BPC in place update in Mavim

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VERSION	:	3
DATE	:	24/9/2026
STATUS	:	

TABLE OF CONTENTS

1 INTRODUCTION 3
2 Preparation 3
2.1 Get the Microsoft BPC release Excel files 3
2.2 Generate the mapping Excel report from your Mavim database 4
3 Run the update solution 8

1 INTRODUCTION

Microsoft publishes new releases of the Business Process Catalog multiple times a year. The easiest way to get the latest release is to import the full Mavim Import file (the .mtdx). But this means you start (again) with the complete standard catalog. If you have already been working in a Mavim database with the Business Process Catalog and made customizations, you probably can't go back to the out-of-the-box version of the Catalog. For those customers and partners a solution is created to do an in-place update of the Business Process Catalog in Mavim to a new release.

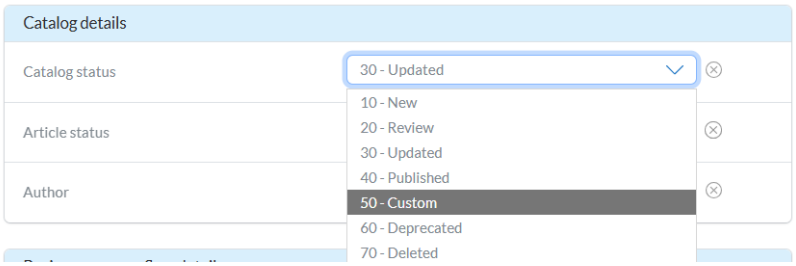
This solution takes the published Excel files (coming from the Microsoft learn site) for a new release of the Business Process Catalog and checks row by row if there is an update or an addition. You can select which fields and topics are updated. To be able to map the generic Business Process Catalog from Microsoft to the 'customized' Business Process Catalog in your Mavim database, you also need to generate a report that holds the mapping of your Mavim topic IDs with the generic Microsoft IDs.

These two Excel files form the input to do the in-place update. The Business Process Catalog consists of 4 tree structures. Each tree structure needs to be updated separately. After uploading the generic Excel file with the latest release coming from Microsoft and the Excel file that is generated from your Mavim database with the mapping of the IDs, you can select what fields are updated. Then the in-place update starts. It first creates the topics in Mavim that are new in this release of the Business Process Catalog. Secondly it does the updates of the fields.

Important: Next to the fields you can select that you want to get updated, in the Business Process Catalog in your Mavim database you can also indicate per topic (per process, scenario, etc.) whether that topic should or shouldn't be updated at all. For instance for processes, scenarios, deliverables, etc. that you have customized, you don't want any updates. This is done using the Catalog status field. By default, this field indicates what the status is for that topic in the last release. For example:

- 10 – New → this topic was added in the catalog in the last release
- 30 – Updated → this topic was updated in the catalog in the last release
- 40 – Published → this topic was not updated in the catalog in the last release

In Mavim you can set the Catalog status field to "50 - Custom". Topics in your Mavim database that have the Catalog status field set to this value are not updated at all by this update solution. The log file will aso mention that no update was done when a topic is found with it's Catalog status value set to "50 - Custom".



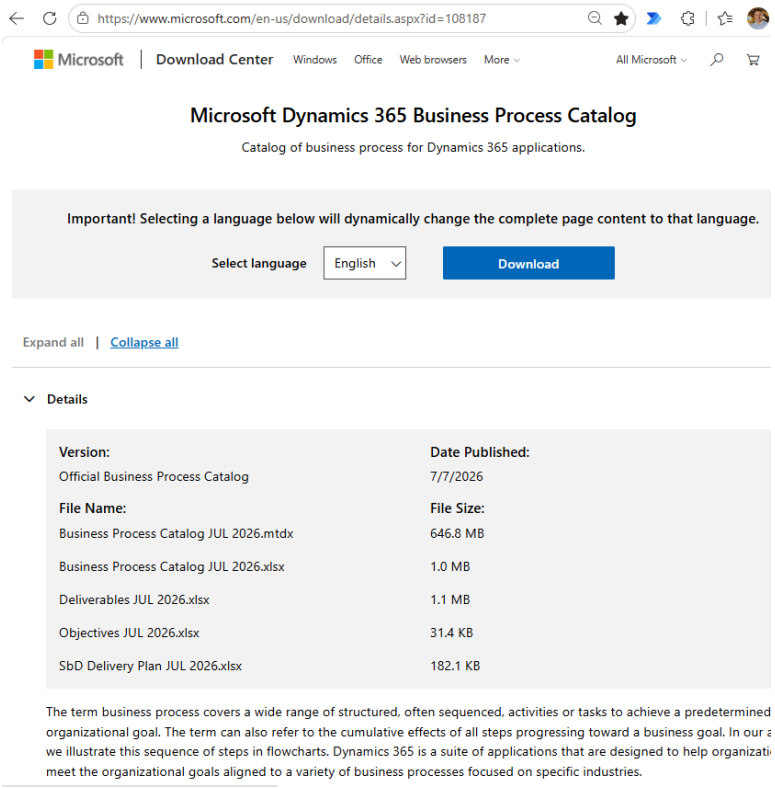
This document describes the integration between Mavim and Azure DevOps. The Power Platform solution described in this document is specifically built for the synchronization of the Microsoft Business Process Catalog structure from Mavim into Azure DevOps.

