Handbook for the Palm OS® Upgrade

with Mobile Connectivity

Copyright

Copyright © 2001 Palm, Inc. All rights reserved. Graffiti, HotSync, PalmConnect, PalmModem, and Palm OS are registered trademarks, and the HotSync logo, Palm, and the Palm logo are trademarks of Palm, Inc. Other product and brand names may be trademarks or registered trademarks of their respective owners.

Disclaimer and Limitation of Liability

Palm, Inc. assumes no responsibility for any damage or loss resulting from the use of this handbook.

Palm, Inc. assumes no responsibility for any loss or claims by third parties which may arise through the use of this software. Palm, Inc. assumes no responsibility for any damage or loss caused by deletion of data as a result of malfunction, dead battery, or repairs. Be sure to make backup copies of all important data on other media to protect against data loss.

IMPORTANT Please read the End User Software License Agreement with this product before using the accompanying software program(s). Using any part of the software indicates that you accept the terms of the End User Software License Agreement.

PN: 406-3903A-US

Contents

About This Book 1

Using hyperlinks 1

Chapter 1: Getting Started 3

What does my package include? 3

What else do I need? 4

Handheld requirements 4

Computer requirements 4

Mobile communications requirements 5

What's new for the handheld? 6

What's new for the Windows desktop? 7

What's new for the Mac desktop? 8

Installing desktop and handheld software 8

Windows computer installation 8

Mac computer installation 9

Installing the Web Clipping software 9

Windows computer installation 10

Mac computer installation 10

Installing the SMS software 11

Windows computer installation 11

Mac computer installation 12

Installing the MultiMail SE software 13

Windows computer installation 13

Mac computer installation 14

Chapter 2: Using the New Features for Your Handheld 15

Data entry 15

Security 15

Using passwords 16

Locking your handheld 17

Alarms and reminders 19

Send command 20

Address Book 20

Calculator 21
Note Pad 22
Reviewing notes 23
Clearing a note 24
Deleting a note 24
Setting an alarm for a note 24
Note Pad menus 26
Preferences 27
General Preferences 27
Date & Time Preferences 27
Connection Preferences 29
Network Preferences 30
Phone Preferences 31
Web Clipping Preferences 32

Chapter 3: Using the New Windows Desktop Features 35

Date Book 35
Day view 36
Week view 37
Month view 38
Year view 38
Address Book 39
List view 40
Business Card view 42
Large Icons and Small Icons views 43
To Do List 43
Memo Pad 46
List view 47
Large Icons and Small Icons views 48
Note Pad 49
Opening Note Pad 49
Viewing Note Pad notes 50
Showing, masking, and hiding private Note Pad notes 50
Copying Note Pad notes 50
Transcribing Note Pad notes to another application 50
Deleting Note Pad notes 51
Install Tool 51
Options command 52
General tab 52

Address Book tab 53
To Do tab 54
Alarms tab 55
Themes tab 56
Importing and exporting data 57
vCal files 58
vCard files 59
Security 60
HotSync Manager 61
Mail 62
Removing Palm Desktop software 63

Chapter 4: Using the New Mac Desktop Features 65
Install Tool 65
Note Pad 66
Opening Note Pad 66
Viewing Note Pad notes 66
Copying Note Pad notes 66
Transcribing Note Pad notes to another application 67
Deleting Note Pad notes 67
Showing, masking, and hiding private Note Pad notes 67

Appendix A: Troubleshooting 69

Index 71

About This Book

Welcome to the *Handbook for the Palm OS® Upgrade with Mobile Connectivity*. This handbook is designed to help you get up and running quickly with your new software.

This handbook walks you through the following:

- Installing the software
- Using the new handheld software features
- Using the new desktop software features on Windows and Mac computers
- Locating additional information about the Web Clipping, SMS, and MultiMail® SE software

Using hyperlinks

For your convenience, this handbook contains active hyperlinks.

To use the cross-reference hyperlinks:

- Click a cross-reference that appears in blue to jump directly to that section.

To use the hyperlinks to the Internet:

1. Connect to the Internet.
2. Open your web browser.
3. Click a web site address that appears in blue to jump directly to that web site.

CHAPTER 1

Getting Started

Congratulations on your purchase of the Palm OS® Upgrade with Mobile Connectivity. This package provides new software for your handheld, new desktop software for your computer, and a mobile communication solution for your handheld.

What does my package include?

The Palm OS Upgrade with Mobile Connectivity CD-ROM includes the following components:

New handheld software

This is the Palm OS software version 4.1 operating system, plus applications for your handheld. The features that are new to your handheld are described in Chapter 2 of this handbook.

New Windows desktop software

This is the desktop and synchronization software for a Windows computer. It includes Palm Desktop software 4.0 and more. The features that are new to the Windows desktop software are described in Chapter 3 of this handbook.

New Mac desktop software

This is the desktop and synchronization software for a Mac computer. It includes Palm Desktop software 2.6 and more. The features that are new to the Mac desktop software described in Chapter 4 of this handbook.

Web Clipping system files (PRC files) and applications (PQA files)

The system files enable you to submit and retrieve information from the Internet using your handheld, and a data-enabled mobile phone or a modem that is compatible with Palm OS software. The application files enable you to query the Internet for specific types of information. These applications are described in the *Guide to Web Clipping Applications* PDF file on the CD-ROM.

SMS messaging application

This application enables you to send and receive short text messages and data records using your handheld and a GSM mobile phone. This application is described in the *SMS Handbook* PDF file on the CD-ROM.

MultiMail® SE 1.0 This application enables you to send and receive Internet e-mail using your handheld, and a data-enabled mobile phone or a modem that is compatible with Palm OS software. This application is described in the *MultiMail® SE 1.0 Handbook* PDF file on the CD-ROM.

Documentation (PDF files) The documentation folder contains PDF files for the applications on the Palm OS Upgrade with Mobile Connectivity CD-ROM.

What else do I need?

The system requirements for Palm OS Upgrade with Mobile Connectivity are divided into three categories: handheld, computer, and mobile communications.

Handheld requirements

The handheld software is compatible with several Palm OS handhelds. If your handheld is not included in the following list, check with the manufacturer to see if the handheld is compatible before you install this software:

- Palm™ III, IIIx, IIIxe, IIIc
- Palm V, Vx

Computer requirements

To install and operate the desktop software, your computer system must meet the following requirements:

Minimum requirements: Windows computers

- IBM-compatible Pentium-class computer
- Windows NT/95/98/Me/2000
- 16MB RAM (64MB recommended with Windows 2000)
- 30MB available hard disk space
- VGA monitor or better
- CD-ROM drive
- Mouse
- One serial port or available USB port
- HotSync® cradle/cable (with either a serial or USB connector)

Minimum requirements: Mac computers

- Apple Mac computer or compatible with a Power PC processor
- Mac OS 8.6 to 9.x
- One serial port or available USB port
- 25MB available hard disk space
- 6MB free RAM
- HotSync cradle/cable (with either a serial or USB connector)

Optional equipment

- Printer (compatible with your computer and its operating system)
- Infrared communication port

Mobile communications requirements

To use the mobile communication features with your handheld, you need the following items:

- Handheld with Palm OS software 4.1 and at least 660K of available RAM.
- Mobile phone service provider that supports data services.
- One of the following items:
  - Data-enabled mobile phone with an infrared port (such as selected Nokia and Ericsson models, and other phones as available).
  - Data-enabled mobile phone with a cable that connects to your handheld (such as selected Sprint models).
  - Modem that is compatible with Palm OS software such as a PalmModem® accessory.
- To use the SMS application, you need a GSM phone and a mobile phone service provider that supports SMS messaging using GSM protocols. For information on GSM phones, contact your mobile phone service provider.
- To access the Internet, you need an ISP (Internet Service Provider) account with a dial-in number that supports your mobile phone's communication speed. This can be the same ISP account you use on your computer, or an ISP account provided by your mobile phone service provider.

What's new for the handheld?

Palm OS Upgrade with Mobile Connectivity includes Palm OS software version 4.1 and more. The many new features for your handheld include:

Enhanced keyboard	Enter Graffiti® characters or tap letters from the enhanced onscreen keyboard.
Auto lock feature	Set your handheld to lock automatically under specified conditions, and enter a hint to remind you of a forgotten password.
Multiple alarm reminder screen	View, clear, or snooze multiple alarms with a single tap.
Send command	Use this menu command to send Address Book entries or Date Book events with your mobile phone.
Note Pad application	Take notes in your own handwriting with this new application.
Address Book that dials	Initiate dialing numbers directly from Address Book.
Calculator	Calculate the square root of a number and perform calculations with larger numbers.
E-Mail support	Use Mail with a new list of desktop E-Mail applications.
Time zone support	Set your time zone and daylight savings settings from the same screen you set the date and time.
Phone driver support	Send instant text messages with data-enabled mobile phones and SMS software.

What's new for the Windows desktop?

Palm OS Upgrade with Mobile Connectivity includes Palm Desktop software 4.0 for Windows and more. The Windows desktop software has lots of new features and has undergone a complete transformation which gives it a new look and feel. Look for changes in the Windows desktop software in the following areas:

Date Book	Use the new yearly calendar for an overview of your schedule, and customize the views with adjustable panes and the Show/Hide Daily button.
Address Book	View your data in List, Business Card, Large Icons, or Small Icons format.
To Do List	Customize the screen with adjustable panes and the Show/Hide Details button.
Memo Pad	View your data in List, Large Icons, or Small Icons format.
Note Pad	Create notes on your handheld and view them on your computer with this new application.
Options command	■ Select default options for receiving vCal and vCard files. ■ Define custom field labels, default contact labels, and the label layout for your Address Book records. ■ Select To Do List display options. ■ Choose settings for alarms on your computer. ■ Customize the appearance of Palm Desktop software.
Importing and exporting data	Import and export electronic event records (vCal files), and business card records (vCard files).
Security	Hide and mask records marked as private with seamless integration with the security features on your handheld.
HotSync Manager	Perform HotSync operations with a USB cradle or cable. **NOTE** This feature requires a PalmConnect USB adapter (sold separately) and a Palm V or Palm III series handheld.

What's new for the Mac desktop?

Palm OS Upgrade with Mobile Connectivity includes Palm Desktop software 2.6 for Mac, plus a new application. Changes were made in the following areas:

Palm Desktop software 2.6 for Mac	This software was revised primarily for compatibility with Palm OS software 4.1.
Install Tool	The Install Handheld Files screen has a different look.
Note Pad	This new application enables you to create notes on your handheld and view them on your computer.

Installing desktop and handheld software

Before you install the desktop and handheld software, you need to know the model number of your handheld.

Windows computer installation

This section provides instructions on how to install the desktop and handheld software on a Windows computer.

To install the desktop and handheld software on a Windows computer:

1. Perform a HotSync operation using your existing desktop software.
2. (Optional) Create a copy of your old desktop software folder and its contents. Be sure to rename the copied folder (for example, Palm Old), and store it outside the desktop software folder.
3. Insert the CD-ROM into your computer's CD-ROM drive.

   TIP If installation does not begin, click the Windows Start button, click Run, enter D:\autorun.exe, and then click OK. If necessary, replace D: with the drive letter assigned to your CD-ROM drive.

4. If the Choose Setup Language dialog box appears, select the language you use for your handheld and your desktop software.

   IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your desktop software, repeat the installation process and select the appropriate language.

5. When the Palm OS Upgrade menu appears, select Palm OS 4.1 Upgrade.
6. Select your handheld model.

7. Follow the onscreen instructions to complete the desktop software installation.
8. Follow the onscreen instructions to complete the handheld software installation.
9. Accept the default Flash Tool Settings unless you are an advanced user.

Mac computer installation

This section provides instructions on how to install the desktop and handheld software on a Mac computer.

To install the desktop and handheld software on a Mac computer:

1. Perform a HotSync operation using your existing desktop software.
2. (Optional) Create a copy of your old desktop software folder and its contents. Be sure to rename the copied folder (for example, Palm Old), and store it outside the desktop software folder.
3. Insert the CD-ROM into your computer's CD-ROM drive.
4. Double-click the Palm Desktop Installer icon on your desktop.
5. If the Choose Setup Language dialog box appears, select the language you use for your handheld and desktop software.

IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your desktop software, repeat the installation process and select the appropriate language.

---

6. Follow the onscreen instructions to complete the desktop software installation.
7. Double-click the OS Upgrade Utilities icon on your desktop.
8. Double-click the icon for your handheld model.
9. Accept the default Flash Tool Settings unless you are an advanced user.

Installing the Web Clipping software

This section provides instructions for installing the Web Clipping software on your handheld.

Before you install the Web Clipping software, you need to do the following:

- Install the desktop and handheld software from the CD-ROM
- Know the name of your ISP (Internet Service Provider)
- Know the dial-in phone number for your ISP
- Know your user name and password for your ISP account

Windows computer installation

This section provides instructions on how to install the Web Clipping software on a Windows computer.

To install the Web Clipping software from a Windows computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.

   TIP If installation does not begin, click the Windows Start button, click Run, enter D:\autorun.exe, and then click OK. If necessary, replace D: with the drive letter assigned to your CD-ROM drive.

3. If the Choose Setup Language dialog box appears, select the language you use for your handheld and desktop software.

   IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your Web Clipping software, repeat the installation process and select the appropriate language.

4. When the Palm OS Upgrade menu appears, select Web Clipping.
5. Click Install.
6. When the agreement screen appears, click Yes.
7. Follow the onscreen instructions to enter the ISP configuration information you gathered before you started the installation.
8. After the installation finishes, perform a HotSync operation to install the Web Clipping software on your handheld.

Mac computer installation

This section provides instructions on how to install the Web Clipping software on a Mac computer.

To install the Web Clipping software from a Mac computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.
3. Double-click the Mobile Connectivity Software icon on your desktop.
4. If language folders appear, double-click the folder for the language you use on your handheld.

IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your Web Clipping software, repeat the installation process and select the appropriate language.

5. Double-click the Web Clipping icon.
6. Perform a HotSync operation to install the Web Clipping software on your handheld.
7. Enter your dial-up network information on the Network Preferences screen on your handheld. See the *Guide to Web Clipping Applications* PDF file for instructions.

Installing the SMS software

This section provides instructions for installing the SMS software on your handheld.

Before you install the SMS software, you need to do the following:

- Install the desktop and handheld software from the CD-ROM
- Know the brand and model number of your GSM phone
- Determine whether you will connect to your phone using IrDA (infrared) or a serial phone cable

Windows computer installation

This section provides instructions on how to install the SMS software on a Windows computer.

To install the SMS software from a Windows computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.

   TIP If installation does not begin, click the Windows Start button, click Run, enter D:\autorun.exe, and then click OK. If necessary, replace D: with the drive letter assigned to your CD-ROM drive.

3. If the Choose Setup Language dialog box appears, select the language you use for your handheld and desktop software.

IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your SMS software, repeat the installation process and select the appropriate language.

4. When the Palm OS Upgrade menu appears, select SMS.
5. Click Install.
6. Follow the onscreen instructions to enter the configuration information you gathered before you started the installation.

