



Read-Only Form Views

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Introduction

Cora SeSequence 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. For example, within a Task activity.

Using this method, you can expose data that was entered in an early phase of the process to other users to help them take better and faster decisions.

Learning objectives

- Create a Read-Only view of an existing form.
- Embed the view in a new task.

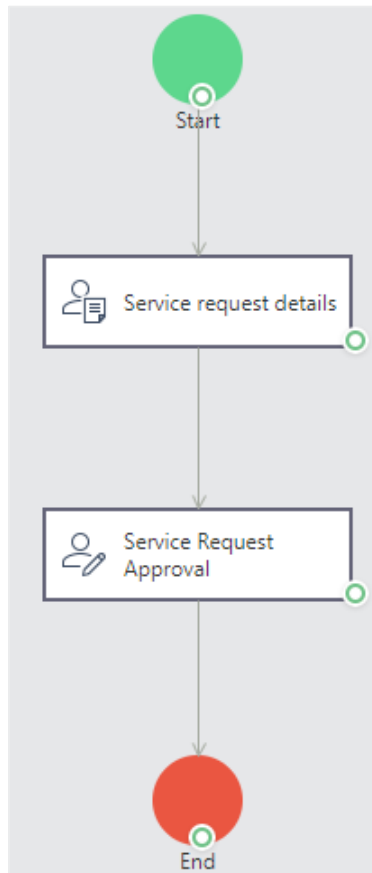
Prerequisites

Basic knowledge of developing processes with Cora SeSequence.

Scenario

In the following example, you will create a read-only view of a form, which you will then insert as a sub view into a Task activity. This is a common and useful scenario, which enables a task owner (for example, a manager) to review what was filled out in the original form before taking a decision, such as approving a service request, for example.

