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Experlogix Smart Flows Release Preview Guide

Version 4.19

18/10/2023



Highlights

Experlogix is excited to announce the release of Experlogix Smart Flows 4.19 in fall 2023. Experlogix Smart Flows continues to simplify the most complex document automation challenges by empowering business users to generate and deliver better documents faster.

Experlogix Smart Flows 4.19 introduces the **capability for authenticated users to write documents in Microsoft SharePoint and send envelopes with DocuSign while maintaining their authenticated user's identity**. In the previous version of Smart Flows, such individual user authentications were available for Salesforce.com connectors only. In Smart Flows 4.19, we have extended the scope of this feature to Microsoft SharePoint and DocuSign connectors. With this release, Experlogix Smart Flows users logged in individually into their company's DocuSign account can now be the owner of the DocuSign e-signature process, which no longer requires a generic account. Users authenticate to a Microsoft SharePoint connector with their individual SharePoint credentials can now be the owner (created by) of any SharePoint documents produced during the flows they run. While these new capabilities let you interact more personally with your customers and other stakeholders, they also contribute to the auditability of your document flows.

In Smart Flows 4.19, we are introducing a handy feature that allows admin users to download a **diagnostics report** with recent flow executions. Additionally, in response to customer feedback, we have implemented the ability to export all the data displayed on the reporting dashboard and allow different filtering options for lean and tailored data analysis.

We have **simplified the process to increase the document volume and the user count allowances on your Smart Flows subscription**. Admin users can now launch a request to increase the document and user count on their subscription directly from the application. Our Experlogix provisioning team will gladly address and fulfill these requests, ensuring a smooth and successful license upgrade.

Important Deprecation Notifications

Although the integration with **version 9.0 of Microsoft Dynamics 365 for Customer Engagement** has been deprecated, Smart Flows 4.19 is guaranteed to work with Microsoft Dynamics 365 Customer Engagement 9.0, with the feature set of Smart Flows 4.17. We no longer ship a **workflow solution** for Microsoft Dynamics 365 CE, but the 4.18 version of the workflow solution is guaranteed to work with the 4.19 version of the Smart Flows core engine in all supported versions of Microsoft Dynamics 365 CE. We advise transitioning to Microsoft Power Automate for process automation and considering upgrading to a higher version of Microsoft Dynamics 365 Customer Engagement, such as 9.1 or 9.2, all of which are fully supported.

Experlogix Smart Flows 4.19 also marks the deprecation of the **connector for Google Cloud Print**. Google deprecated its printing service in January 2021 and discontinued it. We will remove the connector code when 4.20 is released. We recommend looking into our plug-and-play connector for [PrintNode](#) as an alternative.





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Individual User Authentication for SharePoint and DocuSign

Experlogix Smart Flows is expanding its capabilities for individual user authentication across multiple connectors. In the 4.19 release, all inbound and outbound data processing steps related to Microsoft SharePoint and DocuSign connectors will be able to leverage the identity of the active, authenticated user who runs a flow. Considering auditability, this approach may be more favorable than the traditional practice of carrying out these flow steps with a service user or a connector user. But above all, this allows for a more personal touch to your interactions with customers and other stakeholders.

End User Perspective

When individual user authentication is enabled for either Microsoft SharePoint or DocuSign, the first time users run a flow, they will be prompted to log in with their own SharePoint/DocuSign credentials. They will be prompted to do so the first time a flow they started progresses to one of the following steps:

- Send to DocuSign
- Store in Microsoft SharePoint





Once the user successfully authenticates, the flow execution can proceed. If, for any reason, the user cannot authenticate, the flow will be temporarily paused and can be resumed at a later time. Resuming the flow execution can be done either from the Flow Execution Panel or the Notification Panel.

Microsoft SharePoint and DocuSign utilize access and refresh tokens but differ in their approach to refresh tokens. In SharePoint, when a user exchanges a refresh token for a new access token, the system continues to use the same refresh token. On the other hand, DocuSign provides a new refresh token with each token exchange, ensuring its renewal through regular interactions with the system. For both connectors, once this token expires, the user will have to go through the reauthentication process again.

