PNMsoft Knowledge Base

Sequence User Guides

Read Only Forms

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Product Version 7.0 and above

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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.

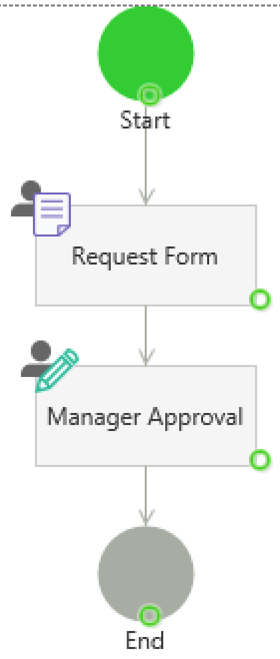
Overview

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

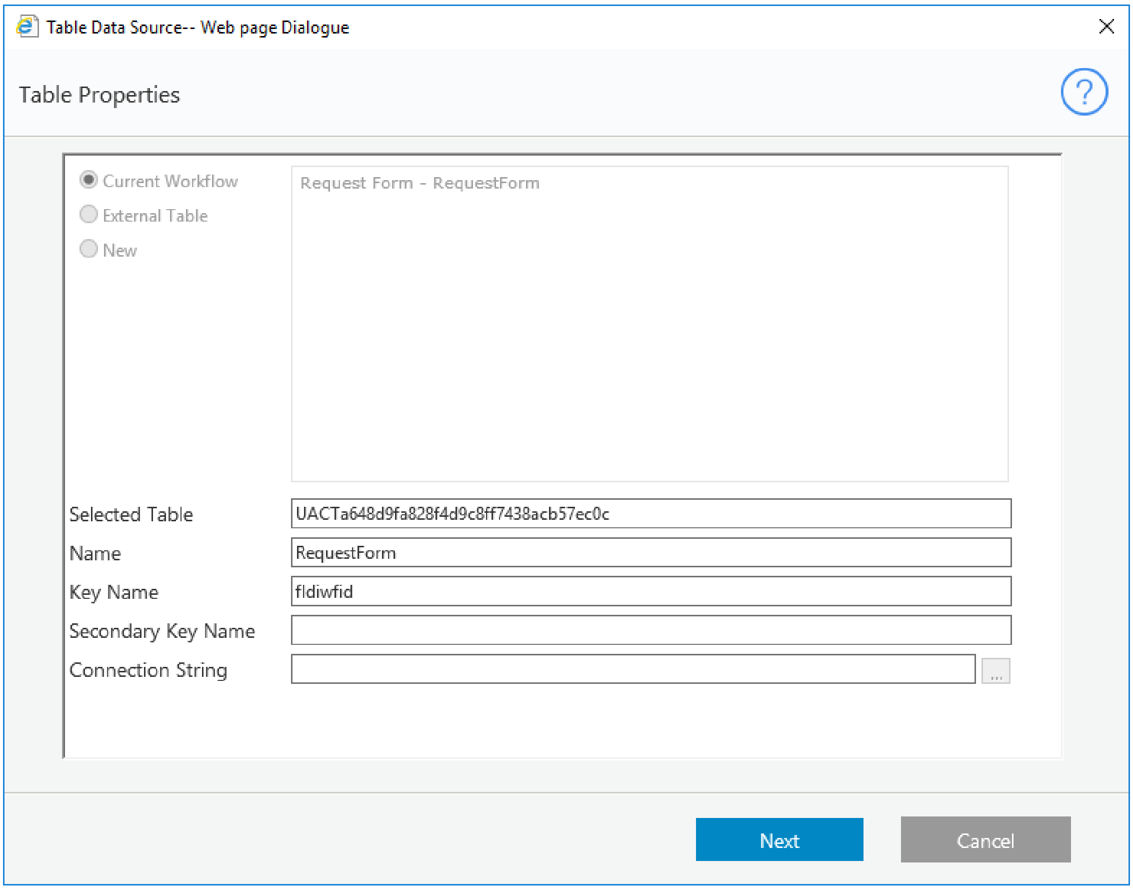
In the following example, we will create a Read Only view of a form, which we will then insert as a sub view into a Task. This is a useful and common scenario, as it enables the Task owner (e.g. a manager) to review what was filled out in the original form without being able to edit it.



