ShortCuts Preferences

The ShortCuts Preferences screen enables you to define abbreviations for entering text with Graffiti strokes. This section describes how to create, edit, and delete a ShortCut. See Chapter x for more information on the use of ShortCuts.

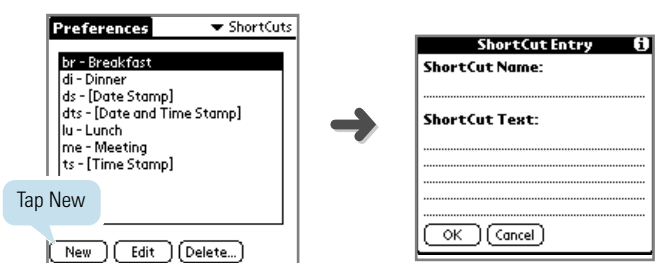
Creating a ShortCut

You can create a ShortCut for any words, letters, or numbers. All ShortCuts you create appear on the list in the ShortCut Preferences screen. All the ShortCuts are available in any of your Smartphone applications and are backed up on your computer when you perform a HotSync operation.

To create a ShortCut:

1. Tap New.

2. On the ShortCut name line, enter the letters you want to use to activate the ShortCut.



3. Tap the ShortCut Text area and enter the text that you want to appear when you write the ShortCut characters.

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

4. Tap OK.

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

ShortC	

Editing a ShortCut

After you create a ShortCut, you can modify it at any time.

To edit a ShortCut:

1. Tap the ShortCut you want to edit.

2. Tap Edit.

3. Make the changes you want and tap OK.

Deleting a ShortCut

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

To delete a ShortCut:

1. Tap the ShortCut you want to delete.

2. Tap Delete.

3. Tap Yes.

14

CHAPTER14

Installing and Removing Applications

Your Smartphone comes with many applications installed. You can also install additional applications, such as games and other software. There are many third-party applications available for your Smartphone. To learn more about these applications, go to the web site: http://www.palm.com.

Each of these applications takes up some of the Smartphone's memory. Periodically, you'll want to add new applications or remove old ones. This chapter explains how to install and remove applications on your Smartphone and how to remove Palm Desktop software from your computer.

Installing Applications

The Install Tool makes it quick and easy to install software on the Smartphone. You install new applications during the process of synchronizing your Smartphone and your computer.

Considerations:

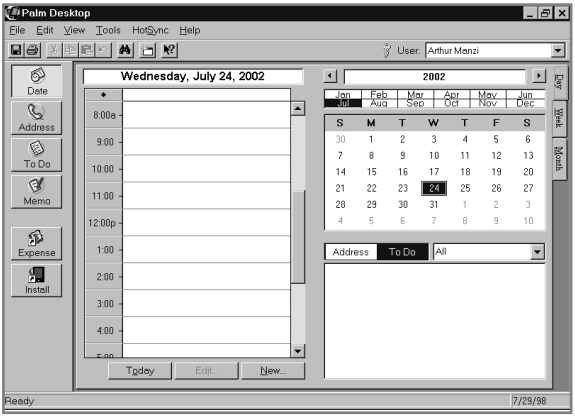
- Be aware that any application you install on the Smartphone resides in memory. A hard reset of the Smartphone automatically deletes these applications; you can also delete them manually.
- Install only applications from reliable sources. It is recommended that you use only Palm-certified or Platinum-certified applications.

To install software on your Smartphone:

1. Copy the application you want to install into the Add-on folder (inside the Palm Desktop folder) on your computer.

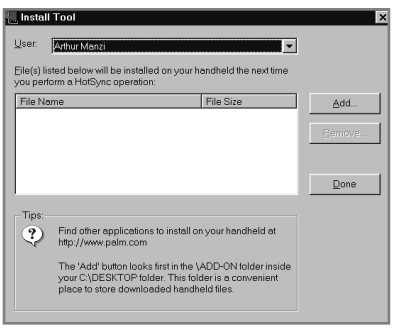
   If you prefer to copy the application into another folder, you must navigate to that folder before you complete step 5.

2. Double-click the Palm Desktop icon on your Windows desktop (or select Palm Desktop from the Start menu) to open the Palm Desktop software.



3. Click Install.

Note: You can also select the Install Tool dialog box by selecting Install Tool from the Palm Desktop program group or by double-clicking any file with a PRC file extension.



4. In the User drop-down list, select the user name that corresponds to your Smartphone; then click Add.

5. In the file list of the Add-on folder, select the application from that you want to install on your Smartphone; then click Open. The file appears in the Palm Install Tool dialog box.

