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# RapidValue BPM Suite –10.0.39.46

Release Notes

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# Document information

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# 1. Introduction

## 1.1 Purpose

This release is compatible with Microsoft Dynamics 365 for Finance and Operations release 2023 (10.0.33), platform version 57 or later.

## 1.2 Audience

This document is intended for new or current RapidValue partners and customers. Some knowledge of the Microsoft Dynamics 365 for Finance and Operations and prior versions of RapidValue is assumed.



## 1.3 Certificate Renewal Information

As an Independent Software Vendor, we provide you with licenses which can be used to enable/use our solution. These licenses are based on a Microsoft certificate which is part of our solution. The security certificate, that expires every 3 years, ensures that our customers have valid To-Increase 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 To-Increase 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 3 simple steps.

Step 1: Install the update and navigate to the Solution Management Workspace

Step 2: Click the 'Retrieve available licenses' in the action pane.

Step 3: Validate the licenses for correctness and completeness and click import.

Click [here](#) for more information on the Solution Management Workspace.

## 1.4 Deliverables

Deliverable	Description
Solution package	RapidValue BPM Suite is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package. A To-Increase security certificate is included to allow trusted installation of the provided model files and ISV license files.

Release notes	This document is provided with the RapidValue BPM Suite product deliverables and can be downloaded from the solution package.
Implementation methodology	The solution package contains a <i>RapidValue implementation methodology</i> that provides detailed step-by-step instructions on how to install, learn, and implement RapidValue.
Getting started BPM library	The solution package includes a <i>Getting started with the RapidValue BPM Suite</i> BPM library. This library contains a number of task guides that showcase some of the key capabilities of RapidValue.
Documentation BPM library	The solution package includes a <i>RapidValue BPM Suite documentation</i> BPM library. This library contains a comprehensive set of task guides that document how to use RapidValue for your BPM activities. This documentation is provided in U.S. English only.
Process data package	The solution package provides a simple <i>RapidValue demo</i> process data package that can help you get started from LCS.

## 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.

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**?

1. Please go to the Solution Management Workspace in your F&SCM environment
2. 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@to-increase.com](mailto:customeroperations@to-increase.com)

## 1.6 Product release information

RapidValue 10.0.39.46 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.33. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version 10.0.33 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.39, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.

Release date	Version number	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
05/10/2023	10.0.36.44	10.0.31	10.0.36	10.0.31 and above
25/01/2024	10.0.38.45	10.0.32	10.0.38	10.0.32 and above
16/04/2024	10.0.39.46	10.0.33	10.0.39	10.0.33 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.



To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : [Knowledge Base - Support - To-Increase](#)

## 2. What's new in RapidValue BPM Suite

No New feature released in this release.

### 2.1 Additional field in rapid value under requirement type " Data Migration"

When creating a requirement and assigning that to a business process ,now additional field i.e. Data Migration is added to drop down menu. Now user can select a requirement type as Data migration. You can short the requirement based on a type.

### 2.2 Moving multiple flow elements in a single task.

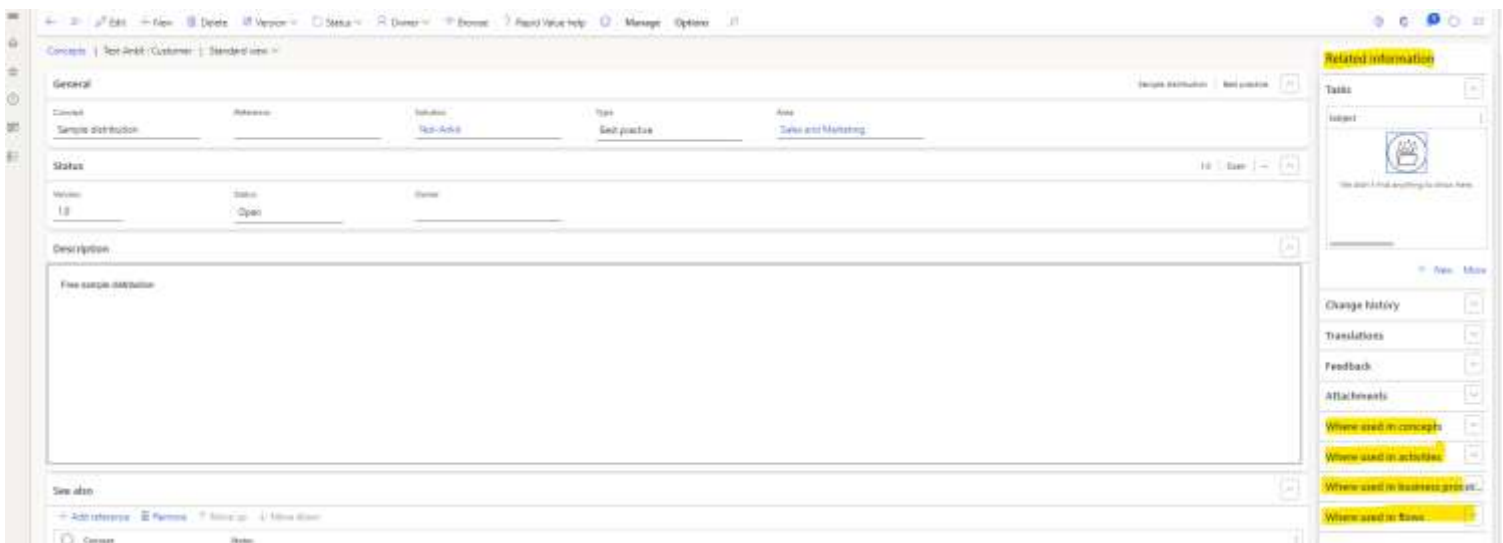
When publishing documentation from RV, the sequence of the elements is important. This defines the sequence in which the element explanations/descriptions are shown in the published documentation. By default, the element sequence is the sequence in which the elements are added to the flow. However, most of the times, that's not the desired sequence. So, you have to manually change the sequence.

When changing the element sequence for a flow, you often have to move several elements up or down. However, earlier you can only do so one element at a time. Now you can move several elements in one go.

### 2.3 Added where-used fact box to Concepts.

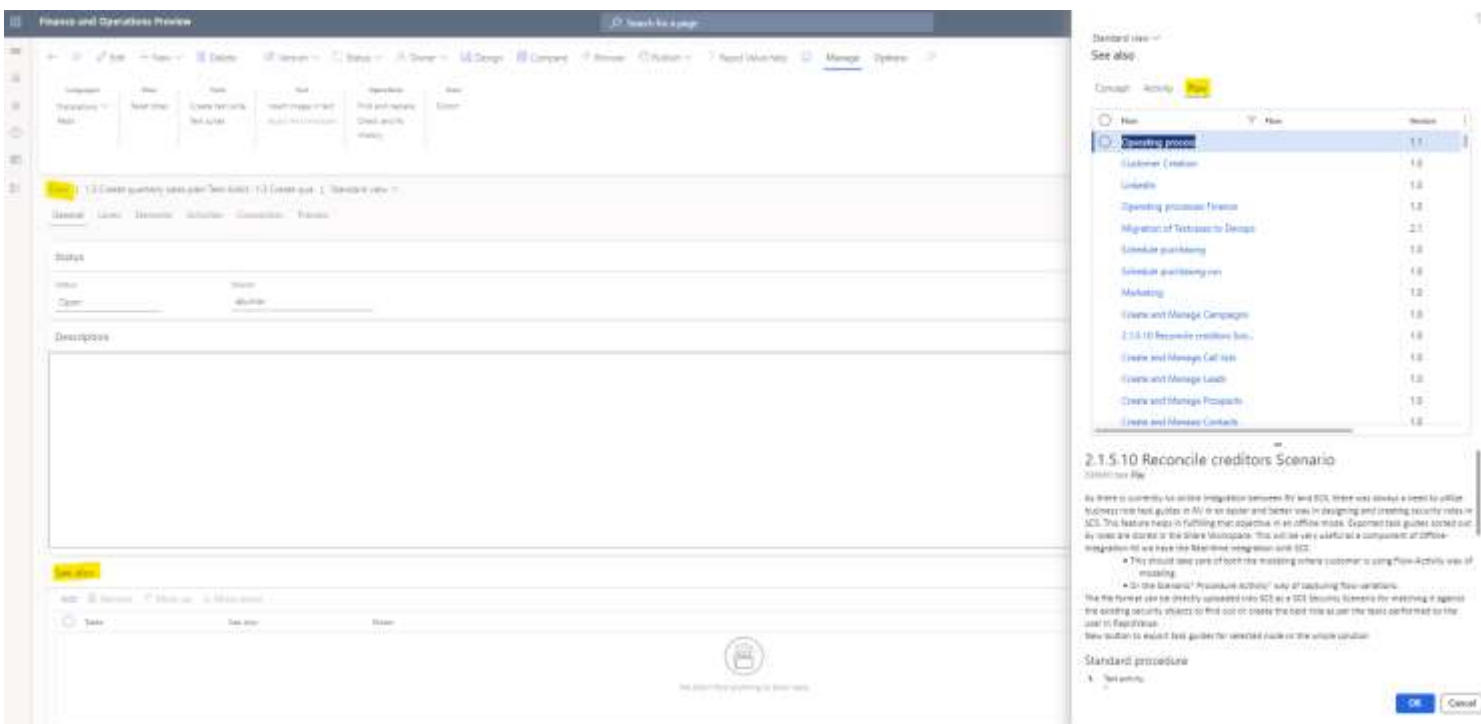
A Concept can be used in different business processes, Activities, Flow and concepts. By using Where used fact box to that concept a user can get to know the information about that particular concept.

Modules→RapidValue→Business Process Modeling→Business Model→Concept



## 2.4 Enable references to RapidValue elements of the same type.

When you are working with Concepts, Flow or Activities. You can add references to it under “See also” tab. Now you can add references to that element of same type. For example a flow can have a sub element as flow.



## 2.5 Support for multiple languages.

At To-Increase, we are constantly working to upgrade our solutions and also 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.

Previously we do support Canadian-French language and as of 12-Apr-2023, we do support the RapidValue 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.

To-Increase 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 To-Increase label file in the English language is TILabel.en-US.label.txt, the new translation in German provided by To-Increase 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: List all label files.

BPM\_da.xml  
BPM\_de.xml  
BPM\_en-us.xml  
BPM\_es.xml  
BPM\_fr-CA.xml  
BPM\_it.xml  
BPM\_nb-NO.xml  
BPM\_nl.xml  
BPM\_pt-PT.xml  
BPM\_sv.xml

Excluded from our translations:

- To-Increase 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.

## 2.6 Logging and Translation option in RapidValue.

- In RapidValue we can log what we copy. Logs are available under the import history in Business process management.
- The wizard for copying a solution now has a new option to specify whether you want to copy the translated content.

The screenshot displays the 'Business process management' interface. On the left, there is a 'Summary' section with buttons for 'New solution wizard', 'Import Wizard', and 'Parameters'. The main area is titled 'Manage' and contains a sidebar with options like 'Solutions', 'Change history', 'Operation history', 'Import history', 'Export history', 'DevOpt synchronization history', 'Statistics', 'Tasks', 'Feedback', and 'All files'. The 'Import history' section is active, showing a table of import details.

Created date and time	Name	Records	Mode	Created by	Duration
4/13/2023 8:03:14 AM	Copy solution	0	Direct - Import data without an...	Admin	00:06:51
4/13/2023 6:29:27 AM	Scandic - Export - 20230403 - 2...	20872	Selective - Analyze data and spe...	Admin	00:07:13
4/13/2023 6:21:33 AM	testdevoptsync.xml	285	Selective - Analyze data and spe...	Admin	00:00:17
4/13/2023 6:36:13 AM	Copy solution	0	Direct - Import data without an...	Admin	00:00:17
4/13/2023 8:08:28 AM	Copy solution	0	Direct - Import data without an...	Admin	00:00:17
4/13/2023 7:57:57 AM	Copy solution	0	Direct - Import data without an...	Admin	00:00:17

## 2.7 Adding Common features to RapidValue.

Standard view ▾

### New solution wizard

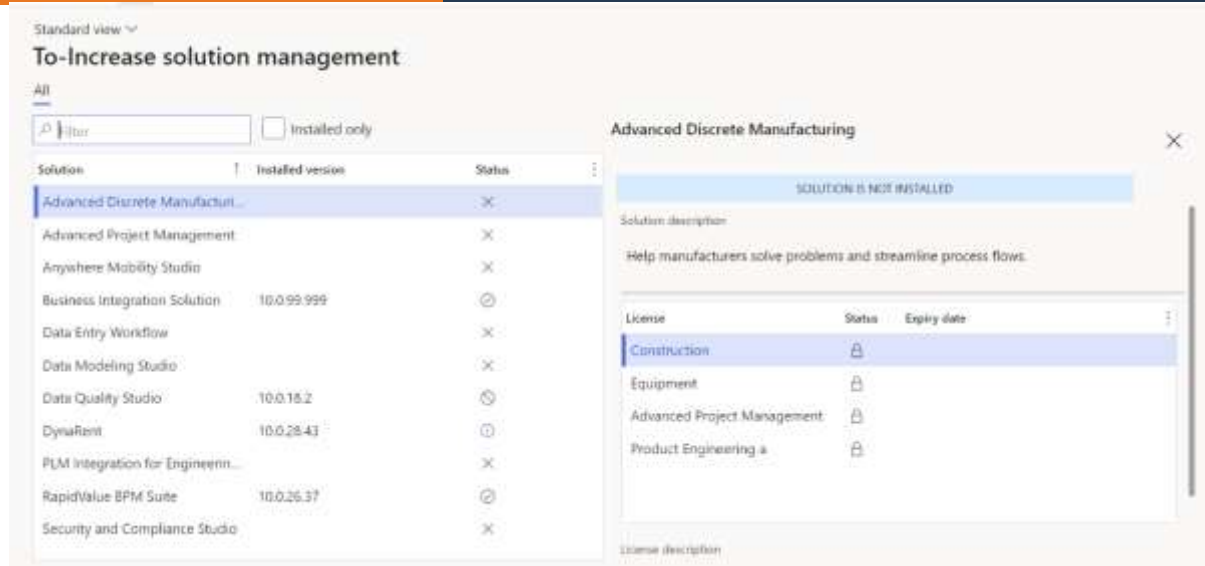
REUSE OR COPY ELEMENTS USED IN THE BASE SOLUTION	COPY IMPLEMENTATION DATA	COPY FIELD VALUE
<input checked="" type="radio"/> Reuse all elements	Requirements <input checked="" type="radio"/> Reuse	Scope <input type="checkbox"/> No
<input type="radio"/> Copy base solution elements and reuse other elements	<input type="radio"/> Copy	Verification <input type="checkbox"/> No
<input type="radio"/> Copy all elements	<input type="radio"/> Do not copy	Status <input type="checkbox"/> No
<b>COPY FULL OR PARTIAL BUSINESS PROCESS HIERARCHY</b>	Tasks <input type="checkbox"/> No	Owner <input type="checkbox"/> No
Scope <input checked="" type="radio"/> Copy full business process hierarchy	Test specifications <input type="checkbox"/> No	
<input type="radio"/> Select business process hierarchy	Test runs <input type="checkbox"/> No	
	DevOps Mappings <input type="checkbox"/> No	
	Translations <input checked="" type="checkbox"/> Yes	

To-Increase is offering various add-on solutions. Some features and technical solutions are common or could be common for all our solutions on the Dynamics 365 Finance and Operations platform. As of November 2022, we will start leveraging a new common library model.

The common library model will be a centralized location where the new common features will be added automatically and customers don't have to make an additional effort to update the build pipelines after the first enablement of this model.

ISV licensing is technically supported with a code signing certificate. The certificate we have to use is expiring every three years, next up for renewal in 2023. In the near future, our solutions will refer to this common model for the code signing certificate, instead of maintaining it separately in all our solutions.

Next to technical content, the common library comes with features which are beneficial to our customers. E.g. a Solutions Management dashboard gives a clear view of currently installed versions, status of license, option to renew licenses without any downtime, easy access to release notes and documentation, and the ability to leave feedback through the in-app feedback system.



On all To-Increase forms, there is on the left-top of the forms a smiley icon in the menu where you can provide us feedback, suggestions and ideas so we can learn how improve our solutions.

?

### To-Increase would love your feedback!

Please rate your experience in using the All solutions screen.

5 - Excellent  
 4  
 3  
 2  
 1 - Poor

Please tell us why you chose the rating. Additional insights would help us improve our products further.

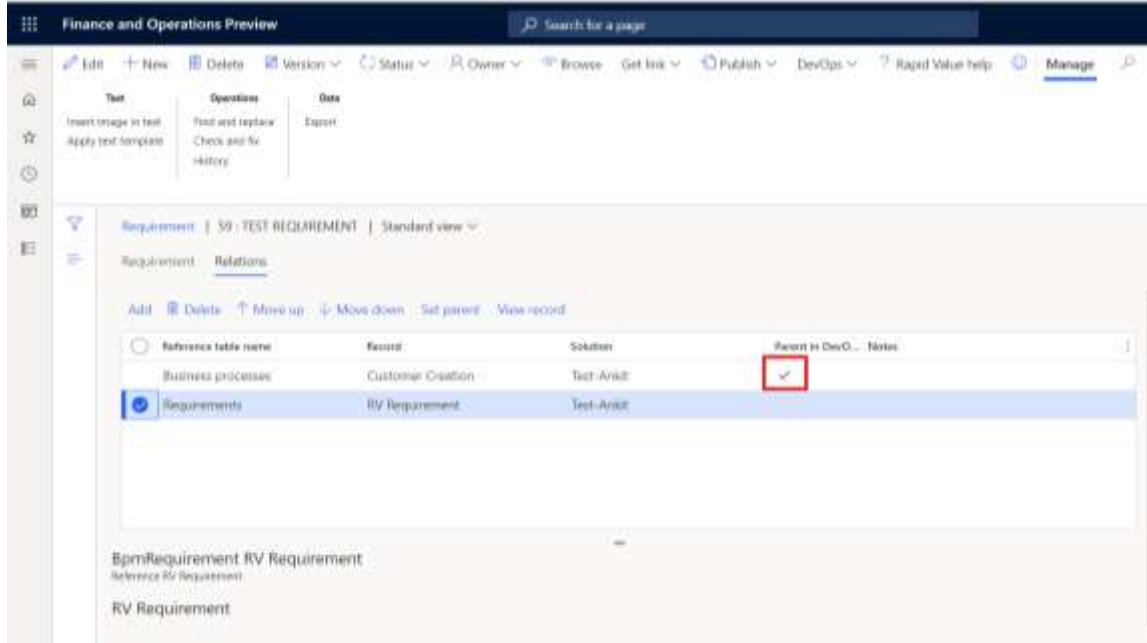
Thank you for providing us feedback!

Your privacy is important to us. To protect your privacy, please don't include any personal information.

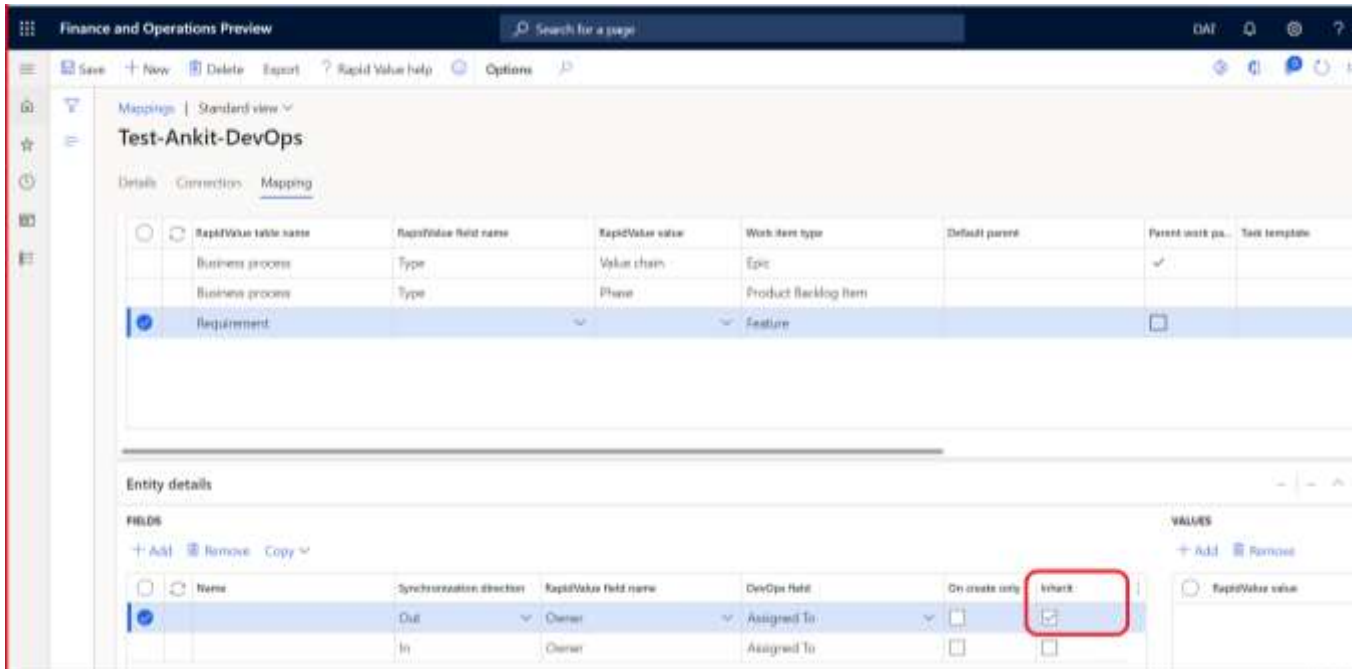
## 2.8 Enhancement to the Azure DevOps mapping for better synchronization of requirements.

In RapidValue you may synchronize a solution, business process, and requirements with DevOps. You may synchronize the data between both, based on the DevOps mapping configuration.

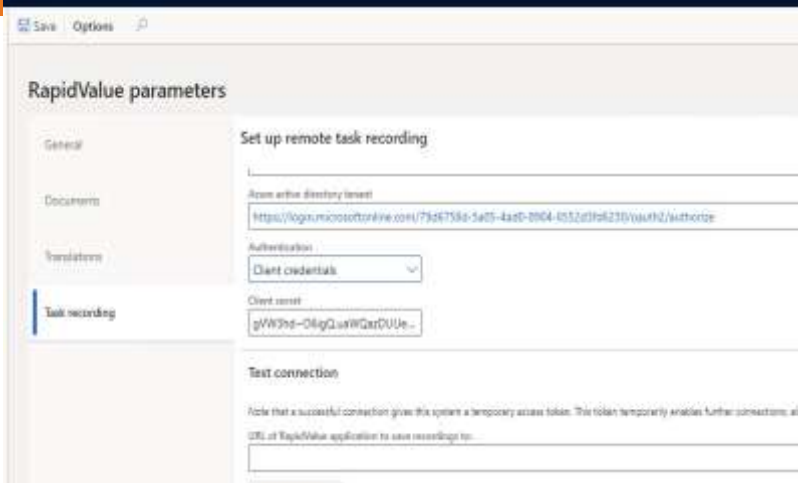
- When setting a requirement, the checkbox (under the relation tab) is already set to its default set condition. This ensures that the work item of the requirement will get the work item of the related record as its parent.
- This field can be populated now by the 'Set parent' button.



- Inherit value from the parent work item in DevOps.



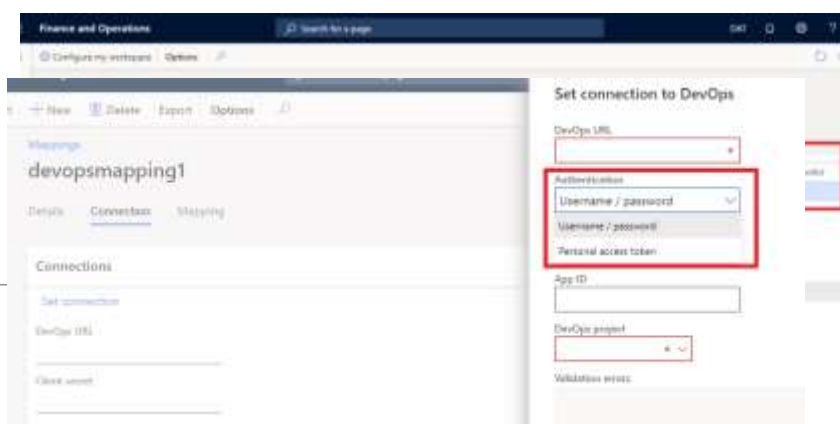
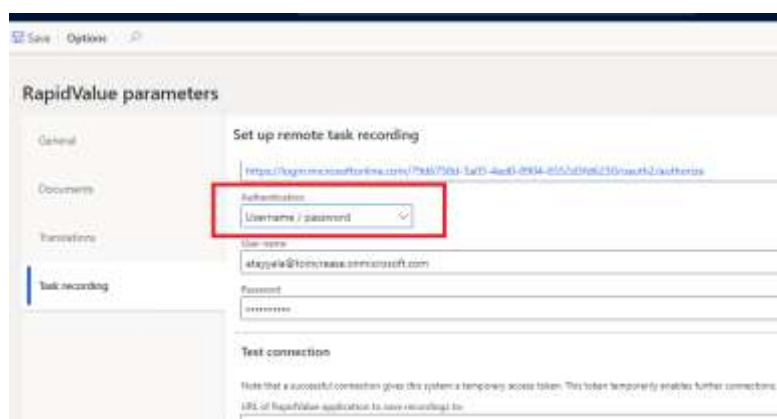
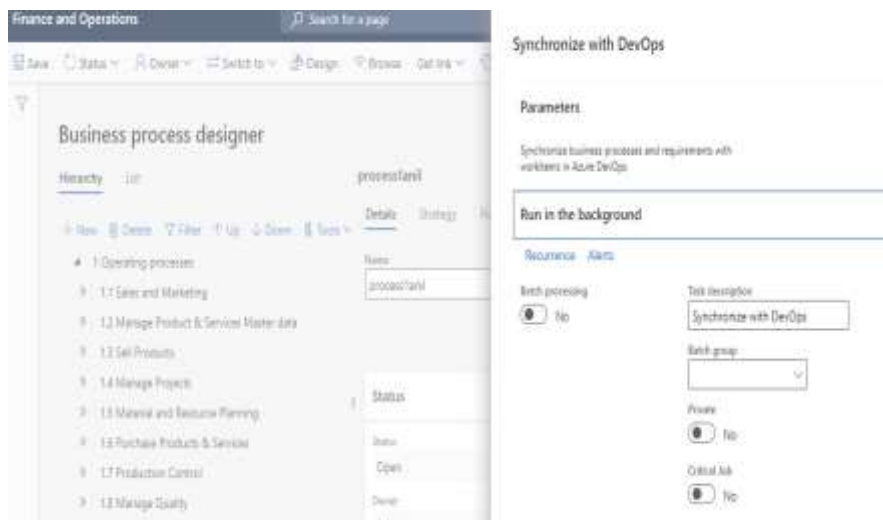
## 2.9 Batch Processing of DevOps synchronization and Multifactor Authentication (MFA)



RapidValue and Azure DevOps data can be synchronized in both directions. However, this synchronization needs to be triggered in a manual way. To make sure both systems are in sync, a near real-time synchronization is required. The current synchronization needs a manual authorization step which expires after a couple of hours. This needs to be

changed so that the manual step will be eliminated.

RapidValue BPM Suite –10.0.30.40 is compatible release of Microsoft Dynamics 365 for Finance and Operation, Enterprise edition, with platform update 24 or later





- Adding capability to reuse Organizational elements from Standard modules when defining various data elements in Rapid Value BPM Suite.

You can now choose to reuse the following elements from Standard modules while defining the following Rapid Value components.

- Legal entities, Operating units, Departments, Teams,
- Positions,
- Persons,
- Skills,
- Roles and
- Trainees

This makes it EASIER for the customers who are using Rapid Value to align these elements with the corresponding D365FSC elements already defined. This will help in saving much work for the customer to maintain both in D365FSC and RV data model separately. At a high level these enhancements seek to improve synergy between RV and Standard modules on three different themes:

1. Organization Hierarchy Definition and maintenance. ( RV <-> Org Admin)
2. RV Business roles and Standard security roles. ( RV <-> Security configuration)
3. Improving synergy between RV Trainees/Modules/Exercises and Human Resources Courses. ( RV <-> Human Resources)

- Adding capability to configure new static statuses for Requirements for better Task Management with RapidValue-Azure DevOps integration.

You can now choose to enable a system parameter in RV to get many more statuses on RV Requirements. This helps customers to better manage the workflow on the RV-ADO integration when working with Requirement Status (in RV) and Work item status (in ADO).

- Adding capability to append reference numbers as well along with the business Process names in the title filed in Azure DevOps.

You can now choose to get the Reference numbers appended with the Business Process Name from RV to appear in the Work Item **Title** field. This significantly enhances traceability for the users.

- Ability to export RapidValue flow activity Task guides or Scenario Procedure activity Task Guides to be consumed by Security & Compliance Studio as a Security Scenario.

As there is currently no online integration between RV and SCS, there was always a need to utilize business role task guides in RV in an easier and better way in designing and creating security roles in SCS. This feature helps in fulfilling that objective in an offline mode. Exported task guides sorted out by roles are stored in the Share Workspace. This will be very useful as a component of Offline-Integration till we have the Real-time integration with SCS.

- This should take care of both the modeling where customer is using Flow-Activity way of modeling.
- Or the Scenario" Procedure Activity" way of capturing flow variations.

The file format can be directly uploaded into SCS as a SCS Security Scenario for matching it

against the existing security objects to find out or create the best role as per the tasks performed by the user in RapidValue. This upload piece will be part of SCS Product.

- Adding capability to configure user define “Fit” Categories  
You can now define your own “Fit “ categories in addition to Gap categories to properly implement and support scenarios where process verification workshops call for additional conditions to be met before customer agrees for a RapidValue process to be a fit. This adds on to the Gap Categories capability we already have.
- Improvements in flow designer  
You can now see improved user experience while working on RapidValue flow designer form. For larger flows; now you can pin the designer tab menus at the top to make it easy navigating from top flow lane to the bottom lane in a flow with many lanes.
- Refresh preview enhancement  
You can now see improved user experience while working on RapidValue flow previews. Rather than user having to Click Refresh every time after flow changes, flow previews are now Auto-refreshed across all RV flows.
- RapidValue Task Guides improvement  
We have improved recording and playback experience within RapidValue with task recordings. There are situations when you can't create a task guide starting from the workspace. When this happens you end up with the first two steps saying 'close page'. You have to edit the recording to remove these steps. However when playing task guide back, it doesn't start from the home page and has already started at step 2. This is confusing to a user and needs to default to home page or when you start the task guide it is at the relevant step. This stands resolved in this release.
- My Process Guide enhancements  
My process Guide now includes all the users Task, Trainings and Test Runs as well. This ensures that a customer user has to just look at one place for all the daily tasks as per his responsibilities across daily operations, testing, trainings and collaboration tool like RapidValue tasks.
  
- Conditional filtering of business process hierarchy  
You can now apply a filter to business process hierarchies across different workspaces to only show the business processes that meet the defined conditions. This is extremely useful for consultants while identifying business processes based on multiple conditions. Before you can use business process hierarchy filtering for a solution, you must initialize it. You can apply a filter to the business process hierarchies on these pages: Business strategy designer, Business process designer, Scope definition, Process verification, Analyze gaps, Work package definition, Tests and Business process exercises.
- Add Work package groups and Work packages to business processes and requirements for better Task Management with RV-ADO integration  
You can now define Work package groups and Work packages to business processes and requirements in RapidValue BPM Suite and sync them with your AzureDevOps Setup. This feature helps in RV-ADO combination to offer good governance focused on business process and IT – not only IT Agile and waterfall approach – Task Management. A work package in project management is a group of related tasks within a project. Because they look like

projects themselves, they are often thought of as sub-projects within a larger project. Work packages are the smallest unit of work that a project can be broken down to when creating your Work Breakdown Structure (WBS). Tasks are typically grouped into work packages based on geographical area, engineering discipline, technology, or the time needed to accomplish them.

