

Appian

Converting Portal User Interfaces to Tempo Best Practices

Appian 7.7

NOTE: This site does not include documentation on the latest release of Appian. Please upgrade to benefit from our newest features. For more information on the latest release of Appian, please see the [Appian 7.8 documentation](#)

The information on this page is provided by the Appian Center of Excellence

[Toggle Na](#)

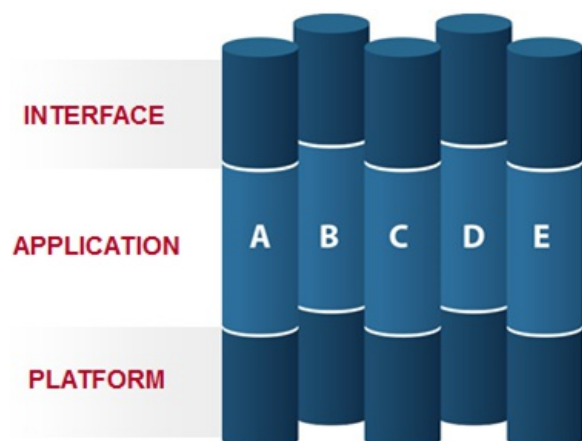
This page is *not* supported by Appian Technical Support. For additional assistance, please contact your Appian Account Executive to engage with Appian Professional Services.

Overview

This guide will help you strategize about converting your Portal user interfaces to Tempo interfaces.

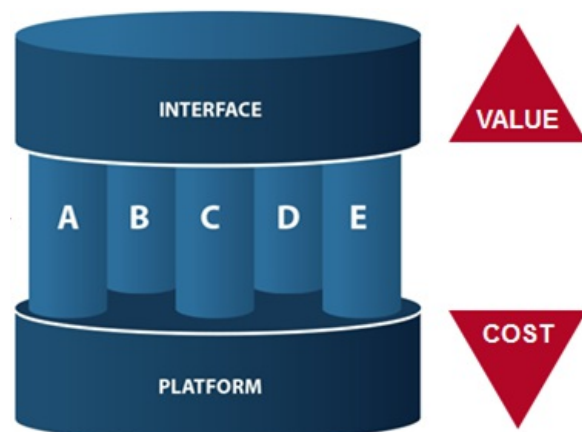
Portal Applications

Legacy portal applications are separated and siloed by nature. They are composed of their own pages and dashboards and the users navigate between them using the applications list. Different applications will often have dramatically different user experiences, leading to confusion and increased training costs as the number of applications grows. In addition, portal applications offer little opportunity for collaborating outside of limited capabilities that a designer can implement.



Tempo Applications (Work Platform)

Tempo introduces a fundamental change to the way applications are built and how users interact with them. Tempo provides a common interface across user activities to avoid work being performed in silos. It provides users with a consistent interface to easily and intuitively collaborate. Users no longer need to think about and switch between applications they have access to, instead, they can concentrate on quickly and efficiently completing their outstanding tasks.



Why Convert to Tempo?

Tempo provides a modern, cross-platform unified interface that requires less training than traditional siloed applications.

All Tempo interfaces are built using SAIL, allowing designers to create rich, dynamic interfaces that change with the process and present the most relevant and useful information at the right time without the need to write and maintain complex JavaScript.

SAIL reduces development and maintenance costs by making it very easy to reuse interfaces and sub-sections.

Tempo also offers new functionality which introduces new design patterns that make applications more efficient, more intuitive, and easier to maintain as they evolve.

Converting Portal Concepts to Tempo

Users coming from portal will need to become familiar with a different navigation paradigm in Tempo. In portal, users switch between their individual applications and they need to be familiar with the different navigation and actions each provides. In Tempo, the navigation is separated into 5 core tabs that unify the navigation across the tasks and actions users can perform.

Portal typically provides multiple different applications or dashboards to expose data and functionality that is actually part of the same core business entity. In Tempo, Records unify data and functionality by modelling the real business entity. Records provide the single point for users to access always up-to-date information (tailored to their access rights) and perform actions.

Converting to Tempo is usually performed in phases. Identify the most important functionality and convert that first (e.g., are users asking for mobile support on specific interfaces and actions?). Converting to Tempo doesn't require the portal interfaces to be disabled, they can usually be deployed in parallel as long as the source of the data in both interfaces is synchronized.

