TO INCREASE

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Advanced Manufacturing and Project Planning 10.5.9.145 for Dynamics 365 for Finance and Operations 10.0

Release Notes

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Document Information

Title	Advanced Manufacturing and Project Planning 10.5.9.145 for Dynamics 365 for Finance and Operations 10.0
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Solution Suite	Advanced Manufacturing and Project Planning
Category	Release Notes
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1. General

1.1 Purpose

This document describes the functionality developed for Advanced Manufacturing and Project Planning 10.5.9.145 for Dynamics 365 for Finance and Operations 10.0.

Purpose of this release is:

Topic	Yes/ No	Remarks
Update to new Microsoft release	Yes	
New features	Yes	
New D365 functional topics considerations	No	
Bug fixes	Yes	
Discontinued features	No	

See chapter 4 for known issues.

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

Advanced Manufacturing and Project Planning 10.5.9.145 for Dynamics 365 for Finance and Operations 10.0 is released on the following Microsoft Dynamics 365 build and this consists of the below deliverables.

Installed product version	Installed Platform version	Remarks
Microsoft Dynamics 365 for Finance and Operations 10.0.30	Platform Update 54 or higher	

Product	Version	Type	Remarks
AXTvp	10.5.9.145	Deployable package	
AXTctrl	10.5.9.145	Deployable package	
AXTplatform	10.0.11.13	Deployable package	

Important notes:

The minimal required AXtension® Planning & Control and AXtension® Invoice Processing versions for AXtension® Planning & Control - Subcontractor Management to work are:

AXtension® Planning & Control release 10.2.0.94

AXtension® Invoice Processing release 10.5.8.304

Advanced Manufacturing and Project Planning is compatible with the following solutions for Dynamics 365 for Finance and Operations.

Product	Remarks
Rapid Value	Optional, requires separate license
Advanced Maintenance and Service	Optional, requires separate license
Advanced Project Management	Optional, requires separate license
Product Engineering	Optional, requires separate license
Business integration Solutions	Optional, requires separate license
Invoice Workflow	Optional, requires separate license

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 Advanced Manufacturing and Project Planning license coverage

Advanced Manufacturing and Project Planning is governed by licenses that control access to specific functions and features.

Feature	License	Remarks
Task Planning (Project)	APP	For Projects and Project quotations
Resource Planning (Project)	APP	For Projects and Project quotations
Capacity overview (Project)	APP	For Projects and Project quotations
Task Planning (Production)	AMP	For Production orders and Planned production orders
Resource Planning (Production)	AMP	For Production orders and Planned production orders
Capacity overview (Production)	AMP	For Production orders and Planned production orders

When both licenses are present, Advanced Manufacturing Planning works seamlessly with Advanced Project Planning.

1.5 Certificate Renewal Information

As an Independent Software Vendor, we provide you with licenses which can be used to enable/use our solution. These licenses are based on a Microsoft certificate which is part of our solution. This certificate expires every 3 years, this year per 09-06-2023. At that moment it must be renewed, and new licenses need to be installed.

Please make sure you install the latest update before June 9th, as these releases do contain the new certificate. Together with this update, you must install the new license. New licenses will only work together with the new certificate.

In case you get an error message 'license is not valid' during installation, then there is a mismatch between license and software package. After installing the latest update and latest license, please verify by logging into the application and see the respective menus.

Please note that if you try to re-load licenses for standard D365 F&O (e.g., adding more users) before installing the latest version and license, it will cause a re-validation of all ISV licenses, and that will cause the license for the To-Increase solution to fail as the underlying certificate is no longer valid. Users can no longer make use of the functionality.

If you have not received the new license deliverable(s), you can obtain the new license(s) from To-Increase by sending an email to swdist@to-increase.com. Also, do not forget to mention the LCS project name and URL to which the license needs to be added.

After installing the update, the security certificate renewal can be completed in 3 simple steps.
Step 1: Install the update and navigate to the Solution Management Workspace
Step 2: Click the 'Retrieve available licenses' in the action pane.
Step 3: Validate the licenses for correctness and completeness and click import.

Click here for more information on the Solution Management Workspace.

1.6 Upgrade from earlier versions

Upgrade of Advanced Manufacturing and Project Planning from Advanced Project Planning for D365 7.3 onwards is supported via the use of the migration process and tooling as required to upgrade from Microsoft Dynamics 365 for Operations.

Important update:

If any customer plans to update to any build later than 10.0.29 for APM, you must uptake this latest release delivered on the top of 10.0.28 initially to get rid of any compilation errors.

1.7   Important License update

The code signing certificate that is used for licensing the Axtension solutions is renewed. New licenses must be installed with this or later versions.

