

PDA User Guide



<http://www.uic.edu/depts/lib/lhs/resources/pda/>

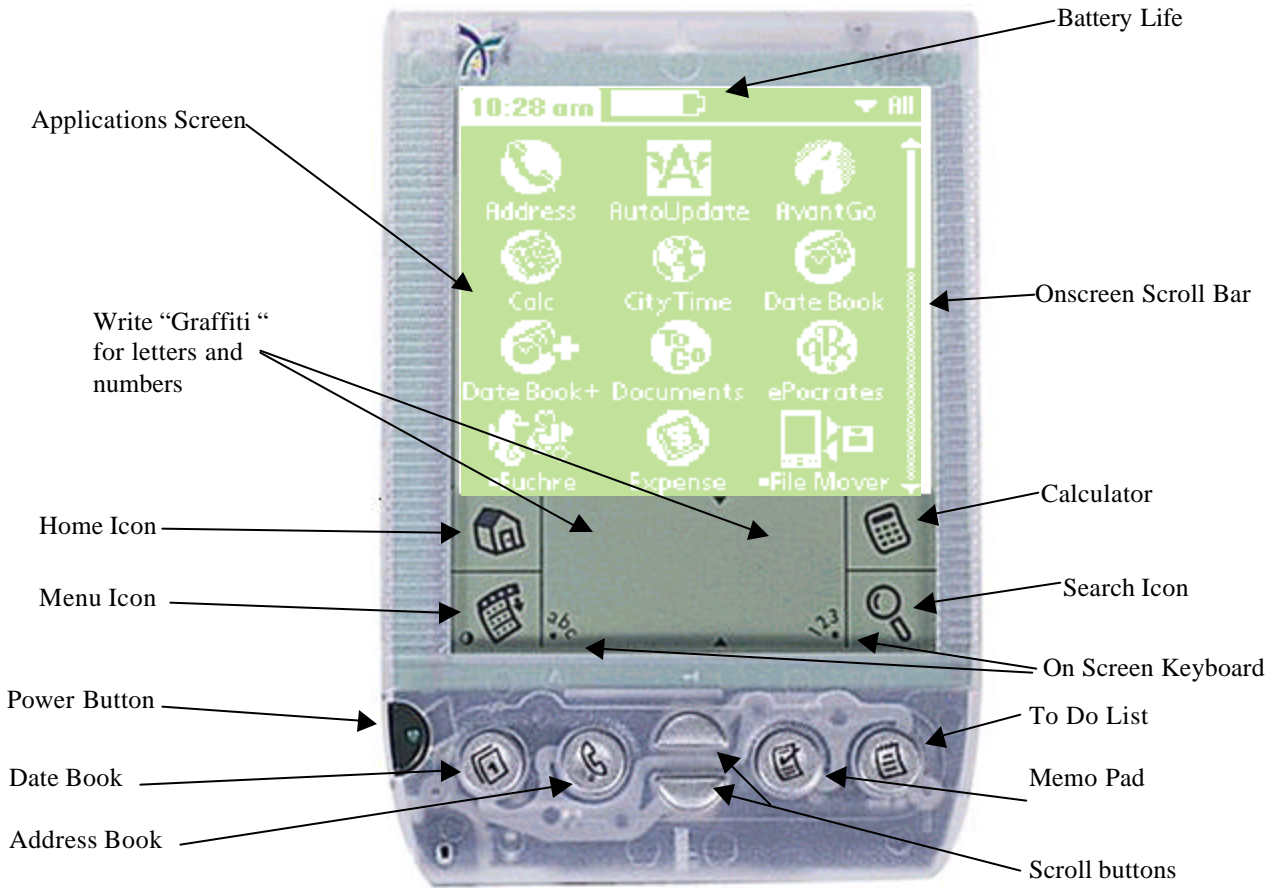
Disclaimer : This guide is not intended to be exhaustive of PDA information and resources.

PDA User's Guide

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Basic PDA Layout



Why use a PDA?

PDA's are great devices for keeping a Date book, Address book, memos, reference books, calculators, medical reference software, and other programs all in one location. They fit in the palm of your hand and can easily fit into a pocket or handbag.

