Appian

The discussion topics:-

- Records
- Reports
- Sites

Records

Definition:-

A record is a place to view information about and take action on essential business objects or processes. For example, a shipping company may have records for vehicles, customers, and locations. But it's not just the most visible and long-lived concepts that work well as records—the shipping company may also have records for fleet maintenance, truck rentals, customer status, and purchase orders. That's because records provide a centralized view of a given object, along with all of its connections to related records.

Related Actions

Related actions allow you to start a process from the context of a specific record. For example, a customer record may have a related action called Update Customer Details

Concepts:-

- Appian Records enable you to do more with your data.
- Regardless of where your data lives, Appian allows you to organize your data into actionable records that allow users to access and update the information that they need.
- For example, think about an employee record. What information about the employee would you want to see? You'd probably want to have the employee's name, title, department, and start date readily available. What might you want to do? At some point you would likely have to update the employee's information. You might also need to add a new employee. These common actions can be directly added to your record type and can be referenced in other interfaces and processes.
- Each record has three default views: Summary, News, and Related Actions. Some records have custom views. For example, this record has additional views called Details and Orders.

Phases of Record Creation

- Record types are made up of your data, the record list, and the records themselves.
- Creating a record type in three phases:
  - Adding the source data,
  - Configuring your record list, and
  - Creating your record views and actions.

Objectives

1. In the first phase, we will bring together our data and record type to begin connecting our users with the data. To do this, we will:
   - Create our record type.
   - Add the data to our record type.
2. In the second phase, we will structure the way that our users will initially interact with the set of records through the record list. To do this, we will:
   - Configure the record list by selecting which columns we want to see in the list.
   - Create a user filter for users to be able to filter the records in the list.
3. In the third phase, we will create a way for users to drill into and act upon each record. To do this, we will:
   - Configure the record views so that users can see specific record data.
   - Configure related actions to allow users to update the record that they are viewing.

Phase-1 : Adding the Source Data

- No matter where your data lives, you can add it as a source for your record type.
- Before we configure the ways that users will view or act upon the records, we need to first point the record type to the data source.
- In the first phase, we will be creating our record type, naming it, setting security, and using the data from our DSE as our data source

Phase 2: Configure your record list

- The record list displays all of the records, shows a few fields of key information about each record, and allows users to easily filter records.
- Users can also create new records directly from the record list with a list action.
- In the second phase, we will be configuring the record list by selecting the columns of data that the users will want to see displayed in the list.

Phase 3: Create your record views and actions

- In the final phase, we will be configuring the records within the record type by creating a record view and a related action.
- Record views can display relevant information about a user in each record. Our summary view will show information about each employee, but you can configure record views to show a variety of relevant and related information. These could be expense reports, time off requests, or issued employee equipment.

REPORTS

- Reports allow you to visualize aggregated data.
- Look for tooltips, links, filters, and drillable elements to find more information about items of interest in a particular report.

Tempo Reports

Definition

- Appian UI framework that unifies all your business applications in a single location.
- Provides Social Collaboration, Data Navigation and Process Actions in a single interface.
- Tempo reports are a way of pulling in data from tasks, records, relational databases, and other third-party data sources and displaying it on a single interface in Tempo for end users to view. Through the use of rules, interface components and expressions, Tempo reports enable designers to quickly define what data to display and how to display it in a usable and concise way on both web and mobile clients.

Tempo Reports

Standardized End-User framework, such that all the applications fit within that same framework and expose end-user capabilities through 5 features.

Features of a Tempo Report:-

- News
- Tasks
- Records
- Reports
- Actions

News

The News feed allows you to see key business events so that you and your team can collaborate to influence business processes and make decisions.

Posts and Messages

Posts and messages allow you to collaborate with other users outside of a process or task: • A post is a public entry that appears in the News feed of your followers and any users and groups added as participants. Posts are searchable by any user. • A message is visible and searchable only by users and groups who have been added to it. Messages are a more private way to collaborate.

Following Users and Records

The content that appears in your News feed is tailored to your role in your organization. What you see depends on the security settings configured by your organization, but you can also customize your News feed by following users and records.When you follow a user, posts from that user will show up in your News feed, even if you are not added as a participant. Similarly, when you follow a record, news entries tagged with that record will appear in your News feed.

Tasks

- Tasks are the primary way to complete work in Appian. There are two kinds of tasks: tasks assigned as a part of a process and social tasks sent to you by another user. Social tasks allow you to share files and collaborate with others
- A task that is assigned to you as a part of a process may also be assigned to other users or groups.

