Experlogix Smart Flows Release Preview Guide

Version 4.22

July 2024

The Experlogix Product Team is excited to announce the general availability of Smart Flows 4.22.

The new version of Experlogix Smart Flows, our intuitive yet comprehensive platform to generate your business documents and automate your document flows, has a deeper integration into Experlogix Documents (formerly known as project "Great White Shark"), our next-generation platform for document automation. It provides regular users with an optimized mobile experience for flow executions and gives administrators better tools to manage the lifecycle of users.

Project "Great White Shark" is now Experlogix Documents. In addition to a new name, it has a new AI Assistant to help build forms and a brand-new application area, Content Manager, to store and manage content. Content Manager goes beyond what you would expect from a content management application:
- AI-powered translation localizes your content with unprecedented accuracy
- Sharing capabilities let you manage external access to your content
- Online co-authoring allows you to collaborate on content across your organization.

Smart Flows 4.22 integrates with Content Manager on Experlogix Documents to let you store and retrieve content in flows and templates.

To celebrate the introduction of Experlogix Documents, the buttons and controls in our connected apps for Microsoft Dynamics 365 CE, Microsoft Dynamics 365 F&O, Salesforce.com, and Sugar have been renamed and rebranded. The restyled Flow Execution Panel has been **optimized for mobile** devices.

Experlogix is optimizing user management across all products. Smart Flows 4.22 contains the first of a series of adjustments in that area. **User lifecycle management optimizations** in this release include an improved user table and the capability to transfer dependencies from one user to another.

As always, the new Smart Flows release contains more minor improvements, optimizations, and fixes that reduce the complexity of automating your document flows so you can generate better documents faster.

From all of us here at Experlogix, happy templating!

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Introducing "Experlogix Documents"

Experlogix proudly announces that Project "Great White Shark" has been officially named "**Experlogix Documents".** The name reflects Experlogix's focus on your documents and our commitment to making you better and faster at handling document-centric business processes. Experlogix Documents is our next-generation document automation cloud solution. It automates your outbound flows to generate, personalize, optimize, and deliver outgoing documents and forms. It also streamlines your inbound flows to process, classify, store, retrieve, and interpret incoming documents, all with a focus on data-to-value conversion.

While Experlogix Documents is built as a comprehensive document platform, it is also a self-service solution. You can configure it, integrate it and go live in a matter of days, rather than months. The platform is built to empower your business users to take ownership of their document templates, forms, and flows. It leverages artificial intelligence to assist in completing design tasks with unseen speed and accuracy.

Experlogix Documents is an enterprise-grade SaaS solution. It powers personalization at scale on the outbound side and fuels doc-to-data processing at scale on the inbound side. It is built to be secure and resilient.

In Experlogix Smart Flows 4.22, the "Project Great White Shark" Preview plugin is rebranded as Experlogix Documents. The preview flag has been lifted, meaning backwards compatibility is guaranteed and we no longer advise against using the plugin for production purposes. In upcoming releases, more and more capabilities of Experlogix Documents will become available for you as a Smart Flows administrator, designer or user.

Figure 1 – Login screen of Experlogix Documents

Introducing AI Assistant for Form Data Sets on Experlogix Documents

Experlogix Documents offers an artificial intelligence-powered assistant to help you build form data sets. The assistant suggests and accepts natural language prompts and has been trained to answer all prompts with an updated form data set schema, which you can preview and apply.

