
PLM Integration for Engineering Change Management 10.0.31.3 for Microsoft Dynamics 365 for
Finance and Operations (10.0.31)

Release Notes

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Document Information

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1. General

1.1 Purpose

This document describes the contents of PLM Integration for Engineering Change Management 10.0.31.3 for Microsoft Dynamics 365 for Finance and Operations (10.0.31). Purpose of this release is:

Topic	Yes/ No	Remarks
Upgrade to new Microsoft release	No	
New features	Yes	See chapter 2.1
New D365 functional topics considerations	No	
Bug fixes	No	
Discontinued features	No	
Known issues	Yes	See chapter 4

Cross reference to LCS solution:

Solution	Solution Version	Remarks
PLM Integration for ECM 10.0	15	Initial release of PLM Integration for Engineering Change Management for D365 FO 10

1.2 Audience

The audience for this document is certified partners selling and implementing as well as customers who have bought the solution.

1.3 Content list

PLM Integration for Engineering Change Management 10.0.31.3 for Microsoft Dynamics 365 for Finance and Operations (10.0.31) is released on the following Microsoft Dynamics for Finance and Operations, Enterprise edition build:

Installed Product Version	Installed Platform Version	Installed application version	Remarks
Microsoft Dynamics 365 for Finance and Operations (10)	Platform updates for 10.0.31	N.a.	

Note: This release is binary backward compatible from 10.0.29 GA

The PLM Integration for Engineering Change Management 10.0.31.3 for Microsoft Dynamics 365 for Finance and Operations (10.0.31) package consists of a deployable package.

Solution	Model name	Version
PLM	Product Lifecycle Management Labels	10.0.31.3
PLM	Product Lifecycle Management Licenses	2023.0.0.0
PLM	Product Lifecycle Management	10.0.31.3
PLM	Product Lifecycle Management BIS	10.0.31.3
PLM	Product Lifecycle Management Data Upgrade	10.0.31.3
BIS	Business Integration Labels	10.0.30.48
BIS	Business Integration Licenses	10.0.30.48
BIS	Business Integration	10.0.30.48
BIS	Business Integration Master Data Management	10.0.30.48
Common*	TCLCommon	1.0.0.23
Common*	TCLLabel	1.0.0.23
Common*	TAICommon	10.0.16.202213
Common*	TAIConnection	10.0.16.202213

*Note: New models introduced for the PLM integration for Engineering Change Management 10.0.30.8 for D365 for Finance and Operation(10.0.30) release.

The PLM Integration for Engineering Change Management is compatible with the following solutions for Dynamics 365 for Finance and Operations 10.0

Product	Remarks
Rapid Value	Optional, requires separate license
Advanced Maintenance and Service	Optional, requires separate license
Advanced Project Planning	Optional, requires separate license
Advanced Project Management I & II	Optional, requires separate license and separate deliverable which is shipped as the Advanced Discrete Manufacturing solution.

Note that it cannot be excluded that above solutions may require merge efforts when applying them in one combined installation. This may affect functions and features of one or more of these solutions.

1.4 Upgrade from earlier versions

Upgrading from previous versions is supported using the standard upgrade scripts. Upgrading to this version is only supported when upgrading from a 10.0 release with ECM.

See the installation guide for more details.

2. New features

2.1 New for this release

ID	Title	Description
157967	Create new PLM import scenario for releasing products and BOM's	<p>We created a new migration scenario 'ImportRelease' to release products and BOM's from the PLM staging journal. This staging journal can e.g. be populated via the existing data entities for PLM staging journal. With this import, the user can specify which products and/ or BOM's need to be released to which companies. Next to the correct scenario, the data in the staging journal to be provided is: Target company (journal header), ItemId, Version and BOMSite. When posting the journal, the user can indicate the level of BOM's that need to be released with the item. 0 means no BOM's, 1 means 1 level, 2 means 2 levels, ... and 99 means all levels.</p> <p>Please note: this scenario does not update data of the products in the engineering company, it only triggers the release.</p>

2.2 New for previous releases

Below lists only the releases for Product Engineering on 10.0 where new functionality is introduced.

