Cadenza for the Newton v1.6– User Guide

Contents

1. The Cadenza control database

1.1 Introduction

The Cadenza control database is the administrative heart of Cadenza. In multi-user environments, administrators and users will benefit from sharing the same Cadenza control database since, instead of being distributed across large numbers of desktop machines, all the information that controls and records the operation of Cadenza will be stored in one place.

The Cadenza control database also serves as the central repository for PDA backups, application packages and other files. In this way, the administration of large numbers of PDAs is greatly simplified bringing tangible benefits to the whole organisation.

NOTE: Every form in the Cadenza control database has a Support Request button on the Action bar. Clicking this button will prompt you for the text of your support request and then mail your text and the entire form to the "Send To" – by default this is "support@commontime.com"

1.2 Profiles

For each PDA type supported by Cadenza, there is a default profile that can be tailored to suit organisation-wide requirements. Each time a new user is added to the control database, by simply choosing the appropriate PDA Type, the default settings for that PDA are copied across into the new user profile. Further modifications can be applied to customise individual user profiles if necessary.

To view and/or manage the profiles in the Cadenza control database ("cadenza.nsf" in the directory "cadenza"), add it to the Lotus Notes workspace and open it.

Select the view "Profiles".

To create a new profile, click the Create button. In the resulting dialogue box, select "Profile" and click OK.

A Profile form has the following fields and sections: -

Profile for:
Enter the user's distinguished Notes name in abbreviated format
e.g. John Smith/AcmeCorp or select it from the appropriate address book.

PDA Type:
Select the appropriate PDA type. (Note: Choosing an alternate PDA type sets the whole form to ithe default values for that PDA type.)

Configuration:
Uncheck any boxes that are not required. Please note that this release supports Mail for WinCE and Mail, Names, Calendar, Backup, Restore, Installation and Book Library for the Newton.

Logging Level:
Unless this is set to "None", Cadenza will log summary ("Terse"), detailed ("Verbose") or highly detailed ("Debug") information about each Cadenza session that this user performs.

Dial Back and Call Schedule:
These have no function at the moment and are reserved for future use.

Mail Logo:
Select the stationery type to be used for all Notes mail generated and sent from this user's PDA.

Mail Font:

Determines the font that will be used for all Cadenza (Lotus Notes) mail generated and sent from this user's PDA. Press Alt + Enter (or single right mouse click and select Text Properties). Highlight all of the text "This is how the text will appear" and select the font to be used.

Mail Exchange:
Max mail Length:
This determines the point at which Notes mail messages will be truncated when being transferred to the PDA. The default value is 8000 characters. The maximum allowable value is 15000.
NOTE: if the selected PDA type is Newton and Newton Press is installed on the Cadenza server machine, the full text of all mail items longer than the Max mail Length will be automatically converted into a Newton book. This may be Detached from the truncated mail message.

All other Mail Exchange fields:
These control how the various fields in a Lotus Notes mail memo are mapped to the PDA's In/Out box and vice versa. You are advised not to change any of these settings as doing so may cause Cadenza Mail to malfunction.

Name and Address:
Custom Name and Address Book:
This allows the Names Import/Export and Synchronise functions in Cadenza Connect Utilities to be extended to work with any suitable Lotus Notes database (e.g. a customer or contact management database) even if it not based on a Lotus Notes address book design.

People:
This section controls the field mapping for Person documents in all Notes Public Address Books and Notes 4.5 Personal Address Books.

Business Cards:
This section controls the field mapping for all documents in Notes 4.6 Personal Address Books.

Companies:
This section controls the field mapping for Company documents in Notes 4.5 Personal Address Books

Calendar Entry Options:
Hide new Calendar Entries from public viewing:
This sets the default behaviour for a Notes Meeting if the meeting's "Notes Options" have not been set. It is overridden by the equivalent setting in the "Notes Options" for the meeting (if set and saved).

Remove Invitations from my Inbox after I respond to them:
Removes a meeting invitation message from the Lotus Notes Inbox after you have responded to it.

These two settings only affect calendar entries/responses generated on the Newton. They do not need to be the same as their counterparts in the user's Calendar Profile in Lotus Notes. In other words, the Notes Calendar profile controls what happens when entries are generated using Lotus Notes. The settings in the user's Profile in the Cadenza Control database determine what happens for entries that are generated on the Newton.

If you have made changes to the Profile, you should now Save the Profile and Close the form.

1.3 Fields and Formulae

Field mapping information is presented in profiles in 3 columns – Notes From, PDA and Notes To. As the names suggest, the Notes From column contains the field (or formula) to be mapped to the corresponding field in the PDA column when moving data from Notes to the PDA. The Notes To column defines the mapping to be used when moving data from the PDA to Lotus Notes.

