

Appian 25.1 Product Announcement Webinar

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appian | World



April 27-30, 2025
Denver, Colorado

 appianworld.com

Monthly Newsletter: Next-Gen Enterprise

Each month, get a curated selection of the latest enterprise technology trends, automation best practices, and expert insights to improve your processes.

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Next-Gen Enterprise

The latest updates and news for delivering IT solutions
for the future enterprise

Appian 24.2 Is Live

Check out what's new in the Appian 24.2 release. Explore Process HQ for streamlined workflow optimization plus 11 cutting-edge AI skills for enhanced automation and data management.

[Watch the Replay](#)



Case Management



Simplify Casework Apps with Case Management Studio

Appian Case Management Studio lets you build fast, flexible apps for managing complex casework. View

2025

Quarterly Updates {year}.{release that year}

25.1

25.2

25.3

25.4

JANUARY						
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25.1 Release
February 28, 2025

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Low-Code Design

James Lee | Director, Product Evangelism

AI Copilot for Developers

New regions for sample data generation

Region	NEW Availability
Asia Pacific (Mumbai) ap-south-1	Sample Data Generation
Canada (Central) ca-central-1	Sample Data Generation
Europe (Ireland) eu-west-1	Sample Data Generation
Europe (London) eu-west-2	Sample Data Generation
Europe (Paris) eu-west-3	Sample Data Generation
South America (Sao Paulo) sa-east-1	Sample Data Generation

Case Management Studio

Torri Marquis | Product Manager II

Use date and time for case and task due dates

The screenshot displays the Anidian workspace interface, divided into three main sections:

- Left Panel (Task List):** A list of tasks with their status and completion options. The "Medium \$\$ Intake" task is highlighted in blue and marked as "Completed".
- Middle Panel (Task Configuration):** A form for configuring a task. The "Name" field is "Medium \$\$ Intake". The "Description" field is empty. The "Milestone" is "Intake Review". The "Assigned Group" is "Select group(s)" and the "Assignee" is "Select user(s)". The "Status" is "Completed". The "SLA" section is highlighted with a red box and includes:
 - Days: 3
 - Hours: (empty)
 - Minutes: (empty)
 - Calculate the due date using business days
- Right Panel (Workflow Diagram):** A flowchart showing the process flow. It starts with "START", followed by "Email customer a status update", "Route Disputes", and a decision diamond for "Intake Review" based on dollar amount (Low, Medium, High). The "Medium \$\$ Intake" path leads to "Dispute Validity", which then branches into "Dispute Rejected" or "Request More Information". The "Request More Information" path leads to "Raise Chargeback", then "Merchant Dispute Challenge", and finally "Result of Merchant Dispute". The "Result of Merchant Dispute" path leads to "Reimburse Customer" or "Send Email to Customer - Lost". The "Dispute Rejected" path leads to "Send Email to Customer - Win". The process ends at "END".

Track all instances of task completion

The screenshot displays the Appian user interface for a task titled "Attach Screening Results". The top navigation bar includes "appian", "WORKSPACE", "CASES", "ENTITIES", and "REPORTING". The current workspace is "Workspace" with user "DA".

The task details are as follows:

- Document Upload Task:** Conduct the screening and attach the report.
- Status:** Completed (with a green checkmark icon).
- Type:** Document Upload
- Due:** Feb 8, 2025 7:46 PM
- Created By:** Process Automation • Feb 6, 2025
- Assignee:** James Baker
- Assigned Group:** CMGT Human Resources
- Last updated:** Feb 6, 2025 by James Baker

The task is marked as "Completed" and includes a document attachment: "Revised Screening Results.pdf" (15.29 KB), uploaded on Feb 6, 2025 by James Baker.

Comments: A comment by James Baker (Feb 6, 2025 7:47 PM) states: "Attached the new screening results. Some of the data was missing, so we conducted the screening again to get the necessary information." There is a "Reply" button below the comment.

Case Details: KYC-C60D6BE, "New partner to onboard". A progress bar shows "4/9 tasks resolved". The due date is "Due Feb 26, 2025 4:31 PM".

Previous Occurrences: A red box highlights a previous instance of the task: "Attach Screening Results" completed on Feb 6, 2025 7:44 PM.

Smarter task resolution logic

The screenshot displays the Appian interface for a case titled "CCD-414761E Incorrect Charge at Clothing Vendor". The interface includes a navigation bar with "appian", "WORKSPACE", "CASES", "ENTITIES", and "REPORTING". The case title is prominently displayed, and tabs for "Summary", "Workflow", "Documents", "History", "Emails", and "External Messages" are visible. Three progress indicators are shown: "Intake Review" (6/6 tasks resolved), "Issuer Decision" (0/5 tasks resolved), and "Issuer Processing" (0/2 tasks resolved). A search bar and filters for "ASSIGNEE" and "ASSIGNED GROUP" are present. A table lists various tasks with their status, assignee, and due date.

Name	Status	Assignee	Due
Request More Information Decision	Ready	Unassigned Unassigned	Feb 11, 2025 5:08 PM
Raise Chargeback Confirmation	Queued	Unassigned Unassigned	—
Merchant Dispute Challenge Decision	Queued	Unassigned Unassigned	—
Reimburse Customer Confirmation	Queued	Unassigned Unassigned	—
Send Email to Customer - Won Send Email	Queued	Unassigned Unassigned	—
Result of Merchant Dispute Decision	Queued	Unassigned Unassigned	—
Send Email to Customer - Lost Send Email	Queued	Unassigned Unassigned	—
Email customer a status update Send Email	Completed	Unassigned CMGT Human Resources	Feb 7, 2025 4:21 PM
Medium \$\$ Intake	Queued	Unassigned	—

On the right, a logic diagram illustrates the workflow. It starts with three "Intake Review" tasks leading to a "Dispute Validity" task (Completed). From "Dispute Validity", a "Yes" path leads to a "Request More Information" task (Ready), which then leads to a "Raise Chargeback" task (Queued), and finally to a "Merchant Dispute Challenge" task (Queued). A "No" path leads to a "Dispute Rejected" task (Not Needed), which also leads to a "Merchant Dispute Challenge" task (Queued).

Kick off new cases within your in-flight workflow

The screenshot displays the Appian user interface for a workspace named 'MECP-CBEADA8 January Month End Closing'. The main navigation bar includes 'appian', 'WORKSPACE', 'CASES', 'ENTITIES', and 'REPORTING'. The current view is 'Summary', with other tabs for 'Workflow', 'Documents', 'History', 'Emails', and 'External Messages'. A sidebar on the left shows 'Tasks' with 'Active' cases and 'Comments' for the current case. The main content area shows 'Information' with a description of the month-end closing case and '5 related cases identified'. A modal window titled 'Complete Track Ledger Transactions Process' is open, allowing the user to create a new case. The modal includes a 'Details' tab, a 'Confirmation' section, a 'Case Type' dropdown set to 'Financial Reporting - Ledger Transactions', a 'Title' text field, a 'Description' rich text editor, and a 'Created By' field with 'James Baker' selected. The modal has 'CANCEL' and 'NEXT' buttons at the bottom.

Incorporate emails into your case workflow

The screenshot displays the Adianto Studio interface for configuring a case workflow. The interface is divided into three main sections: a task list on the left, a configuration panel in the center, and a workflow diagram on the right.

Task List (Left Panel):

- Start:** Goes to 1 activity.
- Email customer a status update:** Intake Review, Goes to 1 activity. (Highlighted in blue)
- Route Disputes:** Goes to 3 activities.
- Low \$ Intake:** Intake Review, Goes to 1 activity.
- Medium \$\$ Intake:** Intake Review, Goes to 1 activity.
- High \$\$\$ Intake:** Intake Review, Goes to 1 activity.
- Dispute Validity:** Intake Review, Goes to 2 activities.
- Dispute Rejected:** Intake Review, Goes to 0 activities.
- Request More Information:** Issuer Processing, Goes to 1 activity.
- Raise Chargeback:** Issuer Processing, Goes to 1 activity.
- Merchant Dispute Challenge:** Issuer Decision, Goes to 2 activities.

Configuration Panel (Center):

Basic | Advanced

Details

Name *
Email customer a status update

Email Template *
Notification to Customer [PREVIEW]

CREATE TEMPLATE

Recipients ?*

Case Roles
Customer Email

Groups
Select groups for recipients

Users
Select users for recipients

ADD EMAIL ADDRESSES

Description

Send an email using the template letting them know we received their dispute and are looking into it.

Milestone
Intake Review

Workflow Diagram (Right Panel):

The diagram shows a flow starting with 'START' leading to 'Email customer a status update (Send Email)'. This is followed by a 'Route Dispute' step, which branches into 'Low \$ Intake Confirmation', 'Medium \$\$ Intake Confirmation', and 'High \$\$\$ Intake Confirmation'. These lead to a 'Dispute Validity Decision' step. From there, the flow branches into 'Dispute Rejected Confirmation' and 'Request More Information Decision'. 'Request More Information Decision' leads to 'Raise Chargeback Confirmation', which then leads to 'Merchant Dispute Challenge Decision'. 'Merchant Dispute Challenge Decision' branches into 'Result of Merchant Dispute Decision' (Yes/No) and 'Send Email to Customer - Lost Send Email'. 'Result of Merchant Dispute Decision' leads to 'Reimburse Customer Confirmation' (No) and 'Send Email to Customer - Win Send Email' (Yes). Both 'Reimburse Customer Confirmation' and 'Send Email to Customer - Win Send Email' lead to the final 'END' step.

Assign cases with case type automations

Streamline case assignment with automation rules that dynamically assign cases based on triggers, conditions, and hierarchy levels.

The screenshot displays the Appian Studio interface for configuring automation rules. The top navigation bar includes the Appian logo, 'CASE TYPES' (selected), 'TASKING', and 'EMAIL TEMPLATES'. The user profile 'Studio' with initials 'DA' is visible in the top right. A left sidebar shows navigation options: 'Home', 'Data', and 'Rules' (highlighted). The main content area is titled 'All Case Types' and 'Rules'. It features a '+ CREATE RULE' button and an informational note: 'Rules are listed in the order of evaluation/execution.' Below this, a large box contains the text 'Create custom rules to automate actions on your cases' and another 'CREATE RULE' button, with a note that 'Rules at this level will apply to all cases'. To the right, three example rule triggers are listed: 'When case is created, assign case to someone', 'When task is updated, if task status is equal to Ready, assign task to a group', and 'When case is updated, if case priority is equal to Critical, send email to someone'.

Automate task assignments with workflow rules

The screenshot displays the Appian Studio interface for configuring a workflow rule. On the left, a task list includes 'Start', 'Manager approval needed?', 'Manager approval', 'Provide additional information', 'Is laptop available?', 'Order item', 'Added to inventory' (highlighted), 'Delivery method', 'Ship item', and 'Confirm receipt'. The central panel shows the 'Advanced' tab for rule configuration:

- Advanced Rules:** 1. When **Task Status** is changed, if **Item Type** is Premium, add **Bryan Graney** as an assignee.
- Trigger:** Case field is updated (Priority)
- Conditions:** Priority Equal to Critical
- Action:** Reassign task
- Assignee Type:** Case Field
- Case Field:** Supervisor

Buttons for 'CANCEL' and 'SAVE' are visible at the bottom of the configuration panel. On the right, a flowchart visualizes the process flow from 'START' through various decision and task steps to 'END'. The 'Manager approval' step is linked to the 'Provide additional information' task.

Total Experience

Sahithi Mankala | Product Manager II

Simplified portal publishing

We've updated the portal design experience to no longer prevent your portal from publishing due to potential errors, allowing you to more easily catch and fix issues.

The screenshot displays the Appian portal publishing interface. At the top, the breadcrumb 'OF Orders' is visible. A notification bar at the top left indicates 'Published with errors. Last published 1/28/2025 3:14 AM by Appian Administrator.' Below this, a red-bordered error message states: 'The published portal is in an error state. Check for missing interface precedents and try publishing again.' A 'REPUBLISH' button is located in the top right of the notification area. The interface is split into two main sections: 'Configurations' on the left and 'Branding Preview' on the right. The 'Configurations' section includes a 'Published' toggle, a 'Display Name' field (NexGen Technologies), and a 'Web Address' field. The 'Pages' section lists 'Home' (OF_Portal_LandingPage) and 'Track Order' (OF_Portal_TrackAnOrder). The 'Branding Preview' shows a live view of the portal with the Appian logo, navigation menu (HOME, TRACK ORDER, PRODUCTS, RESOURCES, CONFERENCES), and a main banner for 'NexGen Technologies' with the tagline 'Create, track, and manage your orders through our secure portal.' Below the banner, the text 'How can we help you today?' is visible.

Match your branding more closely with new options

We're bringing you new branding options that allow you to customize the look and feel of your sites and portals.

You can now specify the capitalization for all button labels and configure the shape of dialogs and tooltips.

