

# **Ultrasoft<sup>®</sup> DataShield**

For Microsoft<sup>®</sup> Windows<sup>®</sup>

**Version 1.3**

## **User's Guide**

Revision A

*Ultrasoft DataShield*

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# Getting Started

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## Introduction

Ultrasoft® DataShield lets you organize and store your important information conveniently and securely on your Microsoft® Windows® computer and synchronize it with your Palm OS® handheld computer, so you can access your data when you need it, wherever you are.

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 on your handheld 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.

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## Starting Ultrasoft DataShield



To open Ultrasoft DataShield on your Windows computer, click the Windows *Start* button, then choose *Programs* and *Ultrasoft DataShield*.

The first time you open DataShield, it may ask if you want to create a new database and/or set a password. It will then display the Record View and you can immediately begin entering your data.

If you plan to synchronize DataShield with your Palm OS® handheld, see [“Steps for Using DataShield” on page 6](#) before you run the desktop program.

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## Setting a Password

A password is used to protect your data. You must enter the password to access DataShield on your Windows computer.

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**IMPORTANT:** Do not forget your password. It cannot be recovered. See [“Changing Your Password” on page 31](#).

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You can use the same DataShield password on your Windows computer and on your Palm OS handheld. DataShield can be configured to keep your password synchronized on the two platforms. See [“HotSync Options” on page 35](#).

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## Steps for Using DataShield

[Step 1: Installing Ultrasoft DataShield](#)

[Step 2: Entering Your Data](#)

[Step 3: Using Ultrasoft DataShield](#)

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

### Step 1: Installing Ultrasoft DataShield

Download and run the Ultrasoft DataShield setup program on your desktop computer. The setup program will install DataShield on your computer and on your Palm OS® handheld computer.

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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. **The synchronization process will create linked databases that will be used to share information between your PC and your handheld.**

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### 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 [“Creating and Editing Data Records” on page 14](#).

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

You can enter data either on your PC or on your handheld. When you synchronize, your entries will appear on both platforms. See [“Synchronization” on page 33](#).

### 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 on your handheld when items need attention
- Backup your data to your desktop computer

### Step 4: Backing Up Your Data

Any changes to your Ultrasoft DataShield data on your handheld are automatically backed up to your desktop system whenever you synchronize.

To back up the DataShield database on your desktop, use the Backup menu command. See [“Backing Up Your Data” on page 20](#).

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## Getting Help

You can access this User’s Guide from within DataShield for Windows by selecting the Help menu option, or pressing the F1 key.

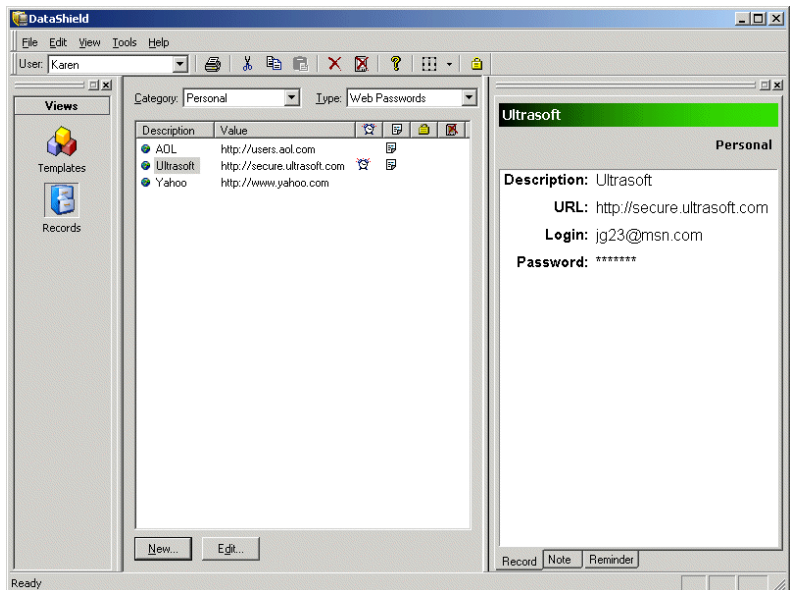
Additional help is available on-line. See [“Getting Help” on page 39](#).



# Managing Your Data

## Overview

The Ultrasoft DataShield window includes several panes.



- The **toolbar** is displayed beneath the menu, and contains buttons for frequently used menu commands.
- The **shortcut bar** is initially displayed at the left side of the window, and displays shortcuts to the Template and Record list views.
- The **list view pane** in the middle shows the Template or Record list.
- The **preview pane** displays data for the selected template or record.
- The **status bar** at the bottom of the screen displays status messages

The toolbar also contains the HotSync User selector. If your computer hosts several HotSync users, you can choose the HotSync ID from this drop-down list.

## Arranging the Window Layout

The toolbar, shortcut bar and preview pane can be moved, resized, hidden, dragged away from the main DataShield window and left to float on their own, or docked at any edge of the main DataShield window.

Use the **View** menu commands to hide or show the toolbar, status bar, shortcut bar and preview pane, or to select the Template or Record view. By default, DataShield memorizes window placement and pane selection. To disable this feature, or to further customize the window layout, toolbar contents, keyboard shortcuts or other workspace attributes, use the **Customize** command in the **Tools** menu.