- Enhancements in Requirements management and Publishing  
You can now define Moscow prioritization categories (*Must have, Should have, Could have and Will not have*) and due date for better *Requirement Management* experience in RapidValue BPM Suite. Also some enhancements have been made in *Publishing* feature to provide more flexibility on what all to include in the output (*Scenarios, Status of requirements*).
  
- Directly accessing records in BPM hierarchy, activities and requirements form from any external placeholder.  
You can now reach out directly to an individual Business Process Hierarchy Record, Requirement record or an activity record subject to AAD authentication. Enhancement that helps customers adopt RV better for KM/Learning/Project Implementation perennially.
  
- Adding Categories to Business Processes , Publishing to LCS based on process and scenarios categories and also setting multiple remote connections and remote task recordings based upon the categories  
You can now add categories to RapidValue Business Processes and scenarios. This helps partners and customers to create multiple task guides for a business process based upon the end use i.e. Help, Documentation, RSAT, UAT, Security, Training etc. Next, you can also publish the Rapid Value business processes across to LCS based on the selected categories. Further to this based on the recorded scenario category type able to task record in multiple environments i.e. UAT; RSAT; SAT; Help; Training; Security etc. This enhance the RapidValue support for MS RSAT tool as using different categories for the BPM Libraries getting created when publishing from RapidValue to LCS.
  
- Enterprise Learning Management feature  
In its Preview release currently, an enterprise “Training and Learning Management” feature has been introduced in RapidValue BPM Suite. This feature offers a lifetime value proposition that is attractive for both the partners and customers. It start before the engagement and lasts perennially. This helps customer to take more ownership of the engagement. Customer has access to the best practice documentation earlier along with interactive training lessons, exercises and task guides. The key benefits are as follows:-
  - Ensure customers track lead takes ownership in each area early
  - Customers knowledge about D365FOE is raised early in the project
  - Ensure qualified questions in Analysis and Design phase because the customer has seen the processes before and executed the task guides related to them.

Self-assessment feature by end users ensures better customer enablement and adoption. You can organize Learning content in one location and provide structured access to Learning materials. This helps both partners and customers to reduce Learning and enablement time, costs and help easily tracks learner progress and performance.

- **Important Note:**
- **For June Month end preview release 10.0.1.5, 2019 there have been some data model changes so users might encounter errors while installing if they have already trainee information in the training management feature. It will be better to delete the existing trainees and define again as a resolution.**
  
- Enhancement to RapidValue BPM Suite and Azure DevOps integration  
During the synchronization process to Azure DevOps, milestone defined for a business

process in RapidValue can now be synchronized along with other fields. This enables the user to view Milestone for a work item inside Azure DevOps.

- Requirement type and Gap type Enum extended with more options  
A new value “Integration” is added to the enum “Requirement type” and four new values” BI, External documents, Integration and Security Roles.
- Feedback feature  
A feedback feature is a common and powerful tool when designing a BPM system. Feedback on various BPM elements in RapidValue BPM Suite enable the creator of the feedback to reach out to the business process owners who can then review and act upon it if required. This enables the system to improve its quality of content and ensures a continuously improving organization in place. Both creator of the feedback and current owner of the business processes can view the progress.
- Seamless solution data exchange using content packages  
You can now import a configuration from a content package. A content package consists of configuration data that is stored in RapidValue tables in XML format. For each record in a configuration, a line exists in the content package. You can import a content package from and into any Microsoft Dynamics 365 for Finance and Operations environment with RapidValue installed by setting up web service connections between the two machines.
- Search and feedback capability on the Published Website  
You can now do both a title search and a full text search on the published website. In addition you can provide feedback to the process owner from the published website as well.
- Improved handling for. axtr format Task recordings  
You can now upload task recording of file type “. axtr” to RapidValue Activities and Test Cases.

## 2.10 Adding capability to reuse Organizational elements from Standard modules when defining various data elements in Rapid Value BPM Suite

Adding capability to reuse Organizational elements from Standard modules when defining various data elements in Rapid Value BPM Suite. You can now choose to reuse the following elements from Standard modules while defining the following Rapid Value components.

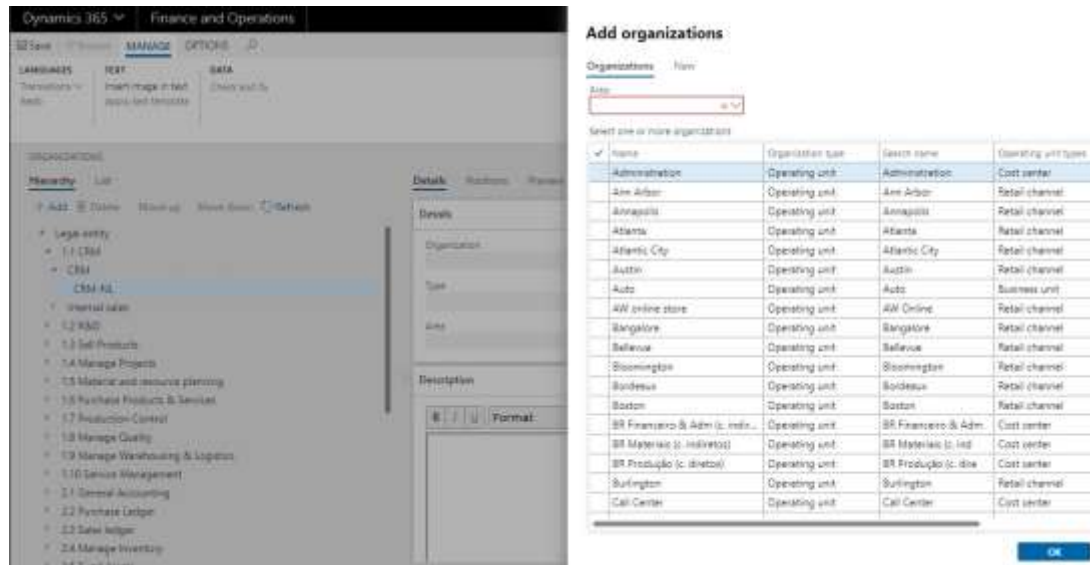
- Legal entities, Operating units, Departments, Teams,
- Positions,
- Persons,
- Skills,
- Roles and
- Trainees

This makes it EASIER for the customers who are using Rapid Value to align these elements with the corresponding D365FSC elements already defined. This will help in saving much work for the

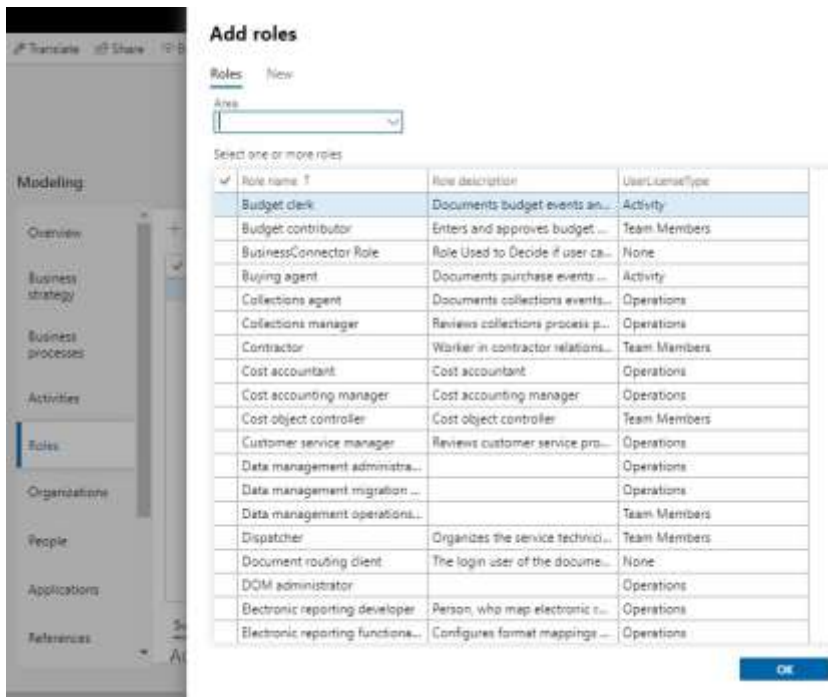
customer to maintain both in D365FSC and RV data model separately.

You will find a new “Add button” as an additional Option while defining the above elements in RapidValue. This ensures better sync with the related elements already defined in Security Configuration, Organization administration or Human Resources modules. You will still retain the flexibility to define standalone BPM components as previously. Figures below illustrate the enhancements:

### Add RV Organizations:



### Add RV Roles based on Security Configuration Security roles already defined:



**Add RV Positions based on HR Positions already defined:**



**Add RV Skills based on HR Skills already defined:**



**Add RV Trainees based on HR Trainees (Course Attendees) already defined:**

## Add trainees

Users   Persons   Course attendees   New

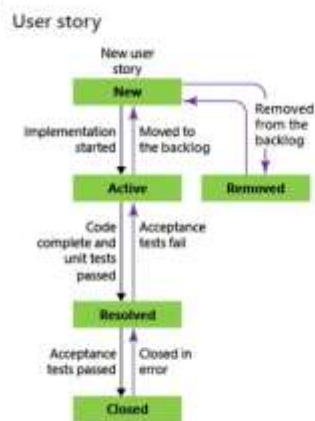
Select one or more course attendees to add them as trainees

Person	Course
<input checked="" type="checkbox"/> David Ahs	Sales techniques
<input type="checkbox"/> Michael Redmond	Sales techniques
<input type="checkbox"/> Kim Akers	Sales techniques
<input type="checkbox"/> David Simpson	Sales techniques
<input type="checkbox"/> Eran Harel	Sales techniques
<input type="checkbox"/> Sanjay Patel	Sales techniques
<input type="checkbox"/> Lon Penor	Sales techniques
<input type="checkbox"/> Luis Alverca	Health and Safety
<input type="checkbox"/> Christina Portra	Health and Safety
<input type="checkbox"/> Dana Birkby	Health and Safety
<input type="checkbox"/> Dan Jump	Health and Safety
<input type="checkbox"/> Jimmy Bischoff	Health and Safety
<input type="checkbox"/> Chloe Brussard	Health and Safety
<input type="checkbox"/> Dennis Saylor	Health and Safety
<input type="checkbox"/> Grant Culbertson	Health and Safety

## 2.11 Adding capability to configure new static statuses for Requirements for better Task Management with RapidValue-Azure DevOps integration

You can now choose to enable a system parameter in RV to get many more statuses on RV Requirements. This helps customers to better manage the workflow on the RV-ADO integration when working with Requirement Status (in RV) and Work item status (in ADO).

Azure DevOps

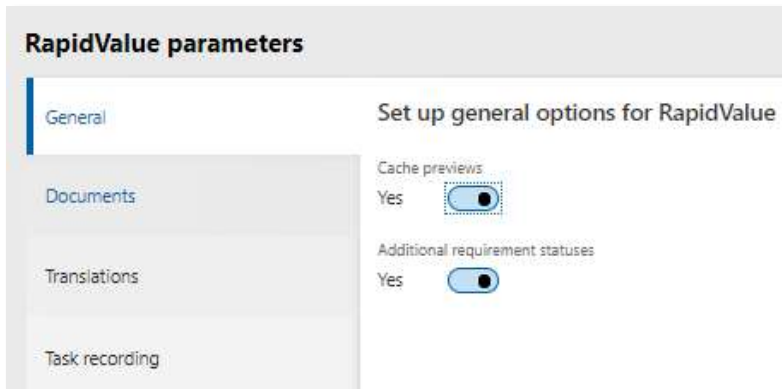


RapidValue:

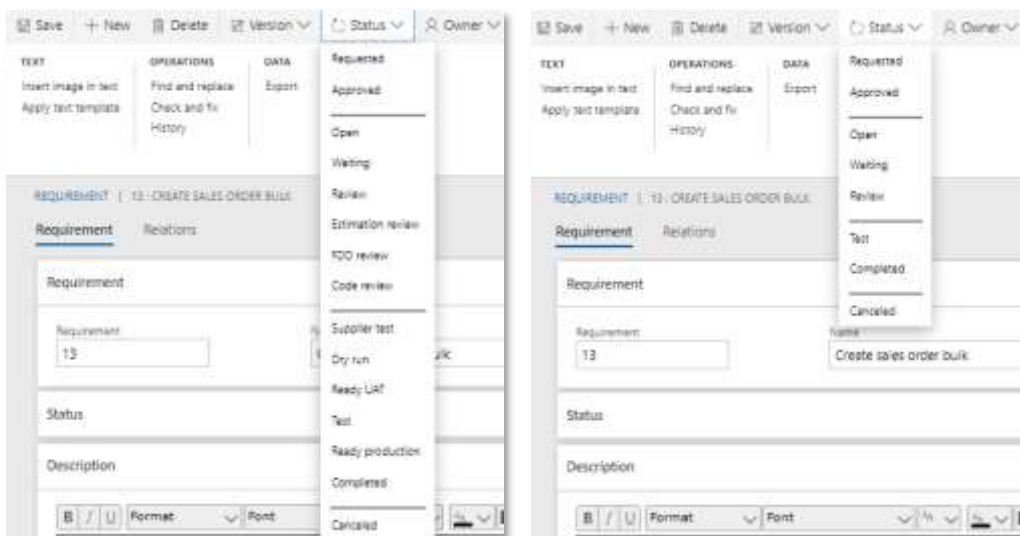
Requested
Approved
Open
Waiting
Review
Test
Completed
Canceled

Azure DevOps	RapidValue		
(prior to sync)	Requested	+	Review
New	Requested	+	*EST. REVIEW
Active	Open	+	*FDD REVIEW
*Developing	Approved	+	*CODE REVIEW
Resolved	Waiting		
*In Test	*Supplier Test		
*Client Test	*Dry Run		
*Ready UAT	*Ready UAT		
*In UAT	Test		
*Ready PROD	*Ready PROD		
Closed	Completed		

Enabling extra Requirement statuses in RV Parameters form:



Extra Requirement statuses visible below for mapping in RV Requirements form, on the right is normal Requirements statuses on the same requirements if parameter is disabled:

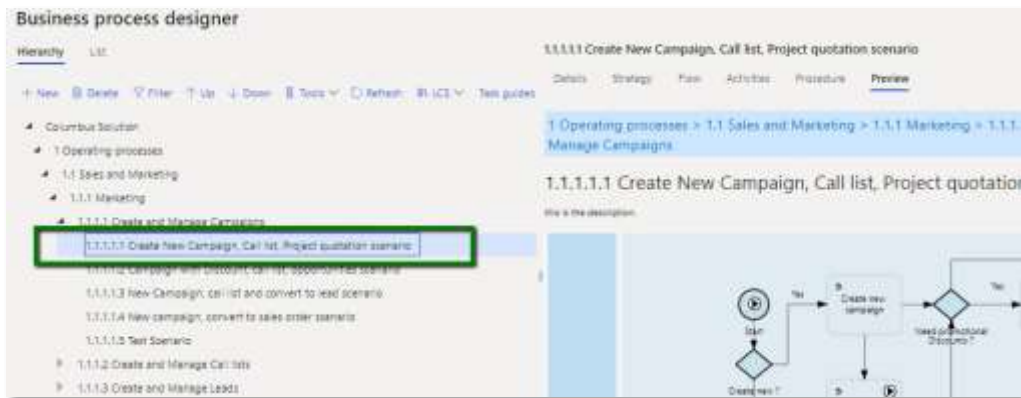


## 2.12 Adding capability to append reference numbers as well along with the business Process names in the title filed in Azure DevOps.

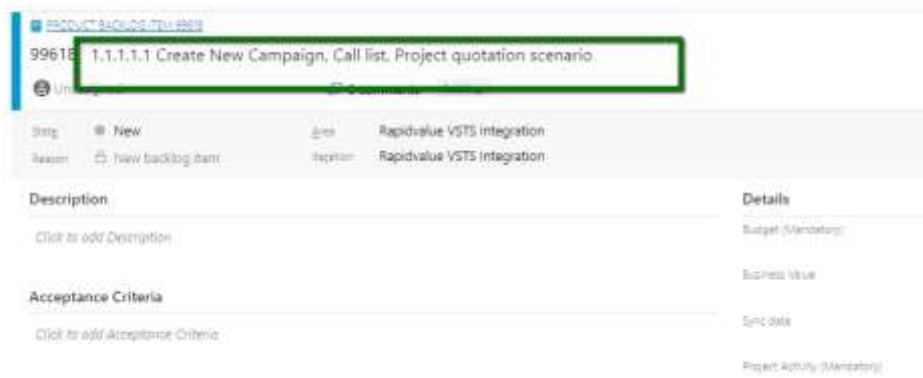
You can now choose to get the Reference numbers appended with the Business Process Name from RV to appear in the Work Item **Title** field. This significantly enhances traceability for the users.

In Business Process Hierarchy: With Reference Numbers.





In DevOps: With Reference Number added to process name in the Work Item Title field.



## 2.13 Ability to export RapidValue flow activity Task guides or Scenario Procedure activity Task Guides to be consumed by Security & Compliance Studio as a Security Scenario.

As there is currently no online integration between RV and SCS, there was always a need to utilize business role task guides in RV in an easier and better way in designing and creating security roles in SCS. This feature helps in fulfilling that objective in an offline mode. Exported task guides sorted out by roles are stored in the Share Workspace. This will be very useful as a component of Offline-Integration till we have the Real-time integration with SCS.

- This should take care of both the modeling where customer is using Flow-Activity way of modeling.
- Or the Scenario" Procedure Activity" way of capturing flow variations.

The file format can be directly uploaded into SCS as a SCS Security Scenario for matching it against the existing security objects to find out or create the best role as per the tasks performed by the user in RapidValue.

New button to export task guides for selected node or the whole solution:

**Business process designer**

Hierarchy List

+ New Delete Filter Up Down Tools Refresh LCS Task guides Details Strategy Flow Activities Procedure Preview

Refresh preview

1.0 Operating processes > 1.2 Manage Product & Services Master data >

**Define Co/By Products Scenario**

The Production Manager defines an item's Formula consisting of formula lines that identify the components to alternate Formulas. Each Formula line minimally identifies a component, a required quantity, and the warehouse source of the component.

**Process engineer**

**Production manager**

- Columbus Solution
  - 1.0 Operating processes
    - 1.1 Sales and Marketing
      - 1.1.1 Marketing
      - 1.1.2 Sales and Marketing reports
    - 1.2 Manage Product and Services Master data
      - 1.2.1 Manage Engineering
        - 1.2.1.1 Create Bom
        - 1.2.1.2 Create Formula
          - VS3.2.5 Create Formula Scenario
          - Define Co or By Products Scenario**
        - 1.2.1.3 Create Route
        - 1.2.1.4 Product Change Case
        - 1.2.1.5 Process a case
        - 1.2.1.6 Create Production Resources
      - 1.2.2 Manage Item Data
    - 1.3 Sell Products
    - 1.4 Manage Projects
    - 1.5 Material and Resource Planning
    - 1.6 Purchase Products and Services
    - 1.7 Production Control

Exported guides in the Share Workspace:

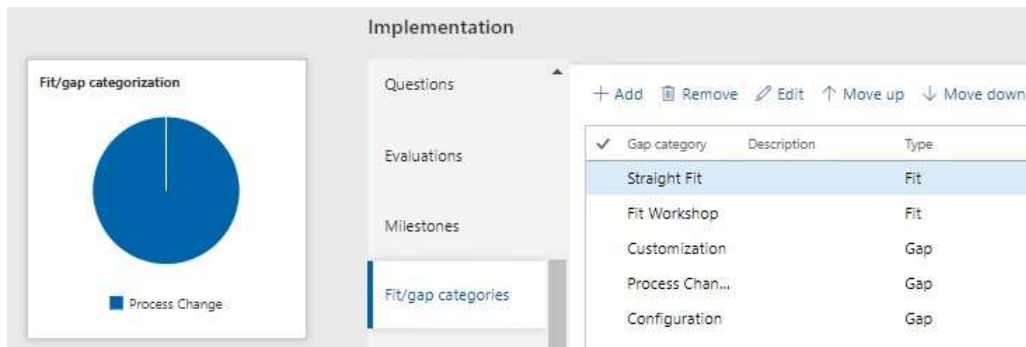
Documents	Define Co or By Products Scenario.zip	Task recording	1.10 KB	4/28/2020 12:15:38 PM
	<a href="#">Define Co or By Products Scenario.zip</a>	Task recording	1.90 KB	4/28/2020 11:39:09 AM
Images	Define Co or By Products Scenario.zip	Task recording	1.90 KB	4/28/2020 09:42:24 AM
	Define Customer Scenario.zip	Task recording	1.70 KB	4/28/2020 08:52:04 AM
	General Accounting.zip	Task recording	22.00 B	4/26/2020 06:06:19 AM
Task recording	Define Co or By Products Scenario.zip	Task recording	1.90 KB	4/23/2020 08:16:42 AM

On extracting the file role wise task guides as shown below:

Name	Date modified	Type
<b>Process engineer</b>	23-04-2020 15:36	File folder
<b>Production manager</b>	23-04-2020 15:36	File folder

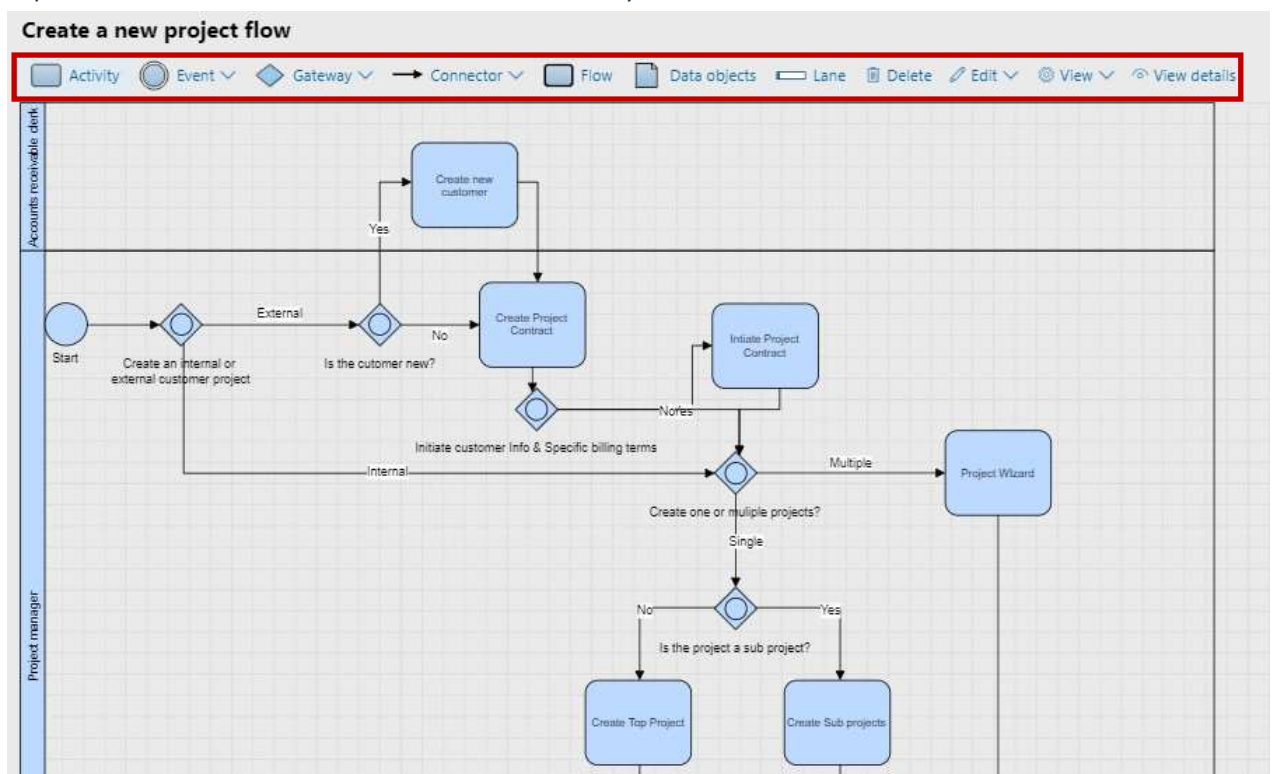
## 2.14 Adding capability to configure user define “Fit” Categories

You can now define your own “Fit “ categories in addition to Gap categories to properly implement and support scenarios where process verification workshops call for additional conditions to be met before customer agrees for a RapidValue process to be a fit. This adds on to the Gap Categories capability we already have.



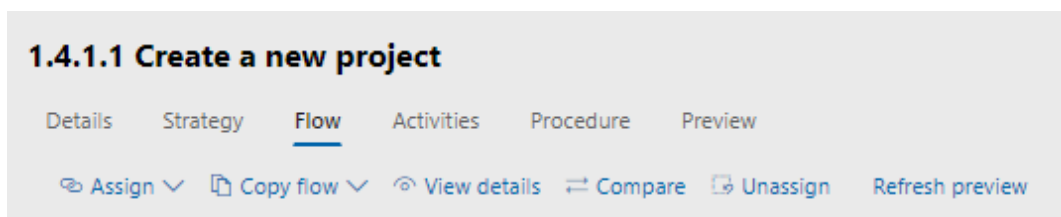
## 2.15 Improvements in flow designer

You can now see improved user experience while working on RapidValue flow designer form. For larger flows; now you can pin the designer tab menus at the top to make it easy navigating from top flow lane to the bottom lane in a flow with many lanes.



## 2.16 Enhancement of “Refresh Preview”

You can now see improved user experience while working on RapidValue flow previews. Rather than user having to Click Refresh every time after flow changes, flow previews are now Auto-refreshed across all RV flows.



## 2.17 RapidValue Task Guides improvement

We have improved recording and playback experience within RapidValue with task recordings. There are situations when you can't create a task guide starting from the workspace. When this happens you end up with the first two steps saying 'close page'. You have to edit the recording to remove these steps. However when playing task guide back, it doesn't start from the home page and has already started at step 2. This is confusing to a user and needs to default to home page or when you start the task guide it is at the relevant step. This issue stands resolved in this release with unwanted steps in the beginning being auto deleted.

## 2.18 Enhancement of My Process Guide workspace

My process Guide now includes all the users Task, Trainings and Test Runs as well in addition to all previous information. This ensures that a customer user has to just look at one place for all the daily tasks as per his responsibilities across daily operations, testing, trainings and collaboration tool like RapidValue tasks.

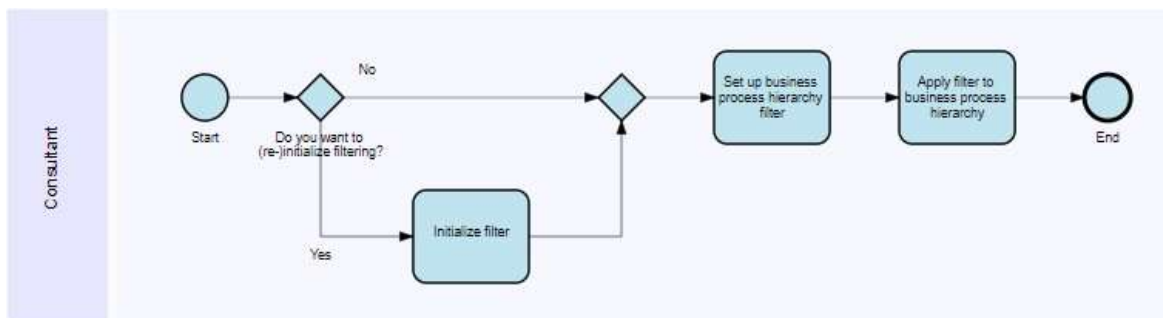
The screenshot displays the 'My process guide' workspace for Jason, a Retail sales associate. The interface is divided into several sections:

- Summary:** Includes a profile picture, 'My roles' (1), 'My tasks' (1), 'My process guide' (13), 'My activities' (33), and 'My defects' (0).
- My test runs by status:** A section for test runs, currently empty.
- My feedback:** A section for feedback, currently empty.
- My test runs:** A section for test runs, currently empty.
- My tasks:** A section for tasks, currently empty.
- My training:** A section for training, currently empty.
- All business processes:** A section for all business processes.
- Task List:** A table listing tasks with columns for 'Activity ID', 'Version', 'Type', and 'Area'.

Activity ID	Version	Type	Area
Acquire RMA	1.0	Task	Inventory Management
Apply 8 collect loyalty points	1.0	Task	Retail POS Sales
Check if customer exists	1.0	Task	Retail POS Sales
Count arrival items	1.0	Task	Inventory Management
Create customer	1.0	Application	Retail POS Sales
Download counting journal to HL	1.0	Application	Retail POS Sales
- Task Detail:** A detailed view of the 'Acquire RMA' task, including a 'Standard procedure' section with steps: 1. Click General journal processing, 2. Click the All not posted tab.

## 2.19 Conditional filtering of business process hierarchy

You can now apply a filter to business process hierarchies across different workspaces to only show the business processes that meet the defined conditions. This is extremely useful for consultants while identifying business processes based on multiple conditions. You can apply a filter to business process hierarchies to only show the business processes that meet the defined conditions.



You can apply a filter to the business process hierarchies on these pages:

- Business strategy designer
- Business process designer

- Scope definition
- Process verification
- Analyze gaps
- Work package definition
- Tests
- Business process exercises

If filtered, a business process hierarchy shows:

- The business processes that meet the filter conditions.
- Their parent business processes, all the way up to the top node in the business process hierarchy. So, also the parent business processes that do not meet the filter conditions are shown.

Defining and applying filters in RapidValue Workspaces:

The image contains three screenshots illustrating the process of defining and applying filters in RapidValue Workspaces.

**Top Screenshot: Filter Definition**  
 This screenshot shows a 'FILTER | NEW RECORD' dialog box with the 'Conditions' tab selected. A table lists various business areas and their solutions. The 'Area' field is selected in the 'Add condition' dropdown.

Area	Solution	Status	Owner
Equipment Management	DYNARENT Solution	Open	
Service and Maintenance	DYNARENT Solution	Open	
Dynarent configuration	DYNARENT Solution	Open	
Rental Management	DYNARENT Solution	Open	
Lease Management	DYNARENT Solution	Open	
Transport Management	DYNARENT Solution	Open	
Administration	DYNARENT Solution	Open	

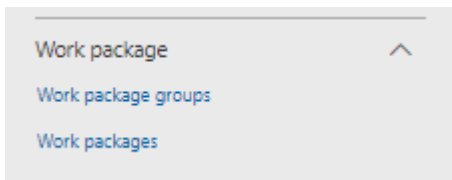
**Middle Screenshot: Scope Definition**  
 This screenshot shows the 'Scope definition' interface in Dynamics 365. The 'Hierarchy' tab is active, showing a tree view of business processes. The 'Active filter' is set to 'AreaFilter'. The hierarchy includes 'Dynarent Rental Management (In scope)' and 'Rental Order Management (In scope)'. Under 'Rental Order Management', several sub-processes are listed, some marked as 'Out of scope'.

**Bottom Screenshot: Apply Filter**  
 This screenshot shows the 'Apply filter to business process hierarchy' dialog box. The 'Filter' dropdown is set to 'AreaFilter'. The 'Conditions' section shows a list of conditions: '1. Area' and '2. Scoping'. The 'OK' button is highlighted.

