

Appian 24.3 Product Announcement Webinar

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Sr Product Manager

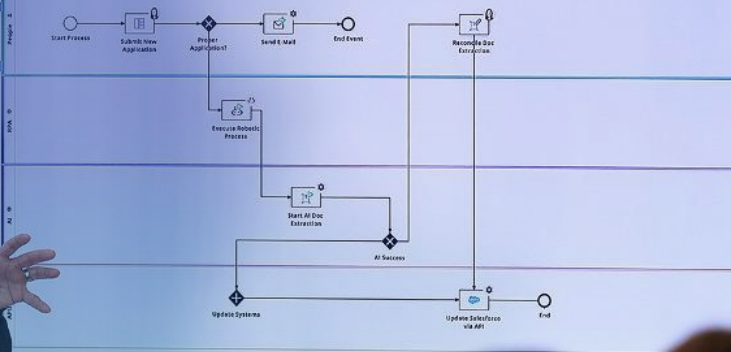
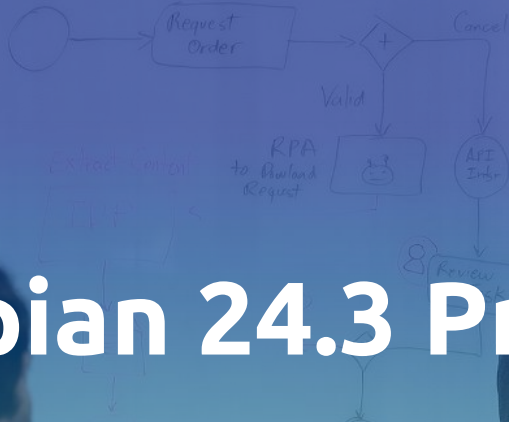
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Sr Product Manager II

Sr Beta Program Manager

Product Evangelist

Appian Process Modeler





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Government

October 30, 2024

Capital One Hall | Tysons, VA

appiangovernment.com

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appian | Europe

3 December, 2024 | InterContinental London, The O2

Process Automation
that moves business forward.

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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**

2024

Quarterly Updates

{year}.{release that year}

JANUARY

M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

FEBRUARY

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MARCH

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24.1

APRIL

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MAY

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JUNE

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24.2

JULY

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AUGUST

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SEPTEMBER

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30						

24.3

OCTOBER

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21	22	23	24	25	26	27
28	29	30	31			

NOVEMBER

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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

DECEMBER

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

24.4

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24.3 Release
August 16th, 2024

Gartner®

Appian is a
Gartner® Magic
Quadrant™ Leader

Design

A Leader in the 2023 Gartner® Magic Quadrant™
for Enterprise Low-Code Application Platforms

Automate

#1 for Business Workflow Automation with
Integration Use Case

Optimize

A Leader in the 2024 Gartner® Magic Quadrant™
for Process Mining Platforms

Low-Code Design



AI-Copilot for Developers

Full Release: AI-Generated Test Cases for Rules



The screenshot shows the Appian IDE interface. At the top, the rule name is `NZC_GetTotalEmissionsByShipmentSegment`. The left pane shows the rule's expression code:

```
1 fn!quotient(  
2   product(  
3     r!segment[NZC Shipping Lane.distance],  
4     /*convert from kg to tonne*/  
5     quotient(  
6       r!segment[NZC Shipping Lane.weight],  
7       1000  
8     ),  
9   )!  
10 )!
```

The right pane shows the 'Rule Inputs' table:

Name	Description	Type	Array
segment	Add	NZC...	<input type="checkbox"/>

The main area displays 'Generated Test Cases' with a warning: 'There are complicated rule inputs in your expression rule that may impact generated test case quality. Review the generated test cases for accuracy and adjust if necessary.'

<input checked="" type="checkbox"/>	Name	Output	Assertion	Time (ms)	segment
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Calculates emissions for air travel less than max distance	1	Output: 1	1	[NZC Shipping Lane distance=1000, weight=500, travel...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Calculates emissions for truck travel	3	Output: 3	1	[NZC Shipping Lane distance=500, weight=2000, travel...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Calculates emissions for sea travel	1	Output: 1	1	[NZC Shipping Lane distance=10000, weight=5000, tra...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Calculates emissions for rail travel	1	Output: 1	1	[NZC Shipping Lane distance=2000, weight=1000, trav...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Handles invalid travel mode	1	Output: 1	1	[NZC Shipping Lane distance=1000, weight=500, travel...
<input checked="" type="checkbox"/>	<input type="checkbox"/> Handles null or empty segment	ERROR	No errors		null

6 items


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

Case Management Studio

Public Self Registration

Users can now **self register** for an Appian account through the public portal. Once registered, log in order to **claim and stay updated** on existing cases.

appian HOME SUBMIT CASE CHECK STATUS FAQ MY ACCOUNT CONTACT US



Register for an account

First Name *

Last Name *

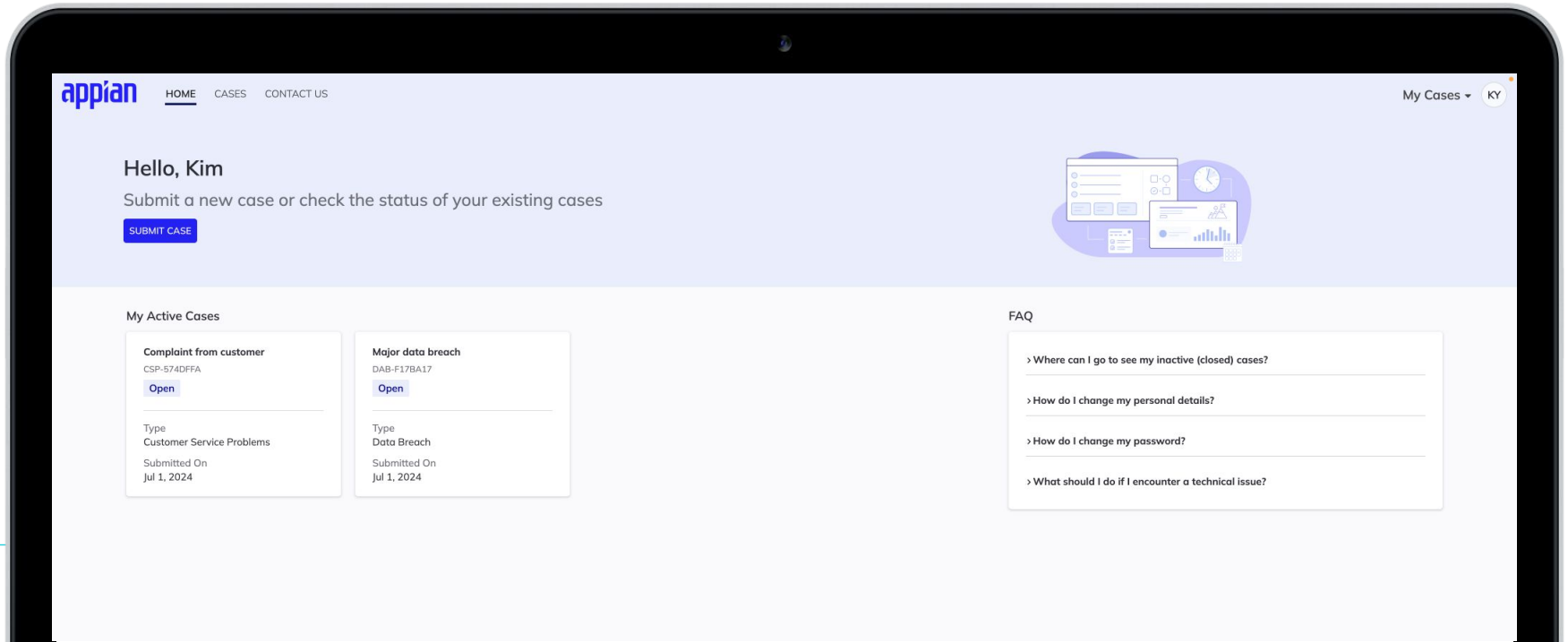
Email *

REGISTER

Already have an account? [Log In](#)

Focused Case Experience

New module allows Case Management Studio customers to provide a site for minimal users to have access to only their own cases.



Summarize Case Comments with AI



Get up to speed with case commentary with AI Copilot.

A screenshot of the Appian case management interface. The top navigation bar includes the Appian logo, 'WORKSPACE', 'CASES' (which is underlined), and 'ENTITIES'. The main header for the case is 'RSP-3701CAB Urban Oasis Residence'. Below this, there are tabs for 'Summary', 'Tasks', 'Documents', 'History', and 'External Messages'. The 'Summary' tab is active. The 'Comments' section is visible, with sub-tabs for 'Case', 'All', and 'Pinned'. The 'Case' sub-tab is selected. There is an 'ADD COMMENT' button and a search bar labeled 'Search comments'. A blue box highlights an AI-generated summary titled 'AI Copilot - Comment Summary'. The summary text reads: 'Review generated content to make sure it's accurate and appropriate'. Below this, there is a bulleted list of key points from the comments. The first comment is from Amy Lee, dated May 15, 2024, 8:34 PM, by Anthony Hill. The comment text asks about sustainable practices and materials. The second comment is from Laura Davis, dated Apr 14, 2024, 12:24 AM, by Stephen Singh and Edward Phillips. The comment text asks about measures to ensure the project aligns with the overall urban aesthetic. The third comment is from Peter Harris, dated May 9, 2024, 3:03 PM.

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WORKSPACE

CASES

ENTITIES

RSP-3701CAB Urban Oasis Residence

Summary

Tasks

Documents

History

External Messages

Comments

Case

All

Pinned

ADD COMMENT

Search comments

AI Copilot - Comment Summary

Review generated content to make sure it's accurate and appropriate

- The concept of an Urban Oasis Residence that prioritizes green spaces and community was discussed.
- Commenters inquired about plans for community engagement and addressing traffic/parking impacts.
- The potential use of the home office space and inclusion of green spaces/plants in the landscaping was mentioned.



Amy Lee

May 15 2024 8:34 PM

Anthony Hill —

Has the homeowner considered any sustainable practices or materials in the enhancements, apart from not incorporating solar panels? It could contribute to the project's environmental impact.

Reply



Laura Davis

Apr 14 2024 12:24 AM

Stephen Singh, Edward Phillips —

What measures is the homeowner taking to ensure the project aligns with the overall urban aesthetic? Ensuring coherence with the surrounding environment is crucial.

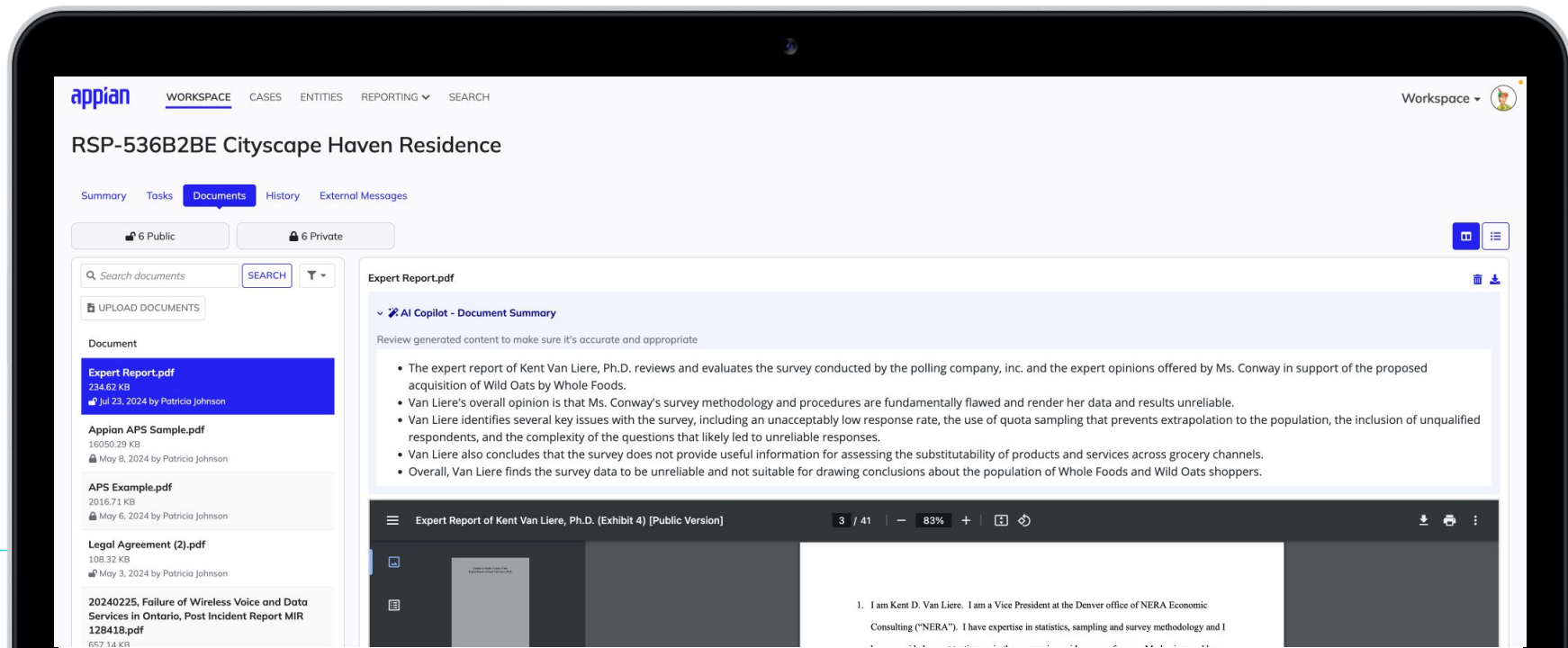


Peter Harris

May 9 2024 3:03 PM

Summarize Case Documents with AI

With the new **PDF summarization module**, you can save time reviewing case documents thanks to an AI powered summary of the document's contents.



The screenshot displays the Appian workspace interface for a case titled "RSP-536B2BE Cityscape Haven Residence". The interface includes a navigation bar with "WORKSPACE", "CASES", "ENTITIES", "REPORTING", and "SEARCH". The "Documents" tab is active, showing a list of documents on the left and a detailed view of "Expert Report.pdf" on the right. The document view includes an "AI Copilot - Document Summary" section with a list of key findings.

Document List:

- Expert Report.pdf** (234.62 KB) - Jul 23, 2024 by Patricia Johnson
- Appian APS Sample.pdf** (16050.29 KB) - May 8, 2024 by Patricia Johnson
- APS Example.pdf** (2016.71 KB) - May 6, 2024 by Patricia Johnson
- Legal Agreement (2).pdf** (108.32 KB) - May 3, 2024 by Patricia Johnson
- 20240225, Failure of Wireless Voice and Data Services in Ontario, Post Incident Report MIR 128418.pdf** (657.14 KB)

Expert Report.pdf Summary:

AI Copilot - Document Summary

Review generated content to make sure it's accurate and appropriate

- The expert report of Kent Van Liere, Ph.D. reviews and evaluates the survey conducted by the polling company, inc. and the expert opinions offered by Ms. Conway in support of the proposed acquisition of Wild Oats by Whole Foods.
- Van Liere's overall opinion is that Ms. Conway's survey methodology and procedures are fundamentally flawed and render her data and results unreliable.
- Van Liere identifies several key issues with the survey, including an unacceptably low response rate, the use of quota sampling that prevents extrapolation to the population, the inclusion of unqualified respondents, and the complexity of the questions that likely led to unreliable responses.
- Van Liere also concludes that the survey does not provide useful information for assessing the substitutability of products and services across grocery channels.
- Overall, Van Liere finds the survey data to be unreliable and not suitable for drawing conclusions about the population of Whole Foods and Wild Oats shoppers.

Document Preview: Expert Report of Kent Van Liere, Ph.D. (Exhibit 4) [Public Version] | 3 / 41 | 83%

1. I am Kent D. Van Liere. I am a Vice President at the Denver office of NERA Economic Consulting ("NERA"). I have expertise in statistics, sampling and survey methodology and I

Quickly View Assigned and Unassigned Tasks

The screenshot displays the Applan workspace interface. At the top, there's a navigation bar with 'WORKSPACE', 'CASES', 'ENTITIES', 'REPORTING', and 'SEARCH'. The user's name 'Workspace' is visible in the top right.

Quick Actions: A sidebar on the left contains four buttons: 'Submit Case', 'Create Entity', 'Manage Reports', and 'Manage Task Blocks'.

My Cases: A grid of six case cards is shown. Each card includes a case ID, title, status (e.g., 'Open', 'In Progress'), and assigned user. A red box highlights the 'Assigned to Group' filter in the 'My Tasks' section below.

My Tasks: A table lists tasks with columns for Task, Status, Case, Assigned Group, and Due. The tasks include 'Grant Review Decision', 'Upload Product Specifications', 'Background Checks', and 'Confirmation of Witness Statements'.

Expected to Meet Deadline: Two circular progress indicators show '39% Cases' and '62% Tasks'.

My Due Dates: A calendar for July 2024 shows due dates for various tasks, with a note at the bottom: 'Select a date to view your pending tasks and cases.'

