User Guide for M-Business Anywhere™ Client

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Contents

About this guide

Focus of this guide

This guide provides the information you need to install and use M-Business Client, the client component of M-Business Anywhere™. This guide also includes information on using M-Business Client with wireless service providers.

If you use M-Business Client software on your mobile device, you should read this guide to familiarize yourself with the features and functions of M-Business Client. If you are an M-Business Server administrator, you should refer to this guide to gain a better understanding of the tasks that the M-Business Client user performs.

This document is provided in PDF format and is accessible by clicking the **View User Guide** link on either the M-Business Server or the M-Business Client login pages.

How this guide is organized

M-Business Client supports five device platforms, or operating systems: Palm™ OS, Microsoft® Windows Mobile Pocket PC, Microsoft Windows XP, Microsoft Windows Mobile 5, and Microsoft Smartphone. For easy use, this guide is divided into parts based on operating systems. Microsoft Windows Mobile 5 and Microsoft Smartphone are similar enough that they are combined in one part.

"Installing M-Business Client" on page 15, at the front of the book, provides the information you will need to set up M-Business Client. Separate chapters cover installation on the different operating systems.

From your desktop, you can perform functions common to all device platforms. You also can perform many of these functions from your device. The chapters in the list below provides explanations of functionality and instructions for performing tasks from your desktop.

- "Configuring M-Business Client on the desktop computer" on page 41
- "Managing channels on the desktop computer" on page 57
- "Using M-Business Client on a device" on page 69

To perform some of these same functions from your device, see the chapters that cover your device's operating system.

Sections of the book that cover specific device operating systems also provide instructions for using M-Business Client on your device, including connecting online.

Appendix "Troubleshooting" on page 285, at the end of the book, provides possible causes and solutions for problems you may have with synchronizing and viewing content for all devices.

Conventions

Text conventions

The following table lists the formatting conventions used throughout this guide.

Table 1. Formatting conventions

Item	Treatment	Example
Name of publication	Italic	*Administrator Guide for M-Business Server*
Items on which user is to take an action	Bold	Click the **Reset** button.
Multi-level menu selections	Bold with "»" separator	Choose **Start»Settings» Control Panel.**
Text you type	Bold, fixed width font	Type **`Admin`** in this field.
Text displayed in a file or on the screen	Fixed width font	The screen reads: `Backup Complete`
Keyboard key	Angle brackets	<Enter>
File names and paths	Italic	*.../conf/sync.conf*
Literals in code synopsis	Bold	void **PODSaddRef(**PODSObject* *podsobj***);**
Variables in code synopsis	Italic	void **PODSaddRef(**PODSObject* *podsobj***);**
Variables in text	Angle brackets plus italic	http://*<servername>*:*<port>*

Graphics conventions

For Windows Mobile Pocket PC devices, screenshots are of a version 3.0 device. For Windows Mobile 5 and Microsoft Smartphone devices, screenshots are of a version 5.0 device. The user interface may look different for devices running higher or lower versions. For Windows XP, screenshots are of a Windows XP device. The user interface may look different for devices running a different Windows 32-bit OS.

The M-Business Anywhere documentation set

In addition to this document, there are several other iAnywhere Solutions publications available that you may find useful in setting up and using M-Business Server.

Note
Unless otherwise noted, all of these publications are available from: http://www.ianywhere.com/developer/product_manuals/mbusiness_anywhere/
In order for links between different PDF files to work correctly, you must open the files directly from the web site, or download them from the web site into the same local directory.

- *Developer Quick Start Guide for M-Business Anywhere*
- *Release Notes for M-Business Anywhere*
- *User Guide for M-Business Anywhere Client*
- *M-Business Anywhere, an Introduction*
- *Application Developer Guide for M-Business Anywhere*
- *API Reference for M-Business Anywhere*
- *Ensuring Mobile Security from the Device to the Datacenter*, available from http://www.ianywhere.com/whitepapers/ensuring_security.html

Contacting iAnywhere Solutions

Technical support

If you need assistance using iAnywhere software, in North America, please contact iAnywhere Technical Support by calling 1-800-8SYBASE (800-879-2273) and then selecting option 3. You can call Monday through Friday (except major US holidays) between 9:00 a.m. and 9:00 p.m. Eastern time. Services will be provided in accordance with your support agreement.

Outside of North America, for your local support number and hours, please see: http://www.sybase.com/contactus/support

Registering as a Named Contact

Calling the 800-number during business hours should always work to get you technical support — a Customer Number is created for you as soon as your purchase is completed. You will find it faster and easier to get technical support, by phone or online, if you have registered as a Named Contact.

When you purchase an iAnywhere product, a *Sybase Technical Support Contact Form* will automatically be emailed to you within 7-10 days. If your company should need to add another Named Contact, or change the one initially registered, call the Technical Support 800-number and request a *Sybase Technical Support Contact Change Form*.

The *Sybase Technical Support Contact Form* will contain your Customer Number, with spaces for you to provide an email address and other identifying information for the Named Contact for your product. Fill in the requested information and fax the form back to the phone number indicated.

When your fax is received, an email will be sent to you, providing your Technical Contact ID number. You can then use this number to speed up the process when you call for technical support, and to access technical support online.

Using the Sybase Online Support Services

A major benefit of using the Sybase Online Support Services is 24x7 availability. Online support also allows you to look up and review past and current support issues.

When you register as a Named Contact, the email sent to you with your Technical Contact ID number also contains instructions for registering and using the Sybase Online Support Services. Follow these instructions to register as a first-time user, or to update your account with information for the new product you have purchased.

If you have any trouble registering for the Sybase Online Support Services, you can of course call iAnywhere Technical Support for assistance!

Application development — customizing iAnywhere software

If you need help with customizing iAnywhere software to better serve your enterprise, please contact iAnywhere Solutions Professional Services at contact_us@ianywhere.com.

Product information

If you need information about other iAnywhere products for your enterprise, please contact iAnywhere Workforce Sales at contact_us@ianywhere.com.

Feedback on documentation

If you have questions or suggestions about this document or other iAnywhere technical publications, please contact iAnywhere Technical Publications at iasdoc@ianywhere.com.

We would like to receive your opinions, suggestions, and feedback on this documentation. Although we do not reply to individual emails, we read all suggestions with interest and attempt to incorporate them in future releases.

Part I. Before You Begin

CHAPTER 1

Introduction

Contents

About M-Business Client

M-Business Client is software that you install on your mobile device to provide you with mobile access to mission-critical applications and data.

M-Business Client works with M-Business Server to deliver these mobile applications and data to your device. When combined with powerful Mobile Engines for specific applications, M-Business Server provides the fastest, easiest, and most widely used way to deliver applications and data from backend systems to mobile devices based on the Palm, Windows Mobile Pocket PC, Windows XP, Windows Mobile 5, and Microsoft Smartphone operating systems.

You can install and configure M-Business Client for yourself. Your system administrator installs and configures M-Business Server. After installing the software, you either register an account for yourself, or your system administrator creates one for you. If you do not know which option you should use, consult your system administrator.

M-Business Client components

M-Business Client consists of software for your desktop computer and for your mobile device.

M-Business Connect

The desktop component of M-Business Client is M-Business Connect, which is the conduit that allows you to synchronize your device with M-Business Server. The settings in M-Business Connect provide the information that M-Business Client uses to communicate with M-Business Server.

If you use a Palm OS, Windows Mobile Pocket PC, or Windows XP device, M-Business Connect also installs on your mobile device, allowing you to configure settings for M-Business Server directly on your device and to synchronize remotely (if your device is equipped with a modem, network, or wireless connection).

M-Business Client on your mobile device

On your device, M-Business Client provides access to rich, interactive data and web content. Using M-Business Client, you can view web-based enterprise applications and content.

Communication between your device and M-Business Server

Your device communicates with M-Business Server in one of two ways: through your desktop computer, when you use a cradle to synchronize, or through a remote connection, such as a wireless or modem connection.

If you use a Palm OS, Windows Mobile Pocket PC, or Windows XP device, M-Business Client always uses M-Business Connect to communicate with M-Business Server.

System requirements

Desktop computer requirements

To install M-Business Client on your mobile device, you must use a desktop cradle. After installing the software, if you synchronize remotely with M-Business Server (Palm OS, Windows Mobile Pocket PC, or Windows XP only), you also can use a modem or Ethernet card.

- Microsoft Windows:
  - Windows 2000 Professional with Service Pack 4
  - Windows XP Professional
  - Windows XP Home
  - Windows Vista

> **Note**
> Administrator rights are required to install M-Business Client software on PCs running Windows NT Workstation or Windows 2000. If you do not know whether you have administrator rights on your desktop computer, check with your system administrator.

- A modem or Ethernet card.

Palm OS devices

Palm OS desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

> **Note**
> If you will use Microsoft Internet Explorer proxy settings to connect securely to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See "Configuring proxy server settings" on page 49.

- HotSync® Manager 3.0 or greater

  The Palm OS version of M-Business Client software must be installed separately for each individual profile on a computer.

Palm OS mobile device requirements

- 2 MB of free memory

iAnywhere has verified that the following devices are compatible with the current release:

Palm™ Tungsten C, E2, T, T5, W, X; Treo 600, 650, and 700p.

Palm OS User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Palm OS:

- "Configuring a server connection on Palm OS" on page 83
- "Using M-Business Client on Palm OS" on page 93

Windows Mobile Pocket PC devices

Windows Mobile Pocket PC desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

> **Note**
> If you use Microsoft Internet Explorer proxy settings to connect to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See "Configuring proxy server settings" on page 49.

- ActiveSync version required by your Windows Mobile Pocket PC model

The Windows Mobile Pocket PC version of M-Business Client software is installed globally. This means that all user profiles on the same computer will be able to use M-Business Client without further adjustment. M-Business Client also has to be installed onto each user's device.

> **Note**
> You must have established at least one partnership with a mobile device in ActiveSync before installing M-Business Client. For information on partnerships, see Microsoft's documentation.

Windows Mobile Pocket PC mobile device requirements

- Windows Mobile Pocket PC devices, including Pocket PC and Handheld PC devices, running version 3.0 and using ARM processors with 2 MB of free memory.
- Pocket PC 2003 with 2 MB of free memory
- Pocket PC Phone Edition 2000 and 2003 with 2 MB of free memory

iAnywhere has verified that the following devices are compatible with the current release:

- ARM processor models including: iPAQ™; HP Jornada 560.

Windows Mobile Pocket PC User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Windows Mobile Pocket PC:

- "Configuring a server connection on Windows Mobile Pocket PC " on page 125
- "Using M-Business Client on Windows Mobile Pocket PC" on page 137

Windows XP devices

Some Windows XP devices are configured to synchronize directly to M-Business Server, without the use of a desktop computer. Others may synchronize via a desktop computer with M-Business Connect.

Windows XP desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

> **Note**
> If you will use Microsoft Internet Explorer proxy settings to connect to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See "Configuring proxy server settings" on page 49.

Windows XP mobile device requirements

iAnywhere has verified that the following Windows operating systems are compatible with the current release:

- Windows XP Tablet Edition
- Windows XP Professional
- Windows Vista

iAnywhere has verified that the following devices are compatible with the current release:

- HP Compaq Tablet PC
- Fujitsu Stylistic ST5000 and ST5000D Tablet PCs
- Toshiba Tecra M4-S115TD and Satellite R10-S802TD Tablet PCs

Windows XP User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Windows XP:

- “Configuring a server connection on Windows XP” on page 167
- “Using M-Business Client on Windows XP” on page 177

Windows Mobile 5 devices

Windows Mobile 5 desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

> **Note**
> If you use Microsoft Internet Explorer proxy settings to connect to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See “Configuring proxy server settings” on page 49.

- ActiveSync version required by your Windows Mobile Pocket PC model

The Windows Mobile 5 version of M-Business Client software is installed globally. This means that all user profiles on the same computer will be able to use M-Business Client without further adjustment. M-Business Client also has to be installed onto each user’s device.

> **Note**
> You must have established at least one partnership with a mobile device in ActiveSync before installing M-Business Client. For information on partnerships, see Microsoft's documentation.

Windows Mobile 5 mobile device requirements

- Windows Mobile 5 devices, including Windows Mobile and Handheld PC devices, using ARM processors with 2 MB of free memory.
- Windows Mobile 5 2003 with 2 MB of free memory.

iAnywhere has verified that the following devices are compatible with the current release:

- Dell X51 and Dell X51v
- iPAQ™ RX1950
- Palm Treo 700w

Windows Mobile 5 User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Windows Mobile 5:

- "Configuring a server connection on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 205
- "Using M-Business Client on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 219

Windows Mobile 6 devices

Windows Mobile 6 desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

  > **Note**
  > If you use Microsoft Internet Explorer proxy settings to connect to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See "Configuring proxy server settings" on page 49.

- Microsoft Mobile Device Center (MDC) version required by your Windows Mobile Pocket PC model

The Windows Mobile 6 version of M-Business Client software is installed globally. This means that all user profiles on the same computer will be able to use M-Business Client without further adjustment. M-Business Client also has to be installed onto each user's device.

> **Note**
> You must have established at least one partnership with a mobile device in Mobile Data Center before installing M-Business Client. For information on partnerships, see Microsoft's documentation.

Windows Mobile 6 mobile device requirements

- Windows Mobile 6 devices, including Windows Mobile and Handheld PC devices, using ARM processors with 2 MB of free memory.

iAnywhere has verified that the following devices are compatible with the current release:

- Dell X51 and Dell X51v
- iPAQ™ RX1950
- Palm Treo 700w

Windows Mobile 6 User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Windows Mobile 6:

- "Configuring a server connection on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 205
- "Using M-Business Client on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 219

Microsoft Smartphone devices

Microsoft Smartphone desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0

> **Note**
> If you use Microsoft Internet Explorer proxy settings to connect to M-Business Server, you must use Internet Explorer 5.5 or higher with 128-bit encryption. See "Configuring proxy server settings" on page 49.

- ActiveSync version required by your Windows Mobile Pocket PC model

The Microsoft Smartphone version of M-Business Client software is installed globally. This means that all user profiles on the same computer will be able to use M-Business Client without further adjustment. M-Business Client also has to be installed onto each user's device.

> **Note**
> You must have established at least one partnership with a mobile device in ActiveSync before installing M-Business Client. For information on partnerships, see Microsoft's documentation.

Microsoft Smartphone mobile device requirements

- Microsoft Smartphone devices running Windows Mobile 5, with 2 MB of free memory.
- Microsoft Smartphone devices running Windows Mobile 2003, with 2 MB of free memory.

iAnywhere has verified that the following devices are compatible with the current release:

- Devices with Windows Mobile 5 OS:
  - Motorola Q
  - Cingular 2125
- Devices with Windows Mobile 2003 OS:
  - Motorola MPX220
  - Audiovox SMT5600

Microsoft Smartphone User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Microsoft Smartphone:

- "Configuring a server connection on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 205
- "Using M-Business Client on Windows Mobile 5 or 6, or Microsoft Smartphone" on page 219

Symbian OS devices

Symbian OS desktop computer requirements

- Microsoft Internet Explorer 5.5 or 6.0 or 7.0

  or

  Mozilla Firefox 2.0
- Nokia PC Suite

Symbian OS mobile device requirements

- Nokia Series 60 phone phone with 2 MB of free memory
- Symbian OS 9.1, 3rd edition

iAnywhere has verified that the following devices are compatible with the current release:

- Nokia N Series: N71, N73, N80, N91, N93
- Nokia E Series: E60, E61

Symbian OS User Guide chapters

In addition to the chapters that apply to all platforms, see the following chapters for detailed instructions that are specific to Symbian OS:

- "Configuring a server connection on Symbian OS" on page 249
- "Using M-Business Client on Symbian OS" on page 259

Part II. Installation

CHAPTER 2

Installing M-Business Client

Contents

Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device

On Windows Mobile Pocket PC, Windows Mobile 5 and 6, and Microsoft Smartphone devices that support secure digital (SD) cards (flash memory addition for mobile devices), M-Business Client allows you to use your SD card two ways: you can install M-Business Client on the card and/or you can store synchronized channel data on the card.

> **Note**
> System access to data on SD cards is slower than access to data in main memory, so access to data or programs on an SD card will be slower than access to the device main memory. How much slower depends the speed of your device and the speed of the connection to the SD card — on newer, faster devices, the slower response may hardly be noticeable, while on older, slower devices, the slower response may intolerable.

On Palm OS devices, you cannot install M-Business Client on an SD card, but you can store synchronized channel data on the card on Palm OS 5 devices.

> **Caution**
> Use of SD cards with Palm OS devices is not yet fully supported in M-Business Anywhere version 6.7. The initial testing that has been performed indicates basically that the feature can be used, but it is less stable than the implementation on devices with Microsoft OSes. If you wish to try storing synchronized channel data on an SD card on your Palm OS device, see the instructions provided in the AvantGo FAQ topic linked below:
> How do I sync my AvantGo content to a Palm OS 5 memory card?

Installing M-Business Client on a secure digital (SD) card

When you install M-Business Client, if the installer detects an SD card on your device, you will be prompted to install on the card vs. the device main memory.

> **Caution**
> When M-Business Client is installed on an SD card, M-Business Client can freeze up and become unusable if the SD card is removed and replaced — a soft reset is required to recover from this situation.

> **Note**
> If you choose to install M-Business Client on your SD card, all channel data synchronized from servers will also have to be stored there. If you choose to install M-Business Client on your device main memory, you can then choose to store synchronized channel data on either the SD card or in main memory.

Storing synchronized server data on a secure digital (SD) card

If your device has an SD card, but you install M-Business Client in main memory, you can then specify for each server with which you synchronize whether the channel data is stored on the SD card or in main memory. See the "Configuring a Server Connection..." chapter for your platform, "Configuring a new server connection" and "Editing a server connection" topics.

Installing M-Business Client to use a secure digital (SD) card on your Symbian OS device

If you install M-Business Client to use a secure digital (SD) card on Symbian OS, both the M-Business Client software and all downloaded data are stored on the SD card.

Installing M-Business Client with self-registration

If your system administrator has enabled the self-registration feature on M-Business Server, you will see the **New Account Registration** link on your login page.

If M-Business Server is integrated with a Microsoft Windows NT domain, or if your system administrator has not enabled self-registration, your system administrator creates an account for you. See "Installing M-Business Client to use with an existing account" on page 26.

Installing M-Business Client involves several steps. A series of web screens will guide you through the process.

♦ To install M-Business Client

1. Install M-Business Client on your desktop computer.
2. Register your account on M-Business Server.
3. Configure your connection to M-Business Server.

> **Note**
> If your system administrator has created optional channel groups for you to join, you may join groups during registration. If you want to do this, see "Joining groups" on page 24.

4. Install M-Business Client on your mobile device.

If you are using more than one computer to synchronize your mobile device, you must install M-Business Client and M-Business Connect software on each computer.

If you want to use M-Business Client with more than one mobile device, you must establish separate M-Business Server user accounts, one account for each mobile device. To configure separate accounts, talk to your system administrator.

Installing M-Business Client on your desktop computer with self-registration

> **Note**
> The Symbian OS version of M-Business Client is not available through the Administrator Console. Contact your M-Business system administrator to get the Symbian client.

♦ To install M-Business Client on your desktop

1. Start your web browser.

   In your browser's address field, enter

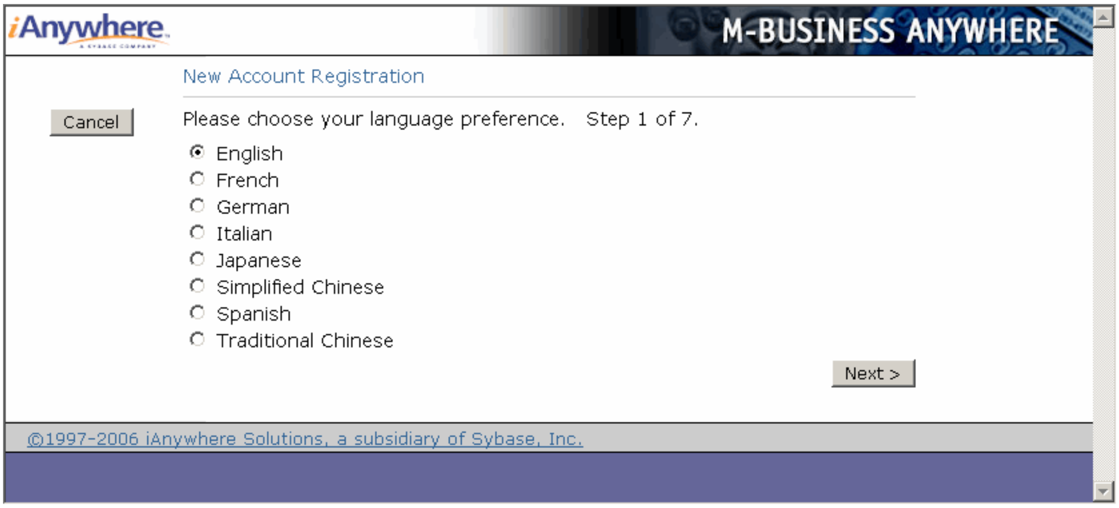
   http://<servername>:8091, replacing `<servername>` with the name of your M-Business Server machine. Your system administrator can provide you with this name.

If your system administrator installed the server on a port other than port 8091, enter **http://<servername>:<port number>**.

The M-Business Anywhere login page appears.

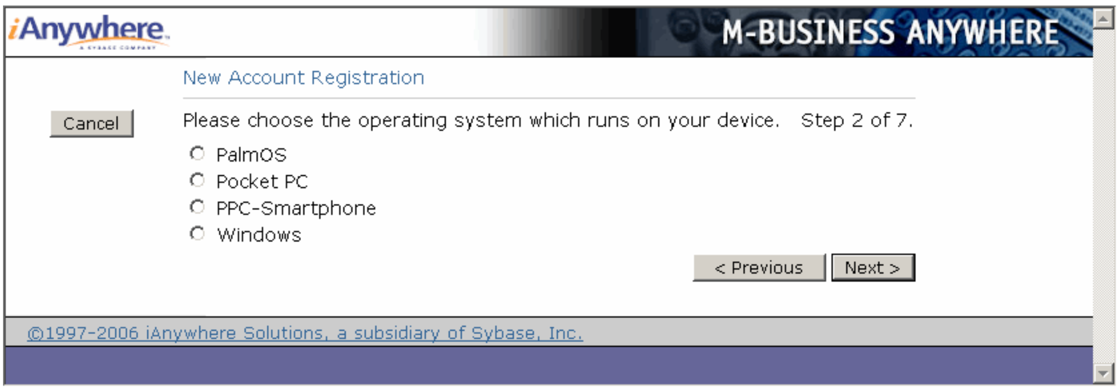
2. Click the **New Account Registration** link.

The first New Account Registration screen appears.



3. Click the language you want, then click **Next**.

The list of platforms, or device operating systems, available in that language is displayed.



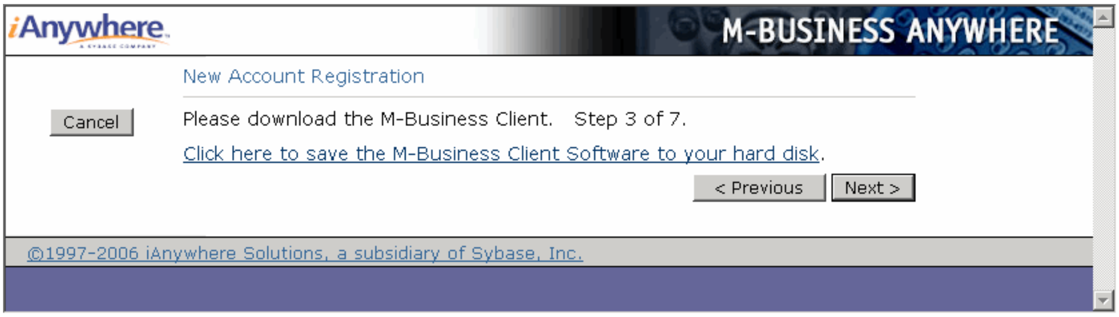
4. Click the platform, or device operating system, that you want.

- **PalmOS** — for any Palm OS device (*not* for Palm-branded devices running a Microsoft OS)
- **Pocket PC** — for non-phone devices with "Pocket PC" in the branding, including Windows Mobile 5 devices (the installer automatically detects older Pocket PC vs. newer Windows Mobile 5 Pocket PC and installs the correct version)

- **PPC-Smartphone** — for Microsoft Smartphone devices (does not work with other "Smartphone" devices that do not have Microsoft in the branding)
- **Windows** — for any device with a Windows XP operating system, for example, Tablet PCs and laptops

5. Click **Next**.

   A download link for the language and platform you have selected is displayed.



6. Click the **Click here to save the M-Business Client Software to your hard disk** link.

   A File Download dialog is displayed.

7. Click **Save** to save the program to disk.
8. Select a folder into which the installer program file will be saved, then click **Save**.

   A Download dialog will show you the progress of the file transfer and display the message Download Complete when the file is copied into the folder you selected.

Note
Make sure that the **Close this dialog box when download completes** checkbox is *not* selected. If you leave this checkbox selected, you will have to manually locate the installer file on your hard disk.

9. When the download is complete, click **Run** to start the InstallShield Wizard.

Note
If the installer detects a secure digital (SD) card on your device, you will be prompted to install on the SD card vs. the device main memory.
On Windows Mobile 5 and 6 and Microsoft Smartphone, a dialog pops up on the *device* asking whether you want to install to the device main memory or to the SD card.
On Pocket PC, you will see a dialog on the *desktop* asking whether you want to install to the "default location" (device main memory) — if you choose NO, you will see a dialog that allows you to select the SD card as the installation target.
Be sure that you understand the issues involved before you choose to install M-Business Client on your SD card. See “Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device” on page 16.

> **Tip**
> If the Download dialog closed after completing, you can use Windows Explorer to search for the installer file name listed in step 2 in your browser window. Double-click the installer file to continue with the next step below.

10. Follow the instructions on the InstallShield Wizard screen to install M-Business Client on your desktop computer.
11. Click **OK** when you see the screen display a message telling you that M-Business Client will be installed to your device the next time you synchronize.

> **Note**
> M-Business Client also installs M-Business Connect on your desktop and mobile device. M-Business Connect enables M-Business Client to communicate with M-Business Server.

12. Return to your browser window where the M-Business Client Download screen is still displayed.

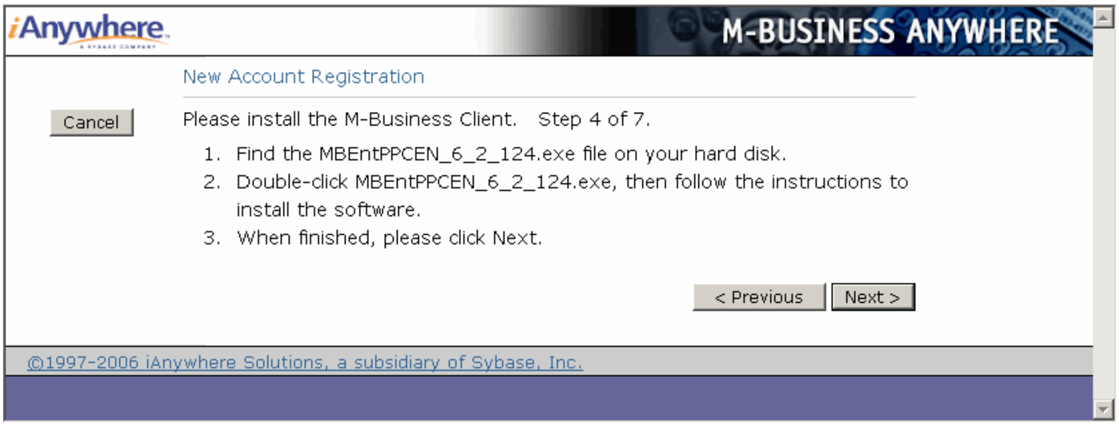
    Continue with the next section to register your account.

