Release Notes for Data Quality Studio 10.0.44.15

Release Notes

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Title	Release Notes for Data Quality Studio 10.0.44.15
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1. Introduction

1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Quality Studio (DQS) 10.0.44.15 from Staedean. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Supply Chain Management, 10.0.41 and higher.

1.2 Audience

This document is intended for new users of Data Quality Studio partners and customers. Some knowledge of Dynamics 365 for Finance and Supply Chain Managementis assumed.

1.3 Deliverables

Deliverable	Description
Solution package	Data Quality Studio is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Data Quality Studio 10.0.44.15
Release notes	This document is provided with the Data Quality Studio product deliverables.
Implementation methodology	The solution package contains a Data Quality Studio implementation methodology that provides detailed step-by-step instructions on how to install, learn, and implement Data Quality Studio.
Getting started BPM library	The solution package includes Getting started with the Data Quality Studio BPM library. This library contains several task guides that showcase some of the key capabilities of Data Quality Studio.
Documentation BPM library	The solution package includes a Data Quality Studio documentation BPM library. This library contains a comprehensive set of task guides that document how to use Data Quality Studio for your BPM activities. This documentation is provided in U.S. English only.
Authentication assets	A STAEDEAN security certificate is provided to allow trusted installation of the provided solution and ISV license files.

1.4 Product Release information

Data quality studio 10.0.44.15 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0.44) is built upon D365 version 10.0.41. 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 10.0.41 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.44, we recommend applying our Staedean 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.

Release date	Staedean Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
09/02/2024	10.0.38.9	10.0.35	10.0.38	10.0.35 and above
11/04/2024	10.0.39.10	10.0.36	10.0.39	10.0.36 and above
22/07/2024	10.0.40.11	10.0.36	10.0.40	10.0.36 and above
01/10/2024	10.0.41.12	10.0.36	10.0.41	10.0.36 and above
31/01/2025	10.0.42.13	10.0.39	10.0.42	10.0.39 and above
28/03/2025	10.0.43.14	10.0.40	10.0.43	10.0.40 and above
11/06/2025	10.0.44.15	10.0.41	10.0.44	10.0.41 and above

In case of an Error, Staedean may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. Staedean 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 - Staedean

Note: If client is using Data entry workflow, then it is recommended to upgrade data entry workflow to the latest version, version 10.0.44.21.

1.5 SHA256 algorithm for licenses

You may have already been informed by Microsoft, that licenses that are generated using the SHA1 algorithm will no longer be supported starting at Microsoft Dynamics 365's F&SCM version 10.0.39. This update will be generally made available by Microsoft on March 15th 2024.

As we currently use the SHA1 algorithm for our licenses, there is an action for you to take to ensure you can continue using our services. We introduce the new SHA256 algorithm for our licenses, which will be supported going forward by Microsoft.

- What do you need to do before updating to version 10.0.39?

- Please go to the Solution Management Workspace in your F&SCM environment

Retrieve and install these licenses based on the SHA256 algorithm. You can find a guide on how to do that under this link

After retrieving and installing the new license, you can upgrade to version 10.0.39 without any interruptions to our services.

There should be no effect on any of your performance. In case you experience any effect, please reach out to us under customeroperations@staedean.com

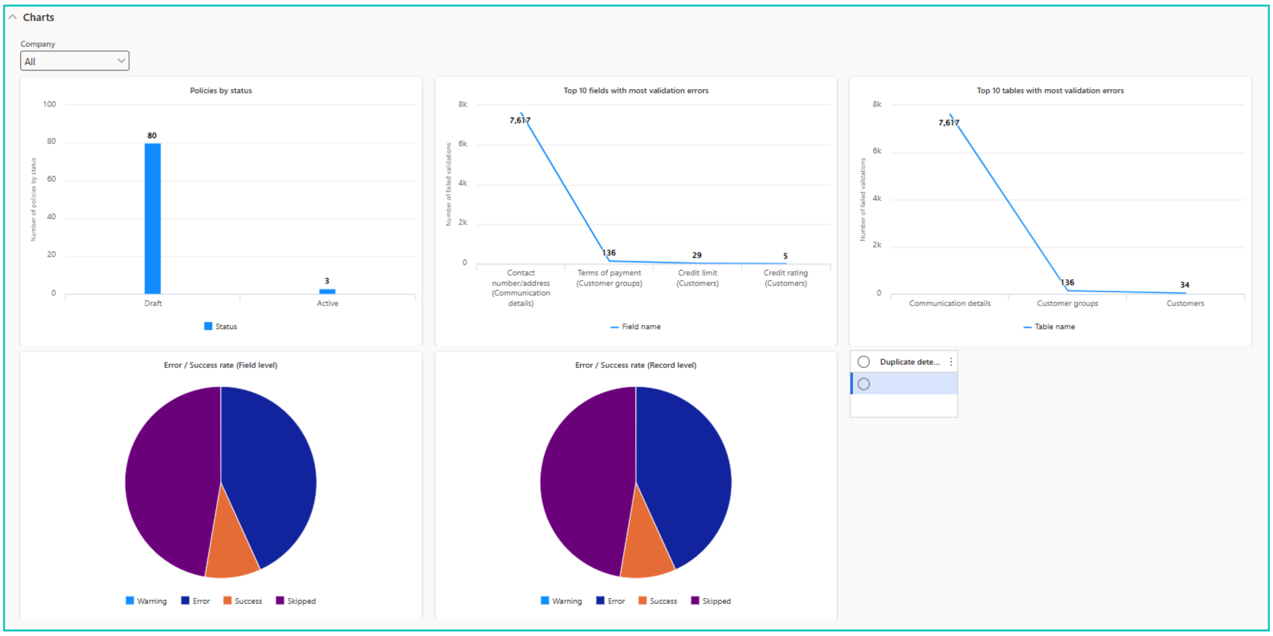
2. What's New

2.1 Current release

2.1.1 Data Quality Studio - Dashboards

In the Data Quality Studio workspace of Data Quality Studio, we have introduced a new section named **"Charts"** on the Data Politics Studio work page. This new feature is designed to provide users with insightful Key Performance Indicators (KPIs) that help in understanding the health of the data within the application. The following KPIs have been introduced:

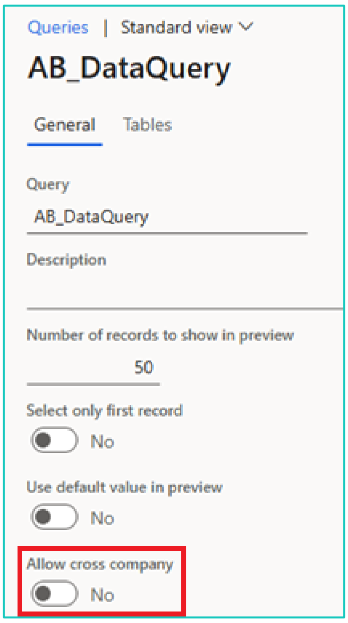
1. **Policy by Status:** This KPI provides an overview of the status of the policies, helping users to quickly identify which policies are active, inactive, or require attention.
2. **Top 10 Fields with Most Validation Errors:** This KPI highlights the fields that are most frequently encountering validation errors, allowing users to focus on areas that may need data quality improvements.
3. **Top 10 Tables with Most Field Validation Errors:** This KPI identifies the tables that contain the highest number of field validation errors, providing a broader view of data quality issues across the application.
4. **Error and Success Rate at Field Level:** This KPI presents the error and success rates enabling users to assess the accuracy and reliability of data at a granular level.
5. **Error and Success Rate at Record Level:** This KPI shows the error and success rates for entire records, offering a comprehensive view of data quality across different records in the application.
6. **Duplicate Detection Rate:** This KPI measures the rate at which duplicate records are detected, helping users to maintain data integrity by identifying and addressing duplicate entries.



These KPIs will significantly enhance your ability to monitor and improve data quality within the Data Politics Studio.

2.1.2 Cross Company Support in Dynamic Query

As per the existing implementation of Dynamic queries, dynamic queries were executed only within the company in which the user was currently working. This meant that checks for duplicate records or other validations were limited to the current company. With this enhancement, users can now specify whether a particular query should be executed across all legal entities configured in the application.
A new toggle button named "Allow Cross Company" has been introduced on the dynamic query form.



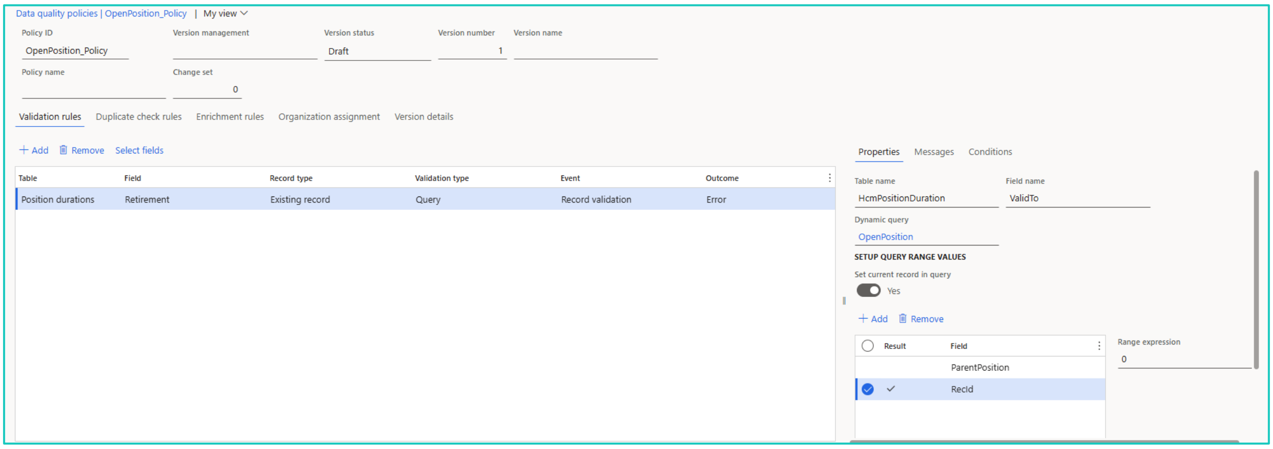
By default, this toggle button is set to "No" for new queries, meaning the query will be executed only within the current company. If the toggle button is set to "Yes," the query will execute across all legal entities.
For existing dynamic queries, the value of the "Allow Cross Company" field will be set to "No" by default. This ensures that there will be no impact on any existing dynamic queries or the parts of the application where these queries are being used.
We believe this enhancement will greatly improve your experience with Data Quality Studio and provide you with more robust data validation capabilities.

2.2 Release 10.0.43.14

2.2.1 Query Type field validation

This release introduces a new enhancement in Data Quality Studio (DQS), specifically in the Validation Rule framework, enabling a powerful new method for validating operations using dynamic queries. This enhancement adds a new "Query" validation type, allowing for record-level validation based on real-time data conditions, significantly enhancing the platform’s decision-making logic and data governance capabilities.

As part of this update, a new validation type named "Query" has been introduced on the Validation Rule tab. This validation type is exclusively applicable to record-level validations and is not available for field-level validations.



“Set current record in query” can be marked as Yes if we want to create the query against the current record

The field which should be used for comparison should be marked as the Result field whereas the other fields can be used for setting ranges.

With this feature, users can define custom query-based validations, where the result of a dynamic query determines whether a user operation (such as create, update) is permitted on a record. The query uses runtime input values from the current record to evaluate conditions, and the operation is only allowed if the result matches a specified acceptable range.

Below are the key capabilities of this feature:

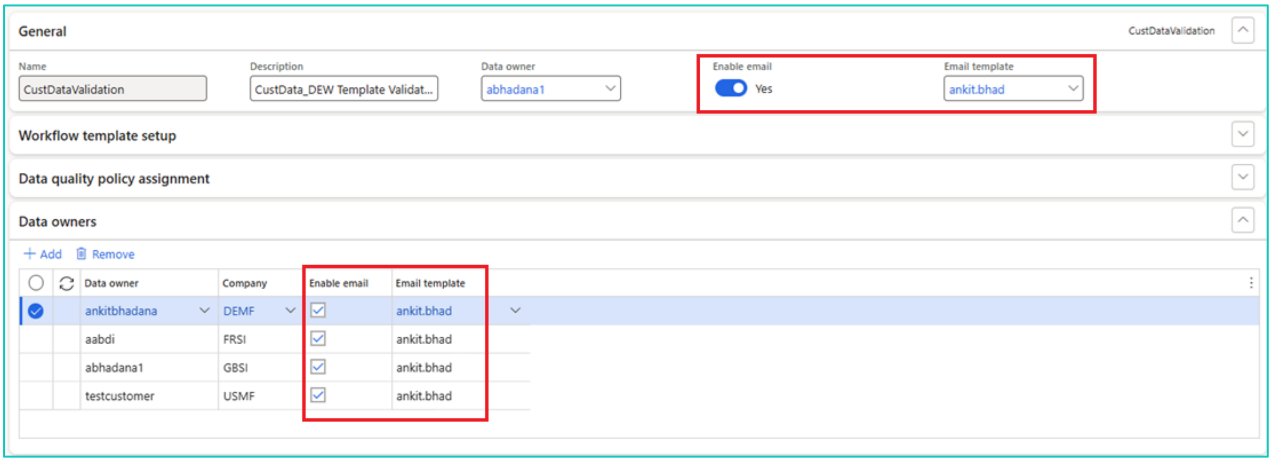
- Allows execution of a dynamic query at runtime during a record operation.
- Validates the result of the query against an expected range or value.
- Prevents the operation if the result does not meet the defined criteria.
- Supports complex scenarios where data dependencies or related entity checks are needed before proceeding.

2.2.2 Notification of quality assessment project execution results

This enhancement enables users to receive automated email notifications upon the execution of a Quality Assessment Project. The enhancement ensures that data owners are promptly informed of validation outcomes and can review detailed results attached in an Excel format, directly from their email.

As part of this functionality, users can now configure email notifications at both project and company levels, making it easier to manage communication across organizations with multiple legal entities or data scopes.

An “Enable Email” toggle is now available on the *General* accordion Quality Assessment Project. When enabled, application will allow the user to specify the email template based on which email must be triggered from the application.



Similarly, “Enable email” toggle button is available on the Data Owner grid as well, which will allow the user to configure the company specific email notification, if required.

When enabled, the system will automatically send an email to the assigned data owner once the project is executed.

Below are the benefits of this feature:

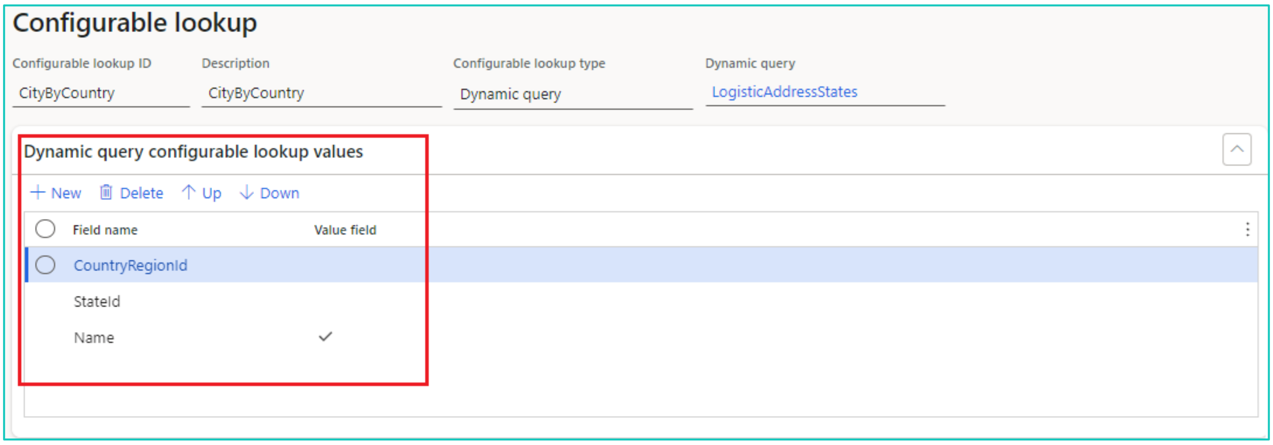
- Automates post-execution communication and improves responsiveness.
- Enhances transparency by delivering detailed validation results to stakeholders.
- Reduces manual tracking and follow-ups by embedding project outcomes into existing email workflows.
- Supports multi-company environments with company-specific configurations.

This enhancement significantly improves visibility and accountability in data quality management by ensuring timely, automated communication between the system and data owners.

2.3 Release 10.0.42.13

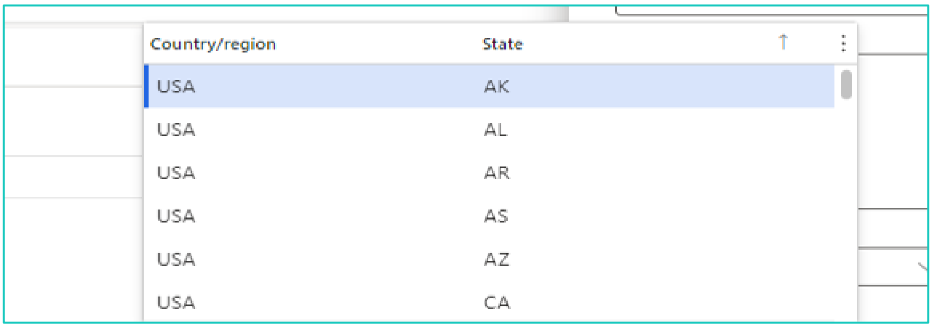
2.3.1 Ability to select field display field list

This feature allows users to select display fields for a dynamic query configurable lookup. A new grid, "Dynamic Query Configurable Lookup Value" has been added on the Configurable lookup page. This grid allows users to select fields from the dynamic query to populate the lookup.



Out of the fields specified in the grid, users can specify which field should be considered as the value from the selected line. For example, if the grid should display country name, country region name, and state, then users can configure the state field as the value for that field.

Once the data quality policy is activated, application will populate the same list of fields for the field which are configured for the configuration lookup specified for the field.

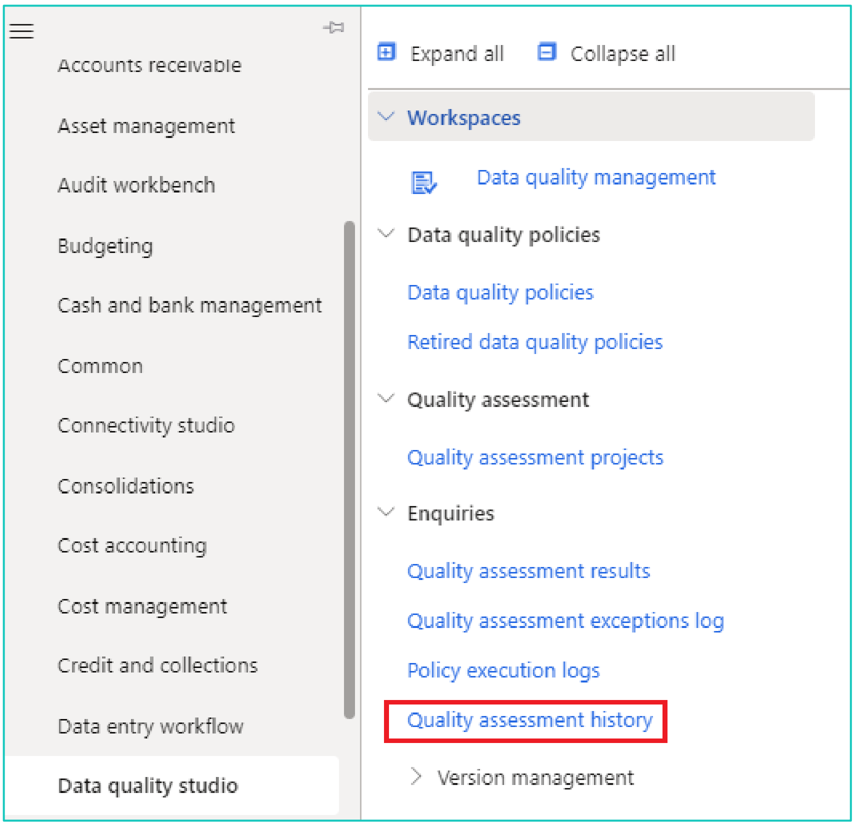


Note: Existing configuration lookups which are configured using Dynamic query need to be reconfigured. The display list (Dynamic query configurable lookup values) is needed to be configured for these lookups.

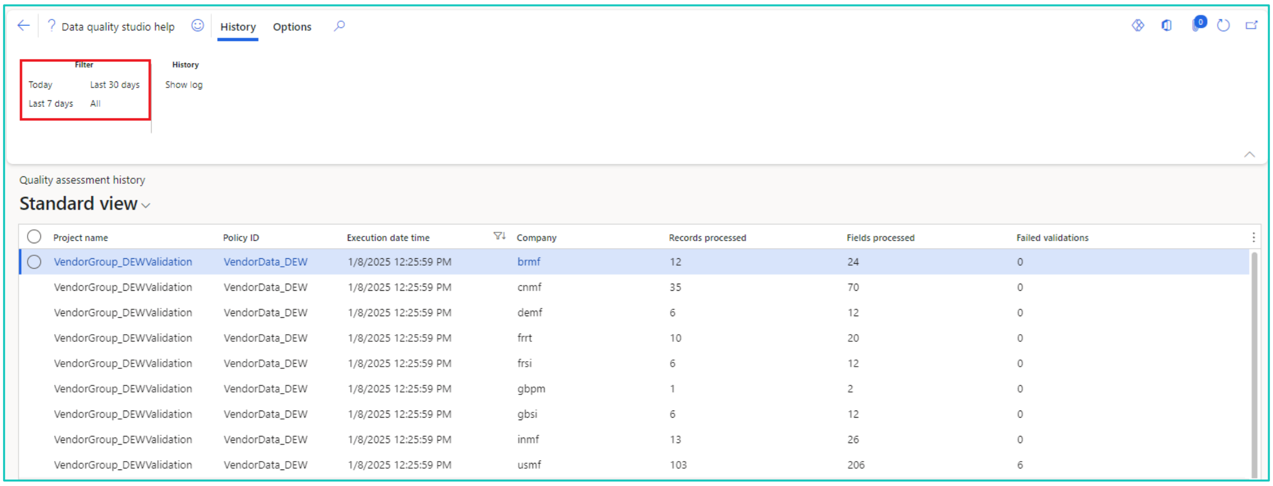
2.3.2 Quality Assessment Project Enhancement

This enhancement allows users to retain and view historical assessment execution results, providing greater insight and control over data quality assessments. Previously, every time a quality assessment project is executed, application would delete historical assessment results. With this enhancement, application will now retain historical execution results.

A new page has been introduced where users can view historical assessment results.



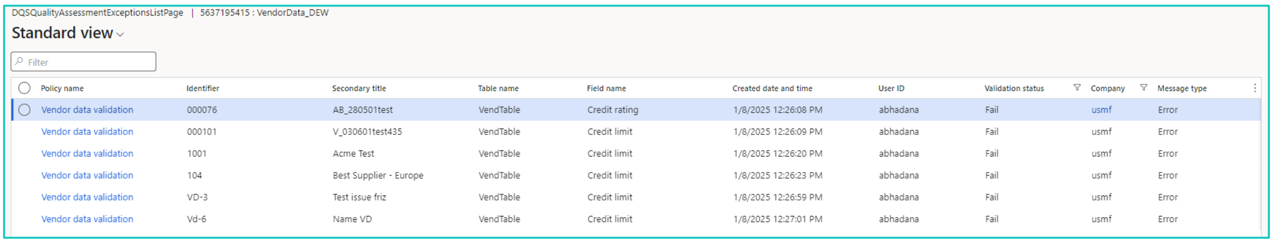
This page allows filtering of execution results based on periods such as today, the last seven days, the last 30 days, or all results.



On the Quality Assessment History page, users can view the following details:

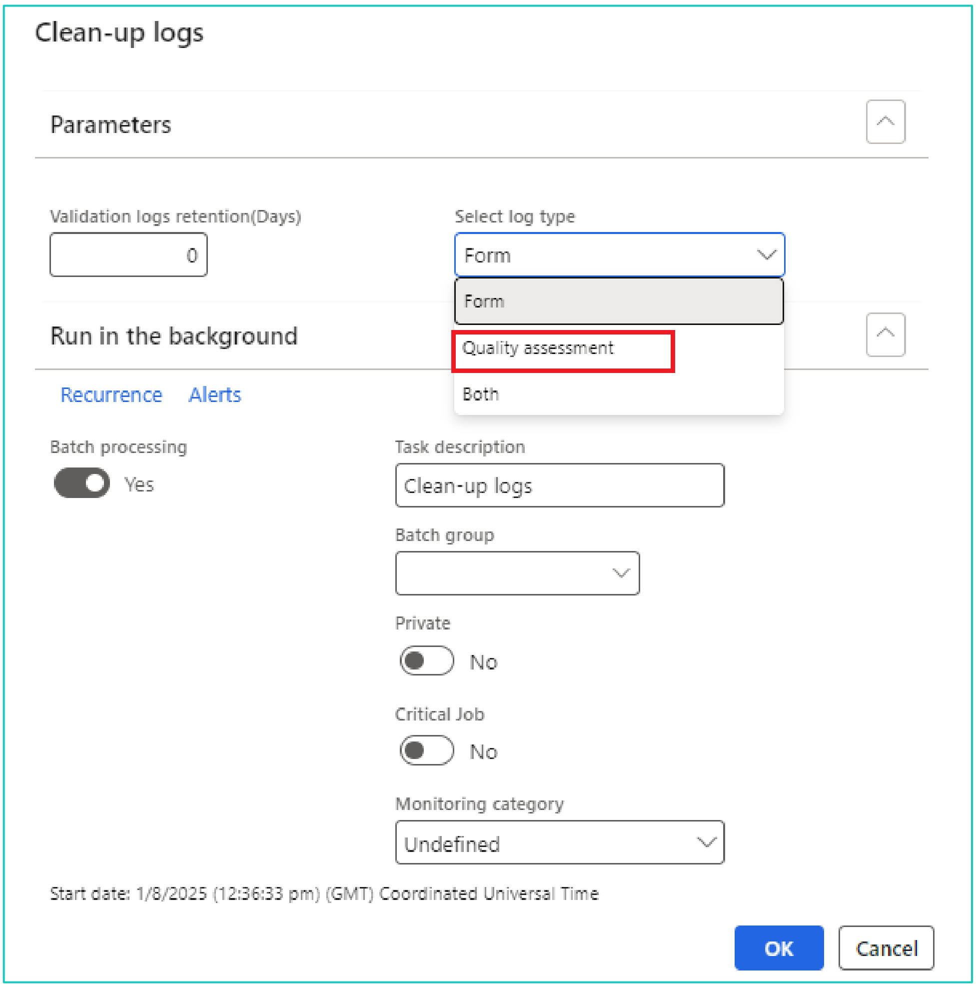
- Project name
- Execution date and time
- Records processed
- Failed validations
- Policy ID
- Company name
- Fields processed

Users can also drill down to view details of failed validations by selecting the project and clicking "Show Log," which navigates to the Quality Assessment Exception Log page.



