

Release Notes for Data Entry Workflow 10.0.37.12

Release Notes

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Document Information

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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) 10.0.37.12 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.34 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
Solution package	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Data Entry Workflow 10.0.37.12
Release notes	This document is provided with the Data Entry Workflow product deliverables.
Implementation methodology	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.
Getting started BPM library	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.
Documentation BPM library	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.
Authentication assets	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 10.0.37.12 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.34. 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 10.0.32 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.37, 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
6/10/2023	10.0.36.11	10.0.33	10.0.36	10.0.33 and above
10/01/2025	10.0.37.12	10.0.34	10.0.37	10.0.34 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](#)

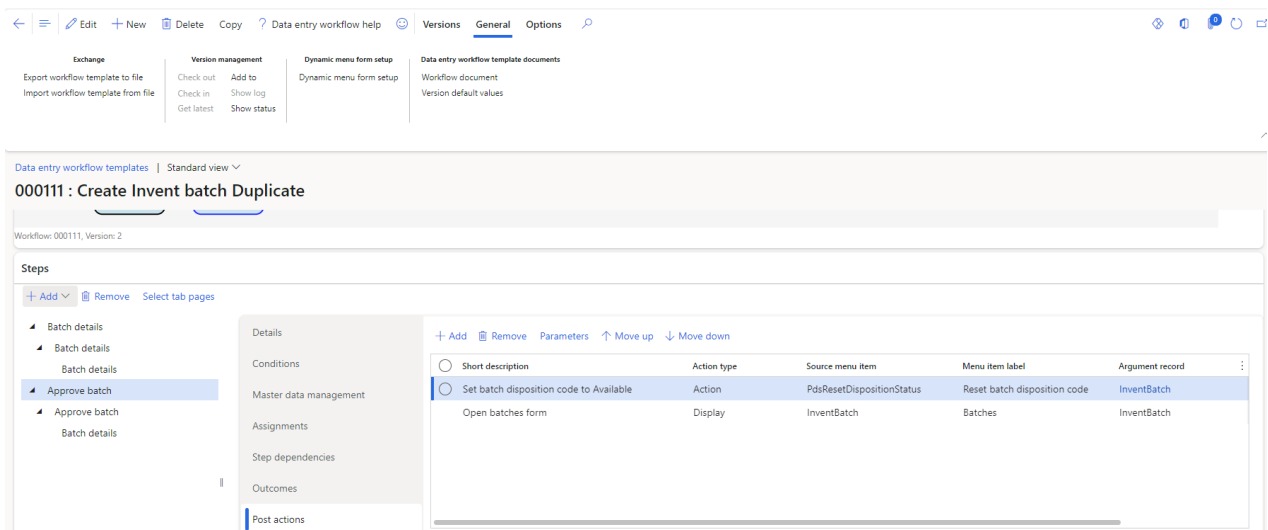
2. What's New

2.1 Current release

2.1.1 Added support for post actions.

Whenever a data entry workflow is completed, it is often the case that a specific action needs to be executed with the created record. Some common scenarios could be Posting a Trade agreement journal after it was created, Resetting the batch disposition code for a newly created batch, Open the customers form for a newly created customer etc.

To accommodate for these scenarios, we now have the options to define Post actions. On the workflow steps where the data is transferred to target tables (either by enabling the Transfer to Target flag or if the step is the last step in the workflow) we have a new Post actions tab page where actions can be added:



The setup for a post action depends upon the type of post action. It sometimes require some technical knowledge in order to configure it, but generally, a post action relates to a menu item that gets executed. Therefore, we have 3 types of post actions:

- Display – for running a form after a record has been created.
- Action – For running a specific process after a record has been created.
- Output (not implemented yet) – For running a specific report after a record has been created.

If the post action type is of type Action, then it is usually expected that various parameters need to be specified for a correct execution. These parameters can be defined in the Parameters section. These can be either process parameters (usually displayed in the first part of the process dialog) or Query parameters that can be defined to filter the records to be included in the process.