Tempo Feature	Explanation	Portal Equivalent/Analog
News Tab	The platform landing page where users collaborate together and around business events.	While portal applications may have included Discussion Forum capability, the News feed represents a re-envisioning of discussions and should not be considered a direct analog.
Tasks Tab	The Tasks tab lists all tasks assigned to the user.	The default Tasks application in the portal interface.
Custom Task Reports	Additional task reports that can be added to the Tasks tab which can provide domain-specific task information.	Application-specific tasks reports usually placed on application pages or process dashboards.
Records Tab	The list of available Record Types and lists of records for each record type. Filters and searching allow users to quickly find the data they need. Reports can represent data in databases, processes, or external systems.	In portal, data was often displayed in different applications which contained reports of process instances that represented data.
Record Views	Collection of SAIL interfaces with a specific business entity context. They expose detailed views, actions, tasks and reports in the context of an individual record.	Pages and process dashboards with quick task channels and process launcher channels with context.
Reports Tab	Lists the reports the user has access to. These are macro-level reports showing data and aggregation from many sources. This is different from micro-level reports displayed on an individual Record view.	In portal, applications would expose one or more navigation tabs to represent various reports.
Report Views	SAIL pages that display charts, tables and any SAIL interface component. Data can be sourced from the database, process, or external systems.	Report channels on portal pages. Reports were based on in-memory process data.
Actions Tab	A list of processes the user may start to perform new work.	In portal, process launcher channels spread across many applications and application pages.
SAIL Forms	Appian SAIL (Self-Assembling Interface Layer) enables "write once, deploy anywhere" user interfaces across all modern web browsers and the major native mobile platforms	Forms built with the legacy Forms Designer or implemented as Java Server Pages. Dynamic capability required custom JavaScript and dynamic forms did not work on mobile.

News Feed

The news feed is the platform landing page that provides a central location for surfacing important business events for the purpose of improving productivity through collaboration. In addition, it provides a foundation for fostering organic user-initiated business discussions.

Events posted by processes should be *relevant*, *useful* and *actionable*. Concentrate on events that will provide value to highlight and encourage further collaboration and discussion on events. Avoid using the feed as a history or actions; this will only make it harder for users to identify the important events.

Events should be targeted to their intended audience to facilitate collaboration between the key business users and improve cross-department collaboration.

Users can personalize their feed by following other users and managing their feed subscriptions. News is dynamically searchable and comes with various

different [views](#) (Updates, Participating, and Starred). The most important considerations for the News Feed are security and creating diverse, meaningful content. Developers should create groups that can be targeted in messages or added as participants to posts. They should also make sure that system events and comments are not posted too frequently from process and are properly secured.

In portal, collaboration was sometimes accomplished via Task [notes & attachments](#). In Tempo, we recommend using the news feed for this functionality. Create links from tasks to news feed posts where workers can collaborate and share attachments.

Tempo is available to all users regardless of the default environment. By default, all users can see each other and collaborate openly. However, you can use the [User Profile Visibility](#) settings to restrict which users can interact with other users to ensure that your business security requirements are being met.

Pages

Portal pages are limited to a specific application and tailored to that applications requirements. Tempo provides a consolidated and consistent view across data and actions the user has access to.

The following table lists the functionality as presented in portal and how it is presented in Tempo. This section focuses on portal pages which do not provide any context other than the application it belongs to. See [Process Dashboard to Record View](#) for when individual context is available.

Page Purpose	Tempo Approach
Task list for an application.	Use a Task Report in the Tasks tab.
Report with drilldown to Process Dashboard	Identify the core business entity that best reflects how users work with the processes (e.g., users see a list of `Purchase Approvals`, but really they're working on a `Purchase Request` entity). This will become a Record that will expose functionality from multiple applications into a streamline view that can change dynamically with the processes to present the most relevant information.
Report that aggregates data	Use a Tempo Report in the Reports tab.
Process Launcher	Use an Action in the Actions tab.

See [Portal Channels to Tempo](#) for a full list of channels and how they can be mapped to Tempo.

Process Dashboard to Record View

In portal, a process dashboard provides a single monolithic view of the process status. In Tempo, a record can have multiple views that are targeted to their audience and dynamically change with the process. The data displayed can flow with the process to only show what's relevant to the user, discarding irrelevant data that only clutters the screen and makes it less efficient to take action.

Using entity-backed records instead of process-backed records avoids the need for long running processes or refreshing variables in the parent process to display changes. Instead, data is pulled directly from the database and the record reflects changes as soon as they are saved. See the [Creating Memory Efficient Models](#) page for more information on this.

A full list of portal channels and how they can be mapped to Tempo is available in the [Portal Channels to Tempo](#) section.

Quick Tasks to Related Actions

Quick tasks are exposed on a process dashboard of a long running process to provide ad-hoc actions for the end-user. The design pattern usually involves starting a new process, completing the steps and archiving the process, but leaving the parent process running.

