Author: Krishna Chaitanya Polapragada

TO INCREASE

Advanced Manufacturing and Project Planning 10.6.12.161 for Dynamics 365 for Finance and Operations 10.0

Release Notes

Table of Contents

Document Information

Title	Advanced Manufacturing and Project Planning 10.6.12.161 for Dynamics 365 for Finance and Operations 10.0
Subtitle (Subject)	Release Notes
Solution Suite	Advanced Manufacturing and Project Planning
Category	Release Notes
Author	Krishna Chaitanya Polapragada
Published Date	10/20/2023
Status	Final

1. General

1.1 Purpose

This document describes the functionality developed for Advanced Manufacturing and Project Planning 10.6.12.161 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.

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 Product release information

Advanced Manufacturing and Project Planning 10.6.4.152 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.34. 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 10.0.34 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.36, 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	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
20/10/2023	10.0.34	10.0.36	10.0.34 and above
26/07/2023	10.0.32	10.0.34	10.0.32 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 - To-Increase

Product	Version	Type	Remarks
AXTvp	10.6.12.161	Deployable package	
AXTctrl	10.6.12.161	Deployable package	
AXTplatform	10.0.16.19	Deployable package	

Important notes:

The minimal required AXtension® Planning & Control and AXtension® Invoice Processing versions for AXtension® Planning & Control - Subcontractor Management to work are:

AXtension® Planning & Control release 10.2.0.94

AXtension® Invoice Processing release 10.5.8.304

Advanced Manufacturing and Project Planning is compatible with the following solutions for Dynamics 365 for Finance and Operations.

Product	Remarks
Rapid Value	Optional, requires separate license
Advanced Maintenance and Service	Optional, requires separate license
Advanced Project Management	Optional, requires separate license
Product Engineering	Optional, requires separate license
Business integration Solutions	Optional, requires separate license
Invoice Workflow	Optional, requires separate license

Note that it cannot be excluded that above solutions may require merge efforts when applying them in one combined installation. This may affect functions and features of one or more of these solutions.

1.4 Advanced Manufacturing and Project Planning license coverage

Advanced Manufacturing and Project Planning is governed by licenses that control access to specific functions and features.

Feature	License	Remarks
Task Planning (Project)	APP	For Projects and Project quotations
Resource Planning (Project)	APP	For Projects and Project quotations
Capacity overview (Project)	APP	For Projects and Project quotations
Task Planning (Production)	AMP	For Production orders and Planned production orders
Resource Planning (Production)	AMP	For Production orders and Planned production orders
Capacity overview (Production)	AMP	For Production orders and Planned production orders

When both licenses are present, Advanced Manufacturing Planning works seamlessly with Advanced Project Planning.

1.5 Upgrade from earlier versions

Upgrade of Advanced Manufacturing and Project Planning from Advanced Project Planning 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.

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.

1.6 Model delivery – Discontinued.

Models are no longer going to be released from the current version.

If you still require the models, please contact our support team with a business reason.

#Note: If you have installed models from any of the previous releases of AMPP, you must remove them before installing AMPP 10.6.4.152 or later.

1.7   Important License update

The code signing certificate that is used for licensing the Axtension solutions is renewed. New licenses must be installed with this or later versions.

1.8   Support for multiple languages

At To-Increase, we are constantly working to upgrade our solutions and encourage customers to participate by sharing feedback. We had earlier launched an in-app feedback option in our D365 solutions, where our customers can share their feedback and requests while using our solutions. We did receive multiple requests for translations in other (European) languages. We picked the most requested languages and added it to our roadmap.

From April 2023 release, we do support Advanced Project Management in 10 different languages out of the box. The user interface is, as part of the strategy, available in the next languages: English (US), German, French, Spanish, Portuguese, Dutch, Italian, Norwegian, Swedish, Danish.

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.

If you are in the need for other languages or your business requires a different term, you can extend the label files with a small development effort.

If you have customizations on the translations in your current environment, check if this is done in a separate extension model and correct extension naming convention. If e.g., the name of the To-Increase label file in the English language is TILabel.en-US.label.txt, the new translation in German provided by To-Increase will get the file name TILabel.de.label.txt. Ensure your customization will then have a naming convention including the keyword extension. A German extension label file has then the name TILabel_extension.de.label.txt. The extension labels will have priority above the standard provided labels. You can also choose to remove your labels and uptake our new standard translations.

The next label file(s) are part of this release: List all label files.

LABEL.en-us.label.txt
LABEL.da.label.txt
LABEL.de.label.txt
LABEL.es.label.txt
LABEL.fr.label.txt
LABEL.it.label.txt
LABEL.nb-NO.label.txt
LABEL.nl.label.txt

LABEL.pt-PT.label.txt
LABEL.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.

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 features for this release

Feature | Task planning still showing quotes after project creation
Quotes with the status confirmed and an assigned project number are no longer visible on the task planning.

Feature | Cost Control budget lines security improvements
Users who are able to update Cost Control budget lines, are now also able to create new lines.

Feature | Link correct Hierarchy and CBS code to Posted Project Transaction with adjustment
When creating an adjustment for a Posted Project Transaction, it allows linking the correct Hierarchy and CBS code.

Feature | Function to transfer AXtension links back to standard WBS predecessors
On the menu of "Planning for Projects / Actions" there is a button to convert links back to standard predecessors called "restore predecessors":
- Only available if parameter "convert predecessors" is disabled.