Where a simple field is used in either of the Notes columns, it is specified by its name. A Lotus Notes formula can also be used. All formulas must have a name in the format "Formula_<name>" where <name> is a unique, user defined name for the formula. Please note, formula names are case sensitive.

As an example of why different field mapping is sometimes required dependent on the direction of the data transfer, consider the following: -

A Newton only stores one First Name for a person whereas Lotus Notes allows you to store many. When Importing a name from Lotus Notes to the Newton, a formula ("Formula_GetFirstName") is used to extract the first element of the FirstName field in the Lotus Notes document. When Synchronising a name from the Newton to Lotus Notes, a different formula is used ("Formula_AddFirstName"). This formula compares the Name.First field on the Newton with the list of first names in the Lotus Notes document. Then, if Name.First name already exists in the list of first names, it is moved to the head of the list or, if it does not already exist in the list, it is added at the head of the list.

Sometimes it is not necessary to make an entry in all 3 columns. In the case of Newton phones numbers, it is necessary to map both the fields WorkPhone and Phone to the same Lotus Notes field ("OfficePhoneNumber"). This is achieved as follows: -

Notes From	PDA	Notes To
OfficePhoneNumber	WorkPhone	Formula_AddWorkPhone
	Phone	Formula_AddWorkPhone

IMPORTANT: A line with an empty "Notes From" element must be at the end of the list.

To create or edit a formula, go to the Fields and Formulae view. Note the Mapping Area checkboxes – these categorise the formulae by the application areas in which they are intended for use. Setting them correctly will make it easier for you when amending a profile since the pop-up list of available formulae uses these categories.

IMPORTANT: A formula must return a value. For example, if you are using a formula solely to set the contents of a field, you must append a null string to the end of the formula. The formula Formula_AddCellPhone illustrates the point: -

Field CellPhoneNumber := @trim(@unique(CdzTempValue:CellPhoneNumber));""

NOTE: Notice the use of CdzTempValue in this Notes To formula. For each field in the PDA column, the special field name CdzTempValue refers to the temporary storage area containing the data transmitted by the PDA from that field.

There are two special formulas: -

Formula_NULL: this is used solely as a placeholder since the NoteTo column is not allowed to be empty. It has no operational effect.

$$QuerySave: can only be used in the PDA column. This causes the associated formula in the Notes To column to be executed after all other data for the current document has been processed. There is no corresponding entry in the Notes From column.

NOTE: Formulas are compiled and loaded when the Cadenza server is started. If you have created or changed a formula, remember to stop and restart the Cadenza server.

NOTE: formula names are case sensitive

NOTE: when using a Custom address book, the "Form" field must be defined explicitly. For example:-

Notes From	PDA	Notes To
Formula_GetForm	Form	Formula_SetForm

where, if the forms for a person and a company in the custom address book are respectively "Contact" and "Customer",

Formula_GetForm would be   @if(Form = "Contact"; "Person"; "Company")
and Formula_SetForm would be   FIELD Form := @if(CdzTempValue = "Person"; "Contact"; "Customer"); ""

1.4 Logs

Each time the Cadenza server is started, an Application log is created. This can be very useful in troubleshooting. If submitting a Support Request to CommonTime, please include the relevant Application Log.

Several levels of user session logging are also available dependent on the setting of the Logging Level in each user's profile. The options available are: -
None: no session log information will be recorded
Terse: minimal session log information will be recorded
Verbose: detailed session log information will be recorded
Debug: highly detailed session log information will be recorded

Logs can be found in the Admin view in the Cadenza control database.

If you experience a problem using Cadenza, it will help us to help you if you can reproduce the problem after having set your Logging Level to Debug and then mail the Session log to CommonTime using the Support Request button.

1.5 Packages and Books

Both PDA application packages (executables) and Newton books can be created and stored in the Cadenza control database. They can also be mailed in from a PDA using Cadenza Mail.

For further information about creating, uploading and downloading packages and books, please see Using Cadenza with packages and Newton books below.

2. Cadenza Mail

IMPORTANT: Deleting a mail message on your PDA will not cause that message to be deleted in the Lotus Notes mail file (nor, indeed, vice versa). This is intentional since space limitations on the PDA will often oblige you to delete mail that you might wish to retain in your Lotus Notes mail file.

2.1 Setting Cadenza Mail Preferences

Cadenza Mail is used not only for sending and receiving Lotus Notes mail but also for uploading, browsing and downloading Books and Packages to the Cadenza control database as well as sending and receiving Backups.

The Cadenza Mail Preferences control the behaviour of all Cadenza Mail functions apart from Backup (see Sending and Receiving Cadenza Backups).