Approval Workflow

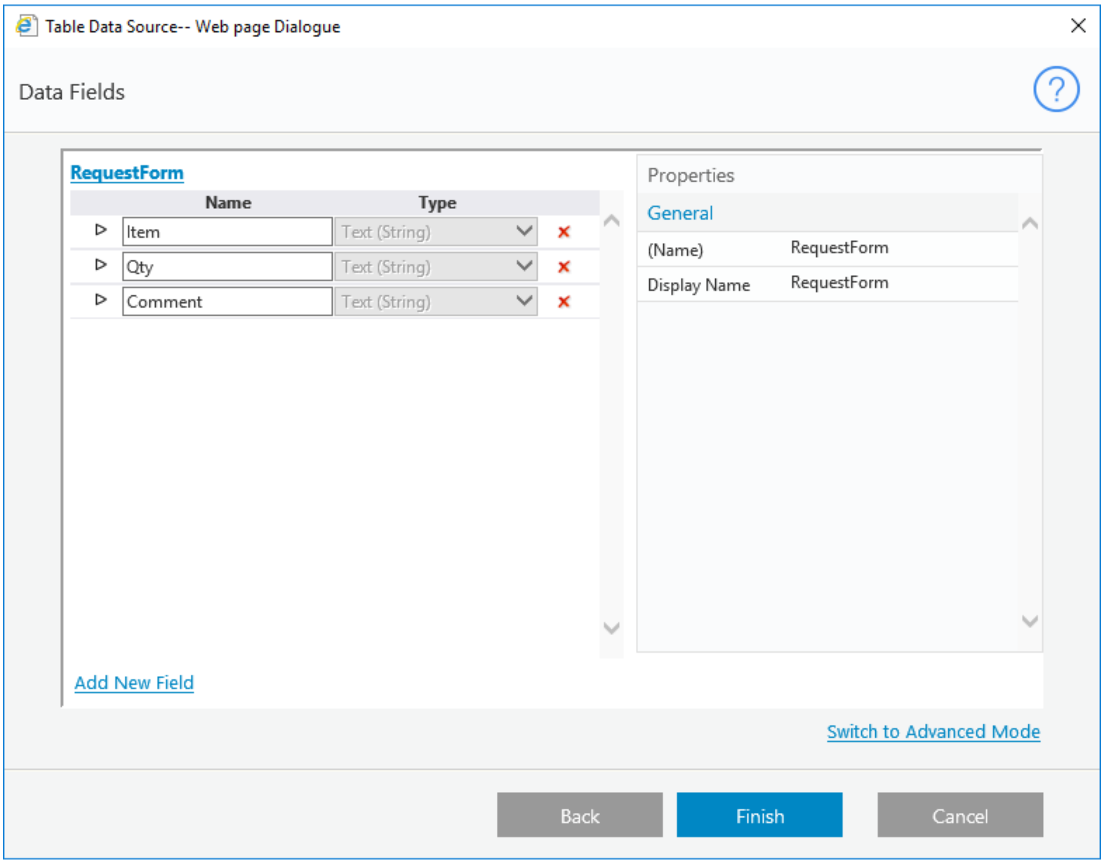
To create a Read Only Form for insertion into a Task:

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).



