

Advanced Project Management 10.0.26.44 for Dynamics 365 for Finance and Operations 10.0

Release Notes

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Document Information

Title	Advanced Project Management 10.0.26.44 for Dynamics 365 for Finance and Operations 10.0
Subtitle (Subject)	Release Notes
Solution Suite	Advanced Discrete Manufacturing
Category	Release Notes
Author	Product Management
Published Date	6/1/2022
Status	Final

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1. General

1.1 Purpose

This document describes the new functionality developed for Advanced Project Management 10.0.26.44 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.

Cross reference to LCS solutions:

Solution	Solution Version	Remarks
Advanced Project Management for Dynamics 365 10.0	44	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.

1.3 Content list

Advanced Project Management 10.0.26.44 for Dynamics 365 for Finance and Operations 10.0 is released on the following Microsoft Dynamics 365 for Operations build

Installed build version	Platform build version	Remarks
Microsoft Dynamics 365 for Finance and Operations 10.0.22	Platform Update 46 or higher	

#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 29-08-2020. At that moment it must be renewed, and new licenses need to be installed.

Please make sure you install the latest update (from May 2020 update onwards) before August 29th, 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, which are part of the May 2020 update onwards. The May 2020 update onwards will only work with the new license(s).

To-Increase has planned to upload the new licenses to your LCS project right after release the May update, normally the first working day of the new month. So before installing this new update, please check if the new license(s) is in your LCS. 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.

1.5 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 	APM II	

<ul style="list-style-type: none"> • Cost breakdown (CBS) • Estimating and formulas • WBS integration 		
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.

1.6 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.

1.7 Telemetry data

At To-Increase we continuously investigate how to improve the user experience of our products; therefore, we will collect application usage data ('telemetry data') from our applications. We will anonymize any personal data and therefore will only use data which cannot be related to individual persons for this purpose. Furthermore, we will delete the telemetry data from our systems after 12 months. If you would like to opt-out, please contact us.

2. New features

2.1 New for this release

Title	Description	
Subcontract design change	Following are the changes done to the subcontracts.	
Action	Existing behaviour	New behaviour
Subcontract is activated	<ol style="list-style-type: none"> It adds a service item to the estimates. 	<ol style="list-style-type: none"> It adds a service item to the estimates All the original estimates that are subcontracted will be deleted. Although the estimates are deleted, we will retain these forecasts against the forecast model SUB for reference purposes.
Update Quantity button on the subcontract.	This button updates forecast quantity on the subcontract.	As is.
Update PO line button.	<ol style="list-style-type: none"> Updates Purchase order line with the latest values quantity and prices) in the subcontract. Updates the item forecast line with the same information, as in the purchase order lines. 	<ol style="list-style-type: none"> as is as is. Updates the item estimate (service item estimate added after subcontract is activated) with the same cost same as the subcontract rate/value.
Formulas during PCO/ Draft-Publish	<ol style="list-style-type: none"> Quantity in the estimates will be calculated and changed as per the formulas whenever forecast quantity is modified. 	<ol style="list-style-type: none"> Formulas will be inactive, and the latest modified forecast quantity will be defaulted to the service item estimate's qty.

2.2 New for previous releases

2.2.1 New for Advanced Project Management 10.0.25.43 for Dynamics 365 for Operations 10.0

Title	Description
Added new filters to the requirement page project logistics.	Three new enhancements are made to the requirements page in project logistics, for ease of filtering the data. <ul style="list-style-type: none">Added a filter to the product name field: Provided an option to filter by the product name to filter if there are multiple items.Filter on the vendor account number: The list page currently does not have an option to sort or filter by vendor account. Now we have added a filter on vendor account and then firm or confirm all the orders for that vendor.Added a column for vendor name: Added a display column for 'Vendor name' for better understanding on who the vendor is., in addition to the account number.
Enable Summary & Detail in the integration journal for quotations (APM).	At present, only projects, standard activities and estimates are supported. We extended it support summary and detail activities.
Use financial dimensions from the asset when creating expense journal.	Financial dimensions are taken from the object when available as those dimensions are more specific then the generic ones for the equipment project.

2.2.2 New for Advanced Project Management 10.0.24.42 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.3 New for Advanced Project Management 10.0.24.41 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.4 New for Advanced Project Management 10.0.23.40 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.5 New for Advanced Project Management 10.0.22.39 for Dynamics 365 for Operations 10.0

Title	Description
Copy to a new quotation	The function 'Copy to new quotation' can be used to create a new quotation from an existing quotation. It can be used to support scenario's like: <ul style="list-style-type: none">Only a part of the quotation is accepted. With this feature, that part of the quotation can be copied into a new quote and can be converted into a project.

	<ul style="list-style-type: none"> • The quotation is accepted but will be awarded in time. Each time you copy a part of the original quotation into a new quote and process that quote. • The customer wants to see an alternative for the original quote. The quote is copied into a new one and you make your changes there. • During the quotation process we present 8 different versions of a quote. In the end the customer decides to approve version 4. That version is still available and can be used to create a project out of it.
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2.2.6 New for Advanced Project Management 10.0.21.38 for Dynamics 365 for Operations 10.0

Title	Description
Capability to transfer all the types of projects from quotation to project.	We allow transfer of all the project types from quotation to project. Until today, we allowed only Fixed price and Time and Material projects. For the project types for which project contract is not required, we made the contract greyed-out and the quotation will still allow us to transfer it to the project.

2.2.7 New for Advanced Project Management 10.0.20.37 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.8 New for Advanced Project Management 10.0.20.36 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.9 New for Advanced Project Management 10.0.19.35 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.10 New for Advanced Project Management 10.0.18.33 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.11 New for Advanced Project Management 10.0.18.32 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.12 New for Advanced Project Management 10.0.17.30 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.13 New for Advanced Project Management 10.0.16.29 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.14 New for Advanced Project Management 10.0.16.28 for Dynamics 365 for Operations 10.0

Title	Description
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New cost code validations for item estimates.	We have added a new validation which holds good only for the item transaction type. If the cost code standard at the project level is set to: Activity: Same "Item+ Category + Cost code" is allowed. Transaction: Same "Item+ Category + Cost code". Unlike the case for hour, expense, equipment, fee transaction types, different cost code cannot be entered for the same item + category combination.
Reference fields on the subcontract	Two new fields "Original cost rate and Original cost value" are added under the subcontract tab and on the subcontract details page. These fields are filled in when the user creates a subcontract for the first time. Thereafter, they will not be updated at all. They are kept for reference purposes.