2 PREPARATION

2.1 Get the Microsoft BPC release Excel files

First you need to get the latest Excel files with the new release of the Business Process Catalog. You can download them from the Microsoft Learn site.

[Download Microsoft Dynamics 365 Business Process Catalog from Official Microsoft Download Center]



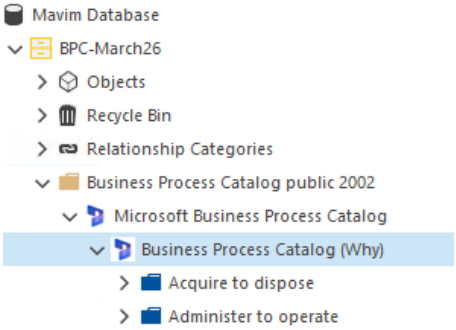
Make sure you download all 4 Excel files

Important: For the Business Process Catalog ….xlsx, after downloading it, make sure you open it and that you sort the entire Excel file on the Process sequence ID column alphabetically. This ensures that all end to end content is aligned from top to bottom. This is important for when the solution needs to figure out in which Process a new Scenario belongs to.

2.2 Generate the mapping Excel report from your Mavim database

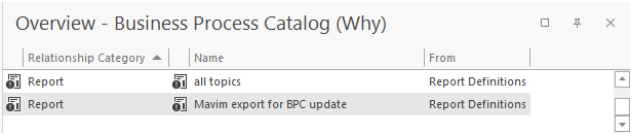
To be able to map the generic Microsoft IDs used in the Business Process Catalog to the Topic IDs in your Mavim database that you want to update, you need to export a report from your Mavim database.

1. Go to Mavim Manager
2. Open the database with the Business Process Catalog you want to update
3. Navigate to the “Business Process Catalog (Why)” topic (this is the parent topic of the End to end processes



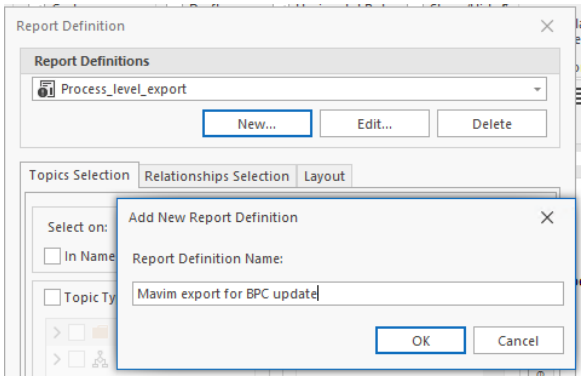
4. If you have created the report called “Mavim export for BPC update” before, then you can just open this report and continue to step 6

a. Existing reports are shown in the Overview section for the selected topic (in the bottom left corner of the screen)

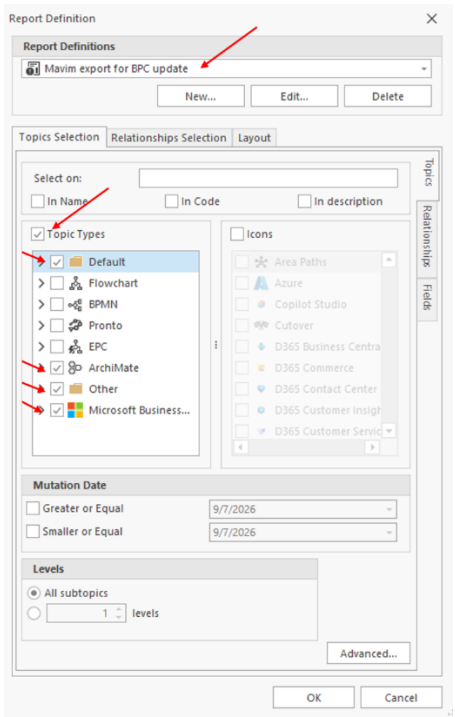


b. If you don't see the Overview section, click on Layout > View > Advanced View

5. If this is the first time you use this update solution, you need to create the Report definition first.
   a. Right mouse click on the "Business Process Catalog (Why)" topic and select "New report"
   b. In the Report Definition screen, click New…
   c. Fill in the name "**Mavim export for BPC update**" and click Ok. This creates a new Report definition