1.8   Support for multiple languages

At To-Increase, we are constantly working to upgrade our solutions and encourage customers to participate by sharing feedback. We had earlier launched an in-app feedback option in our D365 solutions, where our customers can share their feedback and requests while using our solutions. We did receive multiple requests for translations in other (European) languages. We picked the most requested languages and added it to our roadmap.

From April 2023 release, we do support Advanced Project Management in 10 different languages out of the box. The user interface is, as part of the strategy, available in the next languages: English (US), German, French, Spanish, Portuguese, Dutch, Italian, Norwegian, Swedish, Danish.

To-Increase is using the Microsoft Dynamics 365 Translation Service for automated translations of user interface elements. In our solutions we use standard labels and new solution specific labels. The standard labels are already provided with translations done by Microsoft. The solution specific labels are now also available to users in more languages.

As we used automated translations and reused existing labels it might be the case that some translations are wrongly translated. With a single translation unit, the AI powered translation service is not aware if it should be translated as noun or verb. Some words do have multiple meanings, like "application". It could be related to recruitment or a software solution. If you come across such issue, please use the in-app feedback, or create a support case, so we can improve the translations for future releases.

If you are in the need for other languages or your business requires a different term, you can extend the label files with a small development effort.

If you have customizations on the translations in your current environment, check if this is done in a separate extension model and correct extension naming convention. If e.g., the name of the To-Increase label file in the English language is TILabel.en-US.label.txt, the new translation in German provided by To-Increase will get the file name TILabel.de.label.txt. Ensure your customization will then have a naming convention including the keyword extension. A German extension label file has then the name TILabel_extension.de.label.txt. The extension labels will have priority above the standard provided labels. You can also choose to remove your labels and uptake our new standard translations.

The next label file(s) are part of this release: List all label files.

LABEL.en-us.label.txt
LABEL.da.label.txt
LABEL.de.label.txt
LABEL.es.label.txt

LABEL.fr.label.txt
LABEL.it.label.txt
LABEL.nb-NO.label.txt
LABEL.nl.label.txt
LABEL.pt-PT.label.txt
LABEL.sv.label.txt

Excluded from our translations:

- To-Increase will continue to offer its services to customers and partners in English.
- Our website, product documentation, release notes, and any other updates will be available in English only.

2. New features

2.1   Common features

To-Increase is offering various add-on solutions. Some features and technical solutions are common or could be common for all 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 must use is expiring every three years, next up for renewal in 2023. Soon, 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.

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.

Submit   Cancel

2.2   New features for this release

ID	Title	Description
1059145F-01	Include negative Purchase Order Lines as committed costs	Committed costs should show both positive and negative lines
1058144F-01	Allow editing description of unconfirmed progress & estimate data set	It is now possible to adjust the description of the progress & estimate data set, while it is unconfirmed
1051133F-01	Add required number of resources to resource planning tooltip	The resource planning tooltip now also displays the number of resources for a task.

1050132F-01	Import template (insert below, insert above, insert as child)	When importing a template on a WBS, by default the template is imported as child of the selected task in the WBS. This functionality has been extended: - The user can select to import the template below, above or as child of the selected task. - When importing the template as child of the selected task the user can define what do to with incoming, outgoing links to the selected task. The user has the option to remove or re-direct these links.
1050132F-02	Double click on link to update relation	In the task planning double clicking on a link between two activities will open a dialog to change the properties of a link. The link properties can be edited for quotation and project tasks.
1050132F-03	Automatic creation of critical path ID	When creating a new (sub)project the critical path ID for the project can now be generated automatically depending on the new parameter 'Default critical path ID'. This parameter can have folling values: - Manual (Default value) - no critical path ID will be generated automatically - Unique per (sub) project - a critical path ID will be created for each new project. The ID is equal to the project ID - Project + sub-projects - the critical path ID for sub-projects is set to the critical path ID of the parent project
1050132F-04	Right mouse context menu	In the Task and Resource planning clicking with the right mouse in the Gantt now provides a context menu through which a lot of actions are available.
1050132F-05	Rename subcontractor management role	The role P&C subcontract manager has been renamed to [P&C] AXtension® Planning & Control Subcontractor manager.
1050132F-06	Allow summary tasks to be stored as template	It is now also possible to create a WBS template from a selected summary task in stead of always creating a template for a complete project WBS .
1050132F-07	Planning rearrange mode	The following options are moved from the arrange options to the toolbar above the Gantt control for easy access: - Move up - Move down - Indent - Outdent

