

# Notion™

# The List Manager

Version 2.0

User Guide

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Notion: The List Manager Version 2.0

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Registration Number

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# Chapter 1

## Introduction

Thank you for purchasing Notion. We hope it will enhance your Newton system, and that this manual will help to make Notion and your Newton more useful.

### What is Notion?

Notion is a tool for creating and managing lists that functions similarly to a database. You can use Notion to sort your lists, search them, and create archives.

Notion also includes several tools to help you work with lists. You can use Converge to merge data from two lists, Manage to designate which lists you want to be available for quick access, Browse to create new lists from templates, and Design to create templates.

### Installing Notion

To install Notion, copy the Notion packages to the hard drive of your desktop computer. You can then use the Newton Package Installer or the Newton Connection Utilities to install the packages onto your Newton.

**Note:** If you have a previous version of Notion already installed on your Newton, you must remove it before installing Notion 2.0. To do this, open your Extras Drawer, and make the “scrub” gesture over the Notion icon. Any Notion

Extras installed (Browse, Converge, Manage, and Design) should also be removed.

Notion 2.0 comes in a modular format. Below is a list of the packages and their sizes:

Mac Filename	Windows Filename	Description
Notion.pkg	notion.pkg	Application
Browse.pkg	browse.pkg	Browse Extra
Converge.pkg	converge.pkg	Converge Extra
Manage.pkg	manage.pkg	Manage Extra
ListDesigner.pkg	design.pkg	List Designer Extra
Online Help.pkg	help.pkg	Online Help
Notion Connect	\connect	Directory
Connect.pkg	connect.pkg	Connect Extra
Notion Connect	connect.exe	Connect Desktop App
Templates	\templts	Directory
Builtin.pkg	builtin.pkg	Built-in Templates
Business.pkg	business.pkg	Business Templates
Leisure.pkg	leisure.pkg	Leisure Templates
Personal.pkg	personal.pkg	Personal Templates
Reference.pkg	reference.pkg	Reference Templates

All the above packages except for the Notion 2.0 package are auto-parts, meaning that they appear in the Extensions folder of the Extras drawer.

## Removing Notion from your Newton

To remove Notion, follow the instructions in your Newton user's guide for removing an application. If you wish to remove Notion Extras, you will find them in the Extras Drawer's Extensions folder.

To remove all Notion lists, open the Extras Drawer to the Storage folder, and make the scrub gesture over the Notion icon.

## Launching Notion

There are two ways to launch Notion:

1. Open the Extras drawer and tap the Notion icon. Notion will run and the last list you had open will appear.

2. Tap the Notion status-bar button . When activated, this button appears on the status bar in the application you have set as the default backdrop. Tapping it will open Notion to the last list you worked with, give you a list of active lists to choose from, or open an entry slip from the last list you worked with. The button's behavior is controlled by a preference in Notion.

Note: The status-bar button is disabled when you install Notion. To activate it, you must open Notion and enable it from the Preferences slip. See the Preferences chapter for instructions.

## Hiding Notion

You can hide Notion to access other features of the Newton. Notion may be hidden by tapping the Hide button  in the upper-right corner of the Notion display.

Note: When Notion is hidden it is still running, but is simply not visible. This means that if Notion is installed on a memory card, you cannot remove the memory card without getting an error message.

## Making Notion the Backdrop Application

If you use Notion frequently, you can make it the backdrop application so that it opens automatically every time you turn on your Newton. You can make an

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application the backdrop application only when it's stored internally—not on a card. Follow these steps:

1. Tap Extras to open the Extras drawer.
2. Hold the pen on the Notion icon until you see the highlighting mark.
3. Tap the Routing button and then tap Make Backdrop.
4. Tap OK in the box that appears.

Note: There is no close box in the Notion status bar when it's opened as the backdrop application. This is because Notion is always open when it's the backdrop. To use another application, you must open it on top of Notion.

## For Users of Previous Versions

Here are the changes from version 1.5 of Notion:

### Status Bar

The buttons on the status bar at the bottom of the screen have changed. The appearance of some buttons has changed, as well as the features available through the buttons. The changes are as follows:

- The Checkmark and Select buttons have been replaced with an Items button.
- The Export Selected Items To feature moved to the Items button
- The Items button includes a check or uncheck all feature.
- The Notion button has been removed. The Duplicate list, Delete list, and Rename list features have been moved to the Routing button. Also, a Scroll to Top and Scroll to Bottom moved to the Items button.

## Entry Slip

- To enter your item in the list, tap Enter *instead* of “x”. Tapping “x” now closes the slip without saving it’s contents.
- The sticky note button has been moved to the list view, and appears to the right of the corresponding list item.
- The alarm button now allows you to add an item to the Dates application as a Meeting or To Do as well as an Event.

## Other new features

- Notion now uses the complete screen space on MP2x00 and eMate devices, and fully supports landscape orientation on MP120/130 devices.
- More fields are allowed per list item. The entry slip now scrolls to accomodate lists with more fields.
- Sticky notes are now directly accessible from the list view. To add or edit a note, tap the sticky note icon to the right of the list item.
- Sticky notes scroll, and can be as long as memory allows.
- Show Specified Items feature lets you create filters to only show items which meet a certain criteria.
- Newton 2.x routing is now supported, which means things like email work properly (and beaming now works on Newton 2.1 devices).
- Diamond lists can now be of any length, and the diamond list editor scrolls.
- Keyboard support for Newton 2.1 has been much improved and extended.

## List Designer

- Added support for calculated fields. Calculated fields can contain formulas which use the other fields in a list item to compute a value.
- List Designer now works in landscape on 120/130 devices.

## Using Notion with an eMate or External Keyboard

You can use an external keyboard to quickly enter data into Notion. With the entry slip open, you can use the Tab key to move to the next field, and Shift-Tab to return to the previous field. If you press the Return key, your item will be added to the list, and Notion will move to the next item in the list with the entry slip open. If you are working with the last item in the list, a new item will be created. You can press Shift-Return to return to the previous item.



## Switching between lists

### Using the Active List

When Notion is running, the name of the list currently being displayed appears at the top of the screen (see the screen shot on the previous page). To switch to another list, tap the list's name and a menu of your other lists will appear. This menu is called the "Active List". Tap the desired list in the menu and it will open.

### Using Manage

You can also open a list with the Manage feature. Tap Notion Extras button  and select Manage from the list that appears. Tap to highlight the name of the list you want to open. Then, tap the **List** button and select Switch to List from the menu that appears.

## Scrolling through lists

A Notion list can be as long as your available memory can allow, so you may have lists that use more than one screen. To scroll through a Notion list, use the up/down arrows on the Newton's built-in button bar. To quickly scroll to the bottom or top of the list, tap **Items** and select Scroll to Top or Bottom.

