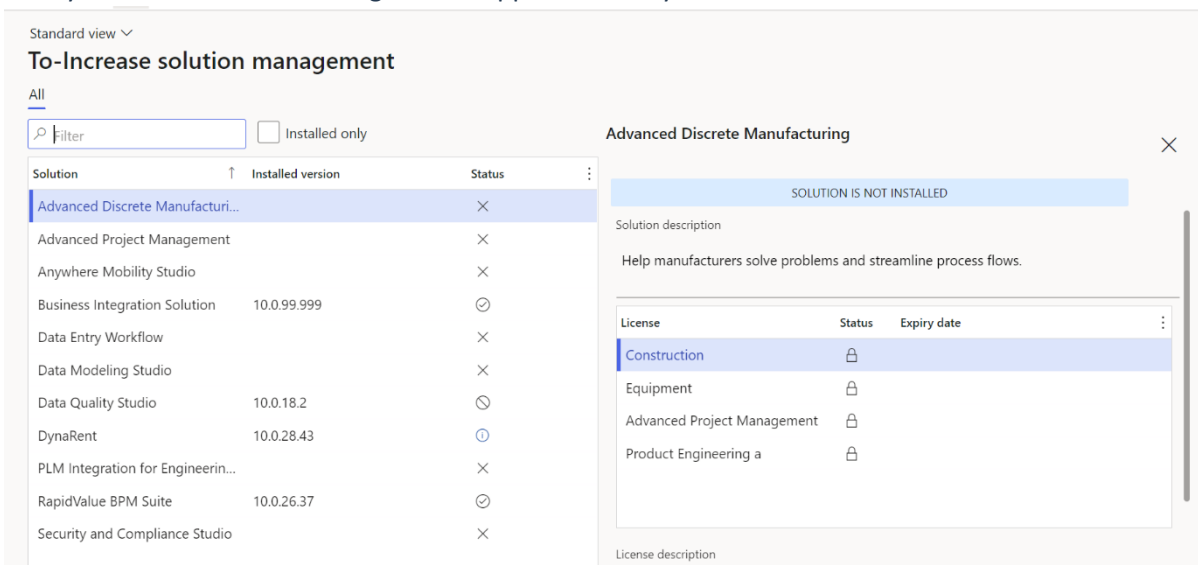
1.4.2 Common features

To-Increase is offering various different add-on solutions. Some features and technical solutions are common or could be common for all of our solutions on the Dynamics 365 Finance and Operations platform. As of November 2022, we will start leveraging a new common library model.

The common library model will be a centralized location where the new common features will be added automatically and customers don't have to make an additional effort to update the build pipelines after the first enablement of this model.

ISV licensing is technically supported with a code signing certificate. The certificate we have to use is expiring every three years, next up for renewal in 2023. In the near future, our solutions will refer to this common model for the code signing certificate, instead of maintaining it separately in all our solutions.

Next to technical content, the common library comes with features which are beneficial to our customers. E.g. a Solutions Management dashboard gives a clear view of currently installed versions, status of license, option to renew licenses without any downtime, easy access to release notes and documentation, and the ability to leave feedback through the in-app feedback system.



The screenshot displays the 'To-Increase solution management' interface. On the left, there is a list of solutions with columns for 'Solution', 'Installed version', and 'Status'. The 'Advanced Discrete Manufacturing' solution is highlighted. On the right, a modal window titled 'Advanced Discrete Manufacturing' is open, showing a 'SOLUTION IS NOT INSTALLED' message and a table of licenses.

Solution	Installed version	Status
Advanced Discrete Manufacturi...		×
Advanced Project Management		×
Anywhere Mobility Studio		×
Business Integration Solution	10.0.99.999	☑
Data Entry Workflow		×
Data Modeling Studio		×
Data Quality Studio	10.0.18.2	☑
DynaRent	10.0.28.43	ⓘ
PLM Integration for Engineerin...		×
RapidValue BPM Suite	10.0.26.37	☑
Security and Compliance Studio		×

License	Status	Expiry date
Construction	🔒	
Equipment	🔒	
Advanced Project Management	🔒	
Product Engineering a	🔒	

On all To-Increase forms, there is on the left-top of the forms a smiley icon in the menu where you can provide us feedback, suggestions and ideas so we can learn how improve our solutions.