Each of these parameters can be mapped to either a fixed default value, or to a specific field of a record created/updated during the data entry workflow.


Set batch disposition code to Available : Reset batch dispo | Standard view

Post action parameters

Parameters

Parameter	Mapping type	Default value	Record field	Enum	Extended data type name
Item number	Record field		itemId	InventBatch	Range
Batch number	Record field		inventBatchId	InventBatch	Range
New batch disposition code	Default value	Avail			PdsDispositionCode

Records to include

Table name	Name	Parameter	Mapping type	Default value	Record field
 <p>We didn't find anything to show here.</p>					

Once a workflow is completed and the post action executed, all logs will be visible in the Workflow execution details screen:

Workflows | 001551 | Standard view

001551

General

Workflow	001551	Workflow template origin name	Create Invent batch Duplicate V2	Initiated by	Mariusus.Rusu	Last action by	Mariusus.Rusu	Status	Error	Target company account	usmf
Type	Create	Workflow template origin version	2	Initiated at	12/20/2023 09:25:43 AM	Completed steps	1	Processing status	Completed	Test mode	<input checked="" type="checkbox"/> Yes
Template	000116	Category	Product	Last action at	12/20/2023 09:25:53 AM	Non - completed steps	1	Initiated company account	usmf	Data cleaned at	

Tracking details list

Step name	Description	Step status	Elapsed time	Completion time
Batch details	Batch details	Ended	18 days, 6 m...	
Approve batch		Post action failed	18 days, 6 m...	

Post actions execution | 001551 : Approve batch

Standard view

Filter

Short description	Source menu item	Action type	Run mode	Execution status
Reset the batch disposition cod...	PdsUpdateDispositionStatus	Action	Asynchronous	Error

In case D365 is misconfigured and a post action fails because of that, we also added the option to re-run a post action from the Data entry workflow workspace:

Data entry workflow management

Summary



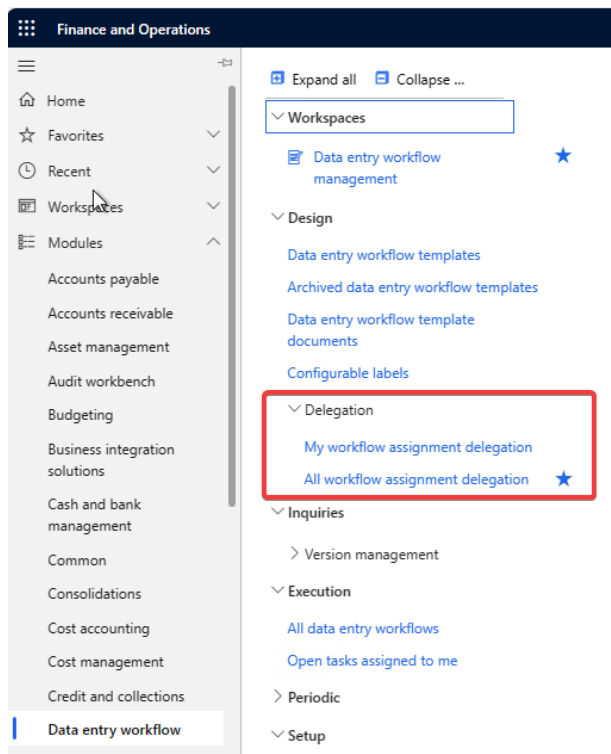
Workflow

Workflow	Title fields	Template name	Type	Status	Progress	Elapsed time	Processing stat
001469		CustGroup	Create	Error	3/4	27 days, 28 ...	Completed
001481	MR111222,MR111222	Create product v2	Create	Error	1/7	25 days, 45 ...	Open
001534		CustGroup	Create	Error	3/4	19 days, 26 ...	Completed
001542		Create Invent batch Duplicate V2	Create	Error	1/2	19 days, 3 m...	Completed
001543		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 38 ...	Completed
001545		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 23 ...	Completed
001546		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 18 ...	Completed
001547		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 12 ...	Completed
001548		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 5 m...	Completed
001549		Create Invent batch Duplicate V2	Create	Error	0/2	18 days, 2 m...	Completed
001550		Create Invent batch Duplicate V2	Create	Error	1/2	18 days, 47 ...	Completed
001551		Create Invent batch Duplicate V2	Create	Error	1/2	18 days, 13 ...	Completed

