Release Notes for Business Integration Solutions 10.0.41.63 for Microsoft Dynamics 365 Finance and Operations

Release Notes

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Title	Release Notes for Business Integration Solutions 10.0.41.63 for Microsoft Dynamics 365 Finance and Operations
Subtitle (Subject)	Release Notes
Solution Suite	BIS; Connectivity, EDI, and MDM
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1. Business Integration Solutions

1.1 General

1.1.1 Purpose

This document describes the new releases of STAEDEAN 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 STAEDEAN blog, you can follow the links we provide in some sections of the document. You find our blog at www.staedean.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 10.0.38 and higher.

Version	Kernel build	Application version
Microsoft Dynamics 365 for Operations – Update 62	10.0.38.0	7.0.7120.53

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 10.0.38. 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 10.0.38 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	Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
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
18/10/2024	10.0.41.63	10.0.38	10.0.41	10.0.38 and above

In case of an Error, STAEDEAN may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. STAEDEAN 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 validated 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 (staedean.com).

1.1.8 Support

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

1.1.9 Labels

STAEDEAN 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:

- STAEDEAN 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 STAEDEAN are used, always pick the latest version of the Common library. The Common library version included in the current release is 1.0.0.59.

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@staedean.com.

1.2 Build changes

No changes.

1.3 Fixes/Changes

- "Skip empty" for XML fields with an attribute. – The behaviour of the Skip empty was changed. The XML field will be skipped when the value does not exist. Even if the attribute is populated.
- "Allow change tracking" was enabled in almost all tables. Only temporary tables, lookup tables, etc. were excluded.
- History report generating error due to Excel cell size. – The error text will be cut if it exceeds 32767 characters.
- The data range for the synchronization does not run correctly from project or task. – The behaviour for the project or task execution was fixed to be the same as from the message. The Last run date should limit the record selection.
- SAS token is not working with Azure storage account. – The connector functionality was extended to support the following authentication options:
  - SAK key on the storage
  - SAS token on the storage
  - SAS token on container

Internal

- Auto Fix does not give any message when clicking on the button. – The infolog text was added that the operation is completed.
- Message notification should be there on Successful SQL trigger. – The infolog text was added that the operation is completed.
- Project check will be executed after the message import from the EDI wizard.
- Label changes:
  - To-Increase labels were changed to STAEDEAN.
  - Workspace label was added to the Connectivity studio and EDI dashboards
  - The labels were updated to fix the spelling and grammar mistakes.
- The Help button was updated to use STAEDEAN documentation website.
- Condition for the not selected record is failing. – The empty string was used in the expression instead of the default empty values for the date type in case a record was not selected.
- For the "Connectivity studio Message designer" role, task operation can't be performed. – The security privilege was updated to include missed menu items.
- Error when copying a message with more than multiple mapping conditions on the same target record. – The error was thrown because a random first record was selected. For the copy functionality, we don't need to check if the record already exists. The copy behaviour was changed accordingly.
- MDM Available records page is not opening in the pull entity page if the source company is DEMF. - The wrong form setup and MDM entity were selected for the pull process buttons. The search was fixed to get the correct MDM form setup for the opened form:
  - If this is Pull - take form setup from the linked entity
  - Try to find the MDM entity for the current company as a source because it adds buttons to create and view the master data
  - Try to find the MDM entity for the current company as a target to add only MDM inbox button

- The MDM Company dropdown should show only the standard and External companies while creating target group. – The hierarchies were excluded from the lookup.

1.4 Functionality New and Changed

1.4.1 Freeway integration formats

1.4.1.1 General information

The freeway integration format (FIF) is basically a text document that uses the Identification (first three characters) to identify the purpose of the line. The main differences between the standard text documents are:

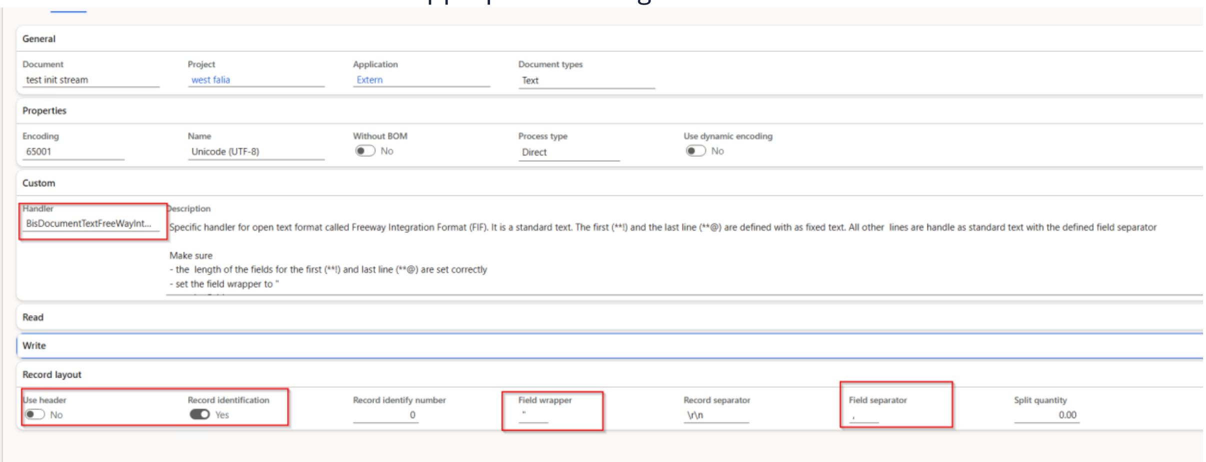
- The first line and the last line are handled as fixed text. So, the fields are not separated by a symbol, but the start position and the length are used to read the value.
- All identification start with *.. and the first line (**!) and the last line is (**@)
- If the field is a string and it contains the field separator it must be surrounded with double quotes.
- If the string field contains a double quote, it must be replaced by two double quotes

