



PNMsoft Knowledge Base
Sequence User Guides
Read Only Forms

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General Document Information

Purpose

The purpose of this document is to enable Sequence Developers to create a Read Only Form.

Prerequisites

- Basic knowledge of developing processes with Sequence.

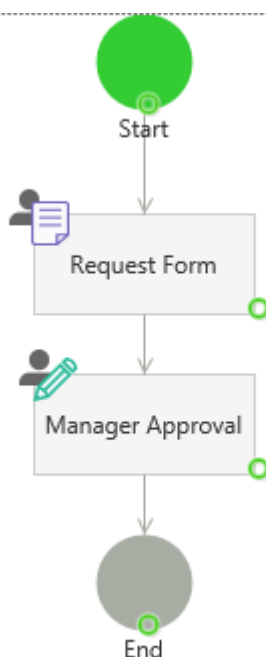
Overview

Sequence enables you to quickly create different views of a form with the same data model. One option is to create a Read Only view of the form, which you can then embed in subsequent forms in the process (e.g. within a Task).

Using this method, you can expose data that was entered in an early phase of the process to other users to help them take a better decision or perform their work better.

Creating a Read Only Form for a Task

In the following example, we will create a Read Only view of a form, which we will then insert as a sub view into a Task. This is a useful and common scenario, as it enables the Task owner (e.g. a manager) to review what was filled out in the original form without being able to edit it.



Approval Workflow

To create a Read Only Form for insertion into a Task:

1. Add a Form to the workflow and add one table in the Data Model.
2. Set the key to be workflow instance ID (fldiwfid).

Table Data Source-- Web page Dialogue

Table Properties

☒ Current Workflow
☐ External Table
☐ New

Request Form - RequestForm

Selected Table: UACTa648d9fa828f4d9c8ff7438acb57ec0c

Name: RequestForm

Key Name: fidiwfid

Secondary Key Name:

Connection String:

Next Cancel

Set Key to fidiwfid

3. In the Data Fields screen, add fields for the Form.

Table Data Source-- Web page Dialogue

Data Fields

| Name | Type |
|---------|---------------|
| Item | Text (String) |
| Qty | Text (String) |
| Comment | Text (String) |

[Add New Field](#)

Properties

General

(Name) RequestForm

Display Name RequestForm

[Switch to Advanced Mode](#)

Back Finish Cancel

Data Fields

4. Select a Form Template and click **Finish**. The Form is created.

UX Studio - Request Form - Internet Explorer

Request Form - DefaultView

Design Views Data Development

Save Refresh Screen Options Validate Process Lab

Toolbox

- Data
 - Form
 - Grid
 - Data Source
 - Form Part
- Responsive Layout
 - One Column Section
 - Two Column Section
 - Three Column Section
- Layout
 - One Column Table
 - Two Column Table
 - Three Column Table
- Editors
 - Text
 - Label
 - Text Box
 - Numeric Text Box
 - Masked Text Box
 - Date Input
 - Button
 - Submit Button
 - Date Picker
 - Time Picker
 - Date and Time Picker
 - Month and Year Picker
 - Combo Box
 - File Upload
 - Async File Upload

REQUEST FORM

Form description...