Send it prompts such as:

- Build an event registration form.
- Mark all fields on this form as required.
- Add an Address - State dropdown field with all U.S. states as options.
- Add a series of checkbox fields with common dietary restrictions and show an "Other" option. When selected, add a text field to specify.
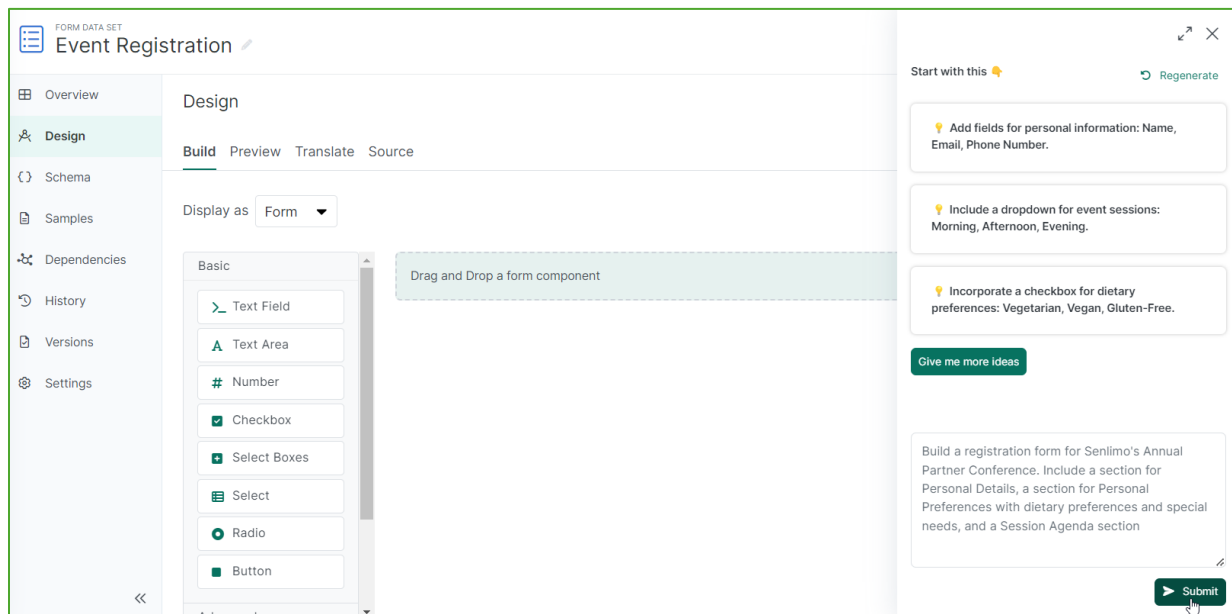- Show different sections of the form as tabs …

Figure 2 – Using the AI Assistant to build a form in Experlogix Documents

The AI Assistant has the potential to save you time as a form designer. It also familiarizes you with the different types of form components and their configurations. In the beta stage, the assistant helped build forms in a few minutes, which would have taken more than an hour manually.

Introducing Content Manager for Experlogix Documents

Experlogix Documents (aka Project "Great White Shark") now has two application areas: Data Sets and Content. The Content area has been designed to manage your project's content. Content items are typically assets you would like to use in the documents you generate and/or the generated documents themselves.

