Introduction

We're enhancing our Smart Communications solutions and providing this guide to ensure your organization is prepared for the update.

The Knowledge Hub will be updated prior to Customer Preview to show the new features for this release and should be consulted for the most up to date information.

Key Dates:

Customer Preview:

Wednesday, 27 May 2020

General Availability:

Sunday, 26 July 2020

Intelledox Infiniti is now SmartIQ

SMART IQ™

New Name – Same Great Product

SmartIQ offers the same forms transformation and intelligent questioning ("IQ") capabilities that you have come to depend on, but with a new name and design that aligns with the Smart Communications portfolio of offerings including our next gen CCM solution, SmartCOMM, and our Capital Markets solution, SmartDX.

Design

Produce

Manage

Smarter Solutions

SMARTCOMM™

Next-Gen CCM.

SmartCOMM delivers personalized, interactive communications via multiple channels and at tremendous scale. Designed for the business user, it simplifies and standardizes processes, thus improving internal efficiency and increasing ROI.

SMARTDX™

Trade Simplified.

All of the G15 investment banks and some of the world's largest energy and commodity companies trust SmartDX to help them simplify trade and relationship documentation for all market participants, across all asset classes and product types.

SMARTIQ™

Forms Transformation.

SmartIQ transforms traditional forms-based processes into intelligent, conversational user experiences. It increases customer engagement while streamlining internal systems, managing risk and reducing demand for support services-- delivers more customers ready to transact.

Innovation Themes

Customer Experience

Channels

User Experience

Content Assembly

Negotiation

Deployment Flexibility

Intelligence & Information

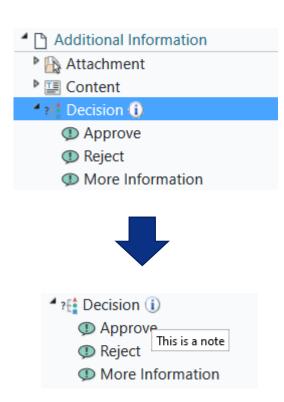**Enterprise Integration**

Partner Strategy

Customer Experience

Design Notes

Available on all questions and layout elements, the Notes property is for a Designer to document and comment explanations about logic and questions for future reference.
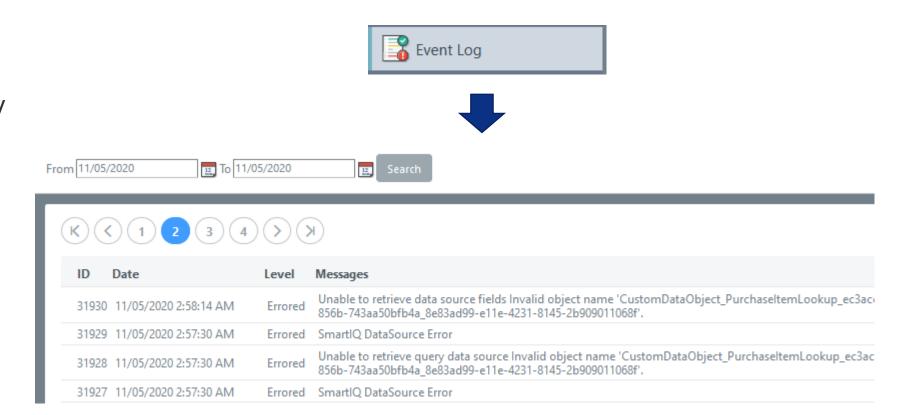
New icon shows against the element in the tree view when a note is present.

Note is also revealed to the user by hovering on the icon.

Event Log in Manage

Administrators can view logging which was previously only accessible via the database.

Question References in Tab Names

Question references have been extended to Tab Names.

This support also extends to the accordion display type

Restrict Project Channel

An individual project can now be restricted to a particular channel. Either Web, Offline Apps or both.

This additional option is available on the Publish Project page in Manage.
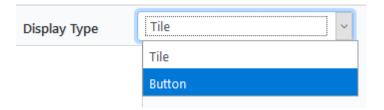
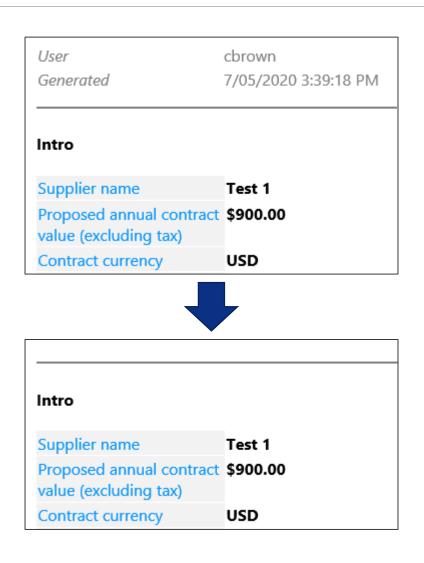# Button Question Improvements