2.1.2 Delegation and reassignment

Like standard workflows, we have now added support for Delegation and reassignment. Therefore, if a user plans to have some days off, he can schedule a delegation routine that will redirect all his future data entry workflow tasks to a different user.

To do that, a new setup section has been created.



My workflow assignment delegation

The form shows delegations from or to current user. It allows to create delegation from current user. Form is available for DEW user.

User ID	Scope	Name	Delegate	Start date/time	End date/time	Enabled
Admin	Workflow	000008	ALICIA	9/18/2023 12:00:00 AM	Never	✓
LUKE	All		Admin	10/22/2023 12:00:00 AM	10/28/2023 12:00:00 AM	
AX7BISSUPPORT	All		Admin	10/22/2023 12:00:00 AM	Never	✓
Admin	All		CHRIS	10/23/2023 12:00:00 AM	Never	

The record is available for modification and deletion only if it is not enabled.

Buttons 'To enable' and 'To disable' are available for DEW manager. The buttons support multi select.

There are three options for the scope of delegations:

- All – delegate all workflows
- Category - delegate workflow templates with the same category
- Workflow – delegate only specified workflow template

Delegation will be applied only to new workflows and won't have influence on the existing.

All workflow assignment delegation

The form shows all delegations for all users. The form is available for DEW manager.

The filter is working similarly to the standard workflow delegation grid filter. The default value is 'Active'.

User ID	Scope	Name	Delegate	Start date/time	End date/time	Enabled
Admin	Workflow	000008	ALICIA	9/1/2023 12:00:00 AM	9/30/2023 12:00:00 AM	
ALICIA	All		EMIL	9/3/2023 12:00:00 AM	9/9/2023 12:00:00 AM	
Admin	Workflow	000008	ALICIA	9/18/2023 12:00:00 AM	Never	✓
ALICIA	Workflow	000008	AX7BISSUPPORT	9/24/2023 12:00:00 AM	9/30/2023 12:00:00 AM	✓
LUKE	All		Admin	10/22/2023 12:00:00 AM	10/28/2023 12:00:00 AM	
ALICIA	Category	Customers	AX7BISSUPPORT	10/22/2023 12:00:00 AM	Never	✓
AX7BISSUPPORT	All		Admin	10/22/2023 12:00:00 AM	Never	✓
JACOB	All		AX7BISSUPPORT	10/23/2023 12:00:00 AM	Never	
Admin	All		CHRIS	10/23/2023 12:00:00 AM	Never	

Delegation

When the workflow is started, the user assignment would consider the enabled delegation setup. If the assignment from the workflow template has enabled delegation for the current date, the workflow will be delegated to the related user.

The priorities for the scope are Workflow – Category – All.

It's possible to have several delegations (A->B->C). But loops are not allowed (A->B->C->B).

If the parameter is enabled, a new button is displayed during the workflow execution. The label of the button is based on the label of the field.

Reassignment

The Workflow form was changed. A new tab for the assignments was added.

Finance and Operations

Cancel ? Data entry workflow help Options

Personalize Personalize this page Page options Security diagnostics Record info Advanced filter or sort Go to Share Create a custom alert Manage my alerts

Workflows | 000145 | Standard view

000145

Tracking details list

History Field values Reset Post actions execution

Step name	Description	Step status	Elapsed time	Completion time
st1		Ended	4 days, 39...	
Approve		Assigned	4 days, 39...	

