

Data Element Properties

To show the property dialog for a data element, either right click on the data element and select Properties, or double-click on the data element. A dialog showing the data element's properties will be displayed.

Name

Displays the name of the data element used in process design. The name cannot contain spaces. The underscore character (“_”) can be used in place of spaces. The name is automatically derived from the name used when creating a data element, but can be changed at a later time.

Display Name

The display name is the name used when presenting the data to a user in the Web Interface. The Display Name can contain various characters including spaces.

Default Value

Most data element types allow specification of a default value. This value is used when a process instance is created. For commonly used information, specifying a default value can save data entry time.

Default Attachment

For document data types, a default file can be specified. You may wish to attach a blank purchase order form, or a new employee review form for those

types of processes.

Multi-User Flag

Setting this flag designates that the data element is going to be used in a Group Data.

A Multi-User data element will store a value for each user that updates it. Multi-user data is generally used for items in which more than one person will be contributing data. Some examples include time sheet reporting and status reports.

Data Type

If you wish to change to data type, select a new data type from this drop-down control.

Format

Dates and numbers can be formatted in various ways. See formatting options.

Length

You can specify the maximum length of a String data type by changing the value of this field. By default, strings are set to be 50 characters in length. Strings can go up to 255 characters.

Maximum/Minimum

For numeric data types, a maximum and/or minimum value can be specified. These values will be checked prior to allowing a task to be submitted through the Web Interface.

Display Type

String data types can be displayed in various ways in the web interface. For all but the Text Field option, a list of values should be specified.

Text Field

Text Fields are shown as a single line text box in which character data can be entered.

Drop Down

A drop down list box will be populated with the values supplied in the Choices list. The user will then be able to select one element from the list.

Radio Button

A group of choices will be available on the Task Detail page based on the values entered in the Choices list.

Check Boxes

Zero, one or more choices are available on the Task Detail page based on the values entered in the Choices list.

Choices

Specify the list of values to be used in the Drop Down, Radio Button, or Check Boxes option for display in the Task Detail page of the Web Interface.

Using a Database Table

If you have a data source defined for your account, you can use information from a database table to populate a dropdown list, check boxes, or radio

buttons.

First, select the Database tab in the Data Element properties dialog. Select the “Use Datasource” checkbox if you would like to populate from a database.

Second, select the datasource that contains the data you wish to access.

Third, create a SQL query that will return the data set you wish to use to populate the control. Data will be displayed in the order in which it is returned from the query. The query may return multiple columns. The first column returned will be used for the value of the selected element(s). If more than one column is returned, the remaining columns will be used for the display values.

The value column can be different from the displayed data. This will allow you to store an abbreviated version of your data, while displaying a verbose version to your end users.

If you are using a datasource, the information returned from the query will override any information you may have entered in the “Choices” tab.

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