

Technical Design Template

*<Application Name>*



*How To Use This Template*

#### The cover page is a google drawing that can be edited to change the text.

#### Orange text within brackets ( <example> ) should be customized to match your project/use case.

#### Not all sections may be applicable to your project and can be removed/edited.

#### Each section has release numbers so that the same architecture document can be used for multiple

#### releases.

#### Ensure table numbers are in sequence.

#### Update Table of Contents.

### Delete this page.



*Table of Contents*

[Overview 4](#_TOC_250015)

[Appian Platform 4](#_TOC_250014)

[Appian Application 4](#_TOC_250013)

[Volume 4](#_TOC_250012)

[Assumptions 4](#_TOC_250011)

[Business Roles 4](#_TOC_250010)

[User Experience 5](#_TOC_250009)

Business Workflow 5

[Data Model 5](#_TOC_250008)

[Record Types 6](#_TOC_250007)

[Business Reports 6](#_TOC_250006)

[Document Management 6](#_TOC_250005)

[Enterprise Landscape 6](#_TOC_250004)

[User and Role Management 7](#_TOC_250003)

[Provisioning 7](#_TOC_250002)

[Authentication 7](#_TOC_250001)

[Integrations 7](#_TOC_250000)

*This document is the blueprint for your Appian application:* <APPLICATION Name>.

# Overview

## Appian Platform

* Appian Cloud / On-premise
* Appian Version: 20.1

## Appian Application

* Application name:
* Naming prefix:

## Volume

* Capture high level data about the daily/monthly/annual volume
* Total number of users
* Number of concurrent users

## Assumptions

* <No data migration of x data>
* <No integration with y>
* <Read-only access to z>

# Business Roles

*The table below depicts the business roles for this application.*

|  |  |  |
| --- | --- | --- |
| **Business Role** | **Description** | **Access Overview** |
| <Business role> | <What does this role do?> | <What does this role need access to?  What are the access restrictions for this role?> |

# User Experience

*This section describes how users will interact with the Appian platform.*

##### < Questions to answer:

1. Is this a mobile first use case? Should mobile be considered?
2. Is this an embedded application?
3. The user experience should be based on an Appian Site. If this is not the case, why?
4. After logging in into Appian, where do the users land? How do they perform their business functions?

##### A wireframe is a good way to represent the user experience

>

*Business Workflows*

*This section contains the high level business workflows representing the main use cases of the application.*

< Copy paste workflow diagrams or Appian process models for each action that users can perform. Although it is early in the solutioning of the final design, think in terms of record centric design and short lived process models.

##### Questions to answer:

* Where are the external system integration points?
* Which business roles are assigned to the tasks?
* What are the critical business logic rules?

>

# Data Model

*The entity relationship diagram below identifies the main business entities and their relationships.*

##### < Questions to answer:

* Based on volume, is database data archival an immediate concern?
* Do we create a brand new database schema or integrate with an existing one?
* For reference data, do we need to migrate it from other systems? Reuse existing reference data tables? Create

our own from scratch?

* For data security, do we need row level security in the database?

>

##### <Copy and paste entity relationship diagram>

# Record Types

*This section outlines the business entities that will be represented by Appian record types in the application.*

##### <Questions to answer:

* Which business entities are Appian record types?
* What record actions are available to end users?
* How do ed users access specific records?

>

# Business Reports

*This section identifies the business reporting needs for this application.*

##### <Questions to answer:

* What are the business reports needed to support the business goals?
* What are the scopes of the reports? Daily operational reporting? Long term analytical reporting?
* Is the data to be reported on “owned” by Appian?
* Are there any additional data needed for the business reports that should be aggregated from external systems?
* Should the reports be generated in Appian?
* Should the reports be rendered in Appian?

>

# Document Management

*This section describes the document management strategy for this application.*

##### <Questions to answer:

* Where are the business documents ultimately stored?
  + Appian or external DMS?
* If external DMS
  + Are the documents staged in Appian and sent over in real time? Or at the end of the business process?
  + How are the documents stored in the DMS displayed to the users?
* What volume of documents are expected?
* Who can access the documents?

>

# Enterprise Landscape

*This section provides an overview of how the Appian platform fits into the enterprise existing infrastructure and systems.*

<Provide high-level diagram of Appian and the interaction with other systems that relates to this application>

# User and Role Management

## Provisioning

*This section describes how the users and their roles will be provisioned in the Appian platform.*

<Mostly relevant to applications built on a brand new Appian instance.

##### Questions to answer:

* Is the provisioning necessary?
* Will the provisioning be done using the existing LDAP sync solution?
* Will the provisioning be done using login with SAML?
* What other methods are being considered for creating users and groups into Appian?.

>

## Authentication

*This section outlines how the users log into Appian.*

##### <Questions to answer:

* Are you authenticating with LDAP, SAML or Appian only?
* If LDAP or SAML, is VPN needed to connect Appian to the IDP?

>

# Integrations

*This section provides a list of external systems that Appian will integrate with as well as the method of integration.*

##### <Questions to answer:

* What systems does Appian need to integrate with to satisfy the business requirements?
* What integration methods are supported by these systems and could be used by Appian?
  + Web services
  + Direct database JDBC connection
  + Robotic process automation
  + Others -> this may require a plugin

>