Quick Start Guide

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1. Introduction

Welcome to FilePoint!

FilePoint is a software application for Palm OS handheld users which lets you efficiently store, organize and access your important software programs, documents, spreadsheets, music, pictures, and other files on your handheld.

If you are familiar with using Windows Explorer on a desktop PC or laptop, you will find that FilePoint brings many of the same features and functionality to your Palm OS handheld, including folder organization, the ability to launch files and applications, access to folders and files on computers in your "Network Neighborhood", and integration with most popular software applications. In fact, after spending time with FilePoint, many Palm OS handheld users find they no longer use the old Palm icon screen and simply prefer to use FilePoint as their main Palm screen for quick access to their files, folders and programs.

FilePoint installs as a standard Palm application, and is compatible with all Palm OS compatible handhelds and smartphones, including the Tungsten, Zire, Treo and other models from PalmOne, Sony's Clie, and Alphasmart's Dana, as well as Palm OS compatibles from Kyocera, Samsung, Garmin, TapWave, and others.

FilePoint also comes in a more advanced Professional Edition which offers even more powerful organization tools for Palm OS handheld users through the use of the FilePoint Desktop, a PC-based application that lets you view and manage all the data on your PDA, from the convenience of your desktop computer. For handheld users who also wish to be able to print wirelessly from their handheld to printers using infrared, Bluetooth or network connections, Bachmann Utilities offers all of the capabilities of FilePoint Pro along with a full version of our popular PrintBoy Premium Edition printing software.

This Quick Start guide provides new FilePoint users with a set of simple steps to help you quickly and successfully setup and begin using FilePoint on your Palm OS handheld.

1.1 What's New in FilePoint Version 3.0

For those familiar with earlier versions of Filepoint, FilePoint version 3.0 expands on FilePoint's list of features as follows:

- Uses your handheld or smartphone's wireless network connection to access and copy files from office and home based network computers to your handheld's RAM or memory expansion card
- Native Windows Networking compatibility with workgroup and domain-based networks running Windows 2000, Windows XP, Windows NT and Windows 98
- Drive-letter mappings allow quick access to frequently accessed shared network folders
- Full folder views of your internal handheld memory and your expansion card
- Integration with Documents To Go and other 3rd party applications, enabling users to save files directly to the network via the "Send" menu
- Support for high-resolution screens
- Widescreen support for Alphasmart Dana
- Automatically recognizes and organizes new file types such as mp3, photo, PowerPoint, and "native" Word and Excel files.
- Launches .xls and .doc files directly into programs such as Documents To Go.

1.2 Where Can I Find More Information?

The best way to find out more information on FilePoint is to visit our web site at http://www.bachmannsoftware.com. There you will find helpful links for:

- Technical support
- Answers to frequently asked questions (FAQ)

- Information on connecting your handheld to your network with FilePoint
- Upgrade information Bachmann Utilities

For a more detailed installation guide which includes our standard End User Licensing Agreement as well as details on all of the features and functionality in FilePoint, please view or print the FilePoint Documentation included with this software.

1.3 How Will I Know If There are New or Enhanced Versions of FilePoint

Bachmann Software updates and enhances FilePoint regularly. In order to be automatically notified of these updates, **if you have not purchased** your copy of FilePoint from either the Bachmann Software store, Handango, PalmGear, or other on-line software download store, it is important that you register at http://www.bachmannsoftware.com/Register so we can update you on the latest versions including bug fixes and feature enhancements.

1.4 How to Contact Bachmann Software:

Voice: (973) 729-9427
Fax: (973) 729-8553
E-Mail: sales@bachmannsoftware.com
Or visit us on the World Wide Web: http://www.bachmannsoftware.com

For Technical Support please visit us on the Web for the most recent software updates, answers to Frequently Asked Questions, and instructions on how to contact us for support issues. Please note that due to the volume of inquiries, technical support is by e-mail only, via our online support form, at http://www.bachmannsoftware.com/fpsupport.htm.

