experlogix
Document Automation

Release Preview

Winter 2025

Experlogix Smart Flows 4.26

Experlogix Documents 1.0.0-preview

Foreword

Welcome to the Experlogix Documents Winter 2025 Release Preview Guide. In this release, we are excited to introduce significant advancements that reflect our ongoing commitment to empowering organizations with greater control, transparency, and inclusion in their document processes. Building on our foundation, we've focused on enhancing accessibility features—ensuring that your documents are not only compliant with evolving global standards but also truly usable by everyone.

Alongside improved accessibility validation, we've introduced new capabilities for control and auditability throughout your document workflows. These improvements help you maintain oversight, track compliance, and streamline processes, making it easier than ever to deliver secure, accessible, and high-quality documents. Together, these updates reinforce our mission to support your organization's digital transformation with solutions that are powerful, secure and inclusive.

Happy templating.

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Accessibility Validation for PDF Documents

Experlogix now supports the creation and validation of accessible PDF documents, enabling organizations to deliver inclusive, compliant, and user-friendly digital content. These enhancements help customers meet global accessibility standards such as the European Accessibility Act (EAA) and the Americans with Disabilities Act (ADA) while fostering inclusivity and equal access to information.

Benefits

The PDF/UA (Universal Accessibility) specification defines the standard for accessible PDFs. A PDF/UA-compliant document is a *tagged PDF*, one that contains a structured, semantic representation of its content. This structure allows assistive technologies such as screen readers and magnifiers to interpret, navigate, and vocalize the content correctly.

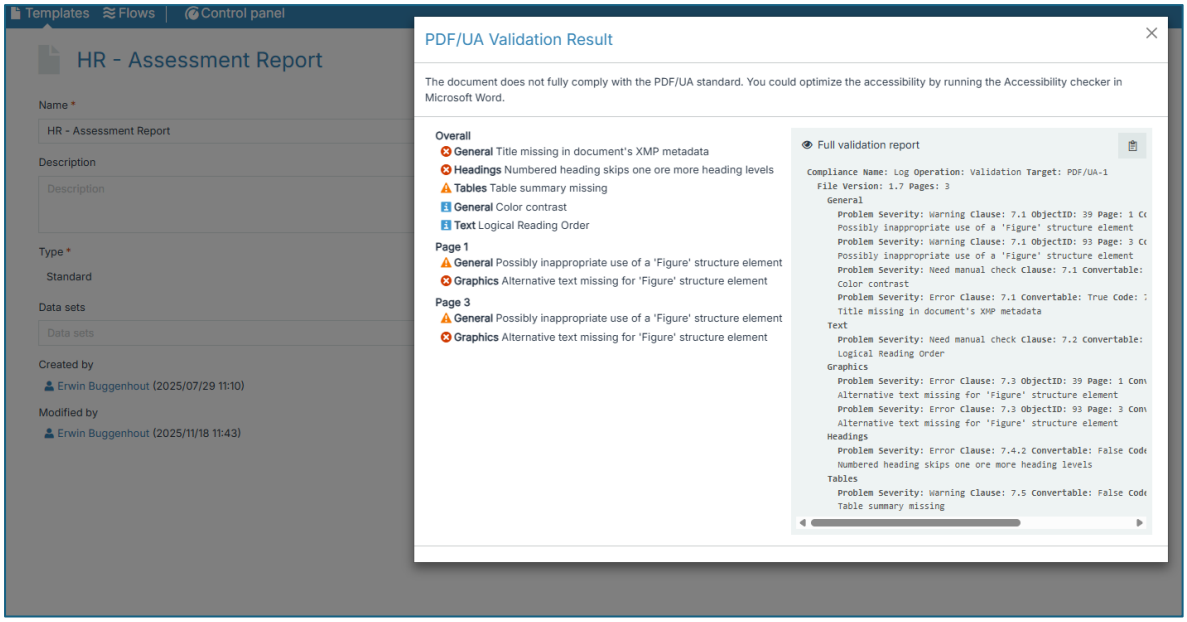
With support for PDF/UA validation during both design time and runtime, Smart Flows helps organizations:

- Ensure generated documents comply with accessibility standards from the start
- Detect and resolve accessibility issues early in the document lifecycle
- Automate compliance enforcement in document workflows
- Strengthen inclusivity and improve the user experience for all audiences