Bulk Change Cases

Update Cases ✕

Select Cases | Step 1 of 2

SEARCH

STATUS | Any
PRIORITY | Any
CASE TYPE | Any
TAGS | Any

ASSIGNEE | Any
ASSIGNED GROUP | Any
DUPLICATE | Any - Any

Case	Status	Created By	Assignee	Due	Last Updated
<input checked="" type="checkbox"/> CTA-5A626CD Defective Appliance <small>Corporate - Contracts and Agreements Documentation</small>	In Progress	Mary King	James Baker, Patricia Johnson <small>Unassigned</small>	Jul 26, 2024	Jul 23, 2024 <small>Tori Marquis</small>
<input checked="" type="checkbox"/> CMD-A63E38B Protecting Innocence: Domestic Violence Defense <small>Legal - Criminal Defense</small>	Open	Automated System	James Baker, Anthony Hill <small>CMGT DD System Administrators</small>	Jul 26, 2024	Jul 23, 2024 <small>Tori Marquis</small>
<input checked="" type="checkbox"/> CTA-05484F5 Inaccurate Information provided by Airline <small>Corporate - Contracts and Agreements</small>	In Progress	Automated System	Patricia Johnson <small>CMGT Case Workers, CMGT Service Accounts</small>	Dec 9, 2024	Jul 19, 2024 <small>Michael Cooper</small>
<input type="checkbox"/> PRD-FA30A2F Poor Customer Service - Internet Provider <small>Incident - Property Damage Follow-up</small>	In Progress	Linda Jones	Kevin Reed, Patricia Johnson <small>Unassigned</small>	Dec 16, 2024	Jul 19, 2024 <small>Carol Wilson</small>
<input type="checkbox"/> SMW-1053149 Performance Optimization Director <small>Many Workflows - Sales and Marketing Workflows Important, Compliance</small>	In Progress	Automated System	James Baker, Patricia Johnson <small>CMGT Business Groups</small>	Dec 10, 2024	Jul 19, 2024 <small>Virginia Lane</small>
<input type="checkbox"/> SMW-79FEA27 Efficiency Architect: Sales & Marketing <small>Many Workflows - Sales and Marketing Workflows</small>	In Progress	Peter Harris	Patricia Johnson, Ruth Jackson <small>Unassigned</small>	Oct 24, 2024	Jul 19, 2024 <small>Brigid Kessler</small>
<input type="checkbox"/> PRD-1741FA2 Property Damage Assessment and Repair <small>Incident - Property Damage Quality Assurance, Reminders</small>	In Progress	Brian Chen	Susan Williams, James Baker <small>CMGT Finance</small>	Nov 19, 2024	Jul 18, 2024 <small>Stephen Singh</small>
<input type="checkbox"/> SMW-73DAAGA Efficiency Navigator: Sales & Marketing <small>Many Workflows - Sales and Marketing Workflows Troubleshooting, Reporting</small>	In Progress	Automated System	Michael Cooper <small>ACH Managers</small>	Sep 12, 2024	Jul 17, 2024 <small>George Garcia</small>
<input type="checkbox"/> PQP-B17E099 Faulty Product - Television <small>Problem - Product Quality Problems Appeals</small>	Open	Phillip Sanchez	James Baker, Virginia Lane <small>CMGT Finance, ACH Operators</small>	Oct 2, 2024	Jul 17, 2024 <small>Paul Rao</small>
<input type="checkbox"/> CMD-F072B32 Presumption of Innocence: Theft Defense Litigation <small>Legal - Criminal Defense</small>	In Progress	Automated System	James Baker <small>CMGT Case Managers</small>	Nov 22, 2024	Jul 16, 2024 <small>Maria Lopez</small>
<input type="checkbox"/> SMW-F775DD5 Sales & Marketing Process Maestro <small>Many Workflows - Sales and Marketing Workflows Pending</small>	Open	Automated System	James Baker, Patricia Johnson <small>CMGT Case Workers</small>	Dec 5, 2024	Jul 16, 2024 <small>Lisa Walker</small>
<input type="checkbox"/> SMW-857E37C Sales & Marketing Process Strategist <small>Many Workflows - Sales and Marketing Workflows Reporting, Communication</small>	In Progress	Maria Lopez	James Baker <small>CMGT Business Groups, ACH Operators</small>	Dec 5, 2024	Jul 16, 2024 <small>Chris Watkins</small>
<input type="checkbox"/> PRD-5388A12 Storm Damage Repair Experts <small>Incident - Property Damage Reporting</small>	In Progress	Automated System	Patricia Johnson <small>Unassigned</small>	Sep 25, 2024	Jul 15, 2024 <small>Daniel Nelson</small>
<input type="checkbox"/> PQP-59C1DB5 Late Delivery	In Progress	Maria Lopez	Patricia Johnson	Nov 26, 2024	Jul 13, 2024

CANCEL
NEXT

Use Natural Language to Create Data Fields



appian CASE TYPES TASKING Studio AU

All Case Types / IT - Information Technology / Device Request

Technology

- Device Request
- License Request
- Service Request

Enable custom category fields

Add data fields to the category in the Data tab before adding data fields to the case.

Create Data Fields

Tell us what information to capture
You can modify the prompt and regenerate at any time, which will overwrite all field values below.

Request specifications (e.g. memory, storage capacity, processor type)
Operating system requirements

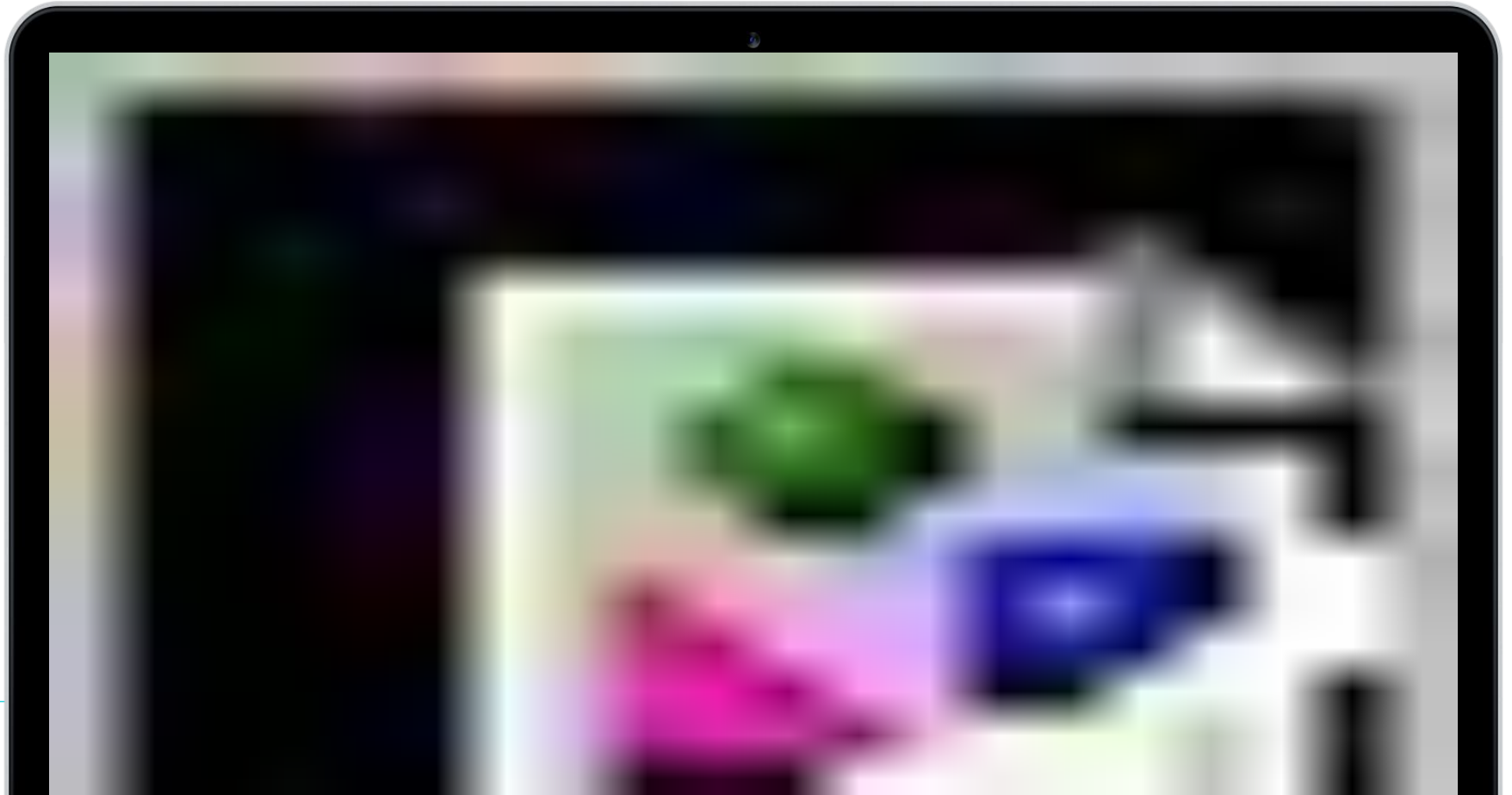
Reason for the request (e.g. new employee, replacement, upgrade)
Timeline or deadline for when hardware is needed

GENERATE

Name	Type		
Requestor Name	Short Text	☰ ✨	✖
Requestor Department	Short Text	☰ ✨	✖
Requestor Contact Information	Long Text	☰ ✨	✖
Type Of Hardware	Choice List	☰ ✨	✖

CANCEL CREATE

Add or Update Multiple Choice List Field Options



Save Drafts in Updated Wizard Layout Function

The screenshot shows the Appian Studio interface for configuring a wizard layout. The main workspace displays a form with the following fields:

- Name of Requested Individual ***: A text input field.
- Nationality ***: A dropdown menu with a "Select" option.
- Current Location of Individual**: A text input field with a placeholder "(if applicable) Where is the individual currently residing?".

At the bottom of the form, there are two buttons: "SAVE DRAFT" (highlighted with a red box) and "NEXT".

The right-hand sidebar shows the configuration panel for "studio_wizardLayout". The "allowSaveDraft" checkbox is checked and highlighted with a red box. Other configuration options include:

- label**: Customer Intake
- sections**: List of Any Type
- formStyle**: MULTL_PAGE
- formIntent**: CREATE
- hasLeadingPage
- leadingPageNames**: List of Text
- hasFollowingPage
- followingPageNames**: List of Text
- onSubmit**: if
- onCancel**: List of Save
- onBack**: save
- allowSaveDraft
- onSaveDraft**: List of Save

You can now **configure the names of steps** in the intake form wizard and enable your users to **save drafts** of their intake form submissions.

Total Experience

Naveen Hariharan | Product Manager II

Elevate Multi-Pane Experiences: Add Headers

The screenshot displays an email client interface with a dark blue header. The header contains the 'appian' logo on the left and 'Inbox' with a profile picture on the right. Below the header is a light blue banner with the text 'Good Morning, Ella!'. A navigation bar below the banner shows categories: 'Inbox (3)', 'Important (2)', 'Updates (2)', 'Promotion (4)', and 'Spam (0)'. The main content area is split into two panes. The left pane shows a list of email previews, each with a circular profile picture, sender name, subject, and date. The right pane shows a detailed view of an email from 'Clay Nelson' with the subject 'Complete onboarding for new supplier'. The email body contains a greeting, an introduction, a list of steps for onboarding, and information about payment terms and penalties.

appian Inbox

Good Morning, Ella!

Inbox (3) **Important (2)** **Updates (2)** **Promotion (4)** **Spam (0)**

Complete onboarding for new supplier Yesterday

Important

Holly Golightly to me Jul 1
Please upload immediately

Jennifer Anderson to me, Rita Ramos, and Jorge Pena Jul 1
Will be on PTO

Important **Updates**

Clay Nelson to me and Alice Dixon Jul 1
Complete onboarding for new supplier

Darnell Warner to me Jul 1
Facility Cleaning

Brandon Pittman to me, Rita Ramos, and Jorge Pena Jul 1
Sign Up for Special Offers - 50% Off

Spam

Clay Nelson to me and Alice Dixon Jul 1
Complete onboarding for new supplier

CN **Clay Nelson** to me, Rita Ramos, and Jorge Pena Yesterday
Complete onboarding for new supplier

Dear All,

We are excited to welcome you as a new supplier for ABC Manufacturing. To ensure a smooth onboarding process and to start our collaboration efficiently, we kindly ask you to complete the necessary steps outlined below.

Steps to Complete Onboarding:

- 1) Provide Company Information. Complete the attached Supplier Information Form. This is the crucial first step.
- 2) Attach a copy of your business license and tax ID certificate. For more information on what licenses and certificates are valid, go to your official state website. Certificate of assumed name Sole proprietorships and general partnerships that do business under a trade name need to file this certificate with the county clerk in each county where they operate.
- 3) Submit Required Documents:
 - Supply us with your current W-9 form.
 - Include a list of your products/services with detailed descriptions and pricing.
- 4) Agree to Terms and Conditions. Review and sign the attached Supplier Agreement.

Ensure you understand our payment terms and delivery expectations, business relationship and avoiding potential misunderstandings or disputes. Let me explain each aspect in detail to give you a comprehensive understanding.

Payment terms encompass several key components that define how transactions are handled. First, it is essential to know the accepted payment methods, which could include credit cards, bank transfers, checks, or digital payment platforms like PayPal. Each method might have different processing times and fees associated with them, so being aware of these details helps in planning accordingly.

Next, the payment schedule is a critical element. This schedule outlines when payments are due and can vary widely. Common schedules include payment upon order, net 30 days (meaning payment is due 30 days after the invoice date), or installment payments. Understanding this schedule is vital for managing your cash flow effectively and ensuring that payments are made on time to avoid late fees or service interruptions.

Another important aspect is the penalties for late payments. It is important to familiarize yourself with any penalties that might be applied if payments are not made on time. These penalties could be a fixed fee or a percentage of the outstanding amount. Knowing these details can help you avoid unnecessary extra costs and maintain a good relationship with the vendor.

On the flip side, some agreements might offer discounts for early payments. These discounts can be an excellent way to save money if your cash flow allows for early payment. Taking advantage of these

Add Links to Tag Items

The screenshot displays the Appian real estate dashboard. On the left is a sidebar with filters, and the main area shows a grid of property listings.

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FILTERS

Listing Number

Priority
All priorities

Type
All types

Property Features

- Central air
- Outdoor kitchen
- Pool

Status

- New
- Open house
- Reduced
- No offers

Status

New Open house **Reduced** No offers

Listed
01/01/2024 to 07/30/2024

Offered
01/01/2024 to 07/30/2024

Listing Agent
All Customers

NEW LISTING

\$2,695,000 2d

3 Beds • 2.5 Baths • 2,403 Sq. Ft.
12345 Maple Ave, Palm Springs, CA 92262

NEW LISTING OPEN HOUSE SCHEDULED

\$3,150,000 15d

4 Beds • 3.5 Baths • 2,942 Sq. Ft.
2345 Mesa Blvd, Palm Springs, CA 92264

OPEN HOUSE SCHEDULED

\$1,945,000 26d

3 Beds • 2.5 Baths • 2,178 Sq. Ft.
345 Main St, Cathedral City, CA 92234

PRICE REDUCED

\$7,092,000 33d

5 Beds • 4.5 Baths • 3,219 Sq. Ft.
45678 Desert Ln, Palm Desert, CA 92260



Demo



Design Interfaces, Even Faster



SPEED UP!

This release, Design mode in the interface object is now up to **20% faster**—enabling you to make your ideas a reality quicker than ever.

Mobile: Optimized Offline Form Re-Evaluations



SPEED UP!

We've continued optimizing the offline mobile experience with **improved** performance for **offline form** re-evaluations.

Data Fabric

Juliana Kutch | Sr Product Manager

Manage Source Data in New Data Preview Page

We've moved the Data Preview into its own page and added the ability to **add** and **edit** source data, directly from your record type!

The screenshot displays the 'Data Preview' interface for 'NZC Case Status'. The top navigation bar includes 'SAVE CHANGES', a search icon, a settings icon, a user profile icon, and the 'appian' logo. The left sidebar lists navigation categories: DATA (Data Model, Data Preview, Events, Sync Options), USER EXPERIENCE (List, Filters, Views, Actions, Workspaces), SECURITY (Record-Level Security, Views and Actions Security), and MONITORING (Performance, Sync History). The main content area is titled 'Data Preview' and features a search bar with the placeholder 'Search values' and a '+ ADD ROW' button. Below the search bar, a message states 'Preview upto 1,000 rows in the data source, or search for a specific row'. A table displays the data with columns: id (Number (Integer)), label (Text), description (Text), icon (Text), and color (Text). The table contains 5 rows of data, each with a blue pencil icon in the 'id' column for editing. The bottom right corner of the table indicates '5 items'.

id	label	description	icon	color
1	Task Group In Progress	Tasks sent to their assignees	spinner	#3a77e9
2	Creator Review	Review a completed task group	spinner	#3a77e9
3	Tasks Complete	Tasks complete, case can be closed	check	#127d21
4	Closed - Incomplete	Closed with incomplete tasks	check	#808080
5	Closed	Closed with all tasks completed	check	#127d21

Demo

Enable More Collaboration on Your Records

The screenshot displays a record interface with a dark header and a light content area. On the left, a 'DURATION' card shows '7 months'. Below it, a line chart tracks data from June to December for the year 2024. The main content area is titled 'Event Stream' and features a threaded discussion. The discussion includes a comment from Sam Knecht asking James Lee to review branding consistency, a reply from James Lee setting up a sync, and another reply from Francisco Rodrigues asking to move the time. A text editor at the bottom shows James Lee adding a meeting room. The interface includes a search bar, a 'TOUCHPOINT' label, and a 'Remote Work Ess...' button.

DURATION
7 months

herals, and sustainably sourced accessories. The strategy involves

otprint and energy costs with our products.

Event Stream

Add a comment with @ to mention someone

New To Old Filters

Sam Knecht
Apr 29, 2024 3:37 PM
@James Lee can we get the team together to review branding consistency before finalizing?

Reply | Hide replies (2) ^ Remote Work Ess...

James Lee
Jul 23, 2024 7:00 AM
I set up a short sync at 1 pm EST. Does that work?

Francisco Rodrigues
Jul 23, 2024 9:00 AM
@James Lee Can we move up the time by 30 minutes?

