appian | Around the World

La verdadera revolución de la IA está en tus procesos empresariales.







Israel Martignon
Senior Solutions Consultant
Appian

Daniel Gómez
Senior Solutions Consultant
Appian

DEL POTENCIAL DE LA IA A RESULTADOS MEDIBLES

Spec-Driven Development

Agentic Automation

Document Automation

appian

DEL POTENCIAL DE LA IA A RESULTADOS MEDIBLES

Spec-Driven Development

Desarrollo asistido por IA que acelera la modernización de sistemas heredados y permite **mejoras operativas continuas**.

Agentic Automation

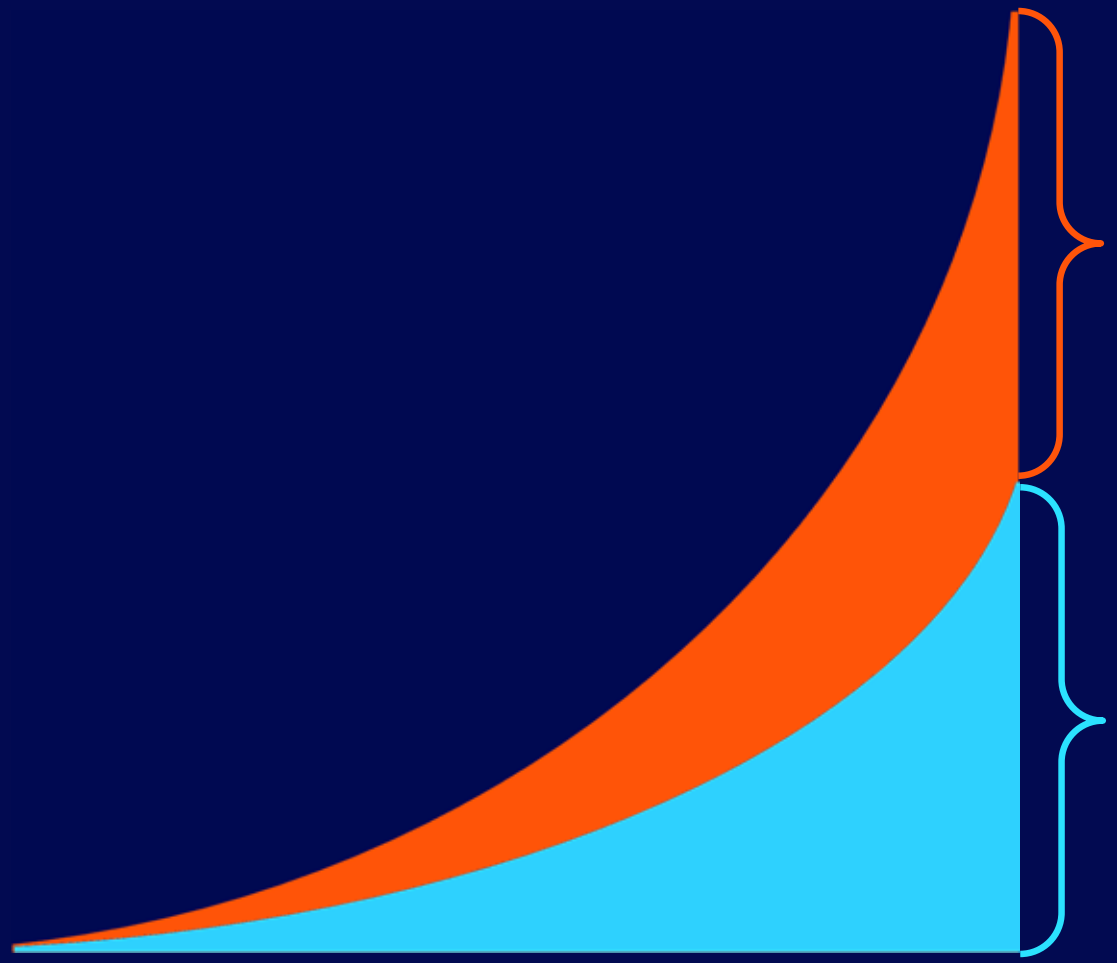
Appian amplía la **potencia** y el alcance de sus agentes de IA con contexto e **interoperabilidad** para gestionar tareas complejas de forma segura.

Document Automation

DocCenter, con más de 115 clientes, suma modelos **autoevolutivos**, **formatos complejos** y mayor procesamiento directo.

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SOLO VIBE-CODING ACELERA EL RIESGO



MAYOR RIESGO

DESARROLLO MÁS RÁPIDO

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5 - Loan Servicing System — Requirements Document.docx

Appian platform. The system replaces legacy servicing infrastructure — characterized by batch processing, manual data entry, spreadsheet-based workarounds, and siloed mainframe systems — with an integrated, AI-augmented platform that reduces cost per loan serviced, accelerates borrower outcomes, and maintains continuous regulatory compliance.

1.2 Scope

The system covers the full post-origination loan lifecycle: payment processing, escrow management, borrower communications, loss mitigation and default management, and regulatory compliance and reporting.

Loan boarding and document digitization are handled upstream by the originations system and are out of scope. This system receives structured loan data and digitized documents from originations at the point of servicing transfer.

1.3 Current State: Legacy Loss Mitigation Tracking

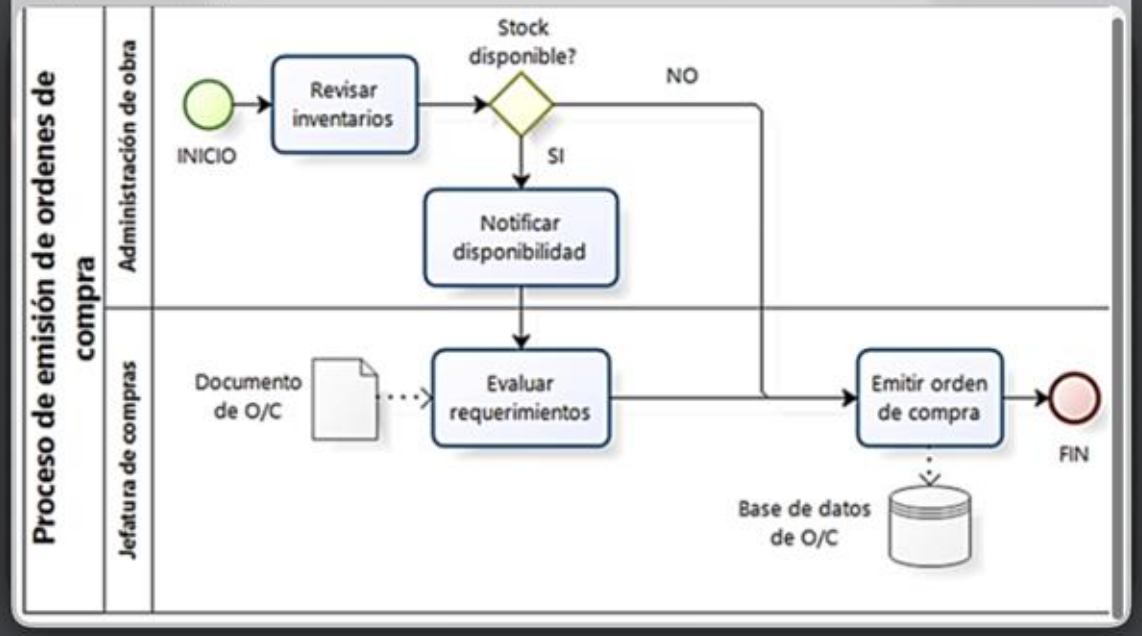
The loss mitigation pipeline is currently managed via a shared Excel spreadsheet (LossMit_Tracker.xlsx, provided separately as a CSV). This spreadsheet is the primary system of record for case status, document tracking, workout evaluation, and deadline management. It is maintained manually by the loss mitigation team and suffers from:

- No audit trail or access control
- Frequent sync conflicts when multiple specialists edit simultaneously
- Document status tracking limited to free-text columns (no integration with actual document

Upload Files

Upload up to 5 files. Maximum 4.5MB per file.