To upgrade to our most full functioned printing and file management product, Bachmann Utilities, please visit http://www.bachmannsoftware.com

2. Installing FilePoint on Your Handheld

2.1 Pre-Installation Checklist

To install and use FilePoint you need the following:

- A Palm OS compatible handheld
- A Personal Computer, Hotsync cradle and a "Zip" software program (for example, WinZip or Pkzip) – to download PrintBoy onto your PDA – (a downloadable version of WinZip is available at http://www.winzip.com)

To take full advantage of FilePoint's powerful **Memory Expansion Card** features, you will also need a Memory Expansion Card. If you do not already have such a card, they are inexpensive and cards in various storage capacities from 8 megabytes to 256 megabytes or even larger may be found at most office supply, electronics or other stores where Palm OS handhelds and accessories are sold. Most Palm OS compatible handhelds accept the standard SD or MMC card format. Sony Clie handhelds require Sony's Memory Stick (MS) format.

To take advantage of FilePoint's wireless networking features, you will need a Palm OS handheld that can connect to standard TCP/IP networks. Many handhelds are now available with built-in wireless connectivity including:

- PalmOne's Tungsten C, which has a built in Wi-Fi networking feature which can connect to your network via a Wi-Fi access point
- PalmOne's Tungsten T series, which has a built-in Bluetooth feature that can be used for networking with Bluetooth-enabled PC's and access point
- PalmOne's Treo smartphone which can connect to the internet using a cellular data connection, and which can be networked securely using a variety of 3rd party secure networking "VPN" software solutions
- Alphasmart's Dana Wireless, which has a built in Wi-Fi networking feature
- Sony's Clie series, several models which have built-in Wi-Fi or Bluetooth radios

In addition to these models with built-in connectivity, there are several add-on cards, cases and other accessories which can add networking functionality to existing handhelds. Visit our web site http://www.bachmannsoftware.com for the latest information on network-capable add-ons which you can use with FilePoint.

Also please note that new handheld models are regularly introduced by these and other handheld manufacturers – check regularly with your favorite handheld manufacturer for news on the latest handheld models and networking accessories.

2.2 Installation

If you use a Windows PC, you can install FilePoint on your handheld by running our easy-to-use Setup program:

1. Click on the Download link below for the Windows Installer
2. Choose "Save to disk"
3. Choose a location on your computer where you wish to save the FilePoint installer.
4. After downloading, locate the file "FilePointSetup.exe". Run FilePointSetup.exe, and follow the step-by-step instructions on the installation screens. Make sure your hotsync cradle is connected to your PC and your Palm OS Handheld is in the cradle.
5. Perform a HotSync to transfer FilePoint to your Palm OS handheld.
6. On your Palm handheld, tap the FilePoint icon to begin using FilePoint!

If you have an Apple Macintosh based desktop computer follow these instructions:

1. Click on the Download link below for the Mac-compatible .sit file
2. Choose "Save to disk"
3. Choose a location on your computer where you wish to save the FilePoint file

4. After downloading, locate and uncompress the file "FilePoint.sit"
5. After uncompressing, add the FilePoint prc and pdb files to the Palm Install tool. Place your Palm handheld in the HotSync cradle and press the HotSync button. After HotSync completes, FilePoint will be installed on your handheld.
6. On your Palm handheld, tap the FilePoint icon to begin using FilePoint!

Please use the following link to download the latest version of FilePoint:

www.bachmannsoftware.com/downloads.htm

2.3 Registering Your Software

If you already purchased the software, to key in your registration code tap on the Menu icon on your palm screen, and choose the Options menu, then tap on the Register submenu. On the Register screen, carefully enter your Registration Code when prompted. If you downloaded our software and have not purchased it yet, your trial version is FREE for 30 days upon installation.

3. Running FilePoint on Your Handheld for the First Time

If this is the first time you are running FilePoint on your handheld, there are a few things that will help you quickly get up and running with the program.

3.1 Scanning and Auto-Categorizing Your Handheld Files

The first time you run FilePoint, the software will let you know that it will need to do a one-time full scan of the files on your handheld so that it can categorize them for you. When you tap OK, FilePoint will first do a scan of all of the files in your handhelds main memory (commonly known as RAM). FilePoint will then determine if there are any Memory Expansion Cards installed in your handheld's expansion slots (some handhelds actually have more than one expansion slot). If there are any inserted cards, FilePoint will also perform a full scan of all files it finds on those cards.