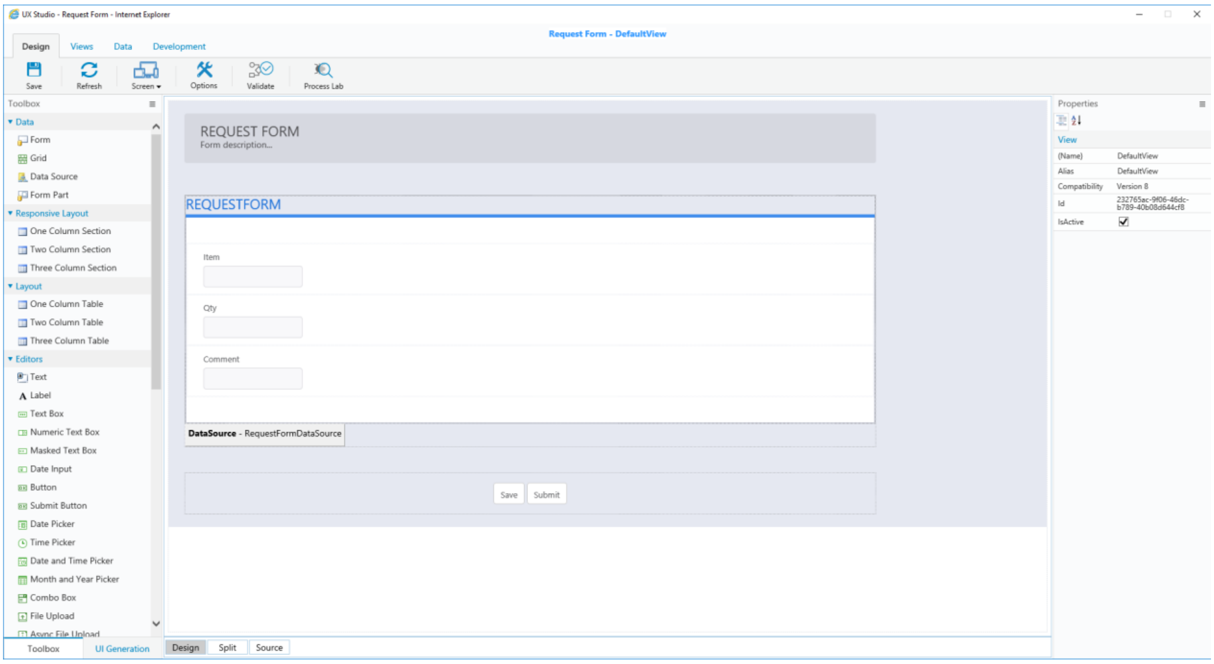
Set Key to fldwfid

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



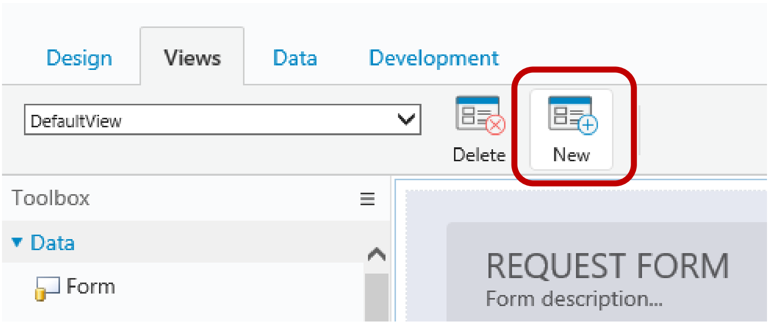
Data Fields

