

Ultrasoft® DataShield

For Palm™ Powered Handheld Computers

Version 1.2

User's Guide

Revision A

Ultrasoft DataShield

Copyright © 2002, 2003 Ultrasoft Limited

All Rights Reserved.

DataShield is a trademark and Ultrasoft is a registered trademark of Ultrasoft Limited. Palm OS, HotSync, and Graffiti are registered trademarks, and Palm is a trademark of Palm, Inc. All other trademarks are the property of their respective companies.

The information in this document is subject to change without notice. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Ultrasoft Limited.

Contents

Getting Started	5
Introduction.....	5
Starting Ultrasoft DataShield.....	5
Setting a Password.....	6
Steps for Using DataShield.....	7
Menu Commands.....	8
Getting Help.....	8
 Managing Your Data	 9
Overview.....	9
Viewing Your Data.....	9
Viewing, Creating and Editing Data Records.....	12
Searching Data Records.....	14
Editing the Record Details.....	15
Using Categories.....	17
Scheduling and Using Reminders.....	18
 Using Templates	 23
Overview.....	23
Viewing Templates.....	23
Creating and Editing Templates.....	24
Editing Template Details.....	25
 Data Security	 27
Overview.....	27
Security Preferences.....	27
Changing Your Password.....	29
Locking DataShield.....	30
 Helpful Hints and Troubleshooting	 31
Frequently Asked Questions.....	31

Getting Help.....	34
Index	35

Getting Started

Introduction

Ultrasoft® DataShield lets you organize and store your important information conveniently and securely on your Palm OS® handheld computer. And DataShield doesn't just store and protect your information — it helps you manage it.

- **Convenient** — Store birthdays, policy numbers and membership details. Attach notes and schedule reminders to let you know when things need attention.
- **Secure** — Store account numbers, PINs and passwords. DataShield uses military-strength encryption to keep your information safe in its password-protected database.
- **Flexible** — Use the built-in templates to organize your data, or create your own templates. Select your own security settings to give you the right balance of convenience and protection.
- **Simple** — You don't need to be a database programmer to configure DataShield just the way you want it. You can start entering your data within seconds.

Starting Ultrasoft DataShield



To open Ultrasoft DataShield on your handheld computer, tap the Ultrasoft DataShield icon in the applications screen.

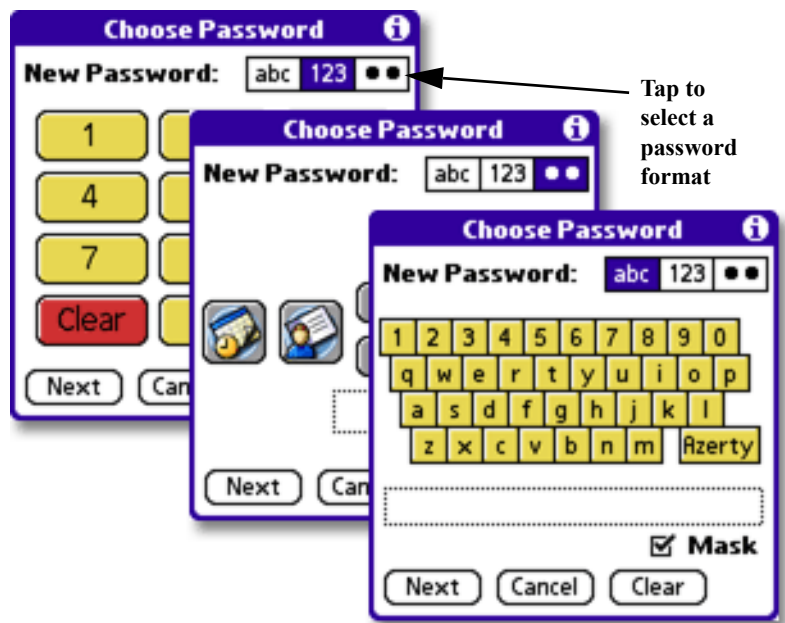
The first time you open DataShield, it will ask you to set a password, then it will display the Record View. You can immediately begin entering your data.

Setting a Password

A password is used to protect your data. You can configure DataShield so that you must enter the password to access the program. See [“Data Security” on page 27](#).

IMPORTANT: Do not forget your password. It cannot be recovered. See [“Changing Your Password” on page 29](#).

When you assign or change your password, you can choose from three available formats — alpha-numeric, digits-only or PIN.



- The alpha-numeric format allows you to enter a password consisting of letters and digits, using Graffiti® or by tapping on the keyboard buttons.
- The digits-only format is designed to allow you to enter a password by tapping the buttons on the number pad using a fingertip.
- With the PIN format, you enter a secret code sequence using the buttons on your Palm OS device's casing, or by tapping the icons on the screen.

If you use the alpha-numeric format, your password must be between four and sixteen characters in length. If you use the digits-only or PIN format,

it must be between four and six characters in length. A longer password provides a higher degree of security.

Steps for Using DataShield

[Step 1: Getting Ultrasoft DataShield on Your Device](#)

[Step 2: Entering Your Data](#)

[Step 3: Using Ultrasoft DataShield](#)

[Step 4: Backing Up Your Data](#)

Step 1: Getting Ultrasoft DataShield on Your Device

Windows users: download and run the Ultrasoft DataShield setup program on your desktop computer. The setup program will allow you to select the optional template and icon databases. When the setup program is finished, synchronize your Palm OS® handheld computer to install the software.

NOTE: The optional template and icon databases are a good starting point for setting up DataShield, and are highly recommended. **Do not install them if you are upgrading or re-installing DataShield** - they will overwrite your own data. For more information on upgrading, see [“How do I upgrade Ultrasoft DataShield?” on page 33](#).

Mac and other users: download Ultrasoft DataShield in a ZIP or SIT package, then un-zip or un-stuff the software and see the Read Me file for instructions.

