Author: Krishna Chaitanya Polapragada

TO INCREASE

Advanced Project Management 10.0.36.54 for Dynamics 365 for Finance and Operations 10.0

Release Notes

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Document Information

Title	Advanced Project Management 10.0.36.54 for Dynamics 365 for Finance and Operations 10.0
Subtitle (Subject)	Release Notes
Solution Suite	Advanced Discrete Manufacturing
Category	Release Notes
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1.   General

1.1   Purpose

This document describes the new functionality developed for Advanced Project Management 10.0.36.54 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	No	
New D365 functional topics considerations	No	
Bug fixes	Yes	
Discontinued features	No	

See chapter 4 for known issues.

Cross reference to LCS solutions:

Solution	Solution Version	Remarks
Advanced Project Management for Dynamics 365 10.0	54	Monthly release of D365 10.0

1.2   Audience

The audience for this document is certified partners selling and implementing as well as customers who have bought the solution.

Disclaimer: From the release 10.0.32.52, we intend to keep only relevant information on the features/ change requests/bugs going with the current release. For information on previous release notes, please refer to the release notes archive here.

1.3   Product release information

Advanced Project Management 10.0.36.54 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	TI-Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
20/10/2023	10.0.36.54	10.0.34	10.0.36	10.0.34 and above
26/07/2023	10.0.34.53	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*

#Note: From D365 7.3, Microsoft has changed the way additional Dimensions are handled. The goal for this move is to enable adding additional Dimensions in the application via code extension instead of over layering. Microsoft has introduced a Dimension framework in 7.3 to enable this, the implementation of this framework is treated as a transition process by Microsoft. Practically this means that any fix from Microsoft that they classify as an extensibility request is only delivered in the latest D365 release and that such fix is not backported.

With the introduction of the Dimension framework in D365 7.3 it has become the VAR's responsibility to implement any specific Dimension (such as the Project dimension) in the framework. To give the VAR a head start, To-Increase has created a separate model which can be used as a template by the VAR which implements the Tracking dimension "Project" as the newly introduced InventoryDimension08. As part of this deliverable To-Increase will evaluate case by case whether it will honour any requests for fixes which are resulting from Microsoft not backporting fixes as mentioned above. To-Increase makes no promises that it can and will fix all bugs that Microsoft does not backport.

In case multiple ISV solutions have been installed which are adding Inventory Dimensions, the VAR needs to decide which dimension to use. To-Increase supports the implementation as delivered via the PbmPIMVAR (Project Inventory VAR) model in case another dimension is implemented by the VAR it is the VAR's responsibility to support this.

Advanced Project Management is compatible with the following solutions for Dynamics 365 for Finance and Operations 10.0:

Product	Remarks
Rapid Value	Optional, requires separate license and separate deliverable
Advanced Maintenance and Service	Optional, requires separate license
Advanced Project Planning	Optional, requires separate license. It is possible to create new tasks in Advanced Project Planning. However, we recommend creating new tasks in Advanced WBS. Features like sub projects, cost codes and equipment transactions are not part of APP.
Product Engineering	Optional, requires separate license and separate deliverable
Business Integration Solution	Optional, requires separate license and separate deliverable

1.4   Certificate Renewal Information

As an Independent Software Vendor, we provide you with licenses which can be used to enable/use our solution. These licenses are based on a Microsoft certificate which is part of our solution. This certificate expires every 3 years, this year per 09-06-2023. At that moment it must be renewed, and new licenses need to be installed.

Please make sure you install the latest update before June 9th, as these releases do contain the new certificate. Together with this update, you must install the new license. New licenses will only work together with the new certificate.

In case you get an error message 'license is not valid' during installation, then there is a mismatch between license and software package. After installing the latest update and latest license, please verify by logging into the application and see the respective menus.

Please note that if you try to re-load licenses for standard D365 F&O (e.g., adding more users) before installing the latest version and license, it will cause a re-validation of all ISV licenses, and that will cause the license for the To-Increase solution to fail as the underlying certificate is no longer valid. Users can no longer make use of the functionality.

If you have not received the new license deliverable(s), you can obtain the new license(s) from To-Increase by sending an email to swdist@to-increase.com. Also, do not forget to mention the LCS project name and URL to which the license needs to be added.

After installing the update, the security certificate renewal can be completed in 3 simple steps.
Step 1: Install the update and navigate to the Solution Management Workspace
Step 2: Click the 'Retrieve available licenses' in the action pane.
Step 3: Validate the licenses for correctness and completeness and click import.

Click here for more information on the Solution Management Workspace.

1.5   Model delivery – Discontinued.

Models are no longer going to be released from "Advanced Project Management 10.0.34.53" release onwards. 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 APM, you must remove them before installing APM 10.0.34.53 or later.

1.6   APM license coverage

Advanced Project Management is governed by three licenses that control access to specific functions and features.

Feature	License	Remarks
Project Logistics	APM I	
Project Inventory	APM I	
Quotation Statement	APM I	
Quotation Margins	APM I	
Project Change Orders	APM I	
Advanced WBS • Sub-projects in Quote WBS • WBS template	APM I	
Advanced WBS • Summary / Detail • Quantities and units • Progress & Earned value • Budget and budget allocation • Subcontracting • Progress billing • Equipment transactions • Cost breakdown (CBS) • Estimating and formulas • WBS integration	APM II	
Equipment	Equipment	
Options and alternatives	APM II	
Cost codes	APM II	
Calculation and bid rates	APM II	
Additional costs	APM II	
Subcontracting	APM II	
Progress billing	APM II	
WBS cost control	APM II	

Equipment costs and revenue	Equipment	
Timesheets	APM II	
Pricing via Construction template	APM II	
Quotation Statement	APM I	
Quotation Margins	APM I	
Advanced Project Costing	APM I	For the Analytics section of the Advanced project management workspace Power BI is required, as with the Analytics section of other workspaces in D365 FO.

