**APPIAN DOCUMENTATION**

1. **Create a new ‘Application’**

Step 1: Visit [*https://disys.appiancloud.com/*](https://disys.appiancloud.com/)to sign-in to your Appian account.

Step 2: Choose the **Appian Designer** under the navigation.

Step 3: Now:

* Create a New Application and give a name to your application.
* Click on the **Create** button.
* On the next page, leave the security as such and hit **Save**.

Step 4: Now choose the ‘build’ icon from the left navigation bar.

**2. Create a Custom Data Type (CDT)**

Step 1: Select the **Data type** option in the Object type.

Step 2: Click on the **New** drop-down button and choose **Data Type**.

Step 3: Give a name to your data type under the ‘Name’ column and click **Create.**

Step 4: Click on **+New Field** and enter the fields as given in the image below.

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Step 5: Now using the same steps create another CDT with the following fields.

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Step 6: After creating another CDT, go to the first created CDT and add another field:

* Type – second created CDT
* Mark the ‘Array’ field.
* Click the ‘Foreign key’ to configure a relationship with the second created CDT.
* Under **Child Field Type**, select the following checkboxes:
  + Updates to a parent value should also update associated child value(s)
  + I know the name of the column(s) this field should use in the database.
* In the **Column Name** field, type “parentid” in all lowercase.
* Click **OK**.

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**3. Create a Data Store**

Step 1: Choose **Data Store** from the ‘OBJECT TYPE’.

Step 2: Click on the **NEW** drop-down button and choose **Data Store.**

Step 3: Give a name to your Data Store and click **Create.**

Step 4: Leave the security as such and hit **Save.**

Step 5: Now, click on **+Add Entity** and add the two CDT’s you created.

Step 6: Click on the **Verify** button and once the verification is complete, give **Save & Publish.**

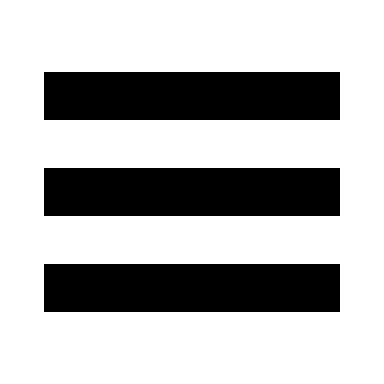
Step 7: Go back to your Appian Designer page.

**4. Creating a Constant**

Step 1: Go back to your Appian Designer page and create a folder by clicking the **New** drop down button.

Step 2: Copy and paste all your input documents in this folder.

Step 3: Now click on the **New** drop down button and create a constant:

* Give a name to your Constant.
* In the **Type** bar, select ‘Document’.
* In the **Value** bar, click on **** to browse your document and pick the folder you created with all the input files and click **OK.**

Click **Create** and go to your Process modeler to create an **Interface.**

**5. Building a Process Model**

Step 1: Choose **Process Model** from the ‘OBJECT TYPE’

Step 2: Click on the **NEW** drop-down button and choose **Process Model.**

Step 3: Give a name to your Process model and click **Create.**

Step 4: Leave the security as such and hit **Save.**

Step 5: Open the process model you created.

**5.1 Create an Interface for Start Node**

Step 1: Right click **Start Node Process Start Form**

* Click on **+Create Interface**, give a name to your interface and click **OK.**
* Click on **Edit Interface**.
* From the palette, drag in a **Form** and a **File upload.**
* Click on the **File upload** component and drag down through the ‘COMPONENT CONFIGURATION’
* In the **Target Folder** bar, select the ‘Constant’ you created.
* In the **Selected Files** bar, select **documentCDT.**
* In the **Save Files To** bar, select **documents.**
* Click **Save Changes.**

**5.2 Working on the Process Model**

Step 1: In the process model, click on **File Properties Variables.**

Step 2: Select **+Add Variable** and the fill the fields as in the image.

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Step 3: After you declare all the variables click **OK.**

Step 4: From the palette, drag in a **Start Doc Extraction** smart service.

**5.3 Configuring Smart Doc Extraction**

Step 1: Right click on the **Start Doc Extraction** and choose:

**Properties Data Input**

Step 2: Now:

* Runtime Document: Value- ‘=pv!document’.
* Preferred Vendor: Value- ‘=pv!vendor’.

Step 3: Now click on **Output:**

* Doc Extraction Id: Target- ‘docExtractionId’.

Step 4: Click **OK.**

Now from the palette, drag in the **Script Task** and rename it to ‘Check Doc Extraction Status.