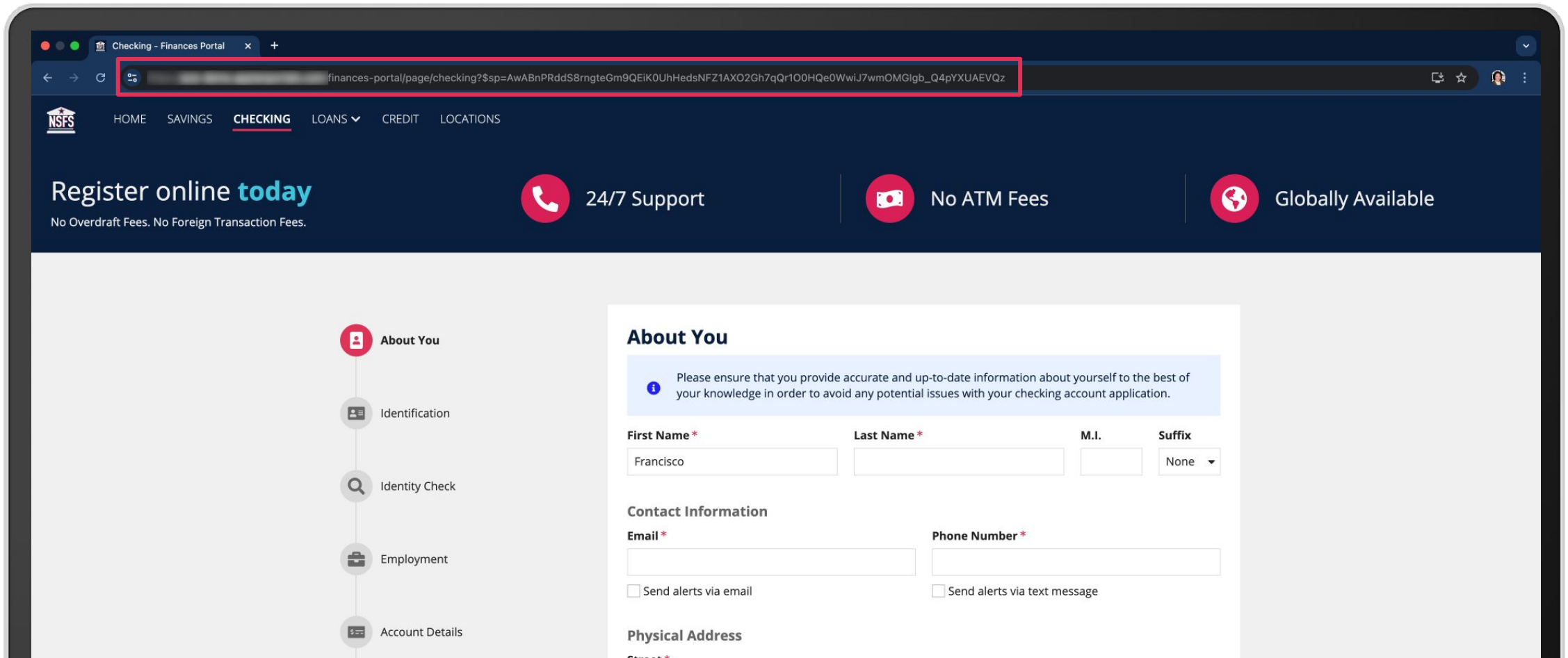
The screenshot displays the 'Branding' configuration panel for the 'NZC Service Request' portal. The panel is divided into two main sections: 'Branding' (left) and 'Branding Preview' (right). The 'Branding' section is highlighted with a red border and contains the following options:

- Input Shape**: Squared, Semi-rounded
- Dialog Shape**: Squared, Semi-rounded, Rounded
- Button Shape**: Squared, Semi-rounded, Rounded
- Use uppercase capitalization for button labels**:

Below these options, the 'Accent Color' is set to Hex code #127d21, the 'Loading Bar Color' is also set to Hex code #127d21, and the 'Favicon Image' is set to 'Document' (NZC Moller Favicon). The 'Typeface' is set to 'Open Sans (System Default)'. The 'Branding Preview' section shows a green header bar with the text 'Moller' and a green background with a white circle containing a red figure. A notification at the top of the preview states: 'The page title will not display in the header bar for portals that have on...'. A 'Service Access' section at the bottom contains a notification: 'Review record type permissions. Verify the selected service account can access only the record types used in the portal. View record type...'

Shorter encrypted URL parameters

We've shortened the length of encrypted URL parameters created using *a!urlForPortal* and *a!urlForSite*, making it easier for users to share tailored links to specific information without reducing security.



Enable users to reorder grid rows using drag and drop

annian

Update Survey

Title *
Summit Satisfaction Survey

Owner's Email *
francisco.rodriguez@valo.com

Associated Event
Future Forward Summit

Go-Live Date *
02/20/2025

Closing Date
08/31/2025

Questions

Example entry: What was your favorite presentation? | Multiple Choice

Question	Question Type
Age	Multiple Choice (Single)
Name	Short Response
Is this your first time attending one of our events?	Yes/No
How satisfied are you with the event overall?	Multiple Choice (Single)
Did you experience any issues during the event?	Yes/No
If you answered "Yes" to the previous question, please describe	Long Response
What did you like most about the event?	Long Response
How likely are you to attend another event hosted by us?	Multiple Choice (Single)
Any additional comments or suggestions?	Long Response

[Add Question](#) 10 items

Question Types

- Short Response**
Up to 250 characters
- Long Response**
Up to 1000 characters
- Multiple Choice (Single)**
List of choices for a user to choose a single answer
- Multiple Choice (Many)**
List of choices for a user to select multiple answers
- Yes / No**

Improved formatting controls for form layout

It's now faster and easier to fine-tune spacing above and below input components like text fields and checkboxes with **new margin parameters**. And, new parameters for form layout allow you to set the **form width, background color, fixed header when scrolling, and show header divider**.

The screenshot displays the Appian Designer interface for editing a form titled "ESG_Conference_FeedbackForm". The interface is divided into several sections:

- Top Bar:** Includes the form name "ESG_Conference_FeedbackForm", tabs for "DESIGN" and "EXPRESSION", and various utility icons like "TEST", "SAVE CHANGES", and "appian".
- Left Palette:** A sidebar with "COMPONENTS", "PATTERNS", and "DESIGN LIBRARY" sections. It lists various form elements such as "CARD", "CARD GROUP", "BILLBOARD", "Inputs" (Text, Paragraph, Integer, Decimal, Date, Date & Time, Styled Text Editor, Encrypted Text, File Upload, Signature, Barcode, Records Chatbot), "Selection" (Dropdown, Multiple Dropdown, Radio Buttons, Checkboxes, Card Choices), and "Display".
- Central Canvas:** Shows the form layout in "EDIT" mode. The form has a header "Conference Experience Feedback" with a thank-you message. Below the header are input fields for "Country" (a dropdown), "Ticket Type" (radio buttons for "VIP", "General", "Student"), "Organization" (a text field), and "Job Title" (a text field). Below these is a section titled "Event Preferences" with a rating scale from "Very Poor" to "Excellent".
- Right Panel:** A configuration panel for the "Form Layout" component. It includes sections for "Rule Inputs", "Local Variables", "Component Configuration", and "Form Layout". The "Form Layout" section is expanded, showing settings for "Background Color" (set to "cons!ESG_BACKGROUND_COLOR"), "Form Width" (set to "Medium"), "Visibility" (set to "Always show"), "Header" (with "Label" set to "Conference Experience Feedback" and "Instructions" text), and "Contents" (with "Show header divider" and "Fix header when scrolling" checked).

Designing interfaces just got faster



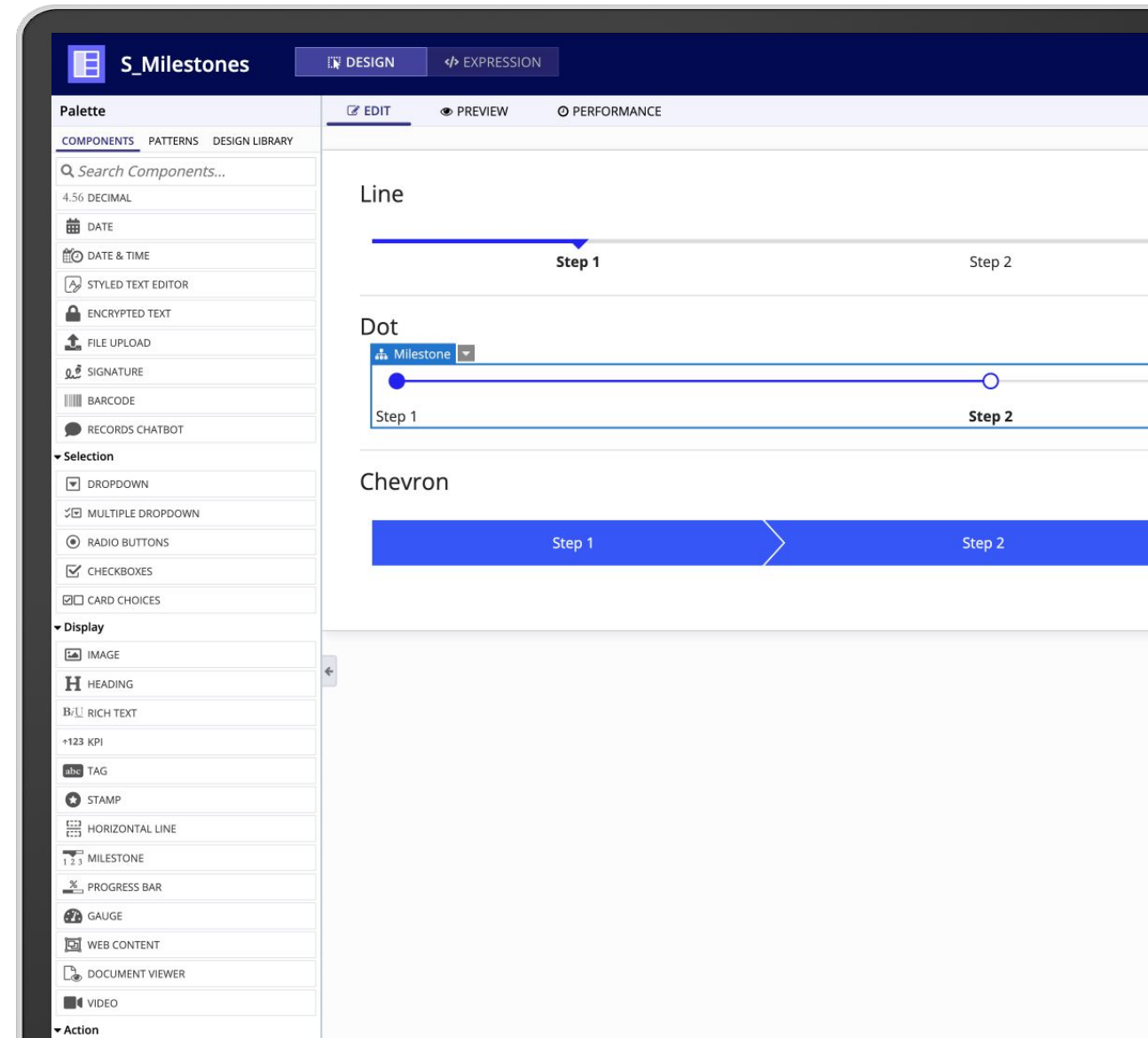
SPEED UP!

Interface objects now load much faster while designing—with performance improvements of up to **400%**.

These performance enhancements scale based on the complexity of the interface, so larger and more intricate designs will see the biggest boost in speed.

New, modern milestone styles

Style your milestones as **lines**, **dots**, or **chevrons** to create modern and intuitive status indicators or wizard steps.



Display multiple fields in record-powered selections

Format and display multiple record fields in the Choice Labels parameter to provide users with more information and help them easily differentiate between options.

The screenshot displays the Appian interface for the 'NZC_PlantDashboard_EnergyTab'. The main content area shows a dashboard for the 'Barbieto Plant' (Ovar, Portugal) for the year 2021. The dashboard includes three charts: 'Electricity Consumption' (KwH), 'Natural Gas Consumption' (Thm), and 'Consumption By Zone'. A dropdown menu is open, showing a list of plants with 'Heller (Düsseldorf, Germany)' selected. The right sidebar shows the configuration for a 'Dropdown' widget, including the 'Data Source' (RECORD TYPE) and 'Choice Labels' configuration.