2.2.15 New for Advanced Project Management 10.0.15.27 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.16 New for Advanced Project Management 10.0.14.26 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.17 New for Advanced Project Management 10.0.14.25 for Dynamics 365 for Operations 10.0

Title	Description
Add Reset status button to Production list page in project logistics.	This option is enabled for one production order or for a selection of multiple production orders. This is the standard option and standard validations are applicable
Add Report as finished button to Production list page in project logistics.	This option is enabled for one production order or for a selection of multiple production orders. This is the standard option and standard validations are applicable.
New column for vendor account in requirements list page in project logistics	This column will only show data in case of planned purchase orders and if the planned purchase order has a value for vendor.
Assign Vendor account option is added to the requirements list page in project logistics.	One or more planned orders can be selected, and a new pop-up screen can be used to add a vendor. The pop-up screen has just one field with a look-up to All vendors. Vendor account, once assigned will also update the item master record with the vendor account on the Purchase fast tab. But this is a one-time assignment and cannot be updated each time if a different vendor account is assigned. You will have to manually change it on the item master henceforth.
Change to button is added to the requirements list page in project	1. Change to planned purchase order: This button is only applicable for planned production orders. The user can select one or multiple planned production orders. The option will use the standard function to change a planned order.

logistics, which offers a variety of buttons.	<p>2. Change to planned production order: This button is only applicable for planned purchase orders. The user can select one or multiple planned purchase orders. The option will use the standard function to change a planned order.</p> <p>3. Change to Request for quotation: This button is only applicable for planned purchase orders. The user can select one or multiple planned purchase orders. The option will use the standard function to change a planned order. The selected orders will disappear from 'Requirement' after a refresh and will be visible in Project Logistics/Request for quotations.</p>
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2.2.18 New for Advanced Project Management 10.0.12.24 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.19 New for Advanced Project Management 10.0.12.21 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.20 New for Advanced Project Management 10.0.11.19 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.21 New for Advanced Project Management 10.0.10.18 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.22 New for Advanced Project Management 10.0.10.17 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.23 New for Advanced Project Management 10.0.8.15 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.24 New for Advanced Project Management 10.0.8.14 for Dynamics 365 for Operations 10.0

Title	Description
Data entities for timesheet	New data entities to see the scoped data for logged in users and delegated employees based on setup.

2.2.25 New for Advanced Project Management 10.0.7.13 for Dynamics 365 for Operations 10.0

Title	Description
Daily timesheet	Enhancements made in daily time sheet feature and the delegate process is improved

2.2.26 New for Advanced Project Management 10.0.6.12 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.27 New for Advanced Project Management 10.0.6.11 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.28 New for Advanced Project Management 10.0.5.10 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.29 New for Advanced Project Management 10.0.4.9 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.30 New for Advanced Project Management 10.0.4.8 for Dynamics 365 for Operations 10.0

No new features in this release

2.2.31 New for Advanced Project Management 10.0.3.7 for Dynamics 365 for Operations 10.0

Title	Description
Change of configuration key name	The configuration key names are changed as below From “Advanced project management” to “Advanced project management – I” From “Construction” to “Advanced project management – II”

2.2.32 New for Advanced Project Management 10.0.3.6 for Dynamics 365 for Operations 10.0

Title	Description
Warning message in PCO	Warning message in PCO to the user mentioning the forecast quantity cannot be less than claimed quantity

2.2.33 New for Advanced Project Management 10.0.2.5 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.34 New for Advanced Project Management 10.0.0.4 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.35 New for Advanced Project Management 10.0.0.3 for Dynamics 365 for Operations 10.0

No new features in this release.

2.2.36 New for Advanced Project Management 10.0.0.2 for Dynamics 365 for Operations 10.0

Title	Description
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New export button in Advanced WBS of a project	New “Export” button is introduced at the Advanced WBS committed view to enable the user to export the published project easily. Note has been provided in Export dialog box with “The changes/updates in draft version will not be exported till it gets published”. This helps the user to publish the version before exporting the template with changes.
Quotation statement	New radio button is added in Quotation statement form to show projects only or not. This helps you to work with desired data. The context is being carried out to Quotation statement form.

2.2.37 **New for Advanced Project Management 10.0.0.1 for Dynamics 365 for Operations 10.0**

Title	Description
Advanced WBS Edit	Prior to this release, you had to go to committed view and you could edit the Advanced WBS structure after that. This feature enables you to launch the WBS edit form directly from the Project Quotations form.
New filter control	New WBS Filters are designed to improve the user experience in such scenarios. It enables you to apply multiple filters, all aimed at assimilating the required data in a timely fashion. New filters feature is targeted at enabling the users to work easily with a large work breakdown structure by applying multiple filters to the data based on different criteria and extract a subset of information, specific to your needs.
Identification of changed activities/estimates in Advanced WBS	Now, the concept of identifying the changed activities/estimates are changed which improves the performance and the user experience. The rolling up calculations are no longer done while editing, instead they are now triggered by Run WBS. The exclamation marks are shown only at the changed activity and the root project (previously all levels in between were also shown).
Quotation statement filtering	User interface of Quotation statement is improved with filter control to work on the sub project levels. This enables you to work on the specific sub projects and simulate your results especially if you are working on a large WBS structure.
Hide / show schedule errors	In this release, the schedule errors are switched off by default. You can see the schedule errors by switching it on whenever required.

2.2.38 **New for Advanced Project Management 81.3.7.1 for Dynamics 365 for Operations 8.1.3**

No new features in the release

2.2.39 **New for release Advanced Project Management 81.3.16.1 for Dynamics 365 for Operations 8.1.3**

Title	Description
Bid Import	Bid import feature enables you to create a structure in Excel in a similar way as it is created in Advanced WBS. Different WBS line types task types like sub projects, Summary & Detail activity with estimates can be created. You can create multi-level project structures with relevant activity

	<p>structures as well estimate lines as required for your situation.</p> <p>Bid import is typically refers tender or a bid imported into AX from of a Microsoft Excel document, as the project work breakdown structure. This is very useful as the tenders often come in different layouts and the WBS often has a very large structure and is different each time. As the tenders have many rows, it is very time and effort consuming to input them manually.</p> <p>Bid import feature helps to import Microsoft Excel file into Project Quotation Work breakdown. It provides a user-friendly interface to make a quick setup and to import data into the database.</p>
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2.2.40 New for release Advanced Project Management 81.2.1.4 for Dynamics 365 for Operations 8.1.2

Title	Description
Advanced project costing and workspace	<p>The new Advanced project management workspace provides quick access and insight into a project or all active projects performance as well as a new analytics tab with earned value management calculations and charts. Various standard project performance calculations are added which allows to review the status of the project by common earned value management formulae.</p> <p>The earned value metrics are based upon progress as tracked in the Advanced WBS.</p> <ul style="list-style-type: none"> • My work tab provides quick access and counts to projects, subcontracts and project change orders. You can also access the WBS cost and project progress journals from this tab. • Analytics tab is embedded with Power BI set of charts to review the earned value calculations and other common project management tools to show a project performance. <p>For detailed information on installation and configuration please see the installation guide.</p>

2.2.41 New for release Advanced Project Management 81.1.1.9 for Dynamics 365 for Operations 8.1.1

Title	Description
Role Id	<p>The filed Role ID is added in the APM forms to schedule the resources instead navigating to Standard WBS form or APP form earlier.</p> <p>User can find the new field in</p> <ul style="list-style-type: none"> • Advanced WBS • Activity template • WBS template Export/Import • Project change order edit WBS • Project change order transfer to project <p>N.B.: The role Id is activated for activities only. See also 2.4</p>

2.2.42 New for release Advanced Project Management 81.20.2.2 for Dynamics 365 for Operations 8.1

No new features in the release

2.2.43 New for release Advanced Project Management 80.15.3.18 for Dynamics 365 for Operations 8.0

Title	Description
Auto generate WBS cost control	This feature allows you to create journals for one or all projects that fit the parameters
Revenue adjustment in WBS cost control	You will see the revenue adjustments to be created when creating a cost control journal.
Post cost control journal in a batch	It allows you to post all journals meeting the requirements at one time instead of one journal at a time.