B I U S | ≡ ≡

I am adding a meeting room for the sync.

CANCEL POST

James Lee Sent Back for Revision
Apr 11, 2024 10:49 AM
@Sam Knecht could you please update with the latest graphics from the creative team?

Comment v Remote Work Ess...

System Sent Data to HubSpot
Apr 11, 2024 10:24 AM
Comment v Remote Work Ess...

SEARCH

TOUCHPOINT

We've continued optimizing collaboration with **threaded discussions** for better organization.

Highlight important details in each reply with **new styled text options**, like bold, italics, lists, and more.

Export Query Performance Details to Excel

The screenshot displays the Appian Query Performance interface. The top navigation bar includes the 'Order Fulfillment' title, a search bar for 'Search objects', and the Appian logo. Below the navigation bar, there are several tabs: HEALTH DASHBOARD, PROCESS ACTIVITY, AUTOSCALED PROCESS ACTIVITY, PROCESS MODEL METRICS, RECORD RESPONSE TIMES, RECORD SYNC STATUS, QUERY PERFORMANCE (selected), and PORTAL MONITORING.

The main content area is titled 'Appian Keynote Environment' and features a 'Capture Query Performance' toggle switch, which is currently turned on. Below this, a descriptive text states: 'Enable to capture information about user-initiated queries to record types in your environment. In production environments, only enable this setting when you are actively troubleshooting. Queries issued from designer interfaces are always shown in this view.'

A table of query performance data is displayed, with columns for Query ID, Start Time, Execution Time (ms), Wait Time (ms), Started By, Evaluation ID, Interface, Expression Rule, Record Type, and Component. The table contains 15 rows of data, showing various queries with their respective execution and wait times, and the users who initiated them.

On the left side, there is a sidebar with several filter sections: Query ID, Query Start Time (Last 24 Hours), Query Execution Time, Query Wait Time, Started By (Select one or more users), Evaluation ID, Component (Select one or more components), Interface (Select one or more interfaces or rule), Expression Rule (Select one or more interfaces or rule), Record Type (Select one or more record types), and Error Code.

Query ID	Start Time	Execution Time (ms)	Wait Time (ms)	Started By	Evaluation ID	Interface	Expression Rule	Record Type	Component
1fe0533b-f679-4e...	7/22/2024 2:55 PM	353	0	kait.bonifaz	74327c3526690c0d27e097c328ab763d			Order Submission	Other Source
3cea3668-472e-40...	7/22/2024 2:46 PM	185	0	kait.bonifaz	0aa36a4afc1bfa2afb937ee78e2f2893			Order Submission	Other Source
6a951383-a65b-46...	7/22/2024 2:36 PM	195	0	kait.bonifaz	6ec789345386bde99f37f3649375fccb			Order Submission	Other Source
0c877e19-f7ca-45...	7/22/2024 2:31 PM	164	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95	OF_OrdersGrid	OF_OrdersGrid	Order Submission	gridField
a5cfe25-d2c1-48...	7/22/2024 2:31 PM	89	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95			Employee	queryRecord
a57f4909-bc60-47...	7/22/2024 2:31 PM	19	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95			Order Priority	queryRecord
4807f8c3-f513-4e...	7/22/2024 2:31 PM	275	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95			Order Submission	chartField
ad268c8a-eca0-4d...	7/22/2024 2:31 PM	35	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95			Order Status	queryRecord
79ccb12d-e6f8-40...	7/22/2024 2:31 PM	72	0	kait.bonifaz	c83d912f372d08817262ed45c9542d95	OF_HomeCalendar	OF_HomeCalendar	Order Submission	queryRecord
ff665746-9adf-43...	7/22/2024 2:31 PM	14	0	kait.bonifaz	65e7c5ea8a94bf3ac0ef90b534916ac			OF Campaign	gridField
a400e052-e9f2-4f...	7/22/2024 2:30 PM	15	0	kait.bonifaz	6ba94471db3132214a5fec0fa4bdcbe0	OF_CampaignDashboard	OF_CampaignDashboard	OF Campaign	gridField
f042a2de-90d5-4f...	7/22/2024 2:30 PM	36	0	kait.bonifaz	3cc851a142ad0dfe1cf92e0a2bfc328			OF Campaign	gridField
4a4410f5-c390-4b...	7/22/2024 2:30 PM	201	0	kait.bonifaz	521730dcd9a3399737add1725e7d11e6	OF_OrdersGrid	OF_OrdersGrid	Order Submission	gridField
90ca5f60-7eea-4d...	7/22/2024 2:30 PM	294	0	kait.bonifaz	521730dcd9a3399737add1725e7d11e6			Order Submission	chartField
dcbc64cc-23b9-4e...	7/22/2024 2:30 PM	39	0	kait.bonifaz	521730dcd9a3399737add1725e7d11e6			Employee	queryRecord
d574504a-e5ce-45...	7/22/2024 2:30 PM	11	0	kait.bonifaz	521730dcd9a3399737add1725e7d11e6			Order Priority	queryRecord

New Experience for Source Filters

Order Submission SAVE CHANGES SEARCH SETTINGS APPIAN

Edit Sync Filters

Determine which data is synced in this record type based on the specified conditions

Basic Expression

Ignore filters with empty values

ADD SOURCE FILTER

Field	Condition	Value	
ID	<	500002	123
COMPLETED_ON	Date Range	Trailing 18 Months	

AND

Sync filters successfully applied. After applying sync filters, there are 182,421 rows to sync in this record type. Since the number of rows is below the 4,000,000 row limit, all rows will be synced. TEST FILTER

Preview

ID	TYPE	RECONCILED	EXTRACTION_ID	STATUS_ID	PRIORITY_ID	OPPORTUNITY_ID	ASSIGNED_EMPLOYEE_ID	ORDER_DATE	CREATED_BY
Number (Integer)	Text	Boolean	Number (Integer)	Number (Integer)	Number (Integer)	Number (Integer)	Number (Integer)	Date	Text
2692	Purchase Order	false	2692	11	4	2692	4	12/21/2022	Olive S
2698	Purchase Order	true	2698	11	2	2698	1	12/23/2022	Lindsay
2701	Purchase Order	false	2701	11	3	2701	2	12/24/2022	Corny

SOURCE +

Type Database

Table ORDER_SUBMISSION_FINAL

SYNC FILTERS EDIT FILTERS

RELATIONSHIPS ADD RELATIONSHIP

- campaign + + +
- documentDetail + + +
- documentDetail2 + + +
- employee + + +
- eventHistory + + +
- orderDetail + + +
- orderPriority + + +
- orderStatus + + +
- salesforceOpportunity + + +

Suggested Relationships

Click Add All to add relationships with the following record types:

- Message Thread
- Campaign
- User modifiedBy

Reorder Record-level Security Rules

The screenshot shows the Appian interface for configuring record-level security for the 'Order Submission' object. The top navigation bar includes 'SAVE CHANGES', search, settings, and user profile icons, along with the Appian logo. A left sidebar contains navigation options: DATA (Data Model, Data Preview, Events, Sync Options), USER EXPERIENCE (List, Filters, Views, Actions, Workspaces), SECURITY (Record-Level Security, Views and Actions Security), and MONITORING (Performance, Sync History). The main content area is titled 'Record-Level Security' and includes a 'NEW SECURITY RULE' button. Below this, a note states: 'If a user belongs to multiple security rules, then they can see the total set of records defined by those rules.' Three security rules are listed, each with a 'Members' section (containing a toggle and 'Users found in:' field) and a 'Security Conditions' section (containing a toggle, edit, and delete icon, and a text field for conditions). The first rule has 'Members' turned on and 'Users found in:' set to 'OF Returns Team', with 'Security Conditions' set to 'Users can see all Order Submissions'. The second rule has 'Members' turned on and 'Users found in:' set to 'OF Returns Team', with 'Security Conditions' set to 'Users can see all Order Submissions WHERE orderStatus.value = Returned AND completedOn is null'. The third rule has 'Members' turned on and 'Users found in:' set to 'modifiedBy completedBy employee.username', with 'Security Conditions' set to 'Users can see Order Submissions where they are found in the selected fields'. On the right, a 'Test Security Rules' section features a 'User' dropdown menu with the placeholder 'Select a user' and a 'TEST' button, and a preview area with a lock icon and the text 'Select a user and click "Test" to preview records for the selected user'.

Automation

Jupiter Muñoz | Distinguished Product Manager



AI-Copilot for Business Users

[Preview] AI Copilot for Data Fabric



The screenshot displays the Appian Data Catalog interface. At the top left, the Appian logo is visible. The main header reads "Data Catalog" with a subtitle: "Build custom reports by selecting a dataset or using autocomplete to guide you in picking the fields in a report". Below this, there are tabs for "DATASETS" and "GUIDED EXPERIENCE". A search bar is present with the placeholder text "Search dataset names or descriptions". To the right of the search bar are dropdown menus for "SOURCE TYPE" and "SOURCE NAME", and a "SORT BY" dropdown set to "NAME (A TO Z)".

The main content area is a grid of dataset cards. Each card includes an icon, a title, and a summary of rows and sources. The cards are:

- Case Category Details (100 rows - 6 total sources)
- Case Entities (301 rows - 5 total sources)
- Case Event History (4.9K rows - 4 total sources)
- Case Milestones (401 rows - 3 total sources)
- Case Priorities (5 rows - 2 total sources)
- Case Tasks (1.4K rows - 6 total sources)
- Case to EntityMappings (1.1K rows - 5 total sources)
- Case to Tag Mappings (93 rows - 4 total sources)
- Case Type Details (~ rows - 6 total sources)
- Case Types (18 rows - 4 total sources)
- Comment to DocumentMappings (763 rows - 3 total sources)
- Comment User Tags (4.8K rows - 3 total sources)
- Comments (15.8K rows - 5 total sources)
- Configuration Electrical Equipments (~ rows - 3 total sources)
- Configuration Service Panel Generators (~ rows - 3 total sources)
- Configuration Units (~ rows - 2 total sources)
- Countries (195 rows - 2 total sources)
- Document Types (5 rows - 2 total sources)

At the bottom of the grid, there is a pagination control showing "1 - 18 of 53".

On the right side of the interface, there is an "AI Copilot" chat window. It contains a question: "Which case types have the longest average duration?". The response is as follows:

Based on the data, the case types with the longest average durations are:

1. Plumbing - 111 days
2. Electrical - 110.5 days
3. Mechanical - 110 days
4. Pool - 109 days
5. Solar - 109 days

The Commercial and Residential case types did not have any average duration values provided.

I determined the answer to the question by querying the Case Types record, grouping the results by the Case Type Name field and calculating the average of the Case Due Days field for each group. The results were then sorted in descending order by the average duration, allowing me to identify the case types with the longest average durations at the top of the list.

At the bottom of the chat window, there is a text input field with the placeholder "Ask a question about your data" and a "Review AI-generated content to make sure it is accurate and appropriate. Learn more about AI Copilot" link.

Demo

Find Answers Across All Knowledge Sets

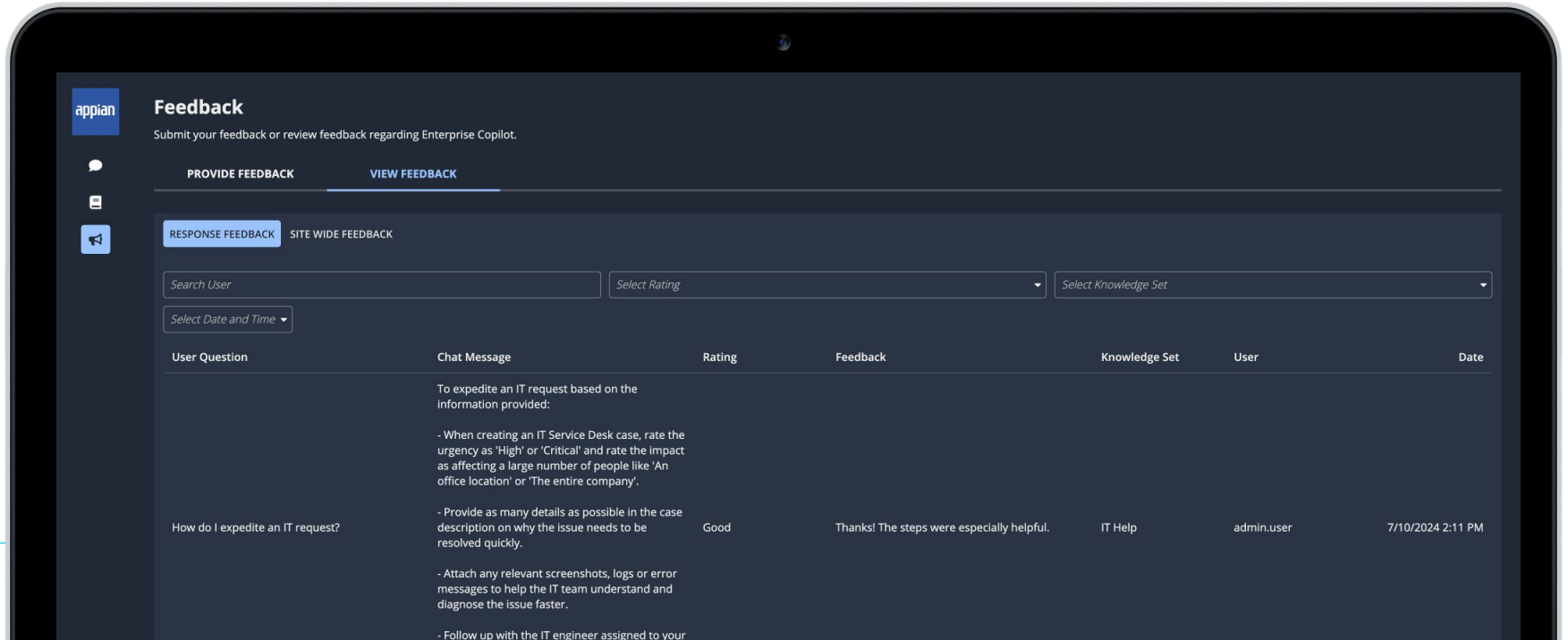


The screenshot displays the Appian AI Copilot interface. On the left, a sidebar lists various knowledge sets: All Knowledge Sets, Handbook, Benefits, IT Help, Solution Engineering VPN, RFPs, Regulations Documents, Customer Webinars, Earnings Calls, Sales Playbooks, and Star Wars Set. The main chat area is titled 'Chatting about: All Knowledge Sets'. A user question is 'What is CFR 1.100?'. The AI response provides a definition and context for CFR 1.100, including a citation to a document titled 'CFR-2024-title2-vol1' (Regulations Documents, pdf - 4.25 MB). The response text is: '- CFR 1.100 refers to title 2, part 1, section 100 of the Code of Federal Regulations. - The Code of Federal Regulations is a codification of the general and permanent rules published in the Federal Register by the Executive departments and agencies of the Federal Government. - Titles in the CFR represent broad areas subject to Federal regulation. Each title is divided into chapters which usually bear the name of the issuing agency. Each chapter is further sub-divided into parts covering specific regulatory areas. cite the regulations in this volume use title, part and section number. Thus, 2 CFR 1.100 refers to title 2, part 1, section 100.'

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

Use Feedback to Drive Enterprise Copilot

Users can now provide **feedback** on specific knowledge sets, the overall experience, and even rate responses as good or bad.



The screenshot displays the Appian Feedback interface. At the top left is the Appian logo. The main heading is "Feedback" with a subtext: "Submit your feedback or review feedback regarding Enterprise Copilot." Below this are two tabs: "PROVIDE FEEDBACK" and "VIEW FEEDBACK". Under "VIEW FEEDBACK", there are two sub-tabs: "RESPONSE FEEDBACK" (which is active) and "SITE WIDE FEEDBACK". The interface includes search and filter fields: "Search User", "Select Rating", "Select Knowledge Set", and "Select Date and Time". Below these fields is a table of feedback entries.

User Question	Chat Message	Rating	Feedback	Knowledge Set	User	Date
How do I expedite an IT request?	<p>To expedite an IT request based on the information provided:</p> <ul style="list-style-type: none">- When creating an IT Service Desk case, rate the urgency as 'High' or 'Critical' and rate the impact as affecting a large number of people like 'An office location' or 'The entire company'.- Provide as many details as possible in the case description on why the issue needs to be resolved quickly.- Attach any relevant screenshots, logs or error messages to help the IT team understand and diagnose the issue faster.- Follow up with the IT engineer assigned to your	Good	Thanks! The steps were especially helpful.	IT Help	admin.user	7/10/2024 2:11 PM

Real-Time, Faster Report Chats



appian

Orders by Vendor

CLOSE

Quarter	Pickup	Pioneer Solutions	TransGlobal Connect	Velocity Freight
2020 Q3	1,866	3,335	6,176	6,566
2020 Q4	3,335	6,149	8,827	16,081
2021 Q1	3,079	3,650	7,922	13,972
2021 Q2	3,650	7,039	8,290	16,919
2021 Q3	3,960	4,063	6,048	15,160
2021 Q4	4,545	3,077	7,213	13,098
2022 Q1	3,379	8,600	8,415	14,145
2022 Q2	3,261	7,044	6,156	13,559
2022 Q3	2,774	7,612	8,905	14,647
2022 Q4	3,168	8,610	7,044	13,957
2023 Q1	2,973	6,056	7,994	13,776
2023 Q2	3,558	4,050	9,050	16,975
2023 Q3	2,481	5,746	4,577	10,569
2023 Q4	4,050	2,481	5,746	14,628
2024 Q1	38	38	38	14,242
2024 Q2	38	38	38	9,050
2024 Q3	38	38	38	38

Id	Order Date	Quarter	Year	Order Detail	Shipping Vendor
GROUP	GROUP	GROUP	GROUP	GROUP	GROUP
1666	2020	Q3		Pickup	
2548	2020	Q3		Pioneer Solutions	
2646	2020	Q3		TransGlobal Connect	
6566	2020	Q3		Velocity Freight	
3335	2020	Q4		Pickup	
6176	2020	Q4		Pioneer Solutions	
8827	2020	Q4		TransGlobal Connect	
16081	2020	Q4		Velocity Freight	
3079	2021	Q1		Pickup	
6149	2021	Q1		Pioneer Solutions	
7922	2021	Q1		TransGlobal Connect	
13098	2021	Q1		Velocity Freight	

AI COPILOT

✖

AI Copilot can help you analyze your report and suggest business insights. Select one of the suggested questions to get started, or ask your own question below.