To-Increase would love your feedback!

Please rate your experience in using the All solutions screen.

- 5 - Excellent
- 4
- 3
- 2
- 1 - Poor

Please tell us why you chose the rating. Additional insights would help us improve our products further.

Thank you for providing us feedback!

Your privacy is important to us. To protect your privacy, please don't include any personal information.

The Telemetry (TAI) is included into Common library (TCL). We are not going to deliver the TAI separately anymore.

1.5 Known issues

1.5.1 An issue with the form mapping recorder

When starting the recorder for the form mapping a fatal error can occur. This mainly happens if the message is opened via the workspace of BIS. If the message is opened via the BIS menu the error does not occur.

1.5.2 D365 new grid functionality affects navigation between our forms

Remark: **The AS2 Option in the webservice setup is obsolete. Use the new AS2 app to send and retrieve the data to TIE kinetics. Contact To-Increase to retrieve the app installer and manual**

Microsoft has introduced a new grid control, currently in public preview (feature management), and will be made generally available in future releases. We are currently testing new control and found a few issues which are reported to Microsoft. Once the feature is enabled at the customer end and in case of any issues kindly report to Microsoft. If the issue is related to To-Increase solutions kindly report it to us as well.

1.5.3 AS2 not able to send UTF8 format

This option will be replaced by the new App service which can send and receive data.

Due to a mismatch with third party DLL, which are also added by Microsoft, the sending of encrypted data is done in Unicode and not in UTF8 format. To send the correct encoding a newer version is needed.

1.5.4 Delivered models

The solution has three models. All three models need to be installed. The models are

1. Business Integration Labels. Contains only the labels of BIS and MDM
2. Business Integration. Contains the logic for Connectivity and EDI
3. Business Integration MDM. Contains the logic for Master Data Management.

The solution contains the deployable package and the code of three models. The code of the model 'Business Integration Licenses' is not delivered. If for some reason BIS code is needed, the best practice is

1. Install the Deployable package.
2. Install the Code of the three models.

1.5.5 Feature management

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public previews and will be made generally available in future releases, in other cases, they are already generally available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled in the customer

environment and any issues or questions related to new standard features and our solutions emerge, kindly contact us via To-Increase support.

1.5.6 TLS 1.2 is required for the web service

Since august MS is deprecating the use of TLS 1.1. Our BIS product will not be affected by this change. However, the Inbound App service does have an issue with this. Therefore, the new version is required to be installed.

If you are using an inbound application provided by To-Increase, please reach out to our support to get a new version based on your setup.

2 Dynamic Field Security Management

2.1 Introduction

2.1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Dynamic Field Security Management (DFSM) 10.0.30.3 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.25 and higher.

2.1.2 Audience

This document is intended for new users of Dynamic Field Security Management partners and customers. Some knowledge of Dynamics 365 for Finance and Operations is assumed.

2.1.3 Deliverables

Deliverable	Description
Solution package	Dynamic Field Security Management is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Dynamic Field Security Management 10.0.30.3
Release notes	This document is provided with the Dynamic Field Security Management product deliverables.
Implementation methodology	The solution package contains a <i>Dynamic Field Security Management implementation methodology</i> that provides detailed step-by-step instructions on how to install, learn, and implement the solution.
Getting started BPM library	The solution package includes a <i>Getting started with Dynamic Field Security Management</i> BPM library. This library contains several task guides that showcase some of the key capabilities of Data Entry Workflow.
Documentation BPM library	We are working on the documentation for <i>Dynamic Field Security Management</i> . This is not published as BPM library on the moment of this release.

Authentication assets

A To-Increase security certificate is provided to allow trusted installation of the provided model files and ISV license files.

2.2 What's New

A common request from prospects related to both data governance and master data management is the ability to control which fields are allowed to be changed depending on the user, a lifecycle state or other conditions of the record and also per company.