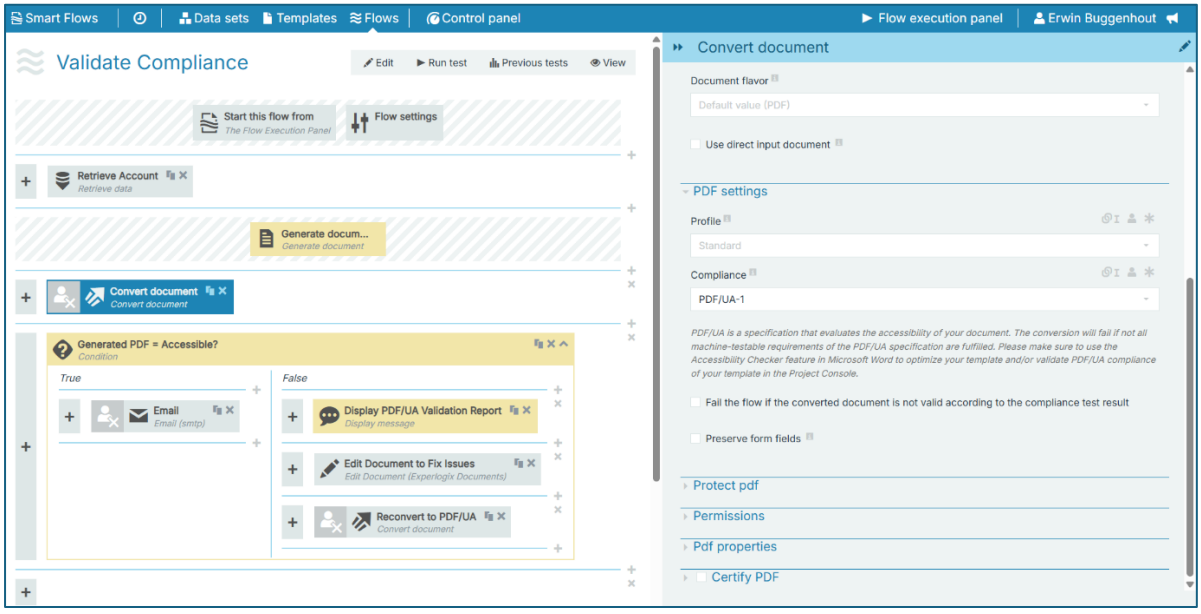
Accessibility is about more than compliance. It's about creating equitable access and reinforcing your organization's commitment to digital inclusion.

Feature Takeaways

Design-Time PDF/UA Validation: The Template Preview in the Project Console now includes a built-in PDF/UA compatibility validator. Designers can preview templates and immediately check whether resulting documents meet accessibility requirements. Any structural or tagging issues are surfaced early, helping to ensure compliant design before production.



Runtime PDF/UA Validation: The Convert Document flow step now includes a PDF/UA validation option. When enabled, this feature validates the generated PDF against the PDF/UA standard and outputs a validation result, indicating whether the document passed or failed accessibility testing.



Conditional Flow Logic Based on Validation Results: The validation result output allows flow designers to implement conditional logic based on the test outcome. For example, you can:

- Block delivery of non-compliant PDFs to customers
- Route failed validations to internal quality checks or remediation workflows
- Notify compliance owners automatically if accessibility validation fails

This ensures accessibility enforcement becomes an integral part of every outbound document flow, embedding compliance and inclusivity into standard document processes.

Flow Execution Parameters for Templates and Flows

Experlogix Smart Flows now exposes **Flow Execution Parameters** for use both within **templates** and **flows**, giving designers and administrators new ways to display contextual information, automate decisions, and improve traceability across generated documents. These parameters capture key details about each flow execution, the user who initiated it, and the project context, unlocking richer document personalization and smarter flow logic.