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



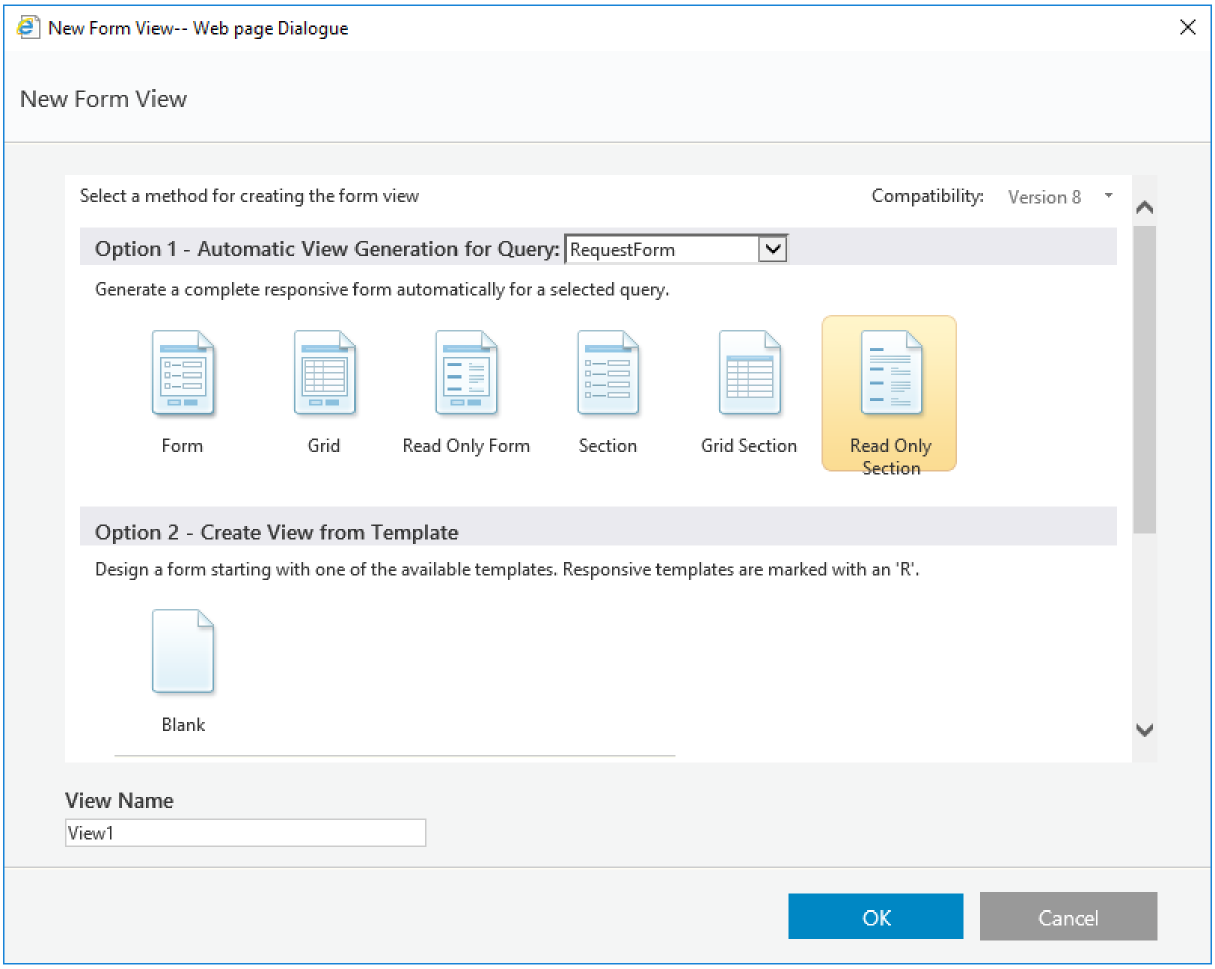
Request Form

5. From the Views tab, select **New**:



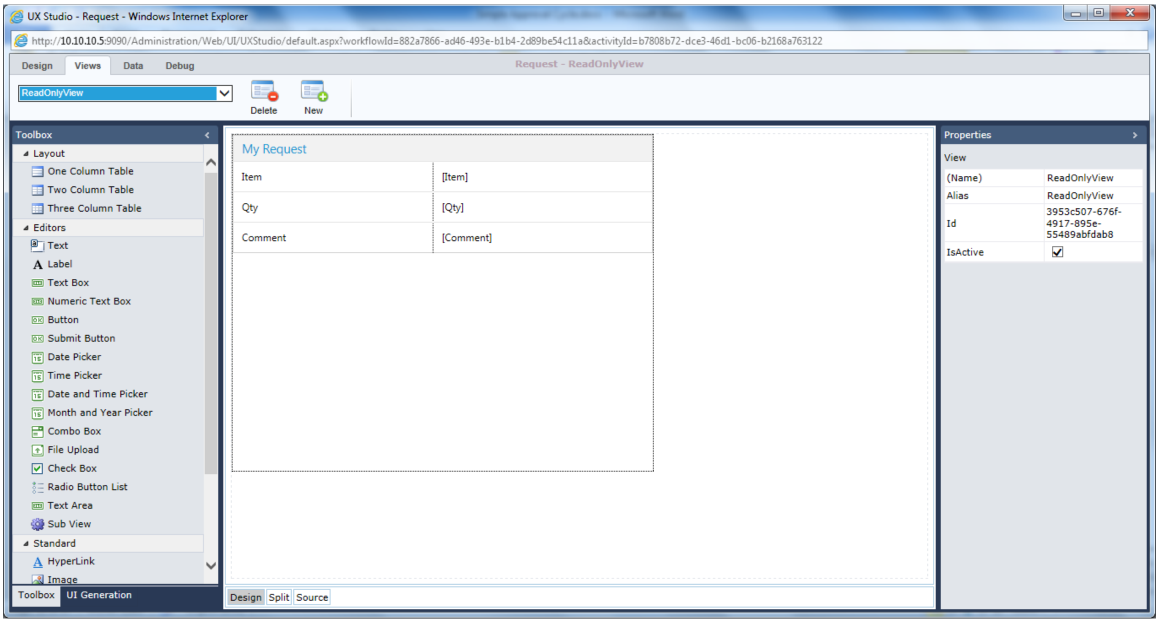
