InfoIQ Administrator and User Guide

Installing, configuring and operating internal announcements inside Salesforce — and reading the numbers that come back.

Package namespace aas

Salesforce API version 65.0

Supported editions Enterprise, Unlimited, Developer

Applies to administrators, announcement authors, analytics readers

Contents

PART ONE

Install and configure

Everything an administrator does once, before anybody writes an announcement. Roughly thirty minutes, most of it deciding where the reader component belongs.

1 What InfoIQ does

InfoIQ publishes internal announcements to the people who should see them, inside Salesforce, and reports honestly on how far each one travelled.

An author builds a multi-page announcement, targets it with rules, and publishes it. Readers receive it on the page they are already working on — a record, the home page, or anywhere the utility bar follows them. They read it, they can ask the author a question, and every step is recorded: served, opened, how many pages they got through, where they stopped.

Three things worth knowing up front

Nothing leaves your org. InfoIQ is a managed package built entirely on the Salesforce Platform. Announcements, reading states and analytics are records in your own org, under your own backup and retention policy. There is no external service, no middleware and no vendor cloud holding a copy.

An announcement is never pushed over what a reader is doing. The component resolves what a reader is entitled to and renders a small card. Opening it is the reader's move. This is a product decision, not a limitation: an announcement that seizes the screen is an announcement people learn to dismiss without reading.

Empty means everyone. An announcement with no targeting rules, an audience with no criteria, and an announcement in audience mode pointing at no audience all reach everybody holding an InfoIQ seat (section 3). Emptiness is never read as a restriction. Section 7 covers what the authoring path does to keep you from reaching that state by accident.

> **VOCABULARY USED THROUGHOUT**
>
> An **author** or **manager** builds and publishes announcements and reads analytics. A **reader** or **recipient** receives them. An **audience** is a named, reusable set of targeting criteria shared by several announcements.

2 Before you install

Two prerequisites, and a short inventory of what arrives with the package.

Prerequisites

REQUIREMENT	WHY
Permission set groups enabled	The `Announcement_Administrator` persona is a permission set group, not a permission set. Groups are packageable and do not count against your group limit, but the org must have the feature enabled to install or uninstall the package.
Enterprise, Unlimited or Developer edition	Custom objects, permission sets and Lightning App Builder are all required.

What the package brings

COMPONENT	DETAIL
Lightning app	InfoIQ, with Home, Analytics, Audiences, Announcements and Announcement Questions
Custom objects	12, covering announcements, pages, targeting rules, audiences, reading states, questions, analytics snapshots and the diagnostic log, plus one platform event that carries diagnostics out of a rolling-back transaction
Permission sets	4, plus 1 permission set group – section 3
Lightning component	Announcement Host, the one component you place yourself – section 4
Record actions	Publish, Unpublish, Archive and Delete on the announcement record page, each shown only when it applies – section 8
Notification type	Announcement Response, which tells a reader their question was answered – section 9
Scheduled job	One `Schedulable`, for log retention. The package does not schedule it – section 5

> **STORAGE**
>
> Reading states and diagnostic log rows sit in your org's data storage, and files attached to announcement pages in your file storage. Both grow with use. Section 14 covers retention, section 15 covers files.

3 Granting access

Four permission sets and one group. Assign the set that matches what a person does — never more.

ASSIGN THIS	TO
Announcements User	Everybody who should *receive* announcements. Grants read on the announcement, its pages and its rules, plus the My Questions tab. Nothing else.
Announcements Manager	People who write, target, publish and measure. Grants the InfoIQ app, the builder, the audience library and the analytics tabs.
Announcement Log Access	Whoever troubleshoots. Grants the diagnostic log and nothing else — see the warning below.
Announcement Administrator (permission set group)	Composed of the three above. Assign this rather than assigning them one by one: a field added to a member set reaches this persona on its own.
Announcement Data Import	**Not a persona.** One custom permission that bypasses the validation rules, for a migration. Granted for the run, taken back after — section 5.

Seats: who can be reached

InfoIQ is licensed per seat. A user holds a seat when they can reach the component readers use, whether through Announcements User, Announcements Manager, the Administrator group, a permission set group of your own or a profile. Announcement Log Access and Announcement Data Import grant no seat.

