Release Notes for Business Integration Solutions 10.0.40.62 for Microsoft Dynamics 365 Finance and Operations

Release Notes

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Title	Release Notes for Business Integration Solutions 10.0.40.62 for Microsoft Dynamics 365 Finance and Operations
Subtitle (Subject)	Release Notes
Solution Suite	BIS; Connectivity, EDI, and MDM
Category	Release Notes
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Comments	

1. Business Integration Solutions

1.1 General

1.1.1 Purpose

This document describes the new releases of To-Increase Business Integration Solutions for Microsoft Dynamics 365 for Operations. Please read this document carefully before installing it. If you are interested in the practical how-to information, we provide on the To-Increase blog, you can follow the links we provide in some sections of the document. You find our blog at www.to-increase.com/blog/.

1.1.2 Audience

The document audiences are consultants and customer end-users.

1.1.3 Installation Notes

To install 'Business Integration Solutions' you need a valid license key. The following licenses are available:

- Business Integration Solutions
- Connectivity
- EDI
- MDM Master data management

1.1.4 Delivered models

Models are no longer delivered via LCS. If you still need the code, please reach out to our support team.

1.1.5 Software Requirements

Business Integration Solutions components are released on the following kernel build. This means that this version installs on Update 10.0.30 and higher.

Version	Kernel build	Application version
Microsoft Dynamics 365 for Operations – Update 54	10.0.30.0	7.0.6592.33

1.1.6 Product release information

Business Integration Solutions 10.0.40.62 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.30. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version 10.0.30 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.39, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.

Release date Business Integration Solutions	Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
12/04/2024	10.0.39.60	10.0.30	10.0.39	10.0.30 and above
06/06/2024	10.0.39.61	10.0.30	10.0.39	10.0.30 and above
02/07/2024	10.0.40.62	10.0.30	10.0.40	10.0.30 and above

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

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

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : Knowledge Base - Support - STEADEAN

1.1.7 Documentation

Help documentation for Business Integration Solutions is available at Connectivity studio (to-increase.com).

1.1.8 Support

In case of any question or query, please reach out to your Microsoft Partner or To-Increase directly. You can contact To-Increase via our support portal (https://support.to-increase.com/ticsm), or send an email to customeroperations@to-increase.com

1.1.9 Labels

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

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

The next label files are part of this release:

BIS.en-us.label.txt
BIS.da.label.txt
~~BIS.de.label.txt~~ (This translation is removed because of too many incorrect translations).
BIS.es.label.txt
BIS.fr.label.txt
BIS.it.label.txt
BIS.nb-NO.label.txt
BIS.nl.label.txt
BIS.pt-PT.label.txt
BIS.sv.label.txt

Excluded from our translations:

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

1.1.10 Common features

If multiple solutions provided by the To-Increase are used, always pick the latest version of the Common library.
The Common library version included in the current release is 1.0.0.57.

1.1.11 SHA256 algorithm for licenses

You may have already been informed by Microsoft, that licenses that are generated using the SHA1 algorithm will no longer be supported starting at Microsoft Dynamics 365's F&SCM version 10.0.39. This update will be generally made available by Microsoft on March 15th 2024.

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

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

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

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

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

1.2 Build changes

No changes.

1.3 Fixes/Changes

- Custom views for 856/DESADV outbound EDI messages – To support EDI 856 outbound message with additional information from load custom views were created:
    - BisEdiHelperWHSLoadPackingSlipJourQtyView
    - BisEdiHelperWHSLoadPackingSlipJourView
    - BisEdiWHSLoadPackingSlipJourQtyView
    - BisEdiWHSLoadPackingSlipJourView
- Missing relation between BisEdiStagingTableValidation and BisEdiJournalValdation – The method was added to allow extension implementation on the tables. A new method could be used to add custom code to fill and correct extension fields during the insert.
- Cost price in Sales orders not filled when orders are imported from EDI to BIS – The method editCalculateCostPrice was added to the BisSalesLine entity. This is the edit method that could be used in the field mapping. The input of the edit method is a date. The cost price is calculated based on this date. If no data is used, the current date is applied.
- The special Danish characters are not coming as values during the XML import to EDI – The encoding from the document setup was applied to be used during the file reading.
- File explorer path length and filter length – The explorer path was extended to the maximum available 260 symbols. The filter length was extended to 255 symbols.
- Long runtime when exporting data to Database – The number of pages was calculated based on the target document instead of the source. As a result, the process was executed as many times as records in the target.
- Issues with page split and with status update for medium seized message – The DMF is catching errors by itself and they are not showing in BIS. The error handling for the entities was improved to log the errors.

Internal

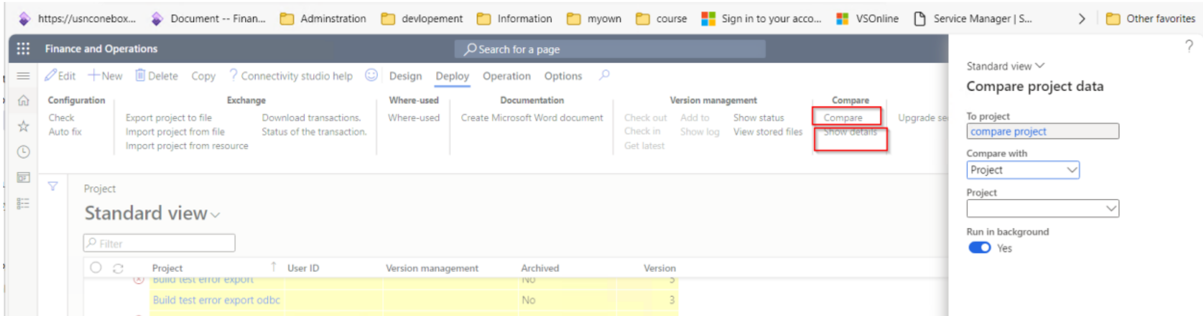
- Check option in the project is not giving any message - The successful message is displayed if no errors.
- The validation that a number of days is not zero was added to the history cleanup process.
- Initialize master data is creating master data for newly created records when executing through staging – If the staging message exists, the key fields from the staging target document should be applied to identify the same records.
- Paging is not working if the given number is less than 59 for current company and it is 10 for source companies – The company range was not applied that resulted in the wrong number of pages.
- Delete functionality is not working when Direct export from d365 FO to SQL cloud database – Not only the key fields were used in the delete statement. As a result, the record to delete was not found.
- Service bus search definition improvements:
    - Made the search definition maintainable if started from a message
    - Made the option search definition only enabled if the source connector of the message is Service bus

- Added checks to the table to check if the message has the correct source connector and if the linked connector is service bus connector.
- Added the state icon to the navigation grid.