To set them, go to the PDA's In Box. Tap the "i" and choose Cadenza Mail Prefs.

When Connecting:
"Browse": builds a view of message header information (Subject, Sender, Date/Time) allowing you to manually select which items to download.
"Download": downloads all the messages without requiring you to select items from the view.
NOTE: if "When Connecting" is set to "Download", only the text of message is downloaded. Attachments (e.g. files attached to mail items and books/packages from their respective libraries) are only ever downloaded when you actually Detach them from a previously downloaded message.

On connection:
Send: Whenever you Receive Cadenza mail, any Cadenza mail in the Out Box will be sent automatically.

Receive: Whenever you Send Cadenza mail, any matching mail (Lotus Notes mail that matches the Cadenza Prefs including the Filter if selected) will be retrieved automatically.

Select how to retrieve mail:
Unread: Check this to browse/download unread mail from the Inbox folder in your Lotus Notes mail file.

Read: Check this to browse/download read mail from the Inbox folder your Lotus Notes mail file.

Sent: Check this to browse/download sent mail from the Sent view in your Lotus Notes mail file.

Use filter: Activates the mail filter (see Filter below)

When Receiving:
Choosing "Specify Type" will prompt you each time you use Receive - Cadenza Mail to find out whether you want to browse mail or packages or books. If you choose anything other than "Specify Type" and subsequently want to browse the Book or Package Libraries, you will need to change your Cadenza Mail Prefs before using Receive - Cadenza Mail.

The remaining checkboxes are self-explanatory.

Filter: When activated by the "Use filter when retrieving mail" checkbox, further refines the selection of mail to be browsed or downloaded.
"Collect mail this is": include mail that satisfies the other criteria in the Filter dialogue.
"Skip mail this is": exclude mail that satisfies the other criteria in the Filter dialogue.

The remaining checkboxes are self-explanatory.

Once you have selected your preferred settings, close the Cadenza Mail Preferences slip.

2.2 Receiving Cadenza mail

NOTE: If you have installed Cadenza as "A single user connecting via serial cable" (i.e. in "User" mode), Cadenza uses your Lotus Notes Location record to determine the location of your mail file. To work with the mail file on your mail server, check that your Lotus Notes Location record shows the correct "Ports to use" and "Home/mail server", that it has "On server" as the "Mail File Location" and that the path of the mail file is correctly specified in the "Mail file" field. If you have a local replica of your mail file and you want Cadenza to work with this replica, use a Lotus Notes Location record that has "Local" as the Mail File Location and make sure that the path of the mail file is correctly specified in the "Mail file" field.

NOTE: When using Cadenza in "UserServer" mode (i.e. multi-user mode on a Notes client), Cadenza will use the address book on the mail server specified in the current Lotus Notes location record to locate each user's mail file and authenticate them using their HTTP password.

NOTE: When using Cadenza in "Server" mode (i.e. multi-user mode on a Domino server), Cadenza will use the local address book to locate each user's mail file and authenticate them using their HTTP password.

Go to the PDA's In Box. Tap the Receive button, then tap Cadenza Mail.

Check that the "Connect from" information is correct and select the appropriate connection option with the "Using" picker.

Tap "Connect".

Unless you have deselected them in Cadenza Mail Prefs, various status dialog boxes will be displayed whilst Cadenza connects to your Lotus Notes or Domino machine and processes your mailbox.

If you have chosen "Browse" as the "When Connecting" option in Cadenza Mail Prefs, headers for each item of matching mail will now appear in your In Box; each item has the status "Remote".

NOTE: "Remote" mail items (which are just mail headers) are removed from the InBox once you have closed your Cadenza Mail connection and the In/Out Box.

Tapping any mail item downloads that item to the PDA and changes its status to "Read".
If you wish to download several items at once, select them by tapping the selection box in the left margin and then tap Receive - Cadenza Mail.

If you have chosen "Download" as the "When Connecting" option in Cadenza Mail Prefs, all matching mail will be downloaded. The status of each item will be "New" until it has been opened whereupon it will change to "Read".

In either case, the process of downloading a mail item updates the unread mark in your Lotus Notes mail file provided that it was not open in Lotus Notes at the time.

TIP: Cadenza looks for "read" and "unread" mail in the Inbox folder and "sent" mail in the Sent view of your Lotus Notes mail file. You will reduce waiting time when browsing "read" and "sent" mail by keeping the number of mail items in the Inbox folder and Sent view to a minimum. If you wish to retain previously sent or received mail items in your Lotus Notes mail file but don't need to access them from your PDA, create folders in your Lotus Notes mail file and move all non-essential items into these folders. Remember, deleting a mail message on your PDA will not delete it in your Lotus Notes mail file.