2.2.44 New for release Advanced Project Management 80.15.2.12 for Dynamics 365 for Operations 8.0

No new features in this release

2.2.45 New for release Advanced Project Management 80.15.1.120 for Dynamics 365 for Operations 8.0

This release includes the functionality to propose and make changes to a project in structured way. This release is the as-is uptake of the Advanced Project Management for Dynamics 365 for Finance and

Operations Advanced Project Management 1712. The code base has been refactored to move to extensions-based approach as suggested by Microsoft. So, an additional effort may be required in case you have made any customizations on the previous version

Title	Description
Project change orders	<p>A change in scope of the project can be handled via a Project change order (PCO). This allows you to record a change at draft change. It enables you to be informed of other change orders to consider in the drafting, approving and finalizing of a given order. The PCO facilitates to implement the changes with transparency of data edited, and historic data changes to estimate lines, and node details.</p> <p>As such the PCO provides a more comprehensive change management in comparison with making changes directly to the project work breakdown structure via the draft / publish mechanism as available already in the Advanced WBS.</p> <p>A PCO will be based on an existing project. Changes will be made to existing activities and/ or new activities are added. After the changes are reviewed and evaluated the PCO will be reviewed internally and optionally also externally by the customer. After the PCO is approved, it will be transferred to the project and the changes are applied. The PCO remains as history and on the project a reference to the PCO will be available as well.</p> <p>The PCO's lifecycle is managed via statuses, including the transfer to project which updates the project with the changed data. After one PCO is drafted, other PCOs either before or after it are likely to be approved, and or transferred before the subject PCO. At the time of submission, you will be able to review the other PCOs for the same activity, and for the project to fully consider the update desired for this PCO.</p> <p>Change order Report: The report shows the details of the estimates with the change type to infer the changes incorporated in estimate lines. This change order can be generated, Printed or can be downloaded as you wish.</p> <p>For more details on the PCO, see also the what's new documentation for this release.</p>

2.2.46 New for release Advanced Project Management 1712.8.3.21 (January Release) for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 Update

Title	Description
Advanced Quotation WBS	In case the quotation currency (based on the customer default) is not the same as the base currency, all commercial values are displayed in the sales currency. The commercial values are converted into the base currency to display the right figures for margin and mark-up based on the base currency. Cost is always based upon base currency.
Advanced Project WBS	Above currency conversion applies for the advanced project WBS. In addition, the invoiced values are shown in the sales currency, but the LTD margin, mark-up and profit are calculated in the base currency
Quotation statement	To reduce unnecessary steps the quotation statement can also be opened from the Advanced WBS. Commercial values (like on-account contract values) are shown in the sales currency. The margin and mark-up calculator show the percentages based on commercial values which are converted back to the base currency
Equipment pricing	Equipment pricing has been extended with two variants both for cost price and sales price. Apart from equipment pricing based on the equipment category we can now also store sales and cost prices based on equipment type (like a small crane and a heavy crane). In addition, cost and sales prices can be stored based on individual equipment. If that object is selected in an estimate line or equipment journal, the right cost and sales price will be fetched based on equipment (object).
Pricing parameter	A new pricing parameter 'Use advanced pricing' has been added to the parameters for Advanced Project Management. If set to 'Yes' the following additional sales price setup is enabled; prices can be setup for a construction template and line property in addition to the standard options. This new parameter replaces the parameter 'Use line property for sales pricing' in previous versions.
Subcontract parameter	A new subcontracting parameter 'Default purchase order status' has been added to the parameters for Advanced Project Management. You can choose between confirmed and approved. Approved: The PO needs to be confirmed before a subcontract progress bill can be posted. Confirmed: you can

	post a subcontract progress bill without touching the PO
Fixed price for quotations and projects	In case a quotation is created with project type = fixed price, the commercial values for the project and the sub projects will be based on the on-accounts which can be created from the quotation statement. If no on –accounts have been created, the totals will show '0' with a negative margin and mark-up. In case of a fixed price project, the commercial values in Advanced WBS are based on on-account transactions.
Fee posting for WBS cost control	In previous versions a fee was posted automatically when posting a WBS cost control journal. The purpose of this fee is to keep the total sales value unchanged and keep the bid value as is. This will now only happen for projects with progress billing. In case of fixed-price or time & material projects, the forecast will be increased or decreased (no additional fee will be posted).
New dimension framework	Microsoft enables extensible inventory dimensions, so they can be used instead of over-layering the inventory dimensions. They provide a finite set of unused dimension fields. The Advanced Project Management feature for Project Inventory has been aligned with this new extensibility framework.

2.2.47 New for release Advanced Project Management 1707.8.3.21 (January Release) for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 Update

No new features have been added for this release. This release is the as-is uptake of the Advanced Project Management for Dynamics 365 for Finance and Operations Advanced Project Management 1707.8.2.20 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 update (1707) .

2.2.48 New for release Advanced Project Management 1707.8.2.20 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 Update (1707)

No new features have been added for this release. This release is the as-is uptake of the Advanced Project Management for Dynamics 365 for Finance and Operations Advanced Project Management 1707.8.1.10 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 update (1707).

2.2.49 New for release Advanced Project Management 1707.8.1.10 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 Update (1707)

No new features have been added for this release. This release is the as-is uptake of the Advanced Project Management for Dynamics 365 for Finance and Operations Advanced Project Management 8.0.1611.103 for Dynamics 365 for Operations Update 3 (1611).

2.2.50 New for release Advanced Project Management 7.3.1611.103 for Dynamics 365 for Operations Update 3 (1611)

No new features have been added for this release. This release is the as-is uptake of the Advanced Project Management for Dynamics 365 for Finance and Operations from Update 2 to Update 3.

2.2.51 New for release Advanced Project Management 7.1.27075.90 for Dynamics 365 for Operations Update 2

Title	Description
Advanced Quotation WBS	The advanced project quotation WBS can be used to create a WBS based on a project, sub-projects and activities. For activities, you can create standard activities or use summaries and details. A summary activity is an activity with pricing details but without estimates and will be presented to the customer. A detail activity is always linked to a summary, does not have sales prices and estimates and is not visible for the customer.
Equipment	In standard AX, 4 different transaction types can be used: items, hour's expenses and fees. With APM II, it is also possible to create estimate lines of type equipment. The equipment type is a mandatory field for an equipment estimate line and specific equipment categories can be defined. There is a special table for cost prices and sales prices for equipment categories.
Options and alternatives	In the quotation WBS, activities can be marked as an alternative for another activity. It is also possible to create an activity and mark it as an option. In the WBS overview, options and alternatives are excluded from the effort calculation and price calculation and a button can be used to hide or show those activities. When a quotation is transferred to a project, options and alternatives are dropped automatically.
Cost codes	Cost codes can be used to budget and track cost in a project. Cost codes are always linked to a standard that can be defined in the system. Based on the selected standard, cost codes can be attached to the quote and project. Cost codes are sometimes required for external reporting which would be based on an external cost code standard.

