



Experlogix Smart Flows 4.15 Release Preview Guide

This Release Preview Guide contains highlights that are expected to be included in the next minor release of Experlogix Smart Flows. It is not meant to be complete, nor does it guarantee that all the listed items will be fully implemented.

Introduction

Experlogix is excited to announce the release of Experlogix Smart Flows 4.15 in November 2022. Experlogix Smart Flows continues to simplify the most complex document automation challenges by empowering business users to generate and deliver better documents faster.

The Experlogix Smart Flows 4.15 release focuses on optimization!

Analyze and optimize data sets to ensure they contain all the dependent fields your templates and flows need with no unnecessary fluff. Retrieve data from host systems leaner and faster by eliminating all unused fields and relationships from your data sets. Template design is also easier due to fewer fields populating the data set tree.

This release allows you to pre-compile the templates of your flows and optimize the time to execute flows. This keeps your complex templates, compositions, and templates with many language variants ready via cached memory, allowing for quick and seamless merges.

The Experlogix Smart Flows 4.15 release contains optimizations in many other areas, such as language management, security, and user experience. And... *Il y a aussi de bonnes nouvelles pour les utilisateurs francophones d'Experlogix Smart Flows, car Template Builder 4.15 est désormais également disponible en français.* That's right; Template Builder now detects the interface language setting of Microsoft Word. If that is French on your local PC, the Template Builder add-in automatically loads in French instead of English.

From all of us here at Experlogix, we wish you happy templating, and should you need support, please [reach out](#) to our team!

Contents

Optimizations for Faster Flow Execution 3

 Pre-compilation of Templates 3

 Data Set Analysis and Optimization 4

 Compilation Time Warnings..... 6

Template Builder in French 7

Minor Improvements..... 8

About Experlogix..... 8

Optimizations for Faster Flow Execution

With every release, our goal is to create features that maximize flow execution, speed, and performance. In this release of Experlogix Smart Flows, two new features upgrade flow execution performance to a new level.

Pre-compilation of Templates

The new Pre-Compile feature on the Flow details page allows you to select some or all of the templates in a flow and quickly pre-compile them. Smart Flows then stores the complied version in cached memory ensuring it is ready to use when a flow is executed.