Just like any other file management system, Experlogix Documents Content Manager lets you organize your content in folders and nested folders. You can upload, move, copy & paste, and perform all the typical operations you would expect from a file manager.
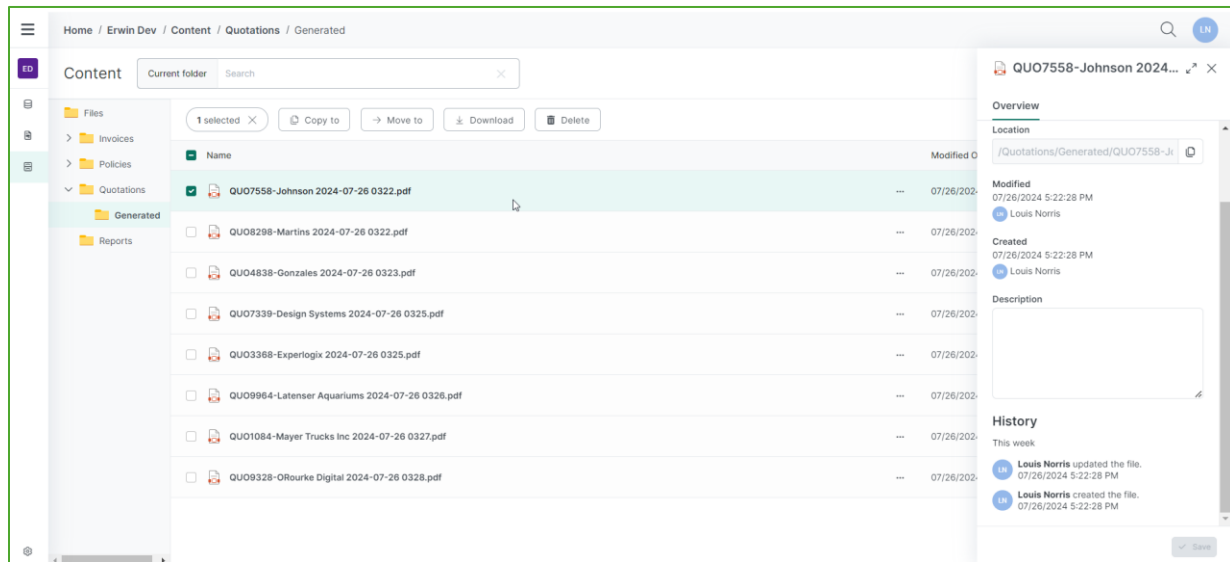

Figure 3 – General view of Content Manager on Experlogix Documents

Managed Sharing Outside of Your Organization

For the files in Content Manager, you can create links to share them outside of your organization. These external share links give people access to the content you want to share, even if they are not users on your project. A share can contain links to view the content of a file in a browser and download the shared content. If the shared content is in a format that cannot be viewed in a browser (e.g., a ZIP archive), it will be downloadable via the provided link. You can set an optional expiration date for content sharing. After this expiration date, the links to this share will no longer be available.
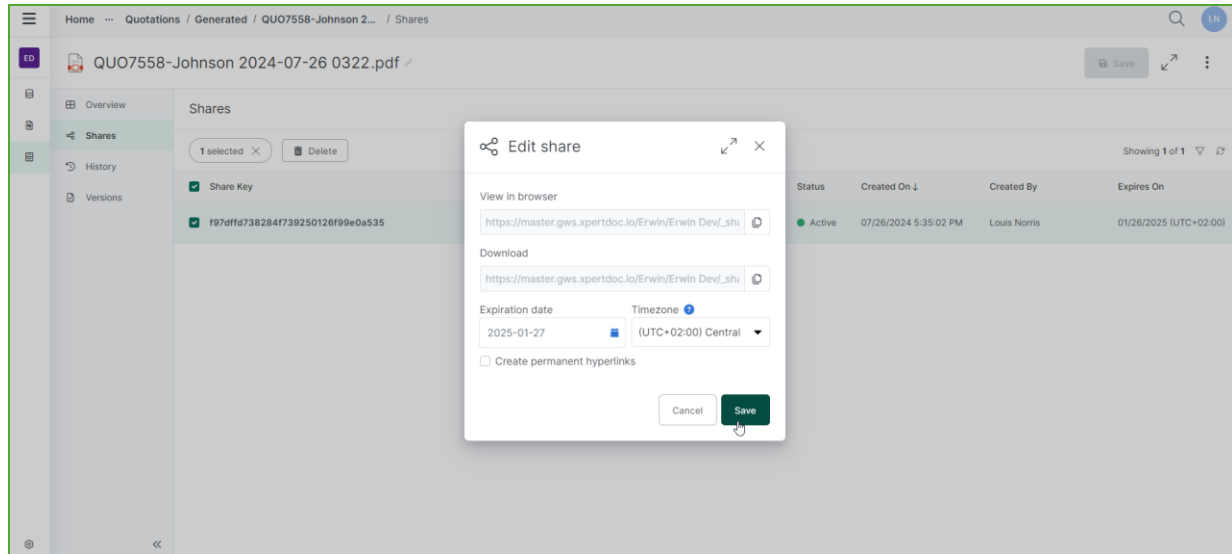
Figure 4 – View of the Share section in Content Manager