## Fields

A Notion list is like a database that can contain any number of items organized into different *fields*. The fields a list will be organized by appear at the top of the list.

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Expenses			
Type	Location/Item	Date	Amount
Hotel/Motel	LasVegas Hilton	11/17/98	\$120.00
Parking	Las Vegas	11/17/98	\$10.00

Field Headings

When editing a list item, it's entry slip will contain the fields used in the list:

◆ Type

Location/L...--

Date --

Amount --

Notion supports twelve different types of fields including plain text, date, number, currency, calculated, and more. For a complete description of the available field types and instructions for creating lists that use them, see the section “Choosing Fields” in Chapter 7 “Creating Lists with Design”.

## Changing a field name

To change the name of a field, first tap it's heading at the top of the screen to highlight it (the list will sort on that field). Then, double-tap the highlighted heading and write the name you want in the box that appears.

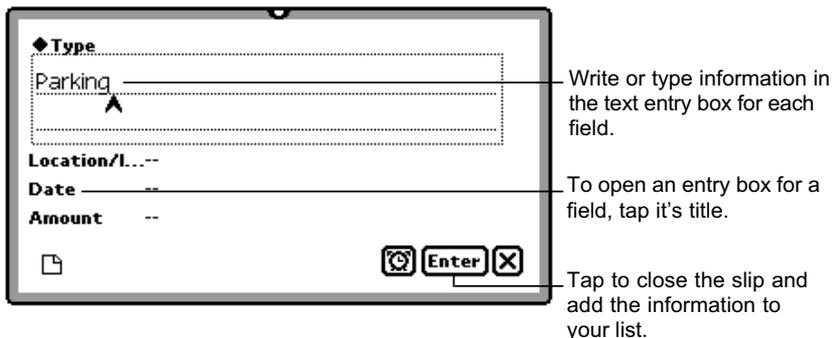
The List Designer also allows you to name any field that you create. See the Design section of the Notion Extras chapter for instructions.

## Entering information

In Notion, you must use an *entry slip* to enter information instead of writing or typing directly into the list view.

## Entering a new item

1. Tap **New**, or tap the item in the list where you'd like to add information. An entry slip appears.
2. Type or write your data in the text entry box for each field.



3. Tap **Enter** to save your changes when finished. You can also tap “x” to close the slip without saving your data.

## Changing an existing item

You can change any list item by tapping it and making changes in the slip that appears. The field that you tap will be open for editing when the slip appears.

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You can change some kinds of fields (those that do not accept text, such as Priority and enumerated fields) without opening an entry slip. Tapping one of these fields displays a list of choices. Tap your choice to make the change.

## Entering multiple items quickly

You can move through your list with the entry slip open, you don't have to close it and reopen it for every item you'd like to enter. To move through your list while you have an entry slip open, tap the up/down arrows on the Newton's built-in button bar. If you tap the down arrow and there are no more items, a new entry slip will open.

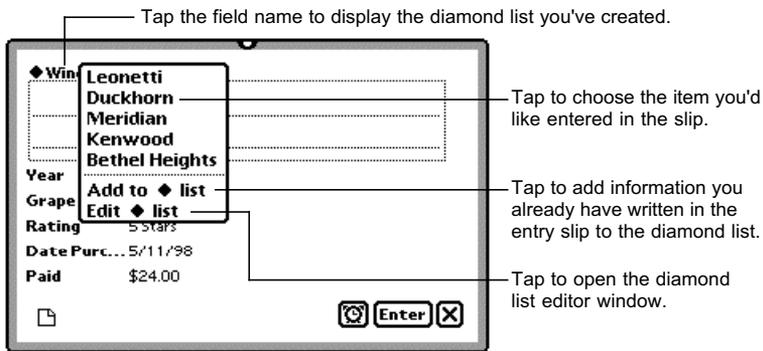
If you're using a keyboard, you can press Return with an entry slip open and Notion will move to the next item in the list. Shift-return will move you to the previous item. You can also use Tab to move between fields in the entry slip. Tab moves one field forward, shift-tab opens the previous field.

## Diamond Lists

If you frequently enter recurring information in your list, you can speed up the entry process by creating a diamond list containing that information.

For example, if you have several colleagues that you often call, you can add their names and phone numbers to the diamond lists in your "Calls to make" list. When you update the list, you can use the diamond list to add the information instead of writing it in the slip.

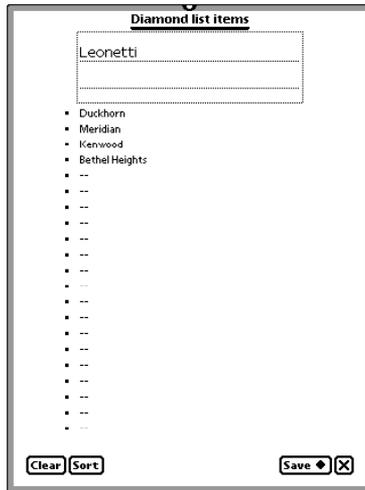
Diamond lists appear as a pop-up menu when a field is tapped in the entry slip. Tap to select an item on the diamond list and it will automatically appear in the entry slip.



## Creating Diamond Lists

1. Open an entry slip.
2. Tap the field for which you want to create the diamond list.
3. Tap **Create ♦ list** .

The diamond list items window will appear:



4. Tap an entry area to open a text box and enter your items.
5. Tap **Save** before closing the window. Your list will appear as a pop-up menu when you tap it's field in the entry slip.

## Editing an existing diamond list

To make changes to a diamond list, select **Edit ♦ List** from the menu and make your changes in the diamond list editor that appears. Tap **Save** to close the slip and save your changes when finished.

To quickly add an item to an existing diamond list without opening the Edit window, enter the item you want to add in the field's entry slip. Then open the diamond list and tap **Add to ♦ list**.

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## Using the Call Button

If an item includes a name field, the Call button will be present at the bottom of the entry slip. The call button allows you to quickly access the Newton's Call slip.

When you tap the Call button, Notion activates the Newton's Intelligent Assistant to bring up the Call slip. The call slip gives you the telephone number of the person you are calling, as well as dialing information. If you are connected to a modem, the call slip can also dial the telephone.

When you tap the Call button in the Call slip, the Newton's Call Log application is opened. This application allows you to keep track of telephone calls. For information on using the Call Log application, please see the documentation which came with your Newton device.