- Validate on execution of the new function:
    - There is at least one open draft
    - There is at least one AXtension link
    - Ask for confirmation notify the following
        - warn about the existence of FF & SS Relations
        - warn about the existence of links to other hierarchies
        - warn about the existence of delay on links

- On execution update all WBS drafts (if multiple available) for the selected project. The following conversion rules apply:
    - All FS links become predecessors
    - Delay is removed
    - SS & FF links are removed
    - Links to other WBS hierarchies are removed

Feature | Parameter to disable AXtension predecessors
By default standard dynamics WBS predecessors are converted to the more advanced AXtension links but now there is an option to disable this.
- Parameter added: "Convert predecessors" (Default yes)
- When disabled, standard WBS predecessors are not converted.

Feature | Payment retention line did not populate from contract
When a billing rule is created based on a posted adjustment request, the payment retention is now set according to the contract

Feature | Set financial dimension when creating a billing rule from an adjustment request
When a billing rule is created based on a posted adjustment request, the financial dimensions are now set with the financial dimensions of the project.

Feature | Payment retention line did not populate from contract
When a billing rule is created based on a posted adjustment request, the payment retention is now set according to the contract

Feature | Set financial dimension when creating a billing rule from an adjustment request
When a billing rule is created based on a posted adjustment request, the financial dimensions are now set with the financial dimensions of the project.

Feature | Revenue and gross margin visible to reporting data
New "Revenue" field on the reporting data should contain the sum of "total invoicing" from revenue lines.

Feature | Revenue amount impact cleared when adjustment request is posted
On posted budget adjustments the impact on revenue was no longer visual. On posted budget adjustments the impact on revenue always was 0. This has been changed. For existing budget adjustments that are not yet posted, the revenue calculation on the budget adjustment must be executed to see the correct impact on revenue. On posted budget adjustments the impact on revenue will not be visible (remains 0).

Feature | Add adjustment request ID & Type to budget lines
Add adjustment ID and Type to budget lines after posting adjustment request.
On new version, adjustment request relationship remains.

Feature | New billing rules via adjustment request

For a fixed-price project it is possible to add billing rules on an Adjustment request.

Feature | Overspend on realized cost subassembly not shown

Hard and soft committed costs for production orders were always calculated based on the estimated costs. Realized costs were not taken into account. As a result an overspend on realized costs was not visible. This has been changed:
- Hard committed costs = Realized costs (incl. sub assemblies) - actual costs (if a production order is related to an item requirement)
- Soft committed costs = Estimated costs (if progress is 0%) or Realized costs incl sub-assemblies / progress) * (100 - progress) (if progress > 0%).

Feature | Add number of resources as column

It is possible to add the number of resources on an activity as a column in the task planning.

Feature | No CBS-code on approval journal

Invoice approval journals do not have the option to select a CBS code when creating a line on the approval journal for a project.

2.3   Discontinued features as per current release

No functional topics were discontinued in this release.

3. Fixes summary

3.1 Fixes for this release

Bug | Missing dependency check in license configuration

It was possible to enable the 'sub' Planning & Control licenses when the main Planning & Control license was disabled. This issue is now fixed

Bug | Progress on activity only for 'Hour' type cost and revenue lines

Calculation of progress on an activity also included cost and revenue lines of type 'Item' and 'Cost'. This has been changed so progress for the activity is based on progress of cost and revenue lines of type 'Hour' only.

Bug | Change default billing rule type

The default billing rule type has been changed from Milestone to Progress.

Bug | Cannot open All production orders with AXtension® Planning & Control disabled

When the configuration key for AXtension® Planning & Control is disabled in an environment, opening the production orders list page throws an error. This issue has been solved.

Bug | Revenue amount impact not calculated correctly

On the Adjustment request the Revenue amount and Revenue amount impact should be calculated correctly.
On posting the request these values are made persistent.

Bug | Exception creating Simulation planning

Creating a new production simulation fails when there is a production order included which is job scheduled and contains operations assigned to more than one resource.

Bug | Cluster lines not shown

When production order tasks were added to a cluster, on the cluster, the production order tasks were not visible. This issue has been solved.

Bug | Opening the production orders from a project resulted in error

Opening the production orders from a project resulted in error 'The required QueryBuildDataSource was not found in the Query associated with the FormDataSource 'AXTvp_SimProdTableView'. The QueryBuildDataSource should have the same name and table ID as the FormDataSource.'. This issue has been solved.

Bug | Error executing code: set (object), method union called with invalid parameters when highlighting referenced production orders

In the resource planning, when using the 'Highlight references' option, an error occurred in situations where one or more production task of an order are not visible in the resource planning as they are planned on resources that are not visible in the resource planning. This issue has been solved.

Bug | New data set after new budget version with new ETC method - initial EAC not ok

When changing the ETC calculation method on a budget version, when creating a new progress and estimate data set this calculation method was not taken into account. This issue has been solved.

Bug | Sub-assembly production costs do not consistenly roll-up

The roll-up of sub-assembly production costs not always rolled-up all costs of the sub-assemblies. This issue has been fixed.

Bug | Slow performance when closing the edit assignment screen

On the Resource planning using the Edit assignments screen for a task of more than 200 hours (assigned to a role) it takes a long time to complete to process the modifications after closing the form with OK. The reassigning of hours has been optimized to improve performance.

4. Known Issues

- Initialise: Calendar does not exist
  In some cases, the message is thrown while launching the resource planning form in projects

- For resource assignments without a role do not show on the project resource planning but the assignments are there.

- When adding a human resource with specific competences in the 'Edit assignments' form, and in the competences one or more certifications are specified, the lookup does not open and one or more warnings ('Resource certificate search criteria was not applicable to the query'). Not closing this warning will open the lookup when trying again (the lookup only opens if the warning is still visible). This issue occurs when feature 'Enable project resource scheduling performance enhancement feature' is not enabled. This issue is caused by a standard D365 issue and is solved in 10.0.28.