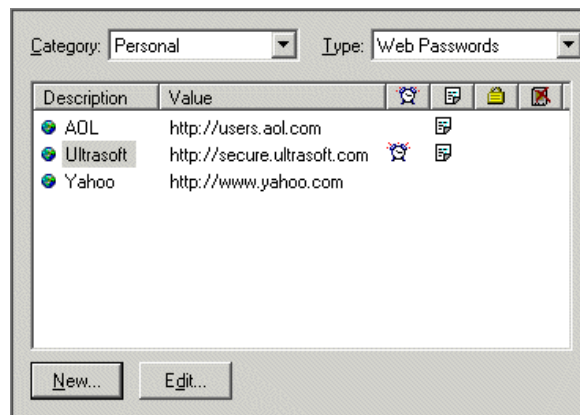
To reset the workspace layout to its “factory default”, use the **Reset Workspace** command in the **Tools** menu.

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## Viewing Your Data

### The Record View

The Record View displays your data records. You can choose to have DataShield either display or mask your encrypted data in the list. See [“Security Preferences” on page 29](#).



To access the Record View, click the *Records* icon in the shortcut pane, or select **Records** from the **View** menu.

The list displays each record’s *description* field, its designated display value, and icons to indicate if the record has an associated alarm or note, and if it’s marked *Private* or *Archived*.

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Data records that are marked *Private* can be hidden or masked in the list using the **Private Record** options in the **View** menu. See [“Record Details” on page 15](#). Records that are marked *Archived* are not synchronized with your Palm OS handheld, and can be exported and removed using the **Archive** command in the **File** menu. See [“Record Details” on page 15](#) and [“Archiving Records” on page 20](#).

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To customize the display of the Record View, use the **Preferences** command in the **Tools** menu.

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

- To change the template filter, click the type name located at the upper right of the pane and choose a template from the pop-up list. See [“Using Templates” on page 23](#).
- To change the category, click the category name located in the upper left of the pane, and choose a category from the drop-down list. See [“Using Categories” on page 19](#).

To create a new record, click the **New** button. See [“Creating and Editing Data Records” on page 14](#).

To edit a record, double-click on its name in the list, or select the record and click the **Edit** button.

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With the preview pane enabled, select a record in the list to display its details in the preview pane. From the Record Preview pane, you can drag/drop fields to other programs such as Internet Explorer.

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To delete a record, select it and click the **Delete** toolbar button, or right-click the mouse on its name and choose the **Delete** command from the pop-up menu.

You can also select a record and use the main menu, pop-up menu, toolbar or keyboard shortcuts to cut, copy, paste, archive or print it.

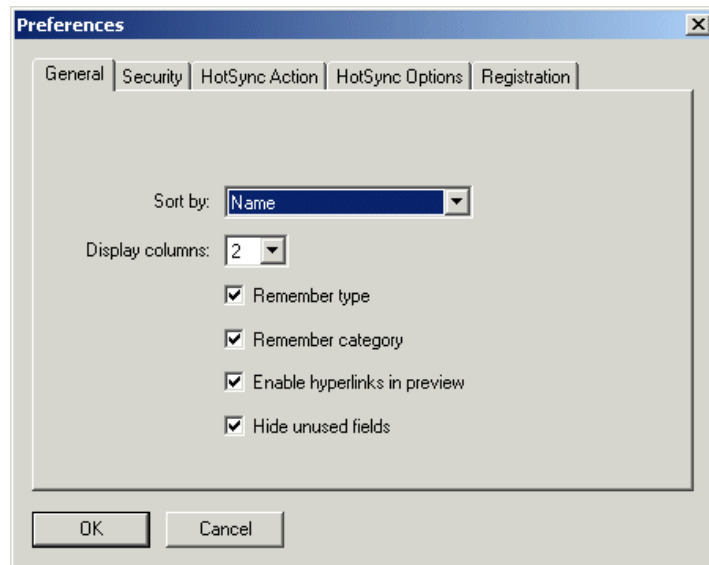
---

Keyboard shortcuts are displayed in the menus. Mnemonics for buttons and other controls are indicated by an underlined character in the button or other caption. *Windows XP users*: press the *Alt* key on your keyboard to highlight shortcut mnemonics.

---

## Customizing the Record View

To customize the display of the Record View, open the **Preferences** dialog via the **Tools** menu and select the **General** tab.



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The **Preferences** dialog also includes tabs that let you select security settings (see [“Security Preferences”](#) on page 29), configure your synchronization options (see [“Setting the Synchronization Properties”](#) on page 34), and input your DataShield registration code (see [“How do I register Ultrasoft DataShield?”](#) on page 38) .

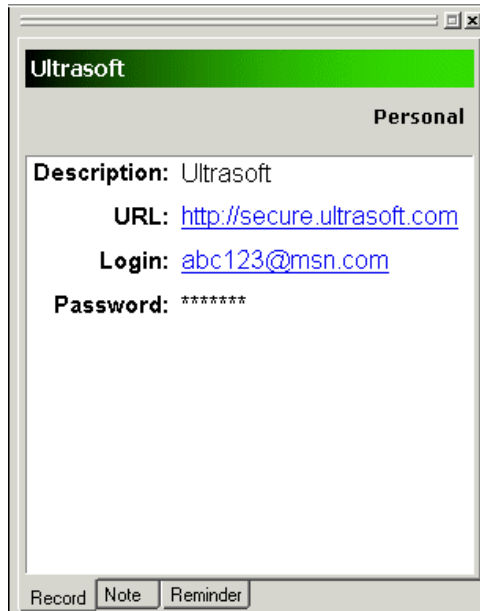
---

- Click the **Sort by** drop-down arrow and select the sort order for the list:
  - **Type**
  - **Name**
  - **Order Entered**
- Click the **Display columns** drop-down arrow and choose the number of columns to be displayed in the main list.
- Check the **Remember type** and **Remember category** options to have DataShield memorize the type and category selections for the Record List view.
- Check the **Enable hyperlinks in preview** option to enable clickable hyperlinks in the Record Preview. See [“Viewing a Data Record”](#) on page 13.

