

Release Notes for Data Entry Workflow 10.0.30.7

Release Notes

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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) 10.0.30.7 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 10.0.30.7 |
| 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

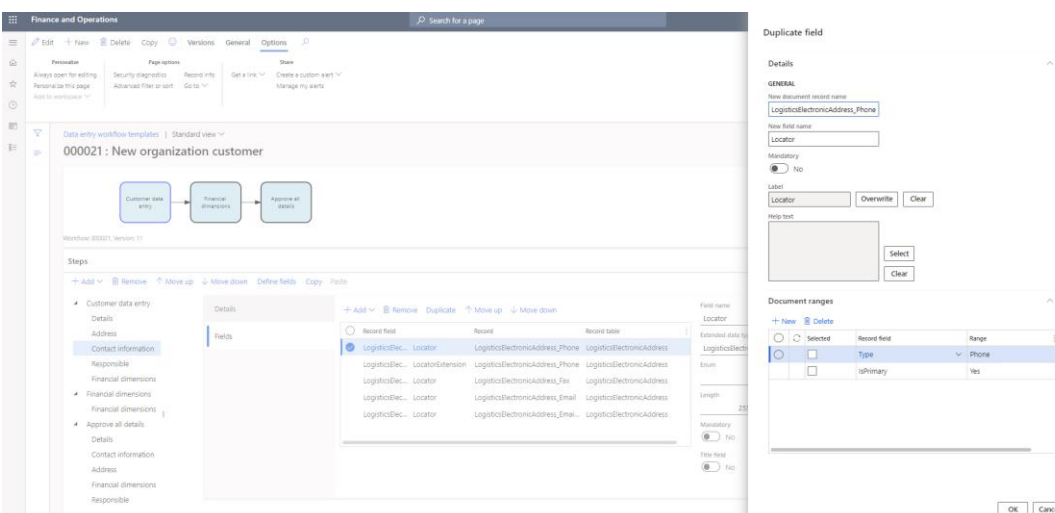
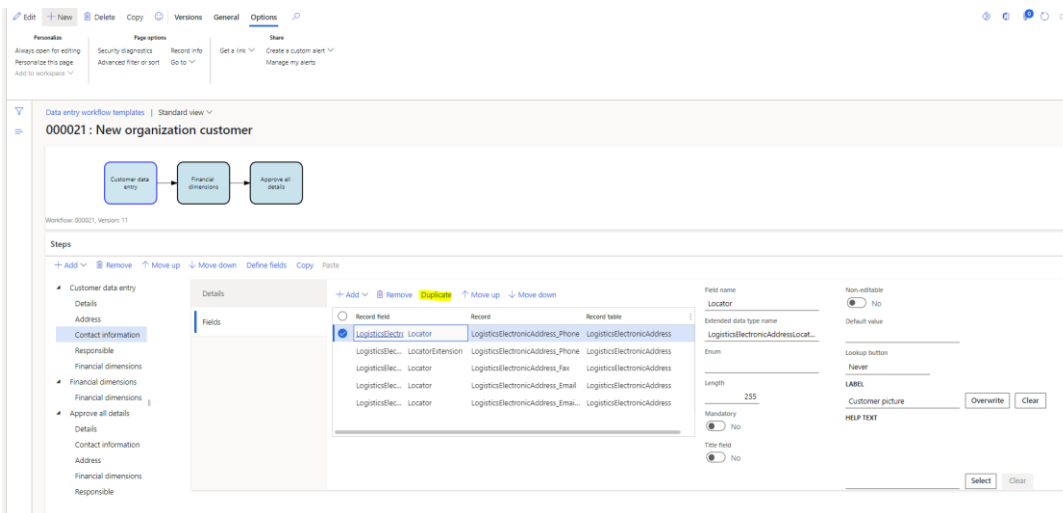
2.1 Current release

2.1.1 Data entry workflow template – Duplicate Field functionality

When dealing with complex templates it is sometimes necessary to manually adjust the workflow document to enable adding more than one related record to the main workflow entity. For example, adding 2 phone numbers to a customer or 2 bank accounts to a vendor.

Doing the manual setup implies creating 2 sets of document records with necessary ranges and then adding the fields to the necessary field groups.

To ease the whole process, we have added the Duplicate field functionality, that will copy the field, document record and desired ranges with a simple dialog prompt.



