

# PalmPilot™ Handbook



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# Contents

<b>Chapter 1 — The PalmPilot™ Connected Organizer and its Controls.....</b>	<b>1</b>
Front Panel Buttons and Controls .....	1
PalmPilot Stylus.....	3
Back Panel Doors, Buttons and Connections.....	4
Battery Installation .....	5
About the Backlight Feature .....	6
Safety, Care, and Maintenance.....	6
<b>Chapter 2 — Working with the PalmPilot™ Connected Organizer .....</b>	<b>9</b>
Starting PalmPilot for the First Time .....	9
General Preferences.....	11
Format Preferences.....	14
Modem Preferences.....	16
Owner Preferences.....	17
Buttons Preferences.....	19
ShortCuts and Digitizer Preferences.....	22
PalmPilot Applications .....	22
Using the Stylus to Write Text.....	24
Using the On-Screen Keyboard .....	33
Using Menus.....	35
On-line Tips .....	38
Using Categories .....	38
Attaching a Note to a Record.....	43
Private Records.....	44
<b>Chapter 3 — Date Book.....</b>	<b>45</b>
Activating the Date Book.....	45
Time Display .....	46
Scheduling an Event.....	46
Choosing a Date.....	50
Week View.....	52
Month View .....	55
Event Details.....	56
Using the Repeat Function .....	58
Date Book Menu Commands.....	60
Deleting an Event .....	63

<b>Chapter 4 — Address Book</b> .....	<b>65</b>
Activating the Address Book.....	65
Creating an Address Book Entry.....	66
Working with Address Book Entries .....	69
Address Book Entry Details.....	71
Address Book Menu Commands.....	72
Deleting an Address Book Entry.....	75
<b>Chapter 5 — To Do List</b> .....	<b>77</b>
Activating the To Do List.....	77
Working with To Do Items.....	78
To Do Item Details .....	80
To Do List Menu Commands.....	83
Deleting a To Do Item .....	85
<b>Chapter 6 — Memo Pad</b> .....	<b>87</b>
Activating the Memo Pad.....	87
Working with Memos .....	88
Arranging Memos.....	90
Memo Pad Menu Commands .....	91
Deleting a Memo .....	93
<b>Chapter 7 — Expense</b> .....	<b>95</b>
Activating Expense .....	96
Creating an Expense Item .....	98
Receipt Details .....	100
Show Options.....	103
Expense Menu Commands .....	104
Transferring Your Data to Microsoft Excel.....	107
Printing an Expense Report.....	111
<b>Chapter 8 — Additional Features</b> .....	<b>113</b>
Find Command .....	113
Phone Lookup .....	114
PalmPilot Calculator.....	116
Memory Application.....	118
Security System.....	120
Graffiti® ShortCuts.....	124
Menu Commands.....	127
Graffiti Strokes.....	129

<b>Chapter 9 — Installing PalmPilot™ Desktop Software</b> .....	131
About PalmPilot Desktop.....	131
System Requirements .....	132
Software Installation.....	132
<b>Chapter 10 — HotSync™ Technology</b> .....	135
The HotSync Process and the HotSync Manager.....	135
Conducting a Local HotSync .....	135
Selecting HotSync Options.....	139
Customizing the HotSync Feature.....	140
User Profile .....	142
Conducting a HotSync via Modem .....	144
<b>Chapter 11 — Installing Applications on your PalmPilot™</b>	
<b>Connected Organizer</b> .....	149
Using the PalmPilot Install Tool .....	149
Games.....	150
<b>Chapter 12 — Reference</b> .....	151
Troubleshooting .....	151
Resetting the PalmPilot™ Connected Organizer .....	156
<b>Appendix A: Technical Support, Service and Repair</b> .....	157
<b>Appendix B: Expense Templates</b> .....	160
<b>Appendix C: Creating a Custom Expense Report</b> .....	164
3Com End User Software License Agreement.....	176
Limited Warranty.....	178
FCC Statement.....	180
Canadian RFI Statement .....	181
<b>Index</b> .....	182

# Chapter 1

## The PalmPilot™ Connected Organizer and its Controls

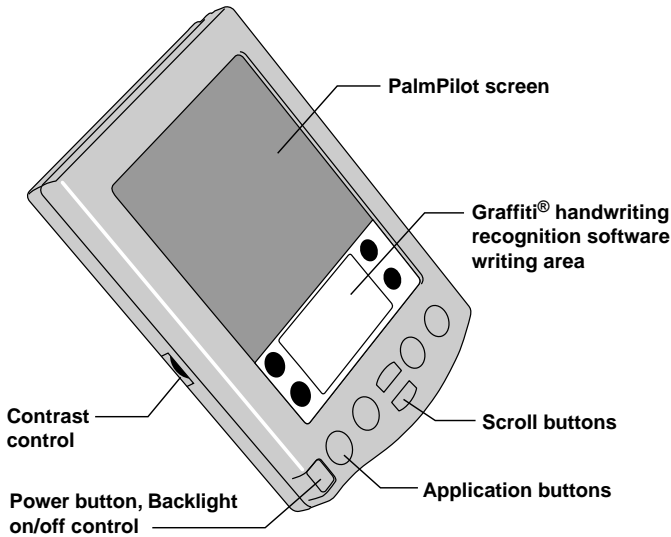


Congratulations on your purchase of the PalmPilot connected organizer. This handbook describes how to use your PalmPilot organizer and the applications that come with it.

This chapter explains the physical buttons and controls of your PalmPilot, how to install the batteries, and safety and care tips.

### Front Panel Buttons and Controls

The following diagram shows the screen, buttons and controls located on the front panel of the PalmPilot:



- **PalmPilot screen.** The PalmPilot screen displays the information stored in your PalmPilot, and is touch-sensitive to respond to the stylus. The PalmPilot screen also displays controls and settings that you use with your applications.
- **Graffiti® handwriting recognition software writing area.** The Graffiti handwriting recognition software writing area is the area where you write pen strokes of the Graffiti alphabet. Refer to the section entitled “Using the Stylus to Write Text” that appears in Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about how to write Graffiti character strokes.
- **Scroll buttons.** The scroll buttons are used to review text and other information that extend beyond the area of the PalmPilot screen. The lower scroll button is used to “scroll down” to review information, and the upper scroll button is used to “scroll up” to view the earlier information “above the screen.”

In the Date Book, these buttons are used to increment the day, week or month views.

- **Power button.** The power button is used to turn your PalmPilot on or off. If PalmPilot is turned off, pressing the power button will turn the unit on, and immediately activate the last application that was in use (return to the last screen you were viewing).

If your PalmPilot is turned on, pressing the power button will turn the unit off, helping to conserve battery life.

The power button also controls the PalmPilot organizer’s backlight feature. Hold the power button down for *about two seconds* to turn the backlight feature on or off.

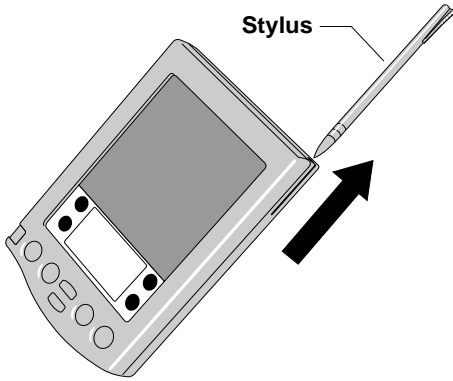
- **Application buttons.** The application buttons are used to activate the individual PalmPilot applications, and each button has a distinctive icon that corresponds to its application. Four application buttons appear on the front panel of your PalmPilot: Date Book, Address Book, To Do List, and Memo Pad. These buttons can be reassigned to activate any application stored on your PalmPilot organizer.

*Note:* If your PalmPilot is currently turned off, pressing any of the application buttons will activate PalmPilot, and immediately display the corresponding application.

- **Contrast control.** The contrast control is used to adjust the appearance of the PalmPilot screen for the clearest screen display. Depending on the lighting conditions or temperature of the environment where you use the PalmPilot, you may need to adjust the setting of the contrast control.

## PalmPilot Stylus

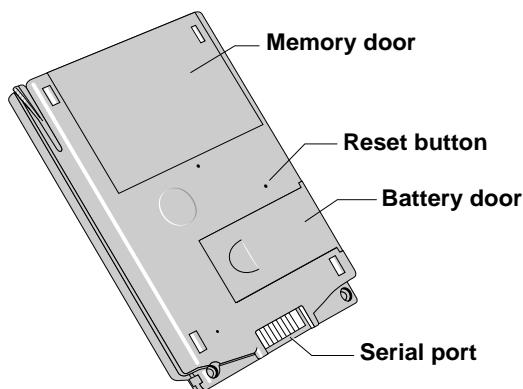
The stylus is stored in a silo molded into the right-hand side of PalmPilot. To use the stylus, slide it out from the silo, and grasp it in your fingers as you would a pen or pencil.



*Important:* Always use the point of the stylus for tapping, or making strokes on the PalmPilot screen. Never use an actual pen, pencil or other sharp object to write on the PalmPilot screen.



## Back Panel Doors, Buttons and Connections



- **Memory door.** The memory door covers the memory circuitry of your PalmPilot. The memory door may be removed to allow the installation of memory expansion units available from your dealer (or 3Com). However, you will never have to remove or replace the memory door in the normal use of your PalmPilot.
- **Reset button.** The actual reset button is located deep within PalmPilot, and can be activated by pushing the end of an unfolded paper clip (or similar blunt object) into the hole. *Never press the reset button with a sharp object, such as a pin.*

Under normal use, you should never have to use the reset button. Refer to the section entitled “Resetting the PalmPilot™ Connected Organizer” in Chapter 12: *Reference* for information about how to use the reset button.

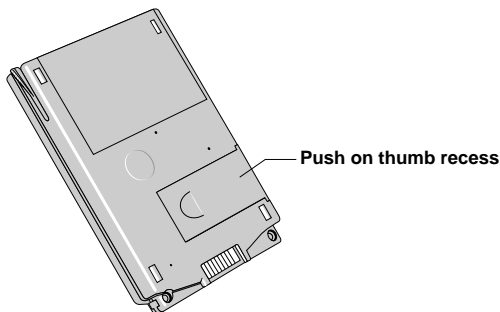
- **Battery door.** The battery door covers the batteries that power your PalmPilot. The following section explains how to remove the battery door to install the batteries.
- **Serial port.** The serial port fits into the connector of the PalmPilot Cradle. As you use your PalmPilot, you should make sure that the connection surface of the serial port remains clean and clear of debris.

## Battery Installation

To use the PalmPilot, you must install two (2) AAA alkaline batteries. The batteries fit behind the battery door on the back of your PalmPilot.

*To install the batteries in your PalmPilot,*

1. Remove the battery door from the rear of PalmPilot. Push on the thumb recess on the battery door, as shown in the following diagram:



2. While pushing the thumb recess, slide the battery door out and away from PalmPilot.
3. Install the two (2) AAA alkaline batteries into the battery compartment. These batteries are supplied with your PalmPilot.

A diagram in the interior of the battery compartment shows the orientation of the + and - ends of the batteries.

When correctly installed, the batteries will be secured by clips in the battery compartment.

4. Replace the battery door. When correctly installed the battery door will “click” into position, and be flush with the back of the PalmPilot.

**Important:** Do not force the battery door. When the batteries are correctly installed, the battery door will slide smoothly into place. If you feel resistance when replacing the battery door, make sure the door is correctly aligned with the slots on the back of your PalmPilot, and that the batteries are firmly seated in the battery compartment.

## About the Backlight Feature

If you have a PalmPilot model that includes the backlight illumination feature, you can activate the backlight when you first turn on the power for your PalmPilot.

*Note:* If you have upgraded your Pilot 1000 or Pilot 5000 organizer to the PalmPilot Professional Edition, the backlight feature will not be available. In this case, only the ROM software is upgraded. You must purchase a new PalmPilot Personal or Professional Edition to obtain the backlight feature.

*To activate the backlight feature:*

- Press the green power button, and hold it down for about two seconds. Release the green power button when the backlight illumination appears.

*To turn off the backlight feature:*

- Press and hold the green power button for about two seconds. The backlight feature also turns off automatically with the auto-off feature (after a period of inactivity).

In addition, you can use a full-screen pen stroke to activate the backlight feature. Refer to the section entitled “Buttons Preferences” that appears in Chapter 2: *Working with the PalmPilot™ Connected Organizer* for more information.

## Safety, Care, and Maintenance

Once you have installed the batteries in your PalmPilot, you are ready to start PalmPilot for the first time and begin working with the unit as described in Chapter 2: *Working with the PalmPilot™ Connected Organizer*.

The remainder of this chapter contains general information about PalmPilot and the PalmPilot Cradle.

### ***Safety Tips***

Your PalmPilot is designed to be rugged and reliable, and will provide years of trouble-free service. However, you should observe the following general tips when using your PalmPilot:

- Take care not to scratch the screen of your PalmPilot. When working with PalmPilot, use the supplied stylus, or plastic-tipped pens intended for use with a touch-sensitive screen. Never use an actual pen or pencil, or other sharp objects on the surface of the PalmPilot screen.
- Your PalmPilot is not water proof, 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 PalmPilot as you would a pocket calculator or other small electronic instrument.
- The touch-sensitive screen of your PalmPilot contains a glass element. Take care not to drop your PalmPilot, or subject it to any strong impact. Do not carry the PalmPilot in your back pocket: if you sit on it, the glass may break.
- Protect PalmPilot from temperature extremes. Do not leave PalmPilot on the dashboard of a car on a hot day, and keep it away from heaters and other heat sources.
- Do not store or use PalmPilot in any location that is extremely dusty, damp or wet.
- If it becomes necessary to clean your PalmPilot, use a soft, damp cloth. If the surface of the PalmPilot screen becomes soiled, it may be cleaned with a soft cloth moistened with a diluted window-cleaning solution.

### ***Battery Life and Considerations***

Please note the following considerations when replacing the batteries in your PalmPilot:

- Under normal conditions, PalmPilot organizer's batteries will provide several months of normal use. Battery life can be conserved by minimizing the use of the backlight feature, and changing the Auto-Off setting that automatically turns the PalmPilot off after a period of inactivity (refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer*).
- If the batteries become low in the course of normal use, an alert will appear on the PalmPilot screen, describing the low battery condition. If this alert appears, you should perform a HotSync™ synchronization to back up your data with a desktop computer before you replace the batteries. This will help prevent accidental data loss.

*Note:* A complete explanation of how to use the HotSync feature appears in Chapter 10: *HotSync™ Technology*.

- When replacing the batteries, begin by turning the PalmPilot off (so there is no screen display). Never remove the batteries while the PalmPilot is turned on.
- When replacing the batteries, always use good quality batteries of the same type. Use only alkaline batteries with your PalmPilot.
- When the batteries are removed, the built-in backup power of your PalmPilot will maintain memory data **for a period of up to one minute**. Whenever you remove the batteries, they should be replaced immediately. If you encounter any difficulties in the course of battery replacement, reinstall the original batteries and wait a few minutes for the backup power to recharge.
- If the batteries are drained to the point where your PalmPilot will not operate, it will safely store your data for about a month. In this case, there is enough residual energy in the batteries to store the data, but not enough to turn on the PalmPilot. If your PalmPilot will not turn on when you press the green power button, you should replace the batteries immediately.
- If you leave the drained batteries in your PalmPilot for an extended period of time, all of the stored data will be lost. If this happens, replace the batteries and use the reset button to

reset your PalmPilot. Refer to the section entitled “Resetting the PalmPilot™ Connected Organizer” in Chapter 12: *Reference* for information about how to use the reset button. After you reset the PalmPilot, perform a HotSync operation to restore the data from your PC.

## Chapter 2

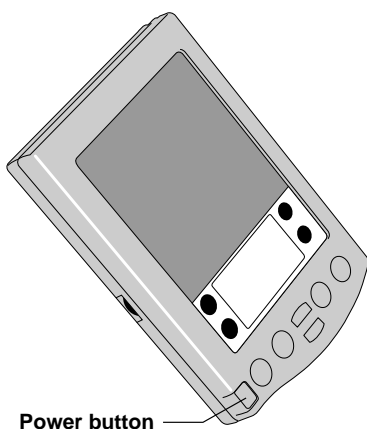
### Working with the PalmPilot™ Connected Organizer

**PalmPilot™** This chapter explains how to start your PalmPilot for the first time, how to make system and preferences settings, and common features that appear on PalmPilot organizer's screen.

#### Starting PalmPilot for the First Time

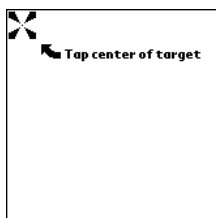
*To turn on your PalmPilot:*

1. Press the green power button located on the front panel of your PalmPilot, as shown in the following diagram:



*Note:* The power button acts as an on/off switch for the PalmPilot. Pressing the power button when the PalmPilot is running will turn the PalmPilot off.

2. A digitizer alignment screen appears, as shown in the following diagram:

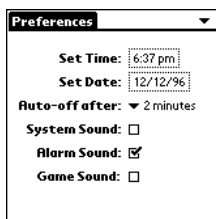


If necessary, adjust the contrast control located on the side of the PalmPilot, so this alignment screen is clear and readable.

3. Remove the stylus from its storage silo on the side of the PalmPilot. With the tip of the stylus, tap the exact center of each target that appears on the screen.

Tapping these three targets helps to align the internal circuitry of your PalmPilot with its touch-sensitive screen.

4. When you have tapped each of the three digitizer alignment targets, the General Preferences screen appears, as shown in the following diagram:



**Warning:** After you have completed the previous procedure, you *must* install the PalmPilot Desktop software on your desktop computer, and then perform a HotSync synchronization. This will ensure that the latest updates are transferred to your PalmPilot. Refer to Chapter 9: *Installing PalmPilot™ Desktop Software* and Chapter 10: *HotSync™ Technology* for these procedures.

## General Preferences

The General Preferences screen is the first screen that appears after you have tapped the targets to align the digitizer of your PalmPilot.



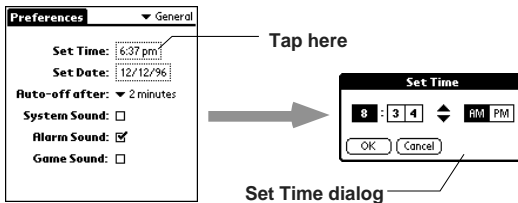
*Note:* If the General Preferences screen does not currently appear on the screen of your PalmPilot, you may have pushed one of the application buttons on the front panel. You can restart the Preferences application at any time from the Application picker. Refer to the section entitled “PalmPilot Applications” that appears later in this chapter.

### Setting the Current Time

The Set Time button of the General Preferences screen is used to set the current time for your PalmPilot.

#### To set the current time:

1. Tap the time. The Set Time dialog appears, as shown in the following diagram:



2. In the Set Time dialog, the hours setting is automatically highlighted (in black). Tap the up or down arrows to change the number for the hour.
3. Tap the minutes numbers, and then tap the arrows to adjust the settings for the current time.
4. Tap the AM or PM button as appropriate to correspond to the time of day.

*Note:* PalmPilot is also capable of displaying time based on a 24-hour clock. This setting is made with the Formats Preference, described in a following section.

5. Tap the OK button to close the Set Time dialog and return to the General Preferences screen.

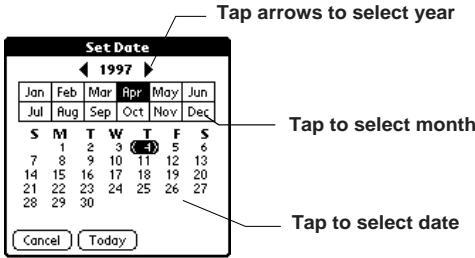
At this point, the time you selected appears in the Set Time area of the General Preferences screen.

### *Setting the Current Date*

The Set Date button of the General Preferences is used to set the current date for your PalmPilot.

#### *To set the current date:*

1. Tap the date. The Set Date dialog appears.
2. In the Set Date dialog, tap the arrows at the top to select the current year.



3. Below the year is a listing of months. Tap to select the current month.
4. Finally, tap the current date. The Set Date dialog closes, and you are returned to the General Preferences screen.

### *Auto Off Delay*

Your PalmPilot has an automatic shutoff feature that will turn off the power after a period of inactivity. If the backlight is activated, this automatic shutoff feature turns off the backlight as well as the PalmPilot. This feature helps conserve battery power in case you forget to turn off PalmPilot.

## *To set the auto off delay:*

1. Tap the “Auto-off after” setting.
2. A pick list appears, offering three options: a 1, 2 or 3 minute delay for the automatic shutoff feature. Tap to select the setting you want to use. The default setting is 2 minutes.

If you find that your PalmPilot shuts itself off before you have had time to review the information on the screen, you should increase the time setting of the automatic shutoff feature.

## *System, Alarm and Game Sounds*

Your PalmPilot uses a variety of sounds. The System, Alarm and Game Sound settings enable you to turn PalmPilot’s sounds on or off.

## *To set the system and alarm sounds:*

1. Tap the System Sound check box (so it’s checked) to activate system sounds. Tap the check box again to turn off the system sounds.

*Note:* When the System Sounds are turned off, the “chime” tones associated with the HotSync operation are also turned off.

2. Tap the Alarm Sound check box (so it’s checked) to activate the alarm sounds. Tap the check box again to turn off the alarm sounds.
3. Tap the Game Sound check box (so it’s checked) to activate sounds that are used by some games installed on your PalmPilot.

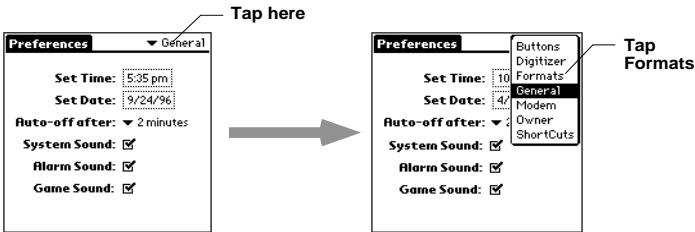
*Note:* The Game Sound setting only works with games that are programmed to respond to this setting. Older games typically will not respond to the Game Sound setting.

## Format Preferences

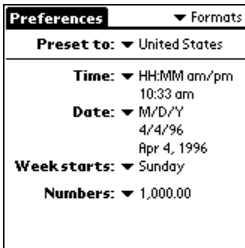
The Format Preferences screen is used to set the format of the dates, times, and numbers displayed by your PalmPilot.

*To activate the Format Preferences screen:*

1. Tap the text that appears in the upper-right corner of the Preferences screen. The pick list appears, as shown in the following diagram:



2. Tap Formats in the pick list. The Formats Preferences screen appears, as shown in the following diagram:

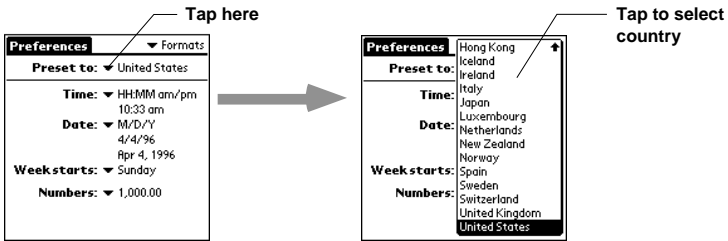


### Country Default

The country default sets date, time, and number conventions that are common for a variety of regions where you might use your PalmPilot. For example, in the United Kingdom, time often is expressed based on a 24-hour clock. In the United States it is based on a 12-hour clock with an AM or PM suffix.

## To set the country default:

1. Tap the country name. The pick list appears, as shown in the following diagram:



2. The pick list offers a variety of country options. Tap to select the setting you want to use.

*Note:* Selecting a country default will define the default settings for the Time, Date, Week start day, and the numbers formats used by all applications. You may further change these default settings for your own preferences, as described in the following sections.

### *Time, Date, Week Start, and Numbers Formats*

The Time setting defines the format for the time of day. The time format that you select will be used for all applications on your PalmPilot.

## *To select the Time, Date, Week Start, and Numbers format:*

1. Tap the Time selector, and its corresponding pick list appears. Tap to select the Time format that you want for your PalmPilot. When selected, an example of the current time appears under the Time format selector.
2. Tap the Date selector, and its corresponding pick list appears. Tap to select the Date format that you want for your PalmPilot.

When selected, an example of the current date appears under the Date format selector.

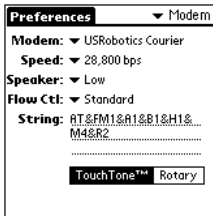
3. Tap the Week starts selector, and its corresponding pick list appears. Tap to select whether you want the first day of the week to be either Sunday or Monday. This setting controls the Day, Week, and Month views in the Date Book application, and all other aspects of PalmPilot that display a calendar.
4. Tap the Numbers selector, and its corresponding pick list appears. Tap to select the Numbers format that you want for your PalmPilot. When selected, an example of the Numbers format appears in the Numbers selector.

## Modem Preferences

The Modem Preferences screen enables you to define the settings for a modem directly connected to the PalmPilot.

*To activate the Modem Preferences screen:*

1. Tap the text that appears in the upper-right corner of the Preferences screen. The Preferences pick list appears.
2. Tap Modem in the pick list. The Modem Preferences screen appears, as shown in the following diagram:



3. Tap either the TouchTone or Rotary buttons as necessary for your particular telephone connection. The TouchTone setting is the default, and will be correct in most cases. You should only select the Rotary setting if you are certain that your telephone service does not support TouchTone dialing.

4. Tap the Modem pick list. The list includes modems that are compatible with the PalmPilot. Tap to select the type of modem connected to your PalmPilot.
5. *Note:* If the modem connected to your PalmPilot is not listed by name, choose the Hayes Basic selection. In most cases, the Hayes Basic settings will be close enough to optimal so that the PalmPilot will function correctly.
6. Tap the Speed pick list. Tap to select the maximum speed that corresponds to the modem that you selected in step #4.
7. Tap the Speaker pick list. Tap to select the speaker volume that you want for the modem.
8. Tap the Flow Control (Flow Ctl:) pick list. Tap to choose Standard, On (Xon), or Off (Xoff) flow control for the modem connection.
9. The String setting is a text-editable area that enables you to make changes to the modem set-up string. You may edit or make changes to this string as necessary for your particular modem connection.

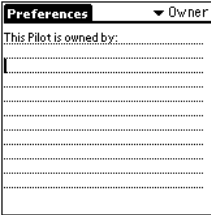
*Note:* The settings in the Modem Preferences screen are for PalmPilot applications that activate and use a modem. You can also display the Modem Preferences screen by tapping the Modem Setup button in the HotSync application. Refer to Chapter 10: *HotSync™ Technology* for more information about the HotSync application.

## Owner Preferences

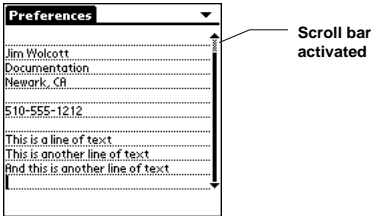
The Owner Preferences screen enables you to record a name, company name, phone number, or any other information that you want associated with your PalmPilot.

*To activate the Owner Preferences screen:*

1. Tap the text that appears in the upper-right corner of the Preferences screen. The Preferences pick list appears.
2. Tap Owner in the pick list. The Owner Preferences screen appears, as shown in the following diagram:



3. Enter the text that you want associated with your PalmPilot. If you enter more text than will fit on one screen, a scroll bar is automatically activated on the right side of the screen, as shown in the following diagram:



If you have used the Security application to turn off and lock the PalmPilot with a password, information that you put in the Owner Preferences is displayed the next time the PalmPilot is turned on. Refer to the section entitled “Security System” that appears in Chapter 8: *Additional Features* for more information.

If you have assigned a Password (with the Security application), the information in the Owner Preferences screen is “locked” and cannot be changed. In this case, an Unlock button appears at the bottom of the screen.