**5.4 Configuring Check Doc Extraction Status**

Step 1: Right click **Check Doc Extraction Status:**

**Properties Data Input**

Step 2: Click on **+New Input:**

* Name- ‘docExtractionId’.
* Type- ‘Number (Integer)’.
* Value- ‘=pv!docExtractionId’.
* Save into- ‘docExtractionId’.
* Check the multiple and required field.

Step 3: Go to the **Output** bar and click on **+New Custom Output:**

* Expression- ‘a!docExtractionStatus(pv!docExtractionId)’.
* Target- ‘docExtractionStatus’.

Click **OK.**

Step 4: From the palette, drag in a **XOR** gateway and rename it to ‘Complete?’.

**5.5 XOR gateway and Timer**

Step 1: Create a connection between **Complete?** Gateway and **Check Doc Extraction Status.**

Step 2: Drag in a Timer in the connection between **Complete?** Gateway and **Check Doc Extraction Status** from the palette and rename it to ‘Sleep’.

Step 3: Right click **Sleep:**

**Timer Properties Setup Delay for 1 minute**

Step 4: From the palette, drag in a **Script Task** and place it after the **Complete?** Gateway.

Step 5: Rename the **Script Task** to ‘Get Doc Extraction Result’.

**5.6 Configure Get Doc Extraction Result**

Step 1: Right click **Get Doc Extraction Result :**

**Properties Data Output**

Step 2: Click on **+New Custom Output:**

* Expression- ‘a!docExtractionResult(pv!docExtractionId, typeof(pv!documentCDT))’
* Target- ‘documentCDT’
* Click **OK.**

**5.7 Configure Complete?**

Step 1: Right click **Complete?**:

**Properties Decision**

Step 2: In the Decisiontab, click on **New Condition** and fill the fields as in the image below.

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**5.8 Reconcile Doc Extraction**

Step 1: From the palette, drag in a **Reconcile Doc Extraction** and place it next to **Get Doc Extraction Result.**

Step 2: Right click **Reconcile Doc Extraction:**

**Properties Data Input**

Step 3: In the Input tab:

* Doc Extraction Id: Value- ‘=pv!docExtractionId’.
* Data Type Number: Value- ‘=typeof(pv!documentCDT)’.
* Is Structured Doc: Value- ‘True’.

Step 4: In the Output tab:

* Reconciled Data: Target- ‘documentCDT’.
* Is Submit: Target- ‘isSubmit’.
* Is Invalid: Target- ‘isInvalid’.

Step 5: In the Assignment tab:

* Assign to the following: give your username.

Step 6: Click **OK.**

Step 7: From the palette, drag in another **XOR** gateway and place it next to **Reconcile Doc Extraction,** rename it to ‘Reconcile Fail?’.

**5.9 Configure Reconcile Fail?**

Step 1: Before configuring **Reconcile Fail?** , from the palette drag in **MS Word 2007 Doc from Template** and place it next to **Reconcile Fail?** Gateway.

Step 2: Rename it to ‘Word Doc from Template’.

Step 3: Right click **Reconcile Fail?:**

**Properties Decision**

Step 4: In the Decisiontab, click on **New Condition** and fill the fields as in the image below.

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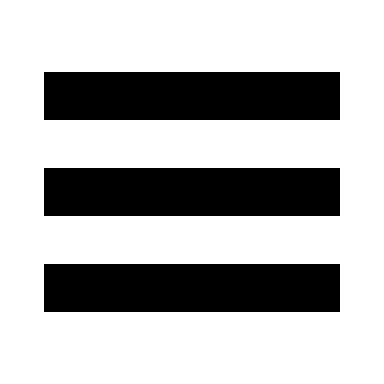
**6. Configure MS Word Template**

Step 1: Create a word document in the format of a Template with all the required fields.

**(Template Image)**

Step 2: Right click on **MS Word 2007 Doc from Template.**

**Properties Setup**

* In the template bar, click on the (**Directory )**
* Select the folder where you want to upload your template.
* Upload your word document here using the **+Upload document** option and click **OK.**

Step 3: Now you’ll find all the fields as per the Template document you created.

Step 4: Now replace those fields with the declared variables.

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Now create a connection between **Reconcile Fail?** Gateway and **End Node,**

Similarly create a connection between **Complete?** Gateway and **End Node.**

Go back to your Process modeler page, at this time your process modeler will look like this:

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Now, go to **File** and **Save & publish** your process modeler.

In the **File,** click on **Start process for debugging** or give ‘Ctrl+D’.

Upload the document you want to configure and click **Submit.**

Now, your process will start and work perfectly.