   Note: **If you decide not to install an application, select it in the list of files in the Palm Install Tool dialog box and click Remove. The application is removed from the dialog box list, but not from your computer.**

6. Click Done. A message appears to indicate that the application or applications will be installed the next time you perform a HotSync operation.

7. Perform a HotSync operation to install the applications. See Chapter x, "Exchanging and Updating Data using HotSync Operations" for more information.

Removing Applications

You can remove add-on applications, patches, and extensions from your Smartphone if you run out of memory or no longer need them.

You cannot remove the built-in applications that reside in the ROM portion of your device, including the Date Book, Address Book, To Do List, Memo Pad, Expense, Calculator, and Mail applications.

To remove an add-on application:

1. Tap the icon to open the Applications Launcher.

2. Tap the Menu icon to open the Applications Launcher menus.

3. Tap App, then tap Delete.

4. In the Delete dialog box, tap the application you want to remove.

5. Tap Delete.

6. Tap Yes to confirm that you want to remove the application from your Smartphone.

7. Tap Done.

Removing Palm Desktop Software

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

To remove Palm Desktop software:

1. In Windows, from the Start menu, choose Settings, and then Control Panel.

2. Open the Add/Remove Programs icon.

3. On the Install/Uninstall tab, select Palm Desktop software; then click Add/Remove.

4. Click Yes to confirm you want to remove the application.

Note: You must retain the HotSync Manager from the installation CD to synchronize data with another PIM.

A

APPENDIX A

Maintaining Your Smartphone

This chapter provides information on the following:

- Proper care of your smartphone
- Prolonging battery life
- Resetting your smartphone

Caring for Your Smartphone

Your smartphone is designed to be rugged and reliable and to provide years of trouble-free service. Please observe the following general tips when using your smartphone:

- Take care not to scratch the screen of your smartphone. Keep the screen clean. When working with your smartphone, use the supplied stylus or plastic-tipped pens intended for use with a touch-sensitive screen. Never use an actual pen or pencil or other sharp object on the surface of the smartphone screen.

- Your smartphone is not waterproof and should not be exposed to rain or moisture. Under extreme conditions, water may enter the circuitry through the front panel buttons. In general, treat your smartphone as you would a pocket calculator or other small electronic instrument.

- The touch-sensitive screen of your smartphone contains a glass element. Take care not to drop your smartphone or subject it to any strong impact. Do not carry your smartphone in your back pocket: if you sit on it, the glass may break.

- Protect your smartphone from temperature extremes. Do not leave your smartphone on the dashboard of a car on a hot day, and keep it away from heaters and other heat sources.

- Do not store or use your smartphone in any location that is extremely dusty, damp, or wet.

- Use a soft, damp cloth to clean your smartphone. If the surface of the smartphone screen becomes soiled, clean it with a soft cloth moistened with a diluted window-cleaning solution.

Battery Considerations

Please note the following considerations for the battery in your smartphone:

- Under normal conditions, your smartphone battery should remain charged by placing it in the cradle for just a few minutes each day. You can conserve battery life by minimizing the use of the backlight feature, and changing the Auto-off setting that automatically turns the smartphone off after a period of inactivity. See “General preferences” in Chapter x.

- If the battery becomes low in the course of normal use, an alert appears on the smartphone screen describing the low battery condition. If this alert appears, perform a HotSync ® operation to back up your data; then recharge the unit. This helps prevent accidental data loss.

- If the battery drains to the point where your smartphone does not operate, it stores your data safely for about a week. In this case, there is enough residual energy in the battery to store the data, but not enough to turn on your smartphone. If your smartphone does not turn on when you press the power button, you should recharge the unit immediately.

- If your battery drains and you have the unit in an uncharged state for an extended period of time, you can lose all of the stored data.

- There are no serviceable parts inside your smartphone, so do not attempt to open the unit. You never need to replace the battery, even if the charge runs out.

- If you ever dispose of your smartphone, please dispose of it without damaging the environment. Either return your smartphone to the service representative, or take it to your nearest environmental recycling center.

Resetting Your Smartphone

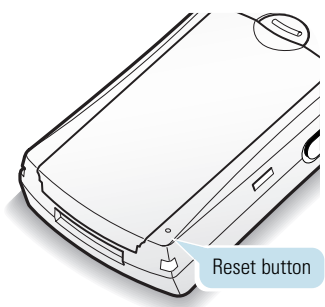
Under normal circumstances, you will not have to use the reset button. On rare occasions, however, your smartphone may no longer respond to buttons or the screen. In this case, you need to perform a reset to get your smartphone running again.

Performing a Soft Reset

A soft reset tells your smartphone to stop what it's doing and start over again. All records and entries stored in your smartphone are retained with a soft reset. After a soft reset, the Dialer screen appears.