## *To unlock the Owner Preferences screen:*

1. Tap the Unlock button. The Unlock Message dialog appears.
2. Enter the password that you defined in the Security application, and tap the OK button.

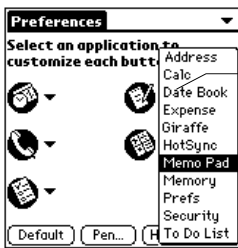
## **Buttons Preferences**

The Buttons Preferences screen enables you to associate different applications with the PalmPilot organizer's physical buttons.

For example, if you find that you seldom use the To Do List application, you can assign the To Do List button to start a different application, such as the Expense application.

## *To activate the Buttons Preferences screen:*

1. Tap the text that appears in the upper-right corner of the Preferences screen. The Preferences pick list appears.
2. Tap Buttons in the pick list. The Buttons Preferences screen appears.
3. Tap the pick list next to the button you want to assign. The pick list shows all the applications that are currently installed on your PalmPilot, as shown in the following diagram:



Tap arrow  
to show pick list

4. Tap to select the application that you want to assign to the button.

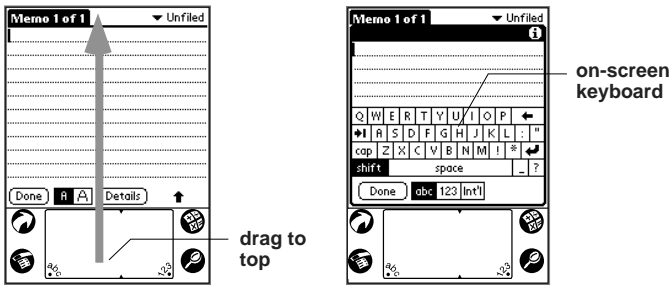
Any changes that you make in the Buttons Preferences screen become effective immediately; you do not have to change to a different screen or application.

If you assign a different application to a button, you can still access and use the original application by using the Application picker. Refer to the section entitled “PalmPilot Applications” that appears later in this chapter.

If you want to restore all of the buttons to their factory settings, tap the Default button.

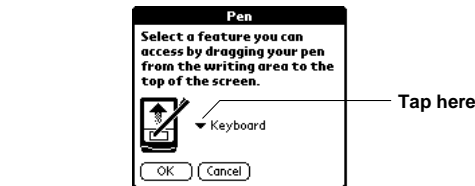
### Pen Preferences

The Buttons Preferences screen enables you to change the assignment of the full-screen pen stroke. By default, the full-screen pen stroke activates the on-screen keyboard, as shown in the following diagram:



### To change the Pen preferences:

1. In the Buttons Preferences screen, tap the Pen button. The Pen dialog appears, as shown in the following diagram:



2. Tap the pick list in the Pen dialog, and tap to select the setting that you want for the full-screen pen stroke.
3. Tap the OK button to complete your selection and return to the Buttons Preferences screen.

*The following Pen preferences settings are available:*

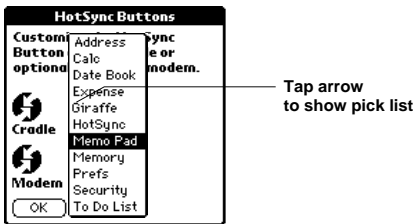
- **Backlight.** This setting will activate the backlight feature of the PalmPilot Personal and PalmPilot Professional Edition organizers. This setting can be used, instead of the power button, to turn the backlight on and off.
- **Keyboard.** This is the default setting, and activates the on-screen keyboard for entering text characters.
- **Graffiti Help.** This setting activates a series of screens that show the complete Graffiti penstroke character set.
- **Turn Off & Lock.** This setting will turn off and lock the PalmPilot. You must assign a password to lock the PalmPilot. When locked, you will need to enter that password the next time you use your PalmPilot.

### *HotSync Buttons Preferences*

The Buttons Preferences screen also enables you to associate different applications with the HotSync button on the PalmPilot Cradle, and the HotSync button on the optional PalmPilot™ Modem.

*To change the HotSync Buttons preferences:*

1. In the Buttons Preferences screen, tap the HotSync button. The HotSync Buttons dialog appears.
2. Tap the pick list next to the button you want to assign. The pick list shows all the applications that are currently installed on your PalmPilot, as shown in the following diagram:



3. Tap to select the application that you want to assign to each button. The default setting for each button is HotSync, which

means the Cradle and optional PalmPilot Modem perform their normal HotSync functions.

Any changes that you make in the HotSync Buttons Preferences screen become effective immediately; you do not have to change to a different screen or application.

## ShortCuts and Digitizer Preferences

The Preferences pick list includes the ShortCuts item. ShortCuts are abbreviations for entering text. The use of ShortCuts is explained in Chapter 8: *Additional Features*.

The Preferences pick list also includes the Digitizer item, which activates the digitizer calibration screen. This is the same screen that appears when you start your PalmPilot for the first time. A complete description of how to use the digitizer calibration screen appears earlier in this chapter, in the section entitled *Starting PalmPilot for the First Time*.

## PalmPilot Applications

Your PalmPilot is equipped with a variety of applications. The four main applications, Date Book, Address Book, To Do List and Memo Pad, can be activated with the front panel buttons on your PalmPilot. These four buttons can also be reassigned to any application installed on your PalmPilot, as described in the section entitled “Buttons Preferences” that appeared earlier in this chapter.

However, *all* applications installed on your PalmPilot appear in the Application picker. You can access and use the application picker to start any application installed on your PalmPilot.

## To access the Application picker:



Tap the Applications button on the PalmPilot screen. The Application picker appears, as shown in the following diagram:



*Note:* Different models of the PalmPilot may have different applications included. You may install additional applications as described in Chapter 11: *Installing Applications on your PalmPilot™ Connected Organizer*.

The Application picker also shows the current time, and the condition of the batteries in your PalmPilot.

### *Starting Applications*

The Application picker displays icons for each application currently installed in your PalmPilot. The order of the icons is alphabetical.

### *To start an application:*

- Tap the icon of the application that you want to start. If you have a large number of applications installed on your PalmPilot, you will have to use the down-arrow to see all of your applications.

As a shortcut, you can write the Graffiti® handwriting software character stroke for the first letter of the application you want to use. The Application picker will scroll to the first application that begins with that letter.

## Using the Stylus to Write Text

Your PalmPilot includes Graffiti handwriting software as the primary system for entering text and numbers. Graffiti is a system where simple strokes you write with the stylus are instantly recognized as letters or numbers.

This section explains the basics of Graffiti, and how to make strokes in the Graffiti writing area of your PalmPilot. More information about Graffiti, including its convenient ShortCuts feature, appears in Chapter 8: *Additional Features*.

### Starting the Memo Pad Application

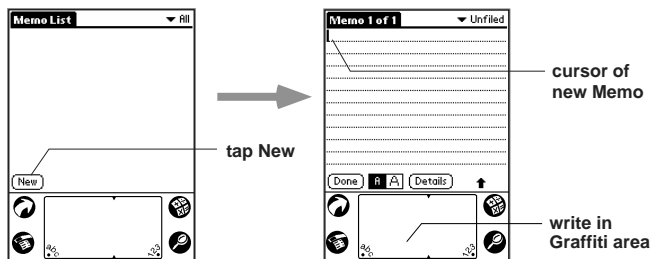
The Memo Pad application is ideal for practicing with the character strokes of the Graffiti alphabet. This section explains how to start the Memo Pad application so you can use and understand Graffiti. A complete explanation of the Memo Pad application appears in Chapter 6: *Memo Pad*.

#### To start the Memo Pad application:



1. Push the Memo Pad button on the front of your PalmPilot. The screen will change to display the Memo Pad application.

2. With the Memo Pad application running on your PalmPilot, tap the New button, as shown in the following diagram:



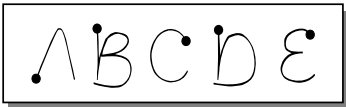
3. A new Memo Page appears on screen. A cursor is displayed at the upper-left of the Memo Page, representing the point where new text will appear.

## *Writing Letters with Graffiti*

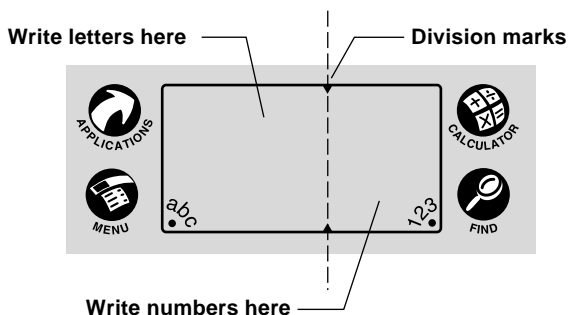
Any character you can type on a standard keyboard can be entered with Graffiti. The strokes recognized by Graffiti are designed to closely resemble those of the regular alphabet. This makes it quick and easy to learn Graffiti. Most users find they can enter text quickly and accurately with only minutes of practice.

*There are four basic concepts for successful text entry with Graffiti:*

- If you draw the character shape exactly as shown in the tables later in this chapter (like the shapes shown in the following diagram), you will achieve 100% accuracy for entering text.

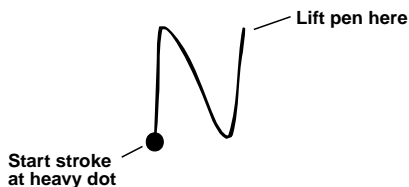


- The heavy dot that appears on each shape shows where to begin the stroke. Certain characters are created with similar shapes, but have different beginning and end points. Always begin the stroke at the heavy dot.
- Most characters can be created with a single stroke. When you lift the stylus from the Graffiti writing area, your PalmPilot recognizes and displays the text character immediately.
- The Graffiti writing area is divided into two parts: one for writing the letters of the alphabet, and one for writing numbers. The small marks at the top and bottom of the Graffiti writing area indicate the two areas, as shown in the following diagram.



## *To write letters of the alphabet with Graffiti:*

1. Tap on the screen to set the insertion point where you want your text to go. In this case, the insertion point is already set on a new line in the Memo Pad application.
2. Use the table on the following page to find the stroke shape for the alphabet character you want to create. For example, the stroke shown below creates the letter “n.”



As you'll see later, you use these shapes to create both upper and lower case letters.

3. Position the stylus inside the Graffiti writing area. For alphabet characters, be sure to use the left-side of the writing area.
  4. Based on the table, start your stroke at the heavy dot in the character shape, and draw the stroke shape as it appears in the table.
- Note:* Don't try to draw the dot shape itself. The heavy dot is there to show the starting point of the stroke.
5. Lift the stylus from the screen at the end of the stroke shape.



That's all there is to it! When you lift the stylus from the screen, your PalmPilot recognizes your stroke immediately and prints the letter character 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 that you want to create.

Note that there are two different stroke shapes available for some letters. For these letters, choose the one that's easiest for you.

*Important:* You must begin the character strokes in the Graffiti writing area. If you do not make Graffiti strokes in the Graffiti writing area, they will not be recognized as text characters.

### *Graffiti Tips*

*When writing with Graffiti, keep these tips in mind:*

- Accuracy improves when you write large characters. You should draw strokes that nearly fill the Graffiti writing area.
- To delete characters, simply set the insertion point to the right of the character you want to delete and make the backspace stroke (a line from right to left) in the Graffiti writing area.
- Write at natural speed. Writing too slowly can generate recognition errors.
- Do not write on a slant. Vertical strokes should be parallel to the sides of the Graffiti writing area.

# The Graffiti Alphabet

Letter	Strokes	Letter	Strokes
A		N	
B		O	
C		P	
D		Q	
E		R	
F		S	
G		T	
H		U	
I		V	
J		W	
K		X	
L		Y	
M		Z	

Space		Back Space	
Carriage Return		Period	<i>tap twice</i>

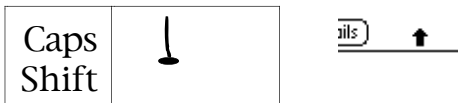
### *Writing Capital Letters with Graffiti*

You make capital letters with the same stroke shapes as the basic alphabet characters. To make capital letters, you must first “shift” to caps — just as you press the Shift key on a keyboard — and then write the character strokes.

*Note:* Graffiti incorporates a Smart Shifting feature which will automatically capitalize the first letter when you create a new record (by tapping a New button or a blank line).

*To draw the first letter of a word as a capital letter,*

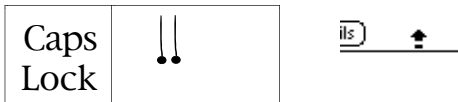
- Use the Caps Shift stroke:



When Caps Shift is activated, an “up arrow” symbol appears in the bottom right corner of the PalmPilot screen.

*To enter only capital letters (Caps Lock),*

- Use the Caps Lock stroke:



When Caps Lock is activated, an underlined “up arrow” symbol appears in the bottom right corner of the PalmPilot screen. To return to lowercase, make the Caps Shift stroke a second time.

### *Writing Numbers with Graffiti*

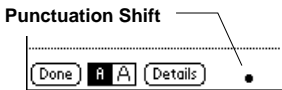
Writing numbers with Graffiti is similar to writing letters of the alphabet, except that you make the character strokes on the right-hand side (numbers side) of the Graffiti writing area.

## Graffiti Numbers

Number	Strokes	Number	Strokes
0		5	
1		6	
2		7	
3		8	
4		9	

## Writing Punctuation Marks with Graffiti

Graffiti can create any punctuation symbol that you can enter from a standard keyboard. All punctuation marks begin with a single tap on the Graffiti writing area. When you make this tap, you activate punctuation shift and a dot appears to show it is activated. The next stroke you make with the stylus will be recognized as a punctuation mark.



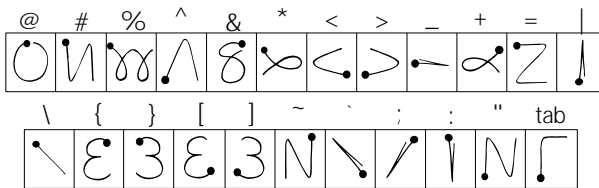
Symbol	Stroke	Symbol	Stroke
Period .		Dash —	
Comma ,		Left Paren (	
Apostrophe '		Right Paren )	

Question ?	?	Slash /	/
Exclamation !	!	Dollar \$	\$

*Note:* When punctuation shift is activated, you can make a symbol stroke anywhere in the Graffiti writing area (either the letters *or* numbers side).

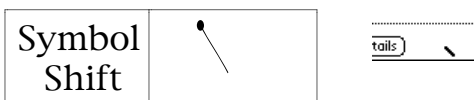
### Additional Graffiti Punctuation

You write the following punctuation marks and symbols the same way as the basic Graffiti punctuation marks. Begin with a single tap in the Graffiti writing area, and the next stroke that you make will create the punctuation mark or symbol.

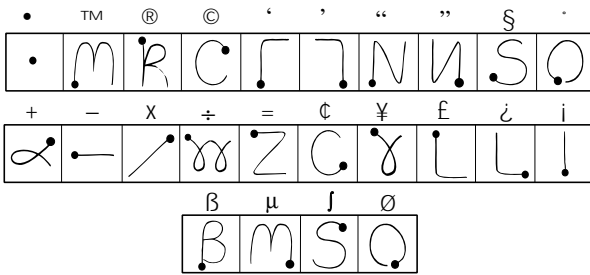


### Writing Symbols and Extended Characters

All symbols and extended characters begin with the symbol shift stroke in the Graffiti writing area of your PalmPilot:



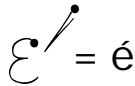
When the symbol shift is activated, a visual indicator appears at the bottom right of the screen. The next stroke that you make will create the symbol or extended character.



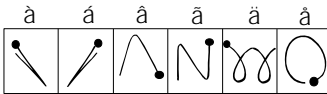
### Writing Accented Characters

To create accented characters, draw the stroke normally used to create the letter, followed by an accent stroke. Graffiti then adds the accent to the letter.

For example, the following diagram shows the strokes required to draw an accented “e.”



### Accent Strokes

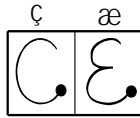


Using these accent strokes, you can write the following accented letters:

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

### Additional Non-English Characters

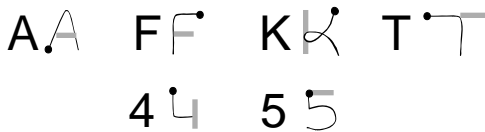
You can write the following characters in the lowercase alphabet mode without any special punctuation or shifting:



*Note:* These non-English characters must be written in the letters (not the numbers) side of the Graffiti writing area.

### Tips for Remembering Graffiti Strokes

The Graffiti stroke shapes are designed for speed and accuracy. Some stroke shapes are actually portions of letters, as shown in the following diagram:



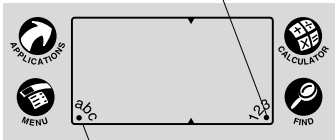
### Using the On-Screen Keyboard

You may choose to activate the on-screen keyboard any time text can be entered on your PalmPilot.

*To activate and use the on-screen keyboard:*

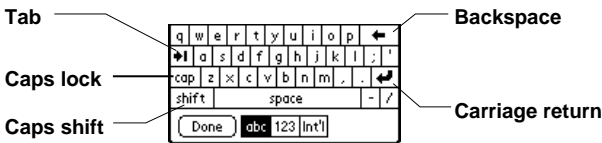
1. Start any PalmPilot application (such as the Memo Pad application, as described in the previous section). Tap to select a record (tap any record name, or tap the New button).
2. Tap the appropriate Keyboard Target in the Graffiti writing area. Tap the left target for the Alpha keyboard. Tap the right target for the Numeric keyboard, as shown in the following diagram:

Tap here for numbers keyboard



Tap here for letters keyboard

3. The Alpha on-screen keyboard resembles a computer keyboard, with Shift, Tab, Backspace and Carriage Return keys in their standard locations as shown in the following diagram:



4. Tap the buttons of the on-screen keyboard to generate text.
5. When you are finished, tap the Done button. The on-screen keyboard closes, and the text appears in your PalmPilot application.

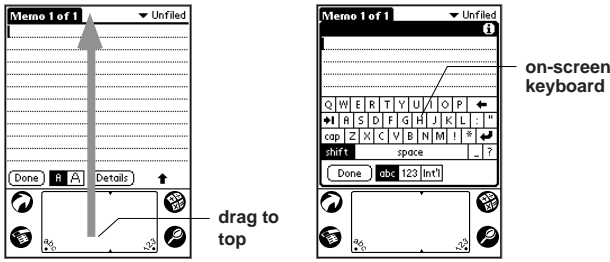
### *Activating the On-screen Keyboard with a Pen Stroke*

As an alternative, you can activate the on-screen keyboard with a full-screen pen stroke.

### *To activate the on-screen keyboard with a pen-stroke:*

- Touch the tip of the stylus to the Graffiti writing area, and drag upward to the top of the screen. The on-screen keyboard appears, as shown in the following diagram:

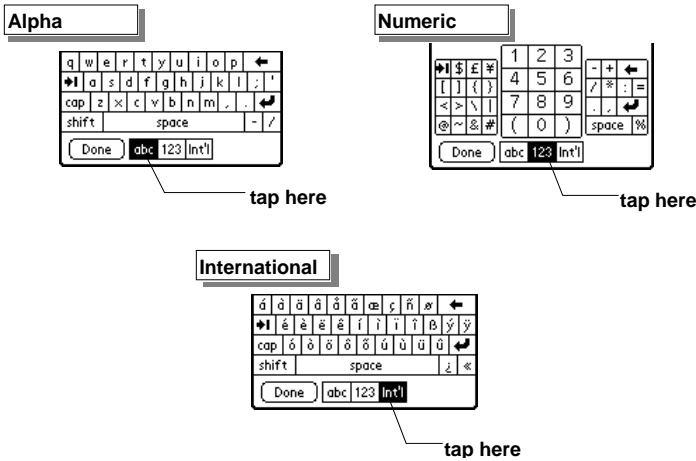




*Note:* The full-screen pen stroke can be reassigned to perform other functions on your PalmPilot. Refer to the section entitled “Buttons Preferences” that appears earlier in this chapter.

### Numbers and International Characters

The on-screen keyboard also includes screens for numeric and international characters. The following diagram shows the three screens that are available:



You may switch among the three screens at any time when using the on-screen keyboard to generate the exact text that you need for your PalmPilot.

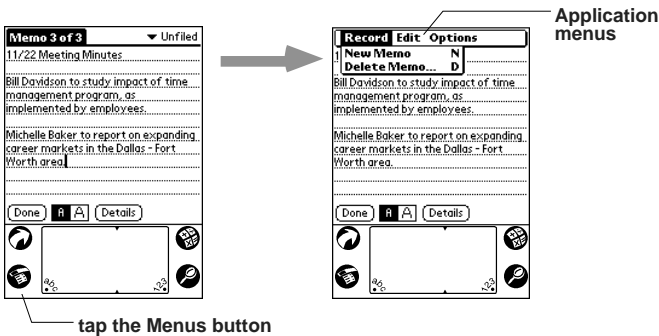
## Using Menus

Menus are a special set of commands that are available in most of your PalmPilot applications (Memo Pad, Date Book, etc.). The exact set of commands that appear in the menus relate to the application that is currently running on your PalmPilot.

Some of the menu commands are common to all PalmPilot applications. The common menu commands are described in this section; other menu commands are described in the chapters about each PalmPilot application.

### *To activate the menus:*

1. Start a PalmPilot application (such as the Memo Pad, as described earlier in this chapter).
2. Tap the Menus button, as shown in the following diagram:



3. The menus for the application appear at the top of the screen.

In this example diagram, three menus of commands are available: Record, Edit, and Options. The first menu, Record, is currently selected, showing the "New Memo" and "Delete Memo" commands.

### *Choosing a Menu*

Once you have activated the menus for an application, tap to select the menu that contains the command you want to use.

The menus, and menu commands that are available depend on the application that is currently running on your PalmPilot. Also, the menus and menu selections will vary depending on *which part* of the application is currently on the screen. Using the Memo Pad application as an example, the menus are different for the Memo List screen and the Memo screen.

*Note:* Most menu commands have a Graffiti command-stroke equivalent, similar to keyboard commands on a desktop computer. More information about Graffiti command strokes appears in Chapter 8: *Additional Features*.

### *Edit Menu Commands*

The Edit menu is available with any screen that allows you to enter or edit text. In general, the commands available in the Edit menu apply to text that you have *selected* 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. As you drag, the selected text will appear highlighted (in black). Drag *across* to select additional words; drag *down* to select successive lines of text.

#### *The following commands may appear in an Edit menu:*

- **Undo.** The Undo command reverses the action of the *last edit* command. For example, if you used the Cut command to remove text, the Undo command would replace the text that had been removed.
- **Cut.** The Cut command removes the selected text, and stores it temporarily in the memory of your PalmPilot. Text that has been cut can be pasted into another area of the PalmPilot application, or into a different PalmPilot application.
- **Copy.** The Copy command temporarily places a copy of the selected text in the memory of your PalmPilot. Text that has

been copied can be pasted into another area of the PalmPilot application, or into a different PalmPilot application.

- **Paste.** The Paste command inserts text that has been cut or copied at the selected point in your PalmPilot application. The Paste command will replace any selected text. If no text has been previously cut or copied, the Paste command does nothing.
- **Select All.** The Select All command selects all of the text on the current record or screen. This enables you to subsequently cut or copy all of the text, and paste it elsewhere.
- **Keyboard.** The Keyboard command activates the on-screen keyboard. When you are finished with the on-screen keyboard, tap the Done button.
- **Graffiti.** The Graffiti command activates screens that show the Graffiti character strokes. Use this command any time you forget a stroke for a particular character.

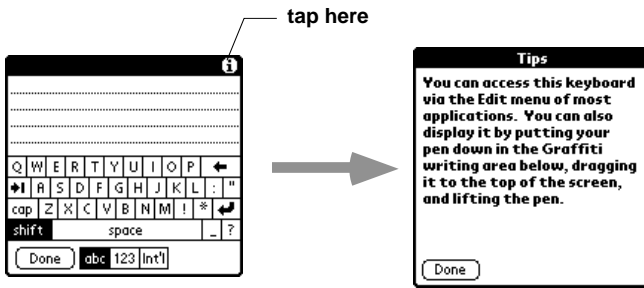
## On-line Tips

A dialog is a screen that appears on your PalmPilot, prompting you to enter information or make settings. A dialog always contains a Done button, so you can close the dialog when you are through with it. The on-screen keyboard is an example of a dialog.

Many of the dialogs that appear on your PalmPilot contain an on-line tips button in the upper right corner. On-line tips contain a summary about what is required by the dialog, short cuts for using the dialog, or other useful information.

### *To use the on-line tips:*

1. Tap the on-line tips button that appears in a dialog. The on-line tips dialog appears, as shown in the following diagram:



2. When you are through reviewing the information in the on-line tips dialog, tap the Done button.

On-line tips always relate to the function that you are currently performing with your PalmPilot. Each dialog that appears has its own on-line tips that relate to that specific dialog.

## Using Categories

Categories are used to file individual Address entries, To Do items or Memos into groups for easy review. Categories cannot be assigned to Date Book events.

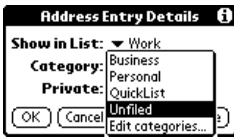
When you first create a record, it is listed as “Unfiled,” which means it does not belong to any particular category. You can leave a record as Unfiled, or assign it to a category at any time. Either way, the record will always be available until it is deleted.

*Note:* The use of categories is optional. You do not need to assign categories to use PalmPilot applications.

### *To assign a Category to a record:*

1. Display the Details dialog of the record by tapping a To Do item or Memo. For Address Book entries, tap the record, then tap the Edit button in the Address View screen (refer to the descriptions in each chapter for details).
2. Tap the Details button to display the Details dialog.

3. Tap the currently assigned category (“Unfiled” for new records). The Category pick list appears, as shown in the following diagram:



4. Tap to select the category that you want to assign to the record.
5. Tap the OK button to close the Details dialog and activate your setting.

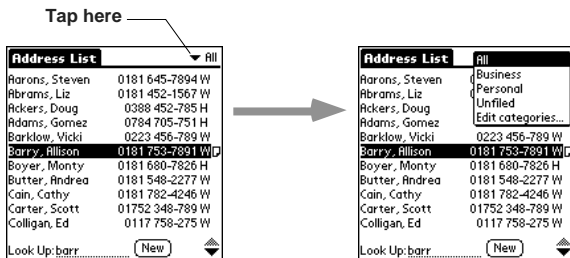
The category you choose is only used for sorting and reviewing records. The category you select does not affect the actual contents of the record.

### Using Categories in Lists

Once you have assigned categories to your records, you can easily display lists of your record entries by category.

#### To use the Categories in the List:

1. In the List view, tap the category that appears in the upper-right corner of the screen, as shown in the following diagram:



2. The category pick list appears in the List screen. Tap the category of entries that you want to view.
3. The List screen changes to show only the records that have been filed in the category you have selected.

Repeat the previous procedure, and tap All in the Category pick list to restore the list of all Address Book entries.

*Note:* When using applications with categories, pressing the application button on the PalmPilot organizer's front panel will toggle through the available categories.

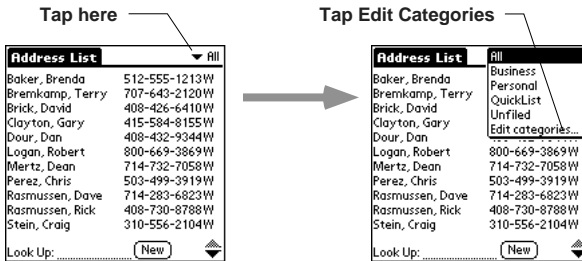
### *Defining a New Category*

Your PalmPilot is supplied with two default categories: Business and Personal. In addition, the Address Book contains the QuickList category, designed as a "quick reference" of commonly used names, addresses and phone numbers (such as doctor, lawyer, etc.).

You can change the names of these default categories, or add new categories to suit your needs. You can define up to 15 categories for each application.

### *To define a new Address Book Category:*

1. Tap the category that appears in the upper-right corner of the screen, as shown in the following diagram:



2. Tap the Edit Categories item. The Edit Categories dialog appears on the screen, as shown in the following diagram:



3. Tap the New button. Another Edit Categories dialog appears, as shown in the following diagram:



4. Enter the name of the new category, and tap the OK button to close the Edit Categories dialog.
5. Tap the OK button to close the main Edit Categories dialog.
6. Any changes you have made in the Edit Categories dialog appear in the Category pick list. You may edit any of your records, and file them in the new categories as appropriate.

*Note:* You can “merge” two or more Categories by assigning them the same name. For example, if you change the name of the “Personal” category to the name “Business,” all entries formerly in the Personal category will appear in the Business category.

### ***Renaming Categories***

You can also use the Edit Categories dialog to change the names of any existing category.

### ***To change the name of an Address Book Category:***

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



2. Tap the Edit Categories item. The Edit Categories dialog appears on the screen, as shown in the following diagram:



3. Tap to select the category that you want to rename, and then tap the Rename button. Another Edit Categories dialog appears, as shown in the following diagram:



4. Enter the new name that you want to assign to the category, and tap the OK button to close the Edit Categories dialog.
5. Tap the OK button to close the first Edit Categories dialog.
6. Any changes you have made in the Edit Categories dialog appear in the Category pick list. You may edit any of your records, and file them in the new categories as appropriate.

*Note:* You can “merge” two or more Categories by assigning them the same name. For example, if you change the name of the “Personal” category to the name “Business,” all entries formerly in the Personal category will appear in the Business category.

*Note:* You can also edit and assign categories from the Address Edit view (Address Book) and Memo view (Memo Pad). Refer to the chapters for those applications for details.

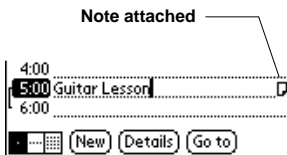
## Attaching a Note to a Record

PalmPilot applications (except the Memo Pad) enable you to attach a note to an item, record or event. A note is anything that

you want to write, and can be up to several thousand characters long. For example, if you have scheduled an appointment in the Date Book application, you could attach a note with directions to the location of the appointment.

### *To attach a note to an item, record, or event:*

1. PalmPilot applications have a Details button, that enables you to define the characteristics of individual records. Tap the Details button to display the Details dialog.
- Note** 2. With the Details dialog on the screen, tap the Note button. The Note dialog appears.
3. The name of the event appears at the top of the Note dialog. Write Graffiti character strokes (or use the on-screen keyboard) for the text you want to appear in the note. Use the Carriage Return stroke to move down to new lines in the note.
4. Tap the Done button to close the Note, and return to the Details dialog.
5. Tap the OK button to close the Details dialog and confirm your settings. The application screen reappears.
6. A small note icon appears at the right side of any item that has a note attached, as shown in the following diagram:



7. To review or edit the contents of the note associated with an item, tap the small note icon.

## Private Records

In PalmPilot applications you have the option of marking individual records as Private. Private records will remain visible and accessible until you change the PalmPilot Security setting to hide all Private records.

### *To mark a record as Private:*

1. PalmPilot applications have a Details button, that enables you to define the characteristics of individual records. Tap the Details button to display the Details dialog.  
  
**Private:**  2. With the Event Details dialog on the screen, tap the Private check box. A check mark appears to show that the item is marked as Private.

Any event marked as Private will still appear in your PalmPilot application, and can be changed or edited. The PalmPilot Security settings can be used to make all Private records invisible. Refer to Chapter 8: *Additional Features* for complete information about how to activate and use the PalmPilot Security settings.



## Chapter 3

### Date Book



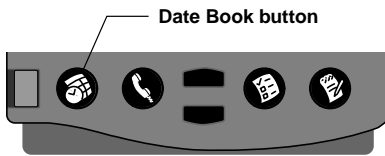
The Date Book enables you to quickly and easily schedule appointments, or any kind of activity associated with a time and date.

*With the Date Book, you can:*

- Make a description of an appointment, and associate it with a specific time and date.
- Use the Week View feature to display a chart of your appointments for an entire week. The Week View feature also makes it easy to spot any potential scheduling overlaps or conflicts.
- Use the Month View feature to quickly spot days where you have morning, lunch, or afternoon appointments.
- Activate an alarm to sound an audible “beep” tone prior to the scheduled activity.
- Create reminders for events that are based on a particular date, rather than time of day. Birthdays and anniversaries are easy to track with your PalmPilot™ connected organizer.
- Attach notes to individual events, for a description or clarification of the entry in your Date Book.

### Activating the Date Book

Push the Date Book button on the front panel of the PalmPilot™ connected organizer. The screen will change to display the Date Book screen.



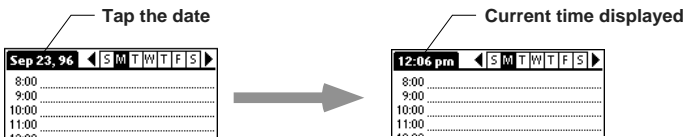
*Note:* When working with the Date Book, you can immediately change to any other application (Address Book, etc.) of your PalmPilot by pushing the front panel buttons. Any work you have done with the Date Book will be saved, and will reappear when you return.

## Time Display

When you work with the Date Book, you can easily read the current time of day.

### *To display the current time:*

1. In the Date Book application, the title bar displays the date, as shown in the following diagram:



2. Tap the date to display the current time. After a few seconds, the title bar reverts to show the date.

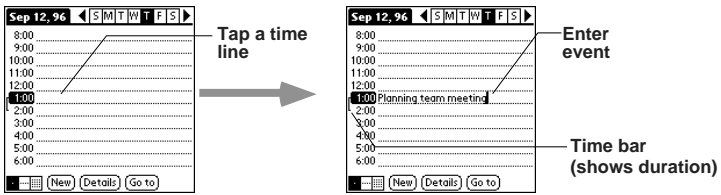
## Scheduling an Event

An event can be any kind of activity that you associate with a day, with or without a particular time during the day.

When the Date Book screen first appears, it shows the current date and a list of times that correspond to a normal business day. You can enter a new event on any of the available time lines.

## To schedule an event for the current day:

1. Tap the time line that corresponds to your event, as shown in the following diagram:



2. The event time will be highlighted on the screen. A cursor appears at the beginning of the time line, representing the point where new text will appear.

Use the stylus to write Graffiti<sup>®</sup> character strokes (or the on-screen keyboard) to describe your event. You can enter up to 255 characters.

3. Tap on a blank area of the screen to de-select the event. A vertical line appears to the left of the time, indicating the duration of the event.

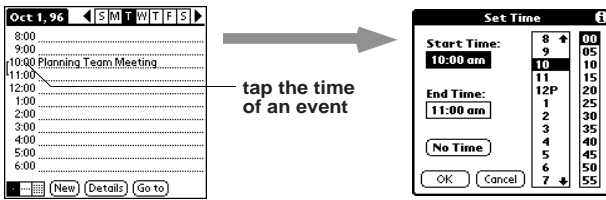
*Note:* You can activate the Set Time dialog (to select a start time) by simply writing a number on the number side of the Graffiti writing area.

### Start Time and Duration

When you create 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.

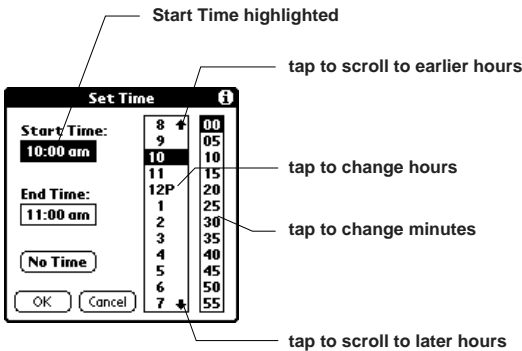
### To change the start time and duration of an event:

1. Tap the time of the event that you want to change. The Set Time dialog appears, as shown in the following diagram:



tap the time of an event

- The Start Time of the event is highlighted in the Set Time dialog. Tap the columns of times that appear on the right side of the Set Time dialog, as shown in the following diagram:



- Next, tap to select the End Time box. Tap the columns of times that appear on the right side of the Set Time dialog.
- Tap the OK button to confirm your selection, and close the Set Time dialog.

Any changes you make to the start time and duration appear in the Date Book screen when you close the Set Time dialog.

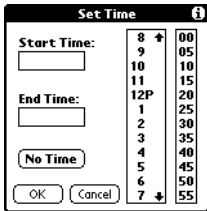
### Untimed Events

You may want to include events in your Date Book that occur on a particular date, but have no specific start or end times. These are referred to as untimed events. Birthdays, holidays and anniversaries are all examples of untimed events.

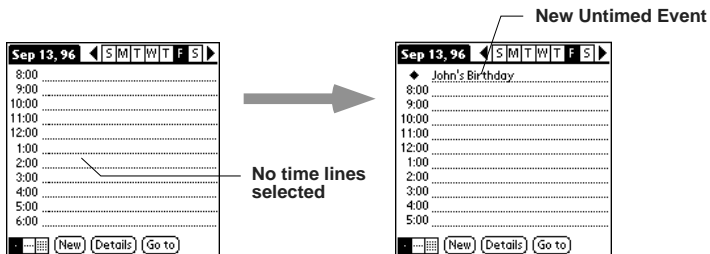


## To schedule an untimed event:

1. In the Date Book screen, choose the date that you want for the event.
2. Tap new. The Set Time dialog appears, as shown in the following diagram:



3. Tap OK, so that no start or end times are defined for the new event.
4. Use the stylus to write Graffiti strokes for the text you want to use to describe your Event. A new untimed event will appear at the top of the Date Book screen, as shown in the following diagram:



5. Tap anywhere on the screen to de-select the untimed event.

The new untimed event will appear as a diamond in the time list, clearly showing that it is not associated with any particular time. You can have more than one untimed event on a particular date.

*Note:* You can create a new untimed event by making sure no event is selected, and then writing letters in the Graffiti writing area. You can also set an alarm for an untimed event, as described in the “Event Details” section that appears later in this chapter.

### Changing an Event to an Untimed Event

If you create an event and decide later that there is no particular start or end time, you can easily change it to an untimed event.

#### *To change an event into an untimed event:*

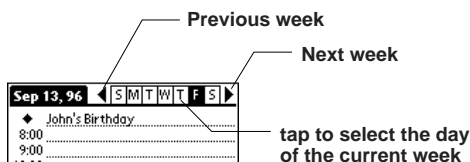
1. In the Date Book screen, tap the time of the event. The Set Time dialog appears.
2. Tap the **No Time** button. The Start Time and End Time boxes are cleared.
3. Tap the OK button to confirm your selection, and close the Set Time dialog.

### Choosing a Date

Your events for the current day appear when you start the Date Book application of your PalmPilot. You can easily create events for any date that you want. This section describes how to move to a specific date in the Date Book.

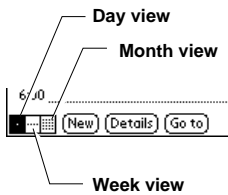
#### *To move to a particular date:*


- The Date Bar appears at the top of the Date Book screen. Tap the day of the week that you want, as shown in the following diagram:



- Tap the Go To button to display the Go to Date dialog. This displays a calendar that allows you to select a date.
- In Day view, you can press the scroll buttons on the PalmPilot organizer's front panel to quickly scan your week's schedule. Press the up button to move to the previous day. Press the down button to move to the next day.

- Tap the Day, Week, or Month view buttons at the lower-left of the Date Book screen, as shown in the following diagram:



- From any day currently displayed in the Date Book, press the Date Book button on PalmPilot organizer's front panel to switch among the current day view, week view, and month view.
-  Use the on-screen scroll arrows if you have more than one page of times and events.

When you use any of these methods to select a day, the day and its events immediately appear on the Date Book screen.

### *Go To Date*

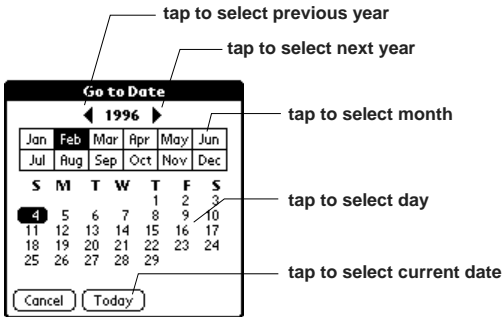
The Go to button enables you to quickly select any date for creating or reviewing your events.

### *To go to a specific date:*



1. In the Date Book screen, tap the Go to button. The Go to Date dialog appears.

- The Go To Date dialog offers a variety of controls to select the year, month, and day for your events, as shown in the following diagram:



- Tap the controls in this dialog to select the date that you want. Use the Today button to return to the current date.

## Week View

The Week view feature shows a chart of your events for an entire week. This feature lets you quickly review your appointments, and see the available time slots for a new event.

In addition, the Week view graphically displays any overlaps and conflicts in the events you have scheduled.

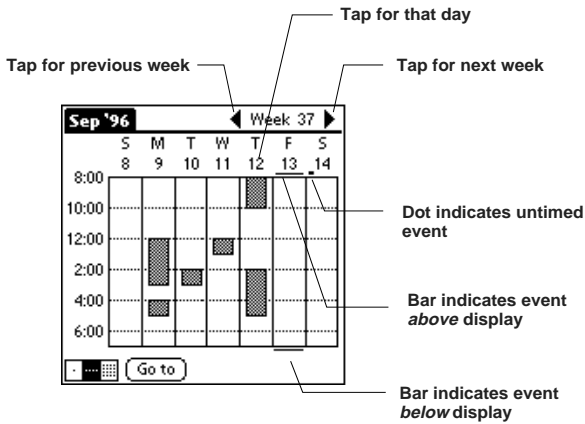
### *To activate the Week view:*

- In the Date Book screen, tap the Week button. The Week view appears.

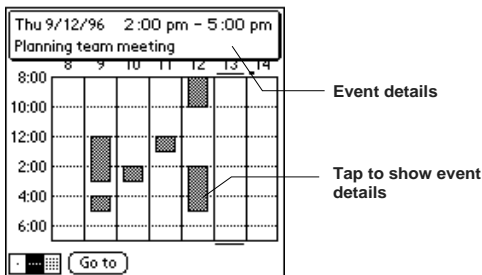


- The Week view offers navigation controls to move forward or backward a week at a time, or view details of an event. The Week view also shows events that are either before or after

the range of times that are displayed, and untimed events as shown in the following diagram:



3. Tap any of your events to show a description of the event, as shown in the following diagram:



If you want to re-schedule any of the events that appear in the week view, tap and drag the event to a different time or a different day.

You can tap a blank time on any day to move to that day, and have the time selected for a new event. Or, you can tap any of the days and dates that appear at the top of the Week view to move directly to that day without selecting an event.



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 the column that corresponds to the day of the event. On-screen scroll arrows appear if you have scheduled events beyond the displayed time range.

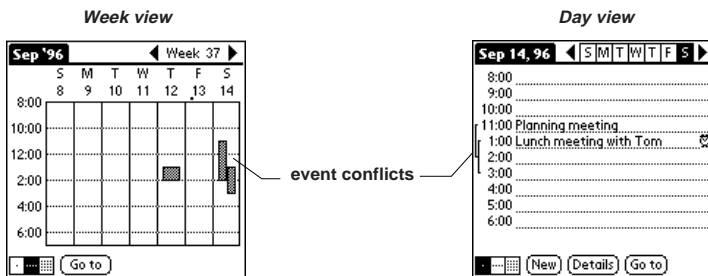
You can also control the Week view with the scroll buttons on the PalmPilot organizer's front panel. Press the up button to move to the previous week. Press the down button to move to the next week.

The Go to button appears in the Week view. Tap the Go to button to activate the Go To Date dialog, and select any week you want to display in the Date Book.

### Event Conflicts

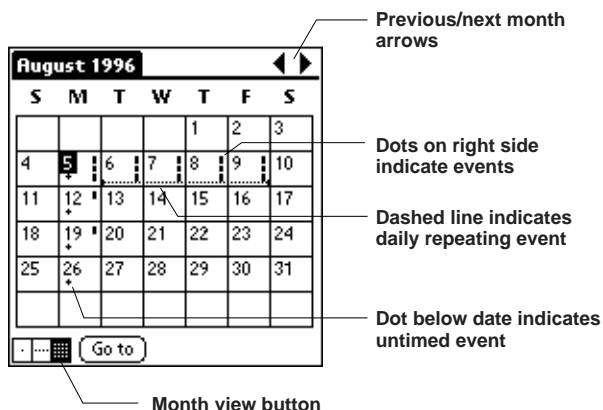
With the ability to define specific start and end times for any event, it's possible to schedule events that overlap. In other words, an event that starts before a previous event has finished.

In this case, any event conflict (time overlap) appears in the Week view as overlapping bars. The Day view displays bracketed bars to the left of the conflicting times as shown in the following diagram:



## Month View

The Month view screen shows which days have events scheduled. Dots and lines in the Month view indicate events, repeating events, and untimed events as shown in the following diagram:



Tap any day that appears in the Month view screen to move directly to that day with the Day view screen. Tap the arrows at the top to move forward or backward a month. Tap the Go to button to display the Date Picker and choose a different month.

When the Month view is on the screen, you can use the PalmPilot organizer's front-panel scroll buttons to move among the months. Press the up button to display the previous month. Press the down button to display the next month.

*Note:* You can control the dots and lines that appear in the Month view. Refer to the Month View settings of the Options menu, as described later in this chapter.

## Event Details

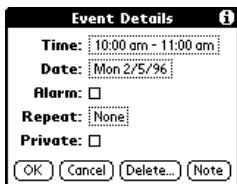
The Date Book provides a variety of options that you can associate with an event. The available options appear in the Event Details dialog.

### *To activate the Event Details dialog:*

1. In the Day view of the Date Book screen, tap anywhere on the text of an event.

Details...

2. Tap the Details button. The Event Details dialog appears, as shown in the following diagram:



The following sections describe the features and settings that are available in the Event Details dialog.

### *Time*

The Time setting displays the current start and end times for an event. For an untimed event, the Time setting simply shows “No Time.”

### *To change the Time setting:*

12:00 pm - 5:00 pm

1. With the Event Details dialog on the screen, tap the Time button. The Set Time dialog appears.
2. Use the Set Time dialog to change the start time or end time of the event. Complete information about how to use the Set Time dialog appears in the section entitled *Starting Time and Duration*, earlier in this chapter.
3. Tap the OK button in the Set Time dialog to confirm your new settings, and return to the Event Details dialog.



## Date

The Date setting enables you to change the date associated with the event.

### *To change the Date setting:*

Tue 2/6/96

1. With the Event Details dialog on the screen, tap the Date button. The Set Date dialog appears.
2. Use the Set Date dialog to assign the date associated with the event. The controls available in the Set Date dialog are the same as those for *Go To Date*, described earlier in this chapter.
3. Tap the date to return to the Event Details dialog.

## Alarm

The Alarm setting enables you to set an audible alarm for your PalmPilot. You can set the alarm to sound minutes, hours, or days before an event.

### *To set an Alarm for an event:*

**Alarm:**

1. With the Event Details dialog on the screen, tap the Alarm check box. A check mark appears to show that the Alarm is activated.
2. The default setting for the Alarm is 5 minutes before the time of the event. If desired, you can change this to be any number of minutes, hours or days.

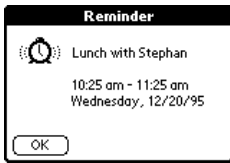
Tap the Minutes area of the Event Details dialog. The Alarm time units pick list appears.

3. Next, change the default numerical setting. Select the "5", and enter any number from 0 to 99 (inclusive).

When you close the Event Details dialog, a small alarm icon appears to the far right of the event with the alarm.

Once you have activated an Alarm for an event, the Alarm tone will sound on your PalmPilot at the appropriate time. In addition, a

descriptive message will appear on the screen of the PalmPilot, as shown in the following diagram:



*Note:* You can set a silent Alarm for an untimed event. In this case, the alarm will be triggered at the specified period of minutes, hours or days before midnight (beginning) of the day of the untimed event. No audible alarm will sound for an untimed event; instead, the descriptive message will appear on the PalmPilot organizer's screen.

For example, you could create a reminder for an untimed event that occurs on February 4th. If the alarm reminder is set for 5 minutes, the alarm reminder will appear at 11:55 pm on the night of February 3rd. The reminder will still be on screen the next time you turn on your PalmPilot.

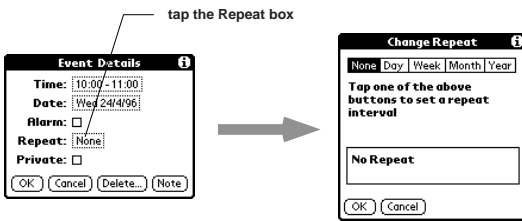
## Using the Repeat Function

The Repeat function enables you to set an event to automatically repeat in the Date Book.

A birthday is a good example of an event that you would want to set to repeat annually. Another example would be a weekly guitar lesson that falls on the same day of the week, and the same time of day.

*To set the Repeat function for an event:*

1. In the Date Book screen, tap anywhere on the text of an event.
2. Tap the Details button. The Event Details dialog appears.
3. In the Event Details dialog, tap the Repeat box. The Change Repeat dialog appears, as shown in the following diagram:



4. Tap Day, Week, Month, or Year at the top of the Change Repeat dialog. The dialog will show the options for the repeat type you selected.
5. Select a Repeat increment. In the “Every” area, enter a number that corresponds to how often you want the event to repeat. For example, if you select Month, you could enter the number “2” to have the event repeat every other month.
6. If you want to specify an ending date for the repeating event, tap the End on pick list, and tap Choose Date. Use the Date Picker to select an end date.
7. Tap the OK button to close the Change Repeat dialog and activate your settings.

When you close the Change Repeat dialog, a small repeat icon appears to the far right of the repeating event.

### *Considerations for the Repeat Function*

If you subsequently make changes to the settings for a repeating event, PalmPilot takes the following into consideration:

- If you change the start date of a repeating event, PalmPilot calculates the number of days you have moved the event. PalmPilot then automatically changes the end date to maintain the duration of the repeating event.
- If you change the *repeat type* (e.g. daily to weekly) of an occurrence of a repeating event, past occurrences (prior to the day on which the setting is changed) are left alone and a new repeating event is created.

- If you change the date of an occurrence of a repeating event (e.g. from January 14th to January 15th) and apply the change to all occurrences, the new date becomes the start date of the repeating event. The end date is adjusted accordingly to maintain the duration of the event.
- If you change other repeat settings (e.g. time, alarm, private) of an occurrence of a repeating event, and apply the change to all occurrences, a new event is created. The start date of this new event is the day on which the setting is changed. Past occurrences (prior to the day of the change) are left alone and not changed.
- If you make a change to one occurrence of a repeating event (e.g. time), that occurrence no longer shows the repeat icon.

## Date Book Menu Commands

The Date Book includes menu commands to perform common file and editing tasks. This section explains the menu commands that are specific to the Date Book.

Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about menu commands common to all of your PalmPilot applications.

### Record Menu

When you select the Record menu, its menu commands appear on screen as shown in the following diagram:

Record	Edit	Options
New Event	/N	
Delete Event...	/D	
Attach Note	/A	
Delete Note...	/O	
Purge...	/E	

- **New Event.** The New Event command creates a blank untimed event. The Set Time dialog opens, allowing you to choose start and end times for the new event.
- **Delete Event.** The Delete Event command displays an alert dialog, prompting you to confirm that you want to delete the current event. You must tap to select an event before you can

use the Delete Event command. If you tap the OK button, the event is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the Date Book screen.

The default setting for the Delete Event alert is to “Save archive copy on PC.” This will remove the event from the Date Book, but retain a copy of the event and transfer it to an archive file on your desktop computer the next time you perform a HotSync operation.

- **Attach Note.** The Attach Note command opens the Note dialog, where you can create a Note that will be attached to the currently selected event.
- **Delete Note.** The Delete Note command displays an alert dialog, prompting you to confirm that you really want to delete the Note attached to the event. If you tap the OK button, the Note is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the Date Book.
- **Purge.** The Purge command is used to conserve memory on your PalmPilot by deleting events that are older than the period of time that you select — based on the current date of the PalmPilot organizer’s internal clock. Repeating events are purged if they *end* before the date that you activate the Purge command.

The Purge command displays an alert dialog, prompting you to confirm that you want to purge events older than a certain time period. The default setting for the Purge alert is to “Save archive copy on PC.” This will remove events from the Date Book, but retain copies and transfer them to an archive file on your desktop computer during the next HotSync operation.

### Options Menu

When you select the Options menu, its menu commands appear on screen as shown in the following diagram:

Record	Edit	<b>Options</b>	
	Preferences		/R
	Display Options		/Y
	Phone Lookup		/L
	About Date Book		

- **Preferences.** The Preferences command enables you to set the range of times that appear in the Date Book, and whether Alarms are automatically activated for each event.
- **Display Options.** The Display Options command allows you to make settings for the appearance of the Date Book, and control which events are displayed:



- **Show Time Bars.** Activates the time bars that appear in the Day View. The time bars show the duration of an event, and graphically illustrate the nature of any event conflict.
- **Compress Day View.** The feature changes the way times appear in the Day View. When Compress Day View is off, all time slots are displayed. When it is on, blank times slots toward the bottom of the screen are eliminated to minimize scrolling. Start and end time slots are displayed for each event, to clarify the event's duration.
- **Month View settings.** These check boxes only apply to the Month view of the Date Book. You can activate any or all of these settings to show that you have Timed, Untimed, or Daily Repeating events in the Month view *only*.
- **Phone Lookup.** The Phone Lookup command activates the Phone Lookup feature, which is described in Chapter 8: *Additional Features*.
- **About Date Book.** The About Date Book command shows version (revision) information about the Date Book.

## Deleting an Event

There are three ways to delete an event that you have created in the Date Book application: simply delete the text of the event, use the Menu Commands (described in the Record Menu section), or use the Event Details dialog.

*Note:* If you have deleted the text of a repeating event, all instances of that event are deleted. If you use the Menu Command or the Event Details dialog, you can delete one occurrence of the event (as an exception), or all occurrences of the event.

### *To delete an event with the Event Details dialog:*

1. Tap anywhere in the text area of the event to delete, and tap the Details button. When the Event Details dialog appears, tap the Delete button.
2. The Delete Event alert appears. Tap the OK button to confirm that you want to delete the event.

## Chapter 4

### Address Book



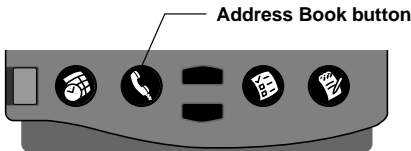
The Address Book enables you to keep records of names, addresses, phone numbers and other information about your personal or business contacts.

#### *With the Address Book, you can:*

- Quickly look up or enter names, addresses, phone numbers and other information.
- Enter up to five phone numbers (home, work, fax, car, etc.) or e-mail addresses that are associated with each name.
- Define which of the phone numbers will appear in the Address List view for each Address Book entry.
- Attach a note to each Address Book entry, where you can enter additional information about the entry.
- Assign categories to your Address Book entries, so you can quickly sort and view your entries in logical groups.

### Activating the Address Book

Push the Address Book button on the front panel of the PalmPilot™ connected organizer. The screen will change to display the Address Book screen.





*Note:* When working with the Address Book, you can immediately change to any other application (Date Book, etc.) of your PalmPilot by using the front panel buttons. Any work you have done with the Address Book will be saved.

When working with the Address Book, the scroll buttons on the PalmPilot organizer's front panel make it easy to navigate among your address entries. In the Address List screen, the scroll buttons move up or down an entire screen of address entries. In the Address View screen, the scroll buttons move to the previous or next address entry.

## Creating an Address Book Entry

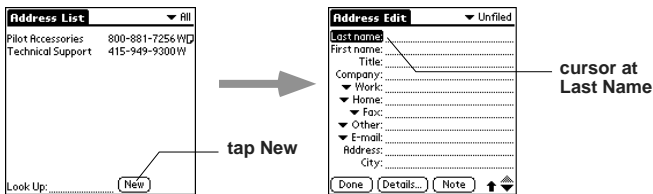
An Address Book entry is where you store name and address information about people or businesses. Your PalmPilot makes it easy to sort Address Book entries based on an individual's name or company.

*Note:* You can also use the PalmPilot Desktop software to create Address Book entries with your desktop computer, and download the entries to your PalmPilot with the next HotSync™ operation.

In addition, the PalmPilot Desktop software has data Import capabilities that enable you to load database files into the Address Book of your PalmPilot. Refer to the online documentation supplied with the *PalmPilot Desktop Software* for complete information.

### *To create a new Address Book Entry:*

1. Tap the New button, as shown in the following diagram:



- The Address Edit screen appears. A cursor is displayed at the Last Name field of your new Address Book Entry, representing the point where new text will appear.
- Enter the text you want to write for the last name of the person in your Address Book Entry.

*Note:* The first letter of each field is automatically capitalized (except numeric and e-mail fields). You do not have to use the Graffiti “capital” stroke to capitalize the first letter of the name.

- Use Graffiti® software’s Next Field stroke to move down to the First Name field of the Address Edit screen, as shown in the following diagram:

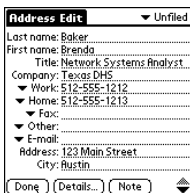


*Note:* You can also move to any field in the Address Edit screen by tapping it directly.

- With the cursor located in the First Name field, enter the first name of the person in your Address Book entry.
- Repeat steps #3 and #4 to enter the information that you want associated with each Address Book Entry.

Use the on-screen scroll arrows to move to the next page of information.

- When you are finished entering information in the Address Edit screen, tap the Done button, as shown in the following diagram:



tap Done

Repeat the previous procedure any time you want to create a new Address Book Entry.

*Tip:* You can create an Address Book entry that always appears at the top of the list by beginning the Last name (or Company name) field with a blank space. For example, you might create an entry with “If Found Call” (beginning with a blank space), that contains contact information to be used in case your PalmPilot is lost.

### *Editing an Address Book Entry*

Once you have created an Address Book entry, you may at some point want to update or enter additional information.

### *To edit an Address Book Entry*

1. In the Address List screen, tap the Address Book entry that you want to change. The Address View screen appears.
2. Tap the Edit button (or anywhere on the screen). The Address Edit screen appears for the Address Book Entry, as shown in the following diagram:



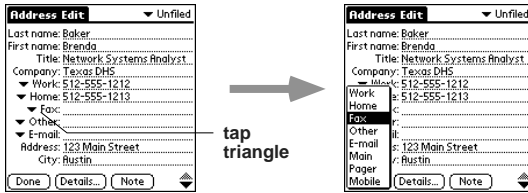
3. Tap to select any of the data fields (Address, City, etc.) and enter or change the information.
4. When you are finished, tap the Done button to return to the Address List screen.

### *Choosing Types of Phone Numbers*

Your PalmPilot enables you to choose among other types of phone numbers or e-mail that you associate with an Address Book entry.

## To choose other types of phone numbers in an Address Book entry:

1. In the Address Book, display the Address Edit screen for your Address Book entry (either by creating a new Address Book entry, or editing an entry as described previously).
2. Tap the word or the black triangle that appears next to the type of Phone number that you want to specify. A pick list appears, as shown in the following diagram:



3. In the pick list, tap to select the new phone number category that you want.

*Note:* Any changes you make to the types of phone numbers will apply only to the current Address Book entry. They are not applied to new or existing Address Book entries.

## Working with Address Book Entries

Once you have created several Address Book entries, PalmPilot offers features that enable you to quickly find your entries, sort them by category, and display the entries by name or company name.

### Looking Up Address Entries

The Address List screen includes a Look Up feature that lets you quickly scroll to any of your Address entries.

## To Look Up an Address entry:

1. Enter the first letter of the text you want to find in your Address Book entries. The text you enter appears on the Look Up line, as shown in the following diagram:



Look Up line

The Look Up feature scrolls to the first entry in the list that begins with that letter. If you write an additional letter, the list will scroll to the first entry that starts with those *two* letters. For example, writing an “s” might scroll to “Sanders,” and writing “sm” might scroll further to “Smith.”

*Note:* If the list is sorted by company name, the Look Up feature scrolls to the first letters of the company names.

2. Tap any entry to view its contents, or use the carriage return stroke to view the selected entry.

### Address Categories

Categories are used to file individual Address Book entries into groups for easy review. You can assign and edit categories by using the Categories pick list in the Details dialog (refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for a complete description of categories). In addition, the Address Book provides a quick way to assign and edit categories.

### *To assign a category to an Address Book entry:*

1. Tap the Address Book entry that you want to assign to a category. The Address View screen appears.
2. Tap the Edit button. The Address Edit screen appears.
3. Tap the text in the upper-right corner of the screen. The Address Category pick list appears.

4. In the Address Category pick list, tap to select the category that you want to assign to the Address Book entry.

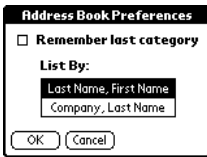
### *Names or Companies*

Another option for the Address List view is to display your Address Book entries sorted by Company and Last Name, rather than by Last Name and First Name.

### *To change the display of the entries in the Address List view:*



1. With the Address Book application running in the Address List view, tap the Menus button. The Options menu appears at the top of the screen.
2. Tap to select the Preferences menu item. The Address Book Preferences dialog appears, as shown in the following diagram:



3. Tap to select the setting that you want for the Address List view, and then tap the OK button. A dialog appears briefly to indicate that PalmPilot is sorting the list. The display of the Address List view then changes to reflect your setting.

Address Book entries with no company name appear sorted by last name. Note that these settings do not change your Address Book data in any way; they merely change the view.

## **Address Book Entry Details**

The Address Book provides a variety of options that you can associate with an Address entry. The available options appear in the Address Entry Details dialog.

## To activate the Address Entry Details dialog:

1. In the Address List view, tap any Address Book entry. The Address View screen for that entry appears.
2. Tap the Edit button. The Address Edit screen appears.
3. Tap the Details button. The Address Edit Details dialog appears, as shown in the following diagram:

Details...



The following sections describe the features and settings that are available in the Address Entry Details dialog.

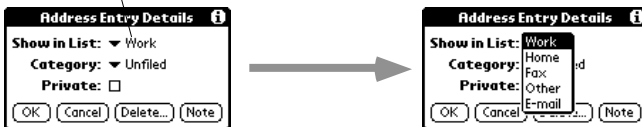
### Choosing the Phone Number for the List View

Up to five phone numbers or e-mail addresses can be associated with each Address entry. As described in previous sections, you may select that each of these five be for home, work, fax, and so on. Your PalmPilot gives you the option of choosing *which* of these phone numbers appears on the Address List screen.

### To choose the phone number that appears in the Address List screen:

1. Tap the word next to Show in List. The pick list appears, as shown in the following diagram:

Tap here



2. In the Show in List pick list, tap to select the phone number that you want displayed along with the Address Book entry.

3. Tap the OK button to confirm your selection, and close the Address Details dialog.

*Note:* The Show in List setting that you select applies only to the individual Address Book entry, rather than to all entries. In other words, you can select the phone number to be displayed for each Address Book entry.

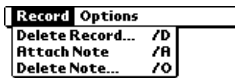
## Address Book Menu Commands

The Address Book includes menu commands to make it fast and easy to perform common file and editing tasks. This section explains the menu commands that are specific to the Address Book.

Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about menu commands that are common to all of your PalmPilot applications.

### Record Menu

When you select the Record menu, its menu commands appear on screen as shown in the following diagram:



- **Delete Record.** The Delete Record command displays an alert dialog, prompting you to confirm that you want to delete the current entry. If you tap the OK button, the entry is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the previous screen.

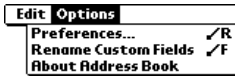
The default setting for the Delete Record alert is to “Save archive copy on PC.” This will remove the entry from the Address Book, but retain a copy of the entry and transfer it to an archive file on your desktop computer the next time you perform a HotSync operation.



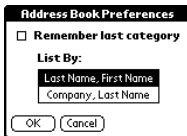
- **Attach Note.** The Attach Note command opens the Address Book Note dialog, where you can create a Note that will be attached to the currently selected entry.
- **Delete Note.** The Delete Note command displays an alert dialog, prompting you to confirm that you really want to delete the Note attached to the entry. If you tap the OK button, the Note is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the previous screen.

### Options Menu

When you select the Options menu, its menu commands appear on screen as shown in the following diagram:

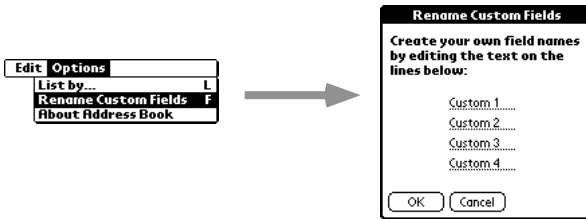


- **Preferences.** The Preferences command displays the Address Book Preferences dialog, as shown in the following diagram:



- **Remember last category.** This setting determines how the Address Book will appear when you return from some other PalmPilot application (Memo Pad, To Do List, etc.). If you activate this setting, the Address Book will appear showing the category that was last selected. When this setting is off, the Address Book appears showing the address entries for *all* categories.
- **List By.** This setting determines how address entries appear and are sorted in the List View. You can choose to have address entries appear by last name, first name, or by company name, last name.

- **Rename Custom Fields.** Each Address Book entry contains four “custom fields” that you can rename, as shown in the following diagram:



*Note:* Any changes you make to the names of the custom fields will appear in all of your Address Book entries.

- **About Address Book.** The About Address Book command shows version (revision) information about the Address Book.

## Deleting an Address Book Entry

There are two ways to delete an entry that you have created in the Address Book application: use the Menu Commands (described in the Record Menu section), or use the Address Entry Details dialog.

*To delete an entry with the Address Entry Details dialog:*

1. In the Address List view, tap any Address Book entry. The Address View screen appears for that entry.
2. Tap the Edit button. The Address Edit screen appears.
3. Tap the Details button. The Event Details dialog appears.
4. Tap the Delete button. The Delete Address alert appears.
5. Tap the OK button to confirm that you want to delete the entry.

## Chapter 5

### To Do List



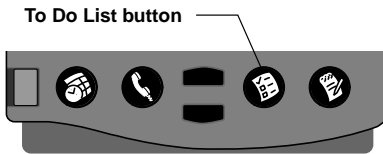
The To Do List is designed as a convenient location where you can create reminders, and prioritize the things that you “have to do.”

*With the To Do List, you can:*

- Make a quick and convenient list of things to do.
- Assign a priority level to each individual task.
- Optionally assign a due date for any, or all of your To Do items.
- Optionally assign a Category for any, or all of your To Do items. You can then view your To Do List based on Category (Business, Personal, etc.)
- Sort your To Do items either by due date, priority level, or category.
- Attach notes to individual To Do items, for a description or clarification of the task.

### Activating the To Do List

Push the To DoList button on the front panel of the PalmPilot™ connected organizer. The PalmPilot screen will change to show the To Do List screen.



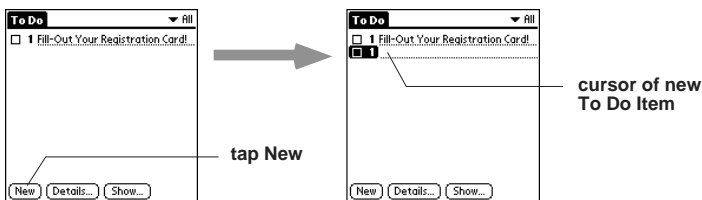
*Note:* When working with the To Do List, you can immediately change to any other application (Address Book, etc.) of your PalmPilot by using the front panel buttons. Any work you have done with the To Do List will be saved, and will reappear when you return.

## Working with To Do Items

A To Do item is a reminder of some task that you have to complete. Your PalmPilot gives you considerable flexibility in the appearance, level of detail, and the sort order of To Do items.

*To create a To Do item:*

1. Tap the New button, as shown in the following diagram:



2. A new To Do item appears on the screen. When you create a new To Do item, its Priority is automatically set to level "1", the highest (most important) level. However, if you have a To Do item selected, the new item appears beneath the selected item and is given the same priority as the selected item.

A cursor is displayed at the beginning of the new To Do item, representing the point where new text will appear. Enter the text you want to appear in the To Do item. Note that the text you enter for the To Do item can be more than one line in length.

3. Tap anywhere on the screen to de-select the To Do item.

Repeat the previous procedure any time you want to create a new To Do item.

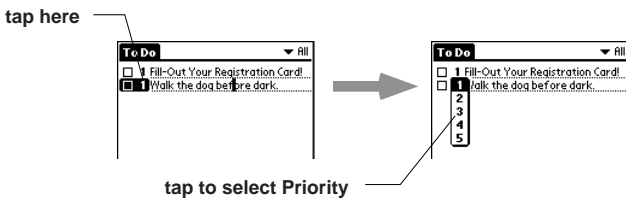
*Note:* If no To Do item is currently selected, writing in the Graffiti® writing area automatically creates a new To Do item.

### Setting Priority

Priority settings for To Do items enable you to arrange the tasks in your To Do List according to relative levels of importance. You may assign a Priority level of 1 (most important) through 5 (least important). The Priority feature of the To Do List is optional.

#### *To set a Priority level for a To Do item:*

1. Tap the Priority number that appears on the left side of the To Do item, as shown in the following diagram:



2. A pick list of Priority numbers appears. Tap the Priority number that you want to set for the To Do item.

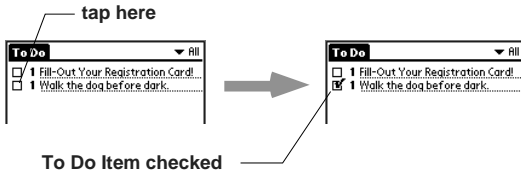
*Note:* The default setting for the To Do List is to arrange To Do items according to their priority setting and due date, with priority 1 items at the top. If you have a number of To Do items in your list, changing an item's priority setting may move its position in the list. You can also change the Priority setting for a To Do item with the To Do Details dialog, as described later in this chapter.

### Checking Off a To Do Item

The To Do List makes it easy to mark tasks that you have completed.

## To check off a To Do item:

- Tap the To Do item check box that appears at the far left of the To Do item, as shown in the following diagram:



You can set the To Do List to either show or hide To Do items that you have checked off (completed). You can also have the To Do List record the date that you completed the To Do item. Refer to the section entitled *To Do Show Options* that appears later in this chapter.

## To Do Item Details

The To Do Item Details dialog enables you to make settings that relate to individual To Do items.

### To activate the To Do Item Details dialog:

1. In the To Do List screen, tap anywhere on the text of a To Do item.

**Details...**

2. Tap the Details button. The To Do Item Details dialog appears, as shown in the following diagram:



The following sections describe the features and settings that are available in the To Do Item Details dialog.

## Choosing a To Do Category

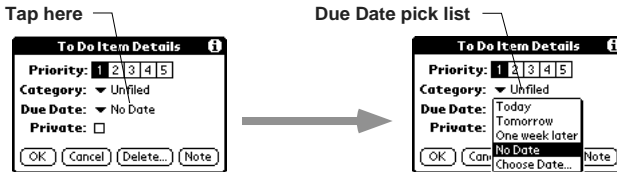
Categories are used to file individual To Do items into groups for easy review. You can assign and edit categories by using the Categories pick list in the Details dialog (refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for a complete description of categories).

## Setting a Due Date

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

### To set a Due Date for a To Do List Item:

1. In the Details dialog, tap the “No Date” text. The Due Date pick list appears, as shown in the following diagram:



2. Tap the Due Date that you want associated with the To Do item. The following choices are available:
  - **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.** No due date is associated with the To Do item.
  - **Choose date.** Enables you to choose any due date that you want to be associated with the To Do item. If you tap the Choose date item, the Due Date dialog appears. Tap to select the due date.

3. Tap the OK button to confirm your selection, and close the To Do Details dialog.

*Note:* If you have the Show Due Dates option activated in the To Do Show options, you can bypass the Details dialog. Tap directly on the due date area of the To Do List to display the pick list shown in step #2 of the previous procedure.

If you choose to show the due dates in the To Do List, any To Do item that has a due date (and is not checked as completed) will change to show an exclamation mark after the date passes.

### *To Do Show Options*

Once you have assigned due dates to one or more To Do items, you should activate the dates so they appear in the To Do List. The Show Options dialog contains the control to activate the dates, as well as other options for the To Do List application.

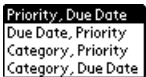
### *To display the Show Options dialog:*

- Tap the Show button in the To Do List screen. The To Do Preferences dialog appears, as shown in the following diagram:



### *The following settings are available in the To Do Preferences dialog:*

- **Sort by:** The settings in this pick list enable you to sort the To Do items in four different ways, as shown in the following diagram:





- **Show Completed Items.** This setting causes the To Do application to show the To Do items that you have completed. If this setting is turned off, your To Do items are removed from the list when completed (checked). You can change this setting at any time to display or hide the To Do items that you have completed.
- **Show Only Due Items.** This setting causes the To Do application to show only the To Do items that are currently due, past due, or have no due date specified. When this setting is activated, To Do items that are not yet due do not appear in the list until their due date.
- **Record Completion Date.** The due date automatically changes to the completion date when you check (complete) the item. If you have not assigned a due date to an item, the completion date is still recorded when you check the item.
- **Show Due Dates.** This setting causes the To Do application to display the due dates associated with To Do items in the To Do List screen.
- **Show Priorities.** This setting causes the To Do application to show the priority numbers for the To Do items in the To Do List screen.
- **Show Categories.** Activating this setting changes the list view to show the category of each To Do item. The category appears at the far right of the screen.

## To Do List Menu Commands

The To Do List includes menu commands to perform common file and editing tasks. Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about menu commands that are common to all PalmPilot applications.

### *Record Menu*

When you select the Record menu, its menu commands appear on screen as shown in the following diagram:

Record	Edit	Options
Delete Item...	/D	
Attach Note	/A	
Delete Note...	/O	
Purge...	/E	

- **Delete Item.** The Delete Item command displays an alert dialog, prompting you to confirm that you want to delete the current To Do item. You must first select a To Do item before it can be deleted. If you tap the OK button, the To Do item is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the To Do list.

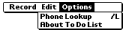
The default setting for the Delete Item alert is to “Save archive copy on PC.” This will remove the item from the To Do list, but retain a copy of the item and transfer it to an archive file on your desktop computer the next time you perform a HotSync operation.

- **Attach Note.** The Attach Note command will open the To Do Note dialog, where you can create a note that will be attached to the currently selected To Do item.
- **Delete Note.** The Delete Note command displays an alert dialog, prompting you to confirm that you really want to delete the note attached to the To Do item. You must first select a To Do item before its note can be deleted. If you tap the Yes button, the Note is deleted from the memory of your PalmPilot. If you tap the No button, the alert dialog closes and you are returned to the To Do List.
- **Purge.** The Purge command is used to delete To Do items that you have completed (checked). All completed To Do List items will remain in the To Do List until you use this command.

The Purge command displays an alert dialog, and the default setting is to “Save archive copy on PC.” This will remove completed To Do items from the To Do List, but retain copies and transfer them to an archive file on your desktop computer the next time you perform a HotSync operation.

## Options Menu

When you select the Options menu, its menu command appears on screen as shown in the following diagram:



- **Phone Lookup.** The Phone Lookup command activates the Phone Lookup feature, which is described in Chapter 8: *Additional Features*.
- **About To Do List.** The About To Do List command shows version (revision) information about the To Do List.

## Deleting a To Do Item

There are three ways to delete a To Do item: simply delete the text of the To Do item, use the Menu Command (as described in the previous section, about the Record Menu), or use the To Do Details dialog.

*To delete a To Do item with the To Do Details dialog:*

1. Tap to select the To Do item that you want to delete. Tap anywhere in the text area of the item.
2. Tap the Details button, and then tap the Delete button. The Delete To Do alert appears.
3. Tap the OK button to confirm that you want to delete the To Do item.

## Chapter 6

### Memo Pad



The Memo Pad provides a place to take notes that are not associated with Date Book, Address Book, or To Do items.

#### *With the Memo Pad, you can:*

- Take notes, or write any kind of message on your PalmPilot™ connected organizer.
- Drag and drop memos into popular desktop applications like Microsoft Word, when you synchronize using PalmPilot Desktop software and HotSync™ technology.
- Assign categories for memos. This enables you to quickly view just your business-related memos, personal memos, or any other category that you define.
- Quickly jot down phone numbers and other types of information. Later, you can copy and paste this information to other applications.

### Activating the Memo Pad

Push the Memo Pad button on the front panel of the PalmPilot connected organizer. The screen will change to display the Memo Pad screen.



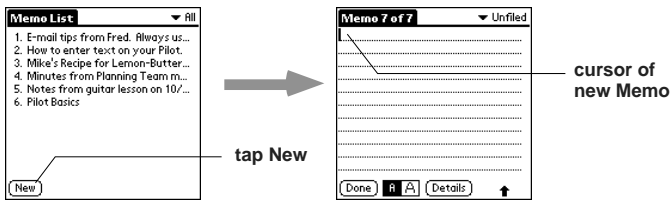
*Note:* When working with the Memo Pad, you can immediately change to any other application (Address Book, etc.) of your PalmPilot by using the front panel buttons. Any work you have done with the Memo Pad will be saved, and will reappear when you return.

## Working with Memos

A memo is the screen of your PalmPilot where you enter, review, and modify the individual entries of the Memo Pad. A memo can contain up to four-thousand characters; the number of memos you can store is dependent only on the memory available in your PalmPilot.

### *To create a new memo:*

1. With the Memo Pad application running on your PalmPilot, tap the New button, as shown in the following diagram:



*Note:* In the Memo List screen, you can also begin writing in the Graffiti<sup>®</sup> writing area to create a new memo. The first letter will begin your new memo, and will automatically be capitalized.

2. The new memo appears on screen. A cursor is displayed at the upper-left of the memo, representing the point where new text will appear.
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. When you are finished, tap the Done button to return to the Memo List screen.

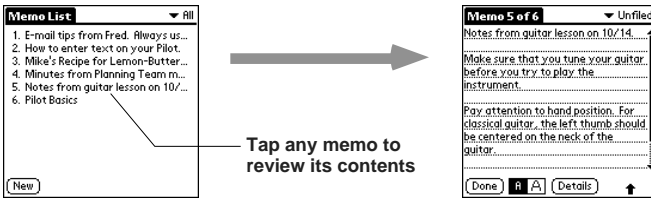
Each time you create a new memo, the first line of text from the memo page appears in the Memo List. This makes it easy to locate and review any of your memos.

### Reviewing Memos

All of the memos that you create appear in the Memo List screen.

#### *To review the contents of a memo:*

1. Tap the text of the memo that appears in the Memo List screen. The memo appears on the screen, as shown in the following diagram:



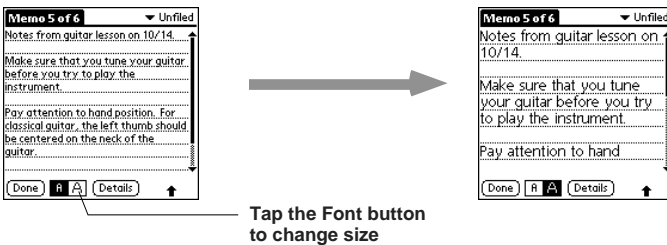
2. You can now view or edit the text in the memo. Tap the Done button to save your changes to the memo, and return to the Memo List screen.

### Memo Font Size

When working with a memo, you have the option of changing the screen display to show a larger font (text) size.

#### *To change the memo font size:*

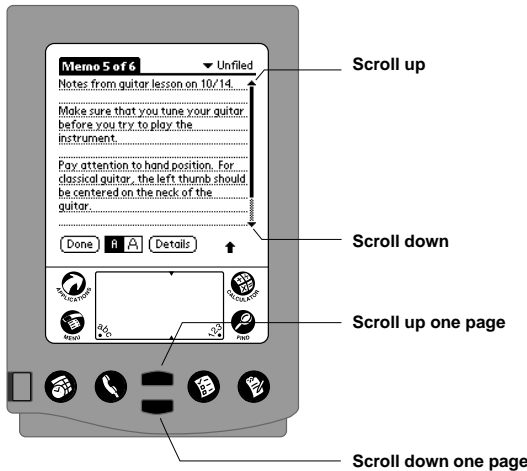
- With the memo displayed on the screen, tap the Font button, as shown in the following diagram:



Tap the Font button again to revert to the normal size font in the memo. The font size that you select will be used when viewing all memos.

### Scroll Arrows

If you create a memo that has more text than will fit on the screen, scroll arrows appear. These arrows enable you to scroll up or down to review the entire contents of the memo, as shown in the following diagram:



Note that the up and down scroll buttons on the front panel of your PalmPilot move the memo a page at a time, and can be used to review the contents of a long memo.

### Arranging Memos

The Memo Preferences dialog enables you to sort your memos alphabetically, or to rearrange your memos so they appear in any order that you want.

## *To activate the Memo Preferences dialog:*

1. In the Memo List view, tap the Menus button, and then tap Preferences in the Options menu. The Memo Preferences dialog appears, as shown in the following diagram:



2. Tap the Sort by pick list. Choose Manual or Alphabetic (memos sorted alphabetically).
3. Tap the OK button to close the Memo Preferences dialog and activate your setting.

## *Rearranging the Memo List*

If you choose the Manual option for the Sort by setting, you can manually rearrange the order of the memos in the Memo List view.

## *To rearrange the order of your memos:*

- In the Memo List view, tap and drag the memo to a new location in the list. When you lift the stylus from the PalmPilot organizer's screen, the memo appears in its new location.

When you rearrange the order of your memos, all memos are renumbered to reflect the new order.

*Note:* You cannot rearrange the order of your memos if the Sort by Alphabetic option is activated in the Memo Preferences dialog. Also, the Manual setting of the Memo Preferences is not transferred to PalmPilot Desktop. If you choose to view your memos alphabetically on PalmPilot Desktop and then perform a HotSync operation, the arrangement of the memos on the PalmPilot will still be in the order defined in the Memo Preferences setting.



## Choosing a Memo Category

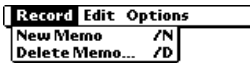
Categories are used to file individual memos items into groups for easy review. You can assign and edit categories by using the Categories pick list (in the upper-right corner of the screen), or in the Details dialog (refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for a complete description of categories).

## Memo Pad Menu Commands

The Memo Pad includes menu commands to make it fast and easy to perform common file and editing tasks. Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about menu commands that are common to all PalmPilot applications.

### Record Menu

When you select the Record menu, its menu commands appear on screen as shown in the following diagram:



- **New Memo.** The New Memo command creates a new memo.
- **Delete Memo.** The Delete Memo command will display an alert dialog, prompting you to confirm that you want to delete the current memo. If you tap the OK button, the memo is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the memo.

The default setting for the Delete Memo alert is to “Save archive copy on PC.” This will remove the memo from the Memo List, but retain a copy of the memo and transfer it to an archive file on your desktop computer the next time you perform a HotSync operation.

## Options Menu

When you select the Options menu, its menu commands appear on screen as shown in the following diagram:

Record	Edit	Options
	Go to Top of Page	/T
	Go to Bottom of Page	/B
	Phone Lookup	/L
	About Memo Pad	

- **Go to top of page.** This command causes the screen display to immediately move to the top (first) line of the memo.
- **Go to bottom of page.** This command causes the screen display to immediately move to the bottom (last) line of the memo.
- **Phone Lookup.** The Phone Lookup command activates the Phone Lookup feature, which is described in Chapter 8: *Additional Features*.
- **About Memo Pad.** The About Memo Pad command shows version (revision) information about the Memo Pad.
- **Preferences (Memo List view only).** The Preferences command activates the Memo Preferences dialog, and enables you to define the sort order for your memos.

## Deleting a Memo

There are three ways to delete a memo: simply delete the text of the memo, use the Menu Command (as described in the Record Menu), or use the Memo Details dialog.

### *To delete a memo with the Memo Details dialog:*

1. Tap the memo that you want to delete. The memo appears on the screen.
2. Tap the Details button. The Memo Details dialog appears.

3. Tap the Delete button. The Delete Memo alert appears.
4. Tap the OK button to confirm that you want to delete the currently selected memo.

## Chapter 7

# Expense



The Expense application enables you to keep track of your expenses, and then transfer the information to a spreadsheet on your desktop computer.

*With the Expense application you can:*

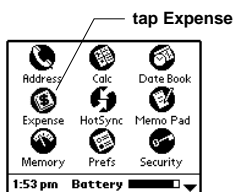
- Record dates, type of expenses, amount spent, payment method and other details associated with any money that you spend.
- Create categories for your expenses, such as business, personal, expenses associated with a trip, or expenses associated with a range of dates.
- Keep track of vendors (companies), and people involved with each particular expense.
- Log miles traveled for a particular date or expense category.
- Sort your expenses, either by date or expense type.
- Transfer your expense information to a Microsoft Excel spreadsheet in your desktop PC. (Microsoft Excel version 5.0 or later is required. It is *not* included with the PalmPilot package.)

*Note:* The Expense feature is not included in PalmPilot™ Desktop software for the Macintosh computer.

## Activating Expense



1. Tap the Applications button on the PalmPilot screen. The Application picker appears, as shown in the following diagram:

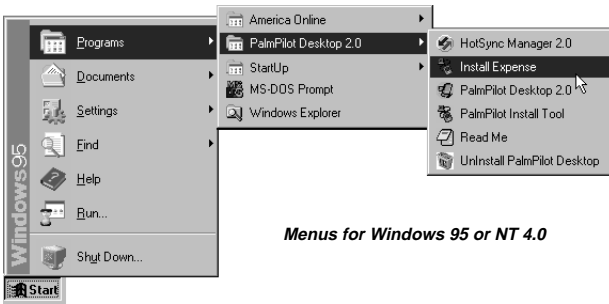


2. Tap the Expense icon. The Expense application starts and the Expense screen appears.

*Note:* If the Expense icon does not appear in the Application picker, you will have to install the Expense application on your PalmPilot organizer.

### *To install the Expense application on your PalmPilot:*

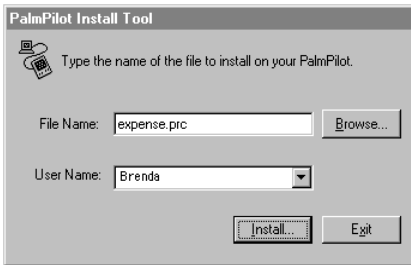
1. Install the PalmPilot Desktop software on your PC as described in Chapter 9: *Installing PalmPilot™ Desktop Software*.
2. Perform a HotSync™ operation on your PalmPilot, as described in Chapter 10: *HotSync™ Technology*.
3. Click the Start button on your PC, move to the Programs command, and then move to select the Install Expense from the PalmPilot Desktop 2.0 group, as shown in the following diagram:



*Menus for Windows 95 or NT 4.0*

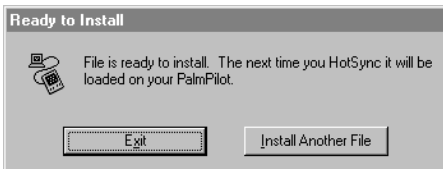
If you are using Windows 3.1x, open the PalmPilot Desktop program group, and double-click the Install Expense icon.

4. The PalmPilot Install Tool dialog appears, as shown in the following diagram:



If necessary, choose the name associated with your PalmPilot in the User Name area.

5. Click the Install button. The Ready to install dialog appears, as shown in the following diagram:



6. Click the Exit button. This confirms that the Expense application is ready to install on your PalmPilot.

7. Perform a HotSync operation on your PalmPilot to install the Expense application.

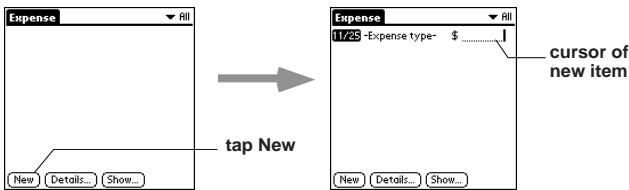
At this point, the Expense application is installed on your PalmPilot and appears in the Application picker. Tap the Expense icon to start the Expense application.

## Creating an Expense Item

Expense enables you to record the date, expense type, and the amount that you spent. You can sort your expense items into categories, or add other information that you want to associate with the item.

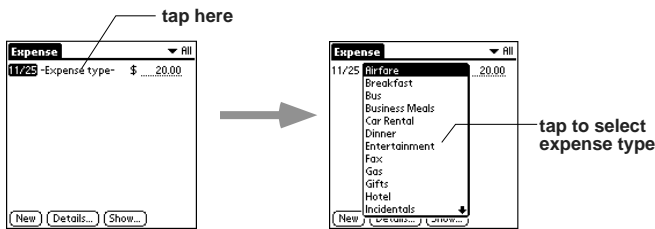
*To create an expense item:*

1. With the Expense application running on your PalmPilot, tap the New button, as shown in the following diagram:



*Note:* In the Expense List screen, you can also create a new expense item by writing on the number side of the Graffiti writing area. The first number you write will begin your new expense item.

2. Use Graffiti<sup>®</sup> strokes (or the on-screen keyboard) to enter the amount of the expense.
3. Tap the Expense Type, and a pick list appears. Then tap to select a type from the list as shown in the following diagram:



At this point, your expense item entry is saved. You can change the expense amount or type at any time. If you do not select an expense type, the entry will *not* be saved.

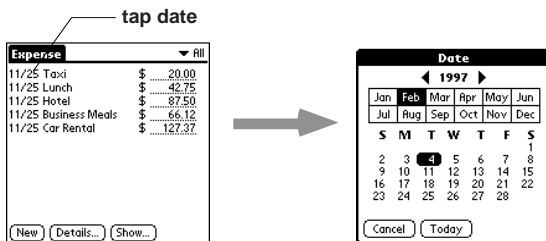
*Tip:* A quick way to create a new Expense item is to make sure that no expense item is selected in the Expense List, write the first letter(s) of the expense type, and then write the numerical amount of the expense item. This technique takes advantage of the Expense application's Quickfill option. For more information about Quickfill, refer to the section entitled "Options Menu" that appears later in this chapter.

### Expense Item Date

Expense items appear in the list with the date that they were entered on your PalmPilot. The Expense application offers you the ability to change the date associated with any expense item.

#### *To change the date of an expense item:*

1. Tap to select the expense item you want to change. The date appears highlighted.
2. Tap the date of the selected item. The Date dialog appears, as shown in the following diagram:





3. Tap to select the date you want for the expense item.

For more information about the features of the Date dialog, refer to the section entitled “Choosing a Date” that appears in Chapter 3: *Date Book*.

## Receipt Details

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

### *To activate the Receipt Details dialog:*

1. Tap the expense item (if it is not already selected).

**Details...**

2. Tap the Details button. The Receipt Details dialog appears, as shown in the following diagram:



The screenshot shows a dialog box titled "Receipt Details". It contains several fields with dropdown menus and text input fields. The fields are: "Category" (set to "Unfiled"), "Type" (set to "Car Rental"), "Payment" (set to "Unfiled"), "Currency" (set to "\$"), "Vendor" (empty), "City" (empty), and "Attendees" (set to "Who..."). At the bottom, there are four buttons: "OK", "Cancel", "Delete", and "Note", followed by an upward-pointing arrow.

The following sections describe the features and settings that are available in the Receipt Details dialog.

### *Category*

The Category pick list enables you to choose the category for the expense item. The default Category setting is Unfiled when “All” is selected. Otherwise, the default is the currently selected Category. An expense item remains in the default category until you choose to change it in the Receipt Details dialog.

Two default categories are provided, New York and Paris, as examples of how you might sort your expenses according to different business trips.

You may also choose Edit Categories from the pick list to change the names of the categories, or create your own new expense categories. For example, you may create a category for a range of dates, such as a week or month. You may also delete or rename the New York, Paris or other categories.

### *Type*

The Type pick list displays the same expense type options that appear in the Expense List screen. You can use this pick list to change the expense type for any of your Expense items.

### *Payment*

The Payment pick list enables you to choose the payment method used to pay the expense item. Click the pick list, and choose the method of payment that corresponds to the expense item. If the item is prepaid (such as airline tickets supplied by your company), you can choose that option from the list.

Choosing Prepaid will cause your expense to be recorded in the appropriate company-paid cell of your final printed expense report spreadsheet. Refer to the section entitled “Transferring Your Data to Microsoft Excel” that appears later in this chapter.

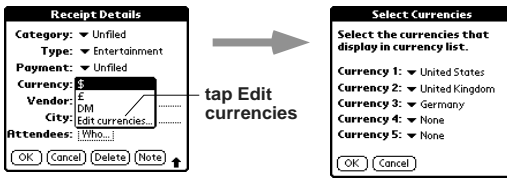
### *Currency*

The Currency pick list enables you to choose the type of currency used to pay the expense item. The default unit of currency is defined by the Preferences command (described later in this chapter).

The Currency pick list can display up to four other common types of currency. You can customize any or all four of these selections, as described in the following procedure.

### *To customize the types of currency that appear in the Currency pick list:*

1. In the Receipt Details dialog, tap the Currencies pick list, and then tap the Edit Currencies selection. The Select Currencies dialog appears, as shown in the following diagram:



2. The Select Currencies dialog includes a pick list for each of the five types of currency. Tap each pick list to choose the country whose currency you want to display.
3. Tap the OK button to close the Select Currencies dialog and activate your selections.

*Note:* If the currency you want to use is not represented by the available list of countries, you can create your own custom country and currency symbol. Refer to the section entitled “Expense Menu Commands” that appears in the next section.

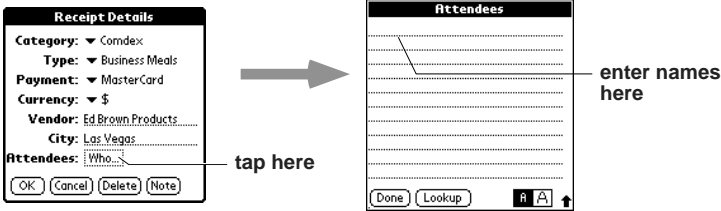
### *Vendor and City*

The Vendor and City areas enable you to record the name of the vendor (usually, a company) associated with the expense, and the city where the expense took place. For example, a business lunch might be at the Sunnyside Restaurant (Vendor) in San Francisco (City).

### *Attendees*

The Attendees button activates the Attendees screen, that enables you to list the people who attended the activity associated with the expense. You can also use this space for notes, such as the purpose of the expense.

The Attendees screen resembles a memo in the Memo Pad application, as shown in the following diagram:



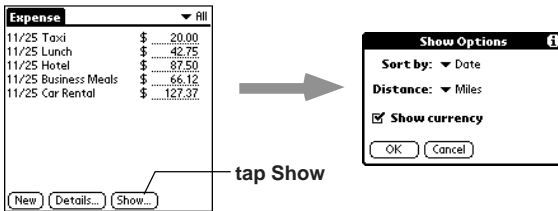
The Attendees screen also includes the Lookup button. Tap this button to display the list of people's names (and their corresponding companies) stored in PalmPilot organizer's Address Book. The Lookup button's function is similar to the Phone Lookup feature described in Chapter 8: *Additional Features*.

## Show Options

The Expense application allows you to define the sort order and other settings that relate to your expense items.

*To activate the Show Options dialog:*

- In the Expense List screen, tap the Show button. The Show Options dialog appears, as shown in the following diagram:



## Sort By

The Sort by pick list enables you to sort the entries in the Expense application, either by date or by expense type.

## Distance

The Distance pick list enables you to display units in miles or kilometers.

*Note:* This setting only applies to expense items that have “Mileage” set as the expense type. The Mileage expense type enables you to keep track of the number of miles traveled on a certain date, or for a certain function.

### **Show Currency**

This setting shows or hides the currency symbol in the expense list.

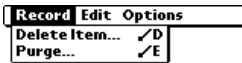
## **Expense Menu Commands**

The Expense application includes menu commands to perform common file and editing tasks. This section explains the menu commands that are specific to the Expense application.

Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about menu commands that are common to all of your PalmPilot applications.

### **Record Menu**

When you select the Record menu, its menu command appears on screen as shown in the following diagram:



- **Delete Item.** The Delete Item command displays an alert dialog, prompting you to confirm that you want to delete the current expense item. You must tap to select an item before you can use the Delete Item command. If you tap the OK button, the item is deleted from the memory of your PalmPilot. If you tap the Cancel button, the alert dialog closes and you are returned to the Expense screen.

The default setting for the Delete Item alert is to “Save archive copy on PC.” This will remove the item from the Expense application, but retain a copy of the item and transfer it to an archive file on your desktop computer the next time you perform a HotSync operation.

- **Purge.** The Purge command is used to conserve memory on your PalmPilot by deleting expense categories that you no longer use.

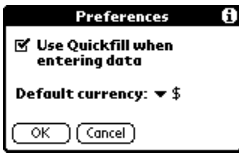
The Purge command displays an alert dialog, prompting you to confirm that you want to purge all the records from the selected category.

### Options Menu

When you select the Options menu, its menu commands appear on screen as shown in the following diagram:



- **Preferences.** The Preferences command activates the Preferences dialog, which is used to activate the Quickfill feature and set the default currency symbol.



- **Use Quickfill.** The Quickfill feature enables you to select an expense type by writing Graffiti characters in the Graffiti writing area. With Quickfill activated, writing a letter automatically selects the first expense type (alphabetically) associated with that letter.

For example, if you write the letter “T,” Quickfill automatically fills in the “Taxi” expense type. Writing “T” and then the letter “E” fills the first expense type beginning with the letters “TE,” which is telephone.

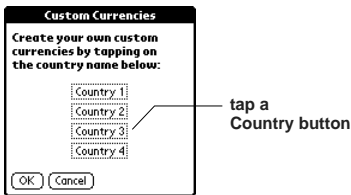
*Note:* You can use the Quickfill feature to begin a new expense item. If no expense item is selected and you begin writing letters in the Graffiti writing area, a new expense item is created with the expense category selected based on your writing.

- **Default currency.** This pick list sets the default currency symbol displayed in the Expense application. All other currencies are shown by their unique currency symbols.
- **Custom Currencies.** The Custom Currencies command allows you to define additional currency symbols used by the Expense application.

*Note:* You only need to use this command if the currency symbol you need is not available in the Currency pick list of the Receipt Details dialog (explained earlier in this chapter).

*To define a custom currency symbol:*

1. Choose Custom Currencies from the Options menu. The Custom Currencies dialog appears:



2. Tap one of the four Country buttons. The Currency Properties dialog appears, as shown in the following diagram:



3. Use Graffiti strokes to enter the name of the country associated with the currency symbol, and the symbol that you want to appear in the Expense application. Tap the OK button to define your setting.
4. Tap the OK button to close the Custom Currencies dialog.

If you want your custom currency symbol to be the default for all Expense entries, choose the symbol in the Preferences dialog.

If you want your custom currency symbol to only be used for particular expense items, choose the symbol in the Receipt Details dialog associated with those items.

## Transferring Your Data to Microsoft Excel

Once you have entered expense data into the Expense application of your PalmPilot, the PalmPilot Desktop software enables you to view and print your the data with your PC.

*Note:* Microsoft Excel version 5.0 (or later) is required to view and print your Expense data using one of the provided templates. Microsoft Excel is *not* included with the PalmPilot package.

*Note:* The procedure steps that appear in this section assume that you have installed the PalmPilot Desktop software, installed the Expense application in your PalmPilot (if necessary), and have performed a HotSync operation to synchronize your Expense data with PalmPilot Desktop. Refer to Chapter 9: *Installing PalmPilot™ Desktop Software* and Chapter 10: *HotSync™ Technology* for more information.

### *Using Expense Report Templates*

You may choose one of the templates that are provided for your Expense data. This gives you the flexibility to edit and manipulate your Expense data in Microsoft Excel.

You can also make changes to the Expense templates that are provided with the PalmPilot Desktop software. For example, you can add your company name on each of the templates. An illustration of each of the available templates appears in Appendix B: *Expense Templates*. Details on how to make changes to the templates appears in Appendix C: *Creating a Custom Expense Report*.

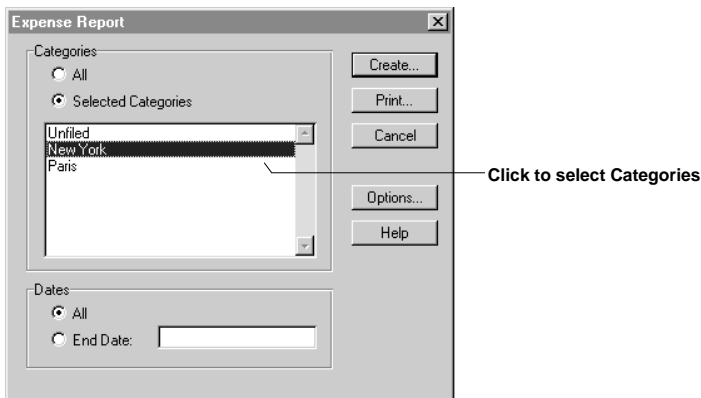


## To view your Expense data as an expense report in Microsoft Excel:

1. Perform a HotSync operation. This transfers your latest Expense data to your PC, and makes it available to PalmPilot Desktop.



2. Click the Expense button. The Microsoft Excel application automatically starts and the Expense Report configuration dialog appears, as shown in the following diagram:



*Note:* If you are using Windows 3.1x or launching Expense from the Start menu (instead of PalmPilot Desktop), you must first choose the user name that corresponds to your PalmPilot.

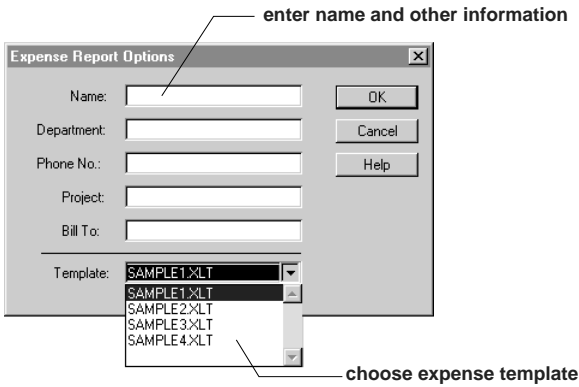
3. Click to select the expense category that you want to use. The category appears highlighted.

You can shift+click to select multiple categories. If you want to view the expenses associated with *all* of your Expense categories, click the All button in the Categories area.

4. If you want to define an end date for the expense report, enter the date in the End Date area.

*Note:* If you do not specify an end date, *all* expense entries for the selected categories will appear — up to the date of the last HotSync with PalmPilot.

5. Click the Options button. The Expense Report Options dialog appears, as shown in the following diagram:



6. Enter name, department and other information as necessary for your expense report.
7. Click the Templates menu, and click to choose an expense template. Samples of the available expense templates appear in Appendix B: *Expense Templates*.

*Note:* If you want to create your own custom expense template and have it appear in the Templates menu, refer to Appendix C: *Creating a Custom Expense Report*.

8. Click the OK button. You are returned to the Expense Report Options dialog.
9. Click the Create button. Your expense data is opened in a Microsoft Excel spreadsheet, and filled in the appropriate rows and columns for the template you selected in step #7 as shown in the following diagram:

	A	B	C	D	F	H	J	L	N	P	R	T	V	X	Y
1	SAMPLE 21														
2	<b>Travel Expense Report</b>														
3	Employee name			Employee number			Dept. number			Date					
4										1/9/97					
5	Purpose												Bill to		
6															
7															
8	Date:	2/9/96	2/10/96	2/11/96	2/12/96	2/13/96	2/14/96	2/15/96	2/16/96	2/17/96	TOTAL				
9	Bill to:											TOTAL			
10															
11	<b>LODGING</b>														
12	Hotel	97.50													\$97.50
13	Laundry														\$10.00
14	Tips	10.00													\$10.00
15	Lodging total	107.50													\$107.50
16															
17	<b>MEALS</b>														
18	Breakfast	12.70													\$12.70
19	Lunch	7.50													\$7.50
20	Dinner	24.90													\$24.90
21	Meals total	45.10													\$45.10
22															
23	<b>BUSINESS</b>														
24	Business meals														
25	Conference														
26	Entertainment														
27	Business total														
28															
29	<b>TRANSPORTATION</b>														
30	Airfare	257.12													\$257.12
31	Auto Rental	59.17													\$59.17
32	Auto Maint./Gas	17.30													\$17.30
33	Local Trans.														
34	Tolls/Parking	10.00													\$10.00
35	Miles @ \$0.29 / mile														
36	Trans. total	343.59													\$343.59
37															
38															

At this point, your expense data appears in the familiar Microsoft Excel spreadsheet form. You may enter additional information in any cell, make other changes to the formatting of the spreadsheet, save the file in any directory, and print the file in the normal manner.

### Expense Templates

Four different expense templates are provided with PalmPilot Desktop. Choose the template that is most convenient for your needs. Illustrations of the expense templates appears in Appendix B: *Expense Templates*.

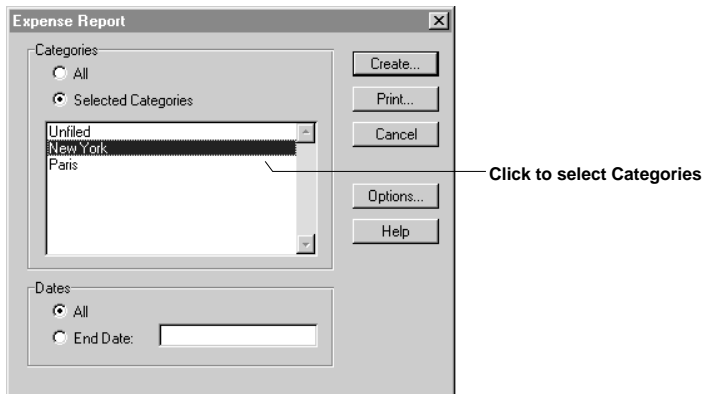
If you want to create your own custom expense template, refer to Appendix C: *Creating a Custom Expense Report*.

## Printing an Expense Report

PalmPilot Desktop makes it quick and easy to print your Expense data.

*To print your expense report:*

1. In the Expense Report dialog, click to select the expense category that you want to print. The category appears highlighted.



You can shift+click to select multiple categories. If you want to print the expenses associated with all of your Expense categories, click the All button in the Categories area.

2. If you want to define an end date for the expense report, enter the date in the End Date area.

*Note:* If you do not specify an end date, all expense entries for the selected categories will appear — up to the date of the last HotSync with PalmPilot.

3. Click the Print button. The Microsoft Excel application starts, creates an expense report, and displays it in the Print Preview window, as shown in the following diagram:





## Chapter 8

### Additional Features



Your PalmPilot™ connected organizer contains additional features that make it faster, easier and more convenient to use.

### Find Command

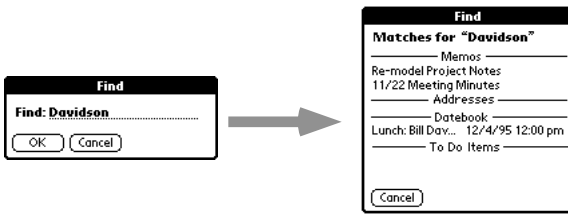
The Find command is available in any PalmPilot application, and will locate any text that you specify. The text you enter for your search can be whole words, or the beginning letters of a word. The Find command automatically searches all the data stored on your PalmPilot organizer, and lists which applications contain the text.

For example, suppose that you want to find a particular name, but aren't sure where you stored it. The Find command immediately lists all instances of that name, and enables you to jump directly to the location of the name.

#### *To use the Find command:*



1. From any application running on your PalmPilot, tap the Find button. The Find dialog appears.
2. Enter the text that you want to find in your PalmPilot.
3. Tap the OK button. Your PalmPilot finds all instances of the text that you specified, and lists them in a dialog, as shown in the following diagram:



As PalmPilot searches for the text, you can tap the Stop button at any time. You may want to do this if you have a large number of matching entries entered on your PalmPilot, and the one you want is already displayed. To continue the search, tap the Find More button.

4. Tap the text of the record that you want to review. The file or record that you selected, and its corresponding PalmPilot application appear on the screen.

*Note:* If you select text in a PalmPilot application (so it is highlighted in black) before you tap the Find button, the selected text automatically appears in the Find dialog.

The Find command is *not* case-sensitive. In other words, searching for the name "davidson" will also find "Davidson." The Find command will also search the contents of notes.

## Phone Lookup

In addition to the Find feature for locating text in your PalmPilot, you can search for and display phone numbers with the Phone Lookup menu command. Once you have found a phone number, you can paste it directly into a PalmPilot application.

For example, if you want to include a phone number in a memo, you could use the Phone Lookup feature to find the phone number, and then transfer it directly into the memo.

### *To use the Phone Lookup command:*

1. Open the record where you want to insert a phone number. This can be an event in the Date Book, a To Do List Item, or a memo in the Memo Pad application.



2. Tap the Menus button. The menus for your application appear at the top of the screen.
3. Tap the Options menu, and tap the Phone Lookup command. The Phone Number Lookup screen appears, as shown in the following diagram:



4. From the list of phone numbers, tap to select the phone number you want to use. The phone number will appear highlighted.

*Note:* If you have a large number of phone numbers stored in your PalmPilot, you can use the Look Up feature at the bottom of the screen. Enter the first letter of the name you want to look up, and the list automatically scrolls to the first name that starts with that letter. You can continue to add letters to narrow your Look Up search.

5. Tap the Add button. The Phone Number Lookup screen closes, and the name and phone number you selected are automatically pasted into the record.

*Note:* You can also use the Graffiti® command-stroke, /L, to activate the Phone Lookup feature. The Phone Lookup feature is not available in the Address Book and Expense applications.

### Phone Lookup Tips

- You can use the Phone Lookup feature during the course of text entry. For example, suppose you want to insert the full name and phone number for someone with the last name “Williams.” In this case, you could write the Graffiti characters for “Wi,” and then the Phone Lookup command stroke “/L.”

Assuming you only have one Address Book entry that begins

with “Wi,” the full name for “Williams” (and the corresponding phone number) will be inserted. If you have more than one name that begins with “Wi,” the Phone Lookup screen appears.

- The Phone Lookup feature will also work for selected text. Drag to highlight the text, and then write the Phone Lookup command stroke “/L.” The name that is found will replace the selected text.
- These tips function in all applications that support the Phone Lookup command: the Date Book, To Do List, or Memo Pad.

## PalmPilot Calculator



Tap the Calculator button on the PalmPilot screen. The screen changes to show the Calculator screen.

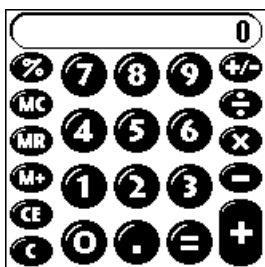
*Note:* When working with the Calculator, you can immediately change to any other application (Address Book, etc.) of your PalmPilot by using the front panel buttons. Any numbers or calculations you have performed will be saved, and will reappear when you return.

### *Using the Calculator Screen*

The Calculator is designed with onscreen “buttons” that are large enough to be pressed with your fingertips.

### *To use the Calculator screen:*

- Use your fingers to press directly on the Calculator buttons that appear on the screen, as shown in the following diagram:



*Note:* You may also use the stylus to tap the numbers and function buttons of the Calculator screen.

### *Clear and Clear Entry*

The Clear and Clear Entry buttons are used to clear numbers from the Calculator, as described below:

- **Clear Entry.** The Clear Entry (CE) button clears the last number that you entered. This button is used if you make a mistake while entering a number in the middle of a calculation. Pressing the Clear Entry button will allow you to re-enter the number without having to start the calculation over.
- **Clear.** The Clear (C) button clears the entire calculation, and enables you to begin a fresh calculation.

### *Negative/Positive Numbers*

The +/- button is used to toggle the currently displayed number between a negative and positive value. If you want to enter a negative number, enter the number first *and then press* the +/- button.

### *Memory Store*

The Memory Store (M+) button places the currently displayed number into Memory. Each new number entered with the M+ button is *added to the total* already stored in memory. The number that you add can either be a calculated value, or any number that you enter by pressing the number buttons.

Note that pressing the Memory Store button has no effect on the current calculation (or series of calculations); it merely places the value into memory until it is recalled. The Memory feature makes it easy to perform a series of calculations based on some specific number that can be recalled whenever you're working with the Calculator.

### ***Memory Recall***

The Memory Recall button summons the value from memory, and inserts it in the current calculation.

### ***Memory Clear***

The Memory Clear button removes any value that is stored in the memory of the Calculator.

### ***Calculator Menu Commands***

The Calculator supports the Copy and Paste commands, which enable you to copy a calculated value and paste it in another application on your PalmPilot.

When you choose the Copy command, the numerical value is copied to the clipboard of your PalmPilot.

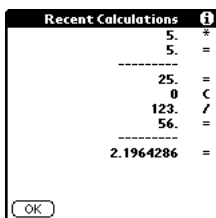
If you copy a number from another application (e.g., the Memo Pad), the Paste command enters the number into the Calculator. You cannot Paste text into the Calculator.

### ***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 the recent calculations:***

1. Tap the menu icon, and choose the Options menu.
2. Tap Recent Calculations. The Recent Calculations screen appears, as shown in the following diagram:



- When you have finished reviewing the dialog, tap the OK button to close the Recent Calculations dialog, and return to the Calculator.

## Memory Application

The Memory application appears in the Application picker, and displays the memory available in your PalmPilot, and how the memory is currently being used.

### *To use the Memory application:*

- Start the Application picker.



Memory

- Tap the Memory icon. The Memory screen appears, as shown in the following diagram:



The Memory screen initially shows the *size* of the applications loaded in your PalmPilot. Tap the Records button to show the number of records stored in each application.

*Note:* Some memory is always used by PalmPilot organizer's internal operating system. The Memory screen shows how much memory is available.

## *Deleting Applications*

The Memory application is also used to delete applications that you have installed in your PalmPilot.

### *To delete an application that you have installed:*

1. Tap the Delete apps button. A list of the additional applications appears.
2. In the list of applications, tap to select the application that you want to delete. The application will be highlighted (in black).
3. Tap the Delete button. An alert appears, prompting you to confirm that you want to delete the application.
4. Tap the Yes button to delete the application. The application list reappears, showing that the application has been deleted.
5. When you are finished, tap the Done button to return to the Memory application.

*Note:* You cannot delete the Date Book, Address Book, To Do List, Memo Pad, or Calculator applications from your PalmPilot. These applications are permanently stored in the memory of the PalmPilot.

## Security System

Your PalmPilot is equipped with a Security application, so that unauthorized users will not be able to view the records that you wish to protect. The Security application provides two levels of security:

- **Hide Private records.** Any or all of the record entries can be set as “Private.” The Security application can be set to hide these private records so they cannot be viewed unless the correct password is entered.

Note that you can hide private records with or without a password set. Without a password, private records are hidden

until you set the Security application to show them. With a password set, the password is required to view private records.

- **PalmPilot Lock.** You can also set the Security application to turn off and lock the PalmPilot. In this case, the PalmPilot will not operate until the correct password has been entered.

### *To start the Security application:*

1. Tap the Applications button. The Application picker appears.

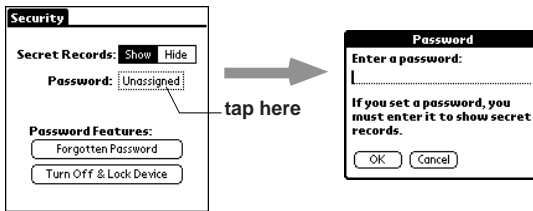


2. Tap the Security icon. The Security screen appears.

### *Assigning a Password*

#### *To assign a password:*

1. With the Security application running, tap the password (if no password is assigned, tap the word “Unassigned”). The password dialog appears, as shown in the following diagram:



2. Enter the password that you want for your PalmPilot.
3. Tap the OK button. A dialog appears, prompting you to verify the password.
4. Enter the *same* password a second time, and tap the OK button.

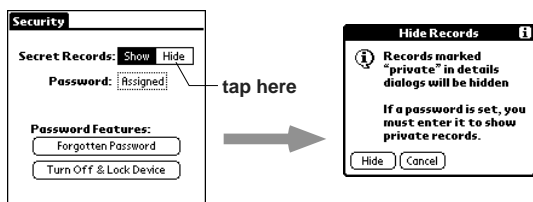
At this point, you have assigned the password that will be used to activate the Security features of your PalmPilot. The Security screen changes to show that a password is assigned.

## Hiding Private Records

You can hide the records and entries that you have marked as private. If you have assigned a password, it will be required to show records and entries you have marked as private.

### To hide Private records:

1. Tap the Hide button. The Hide Records dialog appears, as shown in the following diagram:



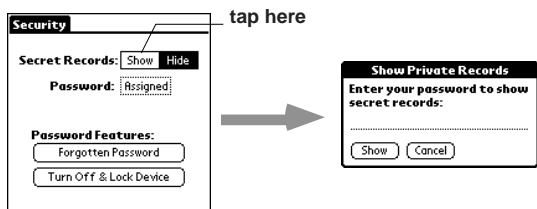
2. Tap the Hide button. The Hide Records dialog closes. All records and entries marked as Private will not appear in any application on your PalmPilot. Note that the records and entries are not deleted by the Hide button; they are merely hidden.

## Showing Private Records

When you have hidden Private records and entries, you can use the Security application to once again display the Private records.

### To show Private records:

1. With Hide Private Records activated, tap the Show button. If you have assigned a password the Show Private Records dialog appears, as shown in the following diagram:





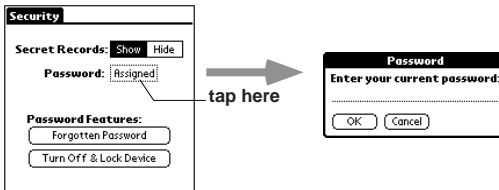
2. Enter your password.
3. Tap the Show button. The Show Private Records dialog closes. All records and entries marked as Private will be visible in their respective PalmPilot applications.

### *Changing or Deleting a Password*

Once you have defined a password for your PalmPilot, you can change or delete it at any time. You must enter the current password before it can be changed or deleted.

### *To change or delete your password:*

1. With a password assigned, tap the Assigned button. The Password dialog appears, as shown in the following diagram:



2. Enter the current password.
3. Tap the OK button. The Password dialog changes to prompt you for a new password, as shown in the following diagram:



4. Enter the new password, and tap the OK button. If you want to delete the password, tap the Delete button.

### *Forgotten Password*

If you forget the password that you have assigned, you can choose to have the password deleted from your PalmPilot. Deleting a forgotten password will also delete all records and files marked as Private.

*Important:* If you synchronize the data between your PalmPilot and your desktop computer before deleting a forgotten password, your private records will be restored the next time you perform a HotSync™ operation. The password will not be restored.

*To delete a forgotten password:*

1. Tap the Forgotten Password button. If you have a password assigned, the Delete Password dialog appears.
2. Tap the Yes button to delete the password, as well as all records and entries marked “Private.”

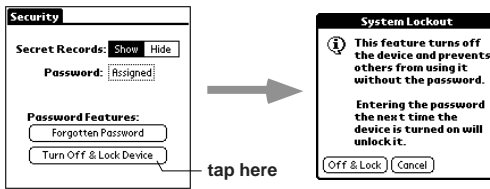
***PalmPilot Lock***

You can also use the password to lock the PalmPilot, so the password is required before the unit will operate.

*To lock the PalmPilot with a password:*

1. Use the HotSync application to synchronize the data between your PalmPilot unit and your desktop computer. Refer to the *PalmPilot Desktop Handbook* for information about how to use the HotSync application.

2. Tap the Turn Off & Lock Device button. If you have a password assigned, the System Lockout dialog appears, as shown in the following diagram:



3. Tap the Off & Lock button. The power for your PalmPilot turns off.
4. The next time you start your PalmPilot, you will be prompted for the password. There will be no access to any of your PalmPilot organizer's records or applications until the correct password has been entered.

*Important:* If you lock the PalmPilot as described in the previous procedure, you will need to enter the exact password to re-activate the PalmPilot. Should you forget the password, you will have to use the PalmPilot organizer's reset button to resume using the unit. Performing a hard reset with the reset button will delete all the records and entries in your PalmPilot; however, all synchronized data will be restored at the next HotSync. For information about how to use the reset button, refer to Chapter 12: *Reference*.

## Graffiti® ShortCuts

Graffiti's ShortCuts make entering commonly-used words or phrases quick and easy. ShortCuts is similar to the Glossary or Autotext features of some word processors.

You can assign up to 45 characters to a ShortCut. For example, you might create a ShortCut with your name, or headers for a memo.

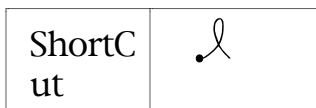
## Using a ShortCut

Your PalmPilot includes the following pre-defined Graffiti ShortCuts:

<i>Entry</i>	<i>ShortCut</i>	<i>Entry</i>	<i>ShortCut</i>
	<i>ut</i>		<i>ut</i>
Date stamp	<b>ds</b>	Breakfast	<b>br</b>
Time stamp	<b>ts</b>	Lunch	<b>lu</b>
Date / time stamp	<b>dts</b>	Dinner	<b>di</b>
Meeting	<b>me</b>		

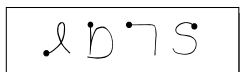
### To use a ShortCut,

1. Start any PalmPilot application, and tap to define an insertion point.
2. Draw the ShortCut stroke.



Graffiti responds with the ShortCut symbol at the insertion point to show that it is in ShortCut mode.

3. Write the characters that activate the ShortCut. For example, if you want to enter the current date and time, you would draw the following strokes:



If you want to cancel a Short Cut as you are entering one, you should use the backspace stroke:

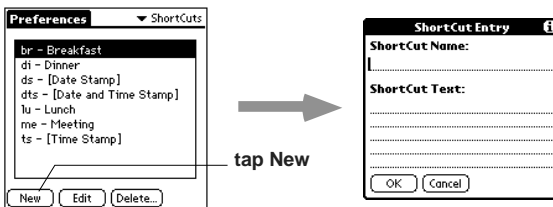


### *Creating a ShortCut*

You can create a ShortCut for any words, letters or numbers.

#### *To create a ShortCut:*

1. Tap the Applications button. The Application picker appears.
2. Tap the Prefs icon. The Preferences screen appears.
3. Tap the text that appears in the upper right corner of the Preferences screen. The pick list appears.
4. Tap ShortCuts. The ShortCuts Preferences screen appears.
5. Tap the New button. The ShortCut Entry dialog appears, as shown in the following diagram:



6. Enter the letters you want to use to activate the ShortCut.
7. Tap the ShortCut Text area of the ShortCut Entry dialog, and enter the text that you want to appear when the ShortCut is activated.

*Tip:* You may want to add a space (space character) after the last word in your ShortCut text. This way, the ShortCut text will automatically be followed by a space.

8. Tap the OK button to close the ShortCut Entry dialog and define your ShortCut.

At this point the ShortCut is defined, and appears in the list of ShortCuts. All ShortCuts are available in any of your PalmPilot applications, and are backed up on your desktop computer when you perform a HotSync.

### *Editing a ShortCut*

Once you have assigned a ShortCut, you can modify it at any time.

#### *To edit a ShortCut:*

1. In the ShortCuts Preferences screen, tap to select the ShortCut you want to edit.
2. Tap the Edit button. The ShortCut Entry dialog appears, with the ShortCut Name and ShortCut text displayed.
3. Make the changes that you want for the ShortCut, and tap the OK button.

### *Deleting a ShortCut*

If you no longer need a ShortCut that you have defined, you can delete it from the list of ShortCuts.

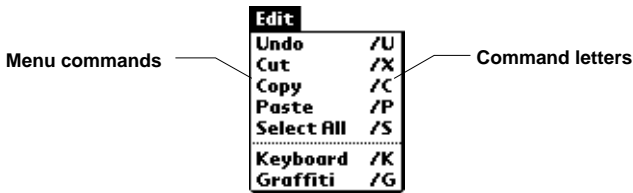
#### *To delete a ShortCut:*

1. In the ShortCuts Preferences screen, tap to select the ShortCut you want to delete.
2. Tap the Delete button. An alert appears, prompting you to confirm that you want to delete the ShortCut.

3. Tap the Yes button to delete your ShortCut.

## Menu Commands

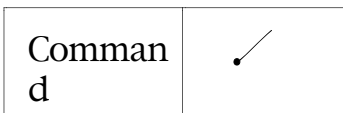
Menu commands for your PalmPilot applications have Graffiti “command stroke” equivalents, similar to command keys on desktop computers. Each command shows its corresponding command letter on the right side of the menu, as shown in the following diagram:



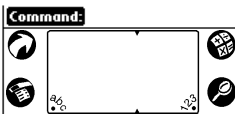
With the command stroke and the corresponding command letter, you can immediately activate the menu command without having to access the menu. For example, the previous diagram shows the Edit menu. As shown in the menu, the Select All command can be activated by drawing the Command stroke, followed by the letter “S.”

### *To use menu commands:*

1. Draw the Command stroke.



2. The Command indicator appears just above the Graffiti writing area, as shown in the following diagram:



3. Write the letter character that activates the menu command you want to use.

*Note:* The Command mode is active for approximately two seconds. You must immediately write the letter character to activate the menu command.






The menu command is invoked when you write the command letter. You do not have to tap the Menus button or access the menus when you use the Command stroke and command letters.

## Graffiti Strokes

In addition to text symbols, Graffiti includes special strokes that can be used to navigate within text, or the text fields of your PalmPilot applications.

### **Command**

### **Stroke**

Move cursor right	
Move cursor left	
Previous field (Address Book only)	
Next Field (Address Book only)	
Open Address Record (Address Book only)	



## Chapter 9

# Installing PalmPilot™ Desktop Software

This chapter explains how to install the PalmPilot Desktop software on your personal computer (PC). It also explains some of the features and capabilities of the PalmPilot Desktop software.

PalmPilot Desktop is supplied with comprehensive online documentation. Once you have installed the software, refer to the Help menu for complete information about how to use PalmPilot Desktop.

## About PalmPilot Desktop

PalmPilot Desktop provides features and capabilities for the PalmPilot™ connected organizer that let you:

- Work with your PalmPilot applications on your PC. PalmPilot Desktop duplicates the Date Book, Address Book, To Do List and Memo Pad applications of your PalmPilot, so you can view, enter and modify any data stored on your PalmPilot organizer.
- Back up the data stored on your PalmPilot organizer with HotSync™ synchronization technology and synchronize the data with PalmPilot Desktop. HotSync is a one-step procedure that ensures your data is always safe and up to date. For information about how to use the HotSync feature, refer to Chapter 10: *HotSync™ Technology*.
- Import and export data, so you can use existing database files as the basis of Address Book or Memo Pad entries.

- Print your PalmPilot Date Book, Address Book, To Do List and Memo Pad information on any Windows compatible printer.

## System Requirements

To install and operate PalmPilot Desktop, you need the following minimum equipment and allocations:

### *Minimum Requirements*

- Windows 3.1x, Windows 95 or Windows NT 4.0
- IBM compatible 386 PC or higher
- 8 MB RAM (memory) *minimum*, 16 MB recommended
- 10 MB available hard disk space for Windows 95 or Windows NT 4.0 (13 MB for Windows 3.1x)
- VGA monitor or better (the PalmPilot Tutorial requires a 256 color video system)
- CD-ROM drive  
(3.5" disks available upon request. Refer to Appendix A: *Technical Support, Service and Repair* for information.)
- Mouse
- One available serial port

***Important:*** PalmPilot Desktop 2.0 is designed for Windows 95 and Windows NT 4.0. If your computer is using Windows 3.1x, install PalmPilot Desktop v1.0 which is included on the PalmPilot CD-ROM.

### *Optional Equipment*

- Modem (such as PalmPilot Modem)
- Windows-compatible printer

## Software Installation

The following instructions will guide you through the installation of PalmPilot Desktop.

### *Installation Preparation*

To ensure a safe and uninterrupted installation of the PalmPilot Desktop software, please do the following:

- If you have placed your PalmPilot in the Cradle, remove it during software installation.
- Turn off background communications programs, such as WinFax or any software that polls the network or other devices, e.g. AS 400.
- Disable or turn off virus-protection software.
- Exit all Windows programs, including those run automatically at startup.
- If you are running Microsoft Office, exit the Office toolbar.
- Turn off any screen-saver software for the duration of the installation.
- If you are installing from floppy-disks (rather than the CD-ROM), make sure the original PalmPilot Desktop diskettes are write-protected, and then make backup copies of them. When you finish, use the copies to install the software, and store the original diskettes in a safe place. Refer to your computer's manual or Windows User Guide if you need information about locking or copying floppy diskettes.
- Do *not* simply copy the PalmPilot Desktop files to your hard drive. You must use the installer, which will move the files to your hard drive, install them in their proper locations, and decompress the files.

### *Installation using PalmPilot CD-ROM*

*To install PalmPilot Desktop from the CD-ROM disc:*

1. Exit any open Windows programs and disable any virus-scanning software.
2. Insert the PalmPilot Desktop CD-ROM into the computer's CD-ROM drive.

3. Choose Run from the Start menu. (With Windows 3.1x, choose Run from the File menu in the Program Manager.) The Run dialog box appears.
4. Enter d:Setup.exe (or x:Setup.exe, where *x* denotes the location of your CD-ROM drive) in the Run dialog box.
5. Click OK.
6. When the PalmPilot screen appears, click the Install button to begin the software installation.
7. A Welcome dialog appears, and prompts you to exit all Windows programs currently open before continuing with the installation. If you have any Windows programs open, exit those programs and continue. Read the warning message in the window and click the Next button.
8. Follow the remainder of the installation instructions that appear on the screen.

#### *Installation using PalmPilot Desktop 3.5" Diskettes*

##### *To install PalmPilot Desktop from 3.5" diskettes:*

1. Exit any open Windows programs and disable any virus-scanning software.
2. Insert the PalmPilot Desktop diskette labeled "Setup" into the diskette drive of your PC.
3. Choose Run from the Start menu. (With Windows 3.1x, choose Run from the File menu in the Program Manager.) The Run dialog box appears.
4. Enter a:Setup.exe (or x:Setup.exe, where *x* denotes the location of your diskette drive) in the Run dialog box.
5. Click OK.
6. A Welcome dialog appears, and prompts you to exit all Windows programs currently open before continuing with the installation. If you have any Windows programs open, exit

those programs and continue. Read the warning message in the window and click the Next button.

7. Follow the remainder of the installation instructions that appear on the screen.



## Chapter 10

# HotSync™ Technology



This chapter explains how to synchronize data between PalmPilot™ Desktop software and one or more PalmPilot connected organizers. To do so, the PalmPilot Desktop and PalmPilot are connected directly or with a modem. Two-way synchronization is achieved by use of HotSync™ technology.

### *HotSync will:*

- Synchronize the PalmPilot records with the records on the PC Desktop and vice versa.
- Enable a centralized computer to manage individual or multiple PalmPilot organizers.

## The HotSync Process and the HotSync Manager

HotSync is the process of automatically synchronizing data between the PalmPilot and PalmPilot Desktop. Changes you make on the PalmPilot or PalmPilot Desktop will be reflected on both platforms after a HotSync. HotSync only synchronizes the needed portions of files, thus reducing HotSync time.

The HotSync Manager oversees the process, which can be accomplished directly with the PalmPilot organizer's Cradle or with a modem. The HotSync Manager runs in the background, monitoring a communications port on the PC, "listening" for a HotSync command from a PalmPilot. The HotSync Manager will conduct synchronizations, even when PalmPilot Desktop is not running.

## Conducting a Local HotSync

During the first HotSync, accounts must be established on both the PalmPilot Desktop and the PalmPilot unit. Subsequently, the

HotSync Manager recognizes that a PalmPilot has been synchronized and doesn't ask for a user's name.

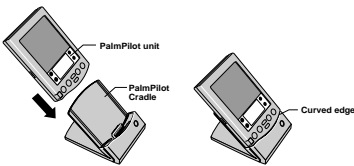
In the procedure below, you will be asked to make connections and confirm settings for the communications port, which will allow HotSync operation via the Cradle. (During software installation, you were asked to select a communications port.) Your first HotSync must be performed locally, rather than using a modem.

### *Fitting PalmPilot into the Cradle*

PalmPilot is designed to fit into the PalmPilot Cradle. When fitted correctly, there will be an electrical connection between the serial port of the PalmPilot and the PalmPilot Cradle.

### *To fit the PalmPilot into the PalmPilot Cradle:*

1. Position the PalmPilot Cradle on a convenient horizontal surface near the computer.
2. Align the PalmPilot over the Cradle, and then slide it into the Cradle as shown below:

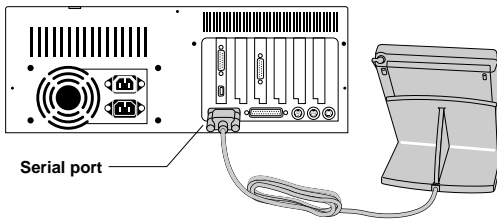


3. When correctly fitted into the Cradle, the curved edge on the bottom of the PalmPilot will align smoothly with the Cradle.

### *To connect a PalmPilot and configure HotSync:*

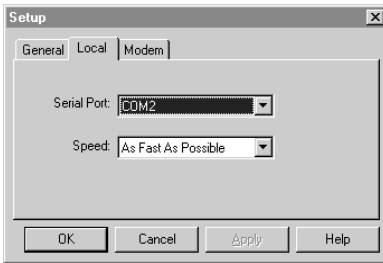
1. Turn off your PC, and plug the cable from the PalmPilot organizer's Cradle into the numbered communications port you selected during software installation. The following diagram shows a typical connection for the serial cable:





*Note:* If you are unsure about the exact location of the serial port on the desktop computer, refer to the user's manual supplied with the computer.

2. Launch PalmPilot Desktop.
3. From the HotSync menu, choose Setup. When the Setup dialog appears, click the Local tab to display the settings:



4. Check the selected Serial Port and make sure it corresponds to the port number that is connected to the PalmPilot Cradle.

*Note:* This port must not be shared with an internal modem or other device. If you have trouble determining the correct serial port, refer to the section entitled “Troubleshooting” that appears in Chapter 12: *Reference*.

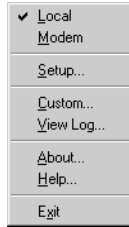
5. Choose a Speed. The default is As Fast As Possible, which will allow the PalmPilot Desktop and PalmPilot to find and use the fastest speed. We suggest you initially try the As Fast As Possible rate, and adjust downward if you experience problems.
6. Click OK to close the Setup dialog and activate your settings.

## To use HotSync for the first time:

1. If HotSync Manager is not running, launch it.
2. If you are using PalmPilot Desktop version 1.0 (for Windows 3.1x *only*), make sure that Local is selected in the HotSync menu, as shown below:



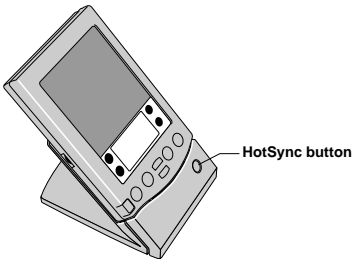
Version 1.0 for  
Windows 3.1x



Version 2.0 for  
Windows 95  
Windows NT 4.0

For PalmPilot Desktop version 2.0 (Windows 95 and Windows NT 4.0), choose Local from the HotSync Manager in the System Tray. Selecting Local tells the PalmPilot Desktop to use the Cradle for synchronization.

3. Turn on the PalmPilot and place it into its Cradle.



4. Press the HotSync button on the front of the PalmPilot Cradle.

HotSync begins. The HotSync process saves all data before transferring any information. During the course of the first HotSync, you will be asked for the user name that will correspond to the PalmPilot.

**Important:** Every PalmPilot should have a unique name. Never try to synchronize more than one PalmPilot to the same user name.

HotSync then performs a transfer of data for all five applications: the Date Book, Address Book, To Do List, Memo Pad and the Expense application.

A HotSync Progress window appears on the PalmPilot Desktop, as shown below. A similar screen displays the HotSync progress on the PalmPilot.



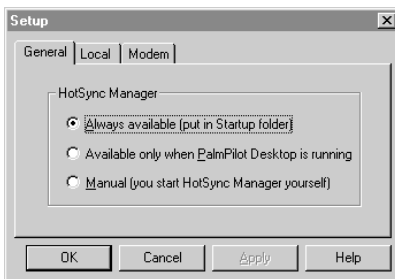
When the HotSync is complete, PalmPilot Desktop displays a final HotSync message.

## Selecting HotSync Options

As mentioned in the HotSync introduction above, it is possible to set the conditions when you want HotSync Manager to run.

*To set the HotSync Options:*

1. From the HotSync menu of PalmPilot Desktop v2.0, choose Setup. (For PalmPilot Desktop v1.0, choose Options from the Tools menu.) The Setup dialog appears, as shown below:



2. From the General tab, select whether you want HotSync to:
  - Always be available (to monitor the communication port for PalmPilot synchronization requests), *or*
  - Available only when the PalmPilot Desktop is operating, *or*
  - Run manually, which means you have to start the HotSync Manager yourself.

If you're not sure which of these options to use, use the Always available (default) setting.

3. Click OK. The Setup dialog closes.

## Customizing the HotSync Feature

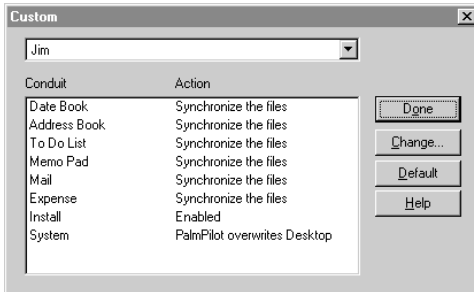
A “conduit” determines how records are handled during HotSync. A conduit exists for each application. This section describes how you can customize whether conduits are invoked, and what the conduits do.

PalmPilot Desktop assumes that you want all files synchronized between the PalmPilot and the PalmPilot Desktop. 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 one platform over another, or to not synchronize a particular type of file because you don't use it.

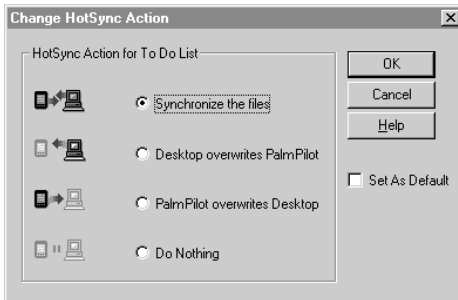
In addition to the Date Book, Address Book, To Do List Memo Pad and Expense application conduits, PalmPilot Desktop includes System and Install conduits. The System conduit backs up the system information stored in your PalmPilot, including Graffiti<sup>®</sup> software ShortCuts. The Install conduit is used to install PalmPilot applications. There should not be a need to disable the Install conduit.

## To customize HotSync operations:

1. Choose Custom from the HotSync menu. The Custom dialog appears, as shown in the following diagram:



2. At the top of the Custom dialog, choose the appropriate user name from the list.
3. Highlight an application, and click Change. The Change HotSync Action dialog appears, as shown below:



4. Make selections to set in which direction you want HotSync to write data. Within this dialog, you can also opt not to transfer data for a particular application by clicking Do Nothing.

*Note:* Changing the HotSync setting from the default only affects the *next* HotSync. Thereafter, the HotSync Actions revert to their default settings.

5. If you want the selection to serve as a persistent choice, click the Set As Default box. Thereafter, you can just click the Default button in the Custom dialog to revert to the default settings.

- Repeat steps #2 through #4 to change conduit behavior for other applications, or for a different user name.
- Click OK. The Change HotSync Action dialog closes.

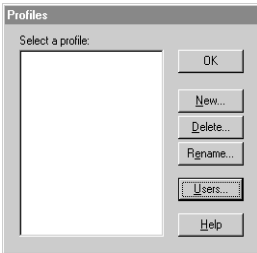
## User Profile

You can use HotSync to load data into a PalmPilot — without having that data associated with a user name. This makes it possible to pre-configure a number of PalmPilot organizers with specific information (such as a company phone list) before they are distributed to their actual users. This feature is only available for PalmPilot Desktop v2.0 (for Windows 95 or Windows NT 4.0).

*Important:* The User Profile feature is designed only for the first time HotSync, before a User ID has been associated with a particular PalmPilot.

### *To create a User Profile:*

- Choose Users from the Tools menu. The Users dialog appears.
- Click the Profiles button. The Profiles dialog appears. The Profiles dialog appears, as shown in the following diagram:



- Click the New button. The New Profile dialog appears, as shown in the following diagram:



4. Assign a name for the Profile, and click the OK button. Repeat steps #3 and #4 for each Profile that you want to create.
5. Click the OK button to close the Profiles dialog and return to PalmPilot Desktop. The name that you specified in step #5 appears in the User drop-down list of the PalmPilot Desktop toolbar, as shown in the following diagram:



6. Choose the Profile from the User drop-down list, and create the data for the Profile (e.g. company phone list, etc.).

### *To use a Profile for the first-time HotSync*

1. Install the new PalmPilot in the Cradle, and press the HotSync button. Because the PalmPilot is not associated with a particular user, the Users dialog appears.
2. Click the Profiles button. The Profiles dialog appears.
3. Choose the Profile that you want to load into the PalmPilot, and click the OK button. An alert appears, as shown in the following diagram:



4. Click the Yes button. All of the Profile data is transferred to the PalmPilot.

The next time you perform a HotSync operation, PalmPilot Desktop will prompt you for a User name to be associated with the PalmPilot.

## Conducting a HotSync via Modem

HotSync enables you to synchronize the PalmPilot when you are away from your PC by using a modem HotSync operation.

*Note:* You must conduct a local HotSync using the PalmPilot organizer's Cradle connected to the serial (COM) port of your PC before attempting a modem HotSync operation.

To perform a HotSync operation via modem, the PalmPilot, PalmPilot Desktop, and *both* modems must be configured properly. You will also need:

- Modem connected to your computer
- Modem connected to your PalmPilot
- Special modem cable to connect the PalmPilot organizer's serial connector to the modem. (The Cradle is not used for a modem HotSync operation.) This special cable may be ordered by contacting the number listed in Appendix A: *Technical Support, Service and Repair.*

### PalmPilot Configuration

*To conduct a HotSync operation via a modem:*

1. Turn on the PalmPilot and tap the Applications button.



2. Tap HotSync.
3. Tap the Enter Phone # button under the Modem Sync icon. The Phone Setup dialog appears on the PalmPilot screen, as shown below:



*Note:* If you have Network HotSync™ software installed on your PalmPilot organizer, the Remote Setup screen will appear. Refer to the *Network HotSync Handbook* for more information.



4. Enter the telephone number to access the modem connected to your computer.
5. If you need a prefix, such as “9,” to access an outside line, tap the Dial Prefix check box. Enter any needed dial prefix. You may also enter a comma in the field to introduce a “pause” in the dialing sequence. (Uncheck the outside-line prefix box when calling outside an office phone system.)
6. If the phone line you’re using for the PalmPilot has “call waiting,” tap the check box to disable the call waiting feature for the duration of the modem HotSync.

The default is “1170,” (the comma at the end introduces a pause). You can also use another common code “\*70,” to disable call waiting. Enter a different code if necessary.

*Note:* If you want to use a calling card to place the call, click the check box. Enter the calling card number in the field.

7. Tap OK. This returns you to the HotSync dialog.
8. Tap the Modem Setup button. The Modem Preferences screen appears.
9. Click Tone or Rotary to match the your telephone system.
10. Select the modem type that best describes the modem connected to your PalmPilot. The modem type specifies the modem startup string that appears in the String field. If you’re not sure of your modem type, or your modem doesn’t match any that appear in the list, choose Hayes Basic.
11. Select the modem speed with which the modems should communicate.
12. Select the speaker volume that you want for the modem.
13. Select the data flow control (Flow Ctl) that you want for the modem connection. Choose Standard, On (Xon) or Off (Xoff). You can also enter the exact string for your particular modem. Refer to the modem manual and enter the command string the modem manufacturer recommends.
14. Tap Done. This closes the Modem Setup box.

## Conduit Setup

The Conduit Setup feature only applies if you are conducting a modem HotSync, running PalmPilot Desktop v2.0, and HotSync Manager 2.0 (with a modem connected to the PalmPilot). It is designed to minimize the data synchronization time required to complete the HotSync operation. The Conduit Setup dialog enables you to define which files and/or applications are synchronized during a modem HotSync operation.

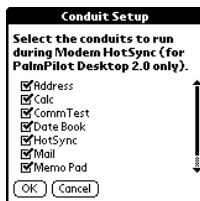
### *To change the settings in the Conduit Setup for a modem HotSync:*

1. On the PalmPilot, tap the Applications icon. The Application picker appears.



2. Tap the HotSync icon. The HotSync screen appears.

3. Tap the Menu icon, and choose Conduit Setup from the Options menu. The Conduit Setup dialog appears, as shown in the following diagram:



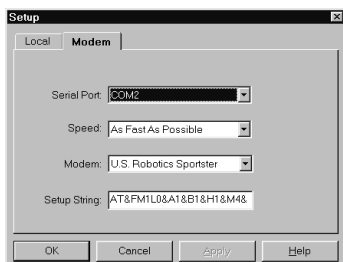
4. Tap the check boxes to de-select the files and/or applications that you do *not* want backed up during a modem HotSync. The default setting is that all files are backed up during a modem HotSync. Applications (such as games) that are not designed to be backed up or do not have a database will not be backed up — even if the item is checked in the Conduit Setup dialog.

A scroll bar appears at the right side of the screen, enabling you to scroll down to see all the file and application selections for the Conduit Setup dialog.

5. Tap the OK button to close the Conduit Setup dialog and activate your settings for the next modem HotSync operation.

## ***PalmPilot Desktop Configuration***

1. Choose Setup from the HotSync menu of PalmPilot Desktop v2.0. (For PalmPilot v1.0, choose Options from the Tools menu.)
2. Click the Modem tab. There are four settings to make. The modem Setup dialog is shown below:



3. Choose the communications port for the modem. If you are unsure, look at the back of the PC, and then, using the drop-down list, choose the corresponding number for the port to which the modem is connected.
4. Choose a Speed. The default rate is As Fast as Possible, which will allow the modems to find and use the fastest-transfer rate. We suggest you initially try the As Fast as Possible rate, and adjust downward if you experience problems. Refer to the face plate or modem manual if you do not know its top speed.
5. Choose the modem type or manufacturer. Refer to your modem manual or face plate for its type or settings. If you're not sure of your modem type, or your modem doesn't match any that appear in the list, choose Hayes Basic.
6. The Setup String that applies to the modem type or manufacturer will change to reflect the modem type you selected in step #5. If necessary, you can enter the exact string for your particular modem. In this case, refer to your modem manual and enter the setup string recommended by the modem manufacturer.
7. Click OK. The Setup dialog closes.

### *Performing HotSync via a Modem:*

1. On PalmPilot Desktop, confirm that:
  - Modem is connected and turned on, *and*
  - HotSync Manager is running, *and*
  - Modem is selected from the HotSync menu, *and*
  - No communications application is running on a COM port.

*Note:* Make sure the PC is disconnected from all online services, such as America Online (AOL), CompuServe, or the like. This helps to avoid conflicts with the COM port.

2. Connect the special modem cable from the PalmPilot organizer's serial connector to the modem. The other end goes into your modem.

**Warning:** Do not attempt to use other kinds of cables, even if they appear to be similar.

### *On your PalmPilot,*

1. Turn on the PalmPilot.
2. Tap Applications on the PalmPilot screen, and then tap the HotSync application.
3. Tap the Modem Sync button. The HotSync screen changes to show that it's dialing the modem.
4. HotSync begins. The HotSync process dials the PalmPilot Desktop modem, and performs a synchronization of all five applications: the Date Book, Address Book, To Do List, Memo Pad and Expense application. For PalmPilot Desktop v2.0, applications selected under Conduit Setup will be synchronized.

The HotSync progress is displayed on the PalmPilot, and a similar progress window appears on the PalmPilot Desktop. When finished, the PalmPilot displays a final HotSync message.

If you have any problems conducting a successful HotSync, refer to "Troubleshooting" in Chapter 12: *Reference*.

## Chapter 11

# Installing Applications on your PalmPilot™ Connected Organizer

Your PalmPilot is supplied with the Date Book, Address Book, To Do List, Memo Pad, Expense and Calculator applications installed and ready to use.

You can also install additional applications on your PalmPilot, such as games and other PalmPilot compatible software. The PalmPilot Install Tool application is designed to make it quick and easy to install software on your PalmPilot during a HotSync™ operation.

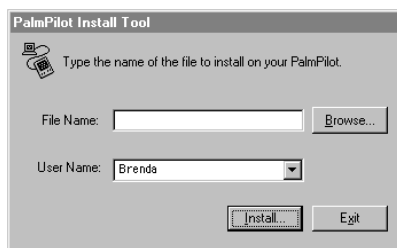
*Note:* Any game or application that you install on your PalmPilot resides in RAM memory, and can be deleted manually. A hard reset on the PalmPilot will automatically delete these applications.

## Using the PalmPilot Install Tool

*To install software on your PalmPilot:*



1. Open the PalmPilot Desktop program group, and select the PalmPilot Install Tool. The PalmPilot Install Tool dialog appears, as shown in the following diagram:

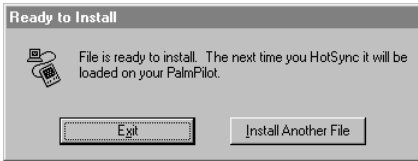


2. In the User Name drop-down menu, choose the User Name that corresponds to your PalmPilot.

3. Click the Browse button to locate the application that you want to install on your PalmPilot.

For example, to install a game on your PalmPilot, you would click the Browse button, navigate to the Games folder in the PalmPilot Desktop folder, and select the game file that you want.

4. Click the Install button. The Ready to Install dialog appears, as shown in the following diagram:



5. Click the Exit button. Or, click the Install Another File button to return to step #3 and install another application.
6. Perform a local HotSync operation in the usual manner. The application(s) that you specified in step #3 will be installed automatically during the course of the HotSync operation.

## Games

Your PalmPilot includes several games that can be installed with the PalmPilot Install Tool. These games include:

- **HardBall**
- **Puzzle**
- **MineHunt**
- **SubHunt**

Once installed and started a game, the instructions for the game appear in the Game menu. Depending on the game, the Game menu may also contain commands to show high scores, to start a new game, or to set Preferences for the game.

## Chapter 12

### Reference

This chapter includes troubleshooting information, explanations of possible error messages, and how to reset your PalmPilot™ connected organizer. This chapter also includes information about how to reach 3Com in case you need assistance with your PalmPilot.

*Important:* For other troubleshooting tips not included in this handbook, refer to either the readme.txt file or the HelpNotes file located in the PalmPilot Desktop directory. These files are also located on the installation CD-ROM (and diskettes).

### Troubleshooting

If you should encounter a problem with PalmPilot, look to this section for the description that most closely matches the symptoms you observe, and try the suggestions listed.

#### *Installation Troubleshooting*

Do not place your PalmPilot in the Cradle during the installation of the PalmPilot Desktop software. If PalmPilot is in the Cradle, the installation program may incorrectly detect that a modem is attached to one of your available serial ports.

#### *HotSync Troubleshooting*

HotSync is described in detail in Chapter 10: *HotSync™ Technology*. If you are having trouble with HotSync, refer to the online help available in the PalmPilot Desktop software (on your PC).

#### *General Troubleshooting*

##### **PalmPilot does not turn on:**

- Adjust the contrast control.

- Make sure batteries are installed properly.
- Replace the batteries. If PalmPilot still does not operate, try a soft reset (refer to the following section: *Resetting the PalmPilot™ Connected Organizer*).

### Low battery warning after replacing the batteries:

- The battery warning message may appear immediately after replacing the batteries.

In addition, if you check the battery gauge in the Application picker *immediately* after replacing the batteries, the gauge may start at “empty” and slowly rise to “full.” This is normal. The battery gauge requires a period of a few minutes to accurately show the condition of the batteries.

### No sound:

- In the Preferences application, General preferences, make sure the System Sound check box is checked. If the check box is not checked, there will be no sound. Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about how to use the settings in the Preferences application.

### PalmPilot turns itself off:

- Your PalmPilot is designed to turn itself off after a period of inactivity. This period can be set at one minute, two minutes or three minutes. In the Preferences application, General preferences, check the “Auto-off after” setting, and change the setting if you need a longer delay before the automatic shutoff feature is activated. Refer to Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about how to use the settings in the Preferences application.

### PalmPilot doesn't recognize my handwriting:

- For PalmPilot to recognize handwriting input with the stylus, you need to use the Graffiti character strokes. Refer to the section entitled “Using the Stylus to Write Text” that appears in Chapter 2: *Working with the PalmPilot™ Connected*



*Organizer* for information about how to write Graffiti character strokes.

- Make the Graffiti® character strokes in the Graffiti writing area — not on the display part of the screen.
- Make sure you are making the strokes for letters in the left-hand side, and the strokes for numbers in the right-hand side of the Graffiti writing area.
- Make sure that Graffiti is not shifted into extended or punctuation modes. Refer to the section entitled “Extended Graffiti Characters” that appears in Chapter 2: *Working with the PalmPilot™ Connected Organizer* for information about shifting into and out of punctuation modes.

### **Tapping the screen buttons or icons does not activate the corresponding feature:**

- Recalibrate the digitizer. In the Preferences application, choose Digitizer from the pick list and follow the directions on the screen.

### **When I tap the Menus icon, nothing happens:**

- Not all applications and/or views have menus. Try changing to a different application.

### **A message appears stating that PalmPilot’s memory is full:**

- Delete unused memos and records. If necessary, you can save these records to your desktop computer using the Save Backup Copy option that appears in the Delete dialogs.
- Purge the Date Book and To Do List applications. This deletes To Do items that have been completed, and past Date Book events from your PalmPilot organizer’s memory. Note that memory may not be recovered until your next HotSync operation.
- If you have installed additional applications on your PalmPilot, remove them to recover memory.

## Security Troubleshooting

The following are troubleshooting tips for PalmPilot organizer's security system. The features of the security system are accessed and controlled with the Security application, and are described in Chapter 8: *Additional Features*.

### I forgot the password, but still have access to PalmPilot:

- You can use the Security application to delete the password. If you do this, all private records will be deleted from your PalmPilot.

However, you can perform a HotSync operation *before* you delete the password: the HotSync process backs up all records, whether or not they are marked as private. In this case, the following procedure restores your private records, and gives you access to them:

1. Use the PalmPilot Desktop software and the PalmPilot Cradle to perform a HotSync of your PalmPilot data.
2. Use the Security application to remove the password (tap the Forgotten Password button). Private records will be deleted at this point.
3. Use the PalmPilot Desktop software and the PalmPilot Cradle to perform a HotSync of your PalmPilot data. This will restore the private records by transferring them from your desktop computer to the PalmPilot.

### I forgot the password, and PalmPilot is locked:

- If you have assigned a password and locked your PalmPilot, a hard reset is the only way to continue using your PalmPilot. Refer to the following section, *Resetting the PalmPilot™ Connected Organizer*, for the hard reset procedure.

## Applications Troubleshooting

The following are troubleshooting tips that are specific to the various PalmPilot applications.

### Tapping the Today button doesn't move to the screen of the current date:

- PalmPilot is not set to the current date. In the Preferences application, General preferences, make sure the Set Date box displays the current date. Refer to Chapter 2: *Working with the*

*PalmPilot™ Connected Organizer* for information about how to use the settings in the Preferences application.

### **Records seem to be missing in various applications:**

- Check the Categories pick list (upper right corner of the screen). Choose “All” to display all of the records for the application.
- Check the Security application and make sure that the Private Records setting is set to “Show” private records.

### **Memo Pad application:**

- If you cannot manually arrange the order of the memos in the List View, check the Memo Preferences setting. Make sure that Sort by is set to Manual.
- If you choose to view your memos alphabetically on PalmPilot Desktop v2.0 (for Windows 95 and Windows NT 4.0) and then perform a HotSync, the arrangement of the memos on the PalmPilot will still be in the order defined in the Memo Preferences setting. In other words, the settings for the order that you use with PalmPilot Desktop *are not* transferred to the PalmPilot.
- *Macintosh users only:* If you perform a HotSync operation with your PalmPilot Personal or Professional Edition and want your memos to appear by order of entry on your Macintosh computer, you must select Manual as the “Sort by” option on the PalmPilot.

If the “Sort by” option on your PalmPilot Personal or Professional Edition is set to Alphabetic, memos will appear sorted alphabetically on your Macintosh, and you will not be able to revert to the original sort order.

The setting for the memo sort order that you select with your Macintosh is *not* transferred to the PalmPilot Personal or Professional Edition.

### **Date Book application:**

- 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 for the particular day to see the overlapping events.

## Removing PalmPilot Desktop Software

An application program is provided for the removal of the PalmPilot Desktop software.

*To remove the PalmPilot Desktop software:*

- Open the PalmPilot Desktop program group, and double-click on the Uninstall PalmPilot Desktop icon. Follow the directions that appear on the screen.

## Resetting the PalmPilot™ Connected Organizer

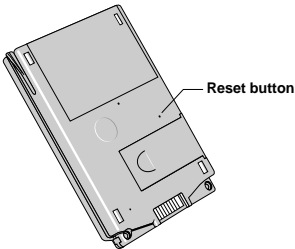
A reset button can be activated through a hole in the back panel of your PalmPilot. Under normal circumstances, you will never have to use the reset button. However, on rare occasions your PalmPilot may “hang” (no longer respond to buttons or the screen). In this case, you need to perform a reset to get the PalmPilot running again.

### *Soft Reset*

A soft reset tells PalmPilot to stop what it’s doing and start over again. All records and entries you have stored in your PalmPilot are retained with a soft reset.

*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, as shown in the following diagram:



Following a soft reset, the Welcome to PalmPilot screen appears, followed by the General Preferences screen (to set time and date).

Use any of the buttons or onscreen controls to continue using your PalmPilot.

### ***Hard Reset***

A hard reset also tells PalmPilot to start over again. With a hard reset, all records and entries stored in your PalmPilot are erased. *Therefore, never perform a hard reset unless a soft reset does not solve your problem.*

Note that any data previously synchronized with your desktop computer will be restored at the next HotSync.

### *To perform a hard reset:*

1. Hold down the green power button on the front panel of the PalmPilot organizer.
2. While holding down the power button, use the tip of an unfolded paper clip (or similar object *without* a sharp tip) to gently press the reset button.
3. A message prompt appears on the PalmPilot organizer's screen, warning that you are about to erase all the data stored on your PalmPilot:
  - Press the up scroll button on the PalmPilot organizer's front panel to complete the hard reset. The Digitizer screen appears, the same as starting PalmPilot for the first time.
  - Or, press any other button to perform a soft reset.

*Note:* With a hard reset, the current date and time are retained. Format preferences and other settings are restored to their factory default settings.

## **Appendix A: Technical Support, Service and Repair**

If you have a problem using PalmPilot, make sure you have reviewed the Troubleshooting section of this chapter, as well as the README file and HelpNotes included on the PalmPilot Desktop installation CD or diskettes. The README and

HelpNotes files are also copied to the PalmPilot Desktop directory when you install the PalmPilot Desktop software on your PC. HotSync help is also available in the online Help of the PalmPilot Desktop software.

For further assistance, please visit our web site where PalmPilot HelpNotes are posted: <http://www.palmpilot.com>.

Before requesting e-mail or phone support, experiment a bit to reproduce and isolate the problem. When you do e-mail or call support, please be ready to provide information about the version of DOS/Windows or Macintosh System you are using, the actual error message or state you are experiencing, and the steps you take to reproduce the problem.

#### Online Support

**Web Access**     <http://www.palmpilot.com>

**Fax on Demand**     800-762-6163

**Internet**     [support@palmpilot.com](mailto:support@palmpilot.com)

**America Online**     Keyword: PalmPilot  
*User Forum*

**CompuServe**     GO PALMB>Palm Computing/3Com  
*User Forum*

#### Technical Support, Service and Repair

(847) 676-1441 (phone support, 8am - 6pm CST Monday - Friday)  
(847) 676-7323 (FAX)     State product name, model number, and the nature of the problem.

For technical support outside the U. S. and Canada, please contact your local 3Com representative.

#### Technical Support, Europe

+33 (0) 3 20 19 24 24  
+33 (0) 3 20 19 24 34 (FAX)

## Accessories and Disk Fulfillment

To order 3.5" diskettes of the PalmPilot Desktop software, or accessories for your PalmPilot, call:

United States/Canada (800) 881-7256  
(800) 437-3299 (FAX)

United Kingdom 0800 22 52 51 (toll free)  
0118 922 82 99 (FAX)

Other Europe 33 (0) 3 20 19 19 39

Middle East, Africa 33 (0) 3 20 91 99 27 (FAX)

Australia/New Zealand (61) 3 9482 6557  
(61) 3 9482 1895 (FAX)

Other countries (01) 408 848 5604  
(01) 408 848-5784 (FAX)

## Sales Offices

The following is information for contacting our sales offices.

*Do not* contact these sales offices for product technical support or other questions regarding the use of your PalmPilot.

### Europe & France

Tour Kupka A  
18 rue Hoche  
F-92980 Paris La Défense  
FRANCE  
+33 1 41 97 46 00  
+33 1 49 07 03 03 FAX  
01 55 58 88 33 *Infoline*

### Germany, Switzerland, Austria

Münchner Strasse 12  
D-85774 Unterföhring  
DEUTSCHLAND  
+49 (0)89 99 220 0  
+49 (0)89 95 77 220 FAX  
0180 567 15 30 *Infoline*  
0180 567 15 35 *Infoline FAX*

### Italy

Piazza Don E. Mapelli, 75  
I-20099 Sesto San Giovanni  
ITALIA  
+39 (0)2 262 961  
+39 (0)2 262 61188 FAX

### Nordic

Parkvägen 2A  
S-17129 Solna  
SWEDEN  
+46 (0)8 705 88 00  
+46 (0)8 83 79 20 FAX  
*Sweden Infoline:* 020 240004  
*Norway Infoline:* 800 10693  
*Denmark Infoline:* 800 16068  
*Finland Infoline:* 0800 111885

## **United Kingdom**

220 Wharfdale Rd.  
Winnersh, Wokingham  
Berkshire  
RG41 5TP - UK  
+44 01189 228 0  
+44 01189 696 666 *FAX*  
0800 22 52 52 *Infoline*

## **United States**

1565 Charleston Rd.  
Mountain View, CA 94043  
USA  
(415) 237-6000  
(415) 691-0927 *FAX*

## **Spain**

c/Gobelas, 25-27  
E-28023 Madrid  
SPAIN  
+34 (9)1 509 69 00  
+34 (9)1 307 67 18 *FAX*

## **Benelux**

Planetenbaan 118  
NL-3606 AK Maarssen  
NETHERLANDS  
+31 (0)346 586 211  
+31 (0)346 586 222 *FAX*



## Appendix B: Expense Templates

This appendix provides illustrations of the four expense templates that are provided with PalmPilot™ Desktop software. You may use or modify any of these templates when creating expense reports with data from the Expense application.

### Sample 1

SAMPLE11

1	A	B	D	E	F	H	I	J	K	L	N
2	<b>Travel Expense Reimbursement Claim Form</b>										
4	Employee Name: _____			Client: _____			Office Use Only:				
5	02KMI						Audited: _____				
6	Date Submitted: 1/14/97			Case: _____			Approved: _____				
7							Processed: _____				
8	Mls/Km Rate										
9	0.23										
10	Voucher Number	Date	Foreign Curr. Amount	Exchange Rate	US Dollar Amount	Expense Type	Description of Expense Claim				
11											
12											
13											
14											
15											
16											
17											
18											
19											
20											
21											
22											
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29											
30											
31											
32											
33											
34											
35											
36											
37											
38											
39											
40	<b>Page Total</b>										
41											
42											
43											
44	Signature: _____										
45	(REQUIRED)										
46											
47											
48											
49	Approval: _____										
50	(FOR ADMIN. PERSONNEL ONLY)										
51											
52											
53											
54	<i>Expense Claims Will Not Be Processed Unless Timesheet Submissions Are Current</i>										
55											
56											
57	Sample1										

# Sample 2

Sample2.xlt

	A	B	C	D	F	H	J	L	N	P	R	T	V	X
1	<b>Travel Expense Report</b>													
2	Employee name			Employee number				Oral number				Date		
3												1/14/97		
4	Address							City						
5														
6														
7														
8	Date:											TOTAL		
9	Bill to:											TOTAL		
10														
11	<b>LODGING</b>													
12	Hotel													
13	Laundry													
14	Tips													
15	Lodging total													
16														
17	<b>MEALS</b>													
18	Breakfast													
19	Lunch													
20	Dinner													
21	Meals total													
22														
23	<b>BUSINESS</b>													
24	Business meals													
25	Conference													
26	Entertainment													
27	Business total													
28														
29	<b>TRANSPORTATION</b>													
30	Airfare													
31	Auto Rental													
32	Auto Maint./Gas													
33	Local Trans.													
34	Tolls/Parking													
35	Miles @ \$.29 /mile													
36	Trans. total													
37														
38	<b>MISCELLANEOUS</b>													
39	Gifts													
40	Telephone													
41	Office supplies													
42	Postage													
43	Other													
44	Misc. total													
45														
46	<b>TOTAL</b>													
47														
48												Less company paid		
49												Less cash advance		
50												Due employee		
51												Due company		
52														
53														
54														
55	Approved signature			Exp#				Date						
56														
57														
58	Approved signature			Exp#				Date				Employee signature		
59														
60	Approved signature			Exp#				Date				Employee signature		
61														
62														

Sample2

# Sample 3

Sample3.xls														
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1				Employee			Emp. #	Dept.	Project					1/14/97
2														
3														
4	<b>Expense Report</b>													
5														
6				DATE										
7	ITINERARY			CITY										
8				CITY									Co. Paid	Emp. Paid
10	Airfare			Company paid										
11				Employee paid										
12	Auto rental			Company paid										
13				Employee paid										
14	Hotel			Company paid										
15				Employee paid										
16	Local trans.			Company paid										
17				Employee paid										
20	Mileage @			Company paid										
21	\$0.20 per mile			Employee paid										
22	Telephone			Company paid										
23				Employee paid										
24	Laundry			Company paid										
25				Employee paid										
26	Breakfast			Company paid										
27				Employee paid										
28	Lunch			Company paid										
29				Employee paid										
30	Dinner			Company paid										
31				Employee paid										
32	Business meals & entertainment			Company paid										
33				Employee paid										
34	Conference			Company paid										
35				Employee paid										
36	Postage			Company paid										
37				Employee paid										
38	Auto maintenance			Company paid										
39				Employee paid										
40	Other			Company paid										
41				Employee paid										
42														
44	Emp. signature			Emp. #										
45				Date										
46														
48	Approval signature			Emp. #										
49				Date										
51														
52														
53														
54														
56														
57	<b>BUSINESS MEALS AND ENTERTAINMENT EXPENDITURES</b>													
58														
59	Date	Participant's Name, Company and Business Relationship	Place, Location & Type of Entertainment / Conference	Business Purpose of Entertainment	Miscellaneous	Amount								
60														
61														
62														
63														
64														

Total Auto Miles

Total Company paid

Total Employee paid

Less travel advances

Due Employee

Due Company

## Sample 4

WEEKLY EXPENSE													No. 111904																																																																																																																																																																																																																												
EMPLOYEE NAME													EMP. NO.													EXT.													PROJECT													DEPT.													WEEK ENDING													FRIDAY													<small>FILL IN TRAVEL AUTHORIZATION NO. WHENEVER TRAVEL TICKETS OR A CASH TRAVEL ADVANCE IS OBTAINED THRU THE COMPANY</small> <b>Travel Authorization Number</b> TA																																																																																																																																														
MAIL CHECK TO:													ADDRESS													HOLD FOR PICK-UP													1. Total Expenses from Part A 2. Direct Charges to Palm 3. Reimbursable Expense (1-2) 4. Cash advance or Carryover																																																																																																																																																																																																		
PURPOSE OF TRIP													BALANCE DUE													Company (4-3)													Employee (3-4)																																																																																																																																																																																																		
DAY AND DATE													\$													\$													\$													\$													\$													\$													\$													TOTALS													AIRLINE TICKET REFUND/CREDIT <small>(Unused tickets attached)</small> US \$0.00 <b>FOREIGN CURRENCY EXCHANGE</b> 1. United States 1US\$=1.000 2. France 1US\$=5.430 3. Germany 1US\$=1.900 4. Ireland 1US\$=0.740 5. England 1US\$=0.485 6. Japan 1US\$=105.400																																																																																																																				
CITIES OR TOWNS FROM													PERSONAL & Co. Charged													Date(s)													Locations																																																																																																																																																																																																		
VISITED TO													MILES @ 29.0¢ per mile													DOLLARS													AIR FARE													AUTO RENTAL													TOLLS & PARKING													AIR, RAIL, BUS FARE													TAXI LIMOUSINE													LODGING, HOTEL, MOTEL													SUB-TOTALS													TELEPHONE													PERSONAL MEALS													BANQUET MEALS													BUSINESS MEALS													ENTERTAINMENT													OTHER EXPENSES													OTHER EXPENSES IN \$													TOTALS												
PLACE/LOCATION													DATE													ITEMS / SERVICES PURCHASED / PERSONS <small>(Mark: Total, Business Relationship)</small>													BUSINESS PURPOSE													AMOUNT													2nd Manager (if required) Date Finance Date DEPT ACCT PROJECT#/W.O. AMOUNT TOTAL AMOUNT																																																																																																																																																																								

### Appendix C: Creating a Custom Expense Report

This section explains how to modify existing Expense application templates, and how to create your own custom expense report templates for use with the Expense application.

*Note:* This section assumes that you are an experienced Microsoft Excel user, or are experienced with a similar spreadsheet application. If you are not experienced with Microsoft Excel, it is recommended that you consult your company's Information Services department or another experienced user.

## About Mapping Tables

Before creating or modifying an Expense template, it's important to understand the function of PalmPilot™ Desktop's Expense application. In simple terms, the Expense application is designed to move Expense data from your PalmPilot™ connected organizer into a Microsoft Excel spreadsheet.

Each Expense item stored in the PalmPilot represents a group of related data. The following data can be associated with an expense item:

- Category
- Date
- Expense Type
- Amount
- Payment Method
- Payment Currency
- Vendor
- City
- Attendees
- Note

When you perform a HotSync™ operation between your PalmPilot organizer and the PalmPilot Desktop on your PC, the Expense data is stored on your PC (in a file named expense.txt). When you activate the Expense application on Pilot Desktop, an Excel Macro starts, and populates an expense template with your data based on the rules specified in a spreadsheet file named Mappable.xls.

The Mappable.xls file is an editable spreadsheet that functions as a "mapping table." The function of the mapping table is to guide the Excel Macro in extracting the Expense data. The mapping table tells the Excel Macro how large the spreadsheet is, and provides the data cell layout of the Excel template used for the Expense Report.

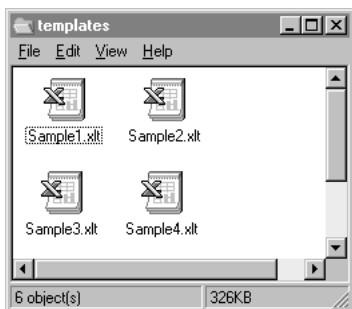
The sample templates provided with the Expense application are stored in the folder named "templates." (If using Windows 3.1x, this subdirectory will be named "template.") This folder (subdirectory) is in the same folder as the PalmPilot Desktop application.

## Customizing Existing Sample Templates

Four sample Expense Report templates are provided with PalmPilot Desktop. If the layout of one (or more) of these templates are appropriate for your reporting needs, you can easily customize the templates with your company name and other information.

### *To customize a sample Expense Report template:*

1. In the folder (subdirectory) that contains the PalmPilot Desktop application, open the folder named “templates.” (If using Windows 3.1x, this subdirectory will be named “template.”) Make a backup copy of the contents of this folder.



2. Double-click on the name of the sample template that you want to modify. The sample template opens in Microsoft Excel.
3. Make any changes that you want to the names (or other information) that appears in the sample template.

You can insert your own company logo without having to make changes to the Maptable.xls file. However, if you change the file name, you will have to make a corresponding change in the Maptable.xls file.

Renaming the cells will not require changes to the Maptable.xls file provided that the expense type corresponds to the PalmPilot data. For example, you can change “Snack”

to “Munchies” — and then all items entered on the PalmPilot as “Snack” will be mapped to the cell(s) labeled “Munchies.”

*Important: Do not* insert rows or columns in the sample template. Doing so will change the way your Expense data is mapped to the template and cause errors. If you want to move the cells to a different location, add or delete rows or columns of cells, you will have to make changes to the Mappable.xls file.

4. Choose Save As from the File menu. The Save As dialog appears.
5. Click the Save as type drop-down list, and choose Template (\*.xlt).
6. Navigate to the “template” folder (in the PalmPilot Desktop directory). If you do not need to make changes to the Mappable.xls file, save the template file with its *original file name* (e.g. Sample2.xlt).

If you *will* need to make changes to the Mappable.xls file, give your modified template a unique name. Be sure to use the .xlt file suffix, which defines that the file is a Microsoft Excel template.

7. Click the Save button. Your modified template is saved and available for future use.

At this point, your modified Expense template is saved, and will appear in the Templates drop-down list of the Expense Report Options dialog. However, if you must make a corresponding modification to the Mappable.xls file, you must do this before you can use the modified template with your Expense data.

To modify the Mappable.xls file for your new template, refer to the section entitled “Programming the Mapping Table” that appears later in this appendix. *Read all of the sections of this appendix before making changes to the Mappable.xls file.*

## Determining the Layout of the Expense Report

This section describes the layout considerations for the Expense Report, and explains the terms used for creating the report.

### Labels

There are two kinds of labels that you need to define for your report: day/date, or expense type. Each kind of label can either be a Fixed or Variable label. A Fixed label means that the label *always* appears as a header at the beginning of a row or column. If a label is not Fixed, it is variable.

For example, a list table of expenses could have variable labels in the rows for day/date, and variable labels in the columns for expense type. In this case, neither day/date or expense type information would be “fixed” (as a header). Instead, the date and expense type information would be filled into the cells of the spreadsheet as appropriate.

Examples of both Fixed and Variable labels appear in the sample expense templates.

### Sections

A Section is an area of the report that has common formatting. It is common for an Expense report to have more than one Section. For example, the sample Expense Report named SAMPLE3.XLT contains several Sections, as highlighted in the following diagram:

A	B	C	D	E	F	G	H	I	J	K	L	
1			Payroll		Payroll						1,000	
2												
3			Expense Report									
4												
5	DATE											
6	CITY											
7												
8												
9												
10												
11												
12												
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97												
98												
99												
100												

Section 1 (not prepaid)

Section 2 (prepaid)

Section 3

Because your Expense data is mapped to row and column areas of your final report, different Sections require different definitions for the data mapping. To create additional Sections with different



mapping, you create corresponding additional lines to the mapping table file named Mappable.xls. The procedure for this is explained in later sections of this Appendix.

If a section contains cells for prepaid (company paid) expenses, you will need to create an additional line in the mapping table for “prepaid.” This will count as an additional section in the mapping table. The only data that will be different in the prepaid section (from the non-prepaid section) is the row/column numbers for the expense type.

## Analyzing your Custom Expense Report

If you already have a custom Excel expense report, you can use it with a modified mapping table. However, before you can create a Mappable.xls file that corresponds to your custom Expense Report, you must first analyze the characteristics of your report.

*Perform the following before you begin a custom mapping table:*

- Print a copy of your custom expense report. Activate the Row and Column Headings option in the Sheet settings of the Page Setup command. This will enable you to quickly determine the size of the Section(s), as well as the numbers for the start rows and columns.
- On the printed copy, identify the data Sections. A Section is an area of data with common row and column formatting. A yellow “highlighter” marking pen can make it easy to see the Sections as you work with programming the mapping table.

Your custom Expense Report can contain any number of Sections, and the same data can be repeated in any Section.

- On the printed copy, identify the type of Labels that apply to each Section. Each Section can only have one kind of Fixed or Variable Label for rows. Likewise, each Section can only have one kind of Fixed or Variable Label for columns.

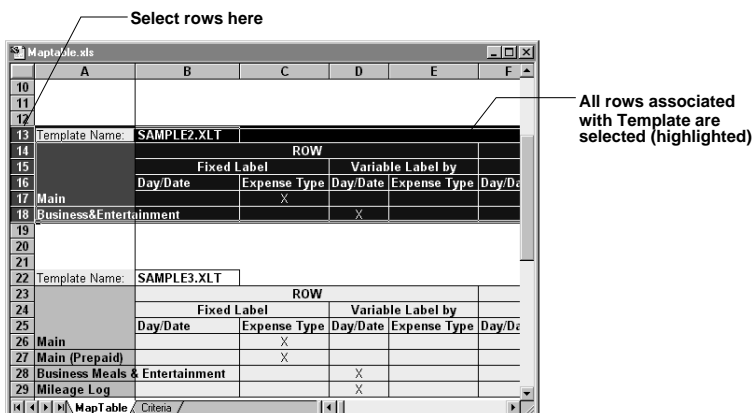
- Place a copy of your custom Expense Report in the folder named “template” (in the PalmPilot Desktop directory). Change the file name so it has the file extension .xlt (which defines it as a Microsoft Excel Template). Make a note of the exact file name so it can be defined in the mapping table file.

## Programming the Mapping Table

Once you have analyzed the components of your custom Expense Report, you can program the mapping table to fill the report with data from the PalmPilot.

### *To program a new custom mapping table:*

1. In Microsoft Excel, open a copy of the file named Mappable.xls. This file is located in the same folder (subdirectory) as the PalmPilot Desktop 2.0 application. *Make a backup copy of this file before you make your modifications.*
2. **Mapping a new template.** Scroll to where you find the name of the original template that you chose for your modifications. The name of the template will appear in column B of the Mappable.xls file, next to the cell highlighted in green that reads “Template Name:”. If you did not modify an existing template, move to any table in the Mappable.xls file.
3. Select all the *rows* associated with the template name. To select the rows, click and drag on the row numbers (left side), so they appear highlighted as shown in the following diagram:



- Choose Copy from the Edit menu.
- Scroll down to a blank area of the Maptable.xls file (below the rows used for SAMPLE4.XLT), and click on a row number to select a blank row.
- Choose Paste from the Edit menu. A copy of the rows you selected in step #3 is pasted into the Maptable.xls file.
- Name the table.** In the cell immediately to the right of the cell entitled Template Name, enter the *exact* file name of your custom Expense Report template.
- Define the number of Sections.** Each row in a table defines how the PalmPilot data will be placed in a Section of your custom Expense Report. Note that the prepaid portion of a section has its own row, and is counted as a separate section for map table purposes *even though it is not a separate section in your template.*

22	Template Name:	SAMPLE3.XLT				
23			ROW			
24			Fixed Label			
25			Day/Date	Expense Type		
26	Main			X		
27	Main (Prepaid)			X		
28	Business Meals & Entertainment					
29	Mileage Log					

Table with four Sections

You may add or delete rows as necessary so that the total number of rows corresponds to the number of Sections in your custom Expense Report. To clear all of the existing settings in a row, click to select the row and press Ctrl-Delete. Name each row to correspond to a Section of your custom Expense Report.

9. **Determine the Label settings.** The orientation of the data fields (Row, Column) appear in the yellow section of the table, as shown in the following diagram:

2	3	4	5	6	7	8	9
SAMPLE1.XLT	ROW			COLUMN			
	Fixed Label	Variable Label by		Fixed Label	Variable Label by		
Day/Date	Expense Type	Day/Date	Expense Type	Day/Date	Expense Type	Day/Date	Expense Type
		X					X

Determine whether the **Rows** will contain expense or date information, and place an “x” in the appropriate box. When you do this, you also define whether the label is Fixed or Variable. You can only place one “x” in the Row section (columns 2-5).

Determine whether the **Columns** will contain expense or date information, and place an “x” in the appropriate box. When you do this, you also define whether the label is Fixed or Variable. You can only place one “x” in the Column section (columns 6-9).

10. **Define the dimensions of the Section.** The dimensions of the Section appear in the green columns (10-13), as shown in the following diagram:

10	11	12	13
# of Rows	# of Columns	Start Row	Start Column
28	9	12	1

The **# of Rows** represents the total number of rows in the Section, excluding any header or total rows. In other words, this includes only the number of rows in the Section where PalmPilot data will be placed.

The **# of Columns** represents the total number of columns in the Section, excluding any header or total columns. In other words, this includes only the number of columns in the Section where PalmPilot data will be placed.

**Start Row** is the number of the first row of the Section that will be filled with PalmPilot data.

**Start Column** is the number of the first column of the Section that will be filled with PalmPilot data.

11. **Define the Dates and Intervals.** The dates and intervals between dates appears in the light blue columns (14-17), as shown in the following diagram:

14	15	16	17
Date	Intervals Between		
Date	Dates	Start day	Day
2	0		

In the **Date** cell, enter the row or column number where all the date information will be placed.

In the **Dates** cell, enter the number of blank columns (or rows) separating the date fields. If there are no blank columns (or rows) between date entries, leave this number set to zero.

In the **Start Day** cell, enter the day of the week which starts the expense reporting period. Enter a three character abbreviation for the day (e.g. Sun, Mon, Tue, etc.).

In the **Day** cell, enter the row or column number where all the day information will be placed. If the dates are in a row, enter the row number. If the dates are in a column, enter the column number.

12. **Define whether the Section is in list format.** This setting appears in the light purple columns (18-19), as shown in the following diagram:

18	19
Listing Format	Expense Type
YES	3

If the Section will present the data in a list format, enter the word YES. Otherwise, enter the word NO. The following diagram shows data presented in a list format:

10	Voucher	Date	Expense	Description of Expense Claim
11	Number		Type	
12				
13				
14				
15				

**Only if your section is in list format:** In the Expense Type cell, enter the number of the row or column where the expense description will be placed. Expense amounts can be entered in several different columns or rows if required by your template. *Expense type labels* must all appear in the same column.

13. **Enter the row or column numbers for the expense types that appear in the Section.** These settings appear in the aqua columns (20-48), partially shown in the following diagram:

20	21	22	23	24	25
Expense Types					
Airfare	Breakfast	Bus	Business Meals	Car Rental	Dinner
4	4	4	4	4	4

For these settings, simply enter the row or column number for the expense types that you want to appear in the Section. Note that the same row or column number can be used more than once. An example of this would be meals that encompass breakfast, lunch, dinner, and snacks. In the previous example, all expense items would be populated into row/column 4 of the custom Expense Report.

14. **Complete the table.** All of the remaining columns (49-57) in the table are used to define the column or row number that corresponds to the description.

15. **Marking a Section for prepaid expenses (yellow column).** If a row in the map table is for prepaid (company paid) expenses, type a YES in the cell on that Section's row. Type NO in all the cells of this column that do not pertain to prepaid expenses.

25		PrePaid
26	Section 1	NO
27	Section 1 (Prepaid)	YES
28	Section 2	NO

16. Repeat steps #9 through #15 for each Section that you have defined for your custom Expense Report.
17. **Mapping Expense Report Options dialog (magenta section).** The Expense Report Options dialog has five fields where you can fill in data for the header on your expense report. Use this section to specify the row and column on your template where this information will be mapped.

Employee Name		Department		Phone or Extension		Project
Header1Row	Header1Col	Header2Row	Header2Col	Header3Row	Header3Col	Header4R
2	5	2	9			

Because header data is not related to any particular Section, you only have to fill in one row. If the item does not appear on your template, leave these cells blank.

## Using Applications Other Than Microsoft Excel

You can use applications other than Microsoft Excel (such as Lotus 1-2-3 or Quattro Pro) to open and manipulate the Expense data on your PC. The data file is named "expense.txt," and is stored in the folder named "expense" within the folder containing the PalmPilot user data.

Expense data in the expense.txt file is in tab-delimited format.

## Expense File Details

The expense.txt file contains four groups of data. It will be easier to see these four distinct groups of data if you open the file with a spreadsheet application.

- **Trips.** Shows the number of Expense application categories, and lists each one followed by an “end” statement.
- **Currency.** Shows how many currencies were used for the Expense data, and lists the countries that correspond to that currency.
- **Trip.** Shows the number of expenses by category, and lists the expenses for each category.
- **Expenses.** Shows the total number of expenses, and lists them chronologically.



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## 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 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.



## **Canadian RFI 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.



## Index

### A

---

Address Book  
  activating 65  
  address entry  
    details 71  
  categories 70  
  creating entry 66  
  deleting entries 75  
  editing entry 68  
  list by company 70  
  lookup entries 69  
  menu commands  
    72  
  phone numbers 68  
Alarm  
  setting 57  
Alarm Sounds 13  
Applications  
  address book 65  
  buttons 2  
  calculator 116  
  date book 45  
  deleting from  
    PalmPilot 119  
  expense 95  
  finding text 113  
  installing 149  
  memo pad 87  
  memory 118

  menus 35  
  record categories  
    38  
  security 120  
  starting 23  
  to do list 77  
Attendees 102  
Auto-Off Delay 12

### B

---

Backlight 2, 6  
  activating 6  
  pen stroke 21  
Batteries  
  auto-off delay 12  
  battery door 4  
  battery life 7  
  installation 5  
Brightness Control 3  
Button Preferences  
  19  
  pen 20, 21

### C

---

Calculator 116  
  clear 117  
  clear entry 117  
  memory 117

- menu commands 118
- recent calculations 118
- using screen 116
- Capital Letters 29
- Categories 38
  - address book
    - entries 70
  - defining new 40
  - expense 100
  - memos 91
  - merging 42
  - renaming 42
  - using in lists 39
- Command Stroke 128
- Contrast Control 3
- Copy
  - command 37
- Currency 101
  - choosing default 105
  - defining custom 105
- Cut
  - command 37

## ***D***

---

- Date
  - choosing in date book 50

- setting 12
- to do item 80
- Date Book
  - activating 45
  - alarm 57
  - choosing date 50
  - deleting events 63
  - event conflicts 54
  - event date 57
  - event details 56
  - event duration 47, 56
  - event start time 47, 56
  - go to date 51
  - menu commands 60
  - month view 55
  - repeat event 58
  - scheduling event 46
  - time display 46
  - untimed event 48
  - week view 52
- Disk Fulfillment 158
- Distance
  - expense item 103

## ***E***

---

- Edit Menu 36
- Event

- changing to
  - untimed 50
- choosing date 57
- conflicts 54
- date book
  - scheduling 46
- deleting 63
- details 56
- in week view 53
- repeat 58
- setting alarm 57
- start and duration
  - 47
- untimed 48
- Expense
  - activating 96
  - attendees 102
  - creating item 98
  - custom currency
    - 105
  - custom report 164
  - default currency
    - 105
  - details 100
  - item currency 101
  - item date 99
  - menu commands
    - 104
  - payment method
    - 101
  - printing reports
    - 111

- Quickfill 105
- receipt details 100
- show options 103
- templates 160
- type 101
- vendor 102
- viewing data 107

## **F**

---

- FCC Statement 180
- Find 113
- Finding
  - address book
    - entries 69
- Format Preferences
  - 14
  - country default 15
  - time format 15

## **G**

---

- Games 150
- General Preferences
  - 11
  - alarm sounds 13
  - auto-off delay 12
  - setting date 12
  - setting time 11
  - system sounds 13
- Go To
  - date 51
- Graffiti 25

- accent characters
  - 32
- alphabet 28
- capital letters 29
- command 37
- concepts 25
- editing shortcut
  - 127
- navigation strokes
  - 129
- numbers 29
- online help 37
- punctuation marks
  - 30
- shortcuts 124
- symbols 31
- tips 27, 33
- writing area 2
- writing characters
  - 26

Graffiti Help

pen stroke 21

## **H**

---

- Hard Reset
  - procedure 156
  - reset button 4
- Help
  - on-line tips 38
- HotSync

- communications
  - port 137
- conduit setup 146
- customizing 141
- HotSync Manager
  - 135
- local HotSync 135
- local speed 137
- modem speed 147
- options 139
- user profile 142
- via modem 144

## **I**

---

- Installing
  - applications 149
  - games 150

## **K**

---

- Keyboard 33
  - command 37
  - pen stroke 21, 34
  - screen options 34

## **L**

---

- Look Up
  - address book
    - entries 69

## **M**

---

### Memo

- arranging in list 90
- creating new 88
- deleting 93
- font size 89
- reviewing memos 89
- scrolling in 90

### Memo Pad

- activating 87
- arranging memos 90
- creating memo 88
- deleting memos 93
- menu commands 91

### Memory

- application 118
- calculator 117
- purge date book 61, 104
- purge to do list 84

### Menus

- activating 35
- address book specific 72
- calculator specific 118
- choosing 36
- command equivalents 127

date book specific 60

edit menu 36

expense specific 104

memo pad specific 91

to do list specific 83

### Modem

HotSync 144

Modem Preferences 16

### Month

date book view 55

## **N**

---

### New

address book entry 66

categories 40

date book event 46

expense item 98

Graffiti shortcut 126

memo pad memo 88

to do item 78

### Note 43

### Numbers

writing 29

## O

---

- On-Line Tips 38
- On-Screen Keyboard 33
  - menu command 37
  - screen options 34
- Owner Preferences 17

## P

---

- PalmPilot
  - application buttons 2
  - applications 22
  - assigning
    - password 120
  - backlight 2, 6
  - battery door 4
  - battery installation 5
  - changing password 122
  - common data 142
  - contrast control 3
  - controls 1
  - forgotten
    - password 123
  - HotSync cable 136
  - PalmPilot, cont'd
    - HotSync via
      - modem 144
    - install tool 149
    - installing
      - applications 149
    - locking with
      - password 123
    - memory door 4
    - menus 35
    - on-line tips 38
    - on-screen
      - keyboard 33
    - power button 2
    - private records 44
    - reset button 4, 156
    - resetting 156
    - safety tips 6
    - screen 2
    - scroll buttons 2
    - search for text 113
    - serial port 4
    - setup for HotSync 136
    - sound settings 13
    - starting 9
    - starting
      - applications 23
    - stylus 3
    - technical support 157

- troubleshooting
  - 151
- warranty 176
- writing text 24
- writing tips 27
- PalmPilot Desktop
  - customizing
    - HotSync 140
  - features 131
  - HotSync conduit
    - setup 146
  - HotSync options
    - 139
  - install tool 149
  - obtaining 3.5"
    - disks 158
  - removing 155
  - software
    - installation 132
  - synchronization
    - 135
  - system
    - requirements
      - 132
- Password
  - assigning 120
  - changing 122
  - forgotten
    - password 123
  - locking PalmPilot
    - 123
- troubleshooting
  - 153
  - with owner
    - preferences 18
- Paste
  - command 37
- Payment
  - expense item 101
- Pen
  - in button
    - preferences 20,  
21
- Phone Lookup 114
- Phone Numbers
  - choosing type 68
  - in address list 72
- Power Button 2
- Power Off
  - pen stroke 21
- Preferences
  - button 19
  - format 14
  - general 11
  - modem 16
  - owner 17
- Printing
  - expense reports
    - 111
- Priority
  - to do item 79
- Private

- assigning
  - password 120
- hiding records 121
- showing records 122

Private Records 44

Profiles 142

Punctuation Marks

- writing 30

Purge

- date book events 61, 104
- to do items 84

## **Q**

---

Quickfill 105

## **R**

---

Records

- attaching notes 43
- categories in lists 39
- choosing categories 38
- hiding private 120
- private 44

Repeat Event 58

Reset Button 4, 156

## **S**

---

Scroll Buttons 2

Search

- for text 113
- phone lookup 114

Security 120

- assigning
  - password 120
- changing password 122
- forgotten
  - password 123
- hiding records 121
- locking PalmPilot 123
- private records 44
- showing records 122
- troubleshooting 153

Select All

- command 37

Serial Port 4

ShortCuts 124

- deleting 127
- editing 127
- pre-defined 125

Soft Reset

- procedure 156
- reset button 4

Software

- obtaining 3.5" disks 158



- Software
  - Installation 132
- Starting
  - Applications 23
- Stylus 3
- System
  - Requirements 132
- System Sounds 13

## **T**

---

- Technical Support 157
- Templates
  - expense report 107
  - for expense report 160
- Text Entry
  - accent characters 32
  - capital letters 29
  - Graffiti ShortCuts 124
  - numbers 29
  - on-screen
    - keyboard 33
  - punctuation marks 30
  - symbols 31
  - with PalmPilot 24
  - writing tips 27

- Time
  - alarm setting 57
  - format 15
  - setting 11
  - setting event 47, 56
- Tips 38
- To Do List
  - activating 77
  - checking off item 79
  - completed items 82
  - completion date 82
  - creating item 78
  - deleting items 85
  - item details 80
  - item due date 80
  - item priority 79
  - menu commands 83
  - show due dates 82
  - show due items 82
- Troubleshooting 151
- Turn Off
  - pen stroke 21

## **U**

---

- Undo
  - command 37
- Untimed Events 48
- User Profile 142

## **V**

---

Vendor 102

## **W**

---

Week

date book view 52

Writing

accent characters  
32

capital letters 29

Graffiti ShortCuts  
124

numbers 29

on-screen

keyboard 33

punctuation marks  
30

symbols 31

text with PalmPilot  
24

tips 27