TO INCREASE

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Release Notes for Data Entry Workflow 10.0.36.11

Release Notes

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Document Information

Title	Release Notes for Data Entry Workflow 10.0.36.11
Subtitle (Subject)	Release Notes
Solution Suite	DEW; Data Entry Workflow
Category	Release Notes
Author	Marius Rusu
Published Date	10/6/2023
Status	Final
Comments	[Comments]

1.   Introduction

1.1   Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.36.11 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.33 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 10.0.36.11
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.

1.4   Product Release information

Data entry workflow 10.0.36.11 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.33. 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 10.0.36, 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.

☐
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Release date [TI-Product]	[TI-Version number]	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
05/07/2023	10.0.32.10	10.0.29	10.0.34	10.0.29 and above
6/10/2023	10.0.36.11	10.0.33	10.0.36	10.0.33 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	Workflow execution wizard layout enhancements

To bring our workflow execution wizard layout closer to what standard D365 provides, we have introduced the option to customize the way controls will be displayed during workflow execution.

#### 2.1.1.1	Tab pages

To allow for a better alignment, we have also introduced Tab pages in a workflow step. This will allow workflow designers to better split the way fields are displayed during execution and have a more authentic D365 feel in the workflow execution wizard.

By default, after installing this release, a single tab page will be created and named after the workflow step. Afterwards, the users can define as many tab pages as they like:

The same operations available on field groups are available on tab pages as well. This includes: Move up, Move down, define a configurable label, Cut/Paste field groups between tab pages.

The field picker was also enhanced to allow tab page definition inside it.
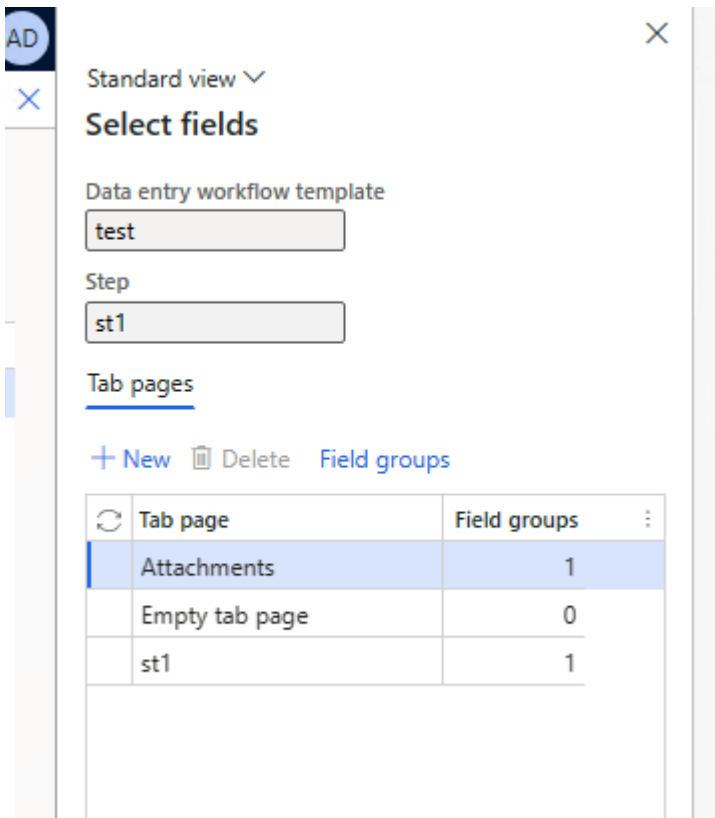
In the workflow execution, the wizard form will display the tab pages one below the other.