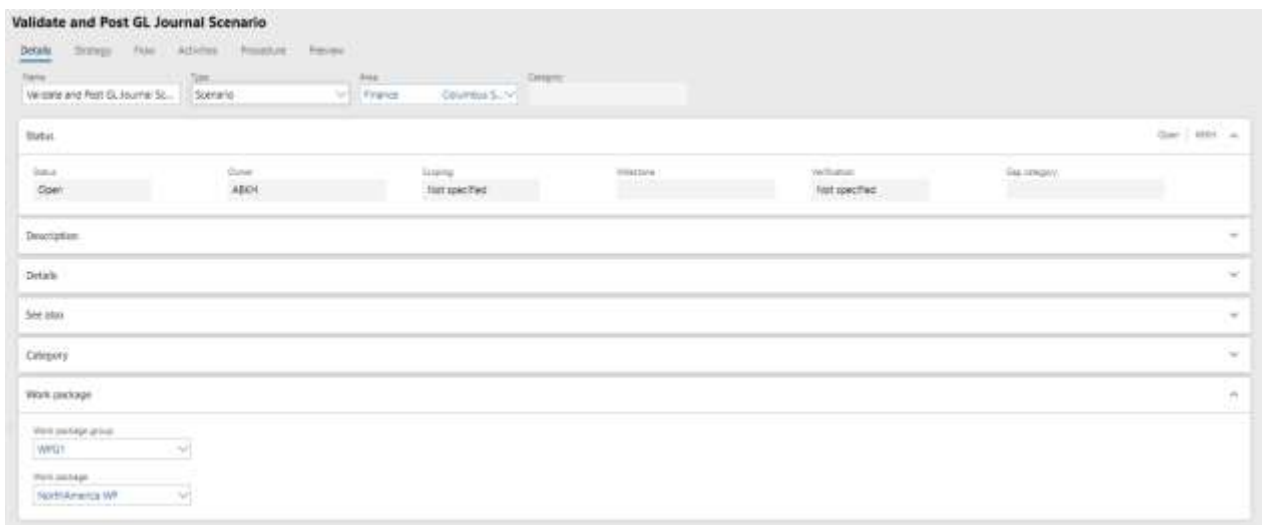
## 2.20 Add Work package groups and Work packages to business processes and requirements for better project and task management with RV-ADO integration

You can now define Work package groups and Work packages to business processes and requirements in RapidValue BPM Suite and sync them with your Azure DevOps Setup. This feature helps in RV-ADO combination to offer good governance focused on business process and IT – not only IT Agile and waterfall approach – Task Management. A work package in project management is a group of related tasks within a project. Because they look like projects themselves, they are often thought of as sub-projects within a larger project. Work packages are the smallest unit of work that a project can be broken down to when creating your Work Breakdown Structure (WBS). Tasks are typically grouped into work packages based on geographical area, engineering discipline, technology, or the time needed to accomplish them.

Defining Work package groups and Work packages:



Linking individual business processes to Work package groups and Work packages:



Creating Work packages at a RapidValue Solution level:

**Implementation**

Requirements **★ Define work package** Publish Browse Refresh preview

Scope definition

Process verification

Analyze gaps

Questions

Evaluations

Milestones

Gap categories

**Work packages**

My tasks

My feedback

Charts

**Hierarchy List**

- 1.0 Operating processes
  - 1.1 Sales and Marketing (WP1)**
    - 1.2 Manage Product & Services Master data
    - 1.3 Sell Products
    - 1.4 Manage Projects (WP2)
    - 1.5 Material and Resource Planning
    - 1.6 Purchase Products & Services
    - 1.7 Production Control
    - 1.8 Manage Quality
    - 1.9 Manage Warehousing & Logistics
    - 1.10 Service Management
  - 2.0 Finance & Supporting Processes
    - 10.0 Retail - Operating Processes
    - 20.0 Retail - Finance & Supporting Processes

**1.0 Operating processes** Up Next

**1.1 Sales and Marketing**

**1.1.1 Marketing**

- 1.1.1.1 Create and Manage Campaigns
- 1.1.1.2 Create and Manage Call lists
- 1.1.1.3 Create and Manage Leads
- 1.1.1.4 Create and Manage Prospects
- 1.1.1.5 Create and Manage Contacts
- 1.1.1.6 Create and Manage Opportunities
- 1.1.1.7 Create an Manage Activities

**1.1.2 Sales and Marketing reports**

This phase is not yet scoped, not yet categorized as fit or gap.  
 Last modified by Admin at 12/30/2019 02:18:28 pm.  
 View generated: 12/31/2019 05:16:46 am. Click Refresh preview to update the view.

**Assign work package**

Select a work package and click OK to assign the process to it.

**Work package definition**

**Hierarchy List**

**★ Assign work package**

Work package Work package group

✓	Work package	Description
	WP1	Work package for integration wi...
	WP2	

Using Work package definitions for RV<-> ADO Integration:

**MAPPING**

**RV <-> DevOps mapping : RV-DevOps connection for RV-DevOps e**

Details Connection **Mapping**

Entities

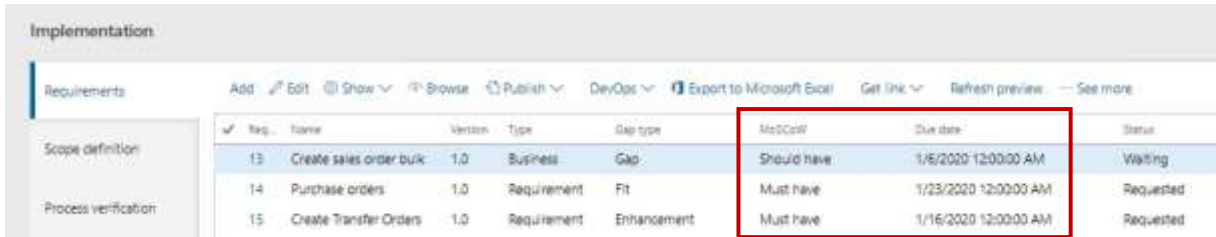
+ Add Remove Move up Move down Set default parent Validate

✓	Rapivalue table name	Rapivalue field name	Rapivalue value	Work item type	Default parent
✓	Business process				
	Business process	TestSuitesNotFinished	Group	Epic	
	Business process	TestSuitesPassed	Process	Feature	
	Requirement	TestSuitesSkipped	MustHave	Product Backlog item	
	Type				
	Verification				
	WorkPackage				
	WorkPackageGroup				

## 2.21 Enhancements in Requirements Management and Publishing

You can now define Moscow prioritization categories (Must have, Should have, Could have and Will not have) and due date for better Requirement Management experience in RapidValue BPM Suite. Also some enhancements have been made in Publishing feature to provide more flexibility on what all to include in the output (Scenarios, Status of requirements).

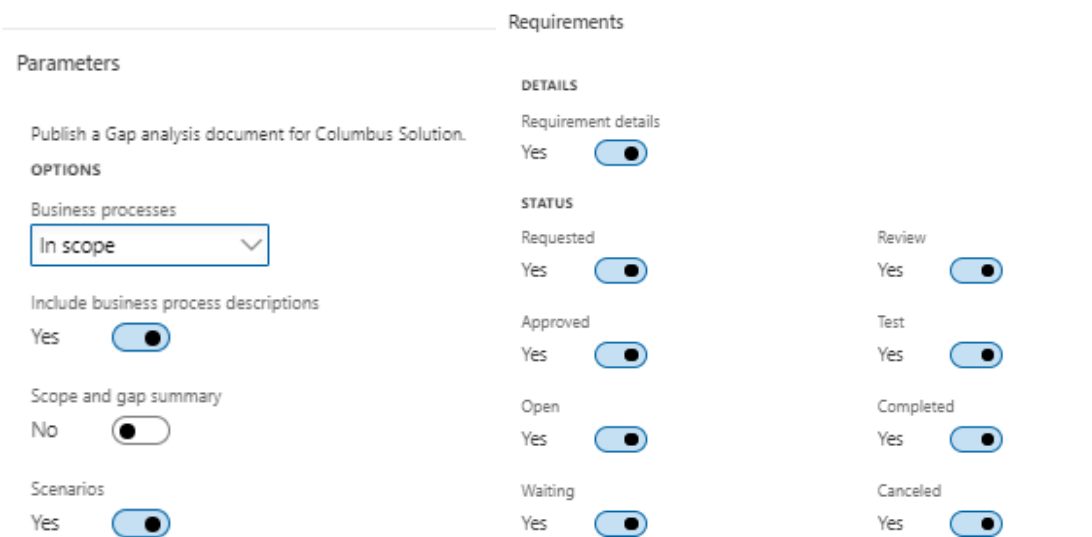
MoSCoW prioritization is an effective prioritization method to capture a broader perspective by including participants from different functional areas. Another reason incentive to use MoSCoW prioritization is it allows your team to determine how much effort goes into each category. Therefore, you can ensure that you're delivering a good variety of initiatives each release.



Req. ID	Name	Version	Type	Gap type	MoSCoW	Due date	Status
13	Create sales order bulk	1.0	Business	Gap	Should have	1/6/2020 12:00:00 AM	Waiting
14	Purchase orders	1.0	Requirement	Fit	Must have	1/23/2020 12:00:00 AM	Requested
15	Create Transfer Orders	1.0	Requirement	Enhancement	Must have	1/16/2020 12:00:00 AM	Requested

Publishing related enhancements:

### Publish Gap analysis document



**Parameters**

Publish a Gap analysis document for Columbus Solution.

**OPTIONS**

Business processes  
In scope

Include business process descriptions  
Yes

Scope and gap summary  
No

Scenarios  
Yes

**Requirements**

**DETAILS**  
Requirement details  
Yes

**STATUS**

Requested  
Yes

Approved  
Yes

Open  
Yes

Waiting  
Yes

Review  
Yes

Test  
Yes

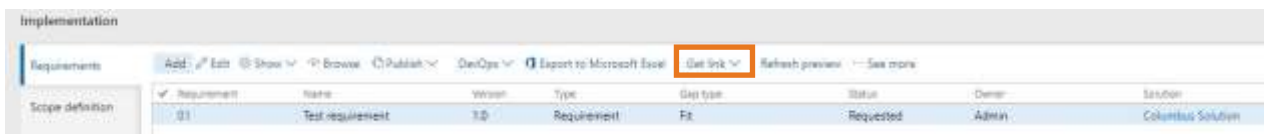
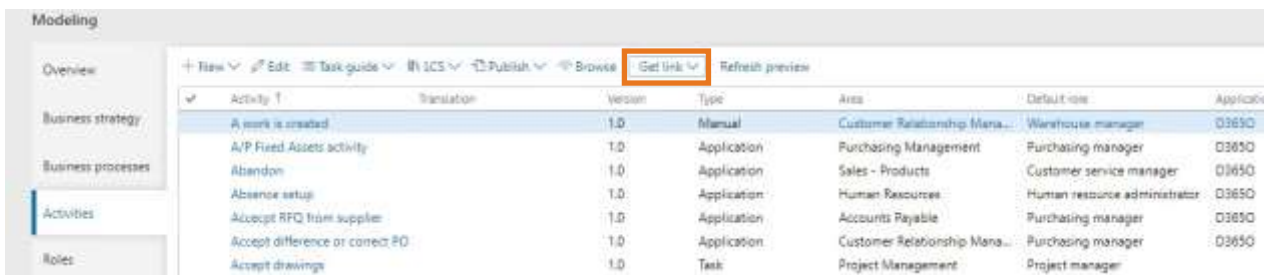
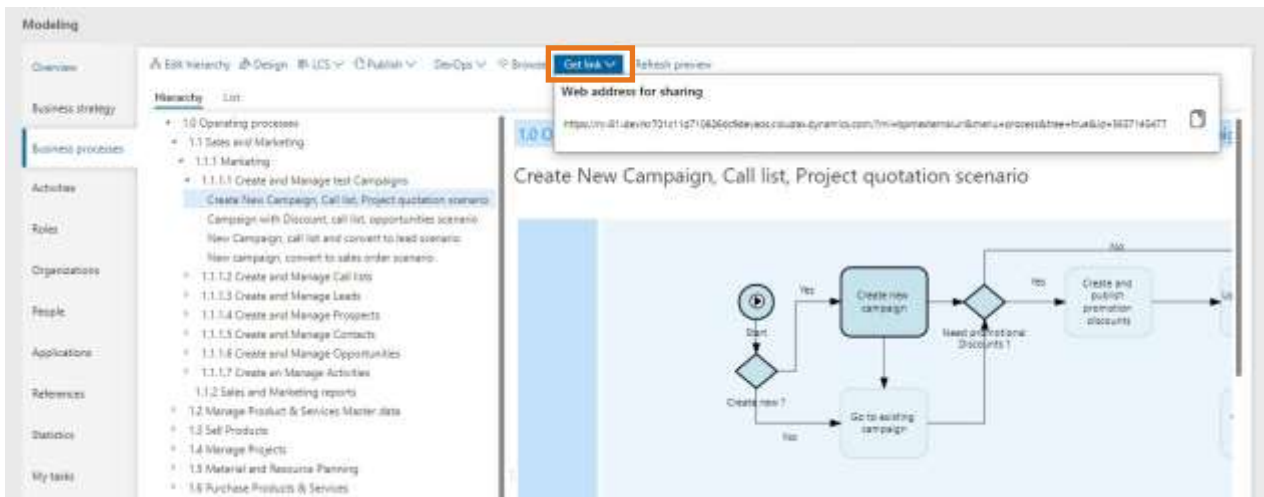
Completed  
Yes

Canceled  
Yes

## 2.22 Directly accessing records in BPM hierarchy, activities and requirements form from any external placeholder- Preview Release

You can now reach out directly to an individual Business Process Hierarchy Record, Requirement Record or an activity record subject to AAD authentication from external placeholders like SharePoint, Confluence etc.





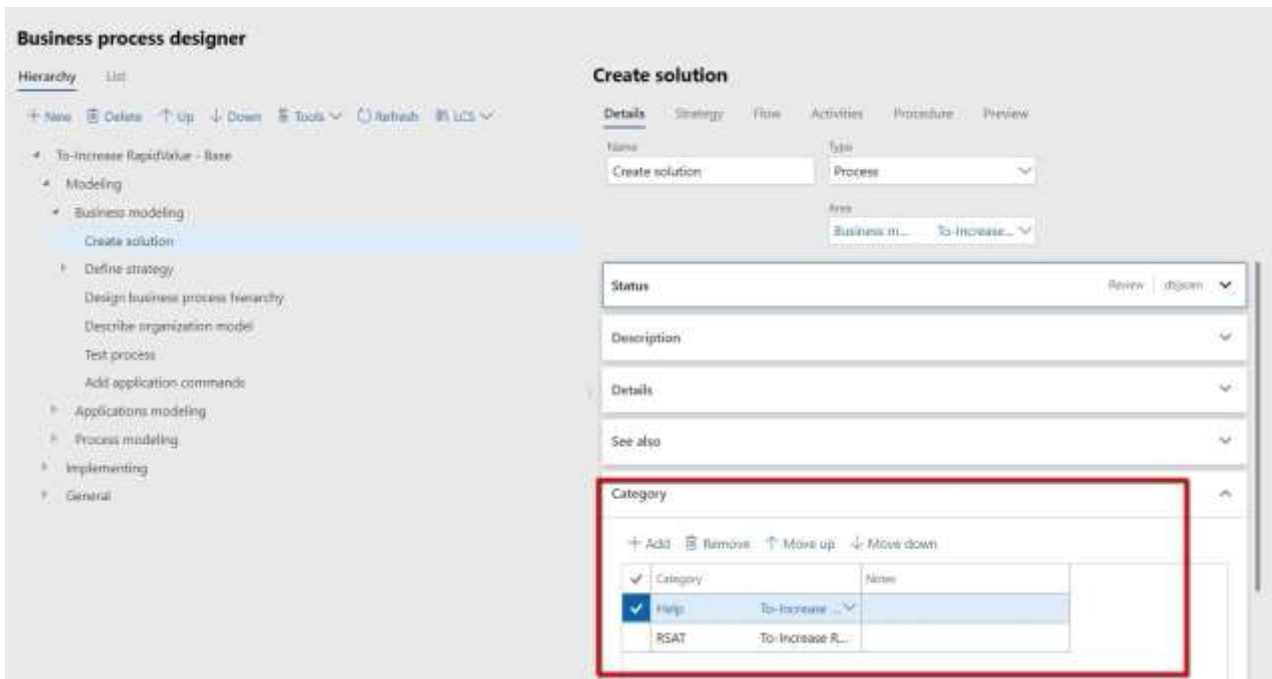
## 2.23 Adding Categories to Business Processes, Publishing to LCS based on process and scenarios categories and also setting multiple remote connections and remote task recordings based upon the categories –Preview Release

You can now add categories to RapidValue Business Processes and scenarios. This helps partners and customers to create multiple task guides for a business process based upon the end use i.e. Help, Documentation, RSAT, UAT, Security, Training etc. Next, you can also publish the Rapid Value business processes across to LCS based on the selected categories. Further to this based on the recorded scenario category type able to task record in multiple environments i.e., UAT; RSAT; SAT; Help; Training; Security etc.

This enhance the RapidValue support for MS RSAT tool as using different categories for the BPM Libraries getting created when publishing from RapidValue to LCS.

Assigning categories to Business processes and Scenarios:

Categories can be defined at a solution level either from “Modelling” or “Management” workspace.



Export processes based on Category:

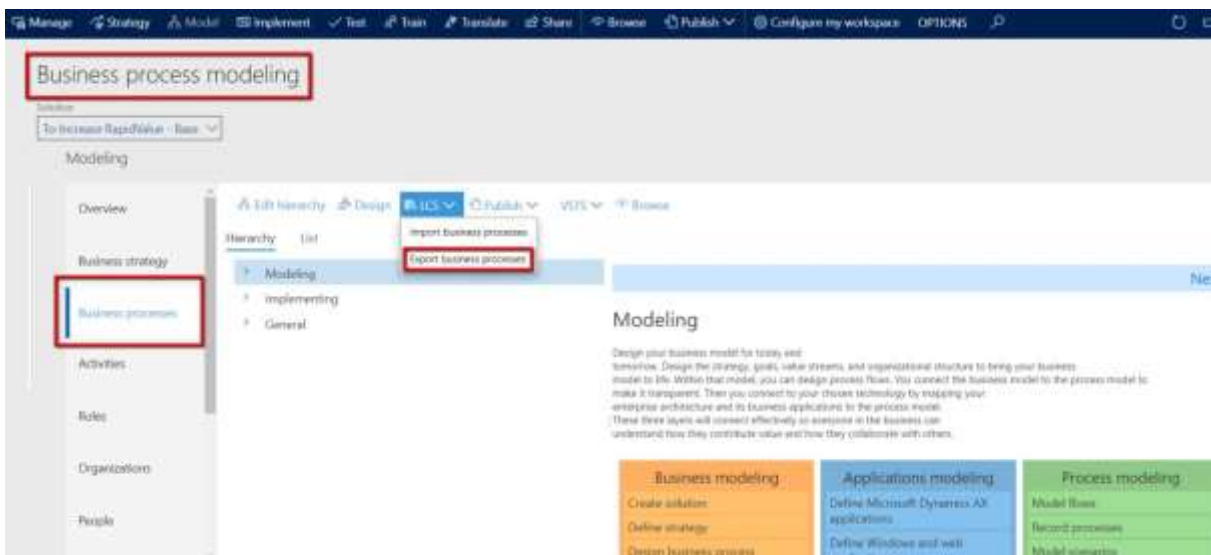
In order to enable conditional upload of business processes to LCS, RapidValue now has the ability to assign categories to business processes.

BPMCATEGORY | TO-INCREASE RAPIDVALUE - BASE : CUSTOMER

Filter

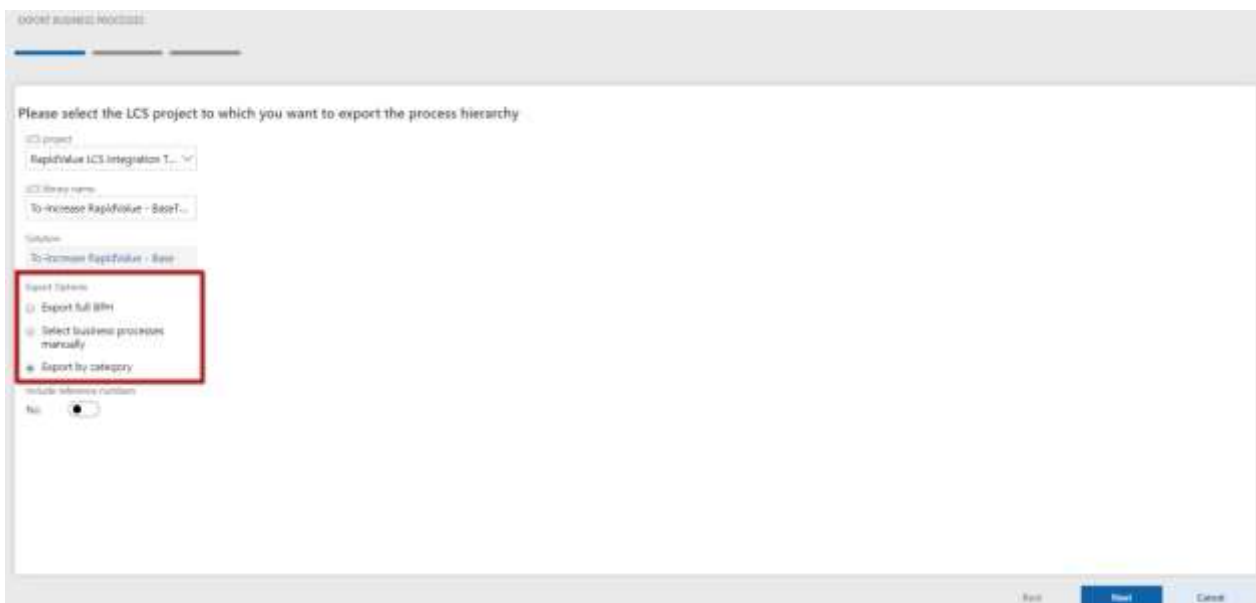
✓	Category ↑	Description	Solution
	Help		To-Increase RapidValue - Base ✓
	SCS		To-Increase RapidValue - Base
	RSAT		To-Increase RapidValue - Base

Finally, during export of business processes to LCS only those business processes that have the selected categories assigned, will be uploaded.



Export option on Business process modelling workspace

In the export processes to LCS wizard, select the option “Export by category” and click Next.



Export processes by category

In the next page of the wizard only those categories that are actually used in the process hierarchy will be displayed. Select necessary categories from the grid and click Next.

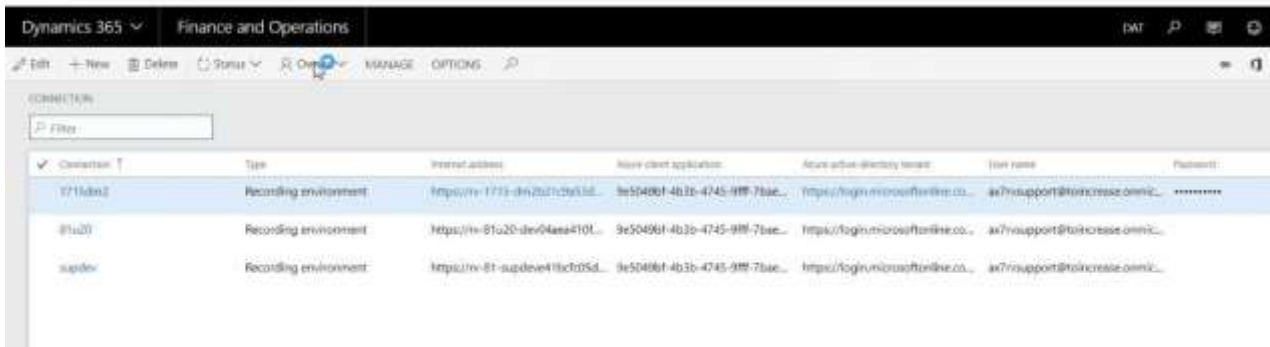
All business processes that have the selected category assigned will be exported to LCS.

Points to consider:

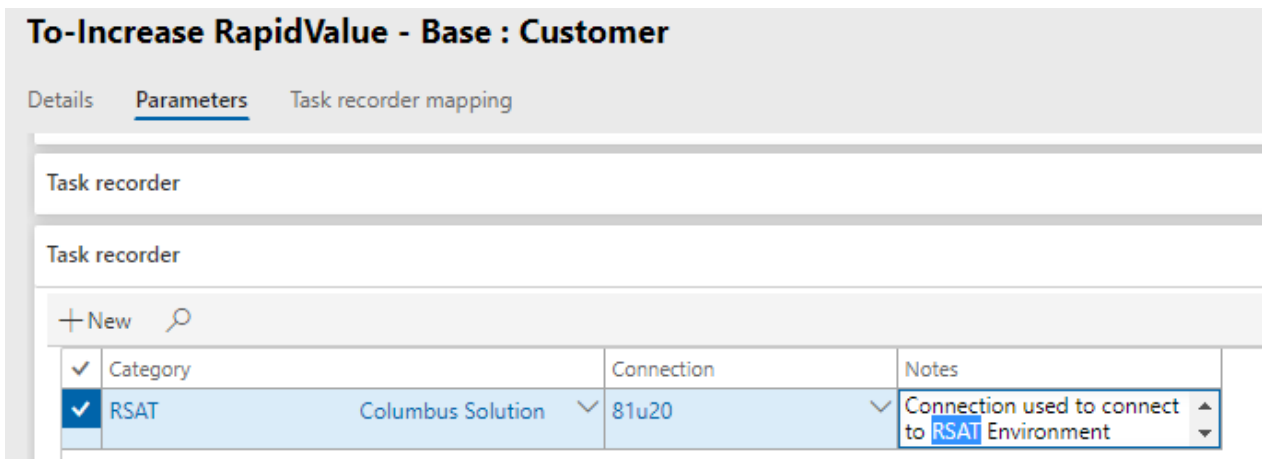
- Only those processes with the selected category assigned will be exported to LCS.
- If only a child node has the selected category assigned and not its parent, the child node along with its parent will be exported to LCS as the hierarchy need to be maintained on LCS.
- If only a parent node has the selected category assigned and none of its child nodes has the selected category assigned, only the parent record will be exported to LCS and no child record will be exported.

Setup category based remote task recording connection to an environment:

In order to enable conditional remote task recording, this enhancement has been done. This helps users to create and run multiple task guides in different environments based on the end use i.e. RSAT, UAT, Security, Training, Help etc.

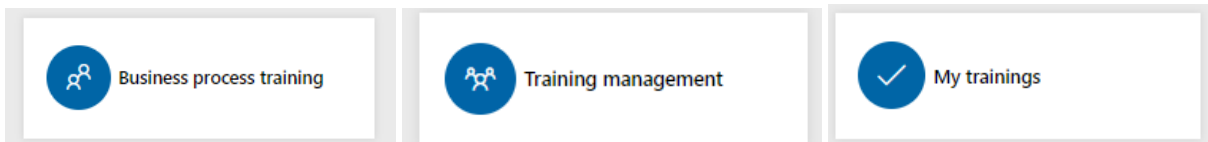


You can link different environments per category as shown below.

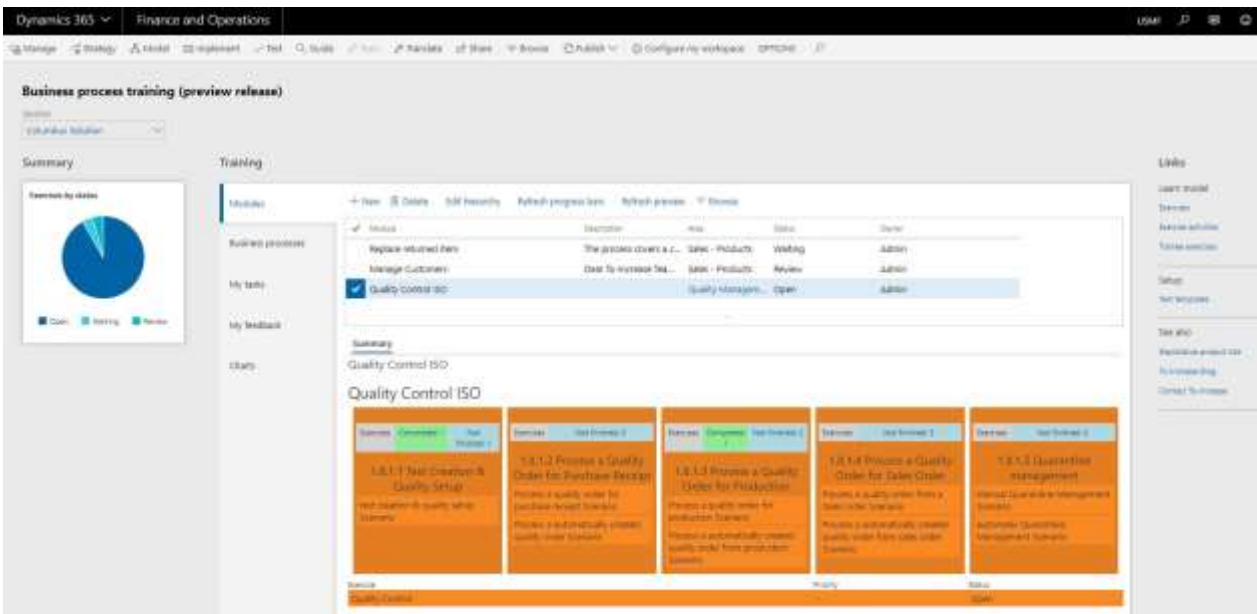


## 2.24 Enterprise Learning Management feature – Preview Release

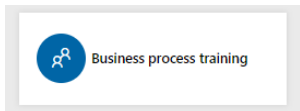
RapidValue BPM suite has all content to enable new users of D365FO – Before engagement starts, before or after go live and during roll outs. To enhance user enablement and adoption we would like to offer our partners and customers more functionality around the training content development, training administration and employee onboarding and self-learning management feature. This preview release offers new “Business Process training”, “Training Management”, and “My trainings” work spaces dedicated for this feature.



This involves creating Learning Modules, Creating Exercises, Defining Trainees and Assigning exercises to Trainee from the stand RapidValue Content. This feature also has the capability to create, planning and assign Trainees exercises to individual users for self-learning using process flows and task guides and self-assessment.

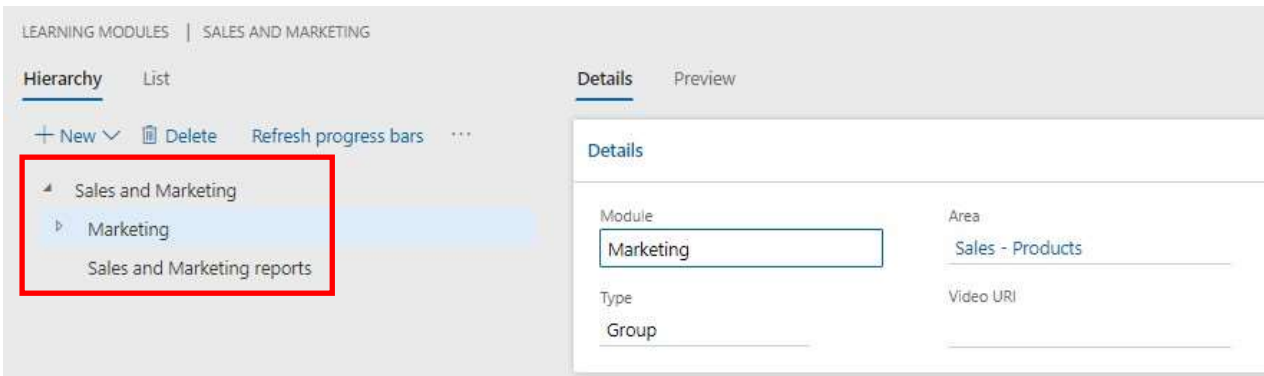


This supports both modular flow and activity based task guides as well as larger scenario based task guides to help trainees learn through the organization business processes in an interactive manner. Following Personas based use cases are listed below:



Training Content Developer:

- Create Learning modules, Groups and Lessons based on RapidValue BPM Suite Content. You can split the RapidValue content the way you wish to best suite your training needs.



- Creating Business process Exercises for the content.

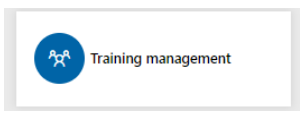
**Training**

Design **Generate module** Refresh preview

Hierarchy List

- 1.0 Operating processes (In scope)
- 2.0 Finance & Supporting Processes (In scope)
- 10.0 Retail - Operating Processes (Not specified)
- 20.0 Retail - Finance & Supporting Processes (Not specified)

**1.0 Operating processes**  
Processes can be added to the selected node



Training Manager:

- Defining Trainees form RapidValue Persons.
- Defining Training needs for individual team members.
- Assigning Learning modules and Exercises to trainees as per their learning needs.
- Monitor the module level progress.