Policy name	Identifier	Secondary title	Table name	Field name	Created date and time	User ID	Validation status	Company	Message type
Vendor data validation	000076	AB_280501test	VendTable	Credit rating	1/8/2025 12:26:08 PM	abhadana	Fail	usmf	Error
Vendor data validation	000101	V_030601test435	VendTable	Credit limit	1/8/2025 12:26:09 PM	abhadana	Fail	usmf	Error
Vendor data validation	1001	Acme Test	VendTable	Credit limit	1/8/2025 12:26:20 PM	abhadana	Fail	usmf	Error
Vendor data validation	104	Best Supplier - Europe	VendTable	Credit limit	1/8/2025 12:26:23 PM	abhadana	Fail	usmf	Error
Vendor data validation	VD-3	Test issue friz	VendTable	Credit limit	1/8/2025 12:26:59 PM	abhadana	Fail	usmf	Error
Vendor data validation	Vd-6	Name VD	VendTable	Credit limit	1/8/2025 12:27:01 PM	abhadana	Fail	usmf	Error

To manage the growth of historical logs, the existing *Clean-up logs* batch job has been enhanced to delete the quality assessment logs as well.

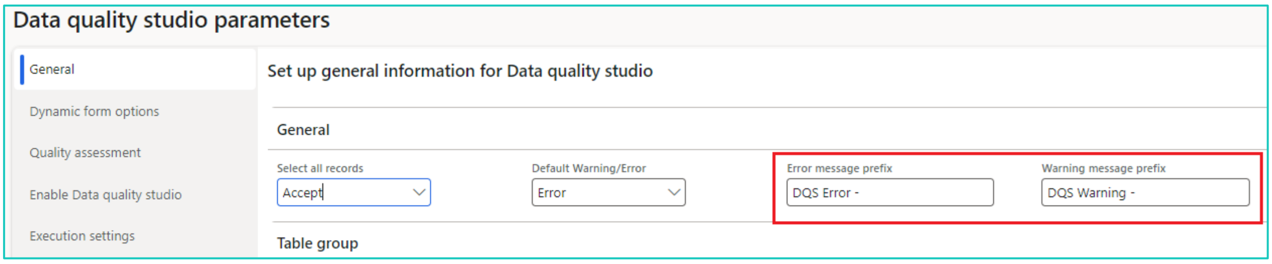


Users can specify a retention period (e.g., 10 days, 20 days) to delete logs older than the specified period. Setting the retention period to zero means no logs will be deleted.

2.3.3 Ability to differentiate between Data Quality Studio and F&SCM Error and Warning Messages

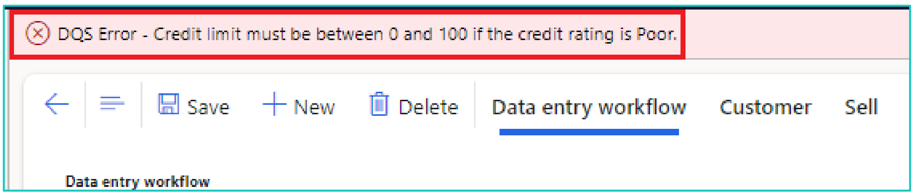
In the data quality studio, users can define validation rules for different fields within data quality policies, and custom error and warning messages can be specified to appear when validation rules are not met during data capture. However, it is not possible for the user to identify if the validation message (error or warning) is populated using the Data quality studio validation rule or in standard F&SCM validation.

This enhancement will allow the user to differentiate between the Data quality studio validation message (error or warning) and F&SCM validation messaged. For this, two new fields, Error Message Prefix and Warning Message Prefix, have been added to the Data Quality Studio Parameter page under the General tab.



These text fields allow users to specify prefixes for error and warning messages triggered by data quality validations.

When a data quality studio validation fails, application will populate the error or warning message with these prefixes.

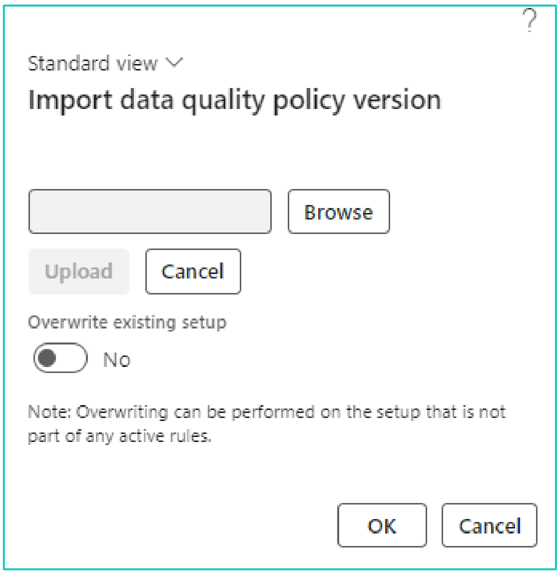


2.3.4 Ability to import/export data quality policy along with setup

The import and export functionality for data quality policies has been enhanced to include comprehensive configuration data. Previously, while importing the data quality policy, only validation and duplicate check configurations were exported, but now all related configuration data will be included.

With this enhancement, while exporting a data quality policy, all associated configuration data, such as configurable lookups, data patterns, transformation lists, and duplicate check rules, will be included.

The import functionality now supports importing all configuration data included in the export file. Users can specify whether to overwrite existing setups during import.



The "Overwrite Existing Setup" option allows users to update existing configurations, such as configurable lookups, duplicate checks, or dynamic queries, during import. Note that overwrite can only be performed on setups that are not part of active rules.

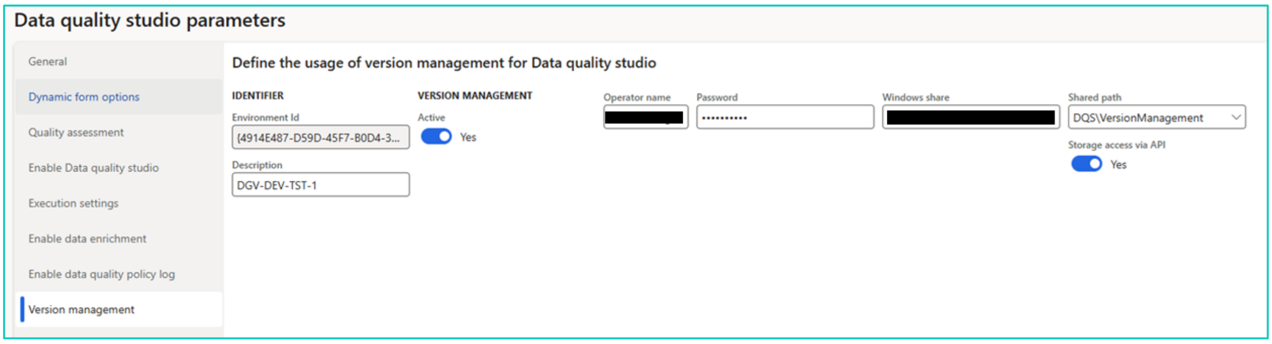
This enhancement improves data management by ensuring all relevant configuration data is included during export and import, providing a complete data quality policy transfer. It offers flexibility by allowing users to choose to overwrite existing setups, enabling seamless updates and modifications. The process of managing data quality policies is simplified, making it easier to maintain data integrity.

2.3.5 Policy version management

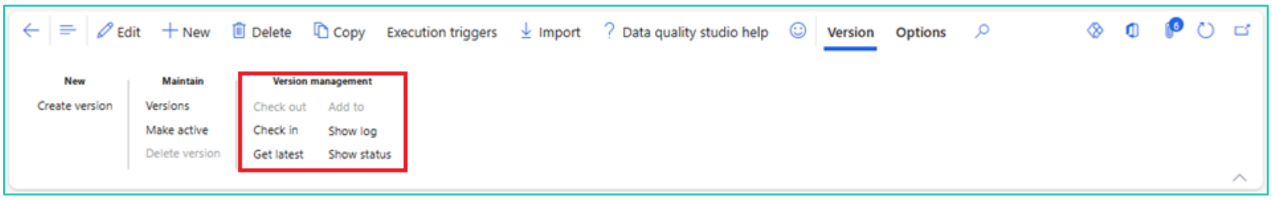
The new Version Management feature in Data Quality Studio enhances the management of data quality policies by introducing version control capabilities. This feature allows users to track changes, manage versions, and ensure the integrity of data quality policies across different environments.

To begin, navigate to the Data Quality Studio Setup page. This is where you will configure the necessary parameters for version management. On the setup page, you will find the Version Management tab, which is crucial for the setup process. On this page, user needs to specify the following details:

1. **Identifier**: A read-only field displaying the environment ID for tracking purposes.
2. **Description**: Provides a brief explanation of the version management setup, preferrable the environment name.
3. **Operator Name**: Specifies the login account id.
4. **Password**: Password for the login account.
5. **File Storage**: Specifies the path for storing versioned files, ensuring accessibility and proper permissions.
6. **Shared Path**: A network location accessible for version management.
7. **Storage access via API**: If the option is enabled, we are going to use API for the Azure file storage connection.



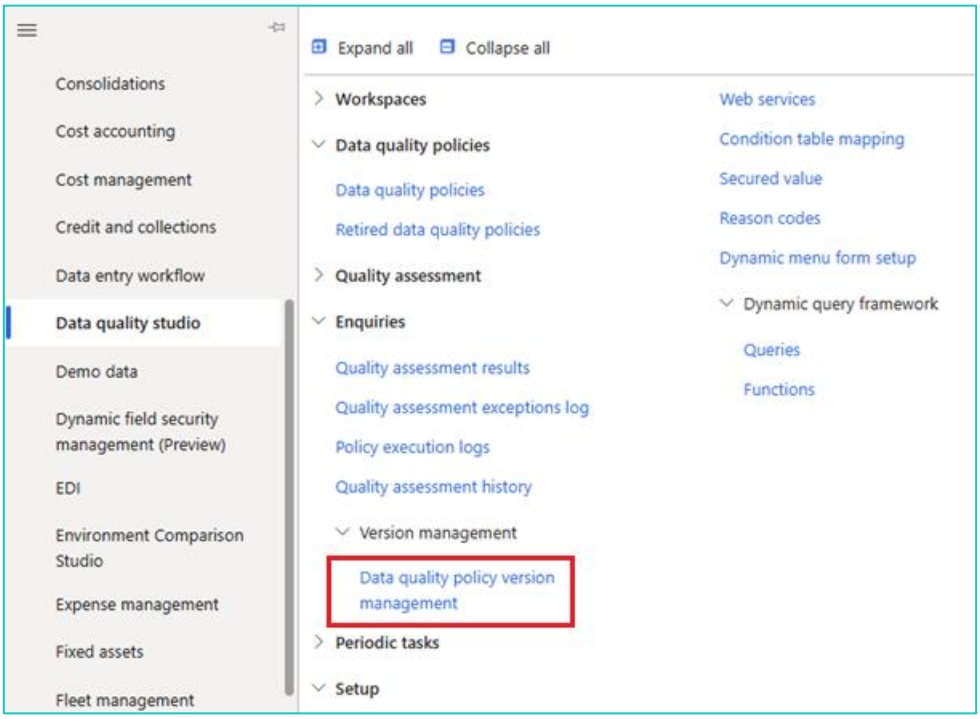
The Data Quality Policy page has been updated to include several new options under the Version action pane. A new group, named as *Version Management,* has been added on the Version action pane. This group has the following buttons:



1. **Checkout**: This option allows users to check out a data quality policy for editing. Once checked out, the policy is locked for changes by other users until it is checked back in.
2. **Add to:** This option adds a policy to version management, enabling it to be tracked and managed through the version control system.

3. **Check in**: This option allows the user to check-in the policy. On the click of check-in, application prompt a pop-up. User needs to provide mandatory comments to check-in the policy.
4. **Show Log**: This feature displays a log of all changes made to the policy, including check-in and check-out activities, along with comments and timestamps.
5. **Get Latest**: This option retrieves the latest version of the policy from another environment, ensuring that the most recent changes are applied.
6. **Show Status**: This feature shows the status of the policy, including the environment name, actual change set number and the latest change set number.

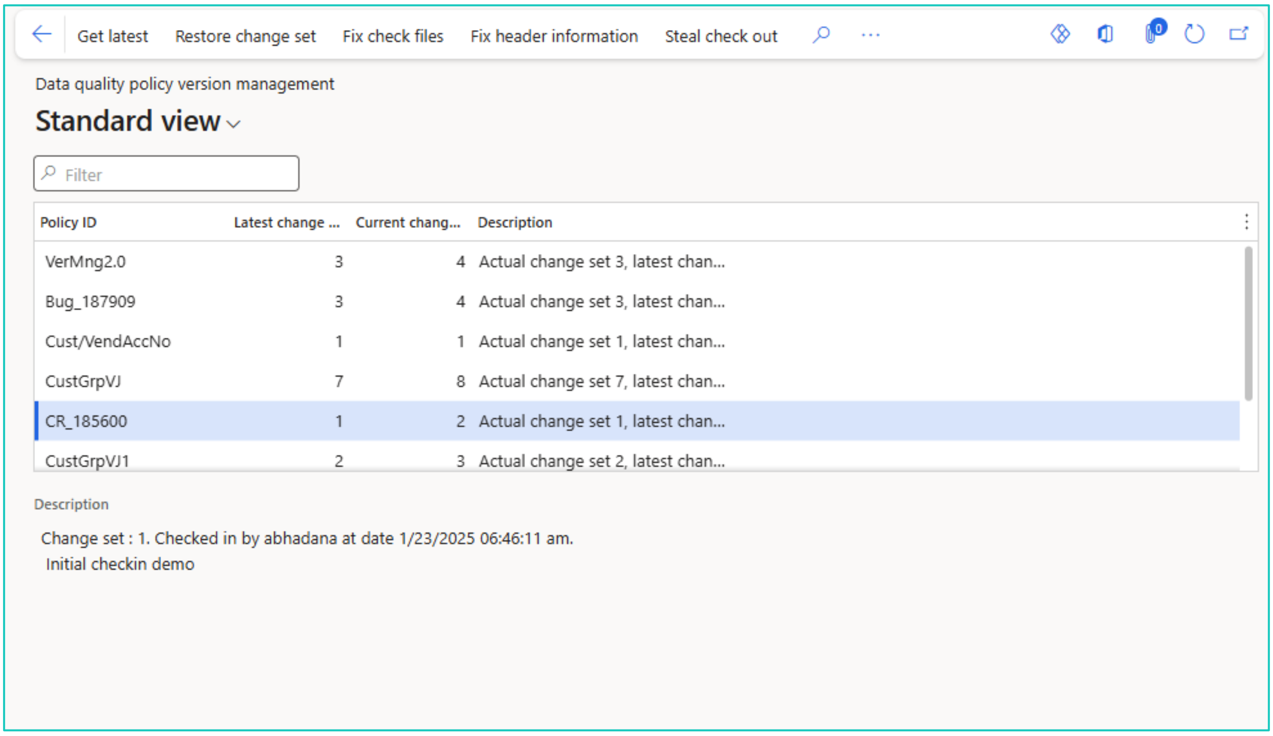
A new page, named as Data quality policy version management, has been introduced in the application, that can be accessed from the Inquire section.



The Data Quality Policy Version Management page includes several features designed to enhance the control and tracking of data quality policies. Here are the key features:

1. **Get Latest**: This option retrieves the latest version of the policy (More useful when the policy is check-in in another environment), ensuring that the most recent changes are applied. It is particularly useful for synchronizing changes across different environments.
2. **Restore Change Set**: This option allows you to revert to a previous version of the policy. You can select from a list of different versions and restore the one you need.
3. **Fix Check Files**: This feature corrects any invalid check-in file names in the application.
4. **Steal Checkout**: This option is useful when a policy is checked out by another user who has not checked it back in. An authorized user can use this feature to revoke the checkout, allowing any changes to be made. Any changes made by the user who originally checked out the policy will be lost.

These features provide comprehensive tools for managing data quality policies, ensuring that changes are tracked, versions are controlled, and policies are synchronized across different environments.



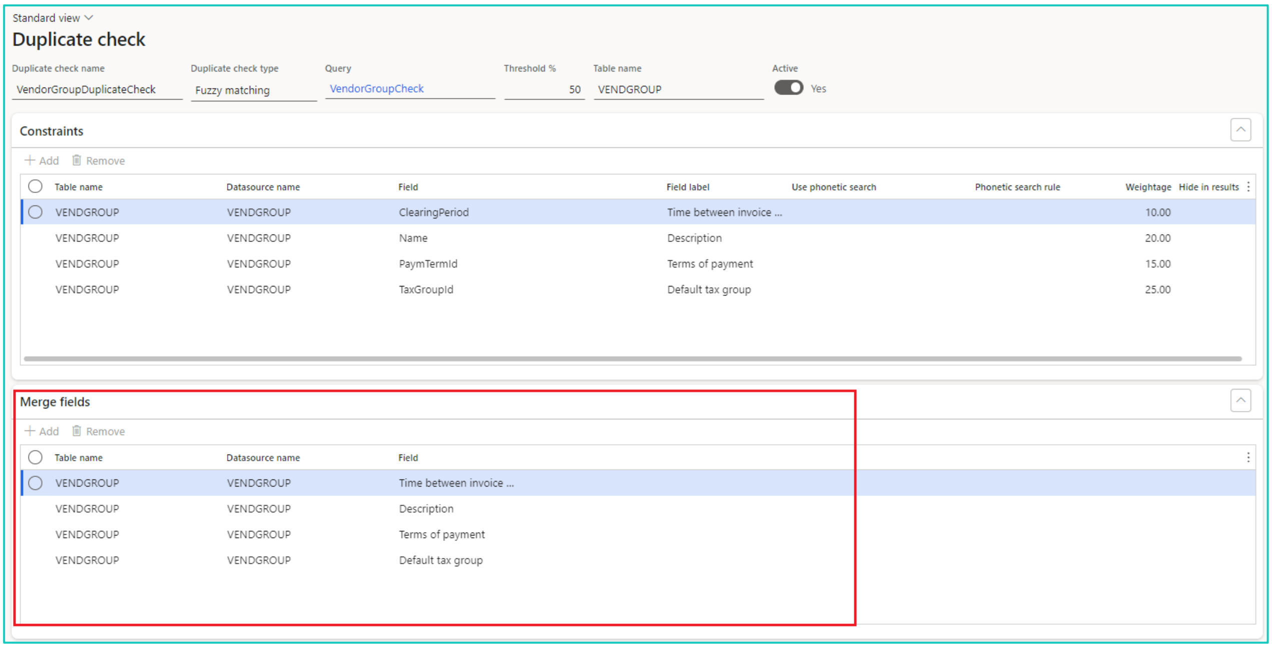
2.4 Release 10.0.41.12

2.4.1 Data Cleansing using duplicate check

This enhancement enables users to identify the duplicate records in the application and manage the duplicate record. Managing the duplicate record include following activities:

- Merge duplicate records
- Delete duplicate records

The process of identifying the duplicate records is same as in the previous version with one minor enhancement. This enhancement will allow the user to specify the fields that can be merged if the duplicate records are available for any record. On the duplicate check page of data quality policy, a new grid has been introduced:

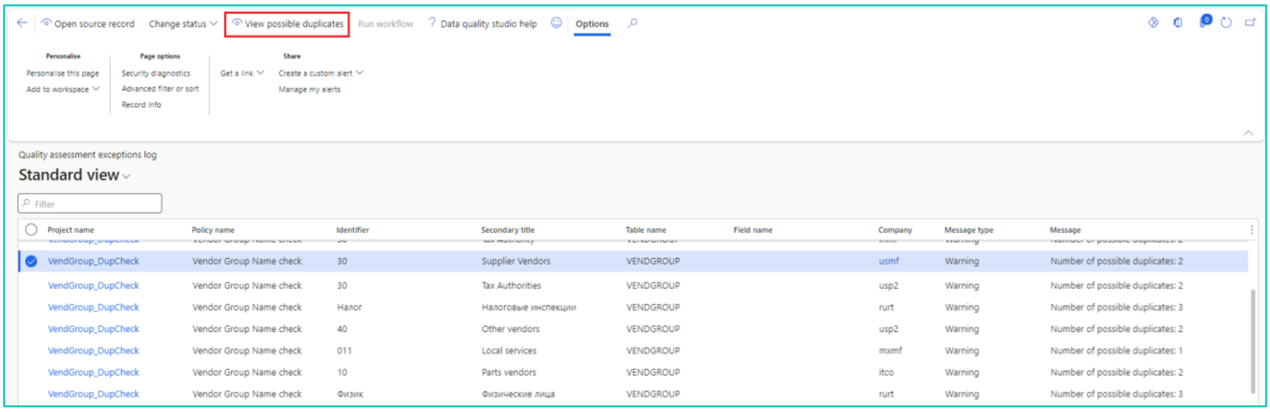


This grid is titled as *Merge fields*. This grid will allow the user to select the fields that should be available to be merged for duplicate records.

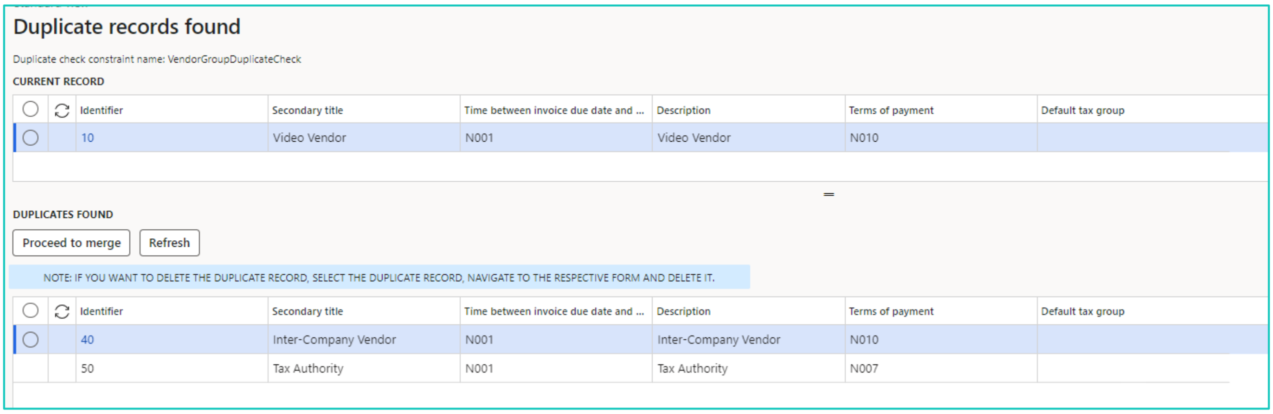
There are following options to identify the duplicate checks in the application:

- ***Via 'Quality assessment project'***: We can use an application to identify the duplicate checks to identify the duplicate records in the application for a specific company or all companies. The duplicate check results can be accessed from *Quality assessment exception log* page.

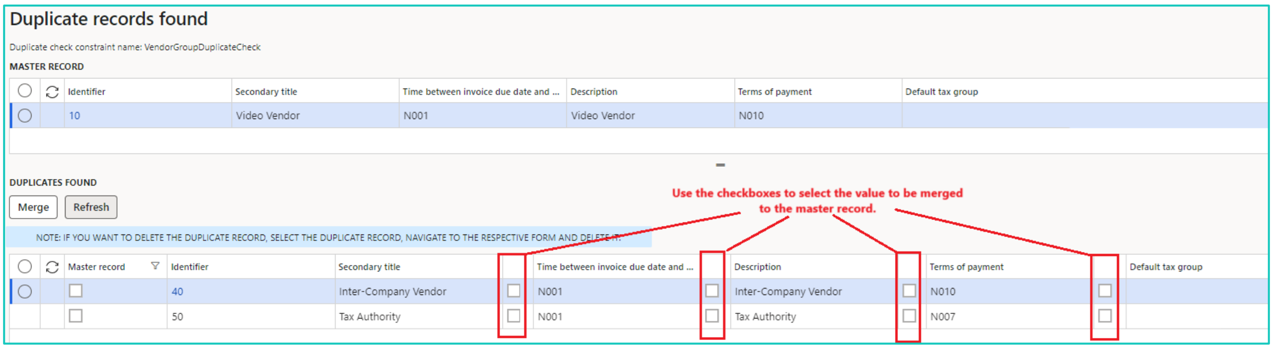
  User can click on the *View possible duplicate* button in the action pane to navigate to the duplicate records identified for the selected row in the result grid.



On clicking the *View possible duplicates* button, application will prompt a pop-up which will populate the possible duplicate records and the master record (record selected in the results grid).