NOTE: the Max mail Length field in your user profile in the Cadenza control database determines the point at which mail items will be truncated when being transferred to the PDA. If you use a Newton and have installed Newton Press on the Cadenza server PC, Cadenza will automatically convert the whole document into a Newton book and attach it to the truncated mail message as a file attachment.

Where a mail item has one or more file attachments, an asterisk is displayed in the mail header information and the body of the message contains a "[Remote Attachments]" section showing the name and size of each attached file.

Attachments are not automatically downloaded with the mail. To download an attachment, open the mail item, tap the Tag button (immediately to the right of the Receive button) and tap Detach.

If there is more than one attachment, select the one you want to download then tap Detach.

If the attachment is a package or a Newton book, it will be downloaded. If Newton Press is installed and the attachment is one of the file types supported by Newton Press (i.e. most popular types of text & graphic file formats), it will be converted into a Newton book and downloaded. The downloaded file(s) will be placed in Extras.

2.3 Forwarding and Replying to Cadenza mail

The Tag button also provides Reply, Reply with History and Forward mail options which function in the same way as their Lotus Notes counterparts.
NOTE: When using Reply, Reply with History or Forward, your reply will remain in the Out Box with the status "Pending" until and unless you use the Send button to Mail it whereupon the status will change to "Ready".

2.4 Responding to meeting invitations

To respond to a Lotus Notes meeting invitation, select or open it in the In Box and then tap the Tag button. You now have the full range of Lotus Notes meeting options (Accept, Decline, Delegate, Propose Alternate). These function in the same way as their Lotus Notes counterparts.

NOTE: your response will remain in the Out Box with the status "Pending" until and unless you use the Send button to Mail it whereupon the status will change to "Ready".

NOTE: if you have checked the "Remove invitations from my Inbox when I respond to them" option in the Calendar Entry Options section in your profile in the Cadenza control database, the invitation will be removed from your Lotus Notes Inbox when your response is processed by the Cadenza server. It will not however be removed from your PDA's Inbox since mail deletions are never replicated between the PDA's In/Out Box and your Lotus Notes mail file. If you need to change your response at a later date, you can respond again using the same meeting invitation in your Inbox.

TIP: file meeting invitations in a "meetings" folder in your In Box until the meeting date has passed, then delete them.

TIP: until you Accept a meeting invitation, the meeting itself will not normally appear in your Lotus Notes calendar view and it will not, therefore, get synchronised to the PDA. In any connection session, always send and receive Cadenza mail before using Cadenza Connect to synchronise your calendar. In this way, any meeting invitation responses that were in your PDA's Out Box should already have been processed into your Lotus Notes calendar by the time you synchronise it. The meeting (assuming you Accepted it) will then synchronise to your PDA.

2.5 Creating and Sending Cadenza mail

Cadenza mail is created in the same way as any other Newton mail. Whatever item you want to mail, simply tap its Routing button, tap Mail and, in the mail slip, select Cadenza Mail using the picker next to the postage stamp. Complete the "To", "cc" and "bcc" fields as normal.

If you use "Other Names", make sure that any names you select have appropriate addresses. Similarly, if you use "Other Addresses", be sure to provide the full email address, for example: John Smith @ AcmeCorp (or, perhaps, jsmith@acmecorp.com if your Lotus Notes network supports Internet mail). Where possible, incomplete mail address will be resolved by the Notes mail router in the normal manner by reference to server held address books.

Use the Options button to set Lotus Notes mail delivery options.

Finally, tap the Mail button and, if prompted, select Now to send immediately or Later to hold the message in the Out Box for later transmission.

NOTE: The Out Box contains one item, "Backup", that cannot be deleted. If you don't want to see this item in "Unfiled", file it in a suitable folder. Cadenza Backup in discussed in the next section.

2.6 Sending and receiving Cadenza Backups

Backup Preferences are available by tapping the "i" in the In Box and tapping Backup Prefs.

NOTE: The When Connecting option defaults to "Download" since the summary information about the Backup needs to have been downloaded to the Newton before you can Detach a backed up item from it. Using "Download" as the When Connecting option does not in itself download any Backups – it just downloads summary information about the items contained in the Backup.

To send a Backup, go to the Out Box and tap Send – Backup. Cadenza will then connect and display the Backup Selection picker. Select those items that you wish to back up and tap Backup
The Backup is stored in the Cadenza control database as a response to your profile document.

To restore a Backup, go to the In Box and tap Receive – Backup. You will then receive a list of all your Backups that are currently stored in the Cadenza control database. Opening a Backup will show you the contents of that backup under the heading [Remote Attachments].
Choose the particular Backup from which you want to perform a restore, open it and tap the Tag button and then Detach.
Select the item that you want to restore and tap Detach

WARNING: Detaching a soup from a Backup replaces the existing soup of the same name on your Newton.

