TO INCREASE

Author: Marius Rusu

Release Notes for Data Entry Workflow 10.0.30.5

Release Notes

Table of Contents

Document Information

Title	Release Notes for Data Entry Workflow 10.0.30.5
Subtitle (Subject)	Release Notes
Solution Suite	DEW; Data Entry Workflow
Category	Release Notes
Author	Marius Rusu
Published Date	11/1/2022
Status	Final
Comments	Release 10.0.30.5

1. Introduction

1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.30.5 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

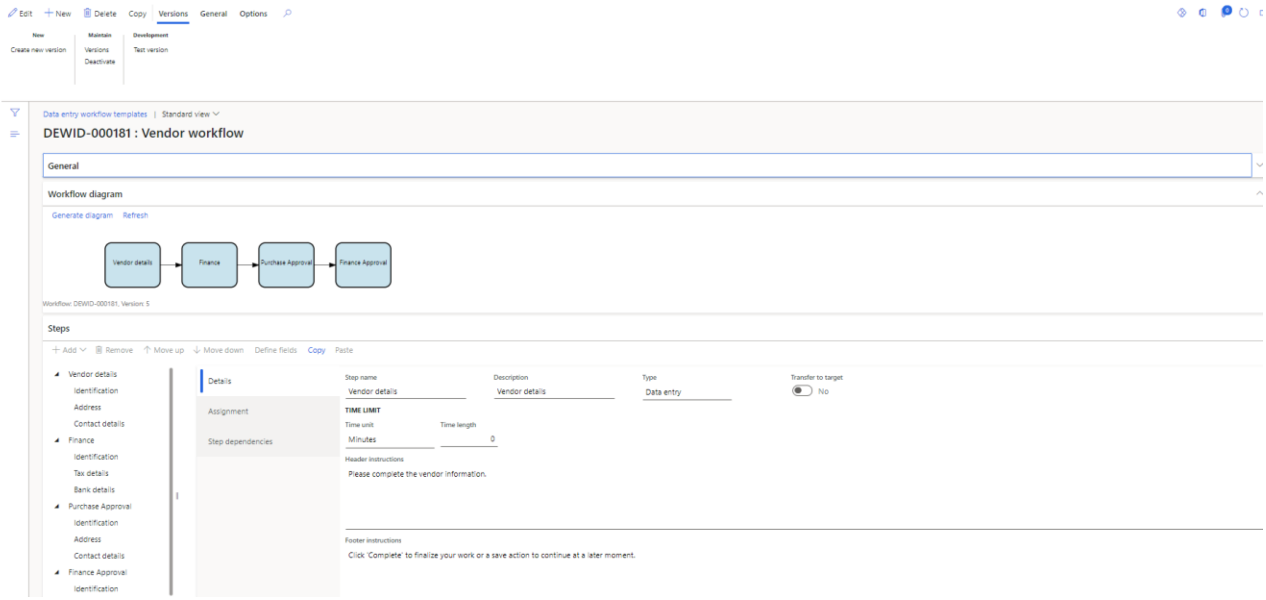
Deliverable	Description
Solution package	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Data Entry Workflow 10.0.30.5
Release notes	This document is provided with the Data Entry Workflow product deliverables.
Implementation 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 Workflow visualisation diagram & workflow template redesign

To help workflow designers to better define a workflow template, we have introduced a new visualization tab page which will display a graphic representation of the workflow.



The diagram will show the sequence of the steps, whether they are sequential or parallel. For new workflow templates, the diagram will be automatically generated as steps get added to a workflow. For existing workflow templates, there is a 'Generate diagram' button on the new tab page that will generate the diagram.

In addition, to ease the navigation between steps and field groups, the Steps Grid has been replaced with a different control that lists the steps and field groups. Therefore, it will be easier to navigate through these elements without the need of too many actions.