Existing Tile Display Type
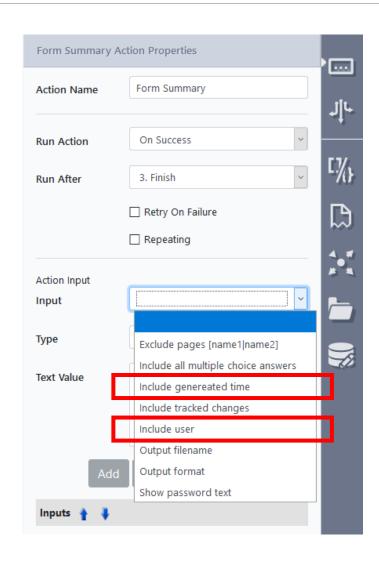
New Button Display Type

Omit Generation Details from Form Summary Action

Current release:

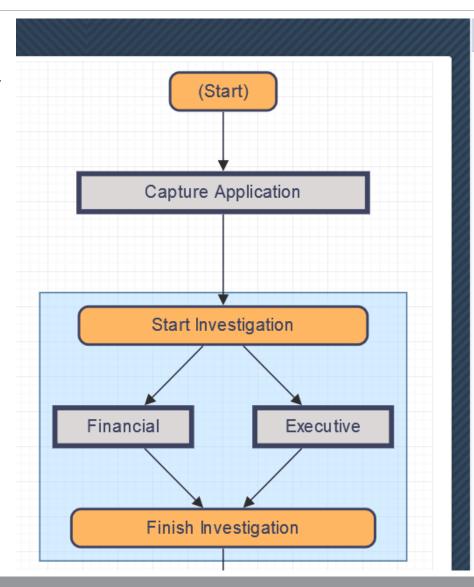Include generated time = true
Include user = true

Sample configuration:

Include generated time = false
Include user = false

Block Concurrent Editable States

Parallel sections allow a lot of flexibility for the Designer to determine who can see and manipulate pages and questions during a workflow.

Instead of configuring all of those rules the system can simply block users from editing in a state if it's open by another user. Avoids additional configuration and possible data clash.
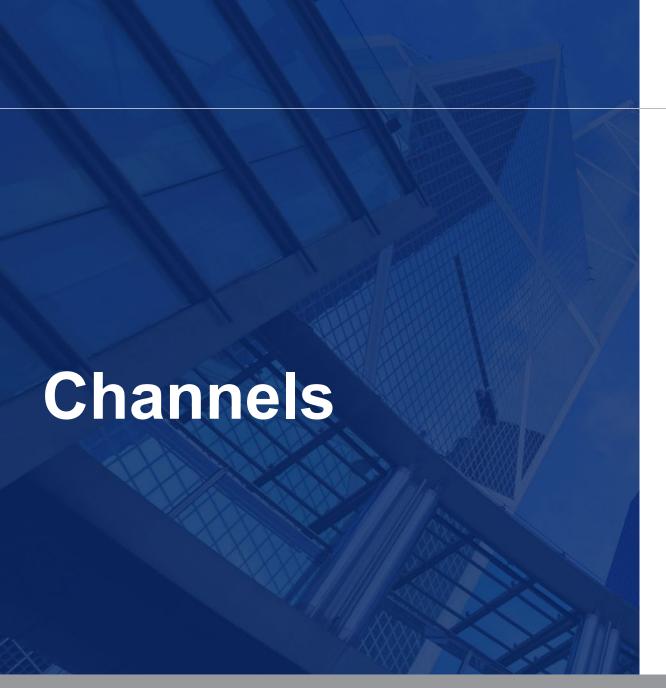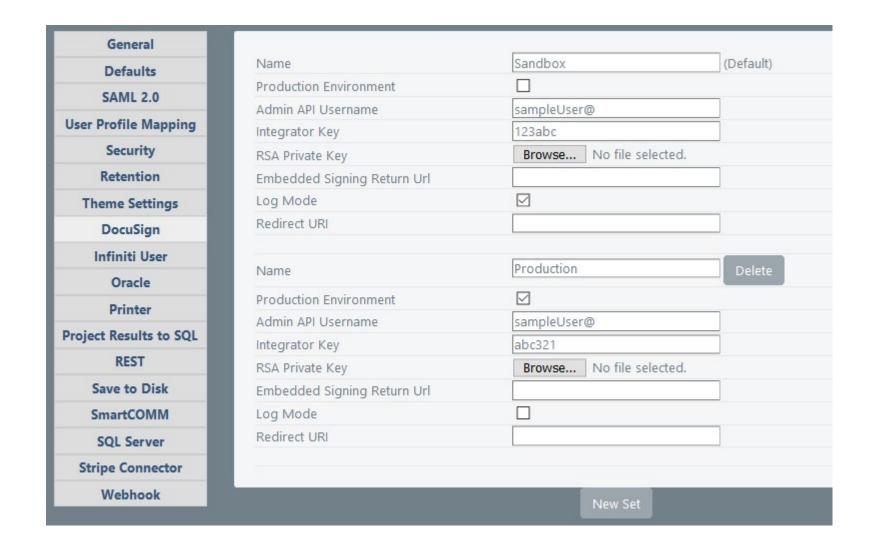
Channels

