TO INCREASE

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Release Notes for Data Entry Workflow 10.0.28.3

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) 10.0.28.3 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
Solution package	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Data Entry Workflow 10.0.28.3
Release notes	This document is provided with the Data Entry Workflow product deliverables.
Implementation methodology	The solution package contains a *Data Entry Workflow implementation methodology* 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 *Getting started with Data Entry Workflow* 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 *Data Entry Workflow*. 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.

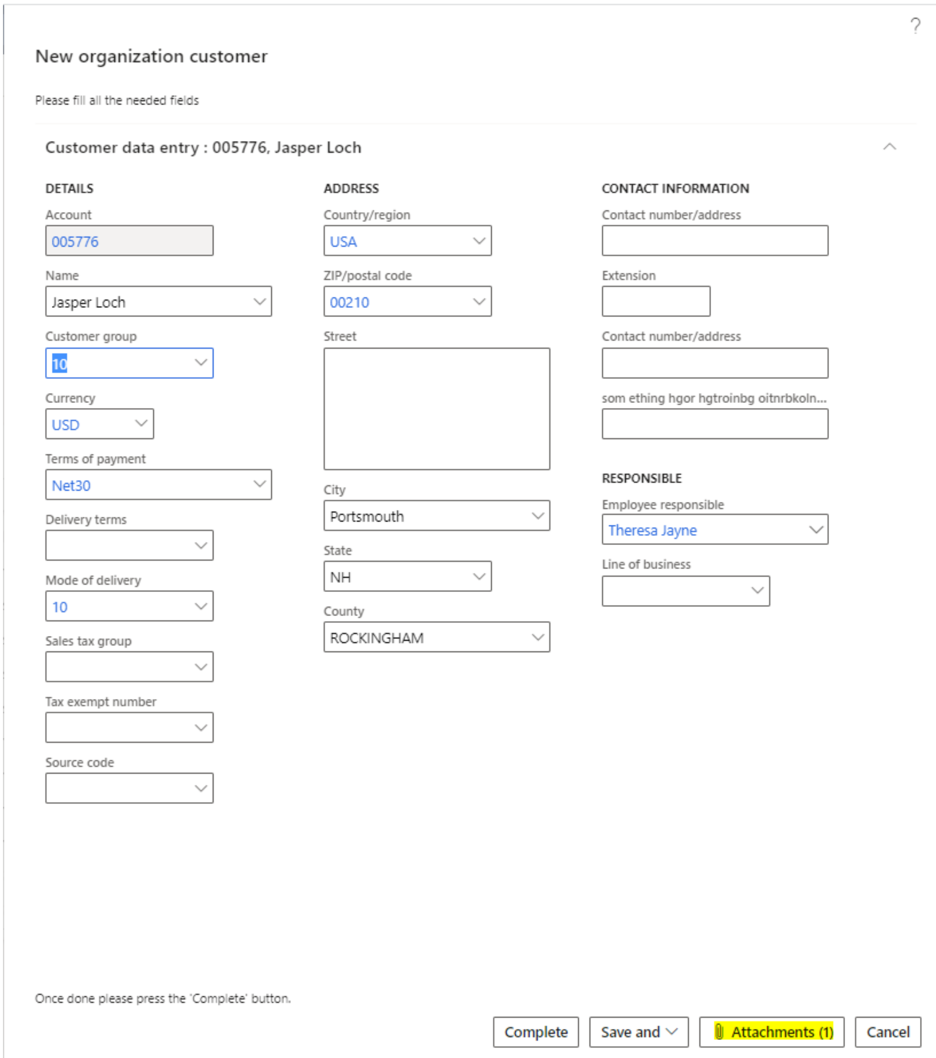
2. What’s New

2.1 Current release

2.1.1 Add Attachments during workflow execution

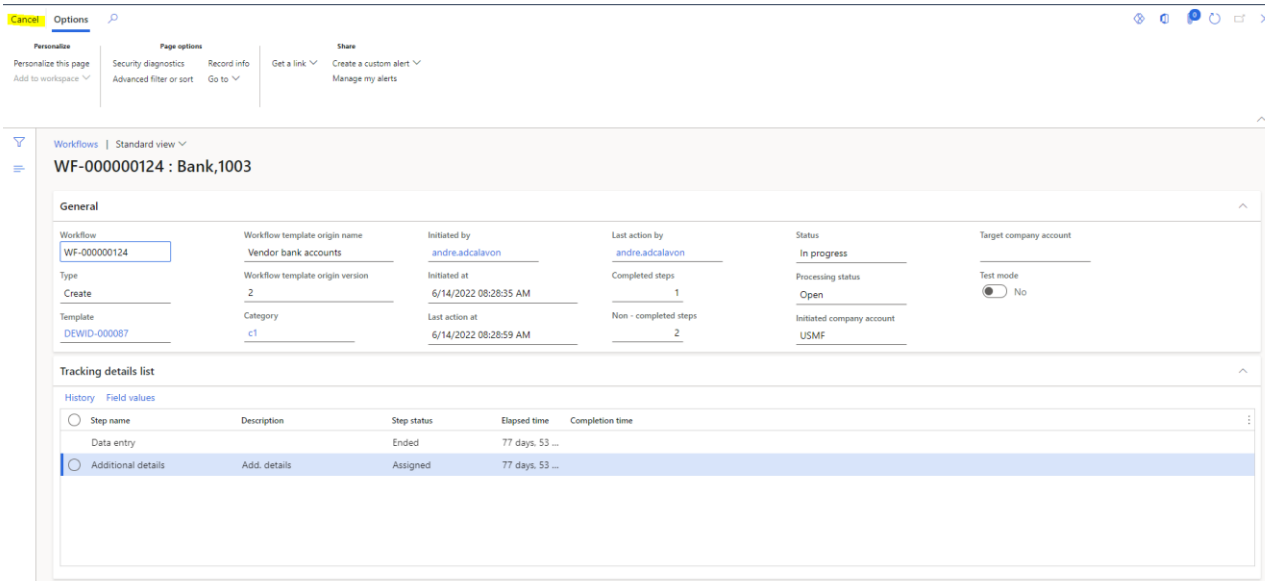
Since the workflow execution wizard uses the Dialog form template, there was no option to enable the standard document handling feature of D365. To overcome that and allow users to take notes or attach documents to a workflow we have added a new button – Attachments – on the workflow wizard form.

The button will indicate how many document handling entries already exists linked to the workflow. These attachments will only be used for internal communication purposes regarding the workflow instance and will not be copied to the target record.



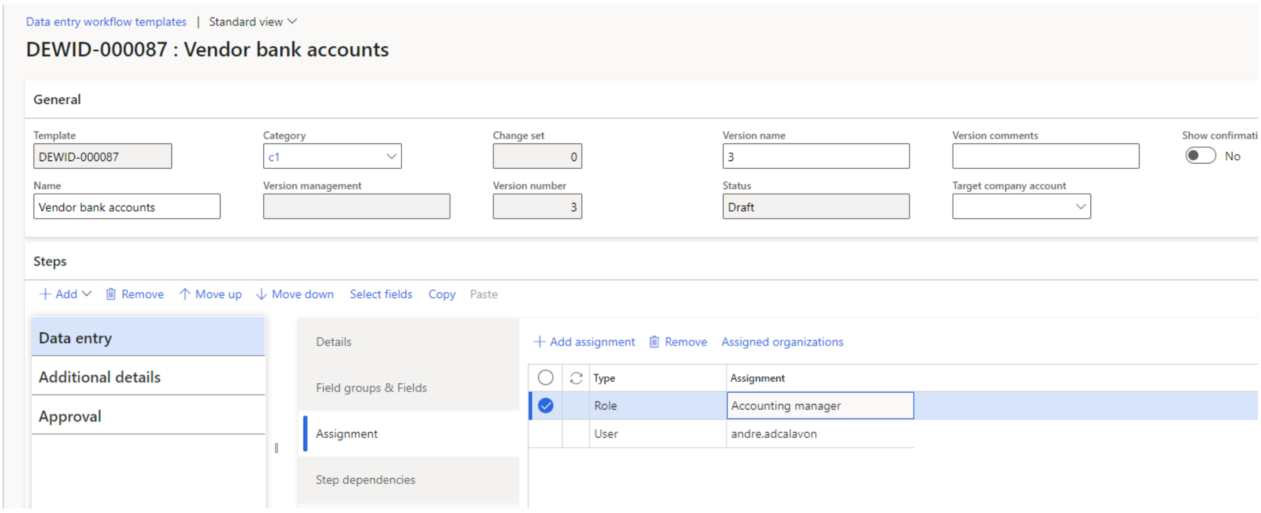
2.1.2 Cancel a workflow mid-execution

Cancelling a workflow mid-execution is now possible from the Workflow details page. Cancelling a workflow is only possible if there are no “In Progress” steps. An “In Progress” step means that the user is actively working on the workflow, so cancelling it should not be allowed.



2.1.3 Step assignments based on Security roles

It is now possible to assign a step to a security role. In addition to User and Team, we have added the option to make an assignment based on security role. The way this works is the same as the previous options. If multiple users are assigned to a security role, and that security role is assigned to a step, all the users will have the option to start/continue a workflow.



3. Bug Fixes

Internal

- Link to workflow form does not select the correct record on the details form.
    - Fix: Navigation from the Data entry workflow management workspace to the workflow details form has been corrected.
- Delegate and Reject buttons not working correctly.
    - Fix: Both operations are now behaving as expected.
- Cancelling an Update workflow instance does not delete the workflow
    - Fix: The workflow is not deleted if we start a workflow in Edit mode and we are not doing any changes to the data.

4. 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.
- The copy process is assuming it will always write data to records except for product dimension groups which are used for lookup purposes. It would imply that if you e.g., have the Sales Tax/VAT number table to create a new record an link it directly to a customer or vendor, it will now assume that the VAT (Value Added Tax) number will not be empty as it tries to insert or update an existing record in the reference table.

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 of 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 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 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.