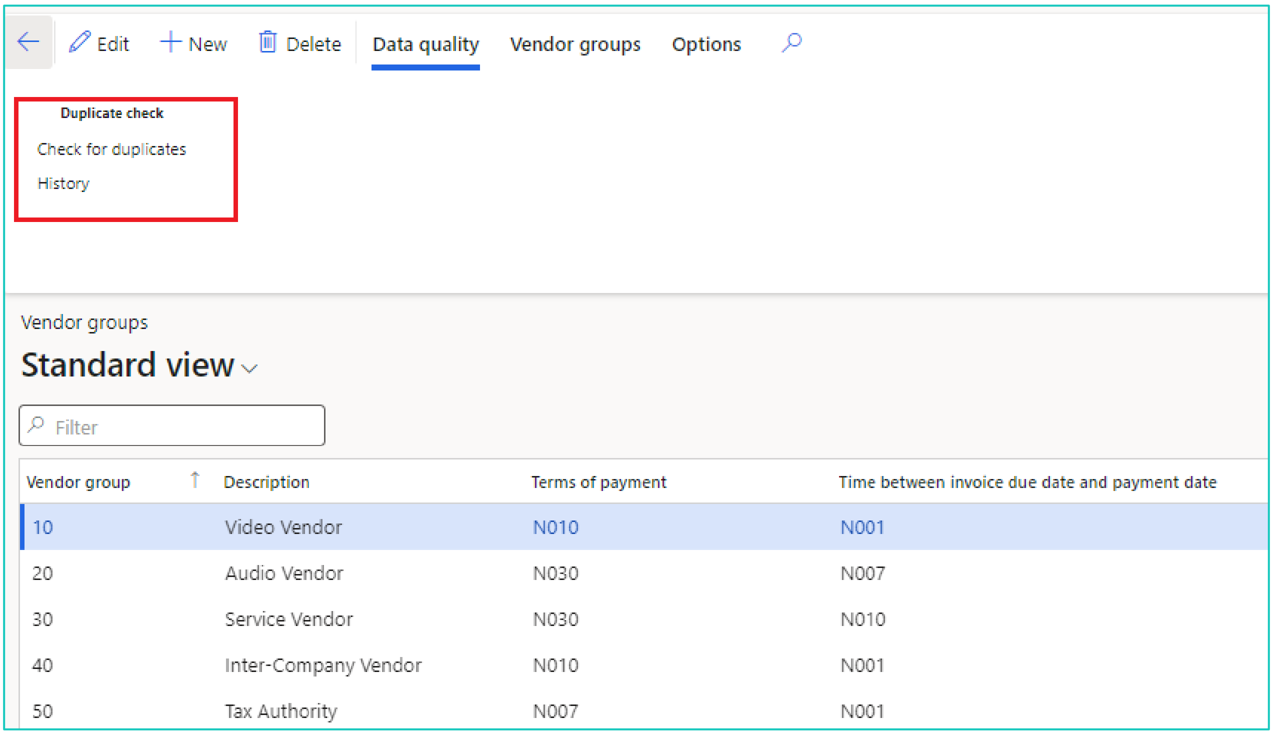


User can click on *Proceed to merge* button to navigate to the next step which will allow the user to merge the duplicate records. On this step, user can click on the select the values from the duplicate records which need to be updated for the master record. (*Note: User can switch the master record by clicking on the Master Record checkbox in the possible duplicate grid.)*

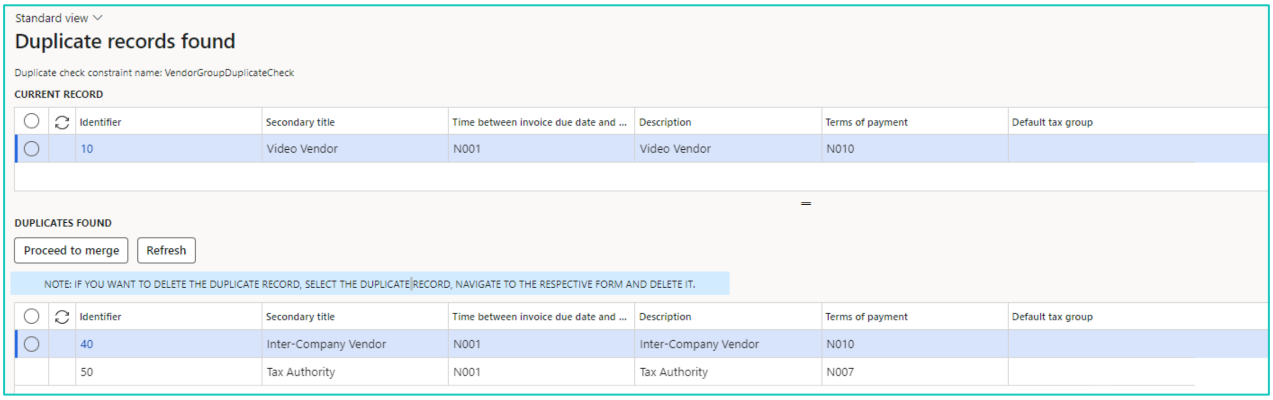


User can click on *Merge* button to merge the data. Application will prompt a confirmation message and if user confirms to merge then application will merge the records. Once the records are merged, user can open individual records by clicking on record identifier and delete the record. *Note: If a duplicate record is linked to another record, then application won't allow the* *user to delete the record, i.e. If a customer group is linked to customer, then the customer group cannot be deleted.*

- ***Duplicate check on Form***: The duplicate check feature can also be configured on an individual form using data quality studio.



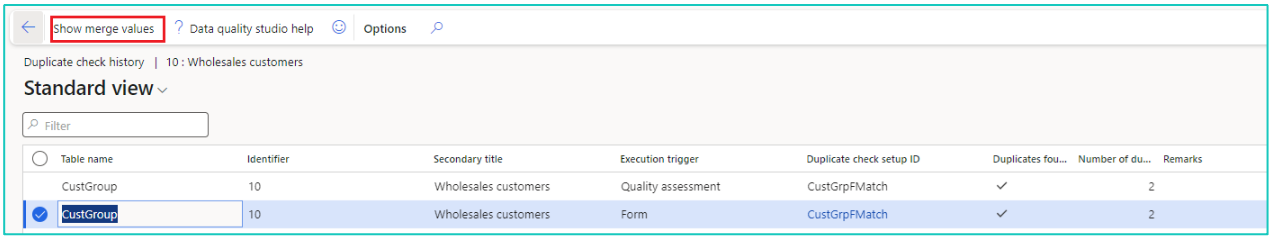
On the click of *Check for duplicates* button, application will navigate the user to another page that will populate the selected record as master record and duplicate records for the selected record (If duplicate record exist).



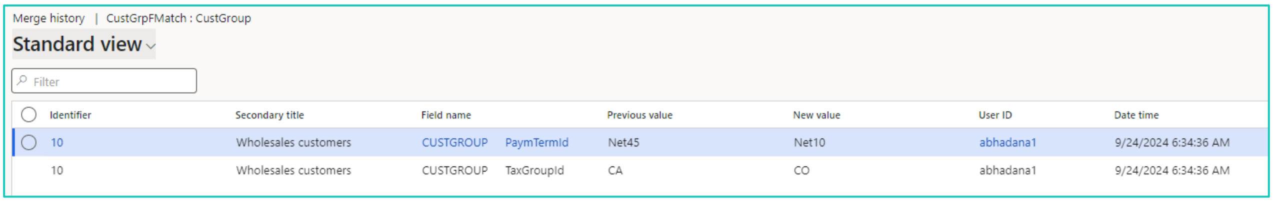
The process to merge and delete the duplicate records is same as explained earlier. Please click here to refer to the process.

User can click on History button to view the history of the view the historical values and updated values for a record, if the value of the record has been merged.

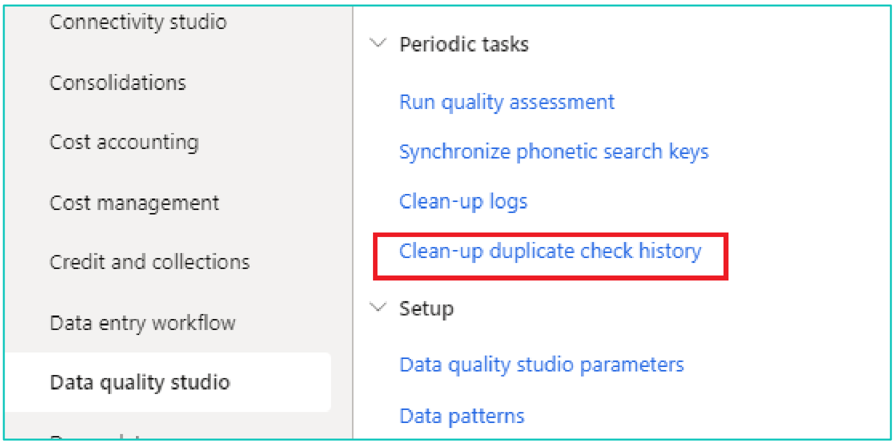
If the record has been merged, then the button *Show merge values* will be enabled.



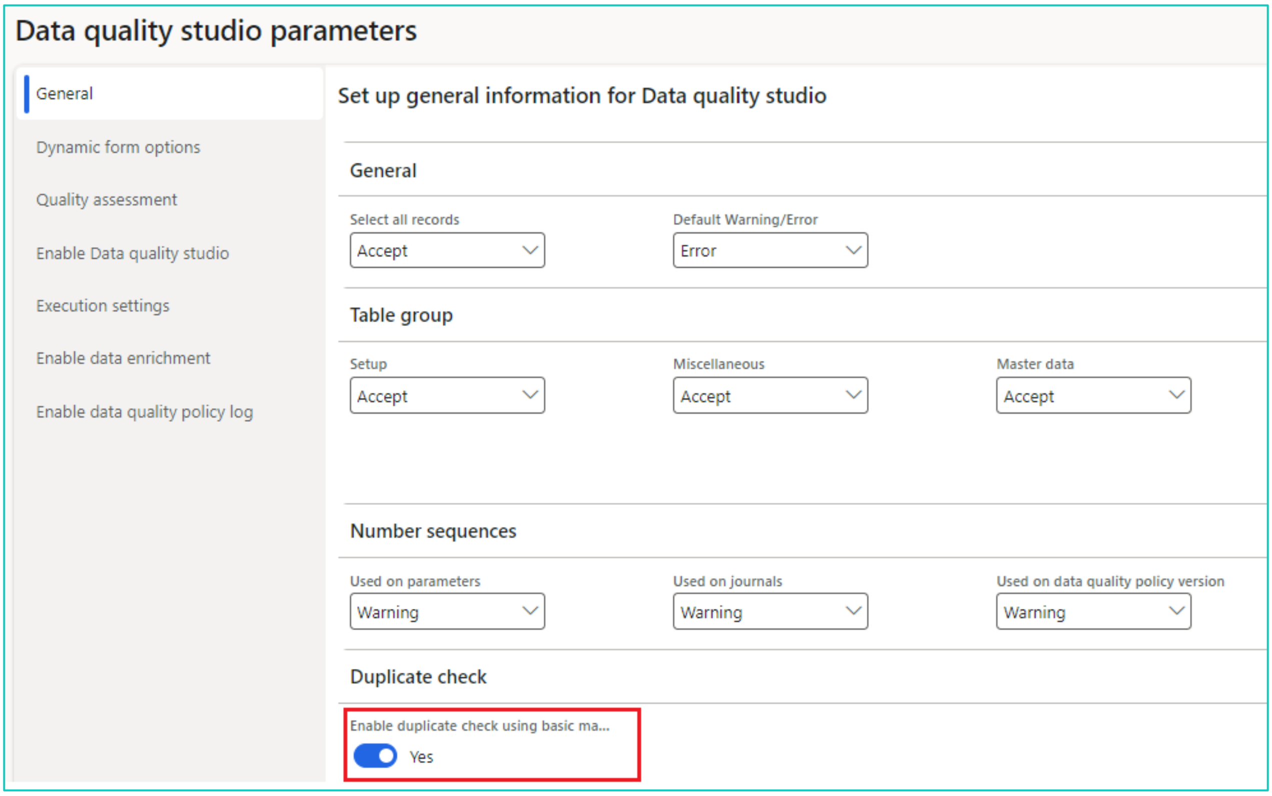
User can click on *Show merge values* button, application will navigate the user to the Merge history page where user will be able to view the merge values history.



There is a batch job, *Clean-up duplicate check history,* as well in the *Periodic tasks* section of the *Data quality studio*, that will allow the use to delete the duplicate check history.



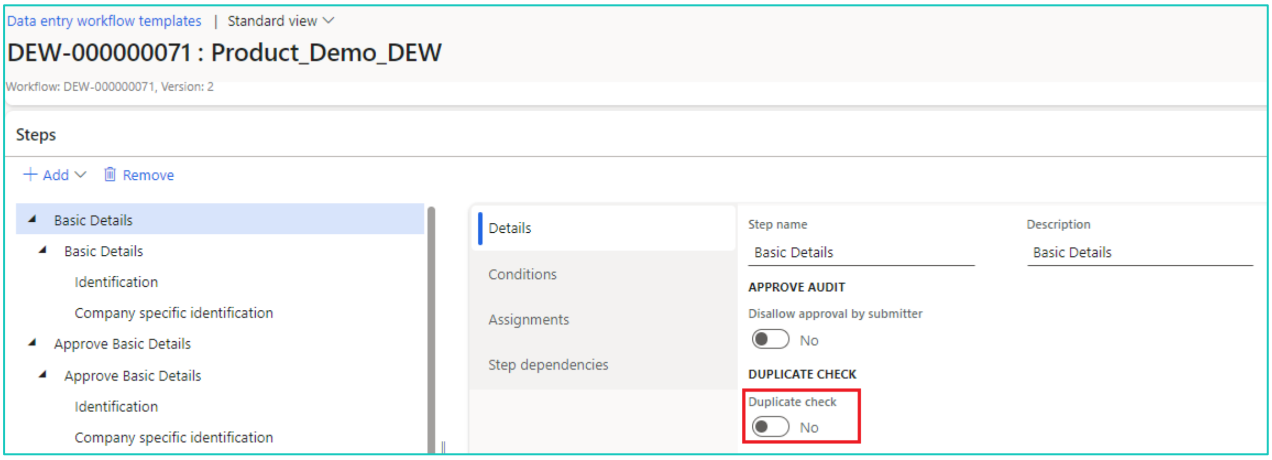
- ***Duplicate check while creating record***: This existing feature will allow a user to check for duplicate records while a record is being created. There are two prerequisites to enable duplicate check while a record is being created:
    - There must be an active data quality policy which has a duplicate check (Type: Basic matching) configured.
    - On the Data quality studio parameter page, General fast tab, the *Enable duplicate check using basic matching* flag must be ticked.



As soon as user clicks on the Save button, application will prompt the *Duplicate record found* page. The process of merging and deleting the duplicate records remains the same. Please click here to revisit the merge and delete process.

- ***Identify duplicate records using Data Entry Workflow (DEW)***: There is an existing feature in Data Entry Workflow which allow the user to identify the duplicate records while adding a new record in the application.

  If the *Duplicate check* is enabled for a step, then application will check the duplicate records while adding a record.



If application identifies a duplicate record in the F&SCM, then application will prompt the *Duplicate record found* page that will allow the user to merge and delete the duplicate records. Please click here to revisit the merge and delete process.

Note: Data entry workflow version 10.0.41.16 must be installed on F&SCM instance to use the duplicate cleansing feature in Data entry workflow.

- ***Identify duplicate records using Fuzzy Matching in Data Entry Workflow (DEW)***: There is an existing feature in data entry workflow that will allow the user to configure a step to check the data entered in the workflow instance using the Fuzzy Matching.

On the Fuzzy matching step, if application identifies a duplicate record in the F&SCM, then application will prompt the duplicate record in the grid and will allow the user to merge and delete the duplicate records.

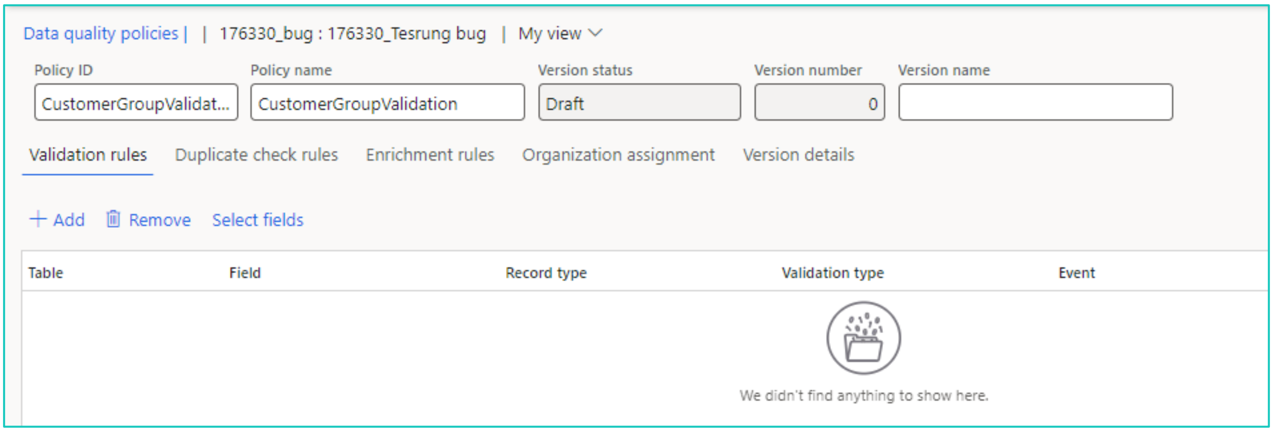
Please click here to revisit the merge and delete process.

Note: Data entry workflow version 10.0.41.16 must be installed on F&SCM instance to use the duplicate cleansing feature in Data entry workflow.

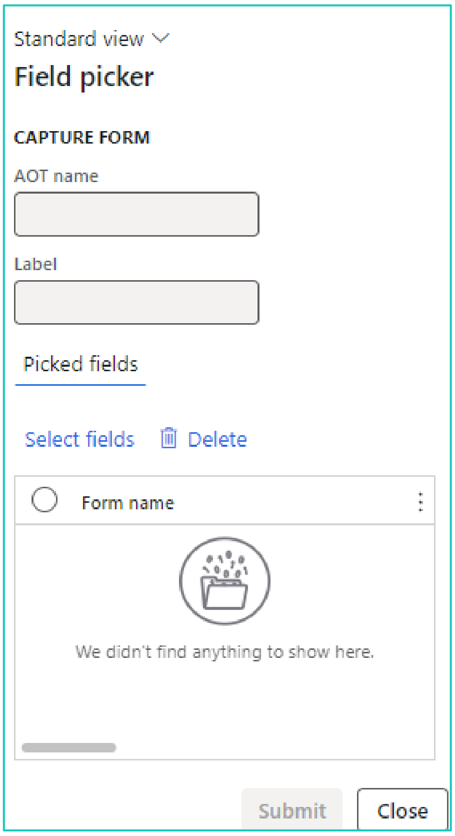
2.4.2 Field picker for Data quality policy

This enhancement will allow the user to use field picker to select the fields from a form on which the validation or enhancement rule is needed to be added.

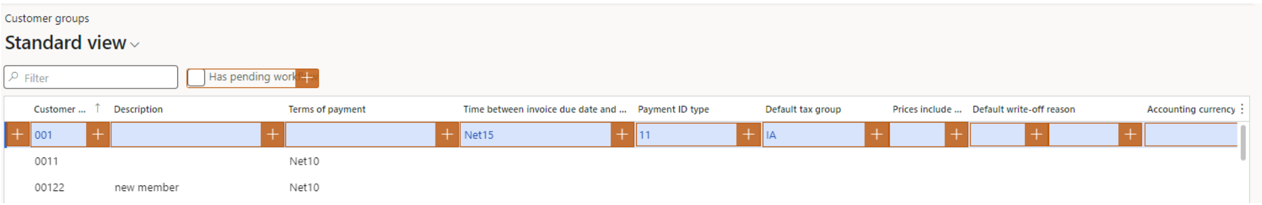
A new button, named Select fields, has been added on the Validation rules tab of the Data quality policy page.



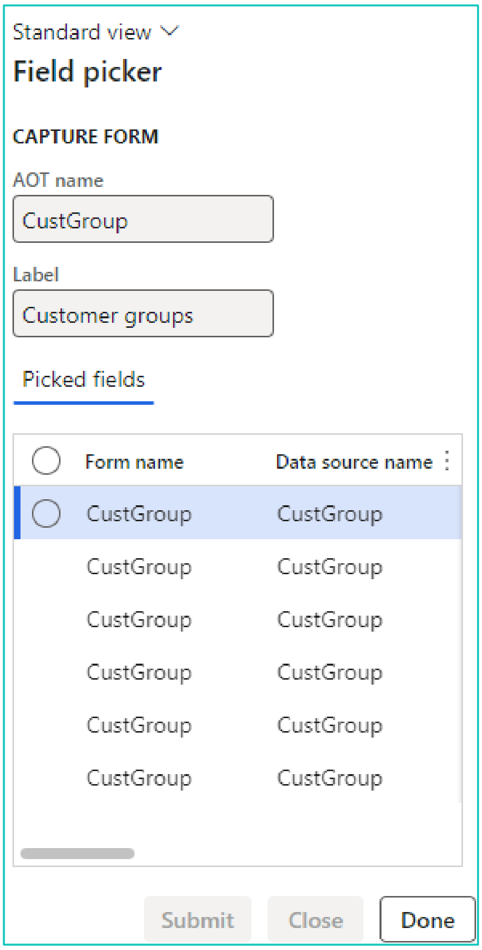
On clicking *Select fields* button, application will prompt the select field pop-up:



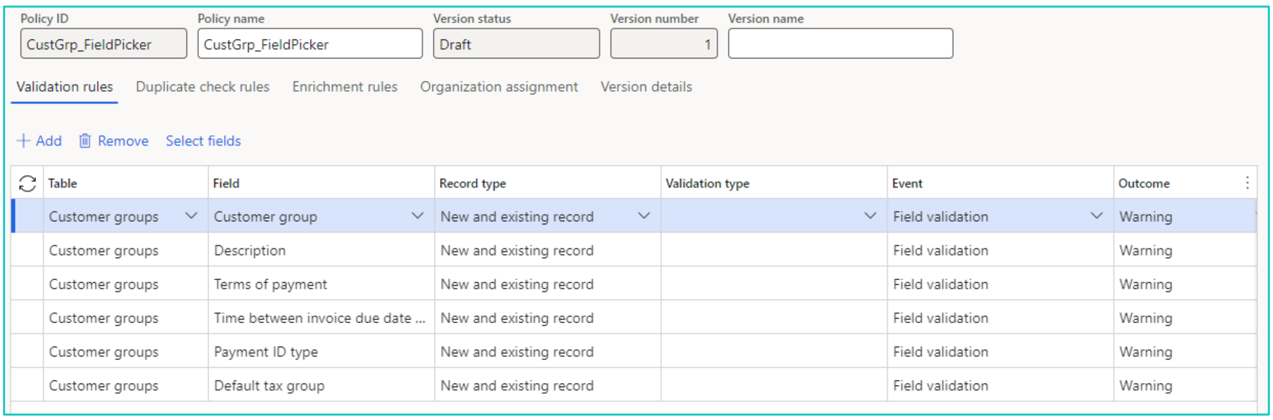
Once the pop-up prompts, user can navigate to the form that has the field that are needed to be validated and click on Select fields button on the pop-up.



Application will allow the user to select the fields using the Add (+) icon. The fields selected on the form will be populated in the *Field picker* pop-up.



User can click on Done button, followed by Submit, and application will navigate the user back to the data quality policy page and the selected field will be populated in the grid on the validation rules tab.



On this page, user will now need to specify the validation type and other validation details for each line item.

If user tries to activate a policy without specifying the complete validation details, then application will prompt an error message, and the policy will not be activated.

Filed picker feature will also be available for *Enhancement rules* tab and just like *Validation rule*, user will be able to select the fields for enhancement rules as well.

Note: User must use the field picker to create the validation rules and enhancement rules for a single page only.

2.4.3 Validation rules execution based on Record Type

This enhancement will allow the user to specify the record type for which the validation rule must be triggered. There are following types for which the validation rule can be configured to be executed:

- New record
- Existing record
- New and existing record

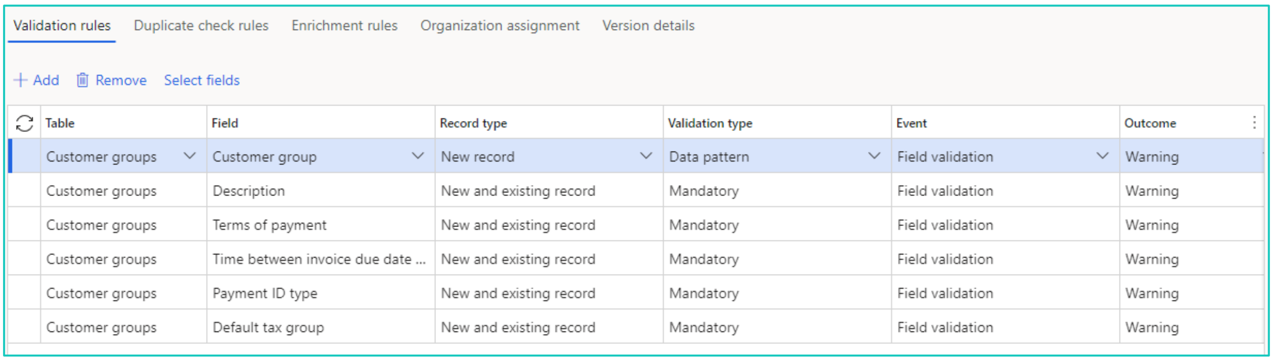


Table	Field	Record type	Validation type	Event	Outcome
Customer groups	Customer group	New record	Data pattern	Field validation	Warning
Customer groups	Description	New and existing record	Mandatory	Field validation	Warning
Customer groups	Terms of payment	New and existing record	Mandatory	Field validation	Warning
Customer groups	Time between invoice due date ...	New and existing record	Mandatory	Field validation	Warning
Customer groups	Payment ID type	New and existing record	Mandatory	Field validation	Warning
Customer groups	Default tax group	New and existing record	Mandatory	Field validation	Warning

If the record type is selected as '*New record*', then application will trigger the validation rules only while creating a new record. If the record type is selected as '*Existing record*', then the application will trigger the validation rule only if an existing record is being modified. Whereas, if the record type is selected as '*New and Existing record*', then the validation rule will be executed while creating a new record as well as while modifying as existing record.

2.4.4 Enrichment Rule Enhancement – Allow to enable or disable a field

This enhancement will allow the user to specify an enhancement rule to enable or disable a field based on the value of another field. This feature can be best used for *Source field modified* event.

A new Value Type, *Enable/Disable,* has been added for the enhancement rules. In the *Details* section, application allows the user to specify if the field must be enabled or disabled. User will also need to specify the form on which the rule must be applied.

Note:

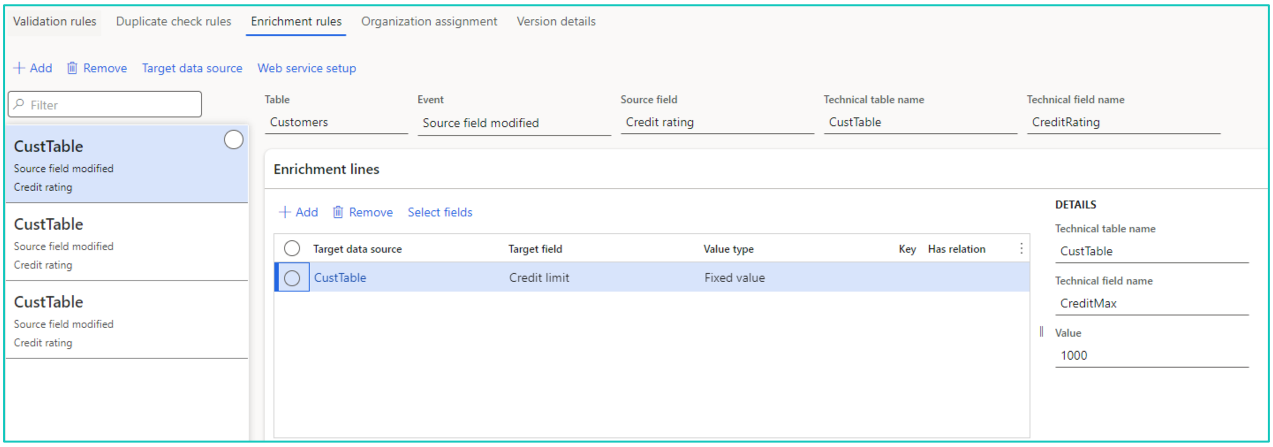
- While configuring an enhancement rule to disable a field, user must ensure that a counter rule must be configured to enable the field.
- In the current version, only one enrichment line can be added for a field in one enrichment rule. So, we will need to configure different enrichment rules for enabling and disabling the field.

