Case Management Application Deployment
Installation Instructions

Introduction

The Case Management Application is divided into a Core package and a Core Data Loader package. This document will help you successfully deploy the application into your Appian instance.

The Core package contains the main components of the Case Management Application, which include:
- Customers
- Products
- Orders
- Service Requests

Please review the [Case Management User Guide](#) for details on the scope of the application, what it is, what it does, and why it matters, as well as how to use and interact with the application.

The Core Data Loader package is an optional deployment. It doesn't alter the behavior or logic of the core application in any way. Instead, it is a tool that automatically generates data for the application. This is useful when you need to simulate cases to fully experience the record dashboards, reports, tasks, and news feed events. You may also wish to use the Data Loader to quickly set up a demonstration of Appian as a case management solution. The Data Loader creates:
1. 50 fictitious users in the system with full profile details and images, distributed into the several groups created by the application.
2. 50 fictitious customers with full record details.
3. 163 sample products with full record details.
4. A configurable amount of orders placed within a configurable amount days from today. Orders will be for a randomly selected customer, with a random number of randomly selected products.
5. A configurable amount of service requests placed within a configurable amount days from today. Service requests will be for a randomly selected customer, and may be related to a specific order or not.

If you decide to take advantage of the Data Loader feature, you first must make sure the core application package has been successfully deployed.

System Requirements

Appian 7.8 or later installed.
There are no other dependencies on other applications nor plugins.

Installing the Case Management Core Application

1. Login to the Appian Designer interface as a user with Admin privileges.
2. Import Case Management Core, the application zip package
   a. In Appian 7.8
      i. Go to the Designer interface at
         ● `https://{YOUR SERVER ADDRESS}/suite/designer`
      ii. Go to the Applications tab and click on "Import"
      iii. Select the "Case Management Core" zip package and import
   b. In Appian 7.9
      i. Go to the new Designer interface at
         ● `https://{YOUR SERVER ADDRESS}/suite/design`
      ii. Select "Import Application"
   c. Select the "Case Management Core" zip package and import
3. If you select "Inspection" on the Core application package before you import, you may receive an error concerning missing dependencies. This can be ignored; the error refers to CDT artifacts that are part of the package. The import will succeed.
4. Once import is complete, you will see the application imported with two problems related to data stores not publishing. Example of the errors is below:

```
dataStore _a-0000da5f-b0b8-8000-9ba2-011c48011c48_12642 1236 "CASE_APP_Core_DS": The
import of dataStore [id=1236 uuid=_a-0000da5f-b0b8-8000-9ba2-011c48011c48_12642] could
not be finalized: The data store "CASE_APP_Core_DS" [id=1236] was saved but cannot be
published: The data source [java:/jdbc/Appian] cannot be reached or its configuration
is invalid. Details: Could not find datasource    (APNX-1-4178-000) (APNX-1-4071-009)

dataStore _a-0000da89-b5e9-8000-9ba2-011c48011c48_3206 1237 "CASE_APP_CoreViews": The
import of dataStore [id=1237 uuid=_a-0000da89-b5e9-8000-9ba2-011c48011c48_3206] could
not be finalized: The data store "CASE_APP_CoreViews" [id=1237] was saved but cannot be
published: The data source [java:/jdbc/Appian] cannot be reached or its configuration
is invalid. Details: Could not find datasource    (APNX-1-4178-000) (APNX-1-4071-009)
```

5. Publish the CASE_APP_CORE_DS data store
   a. In Appian 7.8
      i. Go to the Designer interface at `https://{YOUR SERVER ADDRESS}/suite/designer`
      ii. Go to the System tab and navigate to the System Administration Home >Data Management > Data Management page on the left navigation, select the Data Stores tab

       iii.   Select the "CASE_APP_Core_DS" data store

       iv.   Select the proper Data Source to save all data into

       v.   Select "Verify" and then "Save and Publish" to create the Case Management Core tables in the RDBMS

  b. In Appian 7.9

       i.   Go to the new Designer interface at `https://{YOUR SERVER ADDRESS}/suite/design`

       ii.   Select the "Case Management Core" application

       iii.   Filter by object type "Data Store"

       iv.   Select the "CASE_APP_Core_DS" data store

       v.   Select the proper Data Source into which all data should be saved

       vi.   Select "Verify" and then "Save and Publish" to create the Case Management Core tables in the RDBMS

  c. Go to the System tab and navigate to the System Administration Home >Data Management > Data Management page on the left navigation, select the Data Stores tab

  d. Click on the `CASE_APP_CORE_DS` data store and select the proper Data Source, then click on "Verify," then "Save and Publish." This will create the core tables in the RDBMS.

