Release Notes for Business Integration Solutions 10.0.42.64 for Microsoft Dynamics 365 Finance and Operations

Release Notes

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Title	Release Notes for Business Integration Solutions 10.0.42.64 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 10.0.42.64 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 10.0.38, we recommend applying our STAEDEAN 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
02/07/2024	10.0.40.62	10.0.30	10.0.40	10.0.30 and above
02/10/2024	10.0.41.63	10.0.38	10.0.41	10.0.38 and above
31/01/2025	10.0.42.64	10.0.38	10.0.42	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 (This translation was not updated in the current release because of the Microsoft translation service errors)
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 1.0.0.61.

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

- Issue import and lookup dates format BIS Message. – The source field type was used for the dates conversion instead of the target field type.
- Issue regarding EDI fields. – The EDI process was changed to validate if the Origin field was not populated and automatically set it by default for sales and purchase orders if possible.
- Grid filter on workspace not working. – The default ranges for the status and date fields were changed on the Outbound queue tab of the Connectivity studio Integration operations workspace. They should not overwrite the custom ranges.
- BisEdiCheckPurchDeliveryDate validation logs error even when the dates are the same. – A new validation rule BisEdiCheckPurchDeliveryDateUsingLineNum was created. It checks if the DeliveryDate of the PurchLine equals the ConfirmedDlv of the journal line and uses journal LineNum in the warning text.
- Email alert with an empty error message is sent for rejected EDI journals. – The staging validation errors will be added to the alert.
- EDI validations are slow and killing the database performance. – For every staging table, the set of validation rules is selected first and this set is reused for each record of the table.
- Error message when mapping to a target variable. - The mapping filed validation is improved to take into account the message variables.
- Inbound EDI file not moved to Error folder. – If the validation rule crashes then the used file should be moved to the Error folder. Previously, it was stuck in the Work folder.
- Processing of messages EDI Inventory staging journal does respect dataAreaId. – If the current company is enabled, it will only select the data of the current company. This is the same behavior as for sales, purchase, etc.
- Change the validation rule "BisEdiCheckOrderAlreadyExistsForCustomer" – The two new rules were created instead to validate if the order already exists:
    - BisEdiCheckEDIOrderAlreadyExistsForCustomer - Checks if an EDI sales order exists for the same purchOrderFormNum and the customer.
    - BisEdiCheckEDIOrderAlreadyExistsForCustomerAndReference - Checks if another EDI sales order already exists for the customerRef and customer
- Cannot delete EDI purchase arrival. – The records will be shown in the Delete EDI purchase arrival journal form.
- No User ID for the user who checks a project out in version management. – The User ID is added to the Infolog to identify the person who locked the project. This change will only be visible for the project which is checked out after the fix is installed.
- Cannot move date value from purchase arrival to load. – The Staging journal lookup was fixed to display the EDI purchase arrival journals.

Internal

- Test Connection functionality for ODBC is giving a successful message for the wrong setup. – The “Test connection” function was improved to validate not only the Service Bus and ODBC connection but also if the database is reachable.
- BisEdiHistory does not throw an error in case the account /Edi party and or document flow cannot be found.

- AS2 web app 500 error. - Because of the timeout on the Azure app service (230 sec) the 500 error was returned but the file was processed. The file process will be stopped before the timeout.
- Remove duplicate blob and web service. – The dialog box and Infolog were added to the Remove duplicate blob and web service process to indicate that it was completed.
- A validation rule to check the lifecycle status of a product from engineering change management. – A new EDI validation rule BisEdiCheckLifecycleStatus was created for EDI sales lines. It checks the isActiveForPlanning property of the product lifecycle. Validation fails when the property is set to No.
- To check the impact of a new feature "Archive with Dataverse long term retention" on EDI studio. - Since we have the customization for the SalesTable and SalesLine where the EDI fields are added, we also added the same fields to the SalesTableHistory and SalesLineHistory tables. The archive feature could support custom fields.
- Target record is not used in the mapping. – It would be possible to use the target record fields right after the population in the message mapping.
- Test functionality is not working if there are field separators in the first line in the standard FIF handler. – It would be possible to use the separator defined in the text file. The initialize process is also fixed.
- The web service option is not automatically removed when we select the message option in the Process record in the outbound message. – Message and web service values could not be present in the dialog at the same time.
- Purchase order number is not displaying as a hyperlink in the EDI purchase arrival page. – The relation to the Purchase order was fixed.
- Slow performance of the message execution. – The issue was related to the import from the XML. In the case of using the same tags for multiple document records, it created multiple redundant records.
- Version management Checkout message is modified.
- Approve by is blank and the status is coming New in EDI sales order lines. – The status on the line level was not updated the same way as it was for the EDI sales order header.
- Direct read did not handle specific fields correctly. – The additional check was added to identify the correct SQL field names because they might not match the D365S&CM field names.
- MDM: Empty MDM entity setup shows the record in the Display fields tab. – It won't be possible to create a Display field or Range record without the header.
- MDM: Update the subscription groups by companies throwing the error. – The error was fixed and it would be possible to run the process.