## Setting an Alarm

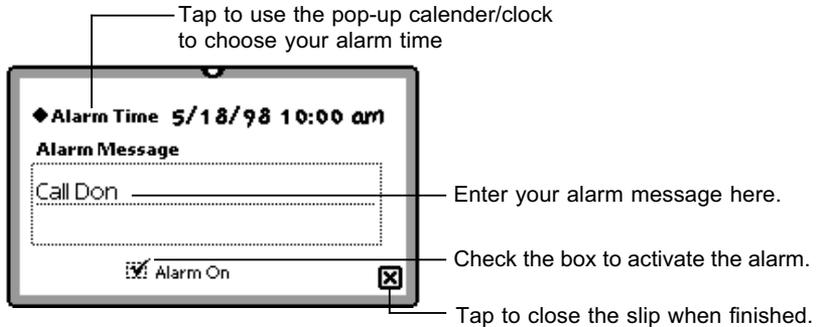
Any list item can have an alarm attached. The Alarm button  is located in the entry slip.

To set an alarm for a specific item in your list:

1. Open the entry slip for the desired item.
2. Tap the Alarm button  and a menu appears:



3. Tap **Set Alarm** to get the alarm window.



4. Tap **Alarm Time** to get the pop up calendar/clock. Choose a time and tap “x” to close the calendar/clock slip.
5. Check the Alarm On checkbox, and tap “x” to close the Alarm slip. The alarm is set.

## Link to the Date Book

You can use the Alarm button  to add an item to the Newton’s built-in Date book.

To add a list item to your Newton’s built-in Date book:

1. Open the entry slip for the desired item.
2. Tap the Alarm button  and select **Add to Dates** as an Event, a meeting, or a To Do. The calender pop-up appears.

3. Choose the date you need and close the calendar pop-up. The appropriate window in the Date book will open with the item and date filled in to the Title and Date slots. See your Newton manual for further instructions on using the Date book.

After you have added an item to the Date book, the Alarm button menu for that item changes:



- Use **Remove from Dates** to delete the item from the Date book without opening it.
- Use **Open Dates** to make changes to the item in your Datebook. Note that Notion will continue running while your Date book is open. Tap “x” in the Datebook window to return to Notion.

## Creating sticky notes

Each list item has a “sticky note” associated with it. You can write or draw on the note and it will always “stick” to this item.

You can open the sticky note for an item from the list view, or from the entry slip for the item. Tap the sticky note icon in either view to open the note for editing. Tap “x” to close the slip when making changes.

Expenses				
Type	Location/Item	Date	Amount	
Hotel/Motel	Las Vegas Hilton	11/17/98	\$120.00	
Parking	Las Vegas	11/17/98	\$10.00	

Tap here to open the sticky note for editing in this view.

Tap here to open the sticky note for editing while the entry slip is open.

The screenshot shows a form with the following fields: **Type** (with a dropdown arrow), **Location/...**, **Date**, and **Amount**. The **Type** field contains the text "Parking" and has a mouse cursor pointing to it. Below the form is a sticky note icon. To the right of the sticky note icon are three buttons: a gear icon, an "Enter" button, and an "X" button.

The Sticky Note button in the entry slip changes if a note has been added to the item:

-  Empty sticky note
-  Sticky note with information

## Printing/Faxing sticky notes

To print a sticky note, open the Sticky Note window and tap the Routing  button. Select **Print** or **Fax** from the menu that appears.

## Duplicating, Deleting, or Renaming Lists

To duplicate, delete, or rename the list you're currently using, tap the Routing button , and choose the function you wish to occur.

## Working with items in a list

### Sorting

Sort a list by tapping the heading of the field you want to sort. For instance, if you'd like to sort a "Birthdays" list by date, you can tap the Date field heading at the top of the list. The heading will highlight and sort the list by date.

Tap this icon to sort the items in the order that they were entered.

Tap the field heading to sort the list on the contents of the field.

Wine Cellar			
Winery	Year	Grape	
Rating	Date Purchased	Paid	
Duckhorn	1994	Cabernet Sauvignon	☰
5 Stars	11/22/96	\$30.00	
Adelsheim	1995	Cabernet Sauvignon	☰
3 Stars	12/20/97	\$22.00	
Meridian	1996	Chardonnay	☰
4 Stars	6/5/97	\$12.00	
Duckhorn	1997	Chardonnay	☰
5 Stars	5/11/98	\$24.00	
Leonetti	1994	Merlot	☰
5 Stars	4/1/98	\$48.00	
Kenwood	1995	Merlot, Private Reserv	☰
5 Stars	3/18/98	\$45.00	

Fields are sorted in this order:

1. Punctuation marks
2. Numbers (from 0 to 9)
3. Spaces
4. Letters (from A to Z, disregarding capitalization)
5. Special characters.
6. Dates and times are sorted in chronological order.

## Checkboxes

### Using Checkboxes

Each item has a checkbox. Checkboxes have no special meaning, so you can assign them any meaning you like from list to list. For example, you can use the checkbox in a to-do list to indicate you've done that item, or the checkbox in a grocery list to indicate you've found that item.

To check or uncheck an item, tap the dotted box to the left of the item.

To Check or Uncheck all items, tap **Items** and make your choice.

Note: If you check an item, the checkmark stays until you remove it, even if you go to another list.

### Checkbox Actions

You can use the checkboxes to select, delete or archive the items in your list. To do so, check the items you wish to work with and select the option of your choice from the **Items** menu.

## Archiving Items

You can remove items from a list without deleting them from Notion. For example, if you have completed to-do items, you can move them from your to-do list to an archive to keep a record of tasks you've completed. An archive is a copy of a list where you can store items that you do not want to appear the original. Each list can have only one archive.

### Storing Items in an Archive

To store items in an archive, follow these steps:

1. Go to the list you want.
2. Make sure that the items you want to store are checked. To check an item, tap the dotted box to the left of the item.
3. Tap the **Items** button, then tap Archive Checked Items.

Notion will then move the items to the archive list. If no archive for the list has been created, Notion will create one for you. The archive list has the same name as the list you're working with, followed by the word "archive".

Archives are not initially included in the Active List. To make them active, or to open them, use the Manage utility. See the Notion Extras chapter for instructions.

## Selecting, Deselecting, and Deleting items

### Selecting Items

Notion allows you to select multiple items in a current list so that you can

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perform actions on them as a group. You can select items as you would in the Notepad. Selected items appear highlighted.

- To select an item, hold the pen on the item until you see the highlighting mark. When you lift the pen, the item is selected.
- To select another item, repeat the procedure.
- To select multiple neighboring items, hold the pen on an item until you see the highlighting mark, then draw through the items you want selected.
- To select all items in the list, tap **Items** and choose **Select All**.

