Introduction to Compendium-PE

v 1.7.0   (non-proprietary documentation)

Portability Enhanced Functionality:

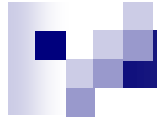What is it? How to use it.

What is Compendium-PE?

- PE = Portability Enhanced
  - Compendium plus some new functions to allow mapping anywhere, even if you're not at your desk!

- Allows access to a personal copy of all maps in the project when away from your office (not connected to the LAN or VPN)

- Allows you to merge any work you do on those maps back into the shared project when you return to the office LAN or connect through the VPN
  - Similar to Lotus Notes Offline / Online ("on the road") feature
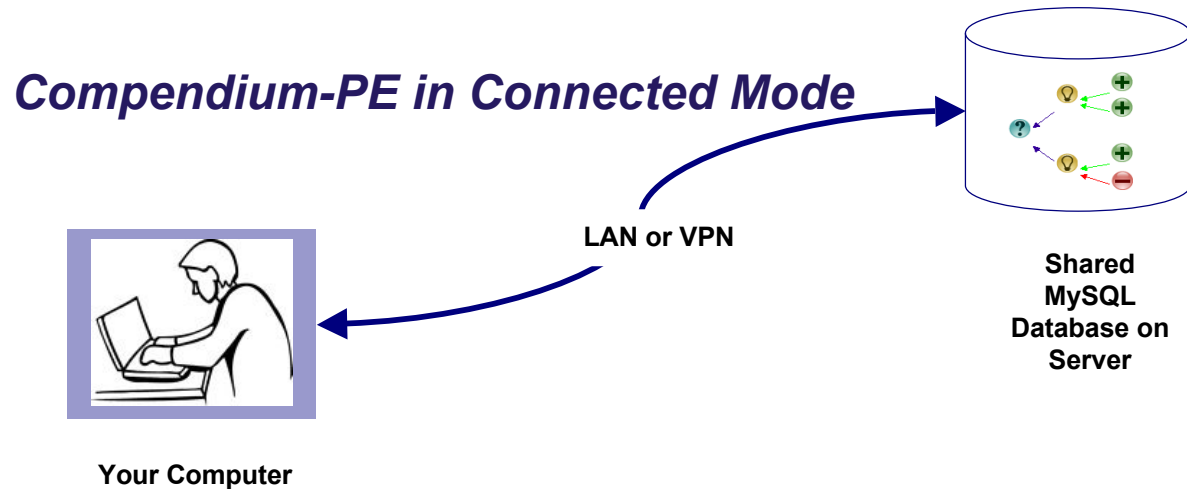
New Terminology in C-PE

- Three new terms
  - □ **Connected Mode**
    - Related words: shared (MySQL) Database
  - □ **Remote Mode**
    - Related words: personal copy (Derby) Database
  - □ **Sync** (Synchronization or Synchronize)
- You will work in either Connected Mode or Remote Mode
- Sync is how you get information from one database to the other

New Terminology in C-PE

- The next three slides provide an overview of this new terminology… with pictures!
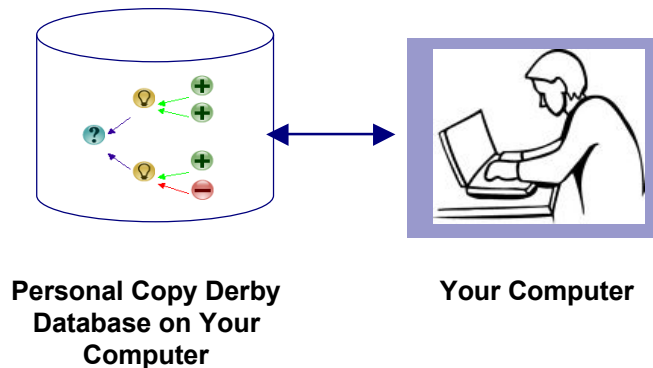
C-PE: Connected Mode Picture