What are two insights and actions I can take based on this report?

Here are two insights I generated from the report along with suggested actions:

Insight 1: Orders from the Pioneer Solutions shipping vendor have consistently remained in the top two vendors by number of orders each quarter over the past few years, ranging between 25-30% of total orders. This suggests Pioneer Solutions is a reliable partner that can likely handle increased order volumes. An action to consider would be expanding your use of Pioneer Solutions to ship additional types or higher volumes of products.

Insight 2: The number of orders shipped via pickup has declined slightly each year over the past few years, dropping from approximately 15-20% of orders to 10-15% currently. This may indicate customers are preferring delivery over pickup. An action would be to survey pickup customers to better understand their needs and preferences to see if offering new shipping options could help increase the use of pickup orders again.

What else would you like to know about your report?

What are areas for improvement?

New Regions: GenAI Skills / Enterprise Copilot



Region	NEW Availability
Canada (ca-central-1)	NEW: GenAI Skills
Ireland (eu-west-1)	NEW: GenAI Skills
London (eu-west-2)	NEW: GenAI Skills
Sao Paulo (sa-east-1)	NEW: GenAI Skills
Mumbai (ap-south-1)	NEW: GenAI Skills
Europe (Frankfurt) (eu-central-1)	NEW: Enterprise Copilot

Multiple AI Features HITRUST Certified

AI Skills, AI Copilot for business users, and AI Copilot for developers are all now HITRUST certified.

HITRUST is a security framework that provides a standardized approach to managing risk and protecting sensitive information, and **complying with HIPAA.**

HITRUST[®]

Robotic Process Automation (RPA)

Manage Version History for Robotic Tasks

The screenshot shows the Appian interface for managing a robotic task named 'RW_GetDirections'. The 'Versions' dialog is open, displaying a table of version history. The table has the following columns: Version, Name, Description, and Created. The data is as follows:

Version	Name	Description	Created
Latest	RW_GetDirections	Robotic task that gets directions from one location to ano...	7/24/2024 12:35 PM by Ella Schneider
4	RW_GetDirections	Robotic task that gets directions from one location to ano...	7/24/2024 12:34 PM by Ella Schneider
3	RW_GetDirections	Robotic task that gets directions from one location to ano...	7/24/2024 12:34 PM by Ella Schneider
2	RW_GetDirections	Robotic task that gets directions from one location to ano...	7/24/2024 10:58 AM by Appian Administrator
1	RW_GetDirections	Robotic task that gets directions from one location to ano...	7/24/2024 10:58 AM by Appian Administrator

The dialog also shows a 'Created By' field with a dropdown menu, and 'From' and 'To' date pickers. A 'Clear Filters' button is located to the right of the date pickers. The 'Variables' panel on the right side of the interface shows the following variables:

Name	Parameter	Multiple
destinationAddress		
originAddress	✓	
destination	✓	
apsTabTitle		

Boost Performance for Faster Automation



SPEED UP!

Our improvements reduce the time it takes for a robotic task to complete by **15% or more**, enhancing the efficiency of task assignment, enabling more robots to work simultaneously and better utilize available robot capacity.

RPA: Java 17 Is Here!

Beginning with RPA 9.12, agents now require the use of Java 17. To ensure RPA continues to operate smoothly, **upgrade to Java 17 immediately**, if you have not already.



Process HQ

Alex LaDue | Sr Product Manager II

Process Insights

Curate and Prepare Your Process Data

All in one **centralized** place. We've added filtering to processes to help you **customize** case and event data **directly** from process insights.

The screenshot displays the 'Add Process' interface. On the left, a sidebar lists 'Select a Case Record Type' with options like 'OF Campaign Event History', 'Id', 'Record Id', 'Event Type Id', 'User', 'Automation Type Id', 'Comment', and 'Timestamp'. Below this, 'Event Type' is selected, showing 'Id' and 'Event Name'. The main area is titled 'Add Filters' and contains a dialog for configuring filters. The dialog shows two filters: 'Event Type Event Name' set to 'Equals' with the value 'Added a Comment', and 'Timestamp' set to 'Is between' with values '01/01/202 12:00 AM' and '07/01/202 12:00 AM'. Below the filter configuration is a table of process data.

Id	Record Id	Event Type Id	User	Automation Type Id	Comment	Timestamp	Event Name	
4	1	3	aidan.reilly	1 (None (User))	Who wants to lead the discussion on targ...	1/4/2024 1:34 PM EST	3	Created Campaign
5	1	6	annelise.dubrovsky	1 (None (User))		1/8/2024 2:09 PM EST	6	Initiated Planning
6	1	7	sam.knecht@appian.com	1 (None (User))	Could someone take a look at the draft of...	1/28/2024 1:06 PM EST	7	Identified the Target Audience
7	1	3	elizabeth.barbieto	1 (None (User))	The visuals for the social media posts loo...	2/15/2024 2:04 PM EST	3	Added a Comment
8	1	8	aidan.reilly	1 (None (User))		2/23/2024 2:01 PM EST	8	Developed Content
9	1	9	jacob.rank@appian.com	1 (None (User))		3/21/2024 3:56 PM EDT	9	Developed Design
10	1	3	jacob.rank@appian.com	1 (None (User))	Our campaign launched yesterday. How ...	3/22/2024 4:37 PM EDT	3	Launched the Campaign
11	1	10	malcolm.ross@appian.com	1 (None (User))	<p>The budget set for this campaign nee...	4/4/2024 5:15 PM EDT	10	Added a Comment

New Find and Replace Custom Attribute

Data stewards can **refine** and **standardize** the names of activities in a process using the new **Find and Replace** custom attribute template.

The screenshot displays the 'Configure Event Data' interface. At the top, there are navigation tabs: 'Select a Case Record Type', 'Select an Event History Record Type', 'Configure Case Data', 'Configure Event Data', and 'Configure Process Properties'. Below these, a breadcrumb trail shows 'OF Campaign Event History' and '123 Id'. The main heading is 'Configure Event Data' with a subtext: 'Select which fields you want to analyze as attributes of this process. You can also create custom attributes to refine your data.'

Create Custom Attribute

CONFIGURE VALUES

Find and Replace Values in *
Event Type Event Name x

Find	Replace With	Exact Match	
Initiated Planning	Initiated Campaign Plan	<input type="checkbox"/> Exact Match	x
Developed Design	Developed Campaign Designs	<input type="checkbox"/> Exact Match	x
Gathered Feedback	Gathered Qualitative Data	<input type="checkbox"/> Exact Match	x
Set Objectives	Set OKR	<input type="checkbox"/> Exact Match	x
Added a comment	Commented	<input type="checkbox"/> Exact Match	x
Launched the Campaign	Launched Campaign	<input type="checkbox"/> Exact Match	x

+ Add Row

TEST TEST

Original unique values count: 12 • New unique values count: 12

Id	Event Type Event Name	Custom Attribute
1	Created Campaign	Created Campaign
2	Initiated Planning	Initiated Campaign Plan
3	Identified the Target Audience	Identified the Target Audience
4	Added a Comment	Commented
5	Set Objectives	Set OKR
6	Developed Content	Developed Content
7	Added a Comment	Commented
8	Developed Design	Developed Campaign Designs
9	Launched the Campaign	Launched Campaign

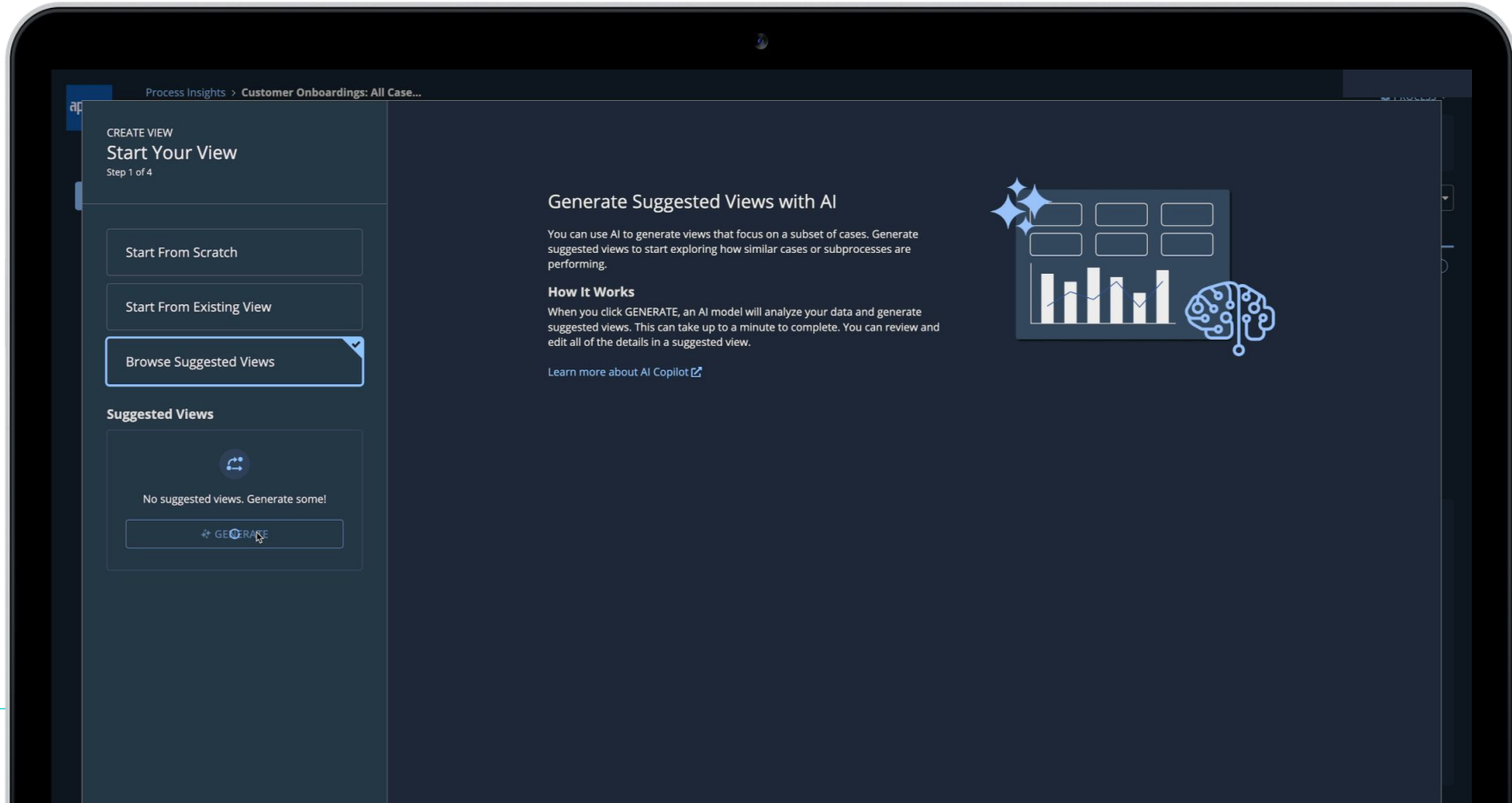
Preview Data in the Data Governance Page

The screenshot displays the Apian Data Governance interface for a dataset named 'SKS Support Ticket'. The interface includes a navigation sidebar on the left with icons for home, refresh, menu, and a dropdown arrow. The main header shows the dataset name and several status indicators: 'Source SKS Support Ticket (Apian)', 'Record Events Configured', 'Data Catalog Not Shown', and 'Last Full Sync May 6, 2024 10:48 AM'. Below the header, there are tabs for 'DATA STRUCTURE', 'DATA PREVIEW' (which is active), 'SECURITY', and 'DEPENDENTS'. The 'DATA PREVIEW' tab shows a table of 15 rows of data, with a note indicating that up to 60 rows are available from the source. The table columns are: id, customerRegion, customerCountry, source, orderSize, priority, customerType, csat, price, and shippingVendor.

id	customerRegion	customerCountry	source	orderSize	priority	customerType	csat	price	shippingVendor
1	US	Mexico	Direct	Small	Medium	Government	53	1475	Velocity Freight
2	APAC	France	Reseller	Medium	Medium	Government	51	6386	Velocity Freight
3	LATAM	Portugal	Reseller	Large	High	Institutional	85	6304	Velocity Freight
4	US	Egypt	Reseller	Large	Medium	Institutional	94	2539	TransGlobal Connect
5	US	Mexico	Direct	Large	Low	Government	97	4910	TransGlobal Connect
6	LATAM	Egypt	Direct	Small	Medium	Government	92	9896	Velocity Freight
7	EMEA	South Africa	Reseller	Large	Medium	Government	86	1182	TransGlobal Connect
8	EMEA	Mexico	Direct	Medium	High	Government	59	9607	Velocity Freight
9	US	Egypt	Direct	Large	Urgent	Commercial	87	3063	TransGlobal Connect
10	APAC	Egypt	Reseller	Large	Medium	Commercial	86	747	Velocity Freight
11	EMEA	Spain	Direct	Medium	Low	Commercial	88	4343	Pioneer Solutions
12	LATAM	Portugal	Reseller	Small	High	Commercial	94	3518	Pioneer Solutions
13	APAC	US	Reseller	Large	Medium	Institutional	84	901	TransGlobal Connect
14	APAC	Mexico	Direct	Small	High	Commercial	63	2022	Velocity Freight
15	APAC	Mexico	Reseller	Medium	High	Commercial	77	2945	TransGlobal Connect

Demo

Jump-Start View Creation with AI Suggestions



CREATE VIEW
Start Your View
Step 1 of 4

Start From Scratch

Start From Existing View

Browse Suggested Views

Suggested Views



No suggested views. Generate some!

⚡ GENERATE

Generate Suggested Views with AI

You can use AI to generate views that focus on a subset of cases. Generate suggested views to start exploring how similar cases or subprocesses are performing.

How It Works

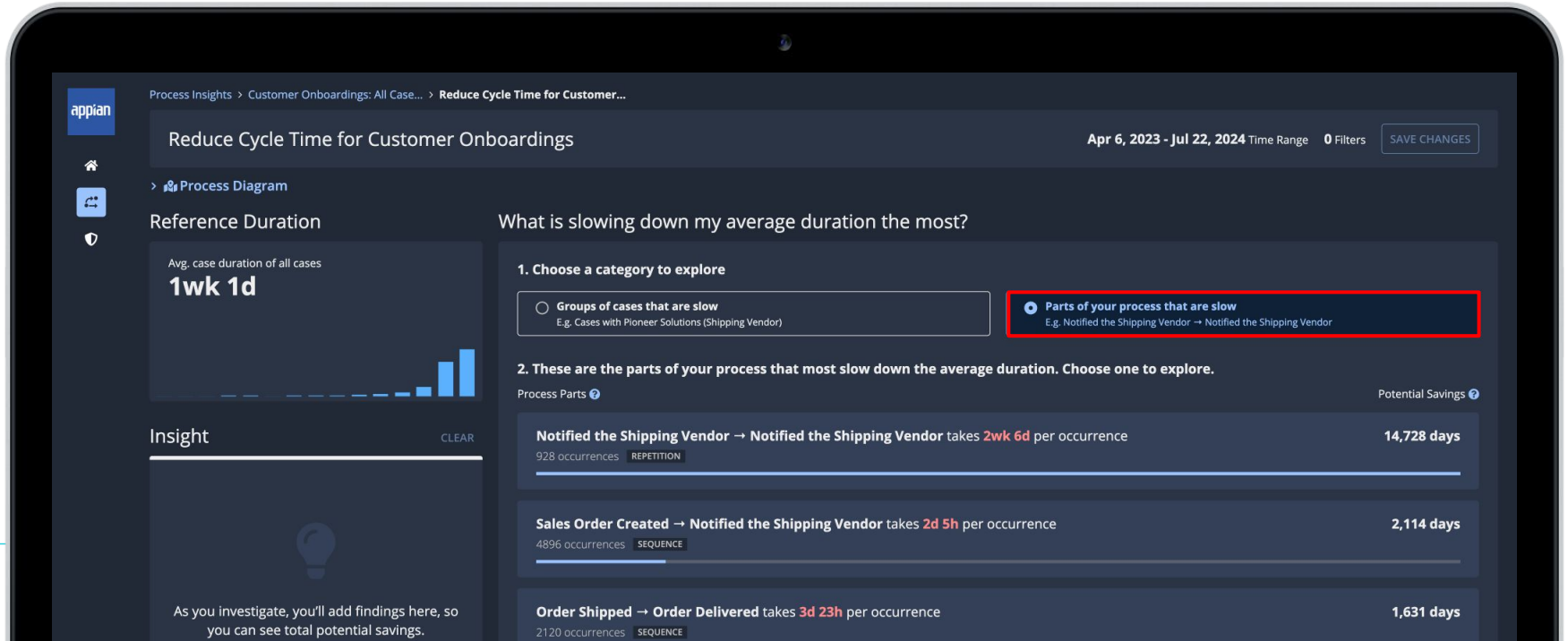
When you click GENERATE, an AI model will analyze your data and generate suggested views. This can take up to a minute to complete. You can review and edit all of the details in a suggested view.