Registering your account

♦ To register your account

1. In the New Account Registration screen ("Step 3 of 7") in your browser, click **Next**.

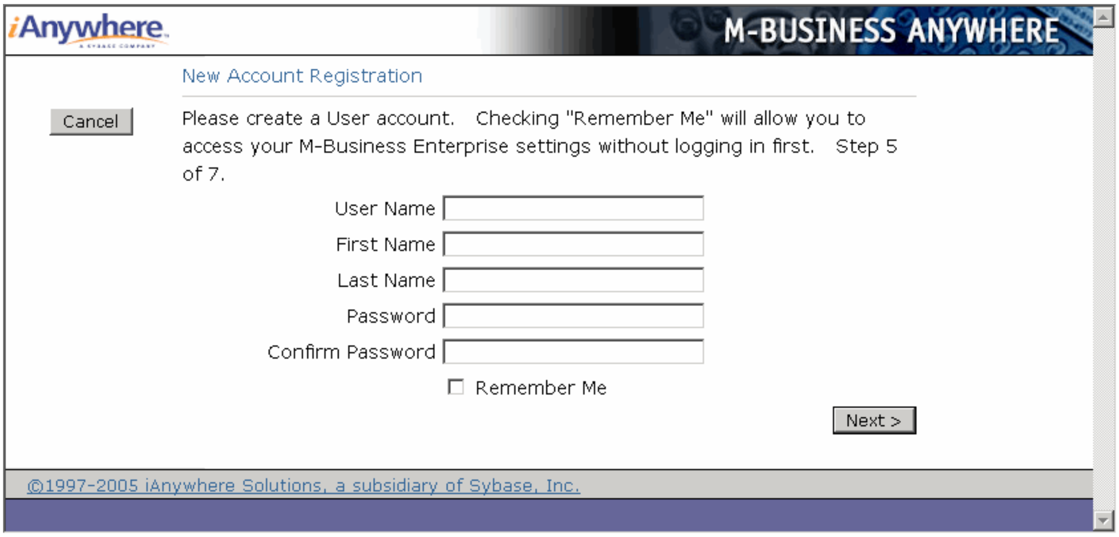
   The next screen ("Step 4 of 7") appears.



2. If you ran the installer file by clicking the Run button in the Download dialog, you can ignore this screen and just click **Next**.

   If you closed the Download dialog without running the installer file, follow the directions on the Install screen ("Step 4 of 7") and click **Next** after you are finished.

The Register screen ("Step 5 of 7") appears.

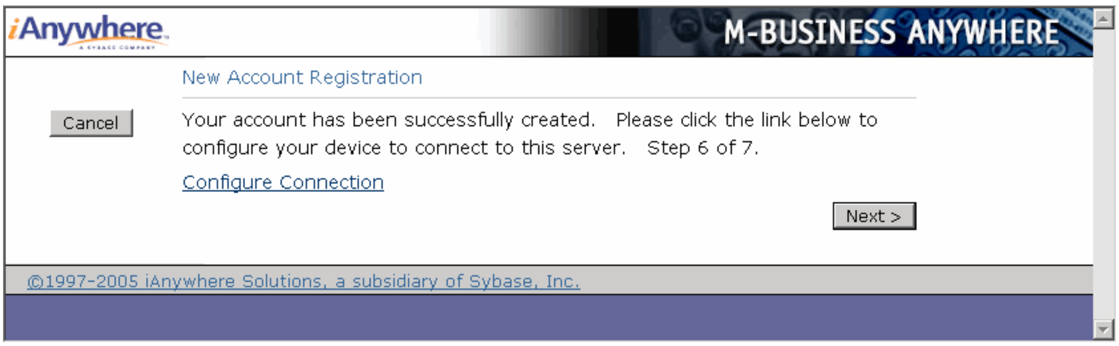


3. Enter your information in the **Username**, **First Name**, **Last Name**, **Password**, and **Confirm Password** fields.

   If you do not want to re-enter your user name and password every time you access your account, select the **Remember me** checkbox.

4. Click **Next**.

   The next screen ("Step 6 of 7") appears. You should see a message saying that your account has been successfully added to the server. If you do not see this message, contact your system administrator.

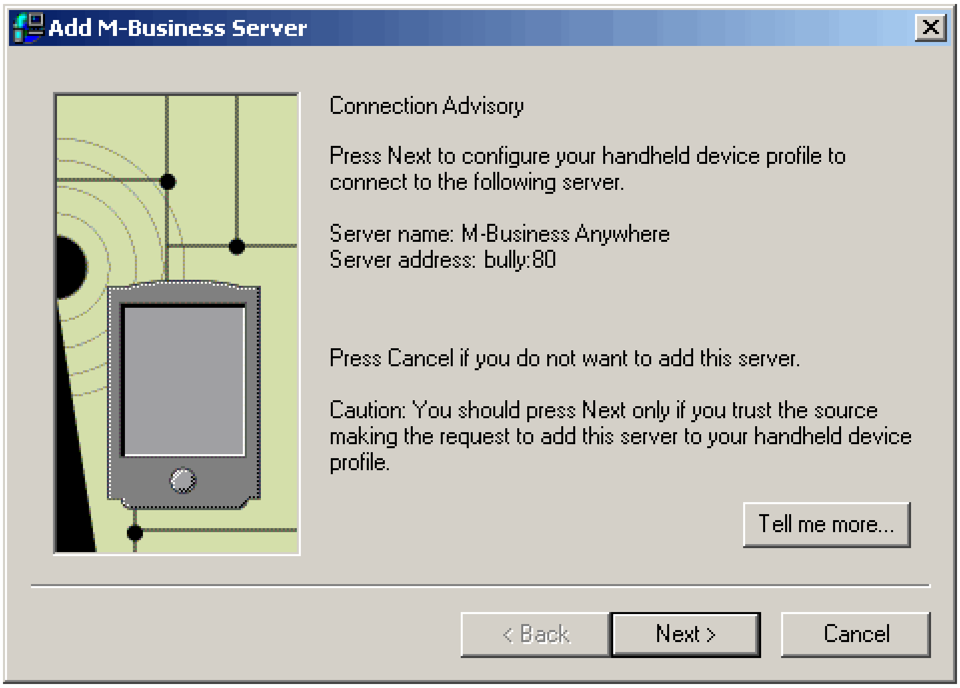


Configuring your server connection

♦ To configuring your server connection

1. In the "Step 6 of 7" New Account Registration screen in your browser, click **Configure Connection**.

   The Add M-Business Server dialog appears.



2. Click **Next**, then follow the directions on the following screens to configure your mobile device's connection to the server.

3. When you return to the "Step 6 of 7" New Account Registration screen in your browser, click **Next**.

   If your system administrator has defined optional groups for you to join, the "Step 7 of 7" New Account Registration screen appears. See "Joining groups" on page 24.

   If your system administrator has not defined optional groups for you to join, the Channel List for User... page appears. See "Installing M-Business Client on your mobile device" on page 25.

Joining groups

♦ To join groups

1. In the "Step 7 of 7" New Account Registration screen, select the checkboxes beside the groups you want to join.

> **Note**
> If you do not want to join any groups, just click **Next**.

2. Click **Next**.

   The Channel List for User... page appears.

   See "Installing M-Business Client on your mobile device" on page 25.

Installing M-Business Client on your mobile device

On completion of the desktop installation process, you are taken to the Channel List for User... page. You are logged in to the M-Business Administrator Console, where you can manage aspects of your account that are under your control. For instructions, see “Introducing the Administrator Console” [*M-Business Anywhere Administrator Guide*].

Meanwhile, you need to install M-Business Client on your device. This happens automatically the first time you synchronize:

♦ To install M-Business Client on your device

1. Synchronize your device.

   See the documentation that came with your device for instructions.

2. Synchronize again to download your channel content to your device.

Installing M-Business Client to use with an existing account

If M-Business Server is integrated with a Windows NT domain, or if your system administrator has not enabled self-registration, your system administrator creates an account for you.

If M-Business Server is integrated with a Windows NT domain, your user name and password will be the same as your Windows domain user name and password. If you do not know whether M-Business Server is integrated with a Windows NT domain, check with your system administrator.

If M-Business Server is not integrated with a Windows NT domain, but your system administrator has created an account for you, your system administrator will provide you with your user name and password. If your account does not yet have a password assigned, log into M-Business Server (you do not need to enter a password) and create a password for your account. See "Changing your password" on page 47.

Installing M-Business Client involves several steps.

♦ To install M-Business Client

1. Install M-Business Client on your desktop computer.
2. Configure your connection to M-Business Server.
3. Install M-Business Client on your mobile device.

If you are using more than one computer to synchronize your mobile device, you must install M-Business Client and M-Business Connect software on each computer.

If you want to use M-Business Client with more than one mobile device, you must establish separate M-Business Server user accounts, one account for each mobile device. To configure separate accounts, talk to your system administrator.

Installing M-Business Client on your desktop computer with an existing account

> **Note**
> The Symbian OS version of M-Business Client is not available through the Administrator Console. Contact your M-Business system administrator to get the Symbian client.

♦ To install M-Business Client on your desktop

1. Start your web browser.

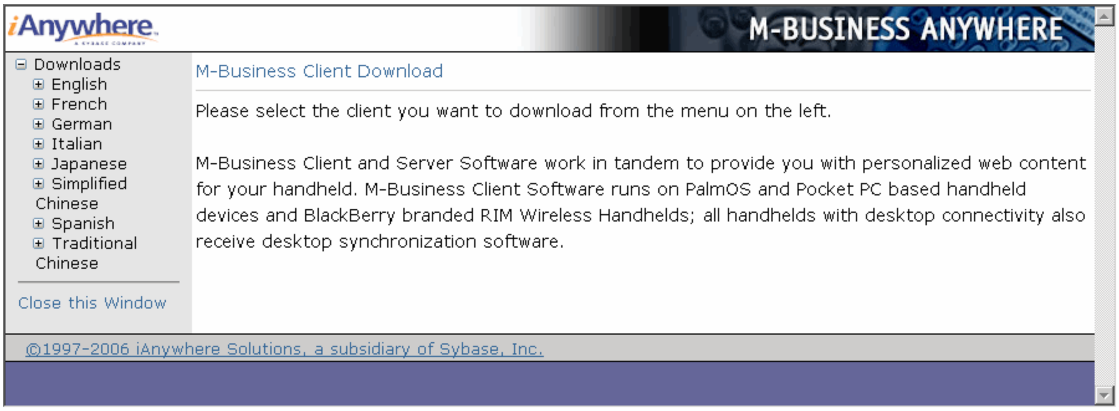
   In your browser's address field, enter **http://<servername>:8091**, replacing `<servername>` with the name of your M-Business Server machine. Your system administrator can provide you with this name.

   If your system administrator installed the server on a port other than port 8091, enter **http://<servername>:<port number>**.

The M-Business Anywhere Server login page appears.

2. Click the **Download Client Software** link.

   The M-Business Client Download page opens in a separate browser window.



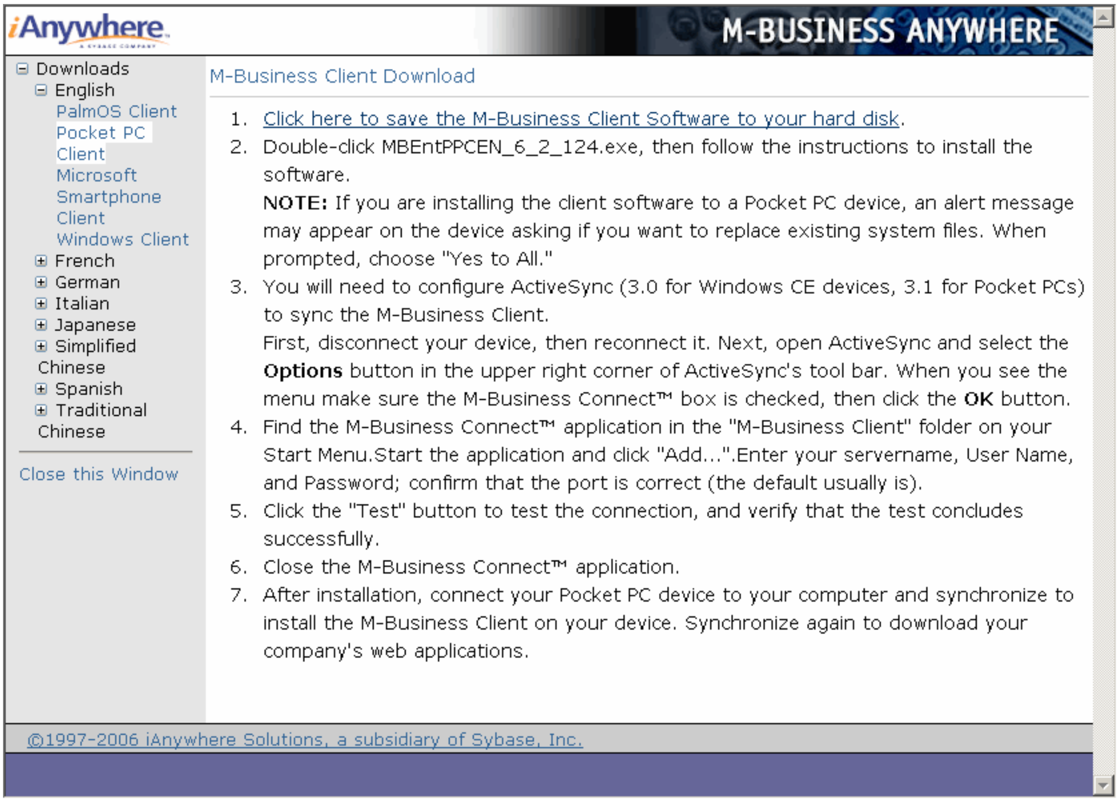
3. Click the language that you want in the panel on the left.

   A list of device clients is displayed below the language.

4. Click the link for the platform, or device operating system, that you want:

   - **PalmOS** — for any Palm OS device (*not* for Palm-branded devices running a Microsoft OS)
   - **Pocket PC** — for non-phone devices with "Pocket PC" in the branding, including Windows Mobile 5 Pocket PC devices (the installer automatically detects older Pocket PC vs. newer Windows Mobile 5 Pocket PC and installs the correct version)
   - **PPC-Smartphone** — for Microsoft Smartphone devices (does not work with other "Smartphone" devices that do not have Microsoft in the branding)
   - **Windows** — for any device with a Windows XP operating system, for example, Tablet PCs and laptops

   A page of detailed instructions is displayed.



5. Read the instructions, then click the link, **Click here to save the M-Business Client Software to your hard disk**.

   The File Download dialog appears.

6. Click **Save** to save the program to disk.

   The Save As dialog appears.

7. Select a folder into which the installer program file will be saved, then click **Save**.

   A Download dialog will show you the progress of the file transfer and display the message Download Complete when the file is copied into the folder you selected.

> **Note**
> Make sure that the **Close this dialog box when download completes** checkbox is *not* selected. If you leave this checkbox selected, you will have to manually locate the installer file on your hard disk.

8. Click **Run** to start the InstallShield Wizard.

Note
If the installer detects a secure digital (SD) card on your device, you will be prompted to install on the SD card vs. the device main memory.
On Windows Mobile 5 and 6 and Microsoft Smartphone, a dialog pops up on the *device* asking whether you want to install to the device main memory or to the SD card.
On Pocket PC, you will see a dialog on the *desktop* asking whether you want to install to the "default location" (device main memory) — if you choose NO, you will see a dialog that allows you to select the SD card as the installation target.
Be sure that you understand the issues involved before you choose to install M-Business Client on your SD card. See "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

Tip
If the Download dialog closed, you can use Windows Explorer to search for the installer file name listed in step 2 in your browser window. Double-click the installer file to continue with the next step below.

9. Follow the instructions on the screen to install M-Business Client on your desktop computer.
10. Click **OK** when you see the screen display a message telling you that M-Business Client will be installed to your device the next time you synchronize.

    You are returned to the M-Business Client Download page.

Note
M-Business Client also installs M-Business Connect on your desktop and mobile device. M-Business Connect enables M-Business Client to communicate with M-Business Server.

11. If you ran the installer file by clicking the Open button in the Download Complete dialog, you can ignore the rest of the instructions on the M-Business Client Download page.

    If you closed the Download Complete dialog without running the installer file, follow the directions on the Install screen ("Step 4 of 7") and click **Next** after you are finished.
12. Click the **Close this Window** link when the M-Business Client installer has finished.

Configuring your server connection

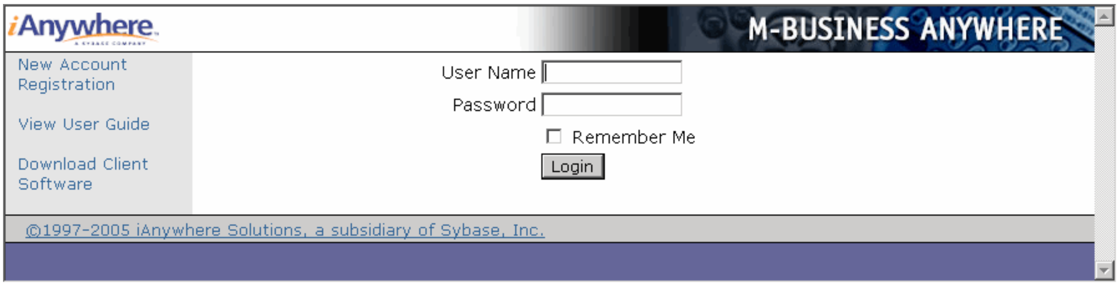
♦ To configure a new server connection

1. Start your web browser.

    In your browser's address field, enter **http://<servername>:8091**, replacing `<servername>` with the name of your M-Business Server machine. Your system administrator can provide you with this name.

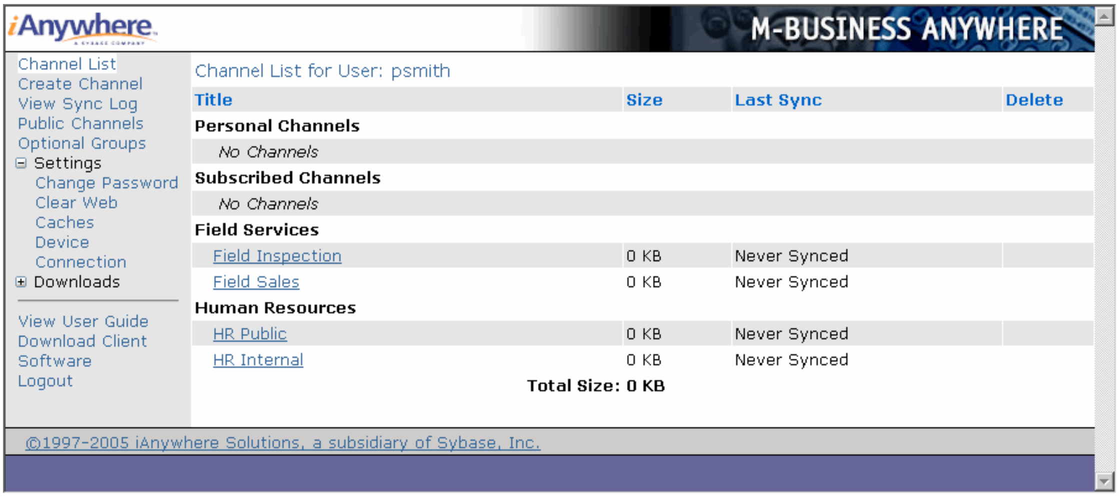
    If your system administrator installed the server on a port other than port **8091**, enter **http://<servername>:<port number>**.

The M-Business Server login page appears.



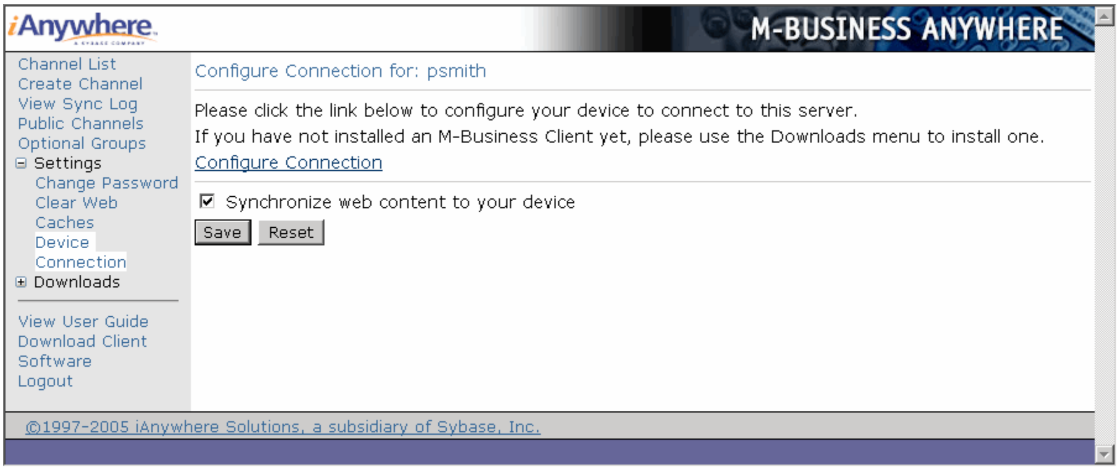
2. Enter your user name and password, then click **Login**.

Your Channel List for User...page appears.



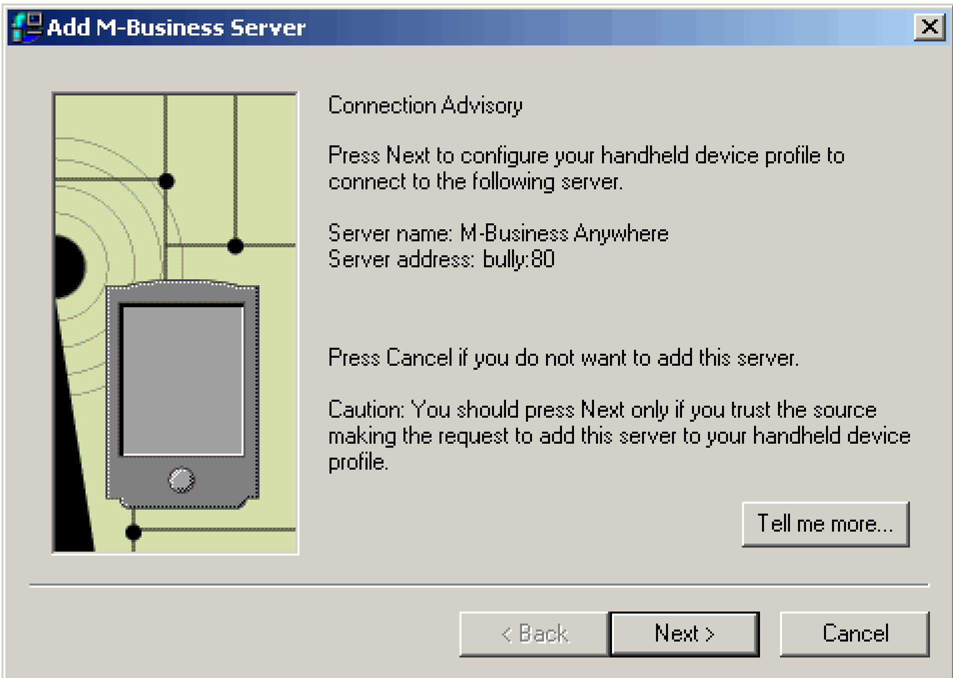
3. In the Navigation Panel on the left, click **Settings** to display the list of settings options, then click **Device Connection**.

4. The Configure Connection page is displayed.



5. Click the **Configure Connection** link.

The Add M-Business Server dialog appears.



6. Click **Next**, then follow the directions on the screens to configure your mobile device's connection to the server.

When you click **Finish** on the last step in the Add M-Business Server dialog, you are returned to the Configure Connection page.

7. Click the **Save** button at the bottom of the Configure Connection page to save your configuration settings.

Installing M-Business Client on your mobile device

M-Business Client installs on your device the next time you synchronize.

♦ To install M-Business Client on your mobile device

1. Synchronize your device.

   See the documentation that came with your device for instructions.

2. Synchronize again to download your channel content to your device.

Uninstalling M-Business Client

To uninstall M-Business Client completely, you must uninstall it from both your desktop computer and your mobile device.

To avoid losing any unsubmitted forms or changes you have made to the channel information on your device, synchronize your device before uninstalling.

Uninstalling M-Business Client from your desktop computer

> **Note**
> If you have been synchronizing your Windows XP device directly, without connecting to the Internet through another desktop computer, skip this task and go directly to "Uninstalling M-Business Client from your Windows XP device" on page 35.

♦ To uninstall M-Business Client from your desktop

1. On your desktop, choose **Start»Settings»Control Panel»Add/Remove Programs»M-Business Client»Change/Remove**. Follow the InstallShield Wizard instructions.
2. In Windows Explorer, navigate to **C:\Program Files**, then delete the **AvantGo** and **AvantGo Connect** folders and their contents.

Be sure to uninstall M-Business Client from your mobile device. See the instructions for your device in the following sections:

- "Uninstalling M-Business Client from your Palm OS device" on page 33
- "Uninstalling M-Business Client from your Windows Mobile Pocket PC device" on page 34
- "Uninstalling M-Business Client from your Windows XP device" on page 35
- "Uninstalling M-Business Client from your Windows Mobile 5 or 6 or Microsoft Smartphone device" on page 35
- "Uninstalling M-Business Client from your Symbian OS device" on page 36

Uninstalling M-Business Client from your Palm OS device

♦ To uninstall M-Business Client from your Palm OS device

1. Tap **App** on the device toolbar.
2. Tap **Delete**.

   The Delete screen appears.

3. Tap to select **M-Business**, tap **Delete**, then tap **Yes**.
4. Tap to select **MBConnect**, tap **Delete**, then tap **Yes**.
5. Tap to select **libmal**, tap **Delete**, then tap **Yes**.

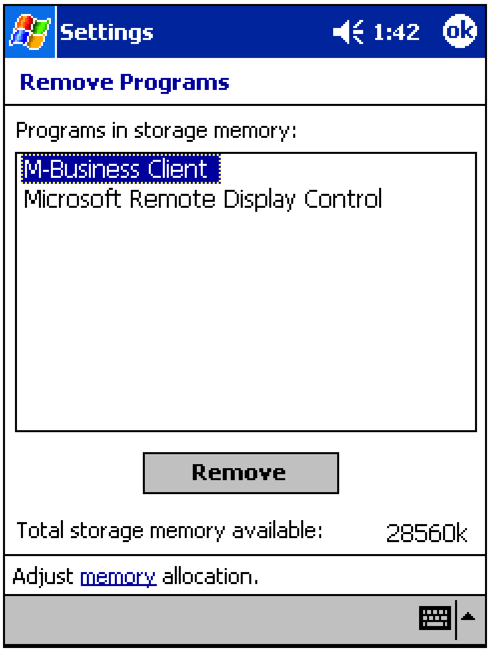
Uninstalling M-Business Client from your Windows Mobile Pocket PC device

♦ **To uninstall M-Business Client from your Windows Mobile Pocket PC device**

1. Tap **Start»Settings**, then tap the **System** tab.
2. Tap **Remove Programs**.

   The Remove Programs screen appears.
3. Select **M-Business Client**, tap **Remove**, then tap **Yes**.
4. Tap **OK**.

   The Remove Program screen appears.



Uninstalling M-Business Client from your Windows XP device

> **Note**
> If you have been synchronizing your Windows XP device directly, without connecting to the Internet through another desktop computer, this is the only task you need to perform to remove M-Business Client.

♦ To uninstall M-Business Client from your Windows XP device

1. On your Windows XP device, choose **Start»Settings»Control Panel»Add or Remove Programs**.
2. Scroll down and select the line for M-Business Client, then tap or click the **Change/Remove** button.
3. Follow the Installshield Wizard instructions.

