

Processes Home List View

The Processes Home List allows you to quickly monitor or analyze ongoing progress of processes you have at least viewer permissions to.

Hovering over a status will show you how many actions are in that status. Select this icon to filter by any status, canceled, complete, or In progress processes.

By default, your processes are sorted by the most recently started; however, you can choose to sort the columns by Name, Due Date or Completion Date. When looking for a specific process, you can use the keyword search here to quickly find it by name.

Selecting the dropdown to the right of a Process allows you to perform actions. You can go directly to the process, send reminders based on the status of the actions in the Process, Update permissions, or View the activity log (the same activity log seen in the process monitor view).

Finally, the Create Process button next to the search bar allows you to define a new Process right from within your Dashboard. Once a process is started by selecting "Run", it will appear in the Home List.