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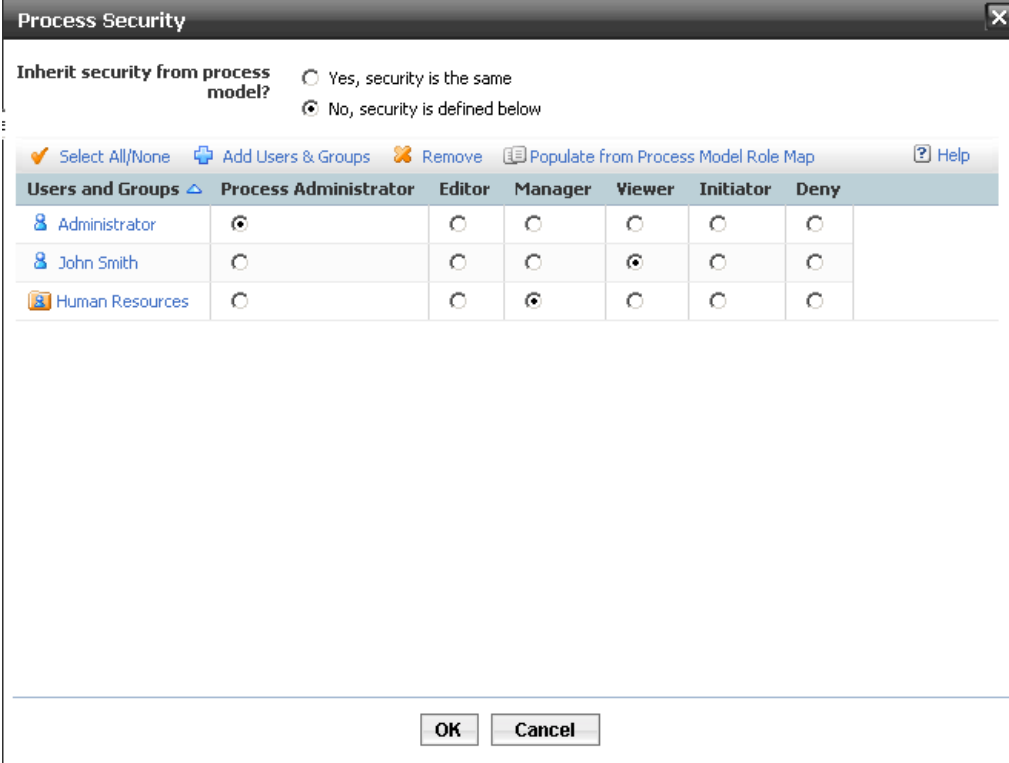
Configuring Process Security

Appian 7.6

In addition to configuring the security settings associated with a process model, Appian allows users with sufficient rights to configure the security associated with a process. By default, all processes inherit security from their underlying process model. This behavior can be overridden.

Toggle Us

You can access the security settings for an active process from the Process Details and Process Dashboard pages for the process.

Changing the security of a process does not automatically update the security of a process dashboard.

Updating Security Settings for a Running Process

- Click 🔒 Security on the Process Details or Process Dashboard toolbar. The Process Security dialog box is displayed.

Process Security

Inherit security from process model?
○ Yes, security is the same
◉ No, security is defined below

✔ Select All/None   ➕ Add Users & Groups   ✖ Remove   📖 Populate from Process Model Role Map   ❓ Help

Users and Groups △	Process Administrator	Editor	Manager	Viewer	Initiator	Deny
👤 Administrator	◉	○	○	○	○	○
👤 John Smith	○	○	○	◉	○	○
👥 Human Resources	○	○	◉	○	○	○

OK   Cancel

The different roles that can be assigned to actors in a process are described in the following table.

Actions	Process Administrator	Editor	Manager	Viewer	Initiat
Upload attachments to a task that is assigned to the user	X	X	X	X	X
Reassign tasks assigned to me, when reassignment is enabled	X	X	X	X	X
Add attachments/notes to a process	X	X	X	X	
View process status	X	X	X	X	
View process report	X	X	X	X	
View node report	X	X	X	X	
View task reports	X	X	X	X	
Update process variables	X	X	X		
Remove attachments/notes from a process	X		X		
Reassign tasks for other users when reassignment is enabled	X	X	X		
Reassign tasks when reassignment is disabled	X	X			

View and complete tasks assigned to other users in the system (as well as tasks assigned to you)	X	X			
Change process security roles for other users and groups	X				
Perform in-flight modifications to the process	X				
Stop or pause a process	X				
Delete a process	X				

Deny Role

- If a user or group is assigned the Deny role they cannot perform any action associated with the selected process.
- The right to view assigned tasks cannot be removed.

Only Process Administrators of a process model and System Administrators have the necessary security rights to provide other users and groups access to a running process.

Process Security Toolbar

The Process Security Toolbar permits administrators to add or remove users and groups who have access to a running process. The different options available through the toolbar are listed in the table below:

To...	Click...	Description
Select all/none of the users on the list.	✔ Select All/None	Clicking this button toggles between selecting (Select All) or clearing (Select None) of the listed users and groups.
Browse for users and groups.	Add Users & Groups	Click this button to display the Choose Groups and Users dialog box from which you can select multiple users and groups for role assignment.
Remove users and groups.	Remove	Select all users and groups that you wish to remove and click **Remove**. To select multiple users and groups, press and hold the (**Ctrl**) key and click multiple rows.
Revert back to the security settings defined in the underlying process model.	Populate from Process Model Role Map	Select this button to revert back to the security settings defined in the underlying process model.

See also: Configuring Process Model Security