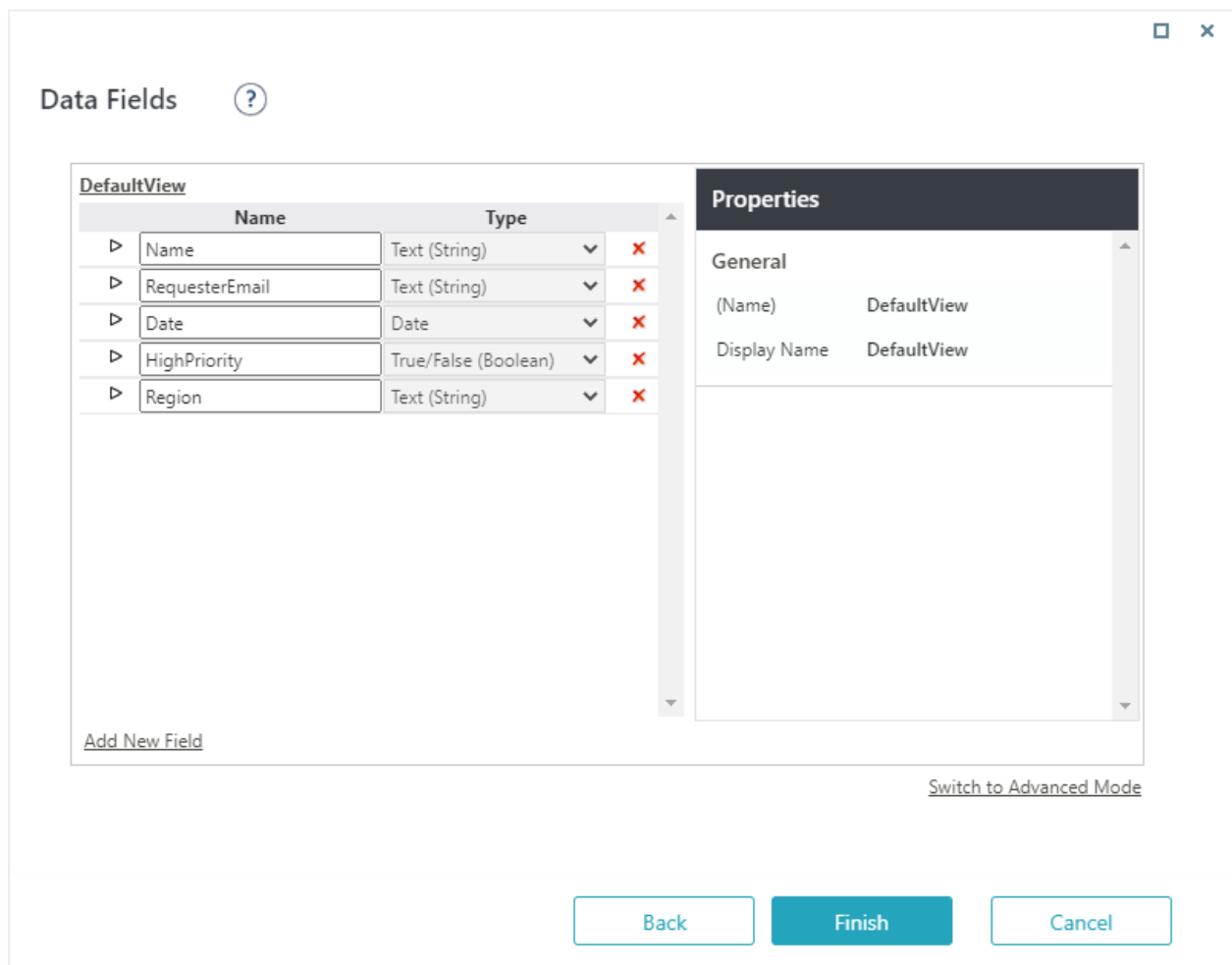
Sample workflow



Create a read-only form view

You can define a section of the form as a read-only view.

1. Add a Form activity to your workflow, and then add one table to the Data Model.
2. Set the key to be the workflow instance ID (**fIdIWfld**).
This means that this table can be used by other activities in the workflow.
3. In the Data Fields screen, add fields to the Form.



Data Fields ⓘ

DefaultView			
	Name	Type	
▷	Name	Text (String)	✕
▷	RequesterEmail	Text (String)	✕
▷	Date	Date	✕
▷	HighPriority	True/False (Boolean)	✕
▷	Region	Text (String)	✕

[Add New Field](#)