**Business process training**

Modules

+ Add Remove Edit Refresh preview Browse

✓	Name	Person ↑	User ID	Notes
	Abhinav Khanna	Abhinav	ABKH	
	Admin	Admin	Admin	
	Alena Belianina	Alena	BELA	
	ALICIA	ALICIA	ALICIA	
	APRIL	APRIL	APRIL	
	ARNIE	ARNIE	ARNIE	
	Bhavin Malkan	Bhavin	BMAL	

**Business process training**

Modules

Edit hierarchy Remove Refresh progress bars Refresh preview Browse

✓	Module	Trainee	Self assessment	Area	Learn status	Solution
	Quality Control ISO	JOP	Not rated	Quality Management	Created	Columbus Solution
	Manage Customers	Björn	Not rated	Sales - Products	Created	Columbus Solution
	Manage Customers	Brad	Not rated	Sales - Products	Created	Columbus Solution
	Replace returned item	Admin	Not rated	Sales - Products	Created	Columbus Solution
	Manage Customers	Admin	Not rated	Sales - Products	Created	Columbus Solution

Business process training

Modules: [Filter] [Delete] [Status] [Owner] [Publish] [See more] [Refresh preview] [Edit] [Close]

Trainers	Trainer exercise	Priority	Learn date	Learn status	Owner	Scenario	Group/role
	Automatic Quarantine Management Scenario	High	6/28/2019 12:00:00 AM	Created	rsingh	Columbus Solutions	
	Create Customer	High	6/28/2019 12:00:00 AM	Created	vsingh	Columbus Solutions	

Trainer exercise: Automatic Quarantine Management Scenario

My feedback

Summary

Quality Control ISO

Quality Control ISO

Exercise	Completed	Not finished	Exercise	Completed	Not finished	Exercise	Completed	Not finished	Exercise	Completed	Not finished	Exercise	Completed	Not finished	
1.B.1.1 Test Creation & Quality Setup	1	1	1.B.1.2 Process a Quality Order for Purchase Receipt	0	3	1.B.1.3 Process a Quality Order for Production	1	2	1.B.1.4 Process a Quality Order for Sales Order	0	3	1.B.1.5 Quarantine management	0	3	
Test creation & quality setup Scenario			Process a quality order for purchase receipt Scenario Process a automatically created quality order Scenario			Process a quality order for production Scenario Process a automatically created quality order from production Scenario			Process a quality order from a sales order Scenario Process a automatically created quality order from sales order Scenario			Manual Quarantine Management Scenario Automatic Quarantine Management Scenario			
Exercise						Priority						Status			
Quality Control						-						Open			

My trainings

Trainees:

- Take the trainings in the “My Trainings” Workspace.
- Go through all the processes assigned to individual, run through the task guides (scenario based or activity based) and provide feedback to process owners if applicable.
- Self-assessment and rating.

- TEXT**
  - Insert image in text
  - Apply text template
- OPERATIONS**
  - Check and fix
  - History
- DATA**
  - Export

TRAINEE EXERCISE

### Create and Manage Campaigns - F2

Trainee exercise **Procedure** Conclusion Preview

Exercise activities

		Reset	Completed	Skip	Play	Feedback		Priority	Status	Conclusion
<input checked="" type="checkbox"/>	Exercise activity				Activity recording					
<input checked="" type="checkbox"/>	Go to existing campaign				Learn case recording			-	Created	
	Update campaign status - F2							-	Created	
	Create and perform activities - F2							-	Created	
	Create targets for campaigns - F2							-	Created	
	Convert targets to opportunities - F2							-	Created	

Columbus Solution

Modules: Edit hierarchy Remove Refresh progress bars Refresh preview Browse

Module	Trainee	Set assessment	Area	Learn status	Solution	Description
Quality Control ISO	JOP	Aware	Quality Management	Completed	Columbus Solution	
Manage Customers	Ilynn	Novice	Sales - Products	Completed	Columbus Solution	Dear To-increase Team    
Manage Customers	Brad	Intermediate	Sales - Products	Completed	Columbus Solution	Dear To-increase Team    
Replace returned item	Admin	Advanced	Sales - Products	Completed	Columbus Solution	The process covers a customer f...
Manage Customers	Admin	Expert	Sales - Products	Completed	Columbus Solution	Dear To-increase Team    

Summary

Next

### Manage Customers

**1.3.1.1 Create Customer**  
Define Customer Scenario

**1.3.1.2 Rebate - Cumulative / Bonus**  
Define rebate agreement Scenario  
Process customer rebate Scenario  
Sell item

Exercises

Exercise	Priority	Pay task Status	Got it
Manage Customers 2	-	Created	<input type="radio"/>

Quality Control ISO > 1.3.1.1 Test Desktop & Quality Setup

test creation & quality setup Scenario

Exercises

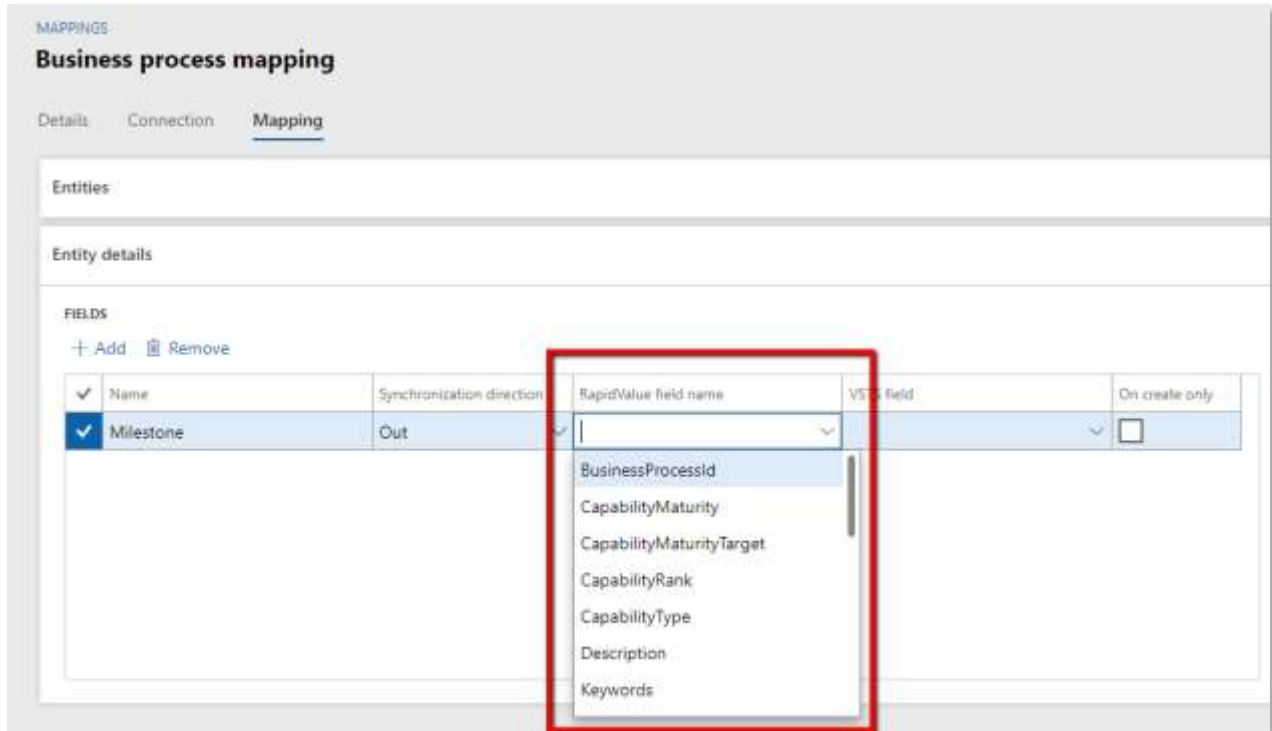
Exercise	Priority	Pay task Status	Got it
test creation & quality setup Scenario		Completed	<input checked="" type="radio"/>



## 2.25 Enhancement to RapidValue BPM Suite and Azure DevOps integration

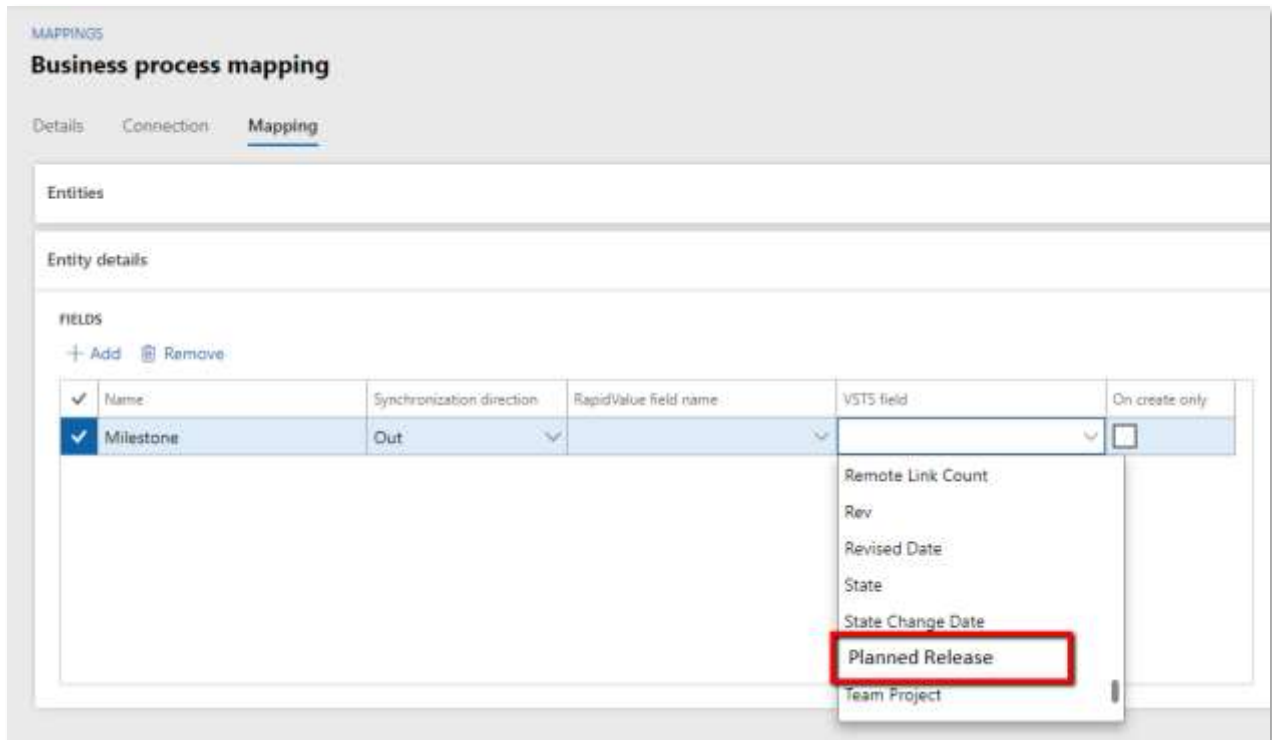
During the synchronization process to Azure DevOps, milestone defined for a business process will now be synchronized along with other fields. This enables the user to view Milestone for a work item inside Azure DevOps. "Milestone" field is mapped to a new field in Azure DevOps work item. This can be achieved by adding a new mapping for "Milestone" in the VSTS mapping form inside RapidValue.

A new value for "Milestone" is added in the "RapidValue field name" column in the "Entity details" grid of the VSTS mapping form. The user needs to add a new record in the "Entity details" grid to enable mapping of "Milestone" to VSTS.



The highlighted box shows the column where a new value for "Milestone" is added.

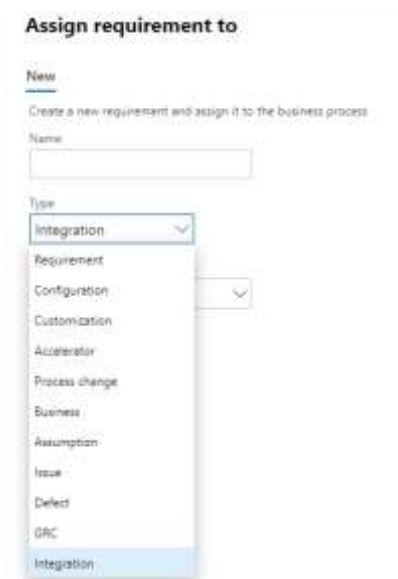
Customers can map the Milestone field to any field in VSTS which corresponds to this and suitable as per their VSTS configuration. An example is shown below:



The highlighted box shows the value “Planned Release” (an example only as individual customer configuration can differ) to which the milestone value is assigned in VSTS work item.

## 2.26 Requirement type and Gap type Enum extended with more options

A new value “Integration” is added to the enum “Requirement type” and four new values” BI, External documents, Integration and Security Roles.



## 2.27 Feedback feature

Feedback functionality enables users to provide feedback on various RapidValue elements. The provided feedback can be viewed by the owner of the record and appropriate action can be taken.

Following four different types of “Feedback” can be provided for the following RapidValue record i.e. *General*, *Like*, *Dislike* and *Idea*.

Feedback can be provided on the following forms:

- Solution , Business process, Flows, Activities, Roles, Applications, Goals, Requirements, Test runs, Test suites, Test cases, Organization and Data objects
- Providing feedback

Feedback on a record can be provided by navigating to the corresponding form. Once navigated, click on “Feedback” button to open “Feedback” form.

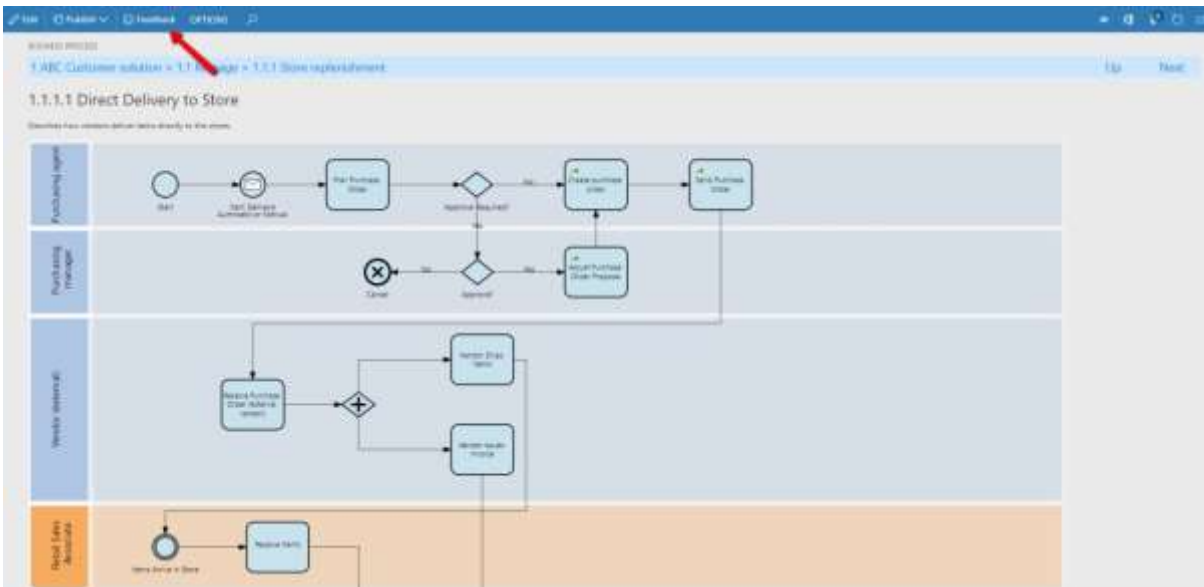


Figure-Feedback button

On the Feedback form note that the Owner of the feedback is prepopulated and is set to the owner of the record that the feedback is referring to. Select the type of feedback, provide necessary notes and click on Save button. Once the feedback is saved, the Created by field is set to the user who added the feedback.

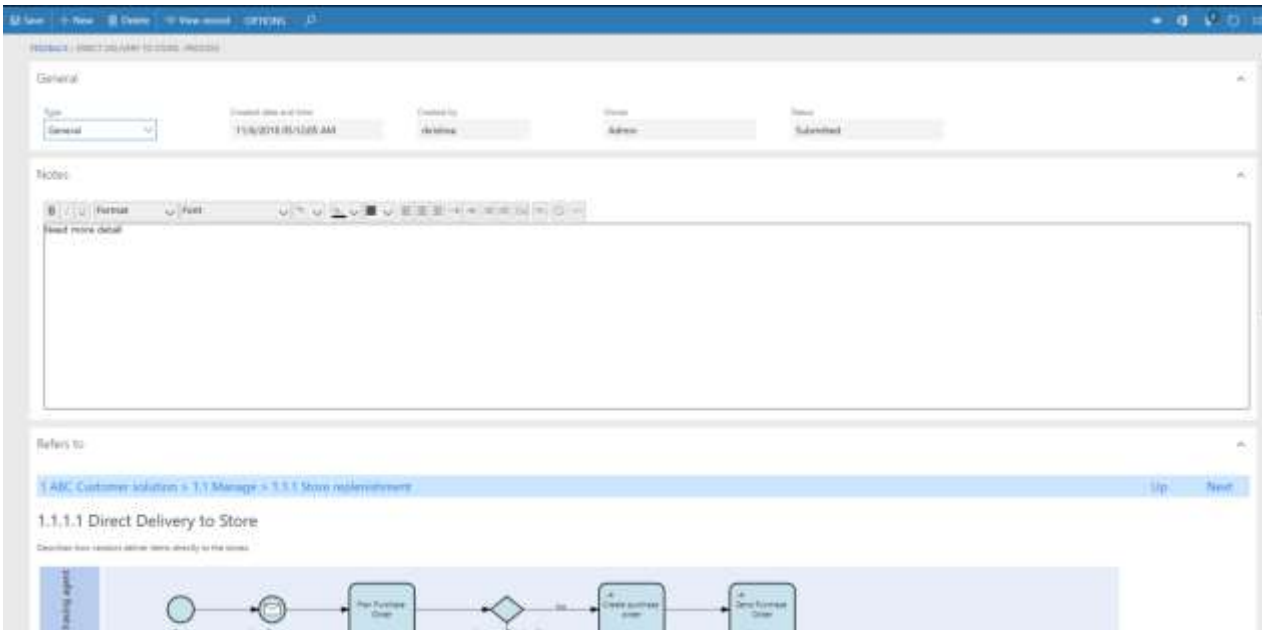


Figure - Feedback form

- Viewing Feedback of a record
  - “Feedback” fact box

All feedback for a particular record can be found in the “Feedback” factbox present on the right pane of the page. Click on the Notes link in the Feedback factbox to navigate to the detailed feedback form.

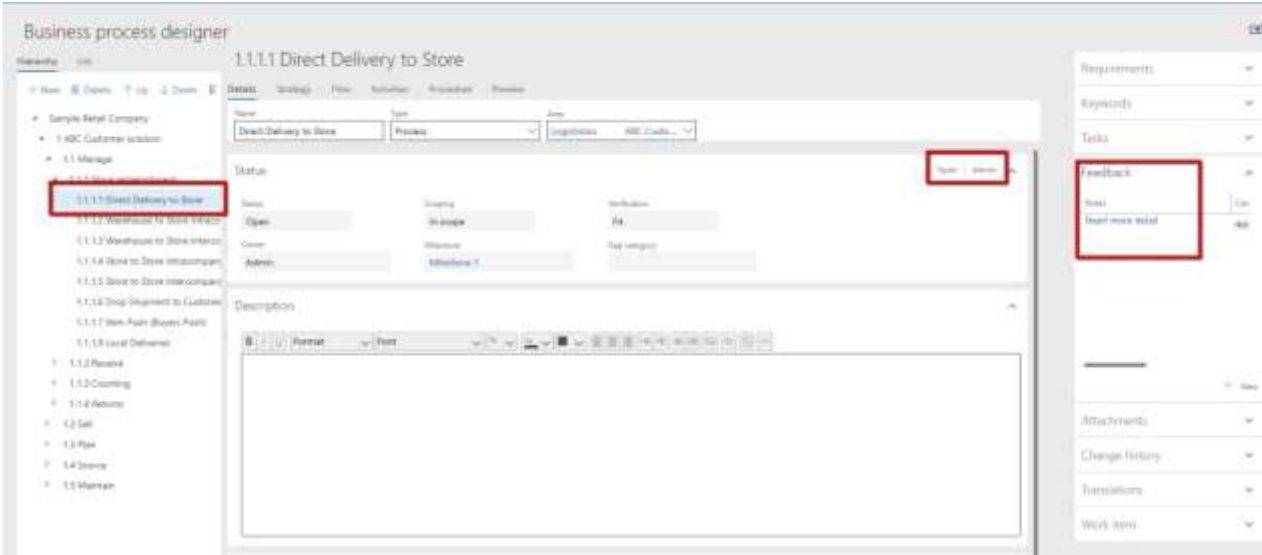


Figure-Feedback fact box

- “Feedback” tab in Business process management workspace

The “Feedback” tab in *Business process management workspace* lists all the feedback records present in the machine. Clicking on the Notes link navigates the user to the feedback detail form.

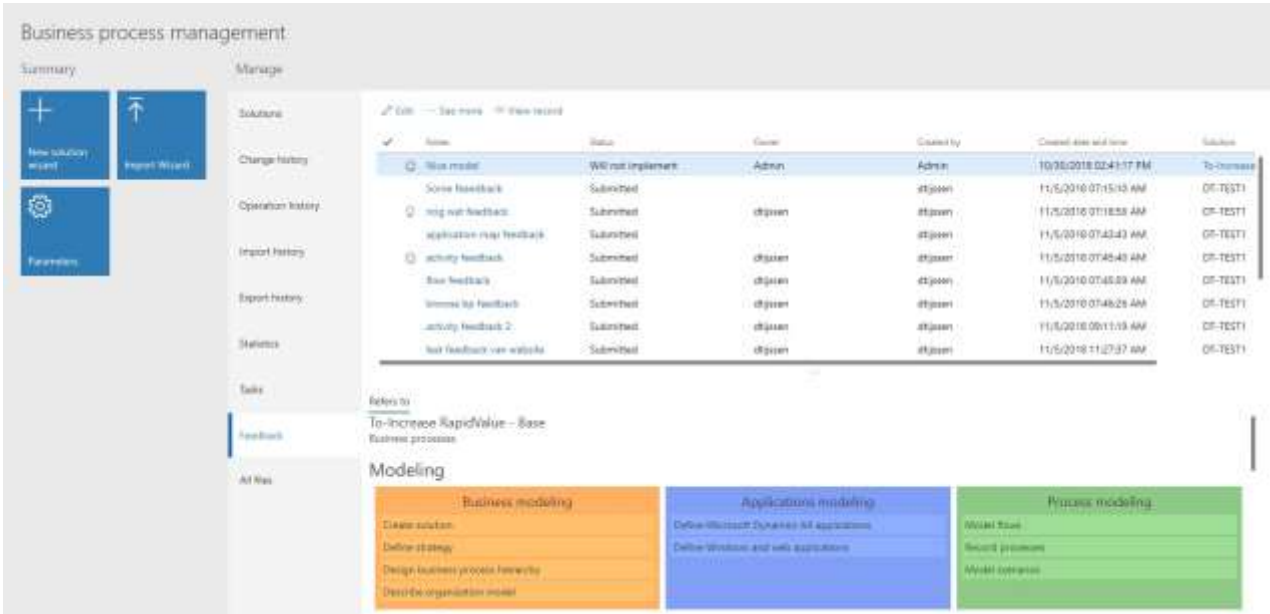


Figure-Feedback tab in Business process management workspace

Clicking on the “View record” button navigates the user to the detail form of the related record.

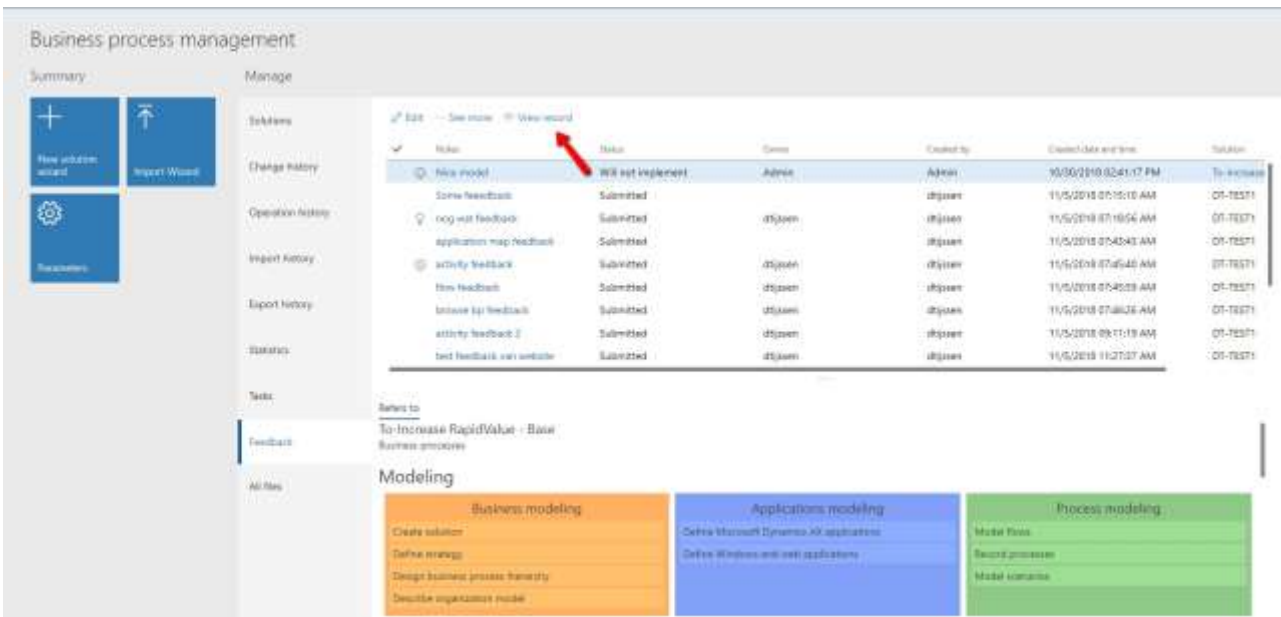


Figure-View record button in Feedback tab

- o “My feedback’ tab in Business process modeling workspace

The “My Feedback” tab in Business Process Modeling form displays all feedback related to records owned by the logged in user.

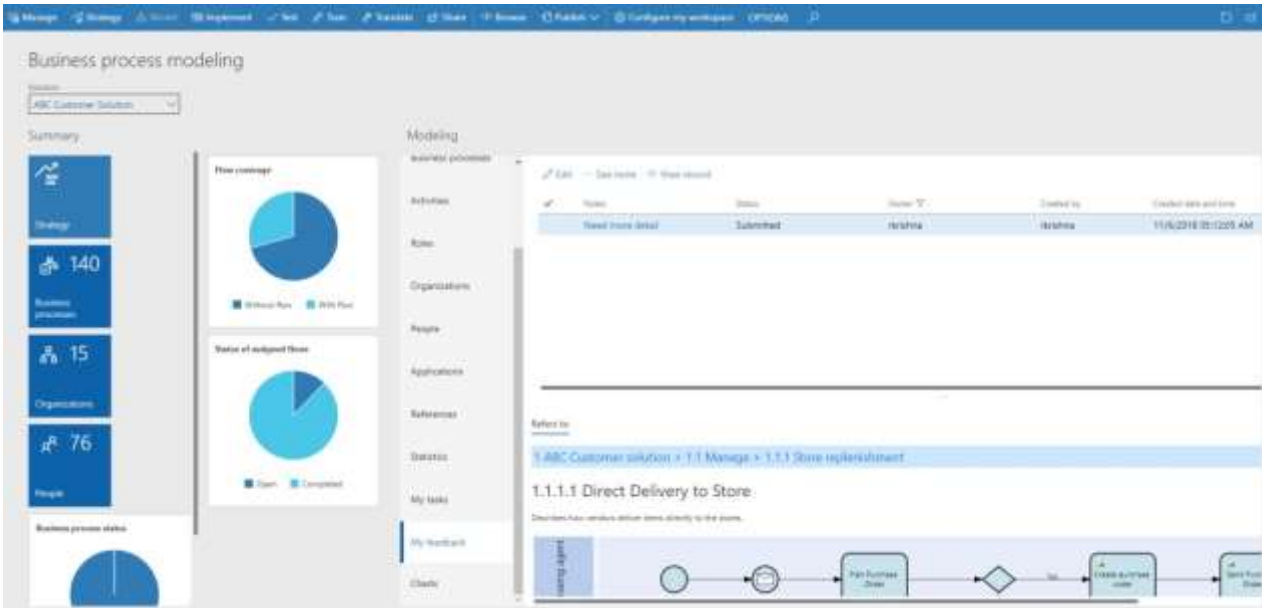


Figure-My feedback tab in Business process modeling workspace

The user can select and click on Edit button to open the detail form of the selected feedback. Once within the feedback form, the user can review the feedback and update status.

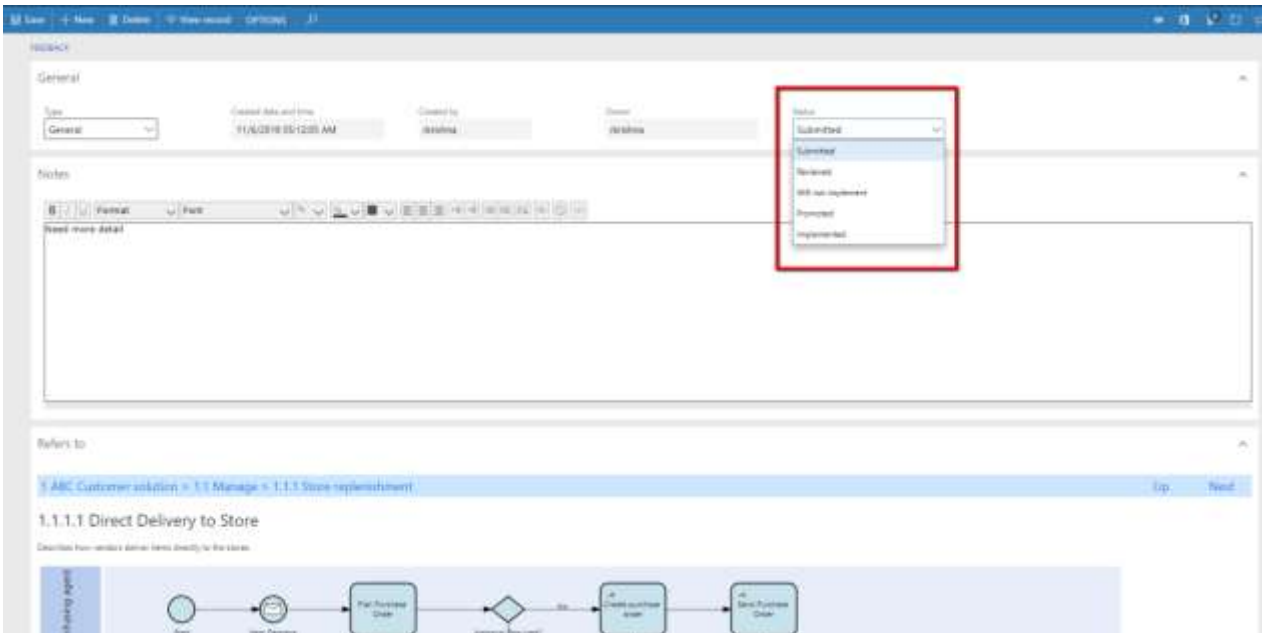
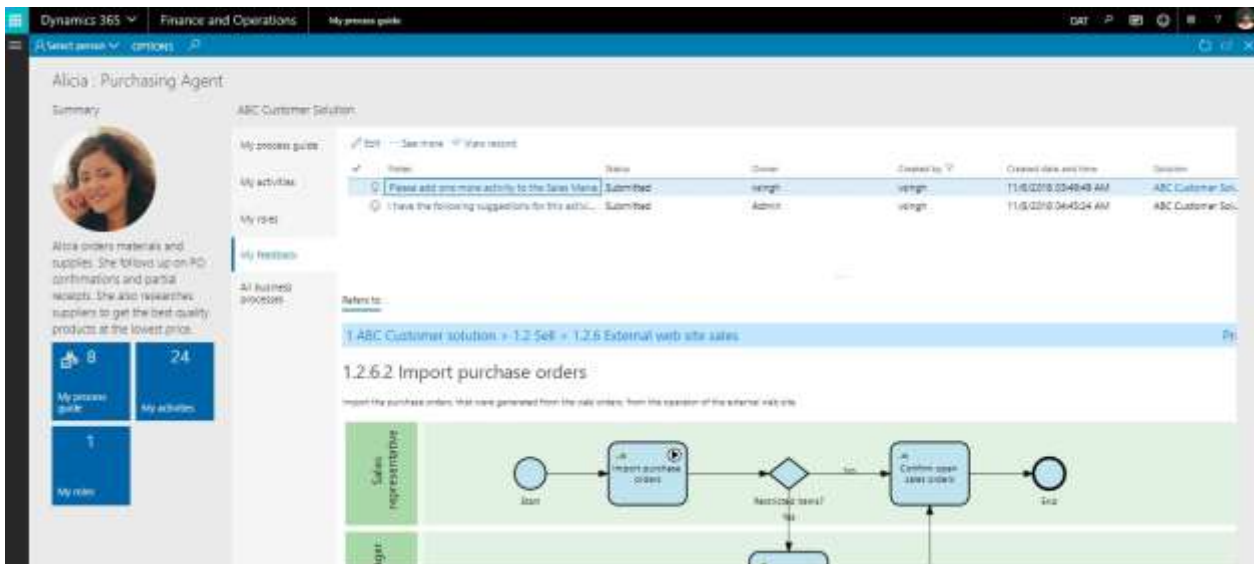


Figure- Feedback status update

- “My feedback’ tab in My process guide workspace

The “My Feedback” tab in *My process guide workspace* form displays all feedback related to records created by the logged in user.