	<p>However, a company can also define its own standards and use them only for internal purposes. Cost codes can be set on activity level or estimates level.</p>
Calculation and bid rates	<p>Activities can be linked to a calculation group with one or more variables. An activity can be specified with a (scheduled) unit and a (forecast) quantity, e.g. 500 m², 1500 sqft, 10 pieces. Formulas (optional) can be linked to a calculation group and will be used in the quotation WBS to calculate the required hours, items and equipment based on the values for variables and the formulas. In case an activity is linked to a unit, the total cost value and sales value are divided by the forecast quantity and the result is a cost rate and a bid rate for the activity, e.g. the cost rate is \$8 per m³ and the bid rate is \$10 per m³.</p>
Additional costs	<p>An activity can be marked as 'Additional costs'. The total sales value for that activity can be distributed to other activities that will increase the sales value and as a result the bid rate. It is possible to exclude activities for the assignment of additional costs or limit the amount.</p>
Subcontracting	<p>From the Advanced WBS, activities can be selected for subcontracting. One or more activities can be selected, and a wizard is used to create a subcontract header with one or more lines. Once a subcontract line is activated, a purchase order is created automatically. The subcontract progress bill can be used to register and post the progress reported by the subcontractor. Posting a subcontractor progress bill will update the purchase order automatically.</p>
Progress billing	<p>Progress billing is a methodology to invoice a project based on progress which is registered for activities based on the associated forecast quantity and unit. If an activity has been defined for 500 m³ and a bid rate of \$20 per m³, a progress bill can be used to register the progress quantity. The progress quantity will be multiplied with the bid rate to calculate the progress amount per activity. The sum of all progress amounts will be the total amount on the invoice. An invoice proposal is created automatically once a progress bill is posted.</p>
WBS cost control	<p>WBS Cost control is functionality to monitor the project progress, adjust the cost budget and allocate the remaining budget in time. This can be done based on the project WBS or based on cost codes. Progress can be entered in a journal and</p>

	will be compared with the current posted costs. Based on those two figures the system will calculate a variance and suggest a percentage to decrease or increase the budget (this figure can be adjusted or ignored). Once the WBS cost control journal is posted, the forecast lines will be updated based on the adjustment percentage.
Equipment costs and revenue	An equipment journal can be used to post the usage of equipment on projects. For each posted equipment journal an additional expense journal is created automatically for the equipment project. This expense is posted as a negative value and be revenue recognition for the object. The same mechanism is available for depreciation postings. A depreciation journal is duplicated for the equipment project in case an object (equipment) is linked to a fixed asset. For each piece of equipment
Timesheets	The daily timesheet can be used for time registration on projects and can be combined with the usage of equipment and the consumption of items. The tab 'Daily notes' can be used for additional remarks, the creation of an incident or a maintenance request. Once complete, the daily timesheet can be submitted for approval. An approval form is available to approve and post timesheets. The weekly timesheet is similar but can be used to enter registrations for multiple days and for multiple workers.
Pricing	The pricing table has been extended for sales prices and cost prices for hours and expenses. The construction template is an extra level to define prices and the line property can be used to retrieve special prices in the project quotation. There is a separate table for cost prices and sales prices for equipment.

The following functions and features are **new** in comparison to the functions and features as present in Advanced Project Management for AX 2012 R3 CU10.

Title	Description
Usage of units and quantities	A new parameter has been introduced for quotations and projects. The parameter 'Use units and quantities' will enable or disable the fields for 'Scheduled unit', 'Forecast quantity', 'Calculated rate', 'Cost rate' and 'Bid rate'. This new parameter can be used for customers who like to use all the APM II features but run their projects as T&M or Fixed price projects and don't use progress billing.

	The parameter will be used as default but can be switched off on the quotation or project header.
Extended WBS overview for quotations	The advanced WBS for project quotations has been extended with some new tabs. The tab 'Cost and revenue' will show all the costs, the revenue, the rates and margins for activities, sub projects and the project. The tab 'Cost codes' will show the cost and revenue figure per cost code and cost code group. The tab 'Additional costs' can be used to set additional costs and review the distribution and updated calculation of the bid rate and value. The tab 'Subcontracting' can be used to assign a procurement category and trigger the subcontracting process for one or more activities.
Extended WBS overview for projects	The advanced WBS for projects has been extended with some new tabs. It has the same tabs as the quotation and some additional tabs which are relevant for projects only. The tab 'Progress and earned value' will show the actuals for costs, revenue and progress. Based on those figures the estimate to complete, estimate at complete and variation are displayed. The budget tab will show the original and actual value for cost and revenue based on cost control adjustment and published changes on the project. The tab 'Invoice and margins' displays the posted costs, the invoiced amounts and the LTD margin as percentage and value. All project types are supported. The tab 'Billing setup' displays the project type, project contract and invoicing method (FP, T&M or progress billing) for the project and the sub projects. The tab 'Budget allocation' will display the remaining costs distributed per month based on the start date and end date for activities.
Internal progress journal	In case progress billing is used, a value for internal progress can be entered in the progress bill. In the WBS overview, the earned value, EAC, ETC and variance are shown based on internal progress and posted costs. The journal for 'Internal progress' can be used and posted at any time to register the internal progress for activities. It can be used for all project types (T&M, FP and progress billing) and once posted, the Project WBS will show the actual figures.
Create a project without a quotation	In AX 2012 it was not possible to create a project using functions and features from APM. A project had to be created from a quotation. It is now possible to create a project from scratch with all the functions and features from APM. The

	'Publish' function should be used to create the project.
Change existing projects	It is possible to change an existing project using the functions and features of APM II. The 'Draft' mode can be used to add or edit data. Once published, the WBS will be recalculated automatically (new or updated bid rates) and the forecast will be updated accordingly. The tab 'Budget' in the Advanced WBS will show the current budget vs the original budget.

2.2.52 New for release APM I 7.1.23014.50 for Dynamics 365 for Operations Update1

Currently under APM I license

ID	Title	Description
AXADM-47-1	Project Logistics	The project logistics form shows an overview of the complete multi-level project and its activities as well as the demand lines that are attached at all different levels. It also shows how these demand lines are covered via (planned) orders. This coverage can be direct, but it can also be indicated from master planning (anonymous orders), with direct insight and access to underlying details and planning recommendations. This provides insight to a project manager or project planner as to how the project and its underlying material flow is (to be) planned. The form has been re-designed to adhere to Dynamics 365 for Operations best practices and tooling.
AXADM-47-3	Project Inventory	Starting from the base of all available inventory, you can manage items for specific projects and sub-projects from master planning and availability through pricing and costing. This is enabled by adding a tracking dimension which value is auto-filled by the (sub-) project ID for relevant products.

AXADM-47-5	Quotation Statement	<p>The quotation statement provides the overview for the complete multi-level project structure and its activities from a pricing, revenue and margin perspective. At each level of the WBS you can get insight in the cost, revenue and resulting margin as total or per transaction type. He can also manage quotation specific pricing and margin directly from the quotation statement as well as simulate margins or mark-ups to optimize pricing. For fixed price projects on-accounts can be generated directly from the simulations.</p>
AXADM-47-6	Quotation Margins	<p>Prices can be determined to be quotation specific. This allows to build a quote that is priced optimally and reflect the one-off nature of the quote or of a part of it. Upon transferring the quotation to a project structure, the pricing is automatically applied to the (sub-) project. It is optional to use quotation specific prices and margins, if no quotation specific prices are set up standard D365 Ops price rules will apply.</p>

2.3 New functional topics considered for this release

No functional topics were considered in this release

2.4 New functional topics considered for previous releases

2.4.1 **New functional topics considered per release Advanced Project Management 10.0.25.43 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

2.4.2 **New functional topics considered per release Advanced Project Management 10.0.24.42 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

2.4.3 **New functional topics considered per release Advanced Project Management 10.0.24.41 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

2.4.4 **New functional topics considered per release Advanced Project Management 10.0.23.40 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

2.4.5 **New functional topics considered per release Advanced Project Management 10.0.22.39 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

2.4.6 **New functional topics considered per release Advanced Project Management 10.0.21.38 for Dynamics 365 for Operations 10.0**

Title	Description
Forecast quantity is minimum one on the projects too.	Forecast quantity is the major factor to calculate bid rate. If the forecast quantity is zero on the project quotation, then bid rate = Bid value/forecast quantity, and in this case, the bid rate is an impossible value. Hence it is already taken as one by default. This behaviour is not there till today for projects. It is introduced for projects too.