Electricity Consumption

Month	KwH
Jan	9500
Feb	9500
Mar	9500
Apr	4000
May	3800
Jun	3800
Jul	3800
Aug	3800
Sep	5800
Oct	5800
Nov	5800
Dec	9500

Natural Gas Consumption

Month	Thm
Jan	5800
Feb	5000
Mar	5800
Apr	2000
May	2000
Jun	2800
Jul	2800
Aug	2800
Sep	4000
Oct	3800
Nov	2200
Dec	2200

Consumption By Zone

	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	
SEP	12%	8%	15%	10%	17%	8%	23%
OCT	12%	8%	15%	10%	15%	9%	25%
NOV	12%	8%	13%	10%	17%	8%	23%
DEC	12%	8%	13%	10%	16%	8%	25%

Choice Labels Configuration:

```
fldata[recordType!NZC Plant.fields.plantName] & " (" & fldata[recordType!NZC Plant.fields.country]
```

Cleaner design for single record views

Record views **automatically hide** record view tabs when there is only one view configured.

INSURECORP HOME POLICIES CLAIMS PAYMENT SUPPORT

Claim 123-45-6789

➔ **What's next?** Your insurance adjuster has inspected your vehicle and will soon issue an itemized estimate of repair costs.

Claim Progress

- Loss Occurred**
September 13
- Claim Filed**
September 13
- Vehicle Inspected**
September 15
- Estimate Issued
- Payment Sent
- Claim Closed

Insured Driver

Sharif **GOOD DRIVER DISCOUNT**

Details of Loss

LOCATION
Beverly Hills, CA 90210

Rodeo Dr & Wilshire Blvd
[View larger map](#)

DATE & TIME
Sep 13, 2021 3:00PM

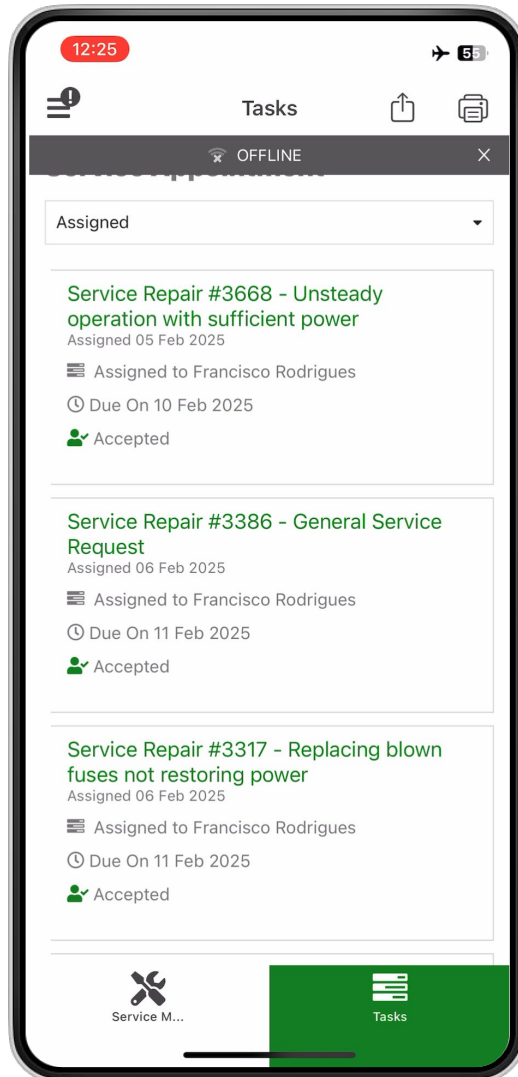
Generate modern record views

The screenshot displays the Appian design studio interface for a record view titled "S_ClaimSummary". The interface is divided into several key areas:

- Header:** A horizontal progress bar with four stages: "Pending" (highlighted in blue), "Approved", "Rejected", and "Under Review".
- Details:** A grid of information cards:
 - Submitted On:** February 5, 2025
 - Policy:** 1
 - Claimant:** John Doe
 - Vehicle:** Toyota
 - Incident:** 123 Main St, Springfield
 - Damage Severity:** Minor
 - Title:** Rear-End Collision at Traffic Light
- Description:** A text block containing a detailed account of the incident: "On May 2, 2024, the claimant was stopped at a red light on Main St when another vehicle traveling at approximately 30 mph failed to brake in time and collided with the rear of their Toyota Camry. The impact caused significant damage to the rear bumper, trunk, and taillights. The other driver admitted fault, and a police report was filed. The claimant is seeking repairs for body damage and potential compensation for minor whiplash injuries."
- Incident:** A grid of information cards:
 - Due Date:** May 1, 2024
 - Location:** 123 Main St, Springfield
 - Has Police Report:** Yes
 - Description:** Rear-ended at a traffic light
- Actions:** Two buttons: "DELETE CLAIM" and "UPDATE CLAIM".
- Contacts:** A card for "Horst Otto" with the role "Assignee".
- Event History:** A list of events, including "Francisco Rodrigues Updated Claim" on Feb 06, 2025 at 11:29 AM.

The right-hand side of the interface features a "Component Configuration" panel for the "Header Content Layout" component. It includes settings for "Header", "Contents", "Background Color" (set to "#fbfbfb"), "Visibility" (set to "Always show"), and "Contents Padding" (set to "Default").

Improved UX for completed offline tasks



Build a seamless offline user experiences with the new **!submittedOfflineTaskIds()** function to remove completed tasks from custom task reports when they are no longer needed.

Expanded support for offline site pages

Offline mobile now supports offline-enabled interfaces that are added **directly as site pages**.

The screenshot displays the Appian configuration interface for the 'NZC Service Repair Hub'. The interface is divided into several sections:

- Configurations:** Includes settings for 'Display Name' (Static, Expression), 'Web Address', 'Show Tempo Link in Navigation Menu', 'Show Record News', and 'Show Task List on Mobile'. The 'NZC Service Technician' role is selected.
- Pages:** A section for organizing site navigation, with options to 'ADD PAGE' and 'ADD PAGE GROUP'. It lists 'Service Management' (NZC_ServiceRequestDashboard) and 'Tasks' (NZC Service Repair Hub Task Report Action).
- Branding Preview:** Shows a preview of the site with the 'Moller' logo, 'SERVICE MANAGEMENT' and 'TASKS' tabs, and a 'Welcome, Francisco SUPERVISOR' message.
- Edit Page Dialog:** A modal window for editing a page. It includes fields for 'Title' (Static, Expression), 'Web Address Identifier', 'Icon', 'Type' (Interface), 'Content' (NZC_ServiceRepairHub_OfflineTaskList), 'Width' (Narrow, Medium, Wide, Full), and 'Visibility' (Always show, Only show when...).

The 'Edit Page' dialog box is highlighted with a red border, and the 'Type' dropdown is set to 'Interface' and the 'Content' field is set to 'NZC_ServiceRepairHub_OfflineTaskList'.

Data Fabric

Daniel Mackenthun | Sr Product Manager

More scalable, performant data fabric architecture



SPEED UP!

In 25.1, we have enhanced our data fabric architecture to support **greater scalability** and **performance** throughout your applications.

Five customers and partners participated in our beta program and saw these results:

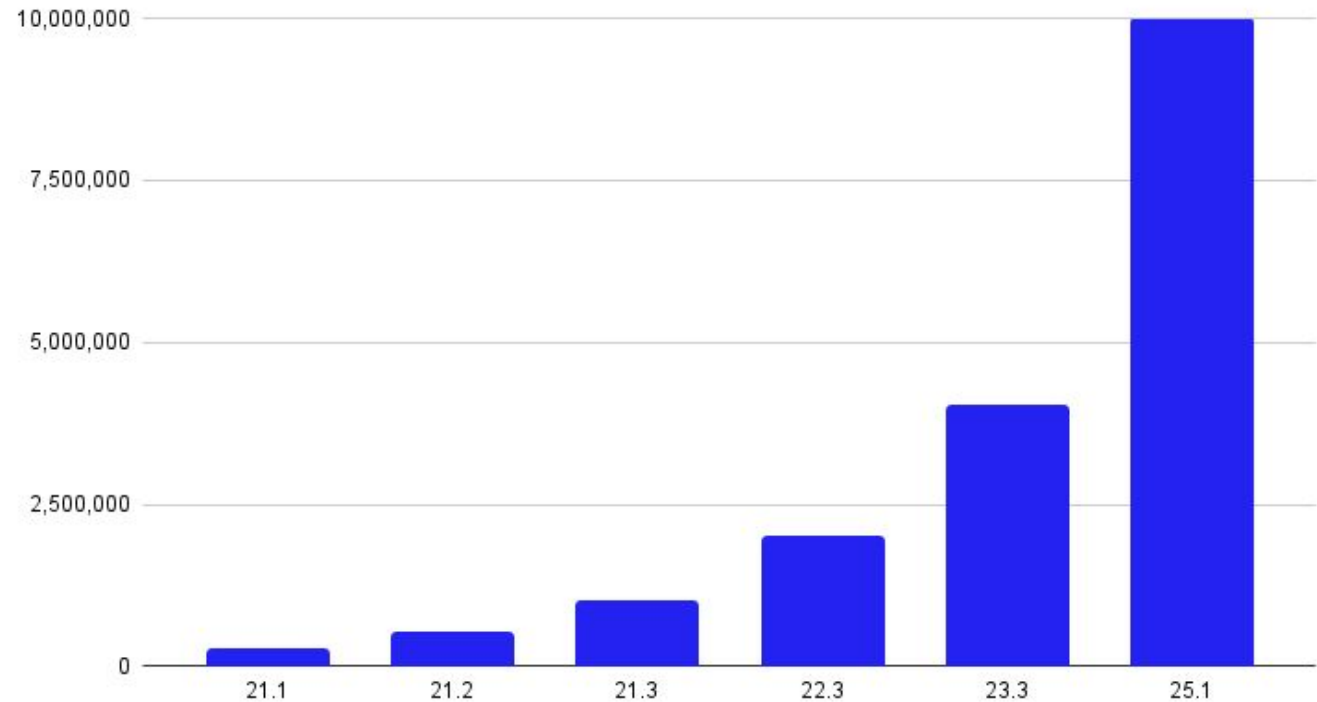
- Complex queries against their largest record types were **5-10x faster**
- Some queries were **40x faster**

Sync 10 million rows per record type

Max number of synced rows per Record has increased from

4 Million to **10 Million**.

Max Synced Rows per Record



Write to multiple record types at once

The screenshot displays the Appian Process Modeler interface for a process named "CCM Triage Inbound Communication (Draft)". The workflow diagram shows a sequence of nodes: Start Node, Call Integration - CCM_SummarizeEm, and Update Communication. The "Update Communication" node is selected, and the "Configure Update Communication" dialog box is open. The dialog has tabs for General, Setup, Data, Forms, Scheduling, Assignment, Escalations, Exceptions, and Other. The "Setup" tab is active, showing the "Write Records" section. The "Records Input" dropdown is set to "communication, task", and the "Record Type for Events" is set to "Inbound Communication". The "Write Events" section shows "Always" selected for "Choose when to write events for the Inbound Communication record type", with "Event Type" set to "Updated Case", "User" set to "Process Initiator", and "Timestamp" set to "Now".

Configure Update Communication

General Setup Data Forms Scheduling Assignment Escalations Exceptions Other

Write Records

Select a process variable or write an expression to use as the Records input for this node

Records Input *

communication, task

communication

emailMessage

task

Record Type for Events

Inbound Communication

configured! Use the section below to write events for this record type.

Write Events

[Learn More about writing events](#)

Choose when to write events for the Inbound Communication record type

Always

Never

Only when...

Event Type *

Updated Case

User

Process Initiator

Timestamp

Now

CANCEL OK

Configure field-level security

Determine which fields in your record type users can view and have greater control over who can see your enterprise data.

The screenshot shows the Appian interface for configuring field-level security. The main window is titled "Edit Field Security: assignedTech". A modal dialog is open, asking "Who can see this field?". The "Only users..." option is selected. Under "Found in groups", the "NZC Service Supervisors" group is listed. The background shows a table of fields and their security settings.

Field	Security
requestTypeid	Users who can see the record type
assignedTech	Users who can see the record type
folderid	Users who can see the record type
requestorFirstName	NZC Service Supervisors, NZC Service Technician
requestorLastName	NZC Service Supervisors, NZC Service Technician
requestorEmail	NZC Service Supervisors

Configure unique fields in your service-backed record

Configure Data Source

Connected System OF SAP ERP

Record Data Source OF_GetSKU_recordDataSource

1. Select primary key field and unique fields

Primary Key Field * id

Unique Fields

- productId
- sku
- unitCost
- details

2. Select record fields

Source Field Name	Record Field	Record Field Type	Display Name	Description
<input checked="" type="checkbox"/> id	id	Number (Integer)	Id	0/500
<input checked="" type="checkbox"/> productId	productId	Number (Integer)	Product Id	0/500
<input checked="" type="checkbox"/> sku	sku	Text	Sku	0/500
<input checked="" type="checkbox"/> unitCost	unitCost	Number (Decimal)	Unit Cost	0/500
<input checked="" type="checkbox"/> details	details	Text	Details	0/500

Sync data using URLs, URIs, cursors, or tokens

SKS Claim SAVE CHANGES annian

Configure Data Source

Choose Record Data Source

Record Data Source *

Select a rule + Create Record Data Source

Preview

Create Record Data Source

SELECT INTEGRATION > **CREATE EXPRESSION RULE** > **SYNCING IN BATCHES**

**Batch by Sequential Values**
Creates a rule input of type Number (Integer)

A **Batch by Text, URL, or URI**
Creates a rule input of type Text and uses a!pageResponse

⊘ **No Batching**
All rows retrieved in a single batch

BACK CANCEL CREATE

ⓘ The Record Data Source can return up to 1000 rows per call. To sync more than 1000 rows, you must choose a batching method. [Learn More](#)

Remap record fields to different source fields

With just a click, align your existing record fields with those in your new or modified data source to resolve any schema mismatches.