Users can manage their own Individual **User Authentications**, accessible via the **Flow Execution Panel – User Settings - My connected apps**. Here, they will find a list of connectors supporting Individual User Authentications and information regarding the user's current authentication status. Users can either log into a connected app or revoke the existing authentication token as needed.

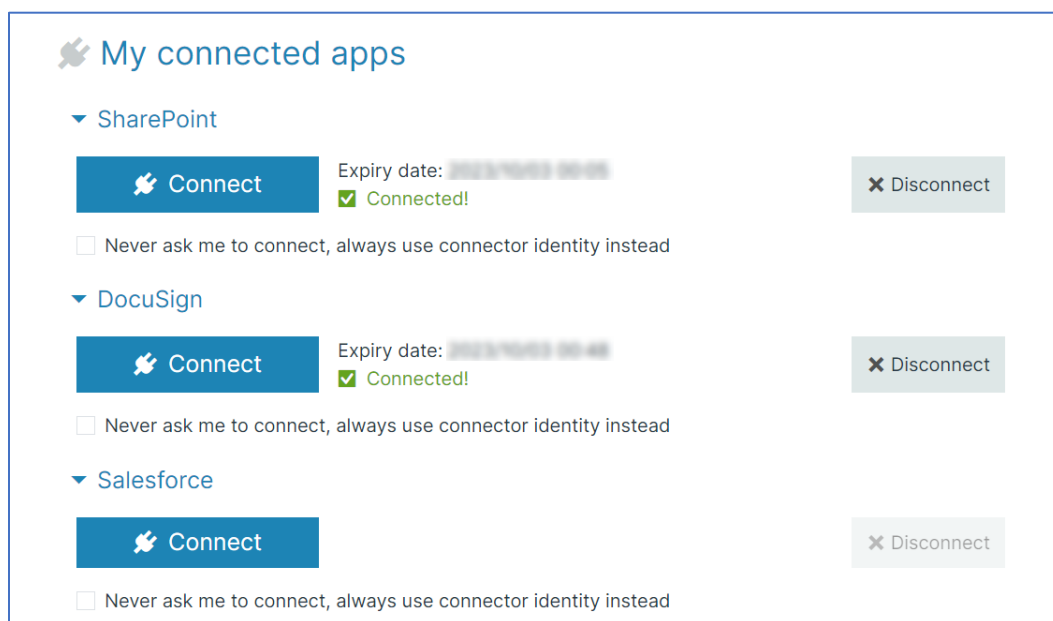


Figure 1 – My connected apps section in the Flow Execution Panel





Export Diagnostics Reports from the Reporting Dashboard

In the Reporting dashboard in the 4.19 release, admin users will find the option to export all listed flow executions. This means users can obtain a complete record of all flow executions or have a customized export by applying different filters from the Export Flow Executions dialog. Users have the flexibility to specify data gathering parameters, such as:

- set a date range for the report
- filter by statuses, users, flow, classification (production or test)

The enhanced export functionality allows users to save the export as a comma-separated values (csv) file, ready for import in a spreadsheet or other application.

Export Flow Executions

All Apply filter

Export file name

Flow Executions Oct 2023

☒ Include flow execution state

▼ Status

✓ ⚠ ✖ ⏸ ▶ ⏪ ⏩ ⏹

Flows

Account

Started by

Blurred Name

Started at

From 2023-09-20 📅

Purpose

All Production Test

Close Export

Figure 2 – Export flow executions dialog within the Report page





Post-execution Data and Document Cleanup

We are introducing a new configuration setting in Flow Builder to automatically remove all data that a flow retrieves and any documents it generates immediately after a successful run. While the execution report will be retained, the associated data and documents will no longer be accessible for download from Smart Flows. The primary objective behind this enhancement is to guarantee that no potentially sensitive data or documents are retained in Smart Flows.

The new **execution cleanup** setting is unchecked by default so that the flow will preserve the data and documents after successful execution until the next automated cleanup. Administrators can manage the cleanup configuration via the settings section of the Control Panel.