- Check the **Hide unused fields** option to hide unused fields in the Record View. Only fields that contain data will be displayed. See “[Viewing a Data Record](#)” on page 13.

## Viewing a Data Record

Click on a data record in the Record View to display its details in the preview pane. The Record preview pane is illustrated below.



The record name is displayed over the color specified in its *Record Color* setting. See “[Record Details](#)” on page 15.

If the clickable hyperlinks option is enabled (see “[Customizing the Record View](#)” on page 12), hyperlinks values are shown in blue and underlined. You can click on the text to jump to the hyperlink.

If the record has a scheduled reminder, the reminder details are displayed on the Reminder tab. If it has a note attached, the note is displayed on the Note tab.

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To copy a value to an input field in another program such as Internet Explorer, click your left mouse button on the field and drag it to the other program’s window, and release the button. *The other program must support drag/drop operations.*

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## Creating and Editing Data Records

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

To create a new record, click the **New** button in the Record View.

To duplicate a record, click on its name in the Record List View and use the **Copy** and **Paste** menu commands. Duplicating and modifying an existing record can be a quick way to create a new record.

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

### Record Data Values

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



The screenshot shows a window titled "Edit Record" with a green header bar containing the "Ultrasoft" logo. Below the header, there is a "Type:" label followed by a dropdown menu currently showing "Web Passwords". Underneath are four text input fields: "Description:" with the value "Ultrasoft", "URL:" with "http://secure.ultrasoft.com", "Login:" with "jg23@msn.com", and "Password:". At the bottom of the window, there is a row of buttons: "Record", "Details", "Note", and "Reminder". Below these are two larger buttons: "OK" and "Cancel".

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

---

**TIP:** If you plan to create several new records, select the category and template in the List View first. When you click the **New** button, the category and template will be pre-selected, and the cursor will appear in the *Description* field ready for you to start typing.

---

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

Click 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 the keyboard or highlight text in another program that supports drag/drop (such as the Palm Desktop application), and drag it to the input fields using your mouse.

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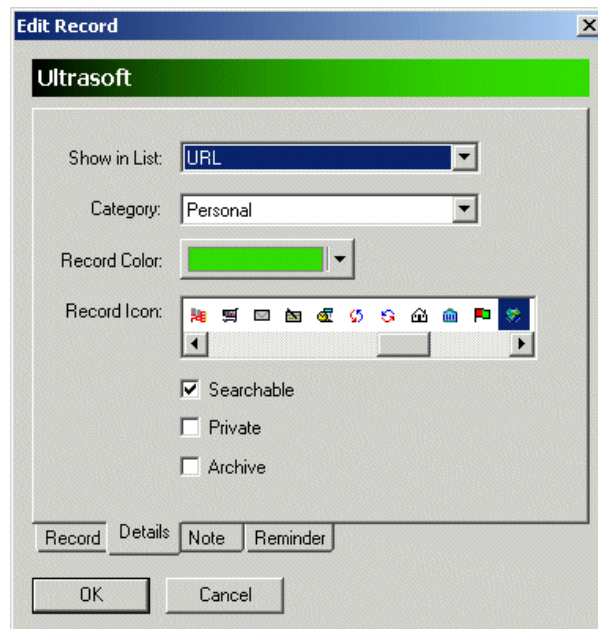
**NOTE:** When you create or modify a record, its fields are encrypted based on their corresponding setting in the template. See [“Using Templates” on page 23](#).

---

Click **OK** to save the record, or **Cancel** to discard your changes.

## Record Details

Click the **Details** tab to view the record details.



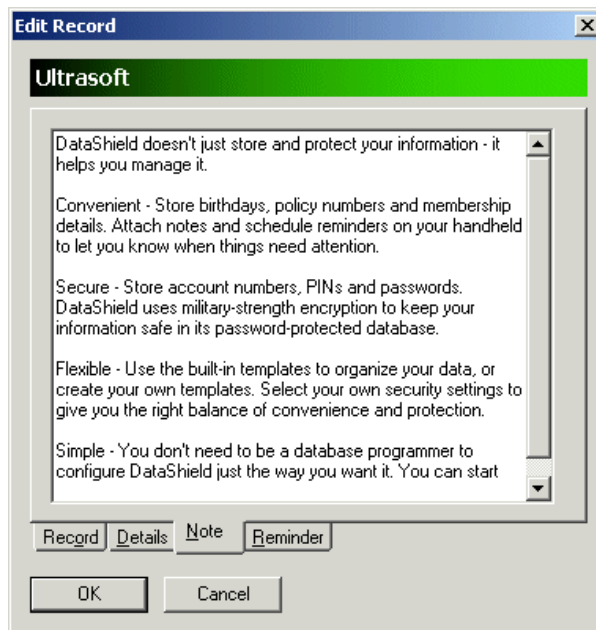
Default values for the record details and reminder schedule are inherited from the record's template. See [“Using Templates” on page 23](#).

