

---

# Counting Lotus Notes Applications

Thomas Cagley  
(440) 933-8768 – Office  
(440) 668-5717 – Cell  
[tomcagley@davidconsultinggroup.com](mailto:tomcagley@davidconsultinggroup.com)

# Items of Interest

---

- Definitions
- Where are the ILFs
- Subforms
- Twisties
- Views
- Keywords
- Notes Design Synopsis (v4.0 or later)
- Guidelines

# Definitions

---

- Fields
  - ◆ Single unit of information
- Shared Fields
  - ◆ Field definitions shared by multiple forms within a database
- Keyword Fields
  - ◆ Dynamic list of choices from which users can select
- Forms
  - ◆ Document template that provides a structure for entering data
- Subforms
  - ◆ Mini forms that can be included in other forms
  - ◆ Functionality that can be iteratively placed in the application

# More Definitions

---

## ➤ View

- ◆ Dynamic table of contents
- ◆ Columns and rows that present the users with a list of documents showing field data associated with each document

## ➤ Twisties

- ◆ Categorizations of values within a given field or column dynamically generated upon execution

## ➤ Actions and Buttons

- ◆ Procedures and processes that automate tasks within the application
- ◆ Actions can be used in both forms and views (action bar and menu)
- ◆ Buttons can be used only within forms