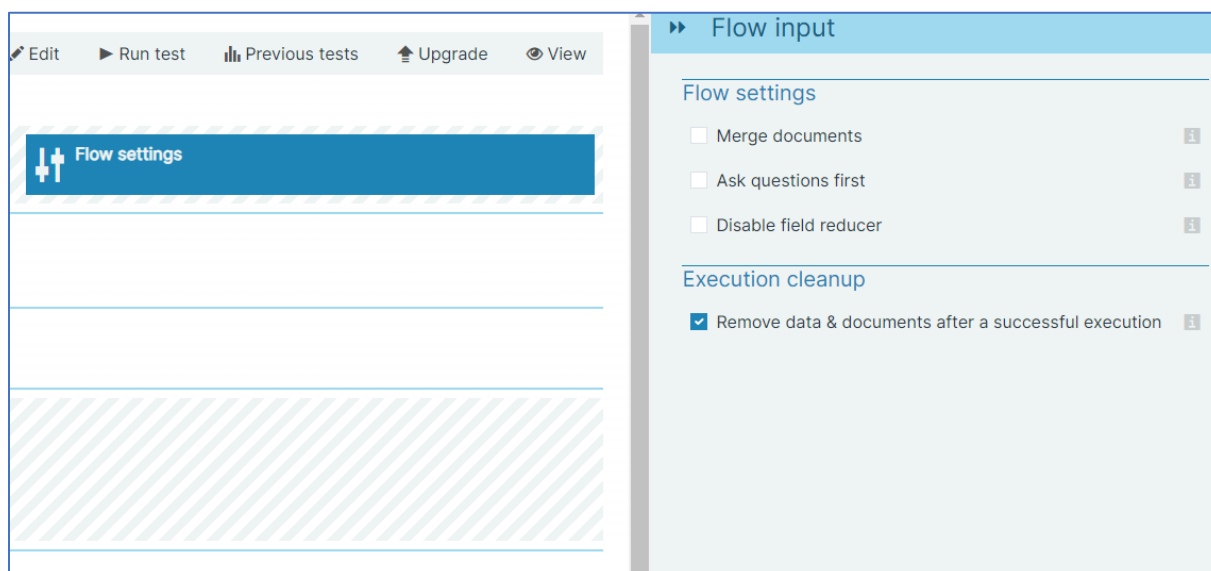


Figure 3 – Remove data and documents after a successful execution is enabled in Flow settings

Retrieve File from a FilePicker Field in a Smart Form

When using a **FilePicker** field in an **Xpertdoc Portal Smart Form**, the 4.19 release of Smart Flows allows you to map the uploaded file in a subsequent flow step. The FilePicker field is marked with a document icon in the data set, so it is easy to identify it as a document field. Any flow block that expects a document as an input can use this field. Examples of such flow blocks include the following:

- store in Microsoft SharePoint





- send to e-signature provider
- save in CRM/ERP system
- send e-mail (body or attachment)
- convert document

There is a limitation to mapping documents from Smart Form FilePicker fields; **only one document** can be retrieved per field, even if multiple files were selected in the FilePicker. So keep this limitation in mind when designing your forms.

