

# Process Explorer



## Opening Existing Processes

Locate the process you wish to open. Right click on the process or its icon and select Open. If you are working on a Development Server, you can select Open Copy to create a working copy of what will be a production process.

## Creating New Process

To create a new process, first locate the folder that you wish to store the process into. Right click on that folder and select Create Process. Enter the name of the process in the dialog and select OK. A blank process design window will be opened for you to start your process design.

## Creating a Folder

To create a folder, right click on the top most folder labeled “Processes”. Select New Folder from the menu. Enter the name of the new folder and click OK.

## Deleting a Folder

Right click on the folder you wish to delete. Select Delete from the menu. Only empty folders can be deleted. If a folder you wish to delete contains processes, you must either delete those processes or move them to other folders.

## Renaming Processes and Folders

To rename a folder or a process, right click on the folder or process you wish

to rename. Select Rename from the menu. Enter a new name and click on OK. The new name appears instantly in the Process Explorer window.

## **Moving Processes**

Processes may be moved from one folder to another. To move a process, first select the process with the mouse. Using the left mouse button, hold down the button and drag the process to its new folder. Release the mouse button.

## **Deleting Processes**

To delete a process, first locate the process you wish to delete. Right click on the process and select Delete. If the process is in development (red icon), you may need to revert the process before you are able to delete it.

## **Reverting a Process**

Reverting a process discards any changes made to the process on the development server. If the process does not exist on a production server, the process will be removed completely.

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