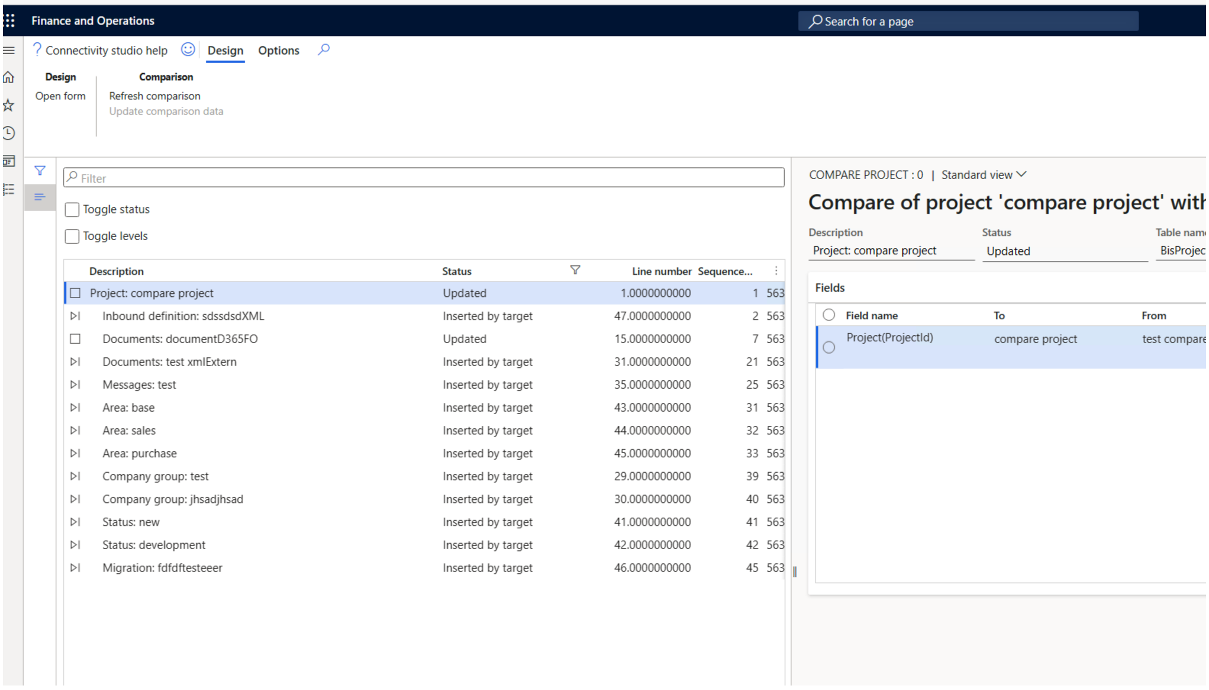
1.4 Functionality New and Changed

1.4.1 Project comparison

To be able to show the difference between two projects the following procedure can be used



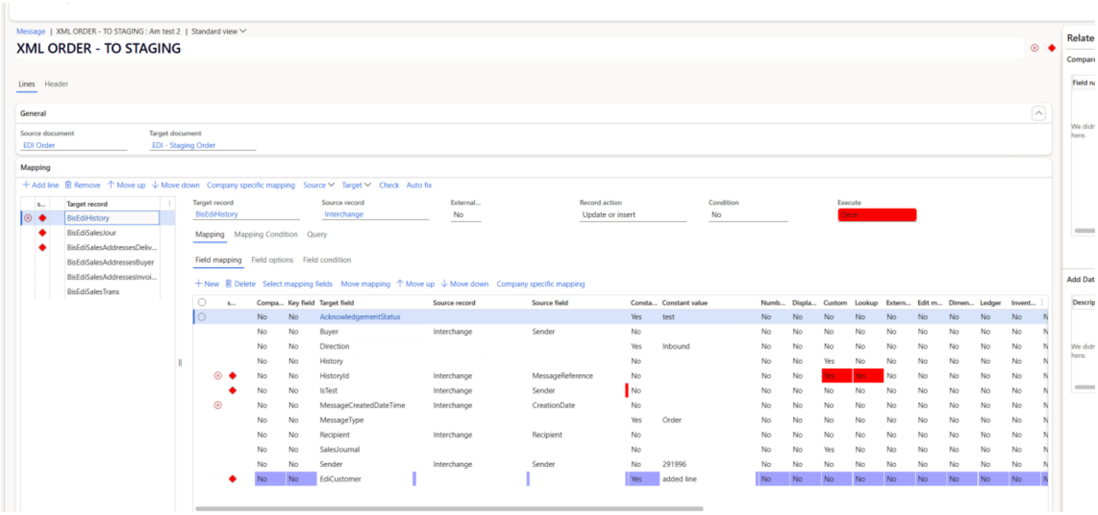
In this comparison, you can either select an existing project or version of the current project or a file. This will result in data that compares the source with the target project. Once the comparison is finished you can open the details with the option show details. This will open the next form



Default this form will only show the changes on levels 1 and 2. This means it will only show the changes of the project and the design components like connector, document message web service, etc. Is possible to show all data and show all levels.

To see the changes use the option open form. This will open the default form the root records, like document , connector and etc.

For example, this is the form that shows the changes in a message



Explanation:

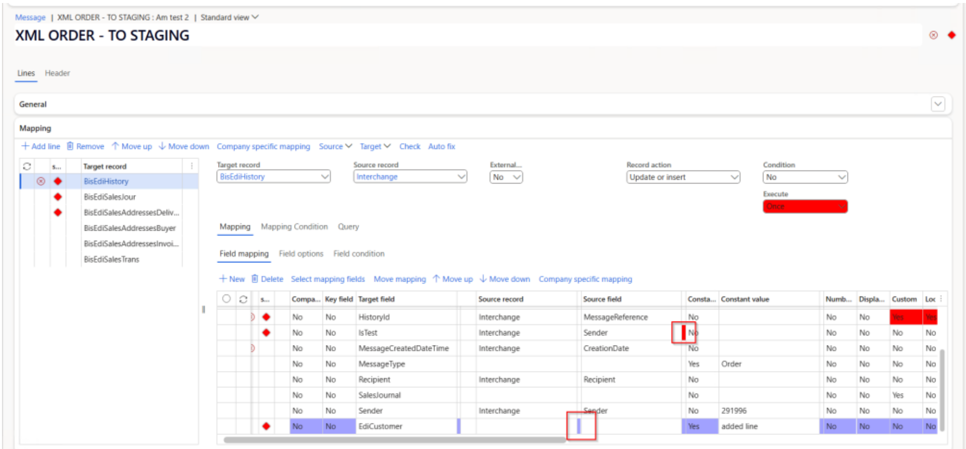
- Red: the field value is different
- Purple: the complete line is not present in the source but only present in the target.

Changes are reflected by the background color. However, there are two situations where the background color doesn’t work. This is an issue in D365FO form logic and couldn’t be solved.

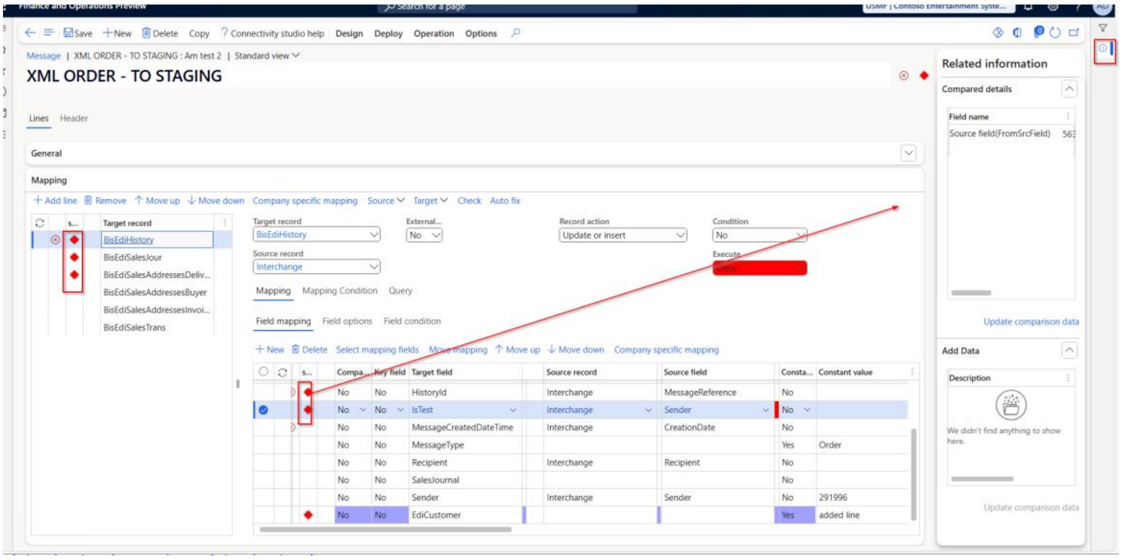
1. CheckBoxes; These are not able to change the background color. There the checkboxes are NOT shown as Checkbox but as ComboBox

Numb...	Displa...	Custom	Lookup	Extern...	Edit m...	Dimen...	Ledger	Invent...	Extern...	U
No	Yes	No	No	No	No	No	No	No	No	N
No	No	No	Yes	Yes	Yes	No	No	No	No	N
No	No	No	No	No	No	No	No	No	No	N

2. In the grid the fields which are show as reference group control are also not able to change the back ground color. An addition field is added to show that there is a change.