DocuSign Named Sets

Connection Setting "Sets" functionality has been extended to include DocuSign.

This allows a single instance to connection with multiple DocuSign credentials or environments allowing the designer to select what get's executed at runtime.
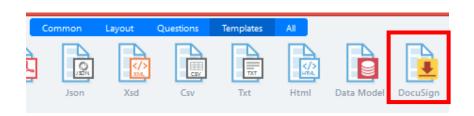
DocuSign Template Support in Design

Simple way to leverage investments already made in DocuSign Templates.

New Template type allows selection of a DS Template and loads the Data Label field from DocuSign as well as the required Recipient actors defined in the template.
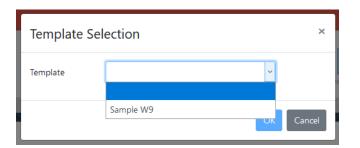
Each is created as a placeholder for mapping by the Designer.

In it's simplest form there is no need to even use the DocuSign Action to create an envelope. The defaults are picked up from the Template at runtime.
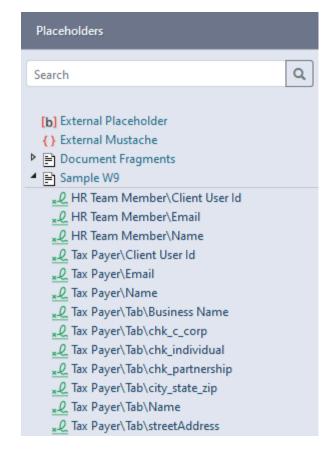
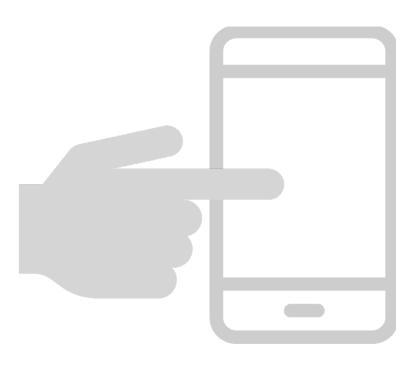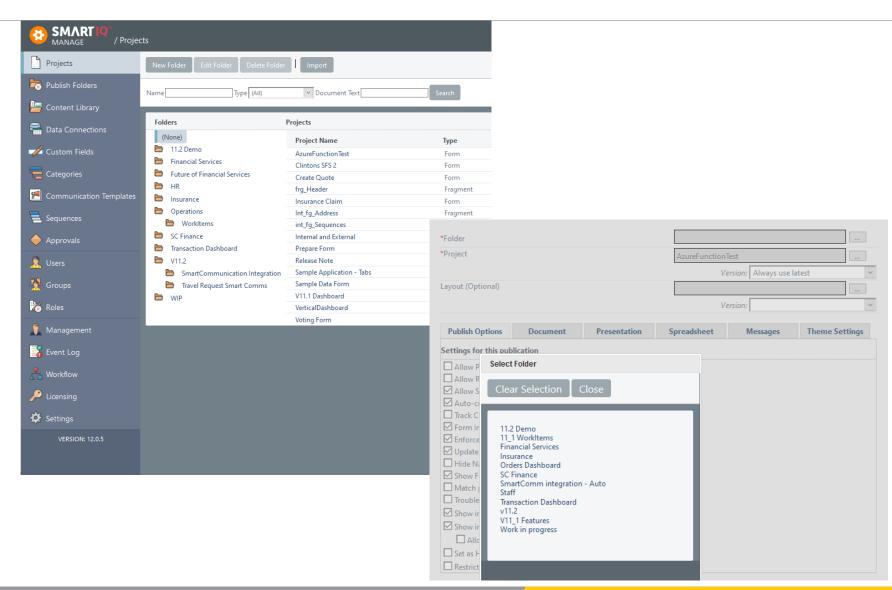The same mapping can also be passed into the DocuSign Actions for advanced use cases.

