

# Advanced Project Management- Asset Management 10.0.32.12 for Dynamics 365 for Finance and Operations 10.0

Release Notes

# Table of Contents

<b>1.</b>	<b>General.....</b>	<b>4</b>
1.1	Purpose.....	4
1.2	Audience.....	4
1.3	Content list.....	5
1.4	Certificate Renewal Information.....	6
1.5	APM license coverage.....	6
1.6	Telemetry data.....	8
1.7	Support for multiple languages.....	8
<b>2.</b>	<b>New features .....</b>	<b>10</b>
2.1	Common features .....	10
2.2	New for this release .....	11
2.3	New for previous releases .....	11
2.4	New functional topics considered for this release.....	14
2.5	New functional topics considered for previous releases.....	14
2.6	Discontinued features for this release.....	15
2.7	Discontinued features for previous releases.....	15
<b>3.</b>	<b>Fixes summary .....</b>	<b>17</b>
3.1	Fixes for this release .....	17
3.2	Cumulative fixes from previous releases.....	17
<b>4.</b>	<b>Known Issues .....</b>	<b>19</b>
4.1	Known issues.....	19

# Document Information

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# 1. General

## 1.1 Purpose

This document describes the new functionality developed for Advanced Project Management- Asset Management 10.0.32.12 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	No	
Discontinued features	No	

See chapter 4 for known issues.

Cross reference to LCS solutions:

Solution	Solution Version	Remarks
Advanced Project Management – Asset Management for Dynamics 365 10.0	12	

## 1.2 Audience

The audience for this document is the certified partners selling and implementing as well as customers who bought To-Increase APM solution who wants to use standard D365 Asset Management instead of Enterprise Asset Management.

This release is mainly intended to uptake & renew the latest security certificate for To-Increase solutions.

## 1.3 Content list

Advanced Project Management- Asset Management 10.0.32.12 for Dynamics 365 for Finance and Operations 10.0 is released on the following Microsoft Dynamics 365 for Operations build.

Installed build version	Platform build version	Remarks
Microsoft Dynamics 365 for Finance and Operations 10.0.30	Platform Update 54 or higher	

### 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.

#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 – Asset 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](mailto: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 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 <ul style="list-style-type: none"> <li>• Sub-projects in Quote WBS</li> <li>• WBS template</li> </ul>	APM I	
Advanced WBS <ul style="list-style-type: none"> <li>• Summary / Detail</li> <li>• Quantities and units</li> <li>• Progress &amp; Earned value</li> <li>• Budget and budget allocation</li> <li>• Subcontracting</li> <li>• Progress billing</li> <li>• Equipment transactions</li> <li>• Cost breakdown (CBS)</li> <li>• Estimating and formulas</li> <li>• WBS integration</li> </ul>	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.

Similarly, for equipment feature to work, APM II license must be installed as a prerequisite.

Please ignore the best practice warnings in the solution as they are expected. This shall not have any impact to the functionality.

If there is no data by default, please run the create data wizard as a prerequisite to process data packages.  
Path: Asset management > Setup > Asset management parameters > Click on Create data wizard.

## 1.6 Telemetry data

At To-Increase we continuously investigate how to improve the user experience of our products; therefore, we will collect application usage data ('telemetry data') from our applications. We will anonymize any personal data and therefore will only use data which cannot be related to individual persons for this purpose. Furthermore, we will delete the telemetry data from our systems after 12 months. If you would like to opt-out, please contact us.

## 1.7 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.

The screenshot displays the 'To-Increase solution management' interface. On the left, a table lists various solutions with their installed versions and status icons. A modal window for 'Advanced Discrete Manufacturing' is open on the right, showing a 'SOLUTION IS NOT INSTALLED' message and a table of licenses.

Solution	Installed version	Status
Advanced Discrete Manufacturi...		×
Advanced Project Management		×
Anywhere Mobility Studio		×
Business Integration Solution	10.0.99.999	☺
Data Entry Workflow		×
Data Modeling Studio		×
Data Quality Studio	10.0.18.2	☺
DynaRent	10.0.28.43	☺
PLM Integration for Engineerin...		×
RapidValue BPM Suite	10.0.26.37	☺
Security and Compliance Studio		×

  

License	Status	Expiry date
Construction	🔒	
Equipment	🔒	
Advanced Project Management	🔒	
Product Engineering a	🔒	

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 for this release

No new features for this release.