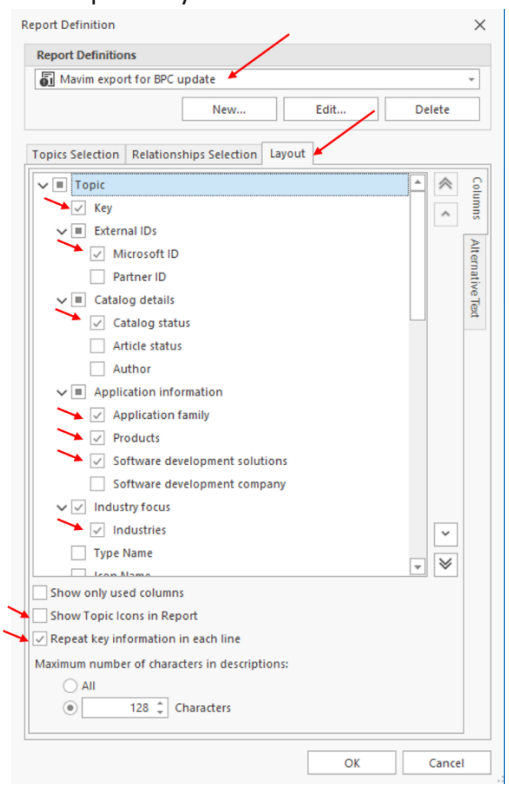
   d. With the new Report Definition selected, in the Topics Selection tab first select the Topic Types checkbox. Now select the following 4 checkboxes. (in some cases the last option, that starts with "Microsoft Business…", is not visible, then only select the 3 checkboxes)



   e. Now click on the Layout tab (it can take a few seconds for this to open)
   f. Make sure the following fields are selected

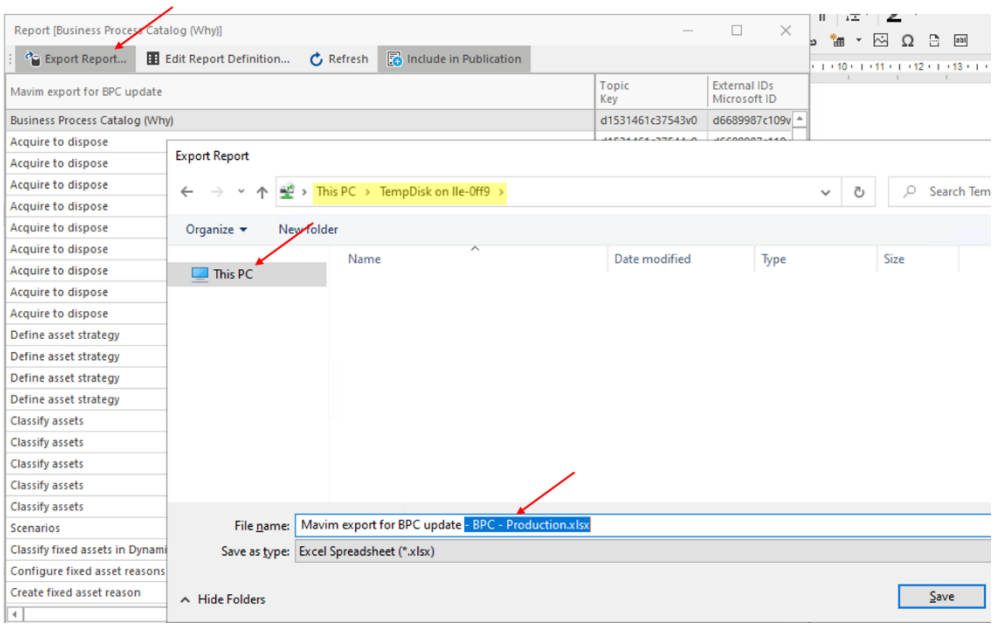
i. Key
ii. Microsoft ID (in External IDs)
iii. Catalog status (in Catalog details)
iv. Application family (in Application information)
v. Products (in Application information)
vi. Software development solutions (in Application information)
vii. Industries (in Industry focus)

g. At the bottom, make sure the “Show Topic Icons in Report” is NOT selected and that the “Repeat key information in each line” IS selected.