Seat holders are the whole population InfoIQ works with. Targeting, audience estimates and analytics only count them, and a user without a seat never receives an announcement, whatever its rules say. To reach more people, assign Announcements User to them. Rules cannot do it.

What a reader can and cannot see

A reader holds read access on `Announcement__c`, `Announcement_Page__c` and `Announcement_Rule__c`, and a *Read* share on the announcements they were sent. They hold **no object access at all** to reading states or to questions.

That is deliberate. The children of an announcement are controlled by its parent, so any object permission on them would let a reader enumerate who read what, and read the questions their colleagues asked the author privately. The two reads a recipient is entitled to — the published answers, and their own row — are served by the package's own Apex instead.

> **DO NOT WIDEN THE READER SET**
>
> Granting `Announcement_User_State__c` or `Announcement_Question__c` to readers turns a private exchange into a directory of who read what. If a report needs those figures, give the reporting user the Manager set.

The diagnostic log is separate on purpose

`Announcement_Log_Access` is the only set that grants the log, and it exists so the administrator persona can be composed rather than duplicated. Stack traces and the identity of whoever hit an error are an operator artefact: an author who could read them would learn what their colleagues were doing.

4 Placing the reader component

One component, four possible homes. This is the only placement decision the package leaves to you, and it decides where announcements appear.

In Lightning App Builder, the component is called **Announcement Host**. It resolves what the current user is entitled to on the current page and renders a card offering *Read* or *Later*. Reading itself opens in a platform modal at application level.

Later only hides the card, which comes back on the reader's next page. Each reader gets one reading. Reaching the end marks it *Completed*. Closing it partway marks it *Dismissed* and records the page they stopped on. After either one, the announcement is not offered to them again. When several announcements are live for the same reader, the card offers the highest priority first, then the one that started earliest.

PLACEMENT	BEHAVIOUR
Utility bar	**The usual choice.** The component follows the user across every page of the app, so an announcement finds them wherever they are working rather than only on one screen.
Record page	The Page Type criterion can name objects, so a message about cases appears on case pages only. Place it in a column where a card does not push the record layout around.
Home page	Reaches people at the start of their session, but only if they pass through Home.
App page	For a dedicated internal-communications page, if you have one.

Properties

PROPERTY	USE
Custom Identifier	A free-text label for this placement. The Custom Identifier criterion matches it, which is how you send a message to one specific spot rather than to a page type.

That is the only property. The component has no display mode and no debug switch: an announcement is never opened on the reader's behalf, so there is one behaviour and nothing to pick between.

> **THE OTHER INFOIQ COMPONENTS IN THE PALETTE ARE NOT FOR YOU**
>
> Lightning App Builder lists nine components under the InfoIQ namespace. Only Announcement Host is meant to be placed by an administrator. The other eight are the screens the app builds itself – the home page cards, the targeting editor, the metrics panel – and they appear in the palette only because Salesforce requires a component to be exposed before it can sit on a page, including the package's own. Dropping one of them elsewhere will not break anything, but it will show nothing useful.

> **PLACE IT ONCE PER APP, NOT ONCE PER PAGE**
>
> If the component sits in the utility bar *and* on the home page of the same app, a reader arriving on Home can be offered the same announcement twice. Pick one placement per app unless a record-page placement is deliberately targeting a different message.

5 Optional configuration

Two things the package leaves switched off, and why.

Schedule the log purge

The diagnostic log is not a child of any announcement, so nothing cascades it away. One purge runs automatically when an announcement is deleted and takes its entries with it. The other has to be scheduled, and it is the one that catches entries naming no announcement and announcements nobody ever deletes.

```
System.schedule(
    'Announcement Log Purge',
    '0 0 3 * * ?',
    new aas.AnnouncementLogPurgeSchedule()
);
```

It drops anything older than **30 days**. The package does not schedule this for you: logging works either way, and a job a subscriber did not ask for is a job they did not expect to find.