Select Views > New

6. 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

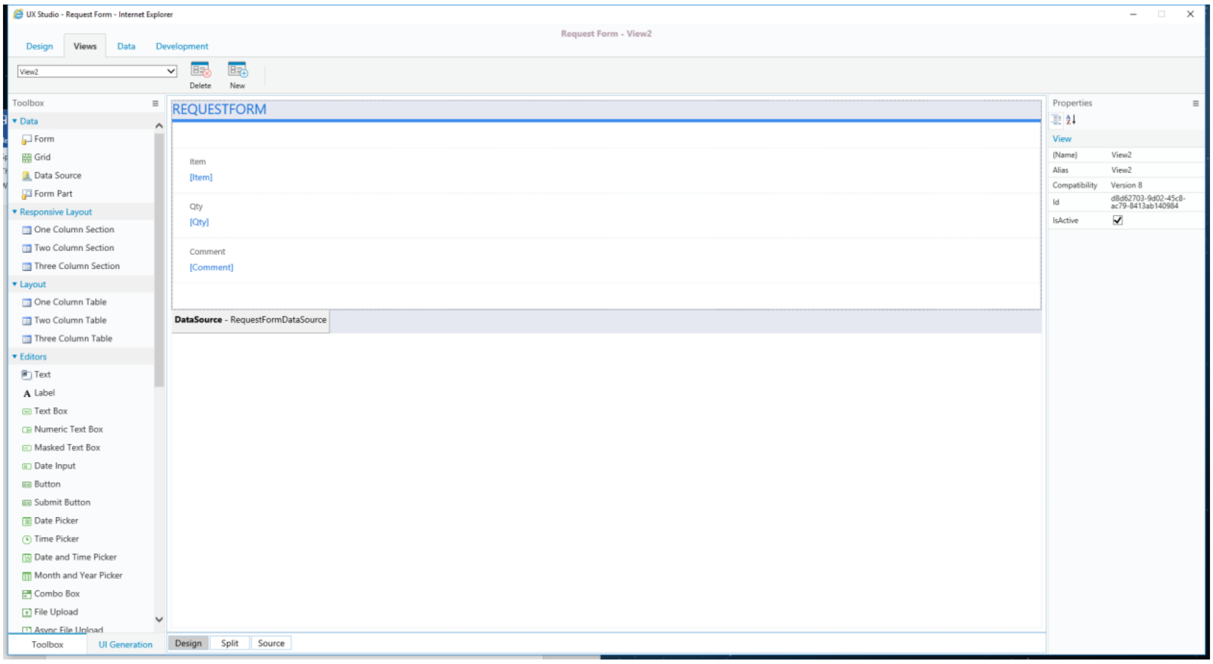
The Read Only Form view is created:



Read Only View Created

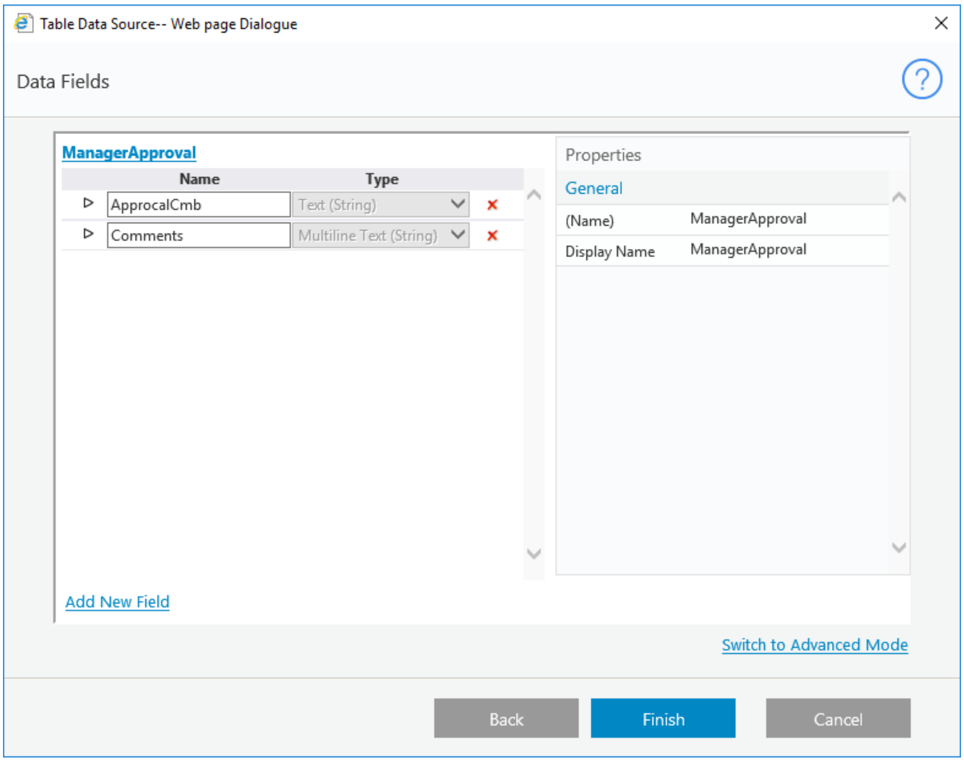
7. Add a Manager Approval Task to the workflow and add the following fields to its Form:

- **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.



