staedean

Project control suite 10.0.41.61 for Dynamics 365 for Finance and Operations 10.0

Release Notes

Author: Suraj Cheedella, Product Owner

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Document Information

Title	Project control suite 10.0.41.61 for Dynamics 365 for Finance and Operations 10.0
Subject	Release Notes
Solution Suite	Discrete Manufacturing and construction
Category	Release Notes
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Comments	

1.   Introduction

1.1   Purpose

This document describes the new functionality developed for Project control suite 10.0.41.61 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	
Bug fixes	No	
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	61	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.

1.3   Product release information

Advanced Project Management 10.0.41.61 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.41. 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 10.0.39 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365

version 10.0.41, 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
15/10/2024	10.0.41.61	10.0.39	10.0.41	10.0.39 and above
05/09/2024	10.0.40.60	10.0.39	10.0.40	10.0.39 and above

Note: Why did we change the minimum supported version to 10.0.39? <u>See section 1.4 for more details.</u>

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 validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : Knowledge Base - Support – Staedean

#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, STAEDEAN 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 STAEDEAN will evaluate case by case whether it will honour any requests for fixes which are resulting from Microsoft not backporting fixes as mentioned above. STAEDEAN 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. STAEDEAN 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   PCS Rebranding

We are pleased to announce that **Advance Project Management (APM)** will now be known as **Project Control Suite (PCS)**. This change reflects our enhanced focus on managing and controlling complex project in D365. While the core functionality you rely on remains intact, we have already started to be enhance these areas and our PCS roadmap has expanded to offer even greater value. you'll notice the name **APM** has been replaced with **PCS** in the user interface as well. We're excited about the future of PCS and look forward to supporting your continued success with these improvements.

1.5   Minimum required version to 10.0.39 – Reason.

Problem statement:

Microsoft introduced a breaking change in 10.0.39 which impacts APM solution with Equipment license. The issue is focused on customers on 10.0.39 that use our APM solution and having an Equipment license. If you do not have an Equipment license, you do not experience this issue.

Potential breaking change – Fixed via previous release. 10.0.39.57

If your project contains Equipment type Sales quotation lines and you transfer these to a Project phase, you will get an error stating the following and the entire transfer to Project process will fail.

"The category <XXXX> is mapped to an incompatible transaction type Equipment. This mapping is invalid and would result in corrupted forecast data. To proceed, please add the compatible category to the transaction type."

1.6   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 STAEDEAN 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 Staedean by sending an email to swdist@staedean.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.

1.7   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.

1.8   PCS license coverage

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

Feature	License	Remarks
Project Logistics	PCS I	
Project Inventory	PCS I	
Quotation Statement	PCS I	

Quotation Margins	PCS I	
Project Change Orders	PCS I	
Advanced WBS Sub-projects in Quote WBS WBS template	PCS 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	PCS II	
Equipment	Equipment	
Options and alternatives	PCS II	
Cost codes	PCS II	
Calculation and bid rates	PCS II	
Additional costs	PCS II	
Subcontracting	PCS II	
Progress billing	PCS II	
WBS cost control	PCS II	
Equipment costs and revenue	Equipment	
Timesheets	PCS II	
Pricing via Construction template	PCS II	
Quotation Statement	PCS I	
Quotation Margins	PCS I	
Advanced Project Costing	PCS 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 (PCS I) and Advanced Project Management II (PCS 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.

1.9　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.

1.10   Support for multiple languages

At Staedean, 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 maintenance and service 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.

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.

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 Staedean label file in the English language is TILabel.en-US.label.txt, the new translation in German provided by Staedean 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:

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.

2.   New features

2.1   Common features

Staedean 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 do not 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 expires 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 Staedean 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.

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Feedback

☺ Like   ☹ Dislike

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Thank you for taking the time to send us feedback. Your privacy is important to us. To protect your privacy, please don't include any personal information.

Microsoft Privacy Statement

SESSION INFORMATION

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2024-10-15T14:52:53.015Z

{A8377F06-D7D3-4108-863C-C8FD80FEE9B0}

IIS:APM-SUP-TST2-1

Submit   Cancel

2.2   Feature deprecation effective February 2024

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 is already made available by Microsoft. You can get it from LCS.

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**?

You need to install these licenses based on the SHA256 algorithm.

Please reach out to us at customeroperations@Staedean.com.

After 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.

2.3   New features for this release

Title	Description
Vendor Validation in subcontracting using RFQ	With this new update, you can now validate vendors for subcontracting directly through the **Request for Quotation (RFQ)** process. This added functionality ensures that only approved and suitable vendors are selected before finalizing contracts.
MBOM and EBOM from project logistics	We've made important improvements to the **project logistics** page, allowing you to view both **Manufacturing Bill of Materials (MBOM)** and **Engineering Bill of Materials (EBOM)** along with hyperlink in one place. This enhancement gives you greater visibility into project components, and hyperlink will help to redirect into BOM version simplifying the management of material requirements throughout the entire project lifecycle.
Subcontract progress bill workflow	A new **workflow** for subcontract progress billing is now available, giving you enhanced control over progress payments. This feature enables a more structured approval process, ensuring that payments are made in line with project milestones, delivering greater transparency and control over subcontractor billing.