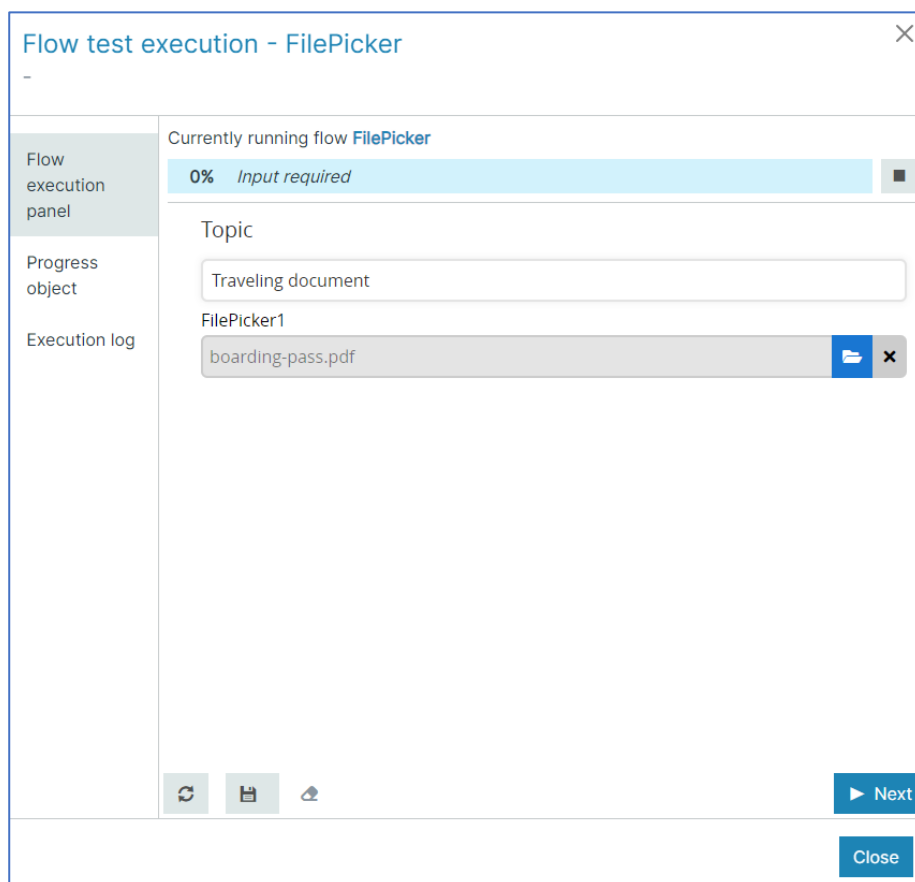


Figure 4 – Adding a document with a FilePicker field in a Smart Form





To convert the output of a FilePicker field to a document that can serve as an input of another flow block, you can insert a **“Fetch Document”** step in your flow. This step will turn the content of the FilePicker field (a base64 string) into a document. Subsequent flow blocks can then use this document for further processing.