## 2.3 New for previous releases

### 2.3.1 New for Advanced Project Management 10.0.28.11 for Dynamics 365 for Operations 10.0

Title	Description
Beginning balances will show up in the invoiced amount	Until now beginning balances are not shown in the invoiced amount field under the invoice and margins tab in the advanced WBS. We now started to show the beginning balances both for Fixed price and time and material projects. The invoiced field will be a summation of beginning balances + progress bill invoiced amounts + fully invoiced project transactions.

field in advanced WBS	In short, any fully invoiced transaction will be a part of the invoiced amount.
-----------------------	---------------------------------------------------------------------------------

**2.3.2 New for Advanced Project Management 10.0.26.10 for Dynamics 365 for Operations 10.0**

Title	Description	
Subcontract design change	Following are the changes done to the subcontracts.	
Action	Existing behaviour	New behaviour
Subcontract is activated	<ol style="list-style-type: none"> <li>It adds a service item to the estimates.</li> </ol>	<ol style="list-style-type: none"> <li>It adds a service item to the estimates</li> <li>All the original estimates that are subcontracted will be deleted.</li> <li>Although the estimates are deleted, we will retain these forecasts against the forecast model SUB for reference purposes.</li> </ol>
<b>Update Quantity</b> button on the subcontract.	This button updates forecast quantity on the subcontract.	As is.
<b>Update PO line</b> button.	<ol style="list-style-type: none"> <li>Updates Purchase order line with the latest values quantity and prices) in the subcontract.</li> <li>Updates the item forecast line with the same information, as in the purchase order lines.</li> </ol>	<ol style="list-style-type: none"> <li>as is</li> <li>as is.</li> <li>Updates the item estimate (service item estimate added after subcontract is activated) with the same cost same as the subcontract rate/value.</li> </ol>
<b>Formulas during PCO/ Draft-Publish</b>	1.Quantity in the estimates will be calculated and changed as per the formulas whenever forecast quantity is modified.	1.Formulas will be inactive, and the latest modified forecast quantity will be defaulted to the service item estimate's qty.

**2.3.3 New for Advanced Project Management 10.0.25.9 for Dynamics 365 for Operations 10.0**

Title	Description
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Project beginning balances has equipment transaction type.	An option to select category = Equipment was introduced in the project beginning balances making it possible to enter lines the equipment transaction types as well.																
Enable Summary & Detail in Project WBS Draft Data Entity	<p>Data entity Project WBS Draft is modified to now accept data for activity type = summary and Detail., in addition to Standard.</p> <p>Please note that this data creation is totally WBS ID driven.</p> <p>For example, Activity type = Summary can contain value = X., then Detail activities should be specified as X.1, X.2 etc., for data to be created correctly.</p> <table border="1"> <tr> <td>000866</td> <td>2</td> <td>Standard</td> <td></td> </tr> <tr> <td>000866</td> <td>3</td> <td>Summary</td> <td></td> </tr> <tr> <td>000866</td> <td>3.1</td> <td>Detail</td> <td></td> </tr> <tr> <td>000866</td> <td>3.2</td> <td>Detail</td> <td></td> </tr> </table>	000866	2	Standard		000866	3	Summary		000866	3.1	Detail		000866	3.2	Detail	
000866	2	Standard															
000866	3	Summary															
000866	3.1	Detail															
000866	3.2	Detail															

### 2.3.4 New for Advanced Project Management 10.0.24.6 for Dynamics 365 for Operations 10.0

Title	Description
Line property is editable	Line property field on the timesheet journals is now made editable.

