


Searching for Instances

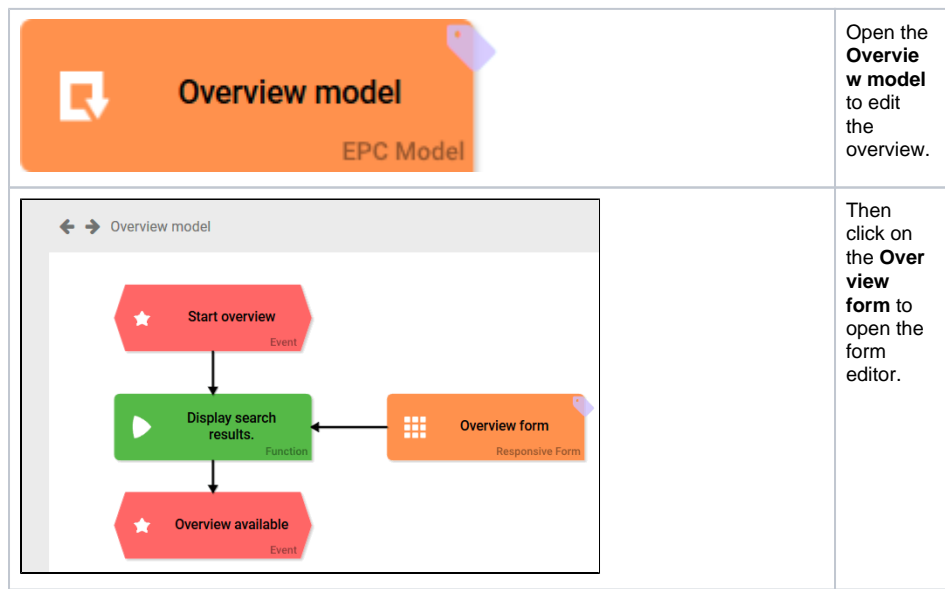
A process app offers two basic functionalities: The creation of instances and the overview of all already created instances, which can be searched via filters. When creating an app project, the corresponding start links [Process App - Create](#) and [Process App - Overview](#) are automatically created.

 The role check does not apply to overviews. Basically all users are allowed to open overviews. Create specific overviews for each role [using search queries](#) or restrict user rights [using the role rights option](#).

Using the Overview

In each app, data is created and stored. These data sets, the so-called **instances**, can be searched after saving. It is also possible to use the instances in other apps. PAS design users can freely define which data should be displayed in the **overview model**.

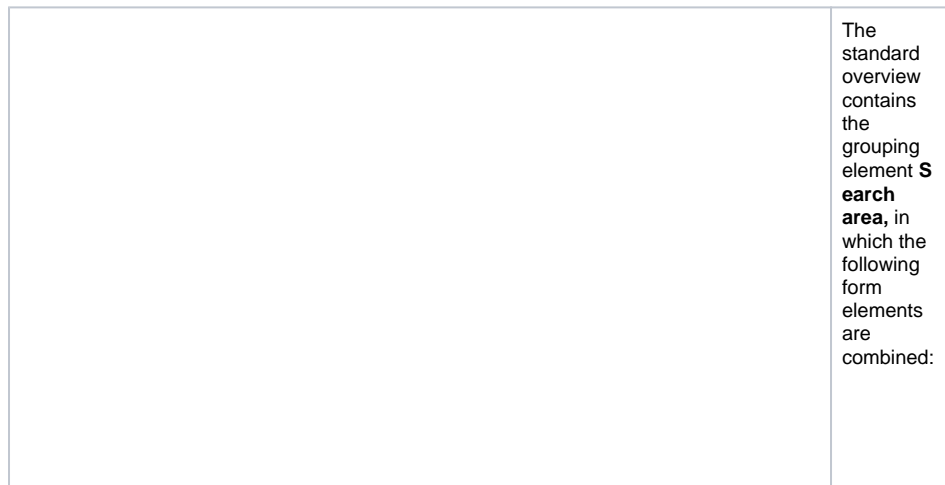
A newly created app project automatically contains the EPC models **Reference model**, **Overview model** and **Initialization model**.