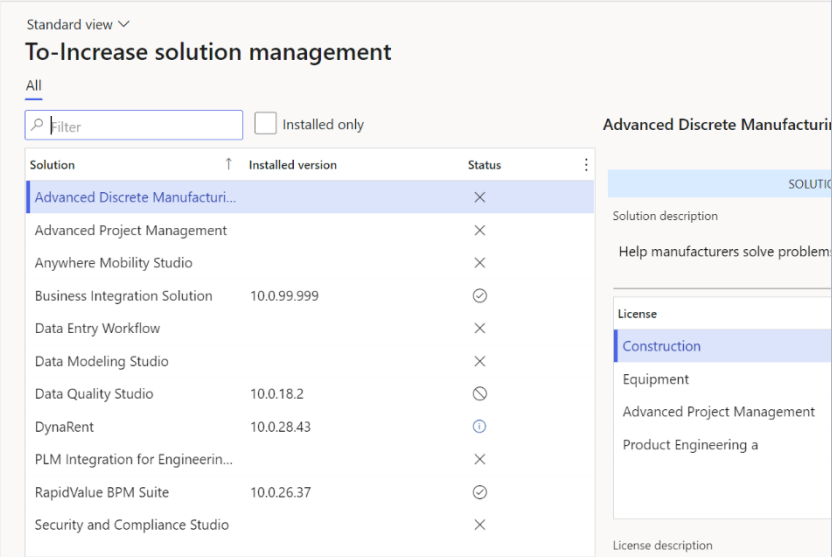
2.2.1 PLM Integration for Engineering Change Management 10.0.30.8

ID	Title	Description
95957	Add routing to PLM framework	<p>As part of our PLM integration framework, we have added the possibility of integrating PLM Bill of processing to D365 routes. With this, the PLM integration framework can create routes with operations, description records and resource requirements of the types Resource groups and Resources.</p> <p>Currently this is only supported for the ImportParts scenario.</p> <p>When getting a new PEPLM BIS message, the routing import mapping will be included by default. For the mapping with other BIS messages, please contact your To-Increase representative.</p> <p>The data routing fields are also added to the data entities for the PLM staging journal. Please note that the data entities need to be refreshed in the Data management framework parameters. To update the Composite staging journal data entity, please follow the following steps:</p> <ol style="list-style-type: none">1. Delete composite entity "Composite staging journal" in the Data management\Data entities. Ensure you have removed all the import/export project this composite entity.

		<ol style="list-style-type: none"> 2. Click 'Refresh entity list' button in the Data management\Framework parameter\Entity settings (Tab) 3. Now the child entities should appear the all the entities of the composite entity delete in step 1.
106268	Support multiple routes in the PLM integration	<p>The PLM integration can support multiple routes for the same product version. To allow this the field Route reference is added to the staging journal. With this field, PLM can indicate for which route an update is sent.</p> <p>Also a parameter is added to the PLM system 'Exclude routes of previous engineering versions'. The default value is No, which makes sure that when a new version is received from PLM, all existing routes on the previous version will be copied to the new version (also the routes that are not received from PLM). In case the value is set to Yes, the following will happen: in case a new version is received from PLM, only the routes that's sent from PLM will be received on the new version. Any other routes on the previous version (manually added or from PLM with a different ROuteReference, will not be copied to the new version. In case an update is done to an existing version, this parameter has no influence.</p>
158510	Add PLM references to the upload of BOM lines	We have added the PLM reference to the data entity Bill of materials lines V3 (BOMBillofMaterialsLineV3Entity). With this, it is possible to use the data entity for also uploading PLM-BOM-lines and non-PLM BOM-lines in e.g., a data migration scenario
158512	Create a new data entity for uploading documents to the engineering version including PLM references	We have created a new data entity to upload documents to the engineering company, including PLM references. This is the data entity Engineering document (EngPlmReleasedProductVersionDocumentEntity). With this, it is possible to use the data entity for also uploading PLM-documents and non-PLM -documents in e.g., a data migration scenario
158521	Create new PLM import scenario for importing records with and without PLM references	<p>We created a new migration scenario on the PLM staging journal to import PLM products into the PLM staging journal. This can e.g. be done via the existing data entities for PLM staging journal. With this import, the user can specify if a BOM has a PLM reference and therefor is owned by PLM or not. On the BOMlines, the PLM reference can be specified as well, with the same goal: is the line owned by PLM (and therefor part of the data ownership governance) or not.</p> <p>With this new migration scenario, it will be easier to migrate PLM part with PLM owned BOM(line)'s and local BOM(line)'s.</p>
159792	Uptake of common library	<p>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.</p> <p>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.</p>