Compendium-PE in Connected Mode

LAN or VPN

**Shared
MySQL
Database on
Server**

Your Computer

- Connected Mode is another way of saying "the way you've always used Compendium"
- In Connected Mode, the shared (MySQL) database is located on a server
    - This shared database may also be called a master database
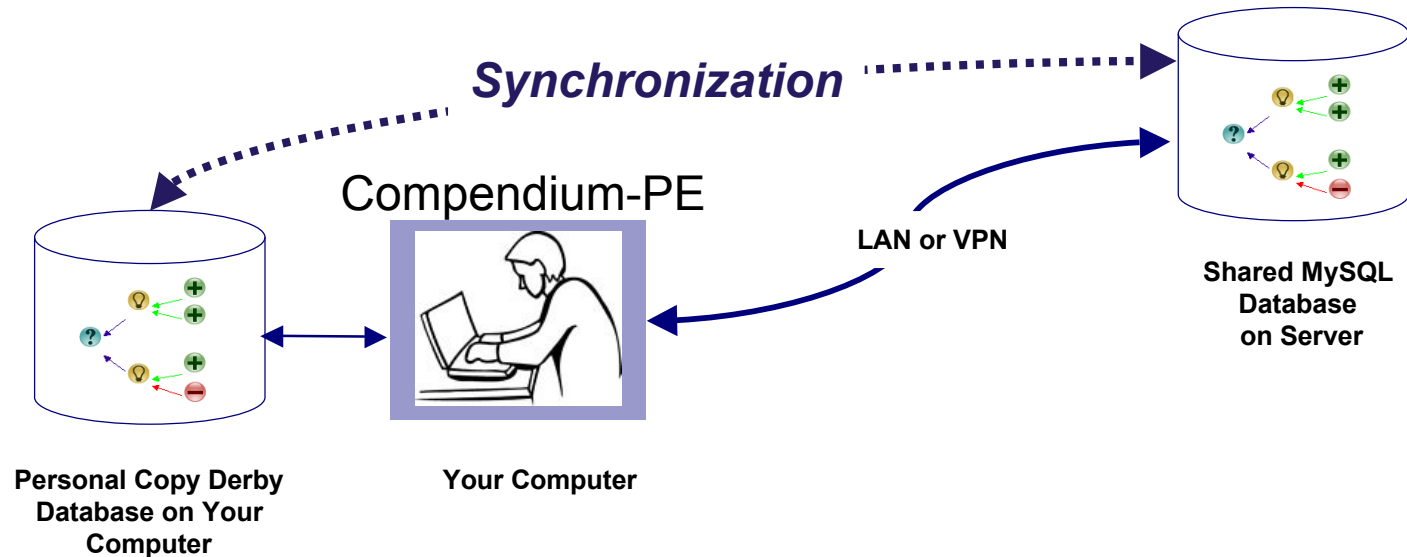- A LAN or VPN network connection is required for Connected Mode to work

C-PE: Remote Mode Picture

Compendium-PE in Remote Mode

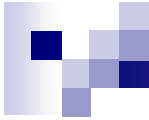**Personal Copy Derby Database on Your Computer**

Your Computer

- Remote Mode is new – it makes Compendium "portable"
- In Remote Mode, the personal copy (Derby) database is located on your computer
- Remote Mode will work even if you have no LAN or VPN network connection

C-PE: Synchronization Picture

Synchronization

Compendium-PE

LAN or VPN

Shared MySQL
Database
on Server

Personal Copy Derby
Database on Your
Computer

Your Computer

- Synchronization is the process used by Compendium-PE
  to make sure that the personal copy database on your
  computer and the shared database on the server have the
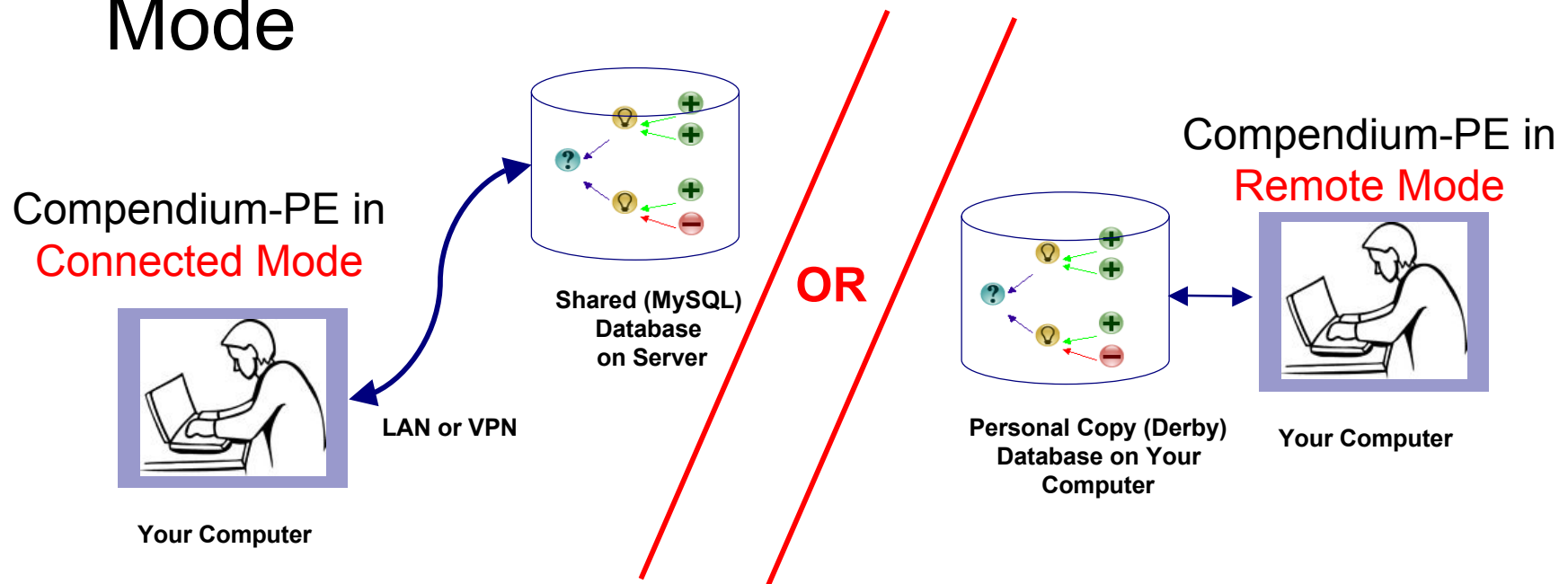 same information in them.