Properties

General

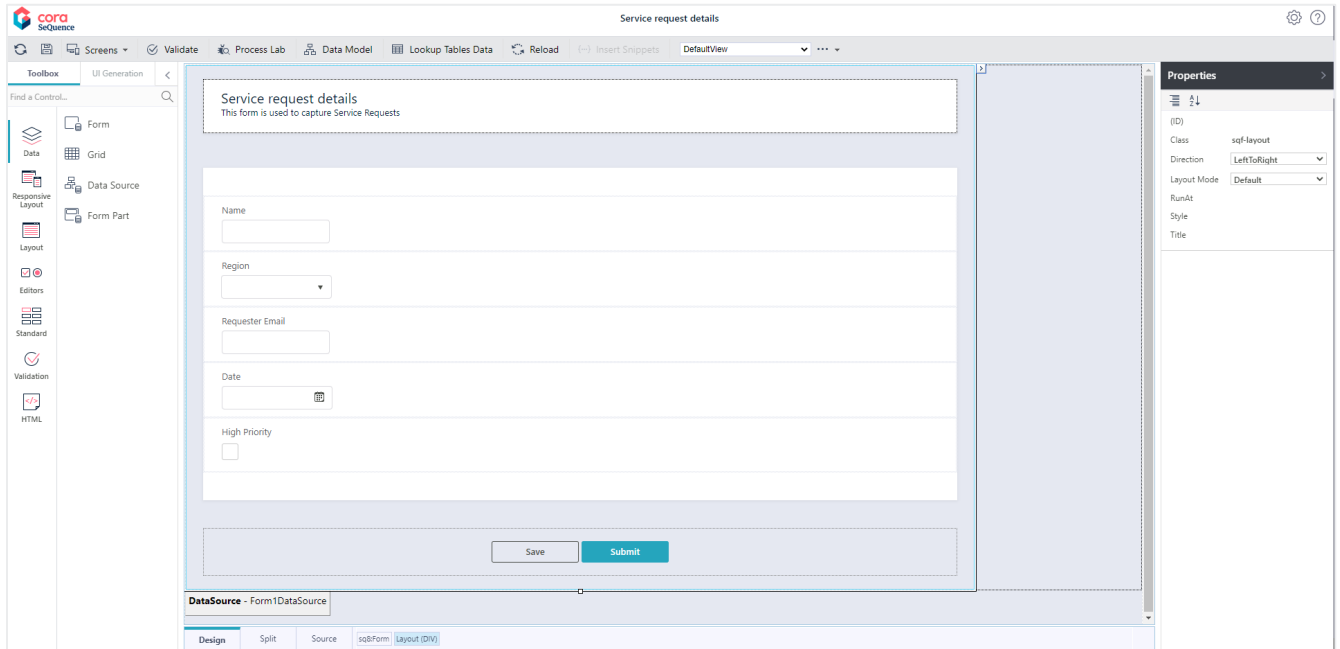
(Name) DefaultView

Display Name DefaultView

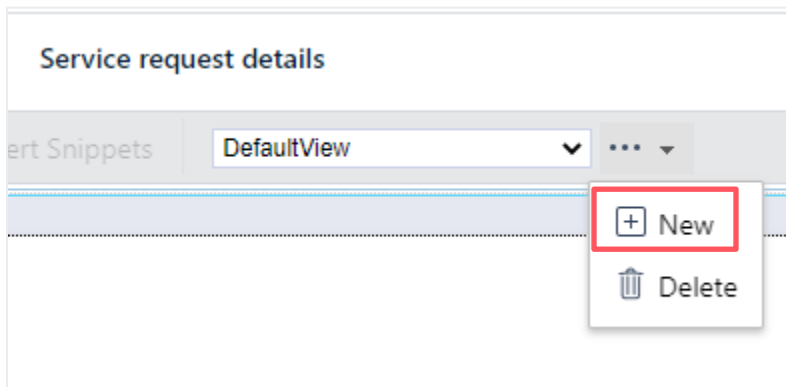
[Switch to Advanced Mode](#)

Back Finish Cancel

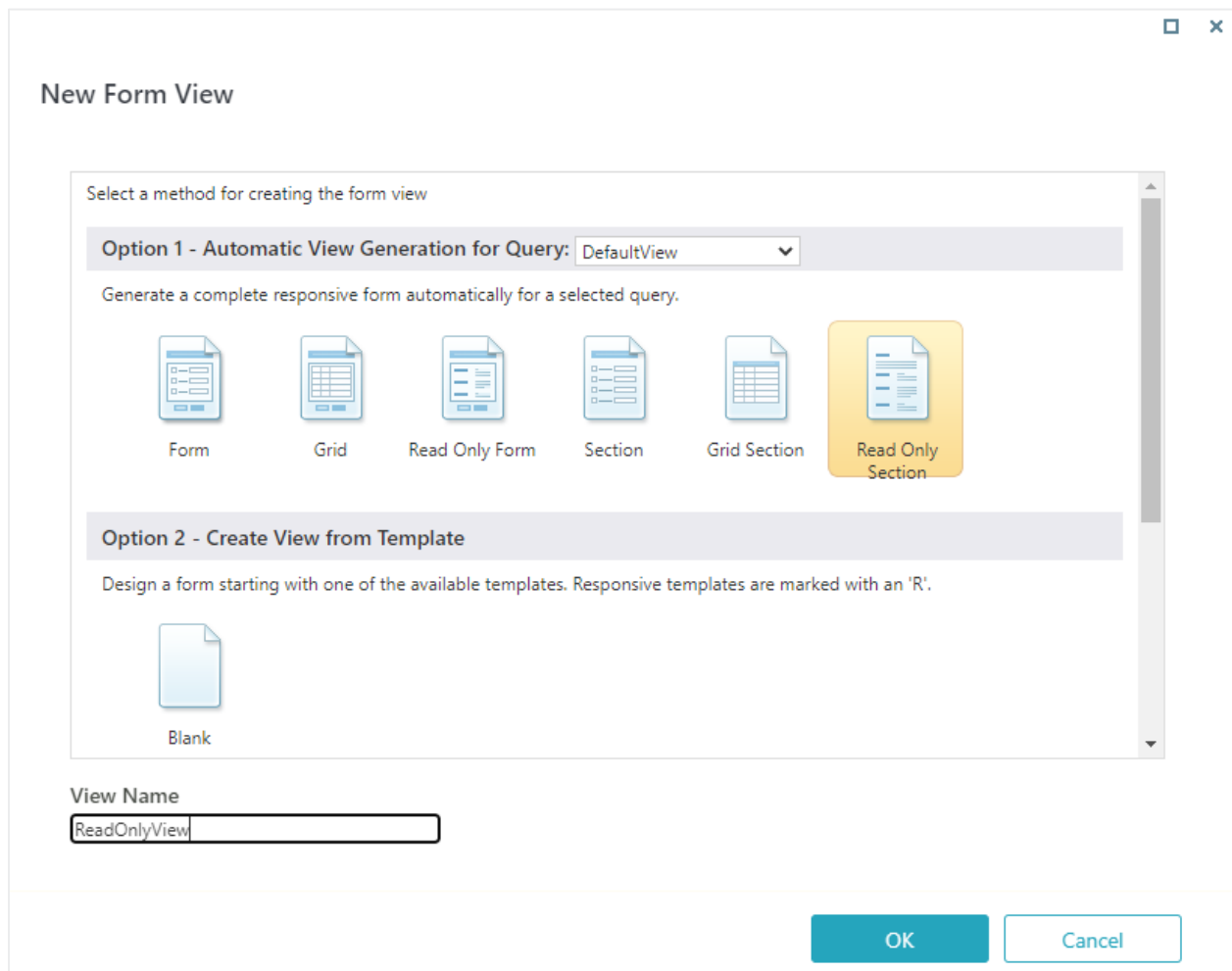
4. Select a Form Template and click **Finish**.
The Form is created.



