
Release Notes for Data Entry Workflow 10.0.30.6

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) 10.0.30.6 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 10.0.30.6
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.

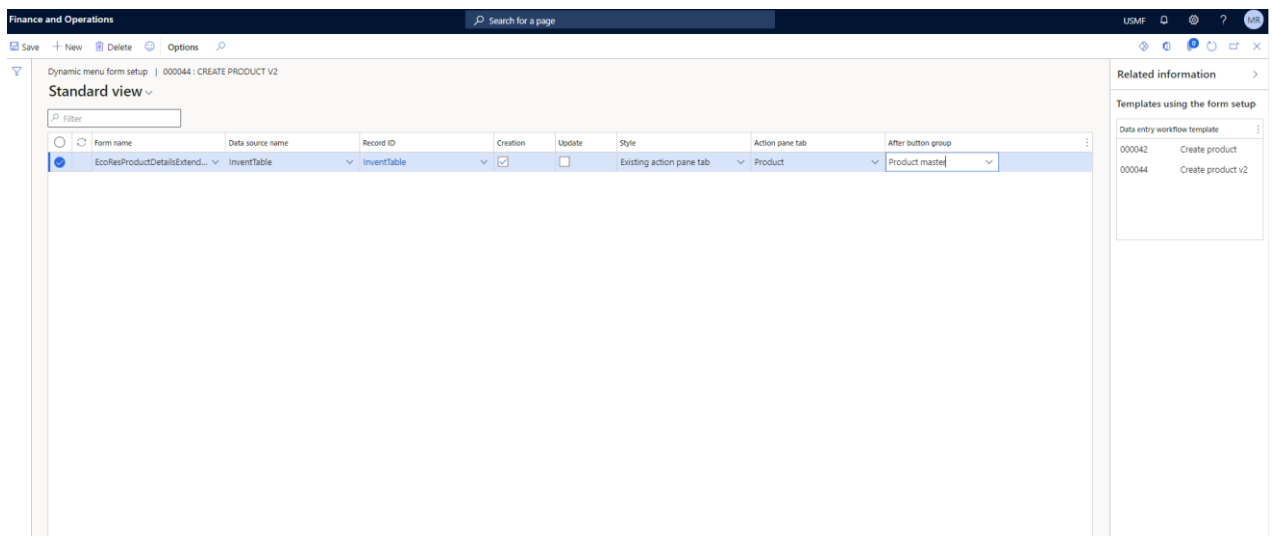
2. What's New

2.1 Current release

2.1.1 Data entry workflow – dynamic buttons enhancement

In previous release, it was possible to configure a dynamic menu button option that would enable starting a data entry workflow template from any configured form. We enhanced the setup form and now it is possible to specify the style in which the buttons can be added. Therefore, we do have the following options now:

- New action pane tab – Adds the buttons to a new action pane called 'Data entry workflow'
- New button group – adds the dynamic buttons to a new button group.
- Existing action pane tab – Adds the buttons to an existing action pane tab at the beginning or after a specific existing button group.



2.1.2 Easy support for product attributes

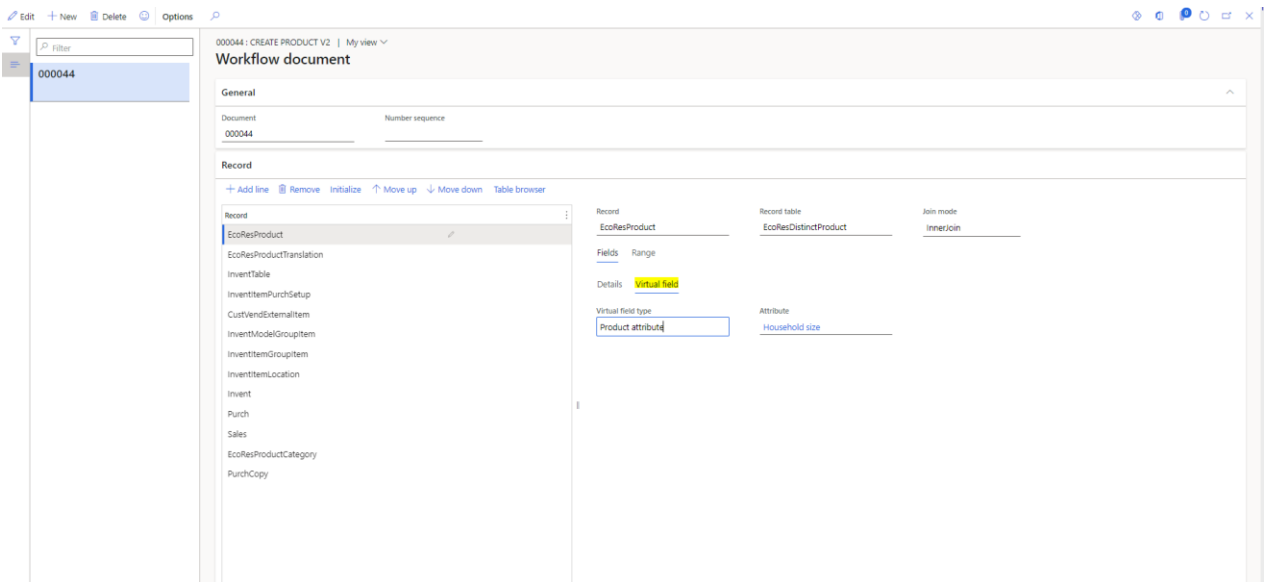
Adding product attributes to a data entry workflow template was quite a hassle as it needed a lot of configurations in the workflow document to allow the data to be displayed and stored properly.