How to Use Compendium-PE

- The next set of slides will address using Compendium-PE:
  - ☐ Choosing Your Working Mode
    - When and why to use which!
  - ☐ Living in a Bi-modal World
    - Some considerations
  - ☐ Starting and Using Connected Mode
  - ☐ Starting and Using Remote Mode
  - ☐ Synchronizing
  - ☐ Special Situation: Conflicts in Synchronization

Choosing Your Working Mode

- When you start to use C-PE, the first step is to choose whether you want to work in Connected Mode or Remote Mode
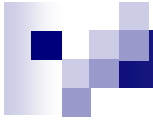
Compendium-PE in
Connected Mode

Shared (MySQL)
Database
on Server

OR

Compendium-PE in
Remote Mode

LAN or VPN

Personal Copy (Derby)
Database on Your
Computer

Your Computer

Your Computer

Choosing Your Working Mode - cont.

- In Connected Mode things work 'normally' … you are directly connected to the shared database (master database)

  - ☐ Pro: Any mapping that you or others do appears on everyone's screen within a few moments without requiring any special action

  - ☐ Pro: Any Cmails you send, or that others send you, arrive in their destination Inbox within a few moments

  - ☐ Con: If the network connection is slow, then Compendium is slow! Sometimes too slow to be useable.

Choosing Your Working Mode - cont.

- In Remote Mode you have 'cut the cord' to the shared database (master database)

  - □ Pro: You can do your mapping at high speed even with a poor connection or if you are off the network

  - □ Con: The mapping work you do, and any Cmail you send, isn't seen by others until you Synchronize

  - □ Con: The mapping work others do, and any Cmail they send you, isn't seen by you until you Synchronize

  - □ Con: If you forget to Synchronize, for others, *it is like the work you did never happened!*

Living in a Bi-modal World

- Remember…
  - Working in Remote Mode is like editing a Word document while you're on a plane flight… all that thinking is locked inside your computer until you make it available to others… using Sync!

Living in a Bi-modal World - cont.

■ Also…

- ☐ It's easy to forget to Sync
  - ■ BTW, helping with or automating this is on the "possible future features" list!

- ☐ Here are some signs that someone might have forgotten to sync
  - ■ You get a Compendium Inbox email, but there's no corresponding Cmail
  - ■ You send someone a Cmail to some nodes you added to a map, and when you check with them they say they can't find the nodes or the Cmail
  - ■ You do some mapping while you are on a trip, and when you get back to the office … the work you did is gone!
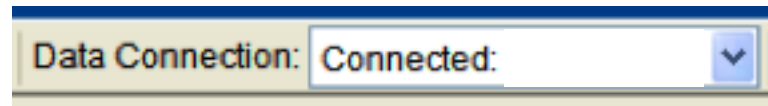
- ☐ **When in doubt, sync!**

Starting Connected Mode

- **Normal mode when at your desk**
  - ☐ Because you can immediately see changes made by others
  - ☐ Because there will be less confusion about state of the maps