- Import and export of feedback records

Exporting a RapidValue will export all feedback records related to the solution. Importing of a RapidValue solution containing feedback records will import those records as well.

- Providing feedback from published website

Feedback can be provided from within a webpage of a published RapidValue solution. In order to provide feedback the feature has to be enabled at a solution level before the website is published.

To enable Feedback option, inside the Tiles tab of the website form, click on the "Detail" tab. Check the "Show feedback button". This adds a "Provide feedback" button to all webpages on the published website. Note that the feedback button on the website points to the same URL from the where the website is published.

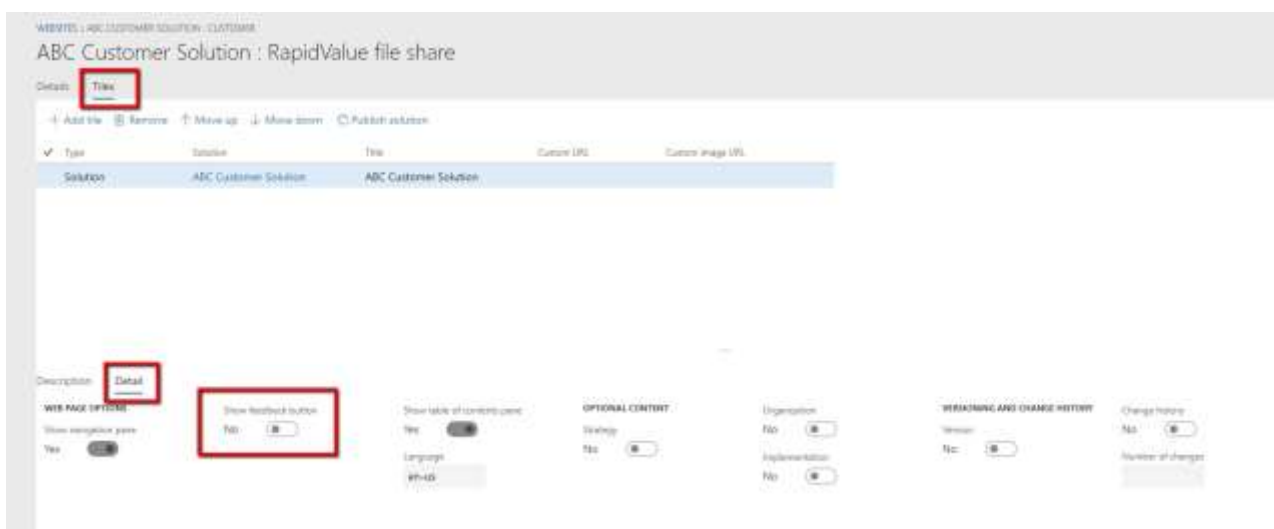


Figure-Enabling feedback in published website

To-Increase Documentation | RapidValue BPM suite

Search

Search

+ Modeling

+ Implementing

+ General

Concepts

To-Increase Documentation | RapidValue BPM suite | Modeling | Business modeling

## Create solution

You can create a solution for:

- A typical target company for your software solution. You can use such a solution to model and describe your software solution
- Implementation purposes, where the solution reflects the processes of the company it is created for

You can create a blank solution or create a solution based on an existing solution. If you create a solution based on an existing one, you can make a full copy of the existing solution or only use specific elements of the existing solution.

Process solution

## 2.28 Seamless solution data exchange using content packages

You can import a configuration from a content package. A content package consists of configuration data that is stored in RapidValue tables in XML format. For each record in a configuration, a line exists in the content package. You can import a content package from and into any Microsoft Dynamics 365 for Finance and Operations environment with RapidValue installed.

The “Content Packages” functionality can be used to move content from one machine to another machine directly by enabling connection between machines.

- To move content from one machine to another machine in the target machine connection should be established.
- Exchange of solutions between machines can be reused according to the requirements.
- Timeout issues during import process got resolved using Content Packages.
- Using content packages user has the flexibility to view all content packages which are shared across network.

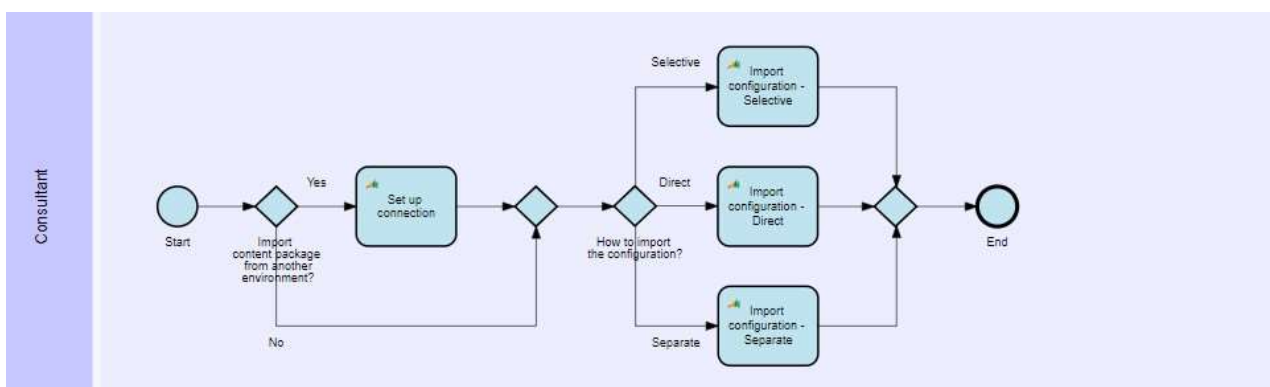


Figure- Exchanging Solution Data using Content Packages

To be able to import a content package from another Microsoft Dynamics 365 for Finance and Operations source environment with RapidValue installed, you must setup a connection to this environment.



A web service is hosted on the source environment so that a content package can be transferred from the source environment to the current environment. To access the web service hosted on the source environment:

- The user on the current environment must be authenticated by the Azure Active Directory.
- An authentication token must be received.

For this process, an application must be registered in Azure Active Directory and the required permissions must be given. You can copy the relevant information from the registered Azure Active Directory application to the related connection fields

Exporting a solution can be performed from “Business Process Management “workspace.

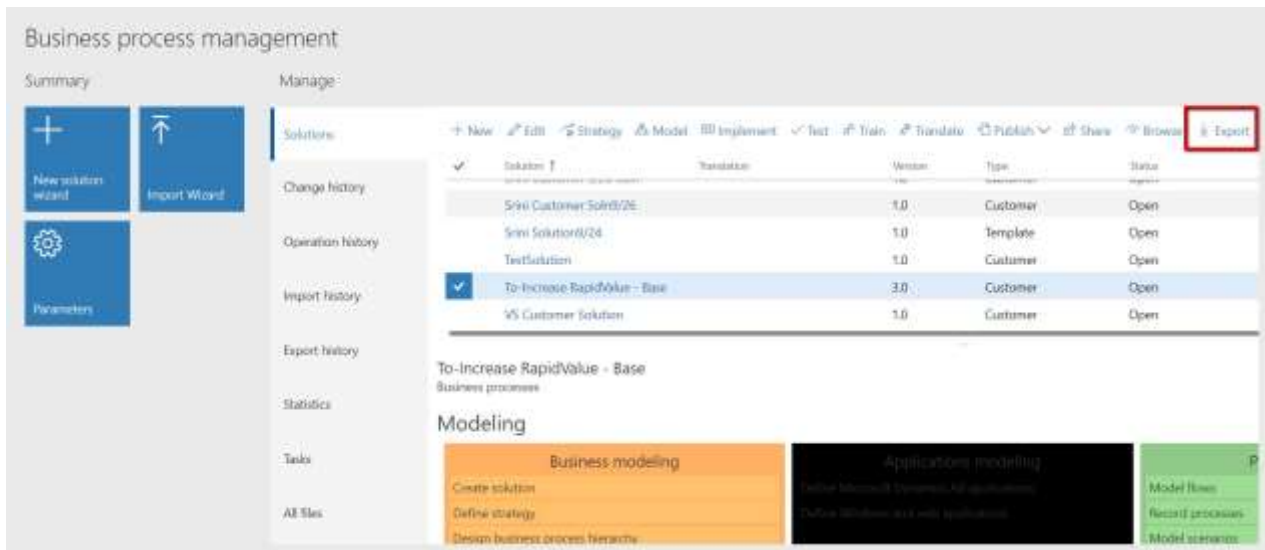


Figure - Export option on Business process management workspace

The business solution export wizard will be started by clicking on the “Export ” button. The wizard can also be started by clicking the “Export” button on the “Business process management ” workspace.

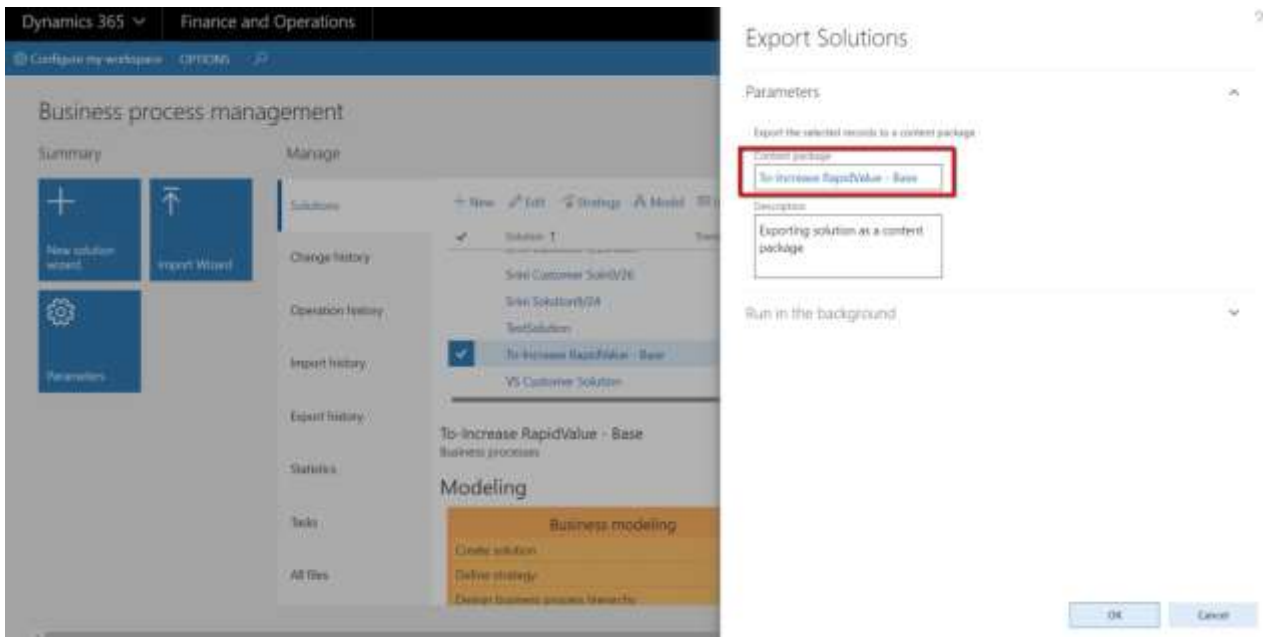


Figure - Export Solutions Parameters form

The generated content package will be found in “Business Process File share” work space .



Figure-Business Process File share -Content Packages

In the content package detail screen one needs to enable share checkbox.

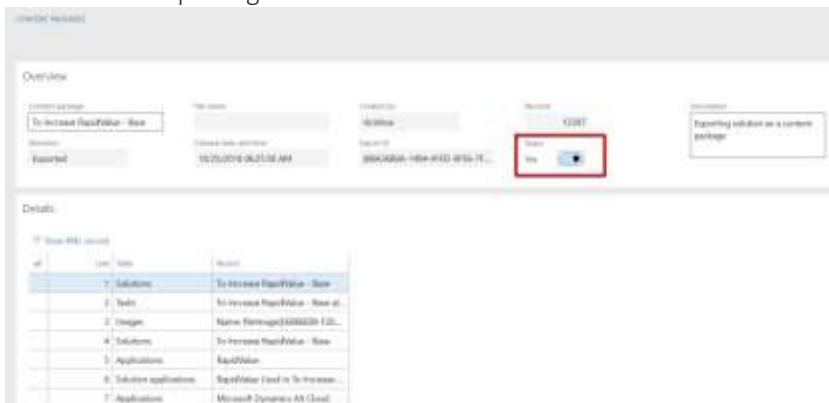


Figure - Enable Share button in details page

View list of records in the details page.

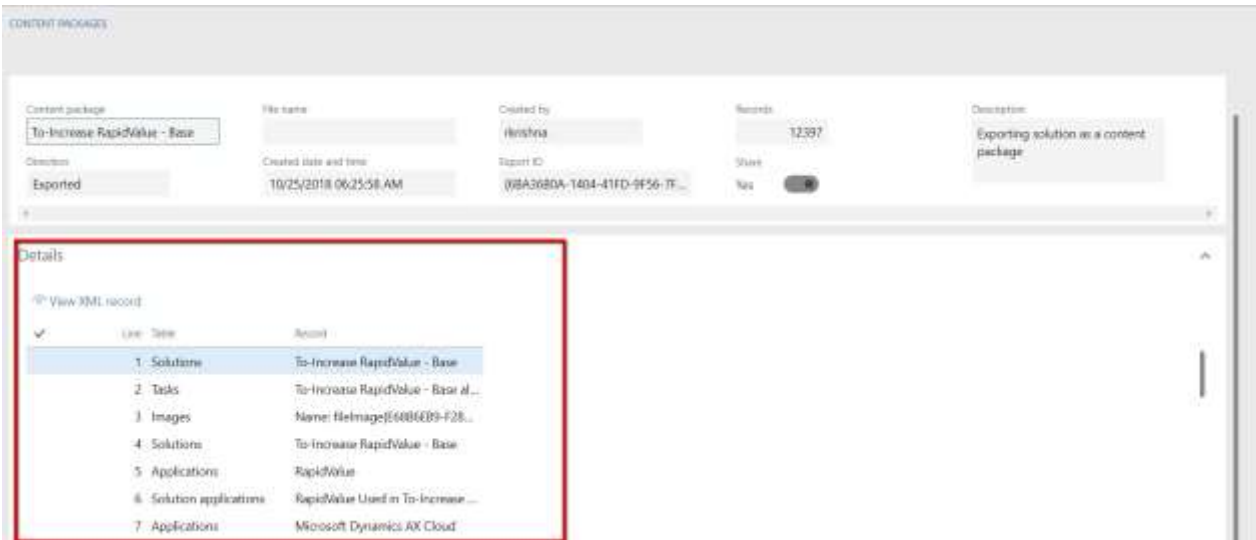


Figure-List of records in the detail page.

Once the connection establishment is completed click on “Test connection” to check the connection establishment.

Import Solution from Import Wizard in Business Process Management work space.

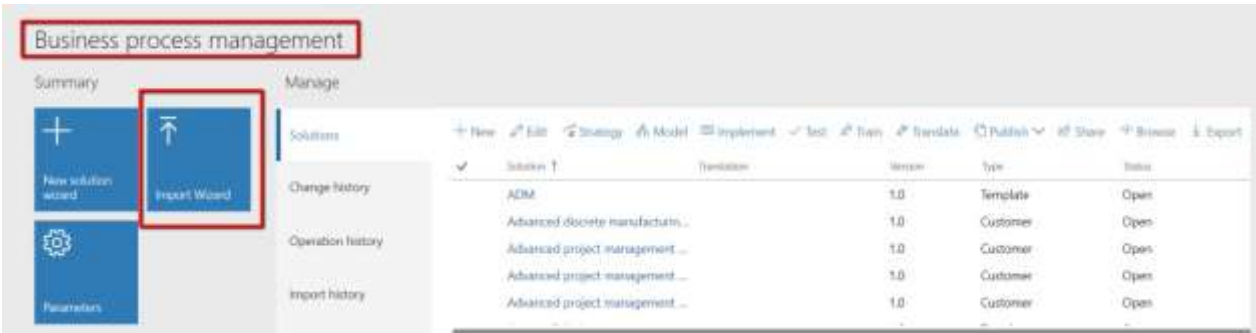


Figure- Import Wizard – Business process management workspace

Import Rapid value data

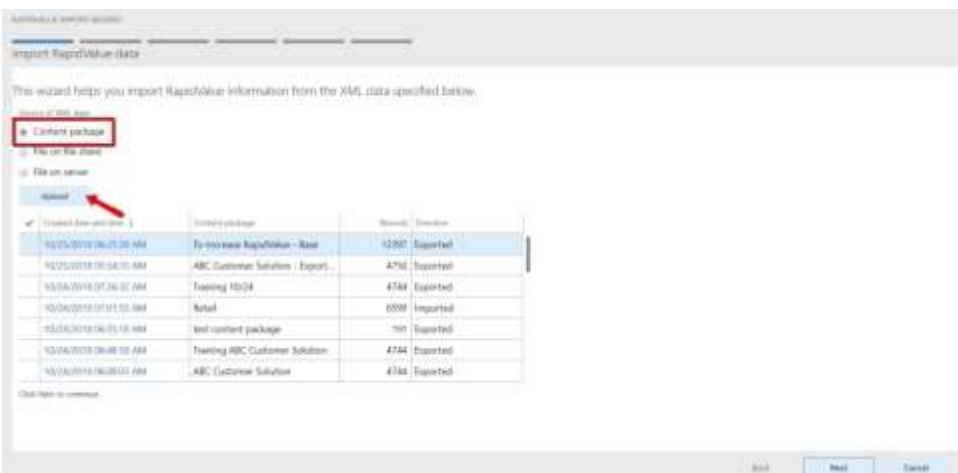


Figure – Import Rapid Value data – Content package.

Import Rapid value data – Select Connection



Figure - Import Rapid Value data – Connection Selection.  
 Select content package from the list of content packages.

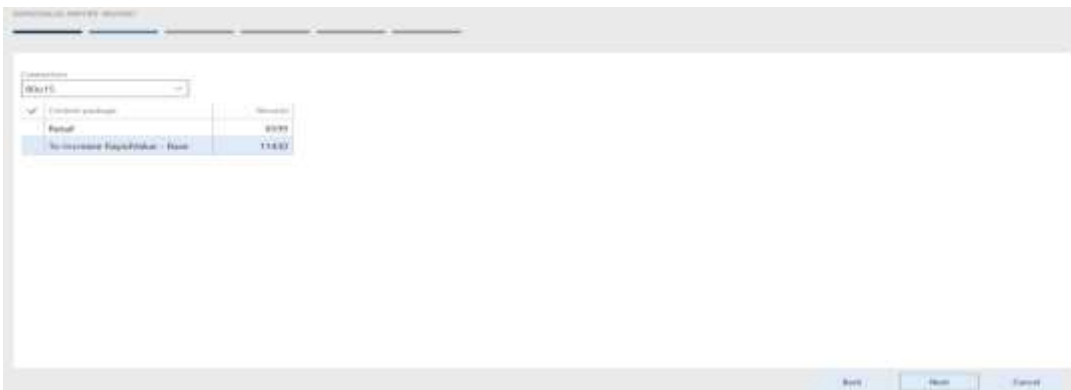


Figure – Select content package from the list

Import Content package .

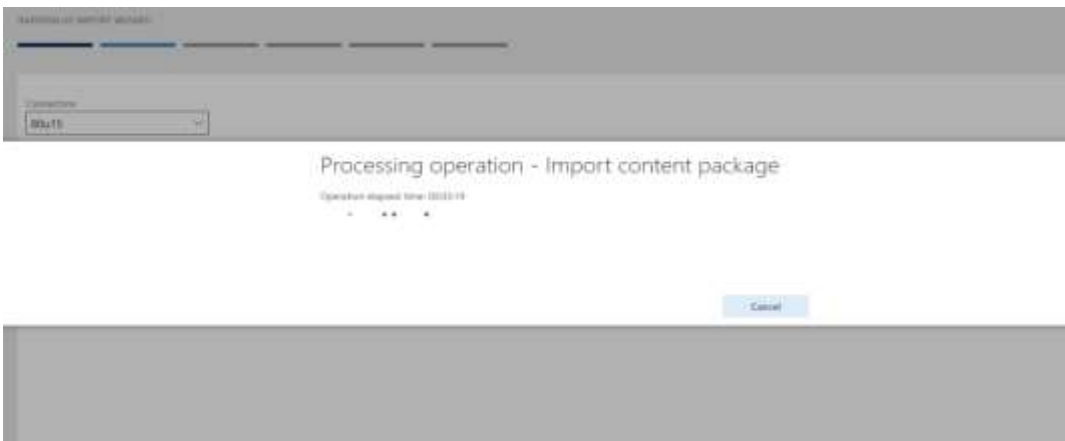


Figure - Importing content package.

Importing Content package



Figure – Import Wizard – Data Import Mode selection.

Click on Finish button to import content package to target machine.

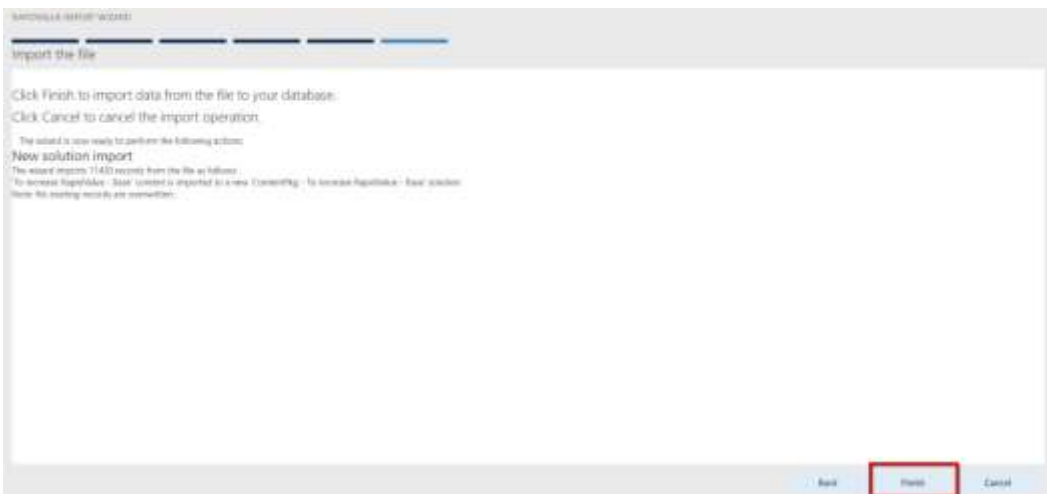


Figure - Click Finish to import content package .

## 2.29 Search and feedback capability on the Published Website

A published website can have several navigation options:

Title bar - A bar shown at the top of each pane. The left link opens the title page of the website. The right link opens the solution main page.

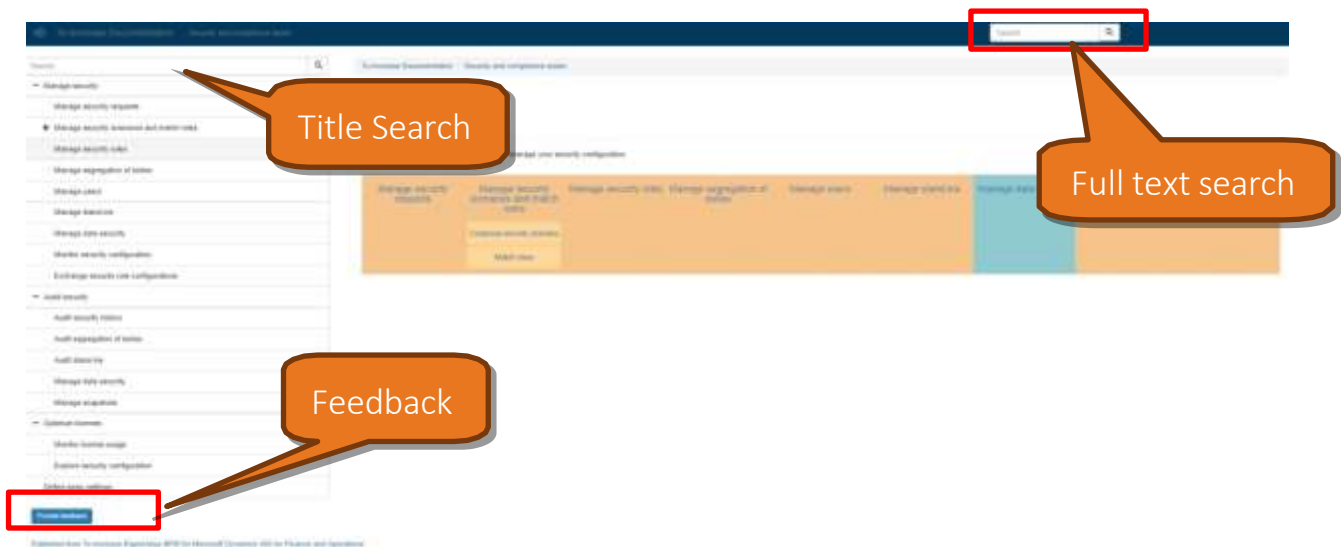
Navigation pane - A bar shown below the title bar of a page that shows the navigation to the currently shown page. The most-left link opens the title page of the website. The second-from-left link opens the solution main page. This pane is only shown if defined in the solution tile detailed settings.

Table of contents pane - The business process hierarchy is shown as table of contents in a pane at the left of a page. This pane is only shown if defined in the solution tile detailed settings.

Title search - A search option at the top of the table of contents that you can use to search on the titles in the table of contents.

Full-text search - A search option at the top-right of the title bar that you can use to search on any term used in any topic on the product website. To use this, enter the search term and then click the search button.

Provide feedback button - You can use this button to enter feedback in the RapidValue environment from which the website is published. You can only provide feedback if you are a user in this environment.



## 2.30 Improved handling for .axtr file type Task guides

You can now upload task guides of file type “. axtr” to RapidValue Activities and Test Cases.

# 3 Important Features introduced in the last few releases

This section lists down the features introduced in the last few RapidValue release to make the partners and customers aware of the new features. This release includes a number of important new capabilities and enhancements requested by customers and partners, such as:

- Improvement in table of Content (TOC) while publishing documentation website. A user can publish documentation website using RapidValue. In this release several improvements are done to TOC to gain more professional feel to the documentation website.
- Global Implementation Explorer. The global implementation explorer feature provides multiple views with the Rapid value solutions displayed in a hierarchical structure with the current solution marked. The explore tabs will the display in separated grids the business processes, flows/subflows, activities, applications and the requirements records with the functionality to pin any record in order to navigate to all the related records from the above list of entities. This provides a 360 Degree drill down capability with the help of the explore tabs and is extremely useful in global rollouts and large implementations with multiple solutions.
- Enhanced “New Solution Wizard” with multiple options to copy a solution content. During the copy process of solutions more options are required to create a new solution that contains the proper starting point for any new implementation or content creation project. Therefor some new options have been added to the “New Solution Wizard” to control what needs to be copied or to control what starting values some fields will contain.

- Referencing Requirements across multiple business process and solutions. Till now one requirement in RapidValue can be linked to only one business process in the RapidValue solution. However, a requirement might have impact on more than just one business process. Therefore, in RapidValue we need the ability to link one requirement to multiple business processes. This helps in avoiding duplication and helps in referencing requirements across multiple implementation projects.
- RapidValue and Visual Studio Team Services Integration. You can now avail of the two way integration between RapidValue and Visual Studio Team Services Integration. The VSTS integration will be realized by mapping *business processes* and *requirements* in RapidValue to work items in VSTS. The mapping will be done by saving from RapidValue to VSTS (using user defined mapping rules defined at the solution level) or by mapping existing work items to RapidValue elements. Also it will be possible to refresh the status in RapidValue from VSTS items.
- Publish RapidValue Solutions along with Task Guides to Microsoft Dynamics Lifecycle Service (LCS). This release comes with a feature to let you publish a complete RapidValue solution hierarchy with linked task guides to LCS. This feature represents a very important component of our “Better Together” theme for RapidValue BPM Suite and Lifecycle Services coexistence. With this capability we will enhance partner adoption, customer adoption and customer satisfaction. LCS is not a BPM solution and RapidValue is not an ALM solution. RapidValue combines best of breed BPM capabilities with Application mapping and uses LCS to connect with Microsoft Dynamics AX capacities by pushing the BPM data into LCS Business process modeler. Combined these solutions are a strong differentiator when competing head-to-head against other tier-1 ERPs.
- Improved End user form guidance while navigating standard D365 FOE forms. This release comes with an improved end-user form guidance while performing daily tasks on the D365 FOE forms. The RapidValue BPM suite form guide allows process guidance to be embedded in any D365 form without requiring specific form customization. Two improvements are the *displaying of the interactive form guidance ribbon* in each D365 forms and *including manual activities* as well in the My Process guide workspace.
- Modeling Scenarios for a business process. You can now model scenarios for a business process with a flow assigned. A scenario can be, for example, a specific route through an existing flow. You can have multiple scenarios capturing different flow variations, each with their own task recordings. You can also create test suites and test cases based on these scenarios.
- Defining and applying Text Templates. You can now define text templates that can be applied to descriptions and other formatted text fields in RapidValue. Text templates may be conditional by requirement type, gap type, etc. Default text templates can be applied when creating new records and also can be made to work in an on demand basis.
- Ability to Publish RapidValue content to website. You can now publish a solution or multiple solutions as a website. You can use this website directly from your file system or deploy it to a web server to share the solution on internet or internal SharePoint portal for knowledge management. You can, for example, publish a solution as a website for review of your solution or as on-line user guidance for employees who do not have access to D 365 FOE.
- Utilizing the new Business strategy Workspace. This release comes with a separate new workspace for managing Business strategy. The two key new features are Business model Canvas and Process Capability mapping. These complements the already existing capabilities to define organization strategy, mission, goals, KPIs along with evaluations.