2.4.7 New functional topics considered per release Advanced Project Management 10.0.20.37 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.8 New functional topics considered per release Advanced Project Management 10.0.20.36 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.9 New functional topics considered per release Advanced Project Management 10.0.19.35 for Dynamics 365 for Operations 10.0

Title	Description
Cost code behaviour	<p>If cost code standard is set to Activity, same category + cost code combination is allowed. To show differences between different estimates, descriptions can be altered.</p> <p>If cost level is set to Transaction, then different cost codes are not allowed for same transaction type + Category combination.</p> <p>If different cost code is entered for a same category + cost code combination., user is notified with a warning, saying that “The cost code should be same for category and activity < number>”</p>

2.4.10 New functional topics considered per release Advanced Project Management 10.0.18.33 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.11 New functional topics considered per release Advanced Project Management 10.0.18.32 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.12 New functional topics considered per release Advanced Project Management 10.0.17.30 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.13 New functional topics considered per release Advanced Project Management 10.0.16.29 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.14 New functional topics considered per release Advanced Project Management 10.0.16.28 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.15 New functional topics considered per release Advanced Project Management 10.0.15.27 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.16 New functional topics considered per release Advanced Project Management 10.0.14.26 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.17 New functional topics considered per release Advanced Project Management 10.0.14.25 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.18 New functional topics considered per release Advanced Project Management 10.0.12.24 for Dynamics 365 for Operations 10.0

Title	Description
Round off total amounts	A new parameter was introduced in the advanced project management parameters to round off the total amounts for bid values, calculated value, cost value, subcontracted value etc., What you see as a rounded amount, cut to two decimal points will be stored in the database too.

2.4.19 New functional topics considered per release Advanced Project Management 10.0.12.21 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.20 New functional topics considered per release Advanced Project Management 10.0.11.19 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.21 New functional topics considered per release Advanced Project Management 10.0.10.18 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.22 New functional topics considered per release Advanced Project Management 10.0.10.17 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.23 New functional topics considered per release Advanced Project Management 10.0.8.15 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.24 New functional topics considered per release Advanced Project Management 10.0.8.14 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.25 New functional topics considered per release Advanced Project Management 10.0.7.13 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.26 New functional topics considered per release Advanced Project Management 10.0.6.12 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.27 New functional topics considered per release Advanced Project Management 10.0.6.11 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.28 New functional topics considered per release Advanced Project Management 10.0.5.10 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.29 New functional topics considered per release Advanced Project Management 10.0.4.9 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.30 New functional topics considered per release Advanced Project Management 10.0.4.8 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.31 New functional topics considered per release Advanced Project Management 10.0.3.7 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.32 New functional topics considered per release Advanced Project Management 10.0.3.6 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.33 New functional topics considered per release Advanced Project Management 10.0.2.5 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.34 New functional topics considered per release Advanced Project Management 10.0.0.4 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.35 New functional topics considered per release Advanced Project Management 10.0.0.3 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.36 New functional topics considered per release Advanced Project Management 10.0.0.2 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.37 New functional topics considered per release Advanced Project Management 10.0.0.1 for Dynamics 365 for Operations 10.0

No functional topics were considered in this release

2.4.38 New functional topics considered per release Advanced Project Management 81.3.7.1 for Dynamics 365 for Operations 8.1.3

No functional topics were considered in this release

2.4.39 New functional topics considered per release Advanced Project Management 81.3.6.1 for Dynamics 365 for Operations 8.1.3

No functional topics were considered in this release

2.4.40 New functional topics considered per release Advanced Project Management 81.2.1.4 for Dynamics 365 for Operations 8.1.2

No functional topics were considered in this release

2.4.41 New functional topics considered per for release Advanced Project Management 81.1.1.9 for Dynamics 365 for Operations 8.1.1

Title	Description
Use of roles for pricing	The roles are also part of the pricing tables in the project module. The concept of roles has not been aligned with the extended pricing features (like construction template) in APM II.

2.4.42 New functional topics considered per release Advanced Project Management 81.20.2.2 for Dynamics 365 for Operations 8.1

No functional topics were considered in this release

2.4.43 New functional topics considered per release Advanced Project Management 80.15.3.18 for Dynamics 365 for Operations 8.0

No functional topics were considered in this release.

2.4.44 New functional topics considered per release Advanced Project Management 80.15.2.12 for Dynamics 365 for Operations 8.0

No functional topics were considered in this release.

2.4.45 New functional topics considered per release Advanced Project Management 80.15.1.120 for Dynamics 365 for Operations 8.0

No functional topics were considered in this release.

2.4.46 New functional topics considered per release Advanced Project Management 1712.12.1.70 for Dynamics 365 for Operations 7.3 (Fall 2017)

No functional topics were considered in this release.

2.4.47 New functional topics considered per release Advanced Project Management 1707.8.3.21 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 update (1707)

No functional topics were considered in this release.

2.4.48 New functional topics considered per release Advanced Project Management 1707.8.2.20 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 update (1707)

No functional topics were considered in this release.

2.4.49 New functional topics considered per release Advanced Project Management 1707.8.1.10 for Dynamics 365 for Finance and Operations, Enterprise Edition, July 2017 update (1707)

No functional topics were considered in this release.

2.4.50 New functional topics considered per release Advanced Project Management 8.0.1611.103 for Dynamics 365 for Operations Update 3 (1611)

No functional topics were considered in this release.

2.4.51 New functional topics considered per release 7.1.23014.50

No functional topics were considered in this release.

Update 3 functional topics considered	Description as described by Microsoft	Result for Advanced Project Management on Update 3
WBS in projects and project quotations		Due to the use of JavaScript and the inability to change or add functionality to the used WBS in Dynamics 365 for Operations we decided to completely restructure and rebuild the WBS in an advanced WBS, while still allowing and aligning with the standard WBS. Please see what's new section for more details.
WBS draft publish		We decided to integrate / align with the draft / publish functionality.

2.5 Discontinued features for this release

No functional topics were discontinued in this release

2.6 Discontinued features for previous releases

2.6.1 Discontinued features per release Advanced Project Management 10.0.25.43 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.2 Discontinued features per release Advanced Project Management 10.0.24.42 for Dynamics 365 for Operations 10.0

ID	Title	Description
140374	CS00209315 Hide WBS Cost control items showing in the APM menu	Hide Create WBS journals, post and close -from the APM periodic menu., as they are no longer used.