REQUESTFORM

Item

Qty

Comment

DataSource - RequestFormDataSource

Save Submit

Properties

View

(Name) DefaultView

Alias DefaultView

Compatibility Version 8

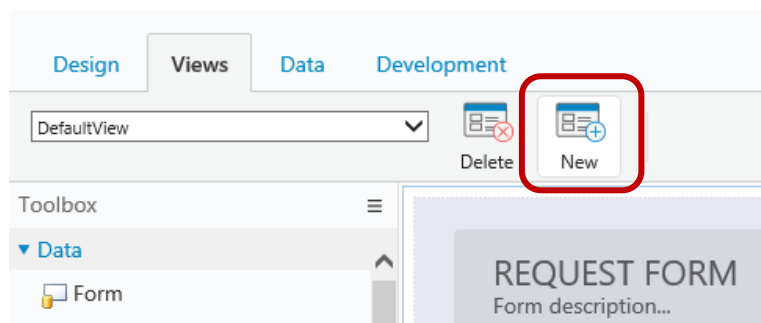
Id 232763ac-9806-48d6-8788-42000a564a29

IsActive ☒

Toolbox UI Generation Design Split Source

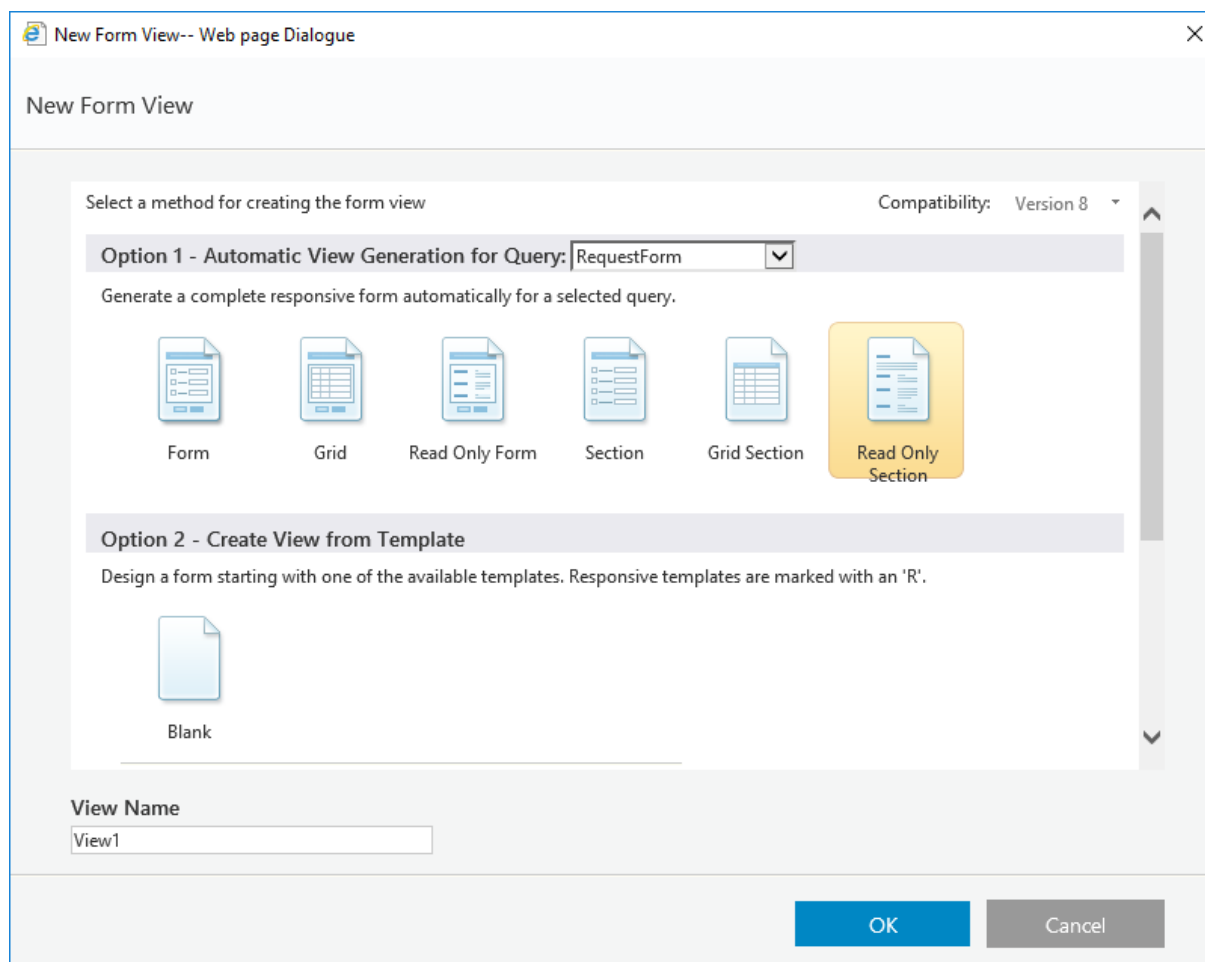
Request Form

- From the Views tab, select **New**:



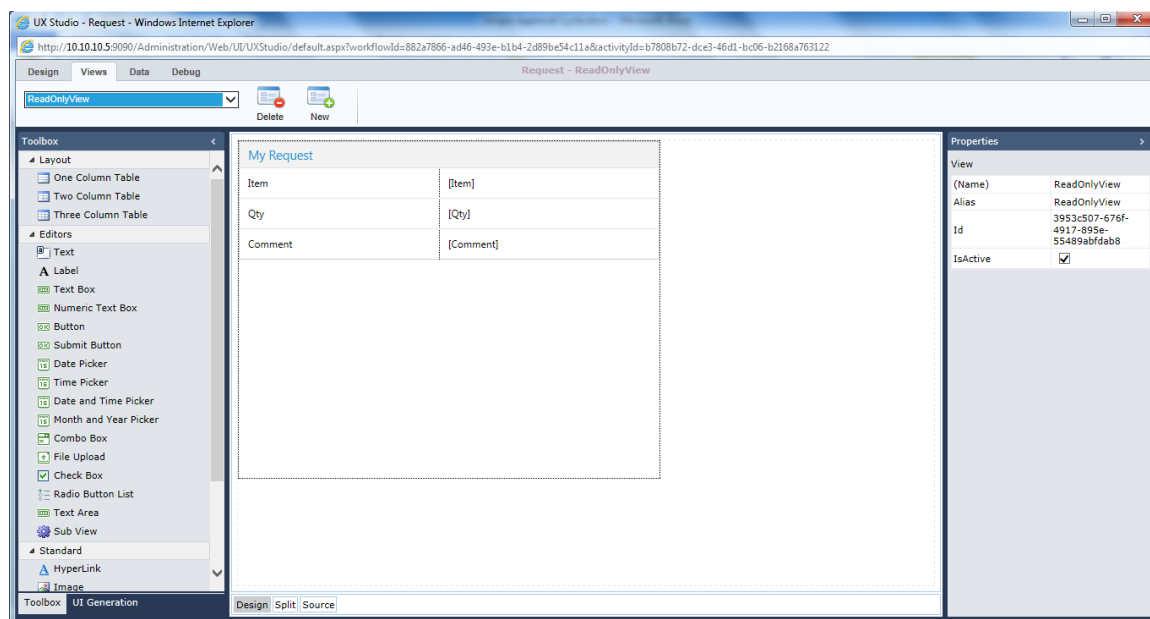
Select Views > New

- In the *New Form View* screen, verify that the selected query is the one you have just created, click **Read Only Form**, enter "ReadOnlyView" in the **View Name**, and click **OK**.