AI-powered Translation

Content Manager also has a new translation feature that uses artificial intelligence to translate content stored in Content Manager. The translation service supports around 100 sources and target languages. Thanks to artificial intelligence, the quality of the provided translations is superior to that of non-AI-powered auto-translation services. The AI model has a more profound understanding of the semantic context of a piece of content that needs to be translated.
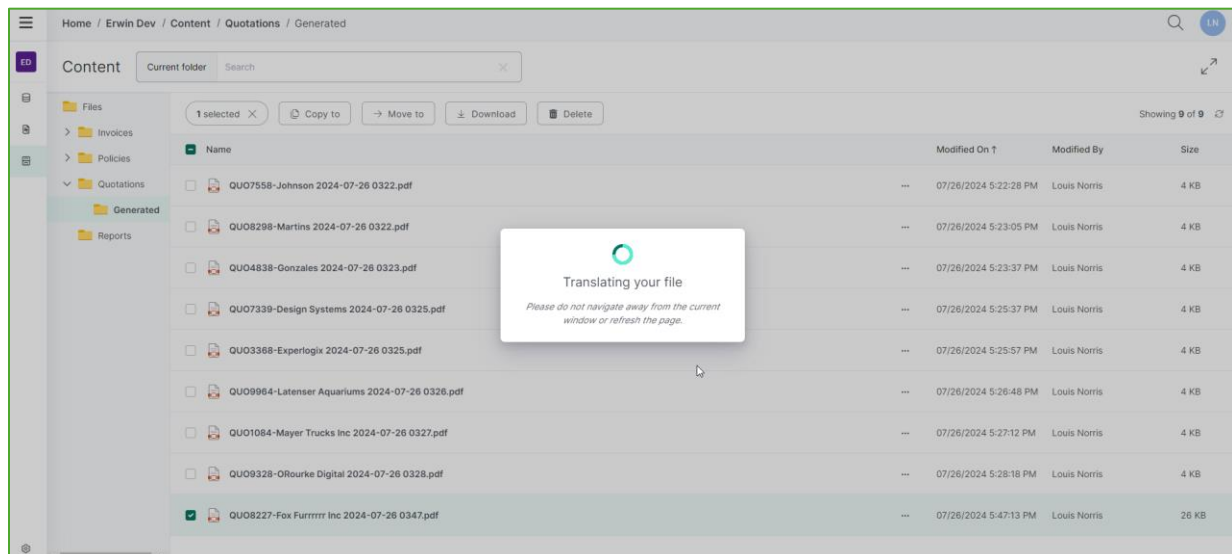

Figure 5 – View of AI-powered translation capabilities of Content Manager on Experlogix Documents

Online Editing and Collaboration on Microsoft 365 (Office) Files

Experlogix Documents Content Manager integrates with Microsoft 365 for the web through Microsoft's Web Application Open Platform Interface (WOPI). This allows you to open and edit Office files stored in Content Manager with the browser versions of Microsoft Excel, PowerPoint, and Word. The integration with Microsoft 365, formerly known as Office for the web, supports autosave and simultaneous co-authoring of the documents, spreadsheets, and presentations you store in Content Manager.

Smart Flows Integration with Content Manager

The 4.22 release of Smart Flows integrates seamlessly with Content Manager on Experlogix Documents. The Experlogix Documents plugin has a step to Store a Document in Content Manager. The step returns hyperlinks to download or edit it and open the folder containing the stored document.

