**Correspondence Tracking System (CTS) Application - Cloud Deployment Guide**

**CTS 1.0.0**

**Minimum Appian Software Version: 16.2**

# Full Deployment (Clean Installation)

**Required Environment Configurations (maintenance window and downtime required)**

* None

**Required Plugins**

* Advanced Document Templating (v1.0.4)
* Appian Health Check Plugin (v.4.8.0)
* Appian Object Information Retriever (v.2.5.1)
* CSV Parser Plug-in (v1.6.2)
* Content Expressions (v1.0.7)
* Generate Gregorian Calendar (1.0.0)
* Group Functions (v3.1.0)
* People Functions (v1.1)
* Personalization Utilities (v3.3.2)
* Process Sizing Smart Services (v.1.2.0)
* User Profile Picture Utilities (1.0.0)
* Export SQL and Report Data to EXCEL – V2 (v3.2)
* Download DataSubset (Cloud) (v.1.2.1)

**Required Application Packages**

* Appian Common Objects 7.5 Release 2\_Artifacts.zip
* Appian Common Objects 7.5 Release 2\_Rules and Constants.zip
* AF Common Objects.zip
* Acceleration Framework Common Objects.zip
* CTS.zip
* Correspondence Tracking System.zip
* CTS Admin Console Settings.zip

**Required Database Scripts**

* MySQL
  + AF Release 1.0.0 Create DB.sql
  + CTS Release 1.0.0 Create DB.sql
  + CTS Release 1.0.0 Insert Reference Data.sql

**Required Users**

* Service account of Basic User user type that is not tied to a specific person
  + Example Username: CTS.System
  + Password: <<Password to be specified by deployment manager>>
    - User account will be prompted to change password upon initial login, so set the password to anything initially
  + First Name: CTS
  + Last Name: System
  + E-mail Address: <<Insert valid email address for user/group maintaining service account>>

**Required Images**

* None

**Configuration Steps**

1. Create an Appian Technical Support case on Appian Forum to request the following: (this step should be accomplished ahead of time, prior to the deployment window)
   1. Deploy the required plugins listed above
2. Import **Appian Common Objects 7.5 Release 2\_Artifacts.zip**
3. Import **Appian Common Objects 7.5 Release 2\_Rules and Constants.zip**
4. Create Table structure utilizing the database appropriate scripts (in the following order):
   1. MySQL
      1. **AF Release 1.0.0 Create DB.sql**
      2. **CTS Release 1.0.0 Create DB.sql**
      3. **CTS Release 1.0.0 Insert Reference Data.sql**
5. Import **AF Common Objects.zip**
6. Import **Acceleration Framework Common Objects.zip**
7. Import **CTS.zip**
8. Import **Correspondence Tracking System.zip**
9. Manually set the appropriate values for the environment specific values:
   1. Navigate to Rules > CTS > Constants > Users and Groups
      1. Set **CTS\_USR\_SYSTEM\_ADMIN** = CTS.System (Required User referenced above)
   2. Navigate to Rules > CTS > Utility
      1. Set **CTS\_RULE\_Utility\_setDocCheckInExpiration** = <<Expiration time to be specified by deployment manager>>
         1. By default, set to 72 hours
      2. Set **CTS\_RULE\_Utility\_setRelatedActionExpiration** = <<Expiration time to be specified by deployment manager>>
         1. By default, set to 10 minutes
      3. Set **CTS\_RULE\_Utility\_setTempoActionExpiration** = <<Expiration time to be specified by deployment manager>>
         1. By default, set to 4 hours
10. Navigate to the People tab
    1. Search for the **CTS Appian Administrators** group
       1. Add the following service account(s) to the group:
          1. CTS.System (Required User referenced above)
11. Navigate to the System tab
    1. Under Administration Pages on the left hand pane, navigate to the Internationalization directory > Internationalization Settings
       1. Set the **Primary Time Zone** to (UTC-05:00) Eastern Time (America/New\_York)
    2. Under Administration Pages on the left hand pane, navigate to the Process Calendar directory > Set Working Time
       1. Set the **Time Zone** to (UTC-05:00) Eastern Time (America/New\_York)
12. Navigate to the Appian Administration Console
    1. Import **CTS Admin Console Settings.zip**

# Revert Changes (Back Out Plan)

The following steps will be taken if the deployment into the target environment needs to be reverted.  If the target environment is in Appian Cloud, snapshots will be taken on a daily basis.  The deployment team will need to coordinate with Appian Support to revert to the last snapshot.

* Notify stakeholders of the deployment rollback
* Create an Appian Support case with instructions to revert back to a prior snapshot.  Include the following information:
  + Target Environment to revert
  + Snapshot Date to revert to