The Overview Form

The overview form consists of two sections:

1. The upper area contains filter fields. Users can use these to search the instances.
2. The lower area contains the [Instance Table](#) in which the saved data from the app is displayed.



On this Page:

- [Using the Overview](#)
 - [The Overview Form](#)
 - [Inserting a Filter](#)
 - [Special Filter Fields](#)
- [Opening an Overview](#)
 - [Opening the Overview Using a Tile](#)
 - [Opening the Overview Using the Start Link "Overview"](#)
 - [Using the Button Go to Overview](#)
- [Searching the Overview](#)
 - [Opening Instances](#)

Related Pages:

- [Configuring Overview Tables](#)
- [Setting Search Filters Using Search Query](#)
- [Using Meta Information](#)
- [Saving and Deleting Instances](#)
- [Creating Instances](#)
- [EPC Elements](#)
 - [Process App - Overview](#)
- [Creating Forms](#)
 - [Configuring Tables](#)
 - [Possible Values: Value and Label](#)
- [Service](#)
 - [Procurement Process](#)

Related Documentation:

- [Support](#)
 - [Troubleshooting BPaaS](#)

Search area

Search your instances or create a new one:

Text Element

NEW

Instances table

Text Element

Page 0 of 0

- The button **New**
- The input field **Text Element**
- The **Instances table**
- A division element, containing the explanatory text **Search your instances or create a new one.**

You can configure these elements to match your app:

- Insert other form fields as filters.
- Use the Edit Side bar [to configure the instance table](#) and define the content you want to display.



You don't want to use the division element **Search your instances...** in your form? You can delete the element - or replace the text with your own heading.

Inserting a Filter

	The input field Text Element in the overview...
	... is a link to the field in Form Step 1 of the Reference model .
	Renaming the field in the overview form...
	... immediately effects the field in the input form - and vice versa.

In most cases you can link a field from the input form to the overview form:



- 

in the navigation bar to search for the form field you want to link.

- Drag the field from the results list into the form.

Some form fields need special configuration if you want to use them as filter fields.

Form Field	Configuration
Date Picker	You can use the meta information meta.createdAt as Field Name in Container of a date picker. When creating a new instance, the date is saved accurate to the millisecond. If you link such a date picker in the overview to use it as filter, the instance table will always be empty. This is because meta.createdAt contains the date accurate to the millisecond - but if you select a date from a date picker, the chosen date always contains the selected date at midnight.
Drop-down Field	<p>You can configure a drop-down field in a way that only specified values are available in the input form, excluding empty input. But if you want to use the drop-down field as a filter in the overview, you will need a drop-down field containing an empty input so that all instances can be displayed. Otherwise, the pre-selected value from the drop-down field will always filter the instance table content.</p> <p>If you want to use a drop-down field without empty input as a filter, you cannot simply link the element from the input form. You will have to create a new drop-down field including an empty Possible Value . To ensure that the correct data appears in the instance table, you need to reference the correct content.</p> <p>When creating the filter field make sure that...</p> <ul style="list-style-type: none"> • ... the drop-down field in the overview has the same name as the drop-down field in the input form. • ... the drop-down field in the overview and the drop-down field in the input form refer to the same Field Name in Container.