Step 2: Entering Your Data

After installing Ultrasoft DataShield you can immediately begin entering your important data using the provided templates. To get started, see [“Viewing, Creating and Editing Data Records” on page 12](#).

You may also want to create your own templates, or modify the provided ones. See [“Creating and Editing Templates” on page 24](#).

Step 3: Using Ultrasoft DataShield

Ultrasoft DataShield allows you to:

- Create and edit data records
- View your data
- Control the level of data security
- Schedule reminders when items need attention
- Backup your data to your desktop computer

Step 4: Backing Up Your Data

Any changes to your Ultrasoft DataShield data will be automatically backed up to your desktop system whenever you synchronize.

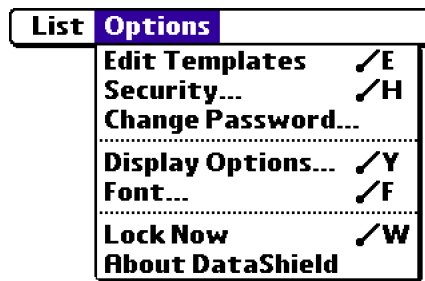
IMPORTANT: Be sure that your system backup conduit is enabled.

Windows Users: see the *System* conduit in the HotSync® Manager's list of conduits. It should be set to *Handheld overwrites desktop*.

Macintosh Users: check that your *Backup* conduit is enabled.

Menu Commands

Ultrasoft DataShield provides several commands that are available via the menu. To access the menu, tap the menu icon in the silk-screen area of your Palm OS® handheld's screen, to the left of the Graffiti® area.



On handheld devices running Palm OS® 3.5 or later, you can also access the menu by tapping on the screen's title bar.

Getting Help

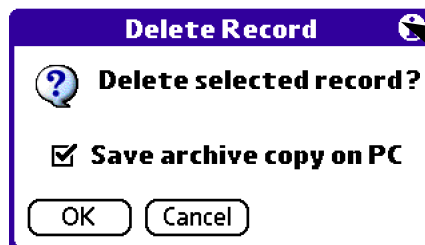
In addition to this User's Guide, DataShield includes built-in tips.

Using Tips

While you are using Ultrasoft DataShield you can get more information by tapping the information icon.



Information icon



To view the tips for the current dialog, tap the information icon.

Managing Your Data

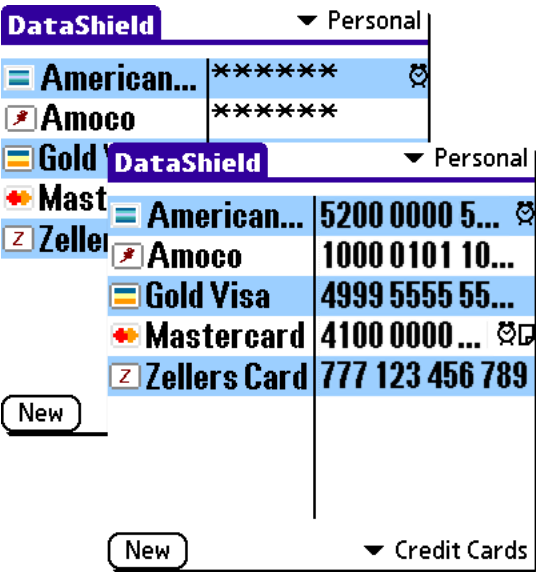
Overview

The Record List View displays a list of data records stored in Ultrasoft DataShield. Use this view to manage your data.

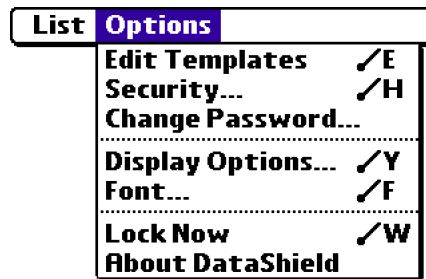
Viewing Your Data

The Record List View

The Record List View displays your data records. You can choose to have DataShield either display or mask your encrypted data in the list.



To customize the display of the Record List View, open the menu, and select the **Display Options** or **Font** commands. See [“Customizing the Record List View” on page 11](#).



To have DataShield display more lines of data in the list, change the font to a smaller size. For increased readability, change it to a larger size.

You can filter the list by template type and by category.

- To change the template filter, tap the type name located at the bottom right corner of the screen and choose a template from the pop-up list. See [“Using Templates” on page 23](#).
- To change the category, tap the category name located in the upper right corner of the screen, and choose a category from the drop-down list. See [“Using Categories” on page 17](#).

Data records that are marked *Private* can be hidden or masked in the list. See [“Editing the Record Details” on page 15](#).

Scroll the list using the up and down arrows located in the lower right corner of the screen, or using the scroll bar if you’ve enabled it. See [“Customizing the Record List View” on page 11](#).

You can also scroll the list using the up and down buttons on your Palm Powered handheld’s casing.

Use the **Top** and **Bottom** menu options to jump to the top or bottom of the list.

To create a new record, tap the **New** button. See [“Creating or Editing a Data Record” on page 13](#).

Tap a data record in the list to open the Record View screen and display its details. From the Record View screen, you can duplicate, edit or delete the record. See [“Viewing a Data Record” on page 12](#).

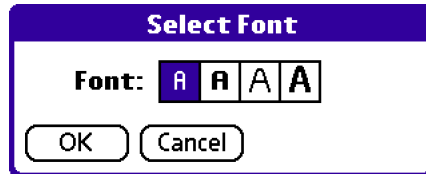
If the list displays a note or reminder icon for a record, you can tap it to jump directly to the note or reminder dialog.

Customizing the Record List View

To customize the display of the Record List View, open the menu, and select **Font** or **Display Options**.

Changing the Font

To change the font used in the Record List View list, select the **Font** choice from the Record List View menu.