2.1.1.2 Field group alignment

A new parameter was added to the DEW template form on the field group level. The parameter will allow workflow designers to control how the fields included in the group will be arranged. The parameter field takes its values from the standard D365 alignment options for a group control as can be observed below

By default the value will be set to None.
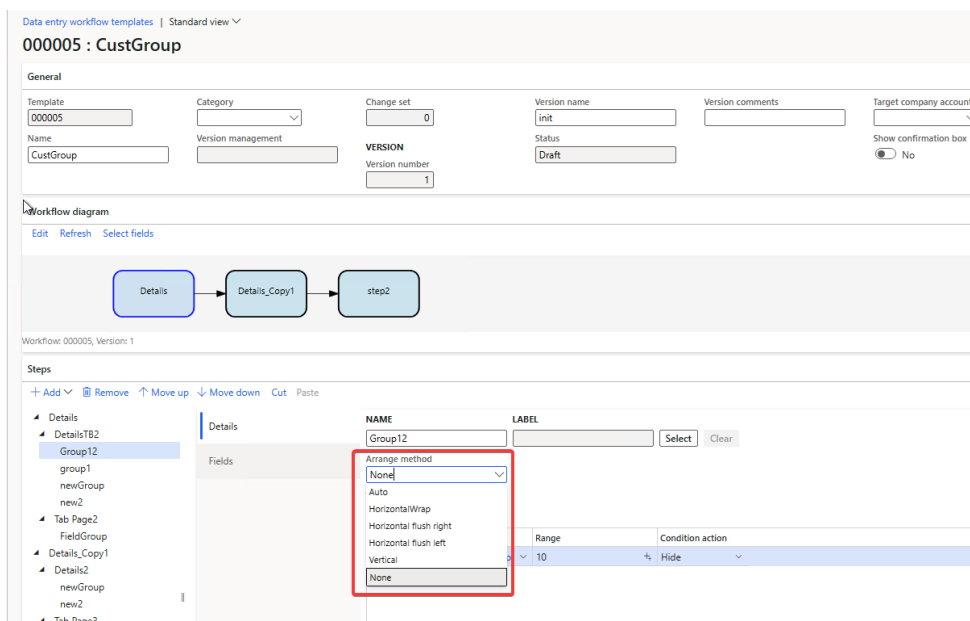
2.1.2 Multiple attachments in workflow execution

With Data entry workflow, designers can add Document or picture fields that can store data and add them as document handling entries to the final records created. These are called virtual fields of type document or picture and get added to the workflow document records.

It is often necessary to have more instances of the same field present in a workflow. To avoid having to add multiple fields in the workflow template, we have introduced the option to use the same added field but in multiple instances during workflow execution.

Therefore, on a virtual document or picture field, you can now mention whether Multiple entries are allowed or not. If this is not populated at time of creation, it can be changed afterwards on the document field.