Important: In this release, Advanced Project Management I (APM I) and Advanced Project Management II (APM II) are only supported with active licenses for both, it is not possible to run Advanced Project Management I without the license for Advanced Project Management II.

1.7   Upgrade from earlier versions

Upgrade of APM from APM for D365 7.3 onwards is supported via the use of the migration process and tooling as required to upgrade from Microsoft Dynamics 365 for Operations.

From 8.1 to 10.0, there are no upgrade scripts required. Please refer installation guide for further information.

Important update:

If any customer plans to update to any build later than 10.0.29 for APM, you must uptake this latest release delivered on the top of 10.0.28 initially to get rid of any compilation errors.

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.
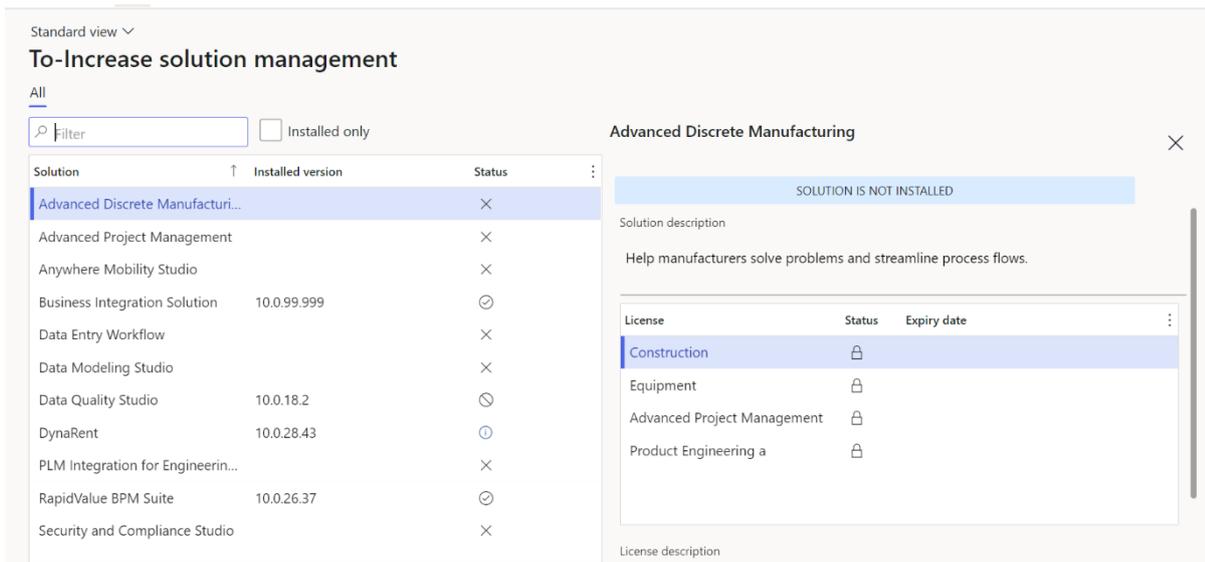
2. New features

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

No new features for this release.

2.3 Discontinued features for this release

No features and functional topics are discontinued for this release.

2.4 Fixes for this release

Id	Description
158061	CS00222407 | when an on-account transaction created from advanced WBS is opened in standard WBS, we get a warning message "Project category must be filled in", and we are not able to close the form. This is now fixed.
171104	CS00225991 | Sales orders are created with blank lines if quotation transferred to project
171675	CS00226263 | When adding a cost price for hour it is not visible what resource number is.
173707	CS00226617 | Progress amount updated to zero when refreshing the subcontract progress bill
173917	CS00226702 | Correcting a progress bill brings up wrong claimed amount. This was fixed.
175005	CS00226964 | Doubling/tripling the activity numbers in the activity drop down after posting a progress bill. This was fixed too.
162353	AX-ADM-62229 |After publishing the root project node, there may be inconsistency in the WBS ID's. This can only happen when the activities are attached directly to the root node and there are sub-projects. – This known issue is also fixed.
KB4580526	When a purchase order associated with a project is confirmed, you will see an error that "Conversion between %1 and %2 does not exist" when the Purch unit & sales unit are different. This was fixed.

3.   Known Issues

3.1   Known issues for this release.

Title	Description
Error while fetching ISV license keys	In the action centre, where you see the notifications, up on loading the D365 URL, you will see an information which says "Error while fetching ISV license keys" – Users who will use APM along with AMS may see this error due to a deprecated feature on AMS, after release 10.0.31.26. Customers who will update to a version after to release 10.0.31.26 will need to remove/delete the configuration key Select 'Dynaway Service Portal' and click 'Remove selected license'. If the customers are already using a build later to 10.0.31.26, they may reach out to Microsoft to delete it for them to get rid of this notification.

3.2   Known issues from previous releases.

ID	Title
AX-ADM-161006	When progress bill is set to OFF the bid rate is not getting calculated correctly for Time and Material project.
AXADM-45275	With progress bill retention and retention tax is calculated at root project. Apply Tax calculation at sub-project level for retentions is not yet supported.