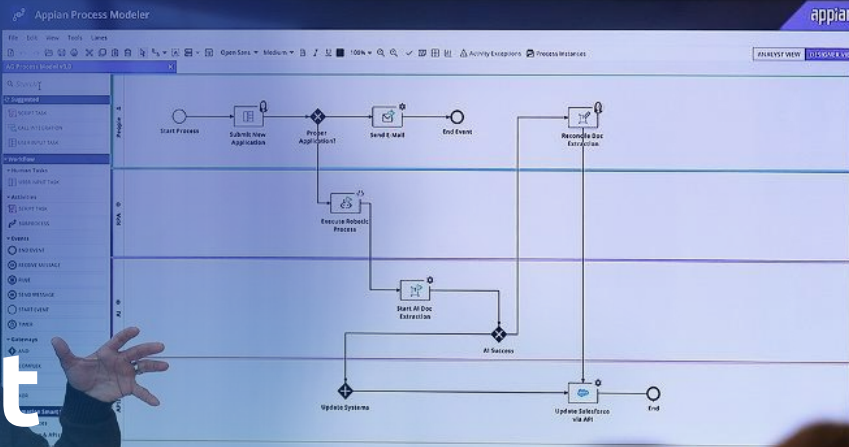


# Appian 24.2 Product Announcement Webinar

James Lee		Director, Product Evangelism
Kelsey Robertson		Sr Product Manager
Lisa Graham		Sr Product Manager II
Gabby Rothschild		Sr Product Manager
Kelsey Ross		Sr Product Manager II
Elizabeth Hall		Sr Beta Program Manager
Brooks Watson		Product Strategy Software Engineer II
April Schuppel		Lead Developer Advocate



# appian | World

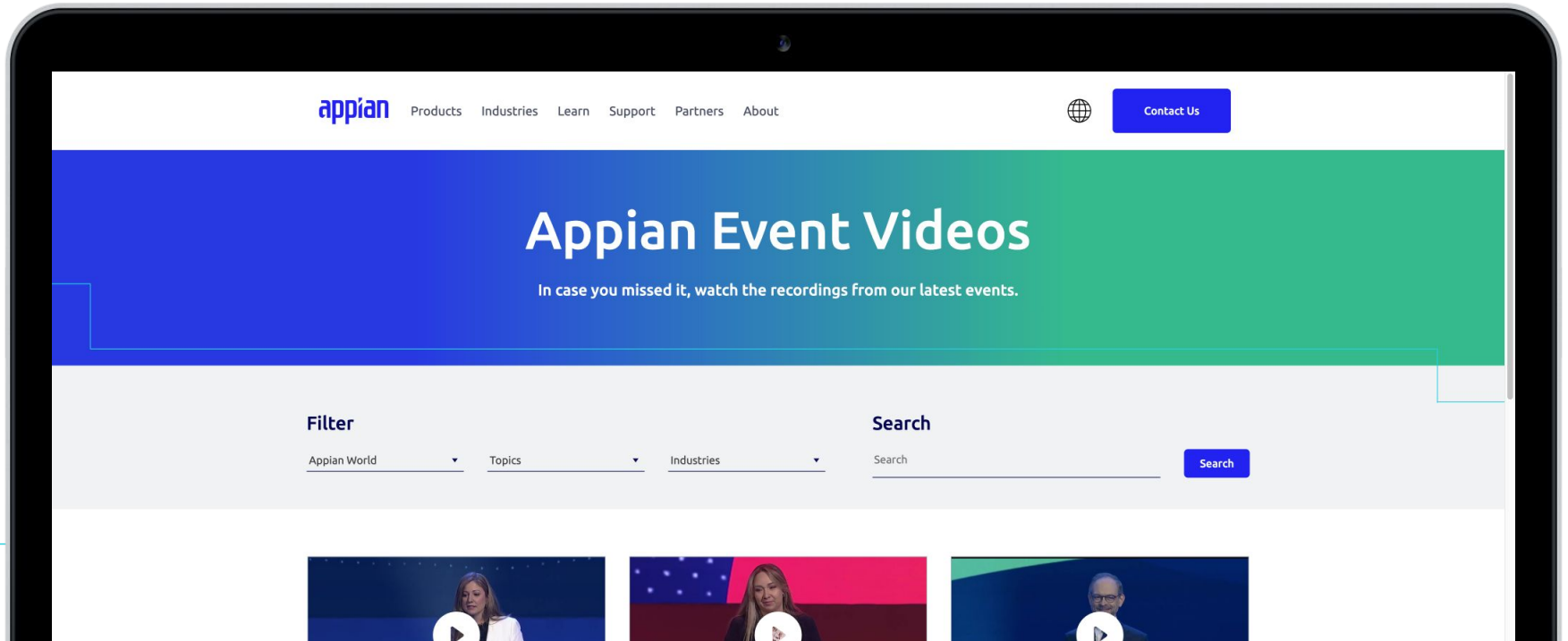


Thank you for attending Appian World 2024!



# Appian World 2024 Videos

Appian World 2024 recordings are now available for viewing on appian.com.



appian | Government

# Save the Date

October 30, 2024  
Capital One Hall  
McLean, VA

[www.AppianGovernment.com](http://www.AppianGovernment.com)



appian | Europe

# Save the Date

3 December 2024  
InterContinental London – The O2  
London, UK

[AppianEurope.com](https://AppianEurope.com)



# New Next-Gen Enterprise Monthly Newsletter

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

The Appian logo is displayed in a blue, lowercase, sans-serif font.

## Sign up for the *Next-Gen Enterprise* monthly newsletter.

Welcome to the Next-Gen Enterprise newsletter. Each month, you'll get a curated selection of the latest enterprise technology trends, automation best practices, and expert insights to improve your processes.

James

Lee

Business Email \*

Appian Corporation

Not James Lee? [Click Here](#)

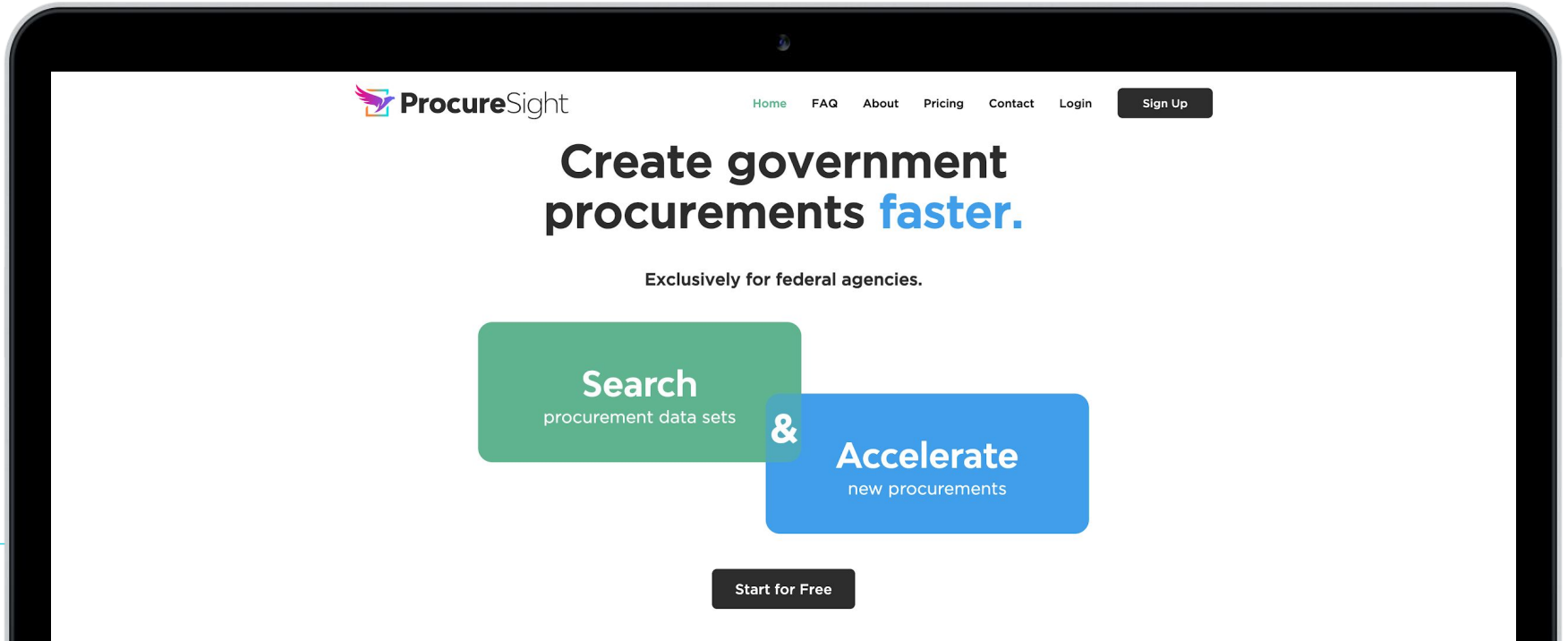
Director, Product Evangelism

United States

Which news would you like to receive? \*

# ProcureSight is Here!

A standalone data service that leverages **Appian AI** and **data fabric** to allow users to **find** and **process** public procurement data sets more efficiently.





# 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

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			

## MARCH

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

# 24.1

## APRIL

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					

## MAY

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	

## JUNE

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

# 24.2

## JULY

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				

## AUGUST

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	

## SEPTEMBER

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						

# 24.3

## OCTOBER

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			

## NOVEMBER

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	

## 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					

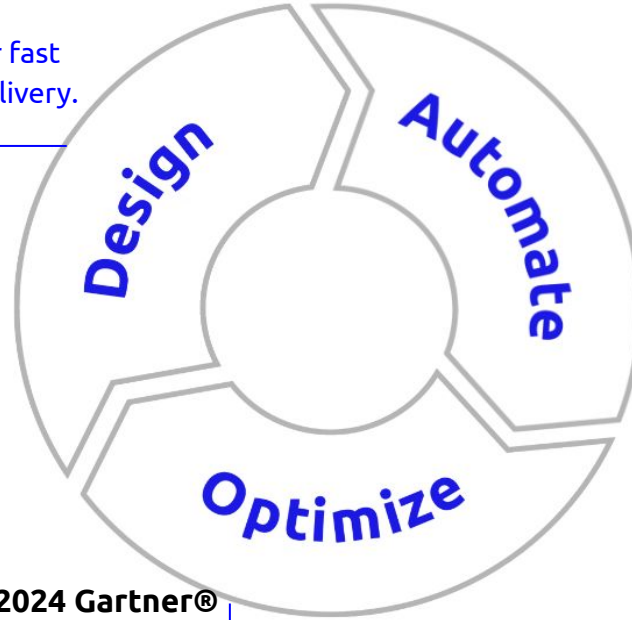
# 24.4

# appian

24.2 Release  
May 24th, 2024

**A Leader in the 2023  
Gartner® Magic Quadrant™  
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**Design** with low-code for fast enterprise application delivery.



**#1 for Business  
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Use Case**

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**Optimize** for results with process mining and enterprise intelligence.

# Low-Code Design



# AI-Copilot for Developers

# Build Faster with AI-Generated Sample Data



Campaign SAVE CHANGES SEARCH SETTINGS APPIAN

## Create Sample Data

**Campaign** Hide Advanced Configuration

name	startDate	createdOn	modifiedOn
IT Infrastructure Upgrade Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Network Security Awareness Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Cloud Migration Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Application Modernization Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Software Asset Management Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Data Center Consolidation Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Cybersecurity Awareness Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
IT Asset Management Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Endpoint Management Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00
Disaster Recovery Testing Campaign	4/29/2024	4/29/2024 8:04 PM GMT+00:00	4/29/2024 8:04 PM GMT+00:00

10 items

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

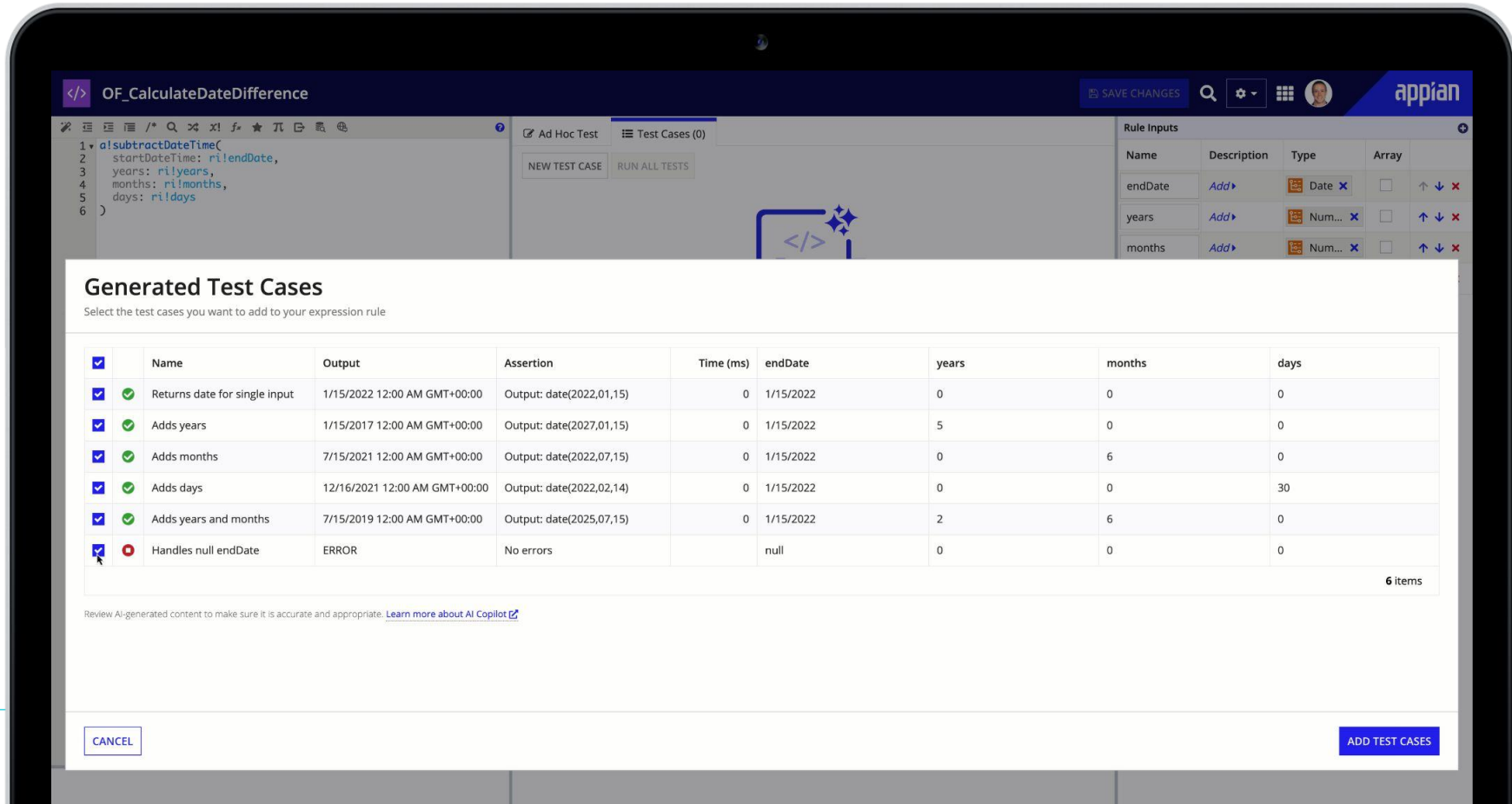
**Record Fields**  
AI will create sample data for the selected record fields.

Field Name	Field Type
<input checked="" type="checkbox"/> id	Number (Integer)
<input checked="" type="checkbox"/> name	Text
<input checked="" type="checkbox"/> startDate	Date
<input checked="" type="checkbox"/> statusId	Number (Integer)
<input checked="" type="checkbox"/> employeeId	Number (Integer)
<input checked="" type="checkbox"/> createdBy	User
<input checked="" type="checkbox"/> createdOn	Date and Time

**Additional Instructions**  
Tell the AI about your preferences. For example, you could provide details about what to include or avoid.