Palms (OS) vs. WinCE (Pocket PC)

The type of PDA you purchase will largely determine what you can do with your PDA.

Most will suggest purchasing a Palm (OS) over the Pocket PC for a variety of reasons, particularly if you are working in the Health Sciences.¹²³⁴

1. Battery Life – The battery life on PDA's is longer than that of Pocket PC's
2. Software - An estimated 80% of software has been created for the PalmOS.
3. Speed – Palms run faster than Pocket PC's
4. Complexity – Pocket PC's are reportedly more complex to learn over the Palm.
5. Display - Pocket PC's have larger screens and a better display.

Overview of PDA devices: <http://www.library.uthscsa.edu/internet/pda.cfm?CatID=1>

Things you may want to consider when buying a PDA include price, size of memory (don't purchase anything less than 8MB), expandability (add-on memory, programs, and devices), size, display, software available, battery life, operating system (PalmOS vs WinCE), and infrared capabilities.

Using your PDA

Your PDA should come with enough information to get you started. The most important things you need to do when you purchase a palm is loading the CD software for your Palm, and attaching your PDA cradle to the right port on your computer. It is probably a good idea to at least browse your PDA manual at the start. Most PDA's also have support guides and help on their websites.

Opening and Using Programs

Turn on PDA.

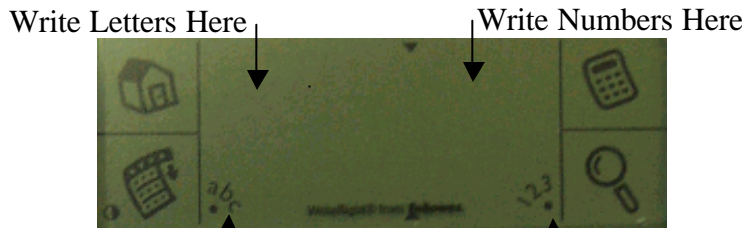
Tap the Home icon to view all PDA applications if they are not already visible. Use the scroll bar on the right side of the screen or the up and down arrow keys on the bottom of your PDA to move the screen up or down. Tap an application once to open it. Once an application is open, most are ready for use. Click on the menu icon for more commands and options.

- Home Icon** —————→
- Tap to view applications.
- Menu Icon** —————→
- Tap to view options for PDA or current application.



Entering Data into Your PDA (four options):

1. **Graffiti** – PDAs have their own unique letter / number writing styles called “graffiti.” Writing numbers and letters in the graffiti style is a quick way to enter data into the PDA. The stylus is used to write the graffiti in the area shown below on your PDA. Consult with your PDA users guide to learn how to write the letters and numbers graffiti style. Most PDAs come with a program to practice your graffiti skills.



Online Keyboard for Letters

Online Keyboard for Numbers

2. **Onscreen Keyboard** – PDAs come with an onscreen keyboard where individual letters and numbers can be tapped to enter the data. Open the application you wish to use. Tap in the spot where you need to enter data. In cases where you are entering new information, tap “New”. Next, tap the “abc” or “123” icon on the lower part of the PDA screen. Once the onscreen keyboard appears, tap on the letter or number you want entered. When you are done entering the data, Tap “Done” to close the online keyboard.



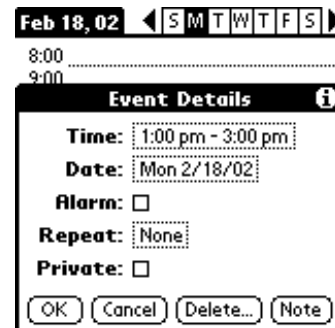
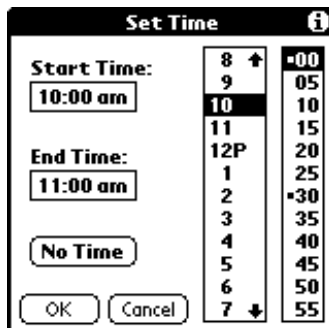
3. **PDA Keyboards** - Accessories such as Keyboards can be purchased for use with a PDA. Use these to type as you would a regular keyboard. Certain keyboards go with certain types of PDAs.
4. **Personal computer** - Enter data into the PC version of an application that talks to your Palm. When you perform your next hotsync, the data will appear on your palm.