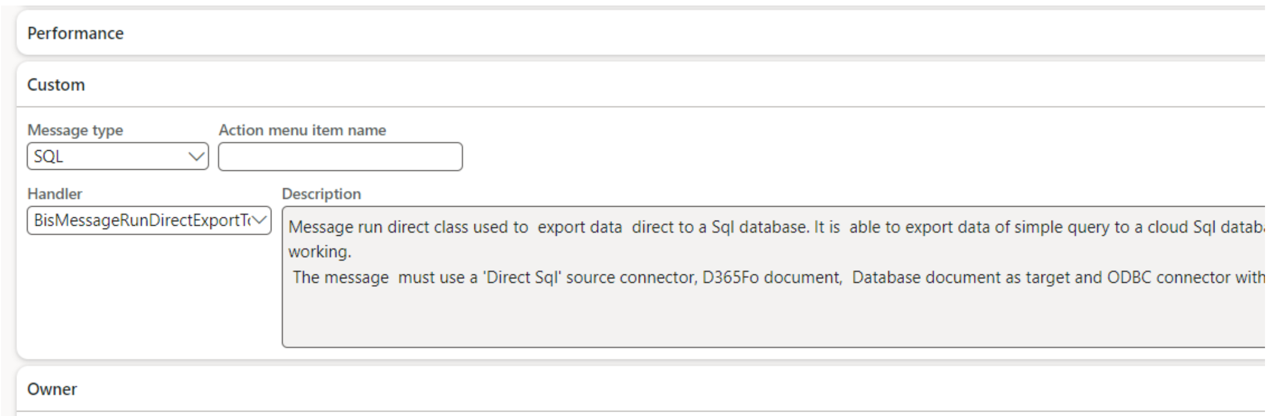
On the right, there is some additional information about the changes. The two form part shows the actual changes in the record and the bottom form part shows the records which are not present in the target but are present in the source. The ideal setup would be to show this information whenever a record is made active. This option doesn’t work in all cases. Therefore the active and enter events are not used to show the difference in the form part but the user needs to click on the wheel symbol () on the form.



1.4.2 Direct export to Cloud database (preview)

A new way of exporting data to a cloud database is introduced. The current export is selecting the database from D365Fo mapping it to the ODBC document and then use a SQL statement to update, insert the data into the target database. This work fine and is needed if D365FO logic is to be used. However in some cases the export to the cloud database is simple. Almost move of data from one D365Fo table to one target table. In this case the logic of D365FO is not really needed.
To use this new option define the D365Fo document and the target ODBC document as usual. Keep in mind both documents should be simple and should not have a complex structure. For the source connector select a connector of type 'Direct SQL' and the target connector a Database connector to a cloud database.

Create the message select the connectors and documents as usual and for the message set the type to "SQL" and use the message handler "BisMessageRunDirectExportToSql"



Now the message is setup to export data from D365Fo directly to a cloud database. The run of the message is the same as the other exports.

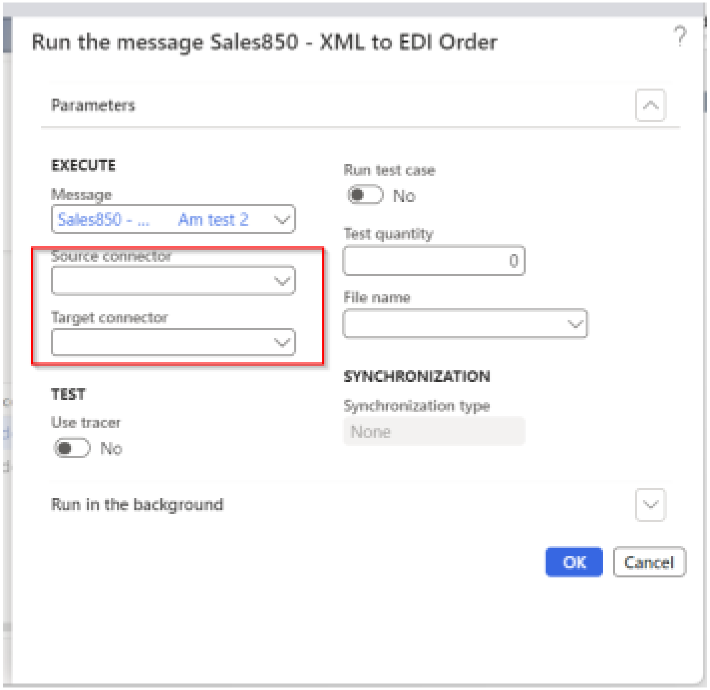
Internally the data is directly selected from the D365Fo database. It will create several SQL statements which are executed in the target database itself. It will use a bulk copy to copy the selected data to a temp table. This temp table is used to update, insert the target tables.

Restrictions:

- Most of the mapping options will NOT work. This is because the actual mapping is executed in the target database.
- Only simple source and target documents are supported. Complex queries may not work as expected.
- It only support export to Cloud Database. ‘Direct SQL’ connector can only be used as source and must be used with target cloud database connector
- Target database must support complex transaction and allow to create temp tables

1.4.3 Allow to set the source and target connector

In the run of the message it is possible to select the message and some run parameters. Due to this if the same message is needed to use an different connector it is not possible to do so. In this case either run the message with the use of the project tasks or create a duplicate message and change the connectors



If the connector is selected the message will run with the selected connector and will ignore the original connector linked to the message. There are some restrictions the selected connector must match with the original connector type. The rules are:

- Azure file storage. The selected should the same
- Direct SQL. The selected should be the same
- Staging. The selected should be the same
- Database. The selected should be the same
- D365 FO. The selected should be the same
- Upload and download, SharePoint, Azure Blob storage, service bus queue and webservice can be mixed.