Make the campaigns more IT themed

# AI-Generated Test Cases for Rules [Preview]



The screenshot shows the Appian interface for editing a rule named 'OF\_CalculateDateDifference'. The rule's code is visible in the top left, and the 'Rule Inputs' table is on the right. A modal window titled 'Generated Test Cases' is open, displaying a table of test cases generated by AI Copilot. The table includes columns for Name, Output, Assertion, Time (ms), endDate, years, months, and days. The test cases cover various scenarios like single input, adding years, months, and days, and handling null values. A 'CANCEL' button is at the bottom left, and an 'ADD TEST CASES' button is at the bottom right.

```
1. a!subtractDateTime(  
2.   startDate: r!endDate,  
3.   years: r!years,  
4.   months: r!months,  
5.   days: r!days  
6. )
```

Name	Description	Type	Array
endDate	Add	Date	<input type="checkbox"/>
years	Add	Num...	<input type="checkbox"/>
months	Add	Num...	<input type="checkbox"/>

### Generated Test Cases

Select the test cases you want to add to your expression rule

<input checked="" type="checkbox"/>	Name	Output	Assertion	Time (ms)	endDate	years	months	days
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Returns date for single input	1/15/2022 12:00 AM GMT+00:00	Output: date(2022,01,15)	0	1/15/2022	0	0	0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Adds years	1/15/2017 12:00 AM GMT+00:00	Output: date(2027,01,15)	0	1/15/2022	5	0	0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Adds months	7/15/2021 12:00 AM GMT+00:00	Output: date(2022,07,15)	0	1/15/2022	0	6	0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Adds days	12/16/2021 12:00 AM GMT+00:00	Output: date(2022,02,14)	0	1/15/2022	0	0	30
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Adds years and months	7/15/2019 12:00 AM GMT+00:00	Output: date(2025,07,15)	0	1/15/2022	2	6	0
<input checked="" type="checkbox"/>	<input type="checkbox"/> Handles null endDate	ERROR	No errors		null	0	0	0

6 items

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

# Case Management Studio



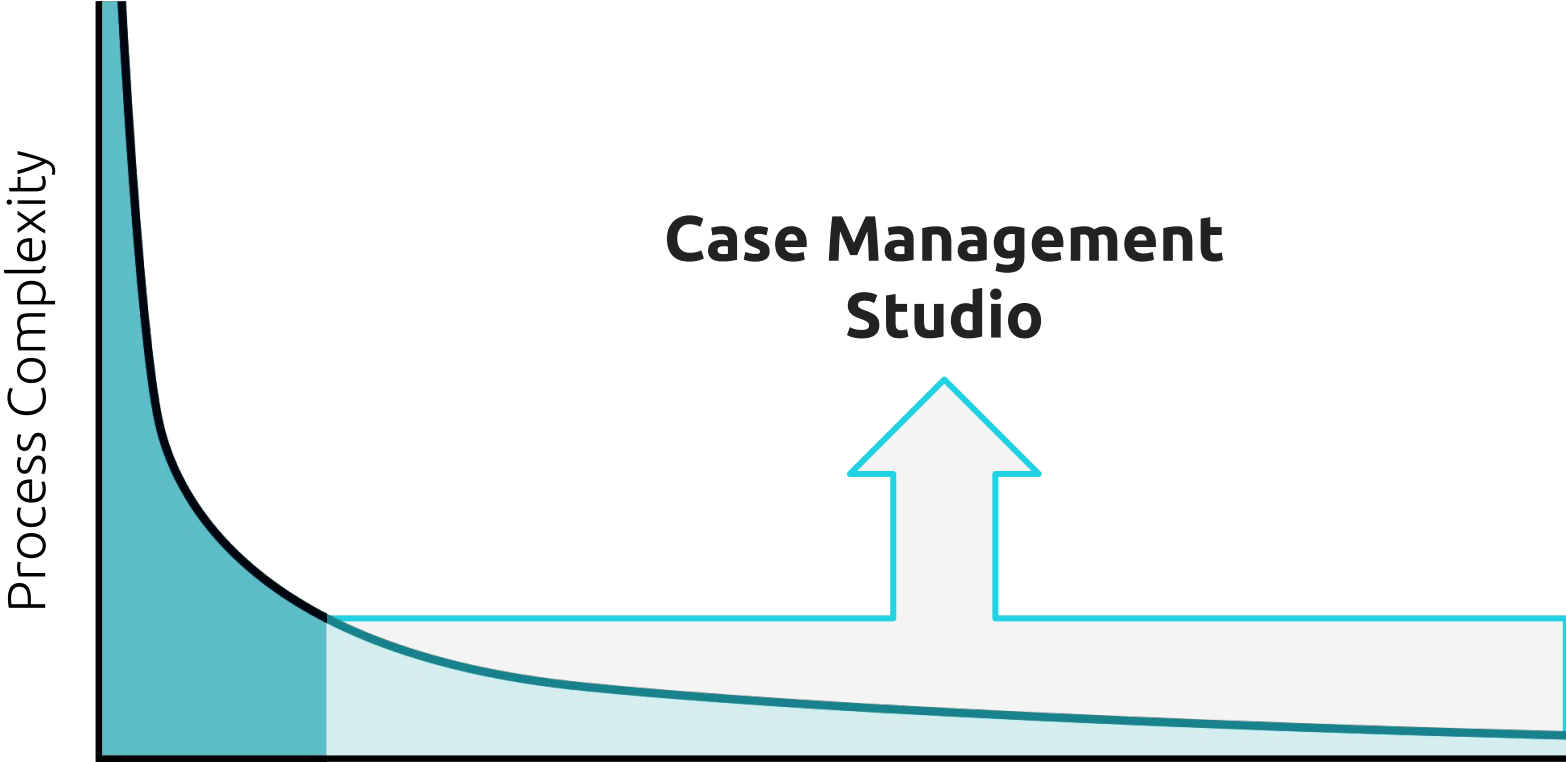
**Case Management is**

Employee Service  
Customer Service  
Risk Management  
Regulatory Compliance

**Insurance Claims**

Clinical Trials  
Customer Onboarding  
Field Service  
Research & Development

# Process Orchestration Across the Enterprise



Process Opportunities



## **End Users**

Applications



## **Citizen Developers**

Case Management  
Studio



## **Low-Code Developers**

Low-Code  
Designer




## **Pro-Code Developers**

Integration &  
UI SDK

# New Case Record Chat Module



**applan**    WORKSPACE    CASES    ENTITIES    SEARCH    REPORTING ▾    Workspace ▾ 

## PQP-AB91075 Inaccurate Information provided by Airline

**Summary**    Tasks    Documents    History

**Information** ⓘ

I booked a flight based on the information provided by the airline's website, but when I arrived at the airport, I found out that the flight was delayed by several hours. The website did not update th..

**Tasks**

Active 1		Resolved 4	
Task	Status	Assignee	Due
Disciplinary Actions Decision	🟢 Ready	Robert Ward, James Baker 👤 Credit	🔴 Mar 4, 2024

**Recent Documents** [View All](#)

<b>Photographs.png</b> 51.68 KB 🔒 Nov 4, 2023 by Peter Harris	<b>Audit Reports.png</b> 389.35 KB 🔒 Nov 3, 2023 by Angela Lewis	<b>Expert Report.pdf</b> 234.62 KB 🔒 Oct 28, 2023 by —
<b>Investigation Findings.png</b> 118.98 KB 🔒 Oct 28, 2023 by —	<b>Work Order.png</b> 162.6 KB 🔒 Oct 28, 2023 by —	<b>Legal Agreement.pdf</b> 108.32 KB 🔒 Oct 28, 2023 by —

**Comments**

All 40		Pinned 17	
--------	--	-----------	--

**AI Smart Suggestions**

0 related cases identified [Update Related Cases](#)

**Chat about your case** ▾

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

Hi! I'm a chatbot who can give you more information about this case. What would you like help with?

Can you please provide a summary of this case?

Here is a summary of the key details of this case:

- The case relates to a customer who booked a flight based on information provided on an airline's website, but when they arrived at the airport found the flight was delayed by several hours which was not updated on the website.
- The case was created on October 28, 2023 and is overdue, with a due date of March 26, 2024. It involves two entities and has been assigned to one individual and two groups.
- Several milestones have been defined including initial assessment, analysis, resolution, and closure. However, the resolution milestone currently has no resolved tasks.
- Key documents include an expert report, investigation findings, work order, legal agreement, background checks, and photographs.
- Numerous comments have been added by various users discussing escalation, ensuring compliance, resolution progress, requests for documentation, and recording customer interactions.

# Automate Case Routing for Faster Resolutions

The screenshot displays the Appian Case Assignment configuration page. A modal dialog titled "Create Assignment Rule" is open, allowing the user to define a routing rule. The dialog includes a table for conditions, an assignees section, and routing type options.

**Appian Case Assignment Interface**

**Case Assignment** CREATE ASSIGNMENT RULE MANAGE RULES

If no rules apply the case will be assigned according to the case type's default assigned group

MY FILTERS **All Rules**

Search Assignment Rules  SEARCH STATUS | Active TEAM | Any

Priority	Name
1	BreachRouting
2	FirstIn

**Create Assignment Rule**

Field *	Operator *	Value *
Case Type	Equal to	Candidate Onboarding

[ADD CONDITION](#)  
[ADD CONDITION GROUP](#)

**Assignees**  
Define who to assign these cases to.

Assigned Team \*

Exclude Users

**Routing Type \***

- Round Robin**  
Selects users in turn order
- Workload Balance**  
User with least work in progress
- Shared Queue**  
Anyone on the team can pick from a shared queue

CANCEL CREATE

# Easily use Reference Data with Choice List Fields

The screenshot displays the Appian Studio interface for configuring a data field. The main window shows a 'New Hire Onboarding' case type with various data fields. A modal dialog titled 'Create Data Field' is open, allowing the user to define a new field.

**Appian Studio Interface:**

- Header: appian | CASE TYPES | TASKING | Studio | [User Profile]
- Breadcrumbs: All Case Types / Employee Services / New Hire Onboarding
- Left Sidebar: Details, Data, Intake Form, Workflow, Summary Page
- Main Content: New Hire Onboarding Data (Name, Start Date, Office Location, Desk Number, Employee Department), Employee Services Data (Department, Department Code, Manager, Location), All Case Types Data (Case, Test, Comment, Single Family Home, Inspector Time)

**Create Data Field Dialog:**

- Title:** Create Data Field
- Name \*:** Employment Status
- Type \*:** Choice List
- Warning:** Once created, list options can only be edited by a system administrator. Check your options before finalizing.
- Options \*:** Full Time, Part Time, Contract
- Buttons:** CANCEL, CREATE

**Data Visualization:**

- Buttons: Add data field, Data Visualization
- Navigation: Search, Filter, Refresh
- Diagram: A hierarchical tree structure showing 'All Cases' branching into various categories like 'Financial Services Ba Office', 'Fund Management', 'Health', 'HR - Corporate Function', 'HR - Manager Resources', and 'HR'. Each category has associated 'Case Types' counts.

# Total Experience

Kelsey Robertson | Sr Product Manager

# Customize Portals with Component Plug-ins



ESG World 2023 is the most important global gathering of advocates and thought leaders on **Environmental, Social, and Governance** topics.

**ENGLISH**

简体中文

हिन्दी

ESPAÑOL

FRANÇAIS

العربية

DEUTSCHE

日本語

## Conference Experience Feedback

Thank you for attending the ESG conference! We value your feedback to help us improve future events. Please take a few minutes to complete this survey and share your thoughts on your conference experience. Your input is valuable to us!

**Name**

Francisco Rodriguez

**Organization**

GreenVista Sustainability Solutions

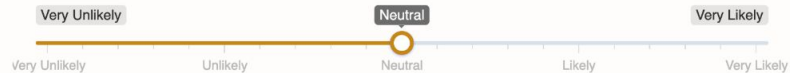
**Please rate your overall experience at the ESG conference.**



**Please share the key insights or learnings you gained from the conference.**

**Would you be willing to present your use case at a future conference?**

**How likely are you to recommend this conference to a colleague or friend?**





# 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 preview of the page with the Appian logo and various data cards such as 'Order Fulfillment Time: 7.99 days', 'Completed This Week: 1107 orders', 'Completed This Month: 703 orders', and 'Average Order Price: \$216.97'.
- Edit Page Modal:** A central modal window titled 'Edit Page' with the following content:
  - Rule Input Configuration:** A text box explaining that rule inputs are mapped to URL parameter names.
  - Encrypt URL parameters
  - Warning:** Plain text URL parameters can expose sensitive data if not configured correctly.
  - Table:** A table with columns: Rule Input, Enable in URLs, URL Parameter Name, Default Value, and Default Value Preview.

Rule Input	Enable in URLs	URL Parameter Name	Default Value	Default Value Preview
myOrders (Boolean)	<input checked="" type="checkbox"/>	myOrders	null	
pastDue (Boolean)	<input checked="" type="checkbox"/>	pastDue	null	
  - Update URL when rule input values change
- Calendar:** A calendar view for May 2024.

# New Live Preview in Sites Designer

The screenshot displays the Appian Sites Designer interface for a 'Manager Site'. 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:** A list of pages and page groups, including Home, Cases, Existing Accounts, New Accounts, Analytics, and Customer.
- Branding Preview:** Shows the live preview of the site with the Appian logo, navigation menu, and main content area.
- Dashboard:** Features four key metrics cards: New Account Cases (86, -15%), Active Accounts (92, 18%), Pending Account Cases (57, -7%), and Closed Account Cases (76, 17%). Each card includes a line chart showing trends.
- MY TASKS:** Lists tasks such as 'Managerial Review' with due dates and creation times.
- MANAGED CASES:** A table showing case details, including Case Name, Status, Due Date, and Case Tags.

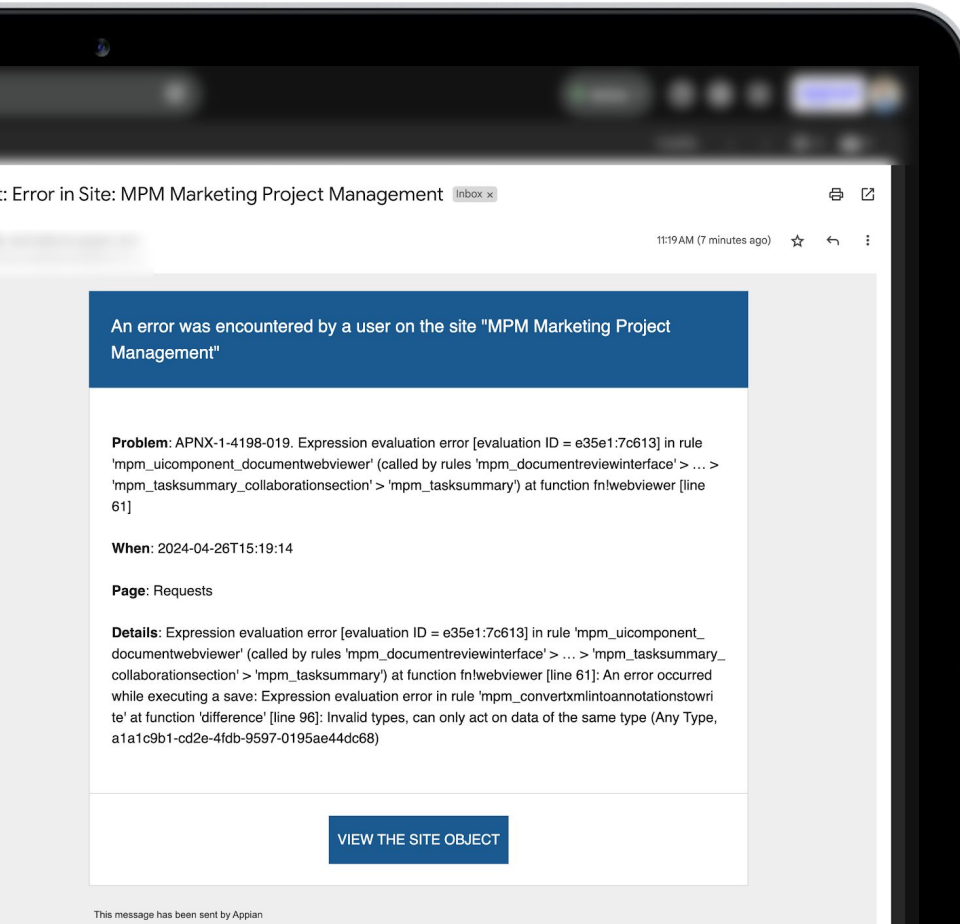
CASE	STATUS	DUE	CASE TAGS
Checking Account Creation <small>Created on May 06, 2023</small>	In Progress	Apr 28, 2024 <small>3d ago</small>	Account Opening Checking
Update Account		May 05,	Account Change

# 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 interface. At the top, a blue header bar contains the portal name and a refresh icon. Below the header, a red-bordered notification banner states: "Republish in progress. Initiated at 4/30/2024 7:39 PM following a change to NSFS\_Portal\_Home made by Francisco Rodrigues". The main interface is divided into two columns. The left column, titled "Configurations", includes a "Published" toggle switch, a "Display Name" field with the value "Finances Portal", and a "Web Address" field with the URL "https://ace-demo.appianportals.com/finances-portal". The right column, titled "Branding Preview", shows a partial view of the portal's user interface, including a navigation menu with "HOME", "SAVINGS", and "CHECKING" options, and a promotional banner for "Your financial pr...". Below the configurations, a "Pages" section lists three page groups: "Home" (NSFS\_Portal\_Home), "Savings" (NSFS\_FinancesPortal\_Savings), and "Checking" (NSFS\_FinancesPortal\_Checking). Each page group has edit, up, down, and delete icons.