Date Book

To enter data into your date book, tap either the “DateBook” icon on your screen or the Date Book button on the bottom of your PDA. Your Date Book can be displayed in either day, week, or month format. Select the view you wish. To enter in new data or edit info you must be in the day view.

To enter in **new data**, Tap “New” and fill in the display. To edit data, tap on the entry you wish to edit. Next Tap “Details.” Edit as needed. The alarm can also be set at this point.

To **delete** an appointment, tap on the entry you wish to edit. Next tap “Details”. Tap “Delete”. Tap OK if you are sure you want to delete.



Address Book

To **enter data** into your Address Book, tap either the "Address" icon on your screen or the Address button on the bottom of your PDA. To add a new person to your Address List, tap "New". Fill in the needed address fields. Use your scroll buttons to view all the fields. When done filling in the address information, file the name in a category (e.g. Personal, Business) or leave as "Unfiled". This feature is found in the top right corner of the screen. To create a new category, under the "Unfiled" pull down menu, click on "Edit Categories". Tap New, and enter in the name of your category. Tap the name of the category for it to be filed under. Tap OK.

Once all the data entry is complete - tap done.

To **view or edit** the contact information in your PDA, tap on the name you wish to view. Tap Edit if you need to change any information.

To **delete** a name, tap the name you wish to delete. Tap "Edit". Tap "Details" Tap "Delete" Tap "Ok" if you wish to delete.



Beaming Your Business Card and other Addresses

To **beam** someone **your business card**, you need to have set up your address entry as the business card. To set your address up as the business card, tap on the Address icon or the Address button to open up your address book. Tap on your name. (Create an address entry for yourself if you haven't already done so.) Once your address information is open, tap on the Menu Icon. Tap "Select business Card" that appears in a box in the top left corner. Tap "Yes" to make your name the business card.

To beam your card, tap on your name. Next tap on the Menu Icon. Tap "Beam Business Card" that appears in a box in the top left corner. Your PDA will beam your card to the nearby PDA.

You only need to set up your address as the business card once. In the future, to beam your business card, tap on the Address icon or the address button. Tap on the Menu Icon. Tap "Beam Business Card."

You can also **beam** your other **addresses by category**. In other words, you can beam an entire category at once to someone. To beam a Category, tap on the Address icon or the Address Button to open up your address book. In the top right corner, select the category you wish to beam from the pull down menu. This will display only those addresses in the category. Tap on the Menu Icon. Tap "Beam Category."



Look Up:

Filing Applications

Organize the applications on your PDA by category. Categories included games, main, system, utilities and unfiled, or you can create your own. To file an application, you need to be on the Main applications screen of your PDA. Click on the "Home" icon to view the applications screen. Next click the "Menu" button. A small box will pop up in the left corner of your screen with APP in black and several options listed below. Tap on Category. Tap on the Pull Down Menu next to the application you wish to file. Select the Category. To create a new category, Tap "Edit Categories". Tap "New". Enter in the name of the Category and tap OK. Tap the name of the Category. Tap OK again. Tap Done.



Deleting Applications

To Delete an application, you need to be on the Main applications screen of your PDA. Click on the "Home" icon if you are not already on Home screen. Next click the "Menu" button. A small box will pop up in the left corner of your screen with APP in black and several options listed below. Tap on Delete. A list of all your applications and their size should appear. Tap the application or file you wish to delete. Tap "Delete". If you are sure you want to do this, tap "Yes". Tap "Done."



Memory Available

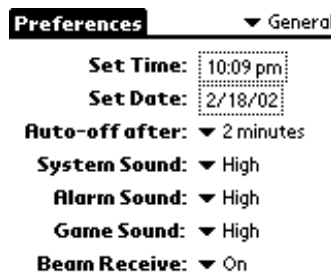
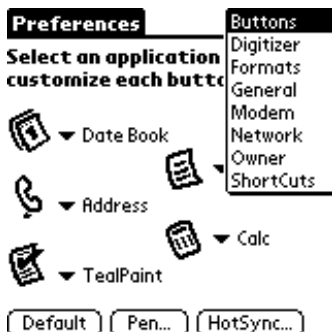
To find out how much memory you have available on your PDA, you need to be on the Main applications screen of your PDA. Click on the "Home" icon if you are not already on Home screen. Next click the "Menu" button. A small box will pop up in the left corner of your screen with APP in black and several options listed below. Tap on Info. You will see how much memory is Free. In addition, a list of your applications appear and the amount of space/memory they use.