1.4 Functionality New and Changed

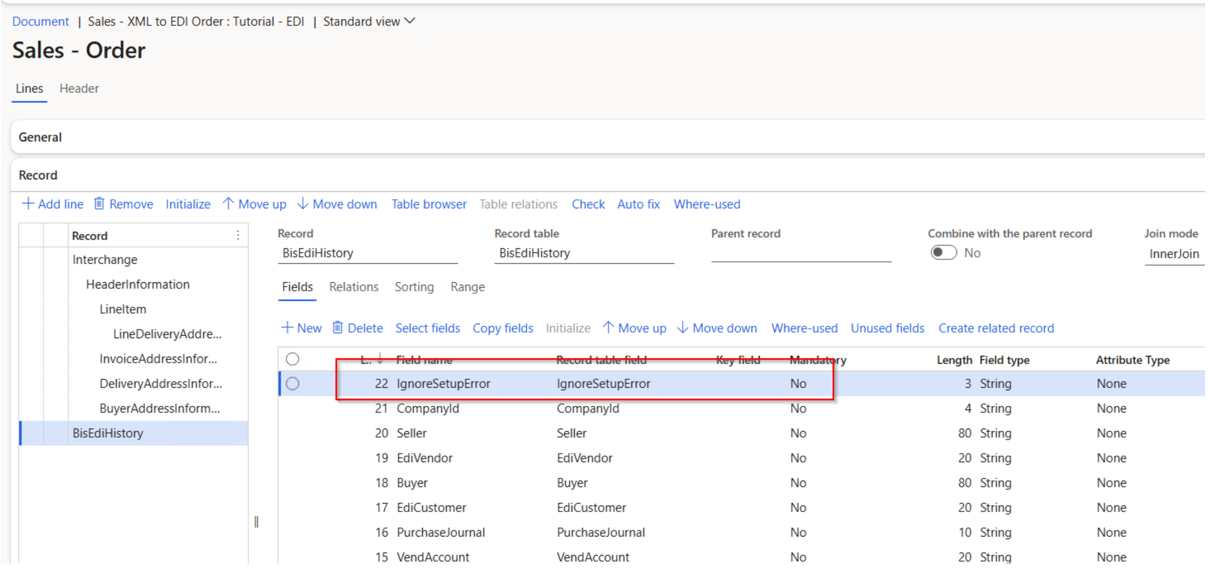
1.4.1 EDI party validation

1.4.1.1 Current situation

In the setup of the EDI, the message will fail if the document flow cannot be found. This is especially important for the inbound as the data is delivered by the customer and there can be a mismatch with the setup in EDI in D365FO.
Currently, the message fails and the user has to fix the setup and reimport the file. However, this is in most cases too complex for the user. With the new setup, it is possible to import the data even when the document flow can not be found.
Still, if the company cannot be found the message will give a fatal error. The reason for this is if the target company is not present the data may be created in the wrong company and moving the data from one company to another is complex. It is better to fix it and import it into the correct company again.

1.4.1.2 What was changed

The Edi history has to new field called IgnoreSetupError. If in the history the is field is set to yes it will not stop the import of the data if the EDI party and or the document flow is not found.



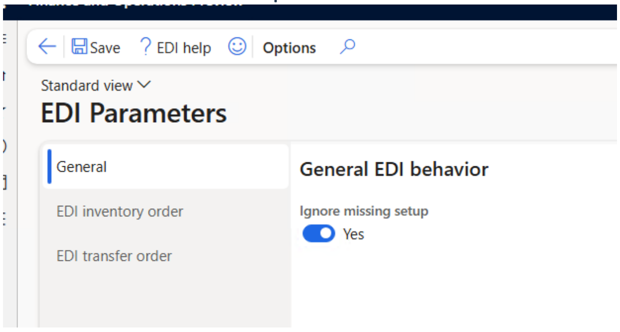
The following setup needs to be added to the EDI:

- In the target document the IgnoreSetupError field must be added to the EDI history.
- In the message mapping for EDI history the IgnoreSetupError must be set to ‘Yes’.
- In the EDI validation, two new validations must be added at the legal entity EDI party. On the jour table like BisEdiSalesJour add the following roles. Link them to the legal entity. This will set the journal to Rejected in case the customer is not found. This needs to be at the legal level because if the customer is not found it can also not find the validations for the non-existing customer.
  - BisEdiCheckCustomerDocumentFlowExists
  - BisEdiCheckCustomerExists

The same kind of validation is available for Vendor and Warehouse. Also, for the Purchase, Inventory, Transfer and Delfor journals.

1.4.1.3 EDI Parameters

In the BIS EDI parameters, the default value can be set. This means all inbound messages for EDI will use this default value. It is possible to overwrite this in the mapping of the import message.



The message will use the value defined in the EDI parameter as default so if enabled all messages will behave the same way.

1.4.2 Shared staging validations

The staging validations are stored per company. We have two major problems with it:

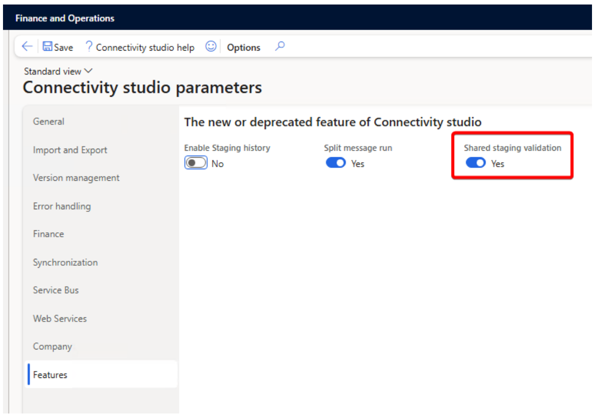
1. If validation is needed for all companies, it needs to be created in every company
2. Export/import of validations include only the current company. The data for other companies is lost.