Standard view ∨

Add document attachment field

Details ∧

GENERAL

Document record

Field name
*

Mandatory
◉ No

Write condition
◉ No

Attachment document type
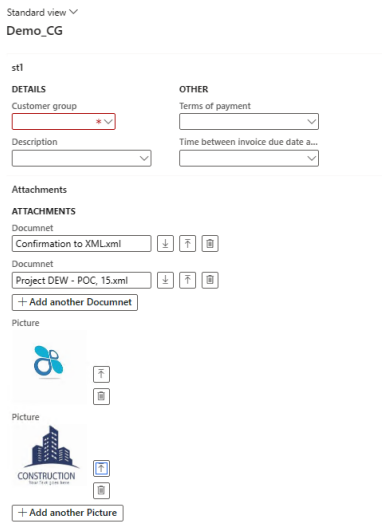* ∨

Allow multiple attachment
◉ No

Label
Overwrite | Clear

Help text

Select
Clear
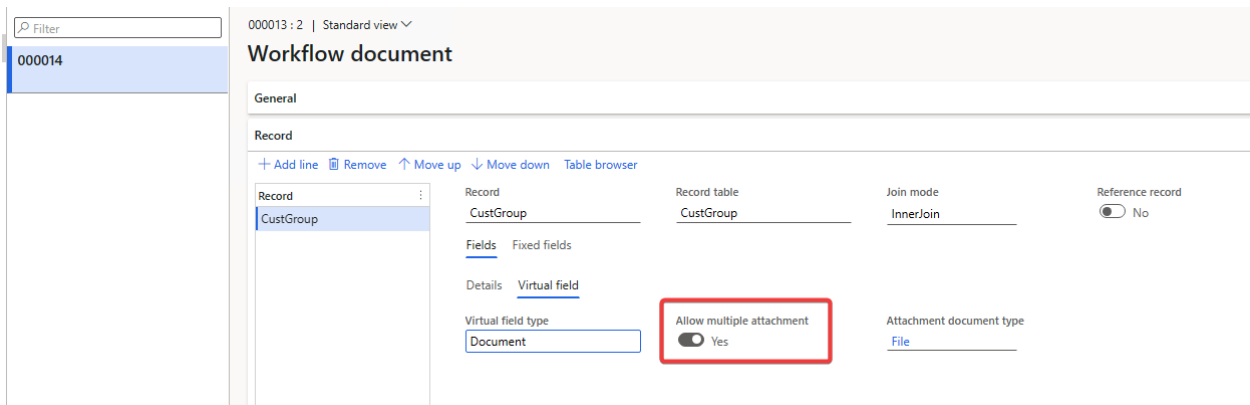
If the parameter is enabled, a new button is displayed during the workflow execution. The label of the button is based on the label of the field.
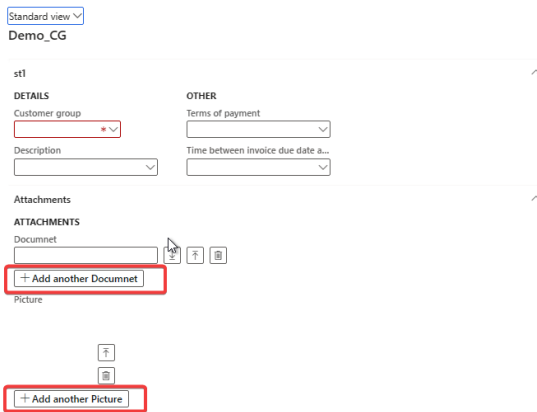
By clicking the button, a new control to upload a file or picture will be added to the dialog.

Once the workflow is completed, all pictures and documents are created and attached to the created record.

2.1.3   Conditional field visibility

In standard D365 we can have some pages where various fields or even entire field groups can be disabled/hidden if they are not relevant for the type of record created. Unfortunately, these situations are quite rare, although there may be cases where organisations may need to have such control.

To accommodate for that we have introduced the option to control various controls in our workflow wizard based on conditions. In fact, we have extended our Conditions framework (as we are currently supporting Assignment conditions and Step conditions) to Fields, Field groups and Tab pages.
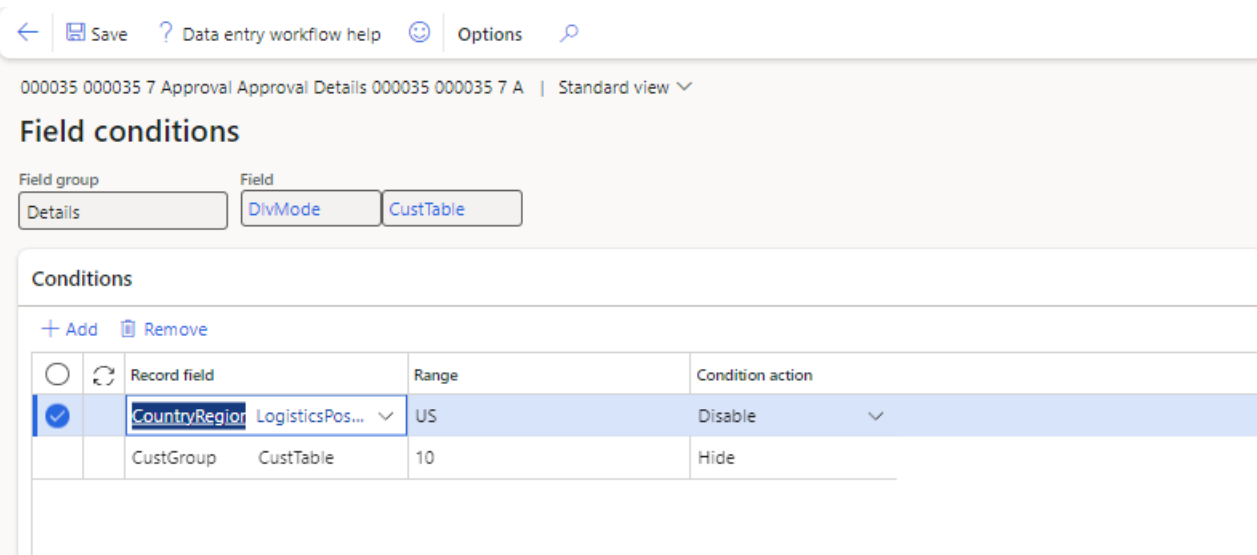
2.1.3.1 Field conditions