- **To start, close C-PE, if it is open**
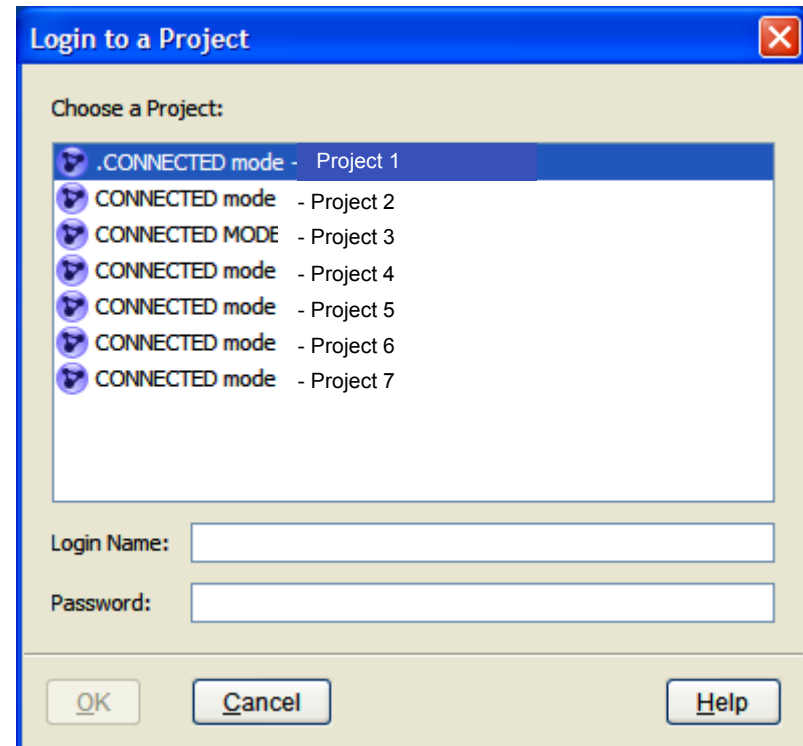- **Verify that you have a LAN or VPN connection**

Starting Connected Mode - cont.

- Open C-PE

- If the Login to a Project list starts with "REMOTE…", click on [Cancel]

- Change the Data Connection to "Connected:<your connection ID>"
  - You will find this at the bottom of your screen
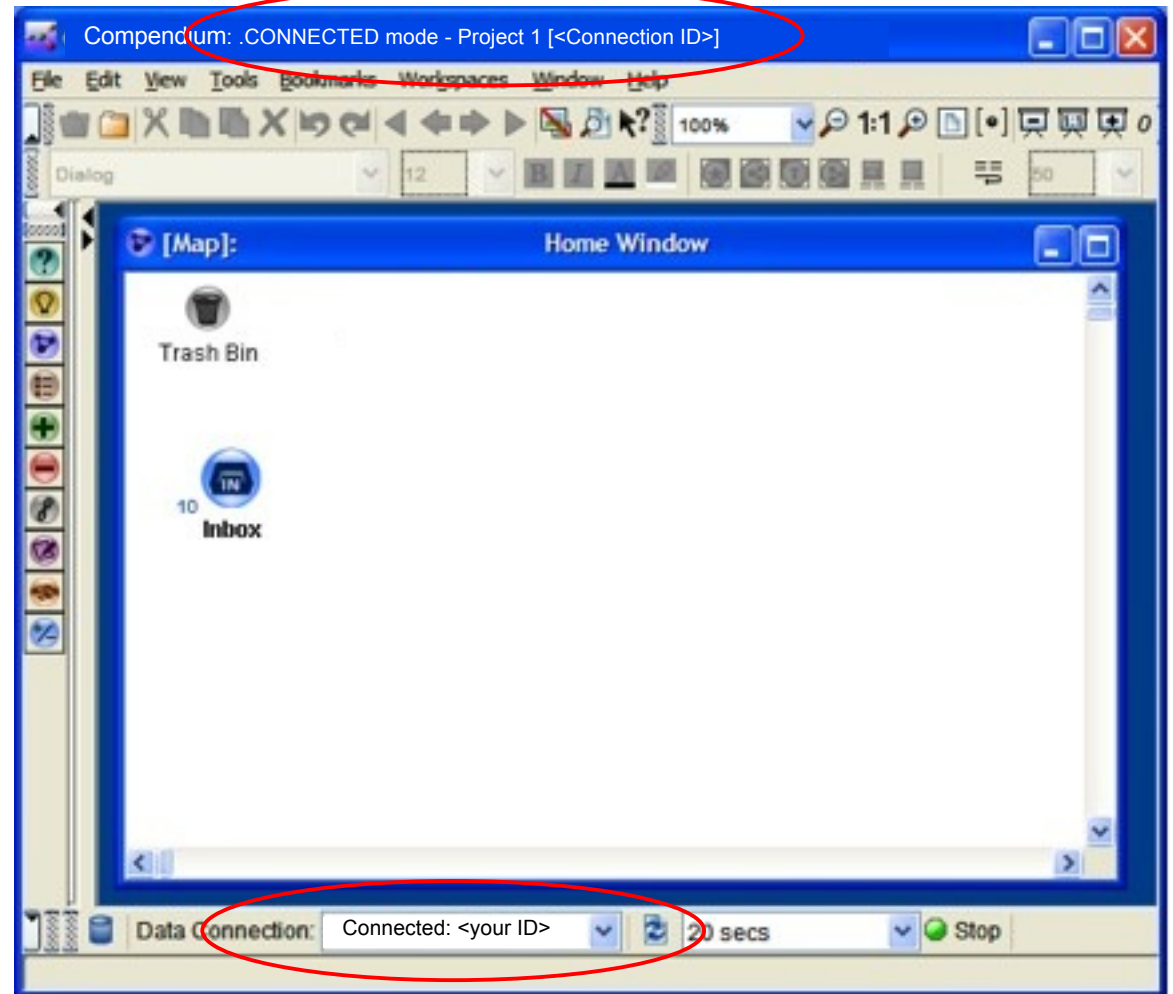

