

# Release Notes for Data Entry Workflow 10.0.32.9

Release Notes

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# Document Information

Title	Release Notes for Data Entry Workflow 10.0.32.9
Subtitle (Subject)	Release Notes
Solution Suite	DEW; Data Entry Workflow
Category	Release Notes
Author	Marius Rusu
Published Date	4/1/2023
Status	Final
Comments	[Comments]

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# 1. Introduction

## 1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.32.9 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.25 and higher.

## 1.2 Audience

This document is intended for new users of Data Entry Workflow partners and customers. Some knowledge of Dynamics 365 for Finance and Operations is assumed.

## 1.3 Deliverables

Deliverable	Description
<b>Solution package</b>	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
<b>Software deployable package</b>	Data Entry Workflow 10.0.32.9
<b>Release notes</b>	This document is provided with the Data Entry Workflow product deliverables.
<b>Implementation methodology</b>	The solution package contains a <i>Data Entry Workflow implementation methodology</i> that provides detailed step-by-step instructions on how to install, learn, and implement the solution.
<b>Getting started BPM library</b>	The solution package includes a <i>Getting started with Data Entry Workflow</i> BPM library. This library contains several task guides that showcase some of the key capabilities of Data Entry Workflow.
<b>Documentation BPM library</b>	We are working on the documentation for <i>Data Entry Workflow</i> . This is not published as BPM library on the moment of this release.
<b>Authentication assets</b>	A To-Increase security certificate is provided to allow trusted installation of the provided model files and ISV license files.

## 2. What's New

### 2.1 Current release

#### 2.1.1 Certificate renewal

The security certificate, that expires every 3 years, ensures that our customers have valid To-Increase software installed and not an unlicensed copy. This digital check is executed during installations and upon installing the license files, ensures that they have legitimate software installed. The previous security certificates for To-Increase solutions would expire on June 9, 2023.

This release (and releases beyond) contains the new certificate and a new feature within the Solution Management Workspace. 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.

#### 2.1.2 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.

As of 7<sup>th</sup> April 2023 we do support the Data entry workflow 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 in 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:

DEW.en-us.label.txt  
DEW.da.label.txt  
DEW.de.label.txt  
DEW.es.label.txt  
DEW.fr.label.txt  
DEW.it.label.txt  
DEW.nb-NO.label.txt  
DEW.nl.label.txt  
DEW.pt-PT.label.txt  
DEW.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.

### **2.1.3 Enhanced duplicate check logic.**

In previous versions, the duplicate check flag on a step would only enable the integration with Data Quality Studio and use its duplicate check functionality. With the current version, we are extending the duplicate functionality to check for duplicates within the 'In progress' workflows as well. Therefore, when the duplicate check is enabled on a step, the following validations will be executed:

- Check whether the data entered exists in the target tables based on its primary key.
- Run DQS duplicate check rules against target tables.
- Check whether the data entered exists in an ongoing workflow based on the table's primary key.
- Use the DQS defined duplicate check policies to check whether the data entered exists on any ongoing workflow.

### **2.1.4 Added support for 'Generic' virtual fields**

The concept of Virtual field was added a while ago to support various scenarios like having Picture or Document fields in the template or to store and handle product attributes. However, with the current version it will be possible to add a 'Generic' virtual field that can be used in various scenarios like passing custom information between data participants, using the Write condition to control whether data needs to be written to target tables etc.

To add a virtual field, you need to select the field group in which you want to add it and use the new Add > Virtual field option.

Data entry workflow templates | Standard view

### 000051 : Create customer (organization)

Edit Refresh Select fields

```

    graph LR
      A[Customer details] --> B[Financial details]
      B --> C[Approval]
  
```

Workflow: 000051, Version: 8

Steps

+ Add - Remove ↑ Move up ↓ Move down

- Customer details
  - Details
  - Address
  - Contact information
  - VAT
- Financial details
  - Credit limit
  - Various
  - Default dimensions
- Approval
  - Details
  - Address

Details

+ Add - Remove Duplicate ↑ Move up ↓ Move down

Fields

Field from document	Record
Visual field	CountryRegionId
Document attachment field	LogisticsPostalAddress
Picture field	LogisticsPostalAddress
LogisticsPostalAddress	CountryRegionId
LogisticsPostalAddress	ZipCode
LogisticsPostalAddress	Street
LogisticsPostalAddress	City
LogisticsPostalAddress	State
LogisticsPostalAddress	County

Field name: CountryRegionId

Extended data type name: LogisticsAddressCountryRegionId

Enum: \_\_\_\_\_

Length: 10

Mandatory:  Yes

Title field:  No

Non-editable:  No

Default value: \_\_\_\_\_

Lookup button: Auto

LABEL: Country/region Overwrite

HELP TEXT: \_\_\_\_\_

On the dialog that appears, you can select the document record on which the field needs to be added and all of its properties that as illustrated below:

?