Radio Button	<p>You are able to configure a radio button in a way that one of the options is pre-selected. If you link such a radio button in the overview to use it as filter, the instance table will never display all available instances. Instead, the instances are always filtered according to the default setting selected in the radio button.</p> <div>  <p>Use the element Drop-down Field instead of the Radio Button to select a value from a list of options. You can display all instances at any time using a Drop-down Field with an empty Possible Value.</p> </div>
 <p>Find out more about the configuration of overview tables and special features of form elements on page Configuring Overview Tables.</p>	

Opening an Overview

There are various ways to open an overview:

- Using a tile in the cockpit
- Using the element **Process App - Overview**
- Using the button **Go to Overview** in the input form

Opening the Overview Using a Tile

	<p>Using a start tile in the cockpit is the fastest way to open the overview. A list of the available start links is displayed in the sidebar of the cockpit.</p> <p>To create a start tile in the cockpit, drag the required start link Process-App - Overview to the cockpit. A click on the tile starts the process app directly, the overview form is called showing the list of already created instances.</p>
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Opening the Overview Using the Start Link "Overview"

The screenshot shows the 'Edit: ProcessApp' interface. On the left, there is a sidebar with a red header 'Procurement Requests Waiting for Approval' and a 'New Elements' section. The main area contains the following fields:

- Name:** Procurement Requests Waiting for Appi
- Description:** Query lists all instances in step "Checking request"
- Hashtags:** (empty)
- Search Query:** (with a gear icon)
- Role For Link:** head_accounting
- Developer-Options:** (dropdown menu)
- START:** (button highlighted with an orange border)

PAS design users can also call up an app via the **Process App - Overview** element:

- By double-clicking on the element itself.
- By clicking on the **Start** button located in the Edit Side bar of the element.

Using the Button **Go to Overview**

The third way to open the overview is via the corresponding input form.

ACME Procurement Request

Request Number
157163859/814

Creation Date
2019 Oct 21

Currently edited by
irene.adler

Applicant Details

Name
Irene Adler

E-Mail
irene.adler@acme-corp.com



Department
Management

Type of Request
☒ New ☐ Substitute ☐ Other

If "Other", please specify:

Items to order

OrderList

Quantity	Image	Item Name	Color	Price per Unit in :	Total	Overnight
<input type="checkbox"/> 1		Briefcase Modern		\$9.99	\$9.99	<input type="checkbox"/>
<input type="checkbox"/> 1		Crayons, assorted		5.99	5.99	<input type="checkbox"/>

Page 1 of 1

View 1 - 2 of 2

Order Value *
65.98

Go to overview

Save

Submit order

The start link **Process App - Create** is normally used to open the input form so that the user can create a new instance. However, you may want to check whether the data record already exists. In that case, you can switch directly from the input form to the overview form by using the button **Go to Overview**.

Each input form automatically contains a button **Go to Overview**, which can be deleted or renamed by a PAS design user.

The button opens the corresponding overview form and gives you direct access to the list of already created data.

Searching the Overview

Procurement Requests

Filters

Request Number

Creation Date

Name

Department

Create New Request

Request Table

Request Number	Creation Date	Name	Department	Type of Request	Order Value	Confirmation	Status
<input type="checkbox"/> 1567747605404	2019 Sep 06	Eliza Doolittle	Accounting	New	58.90	<i>Order</i>	Showing order su...

To search the overview data, enter a search term in a filter field and confirm with **ENTER**. Alternatively, click on the work area outside the filter field. The data in the table adapts to the search selection made.

You can combine different filter fields to refine the search.

If the filters remain empty, no filtering is applied and the table displays all created data. Users also have a sorting option in the instance table: By clicking on the column name, the contents are sorted in ascending or descending order.

Procurement Requests

Filters

Request Number

Name

higgins

Creation Date

Department

Accounting

Create New Request

Request Table

Request Number	Creation Date	Name	Department	Type of Request	Order Value	Confirmation	Status
<div>No instances found.</div>							

If no instances match the search criteria, the message **No instances found** is displayed.

Example: The ACME Procurement Process

ACME Corp. uses the app **Procurement** to manage its internal demand for office supplies. Employees can use the tile **Create Procurement Request** to submit an order. After saving the data, the request is forwarded to the purchasing department. If the order exceeds a specified budget, the request is first sent to the head of accounting, who must approve it.

The app contains two start tiles:

Create Procurement Request

- Create Procurement Request: Every employee can use this tile to create a new order. The tile opens the input form.



