

Process Properties

To bring up the Process Properties dialog, right-click on any blank or empty area in the process design window and select Properties. Optionally, you can select Properties from the File menu. The Process Property dialog will then appear (see below).

Process Description

Provides a brief description of the nature of the process.

Instance Description

Shows a template for generating a name to designate a specific process instance from other instances. This name can be generated by any number of the current process data elements.

The instance description is used when searching process instances, and in some generated email to show completion status.

Summary

This field is used in certain situations when many processes are related back to one parent process. It works similar to the Instance Description field, but is displayed in different circumstances.

Process Data Expiration

This field determines how long the process instance data and audit trail will remain on the server. By default, this field is set at one year. The expiration date is calculated from the time the process instance completes. Once the expiration date passes, all information related to the process instance will be removed from the server.

Security

When process status is viewed from the Web Interface, some or all of the process elements can be limited by specifying security on each element.

View Active Task List

Designates which group of users can view currently active tasks and delays. A small amount of detail will be included with the status display including current assignment and due dates.

View Process Data

Designates a group that will be allowed to view all available process data. Users in this group will have view access to every data element in the process including document attachments.

View Graphical Display

Designates the group that can view a graphical representation, or visual flowchart, of the process status. This will include a graphic similar to what is displayed in the process design window.

View Process Log

Designates which group has access to view the process log detail.

Note: The process log may display data associated with the process.

Change Process Data

Determines the security level needed to modify individual pieces of data from the process instance status screen.

Edit Workflow

Designates a security group that is allowed to edit this workflow design.

Management View

Determines a security group to view tasks as a management role. Users in this group can view tasks assigned to individuals and groups, even though they themselves may not be members of the task security group. This allows users to be designated as managers who can view the statuses of tasks in the workflow.

Owner

Shows the current owner, or designer of this process.

Online URL: <https://support.quikbox.com/article.php?id=201>