New shared tables were created to avoid the issues with the export/import functionality and to extend the setup. The structure of the shared validation is similar to the existing one, but it stores the company ID in a separate field.

A new upgrade process was introduced to copy the setup data from old tables to new ones.

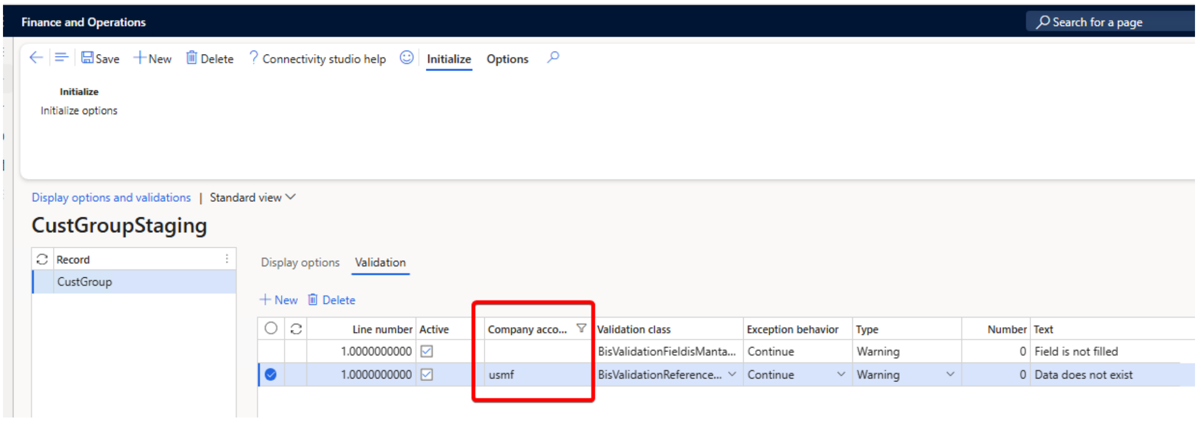
- Connectivity Studio > Periodic > Upgrade > Upgrade staging validations

After the execution of the upgrade script, a new feature could be enabled in the Connectivity studio parameters. Shared validations will be used for the staging.



When a feature is enabled, a new validation tab is shown on the Display options and validations form. The only difference to the old one is a Company account field. By default, only records for the current company and shared are shown.

To create a validation for all companies, keep the Company account empty.



1.4.3 Custom query

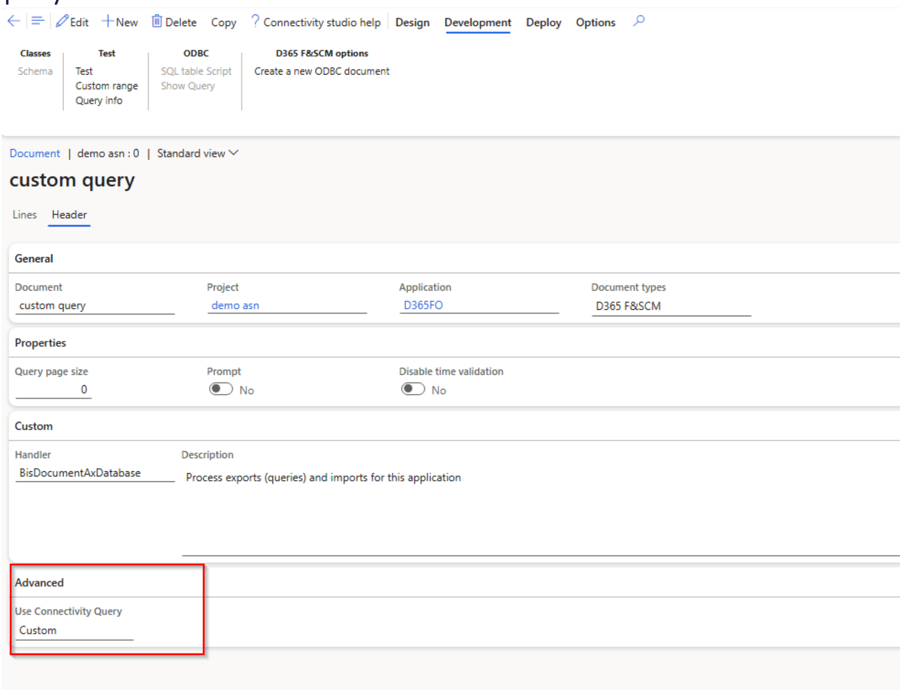
1.4.3.1 Background

In the current functionality, CS is using the standard Query build option defined by D365S&CM. This works correctly in most cases but it has also some restrictions.
Some of the restrictions are:

- Not possible to join data from another legal entity.
- Not possible to use first only in child records.
- Not possible to use group by and math expressions like sum, max, min, etc.
- Not possible to use grandparent fields in the relation

Also, the selection behavior is not always as expected especially in case of complex query and use of inner join, combine, etc.