### Add virtual field

---

**Details** ^

**GENERAL**

Document record

Field name

Type

Mandatory  
 No

Write condition  
 No

Extended data type

Label

Help text

---

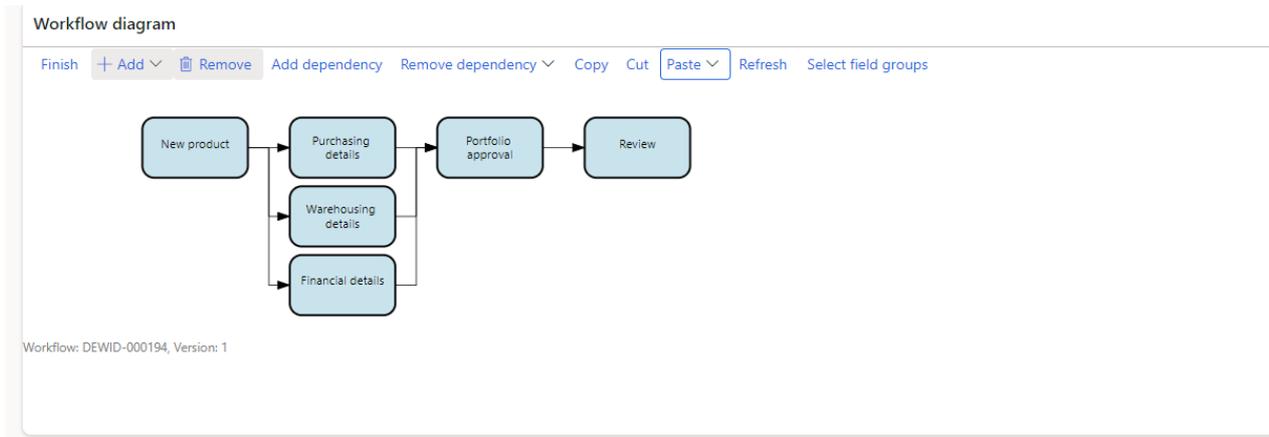
### 2.1.5 Data entry workflow step design enhancements

Defining a workflow is much easier if you have a visualisation of the step sequence. For that, we have introduced in past versions a visualisation control to show the workflow structure. However, the diagram had limited functionality and the step definition was still done in the tree view control below the diagram. This made it a bit hard for steps to be added or more importantly moved across the workflow.

Therefore, with the current version we have brought some enhancements to the diagram by moving the step related defining operations above the diagram. When the diagram is in Edit mode, the following operations are now possible:

- a. The ability to add/remove steps.
- b. The ability to change dependencies (Add or remove them).
- c. The ability to Cut/Paste a step within the same workflow.
- d. The ability to Copy a step.

Also, as part of the change we have also updated a bit the dimensions of the diagram shapes and the space between them to make the more user friendly and enhance the form navigation.



### 2.1.6 Enhanced lookups

We have 2 scenarios where we enhanced the workflow execution lookup experience.

1. When working with custom fields added in D365 using the Custom fields framework, we can have a predefined list of values for a custom field. When this is used, we are now showing these values in the lookup. This will now have the look and feel of a standard field that is based on an Enum field.
2. The lookup of a party name will now use the standard Party lookup form – similar to how the lookup works on standard forms (e.g. standard customer creation).

### 2.1.7 Primary key indicator on workflow document records

We have now added an indicator for the primary key fields of a document record. The indicator is added in 2 places:

1. On the workflow document record.

Line number	Field name	Ax field name	Parent field	Mandatory	Write cc
1.0000000000	Itemid	Itemid	DisplayProductNumber		
2.0000000000	NameAlias	NameAlias			
3.0000000000	dataArealid	dataArealid			
4.0000000000	Product	Product	RecId		
5.0000000000	CostModel	CostModel			
6.0000000000	PrimaryVendorId	PrimaryVendorId			
7.0000000000	ItemBuyerGroupId	ItemBuyerGroupId			
9.0000000000	PdsVendorCheckItem	PdsVendorCheckItem			
10.0000000000	NetWeight	NetWeight			

2. On the manual field selection when we are adding fields manually to the document record

Standard view ▾

### Select fields

Select all Deselect all fields Select mandatory

Table name  Show system fields  No Show inherited fields  Yes

↻	Selected	Field name	Mandatory	Type	⋮
🔒	<input type="checkbox"/>	PhysDimId	<input type="checkbox"/>	String	▾

### 2.1.8 Field picker small redesign

We have made some small redesign of the Field picker form to align the labels and improve visibility about the step that is going to hold the fields selected.