Related actions do not require a long-living process to expose ad-hoc actions. These are similar to process launcher channels with context. The record data is available for mapping into the process model to allow it to determine the context it needs to execute.

As mentioned in [Process Dashboard to Record View](#) using entity-backed records avoids the need for long running processes, simplifying application development.

If the quick task already starts a sub-process, then it can already be exposed as a related action on an entity-backed or service-backed record when the start form and subsequent process task forms have been [converted to Tempo](#).

If the quick task steps are part of the main parent process, they'll need to be extracted into their own process model and exposed as a related action once the start form and subsequent process task forms have been [converted to Tempo](#).

Portal Reports to Tempo Reports

Unlike portal reports, Tempo reports are not restricted to reporting on process data. This allows data which is normally stored in process for reporting to be offloaded to a relational database, decreasing the resource utilization of the environment and simplifying application maintenance.

SAIL supports a range of graphical and non-graphical options for displaying data. SAIL is agnostic to the data source (e.g process, database or web service) which allows it to be very flexible in how the data can be displayed and interacted with.

To create a Tempo report, the following steps are taken:

1. Retrieve the data
2. Process and format the data
3. Display using [SAIL Components](#)

The [Task Report Tutorial](#) shows an example of how data is retrieved from an existing portal report and displayed in Tempo using SAIL Components.

Portal Task Forms to Tempo Task Forms

Task forms in portal were static unless they relied on custom JavaScript. Forms that used JavaScript were not mobile-enabled and often experienced browser-incompatibility problems. On the other hand, Tempo Tasks utilize the power of SAIL to create a rich, dynamic interface for users that's support cross-platform without the need to write and maintain complex JavaScript.

Tempo Tasks are created by building SAIL forms using the same interface building blocks used in Records and Tempo Reports. This makes it very easy to create interfaces that can be re-used in multiple places to speed up development and minimize the effort of maintenance.

Some simple examples of reuse:

- A common header that's present on all tasks which requires duplicating the section and mappings in portal, but only require a reference to the interface in SAIL.
- Instead of duplicating task forms to provide a read-only version of data, in Tempo you can create a single SAIL form which supports dynamically toggling the read-only attribute.

To convert a form to SAIL use the following tables to identify which [SAIL components](#) to use for the equivalent portal form field. While these tables provide equivalents there is much more functionality available in SAIL to enhance forms.

Standard Fields

Portal Form Field	SAIL Interface Component
Text	Text Field
Number	Integer Field or Floating Point Field
Paragraph	Paragraph Field
Radio	Radio Button Field
Checkbox	Checkbox Field
Dropdown	Dropdown Field
True/False	Radio Button Field , Dropdown Field or Checkbox Field
Date & Time	Date Field , Time Field or Date Time Field
File Upload	Field Upload Field
Button	Button Layout
Password	Encrypted Text Field
Hidden	local variable
Link	Link Components

Layouts

Portal Form Field	SAIL Interface Component
Tab	Use SAIL to dynamically show and hide sections.
Section	Section Layout
Grid	Grid Layout
Paging Grid	Grid Field
Message	Rich Text Display Field
Image	Image Components
Report	Chart Components or Grid Components

Special Fields

Portal Form Field	SAIL Interface Component
Knowledge Center Picker	Folder Picker

Documents & Folders Picker	Document and Folder Picker
Community Picker	Folder Picker
People Picker	User Picker , Group Picker or User and Group Picker
Portal Page Picker	Portal pages are not used in Tempo.
Discussion Picker	Discussions are not used in Tempo.
Email Address	Text Field with validation
Email Recipient	User Picker

Portal Channels to Tempo

Portal Channel	Tempo Approach
Directory	Grid Component
Discussion Forum	News Feed
Knowledge Center Browser	Document Browser Field
Links	Link Component
My Subscribed Topics	News Feed , Feed Subscriptions
My Tasks	Tasks Tab or Task Report
Process Launcher	Action or Related Action
Process Model Browser	Process models should only be browsed in the Designer interface
Quick Task	Related Action
Report	Tempo Report , Task Report or Record List View
Sponsored Discussion Topics	News Feed
Update Constant	Action using Update Constant Smart Service
Upload Document	Action or Related Action
Web Content	Rich Text Display Field Component
Web Content with Dynamic Data	Rich Text Display Field Component
Web Page	Link Component

User Guides by Role

Designer
Developer
Web Admin
Server Admin (On-Premise Only)

Tutorials

Records
Interfaces
Process

Release Information

Release Notes

Installation
Migration
System Requirements
Hotfixes
Release History

Other

STAR Methodology
Best Practices
Glossary
APIs