# Improved Monitoring with Site Error Emails



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

# New Troubleshoot Tab in Portal Designer

The new **Troubleshoot** tab in the **portal** object provides details about errors, allowing developers to quickly look into issues without leaving the object.

The screenshot displays the Appian Portal Designer interface for an 'ESG Registration' portal. The top navigation bar includes the Appian logo, a 'SAVE CHANGES' button, and a user profile icon. Below the navigation bar, the status 'Published' is shown, along with the last published date and time. The 'Troubleshoot' tab is active, and the 'Errors' section is displayed. The Errors section contains a table of error logs for the date range '04/24/2024 - 05/01/2024'. The Resources sidebar on the right provides links to 'Monitor Portals' and 'View System Activity'.

**ESG Registration**

**Published.** Last published by Francisco Rodrigues at 5/1/2024 12:39 PM.

Build Troubleshoot

## Errors

This grid contains errors that users have encountered on the portal during the selected date range

DATE RANGE | 04/24/2024 - 05/01/2024

To view errors from the selected date range in a log file, download the [Portal Error Log](#)

Time	Page	Error
5/1/2024 12:39 PM	Home	Expression evaluation error [evaluation ID = 1fa0b:4cc31] in rule 'esg_conferencefeedback' at function altextField [line 287]: An error occurred while executing a save: Expression evaluation error: Answer must be indexed by its corresponding record type f... <a href="#">More</a>
5/1/2024 12:39 PM	Registration	Please refresh the page and try again.
5/1/2024 12:38 PM	Home	Expression evaluation error [evaluation ID = 3ba8e:ca3fc] in rule 'esg_conferencefeedback' at function altextField [line 270]: An error occurred while executing a save: Expression evaluation error: Answer must be indexed by its corresponding record type f... <a href="#">More</a>
5/1/2024 12:33 PM	Registration	Expression evaluation error [evaluation ID = 8fb7e:46c35] in rule 'esg_conferencefeedback' at function altextField [line 270]: An error occurred while executing a save: Expression evaluation error: Answer must be indexed by its corresponding record type f... <a href="#">More</a>
5/1/2024 12:33 PM	Registration	Expression evaluation error [evaluation ID = 8fb7e:46c35] in rule 'esg_conferencefeedback' at function altextField [line 270]: An error occurred while executing a save: Expression evaluation error: Answer must be indexed by its corresponding record type f... <a href="#">More</a>
5/1/2024 12:21 PM	Feedback	Please refresh the page and try again.
5/1/2024 12:21 PM	Feedback	Please refresh the page and try again.

## Resources

### Monitor Portals

Monitor portal latency, traffic, and error rate metrics to help identify potential issues related to the response times or availability of your portals. View these metrics for all portals in the environment in the [portal monitoring view](#).

### View System Activity

For further troubleshooting, download the Portal Server Log to view more details about the activity on the published portal during the selected time range

**Time Range**

Last 15 minutes

Limit to 1000 entries

[Download the Portal Server Log](#)

# Rich Text Editing is Here!

The screenshot displays the Appian design studio interface for editing a survey page titled "AFS\_surveyPage". The main workspace shows a "Post Event Survey" form with five questions:

1. What is your name? \*  
Francisco Rodriguez
2. What is your organization? \*  
ACME Solutions
3. What is your email? \*  
francisco.rodriguez@acme.com
4. Styled Text Editor  
Here are some specific topics and sessions that would be of great interest to me:
  - **Future Technology Trends:** Exploring emerging technologies like AI, blockchain, and IoT, and their impact on businesses and society.
  - **Leadership and Management:** Strategies for effective leadership, team building, and organizational management.
  - **Innovation and Creativity:** Techniques for fostering innovation and creativity within teams and organizations.
  - **Digital Transformation:** Case studies and best practices for implementing digital transformation in businesses.
5. In terms of timing for a forum, which timeframe do you prefer? \*
  - Full Day
  - Half day AM
  - Half day PM

The right-hand sidebar contains configuration options for the "Styled Text Editor" component, including "Local Variables", "Component Configuration", "Width" (set to "Automatically distribute"), "Visibility" (set to "Always show"), and "Label" (set to "Styled Text Editor").

# Display Key Data with New KPI Patterns

The screenshot displays the Appian Reports Dashboard interface. The top navigation bar includes the title "SALES\_ReportsDashboard", tabs for "DESIGN" and "EXPRESSION", and buttons for "TEST", "SAVE CHANGES", and user profile. The left sidebar contains a "Palette" with "COMPONENTS", "PATTERNS", and "DESIGN LIBRARY" sections. The main content area is divided into several sections:

- Summary Cards:** Four cards showing "Total Revenue" (\$3,276.91, +18%), "Revenue Per User" (\$374.12, -7%), "New Orders" (1275, -15%), and "New Users" (76, +22%).
- Top Selling Products By Category:** A section with a "Dresses" dropdown and a table of products. A red box highlights the "Ruched Dress" and "KPI With Sparkline" pattern.
- Sales by Region (\$):** A stacked bar chart showing sales across Northeast, Southeast, Midwest, and Southwest regions, categorized by Full Price, Clearance, and Promotion.
- Customer Satisfaction:** A horizontal bar chart showing the distribution of "Not Satisfied", "Neutral", and "Satisfied" responses.
- Customer Acquisition:** A line chart showing "Returning" and "New" customer acquisition over time.
- Top Performing Campaigns:** A table listing campaigns like "Holiday Bundle" and "Free Gift with Purchase" with their respective visits, purchases, and revenue.
- Traffic Sources:** A donut chart showing the distribution of traffic sources.

The "KPI With Sparkline" pattern is highlighted with a red box and includes a tooltip with the following data:

- Total Orders: 947 (+12%)
- Total Sales: \$28,407 (+13%)
- Online Visitors: 4,230 (-23%)

The "Ruched Dress" product card shows a "Low in Stock" status and a "KPI In A Card" pattern with a value of 80. The "KPI With Sparkline" pattern displays a key performance indicator (KPI) and a line chart showing the movement of data over time.

# Easily Move Translation Strings

The screenshot displays the Appian S Home Translations interface. A modal dialog box titled "Move String to Translation Set" is open, allowing a user to move a selected translation string to a different translation set. The dialog includes a dropdown menu currently set to "S Portals Translations" and a confirmation message: "All translation locales for this translation string will be added to the selected translation set." The dialog has "CANCEL" and "MOVE" buttons.

The background interface shows a table of translation strings with columns for English (US) [Primary], Japanese, and Spanish. The "Date Range" string is selected. The table also includes a "Description" column.

	English (US) [Primary]	Japanese	Spanish	Description
<input type="checkbox"/>	Product ID	製品		
<input type="checkbox"/>	Count	カウ		
<input type="checkbox"/>	Date	日付		
<input type="checkbox"/>	Value	価値	valor	
<input type="checkbox"/>	Timeframe Type	タイムフレームタイプ	Tipo de plazo	
<input type="checkbox"/>	Year	年	Año	
<input type="checkbox"/>	Month	月	Mes	
<input type="checkbox"/>	Week	週	Semana	
<input checked="" type="checkbox"/>	Date Range	日付範囲	Rango de fechas	
<input type="checkbox"/>	Financial Summary	財務概要	Resumen financiero	
<input type="checkbox"/>	Purchased	購入した	Comprado	
<input type="checkbox"/>	Top Selling Products By Category	カテゴリ別の売れ筋商品	Productos más vendidos por categoría	
<input type="checkbox"/>	Dresses	ドレス	Vestidos	
<input type="checkbox"/>	Tops	トップス	Tapas	
<input type="checkbox"/>	Dropdown	落ちる	Desplegable	
<input type="checkbox"/>	# of Items Purchased	購入したアイテムの数	# de artículos comprados	
<input type="checkbox"/>	# of Items Returned	返品された商品の数	# de artículos devueltos	
<input type="checkbox"/>	Returned	戻ってきた	Devuelto	



# Detect Matching Translation Strings

The screenshot shows the Appian interface for a 'SALES\_ReportsDashboard'. The dashboard features several key metrics and charts:

- Total Revenue:** \$3,276.91 (▲ \$116.31 (18%))
- Revenue Per User:** \$374.12 (▼ (\$32.25) (-7%))
- New Orders:** 1275 (▼ -116 (-15%))
- New Users:** 76 (▲ 46 (22%))

The 'Add Translation String' modal is open, showing the following details:

- Translation Set:** S Home Translations
- Value:** revenue
- Locale:** English (US)

A warning message states: "Matching translation strings. There are existing translation strings that match the primary locale value of this string. Select an existing string to use or create a new one." Below this is a table of existing strings:

String	Description	Notes for Translator	Dependents
<input type="checkbox"/> Revenue	Revenue refers to the income generated ...	Capture the financial aspect of revenue, ...	1Objects

The modal also includes fields for 'Description' and 'Notes for Translator', and 'CANCEL' and 'ADD' buttons.

# Combine Multiple Instances into One String

**NZC HomeDashboard** DESIGN EXPRESSION TEST SAVE CHANGES addian

## Generate Translation Strings

**Translation Set \***  
NZC Translations

We collected the following user display text from the interface to add as translation strings. This can include dynamic values, which will be added as translation variables in the strings. You can generate up to 50 strings at a time and repeat this process as many times as needed.

Combine duplicate user display text into one translation string. 6 strings

Combine	English (US) [Primary]	Description	Notes for Translator	Use Existing String	
	Journey to			2 Existing Strings	✗
	Net-Zero Carbon			2 Existing Strings	✗
<input checked="" type="checkbox"/>	ACTUAL IMPACT 2 Instances			2 Existing Strings	✗
<input checked="" type="checkbox"/>	MTCO2e 6 Instances			2 Existing Strings	✗
<input checked="" type="checkbox"/>	OFFSET 2 Instances			2 Existing Strings	✗
<input checked="" type="checkbox"/>	NET IMPACT 2 Instances			2 Existing Strings	✗

# Design Guidance for Offline Mobile

When you're designing offline-enabled interfaces, our new design guidance will instantly call out functions that are incompatible.

The screenshot displays the Appian design tool interface for a project titled "NZC\_TechnicianServiceForm\_Resolution". The top navigation bar includes tabs for "DESIGN" and "EXPRESSION", along with icons for help, connectivity, undo, redo, test, and save changes. The Appian logo is visible in the top right corner.

A "RECOMMENDATIONS" panel is open, displaying a warning icon and the text "RECOMMENDATIONS Learn More". Below this, two bullet points provide guidance:

- **Incompatible function used in offline interface.** Refactor the interface to remove functions that are incompatible with offline mobile. Because it is offline-enabled, it may cause errors in Appian Mobile. Locations: aluserbrowserfieldcolumns (lines: 167). [Dismiss](#)
- **Partially compatible function used incorrectly in offline interface.** Refactor this object to follow offline mobile best practices for partially compatible functions. Because it is referenced in an offline-enabled interface, it may cause errors in Appian Mobile. Function(s) partially compatible with offline mobile: user (lines: 163). [Dismiss](#)

The main workspace shows a mobile device mockup with a form titled "Technician Service Review". The form includes a header with the title and a graphic, followed by two text input fields labeled "Investigation Notes \*" and "Repair Notes \*".

On the left side, a "SECTION" panel lists various UI components such as "COLUMNS", "SIDE BY SIDE", "BOX", "CARD", "BILLBOARD", "Inputs", "TEXT", "PARAGRAPH", "INTEGER", "DECIMAL", "DATE", "DATE & TIME", "STYLED TEXT EDITOR", "ENCRYPTED TEXT", "FILE UPLOAD", "SIGNATURE", "BARCODE", and "Selection", "DROPDOWN".

On the right side, a "Signature" panel is visible, showing fields for "Label", "Label Position" (set to "Default"), "Instructions", "Help Tooltip", "Target Folder" (set to "Select a constant"), "File Name", and "File Description".

# 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.

# Data Fabric

Lisa Graham | Sr Product Manager II

# Record Collaboration

The screenshot displays the Appian interface for a campaign titled "Eco-Friendly IT Solutions". The top navigation bar includes the Appian logo and a user profile icon. Below the title, there are tabs for "Summary", "Details", "Leads", "Opportunities", "Orders", and "Related Products".

**Eco-Friendly IT Solutions**

GO-LIVE: April 2024 | END DATE: November 2024 | DAYS LEFT: 205 days

**STRATEGY**

This campaign will focus on promoting our range of eco-friendly IT products, including energy-efficient servers, recyclable peripherals, and sustainably sourced accessories. The strategy involves highlighting the cost savings and environmental benefits of switching to green IT solutions.

We'll use email marketing, targeted social media ads, and blog posts that showcase how businesses can reduce their carbon footprint and energy costs with our products.