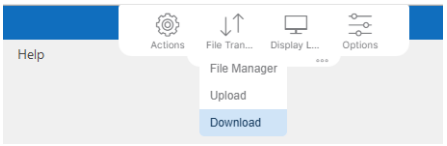


h. Now click on OK to save the Report definition and directly open the Report (building the report can take a minute to load)

6. With the report open, click on Export Report button.
7. Click on “This PC” and then TempDisk to select the temporary disk for saving the Excel file. Any file saved to the TempDisk is automatically downloaded.
8. The proposed filename is the name of the report. Make sure you add a reference to the Tree (like BPC or Deliverables) and a reference to your database name (like Production or Training)



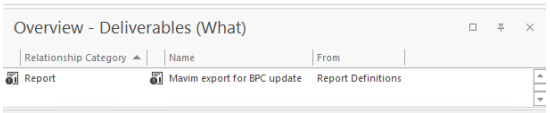
9. Click Save, the Excel file should be downloaded immediately. If it doesn't download, open the File Transfer > Download option at the top of the screen



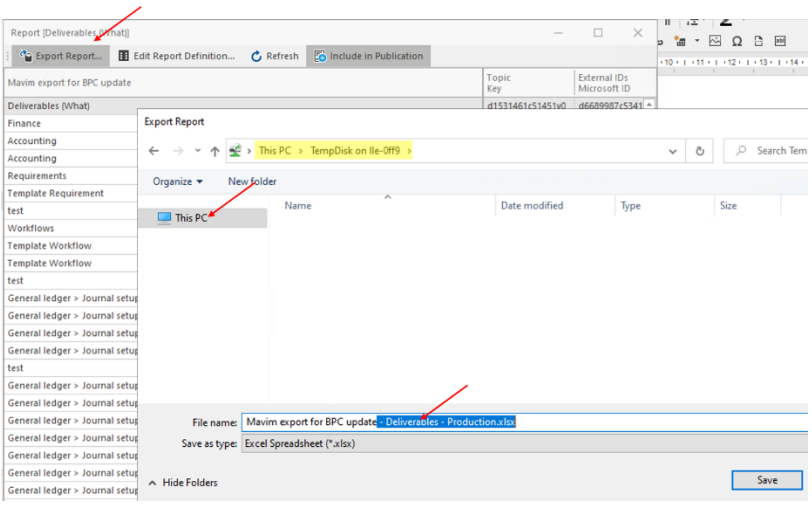
10. Make sure you save the Excel next to the Excels you downloaded from the Microsoft learn site.

If you're updating all 4 tree structures of the Business Process Catalog, you also need to export a similar Report for all Tree structures. Make sure to reuse the Report definition. So, for the next Tree structure the steps are:

1. Navigate to the "Deliverables (What)" topic (or one of the other Tree starting topics)
2. Check if the "Mavim export for BPC udpate" report is already created. If so, open it and continue with step 4



3. If the report is not yet created, right mouse click on the "Deliverables (What)" topic and select New report
    a. In the Report definitions dropdown, select the "Mavim export for BPC update" (so, you're reusing the same report definition!).
    b. Do not make any changes, and just click Ok to open the report.
4. With the report open, click on Export Report button.
5. Click on "This PC" and then TempDisk to select the temporary disk for saving the Excel file. Any file saved to the TempDisk is automatically downloaded.
6. The proposed filename is the name of the report. Make sure you add a reference to the Tree (like BPC or Deliverables) and a reference to your database name (like Production or Training)



7. Click Save, the Excel file should be downloaded immediately. If it doesn't download, open the File Transfer > Download option at the top of the screen

Note: If you check out the Excel files that are generated, you will notice that topics are appearing multiple times. This is correct! This happens because multiple values for fields like Application family and products might exist. Then the topic is mentioned multiple times.

2.3 Perform any manual template updates in Mavim

The "In place update solution" is designed to import and update the content (the topics and fields) in your Mavim database. The solution does not handle any changes or additions around:

- New fields that are introduced in the BPC in Mavim
- New Related categories topics (like new Products, Modules, etc.)
- New diagrams that are added.

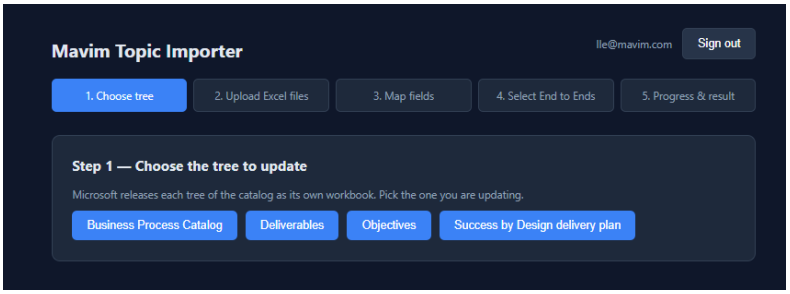
Please visit the What's new or changed in the business process catalog - Dynamics 365 | Microsoft Learn page to find out what 'Mavim Configuration' changes need to be done manually to fully benefit from the new release.