On most handhelds, the initial scan of RAM and your expansion cards will take just a few seconds, after which you will be greeted with the main FilePoint screen.

3.2 Getting to Know the FilePoint Main Screen

The FilePoint main screen lets you browse folders, files, and programs that you have stored on your main handheld memory (RAM), and your expansion cards. If you are connected to your office or home network and have a wireless connection, this screen will also let you browse the computers on your network, and attach to and browse PC files that are stored in shared network drives on those computers. Figure 1 shows a typical FilePoint screen:

Figure 1: The main FilePoint screen, in Split View

The main FilePoint screen initially defaults to a folder view of your local handheld, and displays a list of folders it has built for you (left side of the screen), as well as a list of the software applications that it has found on your handheld (right side of the screen). If you do not have an inserted expansion memory card, all of these files will be on your handhelds RAM storage. If you do have an inserted expansion memory card, FilePoint will automatically detect most file types such as applications, documents, mp3 and photos, and show them on the FilePoint main screen as well.

At this point you can do a variety of things, including:

- Launch one of your Palm applications, such as Calculator, by selecting it and tapping the Open icon
- Browse for other files on your handheld, either by navigating through the folders that FilePoint built for you, or you can use FilePoint's Fast Find dropdown list above the folder tree to filter the current view and show you all of your Documents, Memos, Music, Pictures or other files.
- Organize your favorite programs, documents, music and other files by assigning them to folders of your own choosing
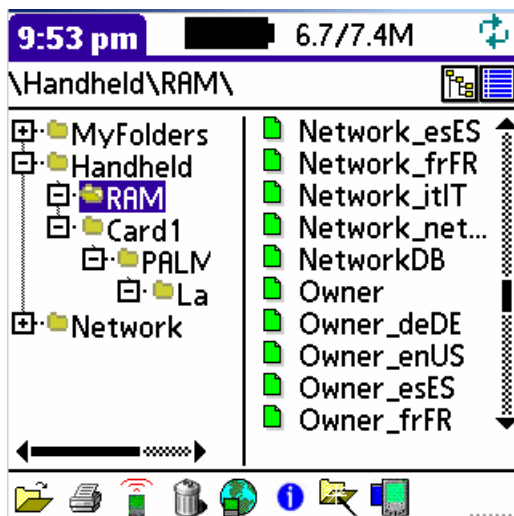
For a full description of all of the features you can use in FilePoint's main view with local folders and files, please refer to the main FilePoint Documentation.

3.3 Viewing Your RAM and Expansion Card Memory

Section 3.2 introduced you to the main FilePoint screen and a view of FilePoint folders containing your applications, documents and other files. In this section you will see that you can not only use the FilePoint folder system and the Fast Find feature to browse the contents of your handheld, but you can also use the "Handheld" feature to drill down and inspect the physical contents of your RAM or expansion memory card.

Why would you want to do this? Although the FilePoint folder and FastFind filing system is designed to make it easy for you to find and work with your programs and other files, in some situations you may find that you need to browse directly into your expansion memory card to locate a particular file. For example, some people use Card Readers attached to their personal computers which allow them to move files from their desktop computer or laptop directly to expansion memory cards. Users of these card readers typically become familiar with, and even create, their own custom folders directly on the card. In another example, people who share their expansion cards with other portable devices such as digital cameras, camcorders or MP3 playing devices, may need to become familiar with the specific folder locations on the expansion card where these devices place files (a good example is the DCIM folder structure used by most digital cameras).
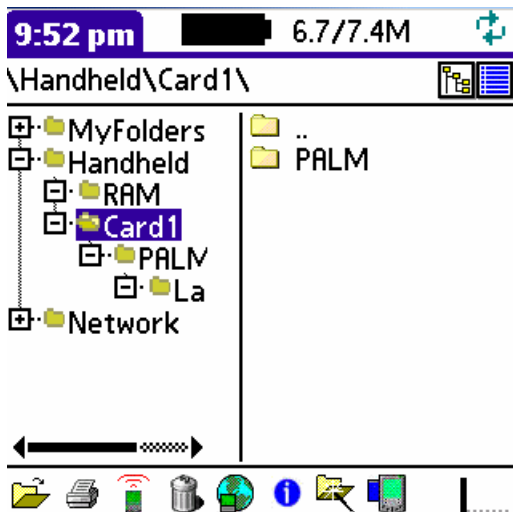
If you fall into one of these categories, or if you are by nature simply curious about what the physical contents of your handheld and expansion card are, you can use FilePoint to browse both RAM and your memory cards. To do this, tap on the small box next to the "My Folders" node in the folder panel of the main screen to close the FilePoint folder system. Directly below the My Folders node you will now see two additional nodes: Handheld and Network. Tap on the Handheld node to begin browsing the physical storage contents of your handheld, then tap on the RAM sub-folder to view the contents of your handhelds RAM storage (See Figure 2 below).

