**Help Application - Deployment Guide**

**HELP 1.0.0**

**For Appian Software Version: 16.2+ and MySQL Database**

# Full Deployment (Clean Installation)

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

* None

**Required Plugins**

* AdvancedDocumentTemplating (v1.0.4)
* Content Expressions (v1.0.7)
* CSV Parser Plugin (v1.6.2)
* GenerateGregorianCalendar (v1.0.0)
* GroupFunctions (v3.1.0)
* People Functions (v1.1)
* PersonalizationUtilities (v3.3.2)
* User Profile Picture Utilities (v1.0.0)
* com.appiancorp.analytics.excel\_export (v3.2)
* getDataSubsetDownloadLinkFromProcess (v1.2.1)

**Required Application Packages**

* AF Common Objects - Unpublished.zip
* AF Common Objects.zip
* Help – Data Stores and CDTs.zip
* Help – All Objects.zip
* Help.zip

**Required Database Scripts**

* MySQL
  + AF Release 1.0.0 Create DB.sql
  + Help Release 1.0.0 Create DB.sql
  + Help Release 1.0.0 Insert Reference Data.sql
* Oracle
  + AF Release 1.0.0 Create DB.sql
  + Help Release 1.0.0 Create DB.sql
  + Help 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: Help.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: Help
  + Last Name: System
  + E-mail Address: <<Insert valid email address for user/group maintaining service account>>

**Required Images**

* None

**Configuration Steps**

1. Login as a system administrator.
2. Create table structure utilizing the database appropriate scripts (in the following order):
   1. **AF Release 1.0.0 Create DB.sql**
   2. **Help Release 1.0.0 Create DB.sql**
   3. **Help Release 1.0.0 Insert Reference Data.sql**
3. Import **AF Common Objects - Unpublished.zip**
4. Import **AF Common Objects.zip**
5. Import **Help – Data Stores and CDTs.zip**
6. Import **Help – All Objects.zip**
7. Import **Help.zip**
8. Manually set the appropriate values for the environment specific values:
   1. Navigate to Rules > HELP > Constants > Users and Groups
      1. Set **HELP\_USR\_SYSTEM\_ADMIN** = Help.System (Required User referenced above)
9. Navigate to the People tab
   1. Search for the **Help Appian Administrators** group
      1. Add the following service account(s) to the group:
         1. Help.System (Required User referenced above)

# Revert Changes (Back Out Plan)

The following steps will be taken if the deployment into the target environment needs to be reverted:

* Notify stakeholders of the deployment rollback
* For Cloud environments: Snapshots will be taken on a daily basis.  The deployment team will need to coordinate with Appian Support to revert to the last snapshot.
  + 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
* For On-Premise environments: Immediately prior to beginning deployment, backup the existing Appian installation:
  + Properly shutdown Appian and ensure the engines are checkpointed upon shutdown and any scheduled processes are disabled during the deployment window
  + Backup the Appian installation on all web servers, app servers, and engine servers
    - Create a copy of the entire <<APPIAN\_INSTALL>> directory of your Appian instance and rename it to clearly denote it as a backup copy (e.g. “<<APPIAN\_INSTALL>>\_<<CURRENT\_DATETIME>>\_bkup”)
    - Backup the Apache directory on the web server(s)
    - Backup any fileshare documents (for multiple JBoss instances sharing a fileshare). If not using fileshare, backup the \_admin and other data directories
    - Backup the primary and business databases
  + Properly start Appian and begin full deployment procedure outlined above
  + Revert to this backup copy by:
    - Properly shutdown Appian
    - Rename the entire <<APPIAN\_INSTALL>> directory of your Appian instance on all web servers, app servers, and engine servers to clearly denote it as a failed attempted deployment copy (e.g. “<<APPIAN\_INSTALL>>\_<<CURRENT\_DATETIME>>\_failed”
    - Rename the backup copy to the original <<APPIAN\_INSTALL>> directory name on all web servers, app servers, and engine servers
    - If using a fileshare for multiple JBoss servers, replace the contents with the backup taken in the previous step
    - Restore the Appian Primary database with the backup taken
    - Restore the Appian Business database with the backup taken