- Click the **Show in List** drop-down arrow and select a field to be displayed in the second column of the Record View. The record's first field (usually the *Description* field) is always displayed in the first column.

- Click the **Category** drop-down arrow and select a category for the record. See “Using Categories” on page 19.
- Click the **Record Color** and **Record Icon** selectors to choose a color and icon for the Record View display. See “Viewing a Data Record” on page 13.
- Check the **Searchable** option to make the record searchable on your handheld using the Palm OS® Find function.
- Check the **Private** option to mark the record as private. Use the **Private Records** setting in the **View** menu to specify whether private records should be shown, hidden or masked.
- Check the **Archive** option to mark the record as archived. Archived records are not synchronized with your Palm OS handheld. See “Archiving Records” on page 20.

## Record Note

Click the **Note** tab to view the record note.



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

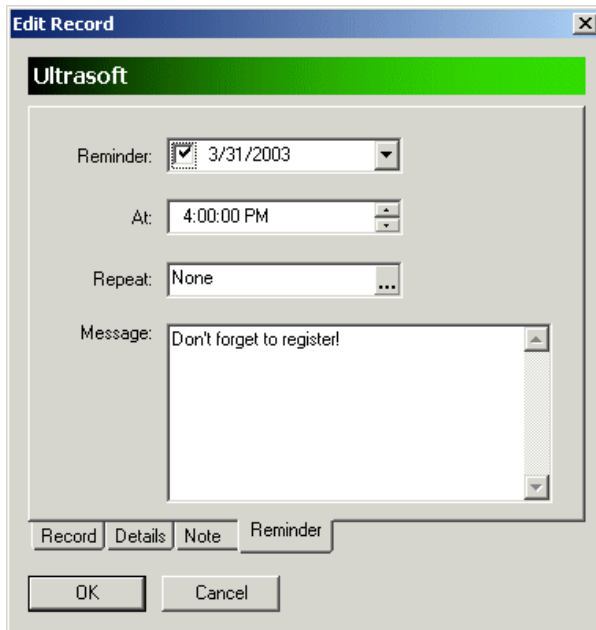
---

**TIP:** To enter a tab character in the note field, type *Ctrl-Tab*.

---

## Record Reminder

Click the **Reminder** tab to view the record reminder schedule and message.



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

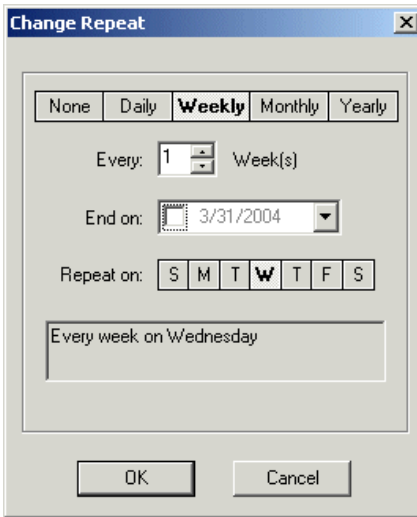
---

**Record reminders are displayed on your Palm OS handheld only. They are not displayed on your Windows computer.**

---

- Click the **Reminder** drop-down arrow and select a date for the reminder. To cancel the records reminder, deselect the checkbox.
- Choose a time for the reminder using the **At** selector.

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



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

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**TIP:** To enter a tab character in the message field, type *Ctrl-Tab*.

---

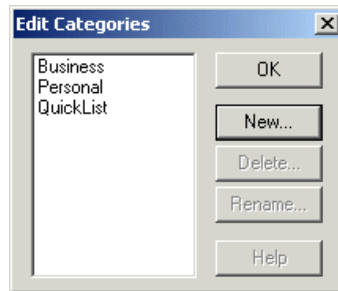
Click **OK** to save the record, or **Cancel** to discard your changes.

---

## Using Categories

Categories are used to filter records in the Record View. See [“The Record View” on page 10](#).

To create, rename or delete a category, choose the **Categories** option from the **Tools** menu, or select *“Edit categories”* from the category list in the Record List view.



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

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

---

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

---

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

Changes you make to the categories in DataShield are reflected on your Palm OS handheld the next time you synchronize.

---

## Printing

To print a record or template, select it in the Record or Template View, and click the **Print** toolbar button or select the **Print** option from the **File** menu.

To print all records or templates, open the Record or Template View, click the **Print** toolbar button or select the **Print** option from the **File** menu, and choose the **All** option.

---

## Backing Up Your Data

To back up your Ultrasoft DataShield for Windows database, choose the **Backup** option from the **File** menu.

Later, if necessary, you can use the **Restore** option from the **File** menu to restore your backed-up database. This will overwrite your current database with the data from the backup file.

You should periodically back up your database to a diskette, CD-RW or web archive so that it will be safe if your computer's hard drive should fail.

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## Archiving Records

To archive records and templates, use the **Archive** option from the **File** menu.

This option will export records that are marked *for archive* to a file that you specify, then delete those records and templates from your current DataShield database.