User Experience

New Look for Manage

Shifted to the same front end framework used for Produce (Bootstrap 4)

Colors and layout reflect rebranded product alone with Smart Communications OneUI strategy.

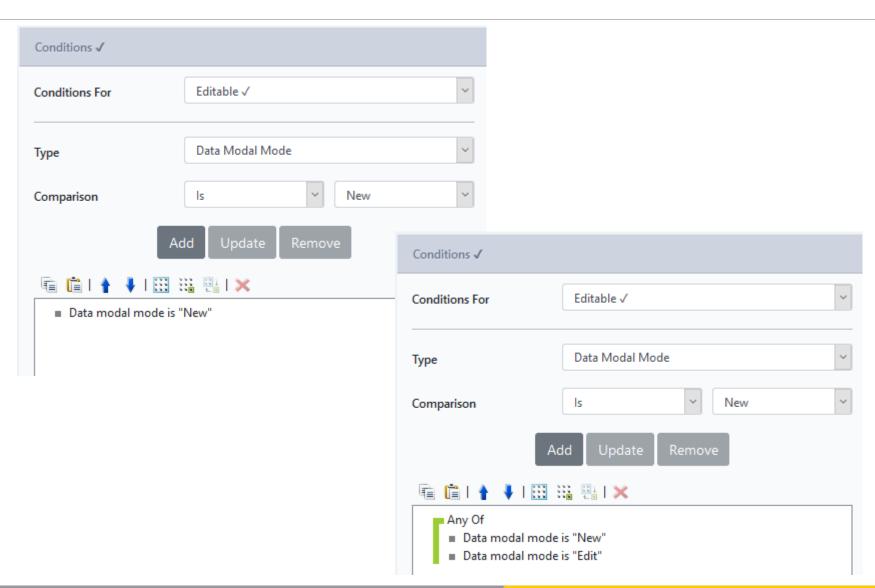Includes Modals where previously popup windows were used.

Data Modal State Awareness

Data modal projects for Custom Data Objects now have a condition type "Data Modal Mode" which allows a Designer to change the layout and questions shown based on whether the modal is being loaded in Edit or New mode.

E.G The New mode may have different labels to guide the user creating a record. The Edit mode may mark mandatory questions as not-editable while leaving optional questions editable.
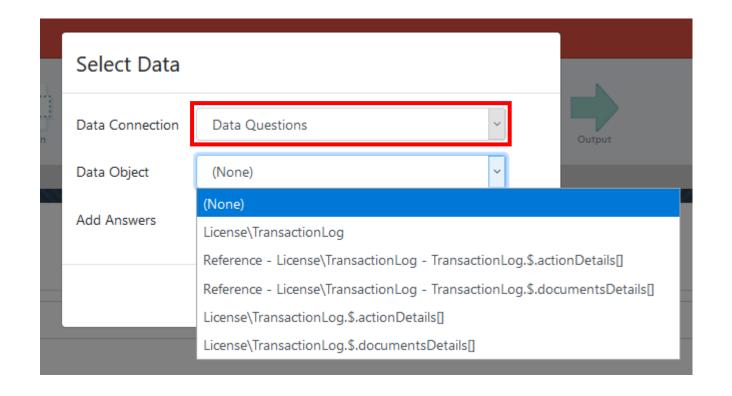
Data Question Improvements

Simplification and optimization of Data Questions when consuming hierarchical data.

These improvements also allow direct filtering of collections and sub-collections without re-querying the data connection.