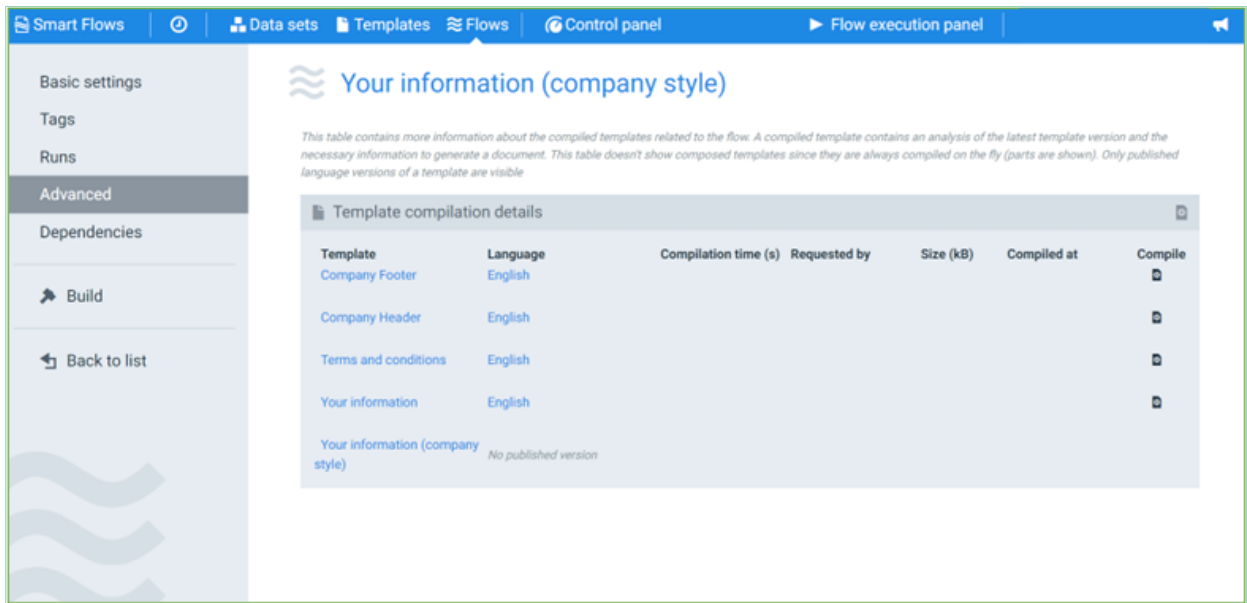


Figure 1 Pre-compilation of templates in the [Advanced](#) settings tab of a flow

Problems Solved

By default, Experlogix Smart Flows compiles all of a flow's templates at flow execution. When the executed flow contains only one template, this process usually only takes a fraction of a second. However, this process takes longer and might even cause the flow execution to time out and fail in certain situations:

1. The executed flow contains one or more templates or compositions with a large number of template variants which are dynamically selected during flow executions
2. The executed flow includes one or more compositions with a large number of composing templates
3. The executed flow contains a large number of templates
4. The executed flow comprises one or more templates with complex mappings, conditions, and calculations

Data Set Analysis and Optimization

Experlogix Smart Flows can automatically reduce data sets at runtime to only collect the required fields to execute your flow. By default, we've enabled the field reducer setting to limit data retrieval from connected systems of record. However, when the field reducer is on, the system first analyses the flow. It compiles all of the flow's templates to determine the required fields. In scenarios with a large number of templates or a large number of pages in those templates, the compilation process itself may become lengthy. As an alternative to pre-compiling templates,

Experlogix Smart Flows 4.15 allows you to analyze and optimize your data sets automatically before runtime. When a data set is optimized, field reduction becomes redundant. In the Flow settings, you can control the field reducer behaviour via "Disable field reducer" checkbox.

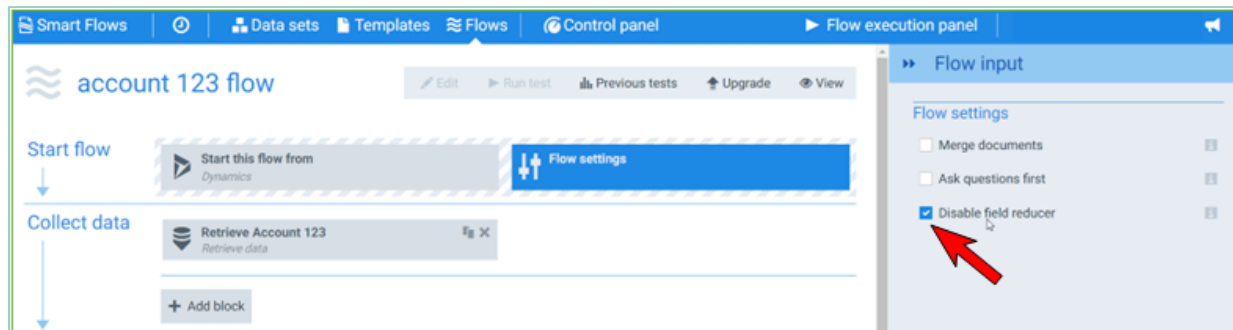


Figure 2 – Control the behavior of the automatic field reducer in the flow settings

A new [data set optimizer](#) option is available on the detail view of data sets. It provides a guided process to analyze and optimize the active data set. This ensures your data set only contains the required fields and relationships in-use by the flows and templates that use the data set. The process has three simple steps:

1. Analyze the dependencies of the data set
2. Identify fields and relationships to remove or add
3. Execute the optimization partially or in full