2.4 New features for the previous release

Title	Description
Synchronous/Asynchronous Project Publish Control	We've introduced a new parameter that allows users to control whether the project publish logic runs synchronously or asynchronously. *Run Project Publish Synchronously/Asynchronously* When this flag is set to ON, the project publish process, including WBS calculations and forecast line generation, will run synchronously in the foreground. This requires users to wait for the process to complete before proceeding. By default, the flag is set to OFF, meaning the publish process runs asynchronously in the background, allowing users to regain control of the system immediately. Navigation: Project management and accounting→Setup→Advanced project management→Advanced project management parameters
Project publish improvements	Improvements made to project publish stability under specific integration scenarios.
Create progress bills for specific data.	You don't have to generate progress bills for all project data or search through your projects or tasks to report progress. With the improved creation process, you can generate progress bills specifically for the data you choose in the advanced WBS.
Fact boxes on Advanced WBS	We introduced project specific data on the fact boxes present in Project > Advanced WBS. From the project WBS, now you can access all the project specific data like subcontracts, change orders, progress bills etc., Apart from this, you can also see the quotation ID from which the project is created, in the fact box in the projects list page.
Added more references	More references have been added between subcontract and purchase order to enhance clarity and understanding. Examples. 1. Every subcontract progress bill now shows purchase order numbers during creation, in the subcontract dropdown. 2. Subcontract progress bills have references for purchase orders. 3. Purchase orders show subcontract IDs in the project tab on the purchase order line. 4. Comments can be added using the comments section in the subcontract progress bills, on the subcontracted activities. They can be seen in the report and the same are shown as comments on the Purchase product receipt as well.
Enhance project publish experience	Project publish experience is all new with this release with the introduction of Async operations that get automatically triggered during the project publish. These async processes are triggered both for project publish and discard.
Batch mode introduction for Run WBS calculation	Run WBS calculation is needed to refresh some values in the work breakdown structure on different tabs. Now, this can be run in the batch.
Cost prices in quotation statement	Users can now see the cost prices in the quotation statement. However the scope is a bit limited to read only for this release. Option to edit the cost price or amend it, fetching the cost price from the WBS instead of project price matrix to align more with APM pricing priority based on quotation statement will be introduced in upcoming releases.
Add filters for equipment selection	Filter based on equipment type is enabled for equipment selection on WBS for quotations projects and change orders. The same is available in project forecasts and journals too.

CS00227303 | Create forecasts in Async mode.	While using task planning from AMPP (Advanced Manufacturing and Project Planning), if tasks are modified, forecasts are not automatically created, and this creates data discrepancy. This was now resolved with automatic creation/updating of forecasts in Asynchronous mode.

2.5   Deprecated functionality.

Id	Description
Create lines button was removed from subcontract progress bill journal lines.	Subcontract journal lines show create lines button that restores the changes done to the subcontract, if required. But is found to be disturbing the posted ones. Hence this button was totally removed. If you now want to restore or revert the changes done to an unposted subcontract progress bill, you may need to delete the journal and create a new one. However, you cannot make any changes to the posted subcontract progress bills. That functionality remains as-is. You can correct the posted product receipts on the purchase order directly.

2.6   Fixes for this release

Id	Description
Compilation Error when Up taking Microsoft Dynamics 365 Version 10.0.41 GA	When upgrading to Microsoft Dynamics 365 version 10.0.41 GA, a compilation error occurs due to a missing data entity, 'FinTag,' in the standard **PurchPurchaseOrderLineV2Entity** under the **PurchLine** data source. The error prevents successful compilation as the referenced entity cannot be found. However, this issue has already been resolved in a previous release (10.0.40.60) and the fix is included in the present 10.0.41.62 release. To avoid the error, ensure to uptake any of the package from STAEDEAN.

2.7 Fixes form previous release

Id	Description
192459	CS00233409	In any journal screen, when opening the activity dropdown menu, the issue of duplicate activities has been resolved/fixed.
195495	Some labels in the quotation to project transfer wizard are not fully shown. This was fixed.
193469	Project forecasts are missing when all forecasts are deleted, and project is published again. This was fixed.
196582	CS00233897 |When a Summary node is created in Project Change Order and transferred to project gets failed with error Value cannot be found on the map- This is fixed.
197422	When we post the progress bill using the progress bill workflow we get error (unable to cast object type). This is resolved/fixed.

3.   Known Issues

3.1   Known issues for this release.

3.2   Known issues from previous releases.

ID	Title
AX-ADM-197585	APP Task planning is not responding/working. In task planning when we try to make changes for task(changing dates, linking the task) it is taking long time to respond.
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.