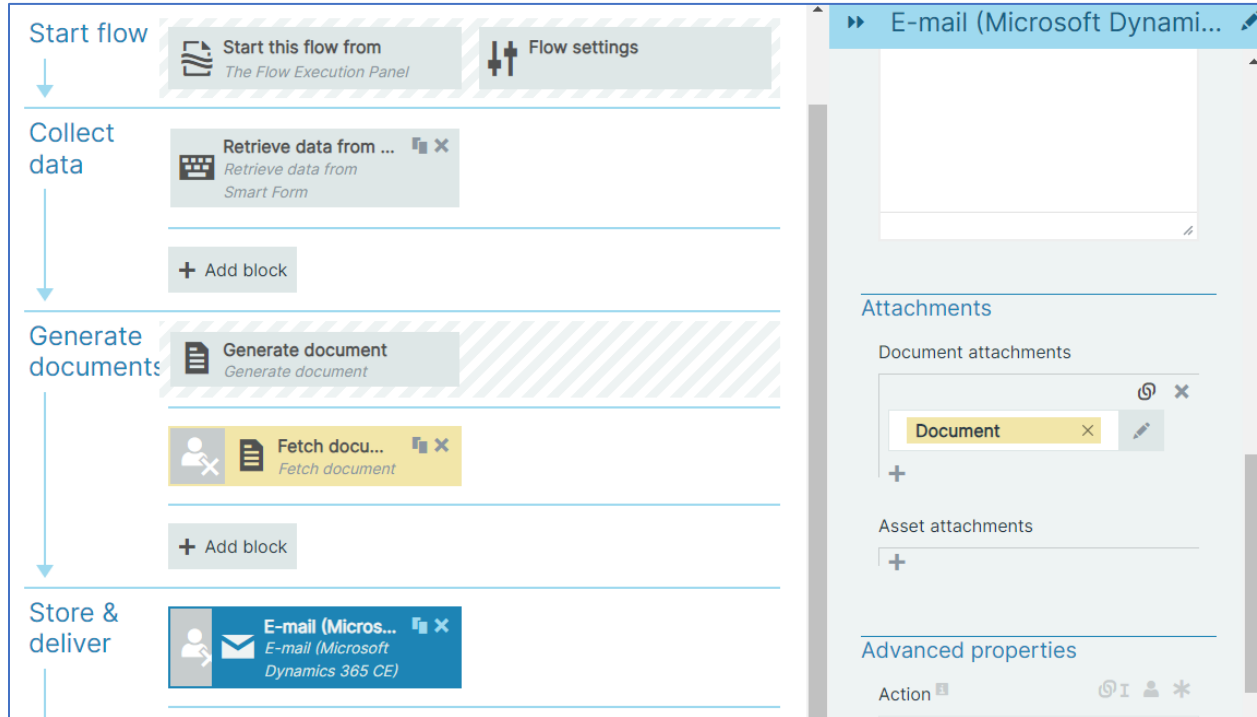


Figure 5 – A flow that fetches a document from a Smart Form FilePicker field and attaches it to an e-mail



Upgrade License to Add Documents and/or Users

In version 4.19 Experlogix Smart Flows, Administrators can file a request to upgrade the project license with additional users or documents. This new capability is accessible via the **Licensing** section of the Project Console.

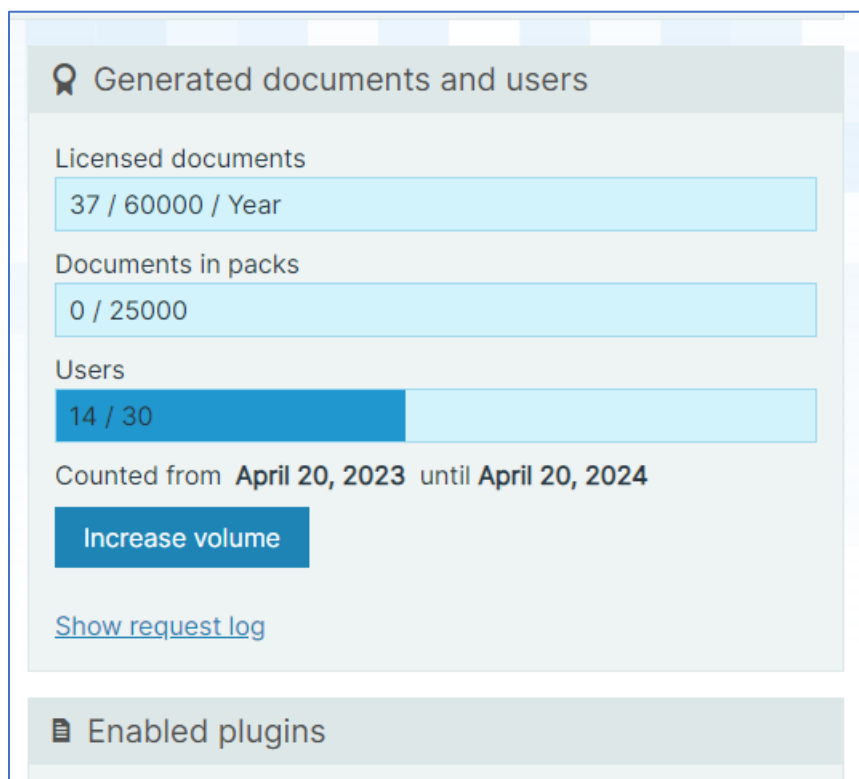


Figure 6 – License upgrade overview on the project License page



A license upgrade request can consist of a user or document volume increase or the addition of a document pack. You can adjust the sliders to increase the volumes of your license, with a minimal increment interval of 5,000 for documents. Upgrade requests are confined to the limits of your current subscription plan. If you need an upgrade beyond those limits, Experlogix and the community of Smart Flows implementation partners are happy to help you.

Figure 7 – License upgrade request dialog

Once a request for expanding user or document counts (or both) is submitted, the Experlogix provisioning team validates and processes the request. Please consider that validation requires human intervention at this stage, which may take up to a few days. After that, the system automatically adjusts your project license to the new volumes.

As a Smart Flows Administrator, you can track the status of your license upgrade request. A request can have the following states:





Request State	Description
Open	The request has been sent.
Pending	The provisioning team is reviewing the request.
Approved	The request has been approved and implemented by the provisioning team.
Rejected	The provisioning team has rejected the request.
Cancelled	A Smart Flows Administrator canceled the request in the Project Console.