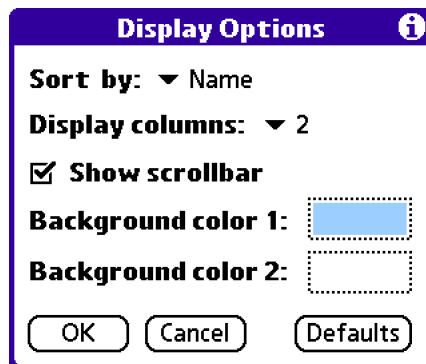


To have DataShield display more lines of data in the list, change the font to a smaller size. For increased readability, change it to a larger size.

NOTE: If your Palm Powered handheld supports other fonts, they will be included in the **Select Font** dialog choices.

Choosing Display Options

To change the Record List View display options, select **Display Options** from the Record List View menu.



- Tap the **Sort By** drop-down arrow and select the sort order for the list:
 - **Type**
 - **Name**
 - **Order Entered**
 - **Last Accessed**
- Tap the **Display columns** drop-down arrow and choose the number of columns to be displayed in the main list.

- Check the **Show Scrollbar** option to enable the scroll bar in the Record List View, instead of the scroll arrows.
- Tap the **Background Color** selectors to choose colors for alternating lines in the Record List View.

Viewing, Creating and Editing Data Records

Ultrasoft DataShield lets you view, create and edit data records using the Record List View.

Viewing a Data Record

Tap on a data record in the Record List View to display its details. The Record View screen is shown.

The screenshot shows a mobile application interface for viewing a record. At the top, there is a purple header bar with the text "Record View" in white and "Personal" in black. Below the header, the record title "Gold Visa" is displayed in a yellow bar. To the right of the title is a small icon of a card. Below the title, the following details are listed: Card #: 4999 5555 5555 1234, Exp. Date: 11/2004, PIN: 1234, Bank: First National Bank, Contact: Marty McGee, and Phone: (333) 555-1234. Below these details is a yellow bar with the word "Reminder" in black. Under the reminder bar, the text "Sun 3/30/03 12:00 pm" and "Call Marty about credit limit" is displayed. At the bottom of the screen, there are three buttons: "Done", "Edit", and "New".

The record is displayed using the color specified in its *Record Color* setting, with the icon specified in its *Record Icon* setting. See [“Editing the Record Details” on page 15](#).

If the record has a scheduled reminder, the reminder details are displayed. If it has a note attached, the note is also displayed.

Tap the **New** button to create a new record. Tap the **Edit** button, or anywhere in the record details to edit the currently-selected record. See [“Creating or Editing a Data Record” on page 13](#).

The Record View provides menu commands to:

- Delete the record
- Duplicate the record
- Attach or delete a note
- Jump to the top or bottom of the Record View
- Change the Record View font

If the record display takes more than one screen, scroll the display using the up and down arrows located in the lower right corner of the screen, or using the up and down buttons on your Palm Powered handheld's casing.

Creating or Editing a Data Record

To create a new record, tap the **New** button in either the Record List View or the Record View.

To duplicate a record, tap on its name in the Record List View to display the Record View, then select the **Duplicate Record** menu command.

Duplicating and modifying an existing record can be a quick way to create a new record.

To edit an existing record, tap on the record in the Record List View to display the Record View, then tap the **Edit** button. When you edit or modify a record, the new information replaces the previous information.

When you create or edit a record, the Record Edit View is displayed.

Record Edit Unfiled

Type: ▼ Calling Cards

Description: AT&T Card

PIN: 9199

Access #: 800-555-1212

Done Details... Note

TIP #1: Use the next field graffiti stroke to move quickly around the screen. It's a down-up motion with the stylus.

TIP #2: If you've already begun to enter data, you can select a different template without losing your entries.

When you create a new record, its fields and default settings are based on the currently-selected or last-used template. See [“Using Templates” on page 23](#).

Tap the **Type** drop-down list and choose a different template to change the record's template. When you select a different template, the record's field values are re-mapped to the new template.

Enter data values into the appropriate fields using Graffiti®, the built-in Palm OS® keyboard, or an external keyboard device.

NOTE: When you create or modify a record, its fields are encrypted based on their corresponding setting in the template. See [“Using Templates” on page 23](#).

Tap the category selector in the upper-right corner of the screen to choose a category for the record. Categories are used to filter the record in the Record List View. See [“Using Categories” on page 17](#).

The screenshot shows the 'Record Edit' screen. At the top, there is a purple header with the text 'Record Edit'. Below it, the 'Type' is set to 'Calling'. The 'Description' is 'AT&T Ca', the 'PIN' is '9199', and the 'Access #' is '800-555'. A dropdown menu is open, showing a list of categories: 'Business', 'Family', 'Palm', 'Personal', 'QuickList', 'Unfiled' (which is highlighted in purple), and 'Edit Categories...'. At the bottom of the screen, there are three buttons: 'Done', 'Details...', and 'Note'.

The Record Edit View provides menu commands to:

- Delete the record
- Duplicate the record
- Attach or delete a note
- Cut, copy, paste and select field entries, or undo the last field operation
- Change the Record Edit View font

If the record display takes more than one screen, scroll the display using the up and down arrows located in the lower right corner of the screen, or using the up and down buttons on your Palm Powered handheld's casing.

Tap the **Details** button to edit the record details or the reminder schedule. See [“Editing the Record Details” on page 15](#)

Tap the **Note** button to attach a note to the record. Use a note to store any information that doesn't belong in a field, or to make special notes about the record.

Tap the **Done** button to save the record.

Searching Data Records

If the Ultrasoft DataShield application is running, you can search its data records using the built-in Palm OS® *Find* function. To use this function, tap the *Find* icon in your device's silk-screen area, and enter a string.

You can disable searching, or restrict it to unencrypted fields only in the DataShield Security preferences. See [“Global Find Options” on page 29](#).

TIP: When setting up your own templates, make sure that only fields containing private information are encrypted, and when you input data, be sure to enter private information only into encrypted fields.