In the internal documents, there will be an advanced option for Custom query. The default value is standard and uses the query as it is currently. The other option is Custom. With this option, the new query behavior is enabled.



When using the standard query, there is one D365S&CM query created which will select the data.

With the custom option, it will create a separate small query per document record to select the data. For example. A query SalesTable with CustTable and SalesLine. This will result in

- Loop query SalesTable
- Loop sub query for all CustTable with relation as defined by the setup
- Loop sub-query for all SalesLines

Due to the use of small queries, it is possible to:

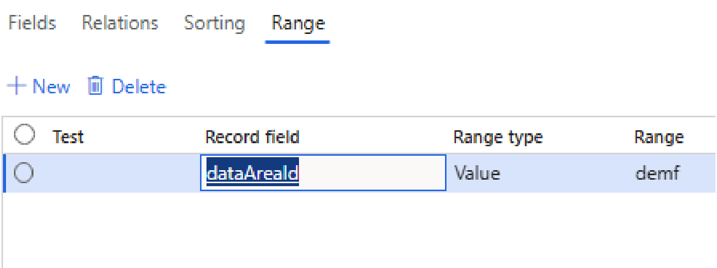
- Join data in another legal entity
- More control over the way the query behaves
- Use group by
- Use first only
- Use relations based on grandparents

The disadvantage is that the query will be slower compared to the standard query.

1.4.3.2 Join data from another company

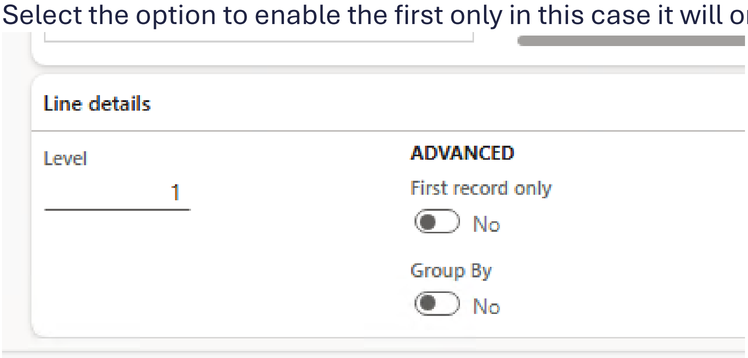
To be able to make a join to a record in another table, the dataAreaId field must be added.
When using dataAreaId to fetch data from a different company from a table, the join type on this table must be set to outer join.
Use this field in the range tab to set the needed companies:

- Standard behavior: do not add the range on the dataAreaId.
- One company: just select a company
- List of companies: add companies separated by ,
- All companies: use *



1.4.3.3 Select first only

Select the option to enable the first only in this case it will only select the first record.



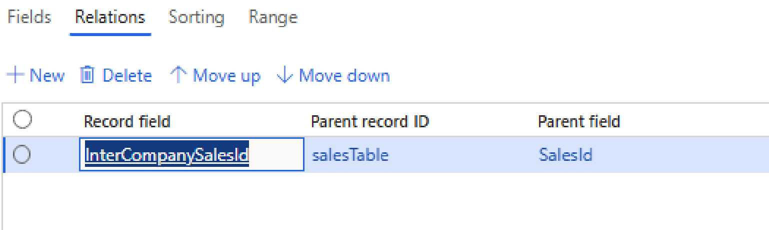
1.4.3.4 Group by

Enable the group by to make it possible to set the group by option. At least one field has to be set as group by. Options are:

- None – field will be ignored and empty
- Group by – field is used as a key field for the group by
- Avg – take the average value of the field
- Min - take the minimum value of the field
- Max –take the maximum value of the field
- Sum – take the sum value of the field
- Count – count the number of records

1.4.3.5 Grandparent relations

If the custom option is enabled, the Parent record ID field will be present. Normally, this filed is hidden and default filled with the parent record. Now it is possible to select a field from a grandparent.