The Conditions available for the Enhancement rule can also be used with the enrichment rules to achieve the desired result. Please refer to an example below:

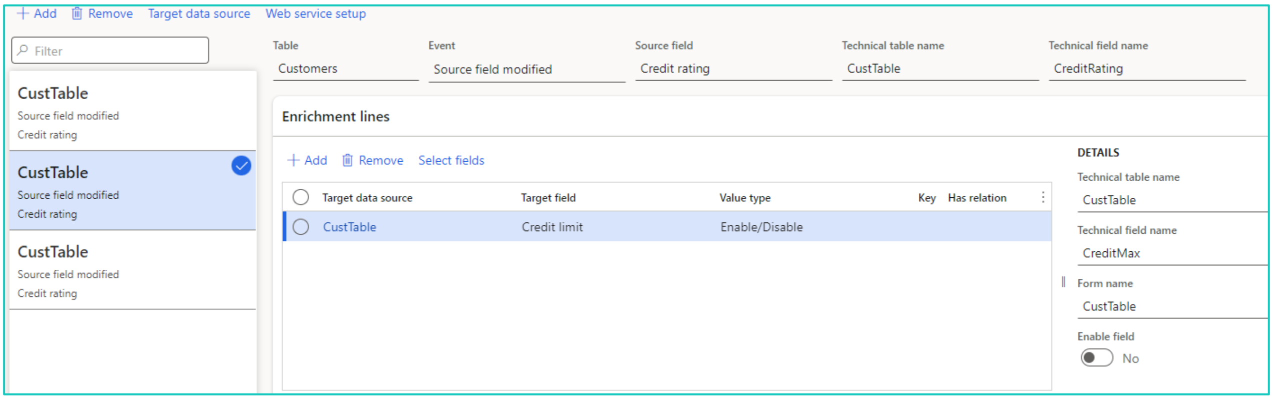
- If the Credit rating is selected as Poor for a customer, then the Credit limit must be auto populated as 1000, and the field must be disabled.
- If the Credit rating is selected anything other than Poor, then the Credit limit field must be enabled to be modified.

So, we need to configure the following enrichment rules to meet these requirements:

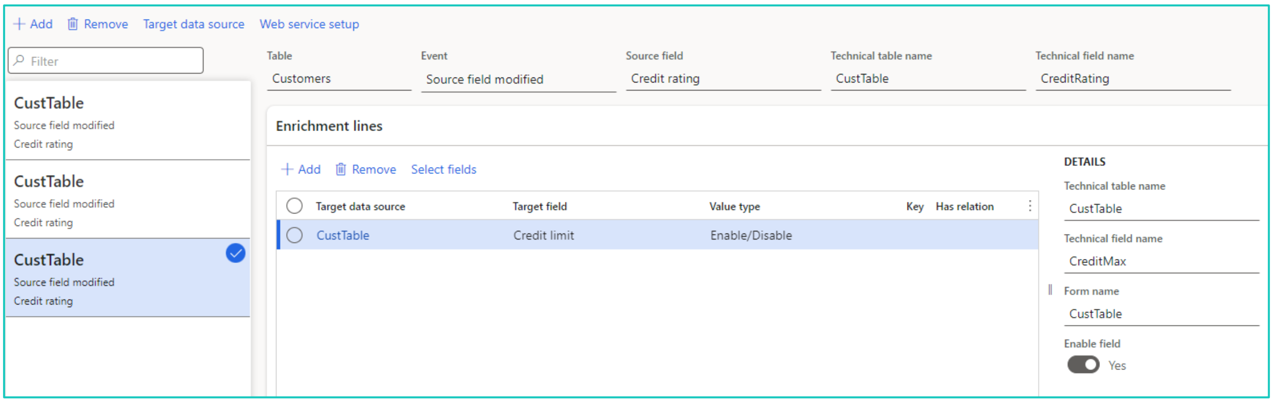
- First enrichment rule will be configured to populate the credit limit field must be populated as 1000. Note: A condition is also needed to be configured to ensure that the enrichment rule is applied only if the Credit Rating is selected as Poor.



- Second enrichment rule will be configured to Disable credit limit field. Note: A condition is also needed to be configured to ensure that the enrichment rule is applied only if the Credit Rating is selected as Poor.



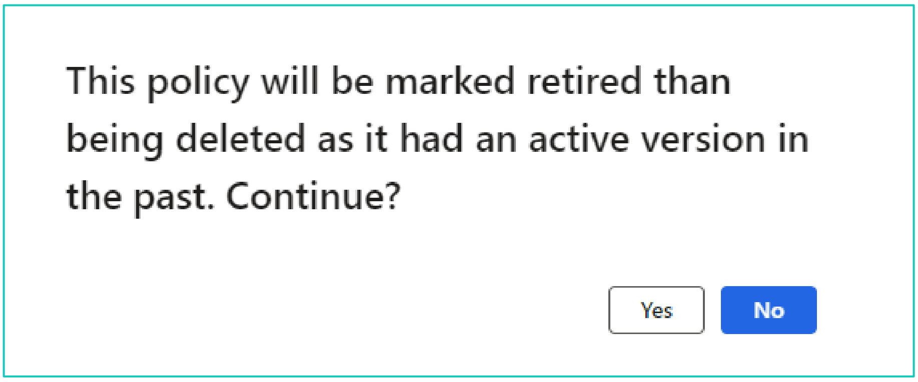
- Third enrichment rule will be configured to enable the credit limit field. A condition is also needed to be configured to ensure that the enrichment rule is applied only if the Credit Rating is not selected as Poor.



Note: *We will enhance the application further to ensure that a single enrichment rule can be used to configure multiple enrichment lines for a single field.*

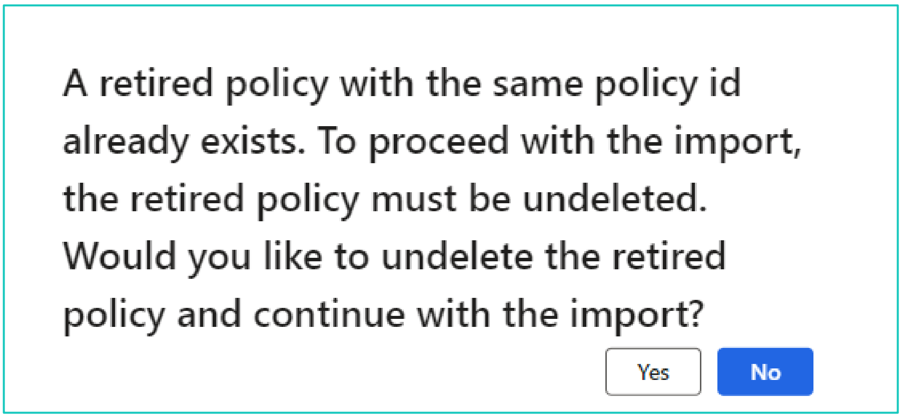
2.4.5 Enhancement related to Policy Deletion and Import

This enhancement will prompt an information message to the user while deleting a data quality policy if the data quality policy has been activated in past. This message will notify the user that the policy has been retired and not deleted.



However, if the policy being deleted has never been activated in past, then application won’t prompt this confirmation message as in this scenario the policy will be deleted, and not retired.

Additionally, while importing a data quality policy, if a policy with the same name exists in the retired policy section, the application will prompt the user with a confirmation message indicating that the retired policy will be restored.



If the user confirms, only then the application will import the policy, or else the policy will not be imported.

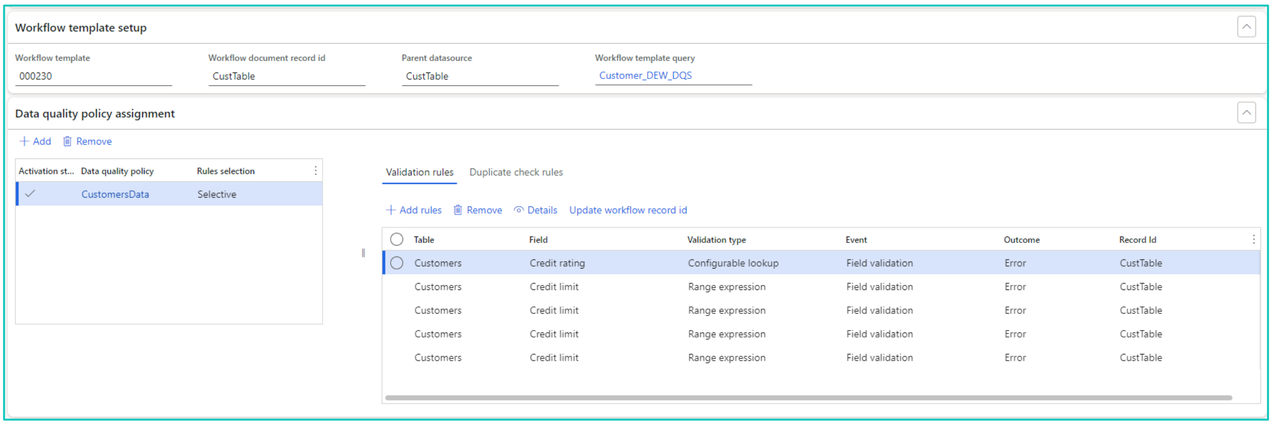
2.5 Release 10.0.40.11

2.5.1 DEW Integration for quality assessment results

This enhancement enables users to configure a data entry workflow template for modifying records that have failed data quality studio validation. ***Note: Data entry workflow version 10.0.40.15 must be installed to use this feature.***

The enhancement permits users to designate a data entry workflow template for a data quality assessment project, encompassing the following particulars:

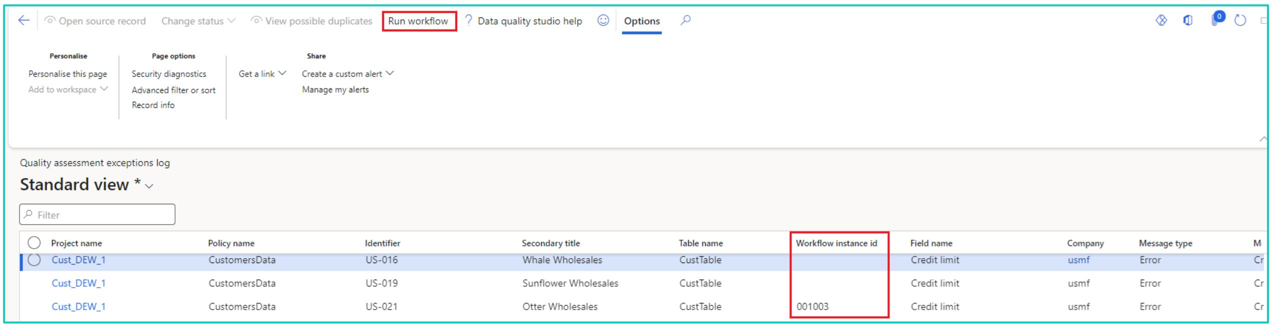
- Workflow template: Users must define the data entry workflow template to be utilized for creating a data entry workflow instance.
- Workflow document record ID: Users must identify the table name of the workflow document record.
- Parent datasource: This field will auto-populate based on the workflow document record id and is a non-editable field.
- Workflow template query: Users are required to formulate the query, ensuring it includes the fields validated by the data quality assessment project, especially those not contained within the parent data source. (Note: Query must be configured to always return unique records)



It is essential for users to verify that the fields validated through the data quality assessment project are included in the chosen data entry workflow templates; otherwise, the application will not permit saving the quality assessment project.

Upon completing the quality assessment project, users can navigate to the "*Quality Assessment Exception Logs*" page, select a record, and click the "*Run Workflow*" button to start a workflow instance for that record.

(Note: If a single record fails multiple validations, it will appear as multiple entries in the quality assessment exception log grid. Should the "*Run Workflow*" button be clicked for a record that already has an associated workflow instance, the application will not initiate a new instance. Instead, it will notify the user that an instance already exists for this record and will display the reference in the "Workflow Instance ID" column.)

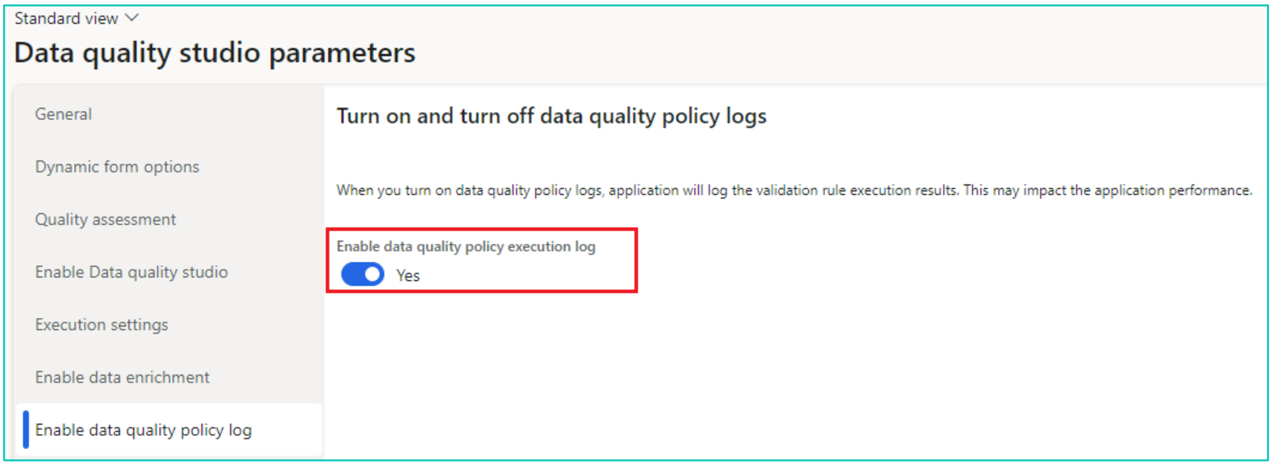


Note: Data entry workflow version 10.0.40.15 must be installed to use this feature.

2.5.2 Data quality studio – Execution Logs

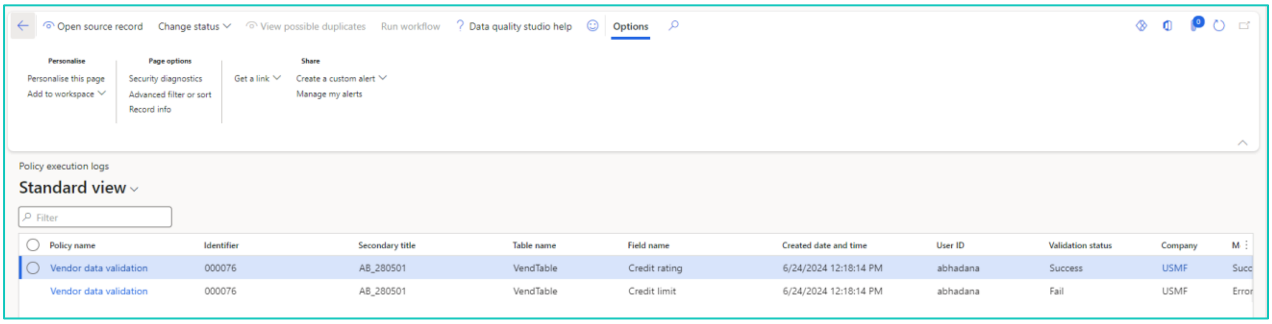
As per the current implementation of application, users can only access logs for quality assessment executions. The new feature enables users to also view the policy execution logs for forms. A new page called '*Policy execution logs*' has been introduced in the Inquire section, permitting users to inspect the validation execution logs for different data quality policies.

This feature needs to be enabled from the Data quality studio parameter page:



If the '*Enable data quality policy execution log*' is enabled, the application will capture the execution logs of validation rules. Conversely, if the '*Enable data quality policy execution log*' is disabled, the application will not capture these execution logs.

If the execution logs are enabled, then application will populate the capture logs on the *Policy execution logs* page.



Users can also download the execution logs in an Excel format.

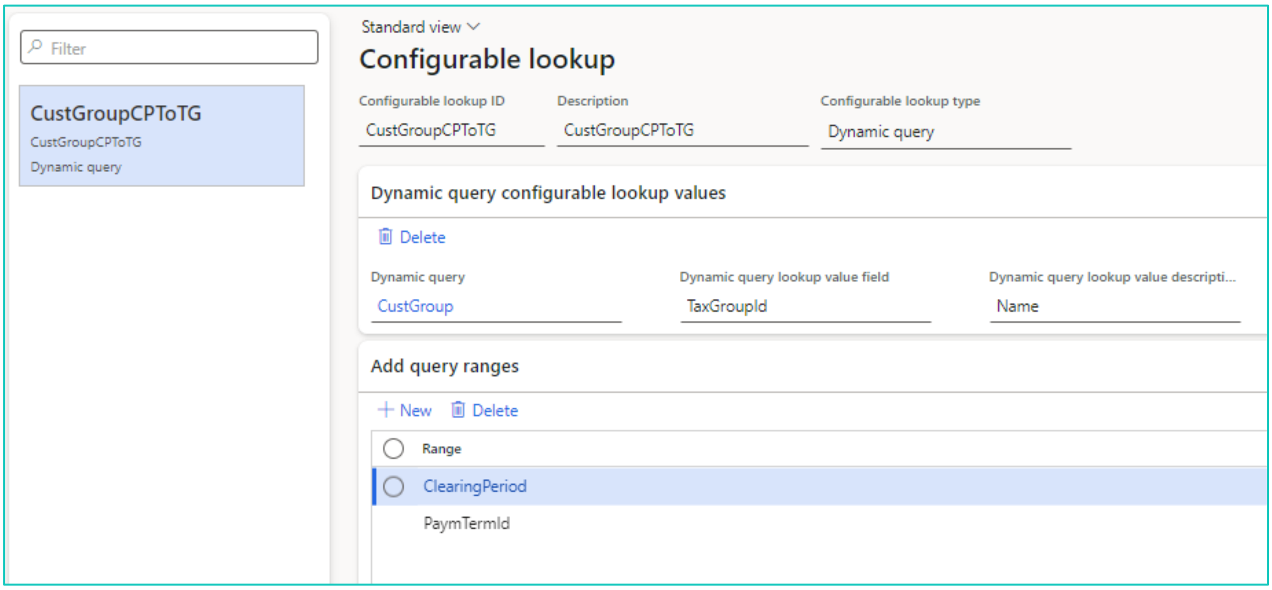
Furthermore, a batch job for cleaning up the execution logs can be set up. This batch job, called *'Clean-up Logs'*, is available in the Periodic Task section of the application.

2.6 Release 10.0.39.9

2.6.1 Configurable lookup dependent values

This enhancement will allow the user to configure configurable lookup using dynamic queries. This enhancement will allow the user to filter the target field drop-down values based on the value of the source field.

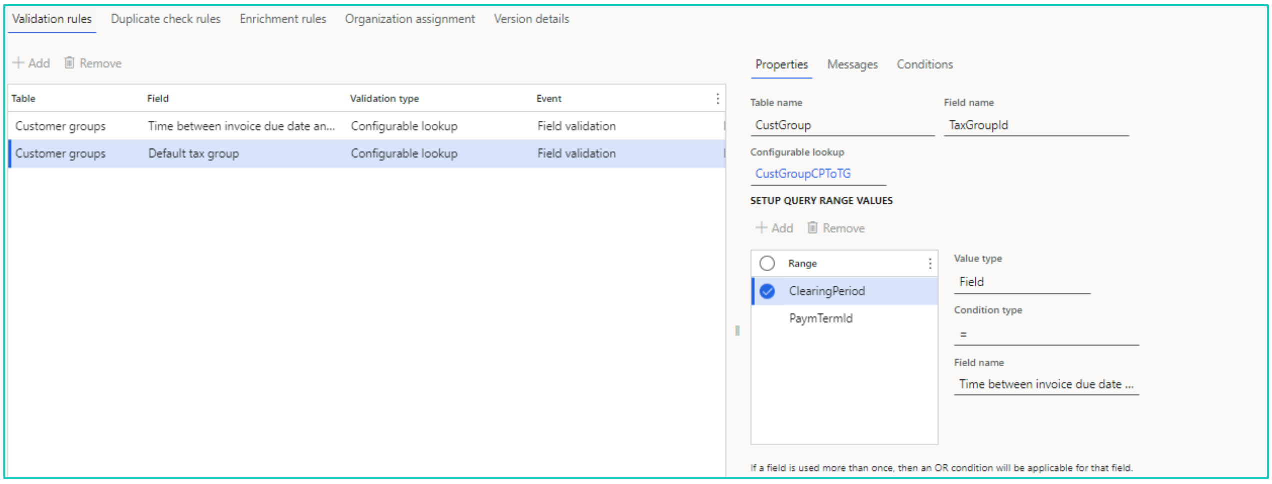
While configuring the configurable lookup application will allow the user to specify multiple query ranges which can be used to filter the target data values for the record. In the screenshot below, a configurable lookup has been configured using a dynamic query and for this lookup filter, the fields added in the *Add query ranges* section can be used to filter the values.



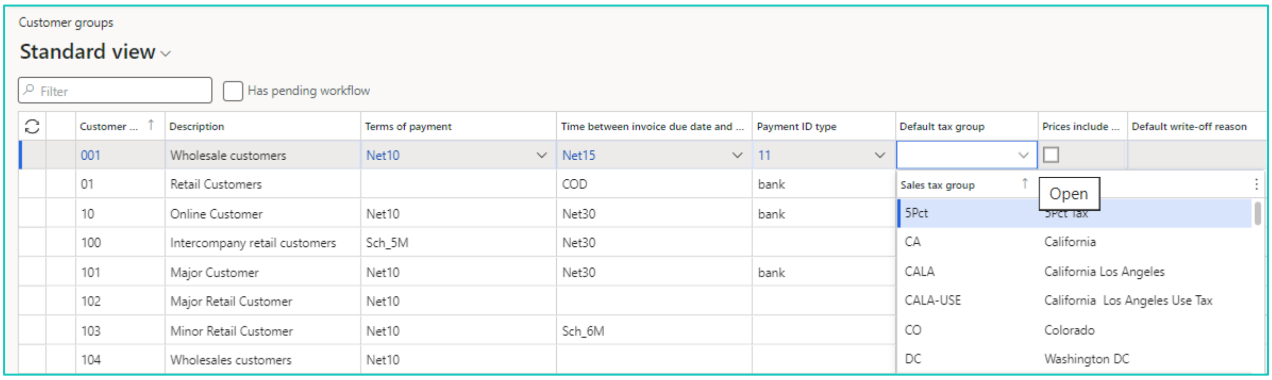
Once the configurable lookup has been specified, the configurable lookup can be used on the *Data quality policy* page’s *Validation rule* fast-tab.

As per the screenshot below, we have configured the configurable lookup for *Default tax group* field using the dynamic query and the configurable lookup value will be populated based on the values specified for the following fields on the form:

- Clearing period
- Payment term id



In the screenshot below, application is populating the values for *Default tax group* based on the values selected for Terms of payment and Time between invoice due date and payment date (Clearing Period).

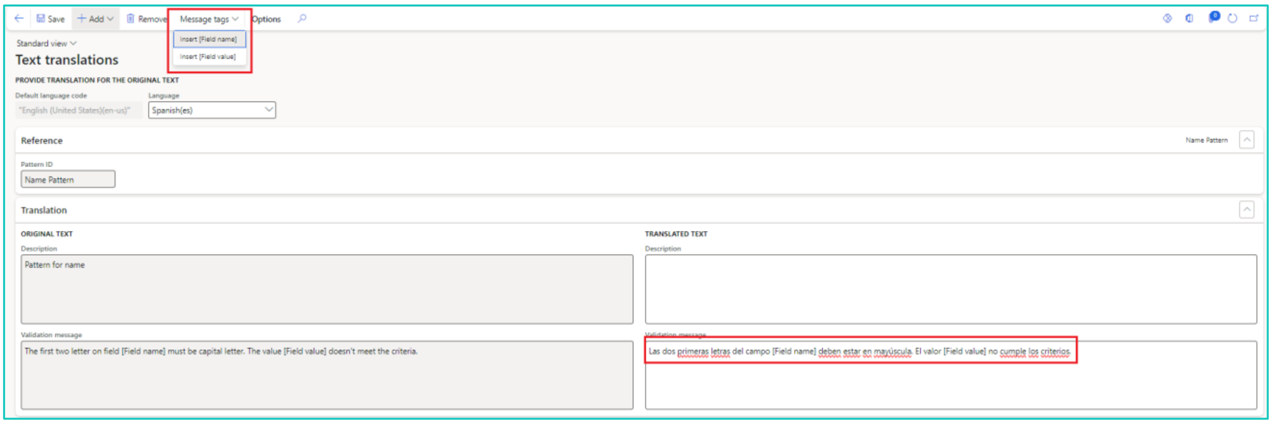


2.6.2 Placeholder in messages and translations

On the data pattern page, two new tags [Field name] and [Field value], has been introduced. These tags can be used while specifying the error/warning message in the application.

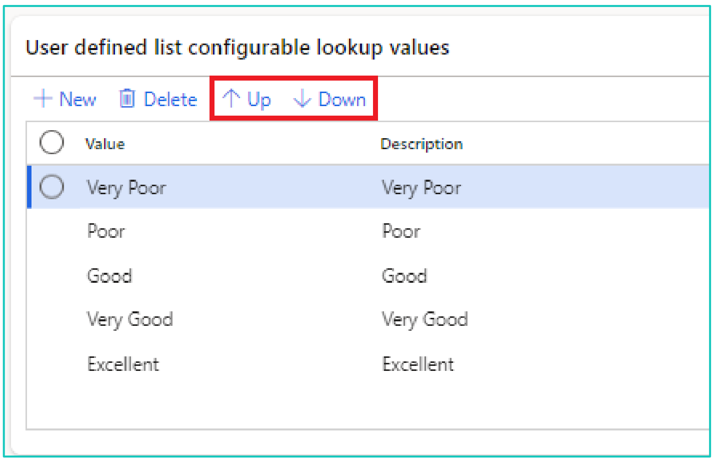
While populating the error/warning message for a field, the application will replace the [Field name] with the name of field which is being validated and [Field value] tag will be replaced with the value populated for that field.

Same is applicable for translations as well. The two tags [Field Name] and [Field value] will be available on translation page as well to allow the user to specify the translation for the error/warning message.



2.6.3 Configurable lookup sequence setup

This enhancement will allow the user to specify the sequence for the configurable lookup (of *User defined list*) values by using the Up and Down buttons introduced in the application.