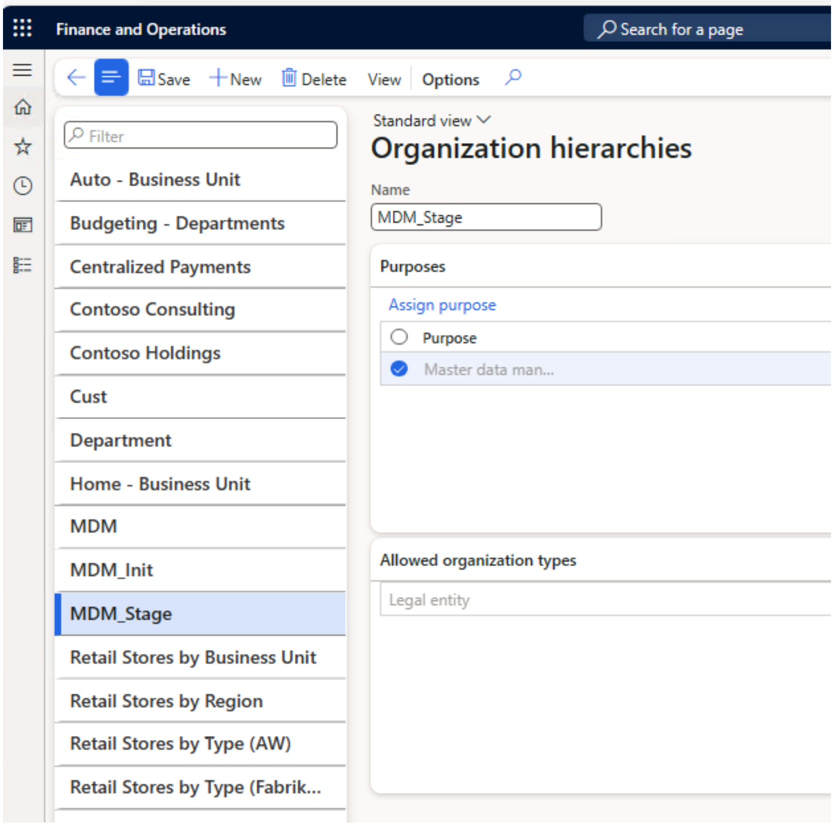
1.4.4 MDM Hierarchy

1.4.4.1 General

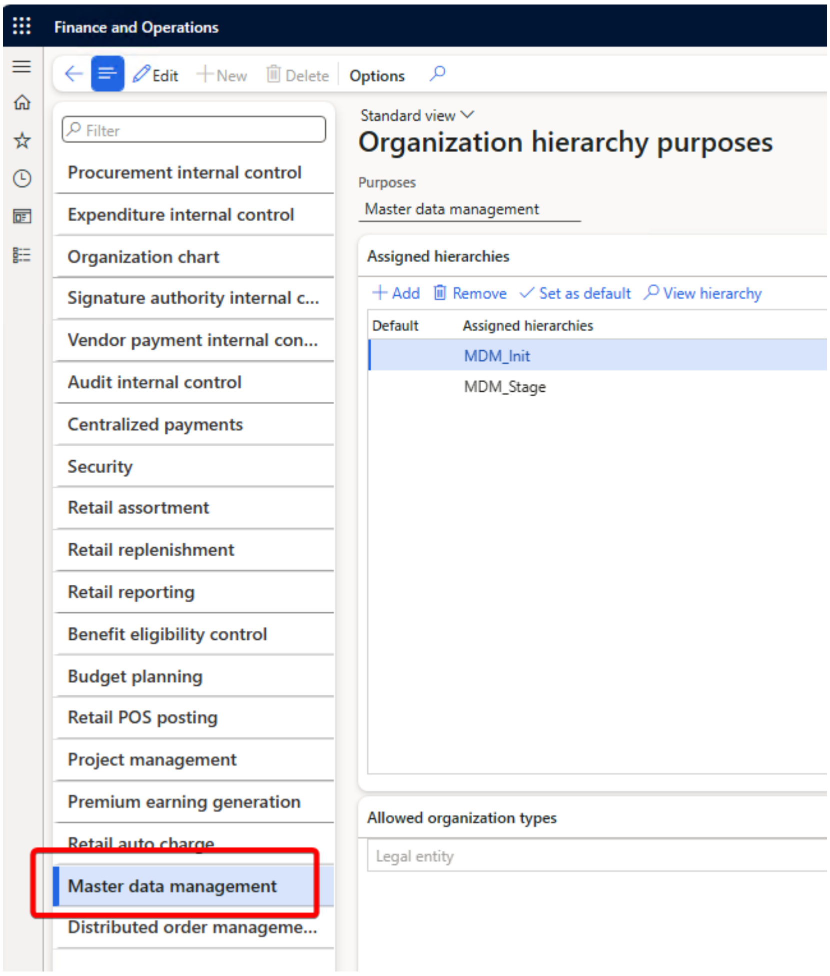
The MDM hierarchy is a new way of organizing data sharing using the masted data management. Hierarchy defines the source company and target companies.

1.4.4.2 Hierarchy setup

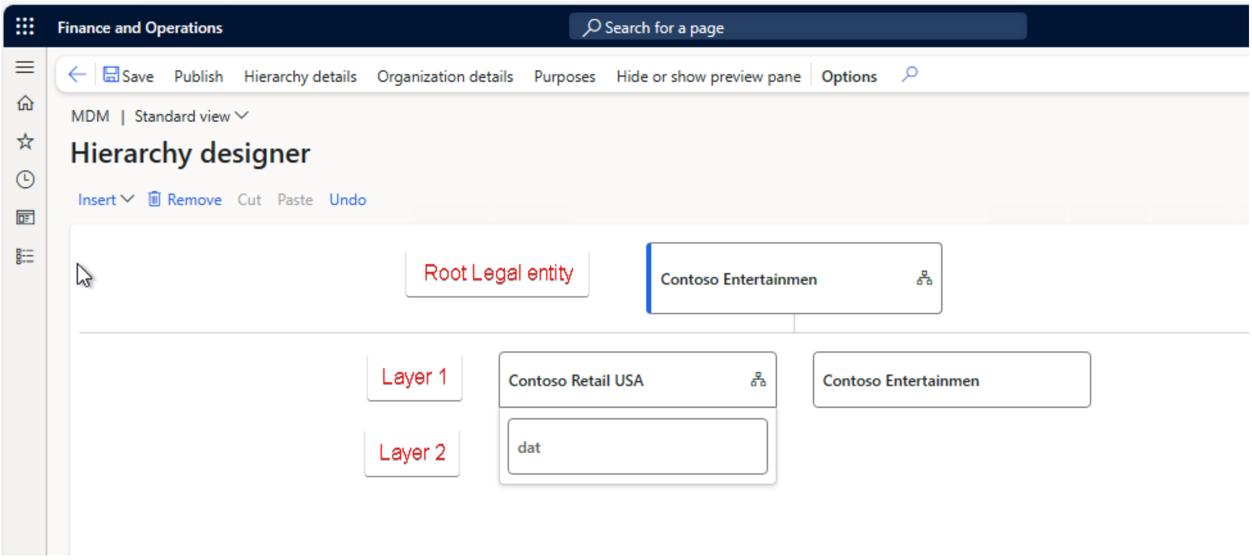
The standard organization hierarchy is going to be used. The form could be found in the Master data management > Setup > Organization hierarchies. The security for this form is not changed. MDM user should have a standard permission to have access to Organization hierarchy.



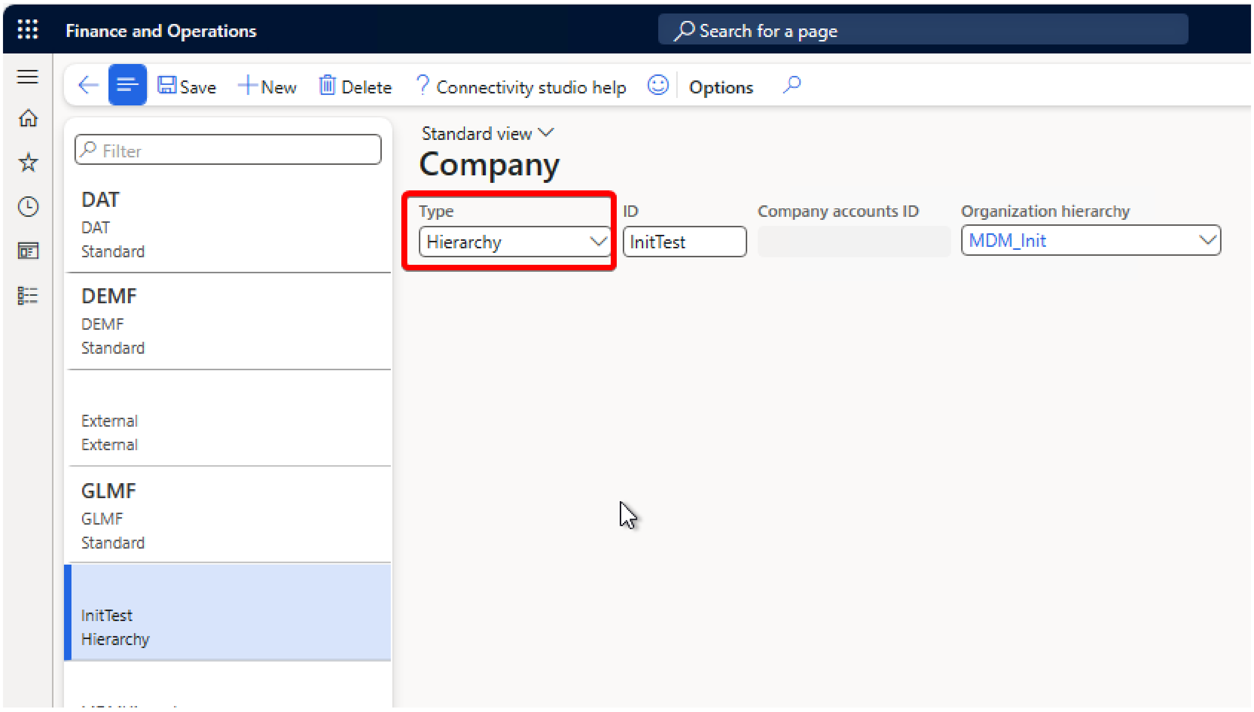
A new Organization hierarchy purpose is added. Only hierarchies that are assigned to this purpose could be used in MDM processes. Master data management purpose allows only Legal entities in hierarchy.