Select fields ×

**Data entry workflow template** Selected field group

Create customer (orga... Address

**Step**

Customer details

Selected fields

Select fields Delete

○ Data source name	Name	⋮
○ LogisticsPostalAddress	Country/region	
LogisticsPostalAddress	ZIP/postal code	
LogisticsPostalAddress	Street	
LogisticsPostalAddress	City	
LogisticsPostalAddress	State	
LogisticsPostalAddress	County	

## 3. Bug Fixes

### Internal

- Conditions were not migrated correctly during workflow migration
  - Fix: When importing a data entry workflow template, we are now also creating the conditions.
- Workflow category is not a global table
  - Fix: we have made the table shared across all companies and disabled the Unique index so that no primary key violations are encountered during installation. We also created a script to clean out duplicates afterwards. To remove duplicates you need to run the following runnable class: DewClearWorkflowCategoryDuplicates
- Workflow labels is not a global table
  - Fix: we have made the table shared across all companies and disabled the Unique index so that no primary key violations are encountered during installation. We also created a script to clean out duplicates afterwards. To remove duplicates you need to run the following runnable class: DewClearConfigurableLabelDuplicates
- Combo box fields are not respecting the Non-Editable property on the workflow field
  - Fix: We have added a fix that will correct this behaviour

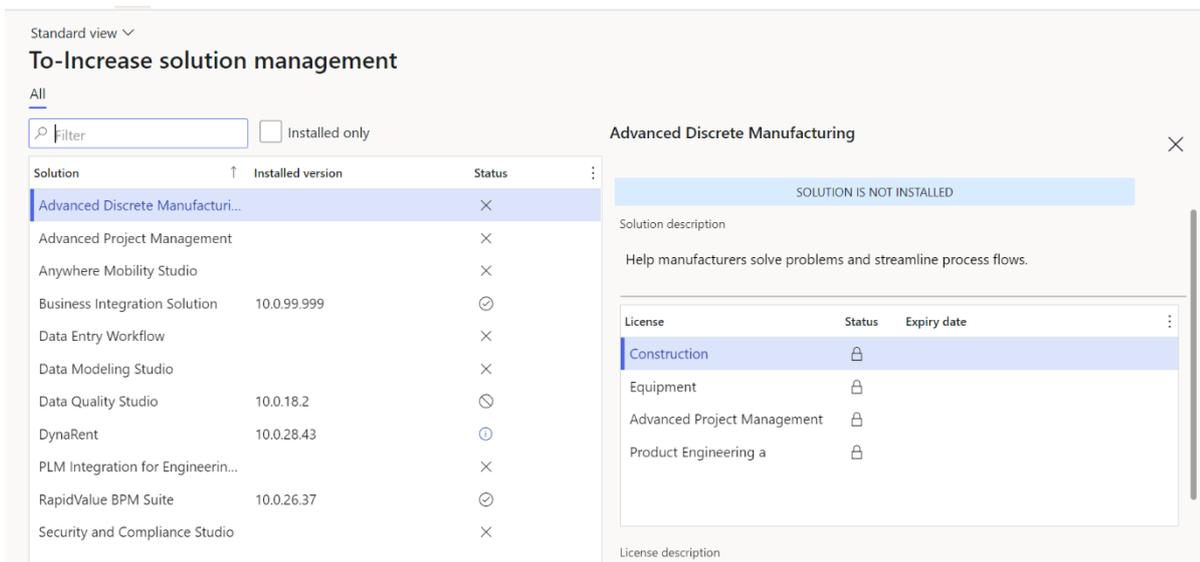
## 4. Common features

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 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.



The screenshot displays the 'To-Increase solution management' interface. On the left, there is a list of solutions with columns for 'Solution', 'Installed version', and 'Status'. The 'Advanced Discrete Manufacturing' solution is highlighted. On the right, a modal window titled 'Advanced Discrete Manufacturing' is open, showing a 'SOLUTION IS NOT INSTALLED' message and a table of licenses.

Solution	Installed version	Status
Advanced Discrete Manufacuri...		×
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

## 5. Known Issues and limitations.

In this section the known issues and limitations that are currently in DEW will be highlighted. These issues or limitations can also be due to standard Dynamics 365 limitations. Known issues and limitations:

- User can setup alerts as notifications. A data entity to continue with data outside of Dynamics 365 is not available yet.
- Diagram operations can sometime lead strange arrangement when complex scenarios are performed. If you ever get into a situation where the diagram is not looking correct, we suggest you remove the dependencies and then use Cut & Paste function to move the steps in the order that you prefer.

We have items on the roadmap that will improve the product. If you want to learn about upcoming features, you can contact To-Increase.

In general, the Data Entry workflow can work for any regular table and field, regardless if it is part of the standard, an ISV solution, customization or configured custom field. We have concentrated our testing on master data entry: Customers, (Released) Products, Vendor and Vendor bank accounts. We did test some other tables as well. If there is any specific behaviour which needs attention to get the recording or processing better for your scenarios, please contact us so we can improve the solution.

Together with the solution, we provide sample data entry workflow templates. The tutorials are provided 'as-is' and not supported as part of the main application. The examples are mainly intended for learning and demo purposes. Before using them in a production environment, you must verify if they will work as per your expectations.

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via To-Increase support.