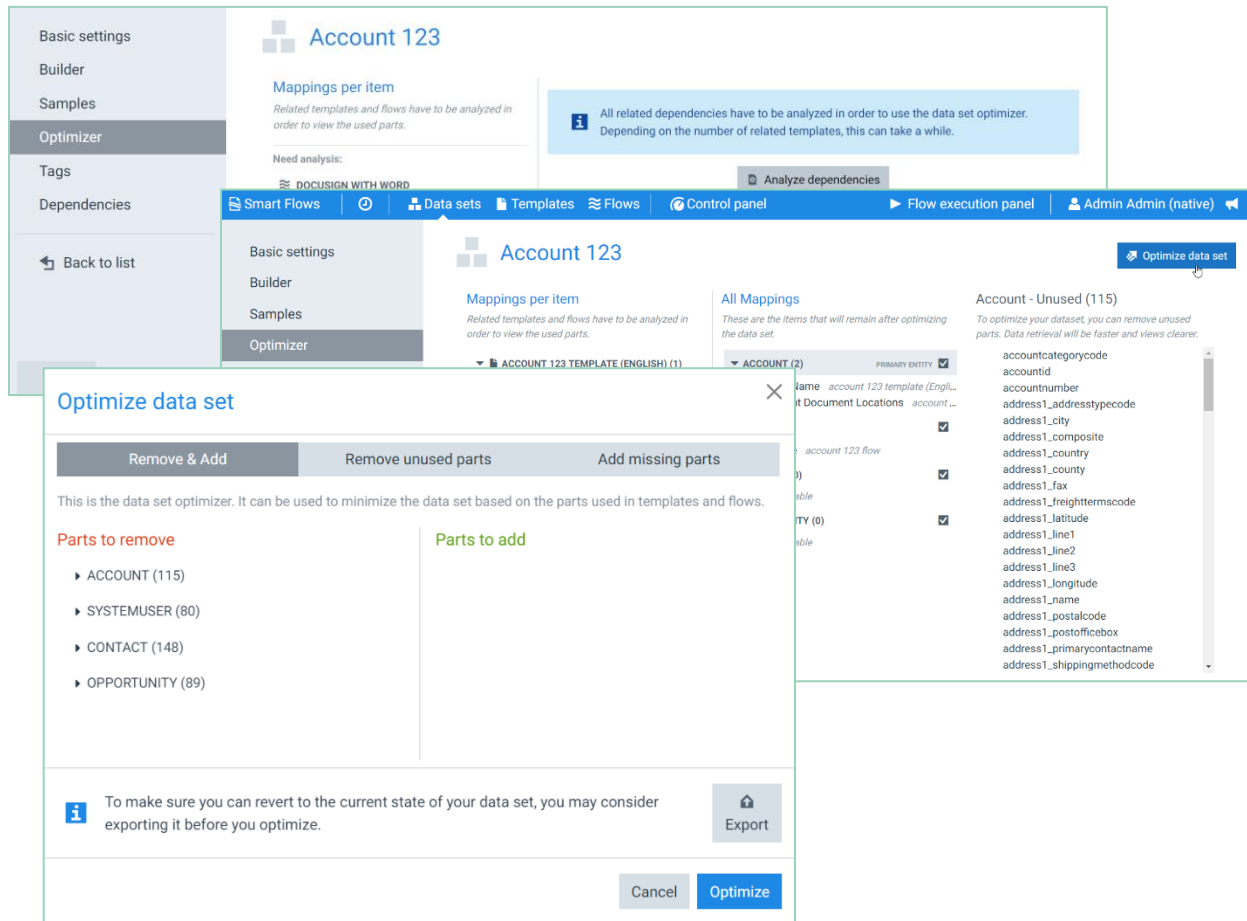


Figure 3 – [Guided experience in analyzing and optimizing data sets](#)

The primary benefit to optimizing your data sets is optimal flow execution performance when the field reducer option is switched off. However, a welcome side effect is that an optimized data set is much easier on the eye of a template designer. We recommend optimizing a data set in the following circumstances:

- when one or more of its dependent templates and flows transition from design to production
- when one or more of its dependent templates and flows transition to maintenance mode

Compilation Time Warnings

To warn you about compilation time issues, we've added a message that displays at flow output if the total time spent on template compilation during a flow execution exceeds 10 seconds. Whether you keep a pre-compiled version of certain templates available in the application cache, optimize your data sets, or both, these are all interventions for slow flow execution times caused by lengthy compilation time. You can modify the default 10-second threshold value via the application properties. [Our support team](#) can tweak the value for private cloud instances or refer you to documentation on how to set this parameter in an on-prem deployment.