The *Find* function will not search records that are not marked *Searchable*. Records that are marked *Private*, are either shown, masked or hidden, based on your Palm OS security preferences. See “Editing the Record Details” below.

If the DataShield application is locked, the *Find* function is restricted as follows:

- Only unencrypted fields are searchable. Encrypted data cannot be searched while the program is locked.
- When you tap the *Go To* button in the Find dialog, you will be prompted to enter your DataShield password.

See [“Locking DataShield” on page 30](#).

Editing the Record Details

To open the Record Details View for a record, tap the **Details** button in the Record Edit View.

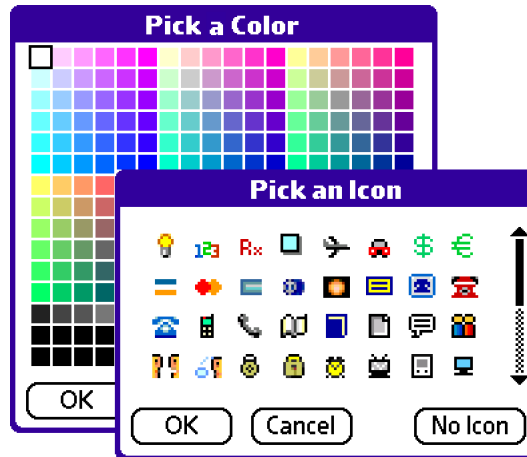
The image shows a 'Record Details' dialog box with a purple title bar and a white background. At the top, there are two tabs: 'Details' (selected) and 'Reminder'. Below the tabs, the 'Show in List' dropdown is set to 'PIN'. The 'Category' dropdown is set to 'Unfiled'. There is a 'Color' field with a yellow color swatch and a dotted border. Below that is an 'Icon' field with a dotted square. The 'Searchable' checkbox is checked, and the 'Private' checkbox is unchecked. At the bottom, there are four buttons: 'OK', 'Cancel', 'Delete...', and 'Note'.

The Record Details View includes a pair of selectors at the top of the screen.

- **Details** lets you modify the record details
- **Reminder** lets you set or adjust the record reminder schedule. See [“Scheduling and Using Reminders” on page 18](#).

Default values for the record details and reminder schedule are inherited from the record’s template. See [“Using Templates” on page 23](#).

- Tap the **Show in List** drop-down arrow and select a field to be displayed in the second column of the Record List View. The record's first field (usually the *Description* field) is always displayed in the first column.
- Tap the **Category** drop-down arrow and select a category for the record. See [“Using Categories” on page 17](#).
- Tap the **Color** and **Icon** selectors to choose a color and icon for the Record View display. See [“Viewing a Data Record” on page 12](#).



*Some icons courtesy of
Pimlico Software and/or
twokidsinagarage.com.*

NOTE: To use the color selector, your handheld computer must be running Palm OS® 3.5 or later.

- Check the **Searchable** option to make the record searchable using the Palm OS® *Find* function. See [“Searching Data Records” on page 14](#).
- Check the **Private** option to mark the record as private. Use the Security panel in the Palm OS® *Prefs* application to specify whether private records should be shown, hidden or masked. See the User's Guide that came with your Palm Powered device for more information.

Tap the **Delete** button to delete the record, or tap **Note** to attach or edit its note. Use a note to store any information that doesn't belong in a field, or to make special notes about the record.

Tap the **OK** button to save the record details, or tap **Cancel** to discard your changes.

Using Categories

Categories are used to filter records in the Record List View. See [“The Record List View” on page 9](#).

To create, rename or delete a category, tap the category name located in the upper right corner of the screen in the Record List View, and choose “*Edit categories*” from the list.



To add a category, tap the **New** button, and enter the name of the category.

To rename a category, select it in the list, tap the **Rename** button, and enter the new name.

To delete a category, select it in the list and tap the **Delete** button.

NOTE: When you delete a category the records in that category are moved to the *Unfiled* category.

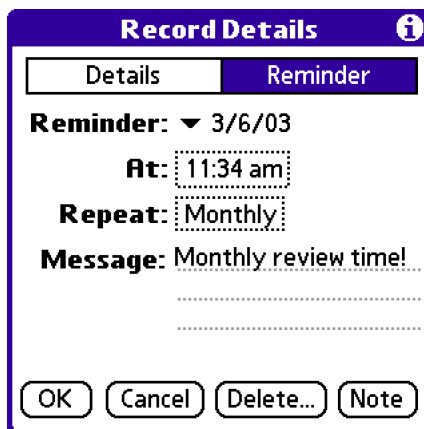
Scheduling and Using Reminders

Ultrasoft DataShield lets you schedule reminders to let you know when your data items need attention.

When you create a new record, its reminder schedule is preset to the schedule specified in its template. See [“Using Templates” on page 23](#).

Scheduling or Changing a Reminder

To schedule a reminder for a record, open the Record Details View, tap the **Details** button in the Record Edit View, and tap the **Reminder** selector. See [“Creating or Editing a Data Record” on page 13](#) and [“Editing the Record Details” on page 15](#).



The image shows a 'Record Details' dialog box with a purple header and a white body. The header has the title 'Record Details' and an information icon. Below the header are two tabs: 'Details' and 'Reminder'. The 'Reminder' tab is selected. The dialog contains the following fields: 'Reminder:' with a dropdown arrow and the value '3/6/03'; 'At:' with a time selection field showing '11:34 am'; 'Repeat:' with a dropdown arrow and the value 'Monthly'; and 'Message:' with a text field containing 'Monthly review time!'. At the bottom are four buttons: 'OK', 'Cancel', 'Delete...', and 'Note'.

- Tap the **Reminder** drop-down arrow and select a date for the reminder. To cancel the records reminder, choose *No Alarm*.

- Tap the **At** trigger and select a time for the reminder.