NOTE: When you use Cadenza to synchronise Names, Dates and Tasks, Cadenza creates "Sync" soups in which it stores synchronisation information for each of these applications. The soups are named Names Sync, Dates Sync and Tasks Sync respectively. Each of these Sync soups is automatically backed up and restored with its corresponding application soup. This applies whether you use Cadenza Backup or the Backup facility in Newton Connection Utilities.

2.7 Using Cadenza with Newton Books and Packages

The Cadenza control database is the container for remote libraries of Newton Packages and Books. These libraries are particularly useful in an environment where the same Cadenza control database is shared between multiple PDA users since it provides a central point of administrative control in which the latest versions of software packages and books can be held for download and installation by PDA users.

Creating entries in the Remote Book Library.
This can be done in two ways – by creating an entry in the Cadenza control database and by "mailing" a book from a PDA.

To create a new entry in the Cadenza control database, open the database and select the Books view. From the Lotus Notes menu, select Create – Book. On the form, enter Name, Version, PDA Type and Description information as appropriate then, with the cursor in the Attachments field, use File – Attach to attach one or more Newton books to this library entry.

To mail a Book from a Newton to the Remote Book Library, tap the Book on the Newton and hold the pen on it until it "squeaks". Then tap the Router button (the envelope at the foot of the screen) and select Mail. Select Cadenza Mail from the mail picker (next to the postage stamp) and use the To picker to select Remote Book Library. Optionally, use the Description and Notes buttons to add information to these fields. Finally, tap the Mail button to send the book to the Remote Book Library.

Downloading entries from the Remote Book Library.
Using the "i" button in the Newton In Box, check that the When Connecting option in your Cadenza Mail Prefs is set to "Specify Type" or "Browse Books".
Tap Receive and Cadenza Mail.
After you have connected (and, where relevant, selected Browse "Books"), a list of all the entries in the Remote Book Library will be downloaded to the In Box. To download a library entry, open the desired entry, tap the Tag button and then tap Detach. Select a book from the list and tap Detach.

The Remote Package Library works in exactly the same way as the Remote Book Library. In fact, a Book is just one type of Newton Package. Cadenza allows you to store them in different libraries for convenience purposes. Whether or not a particular user has access to the Book library and/or the Package Library is controlled by the Configuration settings in the user's profile in the Cadenza control database.

NOTE: If you attempt to download an application package that already exists on your Newton (or has the same name as one already on your Newton), the item will not be installed and you will get an error message to this effect. Make sure that you delete an item from your Newton before attempting to download one of the same name.

3. Cadenza Connect Utilities

3.1 General

Cadenza mail deals with mail, backups, meeting invitations and responses, packages and books. Cadenza Connect deals with the Names, Dates and ToDo Tasks applications. In a future release, Cadenza Connect will also provide the Database Browsing/Forms Download functions.

All access to Lotus Notes databases is governed by normal Notes security. If you attempt to perform an operation for which you do not have sufficient access rights, the message "You are not authorised to perform that operation" will be displayed.

To use Cadenza Connect, tap the Cadenza Connect icon (it can be found in Extras).

Check that the "Connect from" information is correct and select the appropriate connection option from the "Using" picker.

Now tap "Connect".

A series of status slips will appear and, when connected, the Cadenza Connect Utilities slip will display a number of icons. The user's profile (in the Cadenza control database) controls which options are available and, therefore, which icons are displayed.

3.2 Import Names

Tap the Import Names icon and the Import Names slip appears.

Use the Server picker to select either "Local" or the appropriate server. When connected by a serial cable to your Lotus Notes client, "Local" means the Lotus Notes desktop machine. When connected by TCP/IP connection, "Local" means the Lotus Notes server whose IP address is stored in the Internet Setup connection record that you selected in the Using picker when making the connection.

A few moments after selecting the Server, the From picker will display the first entry in a list of all the address books currently available to you. The contents and sequence of the list are controlled by the NAMES= statement in the NOTES.INI file on the relevant machine. If your profile includes a Custom Name and Address book, this will also appear in the list.
Use the From picker to select the appropriate address book.

The View picker will allow you to choose a view option from those that are appropriate to the particular address book (e.g. Business Cards or Companies and/or Names).
Select the desired option using the View picker.

Tap the Import picker. After a short pause, the first screenful of names and/or companies from the relevant Lotus Notes address book will be displayed. Use the letter tabs to navigate to the desired entries. Select a Name by ticking the box in the left margin. If you wish to select all the entries, use the All button. Once you have completed your selections, tap the X to close the slip.