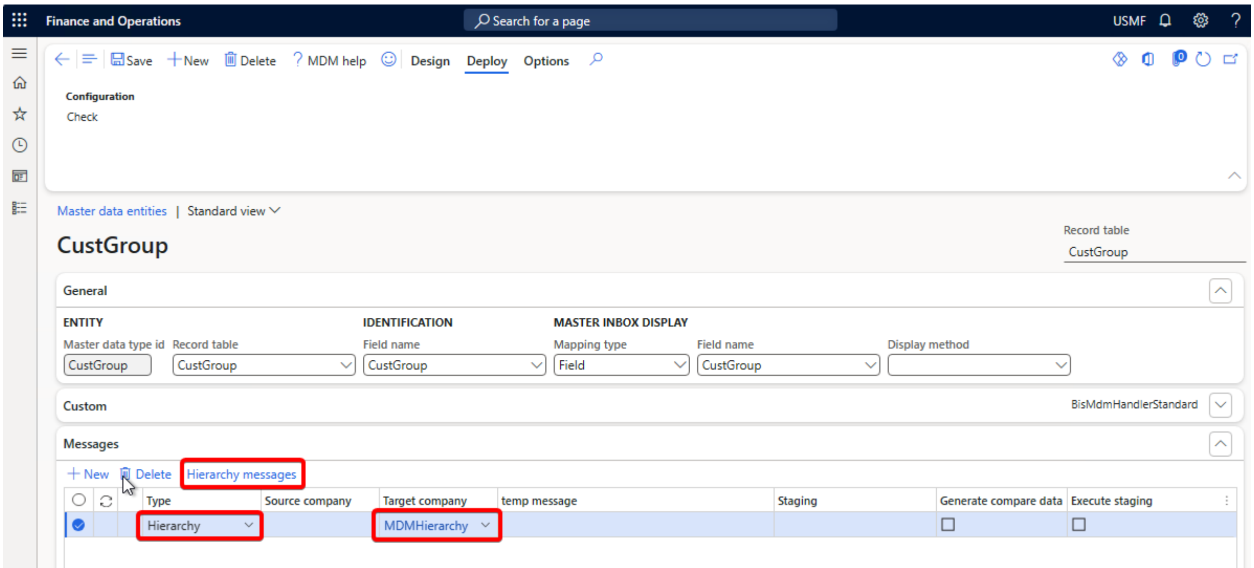
Organization hierarchy can have different layers and use different MDM messages for the layers.



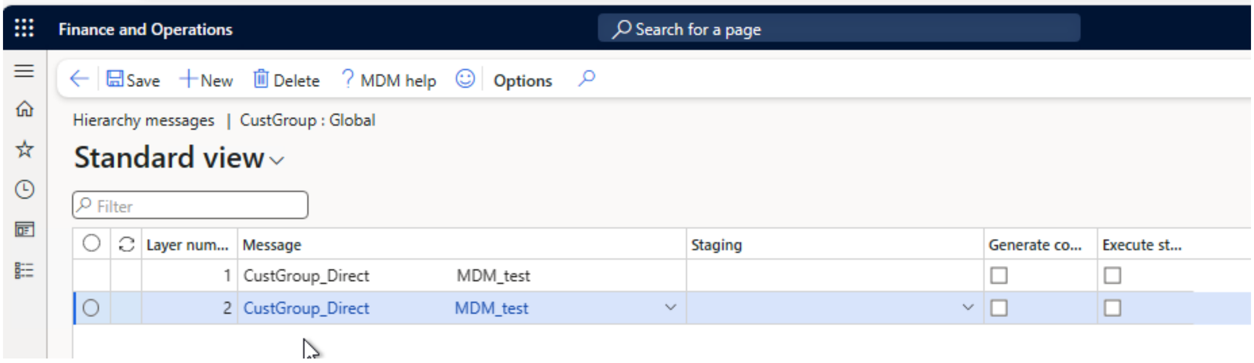
Since Organization hierarchies are date effective, the same functionality is applied to the MDM processes. The MDM processes are going to use the Legal entities that are active at the time of execution. Organization hierarchy needs to be assigned to the MDM hierarchy setup to be used. A new type 'Hierarchy' is added.



To assign the hierarchy to the master data entities, create a new record and select the Type as Hierarchy. Target company is the only editable field for this type. MDM hierarchy needs to be selected.

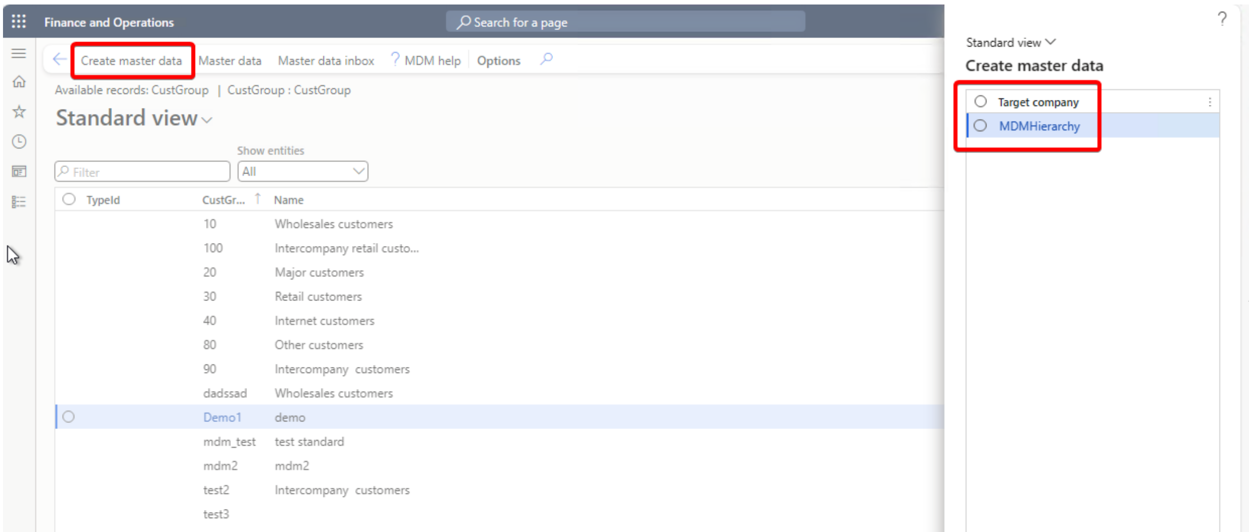


Go to the Hierarchy messages form to configure the messages for different layers.