The bypass permission

`Announcement_Data_Import` carries one custom permission, `Bypass_Announcement_Validations`. It lets a save ignore thirteen of the fifteen validation rules in section 16 — including the ones that stop a publication date being backdated — so that imported announcements keep the dates they actually went out on. The other two still apply, because they keep dates coherent rather than current: a publish end cannot fall before its start, and a last publish date cannot fall before the first.

> **GRANT IT FOR THE RUN, THEN TAKE IT BACK**
>
> Bypassing validation is a migration tool, not an administrator right. It is deliberately not a member of the Administrator group. The package's own test suite asserts that the running user does *not* hold it, because a test run that holds a bypass fails later for the wrong reason and reads as a different bug.

PART TWO

Author an announcement

What a manager does: compose the content, decide who receives it, publish it, and answer what comes back.

6 Creating and composing

An announcement is a title and an ordered list of pages. Nothing else is required to start.

Three ways to start

MODE	WHAT HAPPENS
From scratch	An empty announcement. You add pages one at a time.
From another announcement	Copies the content of an existing one. Useful for a recurring message; the targeting is not carried over.
From a slide deck	Upload a `.pptx` and every slide becomes one page, in order – section below.

Page types and accepted files

PAGE TYPE	ACCEPTED FORMATS	NOTES
Text	–	Rich text, written in the builder
Image	`.png` `.jpg` `.jpeg` `.gif` `.webp`	Uploaded to Salesforce files
Video	`.mp4` `.mov` `.webm` `.ogg` `.m4v`	Uploaded to Salesforce, not linked. The builder has no field for an external URL: the video is a Salesforce file, so it obeys your own sharing and retention.

Importing a deck

A `.pptx` is a ZIP of XML parts, so InfoIQ counts the slides it contains and creates one page per slide. **Nothing is converted.** Each page shows the picture Salesforce itself renders for its file preview – the slide, pixel for pixel, with its layout, its fonts and its diagrams intact. Rebuilding a slide as HTML would lose all three.

AN IMPORT REPLACES THE CONTENT

Importing a deck empties the announcement first, then rebuilds it from the slides. It is only possible while the announcement is a **Draft**. If the file carries no slide, or cannot be read, the import is refused and the announcement is left alone.

Priority

Five levels: Low, Medium, High, Urgent, Critical. Priority decides the order: when several announcements are live for the same reader, the highest is offered first. **Critical** also changes what the reader sees. The card is marked, and the *Later* button is removed, because leaving a way out on the one announcement that must not wait would say the opposite of what the surface means.

Questions on or off

Allow questions in the builder is on by default. Turn it off for an announcement that should not start a conversation, and readers get no way to ask one — section 9.

7 Choosing who sees it

Two mutually exclusive modes. An announcement targets by criteria written on itself, or by one or more reusable audiences — never both.

The eight criteria

CRITERION	MATCHES ON
Profile	The reader's profile
User	Named users, one by one
Role	The reader's role in the hierarchy
Group	Membership of a public group
Queue	Membership of a queue
Application	The Lightning app the reader is currently in
Page Type	The kind of page they are on (home, record or app page), and on a record page optionally which objects
Custom Identifier	The label set on a specific component placement — section 4

Each criterion takes an operator, **IN** or **NOT IN**, and a set of values. Criteria are then combined by the announcement's logic mode.

Combining them

LOGIC MODE	MEANING
Any	Matching one criterion is enough
All	Every criterion must match
Custom	A written expression over the numbered criteria, for example `1 AND (2 OR 3)`. The expression is mandatory in this mode and the save is refused without it.

> **THE LAST THREE CRITERIA BEHAVE DIFFERENTLY**
>
> Application, Page Type and Custom Identifier describe *where* a reader is, not who they are. When InfoIQ estimates an audience there is no page to speak of, so these criteria are neutral in the estimate — the figure stays a count of people rather than of screens.

Estimate audience in the Targeting tab counts the seat holders the targeting reaches right now, in either mode. Run it before publishing: it is the figure publication will freeze.

Reusable audiences

An audience is a named set of the same criteria, kept in the Audiences tab and shared across announcements. Attaching several to one announcement combines them with a plain **OR**: belonging to any one of them is enough. There is no operator on an audience and no nesting.