To perform a soft reset::

- Use the reset tip tool, or the tip of an unfolded paper clip (or similar object without a sharp tip), to gently press the reset button inside the hole on the back panel of your smartphone.



Performing a Hard Reset

With a hard reset, all records and entries stored in your smartphone are erased. Never perform a hard reset unless a soft reset does not solve your problem.

Note: You can restore any data previously synchronized with your computer during the next HotSync operation.

To perform a hard reset:

1. Hold down the power button on the fright side of the smartphone.

2. While holding down the power button, use the tip of an unfolded paper clip (or similar object without a sharp tip) to gently press the reset button.

3. Release the power button.

4. When a message appears on the smartphone screen warning that you are about to erase all the data stored on your smartphone, do one of the following:

   Press the Up button on the front panel of the smartphone to complete the hard reset and display the Setup screen.

   Press any other button to cancel the procedure.

Note: With a hard reset, the current date and time are retained. Formats Preferences and other settings are restored to their factory default settings.

B

APPENDIX B

Frequently Asked Questions

If you encounter a problem with your smartphone, do not call Technical Support until you have reviewed the following list of frequently asked questions, and you have also reviewed the following:

- The README file and HelpNotes located in the folder where you installed the Palm™ Desktop software on your computer (or on your installation CD or diskettes)

- The Palm Desktop online Help

If you are still having problems, contact Technical Support. For US and International telephone numbers, see ??????.

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

Software Installation Problems

Problem	Solution
When I install Palm™ Desktop software I get an error that a modem is attached to my serial port, but there is no modem attached.	Take your smartphone out of the cradle and install again.

Operating Problems

Problem	Solution
My smartphone won't turn on.	Try each of these in turn: • Press the contrast control button and adjust the contrast. • Recharge the unit. If your smartphone still does not operate, try a soft reset. See "Resetting your smartphone" in Appendix A.
I get a warning message telling me my smartphone memory is full.	• Purge Date Book and To Do List. This deletes To Do List items and past Date Book events from the memory of your smartphone. See "Purging records" in Chapter x. You may need to perform a HotSync ® operation to recover the memory.

Problem	Solution
I get a warning message telling me my smartphone memory is full. (continued)	• Delete unused memos and records. If necessary, you can save these records. See “Deleting records” in Chapter x. • If you have installed additional applications on your smartphone, remove them to recover memory. See “Removing applications” in Chapter x.
My smartphone keeps turning itself off.	Your smartphone is designed to turn itself off after a period of inactivity. This period can be set at one, two, or three minutes. Check the Auto-off setting. See “General preferences” in Chapter x.
My smartphone is not making any sounds.	Check the System Sound setting. See “General preferences” in Chapter x.
My smartphone has frozen.	Perform a soft reset. See “Resetting your smartphone” in Appendix A.
I don’t see anything on my Smartphone's screen.	• Change the contrast settings. • Check the battery power. If necessary, recharge the unit.

Tapping and Writing Problems

Problem	Solution
When I tap the buttons or screen icons, my smartphone activates the wrong feature.	Calibrate the screen. See “Digitizer preferences” in Chapter x.
When I tap the Menu icon , nothing happens.	Not all applications or screens have menus. Try changing to a different application.
I can’t get my smartphone to recognize my handwriting.	• For your smartphone to recognize handwriting input with the stylus, you need to use the Graffiti ® writing. See “Using Graffiti writing to enter data” in Chapter x. • Make the Graffiti character strokes in the Graffiti writing area, not on the display part of the screen. • Write Graffiti strokes for letters in the left-hand side, and the strokes for numbers in the right-hand side of the Graffiti writing area. • Make sure that Graffiti is not shifted into extended or punctuation modes. See “Using Graffiti writing to enter data” in Chapter x.

Application Problems

Problem	Solution
Problem Solution I tapped the Today button, but it does not show the correct date.	Your smartphone is not set to the current date. Make sure the Set Date box in the General Preferences screen displays the current date. See "General preferences" in Chapter x for more information.
I know I entered some records, but they do not appear in the application.	• Check the Categories pick list (upper-right corner of the screen). Choose All to display all of the records for the application. • Check Security and make sure that the Private Records setting is set to Show private records.
I am having problems listing memos the way I want to see them.	• If you cannot manually arrange the order of the memos in the List screen, check the Memo Preferences setting. Make sure that Sort by is set to Manual. • If you choose to view your memos alphabetically on Palm Desktop software and then perform a HotSync operation, the memos on your smartphone still appear in the order defined in the Memo Preferences setting. In other words, the sort settings that you use with Palm Desktop software are not transferred to your smartphone.