### 2.3.5 New for Advanced Project Management 10.0.23.5 for Dynamics 365 for Operations 10.0

Title	Description
Added new APM templates to the journal lines.	<p>Added new templates to Hour, Expense, Equipment, and Item journals so that user will have the feasibility to work with mostly used ISV fields readily.</p> <p>You don't have to add them via design each time. Cost code, construction template and equipment fields are added by default with this development.</p>

### 2.3.6 New for Advanced Project Management 10.0.22.4 for Dynamics 365 for Operations 10.0

No new features in this release

### 2.3.7 New for Advanced Project Management 10.0.22.3 for Dynamics 365 for Operations 10.0

No new features in this release

### 2.3.8 New for Advanced Project Management 10.0.21.2 for Dynamics 365 for Operations 10.0

Title	Description
Capability to transfer all the types of projects from quotation to project.	<p>We allow transfer of all the project types from quotation to project.</p> <p>Until today, we allowed only Fixed price and Time and Material projects.</p> <p>For the project types for which project contract is not required, we made the contract greyed-out and the quotation will still allow us to transfer it to the project.</p>

### 2.3.9 New for Advanced Project Management 10.0.18.1 for Dynamics 365 for Operations 10.0

No new features in this release.

However, the equipment functionality is integrated with the standard asset management.

## 2.4 New functional topics considered for this release.

No new functional topics considered for this release.

## 2.5 New functional topics considered for previous releases.

### 2.5.1 **New functional topics considered per release Advanced Project Management 10.0.28.11 for Dynamics 365 for Operations 10.0**

Title	Description
Delete on-account transactions which doesn't have any reference to the invoice proposal.	Until now, you cannot delete an on-account transaction that was generated by a progress bill, even after you delete the invoice proposal. With this change, even though the on-account transaction has a reference to the progress bill, it can be deleted if the associated invoice proposal is no more available. This had been a request from some of our customers lately and this is now addressed with this release.
APM project expense journal templates – redesign	APM Project expense journal has some issues with updating the quantity and fetching the journal line information., which will now publish and fetch correct data. Known issue CS00202755 has been addressed through this.

### 2.5.2 **New functional topics considered per release Advanced Project Management 10.0.26.10 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release.

### 2.5.3 **New functional topics considered per release Advanced Project Management 10.0.25.9 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release.

### 2.5.4 **New functional topics considered per release Advanced Project Management 10.0.24.6 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

### **2.5.5 New functional topics considered per release Advanced Project Management 10.0.23.5 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release.

### **2.5.6 New functional topics considered per release Advanced Project Management 10.0.22.4 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release.

### **2.5.7 New functional topics considered per release Advanced Project Management 10.0.22.3 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release

### **2.5.8 New functional topics considered per release Advanced Project Management 10.0.21.2 for Dynamics 365 for Operations 10.0**

Title	Description
Forecast quantity is minimum one on the projects too.	Forecast quantity is the major factor to calculate bid rate. If the forecast quantity is zero on the project quotation, then bid rate = Bid value/forecast quantity, and in this case, the bid rate is an impossible value. Hence it is already taken as one by default. This behaviour is not there till today for projects. It is introduced for projects too.

### **2.5.9 New functional topics considered per release Advanced Project Management 10.0.18.1 for Dynamics 365 for Operations 10.0**

No functional topics were considered in this release.

## 2.6 Discontinued features for this release

No functional topics were discontinued in this release..

## 2.7 Discontinued features for previous releases

### **2.7.1 Discontinued features per release Advanced Project Management 10.0.28.11 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release..

### **2.7.2 Discontinued features per release Advanced Project Management 10.0.25.9 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release..

**2.7.3 Discontinued features per release Advanced Project Management 10.0.24.6 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.

**2.7.4 Discontinued features per release Advanced Project Management 10.0.23.5 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.

**2.7.5 Discontinued features per release Advanced Project Management 10.0.22.4 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.

**2.7.6 Discontinued features per release Advanced Project Management 10.0.22.3 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.

**2.7.7 Discontinued features per release Advanced Project Management 10.0.21.2 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.

**2.7.8 Discontinued features per release Advanced Project Management 10.0.18.1 for Dynamics 365 for Operations 10.0**

No functional topics were discontinued in this release.



## 3. Fixes summary

### 3.1 Fixes for this release

No bug fixes for this release.

