Component Plugin for **Appian**

Appian Corporation

Version 1.0.0

Table of Contents

Overview 3

Prerequisites 3

Key Features and Functionality 3

Component: smartcommDraftEditorField() 4

Editing Drafts 5

Saving Drafts 6

Overview

The SmartCOMM Draft Editor enables users to effortlessly add and edit text and pre-approved content from existing templates. This functionality allows users to preview the appearance of documents generated from SmartCOMM templates in real-time. The Draft Editor offers a browser-embedded, on-demand editing experience where users can interact with templates, make necessary adjustments, and see a live preview of draft documents before final submission and generation.

The primary purpose of the Draft Editor is to simplify the process of adding or editing text and pre-approved content within existing SmartCOMM templates. This ensures users can visualize the final appearance of generated documents, providing a streamlined and efficient document preparation process.

Prerequisites

- Download and configure the SmartCOMM Connected System found on the Appian App Market.

Key Features and Functionality

- **On-Demand Template Editing**: The Draft Editor is a browser-embedded feature that provides an on-demand template editor. It allows users to work with templates directly within their forms. The fields and content within the template editor are pre-populated by the template placeholders linked to preceding questions.

- **Draft Documents**: Users can see and edit templates as draft documents before submitting a form and generating the final documents. This feature is particularly useful for reviewing and fine-tuning content before it becomes official.

- **Download Generated Documents**: Users can download the document generated from the Draft in their Browser or to the Appian Knowledge Center using the 'Generate Document Integration' in the SmartCOMM Connected System.

Note:
Users are required to log in with their SmartCOMM credentials in order to use the component.

Component: smartcommDraftEditorField()

Please see below for the various parameters associated with this component.

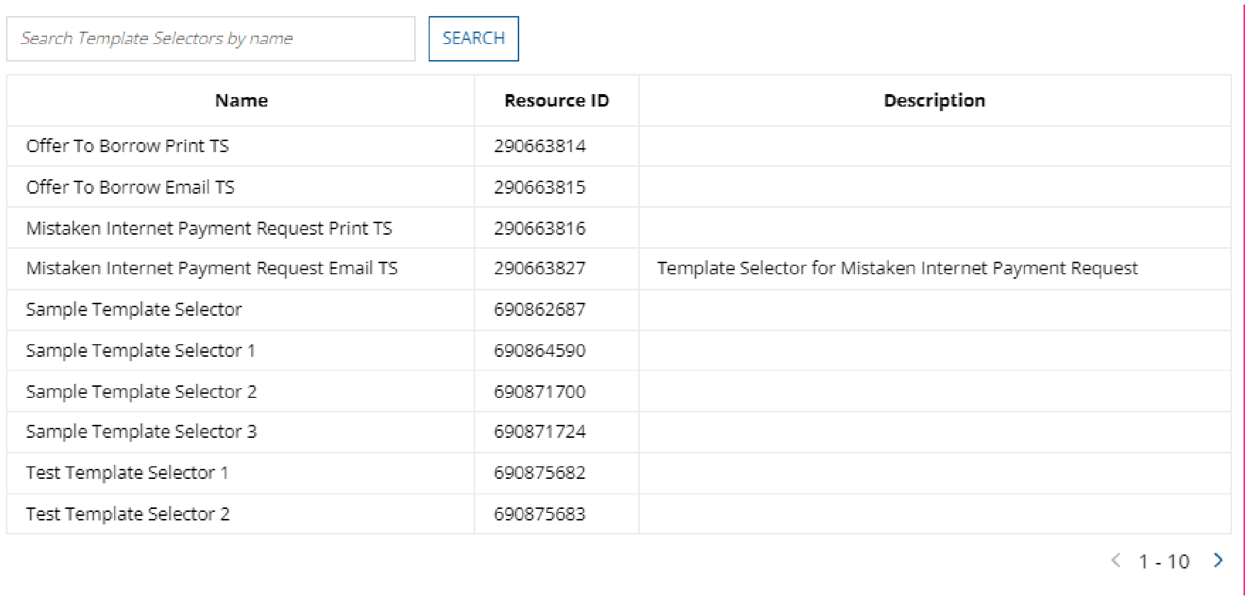
Parameters

Name	Type	Description	Required
smartcommsConnectedSystem	Connected System	Provide the SmartCOMM Connected System constant reference	Yes
showSearchBar	Boolean	Boolean to toggle visibility of the Search Bar. Defaults to true.	No
draftInput	Text	Provide either Resource Id of the template or the XML String of the draft to be edited.	When showSearch bar is false
onDraftSave	List of Save	One or more variables that are updated when the user clicks on the save button. The save button is present on the top left of the draft editor icon tray. This event is triggered when ● A draft is loaded initially in the draft editor. ● The save button is clicked.	No
showGenerateDocumentButton	Boolean	Boolean to toggle visibility of the Generate Document Button. This button will download the generated document to the user's desktop. To save the document to the Appian Knowledge Center, configure a separate button to trigger the "Generate Document" integration. More information can be found within the documentation. Defaults to true.	No