**KEY CONTACTS**

- Malcom Ross**, Campaign Manager
- Sam Knecht**, Communications Director

**LIVE METRICS**

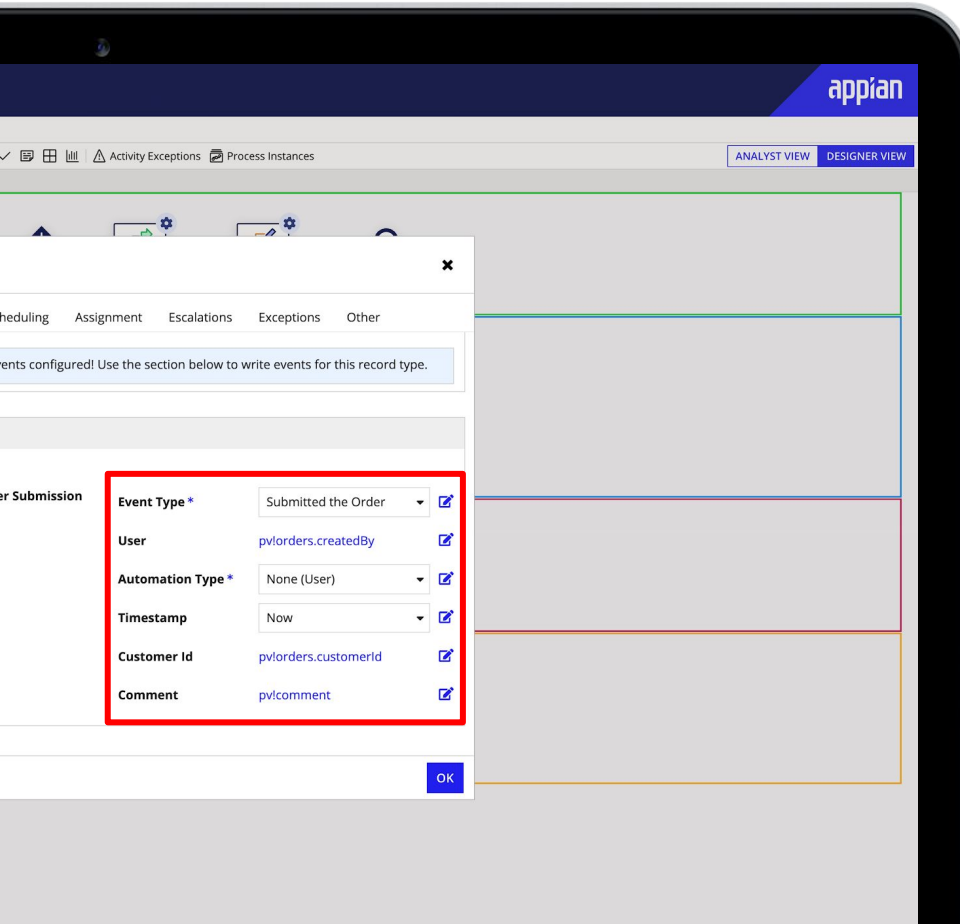
**Views over Time**

Day	Views
1	100,000
2	150,000
3	200,000
4	300,000
5	400,000
6	500,000
7	600,000
8	700,000
9	800,000
10	900,000
11	1,000,000
12	1,100,000

**Comments**

- SK** @James Lee can we get the team together to review branding consistency before finalizing? [CANCEL] [POST]
- JL** James Lee (Apr 11, 2024 2:49 PM) @Sam Knecht could you please update with the latest graphics from the creative team? [Remote Work Essentials]
- System** System Sent Data to HubSpot (Apr 11, 2024 2:24 PM) [Remote Work Essentials]
- AD** Annelise Dubrovsky Generated Leads (Apr 10, 2024 6:25 PM) [Remote Work Essentials]
- MR** Malcom Ross (Apr 07, 2024 6:26 PM) Who's responsible for following up on the leads generated? [Remote Work Essentials]

# Dynamically Write Events per Record



This enhancement will **dynamically calculate** the event field value for **each record** so that the event is recorded individually to reflect each record's data.

# Visualize Record Variable Changes in a Process

We're enhancing the change indicator when visualizing the output variable to make it visually clear what changes were ignored.

The screenshot displays the Appian Process Modeler interface. The main window shows the 'Process Details' for the process 'OF Update Campaign'. The interface includes a menu bar (File, Modify, View), a toolbar with various icons, and a navigation pane on the left. The main content area is a table with columns for Process History, Variables, Process Nodes, Current Tasks, Errors, Sub-Processes, and Quick Tasks. The table lists several process steps, including 'Get Campaign', 'Update Campaign', and 'Write Updated Campaign'. Two rows are highlighted with red boxes, indicating variable changes. The first highlighted row shows a 'Modify Variable' action for the variable 'campaign' performed by 'sam.knecht@appian.com'. The second highlighted row shows a 'Modify Variable' action for the variable 'campaign' performed by 'sam.knecht@appian.com'. The variable details for the first row are expanded, showing a list of properties: 'endDate', 'summary', 'statusId', 'createdBy', 'createdOn', 'modifiedBy', and 'modifiedOn'. The variable details for the second row are also expanded, showing 'status' and 'value' properties.

Process History	Variables	Process Nodes	Current Tasks	Errors	Sub-Processes	Quick Tasks
5/1/2024 6:16 PM		Get Campaign			Complete	System
5/1/2024 6:16 PM		Update Campaign			Start	System
5/1/2024 6:16 PM	campaign	campaign			Modify Variable	sam.knecht@appian.com
5/1/2024 6:16 PM		Update Campaign			Complete	System
5/1/2024 6:16 PM		Write Updated Campaign			Start	System
5/1/2024 6:16 PM	campaign	campaign			Modify Variable	sam.knecht@appian.com
5/1/2024 6:16 PM		Write Updated Campaign			Complete	System

Variable details for the first 'Modify Variable' action:

- endDate 7/26/2024 12:00 AM GMT+00:00 (Date and Time)
- summary "<p>This campaign will focus on promoting our range of eco
- statusId 2 (Number (Integer))
- createdBy sam.knecht@appian.com - Sam Knecht (User)
- createdOn 5/1/2024 6:16 PM GMT+00:00 (Date and Time)
- modifiedBy null (User)
- modifiedOn null (Null)

Variable details for the second 'Modify Variable' action:

- status Campaign Status
- id 1 (Number (Integer))
- value "In Progress" (Text)



# Record Field Display Names and Descriptions

**Map Record Fields**

ORDER\_SUBMISSION\_FINAL: Map source fields to record fields

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Source Field Name	Record Field Name	Source Field Type	Record Field Type	Display Name	Description	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ID	id	INTEGER	Number (Integer)	Id	Record identifier	17/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TYPE	type	VARCHAR(255)	Text	Type	Type of order received	22/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	RECONCILED	reconciled	BIT	Boolean	Reconciled	Has order been reconciled?	26/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EXTRACTION_ID	extractionId	INTEGER	Number (Integer)	Extraction Id	ID for the AI Skill extraction	30/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATUS_ID	statusId	INTEGER	Number (Integer)	Status Id	ID for the status value	23/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PRIORITY_ID	priorityId	INTEGER	Number (Integer)	Priority Id	ID for the priority value	25/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OPPORTUNITY_ID	opportunityId	INTEGER	Number (Integer)	Opportunity Id	ID for the related opportunity	30/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ASSIGNED_EMPLOYEE_ID	assignedEmployeeId	INTEGER	Number (Integer)	Assigned Employee Id	ID for the assigned employee	28/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ORDER_DATE	orderDate	DATE	Date	Order Date	Date the order was received	27/500
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CREATED BY	createdBy	VARCHAR(255)	Text	Created By	Person who submitted the orde	30/500

# Icons Highlight the Sources of your Data Fabric

The screenshot displays the 'Create Data Model' interface in Microsoft Dynamics 365. A modal dialog titled 'Add Relationship to Campaign' is open, showing a search for 'Related Record Type'. The search results list 'Opportunity' (with a Salesforce icon) and 'VOF SF Opportunity' (with an Ad icon). The background interface includes a sidebar with the heading 'How does this record type connect to other data?' and a list of record types: 'orderSubmission' and 'status'. The top right corner shows the 'addian' logo and a 'SAVE CHANGES' button.

**How does this record type connect to other data?**


Relationships allow you to connect your business data.

You can edit these relationships or add more relationships later.










Learn more about relationships [↗](#)

**Related Record Type**

opportunity

-  Opportunity
-  VOF SF Opportunity

**Suggested Record Types**

-  Product Category [↗](#)
-  Order Detail SKU Join [↗](#)
-  Order Submission Event Type [↗](#)
-  Order Submission Event History [↗](#)
-  Inventory [↗](#)
-  Sharepoint Folder [↗](#)
-  SKU [↗](#)
-  Product Subcategory [↗](#)
-  Campaign [↗](#)
-  Product [↗](#)

# Relationships with Custom Record Fields

Now, whenever you create a **sync-time custom record field**, you can specify if the field contains **unique** values, allowing you to use the field in a relationship configuration.

OF Community Login Credential

SAVE CHANGES

addian

## Create Custom Record Field

Select a Template      Configure Values      Set Name and Type

### FIELD PROPERTIES

**Record Field Name**  
username

**Record Field Type**  
Text

**Unique Values** [?](#)  
 Do not allow duplicate values

**Error Value**  
Choose the value to display if there is an error evaluating a custom record field value. Your error value must be the same data type as the custom record field.  
 Null    Custom

**Evaluation**  
Sync-Time

### DISPLAY PROPERTIES

The name and description of the field used in Process HQ

**Display Name**

**TEST**

View Record Data    Enter Test Values   [TEST](#)

id	email	Custom Record Field
1	ethan.johnson@gmail.com	ethan.johnson
2	olivia.smith@gmail.com	olivia.smith
3	liam.brown@gmail.com	liam.brown
4	emma.williams@gmail.com	emma.williams
5	noah.jones@gmail.com	noah.jones
6	ava.garcia@gmail.com	ava.garcia
7	mason.miller@gmail.com	mason.miller
8	sophia.davis@gmail.com	sophia.davis
9	logan.rodriguez@gmail.com	logan.rodriguez
10	isabella.martinez@gmail.com	isabella.martinez

# Write and Delete Records with Unique Keys

The **Write** Records and **Delete** Records smart services now support data models where record type relationships use **unique keys**.

The screenshot shows the Appian Data Model editor interface. The main window displays the 'Edit Relationship with Document Detail' dialog. The 'Relationship Name' field is set to 'documentDetail'. The 'Relationship Type' section shows three options: 'One to Many' (selected), 'Many to One', and 'One to One'. The 'One to Many' option is highlighted with a blue border and a checkmark. Below the relationship type selection, the 'Order Submission' and 'Document Detail' record types are selected, both with 'documentId - Number (Integer)' as the key field. A red box highlights the 'Write and Delete Related Records' section, which has the radio button for 'Write or delete Document Details when modifying Order Submissions' selected. The 'Preview' section at the bottom shows a search field for 'Order Submissions'. The background shows the Appian Data Model editor with a sidebar on the left containing navigation options like 'DATA', 'USER EXPERIENCE', 'SECURITY', and 'MONITORING'. The top right of the interface includes a 'SAVE CHANGES' button, a search icon, and the Appian logo.

# Sort Values for Related Record User Filters

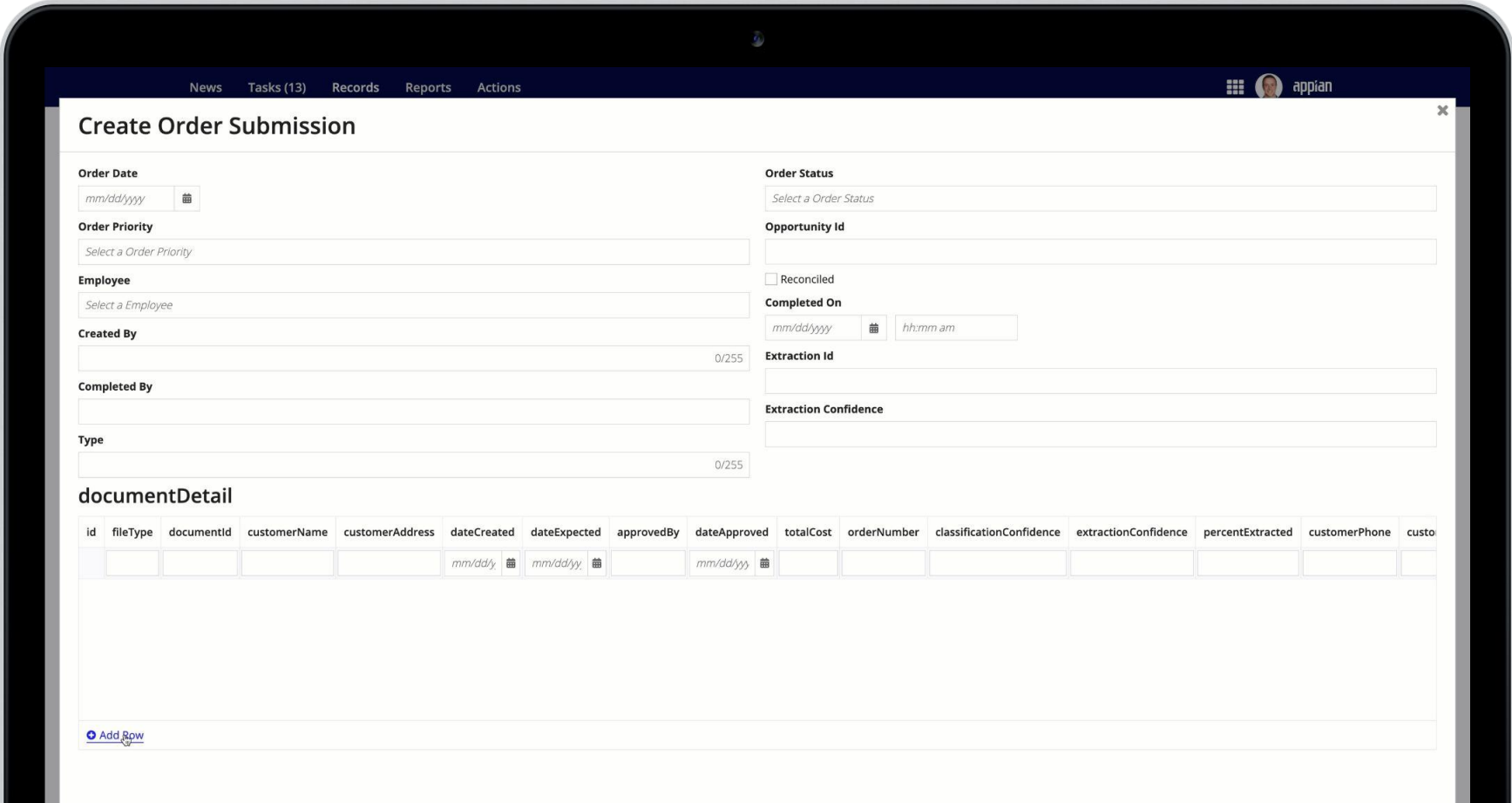
The screenshot shows the Appian interface for configuring a user filter. The main window is titled "Edit User Filter" and is divided into several sections:

- Filter Configurations:** Includes fields for "Name" (Order Status) and "Label" ("Status").
- List Configurations:** Includes a checked option "Users can select multiple options" and radio buttons for "Choice Options" (Selected: "Related record values", Unselected: "Fixed values").
- Option Labels:** A table with one row containing the label "NOT SORTED". A red box highlights this dropdown menu, which also shows "Ascending" and "Descending" options.
- Default Option(s):** A table with one row containing the value "1".

Additional settings include "Type" (Selected: "List", Unselected: "Date Range") and "Visibility" (Selected: "Always", Unselected: "Only show when..."). The dialog has "CANCEL" and "OK" buttons at the bottom.

```
12 * a:TOPeach
13   items: localFieldValues,
14   expression: a!recordFilterListOption(
15     id: fvIndex,
```

# Generate Record Actions with Editable Grids



# Improved Query Performance Monitoring

We are providing even more visibility by allowing you to monitor record queries from a connected environment and a more in-depth view of each query.

The screenshot displays the Appian interface for monitoring a query. The main window is titled "Query 141fbcf7-e653-4a2f-82ea-b42341d1d9fd" and is divided into three sections: Query Syntax, Query Summary, and a table of results.