Flujo BPMN emision compra.pdf



Loan Servicing

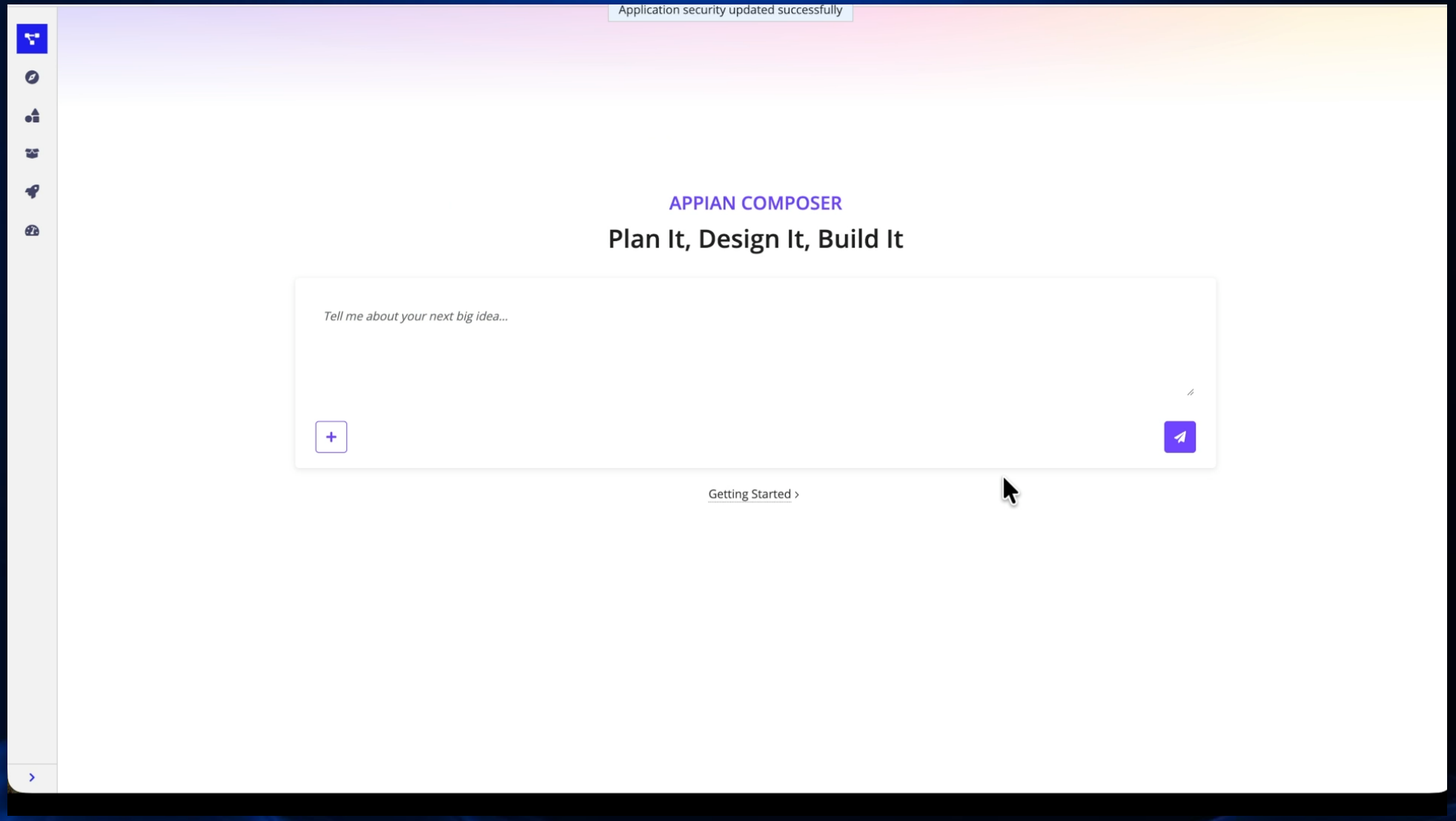
4 - LossMit_Tracker_v14_FINAL_FINAL2.xlsx

Loan Number	Borrower Name	Specialist	Hardship Type	Date Received	30-Day Ack Sent	Status	Workout Plan	Documents Received	Last Contact	Next Action Due
1042817	Maria Santos	JKeller	Job Loss	2026-02-10	Yes	Under Review		Hardship letter, Pay stubs (2), Bank stmts (3)	2026-03-14	2026-04-10
1042823	Robert and Linda Chen	AMarquez	Medical	2026-02-14	Yes	Docs Incomplete		Hardship letter	2026-03-01	2026-03-28
1042831	James Whitfield	JKeller	Divorce	2026-01-22	Yes	Approved — Pending Acceptance	Repayment Plan	Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return, Divorce decree	2026-03-20	2026-04-05
1042839	Priya Patel	DMorris	Income Reduction	2026-03-05	Yes	Under Review		Hardship letter, Pay stubs (2)	2026-03-18	2026-04-15
1042844	Thomas Jackson	AMarquez	Job Loss	2026-03-12	Yes	Under Review		Hardship letter, Pay stubs (2), Bank stmts (3)	2026-03-19	2026-04-12
1042856	Angela Rivera	DMorris	Death of Cobuttower	2026-01-08	Yes	Escalated to Manager		Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return, Death certificate	2026-03-10	2026-03-25
1042861	David and Karen Mitchell	JKeller	Disaster (Hurricane)	2026-03-20	Yes	Docs Incomplete		Hardship letter	2026-03-20	2026-04-20
1042875	Michael Okonkwo	AMarquez	Income Reduction	2026-02-25	Yes	Under Review		Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return	2026-03-17	2026-04-14
1042882	Sandra Williams	DMorris	Medical	2026-04-01	No — DUE 5/1	New — Initial Review			2026-04-01	2026-04-15
1042890	Frank and Deborah Russo	JKeller	Job Loss	2025-11-15	Yes	Denied — Appeal Pending		Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return	2026-01-30	2026-02-28
1042897	Yolanda Brooks	AMarquez	Income Reduction	2026-03-28	No — DUE 4/27	New — Initial Review	TBD	Hardship letter only	Pay stubs (2 months); Bank stmts (3 months); 2024 Tax return; 2025 Tax return	N/A	TBD
1042903	Christopher Nguyen	DMorris	Divorce	2026-02-02	Yes	Under Review	Short Sale	Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return, Divorce decree, Listing agreement, BPO	None	2026-05-03	2026-04-03
1042910	Patricia Hawkins	JKeller	Medical	2026-01-30	Yes	Under Review	Forbearance	Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return, Medical bills	2025 Tax return	2026-04-30	2026-04-01
1042918	George and Martha Coleman	DMorris	Income Reduction	2026-03-15	Yes	Docs Incomplete	TBD	Hardship letter, Pay stubs (1)	Pay stubs (1 more month); Bank stmts (3 months); 2024 Tax return; 2025 Tax return	N/A	On hold — waiting for
1042925	Raymond Foster	AMarquez	Job Loss	2026-02-20	Yes	Approved — Pending Acceptance	Repayment Plan	Hardship letter, Pay stubs (2), Bank stmts (3), 2024 Tax return, 2025 Tax return, New employment offer letter	None	2026-05-21	Complete
1042933	Lisa Tran	JKeller	Disaster (Flood)	2026-03-25	No — DUE 6/24	New — Initial Review	TBD	Hardship letter, FEMA declaration, Photos of damage	Pay stubs (2 months); Bank stmts (3 months); 2024 Tax return; Insurance	N/A	TBD

Loss Mit Pipeline | Pipeline Summary

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SPEC-DRIVEN DEVELOPMENT EN APPIAN



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Compose your application plan

Outline requirements, organize your ideas, and lay out the plan for your application

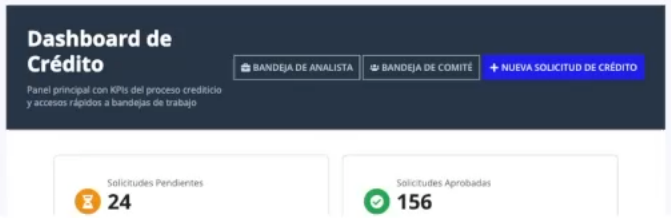
START BUILDING

UX Preview | Stories | Personas | Process | Business Rules | Data Model

UX Preview 7 screens

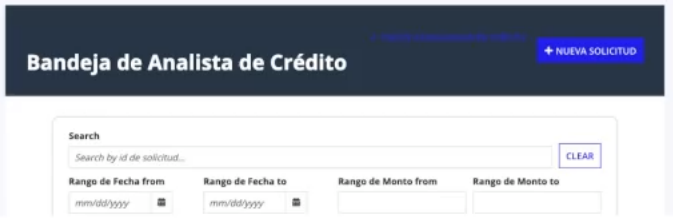
Customize your application's key user experiences

+ ADD SCREEN



Dashboard de Crédito

Panel principal con KPIs del proceso crediticio: total de solicitudes por esta...



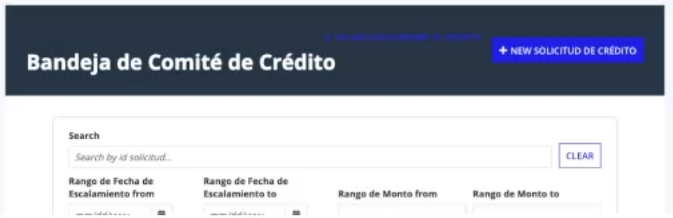
Bandeja de Analista de Crédito

Lista de trabajo que muestra todas las solicitudes de crédito de riesgo alto ...



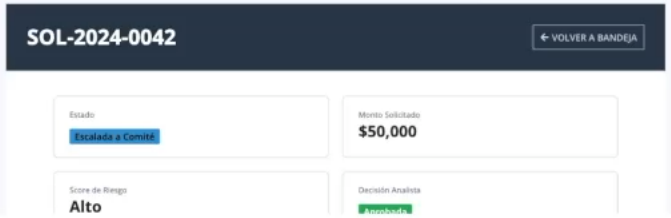
Expediente de Solicitud - Analista

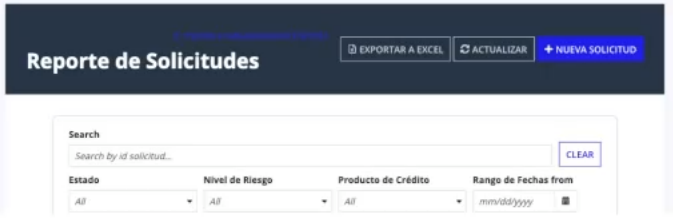
Vista de detalle del expediente completo de una solicitud de riesgo alto pa...



Bandeja de Comité de Crédito

Lista de trabajo que muestra todas las solicitudes escaladas al comité de c...