[Learn more about AI Copilot](#)



Investigate What's Slowing Your Process down

Now, you can explore **activity duration** as another dimension of an investigation. Look closely at **how long** each activity is taking and **why**.

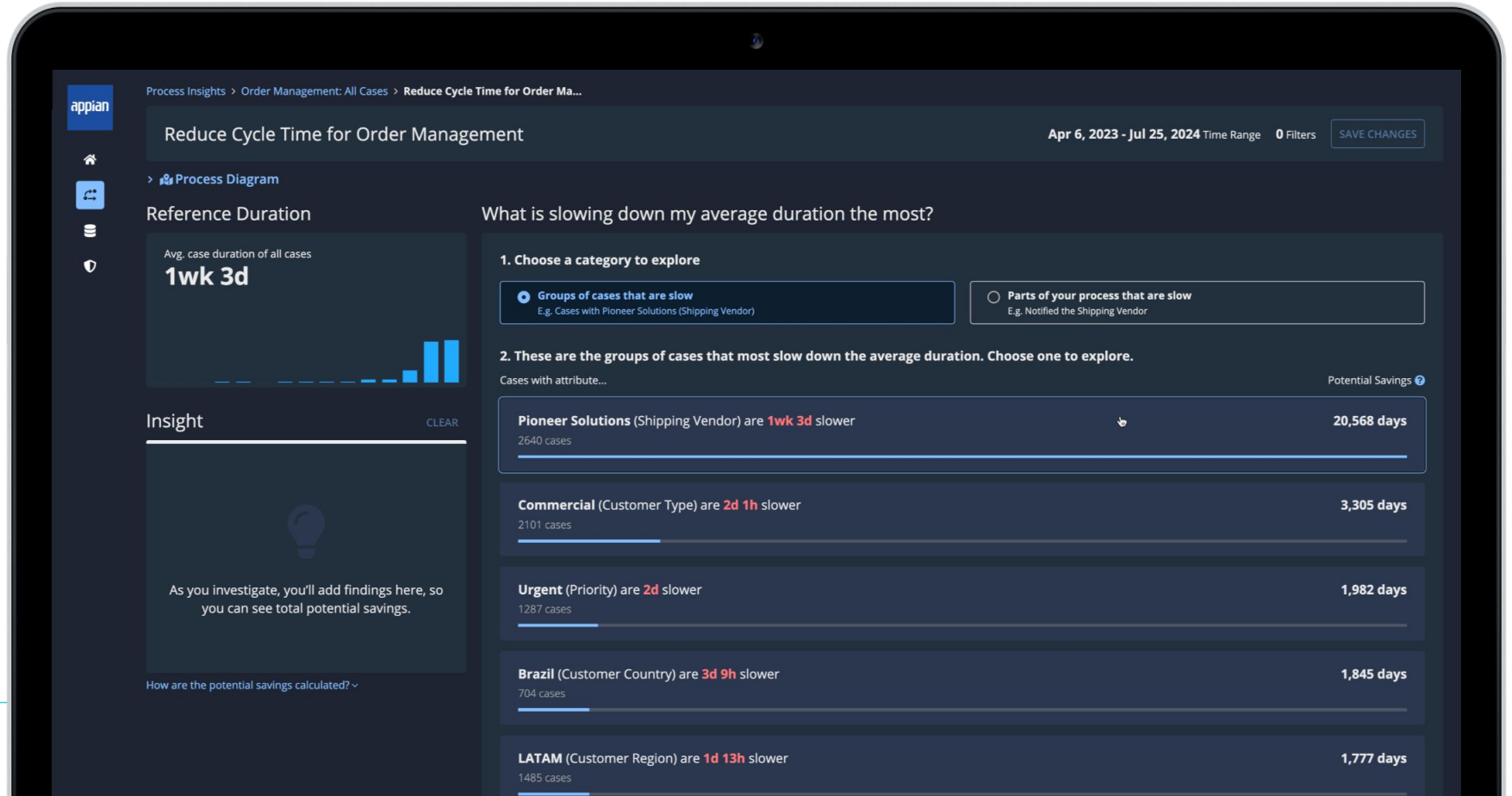


The screenshot displays the Appian Process Insights interface for a process titled "Reduce Cycle Time for Customer Onboardings". The interface is dark-themed and includes a navigation sidebar on the left with the Appian logo and icons for home, refresh, and help. The main content area is divided into several sections:

- Header:** "Process Insights > Customer Onboardings: All Case... > Reduce Cycle Time for Customer..."
- Process Title:** "Reduce Cycle Time for Customer Onboardings" with a time range of "Apr 6, 2023 - Jul 22, 2024" and "0 Filters". A "SAVE CHANGES" button is visible.
- Reference Duration:** "Avg. case duration of all cases" is displayed as "1wk 1d".
- Insight:** A section with a lightbulb icon and the text: "As you investigate, you'll add findings here, so you can see total potential savings."
- Process Diagram:** A section titled "What is slowing down my average duration the most?" with two main steps:
 - 1. Choose a category to explore:** Two radio button options are shown:
 - Groups of cases that are slow (E.g. Cases with Pioneer Solutions (Shipping Vendor))
 - Parts of your process that are slow (E.g. Notified the Shipping Vendor → Notified the Shipping Vendor)
 - 2. These are the parts of your process that most slow down the average duration. Choose one to explore.**
- Process Parts Table:** A table listing process parts with their durations and potential savings. The "Notified the Shipping Vendor" part is highlighted with a red box.

Process Part	Potential Savings
Notified the Shipping Vendor → Notified the Shipping Vendor takes 2wk 6d per occurrence 928 occurrences REPETITION	14,728 days
Sales Order Created → Notified the Shipping Vendor takes 2d 5h per occurrence 4896 occurrences SEQUENCE	2,114 days
Order Shipped → Order Delivered takes 3d 23h per occurrence 2120 occurrences SEQUENCE	1,631 days

Streamlined Investigation Flow

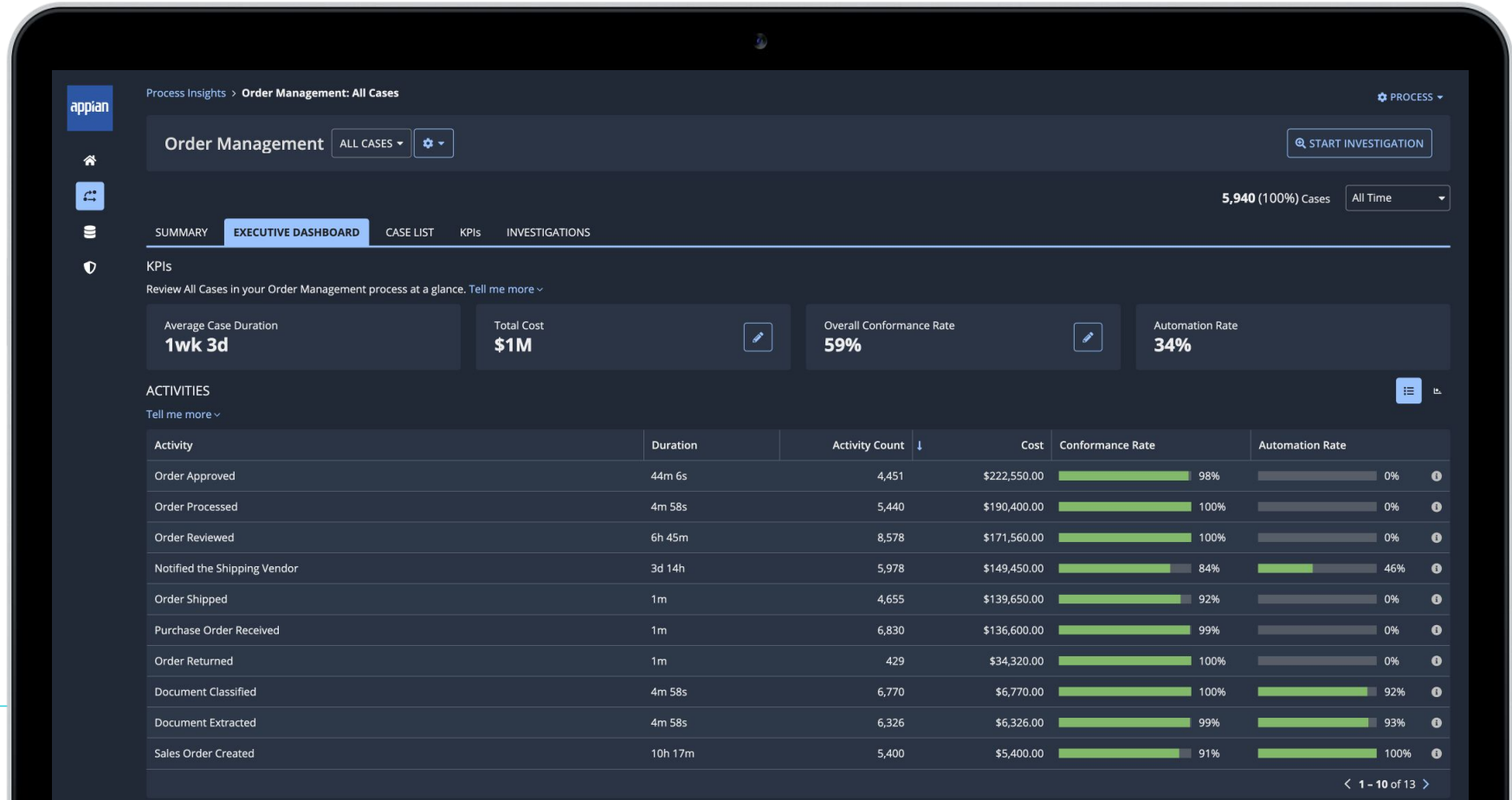


Drill Down Quickly with the Searchable Case List

The screenshot displays the Appian interface for 'Order Management: All Cases'. The top navigation bar includes the Appian logo, 'Process Insights > Order Management: All Cases', and a 'PROCESS' dropdown. Below this, the 'Order Management' section features a filter for 'ALL CASES', a settings gear, and a 'START INVESTIGATION' button. A summary bar indicates '5,940 (100%) Cases' and 'All Time'. The main content area has tabs for 'SUMMARY', 'EXECUTIVE DASHBOARD', 'CASE LIST' (selected), 'KPIs', and 'INVESTIGATIONS'. A search bar with the number '43' is positioned above the table. The table itself has 15 columns: Case ID, Start, End, Duration, Total Activity Duration, Total Sequence Duration, Csat, Customer Country, Customer Region, Customer Type, Order Size, Price, Priority, Shipping Vendor, and Source. The table lists 20 case entries with their respective details.

Case ID	Start	End	Duration	Total Activity Duration	Total Sequence Duration	Csat	Customer Country	Customer Region	Customer Type	Order Size	Price	Priority	Shipping Vendor	Source
43	Mar 28, 2024 11:45 AM	Apr 1, 2024 10:50 AM	3d 23h	1h 39m	3d 21h	86.0	Germany	LATAM	Institutional	Large	1594.0	High	Velocity Freight	Reseller
143	Feb 24, 2024 6:54 AM	Feb 28, 2024 2:46 PM	4d 7h	1h 32m	4d 6h	76.0	Germany	LATAM	Government	Large	4430.0	Low	Velocity Freight	Direct
243	Dec 17, 2023 3:40 PM	Dec 22, 2023 3:13 AM	4d 11h	1h 33m	4d 10h	73.0	Italy	APAC	Government	Medium	4245.0	Medium	TransGlobal Connect	Reseller
343	Sep 4, 2023 2:03 PM	Sep 9, 2023 1:22 AM	4d 11h	1h 9m	4d 10h	95.0	UK	US	Government	Large	6653.0	Medium	Velocity Freight	Reseller
430	May 8, 2023 2:01 AM	May 12, 2023 4:01 PM	4d 14h	1h 45m	4d 12h	76.0	Mexico	EMEA	Commercial	Medium	7911.0	High	Pioneer Solutions	Reseller
431	May 6, 2023 1:18 PM	May 11, 2023 4:53 AM	4d 15h	2h 2m	4d 13h	62.0	France	US	Government	Small	8748.0	High	Pioneer Solutions	Direct
432	May 5, 2023 12:30 AM	May 8, 2023 4:08 PM	3d 15h	2h 4m	3d 13h	86.0	Spain	LATAM	Institutional	Medium	7532.0	Medium	TransGlobal Connect	Direct
433	May 3, 2023 11:37 AM	May 8, 2023 12:28 AM	4d 12h	1h 12m	4d 11h	54.0	Mexico	EMEA	Government	Medium	7537.0	Medium	Pioneer Solutions	Direct
434	May 1, 2023 10:38 PM	May 5, 2023 10:08 PM	3d 23h	1h 35m	3d 21h	75.0	Brazil	US	Government	Medium	4588.0	Medium	Pioneer Solutions	Direct
435	Apr 30, 2023 9:35 AM	May 4, 2023 10:16 AM	4d	1h 23m	3d 23h	88.0	France	EMEA	Commercial	Small	9012.0	Low	TransGlobal Connect	Direct
436	Apr 28, 2023 8:26 PM	May 3, 2023 10:33 AM	4d 14h	1h 48m	4d 12h	75.0	Portugal	EMEA	Commercial	Large	6910.0	Medium	Velocity Freight	Reseller
437	Apr 27, 2023 7:13 AM	May 1, 2023 8:03 AM	4d	1h 43m	3d 23h	99.0	Italy	EMEA	Institutional	Small	8240.0	Urgent	Velocity Freight	Direct
438	Apr 25, 2023 5:54 PM	Apr 30, 2023 7:23 AM	4d 13h	1h 33m	4d 11h	55.0	France	US	Institutional	Large	6394.0	Low	Pioneer Solutions	Reseller
439	Apr 24, 2023 4:30 AM	Apr 28, 2023 3:06 AM	3d 22h	1h 21m	3d 21h	51.0	Italy	APAC	Institutional	Medium	9244.0	Medium	Pioneer Solutions	Direct
443	Apr 17, 2023 10:03 PM	Apr 22, 2023 8:38 AM	4d 10h	30m	4d 10h	69.0	Mexico	LATAM	Institutional	Medium	7851.0	Urgent	Pioneer Solutions	Reseller
543	Mar 31, 2024 7:01 PM	Mar 31, 2024 10:36 PM	3h 35m	1h 32m	2h 3m	85.0	Portugal	LATAM	Institutional	Large	6304.0	High	Velocity Freight	Reseller
643	Mar 12, 2024 9:08 PM	Mar 12, 2024 10:10 PM	1h 2m	1h 2m	0s	56.0	France	EMEA	Commercial	Large	3966.0	Medium	Pioneer Solutions	Reseller
743	Jan 18, 2024 8:51 AM	Jan 18, 2024 12:13 PM	3h 22m	1h 36m	1h 46m	60.0	France	US	Government	Medium	4428.0	High	Velocity Freight	Reseller
843	Oct 20, 2023 12:11 PM	Oct 20, 2023 3:24 PM	3h 13m	1h 16m	1h 57m	59.0	Brazil	US	Government	Large	8081.0	Low	Pioneer Solutions	Reseller
943	Jun 17, 2023 1:08 AM	Jun 20, 2023 3:51 PM	3d 14h	1h 10m	3d 13h	93.0	France	APAC	Commercial	Small	9839.0	High	Pioneer Solutions	Reseller

Track Conformance in the Executive Dashboard



Get Started with Enhanced Collaboration

The screenshot displays the Apian Order Management interface for a LATAM investigation case. The breadcrumb trail is: Process Insights > Order Management: All Cases > LATAM Investigation > LATAM Pioneer Solutions Repeat... The page title is "Order Management LATAM investigation" with a time range of "Apr 6, 2023 - May 29, 2024" and 0 filters. The case name is "LATAM Pioneer Solutions Repeat Work".