**Query Syntax**

This is the SAIL expression that represents what the queryRecordType call looks like. If this comes from a GRID, then this is an approximation of the query you'd construct in SAIL to populate the grid.

```
1 a!queryRecordType(
2   recordType: recordType!Order_Submission ,
3   pagingInfo: a!pagingInfo(
4     startIndex: 1,
5     batchSize: 15,
6     sort: {
7       a!sortInfo(
8         field: Order_Submission.dueDateDv ,
9         ascending: true
10      )
11    }
12  ),
13  fields: {
14    Order_Submission.daysActive ,
15    Order_Submission.completedOn ,
16    Order_Submission.totalPrice ,
17    Order_Submission.isActive ,
18    Order_Submission.id ,
19    Order_Submission.assignedEmployeeId ,
20    Order_Submission.isPastDue ,
21    Order_Submission.orderDetail.orderNumber ,
22    Order_Submission.orderStatus.value ,
23  }
```

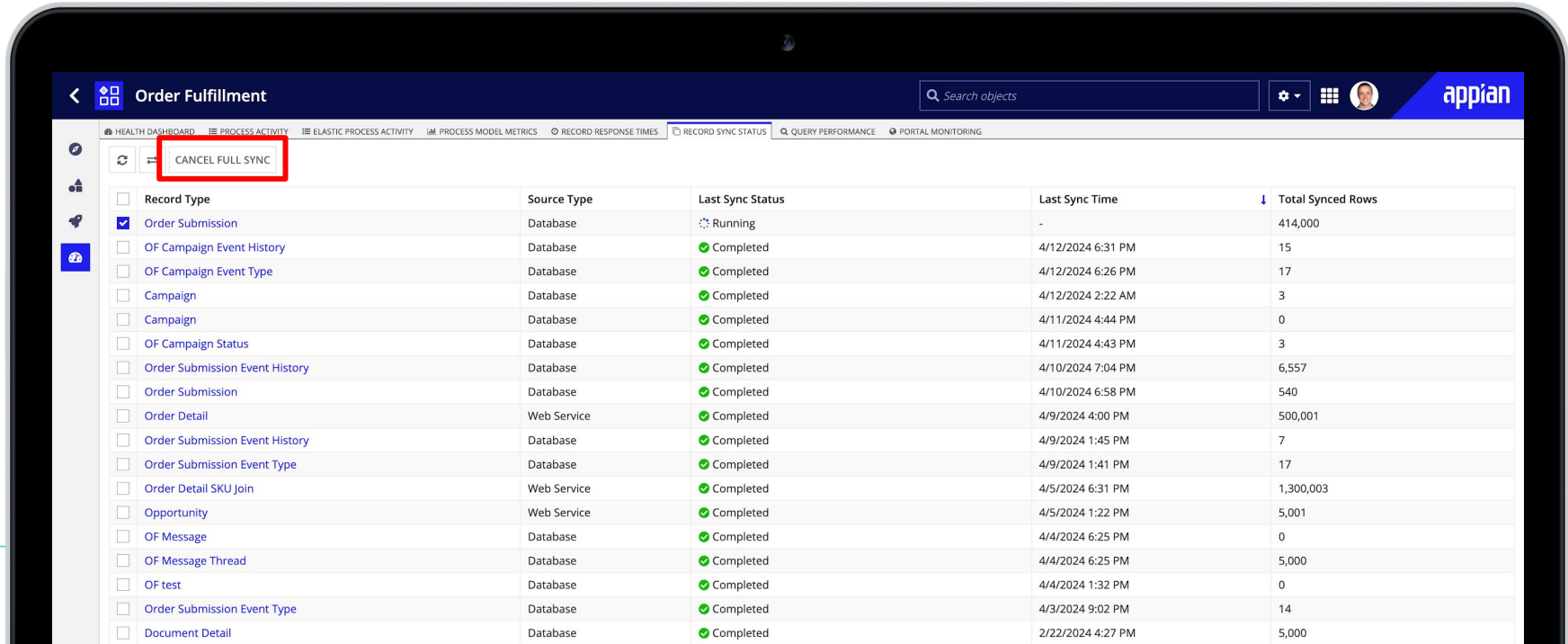
**Query Summary**

Start Time: 4/30/2024 2:28 PM  
Execution Time (ms): 162  
Wait Time (ms): 0  
Started By: elizabeth.barbiato  
Evaluation ID: 6b68c2772e1da132bbc9556036ef10d3  
Interface: OF\_OrderFulfillmentHome  
Expression Rule: OF\_OrdersGrid  
Record Type: Order Submission  
Component: gridField

Expression Rule	Record Type
OrdersGrid	Order Submission
OrderFulfillmentHome	Order Submission
OrderFulfillmentHome	Order Submission
OrderFulfillmentHome	Order Submission
OrderFulfillmentHome	Employee
OrderFulfillmentHome	Order Priority
OrderFulfillmentHome	Order Submission
OrderFulfillmentHome	Order Submission
OrderFulfillmentHome	Order Submission
HomeCalendar	Order Submission
OrderFulfillmentHome	Order Status
CampaignDashboard	Campaign

# Cancel Full Record Syncs in One Click

We're giving you more control over the status of your full syncs by allowing you to **cancel** them at any time and simply reuse data from the last full sync.



The screenshot displays the Appian interface for 'Order Fulfillment'. The top navigation bar includes a search bar and the Appian logo. Below the navigation bar, there are several tabs: HEALTH DASHBOARD, PROCESS ACTIVITY, ELASTIC PROCESS ACTIVITY, PROCESS MODEL METRICS, RECORD RESPONSE TIMES, RECORD SYNC STATUS (selected), QUERY PERFORMANCE, and PORTAL MONITORING. A red box highlights a 'CANCEL FULL SYNC' button located above the table. The table lists various record types, their source types, last sync status, last sync time, and total synced rows.

Record Type	Source Type	Last Sync Status	Last Sync Time	Total Synced Rows
<input checked="" type="checkbox"/> Order Submission	Database	Running	-	414,000
<input type="checkbox"/> OF Campaign Event History	Database	Completed	4/12/2024 6:31 PM	15
<input type="checkbox"/> OF Campaign Event Type	Database	Completed	4/12/2024 6:26 PM	17
<input type="checkbox"/> Campaign	Database	Completed	4/12/2024 2:22 AM	3
<input type="checkbox"/> Campaign	Database	Completed	4/11/2024 4:44 PM	0
<input type="checkbox"/> OF Campaign Status	Database	Completed	4/11/2024 4:43 PM	3
<input type="checkbox"/> Order Submission Event History	Database	Completed	4/10/2024 7:04 PM	6,557
<input type="checkbox"/> Order Submission	Database	Completed	4/10/2024 6:58 PM	540
<input type="checkbox"/> Order Detail	Web Service	Completed	4/9/2024 4:00 PM	500,001
<input type="checkbox"/> Order Submission Event History	Database	Completed	4/9/2024 1:45 PM	7
<input type="checkbox"/> Order Submission Event Type	Database	Completed	4/9/2024 1:41 PM	17
<input type="checkbox"/> Order Detail SKU Join	Web Service	Completed	4/5/2024 6:31 PM	1,300,003
<input type="checkbox"/> Opportunity	Web Service	Completed	4/5/2024 1:22 PM	5,001
<input type="checkbox"/> OF Message	Database	Completed	4/4/2024 6:25 PM	0
<input type="checkbox"/> OF Message Thread	Database	Completed	4/4/2024 6:25 PM	5,000
<input type="checkbox"/> OF test	Database	Completed	4/4/2024 1:32 PM	0
<input type="checkbox"/> Order Submission Event Type	Database	Completed	4/3/2024 9:02 PM	14
<input type="checkbox"/> Document Detail	Database	Completed	2/22/2024 4:27 PM	5,000



# Faster Full Record Syncs



***SPEED UP!***

Full record syncs are now **6x faster!**

Having **up-to-date data** is an essential part of application development.

# Automation

Gabby Rothschild | Sr Product Manager

# Version History for Robotic Tasks [RPA 9.11]

Version history for robotic tasks is available now! Easily **explore** past versions, **update** to the latest, or **delete** unnecessary ones—all in Appian Designer.

The screenshot displays the Appian Designer interface for a robotic task named "OF\_SubmitCheckBookOrder". A "Versions" dialog box is open, showing a table of task versions. The dialog includes filters for "Created By", "From", and "To" dates, and a "Clear Filters" button. The table lists versions 4 through 8, with the "Latest" version being the most recent. Each version entry includes the name, description, creation time, and creator, along with a red 'X' icon for deletion.

Version	Name	Description	Created	
Latest	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:08 PM by Admin User	✗
8	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:07 PM by Admin User	✗
7	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:07 PM by Admin User	✗
6	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:07 PM by Admin User	✗
5	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:07 PM by Admin User	✗
4	OF_SubmitCheckBookOrder	Robotic task to submit a checkbook order excel file into t...	5/2/2024 2:07 PM by Admin User	✗

# 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.

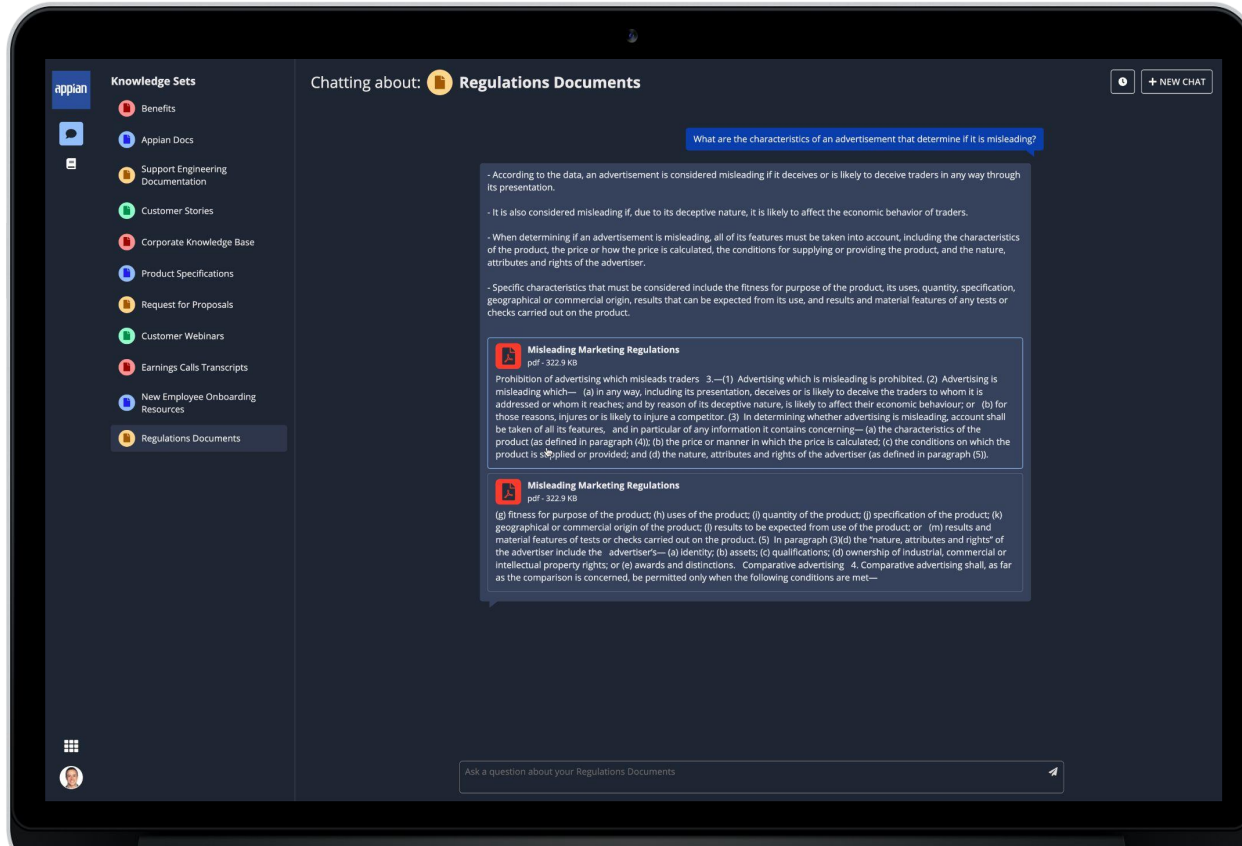
Now, whether you're cloud-based or self-managed, you can use Appian RPA to free up your workforce.

# appian



# kubernetes

# Empower Business Users with Enterprise Copilot



# Fine-Tune Records Chat with Instructions



The screenshot displays the Appian interface for a record form titled "OF\_OrderSubmissionSummary". The form is in "DESIGN" mode and shows a record with the following details:

- Customer Information:** Name: Nexus Holdings, Address: 23 Blaine Road Seattle, Washington, Region: Central USA, Tier: Bronze. Key contacts include Freeman Sonschein, Cherri Mourbey, and Milena Mucklow.
- Map:** A map showing the location of the address in Seattle, Washington.
- Details:** Status: Received, Priority: Medium, Due: 7/3/2024, Assignee: Sam Knecht, Total Price: \$41.95.
- Products Purchased:** A table with columns: PRODUCT, SKU, CATEGORY, QUANTITY, TOTAL PRICE.

PRODUCT	SKU	CATEGORY	QUANTITY	TOTAL PRICE
InfinityLink Horizon	ILH-543289	Electronics	3	\$26.97
Lounge Chair	LC-5674321	Home & Kitchen	2	\$14.98
- Documents:** A PDF document titled "PO\_#4989.PDF" is attached.

On the right side, there is a "Records Chatbot" window. The chat history shows a question: "What is the current inventory status for the products purchased in this order?". The chatbot's response is: "The current inventory status for the products purchased in this order are: - InfinityLink Horizon (SKU Id: 2; - Inventory Location 1 (Id: 3): Quantity On Hand: 75, Quantity Reserved: 4, Total Quantity: 87, Stock Status: In Stock - Inventory Location 2 (Id: 4): Quantity On Hand: 30, Quantity Reserved: 2, Total Quantity: 37, Stock Status: In Stock - Lounge Chair (SKU Id: 16; - Inventory Location 1 (Id: 32): Quantity On Hand: 75, Quantity Reserved: 5, Total Quantity: 93, Stock Status: In Stock - Inventory Location 2 (Id: 33): Quantity On Hand: 40, Quantity Reserved: 3, Total Quantity: 50, Stock Status: In Stock".

Below the chat window, there is a section for "Additional Instructions" which contains the instruction: "Format the output in a bulleted list". This section is highlighted with a red box.

# 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**

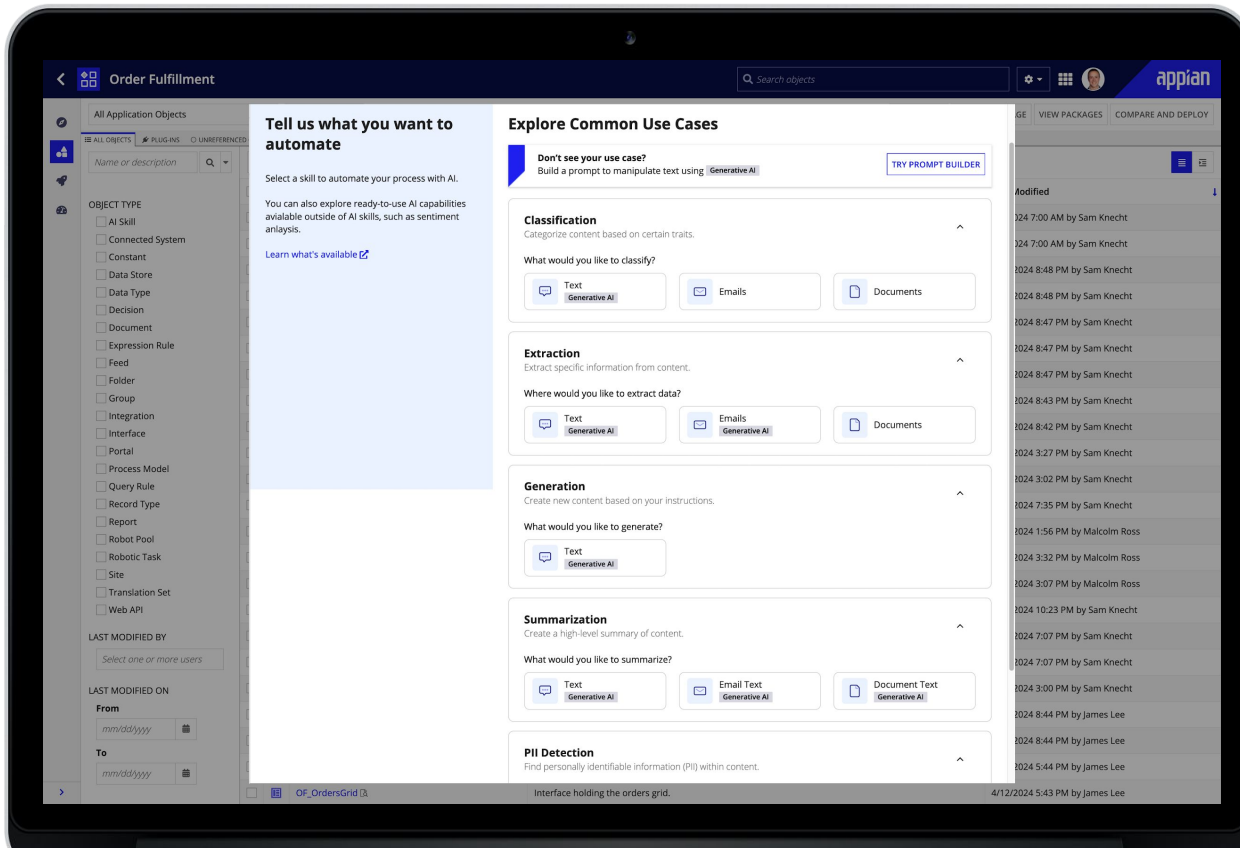
**PII Extraction  
from Text**

**Text  
Extraction**

**Text  
Generation**

**Text  
Classification**

# New Creation Experience for AI Skills





# Multiple AI Skills Obtain FedRAMP Moderate

appian



FedRAMP

**Document  
Classification**

**Document  
Extraction**

**Email  
Classification**

# Expanded Regions for Prompt Builder AI Skill



Customers in **unsupported regions** can **opt in** and choose which region their data is sent to for processing.