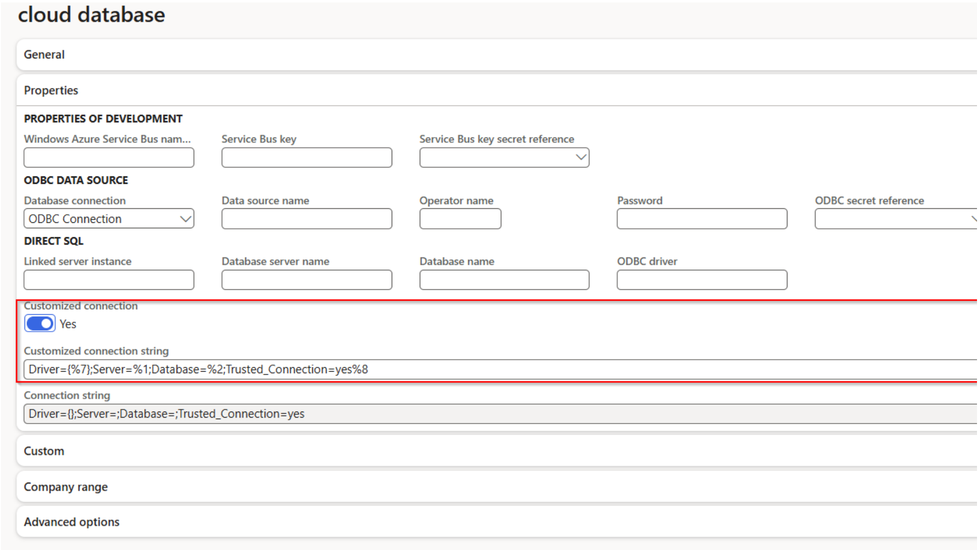


1.4.4 Flexible database connection string

The Database connector creates the database connection string. In some situations, the customers want to be more in control to alter the connection string. There is currently an option that can add options to the connection string, but it cannot alter the part of the connection string that is generated by the Database connector.
In the specific customer case, the customer did change their network settings. This change allowed access to an on-premise database from a specific IP address. This behaves like a connection to a cloud SQL database. However, in their case, one of the settings for the on-cloud database is set to no, while they needed to have this value to be set to true.
The workaround for the customer was to create an extension that creates the correct connection string.

1.4.4.1 Changes

Two new fields are added to the setup of a Database connector. The environment property has two new fields Customized connection (No/Yes) and Customized connection string.



To overwrite the connection string enable the option Customized connection. Initially, it will show the default connection string. The string can be altered as required. In the connection string, it is still possible to use values from the setup itself. These are defined as %1 etc.
Customize the connection string instead of using the default connection string. Create a string with the use:

- %1 - Database server name
- %2 - Database name
- %3 - Data source name
- %4 - Operator name
- %5 - Secret
- %6 - Time out
- %7 - OBDC driver
- %8 - ODBCAdditionalSetup (not on the form)

1.4.5 MDM Conditional export of mass data

MDM should allow the end customer to export the data from 1 entity to another entity based on some user-defined criteria that could be related to the joined entities. For example, export all products with item group 123 to this company.

1.4.5.1 Existing functionality

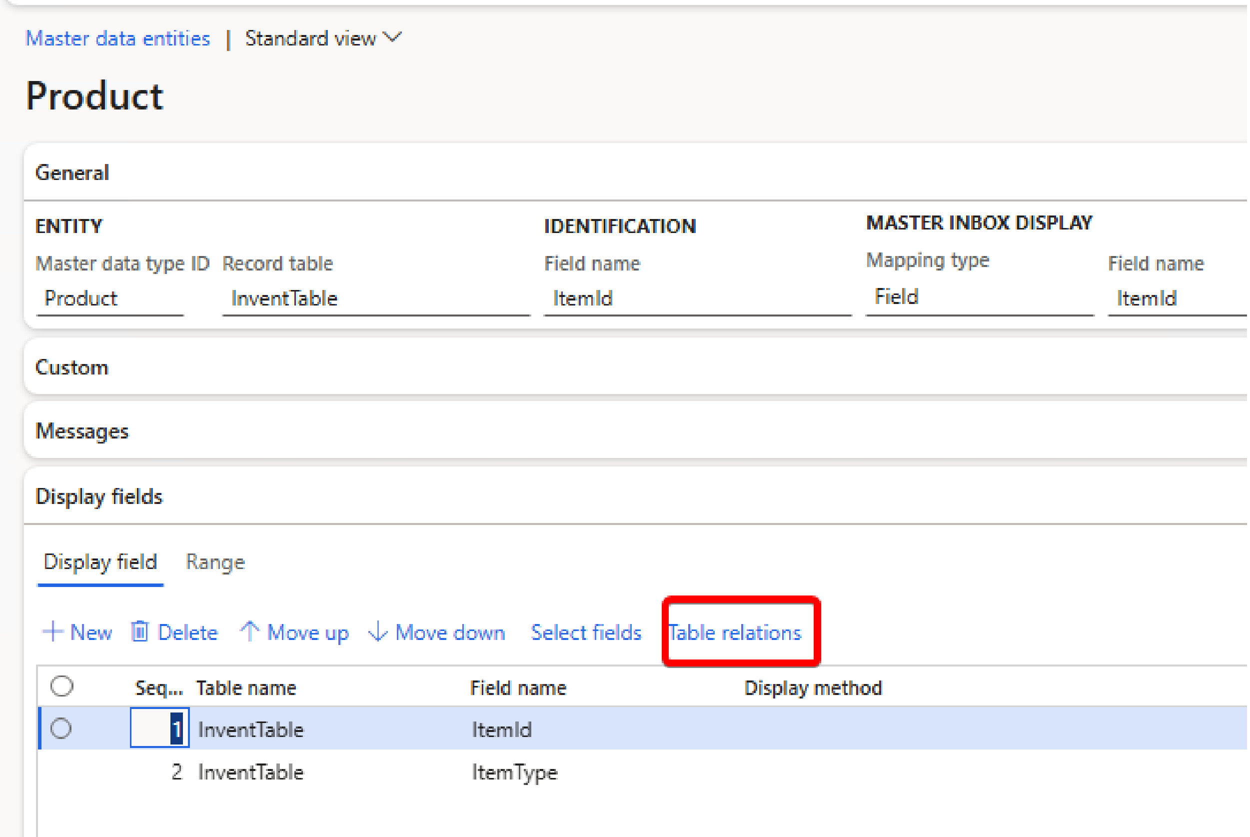
On the Master data entity setup, it’s possible to have the custom user range. In this case, the Available records will display only the records for the specified criteria. Available records support the multi-select, so user can select all records and create the master data.
Also, it’s possible to add the required field in the Master data entity setup Display fields section and filter by this field directly in the Available records grid.
The problem was that only fields from the root data source could be added to the range and display fields.