Composer

successfully created! 🎉 Here's a full summary of what was built:

✅ Screen Created: Ajustes de Parámetros

Screen ID: `54b09fce-ea7c-4a4a-a855-d10cf57b0b82`
Archetype: Form (Configuration/Settings) **Status:** Completed

📐 Screen Structure

The screen is organized into **5 clearly separated card sections**:

1. 🔴 Risk Thresholds

- **Minimum Credit Score** — Integer field (validated: 1–899)
- **Maximum Debt-to-Income Ratio (%)** — Decimal field (validated: 0–100%)
- **Minimum Monthly Income ($)** — Decimal field (must be > 0)

2. 💹 Interest Rates

- **Base Interest Rate (%)** — Decimal field (validated: 0–50%)
- **Penalty Rate (%)** — Decimal field (validated: 0–50%)
- **Promotional Rate (%)** — Optional decimal field
- **Live validation tag** — ↓ firms penalty rate is greater than base rate

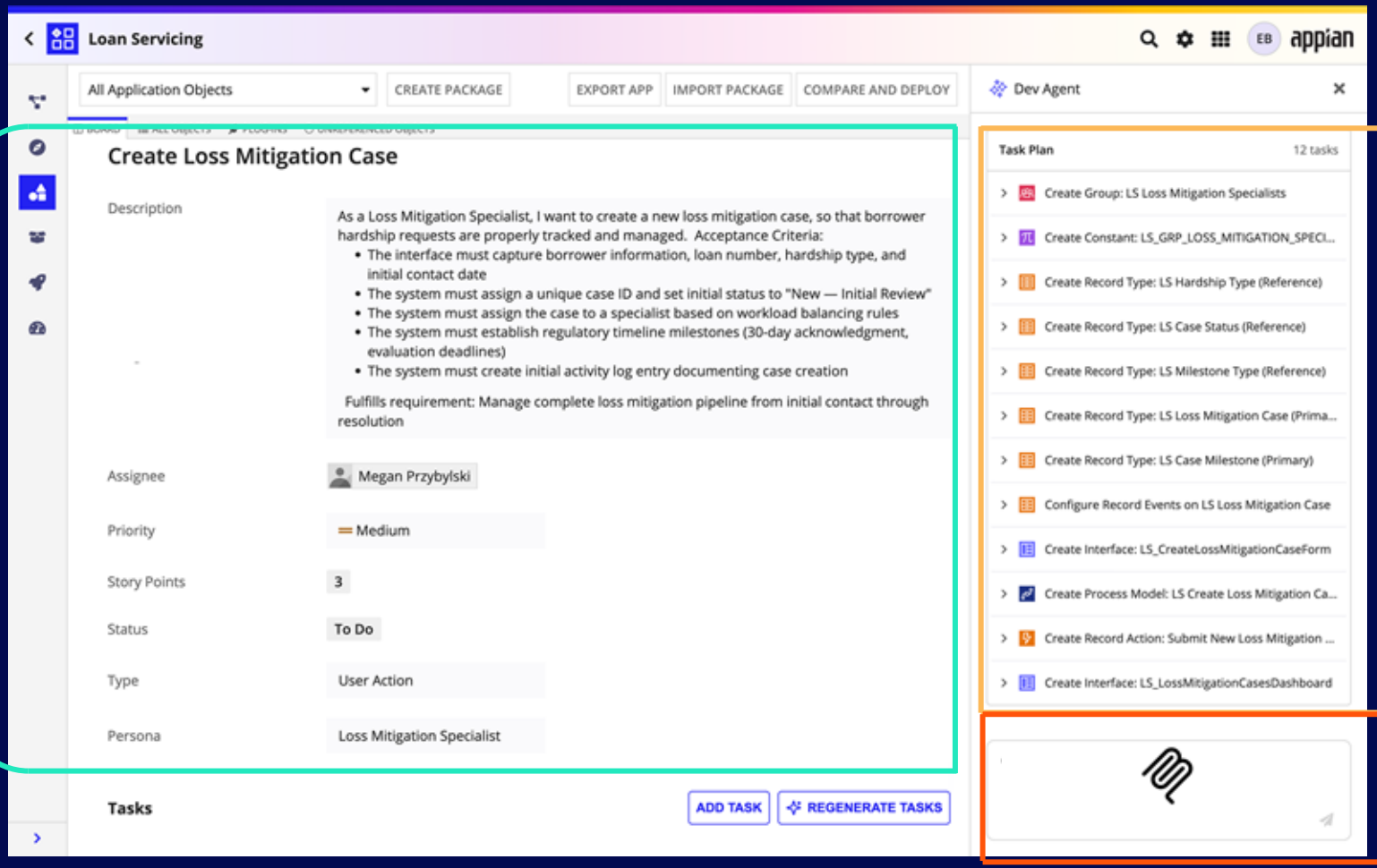
Ask Composer

Review AI-generated content to make sure it is accurate and appropriate. Learn more

SPEC-DRIVEN DEVELOPMENT EN APPIAN

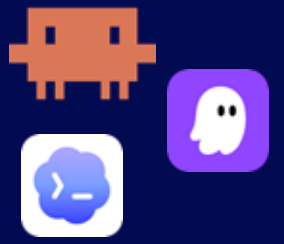
La IA detalla los requisitos de negocio

Negocio y TI los revisan y alinean



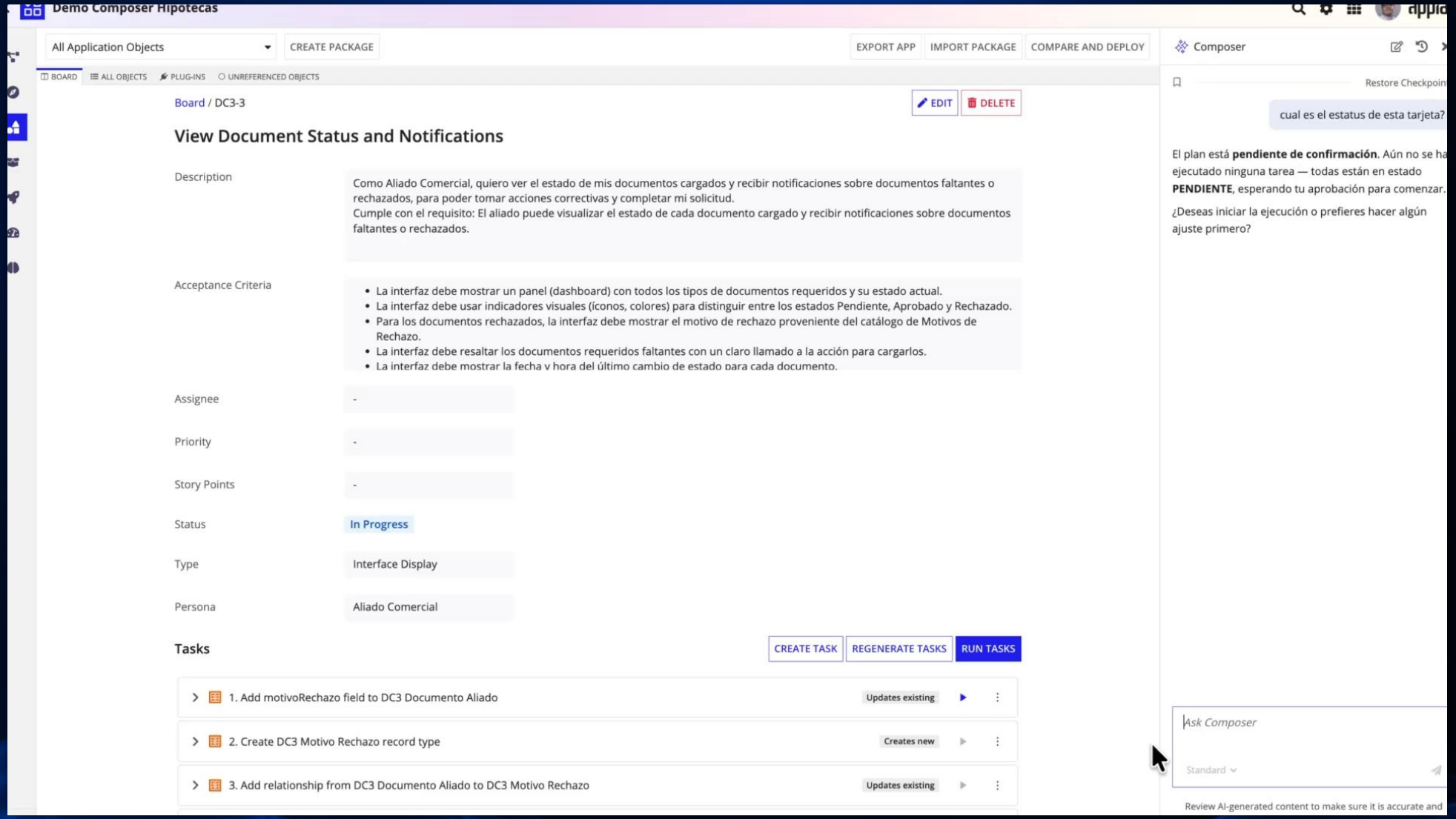
La IA identifica qué crear y cambiar

Las tareas pueden ser completadas por personas o agentes de desarrollo



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DEV AGENTS (COPILOTAJE PARA DEVELOPERS)



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Composer

- Visibility: members of cons!DC3_ALIADOS_COMERCIALES_GROUP (same as existing Registro page)

Restore Checkpoint

cual es el estatus actual?

¡El plan está **100% completado**! Todas las tareas han sido ejecutadas exitosamente. Aquí un resumen de lo que se construyó:

Modelo de datos

- Campo `motivoRechazoId` y `statusChangedAt` agregados a **DC3 Documento Aliado**
- Nuevo record type **DC3 Motivo Rechazo** (catálogo con 6 razones de rechazo)
- Nuevo record type **DC3 Tipo Notificacion** (Documento Rechazado, Documentos Faltantes)
- Nuevo record type **DC3 Historial Notificacion** (registro de notificaciones enviadas)
- Relaciones bidireccionales entre DC3 Documento Aliado y DC3 Motivo Rechazo

Filtros y vistas

- User Filters **Estatus Documento** y **Tipo Documento** en DC3 Documento Aliado
- Summary View registrada en **DC3 Historial Notificacion**

Interfaces

- **DC3_DocumentoAliadoSummary** actualizada con Motivo de Rechazo y

Ask Composer

Standard

Review AI-generated content to make sure it is accurate and appropriate. Learn more