This screen shows an alphabetical listing of all of the files in RAM storage on your handheld. If you scroll up and down the list you will find the names of some familiar programs (such as Address Book) as well as some mysteriously named files. If you are curious, you can learn a lot about the contents of your handheld and the files installed by 3rd party applications by browsing these files.

WARNING: please exercise caution when manipulating the files in this view! Deleting or moving a file may cause one of your handheld applications to not run properly. In some cases you may even accidentally delete and lose valuable data. **Always** be sure you have a good backup of your handheld's contents by synchronizing your handheld frequently and by maintaining backup copies of applications and other files that you have loaded on your handheld!

If you have an expansion memory card, you can likewise explore its contents by tapping on the Card1 node on the left. You should now see a set of physical folders on your card, similar to Figure 3 below:

The main difference between browsing RAM and browsing a card is that files on expansion cards are organized in folders, whereas files on RAM are always stored on one big list. You can navigate this folder structure by tapping on the folder tree on the left, or by tapping on subfolders listed at the top of the file panel on the right.

As with the My Folders Folder view, in the Card1 view you can:

- Launch one of your Palm applications that is stored on the card (these are typically found under the /PALM folder), by selecting it and tapping the Open icon
- Browse for other files on the card. These are typically stored in a subfolder under the /PALM folder that is specific to the Palm application and file type. See your applications user manual for information on where it stores its files on expansion cards.

As with browsing your handheld's RAM file listing, you should exercise a great deal of caution before deleting or moving files in this view that you are not sure about. Doing so can cause 3rd party applications to no longer function correctly, or they may no longer be able to find the files you have moved. If you are not sure, it is always best to use this view simply for viewing and browsing. It is safest to allow FilePoint and your 3rd party applications to manage the storage location of your files.

3.4 Accessing Windows Networks With FilePoint

FilePoint version 3.0 lets users of selected wireless Palm OS handhelds connect to office and home-based computer networks and copy files to and from their handhelds. FilePoint is compatible with both informal peer to peer "workgroups"
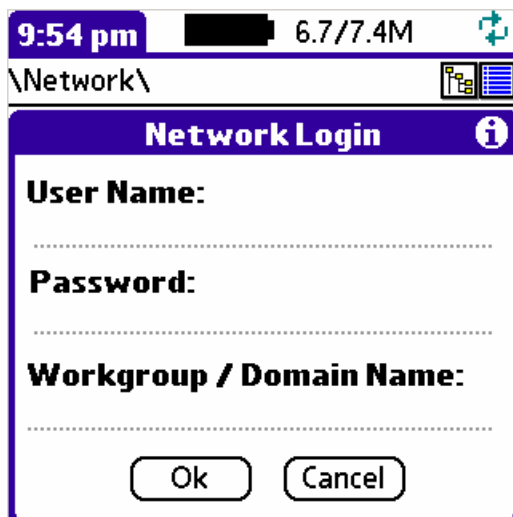
running Windows 98, NT, 2000 or XP, as well as server-based "Domains" running Windows NT server 4.0, 2000 and 2003 editions.

For Wi-Fi enabled Palm OS handhelds such as PalmOne's Tungsten C, connecting to your Windows network is as easy as logging into your network from your desktop computer or laptop. All you need to do is supply a user name and password that is valid for your workgroup or domain (if you are unsure about what user name you should use, please consult with your network administrator).