### 3.1 Using RapidValue a user can publish documentation website.

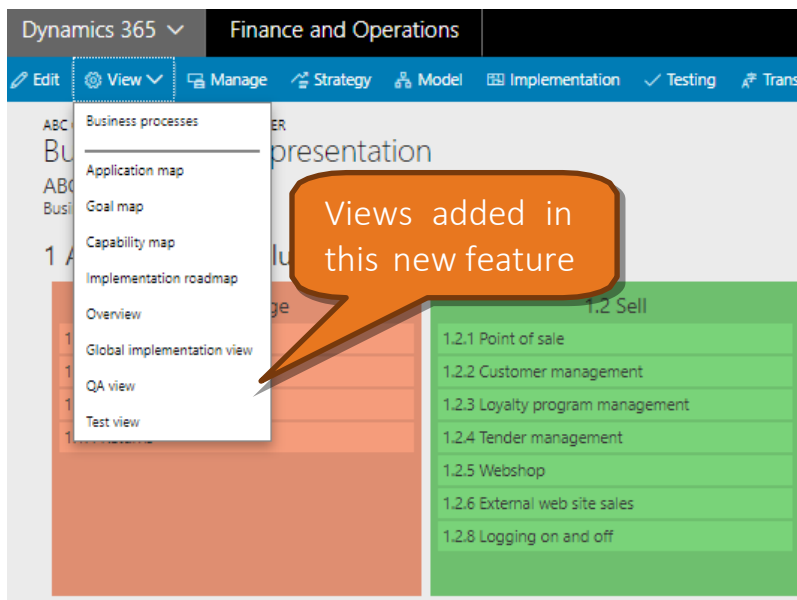
Using RapidValue a user can publish documentation website. To provide a professional look and feel, several improvements to the table of contents (TOC) are made. The alignment of TOC items is improved, while having a larger clickable area. In order to make the TOC more intuitive and easier to use, some behaviors were changed. The TOC open the topics that have an expand button next to them once pressed, as well as retaining its state when navigating between pages.

### 3.2 Global Implementation Explorer.

The global implementation view will display a basic summary of each solution and provides drill-down to solution views and workspaces. The explore tabs provides lists of records and navigation to related records using the pin functionality.

- New preview that spans multiple solutions in the RapidValue environment

The global implementation view can be accessed from the *Browse* Menu.



The view provides a diagram with all the related solutions of the current solution in a hierarchical structure from up to down. The name is displayed for each solution in the diagram and the click event will open the business process view form of the selected solution. The current solution is marked with a different color in this diagram.



- Shows basic summary of each solution and provides drill-down to solution views and workspaces

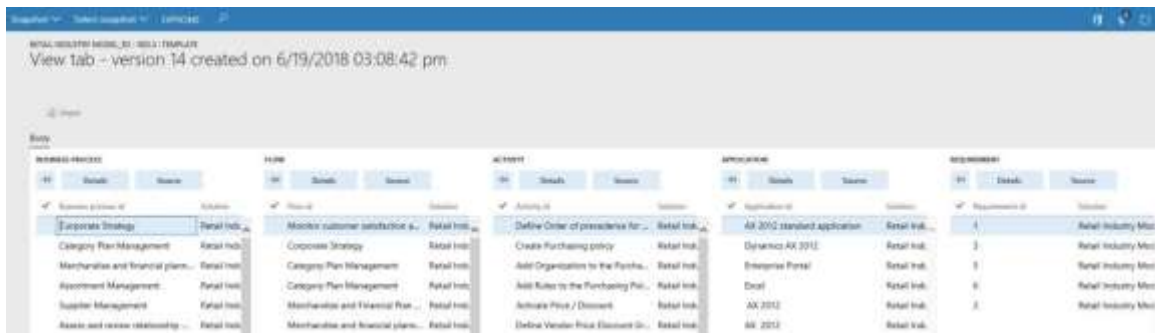


- Explore tabs
  - Explore tab provides list and field based insight into how the record relates to other parts of the model
  - Explore tabs it's using stored data (snapshot data) from separated tables that are populated with the records from the business process, flow, activity, application and requirement tables including the relation between them. Multiple sets of data (snapshots) can be stored under different versions.
  - There are two views created with different content: QA view and Test view
  - In the explore tabs form you can pin a record in order to show the related records from the other tables.

The Explore tabs form can be accessed from the *Browse* menu.

There are two views created:

- 1) QA view: contains 5 grids and displays the data from the business process, flow, activity, application and requirement tables. For each table two columns are displayed: identification field and solution. For the business process table one additional column is displayed: Milestone id. These 5 grids can be filtered by any column.
- 2) Test view: contains 5 grids and displays the data from the business process, test suite, test run, role and requirement tables (the display order of these grids is not decided yet). For each table two columns are displayed: identification field and solution. For the business process table one additional column is displayed: Milestone id. These 5 grids can be filtered by any column.



In the explore tabs forms the user can do the following actions:

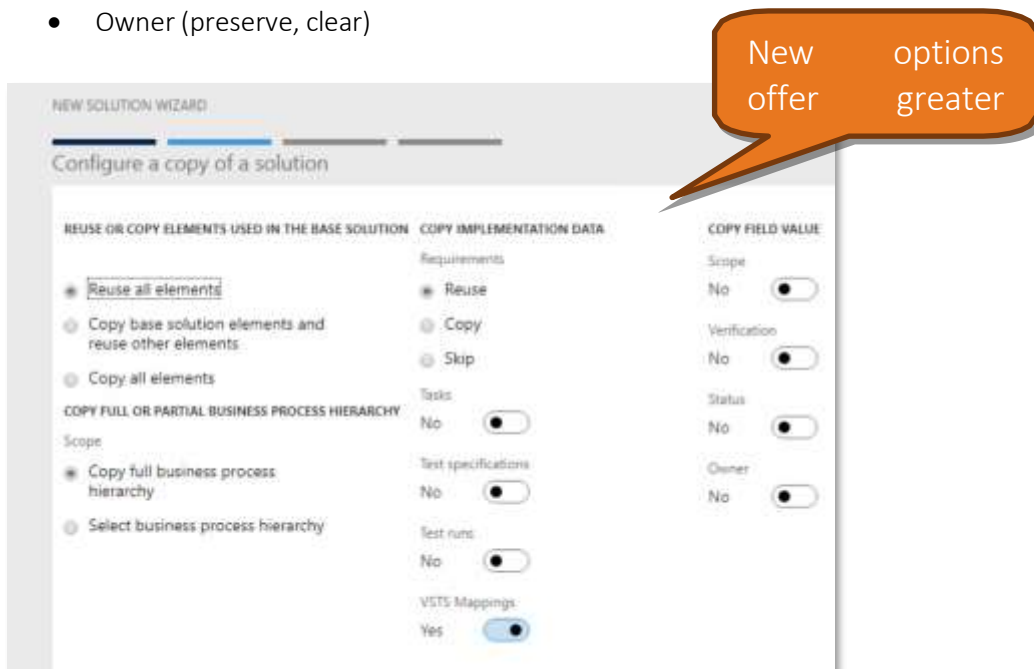
- Create new snapshot data with the existing information from those five tables. This operation should be executed in batch since is a time-consuming operation.
- Select a different snapshot version to be loaded on the form.
- Delete the current snapshot version.
- Pin a record in one from those five grids. This action will trigger the other grids to show only the related records of the pinned record using the logic from the following example:
  - If you pin an activity, the flow list will show only the related records of the pinned activity record and the business process list will show only the related records of the previous records displayed, in this case, from the flow list. The same logic will be applied for the lists located on the right of activity list.
  - Because the requirement table has relations with all of the other tables from this form, when an activity is pinned, the requirement list will contain also the records related to all of the records from the lists that were already filtered.
  - When a record is pinned, the related records are queried from all the solutions ignoring the current one, this means that it also shows records from referenced solutions. When you unpin the current record, all the lists will display only the records from the current solution.
- View details about the selected record that is stored in the snapshot data which is not visible on the grid.
- Navigate to the original record of the one stored in the snapshot data if still exists in the database.

### 3.3 Enhanced “New Solution Wizard” with multiple options to copy a solution content.

Solutions in RapidValue can be copied using the ‘New Solution Wizard’. In this wizard the user needs first to select whether to create a blank solution, to copy a solution or to configure a copy of a solution.

This modification will only apply if the user selects to configure a copy of a solution. When configuring the new solution, we introduce the following options to control which data or field values to include and which to exclude or clear in the new solution.

- Requirements (re-use, copy, skip)
- Tasks (copy, skip)
- Test specifications (copy, skip)
- Test results (copy, skip)
- VSTS mapping (copy, skip)
- Scoping (preserve, clear)
- Verification (preserve, clear)
- Status (preserve, clear)
- Owner (preserve, clear)

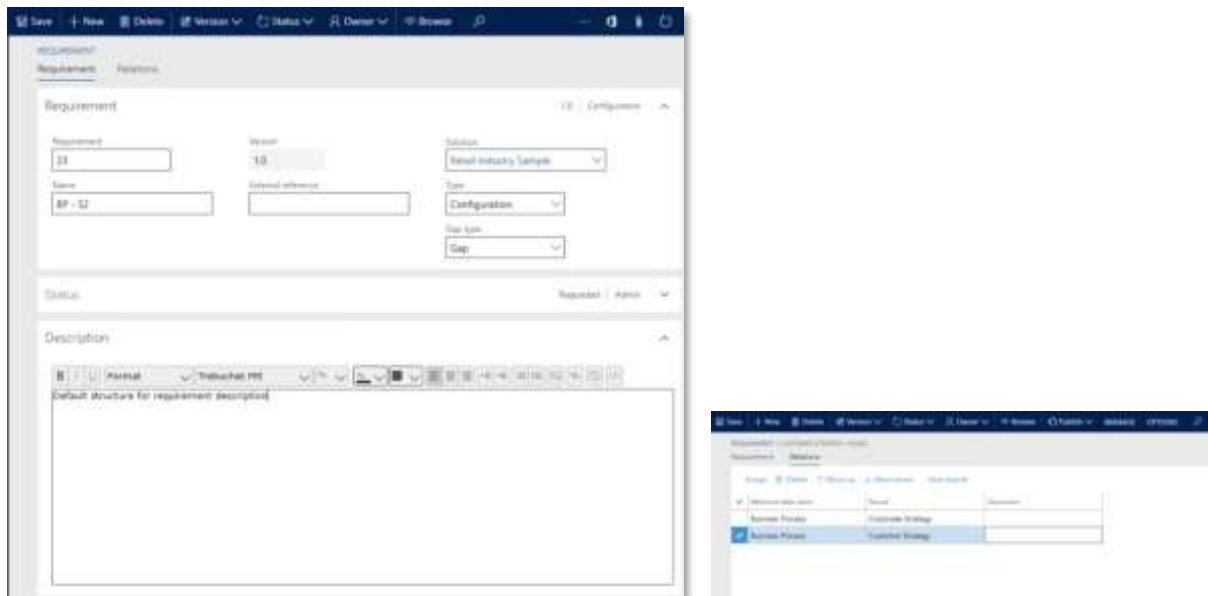


NOTE: This is not supported when copying nodes in the business process hierarchy. This screen shot above shows the configure screen with the default values. The user can modify those choices.

### 3.4 Referencing Requirements across multiple business process and solutions

The highlight of the new release is the now available ability to link RapidValue requirements to multiple business process without duplication. Now one requirement in RapidValue can be linked to only one business process in the RapidValue solution. However, a requirement might have impact on more than just one business process. Therefore, in RapidValue we need the ability to link one requirement to multiple business processes. This allows a single core requirement to show in several implementation projects, Details of the new feature changes enabled because of the new feature:

1. Enable each requirement to be related to more than one business process
2. A new requirement relation table replaces current relation fields on requirements
3. The Relations tab on the Requirement detail form will show a list of relations
4. The Requirements tab on business process forms shows any requirements with a relation to the selected business process, from the local solution or its references
5. The Requirements tab on business process forms will be able to show only requirements related to the selected business process, or all requirements related to it or any of its sub-processes
6. A new Add requirement dialog has New and Existing tabs, so existing requirements in the current solution or its references can be added to a business process.



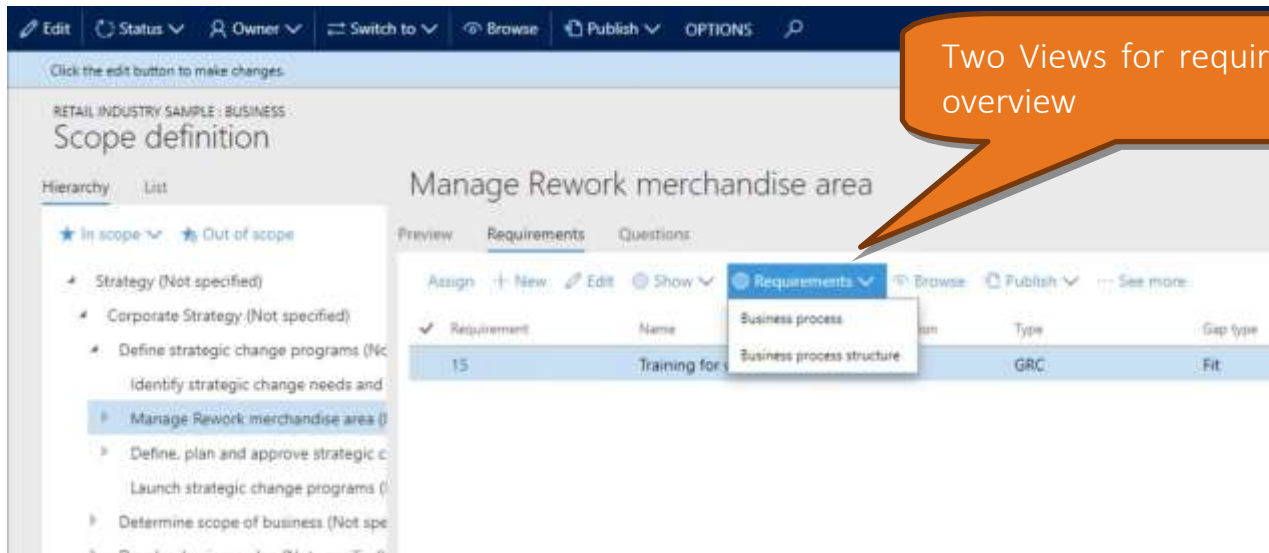
### Requirements overview form:

Requirement overview are included as a tab in some business process related forms like

- Scope definition
- Process verification
- Analyze Gaps
- Business strategy

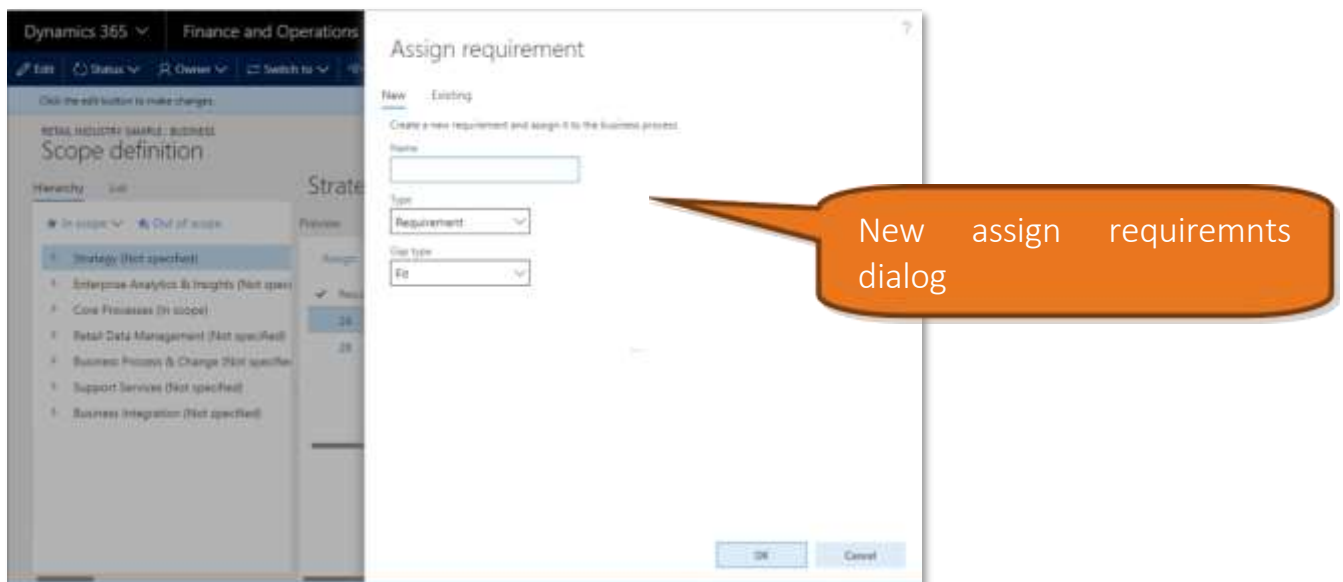
In all those forms an options is added to toggle between two views:

1. Only the requirements attached to the selected business process will be shown.
2. All requirements attached to the selected business process and its children will be shown.

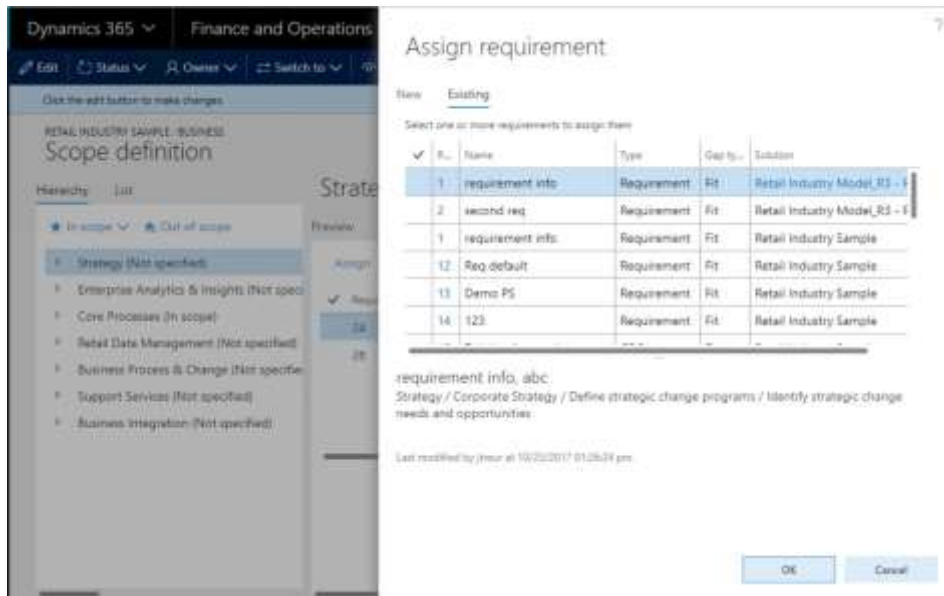


The Assign requirement dialog:

The Add requirement dialog will have two tabs, one to add new requirements and one to assign existing requirements. In the new tab, some key requirement fields can be filled. Upon clicking the OK button a new requirement is created with those fields and this newly created requirement will be assigned to record where this dialog is started. This record could be the business process, but this dialog can also be used at other places. E.g. this will support to add a new requirement and assign it to another requirement or to a flow. This will be implemented for all the relation field that are currently available on the requirement form.

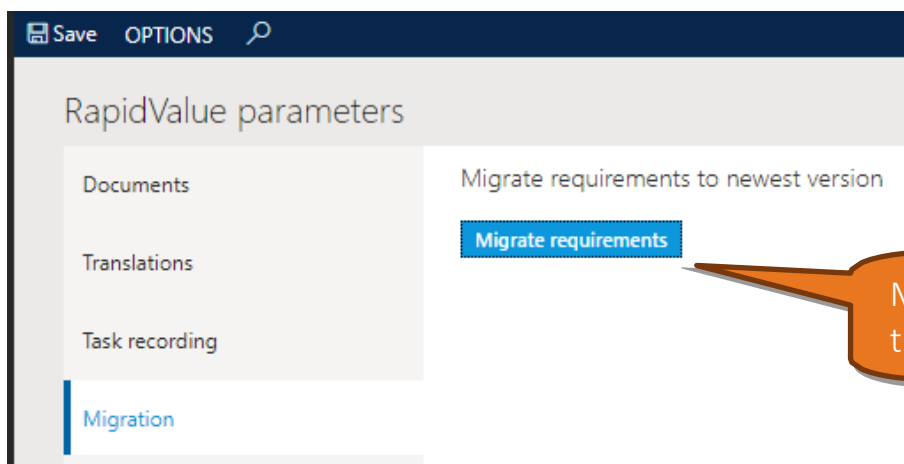


In the existing tab all requirements for the current solution will be shown, as well as all requirements for all the reference solutions of the current solution. It will be possible to select one or more requirements and upon clicking OK all selected requirements will be assigned to record from where this dialog was started. Already existing relations will not be created again to avoid duplicates.



### Migration of existing requirements:

Existing requirements might have relations to other entities like business processes or test suites. Those existing relations will be migrated to the new table structure. This migration process can be triggered by a button from the RapidValue parameters.



For relations on requirements to business processes and to test suites, a new relation record will be created in the new Requirement relation table. This migration logic will also be applied when old data sets will be imported via the data import wizard.

## 3.5 RapidValue and Visual Studio Team Services Integration

You can now avail of the two way integration between RapidValue and Visual Studio Team Services Integration. Initially you need to define mapping rules between the RapidValue entities and VSTS work items. These rules can be defined in the VSTS mapping details form where we have to specify the connection to the VSTS portal, the target VSTS project and mapping rules.

The VSTS mapping can be done at the solution level by specifying the VSTS mapping in the solution parameters. The actual mapping will be realized by a batch process that will identify the RapidValue

entities (business processes, requirements) and, using a specific VSTS mapping, it will create or update the corresponding work items in VSTS and the relations between them. The same process can also update the RapidValue entities statuses with the values from the linked VSTS work items.

In case we already have a business model defined in RapidValue and an existing VSTS project we can manually link the RapidValue business processes and requirements to the existing VSTS work items through a dialog where we can specify the work item id.

Four key business requirements for this integration are summarized below:

1. Manage VSTS mappings.
  - Define any number of VSTS process mappings between RapidValue and VSTS types and states.
  - Business process: Which type maps to which work item type, which status to which state.
  - Requirements: Which type maps to which work item type in VSTS, which status to which state.
  - NOTE: Business process mapping is specified by type, not by level in hierarchy.
  - NOTE: Activities, test suites, test cases and test runs are out of scope but the integration is designed to support those elements in future if necessary.

The VSTS mappings can be managed through the VSTS mapping form located in the RapidValue->Setup->VSTS integration. A VSTS mapping consists in defining a relation between the RapidValue entities and the VSTS entities. The relation between the RapidValue and VSTS entities is realized on the field level.

In order to define the mapping between RapidValue and VSTS types and states we need to create at least four relations:

Nr	RapidValue Entity	RapidValue Entity field	VSTS Entity	VSTS Entity field	Direction
1	Business process	Type	Object	Type	->
2	Business process	Status	Object	State	<-
3	Requirement	Type	Object	Type	->
4	Requirement	Status	Object	State	<-

Because the RapidValue types and statuses are different than VSTS types and statuses we need to define the corresponding values for each relation. For the first relation in the table we can have for example:

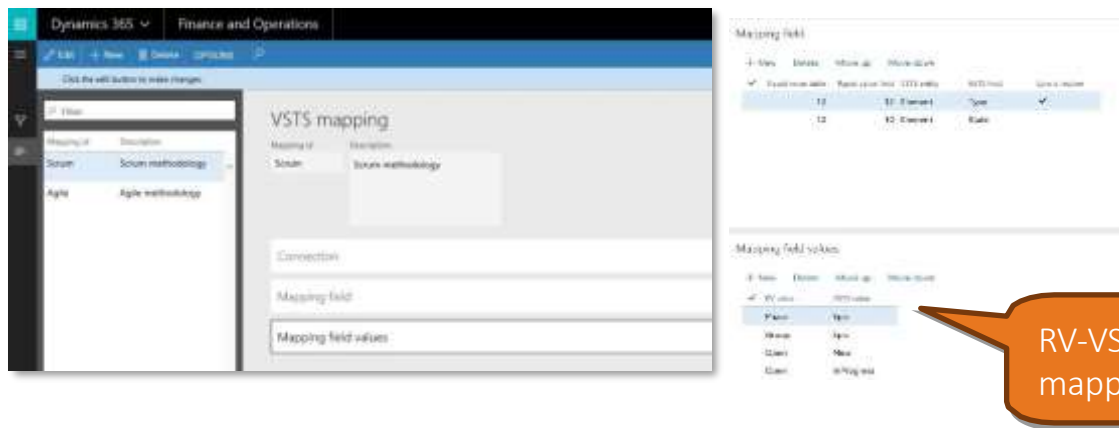
Nr	RapidValue business process type	VSTS object type
1	Phase	Epic
2	Group	Epic
3	Process	Features

It's mandatory to have unique values for the RapidValue business process type in order to realize the mapping because, according to the direction of the relation 1, the RapidValue business process type is the source and the VSTS object type is the target.

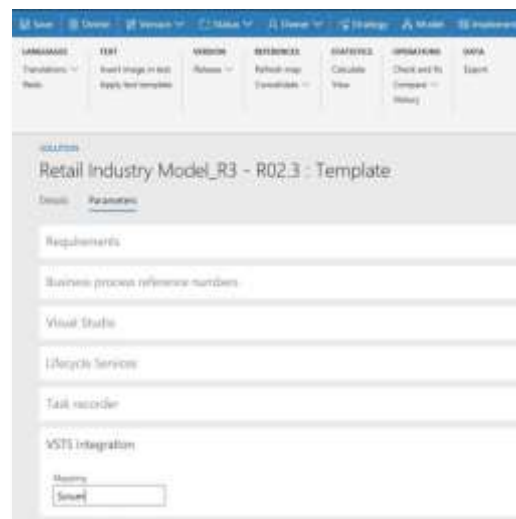
The VSTS mapping form in D365:

- The form will use lookups for the RapidValue and VSTS entity/field columns and will display meaningful names.

- In the connection tab contains the URL address of the VSTS site and the VSTS project name used by the mapping.



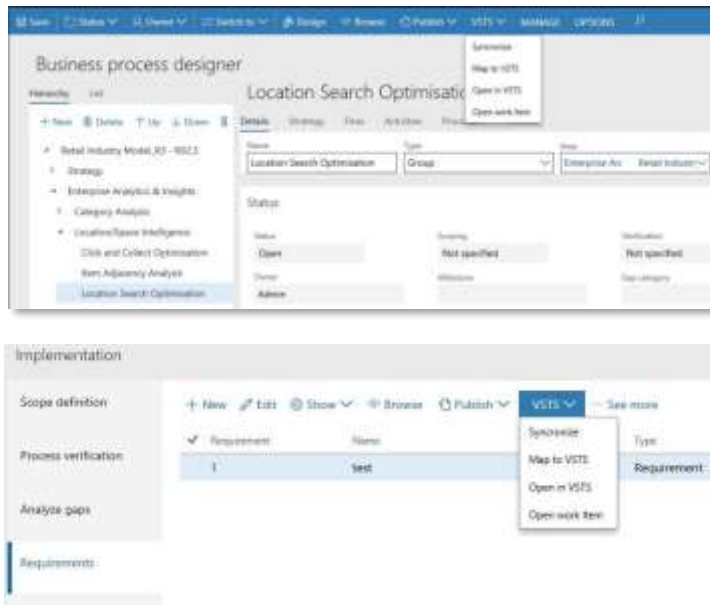
Once a VSTS mapping is created can be linked to a RapidValue solution through the form “Solution” tab “Parameters”:



## 2. Set VSTS work item on selected elements

- Manually set work item ID on selected business processes or requirements
- Simple dialog accepts and verifies work item number, no lookup experience into VSTS

In order to manually set a work item Id on the selected business processes or requirements you need to click the on the menu button “VSTS -> Map to VSTS” located on the business process and requirements forms:



The Map to VSTS menu button will open a dialog from where the user can do the following actions:

- Open the VSTS website where the user can look for an existing object and copy the object Id.
- Type the VSTS object id and click the button check to validate and to retrieve the VSTS object details: name and description.
- In case there is already created a work item with the same VSTS object Id fill the name and description.
- Select an existing work item from the grid.
- When the button OK is clicked, it will created a new work item in case it doesn't exists and it will create relations between the selected entities (business processes, requirements and other entities in the future) with the work item.
- It will not be possible to click the Ok button if the typed VSTS object id is not a valid in VSTS. The validation is done through the Check button.



Manually set workItem ID

3. Open mapped VSTS work item from RapidValue element

- Opens the mapped work item in a new browser tab

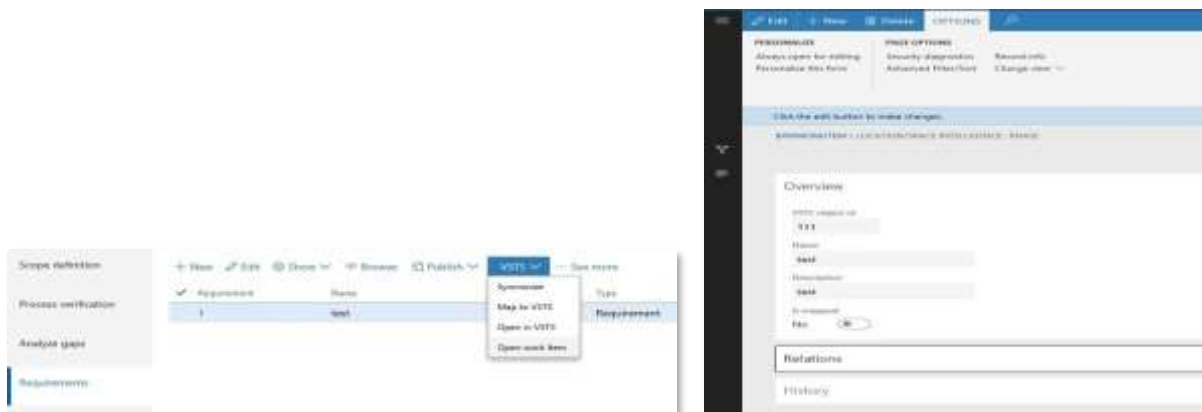


- Button is enabled only if the selected record maps to a VSTS work item
- View the RapidValue work item details

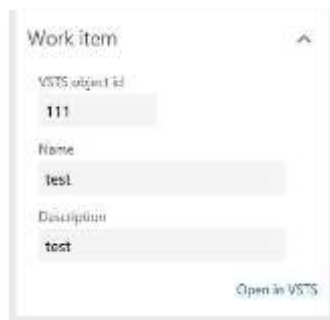
The VSTS menu button added to the requirements, business processes and to other RapidValue entities in the future has the option (Open in VSTS) to view the associated VSTS object in browser. This option will be enabled only if the current solution has mapping set and the current record has mapped work item linked to it.



The RapidValue work item details form can be accessed from the business process and requirement form using the menu button: VSTS->Open work item. The RapidValue work item detail form contains the details of the selected work item, all the active relations and the history of the actions done to it.



The business process and requirement forms contain a form part with the details of the linked work item.



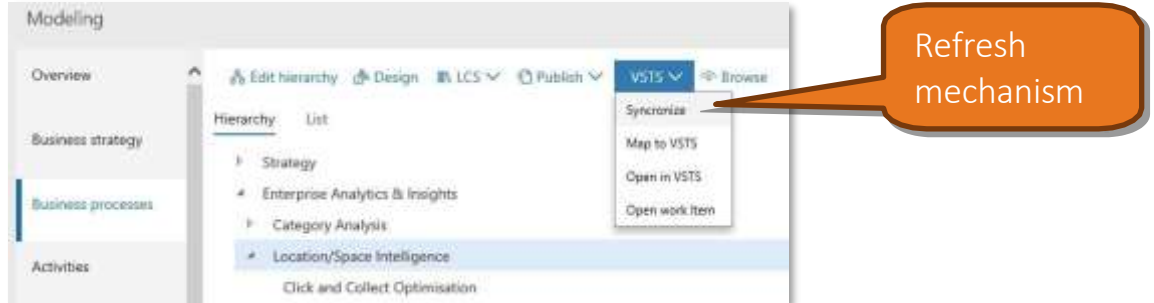
#### 4. Refresh mapped VSTS work items and update status on RapidValue elements

- RapidValue owns specifications, VSTS owns status/progress of mapped items
- Update status of mapped RapidValue elements from VSTS
- Update name and description of mapped VSTS work items from RapidValue
- Mark VSTS work item if RapidValue element is moved / cleared / deleted
- Relies on new interface table that holds mapping information for VSTS work items

- RapidValue elements relate to this table, not directly to work item id

The refresh of the mapped VSTS work items is done using the Synchronization functionality in RapidValue BPM suite. The synchronize functionality can be called for the entire solution from RapidValue->Periodic->VSTS synchronization.