Total Registros
16

Pendiente de Validación
4

En Revisión
3

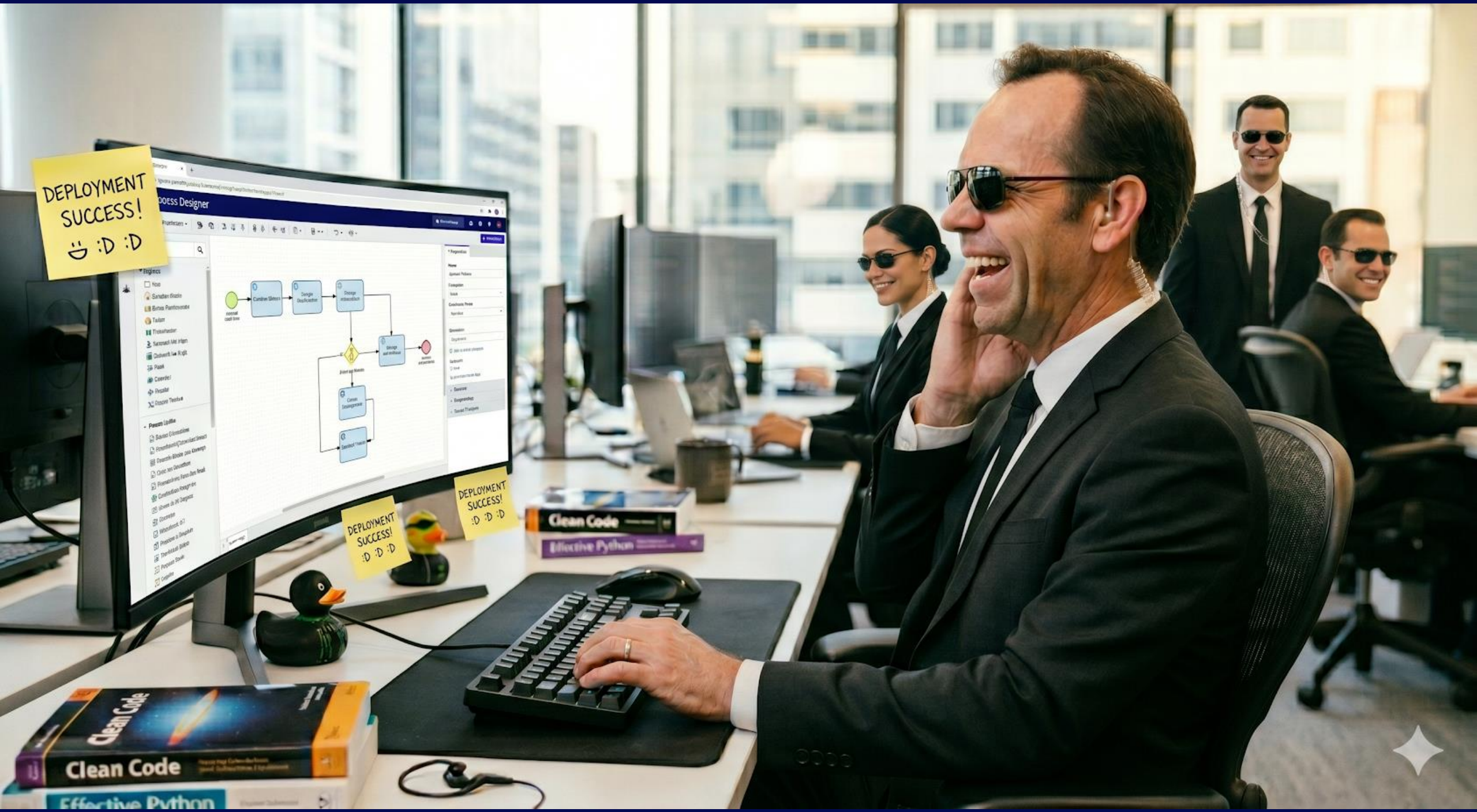
Rechazado
2

Activo
2

Aliados Comerciales

Search DC3 Aliados Comerciales | SEARCH | FECHA DE REGISTRO | Any - Any

Número de Referencia	Nombre de Empresa	RFC	Tipo de Empresa
REF-20261026-6507			—
REF-20241220-015	Consultora Estratégica Núñez	NUCA881005NOP	Persona Física
REF-20241215-014	Servicios Financieros Guzmán	GUZR720505KLM	Persona Moral
REF-20241210-013	Mueblería y Decoración Flores	FOLA940718HIJ	Sociedad Anónima
REF-20241205-012	Alimentos Naturales Vega	VESR860920EFG	Persona Física
REF-20241201-011	Logística Express Peña	PEJL910312BCD	Persona Moral
REF-20241120-010	Textiles Oaxaqueños Ruiz	RUGM830825YZA	Sociedad de Respon Limitada
REF-20241115-009	Farmacia y Droguería Moreno	MOGL950610VWX	Persona Física


DEPLOYMENT SUCCESS!
:D :D
DEPLOYMENT SUCCESS!
:D :D :D
DEPLOYMENT SUCCESS!
:D :D :D
Clean Code
Effective Python
Clean Code
Clean Code
Effective Python

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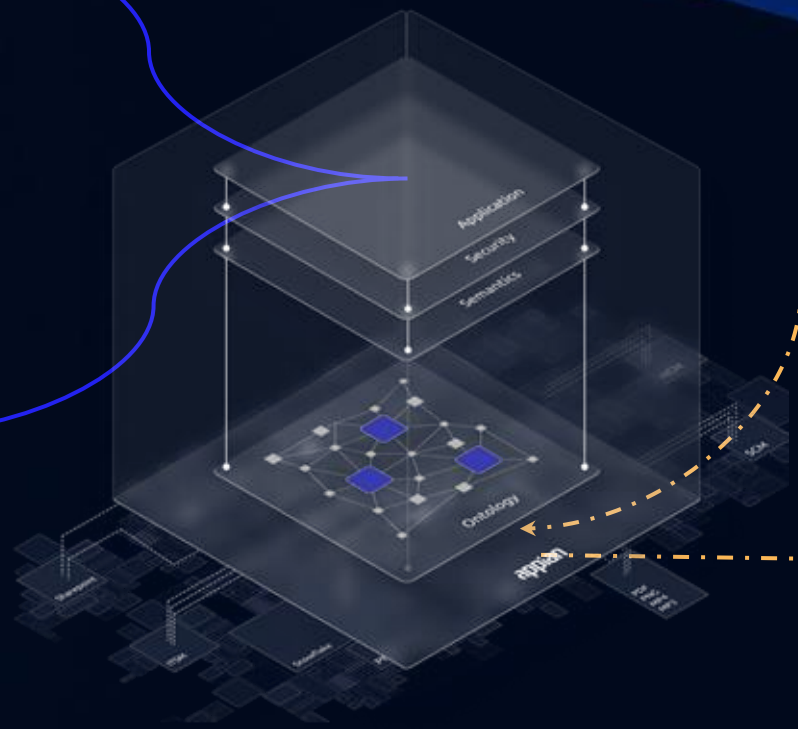
DocCenter, con más de 115 clientes, suma modelos **autoevolutivos**, **formatos complejos** y mayor procesamiento directo.

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CAPA DE CONTEXTO PARA AGENTES DE APPIAN Y DE TERCEROS

LangGraph

Potenciar Agentes con Contexto



Conectar Orígenes de Información

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INTEROPERABILIDAD DE AGENTES CON MODEL-CONTEXT PROTOCOL



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LO_LoanIntake

SAVE

EB

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Build | Evaluate | Monitor | Improve

Configure

Instructions

Explain the AI agent's goal and any specific instructions it needs to follow

Edit | Preview

You are the lead intake agent. Your job is to compare the applicant's extracted document data against our internal ledger, verify the associated property details, and route the application.

Lookup any active loan application to associate with this intake request.

Ensure you review underwriting and risk routing policy for latest guidance before making any final determination.

Look at the data for the retrieved application. Note the 'Stated Annual Income' and the property address. Execute the Customer_Ledger tool using the applicant's SSN. Compare the Stated Income against tl2008/64000

Tools (4) | Inputs (1) | Outputs (2) | Advanced

Add tools to give your AI agent access to data and the ability to perform actions

+ ADD

LO Customer Ledger
Sourced from Core Banking System (CBS). Captures financial transaction details to support customer account man...
More

LO_Fraud_Agent
Looks for fraud markers

LO Automated Underwriting & Risk Routing Policy
Document containing bank's current underwriting guidelines and risk thresholds.

LO Loan Application
Record of all submitted loan applications

Test

Test your AI Agent

Enter input values for the AI agent, then select Test to see a response

Load Inputs

LOAD FROM TEST CASES

CLEAR INPUTS

customerId

Text

Enter a value

Abc

TEST

Cotizaciones de seguro de auto

COTIZACIONES **23**

POR APROBAR **5**

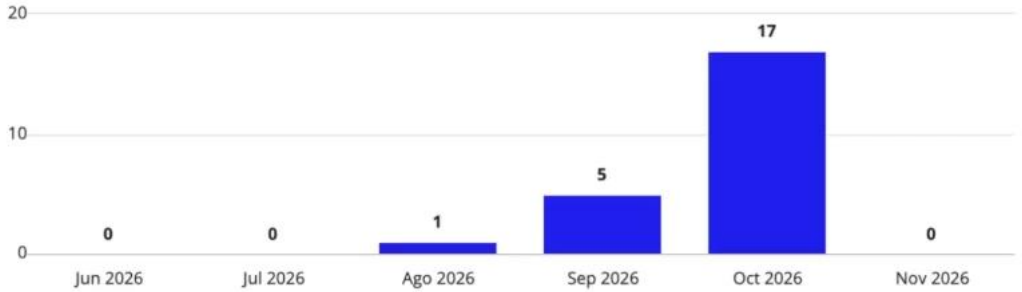
APROBADAS **11**

RECHAZADAS **3**

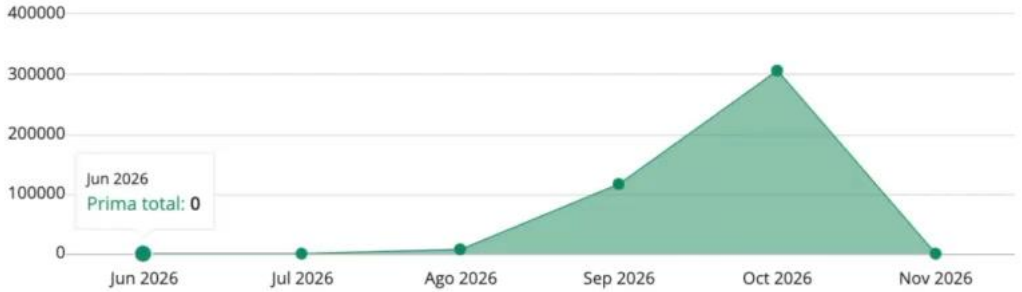
ALERTAS
Cotizaciones aprobadas por vencer en los próximos 10 días