B

Problem	Solution
I created an event in Date Book, but it doesn't appear in the Week View.	In the Week View, you cannot select overlapping events that have the same start time. If you have two or more events with the same start time, choose the Day View for the particular day to see the overlapping events.

HotSync Problems

Problem	Solution
I cannot do a HotSync operation; what should I check to make sure I am doing it correctly?	• Check the Windows tray to make sure the HotSync Manager is running. If it is not, open Palm Desktop software. • Click the HotSync Manager, choose Setup and click the Local tab. Check the Serial Port setting displays the correct COM port where your cradle is attached. • Make sure the cradle is connected securely.
I did a HotSync operation, but one of my applications did not synchronize.	Click the HotSync Manager and choose Custom. Check the correct conduit is active.

Problem	Solution
I am using Outlook as my PIM, but I cannot do a HotSync operation.	• Click the HotSync Manager and choose Custom. Check the correct conduit is active. • Check the correct conduit is installed. Reinstall the HotSync Manager and make sure the correct conduit is selected.
I cannot launch the HotSync Manager.	• Make sure you are not running another program, such as America Online, CompuServe, or WinFax, that uses the serial port you selected in the Setup dialog box. • Reinstall the Palm Desktop software.
I tried to do a local HotSync operation, but it did not complete successfully.	Try each of these in turn: • Make sure HotSync Manager is running. If HotSync Manager is running, exit and restart it. • Make sure you selected Local from the HotSync Manager menu or the Palm Desktop software menu. • Check the cable connection between the cradle and the serial port on your computer. • Make sure you selected the correct serial port on the Local tab in the Setup dialog. It should be set to the port where you connected the cradle. • Try a lower baud rate setting on the Local tab in the Setup dialog.

Problem	Solution
I tried to do a local HotSync operation, but it did not complete successfully. (continued)	• Make sure you are not running another program, such as America Online, CompuServe, or WinFax, that uses the serial port you selected in the Setup dialog box. • Read the HotSync Log for the user account for which you are performing a HotSync operation. • Make sure your smartphone is seated in the cradle correctly. • Make sure the gold-plated connectors on the cradle and your smartphone are clean. Use a pencil eraser to clean them.
I tried to do a modem HotSync operation, but it did not complete successfully.	Check the following on your computer: • Make sure your computer is turned on and that it does not shut down automatically as part of an energy-saving feature. • Make sure the modem connected to your computer is turned on and is connected to the outgoing phone line. • Make sure Modem is checked in the HotSync Manager menu. • Make sure the modem you are using with your smartphone has an on-off switch. Your smartphone cannot “wake up” a modem that has an auto-off feature.

Problem	Solution
I tried to do a modem HotSync operation, but it did not complete successfully. (continued)	• Make sure the modem is connected properly to a serial port on your computer and is connected to the incoming phone line. • Confirm that the Setup String in the Setup dialog box configures your modem correctly. You may need to select a different Modem Type or enter a custom Setup String. Most modems have a Setup String that causes them to send initial connection sounds to a speaker. You can use these sounds to check the modem connection. • Confirm that the Speed setting in the Setup dialog box is appropriate for your modem. • If you have problems using the As Fast As Possible option or a specific speed, try using a slower speed. • Make sure you selected Modem from the HotSync Manager menu. • Make sure you are not running another program, such as America Online, CompuServe, or WinFax, that uses the serial port you selected in the Setup dialog box. • Make sure your modem resets before you try again. (Turn off your modem, wait a minute, then turn it back on.)

Problem	Solution
I tried to do a modem HotSync operation, but it did not complete successfully. (continued)	Check the following on your smartphone: • Confirm that your modem is turned on. • Make sure the dialing instruction dials the correct phone number. • If you need to dial an outside line prefix, make sure you selected the Dial Prefix option on your smartphone and entered the correct code. • If the telephone line you are using has Call Waiting, make sure you selected the Disable call waiting option under Modem Sync Phone Setup on your smartphone and entered the correct code. • Make sure the telephone line you are using is not noisy, which can interrupt communications. • Make sure you are not running another program, such as America Online, CompuServe, or WinFax, that uses the serial port you selected in the Setup dialog box. • Make sure your modem resets before you try again. (Turn off your modem, wait a minute, then turn it back on.)

Network Problems

Problem	Solution
I cannot get e-mail on my smartphone.	• To receive e-mail wirelessly, you must have over-the-air digital data coverage in your area. Connect your service provider. • If you have digital data coverage, you can send and receive e-mail on the smartphone by using the application and keeping all of your mail messages on a server. The Mail application does not support over-the-air data. • If you do not have digital data coverage, you must send and receive e-mail on your computer e-mail program. You can then transfer messages to Palm Mail using a HotSync operation. Once the messages have been transferred, you can read them answer them, and compose new messages on the smartphone. These messages are transferred back to your computer during your next HotSync operation and sent to their recipients by the computer e-mail program. See "Chapter x Mail".