Editing Drafts

Loading drafts into the editor can be done in two ways:

1. Providing true to ‘showSearchBar’ parameter and null to ‘draftInput’: Users can search through the templates present in the CMS and click on the result to load the template in the Draft editor.



Search Template Selectors by name | SEARCH

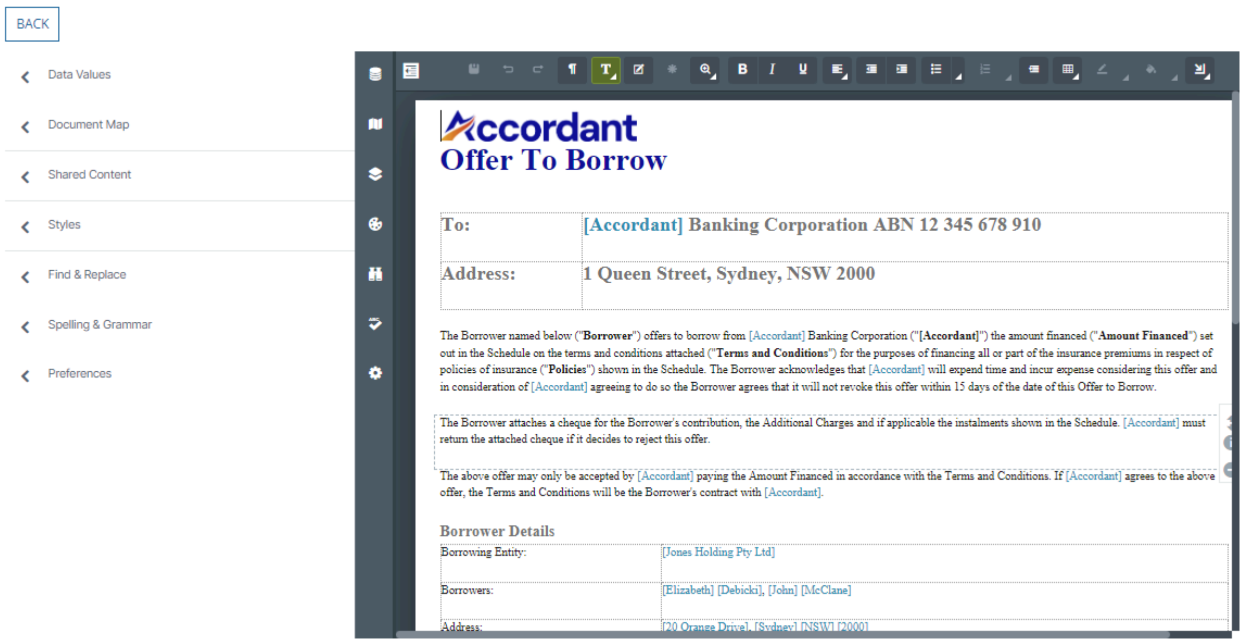
Name	Resource ID	Description
Offer To Borrow Print TS	290663814	
Offer To Borrow Email TS	290663815	
Mistaken Internet Payment Request Print TS	290663816	
Mistaken Internet Payment Request Email TS	290663827	Template Selector for Mistaken Internet Payment Request
Sample Template Selector	690862687	
Sample Template Selector 1	690864590	
Sample Template Selector 2	690871700	
Sample Template Selector 3	690871724	
Test Template Selector 1	690875682	
Test Template Selector 2	690875683	

1 - 10

2. Providing values to 'draftInput' parameter: The 'draftInput' parameter can accept one of the following values:

    a. Template Selector Resource ID: By providing the resource ID of the Template Selector, the contents of the selected template will be loaded into the Draft Editor.
    b. Draft XML Text: We can provide Draft XML to the parameter to load the XML directly in the Draft Editor.

    Note: If 'showSearchBar' is set to true while 'draftInput' is provided, the back button will be shown to enable users to navigate to other templates.