IMPORTANT: If you leave the "Mark imported entries as synchronised" box checked, then all the selected entries will be marked as "Cadenza synchronised" and any subsequent changes, including deletions, to these imported entries will be replicated (access rights permitting) when you use Synchronise Names.
To inhibit the replication of changes and deletions for the entries you are about to Import, uncheck the "Mark imported entries as synchronised" box.

Tap the Transfer button to transfer the selected entries to the Names soup on your Newton.

3.3 Export Names

Tap the Export Names icon and the Export Names slip appears.

Use the Server picker to select either "Local" or the appropriate server. When connected by a serial cable to your Lotus Notes client, "Local" means the Lotus Notes desktop machine. When connected by TCP/IP connection, "Local" means the Lotus Notes server whose IP address is stored in the Internet Setup connection record that you selected in the Using picker when making the connection.

A few moments after selecting the Server, the To picker will display the first entry in a list of all the address books currently available to you. The contents and sequence of the list are controlled by the

NAMES= statement in the NOTES.INI file on the relevant machine. If your profile includes a Custom Name and Address book, this will also appear in the list.
Use the To picker to select the appropriate address book.

Tap the Export picker. The first screenful of entries from the Newton's Names soup are displayed. Use the letter tabs to navigate to the desired names and select them by ticking the box in the left margin. Once you have completed your selections, tap the X to close the slip.

IMPORTANT: If you leave the "Mark exported entries as synchronised" box checked, then all the selected entries will be marked as "Cadenza synchronised" and any subsequent changes, including deletions, to these exported entries will be replicated (access rights permitting) when you use Synchronise Names.
To inhibit the replication of changes and deletions for the entries you are about to Export, uncheck the "Mark imported entries as synchronised" box.

Tap the Transfer button to transfer the selected entries to the selected Lotus Notes address book.

3.4 Free Time Search

Tap the Free Time Search icon and the Free Time Search slip appears.

Use the pickers to select a date range and duration (in hours:minutes) for the search. Tap the Invitees picker to display the Cadenza Names slip. Use the Server picker to select the appropriate server. Use the From picker to choose the appropriate address book; then select the required names.

Close the Cadenza Names slip by tapping the X and then tap the Find Free Time button.

The Free Time Results slip is now displayed. If you select a date/time in the list and tap the New Meeting button, this will take you directly into the creation of a new meeting (including all the Invitees) on that date in Dates.

3.5 Synchronise

The Synchronise function optionally synchronises Names, ToDo Tasks and Dates.

Tap the Synchronise icon and the Synchronise slip appears. The On Conflict picker allows you to decide who wins in the event of a replication conflict. The default is "Latest Wins". You may also choose "Newton Wins" or "Server Wins".

Uncheck any applications that you do not want to synchronise in this session.

Use the Dates picker to set the range of dates to be synchronised. The date range applies to both ToDo Tasks and Dates.

Tap the Synchronise button

NOTE: "Latest Wins" means that the most recent update at either end is the one that will prevail. Cadenza calculates a time offset between the Newton and the machine it is connected to. It takes account of this offset when comparing the modifications times at each end in order to determine which modification time is the later. If both ends have changed and both ends have the same modification time (to within 1 minute), this is considered to be a tie and the Newton wins by default. An exception to this rule is ToDo Tasks – please read the Synchronising ToDo Tasks section below for more information.

IMPORTANT: Cadenza stores synchronisation information in "Sync" soups – one for each of Names, ToDo Tasks and Dates. After you have performed your first Synchronisation, these Sync soups can be seen in the Storage folder in Extras. If a Sync soup is deleted, Cadenza will no longer know, for example in Names, the Lotus Notes address book that each Name synchronises with and, indeed, when any of the Newton data was last synchronised.

TIP: Make regular backups of all of your soups. The backup process will automatically backup and restore each Sync soup with its parent soup (see Sending and Receiving Cadenza Backups).

TIP: Manage each Sync soup and its parent as a pair i.e. keep them together (either both on Internal or both on the same card) and if you delete one, then delete the other.

The following sections provide information and advise on using the Synchronise function for Names, ToDo Tasks and Dates.

3.5.1 Synchronising Names

The field mapping is controlled by the Name and Address settings in the user's profile in the Cadenza control database.

Only those entries which a) have previously been imported from or exported to an address book in Lotus Notes and b) are marked "Cadenza synchronised" will be synchronised when you use Synchronise Names. Each such entry will automatically synchronise with the address book that it was last imported from or exported to.

New entries: New entries, either in Lotus Notes or on the Newton, are not automatically replicated – they must be imported or exported first. This is deliberate since, in this way, the Newton user is in control of the Names on their Newton and they will not suddenly get deluged with hundreds of new names that have been entered by some other person into the corporate address book!