The configurable lookup values will appear in the same sequence in the application as specified on the configurable lookup page.

Note: If data entry workflow is also installed on the instance of F&SCM along with data quality studio, then this enhancement will also be applicable to the data entry workflow instance. While adding a new record using data entry workflow template, if there is any field in the data entry workflow template for which the configurable lookup field of User defined list type is configured, then the drop-down values for that field will appear in the same sequence as configured on the Configurable lookup page.

2.6.4 Action/enhancement rule validation for number sequence

This enhancement will ensure that the number sequence selected while specifying the action rule or data enhancement rule for a field, application must validate that the scope of the number sequence must be Company. If the scope of the sequence is other than company, then:

- Application must not allow the user to save the action/data enhancement rule
- If the data enhancement rule is already saved in the application, then application must not allow the user to activate the data quality policy.

2.6.5 Address and Contact related table records handling on the results page

On the Data quality assessment exception log page of the application, if there is any log related to address and contact details and if user wants to navigate to the source record, then application prompts an error message and doesn't navigate the user to the source record.

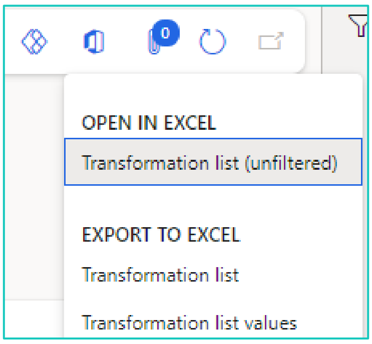
This enhancement will allow the user to navigate to the source record, to which the selected (address or contact) error log belongs to, so that we can navigate to the source record to correct the contact/address.

2.6.6 Open in Excel capability for Transformation list values

On the Transformation list page, there are two tables:

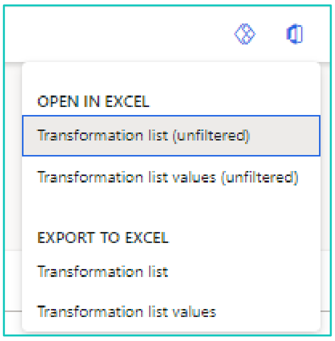
- Transformation List
- Transformation List Value

If we click on the Open in Microsoft Office option on the top-right corner of the screen, only the following option appears:



So, the Export to Excel option is available for both the tables: Transformation list and Transformation list values. Whereas the Open in Excel is available only for the Transformation list, and not available for Transformation list values.

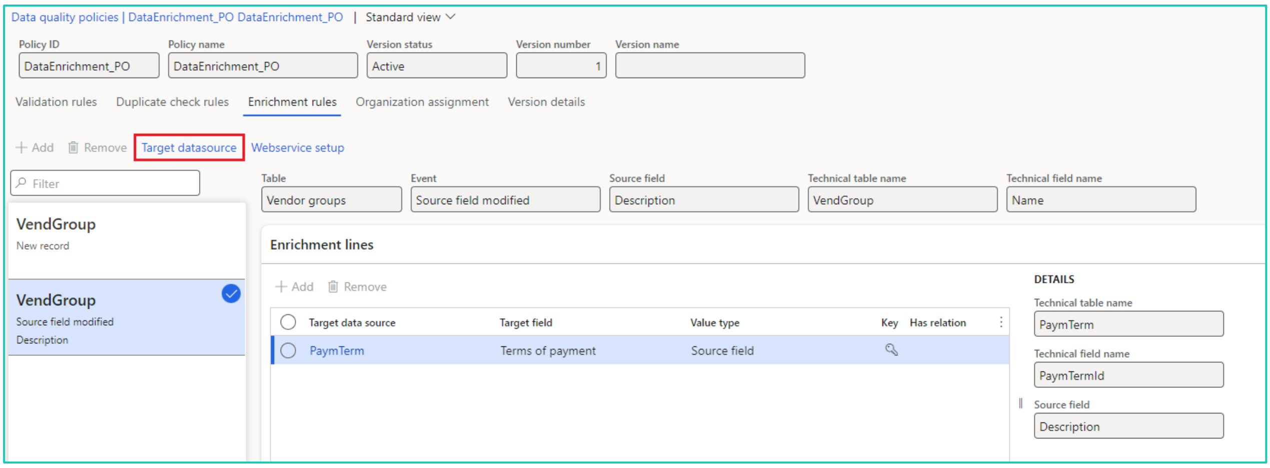
This enhancement will allow the user to open the transformation list values in the excel sheet and update the data using the excel sheet itself.



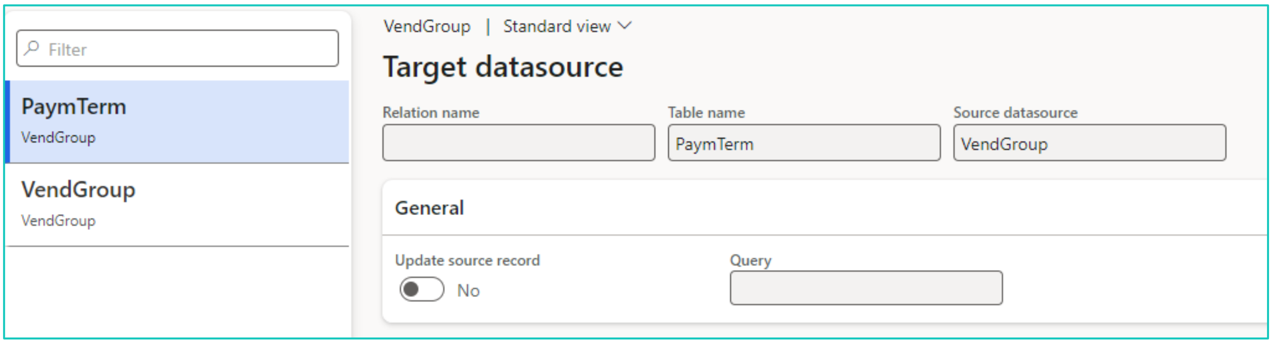
2.7 Release 10.0.37.8

2.7.1 Data enrichment on related tables

Previously, With the Action rules, user can set field values in a current record only. This enhancement will allow the user to insert new or update existing records in a target data source that are related to the current record. This enhancement will allow the user to specify the target table and specify the relationship between the current record and record that need data enrichment.



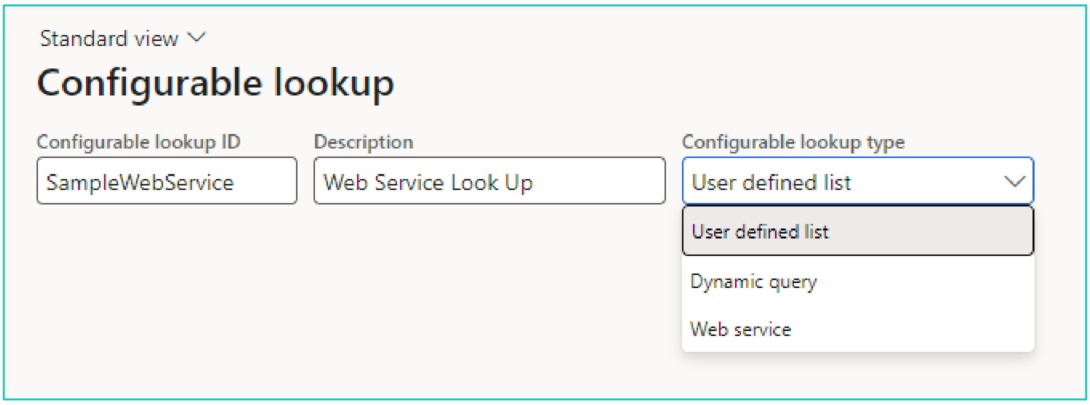
In the screenshot specified above, we need to click on the highlighted button titled *Target datasource* and need to specify the target data source. In the screenshot below, we have specified a target data source, i.e. PaymTerm, for which the source data source is VendGroup.



In the first screenshot, we have specified that a new value must be added in the *Term of payment* column of the PaymTerm table, based on the value specified in the Description field of the source data source, VendGroup.

2.7.2 Web services support for configurable lookups

This enhancement will allow the user to setup a configurable lookup using web services in the application. On the *Configuration lookup* page of the DQS application, the application will prompt a new configuration lookup type named: Web Service.

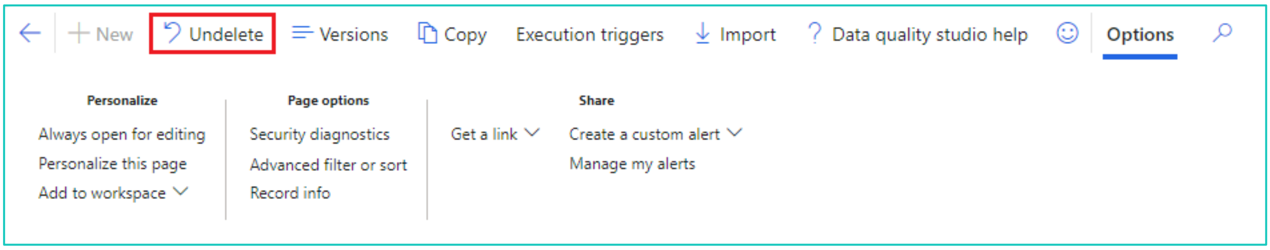


For the web service lookup, user will need to specify the following details:

- Web Service
- Web service lookup value field
- Web service lookup description field
- Minimum input length

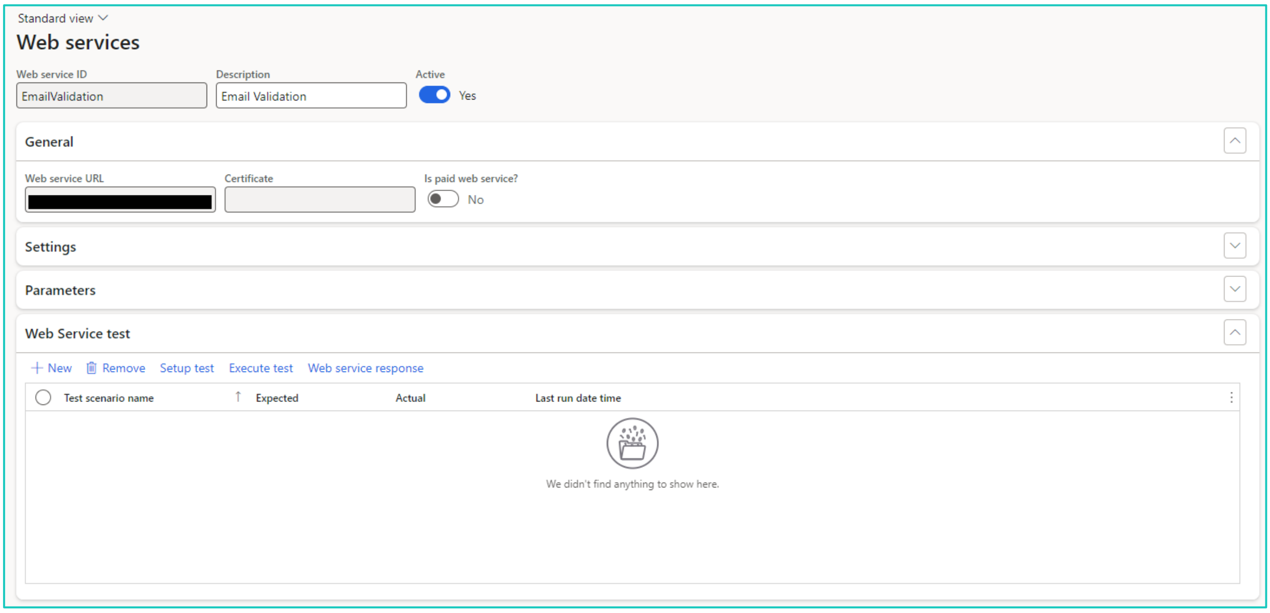
2.7.3 Restore retired data policy

This enhancement will allow the user to un-delete a retired data policy. A new button has been added to the Retired Data Policy page titled as *Undelete*.



2.7.4 Test feature for Web Service

This enhancement will allow the user to test a web service. A new fast-tab has been added on the *Web Service* page which will allow the user to test the web service. This functionality will be available for data quality administrator role. The feature will allow the user to test the connection to the webservice and test the request and response for the web service.



2.8 Release 10.0.36.7

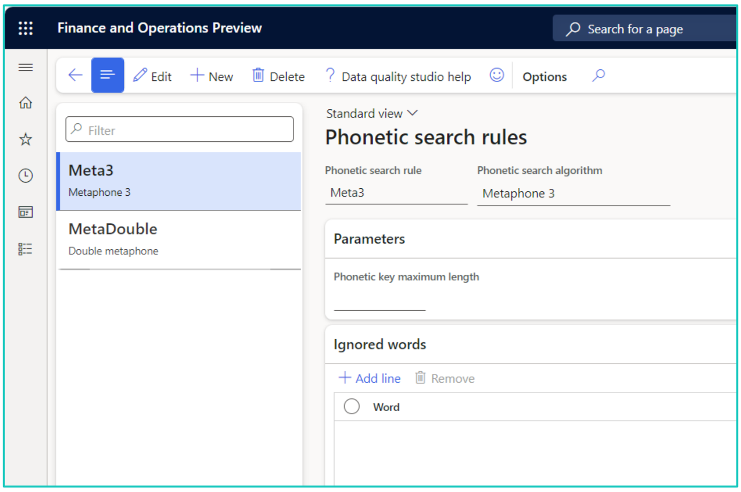
2.8.1 Quality assessment – user security

In this current release, we enhanced the quality assessment feature, introducing security on what users would be able to see what data in the results overview. Using the security role Data quality officer, a person would be able to see the quality assessment results for only the projects they are setup as a data owner. You can setup an overall data owner for a project, but also specific persons responsible for each legal entity individually.

2.8.2 Phonetic searches in duplicate checks

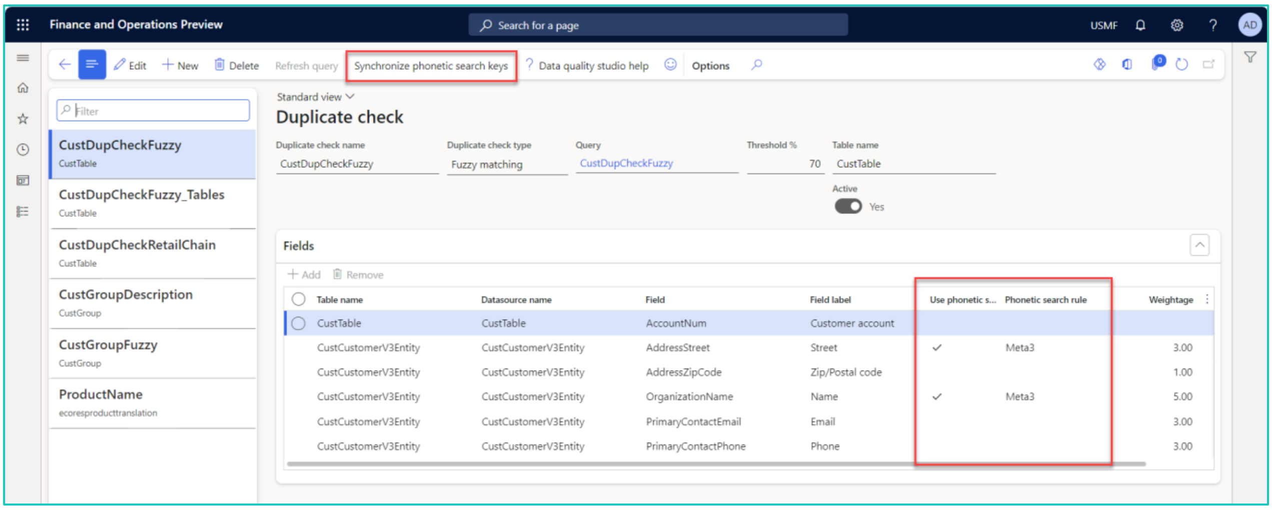
Previously, we released duplicate checks based on fuzzy logic. In this release, we also added phonetic search algorithms supporting duplicate checks on names that sounds similar. E.g. Jon and John sound the same and would be used in the fuzzy logic if setup in your environment.

In the setup section, you can setup **Phonetic search rules**. The algorithm supported is Metaphone with two different versions. You can find more information on the internet: https://en.wikipedia.org/wiki/Metaphone



For advanced settings, you can also setup a maximum length or ignore some words to be indexed. We suggest you start with the algorithm setting only and only finetune based on experiences.

When setting up the **Duplicate checks**, you can enable the phonetic search for each field individually, like shown on the screenshot.



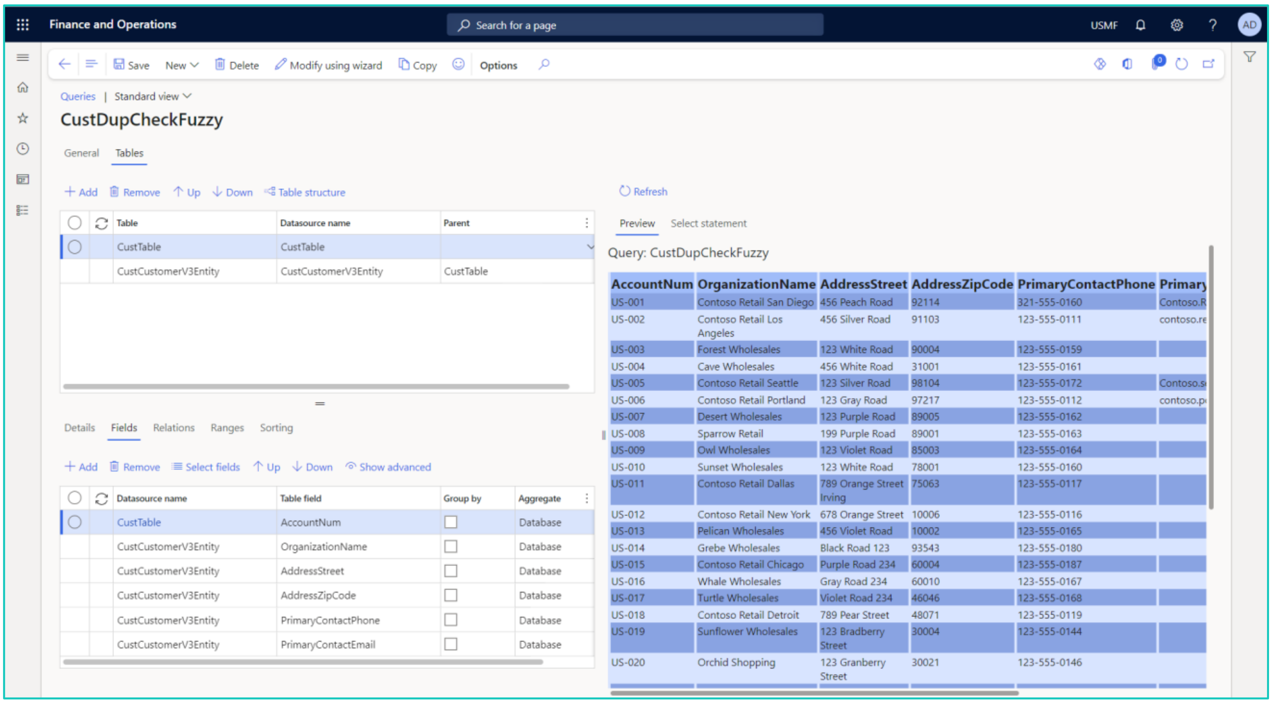
When you enabled the phonetic search option for one or more fields, ensure that you will **Synchronize phonetic search keys** which will index existing data for the columns. It is required to schedule a recurring batch to keep the phonetic search keys up to date based on new data entry. You can create one single batch for all duplicate checks by leaving the **Duplicate check name** parameter empty. You can schedule the batch job to run several times an hour. When not enabling the option **Force to recreate**, the job is executing quickly.

2.9 Release 10.0.34.6

2.9.1 Fuzzy logic duplicate checks

One of the main features added in this release is the option to setup and use duplicate checks with fuzzy logic. With help of this feature, a duplicate check can be set up where values from multiple fields will be compared and a duplicate score will be calculated. The check can be performed manually on a form or during the quality assessment.

The setup will start with a dynamic query where information can be sourced from any table and field. There is a need to start with the main table that would be identified as a duplicate. In the example of customer, vendor and released products, the details to check for duplicates are stored in several tables. In these cases, it would be recommended to use available data entities as related table to have all data flattened and easy to understand column names. In case you would need to check both the email and phone number, this would be two records in the contact details table whereas the data entity has them available already as individual fields.

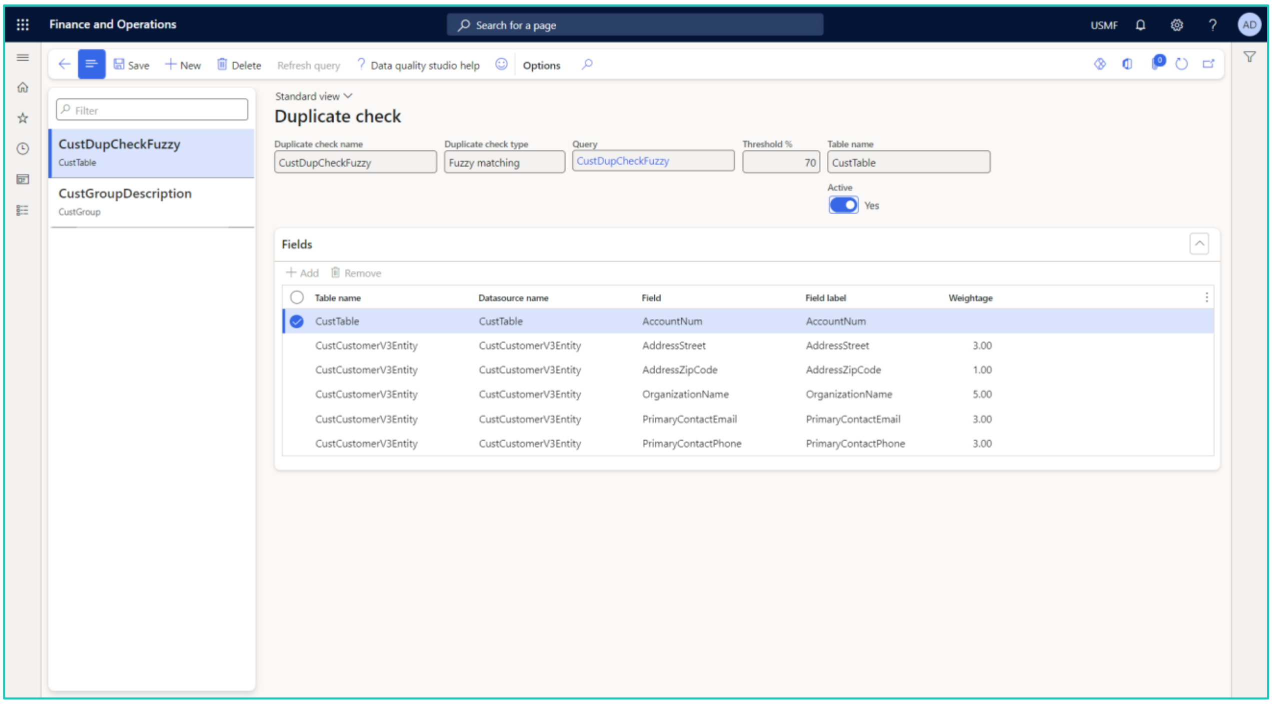


When the query is defined, you can go to the Duplicate checks form where you now can choose between two types of duplicate checks.

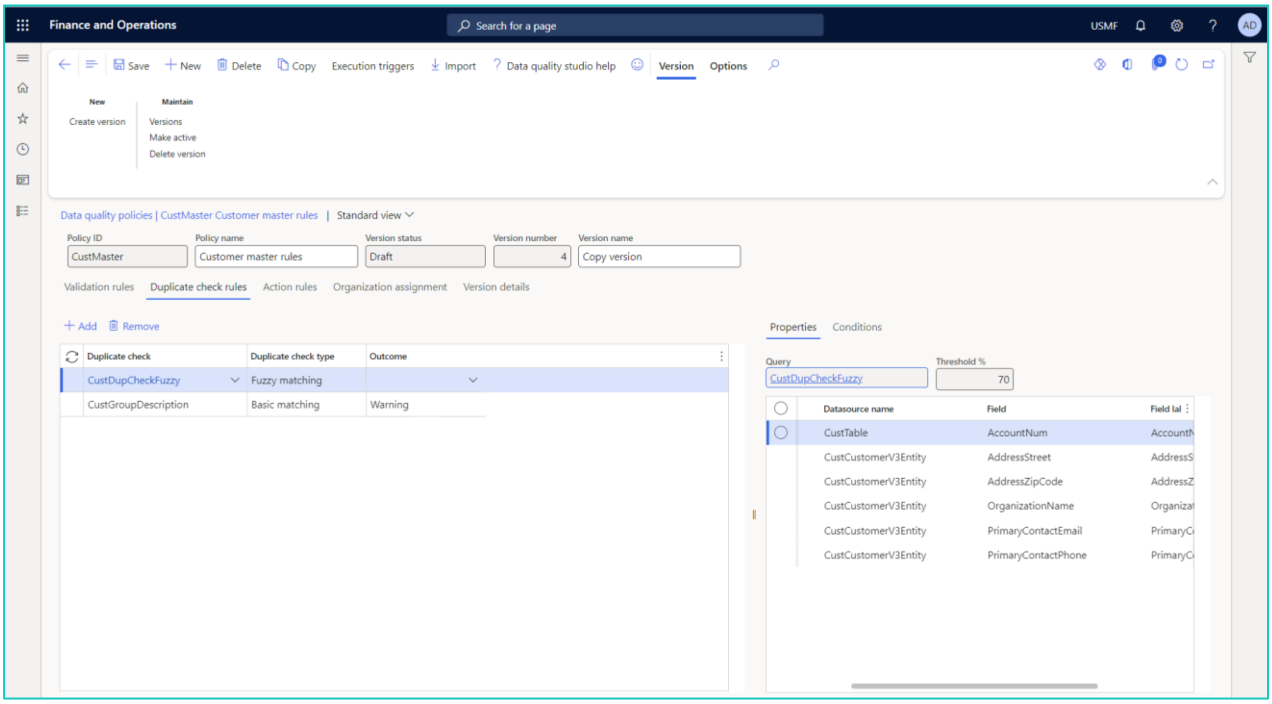
The type 'Basic matching' was the check that was already available in the solution and will try to find the same combination of fields with literal values. E.g. a customer group with the same Description or Product names per language.

The type 'Fuzzy matching' gives you the option to specify the query as created above, together with a threshold and a weightage per field. There is no need to consider a total of 100% for the weightage, you can specify a number with or without decimals. In the example below, the organization name is considered to be 5 times more important than the zip code.