Actions

- Actions allow you to start a process based on knowledge of existing processes and work. Go to the Actions tab to see a list of actions that are available to you.
- Actions differ slightly from tasks and related actions. Unlike related actions, actions are not started from the context of a record, and unlike tasks, actions are not assigned to a group or an individual. Instead, an action is a process that may be started at any time.

Creating a Tempo Report

Tempo reports can be created by any user in the designer role.

Creating a report involves the following:

1. In an application, use the **New** menu and select **Interface** to create an interface that returns the components to display in the report
2. Use the **New** menu and select **Report** to create the Tempo report.

See the following interface recipes for examples of creating charts using a!queryEntity():

- **Aggregate Data from a Data Store Entity and Conditionally Display in a Chart or Grid (*Reports, Charts, Query Data, Grids*)**: Aggregate data from a data store entity, specifically the total number of employees in each department, to display in a pie chart.

- **Aggregate Data from a Data Store Entity and Display in a Chart (*Reports, Charts, Query Data*):** Aggregate data from a data store entity, specifically the total number of employees in a given department, to display in a pie chart.

Interface Recipes

- **Aggregate Data from a Data Store Entity by Multiple Fields and Display in a Chart (*Reports, Charts, Query Data*):** Aggregate data from a data store entity by multiple fields, specifically the total number of employees for each title in each department, to display in a stacked column chart.

- **Aggregate Data from a Data Store Entity using a Filter and Display in a Chart (*Reports, Charts, Query Data, Filtering*):** Aggregate data from a data store entity, specifically the total number of employees for each title in the Engineering department, to display in a bar chart.

- **Configure a Chart Drilldown to a Grid (*Charts, Grids, Query Data*):** Display a pie chart with aggregate data from a data store entity that the user can interact with to display related chart data.

- **Filter the Data in a Grid Using a Chart (*Charts, Grids, Filtering*):** Display an interactive pie chart with selectable sections so that a user may filter the results in a grid.

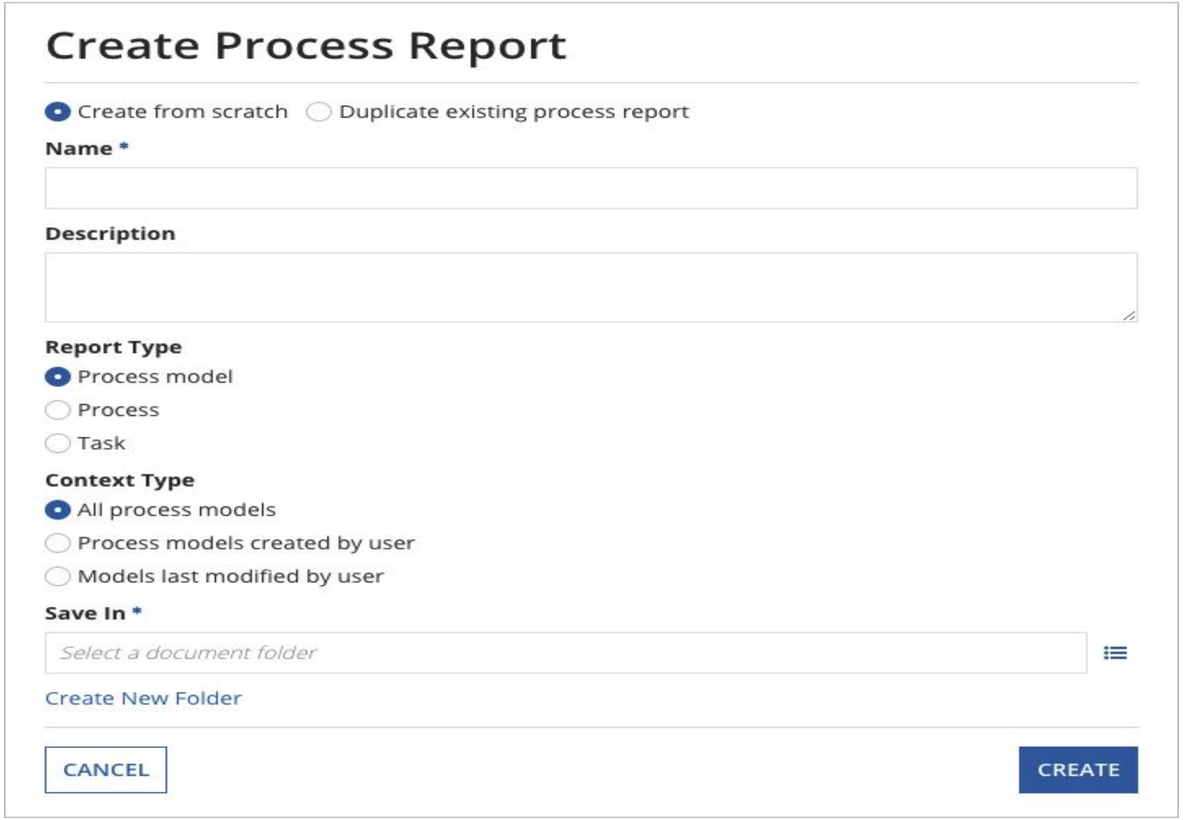
- **Use a Filter to Adjust Chart Reference Lines (*Filtering, Charts*):** Using a dropdown, filter the results of a data set while also adjusting a chart reference line.