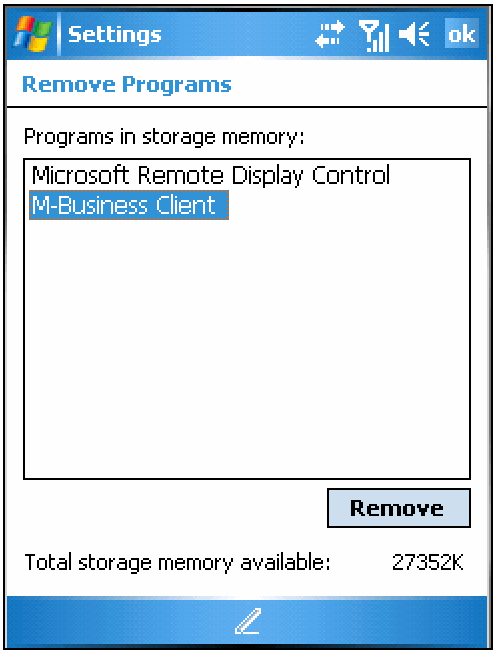
Uninstalling M-Business Client from your Windows Mobile 5 or 6 or Microsoft Smartphone device

> **Note**
> If you have been synchronizing your Windows Mobile 5 or 6 or Microsoft Smartphone device directly, without connecting to the Internet through another desktop computer, this is the only task you need to perform to remove M-Business Client.

♦ To uninstall M-Business Client from your Windows Mobile 5 or 6 or Microsoft Smartphone device

1. Tap **Start»Settings**, then choose the **System** tab.
2. Choose **Remove Programs**.

   The Remove Programs screen appears.



3. Select **M-Business Client**.
4. Remove M-Business Client:

   - **Windows Mobile 5 or 6** — choose **Remove**, then choose **Yes**, then **OK**.
   - **MS Smartphone** — choose **Menu»Remove**, then choose **Yes**, then **OK**.

Uninstalling M-Business Client from your Symbian OS device

> **Note**
> On Symbian OS devices, this is the only task you need to perform to remove M-Business Client.

♦ To uninstall M-Business Client from your Symbian OS device

1. Choose**Applications»My Own**.

2. Select the **M-Business** icon.
3. Choose **Options»Remove**.
4. Confirm the removal when you are prompted.

Part III. M-Business Client on the Desktop

CHAPTER 3

Configuring M-Business Client on the desktop computer

Contents

Note
The information in this chapter applies to all M-Business Client platforms that have the capability to synchronize through a cradle that is connected to your computer. Currently, in M-Business Anywhere version 6.7, Microsoft Smartphone is the only platform that does *not* require you to configure M-Business Client on the desktop.

Accessing your M-Business Server account

On your computer desktop, you can access your M-Business Server account to change your password or channel settings.

You can access the M-Business Server Administrator Console from your desktop computer's Web browser or from within M-Business Connect. You must already have a user name and password in order to log in to M-Business Server.

If the user name you use to log in is not defined as a system administrator or a group administrator, you are automatically placed in personal mode in the M-Business Server Administrator Console. In personal mode you are able to perform only a limited set of operations that are available to you as an ordinary user to manage your own account.

If the user name you use to log in is defined as a group administrator, you are automatically placed in group administrator mode in the M-Business Server Administrator Console. In group administrator mode you are able to perform group administration functions, in addition to managing your own account.

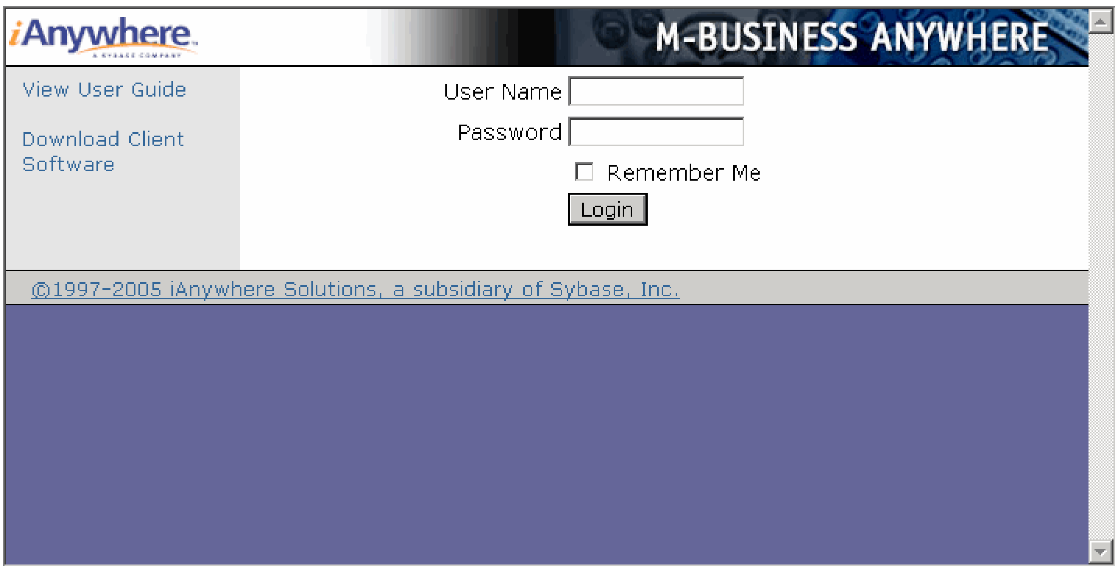
♦ To access the M-Business Server Administrator Console though a Web browser

1. Start your web browser.

   In your browser's address field, enter **http://<servername>:8091**, replacing `<servername>`with the name of your M-Business Server machine. Your system administrator can provide you with this name.

   If your system administrator installed the server on a port other than port 8091, enter **http://<servername>:<port number>**.

   The M-Business Server login page displays.



2. Enter your user name and password, then click **Login**.

Accessing the M-Business Server Administrator Console though M-Business Connect

You also can access the M-Business Server Administrator Console in personal mode though M-Business Connect on your desktop computer.

♦ To access the M-Business Server Administrator Console though M-Business Connect

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Select the name of your server, then click **Content**.

   The M-Business Server login page displays.

3. Enter your user name and password, then click **Login**.

Setting server information

This section describes how to configure M-Business Connect. When you install M-Business Client, M-Business Connect installs automatically on your desktop computer. If you use a Palm OS, Windows Mobile Pocket PC, Windows Mobile 5, or Windows XP device, M-Business Connect also installs on your mobile device. This software allows you to synchronize your device's data with a remote server.

Manually configuring a new server connection

Follow the instructions listed below to manually configure a new server connection using M-Business Connect.

Note
You also can configure your server connection in personal mode on in the M-Business Server Administrator Console. See "Configuring your server connection" on page 29.

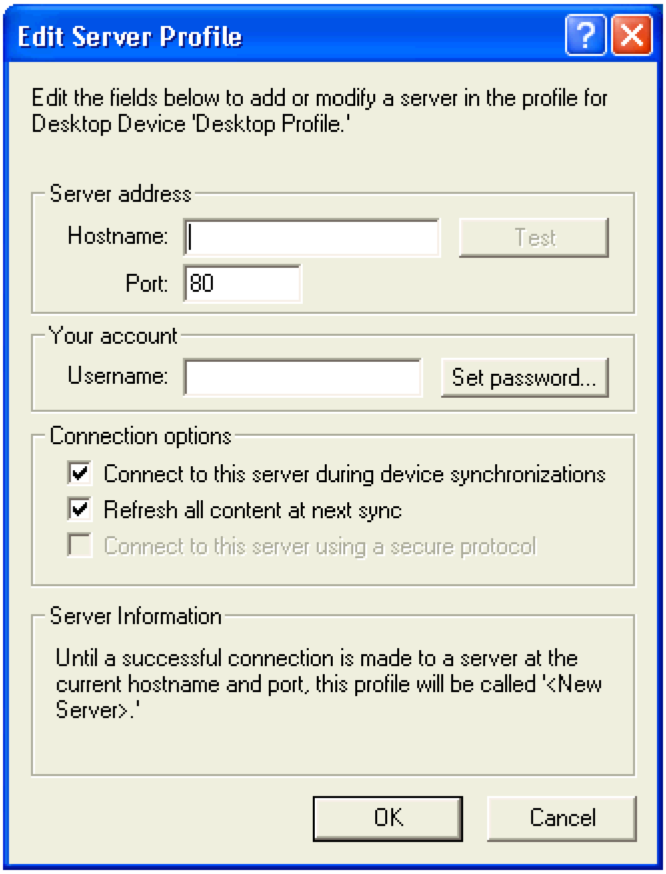
♦ To configure a new server connection

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, click the **Add** button.

   The Edit Server Profile dialog displays.



3. Enter the fully qualified host name of your server.

> **Note**
> A host name is fully qualified if it includes the full path to the host server, for example, **enterprise.example.com**.

This is not a URL, so do not include a protocol prefix such as http://.

4. Enter the port number.

   The default value of 80 is usually correct. If do not know your server's port number, check with your system administrator.

5. Click the **Test** button.

   M-Business Connect tries to establish a connection with the server. If the test is not successful, contact your system administrator.

6. In the Edit Server Profile dialog, enter your user name.

7. Click the **Set Password** button, enter your password, then click **OK**.

8. Select the connection options that you want to use.
9. Click **OK**.

Editing a server connection

♦ To edit a server connection

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect**or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Properties**, or double-click on the name of the server.

   The Edit Server Profile dialog displays.

4. Select the connection options that you want to use.
5. Click **OK**.

Refreshing all content from a server

If a synchronization has failed, or if you are uncertain whether content was preserved during an upgrade, you can check the **Refresh all content at next sync** checkbox to re-establish your content.

The **Refresh all content** setting overrides all of your other channel settings. For example, if you set M-Business Server to refresh a channel's content only once a week, then select **Refresh all content** in M-Business Connect, the next synchronization will refresh all of the channel's content.

> **Note**
> Setting M-Business Connect to refresh all content will affect only your next synchronization. If you want to change a channel's setting permanently, do so on your Edit Channel page on M-Business Server. See the Refresh (group and personal channels only) topic in the "Managing channels on the desktop computer" on page 57 chapter.

♦ To enable a server to refresh all content

1. Choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Properties**, or double-click on the name of the server.

The Edit Server Profile dialog displays.

4. Check the **Refresh all content at next sync** checkbox.
5. Click **OK**.

Changing your password

Changing your password is a two-step process:

- First, change your password in your personal page on M-Business Server.
- Second, update M-Business Connect with the new password.

You must complete both of these steps or M-Business Connect will fail to connect to M-Business Server the next time you synchronize.

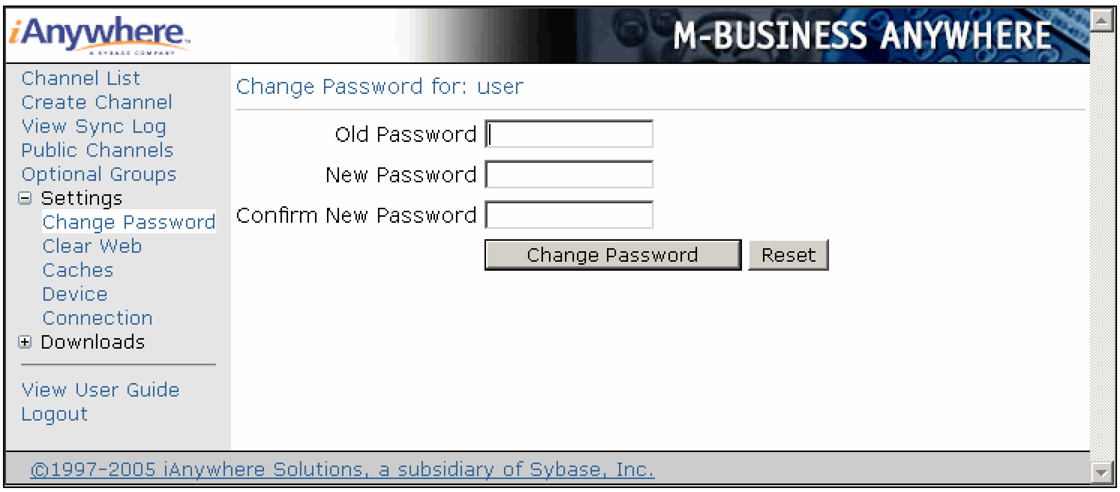
Note
If M-Business Server is integrated with a Windows NT domain, your password must be the same as your Windows domain password.

Changing your password in M-Business Server Administrator Console

♦ To change your password in M-Business Server Administrator Console

1. Access your M-Business Server personal page.
2. Click **Your Account**.

   The Change Password page displays.



3. Enter your current password in the **Old Password** field.
4. Enter your new password in the **New Password** and **Confirm New Password** fields.
5. Click **Save**.

Updating your password in M-Business Connect

♦ To update your password in M-Business Connect

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Properties**, or double-click on the name of the server.

   The Edit Server Profile dialog displays.

4. Click the **Set password** button.

   The Change Password dialog displays.

5. Enter your new password in the **New password** field, then click **OK**.
6. In the Edit Server Profile dialog, click **OK**.

Configuring proxy server settings

If you are having trouble accessing the Internet from behind a firewall, you may need to configure a connection to a proxy server.

A proxy server is a computer located between a user and a network. It can be used as a relay to speed up a network by keeping a list of frequent requests, as part of a gateway system that connects two different networks, or as part of a firewall that protects a network from security breaches.

During installation, M-Business Connect mirrors your desktop browser's configuration. If your browser settings are incorrect, if you want to connect to a different proxy server, or if M-Business Connect is unable to find your desktop browser configuration, you may need to detect or configure proxy server settings.

If you are unsure of what settings to use, contact your system administrator.

Using Microsoft Internet Explorer proxy settings

To connect to M-Business Server using Microsoft Internet Explorer proxy settings, you must detect the connection on your desktop.

♦ To use Microsoft Internet Explorer proxy settings

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Click the **Connection** tab.
3. Select **Microsoft® Internet Explorer**.
4. Click **Autodetect now**.

   M-Business Connect attempts to detect your settings.

   If Autodetect is successful, click **Done**, then click **OK**.

   If Autodetect is not successful, contact your system administrator.

> **Note**
> To see details of your connection attempt, click **Show Details**. To save the details to send to your system administrator, click **Copy Log to Clipboard**, then paste the information into your preferred text editor or email application.

Using HTTP or secure proxy server settings

If your desktop computer accesses the Internet through a proxy server, and if you connect through a proxy server to all servers that you access with M-Business Connect (the most common case), you can detect your proxy server connection using Autodetect.

If you have never set up your desktop computer for Internet access, if some of the servers you access with M-Business Connect should use proxy settings, while others should not, or if Autodetect is unsuccessful, you cannot use Autodetect. You must add your proxy server connection manually.

Detecting a proxy server connection

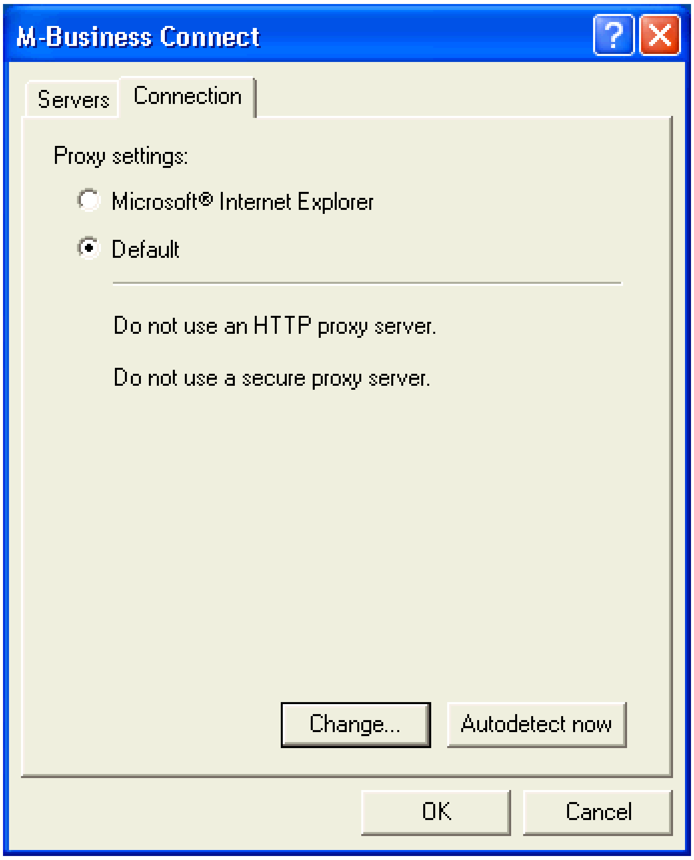
♦ **To detect a proxy server connection**

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Click the **Connection** tab.

   The Connection tab is activated.



3. Select the type of proxy settings you want to use.
4. Click **Autodetect now**.

   The Autodetect Network Connection dialog displays.
5. If successful, click **Done**.
6. If unsuccessful, click **Detect Again** to retry.

   If the second attempt is unsuccessful, contact your system administrator.

> **Note**
> To see details of the connection attempts, click **Show Details**. If you want to save the details to send to your system administrator, click **Copy Log to Clipboard**, then paste the information into your preferred text editor.

Adding a proxy server connection manually

♦ To add a proxy server connection manually

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Click the **Connection** tab, then click **Change**.

   The Advanced Connection Settings dialog displays.

   Note
   Your system administrator has all the necessary information for you to enter.

3. If your proxy server uses the HTTP protocol, enter information in the **HTTP Address** and **Port** fields.

   Note
   The HTTP Address field assumes a protocol prefix such as http://. It is not necessary to enter this prefix as part of the HTTP address.

   Note
   URLs entered in any M-Business Anywhere component must contain only forward slashes (/). The backslash character (\) in place of a forward slash will cause an error.

   When you enter information in the **Port** field, the **Use HTTP authentication** field is enabled.

4. To enable user name and password protection, check the **Use HTTP authentication** checkbox.

5. If you enable **Use HTTP authentication**, enter your user name and password for the server you entered in the **Address** field.

6. Enter information in the **Secure** and **Port** fields if your proxy uses a secure protocol.

7. Enter exceptions to the HTTP settings in the **text** field under "Do not use proxies for these servers."

   Note
   Exceptions are the host names of servers that M-Business Connect should access without going through the proxy server.

8. Click **OK**.

   The final screen summarizes the proxy settings you have chosen.

Enabling a secure connection to a server

Depending on how your system administrator has configured M-Business Server, you may be able to enable and disable security between M-Business Server and M-Business Client. For information on your company's security policy, contact your system administrator.

When you enable a secure connection to a server, M-Business Connect can use the HTTPS protocol to connect to the server. You can connect to M-Business Server using the secure protocol only if:

- Your system administrator has enabled the use of secure protocols on M-Business Server.
- You have entered a secure server in the **Hostname** field in M-Business Connect on your desktop computer, Windows XP device, or Windows Mobile Pocket PC device, or in the **Server Addr** field on your Palm OS device.
- You have synchronized your mobile device at least once with the secure server.

♦ To enable a secure connection

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Properties**, or double-click on the name of the server.

   The Edit Server Profile dialog displays.

4. Check the **Connect to this server using a secure protocol** checkbox.

   > **Note**
   > This checkbox is enabled only after the server in the **Hostname** field confirms that it can provide a secure connection to the device. The server confirms this during the first synchronization, or when you test the connection by clicking the **Test** button in the Edit Server Profile dialog.

5. Click **OK**.

Disabling and removing server connections

Disabling and re-enabling a server connection

By default, any new server connection you create is enabled.

M-Business Connect allows you to disable a server connection temporarily without deleting it. Because your device will not synchronize a server's content when the connection is disabled, this feature can help to increase available memory on your device.

> **Note**
> If you will never access a server again, you may choose to remove its connection permanently. See "Removing a server connection" on page 55.

♦ To disable or re-enable a server connection

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Properties**, or double-click the name of the server.

   The Edit Server Profile dialog displays.

4. Clear the **Connect to this server during device synchronizations** checkbox.
5. Click **OK**.

   When you want to synchronize with this server again, check the **Connect to this server during device synchronizations** checkbox.

Disabling the M-Business Connect conduit

The M-Business Connect conduit is the path for information between M-Business Server and M-Business Client. When this conduit is disabled, M-Business Client cannot synchronize with M-Business Server.

If you use a Palm OS, Windows Mobile Pocket PC, or Windows XP device, and if you want to synchronize your device without refreshing any of your M-Business Client content, you can disable the conduit. See:

- For Palm OS — "Disabling the M-Business Connect conduit" on page 91
- For Window Mobile Pocket PC — "Disabling the M-Business Connect conduit" on page 133
- For Windows XP — "Disabling and re-enabling a server connection" on page 175

- For Windows Mobile 5 or Microsoft Smartphone — “Disabling the M-Business Connect conduit” on page 216

Removing a server connection

♦ To remove a server connection

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. On the **Servers** tab, select your server from the **Server settings** list.
3. Click **Remove**.

   The Confirm server removal dialog displays.

4. Click **OK**.

Using M-Business Connect help

In M-Business Connect on your desktop computer, you can access both desktop help and context-sensitive help.

Desktop help, in HTML-based format, provides instructions on working with server connections, both on your desktop and from your mobile device. If you use a Windows Mobile Pocket PC device, you also can use on-device help. See “Using on-device help” on page 163.

Context-sensitive help is a feature of the M-Business Connect dialog. It provides brief descriptions of the functions that the buttons and fields perform.

Accessing online help

♦ **To access online help**

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Click **Help**.

   M-Business Connect help displays. You can select the topic that you want to review.

Accessing context-sensitive help

♦ **To access context-sensitive help**

1. On your desktop, choose **Start»Programs»M-Business Client»M-Business Connect** or **Start»Settings»Control Panel»M-Business Connect**.

   The M-Business Connect dialog displays.

2. Click the **question mark** icon in the upper right corner of the application interface.
3. Click on any button or field in M-Business Connect to see information about the function of that button or field.

CHAPTER 4

Managing channels on the desktop computer

Contents

Managing channels

Channels are web content, optimized for use on your mobile device, that M-Business Server delivers to your device. There are three categories of channels:

- ♦ Public channels are available to all users. If your system administrator has defined public channels, you can browse and select public channels to add to your device.

  If your system administrator makes any changes to a public channel to which you are subscribed, you will download those changes when you synchronize.

- ♦ Group channels are for use by a specific group of users. Note that some channel groups are optional, while others are not. If your system administrator has defined optional channel groups, you can browse and select channel groups to join. By joining a channel group, you add all associated channels to your device.

  If your system or group administrator makes any changes to a channel associated with a group to which you belong, you will download those changes when you synchronize.

- ♦ Personal channels are for use by a specific individual user. If your system administrator has enabled personal channels, you can create personal channels for yourself.

Adding or removing a public channel

♦ To subscribe to or remove a public channel

1. Access your M-Business Server personal page.
2. Click the **Browse Public Channels** link.

   The Browse Public Channels page displays. You can review channels by categories, or search by keyword.
3. To subscribe to a channel, click the **add Channel** button.

   To remove a channel, click the **remove Channel** button.
4. Synchronize your device.

   See the documentation that came with your mobile device for instructions.

Joining and leaving channel groups

Some or all of your group channels may be optional. You may enter or leave optional groups when you choose. You can join or leave a group from your desktop only.

> **Note**
> Your system administrator may designate you as a group administrator. As a group administrator, you can add and remove users from your assigned group, create channels for your group, and modify group channel properties. See "Managing groups" [*M-Business Anywhere Administrator Guide*].

♦ To join or leave an optional channel group

1. Access your M-Business Server personal page.
2. Click the **Optional Groups** link.

   The Optional Group Membership page displays.
3. To join a group, click to select the checkbox in the Member column corresponding to the Group Name.

   To leave a group, click to clear the checkbox in the Member column corresponding to the group name.
4. Click **Save**.

   The message "Changes successfully saved" displays.

Adding a personal channel

If your system administrator has enabled personal channels, you can create and delete personal channels for yourself. When you create a personal channel, you set properties for web content that you want to view on your device.

Title

Identifies the channel. The title of the channel's main page usually is a good choice.

Location

Identifies the channel's URL or file location. A URL must be an Internet website or a site on your corporate intranet.

In the **Location** field, enter the URL of the home page of your channel Website.

> **Note**
> URLs entered in any M-Business Anywhere component must contain only forward slashes (/). The backslash character (\) in place of a forward slash will cause an error. When you are setting up directories in a Windows file system, where backslashes separate levels, be sure to change these characters to forward slashes if you copy parts of the file system path into a URL.

Channel Size Limit

The maximum size in kilobytes (KB) that the entire channel can consume on a device. M-Business Server compresses web pages for efficiency: The size limit reflects the compressed size, not the original size.

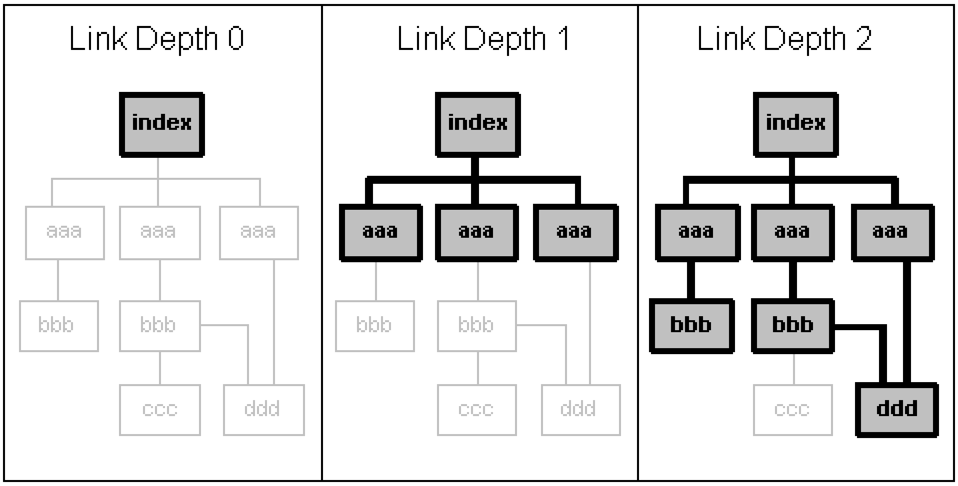
Some channels are very large and consume a large portion of the available memory on a mobile device. By entering a size limit, you prevent the channel from growing beyond that limit.

If a channel's pages total up more than the size you specify here, some pages will not be downloaded in a synchronization. 100KB should be a large enough size limit for getting started with your first channel.

Note
The Channel Size Limit setting works together with the Link Depth setting. If Channel Size Limit is reached first, it supersedes Link Depth. If Link Depth is reached first, it supersedes Channel Size Limit.

Link Depth

Specifies the number of levels of links to follow from the channel's main page. If you set this to 0, for example, M-Business Sync Server returns only the page for the main location of the channel. If you set this to 1, it follows the links on the main page and downloads all of those pages as well. The greater the link depth, the more pages your channel downloads, which consumes more memory. It is rarely a good idea to set the link depth to greater than 1 or 2.



Set the Link Depth to the level beyond the channel's home page that should be downloaded in a synchronization.

Note
The Channel Size Limit setting works together with the Link Depth setting. If Channel Size Limit is reached first, it supersedes Link Depth. If Link Depth is reached first, it supersedes Channel Size Limit.

Include Images

Controls whether images are omitted from a channel. Deselecting this option reduces the memory that a channel consumes. If you deselect this option, your device will not download images, even if they are on a **Handheld Friendly** page.

Color Depth (group and personal channels only)

Sets the allowed color depth for a channel's images. The default selection is **Automatic**, which downloads color images to the device with the highest color depth that the device can support. Select a different setting to cap the color depth at a lower level and prevent images from exceeding channel capacity on devices that support greater color depth.

The following Color Depth options are available:

- **Black & White** (1-bit)
- **Greyscale** (2-bit)
- **16 Colors** (4-bit)
- **256 Colors** (8-bit)
- **High Color** (16-bit)

Lowering the number of bits allowed reduces synchronization time and saves memory on your device.

Follow Offsite Links

If your **Link Depth** is set to 1 or higher, indicates whether your channel should include pages from a server other than the one on which the main page of your channel resides. An offsite link is:

- any URL outside of the original HTTP site's domain
- a different machine name, even if the machine is in the same domain
- any link that is a re-direct

Including offsite links increases the number of pages the channel downloads to your device. Turning off this option saves memory on your mobile device.

