Appian Quick Reference Guide

Appian Application Platform
The Appian application platform allows you to do work easily on any supported device. You can collaborate on the News feed, complete tasks, view records and reports, and start processes.

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.

Use advanced search options to narrow results
- `from:username` returns entries from a particular user
- "exact phrase" returns entries with the exact phrase
- `is:starred` returns entries that you have starred
- `feed:name` limits search results to a particular feed

Advanced search options can be used alone or in combination

Filter the News feed by view
- All shows all entries sorted by most recently added
- Updates shows all entries sorted by the most recent activity
- Participating shows entries that you’re involved with
- Kudos shows all kudos entries
- Starred shows entries you’ve starred
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.

Records
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.
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.

Orders by Customer

Customers Dashboard

Top 5 Industries by Customer Count

<table>
<thead>
<tr>
<th>Industry</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>8</td>
</tr>
<tr>
<td>Transportation</td>
<td>7</td>
</tr>
<tr>
<td>Food Services</td>
<td>5</td>
</tr>
<tr>
<td>Real Estate</td>
<td>4</td>
</tr>
<tr>
<td>Services</td>
<td>3</td>
</tr>
</tbody>
</table>

Customers Served by Peter Harris

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone of Contact</th>
<th>E-mail</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duran Collects</td>
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<td>Retail</td>
<td></td>
</tr>
<tr>
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<td>Transportation</td>
<td></td>
</tr>
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<td>Transportation</td>
<td></td>
</tr>
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<td>Teraquark International</td>
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<td>Retail</td>
<td></td>
</tr>
</tbody>
</table>

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.

User Profile

Customize your user profile by adding a picture, a cover photo, and a short blurb.

User Settings

Use the settings page to set your regional preferences and update feed subscriptions. You may also be able to reset your password or update third-party credentials if those features are enabled at your organization.