Once the details have been filled and OK is pressed the following will happen:

- The new document record will be copied from the existing one linked to the original field.
- The selected ranges will be created and linked to this new document

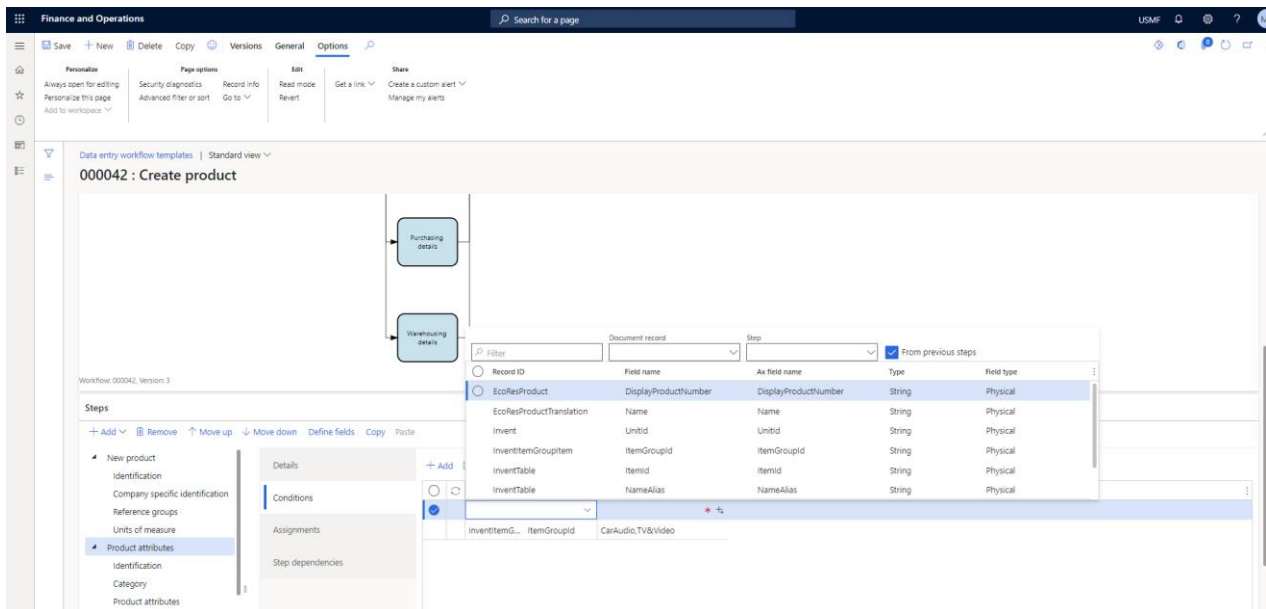
- The duplicated field will be created in workflow template.