COT-2026-000015 Prueba Etapa Cuatro	$8,269.64	Vence en 4 días
COT-2026-000001 María Fernanda López	$22,518.50	Vence en 2 días

TENDENCIA DE COTIZACIONES
Nuevas cotizaciones por mes, últimos 6 meses



PRIMA TOTAL POR MES
Suma de primas cotizadas por mes



POR ESTADO

Pendiente de aprobación	5
Aprobada	11
Emitida	2
Rechazada	3
Borrador	1

POR NIVEL DE RIESGO

Riesgo bajo	8
Riesgo medio	12
Riesgo alto	3

Riesgo alto 3

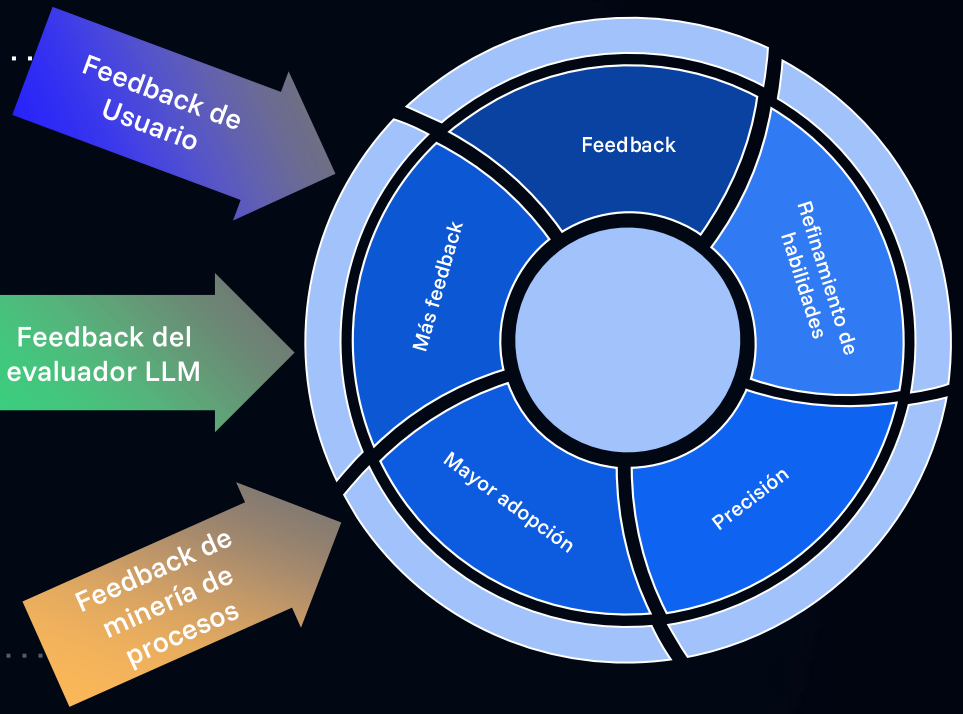
AUTO EVALUACION DE AGENTES

Aprenden desde el Feedback

"Los agentes almacenarán la retroalimentación pasada como memoria procedimental, mejorando las decisiones de la IA y optimizando los resultados comerciales con el tiempo..

Mejora Futura

Mejora Futura



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Evaluation Details

Start Time
5/6/2026, 12:30:52 AM

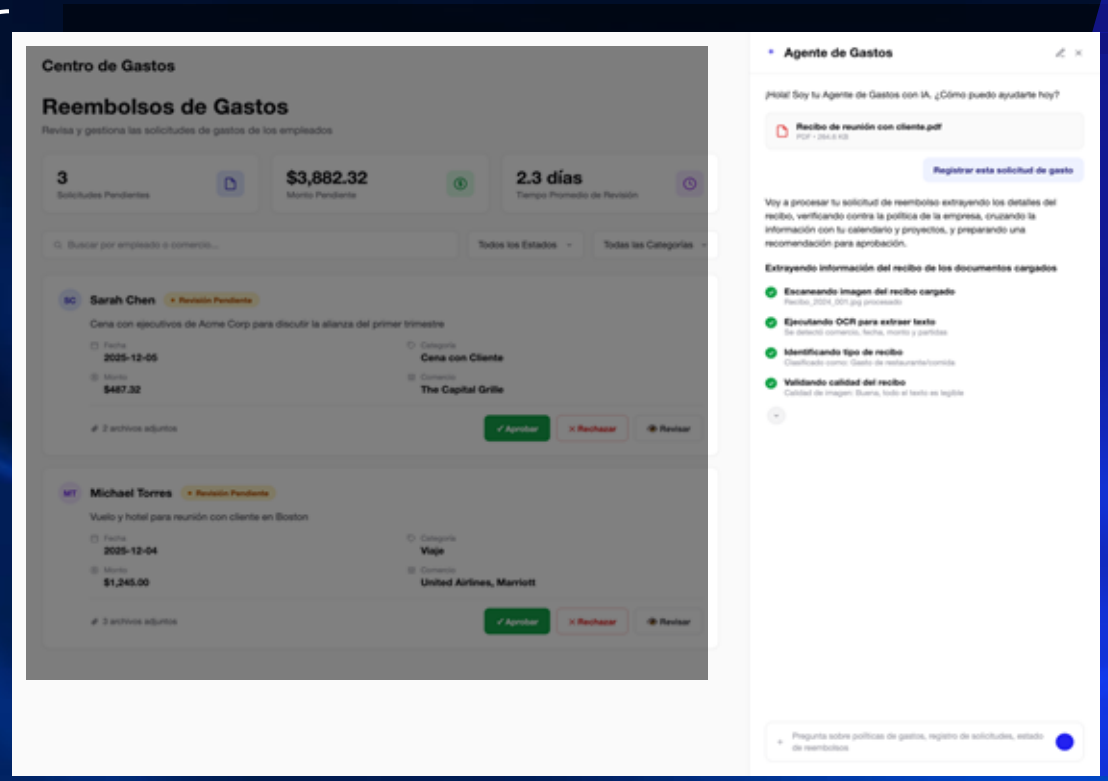
Accuracy	Total Tests	Average Duration
100%	10	106.4s
10 feedback scores	10 of 10 tests completed	Total duration: 1064.3s

Test Cases (10)

Olivia Anderson - Medium Risk (CUST-010)	1 feedback score	100%
William Taylor - Low Risk (CUST-009)	1 feedback score	100%
Jessica Moore - High Risk (CUST-008)	1 feedback score	100%
James Wilson - Low Risk (CUST-007)	1 feedback score	100%
Emily Davis - Medium Risk (CUST-006)	1 feedback score	100%
David Brown - Low Risk (CUST-005)	1 feedback score	100%
Sarah Williams - High Risk (CUST-004)	1 feedback score	100%
Michael Johnson - Medium Risk (CUST-003)	1 feedback score	100%

INTERACTUAR CON LOS AGENTES DE APPIAN

Los usuarios podrán interactuar con agentes incrustados en las aplicaciones de Appian, aumentando la productividad al pasar de agentes aislados ¡ a agentes interactivos !





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RISK FLAG *ID Address Mismatch. Cannot proceed to approval.*

Applicant's Info

Information as submitted by the applicant and extracted from uploaded documents.

Applicant Name
Michael Johnson

Loan Purpose
Home Purchase

Application Address
789 Pine Ln, Denver, CO

Requested Loan Amount
350000

Government ID Address
9876 Flatirons Way, Boulder, CO

Submitted Documents

W-2 Tax Form (2025)	Extracted
Proof of Address	Extracted
Government ID	Flagged

AI Investigation Findings

Automated analysis generated by the AI Intake, Fraud Detection, and Core Banking agents.

Agent Confidence Scores

Data Extraction
99.2%

Income Verify
99.8%

Identity Verify
Flagged

Key Findings

- **Address Mismatch** - Application address (Denver, CO) contradicts Driver's License address (Boulder, CO)
- **Missing Stipulation** - Proof of residency at Denver address is required
- **Approval Blocked** - Underwriting cannot proceed until identity exception is cleared

Multi-Agent Audit Log

3 agents involved

Intake Agent successfully extracted application data. However, the Fraud & Identity Sub-Agent detected a compliance discrepancy: The address on the uploaded Colorado Driver's License (Boulder, CO) does not match the current residential address provided on the loan application (Denver, CO). Manual review and external verification required to proceed.

