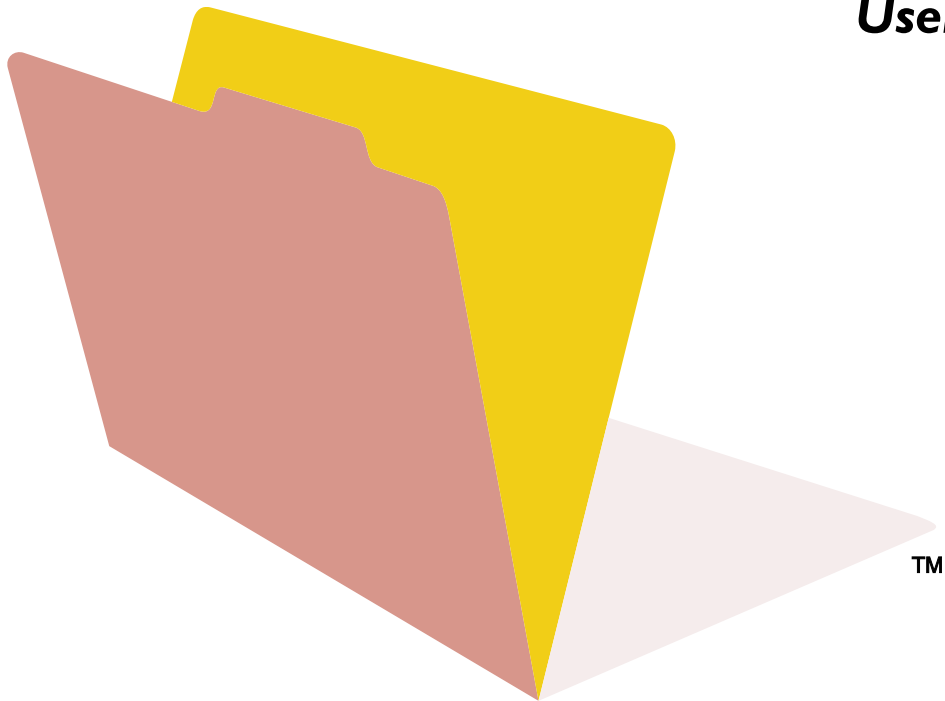


For Windows, Mac, and Palm OS

FileMaker Mobile

Companion for Palm OS

User's Guide



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Chapter 1

Installing FileMaker Mobile

With FileMaker® Mobile and a Palm OS handheld you can:

- select entire or partial information from FileMaker Pro databases to load onto your handheld
- view, add, modify, and delete records in your databases when you are away from the office
- synchronize changes made to both your desktop databases and handheld databases

If you're new to the Palm OS, you need to know how to use the HotSync software to synchronize information on your handheld with information on your computer. If you have not performed a HotSync operation with your handheld before, see the documentation that came with it.

Registration and customer support

Please take the time to complete and mail the registration card for your product, or register online at www.filemaker.com/register/.

For information about technical support and customer service, see:

www.filemaker.com (North American customers)

www.filemaker.com/intl/ (customers outside of North America)

On the web site, you will find the FileMaker, Inc. Service Directory, which details the service options available to North American customers, as well as links to FileMaker, Inc. international sites, answers to frequently asked questions, and access to extensive software libraries used by technical support staff. If you do not have access to the Web, please refer to the FileMaker support/service sheet included in the software box. North American customers can also call 1-800-965-9090 to learn about the service options available.

What you need to install FileMaker Mobile

Desktop requirements (Windows):

- FileMaker Pro 5.0v3
- an Intel-compatible PC with a Pentium processor 90 MHz or higher
- at least 32 MB of RAM
- Windows 95, Windows 98, Windows NT 4.0 (with Service Pack 3 or later), Windows 2000
- a CD-ROM drive
- Palm Desktop 3.0.1 or later; HotSync Manager 3.0.2 or later

Desktop requirements (Mac OS):

- FileMaker Pro 5.0v3

- a Power Macintosh or Mac OS computer with a PPC 601 processor or higher
- at least 32 MB of RAM
- System 8.1 through System 9.0.x
- a CD-ROM drive
- Palm Desktop 2.5 or later; HotSync Manager 2.5 or later

Handheld requirements:

- Palm OS 3.1 or later
- 2 MB storage minimum
- HotSync cradle

Installing FileMaker Mobile plug-in and conduit (Windows)

You install the FileMaker Mobile plug-in and conduit on your computer and then install the FileMaker Mobile application on your handheld.