   NOTE If you do not see a driver for your phone, select Not Listed to install a generic GSM driver. After you finish the installation, check your phone manufacturer's web site for a driver that is compatible with Palm OS software. Download the driver and install it on your handheld. See your handheld's handbook for instructions on installing applications.

7. Perform a HotSync operation to install SMS on your handheld.
8. When prompted, tap Reset to complete the installation.

   NOTE Tapping this button performs a soft reset, and will not erase your data.

Mac computer installation

This section provides instructions on how to install the SMS software on a Mac computer.

To install the SMS software from a Mac computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.
3. Double-click the Mobile Connectivity Software icon on your desktop.
4. If language folders appear, double-click the folder for the language you use on your handheld.

IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your SMS software, repeat the installation process and select the appropriate language.

5. Double-click the SMS icon.

6. Perform a HotSync operation to install SMS on your handheld.
7. Enter the information for your phone on the Phone Preferences screen on your handheld. See the *SMS Handbook* PDF file for instructions.

Installing the MultiMail SE software

This section provides instructions for installing the MultiMail SE software.

Before you install the MultiMail SE software, you need to do the following:

- Install the desktop and handheld software from the CD-ROM

Windows computer installation

This section provides instructions on how to install the MultiMail SE software on a Windows computer.

To install the MultiMail SE software from a Windows computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.

   TIP If installation does not begin, click the Windows Start button, click Run, enter D:\autorun.exe, and then click OK. If necessary, replace D: with the drive letter assigned to your CD-ROM drive.

3. If the Choose Setup Language dialog box appears, select the language you use for your handheld and desktop software.

   IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your MultiMail SE software, repeat the installation process and select the appropriate language.

4. When the Palm OS Upgrade menu appears, select MultiMail.
5. Click Install.
6. Perform a HotSync operation to install MultiMail SE on your handheld.
7. Configure the MultiMail mail server settings on your handheld. See the *MultiMail® SE 1.0 Handbook* PDF file for instructions.

Mac computer installation

This section provides instructions on how to install the MultiMail SE software on a Mac computer.

To install the MultiMail SE software from a Mac computer:

1. Perform a HotSync operation.
2. Insert the CD-ROM into the CD-ROM drive.
3. Double-click the Mobile Connectivity Software icon on your desktop.
4. If language folders appear, double-click the folder for the language you use on your handheld.

IMPORTANT Choosing a language that does not match your handheld is not recommended or supported, and can result in data loss. If you need to reselect a language for your MultiMail SE software, repeat the installation process and select the appropriate language.

---

5. Double-click the MultiMail icon.
6. Perform a HotSync operation to install MultiMail SE on your handheld.
7. Configure the MultiMail modem and mail server settings on your handheld. See the *MultiMail® SE 1.0 Handbook* PDF file for instructions.

CHAPTER 2

Using the New Features for Your Handheld

This chapter explains how to use the new handheld software features. This chapter assumes that you are already familiar with the features in version 3.5 of Palm OS software, and highlights the differences between that handheld software and the handheld software included with this product.

Data entry

You can enter data on your handheld using Graffiti® characters, or using the onscreen keyboard.

What's changed?

Past. You could not enter Graffiti characters while using the onscreen keyboard.

Present. You can enter Graffiti characters from the onscreen keyboard screen.

Security

The security features enable you to use passwords, and to lock your handheld to prevent unauthorized users from accessing your data.

Using passwords

Passwords help you maintain your privacy. If you assign a password, you must enter it to access hidden or masked records and to unlock your handheld.

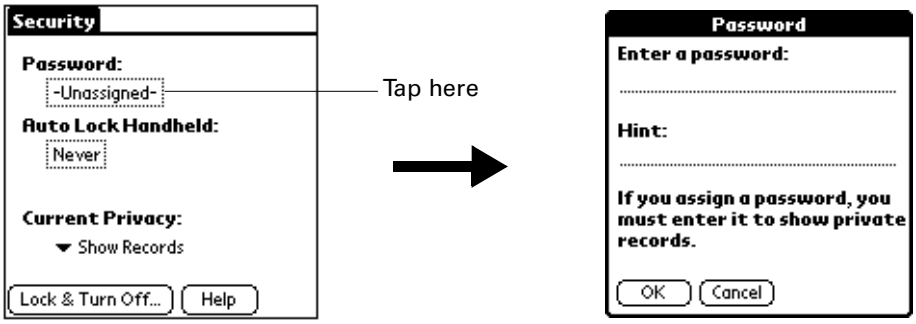
What's changed?

Past. If you forgot your password, you needed to delete the password and all private entries were deleted with it. If you locked your handheld and forgot your password, you had to perform a hard reset.

Present. You can minimize the risk of forgetting your password by entering a hint to help you remember a forgotten password. If the hint doesn't help you remember the password, the recovery process is the same as it was in the past.

To enter a password hint:

1. Tap the Applications icon .
2. Tap the Security icon .
3. Tap the Password box.



4. Enter a new password.

   NOTE If you already have a password, you must first enter your existing password to make any changes or assign a hint. After you enter your password, the Password dialog box that appears differs slightly from the one shown here.

5. Enter a hint to help your remember your password if you forget it.
6. Tap OK.
7. Enter the same password a second time.
8. Tap OK.

Locking your handheld

You can lock your handheld so that it cannot be operated until you enter your password. In the event that your handheld is lost or stolen, this feature helps protect your data from unauthorized use. You can set your handheld to lock automatically, or you can lock it manually.

What's changed?

Past. You had to manually lock and turn off your handheld.

Present. You can set your handheld to lock automatically when any one of the following occurs:

- When you turn off the power
- At a time that you specify
- After a period of inactivity that you specify

IMPORTANT If you lock your handheld, you must enter the exact password to re-activate your handheld. If you forget the password, your handheld presents the hint you entered to help you remember the password. If you still cannot remember the password, you must perform a hard reset to resume using your handheld. Performing a hard reset deletes all the records in your handheld; however, you can restore all synchronized data during the next HotSync® operation.

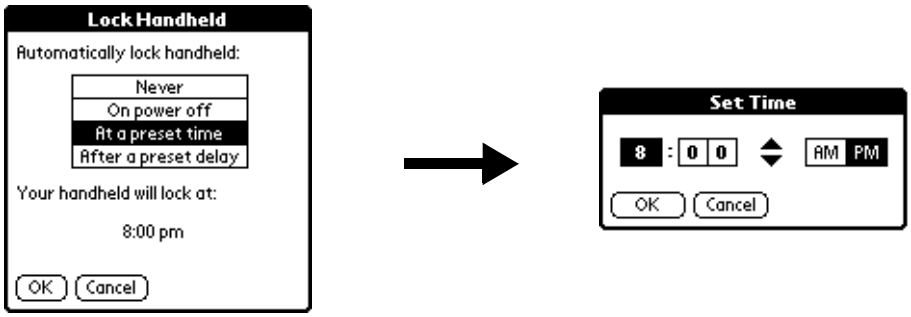
To set your handheld to lock when you turn off the power:

1. Tap the Applications icon .
2. Tap the Security icon .
3. Tap the Auto Lock Handheld box, and then enter your password.

4. Tap On power off.
5. Tap OK.

To set your handheld to lock at a preset time:

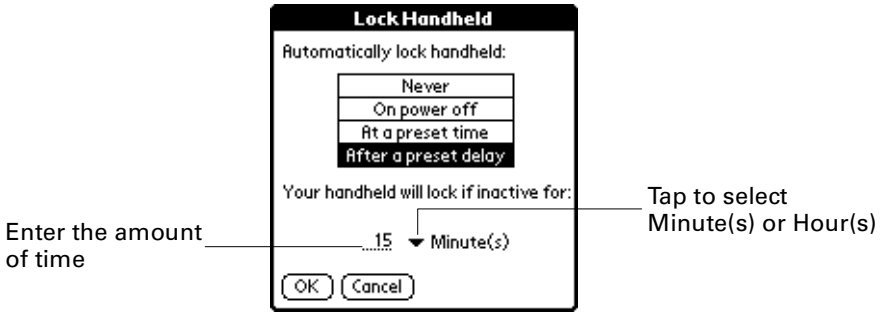
1. Tap the Applications icon .
2. Tap the Security icon .
3. Tap the Auto Lock Handheld box, and then enter your password.
4. Tap At a preset time, and then use the arrows to set the time.



5. Tap OK.

To set your handheld to lock after a preset delay:

1. Tap the Applications icon .
2. Tap the Security icon .
3. Tap the Auto Lock Handheld box, and then enter your password.
4. Tap After a preset delay.



5. Enter the inactive period, then select Minute(s) or Hour(s) from the pick list.
6. Tap OK.

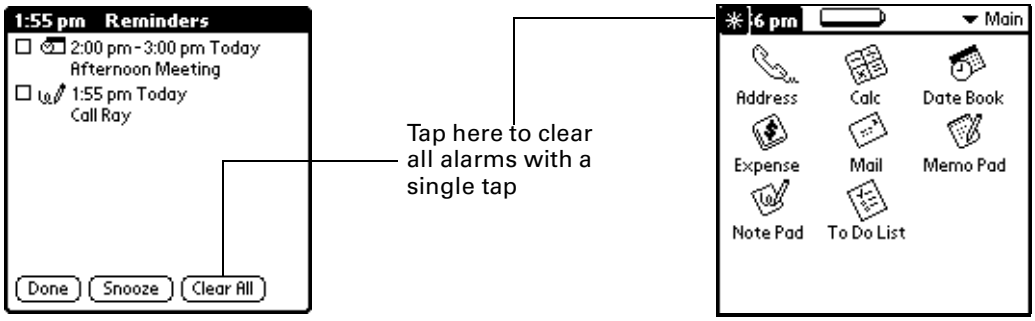
Alarms and reminders

The Alarm setting enables you to set an alarm for Date Book events and Note Pad notes. When the alarm occurs, a reminder message appears onscreen.

What's changed?

Past. Alarm reminders offered two options: OK and Snooze.

Present. Alarm reminders offer three options: OK, Snooze, and Go To. The new Go To option displays the event associated with the alarm. If you tap Snooze in response to an alarm message, your handheld reminds you of the alarm again in five minutes, and an attention indicator blinks in the upper-left corner of the screen to remind you of the pending alarm. The Reminders screen displays alarms that are waiting for attention and you can clear all alarms with a single tap.



To respond to reminders, do one of the following:

- Select the check box for the item you want to clear.
- Tap an item (either the icon or the text description) to open the application where the alarm was set. The application opens to the entry associated with the alarm.
- Tap Done to close the reminder list and return to the current screen. An attention indicator blinks in the upper-left corner of the screen; tap it to view the reminder list again.
- Tap Snooze to see the list again in five minutes.
- Tap Clear All to dismiss all reminders in the list.

NOTE If you tap Done or Snooze and view the reminder list later, the current time displays in the Reminder bar and the original alarm time displays with each list item.

Send command

The send command is new to this version of software. This command enables you to use the SMS software and wireless communication features to send data from an application on your handheld using a data-enabled mobile phone. For example, you can send a Date Book event to someone to invite them to a party. If the recipient receives the message on a Palm OS handheld, they can transfer the message directly to the appropriate application.

IMPORTANT You must install the SMS software on your handheld to use the Send command. See "Installing the SMS software" in Chapter 1 for instructions.

To send data from another application:

1. Open the record you want to send.
2. Tap the Menu icon .
3. Tap Record, and then tap Send record. (The word record is replaced with event, address, item, note, or memo based on the application.)

4. Tap To to select from a list of recent recipients, or tap Lookup to select a number from your Address Book.
5. Tap Send.

Address Book

Address Book enables you to keep names, addresses, phone numbers, and other information about your personal or business contacts.

What's changed?

Past. Address Book stored phone numbers, but you could not dial numbers directly from this application.

Present. Address Book includes a Dial menu command that enables you to send the telephone number through the IR port on your handheld to an infrared-equipped mobile phone, or with a special cable that connects to your mobile phone, to initiate dialing.

To dial a number from Address Book:

1. Install the phone driver for your infrared-equipped or cable-equipped mobile phone on your handheld.

   NOTE If you installed the SMS software, the phone driver is already installed on your handheld.

2. Set up the Phone Preferences for the driver you installed in step 1.
3. Select the Address Book record containing the number you want to dial.
4. Tap the Menu icon .
5. Tap Record, and then tap Dial.

6. Select the number you want to dial.
7. If you are using an infrared-equipped mobile phone, make sure your phone is on and that infrared communication is enabled.
8. Point the IR port on your handheld at the IR port on your phone.
9. Tap Dial.

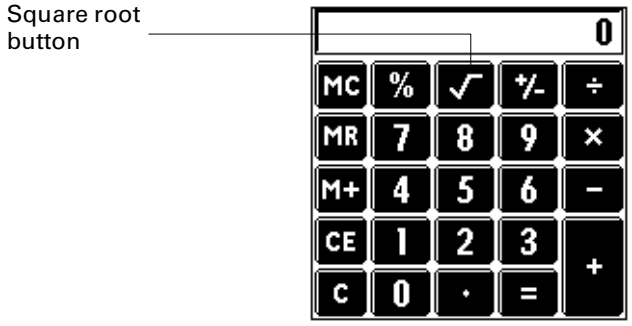
Calculator

Calculator helps you perform basic math calculations.

What's changed?

Past. Calculator included addition, subtraction, multiplication, division, and sign reversal buttons.

Present. Calculator has a new look and feel, handles more digits, and includes a square root button.



To calculate a square root:

1. Enter the number for which you want to find the square root.
2. Tap the square root button.

Note Pad

Note Pad is a new application. This application provides a place to take notes in your own handwriting. You can use Note Pad to do everything you might do with a piece of paper and a pencil. A record in Note Pad is called a "note." You can assign each note a title and even set an alarm to remind you of your note.

In Note Pad, you can do the following:

- Take notes, draw a sketch, or write any kind of message directly on your handheld screen. Later, you can enter this information into other applications on your computer.
- Set an alarm to use your notes as reminder messages.
- Assign notes to categories so that you can organize and view them in logical groups.
- Synchronize with your computer and use the Note Pad desktop software to copy and paste notes into popular desktop applications like Microsoft Word.

To open Note Pad:

1. Tap the Applications icon .
2. Tap the Note Pad icon .

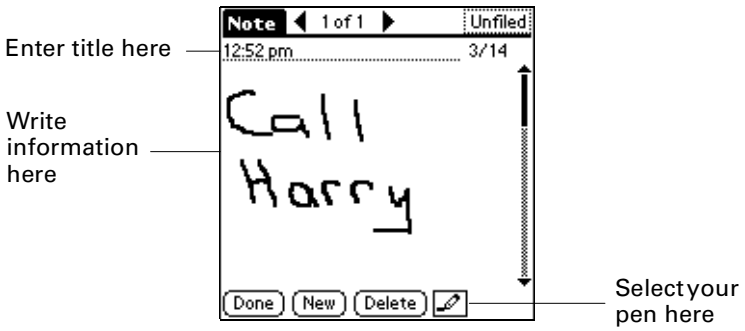
Note Pad opens a new note so that you can begin writing immediately.

TIP For quicker access, use the Buttons Preferences screen to assign Note Pad to a button on your handheld.

To create a new note:

1. Open Note Pad.

   TIP If Note Pad is already running, tap New.



2. Write the information directly on the handheld screen.

   TIP Tap the pen selector to choose a different pen width, or choose the eraser to remove unwanted strokes.

3. (Optional) Select the time at the top of the screen (this is the default title), and enter a title using Graffiti writing.

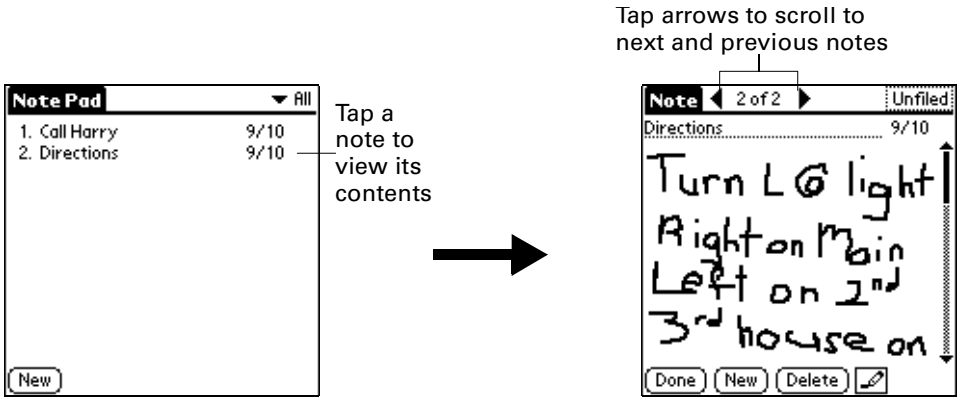
4. Tap Done.

Reviewing notes

The note title and the date you created the note appear in the Note Pad list. If you did not assign a title to your note, the time you created the note appears as the note title. This makes it easy to locate and review your notes.

To review a note:

1. In the Note Pad list, tap the note title.



2. Review or edit the contents of the note.

3. Tap Done.

Clearing a note

You can erase the drawing area in a note while retaining the note title.

To clear a note:

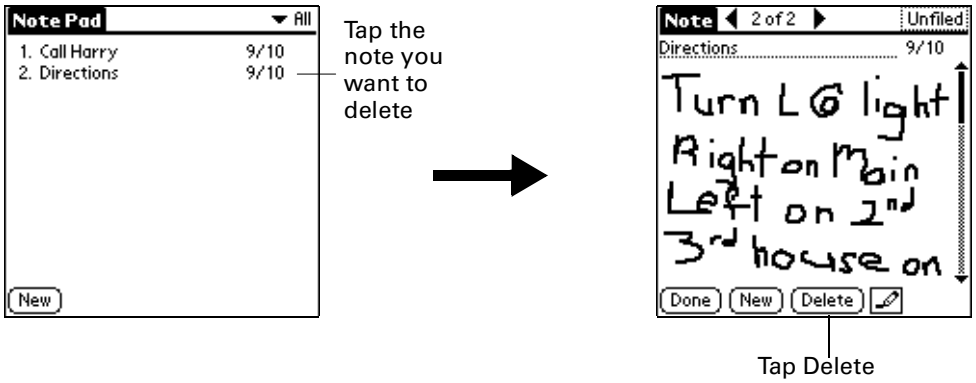
1. In the Note Pad list, tap the note title.
2. Tap the Menu icon .
3. Tap Edit, and then tap Clear Note.

Deleting a note

You can delete an entire note including the note title.

To delete a note:

1. In the Note Pad list, tap the note title.



2. Tap Delete.
3. Tap OK to confirm deletion.3
4. Tap Done.

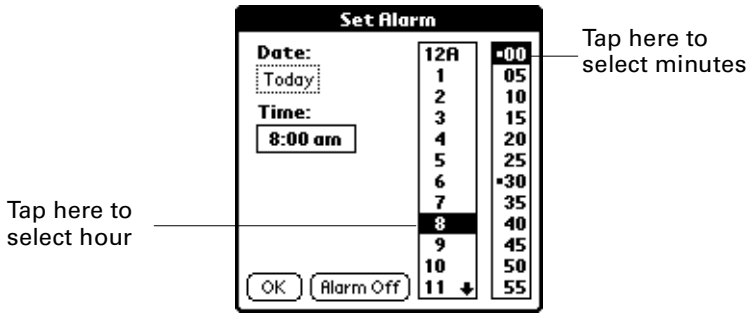
Setting an alarm for a note

You can set an alarm for a specific time and date to remind you to follow-up on a note.

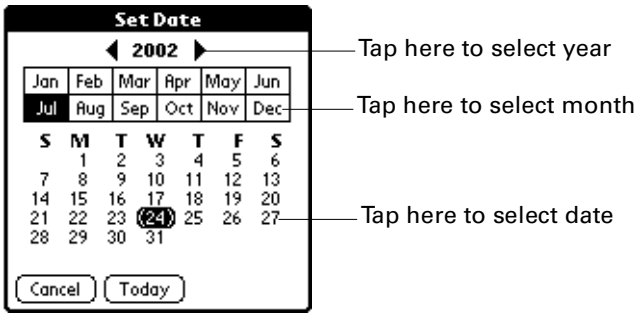
To set an alarm for a note:

1. Tap the note for which you want to assign an alarm.
2. Tap the Menu icon .
3. Tap Options, and then tap Alarm.
4. Tap the Time box.

5. Tap the hour and minute columns to select the time you want the alarm to occur.



6. Tap the Date box.



7. Tap the year, month, and date you want the alarm to sound.

   After you tap the date, the Set Alarm dialog box reappears.

8. Tap OK.

9. When the alarm goes off and the reminder message appears on screen, do one of the following:

   – Tap OK to permanently dismiss the reminder and return to the current screen.

   – Tap Snooze to dismiss the reminder and return to the current screen. The reminder message appears again in five minutes, and an attention indicator blinks in the upper-left corner of the screen to remind you of the pending alarm. When the reminder message reappears, the current time displays in the Reminder bar and the note title displays on the screen.

NOTE If you did not title the note, the time the note was created displays on the screen.

Tap Go To to open Note Pad. Note Pad opens and displays the note associated with the alarm.

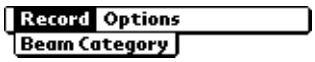
Note Pad menus

This section shows Note Pad menus for your reference, and includes Note Pad features that are not explained elsewhere in the handbook that comes with your handheld.

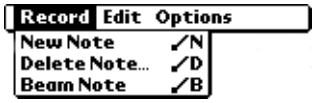
See the handbook that comes with your handheld for information about choosing menu commands.

The Record and Options menus differ depending on whether you're displaying the Note Pad list or an individual note.

Record menus



Note list



Note view

Options menus

Note list

Note view

Preferences Displays the Note Pad Preferences dialog box, where you define the sort order for notes and the alarm sound.

Details Displays the Note Details dialog box where you can assign the selected note to a category or mark the note as private.

About Note Pad Shows version information for Note Pad.

Preferences

The Preferences screens enable you to customize the configuration options on your handheld. There are changes to existing Preferences screens, and some new Preferences screens.

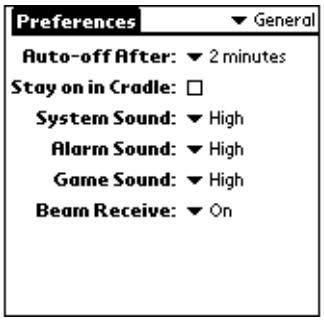
General Preferences

The General Preferences screen enables you to set the auto shutoff interval, alarm options, sounds for your handheld, and the Beam Receive feature.

What's changed?

Past. General Preferences enabled you to set the date and time, the auto shutoff interval, the Stay on in Cradle feature, the Beam Receive feature, and the system, alarm, and game sounds.

Present. The date and time settings are no longer located on the General Preferences screen; these settings are now located on the Date & Time Preferences screen.



Date & Time Preferences

The Date & Time Preferences screen enables you to set the date, time, time zone, and Daylight Saving option on your handheld.

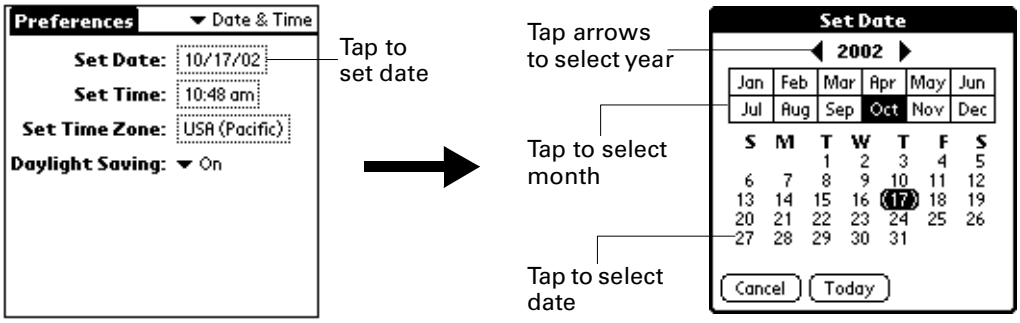
What's changed?

Past. Date and time settings were located on the General Preferences screen.

Present. Date and time settings are now located on the Date & Time Preferences screen, and additional options enable you to select a time zone and daylight savings settings.

To set the date:

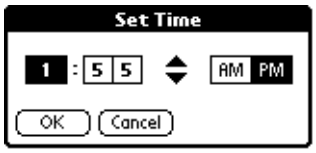
1. Tap the Set Date box.



2. Tap the arrows to select the current year.
3. Tap a month.
4. Tap the current date.

To set the time:

1. Tap the Set Time box.



2. Tap the up or down arrows to change the hour.
3. Tap each number of the minute, and then tap the arrows to change them.
4. Tap OK.

To set the time zone:

1. Tap the Set Time Zone box.

2. Tap a time zone.

TIP When you travel, changing the time zone setting to a new time zone automatically resets the date and time on your handheld, but it does not change the time of appointments set in Date Book.

3. Tap OK.

To set the daylight saving switch:

- Tap the Daylight Saving pick list, and then tap Off or On.

Connection Preferences

The Connection Preferences screen enables you to define the settings used to connect your handheld to other devices. The screen displays a list of available configurations that are ready to be further defined; the list varies depending on the kind of software you've added to your handheld. You can also create custom configurations.

What's changed?

Past. Connection Preferences enabled you to choose from the following predefined connection methods: Serial to PC, Serial to Modem, IrCOMM to PC, and IrCOMM to Modem.

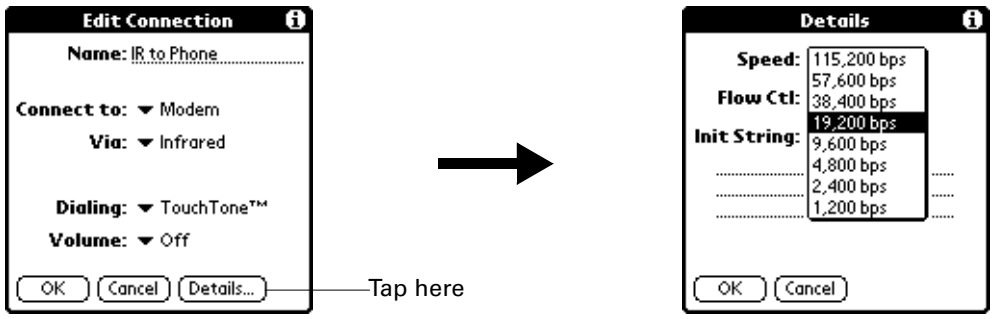
Present. Connection Preferences now includes additional default configurations that enable you to connect to a data-enabled mobile phone. When editing Connection Preferences, you can also select the type of device you want to connect and the method options separately. The Connection to options are: PC, Modem, Phone, and Local Network. The Via options are: Cradle/Cable, Infrared, and Serial.

The following example shows you how to edit the default IR to Phone connection to adjust the communication speed; you can similarly edit other connections or settings. You can use the IR to Phone connection to perform a remote IR HotSync operation. To accomplish the HotSync operation, your handheld sends data through its IR port to a modem attached to or within a mobile phone, which then dials a modem attached to or within your desktop computer, to synchronize with your desktop application.

To edit the IR to Phone connection:

1. Select the IR to Phone connection and tap Edit.

2. Tap Details.



3. Tap the Speed pick list and select the appropriate speed.
4. Enter the initialization string supplied by the documentation for the modem attached to your mobile phone, if necessary.
5. Tap OK, and then tap OK again to save the configuration.

After you create the configuration, you need to set up the HotSync Manager of your desktop application and the HotSync application of your handheld to perform a modem HotSync operation.

Network Preferences

The Network Preferences settings enable you to use TCP/IP software (included with this software) to connect with Internet Service Providers (ISPs) or dial-in (remote access) servers.

What's changed?

Past. The service template Details screen in Network Preferences includes an Idle timeout setting. This setting defines how long your handheld waits before dropping the connection with your ISP or dial-in server when you switch out of a TCP/IP application. In previous versions of Palm OS software, the Idle timeout options were: Immediate, 1 minute, 2 minutes, 3 minutes, and Power Off.

Present. The Idle timeout options in the service template Details screen in Network Preferences have changed. You now have the following choices:

1 minute	Waits one minute for you to open another application before dropping the connection.
2 minutes	Waits two minutes.
3 minutes	Waits three minutes.
Never	Keeps your PPP or SLIP connection until you turn off your handheld (or until it times out). This option works best with an optional modem accessory.

Phone Preferences

Phone Preferences are new to this version of handheld software. These preferences enable you to configure your handheld to communicate with a wireless phone. To use this feature, you must first install the appropriate driver for your phone and the SMS application from the CD-ROM.

To configure Phone Preferences:

1. Tap the Applications icon .
2. Tap the Preferences icon .
3. Tap the pick list in the upper-right corner of the screen.
4. Select Phone.

5. Tap the Connection pick list and select the appropriate driver for your phone.

   NOTE If you do not see a driver for your phone, check www.palm.com/support, and the phone manufacturer's web site, for a driver that is compatible with Palm OS software. Download the driver and install it on your handheld. See your handheld's handbook for instructions on installing applications.

6. Tap Test to confirm that the selected driver works properly with your phone.

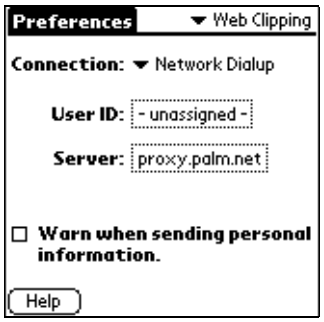
Web Clipping Preferences

Web Clipping Preferences are new to this version of handheld software. These preferences enable you to configure your handheld to make a wireless Internet connection. To use this feature, you must first install the Web Clipping software included on the Palm OS Upgrade with Mobile Connectivity CD-ROM.

IMPORTANT Do not change these settings unless your corporate system administrator instructs you to do so.

To view or change Web Clipping Preferences:

1. Tap the Applications icon .
2. Tap the Preferences icon .
3. Tap the pick list in the upper-right corner of the screen.
4. Select Web Clipping.

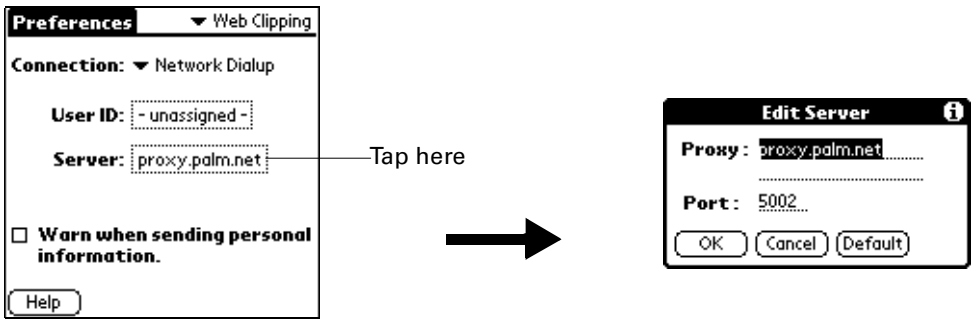


5. Access any of the following options:

Connection	Displays the name of the current connection.
User ID	Displays your user ID.
Server	Displays the name of the proxy server.
Warn when sending personal information	Displays a warning when you submit a query that transmits your personal information, such as your unique handheld ID and your location. The warning gives you a choice; you can continue the transaction or cancel it before any information is sent. If you do not want to send this information over the airwaves, select this check box.

To change the proxy server:

1. From the Web Clipping Preferences screen, tap Server.
2. Enter your new proxy server name or IP address.



TIP To restore the initial proxy server setting, tap Default.

3. Tap OK.

CHAPTER 3

Using the New Windows Desktop Features

This chapter explains how to use the features that are new to the Windows desktop software. This chapter assumes that you are already familiar with the features in version 3.1 of Palm™ Desktop software, and highlights the differences between that desktop software and the desktop software included with this product.

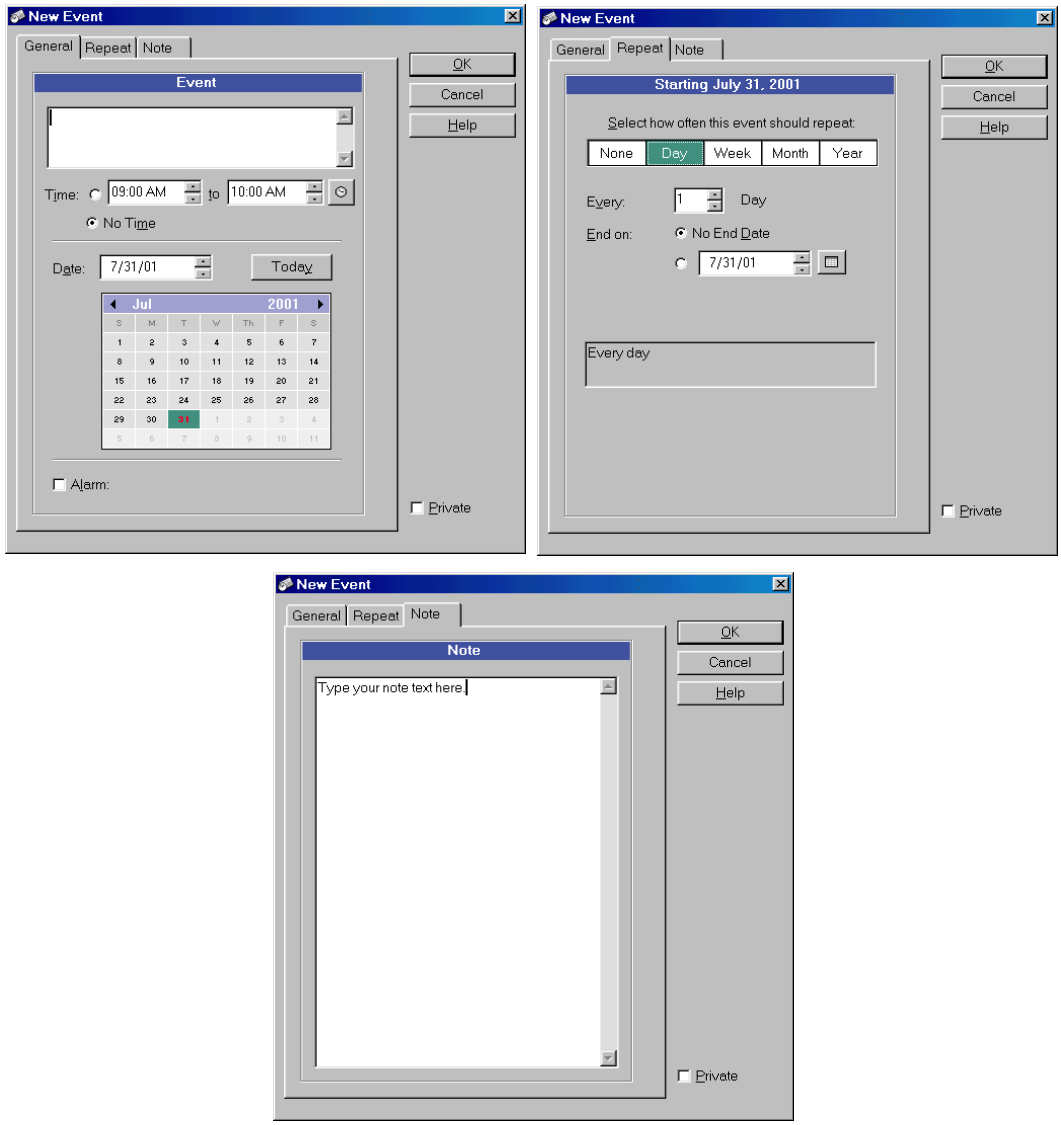
Date Book

The Date Book portion of Palm Desktop software enables you to schedule and manage events, set alarms for events, and attach notes to events. You can also view and print your calendar in daily, weekly, monthly, or yearly format.

What's changed?

Past. Date Book included a Day, Week, and Month view. New events had to be added in Day or Week view, and the New/Edit Events dialog box contained a series of buttons that provided access to date selection, repeating event options, and notes. The view tabs were located on the right side of the screen. The size of the panes within the window were not adjustable.

Present. Date Book also includes a Year view. You can add new events in all four views and the New/Edit Events dialog box has a streamlined interface with three tabs: General, Repeat, and Note. The view tabs are located on the bottom of the screen, and the size of the panes within the view windows are adjustable. Specific changes for each view are described in the sections that follow.



Day view

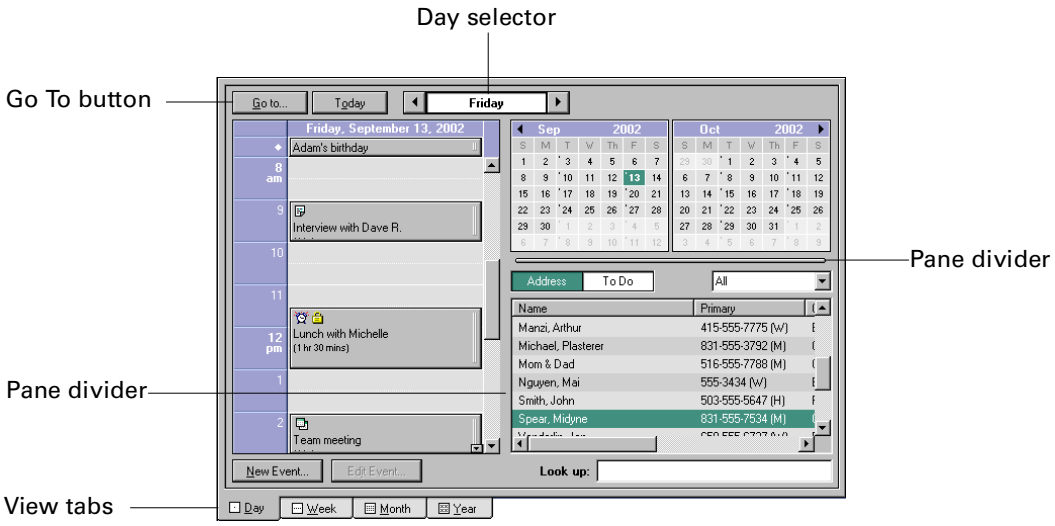
The Day view enables you to view your calendar for a specific day, and to see a list of To Do items or Address Book records.

What's changed?

Past. Day view included Today, Edit, and New buttons. The size of the panes within the window were not adjustable. To move to another day, you had to select it from the month pane.

Present. Day view now includes a Go To button that enables you to select any date you'd like to view. You can also navigate easily between days in the current week by clicking the arrows on the Day selector. For added control, you can adjust the size of the various window panes by dragging the divider between the panes. As you increase or decrease the width of the daily calendar, the number of months

visible increases or decreases, and the data visible in the To Do/Address panel also changes. Similarly, when you increase the height of the To Do/Address panel the number of months visible changes.



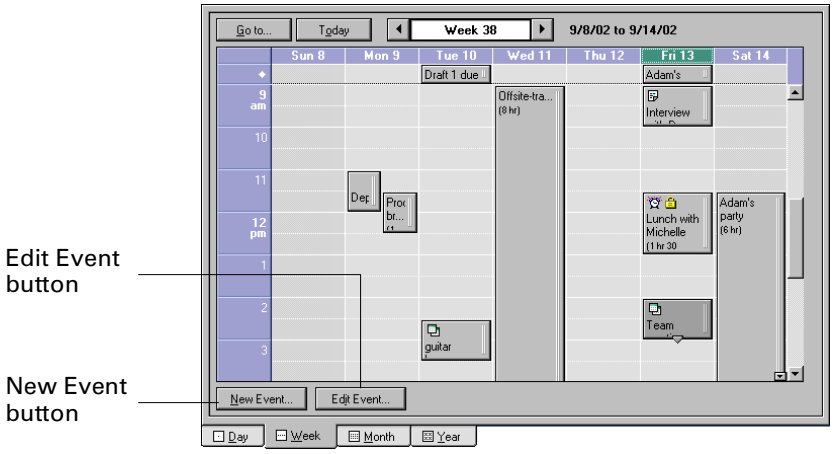
Week view

The Week view enables you to view your calendar for a specific week.

What's changed?

Past. Week view included a week selector, a Go To button, and a Today button.

Present. Week view also includes New Event and Edit Event buttons that enable you to easily create and modify events from this view.



Month view

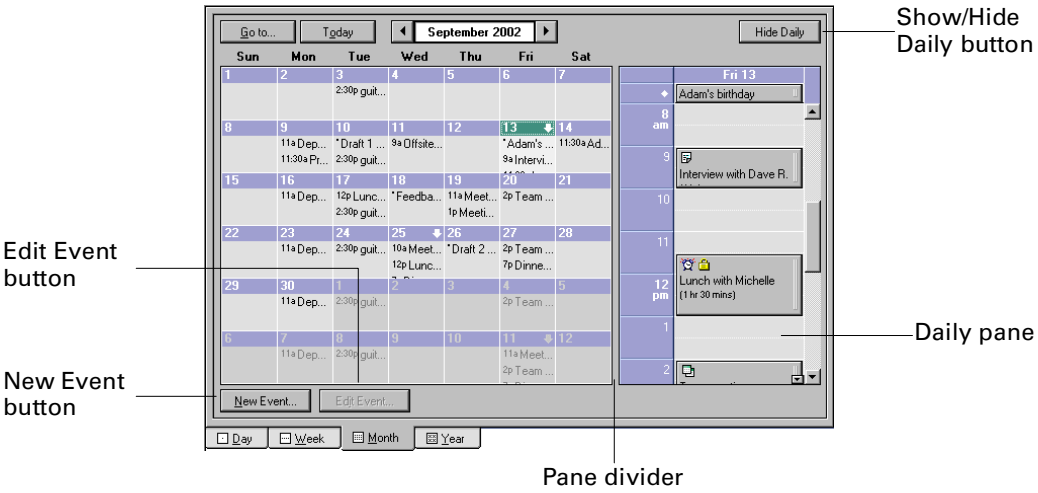
The Month view enables you to view your calendar for an entire month.

What's changed?

Past. Month view included a week selector, a Go To button, and a Today button.

Present. Month view now includes New Event and Edit Event buttons that enable you to easily create and modify events from this view. This view also includes a Show/Hide Daily button that enables you to view the details for the selected day, and you can display details for an event by pointing to it.

Similar to the Day view, you can control the width of the Month and Daily panes by dragging the divider between the two panes. If you prefer not to see the Daily pane, you can hide it by clicking the Hide Daily button.



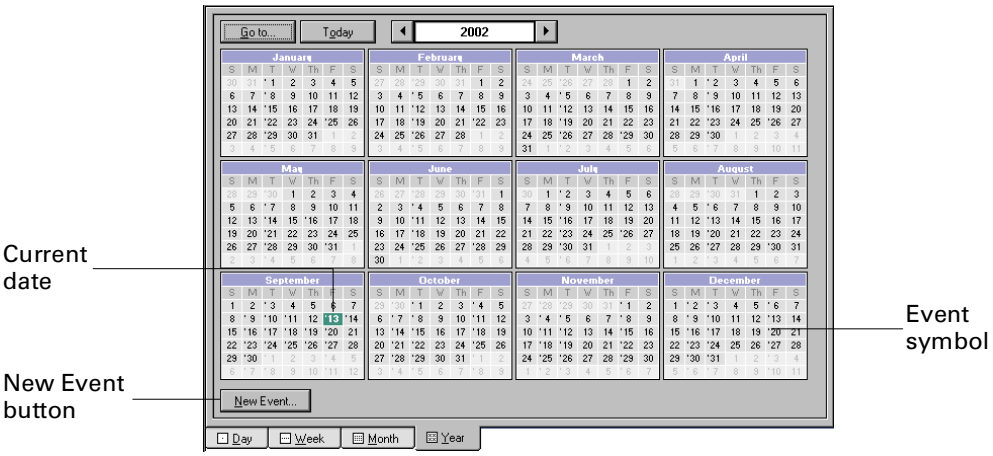
Year view

The Year view is new to this version of Palm Desktop software, and enables you to view your calendar for an entire year.

In Year view you can do any of the following:

- Identify the current date, which appears in a different color.
- Identify events by the triangle to the left of the date.
- Display a description of the events on a particular date by pointing to the date box and waiting for the tooltip text to appear.

- Schedule a new event by clicking a date box and clicking the New Event button.
- View a date in Day view by double-clicking its date box.



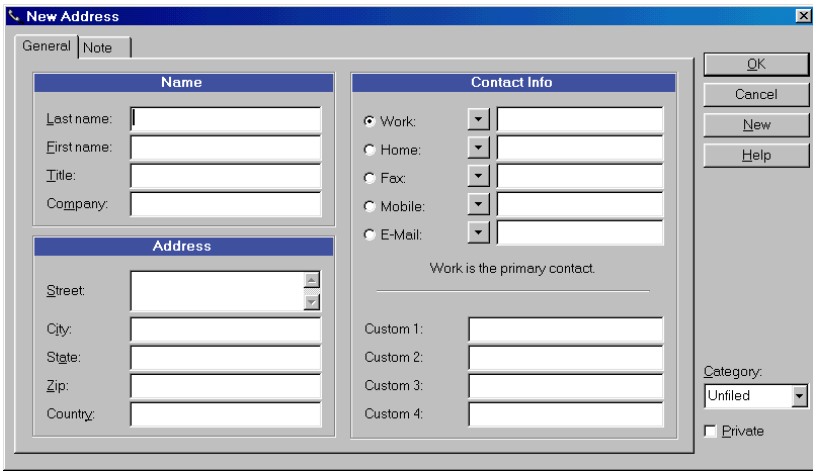
Address Book

Use Address Book to manage contact information for individuals and businesses. You can organize, view, and print Address Book records by categories, and mask or hide confidential records. If your computer has a configured modem, use the Auto Dialer to quickly connect with people in your Address Book.

What's changed?

Past. Address Book included a single view, the List view. The New/Edit Address dialog box had three tabs: Name, Address, and Note.

Present. Address Book includes four views: List, Business Card, Large Icons, and Small Icons. The Name and Address tabs in the New/Edit Address dialog box have been combined, and the combined information appears on the General tab.



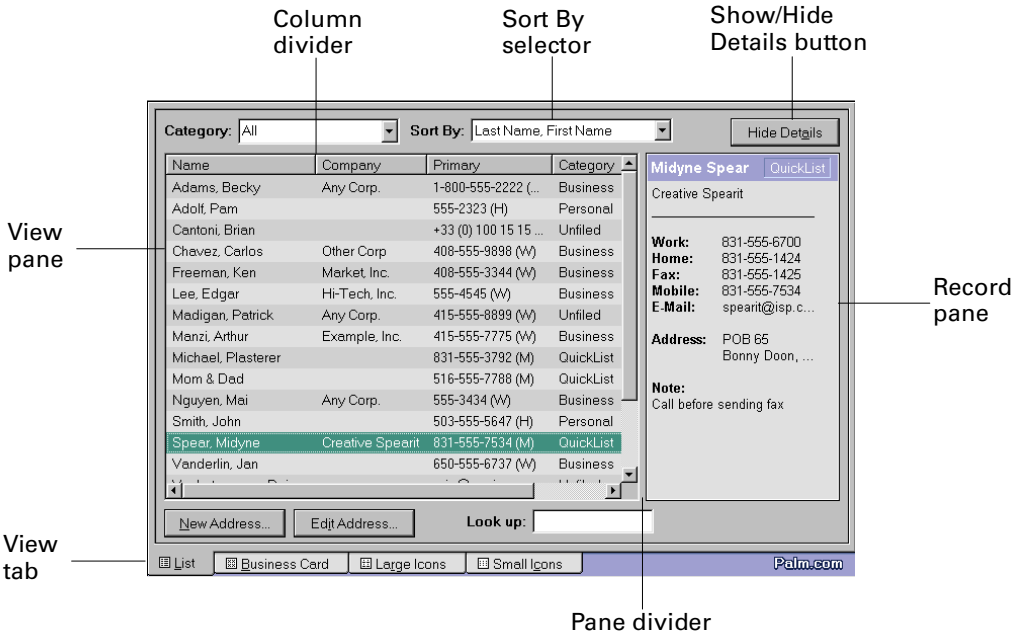
List view

List view displays a line of text for each record in your Address Book.

What's changed?

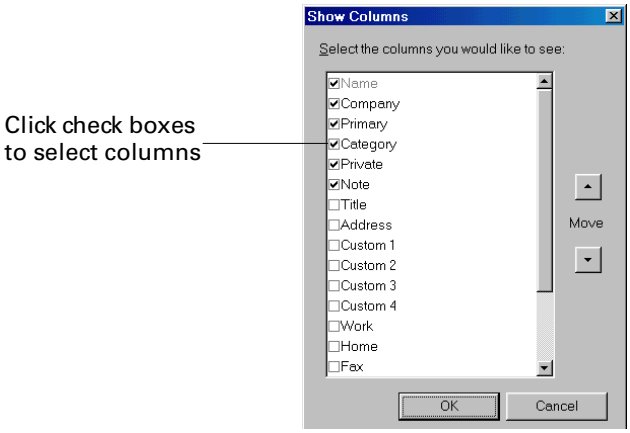
Past. List view included a list and record pane as well as a List By button, a New button, an Edit button, and a Category selector. The list pane displayed only the name and primary phone number.

Present. The Show Columns command enables you to choose which columns appear in the list pane and to arrange them in any order. Additionally, you can now adjust the width of the columns in the view pane by dragging the divider between the columns, and you can adjust the width of the view and record panes by dragging the divider between the two panes. The new Show/Hide Details button also enables you to toggle the record pane display on and off. The List By button has also been replaced with a Sort By selector, and the New and Edit buttons have been renamed to New Address and Edit Address.



To choose which columns appear in List view:

1. Click the Address Book button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.



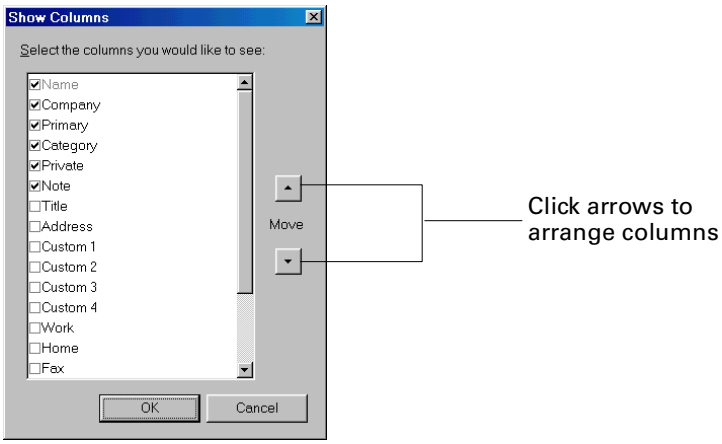
3. Click the check boxes to insert and remove check marks. A check next to a column indicates it will appear in the List view.
4. Click OK.

To arrange the columns in List view:

1. Click the Address Book button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.
3. Click the name of the column that you want to move.

   TIP Make sure you click the text portion of the column name. If you click the check box, it removes the check mark and the column disappears from the List view.

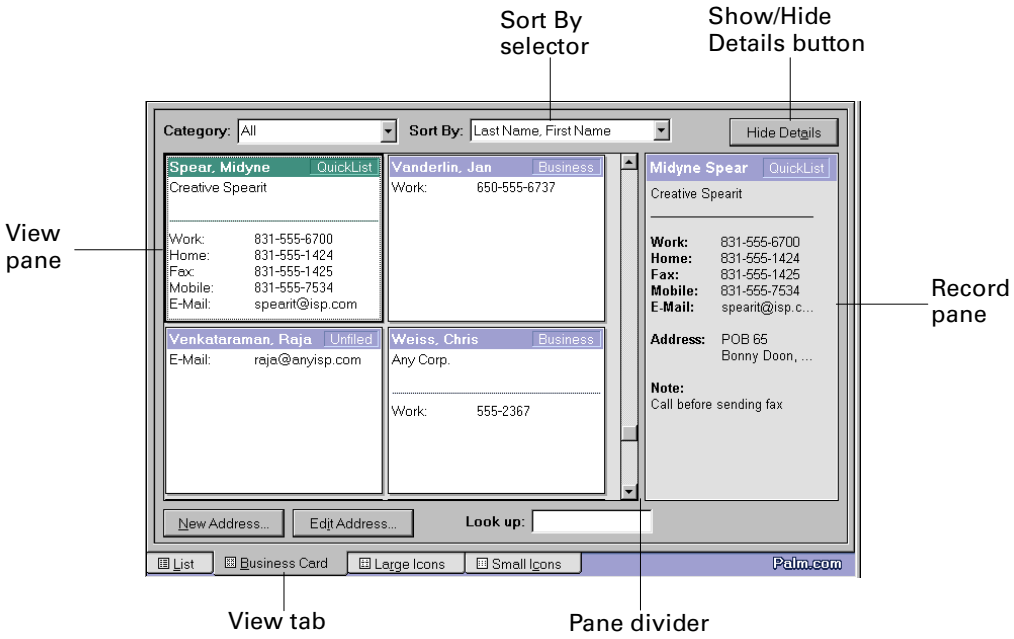
4. Click the up and down arrows to move the selected column to the desired position.



5. Click OK.

Business Card view

The Business Card view is new to this version of Palm Desktop software. This view displays your Address Book records as onscreen business cards. Business Card view also includes the Sort By selector and the Show/Hide Details button, and you can adjust the width of the card and record panes by dragging the pane divider. When you adjust the size of the card pane, the number of cards that appear in the increases and decreases with the size of the pane.

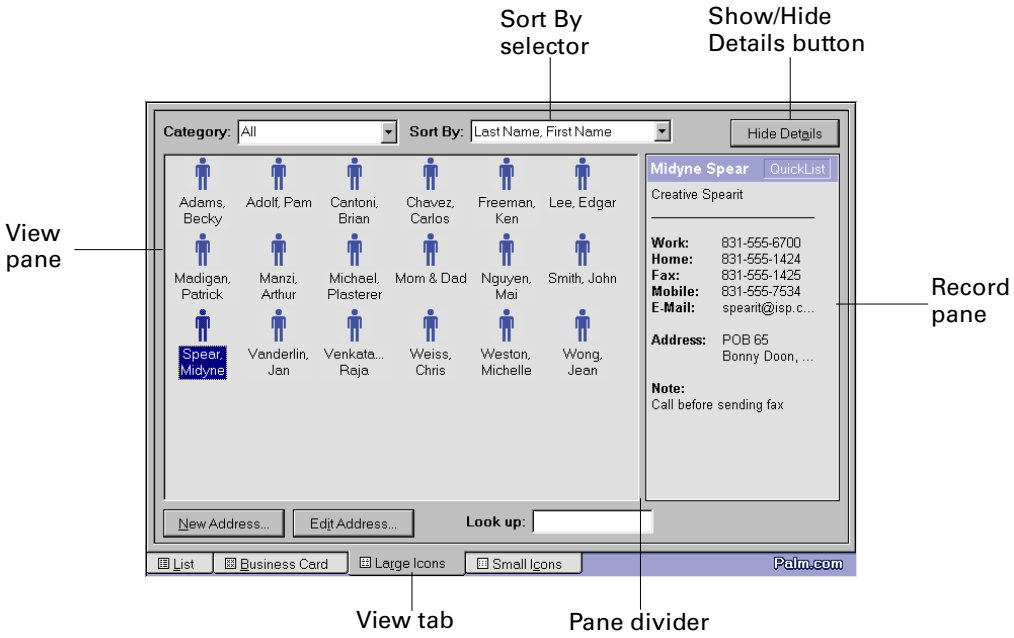


To edit a record in Business Card view, do one of the following:

- Click the record you want to edit, and then click Edit Address.
- Double-click the record you want to edit.

Large Icons and Small Icons views

The Large Icons and Small Icons views are new to this version of Palm Desktop software. The Icons views include the Sort By selector and the Show/Hide Details button, and you can adjust the width of the card and record panes by dragging the pane divider.



To edit a record in the Large Icons and Small Icons views, do one of the following:

- Click the record you want to edit, and then click Edit Address.
- Double-click the record you want to edit.

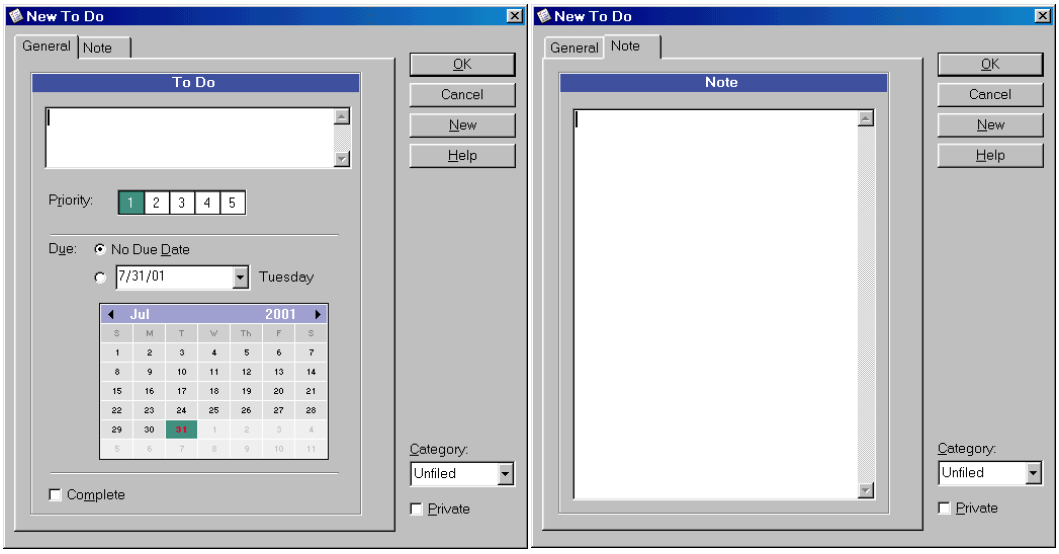
To Do List

To Do List helps you manage tasks. You can view a list of your tasks by due date, priority, or category. For each task (To Do item), you can assign a priority setting, a category, and indicate whether the item is private.

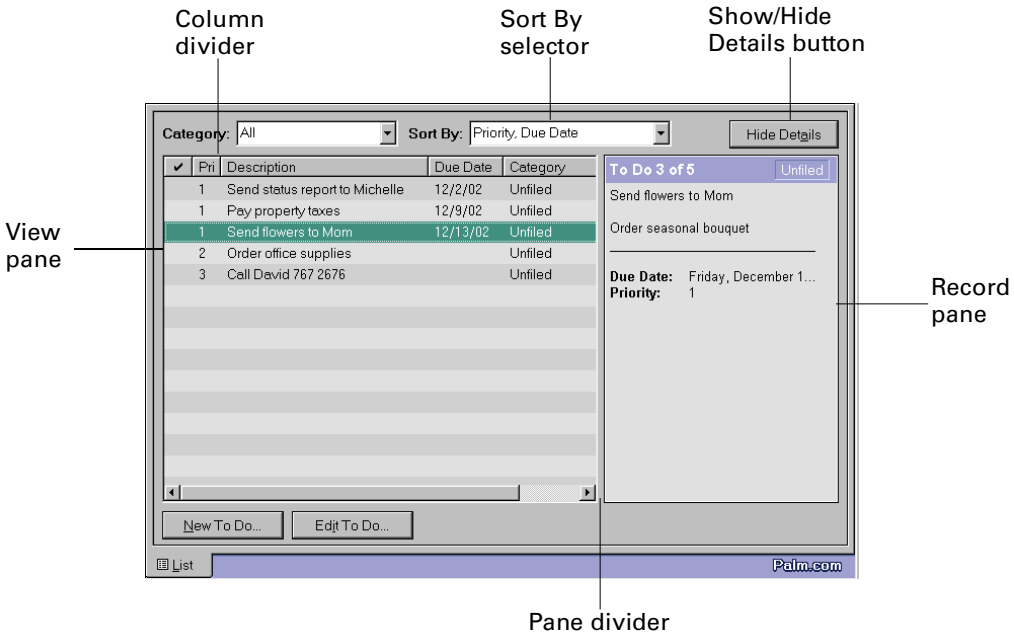
What's changed?

Past. To Do List included a list and a record pane. The record pane served as an entry form for new To Do items. To create a clean record pane, you clicked the New button. To accept a new or changed item, you clicked the Apply button. The Show button opened the Show Options dialog box where you could choose sort options, which items appeared, and which columns appeared. The To Do List window also included a Category selector.

Present. To Do List now includes New To Do and Edit To Do buttons that display the New and Edit To Do dialog boxes. These dialog boxes are used to create and modify To Do items.

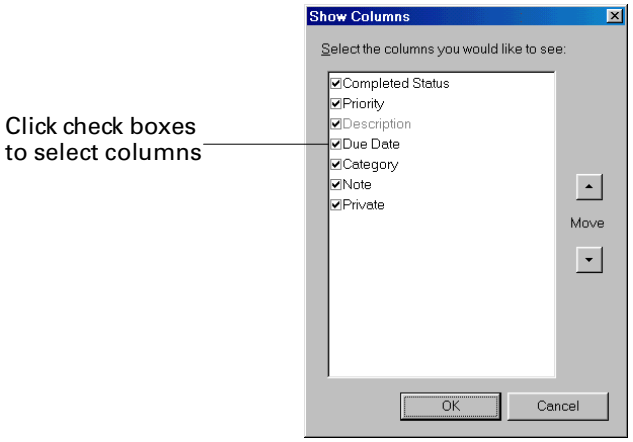


The Apply button has been removed from the record pane, and this pane no longer serves as an entry form. The Show button has been replaced by the Sort By selector, the Show Columns command, and the To Do tab in the Options dialog box. Additionally, you can now adjust the width of the columns in the List view by dragging the divider between the columns, and you can adjust the width of the view and record panes by dragging the divider between the two panes. The new Show/Hide Details button also enables you to toggle the record pane display on and off.



To choose which columns appear in List view:

1. Click the To Do button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.



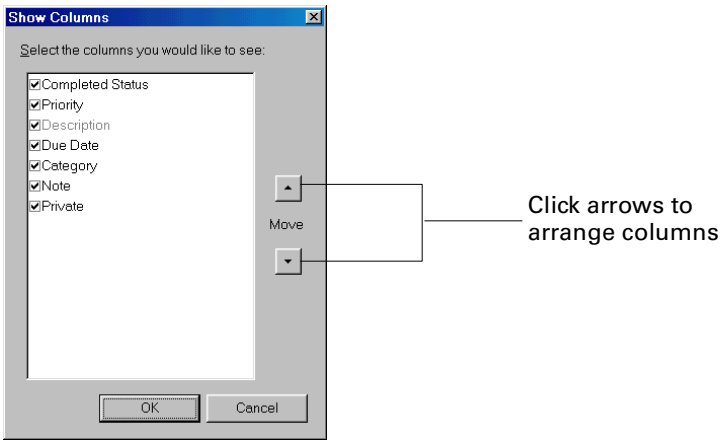
3. Click the check boxes to insert and remove check marks. A check next to a column indicates it will appear in the List view.
4. Click OK.

To arrange the columns in List view:

1. Click the To Do button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.
3. Click the name of the column that you want to move.

   TIP Make sure you click the text portion of the column name. If you click the check box, it removes the check mark and the column disappears from the List view.

4. Click the up and down arrows to move the selected column to the desired position.



5. Click OK.

Memo Pad

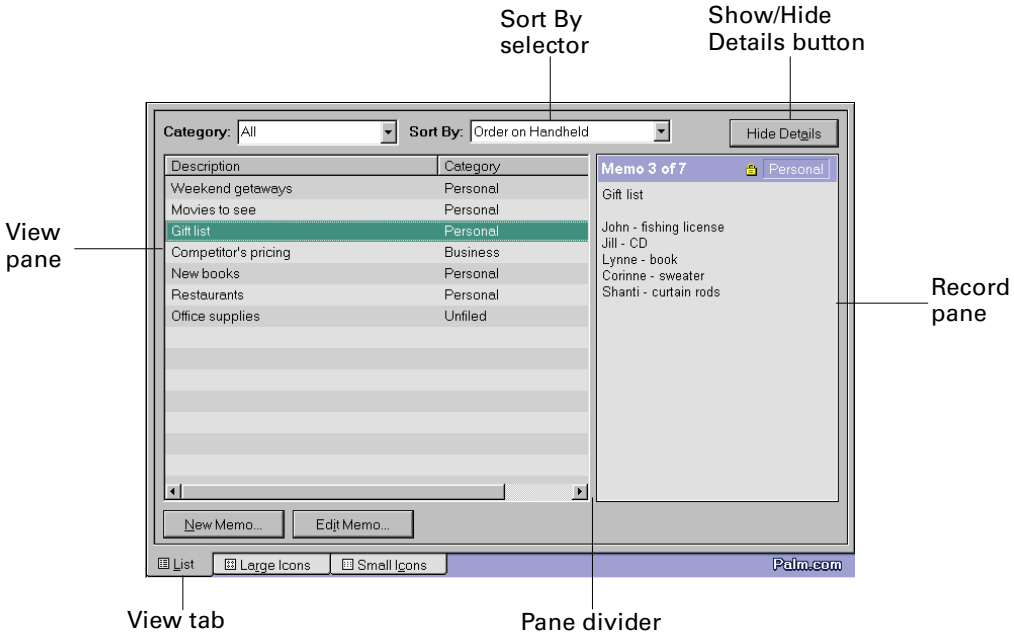
Use Memo Pad to create and store notes and information that aren't associated with the Address Book, Date Book, or Expense applications. You can create memos that contain approximately 800 words, or import files that are even larger to create multiple memos. View memos by alphabetical order, or the order in which they display on your handheld. Assign memos to categories to organize information, and mark memos private so that you can mask them or hide them from view.

What's changed?

Past. Memo Pad included a single List view that contained a list and a record pane. The record pane served as an entry form for new memos. To create a clean record pane, you clicked the New button. To accept a new or changed memo, you clicked the Apply button. The List by button opened the List By dialog box where you could choose sort options. The Memo Pad window also included a Category selector.

Present. Memo Pad includes three views: List, Large Icons, and Small Icons. Each view includes New Memo and Edit Memo buttons that display the New and Edit Memo dialog boxes. These dialog boxes are used to create and modify memos.

The Apply button has been removed from the record pane, and this pane no longer serves as an entry form. The List by button has been replaced by the Sort By selector, and the new Show/Hide Details button enables you to toggle the record pane display on and off. Additionally, you can now adjust the width of the list and record panes by dragging the divider between the two panes.



List view

List view displays a line of text for each memo.

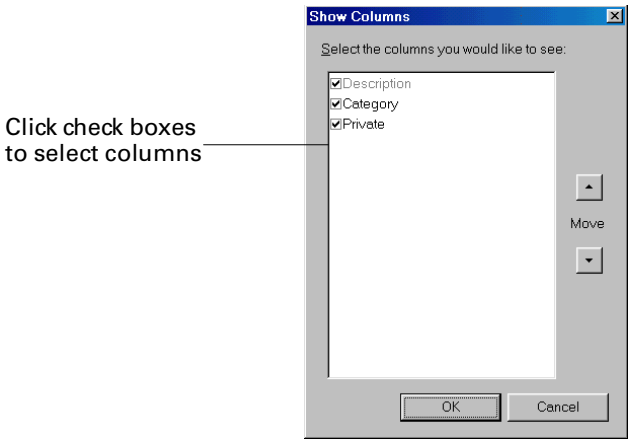
What's changed?

Past. The columns in the List view were a fixed width and could not be customized.

Present. The Show Columns command enables you to choose which columns appear in the list pane and to arrange them in any order.

To choose which columns appear in List view:

1. Click the Memo Pad button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.



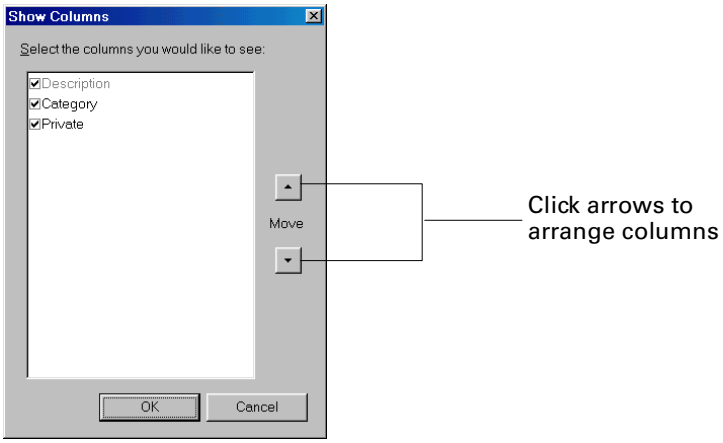
3. Click the check boxes to insert and remove check marks. A check next to a column indicates it will appear in the List view.
4. Click OK.

To arrange the columns in List view:

1. Click the Memo Pad button on the Palm Desktop software Launch bar.
2. From the View menu, select Show Columns.
3. Click the name of the column that you want to move.

   TIP Make sure you click the text portion of the column name. If you click the check box, it removes the check mark and the column disappears from the List view.

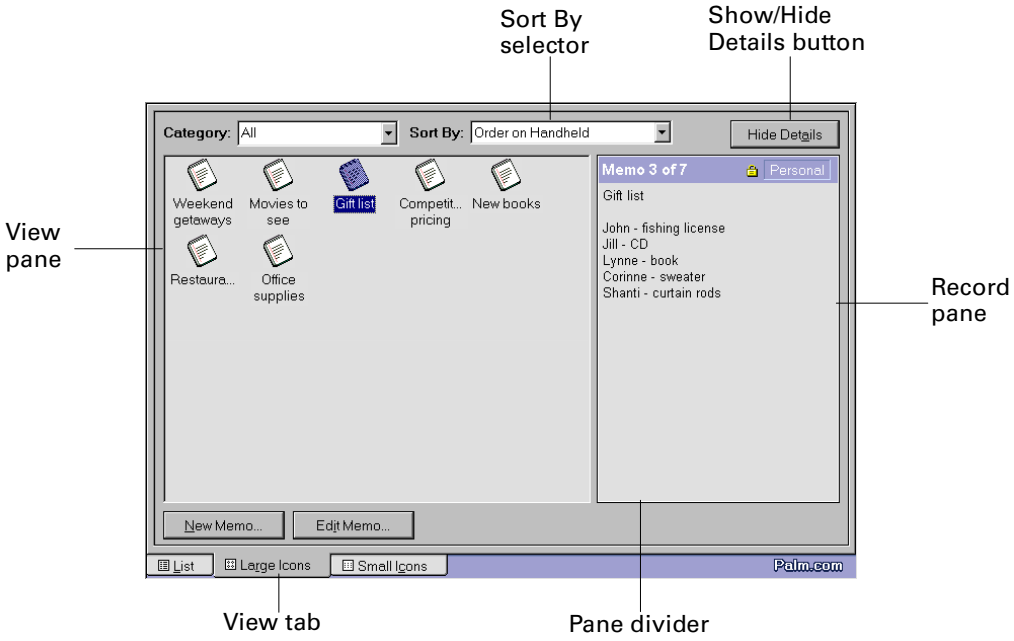
4. Click the up and down arrows to move the selected column to the desired position.



5. Click OK.

Large Icons and Small Icons views

The Large Icons and Small Icons views are new to this version of Palm Desktop software. The Icons views include the Sort By selector and the Show/Hide Details button, and you can adjust the width of the card and record panes by dragging the pane divider.



To edit a record in the Large Icons and Small Icons views, do one of the following:

- Click the memo you want to edit, and then click Edit Memo.
- Double-click the memo you want to edit.

Note Pad

Note Pad is a new application. Use Note Pad on your computer to view, delete, copy, and manage the handwritten notes you create on your handheld. To create or edit a Note Pad note, you must use Note Pad on your handheld.

Opening Note Pad

When you start Note Pad, the application opens in a separate window. By default, Note Pad always opens on top of all open applications and stays visible until you close it.

To open Note Pad from Palm Desktop software:

- Click the Note Pad button on the Launch bar.

To open Note Pad from the Windows Start menu:

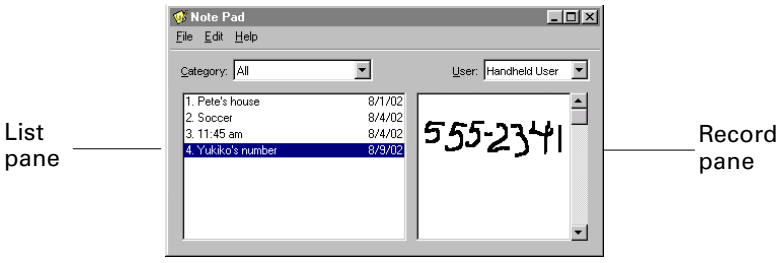
1. Click Start.
2. Select Programs, select Palm Desktop, and then click Note Pad.

Viewing Note Pad notes

After you open the Note Pad window, you can view and manage your notes.

To view a Note Pad note:

1. Be sure your name appears in the User box.
2. In the list pane, click the name of the note.



The note you select in the list pane appears in the record pane.

Showing, masking, and hiding private Note Pad notes

A padlock icon in the Note list denotes a record that you marked private on your handheld. If you use a password on your handheld, you must use the same password to show masked or hidden private records. See "Security" later in this chapter for instructions on showing, masking, and hiding private Note Pad notes.

Copying Note Pad notes

If a Note Pad note contains a handwritten phone number, drawing, or map that you want to preserve, or print, you can copy the note to an application that accepts graphics and save the note as an image.

To copy a note:

1. From Note Pad, select the note you want to copy.
2. From the Edit menu, select Copy.
3. Open an application that accepts graphics, such as Paint.
4. From the Edit menu, select Paste.

If the result of the paste operation is unsatisfactory, check if the application has a Paste Special command on the Edit menu, and use that.

Transcribing Note Pad notes to another application

You can type the text of a Note Pad note into a record in Address Book, Date Book, To Do List, or Memo Pad. For example, if during a phone conversation with your friend Yukiko, you used Note Pad on your handheld to jot down her new work number. You are back in your office now, and you want to update Yukiko's record in Address Book.

To transcribe a note:

1. In Palm Desktop software, click the button of the application into which you want to transcribe the note.
2. Click the Note Pad button on the Palm Desktop software Launch bar.
3. Select the note you want to transcribe.
4. Create a new record in the application you opened in step 1.
5. Enter the text of the note into the new record.

Deleting Note Pad notes

Note Pad notes that you delete in the desktop software are deleted from your handheld the next time you perform a HotSync® operation.

To delete a note:

1. Select the note.
2. Press the Delete key.
3. When the confirmation box appears, click OK.

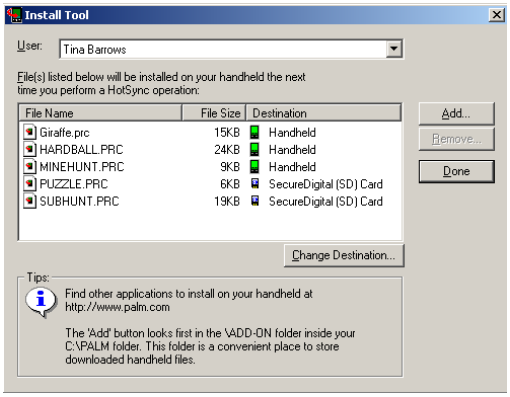
Install Tool

The Install Tool makes it easy to mark applications or files (such as databases or network configuration files) to install during the next HotSync operation. Applications or files that you install on your handheld are different than the applications that come pre-installed with the device. If you perform a hard reset on your handheld, the applications you installed are deleted.

What's changed?

Past. Install Tool included the following buttons: Add, Remove, and Done.

Present. Install Tool also includes a Change Destination button. This button applies only to handhelds that have an expansion card that supports this feature.



Options command

The Options command enables you to choose default settings for most of the applications in your Palm Desktop software. The Options command is located on the Tools menu and when you select this command, it opens the Options dialog box.

What's changed?

Past. The Options dialog box had three tabs: General, Security, and Date Book.

Present. The Options dialog box has seven tabs: General, Security, Date Book, Address Book, To Do List, Alarm, and Themes. The General tab includes new options. The Security and Date Book tabs have not changed.

General tab

The General tab in the Options dialog box enables you to choose settings that apply to all your the applications in your Palm Desktop software.

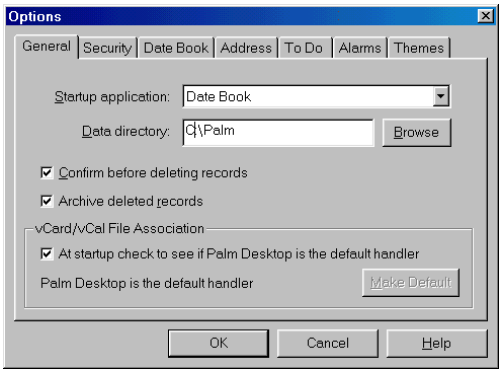
What's changed?

Past. The General tab included the following options: Startup application, Data directory, Confirm before deleting records, and Archive deleted records.

Present. In addition to the options in previous versions, the General tab now includes two new options: Check if Palm Desktop is default handler for vCard/vCal, and Make default.

To set the General tab options:

1. From the Tools menu, select Options.



2. Change any of the following options:

Startup application Click the Startup application selector, and select the application that will open each time you start Palm Desktop software.

Data directory	Type the name of the directory in which to save your data files, or use the Browse button to select the directory.
Confirm before deleting records	Select this check box to display a confirmation box before records are deleted.
Archive deleted records	Select this check box to archive records when you delete them.
Check if Palm Desktop is default handler for vCard/ vCal	Select this check box if you want to check during startup whether Palm Desktop software is the default application to handle electronic business card (vCard) and electronic calendar event (vCal) files. If this check box is selected and Palm Desktop software *is* the default vCard/vCal application, no messages appear at startup. If this check box is selected and Palm Desktop software is *not* the default vCard/vCal application, a message appears each time you start Palm Desktop software. If this check box is not selected, you do not see messages at startup.
Make Default	Click the Make Default button to make Palm Desktop software the default vCard/vCal application. This means that each time you open a vCard/vCal file, Palm Desktop software opens and displays a message asking if you want to import the vCard/vCal file. If Palm Desktop software is already the default vCard/vCal application, this button is disabled.

3. Click OK.

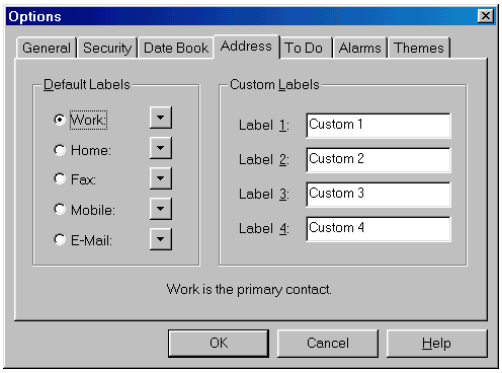
Address Book tab

The Address Book tab in the Options dialog box enables you to define the custom field labels, to set the default contact labels, and to define the label layout for your Address Book records.

The Address Book tab is new to this version of Palm Desktop software.

To set the Address Book tab options:

1. From the Tools menu, select Options.
2. Click the Address Book tab.



3. Under Default Labels, click the drop-down arrow next to each item and select a label from the list.
4. Under Default Labels, click the option button next to the label you want to use as the default primary contact when you create a new address.
5. Under Custom Labels, type the labels you want to assign to the four custom Address fields.
6. Click OK.

To Do tab

The To Do tab in the Options dialog box enables you to specify how records will display in the To Do List. Changing the way you view To Do items in Palm Desktop software does not affect the way they display on your handheld.

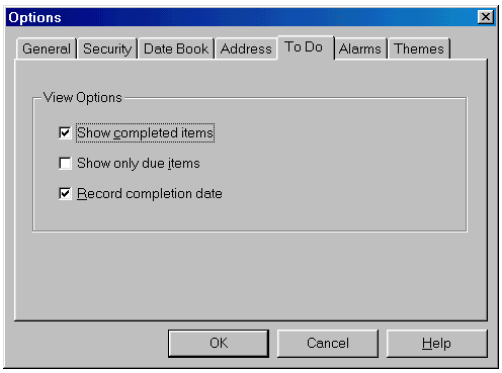
What's changed?

Past. The To Do options were located in the Show Options dialog box.

Present. Several of the options from the Show Options dialog box are located on the To Do tab.

To set the To Do tab options:

1. From the Tools menu, select Options.
2. Click the To Do tab.



3. Change any of the following options:

Show completed items	Select this check box to show completed items in the View pane. If you deselect this check box, you will not see completed items in the View pane.
Show only due items	Select this check box to show only those items that are due on or before the current date, or do not have a due date.
Record completion date	Select this check box to replace the due date with the completion date when you mark To Do items complete.

4. Click OK.

Alarms tab

The Alarms tab in the Options dialog box enables you to choose alarm notification settings for your computer.

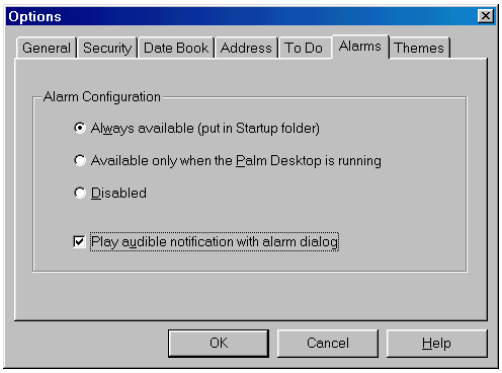
What's changed?

Past. Alarms did not sound on your computer.

Present. You can set alarm notification options for your computer.

To set the Alarms tab options:

1. From the Tools menu, select Options.
2. Click the Alarms tab.



3. Change any of the following options:

Always available	Click this option if you want alarm notifications to appear regardless of whether Palm Desktop software is running. If notifications are scheduled to appear while your computer is off, they appear the next time you turn on your computer.
Available only when Palm Desktop is running	Click this option if you want alarm notifications to appear only when Palm Desktop software is running.
Disabled	Click this option if you do not want alarm notifications to appear on your computer.
Play audible notification with alarm dialog	Click this option if you want an alarm tone to sound when the alarm notification message appears.

4. Click OK.

Themes tab

The Themes tab in the Options dialog box enables you to customize the appearance of Palm Desktop software.

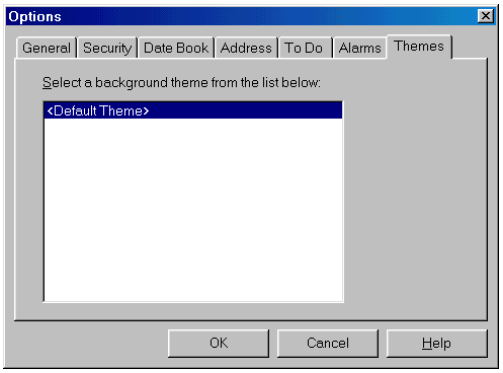
What's changed?

Past. The appearance of Palm Desktop software was controlled by the Windows system defaults.

Present. You can select a color scheme that is specific to Palm Desktop software.

To set the Themes tab options:

1. From the Tools menu, select Options.
2. Click the Themes tab.



3. Select a theme from the list.

   When you click a theme, Palm Desktop software immediately demonstrates the new color scheme.

4. Click OK to apply the current theme selection.

Importing and exporting data

Palm Desktop software can import and export information in many different file formats. Many other Microsoft Windows applications can import or export files that are compatible with the same file formats as Palm Desktop software.

What's changed?

Past. Palm Desktop software supported importing and exporting data in the following file formats:

Date Book	■ Date Book Archive (*.dba)
Address Book	■ Address Book Archive (*.aba) ■ Comma Delimited (*.csv, *.txt) ■ Tab Separated Values (*.tab, *.tsv, *.txt) ■ CSV (Lotus Organizer 2.x/97 mapping)
To Do List	■ To Do Archive (*.tda)
Memo Pad	■ Memo Pad Archive (*.mpa) ■ Comma Separated (*.csv, *.txt) ■ Tab Separated Values (*.tab, *.tsv, *.txt) ■ Text (*.txt)

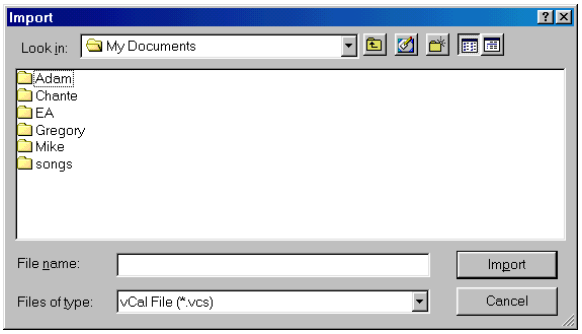
Present. Date Book also supports importing and exporting vCal File (*.vcs) files, and Address Book also supports importing and exporting vCard File (*.vcf) files.

vCal files

The vCal files are industry-standard electronic calendar records that you can import into or export from the Date Book application in Palm Desktop software.

To import vCal files:

1. Click the Date Book button on the Palm Desktop software Launch bar.
2. From the File menu, select Import.



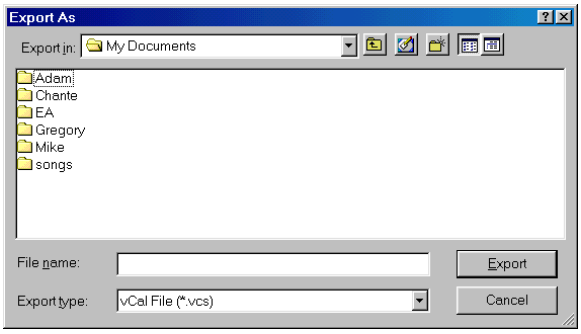
3. Locate and select the vCal file you want to import.
4. Under File type, select vCal file (*.vcs).
5. Click Import.
6. Click Yes.

TIP You can also import a vCal file by locating the file in My Computer or Windows Explorer and double-clicking it, or dragging-and-dropping it onto the Palm Desktop software window.

To export information to a vCal file:

1. Click the Date Book button on the Palm Desktop software Launch bar.
2. Select the record (or records) you want to export.

3. From the File menu, select Export vCal.



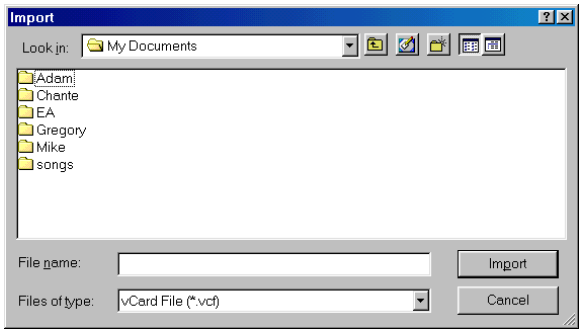
4. Enter a name for the file in the File Name box.
5. Use the Folders and Drives selectors to choose a location for the file.
6. Click Export.

vCard files

The vCard files are industry-standard electronic business cards that you can import into or export from the Address Book application in Palm Desktop software.

To import vCard files:

1. Click the Address Book button on the Palm Desktop software Launch bar.
2. From the File menu, select Import.

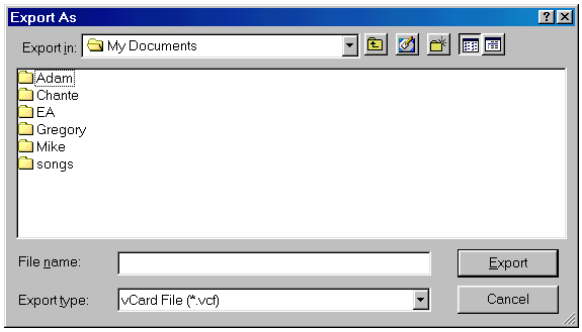


3. Locate and select the vCard file you want to import.
4. Under File type, select vCard file (*.vcf).
5. Click Import.
6. Select the category where you want to place the vCard.
7. Click Yes.

TIP You can also import a vCard file by locating the file in My Computer or Windows Explorer and double-clicking it, or dragging-and-dropping it onto the Palm Desktop software window.

To export information to a vCard file:

1. Click the Address Book button on the Palm Desktop software Launch bar.
2. Select the record (or records) you want to export.
3. From the File menu, select Export vCard.



4. Enter a name for the file in the File Name box.
5. Use the Folders and Drives selectors to choose a location for the file.
6. Click Export.

Security

The security features in Palm Desktop software enable you to protect your confidential information.

What's changed?

Past. Palm Desktop software offered password protection at the username level.

Present. Palm Desktop software offers password protection at the record level. Private records appear with a padlock icon in the View pane. You can now choose to mask or hide private records. If you use a password on your handheld, you must use your password to show masked or hidden private records.

Masking private records

- Places a shaded bar over all private records in Palm Desktop software.
- Includes records in the Total record number in the status bar of the Address Book, Memo Pad, To Do List, and Note Pad.

Hiding private records

- Hides all private records in Palm Desktop software.
- Removes records from the Total record number in the status bar of the Address Book, Memo Pad, To Do List, and Note Pad.

To mask private records:

1. From the View menu, select Mask Private Records.
2. If a confirmation box appears, click OK.

To hide private records:

1. From the View menu, select Hide Private Records.
2. If a confirmation box appears, click OK.

To show private records:

1. From the View menu, select Show Private Records.
2. If you have a password on your handheld, type your password in the password dialog box, and then click OK.

TIP You can also choose to show, hide, or mask private records by clicking the Security icon on the Palm Desktop software toolbar, and choosing an option from the list.

HotSync Manager

HotSync Manager is an independent application that oversees HotSync operations. HotSync Manager monitors your computer's communication ports and listens for a HotSync command from your handheld.

What's changed?

Past. HotSync Manager supported serial ports, modems, and infrared communication.

Present. HotSync Manager also supports USB ports for use with a USB cradle/cable. Palm V or Palm III series handhelds can use this feature with a PalmConnect® USB adapter.

NOTE Windows 95 and Windows NT do not support USB.

To use a USB port for HotSync operations:

1. Connect a cradle to a USB port on your computer.
2. Click the HotSync Manager icon ™ in the Windows system tray.
3. Click Local USB.

Mail

Mail (sometimes referred to as HotSync Mail) enables you to use your handheld, to read, reply to, compose, and delete e-mail from your Windows desktop E-Mail application while you're away from your desk. The next time you synchronize with your computer, you send and receive your new mail.

What's changed?

Past. Mail's synchronization conduits supported a number of desktop E-Mail applications, such as Microsoft Exchange (version 4.0 or higher), QUALCOMM Eudora (version 3.0.3 or higher), and Lotus cc:Mail (versions 2.5, 6.0, and 7.0).

Present. Mail's synchronization conduits support newer versions of desktop E-Mail applications as well as additional applications, including:

- Microsoft Exchange (version 5.0 or higher)
- QUALCOMM Eudora (version 3.0.1 or higher)
- Lotus cc:Mail (6.0 or higher)
- Microsoft Outlook 97 (or higher)
- Microsoft Outlook Express
- Netscape Communicator (version 4.5 or higher)

You can see the full list of the supported applications when you set up Mail. If your desktop E-Mail application does not appear on the list, you can manage your desktop E-Mail application from your handheld by using a third-party conduit, which lets you synchronize your desktop E-Mail application and your handheld.

Contact the vendor of your E-Mail application or visit the web site www.palm.com for more information.

To set up Mail on your computer:

1. Install Palm Desktop software.
2. Click Start.
3. Select Programs, select Palm Desktop, and then click Mail Setup to begin setup.
4. Follow the instructions onscreen to set up your handheld for use with your desktop E-Mail application.

Removing Palm Desktop software

If you no longer want to use Palm Desktop software, you can remove it from your computer.

What's changed?

Past. The Start menu included a command to remove Palm Desktop software.

Present. Palm Desktop software is removed using the Windows Control Panel.

To remove Palm Desktop software from a Windows computer:

1. Click Start.
2. Select Settings, and then click Control Panel.
3. Double-click the Add/Remove Programs icon.
4. Click the Change or Remove Programs button.
5. Select Palm Desktop.
6. Click Change/Remove.
7. Click Yes in the Confirm File Deletion box.
8. Click OK.
9. Click Close.

CHAPTER 4

Using the New Mac Desktop Features

This chapter explains how to use the features that are new to the Mac desktop software. This chapter assumes that you are already familiar with the features of Palm Desktop software version 2.5 for Mac, and highlights the differences between that desktop software and the desktop software included with this product.

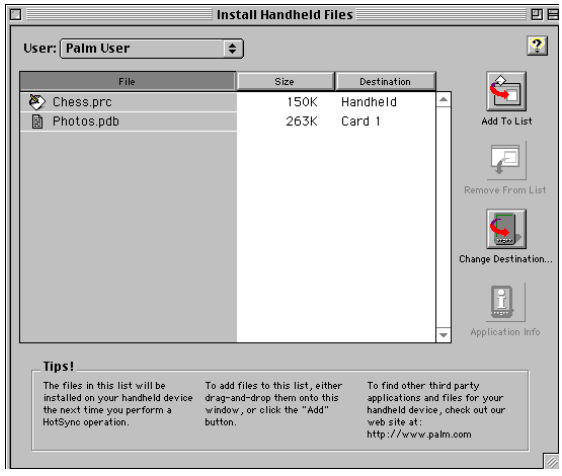
Install Tool

The Install Tool makes it easy to mark applications or files (such as databases or network configuration files) to install during the next HotSync® operation. Applications or files that you install on your handheld are different than the applications that come pre-installed with the device. Applications, files, and information you store on your handheld reside in RAM (random access memory). If you perform a hard reset on your handheld, the applications you installed are deleted.

What's changed?

Past. Install Tool included the following buttons: Add To List, Remove From List, and Application Info.

Present. Install Tool also includes a Change Destination button. This button applies only to handhelds that have an expansion card that supports this feature.



Note Pad

Note Pad is a new application. Use Note Pad on your computer to view, delete, copy, and manage the handwritten notes you create on your handheld. To create or edit a Note Pad note, you must use Note Pad on your handheld.

Opening Note Pad

When you start Note Pad, the application opens in a separate window.

To open Note Pad:

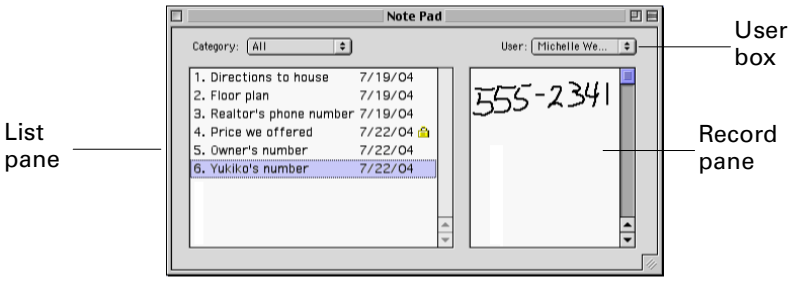
- Double-click the Note Pad icon in the Palm folder.

Viewing Note Pad notes

After you open the Note Pad window, you can view and manage your notes.

To view a Note Pad note:

1. Be sure your name appears in the User box.
2. In the list pane, click the name of the note.



The note you select in the list pane appears in the record pane.

Copying Note Pad notes

If a Note Pad note contains a handwritten phone number, drawing, or map that you want to preserve, or print, you can copy the note to an application that accepts graphics and save the note as an image.

To copy a note:

1. From Note Pad, select the note you want to copy.
2. From the Edit menu, select Copy.
3. Open an application that accepts graphics, such as Paint.
4. From the Edit menu, select Paste.

If the result of the paste operation is unsatisfactory, check if the application has a Paste Special command on the Edit menu, and use that.

Transcribing Note Pad notes to another application

You can type the text of a Note Pad note into a record in Address Book, Date Book, To Do List, or Memo Pad. For example, if during a phone conversation with your friend Yukiko, you used Note Pad on your handheld to jot down her new work number. You are back in your office now, and you want to update Yukiko's record in Address Book.

To transcribe a note:

1. In the desktop software, click the button of the application into which you want to transcribe the note.
2. Double-click the Note Pad icon in the Palm folder.
3. Select the note you want to transcribe.
4. Create a new record in the application you opened in step 1.
5. Enter the text of the note into the new record.

Deleting Note Pad notes

Note Pad notes that you delete in the desktop software are deleted from your handheld the next time you perform a HotSync® operation.

To delete a note:

1. Select the note.
2. Press the Delete key.
3. When the confirmation box appears, click Delete.

Showing, masking, and hiding private Note Pad notes

A padlock icon in the Note list denotes a record that you marked private on your handheld. If you use a password on your handheld, you must use the same password to show masked or hidden private records.

Masking private records places a shaded bar over the title of all private records in Note Pad. When you select the title of a masked note, nothing appears in the Note view.

Hiding private records hides all private records in Note Pad.

To mask private records:

- From the View menu, select Mask Private Records.

To hide private records:

- From the View menu, select Hide Private Records.

To show private records:

1. From the View menu, select Show Private Records.
2. If you have a password on your handheld, enter your password in the password dialog box and click OK.

TIP You can also unmask a single masked record by double-clicking it.

APPENDIX A

Troubleshooting

If you encounter a problem with your handheld, please do not call Technical Support until you have reviewed the following resources:

- README file, located in the folder where you installed the desktop software on Windows computers (or on your installation CD-ROM for Mac computers)
- Handbook that came with your handheld.
- Helpnote folder, located in the folder where you installed the desktop software on Windows computers (or on your installation CD-ROM for Mac computers)
- The desktop software online Help
- *Palm Desktop Software for the Macintosh User's Guide* located in the Documentation folder on your installation CD-ROM
- "Palm Support Assistant" knowledgebase, accessible at www.palm.com under the Support section
- Most recent HelpNotes for your handheld on your regional web site

If you are still having problems, contact Technical Support for assistance. See the Worldwide Customer Support card that comes with your software, or go to www.palm.com for US and international telephone numbers.

NOTE Thousands of third-party add-on applications have been written for Palm OS® handhelds. Unfortunately, Palm, Inc. is not able to support such a large number of third-party applications. If you are having a problem with a third-party application, please contact the developer or publisher of that software.

Index

A

Address Book
- adjusting columns 40
- arranging columns 41
- Business Card view 42
- Custom fields 54
- default labels 53
- dialing from 21
- Edit Address dialog 39
- Hide Details button 40, 42, 43
- Large Icons view 43
- List view 40
- New Address dialog 39
- Options 53
- overview 39
- pane in Date Book 36
- selecting columns 41
- Show Details button 40, 42, 43
- Small Icons view 43

Alarms 19
- Options 55
- setting for notes 24

Applications
- installing from Mac 65
- installing from Windows 51

Auto lock handheld 17

B

Business Card view 42

C

Calculator 22
CD-ROM 3–4
Columns
- adjusting width 40, 44, 46
- arranging 41, 45, 48
- selecting 41, 45, 47

Commands
- Auto Lock 17
- Note Pad menus 26
- Options 52
- Send 20
- Show Columns 40, 45, 47

Communications
- infrared 30
- system requirements 5

Compatibility 4
Components 3–4
Computer requirements 4–5
Configurations *See* Preferences
Connection Preferences 29
Copying
- notes 50, 66

Creating
- address entries 39
- events 35
- memos 46
- notes 23
- To Do items 44

D

Daily pane 38
Data
- entering on handheld 15
- sending 20

Date Book
- Address pane 36
- Daily pane 38
- Day view 36
- Edit Events 35
- Hide Daily button 38
- Month view 38
- New Events dialog 35
- overview 35
- Show Daily button 38

To Do pane 36
Week view 37
Year view 38
Date, setting on handheld 28
Day view 36
Daylight savings 29
Deleting
desktop software 63
notes 51, 67
Desktop software
colors 56
Graffiti 15
Mac installation 9
overview 7
removing 63
system requirements 4–5
Windows installation 8
Dialing from Address Book 21

E

Editing
address entries 39
events 35
memos 46
To Do items 44
E-Mail
desktop applications 62
Entering
data 15
notes 23
Exporting
vCal files 58
vCard files 60

F

following 4

G

General
Options 52
General Preferences 27
Graffiti 15

H

Handheld
auto locking 17
entering data on 15
locking 17–18
requirements 4
Handheld software
Mac installation 9
overview 6
requirements 4
Windows installation 8
Hide Daily button 38
Hide Details button 40, 42, 43, 46, 48
Hiding records 60
HotSync Manager
overview 61

I

Idle timeout 31
Importing
vCal files 58
vCard files 59
Infrared communication 30
Install Tool 51, 65
Installing
applications on handheld 51, 65
desktop software 8–9
handheld software 8–9
MultiMail SE software 13–14
requirements for 4–5, 9, 11, 13
SMS software 11–13
Web Clipping software 9–11

L

Large Icons view
in Address Book 43
in Memo Pad 48
Launching
Note Pad 22, 49, 66
List view
in Address Book 40
in Memo Pad 47
in To Do List 44
Locking handheld 17–18

M

Mac
desktop software overview 8
handheld software installation 9
installing applications from 65
MultiMail SE software installation 14
SMS software installation 12
system requirements 5
Web Clipping software installation 10
Mail
desktop support 62
Masking records 60
Memo Pad
adjusting column width 46
arranging columns 48
Edit Memo dialog 46
Hide Details button 46, 48
Large Icons view 48
List view 47
New Memo dialog 46
overview 46
selecting columns 47
Show Columns command 47
Show Details button 46, 48
Small Icons view 48
Sort By selector 46
Menus
Note Pad 26
Mobile
system requirements 5
Month view 38
Moving, columns 41, 45, 48
MultiMail SE software
Mac installation 14
Windows installation 13

N

Network Preferences 30
Note Pad
clearing notes 24
copying notes 50, 66
creating notes 23
deleting notes 24, 51, 67
menus 26
opening in Windows 49
opening on handheld 22
opening on Mac 66
overview 22
reviewing notes 23, 50, 66
setting alarms 24
transcribing notes 50, 67

O

Opening
Note Pad 22, 49, 66
Options
Address Book 53
Alarms 55
command 52
General 52
Themes 56
To Do List 54

P

Passwords 16–18, 60–61
Phone
infrared communication 30
Preferences 31
system requirements 5
Preferences
Connection 29
Date & Time 27
daylight savings 29
General 27
Network 30
Phone 31
time zone 28
Web Clipping 32

R

Records
hiding 60
masking 60
sending 20
showing private 61
Reminders 19
Removing
desktop software 63
notes 51, 67
Reviewing
notes 23, 50, 66

S

Security
  hiding records 60
  hint 16
  locking handheld 17–18
  masking records 60
  overview 60
  password 16–18, 60–61
  showing records 61
Send command 20
Sending data 20
Setting
  Connection Preferences 30
  date & time 27
  daylight savings 29
  Phone Preferences 31
  time zone 28
  Web Clipping Preferences 32
Show Columns 40, 45, 47
Show Daily button 38
Show Details button 40, 42, 43, 46, 48
Small Icons view
  in Address Book 43
  in Memo Pad 48
SMS software
  Mac installation 12
  Windows installation 11
Sort By selector
  in Address Book 40, 42, 43
  in Memo Pad 46
  in To Do List 44
Square root 22
Support
  for desktop E-Mail 62
  handheld models 4
  Technical 69
  USB 61
System
  date 28
  requirements 4–5
  time 28

T

Technical Support 69
Themes
  Options 56
Time Zone 28
Time, setting on handheld 28
To Do List
  adjusting column widths 44
  arranging columns 45
  Edit To Do dialog 44
  List view 44
  New To Do dialog 44
  Options 54
  overview 43
  pane in Date Book 36
  selecting columns 45
  Sort By selector 44

U

Uninstalling desktop software 63
USB ports 61

V

vCal 52, 58
  exporting files 58
  importing files 58
vCard 52, 59
  exporting files 60
  importing files 59

W

Web Clipping software
  Mac installation 10
  Preferences 32
  Windows installation 10
Week view 37
Windows
  desktop E-Mail support 62
  desktop software installation 8
  desktop software overview 7
  handheld software installation 8
  MultiMail SE software installation 13
  SMS software installation 11
  system requirements 4
  Web Clipping software installation 10
Wireless
  system requirements 5

Y

Year view 38