

---

# Release Notes for Data Entry Workflow 10.0.34.10

Release Notes

# Table of Contents

- 1. Introduction .....4
  - 1.1 Purpose ..... 4
  - 1.2 Audience ..... 4
  - 1.3 Deliverables..... 4
  - 1.4 Product Release information ..... 4
- 2. What’s New .....6
  - 2.1 Current release ..... 6
    - 2.1.1 Workflow execution field history..... 6
    - 2.1.2 Approve audit ..... 6
    - 2.1.3 Reference document records ..... 7
    - 2.1.4 Enhanced field picker functionality for workflow templates ..... 8
    - 2.1.5 Added Online Help shortcut to Data entry workflow forms. .... 9
- 3. Bug Fixes .....10
- 4. Common features .....11
- 5. Known Issues and limitations. ....13

# Document Information

Title	Release Notes for Data Entry Workflow 10.0.34.10
Subtitle (Subject)	Release Notes
Solution Suite	DEW; Data Entry Workflow
Category	Release Notes
Author	Marius Rusu
Published Date	7/3/2023
Status	Final
Comments	[Comments]

© Copyright To-Increase 2023. All rights reserved.

The information in this document is subject to change without notice. No part of this document may be reproduced, stored or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of To-Increase B.V. To-Increase B.V. assumes no liability for any damages incurred, directly or indirectly, from any errors, omissions or discrepancies between the software and the information contained in this document.

# 1. Introduction

## 1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.34.10 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.29 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 10.0.34.10
<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.

## 1.4 Product Release information

*Data entry workflow 10.0.34.10 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.29. 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 10.0.29 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.34, 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-Product]	[TI-Version number]	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
01/04/2023	10.0.32.9	10.0.28	10.0.32	10.0.28 and above
05/07/2023	10.0.32.10	10.0.29	10.0.34	10.0.29 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase 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 - To-Increase](#)

## 2. What's New

### 2.1 Current release

#### 2.1.1 Workflow execution field history

When a field is changed multiple times during a data entry workflow execution, the only option to check the history of that field was by going to the workflow history > Field values > History. This is quite lengthy process that almost no one takes although this could be an important task especially in approval steps.

To address this, we have now added a 'Field history' button that will appear next to each field that has been changed multiple times.

The screenshot shows the 'Customer Groups' details page for '10021, New value1'. The 'Description' field is set to 'New value1'. A 'Field history' button is visible next to the field. Below the field, a table titled ''Description' Field value history' shows the following data:

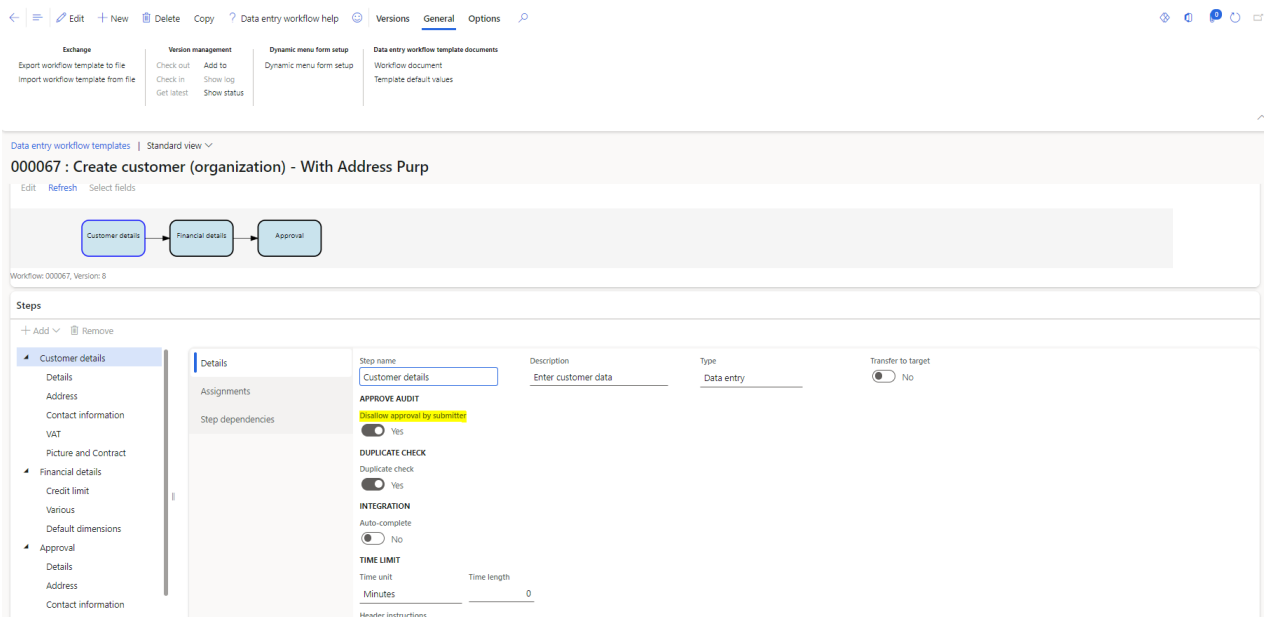
Value	User	Date/Time
New value1	Marius.Rusu	5/2/2023 9:44:20 AM
New value	Marius.Rusu	4/21/2023 8:47:16 AM
check field history new	Marius.Rusu	4/20/2023 5:53:51 AM
check field history	Marius.Rusu	4/20/2023 5:53:12 AM