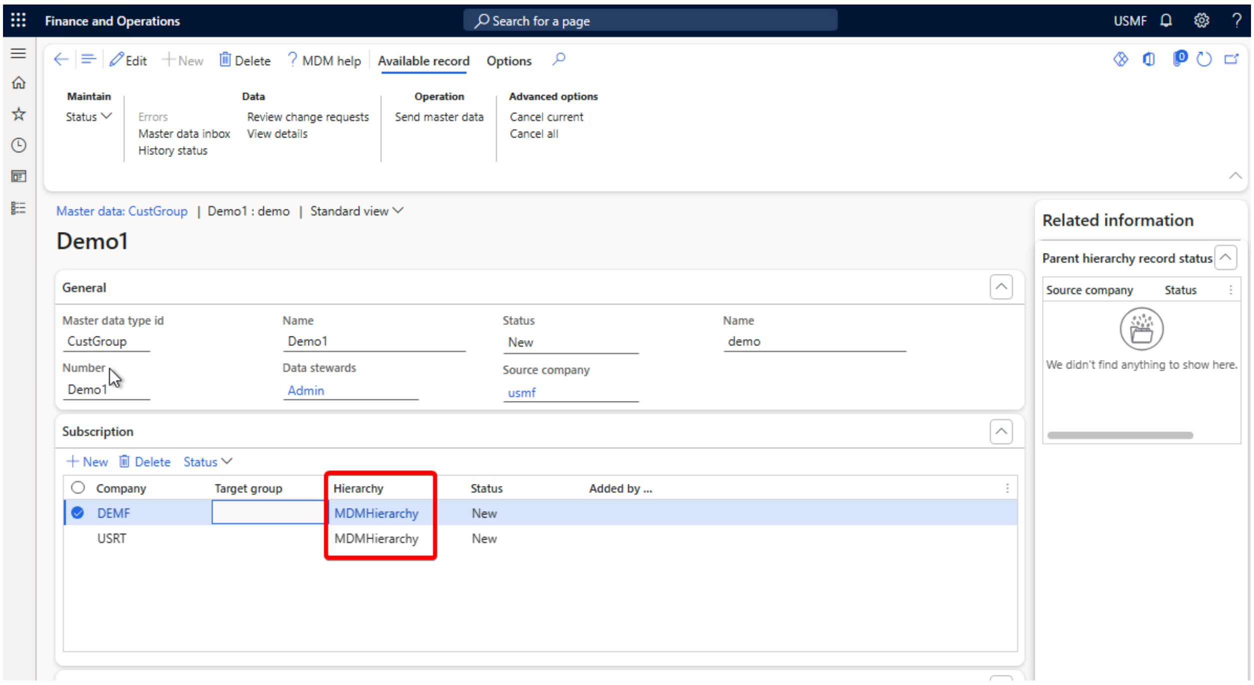


1.4.4.3 MDM push

The push process for the MDM hierarchy is similar to the process for MDM target group. Based on the Hierarchy setup, we are searching for all target companies for the current company. The master data and related company subscriptions are going to be created.

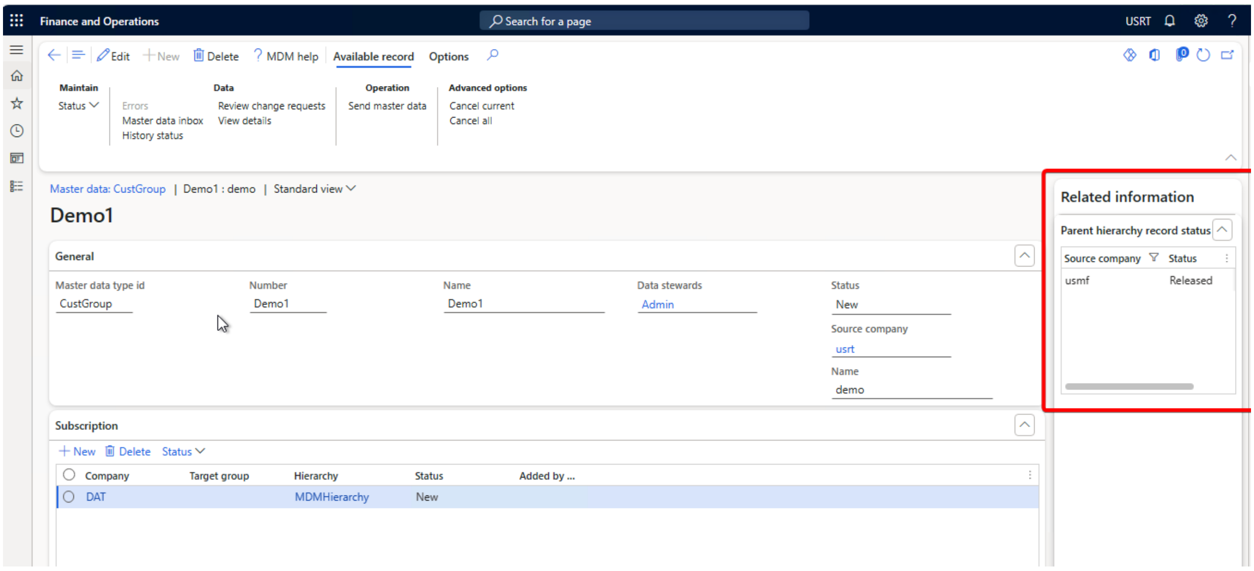


A new field Hierarchy was added to the subscription grid. It's not editable and shows the related hierarchy.



The processes of Approvement, Releasing and Sending Master Data were not changed.

A new Form part was added to the Master data form to show the record status in all parent companies from hierarchy.

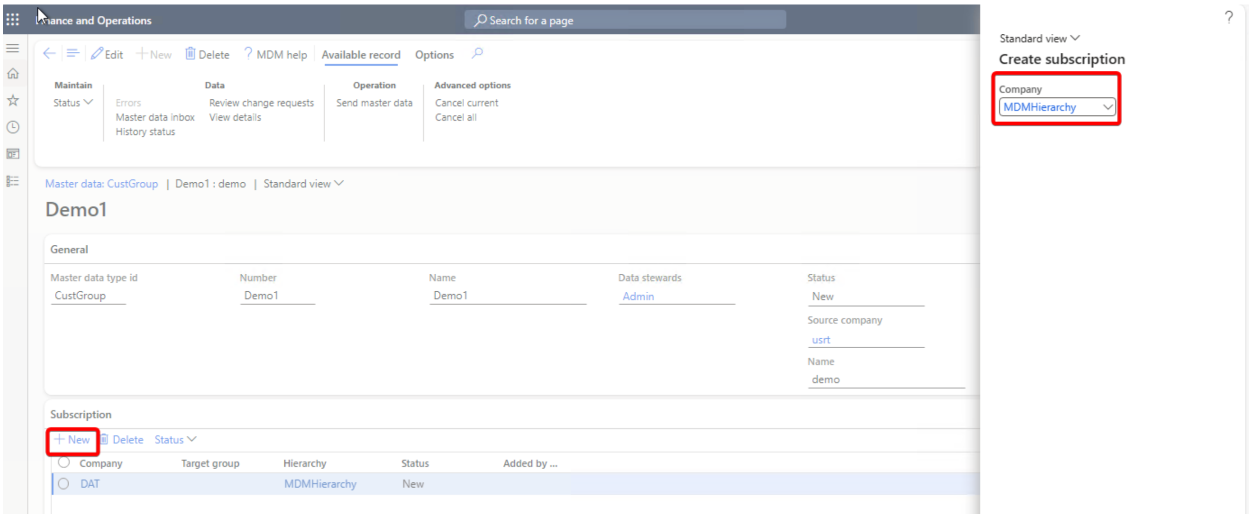


1.4.4.4 MDM Pull process

It’s possible to pull the record based on hierarchy as well. The source company is defined based on hierarchy where the current legal entity is the target.

1.4.4.5 Add subscription

Hierarchy is added to the Add subscription process as well. All child companies from the hierarchy is going to be added as subscriptions.