1.4.5.2 Solution

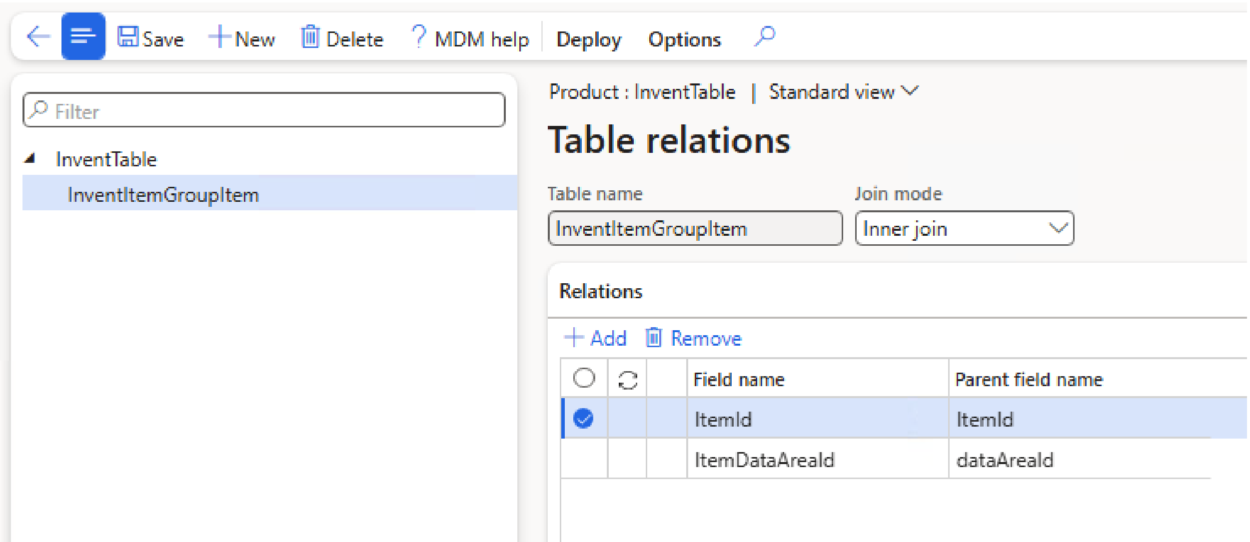
Add the possibility of joining tables to display the fields from the joined tables. The Available records grid will contain a column from the joined tables. Users can filter required records in the grid, mark them all and create the master data. We can also use joined tables in the ranges if needed.

1.4.5.3 Setup

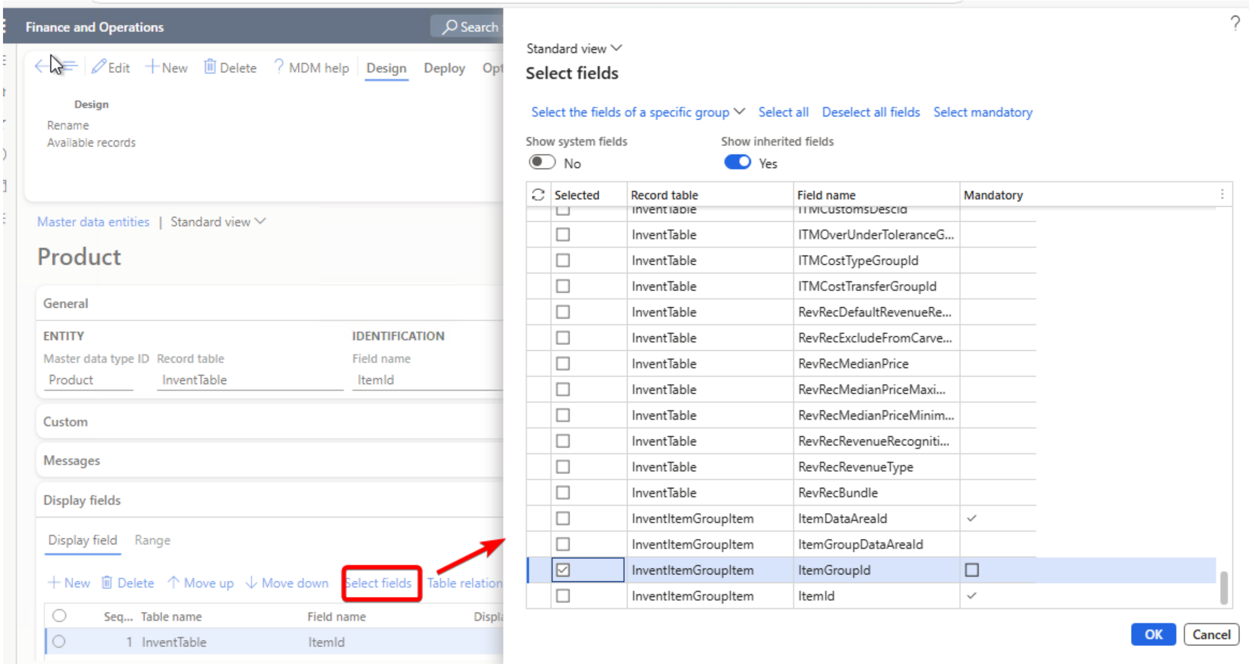
A new button was defined to specify the table relations.