Beaming an Application

It is possible to beam people programs that you have on your PDA provided there is not a "lock" next to the memory size. To beam an application to someone, you need to be on the Main applications screen of your PDA. Click on the "Home" icon if you are not already on Home screen. Next click the "Menu" button. A small box will pop up in the left corner of your screen with APP in black and several options listed below. Tap on Beam. Tap the application you wish to beam and tap "Beam." Your PDA will try to locate the PDA being beamed. PDAs need to be in close range for the infrared beaming feature to work.

Setting Preferences on your PDA

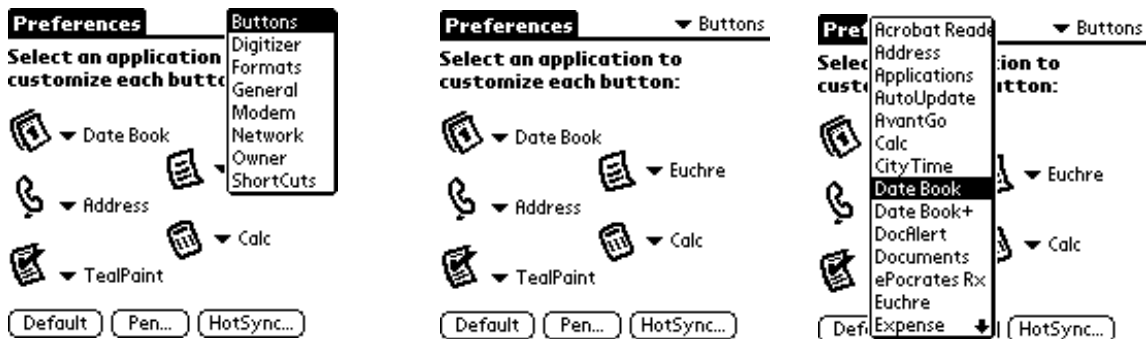
There are several things you can do to personalize and change the settings on your PDA. Items to personalize include Buttons, Formats (time and date display), General (set time, dates, and sound), and ShortCuts (PDA shorthand).



Personalizing Buttons

The four quick access buttons on the PDA (datebook, phonebook, ToDo List, Memo Pad) and the Calculator Icon can be altered to open a different application than the default. For example, the Calculator Icon can be changed to open up a game of Euchre when tapped rather than open the calculator.

To personalize the buttons or icons on the PDA, Tap the Home button to view the PDA applications. Tap "Prefs" for Preferences from the applications screen. From the pull down menu on the top right corner of the screen, select "Buttons." Tap the Pull Down menu on the Screen next to the Icon or Button that you want to customize to another application. From the Pull Down Menu, select the application.



Backing up your PDA on your Computer

You should periodically back up your PDA with your computer through a process called "hotsyncing." To back up your PDA (or to hotsync), simply place the PDA in the hotsync cradle and push the hotsync button. This will update and back up your address book, datebook, and any programs you have connected to the Internet (Epocrates, AvantGo). Programs connected to the Internet will only be updated if your computer is connected to the Internet at the time of the hotsync.

If for some reason your PDA goes dead or performs a fatal error, you will have to perform a hard reset on your PDA. This will wipe your PDA clean but items such as your datebook and address book will be automatically restored when you hotsync. You may need to hotsync one or two more times to complete restoring your PDA. You may have to reinstall some of the programs back onto your PDA manually. It is a good idea to be downloading and storing your PDA programs all in one folder on your PC so that you may easily find and reinstall these programs when needed. Also keep your registration codes for software that you have purchased in the event these need to be re-entered when you reload your PDA. It may also be helpful to keep a record of the programs you like to have installed on your PDA for backup and restoring purposes.