You can mark records and templates *for archive* by selecting them in the Record or Template View, and clicking the **Archive** button in the toolbar or selecting the **Archive** option from the pop-up menu. You can also mark records and templates *for archive* in the Record and Template Details dialogs. See [“Record Details” on page 15](#) and [“Template Details” on page 26](#).

Later, you can re-import data from an archive file using the **Import** option from the **File** menu.

---

## Importing and Exporting

Ultrasoft DataShield for Windows will export data to a text file in *Extended Markup Language* (XML) format, which preserves the complex structure of your DataShield data. Many utilities, including Microsoft® Internet Explorer, will allow you to work with XML files.

To export the data from your DataShield database, choose the **Export** option from the **File** menu. You will be prompted for the name of the export file, and you can choose whether or not the exported data is to be encrypted. Select or enter a file name and click the **Save** button.

To import data, use the **Import** option from the **File** menu. Imported records, templates and categories are merged with your current DataShield database.

You can import data from a DataShield archive or export file, or from a delimited text file, such as a *Comma-Separated Values* (CSV) file, generated by another program.

When you import from a delimited text file, the DataShield Import Wizard will display step-by-step instructions, prompt you to describe the file

layout, parse the data into columns, and walk you through the import process:

- You can specify which delimiters and qualifiers are used in the file.
- The first row of the file can contain column names, which can be used to automatically create a new template. Alternatively, you can select an existing template or explicitly create a new one.
- If you select an existing template, you are prompted to specify which template fields correspond to the imported data columns.
- You can specify a column that contains a category name for each record, or select an existing category.
- You can specify a column that contains a note for each record.
- If each row contains different kinds of data, you can specify a column that contains a template name, or select/create a template for each row as it is imported. You can also choose to be prompted to select a category and note column for each row.

---

You can also exchange data between DataShield and other programs using *copy/paste* and *drag/drop* operations. See [“Viewing a Data Record” on page 13](#) and [“Record Data Values” on page 14](#).

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# Using Templates

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## Overview

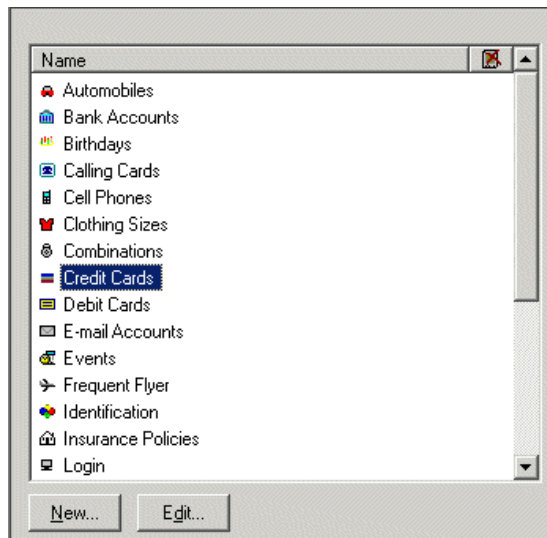
Ultrasoft DataShield uses templates as a basis for data records. When you create a new record, its fields, default settings and reminder schedule are based on the currently-selected or last-used template. See [“Creating and Editing Data Records” on page 14](#). In addition, the Record View can be filtered by template. See [“Viewing Your Data” on page 10](#).

DataShield comes with a set of pre-defined templates that you can use as a starting point for your own templates.

---

## Viewing Templates

The Templates View shows a list of available templates.



To access the Templates View, click the *Templates* icon in the shortcut pane, or select **Templates** from the **View** menu.

The list displays each template's name, and an icon to indicate if the template is marked *Archived*.

---

Templates that are marked *Archived*, and their records, are not synchronized with your Palm OS handheld, and can be exported and removed using the **Archive** command in the **File** menu. See [“Template Details” on page 26](#) and [“Archiving Records” on page 20](#).

---

With the preview pane enabled, select a template in the list to display its details.

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

To edit a template, double-click on its name in the list, or select it and click the **Edit** button.

To duplicate a template, click on its name in the list and use the **Copy** and **Paste** menu commands. Duplicating and modifying an existing template can be a quick way to create a new template.

To delete a template, click on its name in the list and then click the **Delete** button in the toolbar, or right-click the mouse on its name and choose the **Delete** command from the pop-up menu.

---

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

---

You can also select a template and use the main menu, pop-up menu, toolbar or keyboard shortcuts to cut, copy, paste, archive or print it.

---

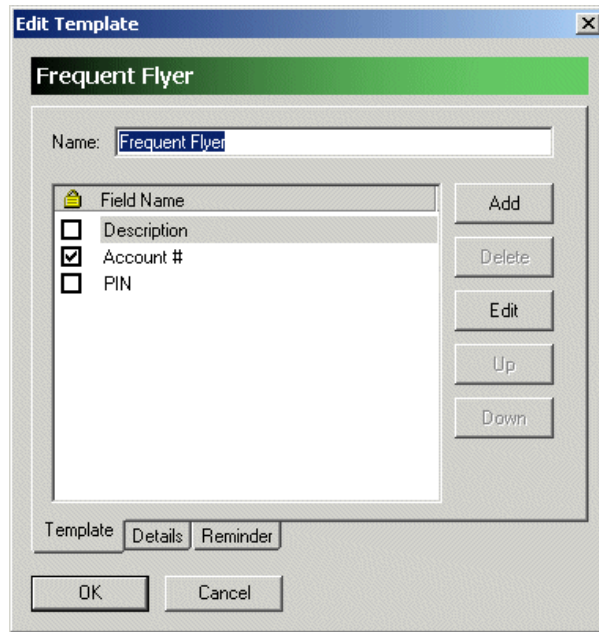
Keyboard shortcuts are displayed in the menus. Mnemonics for buttons and other controls are indicated by an underlined character in the button or other caption. *Windows XP users:* press the *Alt* key on your keyboard to highlight shortcut mnemonics.