Conflicts: Conflicts are governed by the setting of the "On Conflict" picker in the Synchronise slip. In the event of a tie, the Newton wins.

Deletions: If you delete an entry from Names and the entry is marked as "Cadenza synchronised", it will be deleted from the last Lotus Notes address book that it was imported from or exported to (provided, of course, that your access rights to that database allow you to delete). Similarly, a deletion from a Lotus Notes address book will cause that entry to be deleted from the Newton if the entry is marked as "Cadenza synchronised" and was last imported from or exported to that Lotus Notes address book.

TIP: When you make a new entry either in a Lotus Notes address book or in your Newton Names and you want it to synchronise, remember to import it or export it respectively.

You can remove the "Cadenza synchronised" status of any entry in Names by opening it, tapping "Cadenza synchronised" and then unchecking the "Auto-synchronise with Cadenza" box.
If you subsequently want to re-instate the "Cadenza synchronised" status, you must import or export that name again with the "Mark imported (or exported) entries as synchronised" box checked.

Phones numbers are worthy of special mention since the Newton treats anything in brackets (braces) as the area code and discards anything that precedes the opening bracket (brace).
For example, if a phone number in Lotus Notes is stored as "44 (234) 456 7890", when imported to the Newton, the "44" will be discarded, the Newton area code will be "234" and the Newton number will be "456 7890".
With the default field mapping this means that, when Names are synchronised, the Newton entry (i.e. "234 456 7890" without the preceding "44") will be appended to the list of phone numbers in Lotus Notes since it is not the same as the number in Lotus Notes.
This anomaly occurs as a result of the way in which the Newton parses phone numbers. If necessary, you can modify the relevant field mapping formulas in the Cadenza control database to suit your circumstances.

3.5.2 Synchronising ToDo Tasks

The field mapping for ToDo Tasks is not accessible and cannot therefore be changed.

Repeated ToDo tasks on the Newton are not synchronised to Lotus Notes as Lotus Notes does not support them.

All other Newton ToDo Tasks are synchronised with the ToDo list in the user's mail file and vice versa.

Dates: In Lotus Notes, ToDos optionally have Start and Due Dates and they are sorted for display by Due Date. If there is no Due Date, they are treated as "Current". The Newton has a Date and a Reminder period (in days) from which it works out the equivalent of a start date. Newton ToDo Tasks are sorted for display by start date i.e. Date less any Reminder days.
ToDo Tasks may therefore be displayed on different dates in Lotus Notes and on the Newton. This is correct behaviour.

When synchronising Lotus Notes ToDos to the Newton, Cadenza uses the following rules to determine the Newton Date and Reminder period: -
If there is neither a Start Date nor a Due Date, use the current date as the Newton Date and set the Newton Reminder period to "None"
If there is a Start Date but no Due Date, use the Start Date as the Newton Date and set the Newton Reminder period to "None"
If there is a Due Date but no Start Date, use the Due Date as the Newton Date and set the Newton Reminder period to "None"
If there are both Start and Due Dates, use the Due Date as the Newton Date and use the difference between Start and Due Dates as the Newton Reminder period.
NOTE: The maximum Reminder period on the Newton is 7 days. Where the difference between Start and Due Dates in Lotus Notes is greater than 7 days and the Start Date is not in the past, the Newton will display the new ToDo Task on the correct Start Date even though the Reminder period on the Newton says 7 days. Where the Start Date is in the past, since the Newton does not allow you to create ToDo Tasks in the past, it will display the new ToDo Task on today's date having adjusted the Reminder period accordingly.

New entries: During synchronisation, new ToDo Tasks on the Newton will automatically create new ToDos in Lotus Notes and vice versa provided, of course, that the date range chosen on the Synchronise slip includes the ToDos in question.

Changes: Any changes you make at either end will be synchronised.

Conflicts. All Newton ToDo Tasks are stored on the Newton as a single record for the day in question. If there is more than one ToDo Task on a day and one or more of them has changed, the Cadenza client (on the Newton) cannot determine which ones have changed – it only knows that something on that day has changed. During synchronisation, it therefore sends all the ToDo tasks for that day to the Cadenza server (as "Conflicts") and the Cadenza server works out which ToDo Tasks need updating.
If, for any ToDo Task, the Cadenza server cannot compute an outright winner (i.e. there have been changes at both ends since the last synchronisation), then both versions of the ToDo Task will be preserved and both will appear on the Newton and in Lotus Notes. The user must decide which one, if either, should be deleted.

Deletions: Deletions at either end will automatically synchronise.

3.5.3 Synchronising Dates

The field mapping for calendar entries is not accessible and cannot therefore be changed.