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.



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.

?

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5 - Excellent
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 3
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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.

2.2.2 PLM Integration for Engineering Change Management 10.0.30.1

ID	Title	Description
154748	Add the file history form from BIS to the runtime BIS license	In case of a runtime BIS-license for the PLM integration, it is now possible to reset the 'File in use' checkmark when the File history form is opened from the message

2.2.3 PLM Integration for Engineering Change Management 10.0.29.2

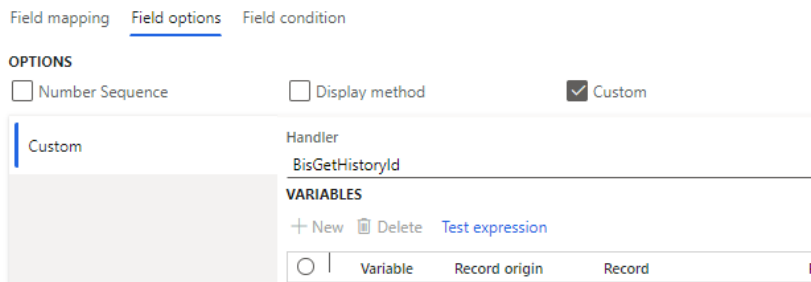
ID	Title	Description
95965	Product Logistic Insights	<p>We have introduced a series of API's which can be utilized to expose logistical product information outside of D365. When customers will embed web service calls to these API's as part of their PLM installation, the engineers working daily in PLM will have insight in the logistical status of the products. This information can be used to make better informed decisions in the change process and have a better insight in the logistical impact of those changes. We have API's available for the following information:</p> <ul style="list-style-type: none"> • Request the cost price of product X, version Y in engineering company • Request the cost price of product X, version Y in all companies • Request the open transactions of product X, version Y in all companies

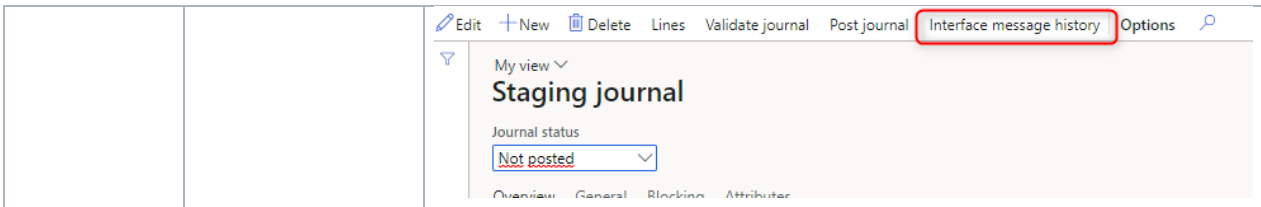
		<ul style="list-style-type: none"> • Request the on hand inventory of product X, version Y in all companies • Request in which companies does product X, version Y exist • Request the primary vendor no and name of product X per company • Request approved vendor no's, names and dates of product X per company <p>The framework in which we provide these API's can be extended easily by us in the future, but also by customers or partners themselves. Please reach out to us in case you have want to know more about the Product Logistic Insights and/ or it's extensibility.</p>
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2.2.4 PLM Integration for Engineering Change Management 10.0.26.3