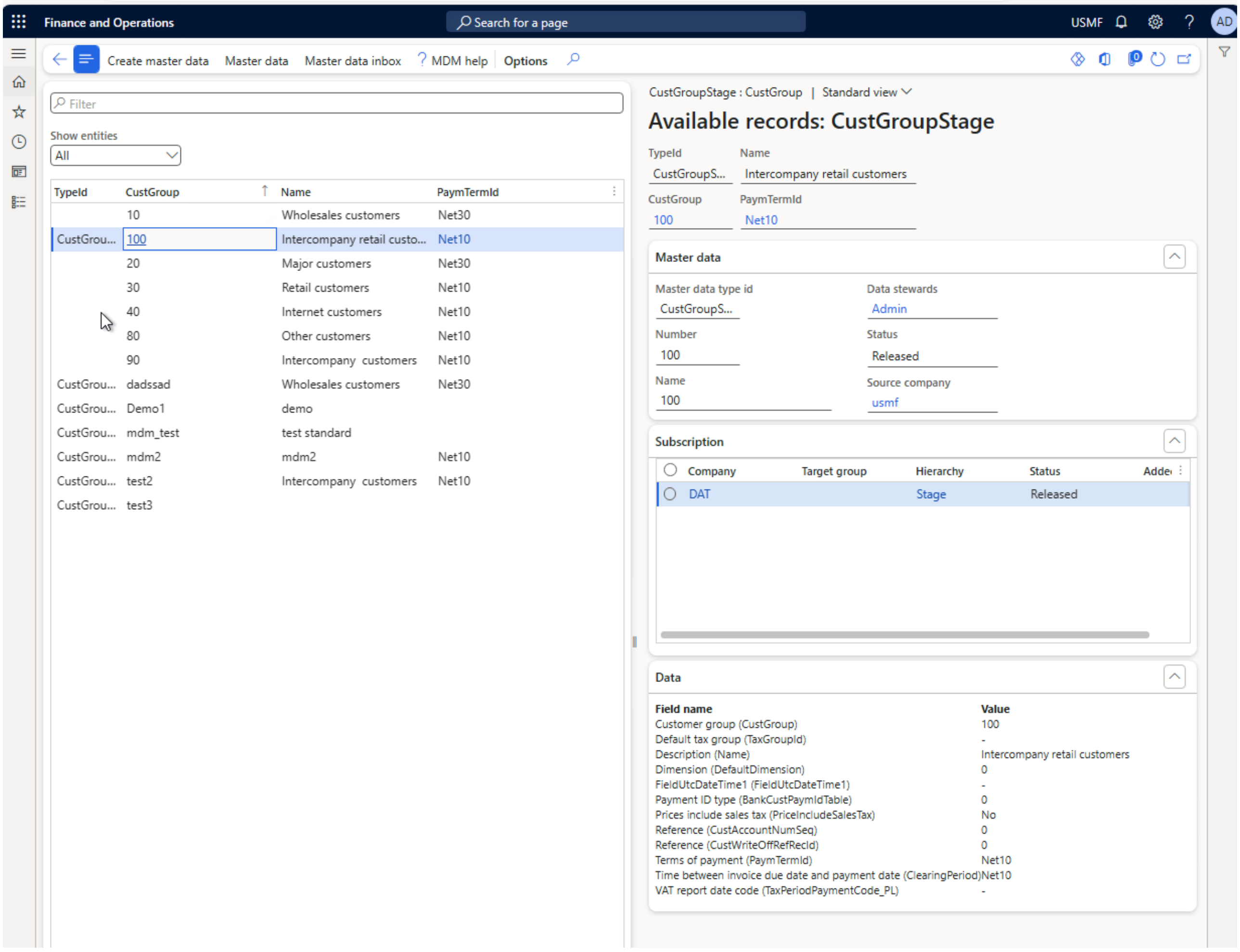


1.4.4.6 Initialize processes

Initialize master data and Initialize new company masted data could use MDM hierarchy too. In this case, initialize process is going to be called for all source-target pairs from hierarchy.

1.4.5 MDM Available records form design

A new design for the Available records form. Information from the master data form is shown directly.



1.4.6 EDI Library Wizard (Preview)

1.4.6.1 General

In the scope of the EDI Library portal implementation, we would like to introduce an EDI Library Wizard. The goal of the wizard is to import a message and create or update all main EDI setups in one go.

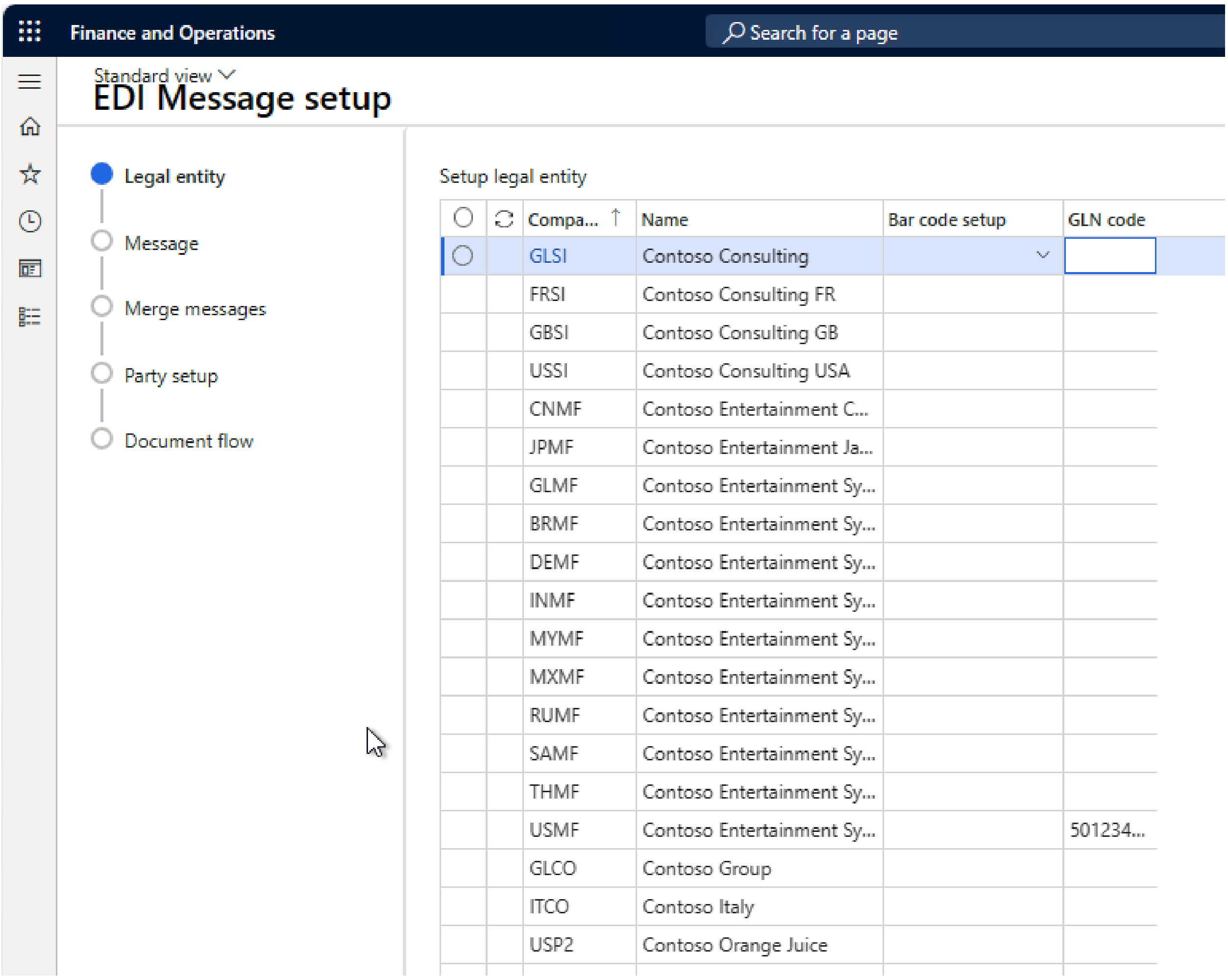
EDI portal is going to be released in the next releases. It would be possible to download template message file from the portal.

1.4.6.2 Import the template message

An EDI user can download the message from the portal and configure EDI using a new wizard.

