HCL Domino Volt
Step by Step Tutorial

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Table of Contents

Create the course catalog app from a spreadsheet ................................................................. 3

Create the Request application .................................................................................................. 3
Add image and title to the page .................................................................................................... 5
Add fields for Name and Email .................................................................................................... 6
Add dropdown to select a course .................................................................................................. 6
Populate the dropdown with a service call to the course catalog .................................................. 6
Style your app ................................................................................................................................ 8
Add a Section and fields for selected course information ............................................................ 9
Add a Rule to show Travel Authorization Number field ............................................................... 11
Add service to retrieve selected course information ..................................................................... 11
Add manager summary page ........................................................................................................ 13

Add workflow to the app ............................................................................................................. 15
Add notifications .......................................................................................................................... 15
Set access rights and privileges for workflow stages ..................................................................... 16
Set Stage visibility rules ................................................................................................................ 17

Save, deploy and test the app ....................................................................................................... 17

Update the app so that it keeps track of course registration levels .................................................. 19
Add formula to calculate Seats Left and Update Registration ......................................................... 19
Add Number Registered field to the Course Catalog .................................................................. 19
Update the Retrieve Service to return Capacity and Number Registered ....................................... 20
Add a Service to Update the Number Registered in the Catalog ................................................. 21
Text and rules to let the users know how many seats are left and if the class is full ....................... 22
Hide the Registration Info – Hidden section ............................................................................... 22

Save, Deploy and test the app ....................................................................................................... 23

Use a Table for Course Selection .................................................................................................. 24
Populate the Table with a Service .................................................................................................. 25
Retrieving the selected course from the Table selection ............................................................... 26

Save and Preview the App ............................................................................................................ 27
Create the course catalog app from a spreadsheet

- Create a New Application / From Spreadsheet using coursecatalog.xlsx. Accept all the defaults.

- From the Manage page, click on View Responses for viewing the imported spreadsheet data.
- Customize the view by showing the form in right hand panel. Scroll down and select View form in the right panel in Application viewing options.
- View records by clicking in them.

Create the Request application

- Switch back to Manage page and edit the new Course Catalog app.
• Add a new Form by clicking on the + in the application outline.

![Image of adding a new form]

• Name the new form ‘Request’ and accept Default Layout.
• Rename Sheet1 to ‘Catalog’ by clicking Sheet1 text.
• Drag and drop Request so it is before Catalog.

![Image of renaming and reordering sheets]

• Under Request / Page 1 click on the properties icon ⚙ select the Advanced tab.
• You will see that the width has been set to a dynamic range of 400 to 800 by default with a breakpoint of 700 to collapse the form to a single column.

![Image of editing page properties]
Add image and title to the page

- Add an Image from the Display Items palette to the top of Page 1 in the Request form.
- In the Image properties select Add file and use this URL: https://leapsandbox.hclpnp.com/VoltFiles/HCL_Domino_Volt.svg
- Size the height to 30.

- Add Text from the palette below the Image.
- Enter ‘Training Request App’.
- Highlight the text entered and set the style to Heading 1

- Add a Line from the Display Items palette and place it below the Text.
- Drag the lower right-hand corner across columns so that it spans the width of the page.
- Grab the column handle at the top of the page and set the columns to a similar width of roughly 350 pixels.
Add fields for Name and Email

- Add Single Line Entry field from the Fields palette and name it ‘Name’.
- Edit the properties for Name and set the width to full.
- Click the Duplicate icon on Name.
- Rename the new field to ‘Manager Name’.
- Add Email field from the Fields palette to the right of Name.
- Edit the properties for Email and set the width to full.
- Click the Duplicate icon on Email.
- Rename the new field to ‘Manager Email’.

Add dropdown to select a course

- Add a Drop Down field from the palette. Name it ‘Select a Course’.

Populate the dropdown with a service call to the course catalog

- Edit the dropdown properties and under Options click on Edit.
- Select Use a Service.
- Click Add/Edit Service Configuration.
- Select Or, Select a Service
- Click on Course Catalog / Sheet1 / Search service under Current Application.
• Click on 3. Outputs.
• Map Searched Records / Record Unique Identifier to the Select a Course / Options / Saved Value. Do this by highlighting the two fields and clicking on the connector icon in the middle.
• Map Searched Records / Title to the Select a Course / Options / Displayed Value.
• Click OK when finished.
- Click on the Preview icon in the upper right to test the service call.
- Allow pop-ups in your browser.
- Close the preview window.