To ease this setup, we have added a designated option that can be used to select multiple attributes at a time.

To be able to support this easy setup, the workflow document had to suffer some changes. First of all, we have added a document field type to specify whether the field is Physical (meaning it exists on the record table) or Virtual (meaning the field is not an actual field on the table and carries special logic).

When highlighting a virtual field, a new tab page will appear displaying additional virtual field properties. Now, there are 3 virtual field types:

- Document fields
- Picture fields
- Product attributes



When adding product attributes, these will be added to the specified document record as virtual fields, and they will also store the attribute reference that they are representing.

Since product attributes are being category dependent, during data entry workflow execution these will be displayed on the form based on a selected product category. If no Category is selected, then the product attributes will not be displayed.

Create product v2

TEST MODE

Product attributes : X1011, X1011

<p>CATEGORY</p> <p>Category hierarchy <input type="text" value="Channel navigation hierarchy"/></p> <p>Category <input type="text" value="Accessories"/></p>	<p>PRODUCT ATTRIBUTES</p> <p>Brand <input type="text" value="Northwind Traders"/></p> <p>Drive Capacity <input type="text" value="0.00"/> <input type="text" value="GB"/></p> <p>Household size <input type="text" value="0"/></p> <p>OnSale <input checked="" type="radio"/> No</p> <p>Parent Currency <input type="text" value="0.00"/> <input type="text"/></p> <p>Parent DateTime <input type="text"/></p> <p>Review rating <input type="text" value="0.00"/> <input type="text"/></p> <p>Specification <input type="text"/></p>
---	---

Editing products using a data entry workflow template will also allow editing the existing product attributes if these have been added to the template.

2.1.3 Important: Data model update scripts

To Support the latest features that we've added, there are a couple of new tables and fields that will need to be backfilled for the existing data. To do this, we have prepared a one-time job upgrade script that will need to be executed after the release is installed.

Therefore, after installing the release you will need to run the script called *DewRunUpgradeScriptsToDew100306* by going to the following URL on your machine:

<https://<URL of your D365 environment>/?mi=SysClassRunner&cls= DewRunUpgradeScriptsToDew100306>

2.2 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, a table lists various solutions with their installed versions and statuses. A modal window for 'Advanced Discrete Manufacturing' is open, showing a 'SOLUTION IS NOT INSTALLED' message and a table of licenses.

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		×

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

3. Bug Fixes

Internal

- Attachment document type should be mandatory field while adding picture or file
 - Fix: We have implemented some validations that will not allow creating a document or picture field without specifying the document attachment type.
- Attachment document can't have a default value
 - Fix: disabled the default value for these fields.
- MDM grid lookups stopped working
 - Fix: An issue was introduced with the past release, and it was fixed now.
- Field Picker - sometimes the design looks empty when the field recording starts.
 - Fix: The focus is now correctly set when the field recording starts.
- Copy workflow is not replacing parent references correctly in workflow documents.
 - Fix: The copy process has been fixed to copy the references correctly.
- Workflow templates list page is being skipped due to focus on visualization control
 - Fix: When the first workflow template had a diagram generated, the focus was automatically moved to the Detailed view. This has been fixed now.
- Getting validation error during activation if document record table does not exist.
 - Fix: The validation that checks if the document record backing table exists was not workflow template specific but it was looping through all templates. This has been fixed.
- Import and copy should not activate the template
 - Fix: The imported/copied templates will not be activated.
- Error executing code: The field with ID '0' does not exist in table 'VendTable'
 - Fix: the error appears if with the Field picker we are selecting data methods from the table. Since these are not currently supported, we have added a validation that will prevent users from selecting data methods using the field picker.

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.

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.