To install the FileMaker Mobile plug-in and conduit:

1. Exit other open programs and turn off virus protection utilities.
2. Insert the CD-ROM into your CD-ROM drive.
3. Double-click **Setup**.
4. Click **Next** to review the license agreement.
5. Accept the license agreement and click **Next**.
6. Enter your name and company information and click **Next**.
7. Enter the installation code and click **Next**.
8. Click **Install** to begin installing FileMaker Mobile.
9. Click **Finish** to exit the installer.

Installing FileMaker Mobile plug-in and conduit (Mac OS)

You install the FileMaker Mobile plug-in and conduit on your computer and then install the FileMaker Mobile application on your handheld.

To install the FileMaker Mobile plug-in and conduit:

1. Exit other open programs and turn off virus protection utilities.
2. Insert the CD-ROM into your CD-ROM drive.
3. Double-click **Install FileMaker Mobile**.
4. Click **Accept** to accept the license agreement.

5. Click **Install** to begin installing FileMaker Mobile.
6. Enter your name and company information.
7. Enter the installation code and click **OK**.
8. Click **Quit** to exit the installer.

Installing FileMaker Mobile application on the handheld

To install the FileMaker Mobile application on your handheld:

1. Launch the Palm Desktop application.
2. Click the **Install** tool (Windows) or choose **Hot Sync** menu > **Install Handheld Files** (Mac OS).
3. Click **Add** (Windows) or **Add To List** (Mac OS).
4. Navigate to the folder where the FileMaker Mobile application for the handheld was installed (see the tables in the next section).
5. Select **FileMaker Mobile.prc**.
6. Click **Open**.
7. Perform a **HotSync** operation to install the application on your handheld.

Chapter 2 tells you how to transfer your databases to your handheld.

Where files are stored on your hard disk

The following tables show the files and folders that are installed, and the preferred location for them on your hard disk.

Installed items (Windows)

Folder location	File or folder	Description
C:\Program Files\FileMaker\FileMaker Pro 5\System	Mobile Companion Palm OS.fmx	Mobile Companion for Palm OS plug-in
C:\Palm	FileMaker Conduit.dll	FileMaker HotSync conduit
C:\Palm\Add-on	FileMaker Mobile.prc	FileMaker Mobile application for the handheld
C:\Program Files\FileMaker\FileMaker Pro 5\Mobile	FileMaker Mobile UG.pdf	FileMaker Mobile User's Guide
C:\Program Files\FileMaker\FileMaker Pro 5\Mobile	Mobile Readme.txt	Late-breaking news about FileMaker Mobile

Installed items (Mac OS)

Folder name	File or folder	Description
FileMaker Pro 5 Folder:FileMaker Extensions	Mobile Companion Palm OS	Mobile Companion for Palm OS plug-in
Palm:Conduits	FileMaker Conduit	FileMaker HotSync conduit
Palm:Add-on	FileMaker Mobile.prc	FileMaker Mobile application for the handheld
FileMaker Pro 5 Folder:Mobile	FileMaker Mobile UG.pdf	FileMaker Mobile User's Guide
FileMaker Pro 5 Folder:Mobile	Mobile Readme.txt	Late-breaking news about FileMaker Mobile

Chapter 2

Setting up FileMaker Mobile

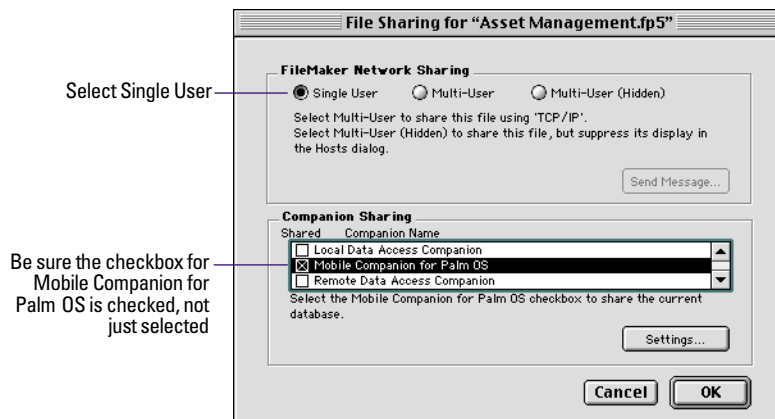
This chapter tells you how to set up FileMaker Pro databases to work with FileMaker Mobile and how to check which databases are ready to be loaded onto the handheld.