### **Deleting or duplicating selected items**

To delete or duplicate selected items, select the desired items and tap **Items**. Make your choice from the menu that appears.

### **Deselecting items**

To deselect items, hold the pen on a highlighted item until it is no longer highlighted. To deselect all items, tap **Items** and choose **Select None** from the menu.

## **Exporting selected items to the Newton's Notepad or To Do list**

You can export selected items to the Notepad. The information on some lists (e.g. lists created from the To Do list template) can be exported to other applications, such as Newton's built-in To Do list.

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1. Select the items you'd like to export.
2. Tap **Items** and select **Export Selected To**.
3. Select the options you want in the slip that appears and tap **Export**.

## Deleting items

To delete an item, scrub it out. To recover an item that was just scrubbed out, tap **Undo**. You can also select or check the item(s) you wish to delete and choose the appropriate delete option from the **Items** menu.

To delete information in a field without deleting the whole item, tap the item to open the entry slip, then scrub out the information you want to delete.

Moving Items to and from a Memory Card

## Filing items

You can file items internally or on a memory card using the File button .

Select the items you want, then tap the File button. Choose the store you wish to file your items to and tap **File**.

## Finding and showing specific items

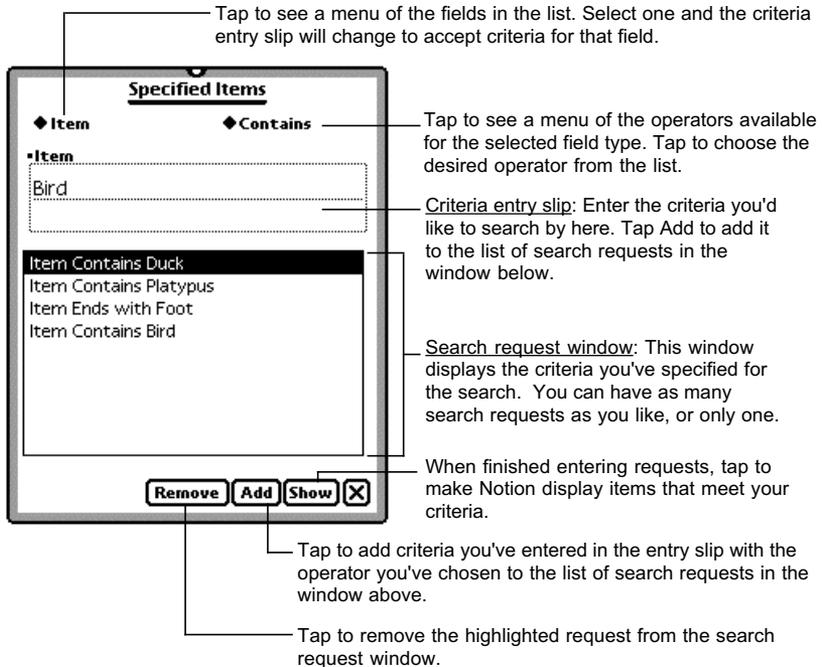
You can use the Specified Items function in the **Show** menu to search your list for items that meet criteria that you specify. After Notion searches the list for items containing information that meets your criteria, Notion will display those items in the list view, and will hide items that don't. To show the items that have been hidden after a search, tap **Show** and select **All Items**.

## Using specified items to do a search

You can make as many search requests as you like, on any number of fields and any criteria. When Notion is finished with the search, it will display any items that meet any of the criteria you specified.

### 1. Tap **Show** and choose **Specified Items....** .

The specified items slip appears:



2. Select the field you'd like to search in by tapping the field picker in the top left hand corner of the window.
  3. Choose an operator for your request. Tap the operator pop-up button in the upper right hand corner of the window to select from the available operator types for that field. For instance, if you'd like to search for fields that begin with the word "Duck", you'd choose "Begins with" from the operator menu.
  4. Enter the desired criteria in the entry slip for the field.
  5. Tap **Add** to add your search request to the list of things Notion will search for. You can search based on one request only if you like, or you can repeat steps 2-5 to add more.
- To remove a request you've added, tap to highlight it and tap **Remove**.
6. When you're done entering search requests, tap **Show**. Notion will display any items that meet your criteria. Other items in the list will be hidden (to show them, tap **Show** and select **Show All**).

## Notion Extras

In addition to the Notion application, this version of Notion includes five tools that greatly enhance Notion’s functionality. The tools are:

- Browse- for creating lists from templates or based on existing lists.
- Design- for creating your own list layouts and templates. See the next chapter “Creating lists with Design” for instructions on using Design.
- Converge- for transferring items from one list to another.
- Manage- for managing the lists available on your active list menu, deleting lists, or duplicating lists.
- Connect- for transferring lists in tab-delimited format to a desktop computer.

Each tool is a package that can be installed separately. None of the tools are required for the main Notion application to run. However, to get the most out of Notion, we suggest installing all of them (with the possible exception of Connect, if you don’t plan to transfer data to a desktop). When installed, they can be accessed by tapping the Notion Extras button .

## Creating Lists from Templates with Browse

A template is a pre-formatted list that can be used like a printing plate to create new, blank lists. Five built-in templates are included when the Notion package is installed. These templates are called: A plain list, Credit Card Charges, Groceries, Things to get, and To Do list. The five lists that appear in the Active List were created from the built-in templates.

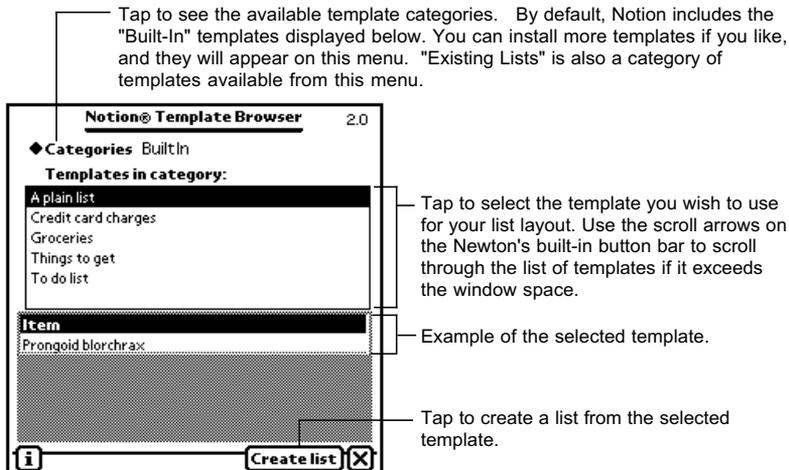
There are more than five templates available. The Notion diskette includes dozens of templates for your use. They're organized into categories to make it easier to find the one you need. The categories are: Built-in, Business, Leisure, Personal, and Reference. These categories appear on the disk and are stored in Newton as "packages". You can install any number of these packages on your Newton's storage card or internal memory. None of them are necessary for Notion to operate.

