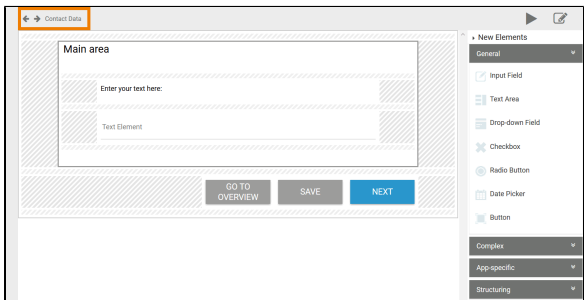


Step 3: Designing the Forms

Basis for the feasibility of a process are the forms designed within your EPC models. Each form is assigned to a function. Now you have to design the forms for **ACME's** address book.

Designing a Form



You opened the form **Co**ntact Data.

If you create a new app project, the first form in the **Referen**ce model contains a predefined area including the following elements:

- the responsive element **Main Area**
- the division **Enter your text here:**
- the input field **Text Element**
- the preconfigured buttons **Go to overview, Save** and **Next**

At the right side of the workspace you will find the **Sidebar New Elements**. Use it to drag and drop additional form fields onto the workspace.



Step 4:
Configuring the
Overview



Step 4:
Configuring the
Overview

On this Page:

- [Designing a Form](#)
- [Reusing Forms](#)
- [Designing a Summary Form](#)

Related Documentation:

- [BPaaS](#)
 - [Modeling Processes](#)
 - [Executing Processes](#)

► New Elements

General



Complex



App-specific



Process Navigation



Instance Table



Instance View



Process App Link
(single)



Process App Link
(multiple)

Structuring



The elements are classified in four categories:

- General
- Complex
- App-specific
- Structuring

Click on the category name to display the associated elements.



Refer to [BPaaS Guide > Creating Inform Elements](#) to learn more about the creation of form elements and how to use them.

← → Contact Data

Customer Datasheet

Enter your text here:

Text Element

GO TO OVERVIEW SAVE NEXT

• Edit: Responsive

Name
Customer Datasheet

Description

Hashtags

Additional CSS Classes

☒ Show Label

You can define additional field properties for the active element (marked by a red border) using the **Edit Sidebar**.

Here you can for example change the name of the element, define whether it should be a mandatory field and much more.

Now use the already existing form fields:

- Rename the existing responsive element Main area in Customer Datasheet.

Customer Datasheet

Company

GO TO OVERVIEW SAVE NEXT

• Edit: Input Field

Name
Company

Description

Hashtags

Additional CSS Classes

Current Value

☒ Mandatory

☐ Read Only

☒ Focus on Element

☐ Show Label Inline

☐ Hide Input

Validation Expression

Field Name in Container
Company

☒ Save Value in Instance

• Rename the existing input field **Text** element in **Company** and change its settings:

- Mark the element as **Mandatory**.
- Deactivate the option **Show Label Inline**.
- Insert the **Field Name** in **Container** **Company**.



For details about the concept of the **Field Name Container** refer to [BPaaS Guide > The Container Principle](#).

Customer Datasheet

Company

Contact Person

First Name

Last Name

Position

Notes

GO TO
OVERVIEW

SAVE

NEXT

Create additional form elements, for example:

- **Responsive Element:** Contact Person
- **Input Field:** First Name with Field Name in Container first Name
- **Input Field:** Last Name with Field Name in Container last Name
- **Input Field:** Position
- **Text Area:** Notes

YScheer | PAS

Jane Marple
ACME Corp.

Contact Data

Customer Datasheet

Company

Contact Person

First Name

Last Name

Use the **Play** button to execute your model.

If you use the preview function in the Forms Editor, only the **current form** is displayed.

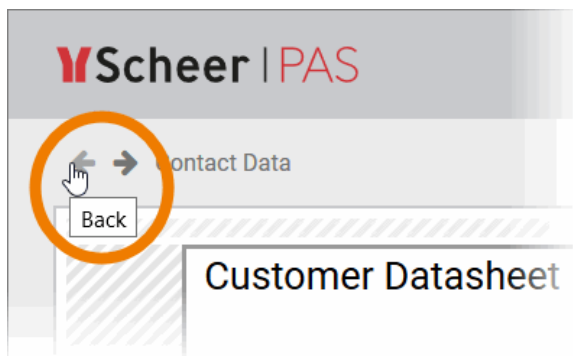
The form view is displayed in a pop-up window.

By clicking on the corresponding icons, you can switch between different views:

- View on a **desktop computer**
- View on a **tablet**
- View on a **mobile phone**

In test mode, you are also able to insert text in your form fields.