6. Creating the database view

  a. **Appian Cloud instances:** Go to Home and click on the "Access MySQL Database" link on the left navigation

  b. **On-premise instances:** Open the database management tool for the database to which you saved your CASE_APP tables

7. Create a database view using the following SQL

  a. **NOTE:** You will need to adjust the SQL depending on the type of database you have. The following example has only been tested on MySQL:

```
CREATE VIEW caseapp_orderdetailsByCustomer
AS
SELECT
  concat(o.caseappcustomer_customer_id,'-',o.id,'-',oi.id,'-',p.id)
as id,
  o.caseappcustomer_customer_id customerId,
  c.name customerName,
  o.id orderId,
  o.taxrate orderTaxRate,
  o.shippingcost orderShippingCost,
  truncate(o.total,2) as orderTotal,
  oi.id orderItemid,
  oi.quantity orderItemQty,
  oi.orderitemunitprice orderItemUnitPrice,
  truncate(oi.quantity * oi.orderitemunitprice,2) prodTotal,
  p.id productId,
  p.name productName,
  p.manufacturer productManufacturer,
  p.quantity as productStock,
  p.productcategory productCategory
FROM
  caseapporder o
  INNER JOIN caseappcustomer c ON
o.caseappcustomer_customer_id=c.id
  INNER JOIN caseapporderitem oi ON
o.id=oi.caseapporder_orderitems_id
  INNER JOIN caseappproduct p ON oi.caseappproduct_product_id=p.id
ORDER BY
  o.caseappcustomer_customer_id,o.id,oi.id,p.id
```

8. Publish "CASE_APP_CoreViews" data store
   a. Appian 7.8
      i. Go to the Designer interface at `https://{YOUR SERVER ADDRESS}/suite/designer`
      ii. Go to the System tab and navigate to the System Administration Home >Data Management > Data Management page on the left navigation, select the Data Stores tab
      iii. Select the **CASE_APP_CoreViews** data store
      iv. Select the appropriate data source
      v. Select "Verify" and then "Save and Publish"
   b. Appian 7.9

      i.   Go to the new Designer interface at `https://{YOUR SERVER ADDRESS}/suite/design`

      ii.   Select the "Case Management Core" application

      iii.   Filter by object type "Data Store"

      iv.   Select the **CASE_APP_CoreViews** data store

      v.   Select the appropriate data source

9. Select "Verify" and then "Save and Publish"

Installing the Case Management Core Data Loader Application

1. Login to the `https://{YOUR SERVER ADDRESS}/suite/designer` as a user with Admin privileges
2. Go to the People Tab and search for the CASE_APP SR Case Workers group. Add at least one user to the group to which you have access.
3. Import the Case Management Core Data Loader application package
   a. Appian 7.8
      i. Go to the Applications tab
         1. `https://{YOUR SERVER ADDRESS}/suite/designer`
      ii. Click "Import"
   b. Appian 7.9
      i. Go to the new Designer interface at
         1. `https://{YOUR SERVER ADDRESS}/suite/design`
      ii. Select "Import Application"
4. Select the Case Management Core Data Loader application zip package and click "Import"
5. After successful import of the app wait a few minutes. You will receive an email welcome notification. Also, on the Tempo Interface you will see a new event, as well as a task
6. Follow the instructions on the task if you would like to load the system with sample data:

Would you like to generate Sample Data?

If you proceed with sample data generation, the system will generate 50 sample users, as well as sample Customers, Products, Orders and Service Requests. Please complete the form below to define the generation parameters.

Please be advised:

Submitting this task will result in the generation of 50 sample users and sample content. Users cannot be deleted after being generated, they can only be deactivated. If you don't want to generate data, simply cancel this task.

Data Generation Parameters

Default Email for All Sample Users *

[   ]

Enter a real email address that you can access. All demo users' emails will be set to this email address. You can use the reset password feature to access each users account.

Order data generation details:

How many orders would you like to generate?

[   ]

This value toggles the total number of orders to generate in the system. For example, if set to 300, a total number of 300 orders will be generated.

Generate orders within how many days?

[   ]

This values toggles the number of past days to generate orders. For example, if set to 100, all orders dates will be generated with a date posted within the last 100 days

Service Request data generation details:

How many service requests would you like to generate?

[   ]

This value toggles the total number of service requests to generate in the system. For example, if set to 100, a total number of 100 service requests will be generated.

Generate service requests within how many days?

[   ]

This values toggles the number of past days to generate service requests. For example, if set to 100, all service requests dates will be generated with a date posted within the last 100 days

[Cancel]   [Submit]