1.4.1.2 New document handlers

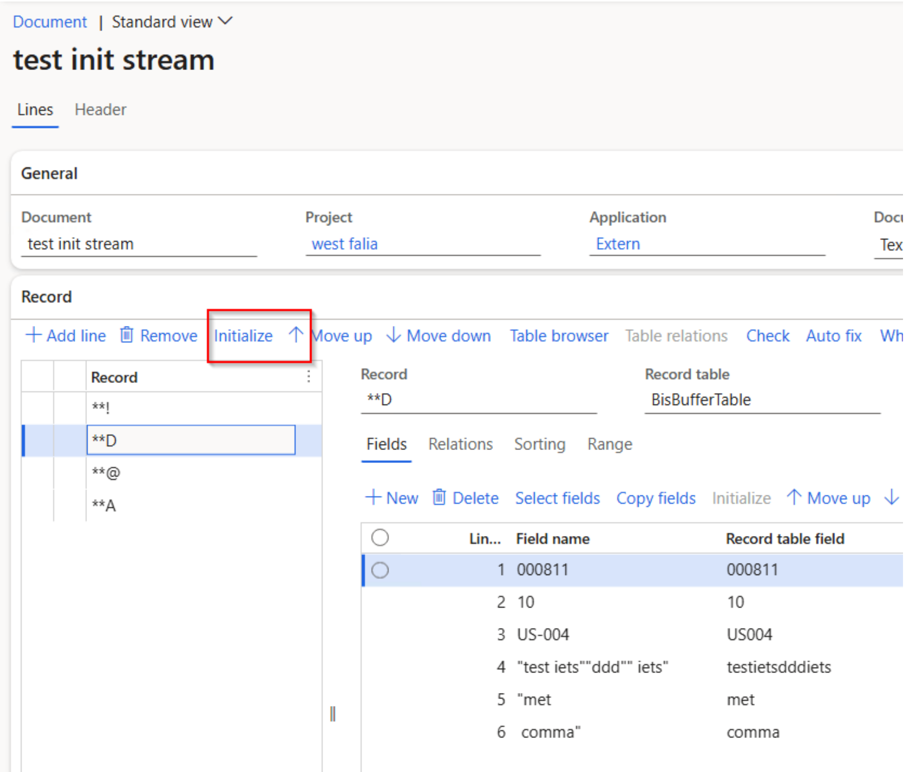
Two document handlers are created to support FIF:

- BisDocumentTextFreeWayIntegration
- BisDocumentTextFreeWayIntegrationV3

Use a text document and change the handler to one of the two based on the connector. The document itself should have the appropriate setting enabled



Once this is enabled, the document record and fields can be created. It is possible to use the initialize option on the line tab to fill the document record and the fields. For the first line (**!) and the last line (**@) the fields are hard coded with the correct length, so they can be handled as if they are fixed text.



The logic in the initialize is:

- If the document is already in use by a message it can only add a new document record and its fields. It will not update existing data in the document.
- If the document is not in use, it is possible to delete all current data in the document and recreate new data or only insert document records that do not exist yet.

After the initialization, the user still has to check the following setup:

- The parent, because there is no structure information present like in XML/JSON
- The field length by default is set to 60
- Only the **! and the **@ line the length etc are set according to the definition of Freeway integration formats.

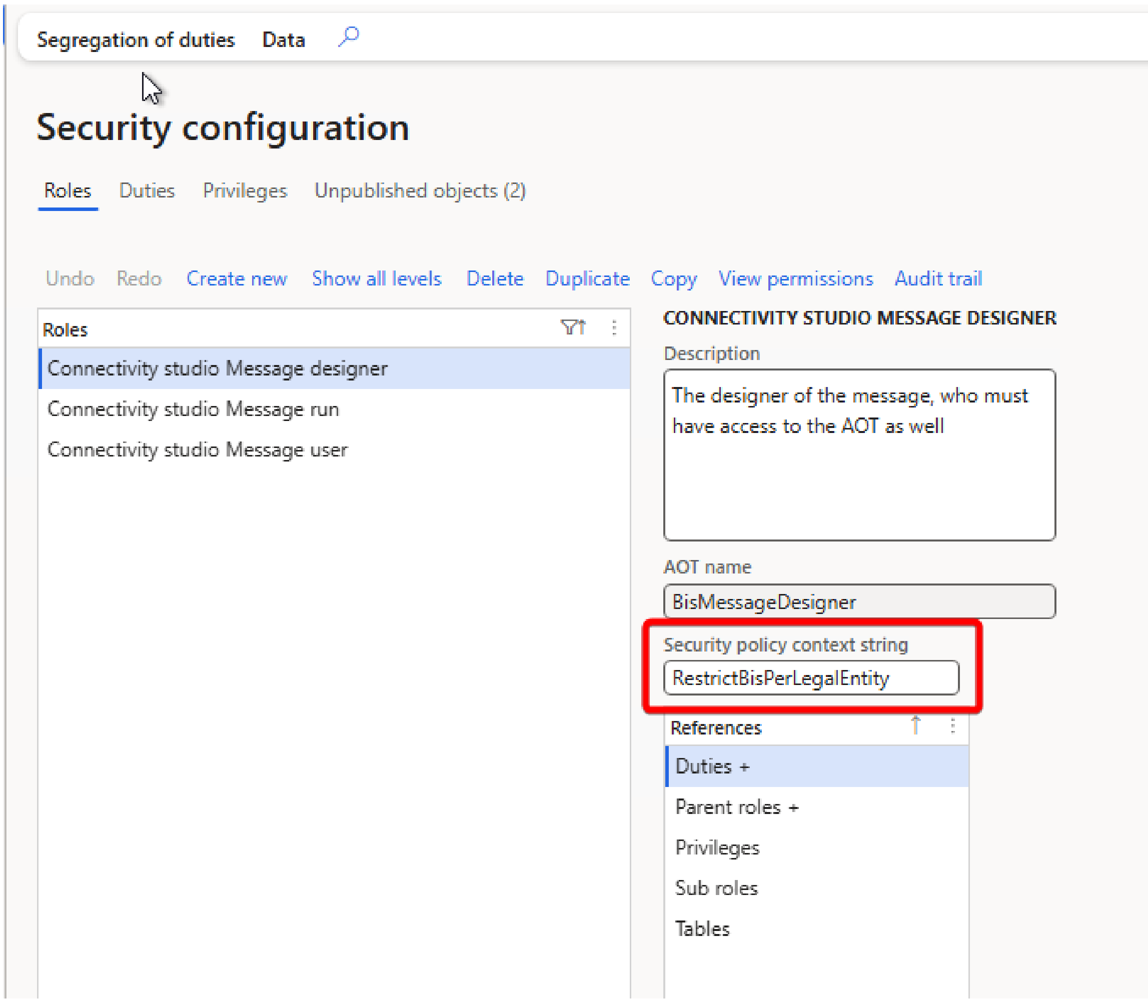
1.4.2 Legal entity specific view for common data in connectivity studio

A new security policy was created. The policy is going to limit the view of BIS entities to the current company.