The threshold will be used to determine if a possible duplicate will be reported to the user or not. In case e.g. the zip code would be the only duplicate, then the calculated score will be 6,67%. This record can be skipped to be reported as duplicate.



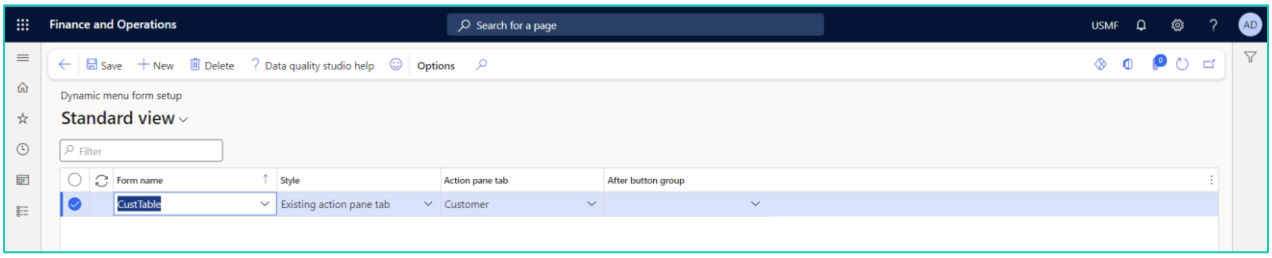
Once the Duplicate check definition is completed, you can set up the data quality policy like the basic matching.



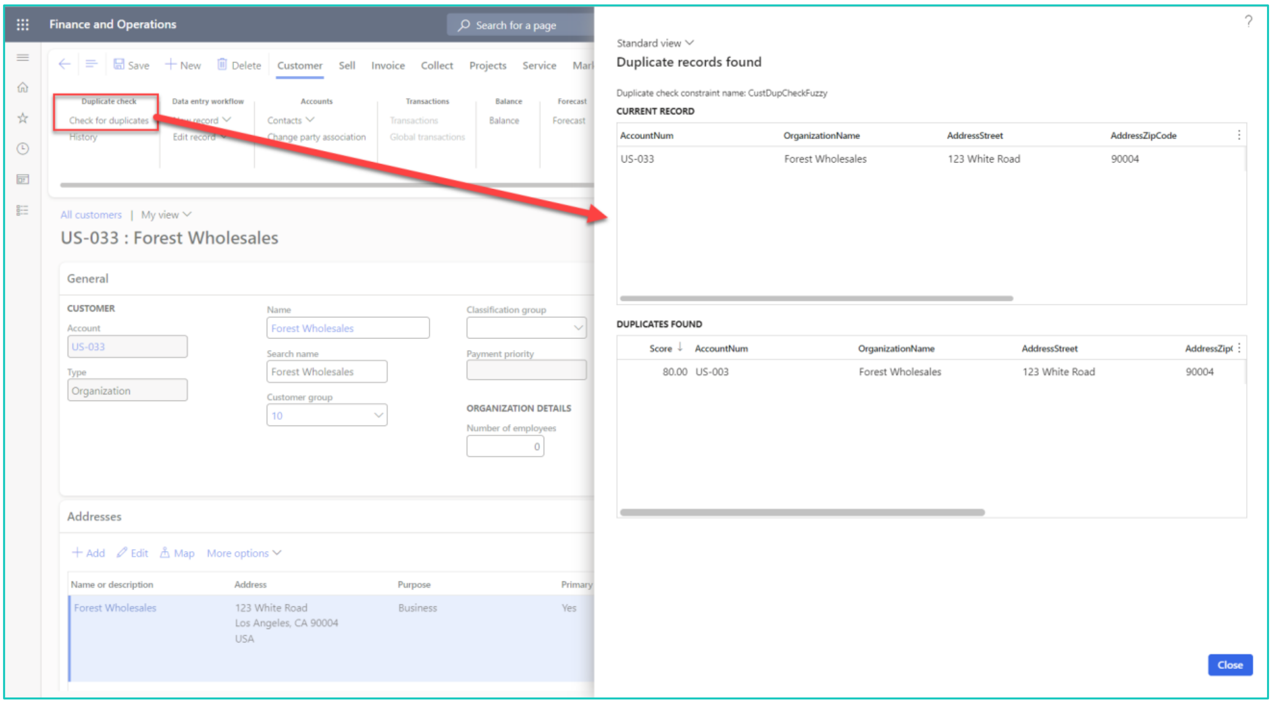
Note that the Outcome is not set as the fuzzy matching is not run automatically when entering data. As data for e.g. a customer or product is stored in multiple tables, the application is not aware when a user completed the data entry.

The duplicate check can be set with conditions to separate between type of records. E.g. you can have another duplicate check for customer master for individual companies and a retail chain. If you have e.g. fast-food chains as customers, the name might get a lower weightage.

On a form Dynamic menu form setup, you can manage on what form, support for calling the duplicate check will be visible and on what position the action should be added.

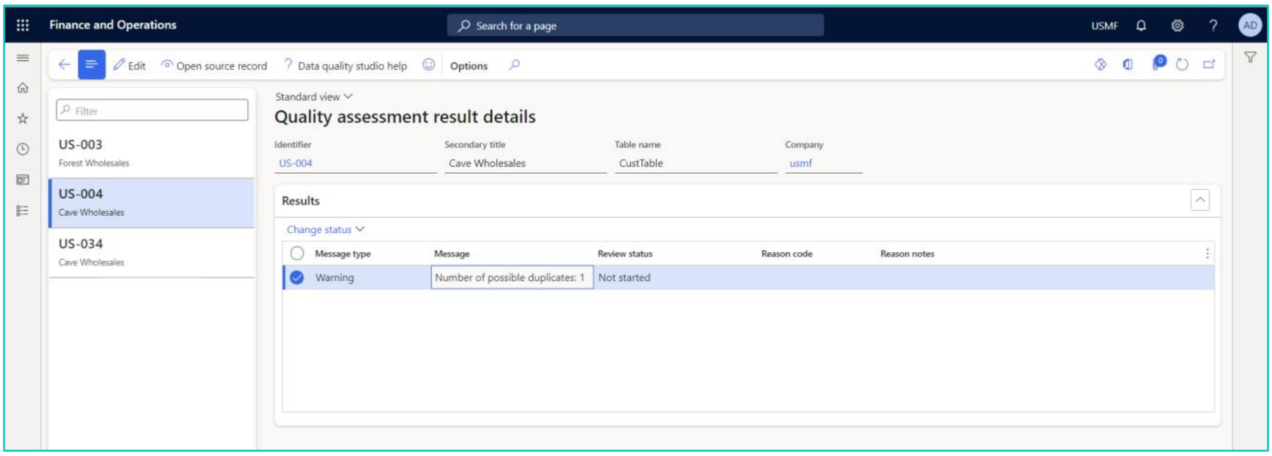


Having the Duplicate check menu items, you can check for possible duplicates.



In this version, there is no automatic deletion or merge functionality. Based on the judgement of the user, a duplicate record should be mitigated manually. This could be e.g. deleting the newly created record manually.

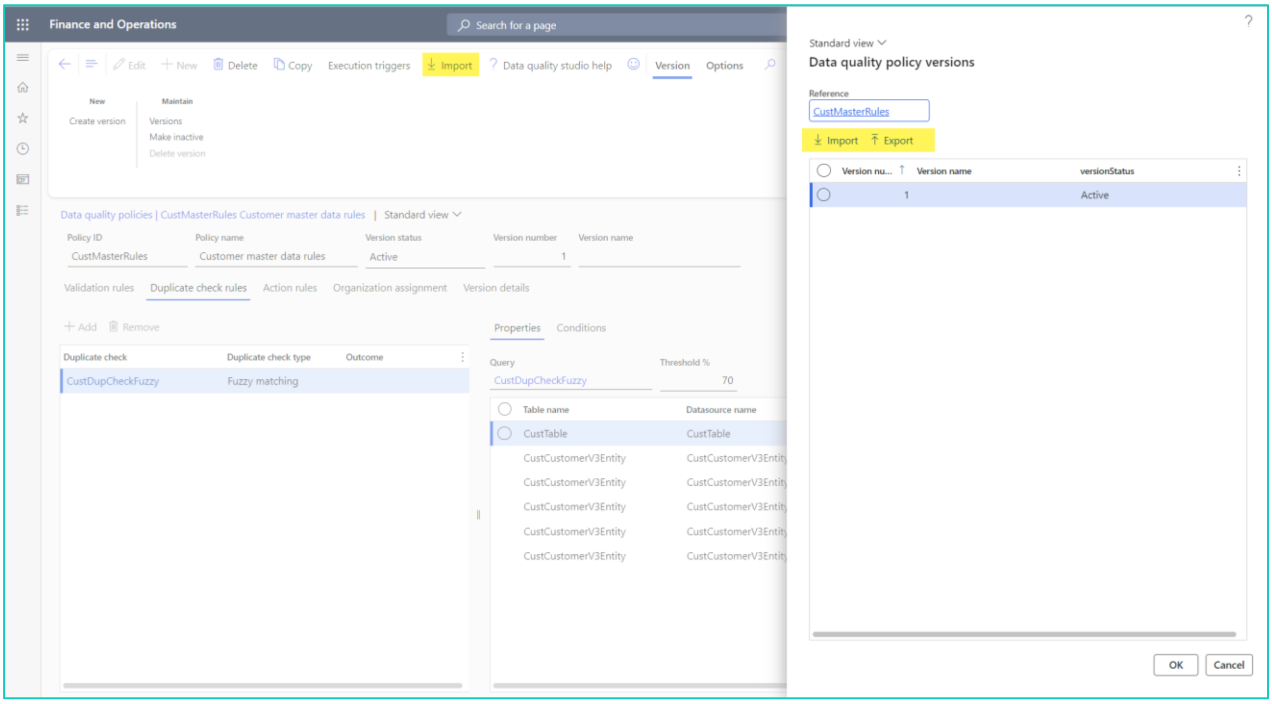
In case a user did not check for duplicates manually, the Quality assessment integration will give warnings about possible duplicates.



When a duplicate check warning is provided, the user can open the source record and check the details of the suggested duplicates.

2.9.2 Data quality policy export and import

A feature was added for exporting and importing data quality policy versions. With help of this feature, you can easily move a version with all rules, settings and conditions from one environment to another.



The export is made available on the Versions page. Import can be done on this same dialog or on the Data Quality Policies page. In case there is no policy with the same name, a policy and first version will be created. In case versions already exists, the import will add a new version.

2.9.3 Visibility enhancement

The active version is now added as column on the Data quality policies list page. This provides better insight if policies are active and with what specific version.

2.9.4 Added Online Help shortcut to Data Quality Studio forms

Like for some of our other products, we have now added a quick way to reach our online documentation. On all forms from the data quality studio solution you will now find a button **? Data quality studio help**.

2.10 Release 10.0.31.4

2.10.1 Certificate renewal

The security certificate, that expires every 3 years, ensures that our customers have valid Staedean software installed and not an unlicensed copy. This digital check is executed during installations and upon installing the license files, ensures that they have legitimate software installed. The previous security certificates for Staedean solutions would expire on June 9, 2023.

This release (and releases beyond) contains the new certificate and a new feature within the Solution Management Workspace. After installing the update, the security certificate renewal can be completed in 5 simple steps.

Step 1: Set the environment in maintenance mode

Step 2: Install the update and navigate to the Solution Management Workspace

Step 3: Click the 'Retrieve available licenses' in the action pane

Step 4: Validate the licenses for correctness and completeness and click import

Step 5: Disable the maintenance mode for this environment

Click here for more information on the Solution Management Workspace.

2.10.2 Support for multiple languages

At Staedean, we are constantly working to upgrade our solutions and encourage customers to participate by sharing feedback. We had earlier launched an in-app feedback option in our D365 solutions, where our customers can share their feedback and requests while using our solutions. We did receive multiple requests for translations in other (European) languages. We picked the most requested languages and added it to our roadmap.

As of the current release, we do support Data Quality Studio in 10 different languages out of the box. The user interface is, as part of the strategy, available in the next languages: English (US), German, French, Spanish, Portuguese, Dutch, Italian, Norwegian, Swedish, Danish.

Staedean is using the Microsoft Dynamics 365 Translation Service for automated translations of user interface elements. In our solutions we use standard labels and new solution specific labels. The standard labels are already provided with translations done by Microsoft. The solution specific labels are now also available to users in more languages.

As we used automated translations and reused existing labels, it might be the case that some translations are wrongly translated. With a single translation unit, the AI powered translation service is not aware if it should be translated as noun or verb. Some words do have multiple meanings, like "application". It could be related to recruitment or a software solution. If you come across such issue, please use the in-app feedback or create a support case, so we can improve the translations for future releases.

If you are in the need for other languages or your business requires a different term, you can extend the label files with a small development effort.

If you have customizations on the translations in your current environment, check if this is done in a separate extension model and correct extension naming convention. If e.g. the name of the Staedean label file in the English language is *TILabel.en-US.label.txt*, the new translation in German provided by Staedean will get the file name *TILabel.de.label.txt*. Ensure in your customization will then have a naming convention including the keyword *extension*. A German extension label file has then the name *TILabel_extension.de.label.txt*. The extension labels will have priority above the standard provided labels. You can also choose to remove your labels and uptake our new standard translations.

The next label file(s) are part of this release:

DQS.en-us.label.txt
DQS.da.label.txt
DQS.de.label.txt
DQS.es.label.txt
DQS.fr.label.txt
DQS.it.label.txt
DQS.nb-NO.label.txt
DQS.nl.label.txt
DQS.pt-PT.label.txt
DQS.sv.label.txt

Excluded from our translations:

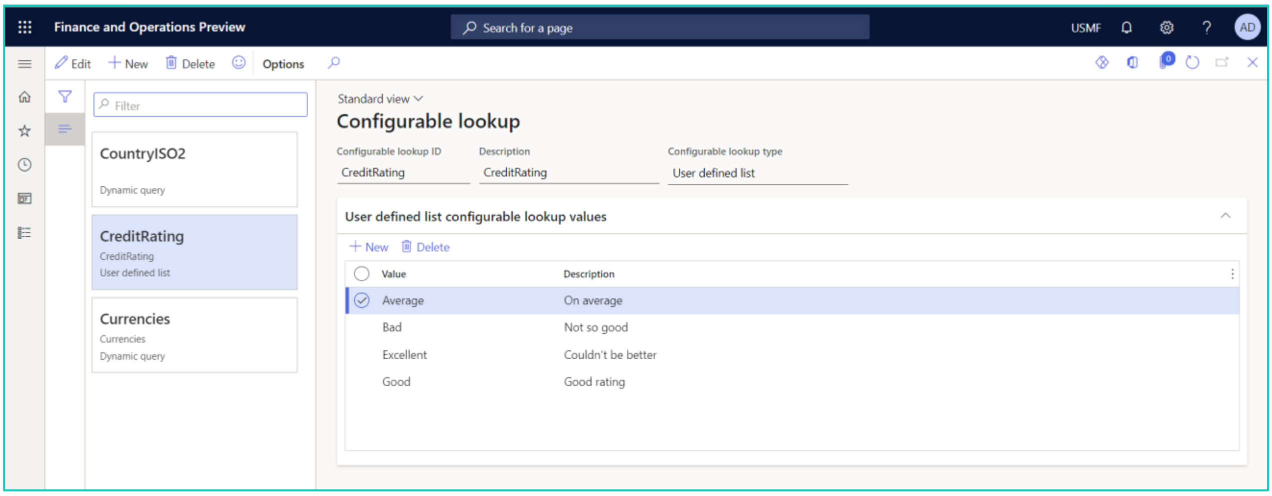
- Staedean will continue to offer its services to customers and partners in English.
- Our website, product documentation, release notes, and any other updates will be available in English only.

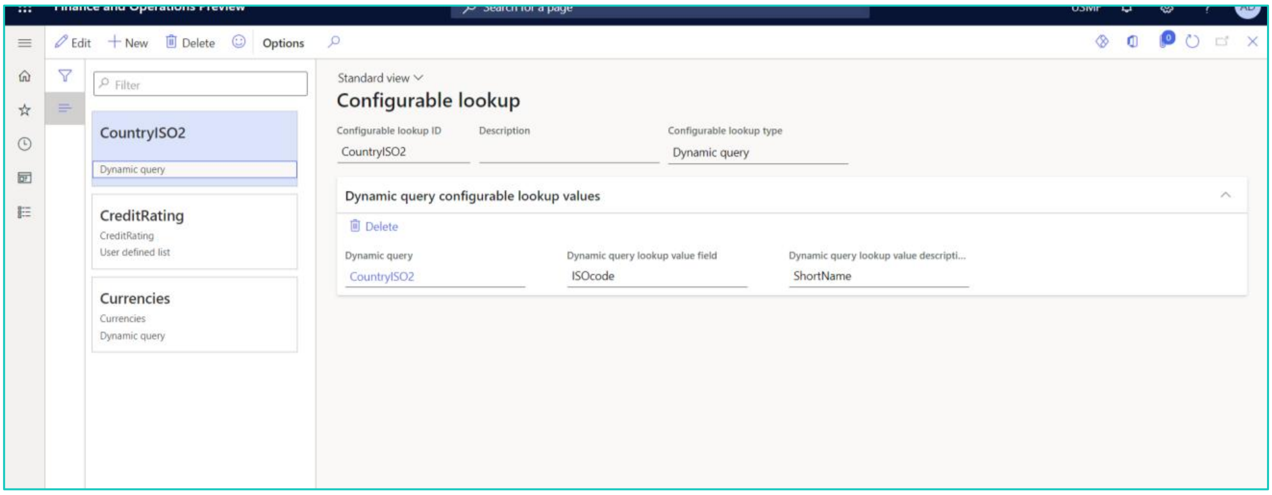
2.11 Release 10.0.31.4

2.11.1 Configurable lookups

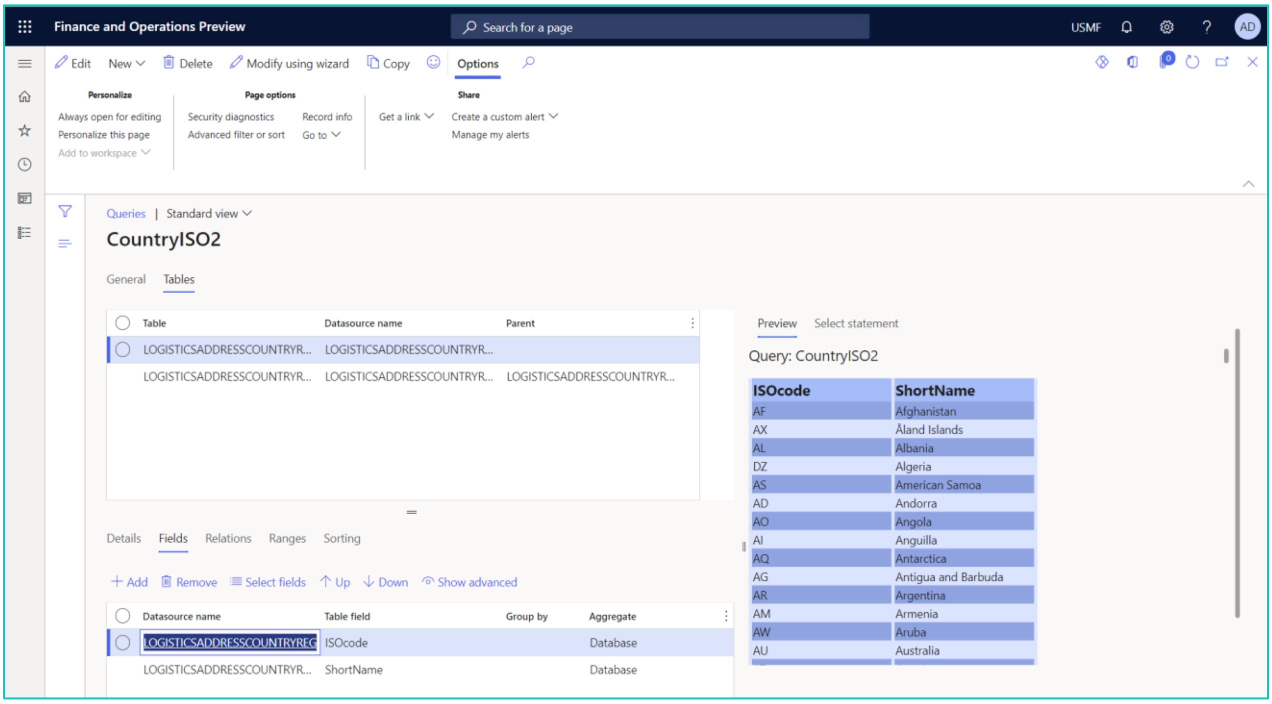
For several use cases, we added a new feature where you can configure custom lookups for supporting the user choosing allowed values. This can be added to field without and with a standard lookup. As an example, you can provide limitations for the credit rating field, but you can also limit the number of options in case of existing reference tables. Suppose you need to constrain the options for method of payments to be used for customers and vendors.

The configurable lookups consist of a generic setting which can be reused on multiple data quality validation rules. You can setup two different lookup types. One type supports a custom pre-defined list where a second option is to source available options from the database with help of the Dynamic Query Framework.

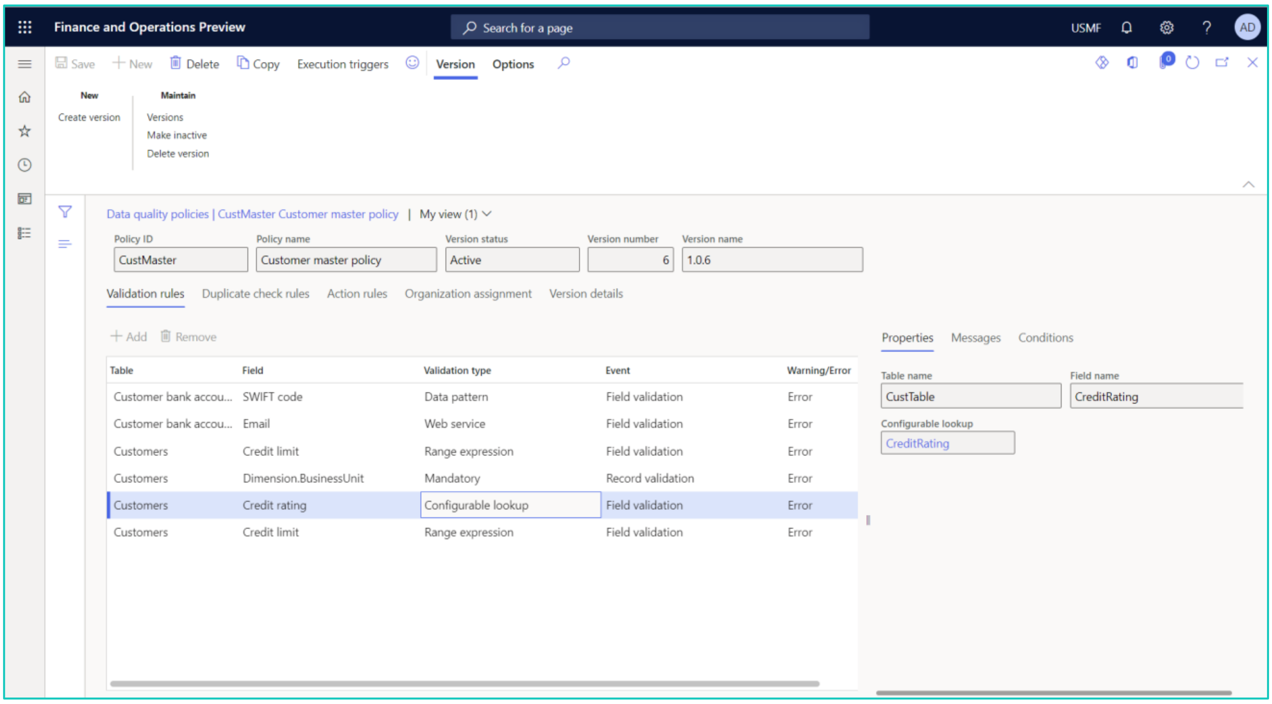




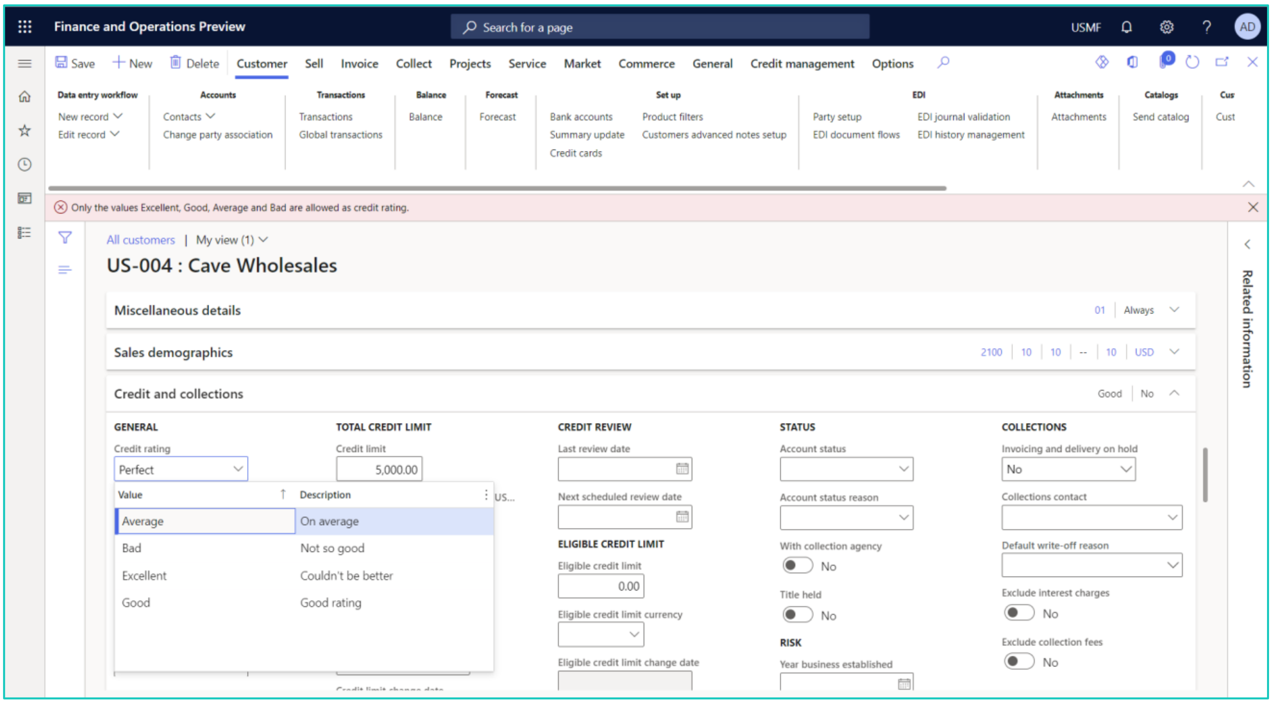
The selected query for this configurable lookup is defined as per next screenshot.