All capabilities of Flow Builder and Template Builder that accept a document path as input have also been updated to support Content Manager as a source of that document path. For instance, in Template Builder 4.22, you can insert a document or an image from Content Manager and maintain its formatting. In Flow Builder, you can, for instance, point to a Content Manager file path in a Fetch Document step.
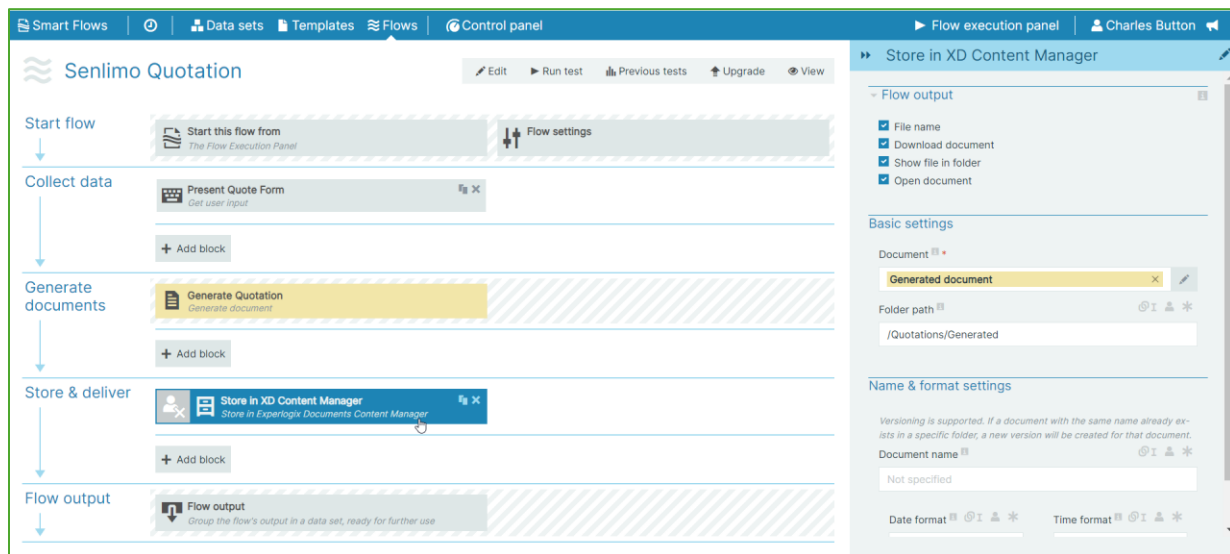

Figure 6 – View of a flow that stores a generated document in Content Manager on Experlogix Documents

Flow Execution Panel Optimizations

Updated Look for Flow Execution Buttons

To start a flow execution from within a CRM or ERP system, Experlogix provides a series of plug-and-play apps. In the 4.22 version, the flow execution command buttons have been renamed "Experlogix Documents" or simply "Documents" if an Experlogix branded icon precedes them.
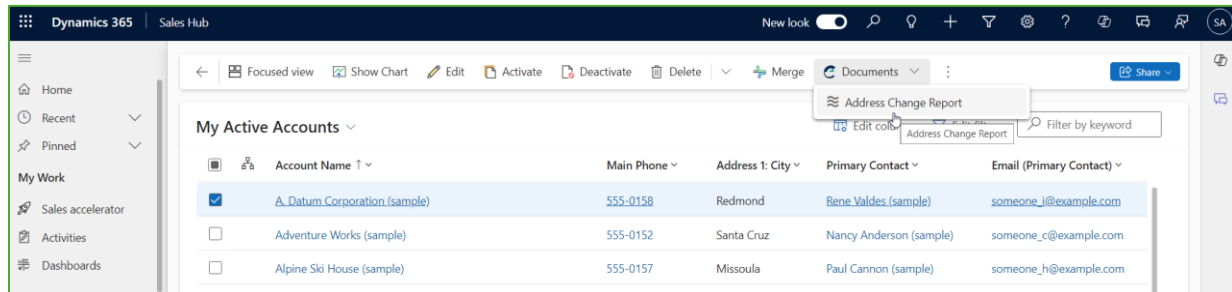