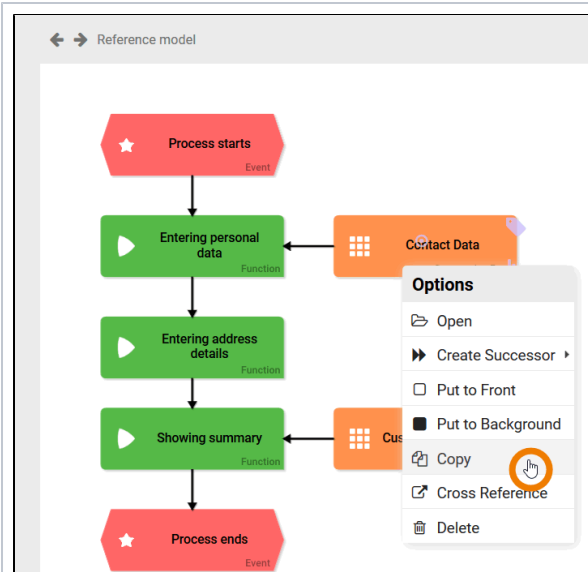
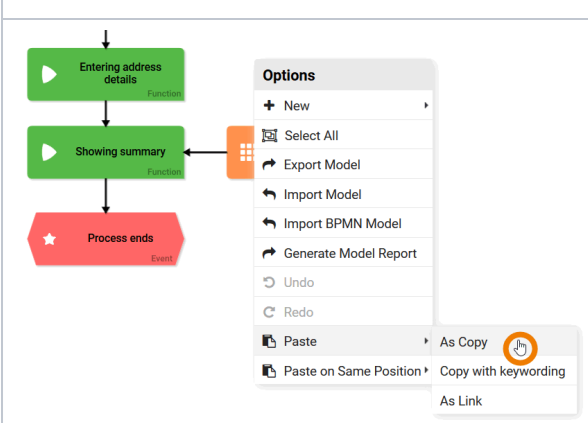
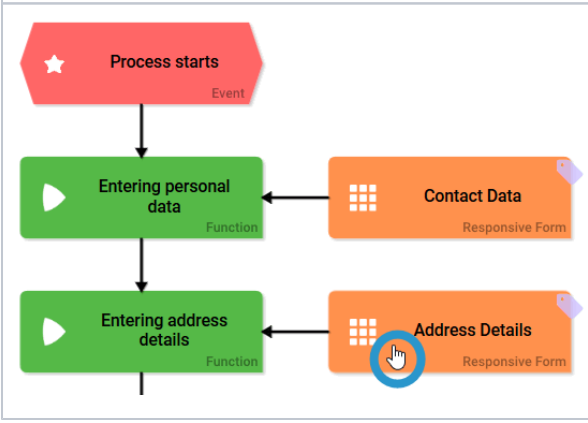
After testing close the pop-up window.



If you want to add more fields or rework the layout, you can now make further adjustments in the Forms Editor.

When your form is finished, navigate back to the EPC.

Reusing Forms

 <p>Reference model</p> <p>Process starts (Event)</p> <p>Entering personal data (Function)</p> <p>Entering address details (Function)</p> <p>Showing summary (Function)</p> <p>Process ends (Event)</p> <p>Contact Data (Form)</p> <p>Options menu:</p> <ul style="list-style-type: none">OpenCreate SuccessorPut to FrontPut to BackgroundCopy (highlighted)Cross ReferenceDelete	<p>In the next process step, the user shall insert the address details of the customer, but the contact person's details should also be displayed again. Therefore you can reuse the first form Contact Data.</p> <p>Right-click on the form element Contact Data to open the context menu. Select option Copy.</p>
 <p>Entering address details (Function)</p> <p>Showing summary (Function)</p> <p>Process ends (Event)</p> <p>Options menu:</p> <ul style="list-style-type: none">NewSelect AllExport ModelImport ModelImport BPMN ModelGenerate Model ReportUndoRedoPaste<ul style="list-style-type: none">As Copy (highlighted)Copy with keywordingAs LinkPaste on Same Position	<p>Then right-click on the empty workspace and choose the context menu option Paste > As Copy.</p> <p>A copy of the first form is created on the workspace.</p>
 <p>Process starts (Event)</p> <p>Entering personal data (Function)</p> <p>Entering address details (Function)</p> <p>Process ends (Event)</p> <p>Contact Data (Form)</p> <p>Address Details (Form)</p>	<p>Rename the form element, for example to Address Details, and connect it to the function Entering address details.</p> <p>Open the new form.</p>

← → Address Details

Customer Datasheet

Company

Contact Person

First NameLast Name

Position

Notes

GO TO OVERVIEWSAVENEXT

New Elements

General

Input Field

Text Area

Drop-down Field

Checkbox

Radio Button

Date Picker

Button

Complex

App-specific

Structuring

The copy contains the content of the first form.

Extend the content by creating further form fields for the address details.