Audiences are **private**: an author builds their own library and does not see anybody else's. Delivery and the audience estimate read them regardless of who owns them, because an announcement targeted through an audience nobody can see would otherwise resolve to no criteria — and since empty restricts nothing, it would go org-wide instead of to its audience.

> **AN AUDIENCE HELD BY A PUBLISHED ANNOUNCEMENT IS LOCKED**
>
> Targeting freezes when an announcement leaves Draft, because the audience size is measured at publication. A shared audience would walk around that freeze, so editing one that a live announcement points at is refused. Duplicate it and edit the copy.
>
> For the same reason the database refuses to delete an audience a live announcement still holds. This is a constraint on the link record, not application code — it cannot be bypassed by a Flow or an API call.

8 Publishing

Four statuses, and fifteen validation rules that between them describe exactly what is allowed.

The four statuses

STATUS	MEANING
Draft	Being written. Content, targeting and logic are all editable — this is the only status in which they are.
Published	Delivered between its publish start and its publish end. The audience size is stamped at the moment it is published.
Unpublished	Taken down but previously published. It can be published again.
Archived	Retired. Its figures continue to feed the Analytics page.

> **PUBLISHED IS A ONE-WAY DOOR OUT OF DRAFT**
> An announcement that has been published can never return to Draft. If you need to rework the content, duplicate it. This is why the checks below matter: they are the last moment at which a mistake is cheap.

What must be true to publish

- At least one page exists.
- A publish start is set, which the Publish action asks for. A start you set cannot be in the past.
- If a publish end is set, it is on or after the start, and not already in the past.
- If the logic mode is Custom, an expression is written.
- If the targeting mode is Audience, at least one audience is selected. This one is checked when the targeting is saved, so an announcement cannot reach Publish without it.

What freezes, and when

FROZEN ONCE OUT OF DRAFT	ENFORCED BY
Page content	A validation rule on the page
Targeting rules	A validation rule on the rule record
Rule logic mode	A validation rule on the announcement
Targeting mode and chosen audiences	InfoIQ refuses any targeting save outside Draft
The audiences themselves	The audience lock, section 7

The publication window itself is not frozen: extending an end date on a live announcement is a normal operation, and the home page suggests it when one is about to close.

Archiving and deleting

Archive stops delivery and takes the announcement out of every list of what is running. Its figures stay, on its Metrics tab and on the Analytics page. **Delete** is offered on the record page whenever the announcement is not Published, so unpublish or archive a live one first. The dialog can also delete the files that this announcement alone was using. A deletion cannot be undone, and section 14 lists what it keeps.

9 Questions

A reader can ask the author a question from inside the announcement, unless the author turned *Allow questions* off. It is private until the author decides otherwise.

The flow

1. A reader types a question in the announcement and sends it. Status: **New**.
2. It appears in the author's queue — on the InfoIQ home page and on the announcement's own record.
3. The author writes a response. Status becomes **Answered**, and the reader receives a Salesforce notification pointing at their own question. Their questions and the answers stay in the *My Questions* tab.
4. Optionally, the author marks the answer **visible on the announcement**, and every targeted reader sees the exchange inside the announcement itself.

Rules the object enforces

- A question cannot be marked Answered without a response.
- A question cannot be made visible on the announcement before it has a response.
- An answered question cannot be skipped — skipping hides a question from every view, and doing that to an answered one would withdraw an answer already given.

> **SKIP IS NOT DELETE**
>
> Skipping removes a question from the author's queue without answering it. The reader is not notified. Use it for a question already answered elsewhere, not as a way of refusing one.

PART THREE

Read the numbers

Three screens, at three scales: what needs attention today, how one announcement performed, and what everything you have ever sent says about how your organisation reads.

10 The home page

The working view: what is live, what is waiting on you, what needs a decision.

Reach of active announcements

Every live announcement with its coverage (the share of its audience who have closed it, whether they finished it or stopped partway) and how many people were targeted, shown and read. This is the figure that answers "is it landing".

