
Quick Start for Palm OS Devices

Notify Technology Corporation



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Quick Start Guide: NotifyLink for Palm OS Devices

Service Requirements

Your device will require one of the following:

- Cellular connection supporting data transmission through your mobile service provider.
- WiFi connection with internet access.

Please refer to your device user guide or contact your mobile service provider for help in configuring your service.

Memory and Operating System (OS) Requirements

This is the amount of free space required to install the *NotifyLink* application. You will need additional memory to download and store messages and PIM items (calendar events, contacts and tasks).

Free Space for Installation	Supported OS
1.2 MB	Palm OS 5.0 or greater

Installation Checklist

Make sure your device is set up with an account on an on-demand or on-premise version of *NotifyLink Enterprise Server*. Verify this with your IT Administrator.

- Fully charge your battery before your begin.
- Do a full backup of the device.
- Make sure you are in a serviceable mobile phone area.
- Feel free to use synchronization software, such as Palm HotSync®, to download the *NotifyLink* application onto your device, **BUT...**
- **DO NOT** use other synchronization software to synchronize your Email and PIM once *NotifyLink* has been installed. *NotifyLink* will handle all Email and PIM synchronization.

Install NotifyLink

Over the Air (OTA) Installation

Follow these instructions to download and install the *NotifyLink* application to your device or to upgrade to the latest *NotifyLink* version.

1. From a web browser on the device, go to the following site:
<http://notifylink.notify.net/ota.asp>
2. Select the *Palm OS Based Devices* link.
3. When prompted, **Save** the file, *ninstall.prc* to your device.
4. Once download is complete, you will be prompted with the message: “Do you want to accept ‘ninstall’ into Applications?” Select **Yes** to accept this.
5. Open the **NotifyLink Install** application located on the device’s desktop.
6. Select **Install**. It may take a few minutes to install the *NotifyLink* files.
7. When the download and installation has completed, you will be prompted to **reset the device**. The *NotifyLink Install* icon will disappear after you reboot the device
Note: *NotifyLink* may not function correctly if you do not reset your device after the installation.
8. Once the installation is complete, use the *NotifyLink* icon to **register the device**. See [Register Your Device](#).




NotifyLink icons

Register Your Device

Registration identifies you as a valid user on the *NotifyLink Enterprise Server* and allows you to begin using *NotifyLink* to synchronize the Email and PIM (calendar events, contacts, and tasks) between your device and the mail/PIM server.

Registering the device consists of:

- Entering the **Email Address** from your account on the mail server
- Entering an **Authentication Password** provided by your IT Administrator
- Performing an initial PIM synchronization

1. Select the **NotifyLink icon**  from the Home screen.
2. Enter your **Email Address** and **Authentication Password** as they appear on the server.



NotifyLink Registration Screen

3. Select **Register**.
4. Once registration is complete, you will be prompted to check for registration messages. A welcome message is sent to the device *Inbox* and you are then prompted to perform the initial synchronization (OTA Load) for the device.
5. Select the PIM type(s) for which you are requesting an OTA Load.

Calendar

Contacts


Tasks

6. Select **Send**.

Set Your NotifyLink Preferences

Push Settings

Push Settings give you the ability to choose the method and frequency of synchronization with the *NotifyLink* server. There are separate settings for weekdays and weekends. Synchronization can be turned off, set for all day, or set for intervals.

1. Select the **NotifyLink icon** from the Home screen.
2. Select **Preferences** from the *Options* drop-down menu or the *Preferences* button. 
3. Select **Push** from the *Server* options.
4. Select the **Push Type**. Choose **Scheduled Push** or **Direct Push**.
5. Define the settings.

Scheduled Push Settings

Weekday Settings	Select: Off, Interval, or All Day Determines when the device will synchronize Mondays through Fridays.
Weekend Settings	Select: Off, Interval, or All Day Determine when the device will synchronize on Saturdays and Sundays.
Push Frequency	If you have set weekdays/weekends to <i>All Day</i> or <i>Interval</i> , type in the number of minutes between synchronizations (valid entry=1 to 90 minutes). Default is 5 minutes, resulting in the device synchronizing every 5 minutes.

Direct Push Settings

Weekday Settings	Select: Off, Interval, or All Day For <i>Interval</i> , choose the times you wish synchronization to start and end. Times must be within one 24-hour period. Defaults are 7:00 to 19:00, resulting in the device synchronizing from 7am to 7 pm.
Weekend Settings	Select: Off, Interval, or All Day Defaults are the same as for weekday.