---

## Creating and Editing Templates

To create a new template, click the **New** button in the Templates View, or use the **Copy** and **Paste** menu commands. To edit an existing template, double-click on its name in the Templates View list, or click its name and click 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.

---

- Click the **Add** button and enter a field name to add a new field.
- Click 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 click the **Delete** button to remove the field. When you click the **OK** button, the field will be removed from corresponding data records.
- Select a field and click the **Edit** button to rename it.
- Select a field and click the **Up** or **Down** button to change the order of the field in the list.

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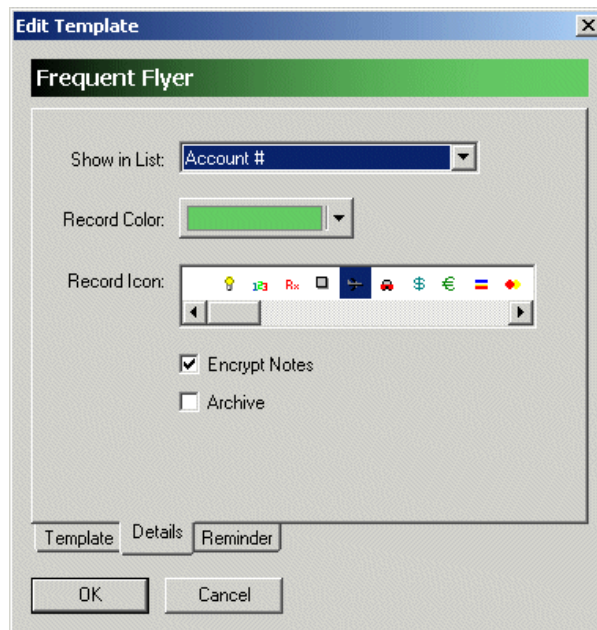
**NOTE:** When you reorder the fields in a template, the fields in related data records are also reordered.

---

Click the **OK** button to save or update the template, or click the **Cancel** button to discard your changes.

## Template Details

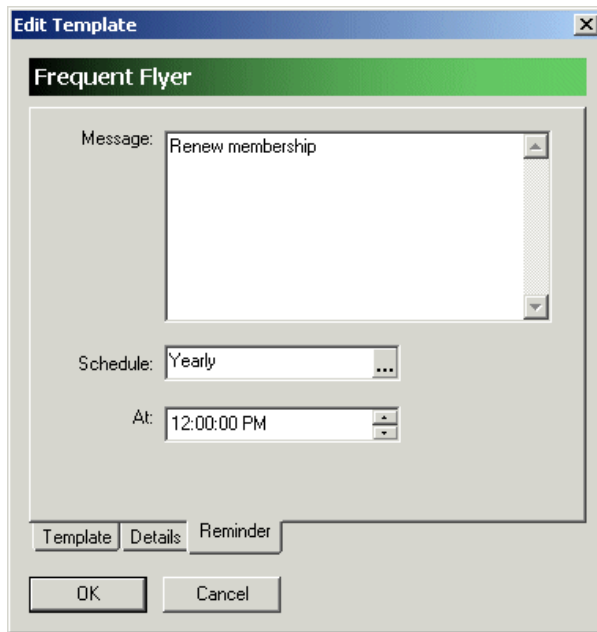
Click the **Details** tab to view to the template details.



- Click 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.
- Click the **Record Color** and **Record 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.
- Check the **Archive** option to mark the template as archived. Archived templates and their records are not synchronized with your Palm OS handheld. See [“Archiving Records” on page 20](#).

## Default Reminder Schedule

Click the **Reminder** tab to set or change the default reminder schedule for the template.



- Enter a reminder message in the **Message** field. This message will be displayed when a reminder is due for records based on the template.

---

**TIP:** To enter a tab character in the message field, type *Ctrl-Tab*.

---

- Click 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.
- Choose a time for the reminder using the **At** selector.

---

**Record reminders are displayed on your Palm OS handheld only. They are not displayed on your Windows computer.**

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# Data Security

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## Overview

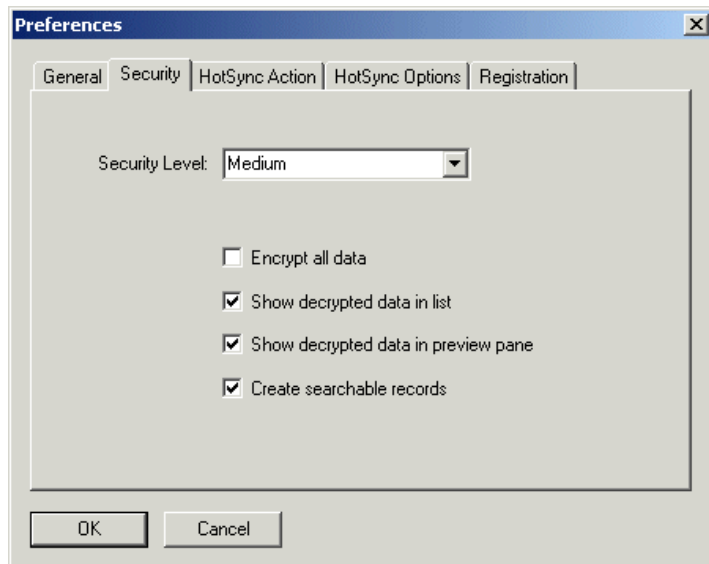
Information that you enter into DataShield is stored in a password-protected database.