3 RUN THE UPDATE SOLUTION

Now we can start the actual update.

Step 1: Choose tree

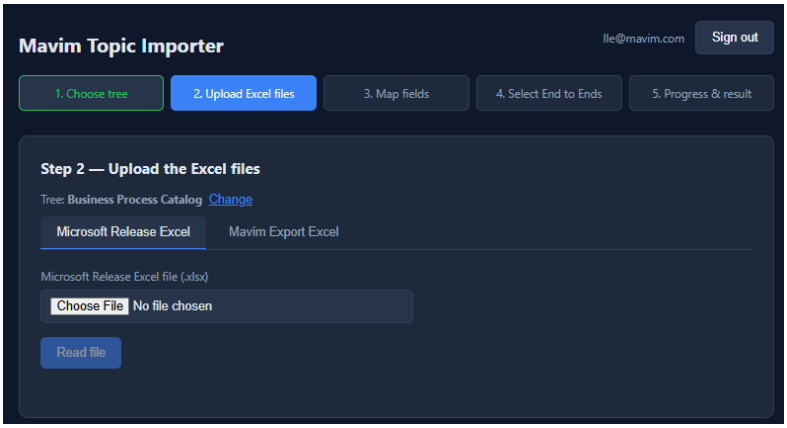
- Navigate to https://bpcsync.mavimcloud.com
- Click on the Sign in button. Make sure you use a user account that has a valid Mavim Improve license and is added to the Mavim database you want to update
- Select the Tree you want to update (in this example we select the Business Process Catalog tree)



Step 2: Upload Excel files

In this step you need to upload the two Excel files.

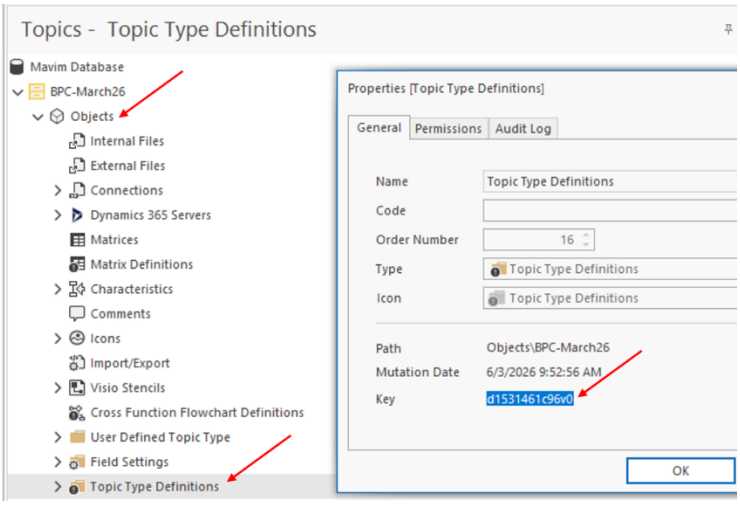
- For the “Microsoft Release Excel”, select the Excel file you downloaded from the Microsoft learn site that contains the new release.
- Click Read file
- For the “Mavim Export Excel”, select the Mavim Report Excel file you downloaded from your Mavim database
- Click Read file



Note: if you’re going to update multiple Tree structure, make sure you select the right Excel files. So, for updating the BPC Tree, make sure you use the BPC Excel with the new release and the BPC Excel with the export from your database.

Step 3: Map fields

- First select the database you want to update (the dropdown show the Mavim Improve databases you have access to)
- Fill in the requested parameters:
    a. Data language → only change this if you have your Mavim database language set to another language then English
    b. Topic Type definitions topic ID (required)
        i. You need to fill in the topic ID for the “Topic Type Definitions” topic in the database you want to update
        ii. Go to Mavim Manager and open this database
        iii. Open the Objects topic (if you don’t see this Objects topic you’re not an administrator in this database)
        iv. Select the topic called “Topic Type Definitions”
        v. Right mouse click on this topic and select Properties
        vi. Copy the Key value and use this for the “Topic Type definitions topic ID” parameter



c. Related categories topic ID (required)

i. You need to fill in the topic ID for the Related Categories topic in the database you want to update