Customer Datasheet

Company

Contact Person

First NameLast Name

Position

Notes

Address Details

Streetno

Address Addition

ZIP CodeCity

Country

Contact Details

Phone

Mobile

E-mail

Internet Address

GO TO OVERVIEWSAVENEXT

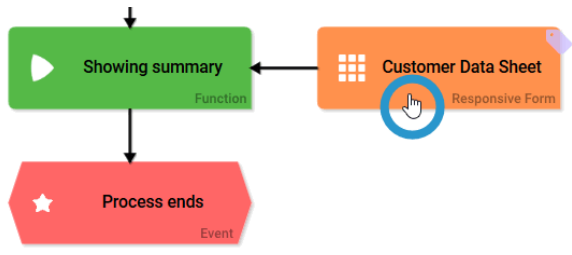
In our example, we added the following fields:

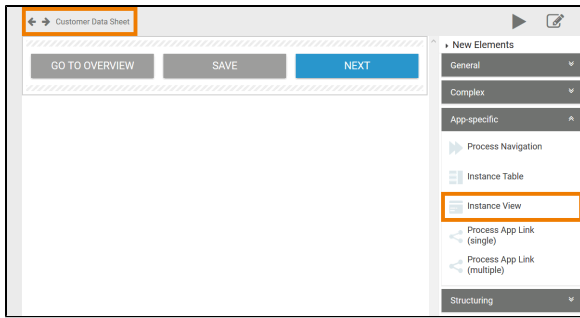
- Responsive Element: Address Details
- Input Field: Street
- Input Field: no
- Input Field: ZIP
- Input Field: City
- Input Field: Country
- Input Field: Phone
- Input Field: Mobile
- Input Field: E-mail
- Input Field: Country

	<ul style="list-style-type: none"> • Responsive Element: Contact Details • Input Field: Phone • Input Field: Mobile • Input Field: Email • URL Field: Internet Address with Field Name in Container internet
	<p>When your form is finished, navigate back to the EPC.</p>

Designing a Summary Form

In the last process step, all entered customer data should be displayed in a summary. The creation of a summary form is very easy, as a preconfigured form element exists for this purpose.

 <pre> graph TD A[Customer Data Sheet Responsive Form] --> B[Showing summary Function] B --> C[Process ends Event] </pre>	<p>Open the last form Customer Data Sheet.</p>
--	--



A newly created Responsive Form element is empty.

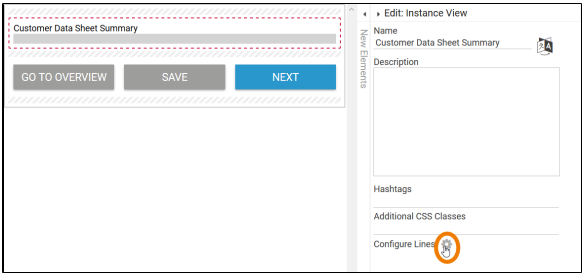
It contains only three preconfigured default buttons:

- Go to overview
- Save
- Next

Open the category **App-specific** in the Sidebar New Elements. Here you will find the necessary form element to create a summary: **Instance View**.



For further information about the Instance View



Drag the element to the workspace and rename it (for example **Customer Data Sheet Summary**).

In the element's settings in the Edit Sidebar you can find the option **Configure Lines**. Open the configuration editor by clicking on the gear wheel.

A wizard supports you during the configuration.

The wizard is divided into two parts:

Configure Lines

Fields of Reference EPC

Type Filter

☒ Last Name
Type: Input Field

☒ First Name
Type: Input Field

☒ Position
Type: Input Field

☐ Notes
Type: Text Area

☒ Street
Type: Input Field

☒ Country
Type: Input Field

☐ Internet Address
Type: URL

☒ No
Type: Input Field

View Lines

>

<

SAVE CANCEL

- **Fields of Reference EPC:** On the left side of the wizard you see all form fields that you have created in your forms.
- **View Lines:** On the right side of the wizard you see the fields that are displayed in the instance view.

If you want to use all fields, click button >> to take the whole content over.

Accordingly, a click on the button << removes all fields from the instance view.

Drag and drop the fields you want to display in the summary to the right side of the wizard.

You can also use the wizard's search function to find specific fields.

Configure Lines

Fields of Reference EPC

Com Type Filter

☒ Company
Type: Input Field

☒ Company
Type: Input Field

View Lines

☒ First Name
Type: Input Field

☒ Last Name
Type: Input Field

Configure Lines

Fields of Reference EPC


Type Filter -

>

<

View Lines

- ☒ Address Addition
Type: Input Field
- ☒ ZIP Code
Type: Input Field
- ☒ City
Type: Input Field
- ☒ Country
Type: Input Field
- ☒ Phone
Type: Input Field
- ☒ Mobile
Type: Input Field
- ☒ Email
Type: Input Field
- ☒ Internet Address
Type: URL

SAVE  CANCEL

When you have finished the configuration, leave the editor with **Save**.

← → Customer Data Sheet

Customer Data Sheet Summary

Company	
First Name	
Last Name	
Position	
Notes	
Street	
no	
Address Addition	
ZIP Code	
City	
Country	
Phone	
Mobile	
Email	
Internet Address	

GO TO OVERVIEW SAVE NEXT

The element in the Forms Editor now shows the selected content.

You have finished designing your forms.

Before you can execute your app, you have to configure the overview. To do so, switch back to the content of the app project.