ID	Title	Description
144977	Make File history form editable, so it can be opened to view more details	In last release we connected the message with the PLM staging journal and the message- and file history could be viewed from there. Now we have made the file history 'editable', so more information can be found when opening the record

2.2.5 PLM Integration for Engineering Change Management 10.0.26.1

ID	Title	Description
142808	Connect message with PLM staging journal and be able to open the message history/ file history from PLM staging journal	<p>We created a possibility to connect the PLM staging journal to the file history of the message in BIS. This will give the option to directly find the file which is used to create the staging journal and can be helpful in case of an error in the PLM staging journal.</p> <p>To enable this option, some settings need to be done in the BIS message:</p> <ol style="list-style-type: none"> 1. On the target document, on the Journal record, add the field 'InterfaceMessageHistoryRecId' 2. On the message itself, on the Journal record, add the field 'InterfaceMessageHistoryRecId', set a checkmark in the Custom column and in the Field options, add the handler 'BisGetHistoryId'  <p>On new imports (not existing), you now can see the new button 'Interface message history' enabled</p>



2.2.6 PLM Integration for Engineering Change Management 10.0.25.1

ID	Title	Description
135019	Improve error message when BOM number sequence is set to manual	We have improved the error message when a BOM is imported via the PLM integration, and the number sequence for BOM's is not set to automatic

2.2.7 PLM Integration for Engineering Change Management 10.0.22.1

ID	Title	Description
129817	Create business event for posting PLM staging journal	Two business events are created for posting the PLM staging journal. One for successful posting (EngPlmStagingJournalPostedBusinessEvent) and one for failures during posting (EngPlmStagingJournalPostFailedBusinessEvent). Business events provide a mechanism that lets external systems receive notifications from Finance and Operations applications. For more info see https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page . To-Increase can provide a logic app which can send emails based on the business events. This is not a full developed app, but can serve as inspiration for your own logic app
131549	Create business event for processing ECO	Two business events are created for processing the ECO. One for successful processing (EngPlmEcmHeaderProcessedBusinessEvent) and one for failures during processing (EngPlmEcmHeaderProcessingFailedBusinessEvent). Business events provide a mechanism that lets external systems receive notifications from Finance and Operations applications. For more info see https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page . To-Increase can provide a logic app which can send emails based on the business events. This is not a full developed app, but can serve as inspiration for your own logic app

2.2.8 PLM Integration for Engineering Change Management 10.0.20.2

ID	Title	Description
126592	Name and description are not mandatory anymore	In line with standard D365, it is now not mandatory anymore to give a product name (or description) when creating or updating products. This is applicable when posting a staging journal (ImportParts)

129214	Lookup on different fields of the PLM staging journal	To ensure a better experience while testing with the PLM staging journal, lookups are added for: Product Category name, BOM site, Unit, ItemId. Product owner, Name (attributes section) and BOMLine.ItemId, BOMLine.Version, BOMLine.Configuration, BOMLine.Color, BOMLine.Size, BOMLine.Style and BOMLine.Unit
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2.2.9 PLM Integration for Engineering Change Management 10.0.19.6

ID	Title	Description
123114	External engineering organization can be created as an organization instead of as a team	The creation of an external engineering organization is changed. Instead of the need to first create a team and use that, the system will create an organization based on the given name. This organization can be found under Organization administration/ Global Address Book/ Global Address Book

2.2.10 PLM Integration for Engineering Change Management 10.0.16.3

ID	Title	Description
	PLM Integration for Engineering Change Management	Initial release of PLM Integration for Engineering Change Management

2.3 New D365 functional topics considered for this release

No functional topics were considered in this release.