Direct Push Timeout

Time limit for a direct push session. The time limit is determined by the shortest timeout in the network path. It is recommended that all timeouts in the network path match or exceed the direct push timeout. Default is 15 minutes.


Refresh Interval

Select *Advanced* to access this setting. This keeps the device's inactivity timer from closing the connection during the Direct Push session. The default is 3 minutes and should not be changed unless you are instructed to do so by a Notify Technical Support staff member.

6. Select **Save** from the menu.

Email Settings

The *Email Settings* tool gives you the ability to define how the device will process Email on your device.

1. Select the **NotifyLink icon** from the Home screen.
2. Select **Preferences** from the *Options* drop-down menu or the *Preferences* button. 
3. Select **Email** from the *Server* options.
4. Define the settings.

Email Settings

Notification Alert

Check to enable: Device will show a pop-up alert every time new Email or PIM data is received

Confirm Deletes

Check the box to enable: When you delete a message, the device will ask you to confirm the delete.

Sync Read

Yes: Messages you have read on the device will be marked as *Read* on the server.

No: Messages you have read on the device will NOT be marked as *Read* on the server.

Prompt: When you read a message on the device you will be prompted to mark it as *Read* on the server.

Sync Delete

Yes: Messages deleted on the device will be deleted on the server.

No: Messages deleted on the device will NOT be deleted on the server.

Prompt: When you delete a message on the device you will be prompted to delete it on the server.

Use Trash Folder

Check this box to send items to the *Trash* folder when they are deleted. Leave unchecked to permanently remove items from the device when they are deleted. Sent email and sent commands can also be affected by this setting (see *Track Sent* below).

Note: Automated *Cleanup Settings* are governed by this option as well. (Cleaned up email will bypass the trash folder when this option is

disabled.)

Track Sent

Determines whether sent Email/commands are tracked or deleted.

None: Sent Emails or sent Commands are placed in the Trash folder (if used – permanently deleted if not used).

Commands: Only sent Commands are placed in the Sent Items folder. Emails are sent to the Trash folder (if used – permanently deleted if not used).


Email: Only sent Email is placed in the Sent Items folder. Commands are sent to the Trash folder (if used – permanently deleted if not used).

All: Sent Emails *and* Commands are placed in the Sent Items folder.

5. Select **Save** from the menu.

PIM Settings

PIM Settings give you the ability to choose which type(s) of PIM items (calendar events, contacts, or tasks) you want synchronized to the server. Any additions or changes made on the device will be sent to the server if you have checked the box next to a PIM item type.

1. Select the **NotifyLink icon** from the Home screen.
2. Select **Preferences** from the *Options* drop-down menu or the *Preferences* button. 
3. Select **PIM** from the *Server* options.
4. Check the box beside the types of PIM items you want synchronized.


Option	Description
Sync Calendar	If checked, calendar additions/changes/deletions made on the device are synchronized to the server.
Sync Contacts	If checked, contact additions/changes/deletions made on the device are synchronized to the server.
Sync Tasks	If checked, task additions/changes/deletions made on the device are synchronized to the server.
PIM Change Summary	If checked, sends information to the device <i>Inbox</i> summarizing additions/changes/deletions downloaded from the server.

5. Select **Save** from the menu.

Cleanup Settings

The *Cleanup Settings* allow you to set conditions for *automatically* deleting old Email in your device *Inbox* and any custom folder you created on the server and had mirrored to the device.

- The cleanup routine deletes local Email only and does not affect Email on the server.
- Automated Email cleanup uses the trash folder only if the *Use Trash Folder* option is enabled in *Email Settings*. Otherwise, Email selected for cleanup is immediately and permanently deleted.
- If your device is in a low memory state, items selected for cleanup bypass the Trash folder and are immediately and permanently deleted.

1. Select the **NotifyLink icon** from the Home screen.
2. Select **Preferences** from the *Options* drop-down menu or the *Preferences* button. 
3. Select **Cleanup** from the *Server* options.
4. Check the box beside **Enable Cleanup** to perform automatic email cleanup. Leave unchecked to disable email cleanup.
5. If cleanup is enabled, choose the **Type** of email cleanup: Daily / Weekly / Monthly.