Due to variations per lifecycle status or other conditions, it is not possible to cover the requirement via the standard security framework; also, not within our Security and Compliance Studio (SCS) solution.

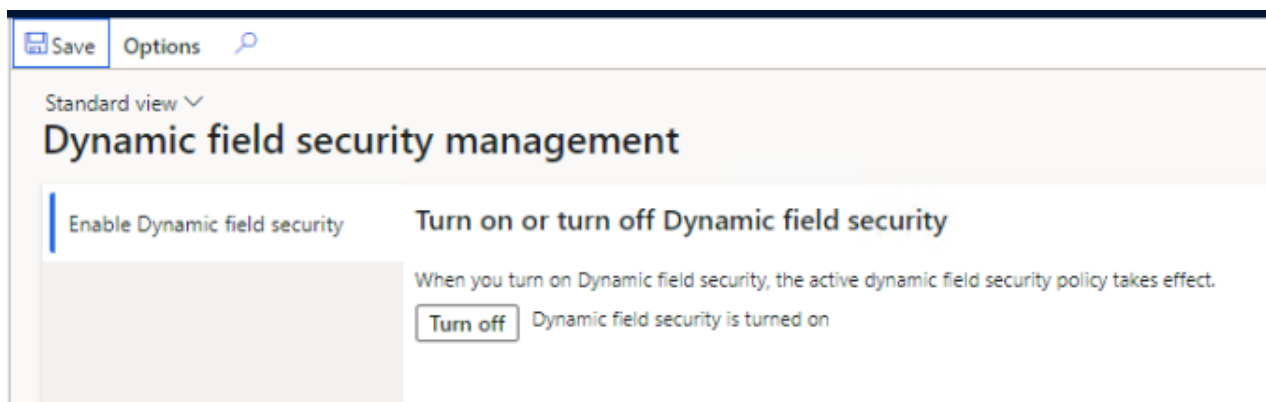
A use case for Master Data Management (MDM) is that a person would be allowed to enter values in the master company and for the same entity not in the local companies or vice versa. There are governance requirements in several industries where it is not allowed to just change an address of a vendor.

2.2.1 Current release

Note: We released the Dynamic Field Security Management (DFSM) solution as a preview. This implies that you can use it in non-production environments and try the solution. If you decide to install it on a production environment, keep in mind that we will not prioritize defects reported at this moment.

2.2.1.1 Design

User could turn on/off the Dynamic field security management from the parameters. It is possible only if the MDM license is installed.



The main form for the DFSM configuration is All field security policy.

General

Policy	Description	Version number	Description	Active
CustGroupDemo	Demo	1	First version	Yes

Table setup

Table name	Form name	Description	Security level	Default action	Skip
CustGroup	CustGroup		Record field	Allow edit	

Field setup

Field name	Control name	Dimension name	Default action	Skip
			Lock edit	✓
Name			Allow edit	

Condition setup

Description	Query type	Query base table	Custom query	Skip
table	Inquiry	CustGroup		

On this form user can specify which fields from which table should be blocked or hide based on the condition.

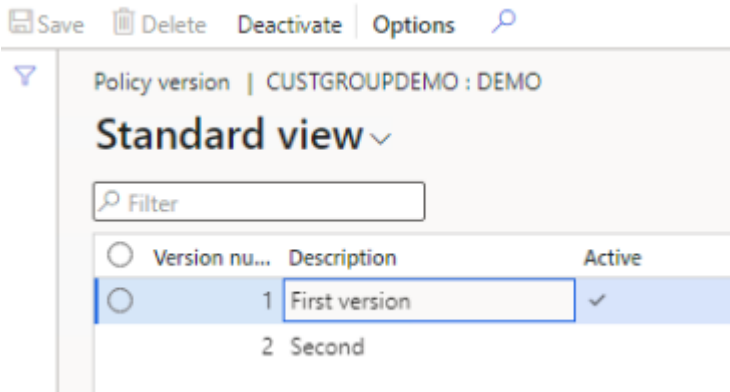
If field Form name is empty, the policy would be applied to all forms which use the table.