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.

---

## Security Preferences

To access the Security Preferences, open the **Preferences** dialog via the **Tools** menu and select the **Security** tab.



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.

DataShield for Windows supports the following security options:

- **Encrypt All:** With this option enabled, DataShield will encrypt all your data, regardless of the encryption settings in your templates. See [“Creating and Editing Templates” on page 24](#).
- **Show decrypted data in list:** With this option enabled, DataShield will decrypt and display encrypted data in the Record View. Otherwise, it will mask encrypted data in the list. See [“Viewing Your Data” on page 10](#).
- **Show decrypted data in preview pane:** With this option enabled, DataShield will decrypt and display encrypted data in the Record Preview. See [“Viewing a Data Record” on page 13](#).
- **Create searchable records:** With this option enabled, new records will automatically have their *Searchable* attribute enabled. See [“Record Details” on page 15](#).

## Changing Your Password

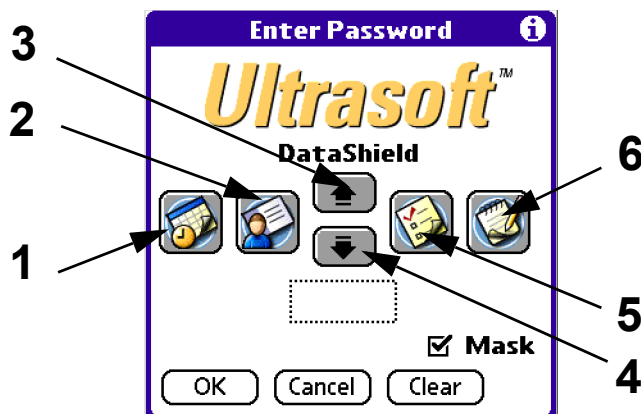
The first time you run Ultrasoft DataShield, it requires that you assign a password.

You can change your password at any time using the **Change Password** option in the **File** menu.



You can choose to synchronize the DataShield password on your Windows computer with DataShield on your Palm OS handheld. See [“HotSync Options” on page 35](#).

If you use the PIN password format on your Palm OS handheld, you must enter the corresponding numerical button values for the password on your desktop computer.



You can un-check the **Mask** checkbox and tap the buttons to determine their numeric button values.

If you use the alpha-numeric password format on your Palm OS® handheld computer, 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. For more information, see the DataShield for Palm™ Powered Handheld Computers User's Guide.

---

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

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## Locking DataShield

Ultrasoft DataShield will lock automatically when you close the program. You can lock DataShield at any time using **Lock Now** command from the **File** menu, or the **Lock Now** toolbar button. DataShield will lock immediately.

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

If you cancel the password prompt without entering your password, you can use the **Unlock** command from the **File** menu or the **Unlock** toolbar button to regain access to the program.

# Synchronization

---

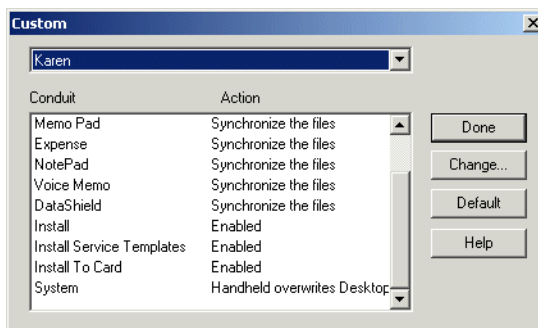
## Overview

Ultrasoft DataShield for Windows includes a conduit to synchronize your entries with DataShield on your Palm OS handheld. The conduit is installed when you run the Ultrasoft DataShield setup program on your Windows computer and choose the *Full Setup* option.

You can set the Ultrasoft DataShield synchronization preferences using the Palm Desktop *Custom* dialog, or using the **Preferences** dialog via the **Tools** menu in DataShield for Windows.

To access DataShield synchronization preferences using the Palm Desktop *Custom* dialog:

1. Open the **Start** menu and choose **Programs > Palm Desktop > Palm Desktop**.
2. To open the Custom dialog, open the **HotSync** menu and choose **Custom**.



3. Make sure that your Hotsync ID is selected in the top drop-down list.
4. Choose **DataShield** from the conduit list and click the **Change** button.