Select Read Only View

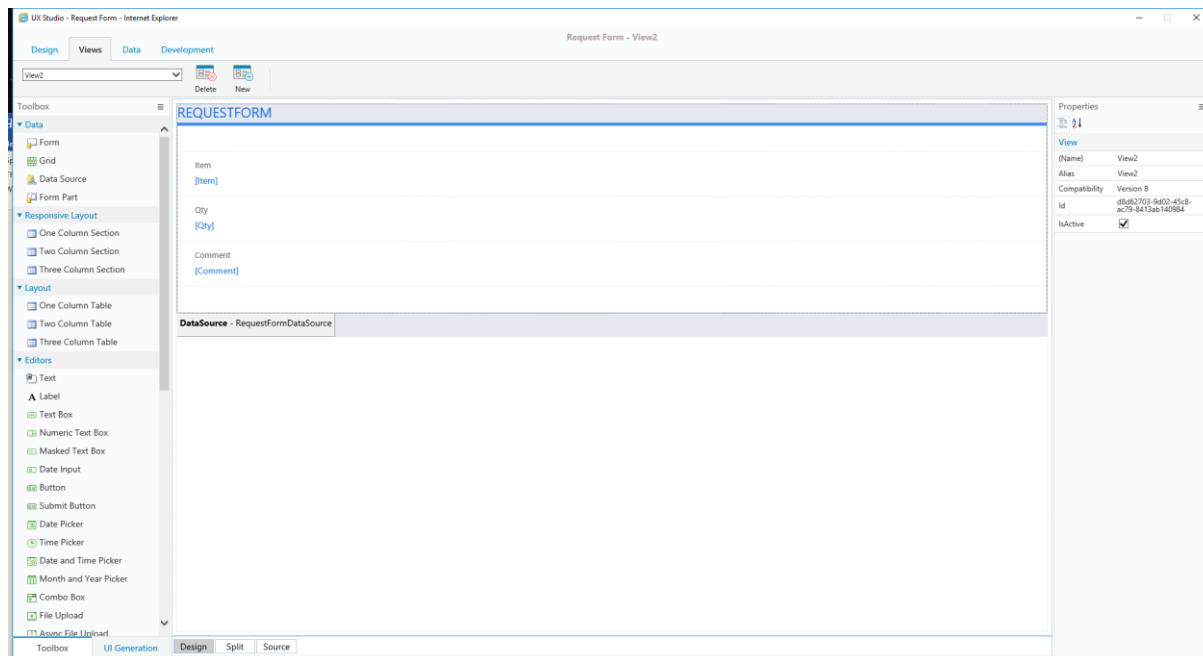
The Read Only Form view is created:



Read Only View Created

7. Add a Manager Approval Task to the workflow and add the following fields to its Form:

- **Approval:** a combo box or checkbox. For a combo box, use Edit Choices to add the values: Approve, Decline.
- **Comments:** a text area.



Manager Approval Task

8. Connect these fields to data sources.

Table Data Source-- Web page Dialogue

Data Fields

| Name | Type |
|-------------|-------------------------|
| ApprovalCmb | Text (String) |
| Comments | Multiline Text (String) |

Properties

General

(Name) ManagerApproval

Display Name ManagerApproval

[Add New Field](#)

[Switch to Advanced Mode](#)

Back Finish Cancel

Data Fields of the Task

- In the Data Model, leave the key as activity instance ID (fldlActId).

