

Records Part 1, Accessing Your Data

Crear un Record Type

Se crea un Record Type en la sección New->Record Type, posteriormente se agrega la seguridad del registro, colocando a Registrars y Supervisors como observadores y a Administrator como administrador.

Create Record Type

Name*

The name that designers see in Appian Designer


Plural Name*

The name that users see in the list of record types


Description










A description that end users see in the list of record types

Review Record Type Security

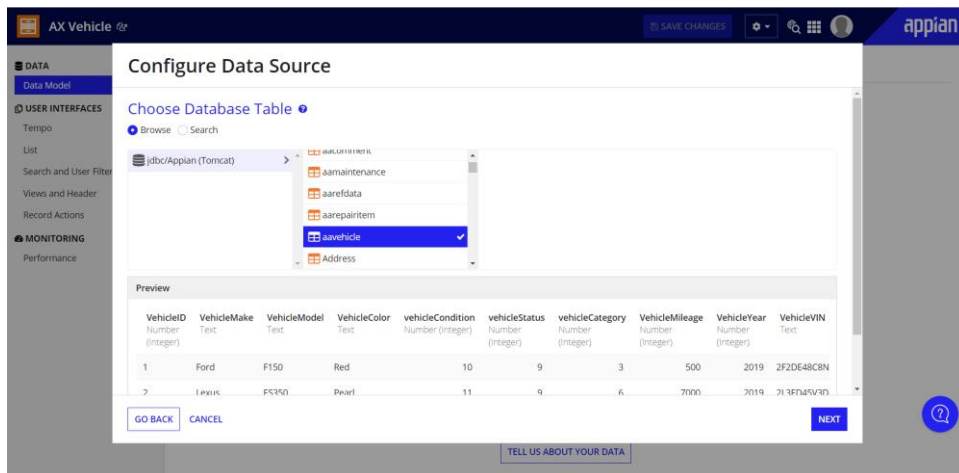
 **Tip:** Basic users must have at least viewer rights to the record type in order to access it in Tempo or on a site. Additionally, for Tempo, the record type must be configured to show in the Records tab. [Learn more](#)

Name

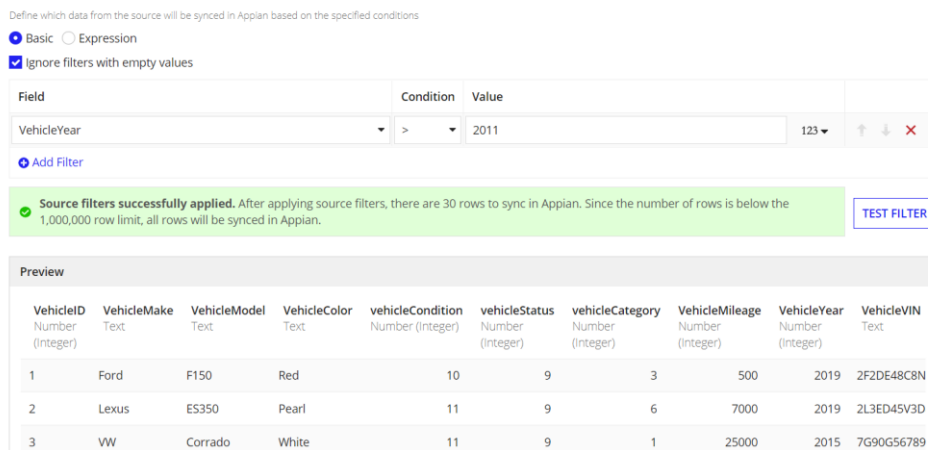
 AX Vehicle

User or Group	Permission Level	
Default (All Other Users)	No Access	
 AX Registrars 	Viewer	
 AX Supervisors 	Viewer	
 AX Administrators 	Administrator	
+ Add Users or Groups		