# Appian Generative AI Availability

Region	Current Availability
US West (Oregon, us-west-2)	<b>YES</b>
US East (N. Virginia, us-east-1)	<b>YES</b>
Europe (Frankfurt)	<b>YES</b> (Except Enterprise Copilot)
Asia Pacific (Sydney)	<b>In Progress</b> (AI Skills, Developer Copilot)
Europe (Paris)	<b>In Progress</b> (AI Skills, Developer Copilot)

\*\*Regions not listed have the option to enable cross-region support

# Appian AI Pricing

Gen AI Features	Standard	Advanced	Premium
AI Copilot for Developers <sup>2, 5</sup>	✓ via promo	✓	✓
AI Copilot for Business Users <sup>5</sup>	✓ via promo	✓	✓
AI Skills with Generative AI <sup>5</sup>	✓ via promo	✓	✓
Gen AI Tokens included in base price	via promo 100M per month	200M per month	500M per month
IDP AI Features	Standard	Advanced	Premium
AI Skills with Intelligent Document Extraction <sup>2,3</sup>		✓ 20,000 pages per month	✓ 50,000 pages per month
AI Skills with Email and Document Classification		✓	✓

NOTE: Gen AI token usage is audited against license annually, allowing for monthly variability.

# AI Pricing: Where does Token Usage Apply?

## Generative AI Skills

Document Classification	Document Extraction	Email Classification
PII Extraction from Document	Email Summarization	Email Extraction
Text Summarization	PII Extraction from Text	Text Extraction
Document Summarization	Unstructured Document Extraction	Gen AI Prompt Builder
Text Generation	Text Classification	PII Extraction from Email

## Business Copilot



**Enterprise Copilot**

**Records Chat**

**Data Fabric Insights Copilot**

## Developer Copilot

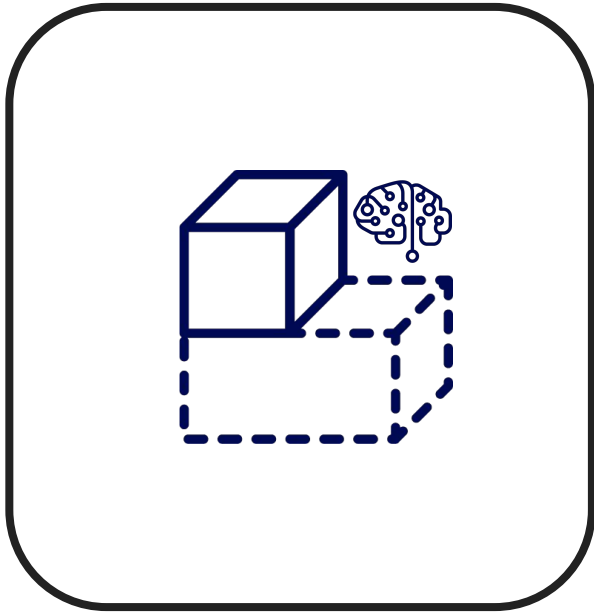


**Generate Record Data**

**Generate Test Cases**

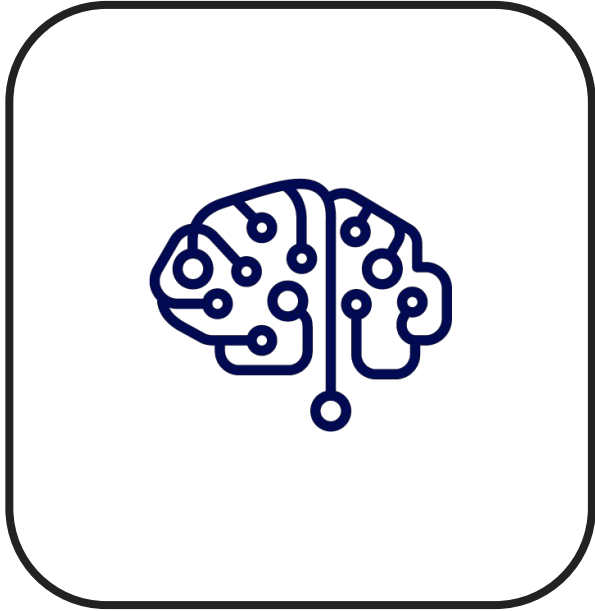
*Generate Form from PDF  
(Future)*

# Generative AI Development Access



Appian will enable Generative AI features on in any customer's **development environment** upon request via a support ticket.

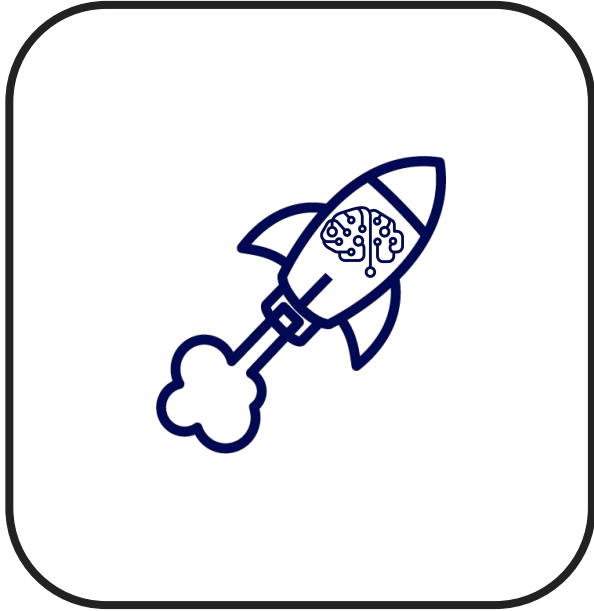
# Generative AI for New and Existing Customers



All customers who sign a Standard-tier license will get access to Generative AI features for the duration of their initial term with 100M tokens per month.

Existing customers can receive Generative AI until the end of their term or upto 12 months.  
(shortest period applies)

# AI Kick-Start



AI Kick-Start is a one-month AI consultancy service for existing customers at a fixed price of **\$30,000**, designed to facilitate and accelerate the integration of Generative AI into their process automation applications.



# Process Intelligence

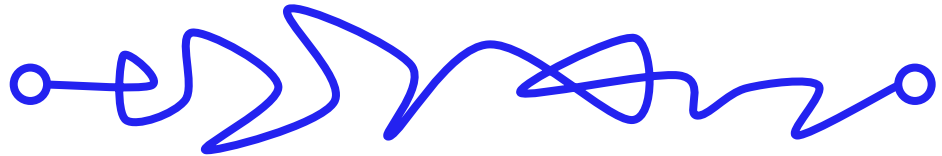
Kelsey Ross | Sr Product Manager II

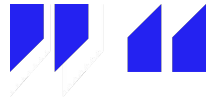
# Lack of Process Transparency Creates Inefficiencies and Risks

What you think your process looks like.



How your process actually looks.





65% of decisions made are **more complex** (involving more stakeholders or choices) than they were two years ago. The current state of decision making is **unsustainable**.

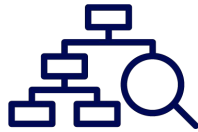
**Gartner**<sup>®</sup>

How to Make Better Decisions

# Challenges for Driving Change in Business



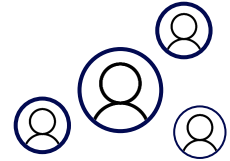
Limited process  
knowledge



Identifying  
automation  
opportunities



Limited technology  
awareness



Departmental silos  
and change  
management

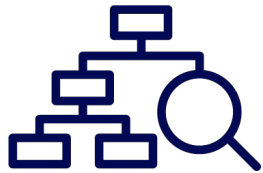


**More than half** of enterprises target end-to-end automation with **process intelligence.**

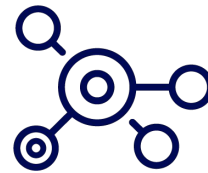
**FORRESTER**<sup>®</sup>

Predictions 2024: Automation Pragmatic LLMs, Alternative Process Roadmaps, And Automation Risk Analysis Define 2024

# Process Intelligence



**Process Data**



**Business Data**

# Process HQ

## Discover

Enterprise data and processes.

## Improve

With automated process insights.

## Achieve

Intelligent process optimization.



# Continuously Improve your Business Operations



## Increase Productivity

Reduce process throughput times.



## Improve Experience

Drive customer satisfaction with better processes.



## Reduce Risk

Create reliable and standardized processes.



## Lower Costs

Find optimal resource and capital allocation.



# Process HQ

# Process HQ: Mission Control for your Business

Continuously improve with **automated**, **accessible**, and **actionable insights**.

The screenshot displays the Appian Process HQ interface on a tablet. The top left corner features the Appian logo and the title "Process HQ". Below the title, a subtitle reads "Explore your data fabric and business processes so you can make strategic, data-driven decisions".

The main content area is divided into several sections:

- EXPLORE YOUR PROCESSES**: This section includes a card for "Order Management" with a status of "Update Successful" and "540 cases".
- EXPLORE YOUR DATA FABRIC**: This section contains four cards representing different data sources: "Order Submissions" (6 total sources), "Cases" (1 total source), "Customers" (4 total sources), and "SAP SKUs" (2 total sources).
- REPORTS AND DASHBOARDS**: This section features a search bar, filters for "TYPE" and "LAST MODIFIED", and a "CREATE DASHBOARD" button. Below this is a table listing reports and dashboards.
- Recently Opened**: This section shows a list of recently opened reports, including "Overdue Orders in the Last 3 Mon..." and "Order History".

Name	Description	Last Modified
Order Priorities by Quarter		James Lee 4/10/2024 11:10 AM
Order History	Number of orders by quarter.	Jacob Rank 4/9/2024 9:29 AM

# Process HQ and Case Management Studio

The screenshot displays the Appian Case Management Studio interface. On the left, there are navigation tabs for 'WORKSPACE', 'CASES', 'DASHBOARDS', 'SEARCH', and 'REPORTS'. Below these are sections for 'Quick Actions' (Submit Case, Create Entry, Manage Reports, Manage Task Details) and 'Recent Activity'. The main area is titled 'My Cases' and shows a list of cases with columns for 'Task', 'Status', 'Case', and 'Due'. A 'My Tasks' section is also visible. On the right, there are 'Expected to Meet Deadline' gauges (62% and 77%), a 'Due Dates' calendar for April 2024, and a 'Recent Activity' list.



The screenshot displays the Appian Process HQ dashboard. At the top, there are navigation tabs for 'SUMMARY', 'DISCIPLINE DASHBOARD', 'CASE LIST', 'CUSTOM KPIs', and 'INVESTIGATOR'. The main area features several KPI cards: 'Total Cases' (2,105), 'Average Case Duration' (1wk, 2d), 'Median Case Duration' (4d, 8h), 'Unique Activities' (13), and 'Automation Rate' (33%). Below these are 'Custom KPIs' cards for 'SLA Violations' (9.03%), 'Median Duration' (4d, 8h), 'Open / Closed / Suspended' (17h, 34m), 'Number Orders' (975), 'Customer Satisfaction' (71.29 / 100), and 'Avg Order Size' (5,256.38 / USD). A 'PROCESS DIAGRAM' section shows a flowchart with nodes and transitions, and a 'PROCESS DIAGRAM' legend below it. The bottom of the dashboard includes 'Activity Frequency' and 'Sequence Frequency' visualizations.

Webinar

# Process Intelligence Made Easy: The Key to Better Business Decisions



**Karina Buschsieweke**  
Director of Product Strategy, Appian



**Renee Hayter-Cotter**  
Product Manager, Oscar Health

appian  
24.2

**Register to watch live or get the recording.**



**Americas**  
June 20  
12:00 p.m. EDT



**EMEA**  
June 20  
12:00 p.m. BST



**APJ**  
June 20  
12:00 p.m. AEST

# Administration

James Lee | Director, Product Evangelism

# Update Credentials for Connected Systems



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

# Custom Parameters in OAuth Token Requests

The screenshot shows the Appian interface with a 'Create Connected System' dialog box open. The dialog is for a system named 'OF MyBank API'. It includes fields for Description, System Logo, Base URL (https://auth.mybank.com/oauth/token), and Authentication (OAuth 2.0: Client Credentials Grant). The 'Configure Authorization' section shows Client ID (b8a2f9e7-1c3d-4a6b-a9c8-09876abcdefg), Client Secret (masked), and Scope (readwrite). The 'Token Request Endpoint' is https://auth.mybank.com/oauth/token. The 'Additional Parameters' section, highlighted with a red box, contains a table with two entries:

Name	Value	
bank_subject_type	Account Holder	x
bank_subject_id	AH304253345	x

Below the table is an 'Add Parameter' link and an 'AUTHORIZE' button. At the bottom of the dialog are buttons for 'GO BACK', 'CANCEL', 'USE IN NEW INTEGRATION', and 'CREATE'.

# Shorter Minimum Idle Session Timeouts

We have reduced the minimum idle session timeout for Appian users to **10 minutes**, allowing you to comply with your organizational security policies.

The screenshot displays the Appian Administration Console interface. The top navigation bar includes the Appian logo, a search icon, and buttons for 'EXPORT' and 'IMPORT'. The left sidebar lists various system settings categories: SYSTEM (Branding, Data Retention, File Upload, Internationalization, Mobile, Permissions, Plug-ins, Portals, Sign-in Page Links, Typefaces, User Start Pages), AUTHENTICATION (Appian >, LDAP, Maintenance Window, OpenID Connect, PIEE, SAML, Users, Web API Authentication), and DEVOPS.