Table Data Source-- Web page Dialogue

Table Properties

☒ Current Workflow
☐ External Table
☐ New

Manager Approval - ManagerApproval
Request Form - RequestForm

Selected Table UACTdfe09a5e3d2746c5a133e1667396bcf8

Name ManagerApproval

Key Name fldlActId

Secondary Key Name

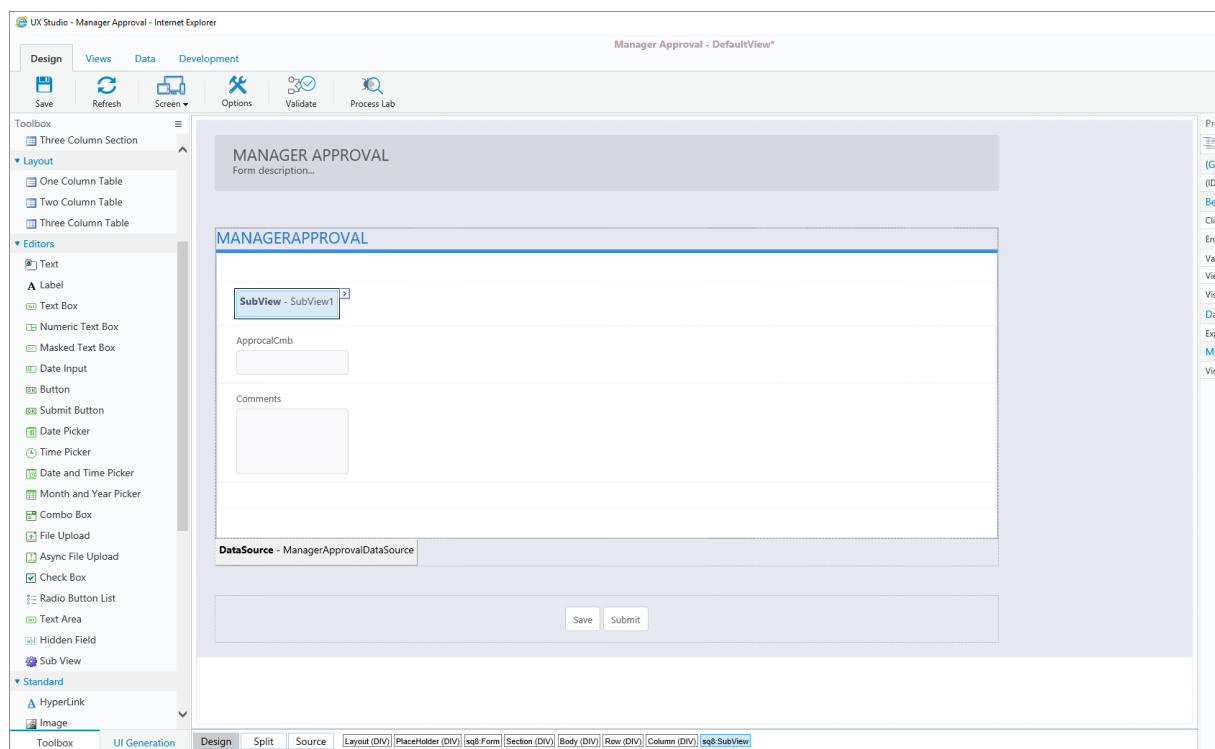
Connection String

Next Cancel

Table Properties

- Select a Template and click **Finish**. The Approval Form is created.

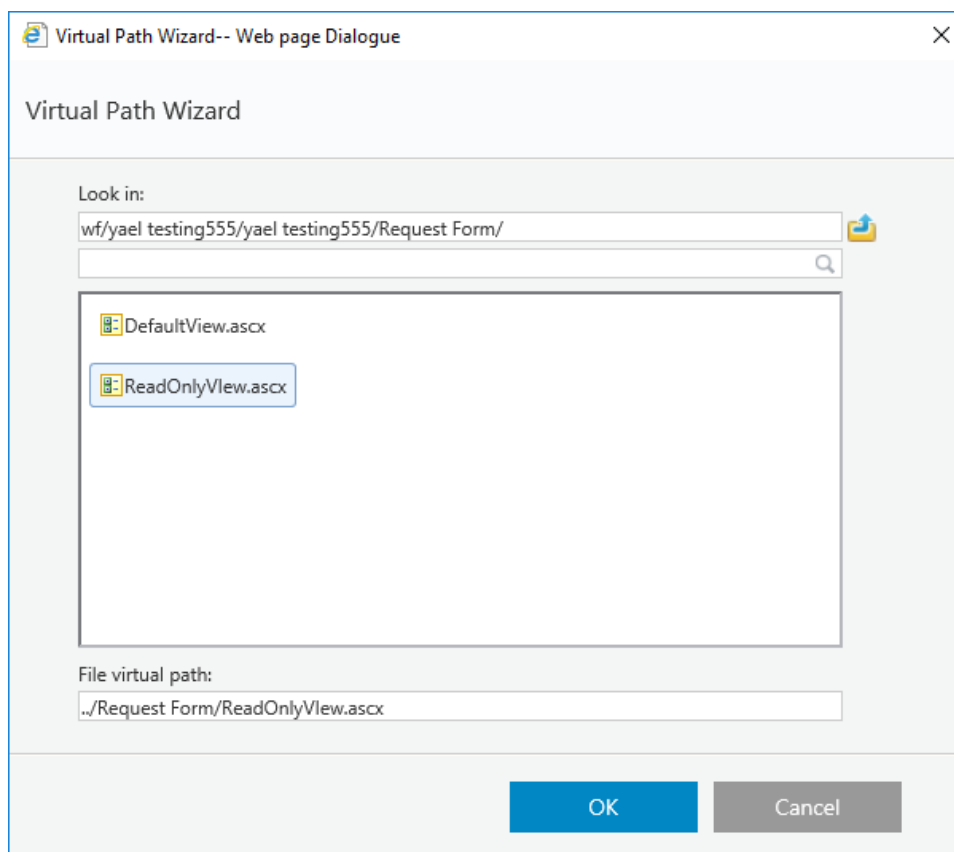
11. Add a Sub View control to the Approval Form:



