Guide to the Palm OS® Software 3.5 Upgrade

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About This Guide

This guide describes the enhancements provided by the Palm OS® Software 3.5 Upgrade.

Assumptions

This guide makes the following assumptions:

- You are familiar with your handheld and your Desktop application.
- You know how to perform HotSync® operations to synchronize your data, and you are familiar with the HotSync Manager located on your desktop.
- You have access to the documentation for your handheld. This guide does not provide a complete description of the features affected by the 3.5 Upgrade. Rather, it describes the enhancements and their benefits, notes the features that the enhancements affect, and if necessary, describes how the enhancement changes the way you work with your handheld or Desktop application.

About the illustrations in this guide

The 3.5 Upgrade can be installed on several different kinds of Palm OS handhelds, and some illustrations in this guide may show the interface or form of a handheld that differs from the interface or form of your handheld. The illustrations should still serve to make clear what the feature is, where the feature is located, and how to use it.

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About the Palm OS® Software 3.5 Upgrade

The Palm OS® Software 3.5 Upgrade is available for purchase from Palm, Inc. as a downloadable file or on CD-ROM. For more information on how to purchase the upgrade in your country, visit http://www.palm.com.

The 3.5 Upgrade can be installed only on Palm OS handhelds equipped with Palm OS software version 3.0 or higher. Please consult the web site or the information supplied with the CD-ROM for details about which handhelds can accept this upgrade.

This upgrade includes all the features that were updated in the Palm OS software version 3.3 Upgrade, so you do not have to install the 3.3 Upgrade if you have not already done so. To learn more about the features updated in the 3.3 Upgrade, read the documentation for the 3.3 Upgrade at http://www.palm.com/support/downloads.

The 3.5 Upgrade includes changes to the operating system of your handheld. Some of the enhancements are visible in the interface of your handheld, and these enhancements may require some changes in the way you work.

Installing the Palm OS Software 3.5 Upgrade

To install from a CD-ROM onto a Windows-based computer:

1. Insert the 3.5 Upgrade CD-ROM into the computer's CD-ROM drive.
2. When the Installer Menu appears, select the appropriate language.
3. Select your handheld.
4. Follow the onscreen instructions to complete the installation.

To install from a CD-ROM onto a Macintosh:

1. Insert the 3.5 Upgrade CD-ROM into the computer's CD-ROM drive.
2. Double-click the appropriate language folder.
3. Double-click the folder for your handheld.
4. Double-click the Installer application for your handheld.
5. Follow the onscreen instructions to complete the installation.

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To install from a downloaded file:

1. Go to http://www.palm.com, purchase and download the upgrade file, then close your web browser.
2. If you are using a Windows-based computer, double click the file to run the Installer application.
   If you are a using a Macintosh, use Aladdin Stuffit Expander to translate and expand the file. Double-click the Installer application and follow the onscreen instructions.

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What's New

The 3.5 Upgrade includes new features that are designed to help you work faster and more efficiently, and to provide easier access to important information. The features include:

- Displaying Agenda view to see appointments, untimed events and To Do items in one screen.
- Masking private records so a placeholder marks where they appear in the list.
- Duplicating Address Book entries for entering multiple records.
- Completing fields automatically.
- Updating future repeating events.
- Creating all day events.
- Delaying event reminders.
- Selecting text by tapping with the stylus.
- Categorizing beamed records.
- Command toolbar for providing quick access to commonly used menu commands.
- Tapping the title area to access the menu bar.
- Conserving battery power by reducing the auto-off delay time.

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New View: Agenda

Your Date Book lists all your appointments and untimed events and your To Do list stores all the things you need to do, and you typically switch between these applications to list all those items for any given day. With the new Agenda View, you can see all your current events and To Do items at the same time.

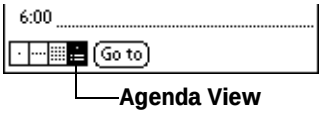
Working in Agenda View

Agenda View shows you your untimed events, appointments, and To Do items in one screen. When you tap an untimed event or appointment in Agenda View, Day View appears so you can see more detailed information about the event. You can tap the check box next to a To Do item to mark it as completed. When you tap a To Do item, your To Do list appears.

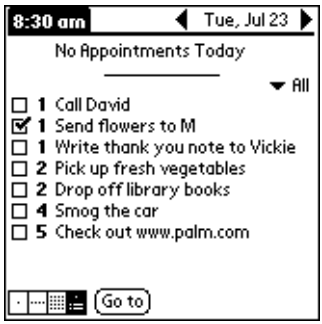
Note: The To Do items that appear and the way that you can change them depend on the settings in your To Do preferences.