The interface is divided into several sections:

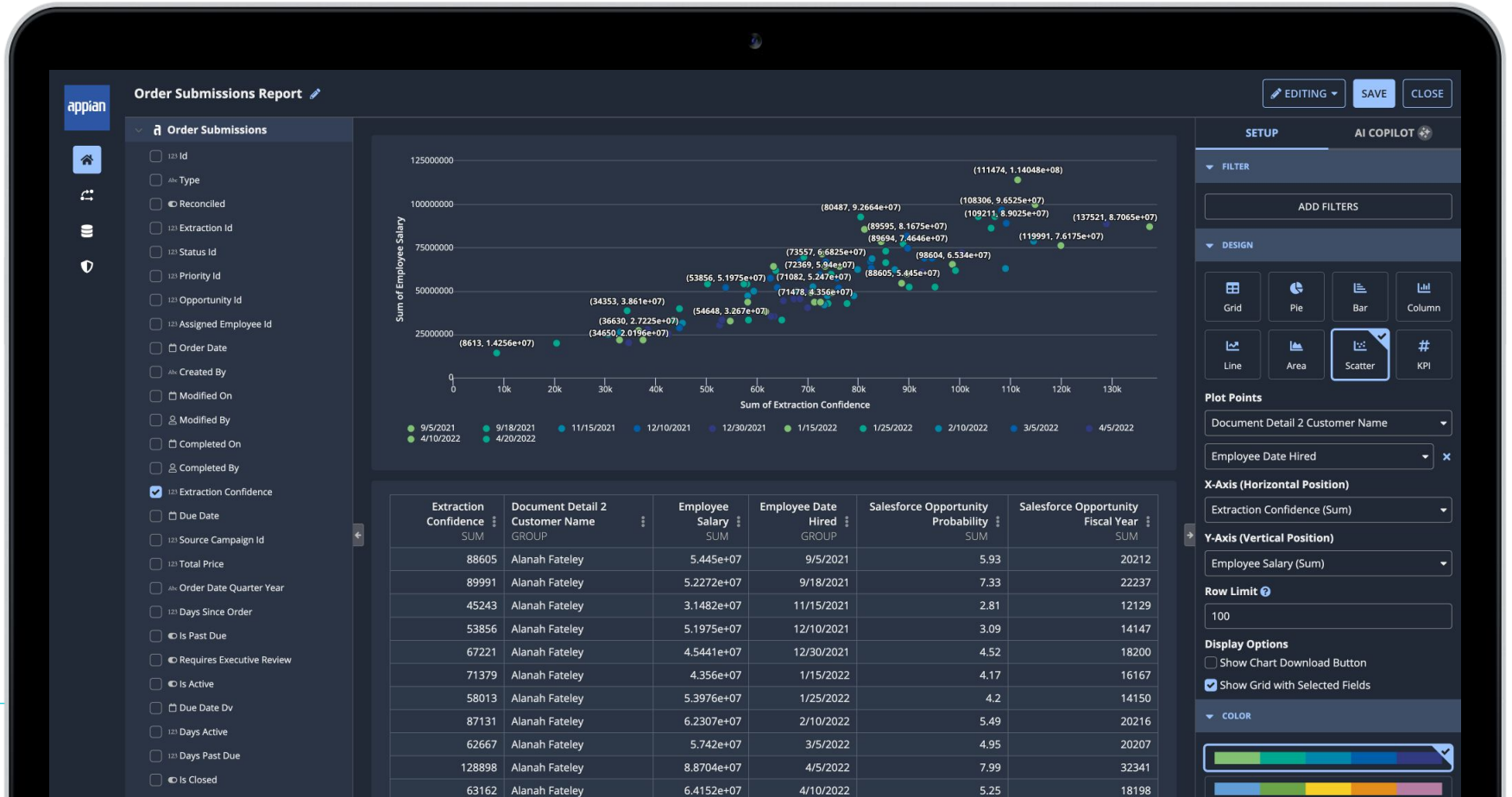
- Summary:** Includes tabs for SUMMARY, PROCESS DIAGRAM, DURATION COMPARISON, DURATION DISTRIBUTION, DURATION TREND, and CASE LIST.
- Insight:** Contains a "Findings" section with one finding: "Direct repetition Notified the Shipping Vendor takes 1wk 2d per occurrence". It also features a "Potential Savings" section showing a circular gauge for "2K days" and text stating: "Eliminating 100% of the occurrences of repetition Notified the Shipping Vendor in cases with attribute LATAM (Customer Region) in the investigation with attribute Pioneer Solutions (Shipping Vendor) could lead to annual savings of 2035 days". A link "How are the potential savings calculated?" is provided.
- Metrics:** Displays three key metrics: 244 Cases, 244 Occurrences, and 1wk 2d Duration (Average).
- Description:** A text block explaining the investigation's focus on identifying and eliminating inefficiencies in the LATAM order flow.
- Comments:** A section for user feedback, containing two comments from Lisa Chan and Ella Schneider.

The comments section is highlighted with a red border and includes a rich text editor with options for bold, italic, underline, link, and list. The first comment is from Lisa Chan (LC) on Jul 22, 2024 at 2:17 PM, stating: "Thanks Ella. I've set up the meeting with the LATAM AEs, and am currently in process of setting a time with our PoC at Pioneer Solutions." The second comment is from Ella Schneider (ES) on Jul 22, 2024 at 2:13 PM, detailing "Next Steps":

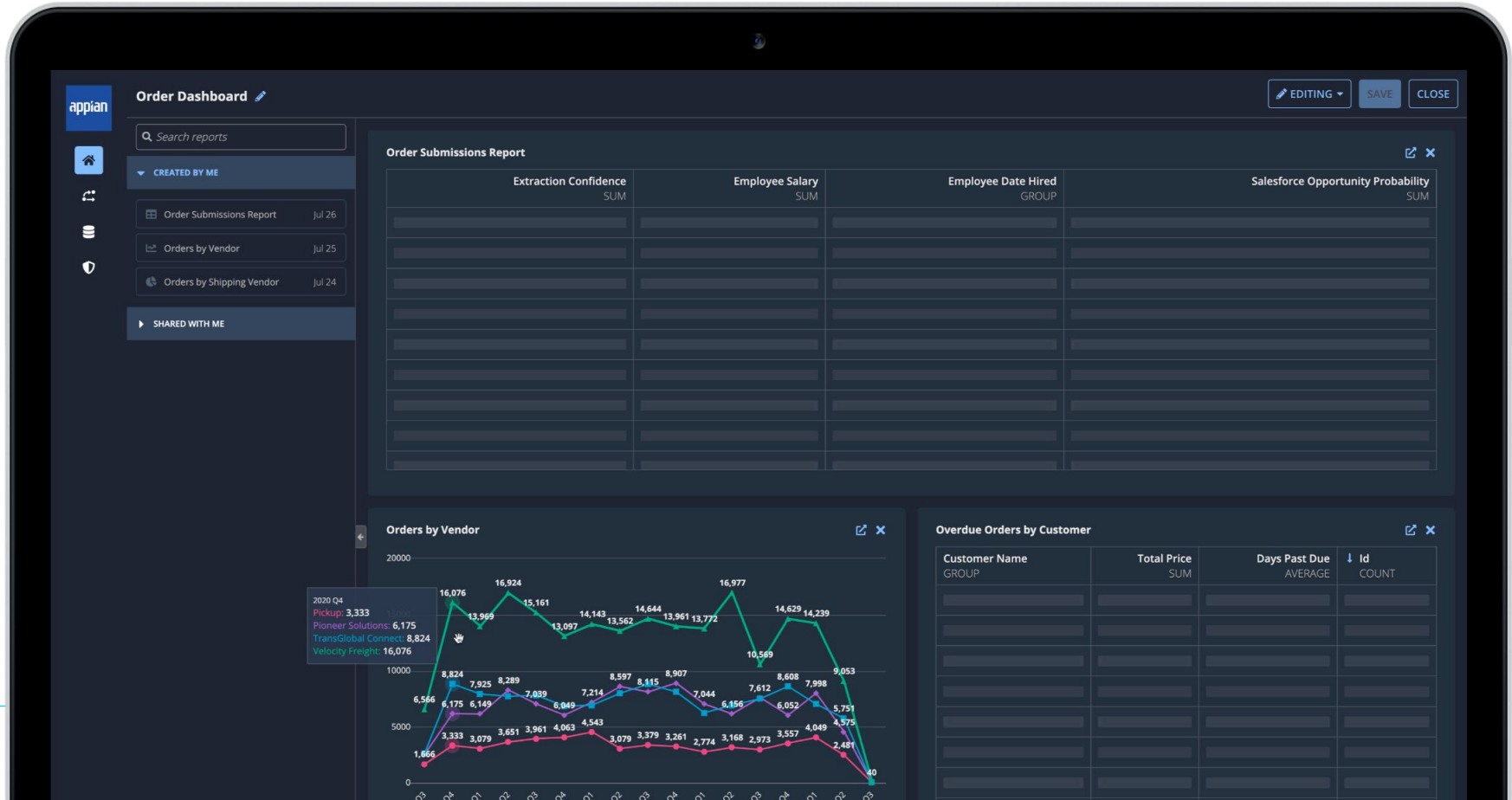
- Reach out to Shipping Vendor: Pioneer Solutions - meet with stakeholders to reduce shipping time
- LATAM customer region is slower. Work with LATAM account managers to optimize workflow processes.

Data Fabric Insights

Build Data Rich Scatter Charts



Improved Experience for Dashboard Loading



Manage Record Types in the Data Catalog

The screenshot displays the Appian Data Governance interface. At the top, the Appian logo is on the left, and the title "Data Governance" is centered. A notification banner states "Record types successfully shown in the Data Catalog". Below the title, a subtitle reads "View the synced record types in this environment and manage which record types can be used in Process HQ".

The interface is divided into a left sidebar with filters and a main content area for record types. The filters include:

- Record Type:** A search box with the placeholder "Search by name, description, or UUIID" and a "Clear Filters" link.
- Source Name:** Radio buttons for "Appian" and "AppianAnywhere".
- Source Type:** Radio buttons for "Database", "Salesforce", "Web Service", and "Records".
- Data Stewards:** A search box with the placeholder "Search by user".
- Record Events:** Radio buttons for "Configured" and "Not Configured".
- Data Catalog:** Radio buttons for "Shown" and "Not Shown".

The main content area, titled "RECORD TYPES", features three buttons: "MANAGE DATA STEWARDS", "SHOW IN DATA CATALOG", and "HIDE FROM DATA CATALOG". Below these buttons is a table with the following columns: "Record Type", "Source Name and Type", "Data Stewards", "Dependent Processes", "Record Events", "Last Full Sync", and "Data Catalog".

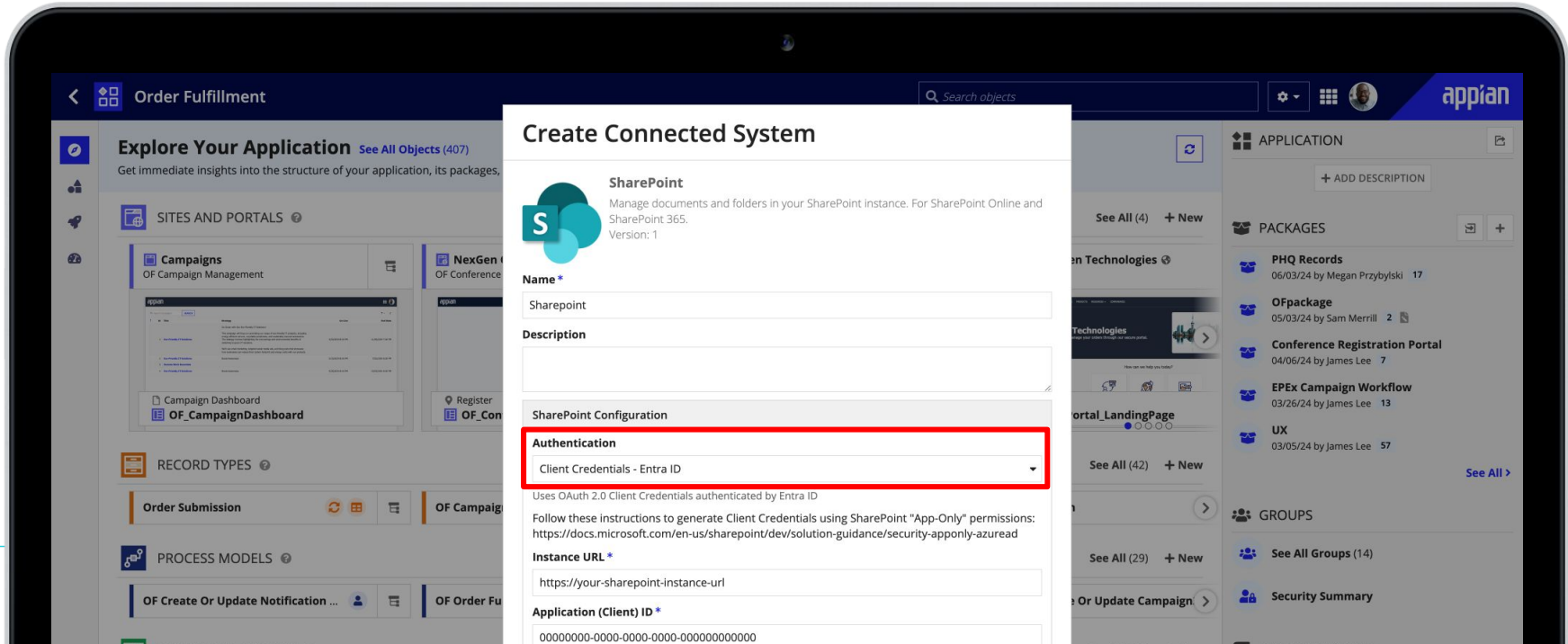
<input type="checkbox"/>	Record Type	Source Name and Type	Data Stewards	Dependent Processes	Record Events	Last Full Sync	Data Catalog
<input checked="" type="checkbox"/>	AW Address Street address information for customers, employees, and vendors.	Appian Database	-	0	Not Configured	Mar 25, 2024 6:33 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AW Address Type Types of addresses stored in the AW Address record type. For example: Billing, home, main office, pr...	Appian Database	-	0	Not Configured	Mar 25, 2024 6:30 PM	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AW Business Entity Source of the ID that connects customers and employees with address and contact information	Appian Database	-	0	Not Configured	Mar 25, 2024 6:38 PM	<input checked="" type="checkbox"/>
<input type="checkbox"/>	AW Business Entity Address Cross-reference table mapping customers, vendors, and employees to their addresses.	Appian Database	-	0	Not Configured	Mar 25, 2024 6:32 PM	<input type="checkbox"/>
<input type="checkbox"/>	AW BusinessEntity-Contact Cross-reference table mapping stores, vendors, and employees to people	Appian Database	-	0	Not Configured	Mar 26, 2024 11:26 AM	<input type="checkbox"/>
<input type="checkbox"/>	AW Contact Type Lookup record type containing the types of business entity contacts: owner, Accounting Manager, Prod...	Appian Database	-	0	Not Configured	Mar 26, 2024 11:26 AM	<input type="checkbox"/>
<input type="checkbox"/>	AW Country Lookup record type containing the ISO standard codes for countries and regions.	Appian Database	-	0	Not Configured	Mar 25, 2024 6:37 PM	<input type="checkbox"/>
<input type="checkbox"/>	AW Credit Card Customer credit card information.	Appian Database	-	0	Not Configured	Mar 26, 2024 11:23 AM	<input type="checkbox"/>
<input type="checkbox"/>	AW Currency Lookup record type containing standard ISO currencies.	Appian Database	-	0	Not Configured	Mar 26, 2024 11:21 AM	<input type="checkbox"/>

Administration

James Lee | Director, Product Evangelism

Entra ID Authentication for SharePoint

Since Microsoft is retiring Azure ACS authentication, you can now update your SharePoint connected system objects to use the **Entra ID** authentication type.



The screenshot displays the Appian interface for creating a new connected system. The main window is titled "Create Connected System" and is focused on the "SharePoint" configuration. The "Name" field is set to "Sharepoint". The "Description" field is empty. Under the "SharePoint Configuration" section, the "Authentication" dropdown menu is highlighted with a red box and is set to "Client Credentials - Entra ID". Below this, there is a note: "Uses OAuth 2.0 Client Credentials authenticated by Entra ID". Further down, there are instructions to generate Client Credentials using SharePoint "App-Only" permissions, with a link to the Microsoft documentation. The "Instance URL" field is set to "https://your-sharepoint-instance-url". The "Application (Client) ID" field is set to "00000000-0000-0000-0000-000000000000". The background shows the Appian application interface with a search bar and various navigation options.

OpenID Connect for HTTP Connected Systems

Your HTTP connected systems can call integrations on your users' behalf using the **OIDC user authentication** setup configured by your administrator.

The screenshot displays the Appian user interface with a modal dialog titled "Create Connected System". The dialog is for configuring an "HTTP" system. The "Authentication" dropdown menu is highlighted with a red box and is set to "OpenID Connect".

Create Connected System

HTTP
Integrate with other systems using HTTP to securely store/share authentication information and a base URL across integrations.

Name *
OpenID Authenticated System

Description

System Logo
OpenID Logo

Base URL
https://your-openid-authenticated-system.com

Authentication
OpenID Connect

[Learn more about configuring OpenID Connect](#)

[INSPECT TOKENS](#)

The background shows the Appian application interface with the "Order Fulfillment" section selected. The right sidebar shows the "APPLICATION" view with a list of packages including "PHQ Records", "OFpackage", "Conference Registration Portal", "EPEx Campaign Workflow", and "UX".

Rate Limiting Multi-factor Auth Requests

To improve **sign-in performance** and **security**, we're now limiting the number of times a user can request a new verification code.

After three code requests, the user won't be able to make additional requests for 15 minutes.



Search Server Upgraded to Version 8

This release, we've upgraded the Elasticsearch server from **7.17** to **8.14** and introduced a new search server authentication mechanism.

This means that self-managed customers will now need to provide a password in the configuration file, instead of an API key.



AI Powered Support Case Records Chat

Records Chat is now available for all eligible technical support cases. Support contacts can ask questions and quickly gather information about their case.

The screenshot displays the Appian support case interface for case 635198. The top navigation bar includes 'HOME', 'SUPPORT', 'HEALTH', and 'ADOPTION'. The case title is '635198 - Analysis of high disk usage on [redacted]'. Below the title are tabs for 'Summary', 'Open Cases', 'Site Access Authorizations', 'News', and 'Related Actions'. A notification bar states: 'This case has been closed for over 28 days and can no longer be reopened. For further questions about this case, please create a new support case and reference the case number 635198.' The main content area is titled 'Chat with this case' and contains a chatbot conversation. The chatbot's initial message is: 'Hi! I'm an AI-powered chatbot who can give you more information on this case. What would you like help with?'. The user's question is: 'Can you summarize the case?'. The chatbot's response provides a detailed summary of the case, including the problem, the engineer's investigation, and the resolution. On the right side, the 'Case Info' section displays: Status: Closed, Priority: 3 - Medium, Type: Technical Support, Engineer: Ashley Chen, Contact: James Lee, Created On: 15 March 2024 2:51 PM, Updated on: 26 March 2024 12:32 PM. The 'Customer Info' section shows: Company: Appian Corporation, Account Level: Standard. The 'Key Contacts' section lists: Account Executive: Margie Yeung.