Accordant
Offer To Borrow

To:	[Accordant] Banking Corporation ABN 12 345 678 910
Address:	1 Queen Street, Sydney, NSW 2000

The Borrower named below ("**Borrower**") offers to borrow from [Accordant] Banking Corporation ("**[Accordant]**") the amount financed ("**Amount Financed**") set out in the Schedule on the terms and conditions attached ("**Terms and Conditions**") for the purposes of financing all or part of the insurance premiums in respect of policies of insurance ("**Policies**") shown in the Schedule. The Borrower acknowledges that [Accordant] will expend time and incur expense considering this offer and in consideration of [Accordant] agreeing to do so the Borrower agrees that it will not revoke this offer within 15 days of the date of this Offer to Borrow.

The Borrower attaches a cheque for the Borrower's contribution, the Additional Charges and if applicable the instalments shown in the Schedule. [Accordant] must return the attached cheque if it decides to reject this offer.

The above offer may only be accepted by [Accordant] paying the Amount Financed in accordance with the Terms and Conditions. If [Accordant] agrees to the above offer, the Terms and Conditions will be the Borrower's contract with [Accordant].

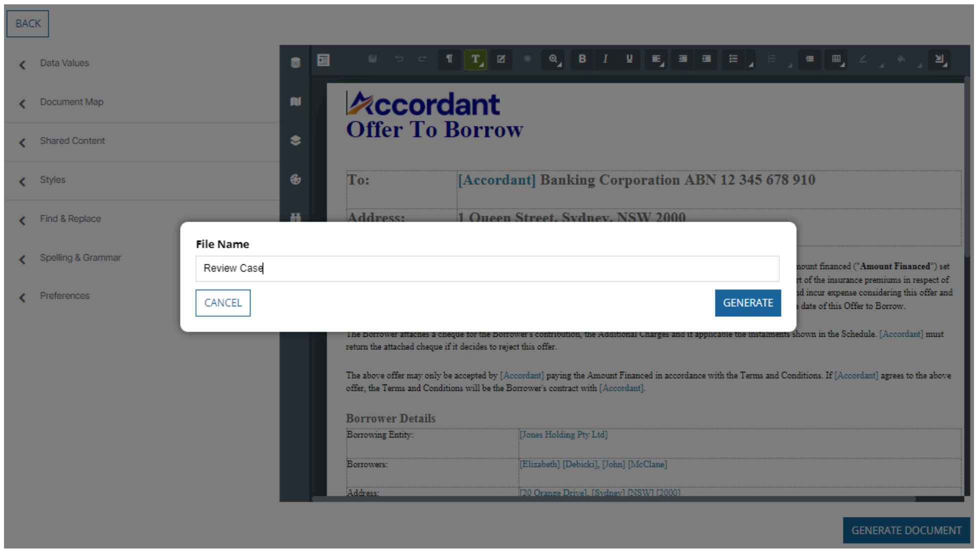
Borrower Details

Borrowing Entity:	[Jones Holding Pty Ltd]
Borrowers:	[Elizabeth] [Debicki], [John] [McClane]
Address:	[20 Orange Drive], [Sydney] [NSW] [2000]

Saving Drafts

Once the user has finished editing, the draft can be downloaded by its specified channel formats like PDF, HTML and other formats by using either the Generate Document Integration or Generate Document Functionality in the component.

- Generate Document Button: By clicking on the "Generate Document" button in the component, the document will be downloaded to the user's browser. Users will be prompted to enter the file name of the generated document.



File Name
Review Case

Accordant
Offer To Borrow

To:	[Accordant] Banking Corporation ABN 12 345 678 910
Address:	1 Queen Street, Sydney, NSW 2000

...ount financed ("**Amount Financed**") set ...t of the insurance premiums in respect of ...d incur expense considering this offer and ... date of this Offer to Borrow.

The Borrower attaches a cheque for the Borrower's contribution, the Additional Charges and if applicable the instalments shown in the Schedule. [Accordant] must return the attached cheque if it decides to reject this offer.