Choose Reminder Date

◀ 2003 ▶

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

S M T W T F S

1
2 3 4 5 6 7 8
9 10 11 12 13 14 15

Choose Reminder Time

11 : 3 4 ◀ ▶ AM PM

OK Cancel

- Tap the **Repeat** trigger to open the Repeat Settings dialog and specify a repeating reminder schedule for the record.

Set Reminder ⓘ

None Day **Week** Month Year

Every: 1 **Week(s)**

Repeat on: S M T W T F S

Every week on Mon, Wed, and Fri

OK Cancel

- Enter a reminder message in the **Message** field. This message will be displayed when the reminder is due.

Tap **OK** to save the reminder settings, or tap **Cancel** to discard your changes.

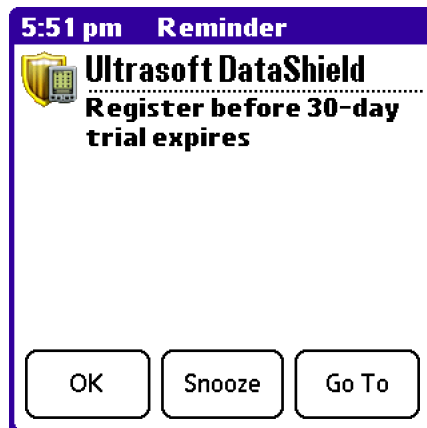
Canceling a Reminder

To cancel a reminder, simply edit the record's reminder schedule and change its next reminder date to *No Alarm*. See [“Scheduling or Changing a Reminder” on page 18](#).

Responding to a Reminder

When a reminder is due, Ultrasoft DataShield displays an alert and sounds an alarm.

If your handheld computer is running Palm OS® version 4.0 or later, and a single reminder is due, the Attention Manager displays a reminder.

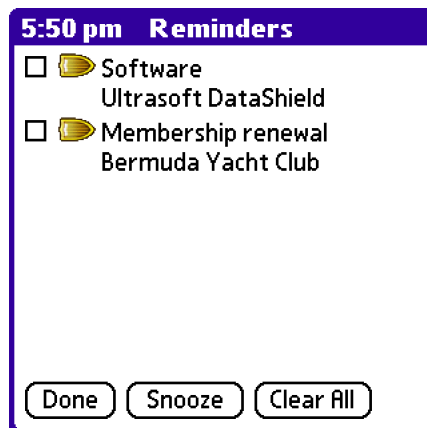


Tap the **OK** button to clear the reminder and dismiss the dialog.

Tap the **Snooze** button to be reminded again later.

Tap the **Go To** button to launch Ultrasoft DataShield and view the data record.

If your handheld computer is running Palm OS® version 4.0 or later, and multiple reminders are due, the Attention Manager displays a list:



Tap the **Done** button to dismiss the dialog. You can re-display it by tapping the flashing asterisk in the upper-left corner of the screen.

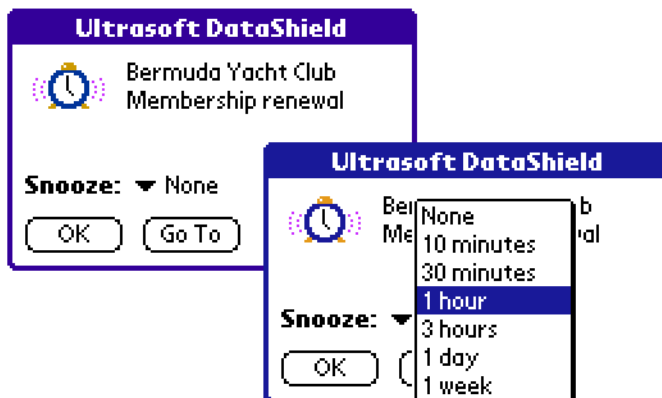
Tap the **Snooze** button to be reminded again later.

Tap the **Clear All** button to clear all the reminders in the list.

Tap the checkbox next to a reminder to remove it from the list and clear its reminder.

Tap the text of the reminder in the list to launch Ultrasoft DataShield and view the data.

If your handheld computer is running a version of Palm OS® prior to 4.0, and one or more reminders are due, Ultrasoft DataShield displays its own reminder dialog.



Select a time interval from the **Snooze** pop-up menu to be reminded again later, or select **None** to clear the reminder.

Tap the **OK** button to dismiss the dialog.

Tap the **Go To** button to launch Ultrasoft DataShield and display the Record List View.

Using Templates

Overview

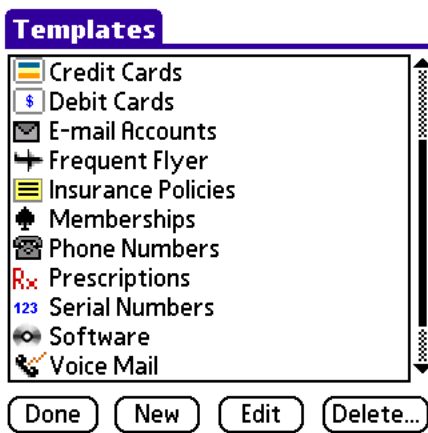
Ultrasoft DataShield uses templates as a basis for data records. When you create a new record, its fields, default settings and reminder schedule are based on the currently-selected or last-used template. See [“Creating or Editing a Data Record” on page 13](#). In addition, the Record List View can be filtered by template. See [“Viewing Your Data” on page 9](#).

DataShield comes with a library of templates. It is highly recommended that you install this library as a starting point for your own templates.

Viewing Templates

To access the Templates View, open the menu in the Record List View and select the **Edit Templates** command.

The Templates View shows a list of available templates.



To create a new template, tap the **New** button.

To edit a template, double-tap on its name in the list, or tap on its name in the list and then tap the **Edit** button.

To duplicate a template, tap on its name in the list, then open the menu and select the **Duplicate Template** menu command. Duplicating and modifying an existing template can be a quick way to create new templates.