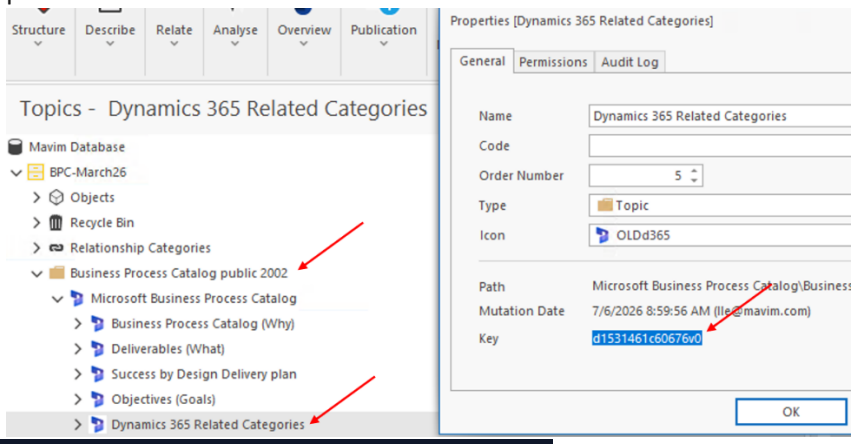
ii. Go to Mavim Manager and open this database

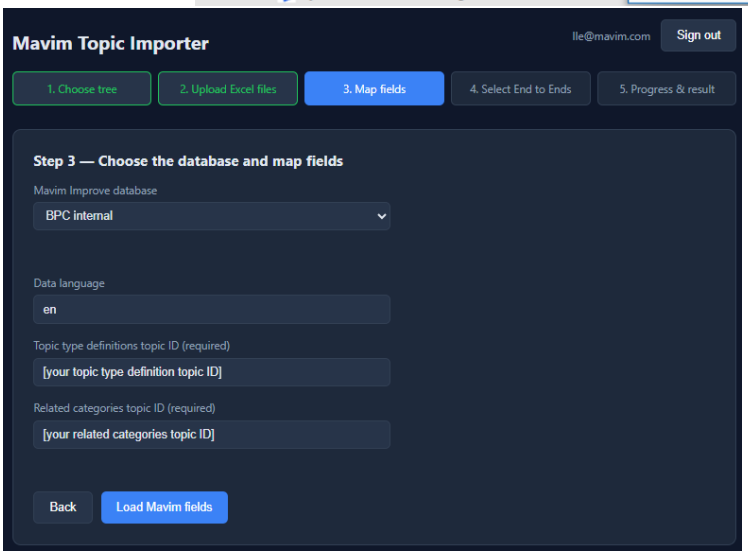
iii. Open the Business Process Catalog structure

iv. Select the topic called “Dynamics 365 Related Categories”

v. Right mouse click on this topic and select Properties

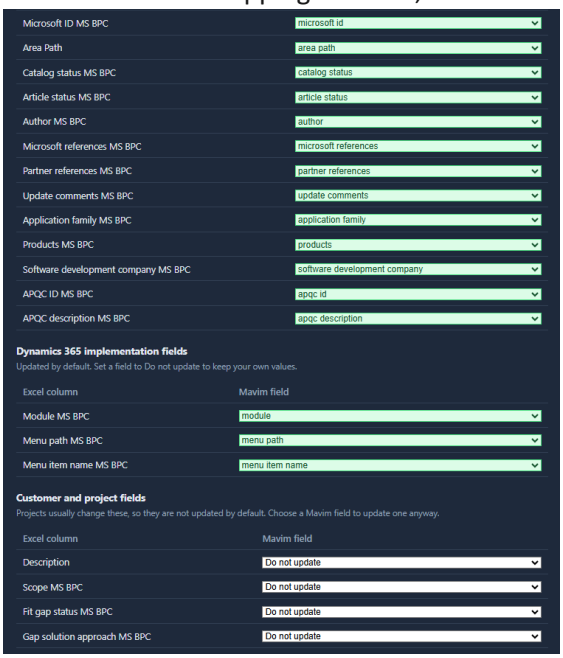
vi. Copy the Key value and use this for the “Related categories topic ID” parameter