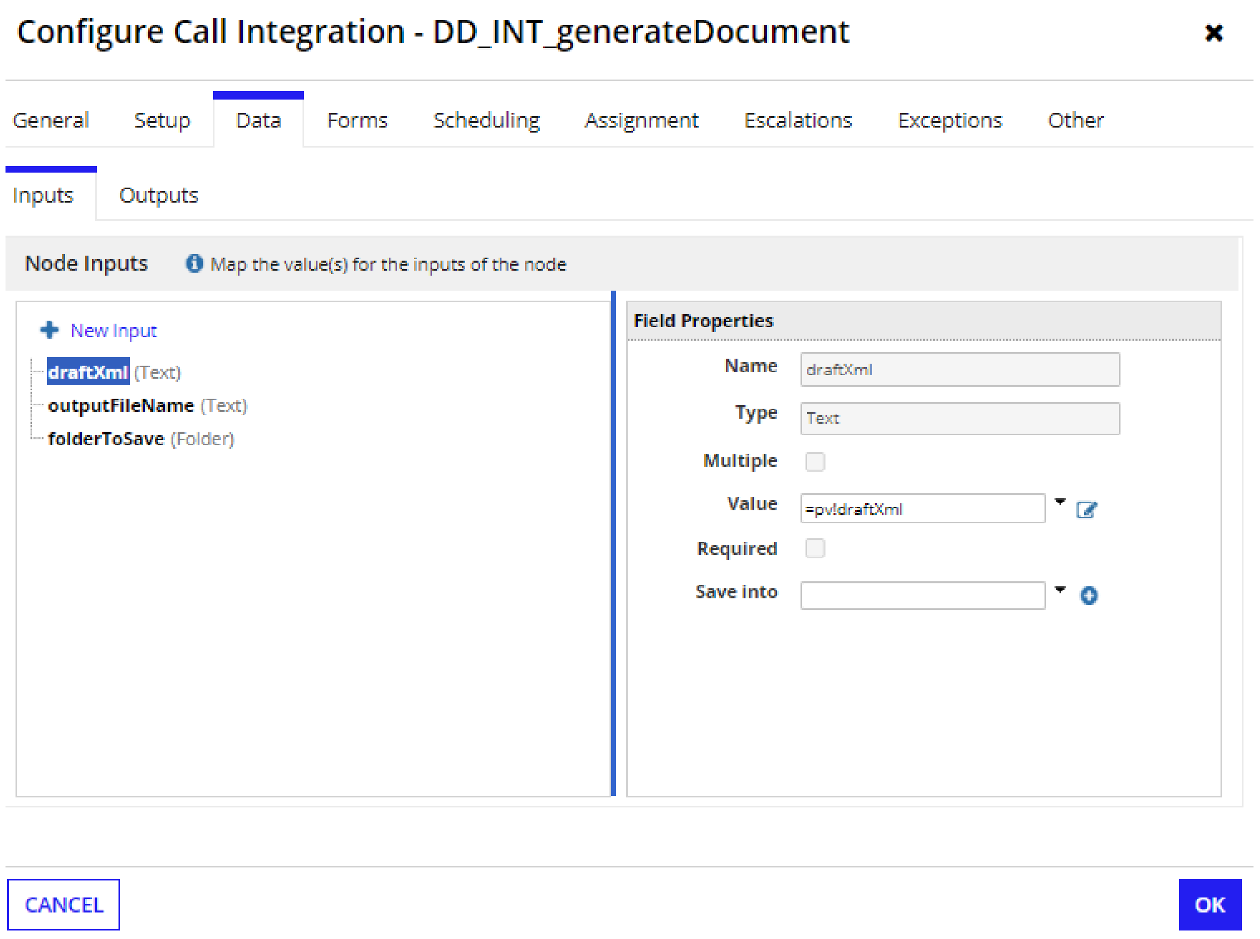
The above offer may only be accepted by [Accordant] paying the Amount Financed in accordance with the Terms and Conditions. If [Accordant] agrees to the above offer, the Terms and Conditions will be the Borrower's contract with [Accordant].

Borrower Details

Borrowing Entity:	[Jones Holding Pty Ltd]
Borrowers:	[Elizabeth] [Debicki], [John] [McClane]
Address:	[20 Orange Drive], [Sydney] [NSW] [2000]

- Generate Document Integration: The edited draft can be saved into Appian's Knowledge Center with the help of this integration. Users need to configure an integration node in their process model in order to save the generated document into Appian. Set the showGenerateDocumentButton to false and configure a SAIL button to trigger the Generate Document Integration.

Note: SmartCOMM limits the number of pages to 150 for PDF type template selectors. Exceeding the content limit of 150 pages will throw an error while downloading.



draftXml (Text)
outputFileName (Text)
folderToSave (Folder)

Field Properties

Name	draftXml
Type	Text
Multiple	☐
Value	=pv!draftXml
Required	☐
Save into	