(Note: for non Tungsten C owners, depending on your handheld model and network configuration, you may need to enter additional network configuration information that will successfully register your handheld on a Windows network, including server names and/or IP addresses. Again, it is always best to consult with your network administrator if you are unsure about this information)

To connect to your network and browse network computers, folders and files, go to the FilePoint main screen, close any open folders in the My Folders or Handheld tree nodes, and tap the bottom-most item in the tree panel called "Network". When you tap this item, you will be automatically prompted for your login name and password, as well as the name of the workgroup or domain you wish to log in to (see Figure 4 below):

After filling in the required information, tap the Ok button and FilePoint will attempt to connect to the network. If successful, you will be greeted with a listing of computers FilePoint found on the network (see figure 5 below). If the connection was not successful, check your username and password and try again. If you cannot successfully log in, you may need to enter additional network connection information in FilePoint's Network Configuration screen (for more information on this screen and other network connectivity issues, please consult the chapter on Networking in the full FilePoint User Documentation)

At this point, accessing files and folders on a given computer works the same as it does on Windows' "Network Neighborhood": Tap on the computer you wish to browse, and choose from the list of available "shares" associated with folders on that computer. When you have selected a share, the folders and files in that share will appear on the right side of the FilePoint main screen. As with the local FilePoint views, you can navigate within the network folder tree by tapping on the subfolders at the top of the folder listing.

In the Network view, you can even create mapped drives just as in Windows. For example you may find it convenient to create a mapped drive "S:" as a shortcut to your company's shared documents folder on the server. Your mapped drives appear below the "Network" node in FilePoint's main screen, and can provide fast access to your familiar network locations.

Once you have found the files and folders that interest you, you can now select one or more files to copy from the network to your handheld. To select files for copying either tap on the name of file, or if you wish to copy more than one file at a time, tap the checkbox next to each file you wish to copy. To begin the copy, tap the Network Copy icon from the toolbar at the bottom of your screen.

Most users will find it easiest to let FilePoint automatically determine where on your handheld to store the copied files, based in the type of files being copied and the applications that you use on your handheld. In this case all you need to do is confirm the FilePoint folder to assign the files to (by default this will be "Recently Imported Files"), and a preference for storing the files on your handheld's main memory vs. your expansion card. After you have made your selections, FilePoint will offer to automatically navigate to the target folder, at which point you may work locally with your files.

If at some point after working with the copied files on your handheld, you wish to copy your changes back to the original network files, simply choose the files to be copied back, and tap the Network Copy icon. You will be asked to navigate to the network location where you wish to copy the files to, and upon confirming, the files will be copied back out to the network.

4. Exploring More of FilePoint: Where to Go Next

In this Quick Start guide we have touched upon some of the main features most users will typically use often with FilePoint. Now that you have seen some of the basics, there are a wealth of additional features and functionality that you can begin to take advantage of in FilePoint!

Feel free to "explore" FilePoint's various views, buttons, and menu options on your own and discover these features, or you may find it more convenience at this point to move on to the full FilePoint User Documentation to learn about all of the FilePoint features in more detail. The User Documentation provides more detail on the topics covered in the Quick Start guide, and in addition provides information on the following FilePoint features:

- Creating custom FilePoint folders
- Organizing your files in FilePoint Folders
- Managing file storage locations in RAM vs. Expansion Memory
- Creating new Documents
- Beaming Files to other handhelds
- Printing documents and other files with PrintBoy
- File Properties
- Using FilePoint as your Palm Launcher
- Configuring Network Connections

4. Troubleshooting

If you run into problems or have any questions, your best option is to visit the FilePoint Support page at http://www.bachmannsoftware.com/fpsupport.htm. There you will find the latest information on program updates, common problems and solutions, and links to frequently-asked-questions (FAQ's).

If you still cannot find the problem, you can submit a support inquiry by using the available Support Form. Please be sure to fill out all of the requested information including your handheld model, card information, type and a detailed description of the error you are encountering. Although response time can vary based on volume of support inquiries, typically you will see a response within 1-2 business days.

Please fill out the support form at http://www.bachmannsoftware.com/fpsupform.htm

If you have had success and have not purchased PrintBoy, why not purchase it right now? Our online store is safe and secure, just click on the Buy button at http://www.bachmannsoftware.com/filepoint.htm