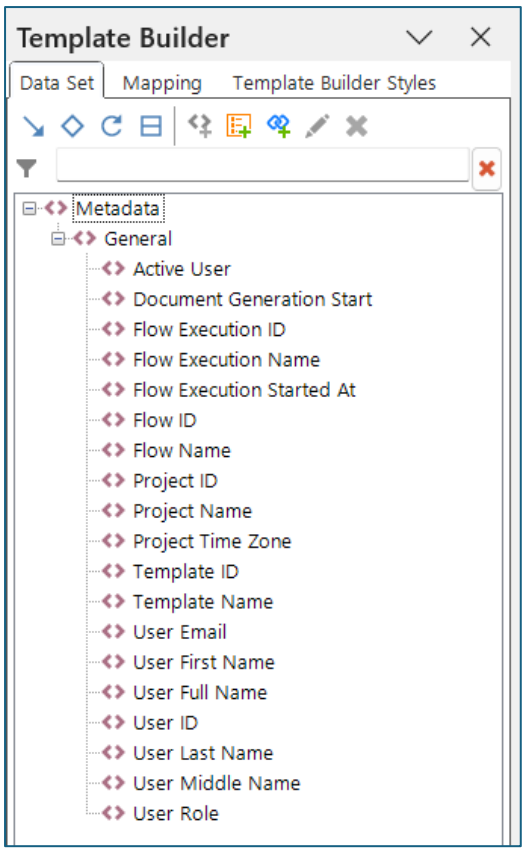
Benefits

This feature introduces a powerful source of contextual metadata for both document template and flow designers. Document designers can now incorporate execution context directly into generated documents - for example, stamping documents with unique execution identifiers, audit details, or the identity of the flow initiator. Flow builders can leverage these parameters to drive conditional logic, tailor user journeys, and enforce governance controls.

The result is greater transparency and more robust auditing across document processes.

Feature Takeaways

Execution Parameters Available in Templates: Designers can now reference execution parameters directly within Template Builder templates.

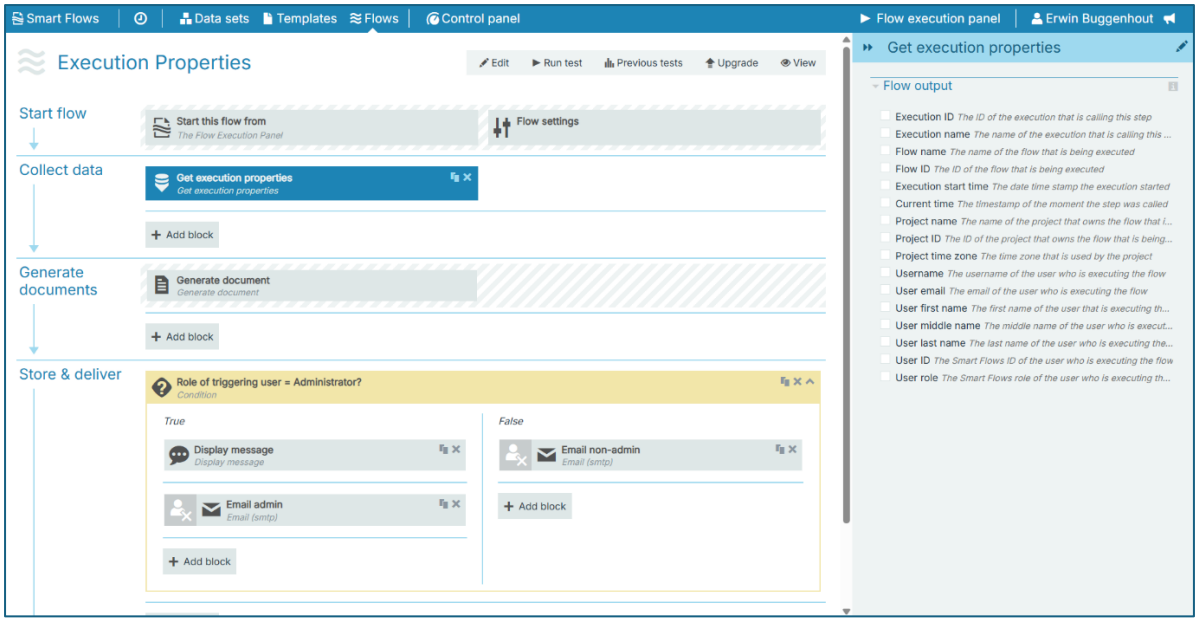


This enables scenarios such as:

- Displaying the flow execution ID
- Showing who initiated the process and when
- Adding project or flow name metadata for traceability
- Including timestamps or contextual markers for lifecycle events

These parameters help ensure that generated documents remain self-describing and fully traceable.

