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Advanced Project Management 10.0.31.51 for Dynamics 365 for Finance and Operations 10.0

Release Notes

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Document Information

Title	Advanced Project Management 10.0.31.51 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	2/22/2023
Status	Final

1.   General

1.1   Purpose

This document describes the new functionality developed for Advanced Project Management 10.0.31.51 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	51	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 10.0.31.51 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 10.0.28	Platform Update 52 or higher	

Important update:

If any customer plans to update to any build later than 10.0.31 for APM, you must uptake this latest release delivered on the top of 10.0.30 initially to get rid of any compilation errors.

#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 • Sub-projects in Quote WBS • WBS template	APM I	
Advanced WBS • Summary / Detail • Quantities and units • Progress & Earned value	APM II	

• Budget and budget allocation • Subcontracting • Progress billing • Equipment transactions • 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.

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.

2. New features

2.1 Common features

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

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

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

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

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

?

To-Increase would love your feedback!

Please rate your experience in using the All solutions screen.

◯ 5 - Excellent

◯ 4

◯ 3

◯ 2

◯ 1 - Poor

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

Thank you for providing us feedback!

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

Submit   Cancel

2.2   New for this release

Title	Description
Project Logistics button is introduced in Advanced WBS	**Add project logistics button to the progress and earned value tab in projects.** The Project Logistics button is introduced under Progress and earned values in Advance WBS for Projects. This will reduce the effort of traversing to Project Logistics through APM. Note: This will appear only when committed cost is present. i.e., PO is available for project.

2.3 New for previous releases

2.3.1 New for Advanced Project Management 10.0.30.50 for Dynamics 365 for Operations 10.0

Title	Description
New button is introduced in APM Parameters to inherit the parent project financial dimension.	use project financial dimension from the parent project New master button for fields is introduced to set default value of use project financial dimension from the parent project.

2.4 New functional topics considered for this release

No functional topics were considered in this release

2.5 New functional topics considered for previous releases

2.5.1 New functional topics considered per release Advanced Project Management 10.0.30.50 for Dynamics 365 for Operations 10.0

Title	Description
Create subcontract progress bills from projects directly	Now you can directly create Subcontract progress bill from project page only instead of traversing from PMA→progress bills→progress bill→Subcontract progress bill→New. This will reduce the time and effort for traversing.

2.6 Discontinued features for this release

No functional topics were discontinued in this release

Fixes summary

2.7 Fixes for this release

ID	Title
162511	CS00223662 | Import template in Advanced WBS (quote) ignores the project setup When we import a template in WBS the root project used to get Project Group from Default Project type from APM Parameters and not from Imported template. Now this is addressed and when we import the template the root project will get the project type which is given in template.
161751	CS00223475 | Cost code missing from adjusted posted transactions. When we adjust a fee or expense in "posted project transactions" cost code is missing on of the adjustment lines. This is addressed and the Cost codes are now getting visible for adjusted transactions as well.
163311	Calculations group visibility in PCO when it is off in project. The Calculations groups were getting displayed while creating Task in Advance WBS at PCO, though the show WBS units is checked to OFF. Now this has been addressed and the calculation group will not be displayed when show wbs units is set to OFF.
162353	CS00223637 | Effort in hours incorrect The Effort in hours is getting doubled every time when refreshed. This is occurring only when the task and estimates are created to root node. Now this has been addressed and the effort in hours is getting displayed without error even when it is refreshed. This is related to know issue AX-ADM-62229, this is now fixed.

3.   Known Issues

3.1   Known issues for this release.

ID	Title	Remark
AX-ADM-62229	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.	This known issue is fixed in the current monthly release.

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.
AX-ADM-105845	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. We see the same issue when we try to activate any subcontract. Microsoft is on the job to fix this issue. via KB4580526. Follow the Yammer thread on the same subject here.
AX-ADM-62229	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.
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.