Data Connection: Connected:

Starting Connected Mode - cont.

- This dialog will be displayed
  - □ If it is not, go to the File menu and select Open
- Select the CONNECTED Mode project that you want to open and login as usual.

Login to a Project

Choose a Project:

- .CONNECTED mode - Project 1
- CONNECTED mode - Project 2
- CONNECTED MODE - Project 3
- CONNECTED mode - Project 4
- CONNECTED mode - Project 5
- CONNECTED mode - Project 6
- CONNECTED mode - Project 7

Login Name:

Password:

OK   Cancel   Help

Using Connected Mode:

- Title will read
  Compendium: CONNECTED mode - <project name>

- Data Connection will be
  Connected:<Connection ID>

- Compendium will operate normally, using the shared database (MySQL database)
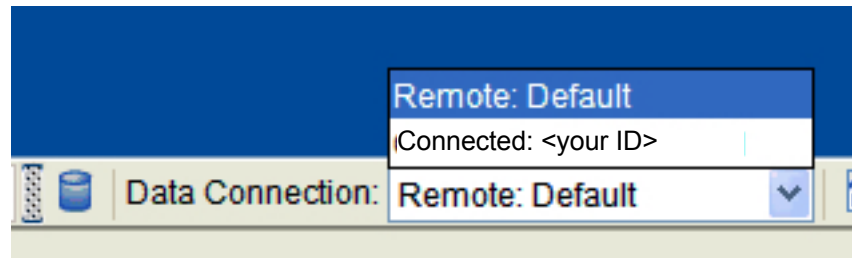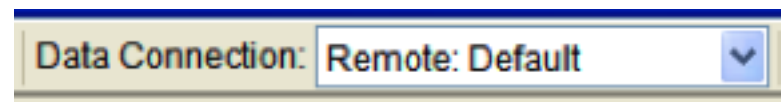

V8

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Starting Remote Mode

- Normal mode when away from your desk or away from the office
  - Because you can use it when you don't have any access to the shared database
  - Because you can use it when the network connection available is slow

- To start, close C-PE, if it is open

Starting Remote Mode - cont

- Open C-PE
- If the Login to a Project list has projects starting with "CONNECTED…", click on [Cancel]
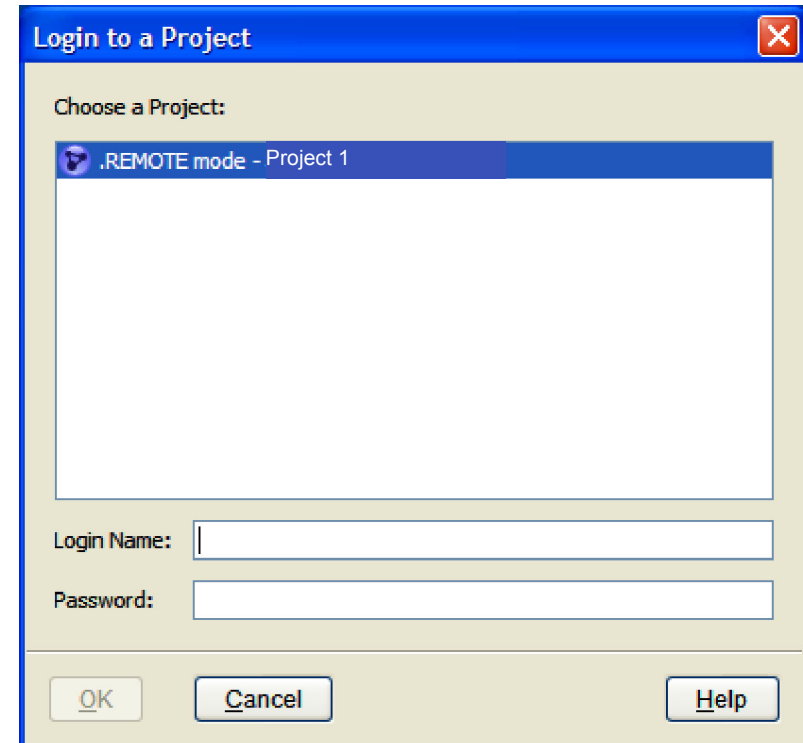- Change the Data Connection to "Remote: Default"