5. Click the ellipsis button next to the Views area, and then select **New**:



6. In the New Form View screen:
 - a. Verify that the selected query is the one you have just created.
In the example below, it is **DefaultView**.
 - b. Click **Read Only Section**.
 - c. Under View Name, enter "ReadOnlyView."
 - d. Click **OK**.



New Form View

Select a method for creating the form view

Option 1 - Automatic View Generation for Query: DefaultView

Generate a complete responsive form automatically for a selected query.

Form Grid Read Only Form Section Grid Section **Read Only Section**

Option 2 - Create View from Template

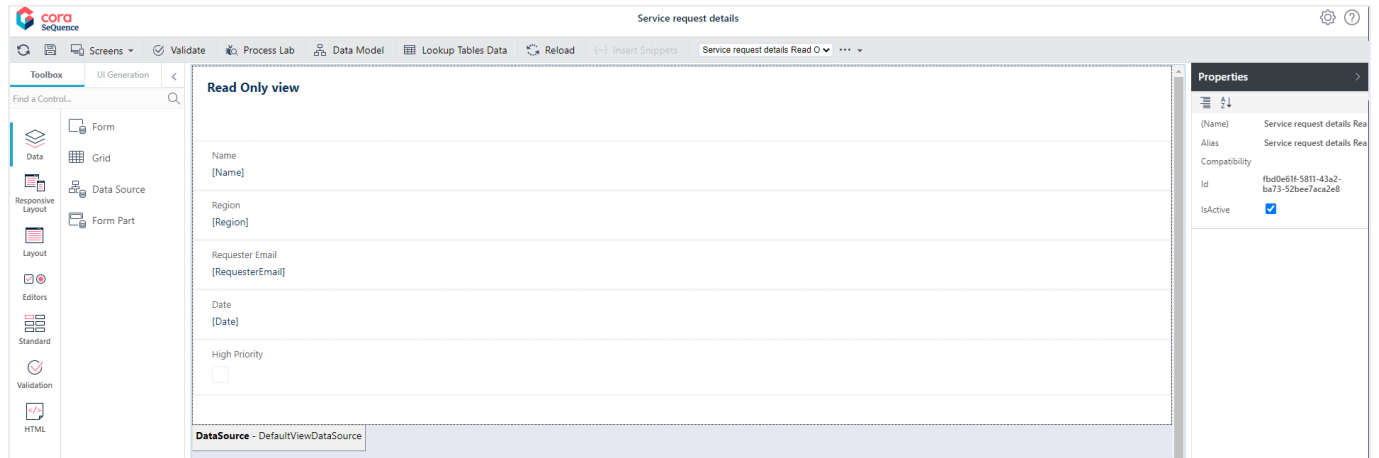
Design a form starting with one of the available templates. Responsive templates are marked with an 'R'.

Blank

View Name
ReadOnlyView

OK **Cancel**

The Read-Only form view is created.