Setting up FileMaker Pro databases to work with FileMaker Mobile

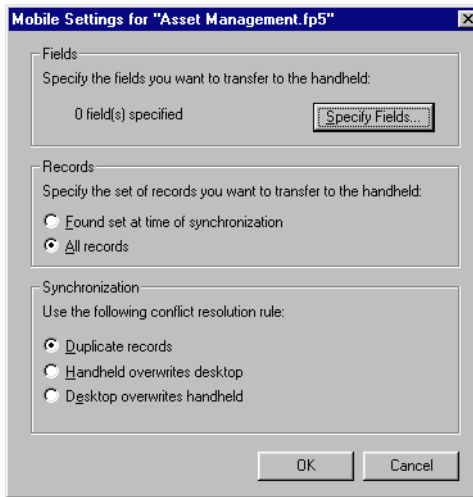
Note To set up databases, your access privileges must include Design Layouts.

To set up a FileMaker Pro database to work with FileMaker Mobile:

1. Open the FileMaker Pro database you want to load onto the handheld.
2. Choose File menu > Sharing.
3. In the File Sharing dialog box, select Single User and Mobile Companion for Palm OS.



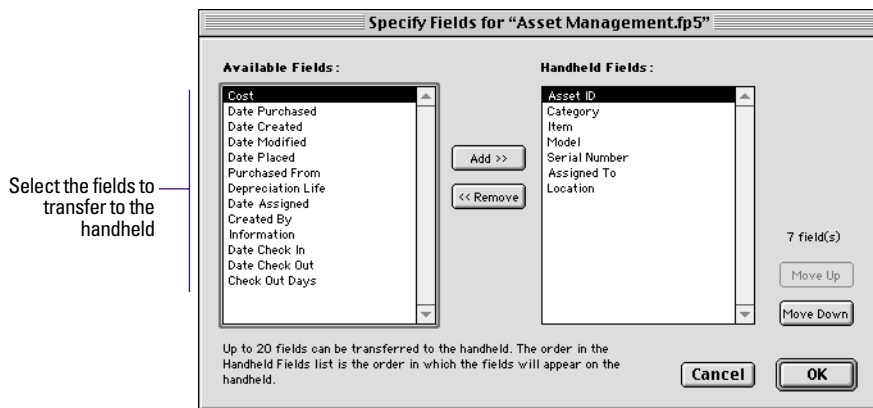
4. Click Settings.



5. Click **Specify Fields**.

6. In the **Specify Fields** dialog box, in the **Available Fields** list, select the field you want to transfer to the handheld and click **Add**. Repeat this step for each field you want to transfer.

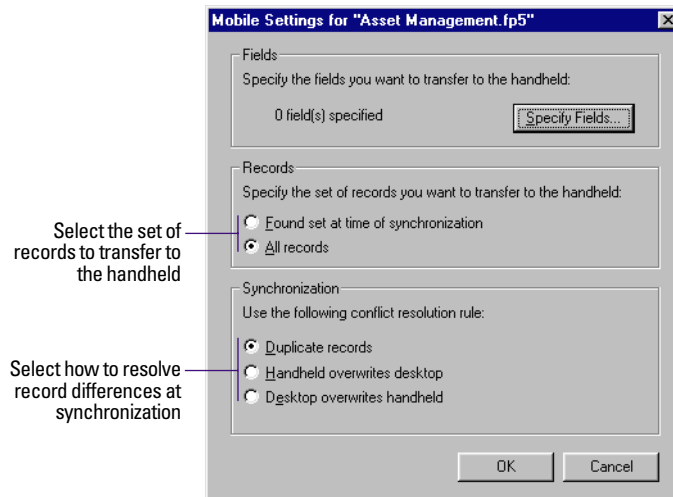
You can transfer up to 20 fields and their data. Only Text, Number, Date, and Time field types can be transferred and only these will appear in the **Available Fields** list.



To change the order that fields will appear on the handheld, select a field in the **Handheld Fields** list and click **Move Up** or **Move Down**. Arrange the fields now in the order you want them to appear on your handheld.

7. When you're done, click **OK**.

8. In the **Mobile Settings** dialog box, select the set of records you want to transfer to the handheld and how you want to resolve record differences at synchronization.



If you want to load only a subset of records onto your handheld, select **Found set at time of synchronization**. Then find the records you want to include before performing a HotSync operation.

The synchronization process has two steps: First, changes in the handheld records update the desktop database. Then FileMaker Mobile loads the current found set from the desktop database onto the handheld.

When you modify the same records in both the handheld database and the desktop database, FileMaker Mobile uses one of the following options to resolve differences at synchronization.