E.G. The Data Questions is a new item to selection from the Connection list when adding a Data Question. Data objects then shows the existing questions and sub-collections available.
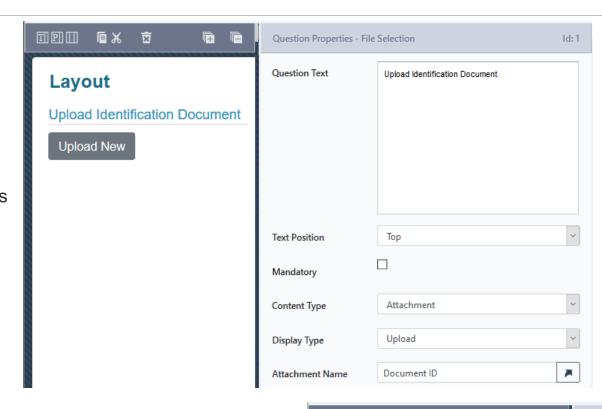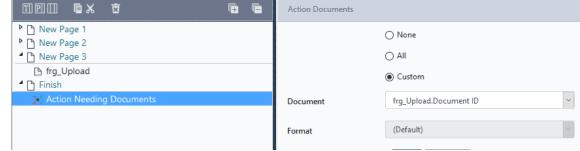
Fragments and Uploads

To date it has only been possible to add uploads from the base project to a Custom Action Documents. Uploads sourced from a fragment were not available, although Generated documents were.

Documents uploaded from the first level of fragments are added to the Document collection for use in Actions by the base project.
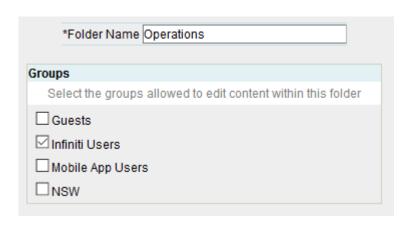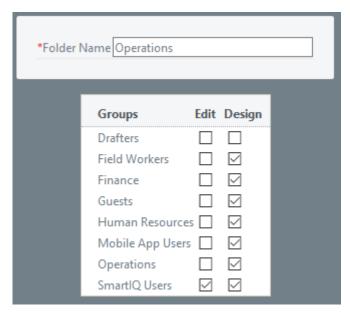
Separate Business Unit Content and Data

Folders within Manage previously specified group who could edit content.

This functionality has been extended to determine who can consume those assets from within Design.

If a Designer is not a member of a group with Design permission on a folder, the assets such as Data Connections, Content Library items and Fragments will not show up for consumption in Design.

Up to 11.2

New permissions
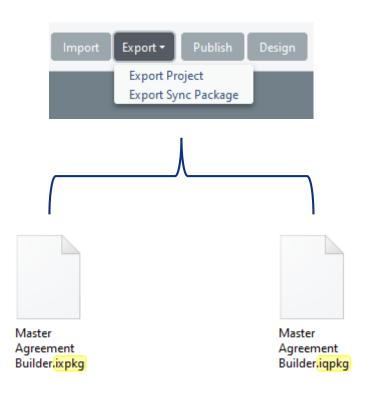
Import/Export Sync Package

SmartIQ now has two export formats:

Export Project to .ixpkg – Existing export breadth with Projects, Fragments, Data Connections and Content Library Items

Export Sync Package to .iqpkg - Prepares a broader export than the ixpkg which includes all the contents of the ixpkg with the addition of:

a.   Folders (and their permissions)

b.   Groups (and their permissions)

c.   Custom Fields

d.   Communication Templates

e.   Sequences

New per tenant options

Previous to this release the following options were enabled via a settings file on the server and were inherited to all tenants. Some remain under managed control by operations (as a database switch) while others have been shifted into the Manage interface for an individual tenant to control.

Show Full Troubleshooting Errors – Disabled by default, available in Manage

Allow Timeout – Disabled by default, set by operations. This relates to whether user sessions are set to timeout. The timeout length is set for the instance by operations.
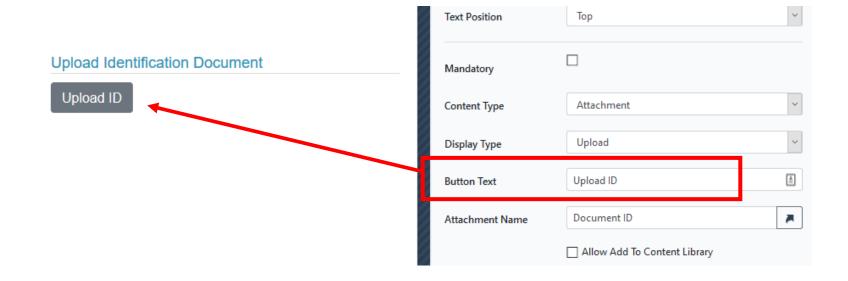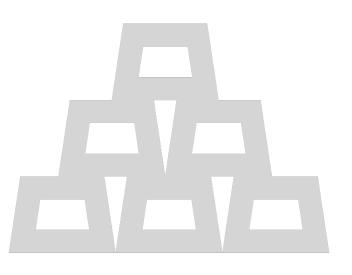
File Selection Button Text

The File Upload question now has Design properties to override the default "Upload", "Take Photo", or "Record Audio" buttons (as applicable to the content type).

