

Using the Instance View

Creating a Summary

Once an instance has reached the last process step, it is finished but still available via the Process App Overview. The data of the last process step is always displayed in read-only mode in its last form. If you want to make sure that the user still has access to all necessary information after the instance has been finished, we recommend to insert a summary as the last process step. A simple way to achieve this is to use the form element [Instance View](#).

Example: Summary in ACME's Procurement Process

Employee
Role

Head of Accounting
Role

Head of Purchasing
Role

Confirming delivery
Function

Showing order summary
Function

Procurement Process ends
Event

Inspection of Delivery
Responsive Form

Order Summary
Responsive Form

Irene Adler wants to display a summary of the procurement process after the step Confirming Delivery has been completed.

To do this, she inserts the function Showing Order Summary as the last process step in her EPC and links it to the Order Summary form.

Procurement Request Summary

GO TO OVERVIEW

SAVE

NEXT

Edit: Instance View

Name
Procurement Request Summary

Description

Hashtags

Additional CSS Classes

Configure Lines

In the form Order Summary, Irene inserts an instance view element and names it Procurement Request Summary.

Now all she has to do is define the contents. To do this, she clicks on the gear wheel of the setting **Configure Lines**.

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- [Printing a Summary](#)

Related Pages:

- [Form Elements](#)
 - [Instance View](#)
- [Service](#)
 - [Bidding Process](#)

Configure Lines

Fields of Reference EPC

Type Filter ▾

Signature
Type: Signature

Picture of Damage/Defects
Type: Camera

Details of Damage or Defects
Type: Text Area

Department
Type: Drop-down Field

Upload Delivery Notice
Type: Files Upload

Order List
Type: References from I Web Service(s)

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View Lines

SAVE

CANCEL

The **Configure Lines** wizard opens.

All form elements that are used in the forms of the reference EPC are displayed in the left column of the wizard.

Irene moves the fields she wants to display to the right column **View Lines**.

With the
button



all fields can be transferred from the left to the right column.

A click on
the button



removes all fields from the right column of the wizard.

Configure Lines

Fields of Reference EPC

Depart

Type Filter ▾

Department

Type: Drop-down Field

Department

Type: Drop-down Field

Department

Type: Drop-down Field

View Lines

Name

Type: Input Field

Creation Date

Type: Date Picker

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SAVE

CANCEL

To find a field by its name, Irene can use the text filter.

Configure Lines

Fields of Reference EPC

Type Filter -

- Input Field
- Division
- Radio Button
- Text Area
- Date Picker
- Signature
- Camera
- Drop-down Field
- Files Upload
- Process App Link (multiple)
- Icon

View Lines

Name
Type: Input Field

Creation Date
Type: Date Picker

Department
Type: Drop-down Field

SAVE CANCEL

Using the type filter, Irene can find form elements of a specific type.

A click on a type activates the filter, another click removes it again. Several types can be set at the same time.

You can also combine the text and the type filter.

Configure Lines

Fields of Reference EPC

Type Filter -

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Order Value

Type Input Field

☐

Division-myYZ

Type Division

☒

Request Number

Type Input Field

☐

Division-myYZ

Type Division

☐

Division-c90K

Type Division

☐

Number of Ordered Items

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View Lines

☒

Name

Type Input Field

☐

Creation Date

Type Date Picker

☐

Department

Type Drop-down Field

☒

Order Value

Type Input Field

☐

Picture of Damage/Defects

Type Camera

☐


Signature

SAVE

CANCEL

Irene has added all the fields she wants to use in the summary, so she saves her selection using button **Save**.

You can leave the pop-up window via the **Cancel** button.



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Procurement Request Summary	
Request Number	
Creation Date	
Name	
Department	
E-Mail	
Type of Request	
Order Value	
Number of Ordered Items	
Condition of Ordered Items	
Details of Damage or Defe...	
Picture of Damage/Defects	
Signature	

[GO TO OVERVIEW](#)
[END REQUEST PROCESS](#)

The instance view is now presented with all selected contents.