Sync Only

Check the **Sync Only** box if you want the channel content never to expire on the device. You would only do this with a channel that you expect have unchanging content over an extended period of time. Checking Sync Only for such a channel eliminates most of the communication with the web server that is required to determine if the web pages on the device need to be updated.

With connected users, this decreases the time it takes to synchronize the device. With wireless users, it decreases the time it takes to display the page every time the user accesses it — wireless users are more likely to notice the difference.

Refresh (group and personal channels only)

Check the **Refresh** setting to specify the frequency of on-device channel updates.

Table 1. Refresh options

Refresh option	Behavior	Reasons users might prefer this option
Only once	Synchronize one time, but never again.	Synchronizing a binary program file, reference guide, or template.
Every sync	Update sets of pages that change more than once a day by enabling a synchronization of the channel during every device synchronization.	Checking on the latest press release, stock price, or news articles.
Only once every <x> hours	Update once every <x> hours daily, or **only on weekdays**. The **Only once every <x> hours** option synchronizes and then disappears until the next synchronization time period starts. After a synchronization, this method does not synchronize again until the specified hourly period has passed.	Keeping track of stock quotes that change regularly.
Daily at <time>	Update at specific times during the day. The daily refresh option synchronizes and then disappears until the next daily time period starts. After synchronizing using this method, the channel will not synchronize again until the next day and time.	Viewing a daily newsletter posted at a particular time.
Days of the week	Checking only those days of the week on which the **Daily at <time>** synchronization should occur restricts synchronizations to those days.	Viewing pages that change once a week or even less frequently, such as particular websites or reference materials.

You can add or remove a personal channel from your mobile device. However, if you later want to modify your channel properties, or set color depth or refresh properties, you must do so from your desktop. See "Managing channels on the desktop computer" on page 57.

To set color depth and refresh properties at the same time that you create a channel, you must create the channel on your desktop, using the M-Business Server Create Channel option.

♦ To set color depth and refresh properties at the same time that you create a channel

1. Start your web browser.

   In your browser's address field, enter **http://<servername>:8091**, replacing `<servername>`with the name of your M-Business Server machine. Your system administrator can provide you with this name.

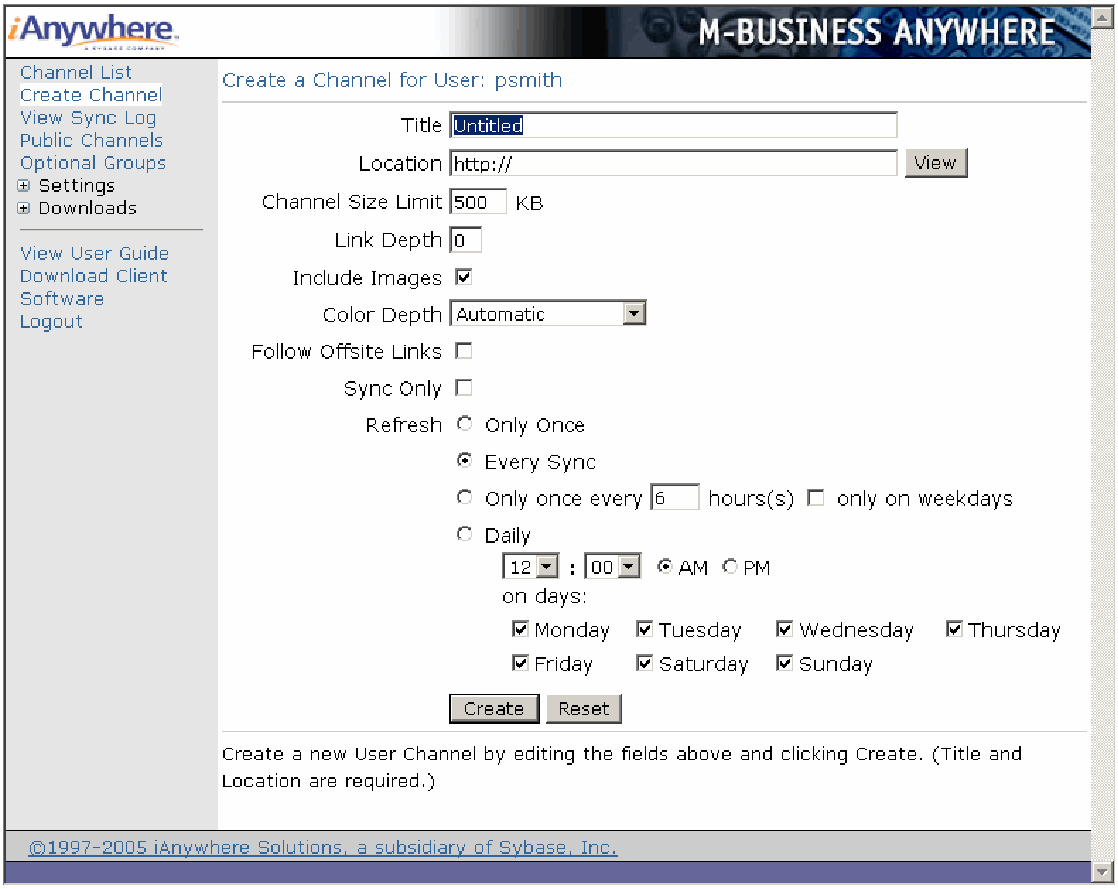
If your system administrator installed the server on a port other than port 8091, enter **http://<servername>:<port number>**.

2. Enter your user name and password, then click **Login**.

   Your Channel List displays.

3. Click **Create Channel**.

   The Create a Channel for User form displays.



4. Enter the information for the new channel.

Note
URLs entered in any M-Business Anywhere component must contain only forward slashes (/). The backslash character (\) in place of a forward slash will cause an error.

> **Note**
> After you enter a URL in the **Location** field, click **View** to make sure that the URL does not automatically redirect to another site. For example, if **example.com** redirects to **example.org**, enter `http://www.example.org` in the **Location** field. Otherwise, you may not receive the linked pages that you specify in the **Link Depth** field.

5. Click **Create**.

   The next time you synchronize, the channel will appear on your device.

Modifying personal channel settings

From your desktop, you can change any of the properties of your personal channels. See "Adding a personal channel" on page 59.

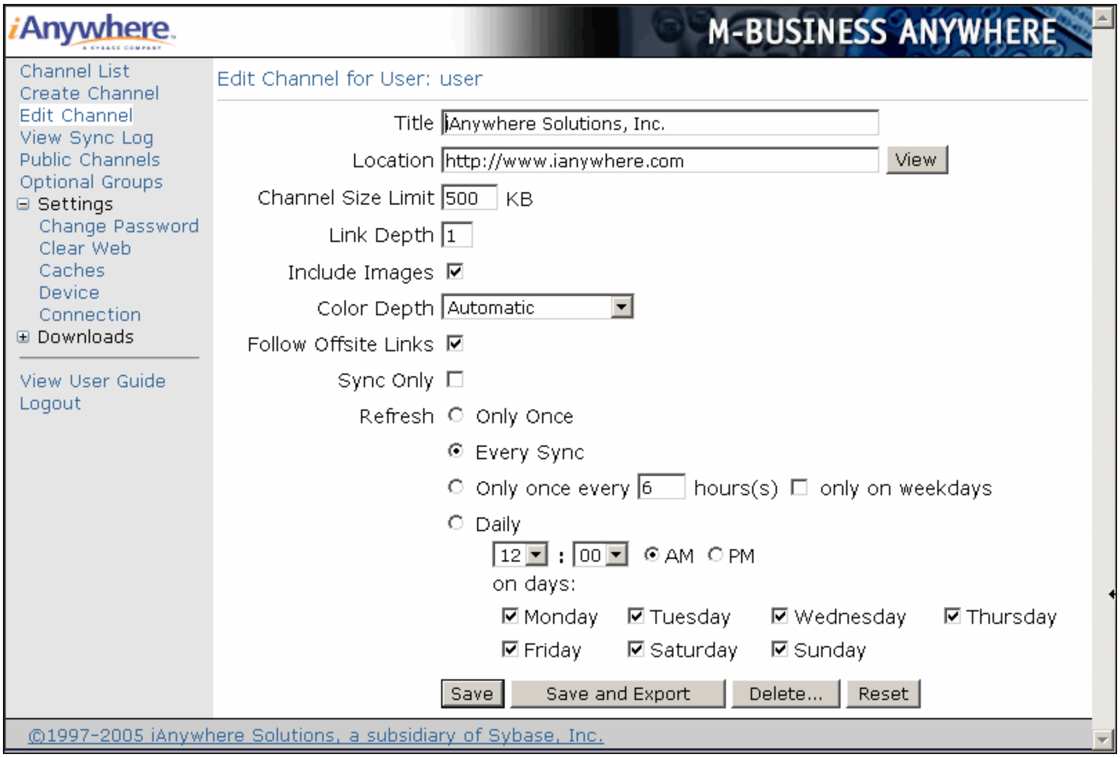
♦ To modify your personal channel settings

1. Access your M-Business Server personal page.

   The Channel List page is displayed when you log in.

2. Click the title of the personal channel that you want to modify.

   The Edit Channel for User page displays.



3. Set your channel properties.

4. Click **Save**.

   The next time you synchronize, the channel on your device will reflect your changes.

Note
If a synchronization has failed, or if you are uncertain whether content was preserved during an upgrade, you might need to refresh all data from a server. See "Refreshing all content from a server" on page 46.

Removing a personal or public channel

You can delete a personal or public channel from your desktop. The channel will be removed from your device the next time you synchronize.

Note
If you want to unsubscribe from, or delete, a group channel, contact your system administrator.

♦ To remove a personal or public channel from your desktop

1. Start your web browser.

In your browser's address field, enter **http://<servername>:8091**, replacing `<servername>`with the name of your M-Business Server machine. Your system administrator can provide you with this name.

If your system administrator installed the server on a port other than port 8091, enter **http://<servername>:<port number>**.

2. Enter your user name and password, then click **Login**.

   Your Channel List for User page displays.

3. Locate the title of the channel that you want to remove, and click **Delete** in the row for that channel.

   A dialog box displays prompting you to confirm that you want to delete the channel.

4. Click OK.

   The channel is removed from the Channel List. The next time you synchronize, the channel will be removed from your mobile device.

Temporarily clearing a channel's contents

Use the Channel Manager on your handheld device to temporarily clear all pages associated with a channel from your device. This feature allows you to recover device memory.

For instructions, see one of the following sections:

- For Palm OS — "Temporarily clearing a channel's contents" on page 95,
- For Windows Mobile Pocket PC — "Temporarily clearing a channel's contents" on page 139
- For Windows XP — "Temporarily clearing a channel's contents" on page 179
- For Windows Mobile 5 or Microsoft Smartphone — "Temporarily clearing a channel's contents" on page 221

Updating channel pages

To update your channel pages, all you need to do is to synchronize your mobile device. Place your device in its cradle, connect it to the desktop, then synchronize. When the synchronization is complete, your device has the latest channel information.

If your mobile device has a modem, network, or wireless connection, you can synchronize M-Business Client without using a desktop cradle. See “Remote connections” on page 76.

Tip
If you have trouble synchronizing M-Business Client, see Appendix “Troubleshooting” on page 285.

Accessing secure channels

When you try to access a secure channel, M-Business Client may display an Authorization Required notifier.

This notifier indicates you are trying to access a channel that is secured by a Microsoft Windows NT LAN Manager (NTLM) or Basic Authentication protocol.

♦ To access a channel that is secured by a Windows NTLM or Basic Authentication protocol

1. Enter the domain name of the site you want to access, then enter your user name.

> **Note**
> Unix-based servers do not use domain authentication. If you are accessing a Unix-based server that authenticates, simply enter your user name.

2. Enter your assigned password.
3. Click **OK**.
4. Synchronize your device.

See the documentation that came with your mobile device for instructions.

CHAPTER 5

Using M-Business Client on a device

Contents

Using platform-specific features with M-Business Client

In general, M-Business Client works with platform-specific features, such as landscape mode, just like any other application on your mobile device. In such cases, no instructions are provided in the chapters for your device. See the documentation that came with your device to determine how to use its platform-specific features.

In a few cases where M-Business Client does not use a platform-specific feature just like any other application, this is noted in the chapters for your device. For example, on all Windows Mobile 5 devices — as well as on certain Windows Mobile Pocket PC devices — that have a hardware keyboard, M-Business Client installs with the SIP disabled; only the hardware keyboard can be used to enter text. If you wish to use the SIP and stylus instead, you can switch to that input mode.

Using M-Business Client with multiple servers

You can have accounts on multiple instances of M-Business Server. M-Business Client will access content from only one server at a time. When you switch between servers, you will see the server home page for each server and a different list of channels for each server. M-Business Client will display the home page for the server, rather than a channel page.

To add an additional server configuration to M-Business Client, see "Manually configuring a new server connection" on page 44.

For instructions on switching servers:

- For Palm OS — "Selecting the server that delivers content" on page 100.
- For Windows Mobile Pocket PC — "Selecting the server that delivers content" on page 144.
- For Windows XP — "Selecting the server that delivers content" on page 183.
- For Windows Mobile 5 or Microsoft Smartphone — "Selecting the server that delivers content" on page 227.

Tip
If you use M-Business Client with multiple servers, M-Business Connect will access each server when you synchronize, potentially making synchronizing a very long operation. If you choose not to synchronize with every server and want to disable a server connection temporarily, see "Disabling and re-enabling a server connection" on page 54.

Using HTML forms

M-Business Client handles forms differently in online and offline modes.

Submitting HTML forms while offline

In offline mode, M-Business Client saves form submissions on the device in the Forms Manager. When you synchronize, M-Business Client sends the saved form submissions to their associated Websites, then the Websites send back responses. Depending on the form, you can view the Website's response either in the channel from which you submitted the form or in the Forms Manager.

For instructions on submitting HTML forms and displaying the responses, see one of the following sections:

- For Palm OS — "Submitting HTML forms while offline" on page 106
- For Windows Mobile Pocket PC — "Submitting HTML forms while offline" on page 149
- For Windows XP — "Submitting HTML forms while offline" on page 188
- For Windows Mobile 5 or Microsoft Smartphone — "Submitting HTML forms while offline" on page 232

Submitting HTML forms while online

In online mode, M-Business Client immediately sends the form request to the Website and you get back an immediate response.

For instructions on submitting HTML forms while online, see one of the following sections:

- For Palm OS — "Submitting HTML forms while online" on page 109
- For Windows Mobile Pocket PC — "Submitting HTML forms while online" on page 152
- For Windows XP — "Submitting HTML forms while online" on page 192
- For Windows Mobile 5 or Microsoft Smartphone — "Submitting HTML forms while online" on page 235

Using the Forms Manager

Use the Forms Manager to view the condition (pending or successful) of your form request(s) and to look at response page(s). The Forms Manager provides a series of columns, each of which provides information about the form in the Forms Manager queue.

Table 1. Forms Manager properties

Col-umn	Item	Displays	Indicating
1	Checkbox	Checkmark or no check-mark	When checked, the form is selected for deletion
2	Time of submission	Timestamp (after 24 hours becomes a date stamp)	The time or date the form was submitted to the Forms Manager queue
3	Title	The linked name of the form	The title listed in the form's header is linked to the full form; tap the linked title to view the form
4	Status	Pending or success	The condition of the form

For instructions on accessing the forms manager, editing and deleting forms, see one of the following sections:

- For Palm OS — "Using the Forms Manager" on page 107
- For Windows Mobile Pocket PC — "Using the Forms Manager" on page 150
- For Windows XP — "Using the Forms Manager" on page 190
- For Windows Mobile 5 or Microsoft Smartphone — "Using the Forms Manager" on page 233

Using forms with websites that require password authentication

Some Websites require that you provide a user name or password before you can access their content.

The following procedures describe how to access either a secure (https) or a non-secure (http) channel that requires a password and uses a cookie.

Accessing a secure (https) website

♦ To access a secure (https) website

1. In M-Business Connect, select the **Connect to this server using a secure protocol** option.
2. Synchronize your device.

   See the documentation that came with your mobile device for instructions.
3. On your device, access the channel that requires authentication.
4. Enter your password or other authentication information.
5. Tap **Enter** or **OK**.

6. Synchronize your device or perform a wireless page fetch.

   See the documentation that came with your mobile device for instructions.

   The channel displays.

Accessing a non-secure (http) website

♦ To access a non-secure (http) website

1. Synchronize your device.

   See the documentation that came with your mobile device for instructions.

2. Access the channel that requires authentication.
3. Enter your password or other authentication information.
4. Tap **Enter** or **OK**.
5. Synchronize your device or perform a wireless page fetch.

   The channel displays.

> **Note**
> If you are trying to access a site and see a **Page Not Available** notifier, you may be trying to access a site that is secured by a Windows NT LAN Manager (NTLM) or Basic Authentication protocol. To access a site secured by one of these protocols, see "Accessing secure channels" on page 68.

Searching to find content in M-Business Client

You can search content in M-Business Client on your mobile device.

When you perform a search for specific content while M-Business Client is the active application, you search only M-Business Client channel pages. Your search does not include pages in the Forms Manager or Online Cache, nor does it include information in other applications, such as your address book or calendar.

For instructions on performing searches, see one of the following sections:

- For Palm OS — "Searching to find content in M-Business Client" on page 102
- For Windows Mobile Pocket PC — "Searching to find content in M-Business Client" on page 145
- For Windows XP — "Searching to find content in M-Business Client" on page 184
- For Windows Mobile 5 or Microsoft Smartphone — "Searching to find content in M-Business Client" on page 228

Remote connections

Synchronizing remotely

If you use a Palm OS, Windows Mobile Pocket PC, or Windows XP device that is enabled for modem or wireless synchronization, you can synchronize your M-Business Client content without using a desktop cradle. When you synchronize remotely, your device connects directly to M-Business Server and downloads all channel information, just as it does when you synchronize using a cradle. This feature allows you to update your channels from any location without having to synchronize all the other data on your device.

Before you can use M-Business Client with a modem, you must make sure that the modem is configured properly and that you have network access to your Internet Service Provider (ISP). To configure your modem and network access, refer to your device manufacturer's documentation.

To access M-Business Server, M-Business Client uses the settings in M-Business Connect. If you can connect to your ISP, but you are unable to access M-Business Server, check your M-Business Connect settings.

For instructions on synchronizing remotely, see one of the following sections:

- For Palm OS — "Synchronizing remotely" on page 114
- For Windows Mobile Pocket PC — "Synchronizing remotely" on page 156
- For Windows XP — "Synchronizing remotely" on page 196.
- For Windows Mobile 5 or Microsoft Smartphone — "Synchronizing remotely on Windows Mobile 5 or 6" on page 239

Note
M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Browsing online

If you use a mobile device with a wireless connection, Ethernet card, or modem, you can browse channel and web content in M-Business Client. When your connection is active, you can use M-Business Client's **Open Page** feature to navigate to a URL.

For instructions on browsing online, see one of the following sections:

- For Palm OS — "Browsing online" on page 118

- For Windows Mobile Pocket PC — “Browsing online” on page 158
- For Windows XP — “Browsing online” on page 198
- For Windows Mobile 5 or Microsoft Smartphone — “Browsing online” on page 241

Managing caches

Managing online cache

If you use a mobile device with a wireless connection, Ethernet card, or modem, you can request web pages online. M-Business Client caches these pages (stores them in memory). Caching pages speeds access to those pages the subsequent times that you request them; however, the cache takes up memory on your device.

Some pages are not cacheable because they are secure or are set to expire immediately. Other pages are set to expire quickly, so you may need to reload them when you link to them. For instruction on how to reload a page, see one of the following sections:

- For Palm OS — “Reloading a page” on page 119
- For Windows Mobile Pocket PC — “Reloading a page” on page 159
- For Windows XP — “Reloading a page” on page 199
- For Windows Mobile 5 or Microsoft Smartphone — “Reloading a page” on page 243

If you use a Palm OS, Windows Mobile Pocket PC, or Windows XP device, you can control how much memory your device uses for the cache. However, the online cache can grow beyond the limit that you set. The cache does not clear until you exit M-Business Client or until you manually delete the cache. On your device, you can remove individual pages from the cache to free up memory. For instructions on defining maximum memory or deleting pages from the online cache on a device, see one of the following sections:

- For Palm OS — “Managing online cache” on page 121
- For Windows Mobile Pocket PC — “Managing online cache” on page 161
- For Windows XP — “Managing online cache” on page 201
- For Windows Mobile 5 or Microsoft Smartphone — “Managing online cache” on page 244

Managing caches on M-Business Server

There are three types of caches that M-Business Server stores for your account: channel cache, cookie cache, and authentication information. If you want to clear information that M-Business Server stores, you might need to clear one or more of these caches from your desktop.

Channel cache

M-Business Server caches HTML pages that it retrieves from your channels’ websites. If you clear the channel cache, M-Business Server will refresh all of your channel content at your next synchronization. For example, you might want to clear the channel cache if you are having problems during a synchronization and you want to ensure that you retrieve the latest pages.

During each synchronization, M-Business Server compares the date of the pages in its cache with the date of the pages on the remote site, retrieving only pages that have been updated. Having a channel cache saves time during the synchronization, because M-Business Server does not have to wait to retrieve cached pages.

Cookie cache

Sites that you visit place cookies containing information about you in your user profile. Clearing the cookie cache will remove any personalized information that the web servers that you visit store in your M-Business Server account. If you do not want sites that you visit to display your personalized information when you return to them, you might want to clear the cookie cache.

Authentication information

Some web servers require you to supply a user name and password to access the site. M-Business Server caches this authentication information and supplies it to the web server when you synchronize. If you do not want M-Business Server to supply this information automatically, you might want to clear the authentication cache. Clearing the authentication cache will usually require you to re-enter your user name and password the next time you access a site that requires authentication.

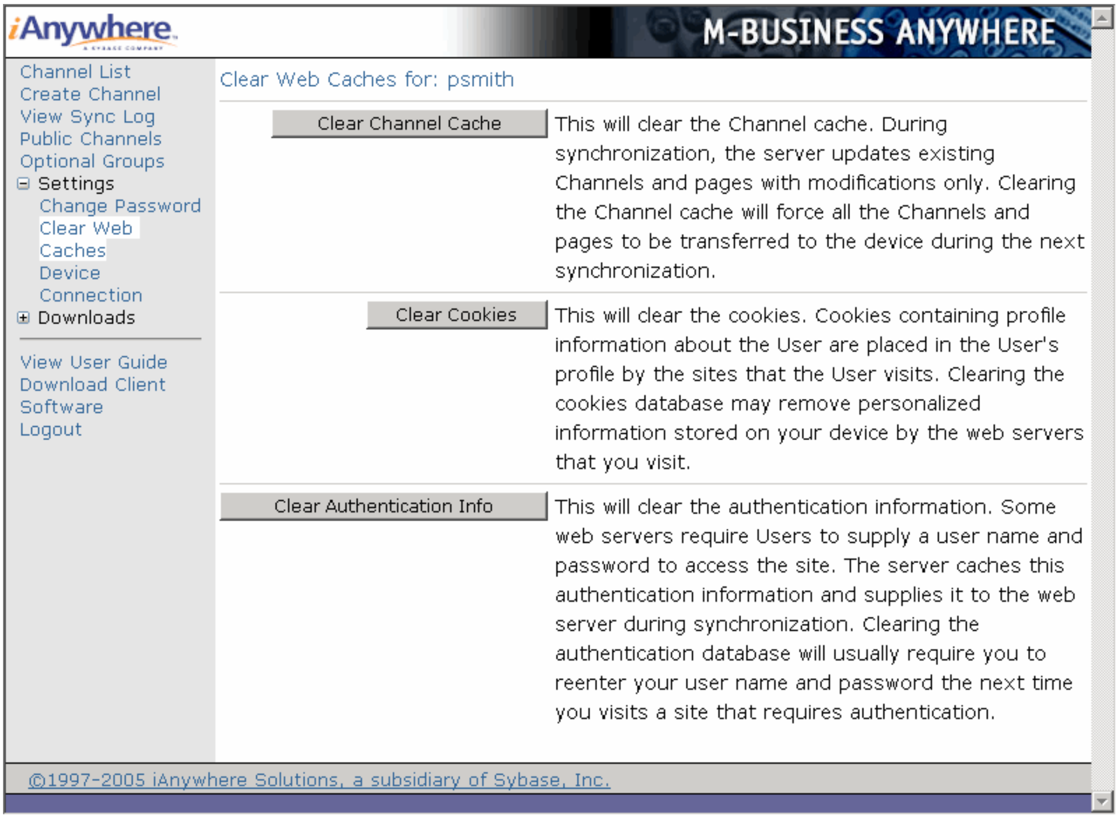
Clearing M-Business Server caches

You can modify settings for the three types of cache used by M-Business Server: Channel, Cookies, and Authentication Info.

♦ To manage the cache settings

1. Access your M-Business Server personal page.
2. Click **Settings»Clear Web Caches**.

   The Clear Web Caches page displays.



3. Click **Clear Channel Cache**, **Clear Cookies**, or **Clear Authentication Info**.

   A dialog appears prompting you to confirm the action.

4. Click **OK**.

   The cached information is cleared.

Part IV. M-Business Client on Palm OS

CHAPTER 6

Configuring a server connection on Palm OS

Contents

Opening M-Business Client on your mobile device

To open M-Business Client on your Palm OS device, tap the **Applications** silk-screen icon, then tap the **M-Business** icon.

To open M-Business Connect, tap the **Applications** silk-screen icon, then tap the **MBConnect** icon.

You also can open M-Business Connect from within M-Business Client. Tap the **Menu** silk-screen icon, then choose **Options»Server Preferences**.

Setting server information

Configuring a new server connection

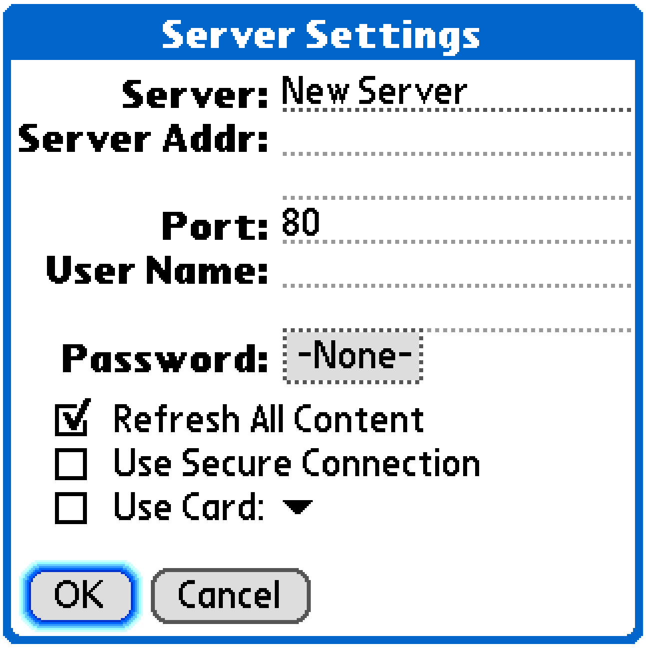
♦ To configure a new server connection

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

2. Tap the **Menu** silk-screen icon, then choose **Server»New Server**.

   The Server Settings dialog appears.



3. Enter your information in the **Server Address**, **Port**, and **User Name** fields.
4. In the **Password** field, tap **None**, enter your password, then tap **OK**.
5. If you want to connect to this server securely you cannot set that up yet.

   The Use Secure Connection checkbox is unavailable until you synchronize once with the server so that it can confirm that it supports secure connections. Finish configuring other features for this server connection now, then after you synchronize with the server, see “Editing a server connection” on page 86.

6. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

> **Note**
> If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

7. Tap **OK**.

   The next time you synchronize, you will be able to view content from the new server.

Editing a server connection

♦ To edit a server connection

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

> **Note**
> You also can get to this screen from within M-Business Client. Tap the **Menu** silk-screen icon, then choose **Options»Server Preferences**.

2. Tap the name of the server in the **Server** field.
3. Tap **Settings**.

   The Server Settings dialog appears. Modify the **Server Address**, **Port**, **User Name**, and/or **Password** fields.
4. Select the **Use Secure Connection** checkbox if you want to connect securely to this server, and the server supports secure connections.