Assignments

Reassign

Step name	User ID	Source type	Source assignment id
Approve	APRIL	User	Test user
Approve	INGA	User	AX7BISSUPPORT
Approve	ALICIA	User	ALICIA
Approve	AX7BISSUPPORT	Role	System administrator

This tab shows all assignments for the active steps. The view of the form is similar to what we had on the 'View assignments' form. Now the 'View assignments' button is removed.

A new button Reassign was added. This button will allow reassigning the existing workflow task to another user.

Reassignment to the user who already has an assignment is not possible.

Delegation rule will work with reassignment as well.

Button support multi select for the record with the same User ID. The button is available for DEW manager.

A new dialog form was created.

In the dialog a target user could be specified together with the comment. A comment will be stored similarly to the existing delegation during the workflow execution.

Starting a new workflow

The delegation also allows user to start the workflow. Delegated workflow will be visible in the lookup while initiating workflow.

If we have several delegations in a row with Scope=All (A->B->C), all the workflows for A and B users will be available for C. In case Scope is not set to 'All', only the specified workflow template or templates linked to the category will be available.

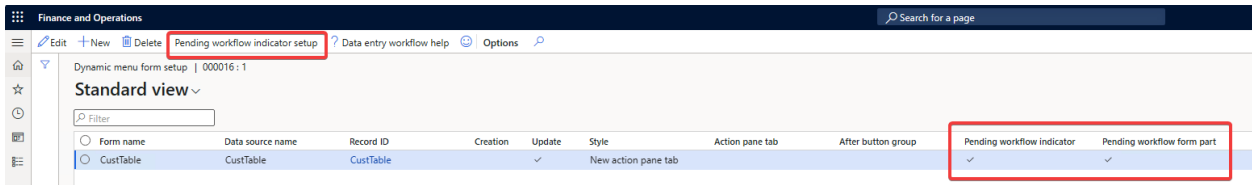
2.1.3 Indicator for records with pending workflows

As workflows can be started for existing records, it is necessary to know if an existing record has a pending workflow as the same record cannot be edited by 2 different workflow instances at the same time.

To achieve this, we have introduced two new features:

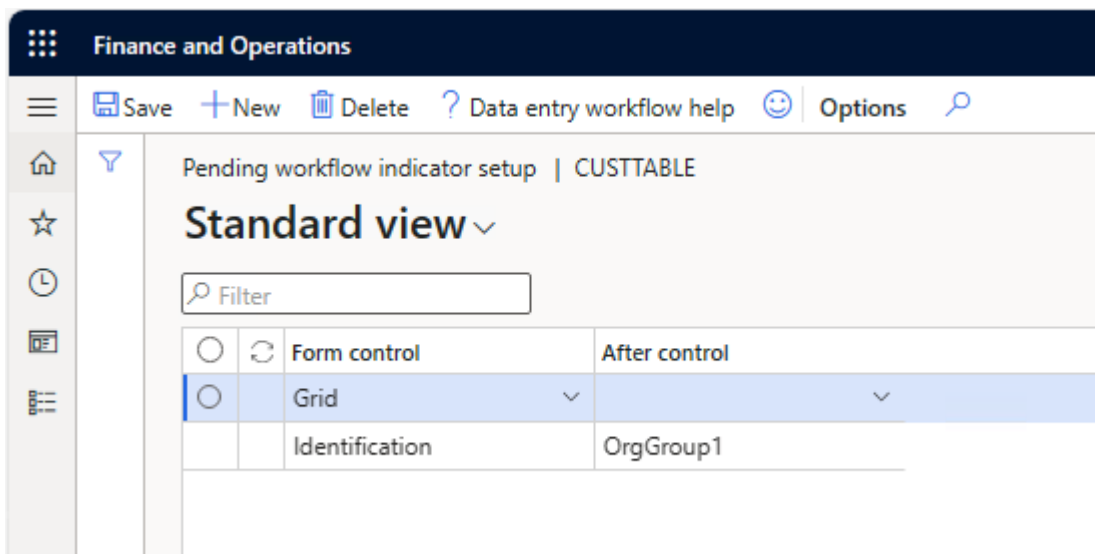
1. Indicator – an image or check box in the grid or field group to indicate that current record has a pending workflow.
2. Form part – a new form part to show pending workflow instances for current record.