## Using the Browser

To create a list from a template, use the Template Browser. To use the Browser, follow the steps listed below.

1. Tap the Extras button  and choose **Browse**.

The Template Browser Window will appear:



2. Tap **Categories**, then select which category of templates you wish to view. The categories include the built-in lists, the lists included in the Template package, and any of your existing lists.
3. Select the template you want to use as a layout by tapping the name until the highlighting mark appears.

Here are the things to look for when selecting a template:

- **Number of fields:** Decide how many pieces of information each item should contain. If you need to have a catalog number, a title, a value, and a cost field, make sure your template has four fields.
  - **Types of fields:** Make sure the types of fields you need, such as numbers, dates, or phone numbers, exist in the template.
  - **Layout:** Make sure the fields are arranged the way you need.
4. Tap **Create list**.
  5. Name your new list in the slip that appears; then tap **Create**.

## Modifying existing lists

You cannot modify an existing list directly. If you want to add or change fields in an existing list, you can use that list as a starting point for creating a new layout with Design. Then you can use Converge (see the next section) to transfer your old list's contents to your new one.

## Transferring Items with Converge

You can use Converge to combine the contents of two lists. For example, you might have two lists that contain names and addresses: one for business contacts and one for personal contacts. You can use Converge to transfer information from one list to the other.

To use Converge:

1. Open the list that you want to transfer items to. Tap the Extras icon, and select Converge. The Converge dialog box will appear.
2. To choose which list you will transfer from, tap **From** and choose from the pop up list that appears.
3. The fields you are transferring items from are on the right. The corresponding fields you are transferring items to are on the left. You can change the fields on the From side if you need the fields to line up differently. To change a field on the From side, tap it and a pop up of the other possible fields will appear. If you don't want anything to transfer from a particular field, select **None** in the pop up.
4. Tap **Converge**.

## Managing Your Lists

The Active List allows you to access your most frequently used lists. When you've been using Notion for awhile, you may want to add a new list to your Active List, or to remove an old one. You may also want to duplicate a list. You use the Manage utility to perform these tasks.

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To open your List Manager window, select Manage from the Extras menu. In the window that appears, tap the List button to perform actions on the selected list.

## **Connecting to a Desktop Computer**

Connect is a Notion Extra which allows you to exchange data between Notion and desktop computer systems. It uses a direct connection to a desktop computer; no other software is required.

The Connect system consists of a Macintosh or Windows server, and a Newton client. A desktop application called “Notion Connect” is included on the Notion diskette. Once installed, you can use Notion Connect and the Connect feature within Notion to exchange data via a serial cable.

Notion data are translated into tab delimited text, a format read by most desktop word processor, database and spreadsheet applications. Files that you wish to transfer to Notion from a desktop application should be saved in a tab delimited text format. Data may be exchanged between the Macintosh/PC and the Newton as a text file or through the desktop computer’s clipboard.

Instructions for installation and use of Connect are different for Macintosh and Windows desktops. Windows PC users should skip ahead to the Windows instructions.

## **Using Connect with a Macintosh**

### **Installing Connect**

To install Connect, copy the Notion Connect desktop application to your Macintosh hard drive, and download the Connect package to your Newton.

## Configuring the Macintosh

To use Connect, both your Newton and your Macintosh must be connected to a LocalTalk network. All Macintosh computers include LocalTalk networking. To configure your Macintosh for Connect, use the Macintosh's Chooser to turn on AppleTalk, and check your Network preferences to make sure that LocalTalk is selected. For more information about using LocalTalk, refer to the users guide that came with the Macintosh.

To connect the Newton to the Macintosh, use a serial cable. The cable must be plugged-in to the Macintosh's printer port.

## Transferring Information to the Newton

Importing data from your Macintosh to your Newton can be accomplished by configuring your Macintosh for a LocalTalk connection as described above and following these steps:

On the Newton:

1. Open Notion.
2. Tap the **Extras** button, and select **Connect**.
3. Select the options you wish to use. Connect will save the options you select so that you can skip this step when connecting to the same desktop computer in the future.
  - a. Connect Via: choose **AppleTalk**.
  - b. Connect To: The name of the last Macintosh connected will appear. If setting the options for the first time, or changing the computer you will connect to, choose Other Computer. Connect will look for the server on the .....

Network and display it's name in the dialogue window. Tap to select the server, then tap "x" to close the slip.

On the Macintosh:

4. Save your data as tab delimited text or copy it to the clipboard.
5. Open the Notion Connect application, then:

If you are sending from the clipboard, select **Edit** and **Send from Clipboard**.

If you are sending a file, select **File** and **Open**, then open the appropriate file. (If you wish, you may drop the file onto the Notion Connect icon, and it will open and be ready to send.)

On your Newton:

6. Tap **Receive**. This must be tapped promptly after **Send** is selected on the Macintosh. A delay might cause the connection to drop. If the connection is lost, just repeat the send and receive process (steps 5 and 6).

## Transferring Information to the Macintosh

Exporting data from your Newton to your Macintosh can be accomplished by configuring your Macintosh for a LocalTalk connection as described above, and following these steps:

On the Newton:

1. Open Notion.
2. Tap the **Extras** button, and select **Connect**.

3. Select the options you wish to use. Connect will save the options you select so that you can skip this step when connecting to the same desktop computer in the future.

a. Connect Via: choose **AppleTalk**.

b. Connect To: The name of the last Macintosh connected will appear. If setting the options for the first time, choose **Other Computer**. Connect will look for your server on the Network and display it's name in the dialogue window. Tap to select the server, then tap 'x' to close the slip.

On the Macintosh:

4. Open Notion Connect.

5. Select either the File menu and **Receive File** or the Edit menu and **Receive to Clipboard**. See below for a description of these options.

On the Newton:

6. Tap **Send**. This must be tapped promptly after Receive is selected on the Macintosh. A delay might cause the connection to drop. If the connection is lost, repeat the send and receive process (steps 5 and 6).

Data is exported from Notion in a tab-delimited text format. You can save it as a text file on your desktop computer, or you can paste it from the Clipboard directly into a database, spreadsheet, or word processor.

If you received the list to the clipboard, open your desktop document, and select Paste. The exported list should appear.

If you chose to save the list as a file, it has been saved as a text document. You can open it with SimpleText or from within any desktop application that reads text. Most desktop database, spreadsheet, or word processor applications can read text files. Once the document has been opened from within a desktop application, it can be saved as a document in the format of that application.