B

Problem	Solution
I cannot surf the Web on my smartphone.	• To access the Internet, you must have over-the-air digital data coverage in your area. Contact your wireless telephone service provider. • Before you can open a Web side on your smartphone, the Network Preferences must be set up. This is usually done by your service provider. See “Chapter x Setting Network Preferences.”

Beaming Problems

Problem	Solution
Recharging problems Problem Solution I cannot beam data to another Palm Computing ® connected device.	• Confirm that your smartphone and the other device are between ten centimeters (approximately 4") and one meter (approximately 39") apart, and that the path between the two devices is clear of obstacles. Beaming distance to other Palm Computing ® connected device may be different. • Move your device closer to the receiving device.

Problem	Solution
When someone beams data to my smartphone, I get a message telling me it is out of memory.	Your smartphone requires at least twice the amount of memory available as the data you are receiving. For example, if you are receiving a 30K application, you must have at least 60K free.

Recharging Problems

Problem	Solution
When I place my smartphone in the cradle, the cradle light does not go on.	• Confirm that your smartphone is well seated in the cradle. • Confirm that your recharger cable is properly connected to the back of the cradle's serial (COM) port connector that plugs into your computer. • Confirm that your recharger is plugged into an AC outlet and that the AC outlet has power.

B

Password Problems

Problem	Solution
I forgot the password, and my smartphone is not locked.	You can use Security to delete the password. If you do this, your smartphone deletes all entries marked as private. You can, however, perform a HotSync operation before you delete the password: the HotSync process backs up all entries, whether or not they are marked private. In this case, the following procedure restores your private entries and lets you access them: 1. Use the Palm Desktop software and the cradle to synchronize your data. 2. Tap Forgotten Password in Security to remove the password and delete all private records. 3. Perform a HotSync operation to synchronize your data and restore the private records by transferring them from your computer to your smartphone.
I forgot the password and my smartphone is locked.	If you assign a password and lock your smartphone, you must perform a hard reset to continue using your it. See "Performing a hard reset" in Appendix A for more information.

Technical Support

If, after reviewing the sources listed at the beginning of this appendix, you cannot solve your problem, contact your regional technical support office by e-mail, phone, or fax.

Before requesting support, please experiment a bit to reproduce and isolate the problem. When you do contact support, please be ready to provide the following information:

- The name and version of the operating system you are using
- The actual error message or state you are experiencing
- The steps you take to reproduce the problem
- The version of smartphone software you are using and available memory

To get version and memory information:

1. Tap to Open the Applications Launcher.

2. Tap the Menu icon .

3. Tap App, and then tap Info.

Note: Thousands of third-party add-on applications have been written for the Palm Computing platform. Unfortunately, we are not able to support such a large number of third-party applications. If you are having a problem with a third-party application, please contact the developer or publisher of that software.

B

C

APPENDIX C

Creating a Custom Expense Report

This section explains how to modify existing Expense application templates and how to create your own custom expense report templates for use with the Expense application.

Note: This section assumes that you are familiar with Microsoft Excel or a similar spreadsheet application. If you are not familiar with Microsoft Excel, consult your company's Information Services department or another experienced user.

About Mapping Tables

Before creating or modifying an Expense template, it's important to understand the function of the Palm™ Desktop software Expense application. In simple terms, the Expense application is designed to move Expense data from your smartphone into a Microsoft Excel spreadsheet.

Each Expense item stored in your smartphone represents a group of related data. The following data can be associated with an expense item:

- Category
- Date
- Expense Type
- Amount
- Payment Method
- Payment Currency
- Vendor
- City
- Attendees
- Note

When you perform a HotSync ® operation between your smartphone and Palm Desktop software on your computer, the Expense data is stored on your computer (in a file named Expense.txt). When you open the Expense application in Palm Desktop software, an Excel macro starts, and populates an expense template with your data based on the rules specified in a spreadsheet file named Map table.xls.

The Map table.xls file is an editable spreadsheet that functions as a "mapping table." The function of the mapping table is to guide the Excel macro in extracting the Expense data. The mapping table tells the Excel macro how large the spreadsheet is and provides the data-cell layout of the Excel template used for the Expense Report.