2.4 New D365 functional topics considered for previous releases

Below lists only the releases for PLM Integration for Engineering Change Management on 10.0 where new D365 functional topics are considered.

2.4.1 PLM Integration for Engineering Change Management 10.0.19.2

ID	Title	Description
MS1	New fields on the ECO	Microsoft has added new fields on the Engineering Change Order: 'New item number' and 'New version'. Our PLM Integration is aligned with these new fields
MS2	New impact option on the ECO	Microsoft has added a new impact option on the Engineering Change Order: 'New variant'. Our PLM Integration is aligned with this new impact option

2.5 Discontinued features as per current release

No functional topics were discontinued in this release.

2.6 Discontinued features as per previous releases

While this is a new product, this chapter is not applicable.

3. Fixes summary

3.1 Fixes for this release

No new fixes are applied in this release.

3.2 Cumulative fixes from previous releases.

Below lists only the releases for PLM Integration for Engineering Change Management on 10.0 where fixes have been provided.

3.2.1 PLM Integration for Engineering Change Management 10.0.30.1

ID	Title	Description
152927	Setting of change types on ImportECO scenario is not optimal	The change type setting on the ImportECO scenario is improved in the following scenario's: <ul style="list-style-type: none">• The engineering attributes• The BOM lines and BOM header

3.2.2 PLM Integration for Engineering Change Management 10.0.29.2

ID	Title	Description
152199	Effective from date is not reset in ImportECO scenario (and Enforce effectivity = No)	In case Enforce effectivity is set to No, the new version imported via PLM will not inherit the effective from date of the previous version anymore. The date will be set to blank (unless the PLM integration specifies otherwise)
153095	Template BOM with ImportPart does not take BOMlines with PLM reference	In case a TemplateBOM is applied when creating a new BOM from PLM, all BOMlines from the template are used
153345	Able to delete a BOM line on a BOM from PLM in the engineering company	In case a BOM that is integrated from PLM also has manual added BOM lines, the system will not allow anymore to delete the BOM lines from PLM when a multi-select is used on the BOM lines

3.2.3 PLM Integration for Engineering Change Management 10.0.28.1

ID	Title	Description
147987	Error on updating/adding	Editing the legal entity data is possible again

	calendar in Legal entities	
148412	When PLM updates a site on a BOM, the BOM version is ignored	When PLM updates the site on a BOM, the BOM version table is now also updated
152122	PLM import via ImportECO, does not inherit all field settings from the existing BOM line PLM for ECM	When a BOM line is updated from PLM, more enriched fields like LineType are now saved on the updated BOM line

3.2.4 PLM Integration for Engineering Change Management 10.0.25.1

ID	Title	Description
133126	Updates of notes via PLM does not work PLM for ECM	It is now possible to also update notes via the PLM integration
139953	Naming rule for name doesn't work in ImportPart scenario	The attribute based naming rules are working now also for the ImportPart scenario

3.2.5 PLM Integration for Engineering Change Management 10.0.22.1

ID	Title	Description
128301	Add lookup to BOM site field on the PLM Staging Journal PLM for ECM	We fixed the lookup for the BOM site in the PLM staging journal

3.2.6 PLM Integration for Engineering Change Management 10.0.21.8

ID	Title	Description
129183	Data Import Problems with Entity "Staging Bom attribute values"	The issue where not all staging journal BOM line attributes could be imported, is resolved

3.2.7 PLM Integration for Engineering Change Management 10.0.20.2

ID	Title	Description
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112109	Engineering attribute manual enrichment is lost when going to a new version (ImportPart)	Manual enrichment of (non-PLM) engineering attributes is working in all PLM import (ImportPart) scenario's again
126603	Update rule 'overwrite' on PLM system does add 2nd line instead of overwrites	The update rule 'Overwrite' on the PLM system works again as designed and doesn't add the imported line twice
128165	Update BOM with "impossible" units	It is not possible anymore to change the unit of measure on an existing BOMline, if there is no conversion setup between the unit of measures. This was possible via the PLM Integration