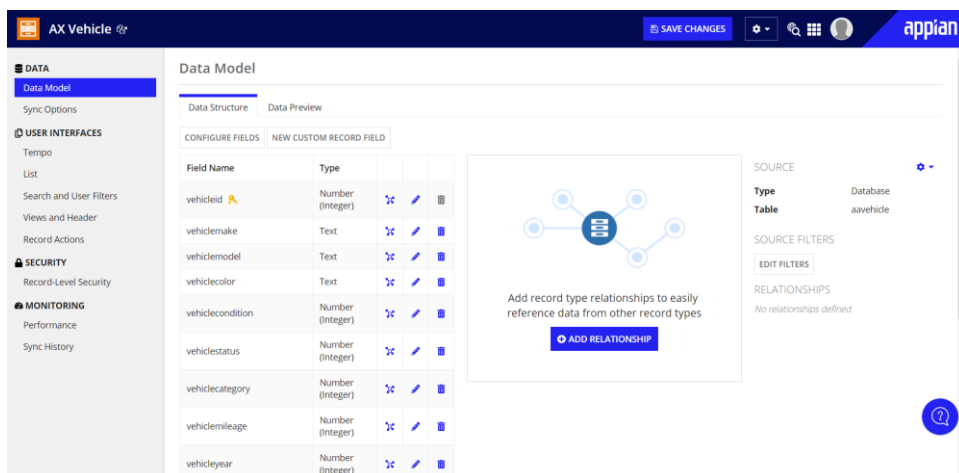
Se selecciona el origen de los datos



Para esto se agregará un filtro, en el que solo se observará la información de años superiores al 2011



Ya terminado, se podrá observar la información de la tabla y además se podrá visualizar los datos en forma de una grilla.



Vehicleid	Vehiclemake	Vehiclemodel	Vehiclecolor	Vehiclecondition	Vehiclestatus	Vehiclecategory	Vehiclemileage	Vehicleyear	Vehiclevin	Vehiclelastmaintenanc
1	Ford	F150	Red	10	9	3	500	2019	2F2DE48C8N4309374	6/8
2	Lexus	ES350	Pearl	11	9	6	7000	2019	2L3ED45V3D4030403	5/16
3	VW	Corrado	White	11	9	1	25000	2015	7G90G567894589047	5/22
4	Honda	Pilot	Pearl	10	9	2	1000	2020	7Y569K09856785656	6/4
5	Honda	Odyssey	Silver	10	9	2	25	2020	2H7XF64H8J6572134	3/2
6	Toyota	Camry	Metallic Red	12	7	1	2000	2018	1T4PV29A0F8557854	6/1
8	Ford	F150	Red	10	9	3	700	2019	1F4C3758P3628311	5/9
9	MB	GLS	Gray	11	9	6	10000	2018	3FG896754U7456456	4/12
19	Toyota	Highlander	Blue	11	9	2	1500	2019	3F4F587F84D73847	5/14
20	Ford	Focus	Blue	13	9	1	70000	2015	34FG6789567435678	5/14
21	Toyota	Highlander	White	12	9	2	7000	2020	1F34GH4V83D345698	5/14
23	VW	Corrado	Egg Shell	11	9	1	30000	2015	7G90G567894589048	3/2
24	Ford	F150	White	10	9	3	700	2019	5F3484833D5534544	4/7

Creación de un Custom Record Field

Para ello, en el mismo Record Type creado, se puede escoger la opción de crear un Custom Record Field.

Create Custom Record Field

Select a Template Configure Values Set Name and Type

SELECT A TEMPLATE

Reporting

- Groups Based on a Range**
Define ranges to organize your numerical data.
Example: If you have a record field called "price", you could create a new custom field called "priceGroup" so when the price value is less than or equal to \$10, the custom field displays the value as "Low", price values greater than \$10 and less than or equal to \$30 display as "Medium", and all other price values display as "High".
- Groups Based on Text Values**
Organize text values into groups.
Example: If you have a record field called "status" with 10 unique statuses, you could group them into multiple new statuses. So the status values "in review" and "in testing" could be grouped together to display as "Pending" in the new custom record field.
- Groups Based on a Date Difference**
Calculate the difference between two date or date and time fields and organize the

Data Preparation

- Extract Partial Dates**
Return a partial value from a date, like the date without the time, or just the month from the date.
Example: Using the record field "closedOn", you could create a new "closedOnMonth" custom record field that only displays the month in which a ticket was closed.
- Aggregate Related Record Fields**
Get the sum, average, count, distinct count, maximum, or minimum of a related record field in a one-to-many relationship.
The Support Case record type has a one-to-many relationship with the Comments record type, and you want to know how many comments were left on each case. On the Support Case record type, you can create a custom record field that calculates the count of comments for each support case.
- Date Difference**
Return the difference between two dates

CANCEL NEXT

Después se configuran los valores, en este caso se configura el kilometraje seleccionando diferentes rangos, para poco, medio y largo kilometraje