HOME SUPPORT HEALTH ADOPTION

635198 - Analysis of high disk usage on [redacted]

Summary Open Cases Site Access Authorizations News Related Actions

This case has been closed for over 28 days and can no longer be reopened. For further questions about this case, please create a new support case and reference the case number 635198.

Chat with this case

Hi! I'm an AI-powered chatbot who can give you more information on this case. What would you like help with?

Can you summarize the case?

Here is a summary of the case:

James Lee submitted a case regarding high disk usage on the [redacted] environment. The disk usage was around 80-90%. An engineer, Ashley Chen, responded and saw that one node (node 3) was consuming much more disk space than the others, around 89%. Ashley thought the high usage on that node might be due to heavy use of execution and analytics engines from process models with many subprocesses.

James then provided process model metrics that did not show any outliers and OS details that did not show large engines. He asked if the high disk usage could be from an old process run or if there were ways to reduce size like checkpointing transaction logs.

Ashley responded that the high disk was due to a KDB cleanup issue and large heap dump files. The disk usage then dropped to a safe level. James thanked Ashley and said he would keep an eye on the related KDB bug ticket. He then closed the case.

In summary, the case was about identifying and resolving high disk usage on the Appian environment, which was determined to be from a KDB cleanup issue and large files. The engineer, Ashley, helped James address the issue.

Case Info

Status	Priority	Type
Closed	3 - Medium	Technical Support

Engineer	Contact
Ashley Chen	James Lee

Created On
15 March 2024 2:51 PM

Updated on
26 March 2024 12:32 PM

Customer Info

Company Appian Corporation	Account Level Standard
--------------------------------------	----------------------------------

Key Contacts

Account Executive
Margie Yeung

Beta Programs

Elizabeth Hall | Sr Beta Program Manager

Appian Beta Program Page on Community

The screenshot shows the Appian Community website's beta program page. At the top left is the 'appian Community' logo. To the right is a 'Sign In/Register' button. Below the logo is a navigation menu with links for 'DISCUSS', 'LEARN', 'SUCCESS', 'SUPPORT', 'DOCUMENTATION', and 'APPMARKET'. The main banner features a background image of people working on laptops with a large purple and pink wave graphic. The banner text reads 'Appian Beta Program' and 'Explore in-progress and upcoming beta programs, results from our previous beta programs, and more!'. Below the banner is a search bar with the placeholder text 'I'm looking for ...' and a magnifying glass icon. The 'About' section contains a paragraph of text and two buttons: 'Interest Form' and 'Program FAQs'. To the right of the text is an image of five people standing around a green chalkboard covered in sticky notes, engaged in a discussion.

appian Community [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!

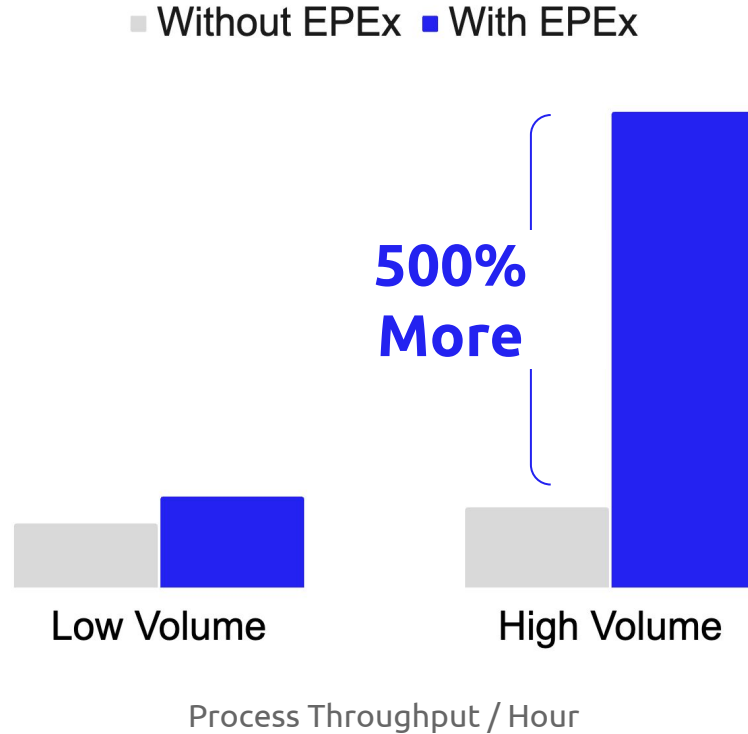
I'm looking for ...

About

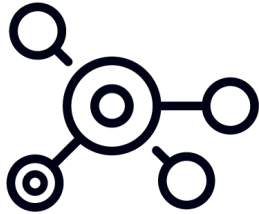
Welcome to the Appian Beta Program Community site! By participating in any of Appian's beta programs, you'll have the unique opportunity to gain early access to our latest innovations and get the chance to provide feedback to help shape the direction of the product. Additionally, you'll have free support from Appian subject matter experts to advise on the best implementation strategies for your use case.

[Interest Form](#) [Program FAQs](#)

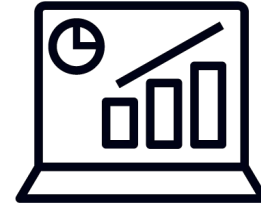
Autoscaling for High-Throughput Processes



Data Fabric Enhancements

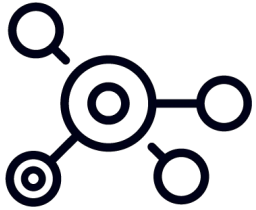


**Faster performance for
complex queries**



**Support for higher data
volumes**

Appian 3D+



Integrate your **CAD files** with your **data fabric** to create a **digital thread** across your enterprise.



Any File



Anywhere



Securely

3D+ Livestream featuring Macedon Technologies

ACL_applan3DViewer

Interface Definition

```
1. allLocalVariables
2. local !markUpDataToLoad,
3. local !partData,
4. local !markUpDataToSave,
5. local !partToIsolate,
6. local !colorDictionary,
7. {
8.   @buttonArrayLayout(==),
43.   cadWebViewer
44.   documentId: 6130,
45.   onPartSelection: @saveLocalPart
46.   isolateParts: {local !partToIsolate,
47.   colorDictionary: local !colorDictio
48.   backgroundColor: null},
49.   markUpData: local !markUpDataToLoa
50.   saveMarkUpTo: @saveLocal!markUp
51.   canvasHeight: 800
52. }
53. }
54. }
```

Local Variables

Name	Value
markUpDataToLoad	null
partData	{TYPE:IFCFOOTING,OWNE...
TYPE	IFCFOOTING
OWNERHISTORY...	Architect
OWNERHISTORY...	Nemetschek Vectorworks...
OWNERHISTORY...	Nemetschek Vectorworks...
OWNERHISTORY...	17_0_4_1
OWNERHISTORY...	Vectorworks Architect 201...
OWNERHISTORY...	VW1704
OWNERHISTORY...	NOCHANGE
OWNERHISTORY...	1337562620
OWNERHISTORY...	1337562620
MATERIAL/Name	Default
IFCFOOTING/Name	IFCFooting
IFCFOOTING/GlobalId	3F8xU6Xr98QR0hku/Cp
IFCFOOTING/Prede...	PAD_FOOTING
Surface Area	43279998.85mm²
Volume	6479999838.87mm³
COG	x:6,594.079 y:1,000.927 ...
name	IFCFooting
nodeId	23711
markUpDataToSave	null
partToIsolate	null
colorDictionary	null



Kenny Rosenberg
Senior Solutions Consultant
Macedon Technologies



Brooks Watson
Product Strategy Software Engineer II



Sam Knecht

Community

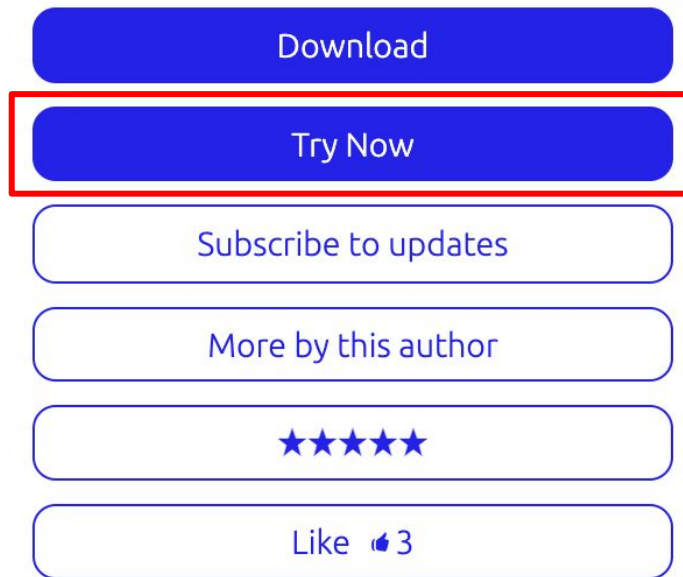
Kait Bonifaz | Product Evangelist

New “Try Now” on Select AppMarket Listings



In select AppMarket listings, you will now be able **get hands-on** with the listing’s functionality **without the need to install** it in your environment.

We are excited to make this capability available first on the ESRI map component plug-in.



New Community Edition App Catalog Offerings

The screenshot displays the Appian App Catalog interface. On the left, there is a sidebar with filters for NAME, TYPE, TAGS, and SKILL LEVELS. The main area is titled 'APPLICATIONS' and shows a grid of application cards. Each card includes a thumbnail, a title, a skill level (Tutorial, Beginner, Intermediate), and a brief description. The 'Advanced Expressions' and 'Order Management' cards are highlighted with a red border.

appian Home > App Catalog

FILTERS

NAME
Search app by name...

TYPE
-- Select Types --

TAGS
-- Select Tags --

SKILL LEVELS
 Beginner
 Intermediate
 Advanced

APPLICATIONS Deployment Tokens: 1

Wyndham Power Outage
Tutorial Beginner
Empower Wyndham Power customers to report outages with a user-friendly portal. This app includes built-in ops for seamless monitoring.

Acme Automobile Applications
Tutorial Beginner
Manage vehicle additions and maintenance within a commercial fleet while practicing with courses on Academy Online.

Acme IT Management
Tutorial Beginner
In need of a system to oversee all IT assets organization-wide, plan and develop an application to track equipment and handle asset requests.

AI Skills
Tutorial Beginner
Automate business tasks with document classification, document extraction, and email classification AI skills to streamline workflows effortlessly.

Advanced Expressions
Tutorial Intermediate
Get hands-on practice with indexing values, applying best practices for expression writing, using looping functions, and more!

Order Management
Tutorial Beginner
Get hands-on practice with Process HQ using this sample order management use case.

Dig Deeper with Release Showcases

Learn all about the new and updated features in the 24.3 release showcase.

Highlights Include

- AI Copilot for Data Fabric
- Process HQ Enhancements
- New Modules for Case Management Studio
- Add & Edit Source Data Directly from a Record Type

Certified Users!

Don't forget to complete the 24.3 release showcase and **maintain your certification.**

(Training available when the 24.3 release is GA)

The screenshot displays the 'NZC Service Request' application interface. On the left is a navigation sidebar with categories: DATA (Data Model, Data Preview, Events, Sync Options), USER EXPERIENCE (List, Filters, Views, Actions, Workspaces), SECURITY (Record-Level Security, Views and Actions Security), and MONITORING (Performance, Sync History). The 'Data Preview' section is active, showing a table of service requests. A 'Write Changes' warning is present at the top of the data preview area. Below the table, there are search and action buttons: 'Search values', '+ ADD ROW', and 'GENERATE SAMPLE DATA'. A note indicates 'Preview upto 1,000 rows in the data source, or search for a specific row'.

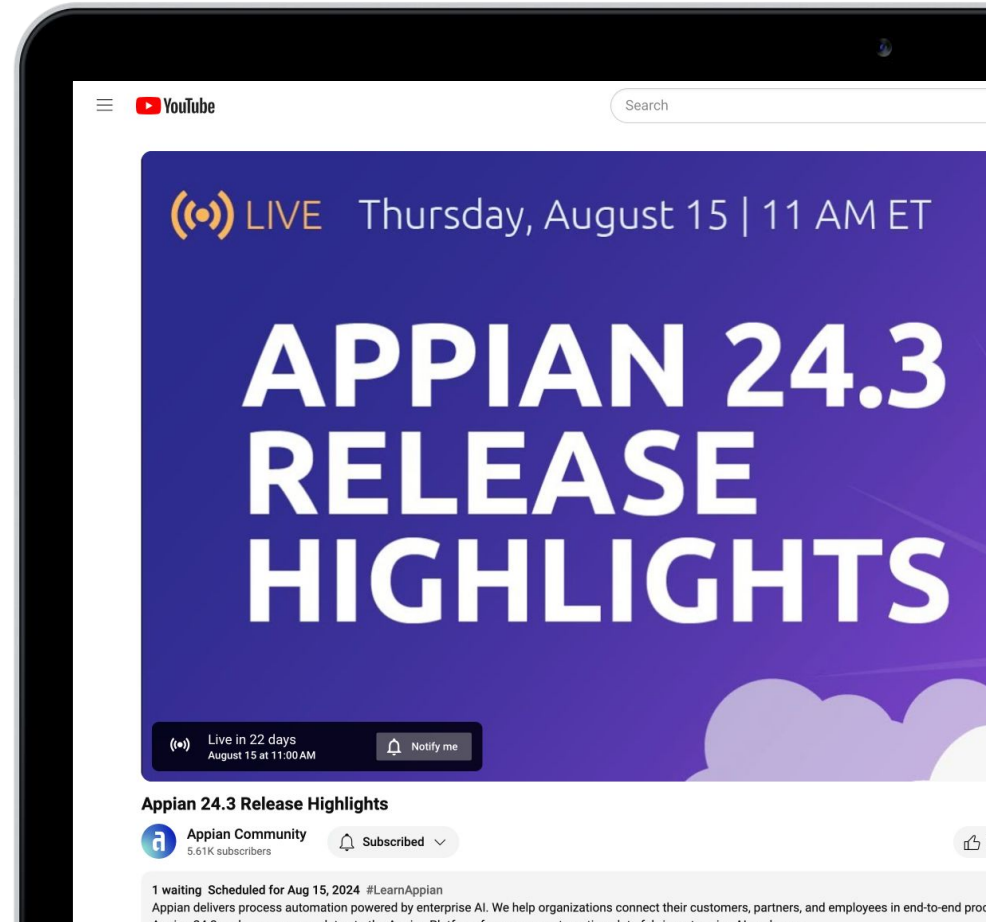
id	serviceRequestTitle	serviceRequestDescription	aiSummarizedDescription	installationId	repa
3	Water damage degrading operation	There was a ceiling leak in one of the skylight windows over the weekend that lead to one of the two escalators degrading in function. Effectively it is not moving smoothly, and occasionally makes grinding noises.		VT1H62	
1	Button floor mappings misaligned	This elevator has been working perfectly ...			
2	General Service Request	N/A			
3	Water damage degrading operation	There was a ceiling leak in one of the skyl...			
4	General Service Request	N/A			
5	Water damage degrading operation	There was a ceiling leak in one of the skyl...			
6	General Service Request	N/A			
7	General Service Request	N/A			
8	Escalator belt worn, needs a replacement	Doing our routine inspections, we notice...			

Appian Community YouTube Channel

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

200+ videos & livestreams, with new content every week.

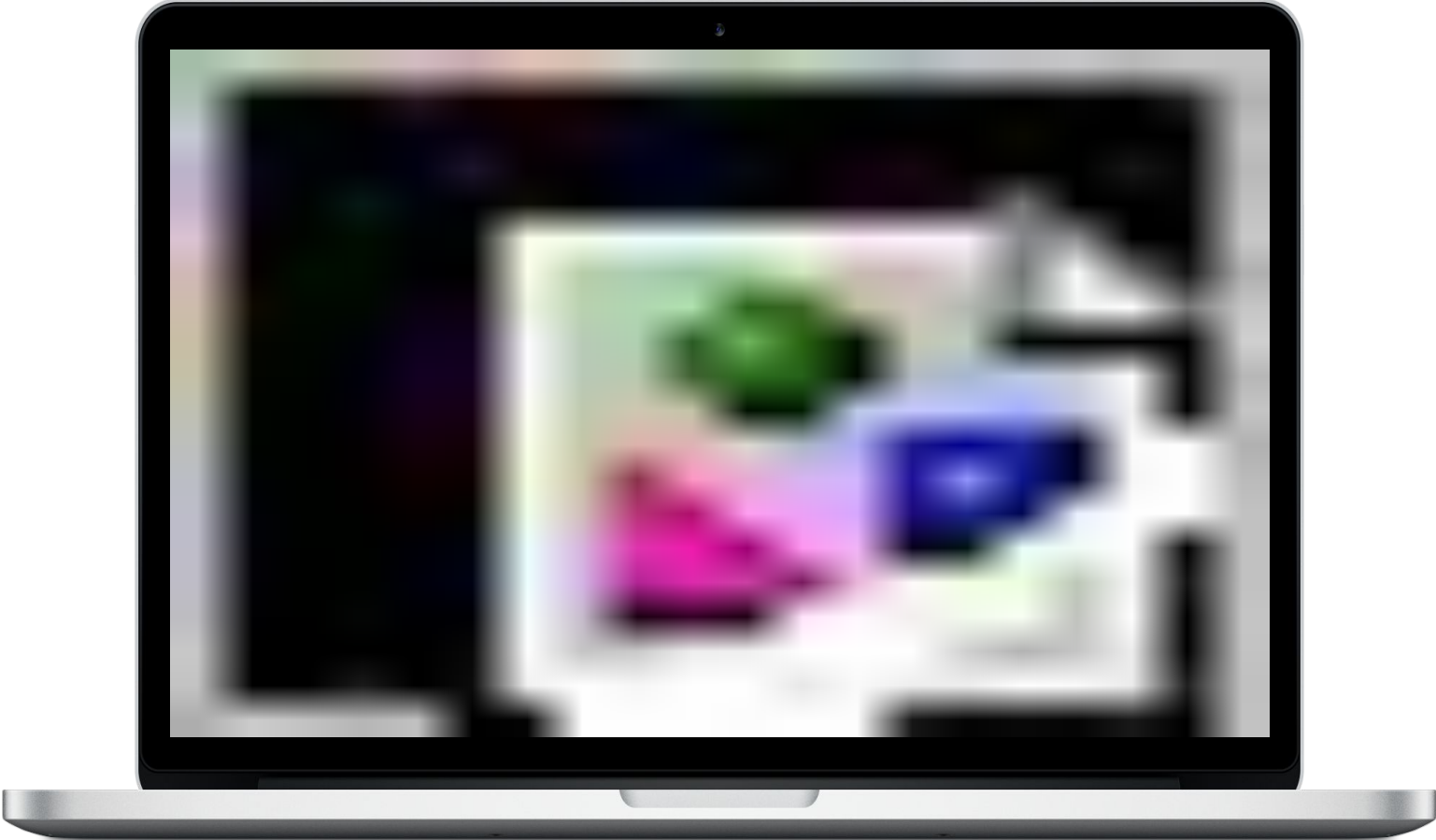
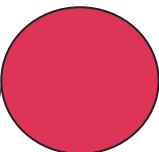
Next livestream → **24.3 Release Highlights**



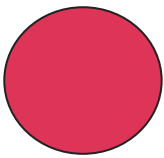
A person is seen from behind, sitting at a desk and using a laptop. The laptop screen displays a dashboard with various data visualizations. The dashboard includes a 'Total invoice' of 16,604,876, an 'Avg invoice volume' of 5,464, and an 'Avg cycle time' of 2 w, 1 d. There are also charts for 'Invoice volume vs number of cases' and 'Top five vendors'. A blue water bottle is visible on the desk next to the laptop. The background shows a window with a view of a building.