Unanswered questions

The queue from section 9, oldest first, with *Answer* and *Skip* on each row.

Might need an action from you

InfoIQ raises a suggestion when one of four conditions holds. Its button carries the move out in one click. *Not this one* dismisses it, and it is not raised again for that announcement until the announcement is published again.

SUGGESTION	RAISED WHEN
Archive it	Coverage has reached **80%** or more — the announcement has done its job.
Extend it	The window closes within **3 days** and coverage is still under 80%. The button pushes the end back by **7 days**.
Raise its priority	Coverage is under **50%** after at least **7 days** live, and the priority is below Urgent. The button raises it one level, and the suggestion then stays quiet for **2 days** to let the new priority work.
Resume it	An unpublished announcement still has an open window and at least one page.

11 One announcement: the Metrics tab

Open any announcement and switch to Metrics.

Delivery funnel

From the people it was aimed at, to the ones who read it through:

STEP	COUNTS
Targeted	The audience size measured when it was published
Impressions rendered	People the card was actually shown to
Opened	People who opened it
Read through	People who reached the last page

The drop between *Opened* and *Read through* is usually the most informative number on the screen: it tells you whether the announcement was the right length.

Coverage over time

The share of the targeted population that has opened it, day by day since it went live. A curve that flattens early has found everyone it is going to find.

Page by page

How many readers reached each page, and where they left. A cliff between two pages points at that specific page, not at the announcement as a whole.

Until an announcement has been shown **50** times, the tab carries a warning that its shares still move a lot. The figures are shown all the same. On one announcement, a small number is still information.

12 Every announcement: the Analytics page

Patterns across the whole corpus — including announcements that have since been deleted.

Before an announcement is deleted, InfoIQ writes a snapshot of its figures. The snapshot carries counts and distributions only, never a reader. The Analytics page reads live announcements and snapshots through the same shape, so deleting an announcement removes its contents without removing what it taught you.

MEASURE	ANSWERS
The hook	Of a hundred readings served, how many were opened and how many concluded
The half-life	How fast an announcement reaches its audience in the days after going live, over a **30-day** horizon. Finished runs only.
Length	How many readers reach the last page, by page count — the cost of a long announcement
The page-by-page journey	How many are still there on each page, across every announcement that has that page
Where readings stop	How far readers get, in tenths, so announcements of any length sit on one axis
What video changes	Whether announcements carrying a video are read further than those that do not
Targeting width	Whether narrow announcements are read more attentively than broad ones

> **TOO LITTLE DATA, NO FIGURE**
>
> Here a measure stays silent and says *not enough* rather than showing a figure. The hook, the half-life and where readings stop need **50 readings**. Every band or point built from announcements (length, video, the journey, targeting width) needs **5 announcements**, and draws its middle half only from **10**. A rate over four announcements is noise, and nobody should build a policy on it.

The page covers the last 12 months, the last 24 months or the current fiscal year, and *Refresh* recomputes it.

13 The two denominators

The home page and the Metrics tab can show different percentages for the same announcement. This is by design, and it is worth understanding before somebody reports it as a bug.

SCREEN	DIVIDES BY
Home page	A **live estimate**. The targeting is re-resolved against the org as it is right now.
Metrics tab	The audience size **frozen at publication** and stored on the announcement.

Both are correct and they answer different questions. The frozen figure is what the announcement was aimed at, and it is the honest denominator for judging the campaign — it does not move under you when somebody joins or leaves a team. The live estimate answers "if I published this today, who would get it".

They diverge when the population behind the targeting changes after publication: people join a profile, leave a group, are deactivated. A large divergence is a signal, not an error — it means the audience you aimed at is no longer the audience that exists.

> **IF YOU EVER SET THE STORED SIZE BY HAND**
> Read the live estimate and write that, rather than typing a number. A stored figure the live targeting cannot reach produces coverage above 100% on one screen while the other looks normal.

PART FOUR

Operate and reference

What runs in the background, what consumes storage, and the values in one place.