The most common scenario we envisaged being useful for our customers is to hide/disable a certain field if a specific condition is being met.

Therefore, on the workflow template setup we have added a 'Conditions' button where the user would go and define how should the field behave. In addition, we have also added an indicator to easily indicate whether a field has any conditions defined or not.
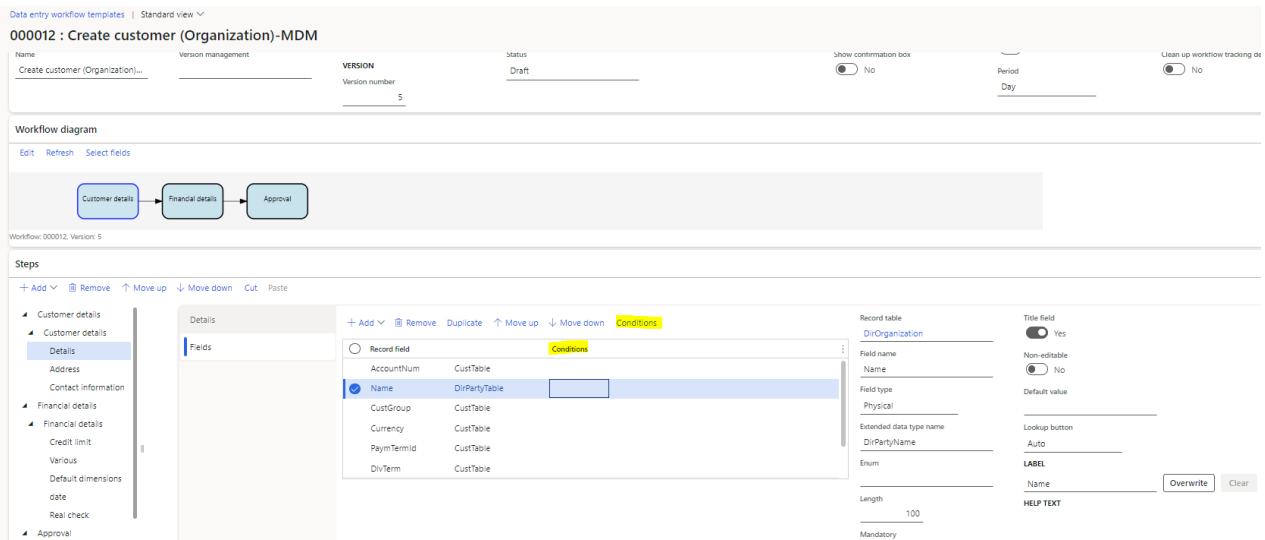
Once the conditions page has been opened, the user can define what fields are part of the criteria that needs to be met and specify the desired behaviour for the field: Hide or Disable.

If we have at least 2 fields in the condition with different behaviour (e.g., One hide and one disable) the Hide action will take priority.

During workflow execution, if the conditions defined are met, the target field will be hidden/disabled based on the condition actions.

2.1.3.2 Field group conditions

On the workflow template definition page, we are now able to add Conditions for a field group. As for field conditions, a field group can be hidden/disabled of one or more conditions are simultaneously met.