Thank you.

Develop New Interface Components with the USD



Update URL Parameters Dynamically

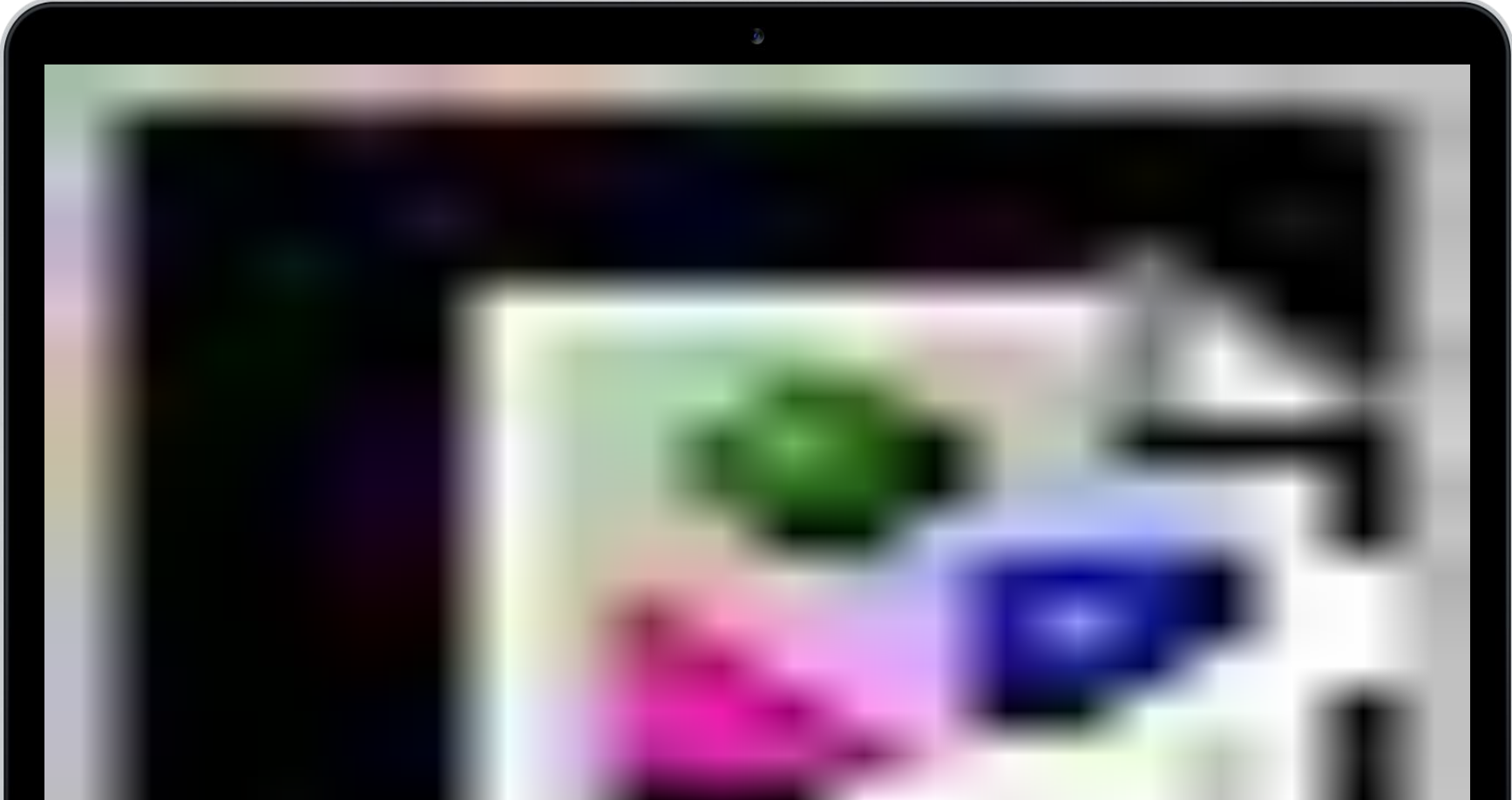
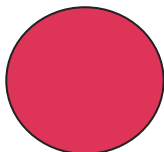


Configure pages in your sites and portals to **dynamically update URL parameters**, improving how your users interact with and move between pages.

The screenshot shows the Appian 'Edit Page' configuration interface for 'OF Order Management'. The interface is divided into several sections:

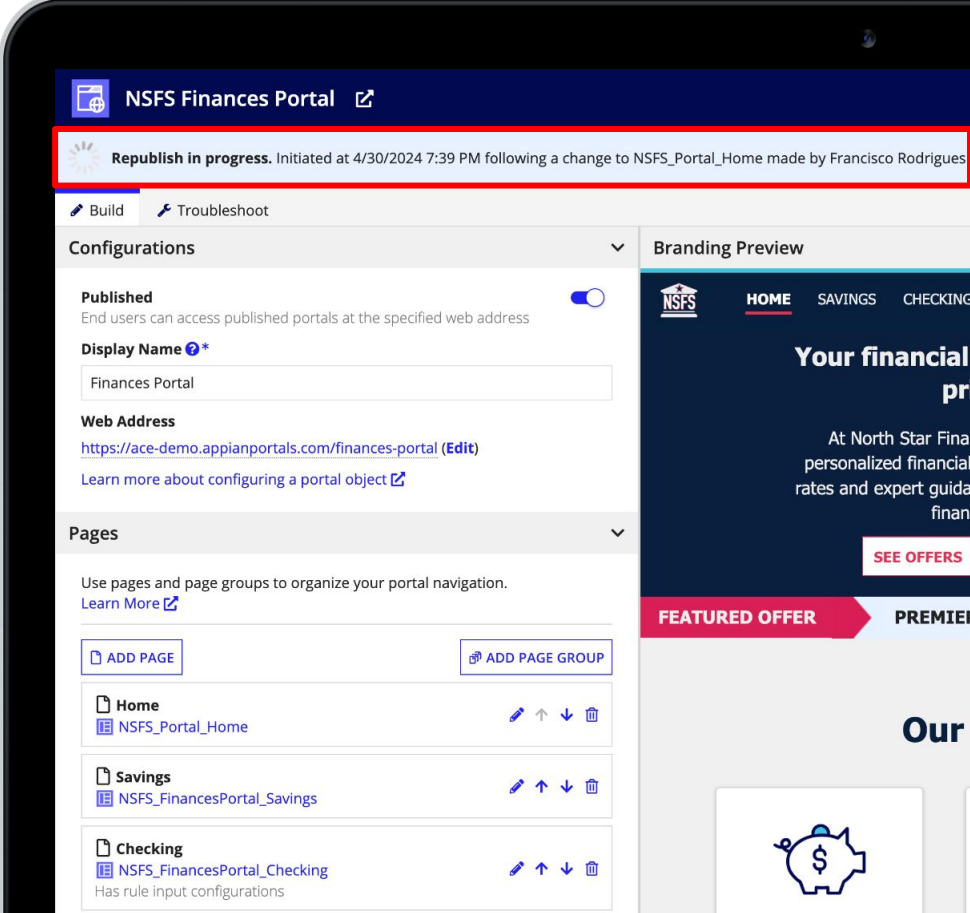
- Configurations:** Includes settings for Display Name (Static/Expression), Web Address, Show Tempo Link in Navigation Menu, Show Record News, and Show Task List on Mobile.
- Pages:** Lists pages like 'Home' and 'Orders' with options to add new pages or groups.
- Branding Preview:** Shows a live preview of the page with the Appian logo and various data cards (e.g., Order Fulfillment Time: 7.99 days, Completed This Week: 1107 orders).
- Edit Page Modal:** A central modal window titled 'Edit Page' containing:
 - Rule Input Configuration:** A section explaining that rule inputs are mapped to URL parameter names.
 - Encrypt URL parameters:** A checkbox option.
 - Warning:** A blue box warning that plain text URL parameters can expose sensitive data.
 - Table:** A table with columns: Rule Input, Enable in URLs, URL Parameter Name, Default Value, and Default Value Preview.
 - Update URL when rule input values change:** A checked checkbox option.
- Calendar:** A calendar view for May 2024.

New Live Preview in Sites Designer



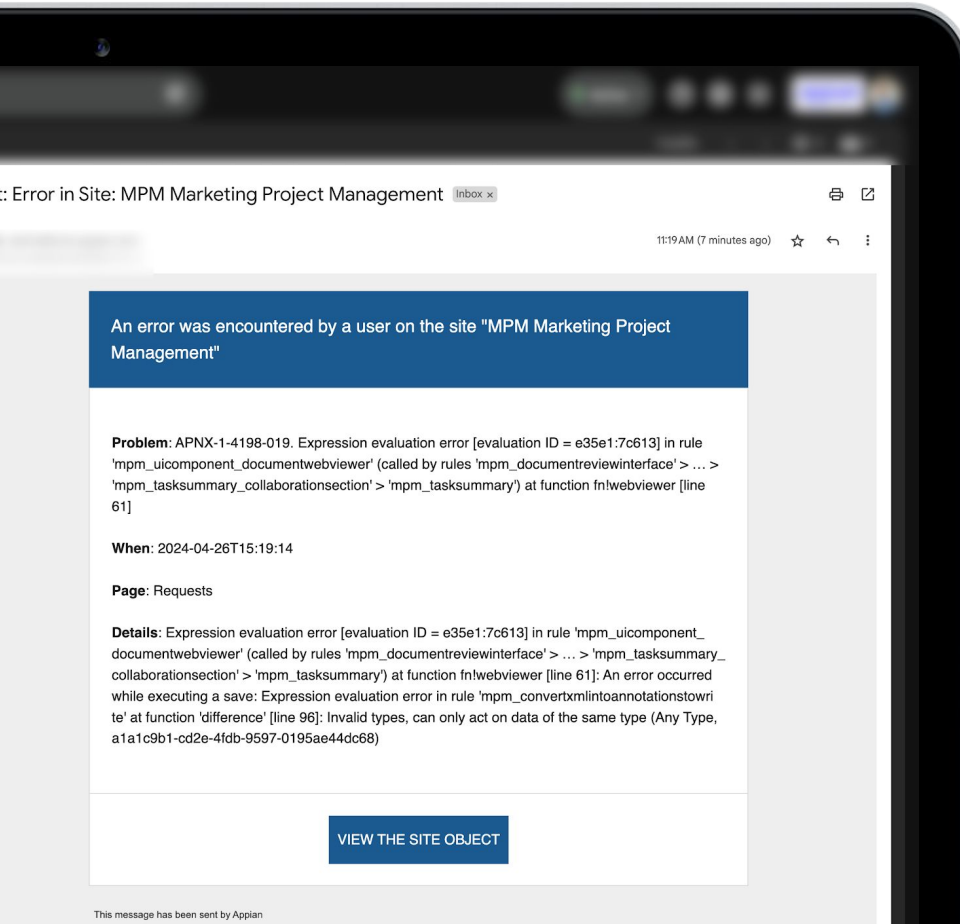
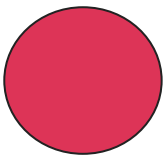
Collaborate Efficiently with Portal Status Details

Know **who** and **what** triggered portals publishing actions at a glance.



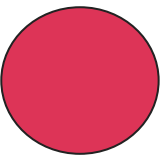
The screenshot displays the 'NSFS Finances Portal' configuration page. A red box highlights a notification at the top: 'Republish in progress. Initiated at 4/30/2024 7:39 PM following a change to NSFS_Portal_Home made by Francisco Rodrigues'. Below the notification, there are tabs for 'Build' and 'Troubleshoot'. The main content is divided into two columns: 'Configurations' and 'Branding Preview'. The 'Configurations' section includes a 'Published' toggle, a 'Display Name' field (set to 'Finances Portal'), and a 'Web Address' field (set to 'https://ace-demo.appianportals.com/finances-portal'). The 'Pages' section lists three page groups: 'Home' (NSFS_Portal_Home), 'Savings' (NSFS_FinancesPortal_Savings), and 'Checking' (NSFS_FinancesPortal_Checking). The 'Branding Preview' section shows a navigation menu with 'HOME', 'SAVINGS', and 'CHECKING' options, and a featured offer banner.

Improved Monitoring with Site Error Emails



When a user encounters an error in a **site**, Administrators will receive an email with more details.

Faster Offline Form Re-Evaluations



SPEED UP!

We've continued optimizing the offline mobile experience with **improved performance** for offline form re-evaluations.

These improvements will lead to **faster evaluation times** and a better overall user experience.

Self-Managed RPA

When you upgrade to **RPA 9.9** and **Appian Operator 0.156.0**, you can enable Appian's RPA features in your Appian on Kubernetes environment.

Now, whether you're cloud-based or self-managed, you can use Appian RPA to free up your workforce.

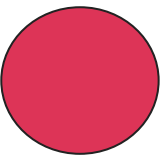


appian



kubernetes

Easily Audit Group Membership Changes



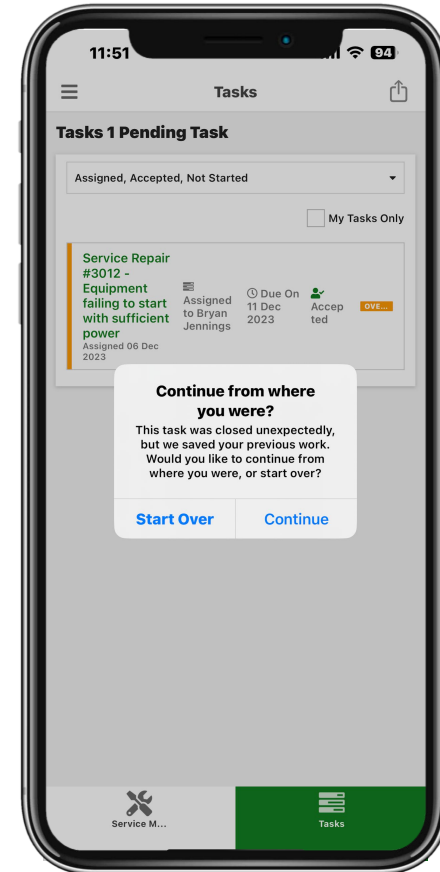
Quickly audit changes to your groups from one place with the *group_management.csv* log, found within */logs/audit/*.

This log contains entries for all group membership changes, allowing you to keep a record of the users who initiated those changes.

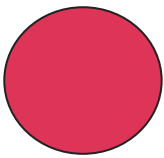


Auto Recover Data in Offline Tasks

Users can now **automatically recover** offline tasks when they are closed unexpectedly, safeguarding user-entered data and minimizing the risk of data loss.



Preview Signatures in Appian Mobile



12:07

Moller

Goyette-Considine Shopping Center - 1/F - 5/F Northeast

Progress indicators: Envelope, Question mark, ID card, Checkmark

Contact Details

Provide your name and email.

First Name * John 4/50 **Last Name *** Smith 5/50

Email * John.smith@flexoid.com 22/70

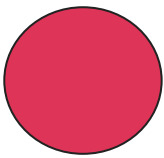
Signature preview: John Smith (highlighted with a red box)

Clear Signature

NEXT

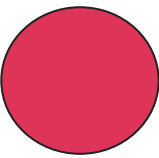
CANCEL

Update Credentials for Connected Systems



The system API will take in a **connected system UUID** along with **key/value pairs** to update.

Eleven New Use-Case-Driven AI Skills



**Document
Classification**

**Document
Extraction**

**Email
Classification**

**Document
Summarization**

**Unstructured
Document
Extraction**

**PII Extraction
from
Document**

**Email
Summarization**

**Email
Extraction**

**PII Extraction
from Email**

**Gen AI
Prompt Builder**

**Text
Summarization**

**PII Extraction
from Text**

**Text
Extraction**

**Text
Generation**

**Text
Classification**