2.1.2 Conditional step and conditional step assignment

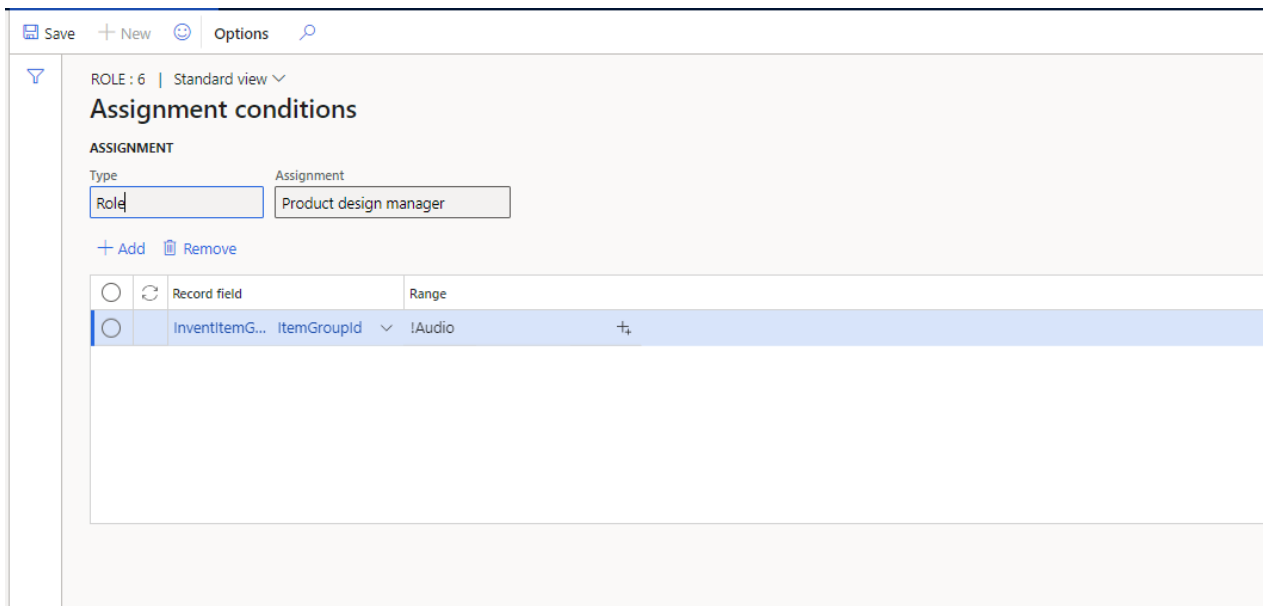
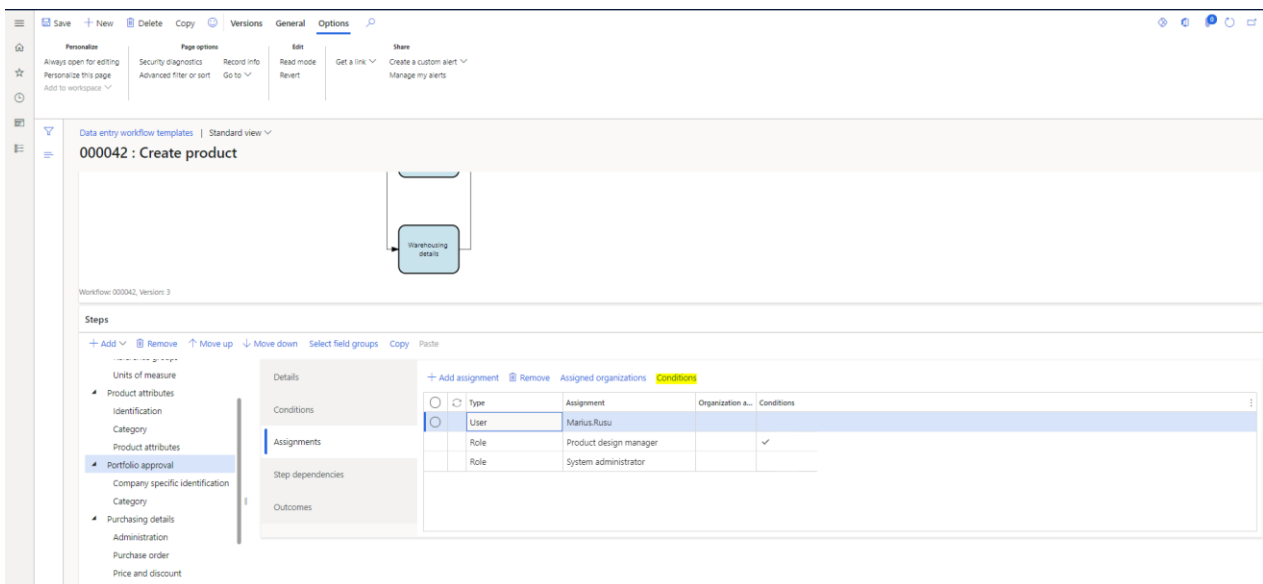
One important feature that every workflow framework should contain is the ability to execute a certain step only if various conditions are met. Therefore, we have now improved our solution and added this feature. There are 2 types of conditions that we can now define on a data entry workflow template:

1. Step conditions : If any defined, then the step will be created and assigned only if all conditions defined are met. Otherwise, the step will be created and skipped.
2. Assignment conditions: On every assignment record defined against a step, we can now define conditions. If any defined, then during execution, if all conditions are met, the assignments will be added to the step.

To define a step condition, you need to select the step that you want conditioned and go to the Conditions tab page. There you will be able to add conditions based on workflow document fields. The field lookup has been improved to allow users to filter based on document records, steps or simply filter only the fields that have been included in previous steps:



To define step assignment conditions, you need to select to the step assignment that you need conditioned and add click on the Conditions button added to the ribbon. A new form will be displayed where the conditions can be added. You will notice that that Step Assignments section now displays whether a specific assignment has conditions defined or specific Organisation assignments:



During execution, if a step condition is not met, then the step will be created and skipped so the workflow history will be able to track the progress. If the workflow at any point returns to a step where data included in conditions is amended (In change request scenarios for example), then the skipped steps are recalculated and can be reassigned.