Underwriter Assistant

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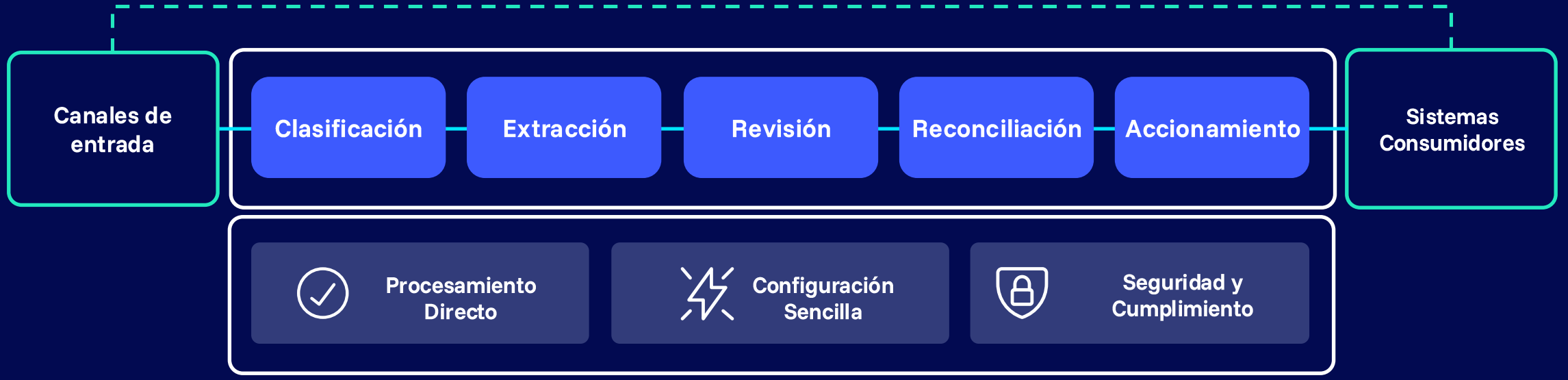
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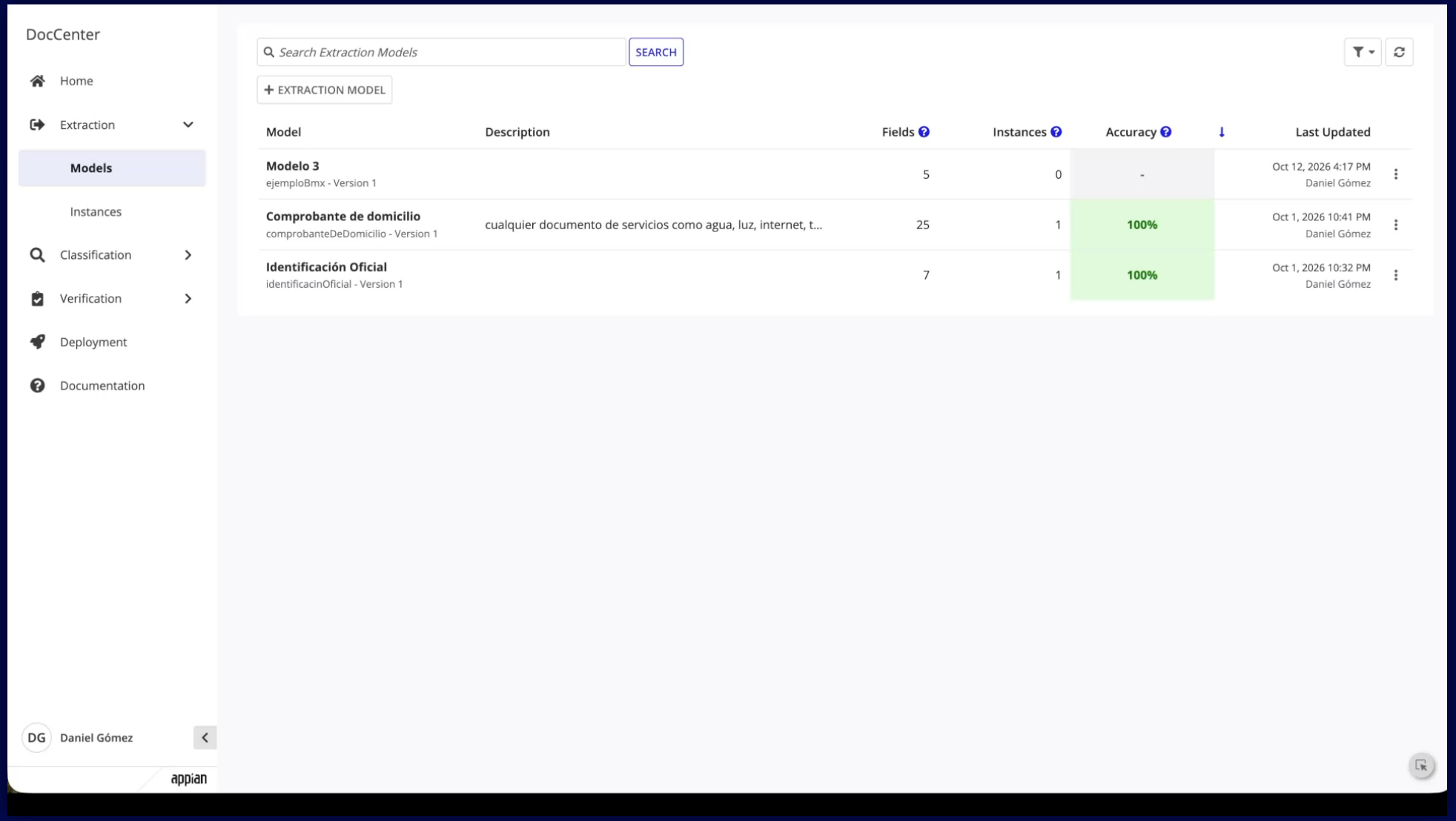
AUTOMATIZACIÓN DE DOCUMENTOS DE PRINCIPIO A FIN: BASADO EN EL PROCESO



EVALUADO #1 en casos de uso de Procesamiento Automatizado para IDP por Gartner®

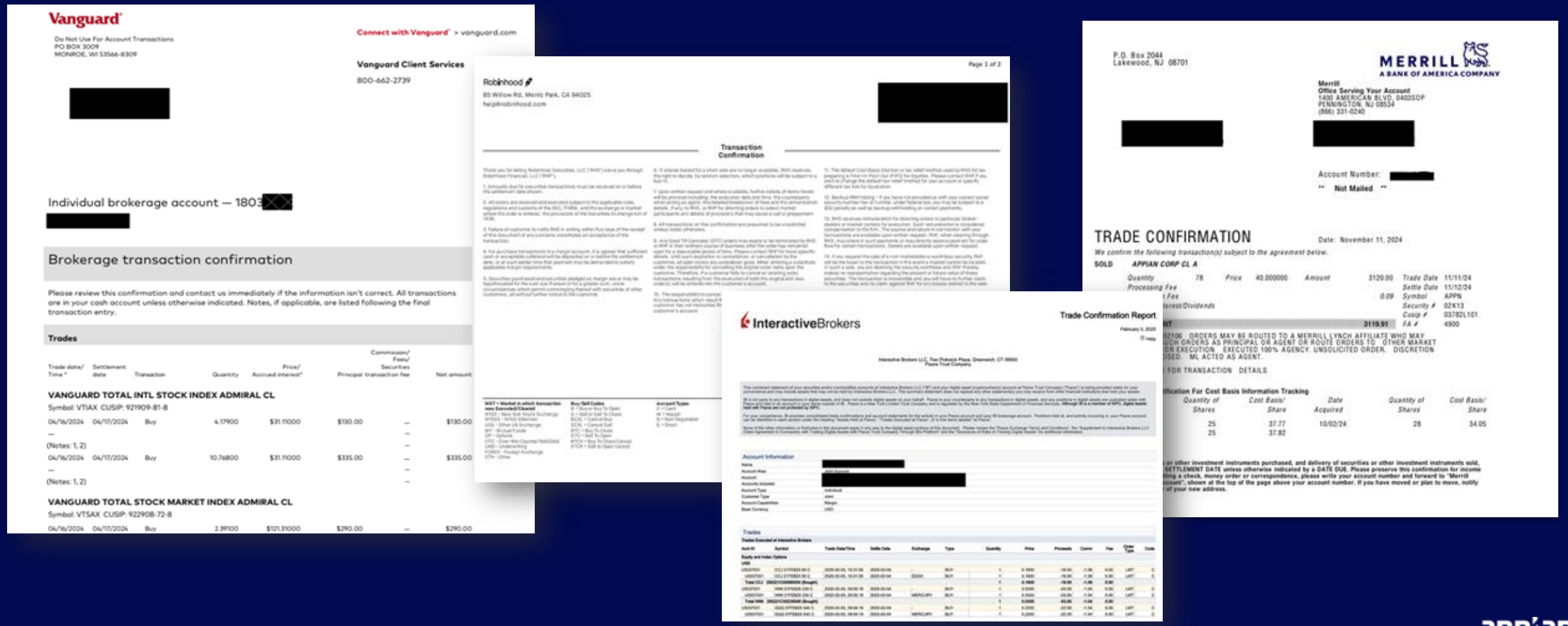
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MODELOS CON IA GENERATIVA