2.1.2 Validation for workflow activation

We have introduced a couple of validations that will get checked when a workflow template is activated. The purpose of these is to make sure that the workflow template is completely and correctly defined and that no essential elements are missing.

The following things will be checked:

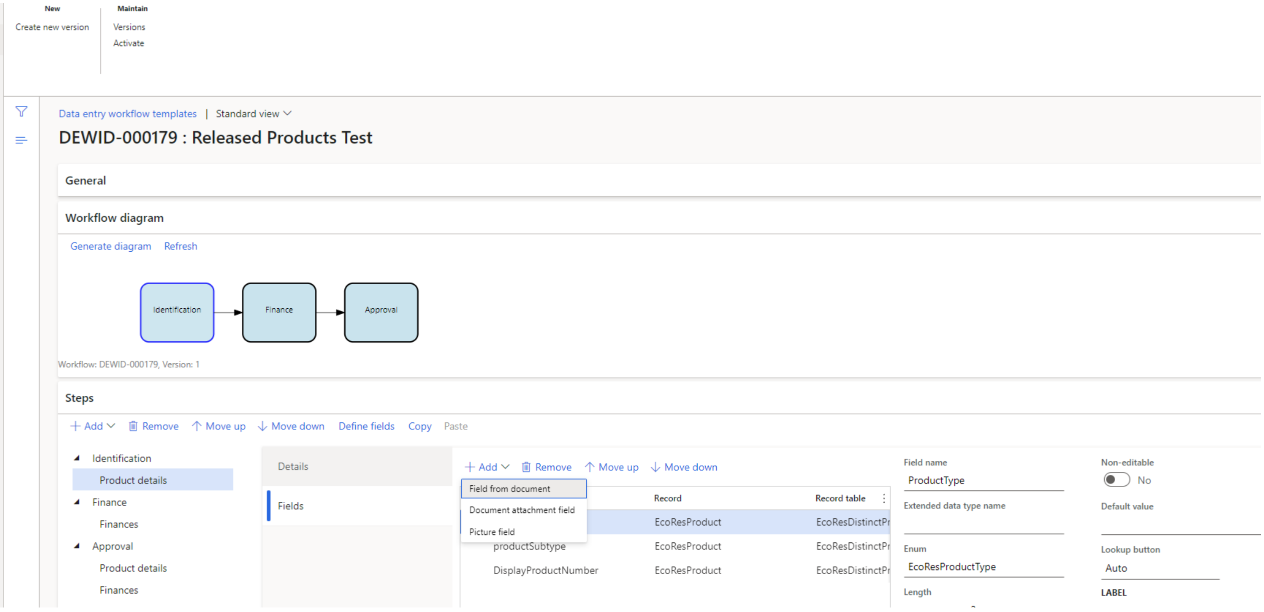
- Check if all steps have at least one assignment
- Check if the assigned users are enabled
- Check if the assigned teams are valid:
  - They are active
  - They have at least one active member
  - The team type has the Require AX user flag ticket
- Check if the approval steps have the Approve outcome enabled