There is also the option to call the VSTS synchronization for a specific requirement or business process.



The VSTS synchronization functionality consists in:

- Identify the RapidValue entities that must be synchronized with VSTS. This operation depends of the location from where the synchronization is called: solution, selected business process, selected requirement. The result can be one or multiple entities that must be parsed starting from the root.

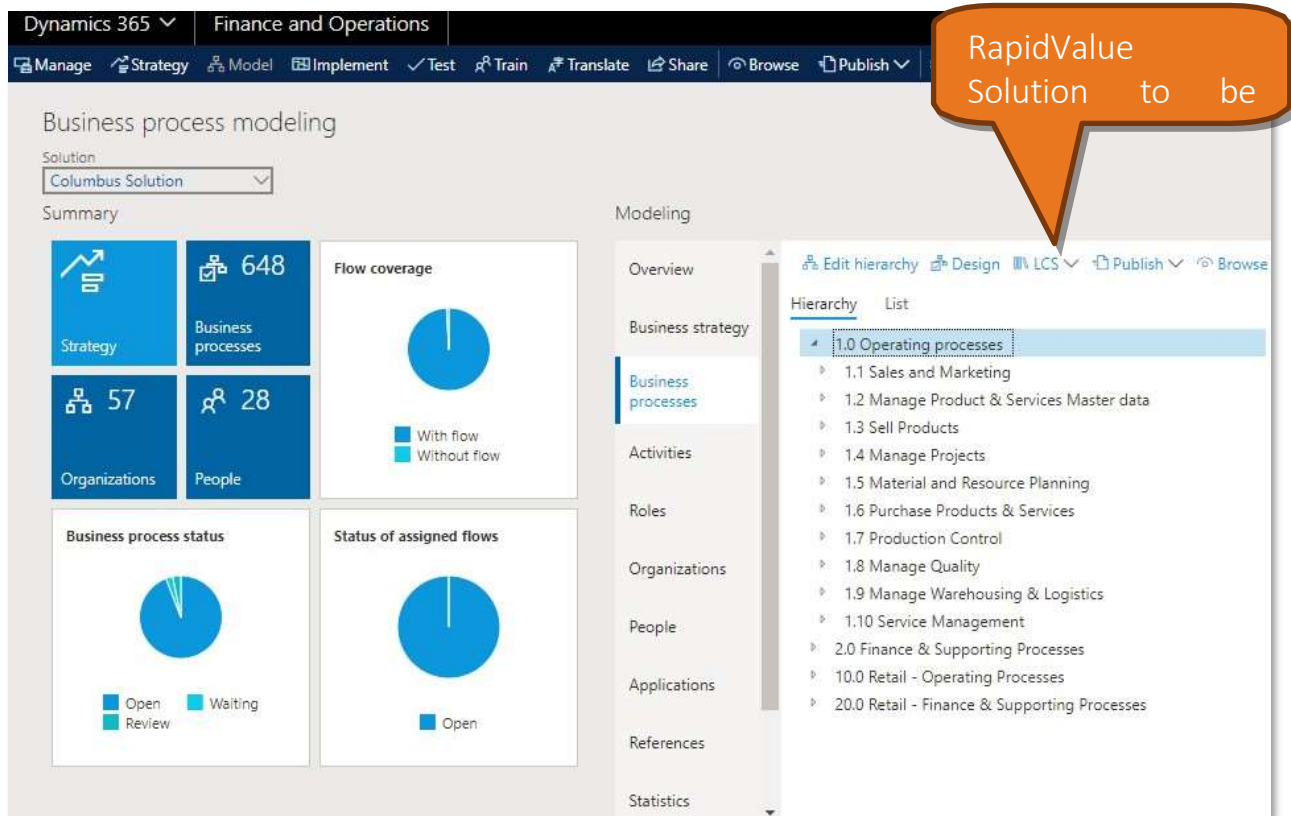
### 3.6 Ability to Publish RapidValue Solutions along with Task Guides to Microsoft Dynamics Lifecycle Service (LCS).

This release comes with a feature to let you publish a complete RapidValue solution hierarchy with linked task guides to LCS. You can publish solutions from RapidValue to Microsoft Dynamics Lifecycle Service (LCS). Partners and customers can use RapidValue to design and manage BPM content. No process modeling work is expected in the LCS Business process modeler. You can republish changes in RapidValue at any time. The main benefits of this new capability are listed below:

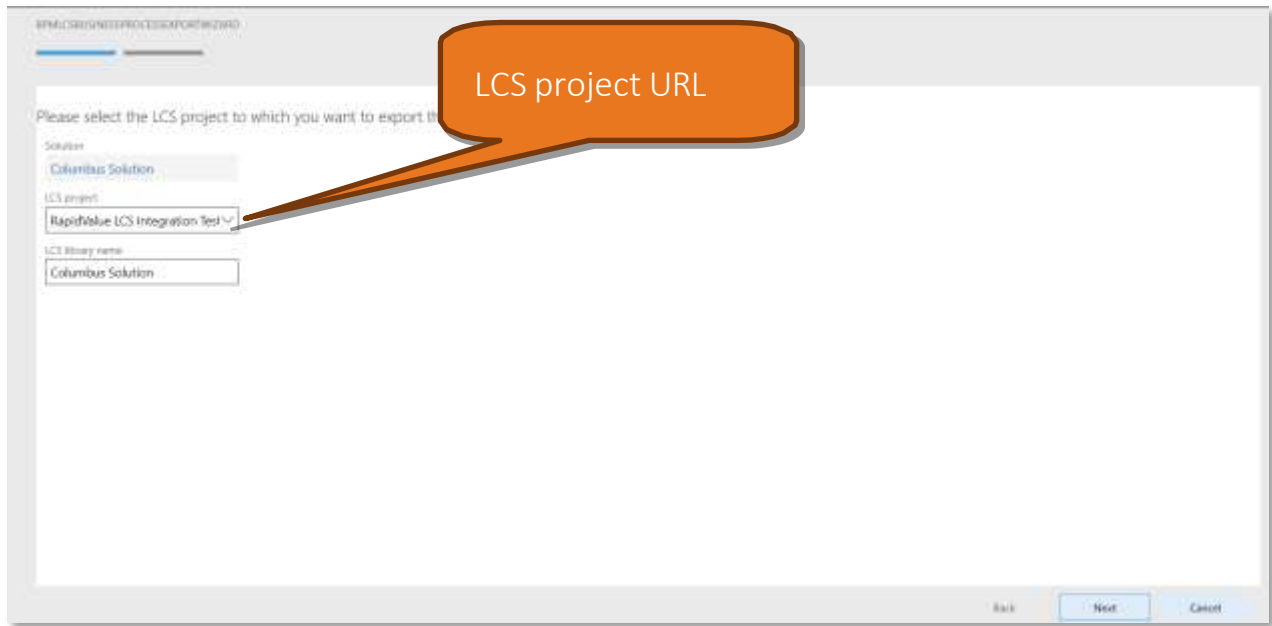
1. Main goal of publishing a RapidValue solution to LCS is to get the Microsoft Dynamics AX metadata, as defined in RapidValue, into LCS Business process modeler. So, you can maximize the value from LCS ALM tools like configuration manager etc.
2. You can now create and push complete getting started and product documentation BPM libraries into LCS at a click of a button.
3. Make use of inherent LCS –VSTS integration over the RapidValue Task guides to create Test Plan, Test suites and Test Cases in VSTS.

Overview of the whole process is briefly described below:

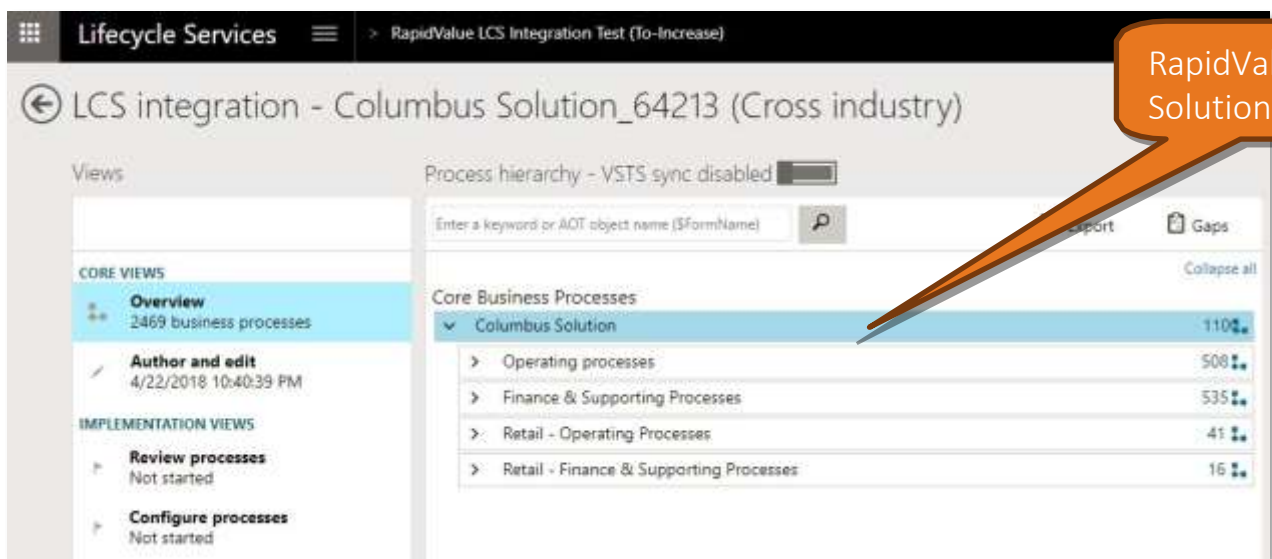
RapidValue solution to be published



Selection of LCS project and LCS library name



#### Published solution as a BPM library in LCS



You can export the business process hierarchy with its linked task guides from RapidValue to a business process library in LCS. The business process library in LCS is structured based on the business process hierarchy and flow activities, as set up in RapidValue.

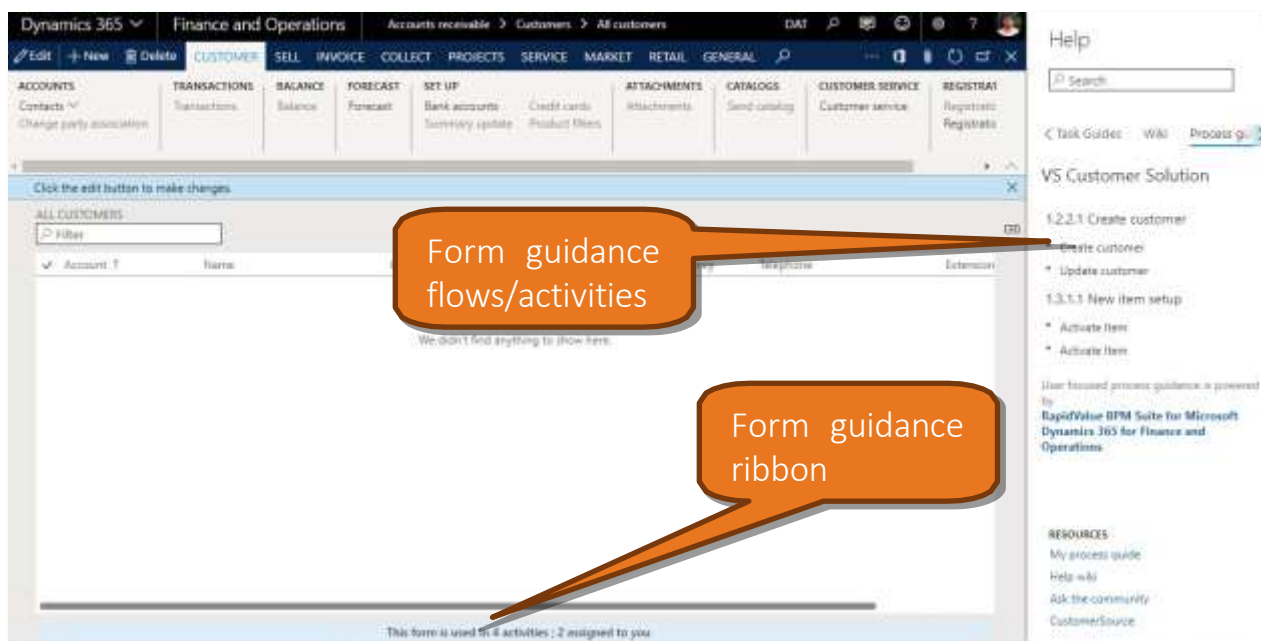
When you publish business processes to LCS, these rules are applied:

- Only business processes that are in scope or for which the scope is not specified are published to LCS.
- Each time you export to LCS, a new business process library is created. So, existing business process libraries stay unchanged.
- If a flow is assigned to a business process, the flow activities are also published to LCS.

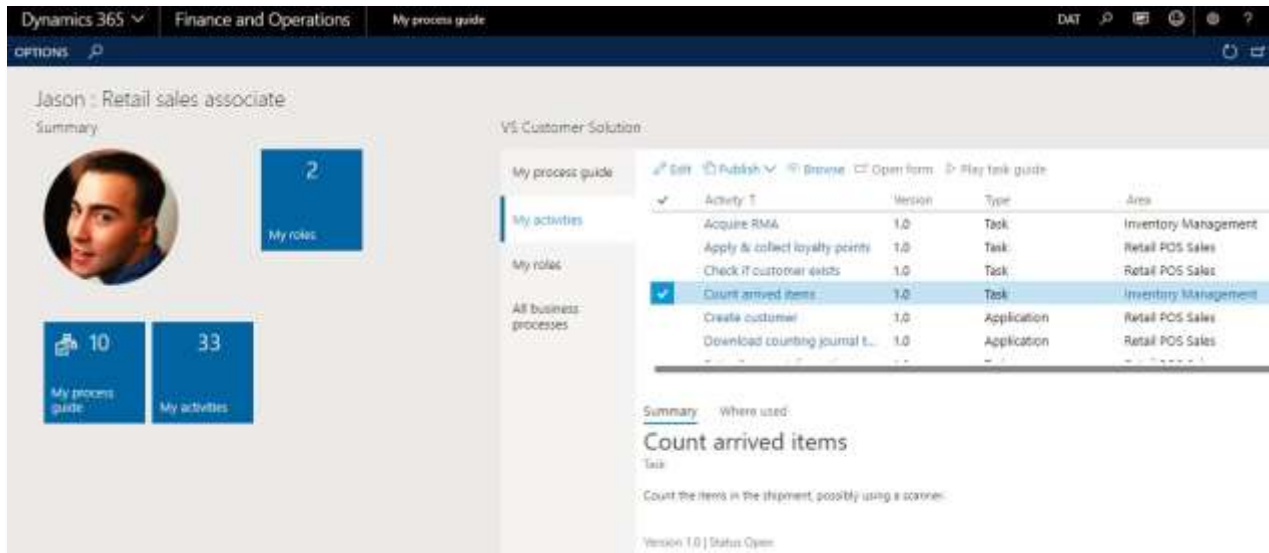
- If a both a flow and a procedure activity are assigned to a business process, only the procedure activity is published.
- If you have several flows defined for a business process, only the assigned flow is published to LCS.
- You can have a flow assigned to several business processes or used as sub-flow in several flows. Such a flow is only published once to LCS.
- For each activity, a process is created in the business process library.
- If a task guide is linked to the activity, the task guide is uploaded to the business process library process for the activity.

### 3.7 Improved End user form guidance while navigating standard D365 FOE forms

This release comes with an improved end-user form guidance while performing daily tasks on the D365 FOE forms. The RapidValue BPM suite form guide allows process guidance to be embedded in any D365 form without requiring specific form customization.



You are now at the stage where you want to take the user guidance even further. You want to provide help from the D365 FOE forms, which have been linked to the activities on the flow diagrams in your solution. This will tell the user that he uses that form to carry out particular processes and give him guidance on how to carry out that process. This also involves displaying a *where used* form for the selected form.



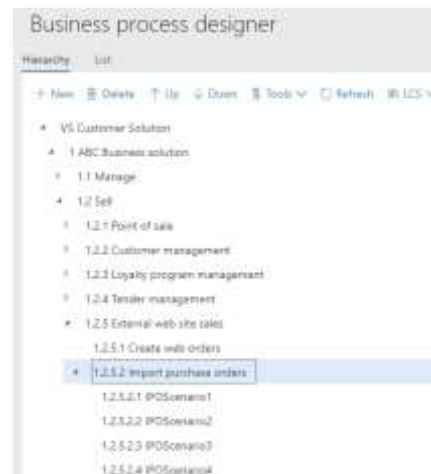
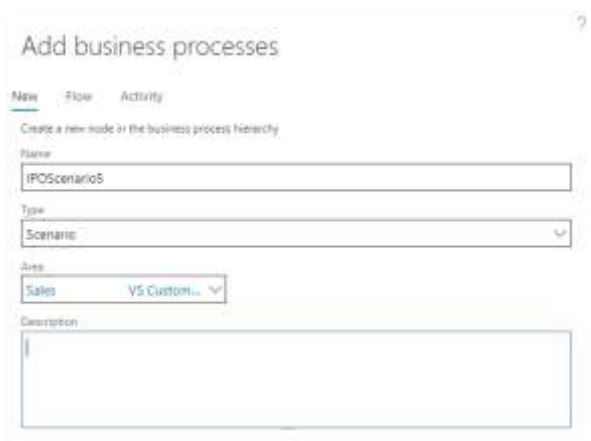
Two improvements are the displaying of the *form guidance ribbon* in each D365 forms and including *manual activities as well in the My Process guide workspace*.

### 3.8 Modeling scenarios for a business process

The highlight of this release is the now available ability to model scenarios for a business process with a flow assigned. Summary of the feature is given below.

#### Create a scenario

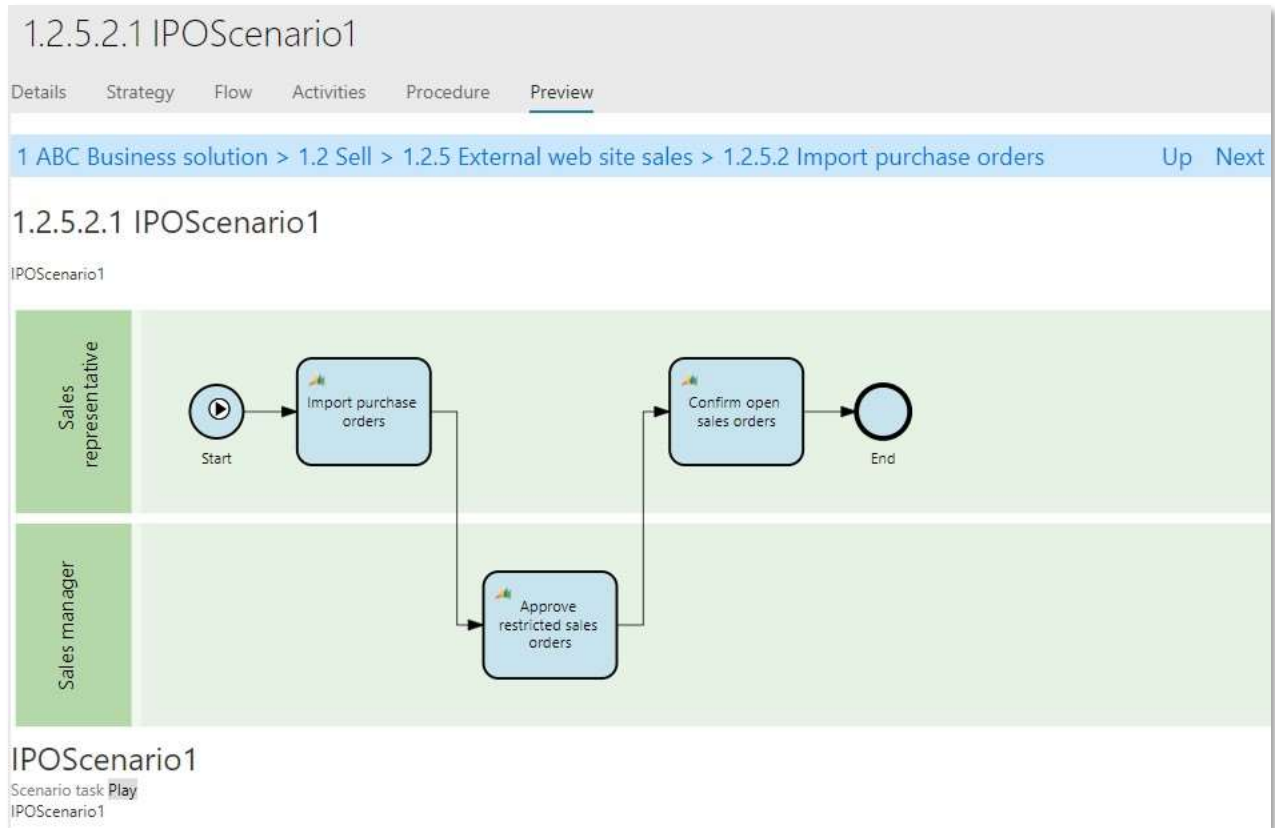
To model a scenario, you first add a business process of type Scenario. Usually, you add a scenario to a business process with a flow assigned. As a result, the flow is also added to the added scenario business process. You can also start with having a scenario without an associated flow and base it on a new scenario task recording. This can be subsequently used to generate a new flow based on the activities attached to the scenario procedure.



#### Assign procedure activity

Before you record a scenario, usually, you first assign a procedure activity to the relevant business process. If you want to model a scenario, you assign the procedure activity to a business process of type Scenario. You can assign procedure activities to a business process in several ways:

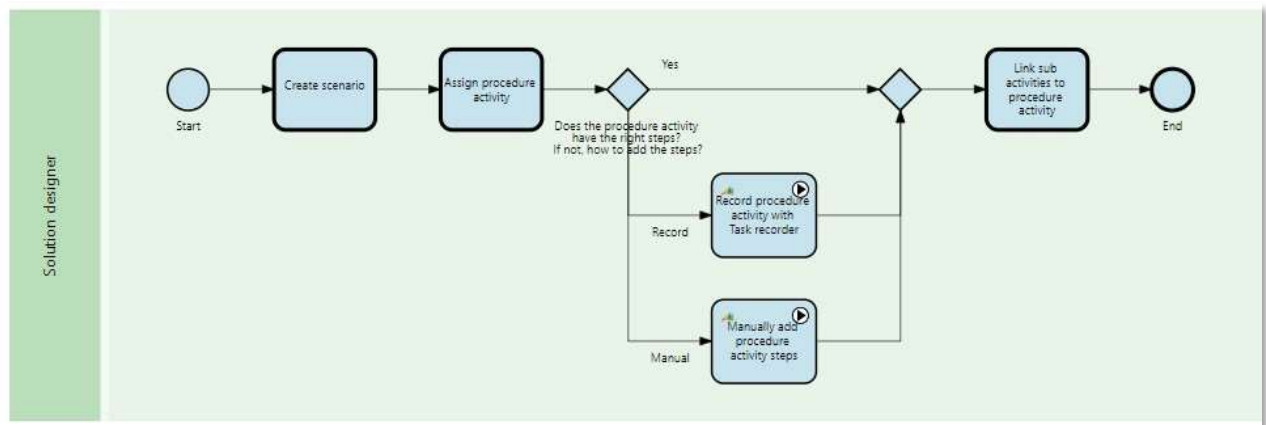
- Assign an existing activity as procedure activity.
- Create and assign a new activity as procedure activity. By default, this activity is of type Scenario.
- Assign a copy of an existing activity as procedure activity.



#### Link sub activities to procedure activity steps

If you have recorded a procedure activity for a scenario, the steps of the procedure activity cover several activities of the related flow. You can link procedure activity steps to the relevant flow activities. You can also link procedure activity steps to existing or new activities. You can also add procedure activity steps to a sub activity or replace the sub activity steps with procedure activity steps.

Over view of the whole process is captured in the flow below:

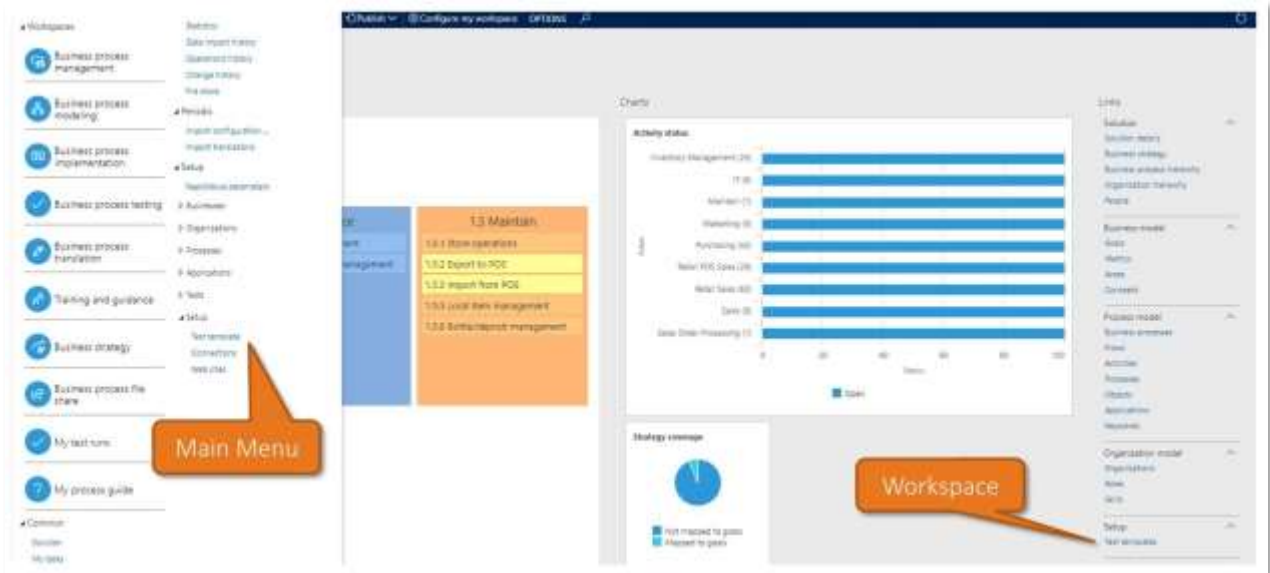


## 3.9 Defining and applying text templates

You can now define text templates that can be applied to descriptions and other formatted text fields in RapidValue. Summary of the feature is given below.

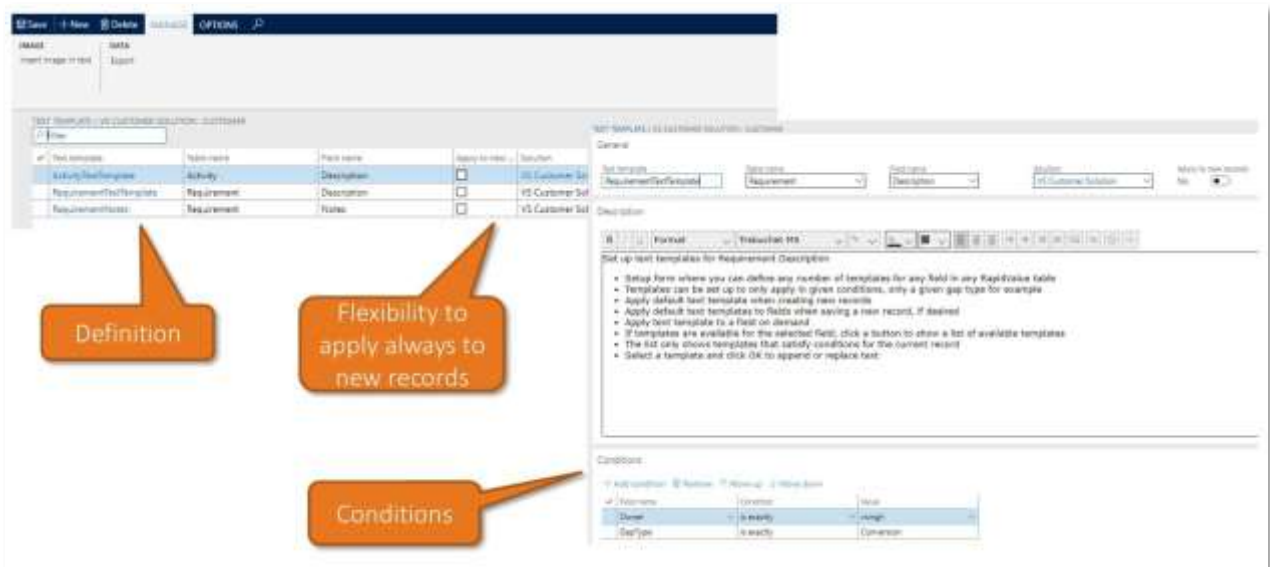
### Set up text templates

- Setup form where you can define any number of templates for any field in any RapidValue table
- Templates can be set up to only apply in given conditions, only a given gap type for example



### Apply default text template when creating new records

- Apply default text templates to fields when saving a new record, if desired
- Apply text template to a field on demand

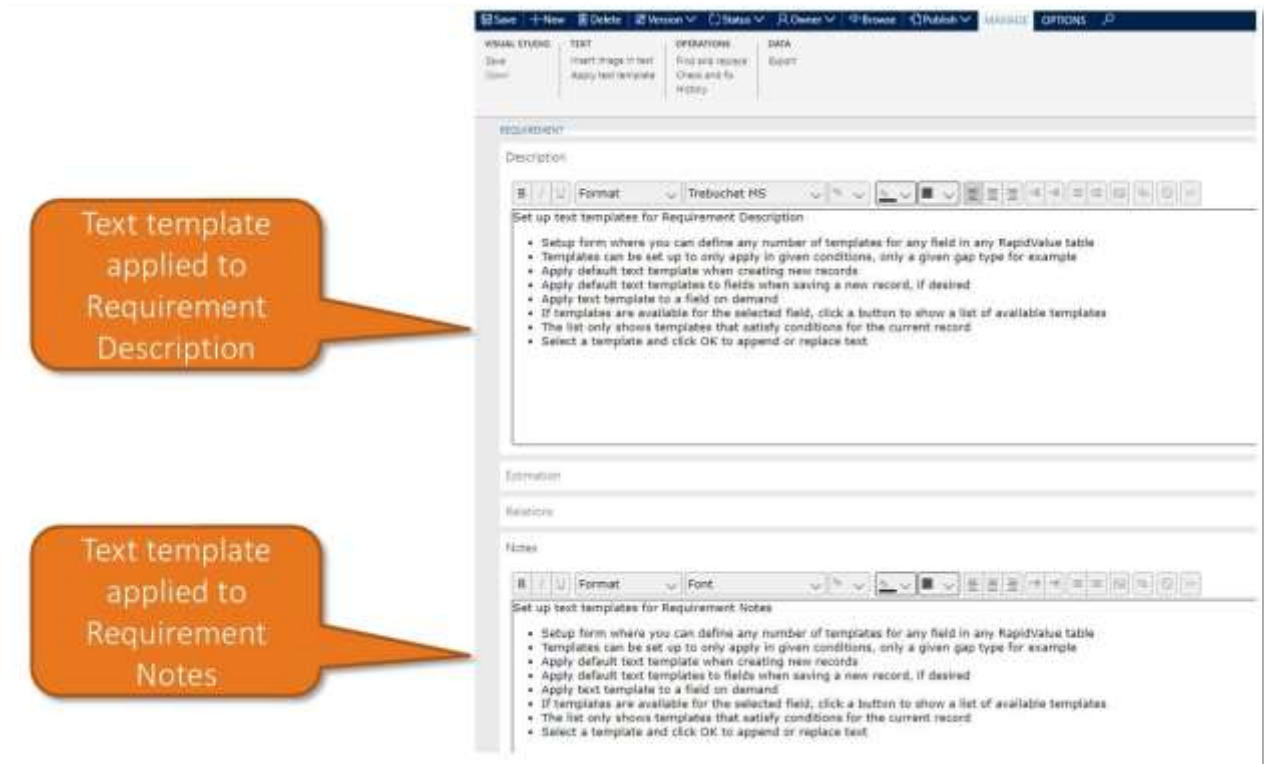
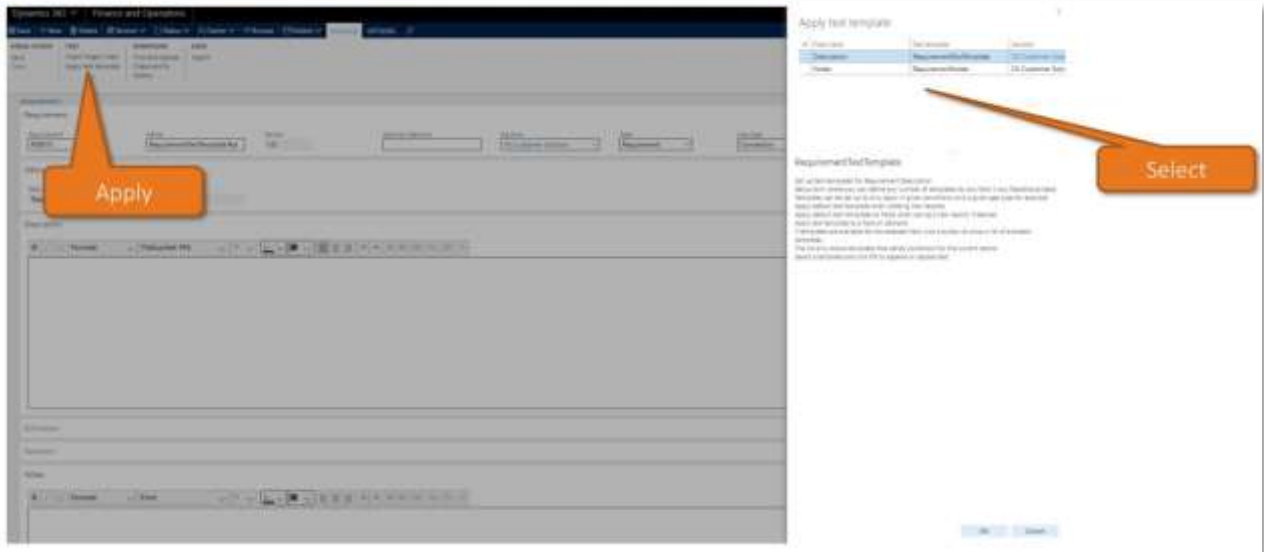