If the specific button (Take Photo or Record Audio) isn't displayed due to platform restrictions, the default Upload button will fall back to using the customised Upload button text (as shown).

Content Assembly

SmartCOMM Draft Editor Integration

SmartCOMM Draft Editor is a powerful intuitive editor for users to personalize communications in real time embedded seamlessly within SmartIQ, empowering users to easily add free text and pre-approved content via simple choice lists or from a library of shared content.

Functionality is assigned to a user as a workflow state to give them a dedicated task and UI to work within while drafting changes.
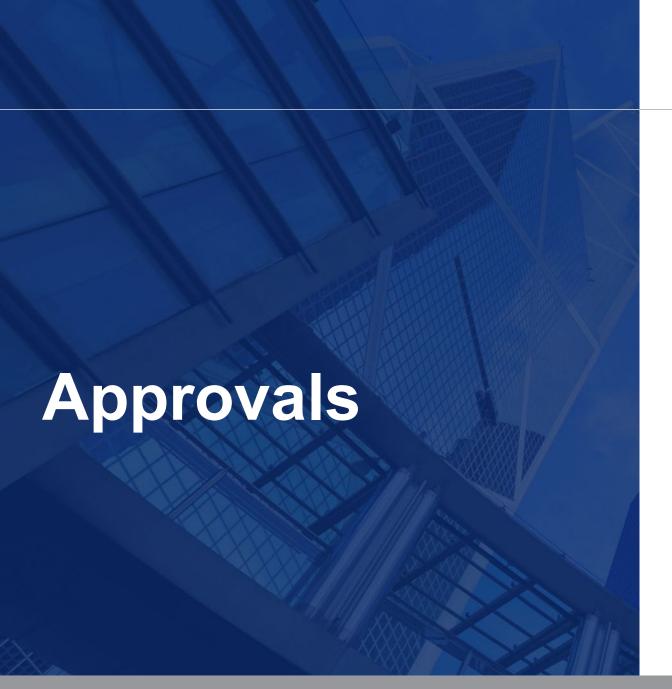
Final document is generated by SmartCOMM for Preview in subsequent states and is available for Actions.
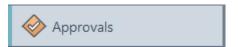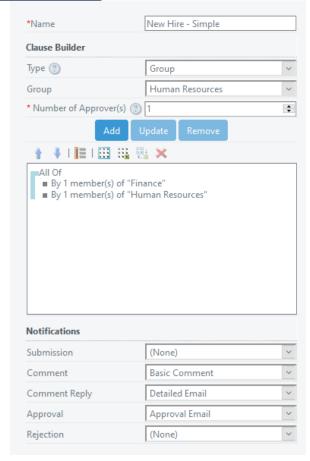
SSO via SAML Integration

Approvals

Enhanced Workflow State and Reusable Approvals

Approval thresholds with parallel group assignment shown here.

Defined in Manage, assigned by workflow transitions allowing dynamic workflow selection.

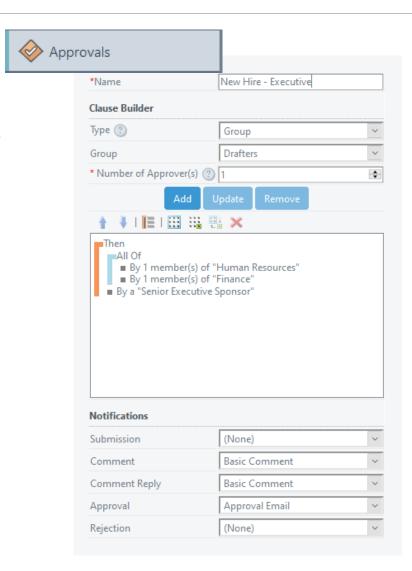Clause Builder similar to Conditions in Design

In this case the approval is satisfied with 1 member of the Finance group approving and 1 member of the Human Resources group approving. All approvers can review and comment with the requestor simultaneously.

Communication templates are specified for the different notifications that could be received.

Enhanced Workflow State and Reusable Approvals

Approval thresholds and parallel group assignment and be coupled with further subsequent approvals in this definition or as subsequent workflow steps.