# And Some More Definitions

---

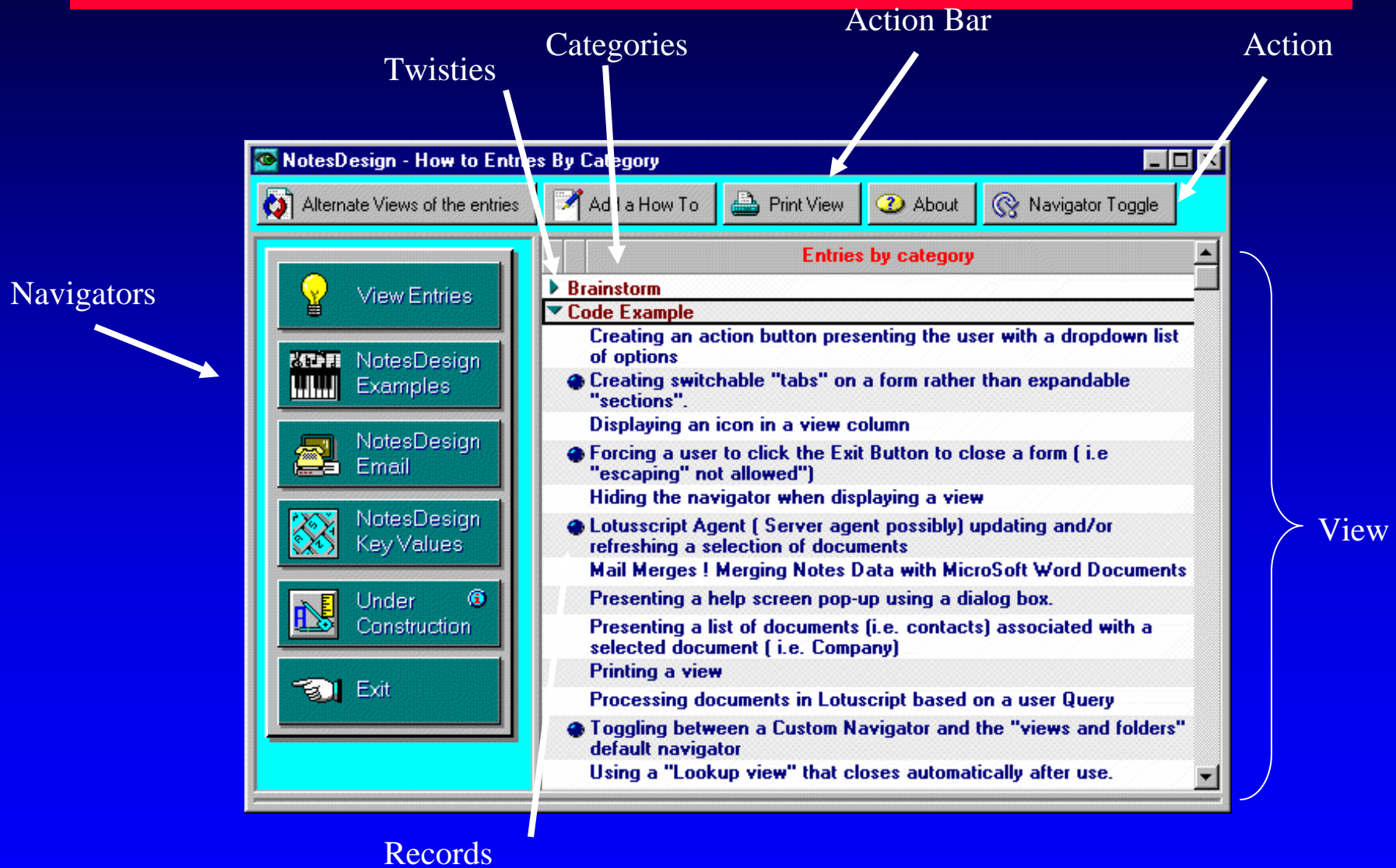
## ➤ Agents

- ◆ Automate database tasks
- ◆ Similar to macros
- ◆ Examples include archiving, sending messages, managing a workflow

## ➤ Navigators

- ◆ Visual tool used to guide users through the application

# Example



# Forms or Where are the ILFs?

---

## ➤ Forms

- ◆ Basic groups of data in Notes
- ◆ Typically control add/change functionality  
(deletes normally from Views unless an action has been created)

### Counting Forms:

- ◆ Make sure data is unique
- ◆ Notes makes it easy to create and display groups of data with minor differences

# Subforms or Forms within Forms

---

- Reflect functionality that is (or was planned to be) repeated throughout the application
- Stored as a unit
- Included in other forms as needed
- When included in a form, a subform inherits all changes to the original subform



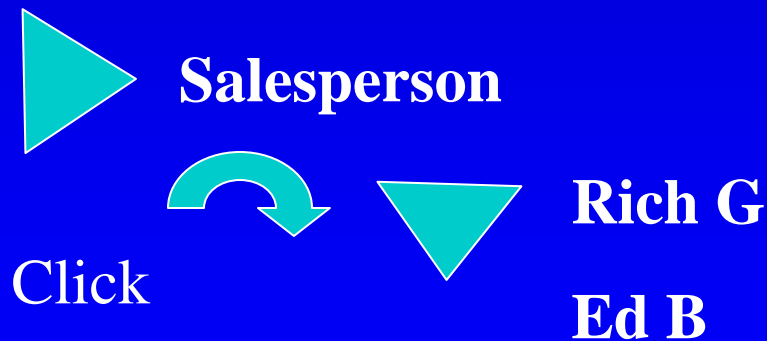
# Twisties and Categorization - Dropdowns in a new form?

When you start the Orders application, the Orders form opens automatically for data entry, ready for the day's first order.

Salesperson  
Dropdown

(GUI combo box)

Notes View implementation with  
'Twisties'



# Views

---

- Lots of different sorts and filters
  - ◆ Notes makes it very easy to give a user his/her own personal organization of data
    - ◆ I use a spreadsheet to make sure the data retrieved is actually different
  - ◆ Pay attention to sources and fields used
- Count only visible field (not hidden)
  - ◆ Views can include hidden field to facilitate sorting and retrieval
- Fields that are computed for display suggest an EO rather than an EQ
  - ◆ Check the Design Synopsis if unsure of whether a field is retrieved or derived
- Views with totals are EOs

# Keywords

---

- Keywords what type of data are they?
  - ◆ Business Data
  - ◆ Reference Data
  - ◆ Code Data

Keywords can fit any of these categories. If the Keyword fits the definition for Code Data, DO NOT COUNT as data or any transactions used to maintain or retrieve the relevant keyword

- Keywords come in three flavors
  - ◆ Checkboxes (hard coded)
  - ◆ Radio buttons (hard coded)
  - ◆ Dialog List (either dynamically generated or from a form)
- Look for a form to verify whether reference file is maintained

# Design Synopsis

---

- Lists all forms and views
- Defines all fields
- Shows all input and view calculations

# Design Synopsis Excerpts . . . .

Database Information:  
Server:  
Path:

## Form Information:

### Form:

Form Alias:  
.....

