

Advanced Project Management 10.0.39.57 for Dynamics 365 for Finance and Operations 10.0

Release Notes

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Document Information

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1. General

1.1 Purpose

This document describes the new functionality developed for Advanced Project Management 10.0.39.57 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 | |
| Bug fixes | Yes | |
| Discontinued features | Yes | |

See chapter 4 for known issues.

Cross reference to LCS solutions:

| Solution | Solution Version | Remarks |
|---|------------------|------------------------------|
| Advanced Project Management for Dynamics 365 10.0 | 57 | Monthly release of D365 10.0 |

1.2 Audience

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

Disclaimer: From the release 10.0.32.52, we intend to keep only relevant information on the features/change requests/bugs going with the current release. For information on previous release notes, please refer to the release notes archive [here](#).

1.3 Product release information

Advanced Project Management 10.0.39.57 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.39. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running

on D365 version 10.0.39 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.39, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.

| Release date | TI-Version number | Minimum required D365 version | Validated against D365 version | Compatible with D365 version |
|--------------|-------------------|-------------------------------|--------------------------------|------------------------------|
| 19/04/2024 | 10.0.39.57 | 10.0.39 | 10.0.39 | 10.0.39 and above |
| 11/04/2024 | 10.0.38.56 | 10.0.36 | 10.0.38 | 10.0.36 and above |

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : [Knowledge Base - Support - To-Increase](#)

#Note: From D365 7.3, Microsoft has changed the way additional Dimensions are handled. The goal for this move is to enable adding additional Dimensions in the application via code extension instead of over layering. Microsoft has introduced a Dimension framework in 7.3 to enable this, the implementation of this framework is treated as a transition process by Microsoft. Practically this means that any fix from Microsoft that they classify as an extensibility request is only delivered in the latest D365 release and that such fix is not backported.

With the introduction of the Dimension framework in D365 7.3 it has become the VAR's responsibility to implement any specific Dimension (such as the Project dimension) in the framework. To give the VAR a head start, To-Increase has created a separate model which can be used as a template by the VAR which implements the Tracking dimension "Project" as the newly introduced InventoryDimension08. As part of this deliverable To-Increase will evaluate case by case whether it will honour any requests for fixes which are resulting from Microsoft not backporting fixes as mentioned above. To-Increase makes no promises that it can and will fix all bugs that Microsoft does not backport.

In case multiple ISV solutions have been installed which are adding Inventory Dimensions, the VAR needs to decide which dimension to use. To-Increase supports the implementation as delivered via the PbmPIMVAR (Project Inventory VAR) model in case another dimension is implemented by the VAR it is the VAR's responsibility to support this.

Advanced Project Management is compatible with the following solutions for Dynamics 365 for Finance and Operations 10.0:

| Product | Remarks |
|----------------------------------|---|
| Rapid Value | Optional, requires separate license and separate deliverable |
| Advanced Maintenance and Service | Optional, requires separate license |
| Advanced Project Planning | Optional, requires separate license. It is possible to create new tasks in Advanced Project Planning. However, we recommend creating new tasks in Advanced WBS. Features like sub projects, cost codes and equipment transactions are not part of APP. |
| Product Engineering | Optional, requires separate license and separate deliverable |
| Business Integration Solution | Optional, requires separate license and separate deliverable |

1.4 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.

1.5 Model delivery – Discontinued.

Models are no longer going to be released from “Advanced Project Management 10.0.34.53” release onwards. If you still require the models, please contact our support team with a business reason.

#Note: If you have installed models from any of the previous releases of APM, you must remove them before installing APM 10.0.34.53 or later.

1.6 APM license coverage

Advanced Project Management is governed by three licenses that control access to specific functions and features.

| Feature | License | Remarks |
|---|-----------|---------|
| Project Logistics | APM I | |
| Project Inventory | APM I | |
| Quotation Statement | APM I | |
| Quotation Margins | APM I | |
| Project Change Orders | APM I | |
| Advanced WBS <ul style="list-style-type: none">• Sub-projects in Quote WBS• WBS template | APM I | |
| Advanced WBS <ul style="list-style-type: none">• Summary / Detail• Quantities and units• Progress & Earned value• Budget and budget allocation• Subcontracting• Progress billing• Equipment transactions• Cost breakdown (CBS)• Estimating and formulas• WBS integration | APM II | |
| Equipment | Equipment | |
| Options and alternatives | APM II | |
| Cost codes | APM II | |
| Calculation and bid rates | APM II | |
| Additional costs | APM II | |

| | | |
|-----------------------------------|-----------|--|
| Subcontracting | APM II | |
| Progress billing | APM II | |
| WBS cost control | APM II | |
| Equipment costs and revenue | Equipment | |
| Timesheets | APM II | |
| Pricing via Construction template | APM II | |
| Quotation Statement | APM I | |
| Quotation Margins | APM I | |
| Advanced Project Costing | APM I | For the Analytics section of the Advanced project management workspace Power BI is required, as with the Analytics section of other workspaces in D365 FO. |

Important: In this release, Advanced Project Management I (APM I) and Advanced Project Management II (APM II) are only supported with active licenses for both, it is not possible to run Advanced Project Management I without the license for Advanced Project Management II.