To view warning messages, check the Messages checkbox in the Flow output parameters for every Generate document step in flows with the potential for lengthy template compilation.

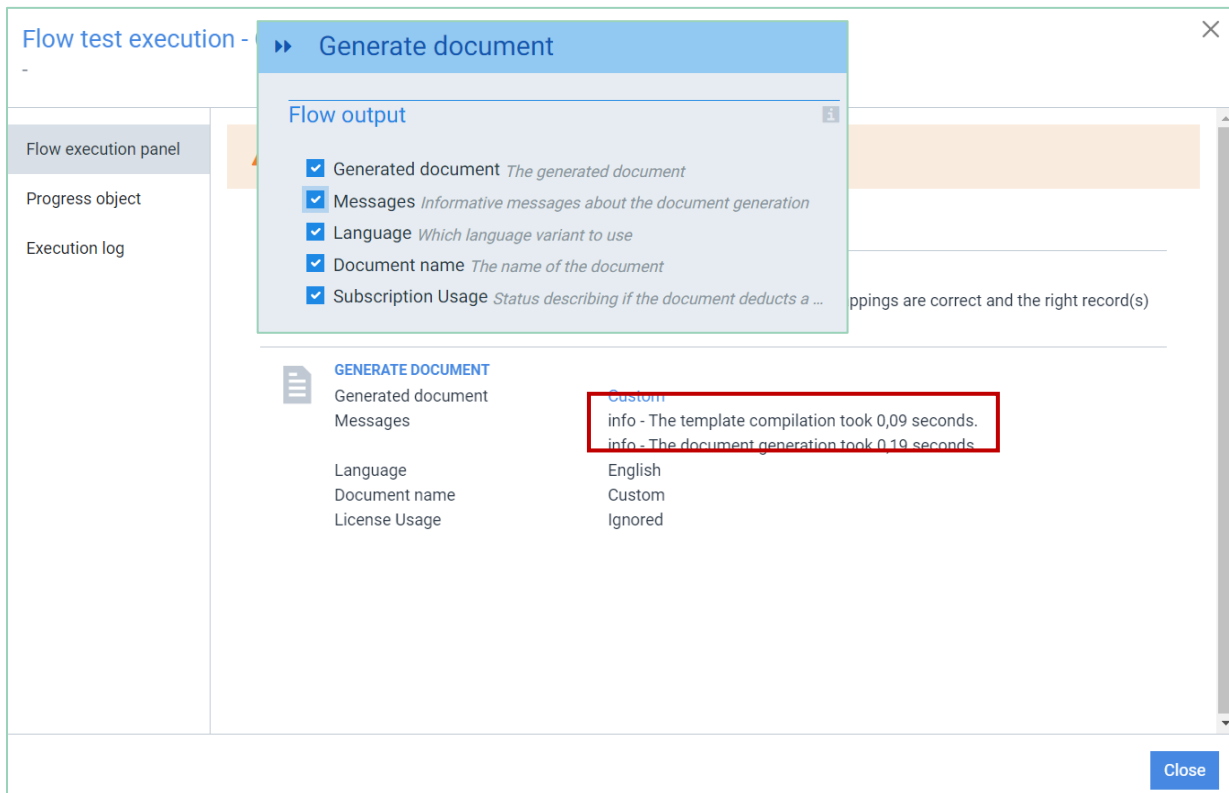


Figure 4 – Example of a template compilation warning with a warning threshold of 0 seconds

Template Builder in French

Template Builder is now also available with a French user interface. Template Builder 4.15 deploys automatically with Experlogix Smart Flows 4.15. It contains French translations for all ribbons, panels, and dialog screens in Template Builder. To switch to the French version of Template Builder, set French as the [primary language for Microsoft Word](#). Template Builder detects this setting and loads in French.