During execution, the entire field group will be hidden/disabled (hide takes priority) if all conditions are met.

2.1.3.3 Tab page conditions

The new Tab page controls that were introduced this release can also be configured to hide/disable their content, in a similar manner to how field groups are conditioned.

2.1.4   **Workflow document versioning**

During testing, we have encountered scenarios where a workflow template can have multiple execution instances that are based on different versions. Normally, this should work fine if the workflow document doesn't suffer major changes. Otherwise, instances started for older workflow versions may hit errors during the Transfer to target process (when the records are saved in the final tables).
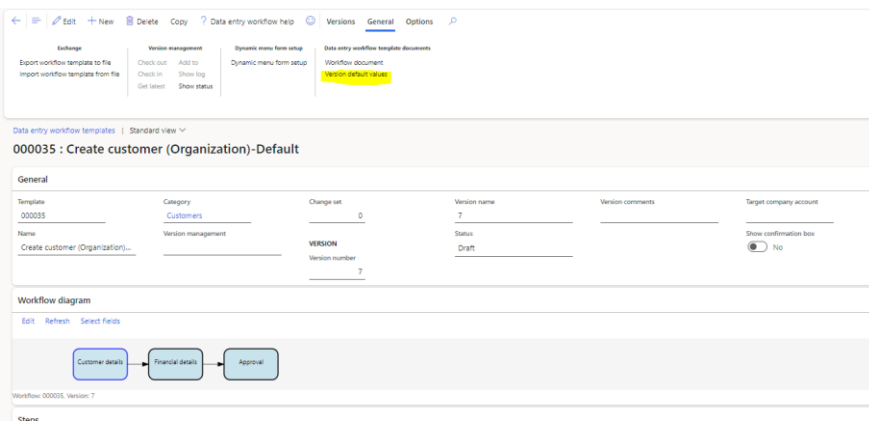
To overcome these situations, we have decided to move to a version specific document. Therefore, every time a new version is being created, a new document will be created as well and linked to the version. If the version is copied from a previous version, then of course, the document will also be copied.

To make sure we provide continuity on the existing workflows, when this release is going to be installed, the version specific documents will be automatically created.

2.1.4.1 Default values
Having version specific documents opened us the possibility to define version specific default values for fields that are not necessarily added in the workflow. Default values were supported previously as well, but the way to add them was using the Fixed relations tab. This limited the functionality when it came to editing an existing record.

To add/change the default values for a specific version, you can now use the Version default values button that was added to the workflow template screen:
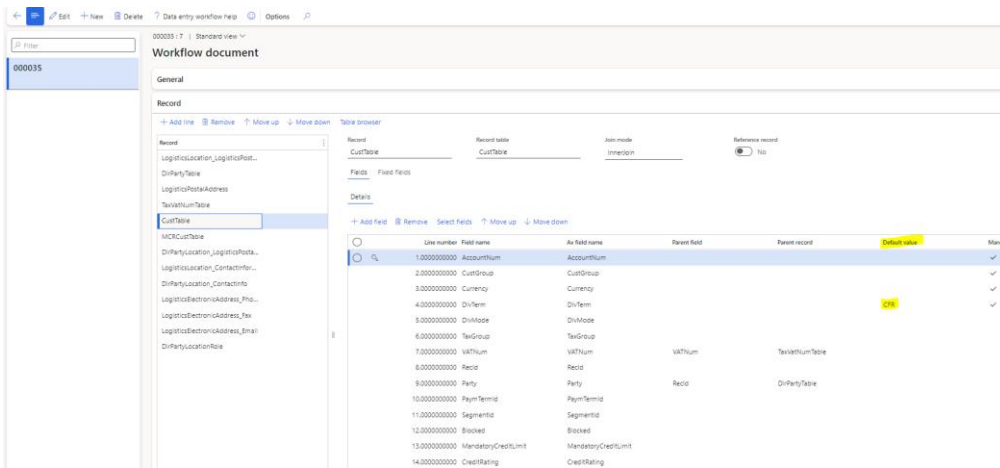

The version default values are stored against the workflow document record fields. They can be added/changed/removed from there as well:

Once a default value is added to the document record field, the value will also be visible on the workflow template step field. The value can be overridden if needed.