To delete a template, tap on its name in the list and then tap the **Delete** button.

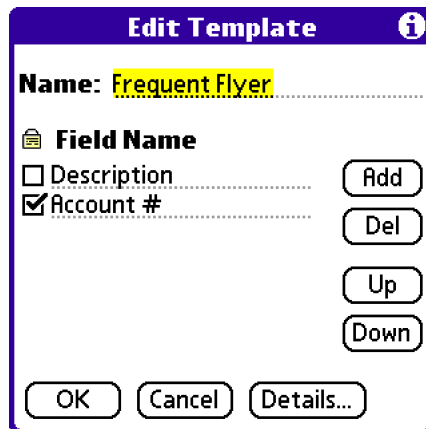
NOTE: You cannot delete a template that is used by data records. You must delete or reassign the data records first.

If the templates list fills more than one screen, you can scroll the list using the scroll bar or the buttons on the organizer's casing. Use the **Go to Top** and **Go to Bottom** menu options to jump to the top or bottom of the list.

Creating and Editing Templates

To create a new template, tap the **New** button in the Templates View, or use the **Duplicate Template** menu command. To edit an existing template, double-tap on its name in the Templates View list, or tap its name and tap the **Edit** button. See [“Viewing Templates” on page 23](#).

When you create or edit a template, the Edit Template View is displayed.



- Enter the name of the template in the **Name** field.

NOTE: Template names must be unique.

- Tap the **Add** button and enter a field name to add a new field.

- Tap the checkbox next to a field name to select whether or not data for that field is encrypted in the DataShield database.

NOTE: Unencrypted data appears as plain text to anyone who might obtain a copy of your DataShield database. **Be sure to encrypt any fields that might contain private information.**

- Select a field and tap the **Delete** button to remove the field. When you tap the **OK** button, the field will be removed from corresponding data records.
- Select a field and tap the **Up** or **Down** button to change the order of the field in the list.

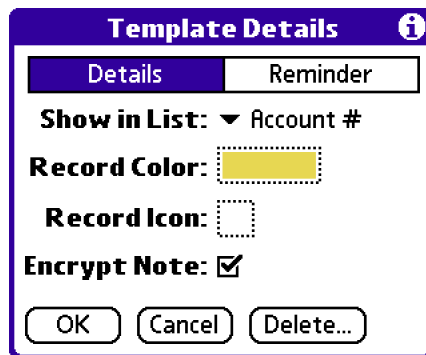
NOTE: When you reorder the fields in a template, the fields in related data records are also reordered.

Tap the **Details** button to edit the template details or the default reminder schedule. See “Editing Template Details” below.

Tap the **OK** button to save or update the template, or tap the **Cancel** button to discard your changes.

Editing Template Details

To open the Template Details View for a template, tap the **Details** button in the Template Edit View.



The Template Details View includes a pair of selectors at the top of the screen.

- **Details** lets you modify the template details.
- **Reminder** lets you set or adjust the default reminder schedule.

The values you specify for the template details and reminder schedule are inherited by records that you create from the template.

Template Details

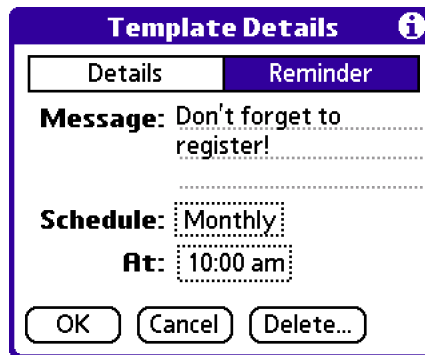
- Tap the **Show in List** drop-down arrow and select a field to be displayed in the second column of the Record List View. The record's first field (usually the *Description* field) is always displayed in the first column.
- Tap the **Color** and **Icon** selectors to choose a default color and icon for the Record View display for records based on the template.
- Check the **Encrypt Note** option to encrypt notes attached to records based on the template.

Tap the **Delete** button to delete the template.

Tap the **OK** button to save the template details, or tap **Cancel** to discard your changes.

Default Reminder Schedule

Tap the **Reminder** selector to set or change the default reminder schedule for the template.

The image shows a screenshot of the 'Template Details' dialog box with the 'Reminder' tab selected. The dialog has a purple header with the title 'Template Details' and an information icon. Below the header are two tabs: 'Details' and 'Reminder', with 'Reminder' being the active tab. The 'Message' field contains the text 'Don't forget to register!'. The 'Schedule' field is set to 'Monthly' and the 'At' field is set to '10:00 am'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Delete...'.

Template Details ⓘ

Details **Reminder**

Message: Don't forget to register!

Schedule: Monthly

At: 10:00 am

OK Cancel Delete...

- Enter a reminder message in the **Message** field. This message will be displayed when a reminder is due for records based on the template.
- Tap the **Schedule** trigger to open the Repeat Settings dialog and specify a repeating reminder schedule for the template. To cancel the schedule, choose *None* in the Reminder Schedule dialog. See [“Scheduling or Changing a Reminder” on page 18](#).
- Tap the **At** trigger and select a time for the reminder.

Tap the **Delete** button to delete the template.

Tap **OK** to save the reminder settings, or tap **Cancel** to discard your changes.

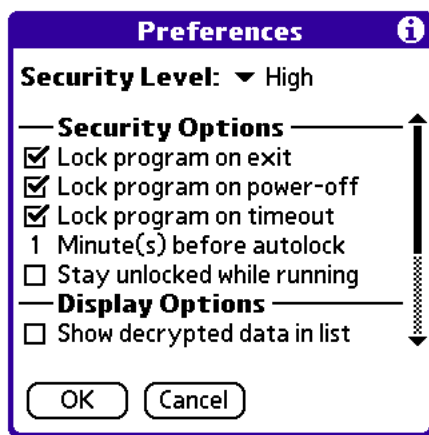
Data Security

Overview

Information that you enter into DataShield is stored in a password-protected database. You assign a password when you first run DataShield, and when you lock the program, nobody can access your encrypted data without your password — not even the software engineers at Ultrasoft. You can select security settings to lock DataShield automatically. Choose the security level that gives you the right balance of convenience and protection.