Execution Parameters Available in Flow Builder: Execution parameters can now be used as input values or conditions inside Flow Builder, enabling more dynamic and context-aware flows.



With a new flow block to “Get execution properties”, flow designers can:

- Branch logic based on the user’s role or email domain
- Trigger additional approvals or reviews depending on when or by whom the flow was started
- Log execution metadata for audit or analytics purposes
- Combine execution metadata with business data for downstream integrations

User Tagging

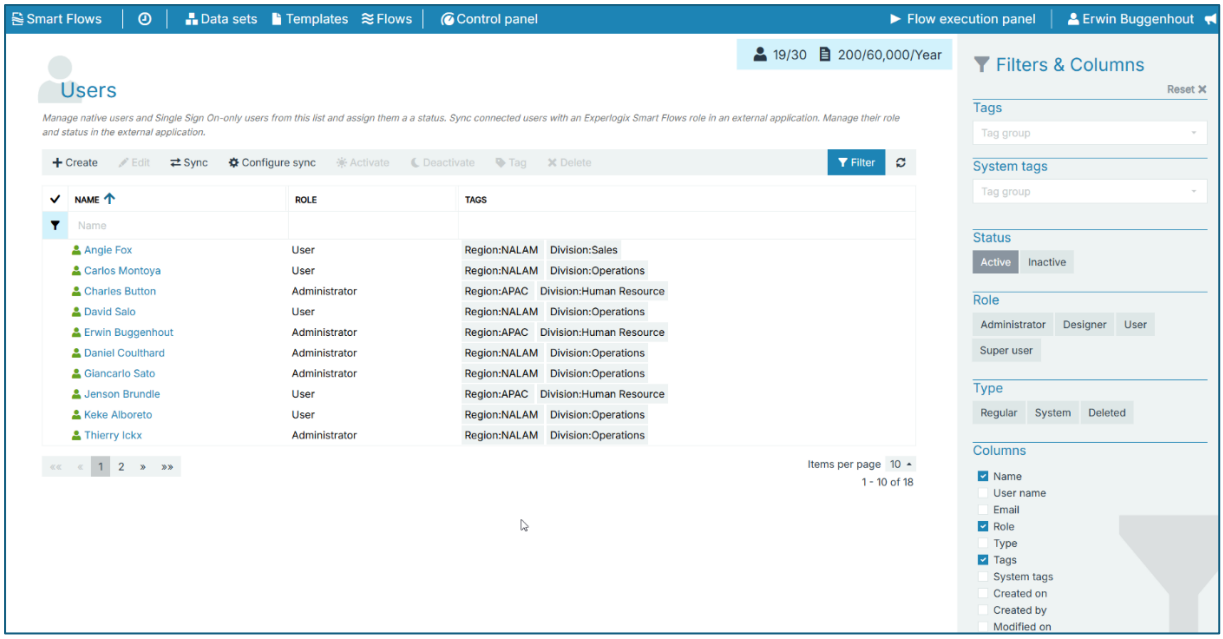
Experlogix Smart Flows now supports **user tagging**, allowing administrators to categorize and organize users through customizable **tags** and **tag groups**. This new capability improves user management, strengthens governance, and lays the foundation for more powerful analytics and reporting across your Smart Flows deployment.

Benefits

User tagging enables administrators to classify users based on business-specific attributes such as division, department, location, or role. A tag group represents a category (for example, *Business Division*), and the tags within that group represent the values (such as *Sales*, *Marketing*, *HR*, *Operations*).

This structure not only simplifies user organization, it also provides meaningful segmentation for insights into usage patterns, volume consumption, and system adoption. As Smart Flows

continues to expand its reporting capabilities, tags will become a key mechanism for understanding how different areas of the organization interact with automated document processes.



Feature Takeaways

Flexible Tag Groups and Tags: Administrators can create any number of tag groups and populate them with tags that reflect their organization's needs. A user can be assigned multiple tags across different groups - for example, *"Sales"* in the *Business Division* group and *"North America"* in the *Region* group.

Improved User Organization: Tags help structure large user bases, making it easier to locate, audit, and manage users across the platform. They allow teams to define meaningful groupings without relying solely on roles or project assignments.