If Field name is empty, the policy would be applied to all fields of the selected table.

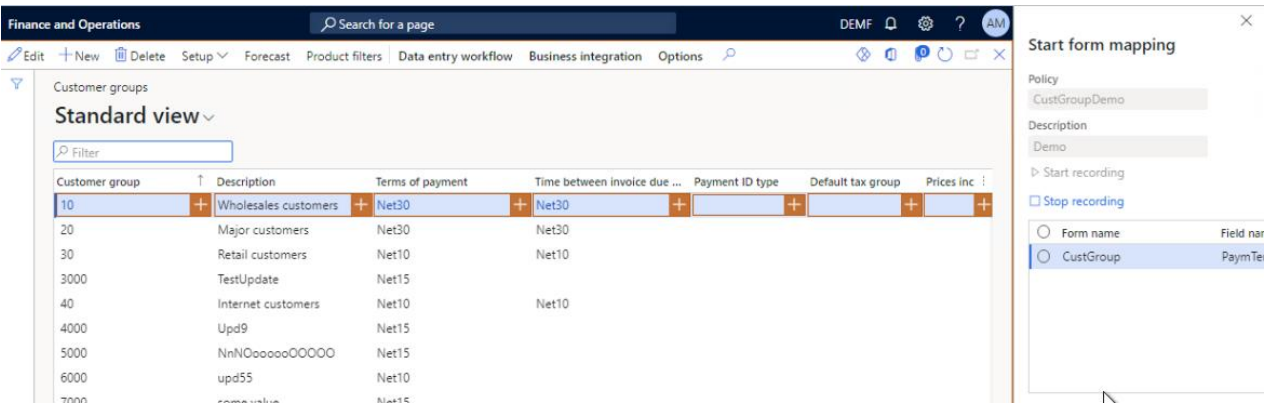
Two types of the conditions are supported:

- Inquiry (System query)
- Dynamic query (Dynamic query framework)

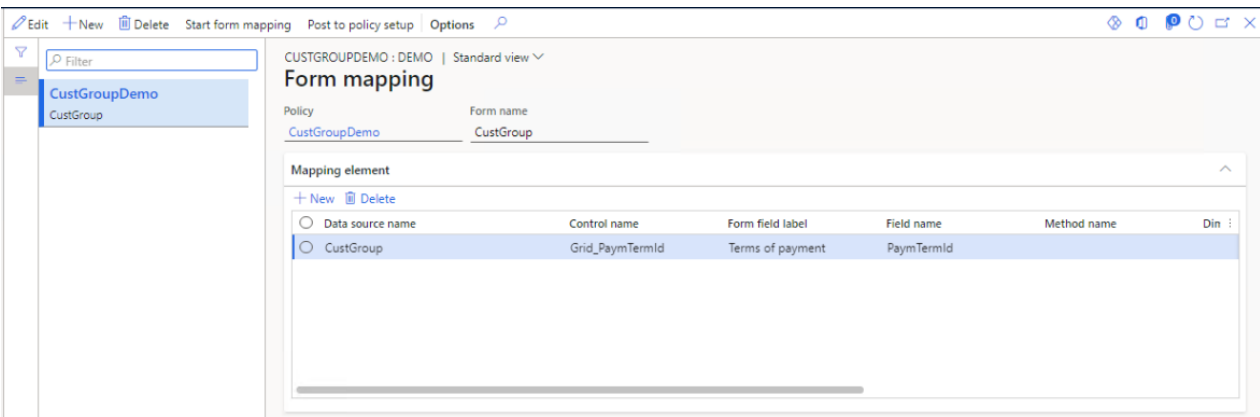
Field security policy supports versioning. Only active version will be executed. Active version could not be editable.