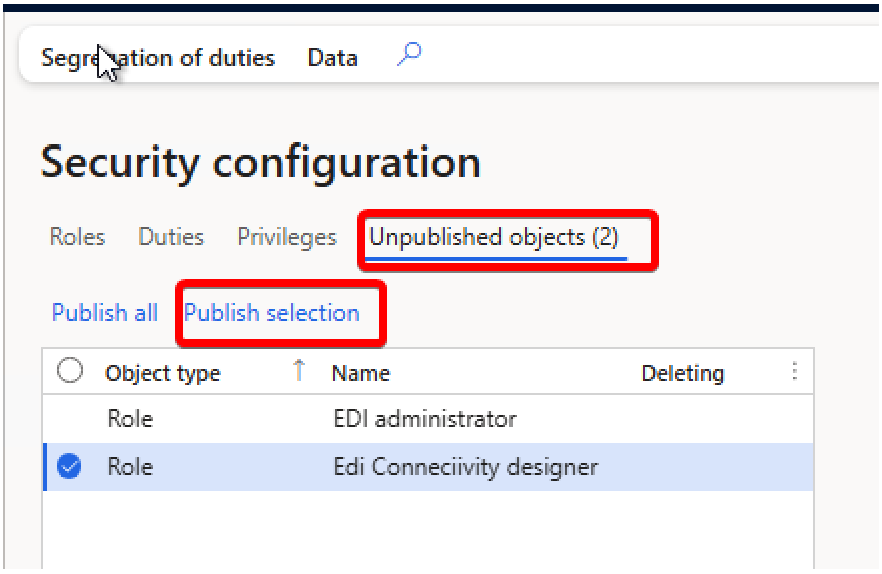
The role property should be updated in the UI to apply the changes.

System administration > Security > Security configuration.

Select the role you want to limit. Specify "RestrictBisPerLegalEntity" in the Context string.



Go to Unpublished objects, select the role and publish it.



The changes will be applied to all users with the role assigned.

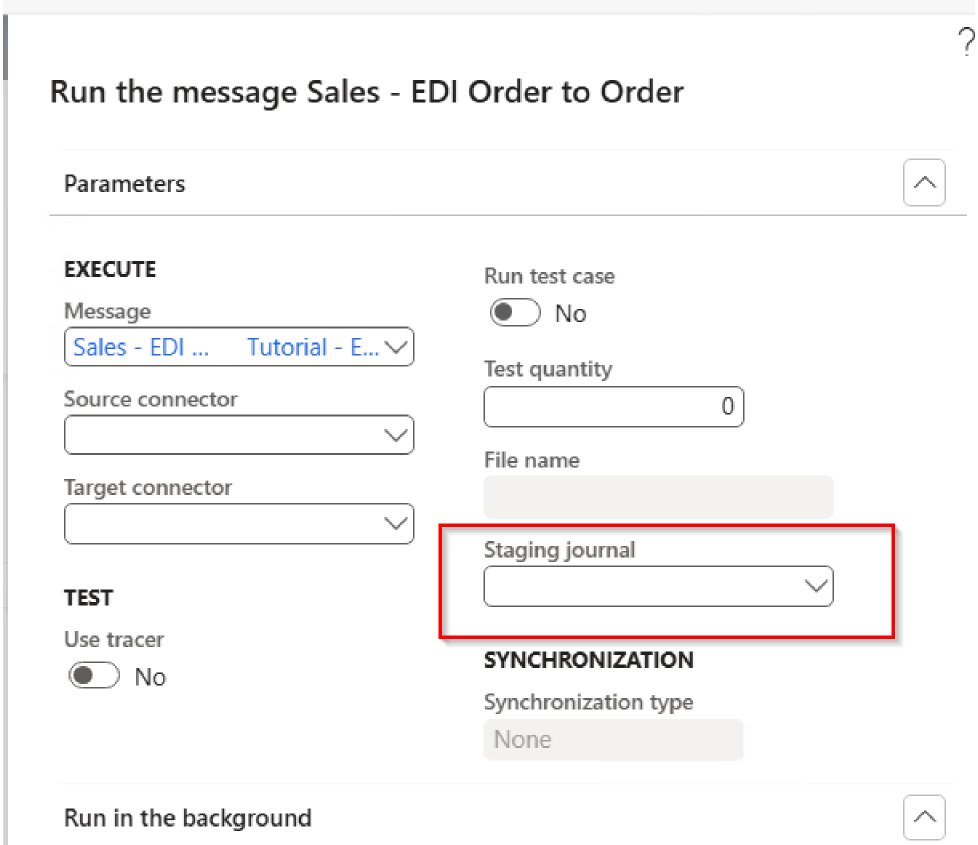
The following forms will show only the data from the current company:

- Connectivity studio history
- Data synchronization log
- Outbound message queue