During the installation of this release, the values set in the fixed relations will be transferred to the Default value field. The fixed relations section will only be used to control the logic that allows editing a record using a data entry workflow.

2.1.5　Enhanced duplicate checks based on the Fuzzy logic duplicate checks from Data Quality Studio

Data Quality Studio has recently added a new feature that improves the ability to identify duplicates. The logic is called Duplicate fuzzy matching and it has been introduced in the previous release (10.0.34.6) and enhanced with this release (10.0.36.7).

Information about the feature functionality can be found in the original release notes of Data Quality Studio.

Because this feature provides a very nice way of identifying duplicates, we have decided to extend Data entry workflow and take advantage of it. To enable this, you will need to have the latest version of Data Quality Studio as well.

From a workflow perspective, the way we decided to implement the fuzzy matching duplicate check is as follows:

1. Once a workflow template step is completed, the data is saved in the staging area.
2. At that point, if you want to validate that your already entered data is not a duplicate record, you have the option to define a new type of step in the workflow. The new step will not hold any fields in it, but it will just try to check if the data already entered can be considered a duplicate.
3. If the fuzzy matching logic detects the data entered as a duplicate, the workflow will show the assigned users with any potential duplicates.
4. Once analysed, the user will have the option to accept the record as not a duplicate or reject it if it's considered a duplicate.
5. If the check done on step 3 does not detect any duplicates, then the fuzzy matching step will simply be skipped, and the workflow will move to the next step.

To define a new a new fuzzy duplicate check step, we follow the same Add step procedure as for standard steps:

My view ⌄

Add template step

Step details ⌃

GENERAL

Step name

Duplicate check - fuzzy

Description

Type

Fuzzy duplicate check ⌄

Transfer to target

◉ No

Fuzzy duplicate check

* ⌄

INTEGRATION

Auto-complete

◉ No

Time unit

Minutes ⌄

Time length

0

Header instructions

Footer instructions

Once we have selected the type of Fuzzy duplicate check, we will have to also select which of the defined fuzzy duplicate checks we want to use. This can also be changed later directly on the step.

After defining the step and its assignments, the workflow is ready to be used.

When the workflow execution reaches the fuzzy duplicate check step and duplicates are detected, the workflow wizard will show the workflow as below. On that page, the user will be able to decide what to do with the workflow:

1. Approve (not a duplicate) – meaning the workflow will go forward and the next step will be created and assigned.
2. Reject – means the record is a duplicate. A reject reason is required (default text is 'Reject duplicate'). The workflow will be updated to cancelled and the reject reason will be added as a document handling entry linked to it.

My view ∨

CustGroup

TEST MODE

Duplicate check ⌃

Duplicate check constraint name: Fuzzy Duplicate check

CURRENT RECORD

BankCustPaymIdTable	ClearingPeriod	CustGroup	DefaultDimension
		1012	

DUPLICATES FOUND

Score ↓	BankCustPaymIdTable	ClearingPeriod	CustGroup	DefaultDimen
100.00	68719476736	Net30	10	0
100.00	0		110	0

[Approve (not a duplicate)] [Delegate ∨] [Reject (duplicate) ∨] [Save and ∨] [📎 Attachments] [Cancel]

3.   Bug Fixes

Internal

- Duplicate entries in Data workflow template selection screen when creating new records on standard forms:
  - Fix: The behaviour was present when the user was part of 2 assignment groups (e.g 1 team and 1 security role) on the first step of a template. We have now fixed this behaviour.
- Automatically switch focus to Detailed view when only 1 workflow is present in the environment.
  - Fix: We have corrected the behaviour to follow the standard one when navigating to a list page.
- Field group missing when starting field recording if the field group was created pre-emptively.
  - Fix: The field picker will now show all available pre-created field groups, even if they don't contain any fields.

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.

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.

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.