Troubleshooting

There are times where you need to do soft resets and hard resets to your PDA. If your PDA does not appear to be responding - try a soft reset. Use the tip of a paperclip to gently press the reset button (found on the back of your PDA). This will not erase information from your PDA. If your PDA won't turn on or is frozen from a fatal error, you may need to perform a hard reset. Hold down the power button and then use the tip of a paperclip to gently press the reset button. Release the power button. A warning message will appear noting that if you press the UP arrow, you will erase your PDA. Press the UP arrow if you need to perform the hard reset. Refer to your PDA manuals and Tech Support for these and other problems.

Avant Go (Web Page Viewer)

AvantGo is a free Internet service that allows you to place copies of web pages onto your palm. Ideas for using this service include placing the current Table of Contents and Abstracts from journals onto PDAs for keeping abreast of the literature. You can also place webpages with contact names, practice guidelines, or other sorts of information on your PDA.

To start using AvantGo - go to www.avantgo.com. Look over the page and click on the link for "New User" so that you can register with your own name and login. In order for your PDA to talk to any Internet sites you want placed on your handheld, software needs to be loaded on both your PC and your PDA. Before you click on the link for "New Users Click Here" ensure you have the software requirements. The Avanto Go website will take you step by step through the process of loading the necessary software on your hardware devices. Click on "New Users click Here" to begin and follow the screen prompts.

Once you have Avant Go set up, you can select the websites that you want added to your PDA. Adding channels to Avant Go can be done best with 2 copies of your Internet browser open. In one browser, find the web page you want to place on your PDA. Have the second browser opened up to AvantGo. Login to AvantGo and click "Create Channel." Copy the URL of the Webpage you want placed on your PDA. Paste this URL in the text box titled "Location." Type the name you want to give this channel in the "Title" text box. For Channel Size enter a number between 100 and 300 to start with. A number of 3-5 is good to start with for Link Depth. Leave the rest of the options as the default. When you are done, click "Save Channel." The next time you hotsync, the channel (web page) should appear on your PDA.

Title:

Location:

CHANNEL SIZE

Maximum Channel Size: k

Link Depth:

Include Images: Yes No

Follow Off-Site Links: Yes No

CHANNEL REFRESH

REFRESH:

on every sync

every: hour(s)

only once

daily at :

on the following days:

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Adding software

Locate the program you want to add to your PDA on the web. Ensure you have the correct system and space requirements.

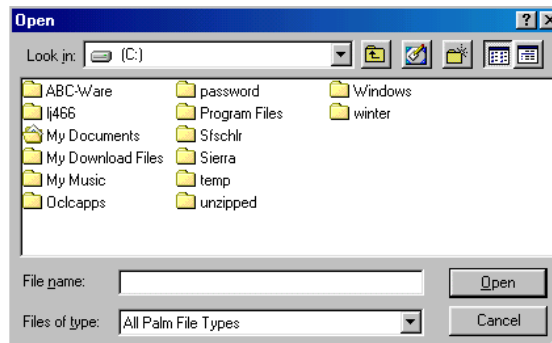
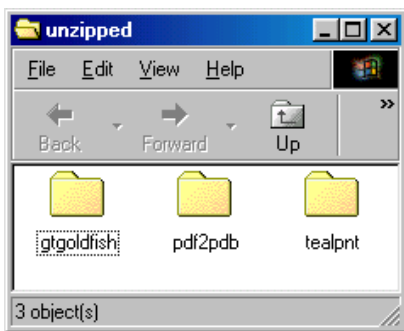
Download the program from the web onto your PC.

Many PDA programs come in zip files. You will need to have an unzip program installed on your computer to unzip the program.

Many programs that are downloaded in the zipped format will self-extract to the correct folder and automatically place the needed PDA files in the Install Tool. The next time you hotsync, these files will be placed on your PDA.