Process Reports

- Appian process reports pull data from process models, process instances, or active tasks and other activities.
- Each process execution engine is paired with an analytics engine to gather the real-time report data contained in your active processes.

Creating a Process Report

New process reports are created in Appian Designer by clicking the **New** menu from the application view, and select **Process Report**.



Types of Process Reports

Process Model Report Type

Process model reports gather data from different process models. There are three context options for these report types:

- **All Process Models**
- **Models created by a particular user**
- **Models last updated by a particular user**

By default, when a process model report is created is will start with the following columns of data:

- process model name
- process model description
- process model creator

Types of Process Reports

Process Report Type

Process reports gather process data from all executed process models, from each execution of a single process model, or from each process executed by a single user. There are three context options for these report types:

- **All Processes**
- **Processes initiated by a particular user**
- **Processes by process model**

By default, when a process model report is created is will start with the following columns of data:

- **process name**
- **process status**
- **process start time**

Types of Process Reports

Task Report Type

Task report types gather task-related data. Select this report type if you need to report on task completion and status. Task reports list tasks that are Accepted, Assigned, and Paused. The context for task report type are as follows:

- **Tasks attributed to user**- lists tasks with Accepted, Assigned, and Paused status for specified users.
- **Tasks assigned to group**- lists tasks with Assigned and Paused status for specified groups.
- **Tasks by owner**- lists tasks with Accepted, Assigned, Paused, Completed, Cancelled, and Cancelled by Exception status for specified users.
- **Tasks by process model**- lists tasks with Accepted, Assigned, Paused, Completed, Cancelled, and Cancelled by Exception status for selected process models.
- **Tasks by process**- lists tasks with Accepted, Assigned, Paused, Completed, Cancelled, and Cancelled by Exception status for selected process instances.