Foundation for Advanced Reporting: User tagging is a key enabler for the advanced reporting and analytics features currently under development. Future dashboards will display volume consumption, execution trends, and adoption rates broken down by tag group and tag, offering deeper insights into how Smart Flows is used across the organization.

Supports Governance and Optimization: By understanding which categories of users generate the most volume, administrators can optimize license usage, tailor training, and improve operational efficiency with data-driven decisions.

OAuth and Individual User Authentication for HTTP Connectors

Experlogix Smart Flows now supports **OAuth-based authentication for HTTP connectors** and enables users to authenticate **individually** when a flow interacts with an external system. This enhancement provides stronger end-to-end security, more granular auditing, and improved compliance for organizations integrating Smart Flows with external APIs or web services.

Benefits

With this release, Smart Flows adopts a modern OAuth authentication flow for HTTP connectors and allows the initiating user to authenticate at runtime. When a flow step makes a web service call through an OAuth-enabled connector, Smart Flows prompts the user who started the flow to authenticate against the connected system. Tokens are securely stored for convenience and reused when appropriate, minimizing repeated prompts while maintaining user-level authorization.

This mechanism ensures that external systems can validate not just that Smart Flows is authorized, but that the specific user executing the flow is permitted to perform the requested operation. Like that, system administrators can enforce stricter security policies, improve traceability across integrated systems, and align Smart Flows with enterprise-grade identity and access management practices.

Feature Takeaways

OAuth Support for HTTP Connectors: HTTP connectors now support industry-standard OAuth authentication flows. Administrators can configure connectors to authenticate against external systems using secure OAuth endpoints, enabling modern, policy-aligned integrations without additional scripting.

Individual User Authentication at Runtime: When a flow step calls the connector, the user who initiated the flow is prompted to authenticate. This ensures that the external system receives a request tied to the identity and authorization scope of that individual user.

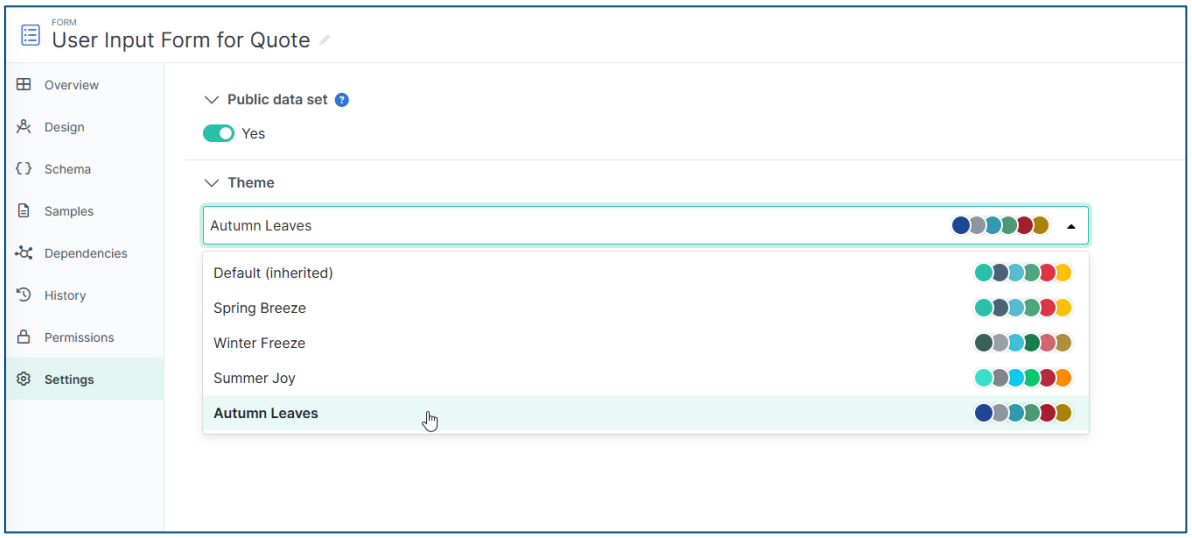
Token Storage for Convenience: Tokens obtained during authentication are securely stored and reused when valid, minimizing repeated prompts while maintaining proper authorization.

Improved Security and Auditability: By correlating each external call with a specific authenticated user, Smart Flows strengthens end-to-end traceability. Administrators gain clearer visibility into who performed which actions across connected systems.