   If the server supports secure connections, the Use Secure Connection checkbox will be available after your first synchronization.
5. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

> **Note**
> If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

6. Tap **OK**.

   The next time you cradle synchronize, your new settings will appear in M-Business Connect on your desktop.

Refreshing all content from a server

♦ To refresh all content from a server

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

2. In the **Server** field, select the name of your server.
3. Tap **Settings**.

   The Server Settings dialog appears.

4. Check the **Refresh All Content** checkbox.
5. Tap **OK**.

   All content from this server will be refreshed the next time you synchronize.

Updating your password

After changing your password on M-Business Server, you must update M-Business Connect with the new password. See "Changing your password" on page 47.

Note
If M-Business Server is integrated with a Microsoft Windows NT domain, your password must be the same as your Windows domain password.

♦ To update your password

1. On your device, tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

2. In the **Server** field, select a server from the drop-down list.
3. Tap **Settings**.
4. In the **Password** field, tap **Assigned** or **None**.
5. Enter your new password, then tap **OK**.
6. In the M-Business Connect screen, tap **OK**.

   Your new password will be active the next time you synchronize.

Adding a proxy server connection manually

You may need to add a proxy server connection manually, either when Autodetect is unsuccessful or when some of the servers that you access with M-Business Connect should use proxy settings, while others should not. See "Configuring proxy server settings" on page 49.

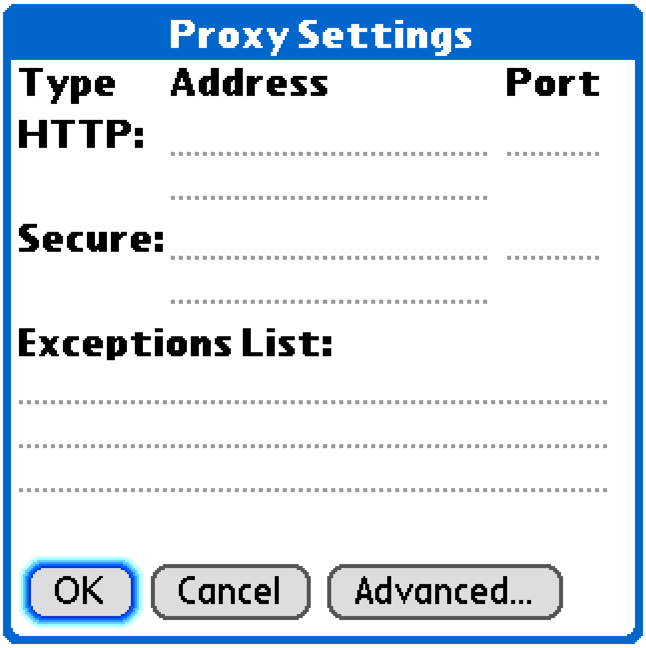
♦ To configure a connection to your proxy server from your device

1. In M-Business Client, tap the **Menu** silk-screen icon, then select **Options»Server Preferences**.

   The M-Business Connect screen appears.

2. Tap the **Menu** silk-screen icon, then choose **Options»Proxy Settings**.

   The Proxy Settings dialog appears.



3. Enter the necessary information in the Proxy Settings dialog.

> **Note**
> Your system administrator has all the necessary information.

4. If your proxy server uses the HTTP protocol, enter information in the **HTTP Address** and **Port** fields.

5. To enter a user name and password for the server you entered in the Address field, tap **Advanced**.

   The Authentication Proxy Settings dialog appears.

6. Select the **Use HTTP authentication** box to enable user name and password protection.

7. Enter your user name and password, then tap **OK**.
8. If your proxy server uses a secure protocol, enter information in the **Secure Address** and **Port** fields.
9. Enter exceptions to the HTTP settings in the **Exceptions List** field. Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the hostnames of servers that M-Business Connect should access without going through the proxy server.

10. Tap **OK**.

Enabling a secure connection to a server

♦ To enable a secure connection to a server

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

2. In the **Server** field, select the name of your server.

3. Tap **Settings**.

   The Server Settings dialog appears.

4. Select the **Use Secure Connection** checkbox.

   The **Use Secure Connection** checkbox appears on your device only after the server in the **Server Addr** field confirms that it can provide a secure connection to the device. The server confirms this during the first synchronize, or when you test the connection in M-Business Connect on your desktop. See "Configuring a new server connection" on page 127.

5. Tap **OK**.

Disabling and removing server connections

To understand why you would disable or remove a server connection, see “Disabling and removing server connections” on page 54.

Disabling and re-enabling a server connection

♦ To disable and re-enable a server connection

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.

2. In the **Server** field, select the name of your server.

3. Clear the **Update During Next Sync** checkbox to disable the server connection.

   Check the **Update During Next Sync** checkbox to re-enable the server connection.

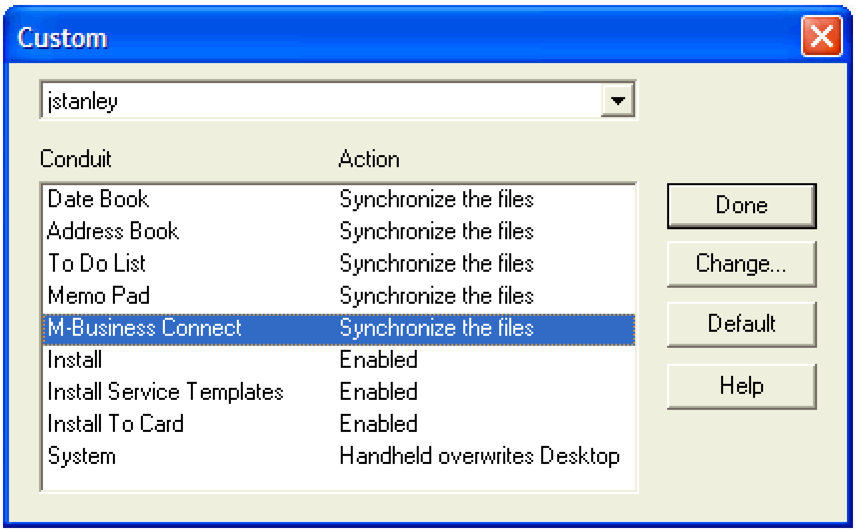
Disabling the M-Business Connect conduit

♦ To disable the M-Business Connect conduit

1. On your desktop computer, choose **Start»Programs»Palm Desktop»HotSync Manager**.

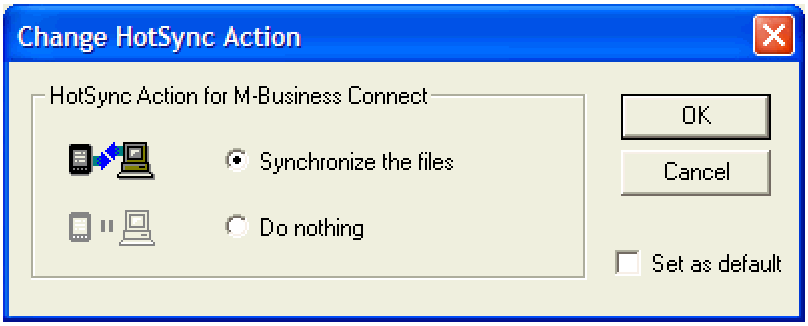
2. In the Windows System tray, click the **HotSync** icon, then select the **Custom** option.

   The HotSync Custom dialog appears.



3. Select the correct mobile device user from the drop-down menu.
4. Select **M-Business Connect** from the **Conduit** list
5. Click **Change**.

   The Change HotSync Action dialog appears.



6. Select the **Do nothing** option.
7. To disable the M-Business Connect conduit for the next synchronization operation only, click **OK**.

   To disable the M-Business Connect conduit until you manually turn it back on, check the **Set as default** checkbox, then click **OK**.
8. In the HotSync Custom dialog, click **Done**.

Removing a server connection

♦ To remove a server connection

1. Tap the **Applications** silk-screen icon, then tap **MBConnect**.

   The M-Business Connect screen appears.
2. In the **Server** field, select the name of your server.
3. Tap the **Menu** silk-screen icon, then choose **Server»Delete**.

   The Delete Server dialog appears.
4. Tap **OK**.

   The next time you cradle synchronize, M-Business Connect will remove the server configuration from the desktop.

CHAPTER 7

Using M-Business Client on Palm OS

Contents

Understanding the basics

This section describes what you need to know to get started using M-Business Client.

Viewing channels

M-Business Client provides a browser that you can use to view channels.

M-Business Client Home Page

If you have added channels to your account on M-Business Server and performed a synchronization, the M-Business Client Home Page on your device will look something like this:

Note
If you do not see any channels, or if you do not see the channels that you expect, see Appendix "Troubleshooting" on page 285.

Collapsing and expanding channel lists

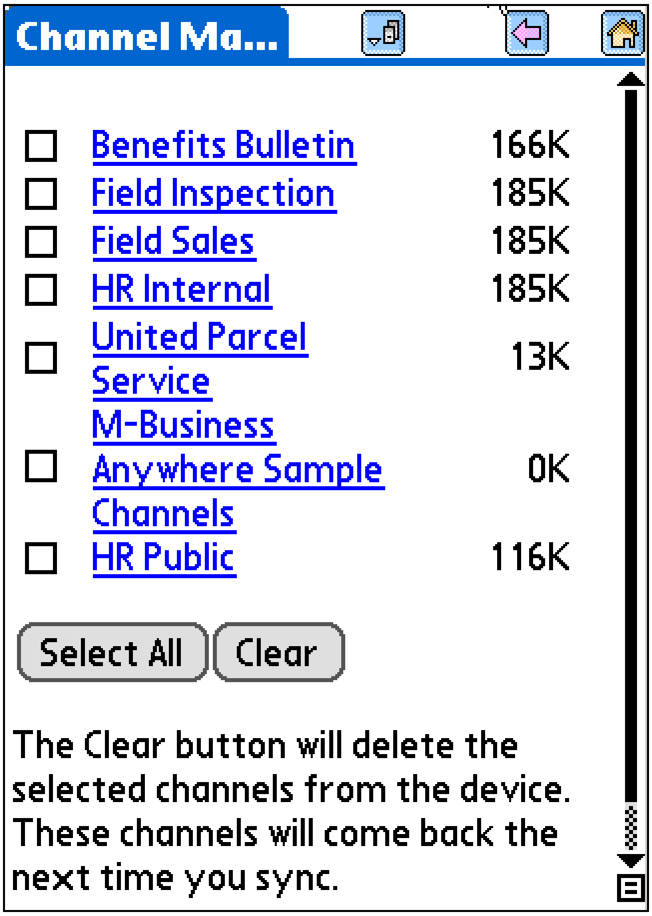
You can collapse or expand your channel lists by tapping the plus (to expand a list) or minus (to collapse a list) next to a channel category.

Temporarily clearing a channel's contents

♦ To temporarily clear a channel's contents

1. Start M-Business Client.
2. Tap the **Menu** silk-screen icon, then choose **Channels»Channel Manager**.

   The Channel Manager appears.



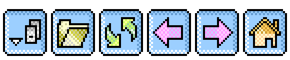
3. Check the checkboxes beside the channels that you want to clear, or tap **Select All**.

4. Tap **Clear**, then tap **OK**.

   The selected channel's contents are removed from the device. You still are subscribed to these channels. The channel contents will be restored the next time you synchronize your device.

Navigating in M-Business Client

As navigation tools, M-Business Client on a Palm OS device provides (from left to right in the image below) **Switch Servers**, **Open Page**, **Reload Page**, **Back**, **Forward**, and **Home** buttons. URLs are underlined.



- **Switch Servers** switches between content synchronized from accounts on different servers, or between different accounts on the same server.

- **Open Page** opens a page for a URL that you enter. This is only available when the device is in online mode.
- **Reload Page** gets a fresh copy of the current page from the web server. This is only available when the device is in online mode.
- **Back** goes back to the page that was displayed before the current page in the browse sequence.
- **Forward** goes forward to the page that was displayed after the current page in the browse sequence.
- **Home** displays the M-Business Client home page for the currently selected server.

Setting preferences

You can set preferences to control whether tables, frames, and images are displayed in HTML pages, what fonts and font sizes are used, and how M-Business Client works.

Setting the full screen option

M-Business Client has a full screen option that allows you to hide the menu bar/navigation button area whenever you want to make the maximum screen space available for viewing content. To hide and redisplay the menu bar/navigation button area, tap the full screen button in the bottom right corner of the screen. The way the button looks tells you the current state of the full screen option:

- The full screen option is off — tapping the button turns it on and hides the menu bar/navigation button area.

- The full screen option is on — tapping the button turns it off and redisplays the menu bar/navigation button area.

Using the Preferences dialog

The following table describes the features of the Preferences dialog on a Palm OS device.

Table 1. Setting preferences on a Palm OS device

Field	Enables/disables or sets	Additional details
BROWSER TAB		

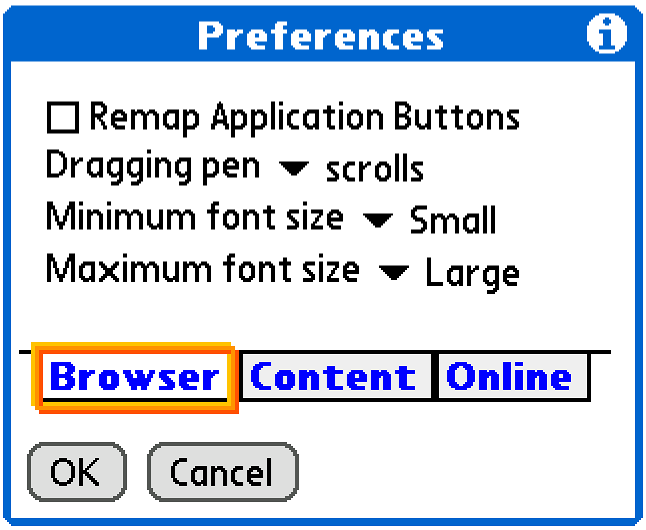
Field	Enables/disables or sets	Additional details
Remap Application buttons	The buttons on the device to perform back and forward functions.	Check the **Remap Application Buttons** box to have your device's **Datebook** and **Address** buttons function as the backward and forward arrows while M-Business Client is the active application.
Dragging pen	What happens when you drag the stylus.	With **scrolls** selected, dragging scrolls the content window; with **selects**, dragging selects text in the content window. See "Working with text" on page 104.
Minimum font size	The minimum font size in which text is displayed.	Select **Small** (the default), to allow the smallest text to be displayed in the smallest size. Select Medium to force the smallest text to be displayed in the medium size. Select Large to force all text to be displayed in the largest size.
Maximum font size	The maximum font size in which text is displayed.	Select **Large** (the default), to allow the largest text to be displayed in the largest size. Select **Medium** to force the largest text to be displayed in the medium size. Select **Small** to force all text to be displayed in the smallest size.
CONTENT TAB		
Show Tables	Showing tables for pages that are not specifically designed for M-Business Client.	If you choose not to display tables, you still get the text from the tables, but the text will not appear in a table.
Show Images	Synchronizing images.	If you choose not to display images, they are not displayed at all. Electing not to display images saves memory on your device.
Enable JavaScript	The device to display pages containing JavaScript that have not been marked with the HTML <HandheldFriendly> tag.	For more information on using JavaScript, contact your system administrator. Note: This preference option only appears in the Application Edition and Web Edition Pro versions of M-Business Client.
Show JavaScript Errors	When this option is turned on, an error message will appear when JavaScript on a page causes an error.	This option is primarily used by channel developers when they are debugging JavaScript.
ONLINE TAB		

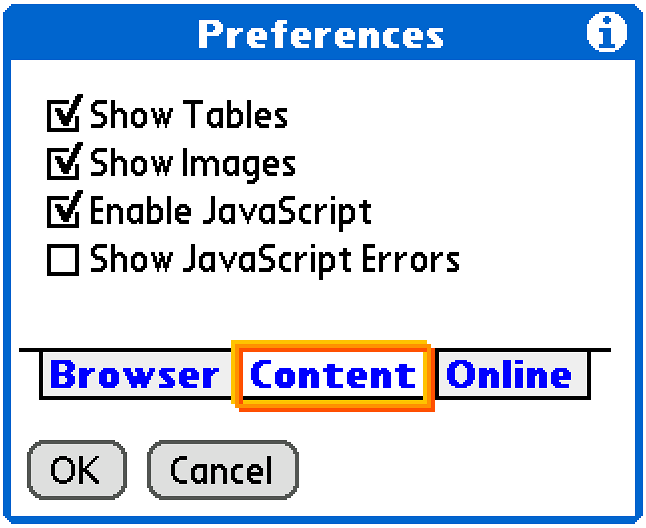
Field	Enables/disables or sets	Additional details
Max Cache-Size	The maximum size in KB of pages stored in the memory cache on your device.	See "Managing online cache" on page 121.
Online Images	Image bit depth when browsing online.	See "Setting bit depth for online images" on page 120.
Go Online Automatically	The device to automatically go online when an offline user tries to open or link to a page which is not on the device.	If not enabled, you will receive a notifier that the page you linked to is not available on your device.
Enable Scanner	The device to scan bar codes and place the numbers in a form field.	This preference option only appears if you have a device with scanning capability, such as the Symbol 1700.

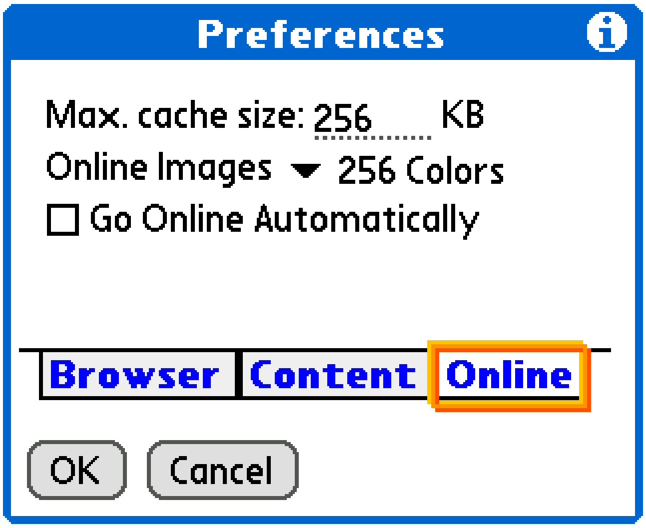
♦ To set preferences

1. Tap the **Applications** silk-screen icon, then tap the **M-Business** icon.
2. Tap the **Menu** silk-screen icon, then choose **Options»Preferences**.
3. Select and clear the checkboxes beside your preferences.

   Tap the tab at the bottom of the preferences to bring another set of preferences forward.







4. Tap **OK**.

Selecting the server that delivers content

♦ **To switch servers on your mobile device when M-Business Client is configured for multiple servers**

1. Start M-Business Client.
2. Tap the **Servers** drop-down list.

   For help locating the **Servers** drop-down list, see "Navigating in M-Business Client" on page 96.

A list of available servers list is displayed.

3. Tap the name of the server you want to select, then tap **Go To Selected Server**.

   M-Business Client displays the home page for the server.

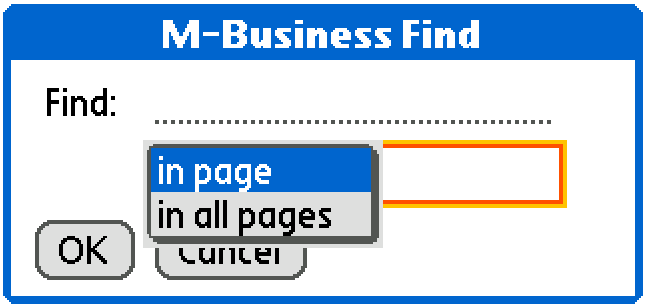
Searching to find content in M-Business Client

From within M-Business Client you can choose to search either the current channel page only, or all M-Business Client channel pages stored on your mobile device.

Searching the current page only

♦ To search the current page only

1. Open a channel page in M-Business Client.
2. Tap the **Menu** silk-screen icon, then choose **Edit»Find.**
3. Select **in page.**



4. Enter the words to search for in the Find field, then tap **OK**.

   The first instance of your searched text is highlighted in the current page.
5. Tap the **Menu** silk-screen icon, then choose **Edit»Find Again** to find the next instance of the searched text.

Searching all pages

♦ To search all M-Business Client Channel pages

1. Start M-Business Client.
2. Tap the **Menu** silk-screen icon, then choose **Edit»Find.**
3. Select **in all pages.**
4. Enter the words to search for in the text field, then tap **OK**.

   A search results page appears, showing found instances by page and search progress.
5. Tap **Find More** to continue searching.

When all pages have been searched, an << **end of search** >> message is displayed on the last search page.

6. Tap a highlighted instance to go to the page and the line where the instance occurs.
7. Tap the **Back** button to return to the results page.

Working with text

M-Business Client provides cut, copy, and paste functions for working with text in channels, web pages, and forms, and for moving text between M-Business Client and other device applications.

Using the copy and paste feature

You can copy selected text from online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as Mail or To Do) on your device.

Note
You cannot use copy and paste functions in M-Business Client dialogs.

♦ To use the copy and paste feature

1. On your device, open a channel or web page.
2. Drag your stylus to select the text you want to copy, or select the entire page by tapping the **Menu** silk-screen icon, then choosing **Edit»Select All.**

   Note
   In order to select portions of text within a channel or web page using your stylus, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text-selection, see “Setting preferences” on page 97.

3. Tap the **Menu** silk-screen icon, then choose **Edit»Copy**.

   The selected text is copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page that you want to paste the copied text into, tap the **Menu** silk-screen icon, then choose **Edit»Paste**.

Using the cut and paste feature

You can cut selected text from form fields in online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as Memo pad or Mail) on your device.

Note
You cannot use cut and paste functions in M-Business Client dialogs or HTML content.

♦ To use the cut and paste feature

1. On your device, open a channel or web page.
2. In a form field, drag your stylus to select the text you want to cut.

> **Note**
> In order to select portions of text within a channel or web page, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text-selection, see "Setting preferences" on page 97.

3. Tap the **Menu** silk-screen icon, then choose **Edit»Cut**.

   The selected text is cut and copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page into which you want to paste the copied text, tap the **Menu** silk-screen icon, then choose **Edit»Paste**.

Using HTML forms

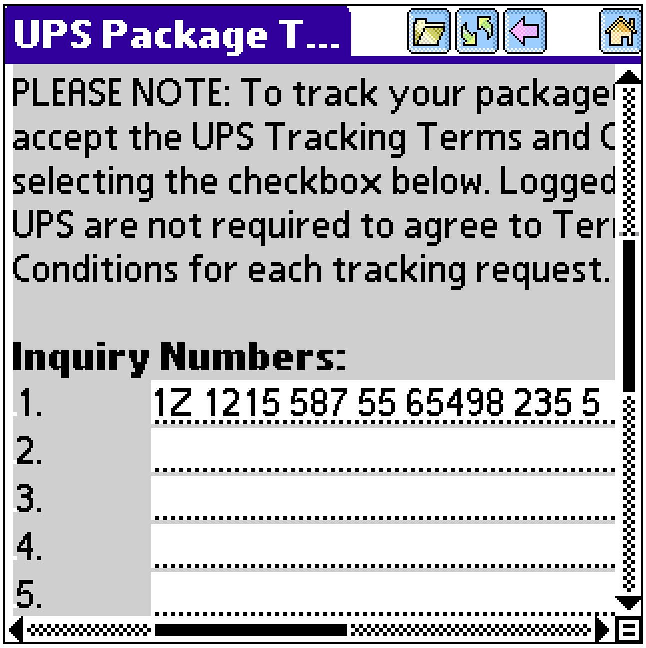
This section describes what you need to know to get started filling out and submitting HTML forms while using M-Business Client.

Submitting HTML forms while offline

Note
When filling out a form, you may find the copy and paste feature especially useful. See "Working with text" on page 104.

♦ To submit HTML forms in M-Business Client while offline

1. Fill out the form.



2. Tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message saying the form will be submitted on the next synchronization.

3. Tap **OK**.

   The form has been added to the Forms Manager queue.

> **Note**
> You can use the Forms Manager to view the status of the submitted form. See "Using the Forms Manager" on page 107.

4. Synchronize your mobile device to send the form to the website.

   See the documentation that came with your Palm OS device for instructions.

Displaying the response

M-Business Server may respond to a form submission in one of two ways:

- The server may alter the channel pages that you initially downloaded.

  For example, suppose you subscribe to a financial channel and every time you synchronize, your channel updates a page that shows the current prices of a list of stocks you had selected earlier. You might submit a form to change the list of stocks you want to watch. In this case, the server responds by changing the page that displays the current prices to reflect your new list.

  To look at the server's response, select the channel.

- The server may send down a separate response page.

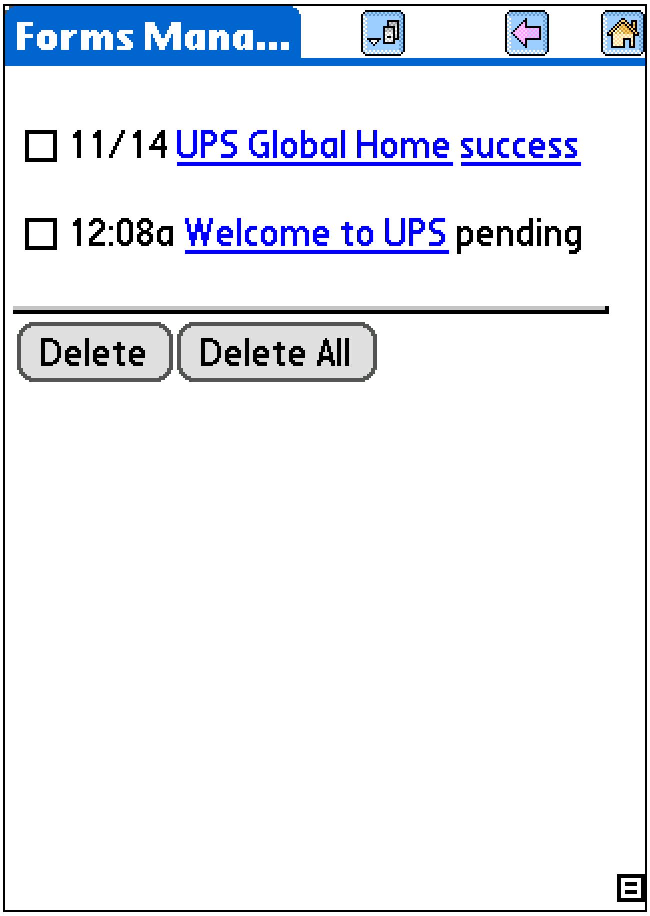
  Suppose you submit a form to the same channel, but this time you want to buy shares of a stock. There are no channel pages to alter. Instead, the server downloads a new response page to the Forms Manager that confirms your order.

Using the Forms Manager

Accessing the Forms Manager

♦ To access the Forms Manager

1. Start M-Business Client.
2. On the M-Business Client home page, tap **Forms**, or tap the **Menu** silk-screen icon, then choose **Channels»Forms Manager**.



M-Business Client displays a list of forms that you have submitted or are going to submit during the next synchronization.

If a form was submitted successfully, the word **success** appears to the right of the form's name.

You can tap **success** to view the response page.

Editing forms in the Forms Manager queue

♦ **To edit a form**

1. Start M-Business Client.
2. On the M-Business Client home page, tap **Forms**.

   The Forms Manager appears.

> **Tip**
> You also can access the Forms Manager by tapping the **Menu** silk-screen icon, then choosing **Channels»Forms Manager**.

3. In the column of links, tap the linked title of the form.

   The form appears.

4. Edit the form.
5. Tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message indicating the form will be submitted on the next synchronization.

6. Tap **OK**.

Deleting forms in the Forms Manager queue

♦ To delete a form

1. Start M-Business Client.
2. On the M-Business Client home page, tap **Forms**.

   The Forms Manager appears.

> **Note**
> You also can access the Forms Manager by tapping the **Menu** silk-screen icon, then choosing **Channels»Forms Manager**.