### Apply text template to a field on demand

- If templates are available for the selected field, click a button to show a list of available templates
- The list only shows templates that satisfy conditions for the current record

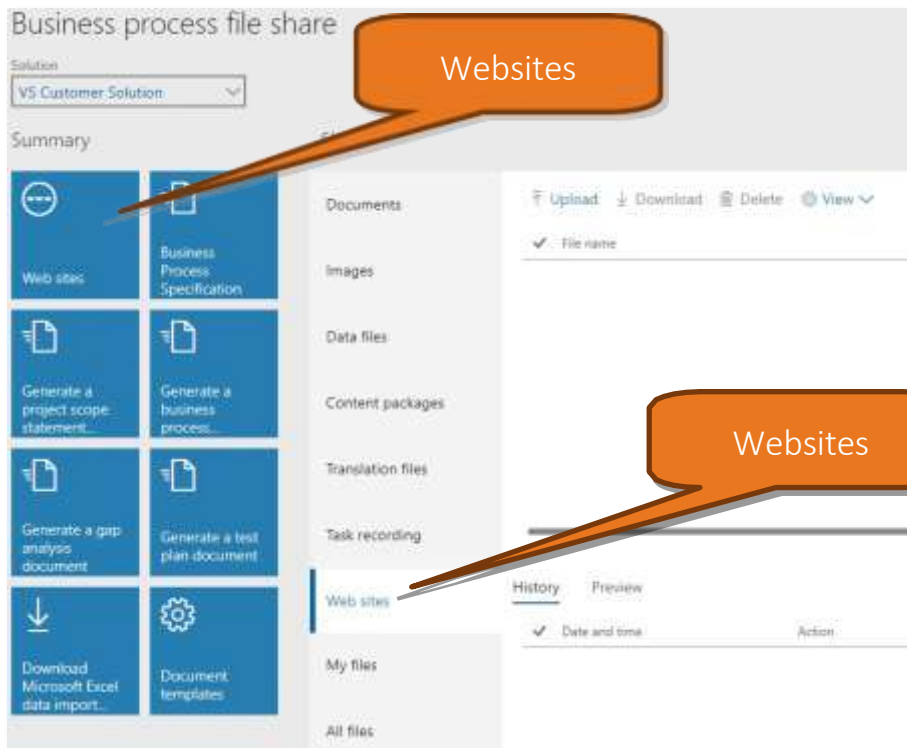


- Select a template and click OK to append or replace text

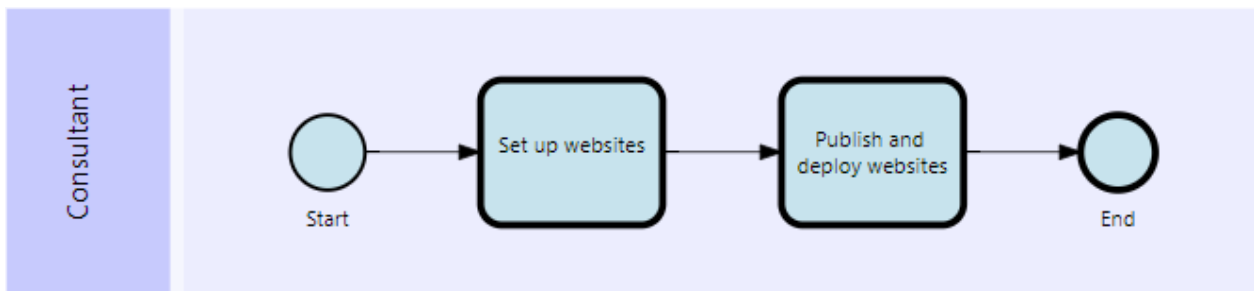


### 3.10 Ability to publish RapidValue content to website

Publish to website is a powerful aid in knowledge management and end user guidance. You can, for example, publish a solution as a website for review of your solution or as on-line user guidance for employees who do not have access to D 365 FOE. Summary of the feature is given below.



Overview of the whole process is captured in the flow below:



You can publish a website from RapidValue in which you can include your solutions or an already existing website. You can store a published website in several ways:

- RapidValue file share
- Local folder
- Azure file storage

#### Set up websites

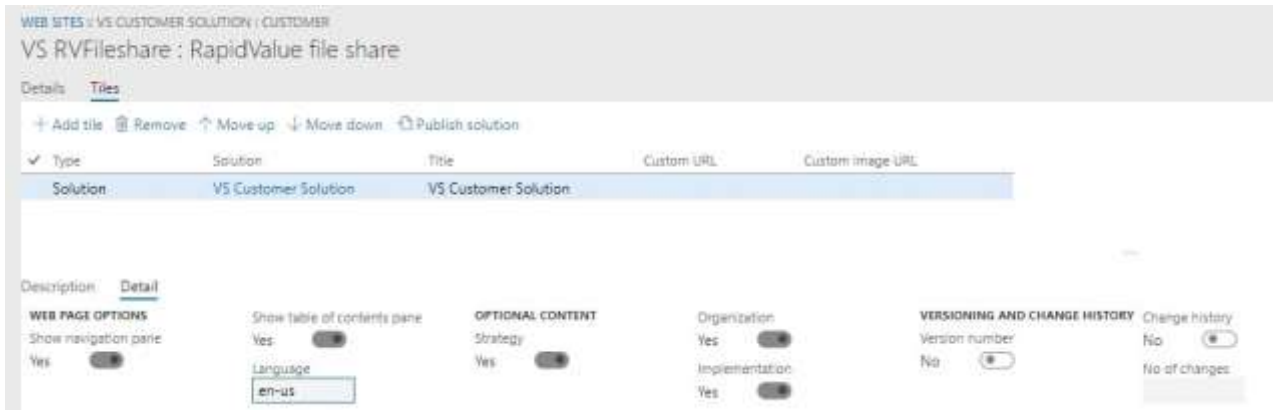
Before you publish a RapidValue solution as a website, you need to define the contents of the website and where you store it. You can store a published website in several ways: RapidValue file share, Local folder, and Azure file storage.

- RapidValue file share

You can define a website to be stored in the business process file share. On publish, files and folders are generated and stored in a temporary folder. When generation is finished:

- ✓ The files and folders are added to a ZIP file.
- ✓ The temporary folder with its contents is deleted.

- ✓ The ZIP file is stored on the Business process management workspace, on the All files tab. If you have only published a solution, the ZIP file is also stored on the Business process file share workspace, on the Websites tab.
- Local folder
  - ✓ You can define a website to be stored in a local folder. This local folder must be available on the server on which Dynamics 365 for Finance and Operations runs.
  - ✓ Before you publish the website, this folder must be manually created on the server. If you do not have access to this server, ask your administrator to create the folder.
- Azure file storage
  - ✓ You can define a website to be stored in Azure file storage. Before you publish the website, this folder must be manually created on the [Azure file storage](#).
- Define tiles of the website
  - ✓ Define solution tiles
  - ✓ Define custom tiles
- Customize resources
  - ✓ The resources define the layout of the website. So, these resources serve as a template for the look-and-feel of a website. You can apply resources in the standard way or customize the look and feel as well.



### Publish and deploy websites

You can publish a website from RapidValue in which you can include your solutions or an already existing website.

- Publish the whole website
  - ✓ You can publish a whole website. Both the title page and the defined tiles are included.
- Publish only the solution
  - ✓ You can publish a single solution to a website.
- Publish only the title page
  - ✓ You can publish only the title page to a website.

You can deploy the website from the location where you stored it.

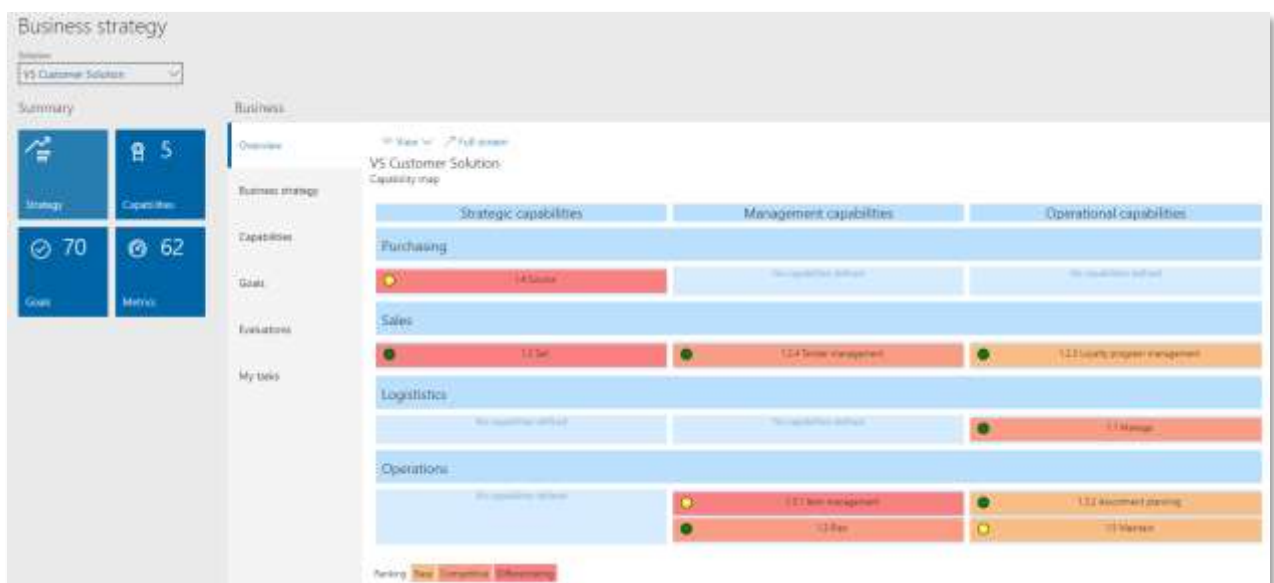
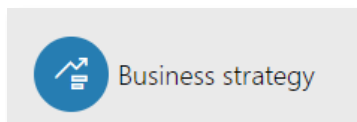


### 3.11 Utilizing the new Business Strategy Workspace

This release comes with a separate workspace for managing organization business strategy. The two key new features are Business model Canvas and Process Capability mapping. Both these are globally very popular tools for documenting business model and process capabilities respectively. These two features complement the already existing capabilities to define organization strategy, mission, goals, KPIs along with evaluations.

Summary of the feature is given below.

[Business strategy workspace](#)



Business model canvas

Business Model Canvas is a strategic management and lean startup template for developing new or documenting existing business models. It's used globally by people in companies of all sizes. You can use the business model canvas to describe, design and challenge your business model. It is a visual chart with elements describing an organization's or product's value proposition, key partners, key resources, key activities, customer segments, channels, customer relationships, cost structure and revenue streams. It assists firms in aligning their activities by exposing potential trade-offs.

**Summary**  
**VS Customer Solution general**

**Mission statement**  
 Be an accredited, trusted adviser that provides compliance and business continuity services and tools that supports CFO's and CIO's to reduce risks in their operations, by improving compliance and process excellence using expertise and technology to provide support in all stages of Governance, Risk mitigation and compliance in Retail, Food and manufacturing industries.

**Business model canvas**

<p><b>Key partners</b></p> <p>Depending on the setup (Build or borrow) we might need to team up with GRC expert such as EBY or Obtey and tie together service offerings. In the team up case we can focus more on GRC, innovation of technology rather than business consulting as that would be closer to our DNA. How ever as the market will grow to 7.38 Billion USD in 2020 according to Gartner , there surely is a business case for services as well.</p>	<p><b>Key activities</b></p> <p>Strategic GRC consulting to CIO and CFO. Offer GDPR and IT audits and follow through resolution consulting/tools. Offer ISO and QC process audits and consulting/tools. Offer vertical audits and HACCP and food safety (based on regulatory audit plans).</p> <p><b>Key resources</b></p> <p>Compliance officers, Risk managers, ISO and QC experts, Data Scientists, BI and ML experts, Membership of certified bodies.</p>	<p><b>Value proposition</b></p> <p>Provide compliance and business continuity consulting and tools that supports CFO's and CIO's to reduce risks in their operations, by improving compliance and process excellence using expertise and technology to provide support in all stages of Governance, Risk mitigation and compliance in Retail, Food and manufacturing industries.</p>	<p><b>Customer segments</b></p> <p>Retail, food and manufacturing are key priorities, other segments can be serviced based on more generic GRC services.</p> <p><b>Channels</b></p> <p>Direct to client, based on trusted relationship developed by established professionals.</p>	<p><b>Customer relationships</b></p> <p>Direct services to new or existing clients.</p>
<p><b>Cost structure</b></p> <p>Hiring and salary costs of key resources              Marketing costs              Cost of tools              Continuous development of GRC/CBC knowledge and membership costs with certified bodies.</p>		<p><b>Revenue streams</b></p> <p>The IRM/GRC solution market is forecast to grow at 13.4% CAGR to reach \$7.2 Billion by 2020, from \$3.9 billion in 2015. Technology strategic planners should leverage this document to understand how GRC/IRM solution market will evolve to successfully capture new and existing market opportunities. Considering our geography coverage and early entry in the services life-cycle, we should aim for a 0.01% market share, that can drive 7.1% of revenue in 2020.</p>		

Process capability map

Business users can now use the business process capability map to visualize the business processes of their organization as captured in the RapidValue solution and their associated capabilities, functional area, maturity level and impact on organization.



As a business user you can now refer to the RapidValue business process capability map to analyze the business processes on different dimensions. The map further highlights the capabilities as major, medium, and minor gaps (color coded buttons) based on the existing and target maturity levels. You can also navigate to a specific process capability to identify specific goals and KPIs, the performance of which is not up to your expectation and require attention. This helps in identifying the areas of concern and plan remedial actions.

### 1.2.1 Point of sale

Details Strategy Requirements Preview

Capability map

Type: Management | Rank: Competitive | Maturity level: Level 1 - Initial | Target maturity level: Level 5 - Optimizing

Goal map

+ Add | Remove | Move up | Move down

Goal	Metric	Notes
✓ Increase customer loyalty	Customer satisfaction	

Business processes can be characterized on the following dimensions:

1. Type: Type of concept or capability. Values are Strategic, Management and Operational.
2. Rank: Ranking with respect to company strategy and competitors. Values are Base, Competitive and Differentiating.

3. Initial and target Maturity level: Indicates how well the behaviors, practices and processes of an organization can reliable and sustainably produce the desired outcomes. Values are Initial, Repeatable, Defined, Managed and Optimizing.

4. Functional Areas: Organization functional areas of work. User defined values in RapidValue setup.

Organizations can extend this further and make productive use of this framework by assigning scores (if they feel the need for) to different types, ranks and maturity levels to calculate process capability scores.

## 4. Bug fixes

### 4.1 RapidValue BPM Suite 10.0.39.46

ID	Description
176144	Internal   Error while saving flow when user is in the element tab. <i>This issue is fixed now.</i>
183183	Internal   Observation while importing excel file template to RapidValue. <i>This issue is fixed now.</i>

### 4.2 RapidValue BPM Suite 10.0.38.45

ID	Description
125816	CS00163172   RV - Training Module Assignment Not Possible For >2 Users. <i>This issue is fixed now.</i>
166669	Internal   Translation of long text (Description / Introduction in activity) is getting translated partially. <i>This issue is fixed now.</i>
177292	Internal   Error while publishing business process specification document. <i>This issue is fixed now.</i>
180505	Internal   Structure/Solution is not getting created while importing excel file template. <i>This issue is fixed now.</i>

### 4.3 RapidValue BPM Suite 10.0.36.44

ID	Description
175278	CS00226786   RV import dropping requirements. <i>This issue is fixed now.</i>

### 4.4 RapidValue BPM Suite 10.0.34.43

ID	Description
167754	Internal   Translations are not getting imported when imported any solution into different environment. <i>This issue is fixed now.</i>
150952	Internal   ID- Normal text is not honoring the text format specified in Document template & inconsistency in parameter fonts. <i>This issue is fixed now.</i>



## 4.5 RapidValue BPM Suite 10.0.32.42

ID	Description
166513	CS00224079   RV Solution While Copy solution creates 5x more processes in target solution. <i>This issue is fixed now.</i>
167162	CS00224645   RV Solution No records are imported from Rapid Value rvdata-file with selective import. <i>This issue is fixed now.</i>

## 4.6 RapidValue BPM Suite 10.0.31.41

ID	Description
115345	CS00177705   RV Solution While sync requirement to DevOps, its throwing runtime error but able to sync requirement to DevOps. <i>This issue is fixed now.</i>

## 4.7 RapidValue BPM Suite 10.0.30.40

ID	Description
160812	CS00223185   RV Solution Batch Import Fail The process cannot access the file <i>The solution import into another environment is not possible as the Import Batch job keeps throwing the following error. The issue is fixed, the import is successful.</i>

## 4.8 RapidValue BPM Suite 10.0.29.39

ID	Description
155450	CS00222901  Solutions export files does not contain information about relations between requirements and business processes <i>Relations are not getting transferred along with requirements when a solution is exported, which got fixed</i>

## 4.9 RapidValue BPM Suite 10.0.29.38

ID	Description
130060	CS00183458   Business Strategy Tiles - Not Linked To Selected Solution <i>Dashboard Tiles in Business strategy page were not getting updated earlier when we change solution, now they are getting updated w.r.t solution</i>
140438	Internal   HTML editor in RV <i>Issue with Video links in new HTML editor got fixed</i>
143113	CS00215266   Unable to transfer RapidValue data from one environment to another <i>Data transfer/import from different environment through connection configuration is working now</i>
149546	Internal   List of Feedback page is getting displayed instead of New Feedback page <i>Feedback page is getting displayed now</i>
149649	Internal   Business Strategy info is not getting displayed when clicked on Tile <i>When clicked on Strategy tile in dashboard now the correct info is getting displayed</i>
151402	Internal   Error message is getting displayed when syncing Business process from RV to DevOps <i>When clicked on synchronize option in RV error message used to get displayed, which is fixed now.</i>

## 4.10 RapidValue BPM Suite 10.0.26.37

ID	Description
144069	CS00218364   Copying RV Solution fails due to Exercise Translations

## 4.10 RapidValue BPM Suite 10.0.25.36

ID	Description
140438	Internal   Style of table in text applied
139822	CS00206688 Direct link changed from details to preview page
139823	CS00206687 Authorization setup for direct link to business processes and requirements
121164	CS00154470   Exercise Activity Displays Translations
121185	CS00153892   RV Task Recordings - Opening Page
121168	CS00154468   RV Exercise report did not show translated exercises / exercise activities
129541	CS00160793   Module / Lesson List Doesn't Display Translation

## 4.11 RapidValue BPM Suite 10.0.24.35

ID	Description
140436	Internal   Docs website – GDPR issue: Google Analytics

## 4.12 RapidValue BPM Suite 10.0.23.34

ID	Description
137742	CS00198176   Import of Solution does not contain the translations
137950	CS00199863   RapidValue translations

## 4.13 RapidValue BPM Suite 10.0.22.33

ID	Description
133454	CS00190800   Unable to Link to RV Process diagram
128029	CS00177647   Extract/Copy Requirements
131171	CS00186982   Copying a process from one solution to another solution shows up error while pasting
131914	CS00189165   RV Import - Performance Issues (Again)Essentra
134068	Search Functionality Improved

## 4.14 RapidValue BPM Suite 10.0.22.32

ID	Description
31914	CS00189165   RV Import - Performance Issues & Import batch job added
131307	CS00187275   RV DevOps - Task Template Not Working

## 4.15 RapidValue BPM Suite 10.0.21.31

ID	Description
125098	CS00164496   RV - "Global" Solution Being Created on Solution Import (part2)
129565	CS00182928   Solution Consolidation - Does Not Complete and Times Out (No Batch)
128432	Delete a solution is throwing runtime error (internal defect)
127663	CS00177052   Rapid Value copy failed
129359	CS00177364   TI RV - Solution Export / Import Time Is Excessive (performance issues)

## 4.16 RapidValue BPM Suite 10.0.16.2

ID	Description
124231	CS00162971   RV - Solution Import Batch Job "Ended" Status Despite Having Errors
128305	CS00178889   Unable to Export RV Solution - Unhandled Error
125098	CS00164496   RV - "Global" Solution Being Created on Solution Import

## 4.17 RapidValue BPM Suite 10.0.16.1

ID	Description
99962	CS00102751   Unable to Delete Solution - Dependent Trainee Exercises
119595	CS00148680   RV Published Website Doesn't Display Solution Translations (Part2)
123960	CS00162281   RV Solution Deletion Not Possible - Requires Periodic (Batch) Solution
126409	CS00163762   RV - Solution Export / Import Requires Usage Data Clearing
120674	CS00150630   Unable to export RV solutions in batch mode
123863	CS00162228   RV Solution Move - Warning Messages when Importing
125093	CS00160790   Training Modules Show 1 Record for Each Translation
124584	CS00165213   RV - Feedback Not Associated to Trainee Exercise After Solution Move

## 4.18 RapidValue BPM Suite 10.0.1.27

ID	Description
124247	CS00164248   RV - Task Guides Not Linked To Training Exercise Activity After Solution Move

## 4.19 RapidValue BPM Suite 10.0.1.26

ID	Description
124012	CS00162969 Trainee exercise parent changed to Exercise

## 4.20 RapidValue BPM Suite 10.0.1.25

ID	Description
	Multiple errors solved

## 4.21 RapidValue BPM Suite 10.0.1.24

ID	Description
119492	1. CS00150361 RV Training Module Not Using Task Guide Recording Steps For Exercise Activities

## 4.22 RapidValue BPM Suite 10.0.1.23

ID	Description
<b>105471</b>	2. RapidValue and Azure DevOps data can be synchronized in both directions. However, this synchronization needs to be triggered in a manual way. To make sure both systems are in sync, a near real-time synchronization is required. 3. The current synchronization needs a manual authorization step which expires after a couple of hours. This needs to be changed so that the manual step will be eliminated. Also enabling MFA support requires exactly the same modification.
<b>117960</b>	CS00146698 RV Training Translation - Not Automatic Despite Selecting "Google Translate"
<b>117961</b>	CS00146700 RV Training Translation - Not Cascading Through Associated Records
<b>112196</b>	CS00136499 Invalid JSON primitive error on Synchronizing work items to Azure DevOps
<b>116738</b>	CS00146620 Sync to Azure DevOps does not work if you change name on WP or WPG after sync

## 4.23 RapidValue BPM Suite 10.1.1.22

ID	Description
110588	CS00134312: Cannot Map "Area" field to Azure DevOps

## 4.24 RapidValue BPM Suite 10.0.1.21

ID	Description
105289	CS00119748: RV will no longer sync to DevOps
100272	CS00110714: Click on the Status of the exercises chart is throwing run time error.
101046	CS00118862: Security Role Mapping Displaying AOT Name, Not Label

## 4.25 RapidValue BPM Suite 10.0.1.20

ID	Description
99532	CS00105849: RV security privilege not allowing read only rights.
	This release is replacement for Release 10.0.1.19 as that had some model naming issue.

## 4.26 RapidValue BPM Suite 10.0.1.19

ID	Description
99532	CS00105849: RV security privilege not allowing read only rights.

## 4.27 RapidValue BPM Suite 10.0.1.18

ID	Description
<b>98760</b>	CS00105418: Ability to add "7 new statuses "on RV requirements to better manage workflow between RapidValue and Azure Dev Ops.
100497	CS00109881: Enabling Multiple Selection on Exercise Report in Training Module

## 4.28 RapidValue BPM Suite 10.0.1.17

ID	Description
99204	Internal Issue: Preview is not getting updated automatically when I assign a flow to a process (When refresh preview is set off under parameters). Fixed an issue with the bug fixes done to solve Refresh Issue in previous 10.0.1.16 release.

## 4.29 RapidValue BPM Suite 10.0.1.16

ID	Description
95032	CS00093992: My Training Rapid Value screen status error(Refresh Issue)
<b>98952</b>	CS00103613 Flow is incorrect and the preview in the business process is correct.

## 4.30 RapidValue BPM Suite 10.0.1.15

ID	Description
95032	CS00090528 Guide Workspace - Responsible for hyperlink error
93215	CS00092514 Requirement link; Search filter in requirements page always open the first searched results.
93502	CS00094556 Change history form ; In the change history form few listed fields are editable
87660	CS00084075 Whenever I create a new test run underneath a test suite, the overlying table of test suites refreshes my selection of test suite.
76663	CS00068764 Scroll issue in Flow designer – Need to scroll up every time to access the designer menu.
76337	TI-13291-Z1X1 Need to see how to depict the “Sub processes “ in a test run

## 4.31 RapidValue BPM Suite 10.0.1.14

ID	Description
<b>Feature 90376</b>	You can now apply a filter to business process hierarchies across different workspaces to only show the business processes that meet the defined conditions.

## 4.32 RapidValue BPM Suite 10.0.1.13

ID	Description
93044	CS00090394: (XCOAL) Remote Task recording setup.

## 4.33 RapidValue BPM Suite 10.0.1.12

ID	Description
<b>Feature XXXXX</b>	“Due Date” and “Moscow” fields added in Requirements Table.
<b>Feature XXXXX</b>	Publish “Gap analysis” and “Process specification” document enhancements. Ability to exclude scenarios and status based document generation now possible with this release.

## 4.34 RapidValue BPM Suite 10.0.1.11

ID	Description
<b>Feature 78027</b>	The feedback feature enables users to provide comments and notes to a record in RapidValue from within a published website. As soon as the feedback is provided, the owner of the solution or website tile receives an email with details regarding the feedback. The owner can then review the comments provided and take appropriate action.

## 4.35 RapidValue BPM Suite 10.0.1.10

ID	Description
<b>84335</b>	CS00073805: Rapid Value - connection issue.
<b>87648</b>	CS00083659 Error when attempting to play task guide from Scope definition.
<b>87650</b>	CS00084064: Export task recording from Test cases form (.xml) task guides.
<b>87652</b>	CS00084065: Refresh issue after deleting a xml file (when zero bytes).
<b>87656</b>	CS00084066 Uploading xml task guides for test cases is not working

## 4.36 RapidValue BPM Suite 10.0.1.9

ID	Description
82809	CS00071702-Dev Ops (VSTS) BPH "Status" Outbound DevOps business process status sync process is not consistent

## 4.37 RapidValue BPM Suite 10.0.1.8

ID	Description
81470	CS00072070- SAT Environment issue
80914	CS00072232- Cannot publish a Test plan from RV, getting an error

## 4.38 RapidValue BPM Suite 10.0.1.6

ID	Description
74878	CS00071584- Cant upload image to Application in RV TI-13286-Y9Z7
76312	CS00068011- Error while copying a solution through wizard
78292	CS00069897 - VSTS Reference to be updated To Azure Dev Ops?

## 4.39 RapidValue BPM Suite 10.0.1.5

ID	Description
68649	TI-12322-Z0Z3 - Performance: RapidValue.
76633	CS00061760- Publish solution to web should not have the link to To-Increase included
76519	CS00061337- Publishing a website from RV, the exported package contains the index page as 'Index.html' with capital I
74878	TI-13286-Y9Z7- Cant upload image to Application in RV
74803	TI-13327-Q5Q3- RV Process flow 'error' event not displaying correctly in preview
75866	CS00067826 - Need is for having two more fields in the Requirements Relations View to extract Description and Notes which are important

## 4.40 RapidValue BPM Suite 10.0.1.4

ID	Description
67807	TI-13301-V0G4 - Incorrect requirement details are shown.
73222	TI-13178-H1R9 - Linking tasks to a solution.

## 4.41 RapidValue BPM Suite 10.0.1.3

ID	Description
72837	TI-13135-V7H2 - Help feature status on bug – demo.
73181	TI-13117-P3F5 - Error with sync between RV and ADO.
73374	TI-13209-D2X1 - RV Task list refresh issue.
73485	TI-13172-X9B6 - RV Ledger journal Scenario issue.

## 4.42 RapidValue BPM Suite 10.0.1.1

ID	Description
71995	TI-13010-Y5T4 - Unable to see translations for activities in Business process hierarchy.
Col-UK	Headings in business process specification document improved

## 4.43 RapidValue BPM Suite 1707.8.1

This is the first release of RapidValue BPM suite for Microsoft Dynamics 365 for Finance and Operations, Enterprise edition, July update 2017 with platform update 8 or later. The code base is identical to the RapidValue BPM suite 1611.4.7.1 for Microsoft Dynamics 365 for Operations 1611 release with platform update 4. Please refer to release notes for RapidValue BPM suite 1611.4.7.1 for details on bug fix history.

## 4.44 RapidValue BPM Suite 1611.4.7 and earlier

This is the last planned update for RapidValue BPM Suite for Microsoft Dynamics 365 for Operations 1611 release. Note that future updates for the 1611 application release will only ship on demand to address critical bugs or mandatory platform updates.



## 5. Known issues

ID	Description
18474	Tiles in My business processes workspace don't filter detail forms to correct set of records.
19349	Horizontal scroll bar in Views (Goal maps etc.) missing.
19647	Configure copy solution is taking lot of time.
23153	Trying to import a solution file is consuming lot of time while analyzing.
23165	Click on the New window in the Flow designer is not showing the designer area.
23784	Organizations tile is not showing the record count in the Modeling workspace.
24217	Data entities support viewing but not always editing in Excel
24221	Import or export of data files over 2GB require server file access which is restricted to Microsoft on a production environment.
24222	Exporting data files over 2GB may result in error but file is created in C:\Windows\Temp folder and can be used from there.
29044	Excel data entry template can only be downloaded by system administrator

## 6. Disclaimer

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via To-Increase support.