To display Agenda View:

1. Tap the Agenda View button.



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



Note: You can also change the category of To Do items shown. Tap the pick list to select another category.

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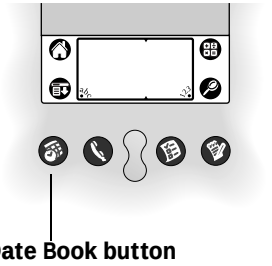
What changed?

Date Book Views

In previous versions of Date Book, you only had Day, Week, and Month views. Now you can use the application button or view icons to display the new Agenda View.

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

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



- Tap the appropriate view button in the lower-left corner of Date Book.

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New Ways to Work with Records

Many of the enhancements included in the 3.5 Upgrade improve your ability to work with records. We have incorporated new functionality and updated existing functionality to help you create, update, and manipulate your records.

Setting address record security

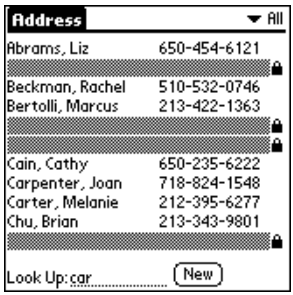
In Address Book, you have always been able to add security to selected records so they are completely visible, or totally hidden from view. Unfortunately, this means you can't tell where hidden records should appear in the list, and it is possible to forget that you created the records that are hidden from view.

What changed?

There is now a new security setting, called Mask Records, that enables you to hide the contents of a record so other people cannot view them, but continues to display a placeholder for the record.

Masked records appear as gray placeholders in the same position they would appear if they were not masked, and are marked with a lock icon.

As before, if you define a password for your handheld, you must enter it to display masked records.



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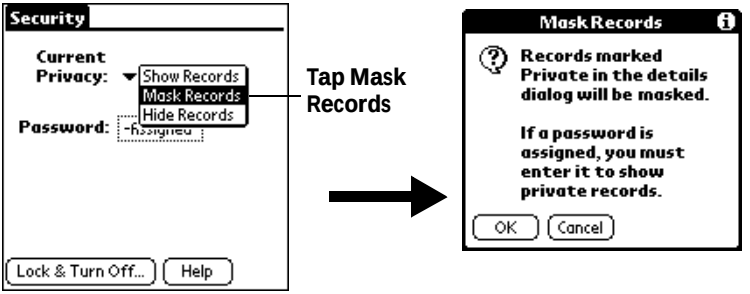
To mask all private records:

1. Tap the Applications icon .
2. Tap Security.
3. Tap the Current Privacy pick list and select Mask Records.



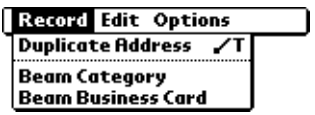
4. Tap OK to confirm that you want to mask private records.

Duplicating addresses

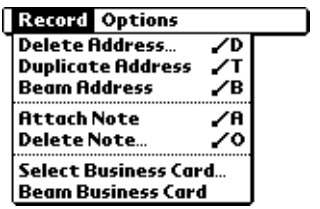
In Address Book, if you wanted to create records for two or more people working for the same company or living at the same address, you previously had to enter all the same information repeatedly to create each record.

What changed?

We added a new Duplicate Address menu item to the Record menu in Address Book, and created a new Command stroke, so you can easily copy records. When you tap the menu item or enter the command, a copy of the current record is displayed in Address Edit so you can make changes to the copied record. The word “Copy” appears in the First, Last, or Company field. The copy has the same category and attached notes as the original record. This makes it easier to enter multiple contacts at the same location.



Address list



Address view

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Automatically completing address fields

One feature of Expense that many users appreciate is the automatic fill feature. It lets you select an expense type by writing the first letter of an expense type in the Graffiti® writing area. For example, if you write the letter "T," it enters the "Taxi" expense type. Writing "T" and then "E" enters "Telephone" which is the first expense type beginning with the letters "TE."

What changed?

Now the same feature is available in Address Book. As you enter letters in the Title, Company, City, and State fields, text appears for the first logical match that exists in your Address Book. As you enter more letters, a closer match appears. For example, you may already have Sacramento and San Francisco in your Address Book. As you enter "S" Sacramento appears, and as you continue entering "a" and "n" San Francisco replaces Sacramento. As soon as the word you want appears, tap the next field to accept the word.

Note: The automatic fill feature works with data you entered directly on the handheld, not with data you input in the Desktop application.

Viewing address record details

It has always been easy to see your appointments and address record details at a glance, but there are some new features that have made them even easier to read.

What changed?