Create Custom Record Field

Select a Template **Configure Values** Set Name and Type

CONFIGURE VALUES

GROUPS BASED ON A RANGE

Create Groups From **vehiclemileage** Number of Groups: 3

Custom Field Value

Low Mileage: Includes values ≤ 50000

Medium Mileage: Includes values > 50000 and ≤ 150000

High Mileage: Includes any remaining values

TEST

View Record Data Enter Test Values TEST

vehicleid: Number (integer) Custom Record Field

Click TEST to preview values

BACK CANCEL NEXT

Crear Record List

Para ello en la parte izquierda se selecciona la opción de lista y se mostrará una pantalla para mostrar la información, nosotros solo seleccionamos la información que queremos:

Edit Record List

RESET LIST TEST

Grid

Columns

- Vehiclemake (Grid Column) ⚙
- Vehiclemodel (Grid Column) ⚙
- Vehicleyear (Grid Column) ⚙
- Vehiclevin (Grid Column) ⚙
- Vehicleextmaintenancedate (Grid Column) ⚙
- Vehicleimage (Grid Column) ⚙
- Vehicleaddedby (Grid Column) ⚙

Initial Sorts List of SortInfo

Secondary Sorts List of SortInfo

Grid

LAYOUT

Columns

- Vehiclemake (Grid Column) ▶
- Vehiclemodel (Grid Column) ▶
- Vehicleyear (Grid Column) ▶
- Vehiclevin (Grid Column) ▶
- Vehicleextmaintenancedate (Grid Column) ▶
- Vehicleimage (Grid Column) ▶

ADD COLUMN

Empty Grid Message

PAGING & SORTING

Rows to Display Per Page

50

Vehiclemake	Vehiclemodel	Vehicleyear	Vehiclevin	Vehicleextmaintenancedate	Vehicleimage
Ford	F150	2019	2F2DE48C8N4309374	8/10/2020	354
Lexus	ES350	2019	2L3ED45V3D4030403	8/24/2020	357
VW	Corrado	2015	7G90G567894589047	11/22/2020	356
Honda	Pilot	2020	7Y569K09856785656	11/18/2020	354
Honda	Odyssey	2020	2H7XF64H8J6572134	9/2/2020	357
Toyota	Camry	2018	1T4FV29A0F8557854	12/1/2020	356
Ford	F150	2019	1F4CG3758P3628311	5/10/2021	355
MB	GLS	2018	3FG896754U7456456	7/20/2020	354
Toyota	Highlander	2019	3F4F587F84DJ73847	11/14/2020	357
Ford	Focus	2015	34FG678956T435678	11/14/2020	355
Toyota	Highlander	2020	1F34GH4V83D345698	11/30/2020	355
VW	Corrado	2015	7G90G567894589048	9/28/2020	354

Se agregará la columna del registro personalizado creado

Edit Record List

RESET LIST TEST

Grid

Columns

- Vehiclevin (Grid Column) ⚙
- Vehiclemake (Grid Column) ⚙
- Vehiclemodel (Grid Column) ⚙
- Vehicleyear (Grid Column) ⚙
- Vehicleextmaintenancedate (Grid Column) ⚙
- Vehicleimage (Grid Column) ⚙
- Vehicleaddedby (Grid Column) ⚙
- MileageCategory (Grid Column) ⚙

Initial Sorts List of SortInfo

Secondary Sorts List of SortInfo

Grid

Grid Column

Label

Mileage Category

Sort Field

mileageCategory X

Help Tooltip

Display Value

mileageCategory X

DISPLAY OPTIONS

Visibility

Always show

Only show when...

Alignment

Vehiclevin	Vehiclemake	Vehiclemodel	Vehicleyear	Vehicleextmaintenancedate	Vehicleimage
2F2DE48C8N4309374	Ford	F150	2019	8/10/2020	354
2L3ED45V3D4030403	Lexus	ES350	2019	8/24/2020	357
7G90G567894589047	VW	Corrado	2015	11/22/2020	356
7Y569K09856785656	Honda	Pilot	2020	11/18/2020	354
2H7XF64H8J6572134	Honda	Odyssey	2020	9/2/2020	357
1T4FV29A0F8557854	Toyota	Camry	2018	12/1/2020	356
1F4CG3758P3628311	Ford	F150	2019	5/10/2021	355
3FG896754U7456456	MB	GLS	2018	7/20/2020	354