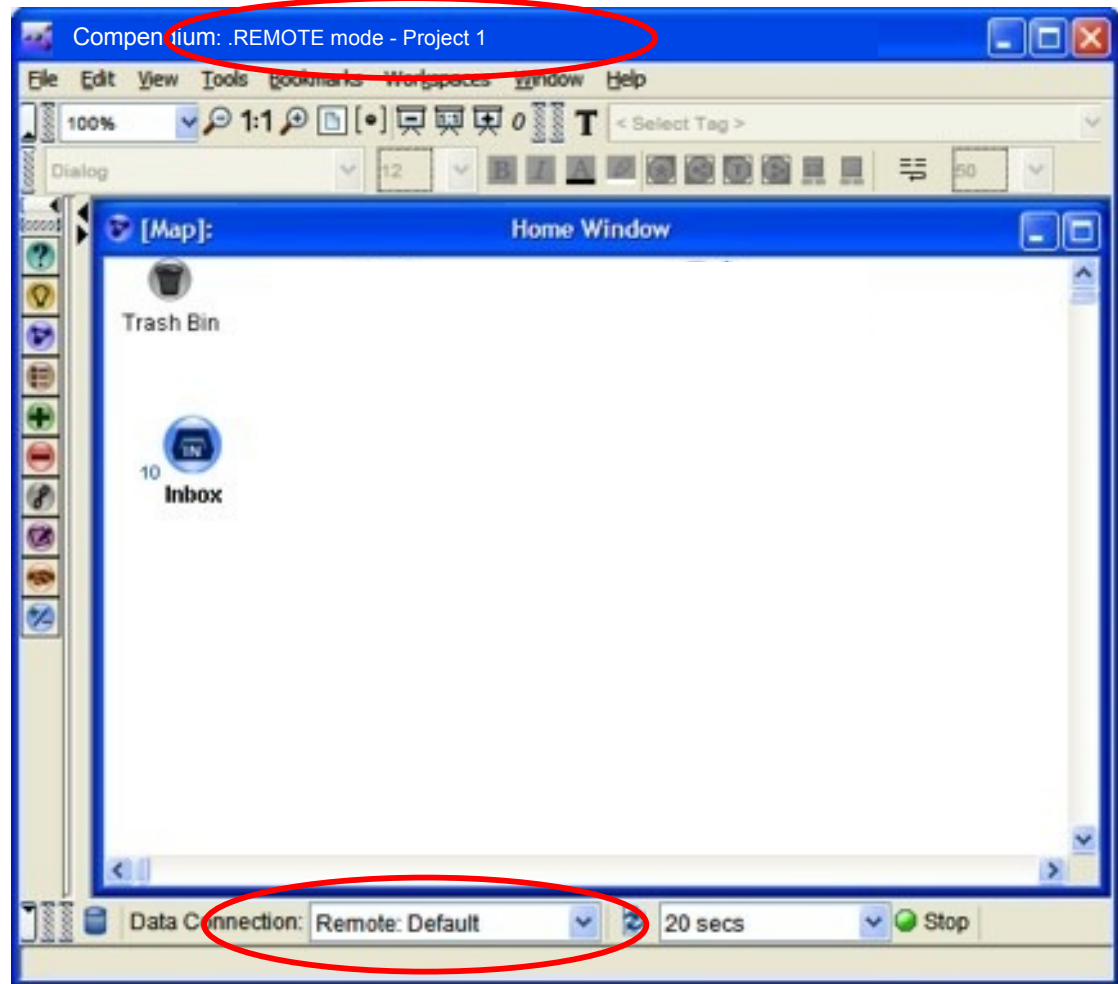- ☐ You will then see this at the bottom of your screen