Customer SAVE CHANGES **annian**

Configure Data Source

CCM_CUSTOMER: UPDATE FIELD MAPPINGS

[REMOVE ALL UNMAPPED FIELDS](#)

Some source fields have changed or been removed. Please map their associated record fields back to a source field, or remove them if no longer needed.

Record Field Name	Record Field Type	Source Field	
districtId	Number (Integer)	shippingId - INTEGER	
addressId	Number (Integer)	billingId - INTEGER	
phone	Text	mobile - VARCHAR(255)	
customerSince	Date and Time → Date	join_date - DATE	
isActive	Boolean	inactiveflag - BIT	

Store unstructured data in record fields

Store field values up to **64,000** characters with the new Extra Long Text data type, enabling you to store information with a lot more text like support case descriptions and survey responses.

Create Data Model

Review and edit data model
Review and edit the fields and relationships you've added so far.
[Learn more about relationships](#)

Fields Relationships

+ NEW FIELD + NEW CHOICE LIST

Field Name	Data Type	Actions
id	Number (Integer)	+ ↑ ↓ ×
submittedOn	Date and Time	+ ↑ ↓ ×
submittedBy	User	+ ↑ ↓ ×
review	Extra Long Text	+ ↑ ↓ ×
employeeId	Extra Long Text	+ ↑ ↓ ×

Relationship Diagram

No relationships available
Add record type relationships to easily reference data from other record types

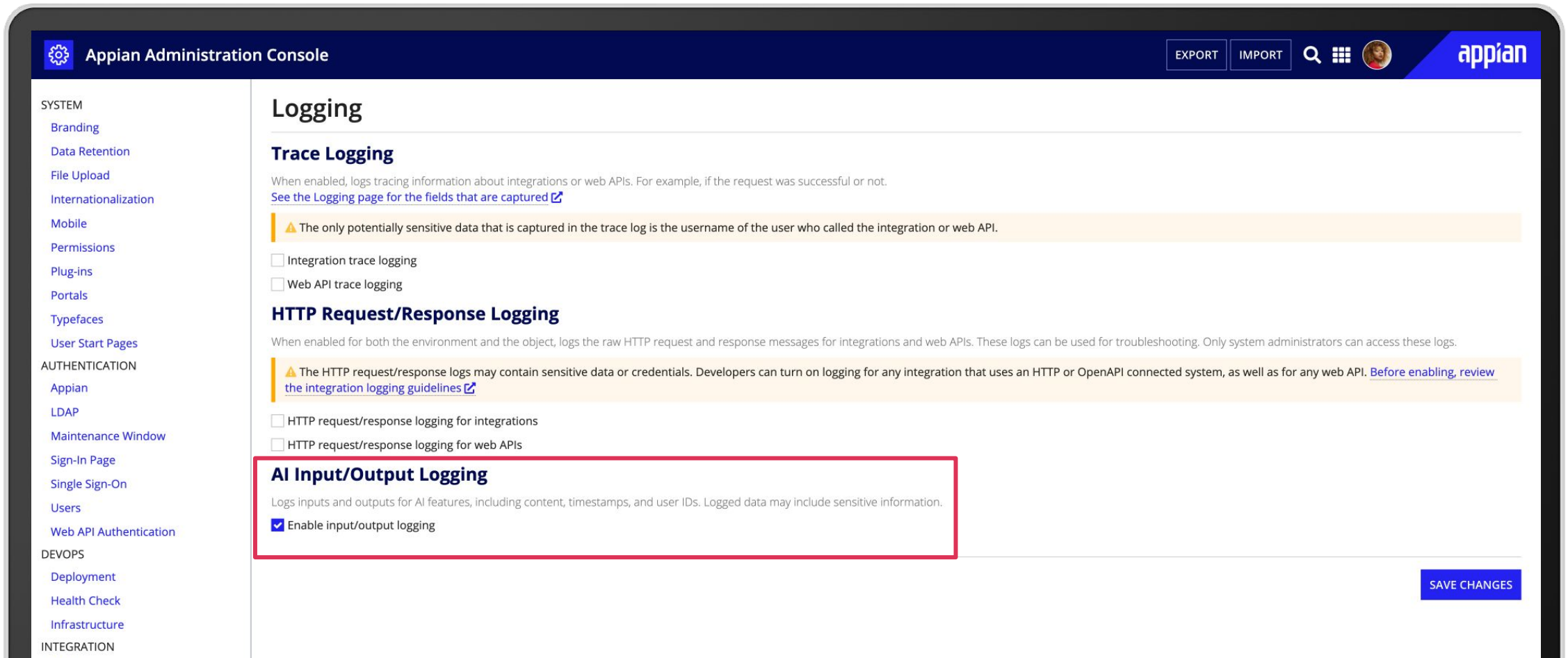
ADD RELATIONSHIP

Automation

Derek Knoderer | Sr Product Manager

New audit log for monitoring all AI usage

This log helps you **monitor** and **audit** AI usage within your Appian environment, ensuring adherence to internal policies, industry standards, and regulatory requirements.



The screenshot displays the Appian Administration Console interface. The top navigation bar includes the Appian logo, 'EXPORT' and 'IMPORT' buttons, a search icon, and a user profile icon. The left sidebar lists various system settings categories: SYSTEM (Branding, Data Retention, File Upload, Internationalization, Mobile, Permissions, Plug-ins, Portals, Typefaces, User Start Pages), AUTHENTICATION (Appian, LDAP, Maintenance Window, Sign-In Page, Single Sign-On, Users, Web API Authentication), DEVOPS (Deployment, Health Check, Infrastructure), and INTEGRATION.

The main content area is titled 'Logging' and contains three sections:

- Trace Logging**: When enabled, logs tracing information about integrations or web APIs. For example, if the request was successful or not. [See the Logging page for the fields that are captured](#). A warning message states: 'The only potentially sensitive data that is captured in the trace log is the username of the user who called the integration or web API.' Two checkboxes are present: 'Integration trace logging' and 'Web API trace logging', both of which are currently unchecked.
- HTTP Request/Response Logging**: When enabled for both the environment and the object, logs the raw HTTP request and response messages for integrations and web APIs. These logs can be used for troubleshooting. Only system administrators can access these logs. A warning message states: 'The HTTP request/response logs may contain sensitive data or credentials. Developers can turn on logging for any integration that uses an HTTP or OpenAPI connected system, as well as for any web API. [Before enabling, review the integration logging guidelines](#).' Two checkboxes are present: 'HTTP request/response logging for integrations' and 'HTTP request/response logging for web APIs', both of which are currently unchecked.
- AI Input/Output Logging**: Logs inputs and outputs for AI features, including content, timestamps, and user IDs. Logged data may include sensitive information. The checkbox 'Enable input/output logging' is checked and highlighted with a red box.

A 'SAVE CHANGES' button is located at the bottom right of the page.

AI Copilot for Business Users

[PREVIEW] Chat with your documents in your app



appian

Life Insurance Applicants

← BACK

Michelle Jones
FEMALE | 35 | NON-SMOKER

✉ michelle.jones@appian.com
(555)-1234
🏠 123 Elm St. Springfield PA

15%
RISK SCORE

Documents

📄 Upload

- 📄 Tax - W2
✔ Ready for Review
- 📄 Medical History
✔ Ready for Review
- 📄 Life Insurance Policy
⌚ Pending

LIFE INSURANCE P... 1 / 2 89%

A 20 year life insurance policy for Michelle Jones

Policy Information Policy Number: LIP-2025-567890 Policy Date: February 12, 2025 Issued Date: February 12, 2025 Expiration Date: February 12, 2045	Insured Information Insured: Michelle Jones Date of Birth: January 15, 1980 Sex: F Address: 123 Elm Street, Springfield, USA
---	---

Policy Overview

This document certifies that Michelle Jones is insured under the terms and conditions outlined in this policy. The policy provides financial protection to the beneficiaries in the event of the policyholder's death during the coverage period.

Type of Policy: Whole Life Insurance
Coverage Amount: \$750,000
Policy Term: Lifetime
Premium Amount: \$150 per month
Payment Frequency: Monthly

Chat with Documents

Who are the beneficiaries for Michelle?

According to the policy information, the primary beneficiaries for Michelle Jones' life insurance policy are:

- Steven Jones (Spouse) - 50%
- David Jones (Son) - 25%
- Emily Jones (Daughter) - 25%

LIFE INSURANCE POLICY DOCUMENT
pdf - 88.62 KB | Page 1 [Hide Supporting Text](#)

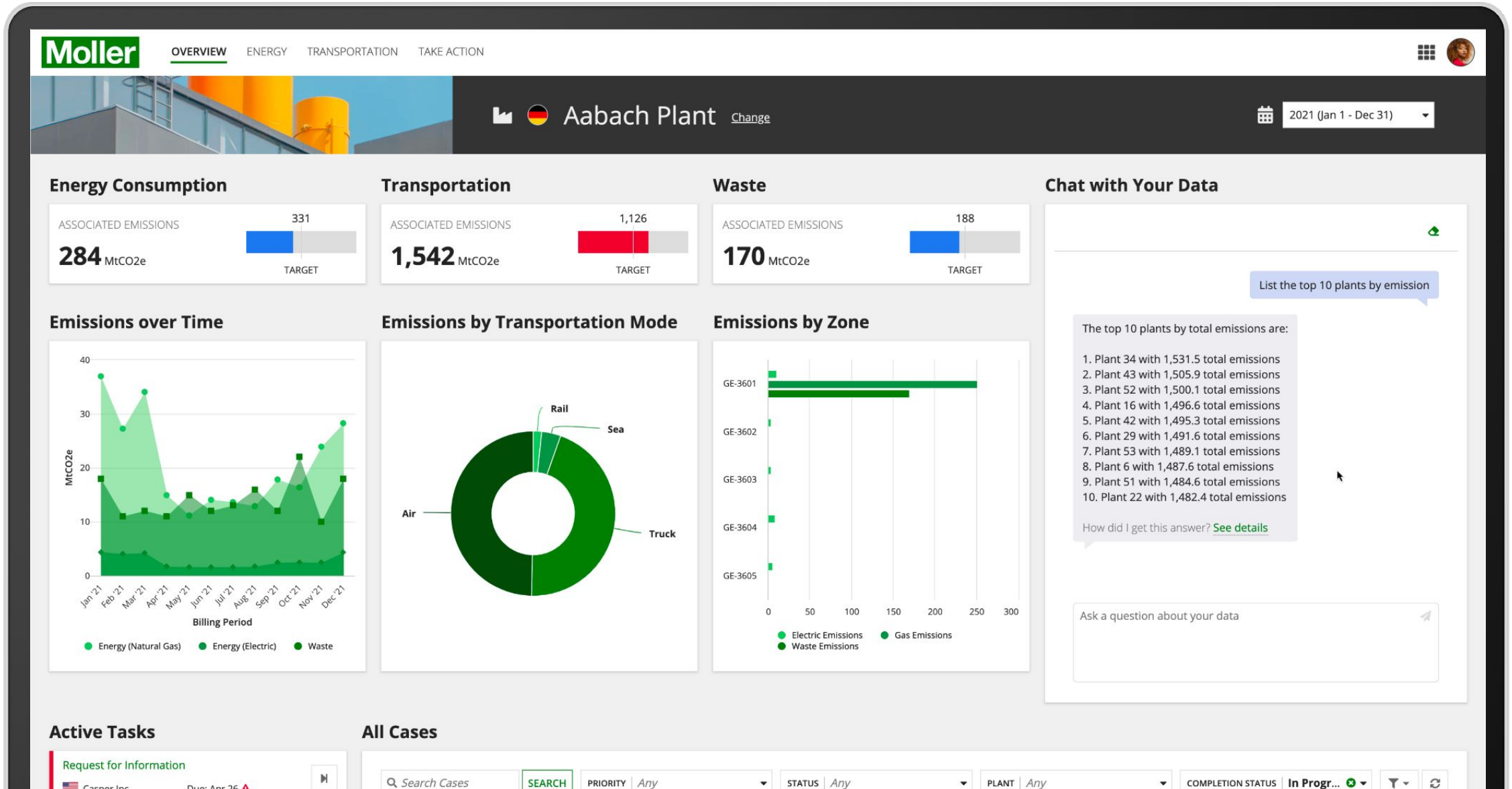
Policy Information Policy Number: LIP-2025-567890 Policy Date: February 12, 2025 Issued Date: February 12, 2025 Expiration Date: February 12, 2045 Insured Information Insured: Michelle Jones Date of Birth: January 15, 1980 Sex: F Address: 123 Elm Street, Springfield, USA **Policy Overview** This document certifies that Michelle Jones is insured under the terms and conditions outlined in this policy. The policy provides financial protection to the beneficiaries in the event of the policyholder's death during the coverage period. **Type of Policy:** Whole Life Insurance Coverage Amount: \$750,000 Policy Term: Lifetime Premium Amount: \$150 per month Payment Frequency: Monthly **Beneficiaries** Primary Beneficiaries: • Steven Jones (Spouse) – 50% • David Jones (Son) – 25% • Emily Jones (Daughter) – 25% In the event of the policyholder's death, the coverage amount will be distributed according to the assigned percentages. If a primary beneficiary is deceased, their share will be reallocated among the remaining beneficiaries unless otherwise specified.