In the Address list screen, some fields have identifying letters to indicate what type of information is being displayed, and you can select which type of phone or other information appears in the Address list screen. Your options are Work, Home, Fax, Other, E-mail, Main, Pager, and Mobile. The identifying letters W, H, F, O, E, M, or P appear next to the record in the Address list, depending on which information is displayed.

If the field contains textual information, such as an e-mail address or web site URL, the identifying letter could be confusing. The new feature prevents this confusion, so if the E-mail or Other fields end in a letter, the identifying letters are not displayed.

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Updating events

In Date Book it has always been easy to create a repeating event. However, once you created a repeating event, you only had the choice of deleting the currently selected event or deleting all connected repeating events, you did not have the ability to change a repeating event.

What changed?

A new button (Future) was added to the Repeating Event dialog box, so you can now also modify or delete the current and future events within a group of repeating events without affecting past events.

Changing repeating or continuous events

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

To delete repeating events:

1. Select the record you want to delete.
2. Tap the Menu icon .
3. Tap Record, and then tap Delete Event.
4. Do one of the following:

Tap Current to delete only the current event item.

Tap Future to delete the current and all future event items and reset the end date of the repeating event to the last shown date.

Tap All to delete all occurrences of the repeating event.

5. Tap OK.

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Note: In Date Book, you can choose to delete the text of the current repeating event, current and future events, or all instances of that event.

When you purge repeating events in Date Book, a confirmation dialog box appears. Tap the pick list and select how you want to purge old records. Purge deletes repeating events if the last of the series ends before the date that you purge records.

Considerations for repeating or continuous events

If you change the date of an occurrence of a repeating event (e.g., from January 14 to January 15) and apply the change to all occurrences, the new date becomes the start date of the repeating event. Your handheld adjusts the end date to maintain the duration of the event. If you apply the change to current and future occurrences, past occurrences are not changed.

Creating all-day events

You can create records for meetings and appointments that last all day by manually setting the start time at the beginning of your day, and the end time at the close of your day.

What changed?

The 3.5 Upgrade includes a new button in the Set Time dialog, called All Day. When you tap this button, it automatically inserts the start and end time of the event as defined in your Date Book preferences.

Delaying event reminders

In Date Book, you can set an audible alarm to remind you of an important meeting or appointment. You can set it for minutes, hours or days before the event. The alarm sounds at the predetermined time and a dialog box appears to remind you of the event.

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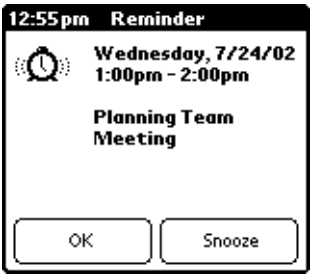
What changed?

The Reminder dialog now contains a new Snooze button. If you want to temporarily ignore the reminder, you can tap Snooze to dismiss the reminder and return to the current screen. The reminder message appears again five minutes after you tap Snooze.



Viewing event record details

It has always been easy to see your appointments and address record details at a glance, but there are some new features that make them even easier to read.

What changed?

When you create an event in Date Book, the start and end times for the event are indicated by a time bar on the left side of the screen. Previously, if the event had the same start and end time, the time appeared twice. With the current update, if an event has the same start and end time, the time is only displayed once.

Selecting text

In previous versions of the operating system you could select text by dragging the stylus across the letters, words, sentences, or paragraphs. You could also select all the text in a field by choosing Select All from the Edit menu.

What changed?

You can now select words and lines of text by tapping with your stylus.

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To select text in an application:

1. Tap the beginning of the text that you want to select.
2. Drag the stylus over the text to highlight it (in black), double tap to select a word, or triple tap to select a line of text.

   Note: You can also drag *across* the text to select additional words, or drag *down* to select a group of lines.

Beaming categories

Your handheld is equipped with an IR (infrared) port that you can use to beam information to another Palm OS® handheld that's close by and also has an IR port. You can beam all records of the category currently displayed in Address Book, To Do List, or Memo Pad between handhelds.

What changed?

In previous versions of the operating system, beamed records were placed in the Unfiled category, and you had to go to the appropriate application, find the beamed records, then assign a category to them.

The 3.5 Upgrade includes a new Beam dialog that appears when your handheld receives the beamed records, where you can immediately assign the records to a specific category. If the record was originally filed in a category you do not have, you must first create the new category.

To receive beamed information:

1. Turn on your handheld.
2. Point the IR port directly at the IR port of the transmitting handheld to open the Beam dialog box.
3. Select a category for the incoming information, create a new category, or leave the information unfiled.