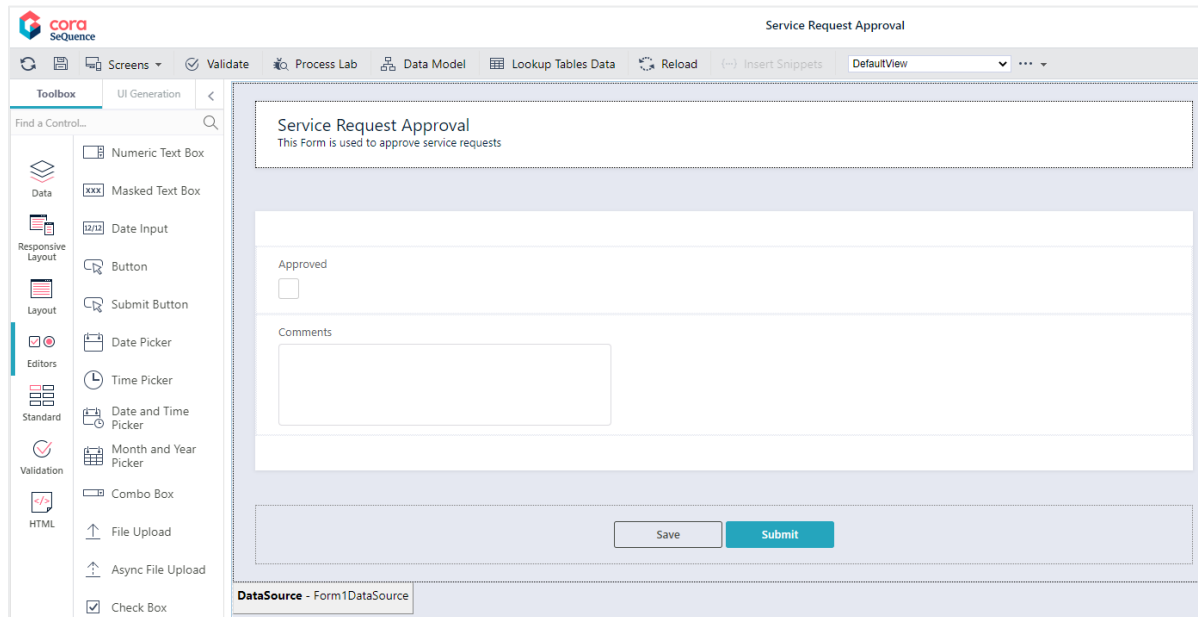


Add the read-only view to a new task

You can add a read-only view to a form. A read-only view displays information filled out in another form.

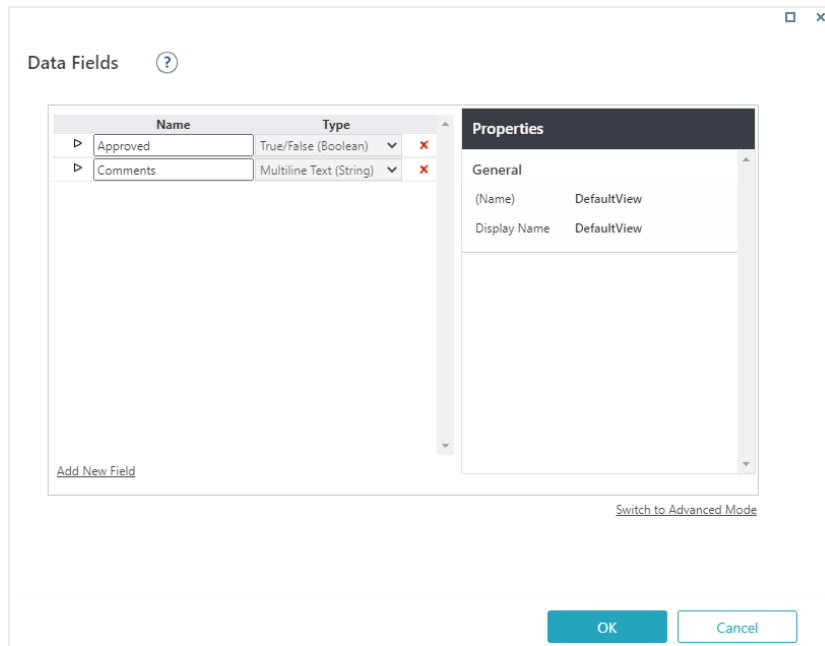
In this scenario, let's say that you need to add a Manager Approval Task to the workflow.

1. Add a Task activity to the workflow, and name it Service Request Approval.
2. Add the following fields to the task form:
 - a. **Approved:** a check box.
 - b. **Comments:** a free-text area.



The screenshot shows the Cora Sequence IDE interface for designing a form titled "Service Request Approval". The form is displayed in a design view with a light blue background. At the top, there is a header with the Cora Sequence logo and the title "Service Request Approval". Below the header is a toolbar with various icons for actions like "Screens", "Validate", "Process Lab", "Data Model", "Lookup Tables Data", "Reload", and "Insert Snippets". The main design area is divided into a "Toolbox" on the left and the form design on the right. The "Toolbox" contains various controls categorized by type: Data (Numeric Text Box, Masked Text Box), Responsive Layout (Date Input, Button, Submit Button), Layout (Date Picker, Time Picker, Date and Time Picker, Month and Year Picker), Editors (Date Picker, Time Picker, Date and Time Picker, Month and Year Picker), Standard (Date Picker, Time Picker, Date and Time Picker, Month and Year Picker), Validation (Date Picker, Time Picker, Date and Time Picker, Month and Year Picker), HTML (File Upload, Async File Upload, Check Box), and HTML (File Upload, Async File Upload, Check Box). The form design on the right shows a title "Service Request Approval" with a subtitle "This Form is used to approve service requests". Below the title are two main sections: "Approved" with a checkbox and "Comments" with a text area. At the bottom are "Save" and "Submit" buttons. A "DataSource - Form1DataSource" is indicated at the bottom left of the form area.