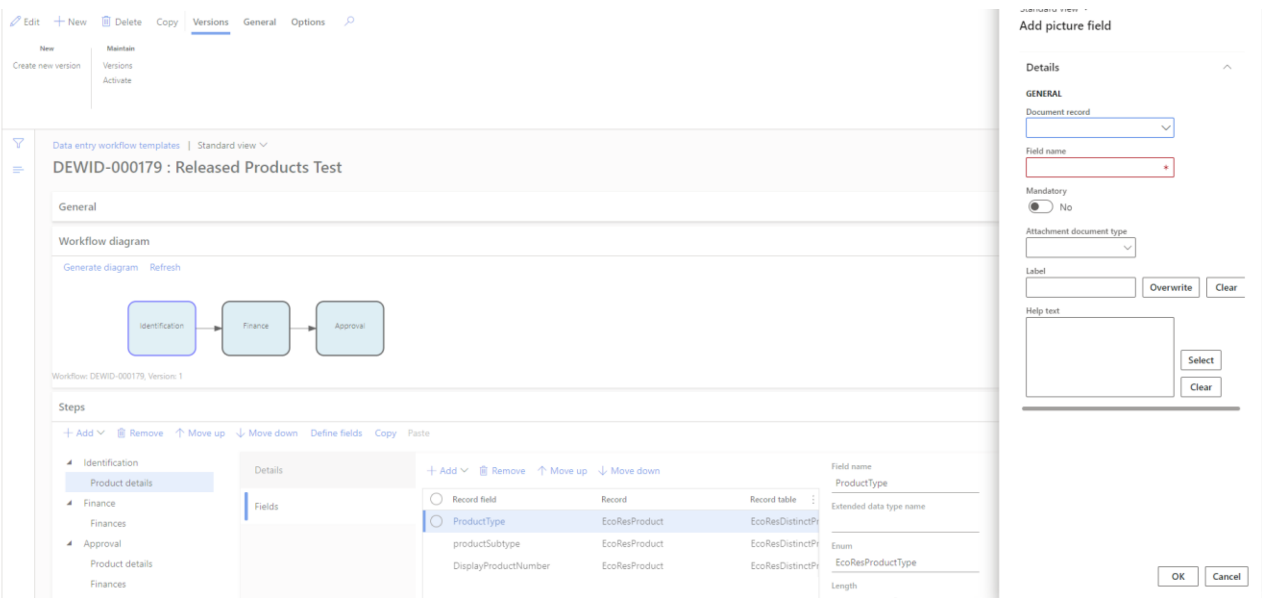
- Check if the approval steps have the ‘Reject’ or ‘Change request’ enabled
- Check if all steps have at least one field defined
- Check if the organization assignments on the first step are replicated on all subsequent steps
- Check if the mandatory fields of a table are correctly added and configured on the document

2.1.3 Define documents and pictures type fields on workflow template

It is now possible to define fields that store pictures or documents. The purpose of these is to enable the same functionality that exist for standard fields in terms of display, mandatory option or approval.

Therefore, it is now possible for a designer to define a picture field on a Product workflow, make it mandatory and also configure the approval step to include the same field.





Once completed the document and picture fields will be transferred as document handling entries on the entity on which they were defined.

2.1.4 Fixed assets number sequence support

The number sequence generation for fixed assets works a bit different in standard D365 compared to other entities. The fixed asset ids get generated based on the selected fixed asset group. We have enhanced our product to support the same functionality when running workflow for a fixed asset workflow template.

3. Bug Fixes

Internal

- Unexpected record template selection pop-up when opening steps – When record templates were available on a specific table, starting an workflow would prompt a record template selection screen. This should not happen
    - Fix: The record template selection will not show up when starting the workflow from the Data entry workflow workspace
- Configurable labels – Label id generation not working as expected – Although the Label id number sequence is correctly configured in the Parameters screen, the label ids were not generated correctly.
    - Fix: Generating a new label will pick up the next label id number.
- Activate/Deactivate allows multi select but updates only last record –
    - Fix: The multiselect option for the Activate/Deactivate button has been disabled
- Field Picker - sometimes the design looks empty when the field recording starts.
    - Fix: The focus is now correctly set when the field recording starts.
- Adding "Field group" through "Define fields" gives the “No field group selected” error. This is happening when a user clicks on Fields before defining a field group. The error is not shown immediately but only when the field picker is closed.
    - Fix: The error is now shown directly when the user tries to access the Fields section without selecting a field group first.
- The field with ID '0' does not exist in table when using the field selector - This error appears when trying to define a workflow template for Legal entities
    - Fix: We have fixed the field selection on legal entities as well as some validations executed during workflow execution.
- "Change Request" functionality doesn't take to a step where the field was last changed
    - Fix: Asking for a change request will now return the workflow to the user that originally filled in 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 with the exception of 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 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 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.