

Appian Tips & Tricks Webinar: ***Breaking Boundaries with Embedded SAIL***

Matt Hilliard, Principal Product Manager, Appian SAIL
November 13, 2014



Appian World – Mark Your Calendar!

Register Today! <http://appianworld.com>

- Date: April 27-29, 2015
- Location: Mandarin Oriental,
Washington, DC

Highlights

- 700+ customers from around the world
- Captivating agenda
- Guest keynotes
- Customer Appreciation Dinner



Upcoming Training Sessions

- Learn more:
www.appian.com/training
- Register at:
forum.appian.com

Academy

This course covers content from Process Design, Advanced Data, and Records and Reports in a fast-paced, extended-hour (including homework and weekends) environment geared for a technical designer. This course includes a written exam and final project and presentation and can end in Appian Certified Application Designer (ACAD) Level I certification.

[View Full Description](#)

DURATION 10 days

LOCATION Reston

COURSE DATES

December 1 - 12

Application Design Bootcamp

Design, implement and manage business processes following Appian Center of Excellence (CoE) best practices. Leverage out-of-the-box features to create process models, write process data to and retrieve process data from external data sources such as MySQL, and design records and reports.

[View Full Description](#)

DURATION 5 Days

LOCATION London, UK

COURSE DATES

December 8 - 12

Application Design Bootcamp

Design, implement and manage business processes following Appian Center of Excellence (CoE) best practices. Leverage out-of-the-box features to create process models, write process data to and retrieve process data from external data sources such as MySQL, and design records and reports.

[View Full Description](#)

DURATION 5 Days

LOCATION London, UK

COURSE DATES

December 15 - 19

High-Level Agenda

- SAIL Overview
- Embedded SAIL Tasks & Actions
 - Overview
 - Demo
 - Walkthrough
 - Troubleshooting
- Questions and Answers

Rich, Interactive Interfaces

News Tasks **Records** Reports Actions

Appian

Records / Commercial Banking Customers
Toyota Motor Company

Customer Details

Legal Name: Toyota Motor Sales, U.S.A., Inc. Global ID: GC54321
Customer Industry: Auto
Company Type: Public
Corporate Website: <http://www.toyota.com>
Contact Name: Michael Wheeler
0 Active Credit Requests
1 Active Complaints
Customer Since: 1/3/2011

Summary
News
Related Actions
Financials & News
CRM History

Total Relationship: \$650,000.00
Customer Satisfaction Score: 95%
Upsell Potential: 62%
ORR: 9

Reports

Customer Activity Timeline
Recent Credit and Customer Service Activity

Active Credit Products

Attachments and History

Document Attachments: Adverse Action Letter 22 APR 14, Sample Loan Info, Sample document, Sample document

Image Attachments:

Credit Request History

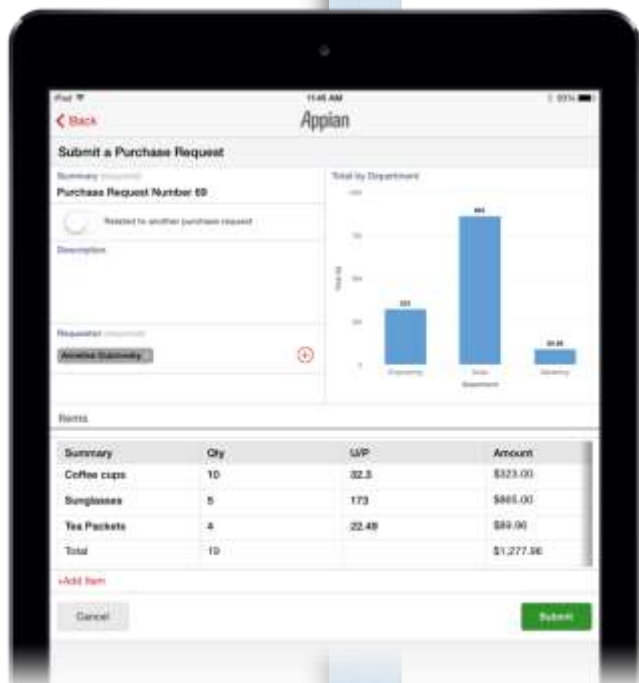
Date	Product Type	Request Amount	Sales Rep	Status
4/22/2014	Bridge Loan	\$105,000.00	Epstein	Declined
3/31/2014	Business Credit Card	\$49,000.00	Vaccarella	Request Submitted
3/27/2014	Certified Business Loan	\$50,991.00	Nazareth	Approved By Underwriter



Responsive Portable Interfaces

Appian

[Back to Actions](#)



