



**Handbook for the
Palm™ Zire™ 21
Handheld**

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About This Book

Congratulations on your purchase of a Palm™ Zire™ 21 handheld. This handbook is designed to quickly familiarize you with your handheld. It describes all you need to know about how to use your handheld and the applications that come with it. It guides you through:

- Locating all the parts of your handheld
- Viewing and entering data
- Using your handheld with your computer
- Personalizing your handheld with your own preference settings

After you become familiar with the basic functionality of your handheld, you can use the rest of this handbook as a reference guide for less common tasks, for maintenance of your handheld, and for any problems that might arise as you operate your handheld.

Setting Up Your Palm™ Zire™ 21 Handheld

Palm™ Desktop software on your Windows or Mac computer allows you to easily enter data on your handheld, and to transfer information between your handheld and your computer so you always have a backup copy. To install and operate Palm™ Desktop software, your computer system must meet the requirements described in this section.

Minimum requirements: Windows computers

The minimum requirements for Windows computers are as follows:

- A Pentium-class PC running one of the following operating systems:
 - Windows 98
 - Windows ME
 - Windows 2000 Pro (requires administrator rights to install Palm Desktop software)
 - Windows XP Home or Pro (requires administrator rights to install Palm Desktop software)
- Internet Explorer 4.01 with SP2 or later
- 60 megabytes (MB) available hard disk space
- VGA monitor or better
- CD-ROM or DVD-ROM drive (you can also download Palm Desktop software from www.palm.com)
- Mouse
- One available USB port

Minimum requirements: Mac computers

The minimum requirements for Mac computers are as follows:

- Mac computer or compatible with a PowerPC processor
- Mac OS 9.1 or later with 12MB free memory or Mac OS X, version 10.1.2 to 10.2.6 (Mac OS X requires administrator rights to install Palm Desktop software)

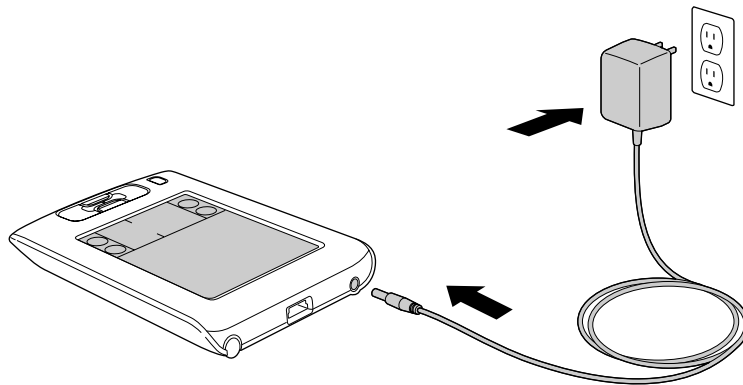
- 25MB available hard disk space
- Monitor that supports screen resolution of 800 x 600 or better
- CD-ROM or DVD-ROM drive (you can also download Palm Desktop software from www.palm.com)
- Mouse
- One available USB port

Upgrade information

If you already own a Palm OS® handheld, perform a HotSync® operation with your old handheld and Palm Desktop software. Then follow the setup instructions below.

Step 1: Charge your handheld

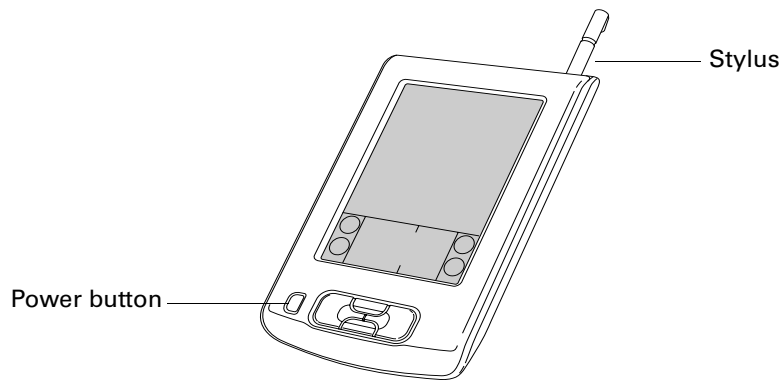
- a. Connect the charging cable to a power source.
- b. Connect your handheld to the cable for three hours for an initial charge.



To keep the battery fully charged, we recommend connecting your handheld to the cable whenever you are not using it.

Step 2: Set up your handheld

- a. After the handheld is charged, disconnect it from the cable.



- b. Press the power button to turn on your handheld.
If your handheld did not turn on, see [“Operating problems”](#) in [Appendix B](#).
- c. Slide the stylus out of the storage slot.
- d. Follow the onscreen directions.

Step 3: Install software

Installing Palm™ Desktop software on your Windows or Mac computer allows you to easily enter data on your handheld, and to transfer information between your handheld and your computer so you always have a backup copy.

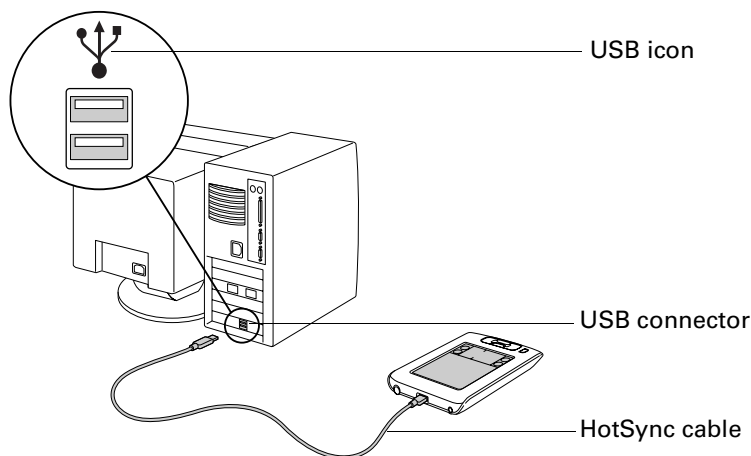
- a. After setting up your handheld, insert the Palm Desktop Software CD-ROM into your computer's CD-ROM drive.
- b. **Windows:** Follow the onscreen instructions, which guide you through installing Palm Desktop software.

Mac: Double-click the Palm Desktop CD icon that appears on the desktop, and then double-click the Palm Desktop Installer icon.

NOTE You need administrator rights to install Palm Desktop software on a computer running Windows 2000/XP or Mac OS X.

Step 4: Connect the HotSync® cable to the computer

- a. Connect the HotSync cable to your handheld.
- b. Plug the USB connector on the HotSync® cable into a USB port on your computer.

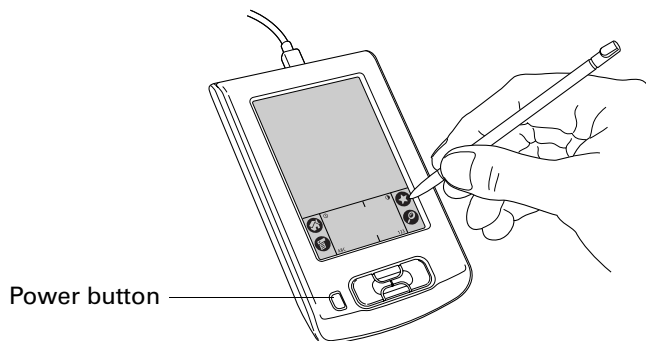


Step 5: Perform a HotSync operation

HotSync operations transfer information between your handheld and Palm Desktop software on your computer. This is called synchronizing your data. Performing HotSync operations ensures that you always have a backup copy of the information that you enter on your handheld. You can also use Palm Desktop software to enter information on your desktop computer, and then transfer the information to your handheld through a HotSync operation.

To perform a HotSync operation:

1. Connect the HotSync cable to your handheld and your computer.
2. Turn on your handheld.
3. Tap the Star icon ★ to begin the HotSync operation.



Congratulations!

You've set up your handheld, installed Palm Desktop software, and performed your first HotSync operation. The Desktop Software CD-ROM contains additional software and helpful information. Insert the CD-ROM into your computer at any time to access this information. For comprehensive information about using your handheld, continue reading this electronic handbook.

For more information about using Palm Desktop software, see the following:

- The online Help for Palm Desktop software. To access the online Help, go to the Help menu in Palm Desktop software.
- The Desktop Software CD-ROM contains additional information about your handheld. After you've installed Palm Desktop software, insert the CD-ROM into your computer at any time to access this information.
- **Mac:** The electronic *Palm Desktop Software for the Macintosh User's Guide*. To access this guide, open the Palm folder, and then open the Documentation folder. Double-click the file Palm Desktop.pdf.

Exploring Your Handheld

Your Palm™ Zire™ 21 handheld can help you stay organized, on time, and up-to-date with daily tasks while you are away from your desk. Use your new handheld to do the following:

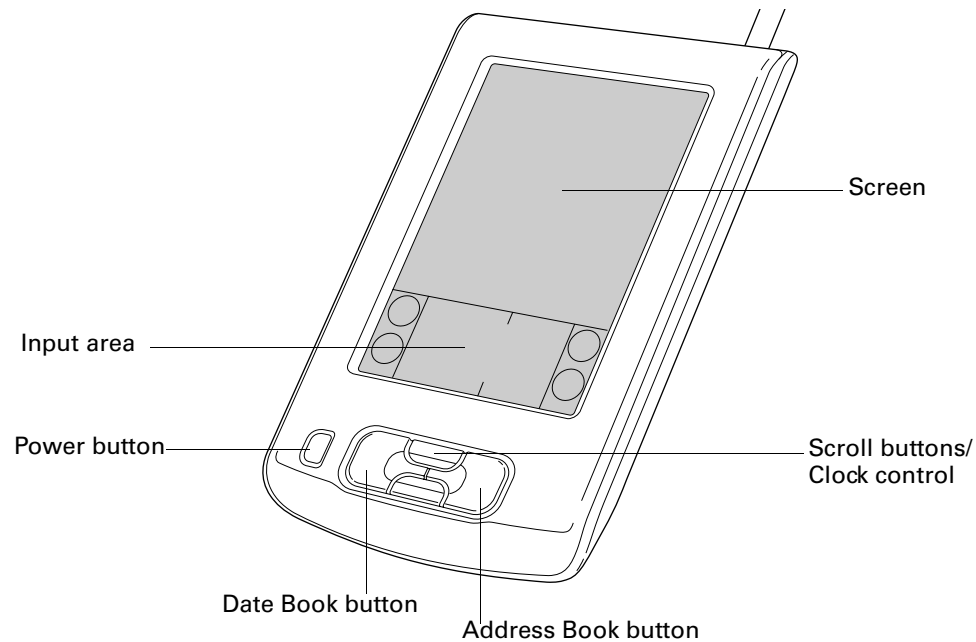
- Enter your schedule in Date Book.
- Keep all your contact names, addresses, and phone numbers in Address Book.
- Jot quick notes directly on the screen in Note Pad.
- Prioritize and assign your tasks a due date in To Do List.
- Create and view text memos in Memo Pad.
- Track your expenses and create expense reports in Expense.
- Set alarms from World Clock, Date Book, and Note Pad to keep yourself on schedule and remind yourself of appointments and notes.
- Use Palm™ Desktop software on your Windows or Mac computer to easily enter data, and to synchronize your data to your handheld so you always have a backup copy. The Palm Desktop Software CD-ROM contains software that allows you to manage your calendar contacts, tasks, and notes in Microsoft Outlook.

The software from the Desktop Software CD-ROM that comes with your handheld includes entertainment applications and productivity tools.

Locating handheld components

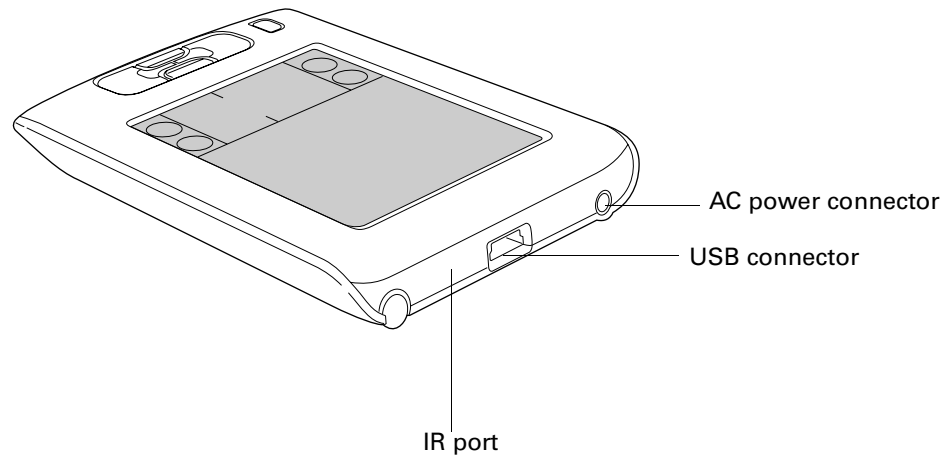
Take a few moments to learn how to access and locate the components of your handheld.

Locating front panel controls



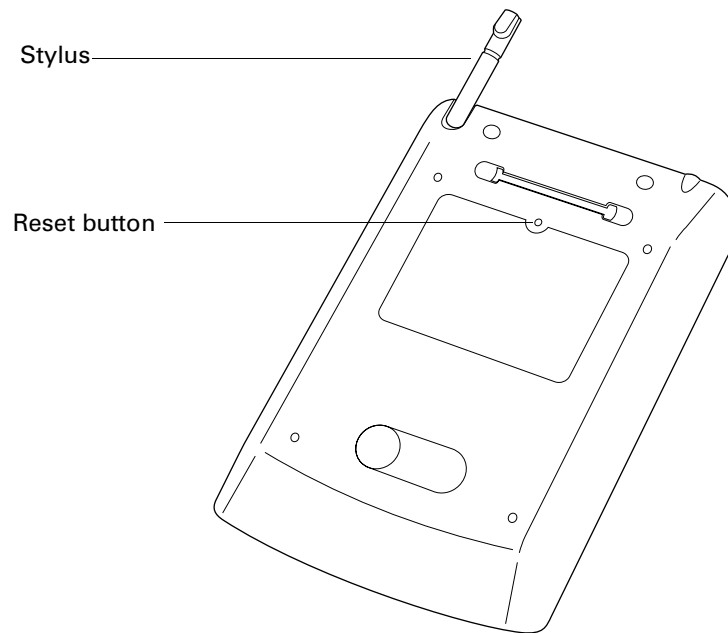
Input area	The area where you write letters and numbers using the Graffiti® 2 alphabet. See “Using Graffiti 2 writing to enter data” in Chapter 3 to learn how to write Graffiti 2 characters.
Power button	Turns your handheld on or off. If your handheld is turned off, pressing the power button turns the handheld on and returns you to the last screen you viewed.
Date Book and Address Book buttons	Press to activate the Address Book and Date Book applications.
Scroll buttons	Displays text and other information that extends beyond the handheld screen area. When your handheld is on, pressing the lower button scrolls down to view information below the viewing area, and pressing the upper button scrolls up to view information above the viewing area.
Screen	Displays the applications and information stored in your handheld. It is touch sensitive, and it responds to the stylus.

Locating top panel components



IR port	Uses infrared technology to transmit data to and receive data from other infrared-enabled devices and to perform HotSync® operations. See “Beaming data” in Chapter 3 and see “Conducting IR HotSync operations” in Chapter 13 for more information.
USB connector	Connects your handheld to the HotSync cable which connects to the USB port of your computer. This allows you to update the information between your handheld and computer using HotSync technology.
AC power connector	Connects your handheld to an electric outlet so you can charge your handheld.

Locating side and back panel components



Stylus	Slides in and out of the slot on the top of your handheld. To use the stylus, slide it out of the slot and hold it as you would a pen or pencil.
Reset button	Resets your handheld. Under normal use, you should not have to use the reset button. See “Resetting your handheld” in Appendix A for information about when and how to use the reset button.

Tapping and typing

Like using a mouse to click elements on a computer screen, using the stylus to tap elements on your handheld screen is the basic action you use to get things done on your handheld.

The first time you start your handheld, the setup instructions appear on the screen. These instructions include a calibration screen. For more information on recalibrating your screen, see [“Digitizer Preferences”](#) in [Chapter 14](#).

IMPORTANT Always use the point of the stylus for tapping or for making strokes on the handheld screen. Never use an actual pen, pencil, or other sharp object to write on the handheld screen as this will scratch the screen.

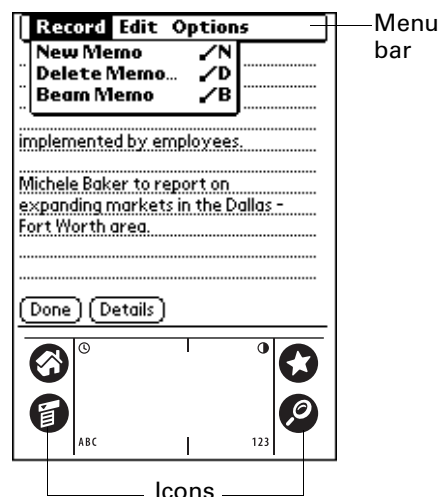
With your handheld turned on, you can tap the handheld screen to perform many operations, such as the following:

- Open applications.
- Select menu commands.
- Initiate a Find operation to search through applications installed on your handheld for specific text.
- Select options in dialog boxes.
- Open the onscreen keyboards.

Just as you can drag the mouse to select text or move objects on your computer, you can drag the stylus to select text. You can also use the stylus to drag the slider of any scroll bar.

Elements of the handheld interface

There are many common elements in the handheld interface. These elements are described in this section.



Menu bar

Tap the menu bar to access a set of application-specific commands. Not all applications have a menu bar.

Icons

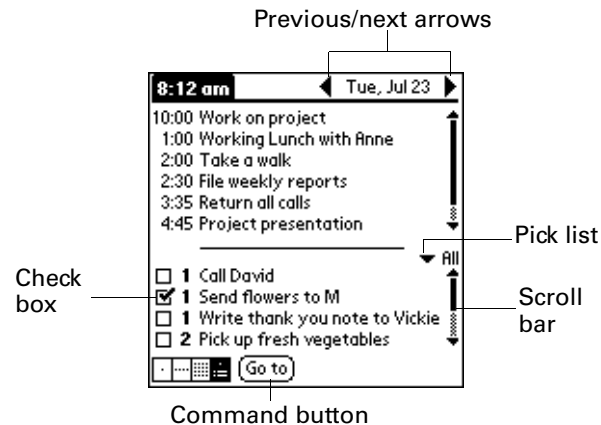
Tap the icons to display applications , open menus , perform a HotSync operation , and to find text anywhere in your data .

See [“Opening applications,” “Using menus,” and “Finding information” in Chapter 4](#), and [“Buttons Preferences” in Chapter 14](#) for more information about using these icons.

Contrast control

Tap the Contrast icon  to open the Adjust Contrast dialog box. Drag the slider to adjust the contrast.

- Clock** Tap the Clock icon  to display the current time and date. The display closes automatically after two seconds.
- ABC** With the cursor in an input field, tap ABC to activate the alphabetic keyboard.
- 123** With the cursor in an input field, tap 123 to activate the numeric keyboard.



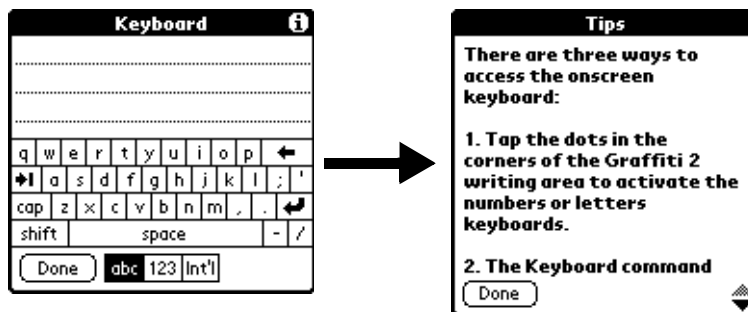
- Check box** Tap a check box to select or deselect it. When a check box contains a check mark, the corresponding option is selected and active. When a check box is empty, the corresponding option is deselected and inactive.
- Command buttons** Tap a button to perform a command. Command buttons appear at the bottom of dialog boxes and application screens.
- Previous/next arrows** Tap the left and right arrows to display the previous and next records; tap the up and down arrows to display the previous and next pages of information.
- Pick list** Tap the arrow to display a list of choices, and then tap an item in the list to select it.
- Scroll bar** Drag the slider, or tap the top or bottom arrow, to scroll the display one line at a time. To scroll to the previous page, tap the scroll bar just above the slider. To scroll to the next page, tap the scroll bar just below the slider.
- You can also scroll to the previous and next pages by pressing the upper and lower scroll buttons on the front panel of your handheld.

Displaying online tips

Many of the dialog boxes that appear on your handheld contain an online Tips icon in the upper-right corner. Online tips anticipate questions you might have in a dialog box, provide shortcuts for using the dialog box, or give you other useful information.

To display an online tip:

1. Tap the Tips icon ⓘ.
2. After you review the tip, tap Done.



Entering Data on Your Handheld

This chapter explains several ways to enter data on your handheld:

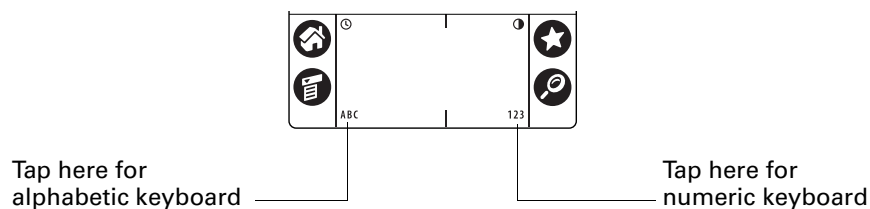
- Using the onscreen keyboard
- Using Graffiti® 2 writing
- Entering or importing data in Palm™ Desktop software and then synchronizing with your handheld
- Beaming data between devices with infrared (IR) ports
- Using Note Pad

Using the onscreen keyboard

You can open the onscreen keyboard anytime you need to enter text or numbers on your handheld. You can also use Graffiti 2 writing when the keyboard is open, which makes it easy to switch between these two methods of entering data.

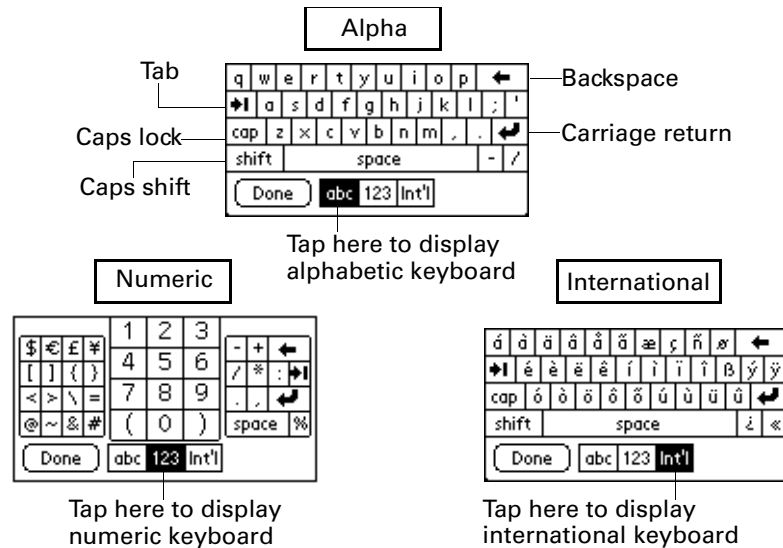
To use the onscreen keyboard:

1. Open any application (such as Memo Pad).
2. Tap an existing record, or tap New.
3. Tap ABC to open the alphabetic keyboard, or tap 123 to open the numeric keyboard.



4. Tap the characters to enter text and numbers.

When a keyboard is open, you can tap the **abc**, **123**, or **Int'l** boxes to open any of the other keyboards, including the international keyboard.



After you finish, tap **Done** to close the onscreen keyboard and place the text in the record.

Using Graffiti 2 writing to enter data

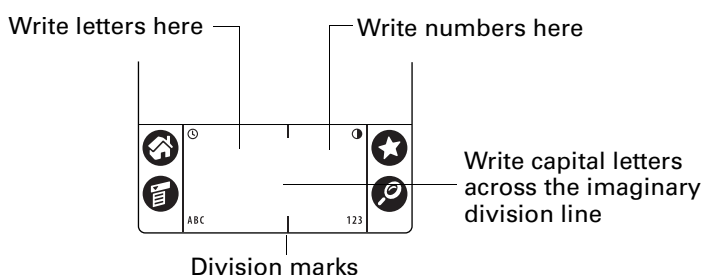
In this section you learn the procedures for creating letters, numbers, punctuation, and symbols, as well as some Graffiti 2 tips and tricks.

Most people find they can enter text quickly and accurately with only minutes of practice. Graffiti 2 writing includes any character you can type on a standard keyboard. The Graffiti 2 characters closely resemble the letters of the regular alphabet, which makes Graffiti 2 writing easy to learn. Some characters are formed using a single stroke while others are formed with more than one stroke.

There are four basic concepts for success with Graffiti 2 writing:

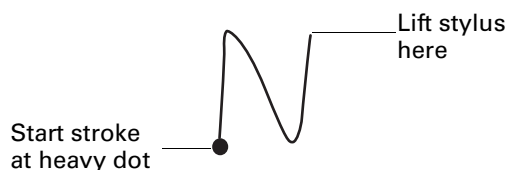
- If you draw the character shape exactly as shown in the tables later in this chapter, you can achieve close to 100 percent accuracy.
- The heavy dot on each shape shows where to begin the stroke. Certain characters have similar shapes but different beginning and end points. Always begin the stroke at the heavy dot. (You should not create the heavy dot; it is there only to show you where to begin the stroke.)

- Graffiti 2 includes symbols made with a single stroke and symbols made with multiple strokes. With some multi-stroke symbols, the first stroke is the same as a single stroke symbol. As a result, the down stroke for the letter “i” cannot be recognized as an “i” at the end of the down stroke. The “i” will not be recognized as an “i” until you enter another symbol that establishes, by its shape or position, that the down stroke was not part of a two-stroke character (such as a “t” or “k”), or until a limited time window expires. Similarly, recognition of a space symbol (a horizontal stroke from left to right) or a period symbol after a down stroke is dependent upon where the down stroke was drawn.
- The input area is divided into two parts: one for writing lowercase letters and one for writing numbers. Capital letters are formed across the imaginary line that divides the two areas. The small marks at the top and bottom of the input area indicate the two areas.



To write Graffiti 2 characters:

1. Tap the screen where you want your text to appear.
You need to tap above the input area, and you must see a blinking cursor before you write the text.
2. Use the tables on the following pages to find the stroke shape for the letter you want to create. For example, the stroke shown below creates the letter *n*.



3. Position the stylus in the left side of the input area.
4. Start your stroke at the heavy dot, and draw the stroke shape as it appears in the tables.
5. Lift the stylus from the screen at the end of the stroke shape.

When you lift the stylus from the screen, your handheld recognizes your stroke immediately and prints the letter at the insertion point on the screen.

As soon as you lift the stylus from the screen, you can begin the stroke for the next character you want to write.

To delete Graffiti 2 characters:

- Set the insertion point to the right of the character you want to delete and make the backspace stroke in the input area.

**Graffiti 2 tips**

When using Graffiti 2 writing, keep these tips in mind:

- Accuracy improves when you write large characters. Draw strokes that nearly fill the input area.
- Write at natural speed. Writing too slowly can generate recognition errors.
- Press firmly and do not write on a slant. Vertical strokes should be parallel to the sides of the input area.
- Alternate stroke shapes are available for some characters. You can use the Graffiti 2 Preferences screen to choose the one that's easiest for you. See [“Graffiti 2 Preferences”](#) in [Chapter 14](#) for details.

Graffiti 2 alphabet

The Graffiti 2 alphabet consists of the following letters:

Draw letters on LEFT side of input area			
Letter	Strokes	Letter	Strokes
A		B	
C		D	
E		F	
G		H	
I		J	
K		L	
M		N	

Draw letters on LEFT side of input area				
Letter	Strokes		Letter	Strokes
O			P	
Q			R	
S			T	
U			V	
W			X	
Y			Z	

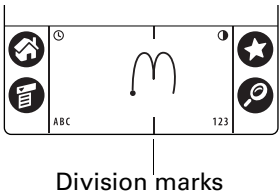
TIP A full-screen pen stroke brings up Graffiti 2 Help on your handheld. See [“Pen Preferences”](#) in [Chapter 14](#) for details.

Capital letters

Graffiti 2 writing automatically capitalizes the first letter of a new record or sentence but you can also write additional capital letters.

To write additional capital letters:

- Draw the same stroke shapes used for a lowercase letter, but write across the imaginary division line in the middle of the input area.



Graffiti 2 numbers

Writing numbers with Graffiti 2 writing is similar to writing letters of the alphabet, except that you make the character strokes on the right side (numbers side) of the input area.

Draw numbers on RIGHT side of input area			
Number	Strokes	Number	Strokes
0		1	
2		3	
4		5	
6		7	
8		9	

Punctuation marks

With Graffiti 2 writing you can create any punctuation mark that you can enter from a standard keyboard. You can write the period and comma strokes on either side of the input area. You must write other punctuation marks on a designated side of the input area. Punctuation marks that appear in the following table must be written on the left (letter) side of the input area.

Draw these marks on LEFT side of input area			
Mark	Stroke	Mark	Stroke
Period .		Ampersand &	
Comma ,		Carriage return	
Apostrophe '		At @	
Space		Straight quotes "	

Draw these marks on LEFT side of input area			
Question ?		Tab	
Exclamation !			

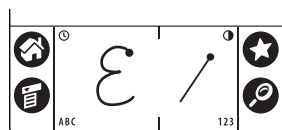
Punctuation marks that appear in the following table must be written on the right (number) side of the input area.

Draw these marks on RIGHT side of input area			
Mark	Stroke	Mark	Stroke
Period .		Backslash \	
Comma ,		Slash /	
Tilde ~		Left Paren (	
Dash —		Right Paren)	
Plus +		Equal =	
Asterisk *			

Accented characters

When writing letters with accent marks, first write the letter stroke on the left side (or in the center for uppercase letters) of the input area. Then quickly write the accent stroke on the right side of the input area.

For example, the following diagram shows the strokes required to draw an accented é.



You can use the following accent strokes in combination with Graffiti 2 letters:

Draw accents on RIGHT side of input area			
Accent	Stroke	Accent	Stroke
Acute á		Dieresis ä	
Grave à		Circumflex â	
Tilde ã		Ring å	

Using these accent strokes, you can write the following accented letters:

à á â ã ä å è é ê ë ì í î ï ò ó ô õ ö ù ú û ü ÿ ý ñ

Symbols and other special characters

You can write symbols and other special characters using the Punctuation Shift stroke.

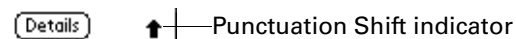
NOTE You can also use the Punctuation Shift stroke to write punctuation marks.

To write symbols and special characters:

1. Enter the Punctuation Shift stroke:

Punctuation Shift	
-------------------	--

When Punctuation Shift is active, an up arrow symbol appears in the lower-right corner of the handheld screen. If you accidentally activate Punctuation Shift, immediately enter the Punctuation Shift stroke again to cancel it, or wait a moment and it will automatically disappear.

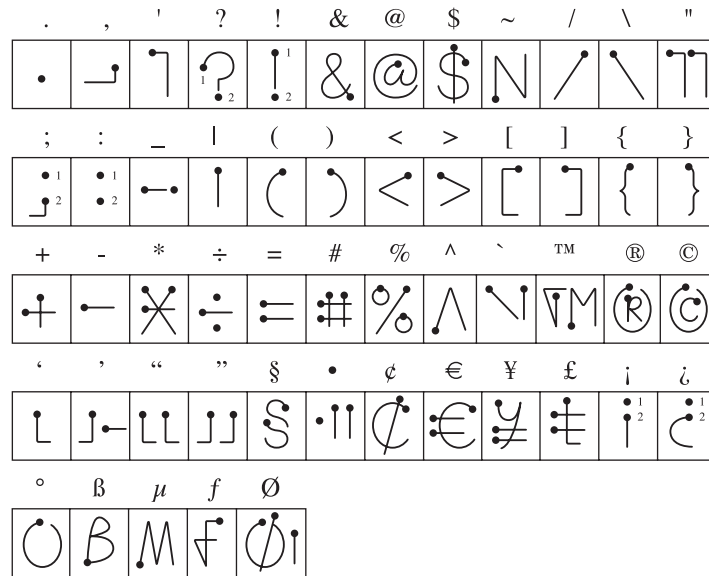


2. Write the symbol or other special character shown in the table that follows. You can make a symbol stroke anywhere in the input area.

3. (Optional) Enter an additional Punctuation Shift stroke to finish writing the character and to make the character appear more quickly.

After the arrow disappears, the symbol appears.

Draw symbols on EITHER side of the input area



Graffiti 2 Gestures

Gestures enable you to use editing commands. To use gestures, draw the following strokes on the left (letter) side of the input area:

Draw gestures on LEFT side of input area			
Gesture	Stroke	Gesture	Stroke
Cut		Paste	
Copy		Undo	

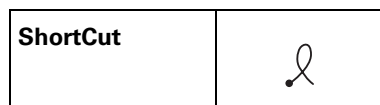
Graffiti 2 ShortCuts

Graffiti 2 ShortCuts make entering commonly used words or phrases quick and easy. ShortCuts are similar to the Glossary or Autotext features of some word processors.

Graffiti 2 writing comes with several predefined ShortCuts, and you can also create your own. Each ShortCut can represent up to 45 characters. For example, you might create a ShortCut for your name or for the header of a memo.

See [“ShortCuts Preferences”](#) in [Chapter 14](#) to learn about creating ShortCuts.

To use a ShortCut, draw the ShortCut stroke followed by the ShortCut characters. The ShortCut symbol appears at the insertion point to show that you are in ShortCut mode.



Your handheld includes the predefined Graffiti 2 ShortCuts shown in the following table.

Entry	Shortcut
Date Stamp	ds
Time stamp	ts
Date / time stamp	dts
Meeting	me
Breakfast	br
Lunch	lu
Dinner	di

Full-screen writing area

When Writing Area Preferences are turned on and active, you do not have to write in the input area. You can write letters anywhere on the left side of the screen, or write numbers anywhere on the right side of the screen. Capital letters are formed in the middle of the screen straddling the imaginary dividing line between the left and right sides.

When Writing Area Preferences are turned off or inactive, you must write character strokes in the input area for your handheld to recognize them.

To use the full-screen writing area:

1. Turn on Writing Area Preferences. See [“Writing Area Preferences”](#) in [Chapter 14](#) for details.
2. Open the application in which you want to use the full-screen writing area.
A shaded box appears in the lower-right corner of the screen.

3. Position the cursor where you want the characters to appear.
4. Do any of the following:
 - Write lowercase Graffiti 2 letters anywhere on the left side of the screen.
 - Write numbers anywhere on the right side of the screen.
 - Write uppercase letters in the middle of the screen.
 - Write the Punctuation Shift stroke before writing symbols and other special characters.
 - Access buttons and other controls that appear on the screen by tapping and holding the control until it activates.

To temporarily disable the full-screen writing area:

- Tap the shaded box in the lower-right corner.

The shaded box changes to a box outline and Writing Area Preferences are deactivated.

Using your computer keyboard

If you have a lot of data to enter, or prefer to use the computer keyboard, you can use Palm Desktop software or any supported personal information manager (PIM) to enter information. You can then perform a HotSync® operation to synchronize the information on your computer with the information on your handheld. Many of the applications that came with your handheld are also available in Palm Desktop software and in most PIMs, so you don't need to learn different applications. For more information on entering data on your computer, refer to the online Help in Palm Desktop software and the *Palm Desktop Software for the Macintosh User's Guide* on the Desktop Software CD-ROM.

Importing data

If you have data stored in computer applications such as spreadsheets and databases, or if you want to import data from another handheld, you can transfer the data to your handheld without having to type it. Save the data in one of the file formats listed in the next section, import it into Palm Desktop software, and then perform a HotSync operation to transfer the data to your handheld.

Importing data from a Windows computer

Palm Desktop software can import data in the following file formats:

- Comma-delimited (.csv, .txt): Address Book and Memo Pad only
- Tab-delimited (.tab, .tsv, .txt): Address Book and Memo Pad only
- CSV (Lotus Organizer 2.x/97 Mapping): Address Book only
- vCal (.vcs): Date Book only

- vCard (.vcf): Address Book only
- Date Book archive (.dba)
- Address Book archive (.aba)
- To Do List archive (.tda)
- Memo Pad archive (.mpa)

Archive formats can be used only with Palm Desktop software. Use the archive file formats to share information with other people who use a Palm OS® handheld or to create a copy of your important Palm Desktop information.

To import data from a Windows computer:

1. Open Palm Desktop software.
2. Click the application into which you want to import data.
3. If you are importing records that contain a field with category names, do the following:

Select All in the Category box.

Be sure that the same categories that appear in the imported file also exist in the application. If the categories do not exist, create them now; otherwise, the records are imported into the Unfiled category.

4. From the File menu, select Import.
5. Select the file you want to import.
6. Click Open.

If you are importing a vCal or vCard file, skip to step 10. You do not have to specify which fields correspond to the imported data.

7. To import data into the correct Palm Desktop fields, drag fields in the left column so that they are opposite the corresponding imported field on the right.
8. If you don't want to import a field, click the check box for that field to deselect it.
9. Click OK.

The imported data is highlighted in the application.

10. To add the imported data to your handheld, perform a HotSync operation.

See Palm Desktop online Help for more information on importing and exporting data.

Using File Link

The File Link feature enables you to import Address Book and Memo Pad information, such as a company phone list, to your handheld from a separate external file on your Windows computer. You can configure the File Link feature to check for changes to the external file when you perform a HotSync operation. HotSync Manager stores the data in a separate category in Palm Desktop software and on your handheld.

With File Link, you can import data stored in any of the following formats:

- Comma-separated (*.csv)
- Memo Pad archive (*.mpa)
- Address Book archive (*.aba)
- Text (*.txt)

For information on how to set up a file link, see the Palm Desktop online Help.

Importing data from a Mac computer

Palm Desktop software can import data from any applications that can export the data in any of the following file formats:

- Tab-delimited file
- Text
- Palm Desktop software for Mac
- vCal (.vcs)
- vCard (.vcf)

For example, you can export tab-delimited files from applications such as: FileMaker Pro, Meeting Maker, Now Contact, and Now Up-to-Date.

To import data from a Mac computer:

1. Open Palm Desktop software.
2. From the File menu, select Import.
3. Select the file you want to import.
4. Click Open.
5. If you want to change the order of the fields you're importing, point to a field, wait for the cursor to change to a double arrow, and then drag the field to a new location.

6. If you do not want to import a field, click the arrow between the field names.
7. From the Fields pop-up menu, select the appropriate field.
8. From the Delimiters pop-up menu, select the appropriate delimiter.
9. Click OK.
10. To add the imported data to your handheld, perform a HotSync operation.

See Palm Desktop online Help for more information on importing and exporting data.

Beaming data

Your handheld is equipped with an IR port that is located at the top of the handheld, behind the small dark shield. The IR port supports the IrCOMM implementation of the standards for infrared communication established by the Infrared Data Association (IrDA). This means that you can beam data to any nearby device that supports the IrCOMM implementation of the IrDA standards and that can read the type of data you're beaming. For example, you can beam an Address Book entry to a Palm OS handheld, a mobile phone, or a computer that's equipped with an IR port and that can read vCard data.

You can beam the following information between devices with an IR port:

- The record currently displayed in Date Book, Address Book, Note Pad, To Do List, or Memo Pad
- All records of the category currently displayed in Address Book, To Do List, Note Pad, or Memo Pad
- A special Address Book record that you designate as your business card, containing information you want to exchange with business contacts
- An application installed in RAM memory

TIP You can also perform HotSync operations using the IR port.
See ["Conducting IR HotSync operations"](#) in [Chapter 13](#) for more details.

To select a business card:

1. Create an Address Book record that contains the information you want on your business card.
2. Tap the Menu icon .
3. In the Record menu, tap Select Business Card.
4. Tap Yes.

To beam a record, business card, or category of records:

1. Locate the record, business card, or category you want to beam.
2. Tap the Menu icon .
3. Tap one of the following from the Record menu:
 - The Beam command for an individual record.
 - In Address Book only: Beam Business Card.
 - In Note Pad only: If you are beaming to someone using an earlier version of Note Pad, tap Compatibility, and then tap Beam.
 - Beam Category.

TIP You can also press and hold the Address Book application button to instantly beam your business card to another device with an IR port.

4. When the Beam Status dialog box appears, point the IR port directly at the IR port of the receiving device.

For best results, Palm™ handhelds should be between 10 centimeters (approximately 4 inches) and 1 meter (approximately 39 inches) apart, and the path between the two handhelds must be clear of obstacles. The beaming distance to other devices may be different.



5. Wait for the Beam Status dialog box to indicate that the transfer is complete before you continue working on your handheld.

To beam an application:

1. Open the Home screen.
2. Tap the Menu icon .
3. From the App menu, tap Beam.
4. Tap the application you want to transfer.

Some applications are copy-protected and cannot be beamed. These are listed with a lock icon next to them.

5. Tap Beam.
6. When the Beam Status dialog box appears, point the IR port directly at the IR port of the receiving device.
7. Wait for the Beam Status dialog box to indicate that the transfer is complete before you continue working on your handheld.

To receive beamed information:

1. Turn on your handheld.
2. Point the IR port directly at the IR port of the transmitting device to open the Beam dialog box.
3. (Optional) Tap the category pick list and select a category for the incoming information. You can also create a new category or leave the information unfiled.



4. Tap Yes.

Beaming tips

- You can set the full-screen pen stroke to beam the current entry. See [“Pen Preferences”](#) in [Chapter 14](#) for more information.
- You can draw the Graffiti 2 Command stroke to activate the Command toolbar, and then tap the beam icon.
- You can use the Graffiti 2 Command stroke “/ B” to beam the current entry.

Using Note Pad

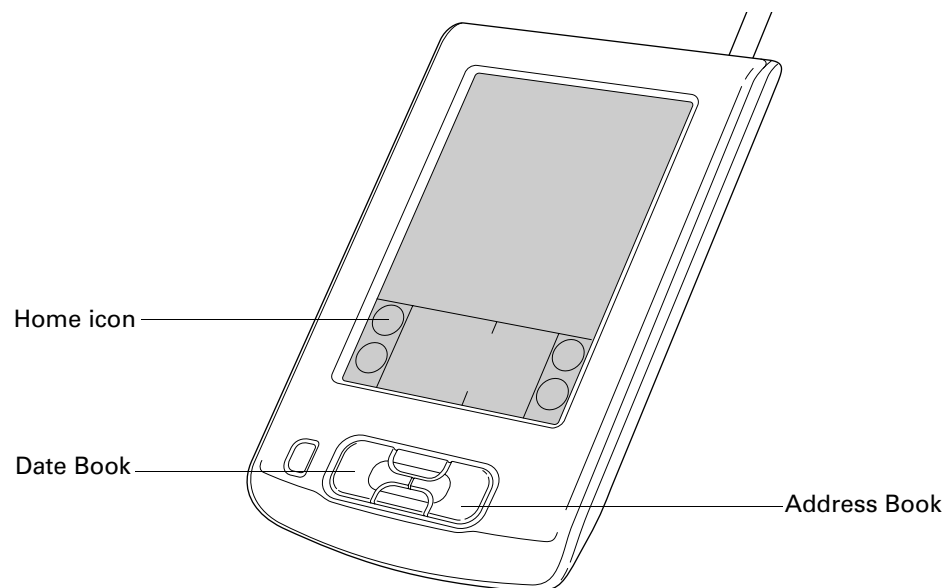
In addition to using Graffiti 2 characters and the onscreen keyboard, you can enter data on your handheld using the Note Pad application. When you use Note Pad, you write quick notes directly on the handheld screen in your own handwriting. See [Chapter 10](#) for more information and instructions.

Working with Applications

This chapter explains how to open and switch between applications on your handheld, how to change application settings so they are personalized to your work methods, and how to categorize applications so you view them in related groups.

Opening applications

You can tap the Home icon to display the applications installed on your handheld. To open an application, just tap the application's icon. You can also press the Date Book and Address Book buttons to turn on your handheld and automatically open these applications.



In addition to providing a way for you to open applications, the Home screen displays the current time, battery level, and application category.

To open an application on your handheld:

1. Tap the Home icon .



2. Tap the icon of the application that you want to open. If you have many applications installed on your handheld, tap the scroll bar to see all your applications.

You can also open an application from the Home screen by writing the Graffiti® 2 character for the first letter of its name. The Home screen scrolls to the first application with a name that begins with that letter.

Switching between applications

When working with any application, select the Home icon  or press an application button on your handheld to switch to another application. Your handheld automatically saves your work in the current application and displays it when you return to that application.

Categorizing applications

The category feature allows you to manage the number of application icons that appear in the Home screen. You can assign an application to a category and then display a single category or all your applications.

By default, your handheld includes system-defined categories, such as All and Unfiled, and user-defined categories, such as Games, Main, and System.

You cannot modify the system-defined categories, but you can rename and delete the user-defined categories. In addition, you can create your own user-defined categories. You can have a maximum of 15 user-defined categories.

To categorize an application:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Category on the App menu.

4. Tap the pick list next to each application to select a category.

TIP To create a new category, tap Edit Categories from the pick list. Tap New, enter the category name, and then tap OK to add the category. Tap OK again to close the Edit Categories dialog box.

5. Tap Done.

To display applications by category:

1. Tap the Home icon .
2. Do one of the following:
 - Tap the Home icon  repeatedly to cycle through all your categories.
 - Tap the pick list in the upper-right corner of the screen, and select the category you want to display.

Changing the Home screen display

By default, the Home screen displays each application as an icon. As an alternative, you can choose to show a list of applications. You can also choose to view the same category of applications each time you open the Home screen.

To change the Home screen display:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Options, and then select Preferences.
4. Tap the View By pick list and select List.
5. Tap OK.

To open the Home screen to the last opened category:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Options, and then select Preferences.
4. Tap the Remember Last Category check box to select it.
5. Tap OK.

Selecting copy settings

When using the copy feature, you can set the following:

- How applications are sorted and listed
- Whether to copy only the application or both the application and its data files

To select copy settings:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Copy on the App menu.
4. Tap Settings.
5. Tap the Sort By pick list and select Name or Size.
6. Tap the Copy Application Only check box to select it if you want to copy only the application files. Leave it deselected if you want to copy both the application file and its associated data file(s).
7. Tap OK.

NOTE The Sort By setting is in effect each time you use the copy feature. Each time you want to copy an application only, you must select the Copy Applications Only check box.

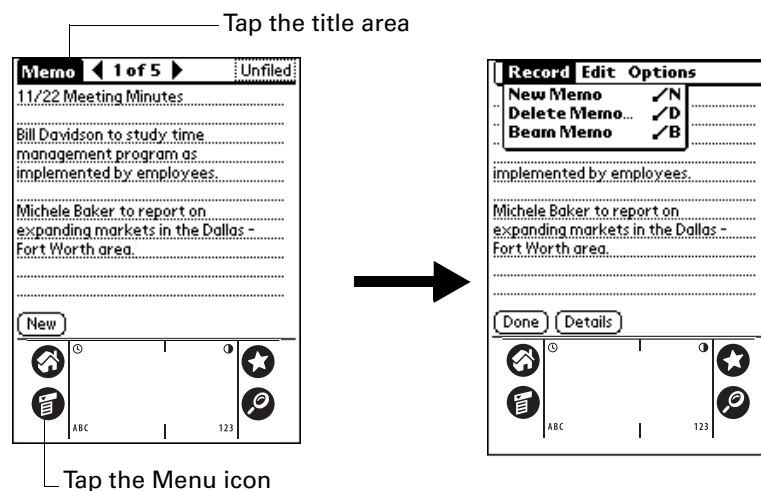
Using menus

Menus on your handheld are easy to use. Once you have mastered them in one application, you can use them the same way in all other applications.

Some of the menus in each application may be illustrated in the chapter that discusses that application.

To open the menu bar:

1. Open an application (such as Memo Pad).
2. Do one of the following:
 - Tap the Menu icon .
 - Tap the highlighted title area at the top of the screen.



Choosing a menu

The menus and menu commands that are available depend on the application that is currently open. Also, the menus and menu commands vary depending on *which* part of the application you're currently using. For example, in Memo Pad, the menus are different for the Memo list screen and the Memo record screen.

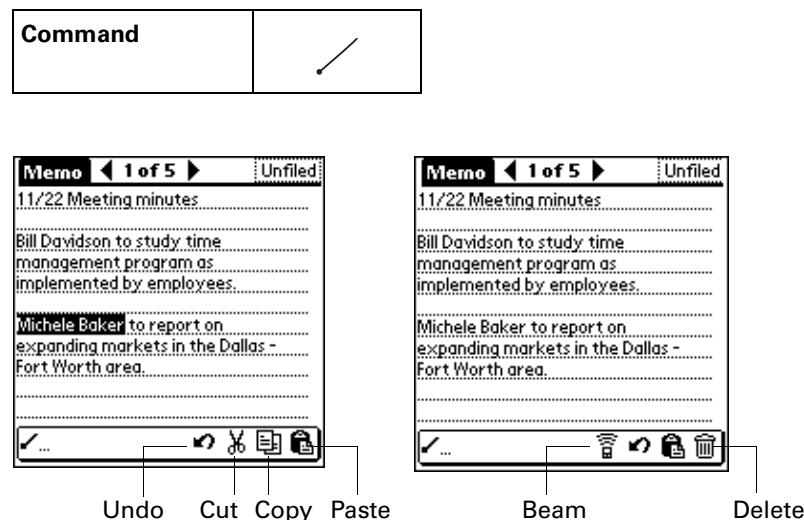
To select a menu command with the stylus:

1. Open the menu bar for an application.
2. Tap the menu that contains the command you want to use.
3. Tap the command you want to use.

Graffiti 2 menu commands

Most menu commands have an equivalent Graffiti 2 Command stroke, which is similar to the keyboard shortcuts used to execute commands on computers. The command letters appear to the right of the command names.

When you draw the Command stroke anywhere in the input area, the Command toolbar appears just above the input area to indicate that you are in Command mode.



The Command toolbar displays context-sensitive menu commands for the active screen. For example, if text is selected, the menu icons displayed may be Undo, Cut, Copy, and Paste. Tap an icon to select the command, or immediately write the corresponding command letter for an appropriate command in the input area.

For example, to select Paste from the Edit menu, draw the Command stroke, followed by the letter *p*.

Command mode is active only for a short time, so you must tap an icon or write the command letter immediately to select the menu command.

Choosing application preferences

You can set options that affect an entire application in the application's Preferences dialog box.

To change preferences for an application:

1. Open an application.
2. Tap the Menu icon .
3. Select Options, and then select Preferences.

NOTE Not all applications have a Preferences command.

4. Make changes to the settings.
5. Tap OK.

Performing common tasks

The tasks described in this section use the term *records* to refer to an individual item in any of the applications: a single Date Book event, Address Book entry, Note Pad note, To Do List item, Memo Pad memo, or Expense item.

Creating records

You can use the following procedure to create a new record in Date Book, Address Book, To Do List, Note Pad, Memo Pad, and Expense.

To create a record:

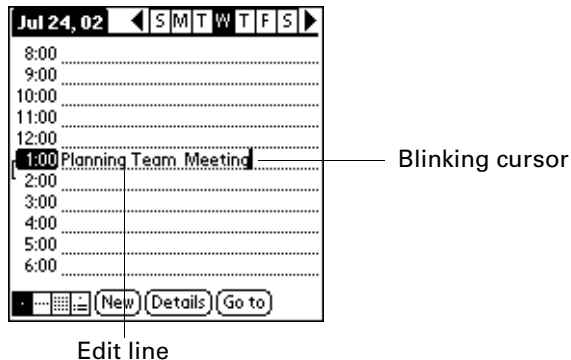
1. Select the application in which you want to create a record.
2. Tap New.
3. In Date Book only: Select start and end times for your appointment, and tap OK.
4. Enter text for the record.
5. (Optional) Tap Details to select attributes for the record. (In Note Pad the Details command is located on the Options menu.)
6. In Address Book, Note Pad, and Memo Pad only: Tap Done.

There's no need to save the record because your handheld saves it automatically.

Editing records

After you create a record, you can change, delete, or enter new text at any time. Two screen features tell you when your handheld is in Edit mode:

- A blinking cursor
- One or more dotted edit lines



NOTE In Note Pad you can write anywhere on the screen. Therefore, you will not see an edit line or blinking cursor unless the cursor is in the title line.

Entering text

For information on how to enter text using Graffiti 2 writing, the onscreen keyboard, or the keyboard attached to your computer, see [Chapter 3](#). For information on entering text in Note Pad, see [Chapter 10](#).

Using the Edit menu

The Edit menu is available with any screen where you enter or edit text. In general, commands available in the Edit menu apply to text that you *select* in an application.

To select text in an application:

1. Tap the beginning of the text that you want to select.
2. Drag the stylus over the text to highlight it (in yellow).

NOTE You can also double-tap to select a word, or triple-tap to select a line of text. You can also drag *across* the text to select additional words, or drag *down* to select a group of lines.

The following commands may appear in an Edit menu:

- | | |
|-------------|--|
| Undo | Reverses the action of the <i>last edit</i> command. For example, if you used Cut to remove text, Undo restores the text you removed. Undo also reverses deletions you made using backspace. |
| Cut | Removes the selected text and stores it temporarily in the memory of your handheld. You can paste the text you cut into another area of the current application or into a different application. |

Copy	Copies the selected text and stores it temporarily in the memory of your handheld. You can paste the text that you copy into another area of the current application or into a different application.
Paste	Inserts the text that you cut or copied at the selected point in a record. The text you paste replaces any selected text. If you did not previously cut or copy text, Paste does nothing.
Select All	Selects all of the text in the current record or screen. This enables you to cut or copy all of the text and paste it elsewhere.
Keyboard	Opens the onscreen keyboard. After you finish with the onscreen keyboard, tap Done.
Graffiti 2 Help	Opens screens that show all the Graffiti 2 character strokes. Use this command anytime you forget a stroke for a character.

Deleting records

To delete a record:

1. Select the record you want to delete.
2. Tap the Menu icon .
3. Select the Delete command on the Record menu.
4. Tap OK.

If you chose to save a copy of the selected item, your handheld transfers it to the archive file on your desktop the next time you perform a HotSync® operation.

To delete a record using an alternate method:

- Delete the text of the record.
- In Date Book, Address Book, To Do List, and Memo Pad, open the Details dialog box for the record, tap Delete, and then tap OK.

NOTE When deleting a repeating event in Date Book, you can choose to delete the current repeating event, current and future events, or all instances of that event.

- In Note Pad, open the note you want to delete, and then tap Delete.

Purging records

Over time, as you use Date Book, To Do List, and Expense, you'll accumulate records in these applications that have outlived their usefulness. For example, events that occurred months ago remain in the Date Book, and To Do List items that you marked as completed remain in the list, as do Expense items.

All these outdated records take up memory on your handheld, so it's a good idea to remove them by using Purge. If you think Date Book or To Do List records might prove useful later, you can purge them from your handheld and save them in an archive file on your computer.

Purging is not available in Address Book, Note Pad, or Memo Pad. You must delete outdated records manually from these applications.

To purge records:

1. Open the application.
2. Tap the Menu icon .
3. Select Purge on the Record menu.

A confirmation dialog box appears.

Date Book: Tap the pick list and select how old a record must be to be purged. Purge deletes repeating events if the last of the series ends before the date that you purge records.

Date Book, To Do List: If you want to save a copy of the purged records to an archive file on your desktop, be sure that the check box is selected. If you don't want to save a copy, tap the check box to deselect it.

Expense: Select the category you want to purge. All data in the selected category will be purged and there is no archive option.

4. Tap OK, or in Expense, tap Purge.

If you chose to save a copy of the purged records, your handheld transfers them to an archive file on your desktop the next time you perform a HotSync operation.

NOTE Purging does not happen automatically. You must select the command to make it happen.

Categorizing records

You can organize records in the Address Book, Note Pad, To Do List, Memo Pad, and Expense applications so that they are grouped logically into categories and are easy to review.

When you create a record, your handheld automatically places it in the category that is currently displayed. If the category is All, your handheld assigns it to the Unfiled category. You can leave an entry as Unfiled or assign it to a category at any time.

By default, your handheld includes system-defined categories, such as All and Unfiled, and user-defined categories, such as Business and Personal.

You cannot modify the system-defined categories, but you can rename and delete the user-defined categories. In addition, you can create your own user-defined categories. You can have a maximum of 15 user-defined categories in each application.

Address Book contains the QuickList user-defined category, in which you can store the names, addresses, and phone numbers you might need in emergencies (doctor, fire department, lawyer, and so on).

Expense contains two user-defined categories, New York and Paris, to show how you might sort your expenses according to separate business trips.

The illustrations in this section come from Address Book, but you can use these procedures in all the applications in which categories are available.

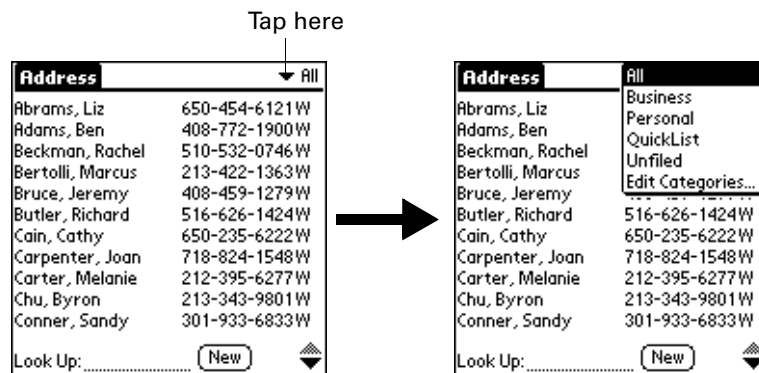
To move a record into a category:

1. Select the record you want to categorize.
2. In Address Book only: Tap Edit.
3. Tap Details.
4. Tap the Category pick list to display the list of available categories.
5. Select the category for the record.
6. Tap OK.

NOTE In Address Book, Note Pad, and Memo Pad you can select the category name in the upper-right corner of the screen to assign the item to a different category.

To display a category of records:

1. Tap the category pick list in the upper-right corner of the list screen.



NOTE In the Date Book Agenda view, the pick list is in the upper right of the To Do list.

2. Select the category you want to view.

The list screen now displays only the records assigned to that category.

TIP Pressing an application button on your handheld scrolls through all the categories of that application except for Unfiled. This feature is not available in Date Book.

To define a new category:

1. Tap the category pick list in the upper-right corner of the screen or list.
2. Select Edit Categories.
3. Tap New.



4. Enter the name of the new category, and then tap OK.
5. Tap OK.

You can assign any of your records to the new category.

To rename a category:

1. Tap the category pick list in the upper-right corner of the screen or list.
2. Select Edit Categories.
3. Select the category that you want to rename, and then tap Rename.
4. Enter the new name for the category, and then tap OK.
5. Tap OK.

TIP You can group the records within two or more categories into one category by giving the categories the same name. For example, if you change the name of the Personal category to Business, all records formerly in the Personal category appear in the Business category.

Finding information

Your handheld offers several ways for you to find information quickly:

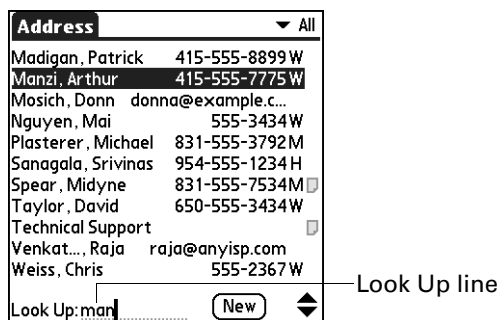
- **All applications that reside on your handheld:** Find locates any text that you specify, always starting with the current application.
- **Date Book, To Do List, Memo Pad:** Phone Lookup displays the Address list screen and enables you to add to a record the information that appears in this list.
- **Address Book:** The Look Up line enables you to scroll immediately to a name when you enter the first letters of that name.
- **Expense:** Lookup displays the names in your Address Book that have data in the Company field. You can add these names to a list of attendees associated with an Expense record.

Looking up Address Book records

In Address Book you can use the Look Up line with the stylus to look up and quickly scroll to any of your Address Book entries.

To look up an Address Book record with the stylus:

1. From the Address list screen, enter the first letter of the name you want to find.



The list scrolls to the first entry that begins with that letter. If you write another letter, the list scrolls to the first entry that starts with those *two* letters. For example, writing an *s* scrolls to “Sands,” and writing *sm* scrolls further to “Smith.” If you sort the list by company name, the Look Up feature scrolls to the first letter of the company name.

2. Tap the record to view its contents.

Using Find

You can use Find to locate any text that you specify, in any application that resides on your handheld.

To use Find:

1. Tap the Find icon .

TIP If you select text in an application before you tap Find, the selected text automatically appears in the Find dialog box.

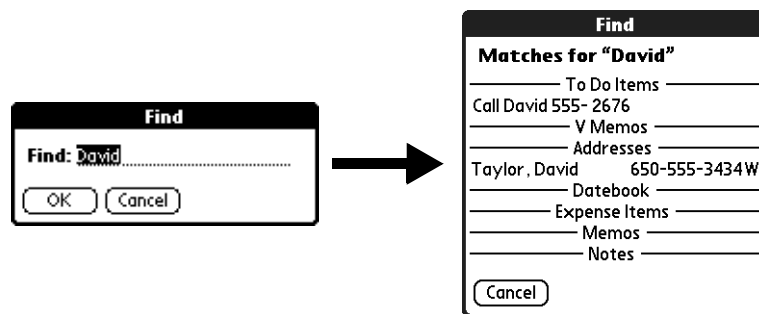
2. Enter the text that you want to find.

Find is *not* case sensitive. For example, searching for the name “davidson” also finds “Davidson.”

Find locates any words that begin with the text you enter. For example, searching for “plane” finds “planet” but not “airplane.”

3. Tap OK.

Find searches for the text in all records and all notes.



As your handheld searches for the text, you can tap Stop at any time. You may want to do this if the entry you want appears before your handheld finishes the search. To continue the search after you tap Stop, tap Find More.

4. Tap the text that you want to review.

Using Phone Lookup

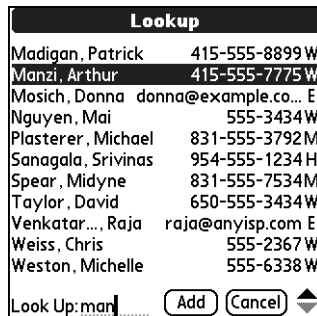
Phone Lookup displays the Address list screen. You can insert the information from an Address Book record to another application, such as Date Book.

To use Phone Lookup:

1. Display the record in which you want to insert a phone number. The record can be in Date Book, To Do List, Memo Pad, or any other application that takes advantage of this feature.
2. Tap the Menu icon .
3. Select Options, and then select Phone Lookup.

4. Begin to spell the last name of the name you want to find.

The list scrolls to the first record in the list that starts with the first letter you enter. Continue to spell the name you're looking for, or when you see the name, tap it.



5. Tap Add.

The name you selected, along with the information associated with it, is pasted into the record you selected in step 1.

Using Graffiti 2 commands with Phone Lookup

Write the Graffiti 2 Command stroke “/L” to activate the Phone Lookup feature. You can also activate it in the following circumstances:

- **While entering text:** For example, to insert the full name and phone number for someone with the last name Williams, write the Graffiti 2 characters for *Wi* and then the Phone Lookup Command stroke “/L.”

If you have only one Address Book record that begins with *Wi*, your handheld inserts the full name, such as Fred Williams (and its associated information). If you have more than one name that begins with *Wi*, the Phone Lookup screen appears and highlights the first record that begins with *Wi*.

- **For selected text:** Drag to highlight the text, and then write the Phone Lookup Command stroke “/L.” Your handheld replaces the selected text and adds the name and its associated information.

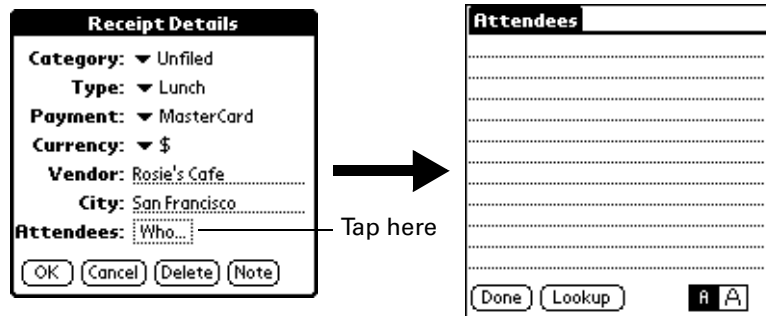
Looking up names to add to Expense records

In Expense, Lookup displays the names in your Address Book that have data in the Company field. You can add these names to a list of attendees associated with an Expense record.

To add names to an Expense record:

1. Tap the Expense record to which you want to add names.
2. Tap Details.

3. Tap Who.



4. Tap Lookup.

The Attendees Lookup screen displays all the names in your Address Book that have data in the Company field.

5. Select the name you want to add, and then tap Add.

The name appears in the Attendees screen.

6. Repeat steps 4 and 5 to add more names.
7. Tap Done.
8. Tap OK.

Sorting lists of records

You can sort lists of records in various ways, depending on the application. Sorting is available in applications that have list screens: Address Book, Note Pad, To Do List, Memo Pad, and Expense.

NOTE You can also assign records to categories. See [“Categorizing records”](#) earlier in this chapter.

To sort records in To Do List and Expense:

1. Open the application to display the list screen.
2. Tap Show.
3. Tap the Sort by pick list and select an option.
4. Tap OK.

To sort records in Address Book, Note Pad, and Memo Pad:

1. Open the application to display the list screen.
2. Tap the Menu icon .
3. Select Options, and then select Preferences.

4. Do one of the following:

Address Book: Tap the setting you want.

Note Pad: Tap the Sort by pick list and select Alphabetic, Date, or Manual.

Memo Pad: Tap the Sort by pick list and select Alphabetic or Manual.

5. Tap OK.

To sort the Note Pad or Memo list manually, tap and drag a note or memo to a new location in the list.

To make the list appear in Palm™ Desktop software as you manually sorted it on your handheld, open the application in Palm Desktop software and click Sort by. Then select Order on Handheld.

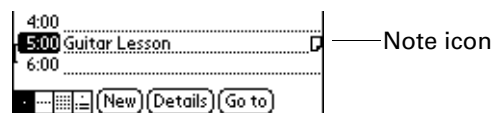
Attaching notes

In Address Book, Date Book, To Do List, and Expense, you can attach a note to a record. A note can be up to several thousand characters long. For example, for an appointment in Date Book, you can attach a note with directions to the location.

To attach a note to a record:

1. Display the entry to which you want to add a note.
2. In Address Book only: Tap Edit.
3. Tap Details.
4. Tap Note.
5. Enter your note.
6. Tap Done.

A small note icon appears at the right side of any item that has a note.



To review or edit a note:

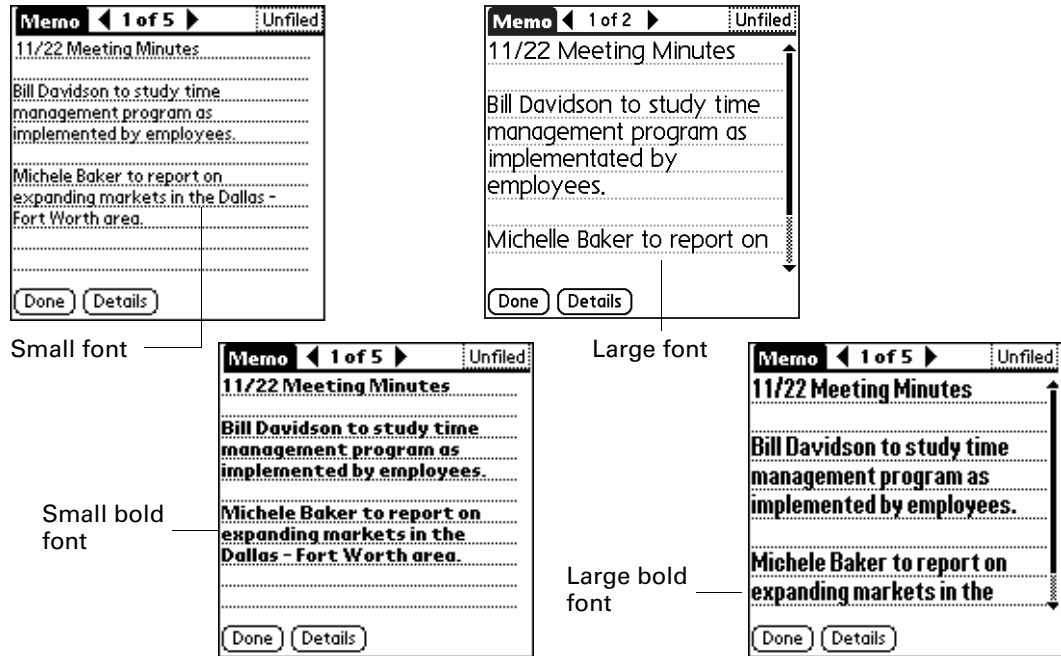
- Tap the Note icon .

To delete a note:

1. Tap the Note icon .
2. Tap Delete.
3. Tap Yes.

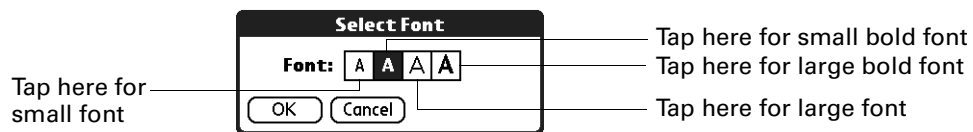
Choosing fonts

In many applications, you can change the font style to make text easier to read. You can choose small, small bold, large, or large bold fonts in each application that enables you to change the font style.



To change the font style:

1. Open an application.
2. Tap the Menu icon .
3. Select Options, and then select Font.
4. Tap the font style you want to use.



5. Tap OK.

Receiving alerts

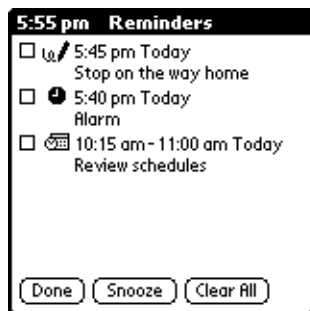
You can receive alerts on your handheld and in Palm Desktop software.

Receiving alerts on your handheld

When you use certain application settings, your handheld can alert you to any of the following:

- An appointment set in Date Book
- A note created in Note Pad
- An alarm set in World Clock

When an alert occurs, your handheld displays a reminder message. If you tap Snooze in response to an alert message, your handheld reminds you of the item again in five minutes. The Reminder screen displays alerts that await attention.



To respond to alerts, do one of the following:

- Select an item's check box to clear the item.
- 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 will blink in the upper-left corner of the screen; tap it to view the alert list again.
- Tap Snooze to see the list again in five minutes.

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

- Tap Clear All to dismiss all alerts in the list.

Receiving alerts from Palm Desktop software

You can also set an option to receive Date Book event alerts from Palm Desktop software. The feature is disabled by default, so you must enable it within Palm Desktop software.

To enable an event alert from Palm Desktop software:

1. Double-click the Palm Desktop icon.
2. From the Tools menu, select Options, and then select Alarms.
3. Set Alarm Configuration options, either Always Available or Available only when the Palm Desktop is running.
4. (Optional) To hear an alert sound as well as receive an alert message, select the check box Play audible notification with alarm dialog box.
5. Click OK.

Hiding or masking private records

You can use the Security Preferences to set a password and select whether to mask your private records or hide them completely. See “[Security Preferences](#)” in [Chapter 14](#) for details.

Installing and removing applications

This section explains how to install and remove applications and other files on your handheld, and how to remove Palm Desktop software from your computer.

Installing files and add-on applications

Your handheld comes with many applications installed and ready to use. During a HotSync operation you can also install additional applications, such as games and other software, on your handheld. Applications or games that you install on your handheld reside in RAM memory, and you can delete them at any time.

Files that are not associated with an application on your handheld may not be installed during a HotSync operation.

Both applications and files are easy to install during a HotSync operation. You can install the following types of files:

- Palm OS® file types, including PRC and PDB

Various third-party applications are available for your handheld. To learn more about these applications, go to the web site: www.palm.com.

NOTE Palm works with developers of third-party add-on applications to ensure the compatibility of these applications with your new Palm™ handheld. Some third-party applications, however, may not have been upgraded to be compatible with your new Palm handheld. If you suspect that a third-party application is adversely affecting the operation of your handheld, contact the developer of the application.

Installing applications and files on a Windows computer

Palm™ Quick Install makes it easy to install applications and files during the next HotSync operation. You can even install compatible files directly from a Zip file.

You can use any of the following methods to install applications and files with Palm Quick Install:

- Drag and drop files onto the Palm Quick Install icon on the Windows desktop.
- Drag and drop files onto the Palm Quick Install window.
- Use the commands or buttons in the Palm Quick Install window.
- Right-click a file and send it to Palm Quick Install.

The procedures that follow explain how to install applications and files using each of these methods.

To drag and drop applications or files onto the Palm Quick Install icon:

1. Copy or download the application(s) or file(s) you want to install onto your computer.
2. From My Computer or Windows Explorer, select the file(s) or folder that you want to install.
3. Drag and drop the file(s) or folder onto the Palm Quick Install icon on the Windows desktop.



Palm Quick Install displays a confirmation dialog box, and you can choose the username to which the files will be installed.

4. Click OK.

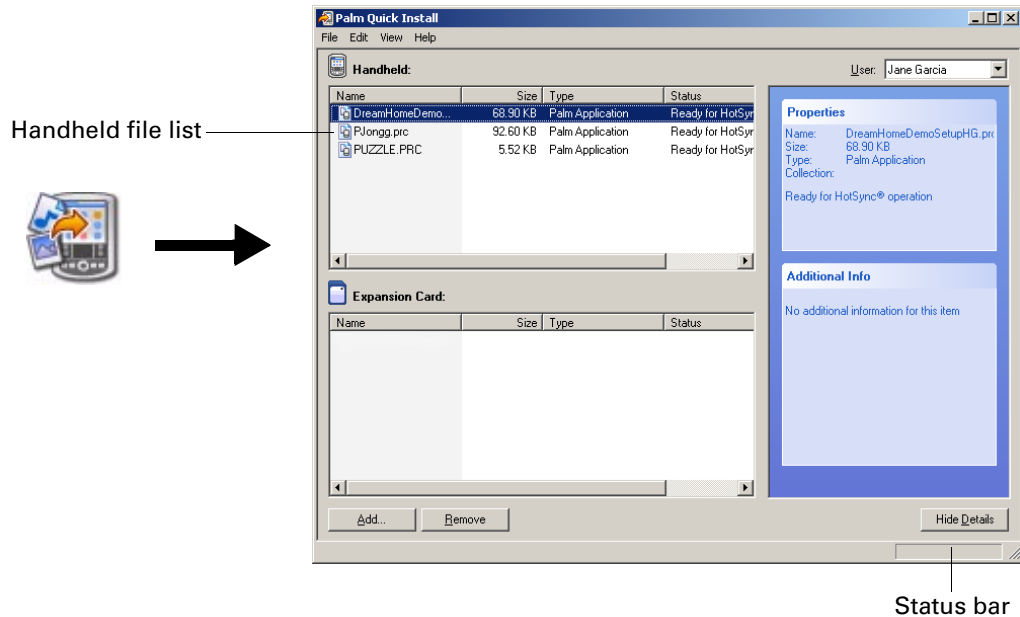
The selected files are placed in the Handheld file list.

5. Perform a HotSync operation to install the files. See [“Conducting cable HotSync operations”](#) in [Chapter 13](#) for details.

NOTE Files that remain in the list after you perform a HotSync operation were not installed. This can happen if your handheld is too full to install the file or if the file type was not recognized during the HotSync operation. If files are unrecognized, try launching the associated application from your handheld and then performing another HotSync operation. If the files still remain in the list, they are not associated with an application on your handheld and cannot be installed.

To drag and drop applications or files onto the Palm Quick Install window:

1. Copy or download the application(s) or file(s) you want to install onto your computer.
2. Double-click the Palm Quick Install icon on the Windows desktop.



3. From My Computer or Windows Explorer, select the file(s) or folder that you want to install.
4. Drag and drop the file(s) or folder onto the handheld file list.

If a No symbol appears when you attempt to drag a file onto a file list, that file is not supported on that destination.

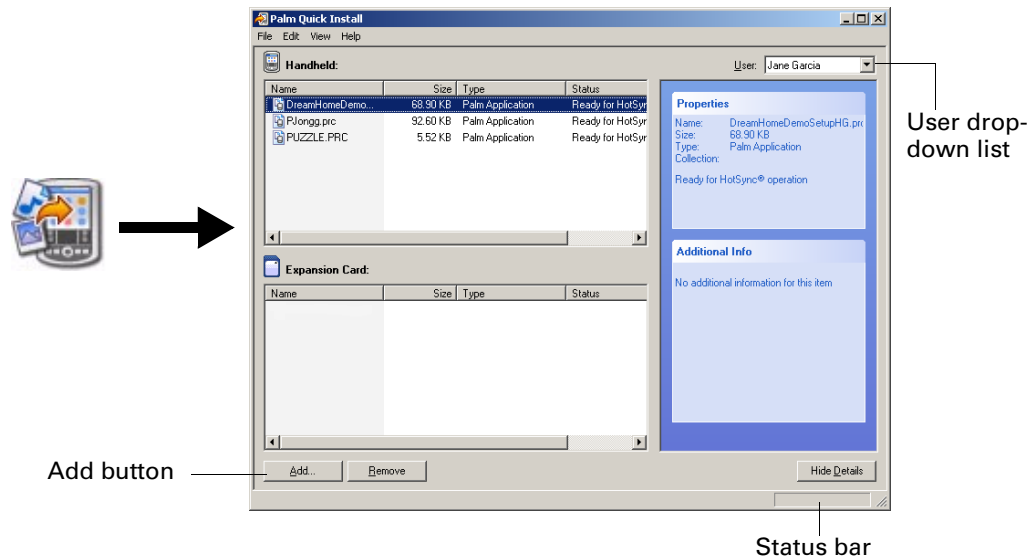
The status bar shows the number of files selected and their total size. However since some file types are compressed during synchronization they may actually require less space than the amount shown in the file size column or status bar.

5. Perform a HotSync operation to install the files. See [“Conducting cable HotSync operations”](#) in [Chapter 13](#) for details.

NOTE Files that remain in the list after you perform a HotSync operation were not installed. This can happen if your handheld is too full to install the file or if the file type was not recognized during the HotSync operation. If files are unrecognized, try launching the associated application from your handheld and then performing another HotSync operation. If the files still remain in the list, they are not associated with an application on your handheld and cannot be installed.

To use the command buttons in the Palm Quick Install window:

1. Copy or download the application(s) or file(s) you want to install onto your computer.
2. Double-click the Palm Quick Install icon on the Windows desktop.



3. In the User drop-down list, select the name that corresponds to your handheld.
4. Click Add.

TIP To install a folder, open the File menu and select Add Folder.

5. Select the application(s) or file(s) that you want to install.

If you do not see the application(s) or file(s) in the default folder, navigate to the folder that contains the application(s) or file(s) that you want to install.

6. Click OK.

The status bar shows the number of files selected and their total size. However since some file types are compressed during synchronization they may actually require less space than the amount shown in the file size column or status bar.

7. Perform a HotSync operation to install the selected application(s).
See [“Conducting cable HotSync operations”](#) in [Chapter 13](#) for details.

NOTE Files that remain in the list after you perform a HotSync operation were not installed. This can happen if your handheld is too full to install the file or if the file type was not recognized during the HotSync operation. If files are unrecognized, try launching the associated application from your handheld and then performing another HotSync operation. If the files still remain in the list, they are not associated with an application on your handheld and cannot be installed.

To use the right-click menu to send the file to Palm Quick Install:

1. Copy or download the application(s) or file(s) you want to install onto your computer.
2. From My Computer or Windows Explorer, right-click the file(s) or folder that you want to install.
3. Select Send To and then select Palm Quick Install.

Palm Quick Install displays a confirmation dialog box that shows that the files will be installed on your handheld.

4. Click OK.

The selected files are placed in the Handheld file list.

5. Perform a HotSync operation to install the files. See [“Conducting cable HotSync operations”](#) in [Chapter 13](#) for details.

Any unrecognized files are not installed.

Palm Quick Install tips

The following tips can help you use Palm Quick Install most effectively:

- When you drag and drop a folder, Palm Quick Install looks at files in the first level of subfolders only; it does not look at folders nested inside the subfolders.
- To install files in a different location, start Palm Quick Install and drag the files to a different file list.
- You can also access the Palm Quick Install window by clicking Quick Install on the Palm Desktop Launch bar.

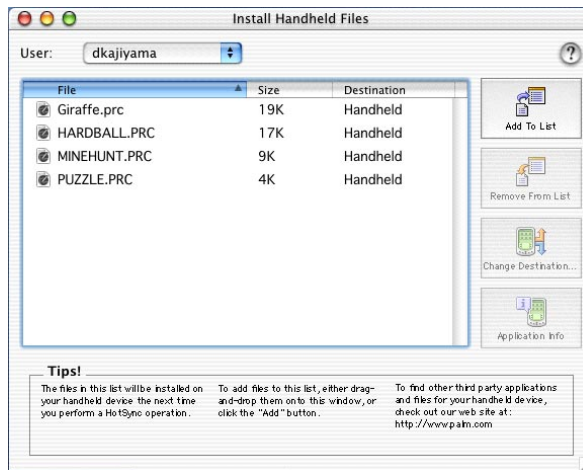
Installing applications and files on a Mac computer

The Install Tool makes it easy to install applications and files on your handheld during a HotSync operation.

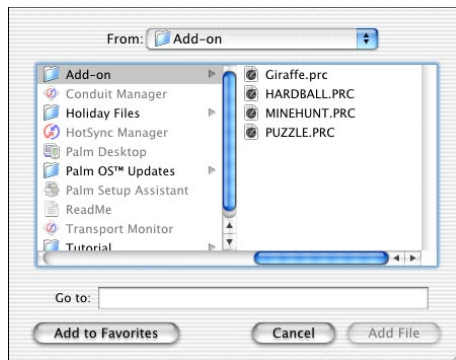
To install add-on software on your handheld using a Mac computer:

1. On your Mac computer, copy or download the application you want to install into the Add-on folder in your Palm folder.
2. Double-click the HotSync Manager icon in the Palm folder.
3. From the HotSync menu, select Install Handheld Files.

- From the User pop-up menu, select the name that corresponds to your handheld.



- Click Add To List.



If the file you want to install is not listed in the dialog box, go to the folder to which you copied the file. Most handheld application files have the extension PRC or PDB.

- Select the application(s) you want to install.
- Click Add File to add the selected application to the Install Handheld Files list.

TIP You can also drag files, or folders of files, to the list in the Install Handheld Files dialog box. The files are copied to the Files To Install folder.

8. Close the Install Handheld Files window.
9. Perform a HotSync operation to install the selected application(s) on your handheld. See [“Conducting cable HotSync operations”](#) in [Chapter 13](#) for details.

NOTE Files that remain in the list after you perform a HotSync operation were not installed. This can happen if the file type was not recognized during the HotSync operation. For your handheld to recognize such a file, you must first launch the associated application at least once.

Removing applications

If you run out of memory or decide that you no longer need an application you installed, you can remove applications from your handheld. You can remove only add-on applications, patches, and extensions that you install; you cannot remove the applications that reside in the ROM portion of your handheld.

To remove an add-on application:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Delete on the App menu.
4. Tap the application that you want to remove.
5. Tap Delete.
6. Tap Yes.
7. Tap Done.

Removing Palm Desktop software

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

This process removes only the application files. The data in your Users folder remains untouched.

IMPORTANT If you remove Palm Desktop software, you also remove the HotSync Manager synchronization software and can no longer synchronize with your computer. If you are using another personal information manager (PIM), such as Microsoft Outlook, you must have Palm Desktop software installed to synchronize your handheld with this application.

NOTE You may need to modify the steps shown here to accommodate the version of the operating system installed on your computer.

To remove Palm Desktop software from a Windows computer:

1. From the Windows Start menu, select Settings and then click Control Panel.
2. Double-click the Add/Remove Programs icon.
3. Click the Change or Remove Programs button.
4. Select Palm Desktop.
5. Click Change/Remove.

This process removes only the application files. The data in your Users folder remains untouched.

6. Click Yes in the Confirm File Deletion box.
7. Click OK.
8. Click Close.

To remove Palm Desktop software from a Mac computer:

1. Insert the Desktop Software CD-ROM into the CD-ROM drive on your computer.
2. Double-click the Desktop Software CD-ROM icon on your desktop.
3. Double-click the Palm Desktop Installer icon.
4. From the Easy Install screen, select Uninstall from the pop-up menu.
5. Select the software you want to remove.
6. Click Uninstall.
7. Select the folder that contains your Palm Desktop software files.
8. Click Remove.
9. Restart your computer.

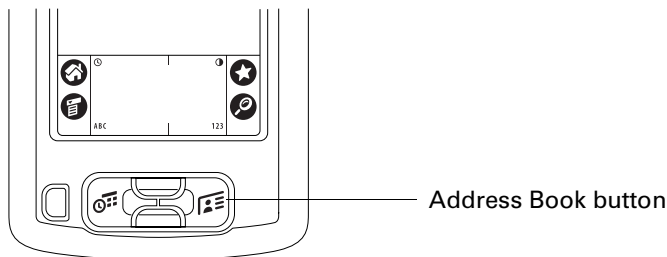
Using Address Book



Address Book enables you to keep names, addresses, phone numbers, and other information about your personal or business contacts. You can also attach notes to Address Book records (called *entries*) to enter additional information about your contacts. Use Address Book to create your own digital business card that you can beam to other devices with an infrared (IR) port and an application that can read the data. See “[Beaming data](#)” in [Chapter 3](#) for more information.

To open Address Book:

- Press the Address Book application button on the front panel of your handheld. Address Book opens to display the list of all your records.



TIP Press the Address Book application button repeatedly to cycle through the categories in which you have records.

Creating an Address Book entry

You can create Address Book entries on your handheld, or you can use Palm™ Desktop software to create them on your computer and then transfer them to your handheld with your next HotSync® operation.

For information on importing data into Address Book on your handheld, see “[Using Note Pad](#)” in [Chapter 3](#) and the Palm Desktop online Help.

To create a new Address Book entry:

1. Press the Address Book application button  on the front of your handheld to display the Address list.
2. Tap New.

3. Enter the last name of the person you want to add to your Address Book.

The handheld automatically capitalizes the first letter of each field (except numeric and e-mail fields). You do not have to use the Graffiti® 2 capital stroke to capitalize the first letter of the name.

4. Enter the other information that you want to include in this entry.
5. Tap the scroll arrows  to move to the next page of information.
6. After you finish entering information, tap Done.



Tap Done

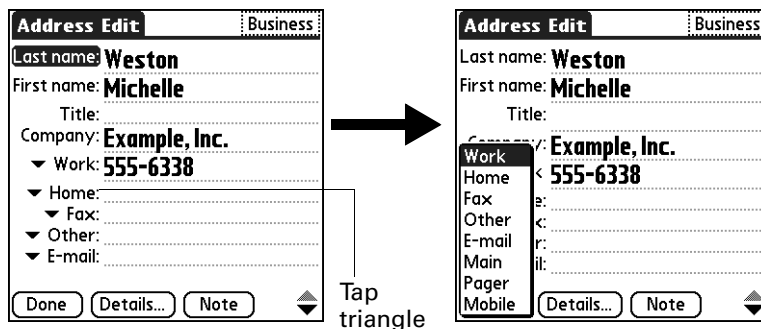
TIP To create an entry that always appears at the top of the Address list, begin the Last name or Company field with a symbol, as in *If Found Call*. This entry can contain contact information in case you lose your handheld.

Selecting types of phone numbers

You can select the types of phone numbers or e-mail addresses that you associate with an Address Book entry. Any changes you make apply only to the current entry.

To select other types of phone numbers in an entry:

1. Tap the entry that you want to change.
2. Tap Edit.
3. Tap the pick list next to the label you want to change.



4. Select a new label.

Changing Address Entry details

The Address Entry Details dialog box provides a variety of options that you can associate with an entry.

To open the Address Entry Details dialog box:

- 1. Tap the entry whose details you want to change.
- 2. Tap Edit.
- 3. Tap Details.
- 4. Select any of the following settings:

Show in List	Select which type of phone or other information appears in the Address list screen.
Category	Assign the entry to a category.
Private	Hide this entry when Security is turned on.

Using Address Book menus

Address Book menus are shown here for your reference, and Address Book features that are not explained elsewhere in this book are described here.

See “Using menus” in Chapter 4 for information about selecting menu commands.

The Record and Options menus differ depending on whether you’re displaying the Address list screen (shows all Address Book records) or the Address view screen (for use within a specific Address Book record).

Record menus

Record	Edit	Options
Duplicate Address	✓T	
Beam Category		
Beam Business Card		

Address list

Record	Options
Delete Address	✓D
Duplicate Address	✓T
Beam Address	✓B
Attach Note	✓A
Delete Note	✓O
Select Business Card	
Beam Business Card	

Address view

Duplicate Address	Makes a copy of the current record and displays the copy in Address Edit so you can make changes to the copied record. The copy has the same category and attached notes as the original record.
-------------------	--

Options menus



Address list



Address Edit view

Preferences

Opens a dialog box where you can choose Address Book display options.

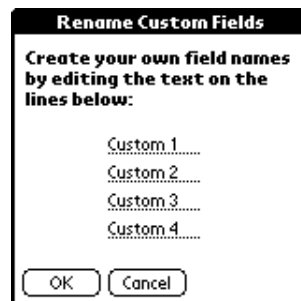


Remember Last Category. Determines how Address Book appears when you return to it from another application. If you select this check box, Address Book shows the last category you selected. If you deselect it, Address Book displays the All category.

Rename Custom Fields

These custom fields appear at the end of the Address Edit screen. Rename them to identify the kind of information you enter in them. The names you give the custom fields appear in all entries.

You can use these custom fields to track additional information in your Address records, such as names of spouses, children, or any other details.



Using Calculator



Calculator enables you to perform basic calculations. You can store and retrieve values, and display the last series of calculations.

To open Calculator:

1. Tap the Home icon .
2. Tap the Calculator icon .

Performing calculations

The Calculator includes several buttons to help you perform calculations.



Clears the entire calculation so that you can begin a fresh calculation.



Clears the last number you entered. If you make a mistake while entering a number in the middle of a calculation, you can use this button to reenter the number without starting the calculation over.



Toggles the current number between a negative and positive value. If you want to enter a negative number, enter the number first *and then* press the +/- button.



Places the current number into memory. Each new number you enter with the M+ button is *added to the total* already stored in memory. The number that you add can be either a calculated value or any number you enter by pressing the number buttons. Pressing this button has no effect on the current calculation (or series of calculations); it merely places the value into memory until it is recalled.



Recalls the stored value from memory and inserts it into the current calculation.



Clears any value that is stored in the Calculator memory.



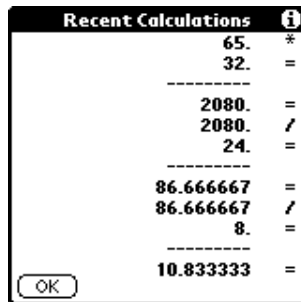
Calculates the square root of a number. Enter the number, and then tap the square root button.

Viewing Recent Calculations

The Recent Calculations command enables you to review the last series of calculations and is particularly useful for confirming a series of “chain” calculations.

To display recent calculations:

1. Tap the Menu icon .
2. Select Options, and then select Recent Calculations.



3. After you finish reviewing the calculations, tap OK.

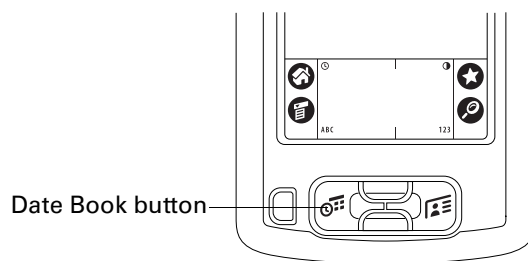
Using Date Book



Date Book enables you to quickly and easily schedule appointments or any kind of activity associated with a time and date. You can attach notes to Date Book records (called *events*) and set alarms to remind you when they happen. You can also look at your schedule through four different views.

To open Date Book:

- Press the Date Book application button on the front panel of your handheld. Date Book opens to today's schedule.



TIP Press the Date Book application button repeatedly to cycle through the Day, Week, Month, and Agenda views.

When you open Date Book, the screen shows the current date and a list of times for a normal business day.

Scheduling an event

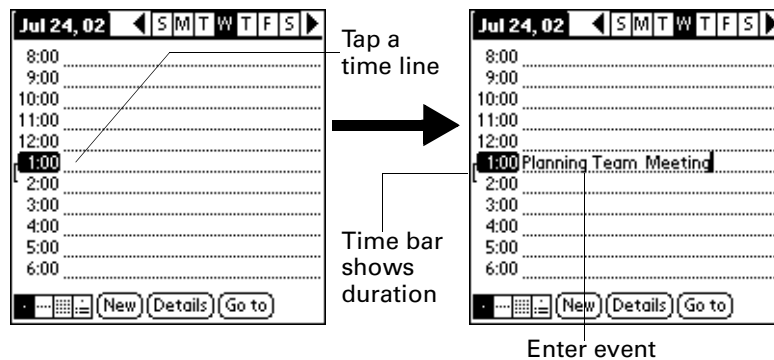
A Date Book event can be any kind of activity that you associate with a day. When you schedule an event, its description appears on the time line, and its duration is automatically set to one hour. You can easily change the start time and duration for any event.

You can also schedule events in your Date Book that occur on a particular date but have no specific start or end times, such as birthdays, holidays, and anniversaries. These are referred to as *untimed events*. Untimed events appear at the top of the list of times, marked with a diamond.

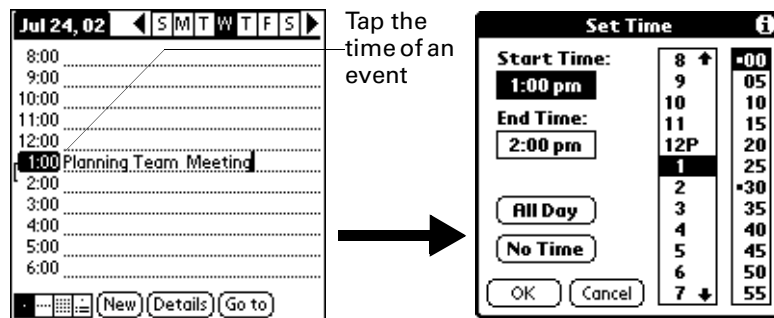
You can also schedule *repeating events*, such as a weekly meeting, and continuous events, such as a three-day conference or a vacation.

To schedule an event for the current day:

1. Tap the time line that corresponds to the beginning of the event.



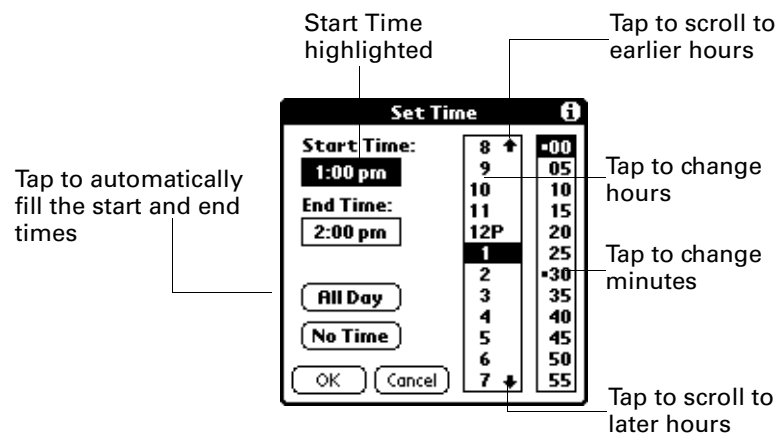
2. Enter a description of the event. You can enter up to 255 characters.
3. If the event is one hour long, skip to step 5. If the event is longer or shorter than an hour, tap the time of the event to open the Set Time dialog box.



TIP You can also use the input area to open the Set Time dialog box. Make sure that no event is selected, and then on the number side of the input area, write a number for the start time of the event.

4. Do one of the following:

- Tap the time columns on the right side of the Set Time dialog box to set the start time, and then tap the End Time box and tap the time columns to set the end time.
- Tap All Day to automatically insert the start and end time of the event as defined in your Date Book preferences.



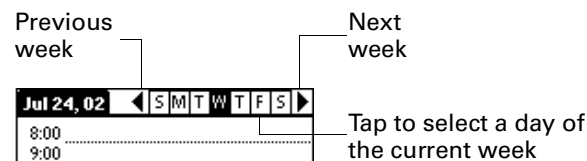
5. Tap OK.

TIP To attach a note to an entry and work with attached notes, see [“Attaching notes”](#) in [Chapter 4](#).

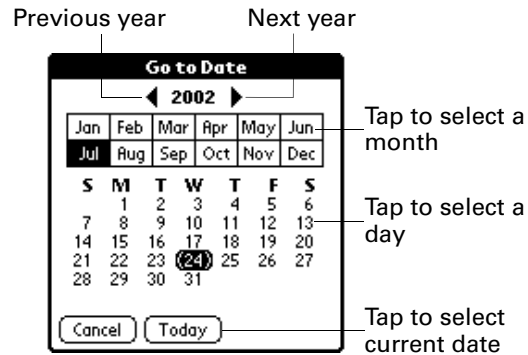
A vertical line appears next to the time, indicating the duration of the event.

To schedule an event for another day:

1. Select the date you want for the event by doing one of the following:
 - Tap the day of the week that you want in the date bar at the top of the screen. If necessary, tap the Previous week or Next week scroll arrows to move to another week.



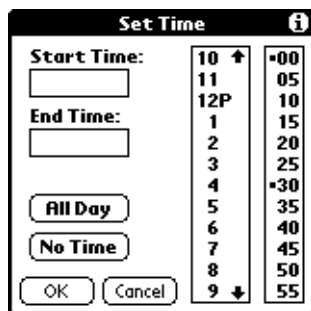
- Use the scroll buttons to scroll to the next or previous day.
- Tap Go To at the bottom of the screen to open the Go to Date dialog box. Select a date by tapping a year, month, and day in the calendar.



2. After you locate the date, follow the steps for scheduling an event for the current day.

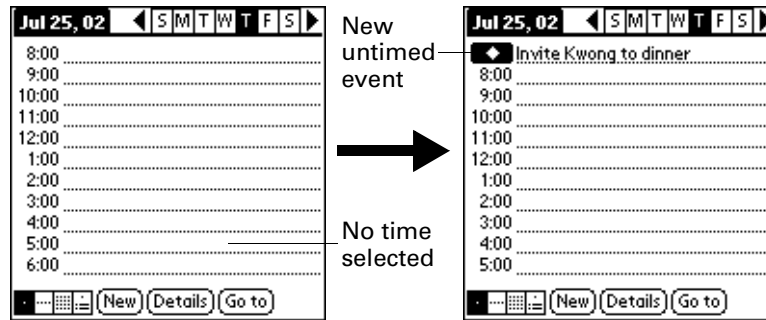
To schedule an untimed event:

1. Select the date that you want for the event.
2. Tap New.
3. Tap No Time.



TIP You can also create a new untimed event by making sure no event is selected and then writing letters in the input area.

4. Enter a description of the event.



After you create an event, you can select an event to view and change its contents.

To select an existing event:

- Go to the day on which the event is scheduled, and then tap the event.

To reschedule an event:

1. Select the event you want to reschedule.
2. Tap Details.
3. To change the time, tap the Time box and tap a new time.
4. To change the date, tap the Date box and tap a new date.
5. Tap OK.

Setting an alarm for an event

When you set an alarm, the Alarm icon  appears at the far right of the event. When the alarm is triggered, a reminder message also appears onscreen.

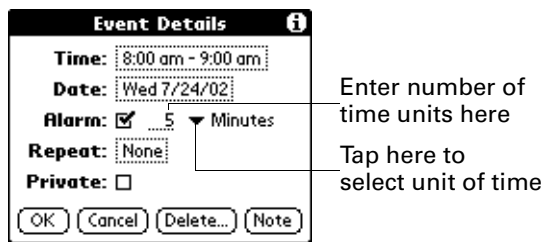
To set an alarm for an event:

1. Select the event to which you want to assign an alarm.
2. Tap Details.
3. Tap the Alarm check box to select it.

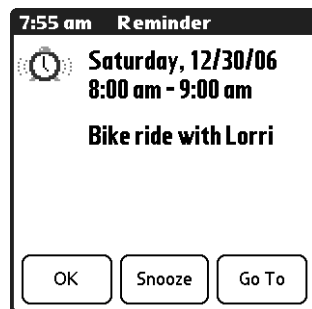
The default setting, 5 Minutes, appears. This means that the alarm will sound 5 minutes before the scheduled time.

4. (Optional) Tap the pick list to select Minutes, Hours, or Days.

5. (Optional) Select the 5 and enter any number from 0 to 99 (inclusive) as the number of time units.



6. Tap OK.
7. When the reminder message appears onscreen, 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. An attention indicator blinks in the upper-left corner of the screen to remind you of the pending alarm, and the reminder message appears again five minutes later.
 - Tap Go To to open Date Book. Date Book will open and display the event associated with the alarm.



Alarm for untimed events: You can set a silent alarm for an untimed event. In this case the alarm is triggered at the specified period (if any) of minutes, hours, or days before midnight (beginning) of the day of the untimed event. When the alarm is triggered, the reminder list displays the alarm message until you clear it. See [“Receiving alerts”](#) in [Chapter 4](#) for details.

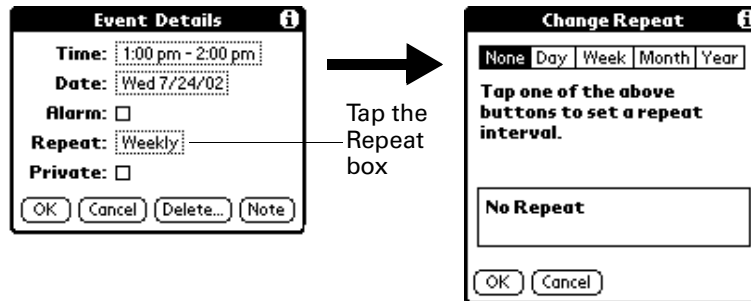
For example, you set an alarm for an untimed event that occurs on February 4. If the alarm is set for 5 minutes, the reminder message appears at 11:55 PM on February 3. The reminder remains in the reminder list until you turn on your handheld and dismiss it.

Scheduling repeating or continuous events

The Repeat function enables you to schedule events that recur at regular intervals, such as a birthday or anniversary, or that extend over a period of consecutive days, such as a vacation or conference.

To schedule a repeating or continuous event:

1. Select the event.
2. Tap Details.
3. Tap the Repeat box to open the Change Repeat dialog box.



4. Tap Day, Week, Month, or Year to set how often the event repeats.
For a continuous event, tap Day.
5. On the Every line, enter a number that corresponds to how often you want the event to repeat.
For example, if you select Month and enter the number 2, the event repeats every other month.
6. To specify an end date for the repeating or continuous event, tap the End on pick list and tap Choose Date. Use the date picker to select an end date.
7. Tap OK.

After you schedule a repeating or continuous event, the Repeat icon  appears at the far right of the event.

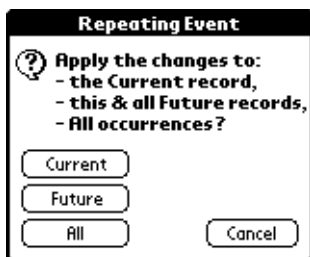
Changing repeating or continuous events

When you make changes to a repeating or continuous event, such as deleting or adding notes or changing the time of an event, you can decide which of the events you want to change—all events in the series, just the current event, or the current and future events.

To delete repeating events:

1. Select the record you want to delete.
2. Tap the Menu icon .

3. Select Delete Event from the Record menu.



4. Do one of the following: Tap Current to delete only the current event item; Future to delete the current and all future event items; All to delete all occurrences of the repeating event.
5. Tap OK.

Considerations for repeating or continuous events

Keep the following points in mind:

- If you change the start date of a repeating event, your handheld calculates the number of days you moved the event. Your handheld then automatically changes the end date to maintain the duration of the repeating event.
- If you change the repeat interval of a repeating event (such as from daily to weekly), previous occurrences of that event are not changed, and your handheld creates a new repeating event.
- If you change the date of an occurrence of a repeating event (such as from January 14 to January 15) and apply the change to all occurrences, the new date becomes the start date of the repeating event. Your handheld adjusts the end date to maintain the duration of the event. If you apply the change to current and future occurrences, past occurrences are not changed.
- If you change other settings of a repeating event (such as time, alarm, private) and apply the change to all occurrences, your handheld creates a new event. The start date of this new event is the day on which the setting is changed.
- If you apply a change to a single occurrence of a repeating event (such as time), that occurrence no longer shows the Repeat icon .

Changing the Date Book view

In addition to displaying the time list for a specific day, you can also display a whole week, a month, or an agenda.

To cycle through Day, Week, Month, and Agenda views:

Do one of the following:

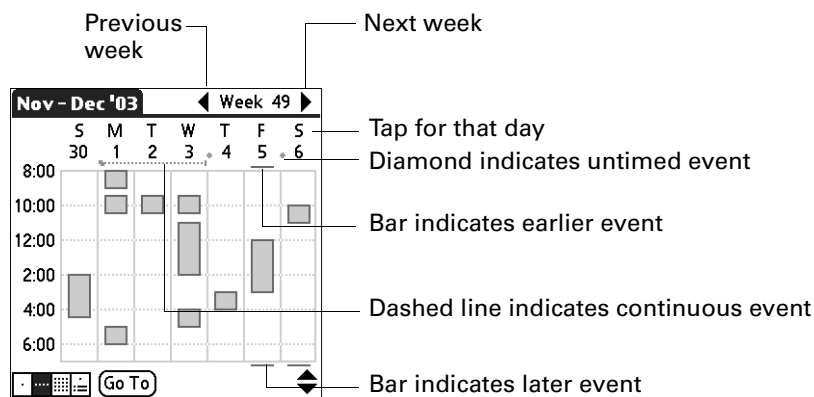
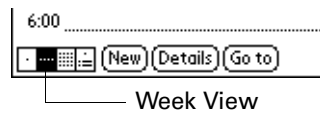
- Press the Date Book application button repeatedly to display the next view.
- Tap the appropriate view icon in the lower-left corner of Date Book.

Working in Week View

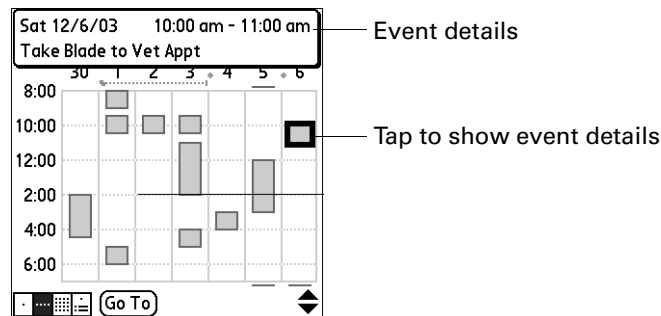
Week View shows the calendar of your events for an entire week. You can use this view to quickly review your appointments and available time slots. In addition, the graphical display helps you spot overlaps and conflicts in your schedule.

To display the Week View:

1. Tap the Week View icon.



2. Tap an event to show a description of the event.



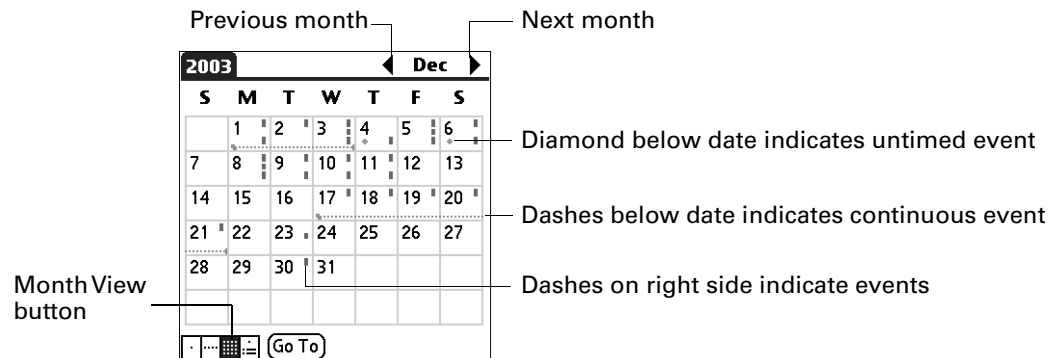
Keep the following points in mind:

- To reschedule an event, tap and drag the event to a different time or day.
- Tap a blank time on any day to move to that day and select that time for a new event.
- Tap any day or date that appears at the top of the Week View to move directly to that day without selecting an event.

- Use the scroll buttons to scroll to the next or previous week.
- The Week View shows the time span defined by the Start Time and End Time in the Date Book Preferences settings. If you have an event before or after this time span, a bar appears at the top or bottom of that day's column. Use the onscreen scroll arrows ⇅ to scroll to the event.

Working in Month View

Tap a day in the Month View to display that day in the Day View.



You can control the types of events that appear in the Month View. See [“Display Options”](#) later in this chapter.

You can also tap the scroll arrows in the upper-right corner to move forward or backward a month.

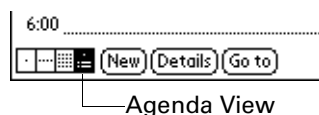
Working in Agenda View

The Agenda View shows you your events and To Do items on one screen. Tap an event in the Agenda View to open Day View and see more detailed information about the event. Tap a To Do item to open To Do List. To return to the Agenda view, press the Date Book button.

NOTE Which To Do items appear and how you can change them depend on the settings in your To Do preferences. See [“Setting To Do Preferences”](#) in [Chapter 11](#) for more information.

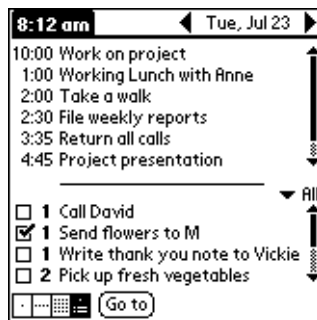
To display the Agenda View:

1. Tap the Agenda View icon.

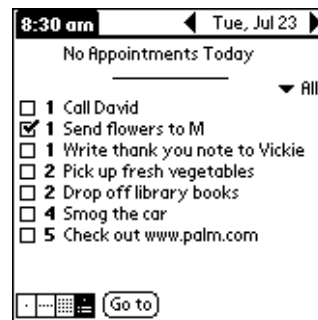


2. Tap the navigation controls to move forward or backward a day at a time, or to display more events and To Do items.

TIP You can also use the scroll buttons to scroll to the next or previous day.



Day with appointments



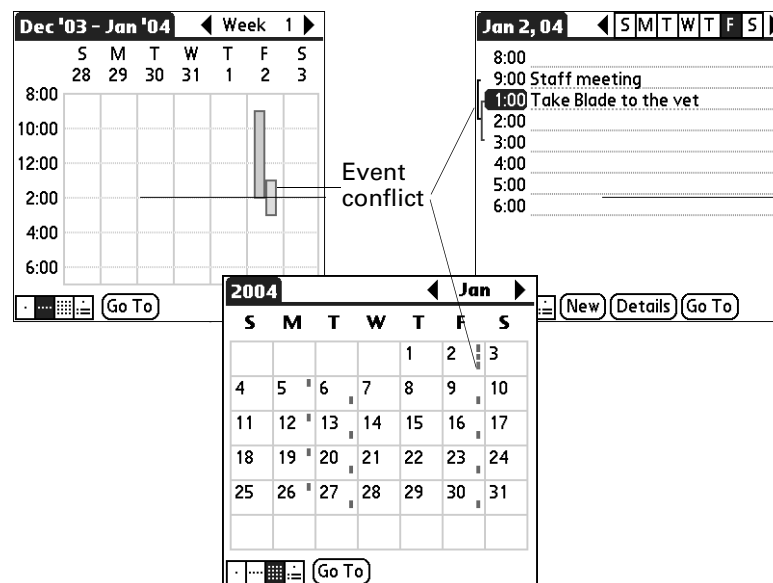
Same day without appointments

NOTE You can also change the category of To Do items shown. Tap the pick list to select another category. See [Chapter 11](#) for more information on working with To Do items.

Spotting event conflicts

With the ability to define specific start and end times for any event, it's possible to schedule events that overlap (an event that starts before a previous event finishes).

An event conflict (time overlap) appears in the Week View as overlapping bars. The Day View displays overlapping brackets to the left of the conflicting times.

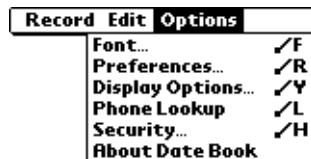


Using Date Book menus

Date Book features that are not explained elsewhere in this book are described here.

See “Using menus” in [Chapter 4](#) for information about choosing menu commands.

Options menu



Display Options

Change the appearance of Date Book’s Day View and control which type of events appear in Month View.



- | | |
|----------------------------|--|
| Show Time Bars | Activates the time bars that appear in the Day View. The time bars show the duration of an event and illustrate event conflicts. |
| Compress Day View | Controls how times appear in the Day View. When Compress Day View is off, all time slots appear. When it is on, start and end times appear for each event, but blank time slots toward the bottom of the screen disappear to minimize scrolling. |
| Month View settings | Applies to the Month View of Date Book. You can deselect any or all of these check boxes to hide Timed, Untimed, or Daily Repeating events in the Month View <i>only</i> . |

Preferences

Customize Date Book's default time display and alarm settings.



- Start/End Time** Defines the start and end times for Date Book screens. If the time slots you select do not fit on one screen, you can tap the scroll arrows  to scroll up and down.
- Alarm Preset** Automatically sets an alarm for each new event. The silent alarm for untimed events is defined by minutes, days, or hours before midnight at the beginning of the date of the event.
- Alarm Sound** Sets the tone of the alarm.
- Remind Me** Defines how many times the alarm will occur after the initial occurrence. The choices are Once, Twice, 3 Times, 5 Times, and 10 Times.
- Play Every** Defines how often the alarm sounds. The choices are Minute, 5 minutes, 10 minutes, and 30 minutes.

Using Expense



Expense enables you to keep track of your expenses and then transfer the information to a spreadsheet on your computer. You can log miles traveled and keep track of vendors. You can also export your expense information to popular computer applications, such as Microsoft Excel or Microsoft Word, using Palm™ Desktop software and HotSync® technology on a Windows computer.

To open Expense:

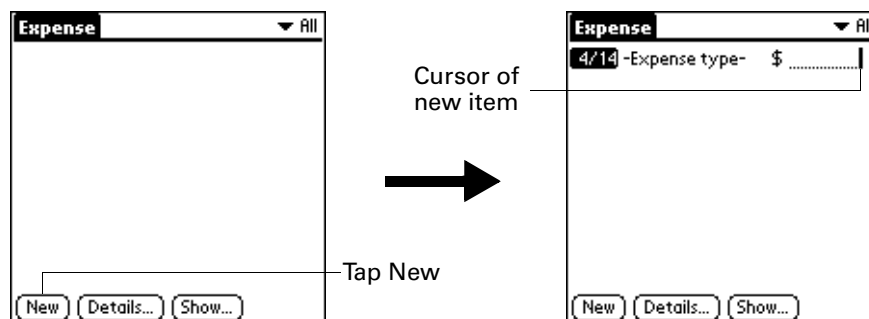
1. Tap the Home icon .
2. Select the Expense icon .

Adding expense items

A record in Expense is called an *item*. You can sort your Expense items into categories or add other information that you want to associate with the item.

To add an expense item:

1. Tap New.

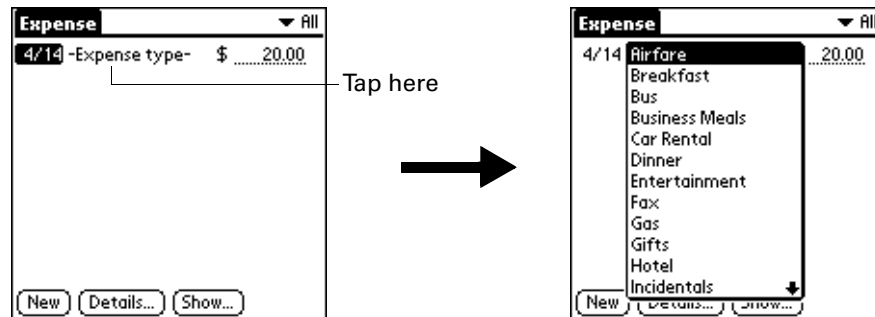


TIP You can also create a new Expense item by writing on the number side of the input area while in the Expense list screen. The first number you write begins the amount of your new Expense item.

2. Enter the amount of the expense.

3. Tap the Expense type pick list and select a type from the list.

As soon as you select an expense type, your handheld saves your entry. If you do not select an expense type, it does not save the entry.



TIP Another quick way to create a new Expense item is to make sure that no Expense item is selected in the Expense list, write the first letter(s) of the expense type, and then write the numerical amount of the Expense item. This technique takes advantage of the automatic fill feature. See [“Options menu”](#) later in this chapter for details.

Changing the date of an Expense item

Initially, Expense items appear with the date on which you enter them. You can change the date associated with any Expense item.

To change the date of an Expense item:

1. Tap the Expense item you want to change.
2. Tap the date of the selected item.
3. Tap the new date.

Entering receipt details

Expense provides a variety of options that you can associate with an item. These options appear in the Receipt Details dialog box.

To open the Receipt Details dialog box:

1. Tap the Expense item to which you want to assign details.
2. Tap Details.

3. Select any of the following options:

- | | |
|------------------------|---|
| Category | Opens a pick list of system and user-defined categories. See “Categorizing records” in Chapter 4 for more information. |
| Type | Opens a pick list of expense types. |
| Payment | Enables you to choose the payment method for the Expense item. If the item is prepaid (such as airline tickets supplied by your company), you can choose Prepaid to place your expense in the appropriate company-paid cell of your printed expense report. |
| Currency | Enables you to choose the type of currency used to pay the Expense item. The default currency unit is defined in the Preferences dialog box. You can also display up to four other common types of currency. |
| Vendor and City | Enables you to record the name of the vendor (usually a company) associated with the expense and the city where the expense was incurred. For example, a business lunch might be at Rosie’s Cafe in San Francisco. |
| Attendees | See “Looking up names to add to Expense records” in Chapter 4 for more information. |

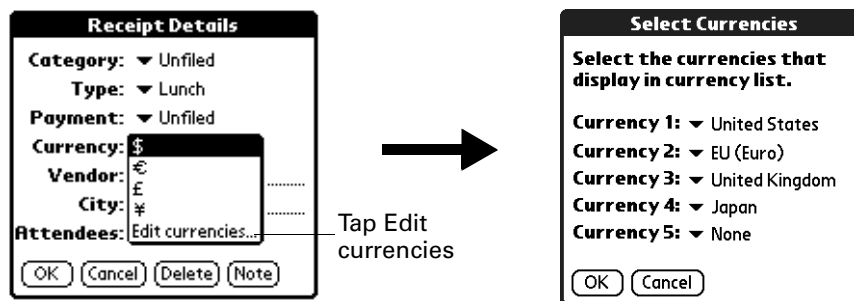
4. Tap OK.

Customizing the Currency pick list

You can select the currencies and symbols that appear in the Currency pick list.

To customize the Currency pick list:

1. Tap the Currency pick list in the Receipt Details dialog box, and then select Edit currencies.



2. Tap each Currency pick list and select the country whose currency you want to display on that line.
3. Tap OK to close the Select Currencies dialog box.
4. Tap OK.

Changing the default currency

You can select which currency appears by default when you're entering Expense items. You can override this setting when entering individual expense items.

To change your default currency:

1. Open Expense.
2. Tap the Menu icon .
3. Select Options, and then select Preferences.
4. Tap the Default Currency pick list.
5. Tap the currency symbol you want to appear in Expense.
6. Tap OK.

Defining a custom currency symbol

If the currency you want to use is not in the list of countries, you can create your own custom country and currency symbol.

To define a custom currency symbol:

1. Tap the Menu icon .
2. Select Options, and then select Custom Currencies.
3. Tap one of the four Country boxes.
4. Enter the name of the country and the symbol that you want to appear in Expense.
5. Tap OK to close the Currency Properties dialog box.
6. Tap OK.

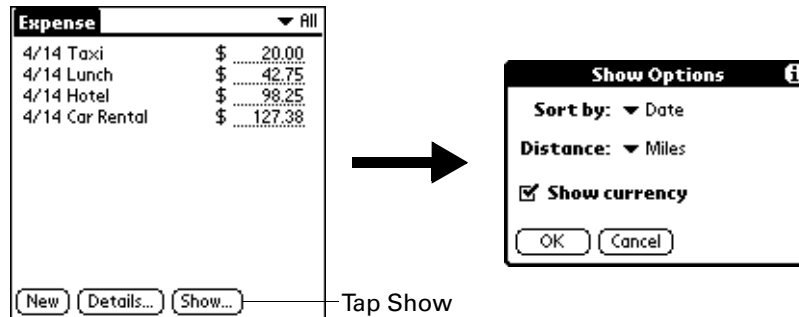
NOTE If you want to use your custom currency symbol as the default for all Expense items, select the symbol in the Preferences dialog box. If you want to use your custom currency symbol only for a particular Expense item, select the symbol in the Receipt Details dialog box associated with that item.

Setting Show Options

Show Options defines the sort order and other settings that relate to your Expense items.

To open the Show Options dialog box:

1. In the Expense list, tap Show.
2. Select any of the options.



- Sort by** Enables you to sort expense items by date or type.
- Distance** Enables you to display Mileage entries in miles or kilometers.
- Show currency** Shows or hides the currency symbol in the Expense list.

3. Tap OK.

Working with Expense data on your computer

After you enter your expenses into the Expense application on your handheld and perform a HotSync operation, Palm Desktop software enables you to do any of the following on your Windows computer. See the Palm Desktop software online Help for details. This feature is not available on Mac computers.

- Add, modify, and delete your Expense data.
- Organize your Expense data by category, amount, date, type, or notes.
- View Expense data in various formats: List, Large Icons, or Small Icons.
- Record individual expenses in various currencies and display the total in one selected currency type.
- Print Expense reports.
- Transfer Expense data to other applications, such as Microsoft Excel, using the Send command or Export command, and import data in popular file formats.

Using Expense menus

An Expense menu is shown here for your reference, and Expense features that are not explained elsewhere in this book are described here.

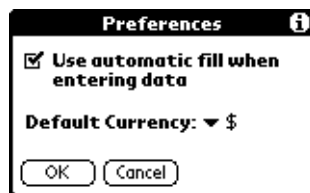
See “Using menus” in [Chapter 4](#) for information about selecting menu commands.

Options menu



Preferences

Opens the Preferences dialog box, where you can select automatic fill and default currency options.



Use automatic fill. Enables you to select an expense type by writing the first letter of an expense type in the input area. For example, if you write the letter *T*, it enters the “Taxi” expense type. Writing *T* and then *E* enters “Telephone,” which is the first expense type beginning with the letters *TE*.

Using Memo Pad



Memo Pad provides you with a place to take notes that are not associated with records in Date Book, Address Book, or To Do List. The number of memos you can store depends only on the memory available on your handheld. You can also send memos to popular computer applications like Microsoft Word when you synchronize using Palm™ Desktop software and HotSync® technology.

To open Memo Pad:

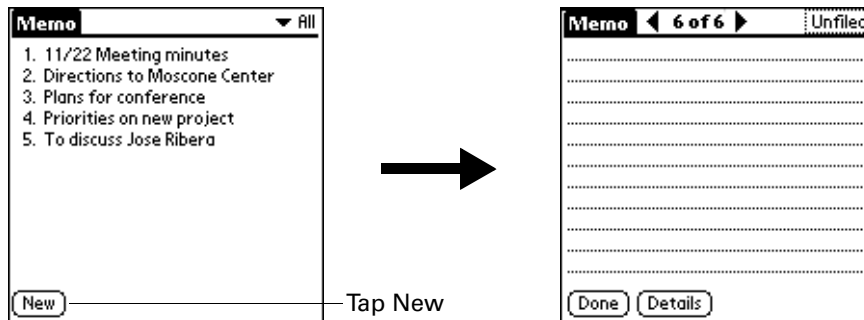
1. Tap the Home icon .
2. Select the Memo Pad icon .

Creating memos

You can assign memos to categories and mark them private, as described in [Chapter 4](#). This section covers how to create a memo.

To create a new memo:

1. Open Memo Pad.
2. Tap New.



TIP In the Memo list screen, you can also begin writing in the input area to create a new memo. The first letter is automatically capitalized and begins your new memo.

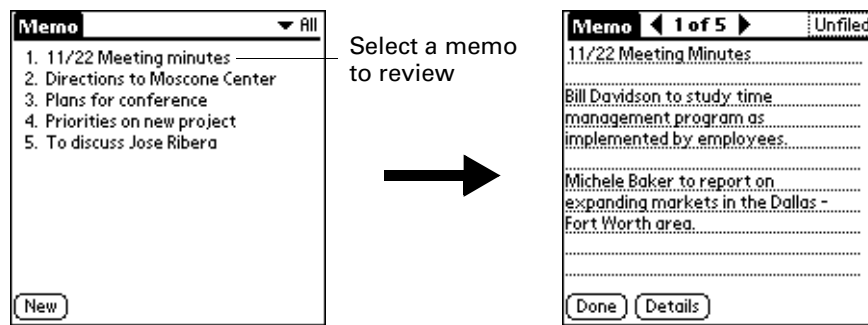
3. Enter the text you want to appear in the memo. Use the carriage return stroke to move down to new lines in the memo.
4. Tap Done.

Reviewing memos

The first line of a memo appears in the Memo list. This makes it easy to locate and review your memos.

To review a memo:

1. From the Memo list, select the text of the memo.



2. Review or edit the text in the memo.
3. Tap Done.

Using Memo Pad menus

Memo Pad menus are shown here for your reference, and Memo Pad features that are not explained elsewhere in this book are described here.

See “Using menus” in [Chapter 4](#) for information about selecting menu commands.

The menus differ depending on whether you’re displaying the Memo list or an individual memo.

Options menus



Memo list



Memo screen

Preferences

Displays the Memo Preferences dialog box, where you define the sort order for memos.

Using Note Pad



Note Pad provides a place for you 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. You can exchange notes with other devices that have Note Pad 2.x installed and that use infrared communication.

To open Note Pad:

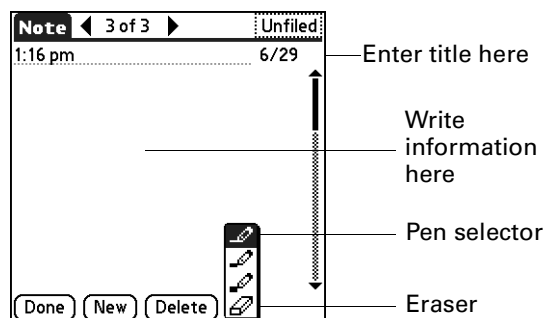
1. Tap the Home icon .
2. Select the Note Pad icon .

Creating a note

You can assign notes to categories and mark them private, as described in [Chapter 4](#). This section covers how to create a note.

To create a new note:

1. Tap New.



2. Write the information directly on the handheld screen.
Tap the pen selector to select a different pen width, or select the eraser to remove unwanted strokes.
3. (Optional) Select the time at the top of the screen, and then enter a title using Graffiti® 2 writing.
4. Tap Done.

To clear the screen:

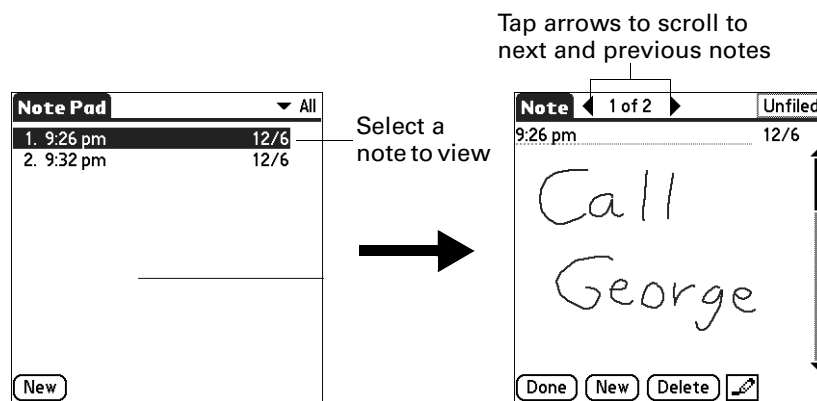
1. Tap the Menu icon .
2. Select Edit, and then select Clear Note.

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, select the note title.



2. Review or edit the contents of the note.
3. 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 to which you want to assign an alarm.
2. Tap the Menu icon .
3. Select Options, and then select Alarm.
4. Tap the Date box.
5. Tap the year, month, and date you want the alarm to sound.
After you tap the date, the Set Alarm dialog box reappears.
6. Tap the Time box.

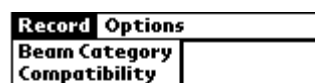
7. Tap the hour and minute columns to select the time you want the alarm to occur.
8. Tap OK.
9. When the alarm goes off and the reminder message appears onscreen, do one of the following:
 - Tap OK to permanently dismiss the reminder and return to the current screen.
 - Tap Snooze to dismiss the reminder and return to the current screen. An attention indicator blinks in the upper-left corner of the screen to remind you of the pending alarm, and the reminder message appears again in five minutes. When the reminder message reappears, the current time appears in the Reminder bar and the note title appears on the screen.
 - If you did not title the note, the time the note was created appears on the screen.
 - Tap Go To to open Note Pad. Note Pad will open and display the note associated with the alarm.

Using Note Pad menus

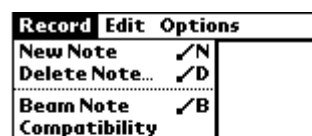
Note Pad menus are shown here for your reference, and Note Pad features that are not explained elsewhere in this book are described here.

The Record menu is the same when you're viewing the Note Pad list and an individual note. The Options menu differs depending on whether you're viewing the Note Pad list or an individual note.

Record menu



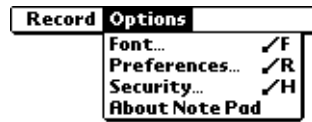
Note Pad list



Note screen

Compatibility Displays the Compatibility dialog box, where you can choose to beam notes to a previous version of Note Pad.

Options menus



Note Pad list



Note screen

- | | |
|--------------------|--|
| Preferences | Displays the Note Pad Preferences dialog box, where you define the pen and paper color, the sort order for notes, and the alarm sound. |
| Details | Displays the Note Details dialog box, where you assign a category and privacy option for a note. |

Using To Do List



To Do List is a convenient place to create reminders and prioritize the things you need to do. You can also attach a note to an individual To Do List item for a description or clarification of the task.

To open To Do List:

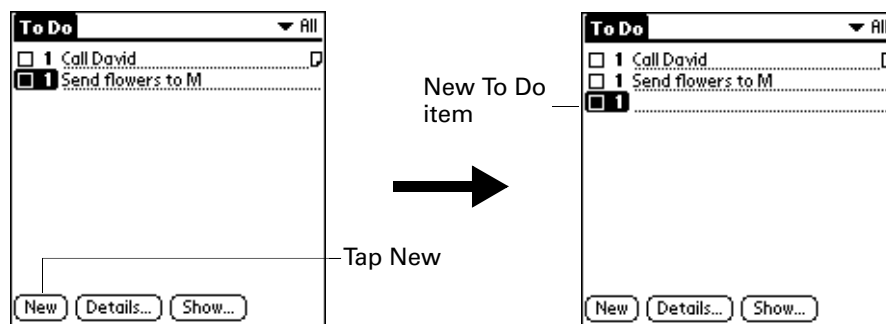
1. Tap the Home icon .
2. Select the To Do List icon .

Creating list items

A To Do List record (called an *item*) is a reminder of a task that you must complete.

To create a To Do List item:

1. Tap New.



2. Enter the text of the To Do List item. The text can be longer than one line.
3. Tap anywhere onscreen to deselect the To Do List item.

TIP If no To Do List item is currently selected, writing in the input area automatically creates a new item.

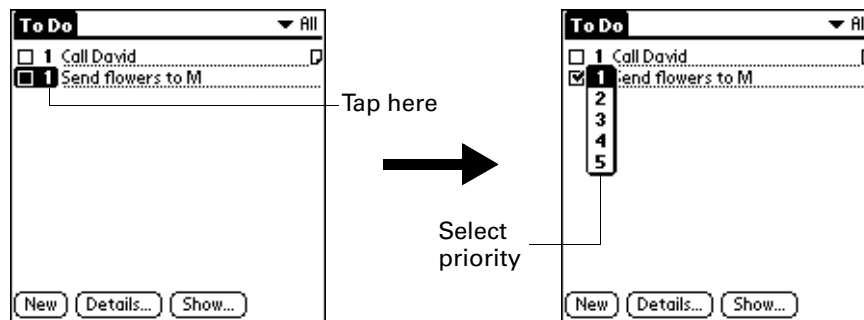
Setting priority

You can use the priority setting for items to arrange the tasks in your To Do List according to their importance or urgency. The default setting for the To Do List is to arrange items by priority and due date, with priority 1 items at the top. If you have a number of items in your list, changing an item's priority setting may move its position in the list.

When you create a new To Do List item, its priority is automatically set to level 1, the highest (most important) level. If you select another item first, however, the item you create appears beneath the selected item and is given the same priority as the selected item.

To set the priority of a To Do List item:

1. Tap the Priority number on the left side of the To Do List item.



2. Select the Priority number that you want to set (1 is most important).

Checking off a To Do List item

You can check off a To Do List item to indicate that you've completed it. You can set the To Do List to record the date that you complete the To Do item, and you can show or hide completed items. See [“Setting To Do Preferences”](#) later in this chapter.

To check off a To Do List item:

- Tap the check box on the left side of the item.

Changing To Do List item details

The To Do Item Details dialog box enables you to change settings for individual items.

To display the To Do Item Details dialog box:

1. Tap the text of the item whose details you want to change.
2. Tap Details.



Setting a due date

You can associate a due date with any To Do List item. You can also sort the items based on their due dates.

To set a due date for a To Do List item:

1. In the Details dialog box, tap No Date to open the Due Date pick list.
2. Tap the date that you want to assign the item:

Today	Assigns the current date.
Tomorrow	Assigns tomorrow's date.
One week later	Assigns the date exactly one week from the current date.
No Date	Removes the due date from the item.
Choose date	Opens the date selector, where you can choose any date that you want for the item.

3. Tap OK.

TIP If you turn on the Show Due Dates option in the To Do Preferences dialog box, you can tap directly on the due date in the To Do List to open the pick list shown in step 2.

Setting To Do Preferences

The To Do Preferences dialog box enables you to control the appearance of To Do List, and To Do items in Date Book Agenda view.

To change the Preferences settings:

1. In To Do List, tap Show.
2. Select any of the following settings:

Show Completed Items Displays your completed items in the To Do List. If you turn off this setting, your To Do items disappear from the list when you complete (check) them.

Items that no longer appear in the list because you turn off this setting have not been deleted. They are still in the memory of your handheld. You can purge completed items to remove them from memory.

Show Only Due Items Shows only the items that are currently due, past due, or have no due date specified. When this setting is active, items that are not yet due do not appear in the list until their due date.

Record Completion Date Replaces the due date with the actual date when you complete (check) the item. If you do not assign a due date to an item, the completion date still records when you complete the item.

Show Due Dates Displays the due dates associated with items in the To Do List and displays an exclamation mark next to items that remain incomplete after the due date passes.

Show Priorities Shows the priority setting for each item.

Show Categories Shows the category for each item.

3. Tap OK.

Using World Clock



World Clock enables you to view the current time and date in multiple locations and to set an alarm.

To open World Clock:

1. Tap the Home icon
2. Select the World Clock icon

TIP You can also open World Clock by tapping the Clock icon in the upper-left corner of the input area.

Viewing the time

There are several ways for you to easily check the current time and date.

To view the time:

Do one of the following:

- When your handheld is on, tap the Clock icon in the upper-left corner of the input area.
Your handheld displays the time for two seconds and then returns to the previous application.
- Tap the Home icon , and then select the World Clock icon .

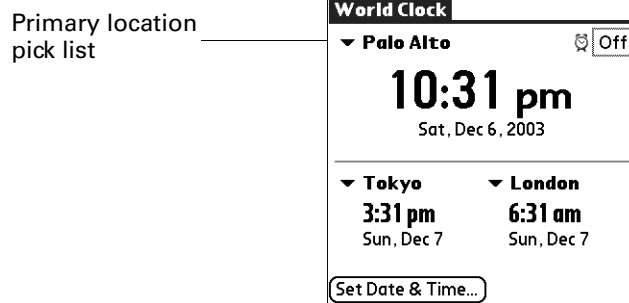
Setting the primary location

You can use World Clock to select the location, date, and time for the primary location. Keep in mind that the primary location settings are also your system date and time and that these settings are used by all the applications on your handheld. The primary Location settings also appear in the Date & Time Preferences screen. Similarly, if you change the settings in the Date & Time Preferences screen, those settings become your system date and time and also appear under the primary location in World Clock. The primary Location settings also serve as a point of reference for the secondary locations.

The following steps show you how to set the location, date, and time from within World Clock. See [“Date & Time Preferences”](#) in [Chapter 14](#) for details on changing these settings from the Preference screen.

To set the primary location:

1. Tap the primary location pick list.



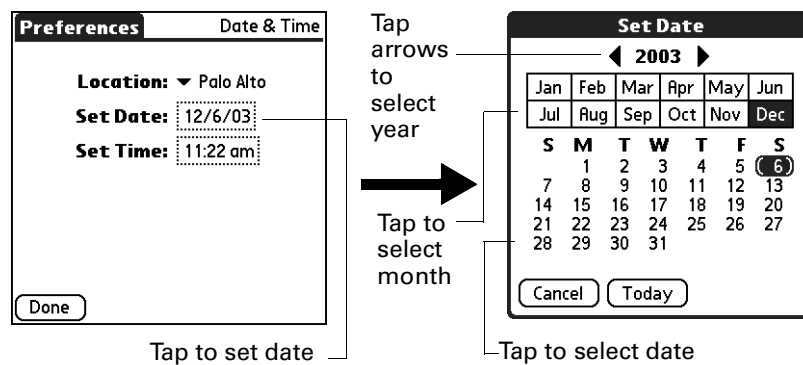
2. Tap the location you want to use as the primary location.

The location you select is typically a large city in the same time zone as the one where you live. If an appropriate choice does not appear in the list, see [“Adding a location”](#) later in this chapter to create a new location.

3. Tap OK.

To set the date:

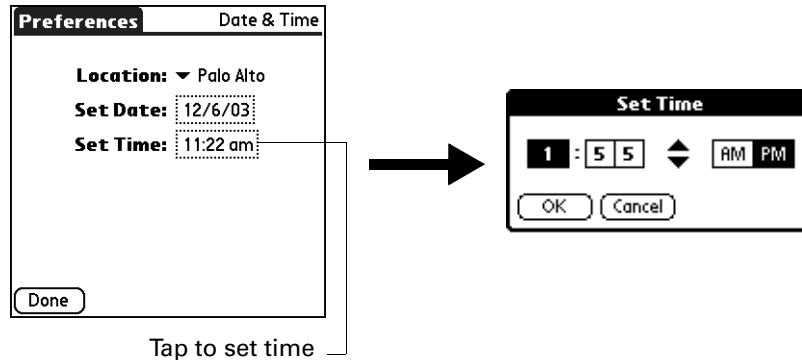
1. Tap Set Date & Time.
2. Tap the Set Date box.
3. Tap the arrows to select the current year.



4. Tap the current month.
5. Tap the current date.
6. Tap Done.

To set the time:

1. Tap Set Date & Time.
2. Tap the Set Time box.



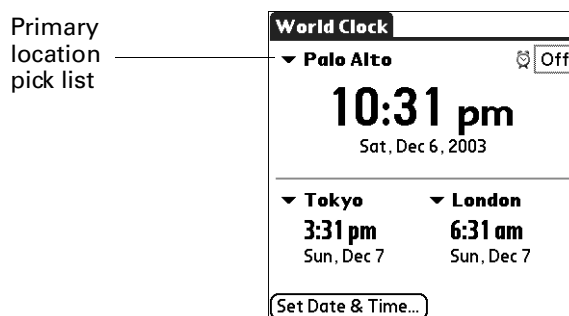
3. Tap the up or down arrows to change the hour.
4. Tap each number of the minute, and then tap the arrows to change the minutes.
5. Tap OK.
6. Tap Done.

Choosing a different primary location

If you travel to another location and you want alerts to appear based on local time, you need to change the primary location to update the system time. You may prefer, however, to use the secondary locations to view the local date and time, and to leave the primary location unchanged.

To change the primary location:

1. Tap the pick list next to the current primary location.



2. Tap the location you want to use as the new primary location.

If the new location is in another time zone, World Clock automatically updates the date and time in all the applications on your handheld.

Setting the secondary locations

The secondary locations display the date and time in two locations other than the primary location. You can use the secondary locations to view the time in places to which you travel or need to contact people.

The date and time in the secondary locations are based on the date and time settings in the primary location.

To select the secondary locations:

1. Tap the pick list next to the secondary location.
2. Tap the location you want to use as the new secondary location.

If an appropriate location does not appear in the list, see the next section, [“Adding a location.”](#)

Adding a location

If an appropriate location does not appear in the Location pick list, you can add a new location to the list. When you add a location, the default Time Zone and Daylight Saving settings are usually correct. However, you can adjust these settings if necessary. When the Daylight Saving options are active, the time change automatically occurs at 1:00 AM on the selected start and end dates.

To add a location:

1. Tap a Location pick list.
2. Select Edit List.
3. Tap Add.
4. Select a location that is in the same time zone as the city you want to add.
5. Tap OK.
6. (Optional) Tap the Name field and modify the location name.
7. (Optional) Tap the Time Zone box and select a time zone.



Edit Location ⓘ

Name: Palo Alto

Time Zone: USA (Pacific)

☒ **This location observes Daylight Saving Time**

Start: First Sunday of April

End: Last Sunday of October

OK Cancel

8. Tap OK.
9. Tap Done.

To set Daylight Saving options:

1. From the Edit Location dialog box, tap the This location observes Daylight Saving Time check box to select it.
2. Tap the Start box.

Set Start Date ⓘ

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Week: ▼ First
Day: ▼ Sunday

First Sunday of April

OK Cancel

3. Tap the month when daylight saving begins.
4. Tap the Week pick list.
5. Select the week when daylight saving begins within the selected month.
6. Tap the Day pick list.
7. Select the day of the week when daylight saving begins within the selected week.
8. Tap OK.
9. Tap the End box and repeat steps 3 through 8 to select when daylight saving ends.
10. Tap OK.

Modifying a location

If you add a location and later realize you did not use the correct settings, you can modify the location.

To modify a location:

1. Tap a Location pick list.
2. Select Edit List.
3. Select the location you want to modify.
4. Tap Edit.
5. Adjust the settings. See [“Adding a location”](#) earlier in this chapter for details.
6. Tap OK.
7. Tap Done.

Removing a location

If you no longer need a location that appears in the Location list, you can remove it. However, you cannot remove a location that is currently assigned to the primary location.

To remove a location:

1. Tap a Location pick list.
2. Select Edit List.
3. Select the location you want to remove.
4. Tap Remove.
5. Tap OK to confirm the deletion.
6. Tap Done.

Setting an alarm

In addition to setting and displaying the date and time, World Clock also provides a convenient travel alarm feature. You can set an alarm to sound during the next 24-hour period.

To set an alarm:

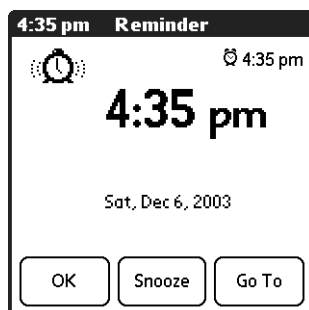
1. Tap the box next to the Alarm  icon to open the Set Alarm dialog box.
2. Tap the time columns to set the hour and minute.
3. Tap OK.
4. When the alarm reminder message appears, do one of the following:

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. An attention indicator blinks in the upper-left corner of the screen to remind you of the pending alarm, and the reminder message appears again in five minutes.

When the reminder message reappears, the current time appears in the Reminder bar and the alarm time appears on the screen.

Tap Go To to open World Clock and to dismiss the alarm.



Using World Clock menus

World Clock menus are shown here for your reference, and World Clock features that are not explained elsewhere in this book are described here.

See “Using menus” in [Chapter 4](#) for information about choosing menu commands.

Options menu



Display Options Opens a dialog box where you can choose which information appears on the World Clock screen.

Show Multiple Locations: Activates the secondary location displays. When it is selected, the secondary locations appear below the primary location.

Date: Activates the date display. When it is selected, the date appears below the time for each location.

Alarm Preferences

Sound: Sets the sound of the alarm. The choices are Alarm, Bumble Bee, Reveille, Sonata, Wake Up, and Warbler.

Volume: Defines how loud the alarm sounds. The choices are Low, Medium, and High.

Performing HotSync® Operations

HotSync® technology enables you to install add-on applications and to synchronize data between one or more Palm OS® handhelds and Palm™ Desktop software or another personal information manager (PIM) such as Microsoft Outlook. You can perform HotSync operations with your Palm™ Zire™ 21 in two ways:

- Using the HotSync cable
- Using infrared communications

Selecting HotSync setup options

You can choose when HotSync Manager will run.

To set the HotSync options on a Windows computer:

1. Click the HotSync icon  in the Windows system tray (lower-right corner of the taskbar).

If you do not see the HotSync icon, you need to start HotSync Manager: On the Windows desktop, click Start, and then select Programs. Navigate to the Palm Desktop software program group, and select HotSync Manager. Alternatively, you can start the Palm Desktop software, which automatically opens the HotSync Manager.

2. Select Setup.
3. Click the General tab, and select one of the following options:

Always available	Adds HotSync Manager to the Startup folder and constantly monitors the communication port for synchronization requests from your handheld. With this option the HotSync Manager synchronizes data even when Palm Desktop software is not running.
Available only when the Palm Desktop software is running	Starts HotSync Manager and monitors requests automatically when you open Palm Desktop software.
Manual	Monitors requests only when you select HotSync Manager from the Start menu.

If you're not sure which option to use, keep the default setting: Always available.

NOTE The settings on the Local tab do not apply to the Palm™ Zire™ 21 handheld.

4. If you are attached to a network, click the Network tab to display the network settings and adjust the options as needed. For more information, see [“Conducting network HotSync operations”](#) later in this chapter.
5. Click OK.

To set the HotSync options on a Mac computer:

1. Double-click the HotSync Manager icon in the Palm folder.
2. Click the HotSync Controls tab, and select any of the following options.

HotSync Enabled/Disabled	Activates the transport monitor and prepares your Mac computer to synchronize with your handheld. By default, the transport monitor is enabled to listen on USB whenever you start your computer.
Enable HotSync software at system startup	Activates the transport monitor automatically each time you start your computer. If this option is not selected, you must open HotSync Manager and select the Enabled option before you can perform a HotSync operation.
Show more detail in HotSync Log	Includes more troubleshooting information in the log that is generated when you perform a HotSync operation.

NOTE The settings on the Connection Settings tab for a direct HotSync operation do not need to be adjusted for the Zire 21 handheld; they are set automatically when you perform the first HotSync operation.

3. Close the HotSync Software Setup window.

Customizing HotSync application settings

For each application, you can define a set of options that determines how records are handled during synchronization. These options are called a *conduit*. By default, a HotSync operation synchronizes all files between the handheld and Palm Desktop software.

In general, you should leave the settings to synchronize all files. The only reason you might want to change these settings is to overwrite data on either your handheld or Palm Desktop software, or to avoid synchronizing a particular type of file because you don't use it.

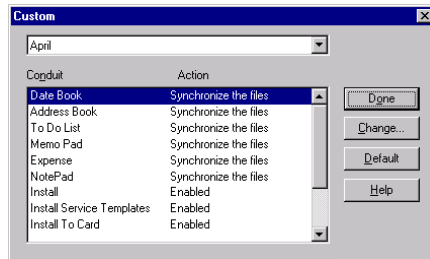
In addition to the conduits for Date Book, Address Book, Note Pad, To Do List, and Memo Pad, Palm Desktop software includes System and Install conduits. The System conduit backs up the system information stored on your handheld, including Graffiti® 2 ShortCuts. The Install conduit installs add-on applications on your handheld.

To customize HotSync application settings on a Windows computer:

1. Click the HotSync icon  in the Windows system tray (lower-right corner of the taskbar).

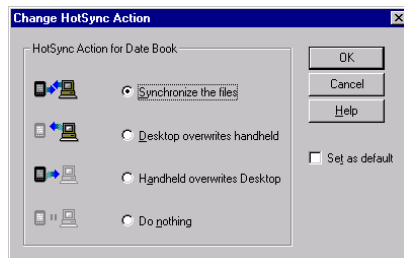
You can also click the HotSync command on the Palm Desktop software menu bar.

2. From the HotSync Manager menu, select Custom.
3. Select the appropriate username from the list.
4. Select an application in the Conduit list.
5. Click Change.



6. For each application, click the direction in which you want to write data, or click Do Nothing to skip data transfer for an application.

Changing the HotSync setting from the default affects only the *next* HotSync operation. Thereafter, the HotSync Actions revert to their default settings. To use a new setting on an ongoing basis, select the Set As Default box. Thereafter, whatever you selected as the default setting is used when you click the Default button in the Custom dialog box.

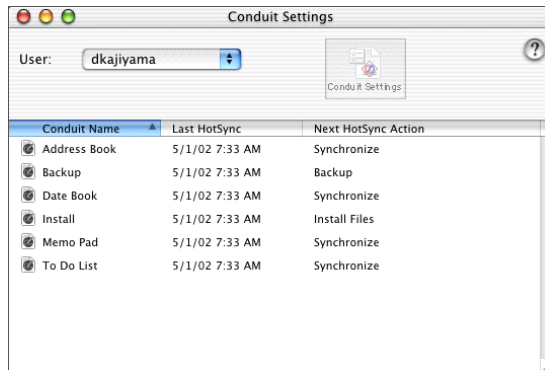


7. Click OK.
8. Click Done to activate your settings.

To customize HotSync application settings on a Mac computer:

1. Double-click the Palm Desktop icon in the Palm folder.
2. From the HotSync menu, select Conduit Settings.
3. From the User pop-up menu, select the appropriate username.
4. Select an application in the Conduit list.

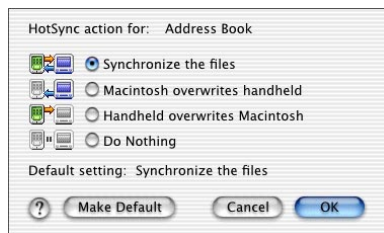
5. Click Conduit Settings.



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6. For each application, click the direction in which you want to write data, or click Do Nothing to skip data transfer for an application.

Changing the HotSync setting from the default affects only the *next* HotSync operation. Thereafter, the HotSync Actions revert to their default settings. To use a new setting on an ongoing basis, click Make Default. Thereafter, whatever you selected as the default setting is used for HotSync operations.



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Mac OS X

7. Click OK.

8. Close the Conduit Settings window.

Conducting cable HotSync operations

The simplest way to synchronize data is to perform a direct HotSync operation by turning on your handheld, connecting it to the cable, and tapping the Star icon.

Performing a cable HotSync operation: Windows computers

The first time you synchronize your data, you need to enter user information on Palm Desktop software. After you enter this information and synchronize with your handheld, the HotSync Manager recognizes your handheld and doesn't ask for this information again.

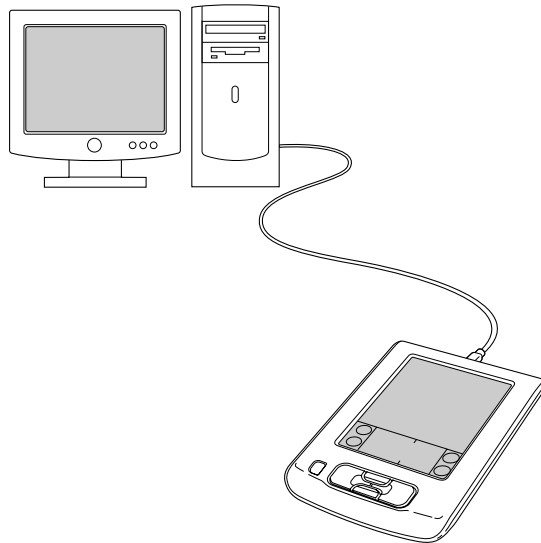
If you are a system administrator preparing several handhelds for a group of users, you may want to create a user profile. See [“Creating a user profile”](#) later in this chapter before performing the following steps.

IMPORTANT You must perform your *first* HotSync operation with a local, direct connection or with infrared communication, rather than with a network.

The following steps assume that you have already installed Palm Desktop software. If you have not installed this software, see [“Step 3: Install software”](#) in [Chapter 1](#) for instructions.

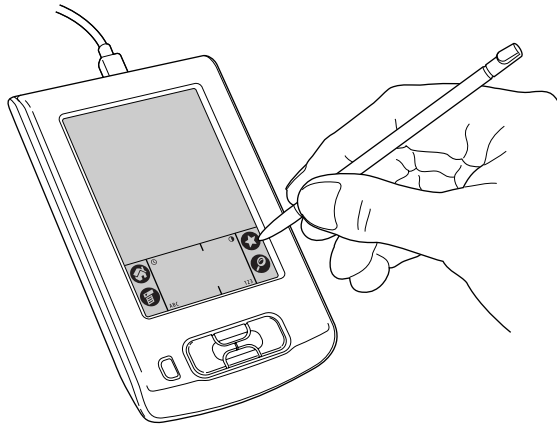
To perform a local HotSync operation on a Windows computer:

1. Connect your handheld to the cable.



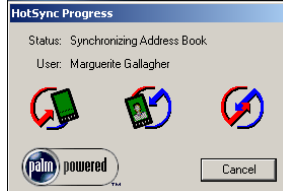
2. If the HotSync Manager is not running, start it: On the Windows desktop, click Start, and then select Programs. Navigate to the Palm Desktop software program group, and select HotSync Manager. Alternatively, you can start the Palm Desktop software, which automatically opens the HotSync Manager.

3. Turn on your handheld, and tap the Star icon ★.



IMPORTANT The first time you perform a HotSync operation, you must enter a username in the New User dialog box and click OK. Every handheld should have a unique name. To prevent loss of a user's records, never try to synchronize more than one handheld to the same username.

The HotSync Progress dialog box appears, and synchronization begins.



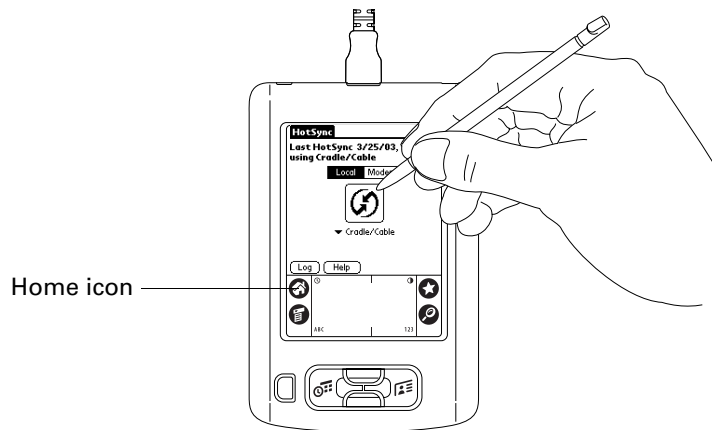
4. Wait for a message on your handheld indicating that the process is complete.

After the HotSync process is complete, you can disconnect your handheld from the cable.

To perform a HotSync operation using an alternate cable method:

1. Connect the HotSync cable to your handheld and your computer.
2. Turn on your handheld.
3. Tap the Home icon (🏠) to open the Home screen.

4. Tap the HotSync icon  in the Home screen.
5. Tap the HotSync logo in the middle of the screen.

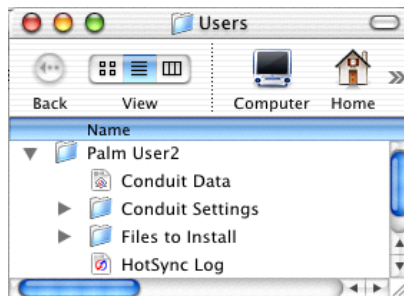


Performing a cable HotSync operation: Mac computers

When you installed Palm Desktop software, you entered a username. This username is the connection between your handheld and your computer.

The first time you perform a HotSync operation the Palm Desktop software does the following:

- Adds a username to your handheld.
- Creates a folder for the username in the Users folder inside the Palm folder. For example, if you entered Jane Garcia as your username, a folder named Jane Garcia is created in the Users folder.



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- Creates a file named User Data in your username folder.

Username appears in the User pop-up menu on the right side of the toolbar. You can change users by selecting a new name in the pop-up menu.

Each subsequent time you perform a HotSync operation, HotSync Manager reads the username from your handheld and synchronizes the data in the folder of the same name.

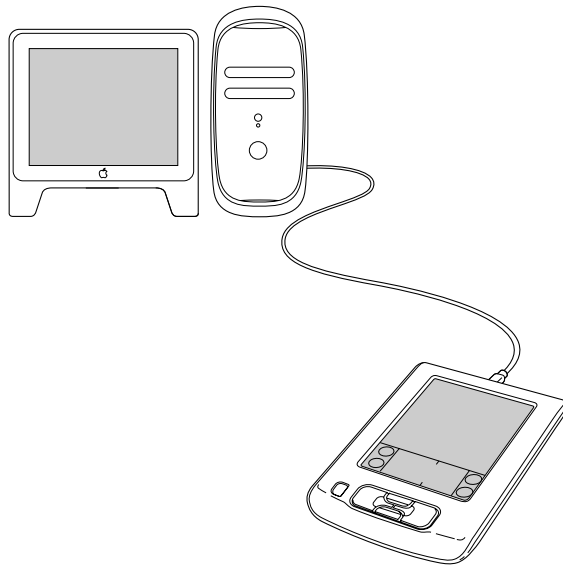
Be sure you select the correct username from the User pop-up menu before entering data on Palm Desktop or performing a HotSync operation.

If you are a system administrator preparing several handhelds for a group of users, you may want to create a user profile. See [“Creating a user profile”](#) later in this chapter before performing the following steps.

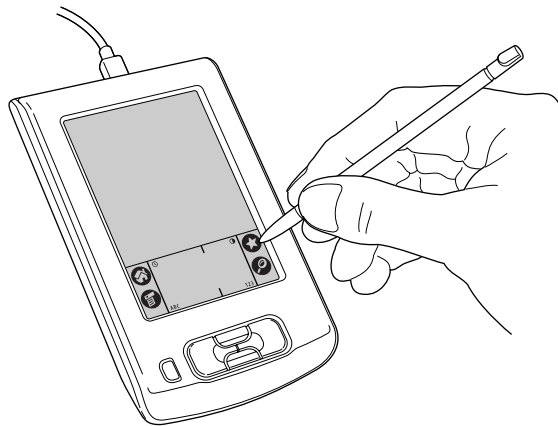
The following steps assume that you have already installed Palm Desktop software. See [“Step 3: Install software”](#) in [Chapter 1](#) if you have not installed this software.

To perform a local HotSync operation on a Mac computer:

1. Connect your handheld to the HotSync cable.

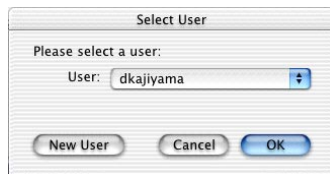


2. Make sure that HotSync Manager is enabled: Double-click the HotSync Manager icon in the Palm folder. Click the HotSync Controls tab, and make sure the Enabled option is selected.
3. Turn on your handheld, and tap the Star icon .



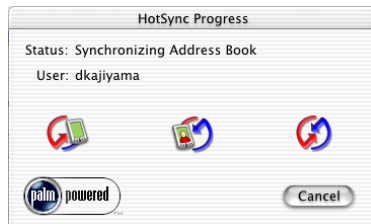
The HotSync Progress dialog box appears, followed by the Select User dialog box.

4. In the Select User dialog box, select the username you entered when you installed the Palm Desktop software, and click OK.



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Mac OS X

The HotSync Progress dialog box reappears, and synchronization begins.



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Mac OS X

5. Wait for a message on your handheld indicating that the process is complete.
After the HotSync process is complete, you can disconnect your handheld from the cable.

NOTE You can also perform a HotSync operation using an alternate cable method. See the last section in [“Performing a cable HotSync operation: Windows computers”](#) in this chapter for more information.

Conducting IR HotSync operations

You can use the infrared (IR) port on your handheld to perform HotSync operations. When you perform an IR HotSync operation, you don't need your cable. However, you must have a computer that's equipped with an IR port and that supports the IrCOMM implementation of the Infrared Data Association (IrDA) standards. This is especially useful if you travel with an infrared-enabled laptop. You simply enable infrared communication on your laptop and handheld and follow the steps in [“Performing an IR HotSync operation”](#) later in this section.

Preparing your computer for infrared communication

Before you can perform a HotSync operation using the IR port, the computer with which you want to synchronize must fulfill these requirements:

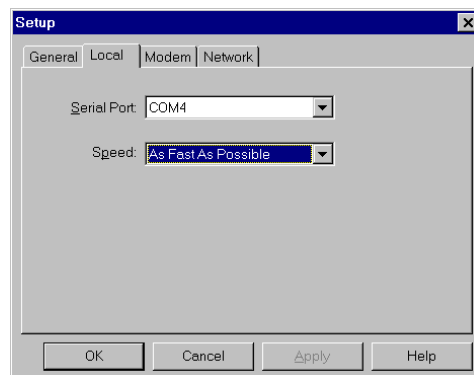
- Your computer must support the IrCOMM implementation of the IrDA standards.
- Your computer must have an enabled infrared port that's built into the computer, or an enabled infrared device attached to the computer.

- Some desktop computers may require an infrared device attached to a physical COM port. Laptops are likely to have a built-in IR port, so no external device is necessary.
- Your computer must have an installed infrared driver.
- If you have an external infrared device attached to your computer, a driver is probably included with the device. Consult the documentation included with the device for information on installing the required driver.

Check your computer's documentation to learn if the computer supports infrared communication.

To configure HotSync Manager for infrared communication on a Windows computer:

- Click the HotSync Manager icon  in the Windows system tray, and make sure that Infrared is selected.
 - If you have an Infrared option on the HotSync Manager menu, and that option is selected, skip to [“Performing an IR HotSync operation.”](#)
 - If you do not have an Infrared option on the HotSync Manager menu, complete the following steps:
 - a. Make sure that Local Serial is selected on the menu.
 - b. From the HotSync Manager menu, select Setup.
 - c. Click the Local tab.
 - d. In the Serial Port drop-down box, select the simulated port that your computer uses for infrared communication.



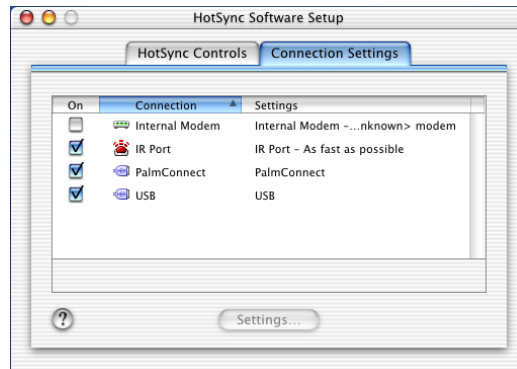
See the documentation for your operating system for instructions on finding the simulated port. This information is usually located in the Control Panel.

- e. Click OK.

NOTE You can continue using the cable while HotSync Manager is configured for infrared communication.

To configure HotSync Manager for infrared communication on a Mac computer:

1. Double-click the HotSync Manager icon in the Palm folder.
2. In the HotSync Controls tab, select Enabled.
3. Click the Connection Settings tab.
4. Select the On check box next to IR port.



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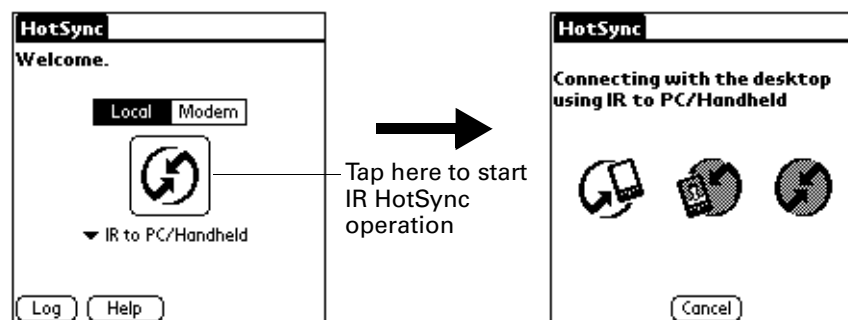
5. Close the HotSync Software Setup window.

Performing an IR HotSync operation

After you complete the steps to prepare for performing an IR HotSync operation, it's easy to perform the actual operation.

To perform an IR HotSync operation on your handheld:

1. Tap the Home icon .
2. Select the HotSync icon .
3. Tap Local.
4. Tap the pick list below the HotSync icon and select IR to a PC/Handheld.
5. Position the IR port of your handheld within a couple of inches of the infrared port of your computer.
6. Tap the HotSync icon to start the IR HotSync operation.



Returning to cable HotSync operations

It's easy to return to using the cable for HotSync operations.

You can continue using your cable while HotSync Manager is configured for infrared communication. Use the following instructions to return to local USB cable HotSync operations only when necessary, such as when you have disconnected the cable from the USB port.

To return to local cable HotSync operations on a Windows computer:

1. Connect the cable to the USB port of the computer you use for HotSync operations.
2. Click the HotSync Manager icon  in the Windows system tray, and select Local USB if it is not already selected.

On a Mac computer, the HotSync Manager software monitors all ports at the same time. However, you may want to turn off the IR port when you're not using it to improve performance of HotSync operations.

The next time you want to perform a HotSync operation, just tap the Star icon, as you always did before.

Conducting network HotSync operations

When you use the network HotSync technology, you can take advantage of the local area network (LAN) and wide area network (WAN) connectivity available in many office environments. Network HotSync technology enables you to perform a HotSync operation by using a cable that is connected to any computer on your LAN or WAN (provided that the computer connected to the cable also has the network HotSync technology installed, your computer is on, and the HotSync Manager is running). The third-party software and accessories required to make a wireless connection, and those required to dial in to a network are sold separately.

IMPORTANT Network HotSync technology is available only on Windows computers. You must perform the first HotSync operation by using a local, direct connection or infrared communication. After that, you can perform a network HotSync operation.

Connecting to your company's dial-in server

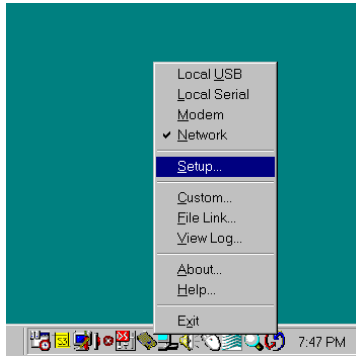
A network HotSync operation requires the following (consult your system administrator for assistance):

- Your computer has TCP/IP support installed.
- Both your company's network system and its remote access server support TCP/IP.
- You have a remote access account.

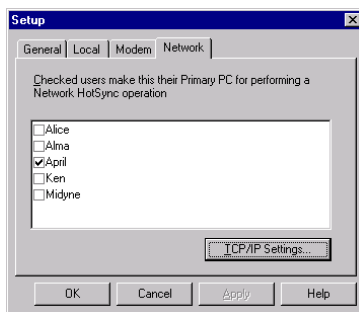
The third-party software and accessories needed for connecting to your company's dial-in server (network modem) are sold separately.

To prepare your Windows computer for a network HotSync operation:

1. Click the HotSync Manager icon  in the Windows system tray.
2. From the HotSync Manager menu, select Network.



3. From the HotSync Manager menu, select Setup.
4. Click the Network tab and make sure your username has a checkmark next to it. If the checkmark is not there, click the check box next to your username.



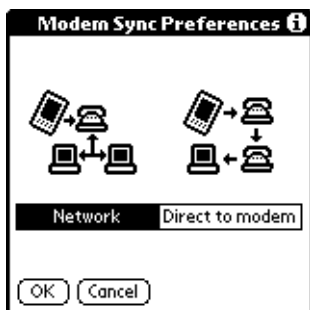
5. Click OK.
6. Connect your handheld to the cable, and perform a HotSync operation.

The HotSync operation records network information about your computer on your handheld. With this information, your handheld can locate your computer when you perform a HotSync operation over the network.

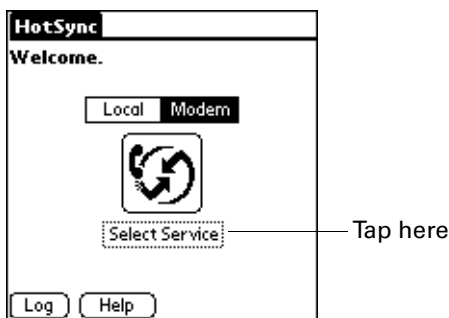
To prepare your handheld for a network HotSync operation:

1. Tap the Home icon .
2. Select the HotSync icon .
3. Tap the Menu icon .
4. Select Modem Sync Prefs from the Options menu.

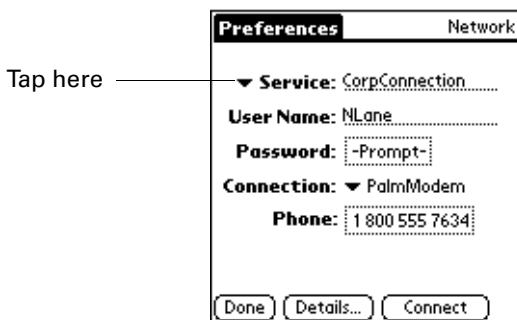
5. Tap Network.



6. Tap OK.
7. Tap Modem.
8. Tap Select Service.



9. Tap Service and select a service.



10. Tap Done.
11. Tap the Menu icon .
12. Select Conduit Setup from the Options menu.
13. Tap the check boxes to deselect the files and applications that you do *not* want to synchronize during a HotSync operation. The default setting is to synchronize all files.
14. Tap OK.

Selecting the conduits for a network HotSync operation

The Conduit Setup dialog box on your handheld enables you to define which files and/or applications synchronize during a network HotSync operation.

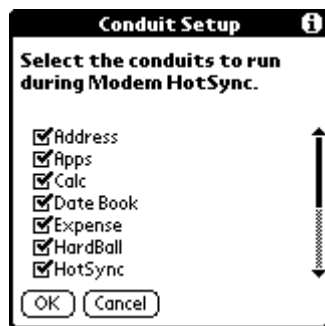
IMPORTANT If you are synchronizing data between Microsoft Outlook and your handheld, you can customize the conduit settings from your handheld by selecting Microsoft Outlook from the HotSync Options menu. For complete details about MS Outlook conduit settings, see the MS Outlook conduit help in HotSync Manager.

Follow these steps to access MS Outlook conduit help:

- Click the HotSync Manager icon  in the Windows system tray.
- Select Custom.
- Select one of the Outlook conduits from list.
- Select Change.
- Tap the Help icon.

To change the Conduit Setup for a network HotSync operation:

1. Tap the Home icon .
2. Select the HotSync icon .
3. Tap the Menu icon .
4. Select Conduit Setup from the Options menu.
5. Tap the check boxes to deselect the files and applications that you do *not* want to synchronize during a network HotSync operation. The default setting is to synchronize all files.



Applications that do not have a database (such as games) do not synchronize, even if you select the item in the Conduit Setup dialog box.

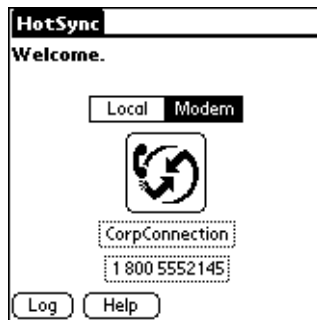
6. Tap OK.

Performing a network HotSync operation

After you prepare your computer and your handheld and select your Conduit Setup options, you are ready to perform a network HotSync operation.

To perform a network HotSync operation:

- Tap the modem HotSync icon to begin the operation.



Using File Link

The File Link feature enables you to import Address Book and Memo Pad information onto your handheld from a separate external file such as a company phone list. HotSync Manager stores the data in a separate category on your Palm Desktop software and your handheld. You can configure the File Link feature to check for changes to the external file when you perform a HotSync operation.

With File Link you can import data stored in any of the following formats:

- Comma-separated (*.csv)
- Memo Pad archive (*.mpa)
- Address Book archive (*.aba)
- Text (*.txt)

For information on how to set up a file link, see the Palm Desktop online Help.

NOTE The File Link feature is not available in Palm Desktop software for Mac.

Creating a user profile

A user profile enables you to install the same set of data onto multiple Palm OS handhelds before each handheld is individualized with a specific username and data file.

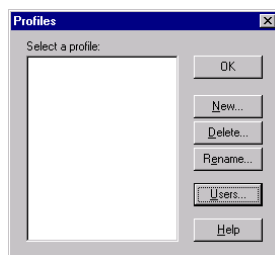
A handheld that is preconfigured with a user profile can be given to anyone because the handheld is not yet identified by a unique username. The handheld acquires a unique username when the new user performs his or her first local HotSync operation.

For example, suppose a sales organization wants to distribute two dozen handhelds that all have a common company phone list, a set of memos, and several key applications. A user profile can be created to install the common data before the handhelds are distributed to the employees who will use them. Then when the employees perform their first HotSync operation, the common data becomes part of their individual data file.

NOTE The handhelds that are synchronized with a user profile must be either new ones that have never been synchronized or handhelds that have had their usernames and data removed by a hard reset.

To create a user profile on a Windows computer:

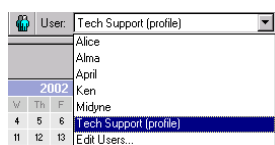
1. Open Palm Desktop software.
2. From the Tools menu, select Users.
3. Click Profiles.
4. Click New.



5. Enter a unique name for the profile, and click OK.



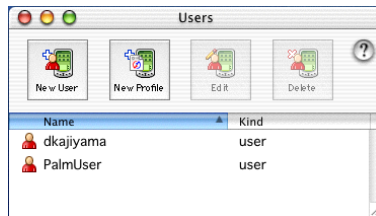
6. Repeat steps 3 through 5 for each profile that you want to create, and then click OK to return to Palm Desktop software.
7. Select the profile from the User list, and create the data for the profile (such as a company phone list, and so on).



To create a user profile on a Mac computer:

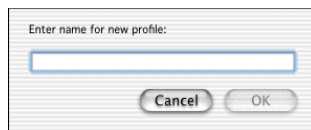
1. Open Palm Desktop software.
2. From the User pop-up menu, select Edit Users.

3. Click New Profile.



Shown with
Mac OS X

4. Enter a unique name for the profile, and click OK.



Shown with
Mac OS X

5. Close the Users window.
6. From the User pop-up menu, select the new profile.
7. Create the data for the profile (such as a company phone list).
8. From the HotSync menu, select Conduit Settings.
9. Select the conduit settings for the profile. For details, see [“Customizing HotSync application settings”](#) earlier in this chapter.

Performing the first HotSync operation with a user profile

After you create a user profile, you are ready to transfer the information to the new handheld during the first HotSync operation.

To use a profile for a first-time HotSync operation on a Windows computer:

1. Connect the new handheld to the cable.
2. Press the HotSync button  on the cable.
3. Click Profiles.
4. Select the profile you want to load on the handheld, and click OK.

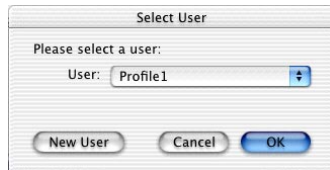


5. Click Yes to transfer all the profile data to the handheld.

The next time you perform a HotSync operation, Palm Desktop software prompts you to assign a username to the handheld.

To use a profile for a first-time HotSync operation on a Mac computer:

1. Connect the new handheld to the HotSync cable.
2. Press the HotSync button  on the cable.
3. Select the profile you want to load onto the handheld, and click OK to transfer all the profile data to the handheld.



Shown with
Mac OS X

The next time you perform a HotSync operation, Palm Desktop software prompts you to assign a username to the handheld.

Setting Preferences for Your Handheld

Preferences enable you to customize the configuration options on your handheld. The options are grouped into three categories: General, Communication, and Personal. Each category provides access to a group of relevant Preferences screens. Use Preferences to do the following:

- Access the General Preferences screens to customize any of the following settings:

Date & Time	Set the location, date, and time.
Digitizer	Calibrate the screen on your handheld.
Formats	Set the country default and the formats for times, dates, calendar, and numbers.
Graffiti 2	Select alternate strokes for selected Graffiti® 2 characters.
Keylock	Prevent your handheld from turning on accidentally.
Power	Set these features: auto-shutoff interval, On While Charging, and Beam receive.
Security	Set a password, privacy options, and locking options.
Sounds & Alerts	Select system, game, and alarm options from two profiles: Custom and Silent.
Writing Area	Enable and disable Writing Area Preferences and show or hide penstrokes while writing Graffiti 2 characters.

- Access the Communication Preferences screens to customize any of the following settings:

Connection Configure communication settings.

Network Configure your handheld for use with a network.

- Access the Personal Preferences screens to customize any of the following settings:

Buttons Assign new applications to the following: Address Book button, Date Book button, the Star icon, and the full-screen pen stroke command.

Owner Enter your name, phone number, and other owner information to your handheld.

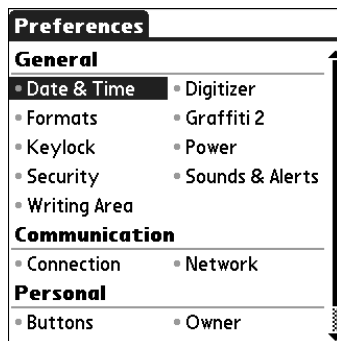
ShortCuts Define a list of Graffiti 2 abbreviations.

Setting General Preferences

The General Preferences category enables you to access screens where you can modify Date & Time, Digitizer, Formats, Power, Security, Sounds & Alerts, and Writing Area settings. This section provides details about each of these screens.

To open the General Preferences screens:

1. Tap the Home icon .
2. Tap the Prefs icon .
3. From the General Preferences list, select the name of the Preferences screen you want to view.



Date & Time Preferences

The Date & Time Preferences screen enables you to choose a primary location and to set the date, time, and time zone for that location. You can also indicate whether this location observes daylight saving time and the dates daylight saving time starts and ends. All of these settings also appear as the primary location in the World Clock application and are used by all the applications on your handheld.

Although you can change the primary location settings from the Date & Time Preferences screen, we recommend that you use the World Clock application to change these settings. See [“Setting the primary location”](#) in [Chapter 12](#) for details.

To set the location:

1. From the General Preferences list, select Date & Time.
2. Tap the Location pick list and select the location you want to use as your primary location.

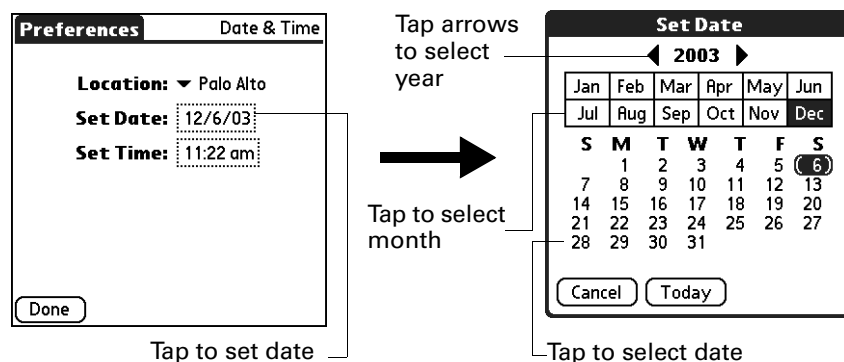
The location you select should be a large city in the same time zone as the one where you live. If an appropriate choice does not appear in the list, see [“Adding a location”](#) in [Chapter 12](#) to create a new location.

3. Tap Done.

When you travel, changing the primary Location setting automatically resets the date and time on your handheld based on the local time zone, but it does not change the time of appointments set in Date Book.

To set the date:

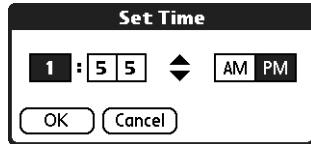
1. From the General Preferences list, select Date & Time.
2. Tap the Set Date box.
3. Tap the arrows to select the current year.



4. Tap the current month.
5. Tap the current date.
6. Tap Done.

To set the time:

1. From the General Preferences list, select Date & Time.
2. Tap the Set Time box.



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

To set the time zone and daylight saving time:

1. From the General Preferences list, select Date & Time.
2. Tap the Location pick list.
3. Select Edit List.
4. Select the location where you want to set the time zone.
5. Tap Edit to open the Edit Location dialog box.
6. Follow the steps under [“Adding a location”](#) in [Chapter 12](#) to select the time zone and daylight saving time settings.
7. Tap Done.

Digitizer Preferences

The Digitizer Preferences screen opens the digitizer calibration screen. This is the same screen that appears when you start your handheld for the first time.

Calibration aligns the internal circuitry of your handheld with its touch-sensitive screen so that when you tap an element on the screen, the handheld can detect exactly which task you want to perform.

You may need to recalibrate your screen after a hard reset or if your digitizer drifts. You may need to repeat this process until the calibration registers.

To calibrate your handheld screen:

1. From the General Preferences list, select Digitizer.
2. Tap the targets as indicated on the screen as precisely as possible.

Formats Preferences

Use the Formats Preferences screen to set the country default and the display format of the dates, times, and numbers on your handheld.

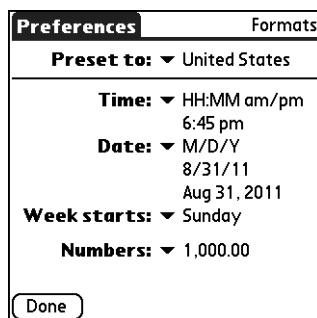
Country default

The country default sets date, time, week start day, and number conventions based on geographic regions where you might use your handheld. For example, in the United Kingdom, time often is expressed using a 24-hour clock. In the United States, however, time is expressed using a 12-hour clock with an AM or PM suffix.

All your handheld applications use the Country default settings. You can, however, customize your own preferences as described in [“Time, date, week start, and numbers formats”](#) later in this chapter.

To set the country default:

1. From the General Preferences list, select Formats.
2. Tap the country name pick list.



3. Select the setting you want to use.
4. Tap Done.

Time, date, week start, and numbers formats

The Time setting defines the format for the time of day. The time format that you select appears in all applications on your handheld.

To select the time, date, week start, and numbers format:

1. From the General Preferences list, select Formats.
2. Tap the Time pick list and select a format.
3. Tap the Date pick list and select a format.
4. Tap the Week starts pick list, and select whether you want the first day of the week to be Sunday or Monday.

This setting controls the Day, Week, and Month views in Date Book and all other aspects of your handheld that display a calendar.

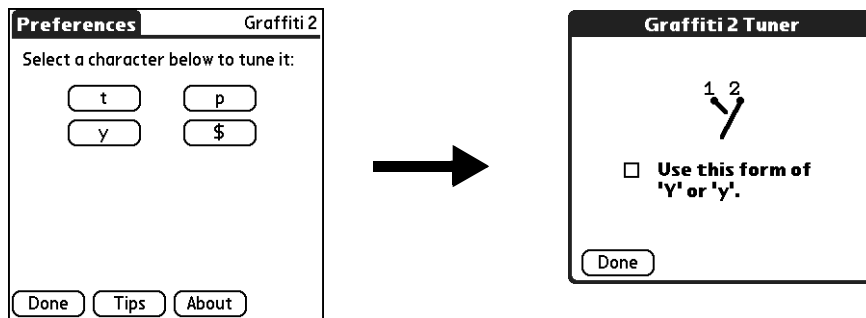
5. Tap the Numbers pick list, and select formats for the decimal point and thousands separator.
6. Tap Done.

Graffiti 2 Preferences

The Graffiti 2 Preferences screen enables you select an alternate stroke shape for specific characters.

To select alternate strokes:

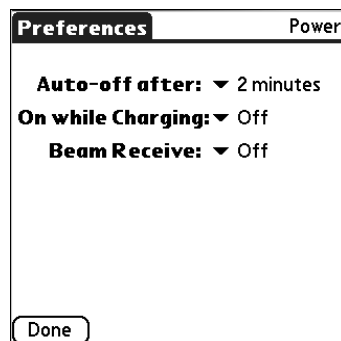
1. From the General Preferences list, select Graffiti 2.
2. Tap the character you want to change.



3. Tap the check box to activate the alternate stroke.
4. Tap Done.
5. Repeat steps 2 through 4 for other characters.
6. Tap Done.

Power Preferences

The Power Preferences screen enables you to set power consumption options. You can control when your handheld turns off and whether to receive beamed information.



Auto-off after

Your handheld has an automatic shutoff feature that turns off the power after a period of inactivity. This feature helps conserve battery power in case you forget to turn off your handheld.

If you find that your handheld shuts itself off before you finish reviewing the information on the screen, you can increase the time setting of the automatic shutoff feature.

To set the Auto-off after interval:

1. From the General Preferences list, select Power.
2. Tap the Auto-off after pick list.
3. Select the setting you want to use for the automatic shutoff feature: 30 seconds, 1 minute, 2 minutes, or 3 minutes.
4. Tap Done.

On While Charging setting

You can choose to leave your handheld on when it is connected to the HotSync cable, or when you are recharging your battery, so that you can continue to view your data. By default, your handheld remains on when it is connected to the cable and to a power source.

To change the On While Charging setting:

1. From the General Preferences list, select Power.
2. Tap the On While Charging pick list.
3. Select Off to turn off your handheld when it is connected to the cable.
4. Tap Done.

Beam Receive

You can choose to turn off the Beam Receive feature. This prohibits anyone from beaming information to your handheld. It also results in a slight saving of battery power. By default, Beam Receive is enabled.

To turn off the Beam Receive feature:

1. From the General Preferences list, select Power.
2. Tap the Beam Receive pick list.
3. Select Off to disable receiving beamed information.
4. Tap Done.

Security Preferences

The Security Preferences help you prevent unauthorized users from viewing entries that you want to protect. Use the Security Preferences to do the following:

- Lock and turn off your handheld so that it does not operate until you enter the correct password.
- Mask all records that you mark as private so that the information appears as gray bars.
- Hide all records that you mark as private so that they do not appear on any screen.

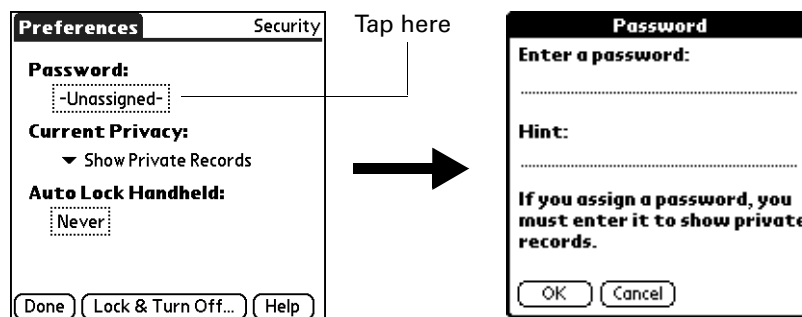
You can mask and hide private records with or without a password. Without a password, private records are hidden or masked until you set the Security Preferences to show them. With a password, you must enter the password to view the private entries.

Assigning a password

You can assign a password to protect your private records and to lock your handheld.

To assign a password:

1. From the General Preferences list, select Security.
2. Tap the Password box.
3. Enter a password.
4. Enter a hint to help you remember your password if you forget it. This is optional.



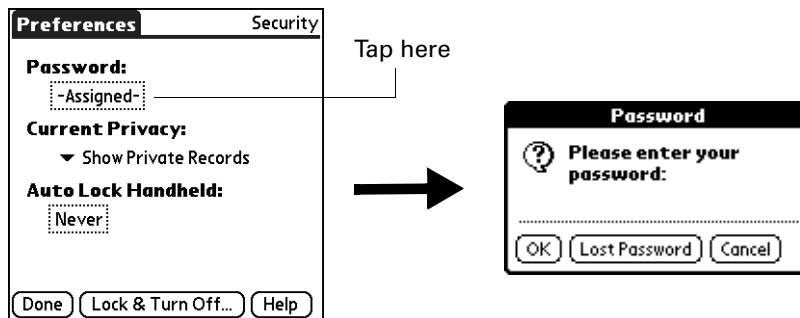
5. Tap OK.
6. Enter the *same* password a second time, and tap OK.
7. Tap Done.

Changing or deleting a password

Once you define a password for your handheld, you can change or delete it at any time. You must enter the current password before you can change or delete it.

To change or delete your password:

1. From the General Preferences list, select Security.
2. Tap the Password box.
3. Enter the current password.



4. Tap OK.
5. Do one of the following:
 - To change the password and hint, enter the new password and hint, and tap OK.
 - To remove the password, tap Unassign.



6. Tap Done.

Locking your handheld

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

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

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

To set your handheld to lock when you turn it off:

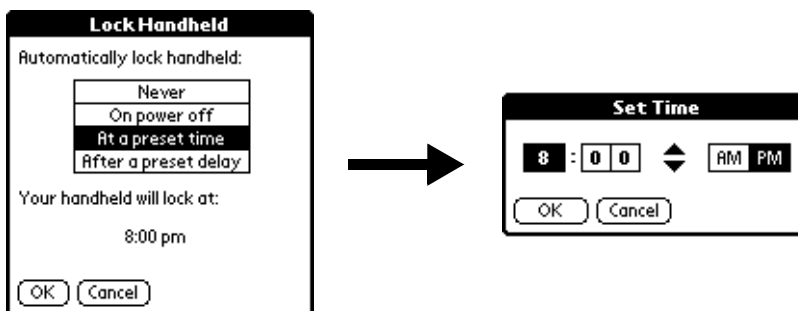
1. From the General Preferences list, select Security.
2. Tap the Auto Lock Handheld box, and then enter your password.



3. Select On power off.
4. Tap OK.
5. Tap Done.

To set your handheld to lock at a preset time:

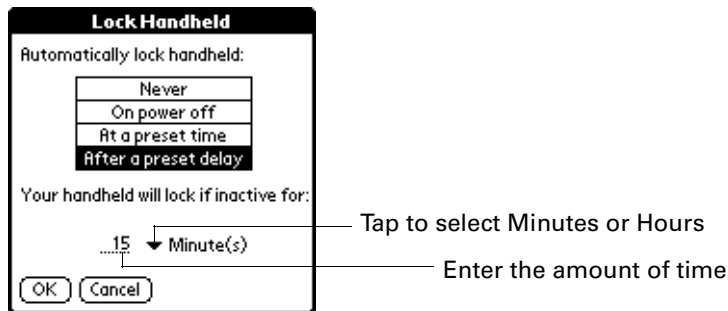
1. From the General Preferences list, select Security.
2. Tap the Auto Lock Handheld box, and then enter your password.
3. Select At a preset time, and then use the arrows to set the time.



4. Tap OK.
5. Tap Done.

To set your handheld to lock after a period of inactivity:

1. From the General Preferences list, select Security.
2. Tap the Auto Lock Handheld box, and then enter your password.
3. Select After a preset delay.

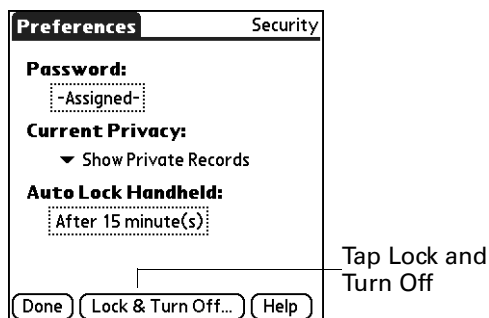


4. Enter the inactive period, and then select Minute(s) or Hour(s) from the pick list.
5. Tap OK.
6. Tap Done.

CAUTION If you lock your handheld, you must enter the exact password to reactivate your handheld. If you forget the password, your handheld will present the hint you have 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 at the next HotSync operation. See [“Performing a hard reset”](#) in [Appendix A](#) for more information.

To lock and turn off your handheld manually:

1. From the General Preferences list, select Security.
2. Tap Lock & Turn Off.



3. Tap Off & Lock.
4. To start your handheld, turn it on and then enter the password.
5. Tap Done.

Recovering from a forgotten password

If you forget your password, your handheld will display the password hint, if you entered one, to help you remember the password. If you are still unable to remember the password, you can delete it from your handheld. Deleting a forgotten password also deletes all entries and files marked Private.

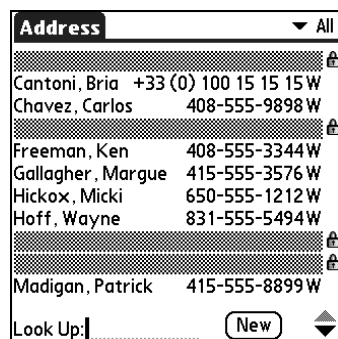
IMPORTANT If you synchronize with your computer before deleting a forgotten password, your handheld restores your private entries the next time you perform a HotSync operation, but it does not restore the password.

To delete a forgotten password:

1. From the General Preferences list, select Security.
2. Tap the Password box.
3. Tap Lost Password.
4. Tap Yes.

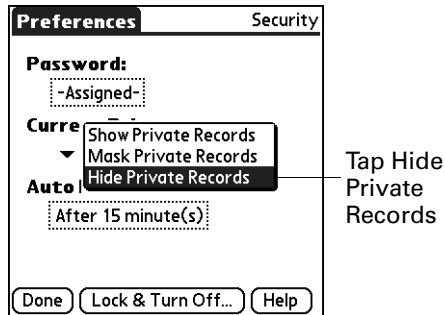
Making records private

In many applications, you can make individual records private. Private records remain visible and accessible, however, until you select the Security setting to hide or mask all private records. Masked records appear as gray placeholders in the same position in which they would appear if they were not masked, and are marked with a lock icon. Hidden records disappear completely from the screen. If you define a password for your handheld, you must enter it to display private records.



To hide all private records:

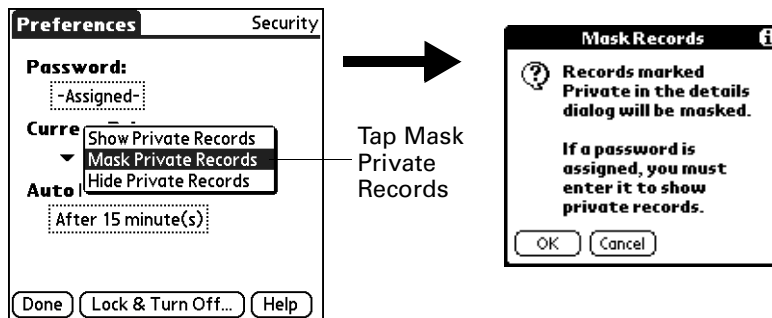
1. From the General Preferences list, select Security.
2. Tap the Current Privacy pick list and select Hide Private Records.



3. Tap OK to confirm that you want to hide private records.
4. Tap Done.

To mask all private records:

1. From the General Preferences list, select Security.
2. Tap the Current Privacy pick list and select Mask Private Records.

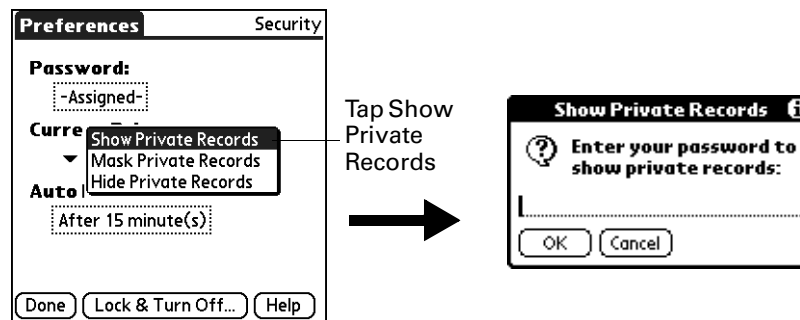


3. Tap OK to confirm that you want to mask private records.
4. Tap Done.

To display all private records:

1. From the General Preferences list, select Security.
2. Tap the Current Privacy pick list and select Show Private Records.

If you do not have a password, hidden and masked records become visible.
If you have a password, the Show Private Records dialog box appears. Go to step 3.



3. Enter your password, and then tap OK.
4. Tap Done.

To unmask individual records:

1. Select a masked record.

If you do not have a password, a masked record becomes visible. If you have a password, the Show Private Records dialog box appears. Go to step 2.

2. Enter your password, and then tap OK.

To make a record private:

1. Display the entry that you want to make private.
2. Tap Details.
3. Tap the Private check box to select it.
4. Tap OK.

Sounds & Alerts Preferences

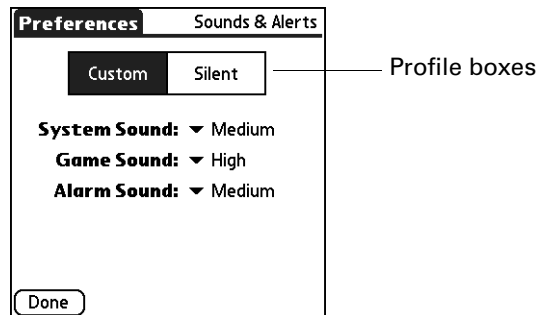
You can choose from two Sounds & Alerts profiles:

- | | |
|---------------|---|
| Custom | Configure this profile with your own personal settings. |
| Silent | Select this profile to use alerts without sound. |

TIP When you connect a headset to your handheld, the external speaker is automatically silenced, the Sounds & Alerts settings are maintained, and all volume levels are automatically adjusted for use with a headset.

To select a profile:

1. From the General Preferences list, select Sound & Alerts.
2. Tap the Custom or Silent profile box.



3. Tap Done.

System Sound, Game Sound, and Alarm Sound settings

Your handheld uses a variety of sounds. The System Sound, Game Sound, and Alarm Sound settings enable you to turn the sounds on or off and to adjust the volume level.

To set the sound settings:

1. From the General Preferences list, select Sound & Alerts.
2. Tap Custom.
3. Tap the System Sound pick list and select the sound level.

IMPORTANT When you turn off the System Sounds, you also turn off the “chime” tones associated with the HotSync operation.

4. Tap the Game Sound pick list and select the sound level.
5. Tap the Alarm Sound pick list and select the sound level.
6. Tap Done.

The Game Sound setting works only with games that are programmed to respond to this setting. Older games typically do not respond to this setting.

To change the tone of an alarm:

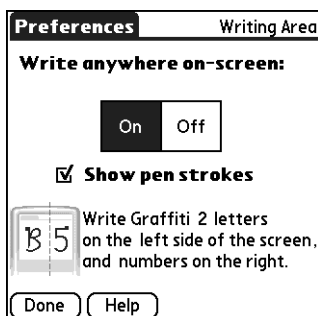
1. Open the Date Book application.
2. Tap the Menu icon .
3. From the Options menu, tap Preferences.
4. Tap the Alarm Sound pick list and select the tone.

Writing Area Preferences

Writing Area Preferences offer you the option of using the full screen to enter Graffiti 2 characters. When Writing Area Preferences are turned on and active, you can write letters anywhere on the left side of the screen, write numbers anywhere on the right side of the screen, and write capital letters across the imaginary division line in the middle of the screen. You access buttons and other controls that appear on the screen by tapping and holding the control until it activates.

To turn Writing Area Preferences on and off:

1. From the General Preferences list, select Writing Area.



2. Tap On or Off.
3. If you selected On in the previous step, select the Show penstrokes check box to display penstrokes while writing, or deselect this check box to hide penstrokes.
4. Tap Done.

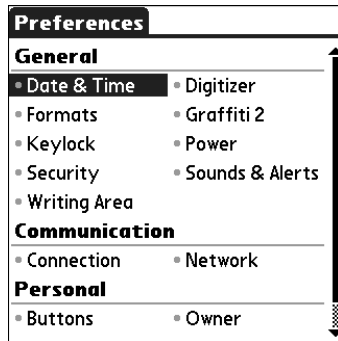
See [“Full-screen writing area”](#) in [Chapter 3](#) for details on using full-screen writing to enter data.

Setting Communication Preferences

The Communication Preferences category enables you to access screens where you can modify Connection and Network settings. This section provides details about each of these screens.

To open the Communication Preferences screens:

1. Tap the Home icon .
2. Tap the Prefs icon .
3. From the Communication Preferences list, select the name of the Preferences screen you want to view.



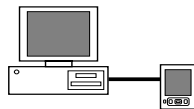
Connection Preferences

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.

For example, a modem connection appears in the list. If you have this modem and the appropriate software, you need only to specify the phone setup (and network connection, if required) to complete the configuration.

NOTE Modem connections require third-party software and accessories, which are sold separately.

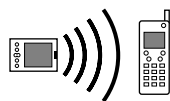
You can also create custom configurations, which include the following:



PC to Cable: A local HotSync connection—the direct connection between your handheld and your desktop computer. Your handheld is connected to the cable, and the cable is attached to a USB port of your desktop computer.



PC to Infrared: A connection between the IR port of your handheld and the infrared device of your computer or laptop.



Modem to Infrared: A connection between the IR port of your handheld and a modem. The modem can be attached to or within a mobile phone or other device containing an IR port. (Some IR phones contain modems.)

Network Preferences

You can use third-party software to connect with Internet service providers (ISPs) or dial-in (remote access) servers, using a mobile phone or optional modem accessory. Your mobile phone must be equipped with an IR port. You also need an ISP account or corporate remote access account and a mobile phone carrier account that supports dial-up connections, or a mobile phone carrier account with high-speed wireless data network services.

NOTE The third-party software, mobile phone and optional modem accessory mentioned above are sold separately.

After you configure both the Connection and Network Preferences, you can establish a PPP (Point-to-Point Protocol) connection with your ISP or dial-in server. You can do this either by using menu commands from the Network Preferences screen or by using a third-party application.

NOTE The Network Preferences settings enable to connect to your ISP or dial-in server with applications that support viewing the transmitted data. Visit the web site www.palm.com for information on third-party applications that take advantage of TCP/IP.

Creating and selecting network service profiles

Use network service profiles to store the configuration settings for your ISP or for a dial-in server. You can create, save, and reuse network service profiles. You can create additional network service profiles from scratch or by duplicating existing profiles and editing information. After you create a new or duplicate profile, you can add and edit settings.

To add a new network service profile:

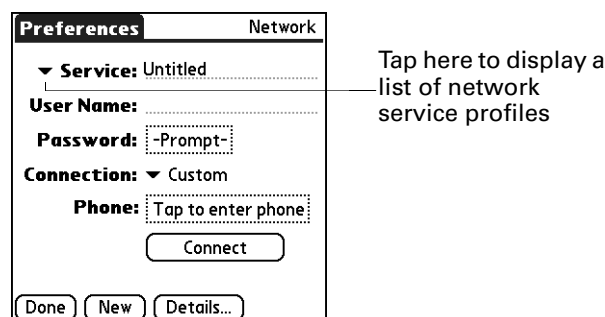
1. From the Communications Preferences list, select Network.
2. Tap New.

An Untitled network service profile appears in the Service pick list.

3. Tap Done.

To select a network service profile:

1. From the Communications Preferences list, select Network.
2. Tap the Service pick list.



3. Select the network service profile you want to use.
4. Tap Done.

To duplicate an existing network service profile:

1. From the Communications Preferences list, select Network.
2. Tap the Service pick list.
3. Select the predefined network service profile you want to duplicate.
4. Tap the Menu icon .
5. Select Service, and then select Duplicate.

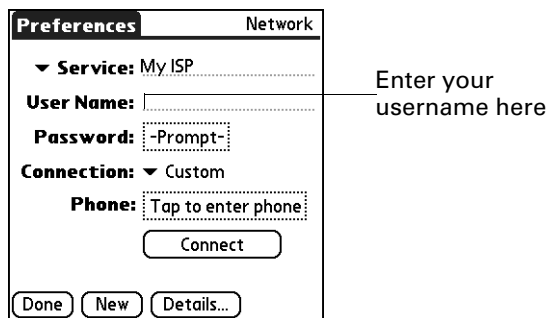
A copy of the network service profile is added to the Service pick list.

Entering a username

The User Name setting identifies the name you use when you log in to your ISP or your dial-in server. Although this field can contain multiple lines of text, only two lines appear onscreen.

To enter a username:

1. From the Communications Preferences list, select Network.
2. Tap the User Name field.
3. Enter your username.



The screenshot shows the 'Network' preferences screen. At the top, there's a 'Preferences' header and a 'Network' title. Below this, the 'Service' is set to 'My ISP'. The 'User Name' field is highlighted with a dashed border and a text box pointing to it with the label 'Enter your username here'. The 'Password' field is also highlighted with a dashed border and labeled '-Prompt-'. The 'Connection' is set to 'Custom'. The 'Phone' field is highlighted with a dashed border and labeled 'Tap to enter phone'. At the bottom, there are three buttons: 'Done', 'New', and 'Details...'. A 'Connect' button is also visible above the 'Done' button.

NOTE Most dial-in servers do not accept spaces in the username.

4. Tap Done.

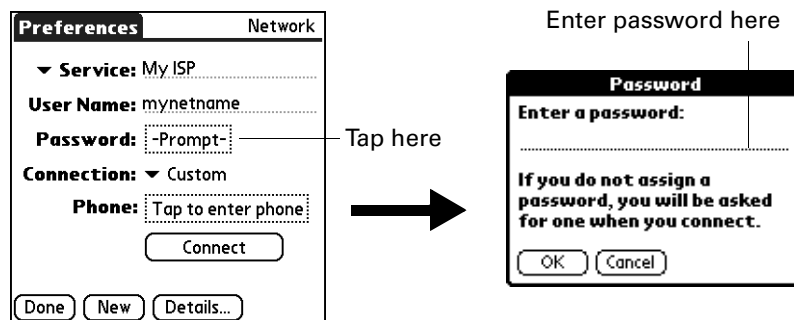
Entering a password

The Password box identifies the password you use to log in to your server or ISP. Your entry in this field determines whether your handheld prompts you to enter a password each time you log in to your network.

- If you do not enter a password, your handheld displays the word “Prompt” in this field and asks you to enter a password during the login procedure. If you are concerned about security, select the Prompt option.
- If you enter a password, your handheld displays the word “Assigned” in this field and does not prompt you to enter a password during the login procedure.

To enter a password:

1. From the Communications Preferences list, select Network.
2. Tap the Password field.
3. Enter the password you use to log in to your server.



4. Tap OK.

The word “Assigned” appears in the Password field.

5. Tap Done.

Selecting a connection

Use the Connection setting to select the method you want to use to connect to your ISP or to a dial-in server. See “[Connection Preferences](#)” earlier in this chapter for information about creating and configuring connection settings.

To select a connection:

1. From the Communications Preferences list, select Network.
2. Tap the Connection pick list.

Tap here to display a list of available connections

3. Select the connection you want to use.
4. Tap Done.

Adding telephone settings

The Phone field enables you to store the telephone number you use to connect with your ISP or dial-in server. You can also define a prefix, disable call waiting, and give special instructions for using a calling card.

To enter your server phone number:

1. From the Communications Preferences list, select Network.
2. Tap the Phone box.
3. Enter the phone number for your ISP or dial-in server.

Enter your ISP phone number here

4. If you need to enter a prefix or to disable call waiting, skip to those procedures. Otherwise, tap OK.
5. Tap Done.

Entering a prefix

A prefix is a number that you dial before the telephone number to access an outside line. For example, many offices require that you first dial "9" to dial a number outside the building.

To enter a prefix:

1. From the Communications Preferences list, select Network.
2. Tap the Phone box.
3. Tap the Dial Prefix check box to select it.



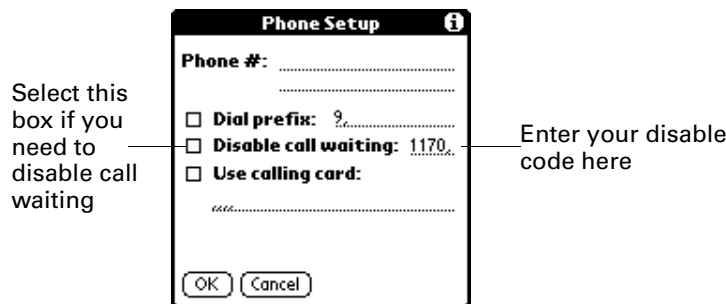
4. Enter the prefix.
5. Tap OK.
6. Tap Done.

Disabling call waiting

Call waiting can cause your session to terminate if you receive a call while you are connected. If your telephone has call waiting, you need to disable this feature before logging in to your ISP or dial-in server.

To disable call waiting:

1. From the Communications Preferences list, select Network.
2. Tap the Phone box.
3. Tap the Disable call waiting check box to select it.



4. Enter the code to disable call waiting on the Disable call waiting line.

Each telephone company assigns a code to disable call waiting. Contact your local telephone company for the code that is appropriate for you.

5. Tap OK.
6. Tap Done.

Using a calling card

The Use calling card field enables you to use your calling card when dialing your ISP or Intranet server. Keep in mind that there is usually a delay before you enter your calling card number. When you define your calling card number, you need to add commas at the beginning to compensate for this delay. Each comma delays transmission of your calling card number for two seconds.

To use a calling card:

1. From the Communications Preferences list, select Network.
2. Tap the Phone box.
3. Tap the Use calling card check box to select it.



4. Enter your calling card number on the Use calling card line.

NOTE The Phone Setup dialog box works correctly for AT&T and Sprint long-distance services. However, because MCI works differently, MCI customers need to enter the calling card number in the Phone # field and the phone number in the Use calling card field.

TIP It's a good idea to add at least three commas before your calling card number to compensate for the cue delay.

5. Tap OK.
6. Tap Done.

Connecting to your service

After you set your Connection and Network Preferences, establishing a connection to your ISP or your company's network (dial-in server) is easy.

NOTE If you are connecting to an ISP, you need a third-party application, such as a web browser or news reader, to take advantage of this connection. For information about third-party applications that support TCP/IP, check the web site www.palm.com.

To establish a connection:

1. From the Communications Preferences list, select Network.
2. Tap Connect to dial the current service and display the Service Connection Progress messages.
3. (Optional) From the Service Connection Progress dialog box, tap the box that displays the service name, select another service, and then tap Done.
4. Tap Done.

To close a connection:

1. From the Communications Preferences list, select Network.
2. Tap Disconnect to terminate the connection between your handheld and your service.
3. Tap Done.

Adding detailed information to a network service profile

If you are using one of the predefined network service profiles, you probably need to enter only your username, password, and telephone number. If you are creating a new network service profile, you may need to provide additional information to your ISP or dial-in server. You use the Details dialog box to add more information to a selected network service profile.

To add connection details:

1. From the Communications Preferences list, select Network.
2. Tap Details.

**Idle timeout**

The Idle timeout 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.

To set the Idle timeout:

1. Tap the Idle timeout pick list and select one of the following options:

1 minute	Waits one minute for you to open another application before it drops 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).

2. Tap OK.

Defining primary and secondary DNS

The domain name system (DNS) is a mechanism in the Internet for translating the names of host computers into IP addresses. When you enter a DNS number (or IP address), you are identifying a specific server that handles the translation services.

Each IP address has four sections, separated by periods. In the Details dialog box, you enter each section separately. Each section of an IP address is made up of a number from 0 to 255; numbers are the only allowable characters in this field.

Ask your ISP or system administrator for the correct primary or secondary DNS IP address.

Many systems do not require that you enter a DNS IP address. If you are not sure, leave the DNS field blank.

To enter a primary and secondary DNS:

1. Tap the Query DNS check box to deselect it.
2. Tap the space to the left of the first period in the Primary DNS field, and then enter the first section of the IP address.

Each section must be a number from 0 to 255.

3. Repeat step 2 for the second, third, and last sections of the Primary DNS field.
4. Repeat steps 2 and 3 for the Secondary DNS field.
5. Tap OK.

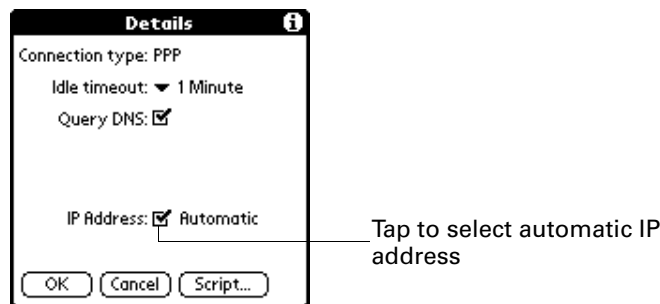
IP address

Everyone who logs in to the Internet needs to have a unique identifier (an IP address), whether permanent or temporary. Some networks dynamically assign a temporary IP address when clients log in. You can use the IP Address field to indicate whether your network provides automatic (dynamic) temporary IP addressing.

If your IP address is permanently assigned, you need to get that information from your system administrator. If you are not sure, select Automatic.

To identify dynamic IP addressing:

- Tap the IP Address check box to select it.



To enter a permanent IP address:

1. Tap the IP Address check box to deselect it and to display a permanent IP address field below the check box.
2. Tap the space to the left of the first period, and then enter the first section of the IP address.

Each section must be a number from 0 to 255.

3. Tap and enter the remaining sections of the IP address.
4. Tap OK.

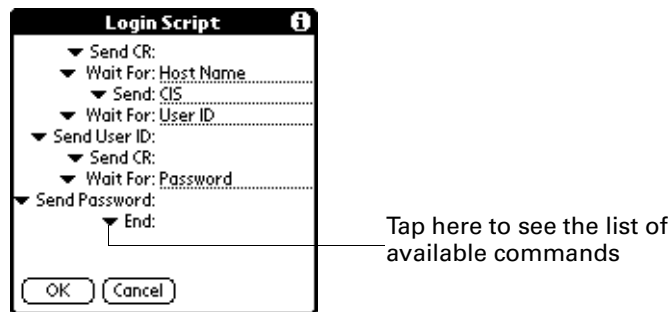
Login scripts

A login script is a series of commands that automates logging in to a network server—for example, your corporate network or your ISP. A login script is associated with a specific network service profile created in Network Preferences.

A login script is something that you are likely to receive from your system administrator if your company has a system in which you log in to the corporate servers from your handheld using a modem or network connection. The script is generally prepared by the system administrator and distributed to users who need it. It automates the events that must take place to establish a connection between your handheld and the corporate servers.

You can create login scripts in two ways:

- In a text editor on your desktop computer, in which you create a file with the extension PNC, which you then install on your handheld by using Palm™ Quick Install. (This method is not available to Mac computer users.)
- In the Login Script dialog box on your handheld, accessed from the Details dialog box in Network Preferences.



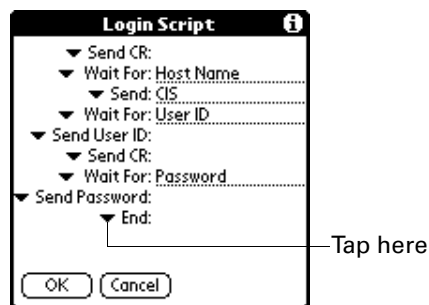
NOTE You can also use non-ASCII and literal characters in your login script.

Creating a login script on your handheld

You can create login scripts by selecting commands from the Command pick list in the Login Script dialog box. Some commands, such as Send, require you to supply additional information. Those commands have a parameter field so that you can add the necessary data.

To create a login script:

1. Tap Script.
2. Tap the End pick list.



3. Select the command you want from the Command list. If the command requires additional information, a field appears to the right of it for you to enter the information. The following commands are available:

Wait For	Tells your handheld to wait for specific characters from the TCP/IP server before executing the next command.
Wait For Prompt	Detects a challenge-response prompt coming from the server and then displays the dynamically generated challenge value. You then enter the challenge value into your token card, which in turn generates a response value for you to enter on your handheld. This command takes two arguments, separated by a vertical bar () on the input line.
Send	Transmits specific characters to the TCP/IP server to which you are connecting.
Send CR	Transmits a carriage return or line feed (LF) character to the TCP/IP server to which you are connecting.
Send User ID	Transmits the user ID information entered in the User ID field of the Network Preferences screen.
Send Password	Transmits the password entered in the Password field of the Network Preferences screen. If you did not enter a password, this command prompts you to enter one. The Password command is usually followed by a Send CR command.
Delay	Tells your handheld to wait a specific number of seconds before executing the next command in the login script.
Get IP	Reads an IP address and uses it as the IP address for your handheld. This command is used with SLIP connections.
Prompt	Opens a dialog box and prompts you to enter certain text (for example, a password or a security code).
End	Identifies the last line in the login script.

4. Repeat steps 2 and 3 until the login script is complete.
5. Tap OK.

Plug-in applications

You can create plug-in applications containing script commands that extend the functionality of the built-in script commands. A plug-in application is a standard PRC application that you install on your handheld just like any other application. After you install the plug-in application, you can use the new script commands in a login script.

Plug-in applications have the following characteristics:

- Written in C language
- Compiled into a device executable
- Called properly from a login script
- Able to return control to a login script after it terminates
- Created using a development environment that supports Palm OS® software, such as Metrowerks CodeWarrior for Palm™ Platform.

For additional information on creating plug-in applications, send e-mail to Palm Developer Support at devsupp@palmsource.com.

Deleting a network service profile

There is only one way to delete a network service profile: Use the Delete command from the Service menu.

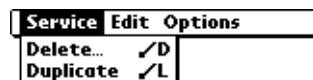
To delete a network service profile:

1. From the Communications Preferences list, select Network.
2. Tap the Service pick list.
3. Select the network service profile you want to delete.
4. Tap the Menu icon .
5. Select Delete from the Service menu.
6. Tap OK.
7. Tap Done.

Network Preferences menu commands

The Network Preferences screen includes menu commands to make it fast and easy to create and edit network service profiles. TCP/IP application menus are shown here for your reference. See “Using menus” in [Chapter 4](#) for more information about choosing menu commands.

Service menu



Options menu



TCP/IP troubleshooting

If you have problems establishing a network connection using TCP/IP, check the troubleshooting tips in this section and try the suggestions listed.

Displaying expanded Service Connection Progress messages

It's helpful to identify at what point in the login procedure the connection fails. An easy way to do this is to display the expanded Service Connection Progress messages. These messages describe the current stage of the login procedure. Press the lower half of the scroll button at any point during login to display these messages.

Viewing the Network Log

If viewing the expanded Service Connection Progress messages does not give you enough information to find out why you cannot connect to your ISP or dial-in server, take a look at the Network Log. The Network Log lists all of the communication that occurs between your modem and your dial-in server during the login procedure. The information in the Network Log can help your ISP or your system administrator pinpoint where the login procedure communication fails and why.

To view the Network Log:

1. From the Network Preferences screen, tap the Menu icon .
2. Select Options, and then select View Log.
3. Tap the up and down arrows of the scroll bar to see the entire Network Log.
4. Tap Done.

Adding a DNS number

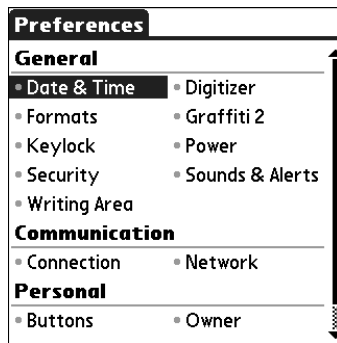
If your ISP or dial-in server requires a DNS number and you did not enter that information in the Network Preferences screen, it will appear that you successfully logged in to your network. When you try to use an application or look up information, however, the connection fails. If this occurs, try adding a DNS IP address. Ask your ISP or your system administrator for the correct primary and secondary DNS IP address.

Setting Personal Preferences

The Personal Preferences category enables you to access screens where you can customize the buttons, colors, owner information, and Graffiti 2 ShortCuts on your handheld. This section provides details about each of these screens.

To open the Personal Preferences screens:

1. Tap the Home icon .
2. Tap the Prefs icon .
3. From the Personal Preferences list, select the name of the Preferences screen you want to view.



Buttons Preferences

The Buttons Preferences screen enables you to assign a frequently used application to the Address Book button, Date Book button, or the Star icon.

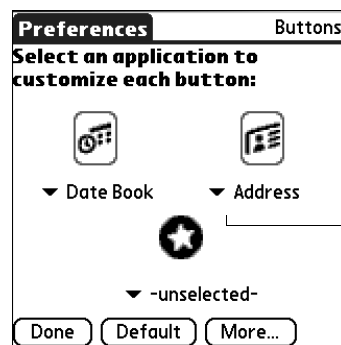
HotSync operation is assigned to the Star icon by default. But if you use Memo Pad more frequently, you can assign Memo Pad to the icon so that you don't have to scroll through the Home screen whenever you want to use Memo Pad.

Any changes you make in the Buttons Preferences screen become effective immediately; you do not have to change to a different screen or application.

If you assign a different application to a button, you can still access the original application using the Home screen.

To change the Buttons Preferences:

1. From the Personal Preferences list, select Buttons.
2. Tap the pick list next to the button you want to reassign.



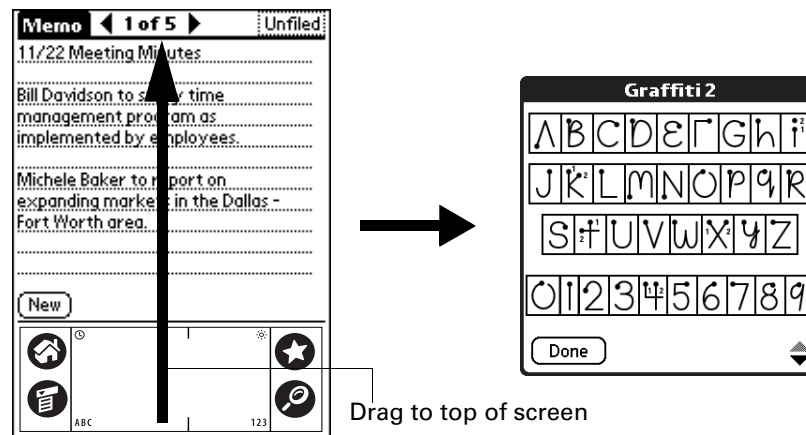
3. Select the application that you want to assign to the button.

To restore all the buttons to their factory settings, tap Default.

4. Tap Done.

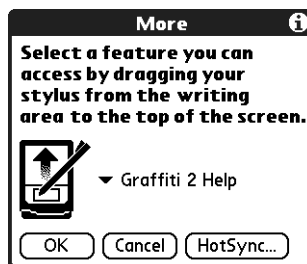
Pen Preferences

The Buttons Preferences screen enables you to change the assignment of the full-screen pen stroke. By default, the full-screen pen stroke activates Graffiti 2 Help.



To change the Pen Preferences:

1. From the Personal Preferences list, select Buttons.
2. Tap More.



3. Tap the pick list and select one of the following settings for the full-screen pen stroke:

Contrast	Opens the Contrast control dialog box.
Keyboard	Opens the onscreen keyboard for entering text characters.
Graffiti 2 Help	Opens a series of screens that show the Graffiti 2 character set.
Turn Off & Lock	Turns off and locks the handheld. You must assign a password to lock the handheld. When it is locked, you need to enter the password to use your handheld.
Beam Data	Beams the current record to another device with an IR port.

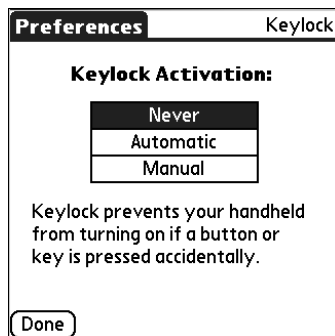
4. Tap OK.
5. Tap Done.

Keylock Preferences

Use the Keylock Preferences screen to prevent your handheld from turning on if a button or key is accidentally pressed. This feature helps conserve the charge in your handheld.

To change Keylock settings:

1. From the General Preferences list, select Keylock.
2. Select the setting you want to use for the Keylock feature.



Never	Keylock is never activated.
Automatic	Keylock is activated automatically when your handheld is powered off. This includes when you turn your handheld off and when it goes to sleep.
Press and hold	Keylock is activated when you press and hold the power button for two seconds. The system sounds to confirm that Keylock is activated.

Owner Preferences

The Owner Preferences screen enables you to update the name, company name, phone number, or any other information that you want to associate with your handheld. This information could help someone contact you if you ever lose your handheld and there is sufficient battery power to turn it on.

By default the Owner Preferences screen contains the information that you supplied when you installed the Palm Desktop software and set up your handheld.

If you use the Security Preferences screen to turn off and lock your handheld with a password, information that you entered in the Owner Preferences screen appears the next time you turn on your handheld. See [“Security Preferences”](#) earlier in this chapter for additional information.

To customize the Owner Preferences:

1. From the Personal Preferences list, select Owner.
2. Modify or enter the text that you want to associate with your handheld.

If you enter more text than can fit on one screen, a scroll bar automatically appears on the right side of the screen.

Preferences Owner

This handheld computer is owned by:

Midyne Spear
Creative Spearit
Bonny Doon, CA

831-555-1212

If found, please contact me:

Done

If you assign a password with the Security Preferences, the information on the Owner Preferences screen cannot be changed. In this case an Unlock button appears at the bottom of the screen.

3. Tap Done.

To unlock the Owner Preferences screen:

1. From the Personal Preferences list, select Owner.
2. Tap Unlock.
3. Enter the password that you defined in the Security Preferences.
4. Tap OK.
5. Tap Done.

ShortCuts Preferences

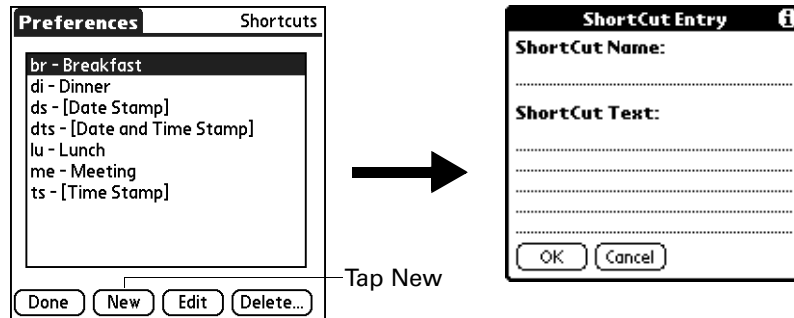
The ShortCuts Preferences screen enables you to define abbreviations for entering text with Graffiti 2 strokes. This section describes how to create, edit, and delete a ShortCut.

Creating a ShortCut

You can create a ShortCut for any words, letters, or numbers. All ShortCuts you create appear in the list in the ShortCut Preferences screen. All the ShortCuts are available in any of your handheld applications and are backed up on your computer when you perform a HotSync operation.

To create a ShortCut:

1. From the Personal Preferences list, select Shortcuts.
2. Tap New.
3. On the ShortCut name line, enter the letters you want to use to activate the ShortCut.

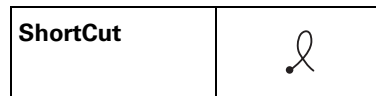


4. Tap the ShortCut Text area, and enter the text that you want to appear when you write the ShortCut characters.

TIP You may want to add a space character after the last word in your ShortCut text. This way, a space automatically follows the ShortCut text.

5. Tap OK.

To use a ShortCut, draw the ShortCut stroke followed by the ShortCut characters. When you draw the ShortCut stroke, the ShortCut symbol appears at the insertion point to show that you are in ShortCut mode.



6. Tap Done.

Editing a ShortCut

After you create a ShortCut, you can modify it at any time.

To edit a ShortCut:

1. From the Personal Preferences list, select Shortcuts.
2. Select the ShortCut you want to edit.
3. Tap Edit.
4. Make the changes you want.
5. Tap OK.
6. Tap Done.

Maintaining Your Handheld

This chapter provides information on the following:

- Caring for your handheld
- Prolonging battery life
- Resetting your handheld

Caring for your handheld

Your handheld is designed to be rugged and reliable and to provide years of trouble-free service. Observe the following general tips when using your handheld:

- Take care not to scratch the screen of your handheld. Keep the screen clean. When working with your handheld, use the supplied stylus or a plastic-tipped pen intended for use with a touch-sensitive screen. Never use an actual pen or pencil or other sharp object on the surface of the handheld screen.
- Your handheld is not waterproof and should not be exposed to rain or moisture. Under extreme conditions, water may enter the circuitry through the front panel buttons. In general, treat your handheld as you would a pocket calculator or other small electronic instrument.
- Take care not to drop your handheld or subject it to any strong impact. Do not carry your handheld in your back pocket; if you sit on it, you may damage it.
- Protect your handheld from temperature extremes. For example, do not leave your handheld on the dashboard of a car on a hot day or on a day when temperatures are below freezing, and keep it away from heaters and other heat sources.
- Do not store or use your handheld in any location that is damp, wet, or extremely dusty.
- Use a soft, damp cloth to clean your handheld. If the surface of the handheld screen becomes soiled, clean it with a soft cloth moistened with a diluted window-cleaning solution.

Prolonging battery life

Note the following considerations for the battery in your handheld:

- Under normal conditions your handheld battery should remain charged when you connect it to the cable every day. You can conserve battery life by changing the Auto-off setting that automatically turns the handheld off after a period of inactivity. See [“Auto-off after”](#) in [Chapter 14](#) for more information.
- If the battery becomes low in the course of normal use, an alert appears on the handheld screen, describing the low battery condition. If this alert appears, perform a HotSync® operation to back up your data; then leave your handheld connected to the cable to recharge the unit. This helps prevent accidental data loss.
- If the battery drains to the point that your handheld does not operate, it stores your data safely for about a week. In this case there is enough residual energy in the battery to store the data, but not enough to turn on your handheld. If your handheld does not turn on when you press the power button, you should recharge the unit immediately.
- If your battery drains and you have the unit in an uncharged state for an extended period of time, you can lose all your stored data.
- There are no serviceable parts inside your handheld, so do not attempt to open the unit.
- If you ever dispose of your handheld, please dispose of it without damaging the environment. Take your handheld to your nearest environmental recycling center.

Resetting your handheld

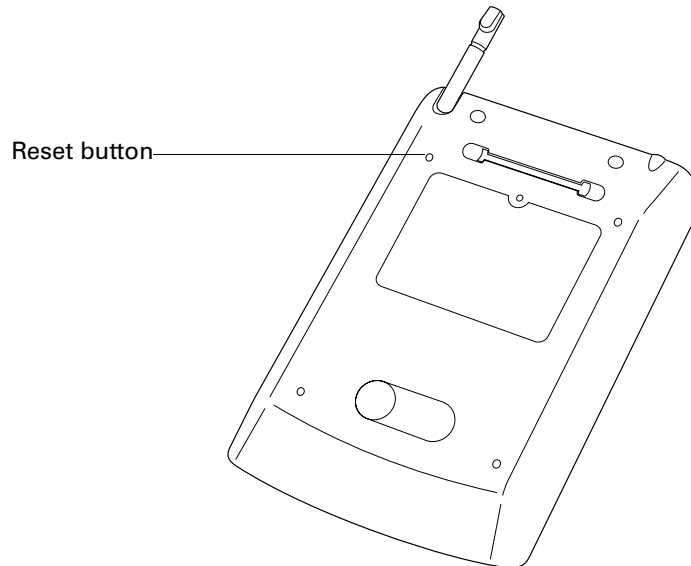
Under normal circumstances you will not have to use the reset button. On rare occasions, however, your handheld may no longer respond to buttons or to the screen. In this case you need to perform a reset to get your handheld running again.

Performing a soft reset

A soft reset tells your handheld to stop what it's doing and start over again. All records and entries stored in your handheld are retained with a soft reset. After a soft reset, the Preferences screen appears and the Date and Time option is highlighted so you can reset the date and time if needed.

To perform a soft reset:

- Use the tip of an unfolded paper clip (or similar object *without* a sharp tip), to gently press the reset button inside the hole on the back panel of your handheld.



Performing a hard reset

With a hard reset, all records and entries stored in your handheld are erased. Never perform a hard reset unless a soft reset does not solve your problem.

NOTE You can restore any data previously synchronized with your computer during the next HotSync operation.

To perform a hard reset:

1. Press and hold the power button on the front panel of the handheld.
2. While holding the power button, use the tip of an unfolded paper clip (or similar object *without* a sharp tip) to gently press and release the reset button.
3. Wait for the Palm Powered™ logo to appear; then release the power button.
4. When a message appears on the handheld screen, warning that you are about to erase all the data stored on your handheld, press any other button to perform a soft reset.

NOTE With a hard reset, the current date and time are retained. Formats Preferences and other settings are restored to their factory default settings.

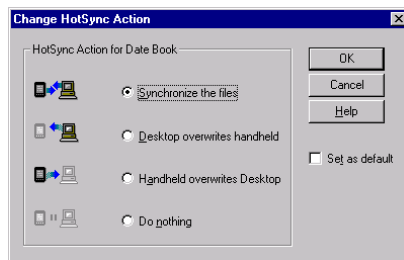
To restore your data from a Windows computer after a hard reset:

1. Click the HotSync icon  in the Windows system tray (lower-right corner of the taskbar).

You can also click the HotSync command on the Palm™ Desktop software menu bar.

2. From the HotSync Manager menu, select Custom.
3. Select the appropriate username from the list.
4. Select an application in the Conduit list.
5. Click Change.
6. Select Desktop overwrites handheld for each conduit.

Changing the HotSync setting from the default affects only the *next* HotSync operation. Thereafter, the HotSync Actions revert to their default settings. To use a new setting on an ongoing basis, select the Set as default box. Thereafter, whatever you selected as the default setting is used when you click the Default button in the Custom dialog box.



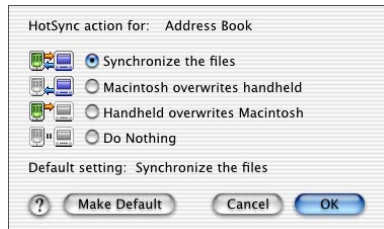
7. Click OK.
8. Repeat steps 4 through 6 to change conduit settings for other applications.
9. Click Done to activate your settings.
10. Perform a HotSync operation.

To restore your data from a Mac computer after a hard reset:

1. Double-click the HotSync Manager in the Palm folder.
2. From the HotSync menu, select Conduit Settings.
3. From the Users pop-up menu, select the appropriate username.
4. Select an application from the list.
5. Click Conduit Settings.

6. Click Macintosh overwrites handheld for each conduit.

Changing the HotSync setting from the default affects only the *next* HotSync operation. Thereafter, the HotSync Actions revert to their default settings. To use a new setting on an ongoing basis, click Make Default. Thereafter, whatever you selected as the default setting is used for HotSync operations.



7. Click OK.
8. Repeat steps 4 through 6 to change conduit settings for other applications.
9. Close the Conduit Settings window.
10. Perform a HotSync operation.

Frequently Asked Questions

There are several references available to help you solve any problems with your handheld. Review the frequently asked questions in this appendix and refer to the following resources:

- The readme file located in the folder where you installed the Palm™ Desktop software on your Windows computer or on your installation CD for Mac users
- The Palm Desktop online Help
- The *Palm Desktop Software for the Macintosh User's Guide*, located in the Documentation folder on your installation CD
- The *Palm Knowledge Library*, accessible at www.palm.com in the Support section
- The most recent Palm™ Zire™ 21 handheld HelpNotes on your regional web site

If you are still having problems, contact Technical Support or go to www.palm.com/support/zire21.

NOTE Palm works with developers of third-party add-on applications to ensure the compatibility of these applications with your new Palm™ handheld. Some third-party applications, however, may not have been upgraded to be compatible with your new Palm handheld. If you suspect that a third-party application is adversely affecting the operation of your handheld, contact the developer of the application.

Software installation problems

Problem	Solution
The installation menu did not appear when I inserted the Desktop Software CD-ROM into my Windows computer.	Try the following: 1. From the Windows desktop, click Start. 2. Select Run. 3. Click Browse. 4. Locate your CD-ROM drive and select the Autorun file. 5. Click Open. 6. Click OK.

I cannot install Palm Desktop software on my Windows computer.

Try the following:

1. Disable any virus-scanning software on your computer.
2. Close any open applications.
3. Make sure your computer has at least 60MB of disk space available.
4. Delete all temporary files.
5. Run ScanDisk (or another disk verification tool) on your computer.
6. Uninstall and then reinstall Palm Desktop software.

I cannot install Palm Desktop software on my Mac computer.

Try the following:

1. Disable any virus-scanning software on your computer.
2. Quit any open applications.
3. Make sure your computer has at least 60MB of disk space available.
4. Uninstall and then reinstall Palm Desktop software.

My files didn't install during a HotSync® operation.

If files do not install after you perform a HotSync operation, the file type was not recognized. Try launching the associated application from your handheld and then performing another HotSync operation. If the files still remain in the list, they are not associated with an application on your handheld and cannot be installed.

I can't add more files to the Palm™ Quick Install list.

Make sure the dialog box that confirms where the files will be installed is closed. You cannot add more files to the list when the confirmation dialog box is open. For details, see [“Installing applications and files on a Windows computer”](#) in [Chapter 4](#).

Operating problems

Problem

I don't see anything on my handheld's screen.

Solution

Try each of these in turn:

- Press an application button to ensure that your handheld is turned on.
- Tap the Contrast icon  in the upper-right corner of the input area. If the Contrast dialog box appears, adjust the contrast by holding down the up scroll button for a few seconds. If this doesn't work, hold the down scroll button for a few seconds.

I don't see anything on my handheld's screen (continued).

- If your handheld was exposed to cold, make sure it is at room temperature.
- Charge your handheld.
- Perform a soft reset. If your handheld still doesn't turn on, perform a hard reset. See ["Resetting your handheld"](#) in [Appendix A](#).

IMPORTANT With a hard reset, all records and entries stored in your handheld are erased. Never perform a hard reset unless a soft reset does not solve your problem. You can restore any data previously synchronized with your computer during the next HotSync operation.

I get a warning message telling me my handheld memory is full.

Try each of these in turn:

- Purge records from Date Book and To Do List. This deletes To Do List items and past Date Book events from the memory of your handheld. See ["Purging records"](#) in [Chapter 4](#). You must perform a HotSync operation to recover the memory.
- Delete unused memos and records. If necessary, you can save these records. See ["Deleting records"](#) in [Chapter 4](#). You must perform a HotSync operation to recover the memory.
- If you have installed additional applications on your handheld, remove them to recover memory. See ["Removing applications"](#) in [Chapter 4](#).

My handheld keeps turning itself off.

Your handheld is designed to turn itself off after a period of inactivity. This period can be set at 30 seconds or at one, two, or three minutes. Check the Auto-off after setting on the Power Preferences screen. See ["Power Preferences"](#) in [Chapter 14](#).

My handheld is not making any sounds.

Check the System, Alarm, and Game Sound settings. See ["Sounds & Alerts Preferences"](#) in [Chapter 14](#).

My handheld has frozen.

- If a network connection was improperly terminated, your handheld may appear to be frozen for up to 30 seconds. If it is still frozen after 30 seconds, perform a soft reset. See ["Resetting your handheld"](#) in [Appendix A](#).

Tapping and writing problems

Problem

When I tap the buttons or screen icons, my handheld activates the wrong feature.

When I tap the Menu icon , nothing happens.

I can't get my handheld to recognize my handwriting.

Solution

Calibrate the screen. See [“Digitizer Preferences”](#) in [Chapter 14](#).

Not all applications or screens have menus. Try changing to a different application.

Try each of these in turn:

- For your handheld to recognize handwriting input with the stylus, you need to use Graffiti® 2 writing. See [“Using Graffiti 2 writing to enter data”](#) in [Chapter 3](#).
- Make the Graffiti 2 character strokes in the input area, not on the display part of the screen. If you want to write on the display part of the screen you must turn on and activate Writing Area Preferences. See [“Full-screen writing area”](#) in [Chapter 3](#).
- Write Graffiti 2 strokes for lowercase letters in the left side, strokes for capital letters in the middle, and strokes for numbers in the right side of the input area.
- Make sure that Graffiti 2 is not in Punctuation Shift mode. See [“Symbols and other special characters”](#) in [Chapter 3](#).
- See [“Graffiti 2 tips”](#) in [Chapter 3](#) for tips on increasing your accuracy when you write Graffiti 2 characters.

Application problems

Problem

I tapped the Today button, but it does not show the correct date.

I know I entered some records, but they do not appear in the application.

Solution

Your handheld is not set to the current date. Make sure the Set Date box on the Date and Time Preferences screen displays the current date. See [“Date & Time Preferences”](#) in [Chapter 14](#) for more information.

Try each of these in turn:

- Check the Categories pick list (upper-right corner). Select All to display all the records for the application.
- Check Security and confirm that Private Records is set to Show private records.
- In To Do List, tap Show and see if Show Only Due Items is selected.

I'm having problems listing memos or notes the way I want to see them.

Try each of these in turn:

- If you cannot manually arrange the order of memos or notes in the list screen, select Preferences from the Options menu and make sure that Sort by is set to Manual.
- If you choose to view your memos or notes alphabetically on Palm Desktop software and then perform a HotSync operation, the memos on your handheld still appear in the order defined in the Preferences setting. In other words, the sort settings you use with Palm Desktop software *are not* transferred to your handheld.

I created an event in Date Book, but it doesn't appear in the Week View.

In the Week View, you cannot select overlapping events that have the same start time. If you have two or more events with the same start time, choose the Day View to see the overlapping events.

My vCard or vCal e-mail attachment isn't forwarding correctly.

Palm Desktop software provides several features that interact with e-mail client software on a Windows computer. For these features to work correctly, the e-mail client software must be properly configured. Follow these steps to check the configuration:

1. Click the Windows Start menu, and then select Settings.
2. Select Control Panel.
3. Select Internet Options, and then click the Programs tab.
4. Make sure that the E-mail field is set to the correct e-mail client software.
5. Click OK.
6. Start the e-mail client software and make sure it is configured as the default MAPI client. Consult the documentation for your desktop e-mail application for more information.

The current date and time are incorrect.

The current date and time are tied to the Location setting. If you change the date and time without changing the Location setting, the current date and time may appear incorrect. See ["Date & Time Preferences"](#) in [Chapter 14](#) for information on setting the current location, date, and time.

I want to delete all of the data from my handheld.

Perform a hard reset. See ["Performing a hard reset"](#) in [Appendix A](#) for more information.

HotSync problems

Problem

I cannot perform a HotSync operation. What should I check to make sure I'm doing it correctly?

Solution

- Make sure the HotSync cable is connected securely.

On a Windows computer try these steps:

1. Check the Windows system tray to make sure the HotSync Manager is running. If it is not, click Start on the Windows taskbar, and then select Programs. Navigate to the Palm Desktop software program group, and select HotSync Manager. You should also see [“Selecting HotSync setup options”](#) in [Chapter 13](#) for instructions on selecting the correct HotSync Manager settings.
2. Make sure you selected Local USB from the HotSync Manager menu.

On a Mac computer try these steps:

1. Make sure HotSync Manager is enabled. If it is not, double-click the HotSync Manager icon in the Palm folder and enable HotSync Manager on the HotSync Controls tab.
2. Disconnect the cable from your computer, and then reconnect the cable and restart your computer.

I did a HotSync operation, but one of my applications did not synchronize.

- On a Windows computer, click the HotSync Manager and select Custom. Check that the correct conduit is active.
- On a Mac computer, double-click the HotSync Manager icon. From the HotSync menu, select Conduit Settings. Select your username from the User pop-up menu, and check that the correct conduit is active.

I am using Outlook as my PIM, but I cannot do a HotSync operation.

Try each of these in turn:

- Click the HotSync Manager and select Custom. Check that the correct conduit is active.
- Check that the correct conduit is installed. Reinstall the HotSync Manager and make sure that the correct conduit is selected.
- Reinstall Palm Desktop software and select the option to synchronize with Microsoft Outlook.

I cannot launch the HotSync Manager.

- Make a backup copy of your Palm Desktop data, and then reinstall Palm Desktop software.

I tried to do a local HotSync operation, but it did not complete successfully.

Try each of these in turn:

- Make sure your handheld is connected to the cable correctly.
- Check the connection between the HotSync cable and the USB port on your computer.
- Make sure the username you selected in Palm Desktop software matches the username assigned to your handheld.
- Make sure the date on your computer matches the date on your handheld.
- Read the HotSync Log for the user account for which you are performing a HotSync operation.

On a Windows computer, try each step in turn:

- Make sure that HotSync Manager is running. If it is running, close it and restart it.
- Make sure you selected Local USB from the HotSync Manager menu.

On a Mac computer:

- Make sure that HotSync Manager is enabled on the HotSync Controls tab in the HotSync Software Setup window.

Check the following on your computer:

- Make sure that your computer is turned on and that it does not shut down automatically as part of an energy-saving feature.

I can't perform an IR HotSync operation.

Try each of these in turn:

- On a computer running Windows 98, be sure that the HotSync Manager is running, that Infrared is selected on the HotSync Manager menu, and that the Serial Port for local operations is set to the simulated port for infrared communication. See [“Conducting IR HotSync operations”](#) in [Chapter 13](#) for details.
- On a computer running Windows 2000/ME/XP, select IR in the HotSync Manager. See [“Preparing your computer for infrared communication”](#) in [Chapter 13](#) for details.

- | | |
|---|---|
| <p>I can't perform an IR HotSync operation (continued).</p> | <ul style="list-style-type: none"> ■ On a Mac computer, make sure the infrared communications extensions have been installed in the Extensions folder inside the System folder. Next, open the HotSync Software Setup window, and be sure that HotSync Manager is enabled and that the Local Setup Port is set to Infrared Port. See "Conducting IR HotSync operations" in Chapter 13 for more information. ■ On your handheld, be sure the HotSync application is set to Local, with the option IR to PC/Handheld. ■ Be sure the IR port of your handheld is aligned directly opposite to, and within a few inches of, the infrared device of your computer. ■ IR HotSync operations do not work after you receive a low battery warning. Check the battery power of your handheld. Recharge the internal battery. |
| <p>My handheld appears to freeze when I place it near my computer.</p> | <p>Move your handheld away from the computer's infrared port.</p> |
| <p>When I tap the HotSync icon in the Home screen, nothing happens on Palm Desktop software, and my handheld times out.</p> | <p>Try each of these in turn:</p> <ul style="list-style-type: none"> ■ Turn on your handheld, and tap the Home icon . Select the HotSync icon , and then tap Local. ■ Make a copy of your Palm folder. Uninstall and then reinstall Palm Desktop software. |
| <p>When I perform a HotSync operation, my information does not transfer to Palm Desktop software.</p> | <p>Try each of these in turn:</p> <ul style="list-style-type: none"> ■ If you have performed a HotSync operation successfully but you cannot find the data from your handheld on Palm Desktop software, check to see that you have the correct username selected for viewing data. ■ On a Windows computer, click the HotSync Manager and select Custom. Check that all conduits are set to synchronize files. ■ On a Mac computer, double-click the HotSync Manager icon. From the HotSync menu, select Conduit Settings. Select your username from the User pop-up menu, and check that the correct conduit is active. |

My handheld displays the message “Waiting for sender” when it’s near my computer’s infrared port.

Try each of these in turn:

- Your computer’s infrared port may be set to search automatically for the presence of other infrared devices. Consult the documentation for your operating system for information about turning off this option.
- In some cases simply moving your handheld away from the computer’s infrared port solves the problem.

When the HotSync cable is connected to my handheld, the battery icon appears.

When the HotSync cable is connected to your handheld, the battery icon will appear because the cable maintains the charge in your handheld.

I want to synchronize my computer with more than one handheld.

Try each of these in turn:

- If the computer running Palm Desktop software synchronizes with more than one handheld, each handheld must have a unique name. Assign a username to your handheld the first time you perform a HotSync operation.
- Be aware that synchronizing more than one handheld with the same username causes unpredictable results and, potentially, loss of your personal information.

Beaming problems

Problem

I cannot beam data to another device with an IR port.

Solution

Try each of these in turn:

- If you are beaming to another Palm handheld, confirm that your handheld and the other handheld are between ten centimeters (approximately 4”) and one meter (approximately 39”) apart and that the path between the two handhelds is clear of obstacles. Beaming distance to other devices with an IR port may be different.
- Move your handheld closer to the receiving device.
- Make sure the receiving device has enabled beam receive.

When someone beams data to my handheld, I get a message telling me it is out of memory.

Try each of these in turn:

- Your handheld requires at least twice the amount of memory available as the data you are receiving. For example, if you are receiving a 30KB application, you must have at least 60KB free.
- Perform a soft reset. See [“Performing a soft reset”](#) in [Appendix A](#) for more information.

Recharging problems

Problem

When I connect my handheld to the cable, it does not charge.

Solution

Try each of these in turn:

- Confirm that your handheld is firmly connected to the cable.
- Confirm that your recharger is plugged into an AC outlet that has power.
- With your handheld connected to the cable, press the power button and tap the Home icon . Confirm that there is a lightening bolt on the battery icon at the top of the screen.
- Charge your handheld for *at least* three full hours.

Password problems

Problem

I forgot the password, and my handheld is not locked.

Solution

- First, use the password hint to try to remember the password. If this doesn't help or if you do not have a password hint, you can use Security to delete the password, but your handheld deletes all entries marked as private. However, if you perform a HotSync operation *before* you delete the password, the HotSync process backs up all entries, whether or not they are marked private. Then you can follow these steps to restore your private entries:
 - a. Use the Palm Desktop software and the cable or infrared communication to synchronize your data.
 - b. Tap Forgotten Password in Security to remove the password and delete all private records.
 - c. Perform a HotSync operation to synchronize your data and restore the private records by transferring them from your computer to your handheld.

I forgot the password, and my handheld is locked.

- First, use the password hint to try to remember the password. If this doesn't help or if you do not have a password hint, you must perform a hard reset to continue using your handheld. See [“Performing a hard reset”](#) in [Appendix A](#) for more information.

Technical support

If, after reviewing the sources listed at the beginning of this appendix, you cannot solve your problem, go to www.palm.com/support/zire21 or send an e-mail to your regional Technical Support office.

Before requesting support, please experiment a bit to reproduce and isolate the problem. When you do contact support, please provide the following information:

- The name and version of the operating system you are using
- The actual error message or state you are experiencing
- The steps you take to reproduce the problem
- The version of handheld software you are using and available memory

To find version and memory information:

1. Tap the Home icon .
2. Tap the Menu icon .
3. Select Info from the App menu.

NOTE Palm works with developers of third-party add-on applications to ensure the compatibility of these applications with your new Palm handheld. Some third-party applications, however, may not have been upgraded to be compatible with your new Palm handheld. If you suspect that a third-party application is adversely affecting the operation of your handheld, contact the developer of the application.

4. Tap Version to see version numbers, and tap Size to see the amount of free memory in kilobytes.

Product Regulatory Information

FCC Statement

This device complies with part 15 of the FCC rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

NOTE This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of the FCC rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

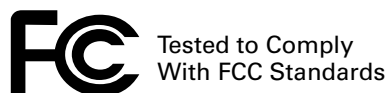
The use of shielded I/O cables is required when connecting this equipment to any and all optional peripheral or host devices. Failure to do so may violate FCC rules.

CAUTION Changes or modifications not covered in this manual must be approved in writing by the manufacturer's Regulatory Engineering Department. Changes or modifications made without written approval may void the user's authority to operate this equipment.

Responsible Party:

Palm Solutions Group
400 N. McCarthy Boulevard
Milpitas, California 95035
United States of America
(408) 503-7500

Zire™ Product Family



FOR HOME OR OFFICE USE

Canadian ICES-003 Statement

This Class B digital apparatus meets all requirements of the Canadian Interference-Causing Equipment Regulations.

Cet appareil numérique de la classe B respecte toutes les exigences du Règlement sur le matériel brouilleur du Canada.

Battery Warning

Do not mutilate, puncture, or dispose of batteries in fire. The batteries can burst or explode, releasing hazardous chemicals. Discard used batteries according to the manufacturer's instructions and in accordance with your local regulations.

Varning

Eksplodingsfara vid felaktigt batteribyte. Använd samma batterityp eller en ekvivalent typ som rekommenderas av apparattillverkaren. Kassera använt batteri enligt fabrikantens instruktion.

Advarsel!

Lithiumbatteri—Eksplodingsfare ved fejlagtig håndtering. Udskiftning må kun ske med batteri af samme fabrikat og type. Levér det brugte batteri tilbage tilleverandøren.

Varoitus

Paristo voi räjähtää, jos se on virheellisesti asennettu. Vaihda paristo ainoastaan valmistajan suosittelemaan tyyppiin. Hävitä käytetty paristo valmistajan ohjeiden mukaisesti.

Advarsel

Eksplodingsfare ved feilaktig skifte av batteri. Benytt samme batteritype eller en tilsvarende type anbefalt av apparatfabrikanten. Brukte batterier kasseres i henhold til fabrikantens instruksjoner.

Waarschuwing!

Bij dit produkt zijn batterijen geleverd. Wanneer deze leeg zijn, moet u ze niet weggooien maar inleveren als KCA.

Uwaga

Nie kroić lub przekłuwać baterii, ani nie wrzucać ich do ognia. Mogą się rozerwać lub wybuchnąć wydzielając trujące środki chemiczne. Zużytych baterii należy pozbywać się w sposób opisany przez producenta i zgodnie z miejscowymi przepisami.

אזהרה
יש סכנת התפוצצות אם מחליפים את הסוללה בצורה לא נכונה.
יש להחליף את הסוללה בסוללה זהה או דומה, בהתאם להמלצת היצרן.
יש להשליך סוללות משומשות בהתאם להוראות היצרן

Intrinsic Safety Warnings

Warning – Explosion Hazard – Substitution of components may impair suitability for class I, division 2;

Warning – Explosion Hazard – When in hazardous location, turn off power before replacing or wiring modules, and,

Warning – Explosion Hazard – Do not disconnect equipment unless power has been switched off or the area is known to be non-hazardous.

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