---

## Setting the Synchronization Properties

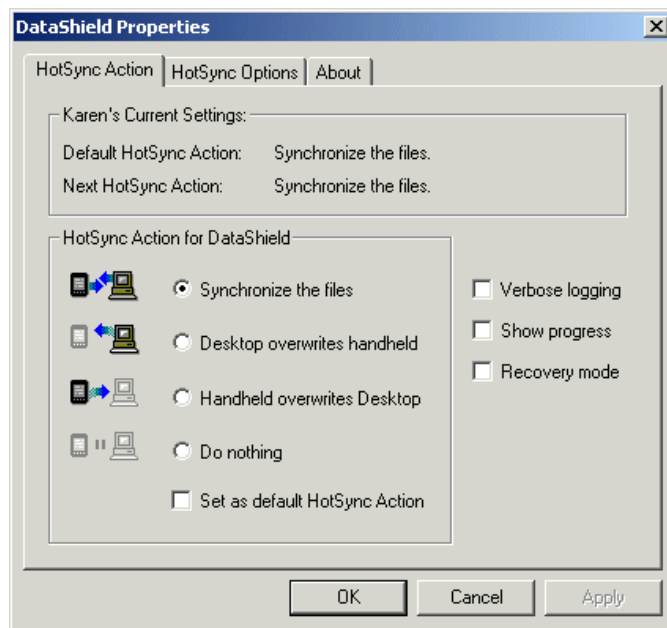
The DataShield Properties dialog includes the following tabs.

- [HotSync Actions](#)
- [HotSync Options](#)
- [The About Page](#)

---

## HotSync Actions

The HotSync Actions properties tab allows you to specify the action that HotSync will take the next time you synchronize Ultrasoft DataShield.



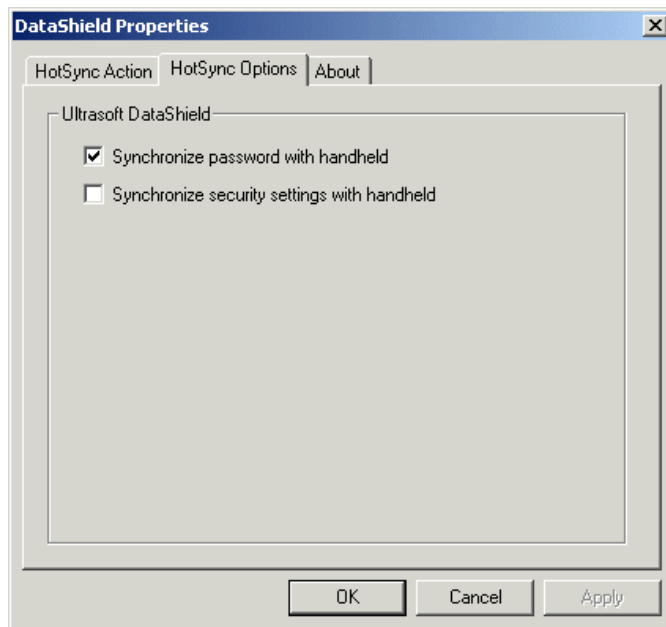
- **Synchronize the files:** changes to your DataShield database are exchanged between your Windows computer and your Palm OS handheld.
- **Desktop overwrites handheld:** the data from your Windows computer replaces the data on your Palm OS handheld.
- **Handheld overwrites desktop:** the data from your Palm OS handheld replaces the data on your Windows computer.
- **Do nothing:** no DataShield synchronization takes place.
- **Set as default Hotsync Action:** makes the selected option the default for subsequent HotSync operations.

- **Verbose logging:** additional information is recorded in the HotSync log.
- **Show progress:** displays a dialog that shows the synchronization status.
- **Recovery mode:** forces all records, not just modified or new records, to be uploaded from the Palm OS handheld and does NOT update the data on the handheld, so that you can try again if necessary. This can be used to try to recover lost data from the Palm if, for example, your PC hard drive crashes. Results are not guaranteed.

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## HotSync Options

The HotSync Options properties tab allows you to specify how you want your DataShield database synchronized.



- **Synchronize password with handheld:** your Ultrasoft DataShield password is synchronized between your Windows computer and your Palm OS handheld. If you change your password on one platform, the change is reflected on the other when you synchronize.
- **Synchronize security settings with handheld:** your security settings are synchronized between your Windows computer and your Palm OS handheld. See [“Security Preferences” on page 29](#).

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## The About Page

The **About** tab in the DataShield Properties dialog displays the Ultrasoft DataShield conduit version, and your HotSync ID or user name. This is also where you enter your Ultrasoft DataShield registration code to activate full synchronization.

You can also enter your registration code in DataShield for Windows via its **About** dialog, or in its **Preferences** dialog on the **Registration** tab. See [“How do I register Ultrasoft DataShield?” on page 38](#).

# Helpful Hints and Troubleshooting

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

## System Requirements

Ultrasoft DataShield for Windows requires Microsoft® Windows® 98 or later.

DataShield for Palm OS handhelds requires Palm OS® 3.0 or later.

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](http://www.adobe.com) for a free copy of Acrobat Reader.

## 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 based 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 any one of the following locations:

- in the **About** screen of the DataShield application on your Palm OS® handheld device, or
- in the **About** dialog in DataShield on your Windows computer (click the **Register** button), or
- in the **Register** tab in the **Preferences** dialog in DataShield on your Windows computer, or
- in the **About** tab in the DataShield conduit settings (see “[Setting the Synchronization Properties](#)” on page 34).

When you enter your registration code into one DataShield program, it will be synchronized with the others.

## 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 e-mail 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>

or:

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

### *E-mail Support*

If you send e-mail to [support@ultrasoft.com](mailto:support@ultrasoft.com), our support robot will read your e-mail and suggest solutions.

Please include the following information in your 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.



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