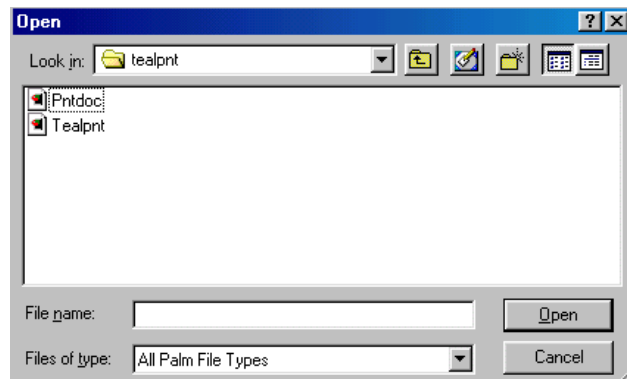
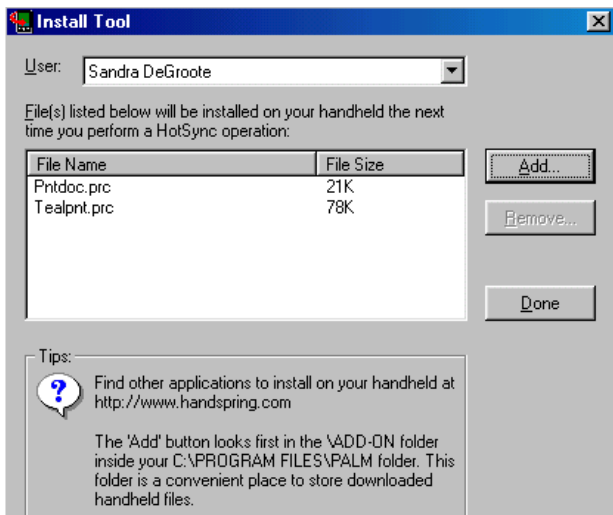
To check if the self-extraction has occurred, open up the Install Tool from your PDA Desk Top. If you see files listed under File Name, this is a good sign the self-extraction has automatically occurred. Often your Install Tool will automatically pop up after extraction with the files listed under File Name.

If after extracting a file, you do not see any files listed within the Install Tool, you will need to place them there yourself. Hint: Many zip programs will place the extracted files in a folder within an “unzipped folder.” Look there first if you are unsure where your extracted files have been placed.



Once you know where your extracted files are located, open up the “Install Tool.” Click on “Add.” A box will appear. In the location next to “Look in”, click on the correct drive where your folder is located. Next click on the necessary folders until you are at the folder where your PDA files are located. Click on the files you want loaded onto your PDA and click “Open.” Repeat this process as necessary.

Once you are done, click “Done”. The next time you hotsync, those files will be placed on your PDA.



Security

Use the security feature on your PDA to prevent others from viewing records deemed “private” on your PDA.

These private records can only be viewed with a password.

To **assign a password**. Tap the applications Icon to arrive at the applications screen. Tap on the Icon “Security”. Tap the box next to “Password.” Enter in a password and tap Ok. You will be prompted to confirm the password. Reenter your password and tap Ok.

To **Turn on the Security Feature**, you must lock your PDA. After a password has been assigned, Tap “Turn Off & Lock Device”. Tap “Off & Lock”. This will turn off your PDA. The next time you turn on your PDA, you will be prompted for your password. You can select at that point to “Show” or “Hide” your private records. This will only happen once unless you repeat this step every time you turn off your PDA.

Whenever you decide to view your private records, you must go to “Security” and tap on “Show”. You will be prompted for your password.

To **assign a record as private**, you must be in the “Details” level of the record. For example, in the address book, to mark a record as private, tap the record you wish to make private. Next tap “Edit”. Tap “Details” and tap the box next Private. Tap Ok. Tap Done.

Note: If you forget your password, you may go to “Security” and Tap on “Forgotten Password.” This will remove all records deemed “private”. To restore the private records, you need to perform a Hotsync. If you forget your password after having selected the feature “Off & Lock”, you will need to perform a “Hard Reset”. This will erase all information from your PDA. To restore your PDA, perform a Hotsync. You may have to hotsync your PDA several times to complete restoration.



References

- 1.http://www.medicine.dal.ca/home/publication/Palm_Recommendations_July_2001.pdf
- 2.<http://edcenter.med.cornell.edu/Courses/Palm.html>
- 3.<http://www.urmc.rochester.edu/FamMed/PDAatFMC.htm>
- 4.Stoddard, Mari. Handhelds in the Health Sciences Library. *Medical Reference Services Quarterly*, Vol. 20(3), Fall 2001. Pgs. 75-82.

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