Data Fields of the Task

9. In the Data Model, leave the key as activity instance ID (fldIActId).

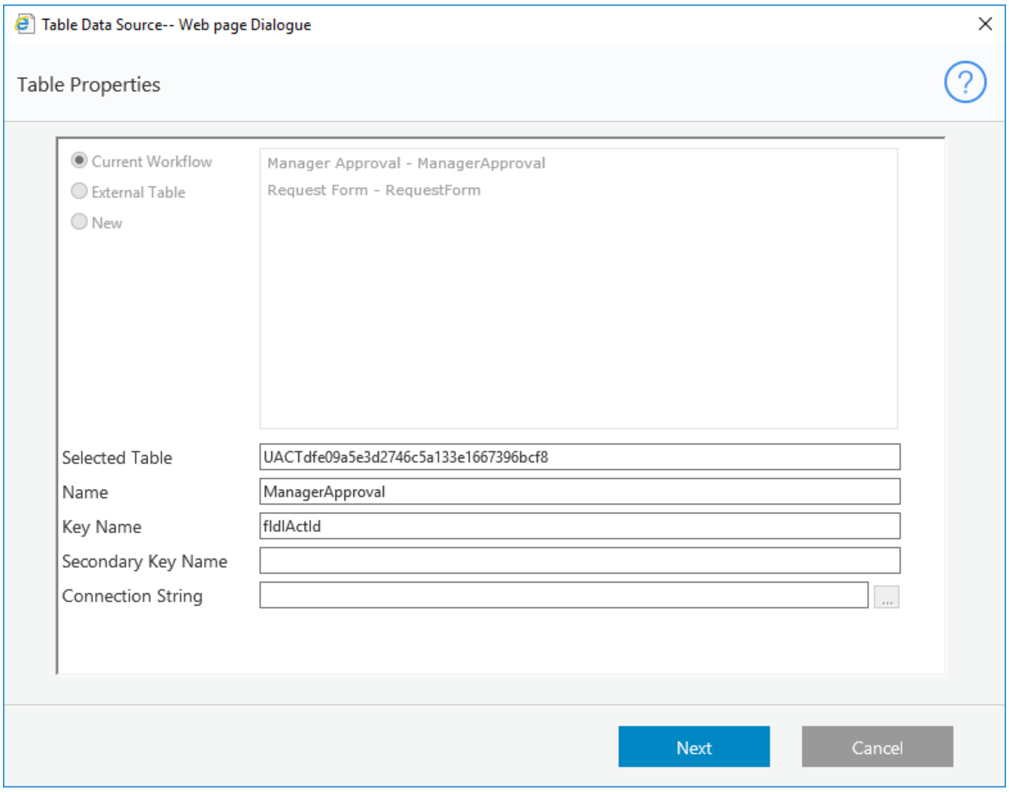
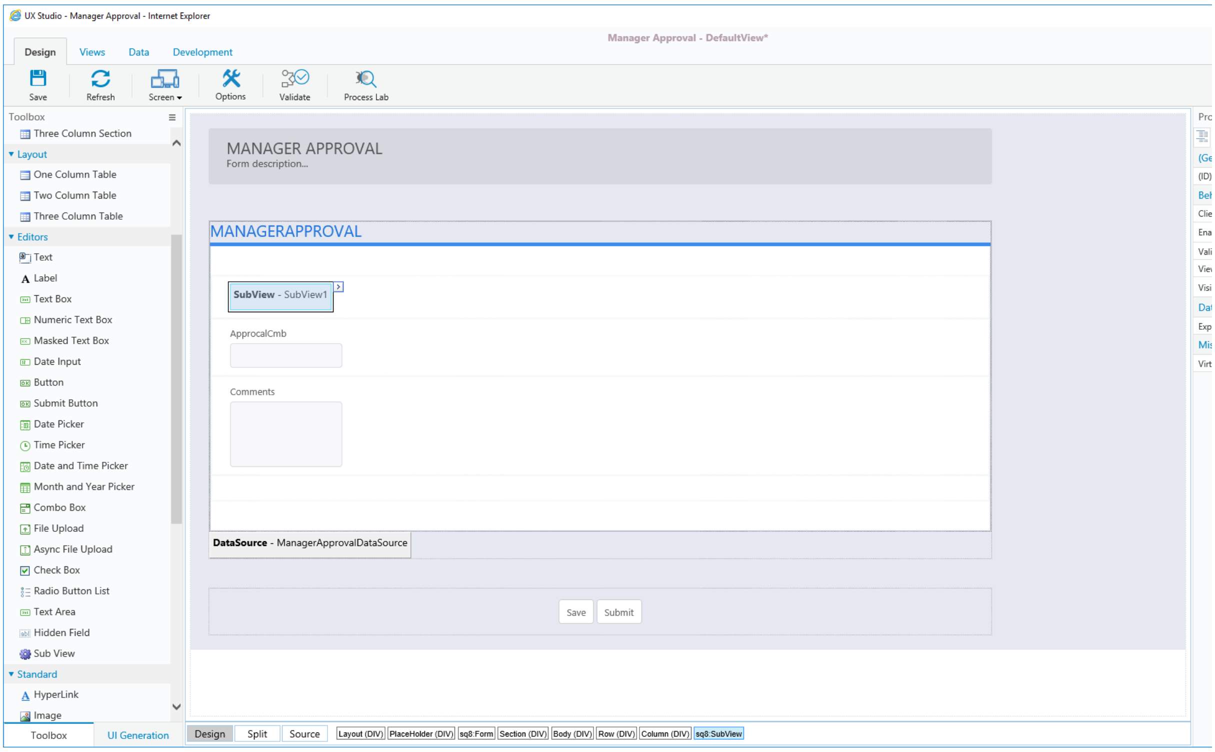