- Procurement Requests Waiting for Approval: While all employees may submit applications, only the head of accounting can approve orders exceeding the budget. Therefore, only the head of accounting has access to this tile.

Procurement Requests

Filters

Request Number

I

Name

Creation Date

Department

Create New Request

Request Table

<input type="checkbox"/>	Request Number	Creation Date	Name	Department	Type of Request	Order Value	Confirmation	Status
<input type="checkbox"/>	156708049422	2019 Aug 29	Irene Adler	IT	New	59.99	<i>Adler</i>	Showing order s...
<input type="checkbox"/>	1567672991535	2019 Sep 05	Irene Adler	Management	New	131.48	<i>Adler</i>	Showing order s...
<input type="checkbox"/>	1567747515470	2019 Sep 06	John Watson	Production	New	32.87	<i>Watson</i>	Showing order s...
<input type="checkbox"/>	1567747605404	2019 Sep 06	Eliza Doolittle	Accounting	New	58.90	<i>Eden</i>	Showing order s...
<input type="checkbox"/>	1567747726242	2019 Sep 06	Henry Higgins	Marketing	New	32.56	<i>Higgins</i>	Showing order s...
<input type="checkbox"/>	1567747836533	2019 Sep 06	David Copperfield	Sales	New	42.00	<i>Copperfield</i>	Showing order s...

Page 1 of 12

View 1 - 12 of 12

The unfiltered overview displays all procurement requests.

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

	Request Number	Creation Date	Name	Department	Type of Request	Order Value	Confirmation	Status
<input type="checkbox"/>	1567747605404	2019 Sep 06	Eliza Doolittle	Accounting	New	58.90	<i>Order</i>	Showing order s...

With the help of the filter fields, employees can search the list of already created procurement requests.

Opening Instances

Users can also open instances out of the instance table. If you click on an instance in the overview table, the instance will be opened in the input form in which the instance was last saved.

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

	Request Number	Creation Date	Name	Department	Type of Request	Order Value	Status
<input type="checkbox"/>	1569223748625	2019 Sep 23	John Watson	Production	New	337.29	Checking request
<input type="checkbox"/>	1571649001635	2019 Oct 21	Irene Adler	Management	New	409.80	Checking request

Eliza Doolittle, ACME's head of accounting, wants to process the procurement requests that are waiting for approval. She clicks on tile [Procurements Requests Waiting for Approval](#) to display the list of all pending requests.

Two orders are waiting to be processed. Eliza clicks on the first line of the instance table to open the corresponding dataset.

ACME Procurement Request

Request Number

1569223748625

Creation Date

2019 Sep 23

Currently edited by

irene.adler

Applicant Details

Name

John Watson

Type of Request

☒ New
 ☐ Substitute
 ☐ Other

E-Mail

john.watson@acme-corp.com

If "Other", please specify:

Department

Production

Items to order

OrderList

Quantity

Image

Item Name

Color

Price per Unit in \$

Total

Overnight

1

Desk Lamp

36.50

36.50

☐

1

Office Chair "Boss"

299.80

299.80

☐

1

Writing Pad, ruled

0.99

0.99

☐

Production

Items to order

OrderList

Quantity

Image

Item Name

Color

Price per Unit in \$

Total

Overnight

1

Desk Lamp

36.50

36.50

☐

1

Office Chair "Boss"

299.80

299.80

☐

1

Writing Pad, ruled

0.99

0.99

☐

Page 1 of 1

View 1 - 3 of 3

Order Value

337.29

Feedback Accounting

Reason for Rejection

Reason for Rejection

Reject Request

Approve Request

John Watson's order is displayed in the App roval form and Eliza can process the order directly.



Caution when deleting process steps out of a (productive) EPC

- Instances, which are situated in this process step can not be opened again after deletion. When trying to open an affected instance an error message will be displayed in the overview. The message contains name and ID of the deleted process step.
- Every function has its own ID in the database. A new function with the same name cannot therefore replace a deleted function.