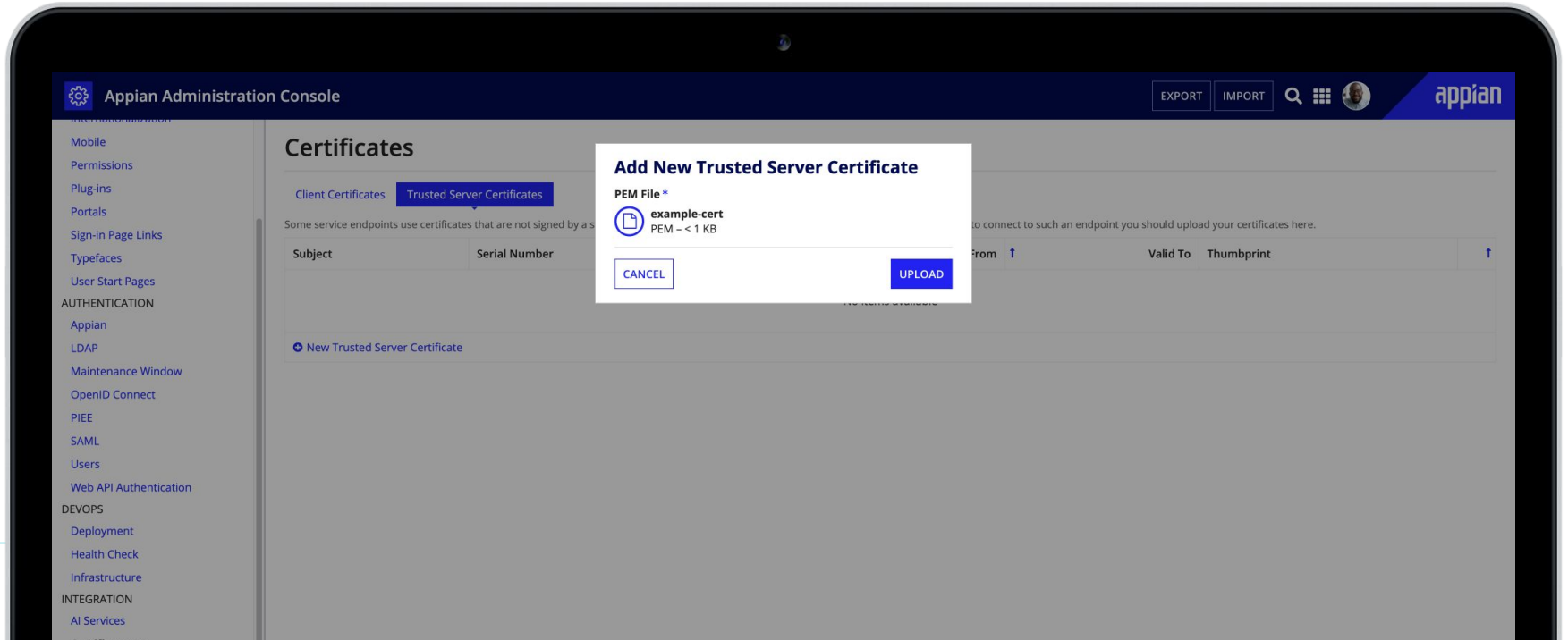
The main content area is titled 'Remember Me' and contains the following settings:

- Remember Me**
  - Enable Remember Me
  - Only applies to Appian authentication
  - Maximum Remember Me Time (Days) \***  
30
  - Specify the number of days after last login that a user will be remembered. The maximum allowed value is 90 days.
- Session Timeout** (highlighted with a red box)
  - Idle Session Timeout (Minutes) \***  
10
  - Specify the number of minutes of inactivity before a session expires. The maximum allowed value is 480 (8 hours). The minimum allowed value is 10.
- Password Expiration**
  - Expire Passwords
  - Maximum Password Age (Days) \***  
90
  - How long a user can keep a password before it must be changed
  - Warn Users Before Password Expiration
  - Expire Temporary Passwords
  - Maximum Temporary Password Age (Minutes) \***  
480
  - The number of minutes after which to expire a temporary password
- Forgot Password**
  - Enable Forgot Password from Sign-In Page
  - When enabled, a link will appear on the Appian sign-in page that allows users who have forgotten their password to send themselves a password reset email. Only users authenticating through Appian (not LDAP or SAML) will receive password reset



# Self-Signed Certificates for LDAPS

You can now use **self-signed certificates** for secure connections to LDAPS by adding your certificates as trusted server certificates in the Admin Console.



The screenshot displays the Appian Administration Console interface. The top navigation bar includes the Appian logo, user profile, and utility buttons (EXPORT, IMPORT, search, and grid). The left sidebar lists various administrative categories such as Internationalization, Mobile, Permissions, Plug-ins, Portals, Sign-in Page Links, Typefaces, User Start Pages, AUTHENTICATION (Appian, LDAP, Maintenance Window, OpenID Connect, PIEE, SAML, Users, Web API Authentication), DEVOPS (Deployment, Health Check, Infrastructure), and INTEGRATION (AI Services).

The main content area is titled "Certificates" and features two tabs: "Client Certificates" and "Trusted Server Certificates". The "Trusted Server Certificates" tab is active. Below the tabs, a text block states: "Some service endpoints use certificates that are not signed by a... to connect to such an endpoint you should upload your certificates here." Below this text is a table with columns for "Subject", "Serial Number", "Valid To", and "Thumbprint". A "New Trusted Server Certificate" link is visible below the table.

A modal dialog titled "Add New Trusted Server Certificate" is overlaid on the screen. It contains a "PEM File\*" field with a file icon and the text "example-cert" and "PEM - < 1 KB". The modal has "CANCEL" and "UPLOAD" buttons.

# 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.



# Appian JDK Upgraded to Java 17

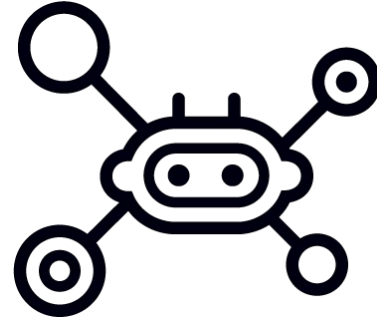
Appian has been upgraded from OpenJDK8 to **OpenJDK17**. This change allows all plug-in authors to now use Java17.



# Upgrade RPA to Java 17

Beginning with **RPA 9.12**, agents will require the use of **Java 17**.

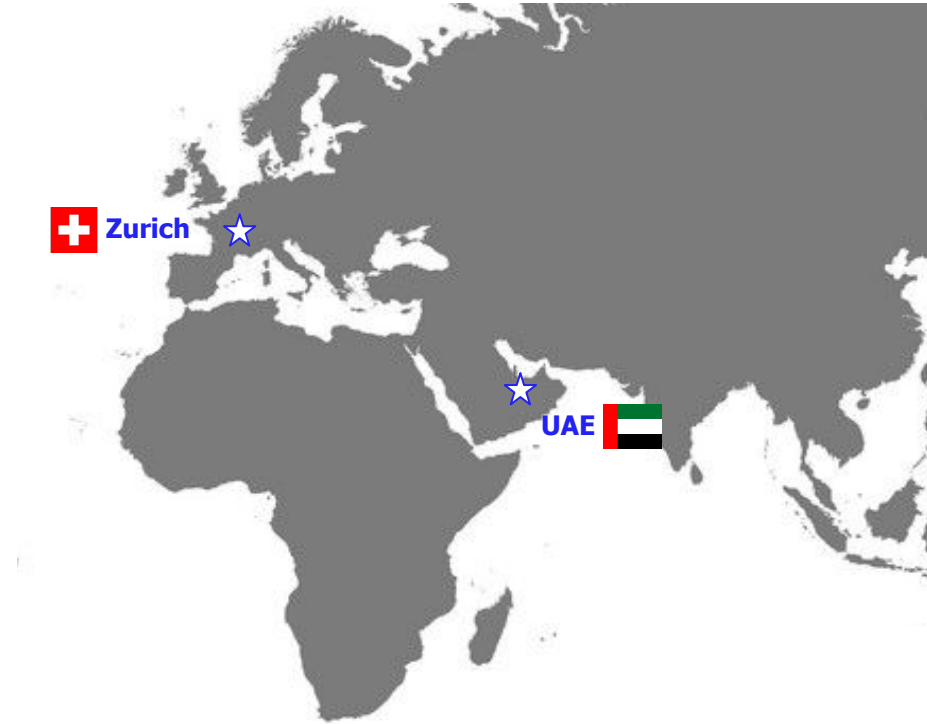
To ensure RPA continues to operate smoothly, upgrade to Java 17 **before August 2, 2024**, in preparation for the RPA 9.12 release.



# Appian Cloud in Zurich and UAE

Zurich and UAE are new Appian Cloud Regions supporting High Availability.

With these new regions, Appian now covers **24 regions** globally, with **72 availability zones**.



# Self-Serve Health Check Credentials with MyAppian

Authorized Support Contacts can now create new Health Check credentials or reset the password for an existing Health Check account **directly in MyAppian**

The screenshot shows the MyAppian user interface for managing Health Check Credentials. The top navigation bar includes 'HOME', 'SUPPORT', 'HEALTH' (highlighted), and 'ADOPTION'. A user profile icon and the 'appian' logo are in the top right. Below the navigation is a 'SAVE DRAFT' button. The main heading is 'Health Check Credentials'. A blue information banner states: 'To use this feature, you must be able to receive emails from forum@appian.com'. Below this is a dropdown menu for 'Organization \*' with 'Appian Corporation' selected and a 'SEARCH FOR ACCOUNT' button. A green checkmark message indicates a Health Check account with a specific username was found and offers a 'Reset' option. A yellow warning message states: 'This account's credentials were created or reset recently (12 days ago by [redacted]). Resetting them again will invalidate their current credentials.' To the right, there is a section for 'Reset History for Appian Corporation' with a note: 'This grid does not contain history from before the Self-Service Health Check Credentials feature was made available.' Below this note is a table with columns 'Reset By' and 'Date and Time', containing two rows of redacted data. At the bottom left is a 'CANCEL' button and at the bottom right is a 'RESET' button.

HOME SUPPORT **HEALTH** ADOPTION

appian

SAVE DRAFT

## Health Check Credentials

To use this feature, you must be able to receive emails from forum@appian.com

Organization \*  
Appian Corporation SEARCH FOR ACCOUNT

✓ A Health Check account with username [redacted] was found. If you'd like to reset its password, please click "Reset."

⚠ This account's credentials were created or reset recently (12 days ago by [redacted]). Resetting them again will invalidate their current credentials.

Reset History for Appian Corporation  
This grid does not contain history from before the Self-Service Health Check Credentials feature was made available.

Reset By	Date and Time
[redacted]	[redacted]
[redacted]	[redacted]

CANCEL RESET

# Beta Programs

Elizabeth Hall | Sr Beta Program Manager

# Autoscaling for High-Throughput Processes



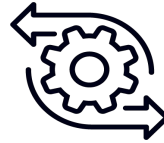
**>1B**

process actions in a  
day



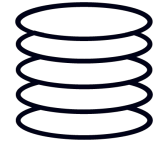
**85%**

less execution  
overhead



**55%**

more compute  
efficient

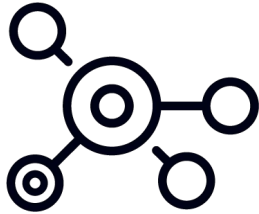


**80%**

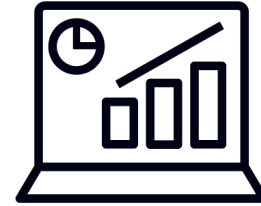
less memory  
usage



# Data Service Enhancements

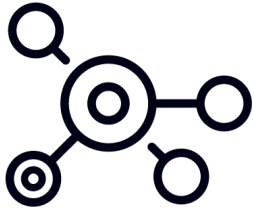


**Estimated 10x faster for  
complex queries**



**Support for 10  
million rows!**

# Appian 3D+



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



**Any File**



**Anywhere**

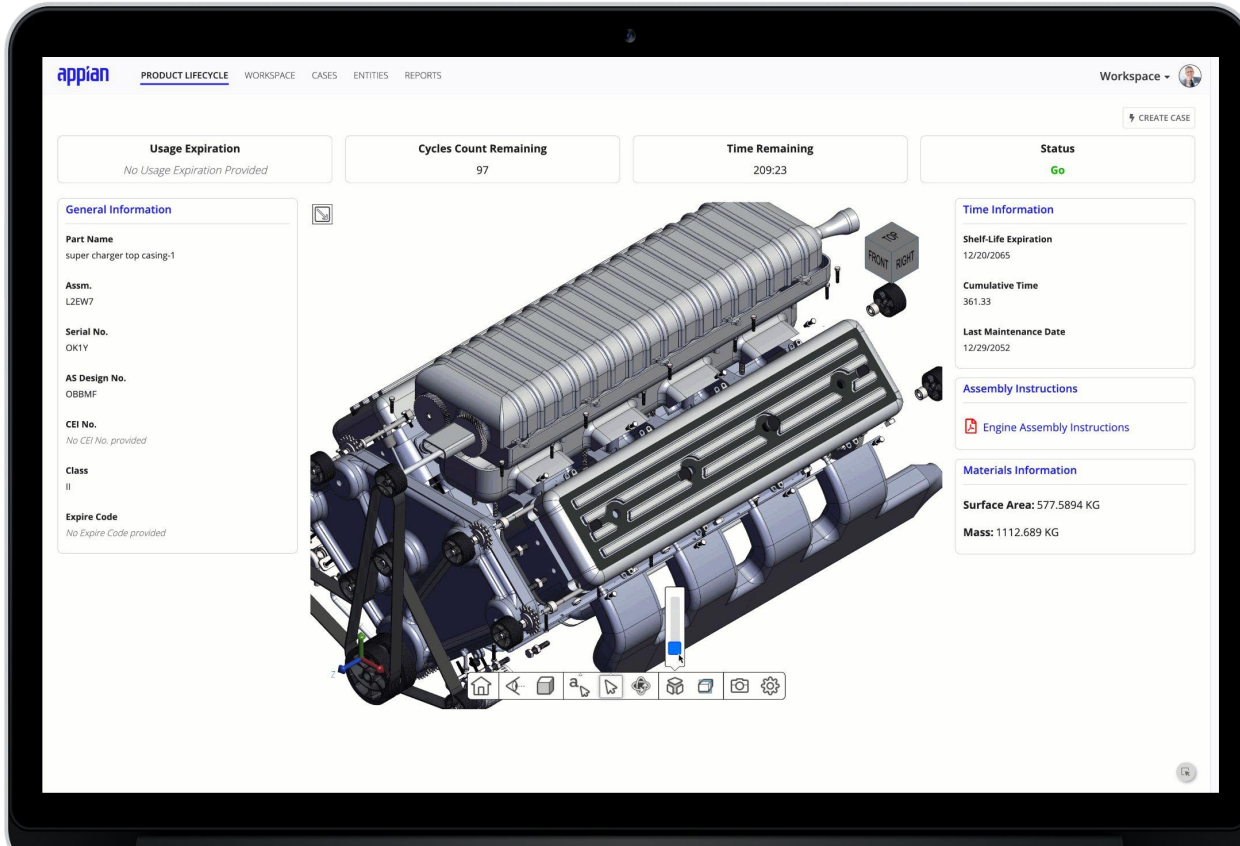


**Securely**

# Appian 3D+ Demo

Brooks Watson  
Product Strategy Software Engineer II

# Develop New Interface Components with the UISDK



# Community

April Schuppel | Lead Developer Advocate

# Appian World 2024 Dev Day recap

4.59 / 5 - How likely are you to recommend Dev Day to a colleague?

"Thank you so much! I would not have been able to come to Appian World otherwise since it's mostly business focused!"

"Loved the one-on-one interaction with Product."

"Thank you for making Dev Day a thing. I think the Appian community is a very strong, tight-knit community and being able to mingle and learn from my fellow devs is a highlight!"

"I think next year you should add additional opportunities for the participants to network. Keep adding more content and options."

"Hands-on workshops are great and the guides are a nice reference!"



# Dev Day Tech Talks by Community Experts



**Amit Chauhan**  
Macedon Technologies



**Andrew Zysk**  
Macedon Technologies



**Jim Schweitzer**  
M&T Bank



**George Liviu  
Catuneanu Cica**  
Macedon Technologies



**Mathieu Drouin**  
Division 61



**Michael D'Itri**  
TELUS



**Tarang Khandpur**  
Macedon Technologies



**Stefan Helzle**  
Bechtle

# Appian World 2024 Community Hub w/ LBC qualifying rounds

Thank you, devs, for stopping by!

## Success with Appian station

- 191 Appian Developer Certification exam vouchers distributed
- 2 Annual Academy LearnPass raffles won (\$9k value each)

## Live Product Demo stations

- Process HQ, Case Management Studio, AI, and more!