1.4.3 Adding staging to run message

1.4.3.1 Run message

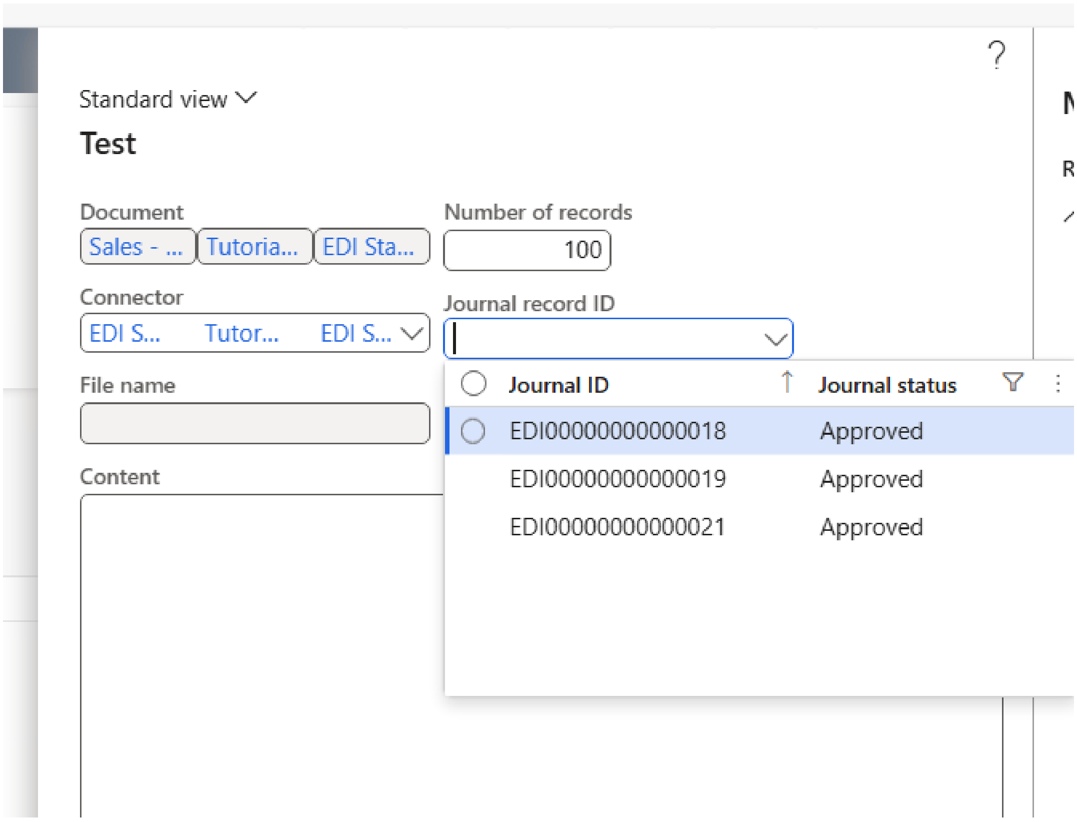
Currently, running the staging message will pick up all available journals and will execute the data. There is no option to only select one journal just for testing purposes.
To be able to test the staging message the option to select a staging journal is added.
It will only show the journal of the current company, with the appropriate statuses and the same document flow. Once the journal is selected, only it will be processed. A user can see the actual steps processed for this specific journal using the tracer.



The option staging journal will only be enabled in case the source connector is a staging connector.

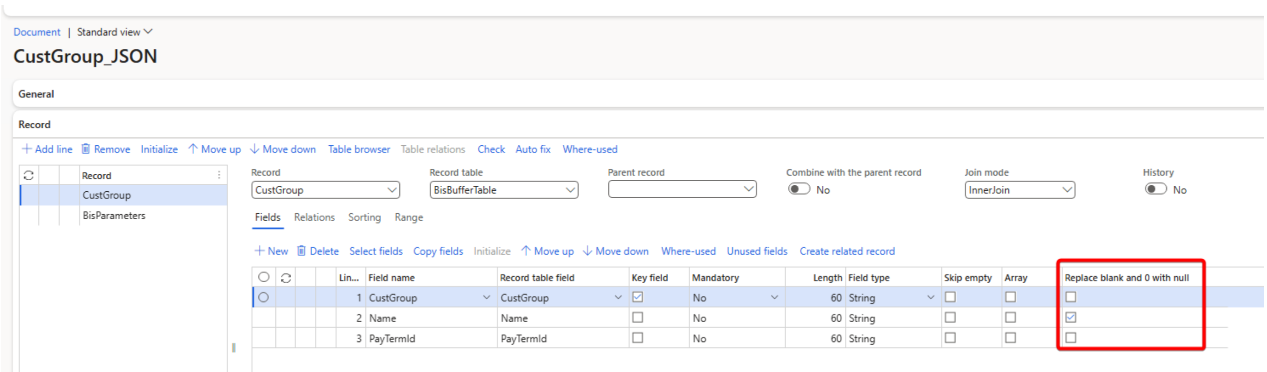
1.4.3.2 Test document

The test in the staging document is enabled now. If the source connector is staging, you can select a journal to run the test document.

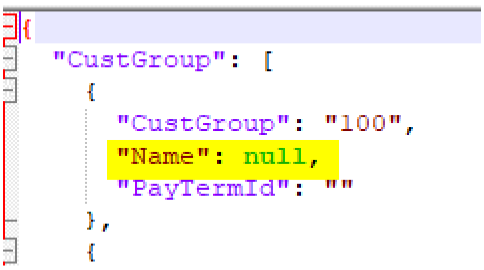


1.4.4 Generate JSON files with null values

A new parameter was added to the JSON document field setup.



If the parameter is enabled and the field value is 0 or an empty string, the value would be changed to 'null'.



1.4.5 EDI purchase confirmation - Delivery lines

The Delivery lines tab for the EDI Purchase confirmation showed all delivery lines despite the related journal. The form is fixed to represent the correct records.

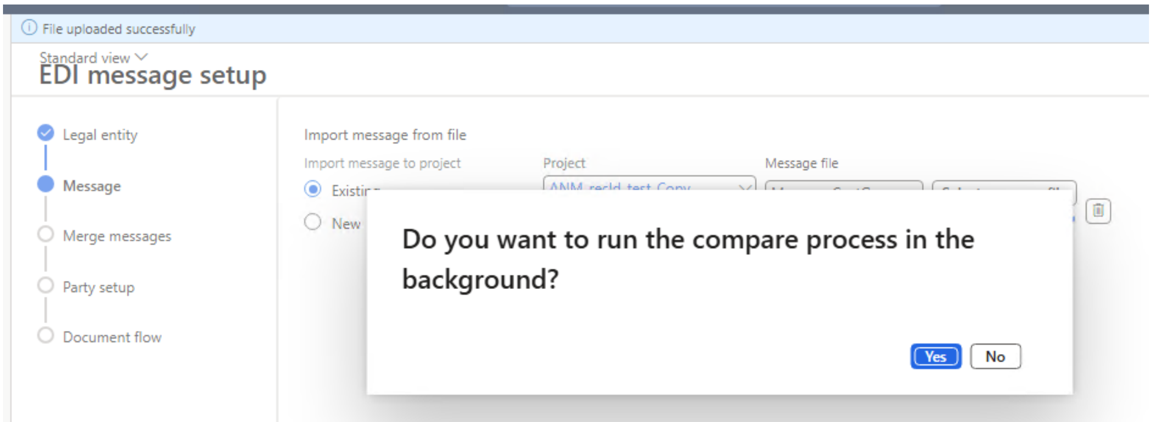
In addition, the delivery lines were stored across companies. The table is changed to the company specific. The company of the Delivery lines should match the company of the EDI Purchase confirmation lines.

The upgrade script is added to move the existing Delivery lines to the correct legal entity.

EDI > Periodic > Upgrade > Upgrade the EDI purchase delivery.