Ask a question about your documents.

0/1000

Review AI-generated content to make sure it is accurate and appropriate. [Learn more about AI Copilot](#)

[PREVIEW] Chat with your data fabric in your app



AI Skills

Process hundreds of millions of pages with AI skills

Your processes can now classify or extract data from **hundreds of millions of pages per year**. If your applications handle massive volumes of documents, you'll benefit from fewer delays and bottlenecks in document processing.

You will also see overall performance and efficiency improvements in processing time, allowing you to process up to **75x more documents per hour**.



Process up to 75x more

documents per hour

Expanded token limits for document processing



SKS_ExtractDataFromDocument

SAVE CHANGES

appian

Create & Test Prompt

Models enforce token limits on prompts, including the input text. Larger prompts may limit the amount of input text the model will accept. There is a maximum of 150,000 characters between the prompt and examples.

Identify Document Type

Select what kind of documents you will be uploading for extraction.

- Text only**
Extract data from text within documents. Supports up to 100 pages.
- Visual elements and text**
Extract data from visual elements, like checkboxes, charts, or images, as well as text within documents. Supports up to 20 pages.

Prompt

Describe what you'd like the model to do when it receives the input.

You are an advanced AI data extraction agent. Given the following large government policy document, extract all key details and structure them in a JSON format.

```
{  
  "policy_title": "string",  
  "issuing_agency": "string",  
  "publication_date": "2025-02-01",  
  "policy_summary": "The Federal Digital Policy Act of 2025 establishes guidelines for the implementation, security, and compliance of digital government services. It outlines procedures for data privacy, cybersecurity, and accessibility for public digital platforms. Agencies must adhere to these regulations to ensure a secure and efficient digital transformation."  
  "sections": [  
    {  
      "section_title": "Digital Infrastructure",  
      "section_number": "1",  
      "content": "1.1 Overview of government digital platforms.\n1.2 Requirements for cloud adoption and security.\n1.3 Guidelines for interoperability between agencies."  
    },  
    {  
      "section_title": "Cybersecurity Measures",  
      "section_number": "2",  
      "content": "2.1 Data encryption standards.\n2.2 User  ]  
}
```

Temperature

Tell the model how similar or varied you'd like the responses to be

10

Test Prompt

Test Input

Federal_Digital_Policy_Act_2025
PDF - 2.76 KB

TEST

Output

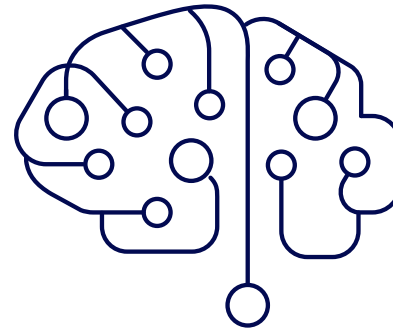
Review AI-generated content to make sure it is accurate and appropriate.
[Learn more about Generative AI](#)

```
{  
  "policy_title": "Federal Digital Policy Act - 2025",  
  "issuing_agency": "Department of Digital Governance",  
  "publication_date": "2025-02-01",  
  "policy_summary": "The Federal Digital Policy Act of 2025 establishes guidelines for the implementation, security, and compliance of digital government services. It outlines procedures for data privacy, cybersecurity, and accessibility for public digital platforms. Agencies must adhere to these regulations to ensure a secure and efficient digital transformation."  
  "sections": [  
    {  
      "section_title": "Digital Infrastructure",  
      "section_number": "1",  
      "content": "1.1 Overview of government digital platforms.\n1.2 Requirements for cloud adoption and security.\n1.3 Guidelines for interoperability between agencies."  
    },  
    {  
      "section_title": "Cybersecurity Measures",  
      "section_number": "2",  
      "content": "2.1 Data encryption standards.\n2.2 User  ]  
}
```


New domains for AI skill services

AI Skill services were updated to support the new **".us"** domain for FedRAMP compliance.

To maintain access to these services, update your network allow list with the new AI Skill endpoints.

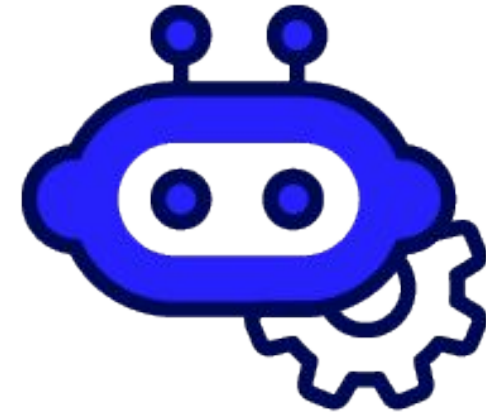


FedRAMP

Robotic Process Automation (RPA)

Stability and logging improvements for RPA

We've made several behind-the-scenes updates to RPA features and logs to keep things running smoothly and transparently.



WEBINAR

Realizing Value from AI Agents in Your Business Processes

March 6 | 11AM EST



Alex Boerescu

Senior Solutions Consultant,
Appian

appian

Register:



Autoscale

Tejas Sakhardande | Sr Product Manager II

Kick off autoscaled processes directly from a portal

We've enhanced our Portal Website Protections to let your portals kick off more autoscaled processes at the same time, **enabling higher-scale usage.**



OUTAGE CENTER

We're sorry that you're having trouble with your Wyndham Power service. **How can we help?**

Tell us about a complete or partial outage of service

 REPORT OUTAGE

Check on or cancel a previous report

 CHECK STATUS

See a list of confirmed outages

 BROWSE REPORTS

Interactive playback of autoscaled processes

Appian Process Modeler

File Modify View

Process Details Step-by-Step Playback

Claim Received 2/11/2025 by Ella Schn... (Monitoring)

Step-by-Step Playback

Get Customer Data

NODE DETAILS VARIABLES CHANGED (1)

Display

Formatted Raw Expression

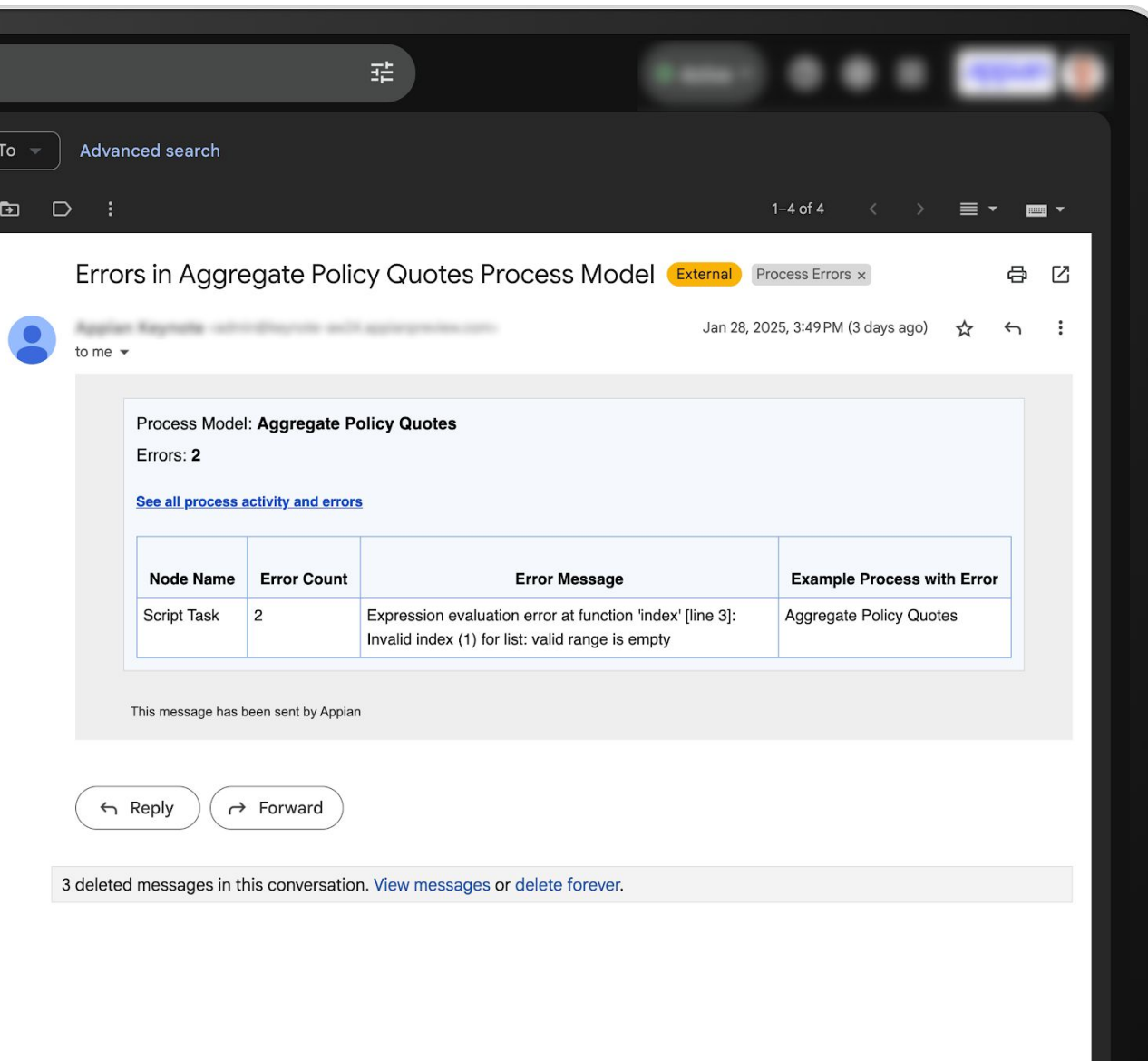
customer

Map

- id "a0U5G00008XidXUAZ" (Text)
- ownerId "005f4000000RfWAAO" (Text)
- isDeleted 0 (Number (Integer))
- name "a0U5G00008XidXC" (Text)
- createdDate "3/25/21 20:44" (Text)
- createdById "005f4000000RfWAAO" (Text)
- lastModifiedDate "3/29/21 12:33" (Text)
- lastModifiedById "005f4000000RfWAAO" (Text)
- systemModstamp "4/14/21 3:12" (Text)
- lastActivityDate "" (Text)
- lastViewedDate "" (Text)
- lastReferencedDate "" (Text)
- industryC "" (Text)
- accountSourceC "" (Text)
- annualRevenueC "" (Text)
- siteC "" (Text)
- faxC "" (Text)
- lastActivityDateC "4/2/21 10:20" (Text)
- photoUrlC "/services/images/photo/001f400001Fa0n" (Text)
- jigsawCompanyIdC "" (Text)
- cleanStatusC "Pending" (Text)
- createdByIdC "005f4000000RfWAAO" (Text)
- isDeletedC 0 (Number (Integer))
- billingStateC "VA" (Text)
- websiteC "" (Text)
- billingCountryC "US" (Text)
- billingPostalCodeC 22033 (Number (Integer))
- dunsNumberC "" (Text)
- descriptionC "Acme Corporation" (Text)
- lastViewedDateC "4/5/21 10:20" (Text)
- numberOfEmployeesC "" (Text)
- lastReferencedDateC "4/5/21 10:20" (Text)
- ownershipC "" (Text)
- shippingStateC "VA" (Text)
- billingStreetC "35511 Evergreen Rd." (Text)
- sicC "" (Text)

← PREVIOUS NODE SKIP 10 NODES NEXT NODE →

Email alerts and log streaming for autoscale processes



The screenshot shows an email interface with the following details:

- Subject:** Errors in Aggregate Policy Quotes Process Model
- Sender:** Appian (Avatar)
- Received:** Jan 28, 2025, 3:49 PM (3 days ago)
- Content:**
 - Process Model: **Aggregate Policy Quotes**
 - Errors: **2**
 - [See all process activity and errors](#)
 - | Node Name | Error Count | Error Message | Example Process with Error |
|-------------|-------------|--|----------------------------|
| Script Task | 2 | Expression evaluation error at function 'index' [line 3]: Invalid index (1) for list: valid range is empty | Aggregate Policy Quotes |
- Footer:** This message has been sent by Appian

For quick, up-to-date information about your autoscaled process errors, we're introducing **email alerts** to help process administrators resolve issues faster.