### Field:

Datatype:  
Help Description:  
Field Type:  
Sign When Mailing/In Section:  
Encryption:  
Update Requires Editor Access:

### Field:

Datatype:  
Help Description:  
Field Type:  
Keyword User Interface:  
Allow Values Not In List:  
Allowable Keywords:

Sign When Mailing/In Section:  
Encryption:  
Update Requires Editor Access:  
Default Value Formula:

**Application Profile**  
ApplicationProfile

**WorkflowObject**

Text  
[Not Assigned]  
Editable  
No  
Disabled  
No

**RoutingMethod**

Keywords  
[Not Assigned]  
Editable  
Standard  
No  
One after the other |  
Serial  
All at Once | Parallel  
No  
Disabled  
No  
"Serial"

Form Name  
and Alias

Field Type

Datatype

Hardcoded  
Keywords

# Design Synopsis Excerpts (continued)

## View Name:

Last Modification:  
Default Database View:  
No Response Hierarchy:  
Categories Initially:  
Unread Marks:  
Refresh Frequency:  
Discard Index:  
View May Be Used By:  
Time Relative Formulae:  
Selection Formula:

1. In-Progress  
Newsletters|InProgress  
s

02/25/98 03:06:06 PM  
Yes  
Disabled  
Expanded  
None  
Automatic  
Never  
All Users  
No  
SELECT Form =  
"Newsletter" & (Status !=  
"Complete");

## Column Number:

Column Title:  
Column Formula:  
Column Width:  
List Separator:  
Hidden:  
Responses Only:  
Icon:  
Number Format:  
Percentage (value \* 100)%:  
Parentheses on Negative Numbers:  
Punctuated at Thousands:  
Time Format:  
Sorting:  
Justification:  
Totals:  
Hide Detail Values:

1  
Status  
Status  
12 Characters

No  
No  
No  
General  
No  
No  
No  
03/13/98 04:38:26 PM  
Ascending  
Left  
None  
No

Source for View

Column Name and Formula

User Visible

Sorted, Categorized or Both

Totaled

# Guidelines for Using the Design Synopsis - Forms

---

- Guideline for Using the Synopsis - Forms. Group logically related forms into an ILF with the RETs being the individual forms
  - ◆ Make sure the forms are not duplicates
- Count an EQ (view) for each unique form and EIs for add and probably change if the individual RETs are not closely related
- Count an EI delete with the form only if the form has a button or entry on the action bar for delete; otherwise, count the delete with the view
- For the EIs, do **not** count fields as DETs if the Field Type = computed for display or computed on input
- Count as a single ILF with one RET “Keywords” if any field datatype = Keywords (only for Keywords that are NOT CODE DATA)
  - ◆ Count a single EI add and change for the Keyword ILF

# Guidelines for Using the Design Synopsis – Forms (2)

---

- If there is at least one field with a value in Help Description, count for the application an EQ for Field Level Help
- There may possibly be an EQ for Screen Level Help (look for an “About Page, Home Page, or something of this nature)
- Count an EIF, low complexity, for Lotus Notes Name and Address Book if the application uses it (Look for something like @Name[CN] in the Formula)
- Count a DET for any error or confirmation messages (look for success or failure messages in Input Validation Formula)
- Do **not** count technical items such as HTTP variables
- Fields beginning with ‘tmp’ are typically temporary buckets for holding data, look for a non-temporary version of the field



# Guidelines for Using the Design Synopsis - Views

---

## Views

- Make sure the views are not duplicates; they tend to repeat (ex. may just be sorted differently)
  - ◆ Compare the fields in similar views!
- Do not count fields that are hidden (Hidden = Yes)
- If Sorting indicates “Categorized”, (Twisties) count any additional DETs a part of the original EQ
  - ◆ (This appears as a ▾ on the screen, indicating that the user can click on it for a list of values). Remember to count the EQ once not as many small EQs.

# Guidelines for Using the Design Synopsis - Miscellaneous

---

## Miscellaneous

- Verify that what is on the Synopsis is being used (some functions may appear in the synopsis but may not be “turned on”)
- Do **not** count attach, cut, paste, etc. capabilities as these are functions of Lotus Notes, not the application being counted

# Parting Comments?

---

- Notes is very flexible, with many built in tools
  - ◆ Make sure you are counting the application not Lotus Notes!
- Care should be given to correctly establish data entities, thus to ensure correct counting of ILFs; do not be afraid to use the design synopsis

Questions?

Comments?