Add Sub View

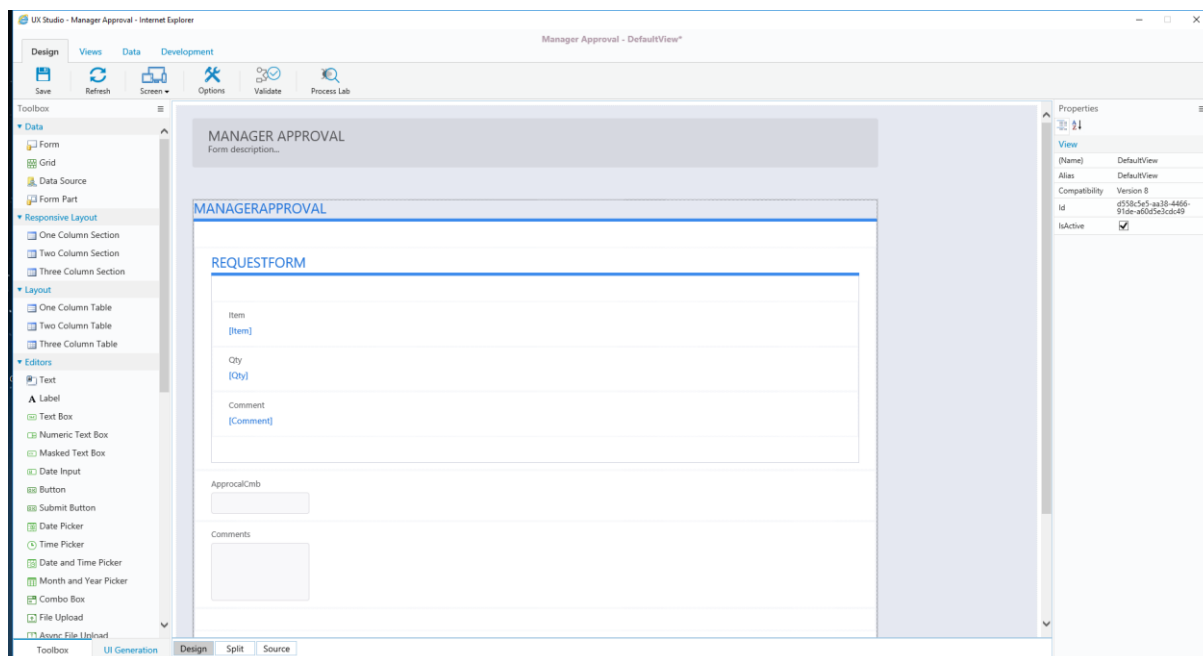
12. From the Sub View Properties (right side), click  beside Virtual Path.

13. Click  and set the Sub View to the Read Only view from the Request Form activity:



Set Sub View

14. Click **OK**. The original Form has now been added to the Task as a Read-Only form.



Sub View Added

When the Task is reached, the manager will be able to review the original Form fields, but not edit them. He can then approve or decline the Task based on his assessment.