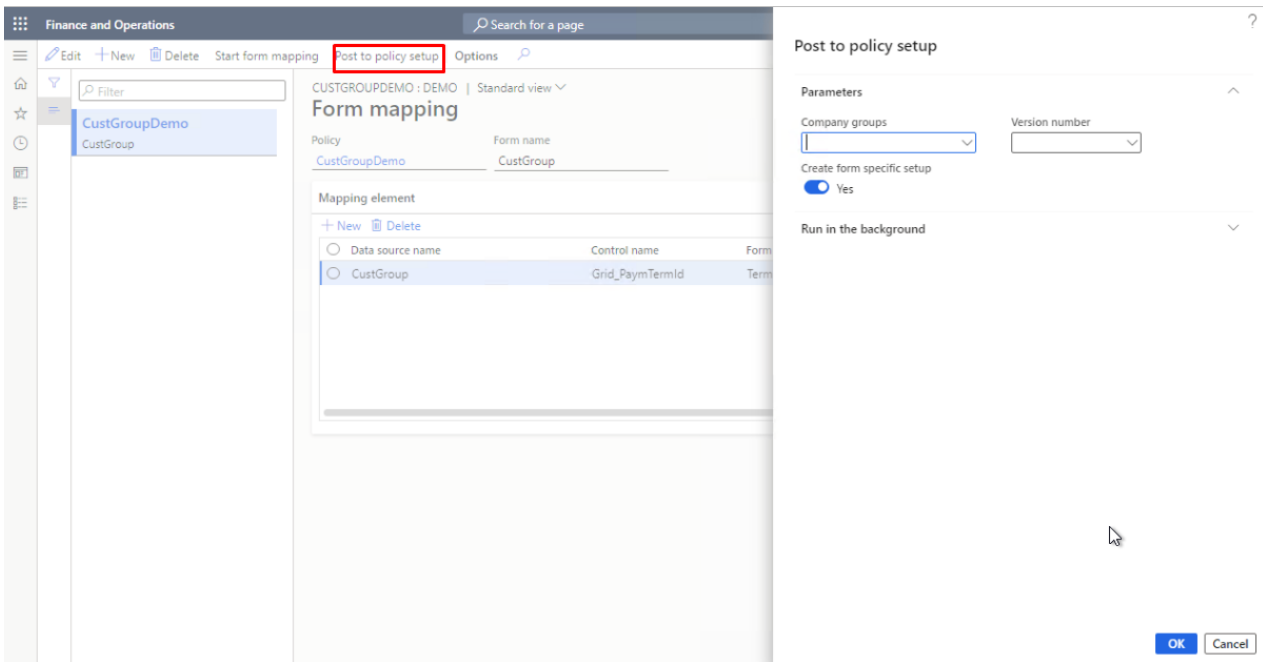
To make the selection of the fields easier, the Form mapping was introduced. The goal is to record the selected field and post them to the policy.