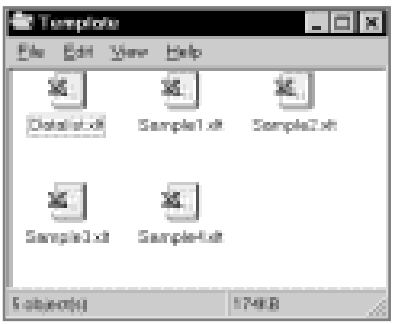
Customizing Existing Sample Templates

Four sample Expense Report templates come with Palm Desktop software. These templates are stored in the Template folder (which is in the same folder as the Palm Desktop software application).

If the layout of one (or more) of these templates is appropriate for your reporting needs, you can easily customize the templates with your company name and other information.

To customize a sample Expense Report template:

1. Make a backup copy of the contents of the Template folder.



2. Double-click the name of the sample template you want to modify to open it in Microsoft Excel.

3. Make any changes that you want to the names (or other information) in the sample template.

C

Important: Do not insert rows or columns in the sample template. Doing so changes the way your Expense data maps to the template and causes errors. If you want to move the cells to a different location or add or delete rows or columns, you have to make changes to the Map table.xls file.

Note: You can insert your own company logo without changing the Map table.xls file. If you change the file name, however, you need to make a corresponding change in the Map table.xls file.

You can also rename cells without changing the Map table.xls file, provided that the expense type corresponds to your smartphone data. For example, you can change "Snack" to "Munchies," and then all items entered on your smartphone as "Snack" map to the cell(s) labeled "Munchies."

4. From the File menu, choose Save As.

5. Click the Save as type drop-down list and choose Template (*.xlt).

6. Navigate to the Template folder (in the Palm Desktop software directory).

   Note: If you do not need to change the Map table.xls file, save the template file with its original file name (e.g., Sample2.xlt).

   If you do need to change the Map table.xls file, give your modified template a unique name. Be sure to use the .xlt file suffix, which defines the file as a Microsoft Excel template.

7. Click Save to save your modified template and make it available for future use.

Note: If you need to modify the Map table.xls file, you must do this before you can use the modified template with your Expense data. To modify the Map table.xls file for your new template, see "Programming the mapping table" later in this appendix. Read all of the sections of this appendix before making changes to the Map table.xls file.

Determining the Layout of the Expense Report

This section describes the layout considerations for the Expense Report and explains the terms used for creating the report.

Labels

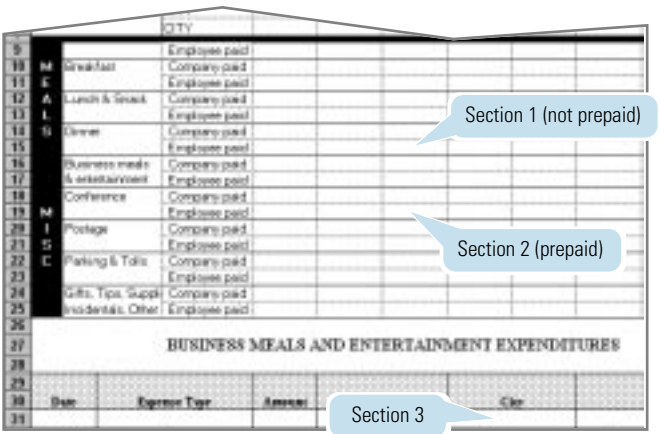
There are two kinds of labels that you need to define for your report: day/date and expense type. Each kind of label can be either Fixed or Variable. A Fixed label means that the label always appears as a header at the beginning of a row or column. If a label is not Fixed, it is variable.

For example, a list table of expenses could have variable labels in the rows for day/date, and variable labels in the columns for expense type. In this case, neither day/date or expense type information would be "fixed" (as a header). Instead, the date and expense type information would be filled into the cells of the spreadsheet as appropriate.

Examples of both Fixed and Variable labels appear in the sample expense templates.

Sections

A Section is an area of the report that has common formatting. It is common for an Expense report to have more than one Section. For example, the following sample Expense Report named Sample3.xlt contains several Sections.



Because your Expense data maps to row and column areas of your final report, different Sections require different definitions for the data mapping. To create additional Sections with different mapping, you create corresponding additional lines to the mapping table file named Map table.xls. This procedure is explained later in this appendix.

If a section contains cells for prepaid (company paid) expenses, you need to create an additional line in the mapping table for "prepaid." This will count as an additional section in the mapping table. The only data that differs in the prepaid section (from the non-prepaid section) is the row/column numbers for the expense type.

Analyzing Your Custom Expense Report

If you already have a custom Excel expense report, you can use it with a modified mapping table. However, before you can create a Map table.xls file that corresponds to your custom Expense Report, you must first analyze the characteristics of your report.