2.1.3 Workflow execution in Test Mode enhancements

When executing a workflow in test mode, it is quite time consuming to navigate through the workspace and open the steps to complete them.

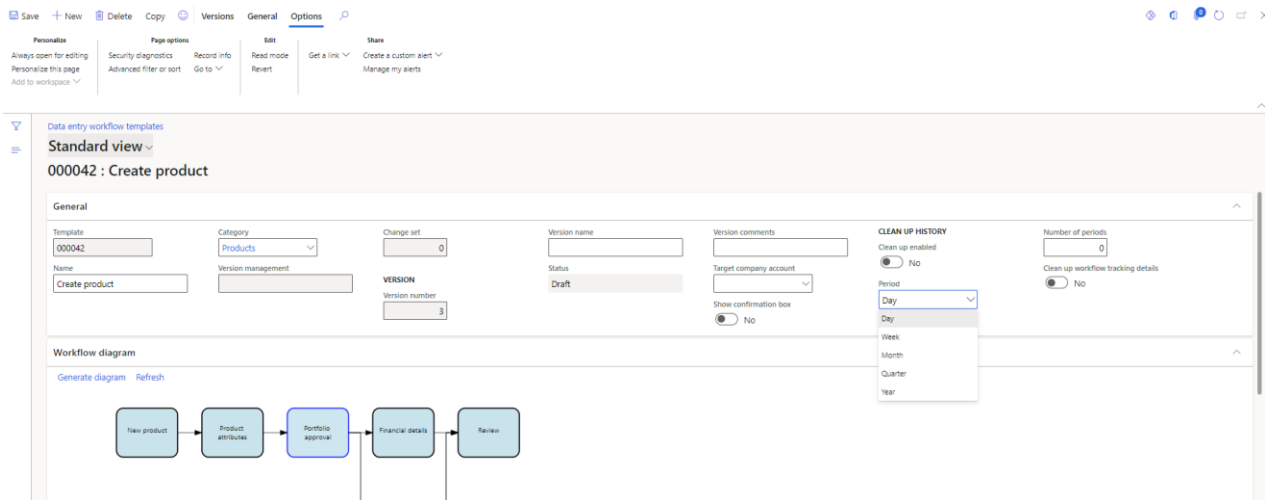
Instead, when running a workflow in test mode, the next step that is created will now automatically open after the previous step has been completed.

2.1.4 GDPR compliant - Clean-up of Staging data

As workflows get executed and staging data get stored there will be eventually the need to clean it up. Whether is for GDPR compliance or simply to clear up space, we have now added a clean-up process that can be used to delete the staging data based on setup.

Therefore, on the workflow template, we now have the following setup that can be used to enable the clean-up process:

- Clean-up enabled – Check if the clean up process needs to consider the staging data created for the template
- Period : Day/Week/Month/Quarter/Year – Define the period that that should be considered
- Number of periods: In corelation with Period, we can control what staging data to clear based on its age. For example if we set the period to Month and Number of periods to 1, the process will clear all data order than 1 month.
- Clean up workflow tracking details – Control whether we want to clear the workflow history & tracking details as well.



Once the setup is done, a new process can be scheduled to run in batch mode. The process is called Clean-up history and it can be found in the Periodic section of the Data entry workflow module. In the process prompt, you can either select a specific template to run the process for, or leave it blank to run for all templates.

Clean up history

?

Parameters

^

Template

Run in the background

v

OK Cancel

3. Bug Fixes

Internal

- Cancelling an Approval step does not reset the Status back to Assigned
 - Fix: For approval steps, if we access a workflow step assigned to us and then press the cancel button to exit, the step will have its assignments redone.
- Getting 'Object reference not set to an instance of an object' error when there are no templates defined in the system
 - Fix: Reworked the code to fix the error.
- Cancelling an 'In Progress' workflow should update the 'Last action at' & 'Last action by' fields on the workflow
 - Fix: The 2 fields are now updated when we are cancelling an In progress workflow.
- Field Picker - sometimes the design looks empty when the field recording starts.
 - Fix: The focus is now correctly set when the field recording starts.
- 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.
- Auto-refresh list grids on workspace after completing a step.
 - Fix: After completing a the Open tasks assigned to me section was not refreshing and kept showing the step that was just completed.

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 Manufacuri... | | × |
| 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 | 🔒 | |

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?

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- 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.

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.