		Added extra option 'Expand to' to expand or collapse project WBS to a specific level.
1050132F-08	Resource impact simulation	When editing a (multi) draft version, from the task planning a capacity overview form can be opened that shows the impact of the changes in the draft version on the role capacity for the project. This forms shows role capacity based on the published version against role capacity based on the draft version.
1050132F-09	Multi-select indent and outdent in Project Plan	It is now also possible to indent or outdent multiple rows at once from the Project Plan.
1050132F-10	Copy & Paste	It is now possible to copy a selection of tasks in the task planning and paste this selection in any task planning. When pasting a selection, the same options are available as when importing a template (paste above, below or as child). Some restrictions are:
		- It is not possible to copy a selection of tasks from different hierarchies (projects / quotations).
		- It is not possible to copy a selection that both holds a summary task and one or more child tasks of this summary task.
1050132F-11	Filter tasks with required competences on Resource Planning	On the Resource Planning it is now possible to filter on tasks which have required competences assigned.
1050132F-12	Required competences on task in published state	It is now possible to add task specific competences to a published task.
1050132F-13	Support for multiple draft alternatives in project task planning	In the task planning for projects it is now possible to create multiple draft versions.
1050132F-14	Specify the visualization mode to use for the collapsed state of a summary task	There is a new option available on a summary task to specify the visualization to use when the summary task is in collapsed state in the gantt.
1050132F-15	Update default P&C parameters	Modified default parameter settings when first created and removed unused settings.
1050132F-16	Import template (insert, below, insert above, insert as child)	When importing a template in the WBS and the template is imported as child of the selected task in te WBS the user has the option to adopt the CBS code of the selected task on the imported template tasks.
1050132F-17	New options in progress and estimate dataset to match transaction to budget	There is a new parameter available 'Match transactions to budget'. This parameter determines how the transactions are matched to the budget when a new progress and estimate data set is created.
		The available options are:
		= CBS code - Project category

		Progress master lines are grouped by CBS code and Project category = CBS code - Cost group Progress master lines are grouped by CBS code and Cost group = CBS code only Progress master lines are grouped by CBS code
1050132F-18	Improved error message when deleting a confirmed progress & estimate data set	Confirmed progress & estimate data sets cannot be deleted anymore. When trying to delete a confirmed progress & estimate data set the error message 'The record cannot be deleted' was given. This error message has been replaced by the message 'A confirmed progress & estimate data set cannot be deleted. Creating a new data set on the same day, at a later time will overrule the information'.
1050132F-19	Include committed costs in reporting for the budget	There is a new option available to collect committed costs for a budget. Committed costs are divided in two categories, hard committed and soft committed. = There are new parameters available to enable the committed costs = The committed costs can be collected from purchase orders and / or production orders related to the projects in the budget = Committed costs are added to the progress and estimate data sets = It is possible to drill through to the committed costs from the progress and estimate data set = Committed costs are added to the reporting data = It is possible to drill through to the committed costs from the reporting data

2.3   Discontinued features as per current release

No functional topics were discontinued in this release.

3.   Fixes summary

3.1   Fixes for this release

ID	Title	Description
1058144B-01	Adjustment request overview menu items not available for non-system admin users	Adjustment request overview menu items are now available for project assistants and controllers.
1058144B-02	Budget status on task planning incorrect.	In case the effort in hours for a budgeted task is adjusted, the budget status will be correctly reflected on the task planning after it has been published.
1057143B-01	Error message while creating a purchase order from item requirements with existing projects	There no longer appears an error message about an update conflict, while creating a purchase order from item requirements with existing projects.
1057143B-02	No resource on progress and estimate and reporting data set	It is now possible to add and view the name of the resource on the progress and estimate and reporting data set.
1056142B-01	Capacity Overview incorrect with efficiency 0	Capacity Overview showing incorrect value on the role when resource calendar working date used with an efficiency of 0%, the day should be considered as closed.
1055141B-01	AXtension material availability not correct	When determining the item availability icon parameter parameter 'Purchase / Production fulfilled when' was not taken into account. In all situations where any quantity was picked status would change to picked. This has been changed. When parameter has value 'Complete' the complete quantity must be picked to get the 'Picked' status. When parameter has value 'Part delivery' the parameter is set if any quantity is picked.
1055141B-02	Start date on the production/batch order is blank after dragging the order to a different date	When dragging a production/batch task to a different date in the resource planning, the start date on the product / batch order was not correctly updated. The start date was blank. This issue has been solved.
1055141B-03	Issue with WBS Template and AXtension Project planning	When configuration key 'Planning for Projects' is disabled, it is not possible to import WBS templates. This issue has been fixed.
1055141B-04	Project posted transactions - add columns	The column CBS code description is added to the project posted transactions page.
1055141B-05	CBS code dropdown list not available	The lookup on CBS code on different forms was no longer working for records that were not saved to the database yet.