Perform the following before you begin a custom mapping table:

- Print a copy of your custom expense report. Activate the Row and Column Headings option in the Sheet settings of the Page Setup command. This enables you to quickly determine the size of the Section(s), as well as the numbers for the start rows and columns.

- On the printed copy, identify the data Sections. A Section is an area of data with common row and column formatting. A yellow highlighter marking pen can make it easy to see the Sections as you work with programming the mapping table. Your custom Expense Report can contain any number of Sections, and the same data can be repeated in any Section.

- On the printed copy, identify the type of Labels that apply to each Section. Each Section can have only one kind of Fixed or Variable Label for rows. Likewise, each Section can have only one kind of Fixed or Variable Label for columns.

- Place a copy of your custom Expense Report in the Template folder (in the Palm Desktop software directory). Change the file name so it has the file extension .xlt (which defines it as a Microsoft Excel template). Make a note of the exact file name so it can be defined in the mapping table file.

Programming the Mapping Table

Once you have analyzed the components of your custom Expense Report, you can program the mapping table to fill the report with data from the smartphone.

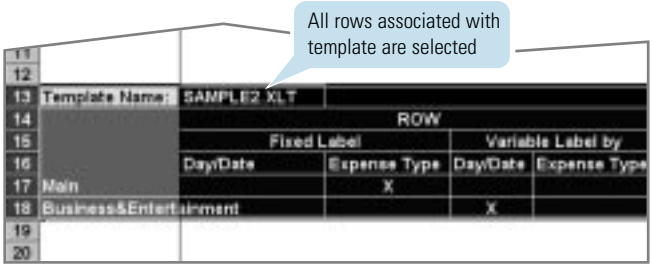
To program a new custom mapping table:

1. Open a copy of the Map table.xls file in Microsoft Excel.

   Note: This file is located in the same folder as the Palm Desktop software application. Make a backup copy of this file before you make your modifications.

2. Mapping a new template. Scroll to where you find the name of the original template that you chose for your modifications. The name of the template will appear in column B of the Map table.xls file, next to the cell highlighted in green that reads "Template Name:". If you did not modify an existing template, move to any table in the Map table.xls file.

3. Select all the rows associated with the template name. To select the rows, click and drag on the row numbers (left side), so they appear highlighted.



4. From the Edit menu, choose Copy.

5. Scroll down to a blank area of the Map table.xls file (below the rows used for Sample4.xlt), and click on a row number to select a blank row.

6. From the Edit menu, choose Paste. A copy of the rows you selected in step 3 is pasted into the Map table.xls file.

7. Name the table. In the cell immediately to the right of the cell entitled Template Name, enter the exact file name of your custom Expense Report template.

8. Define the number of Sections. Each row in a table defines how your smartphone data will be placed in a Section of your custom Expense Report. Note that the prepaid portion of a section has its own row and counts as a separate section for map table purposes, even though it is not a separate section in your template.

22	Template Name:	SAMPLE3.XLT	
23		ROW	
24		Fixed Label	
25		Day/Date	Expense Type
26	Main (PREPAID)		X
27	Main		X
28	Business Meals & Entertainment		
29	Mileage Log		

Table with four sections

You may add or delete rows as necessary so that the total number of rows corresponds to the number of Sections in your custom Expense Report. To clear all of the existing settings in a row, click to select the row and press Ctrl+Delete. Name each row to correspond to a Section of your custom Expense Report.

C

9. Determine the Label settings. The orientation of the data fields (Row, Column) appears in the yellow section of the table.

SAMPLE1.XLT						
ROW				COLUMN		
Fixed Label		Variable Label by		Fixed Label		
DayDate	Expense Type	DayDate	Expense Type	DayDate	Expense Type	DayDat
		x				

Determine whether the Rows will contain expense or date information, and place an “x” in the appropriate cell. When you do this, you also define whether the label is Fixed or Variable. You can place only one “x” in the Row section (columns 2–5).

Determine whether the Columns will contain expense or date information, and place an “x” in the appropriate cell. When you do this, you also define whether the label is Fixed or Variable. You can place only one “x” in the Column section (columns 6–9).

10. Define the dimensions of the Section. The dimensions of the Section appear in the green columns (10–13).

# of Rows	# of Columns	Start Row	Start Column
36		12	1

# of Rows Represents the total number of columns in the Section, excluding any header or total columns. Another words, this includes only the number of columns in the Section where your smartphone data will be placed.

# of Columns Represents the total number of rows in the Section, excluding any header or total rows. In other words, this includes only the number of rows in the Section where your smartphone data will be placed.

Start Row Is the number of the first row of the Section that will be filled with your smartphone data.

Start Columns Is the number of the first column of the Section that will be filled with your smartphone data.