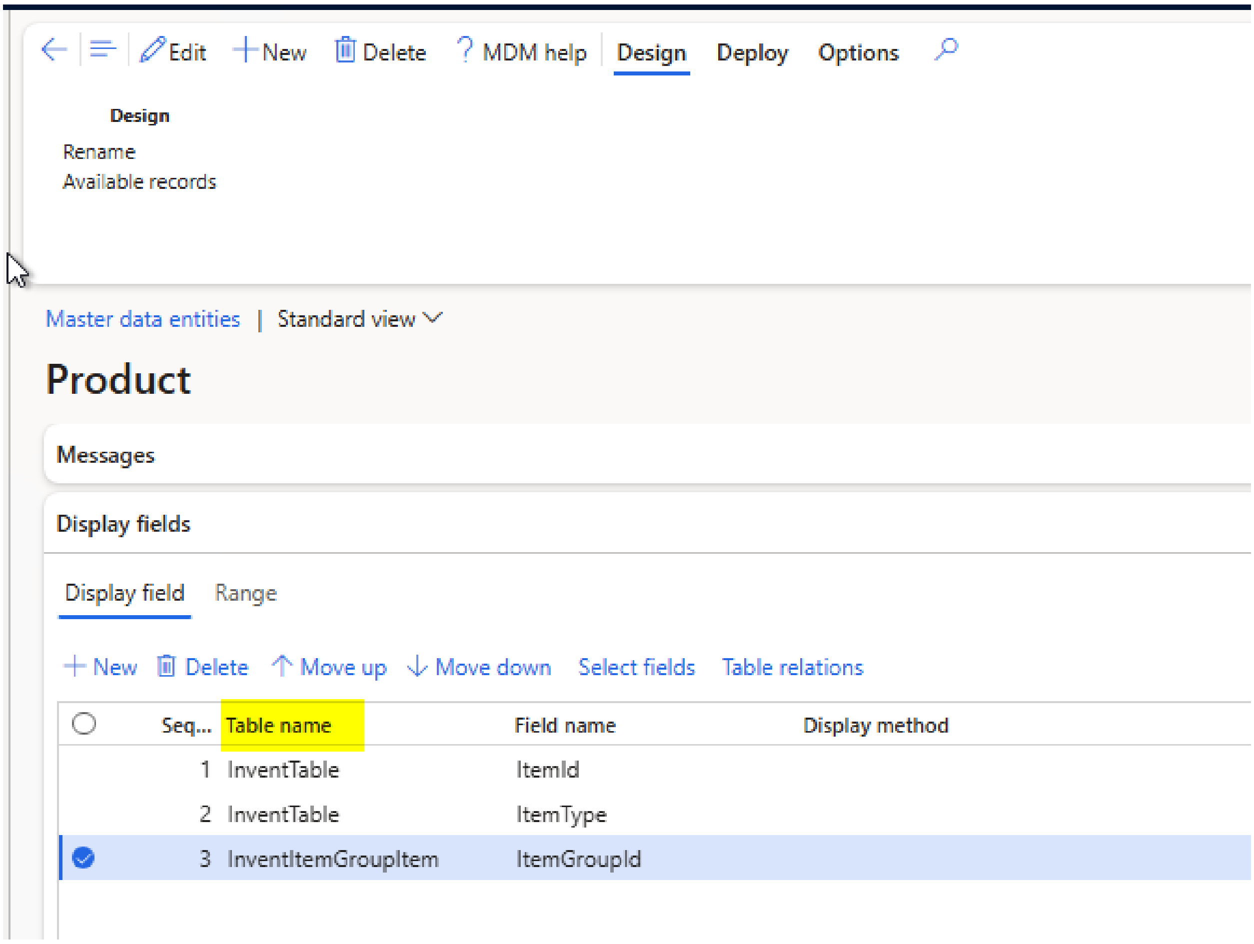
It's possible to specify the child data sources there, join mode and relations between the tables.