To enable a new functionality, two parameters were added to the DEW Dynamic menu form setup. Parameters are editable if data source name is not empty.



- Pending workflow indicator – Display the indicator field on the form specified in the ‘Form name’ field for the current record from the data source specified in ‘Data source name’.
- Pending workflow form part - Display the form part on the form specified in the ‘Form name’ field. Use the current record from the data source specified in ‘Data source name’.

To specify the exact location of the indicator, a new form called ‘Pending workflow indicator setup’ was introduced. The form is accessible from the Dynamic menu form setup form when ‘Pending workflow indicator’ is enabled.



- Form control - Select a grid or group control to add a field for the indicator showing if there is a pending data entry workflow active.
- After control - Specify the position where to add the indicator. Leave the field empty if it should be in the first position.

When form is opening, the setup will be checked and new field and/or form part will be added. The workflows started in ‘Test mode’ are not considered. If indicator was added to the grid, an image will be show. If indicator was added to the field group, a check box will be show.

Finance and Operations Search for a page USMF

Edit + New Delete Data entry workflow Customer Sell Invoice Collect Projects Service Market Commerce

Data entry workflow Edit record

Customers My view

Filter

Account	Name	Invoice account	Customer group	Currency	Telephone
DE-001	Contoso Europe		90	EUR	01234 5
US-001	Contoso Retail San Diego		30	USD	321-555
US-002	Contoso Retail Los Angeles		30	USD	123-555
US-003	Forest Wholesales		10	USD	123-555
US-004	Cave Wholesales		10	USD	123-555
US-005	Contoso Retail Seattle		30	USD	123-555
US-006	Contoso Retail Portland		10	USD	123-555
US-007	Desert Wholesales		30	USD	123-555
US-008	Sparrow Retail		30	USD	123-555
US-009	Owl Wholesales		10	USD	123-555
US-010	Sunset Wholesales		10	USD	123-555
US-011	Contoso Retail Dallas		30	USD	123-555
US-012	Contoso Retail New York		30	USD	123-555
US-013	Pelican Wholesales		10	USD	123-555
US-014	Grebe Wholesales		30	USD	123-555
US-015	Contoso Retail Chicago		30	USD	123-555
US-016	Whale Wholesales		10	USD	123-555
US-017	Turtle Wholesales		10	USD	123-555

Related information

- Primary address
- Recent activity
- Relationships
- Statistics
- Credit statistics
- Contacts
- Recurring invoice template
- Classification balances
- Pending workflow**

Workflow	Name
000162	CustTable
- Insurance and guarantees

Finance and Operations Search for a page USMF

Edit + New Delete Data entry workflow Customer Sell Invoice Collect Projects Service Market Commerce

Accounts Transactions Balance Forecast Set up EDI Attach

Contacts Change party association Transactions Global transactions Bank accounts Summary update Credit cards Product filters Customers advanced notes setup Party setup EDI document flows EDI journal validation EDI history management Attach

Customers | My view

US-011 : Contoso Retail Dallas

General 30

CUSTOMER	Customer group	ABC code
Account	30	None
US-011	Classification group	DUNS number
Type	Payment priority	
Organization		OTHER INFORMATION
Name		Address books
Contoso Retail Dallas		RetailCust
Search name	ORGANIZATION DETAILS	Language
Contoso Retail Dalla	Number of employees	en-us
Has pending workflow	0	
<input checked="" type="checkbox"/> Yes	Organization number	