Choose this option	To do this
Duplicate record	Create and place handheld records in the desktop database. See “Finding duplicates” on page 3-6 in the <i>FileMaker Pro User’s Guide</i> for information about finding duplicate records.
Handheld overwrites desktop	The handheld record replaces the desktop record.
Desktop overwrites handheld	The desktop record replaces the handheld record.

9. Click **OK**, then **OK** again.

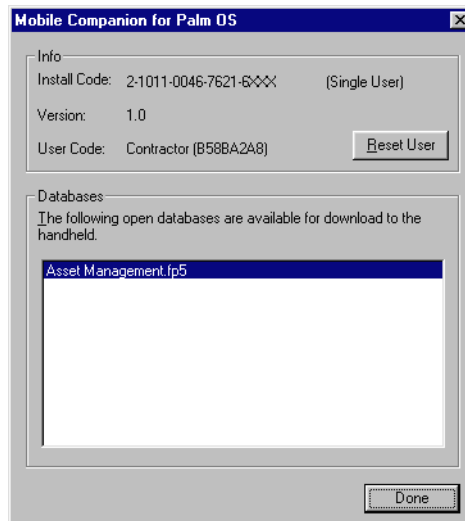
Repeat steps 1-9 for each database you want to share with the handheld.

Checking which databases are ready to load onto the handheld

To check which databases are ready to load onto the handheld:

1. Choose **Edit menu > Preferences > Application**.
2. In the **Application Preferences** dialog box, click the **Plug-Ins** tab.
3. Select **Mobile Companion for Palm OS**.

4. Click Configure.



5. In the Mobile Companion for Palm OS dialog box, databases that are open and can be synchronized with the handheld are listed.

6. Click Done.

Chapter 3

Using FileMaker Mobile

This chapter explains how to work with data in databases on your handheld.

Loading a FileMaker Pro database onto your handheld

To load one or more databases onto your handheld:

1. In FileMaker Pro, open the database(s) that you have already set up to work with FileMaker Mobile.

Make sure each database's current found set contains the records you want to transfer to the handheld.


See chapter 2, "Setting up FileMaker Mobile," for more information.

2. Perform a HotSync operation.

Warning Do not interact with FileMaker Pro during the HotSync operation.

Opening a database on the handheld

To open a database on the handheld:

1. In the handheld's Applications Launcher, tap the FileMaker Mobile icon.  FileMaker

If you do not see the FileMaker Mobile icon, change the applications category to All.

2. Tap a database in the list.

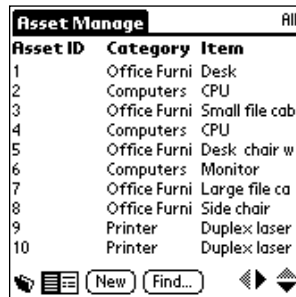
Databases are listed in the order they were loaded onto the handheld.



Database list

Viewing records

You can look at records one by one or in a list. Up to three fields at a time are displayed in list view.



List view

Tap anywhere in a line to switch to record view



Record view

You can edit fields in record view

To	Tap
View the list of databases	
View records in a list	
View one record at a time	
In record view, scroll record to record	
In record view, scroll field to field	
In list view, scroll column to column	
In list view, scroll list up and down	

You can also navigate by pressing the scroll buttons on the front panel of your handheld.

Adding records

To add a record, tap **New**. Tap a field to select it and start entering information. Use the stylus to write Graffiti characters in the writing area or use the onscreen keyboard. The new record is added after the last record.

Finding records

To find records:

1. Tap **Find**.
2. From the field pop-up menu, select the field you want to search in.
3. Enter the word or first few characters of the item you want to find and tap **OK**.

Sorting records

To sort records:

1. Choose **Record** menu > **Sort Records**.
2. From the field pop-up menu, select the field you want to sort by.
3. Select **Ascending Order** or **Descending Order** and tap **OK**.

Dates and times are sorted as if they were text. For example, if **Ascending Order** is selected, the date 11/11/2001 will be sorted before the date 8/02/2001.

You can also sort records in list view by tapping a column heading. The underlined column heading indicates that the records are currently sorted by that heading.

Deleting a record

To delete a record from a database on the handheld:

1. Select the record.
2. Choose **Record** menu > **Delete Record**.

To also delete the corresponding record in the desktop database the next time you do a HotSync, select **Delete original on PC**.

3. Tap **OK** to confirm the action.

Deleting all records in a found set

To delete all of the records in the current found set:

1. Choose **Record** menu > **Delete All Records**.

To also delete all of the corresponding records in the desktop database the next time you do a HotSync, select **Delete originals on PC**.