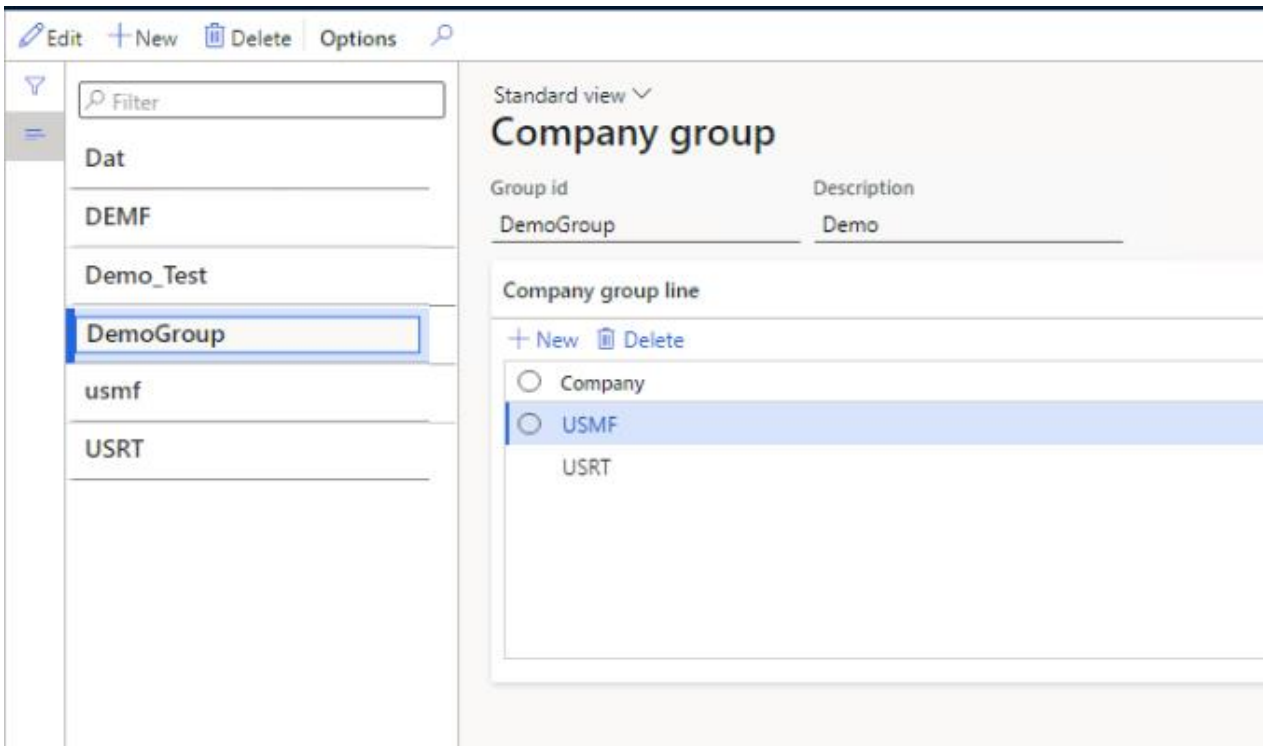
After recording is completed, user could review the selected fields in the Form mapping form.



After the review, user can post it to the Field policy setup.



To link the policy table only to specific companies, the Company group form was introduced.



2.2.1.2 Execution

The policy will be applied to the form if:

1. Policy is active
2. Policy contains table setup with the related Table name and Form name or only Table name if Form name is empty.

Only one policy could be applied at a time.

The policy will be executed based on the specified security level:

- Table – executes conditions on the initialization of the form. Block all table.
- Table field – executes conditions on the initialization of the form. Block specified fields.
- Record – executes conditions on the record selection (activation). Block all table.
- Record field – executes conditions on the record selection (activation). Block specified fields.

When you select one of the field levels, the setup on the table will be converted to all fields which are not in the field list. You can e.g. lock a table; except a few fields or have a table enabled and lock individual fields.

2.3 Bug Fixes

- CS00223451 | MenuItem could not be opened. The code was fixed to get rid of 'Object reference not found' error.

Internal

- Labels changes.
- Fix for the form mapping dialog to show all fields from all forms.
- Fix for the policy form to create a new version from the grid.

2.4 Known Issues and limitations

In this section the known issues and limitations that are currently in DFSM will be highlighted. These issues or limitations can also be due to standard Dynamics 365 limitations.

We have items on the roadmap that will improve the product. If you want to learn about upcoming features, you can contact To-Increase.

Note: We released the Dynamic Field Security Management (DFSM) solution as a preview. This implies that you can use it in non-production environments and try the solution. If you decide to install it on a production environment, keep in mind that we will not prioritize defects reported at this moment.

In general, our intention is that the Dynamic Field Security Management can work for any regular table and field, regardless if it is part of the standard, an ISV solution, customization or configured custom field. If there is any specific behaviour which needs attention to get the recording or processing better for your scenarios, please contact us so we can improve the solution or provide warnings in case standard behaviour cannot be overridden. See paragraph 2.4.1 for more detailed known limitations.

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via To-Increase support.

2.4.1 Control is enabled after the record activation on some forms

If form has code which manage the controls state and could enable it after the initialization of the form, the Table or Table field security level should not be used because. Switch to the Record or Record field security to execute the policy at record activation. We are adding this kind of forms to the list to warn user about wrong setup.

If form has code which manage the controls state and could enable it after the activation of the record, Dynamic field security could not block this control because policy was executed before.