14 Diagnostics and data retention

How errors are recorded

When InfoIQ catches an error it writes twice: a payload to the debug log, and a platform event that a trigger turns into an `Announcement_Log__c` row. The event is published immediately rather than after commit, because almost every error is caught inside a transaction that is about to roll back — a row inserted there would roll back with it, losing precisely the entries worth keeping.

Logging never throws. A logger that failed would turn a handled error into an unhandled one.

Retention

PURGE	RUNS
Entries of a deleted announcement	Automatically, as part of the delete
Anything older than 30 days	Only if you schedule it — section 5

Log rows sit in *your* data storage. That is why nothing in them records what an announcement said or who read it, and why a logger without a purge would be a leak in somebody else's org.

What deleting an announcement removes

Deleting an announcement cascades to its pages, rules, questions and reading states. Its figures survive as a snapshot — section 12 — but its contents do not. If the snapshot cannot be written, the deletion is aborted rather than losing the history quietly.

15 Files and storage

Images, videos and imported decks are Salesforce files. There is no referential integrity between a page and its file – the platform does not allow a lookup to a file – so InfoIQ tracks the link itself and collects what is no longer referenced. It collects at two moments. A save in the builder, or a deck import, removes the page files that no page uses any more. Deleting an announcement removes the files it alone was using, if you tick that option in the Delete dialog.

> **FILE STORAGE OVER QUOTA REFUSES EVERY DML IN THE ORG**
>
> Not just InfoIQ's: every save, everywhere, fails with an error that rarely names storage as the cause. Decks are the usual culprit – a deck uploaded to an announcement and then abandoned keeps its space until it is collected. Watch file storage the same way you watch data storage.

A file is flagged as page media the moment it is uploaded, not when it is used, because the platform writes the file as soon as the author picks it – before they have said what it is for. Anything not flagged is ignored by the collector, which is what keeps it from touching files that have nothing to do with InfoIQ.

16 Reference

Picklist values

FIELD	VALUES
Status	Draft, Published, Unpublished, Archived
Priority	Low, Medium, High, Urgent, Critical
Announcement type	Bug / Incident, New feature, Scheduled maintenance, Training / Tutorial, Strategic information, Other
Targeting mode	Criteria, Audience
Logic mode	Any, All, Custom
Page type	Text, Image, Video
Criterion	Profile, User, Role, Group, Queue, Application, Page type, Custom identifier
Operator	In, Not in
Question status	New, Answered
Reading state	Displayed, Completed, Dismissed

Every validation rule

The bypass permission (section 5) lifts all of them except the two that keep dates in order: an end before its start, and a last publish date before the first.

OBJECT	REFUSES
Announcement	Going back to Draft once published
Announcement	Publishing without a page
Announcement	Publishing without a publish start
Announcement	Setting a publish start in the past
Announcement	Publishing with a publish end already past
Announcement	A publish end before its start
Announcement	A last publish date before the first, or without one
Announcement	Custom logic with no expression
Announcement	Changing the logic mode outside Draft
Announcement	Unpublishing something never published
Page	Changing content outside Draft
Rule	Changing targeting outside Draft
Question	Answered without a response
Question	Visible on the announcement without a response
Question	Skipping an answered question

Thresholds and limits

VALUE	SETTING
Archive suggested at	80% coverage
Low reach suggested below	50% coverage, after 7 days live
Quiet after raising priority	2 days
Expiry horizon	3 days
Extension applied	7 days
Metrics tab warning below	50 readings
Analytics measure silent below	50 readings, or 5 announcements per band
Middle half drawn from	10 announcements
Half-life horizon	30 days
Log retention	30 days

Objects

OBJECT	HOLDS
Announcement	The announcement itself
Announcement Page	One page of content
Announcement Rule	One targeting criterion on an announcement
Announcement Audience	A named reusable audience
Announcement Audience Rule	One criterion inside an audience
Announcement Audience Link	Ties an audience to an announcement
Announcement User State	One reader's reading of one announcement
Announcement Page User State	One reader's reading of one page
Announcement Question	A question and its answer
Announcement Analytics Snapshot	The figures of a deleted announcement
Announcement Recommendation Decision	A suggestion dismissed or acted on
Announcement Log	A diagnostic entry