2.6.3 Discontinued features per release Advanced Project Management 10.0.24.41 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.4 Discontinued features per release Advanced Project Management 10.0.23.40 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.5 Discontinued features per release Advanced Project Management 10.0.22.39 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.6 Discontinued features per release Advanced Project Management 10.0.21.38 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.7 Discontinued features per release Advanced Project Management 10.0.20.37 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.8 Discontinued features per release Advanced Project Management 10.0.20.36 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.9 Discontinued features per release Advanced Project Management 10.0.19.35 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.10 Discontinued features per release Advanced Project Management 10.0.18.33 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.11 Discontinued features per release Advanced Project Management 10.0.18.32 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.12 Discontinued features per release Advanced Project Management 10.0.17.30 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.13 Discontinued features per release Advanced Project Management 10.0.16.29 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.14 Discontinued features per release Advanced Project Management 10.0.16.28 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.15 Discontinued features per release Advanced Project Management 10.0.15.27 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.16 Discontinued features per release Advanced Project Management 10.0.14.26 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.17 Discontinued features per release Advanced Project Management 10.0.14.25 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.18 Discontinued features per release Advanced Project Management 10.0.12.24 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.19 Discontinued features per release Advanced Project Management 10.0.12.21 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.20 Discontinued features per release Advanced Project Management 10.0.11.19 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.21 Discontinued features per release Advanced Project Management 10.0.10.18 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.22 Discontinued features per release Advanced Project Management 10.0.10.17 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.23 Discontinued features per release Advanced Project Management 10.0.8.15 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.24 Discontinued features per release Advanced Project Management 10.0.8.14 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.25 Discontinued features per release Advanced Project Management 10.0.7.13 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.26 Discontinued features per release Advanced Project Management 10.0.6.12 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.27 Discontinued features per release Advanced Project Management 10.0.6.11 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.28 Discontinued features per release Advanced Project Management 10.0.5.10 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.29 Discontinued features per release Advanced Project Management 10.0.4.9 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.30 Discontinued features per release Advanced Project Management 10.0.4.8 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.31 Discontinued features per release Advanced Project Management 10.0.3.7 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.32 Discontinued features per release Advanced Project Management 10.0.3.6 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.33 Discontinued features per release Advanced Project Management 10.0.2.5 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.34 Discontinued features per release Advanced Project Management 10.0.0.4 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.35 Discontinued features per release Advanced Project Management 10.0.0.3 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.36 Discontinued features per release Advanced Project Management 10.0.0.2 for Dynamics 365 for Operations 10.0

No functional topics were discontinued in this release

2.6.37 Discontinued features per release Advanced Project Management 10.0.0.1 for Dynamics 365 for Operations 10.0

ID	Title	Description
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AXADM-108	Export of partial structure/sub project from standard WBS	It is no longer possible to export a partial structure of WBS from standard WBS form. It is still possible to export a partial structure of the WBS using the Advanced WBS form.
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2.6.38 Discontinued features per release Advanced Project Management 81.3.7.1 for Dynamics 365 for Operations 8.1.3

No functional topics were discontinued in this release

2.6.39 Discontinued features per release Advanced Project Management 81.3.6.1 for Dynamics 365 for Operations 8.1.3

No functional topics were discontinued in this release

2.6.40 Discontinued features per release Advanced Project Management 81.2.1.4 for Dynamics 365 for Operations 8.1.2

No functional topics were discontinued in this release

2.6.41 Discontinued features per release Advanced Project Management 81.1.1.9 for Dynamics 365 for Finance and Operations 8.1.1

No functional topics were discontinued in this release

2.6.42 Discontinued features per release Advanced Project Management 81.20.2.2 for Dynamics 365 for Finance and Operations 8.1

No functional topics were discontinued in this release

2.6.43 Discontinued features per release Advanced Project Management 80.15.3.18 for Dynamics 365 for Finance and Operations 8.0

No functional topics were discontinued in this release

2.6.44 Discontinued features per release Advanced Project Management 80.15.2.12 for Dynamics 365 for Finance and Operations 8.0

No functional topics were discontinued in this release

2.6.45 Discontinued features per release Advanced Project Management 80.15.1.120 for Dynamics 365 for Finance and Operations 8.0

ID	Title	Description
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AXADM-107	Create object structure from Project structure	It is no longer possible to create the Object hierarchy – as used in the AMS module – from the Project structure. In AX 2012 this feature was enabled for the scenario where the Project structure is a meaningful representation of a machine.
AXADM-130	Request for quotations for subcontracts	It is no longer possible to first create a request for quotation(s) before creating the actual subcontract.
AXADM-128	Project execution structure	It is no longer possible to create a different project project-execution structure parallel to the approved project quotation.
AXADM-129	Progress Bill rectifications and price revisions.	It is no longer possible to adjust the bid rates used in the progress bill, based on a formula (with indexes).
AXADM-30	Partial release of retentions	In AX 2012 it was enabled to partially release a retention amount. This was enabled using underlying API's from standard AX 2012 and as of R3 CU10 was built as a To-Increase proprietary solution. In review of the use of this feature in combination with the restrictions in using extended code only in D365 it has been decided to discontinue this feature for APM for D365.
AXADM-29-1	Project change order – workflow	Alignment with standard D365 workflow engine is not supported. The PCO lifecycle can be managed from the statuses that have been newly introduced in this release. Refer 2.1.1 for more information.
AXADM-29-2	Project change order - New project creation	If changes are to be encapsulated under new sub project, this must be done outside of the project change order. It is no longer possible to introduce the new sub project within the project change order.

AXADM-29-3	Project change order - Quotation Statement	Quotation statement is no longer supported for the change orders. Price and margin changes can only be maintained within the change order at estimate line level, not at the (sub-) project-level.
AXADM-29-4	Project change order - Create subcontracts from PCO	Creating subcontracts from PCO is no longer supported.

2.6.46 Discontinued features per release Advanced Project Management 1707.8.3.21 for Dynamics 365 for Finance and Operations, Enterprise Edition July 2017 Update (1707)

Import of non-template hierarchies in Project WBS

2.6.47 Discontinued features per release Advanced Project Management 1707.8.2.20 for Dynamics 365 for Finance and Operations, Enterprise Edition July 2017 Update (1707)

No functional topics were discontinued in this release.

2.6.48 Discontinued features per release Advanced Project Management 1707.8.1.10 for Dynamics 365 for Finance and Operations, Enterprise Edition July 2017 Update (1707)

No functional topics were discontinued in this release.

2.6.49 Discontinued features per release Advanced Project Management 7.3.1611.103 for Dynamics 365 for Operations Update 3 (1611)

No functional topics were discontinued in this release.

2.6.50 Discontinued features per release 7.1.23014.50

The function feature set for Advanced Project Management (APM) for Dynamics 365 for Finance and Operations Update 1 (currently under APM I license) is designed to be an upgrade from the feature set of Advanced Project Management I for AX 2012 R3 CU10. Due to technical and functional reasons, there are functions and features that are discontinued

ID	Title	Description
AXADM-47-2	Discontinue solution centre dependency	Solution centre is no longer a pre-requisite for Advanced Project Management. The capabilities provided by solution centre in AX 2012 will be embedded in the ADM and AEC modules separately.

AXADM-47-8	Discontinue estimate lines for parent activities	It is no longer possible to enter estimate lines for a parent activity. The summary - detail functionality covers the relevant business scenarios sufficiently.
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Fixes summary

2.7 Fixes for this release

ID	Title
145085	CS00219868 - Description for current forecasts not changed when modified using PCO and is transferred to project
137827	CS00198817 - Cost value for activity and sub project is in correct after change for a subcontract

2.8 Cumulative fixes from previous releases.

ID	Title
140255	CS00208979 - Quotation lines must be created with project date which is the activity start date.
142383	CS00212930 – Cost codes are now retained correctly after WBS export or template import.
138582	CS00203001 - when trying to change the allocated budget for the seventh month in the row, there was an error which is now fixed.
135006	CS00194092 - When selecting a project inventory ID from the dropdown, description is added.
135664	CS00196020 - Cost codes not visible in 'All forecast'. Cost code group and cost code are added.
138606	CS00199920 - Double amounts by WBS still exists after edit and publish. This is fixed.
137919	CS00199506 - Construction template is erased on the quotation WBS
137892	CS00199365 - Additional fields on the Opening balance journal templates
134247	CS00192786 - Upload of APM data is failing due to incomplete or missing data entities ProjProjectWBSDraftEntity - Project work breakdown structure – Draft ProjWBSActivityEstimatesEntity - Project work breakdown structure - Draft estimates ProjectsEntity – APM projects.