On the validation rules, you can then setup the configurable lookup with a new validation type: *Configurable lookup*.



With the field **Warning/Error**, you can specify if the values from the lookup are mandatory and raise an error or if the user can also provide own values. In that case you can select to give a warning or skip the validation with the value *No validation*. This last-mentioned option can only be used for the configurable lookup validation type. Like any other rule, you can add business messages or conditions if required.



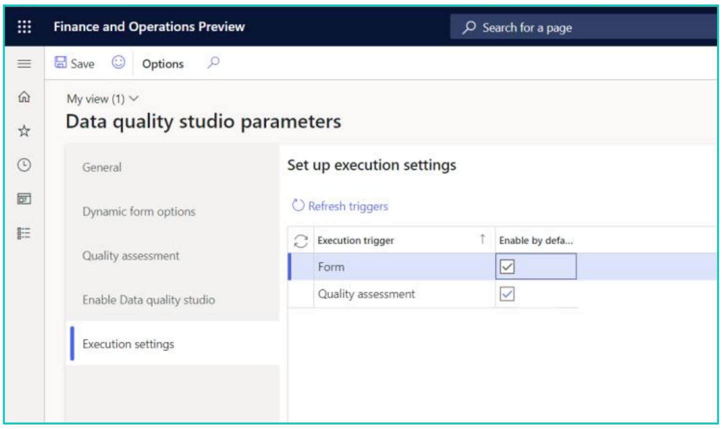
There is a known issue where the lookup values are not being filtered as expected if you start typing a value in the field and then the lookup will appear automatically. A workaround for this is first opening the lookup and then start typing where the list with values will then be filtered. We have a backlog item to solve the current inconveniency.

The configurable lookups is also supported in Data Entry Workflow version 10.0.31.8 or higher.

2.11.2 Execution settings

For supporting flexibility when data quality rules are triggered, there is an option to specify for each policy if the rules will be triggered on forms, for quality assessment or other (future) purposes.

When you have installed the latest version, ensure you will first navigate to the Data quality studio parameters and click on **Refresh triggers** on the Execute settings tab page. The values in the field **Enable by default** will be used when creating new data quality policies.

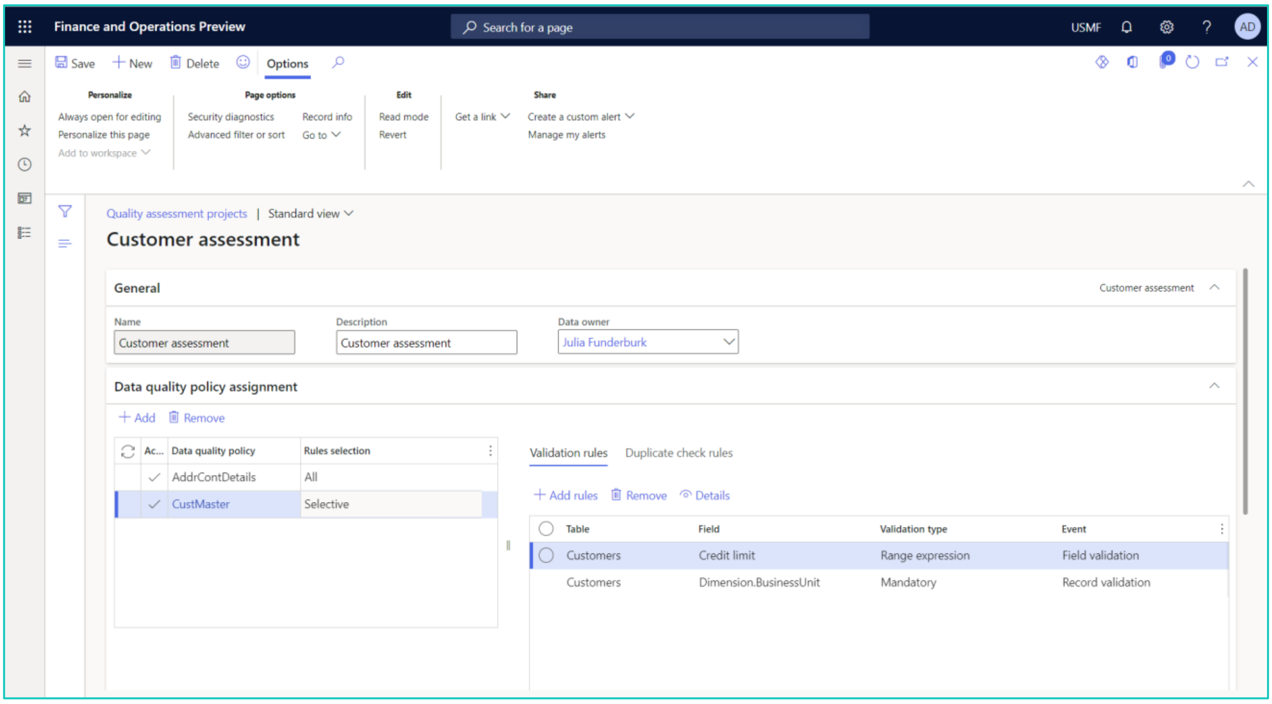


Per policy, you can set when to execute the rules. This would give your organization the option to decide to pro-actively check for valid data or use a process to clean up data periodically. You can access the settings for execution triggers on the action menu bar of the **Data quality policies** page.

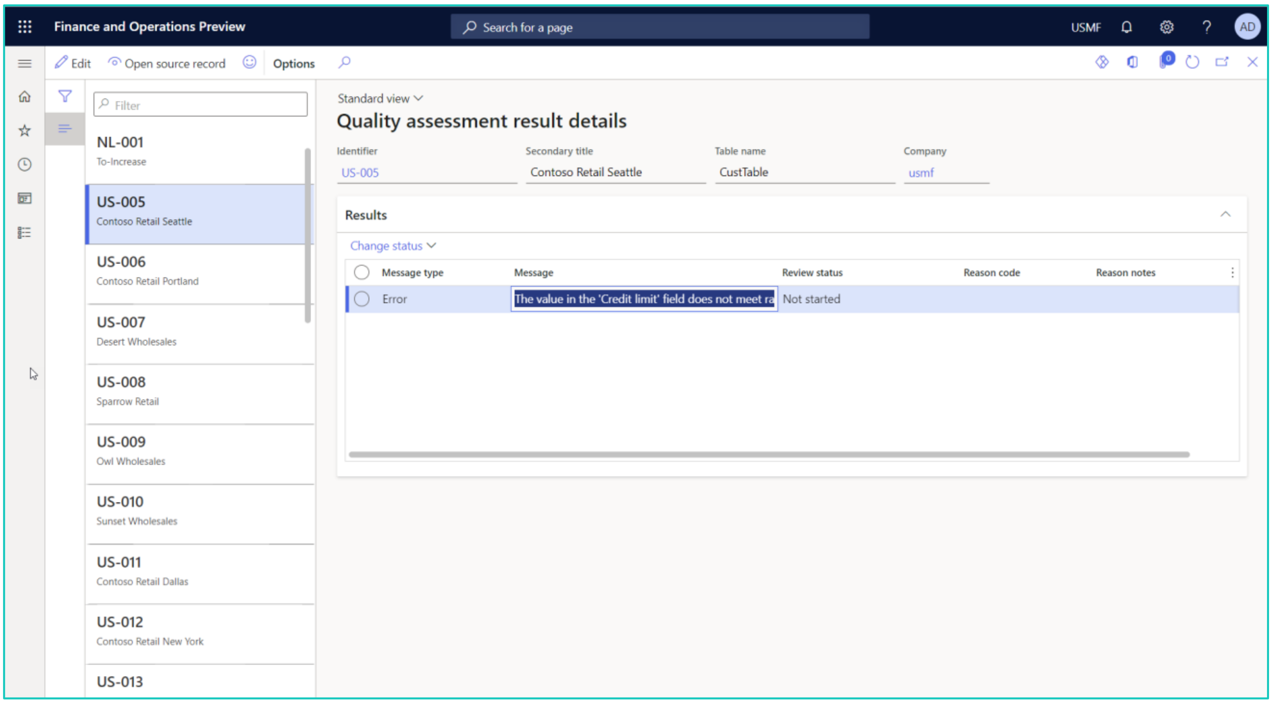
2.11.3 Quality assessment (preview)

A first version of quality assessment is added to this release. With the quality assessment, you can execute validation rules for existing records. It would give you the flexibility to check for valid data at any point of time. You can run the quality assessment when there was a change implemented for data quality studio, when you imported data, when the form triggers are not enabled or periodically to check for the level of quality data.

From the Data Quality Studio, you can open the Quality assessment projects page where you can provide information about the data owner(s) and which rules are to be executed. For different master data entities, you can create multiple projects.



From Data Quality Studio > Periodic tasks, you can start the batch job to collect data for the assessment results.



You can review the outcome and correct the data by opening the form for the source record. With help of the review status you can track the progress and indicate to skip correction this occurrence.

We have some known issues and we are working on some additional features to complete the quality assessment functionality.

- Selection of individual rules are currently not working. It will only run across all rules for a given policy.
- Data restriction. To prevent visibility into private or sensitive data, security will be implemented where e.g. data owners for products will not see details for customer results.
- When opening source records, the application tries to find the default menu item for the given table. Some tables, like addresses and contact details don't have a specific menu item and form. We will work on some specific handling to open e.g. the global address book or customer page.

2.11.4 Tutorial class for action rule

Previously, two tutorial classes were provided with the solution providing examples for custom validations with help of x++ coding. In this release a custom class is added which can take a number from a number sequence and add a checksum digit. The class can be adjusted to the needs of your organization.

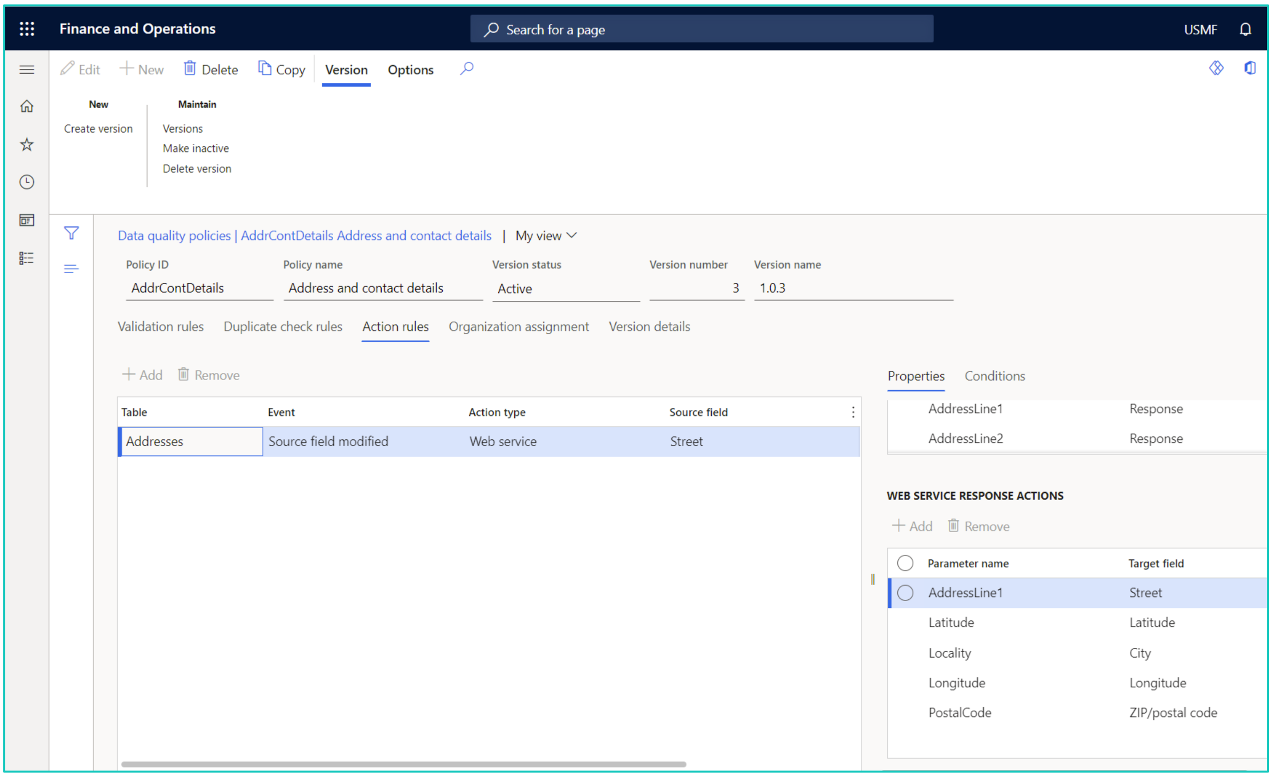
Tutorials are intended as code examples and are not actively supported by Staedean.

2.12 10.28.3

2.12.1 Web service improvement for action rules

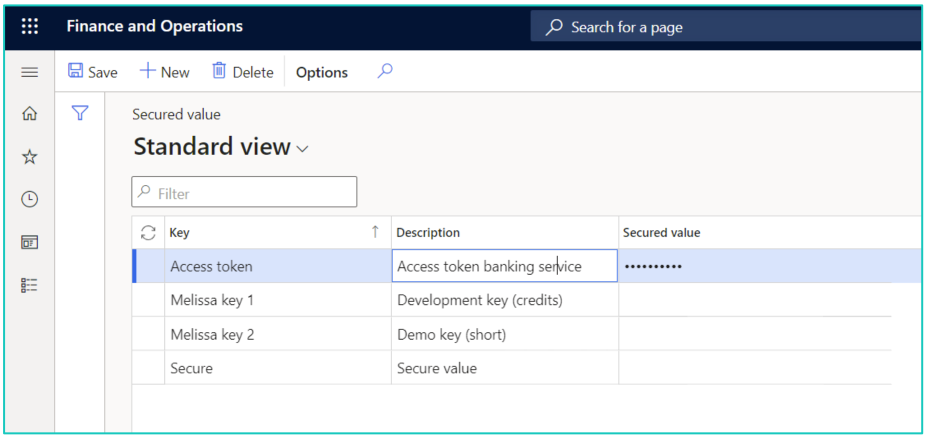
We added the option to setup multiple return values for a single web service call. When using address validation services, the service can return corrected data in individual columns. E.g. when sending an address, depending on the external service, it can correct the street name, complete the postal code for that address and return the longitude and latitude. One return value can be re-used for multiple database fields.

You can link the response fields with the database target fields in the **Web service response actions** part.

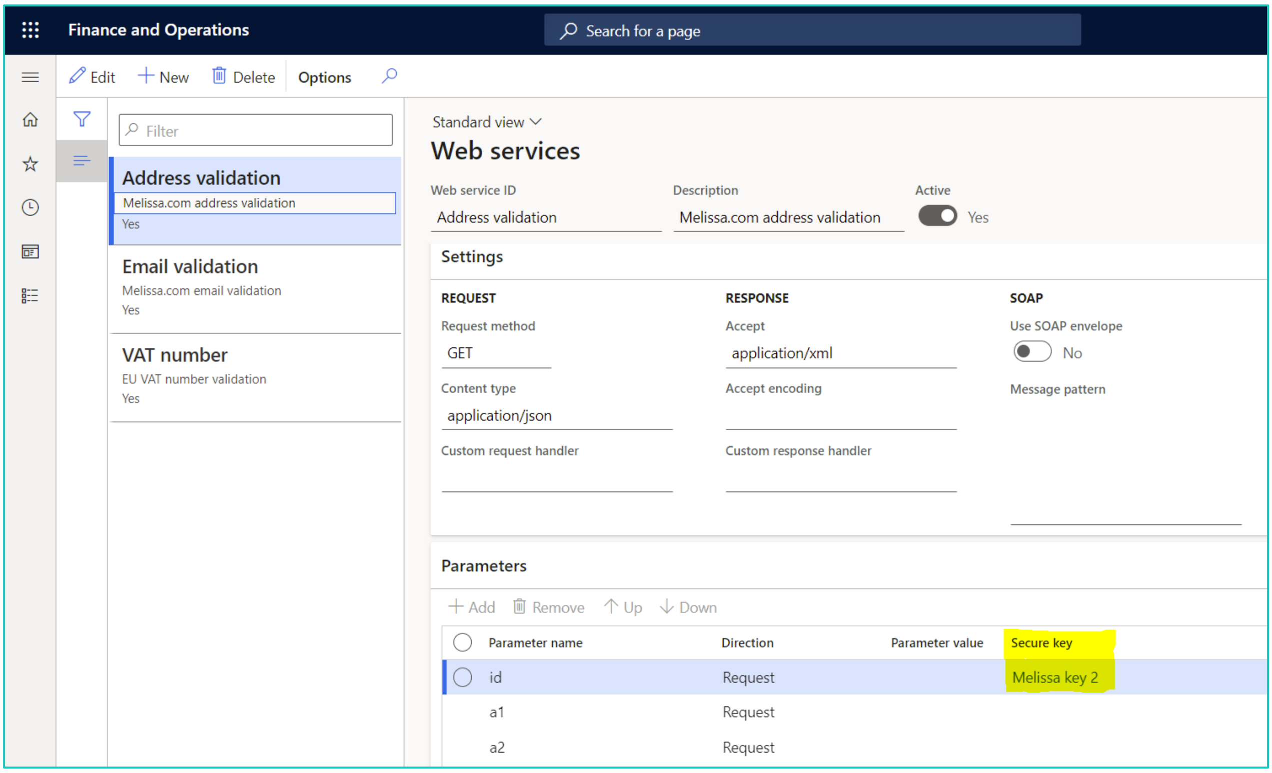


2.12.2 Secured values

We have enhanced the web service functionality where it is now possible to store license key or other sensitive data in a form **Secured values**. The secured value can be used as fixed parameter value for web services.



The values can be linked to web services on the parameters tab page.



2.13 Release 10.0.18.2

Data Quality Studio (DQS) is a new solution from Staedean that helps companies improve data quality and makes data governance simple in their Dynamics 365 environment. With quality data in the system the reliability of the data that is shown increases, which reduces the chances of making mistakes by users and management.

DQS is created for a functional administrator user with ease of use and flexibility in mind. The data quality administrator creates and manages the functionalities within DQS that can be activated and deactivated at any time. Developers can also call functions to have the same policies executed for specific scenarios. The functionalities in DQS is shared but can be restricted to legal entities directly or part of an organizational hierarchy.

There are various features in DQS for different kind or rules. These rules in DQS do the following to make ensure good data quality:

- Validation rule: Checks if the data meets the defined entered criteria.
- Duplicate check rule: Checks if the data does not have a duplicate value in the defined table.
- Action rule: Uses an action to set a value or to update data in a targeted field.

2.13.1 Validation rules

Validation rules is a functionality in DQS that uses defined criteria (rules) to ensure that data is entered correct in the system. These rules are triggered when you enter data on forms. If the rule is triggered a warning or error message can appear. The messages for users can be set up in the rule; also provided in multiple languages to support international implementations. Within the validation rule there are different types, that you can use to validate the data, these are:

- Mandatory: It is mandatory to enter a value in the field/record.
- Blank: Validates if the field/record is left blank.
- Range expressions: A validation is done if value is within the defined range.
- Data pattern: A validation is done if a field/record matches a predefined data pattern.
- Web service: A validation is done if a value matches in another internal or external source, by making use of a web service.
- Custom: A validation is done by making use of a custom created class with x++ coding.

2.13.2 Duplicate check rule

The duplicate check rule is a functionality that is used to check if there is no duplicate value in the defined table. A few examples where the duplicate check rule is useful to use are:

- Product name
- Social security number
- External item ID per customer or vendor

The duplicate check helps you prevent duplicate values, which can help prevent confusion for users.

2.13.3 Action rule

Action rules is a functionality that is used to populate values into a target field. This will support in quicker data entry or ensure correct values are used in certain fields. When creating a new record, enter a value in a field or before save the record, the application can enrich data. There are several action types that can be used:

- Fixed Value: Populates a predefine value in the selected target field.
- Data query: Make use of a dynamics query or inquiry to find a value to populate the selected target field.
- Transformation lists: Make use of a transformation list to find a value to populate the target field.
- Number sequence: Make use of a number sequence to populate the target field.
- Web service: Makes use of a web service to get a value from another internal or external source to populate the target field.
- Custom: Makes use of a custom action class, to populate the target field.

2.13.4 Organization assignment

Initially a data quality policy will be executed in all legal entities. A DQS policy can be assigned to a single legal entity or multiple legal entities. The policy can also be assigned to organizational hierarchies, which can also be set up in DQS, via the Data Quality hierarchy purposes. When organizations are assigned, the rules will be effective only for the legal entities as per setup.

2.13.5 Data patterns

Data patterns are used in Validation rules functionality. A data pattern is a criterion that is set up that a value should meet. A few examples of these criteria are the following:

- That a value must start with a capital letter.
- That a value must have a certain number of characters.
- That a value must meet the criteria of an email address.
- That value must meet the criteria for a zip-code of defined region.

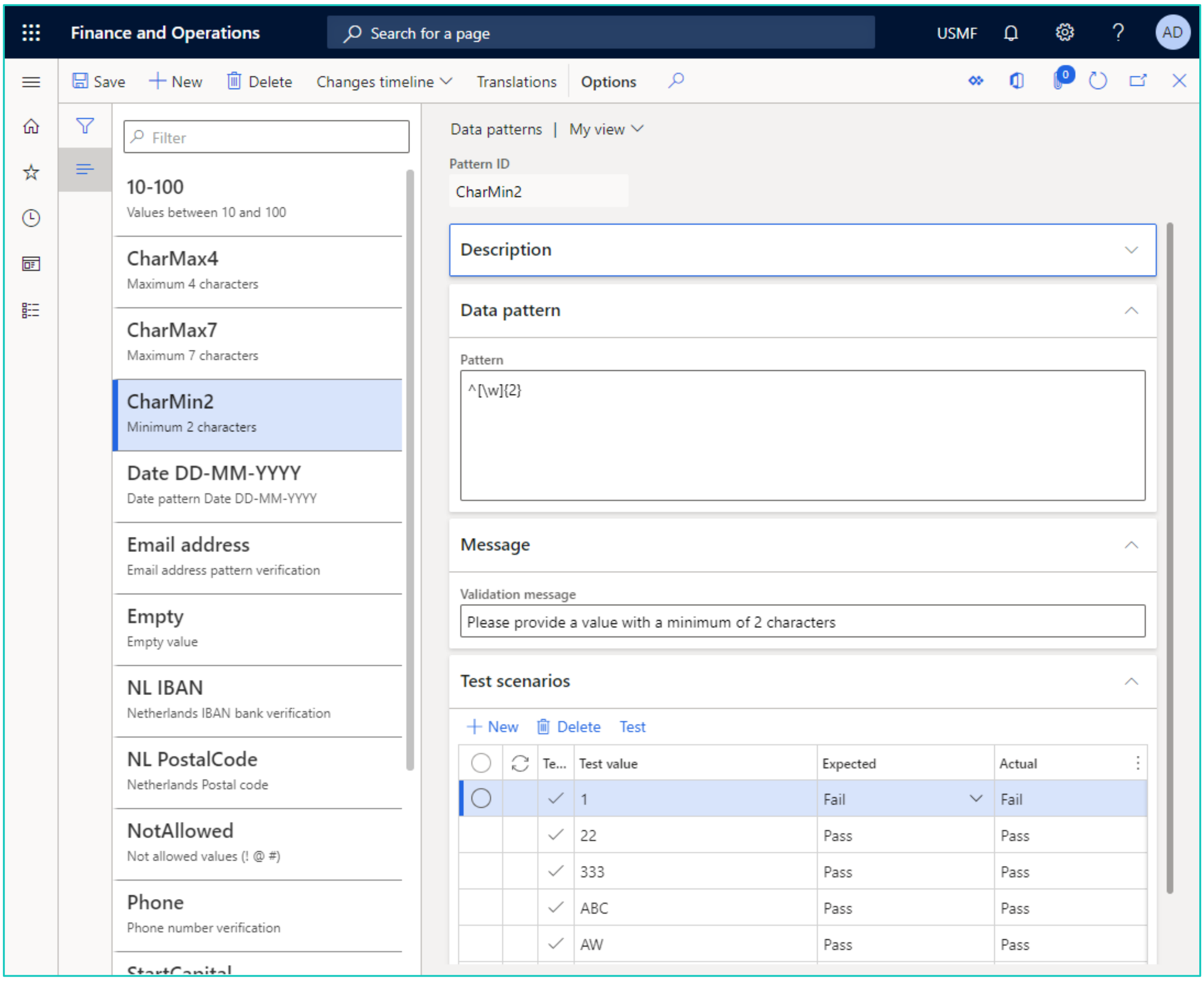
The data patterns are setup with regular expressions which is an open source standard for text patterns. There is a lot of information and examples on the internet, e.g.:

https://en.wikipedia.org/wiki/Regular_expression

https://www.regular-expressions.info/

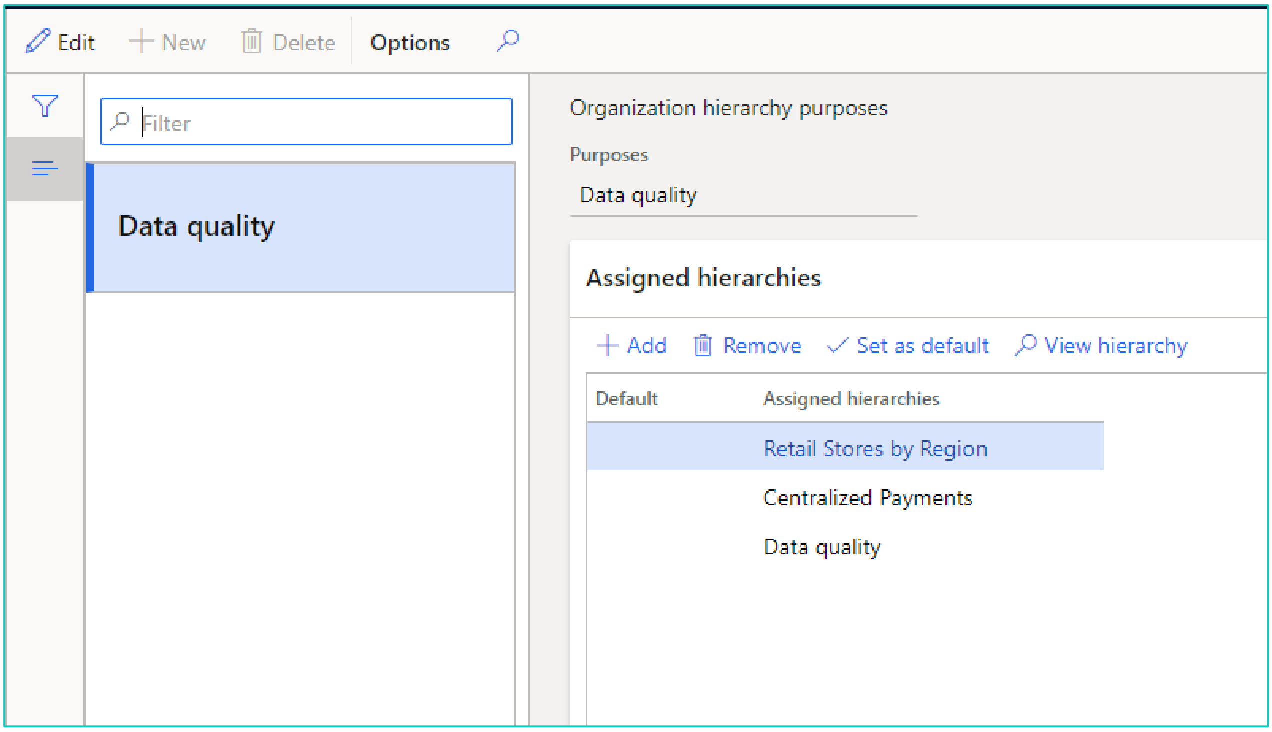
https://regexr.com

In the Data pattern screen a test can also carried out to see if the created data pattern meets the desired outcome.