- With the parameters filled in, click on Load Mavim fields

- Wait until the fields are loaded
- The solution will map as many fields as possible from the Microsoft Excel file to the fields found in your database.
- Optionally, you can make changes in which fields are being updated. The fields are grouped into 4 sets of fields
    a. **Fields Microsoft maintains**; These fields determine the Business Process Catalog. Normally you would want these fields to be updated
    b. **Dynamics 365 implementation fields**; These fields are specific to the implementation & configuration of your Dynamics 365 environment. If you've made a lot of adjustments in the fields of the Deliverables you might want to check want fields you want to be updated and what fields you do not want to be updated. For any field you don't want to be updated, make sure you change the Mavim field drop down to "Do not update"
    c. **Customer and project fields**; These fields are very likely that you've set custom values for if the database you are updating is used in an implementation project. Therefor these fields are by default set to "Do not update". If you spend time to specify for each process if it is In scope or Out scope, you don't want this field to be updated to the original standard BPC values.
    d. Other columns; The other columns section show all other columns found the Microsoft Excel. The following columns are not part of the Business Process Catalog in Mavim and don't need to be mapped. (ID, Work item type, Title 1 to 8, Assigned to, State, Iteration path)
    e. If you see any other fields, then it is likely that Microsoft has added additional fields since you started using the BPC in Mavim. Check the Appendix to manually fix any missing fields in your Mavim database.
- With all the field mapping checked, click on Continue to End to end selection