## **Using Connect with a Windows PC**

To use Connect you need to connect your Newton to your PC using a serial cable. Communication ports one or two should be used if possible. A cable such as the one that came with your Newton device is appropriate.

### **Installing Connect**

To install Notion Connect, you need to copy the Notion Connect application to your Windows hard drive, and download the Connect package to your Newton.

### **Configuring the Windows PC for Connect**

After Notion Connect is installed on your Windows PC, you must configure the correct communication port to correspond to the port where you've plugged in your serial cable. To do this, start the Notion Connect for Windows application. Select the Edit menu, then Preferences. Select the appropriate communication port and click the OK button.

### **Transferring Information to the Newton**

Importing data from your Windows PC to your Newton can be accomplished by configuring your Windows PC as described above and following these steps:

On the Newton:

1. Open Notion.
2. Tap the **Extras** button, and select **Connect**.
3. Select **Connect Via: Serial**.
4. After setting the options, tap **Receive**. Your Newton must be set to receive before the file is sent from your desktop.

On the Windows PC:

1. Save your data or copy it to the clipboard.
2. Open the Notion Connect application and:
  - a. If you are sending from the clipboard, select **Edit** and **Send from Clipboard**.
  - b. If you are sending a file, select **File** and **Open** and open the appropriate file.

## Transferring Information to the Windows PC

Exporting data from your Newton to your Windows PC can be accomplished by properly configuring your Windows PC and following these steps:

On the Windows PC:

.....

1. Open the Notion Connect application.
2. Select either the **File** menu and **Receive File**, or the **Edit** menu and **Receive to Clipboard**.

On the Newton:

1. Open Notion.
2. Tap the **Extras** button and select **Connect**.
3. Select **Connect Via: Serial**.
4. Tap **Send**. This must be tapped promptly after Receive is selected on the Windows PC. A delay might cause the connection to drop. If the connection is lost, repeat the send and receive process.

Data is exported from Notion in a tab delimited text format. You can save it as a text file on your desktop computer, or you can paste it directly into a database, spreadsheet, or word processor.

If you received the list to the clipboard, simply open your desktop document, and select Paste. The imported lists should appear.

If you chose to save the list as a file, it has been saved as a text document. You can open it from within any desktop application that reads text. Most desktop database, spreadsheet, or word processor applications can read text files. Once the document has been opened from within a desktop application, it can be saved as a document in the format of that application.

## Serial Import/Export without Connect

You can exchange data with a computer which does not have Connect. This is useful if you wish to transfer data between Notion and a computer which is not Macintosh or Windows-based. To do this, you must have the Connect package installed on your Newton.

Note: This procedure assumes that you have a serial communications program, and are familiar with it. In addition, you must have a cable to connect your Newton to your computer.

### Communications Settings

You should set your terminal program to 9600 baud, No parity, 8 data bits, 1 stop bit, and XON/XOFF.

### Transferring Information to the Newton

1. Save your desktop document as text.
2. Connect the serial cable from the desktop computer to the Newton.
3. Open your communications program on the desktop computer.
4. Give your communications program the Connect command.
5. In Notion, tap the **Extras** button and select **Connect**. Ensure that the connection type is set to Serial.
6. In Connect, set the options and tap **Receive**.

7. When Notion shows the Connected message, send the file from your communications program as a text file.
8. When your communications program has sent the file, type a carriage return, and then the ESC key and another carriage return. Notion will then begin to import the file.

## Exporting to the Desktop

1. Connect the serial cable from the desktop computer to the Newton.
2. Open your communications program on the desktop computer.
3. Give your communications program the Connect command. If you have a File Capture option, turn it on.
4. Open Notion to the list you wish to export.
5. In Notion, tap the **Extras** button and select **Connect**.
6. Configure Connect for Serial and tap the **Send** button.

## Creating lists with Design

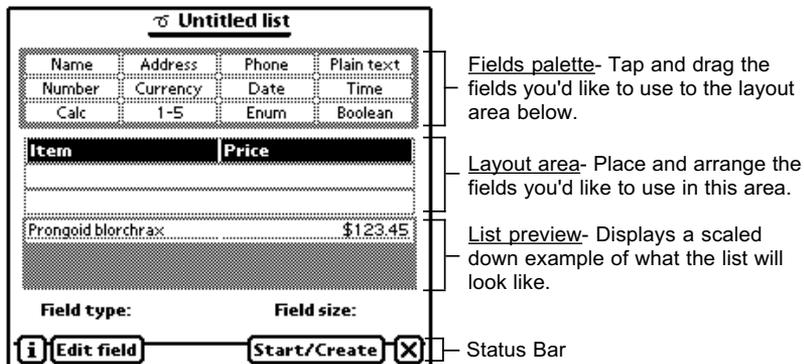
You can use Design to create your own list layouts using any combination of the twelve available types of fields. You can create a layout from scratch or use an existing list or template as a starting point. Once you've designed your layout, you can use it to create a list.

1. Tap the Extras button  and choose **Design**.
2. Choose a Starting Point. With Design, you can create your list from an existing list or template, or from a blank layout area. Design will give you a blank layout area as a default when opened. If you'd like to start from scratch with a blank layout, skip steps 3 and 4.
3. If you choose to create a layout from an existing list or template, tap the **Start/Create** button. The template browser will appear.
4. Choose the existing list or template you wish to use as a layout with the Browse Window. This window and its functions are described in the previous section on Browse. Once you've selected the template to start from, tap **Use as layout**. This will copy the template's format to the Design Window, where it can be modified and used to create a list.
5. Use the Design Window to create your list layout. See the next section for instructions on creating a layout.

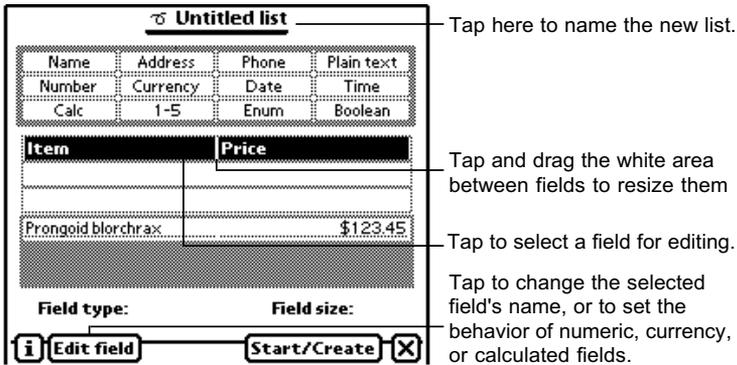
- To name the new list, tap the underlined title at the top of the Design window (its called “Untitled list” by default), and enter the desired name in the slip that appears. Tap **Rename list** when finished. If you started from a template or an existing list, Notion automatically uses that list’s name preceded by “New” for your new list.
- When you’re finished designing a layout, tap **Start/Create** and choose **Create List from Layout**. Tap OK in the confirmation window that appears. Notion will create your list and add it to the Active List menu.
- Tap “x” to close the Design window if you’re done creating new lists.