1.7 Upgrade from earlier versions

Upgrade of APM from APM 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.

From 8.1 to 10.0, there are no upgrade scripts required. Please refer installation guide for further information.

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.

1.8 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.

1.9 Must read: Update to D365 F&SCM 10.0.39

Problem statement:

Microsoft introduced a breaking change in 10.0.39 which impacts APM solution with Equipment license. The issue is focused on customers on 10.0.39 that use our APM solution and having an Equipment license. If you do not have an Equipment license, you do not experience this issue.

Potential breaking change – Fixed via current release.

If your project contains Equipment type Sales quotation lines and you transfer these to a Project phase, you will get an error stating the following and the entire transfer to Project process will fail.

"The category <XXXX> is mapped to an incompatible transaction type Equipment. This mapping is invalid and would result in corrupted forecast data. To proceed, please add the compatible category to the transaction type."

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 expires 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.

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 detailed view for 'Advanced Discrete Manufacturing' is shown, indicating that the solution is not installed. Below this, there is a table of licenses with columns for 'License', 'Status', and 'Expiry date'. The 'Construction' license is highlighted.

| 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.

2.2 Feature deprecation effective February 2024

You may have already been informed by Microsoft, that licenses that are generated using the SHA1 algorithm will no longer be supported starting at Microsoft Dynamics 365's F&SCM version 10.0.39. This update is generally available in LCS.

As we currently use the SHA1 algorithm for our licenses, there is an action for you to take to ensure you can continue using our services. We introduce the new SHA256 algorithm for our licenses, which will be supported going forward by Microsoft.

What do you need to do **before updating to version 10.0.39?**

1. Please go to the Solution Management Workspace in your F&SCM environment
2. Retrieve and install these licenses based on the SHA256 algorithm. You can find a guide on how to do that under this link

After retrieving and installing the new license, you can upgrade to version 10.0.39 without any interruptions to our services.

There should be no effect on any of your performance. In case you experience any effect, please reach out to us under customeroperations@to-increase.com.

2.3 New features for this release

| Title | Description |
|---|---|
| Enhance project publish experience | Project publish experience is all new with this release with the introduction of Async operations that get automatically triggered during the project publish. These async processes are triggered both for project publish and discard. |
| Batch mode introduction for Run WBS calculation | Run WBS calculation is needed to refresh some values in the work breakdown structure on different tabs. Now, this can be run in the batch. |
| Cost prices in quotation statement | Users can now see the cost prices in the quotation statement. However the scope is a bit limited to read only for this release. Option to edit the cost price or amend it, fetching the cost price from the WBS instead of project price matrix to align more with APM pricing priority based on quotation statement will be introduced in upcoming releases. |
| Add filters for equipment selection | Filter based on equipment type is enabled for equipment selection on WBS for quotations projects and change orders. The same is available in project forecasts and journals too. |
| CS00227303 Create forecasts in Async mode. | While using task planning from AMPP (Advanced Manufacturing and Project Planning), if tasks are modified, forecasts are not automatically created, and this creates data discrepancy. This was now resolved with automatic creation/updating of forecasts in Asynchronous mode. |

2.4 Fixes for this release

| Id | Description |
|--------|--|
| 129113 | Progress bills with retention values triggered errors during refresh. This was fixed. |
| 184123 | CS00232307 Can't enable "SQL row version change tracking" feature in D365. This was fixed. |
| 187945 | Copy new quotation gives error: Cannot create a record in ProjPlanVersionDetail. This was fixed. |

| | |
|--------|--|
| 188571 | Quotation created using copy quotation functionality cannot be transferred to project. This was fixed. |
| 184487 | CS00232435 Add Line in project quotation is inactive – This was made active now. |

3. Known Issues

3.1 Known issues for this release.

No Known failures.

3.2 Known issues from previous releases.

| ID | Title |
|---------------|---|
| AX-ADM-161006 | When progress bill is set to OFF the bid rate is not getting calculated correctly for Time and Material project. |
| AXADM-45275 | With progress bill retention and retention tax is calculated at root project. Apply Tax calculation at sub-project level for retentions is not yet supported. |