Type	Description
Daily	Keeps a day's worth of Email in the <i>Inbox</i> or custom folder. Automatic cleanup will occur daily for Email over one day old. (EX: Cleanup performed at 7 am on Tuesday deletes Email received prior to Monday 7 am.)
Weekly	Keeps a week's worth of Email in the <i>Inbox</i> or custom folder. Automatic cleanup will occur daily for Email over one week old. (EX: Cleanup performed at 7 am on Jan. 21 st deletes Email received prior to 7 am on Jan. 14 th .)
Monthly	Keeps a month's worth of Email in the <i>Inbox</i> or custom folder. Automatic cleanup will occur daily for Email over one month old. (EX: Cleanup performed at 7 am on May 9 th deletes Email received prior to 7am on April 9 th .)

6. If you want unread email included in the cleanup, check the box beside the **Cleanup unread messages** option.
7. If you want unacknowledged meeting invitations included in the cleanup, check the box beside the **Cleanup unacknowledged meetings** option.
8. In the **Next Cleanup Time** field, enter the time of day the device should run the email cleanup procedure.
9. Select **Save** from the menu.

Start Using Your Device

View the Message List

Selecting the *NotifyLink* icon from the device Home screen launches the *NotifyLink* application and displays the Mailbox Screen. Other Email folders can be accessed from the *Inbox* screen. The folder list contains native Email folders as well as custom folders you have created and set to be mirrored on the device.

To view Email folders available in addition to the *Inbox*, select the folder name currently displayed, then choose another folder from the list that displays.





View a Message / Retrieve an Attachment

To view a message, scroll through your message list to highlight the message you wish to see. Press the center jog dial to open the message.

To retrieve an attachment,

1. Open the message containing the attachment and from the *Message menu* choose **Attachments**.
2. Select the attachment you wish to download, and then click **Yes** to begin the download.
3. Once downloaded, view the attachment with an attachment file viewing application.

Send an Email Message

1. Select the **Compose** button at the bottom of the message list screen. 
2. Enter the **recipient's Email address**. To look up an address, use the down arrow. 
3. Enter the Email **subject**.
4. Type the **body** of the Email message.
5. To include an attachment, select the attachment button. 
6. From the button options, select **Send**. 

Add a Contact

From *Contacts* you may create a new contact or view and edit existing entries.

1. Select the *Contacts* icon from the Home screen
2. Select the **New Contact** button.
3. Enter the contact's name and personal information for any of the optional fields available.
4. Select **Details** to enter the *Contact Details* screen to add or edit *Category*, *Private status*, or *Note*.

NOTE: Be sure to choose a **Category** for the contact. Categories correspond to server address books. If a category is not chosen, the contact will be added into an "Unfiled" category and may not be where you expect it to be on the PIM server.

5. Select the **Done** button to save the entry.

Travel Tips

- If you have changed the time zone on your device when traveling, you should also change the time zone of your mail/PIM account on the server. You can do this from your device via the *NotifyLink* Mobile Web.

On Premise Users - In your device's web browser, enter the address of the web server running the HTTP/Web component of *NotifyLink*, followed by: */mobile/*
Login with the Email address and password of your mail account.

On Demand Users - In your device's web browser, enter the address of the web server:
`https://hosted#.notifylink.com/mobile/mobilelogin.php`
(#) = *Insert the server number to which you have been assigned.*
Log in with the Email address and password of your mail account.

- If you travel internationally, contact your carrier to inquire about the availability of international travel data plans. Such plans may reduce the cost of your usage while travelling outside the country.
- Apply more stringent security settings to your device when you travel. See [Security Tips](#).

Security Tips

- Install a mobile anti-virus product on your device.
- Make use of the security features described below. These features can be set from your device in the **NotifyLink Preferences**. (Note: Your security settings may be predetermined to meet the requirements of corporate security policies. Contact your administrator for more information.)

NotifyLink Lock Settings

Inactivity Timeout	Enter number of minutes before the device locks due to inactivity.
Challenge Timeout	Enter number of minutes before the device locks. This lock is initiated regardless of inactivity and is intended to challenge unauthorized use of the device if it is lost or stolen.

NotifyLink Password Settings

Password Strength	This determines the password's level of complexity and will assist you in consistently creating passwords that meet character pattern requirements.
Password Expiration	Enter the number of days (30-365) until a password expires.
Password History	Enter the number of passwords (10-100) to store. If the number of stored passwords is 10, you will not be able to use the past ten passwords.

NotifyLink Technical Support

Contact the *Notify Technology Corporation* technical support team at support@notifycorp.com

Or by phone at 330.702.3070

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