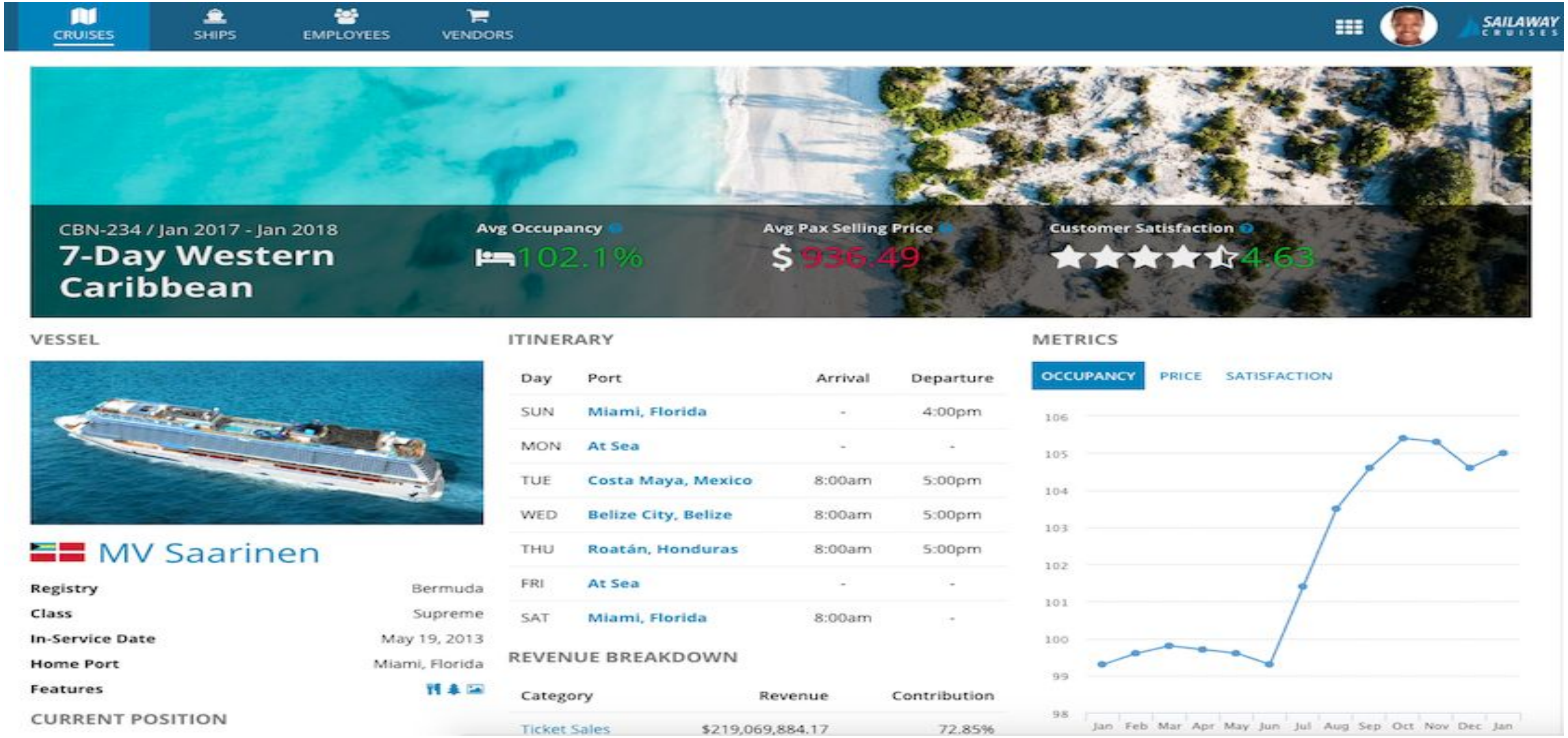
Difference between Tempo and Process

- Tempo reports can easily be modified through their expression, be viewed on mobile devices and the broad set of web browsers supported by Tempo, and report on data from tasks, records, and relational databases. process reports can only be viewed from the Portal and can only report on data from process models, processes, and tasks.

- These continue to work as before in the legacy Portal interface as part of Appian. As you migrate your application to Tempo, you can design Tempo reports for each process report, including Task Reports, and access these from the Tempo interface

SITES

- Sites provide a customized user experience that is focused on a specific set of functionality.
- Designers can create sites with a business-oriented navigation experience and terminology their users are familiar with.



Designing Sites

Sites can be created in Appian Designer and further configured in the site designer.

Create a New Site

1. In Appian Designer, open the application that you want the site to be in.
2. From the **New** menu, click **Site**. This will display the *Create Site* form.
3. Enter in a name.
4. Optionally enter a description and web address identifier.
5. Select **Create** to create the site and open the site designer to continue configuring it.

The site designer allows you to edit a site's properties, configure the contents of the site, and add custom branding for the site.

Using Sites

Users have a few ways to access sites:

- Directly by URL. Either the site or a specific site page can be targeted.
- Via the navigation menu in Tempo or another site. This will open the site in a new window and display the first page.

Navigation Menu

- Using the site navigation menu, users can easily access other sites, Tempo, and other workspaces they have access to.
- The designer can also configure the menu to appear as the site name or as an icon. If the designer has configured the Tempo link to appear on the site navigation menu, it will always display at the top of the available sites.
- If the user only has access to their current site, the site navigation menu will not be shown.

Pages

- Pages allow the designer to add content to the site. Each site can contain up to 5 pages that can be configured to show an action, a report (task report or Tempo report), or a record type.
- Pages are used to organize the content in a site. Users can navigate between site pages by clicking on the site page name or navigating via keyboard.
- To refresh the current site page a user is on, they can click or select the site page again. A site page can be configured to be one of three different types: action, record type, or report.

Site Branding

The branding section allows designers to customize the look and feel of a site. These configurations can be set as static values or dynamic values using expressions for greater flexibility.

Use the **Branding** section of the site designer to modify the site logo, favicon, and colors.