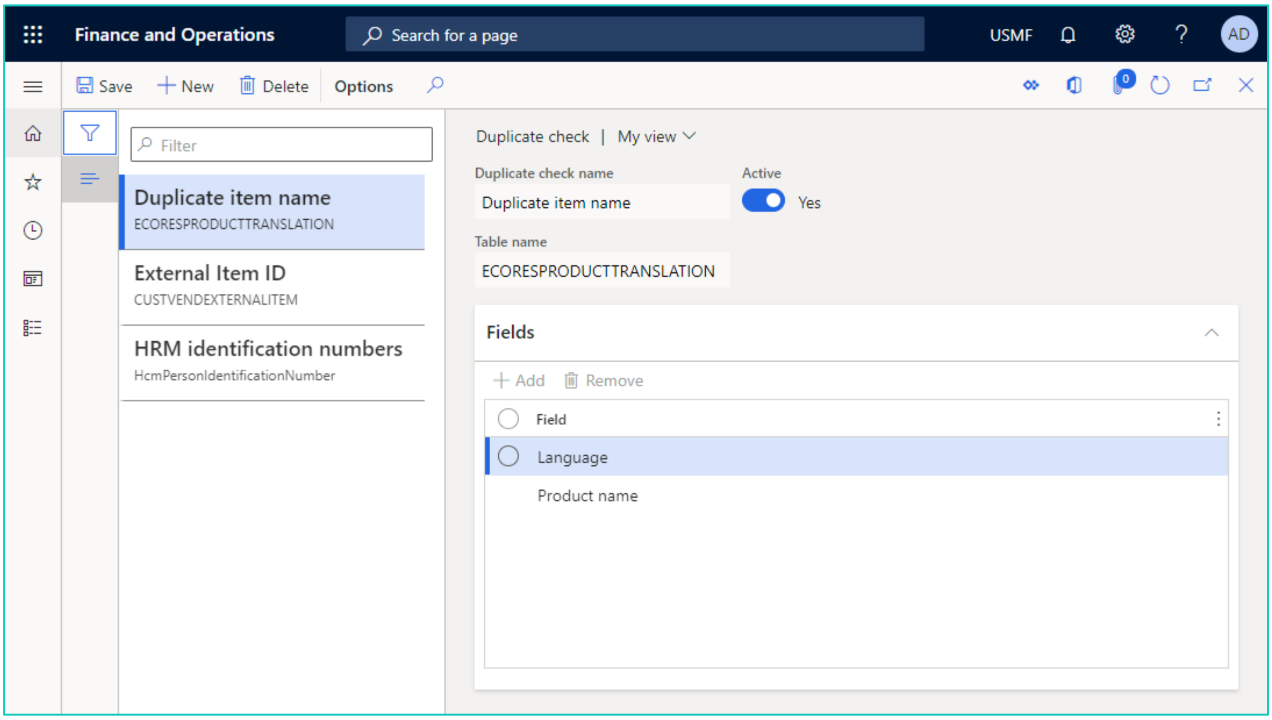
2.13.6 Data Quality organization hierarchy purposes

An organization hierarchy can be set up, which can be used in Organizational assignment in DQS. Various organization types can be used for the hierarchy; only the legal entities are functionally used to determine in what legal entity the rules will be effective.



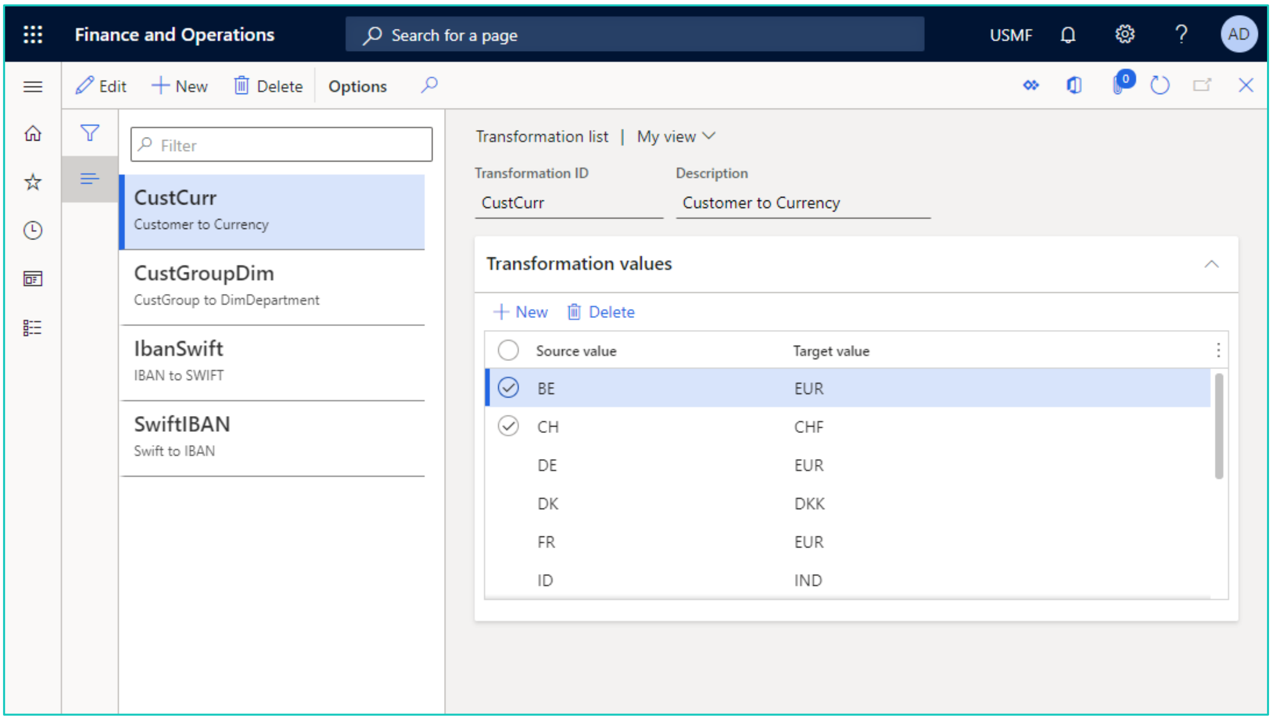
2.13.7 Duplicate checks

Duplicate checks can be set up to check if a value already exists in a table. The duplicate checks can be set up to check if a single value already exists in a table or that a combination of values need to be first met in order for the duplicate check value to be triggered.



2.13.8 Transformation list

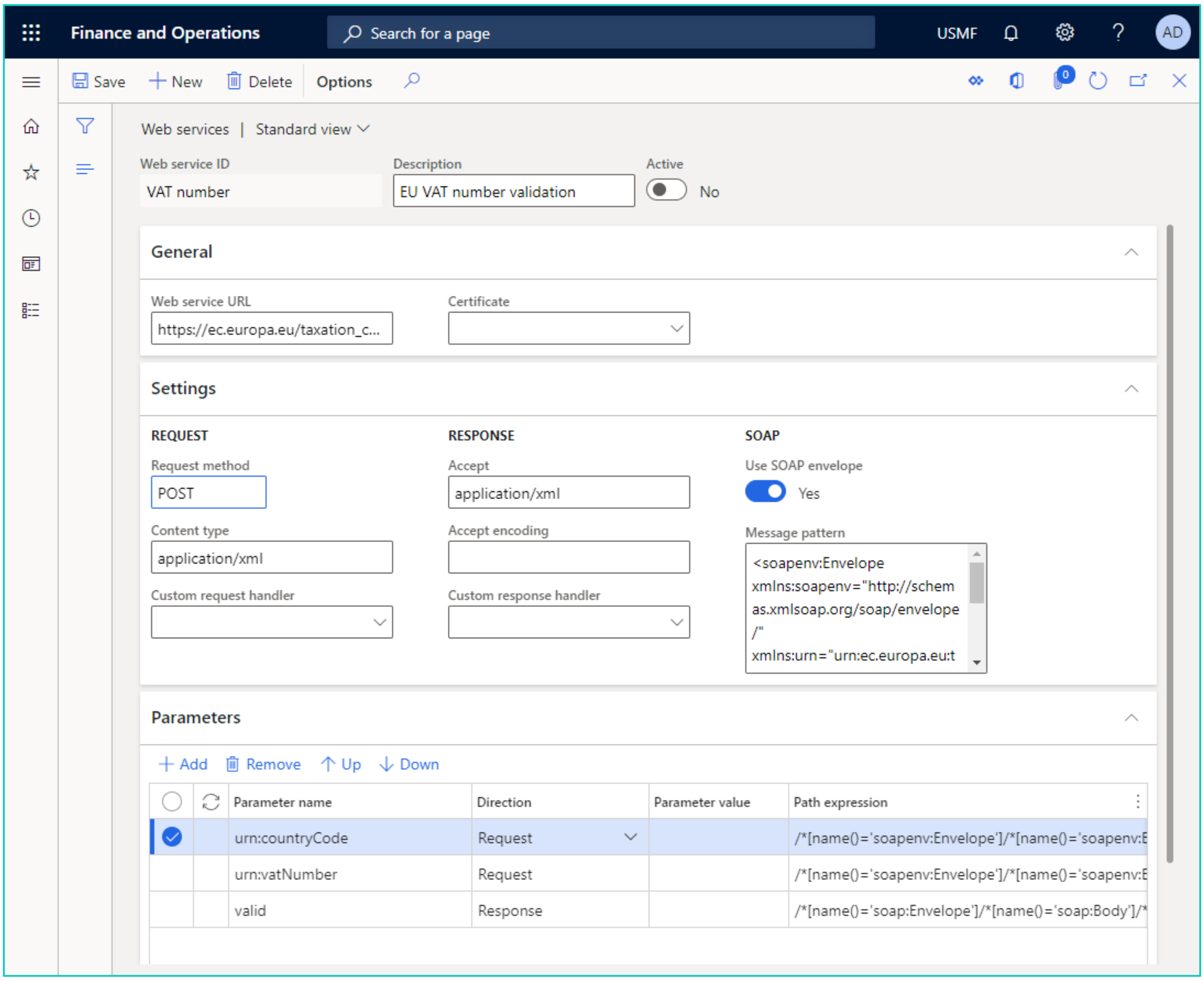
In the transformation list which is used in validation rule can be set up with a source value and a target value. The source value is the value that triggers the output for the target field. An example of a transformation list is currency. If the area code is NL (the Netherlands) the output in the currency field will be Euro.



2.13.9 Web services

In the web services setup page, a set up for the web service that will be used will be made. The following can be set up in this page:

- Web service URL with a related certificate
- Request method (Get or Post)
- Response
- SOAP (Simple Object Access Protocol)
- Parameters


Finance and Operations
Search for a page
USMF
AD
Save
New
Delete
Options
Web services | Standard view
Web service ID
VAT number
Description
EU VAT number validation
Active
No
General
Web service URL
https://ec.europa.eu/taxation_c...
Certificate
Settings
REQUEST
Request method
POST
Content type
application/xml
Custom request handler
RESPONSE
Accept
application/xml
Accept encoding
Custom response handler
SOAP
Use SOAP envelope
Yes
Message pattern
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:urn="urn:ec.europa.eu:t
Parameters
Add
Remove
Up
Down
Parameter name
Direction
Parameter value
Path expression
urn:countryCode
Request
/*[name()='soapenv:Envelope']/*[name()='soapenv:E
urn:vatNumber
Request
/*[name()='soapenv:Envelope']/*[name()='soapenv:E
valid
Response
/*[name()='soap:Envelope']/*[name()='soap:Body']/*

3. Bug Fixes

3.1 Current release

ID	Title
193533	CS00233561 | Configurable lookup street on Address This field will ensure that configurable lookup street field should appear only if the configurable lookup is configured for the address.

3.2 10.0.43.14

ID	Title
212530	DQS policy - ExchangeRate setup range validation not working This fix will ensure that user should be able to configure a validation rule that should restrict the user to specify the currency conversion rate for a currency pair within a specified range only.
213571	DQS duplicate check on InventTrackingRegisterTransView doesn't work This fix will ensure that user can be blocked from creating duplicate record in InventTrackingRegisterTransView among different records.

3.3 10.0.41.13

ID	Title
192179	CS00233369 | Duplicate check is active after creation This change will ensure that while creating a new duplicate check setup, the setup must be inactive by default.

3.4 10.0.41.12

ID	Title
197542	CS00234128 | Error in Fixed Assets module due to Data Quality Studio This fix will ensure that the user must be able to transfer a fixed asset to a financial dimension.

3.5 10.0.40.11

ID	Title
186854	Configurable lookup is not working with conditions in DQS. The fix will ensure that the configuration lookup functions correctly under the conditions set in the DQS Studio.
195588	Internal: On activating the data quality policy without clicking on the save button, application prompts Object Reference error and validation is not applied to the field. This fix will ensure that whenever an existing policy is updated, the validation rule changes must be implemented immediately in the application.

3.6 10.0.39.10

ID	Title
186326	CS00232553 | Error when opening Year-end close template setup The fix will ensure that the user is able to perform the following operations on the “Year end close template setup” page within Ledger setup section of the general ledger module: • Add a new year end close template. • Add new legal entities on the Legal Entity fast tab. • Modify the field values on the Balance sheet financial dimensions fast tab. • Modify the field values on the Profit and loss financial dimensions fast tab.
187341	While specifying the condition for an action rule, the Edit query button is not enabled. This fix will ensure that the “Edit query” button must be enabled while adding a condition for the validation rule or enrichment rule.
187679	While defining an action rule or enrichment rule for dimension field (including inventory dimensions) and specifying the action type as "Fixed value", application is not populated the configured values for the selected dimension attribute. This fix will ensure that while specifying a fixed value for the dimension attributed in the application, application must allow the user to select the value for the attribute using the drop-down field and the drop-down field must populate the values configured for the selected dimension attribute. Earlier, the drop-down field was not populating the values configured for the selected drop-down.
187906	"Condition table mapping" page is taking longer time to load (approx. 15 seconds) This fix will ensure that the “Condition table mapping” page must load faster.
187909	For the sales order, the application is not auto-populating the fixed value for address based on the selected return reason code. This fix will ensure that if the action rule or enrichment rule has been configured to populate the fixed values for an address field based on the source field modified action, application must populate the address when the source field is modified.

3.7 10.0.38.9

ID	Title
183155	Internal - Configurable lookups are not working in DEW in January release This fix will ensure that the DQS Configurable lookup must be working with data entry workflow templates as well.
183681	CS00232305 | Year end close This fix will ensure that the user is able to perform year end close template setup on the year end close page.

3.8 10.0.37.8

ID	Title
165889	Internal - Parameters Up and Down are not moving records correctly on Web services form. On the Parameter fast tab of the Web service page, the up and down button must move the selected parameter up and down as selected by the user.
171427	Internal - After deleting Policy From data quality policy page it's not getting displayed in retired data quality policy page. This fix will ensure that the deleted policy must appear on the *Retired Data Policy* page.
176659	Internal - Range expression as a Field validation and record validation is not working if outcome is warning. For the regular expression validation, if the warning message is configured, then while adding a record if the validation fails, then the warning message must appear on the screen.
178415	Internal - Importing action rule results in string error on customer form. This fix will ensure that while importing an action rule the application must not prompt any error message on the related form.

3.9 10.0.36.7

ID	Title
108849	Internal - Table group validation-Warning not working. Parameter settings to determine what type of tables would be allowed to use in quality policies was not giving a warning as per setup. This has been fixed.
108923	Internal - Number sequence validation-Warning not working. Parameter settings to determine if it is allowed to use number sequences setup in other areas of the application was not giving a warning as per setup. This has been fixed.
109384	Internal – Dimension field support known issues. Action rules did not work for financial dimensions and array type of fields. This has been implemented in this release.

171864	Internal - Range expression not working correctly for decimal and integer value '0'. In case a range was set for e.g. 0..400, this was giving an error in case the value was 0. This has been fixed.
173341	Internal - Dynamic query framework - Functions refresh does not populate custom DQFFunctionRun classes Custom functions are now refreshed correctly.
174104	Internal - Error when creating a new contact for vendor. We found a regression with showing financial dimensions for new customer creation. This error has been fixed.
174546	Internal - Fuzzy duplicate check throws error if a non-string field is present in the query. This has been fixed.
176127	CS00227171 | Empty record is created in the table, while creating a new record without a form name. On the Dynamic menu form setup, it was possible to create a setting with an empty form name where the table setting would require a value for this field. As this might be related to a specific bug on the grid control from Microsoft, we implemented an additional validation to prevent having the setup with an empty form name possible.
176128	CS00227170 | Error "You're not allowed to access this page" error message when creating customers/prospects for all users except system administrators. This was due to a missing security validation for fuzzy logic duplicate checks. This issue has been fixed by evaluating the user permission before executing a duplicate check.

3.10 10.0.34.6

ID	Title
115327	Action rule not working for financial dimension of customer table In case with an action rule dimension values were filled, upon customer creation, the values were not applied. It got overwritten by the default dimension settings on customer groups. This has been fixed where the dimensions will now be merged instead of overwritten.
170616	Dynamic Query Framework - Preview results are not showing correctly when same table is created in query multiple times. The framework has been enhanced to cover this scenario in the correct way.
170452	Copy DQS policy is not copying the 'Use as response' and 'Configurable lookup' fields. This has been fixed.

3.11 10.0.32.5

ID	Title
138116	Parameters not updating correctly on changing webservice for validation rule or action rule in data quality policy.

	Now when changing the webservice on a validation or action rule, the user will be asked for a confirmation to change the setting. After the confirmation, the list with request and response parameters will be refreshed.
164014	Duplicate checks is throwing a duplicate error when the new record is created with blank field. In case duplicate checks has been set up for non-mandatory fields, the value could be left blank. In that case, the duplicate check was not working correctly. This has been fixed.
164867	Error "Global::inRange Unknown type: AnyType" when executing webservice validations. In case the webservice did not return a field, which was set as response parameter, the mentioned error could be thrown to the user. We changed the logic to capture the error and assume it should be treated as a not valid webservice validation.
165408	Validation rule with web service does not work as expected when output parameter is compared with blank value. When we expected an empty value as a valid response, the logic was returning an incorrect validation result. This has been fixed.
165409	Web services parameter setup allows blank parameter name. We changed the validation. Now it is not possible to setup a request or response parameter without a name specified.
165410	Validation required to ensure webservice has at least one response parameter with "Use as response parameter" checked. To ensure proper setup of the application, there is now a validation added when activating a policy to check if each validation rule with a web service has at least a response parameter activated.
165710	Validation rules and action rules getting saved without policy. When creating a new policy, validation rules and action rules could be created without first having saved the policy. The policy reference was at that time not filled for these rules. This has been fixed.

3.12 Release 10.0.31.4

ID	Title
123762	Enumeration values not easy within action rules. Enumeration fields expected internal integer values. Now you can use the enum label in the current system language.
137873	Error thrown after deleting the policy and creating data quality policy with same ID and Name In case a policy has been retired, a more understandable error is raised to the user.
141398	Error when filling Validation message for a validation rule When creating a rule and add a validation message without manually saving the rule resulted in an error. This has been fixed.

158418	No security implemented for Secured values In release 10.0.28.3 the secured values feature was released, but security artifacts were missing. This has been corrected in this release.
163101	Security issue Dynamic Query Framework. A non-system administrator was able to query data which were not part of the permissions. This has been solved to prevent access to sensitive and private data.
163523	Lookup for custom action rule is empty despite classes meet the condition In certain scenarios the field type for the target field was not evaluated correctly. This has been fixed.

3.13 Release 10.0.28.3

ID	Title
143247	Internal | Duplicate check rule not always executed when updating records. The duplicate check logic has been enhanced to cover both inserts and updates in a correct manner.
138571	Internal | Custom Response Handler field showing values from the previous selection on data quality policies form
138115	Internal | Field and field value not displayed correctly, when webservice is selected in Data quality policy validation rule
127033	Internal | Selecting a web service output parameter on the Action rule throwing a warning
127590	CS00177048 | Issue in new release product OK button after installing DQS A workaround was to enable DQS. Due to an incomplete condition, the OK button on the product creation dialog was not working. This has been fixed.

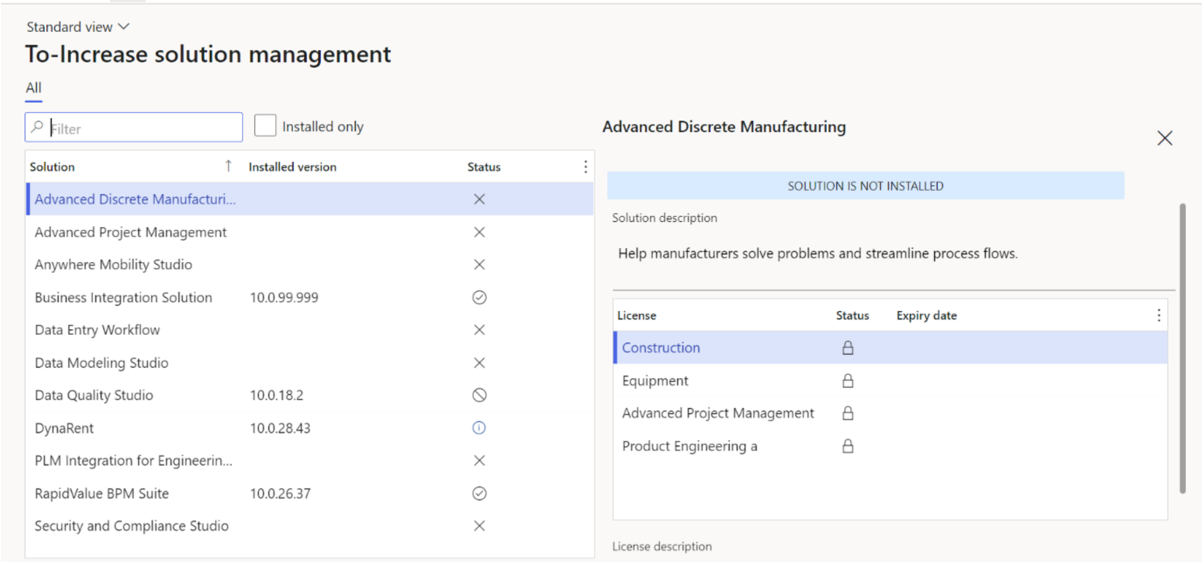
4. Common Features

Staedean 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 Supply Chain Management platform. As of November 2022, we are 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 Staedean 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.

Below is the list of changes in common library in Jan-2025 release:

#	Issue	Description
1	Deprecation fix	This will ensure that the STAEDEAN License team can generate and upload license files to Azure Blob Storage without any impact. Additionally, customers will be able to retrieve their license files from Azure Blob Storage seamlessly.
2	Enumeration translation fix	This will ensure that customers do not encounter any issues while using the 'Populate Enumeration Translations' process.
3	Solution management batch job issue	This will ensure that customers do not experience any issues while performing deployments or maintenance mode activities.
4	To hide the 'Used' column in Solution management	This will ensure that no confusion is caused to customers due to the accuracy of the Used column data.
5	In-App feedback - tenant fix	This will ensure that the In-App feedback does not automatically pop up for STAEDEAN users.

5. Discontinued Features

The following feature will be discontinued from Data quality studio in Jan-2025 release:

- Action rules: The action rules will be discontinued from data quality studio in Jan-2025 release. A new feature named ‘Enrichment rule’ has been implemented in data quality studio, which is an enhancement of the action rules.

  This enrichment rule can be enabled from the ‘Data quality studio parameter’ page.

6. Known Issues

In this section the known issues and limitations that are currently in DQS will be highlighted. These issues or limitations can also be due to standard Dynamics 365 limitations. Known issues and limitations:

- Released product creation dialog form: Today, only validation and duplicate check rules are supported. Action rules will be implemented in the future release.
- Providing a value for enum fields as target in action rules does not accept the label; in the current release the integer value should be provided. E.g. ‘No/ Yes’ will need a value as 0 for ‘No’ and 1 for ‘Yes’. This will be enhanced with the next releases.
- The duplicate check with fuzzy matching is not working together with an advanced dynamic query where the same table is used multiple times. This will be solved in the next releases.
- While making the changes in a data quality policy, we need to ensure that the changes are Saved (to ensure that metadata is refreshed) and after saving the change, the policy must be activated. In the next release, we will ensure that metadata is refreshed even if user clicks on Mark Active button without clicking on Save button.
- French translations will not be available in the version 10.0.42.13.

In general, the Data Quality Studio solution 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. The events will be executed on forms with a data source. There are various places in the application where forms don’t have a data source or where x++ coding is used to insert or update records. One example is the product creation dialog form in the standard application. On this form, there is no data source used at all; only at time of closing the dialog, the tables will be populated and inserted in the database. We have extended the logic, so it can check for valid data entry. We have also done this in several other places where we found a gap during the development and testing. If there is any use case where the rules are not executed as intended, please contact us, so we can verify if and how this should be supported.

If you are using action rules, in certain cases, the values updated in the target fields can be overwritten by standard business logic. Test the scenarios carefully before applying it in your production environment.

Together with the solution, we provide tutorials as separate model for custom extensions on validation rules. The tutorials are provided ‘as-is’ and not supported as part of the main application. The tutorials are for learning 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 to the application directly and via Feature Management. Sometimes these are public previews 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 Staedean support.