3. Connect these fields to data sources.



Name	Type
Approved	True/False (Boolean)
Comments	Multiline Text (String)

Properties

General

(Name) DefaultView

Display Name DefaultView

Buttons: Add New Field, Switch to Advanced Mode, OK, Cancel

4. In the Data Model, leave the key name as activity instance ID (**fldlActId**).

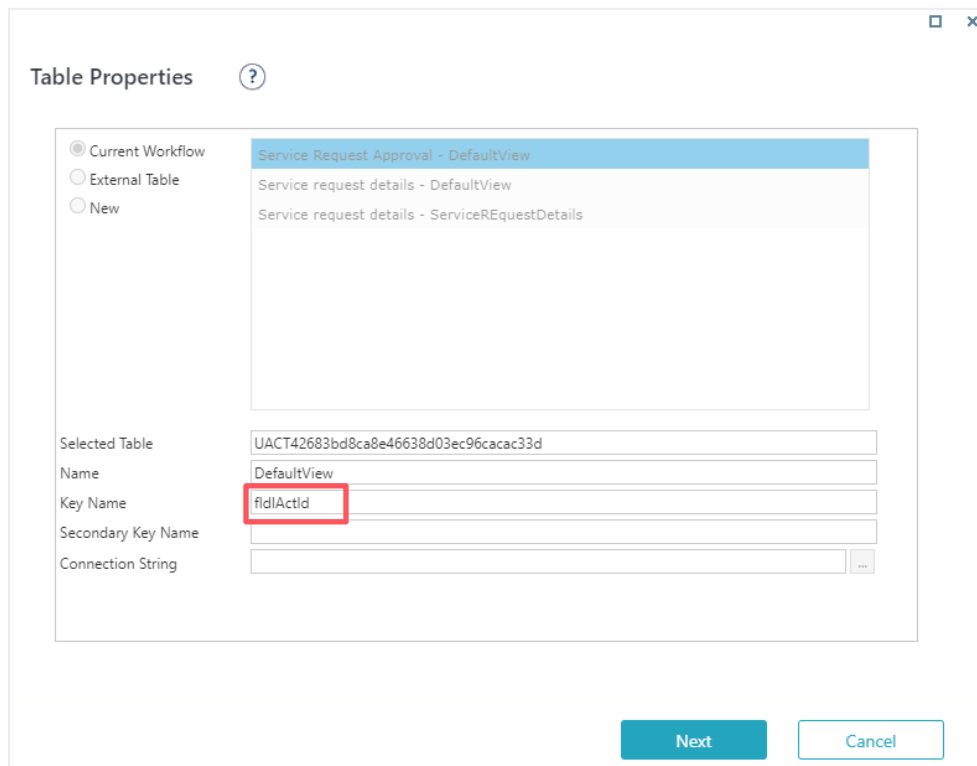


Table Properties