Show more fields

Addresses

Contact information

Miscellaneous details 02 | Always

Related information

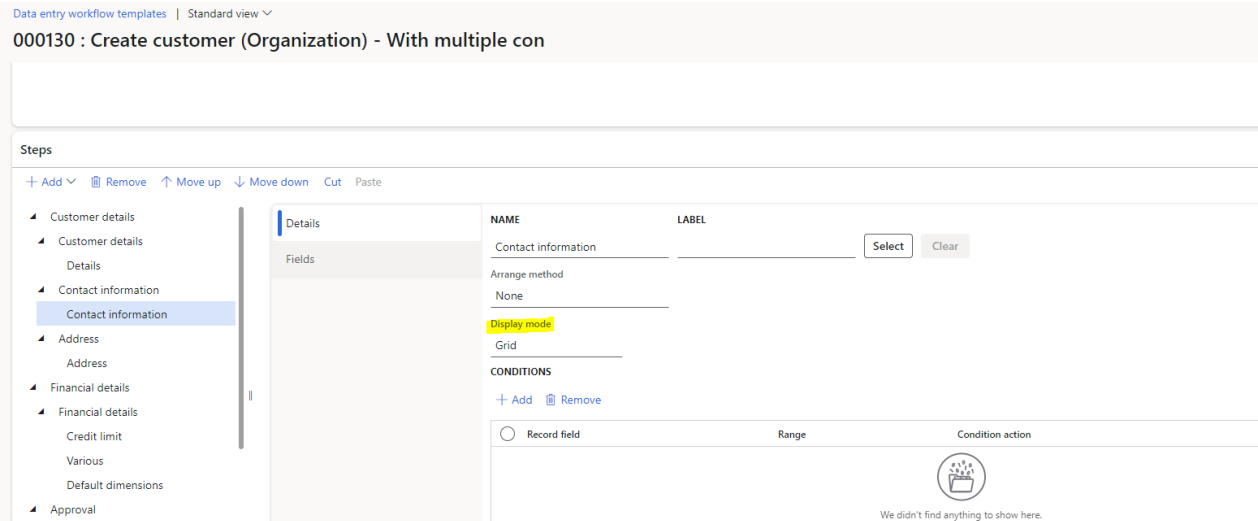
- Primary address
- Recent activity
- Relationships
- Statistics
- Credit statistics
- Contacts
- Recurring invoice template
- Classification balances
- Pending workflow**

Workflow	Name
000162	CustTable

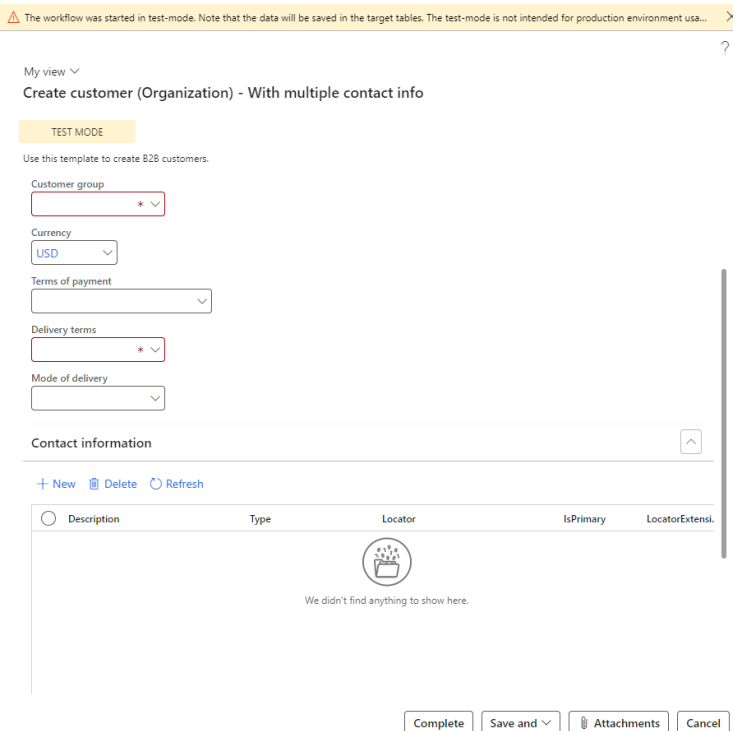
2.1.4 Support of Grid Controls (Preview)

One of the important features that Data entry workflow was missing when creating a master data record is the ability to create multiple related records to that master record. For example, when creating a customer, defining multiple addresses or contact information needed a lot of setup. Also, when it comes to defining a product, there are several elements in the data structure (prices, batches, related products etc) that need to be defined.