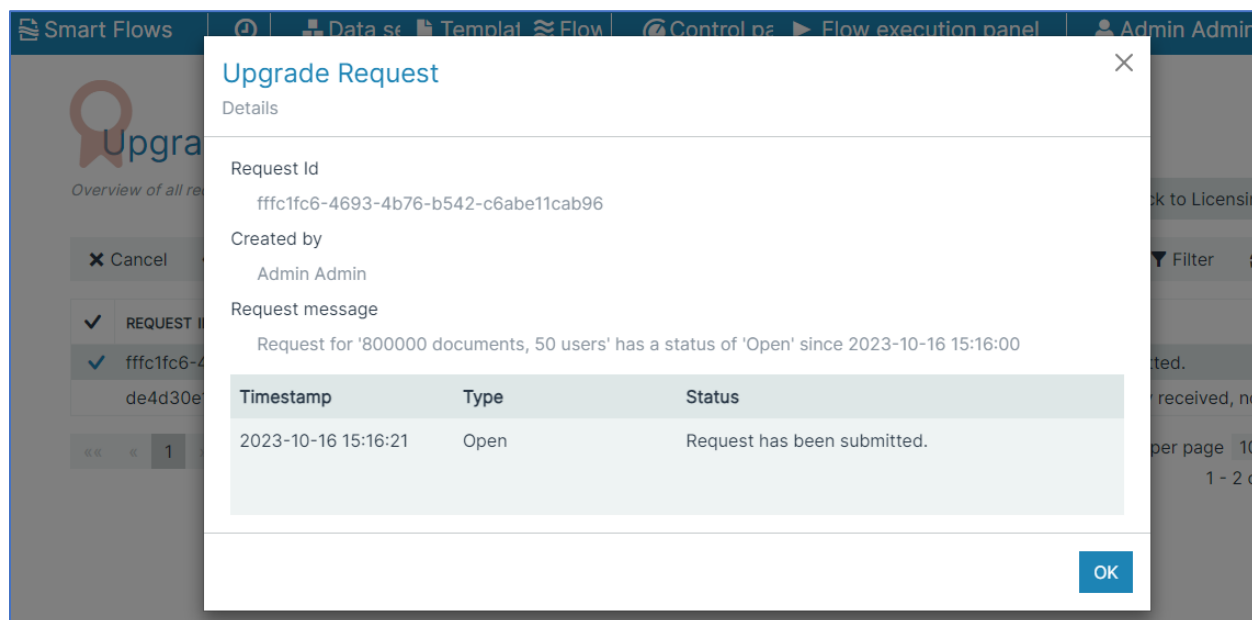


Figure 8 – Request details overview

Access to the section for increasing the user and document counts within a project is limited to Administrators. Please note that only one upgrade request per project can be active at a time and that upgrading your license will likely result in changes in your monthly or yearly license fee.





Minor Improvements

- **Flow Execution Panel**
 - After a successful flow execution, users are informed about the retention period for the execution data, document(s), and the execution report.
- **Flow Builder**
 - Enabled flow configurations, such as *"Ask questions first," "Merge documents,"* and *"Disable field reducer,"* are shown in a blue flow configuration zone. Hence, the designer sees at a glance that these configurations are on.
 - Users will receive a notification when testing a flow with the testing watermark disabled. This ensures the flow designer knows that testing without watermarks consumes license volume.
- **Template Builder**
 - The maximum number of samples a template can contain has been raised to 50 instead of 20. Samples are listed in alphabetical order.
- **Connectors**
 - *Microsoft SharePoint connector* - In response to a Microsoft security enhancement in Microsoft 365 tenant governance, known as MC660075, the default permissions now restrict the creation or modification of ACS service principals to tenant administrators exclusively. We have adjusted our Microsoft SharePoint connector to provide the necessary guidance to our users to know how to troubleshoot this security impediment and proceed with the completion of the connector setup.
- **Project Console**
 - We have added a checkbox in the User Interface Settings of the Project Console to show or not show success messages when users create, update or delete items. By default this checkbox is unticked, so no success messages will be displayed.

Release Notes and Release Artefacts

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

- [Experlogix Smart Flows 4.19 Release Notes](#)
- [Experlogix Smart Flows 4.19 Release Artefacts](#)





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 — 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.