Starting Remote Mode - cont

- **This dialog will be displayed**
  - ☐ If it is not, go to the File menu and select Open
- **Select the project that says REMOTE mode**
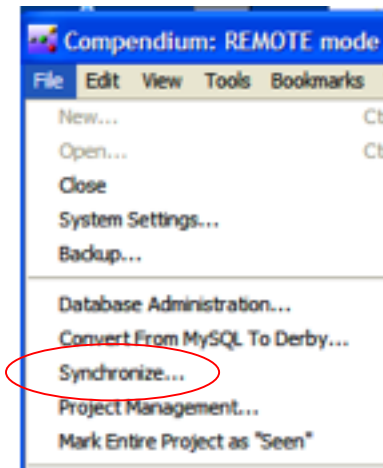- **Enter your usual login information (which may be automatically filled in)**

Login to a Project

Choose a Project:

.REMOTE mode - Project 1

Login Name:

Password:

OK   Cancel   Help

Using Remote Mode:

- **In Remote Mode**
  - ☐ Title will read **Compendium: REMOTE mode** - <project name>

  - ☐ Data Connection will say **Derby: Default**

- **Compendium operates normally, using your personal copy database**

- **No one sees the work you do unless you sync!**
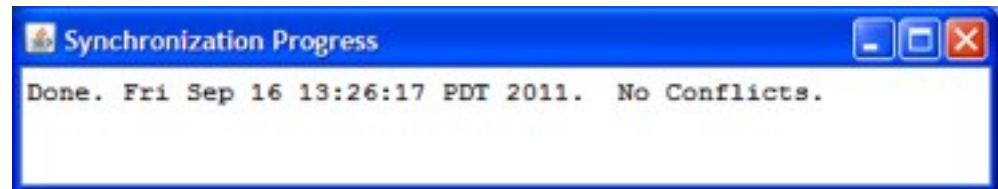
Synchronization

- **To synchronize, you must…**

  1. have a working LAN or VPN connection

  2. Be using Remote mode in C-PE

- **To start a synchronization, go to the File menu, and then select Synchronize**

Note: If the Synchronize menu entry is gray, you are not in Remote mode! Close C-PE, and log in again, in Remote mode.

Synchronization - cont

- **Click [Yes] to Sync: REMOTE mode … message**

- **Close [x] the Synchronization Progress dialog when it says Done.**

- **Once you have sync'd, you can disconnect from the LAN or VPN and use C-PE in Remote Mode**
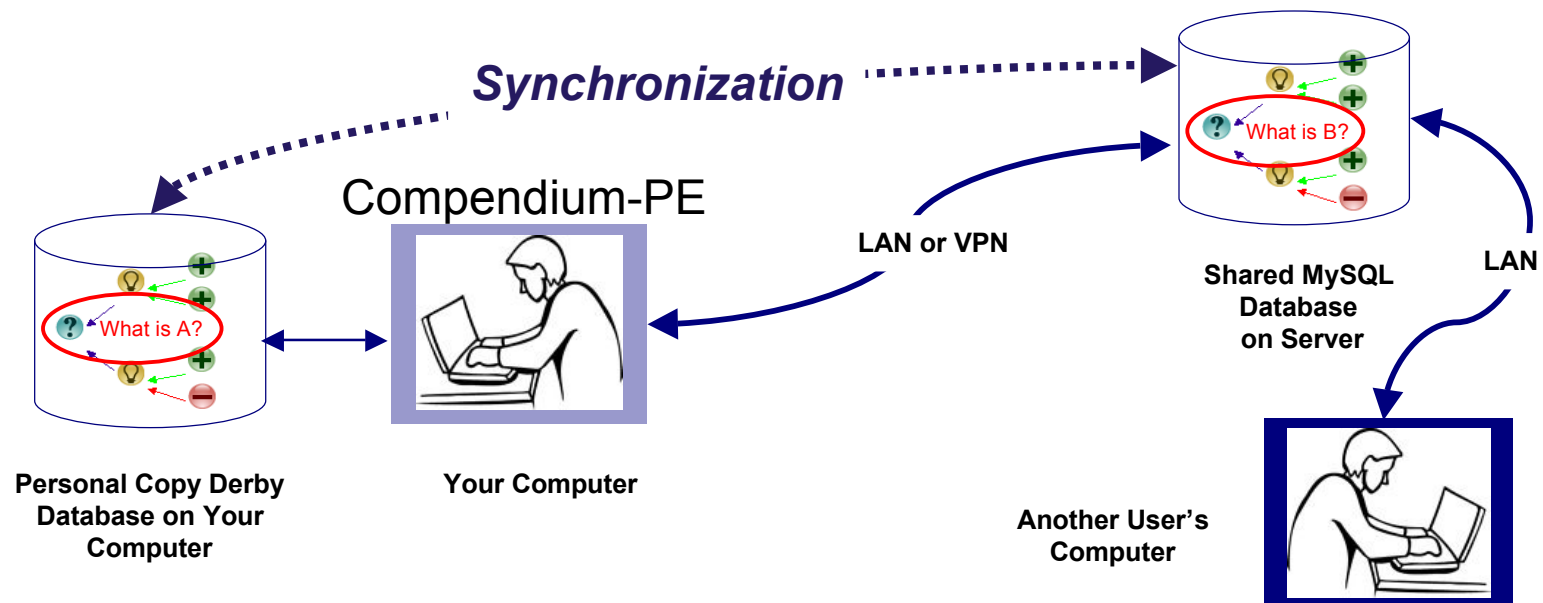
Synchronization Tip