The Calendar Entry Options in your user profile in the Cadenza control database contain two user settable parameters that affect the operation of Dates synchronisation. These are: -

Hide new Calendar Entries from public viewing: Yes/No
Remove Invitations from my Inbox after I respond to them: Yes/No

The settings of these parameters only affect what happens in Lotus Notes to calendar entries/responses generated on the Newton. The settings do not need to be the same as their counterparts in your

Calendar Profile in Lotus Notes. In other words, your Lotus Notes Calendar profile controls what happens when you generate entries using Lotus Notes. The settings in your Profile in the Cadenza control database control what happens when you generate entries on your Newton.

New entries:
Appointments/Invitations: Lotus Notes allows you to create both Appointments and Invitations. Creating either of these types of entries in Lotus Notes will create a Meeting on the Newton when you synchronise.

A new Meeting on the Newton will create an Appointment in Lotus Notes only if the Newton Meeting has no invitees and no Location. If it has either Invitees or a Location, a Lotus Notes Invitation will be created and invitations will be issued to the Invitees and Location as appropriate. Similarly, adding Invitees and/or a Location to a Newton Meeting that previously didn't have any Invitees or a Location, will change the entry in Lotus Notes from an Appointment to an Invitation and will issue to invitations to all Invitees and/or the Location.

Rescheduling a Meeting on the Newton has the same effect as rescheduling it in Lotus Notes.

Whilst Lotus Notes supports Resources in addition to Locations, the Newton does not. It is not, therefore, possible to book resources from the Newton but, if you reschedule a meeting from the Newton, any resources previously booked for that meeting through Lotus Notes will be rescheduled along with the Invitees and Location.

Events: Lotus Notes events become Newton events and vice versa. See also "Repeating Entries" below.

Reminders: There is no direct equivalent of a Lotus Notes Reminder on the Newton. Reminders therefore become Events on the Newton. If you do not change the Event on the Newton, it will remain as a Reminder in Lotus Notes. If you do change it on the Newton, it will change to an Event in Lotus Notes.

Anniversaries: When you create an Anniversary in Lotus Notes, you have to use the Repeat facility to tell it how many instances of the Anniversary you want to create. Each one can then be amended or deleted individually. For this reason, Lotus Notes Anniversaries become Events (not Annual Events) on the Newton. A Newton Annual Event is, however, created as an Anniversary in Lotus Notes.

Invitations responses: You can use your Newton to respond to any meeting invitations you receive. This is done from the Newton's In Box (see Responding to Meeting Invitations in the Cadenza Mail section).

Repeating entries: Many of the options for repeat patterns on Lotus Notes and the Newton are not compatible. When synchronising any repeating entry, the actual dates of the repeat pattern will be matched exactly but, if you open an entry on the Newton, the Repeat may show an apparently incorrect repeat pattern (and date range) e.g. "Every Day".   This should be ignored – the Lotus Notes and Newton dates will match correctly whatever it says in the Repeat and Dates fields on the Newton.

The Newton supports indefinite ("Ongoing") repeat periods. In Lotus Notes, each instance of a repeated entry requires its own document. Cadenza deals with this by only synchronising those instances of a repeated event that lie within the selected Dates range that you set on the Synchronise slip before synchronising. For example, if you create an Annual Event on the Newton for the 25th December 1997 with a repeat of "Ongoing" and then synchronise using a Date range of November 1st 1997 to December 31st 1997, only the first instance of the Annual Event will be synchronised to Lotus Notes. If you subsequently synchronise using a Date range of 24th December 1997 to 26th December 2000, there will now be 4 instances of this Annual Event in your Lotus Notes calendar. In this way, Cadenza keeps your Newton and Lotus Notes calendars synchronised indefinitely without having to create vast numbers of Lotus Notes documents in a single synchronisation session.

Conflicts: Conflicts are handled according to the setting of the "On conflict" picker on the Synchronise slip.

Deletions: Deletions at either end will be synchronised. If you are the Chairperson of a meeting and delete it on your Newton, it will be treated in Lotus Notes as if you had cancelled the meeting i.e. cancellation notices will be sent to all Invitees and the Location and Resources (if any).

3.6 Database Browser

This function is not implemented in this release.

When implemented, it will provide the means to:-
a) browse and download suitable Lotus Notes forms to the Newton.
b) browse suitable views within any Lotus Notes database and select documents for download.

The process of downloading a form will automatically translate it into a piece of Newton stationery which can them be used in Newton Notes to view, edit and replicate documents that have been downloaded from that Lotus Notes database. The stationery can also be used to create new documents for upload to the Lotus Notes database. In this way, Cadenza will allow the Newton to operate as a thin Lotus Notes client in conjunction with virtually any Lotus Notes database.