4. Tap Yes.

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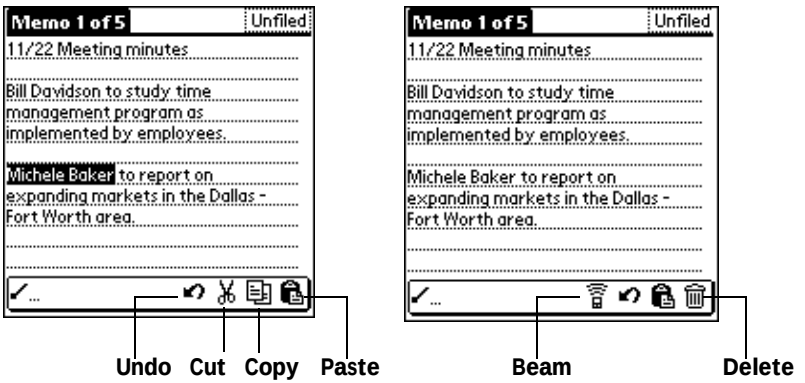
Changes to Menus and Commands

Menus and commands are easy to use, and we have added two new features to help you quickly access the menu bar and the more commonly used menu items.

Command toolbar

The 3.5 Upgrade includes a command toolbar that displays context-sensitive menu commands for the current screen. For example, if text is selected the menu icons displayed may be undo, cut, copy, and paste. Tap an icon to select the command, or immediately write the corresponding command letter for an appropriate command in the Graffiti writing area.



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

What changed?

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

Command	

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Accessing the menu bar

Before you can perform any of the tasks on the menu bar, you either have to display the menu bar or enter the Graffiti command.

What changed?

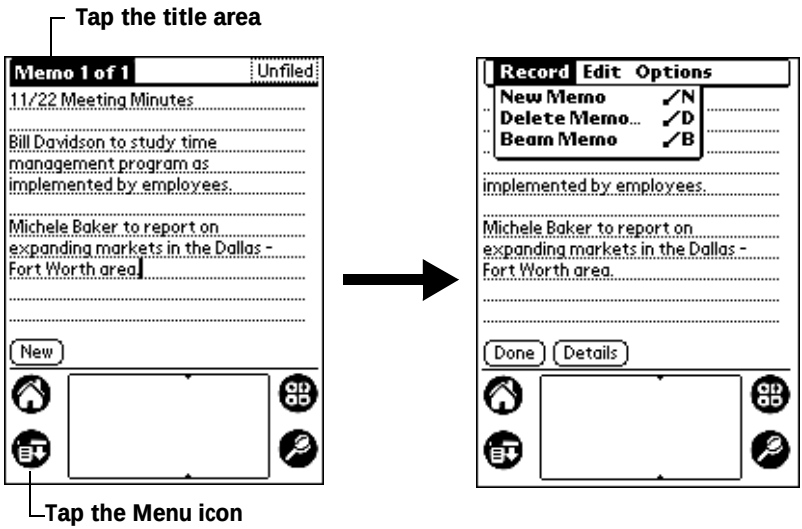
With the 3.5 Upgrade, you can also display the menu bar by tapping in the title area.

To open the menu bar:

1. Open an application (such as Memo Pad).
2. Do one of the following:

   Tap the Menu icon .

   Tap the inverted title area at the top of the screen.



Auto-off delay

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

What changed?

You can set your handheld to shutoff after 30 seconds in addition to the original choices of 1 minute, 2 minutes, and 3 minutes.

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Warranty and Other Product Information

Limited Warranty

This warranty applies to customers located in the United States, Australia, Canada (except Quebec), Ireland, New Zealand, U.K., and other English language countries, and countries for which a translation into the local language is not provided.

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Any Palm, Inc. platform application supplied by Palm, Inc. that makes correct use of Palm, Inc. platform date and time functions will not have a problem transitioning to the year 2000. The date and time utilities for the Palm, Inc. platform use 32 bits to store seconds, starting at January 1, 1904. This approach allows the correct representation of dates through February 5, 2040. The Date Book software currently displays dates through December 31, 2031. Provided the product is still being sold by Palm, Inc., Palm, Inc. will make software enhancements to remove these limitations well in advance of these dates.

If it appears that any Palm, Inc. product does not perform properly with regard to such date-data on and after January 1, 2000, and Customer notifies Palm, Inc. before the later of April 1, 2000, or ninety (90) days after original purchase of the product from Palm, Inc. or its authorized reseller, Palm, Inc. shall, at its option and expense, provide a software update which would effect the proper performance of the product, repair the product, deliver to Customer an equivalent product to replace the product, or, if none of the foregoing is feasible, refund to Customer the purchase price paid for the product.

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Customers using date and time utilities other than those supplied by Palm, Inc. should check with the developer to determine if the software will correctly handle all of the subtle issues of date and time conversion.

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