1.4.6 EDI wizard performance improvement

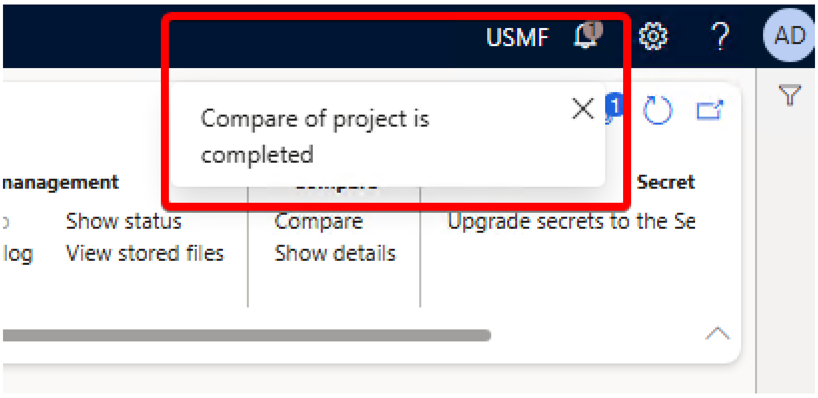
Due to the slow performance of the message comparison in the EDI message setup wizard, the possibility of executing the process asynchronously was added.



At the Message import step, if the message already exists, a new dialog is going to be shown.

- No - continue in the same session. A user has to wait to see the results.
- Yes - run the process in the background. Wizard is going to be closed. A user can continue working with D365.

When the background process is completed, the infolog is shown.

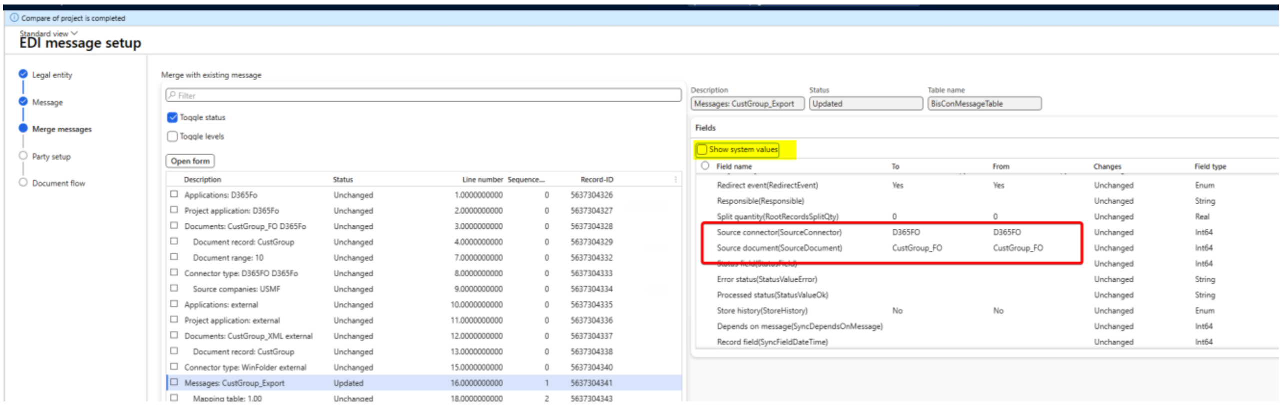


1.4.7 Meaningful values in the comparison form instead of RecId

Instead of showing RecId values, the To and From fields are going to display related record captions. For the enumerator value, a label will be displayed.

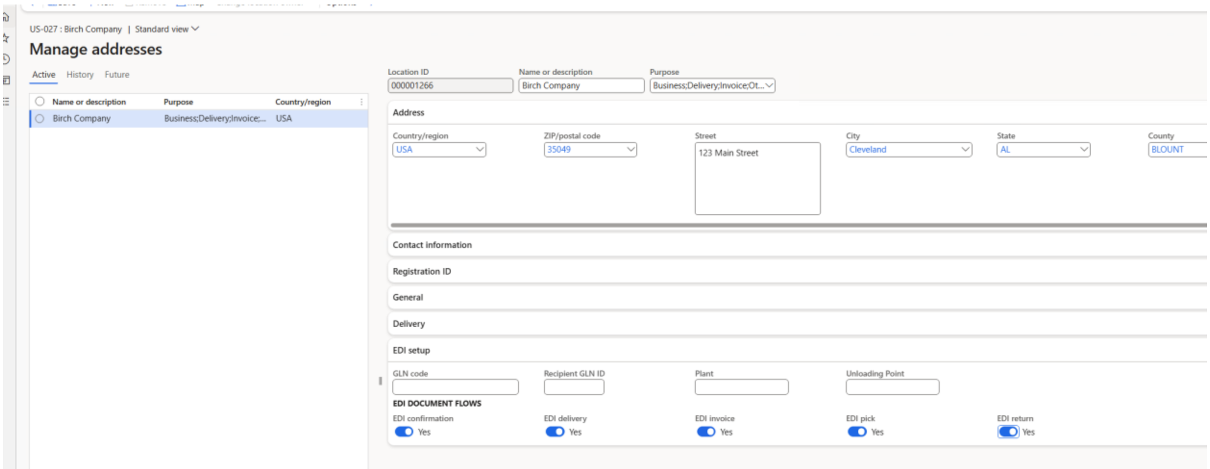
It's possible to display the system values of the fields using a new parameter.

The changes are applied to the comparison form in the EDI message setup wizard, in the Connectivity Studio Project form and in the Compare details side panel.



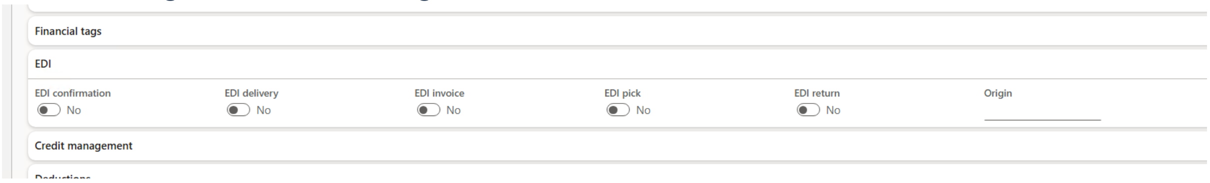
1.4.8 EDI configuration on the addresses

Normally, the customer defines which EDI document flows are possible for a specific customer. However, for certain addresses, the document flow doesn’t need to be sent. To achieve this, a new configuration was added to the addresses.