#### 2.1.2 Approve audit

During the data entry stage of a workflow execution, it is common that a team is responsible for creating records in certain area (e.g Products , customers etc). This includes both data entry and approval of the data. Until now, if all of the steps were assigned to a team or role, one member of that team was able to start a data entry workflow and complete it without the contribution of any other member. If the workflow has an approval step then the member who submitted the data was also allowed to approve the data he submitted.

For scenarios where this behaviour needs to be prevented, we have now introduced the option to enable an Approve audit logic. If enabled, users that are contributing to the record during the data entry steps, will not be assigned with the Approval step, hence they will not be able to approve their own data.

Therefore, on each workflow step of type 'Data entry', the Approve audit can be turned on or off.



For small teams, it is possible that all users contribute to the data entering process, leaving no one available for data approval. To overcome this scenario, we have added a 'Final approver' field on the 'Approval' type steps. This user will be assigned with the approval step if no user defined in the Assignments tab will be able to approve the data due to the Approve audit logic.

### 2.1.3 Reference document records

Some tables have fields that hold record references from other tables. These are generally known as reference fields. In some cases, the reference fields cannot be dynamically added to the Data entry workflow wizard because of the way their underlying Extended data type is defined. For example, if we need to specify an address purpose for an address, we need to use a reference field that displays all available purposes defined in D365.

Because of the way the Address purpose field is defined we were not able to display it dynamically on the wizard form. To address this, we have introduced the concept of Reference document.

On the Workflow document, we can now manually add a document record for a table and flag it as Reference record. Document records marked as reference records will be skipped during the Transfer to Target process. Instead, if fields from these document records are added to the data entry steps, the values will be used to identify a record from the table. Then, the record reference(RecId) can be set as a parent field for any other fields from other document records.

Standard view ▼

### Workflow document

**General**

Document: 000092      Number sequence: \_\_\_\_\_

---

**Record**

+ Add line   Remove   Initialize   ↑ Move up   ↓ Move down   Table browser

Record

- LogisticsLocation\_LogisticsPosta...
- DirPerson
- DirPersonName
- LogisticsPostalAddress
- TaxVatNumTable
- CustTable
- MCRCustTable
- DirPartyLocation\_LogisticsPosta...
- LogisticsLocation\_ContactInfor...
- DirPartyLocation\_ContactInfo
- LogisticsElectronicAddress\_Pho...
- LogisticsElectronicAddress\_Fax
- LogisticsLocationRole
- DirPartyLocationRole
- LogisticsElectronicAddress\_Email

Record: LogisticsLocationRole      Record table: LogisticsLocationRole      Join mode: InnerJoin

Reference record:  Yes

**Fields**   Range

**Details**

+ Add field   Remove   Select fields   Initialize   ↑ Move up   ↓ Move down

Line number	Field name	Ax field name	Parent field	Mandatory
1.0000000000	Name	Name		✓
2.0000000000	Recid	Recid		

Standard view ▼

### Workflow document

**General**

Document: 000092      Number sequence: \_\_\_\_\_

---

**Record**

+ Add line   Remove   Initialize   ↑ Move up   ↓ Move down   Table browser

Record

- LogisticsLocation\_LogisticsPosta...
- DirPerson
- DirPersonName
- LogisticsPostalAddress
- TaxVatNumTable
- CustTable
- MCRCustTable
- DirPartyLocation\_LogisticsPosta...
- LogisticsLocation\_ContactInfor...
- DirPartyLocation\_ContactInfo
- LogisticsElectronicAddress\_Phone
- LogisticsElectronicAddress\_Fax
- LogisticsLocationRole
- DirPartyLocationRole
- LogisticsElectronicAddress\_Email

Record: DirPartyLocationRole      Record table: DirPartyLocationRole      Join mode: InnerJoin

