Appian Quick Reference Guide

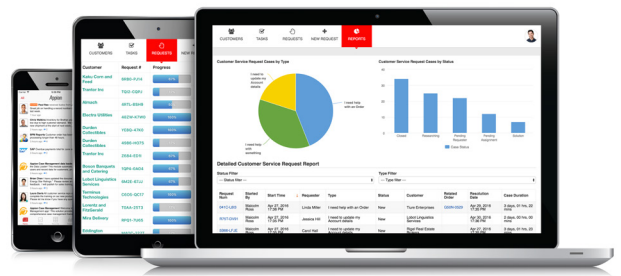News   Tasks   Records   Reports   Actions   User Profile

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:**_name_ 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

News   Tasks (5)   Records   Reports   Actions

Search news

All >
Updates
Participating
Kudos
Starred

Laura Davis All customer service reps are required to complete the training on our new product offerings. Please let me know if you have any questions.

Jan 23, 2017   Comment

Show 4 comments

Brian Chen Is there a deadline for when we must complete the training?
Jan 23, 2017

Laura Davis Yes. All training must be completed by the end of the month.
Jan 23, 2017

Add your comment here...

Linda Jones has opened a new Critical Priority Customer Service Request for Rebo and Sons. Request type: I need help with an Order

Rebo and Sons   Customer Service Requ...   ED01-9ET1

Jan 18, 2017   Comment   More Info ▾

Click a record tag to quickly access the record

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.
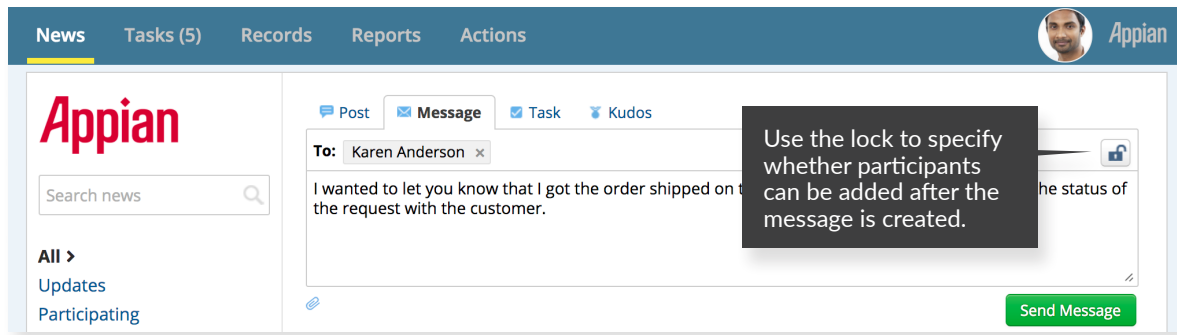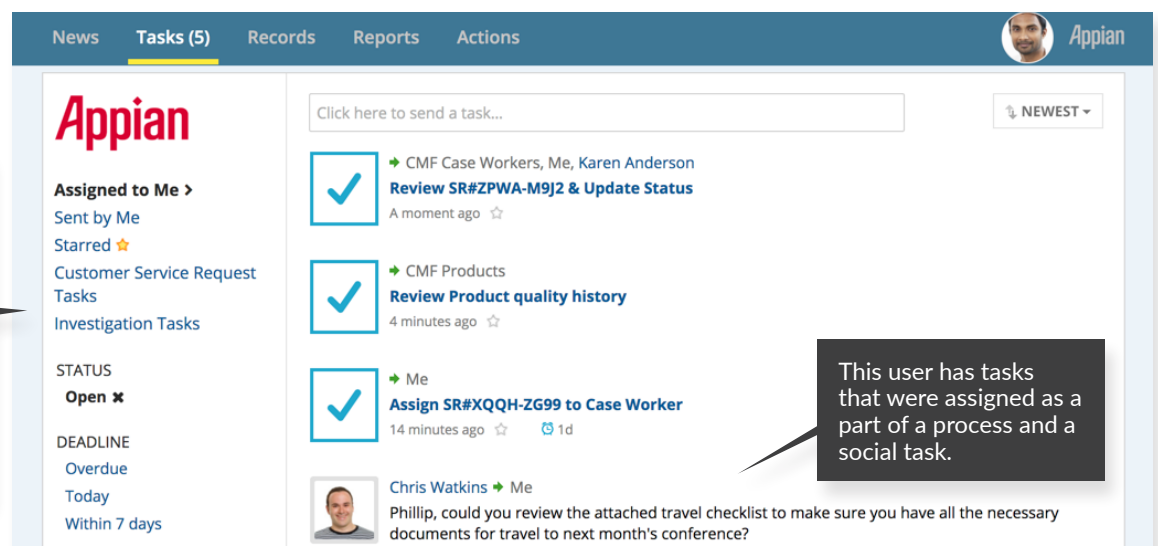

Following Users and Records

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.

When a task is assigned to you and other users, you must accept the task before starting work.

Some tasks give you the option to reject or reassign the task.

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*.

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*,

The Summary view of this record has related actions called *Update Customer*, *New Order*, and *New Request*.

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.
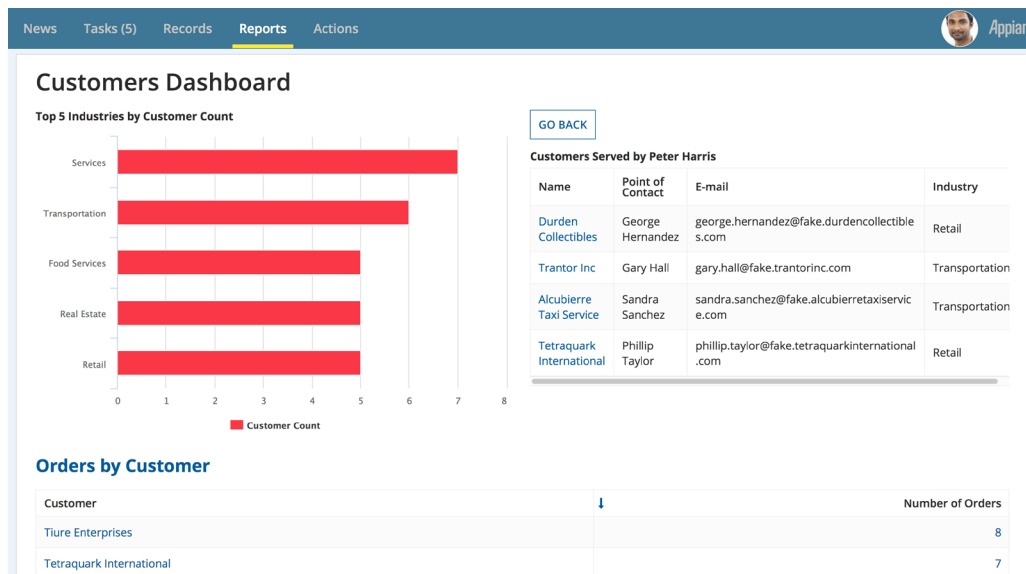
Actions

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.