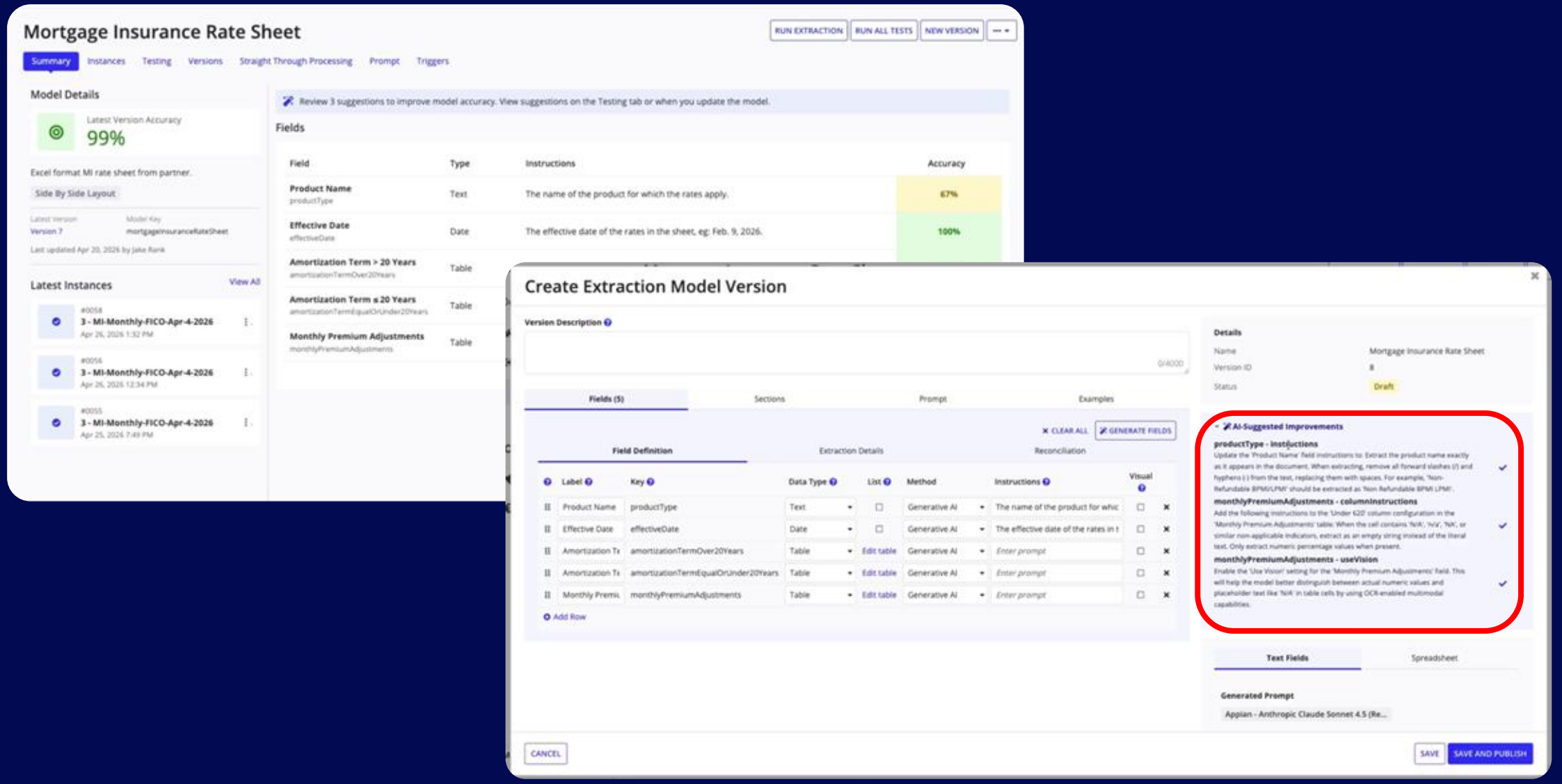
appian

Extracción y clasificación de documentos no estructurados.