11. Define the Dates and Intervals. The dates and intervals between dates appears in the light blue columns (14–17).

Date	Intervals Between		
Date	**Dates**	**Start day**	**Day**
1	0		

In the Date cell, enter the row or column number where all the date information will be placed.

In the Dates cell, enter the number of blank columns (or rows) separating the date fields. If there are no blank columns (or rows) between date entries, leave this number set to zero.

In the Start Day cell, enter the day of the week that starts the expense reporting period. Enter a three-character abbreviation for the day (e.g., Sun, Mon, Tue).

In the Day cell, enter the row or column number where all the day information will be placed. If the dates are in a row, enter the row number. If the dates are in a column, enter the column number.

12. Define whether the Section is in list format. This setting appears in the light purple columns (18–19).

Listing Format	**Expense Type**
YES	8

C

If the Section will present the data in a list format, enter the word “yes”. Otherwise, enter the word “no”. The following diagram shows data presented in a list format:

	Date	Category	Type	Amount	Country	Payment Type
7						
8						
9						
10						
11						

Only if your section is in list format: In the Expense Type cell, enter the number of the row or column where the expense description will be placed. Expense amounts can be entered in several different columns or rows if required by your template. Expense type labels must all appear in the same column.

13. Enter the row or column numbers for the expense types that appear in the Section. These settings appear in the aqua columns (20–48).

Expense Types					
Airfare	Breakfast	Bus	Business Meals	Car Rental	Dinner
4	4	4	4	4	4

For these settings, simply enter the row or column number for the expense types that you want to appear in the Section. Note that the same row or column number can be used more than once. An example of this would be meals that encompass breakfast, lunch, dinner, and snacks. In the previous example, all expense items would be populated into row/column 4 of the custom Expense Report.

14. Complete the table. All of the remaining columns (49–57) in the table are used to define the column or row number that corresponds to the description.

15. Mark a Section for prepaid expenses (yellow column). If a row in the map table is for prepaid (company paid) expenses, type a “yes” in the cell on that Section’s row. Type “no” in all the cells of this column that do not pertain to prepaid expenses.

[illegible]
PrePaid
NO
YES
NO

16. Repeat steps 9 through 15 for each Section that you have defined for your custom Expense Report.

17. Map Expense Report Options dialog (magenta section). The Expense Report Options dialog has five fields where you can fill in data for the header on your expense report. Use this section to specify the row and column on your template where this information will be mapped.

Employee Name		Department	
Header Row	Header Col	Header Row	Header Col
2	5	2	9

Because header data is not related to any particular Section, you have to fill in only one row. If the item does not appear on your template, leave these cells blank.

C

Using Applications Other than Microsoft Excel

You can use applications other than Microsoft Excel (such as Lotus 1-2-3 or Quattro Pro) to open and manipulate the Expense data on your computer. The data file is named "Expense.txt," and is stored in the Expense folder, within the folder containing the smartphone user data.

Expense data in the Expense.txt file is in tab-delimited format.

Expense File Details

The Expense.txt file contains four groups of data. It will be easier to see these four distinct groups of data if you open the file with a spreadsheet application.

Trips Shows the number of Expense application categories, and lists each one followed by an "end" statement.

Currency Shows how many currencies were used for the Expense data, and lists the countries that correspond to that currency.

Trip Shows the number of expenses by category, and lists the expenses for each category.

Expenses Shows the total number of expenses, and lists them chronologically.

D

APPENDIX D

Non-ASCII Characters for Login Scripts

The following information enables you to create custom login scripts that require non-ASCII characters. It is provided for advanced users who understand the use and requirements of such characters in a custom login script.

Use of ^char

You may use the caret (^) to transmit ASCII command characters. If you send ^char, and the ASCII value of char is between @ and _, then the character is automatically translated to a single-byte value between 0 and 31.

For example, ^M is converted to a carriage return. If char is a value between a and z, then the character sequence is translated to a single-byte value between 1 and 26. If char is any other value, then the character sequence is not subject to any special processing.

For example, the string “Joe^M” transmits Joe, followed by a carriage return.

Carriage Return and Line Feed

You may include carriage return and line feed commands as part of the login script, when entered in the following format:

<cr> Sends or receives a carriage return

<lf> Sends or receives a line feed

For example, the string “waitfor Joe<cr><lf>” waits to receive Joe followed by a carriage return and line feed from the remote computer before executing the next command in the script.

Literal Characters

The backslash (\ ) character defines that the next character is transmitted as a literal character, and is not subject to any special processing ordinarily associated with that character.

Examples:

\^ Includes a caret as part of the string

\< Includes a < as part of the string

\\ Includes a backslash as part of the string

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