When the app is executed, the instance view is filled with the values that the user entered in the app:

Procurement Request Summary	
Request Number	1567672991535
Creation Date	2019 Sep 05
Name	Irene Adler
Department	
Value	Name
Management	Management
E-Mail	irene.adler@acme-corp.com
Type of Request	
Value	Name
New	New
Order Value	131.48
Number of Ordered Items	
Value	Name
Incomplete	Incomplete
Condition of Ordered Items	
Value	Name
Intact	Intact
Details of Damage or Defects	Only 4 highlighter have been delivered.
Signature	
Name	Full URL
6c4c022a-1257-40a5-837f-75923edea920	https://scheer-acme.com:443/pas-doc/app/storage/acme_corp/6c4c022a-1257-40a5-837f-75923edea920

[Go to overview](#)
[End Request Process](#)



The values of some form elements are stored as value pairs (see chapter [Possible Values: Value and Label](#)). The instance view takes this into account and displays both contents: *value* and *label*, if available.

Printing a Summary

In some cases you may want to print the contents of a summary. If you use the instance view to display a summary, you can do this using the browser function **Print**.

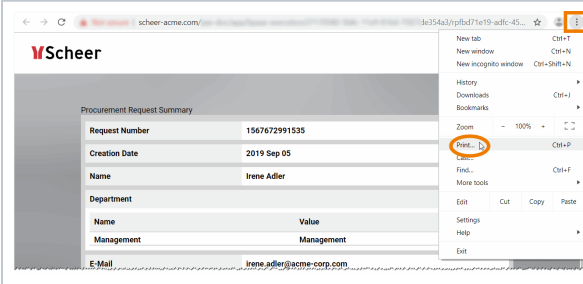
Example: Printing an Instance from ACME's Procurement App

Procurement Request Summary

Request Number	1567672991535
Creation Date	2019 Sep 05
Name	Irene Adler
Department	
Value	Name
Management	Management
E-Mail	irene.adler@acme-corp.com
Type of Request	
Value	Name
New	New
Order Value	131.48
Number of Ordered Items	
Value	Name
Incomplete	Incomplete
Condition of Ordered Items	
Value	Name
Intact	Intact
Details of Damage or Defects	Only 4 highlighter have been delivered.
Signature	
Name	Full URL
6c4c022a-1257-40a5-837f-75923edea920	https://scheer-acme.com:443/pas-doc/app/storage/acme_corp/6c4c022a-1257-40a5-837f-75923edea920

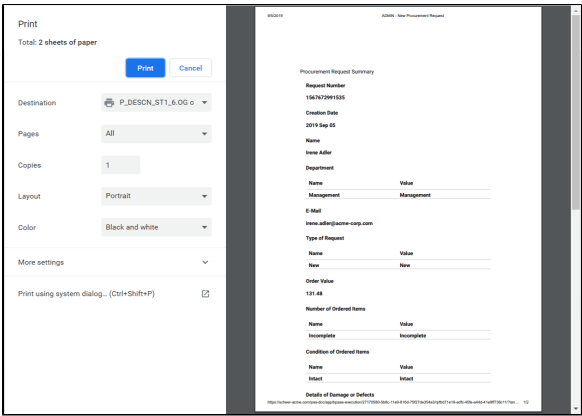
Go to overview End Request Process

Irene Adler has completed an instance in the Procurement app. In the last step, the summary is displayed. She now wants to print it out.



Irene uses the browser Chrome.

She opens the settings menu and selects the option **Print**.



The contents of the summary will open in the Chrome print preview.

Irene can now adjust the print settings according to her needs, for example...

- ... select the appropriate printer.
- ... define the pages to be printed.
- ... define the number of printouts.
- ... set portrait or landscape format.

Then Irene chooses the button **P**rint to execute the print order.

In the Firefox browser, the print f

Print

Total: 2 sheets of paper

Print

Cancel

Destination



Microsoft Word 2016

Pages

All

Copies

1

Layout

Portrait

Color

Black and white

More settings



Print using system dialog... (Ctrl+Shift+P)



unction can also be found in these settings under **P**rint and these settings in the print preview window can also be adjusted

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