Define the option on the addresses to overrule the default behavior for the EDI document flow. All 5 EDI document flows are linked to the addresses and if this setting is enabled it will disable document flow for the current sales order.

In case the sales order is created, the EDI flags are set based on the EDI document flow setup and are overruled in case the new option to disable is turned on the address. The user can still enable it back. Whenever the customer, inventory dimension, or delivery address is changed, the EDI flags are determined again. All manual changes will be lost.



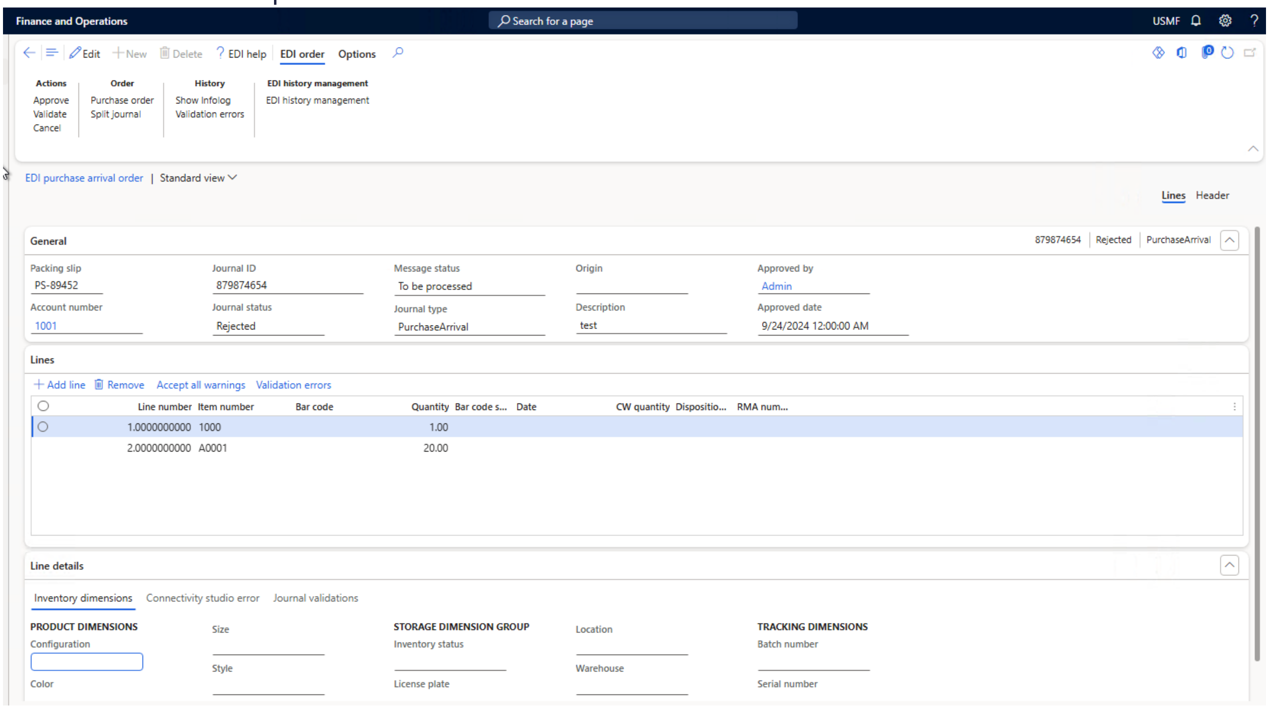
1.4.9 EDI purchase arrival

1.4.9.1 General

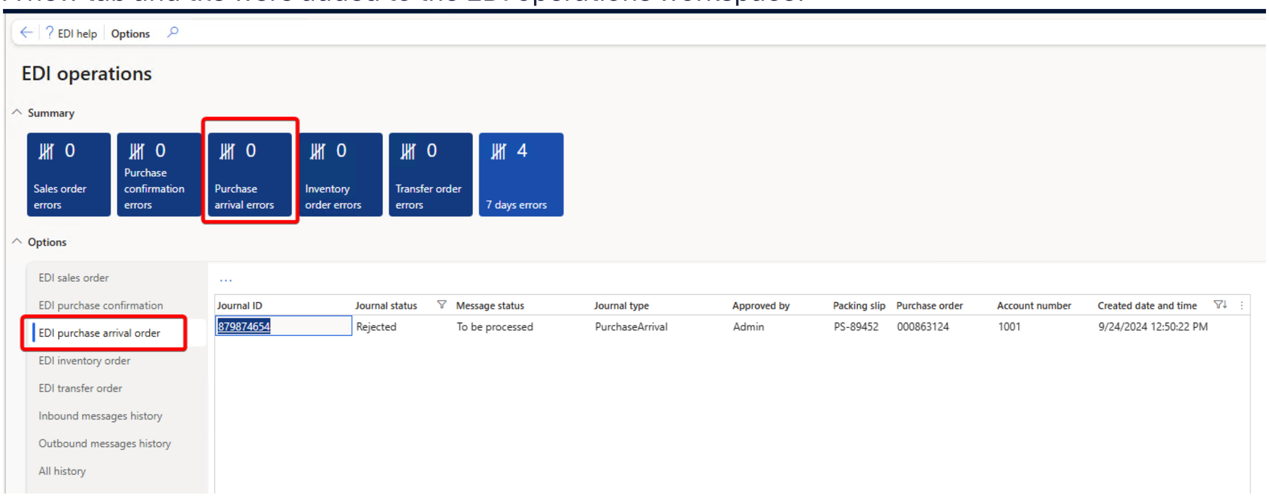
It is possible to use the Connectivity studio message to create Item arrival journals, however, this message lacks the option to use validation before creating data in the actual journal. For this reason, a new staging journal was created to import data into it. This would allow to use of the validation option.
The item arrival stagings contain fields similar to the standard WMSJournalJour and the WMSJournalTrans tables with the use of the inventory dimension fields.

1.4.9.2 UI changes

A new form was created to represent the staging data.
The behaviour of the form is similar to other EDI staging forms.
EDI > Common > EDI purchase arrival



A new tab and tile were added to the EDI operations workspace.