Style your app

- Click on the Settings tab on top.
- Select Files on left side and add the font file you downloaded - Gotham-Book.woff2
- Click on the Style tab on the top.
• Under Theme click **Customize**.
• Under General / Fonts / General select Gotham-Book in **Family** dropdown.

![Theme Editor](image)

• Click on the **Forms** tab to go back to the design canvas.
• Add a **Specialized / HTML** Fragment from the palette to the bottom of page.
• Add the following in-line CSS to the HTML Fragment. This will hide the top banner.

```html
<style>
    .lotusBanner
    {
        display: none;
    }
</style>
```

• Enter the above HTML directly into the HTML Fragment.
• Preview again to see the style changes.

**Add a Section and fields for selected course information**

• Add a **Section** item from the palette to the bottom of the page.
• Drag the lower right-hand corner of the Section item across columns so that it spans the width of the page.
• Under Section properties name it ‘Course Information’.
• On the **Advanced** tab of Section properties - Enable dynamic layout and set the breakpoint to 550.
• Add a Single Line Entry field for ‘Course Title’, Currency field for ‘Cost’ and then Date and Time fields to the Section.
• Add a Multi-Line Entry field for ‘Description’ and drag it across columns. Under Properties set the Width to ‘Full Width’
• Add a Single Line Entry field for ‘Instructor’.
• Add an Image to the right of Instructor and set its height to 60.

• Add Single Line Entry field for ‘Location’.
• Add Select One field for ‘Is Travel Required’. Set the choices to ‘Yes’ and ‘No’ in properties. On the Advanced tab set the Choice Layout to horizontal.
• Add a Single Line Entry field for ‘Travel Authorization Number’.
Add a Rule to show Travel Authorization Number field

- Click the Rules icon on Travel Authorization Number.
- Add a Rule to show Travel Authorization Number and make it required when Is Travel Required equals Yes.

Add service to retrieve selected course information

- Edit the Select a Course properties.
- On the Events tab click on onItemChange.
- Click Call a Service and then Add/Edit Service Configuration. Hint: be sure to create a new service configuration. Do not edit the one you created to populate the dropdown.
- Select Course Catalog / Catalog / Retrieve from the list of services under Current Application.
- Click on 2. Inputs and map the Page1 / Select a Course dropdown to Retrieve by Unique Identifier.
• Click 3. Outputs and map: Title, Cost, Date, Time, Location, Description and Instructor to their corresponding fields in the form.
• Map Picture to the F/Image2 item in the form section.
• Click OK.

• Save and preview to test the service configuration settings
Add manager summary page

- Click on the + icon next to Page 1 in the outline.
- Call the new page Manager Summary.

![Outline view](image)

- Add the image, title and line that are on the top of Page 1 to the top of this new page OR go to Page 1 and duplicate them and drag them over. If you take the second approach remember to delete the newly created rows which will be blank.
- Add Text from the palette and place it below the line.
- Enter the following text:

  Your employee:
  Has requested to take:
  The cost:
  Date:
  Location:

- Use the Insert Item dropdown to add the value from the form to the end of each line. When you are done it should look like this.

![Edit Text Properties](image)
• Drag the Text across columns so it spans the width of the page.

• Add Text from the palette and place it below this and enter ‘Travel is not required’.
• Add a Rule to this Text so that it shows when Is Travel Required? equals No.

  Hint: You need to click Show items on all pages to be able to select Is Travel Required?

• Add Text from the palette and place it below this and enter ‘Travel is required and the authorization # is:’.
• Use the Insert Item dropdown to complete it so it says: ‘Travel is required and the authorization # is: {Travel Authorization Number}’.
• Add a rule to this Text so that it shows when Is Travel Required equals Yes.

• Add a Multi-Line Entry field from the palette and place it below this.
• Set the properties so that it displays full width.
• Drag it across columns it so it spans the width of the page.
• Name it ‘Managers Comments’.
• When you are done the Manager the Summary page should look like this.
Add workflow to the app

- Click on the Stages tab.
- Select the Submitted Stage in the Stage outline on the left side of the screen.
- Click the + icon next to Stages and add a new Stage named ‘Approved’.
- Click the + icon again and add a new Stage named ‘Denied’ after Approved.
- Select Submitted Stage and rename the button from Update to ‘Approve’.
- Delete the Cancel button under Submitted. You can do this at the bottom.