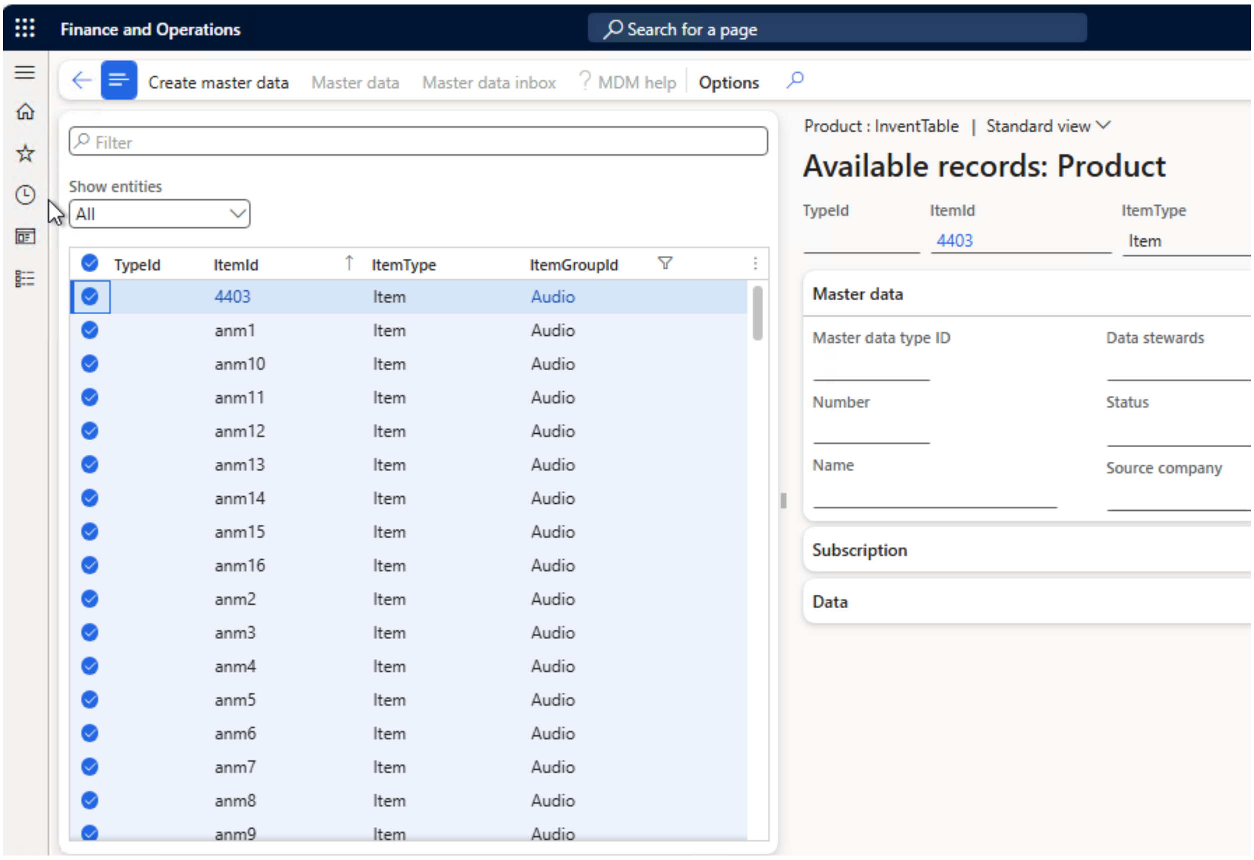
Now it's possible to add the fields from the child table to the display fields. You can use Select fields or add them manually.



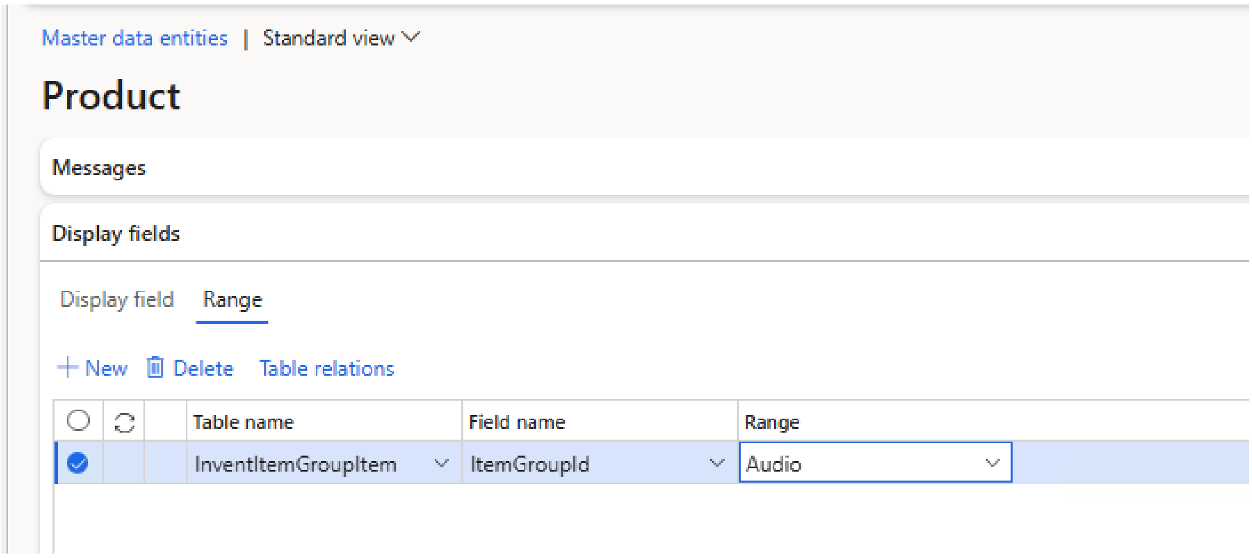
A new field “Table name” will display the data source of the field.



Now it’s possible to go to the Available records and filter the grid by a new field.



In addition, it’s possible to add the range to the Master data entity setup to have Available records filtered right away.



1.4.5.4 Upgrade script

To populate the “Table name” field for the existing Display fields and Ranges execute the process: Master data management > Periodic > Upgrade > Upgrade display field table name

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.