Security Preferences

To access the Security Preferences screen, open the menu in the Record List View and select the **Security** command.



DataShield has three pre-defined security levels: *high*, *medium* and *low*. Or you can select your own options in the security preferences screen to create a custom security level.

- **High:** DataShield will use the highest security settings to protect your data. This also means that you will be required to enter your password each time you access the program.
- **Medium:** The program will select security settings that attempt to give the best balance of security and convenience to most people.
- **Low:** DataShield will use lower security settings. You will have to enter your password only infrequently, but your data will not be as well protected.
- **Custom:** Select this option by choosing your own individual security settings.

Security Options

The Security Options group provides settings for automatically locking DataShield.

- **Lock program on exit:** DataShield will automatically lock when you exit the program.

NOTE: when DataShield is locked, you must re-enter your password to access the program.

- **Lock program on power-off:** DataShield will lock when you power off your Palm OS® handheld, or when it automatically powers off due to a system timeout.
- **Lock program on timeout:** DataShield will lock after a timeout period. This provides additional security when you have the *Stay on in cradle* setting enabled on your Palm OS® handheld.

NOTE: timeout occurs when there has been no activity on your device for the specified period.

- **Stay unlocked while running:** Allows you to leave DataShield unlocked until you exit the program, after which the power-off and timeout settings will be used to automatically lock the program.

Display Options

- **Show decrypted data in list:** With this option enabled, DataShield will decrypt and display encrypted data in the Record List View. Otherwise, it will mask encrypted data in the list. See [“Viewing Your Data” on page 9](#).
- **Show decrypted in preview:** With this option enabled, DataShield will decrypt and display encrypted data in the Record View. See [“Viewing a Data Record” on page 12](#).

- **Tap preview to edit record:** With this option enabled, tapping anywhere on the screen in the Record View will open the Record Edit view. See [“Creating or Editing a Data Record” on page 13](#).

Global Find Options

The Global Find Options group provides settings for controlling how DataShield responds to the built-in Palm OS® *Find* function. See [“Searching Data Records” on page 14](#).

- **Enable Global Find:** With this option enabled, DataShield will allow the Palm OS® *Find* function to search its data.

NOTE: With this option enabled, the Palm OS® *Find* function will search only records that are marked *Searchable*. See [“Editing the Record Details” on page 15](#).

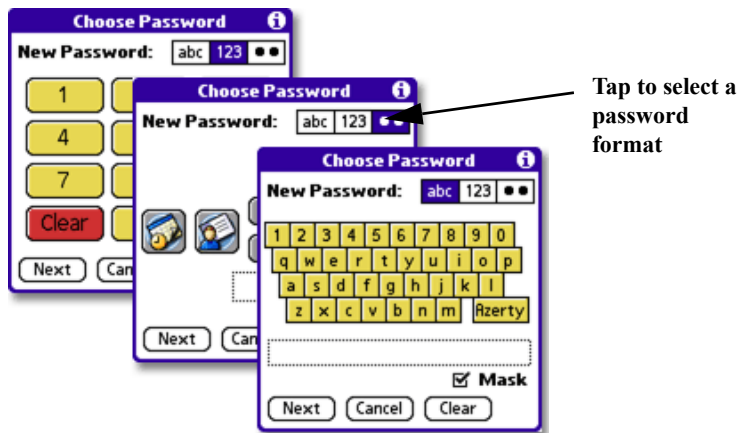
- **Search encrypted fields:** The program will allow the Palm OS® *Find* function to search its encrypted fields when it is unlocked.

Record Options

- **Create searchable records:** With this option enabled, new records will automatically have their *Searchable* attribute enabled. See [“Editing the Record Details” on page 15](#).

Changing Your Password

The first time you run Ultrasoft DataShield, it requires that you assign a password.



You can change your password at any time by tapping the title bar in the Record List View, and choosing the **Change Password** command from the **Options** menu.

When you change your password, you can choose from three available formats — alpha-numeric, digits-only or PIN.

- The alpha-numeric format allows you to enter a password consisting of letters and digits, using Graffiti® or by tapping on the keyboard buttons.
- The digits-only format is designed to allow you to enter a password by tapping the buttons on the number pad using a fingertip.
- With the PIN format, you enter a secret code sequence using the buttons on your Palm OS device's casing, or by tapping the icons on the screen.

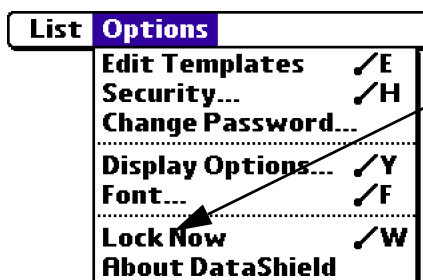
If you use the alpha-numeric format, your password must be between four and sixteen characters in length. If you use the digits-only or PIN format, it must be between four and six characters in length. A longer password provides a higher degree of security.

IMPORTANT: If you lose your password, it cannot be removed or recovered. **Record your password in a safe place.**

Locking DataShield

Ultrasoft DataShield will lock automatically based on your security preferences.

You can lock DataShield at any time by opening the menu in the Record List View, and choosing the **Lock Now** command from the **Options** menu, or by using the **W** menu shortcut. DataShield will lock immediately.



Use the *Lock Now* menu command to lock DataShield immediately.

When DataShield is locked, you must re-enter your password to access the program.

Helpful Hints and Troubleshooting

Frequently Asked Questions

This chapter contains a selection of Frequently Asked Questions. For the answers to more questions, or to get online assistance, please visit the Ultrasoft DataShield support Web site at <http://support.ultrasoft.com/>.