137937	CS00199509 - Import of journal lines with APM fields, ignores the APM price setup
137871	CS00199356 - Norwegian language doesn't show correct transaction type for Fee on Advanced WBS
131232	CS00187202 - Equipment journal does not fetch the cost code and the Equipment ID when opened in Excel from F&O.
133205	CS00190387 - Wrong sorting in Quotation statement
134161	CS00192294 Project contract ID is erased after template import
125664	CS00172474 - Distribution option in budget allocation supports distribute across multiple activities.
125584	<p>CS00172437 - Bug with budget allocations for new activities</p> <p>It is now possible to allocate budget for activities that have been added to an existing project Add next period : Add one extra month; Mark the period as special one. Distribute: Recreating the data, based on task start date & end date. Added periods/months based on task start date & end date. Distribute the remaining budget evenly to all the open periods</p>
125323	CS00172469 - Investment and cost projects are supported during transfer to project
129046	CS00181440 - Copy forecast radio button 'Include equipment' does not work. This was fixed along with delete forecasts for equipment transaction types.
130767	CS00181364: Estimates are not refreshed when the user traverses between multiple activities
124424	CS00164917 - Activities added with a PCO are not visible in the tracking view.
124425	CS00164939 - Item forecasts are shown incorrect after the quantity is changed to 0 in PCO
124426	CS00164944 - Wrong validation in PCO, cannot add a second estimate with same hour category
124444	CS00164970 - Cost price is not updated in the current forecast after making changes in the second PCO
123069	CS00159447 - Budget tab on Advanced WBS is showing wrong values for costs and revenue.
123027	CS00159360 - Missing privilege for project inventory
120201	CS00151613-Certified quantities equation in subcontract progress bill screen should update the progress percentage and uncertified quantities correctly.
121184	CS00154611: Added missing privileges for buttons on project logistics screen for multiple buttons.
114840	<p>CS00142983-Start and end dates on subcontract will now show correct information. Following are corrected as a part of this request.</p> <ol style="list-style-type: none"> 1. Start and end dates on the subcontract are copied from the corresponding activity.

	<p>2. Status shown as printed on the subcontract report. End date is added on the report. When activity dates are changed on the project using a change order, the associated subcontract dates can be altered to show correct dates by clicking Update quantity button on the subcontract.</p>
113349	<p>CS00141436-Several subcontract issues are dealt.</p> <ol style="list-style-type: none"> 1.Copy activity dates to subcontract upon creation. 2. Show correct activity dates in the subcontract report.
113373	<p>CS00141621-When the same activity is subcontracted more than once, user is now displayed a message that says, “This activity has already been (partially) subcontracted. Please note that the original forecast lines have been updated already with the forecast model from the APM parameters”</p>
113348	<p>CS00141421-It is not possible to create a Po prepayment when multiple activities belonging to different subprojects are subcontracted to the same vendor.</p>
110849	<p>CS00135462-Issue with validation in project change orders (PCO).</p>
111191	<p>CS00135844-Link for RFQ is broken in Project logistics.</p>
111377	<p>CS00125538-NEW: Error "Field "Transaction ID" must be filled in.</p>
109821	<p>CS00132456- Cost control doesn't show any information when we go to a project with posted transactions.</p>
104198	<p>CS00122784: PBM integration journal lines description has limitation of 60 symbols per line. Description field for activity/project will now accept up to 255 characters.</p>
103184	<p>CS00118179: Project inventory ID is not inherited to BOM line if you add a new line in the production order BOM lines.</p>
101641	<p>CS00113993: Labels are missing for assign and remove project inventory ID on the project.</p>
101963	<p>CS00115364: We can add notes for an activity in standard D365 but not in APM.</p>
99012	<p>CS00105577: Project logistics doesn't show the Request for quotations when a planned order is converted into RFQ</p>
95617	<p>CS00098010: The tab 'Budget' in Advanced WBS shows 0 values if we start from a project</p>
97801	<p>CS00100980: Parameterize the item requirements checkbox and to mark it No by default in the quotation to project transfer wizard.</p>
100911	<p>CS00111976: Quotation cannot be processed if project group is blank in WBS</p>
101026	<p>CS00112835: Selecting a construction template for an item estimates removes the default cost/sales prices.</p>
95007	<p>In Platform updates for version 10.0.11 of F&O, MS has converted “field groups containing invalid field references “compile warnings into compile errors. Click MS link which has complete details.</p> <p>APM 10.0.10.17/10.0.10.18 is a pre-requisite to uptake MS 10.0.11 or higher version.</p>

99735	CS00108799: Advanced WBS is locked for editing after the quotation is rejected.
98239	CS00103875: Invoiced amounts are not visible in Advanced WBS, tab page 'invoiced & margins'.
94567	CS00095833- Hours posted from the timesheet doesn't show cost codes in the project posted transactions.
94816	CS00096084- Wrong validation against an exported WBS template while transferring project quotation to a project.
93484	CS00094497-Current APM version () is prerequisite for installing Microsoft D365 Ver. 10.0.9 and above.
93853	CS00094872-Data entity for uploading projects doesn't fill APM tables correctly; an extension code is required to subside errors that occurred due to change of logic for creating projects from data entities which is introduced by Microsoft.
94514	CS00095818-Vendor search not working for purchase RFQ with APM
94533	CS00095877-When item requirements are created manually from item forecasts or from the WBS, cost codes are not copied.
87482	CS00083788-User role; Project change order forms are assigned with privileges
87484	CS00083512-User roles (Integration option); Now Advanced WBS roles have privileges to use integration options of Bid import
86668	CS00080215-Error on project budget versions – revenue; Total budget has some discrepancy when budget revision is made without making any changes.
87726	CS00084163-Userrole Advanced WBS admin can't create and edit Subcontract; The privileges for Advanced WBS admin has been provided to create and edit subcontracts
92003	CS00089837 Wrong Project Statement calculation; Margin calculation based on equipment transactions only.
87384	CS00077517-Master planning by dimension project does not seem to be respected; Item coverage by project Id is not working with the combination of other tracking dimension(s). In the case of using the Project Dimension in combination with Batch or Serial dimension and coverage planning by Project Dimension the netting of supply and demand could be incorrect.
87571	CS00083955-We cannot process a project RFQ in combination with APM; Error encountered while clicking Edit RFQ button
87381	CS00079984-"Use advanced pricing"; When Use advanced pricing is turned off and the pricing priority is set to Standard setup, the sales prices in expense journal are not fetched properly
75103	TI-13333-H0R1- Multiple funding source; Error while generating progress bill per customer when the project contract has multiple funding sources and funding rules per activity
83949	CS00077288- when "Use advanced pricing" is marked in "Advanced project management parameters" Cost price (USD) Is not converting into Sales price (DKK) Currency