- Add a submit button and name it ‘Deny’.
- Set the Next Stage option for Approve to the Approved Stage.
- Set the Next Stage option for Deny to the Denied Stage.

Add notifications

- Select the Start Stage and click the properties icon @ for Submit.
- Under Activities select Send an Email.
- Use the Insert Item dropdown to set the To: field to Manager Email.
- Use Insert Item to set theCc: field to Email.
- Use Insert Item to add ‘{Name} is requesting to attend {Course Title}’ to the subject line.
- Enter the body of the email and use Insert Item to pull values from the form into your text and to add Link to this Form.
• DO NOT SAVE – if messaging is not setup on your server.

Set access rights and privileges for workflow stages

• Click on the Access tab.
• Select 1. Define Roles on the left.
• Click the + icon to add a new Role named ‘Managers’.

• Select Managers under 2. Assign Users and add All Authenticated Users to the Role.
• Select the Submitted stage under 3. Stage Settings / Request and set the Managers role to allow updates.
Set Stage visibility rules

- Click on the Stages tab.
- Select the Submitted Stage.
- Click on the eye icon next to Page 1 in the outline.
- Select the Start Stage and Page 1.
- Set all the fields in the Course Information section to locked. This is done with the lock icon next to the field. Do this for all fields in this section except Is Travel Required and Travel Authorization Number.

Save, deploy and test the app

- Save and go to the Manage page.
• Change the name of the app from course catalog to ‘Training Request’. You can do this inline.
• Click Deploy.

![App Settings](image)

• Launch the Request form, fill it out and submit it.
• Go to View Responses from the Manage page to see the newly created record. It should be in the Submitted stage.
• Click on the record to open it. It should show the Manager Summary page.
• Enter something for Manager Comments and click Approve.

![Request Form](image)

• Go back to View Responses from the Manage page and see that the record is now in the Approved stage.
• You will need to customize the view to Show Stage since meta data is hidden by default.
Update the app so that it keeps track of course registration levels

- Add a Section to the bottom of Page 1, name it ‘Registration Info – Hidden’ and drag it across both columns.
- Add the following Number fields from the palette to the Section – ‘Capacity’, ‘Number Registered’, ‘Seats Left’ and ‘Update Registered’.

Add formula to calculate Seats Left and Update Registration

- Under Seats Left properties on the Formula tab specify a Minus operation so that Capacity – Number Registered = Seats Left

- Under Update Registered properties on the Formula tab specify an Add operation so that Number Registered + 1 = Update Registered.

Add Number Registered field to the Course Catalog

- Select Page 1 in the Catalog form.
• Add a Number field from the palette and place it below Capacity.
• Name it ‘Number Registered’.

Update the Retrieve Service to return Capacity and Number Registered

• Go to the Select a Course dropdown on Page 1 in the Request form.
• Open properties ® and go to the Events tab and select onItemChange.
• Click Add/Edit Service Configuration.
• Select 3. Outputs.
• Map Capacity and Number Registered from the Catalog to the corresponding fields in the new section.
Add a Service to Update the Number Registered in the Catalog

- Click on the Settings tab and select the Request form under Services.
- Click on the button to Add Service Configuration.
- Under Current Application select the Catalog / Submitted / Update service.

- Under 2. Inputs map Select a Course to Retrieve by Unique Identifier.
- Map Update Registered to Update the Number Registered field in the catalog. Caution: select the ‘Update’ function and be careful not to select the ‘Search by’.
• Click OK to Save the Service Configuration
• Go to the Forms tab to go back to the design canvas
• Open the Request form properties.
• Select the Events tab and click on the beforeSave event.
• Click Call a Service and select the Update service you just created.

Text and rules to let the users know how many seats are left and if the class is full

• Add 2 Text items from the palette to the top of the Course Information section. The first one should be ‘Class is full’. The second one ‘Seats Left: {Seats Left}’ where you use the Insert Item dropdown to complete it so that it shows the value of Seats Left.
• Make Class is full red and Seats Left blue.

![Class is full](image)

• Add a rule to the text ‘Class is Full’ so that it shows when Course Title has a value and Seats Left equal 0.

![Rules](image)

• Add a rule to the text ‘Seats Left: {Seats Left}’ so that it shows when Seats Left is greater than 0.