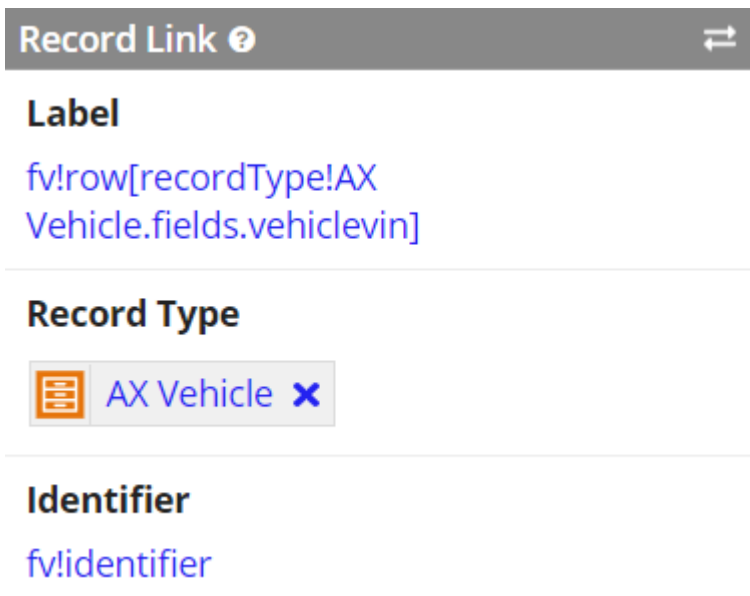
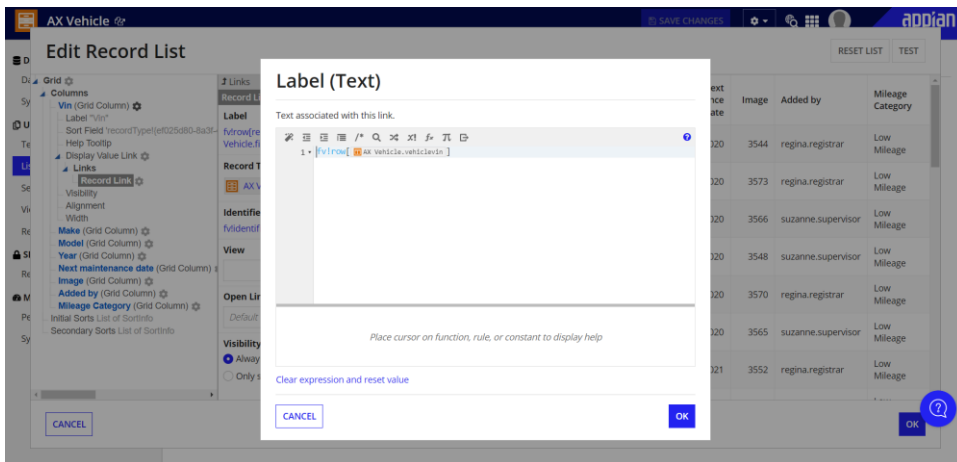
Grid ⚙

Columns

- Vin (Grid Column)** ⚙
- Make (Grid Column)** ⚙
- Model (Grid Column)** ⚙
- Year (Grid Column)** ⚙
- Next maintenance date (Grid Column)** ⚙
- Image (Grid Column)** ⚙
- Added by (Grid Column)** ⚙
- Mileage Category (Grid Column)** ⚙
- Initial Sorts List of SortInfo
- Secondary Sorts List of SortInfo

Editar las columnas

Se agregará un formato de link en la columna VIN



También se eliminará el formato de link de la columna Make

Vin	Make
2F2DE48C8N4309374	Ford
2L3ED45V3D4030403	Lexus
7G90G567894589047	VW
7Y569K09856785656	Honda
2H7XF64H8J6572134	Honda
1T4FV29A0F8557854	Toyota
1F4CG37S8P3628311	Ford

Grid Column

Label
Make

Sort Field
vehiclemake

Help Tooltip

Display Value
vehiclemake





Visibility
 Always show

Alignment

Darle formato correspondiente a Added By

The screenshot shows the 'Edit Record List' window for 'AX Vehicle'. A dialog box titled 'Display Value (Any Type)' is open, allowing the user to define a rule for the 'Added by' column. The rule text is: `ruleAX_DisplayUser (fvrow[ax.vehicle.vehicledesby:]).` The background table has columns: Image, Added by, and Mileage Category. The 'Added by' column contains names like 'regina.registrar' and 'suzanne.supervisor'. The 'Mileage Category' column contains 'Low Mileage'.