### 3.2 Cumulative fixes from previous releases.

ID	Title
148942	CS00221943 - Create a role and allow associated users to generate and download project change order report. Now advanced WBS manager and advanced WBS admin and clerk will have this option.
149357	CS00221948 - Incorrect Subtotal amount and Invoice amount in Project quotation. There is a partially addressed. Please refer known issues list.
147916	CS00221848 - Unable to submit the PCO changes due to info bar "The require Activity number for Hour forecast is marked in Project" – This is now fixed.
146094	CS00219639 - Issues updating actual cost, posted hours in Advanced WBS.
145748	CS00221413 - Bid values are showing wrong in the Budget tab after changing the bid value for summary
145085	CS00219868 - Description for current forecasts not changed when modified using PCO and is transferred to project
137827	CS00198817 - Cost value for activity and sub project is in correct after change for a subcontract
140255	CS00208979 - Quotation lines must be created with project date which is the activity start date.
142383	CS00212930 – Cost codes are now retained correctly after WBS export or template import.
139267	CS00205534 - Expense timesheets post with different information than what was entered As a part of this fix., resource is shown on the expense journals. Financial dimensions are not overridden. They are merged.
137892	CS00199365 - Additional fields on the Opening balance journal templates. Cost code field is added on the journal lines when opened through Microsoft Excel add-in.
137919	CS00199506 - Construction template is erased on the quotation WBS at the activity level.
137937	CS00199509 - Import of journal lines with APM fields, ignores the APM price setup
137371	CS00187202 - Lookups for Cost code and Equipment fields on Project journals This is an extension that came up with the bug released in previous version., via ID 131232.
137871	CS00199356- Norwegian language doesn't show correct transaction type for Fee on Advanced WBS

131232	CS00187202 - Equipment journal does not fetch all fields when opened in Excel from F&O Note: For the new ISV fields, users will have to go to Design and add them.
133205	CS00190387 - Wrong sorting in Quotation statement
134161	CS00192294 - Project contract ID is erased after template import
134247	CS00192786 - Upload of APM data is failing due to incomplete or missing data entities ProjProjectWBSDraftEntity - Project work breakdown structure – Draft ProjWBSActivityEstimatesEntity - Project work breakdown structure - Draft estimates ProjectsEntity – APM projects.
124424	CS00164917 - Activities added with a PCO are not visible in the tracking view.
124425	CS00164939 - Item forecasts are shown incorrect after the quantity is changed to 0 in PCO
124426	CS00164944 - Wrong validation in PCO, cannot add a second estimate with same hour category
124444	CS00164970 - Cost price is not updated in the current forecast after making changes in the second PCO
123069	CS00159447 - Budget tab on Advanced WBS is showing wrong values for costs and revenue.
123027	CS00159360 - Missing privilege for project inventory

## 4. Known Issues

### 4.1 Known issues.

ID	Title												
125143	Error while posting FA depreciation journal with equipment linked to FA.												
137371	Load ISV fields by default and show lookups for Cost code and Equipment fields on Project journals												
153043	<p>CS00221948 has been addressed with multiple scenarios. But one scenario found during the internal testing turned up as a known issue for this release.</p> <p>Totals are verified on quotations with the below combinations. Scenario 2 is known issue. Rest all got passed.</p> <table border="1"> <thead> <tr> <th>Scenario</th> <th>Test</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Show WBS with units and quantities = True &amp; Use progress billing = True</td> </tr> <tr> <td>2</td> <td>Show WBS with units and quantities = True &amp; Use progress billing = False</td> </tr> <tr> <td>3</td> <td>Show WBS with units and quantities = False Use progress billing will be automatically set to False (This is NA too here.)</td> </tr> <tr> <td>4</td> <td>Show WBS with units and quantities = False., Create some Std WBS data using std WBS.</td> </tr> <tr> <td>5</td> <td>Is standard WBS showing Totals? Has it been verified ?</td> </tr> </tbody> </table>	Scenario	Test	1	Show WBS with units and quantities = True & Use progress billing = True	2	Show WBS with units and quantities = True & Use progress billing = False	3	Show WBS with units and quantities = False Use progress billing will be automatically set to False (This is NA too here.)	4	Show WBS with units and quantities = False., Create some Std WBS data using std WBS.	5	Is standard WBS showing Totals? Has it been verified ?
Scenario	Test												
1	Show WBS with units and quantities = True & Use progress billing = True												
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5	Is standard WBS showing Totals? Has it been verified ?												