Upgrade
Guide

Eftsure inside Microsoft Dynamics 365 for F&O

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Contents

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Introduction

This document describes the process of upgrading eftsure inside Dynamics 365 for Finance and Operations.

An upgrade is composed of 2 steps:

Code upgrade: See our Deployment Guide.

Hard refresh on browsers

Data upgrade: list of data upgrade jobs required to align data/configuration with the latest release.

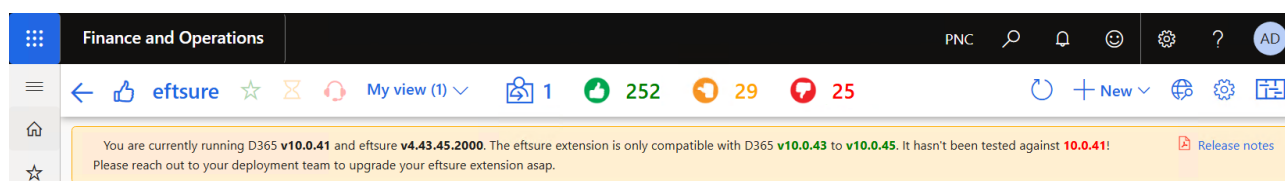Discovery: key user discovers new features and decide to enable/disable.

Code upgrade.

The deployment/code upgrade process consists in downloading the latest eftsure binaries from LCS and installing it on a local developer machine, then UAT then Live environment.

This process is fully described in our Deployment Guide.

Our customers are expected to follow our releases and deploy eftsure inside D365 FO alongside every new major Microsoft release.

When the release plan hasn't been followed accordingly and the current solution is not supported for the version of D365 FO, the following message will appear for all users in the workspace and parameters form:

Hard Refresh

Most releases will likely contain updated scripts or styles. It is required to perform a hard refresh on each user workstation to see the latest changes.

Failure to perform a hard refresh may result in issues, degraded performance or visual appearance.
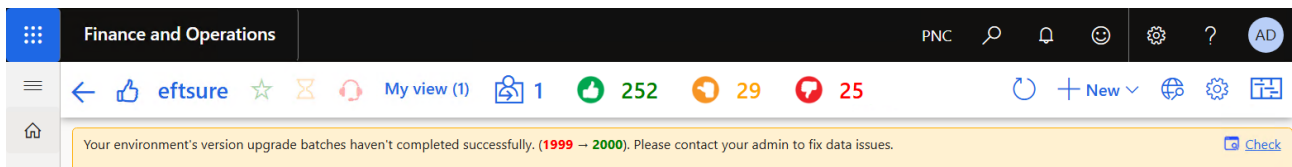
In most cases, hard refresh can be triggered using Ctrl + Shift + R or Ctrl + F5. Alternatively, you can hold down Ctrl and click the Reload button on the browser.

To perform a hard refresh for your specific browser, please search "hard refresh BROWSER on OPERATING SYSTEM".

After hard refresh, styles and scripts should fall back into order.
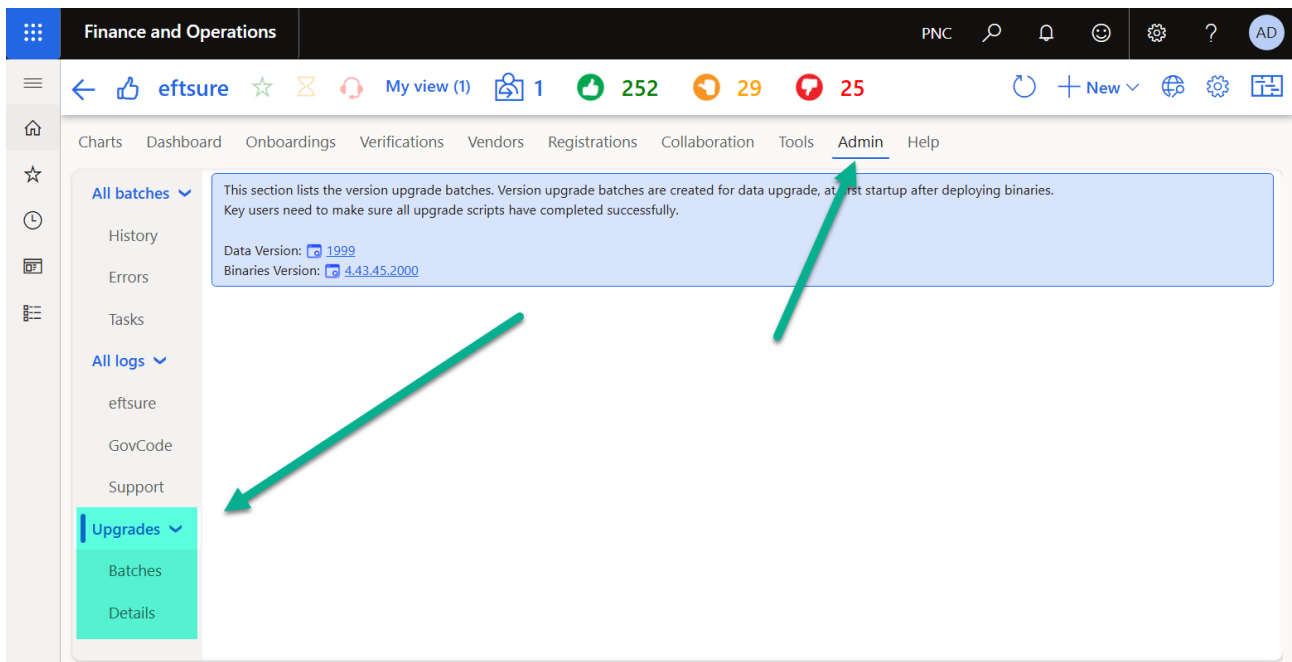
Data Upgrade

When the data upgrade plan hasn't been followed accordingly and the current solution needs data upgrade to complete, the following message will appear for all users in the workspace and parameters form:

Some upgrades may require running additional data scripts to ensure the latest features are turned on or data fixes are applied.

The customer administrator is responsible for ensuring these data jobs ran successfully before releasing access to end-users.

The following section of our workspace is designed to assist the customer administrator in this task:

This section is composed of 3 tabs:

 Upgrades: Show version number details

 Batches: Show the auto generated upgrade batch jobs from the eftsure upgrade monitoring category.

 Details: Shows the batch job history for the above batches and allows the administrator to be notified and run upgrade tasks.

The last 2 tabs are similar to the All batches and All batches > History tabs, filtered on a different monitoring category.

Cross company data sharing

New tables, columns, entities may be introduced in each release. The administrator is responsible for sharing such new columns according our recommendations in our Cross Company Data Sharing – White Paper.

WARNING

Cleaning

The following cleaning tasks run at the beginning of each upgrade:

Remove configuration import / export DMF groups.

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Recreate CCDS policies, Check CCDS configuration for missing fields

Refresh OData and OData actions to the latest release.

Upgrade tasks:

The upgrade tasks can vary depending on the upgrade requirements. Some tasks will turn on opt-in new features while other tasks may run longer data upgrade scripts to ensure the data used by eftsure inside D365FO is always up to date.

Upgrade history

Review the upgrade history in Workspace > Admin > Upgrades > Batches for any errors or steps to complete.

Discovery

Use our Release Notes document to discover the new features included in this release.

Post upgrade tasks

As much as this task is already included in the version upgrade, the eftsure administrator can check configuration for potential configuration issues and fix all warning and errors: