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THE COMPLETE IDIOT'S GUIDE® TO

"Gralla combines wit and wisdom to show PalmPilot owners how to be more productive. His advice covers both business and personal use. A MUST read!" —Michael Steinberg, Co-founder and President, New England Palm Users Group

Includes Que's Plus Pack—software and games for PalmPilot

PalmPilot™ and Palm III™

- **The quick and easy** way to organize your life with a hand-held computer
- **Idiot-proof steps** to using the Date Book to organize your schedule
- **Down-to-earth advice** when the going gets tough

Preston Gralla

Dear Reader:

Work is too long and life is too short. There's so much to keep track of in your life and so little time to do it in, that it seems there's never time to get anything done. But imagine that you suddenly had 30 hours in a day, nine days in a week, and 65 weeks in a year to do what you wanted to do. Life would be a whole lot easier, wouldn't it?

Well, that's what your PalmPilot can do for you—it can help you get your life under control. It can track deadlines, appointments, contacts, to-dos, and more, and make even the most harried of us on-time, up-to-date, and under control. All you need to do is master your little digital companion and learn some simple techniques for having it help you organize your life.

That's what this book will do for you. It'll teach you how to use every feature of the PalmPilot in a snap, and then show you how you can use those features to get your life under control. Whether you're looking to master the Address Book, the Date Book, the Memo Pad, the Expense feature, the To-Do List, HotSync, or any other part of the PalmPilot, this book will help you do it in a matter of minutes. And it teaches you how to troubleshoot and fix your PalmPilot yourself should anything go wrong with it.

But it doesn't stop there. It teaches you how to use the power in PalmPilot to master your life as well. Need to make business travel easier? I show you how the PalmPilot can do it. Want to streamline your schedule, make sure you don't miss appointments, and get extra time in your days? It's in here. Want to track your expenses, send data back and forth to Excel, and even create your own customized expense reports? How about making sure you don't miss another deadline, or keeping track of important people and addresses? Yes, that's all in here and a whole lot more, as well. I even show you how you can use the PalmPilot to hook up to the Internet and get vital reference information, such as travel schedules, business data, the latest news, and more. And you'll learn how to find and install new software, such as programs for faxing and paging, as well.

As a bonus, I've put together a great CD filled with software that will help you get the most out of your PalmPilot and make your life easier and more productive. As the top editor for the Internet site www.palmpilotsoftware.com, I know all the best software out there, and I've put it onto the CD for you.

So, whether you just want to know the best way to use the PalmPilot, or are looking for advice on how to use it to get your life under control, you'll find it all in this book—along with tips on how to care for the little creature, a comprehensive guide for troubleshooting the PalmPilot, and yes, even an appendix that will literally have you teaching your little digital companion entertaining diversions and stupid digital tricks. So give the book a try, and then get your life under control. The PalmPilot has certainly done that for me, and I'm sure it'll do the same for you as well.

Preston Gralla

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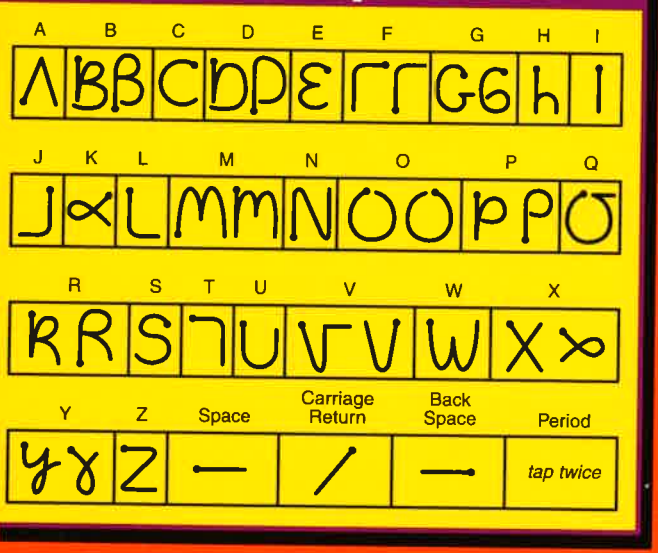
Graffiti Alphabet



Graffiti Numbers

Graffiti Punctuation

que

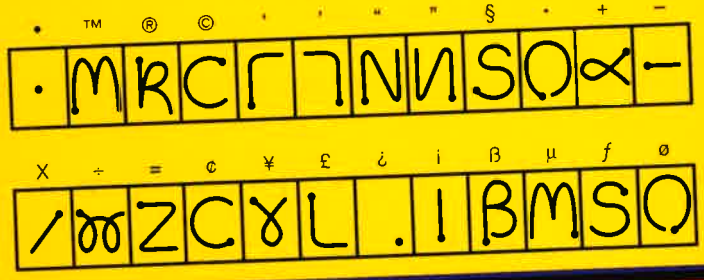
Writing Symbols and Extended Characters

All writing symbols and extended characters begin with the Shift stroke in the Graffiti writing area of your Palm III:

Shift

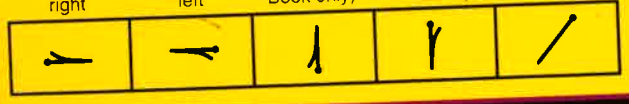
Symbols and Extended Characters

When the Symbol Shift is active, a slanted Shift symbol appears in the lower-right corner of the screen. The next stroke that you make creates the symbols or extended characters shown in the following table:



Graffiti Navigation Strokes

Move cursor right	Move cursor left	Previous field (Address Book only)	Next field (Address Book only)	Open address record (Address Book only)



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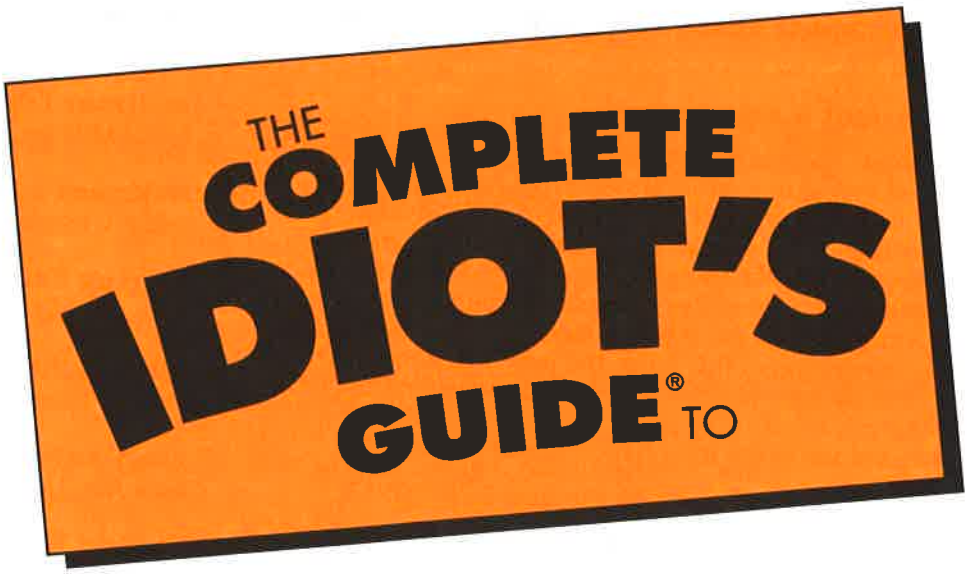

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by Preston Gralla

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Chapter 2

Prepare to Get Organized: A Guided Tour of the PalmPilot

In This Chapter

- Learning about the PalmPilot's screen, contrast controls, and backlight buttons
- Understanding what the application and silkscreened buttons do
- Using the Graffiti writing area
- Taking a look at what the controls in the back of the PalmPilot do
- Learning about the battery, infrared port, and serial port

Before you can get your life organized with your little digital companion, you first need to know how the thing works. Before you can do that, though, you need to know what all the little buttons, gizmos, recessed slots, and other neat things are there for. Maybe you can't tell a book by its cover, but you *can* judge the PalmPilot by its outer case.

In this chapter, you take guided tour of the PalmPilot. You're going to look at the PalmPilot's case, screens, cradle, and other assorted features. I don't cover in detail the software that comes with it. For that information, turn to Chapter 4, "Organization 101: Touring the PalmPilot's Main Screen."

Are You Really Sure This Thing Is a Computer?

The first point to realize about the PalmPilot is that, yes, it is in fact a computer. It may not look like one; after all, it has no keyboard, no monitor, no mouse, no disk drives, no incomprehensible error messages, and no inane computer commands that

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sound as if they were written by someone for whom English is a seventh language, and poorly spoken at that. I mean, can something this small, this approachable, and dare I say it, this cute (uh oh, clearly I've been spending too much time alone with my Palm III...) actually be a computer?

Yes, it can be. Inside the hard case is a little microprocessor, just like a microprocessor is inside your PC or Mac. The PalmPilot also contains memory and built-in software that do all the things I'll talk about later that help you organize your life. In fact, the PalmPilot contains more memory and power inside it than was in many of the original desktop computers back in the dark ages of the 1980s.

What microprocessor is inside the PalmPilot?

For the geeks of the world who care about such things, the Palm III is powered by a Motorola 68328 chip.

The major difference between the PalmPilot and PCs and Macs is that the PalmPilot was designed for one purpose alone: to help you get your life under control. Because of that, you won't find the wide range of software on the PalmPilot that you'll find in a normal computer. And you won't be able to plug all kinds of things into it, such as scanners and printers—although you can hook up your PalmPilot to a modem to get email and browse the Web, as you'll see in Part 3, "Using Email, Internet, and Infrared Communications to Keep You in Touch."

What you will find in the PalmPilot, though, is a little computer that's been designed from the ground up to help you organize your life, and the built-in software helps you do just that. Because you carry it around with you, you get information into the PalmPilot not via a keyboard or mouse, but instead by writing with your stylus in a special area of the PalmPilot. Handwriting-recognition software built into the PalmPilot takes your keystrokes and turns them into letters. You tap on the screen to do a lot of your work as well.

Checking Out the Front Panel and Controls

It's time to start your tour of the PalmPilot. (I know, it's not quite the same as a guided tour of the Loire Valley in France, but on the other hand, the PalmPilot costs only a little over $300—and just try to get a tour of the Loire at *that* price.) What better place to start than the beginning, with the PalmPilot's front panel and controls—basically, the front of the device.

Check out the following figure, which shows you the front of the PalmPilot with all the parts and pieces labeled. You're looking at a Palm III. Other versions of the PalmPilot are similar but not identical.

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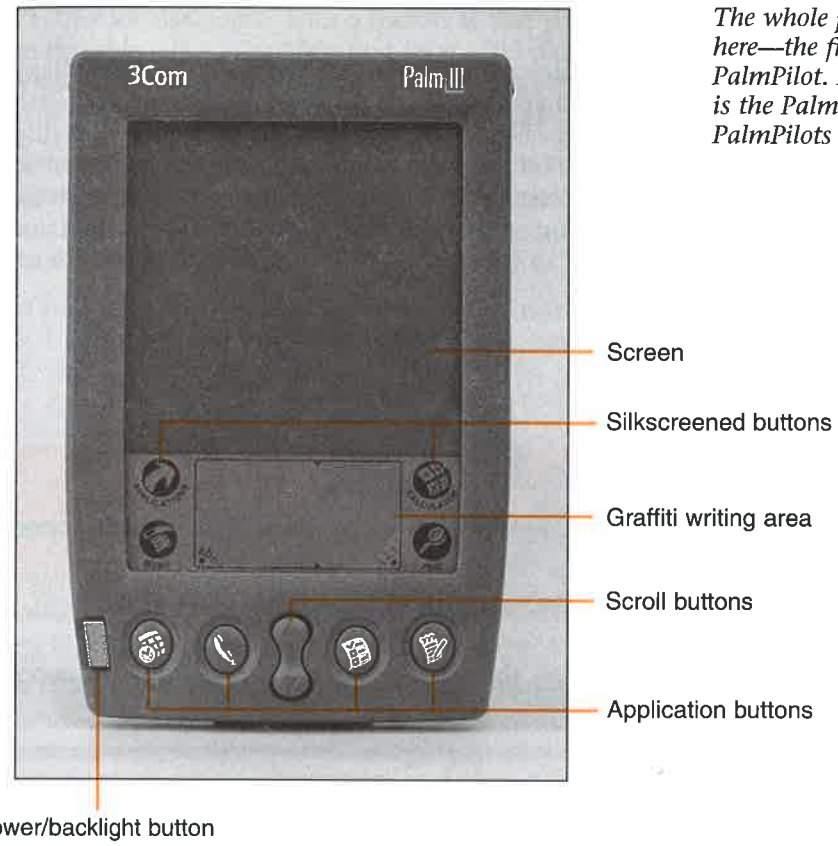

The whole process begins here—the front of the PalmPilot. Pictured here is the Palm III, but other PalmPilots are similar.

As you can see, the front of the PalmPilot has on it the following:

- The screen
- The power and backlight button
- The application buttons
- The scroll buttons
- The silkscreened buttons
- The Graffiti writing area
- The flip case

Next, I describe what you need to know about each of these areas to help you organize your life.

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Looking at the Screen

The screen, also called the display area, is the place where all the action happens. Here, all the programs run, and you see all the stuff you're tracking, such as your To-Do List, memos, addresses, and calendar. The screen does more than just display information, though. It's also a touch screen, which means that when you run programs, you touch the screen with the stylus to perform certain tasks, such as scheduling an appointment by touching on the time and date of the week when you want it scheduled.

You can use things other than a stylus on the touch screen.

You use the stylus that comes with the PalmPilot on the touch screen. But nothing special in the stylus makes the touch screen work; you can use other things as well. Some people use their fingertips, and you can buy a variety of stylish styli as well. Be careful not to use a normal pen or pencil on the screen, though, because writing on it with ink or pencil can damage it.

Icons (little pictures) on the screen represent all the programs in your PalmPilot. To run a program, touch the icon with your stylus. The following figure shows the icons on the screen.

It's touch and go: Tap any of the icons on the screen to run a program.

Powering Up with the Power and Backlight Button

You want to turn on your PalmPilot? Press the power and backlight button. You want to turn it off? Press again. Simple, no? Notice that when you turn your PalmPilot on or off, it starts up or shuts off instantly, unlike a computer, which takes about two or three decades to do the same thing, give or take a year or two.

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The PalmPilot also comes with a backlight that you can turn on to make the screen more readable. (The Pilot 1000 and Pilot 5000 didn't have this backlight. Pity their poor owners; they're all being fitted for glasses right now.) The backlight has a nice kind of green eerie glow to it—kind of an underwater, aquarium-like light.

To turn on the backlight, press down the power and backlight button for about two or more seconds (if you press down for less time, you'll turn off the PalmPilot). To turn off the backlight, press down again for two or more seconds (and if you press down for less time, you'll turn off the PalmPilot).

I can find only one problem with the backlight feature: It sucks up battery juice big time. Use it a lot, and you'll be changing your batteries several times a month.

WriteRights can diminish screen glare and protect your screen.

Some people feel that the PalmPilot's screen has too much glare on it and therefore is difficult to read. Also, screens sometimes can be scratched. You can reduce the glare and protect your screen by buying WriteRight screen protectors at `www.conceptkitchen.com`. The protectors also make it feel as if you're writing with your stylus on paper instead of on glass. A year's supply of 12 costs about $27.99.

Running Software with the Application Buttons

The application buttons are the four large buttons that run across the bottom of the PalmPilot. You press these buttons when you want to run a particular piece of software, such as the Memo Pad or Address List, to help you organize your life. Why are the buttons called "application buttons" when they, in fact, run software? They have this name because another term for *software* is *application*.

Pictured in the following figure are the four buttons, labeled according to what program they run when you press them.

When you're running your PalmPilot, just press any of these buttons, and you immediately switch to that program. Let me give you a little timesaving tip: If your PalmPilot is turned off and you want to run one of these programs, you don't need to turn it on and then press the application button. Instead, just press the application button. The PalmPilot turns on and jumps you right into that program.

Read this rundown on what each of the buttons does. I'll cover all this information in more detail in Chapter 4, "Organization 101: Touring the PalmPilot's Main Screen."

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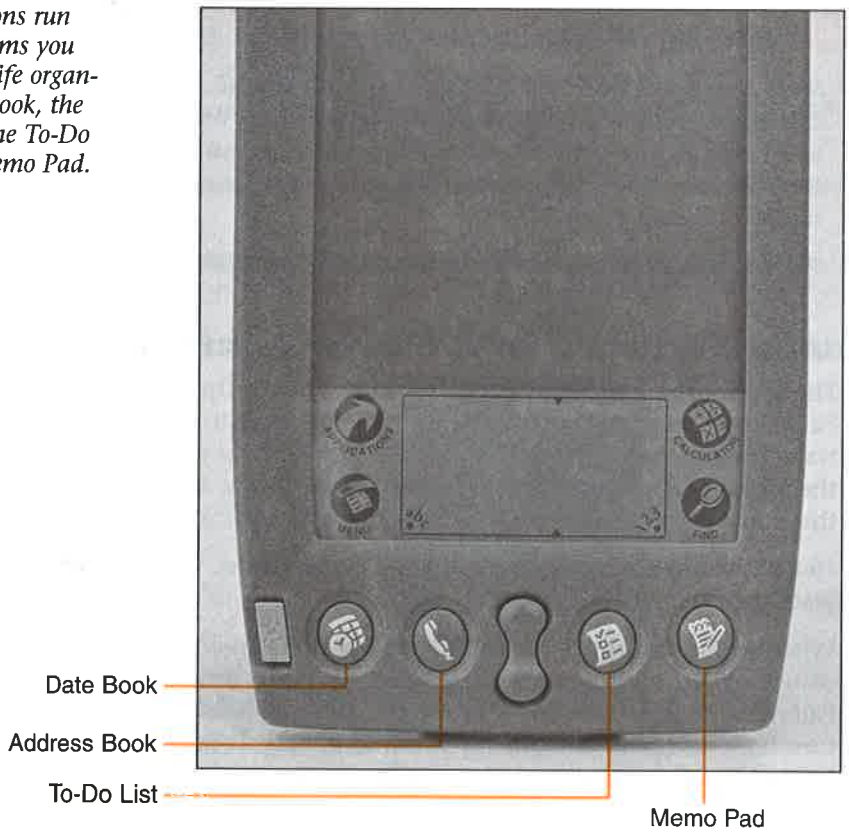
- **Date Book** The left-most button with the picture of the clock in front of a warped-looking calendar runs the Date Book. This calendar program helps you keep track of your schedule, appointments, and meetings. Use this program, and you'll never again show up at the doctor's office for an appointment that you never scheduled—when you, in fact, are supposed to be in Denver giving a presentation at the annual sales meeting.
- **Address Book** The next left-most button button with a tiny picture of a telephone runs the Address Book. Here, you keep track of names, phone numbers, and addresses, including email addresses.
- **To-Do List** The next-to-last button with the little picture of an odd-looking piece of paper with checks and boxes on it (skipping the scroll button) runs the To-Do List. Here, you—well, yes, you guessed it—keep track of all the things you have to do.
- **Memo Pad** The rightmost button with the picture of a reporter's notebook and pen runs the Memo Pad. Not hard to imagine what the Memo Pad does—it lets you write memos.

These four buttons run the main programs you use to get your life organized: the Date Book, the Address Book, the To-Do List, and the Memo Pad.



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Make your life easier by reassigning the application buttons.

Maybe you find yourself hardly ever using the Memo Pad, but you run the PalmPilot's Expense program all the time to track your expenses. Wouldn't it be nice if you could run Expense by just pressing the Memo Pad button?

Yes, it would be nice, and yes, you can do it. You can reassign any of the application buttons to run any PalmPilot program. Check out Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work," to see how to reassign buttons.

The Scroll Buttons

Right smack dab in the center of the bottom of the PalmPilot are the scroll buttons. On a Palm III, the buttons are combined into one large button in a kind of distended hourglass shape. Earlier models have two separate buttons.

You use these scroll buttons to see what's on the screen above or below what's currently showing. You scroll through a screen by pressing these buttons. Press the up button to scroll up, and press the down button to scroll down. (See, I told you the PalmPilot was easier to use than a computer. If the PalmPilot were a PC, the buttons would probably be called "Tactile-Sensation Screen Application Positioning Hardware Modules (TSSAPHMs)" and "up" would go down, and "down" would go up. Then Bill Gates would try to make that a standard for the world.)

The Silkscreened Buttons

On the bottom portion of the glass front of the PalmPilot are four "buttons" that, in fact, aren't physical buttons at all; they're button shapes that have been silkscreened onto the glass. Tap them with your stylus, though, and they work just like buttons and run programs or perform functions. With these buttons, unlike the application buttons, you can't tap on them to turn on the PalmPilot.

Pictured in the following figure are the four buttons, labeled according to what program they run when you press them.

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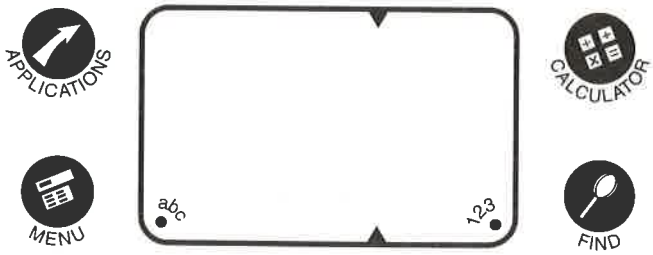
Tap and run: Here, you see the four silkscreened buttons and what each of them does when you tap on it with the stylus.



The **Applications** button brings up a list of all the programs on your PalmPilot, as you can see in the following figure. I'll cover all these programs in more detail in Chapter 4, "Organization 101: Touring the PalmPilot's Main Screen."

You see all the programs on your PalmPilot when you tap on the Applications button.

The **Menu** button runs a menu in any program that you're currently running. A menu on the PalmPilot isn't something that you order food from; instead, it lists for you all the tasks you can perform in a program you're currently running, such as cutting and copying text, adding an event to your calendar, and deleting records. The following figure shows the Date Book's menu. Turn to Chapter 8, "Taking Control of the PalmPilot's Applications, Menus, and Records," for more information on how to use the menus. Not only are the menus big time-savers, but they also contain many options that will help you organize your life better. Now if only I could find an option that added two hours to a day, that's one I would use all the time....

When you tap on the Menu silkscreen button when you're in the Date Book, you see this menu.

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The **Calculator** button runs a calculator, which does pretty much what you would expect a calculator to do—it calculates. (What a concept!) Tap the numbers and functions on the calculator, and it does math magic, as you can see in the following figure.

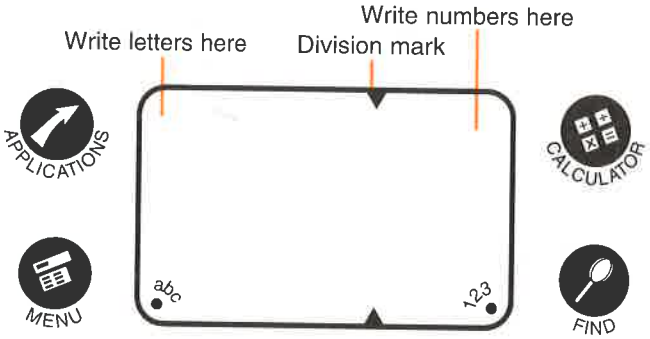
Doing math magic is easy on the PalmPilot when you use the Calculator.

The **Find** button helps you find stuff on your PalmPilot. Tap on the button, and you get a screen, as you can see in the following figure, that lets you type in a word to search. Then tap **OK**, and you find every single item on your PalmPilot that includes that word—whether it be a name or address, a To-Do item, or an entry in the Date Book. You name it; the PalmPilot finds it. Now if it could only find those socks that keep vanishing from my dryer.

You can search using the PalmPilot's Find feature.

The Graffiti Writing Area

Finally, a way to write graffiti without being arrested for vandalism. To get information and other stuff (*stuff:* a technical term meaning "things") into your PalmPilot, you use a stylus to write in the Graffiti area, shown in the following figure. To write things, you use a special kind of alphabet called *Graffiti*. It's a lot like the regular alphabet, with only a few minor changes. I'll cover more details about Graffiti in Chapter 7, "Digital Magic: Taking Notes with Graffiti.



Write Graffiti without getting arrested for vandalism: You enter text and numbers into your PalmPilot here.

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The Graffiti area is divided into two sections. On the left section, you write letters. On the right section, you write numbers. Believe it or not, when people start using the PalmPilot, one of the biggest mistakes they make is trying to write numbers in the letter area. Don't do it. It won't work. The first time I tried it, I wanted to write the number *5270836*, and it came out *Sztobyg*, which sounds a lot like the town in Poland where my grandfather grew up.

Notice that the letters *abc* are printed on the lower-left corner of the Graffiti area, and the numbers *123* are printed on the lower-right corner. They're available to help you put in text and numbers. Tap on the button next to *abc*, and a little keyboard pops up with all the letters of the alphabet. Tap a letter on the keyboard, and you input that letter. Tap on the little button near the *123*, and a number keyboard pops up instead. You'll find this feature is a great help for inputting oddball characters (and no, it's not me I'm talking about) such as > or %.

Use Graffiti cheat sheets.

When you buy a PalmPilot, you get a set of Graffiti recognition stickers, which are essentially cheat sheets that show you the Graffiti alphabet, for quick reference. If you have a Palm III or higher, you can make sure they're always at hand by trimming them slightly and pasting them inside the Palm's flip cover. That way, whenever you're unsure of how to write a character, the answer is staring you right in the face.

Flipping About the Flip Case

The flip case is a plastic case that comes with the Palm III and later PalmPilots. When you want to use your PalmPilot, you flip up the case. When you're done, flip it down. The metal case protects the screen and the front of the PalmPilot. If you're fashion-minded, you should know that you can replace your flip case with a different-colored one. Fuchsia, anyone?

Using the Back Panel Doors, Buttons, Ports, and Gizmos

Okay, now it's time to turn your PalmPilot on its back. Don't worry; it won't be upset. It's used to this kind of thing.

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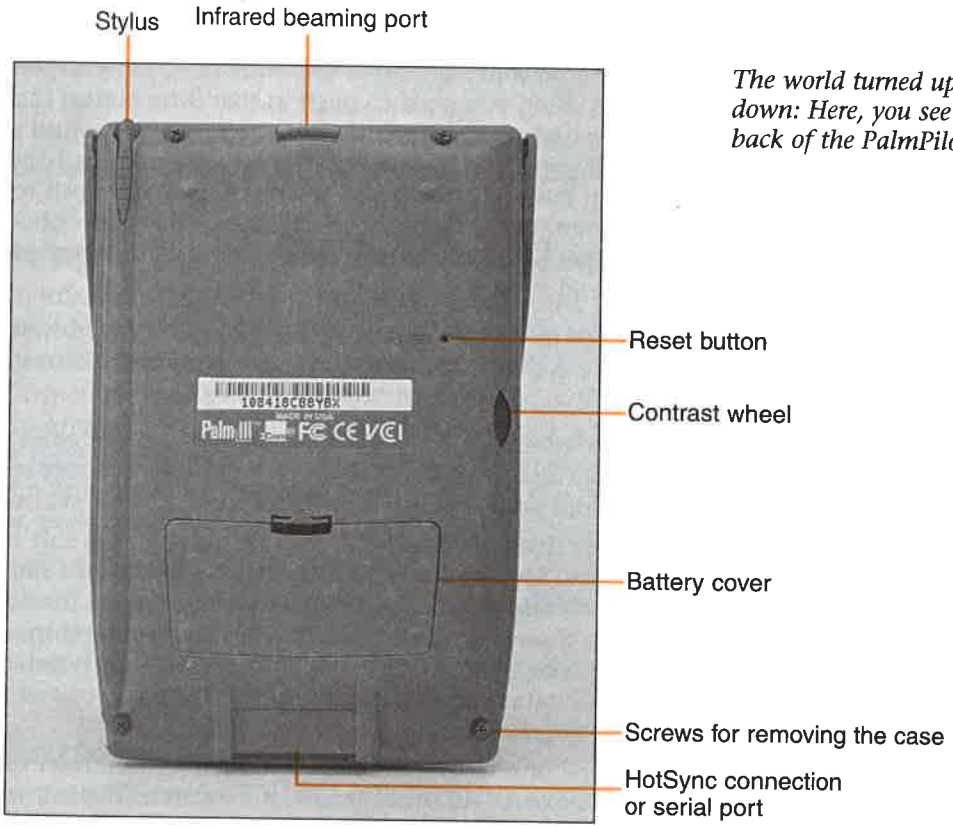
Back here, you find a variety of things that you don't use as commonly as all the gizmos, gadgets, and widgets on the front of your PalmPilot. I'm not saying that this stuff isn't important; in fact, without all the things hidden back here, your PalmPilot couldn't run.

Check out the following picture, which shows all the different things on the back of the PalmPilot—in this instance, on a Palm III. As you can see, the back of the PalmPilot has on it the following:

- A stylus
- A reset button
- A contrast wheel
- A battery cover
- An infrared beaming port
- A HotSync connection, also called a serial port (By the way, this serial port looks very different from the one on your computer, so don't look for one like that here.)



The world turned upside down: Here, you see the back of the PalmPilot.

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Next, you learn what you need to know about each of these elements before getting your life organized.

The Stylish Stylus

The stylus slips into a slot in the back of your PalmPilot. You use it to write Graffiti and use the touch screen. The Palm III and higher comes with a stylus with a metal barrel that feels more comfortable and substantial than the all-plastic stylus that came on earlier models. You can also buy a replacement stylus if you want.

The Reset Button

Sometimes bad things happen to good people. Yes, even to you. And to your PalmPilot as well. Your PalmPilot could freeze, lock up, and appear to go kaput. When you try to turn it off by pressing on the **On/off** button, it doesn't even turn off. It just sits there, refusing to move or do anything, like a stubborn child. More often than not, you have this problem because you've installed some kind of software that doesn't get along with your PalmPilot.

So what to do? You need to reset your PalmPilot. At this point, the little reset button comes in. Well, it's not really a button; it's more a tiny little hole, but everyone calls it a button. To reset your PalmPilot, you need to push in that little button inside the hole. If you own a Palm III or higher, screw off the top of your stylus to find a little wire-like thing you can use. If you don't have a Palm III, straighten out a paper clip and use it to push the button. Push only until you hear a click. If you push too hard, you could damage the PalmPilot. By the way, some engineers, who know about such things, worry that using a paper clip could cause damage because it's metal pushing against metal. They recommend instead using a toothpick.

You can perform three kinds of resets with your PalmPilot, depending on how bad a problem you've come across: a soft reset, a warm reset, or a hard reset. You can do each as follows:

- **A soft reset** This type of reset turns off your PalmPilot and unfreezes it. Now you're ready to start work again. No damage done. You perform a soft reset by pushing the wire on top of your stylus or a paper clip inside the reset button.
- **A warm reset** You try this type of reset if, for some reason, the soft reset doesn't solve the problem. Soft resets might not solve some kinds of startup problems. For these problems, you might have to do a warm reset. To do a warm reset, press down on the **Scroll Up** button. While you're pressing it, push the wire on top of your stylus or a paper clip inside the reset button. When you do a warm reset, none of your data is erased; it remains safe. Any add-ons or patches you added to the PalmPilot, however, are erased.
- **A hard reset** This type of reset is more hardcore than a warm reset or a soft reset. Use it only if you have to—in other words, if a soft reset doesn't work. A hard reset erases all the information you've put into your PalmPilot—and I

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mean everything, including your name. It basically puts the PalmPilot back to the way it was when you unpacked it from the box. This is not a good thing. To do a hard reset, hold down the **on/off** button and push the wire on top of your stylus or a paper clip inside the reset button. You then get a message asking whether you really, really want to do a hard reset. If you do, press the **up** button. If you don't, press the **down** button.

All is not lost if you do a hard reset.

If you do a hard reset, you probably figure your life is gone; all your appointments, your contacts, your To-Do List, and everything else have vanished. Don't give up hope, though; you can restore all that information in various ways. Turn to Chapter 24, "Cures for the PalmPilot's Most Common Problems," for details on how to restore.

For more information about hard, warm, and soft resets, and troubleshooting in general, turn to Chapter 24, "Cures for the PalmPilot's Most Common Problems."

Beaming Up with the Infrared Beaming Port

The infrared beaming port, which is located at the top of the Palm III and higher, is covered by a little red piece of plastic. Get ready for science fiction time—except this is real, not make-believe. If you have a Palm III or higher, you can actually beam information to other Palm III and higher owners. Want to exchange business cards with another Palm owner? Forget about old-fashioned paper; just point your Palm in the right direction, and all your contact information is sent straight to his or her Palm and shows up in the Address Book. You can beam anything over—memos, to-dos, even entire programs.

That's the good news. The bad news is that you can't use the infrared port with other kinds of equipment; for example, you can't beam information to a computer that has an infrared port. If you own a WorkPad, however, you can create a HotSync by using the beaming port and the IR port of an IBM ThinkPad.

The Battery Door

Your PalmPilot runs on two ordinary AAA batteries. To put them in your PalmPilot, just open the little door, pop in the batteries, and you're done. Just one word of

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advice: Don't linger when you're replacing your batteries. If you take batteries out and then take too long to put new ones in, you lose all your data; it's kind of like doing a hard reset. Because of that, doing a HotSync (see details in "Rocking the Cradle") is always a good idea before you replace your batteries. That way, if you lose everything, you still have a copy on your desktop computer and can get it back into your PalmPilot.

By the way, get used to opening and closing this door because you're going to use it a whole lot. If you use your PalmPilot with any regularity, you'll be shuttling batteries in and out of there real fast. For advice on how to keep power consumption to a minimum, head to Chapter 25, "Care and Maintenance of Your Digital Companion."

Remembering the Memory Door

Now let me see. What was I going to write about? I can't seem to remember.... Oh, that's right, the memory door. You can add more memory to your PalmPilot, and you can also upgrade an older version of the PalmPilot to a newer version by putting in a special card. You do so by opening the memory door, taking out the old memory card, and putting in a new one. In Palm III and higher models, you open the memory door by unscrewing the four tiny screws at the four corners at the back of the Palm. In earlier models, you put a straightened clip into a small pinhole in the center of the memory door.

The Contrast Wheel

One thing is not so great about PalmPilots: Their screens can be hard to read. Being able to read the screen is especially a problem when you use it in different kinds of light—for example, in a dim room versus in full sunlight. You therefore should become best friends with the contrast wheel. Using it, you can change the contrast to best suit the lighting you're currently working in. I suggest adjusting it every time you turn on your PalmPilot.

You also might find that if you regularly use the contrast wheel, you don't have to use the backlighting as often. When you use backlight, you drain your batteries quickly, so using the contrast wheel saves you time and money. And isn't that the main reason you bought a PalmPilot in the first place?

The Serial Port

No PalmPilot is an island; it's best used along with your desktop computer. To send stuff back and forth between your computer and your PalmPilot, you need to connect your PalmPilot to something. The serial port comes into play for this task. It connects your PalmPilot to the world. You can place your PalmPilot onto a cradle (see the next section) that hooks into the serial port, and that cradle then connects to your computer (the hip bone's connected to the leg bone; the leg bone's connected to the thigh bone; the thigh bone's connected...).

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You also can buy a neat little modem that plugs into your serial port and then use your PalmPilot to cruise the Internet, send faxes, and send and receive email. You can also buy a modem cable that connects your serial port to a regular modem.

The PalmPilot has such a devoted following that people have come up with all kinds of crazy things to hook into the serial port. I've tried a Global Positioning System (GPS), for example, that tells me exactly where I am on Earth. (Of course, I know that already, but having a satellite and a PalmPilot tell me things I already know is a whole lot more fun.) You can even buy a little gizmo called a TaleLight that, in essence, turns your PalmPilot into a teeny-tiny flashlight. The wonders of technology! Who would ever have thought it would be so easy to make a $300.00 piece of hardware do everything that a $2.95 penlight could do?

Rocking the Cradle

As I mentioned before, you can hook up your PalmPilot to your desktop computer and then synchronize all the data between the PalmPilot and your computer. That way, whether you're working on your computer or your little digital device, all the information you have will match. So, if you put a to-do item on your computer, for example, it automatically is sent to the PalmPilot. And if you put a contact in your Address Book, it automatically is sent to your computer. This process is called *doing a HotSync*.

This magic works by using the cradle, shown in the following figure. You put your PalmPilot into the cradle, connect the cradle to the serial port on your computer, press a button, and voilá, you've done a HotSync. You should HotSync at least once a day, not only to make sure everything's up-to-date, but also to make sure that you have all the information you need should your PalmPilot require a hard reset.

The cradle lets you synchronize the information between your PalmPilot and your computer.

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The Least You Need to Know

- To run any of the programs on the PalmPilot, press or tap on the right button. The application buttons turn on the PalmPilot as well as run programs.
- You use the stylus to input data into your PalmPilot, but you can use other things on the touch screen as well.
- The backlight feature makes the screen more readable, but it uses a lot of battery power.
- You can use the contrast control to make the screen easier to see and to cut down on having to use the backlight feature.
- You use the infrared port to exchange information with other Palm III and higher users, but you cannot beam information to desktop computers.
- The serial port and cradle allow you to HotSync information between your PalmPilot and desktop PC.

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Chapter 3

Time for Takeoff: Starting Your PalmPilot for the First Time

In This Chapter

- Installing the battery and turning on the PalmPilot
- Calibrating the PalmPilot's screen
- Using the contrast wheel
- Customizing the PalmPilot's main preferences for the way you work and live

By now, you know what a PalmPilot can do, and you've taken the grand tour of its outer case. So now it's time for takeoff; you're ready to launch the PalmPilot to help you get your life under control. Before you can use it to help organize your life, though, you first need to turn the thing on and fire it up.

So let me tell you what you need to know and do when you start your PalmPilot for the first time.

Let's Start at the Beginning: Take It Out of the Box

You've got your new PalmPilot. You've taken it out of the box. Now what?

The first thing you'll probably notice is that reading your PalmPilot's screen is difficult. That's because the screen has a film over it. Peel it off. Okay, the screen is easier to read now. That was simple, wasn't it? Time to move on.

Add the Juice: Installing the Batteries

Before your PalmPilot can do anything, it needs some juice. (Most mornings, I must admit, I feel the same way.) So you need to install the batteries. Turn the PalmPilot onto its back and find the battery door. It has a little plastic tab there. Press on it with your finger, and take the door off. Now put in two AAA batteries. (3COM kindly provided some for you when you bought the PalmPilot.) Make sure that you put the + and – ends in the proper places inside. Just look for the labels. Make sure not to force the battery door closed. If it doesn't close smoothly, you might have put the batteries in incorrectly, so take them out and try putting them in again.

"Ultra" batteries can mean a longer battery life on your PalmPilot.

One of the most annoying things about the PalmPilot is that batteries don't go a long way, especially if you use the backlight on your screen very much. A new breed of batteries can help. Duracell has released what it calls the "Ultra" line of AAA batteries, designed specifically for electronic equipment. People who have used these batteries in their PalmPilots (including yours truly) report that they last longer than normal batteries, so you don't have to keep popping open the battery compartment and installing new batteries.

Although batteries don't last very long on a PalmPilot, you can at least always tell how much battery juice you have left. On the top of the applications screen is an easy-to-read battery gauge.

The battery gauge tells you how much juice is left. Here, you see a full gauge—a rare sight on a PalmPilot.

By the way, you don't need to worry that your batteries will run out without your knowing about it. You get a warning when your batteries are low, advising you to change them. When you get the warning, follow the advice so that you don't lose any data.

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When you add new batteries, make sure that you put them in fairly quickly. If the PalmPilot is without batteries for more than several minutes, it loses all your data.

Why doesn't the PalmPilot lose all its data the second you take out its batteries?

Built into the PalmPilot is a little electronic gizmo called a *capacitor*. A capacitor can hold an electric charge for a certain amount of time. When you take out the battery, the capacitor takes over and supplies power to the PalmPilot. Its charge runs down after several minutes, though, so if you take a long time putting in the batteries, your data goes kaput.

Switching On Your PalmPilot

Now let me tell you about another easy part. After you put the batteries in, it's time to turn on the PalmPilot. Press down on the **on/off** button to turn on the PalmPilot. It turns on instantly. If you hold down the button for two seconds or more, the backlight turns on if you have a Palm III or PalmPilot. (No backlight screen is available on a Pilot 1000 or Pilot 5000.) The backlight makes the PalmPilot screen easier to read but also uses up the battery more quickly—so as the saying goes, you makes your choices and you takes your chances.

Calibrating the Screen

As soon as the PalmPilot turns on for the first time, you see a screen asking you to tap with your stylus in the center of a target three different times. You need to follow this direction to *calibrate* the screen—to make sure that when you tap somewhere on the screen, the PalmPilot interprets it properly.

After you calibrate your screen, you'll probably never need to calibrate it again. If you do need to recalibrate it, though, you can do so easily enough. To find out how, check out "Bend the PalmPilot to Your Will: Setting the Preferences," later in this chapter.

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Why does the screen need to be calibrated?

The screen on your PalmPilot is made up of two layers: one that displays all the text and graphics, and another, invisible one that detects where your stylus is touching, tapping, and writing. For the PalmPilot to correctly interpret your taps, it needs to understand how to synchronize these two different layers. Because everyone holds the PalmPilot at a slightly different angle, and because some people are right-handed and others left-handed, you need to go through the calibration routine before you start using it.

Can We Have Some Light Here? Adjusting the Contrast

The PalmPilot's screen is less than stellar. In certain lighting conditions, reading it can be pretty tough; you might find yourself squinting at the thing and turning it to all kinds of different angles to read anything. Before turning on the backlight, however, you should adjust the contrast on it. Move the contrast wheel until you find a contrast that's comfortable for you. Also, make sure to adjust the contrast every time you use the PalmPilot, not just when you turn it on for the first time, because the kind of light you're working in affects how well you can read the screen. Your eyes will thank you for it.

Bend the PalmPilot to Your Will: Setting the Preferences

You want to be master of the universe. Nations should bow down to you. Planets should accede to your wishes. The cosmos should obey your commands.

Well, maybe that's aiming a little high. Why don't you settle instead on bending the PalmPilot to your will? You'll find that controlling the PalmPilot can do more than give you an ego boost; it also makes organizing your life much easier. As you'll see, you can easily customize the PalmPilot for the way you live and work.

You can customize virtually every aspect of the PalmPilot—down to even what the buttons do when you press them. In this chapter, though, I just cover the basics of customizing this little tool the first time you turn it on. For information about how to make every aspect of the PalmPilot work the way you want, turn to Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work."

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So where to begin? Well, right after you finish calibrating the PalmPilot, the Preferences screen appears, as shown in the following figure. Here, you can become master of the universe—or at least czar of your PalmPilot.

Bend the universe to your will, or at least customize your PalmPilot to your liking. You do so by working from the Preferences screen.

As you can see, this screen lets you customize the following:

- The time
- The date
- The auto-off feature
- The system sound
- The game sound
- Whether to enable your PalmPilot to receive beamed data from other PalmPilots

Next, let me tell you what you need to know to customize each of the general preferences.

Customizing the Time and Date

Don't be surprised if the PalmPilot has the time and date wrong when you first turn it on. I've unpacked and installed a good number of them, and the time and date have been wrong every time. Considering that you want to keep your life on schedule, you should first set the time and date.

Getting the time and date right on the PalmPilot is a breeze. To set the time, tap on the time, and you see the following screen. Tap on the number you want to change, or use the arrows to change the time, and tap on AM or PM. That's it; you're done.

You can set the time here on the Palm III.

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Setting the date is as easy as setting the time. Tap on the date, and a calendar pops up, as shown in the following figure. Tap on the current month and then the current date, and tap on **Today**. The time is now set.

Before you travel to another time zone, reset the time.

When you're traveling, you can easily forget to reset the time on your PalmPilot. If you don't reset the time, any alarms and reminders you've created for yourself will go off at the wrong times. When traveling, make sure that you're always where you need to be when you need to be there by resetting the time *before* you head off on your trip.

You set the date on the Palm III by using this calendar after you tap on the date in the Preferences screen.

Does the PalmPilot suffer from the "Year 2000" bug?

Some computer programs have a bug that doesn't allow them to operate properly or work at all when the date gets to the year 2000. PalmPilot owners need not worry; the PalmPilot will work fine well into the next century and beyond.

Setting the Auto-Off Delay

You can easily forget to turn off your PalmPilot, which can be a big problem, because it uses so much battery juice when it's turned on. If you leave it turned on and forget about it, the battery winds down, and you lose everything you have stored there.

Because of this potential danger, the PalmPilot has a clever auto-off feature. After a certain amount of time, it switches off automatically. Don't worry; when the PalmPilot switches off, all your information is saved. You have a choice of having it switch off automatically after one, two, or three minutes. Tap on the little down triangle next to Auto-off After on the Preferences screen, and you get the choice, as shown in the following figure.

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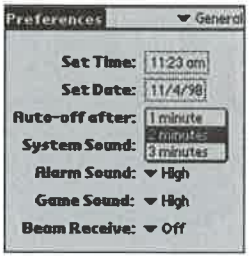

As easy as one, two, three: customizing the auto-off feature.

Which number you choose depends on the way you use your PalmPilot. If you often read documents that don't require that you tap the screen, or if you find yourself staring at the screen for a while, lost in thought (wake up, already! There's work to be done!), then set it for three minutes. If, on the other hand, you're the kind of person who takes out your PalmPilot, and with a tap, tap, tap gets your work done fast, set it to one minute.

Sound Off: Setting the System, Alarm, and Game Sounds

Use your PalmPilot enough, and it'll soon seem to you like a living thing—especially because it can make a variety of sounds, including a kind of cheeping or chirping, a little "click," and even a tiny melody when you do a HotSync. (See Chapter 5, "Keeping Your Life in Sync: HotSyncing Your PC and PalmPilot," for more information about HotSync.)

Your PalmPilot makes three kinds of sounds:

- **System sounds** These sounds are the clicks it makes when you tap with your stylus and the melody that plays when you do a HotSync.
- **Alarm sound** This sound is made when you've asked to be alerted when an event is about to occur such as an upcoming meeting.
- **Game sounds** These sounds play—yes, you guessed it—when you play games.

You can easily turn on or off these sounds. On the Palm III and higher, you also can set how loud these sounds are—low, medium, or high.

To turn on or off the system sounds in anything lower than a Palm III, check or uncheck the appropriate sound box on the Preferences screen. To set the sound level or turn it off on a Palm III, click on the little triangle next to the sound you want to change, and choose the level of the sound, or turn the sound off, as shown in the following figure.

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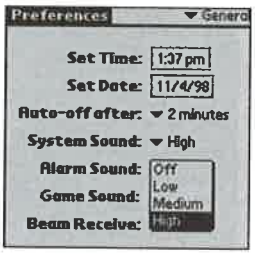
A sound decision: Changing the sounds that the Palm III makes.



You can set your PalmPilot to make all kinds of sounds, not just the ones it ships with.

Special programs called *hacks* can make your PalmPilot do all kinds of crazy things, including making many different sounds. The SystemSoundHack, available from `www.palmpilotsoftware.com`, is a good one for doing that. To use any hack, you also need HackMaster, which is available at `www.palmpilotsoftware.com`. Turn to Chapter 20, "Installing New Software on Your PalmPilot," for more information about how to install software such as HackMaster and SystemSoundHack.

It's Beaming Time: Setting the Palm to Receive Infrared Beams

You're sitting in a conference room, checking your schedule on your Palm III. All of a sudden, your Palm beeps at you and asks whether you would like to receive information. No, you're not about to receive a message from an extraterrestrial being. (At least, I *think* you're not.) Instead, someone nearby has pointed his or her Palm III at you and wants to send you some information. You've been beamed.

The Palm III and higher allows people to send each other information such as business cards, addresses and phone numbers, memos—even entire programs. When someone wants to send you information, his or her Palm beams your Palm (kind of like a fraternity or sorority handshake, minus the knuckles). You're then asked whether you want to receive the info. If you say yes, you get it from the infrared port.

If you don't ever want to receive this kind of information, you can block it out. To do so, you must turn your Beam Receive off. On the Preferences screen, tap on the triangle

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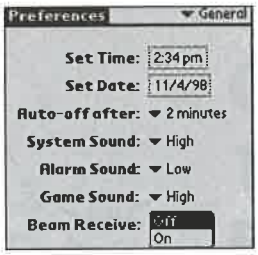
and choose **Off**, as you see in the following figure. For more information about beaming, turn to Chapter 19, "Beam Me Up, Scotty! Using the Palm III's Infrared Port."



Don't beam me up, Scotty: Turning off the Beam feature in the Palm III.

Time to Get Started

So you've made it through starting your PalmPilot for the first time. Now you're ready to start organizing your life. Start with the next chapter, "Organization 101: Touring the PalmPilot's Main Screen," to start getting your life under control.

Your PalmPilot also includes some software you can run on your computer's desktop. For information on installing and using it, turn to Chapter 6, "Oh, Yeah...You Have a Computer, Too. Using the Palm Desktop." And for understanding how to synchronize your data between your computer and your PalmPilot, turn to Chapter 5, "Keeping Your Life in Sync: HotSyncing Your PC and PalmPilot."

The Least You Need to Know

- Make sure that the batteries match up properly with the + and – in the battery compartment, and don't force the compartment closed.
- "Ultra" batteries designed for electronic equipment last longer than do normal batteries in the PalmPilot.
- Adjusting the contrast control regularly makes reading your PalmPilot screen much easier.
- Before you travel to another time zone, reset the time so that your alarms go off when they're supposed to.
- If you don't want to be bothered by owners of other Palm IIIs beaming you information, turn off the Beam Receive feature.

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Chapter 4

Organization 101: Touring the PalmPilot's Main Screen

In This Chapter

- Using the Application Launcher to run all the PalmPilot's programs
- Learning how the Date Book can keep you on schedule and on time
- Using Expense to keep track of your business and personal expenses
- Writing memos with the Memo Pad
- Keeping track of all your tasks with the To-Do List
- Using the PalmPilot's other main programs to get your life under control

Congratulations! You've started your PalmPilot for the first time, and you've set up your preferences so that it's no longer merely a digital companion and instead has become your digital slave. (If you've followed my advice, you can almost hear it say, "Yes, master. Your wish is my command.") Now you're ready to start organizing your life with it.

To do so, you need to start where it all begins: on the PalmPilot's main screen. Get used to this screen because you'll be looking at it a lot. Think of it as the command center for your life. On this screen, you go to get to all the features of the PalmPilot that help you set your calendar, to-dos, addresses and phone numbers, and more. So come along. We're going take a guided tour of the PalmPilot's main screen.

The First Stop on the Guided Tour

The first thing you need to do is check out the lay of the land and see what's on the main screen. Wherever you are in the PalmPilot, to get to its main screen, tap on the **Applications** silkscreened button. When you do that, you see the screen shown in the following figure.

The command center for your life: The main screen of the PalmPilot.

As you can see, everything you need to organize your life is in one place. Let me explain what's on the main screen and what it'll do for you:

- **Address Book** Keeps track of names, addresses, and contacts.
- **Calculator** Lets you do math calculations (no great surprise).
- **Date Book** Lets you keep track of all your meetings, appointments, and schedule (a calendar program).
- **Expense** Tracks your personal expenses or business expense reports, and is especially useful when you're traveling.
- **HotSync** Synchronizes all the information on your PalmPilot with information on your desktop computer.
- **Mail** Lets you read and create email. You cannot send email directly from the PalmPilot. You have to hook it up to your desktop computer with the HotSync cradle and get and receive messages through your normal email program.
- **Memo Pad** Allows you to write memos.
- **Preferences** Allows you to customize just about every aspect of the PalmPilot. You use Preferences to match the PalmPilot to how you live and work.
- **Security** Lets you lock out anyone else from using the PalmPilot, and allows you to keep whatever information you want private so that no one else can see it.
- **To-Do List** Lets you keep a list of tasks that you need to perform. This program is especially powerful because you can put your to-dos into categories and rank how important they are to you.

Stay tuned; later in the chapter, I cover what these programs do in more detail and how you can use them to organize your life. By the way, if you've installed any other

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programs onto your PalmPilot, such as from bonus packs or other places, they show up on the screen as well.

Prepare for Takeoff: Using the Application Launcher to Run Programs

To run any of these programs, you tap on their icons with your stylus. Then, if you want to switch to another program, you can press its button. So, for example, if you are adding an item to your To-Do List (bring home alfalfa treats for your pet rabbit), and receive a phone call alerting you to a meeting you need to attend (monthly meeting of the Rabbit Breeders Association), you just press on the **Date Book** button on the lower left of your PalmPilot's case. The Date Book pops up, and you can then schedule the date and time for that hare-raising meeting.

By the way, when you switch from one application to another, you don't need to save what you're doing. As soon as you put something in your PalmPilot, it's automatically saved; you don't need to do anything further.

If the program you want to run doesn't have a button—or if you prefer doing things differently, just for the heck of it—you can instead tap on the **Applications** button, which brings you back to the Application Launcher screen. Then you can tap on the program you want to run from there. Again, you don't need to save what you're doing.

If you've installed a lot of extra software into your PalmPilot (see Chapter 20, "Installing New Software on Your PalmPilot," for information on how to do so), all those cute little icons might take up more than one screen. If they do, you can scroll through them by using the scroll buttons or by tapping on the scrollbar on the right side of the screen to scroll through them.

You can easily jump straight to the application you want to run.

If you have more than a screen full of applications you want to run, scrolling down until you find the one you want to run can be a pain. A simpler solution is to write the first letter of the application in the Graffiti area of your PalmPilot. The Launcher then immediately jumps to the icon of the first application that begins with that letter.

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If you're not the visual type, you might like to see your applications in a list-kind of format, like that shown in the following figure. As you can see, the icons in this format aren't merely tiny, they're teeny-tiny. This view is especially good if you have several applications installed because then they all fit on one screen.

Lots of little icons: This list view of the Application Launcher is especially useful if you have a lot of programs installed.

You can easily get your programs in a list like this. From the Application Launcher screen, tap on the **Menu** button. From the **Options** menu, choose **Preferences**. Then tap on the triangle, and choose **List**, as you can see in the following figure.

You can get your applications to show up in the list view by choosing this option.

By the way, the PalmPilot offers a very powerful way for you to group applications that you often use in concert with another. You can group them by categories and then view only programs in that particular category, putting the rest temporarily out of view.

For example, say that when you travel, you mainly use the email program, Expense, Memo Pad, and Date Book, but you rarely use any other applications. When you travel, working would be much easier if you didn't have to scroll and search through other applications to find the ones you use the most. By categorizing these four applications into a Travel group, you can show only those that you need when you're traveling. And if, for example, when you do your expense reports, you use only Expense, Calculator, and Date Book, you can group them into an Expense group. To learn how to group applications this way, turn to Chapter 9, "Using PalmPilot Categories to Organize Your Life," and Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work."

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Tracking Names and Addresses with the Address Book

I used to own a Rolodex. It was so fat, and had names crossed out and scribbled back in so many times, and was filled with so many sticky notes and misalphabetized business cards that I stopped using it. I cringed every time I looked at the ugly, unwieldy, unusable thing.

Then the PalmPilot came along, and I was an immediate convert. Its Address Book is everything a Rolodex should be: You can track every piece of information about someone, including not just the basics such as name, address, and phone number, but also email address, pager number, and mobile phone number.

Better yet, it's easy to search; you don't have to search only by last name. If all you remember about someone is the name of the company he or she works for, type the company name in Find, and you get full contact information for that person.

What are custom fields in the Address Book?

On the Options menu of the Address Book is a confusing menu item: Rename Custom Fields. What in the world, you're probably wondering, is a *custom field*? The Address Book contains categories of information you can enter about each of your contacts—such as Last Name, First Name, Company, and so on. Each of these categories is called a *field*. If you want to enter a category of information that's not already listed, you can create a custom field for it; for example, you can create a custom field for Web page addresses so that you can have at hand the Web addresses of businesses and individuals.

To run the Address Book, tap on its icon, or press the button with the picture of a telephone on it. You then see the following screen.

Like a Rolodex, but much better: the PalmPilot's Address Book.

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For more information about using the Address Book to help you keep track of all your contacts, turn to Chapter 12, "Keeping Track of Contacts with the Address Book."

Some people find that they can more easily type in their contacts on their desktop computer and then use HotSync to get those contacts into their PalmPilot than they can enter those contacts right into the PalmPilot. Turn to Chapter 5, "Keeping Your Life in Sync: HotSyncing Your PC and PalmPilot," for more information on how to use HotSync.

A Calculating Mind: Using the Calculator

Quick, what's 86,432.4 times 9.9? Got you, didn't I? If you had a PalmPilot in hand right now, you would know the answer. (No, you don't need to do the numbers; the answer is 855,680.76.)

The PalmPilot works just like a normal calculator. The buttons are even large enough so that if you're so inclined, you can press them with your fingers instead of the stylus. (I don't suggest using your fingers after you've just eaten a sticky dessert, though. You'll gunk up your screen.) The Calculator's great for figuring tips, for example, and it's especially useful when you travel and need help with your expense report.

One great thing about the Calculator is that you can use it to paste the results of calculations into notes, memos, expense reports, and anything else you create on the PalmPilot—and again, you'll probably use it most when doing expense reports. To paste the results of a calculation into Expense, for example, you would proceed this way. After you've done the calculation, tap on the **Menu** button, and choose **Copy** from the **Edit** menu. You've now put the number into the PalmPilot's built-in Clipboard. Now switch over to Expense, and tap on the spot where you want to put the number. Next, tap on the **Menu** button, and choose **Paste** from the **Edit** menu. Voilá! Your number is in there.

You can correct number entry mistakes without having to start your calculations over.

Talk about frustrating. You've just typed in a string of calculations and realized that the last number you typed was wrong. Time to start over at the beginning...or is it? Not if you use the CE button on the Calculator. When you tap the **CE** button, it erases the last number you put in and puts the correct number you input into its place. For example, if you tap **56 + 817 × 978** but realize that you meant to type 988, you can tap the **CE** button and then **988**, and your calculation would be the one you want.

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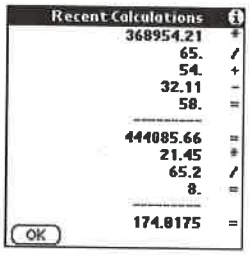
A little-known feature of the Calculator is that you can see a record of your most recent calculations. Tap on the **Menu** button, and choose **Recent Calculations** from the **Options** menu. You then see a list of your most recent calculations, as shown in the following figure.



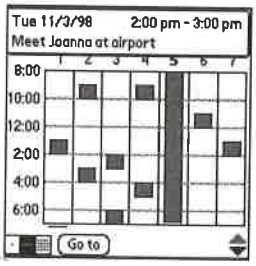
You can easily see a record of your most recent calculations in the Calculator.

Keeping Your Schedule with the Date Book

How can you be in two places at one time if you're not anywhere at all? If you've asked yourself that question or one like it, you need the Date Book. For the time-stressed and calendar-driven, it's a lifesaver.

You can schedule appointments easily. You also can easily schedule events or appointments that occur on a regular basis, such as a weekly staff meeting, a monthly luncheon, or a budget meeting that takes place on the third Thursday of every month.

Using the Date Book, you can look at your calendar either by the day, the week, or the month so that you can easily see schedules either up close or over the long haul. This way, you can easily spot conflicts as well. The following figure shows the weekly view.



You've got the whole week in your hands: the weekly view in the Date Book.

You also can create reminders about things that happen on a specific day of the year, such as your mother-in-law's birthday. (Maybe that's something that you would prefer *not* to remember, though.)

The Date Book lets you attach notes to events as well. So, for example, if you've thought of a great birthday present for your mother-in-law, such as five pounds of rutabagas, tap in a note next to her birthday, and then get set to go to the grocery store.

Best of all, you can set alarms to remind you when events are about to occur. That way, you should never again be late for the monthly meeting of Root Vegetable Lovers Anonymous (RVLA).

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For more information about how to keep your life on schedule using the Date Book, turn to Chapter 11, "Juggling Your Busy Schedule with the Date Book."

Tracking Expenses with Expense

Money, money, money. It may be the root of all evil, but for most people, to quote those famous philosophers, the Beatles, "That's what I want."

You might need to track your expenses to fill out your expense account at work, to prepare your own tax records because you run your own business, to track your family budget, or maybe for the heck of it because that's the kind of person you are.

Expense makes it easier to track your expenses for any reason at all. I've found it especially useful when traveling on business. Normally, when I travel, I shove all my receipts into my wallet, and two weeks after I return home, I dig through the wallet, pulling out bits and scraps of paper, trying to reconstruct my expenses for my expense account. This system never works. I'm always out money because I always forget to put down some expenses.

Thanks to the PalmPilot, I don't have that problem any longer. Whenever I spend anything, I immediately whip out my little digital helper and tap in the details about what I've spent. Then, when I return home, I sync my PalmPilot with my computer, send all my expenses into an Excel spreadsheet, and get my expense report, ready to be filed.

With Expense, you can track expenses every which way from Sunday, and then some. The following are some of the ways you can use this feature:

What if your company requires a specific format for filing expense reports?

Some companies require that expense reports be in a specific format, or even in a specific spreadsheet. Not to worry: You can customize the spreadsheet that your expenses get exported to when they get synced over to your computer. Turn to Chapter 14, "Time Is Money: Tracking Your Expenses with the PalmPilot," for details.

- You can track expenses by category, such as by a specific trip, kind of expense (such as meals), or any other category you can dream up.
- You can track expenses by companies you deal with and individuals at those companies.

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- You can track which payment method you use to pay each individual expense.
- You can see how much in expenses you've spent between certain dates.
- You can record expenses in the local currency of the country you're visiting. (Say hello to the Eiffel Tower for me.)
- You can sync all your expense information with an Excel spreadsheet on your computer and massage that information any way you want.
- Let me put it this way: You can pretty much track your expenses any way you want.

The following figure shows an example of a single expense being recorded.

I love New York: Tracking expenses paid for a big meal in the Big Apple.

Syncing Up Your Life with HotSync

The great odds are, you use a computer as well as a PalmPilot. When you're sitting at your computer, you would like to be able to add contacts, keep track of your to-dos, and schedule your time from your computer. When you're not at your computer, you probably want to do all that in your PalmPilot.

This scenario sounds like a recipe for disaster. (Just add salt, a pinch of pepper, and some marjoram. Stir well.) How will you get information back and forth, and make sure everything on both your computer and PalmPilot are up-to-date and in sync?

Enter HotSync. This clever, exceedingly useful feature of the PalmPilot does what it says: It synchronizes all the information between your PalmPilot and your computer. It shuttles all the information in your Date Book, Address Book, To-Do List, Memo Pad, and Expense back and forth between the two so that they're identical. It does so by using the cradle to exchange information between your PalmPilot and your Palm Desktop software on your computer (which I'll cover in Chapter 6, "Oh, Yeah...You Have a Computer, Too. Using the Palm Desktop.")

Syncing your PalmPilot like this has a very big extra benefit as well: It means that you can always have a copy of your information somewhere, in case disaster strikes. So, for example, if for some reason you have to do a hard reset on your PalmPilot (don't even *think* of that happening), and your entire life vanishes—all the contacts, memos, to-dos, appointments, and everything else—you don't need to worry because all the information is there on your Palm Desktop. Just do a HotSync after the hard reset, and you don't lose an iota of data.

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What's a conduit?

HotSync works by syncing data from each of the programs on your PalmPilot—Date Book, Address Book, and so on—with data from the same program on the Palm Desktop. You can customize how it syncs data from each of those programs so that it might sync data from your Address Book differently from how it syncs data from your Date Book. Each of these individual synchronizations is a piece of software called a *conduit*, so you have a Date Book conduit, an Address Book conduit, and so on. You can also buy separate conduits that sync your PalmPilot with personal information managers such as Outlook.

For more information on how to use HotSync, turn to Chapter 5, "Keeping Your Life in Sync: HotSyncing Your PC and PalmPilot."

Staying in Touch with Mail

Mail is one of the odder programs on the PalmPilot. On one hand, it does what it says: It lets you read email and create email messages. On the other hand, it does so in a truly peculiar way. You can't use the PalmPilot to connect to the Internet to send and receive email with Mail. Instead, you have to HotSync Mail with your computer's email program, and that email program sends and receives mail. The whole process is kind of like a relay race.

Despite that, Mail can be a very useful program. It's ideal to use when you're traveling, for example, and want to catch up on writing or reading email. Before you leave on your trip, sync Mail with your desktop computer to get all your latest email messages into your PalmPilot. Then, when you're on your plane or train or boat or rickshaw, read the messages on your PalmPilot and respond to them. When you get to your computer, sync everything back up, and your mail is sent using your normal email program.

One of Mail's better features is its capability to grab email addresses out of your Address Book. With a few taps of your stylus, you can get an address automatically. Mail also lets you group messages into categories that you create—for example, Personal and Sales and Follow-Up (in essence, any categories you want). It also includes many of the features you would expect in an email program, such as being able to send blind copies (no, they're not copies that need seeing-eye dogs; it means that the primary recipient doesn't know you're sending the message to other people). The following figure shows you some of the sending options you have with Mail.

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Mail gives you many of the features you would expect in a fully featured email program, such as all kinds of options covering sending messages.

For more information about using Mail, turn to Chapter 16, "How to Stay in Touch with Email."

You can get add-on programs that can send and receive email from your PalmPilot.

Although Mail can't directly send and receive email from your PalmPilot, several programs can, if you use your PalmPilot with a modem. You can buy a snap-on modem or a special cable to connect your PalmPilot to a normal external modem. Popular PalmPilot email programs include MultiMail and HandMail. You can try both for free at `www.palmpilotsoftware.com` before deciding whether to buy them.

Jotting Notes with the Memo Pad

I'm always getting ideas at odd times. When I wake from a dream at 4 a.m. When I'm about to start my car to drive to work. Right after a workout at the swim club. (Actually, I usually get my ideas at the swim club while I'm swimming, but because the PalmPilot doesn't yet come with a waterproof case, the pool is about the only place I can't bring it.)

My PalmPilot is always at hand, so when inspiration strikes (or when I think of a more mundane matter, like putting together a grocery list), I can whip out the Memo Pad and tap, tap, tap away to my heart's content.

The Memo Pad is great for jotting down ideas, thoughts, lists, and notes of all kinds. You can

You don't need to tap on New to create a new item in the Memo Pad, To-Do, and Date Book.

Instead, use this timesaving tip. Just start entering text by writing with your stylus on the Graffiti area. When you do that, a new item is automatically created, with the text in it that you've entered.

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easily categorize the notes so that finding any of them is easy; for example, you might have a category for budget memos, one for school-related memos, one for travel-related memos, and so on.

What makes the Memo Pad most useful is that you can easily paste memos into other places in your PalmPilot. For example, if you put together a memo about your next year's budget, you can paste the memo into a note that you attach to your budget meeting schedule in the Date Book. To paste a memo into another note or program, tap on the **Menu** button when you're in Memo Pad, and choose **Copy** from the **Edit** menu. Then switch to the place where you want to paste the memo, tap on the **Menu** button, and choose **Paste** from the **Edit** menu. That's it. You're done.

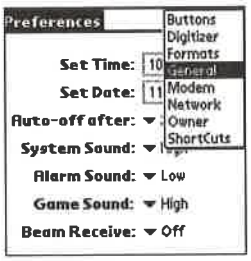
For more information about using the Memo Pad, turn to Chapter 10, "Write On! Taking Notes with the Memo Pad."

Customizing Your PalmPilot with Preferences

One of the reasons that you can organize your life with the PalmPilot is that it's so flexible; you can customize just about every aspect of the way it works. In Chapter 3, "Time for Takeoff: Starting Your PalmPilot for the First Time," you saw how to customize the basic functions of the PalmPilot. But you can customize just about anything you can imagine about the PalmPilot—everything from the way buttons work to which day the week starts. (Yes, it's true. You can have your week start on either a Sunday or a Monday. How's that for power?)

You do much of your customizing from the Preferences screen, shown in the following figure.

Bend your PalmPilot to your will from the Preferences screen.



For more information about how to customize your PalmPilot, turn to Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work."

Keeping Safe with Security

Your whole life is locked inside your little digital companion. The last thing you want is to have prying eyes peeping in there.

Security gives you two ways to keep your information private:

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- You can mark specific information as "private" so that no one except you—or someone you've given a password to—can read it.
- You can password-protect your PalmPilot so that only you—or someone you've given your password to—can run the PalmPilot.

You do both things by using Security, shown in the following figure. Tap on **Hide** to allow you to keep certain information private; then tap on the **Unassigned** box next to Password, and enter a password that will unlock those private records. Then, when you're creating a piece of information, you can mark it private, and only someone with access to your password can read those records.

Protecting your privacy with Security.

Keeping Track of Important Tasks with the To-Do List

How much do you have to get done in a given day? If you're like me and most people, just beginning to think about it all makes your head spin. Work, family, entertainment, recreation, grocery shopping...too much to do, too little time, and too few spare brain cells to keep track of it all. It's enough to make you want to retire to a monastery.

The PalmPilot's To-Do List may not be able to give you any extra brain cells, but I can vouch from personal experience that it certainly feels like it does. Use this feature, and no longer will your life make you feel as if you've been lifted up by a tornado and are being spun at high speed across the U.S. Plains. I can't vouch that it will make your life less complicated, but I can tell you that you'll at least be able to know all the things you have to get done—and maybe your head and entire body won't spin quite so fast.

So how can the To-Do List do all this for you? The following are some of the ways it can help:

- **You can set priorities for every one of your tasks.** That way, the most important ones show up at the top of your list and the least important ones at the bottom.
- **You can group them into categories, such as Personal, Budget, Travel, and so on.** This way, instead of having a huge, daunting To-Do List so big you'll never start on it, you can break it down into smaller, doable tasks in specific certain portions of your life.

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- **You can assign due dates for your tasks.** As anyone who's ever created a To-Do List knows, you can easily let all your to-dos slide so that they never get done. Assigning due dates reminds you when they need to be done—and prods you into action.
- **You can view your to-dos in many different ways, such as by due date, by category, and by their priority level.** Need to find out everything in your life that needs to get done on a specific day? No problem. How about seeing all the top priority items? It can be done. And you can easily view them all by categories as well.

The following figure shows an example of a To-Do List sorted by category—in this case, Personal.

Yes, picking up your daughter from her ballet class today is more important than taking your rabbit to the vet. How do you know? The To-Do List tells you.

The Least You Need to Know

- You can group programs into categories in the Application Launcher to make it easier to find the programs you want to run.
- You can set alarms in the Date Book to remind you when important events are about to occur.
- When you travel, you should write down your expenses as soon as you get them to make it easier to create expense reports with Expense.
- You can paste entire memos from the Memo Pad into any event or document on the PalmPilot.
- If you're worried about your personal privacy, you can password-protect your PalmPilot and also hide certain pieces of information stored on it.
- By grouping To-Do List items into categories, you'll find that keeping track of everything that needs to be done is easier.

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Chapter 7

Digital Magic: Taking Notes with Graffiti

In This Chapter

- Basic tips for learning how to write Graffiti
- Special characters drawn with Graffiti
- The Command stroke and ShortCuts for saving you time
- The built-in Graffiti cheat sheet
- Alternate strokes for best Graffiti recognition

One of the neatest, coolest, most useful—and at times most maddening—aspects of the PalmPilot is the way that it lets you write by hand with a stylus instead of using a keyboard. It's one of the main reasons that the device is so useful. You can carry it around in your pocket like a notepad, and when you need to jot down a To-Do item, schedule an appointment, or write a memo about your latest business brainstorm (selling stock in pick-your-own pumpkin franchises—Pik-A-Pumpkin; there's a killer idea), just whip out your PalmPilot and your trusty stylus and write away.

The good news is that writing by hand on your PalmPilot actually works. The bad news is that it might not always work in the way you expect. When you look at a To-Do item and read "ppinc honc cpocspies," you might not necessarily know that what you thought you were writing when you tapped in the note was "bring home groceries."

In this chapter, you learn how to use Graffiti, the handwriting-recognition software that comes with the PalmPilot. You learn tips and shortcuts so that not only will your

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notes be dead-on accurate, but you'll spend a whole lot less time writing and a whole lot more time able to concentrate on the work at hand. As I just wrote in my PalmPilot, "I dpomisc if!" ("I promise it!")

Understanding Graffiti Basics

Software like Graffiti that understands handwriting has been around for a while. But the one problem with this kind of software was that it rarely worked. For example, anyone who owned the Apple Newton, the ill-fated precursor to the PalmPilot (*precursor* because so many Newton owners cursed at the little device because it was so flaky) can tell many horror stories about how rarely the Newton accurately transcribed their keystrokes into letters, characters, and numbers.

Graffiti works pretty well, though, if you spend the time learning to use it, and if you follow a few tips. Keep these points in mind, and Graffiti should do a pretty good job recognizing what you write:

- **You need to learn the Graffiti alphabet.** With the PalmPilot, unlike the Newton and some other handwriting-recognition systems, you don't teach it to understand your own idiosyncratic handwriting. Instead, you have to learn Graffiti's idiosyncratic method of writing. It's not very hard, though. Spend a few hours, and you'll be a pro. Use the stickers and cards that 3COM provided when you bought the PalmPilot, check out the tear card on the inside cover of this book, and use the PalmPilot's own built-in cheat sheets.
- **When you write with Graffiti, you don't lift your hand.** Each letter and number is formed with a single, continuous stroke. If you lift the stylus, you write a different letter.
- **Graffiti boils down each character and number to its most basic form.** An *A*, for example, is formed by drawing two sides of a triangle, pointed up, with no bottom—in other words, like a regular *A* but without the cross stroke.
- **You have to pay attention to where you start each stroke.** That starting point has everything to do with whether Graffiti recognizes your letter properly. Draw a *U* with your stylus starting on the upper-left side, and Graffiti recognizes it. Draw that same *U* with your stylus starting on the upper-right side, and Graffiti assumes it's a *V*.

Using the Graffiti Writing Area

You do all your writing in the Graffiti writing area, shown in the following figure, which is the rectangular area at the bottom of the PalmPilot's screen. You write letters on the left side (logically enough, you see a little *abc* there) and numbers on the right side (yes, you guessed it, you see a little *123* there). If you look closely, you can see two tiny triangles at the top and bottom of the writing area. Those triangles mark the

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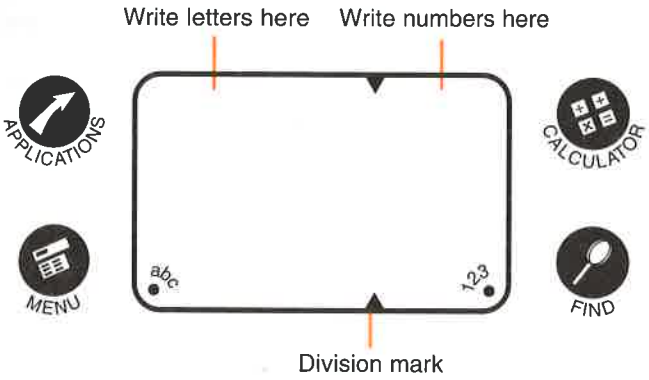
dividing line between where you can write letters and where you can write numbers. Most people write more letters than numbers, so the area for writing letters is larger. You can write with Graffiti only when the program you're running lets you enter text, such as the Memo Pad. So next time you're playing Chess or Space Invaders on your little friend, don't try writing "I give up!"



Let the writing begin: the PalmPilot's Graffiti writing area.

Two tiny dots appear in the writing area, one underneath the *abc* and one underneath the *123*. Tap on the dot beneath the *abc,* and a little keyboard pops up with letters on it, as you can see in the following figure. Tap on the dot beneath the *123,* and a keyboard pops up with numbers on it instead. You can tap on the letters and numbers and have them input into the PalmPilot. Use this keyboard only in a pinch. Writing for any length of time using this keyboard is almost impossible; it's kind of like trying to tap-dance in a two-foot square area. Sure, maybe it can be done, but why bother? You can pop up the keyboard only if you're running a program such as Memo Pad that accepts text input.

Use only the stylus or a similar device made for the PalmPilot to write in the Graffiti area.

The stylus has been specifically designed so that it doesn't scratch the surface of the writing area. If you use a sharp object or a pen, for example, it could scratch the Graffiti area, which would make it very hard for the PalmPilot to do a good job of character recognition.

Tap, tap, tap...You can input text by using the built-in keyboard.

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Learning How to Write Graffiti Letters and Numbers

The best way to begin writing in graffiti is simply to begin. Using either the sheets provided by 3COM or the alphabet on the inside covers of this book, follow the directions for writing each letter. Notice that each stroke has a thick dot. That dot is your starting point. To draw the letter *A*, you start at the lower left, as shown in the following figure.*

The alpha but not the omega: drawing the letter A in Graffiti. The large dot tells you where to start your stroke.

That's Very Nice, But How About Drawing Capital Letters?

To draw a capital letter, you have to use what amounts to a virtual Shift key. To draw a capital letter, put your stylus at the bottom of the screen, and draw an upward stroke. An arrow then appears at the bottom-right corner of the screen. It tells you that whatever letter you draw next will be capitalized.

Fine. But what if you want to write several capital letters in a row? Having to keep using that extra stroke between letters is kind of a pain. No problem. Instead of drawing a single upward stroke before writing a letter, draw two single upward strokes, one after another. *Two* arrows now appear. All the letters you draw next will be capital letters JUST LIKE THIS. (This stroke acts like a Caps Lock key.)

OKAY, BUT HOW DO I SHUT OFF THE CAPITAL LETTERS? JUST DRAW A SINGLE UPWARD STROKE. The two arrows disappear, and the capital letters are turned off.

Learn the Graffiti alphabet by playing Giraffe.

One of the programs that comes with your PalmPilot is called Giraffe. It's a game that teaches you the Graffiti alphabet; think of it as Space Invaders meets the "Alphabet Song." It's fun, it's fast, and it's a quick way to learn Graffiti. It doesn't come installed on your PalmPilot; you have to install it from the accompanying CD. Playing this game is worth the effort.

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Don't Curse at the Cursor

Just like when you use word processing software on a computer, you see a little blinking line at the point where you're entering text. That's the PalmPilot's cursor. Sometimes you might want to move the cursor forward or backward—to make a space between letters, for example, or to backspace.

Moving the cursor is easy. To move the cursor forward one space, just draw a line, from left to right, in the Graffiti area. To move the cursor back a space, draw a line from right to left in the Graffiti area. Both of these strokes are shown here.

From here to there and there to here, you can make the cursor move anywhere. The forward space (left) and the backspace (right) in Graffiti.

You can also easily move the cursor down to the next line of text—for example, if you're writing in the Memo Pad—and want to start writing on a new line of text. This stroke works like the Return key on a computer (and for those of a certain age, like the Return key on a typewriter). The following is the return stroke in Graffiti.

The return stroke in Graffiti.

Entering Special Characters with the Extended Shift

Sometimes you need to enter special characters into your PalmPilot (and no, I'm not talking about Groucho Marx), such as the copyright symbol (©) or the trademark symbol (™). You do so by using the Extended Shift stroke, as shown here.

To enter special characters such as the copyright symbol (©), you use this Extended Shift stroke.

After you draw the Extended Shift stroke, you use another stroke, such as an *M* stroke, which gives the trademark symbol. For a list of these strokes, turn to the tear card in this book.

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Using the Command Stroke to Master Your PalmPilot

Heel, PalmPilot, heel! If you want to take total control over your PalmPilot, use the Command stroke, as shown here.

Use the Command stroke, and make your PalmPilot jump through hoops.

Using this stroke, in fact, is a quick way of using the PalmPilot's menu commands. For example, to delete a record, you can tap on the **Menu** button and then choose **Delete** from that menu. Alternatively, you can do it much faster by using the Command stroke and then writing **D**. The menu commands change according to what PalmPilot program you're currently using. For more information about menus, turn to Chapter 8, "Taking Control of the PalmPilot's Applications, Menus, and Records."

To delete several letters, numbers, or words, highlight them, and then use the backspace or Space stroke to delete them.

Highlight the characters on the touch screen by drawing a line directly through them with your stylus. Then move your stylus to the Graffiti area, and draw a Space stroke or Backspace stroke.

Using Punctuation

Periods, question marks, commas, and otherpunctuation marks are good things. Without them, writing anything that makes much sense would be impossible. You can easily use punctuation with Graffiti. Just tap once in the Graffiti area, and then enter a punctuation character. For example, for a period, tap once, and then tap again. When you tap once, a dot appears in the lower-right corner of the PalmPilot's display. For a list of punctuation, turn to the tear card.

Taking ShortCuts with Your PalmPilot

One of the most useful of all Graffiti strokes is the ShortCut stroke, shown in the following figure. ShortCuts are abbreviations that are expanded into longer words or phrases through PalmPilot magic. You enter a ShortCut by first using the ShortCut stroke and then writing in the letters of the ShortCut. On my PalmPilot, for example, I have a ShortCut that automatically expands the letters *cig* into *The Complete Idiot's Guide*.

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Use this shortcut stroke, and save yourself a whole lot of time.

A number of ShortCuts are already built into your PalmPilot, such as *me* for the word *meeting*. Check out this list of built-in shortcuts:

- **br** Expands to *breakfast*
- **lu** Expands to *lunch*
- **di** Expands to *dinner* (Hmmm, does someone have a food fixation here?)
- **me** Expands to *meeting*
- **ds** Automatically puts in today's date
- **ts** Automatically puts in the current time
- **dts** Automatically puts in the current date and time

You can create new shortcuts yourself easily. To add your own, go to Preferences from the Applications screen. Then choose **ShortCuts** from the upper-right corner of the screen, and follow the directions. Turn to Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work," for more information about creating and using ShortCuts.

Getting Help by Using the Built-In Graffiti Cheat Sheet

If you're still having trouble writing Graffiti, don't despair. We've all been there. You can use the built-in Graffiti cheat sheet, shown here, to give guidance on how to write Graffiti.

Help is on the way: You can use this built-in Graffiti cheat sheet.

You can call up the Graffiti cheat sheet in several ways. Because of the peculiarities of the PalmPilot, not all of them work in all applications.

- Tap on the **Menu** button, and then choose **Graffiti Help** from the **Edit** menu.
- Enter the Command stroke, and write the letter **G**.

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Writing large makes it easier for Graffiti to recognize your letters.

When you write small in the Graffiti area, more errors occur. Larger is better and more accurate.

➤ Starting from near the bottom of the Graffiti writing area, draw a slash up the entire PalmPilot, all the way up to the screen area. (This approach works only in Palm OS 2.0 or higher.)

Different Strokes: Shortcuts to Better Graffiti Writing

Some characters (such as *A* are easier to write than other letters (such as *Y*). You can use different strokes than 3COM recommends and get better character recognition. See the list in Table 7.1.

Table 7.1 Different Strokes for Better Graffiti Recognition

Character	Graffiti Stroke	How to Draw It
B		Draw a *3* on the letter side of the Graffiti writing area.
E		Draw a *W* turned on its side.
G		Draw a *6* on the letter side of the Graffiti writing area.
J		Draw a backward *L*. Start from the top, go down, and then left.
K		Make it look kind of like a fish. Make the loop big.
N		Round the corners, like a sine symbol, instead of making them sharp.
P		Start at the bottom. You can make the top loop small.
Q		Pay attention to making a very long tail. It's okay if you don't close the *O* shape.
R		You can start at the bottom, as with the *P*. You can make the top loop small.
S		Draw a *5* on the letter side of the Graffiti writing area.
V		Draw a *U*, but start from the right.
X		Draw a fish swimming in the opposite direction as a *K*.

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Character	Graffiti Stroke	How to Draw It
Y		Draw a downward-facing loop, starting on the upper left.
2		Draw a *Z* on the number side of the Graffiti writing area.
4		Draw a *C* on the number side of the Graffiti writing area.
5		Draw an *S* on the number side of the Graffiti writing area.
7		Draw a backward *C* on the number side of the Graffiti writing area.
9		Draw an *h* on the number side of the Graffiti writing area.

The Least You Need to Know

- When you're writing Graffiti characters, don't lift your stylus from the writing area.
- You can call up a tiny keyboard by tapping the dots beneath the *abc* or *123* in the Graffiti area.
- Playing the built-in game Giraffe can help you learn Graffiti faster.
- Use ShortCuts to write frequently used words and phrases with only a few strokes.
- Use the built-in Graffiti cheat sheet to get help with writing characters and numbers.

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Chapter 8

Taking Control of the PalmPilot's Applications, Menus, and Records

In This Chapter

- How to run PalmPilot applications
- How to use the PalmPilot application controls
- How to attach notes to records
- How to make records private
- How to use menus

Before you can get your life organized with the PalmPilot, you need to first take control of the PalmPilot itself. In this chapter, you find out how to master the heart of the PalmPilot's software: the applications, menus, and records. Hey, don't turn the page. Believe me, you need to know these basics before you can get your life under control with your little digital companion. In this chapter, you find out the inside scoop on these important features:

- How to attach notes to records so that you can not merely schedule appointments and to-dos, but also include important information, such as details about who you're meeting, and more details about your to-dos
- How to use the menus to edit, cut, and paste, and rearrange the way your PalmPilot looks
- How to use built-in tips so that you're never at a loss for what to do when you need help

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Up and Running: Starting a PalmPilot Application

Just a reminder: You can start a PalmPilot application in two different ways. One is to press one of the four "hard" buttons at the bottom of the PalmPilot screen, if you want to launch the Date Book, Address Book, To-Do List, or Memo Pad. If your PalmPilot isn't turned on, this action turns it on; if it's already on, this action switches to the application whose button you pushed. The other way to start an application is to tap on its icon in the PalmPilot's main screen.

Want to launch any program from a "hard" button? It's easy.

You can have any of the "hard" buttons at the bottom of the PalmPilot launch any program you want, not just the ones they're preprogrammed to run. To remap the buttons to launch different programs, tap on **Preferences** from the main screen, and then choose **Buttons**. You then can remap the buttons. Turn to Chapter 21, "Customizing Your PalmPilot for the Way You Live and Work," for more information on customizing the buttons.

What you probably don't know (don't feel bad, not many people know this) is that those "hard" buttons at the bottom of the screen serve another purpose as well. They cycle you through the different categories and views for each application. For example, press on the **Date Book** button once, and it shows you the Day view. Now press again, and you see the Week view. Press one more time, and you're shown the Month view. With the To-Do List, the Address Book, and the Memo Pad, you start the application when you press once. Then each time you press the hard button again, you cycle through the different categories of data in that application, such as Business, Personal, and so on.

Taking Control of the Application Controls

Spend any time in a PalmPilot application, and you'll notice a variety of little buttons, scroll arrows, and tiny little widgets of all sorts. In the following list, you can see what they look like and learn what they do:

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A check in a check box means that the option is active; no check means the option is inactive. Tap on a check box to put a check in it. If a check already appears there, tap on it to remove the check.

To see a previous page of information, tap on the up arrow; to see the next page of information, tap on the down arrow. Simple, yes?

Off

Tap on the pick list, and you see a list of choices you can make. Tap on the choice you want, and you've chosen it.

Done

These babies are all over the place. Tap on this type of button to perform an action, such as create a new item, or to give an OK, Cancel, or Done command in a dialog box.

Use this bar to easily scroll through a document. Drag it and you can move it one line—or more—at a time. Tap on the arrow at the top of the bar, and you move up one line at a time; hold your stylus on the arrow, and you continue to scroll. Tap on the arrow at the bottom of the bar, and you move down one line at a time; hold your stylus on the arrow, and you continue to scroll. Tap on the bar itself to move several lines at a time.

10:00 pm

This type of box tells you that you can tap inside the box and take an action of some sort, such as setting the time.

Attaching Notes to Records and Making Records Private

A record is any event or item in your PalmPilot—for example, a memo, a To-Do item, an appointment, or an address entry. You can attach a note to any record on your PalmPilot, except you can't attach a note to a memo. This makes sense because a memo is really just a note, and you don't need to attach a note to a note.

This ability to attach notes may seem simple, but it's one of the most useful features of the PalmPilot. Let me tell you some of the ways you can use it:

- When you're scheduling an appointment in the Date Book, you can attach a note with the person's contact information and with other information relevant to the appointment.
- In your To-Do List, you can add a good deal of detail about each specific to-do, instead of having just a simple list. You also can use notes to group many To-Do items into a single entry. For example, under the single to-do "Pick up groceries," you could attach a note with your entire grocery list.
- In your Address Book, you can add personal information to the usual name, address, and phone number information about someone—for example, his or her birthday or names of his or her children or favorite food.

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How to Attach Notes to Records

Attaching a note to any record is quite easy. First, go to the entry where you want to enter a note. At the bottom of the entry, tap on the **Details** button, which you can see in the following figure. Tap on the **Note** button, type your note, and tap **Done**. Your note is then put in your list. Whenever an item has a note attached, a little Note icon appears next to it, as you can see in the figure.

*To add a note, tap on **Details** and follow the instructions. When you're done, a little Note icon appears next to the entry.*

How to Make a Record Private

Sometimes you might want to mark certain records private, which means that they disappear until you type in a secret password. Why would you want to hide records? Well, let's say you're going to a job interview on your lunch hour. You want to have information about that interview in your PalmPilot, but you don't want your boss to accidentally see it. And if you want to remember to buy a specific gift for your spouse on your anniversary, you want to keep that a secret as well. And, of course, you just might be flat-out paranoid. Whatever the reason, you can hide information from other people.

Marking a record private is easy. First, go to the record you want to keep private. Tap on the **Details** button, and then tap on the **Private** check box. Doing so marks the record as private. In the Address Book, after you go to the record, you have to tap on the **Edit** button and then the **Details** button before you can mark the record as private.

The process seems simple, but in fact, it might not work yet. Sometimes when you mark a record as private, it still appears. Why is that? Because you also need to tell your PalmPilot to hide all private records. Unless you take this extra step, your private records don't become private; they are still public. I guess that makes them public private records, which is about as confusing as things get.

To tell your PalmPilot to hide all private records, go to the Security program by tapping on the **Applications** button and then tapping on **Security**. You then see the following figure. Tap on **Hide**, and your records are all hidden.

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Can I have my privacy, please? This Security screen lets you make sure that your private records stay private.

If you want to be super-secure, also add a password using this screen. That way, the only way to show your private records is if someone first types the password here.

Pick One from Column A: Using Menus

If you want to cut and paste, change your font, create new entries, set preferences, or do a whole lot of other neat stuff, you need to use menus. The PalmPilot menus look and work a lot like the ones you're familiar with from the PC and the Mac. They drop down from the top of the screen, and you choose an option by tapping on it.

So far, so good. But one thing is kind of confusing about the PalmPilot menus. They change according to the program you're running. Therefore, the menus for the To-Do List are different from the ones for the Address Book. And making things even more confusing, the menus can change even in the same program, depending on what you're doing. For example, the menus you use in the To-Do List are different from the menus you use when you're writing an attached note in the To-Do List. The following figure shows a menu pulled down.

A typical menu on the PalmPilot.

To open a menu in any program, tap on the **Menu** button. A menu then appears at the top of the screen. Generally, you'll find these three kinds of menus:

- **The Record menu** Using this menu, for example, you can create and delete records, attach and delete a note to a record, or beam a record to another Palm III or higher.
- **The Edit menu** You use the Edit menu for cutting, copying, and pasting text; undoing editing commands; and calling up the keyboard so that you can enter text without using Graffiti.

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➤ **The Option menu** You use this menu when you want to change the font or change the way you display information, such as by company name rather than last name in the Address Book.

Use the Command stroke to enter menu commands quickly.

If you want to save time, use the Graffiti Command stroke instead of menus. The Command stroke lets you perform menu commands without having to tap, tap, tap. To use the Command stroke, draw an upward slash, starting at the lower-left area of Graffiti and ending near the upper-right area. Then write a single letter, such as **D**, which deletes a record, or **X**, which cuts a selection of text. The menu shows you the letters to use with Command strokes to perform each menu function. For more information on using Graffiti, turn back to Chapter 7, "Digital Magic: Taking Notes with Graffiti."

Changing Your Font with Menus

The PalmPilot screen is small and often hard to read, especially under many different kinds of lighting. For that reason, I find myself changing fonts often. On the Palm III, you can use three different fonts: small, medium, and large. I use the small font for most things, for example, but often use the medium font in memos and notes because I find it hard to read much text in the small font. To change a font, choose **Font** from the **Options** menu, or use the Command stroke followed by the letter **F**. You then see the following screen. Just choose the font size you want, tap on **OK**, and you've done the job.

Pick a peck of fonts. Choose small, medium, or large.

Cutting, Copying, and Pasting Text

The other menu feature I use all the time is for cutting and pasting text. It works a lot like Windows or the Macintosh. To cut or copy text, highlight it by drawing your stylus through it. When the text is highlighted, choose **Cut** from the **Edit** menu to delete it and put it into the PalmPilot's built-in Clipboard. (The Clipboard works just like a computer's Clipboard: Whatever you put in there can be pasted somewhere

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else, although you can have only one thing in there at a time. When you put in a new clip, the old one vanishes.) To paste the text somewhere else, tap with your stylus on the place where you want it pasted, and choose **Paste** from the **Edit** menu. The text then is pasted in. If you want to copy text but not delete it, choose **Copy** instead of **Cut** from the **Edit** menu.

Pssst! Using the PalmPilot's Built-In Tips

No matter how much of a pro you become at mastering your life with your PalmPilot, you're still going to need tips at some point. Let me share the good news: Tips are built right into the PalmPilot. You just have to know where to look.

When you tap on the **Details** button on any record, you get a screen that lets you enter information about that record. At the top of the screen is a little *i* button (which stands for "information"), as you can see in the figure on the left. Tap on it, and you get tips about working with that particular record, as you can see in the figure on the right.

Tap on the little i in this screen, and you get a tip about how to use the record.

The Least You Need to Know

- If you keep pressing a "hard" button for a particular application, it cycles you through the different categories and views for that application.
- You can remap the "hard" buttons so that they can launch any program you want, not just the ones they were originally programmed to do.
- You can attach notes to records so that you can get more information about your appointments, contacts, and to-dos.
- You can mark records as private so that only you can read them. You also can password-protect them so that only someone who knows the password can view them.
- You can use the Graffiti Command stroke as a shortcut to using Menu commands.

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Chapter 19

Beam Me Up, Scotty! Using the Palm III's Infrared Port

In This Chapter

- How infrared beaming works
- What kind of information you can beam to other Palms
- How to beam and receive information using the Palm
- Smart tips and strategies when using beaming to make your life more productive

One of the more amazing features of the Palm III is its capability to send and receive information to other Palm IIIs via its beaming port. You can send and receive items such as memos and to-dos, entire categories of information, programs, and even business cards. Beaming is great when you need to share information with others about projects, plans, and contacts.

When you beam information to someone, you're copying it to that person's Palm via the beaming port. The information that you beam over stays on your Palm; only a copy of it is sent.

What's an Infrared Beam, Anyway?

The Palm III does its bit of magic using an *infrared (IR) beam,* which is a beam of light that's invisible to the human eye because its rays are in the part of the electromagnetic spectrum that's beyond the limits of what we can see. (Whew! How's that for complicated, high-tech talk?) Data travels along the beam from the beaming port on the top of one Palm III to the beaming port on the top of the other. The Palms'

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beaming ports have to be pointed at one another, and nothing can be in between them to break the beam. (The beam can't go through walls like Superman's x-ray vision, for example.) They should be anywhere from about 2 inches to about 40 inches apart for best performance. (For those of you who think metric, think between 5 centimeters and 1 meter.)

What does IrDA stand for?

You may have seen the acronym *IrDA* used when referring to infrared technology on computers and printers. IrDA stands for the *Infrared Data Association*, a group of hardware makers that developed a standard for sending data via infrared light. Many computers—especially laptops—come with IrDA ports, and increasingly, printers come with them as well. Computers and printers equipped with IrDA ports can communicate with one another—for example, a computer can print without using a printer cable; it prints using an infrared beam. The infrared port on the Palm III isn't an IrDA port, so the Palm III can't communicate with IrDA-equipped hardware. The WorkPad, however, can communicate with the IrDA-equipped ThinkPad laptop computer.

Some computers have infrared ports called IrDA ports. The infrared beam of your PalmPilot can't communicate with them, however, because different technology is used for each.

Your TV remote control and other kinds of remote controls, such as remote controls for CD players, also use infrared beams. Don't try pointing your Palm III at them, however, because it unfortunately doesn't work.

Amazingly enough, though, you can buy special software and hardware that let you turn your Palm III's infrared beam into a universal remote-control device. With this software and hardware, you can control your TV, your CD player, and other items in your home that can be controlled by an infrared remote control. You can find several of these devices and software, including one called the Wedge and another called OmniRemote.

You also can buy a program called PalmPrint from Stevens Creek Software that allows you to use your beaming port to print with IrDA-equipped printers.

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What Kind of Stuff Can You Beam?

You can beam almost anything on your Palm III to another Palm III. Here's the low-down on what you can send and receive:

- **Any single entry in the Address Book, Date Book, To-Do List, or Memo Pad** You therefore can beam (or receive) appointments, to-dos, memos, and contact information to another Palm III.
- **Entire categories in the Address Book, Date Book, To-Do List, or Memo Pad** If you have a category of contacts called Prospects you want to send (or receive), for example, you can do so by using the infrared beam. You can beam any category in any of these applications.
- **Entire programs that you've installed on your Palm III** Let's say you've installed a neat game or other kind of program, and you want someone else to try it. No problem. Beam it over. Before you beam or receive a program, though, make sure that you're not violating the program's copyright by doing so. Check the program's documentation; when you weed through the lawyer-ese, you should find a statement telling you whether this kind of thing is kosher.

Non-Palm III models can be upgraded to beam as well.

If you don't have a Palm III and are jealous of your friends who beam with abandon, don't despair; there's hope for you. You can buy a 2MB upgrade card (that also has beaming capabilities) from 3COM for about $130 and can plug it into your existing PalmPilot. Then you can start beaming with the best of them.

- **Your own personal "business card"** You can put contact information such as your name, phone number, and email address (and even your favorite color, if you like) into the Address Book and then designate that entry as your business card. You can then send that business card to someone else with a Palm III, and you can receive business cards from others as well.

Be aware that your infrared beam doesn't let you transfer absolutely anything you want from Palm III to Palm III. You can't beam over any information from the Mail or Expense programs. You also can't beam the built-in programs that come with your PalmPilot, such as the Date Book and Memo Pad. You can beam information from those programs, as I explained before, but not the programs themselves.

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So Let's Get Beaming Already: How to Beam Stuff to Others

Beaming information from Palm III to Palm III sounds awfully sci-fi and high-tech. The truth is, though, it's very easy to do. You can beam individual items, entire categories, whole programs, and business cards.

The first thing you need to do before beaming is make sure that a Palm III is nearby, ready to receive. After you've found a willing victim—I mean someone who wants to receive your information—point your beaming port at that person's beaming port, and make sure you're from within about 2 to 40 inches from each other. Then you're ready to go.

In the following sections, you learn how to beam each different kind of item to another Palm III.

How to Beam an Individual Item to Another Palm III

After you've pointed your Palm IIIs at each other, select the individual item you want to beam to another Palm III, such as a memo in the Memo Pad. Then tap on the **Menu** button. When you see a screen like the one in the following figure, choose **Beam**. (Instead of using the Menu button, you can use the Command stroke shortcut **/B**.)

On your mark, get set, beam...Here, you can choose to beam an individual item to another Palm III.

After you choose this option, you see a very brief message telling you that the item is being prepared for beaming. Another brief message tells you that your Palm III is searching for another Palm to transfer information to. When it transfers the information, a screen tells you that you're sending the information. Congratulations! You've just beamed your first piece of information to someone else. The whole process shouldn't take longer than a few seconds.

How to Beam an Entire Category to Another Palm III

Beaming an entire category of information to another Palm III is just as easy as beaming a single piece of information. To beam an entire category to another Palm III, just

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switch to the category you want to beam by tapping on the **Category** triangle in the upper-right corner of your screen. Then tap on the **Menu** button. When you see a screen like the one shown in the following figure, choose **Beam Category**. (There's no Command stroke shortcut for beaming an entire category, by the way.) The same things happen as happened when you beamed an individual item. The only difference is that transferring the category might take a bit longer because a category is made up of many items, not just a single one.

You can just as easily beam an entire category as you can beam an individual item.

How to Beam a Program to Another Palm III

Beaming an entire application to another Palm III is quite easy. First, tap on the **Applications** button. The Applications screen then appears, showing you all the programs on your PalmPilot. Now tap on the **Menu** button, and choose **Beam**, or use the Command stroke shortcut **/B**. When you choose this command, you see the following screen. Notice that some of the programs have a little picture of a lock next to them; the lock means that they can't be beamed.

When you see a lock next to a program name on this screen, it means that program can't be beamed.

Tap on the name of the program you want to beam. Then tap on the **Beam** button. Your Palm III then goes through the now-familiar beaming routine. Beaming an entire application usually takes even longer than sending a category because most applications are larger than categories. However, even the largest program shouldn't take more than several minutes to beam.

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You can't beam just any application from one Palm III to another.

I mentioned before that you can't beam the Palm's built-in applications from one device to another. Neither can you beam some other programs. You cannot beam some add-on software to another Palm III. You cannot do so because the software company worries that if you had this capability, everyone would be beaming the software to each other, and very few people would bother to buy it. You can tell which software can't be beamed by looking for the little lock icon.

Beaming Your Business Card to Another Palm III

Beaming your business card to another Palm III is a breeze. It's a two-step process. First, you designate an entry in your Address Book as your business card. Then you beam away.

To designate an entry as your business card, either create a new one, or open an existing one. With it open, tap on the **Menu** button, and then choose **Select Business Card** from the **Record** menu. You then see the following screen.

On this screen, you can designate an entry as your business card.

Just tap on **Yes**. That's all it takes; you're ready to beam your card to someone else. When an entry is your business card, it gets extra-special treatment from your PalmPilot: A little icon that looks like a rolodex card appears at the top of the entry, as you can see in the following figure.

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To beam the business card, go to the Address Book. (You don't have to open your business card itself.) Then tap on the **Menu** button, and choose **Beam Business Card** from the **Record** menu. It is beamed then, just like any other item on your Palm III.

When you see the little icon that looks like a rolodex card at the top of an entry, it means that entry is your business card.

Receiving Information on Your Palm III via the Infrared Beam

Receiving information on your Palm III is a bit different than sending it. You get to say whether you would like to receive the information; therefore, a few different steps are required.

When someone tries to beam you something, you get a brief message saying "Preparing," which flashes by quickly. Then comes another brief message saying "Waiting for Sender," and another screen tells you it's receiving the data being sent. At this point, even though the data is being sent to you, note that it's not yet stored permanently on your Palm III. After all the information is sent, you get a message asking whether you want to accept what's being beamed to you. You are told specifically what's being sent. If you don't want to accept it, tap **No**. (Your motto must be "Beware of geeks bearing gifts.") To accept it, tap **Yes**. (Your motto clearly is "Don't look a gift horse in the mouth.")

If you choose to accept the item, you get a note telling you it's being accepted. Then the item (or category, or whatever is being beamed) opens. You can edit it at that point if you want, or you can simply store it. That's all there is to this process.

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When you're sent a category of items, you receive the items, but they are uncategorized.

One of the oddest things about receiving information via infrared beam is how the Palm III handles receiving entire categories. When you receive a category, every single item in that category is sent to you. Oddly enough, though, each item in that category is listed as Unfiled; in other words, the items aren't linked to a specific category. So, for example, if someone sends you the To-Do List category of Football, which has 13 To-Do items in it, you get all the To-Do items, but they aren't listed under Football. The Football category doesn't show up anywhere on your Palm III. The items are all Unfiled. You have to create the Football category yourself and then manually categorize them if you want them to be associated with the Football category.

How Beaming Can Make Your Life More Productive

Want to make your life more organized and more productive? Follow these tips and strategies for how to beam, and you can make it so:

- **Create several Address Book entries that you can use as your business card.** Like many people, you probably wear many hats in your life (no silly ones, I hope). You may have a job and also a small home-based business. You may spend time volunteering for a good cause. And even in your job, you may perform a variety of different functions. Having customized business cards for everything you do would be nice. Creating the cards is easy with the Palm III. Just create separate entries for each business card. Then, when you want to use a particular one for beaming, designate that one as your current business card.
- **Stop the madness: Turn off beaming.** Beaming is a very neat thing to do. It can be annoying as well. You don't want to always be bombarded with beams that interrupt your work and thoughts. You can easily turn off beaming so that you don't receive beams and so that you aren't even notified when someone tries beaming something to you. To do so, tap on the **Applications** button and then on **Prefs**. From the triangle in the upper-right portion of your screen, choose **General**. Then tap on the triangle next to **Beam Receive** and choose **Off**, as shown in the following figure. To turn it back on again, get back to this screen and choose **On**.

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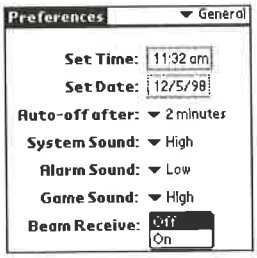

On this screen, you can turn off beaming.

➤ **Create To-Do categories that you can beam to others who work for you as a way of assigning tasks and coordinating projects.** Let's say you're working on a complex project, and as part of it, you need to assign tasks to one or more people. For each person on the project, create a To-Do category. Then, after you have a meeting with members of the team and want to more make sure they have the full list of what you need them to do, beam their categories to them. They then have an accurate list of what needs to be done.

The Least You Need to Know

- To beam or receive information using the infrared beam, your Palm III must be within from 2 to 40 inches of the other Palm III, with nothing blocking the beam.
- You can't beam or receive information using your Palm III and a computer's IrDA infrared port.
- You can beam individual items, entire categories, and whole applications, but you can't beam anything from the Mail or Expense programs.
- To make it easier to give people your contact information, create a business card and then beam it to them.
- If you don't want to be bothered by people beaming information to you, you can turn off the beaming option.

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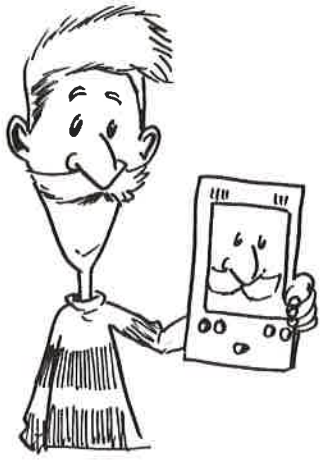


Chapter 21

Customizing Your PalmPilot for the Way You Live and Work

In This Chapter

- Remapping your PalmPilot's buttons
- Using and customizing the full-screen pen stroke
- Creating ShortCuts to make entering text easier
- Using several PalmPilots to work with a single PC

You can't paint hot-rod flames on your PalmPilot, tattoo it, put your monogram on it, or brand it with your ranch brand. (Too bad—I would kind of like to see a Ponderosa flaming brand on its side.)

You *can* customize it, however, in a whole lot of other ways. You can master your PalmPilot instead of having it master you. You'll find that customizing your PalmPilot for the way you live and work is easy. In this chapter, you find out how to change the way its buttons work, how to create ShortCuts to put in text for you automatically, and much more as well.

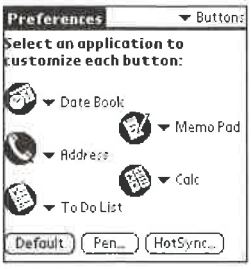
Cute as a Button: Remapping Your PalmPilot's Buttons

Don't like the programs that the buttons across the bottom of the PalmPilot run? No problem. You can make them run anything you want. Maybe you use the Calculator all the time, but never the Memo Pad. Or you always use a particular email program, but you never use the To-Do List. What a pain. Why should you be stuck with what some engineer has decided your PalmPilot buttons should do?

You're not stuck. You can easily change what programs the four PalmPilot hard buttons do when you push them. You can also change what the Calc button does when you tap it. In fact, you can even change what happens when you press the HotSync button on the PalmPilot cradle or modem. Let me tell you how.

First, tap on the **Applications** button, and then choose **Prefs**. Tap on the triangle in the upper-right corner of your screen, and choose **Buttons**. When you do so, you see the following screen.

Make your buttons run any program you want by using the Buttons Preferences screen.



The five buttons listed on this screen are the Date Book, Memo Pad, Address Book, To-Do List, and Calc. Now, you might have noticed that you have only four physical buttons on your PalmPilot, but five buttons are listed here. The odd button out is Calculator, which doesn't have a physical button; instead, it's silkscreened on the PalmPilot glass. Don't worry; you can still remap any of them, including the silkscreened Calculator button. To remap one, decide for which button you want to run a different program than the one listed, and then tap on the triangle next to it.

After you tap on the triangle, you get a list of all the programs on your PalmPilot, as shown in the following figure. Choose the one you want to run when you tap on the chosen button. Now, whenever you tap that button, the program you chose, not the original program, runs.

Tap on the triangle next to the button you want to change, and from this list, choose the program you want that button to run.

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You can easily make all the buttons work the way they did when you bought your PalmPilot.

Let's say you've fiddled and diddled with all the buttons on your PalmPilot and changed them all, but you then decide that you liked them the way they were when you bought it. You don't have to manually change every button. Instead, tap on **Default** on the Buttons Preferences screen, and all the buttons work the same way they did the moment your PalmPilot came out of the box.

When Is HotSync Not a HotSync? When You Remap Its Button

Amazingly enough, you can also change what happens when you press the HotSync button on your PalmPilot cradle or modem. I must admit that I'm not exactly sure *why* you would want to change it, other than the fact that you *can* do it. (Why climb Mt. Everest? Because it's there. Of course, remapping your HotSync button is much easier than climbing a mountain.)

To remap your HotSync button, get to the Buttons Preferences screen as outlined previously. Then tap on the **HotSync** button. You then can remap both the HotSync button on your cradle and on your PalmPilot modem, in the same way you remap your other buttons, as outlined in the preceding section.

Use the Power of the Pen: Customizing the Full-Screen Pen Stroke

Let me share a secret you might not know about your PalmPilot: You can use a special pen stroke to do some pretty neat things. Doing the stroke is easy; it's not like you need to know how to dance the bugaloo or anything. To use the stroke, place the pen somewhere around the middle of the Graffiti writing area, and then draw it quickly straight along the face of the screen toward the top of the PalmPilot, as shown in the following figure. That's all there is to it.

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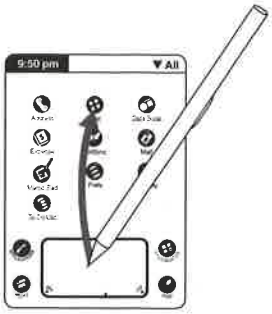
This special pen stroke brings up the Graffiti Help screen.



When you use this keystroke, it normally brings up the keyboard, which lets you tap to enter text into your PalmPilot. Ah, but let's say that you don't want this pen stroke to bring up the Help screen? Can you do anything about it? You certainly can. You can customize the stroke to do any of the following:

- **Turn on and off the backlight** Normally, to turn on the backlight, you have to press the PalmPilot's power button for two seconds. To turn it back off, you hold the button down for two seconds again. Instead, you can use this stroke. If the backlight's turned off and you use this stroke, it turns on the backlight. If the backlight's turned on and you use this stroke, it turns off the backlight. By the way, I use the stroke like this.
- **Call up the keyboard** This stroke normally opens the keyboard. You can tap away on the keyboard instead of using Graffiti strokes.
- **Get Graffiti Help** Having trouble remembering the Graffiti keystroke for a letter or number? You can pop up a Graffiti Help screen that shows you how to write each letter and number.
- **Turn off and lock** You're a secrecy freak. You worry about your phone being tapped. You use all kinds of encryption when you use the Internet. And you want to keep people and their prying eyes away from your PalmPilot. If so, then this feature's for you. It turns off your PalmPilot and then locks it so that only someone who knows the password can turn it back on again. Before you can use this feature, you have to turn on the password feature. For information on how to do that, turn to Chapter 4, "Organization 101: Touring the PalmPilot's Main Screen."
- **Beam data** Want a quick way to beam data to another Palm III? Just redefine the keystroke to beam away. Then whatever item you've been looking at is beamed to a nearby Palm III.

As I mentioned before, by default, this keystroke brings up the keyboard. To have it instead do any of the tasks in the preceding list, get to the Buttons Preferences screen as you would normally. Then tap on **Pen** to open the following screen. Now just choose what you want the pen stroke to do by tapping on the triangle.

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Here, you can redefine the secret pen stroke.

Take the Express Lane: Using PalmPilot ShortCuts

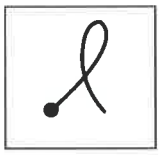
ShortCuts can be a maximum of 45 characters and spaces.

You are limited on how many characters you can expand a ShortCut into: 45 characters and spaces. Anything longer than that, and you're out of luck.

Writing with Graffiti is no fun. It's slow. It's tedious. It's easy to make mistakes.

Using ShortCuts is a great way to make entering commonly used text and phrases into your PalmPilot faster. With them, you'll never make a mistake. They let you enter a short abbreviation and then have the PalmPilot do some PalmPilot magic and expand that abbreviation into a longer phrase. For example, let's say that you often write the phrase "These are the times that try men's souls." (If you do use that phrase a lot, by the way, then I think it's time for a vacation. Or a new job. Or maybe a new life.) Instead of entering that phrase each time, you can instead write the ShortCut **tti**, for example, and the PalmPilot writes out the longer phrase for you.

To use a ShortCut, you first write the Graffiti ShortCut character, shown in the following figure, and then write the ShortCut text. (Think of the ShortCut character as a lowercase cursive *L*; that should help you remember how to write it.) When you do, the PalmPilot takes over and automatically writes the text that you want.



You write the ShortCuts character like this.

The PalmPilot comes with a number of ShortCuts already built in. Table 21.1 shows what they are and what they do.

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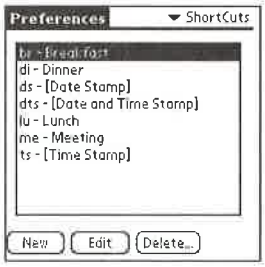
Table 21.1 PalmPilot Built-In ShortCuts

ShortCut	Turns Into
br	Breakfast
di	Dinner
ds	Today's date
dts	The current date and time
lu	Lunch
me	Meeting
ts	The current time

Creating ShortCuts of Your Own

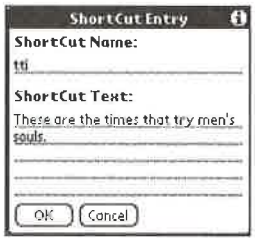
No doubt, you'll want ShortCuts for more things than breakfast, lunch, dinner, and some date and time stamps. You can easily create your own by tapping on the **Applications** button and then choosing **Prefs**. From the screen that appears, choose **ShortCuts**. You then see the following screen.

On this screen, you can get to be master of the ShortCuts universe.



To create a new ShortCut, tap on **New**. When you see the following screen, put in the name of the ShortCut at the top of the screen; in other words, enter the abbreviation that you want to write. At the bottom of the screen, write in the ShortCut text; in other words, enter what you want the ShortCut to expand to.

You create a ShortCut by entering text here.



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When you're done, tap on **OK**. Now, whenever you enter the ShortCut character and the abbreviation you just entered, the abbreviation is automatically expanded into the full ShortCut text.

Editing Existing ShortCuts

Sometimes you might want to change a ShortCut after you've created it. You can easily edit a ShortCut that you've created. To do so, go to the ShortCut Preferences screen, tap on the ShortCut you want to edit, and then tap on **Edit**. At this point, you can edit the ShortCut. If you instead want to delete the ShortCut, tap on **Delete**.

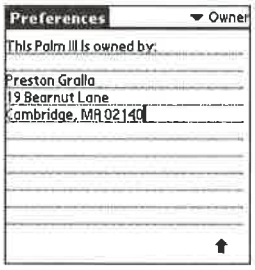
Make sure to put a space at the end of your ShortCut text.

If you don't put a space at the end of your ShortCut text, you often have to put the space in manually after the ShortCut is entered. So, when you're defining a new ShortCut, make sure to put that space at the end.

Put Your Stamp on Your PalmPilot: Putting in Your Name

Let me cast my vote for the most useless PalmPilot feature ever created: You can write in your name as the owner. I don't know why this feature is here. I guess the thinking is that if you lose your PalmPilot and someone finds it, that someone will be enough of a Palm devotee and will know to look for the screen that defines who owns the PalmPilot. And then, of course, this devotee will immediately track you down and send you the PalmPilot. The thought would never cross the person's mind that all he or she needs to do is change your name to his or hers, and he or she will have just gotten a free many-hundred dollar device.

Well, let's take a vote for honesty, and assume that someone may well find your PalmPilot and return it to you. Just in case, let me tell you how to put your name in. Tap on the **Applications** button and then on **Prefs**. From the resulting screen, choose **Owner**. Then write in your contact information, as shown here. By the way, if you find this PalmPilot, make sure to return it to me.



On this screen, you enter your name and contact information. If you find this PalmPilot on the street somewhere, please return it.

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Setting Up Your PC for Multiple Users

Little-known fact: Several people can use their PalmPilots on the same PC. Several different people therefore can HotSync their PalmPilot data with data stored on the PC. The PalmPilot and the Palm Desktop program are smart enough to keep everyone's information straight.

Here's how it works. When you first set up your PalmPilot to HotSync with your PC, you're asked for your username. From that point on, the PC always recognizes that username and does the proper HotSync. So, just make sure that everyone picks a different username for their PalmPilot.

HackMaster can help you customize your PalmPilot.

A widely available program called HackMaster can help you customize the PalmPilot in about a zillion different ways—everything from customizing its sounds, its alarms, how you use Graffiti, and much more as well. You don't actually use HackMaster to make any of these changes. Instead, you install HackMaster, which allows you to install other system *hacks* that customize your PalmPilot. Turn to Chapter 20, "Installing New Software on Your PalmPilot," for information on where to get HackMaster and system hacks.

The Least You Need to Know

- To remap your PalmPilot's buttons, you use the Buttons Preferences screen.
- You can remap the HotSync cradle button and modem button so that it runs any program you want, not just HotSync.
- You can customize the full-screen pen stroke for the PalmPilot feature you use most.
- ShortCuts can save you a great deal of time; you can use abbreviations that automatically input up to 45 characters and spaces.

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Appendix B

Glossary: Speak Like a Geek

Address Book The application in your PalmPilot that lets you keep track of names and addresses.

application buttons The four large buttons across the bottom of the PalmPilot that, when pushed, run the Date Book, Address Book, To-Do List, and Memo Pad.

archive A set of backups of items you've deleted from the PalmPilot that is kept on your desktop computer.

backlight A light in the PalmPilot Personal, PalmPilot Professional, Palm III, and Palm VII that lights the screen and makes it more legible.

battery cover A cover on the back of the PalmPilot that holds in the batteries.

beam To send information from one Palm III to another via the infrared port.

business card A record in the Address Book that you designate as your contact information and that you can beam to other Palm III owners from your Palm III.

Calc The PalmPilot's built-in calculator.

check box A box that you check by tapping on it; it lets you enable or disable an option.

Command stroke A Graffiti stroke that lets you quickly enter PalmPilot commands without having to use menus.

COM port A connection on a desktop computer that allows the computer to communicate with other devices. You plug the PalmPilot's cradle into the desktop computer's COM port. COM ports are commonly referred to as COM Port 1, COM Port 2, and so on.

conduit A software link that synchronizes data between your PalmPilot and your desktop computer for a specific application, such as the Date Book. Each PalmPilot application has its own conduit.

contrast wheel The wheel you turn to change the PalmPilot's screen contrast.

cradle The device that lets you HotSync your PalmPilot to your PC. You plug it into your desktop computer's serial port, and you place your PalmPilot into it.

Date Book The application in the PalmPilot that lets you keep track of your schedule.

Day view The view in the Date Book that shows you the day's appointments.

Doc file A reference file that you can read on your PalmPilot.

Doc reader A special program you use for reading Doc reference files.

Drop-down list A list that drops down when you tap on a triangle. You can choose an item from the list by tapping on it.

Easter Egg A small picture, animation, or other message hidden in the PalmPilot that can be called up only by a specific series of taps, strokes, and button pushes.

Expense The application in your PalmPilot that lets you track your expenses.

Extended Shift stroke A stroke used in Graffiti that lets you enter special characters, such as the copyright symbol.

Giraffe A game included on the PalmPilot CD that teaches you how to use Graffiti.

Graffiti The PalmPilot's handwriting-recognition system.

Graffiti area The area on the PalmPilot where you write with your stylus to input text.

HackMaster A program that lets you customize the PalmPilot's operating system and the way that it works.

hard buttons Another term for the application buttons. See also *application buttons.*

hard reset A reset in which you restart your PalmPilot, and all data and add-in programs are deleted.

HotSync To synchronize information between your PalmPilot and your desktop computer.

HotSync Manager The software you need to run to do a HotSync between your PalmPilot and your desktop computer.

IBM WorkPad A device sold by IBM that looks, works, and functions exactly like the PalmPilot.

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infrared port The port on top of the Palm III, covered by a piece of plastic, through which you can beam information to other Palm IIIs via infrared beams.

Internet Service Provider (ISP) A company that provides you with Internet access by letting you dial into it for a monthly fee.

IrDA A standard for sending data between computers and other hardware via infrared light. The PalmPilot's IR port doesn't work with the IrDA standard.

IR port See *infrared port*.

kilobyte A measurement of storage capacity on a computer such as the PalmPilot, typically abbreviated as K or KB.

MacPac A cable adapter and software that you need to plug your PalmPilot into a Macintosh.

Mail The application in your PalmPilot that lets you use your desktop computer's email program to send and receive email.

megabyte A measurement of storage capacity on a computer such as the PalmPilot, typically abbreviated as MB. A megabyte is made up of approximately 1,000 kilobytes. See also *kilobyte*.

Memo Pad The application in your PalmPilot that lets you write notes and memos.

memory cover A cover on the back of the PalmPilot that holds in the memory card.

Month view The view in the Date Book that shows you a month at a glance.

operating system The software built into a computer such as the PalmPilot that performs all its basic functions, including accepting input from the stylus and displaying information on the screen.

Palm Desktop The PalmPilot desktop software that runs on a Windows-based PC.

Palm OS The PalmPilot's operating system. See also *operating system*.

PalmPilot Personal The second-generation PalmPilot, which has 512KB of memory and backlighting.

PalmPilot Professional The second-generation PalmPilot, which has 1MB of memory, backlighting, and additional features such as Mail.

Palm III The third-generation PalmPilot, which has 2MB of memory and has features such as the capability to beam information to other Palm IIIs.

Palm VII The fourth-generation PalmPilot, which allows you to send and receive messages and get information from the Web via wireless communications.

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PDA Short for *personal digital assistant*, a term first coined for Apple computer's Newton, and sometimes used to refer to a device like the PalmPilot or Palm.

personal information manager Software such as Outlook and ACT on a desktop computer that lets you track names, addresses, appointments, and other similar information; in other words, it performs the same tasks the PalmPilot does.

pick list A list from which you pick an option by tapping on it.

Pilot Desktop for the Macintosh The PalmPilot desktop software that runs on a Macintosh.

Pilot 1000 The first-generation PalmPilot, with 128KB of memory.

Pilot 5000 The first-generation PalmPilot, with 512KB of memory.

PIM See *personal information manager.*

POP 3 server A computer used by an Internet Service Provider (ISP) that lets you receive email.

purge To delete archived items.

repeating events Events that occur on regular basis, such as on the first day of every month or on every Tuesday.

reset To restart the PalmPilot after it freezes.

reset button A tiny pinhole in the back of the PalmPilot that lets you reset the PalmPilot if it freezes.

scroll arrow An onscreen arrow that, when tapped, shows a new screen of information.

scrollbar An onscreen bar that lets you scroll through a screen by tapping on it or dragging it.

scroll buttons The plastic buttons in the middle of the front of the PalmPilot that let you scroll through screens.

semi-soft reset A reset in which you restart your PalmPilot, and any operating system patches or add-ins are deleted.

serial port The connection on the bottom of the PalmPilot that slips onto the cradle to allow the PalmPilot to communicate with a desktop computer. You can also connect the serial port to a modem. A *serial port* is also another term for a *COM port* on a desktop computer.

ShortCut A Graffiti stroke that lets you enter abbreviations that are automatically expanded into words or phrases.

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silkscreened buttons Buttons that have been silkscreened onto the bottom of the PalmPilot and that, when tapped, let you run programs or functions.

SMTP server A computer used by an Internet Service Provider (ISP) that lets you send email.

soft reset A reset in which you restart your PalmPilot but in which no data or programs are lost.

spreadsheet A piece of software that is like an electronic ledger that lets you perform many different kinds of calculations, especially having to do with budgets.

stylus The plastic-tipped pen included with the PalmPilot that you use to write in the Graffiti area and to tap on the screen.

TCP/IP The underlying technology that allows computers to communicate with each other on the Internet.

To-Do List The application in your PalmPilot that lets you keep track of your to-dos.

warm reset Same as *semi-soft reset.*

Week view The view in the Date Book that shows you the week's appointments.

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PRESTON GRALLA is a longtime journalist with Ziff-Davis Publications and an executive editor for the ZDNet Software Library. He also authored the popular *How the Internet Works, Fourth Edition* and *The Complete Idiot's Guide to Online Shopping.*

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