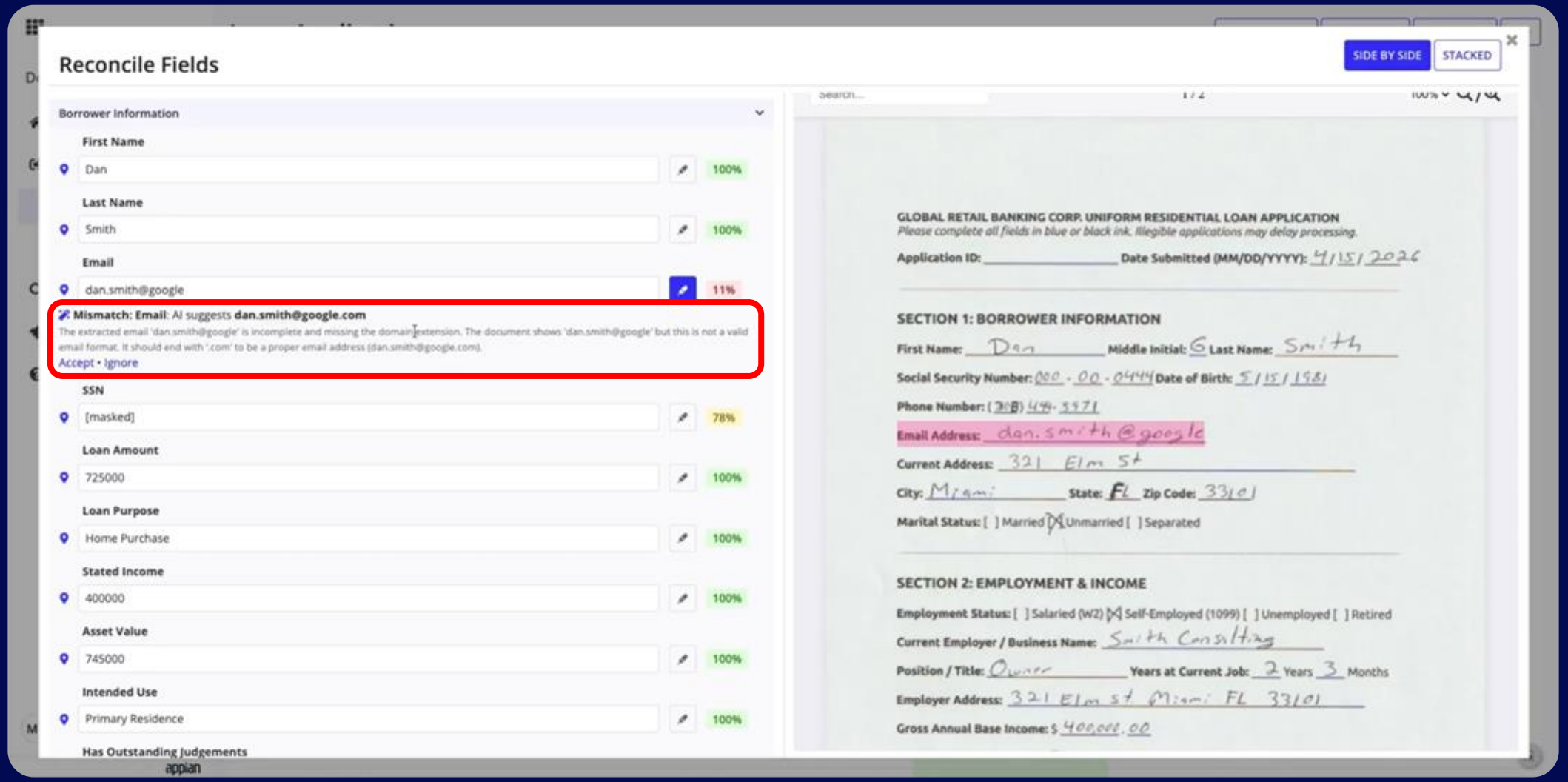


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AUTOAPRENDIZAJE

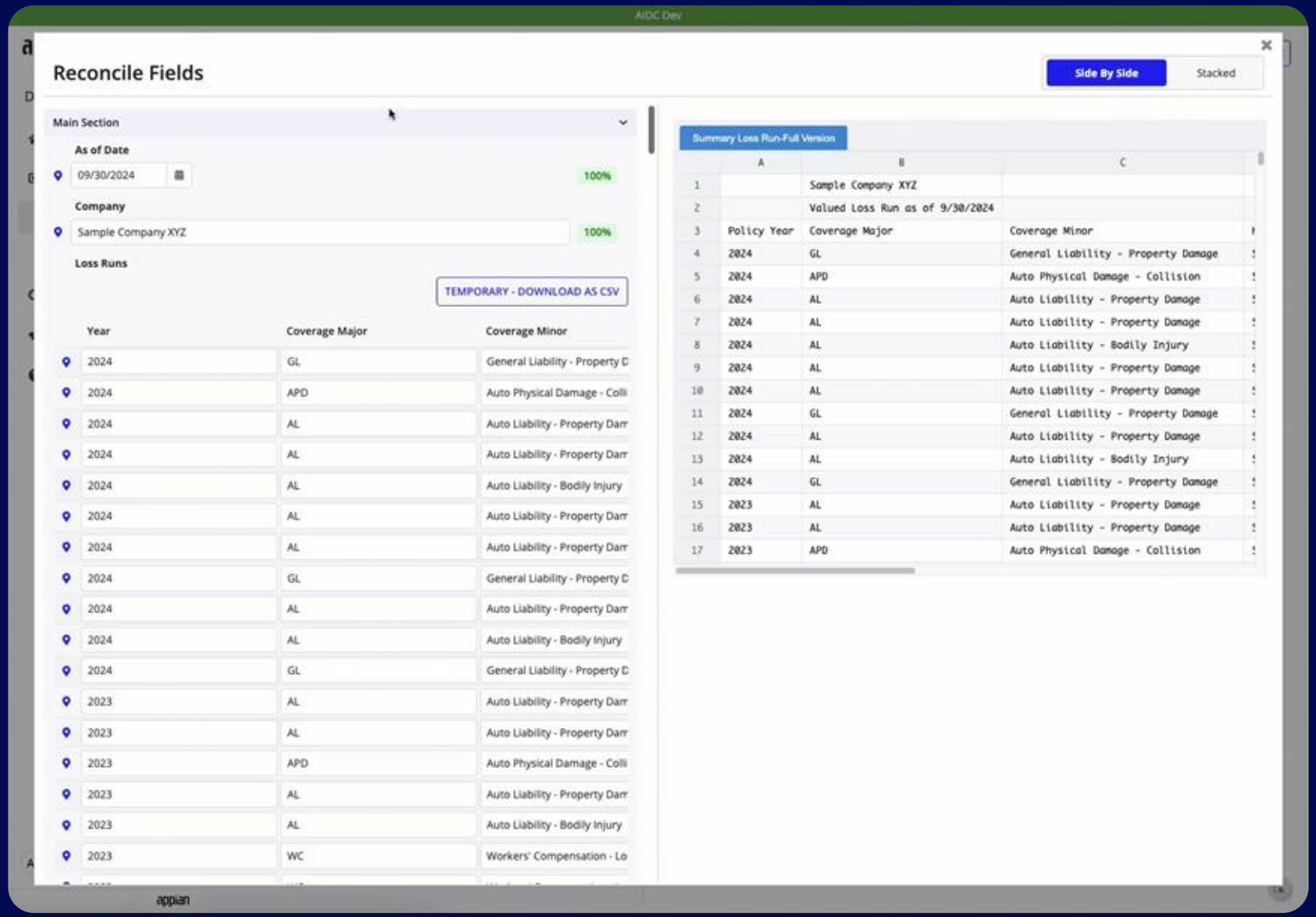


SUPERVISION Y REVISION



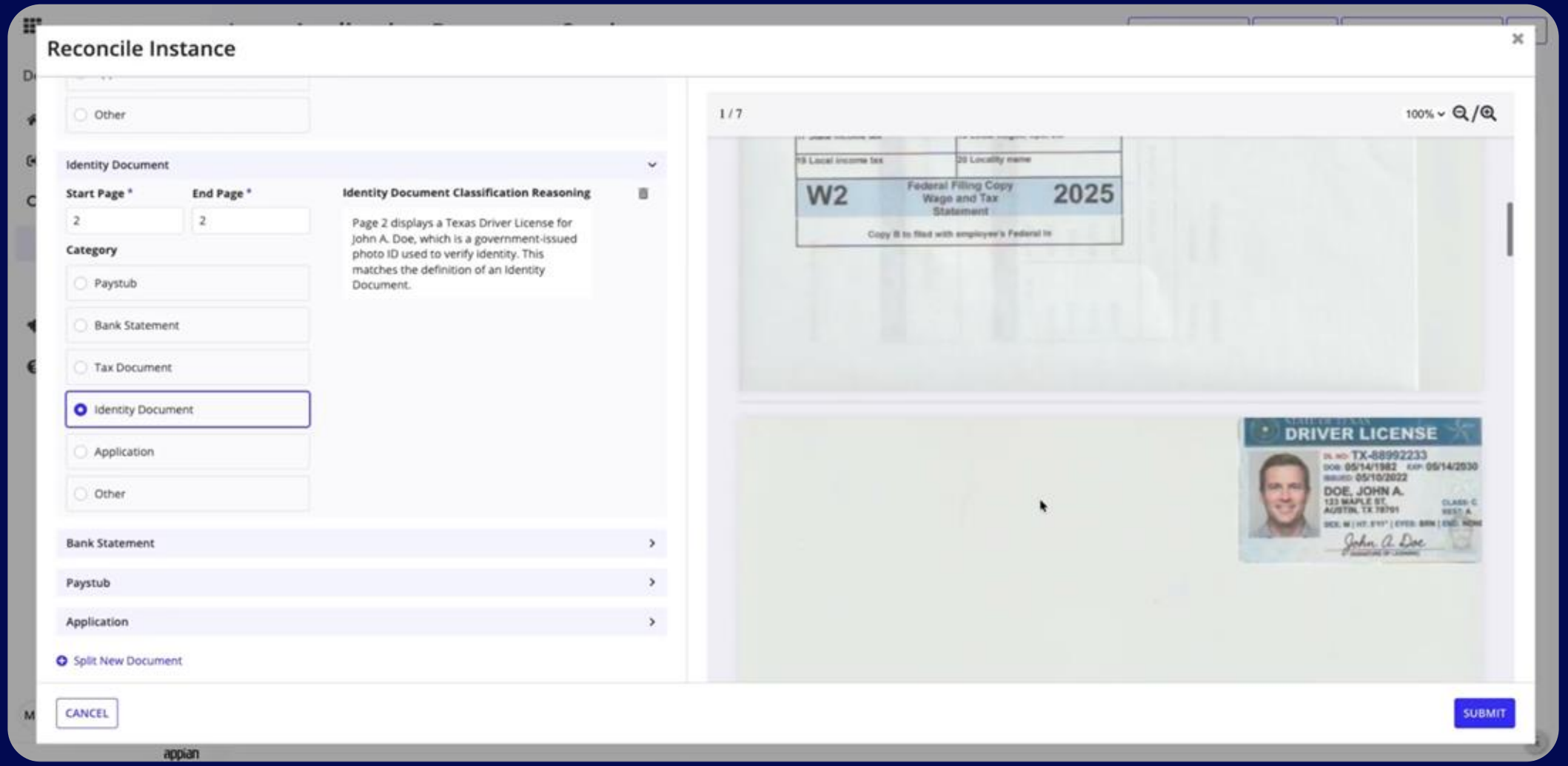
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EXTRACCION DE EXCEL NATIVO



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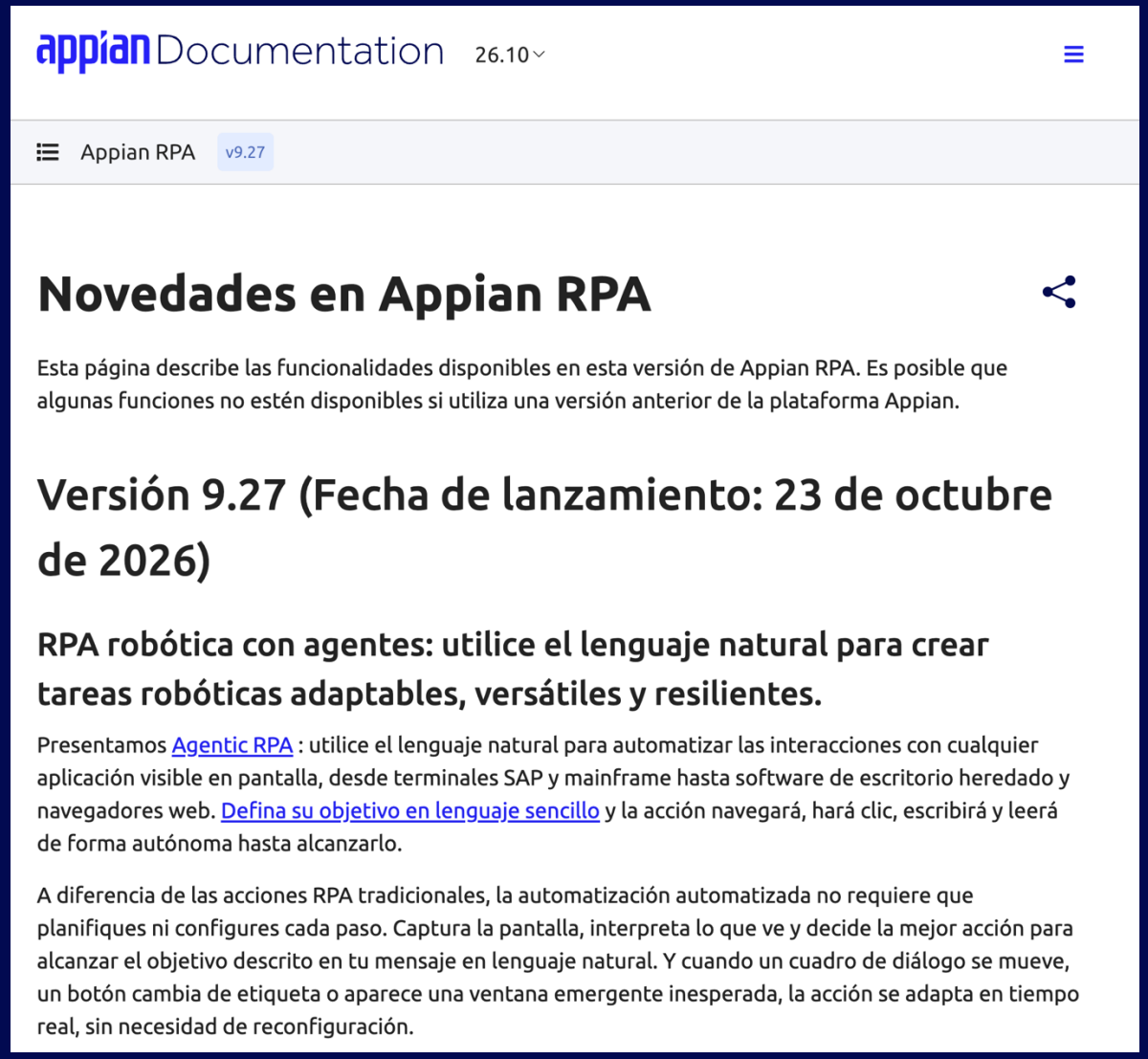
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BREAKING NEWS
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BREAKING NEWS

RPAs AGENTICOS



appian Documentation 26.10

Appian RPA v9.27

Novedades en Appian RPA

Esta página describe las funcionalidades disponibles en esta versión de Appian RPA. Es posible que algunas funciones no estén disponibles si utiliza una versión anterior de la plataforma Appian.

Versión 9.27 (Fecha de lanzamiento: 23 de octubre de 2026)

RPA robótica con agentes: utilice el lenguaje natural para crear tareas robóticas adaptables, versátiles y resilientes.

Presentamos Agentic RPA : utilice el lenguaje natural para automatizar las interacciones con cualquier aplicación visible en pantalla, desde terminales SAP y mainframe hasta software de escritorio heredado y navegadores web. Defina su objetivo en lenguaje sencillo y la acción navegará, hará clic, escribirá y leerá de forma autónoma hasta alcanzarlo.

A diferencia de las acciones RPA tradicionales, la automatización automatizada no requiere que planifiques ni configures cada paso. Captura la pantalla, interpreta lo que ve y decide la mejor acción para alcanzar el objetivo descrito en tu mensaje en lenguaje natural. Y cuando un cuadro de diálogo se mueve, un botón cambia de etiqueta o aparece una ventana emergente inesperada, la acción se adapta en tiempo real, sin necesidad de reconfiguración.

Automatiza cualquier aplicación visible en pantalla describiendo tu objetivo en lenguaje natural:

Appian Agentic RPA interpreta la interfaz, navega, hace clic, escribe y se adapta en tiempo real a cambios y pop-ups inesperados, sin reconfigurar tu robot.

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BREAKING NEWS

Y un poco más...

Mejora la depuración y la experiencia de usuario en chats.

- **26.9 – Estilo avanzado en a!agentChatField()**
  Nuevos parámetros de forma de las esquinas y borde externo en el componente de chat de agente. Permiten adaptar la apariencia del chat a la identidad visual de la aplicación.

- **26.9 – Visualización en tiempo real de llamadas paralelas a herramientas**
  Cuando un agente ejecuta varias herramientas en paralelo, cada resultado aparece en cuanto termina, con duración, inputs, outputs y razonamiento. Ayuda a detectar rápidamente herramientas lentas o con errores y afinar el comportamiento del agente.

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Exclusively to Appian Around the World attendees

The AI Sprint Lab is a high-impact, 1:1 workshop designed for organisations ready to turn AI ambition into real, executable outcomes.

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In just half a day to a full day, you'll work side-by-side with Appian experts to design and prototype solutions tailored to your organisation.

Register your interest

¡Gracias!

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