Current Workflow
 External Table
 New

Service Request Approval - DefaultView

Service request details - DefaultView

Service request details - ServiceREquestDetails

Selected Table: UACT42683bd8ca8e46638d03ec96cacac33d

Name: DefaultView

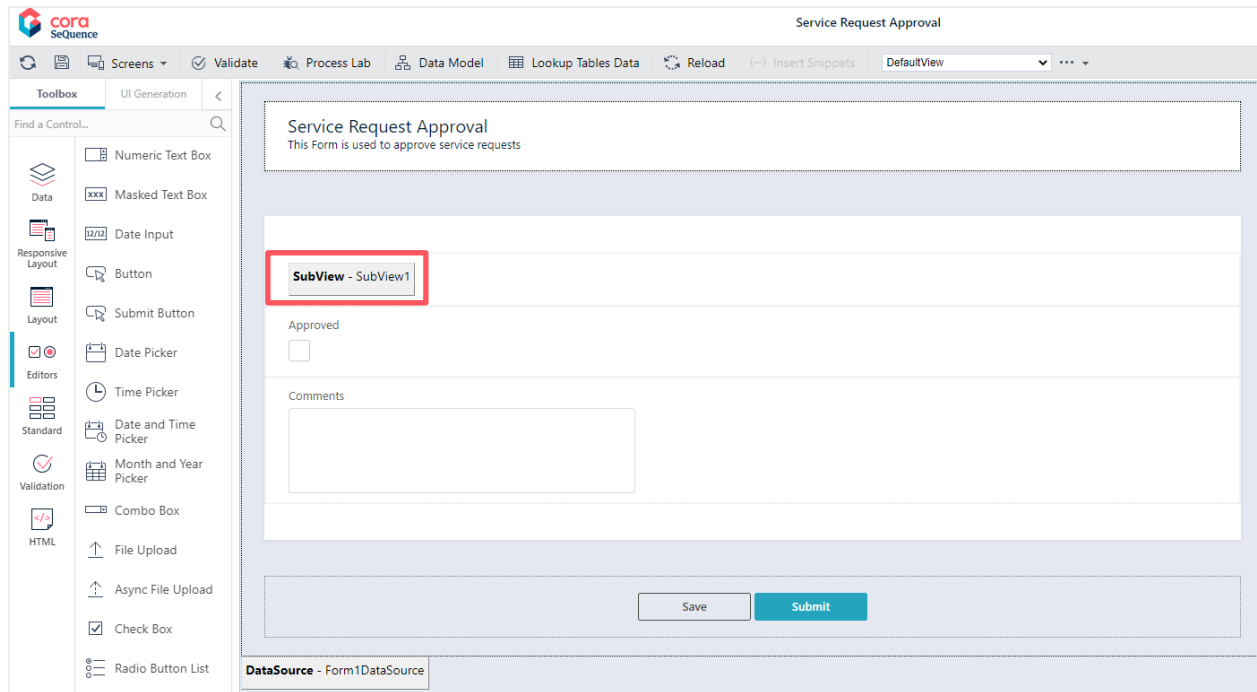
Key Name: **fldlActId**


Secondary Key Name:

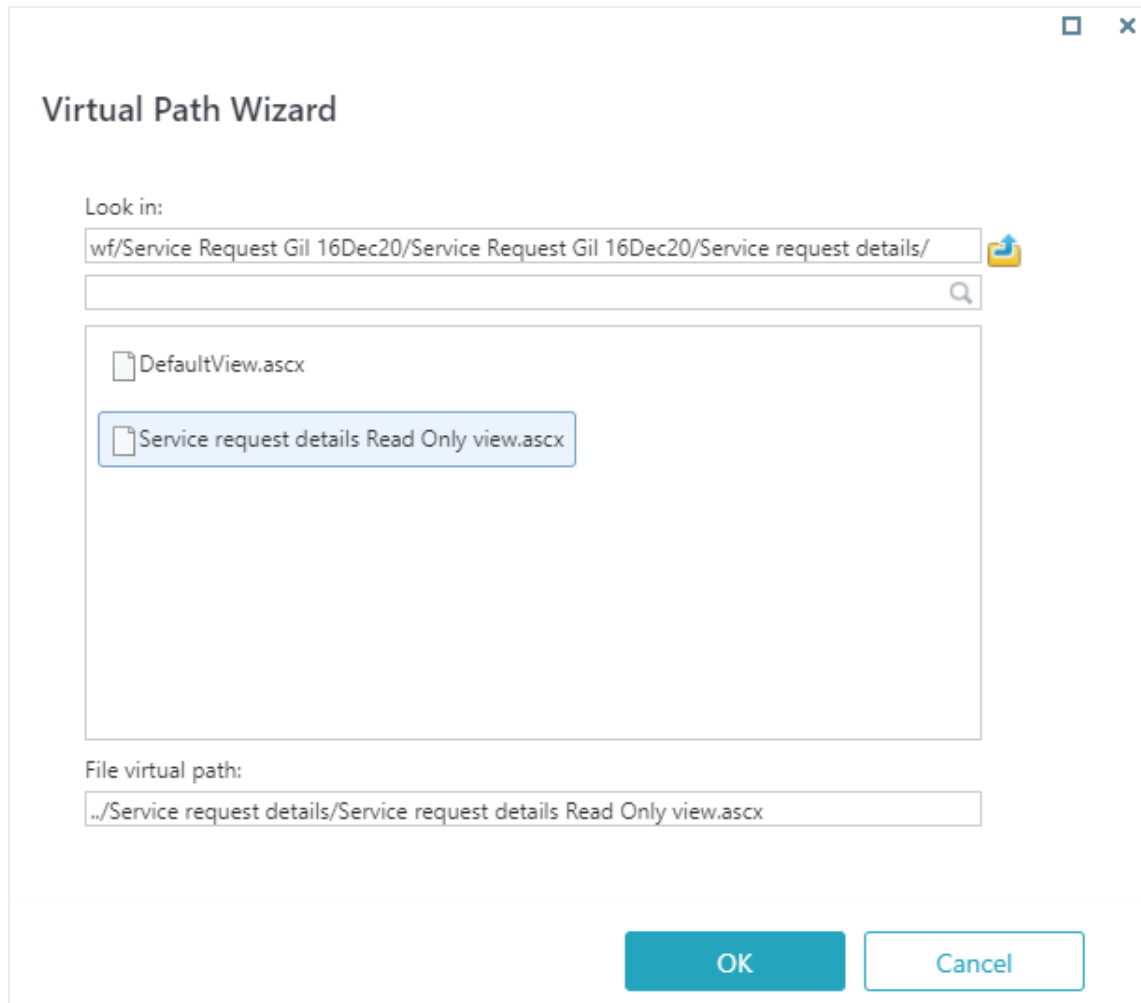
Connection String:

Buttons: Next, Cancel

5. Add a Sub View control to the form.

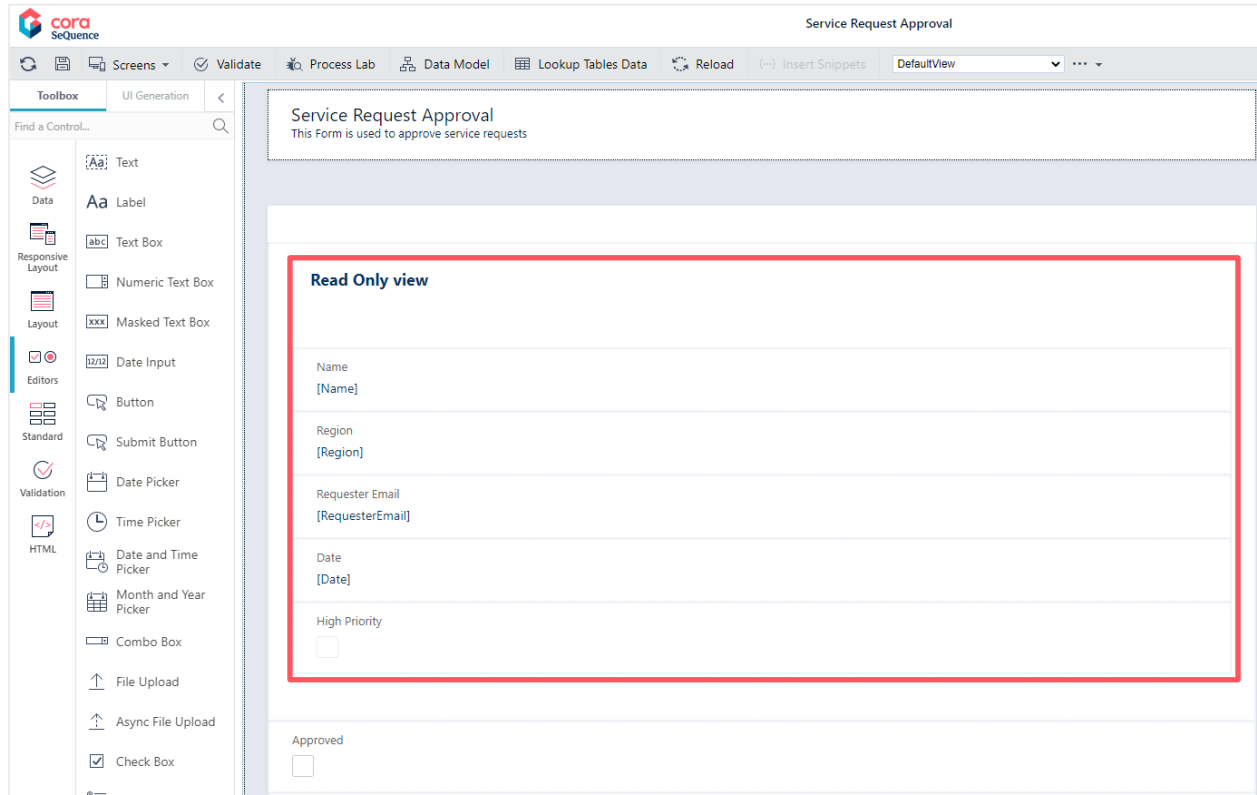


6. Select the SubView control, and in the Properties pane, under Misc, click the ellipsis button next to **Virtual Path**.
7. Click , and in the list of workflows, double click your workflow.
8. From the list of activities, select the form that contains the **Read Only view** that you created previously.
The virtual path to the SubView is added.



9. Click **OK**.

The original form is added to the Task as a Read-Only view.



When the Task is fetched, the approver can review the information displayed as read-only before approving.