## Designing a Layout

The Design window has three main areas:



To design a layout, choose the fields you want included and drag them from the Fields Palette to the Layout Area (see the next section for a description of the field types and their functions).



Fields can be arranged, re-sized, and edited in the Layout Area:

- To move a field within the Layout Area, tap and drag it to the desired position. As you drag a field, you'll see areas of the screen highlight to show you where the field will be placed.
- To re-size a field, tap and drag the white area separating it from its neighboring fields until it is the desired width.
- If you want to delete a field you've dragged to the layout area, tap and drag it back to the Fields palette and it will be deleted.
- To change a field's title, tap the field to select it (it will highlight), and then tap the **Edit field** button. Enter the desired field name, and tap **Save Changes** when finished.
- If a field is for numbers or currency, you can use the Edit Field slip to place a box at the bottom of your list that displays the sum of all number or currency entries in the list. To do so, tap the field to select it (it will highlight), then tap

the **Edit field** button. Check the “Field is totaled” box, and tap **Save Changes** when finished.

- If the you’d like to use a calculated field, you can use the Edit Field slip to enter the formula you’d like the field to use. To do so, tap the field to select it (it will highlight), then tap the **Edit field** button. Tap **Edit Formula** and enter your formula in the slip that appears (see the section on calculated fields for more information about creating formulas). Tap **Enter** when finished, then tap **Save Changes** to close the Edit field settings window.

**Note:** You can use one two, or three lines in your layouts, but your fields must fill any line they occupy. Any blank lines you leave in the layout area will disappear when the list is saved.

## Choosing Fields

Following is a list of the field types available in Notion with description of their function. When you design a list, you can use a certain field type to make entering data in that field faster. For instance, when you use a date field for entering dates, a calendar pop-up will be available in that field for quick entry. Currency fields are useful because they add a dollar sign automatically, the Name field automatically capitalizes every word, and so on.

### Plain Text

Use the plain text field for entering any combination of text and numbers.

### Number or Currency

The Number and Currency fields only accept numbers. The currency field automatically adds the dollar sign to the number you enter. Some templates will

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automatically total the numbers you enter in this field. Those that do will have a box showing the total at the bottom of the list.

When creating a list with the Design tool, you can make the number or currency fields perform totals by checking Field is totaled box in the Edit Field Settings slip. See The Notion Extras Chapter for List Designer instructions.

## **Name**

The first letter of every word entered in the Name field will be capitalized. This field is linked with the built-in Name File in the Newton. To connect to the Name File, tap the diamond in the upper right hand corner of the entry slip and the Name File will open.

If you have the Auto-Fill feature in Preferences enabled, you can transfer any name, address and phone number from the Name File to the Notion entry slip you have open. Just open a new entry slip and tap the diamond to get the Name File. Highlight the person you want from the Name File and then close it. The information will automatically transfer to the Name, Address, and Phone fields in the entry slip.

Note: The Auto-Fill feature only works if the Name File entry is a was created as a Person, and not a Company or Group.

## **Phone and Address**

The address and phone number fields are linked to Newton's built -in Name File. Just tap the diamond in the entry slip and the Name file will open. See the Name Field section above for instructions on transferring information from the Name file.

## **Date and Time**

When opened the Date and Time fields automatically insert the current date and time. You can change the date or time by scrubbing out the current date/time and entering replacements. You can also make changes using the calendar or clock, which appear when you tap the diamond in the upper right hand corner of the slip.

## **Priority: 1-5, A-E**

There are two types of Priority fields. One is numbered 1-5, and the other is lettered A-E. In the entry slip, the Priority field has a pop-up list to select from. Tap the Priority field to make the pop-up list appear, then tap your selection.

After an item has been entered, a Priority field can be modified without opening an entry slip. Tap the Priority icon on the list and the Priority pop up menu will appear.

## **Yes/No**

The Yes/No field presents a box that is empty or filled. It fills when you tap it.

## **Enumerated**

The Enumerated field lets you pick from a set of choices. There is no box for entering text in the entry slip of this field. Instead, you must choose from the diamond list which appears when you tap the field.

After an item has been entered, the Enumerated field can be modified without opening an entry slip. Tap the Enumerated icon in the list and the pop up menu will appear.

## Calculation field

For a calculation field, you can write a formula that is a specific operation on one or more values in the list. For example, suppose your list contains two number fields- Unit Price and Quantity, and one calculation field you've called Subtotal. You want to calculate a value for Subtotal in each record, so you write the calculation formula:

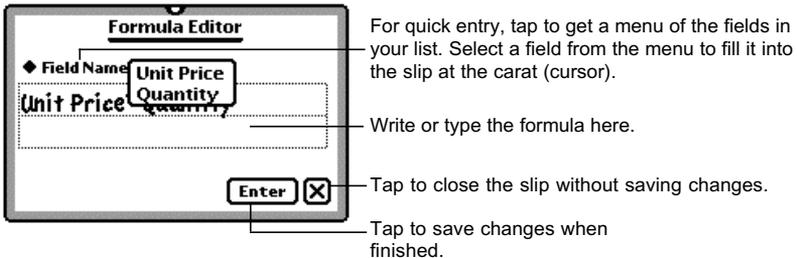
$$\text{Unit Price} * \text{Quantity}$$

for the Subtotal field. Then, each time you enter values in the Unit Price and Quantity fields, the formula multiplies those values and displays the result in Subtotal.

### Using Design to enter formulas in a calculation field

To create a calculation field and edit it's formula:

1. Drag the “Calc” field type to the desired place in the layout area.
2. Tap the “Calc” field in the layout area until it is highlighted.
3. Tap the **Edit field** button.
4. In the slip that appears, tap **Edit formula**. The Formula Editor slip appears:



## Understanding formulas

A formula contains one or more parts arranged in a particular order (called syntax) that determines the values to use and the operations to perform to produce the result you want. The following list explains each formula part and its syntax.

Expressions An expression is a value or any computation that produces a value. Expressions can be combined to produce other expressions. The Notion calculation field supports the following types of expressions:

<u>Type</u>	<u>Example</u>
Number constant	5
Field reference	Quantity
Combination of expressions	(Total-Discout)*Tax/100

Constants A constant is a fixed value that's part of the formula that doesn't change from item to item. In Notion calculation fields, constants must be numeric.