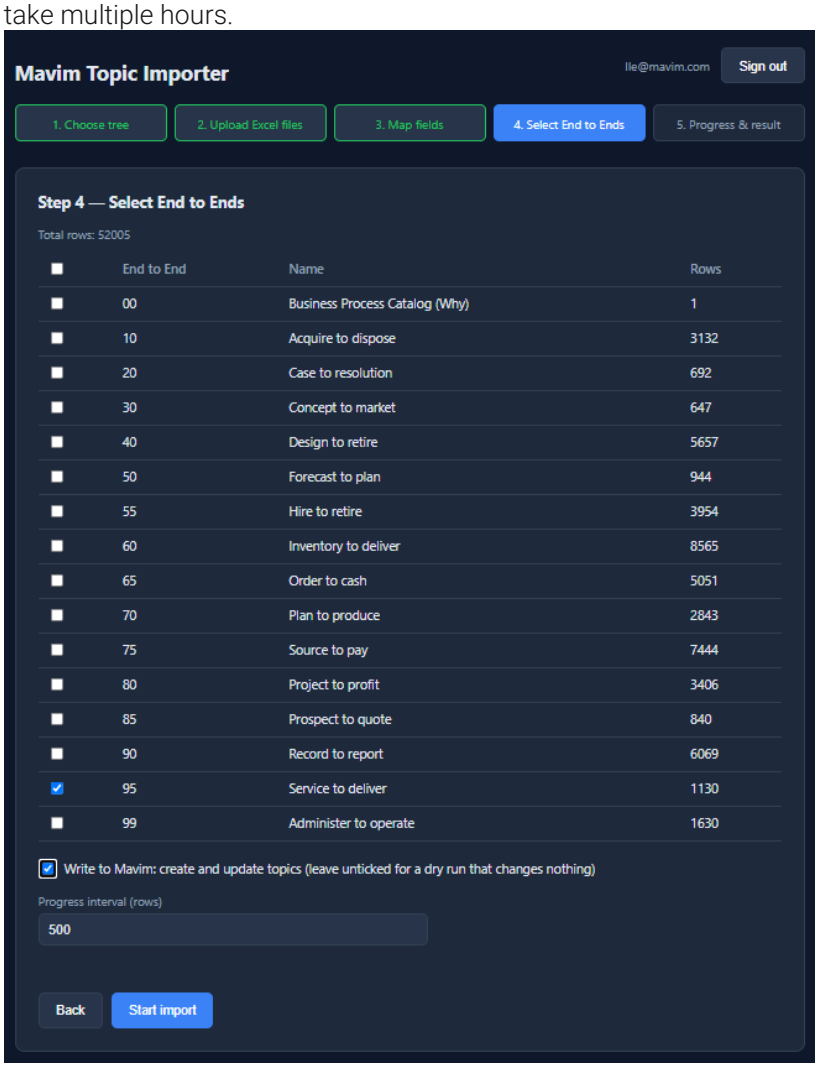


Step 4: Select End to Ends and summary of what gets updated

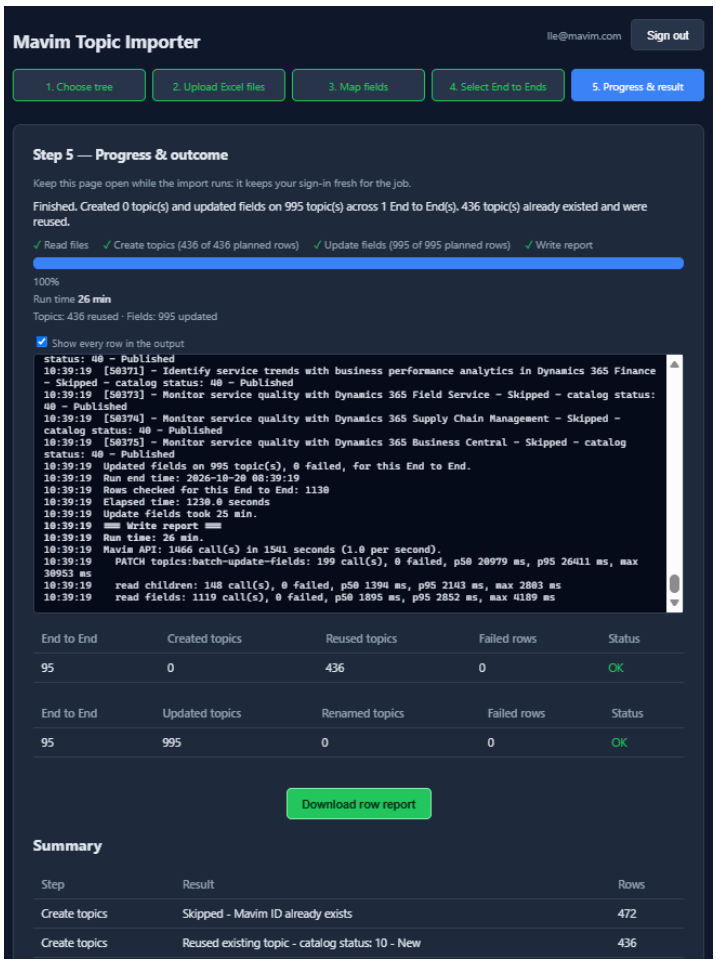
For the BPC Tree it is possible to select which End to end processes you want to synchronize. For the other Tree structures the step 4 just shows the option to start the actual update process. Once started, a progress bar is shown and the output screen shows what the solution is doing.

Make sure the checkbox is checked to actually create the topics. A confirmation message is shown after clicking Start import

The actual updating is done in two phases. First, it loops through the Release Excel file and creates new topics for rows that are indicated with Catalog status '10 - New'. Secondly, it loops through the Release Excel and updates the topics if the Catalog status is '10 – New' or '30 – Updated'. Depending on the amount of rows in the provided BPC release Excel file, this process of creating and updating Mavim can take multiple hours.

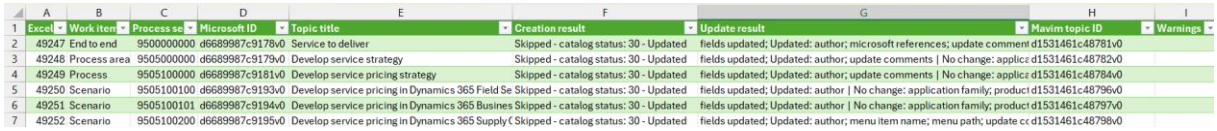


After the import is finished the BPC update solution shows a summary of the created and updated topics.



The solution also generates an Excel file that details per row in the BPC release Excel what the solution did:

- Did it create the topic in Mavim or not
- Did it update the topic in Mavim or not
- What fields got updated
- What is the (new) Topic ID in Mavim



	A	B	C	D	E	F	G	H	I
1	Excel	Work item	Process se	Microsoft ID	Topic title	Creation result	Update result	Mavim topic ID	Warnings
2	49247	End to end	9500000000	d6689987c9178v0	Service to deliver	Skipped - catalog status: 30 - Updated	fields updated; Updated: author; microsoft references; update comment	d1531461c48781v0	
3	49248	Process area	9505000000	d6689987c9179v0	Develop service strategy	Skipped - catalog status: 30 - Updated	fields updated; Updated: author; update comments | No change: applic	d1531461c48782v0	
4	49249	Process	9505100000	d6689987c9181v0	Develop service pricing strategy	Skipped - catalog status: 30 - Updated	fields updated; Updated: author; update comments | No change: applic	d1531461c48784v0	
5	49250	Scenario	9505100100	d6689987c9193v0	Develop service pricing in Dynamics 365 Field Se	Skipped - catalog status: 30 - Updated	fields updated; Updated: author | No change: application family; product	d1531461c48796v0	
6	49251	Scenario	9505100101	d6689987c9194v0	Develop service pricing in Dynamics 365 Busines	Skipped - catalog status: 30 - Updated	fields updated; Updated: author | No change: application family; product	d1531461c48797v0	
7	49252	Scenario	9505100200	d6689987c9195v0	Develop service pricing in Dynamics 365 Supply C	Skipped - catalog status: 30 - Updated	fields updated; Updated: author; menu item name; menu path; update cc	d1531461c48798v0	