2. Tap **OK** to confirm the action.

Deleting a database from your handheld

To delete a database from your handheld:

1. Choose **Database** menu > **Delete Database**.
2. Select a database and tap **Delete**, then tap **Yes** to confirm the action.
3. Tap **Done**.

Setting preferences

To allow the active FileMaker Mobile database to be searched when you use the Palm OS Global Find command:

1. Choose Options menu > Preferences.
2. Select Include in Global Find.
3. Tap OK.

Synchronizing information between your handheld and computer

To synchronize information between your handheld and computer:

1. Launch FileMaker Pro on the desktop.
2. Open the databases you want to synchronize with.

Be sure all the databases are shared with Mobile Companion for Palm OS (see “Setting up FileMaker Pro databases to work with FileMaker Mobile” on page 2-1).

Make sure each database's current found set contains the records you want to transfer.

3. Perform a HotSync operation.

Warning Do not interact with FileMaker Pro during the HotSync operation.

Chapter 4

Frequently asked questions

Beaming

Can I beam a record? a database? the FileMaker Mobile application?

- FileMaker Mobile does not support beaming.

Data entry

How should I enter years in records on the handheld?

- It is recommended that you enter years as four-digit numbers. Two-digit year entries from sources external to FileMaker Pro are interpreted as “19xx” in FileMaker Pro.

Error messages

Why do I get the error message “The nnn database does not contain any fields.”?

- At the time you set up your database, no fields were selected to be transferred to the handheld. In the Specify Fields dialog box, select the fields you want to transfer (see chapter 2, “Setting up FileMaker Mobile,” for more information).

Field contents

Why can't I see all of the contents of a field?

- A field's display is limited to the size of the screen. To view a field's entire contents, tap the last line in the field and drag the stylus downwards. The text that was hidden (up to the limit of approximately 2000 characters) scrolls into view.

Field definitions

What if I change a field definition in my desktop database?

- If you change a Text field to a Number, Date, or Time field, any data after the first 255 characters will be deleted. If you then also make changes to the data in the corresponding field on the handheld, FileMaker Mobile writes the modified records to a comma-separated values file, which is stored in the FileMaker Mobile folder inside the handheld user directory. For example, Windows:
C:\Palm\[YourName]\FileMaker Mobile\Asset Management.csv.
Mac OS: Palm: Users: [YourName]: FileMaker Mobile: Asset Management.csv.

Then use the **Import Records** command in FileMaker Pro to import the data into your desktop database. After you have imported the records, delete the comma-separated values file. See chapter 12, “Importing and exporting data,” in the *FileMaker Pro User's Guide* for more information.

FileMaker Mobile limits

What is the maximum field size?

- A text field can contain 2KB of information, approximately 2000 characters. Number, date, and time fields can contain up to 255 characters.

What is the maximum number of fields per handheld database?

- You can have up to 20 fields per handheld database. If you try to add more than 20 fields, the Add button dims in the Specify Fields dialog box.

What is the maximum number of records per handheld database?

- You can have up to 5000 records per database, depending on how much memory is available on your handheld.

What is the maximum number of databases that can be loaded onto the handheld?

- You can have up to 50 FileMaker Pro databases on your handheld, depending on how much memory is available on your handheld.

What if I load a record or field that is too large to fit on the handheld?

- If a record contains one or more fields with more than 2KB of information, the record is not loaded onto the handheld.

HotSync

Where can I see the date and time of the last HotSync operation?

- Launch the HotSync application on your handheld. The date and time of the last HotSync operation appear at the top of the screen.

Where can I see the log of the last HotSync operation?

- In the Palm Desktop, choose HotSync menu > View Log.

Product information

- See www.filemaker.com for up-to-date product information.

Setup

I went through the process for setting up a database. Why didn't it appear on my handheld?

- In the FileMaker Pro Sharing dialog box, be sure Single User is selected and the checkbox for Mobile Companion for Palm OS is checked, not just selected.

Using a different handheld

What if I replace my handheld and want to use the new device with FileMaker Mobile?

- You can reset FileMaker Mobile to work with a different handheld.

Note For backup purposes, first perform a HotSync operation to synchronize your databases with your old handheld.

1. In FileMaker Pro, choose Edit menu > Preferences > Application.
2. Click the Plug-Ins tab.
3. Be sure Mobile Companion for Palm OS is selected and click Configure.
4. In the Mobile Companion for Palm OS dialog box, click Reset User.
5. Install the FileMaker Mobile application on the new handheld.
6. Set up the databases for transfer to the handheld.
See chapter 2, “Setting up FileMaker Mobile” for more information.
7. Perform a HotSync operation to transfer the databases to the new handheld.

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