Submit a Purchase Request

Summary *

Purchase Request Number 75

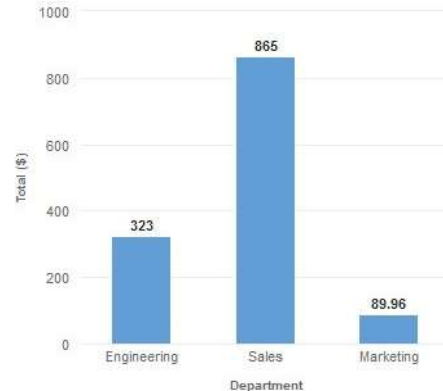
☐ Related to another purchase request

Description

Requestor *

Alison Cowley *

Total by Department



Items

Summary	Qty	U/P	Amount	Due	Dept	Proj	Other	
Coffee cups	10	32.3	\$323.00	6/1/2014	Engineerin	E: Proj B		×
Sunglasses	5	173	\$865.00	6/15/2014	Sales	S: Proj C		×
Tea Packets	4	22.49	\$89.96	6/30/2014	Marketing	M: Proj A		×
Total	19		\$1,277.96					

+Add Item

Cancel

Submit

Appian

Embedded SAIL Tasks and Related Actions

You have accepted this task. Return task to all assignees.

Review Incident

Identification Investigation and Diagnosis Resolution and Recovery Closure

Update Incident Status *

Identification

Select the appropriate status for this incident.

Subject *

Incorrect Product Stock

Enter a short title / summary of this incident for quick reference.

Description



There is an incorrect product stock in our inventory for HP laser printers.

Enter a long description of this incident.

Reviewer Comments

Enter your comments on this incident.

Incident Evaluation

Ratings	Images	Name	Urgency *
		High Impact	Low
		Low Urgency	

Select an urgency rating. Urgency is a measure for how quickly the incident needs to be addressed.

This is SAIL

End User
Web App

End User
iOS App

End User
Android App



Application
Designer

Interface
Designer

Process
Designer

Data
Designer

Introducing Our Speaker

Matt Hilliard

- Principal Product Manager
- Focus on SAIL
- 9 years experience in Appian PS
- Enjoys:
 - Reading
 - Reviewing Books
 - Soccer



Embedded SAIL Overview



- Traditionally, to access Appian content, your users go to your Appian site
- New in Appian 7.7: Display Appian SAIL forms on other web sites
- Done using HTML5 web components, not iframes or popups
- The web page surrounding our form can be whatever you want to define using HTML, Javascript, and CSS



Considerations



- Only SAIL task and related action forms
- Because the left pane is not shown, there is no way to save or reassign an embedded task form
- Internet Explorer 8 is not supported; all other Appian-supported browsers work fine

Embedding Tasks Walkthrough:

Authentication



- To retrieve information from the Appian server, the requests must come from an authenticated user
- Both your web site and the Appian server should share a common single sign-on system
- Single sign-on means that once authenticated to your web page, the user can seamlessly access the Appian system

Embedding Tasks Walkthrough:

Cross-Origin Resource Sharing



- To protect you from malicious pages, browsers do not allow one page to load script content from another
 - Exceptions can be made via cross-origin resource sharing (CORS)
- If the web page and the Appian system are served off different hosts (from the perspective of the browser) then you must add the embedded site's host to the allowed list in the administration console

Embedding Tasks Walkthrough:

Creating a Task List



- Use Appian's Java API to access a user's tasks
 - e.g., the method `getMyTasks` in [ProcessAnalyticsService](#)
- To make this data available to your web page, call the API from [a servlet plugin](#)
 - The documentation example implements this exact case
- To call the servlet plugin, use your AJAX framework of choice
 - Appian's embedded interfaces documentation provides [an example using jQuery](#)

Embedding Tasks Walkthrough:

Embedding the Task



- Once you have the id, embedding a task is straightforward

```
<appian-task taskId="22" />
```

- May be done dynamically with native Javascript or any Javascript framework
- The <appian-task> tag acts just like a normal HTML tag

Embedding Tasks Walkthrough:

Submission



- When the task is submitted, a “submit” Javascript event is raised
- By listening for this event, you can control what happens after submission
 - In this case, we probably want to show the task list again
- There are two other events, one for group assignment features and one for errors

- Related actions work similarly to tasks, but require three identifiers:
 - Record type URL stub
 - Record identifier
 - Process model UUID
- Usually the record type and the process model are always the same, but...
- You will have to supply the record identifiers yourself

Common problem areas:

- The HTML and Javascript of the surrounding page
- Request being blocked due to CORS restrictions
- Web server blocking an OPTIONS request
- SSO blocking a request to the Appian server
- Incorrect task or related action identifiers

Questions

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Additional Resources

- Appian 7.7 Resources
 - [Download](#)
 - [Documentation](#)
- SAIL Resources
 - [Interface Designer](#)
 - [SAIL Design](#)
 - [SAIL Components](#)
 - [SAIL Recipes](#)
 - [SAIL Tutorial](#)
- General Product Resources
 - Tips & Tricks webinars
 - Product webinars