Y por último darle un formato de imagen a la columna Imagen

Image	Vin	Make	Model	Year	Next maintenance date	Image
<p>Document Image</p> <p>Document</p> <p><code>fVrow[recordType!AX Vehicle.fields.vehicleimage]</code></p> <p>Alternative Text</p> <p>Caption</p> <p><code>fVrow[recordType!AX Vehicle.fields.vehicleimage]</code></p> <p>Link</p> <p>+ SELECT LINK</p> <p>Visibility</p> <p><input checked="" type="radio"/> Always show</p> <p><input type="radio"/> Only show when...</p>	2F2DE48C8N4309374	Ford	F150	2019	8/10/2020	
	2L3ED45V3D4030403	Lexus	ES350	2019	8/24/2020	
	7G90G567894589047	VW	Corrado	2015	11/22/2020	
	7Y569K09856785656	Honda	Pilot	2020	11/18/2020	

Agregar Filtro de usuario

Create New User Filter

Guided Configuration Expression

Filter Configurations

Name

Label

Enter an expression to define the displayed name of this user filter. Example: "Status"

Field

Type List Date Range

Visibility Always Only show when...

List Configurations

Users can select multiple options

Option Label	Operator	Value			
<input checked="" type="checkbox"/> 1 "Low Mileage"	=	1 "Low Mileage"	↑	↓	×
<input checked="" type="checkbox"/> 1 "Medium Mileage"	=	1 "Medium Mileage"	↑	↓	×
<input checked="" type="checkbox"/> 1 "High Mileage"	=	1 "High Mileage"	↑	↓	×

1 - 3 of 3

Default Option(s)

When this value matches a filter option label, that filter option is applied at runtime.

Generar pantalla de resumen


Generate New View

Review the objects you need for your new view

To generate your view, Appian will use...

- 1 NEW OBJECT
- 1 EXISTING OBJECT

New objects will be generated for you when you click GENERATE VIEW

Click  to rename a generated object or replace with an existing object

Interface

The interface used for your record view

Security and Organization

The users who have permission to view these objects

AX_VehicleSummary | DESIGN MODE | EXPRESSION MODE

TEST | SAVE CHANGES

appian

PALETTE | COMPONENTS | INTERACT

Search Components...

LAYOUTS

- SECTION
- COLUMNS
- SIDE BY SIDE
- BOX
- CARD
- BILLBOARD

INPUTS

- PLAIN TEXT
- PARAGRAPH
- INTEGER
- DECIMAL
- DATE
- DATE & TIME
- ENCRYPTED TEXT
- FILE UPLOAD
- SIGNATURE
- BARCODE

SELECTION

- DROPDOWN
- MULTIPLE DROPDOWN
- RADIO BUTTON

Vehicle

Vehiclemake	Ford	Vehiclemodel	F150
Vehiclecolor	Red	Vehiclecondition	10
Vehiclestatus	9	Vehiclecategory	3
Vehiclemileage	500	Vehicleyear	2019
Vehiclevin	2F2DE48C8N4309374	Vehiclelastmaintenancedate	June 8, 2020
Vehicleextmaintenancedate	August 10, 2020	Vehicleimage	3544
Vehicleaddedby	regina.registrar	Vehicledateadded	May 4, 2019
Vehiclelastmodifiedby	community.admin	Vehiclelastmodifiedate	October 7, 2021
Mileage Category	Low Mileage		

RULE INPUTS

Name	Value
record	[AX Vehicle vehid...

LOCAL VARIABLES

COMPONENT CONFIGURATION

List of Any Type

Vehicle (Section Layout)

ADD COMPONENT

AX_VehicleSummary | DESIGN MODE | EXPRESSION MODE

TEST | SAVE CHANGES

appian

PALETTE | COMPONENTS | INTERACT

Search Components...