- [System Requirements](#)
- [Program Limits](#)
- [How do I register Ultrasoft DataShield?](#)
- [How do I upgrade Ultrasoft DataShield?](#)
- [What should I do if I forget my password?](#)
- [What if I lose my registration code?](#)

System Requirements

Ultrasoft DataShield requires Palm OS® 3.0 or later.

DataShield has been successfully tested on a wide range of Palm OS handheld computers.

You should have at least 400KB of available memory on your Palm OS® handheld computer before installing Ultrasoft DataShield. You should HotSync often.

The User's Guide was created using Adobe Acrobat 5.0, and can be viewed with Acrobat Reader 4.0 or later. Visit www.adobe.com for a free copy of Acrobat Reader.

Program Limits

The number of records and templates supported by Ultrasoft DataShield is limited only by the available memory on your Palm OS® handheld.

How do I register Ultrasoft DataShield?

You can purchase an Ultrasoft DataShield registration code at the web site where you downloaded the software, or at <http://www.ultrasoft.com>. You will be asked to provide your HotSync ID.

To locate your HotSync ID, start the HotSync application on your Palm OS® handheld device, and look in the upper-right corner of the screen.



Your registration code is on your HotSync ID, so that your licensed copy of DataShield will run only on your Palm OS® handheld computer.

When you have obtained your registration code, enter it in the **About** screen of the DataShield application on your Palm OS® device.



You can access the **About** screen using the DataShield menu. See [“Menu Commands” on page 8](#).

How do I upgrade Ultrasoft DataShield?

Before you install an upgrade to your Ultrasoft DataShield software, synchronize your Palm OS handheld computer to back up your data.

1. Locate the DataShield databases in your Palm Desktop backup folder.
2. Copy the databases to a safe place. If anything goes wrong with the upgrade, you will need them.
3. Install the new version of Ultrasoft DataShield. **DO NOT** install the sample databases.
4. Synchronize your Palm OS® handheld to install the DataShield program handheld device.

NOTE: If you’re using an older Palm OS® handheld device, and your security settings are such that DataShield is left unlocked while not running, you may need to manually lock the program before installing an update. See [“Security Preferences” on page 27](#) and [“Locking DataShield” on page 30](#).

5. Start Ultrasoft DataShield and review your data.

What should I do if I forget my password?

Ultrasoft DataShield is designed to be secure. If you lose your password, it cannot be recovered or removed. Your only option will be to delete and reinstall DataShield, and re-create your data.

What if I lose my registration code?

Visit the Ultrasoft secure Web server at <http://secure.ultrasoft.com/> to retrieve it. You’ll need your registered email address to access the server.

Getting Help

Technical Support

If you cannot find the answer to your question in the online help or this user's guide, you can get help from several other sources including the Frequently Asked Questions, using a database search, submitting your question to other users, and sending an e-mail to Ultrasoft support.

Frequently Asked Questions

If you have difficulty with Ultrasoft DataShield, please take a look at the Frequently Asked Questions page at the Ultrasoft DataShield Web site:

<http://support.ultrasoft.com/>

Search for Help

You can look for your answer in our up-to-date solution database, where we store all questions and answers. If you are unable to find the answer using the database, post a question online and we'll help you personally.

Chat

For the fastest response, chat with Ultrasoft support and other Ultrasoft DataShield users, by visiting:

[news://news.ultrasoft.com/ultrasoft.datashield](http://news.ultrasoft.com/ultrasoft.datashield)

or:

<http://support.ultrasoft.com/forum>

Email Support

If you send email to support@ultrasoft.com, our support robot will read your email, and suggest solutions.

Please include the following information in your email message:

- A clear description of the problem you've encountered
- Any error messages you've seen
- Ultrasoft DataShield version
- Handheld computer type, Palm OS version, and HotSync version
- A list of other programs you have installed on your organizer
- Desktop OS version (e.g. Windows ME, Mac OS 9, Linux)

If the automatic response does not answer your question, please click the link near the bottom of the message to let us know.

Index

A

about screen [32](#)

B

backing up [8](#)
backup conduit [8](#)

C

categories [14](#), [17](#)
color [11](#), [26](#), [35](#)

D

data
 deleting [16](#)
 editing [13](#)
 encrypted [9](#)
 entering [13](#)
 masked [9](#)
 viewing [12](#)
Display columns [11](#)
display options [11](#)

E

encrypt notes [26](#)
encryption [13](#), [25](#), [26](#), [28](#)

F

filtering
 by category [10](#)
 by template [10](#)
find [14](#), [16](#), [29](#)
font [11](#), [12](#)

H

help [8](#), [34](#)
HotSync ID [32](#)

I

icon [26](#), [35](#)
installing [7](#)

L

lock program
 on exit [28](#)
 on power-off [28](#)
 on timeout [28](#)
locking [30](#)
lost password [33](#)

M

menu commands [8](#)

N

notes [14](#), [26](#)

P

- password
 - changing [29](#)
 - length [30](#)
 - lost [33](#)
 - setting [6](#)
- preferences [27](#)
- private records [10](#), [16](#)
- program limits [32](#)

R

- registering [32](#)
- registration code [32](#), [33](#)
- reminders
 - cancelling [19](#)
 - changing [18](#)
 - responding to [20](#)
 - scheduling [18](#)

S

- searching [14](#), [16](#), [29](#)
- security preferences
 - display options [28](#)
 - record options [29](#)
 - security options [28](#)
- sort order [11](#)
- starting DataShield [5](#)
- system requirements [32](#)

T

- technical support [34](#)
- templates
 - creating [24](#)
 - default reminder [26](#)
 - deleting [25](#)
 - details [25](#)
 - editing [24](#)
 - viewing [23](#)
- tips [8](#)

U

- upgrading [33](#)

V

- viewing data [9](#)

viewing templates [23](#)