1054139B-01	Task planning, column Resources not populated	In the task planning one of the columns that can be selected in the left side table is the column Resources. This column was only populated in case the Show resource availability toggle in the chart preferences was set to 'Yes'. This behavior has been changed so this column is populated always.
1054139B-02	No CBS code for transactions created via Time and Attendance	For project hour transactions that were created from the time and attendance registrations, the default CBS code for the transaction was not resolved. This has been changed. If the hour transaction is related to a project activity, the default CBS code is resolved based on the activity of the transaction.
1054139B-03	Non approved adjustments included in reporting data	The adjustment request with a draft status should not be taken into account for the Reporting data. This has been fixed now. Only adjustment request with the status approved will be taken into account.
1053135B-01	Database synchronization of views using field AXTvp_IsAdditionalDraft	There was an issue with the database synchronization of views using field AXTvp_IsAdditionalDraft from table ProjPlanVersionDetail in situations where no license for AXtension® Planning for Project is present. This issue has been fixed.
1053135B-02	Resource/Task Planning time/format to any language also translates text	Changing the date/time format in the user settings should not trigger any translation of text.
1053135B-03	Column CBS code not filterable in the Posted project transactions	It should be possible to filter or sort on column CBS in the grid of the Posted project transactions
1053135B-04	Zooming Gantt grid when Cluster Select is enabled	When the schedule tool Cluster Select is enabled in the task or resource planning, the Gantt grid will not zoom in or out when changing the time scale of the control using the mousewheel. This issue has been solved.
1053135B-05	Task planning End date difference in activity and Quick edit	Task planning End date difference in activity and Quick edit
1053135B-06	Copied activity still shows original staffed status	Now when an activity is copied, the original staffed status is no longer shown.
1053135B-07	CBS code on matching details does not support intercompany	CBS code on matching details does not support intercompany
1051133B-01	Drag/drop failed message	When the release planning was opened form the menu directly moving a task in time could result in the error 'Drag/drop failed'. This issue has been fixed.

1051133B-02	Object reference not set error when highlight reference is selected	When option 'Highlight References' is selected in the resource planning and a reference production order was not loaded in the resource planning the error 'Object reference not set to an instance of an object' was given. This issue has been fixed.
1051133B-03	Unable to delete projects	When parameter 'Default critical path ID' is set to 'Manual', no initial critical path id is generated when creating a new project. This resulted in an error when deleting a project. This issue has been fixed.
1051133B-04	Disable world view in AXtension® Planning & Control for production	The option 'Show world view' was available in the resource planning View options. This option has been removed.
1051133B-05	Planning for Project task planning buttons are greyed out	When license configuration for Planning & Control Cost Control is disabled the Task planning for a project is empty and all the buttons are disabled. Note: unused field AXTpcc_CBSCodeRefRecId removed from view AXTvp_WBSProjPlanVersionView.
1051133B-06	Error when opening sales order form if no AXtension® Cost Control license is active	When license P&C Cost Control is not enabled an error occurs when opening the All Sales Order form: "You are not authorized to access table 'Activity item requirements'"
1050132B-01	Filter on competence	When adding a human resource with specific competences in the 'Edit assignments' form, the lookup showing matching resources was not shown. This can be caused by the feature 'Enable project resource scheduling performance enhancement feature'. When this feature is enabled, no resources were shown. This issue has been solved.
1050132B-02	Confirmed Shipment date change in multi-pegged explosion	When item tracking is set to either start or end date of task and confirmed ship date, the explosion of a pegged supply item should respect the setting and fill the correct date for confirmed ship date coming from the assigned task.
1050132B-03	Adding Item tracking to Planned Production orders	Item tracking information is added to the Planned production orders: - Item tracking icon and availability description are shown on the planned production order listpage based on the derived requirements. - Check item availability on planned production order list page. - Add toggle to include Planned production orders in Check item availability batch job. Add this option in the Check item availability batch job in the Project Management & Accounting menu.

4. Known Issues

- Initialise: Calendar does not exist
  In some cases, the message is thrown while launching the resource planning form in projects

- For resource assignments without a role do not show on the project resource planning but the assignments are there.

- When adding a human resource with specific competences in the 'Edit assignments' form, and in the competences one or more certifications are specified, the lookup does not open and one or more warnings ('Resource certificate search criteria was not applicable to the query'). Not closing this warning will open the lookup when trying again (the lookup only opens if the warning is still visible). This issue occurs when feature 'Enable project resource scheduling performance enhancement feature' is not enabled. This issue is caused by a standard D365 issue and is solved in 10.0.28.