Reference record:  No

**Fields**   Range

**Details**

+ Add field   Remove   Select fields   Initialize   ↑ Move up   ↓ Move down

Line number	Field name	Ax field name	Parent field	Mandatory
1.0000000000	LocationRole	LocationRole	Recid	LogisticsLocation... ✓
2.0000000000	PartyLocation	PartyLocation	Recid	DirPartyLocation_Lo... ✓

### 2.1.4 Enhanced field picker functionality for workflow templates

While selecting fields for a workflow template the field picker’s in-built functionality for creating the workflow document had some problems and manual intervention was sometimes needed. In some scenarios, the Field picker would override the relations and documents already present in a workflow document. This was annoying especially because the templates provided by To-Increase were not ‘amendable’ using the field picker as the document records relations would have got misconfigured. To address these issues, we have performed several enhancements to the Field Picker logic:

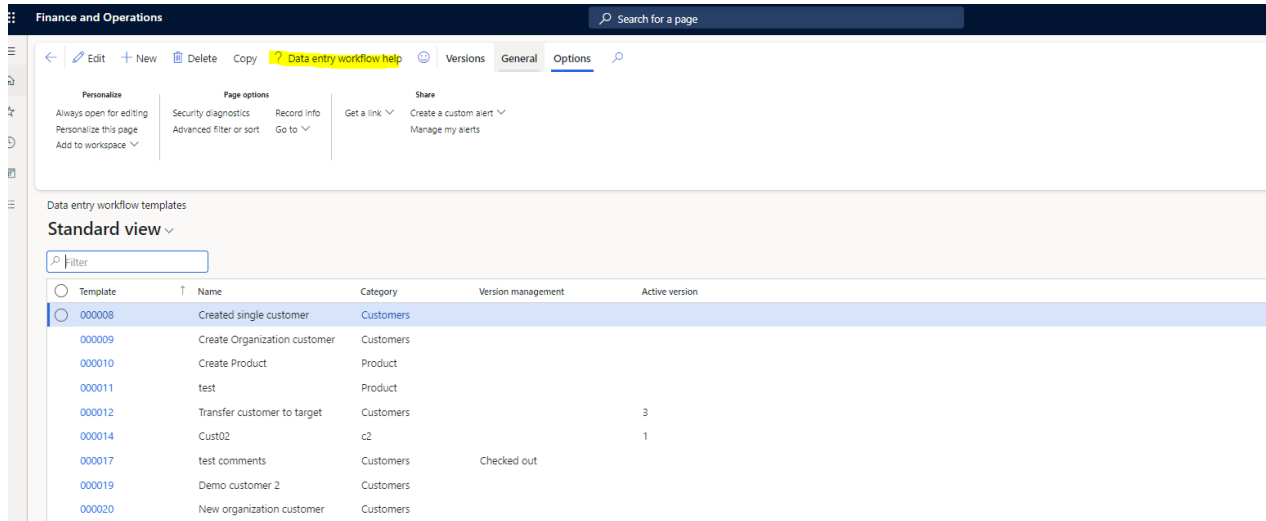
- a. The field picker will not override any relations on document records that already exist in the workflow document. Therefore, for the templates provided by To-Increase, you should be able to record new fields without the fear of breaking the relations.



- b. The data sources that have an Exist join relation on the form will not be added to the workflow document any longer.
- c. Recording fields from Released products page and related pages(category, translations, Default order settings)now has some better logic that will create the relations between records correctly. Manual intervention may still be needed varying on the complexity of the template.

### 2.1.5 Added Online Help shortcut to Data entry workflow forms.

Like for our other products, we have now added a quick way to reach our online documentation.



## 3. Bug Fixes

### Internal

- Send master data from DEW not working correctly because the process starts before all data is correctly saved.
  - Fix: In the multi-table scenario (e.g customer + address) the Send MDM data logic is executed after all records are transferred to their target tables.
- Not able to add product attribute if it is already available in the workflow document.
  - Fix: If a product attribute is already present in the workflow document, then adding it to the workflow template step via the Add product attributes screen is now possible.
- “Company does not exist” error when entering a value for the Item model group.
  - Fix: The logic executed when a field is modified has been enhanced to address multiple scenarios, including this one.
- Product creation template – Various issues identified during the pick fields process have been identified and fixed.

## 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.

Standard view ▾

### To-Increase solution management

All

Filter   Installed only

Solution	Installed version	Status
Advanced Discrete Manufacturi...		×
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		×

#### Advanced Discrete Manufacturing

SOLUTION IS NOT INSTALLED

Solution description

Help manufacturers solve problems and streamline process flows.

License	Status	Expiry date
Construction	🔒	
Equipment	🔒	
Advanced Project Management	🔒	
Product Engineering a	🔒	

License description

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.