A clean-up process was created to remove obsolete data.
EDI > Periodic > EDI journal clean-up > Delete EDI purchase arrival journal

1.4.9.3 Validation rules

New validation rules for the staging were created:

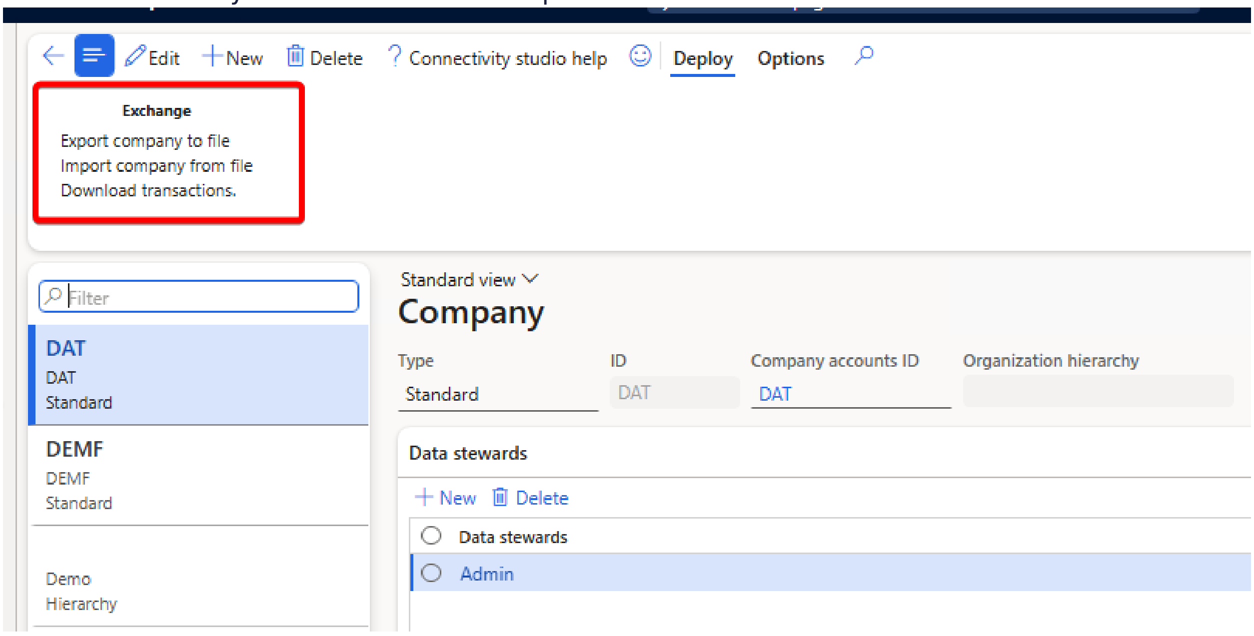
- BisEdiCheckPurchArrivalDeliveryDate - Checks if the purchase order has a line for this item with the same delivery date
- BisEdiCheckPurchArrivalExternalItem - Checks if the barcode is linked to the correct internal item definition. It uses the EDI party setup to check either the barcode, GTIN, external code, or standard item
- BisEdiCheckPurchArrivalItemId - Checks if the purchase order has a line for the item id
- BisEdiCheckPurchArrivalQty - Checks if there is a purchase line present for the same item ID with the same quantity
- BisEdiCheckPurchArrivalPurchOrderExists - Checks if the purchase order exists

1.4.10 MDM Export/Import

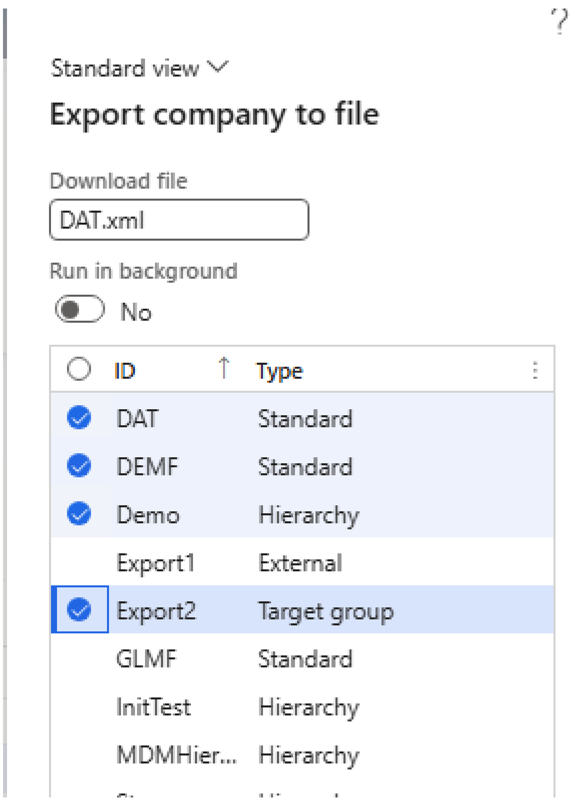
To share the MDM configuration between the environments, a possibility to export and import the data was added.
The Master data entity uses messages and companies in the setup, so those instances should be imported before the Master data entity.

1.4.10.1 MDM message export/import
Existing Connectivity Studio project export/import or version control could be used.

1.4.10.2 Company export/import
A new functionality was added for the Companies.

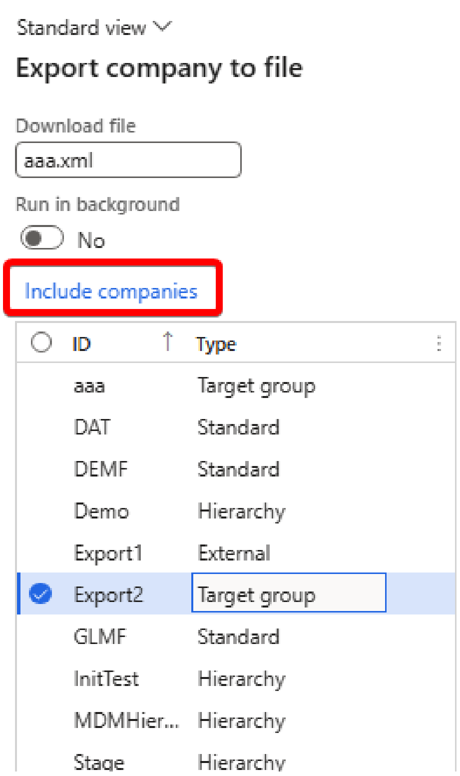


Export
By clicking the "Export company to file" button, a dialog is going to be opened.
Dialog has a grid with a list of companies. It is possible to select several companies to export.