Field References A field reference is a field name that acts as a placeholder for the field's value. When Notion evaluates the formula in the current item, the value in the field represented by the field reference is used in the calculation. For example, the expression `Total * 0.075` would return 7.5 when the value in the Total field is 100.

Operators You combine the expressions in your formula using *operators*, which are symbols that determine which operation to perform on the expressions. You place operators between the expressions you want to perform the operators on, like so: `Subtotal - Discount`

Each operator has a precedence, which determines the order in which calculations are performed in a formula containing one or more operator. Notion

evaluates operators from left to right and performs multiplication and division before addition and subtraction.

You can change the precedence by enclosing the expression you want calculated first in parenthesis.

<u>This expression</u>	<u>Returns</u>
$2+3*2$	8
$(2+3)*2$	10

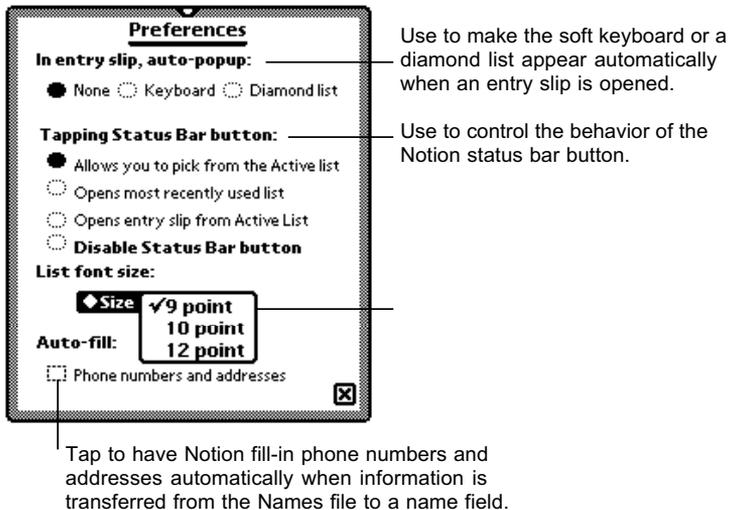
Notion supports the following mathematical operators (accessible by tapping the carat ▲ while in the formula editor):

<u>Symbol</u>	<u>Name</u>	<u>Definition</u>	<u>Examples</u>
+	Addition	Adds two values	2+2 Subtotal + Tax
-	Subtract	Subtracts the second value from the first-	2-2 Total - Discount
*	Multiplication	Multiplies each value	Subtotal * Tax Days * 0.01*Payment
/	Division	Divides the first value by the second	Miles driven/gallons Inches/12

## Preferences

To set Notion's preferences, tap the Info button and select Prefs.

With preferences, you can control these Notion functions:



The screenshot shows the 'Preferences' dialog box with the following settings and callouts:

- In entry slip, auto-popup:**  None  Keyboard  Diamond list. Callout: Use to make the soft keyboard or a diamond list appear automatically when an entry slip is opened.
- Tapping Status Bar button:**  Allows you to pick from the Active list  Opens most recently used list  Opens entry slip from Active List  Disable Status Bar button. Callout: Use to control the behavior of the Notion status bar button.
- List font size:** Size  9 point  10 point  12 point. Callout: (points to the list font size options)
- Auto-fill:**  Phone numbers and addresses. Callout: Tap to have Notion fill-in phone numbers and addresses automatically when information is transferred from the Names file to a name field.

- Use the auto-popup preference to make the keyboard or a diamond list appear when you open an entry slip.

- For quick access to Notion, a Notion icon can be placed in the Newton's status bar, which is the row of buttons that appear at the bottom of your backdrop application. You can use preferences to turn the button on and off and control it's function. You can use the button to pop-up a list of your lists to choose from, to open the most recently used list, or to open an entry slip from the most recent list without opening Notion.
- Choose between three font sizes: 9, 10, or 12 point. The font size will apply to the entire list, you cannot change font sizes from list item to item.
- Enable the Auto-fill feature to fill the address and phone fields when linking with the Name File.

## Routing

Newton's standard communication features are available in Notion's Routing button . The Routing button can also be used to duplicate or delete the open list.

### **Print, Fax, Beam, and Mail**

You can print, fax, beam, or mail any list or group of selected items via the Routing button. If you have items selected, they will be routed; otherwise, the entire list will be routed.

Note to MessagePad 120 users: If you are attempting to print a very long list, you may encounter memory problems. If so, reduce the number of items you are trying to print by selecting specific items to be printed. Using the Print Later feature may also prevent printing problems. For instructions on the Newton's printing features, see your Apple Message Pad user manual. You may also be able to improve printing performance by using a package freezing utility.

Warning: If you beam or mail a list to someone who doesn't have Notion, that person will be unable to put the list away from their In Box. To avoid this, export the list to the Notepad as described above, and then beam or mail the note, or mail the information using the Text Only option.

# Troubleshooting and Technical Support

If you have a problem with Notion, there are several techniques which you should try before calling for help. If the problem appears to be memory-related (you see the message “The application does not have enough memory to do what you asked”), you should try resetting your Newton by pushing the Reset button in the battery compartment. If the problem persists, consider purchasing a utility package which enables “package freezing”, a means of increasing available system memory.

If you encounter a memory problem while trying to print or fax, you might be able to resolve the problem by reducing the number of list items you wish to print. You may do this by selecting the specific list items in Notion, and then attempting to print. Using the “Print Later” feature to print after closing Notion can also help alleviate memory problems during printing. For instructions on the Newton’s printing features, see your Apple Message Pad user manual.

If the problem is not memory related, you should try resynchronizing Notion’s memory caches. This will force Notion to rebuild the open list, and also updates the active list.

To resynchronize Notion’s memory caches:

1. Tap the Info button.
2. Select About.
3. Tap the Notion version number in the upper-right corner of the About box.

## Technical Support

Visit our website for answers to frequently asked questions and update information:

**<http://www.pelicanware.com>**

If you problem and are unable to solve it using the manual or online help, or if you see a Newton error message (a sound and a notification saying “A problem has occurred” followed by a number, such as -48807), contact us. To help us answer your question, please have the following information ready:

1. Your Notion version number.
2. Your Newton Operating System version.
3. Steps to duplicate the problem you are encountering.

We are available at the following email addresses and phone numbers:

Internet:            support@pelicanware.com  
Voice:                503-221-1148  
Fax:                  503-224-0582

Our US Mail address is:

PelicanWare, Inc.  
506 SW 6th Ave. Suite 1100  
Portland, OR 97204

We hope you like using Notion 2.0!

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