LAYOUTS

- SECTION
- COLUMNS
- SIDE BY SIDE
- BOX
- CARD
- BILLBOARD

INPUTS

- PLAIN TEXT
- PARAGRAPH
- INTEGER
- DECIMAL
- DATE
- DATE & TIME
- ENCRYPTED TEXT
- FILE UPLOAD
- SIGNATURE
- BARCODE

SELECTION

- DROPDOWN
- MULTIPLE DROPDOWN
- RADIO BUTTON

Billboard Layout

Drop component here

Vehicle

Vehiclemake	Ford	Vehiclemodel	F150
Vehiclecolor	Red	Vehiclecondition	10
Vehiclestatus	9	Vehiclecategory	3
Vehiclemileage	500	Vehicleyear	2019
Vehiclevin	2F2DE48C8N4309374	Vehiclelastmaintenancedate	June 8, 2020
Vehicleextmaintenancedate	August 10, 2020	Vehicleimage	3544
Vehicleaddedby	regina.registrar	Vehicledateadded	May 4, 2019

RULE INPUTS

Name	Value
vehicle	[AX Vehicle vehid...

LOCAL VARIABLES

COMPONENT CONFIGURATION

List of Any Type

Billboard Layout

Billboard Configurations

Background Media

Document Image

Background Color

#f0f0f0

Height

Default

Visibility

Always show

Only show when...

Margin Above

Default

Margin Below

AX_VehicleSummary | DESIGN MODE | EXPRESSION MODE

TEST | SAVE CHANGES

appian

PALETTE | COMPONENTS | INTERACT

Search Components...

LAYOUTS

- SECTION
- COLUMNS
- SIDE BY SIDE
- BOX
- CARD
- BILLBOARD

INPUTS


- PLAIN TEXT
- PARAGRAPH
- INTEGER
- DECIMAL
- DATE
- DATE & TIME
- ENCRYPTED TEXT
- FILE UPLOAD
- SIGNATURE
- BARCODE

SELECTION

- DROPDOWN
- MULTIPLE DROPDOWN
- RADIO BUTTON

Vehicle Information

Vehicle

Make	Color	Status	Mileage	Vin	Next Maintenance Date	Model	Condition	Category	Year	Date Added	Image
Ford	Red	9	500	2F2DE48C8N4309374	August 10, 2020	F150	10	3	2019	May 4, 2019	

RULE INPUTS

Name	Value
vehicle	[AX Vehicle vehid...

LOCAL VARIABLES

COMPONENT CONFIGURATION

Contents

Columns Layout

Columns

List of Any Type

Vertical Alignment

Default

Visibility

Always show

Only show when...

not

Margin Above

Default

Margin Below

Default

Column Spacing

Customizar la vista el resumen

Configurations

Record Title

Guided Configuration Expression

The screenshot shows the Expression Builder interface with a toolbar at the top containing icons for undo, redo, search, and other functions. The main area contains three lines of configuration code:

```

1 rv!record[ AX Vehicle.vehicleyear ] & " " &
2 rv!record[ AX Vehicle.vehiclemake ] & " " &
3 rv!record[ AX Vehicle.vehiclemodel ]
    
```

The screenshot shows the Appian record detail page for a 2019 Ford F150. The page includes a navigation bar with 'Records', 'Tasks (3)', 'Reports', and 'Actions'. The record title is '2019 Ford F150'. Below the title is a 'Summary' tab and a large image of a red Ford F150. The 'Vehicle Information' section displays the following details:

Vehicle			
Make	Ford	Model	F150
Color	Red	Condition	10
Status	9	Category	3
Mileage	500	Year	2019
Vin	2F2DE48C8N4309374	Date Added	May 4, 2019

Crear Record Action

Generate New Action

The screenshot shows the 'Generate New Action' configuration screen. It includes a sidebar with instructions, a main configuration area, and a table of generated actions.

Review the objects you need for your new action
To generate your action, Appian will use...

- 4 NEW OBJECTS
- 6 EXISTING OBJECTS

New objects will be generated for you when you click GENERATE ACTION

Click to rename a generated object or replace with an existing object

Workflow
How the record data flows and how the user completes the action
Learn more [Learn more](#)

- AX_CreateVehicle
- AX_New_Vehicle1
- AX_CreateVehicleDisplayName1

Data
Where the data for your record action is stored
Learn more [Learn more](#)

- AX_Vehicle
- Namespace: urm:com:appliantypes:AX
- AX Data Store
- Datastore Entity: AX_Vehicle
- AX_VEHICLE_DSE

Security and Organization

BACK CANCEL GENERATE ACTION

Display Name	Key	Process Model	Visibility
<input checked="" type="checkbox"/> Add Vehicle	newVehicle	AX New Vehicle	1 =true()