In this case the approval is satisfied with 1 member of the Finance group approving and 1 member of the Human Resources group approving. After that clause is satisfied the User assigned to "Senior Executive Sponsor" at runtime by the Designer will also need to Approve the request.
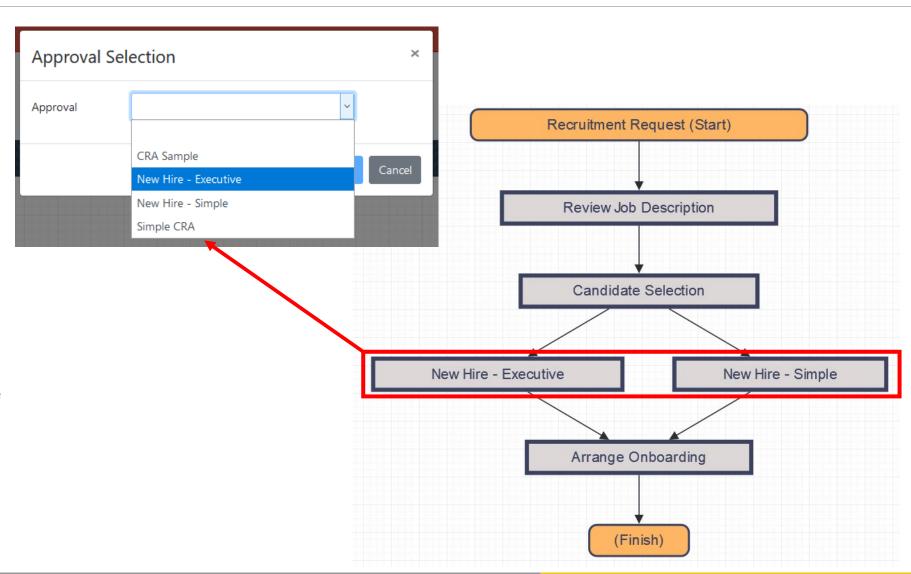
Approvals Applied to Workflow

Delivered as a new type of workflow state, approvals are added from the library of created approvals.

Transition conditions determine which path and as such which approvals are required.

Design time inputs such as the "Senior Executive Sponsor" are mapped to the approval from the form question set.

Each approval then determines how the form behaves for an approver.

Approval in Read Only View
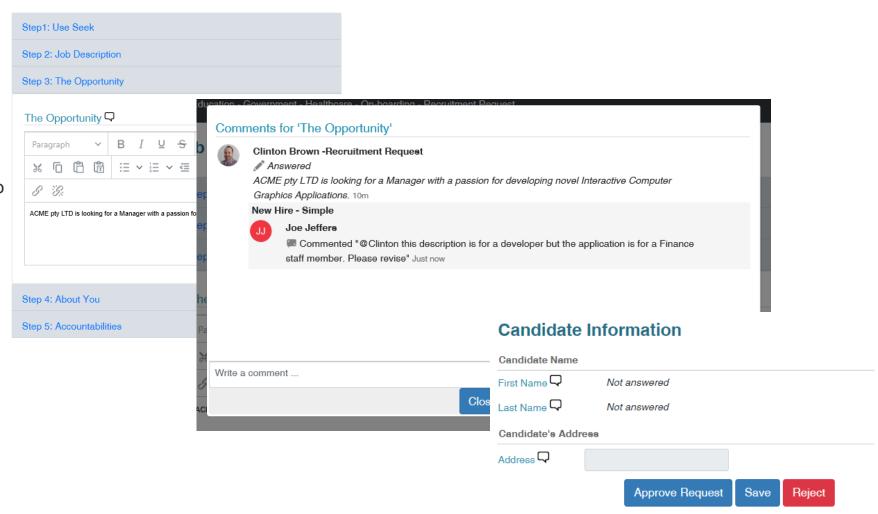

SMART COMMUNICATIONS™

The requester can enter the form and modify answers, reply to comments in a bid to satisfy the feedback from Approvers.

They work as a team to get the request to an agreed way forward.

Approval Management
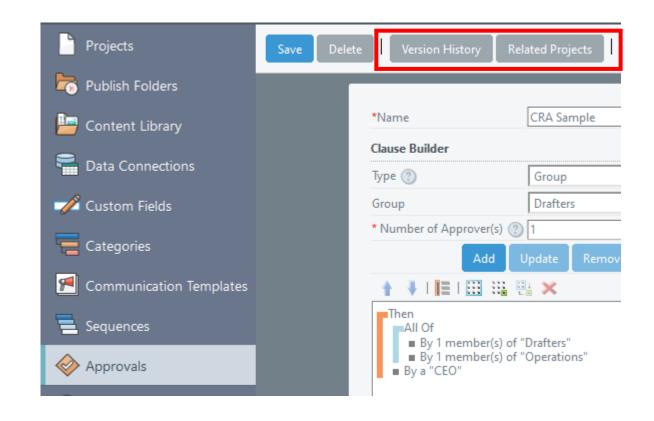
From within Manage there are several new ways to consume the approvals information.