3. Select the checkbox to the left of the form(s) that you want to delete.
4. Tap **Delete**.
5. Tap **OK**.

> **Tip**
> To delete all forms in the queue, tap **Delete All**.

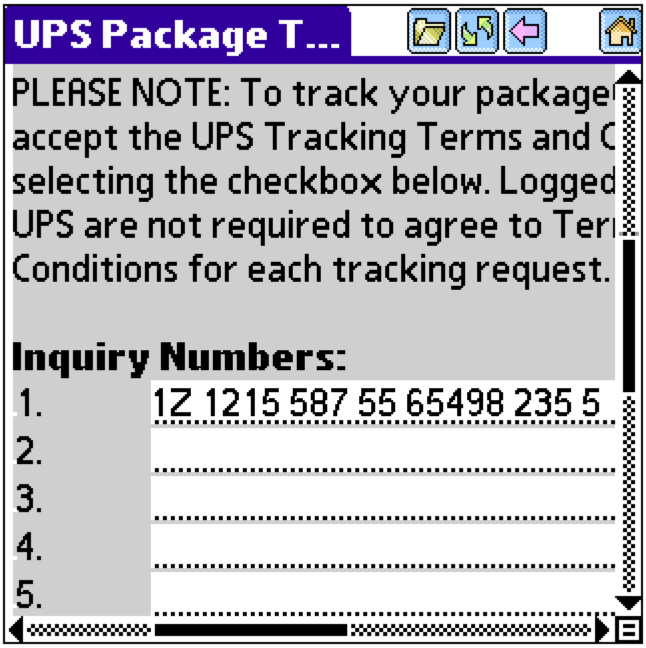
Submitting HTML forms while online

When submitting a form, keep in mind the options on the Edit menu. These menus are especially useful for filling out forms. The Cut, Copy, and Paste options apply to channel pages and the contents of forms. You cannot apply these options to M-Business Client dialogs, but you can apply these options between channel pages.

For information on using the Copy and Paste feature, see “Working with text” on page 104.

♦ To submit HTML forms in M-Business Client while online

1. Fill out the form.



2. Tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   The form is sent to the website, the website responds, and the response is downloaded to your mobile device.

Email integration: Launching email from a web page

You can launch your native Palm Mail application from a web page on your device. When you tap an email link in a web page on your device, a new email is automatically addressed and saved to your Mail Outbox folder.

♦ **To launch your native Palm Mail application from a web page on your device**

1. In a web page on your device, tap an email link.

   A confirmation dialog appears.

2. Tap **OK** to launch your Palm Mail application.

   Your Mail application launches in Inbox view.

3. Select **Outbox** from the drop down menu to switch to outbox view.
4. In your Outbox, tap the new email message, then tap **Edit** to compose your message.


New Message
To: someone@somewhere.com
CC:
Subj:
Body:
Send
Cancel
Details...

Phoneto integration: Launching a dialer application from a web page

Use the `phoneto` link to launch a configured dialer application, with the telephone number automatically filled in, from a device web page. An example of the HTML markup for a `phoneto` link is as follows.

```
<a href=phoneto:18005551212>Toll-free directory assistance</a>
```

On your device screen, a `phoneto` link looks just like any other link, but the link text should make it clear that this link makes a phone call.

♦ To launch a configured dialer application from a device web page

1. Tap the telephone number link on the device.
2. The dialing will initiate automatically.

> **Note**
> You will get an error message if the device does not contain an integrated telephone. The error message will display the telephone number that was selected, so you can then manually dial this telephone number on another device.

Synchronizing remotely

Note
M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Using a modem to synchronize

On your device, you can synchronize with M-Business Server either from within M-Business Client or from within M-Business Connect.

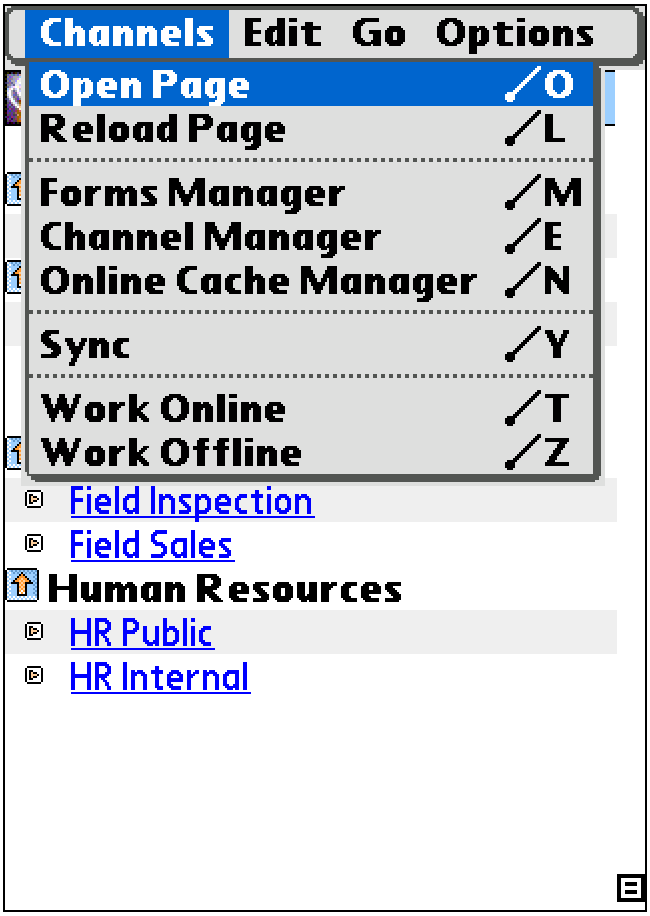
The exact steps involved in configuring a modem (or another network or wireless connection) to work with M-Business Connect depend on your device and the modem or other hardware you use.

Synchronizing from within M-Business Client

♦ **To synchronize from within M-Business Client**

1. Attach the modem or other network device.
2. In M-Business Client, tap the **Menu** silk-screen icon, then choose **Channels»Sync**.

   M-Business Client automatically accesses the modem (or other network or wireless connection), initiates the network connection, and synchronizes with M-Business Server.



Synchronizing from within M-Business Connect

♦ **To synchronize from within M-Business Connect**

1. Attach the modem.
2. Tap the **Applications** silk-screen icon, then tap **MBConnect**.
3. Tap **Sync This Server**.

   M-Business Connect accesses the modem or other hardware, initiates the network connection, and synchronizes with M-Business Server.

Using an infrared port to synchronize

If you use an infrared (IR) port, you can synchronize with M-Business Server at your desktop or laptop computer without using a cradle.

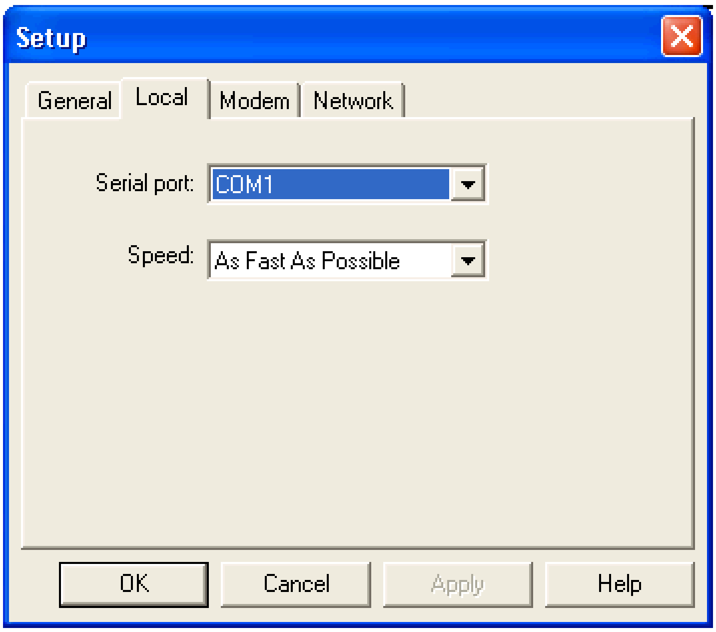
Before you start:

- Make sure that IrDA (industry standard IR port) is an installed component on your desktop or laptop computer. If you are running Microsoft Windows 98 or higher, this is a standard feature. Otherwise, check the Microsoft website to download the latest software components.
- Configure your desktop or laptop computer to enable infrared communication. Procedures for this process vary depending on which version of Windows you are running. Access Windows Help from your desktop by choosing **Start»Help**. To find the procedure for your computer, search for "configuring infrared devices".

♦ To use an IR port to synchronize

1. Start HotSync from your desktop by choosing **Start»Programs»Palm Desktop»HotSync Manager**.
2. Right click on the **HotSync** icon in the taskbar.
3. Click **Setup**.

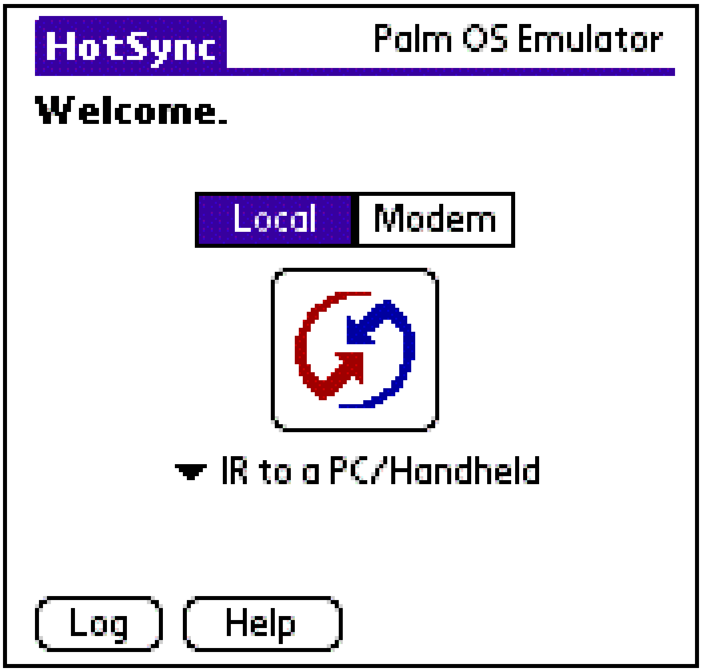
   The HotSync Setup dialog appears.



4. Click **Local**.
5. In the **Serial port** list, select **COM4**.
6. In the **Speed** list, select **As Fast As Possible**.
7. Click **OK**.
8. On your device, tap the **Applications** silk-screen icon.

9. Tap **HotSync**.

   The HotSync panel appears.



10. In the drop-down list below the HotSync logo, select **IR to a PC/Handheld**.
11. Align the Palm IR window with the IR window on your desktop or notebook computer.
12. Tap **HotSync** to initialize the connection.
13. Start the M-Business Client application to browse the Internet or to synchronize your channels. For information on online browsing, see “Browsing online” on page 118.

Browsing online

Palm OS devices have an **Open Page** feature and **History** select list to enable online browsing to a specific URL. In addition, Palm OS provides a **Shortcuts** select list for inserting common prefixes and suffixes to Internet addresses.

The progress bar fills from left to right as data is received by your mobile device. It also displays a count of bytes received. If a **Secure Connection** icon appears beside the progress bar, the data transfer is secure.

Browsing content

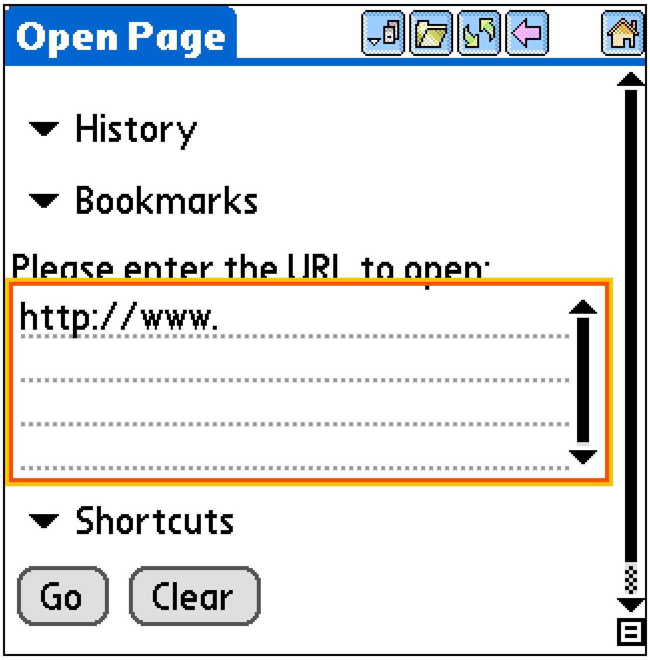
To browse the Internet or your corporate intranet using M-Business Client, tap the **Menu** silk-screen icon, then choose **Channels»Connect**. The flashing vertical bar in the upper right corner indicates you are online.

♦ To go to a specific URL while browsing online on a Palm OS device

1. Tap the **Menu** silk-screen icon, then choose **Channels»Open Page**, or tap the following icon.

2. Enter the URL in the **Please enter the URL to open** panel.



3. Tap **Go**.

   The requested page appears.

4. To disconnect your modem, tap the **Menu** silk-screen icon, then choose **Channels»Work Offline**.

   Your service connection is closed.

> **Note**
> To configure M-Business Client to switch to online mode when you try to open a page not already downloaded to your device, use the **Go Online Automatically** feature. See "Setting preferences" on page 97 for more information.

Reloading a page

When you are connected to the Internet, you can use the Reload Page command to update the contents of a page. When you are offline, you can use the command to clear form data.

On your device, invoke the Reload Page command by tapping the **Menu** silk-screen icon and choosing **Channels»Reload Page**, or by tapping the following icon.

This icon appears only when your device is in connected mode.

Setting bit depth for online images

♦ **To set bit depth for online images**

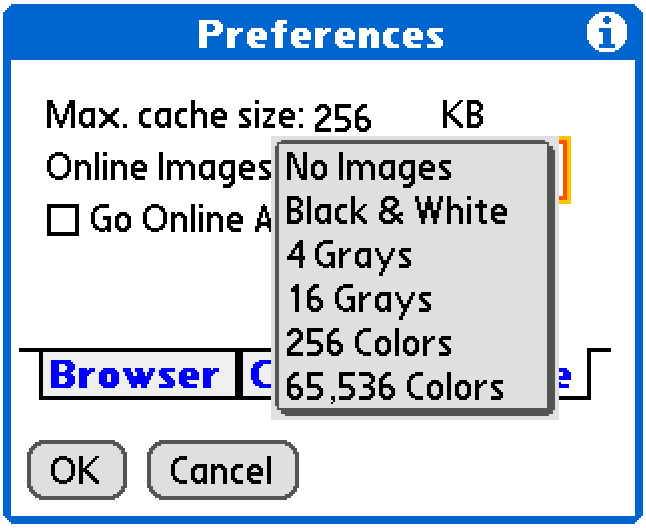
1. In M-Business Client, tap the **Menu** silk-screen icon, then choose **Options»Preferences**.

   The Preferences dialog appears.

2. Tap the **Online** tab to bring it forward.

3. Tap the drop-down list for **Online Images** to see a list of bit depths.

   The bit depth options listed will depend on your mobile device.



4. Select the bit depth.

5. Tap **OK**.

Managing online cache

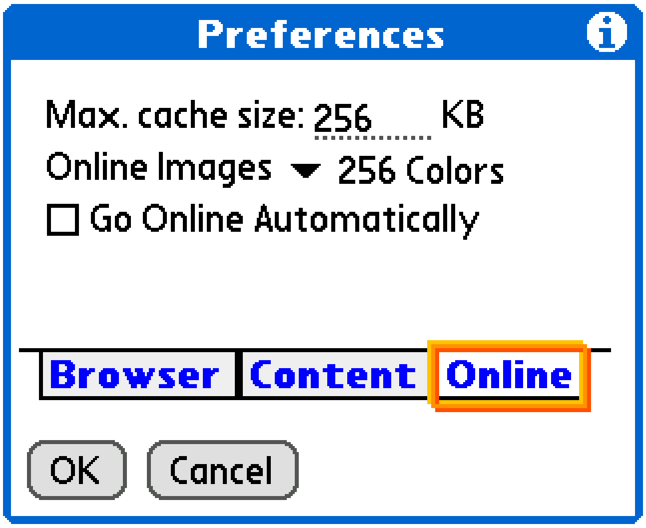
Defining maximum memory for caching

To define the maximum amount of memory for caching on a Palm OS:

♦ **To set maximum memory**

1. In M-Business Client, tap the **Menu** silk-screen icon.
2. Choose **Options»Preferences.**

   The Preferences dialog appears.
3. Tap the **Online** tab to display the online set of preferences.



4. Specify the **Max. cache size** in kilobytes.

> **Note**
> The maximum allowable cache size is 32,000 K; the default cache size is 200K.

5. Tap **OK**.

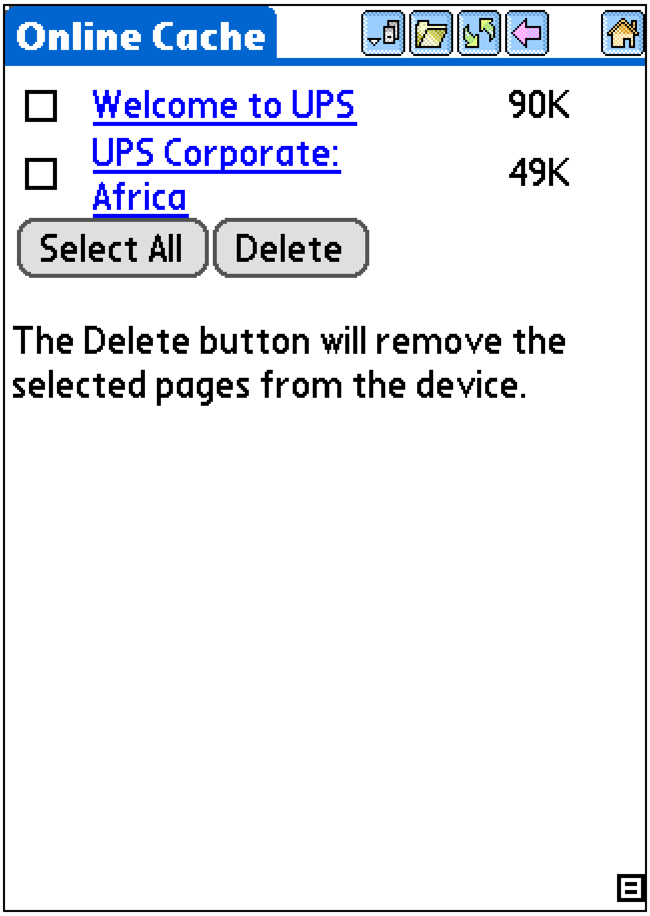
Deleting a page from the online cache

If you are browsing online, M-Business Client caches the pages it already has displayed. See "Managing online cache" on page 78. You can remove individual pages from the cache to free up space.

♦ To delete a page from the online cache on a Palm OS device

1. Tap the **Menu** silk-screen icon, then choose **Channels»Online Cache Manager**.

   M-Business Client displays a list containing the titles of any pages in the cache.



2. Select the checkboxes beside the pages you want to delete from the cache, or tap **Select All**.
3. Tap **Delete**.
4. Tap **Yes**.

   The selected pages are removed from the cache.

> **Note**
> Although the cache now shows 0K used, the contents of the cache are not cleared entirely until you connect your device to the server by cradle synchronizing or by modem synchronizing.

Part V. M-Business Client on Windows Mobile Pocket PC

CHAPTER 8

Configuring a server connection on Windows Mobile Pocket PC

Contents

Opening M-Business Client on your mobile device

Opening M-Business Client

To access M-Business Client on your Windows Mobile Pocket PC device, tap **Start»Programs**, then tap the **M-Business Client** icon.

Opening M-Business Connect

You can open M-Business Connect from within M-Business Client on your Windows Mobile Pocket PC device. Choose **Tools»Server Options**.

You also can open M-Business Connect from the Start menu. Choose **Start»Settings»Connections»M-Business Connect**.

Setting server information

Configuring a new server connection

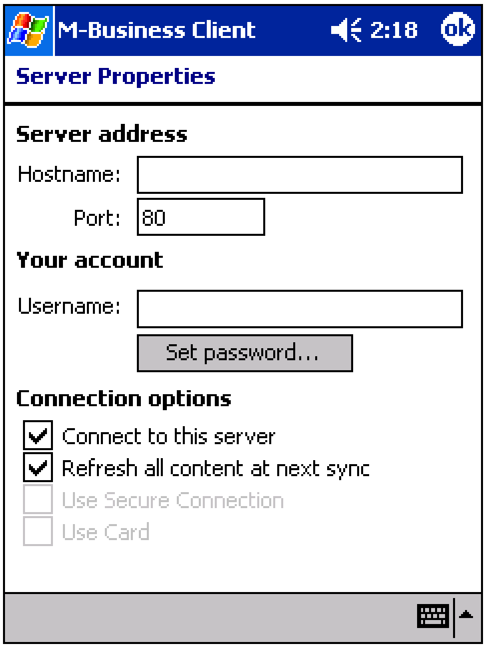
♦ To configure a new server connection

1. Tap **Start»Programs**, then tap the **M-Business Client** icon.

   M-Business Connect opens.

2. Choose **Tools»Server Options**, then tap **Add**.

   The Server Properties dialog appears.



3. Complete the **Hostname**, **Port**, and **Username** fields.

4. Tap the **Set password** button, enter your password, then tap **OK**.

5. If you want to connect to this server securely you cannot set that up yet.

   The Use Secure Connection checkbox is unavailable until you synchronize once with the server so that it can confirm that it supports secure connections. Finish configuring other features for this server connection now, then after you synchronize with the server, see “Editing a server connection” on page 209.

6. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

Note
If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

7. Tap **OK**.

   The next time you synchronize, you will be able to view content from the new server.

Editing a server connection

♦ To edit a server connection

1. Start M-Business Client.
2. Choose **Tools»Server Options**.

   The M-Business Connect screen appears.
3. In the Server settings field, tap the name of your server, then tap **Properties**.

   The Server Properties dialog appears.
4. Modify the **Hostname**, **Port**, and/or **Username** fields.
5. To edit your password, tap the **Set password** button, enter your password, the tap **OK**.
6. Select the **Use Secure Connection** checkbox if you want to connect securely to this server, and the server supports secure connections.

   If the server supports secure connections, the **Use Card** checkbox will be available after your first synchronization.
7. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

Note
If you installed M-Business Client on your SD card, the **Use Card** checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

8. Tap **OK**.

   The next time you cradle synchronize, your new settings will appear in M-Business Connect on your desktop.

Refreshing all content from a server

♦ To refresh all content from a server

1. Start M-Business Client.
2. Choose **Tools»Server Options**.

   The M-Business Connect screen appears.
3. In the Server settings field, tap the name of your server, then tap **Properties**.

   The Server Properties dialog appears.
4. Check the **Refresh all content at next sync** checkbox.
5. Tap **OK**.

Updating your password

After changing your password on M-Business Server, you must update M-Business Connect with the new password. See "Changing your password" on page 47.

> **Note**
> If M-Business Server is integrated with a Windows domain, your password must be the same as your Windows domain password.

♦ To update your password

1. On your device, choose **Start»Settings**, tap the **Connections** tab, then tap **M-Business Connect**.

   The M-Business Connect screen appears.
2. Tap the **Servers** tab, then select a server from the **Server settings** list.
3. Tap **Properties**.
4. Tap **Set password**.
5. Enter your new password, the tap **OK**.
6. Tap **OK**.

   Your new password will be active the next time you synchronize.

Adding a proxy server connection manually

Add a proxy server connection manually either when Autodetect is unsuccessful or when some of the servers that you access with M-Business Connect should use proxy settings, while others should not. See "Configuring proxy server settings" on page 49. If you do not know what settings to enter, contact your system administrator.

Adding HTTP proxy settings

♦ To add HTTP proxy settings

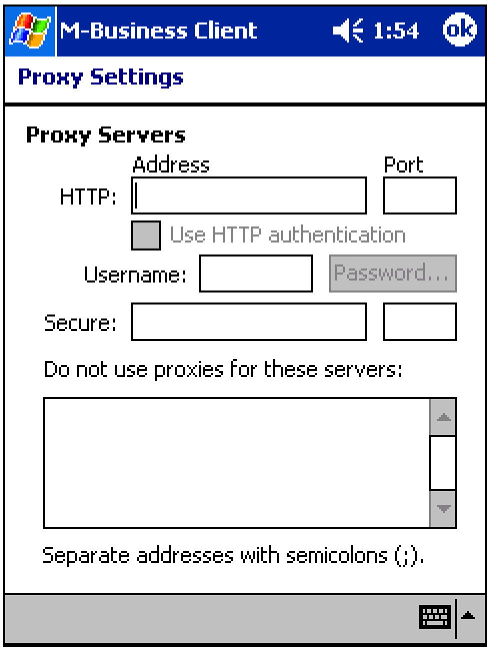
1. In M-Business Client, choose **Tools»Server Options**.

   The M-Business Connect dialog appears.

2. Tap the **Connection** tab.

3. Tap **Change**.

   The Proxy Settings dialog appears.



4. Enter your information in the **HTTP Address** and **Port** fields.

5. To enable user name and password protection, select the **Use HTTP authentication** checkbox.

6. In the **Username** box, enter your user name.

7. Tap the **Password** button, enter your password, then tap **OK**.

8. Enter exceptions to the HTTP settings in the **text** field under **Do not use proxies for these servers**. Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the host names of servers that M-Business Connect should access without going through the proxy server.

9. In the Proxy Settings dialog, tap **OK**.

Adding secure proxy settings

♦ To add secure proxy settings

1. In M-Business Client, choose **Tool»Server Options**.

   The M-Business Connect dialog appears.

2. Tap the **Connection** tab.
3. Tap **Change**.

   The Proxy Settings dialog appears.

4. Enter your information in the **Secure Address** and **Port** fields.
5. Enter exceptions to the settings in the **Exceptions List** field. Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the host names of servers that M-Business Connect should access without going through the proxy server.

6. Tap **OK**.

Enabling a secure connection to a server

♦ To enable a secure connection to a server

1. In M-Business Client, choose **Tools»Server Options**.

   The M-Business Connect dialog appears.

2. In the **Server settings** field, select the name of your server, then tap **Properties**.

   The Server Properties dialog appears.

3. Select the **Use Secure Connection** checkbox.

> **Note**
> This checkbox is enabled only after the server in the **Hostname** field confirms that it can provide a secure connection to the device. The server confirms this during the first synchronization, or when you test the connection in the M-Business Connect dialog on your desktop. See "Configuring a new server connection" on page 127.

4. Tap **OK**.

Disabling and removing server connections

To understand why you would disable or remove a server connection, see "Disabling and removing server connections" on page 54.

Disabling and re-enabling a server connection

♦ To disable and re-enable a server connection

1. In M-Business Client, choose **Tools»Server Options**.

   The M-Business Connect dialog appears.

2. From the list, select the server that you want to disable.
3. Tap **Properties**.

   The Server Properties dialog appears.

4. Clear the **Connect to this server** checkbox.

   To re-enable the server connection, select the **Connect to this server** checkbox.