And for environments with log streaming enabled, **autoscale process logs** are **now available**.

Compliant with multiple security frameworks

Autoscale is now compliant with 3 important frameworks:

- FedRAMP Moderate
- HIPAA
- PCI/DSS

This means autoscale meets the stringent **security, privacy, and operational requirements** for public sector, healthcare, and financial applications



FedRAMP



Process HQ

Michael Herrmann | Sr Product Manager

Refreshed home page

appian

Reports and Dashboards

Explore your data fabric and business processes so you can make strategic, data-driven decisions

-
-
-
-

RECENTLY OPENED

Orders Dashboard
You opened in the past month

Policy Submissions Grid
You opened in the past month

#	Broker Office	Engagement Type	Name	Line of Business	Type	Product	Total Value	Rate Class
1	Alpha Insurance	Lightbulb	Client	Commercial Auto	Renewal	Client Auto	\$100,000.00	\$1,200.00
2	Alpha Insurance	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$100,000.00	\$15,000.00
3	Commercial Management	Training	Commercial Auto	Commercial Auto	Renewal	Commercial Property	\$100,000.00	\$1,000.00
4	Alpha Commercial	Lightbulb	Client	Commercial Property	Renewal	Early Endorsement	\$400,000.00	\$2,000.00
5	Commercial Management	Training	Commercial Auto	Commercial Auto	Renewal	Michael Thompson	\$200,000.00	\$10,000.00
6	Commercial Management	Training	Commercial Auto	Commercial Auto	Renewal	Michael Thompson	\$200,000.00	\$10,000.00
7	Alpha Commercial	Lightbulb	Client	Commercial Auto	New Business	Commercial Property	\$200,000.00	\$10,000.00
8	Alpha Commercial	Lightbulb	Client	Commercial Property	Renewal	Commercial Property	\$200,000.00	\$10,000.00
9	Commercial Management	Lightbulb	Client	Commercial Auto	New Business	Commercial Property	\$200,000.00	\$10,000.00
10	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00
11	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00
12	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00
13	Commercial Management	Training	Commercial Auto	Commercial Auto	Renewal	Michael Thompson	\$200,000.00	\$10,000.00
14	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00
15	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00
16	Alpha Commercial	Lightbulb	Client	Commercial Auto	Renewal	Commercial Property	\$200,000.00	\$10,000.00

Status of Active Submissions
You opened in the past month

Number of Policy Submissions per Broker O...
You opened in the past month

LIBRARY

All
Created by Me
Shared with Me

Search

Type

Last Modified

Last Modified By

Name	Description	Last Modified	
Orders Dashboard		Bryan Jennings 1/28/2025 8:15 PM	
Total Value Average		Bryan Jennings 1/10/2025 7:55 PM	
GW Quote Amount Average		Bryan Jennings 1/10/2025 7:55 PM	
Policy Submissions Report		Bryan Jennings 1/10/2025 7:55 PM	
Average Number of Persons		Bryan Jennings 1/10/2025 7:55 PM	

Easily rename record types

Data Governance > Order Submission

Order Submission

Display Name
Order Submissions

Source
Order Submission (Apptian)

Record Events
Configured

Data Catalog
Shown

Last Full Sync
Feb 4, 2025 3:01 AM

DATA STRUCTURE DATA PREVIEW SECURITY DEPENDENTS

FIELDS

Record Field Name	Type	Display Name	Description
id	Number (Integer)	Id	-
type	Text	Type	-
reconciled	Boolean	Reconciled	Did the order document require manual reconciliation or was it straight-through processed
extractionId	Number (Integer)	Extraction Id	Connects to extracted order document details
statusId	Number (Integer)	Status Id	-
priorityId	Number (Integer)	Priority Id	-
opportunityId	Number (Integer)	Opportunity Id	-
assignedEmployeeId	Number (Integer)	Assigned Employee Id	-
orderDate	Date	Order Date	Date that the order was received
createdBy	Text	Created By	-

« < 1 - 10 of 29 > »

RELATIONSHIPS

Show relationships from related record types

Process HQ fully HITRUST certified

We're happy to announce that process insights joins data fabric insights in meeting **all HITRUST requirements**.

HITRUST[®]

Process Insights

Apply precise filters to your KPIs

You can now define your KPIs with even **more precision**, using a combination of multiple characteristics to examine and track your data.

The screenshot displays the 'Create KPI' interface in Appian. The left sidebar shows three steps: 'Type' (checked), 'Definition' (active), and 'Properties'. The main area is titled 'Definition' and includes a 'Select what you want to count *' section with three options: 'Activities', 'Sequences', and 'Attributes' (selected). Below this is a 'Cases with Attribute' section with 'Priority' selected and 'High' chosen. The 'Filters' section, highlighted with a red box, contains a table with two filters: 'Source' equals 'Direct' and 'Customer Type' equals 'Commercial'. At the bottom, the 'Display as*' section has 'Number' and 'Percentage' checked. On the right, a 'KPI Preview' shows a line chart for 'Count of High Priority Orders' with a value of 253 cases (4.26%) and a 1% increase.

Create KPI

Definition

Select what you want to count *

Activities Sequences **Attributes**

For example, how many cases occur in the U.S.

Cases with Attribute

Priority High

Filters

Filters limit the cases related to the KPI based on the attribute(s) you select.

Attribute	Operator	Attribute Value(s)
Source	Equals	Direct
Customer Type	Equals	Commercial

[Add a filter](#)

Display as*

Number Percentage

KPI Preview

Count of High Priority Orders

253 CASES (4.26%) ↑1%

75

0

Based on current view: All Cases

Keep an eye on KPIs with thresholds and alerts

You can now set thresholds on duration KPIs to ensure your process is in line with your expectations. You can also enable email alerts for threshold violations.

The screenshot displays the 'Create KPI' configuration page in Appian. The interface is dark-themed and includes a sidebar with navigation options: Type, Definition, Thresholds and Alerts (selected), and Properties. The main content area is titled 'Thresholds and Alerts' and contains the following elements:

- Threshold (days):** A text input field containing the value '14'.
- Current view's average case duration:** 10 days and 8 hours.
- Enable Alerts:** A checkbox that is checked.
- Alerts sent after auto-sync:** A checkbox that is checked.
- Subscribe to alerts for this KPI:** A checkbox that is checked.

On the right side, there is a 'KPI Preview' section for a 'Duration KPI'. It shows a trend graph with a blue line representing the KPI value over time. A horizontal dashed red line indicates the 14-day threshold. The current average is '10d 8h AVG' with a red upward arrow and '29%' indicating a change. The graph shows the KPI value rising above the 14-day threshold.

Based on current view: All Cases

Collaborate faster with AI Copilot in occurrence insights

appian | Process Insights > Process: Purchase Requests > View: All Cases > KPI: Count of High Priority Re... > Insight: Increase in Number of...

Insight: Increase in Number of High Priority Cases

0 Filters | 1,067 Cases

CONTINUE DRILLING DOWN | SHOW COMMENTS (0)

SUMMARY | PROCESS DIAGRAM | VALUE COMPARISON | CASE COMPARISON | OCCURRENCE TREND | CASE LIST

Comparison KPI

Count of High Priority Requests

1,864 CASES (25.76%)

Description

AI Copilot may have generated the summary and recommendations. Review for accuracy and appropriateness. [Learn more about AI Copilot](#) DISMISS

This insight highlights an **increase in the number of high priority cases** related to mobile devices from the vendor Accenture. The potential reduction if addressed is **198 cases**, which is a **33% increase** over the normal occurrence rate of 17%.

Recommendations:

1. Review the process for triaging and prioritizing cases from Accenture related to mobile devices to identify potential bottlenecks or inefficiencies.
2. Analyze the root causes for the increased volume of high priority cases, such as hardware issues, software bugs, or user errors.
3. Improve communication and collaboration with Accenture to streamline case resolution and reduce the number of escalated cases.

Insight

Characteristics

Domain = Mobile Devices

Potential Reduction

198

> Show more details

Metrics

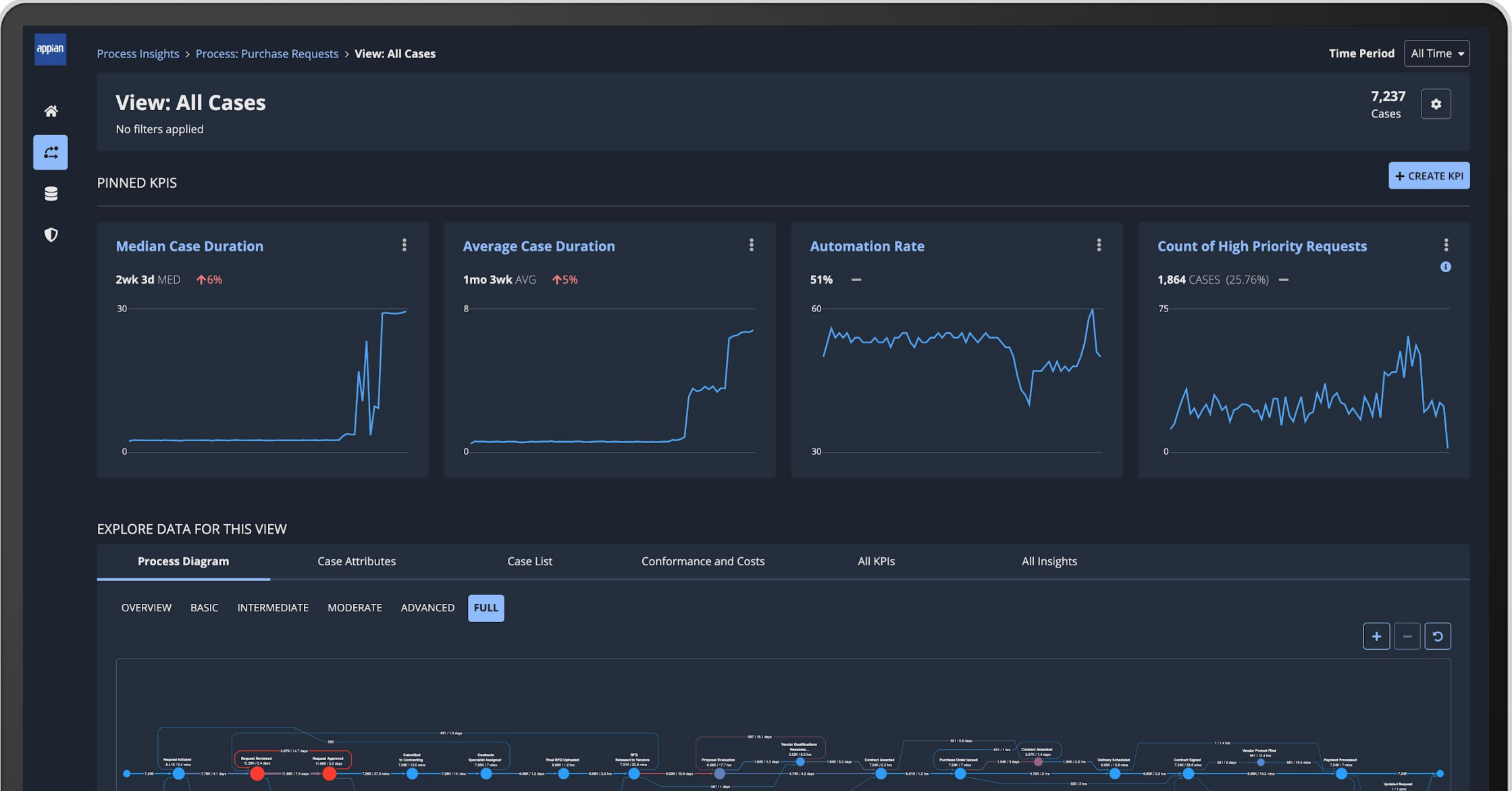
Cases Related to Count of High Priority Requests

