



Checklist

Prevent the most frequent errors during testing by checking all the boxes.

Prior to test update

- Verify e-mail address:** Fill in your current environment, in 'Users', the field 'E-mail address for verification'. This is the address known in Azure Active Directory.

After test update

- Profiles:** Configure the profiles in your test environment and export them. Find how to configure your profiles step by step [here](#).
- Permission sets:** Check and update your permission sets. Then, export the permission sets.
- E-mail number series:** Fill in the e-mail number series in 'Document Capture' settings.
- 3PL setup:** Fill 'SMTP to E-mail TEST' in '3PL setup' to enable sending e-mails while testing.
- Telnet scan emulator:** [Download](#) the new Telnet proxy. In the .cmd-file, enter the correct file location of the telentproxy.exe.
- Print server:** check your print server for messages using SND-PDF and SND-ZPL. Does the location end with 'DIPOST'? Then you must replace this with the new version. The transport location must be: <http://<dnsname>:7676/print>.
- SFTP connection:** Replace your FTP connection for a SFTP connection. You can find this under Document transfer.

Prior to production environment update

- Verify e-mail address:** Fill the field 'E-mail address for verification' (for all active users). This is the address known in Azure Active Directory.

After the update production environment

- Profiles:** Import the configured profiles.
- Permission sets:** Import the updated permission sets.
- E-mail number series:** Fill in the e-mail number series in 'Document Capture' setups.
- 3PL setup:** Fill 'SMTP to E-mail TEST' in '3PL setup' to enable sending e-mails while testing.
- Print server:** Check the print server for messages using SND-PDF and SND-ZPL. The transport location must be: <http://<dnsname>:7676/print>.
- User printer selection:** Update the user printer selection, since these are not automatically copied from your test environment.
- Job queues:** Set the job queue entries on 'Ready'. Checklist

Web Services and Data Integration

- Change URL for web services:**
 - Previously to test update: TEST_XXX (old) to TEST-XXX (new)
 - After update of the production environment: PROD_XXX (old) to PROD-XXX (new)
- Change incoming message in Dynamics:** To send from a web service to DIPost, an extra Header must be added to the request:
SOAPAction = urn:microsoft-dynamics-schemas/codeunit/DIPost:PostXml