## “Mini” Live Build Challenge stations

- 4 LBC team qualifying round competitions on Tues
- Self-serve experience available on Wed





# 2024 Appian World Live Build Challenge

## KPMG



**Hilmon He**  
VA, USA  
Lead Certified



**Justin Yon**  
VA, USA  
Lead Certified



**Shannan McNamee**  
VA, USA  
Lead Certified

## NavLabs



**Casey Frederick**  
NJ, USA  
Senior Certified



**Haley Finegan**  
VA, USA  
Lead Certified



**Juliana Boyle**  
NY, USA  
Lead Certified

## Deft Consulting



**Aby Amores**  
Ecuador  
Lead Certified



**Carolina Erazo**  
Ecuador  
Lead Certified



**Eduardo Bayas**  
Ecuador  
Lead Certified

## Individuals (Team Spectrum)



**Akshar Chauhan**  
3E  
India  
Associate Cert.



**Jordan Donnelly**  
dnata  
United Kingdom  
Lead Certified

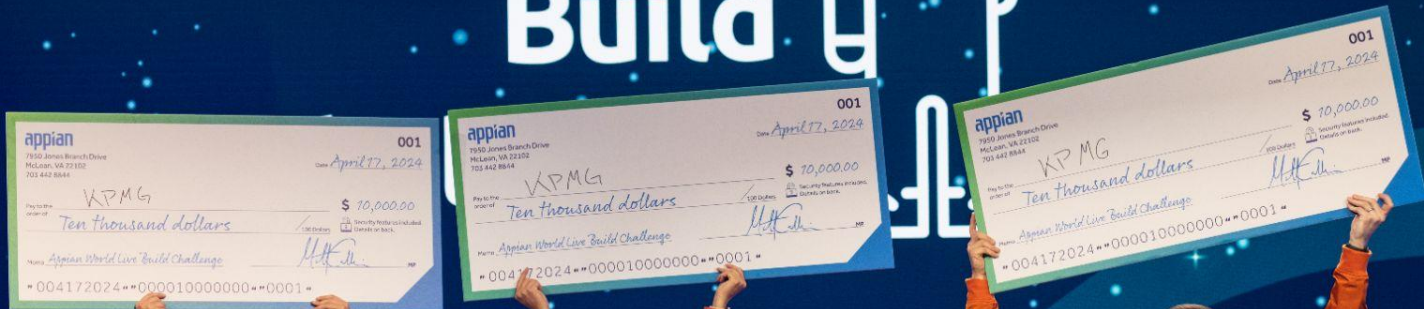


**Harshit Bumb**  
Appyzie  
India  
Lead Certified

# Appian World 2024 Live Build Challenge Finale

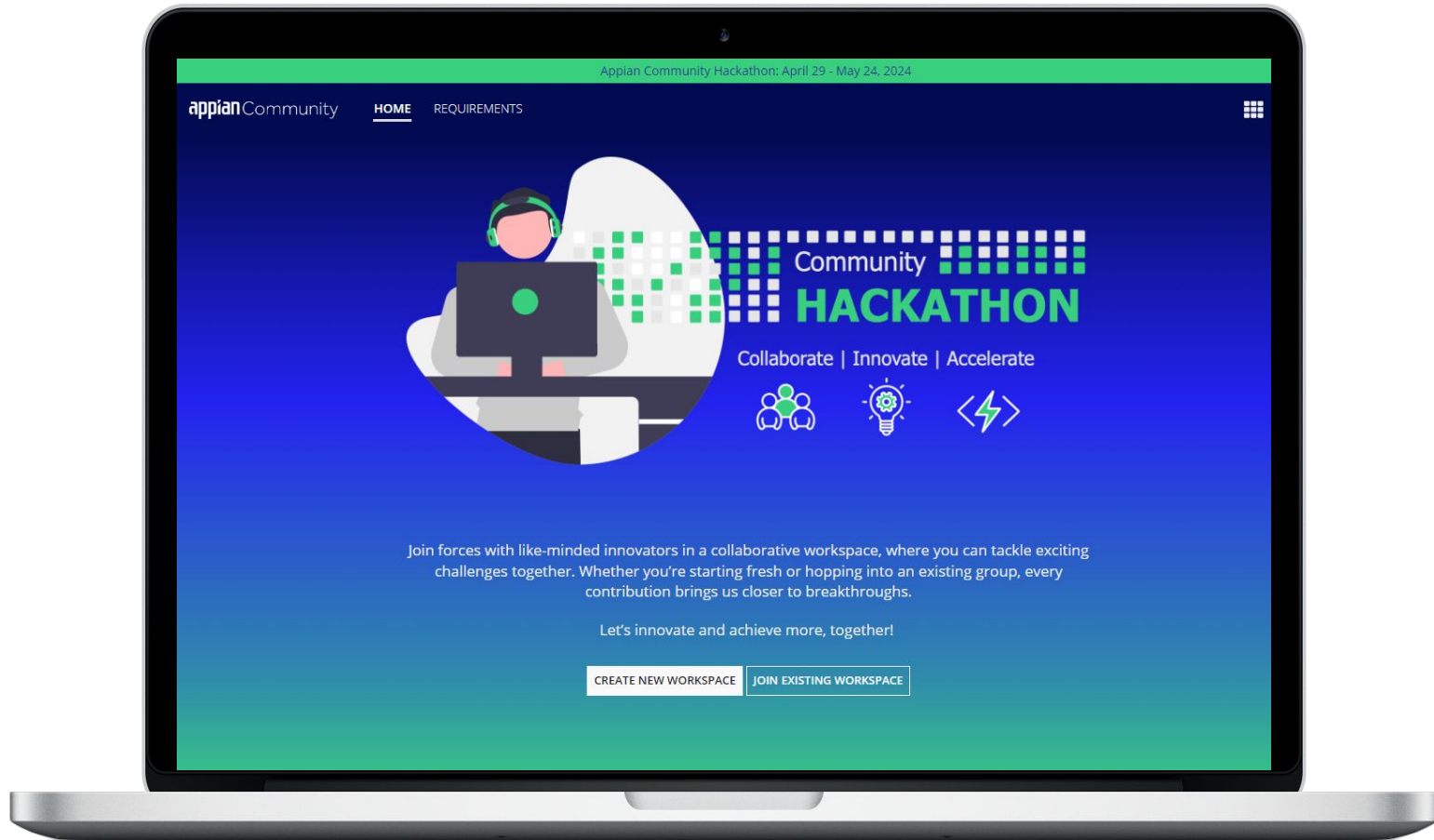


# Live Build



Congratulations to Team KPMG!

# Appian Community Hackathon



# Featured AppMarket Listings

## Gen AI Connectors



New connectors to popular 3rd Party  
**Generative AI services.**

## New and Updated Component Plug-Ins



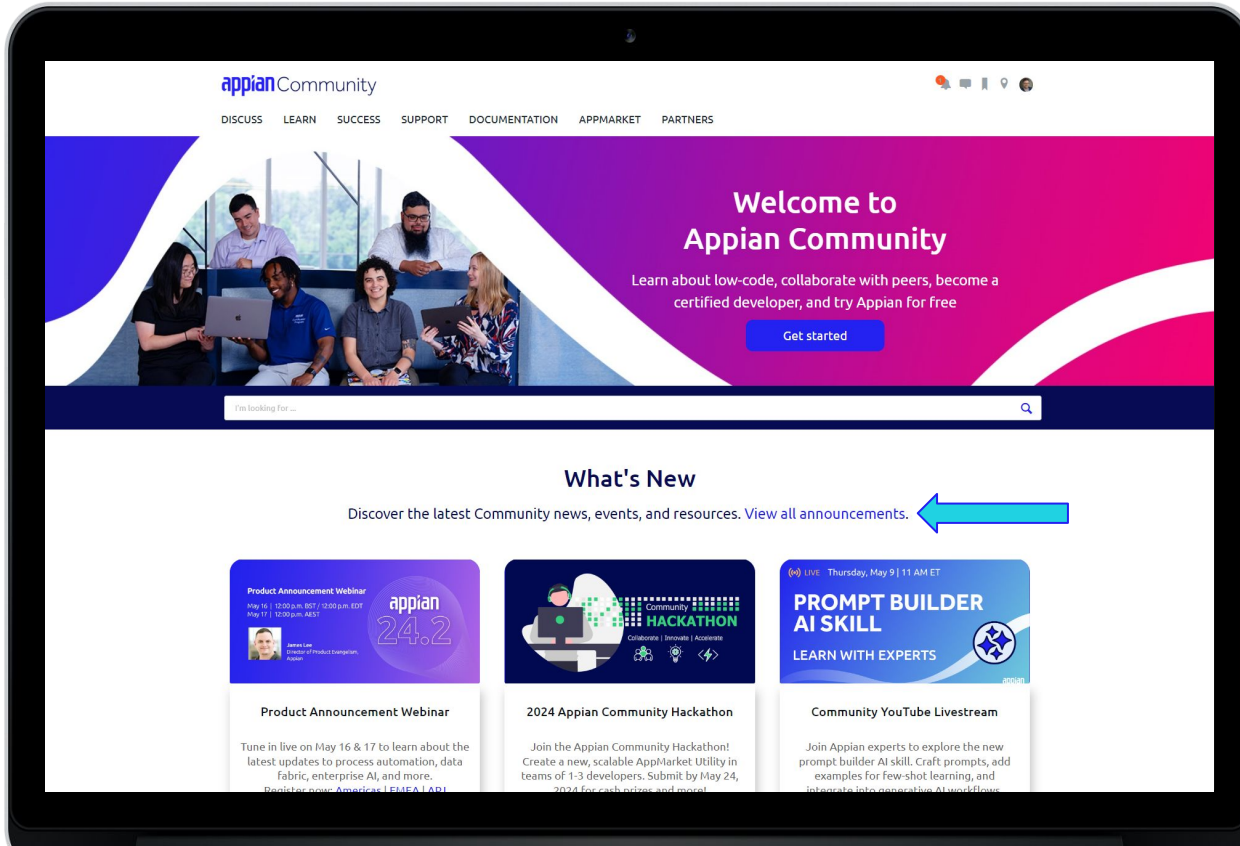
Updated PowerBI component supports  
interactive, **paginated** reports in Appian.



New component plug-in allowing for  
**template editing** and **document  
generation** with SmartCOMMS.

[community.appian.com/b/appmarket](https://community.appian.com/b/appmarket)

# New: Community brand & announcements forum



# New: ProcessHQ Learning Paths

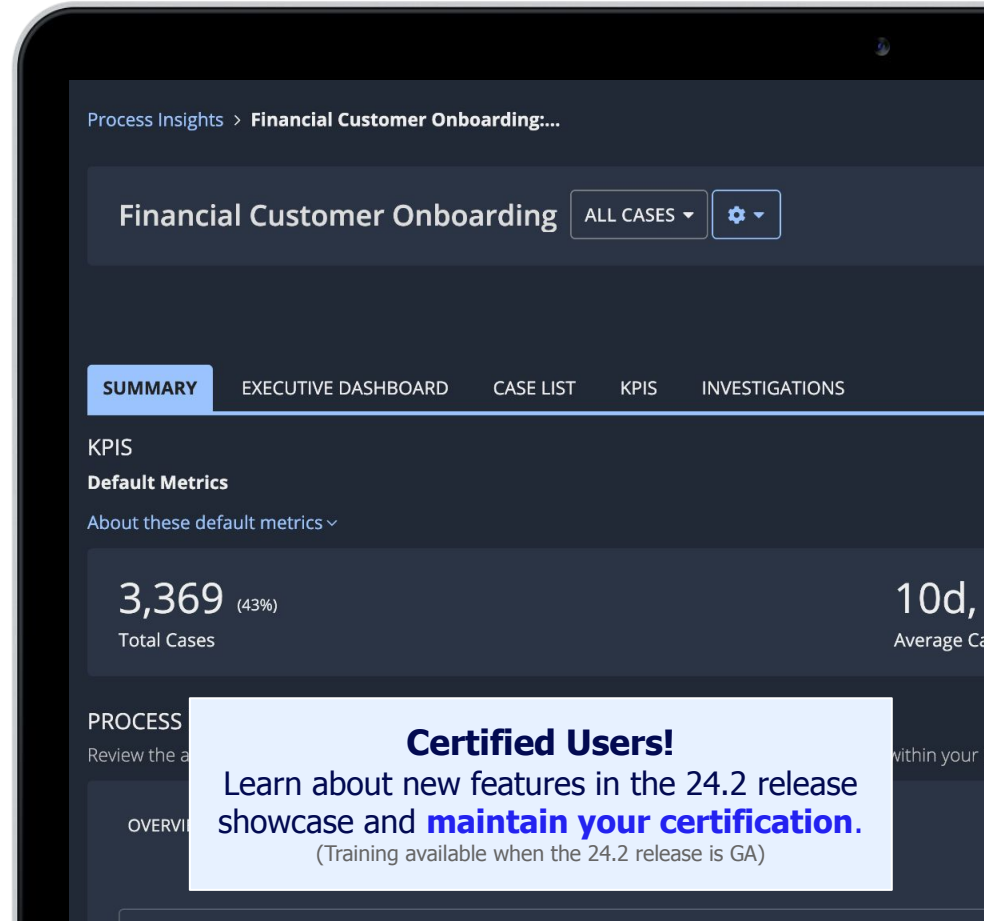
Coming soon! **2 new learning paths** designed to support developers and business users:

## Set Up Process HQ (for Developers)

- Learn how to prepare data and processes for use in Process HQ
- Learn how to configure access to Process HQ

## Analyze Processes and Data with Process HQ (Business Users and Analysts)

- Leverage the data catalog to discover insights from your data and design reports
- Analyze and investigate business processes for continuous optimization

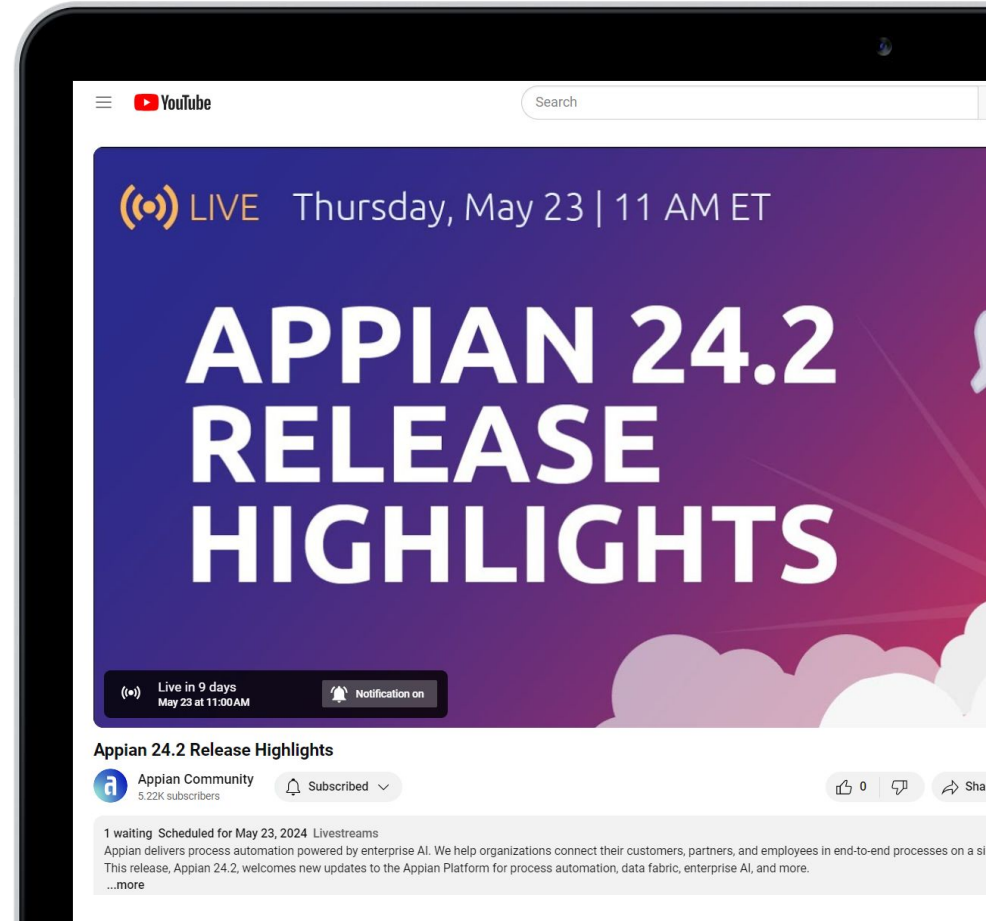


# Appian Community YouTube Channel

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

**188 videos & livestreams**, with new content every week.

**Next livestream** → **24.2 Release Highlights**





# New Appian Community Edition Experience

appian

DU

## Welcome to Appian Community Edition

Select a region for your experience! Choosing the environment closest to you will give you the best web performance, more convenient maintenance window times and the opportunity to collaborate with users in your region.

Choose your region



USA

[us.appian.community](https://us.appian.community)



India

[in.appian.community](https://in.appian.community)



Germany

[de.appian.community](https://de.appian.community)

Thank you.