1,067
Cases with These Characteristics

Cases Not Related to Count of High Priority Requests

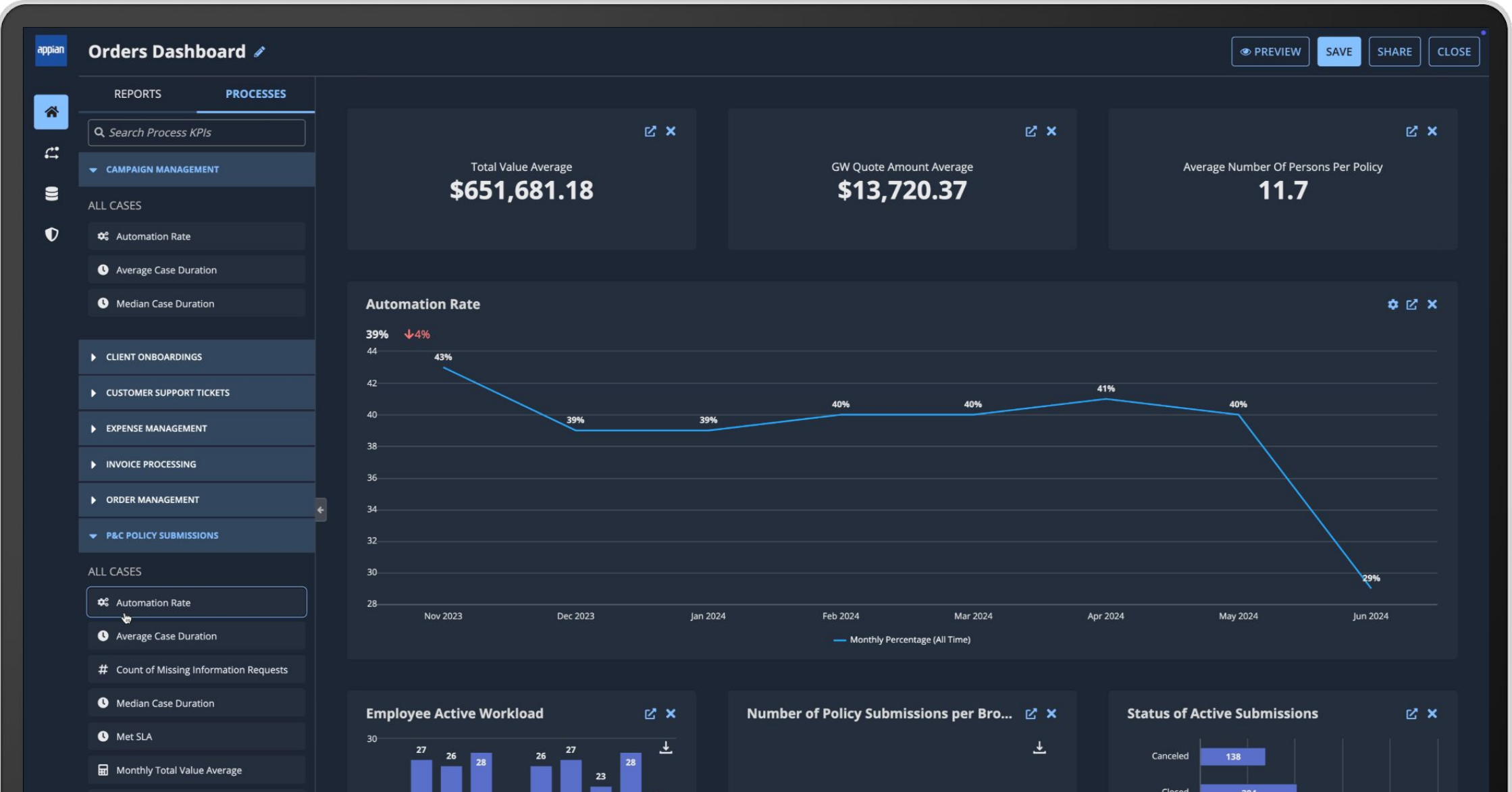
1,854
Cases with These Characteristics

Streamlined investigation of your processes



Data Fabric Insights

Add process KPIs to dashboards



Enhanced sharing for reports and dashboards

The screenshot shows the Appian 'Orders Dashboard' interface. A 'Share Dashboard' modal is open in the center, allowing users to manage access. The dashboard background features several widgets: a 'Total Value Average' of \$651,681.18, an 'Employee Active Workload' bar chart, a 'Status of Active Submissions' horizontal bar chart, and a 'Policy Submissions Grid' table at the bottom.

Share Dashboard

To view this dashboard, users must have access to the dashboard, its reports, and the data in those reports.

General Access

Allow all Process HQ Users to view

Add User

EDITOR ADD

Users with Access

User	Role
Bryan Jennings (you)	EDITOR (CREATOR)
Dashboard and Report Creators	VIEWER
Francisco Rodrigues	VIEWER

CANCEL SAVE

Orders Dashboard

EDIT DASHBOARD SHARE CLOSE

Total Value Average

\$651,681.18

Employee Active Workload

Employee	Count of Id
Benjami...	15
David Lee	27
Emily Rodriguez	26
Jessica Reynolds	28
Jonathan Evans	19
Michael Thompson	26
Olivia Smith	27
Rachel Patel	23
Samantha Carter	28
Tyler Johnson	20

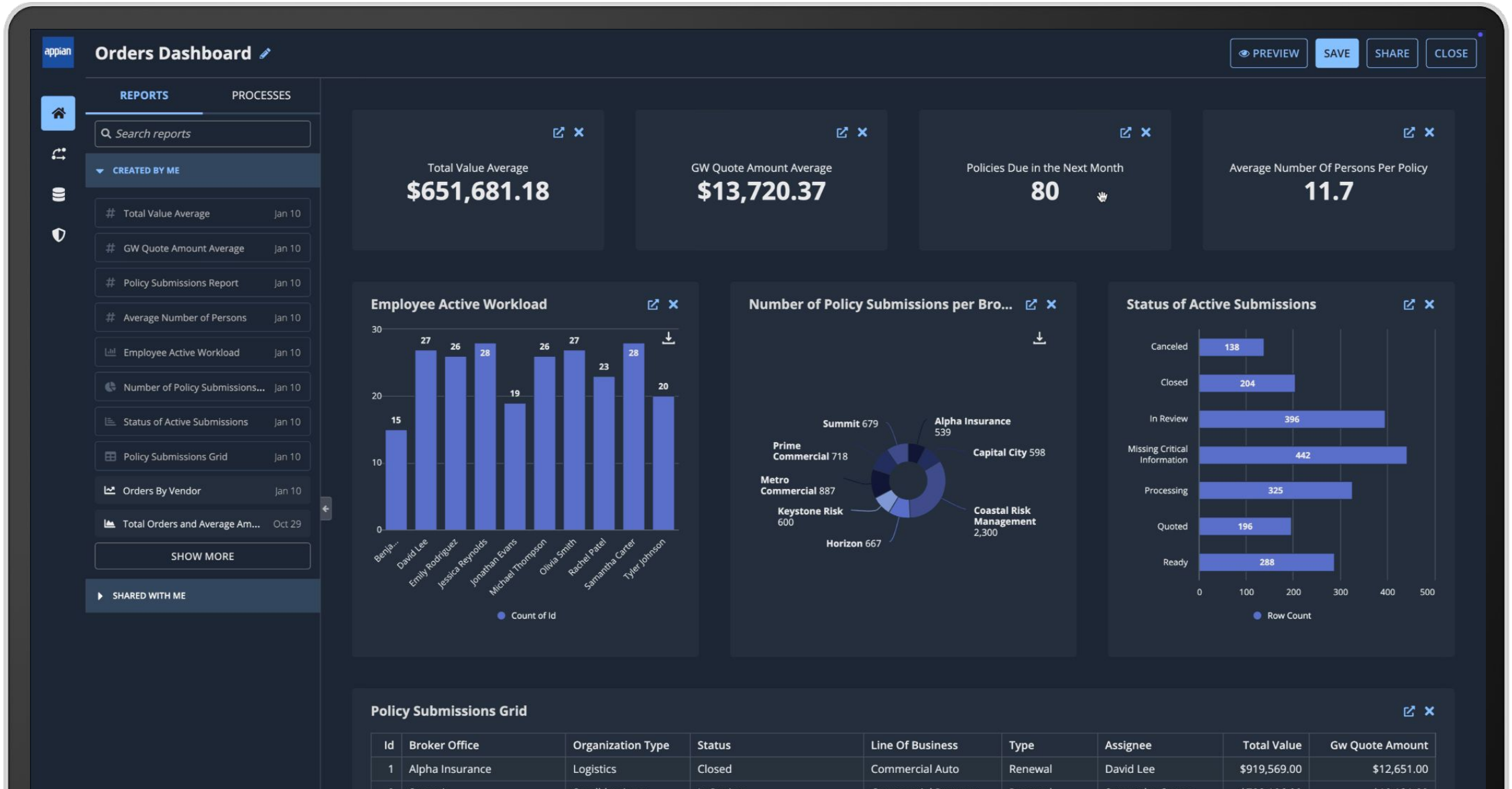
Status of Active Submissions

Status	Row Count
Canceled	138
Closed	204
In Review	396
Missing Critical Information	442
Processing	325
Quoted	196
Ready	288

Policy Submissions Grid

Id	Broker Office	Organization Type	Status	Line Of Business	Type	Assignee	Total Value	Gw Quote Amount
1	Alpha Insurance	Logistics	Closed	Commercial Auto	Renewal	David Lee	\$919,569.00	\$12,651.00
2	Summit	Small-business	In Review	Commercial Property	Renewal	Samantha Carter	\$728,106.00	\$10,131.00
3	Coastal Risk Management	Trucking	Processing	Commercial Auto	Renewal	Samantha Carter	\$409,468.00	\$19,892.00
4	Metro Commercial	Small-business	Quoted	Commercial Property	Renewal	Emily Rodriguez	\$697,994.00	\$8,538.00

Rearrange dashboards with highlighted drag and drop



Administration

James Lee | Director, Product Evangelism

Easier component plug-in deployment for self-managed

Component plug-ins can now be deployed on self-managed instances without a Developer Token or signature, streamlining the plug-in development process for custom UI components.

The screenshot displays the Appian AppMarket user interface. At the top, a navigation bar includes 'HOME', 'SUBMISSIONS', 'TASKS', and 'DEV INSTANCES'. The user is identified as 'AppMarket Submissions' with initials 'JE' and the Appian logo. The main banner features an illustration of two people holding a banner that says 'Appian AppMarket' and a personalized greeting: 'Hello, Jennifer! What would you like to do today?'. Below the banner are three action cards: 'Dev Support' (with a code icon and subtext 'Get use case pre-approval or register a developer instance'), 'New Submission' (with a plus icon and subtext 'Submit a new plug-in, utility, or solution'), and 'Visit AppMarket' (with an external link icon and subtext 'Explore what's currently available to download, rate, and review').

MY LATEST SUBMISSIONS

Name	Type	Status
You have no recent submissions. Create a new submission above or browse submissions by your colleagues in the Submissions tab.		

[More Submissions](#)

Upgraded cloud database to version 10.6.18

Your Appian Cloud Database (MariaDB) has now been upgraded to **version 10.6.18** by default.



New enhanced business continuity regions in Europe

Enhanced Business Continuity for Appian Cloud now supports sites in **multiple European regions**.

A site in one of these regions can be configured to backup to another of these regions.

New Regions
Frankfurt
Zurich
Stockholm
Milan
Ireland
London
Paris

Preparing for containerized self-managed Appian in 2025

Starting with Appian 25.4, all new versions of Appian will **require containers managed by Kubernetes to run in a self-managed environment**. You won't be able to obtain Windows or Linux installers for Appian for 25.4 and its hotfixes.

Appian 25.3 will be the **last supported non-containerized version** and will be supported with hotfixes and critical updates for two years after release (Fall 2027).

appian



kubernetes

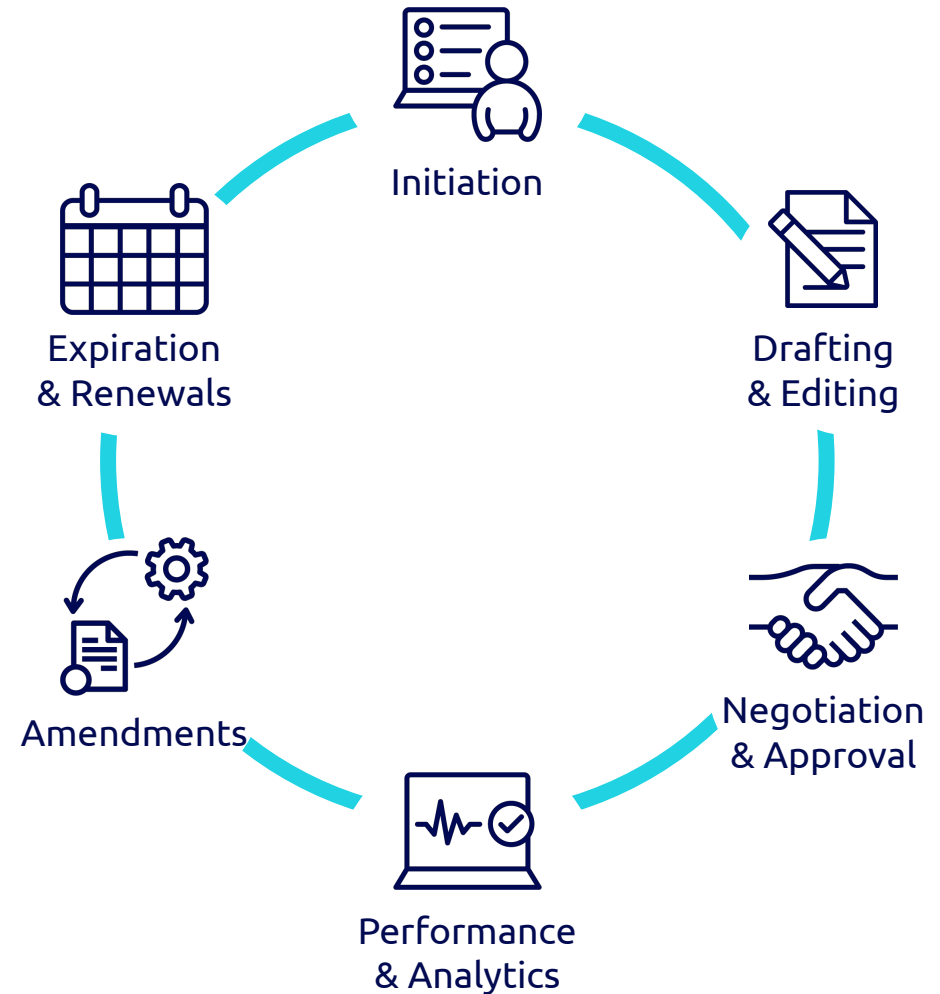
Beta Programs

Elizabeth Hall | Sr Beta Program Manager

Contract Lifecycle Management (CLM)

Example use cases:

- Procurement contracts
- Sales contracts
- Partnership contracts
- Professional services contracts
- Employment contracts



Appian Beta Program Page on Community

appianCommunity

Sign In/Register

DISCUSS LEARN SUCCESS SUPPORT DOCUMENTATION APPMARKET

Appian Beta Program

Explore in-progress and upcoming beta programs, results from our previous beta programs, and more!