SmartIQ Data Connections:

- User Assigned Approvals

- User Group Approvals

- User Assigned and Group Approvals

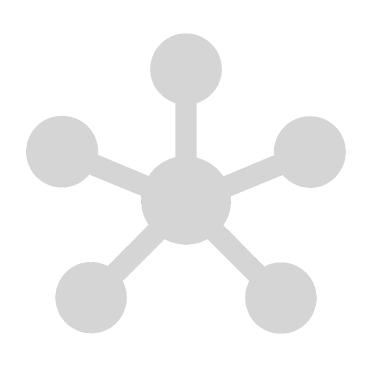Approvals usage:

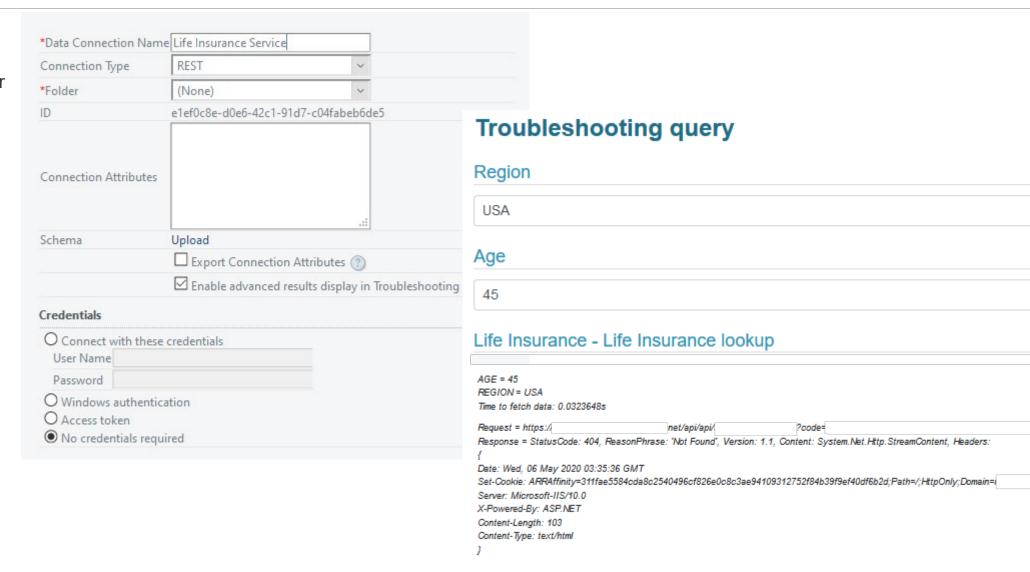- Version history

- Related Projects

Enterprise Integration

Request Response for Data Connection

Detailed traffic capture for diagnosis and troubleshooting REST service integrations
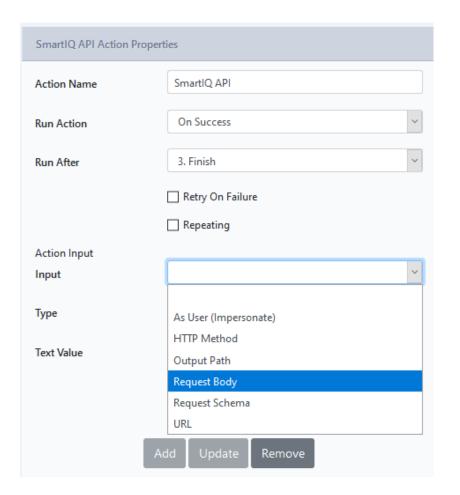
Request Body and Schema for API Action

Extended from the functionality in the REST Action, a direct REST body and associated schema can be used with the SmartIQ API Action.

The primary use case is defaulting many if not all of the body for a call and bypassing the required schema generation steps.

Notices

Supported Platforms

Browser

This release supports the following browser versions:

- Microsoft Internet Explorer 11 (latest build)

- Microsoft Edge (latest build)

- Google Chrome (latest version)

- Mozilla Firefox (latest version)

- Apple Safari (latest version)