Figure 7 – Updated flow execution buttons in the connected apps

Responsive Design

Flow Execution Panel, which has already been redesigned to reflect the future direction of application design, has been optimized for mobile experiences. Generating documents on your phone just became better and faster.
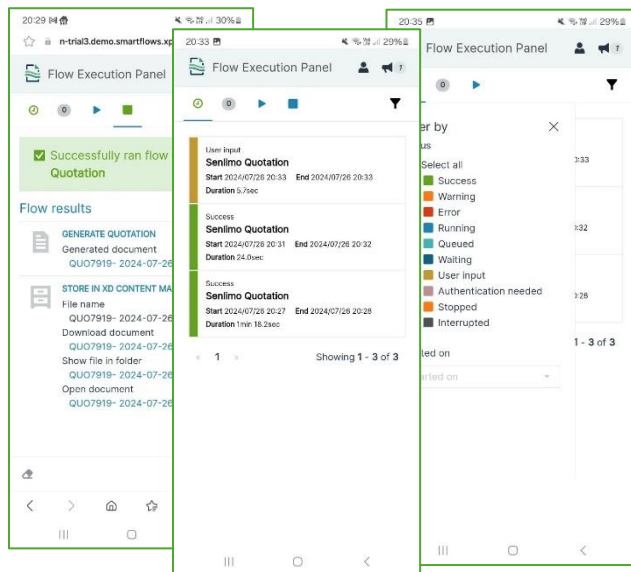

Figure 8 – Views of the Flow Execution Panel optimized for mobile

User Lifecycle Management

Experlogix Smart Flows 4.22 has optimized user lifecycle management. There are changes in the user table; and you can now transfer dependencies from one user to another before you delete a user.

User Table Changes

The user table in the control panel no longer has tabs for native, connected, and system users. Instead, an icon differentiates **regular users** from **system users**. The Type filter column of the optimized table indicates from which connector(s) users are synced.

Regular users have a state. They are either active, deactivated, or deleted.

- **Active users** can log into Smart Flows and perform all actions for which they have permissions. They are marked with a green user icon in the user table.
- **Deactivated users** can no longer log into Smart Flows; they still have their permissions but are prevented from logging in. A grey user icon in the user table marks them. You can deactivate an active user by clicking the Deactivate button in the control bar of the user table. Once deactivated, you can re-activate a user.
- **Deleted users** can no longer log into the system and lose all their permissions. If a deleted user has no dependencies in the system at the time of deletion, it is removed from the user table. If it has dependencies, it will still be in the table, marked with a red user icon.

Figure 9 – View of the optimized user table in the Control Panel of the Smart Flows Project Console

Transferring User Dependencies

When deleting a user, the system will check if the user has dependencies, such as flows, templates, data sets, or flow executions, that are assigned to the user. When there are dependencies, you can transfer these to a different user. If you skip this step during the deletion process, you can navigate to the deleted user's detail view later and use the Transfer option on the Dependencies tab.