Support for Stricter Security Policies: Organizations can now configure external systems with more restrictive access controls, confident that Smart Flows can authenticate users individually rather than relying on shared system accounts or fixed credentials.

Form-Level Theming

Experlogix Documents now supports the ability to apply **themes directly at the form level**, allowing designers to customize form appearance with preset color patterns. This capability helps organizations align forms with specific branding guidelines, support multi-brand environments, and improve accessibility through color combinations optimized for contrast and readability.



Benefits

Many organizations manage multiple brands or business units, each with distinct visual identities. With form-level theme support, Experlogix Documents enables designers to apply color patterns that match corporate brand guidelines, ensuring forms inherit the correct look and feel based on the brand they represent.

This feature also supports accessibility best practices by allowing designers to select high-contrast color combinations that improve readability for all users, including those with visual impairments. Forms can now be tailored not just for branding accuracy but also for clarity and inclusiveness.

Whether you need a sleek corporate palette, a vibrant retail brand look, or a simplified high-contrast theme, form-level theming ensures that forms remain visually consistent, accessible, and aligned with organizational standards.

Feature Takeaways

Form-Level Theme Assignment: Designers can now apply a theme directly to a form, selecting from preset color patterns defined within the project. The setting overrides the default color pattern of the project for the active form. This ensures immediate visual alignment without complex styling or manual adjustments.

Support for Multi-Brand Environments: Themes allow organizations managing multiple brands to maintain accurate visual identity across all forms. Each form can reflect the correct branding simply by selecting the appropriate theme.

Accessibility-Focused Color Options: Themes can be designed to meet accessibility guidelines by offering higher-contrast color combinations for improved legibility and usability.

Future Expansion: This feature builds on previously released global theming options and will expand over time to include dynamic theme selection at runtime, allowing business rules to determine the correct theme automatically.

Smaller Improvements

As always, there are also a number of smaller improvements in this release. Some important updates include:

Accessibility improvements in the Flow Execution Panel: Several technical enhancements optimize the Flow Execution Panel for screen readers and other assistive technologies. Next to those, the panel now has a high contrast mode. Users can enable it in the UI settings sections of the panel to maximize readability throughout the flow execution experience.

Import of data sets between Experlogix Documents projects: Experlogix Documents now supports import of data sets with all their dependencies. With this capability, privileged users can now move data sets from one stage to another in the application life cycle. For convenience, the import process is managed via a user-friendly wizard that handles conflicts, versioning and data set dependencies.

Convenience optimizations for Microsoft SharePoint connector setup: A generic Smart Flows App Registration is now available for Azure EntraID, allowing administrators to create a Microsoft SharePoint connector without manually creating app registrations in Microsoft Azure. This reduces the complexity of configuring a Smart Flows connector to Microsoft SharePoint.

Conversion of RGB images to the CMYK color space in high-quality PDF output: When a flow block converts a generated Word document into a high-quality PDF file, embedded images can now optionally be converted from the RGB to the CMYK color space. This may be helpful to meet professional printing requirements.

Various performance improvements: The 4.26 release of Experlogix Smart Flows contains updates that increase performance. Optimizing the use of the template cache positively impacts performance for compositions with a large number of sub templates, while enhancing the retry mechanism eliminates unnecessary queuing.

Optimized invitation flow for existing users in Experlogix Documents: When inviting an existing user to a new project or organization, the user now receives an email notification about the changes.

Release Notes and Release Artefacts

- Experlogix Documents 1.0.0-preview Release Notes
- Experlogix Smart Flows 4.26 Release Notes
- Experlogix Smart Flows 4.26 Release Artefacts
- Experlogix Smart Flows Version Compatibility Matrix

About Experlogix

The Experlogix product suite offers purpose-built business applications that accomplish a shared goal – making it easier for your clients to engage with and buy from you. No matter how complex your business or products are, our seamless integrations and low-code/no-code configurability create outstanding digital experiences for your buyers, clients, distributors, and dealers. Headquartered in the United States and the Netherlands, Experlogix enables clients worldwide to achieve unprecedented efficiency while doing more to engage and impress their customers. Learn more about our Configure, Price, Quote (CPQ), Document Automation and Digital Commerce solutions at experlogix.com

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