3.2.8 PLM Integration for Engineering Change Management 10.0.19.6

ID	Title	Description
124744	Delete Bom lines (engineering controlled) from Designer should be prevented	As per the data ownership rules for BOM lines, the BOM lines coming from the PLM integration are now also safeguarded from being deleted in the BOM designer

3.2.9 PLM Integration for Engineering Change Management 10.0.18.2

ID	Title	Description
122404	Attribute lookup in engineering product category mapping on PLM system misses the lookup	The attribute lookup in the engineering product category mapping on PLM system is restored

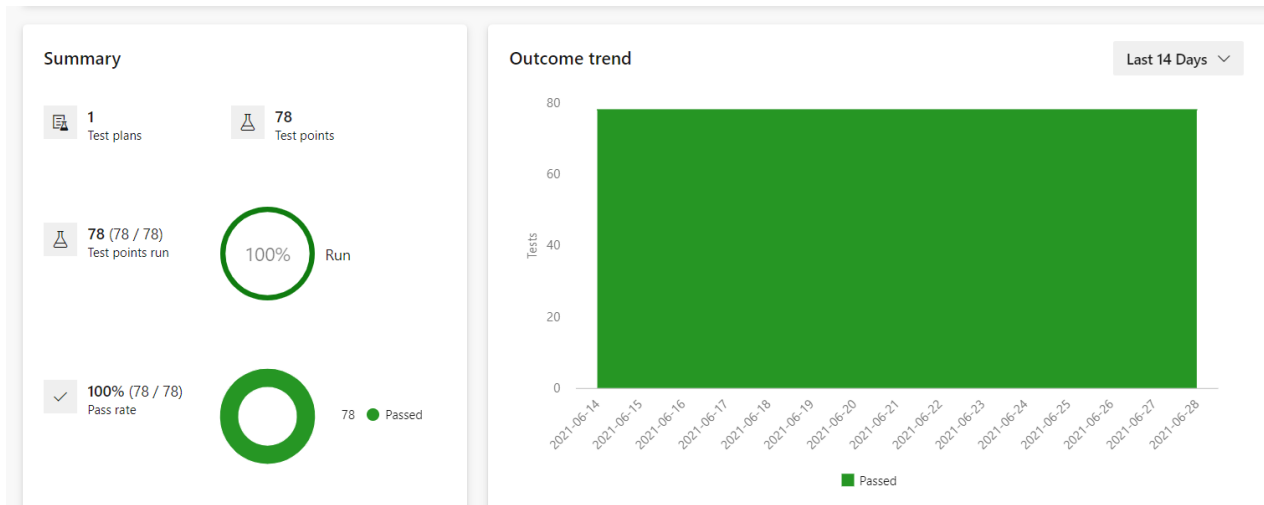
4. Known Issues

Below is a list of known issues of PLM Integration for Engineering Change Management.

ID	Issue
1	The multi BOM scenario in an ImportECO scenario is currently not supported in case not all BOM's are transferred to a new version. The ECO in Engineering Change Management currently doesn't allow to delete an existing BOM (the BOM that is not carried over to the new version).

Please note: 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.

5. QA KPIs and Test Execution Results



Quality Control - Reporting and KPI's			Target
*QA Dashboard(s) - Source	Type	Datapoints	KPI's
DevOps	Project Stats	Build & Deploy Success %	100%
DevOps	Dashboards - Quality Dashboard	Feature Coverage (Total / with test case / without test case)	> 80%
		Feature Criticality Coverage. Features defined as critical = HIGH and MEDIUM need 100% Test Cases Coverage	100%
		Automated (vs Manual)	> 80%
DevOps	Test Plans - Progress Report	Test Points Run (Automated plus Manual)	100%
		Pass Rate	> 90%
DevOps	Known Issues (Unresolved Post Release Defects)	Known Issues (Unresolved Post Release Defects) listed in release notes	100%