5. Tap **OK**.

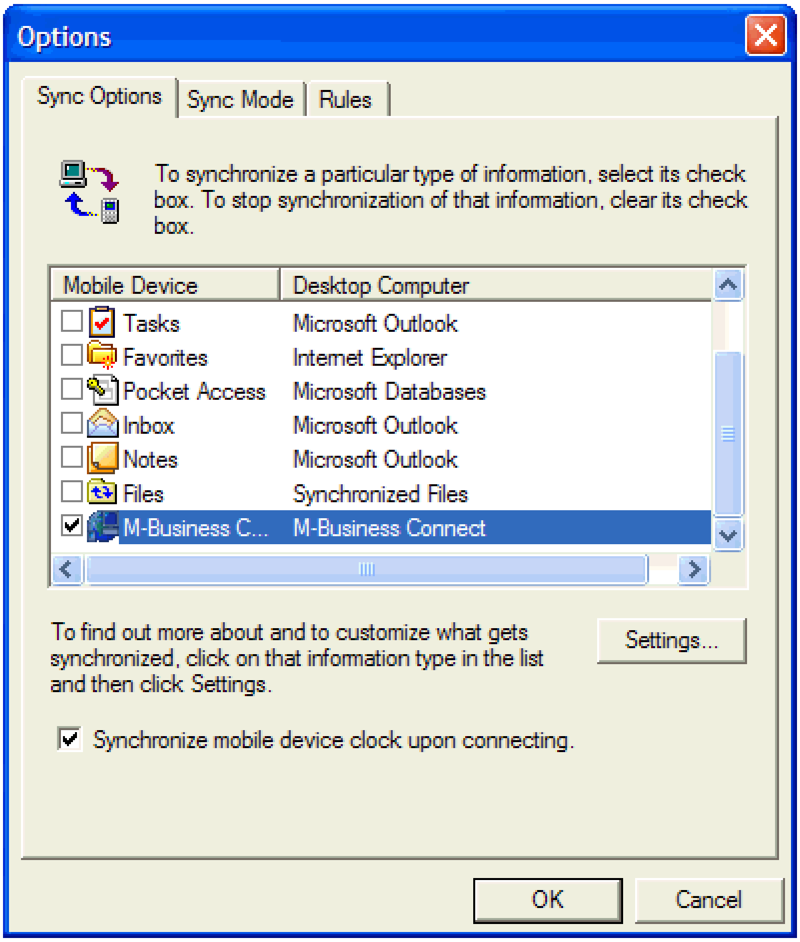
Disabling the M-Business Connect conduit

♦ To disable the M-Business Connect conduit

1. On your desktop computer, choose **Start»Programs»Microsoft ActiveSync**.
2. Choose **Tools»Options**.

   The Options dialog appears.

3. Click the **Sync Options** tab.



4. Clear the **M-Business Connect** checkbox.
5. Click **OK**.

Removing a server connection

♦ To remove a server connection

1. In M-Business Client, choose **Tools»Server Options**.

   The M-Business Connect dialog appears.

2. From the list, clear the checkbox for the server that you want to remove.

> **Note**
> Any server with a cleared checkbox will be removed. Any server with a selected checkbox will remain.

3. Tap **Remove**.

   A dialog will ask you to confirm.

4. Tap **OK**.

   The next time you cradle synchronize, M-Business Connect will remove the server configuration from your desktop.

CHAPTER 9

Using M-Business Client on Windows Mobile Pocket PC

Contents

Understanding the basics

This section describes what you need to know to get started using M-Business Client.

Windows Mobile Pocket PC devices with hardware keyboard

Some Windows Mobile Pocket PC devices have a hardware keyboard that you can use to enter text, instead of using a stylus with the software input panel (SIP). On the devices listed below, M-Business Client installs with the software keyboard disabled; only the hardware keyboard can be used to enter text.

- Audiovox PPC6600 and related models
- i-Mate PDA2k
- HP iPAQ models with keyboards

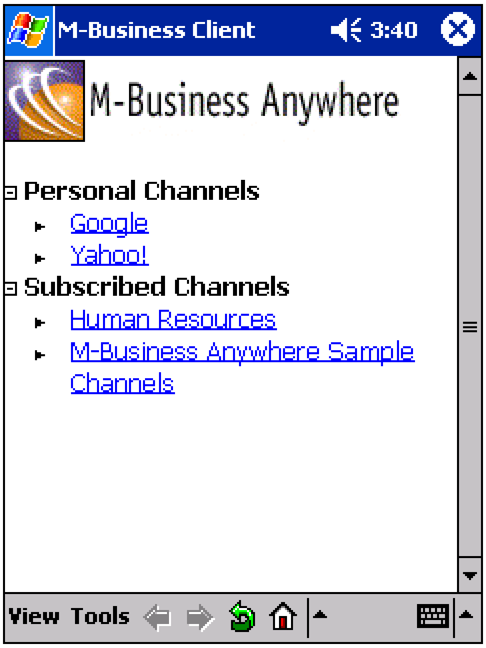
If you wish to use the software keyboard and stylus instead, you can switch to that input mode — see the documentation that came with your device for instructions on switching input modes.

Viewing channels

M-Business Client provides a browser that you can use to view channels.

M-Business Client Home Page

If you have added channels to your account on M-Business Server and performed a synchronization, the M-Business Client Home Page on your device will look something like this:



Note
If you do not see any channels, or if you do not see the channels that you expect, see Appendix "Troubleshooting" on page 285.

Collapsing and expanding channel lists

You can collapse or expand your channel lists by tapping the plus (to expand a list) or minus (to collapse a list) next to a channel category.

Temporarily clearing a channel's contents

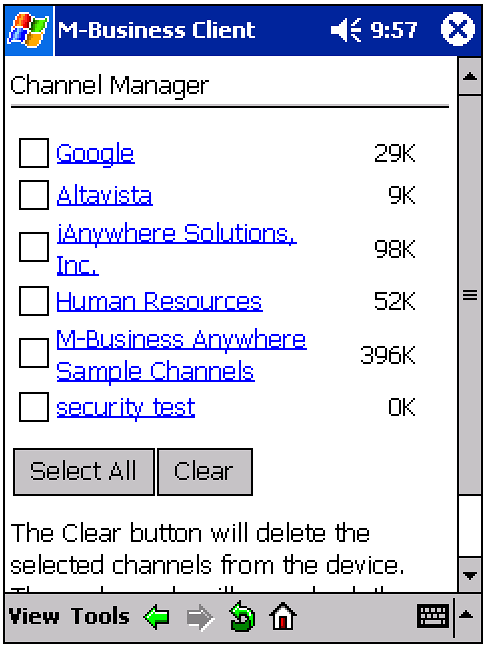
♦ To temporarily clear a channel's contents

1. Start M-Business Client.
2. Choose **View»Channel Manager**.
3. Select the checkboxes beside the channels that you want to clear from the device, or tap **Select All**.

Note
Any channel with a selected checkbox will be temporarily cleared. Any channel with a cleared checkbox will remain.

4. Tap **Clear**.

   The selected channel's contents are removed from the device. You are still subscribed to these channels. The channel contents will be restored the next time you synchronize your data.



Navigating in M-Business Client

As navigation tools, M-Business Client on a Windows Mobile Pocket PC device provides (from left to right in the image below) **Back**, **Forward**, **Reload Page**, and **Home** buttons, plus a **Servers** drop-down list. In addition, you can use the View and Tools menus. URLs are underlined.

- **Back** goes back to the page that was displayed before the current page in the browse sequence.
- **Forward** goes forward to the page that was displayed after the current page in the browse sequence.
- **Reload Page** gets a fresh copy of the current page from the web server. This is only available when the device is in online mode.
- **Home** displays the M-Business Client home page for the currently selected server.
- **Servers** drop-down list switches between content synchronized from accounts on different servers, or between different accounts on the same server.

To navigate within an HTML page, you have the option of using scroll bars, drag-scrolling with a stylus, or tabbing with a directional pad.

Drag-scrolling

Drag-scrolling gives you finer control over navigation within an HTML page. When drag-scrolling is enabled, you simply can tap and drag in an HTML page to scroll up or down, rather than using the scroll bars. When drag-scrolling is disabled, selection of text is disabled. For instructions on how to enable or disable drag-scrolling, see "Setting preferences" on page 141.

Tabbing with a directional pad

You also can navigate through HTML pages by tabbing with the directional pad. When you enable **D-pad right/left act like tab/backtab**, your device directional pad left and right actions function as forward and back tabs while M-Business Client is the active application. For instructions on how to enable or disable this function, see "Setting preferences" on page 141.

Setting preferences

Setting the full screen option

M-Business Client has a full screen option that allows you to hide the menu bar/navigation button area whenever you want to make the maximum screen space available for viewing content.

♦ To set the full screen option

1. Tap and hold anywhere within the content area of the M-Business Client screen to display the context menu.
2. From the context menu, select **Full screen**.

   If Full screen had a check beside it when you opened the context menu, the full screen option was on and selecting it now turns it off.

   If Full screen did *not* have a check beside it when you opened the context menu, the full screen option was off and selecting it now turns it on.

Using the Option Manager

The following table describes the features in the Option Manager on your device.

Table 1. Option Manager preferences for Windows Mobile Pocket PC

Field	Enables/disables or sets	Additional details
BROWSER TAB		

Field	Enables/disables or sets	Additional details
D-pad navigates on page	Using device directional pad to navigate pages in M-Business Client	Selected, device directional pad arrows move the focus on the current page; up, down, left, and right arrows scroll the current page up, down, left, and right if there is no object to which focus can move within the current page. Cleared, device directional pad up and down arrows scroll up and down a page, and left and right arrows scroll left and right a page.
Dragging pen	What happens when you drag the stylus.	With **scrolls** selected, dragging scrolls the content window; with **selects**, dragging selects text in the content window. See "Working with text" on page 147.
Minimum font size	The minimum font size in which text is displayed.	Select **None** (the default) to leave font size under page control. Select **Small**, to allow the smallest text to be displayed in the smallest size. Select **Medium** to force the smallest text to be displayed in the medium size. Select **Large** to force all text to be displayed in the largest size.
Maximum font size	The maximum font size in which text is displayed.	Select **None** (the default) to leave font size under page control. Select **Large**, to allow the largest text to be displayed in the largest size. Select **Medium** to force the largest text to be displayed in the medium size. Select **Small** to force all text to be displayed in the smallest size.
CONTENT TAB		
Show Tables	Viewing tables	Showing tables may not be necessary for text-heavy synchronizing.
Show Images	Viewing images.	Showing images may not be necessary for text-heavy synchronizing.
Enable JavaScript	The device to run JavaScript on pages that have not been marked with the HTML <HandheldFriendly> tag.	For more information on using JavaScript, see your System Administrator.
Show JavaScript Errors	The device to display an error message when a JavaScript error occurs	This is primarily a debugging tool used by channel developers.
ONLINE TAB		

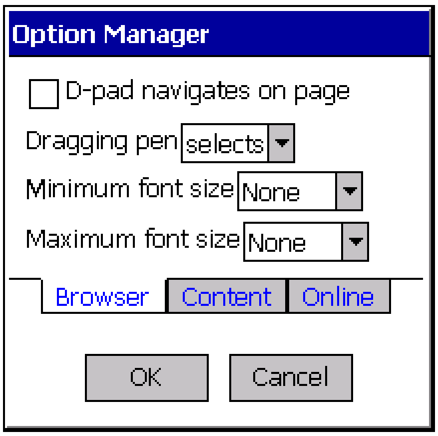
Field	Enables/disables or sets	Additional details
Max. cache size	The maximum KB of pages stored in the memory cache on your device.	See “Managing online cache” on page 161.
Online Images	Image bit depth when browsing online.	See “Setting bit depth for online images” on page 160.
Go Online Automatically	The device to automatically go online when an offline user tries to open or link to a page which is not on the device	If not enabled, you will see a notifier that the page you linked to is not available on your device.

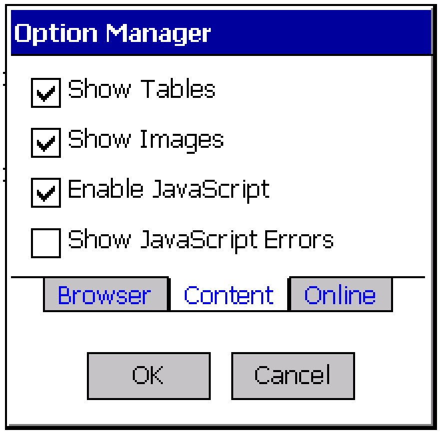
♦ To set preferences

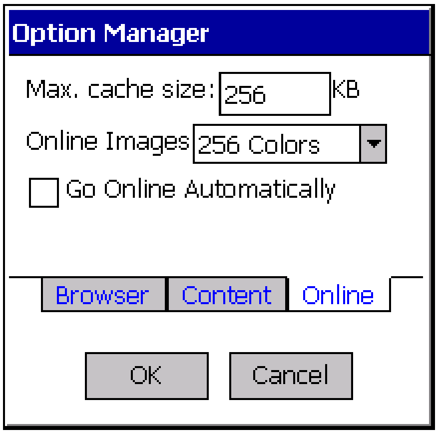
1. Start M-Business Client.
2. Choose **Tools»Options**.

   The Option Manager dialog opens.
3. Select and deselect the checkboxes beside your preferences.

   Tap the tab at the bottom of the preferences to bring another set of preferences forward.







4. Tap **OK**.

Selecting the server that delivers content

♦ To switch servers on your mobile device when M-Business Client is configured for multiple servers

1. Start M-Business Client.
2. Tap the **Servers** drop-down list.

   For help locating the **Servers** drop-down list, see "Navigating in M-Business Client" on page 140.
3. Tap the name of the server you want to select.

   M-Business Client displays the home page for the server.

Searching to find content in M-Business Client

You can search M-Business Client channel pages from within M-Business Client only. If you select **Find** from the **Start** menu, your search will not include M-Business Client content.

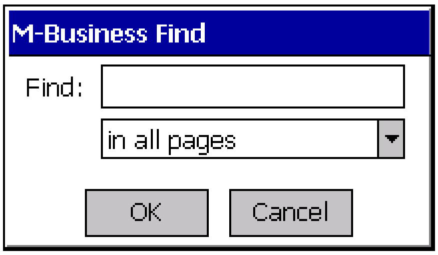
From within M-Business Client you can choose to search either the current channel page only, or all channel pages stored on your mobile device.

Searching the current page only

♦ To search the current page only

1. Start M-Business Client.
2. Choose **Tools»Find**.

   The M-Business Find dialog is displayed.



3. Select **in page.**
4. Enter the words to search for in the text field, then tap **OK**.

   The first instance of your searched text is highlighted in the current page.
5. Choose **Tools»Find Next** to find the next instance of the searched text.

Searching all pages

♦ To search all M-Business Client Channel pages

1. Start M-Business Client.
2. Choose **Tools»Find**.

   The M-Business Find dialog is displayed. See “Searching the current page only” on page 145.
3. Select **in all pages.**
4. Enter the words to search for in the text field, then tap **OK**.

A search results page appears, showing found instances by page and search progress.

5. Choose **Find More** to continue searching.

   When all pages have been searched, an << **end of search** >> message is displayed on the last search page.

6. Tap a highlighted instance to go to the page and the line where the instance occurs.

7. Tap the **Back** button to return to the results page.

Working with text

M-Business Client provides cut, copy, and paste functions for working with text in channels, web pages, and forms, and for moving text between M-Business Client and other device applications.

Using the copy and paste feature

You can copy selected text from online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as Pocket Word) on your device.

Note
You cannot use copy and paste functions in M-Business Client dialogs.

♦ To use the copy and paste feature

1. On your device, open a channel or web page.
2. To copy specific text within the page, drag your stylus to select the text you want to copy.

   Note
   In order to select portions of text within a channel or web page using your stylus, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text selection, see "Setting preferences" on page 141.

3. To copy an entire page, choose **Tools»Select All**.
4. Choose **Tools»Copy**.

   The selected text is copied to the device clipboard; now it can be pasted into other pages or device applications.

5. Open the application or page that you want to paste the copied text into, tap where you want to paste, then choose **Tools»Paste**.

Using the cut and paste feature

You can cut selected text from form fields in online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as CE Word) on your device.

Note
You cannot use cut and paste functions in M-Business Client dialogs or HTML content.

♦ To use the cut and paste feature

1. On your device, open a channel or web page.
2. In a form field, drag your stylus to select the text you want to cut.

> **Note**
> In order to select portions of text within a channel or web page, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text-selection, see "Setting preferences" on page 141.

3. Choose **Tools»Cut**.

   The selected text is cut and copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page into which you want to paste the copied text, tap where you want to paste, then choose **Tools»Paste**.

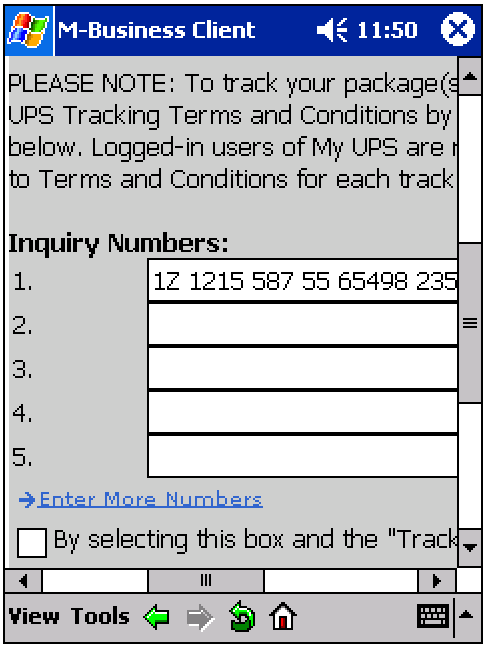
Using HTML forms

Submitting HTML forms while offline

When submitting a form, keep in mind the options in the Tools menu for working with text. These functions are especially useful for filling out forms. See "Working with text" on page 147 for instructions.

♦ To submit HTML forms in M-Business Client while offline

1. Fill out the form.



2. Tap the **Submit** button. (This button might be labeled something else, like **OK** or **Update**.)

   M-Business Client displays a message saying the form will be submitted on the next synchronization.

3. Tap **OK**.

   The form has been added to the Forms Manager queue.

> **Note**
> You can use the Forms Manager to view the status of the submitted form. For instructions, see "Using the Forms Manager" on page 150.

4. Synchronize your mobile device to send the form to the website.

   See the documentation that came with your mobile device for instructions.

Displaying the response

M-Business Server may respond to a form submission in one of two ways:

- The server may alter the channel pages that you initially downloaded.

  For example, suppose you subscribe to a financial channel and, every time you synchronize, your channel updates a page that shows the current prices of a list of stocks you had selected earlier. You might submit a form to change the list of stocks you want to watch. In this case, the server responds by changing the page that displays the current prices to reflect your new list. To look at the server's response, select the channel.

- The server may send down a separate response page.

  Suppose you submit a form to the same channel, but this time you want to buy shares of a stock. There are no channel pages to alter. Instead, the server downloads a new response page to the Forms Manager confirming your order.

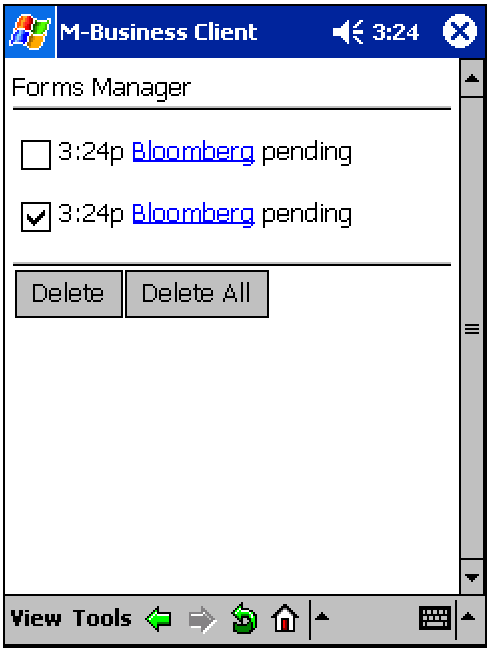
Using the Forms Manager

Accessing the Forms Manager

♦ To access the Forms Manager

1. Start M-Business Client.
2. Choose **View»Forms Manager**.

   M-Business Client displays a list of forms that you have submitted or are going to submit during the next synchronization. If a form was submitted successfully, the word **success** appears to the right of the form's name. Tap **success** to view the response page sent by the channel.



Editing forms in the Forms Manager queue

♦ To edit a form

1. Start M-Business Client.
2. Choose **View»Forms Manager**.

   The Forms Manager appears.
3. In the third column, tap the linked title of the form.

   The form appears.
4. Edit the form.
5. Tap the **Submit** button. (This button might be labeled something else, like **OK** or **Update**.)

   M-Business Client displays a message indicating the forms will be submitted on the next synchronization.
6. Tap **OK**.

Deleting forms in the Forms Manager queue

♦ To delete a form

1. Start M-Business Client.
2. Choose **View»Forms Manager**.

   The Forms Manager appears.
3. Select the checkbox to the left of the form(s) that you want to delete.
4. Tap **Delete**.
5. Tap **OK**.

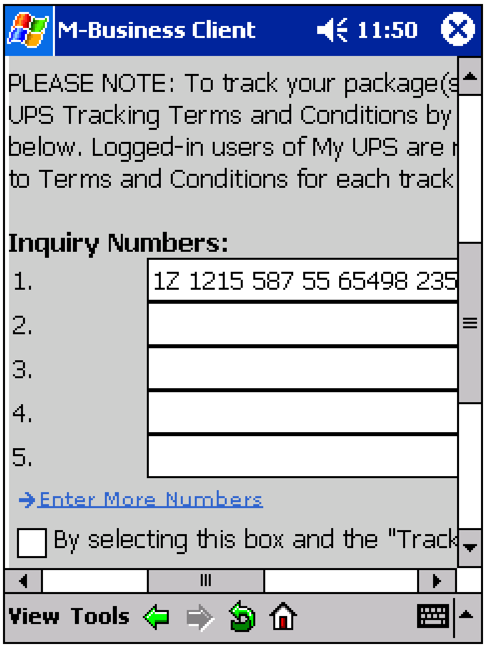
> **Tip**
> Tap **Delete All** to delete all forms in the queue.

Submitting HTML forms while online

If you tap the **Submit** button when you are online (connected to the Internet through a wired or wireless modem or Ethernet card), M-Business Client will use the modem settings you have provided to connect to M-Business Server, then immediately send the forms request to the website. This way, you get an immediate response.

♦ To submit HTML forms in M-Business Client while online

1. Fill out the form.



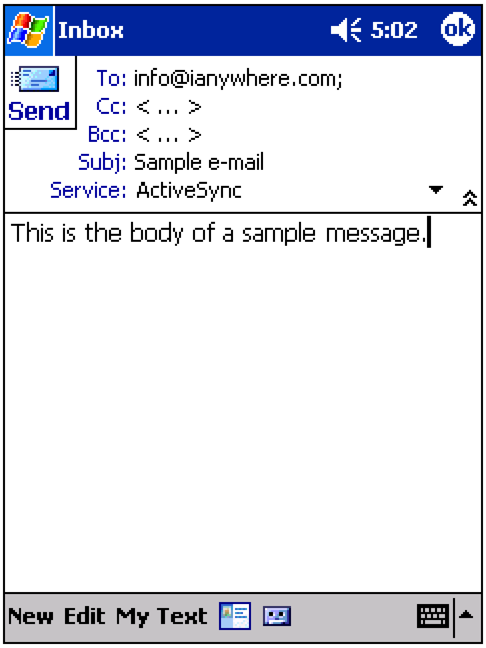
2. Tap the **Submit** button. (This button might be labeled something else, like **OK** or **Update**.)

   The form is sent to the website, the website responds, and the response is downloaded to your mobile device.

Email integration: Launching email from a web page

You can launch your Pocket Outlook or Inbox email application from a web page. To do this, tap an email link in a web page on your device.

Your Inbox application launches, and a new message appears. The **To:** field is automatically populated with email address from the link you clicked. Depending on how the email link was configured, the **Subject:** field also may populate.



Phoneto integration: Launching a dialer application from a web page

Use the `phoneto` link to launch a configured dialer application, with the telephone number automatically filled in, from a device web page. An example of the HTML markup for a `phoneto` link is as follows.

```
<a href=phoneto:18005551212>Toll-free directory assistance</a>
```

On your device screen, a `phoneto` link looks just like any other link, but the link text should make it clear that this link makes a phone call.

♦ To launch a dialer application from a web page

1. Tap the telephone number link on the device.
2. The dialing will initiate automatically.

> **Note**
> You will get an error message if the device does not contain an integrated telephone. The error message will display the telephone number that was selected, so the user could then manually dial this telephone number on another device.

Synchronizing remotely

Note
M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Using a modem to synchronize

Before you can use M-Business Client with a modem (or other wireless connection), you need to make sure that the modem or other device is configured properly and that you have network access to your Internet Service Provider (ISP). Refer to your modem manufacturer's documentation to configure your modem and network access.

To access M-Business Server, M-Business Client uses the settings in M-Business Connect. If you can connect to your ISP but you are unable to access M-Business Server, check the M-Business Connect settings. See "Setting server information" on page 127.

Note
To synchronize with a cradle from your desktop, use the Microsoft ActiveSync software installed on your desktop.

Modem synchronizing in M-Business Client

♦ **To use a modem to synchronize**

1. Start M-Business Client.
2. Choose **Tools»Sync**.

   M-Business Client automatically accesses the modem and connects to M-Business Server.

Modem synchronizing in M-Business Connect

An alternate method of synchronizing involves using M-Business Connect.

♦ **To use M-Business Connect to synchronize**

1. Choose **Start»Settings**, tap the **Connections** tab, then tap **M-Business Connect**.

2. Tap the **Servers** tab.

3. Tap **Sync All**.

   M-Business Connect accesses the modem and connects to M-Business Server.

Using an Ethernet card to synchronize

Before you can use M-Business Client with an Ethernet card (or other network connection), you need to make sure that the Ethernet card is configured properly to allow you network access. Refer to your manufacturer's documentation for information on configuring your Ethernet card and network access.

To access M-Business Server, M-Business Client uses the settings in M-Business Connect. If you can connect to your ISP but you are unable to access M-Business Server, check the M-Business Connect settings. See "Setting server information" on page 127.

The exact steps for synchronizing to M-Business Server using an Ethernet card may vary depending on the type of Ethernet card you use.

♦ To synchronize with M-Business Server

1. Install M-Business Client software on your desktop computer, then synchronize to install the software on your mobile device.

2. Follow the installation manual for configuring the Ethernet card on your device.

> **Note**
> Most cards automatically will assign you an IP address.

3. Open M-Business Client, then choose **Tools»Server Options»Sync All** or **Tools»Sync**.

4. Once the card is properly installed, clicking on any link leading to a page not on the device will cause M-Business Client automatically to retrieve and deliver that page to you.

Browsing online

Windows Mobile Pocket PC devices have an **Open Page** feature that includes **History** and **Bookmark** select lists to enable online browsing to a specific URL.

The progress bar fills from left to right as data is received by your mobile device. It also displays a count of bytes received. If a **Secure Connection** icon appears beside the progress bar, the data transfer is secure.

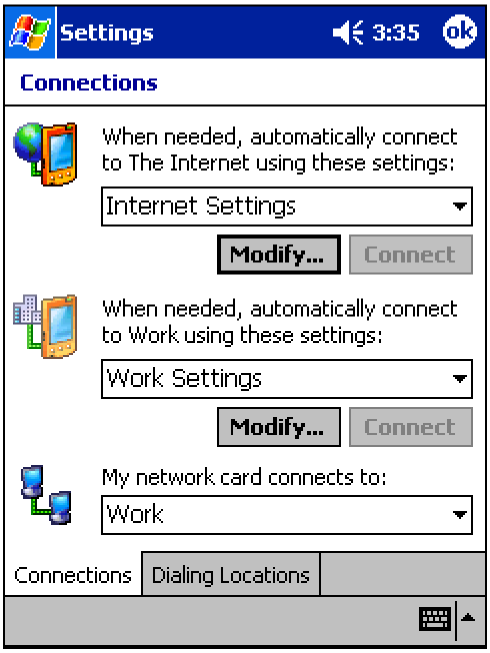
Browsing content

Browsing the Internet or your corporate intranet

♦ **To browse the Internet or your corporate intranet**

1. Choose **Start»Settings**, then tap the **Connections** tab.
2. Tap the **Connections** icon.

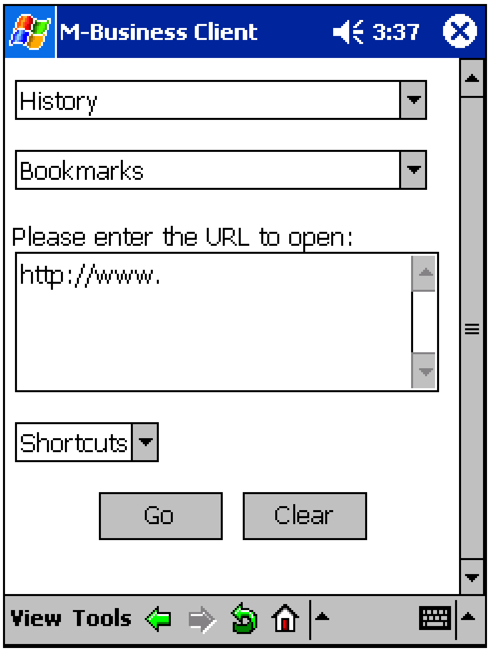
   The Connections Settings page opens.
3. Select a connection option from the list.
4. If necessary, set up the connection to use your modem, wireless card, or other device. Tap the **Modify** button to configure the connection.



