

Task Management System - Appian Project Overview

Project Overview: Task Management System

Objective:

To build a Task Management System on Appian using Record Types that allows users to:

- Create and assign tasks.
- Track task progress.
- Set due dates and priorities.
- Attach relevant documents.
- Generate reports on task status and productivity.

Data Models (Record Types):

1. User Record Type

- Purpose: Stores user information.
- Fields:
 - userId (UUID): Primary Key
 - username (Text): Unique Username
 - fullName (Text): Full Name of the User
 - email (Email Address): Contact Email
 - role (Text): User Role (Admin, Manager, Employee)
 - status (Boolean): Active/Inactive Status

2. Task Record Type

- Purpose: Stores task details.

- Fields:

- taskId (UUID): Primary Key
- taskTitle (Text): Title of the Task
- taskDescription (Rich Text): Detailed Description
- priority (Text): Priority Level (Low, Medium, High)
- status (Text): Status (New, In Progress, Completed, On Hold)
- createdBy (UUID): User who created the task (Relation with User Record)
- assignedTo (UUID): User assigned to the task (Relation with User Record)
- dueDate (DateTime): Due Date and Time
- createdAt (DateTime): Date when task was created
- lastUpdated (DateTime): Last Updated Date

3. Comment Record Type

- Purpose: Stores comments on tasks for collaboration.

- Fields:

- commentId (UUID): Primary Key
- taskId (UUID): Related Task (Relation with Task Record)
- commentText (Rich Text): Comment Content
- commentedBy (UUID): User who commented (Relation with User Record)
- commentedOn (DateTime): Timestamp of the comment

4. Attachment Record Type

- Purpose: Manages file attachments linked to tasks.

- Fields:

- attachmentId (UUID): Primary Key
- taskId (UUID): Related Task (Relation with Task Record)
- fileName (Text): Name of the File

- fileType (Text): Type of the File (PDF, DOCX, JPG, etc.)
- fileSize (Number): Size of the File
- uploadedBy (UUID): User who uploaded the file (Relation with User Record)
- uploadedOn (DateTime): Timestamp of Upload

Relationships Between Record Types:

- User to Task: One-to-Many (A user can create/assign multiple tasks)
- Task to Comment: One-to-Many (A task can have multiple comments)
- Task to Attachment: One-to-Many (A task can have multiple attachments)

Appian Features Utilized:

- Record Types, Interfaces, Process Models, Reports and Analytics

Security and Access Control:

- Admin: Can manage users, view all tasks, and modify any record.
- Manager: Can create tasks, assign tasks, and view reports.
- Employee: Can view and update assigned tasks, add comments, and upload attachments.

Deployment and Testing:

- Deployment Steps: Record Types, Interfaces, Process Models, Security
- Testing Scenarios: User creation, Task assignment, Commenting, Attachment functionality, Access control

This project covers all the fundamental aspects of using Record Types in Appian and showcases effective data modeling with a practical, real-world application.