I'm looking for ...



About

Welcome to the Appian Beta Program Community site! By participating in any of Appian's beta programs, you'll have the unique opportunity to gain early access to our latest innovations and get the chance to provide feedback to help shape the direction of the product. Additionally, you'll



Community

Kait Bonifaz | Product Evangelist

2024 Community Discussion Leaders



Stefan Helzle
Bechtle



Mike Schmitt
SOC LLC



Konduru Chaitanya
Yexle



Harshit Bumb
Appyzie Technologies



Shubham Aware
Vuram



Mathieu Drouin
Division 61



David Jimenez Calleja
Minsait



Venkat Avuluri
Yexle



Soma Sundaram
Appian



Karumuru Abhishek
Yexle

EA Community Edition Available to Certified Users

Get **hands-on** with Appian 25.1 before features are generally available!

All **Appian Certified users** are welcome to register. Environment will be upgraded with each EA release.

Ask questions and engage in the [25.1 EA discussion forum](#).

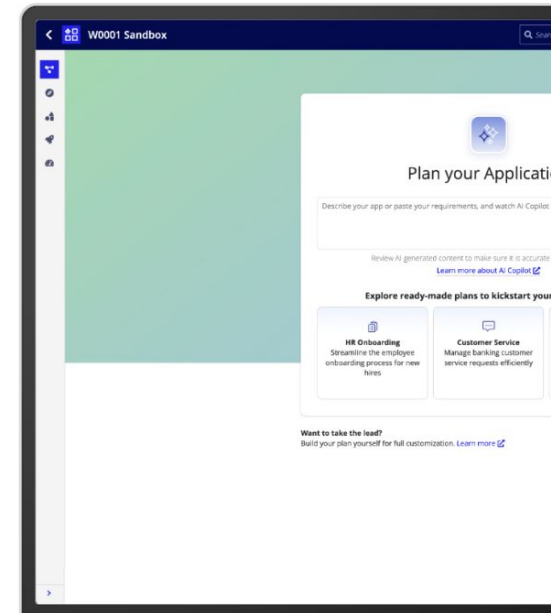
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Get Early Access to 25.1

Be among the first to explore the 25.1 release—designed specifically for the certified community.

As a certified developer, this is your chance to experience it all before everyone else. Start building today!

GET MY WORKSPACE



Case Management Studio Trial

Experience a **28 day free trial** of case management studio with a fully staged demo use case, including both in-product and online tutorials.

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CA appian

Case Management Studio

Build enterprise apps without code

Unlock a new level of efficiency in case management with our intuitive, AI-powered platform. Appian Case Management Studio empowers your team to build custom workflows and streamline complex cases with ease.

Try it now and see how Appian can drive fast, flexible, and compliant processes for your organization.

[START TRIAL NOW](#)

The screenshot displays the Appian Case Management Studio interface. The top navigation bar includes 'WORKSPACE', 'CASES', and 'ENTITIES'. The main dashboard is divided into several sections:

- Quick Actions:** Includes 'Submit Case', 'Create Entity', and 'Manage Case Types'.
- My Cases:** Displays a list of cases with details such as 'Duplicate Transaction', 'Incorrect Amount Charged', and 'ACH Payment Not Received'. Each case entry includes a status (e.g., 'In Progress'), assignee (e.g., 'Linda Jones'), and due date (e.g., 'Due Nov 17, 2024').
- Recent Activity:** Shows a log of recent actions, such as 'Robert Ward added a related case' and 'Paul Rao updated a document'.
- My Tasks:** A table listing tasks assigned to the user or a group. The table has columns for 'Task', 'Status', 'Case', and 'Due'.

Task	Status	Case	Due
Arbitrate Case	Ready	CCD-7AAB11 Incorrect Amount Charged	Nov 23, 2024
Arbitrator Decision	Ready	CCD-8CB43F Duplicate Transaction	Nov 28, 2024
- Expected to Meet Deadline:** Two circular progress indicators showing 100% completion.
- My Due Dates:** A calendar view for October 2024, with a legend for 'No tasks or cases due this month'.

The bottom of the interface shows the version number 'Case Management 24.21.5.0'.

Shared Workspaces in Appian Community Edition

The screenshot displays the Appian Community Edition user interface. At the top left is the Appian logo. The main header area contains a personalized greeting: "Hello, Sam Welcome to Appian Community Edition!". Below this, there is a brief introduction to Appian and a list of capabilities: "Integrate data from external systems", "Build powerful reports with point-and-click", and "Design easy-to-use user experiences fast". A prominent blue button labeled "BUILD YOUR FIRST APP" is present. A secondary link "Continue to Appian Designer" is also visible. On the right side, a sidebar titled "MY WORKSPACE" features a red-bordered box highlighting a "Fun Shared Workspace" with ID "W0004" and a "Shared" status. Below this, an "EXPLORE" section lists "App Catalog", "Designer", and "SAIL UI Gallery". An "ACTIONS" section includes an "INVITE PEERS" button. The bottom of the page features a "Appian Developer Learning Path" section with an illustration of a person and text describing a series of courses for new developers.

appian SB

Hello, Sam
Welcome to Appian Community Edition!

Get hands-on with Appian: the fastest way to design, automate, and optimize end-to-end business processes.

Build an app from scratch to track SpaceX launches and experience the speed of low-code application development. Learn how to:

- Integrate data from external systems
- Build powerful reports with point-and-click
- Design easy-to-use user experiences fast

BUILD YOUR FIRST APP

Already following a course exercise? Continue to [Appian Designer](#)

Questions or feedback? [Email us!](#)

MY WORKSPACE

Fun Shared Workspace
Workspace ID: W0004 Shared

EXPLORE

- App Catalog
- Designer
- SAIL UI Gallery

ACTIONS

INVITE PEERS

Appian Developer Learning Path

For new Appian developers, take this series of courses to learn how to navigate the Appian platform and build an application. You'll also:

- Learn app-building best practices,

Autoscale available in Appian Community Edition

Access your community edition workspace today to **get hands-on** with the autoscale capabilities!

The screenshot displays the Appian Process Modeler interface. The main workspace shows a workflow diagram with a 'Start Node' leading to a 'Cancel?' gateway, which then branches into two paths: one leading to 'Attach Approval PDF to Campaign' and another to 'Budget Approval Document?'. A 'System / APIs' sidebar is visible on the left. A 'Process Model Properties' dialog box is open, showing details for the process model 'OF Create or Update Campaign v1.0'. The dialog includes tabs for General, Variables, Process Start Form, Deadlines, Alerts, and Data. The General tab is active, displaying the following information:

- Created on:** 9/25/2024 10:47 AM by Deployment Service Account
- Last Modified on:** 9/25/2024 10:47 AM by Deployment Service Account
- Process Model ID:** 195684
- Process Model UUID:** 0002ebd2-2228-8000-028f-7f0000014e7a
- Process Model Name:** OF Create or Update Car
- Description:** Action to create or update a campaign.
- Process Display Name:** =OF Create Or Update C
- Autoscale:** Use process autoscaling

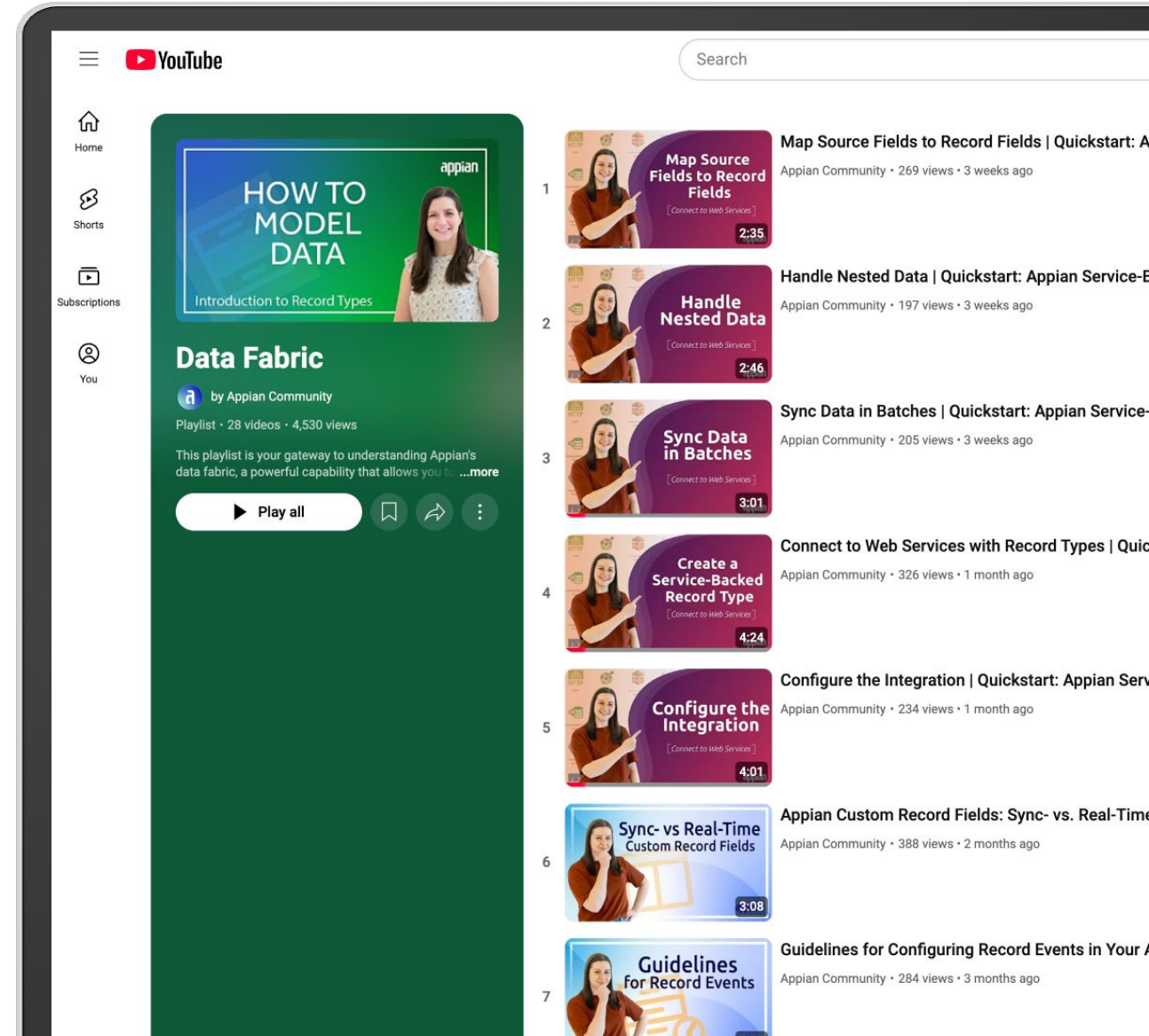
A 'CANCEL' button is visible at the bottom of the dialog box.

Appian Community YouTube Channel

Providing **timely** and **accessible learning** content for teaching **Appian practitioners** to **build successfully**.

Check out our recent playlist on connecting to web services with record types!

**Next livestream:
25.1 Release Highlights**





Appian World

Developer Engagement



Dev Con

Developer keynote, hands-on labs, and more



Live Build Challenge

Applications due February 21st



Community Hub

Product demos, resources, and networking

appian

the process company