Table Properties

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

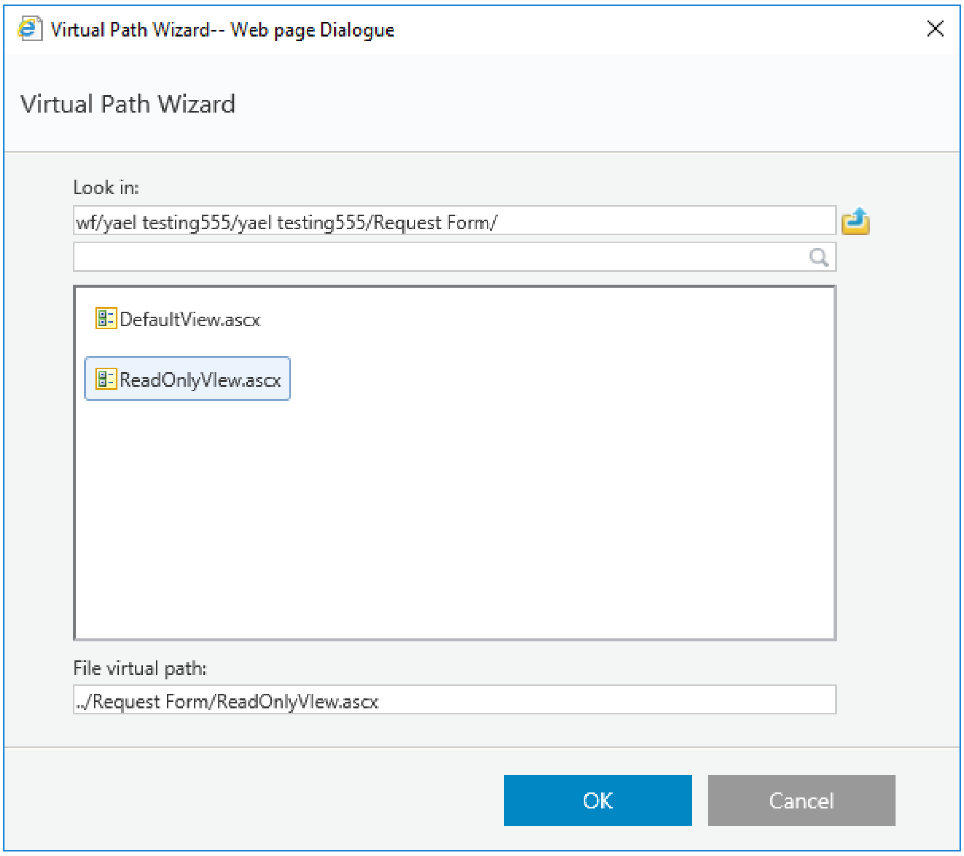
11. Add a Sub View control to the Approval Form:



Add Sub View

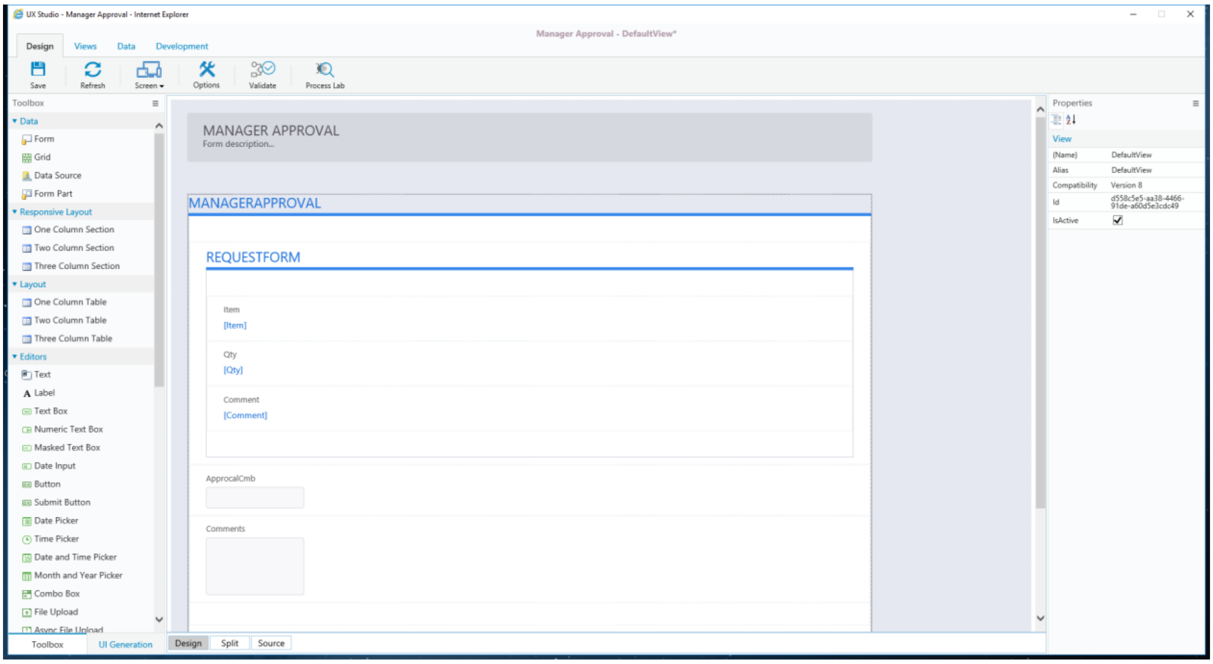
12. From the Sub View Properties (right side), click  beside Virtual Path.

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.