The form is located in EDI > Setup > EDI Message setup

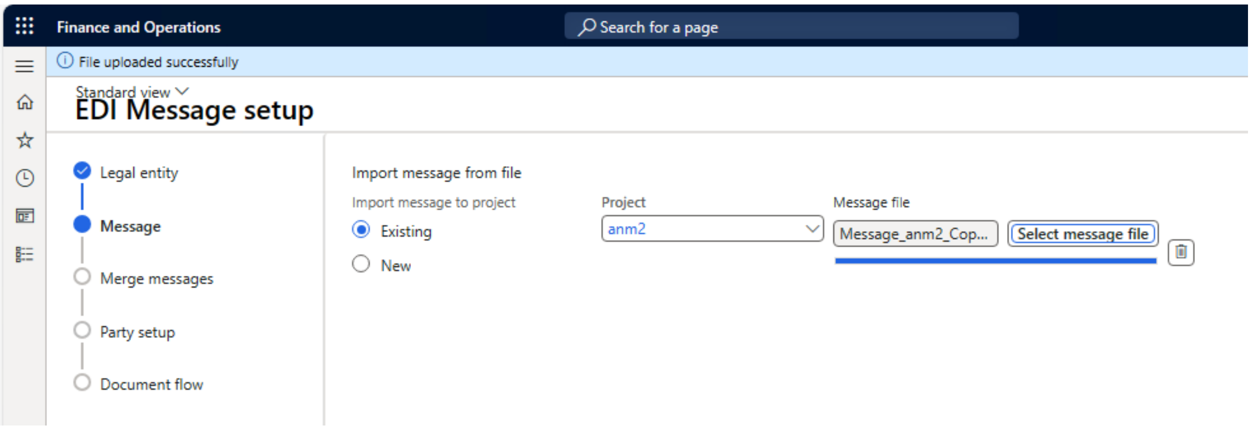
On the first screen, a user could configure the EDI setup for legal entities.



Important: Any changes on this or any other screen of the EDI Message setup are committed right away. Clicking Back, Cancel or closing the form won't revert the changes.

On the 'Message' screen, user can decide if the message should be imported into the new project or the existing one. The message file from the portal should be used as the input file.

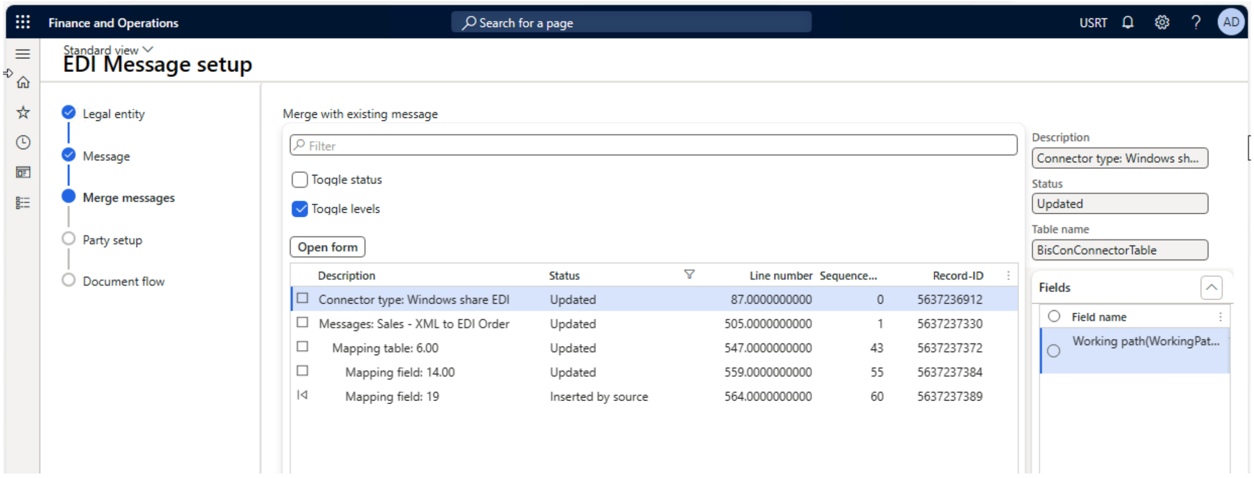
The Project field should be populated by a new project ID or selected from the lookup for existing project.



If the user is interested only in EDI setup and doesn't need to import the message, it's possible to keep the Project and Message file fields empty and click Next.

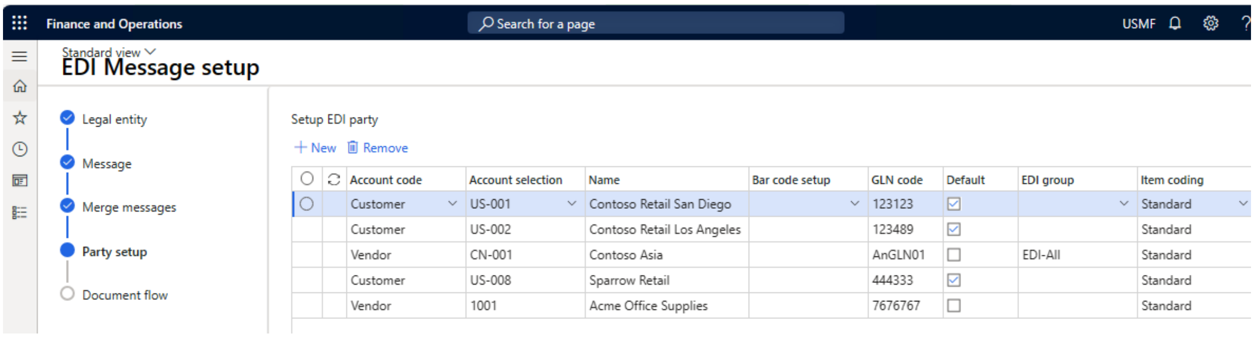
The 'Merge message' screen will be shown if the user imports the message into the existing project and the same message already exists there. In this case, the process might be time-consuming because existing data will be compared with the data from the file to show the difference. The view similar to the Comparison form will be shown.

The slow performance for generating the Merge message data is a known issue. This is about to be improved in the next releases.

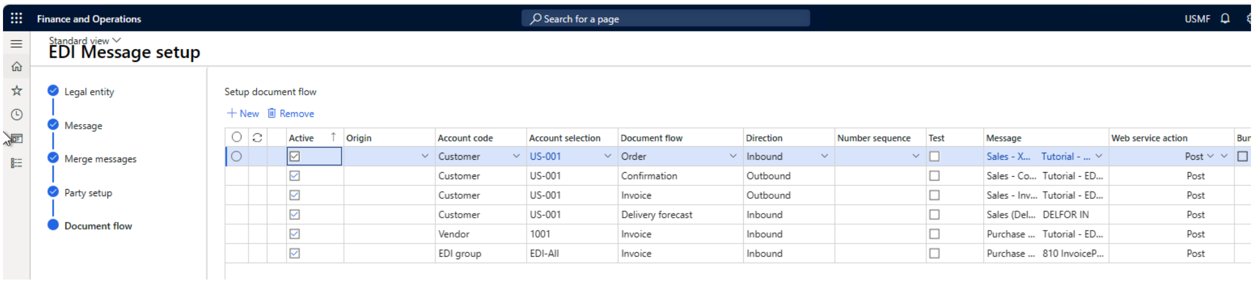


The user can open the related forms and make changes there by clicking the Open form button or a symbol on the grid. Importing changes is similar to the Comparison functionality.

On the ‘Party setup’ screen it’s possible to create a required EDI part configuration.



On the last screen, the user can configure the document flow for the EDI parties and Message that were created before or for any other.



1.5 Known issues

1.5.1 An issue with the form mapping recorder

When starting the recorder for the form mapping a fatal error can occur. This mainly happens if the message is opened via the workspace of BIS. If the message is opened via the BIS menu the error does not occur.

1.5.2 Feature management

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public previews and will be made generally available in future releases, in other cases, they are already generally available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled in the customer environment and any issues or questions related to new standard features and our solutions emerge, kindly contact us via To-Increase support.

1.5.3 Error on creating SQL triggers for data synchronization

In the 10.0.39 version the “SQL row version change tracking” feature is enabled by default. The feature creates a new field 'SysRowVersion' on all tables. This field should be excluded from the Connectivity studio message’s or web service’s synchronization triggers. It is not possible to use the 10.0.39 release with the Connectivity studio version older than 10.0.39.59.