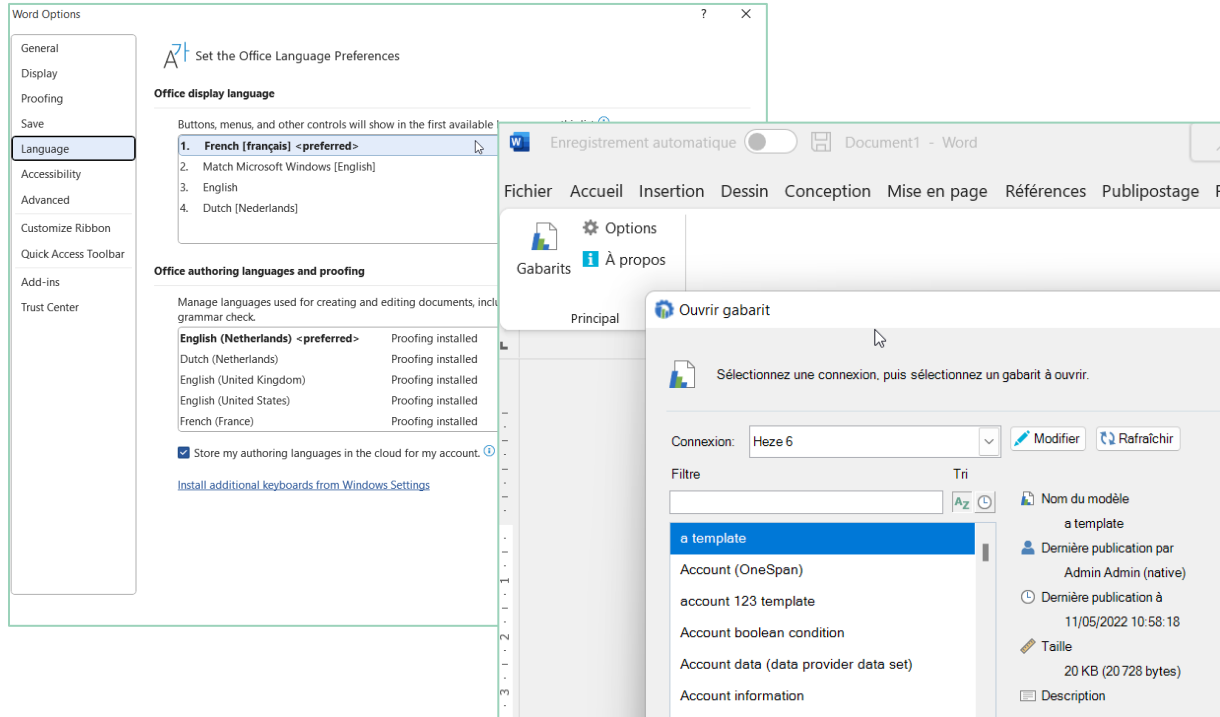


Figure 5 – Template Builder French user interface

Minor Improvements

This Experlogix Smart Flows release contains our customary minor improvements and fixes. We've listed them in detail on the [4.15.0 Release Notes](#) page. Areas improved include language support, integrations, security, and user experience. Among the more noteworthy minor improvements are these:

- **Template language support**
 - Experlogix Smart Flows 4.15 supports unlimited document languages
- **Microsoft Dynamics 365 for Finance and Operations**
 - The connector setup process now detects if the Experlogix Smart Flows vendor packages have already been installed in your F&O instance
 - Connector setup automatically grants the Smart Flows administrator security role to the user creating the connector
- **DocuSign**
 - The DocuSign connector collects output from the DocuSign data set used in the flow
- **Microsoft SharePoint**
 - An updated list of SharePoint metadata fields that match SharePoint's naming schema
- **Security**
 - Security updates for all relevant dependencies
 - Improved secure messaging for password reset requests and error handling in general
- **General**
 - The user experience has been optimized for better readability and easier field selection in search boxes.

About Experlogix

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