To accommodate for these scenarios, we have now added support for grid control. Now, when defining the workflow, a field group can be configured to be displayed as a grid.



When displayed as a grid, the workflow will allow for multiple records to be created for the document that acts as a backing entity for the grid.



If a grid is present in a Data entry workflow step, then the data defined in those fields need approval, then the approval step will also have to contain those fields in a field group that is configured to be displayed as a grid.

As opposed to standard fields, when dealing with grid records, the approve/Change request actions happen at record level instead of field level.

?

My view ▾

Create customer (Organization) - With multiple contact info

TEST MODE

Please check the details and take an approval action.

Approval ^

DETAILS

Account: ✓ ✗ Name: ✓ ✗ Customer group: ✓ ✗ U

Contact information ^

Approve record Change request record ▾ Show record history

<input type="radio"/>	St...	Description	Type	Locator	LocatorExtension
<input type="radio"/>		Phone	Phone	5436767433	
<input type="radio"/>		Email	Email address	John@smith.com	

Because this is now released in Preview mode, there are a couple of limitations that need to be considered.

1. The fields included in a field group must come from the same document record. This is mainly because of the way the grid works with data sources. In our preview version, the grid can only have 1 data source that is dynamically generated based on a temporary table. We will add support for multiple joined data sources for a grid in future releases.
2. Because the wizard form is dynamically generated, we recommend that each field group that is displayed as a grid sits in its own tab page. This is because in addition to the grid, we are also adding an action pane with grid specific buttons.
3. Because the grid control needs a backing data source, we have created a limited list of temporary tables that can serve for this purpose. This means that in Preview mode, we will only support 10 different tables that can be configured for multiple record entry using grid control. If a table appears in 2 different workflows (e.g. LogisticsElectronicAddress for contact information appears on both Customer and vendor templates) then it will still count as 1 table.

4. If a table is present in a grid, then we currently don't support creating multiple records in the related tables. One example would be adding Addresses in a grid. This is not supported yet as we also need multiple records in additional tables.

3. Bug Fixes

Internal

- Staging data created from BIS integration is only written for fields that are present in the workflow template:
 - Fix: Now all fields are written in the staging area if they are defined in a workflow document.
- BIS-DEW integration: Staging data is only created after the first step is created.
 - Fix: When a standard data entry workflow is started for editing a record, the staging data is created first and then the first step is created. Now the BIS-DEW integration follows the same order.
- BIS-DEW integration: Default values are not being considered if they are not provided in the source document.
 - Fix: Updated logic to insert default values if fields are not in the workflow template
- Table browser button on workflow document record does not work.
 - Fix: corrected behaviour to open table browser for the document record table.
- Select fields for approval not working correctly after implementing tab pages.
 - Fix: Reworked Field selection screen to add either an entire tab page, an entire field group or individual fields based on the focused tree node in the workflow template design screen.
- DEW - Updating contact information with a DEW template removes the existing data.
 - Fix: Fixed the data entity
- Step assignment not working in case of organization assignments.
 - Fix: Fixed the views involved in the assignment framework
- Sequence of the tab pages are not coming in correct way
 - Fix: Updated the wizard handler to take the Tab page sequence into consideration
- Getting Object reference not set to an instance of an object error when no Action pane is specified in Dynamic form Setup.
 - Fix: Added additional validation when the dynamic setup is being added to target form.
- Version is not being reinstated if we import a template that has been previously archived.
 - Fix: We are now reactivating the workflow version.

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.
- Grid control has been released in Preview mode, which comes with some limitations:
 - We currently support 10 tables that can serve as grid data sources.
 - We can have fields from a single workflow document record in a grid.
 - We can only have 1 grid per Tab page.

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.