85678	CS00079022-Error transfer project quotation to project dkk issue. When transfer project quotation estimate line to project forecast, the currency that is use on Hour and expense is the company currency, not the customer currency.
80572	CS00073187 - Delivery address from project quotation is not copied to sub-projects; The delivery address from project quotation is not copied to sub projects after transferring it to project.
80942	CS00073750 - Not loading expense sales prices based of category; In expense journals, the sales price specified for the specific category is not loading.
80949	CS00073742 - "Transfer from WBS" on project - create too many forecast lines; Creating duplicate forecast lines while transferring from WBS for the second time to new forecast model.
81626	CS00074398 - Planned production doesn't inherit original production's inventory dim Project; The project inventory Id is not inherited in pegged orders.
77693	CS00069367 - Displaying wrong number of projects in quotation transfer wizard; During transfer to projects, number of projects is showing 1 irrespective of sub projects in the advanced WBS.
77687	CS00069353 - Not loading expense sales prices based of category; Expense journal is not fetching the right sales price for the expense.
75076	CS00061181 Project: When Transfer from WBS, wrong forecast model on a line; The forecast model is swapped while transferring the forecasts to the different model Id
75081	CS00061245-Progress bill deleting; Error while deleting the progress bill and subcontract progress bill.
75877	CS00062263 - Using Project Inventory and firming planned purchase orders; If the demand is created for items with Project inventory enabled, the group by vendor does not work as expected
76963	CS00068938 - Standard customer retention doubles on invoice posting; Till the invoice proposal creation, the retention amount is showing correctly, however posted transaction shows the retention amount doubled up
75906	CS00062320-Issue when creating a purchase order for a project Dynamics 365 for Finance and Operations; Error is thrown while saving the project purchase order line.
74347	Internal: <ol style="list-style-type: none"> 1. OnAccount estimate lines discrepancy: While importing WBS template. if both source quotation and WBS template has OnAccount line(s), sometimes extra OnAccount line gets imported with sales value zero. OnAccount lines are not allowed to be deleted directly from Standard work breakdown structure
73381	TI-13211-V4F8-Disappears Bid rate; When a new line(s) is/are added to project change orders, the system is deleting the bid rate and bid value of previous line.

73440	TI-13175-Y3Z6-A new line for project from Change order; If new tasks are added with the indented task in Project change orders, the leaf level tasks are gone.
73542	CS00059634-Ressource in adjust form; Resource field is blank in the Adjustment transactions page.
72873	TI-13140-S1F0-Bid import from Excel; Bid rates and values are missing after publishing the integration journal
72937	TI-13141-B1Z5-WBS Template; Lines are missing in imported project template.
73227	TI-13170-Z1Y3-Sorting of lines is not correct in Quotation statement; Sorting is not correct if nested sub projects exist
73382	TI-13212-Z6W8-Problem with function Run WBS Calculation; Exclamation mark appears on the selected activities which are not changed using PCO.
73218	TI-13202-G3B1-Sales quotation when send the quote is gone; Quotation is blank after Send quotation is competed.
73380	TI-13206-G6Y6-Use progress billing is set to No; While importing the WBS template, use progress billing is set to No even though the global parameter setting is set to Yes.
73427	TI-13219-L9L5-Project quotation - workflow error; The import template imports immediate first level siblings. This happens only in the combination of D365 10.0 PU25 and APM 10.0.0.1 PU24
71409	TI-12918-G7C4-Transferring Multiple Quotes to a project: While transferring multiple quotes to a project, forecast lines are duplicated.
69950	TI-12698-Q0B6-Project Inventory, creating purchase order: Master planning regenerates the planned purchase order even though the planned purchase order is firmed.
67889	TI-12415-W4W1-Commodity code in field sales category on project quotation: The commodity code field is removed in the sales category dropdown at estimate lines.
67086	TI-12249-C2P2-Project logistics error – Wrong ref: The Planned production order hyperlink is pointing to different order number.
61930	TI-11660-C3C6 – Rename Project/Advanced WBS: When renaming a Project Id in the project, the PbmWBSHeader table is not updated with the new Id
62990	TI-10740-C2M2 – Project cannot be added on Item coverage: Error while saving the record when trying to add a minimum quantity to the item coverage
62992	TI-10946-N3Y6 – Copy Project: Header record not found while creating the sub project using copy project
62993	TI-11029-W9C2 – WBS is not populated when a quotation is created from project: WBS is gone when creating quotation from the sub project
57878	TI-11224-R7K1- Task still deleted when pressing cancel in WBS.
59834	TI-11429-P8X1 - Reservation with Project Dim

53107	TI-10526-D8Z4 - Importing quotation template assigns different contract IDs to different Subprojects and giving errors when changed
53108	TI-10523-S4X8-50877- Fix from Microsoft for sales currency in project quotations have been applied for Advanced WBS
53111	TI-10566-R8Y9 - Calculation of margin / mark up in Simulation not correct for Expenses.
53118	TI-10440-Z4B0 - WBS error – Project types not copied correctly from template in Advanced WBS.
53119	TI-10496-V2F3 - Change of project type on the root node not possible in Advanced WBS.
33121	Filter on Procurement category does not consider child categories
35154	Project inventory ID is not populated automatically on item requirement.
38660	Implement Internal progress number sequence
44033	Removed Hot fix "Zero retention for progress bill" from current release (Hotfix-TI-09078-Q2H2)
45266	Hotfix-TI-09398-Y4D8-42229: Equipment depreciation amount signs are non-standard
45267	Hotfix-TI-09087-S4F0-23584: Depreciation posting on object project - posting issues
45274	Hotfix-TI-09319-P5G1-39696: Unit sales price on Item estimate lines when using a Price Unit value
46772	Hotfix TI-09871-K7L2 - WBS project wrong place
46576	TI-09871-K7L2 - WBS project wrong place
49027	TI-10312-Z9C1 - Sales quotation total – error (message is not clear)
48139	TI-10186-C7Y8 - Import template no sales value on quotation
49002	TI-10310-Y8W0 - Sales quotation when send the quote is gone:
48887	TI-10258-X8S4 - WBS - mark-up
49929	Subcontract does not get colour
49928	Invoice and margins tab - columns should be empty
49927	Budget tab – Column should be 0
49926	Progress and earned value tab – columns should be empty & no subcontract
49925	Tasks and estimates tab - Start dates are not filled during import
49924	When using templates, Advanced WBS fails
48332	Advanced WBS is not copied

35258	Pricing for equipment combined with category is being supported
51001	TI-10526-D8Z4 - Importing quotation template assigns different contract IDs to different Subprojects and error when changed
50906	TI-10524-X6F8 - requested ship date on project quotation
50877	TI-10523-S4X8-50877- Currency conversion in adv. WBS
50037	TI-10442-M3L0 - Change project type on project – whole hierarchy is changing
51002	TI-10527-Z9B2 – On account transactions created when quotation template is imported
51265	TI-10566-R8Y9 - Calculation of margin / mark up in Simulation not correct for Expenses.
51616	TI-10567-M9V1- In project quotation on the WBS on- account is not updated and deleted
51628	TI-10568-H9K1 Show the calculation as in the info on the Field Bid value (EUR)
52232	TI-10650-W8C4 Error while posting movement in Released products - Quantity adjustment
52233	TI-10647-M3B4 Error while posting Purchase invoice
49836	TI-10421-P0V8 - WBS BIG project hierarchy project wrong place.
49839	TI-10417-X8T0 - WBS error – different project contract.
49881	TI-10439-G7H8 - WBS – Change project group on project quotation.
49971	TI-10440-Z4B0 - WBS template change project type
50798	TI-10496-V2F3 - Cannot change project type on header project
50821	TI-10508-R2Q0 - Sales quotation disappears

3. Known Issues

3.1 Known issues for this release

No issues reported for this release.

3.2 Known issues from previous releases.

ID	Title
AX-ADM-105845	<p>When a purchase order associated with a project is confirmed, you will see an error that "Conversion between %1 and %2 does not exist" when the Purch unit & sales unit are different.</p> <p>We see the same issue when we try to activate any subcontract.</p> <p>Microsoft is on the job to fix this issue. via KB4580526.</p> <p>Follow the Yammer thread on the same subject here.</p>
AX-ADM-62229	<p>After publishing the root project node, there may be inconsistency in the WBS ID's. This can only happen when the activities are attached directly to the root node and there are sub-projects.</p>
AXADM-45275	<p>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.</p>