- If you are going on a trip and there's a chance that you won't have an Internet connection along the way or when you arrive, you should Sync before you leave

- To sync before you leave
  - ☐ Start C-PE
  - ☐ Log into Remote mode
  - ☐ Synchronize
  - ☐ Exit C-PE

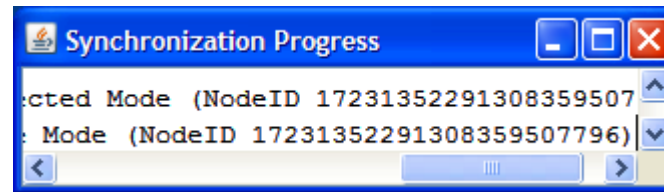# *Special Situation:* Conflicts in Synchronization

- ## What is a conflict?

  - ☐ On the rare occasion when two (or more) users make changes to the same node, a conflict can occur

Synchronization

Compendium-PE

LAN or VPN

LAN

What is A?

What is B?

Shared MySQL Database on Server

Personal Copy Derby Database on Your Computer

Your Computer
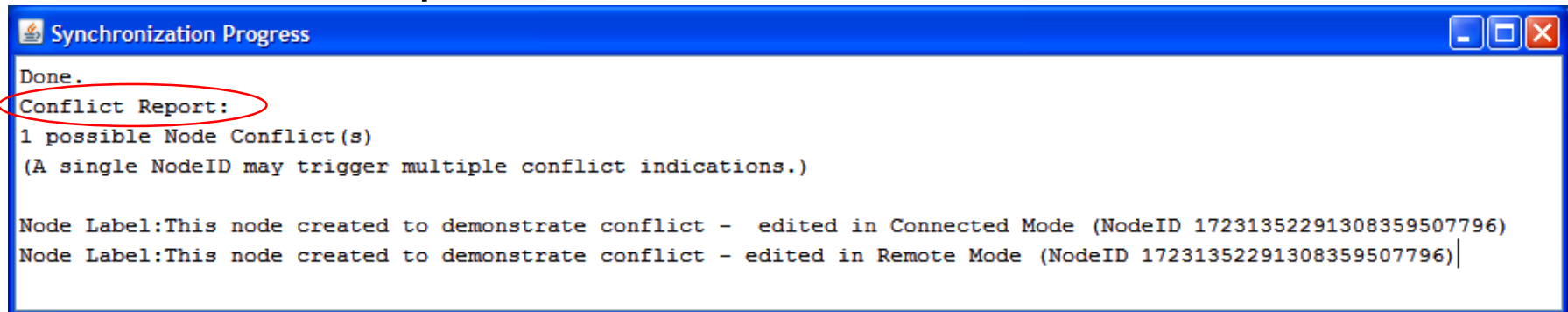
Another User's Computer

Conflicts in Sync - continued

- How do you know a conflict occurred?

  - Synchronization will produce a conflict report

- What will you see? Something like this:

- Click and drag the lower right corner to expand so that the whole report is visible:

Conflicts in Sync - continued

- The Conflict Report still needs some work to be really usable. However, this is a low priority issue as 'in real life' we have seen few conflicts.

Conflicts in Sync - continued

- **What happens when there is a conflict?**
  - ☐ If one person made a change to a node in Connected mode, and another made a change to the same node in Remote mode, the change made by the person in Connected mode is retained
    - ■ The change made to the same node in Remote mode will be "lost"
  - ☐ If both people were working in Remote mode, and changed the same node, the change made by whoever sync'd first will be retained
    - ■ The change made to the same node by the 2nd person to sync will be "lost"