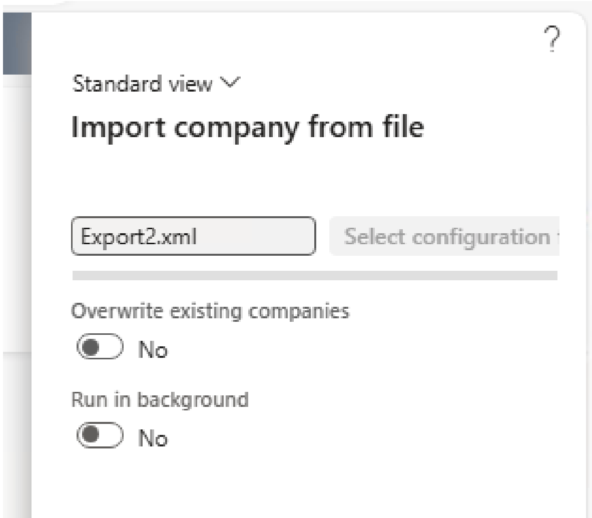


By clicking OK, an XML file with the selected company data will be generated.
Also, it's possible to execute the export in the background. If the "Run in background" option is enabled, the file could be downloaded from the "Download transaction" form.

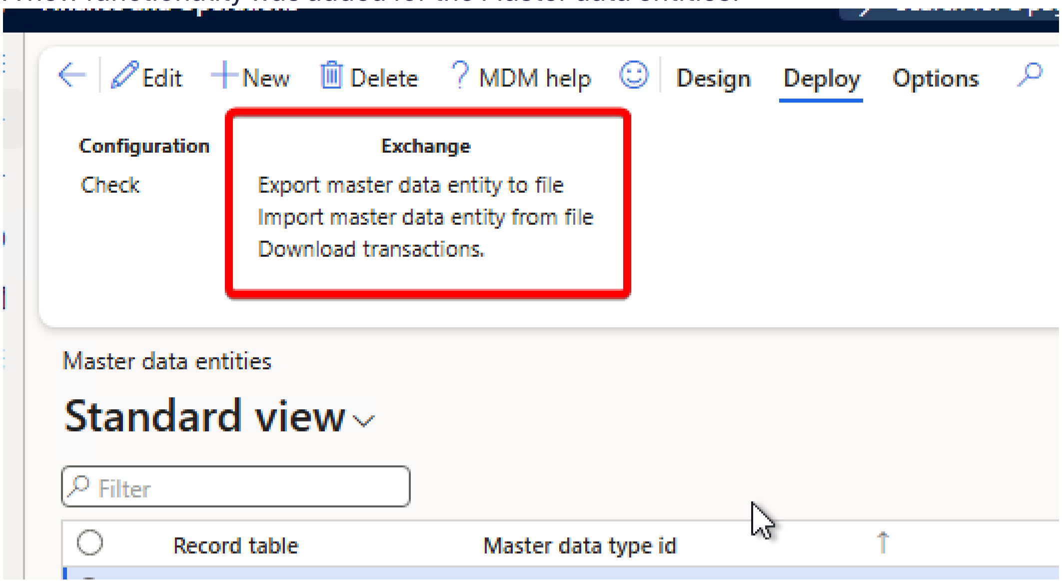
The export of the target group won't automatically include related companies. To add the companies as well to the file, please use an option in the dialog. It's enabled when the cursor is on the target group. By clicking, related companies from the target group would be selected.



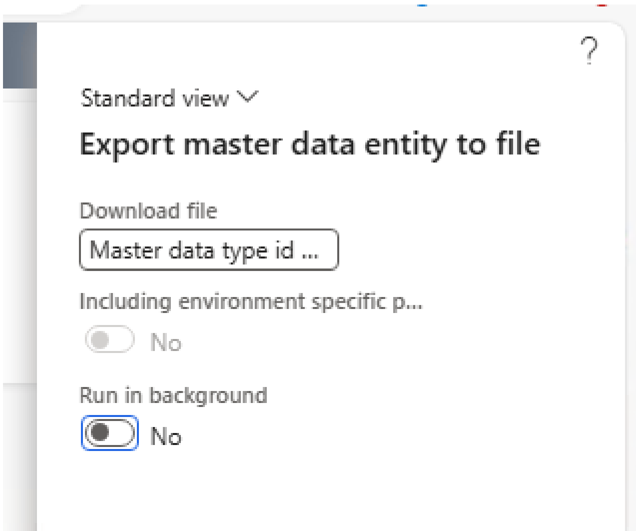
Import
In the import dialog, it's possible to upload the XML file with the company data.
If "Overwrite existing companies" is enabled, the existing company will be overwritten by the data from the file, including the data steward references.



1.4.10.3 Master data entity export/import
A new functionality was added for the Master data entities.



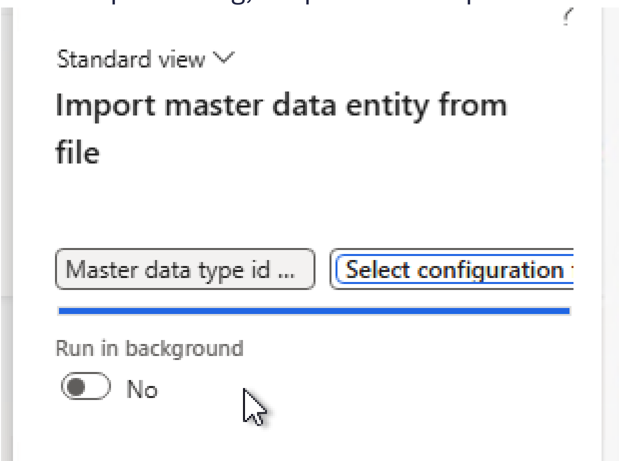
Export
Only one master data entity could be exported at the time. By clicking OK, an XML file with the selected master data entity data will be generated.



Also, it's possible to execute the export in the background. If the "Run in background" option is enabled, the file could be downloaded from the "Download transaction" form.

Import

In the import dialog, it's possible to upload the XML file with the master data entity data.



If the master data entity with the same type ID exists, a user will get the popups to allow overwriting of the data.
If the message or company does not exist in the D365, the Master data entity could be imported but the user will get the popups with the indication of what is missed.

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 STAEDEAN 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.

1.5.4 Approved by is not populated on the EDI purchase arrival journal lines

The Approved by field is not auto-populated when someone approves the line. As a temporary workaround, it’s possible to populate this field manually.