Hide the Registration Info – Hidden section

• On the Stages tab with the Start stage selected – click on the eye icon for the Registration Info – Hidden section so that it has a slash through it.
• Note: It’s often useful to save hiding things until last for debug purposes.

Save, Deploy and test the app

• Click Save and then from the Manage page click Deploy.
• Launch the Request form and submit it number of times for the same course.
• You should see the number of Seats declining and when it reaches 0 should display Class is Full.
Use a Table for Course Selection

- From the Manage page select Export on the Training Request application you created.
- Export with data option Include submission data selected.

- Import the application with data and give it a new name – ‘Training Request with Table’.

- Edit the new application.
• Delete the **Select a Course** dropdown. It will warn you that the dropdown is connected to a service but proceed anyway to delete it.
• Add a **Table** from the palette to the page in the same place. Name the Table ‘Select a Course’.
• Add 4 fields to the Table – **Single Line Entry** named ‘Course’, **Single Line Entry** named ‘Location’, **Date** and **Single Line Entry** named ‘Unique ID’
• Switch back to **Page1**
• Under Table properties on the **Advanced** tab set the column widths to 12 for **Course**, 8 for **Location** and 8 for **Date**. Do not display **Unique ID** by removing it from the **Options** list (click on \( \times \))
• Also, under Table properties on the **Advanced** tab set the **Table Style** to **No Buttons** and set the **Number of rows displayed** to 3 rows.
• Drag the Table across columns so it takes up the width of the page.

![Select a Course Table](image)

**Populate the Table with a Service**

• Under the **Settings** tab click on **Services / Request** and find the **Catalog / Search** service and edit its properties. This is the service that was set up for the dropdown in the first app.
• Click on **3. Output** and map the following fields to fields in the table: **Record Unique Identifier** to **Unique ID**, **Title** to **Course**, **Date** to **Date** and **Location** to **Location**.
• Go to the **Forms** tab and edit the Table properties.
• On the **Events** tab click on the **onShow** event.
• Click on **Call a Service** and select the **Catalog / Search** service.
• Preview the form to see if the Table is populating.
• Note that you can click to column headings to sort. This provides the user with more information to decide which course to register for. For example – select a course for a specific city or when a specific course is offered.

### Retrieving the selected course from the Table selection

- Add a **Single Line Entry** field to the **Registration Info – Hidden** section. Name it ‘Unique ID’.
- Edit the properties for **Unique ID**. On the **Advanced** tab set the **ID** to ‘F_UID’.
- Go to the Table properties on the **Events** tab select **onClick**.
- Enter the following JavaScript:
```javascript
var selected = item.getSelection();
if(selected === null)
    return;

BO.F_UID.setValue(selected.getValue());
```

- Put your cursor in between the two periods on the last line of JavaScript *(after selected and before .getValue()).* Press Shift-Space and navigate to the Unique ID field in the Table and select it. This will pop its ID into the line of JavaScript where your cursor is.
- Note: this JavaScript gets the Unique ID for the Table selection and passes its value to the Unique ID field in the Registration Info – Hidden section.
- Edit the properties of the Unique ID field in the Registration Info – Hidden section.
- From the Events tab select the onItemChange event.
- Click Call a Service and choose the Catalog / Retrieve service.
- Click on Add/Edit Service Configuration.
- Under 2. Inputs – map the Unique ID field to the Retrieve by Unique Identifier in the catalog.
- Click OK and then Preview to test the app.

Save and Preview the App

- Click on Save.
- From the Manage page click on Deploy.
- Launch the Training Request with Table form to test it.
<table>
<thead>
<tr>
<th>Course</th>
<th>Location</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>JavaScript Advanced</td>
<td>Boston</td>
<td>8/1/2020</td>
</tr>
<tr>
<td>Leadership</td>
<td>Boston</td>
<td>5/12/2020</td>
</tr>
<tr>
<td>New Hire Orientation</td>
<td>Boston</td>
<td>5/23/2020</td>
</tr>
</tbody>
</table>

9 seats left out of 15

**Course Title**
JavaScript Advanced

**Cost**
$1,500.00

**Date**
8/1/2020

**Time**
9:00 AM

**Description**
Learn the advanced features of JavaScript in this one day class. The course will focus on functions and callbacks as well as using AJAX commands to integrate with different REST services.

**Instructor**
Marty Lechleider

**Location**
Boston

**Travel Required**
- [ ] Yes
- [ ] No