The changes in the user classification and the possibility of transferring dependencies are particularly helpful if your Smart Flows project contains duplicate users. In previous versions of Smart Flows, the same physical person could have both a native and a synched user on the project. In version 4.22, you can optimize the system by deleting the native users and transferring their dependencies to the corresponding synced user. This way, you can optimize the user's experience and rationalize license consumption.
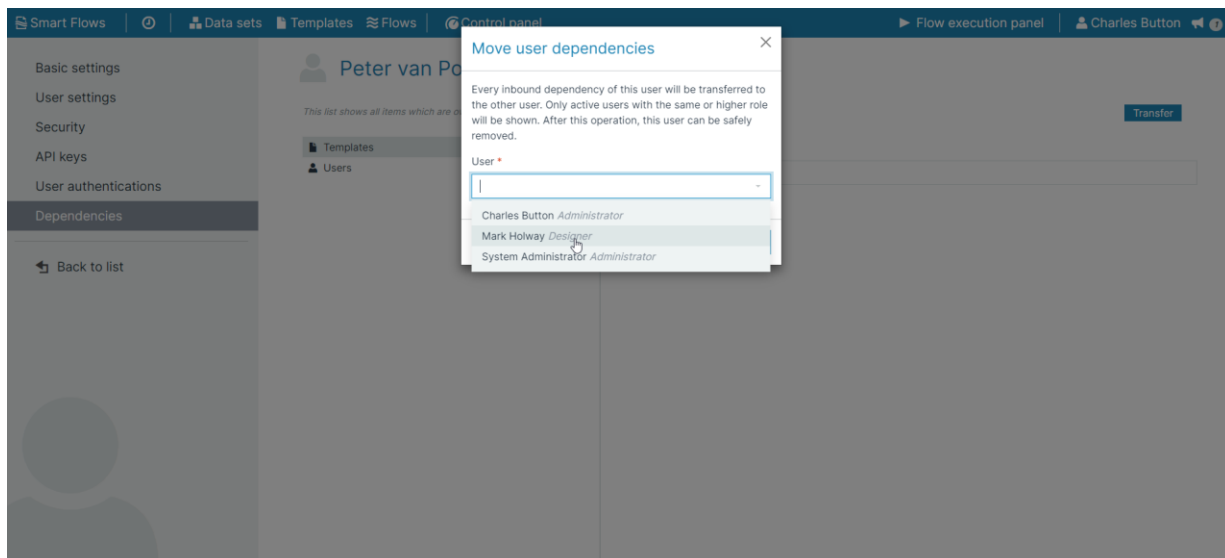

Figure 10 – Transferring dependencies from one user to another in Smart Flows 4.22

Minor Improvements

As always, a new Smart Flows release brings minor improvements and quality-of-life upgrades. We are happy to list some of those included in the 4.22 release.

- **Optimizations to the Microsoft Dynamics 365 CE plugin**. You can now select the pattern for data collection (FetchXML or OData) at the data set level instead of at the plugin level. Furthermore, the Update Record flow block has been improved, so option set fields in Microsoft Dynamics 365 CE are prepopulated with all available option set labels. You can set these labels as a valid input for option set fields, or you can set the real numerical value of the option.

- **Create samples when testing a flow in Flow Builder**. Have you ever tested a flow you were building only to discover that your data sets do not have all the samples you needed for your test cases? In Smart Flows 4.22, you can create samples in the context of Flow Builder's test panel. This is handy because it saves you the hassle of switching between the Data Set and Flow Builder screens.
- **Improved tree view for Form Data Sets.** Experlogix Documents form data sets now show both display names and schema names in their corresponding tree views in the Smart Flows Data Set Builder and in Template Builder.
- **Output data sets are skipped by the instant clean-up service.** The instant clean-up service, which removes all data and documents from Smart Flows after a successful flow execution, no longer clears the output data sets that your flows produce. Instant clean-up is a great help to optimize system performance and maximize security. Now, you can use it in combination with output data sets to pass the output of a flow execution to a subsequent action or process.
- **Various performance updates.** The 4.22 release includes a variety of performance updates. The main focus areas for performance optimizations in this release have been metadata caching for plugins and optimization of compilation time for complex standard and composition templates.

Release Notes and Release Artifacts

Comprehensive release notes and an overview of downloadable release artifacts are available through the Experlogix knowledge base.

Experlogix Smart Flows 4.22 Release Notes
Experlogix Smart Flows 4.22 Release Artifacts

About Experlogix

Experlogix solutions simplify and humanize the most complex products and processes to unlock workflow velocity and create a better customer experience. Experlogix Design Center makes configuration and other processes faster than you ever thought possible and more straightforward than you dared to imagine. Experlogix Document Automation simplifies and optimizes even the most complex document processes for companies worldwide in any industry. Experlogix is a global company headquartered in Salt Lake City, with European headquarters in Veenendaal, Netherlands. We are online at www.experlogix.com.