Browsing to a specific URL

♦ To browse to a specific URL

1. In M-Business Client, choose **View»Open Page**.
2. In the text field, enter the URL of the page that you want to open, or select a URL from the **History** or **Bookmark** drop-down list.



3. Tap **Go.**

   The requested page appears.

Reloading a page

Invoke the Reload Page command by tapping the following icon. When you are connected to the Internet, you can use the Reload Page command to update the contents of a page. When you are offline, you can use the command to clear form data.

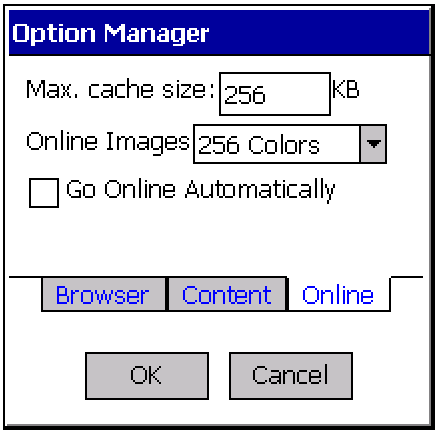
Setting bit depth for online images

M-Business Client downloads online images at a default bit depth of four grays. Depending on which mobile device you use, the image quality you want, and the speed of your online connection, you may choose to download images at another bit depth, or not to download images at all.

♦ To change the bit depth on your device

1. Choose **Tools»Options**.
2. Tap the **Online** tab to bring it forward.
3. Tap the drop-down list for **Online Images** to see a list of bit depths.

   The bit depth options listed will depend on your mobile device.
4. Select the bit depth you desire.
5. Tap **OK**.

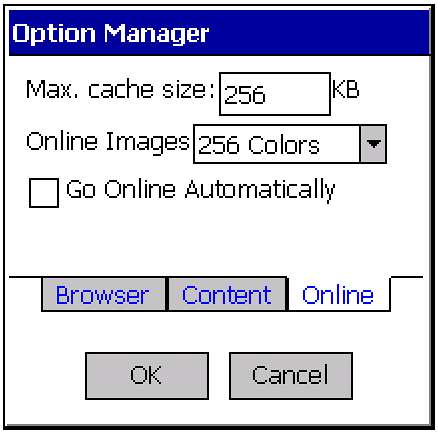


Managing online cache

Defining maximum memory for caching

♦ To define the amount of memory used for caching on your device

1. Choose **Tools»Options**.
2. Select the **Online** tab.



3. Specify the **Max. cache size** on your mobile device.

> **Note**
> The default cache size is 256K.

4. Tap **OK**.

Deleting a page from the online cache

If you are browsing online, M-Business Client caches the pages it already has displayed. See “Managing online cache” on page 78. You can remove individual pages from the cache to free up space.

♦ To delete a page from the online cache on your device

1. In M-Business Client, choose **View»Online Cache Manager.**

   M-Business Client displays a list containing the pages in the cache.
2. Select the checkboxes beside the pages you want to delete from the cache, or tap **Select All**.
3. Tap **Delete**.

4. Tap **OK**.

   The selected pages are removed from the cache.

> **Note**
> Although the cache shows 0K used, the contents of the cache are not entirely cleared until you connect your device to the server, either by cradle synchronizing with your desktop or by modem synchronizing.

Using on-device help

You can access on-device help in both M-Business Client and M-Business Connect.

Accessing on-device help in M-Business Client

♦ To access on-device help in M-Business Client

1. Start M-Business Client.
2. Choose **Start»Help**.

   The Help page appears.
3. Tap a linked topic to view its contents.
4. To close the Help page, tap **OK**.

Accessing on-device help in M-Business Connect

♦ To access on-device help in M-Business Connect

1. Start M-Business Client.
2. Choose **Tools»Server Options**.

   The M-Business Connect application appears.
3. Choose **Start»Help**.

   The Help page appears.
4. Tap a linked topic to view its contents.
5. To close the Help page, tap **OK**.

Part VI. M-Business Client on Windows XP

CHAPTER 10

Configuring a server connection on Windows XP

Contents

> **Note**
> This chapter also applies to Windows Vista devices.

Opening M-Business Client on your Windows XP device

To open M-Business Client on your Windows XP device, choose **Start»All Programs»M-Business Client»M-Business Client**.

To open M-Business Connect on your Windows XP device, choose **Start»All Programs»M-Business Client»M-Business Connect**.

You also can open M-Business Connect from within M-Business Client by choosing **Tools»Server Options**.

Setting server information

Configuring a new server connection

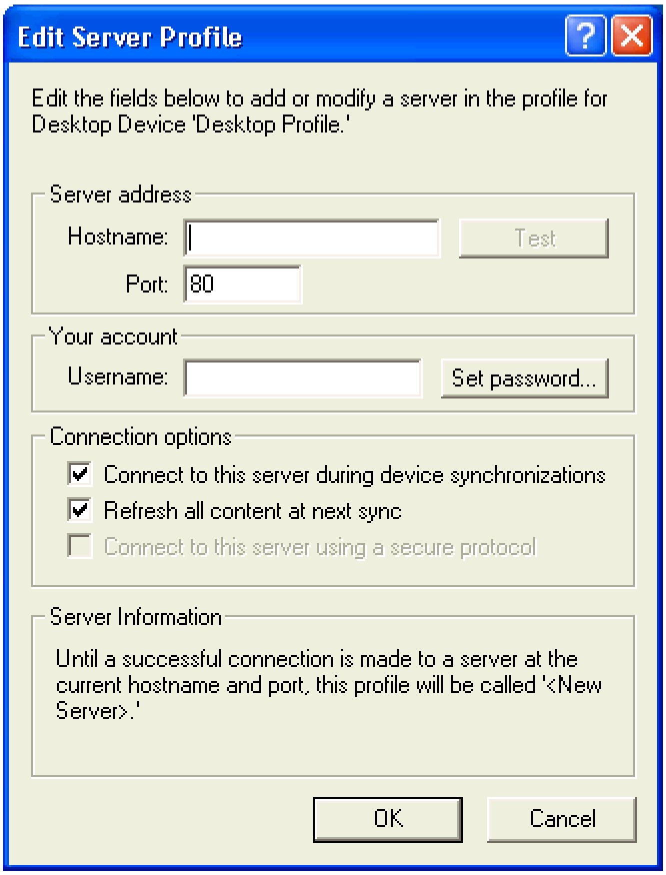
♦ To configure a new server connection

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

2. Select the **Servers** tab, then click or tap **Add**.

   The Edit Server Profile dialog appears.



3. Enter your information in the **Hostname**, **Port**, and **Username** fields.

4. Click or tap the **Set password** button, enter your password, then click or tap **OK**.

5. Click or tap **OK** to close the Server Profile dialog.

The next time you synchronize, you will be able to view content from the new server.

Editing a server connection

♦ To edit a server connection

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings** box.
3. Click or tap the **Properties** button.

   The Edit Server Profile dialog appears. Modify the **Server Address Hostname**, **Port**, and/or **Username** fields. To edit the account password, click or tap the Set Password button, enter a new password, and click or tap **OK**.

4. Click or tap **OK**.

Refreshing all content from a server

♦ To refresh all content from a server

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings...** box.
3. Click or tap the **Properties** button.

   The Edit Server Profile dialog appears.

4. Check the **Refresh all content at next sync** checkbox.
5. Click or tap **OK**.

The next time you synchronize, all content will be refreshed.

Updating your password

After changing your password on M-Business Server, you must update M-Business Connect with the new password. See "Changing your password" on page 47.

> **Note**
> If M-Business Server is integrated with a Microsoft Windows NT domain, your password must be the same as your Windows domain password.

♦ To update M-Business Connect with your new password

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings** box.
3. Click or tap the **Properties** button.

   The Edit Server Profile dialog appears.

4. Click or tap the **Set password** button, enter your password, then click or tap **OK**.
5. Click or tap **OK** to close the Edit Server Profile dialog.

   Your new password will be active the next time you synchronize.

Adding a proxy server connection manually

You may need to add a proxy server connection manually, either when Autodetect is unsuccessful or when some of the servers that you access with M-Business Connect should use proxy settings, while others should not. See “Configuring proxy server settings” on page 49.

♦ To configure a connection to your proxy server from your device

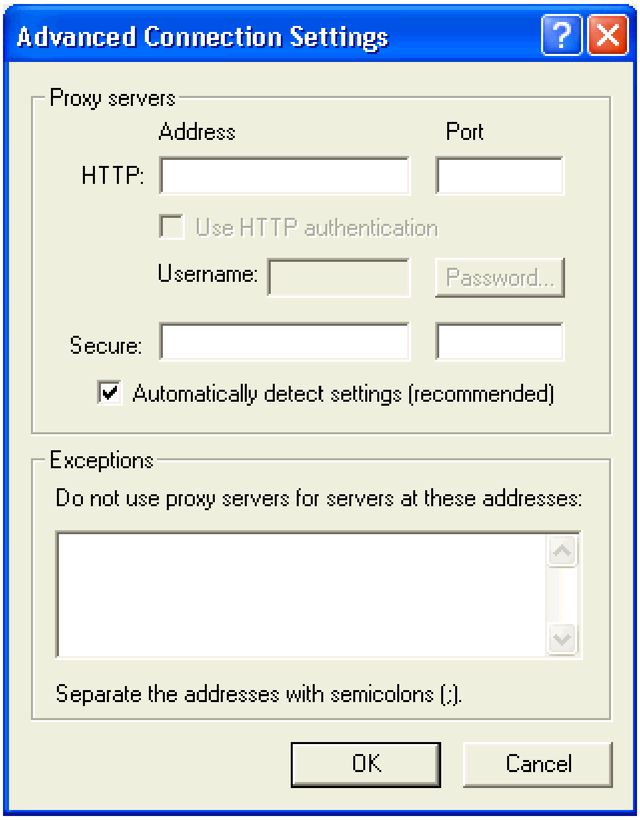
1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

> **Note**
> You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the **Connection** tab.
3. On the connection tab, you can select **Default** (no proxies) or **Microsoft Internet Explorer** (to use the same proxy settings as internet explorer).
4. To set or change Proxy settings manually, click or tap the **Change** button.

   The Advanced Connection Settings dialog appears.



5. Enter the necessary information in the Advanced Connection Settings dialog.

   Your system administrator has all the necessary information.

6. If your proxy server uses the HTTP protocol, enter information in the **HTTP Address** and **Port** fields.

7. To enter a user name and password for the server you entered in the Address field, select **Use HTTP authentication** and enter a user name in the **Username** box. Click or tap the **Password** button, enter a password, then click or tap **OK**.

8. If your proxy server uses a secure protocol, enter information in the **Secure Address** and **Port** fields.

9. Enter exceptions to the HTTP settings in the **Exceptions** field. Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the hostnames of servers that M-Business Connect should access without going through the proxy server.

10. Click or tap **OK** to close the Advanced Connection Settings dialog.

Enabling a secure connection to a server

♦ To enable a secure connection to a server

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings** box.
3. Click or tap the **Properties** button.

   The Edit Server Profile dialog appears.

4. Select the **Connect to this server using a secure protocol** checkbox.

   The Connect to this server using a secure protocol checkbox is normally grayed out, and can only be checked after the server in the Server address field confirms that it can provide a secure connection to the device. The server confirms this during the first synchronization, or when you test the connection in M-Business Connect. See “Configuring a new server connection” on page 169.

5. Click or tap **OK**.

Disabling and removing server connections

To understand why you would disable or remove a server connection, see “Disabling and removing server connections” on page 54.

Disabling and re-enabling a server connection

♦ To disable and re-enable a server connection

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings** box.
3. Click or tap the **Properties** button.
4. The Edit Server Profile dialog appears.
5. Clear the **Connect to this server during device synchronizations** checkbox.

   To re-enable the server connection, select the **Connect to this server during device synchronizations** checkbox.

6. Click or tap **OK**.

Removing a server connection

♦ To remove a server connection

1. Choose **Start»All Programs»M-Business Client»M-Business Connect**.

   The M-Business Connect screen appears.

   > **Note**
   > You also can get to this screen from within M-Business Client by choosing **Tools»Server Options**.

2. Click or tap the name of the server in the **Server settings** box.
3. Click or tap the **Remove** button.

   The Confirm Server Removal dialog appears.

4. Click or tap **OK**.

CHAPTER 11

Using M-Business Client on Windows XP

Contents

Note
This chapter also applies to Windows Vista devices.

Understanding the basics

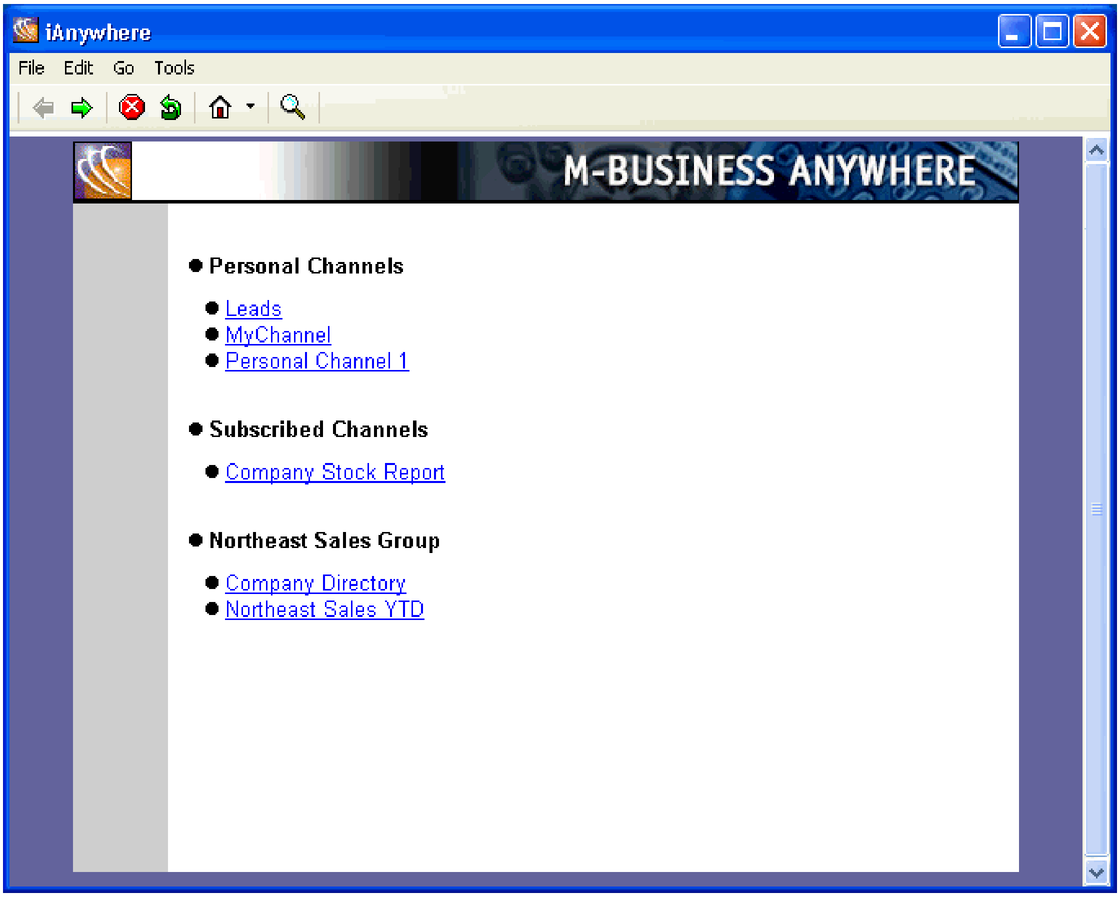
This section describes what you need to know to get started using M-Business Client.

Viewing channels

M-Business Client provides a browser that you can use to view channels.

M-Business Client Home Page

If you have added channels to your account on M-Business Server and performed a synchronization, the M-Business Client home page on your device will look something like this:



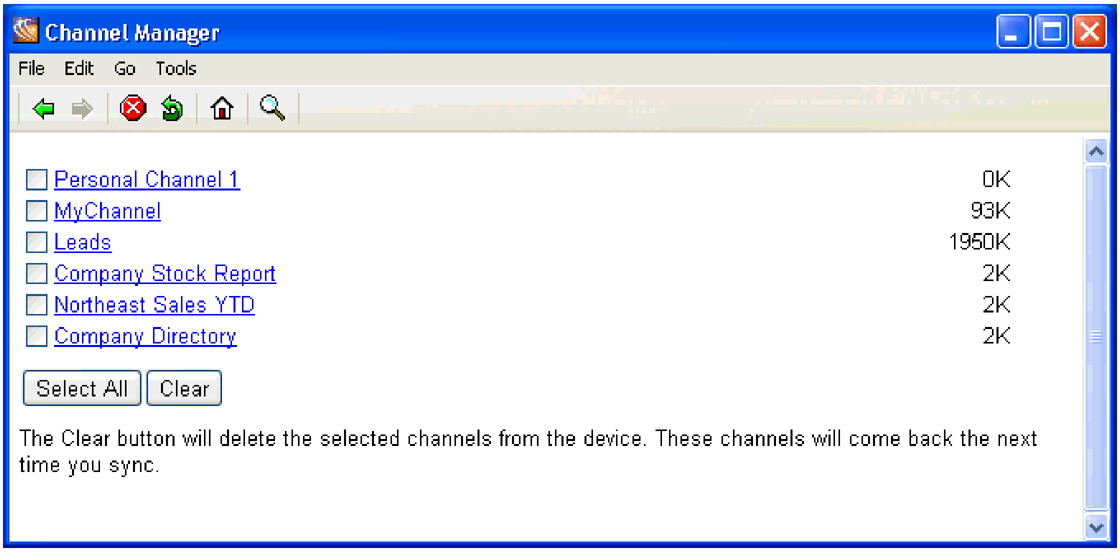
Note
If you do not see any channels, or if you do not see the channels that you expect, see Appendix "Troubleshooting" on page 285.

Temporarily clearing a channel's contents

♦ To temporarily clear a channel's contents

1. Start M-Business Client.
2. Choose **File»Channel Manager**.

   The Channel Manager appears.



3. Select the checkboxes beside the channels that you want to clear, or click or tap **Select All**.
4. Click or tap **Clear**, then click or tap **OK**.

   The selected channel's contents are removed from the device. You still are subscribed to these channels. The channel contents will be restored the next time you synchronize your device.

Navigating in M-Business Client

As navigation tools, M-Business Client on a Windows XP device provides (from left to right in the image below) **Back**, **Forward**, **Stop**, **Reload Page**, and **Home** buttons, followed by a **Servers** drop-down list and a **Find** button. URLs are underlined.

The Server Manager link allows you to switch between content synchronized from accounts on different servers, or between different accounts on the same server.

- **Back** goes back to the page that was displayed before the current page in the browse sequence.
- **Forward** goes forward to the page that was displayed after the current page in the browse sequence.
- **Stop** cancels the M-Business Client operation in progress.
- **Reload Page** gets a fresh copy of the current page from the web server. This is only available when the device is in online mode.
- **Home** displays the M-Business Client home page for the currently selected server.
- **Servers** drop-down list switches between content synchronized from accounts on different servers, or between different accounts on the same server.
- **Find** searches for text you enter.

Setting preferences

You can set preferences to control whether tables and images are displayed in HTML pages, whether to run JavaScript, what fonts are used, and how M-Business Client works.

Using the Option Manager

The following table describes the features of the Option Manager on a Windows XP device.

Table 1. Option Manager preferences for Windows XP OS

Field	Enables/disables or sets	Additional details
BROWSER TAB		
Dragging cursor	What happens when you drag the stylus or left-click dragging with the mouse pointer	With **scrolls** selected, dragging scrolls the content window; with **selects**, dragging selects text in the content window. See “Working with text” on page 104.
Minimum font size	The minimum font size in which text is displayed.	Select **None** (the default) to leave font size under page control. Select **Small**, to allow the smallest text to be displayed in the smallest size. Select **Medium** to force the smallest text to be displayed in the medium size. Select **Large** to force all text to be displayed in the largest size.

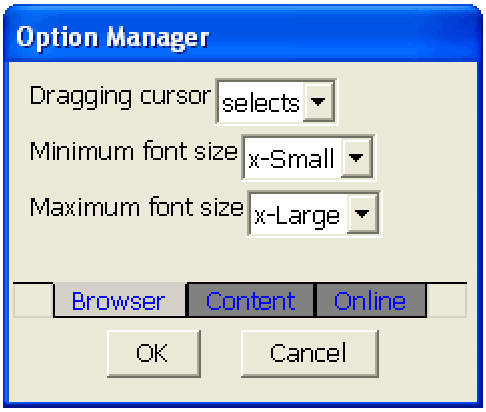
Field	Enables/disables or sets	Additional details
Maximum font size	The maximum font size in which text is displayed.	Select **None** (the default) to leave font size under page control. Select **Large**, to allow the largest text to be displayed in the largest size. Select **Medium** to force the largest text to be displayed in the medium size. Select **Small** to force all text to be displayed in the smallest size.
CONTENT TAB		
Show Tables	Showing tables for pages that are not specifically designed for M-Business Client.	If you choose not to display tables, you still get the text from the tables, but the text will not appear in a table.
Show Images	Synchronizing images.	If you choose not to display images, they are not synchronized at all. Electing not to display images saves memory on your device.
Enable JavaScript	The display on the device of pages containing JavaScript that have not been marked with the HTML <HandheldFriendly> tag (not written specifically for M-Business Client).	For more information on using JavaScript, contact your system administrator. **Note:** This preference option only appears in the Application Edition and Web Edition Pro versions of M-Business Client.
Show JavaScript Errors	The display of an error message when JavaScript causes an error or does not function properly	Show JavaScript Errors is a useful debugging tool for channel developers, but it does not provide useful information for most users.
ONLINE TAB		
Max Cache	The maximum size in KB of pages stored in the memory cache on your device.	See "Managing online cache" on page 201.
Online Images	Image bit depth when browsing online.	See "Setting bit depth for online images" on page 200.
Go Online Automatically	The device to automatically go online when you try to open or link to a page which is not on the device, while the device is offline.	If not enabled, you will receive a notifier that the page you linked to is not available on your device.

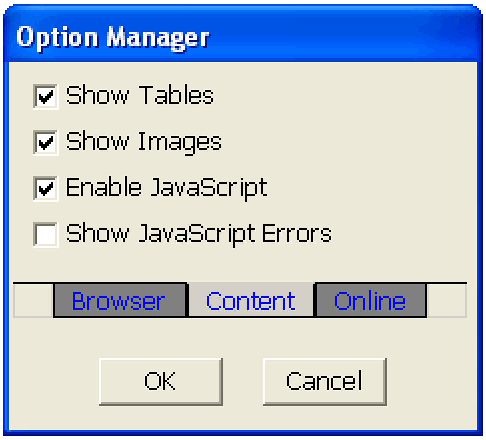
♦ To set preferences

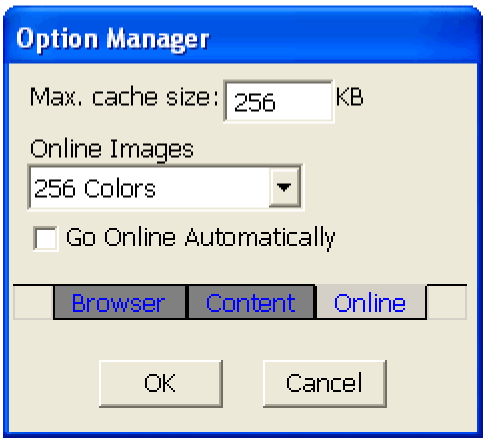
1. Choose **Tools»Options**.

The Option Manager is displayed, with the Browser tab active.

2. Click or tap the tabs to display different sets of options.







3. Select or clear the checkboxes beside your preferences.

4. Click **OK**.

Selecting the server that delivers content

♦ To switch servers on your mobile device when M-Business Client is configured for multiple servers

1. Start M-Business Client.
2. Click or tap the **Server** drop-down list. For help locating the Server drop-down list, see "Navigating in M-Business Client" on page 179.
3. Tap or click the server you want to switch to.

   M-Business Client displays the home page for the server.

Searching to find content in M-Business Client

From within M-Business Client you can choose to search either the current channel page only, or all M-Business Client channel pages stored on your mobile device.

Searching the current page only

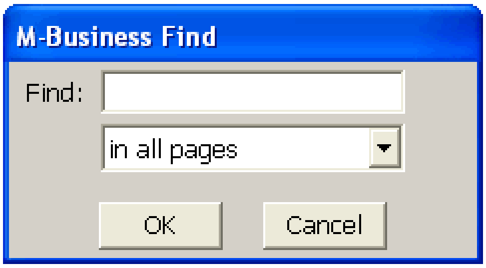
♦ To search the current page only

1. Open a channel page in M-Business Client.

   The M-Business Find dialog is displayed.

2. Click or tap the **Find** icon, or choose **Tools»Find**.

3. Select **in page.**



4. Enter the words to search for in the **Find** field, then click or tap **OK**.

   The browser window scrolls to the first instance of the word you searched for, and the word is highlighted.

5. Choose **Tools»Find Next** to find the next instance of the searched text.

Searching all pages

♦ To search all M-Business Client channel pages

1. Start M-Business Client.

2. Click or tap the **Find** icon, or choose **Tools»Find.**

   The M-Business Find dialog is displayed.

3. Select **in all pages.**

4. Enter the words to search for in the text field, then click or tap **OK**.

   A search results page appears, showing found instances by page and search progress.

5. Click or tap Find More to continue searching.

   When all pages have been searched, an << **end of search** >> message is displayed on the last search page.

6. Click or tap a highlighted instance to go to the page and the line where the instance occurs.

7. Click or tap the **Back** button to return to the results page.

Working with text

M-Business Client provides cut, copy, and paste functions for working with text in channels, web pages, and forms, and for moving text between M-Business Client and other device applications.

Using the copy and paste feature

You can copy selected text from online documents or web pages to the Windows clipboard, then paste that selected text onto another form or into another application (such as Notepad or Word) on your device.

> **Note**
> You cannot use copy and paste functions in M-Business Client dialogs.

♦ To use the copy and paste feature

1. On your device, open a channel or web page.
2. Drag your stylus, or left-click-drag your mouse pointer, to select the text you want to copy; or select the entire page by choosing **Edit»Select All.**

   > **Note**
   > In order to select portions of text within a channel or web page using your stylus or mouse, **Dragging cursor** must be set to **selects** in your preferences. For information on how to enable text selection, see "Setting preferences" on page 97.

3. Choose **Edit»Copy**.

   The selected text is copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page that you want to paste the copied text into, click or tap where you want to paste, and choose **Edit»Paste**.

Using the cut and paste feature

You can cut selected text from form fields in online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as Notepad or Word) on your device.

> **Note**
> You cannot use cut and paste functions in M-Business Client dialogs or HTML content.

♦ To use the cut and paste feature

1. On your device, open a channel or web page.
2. In a form field, drag your stylus, or left-click-drag your mouse pointer, to select the text you want to cut.

> **Note**
> In order to select portions of text within a channel or web page, **Dragging cursor** must be set to **selects** in your preferences. For information on how to enable text-selection, see "Setting preferences" on page 180.

3. Choose **Edit»Cut**.

   The selected text is cut and copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page into which you want to paste the copied text, click or tap where you want to paste, and choose **Edit»Paste**.

Using HTML forms

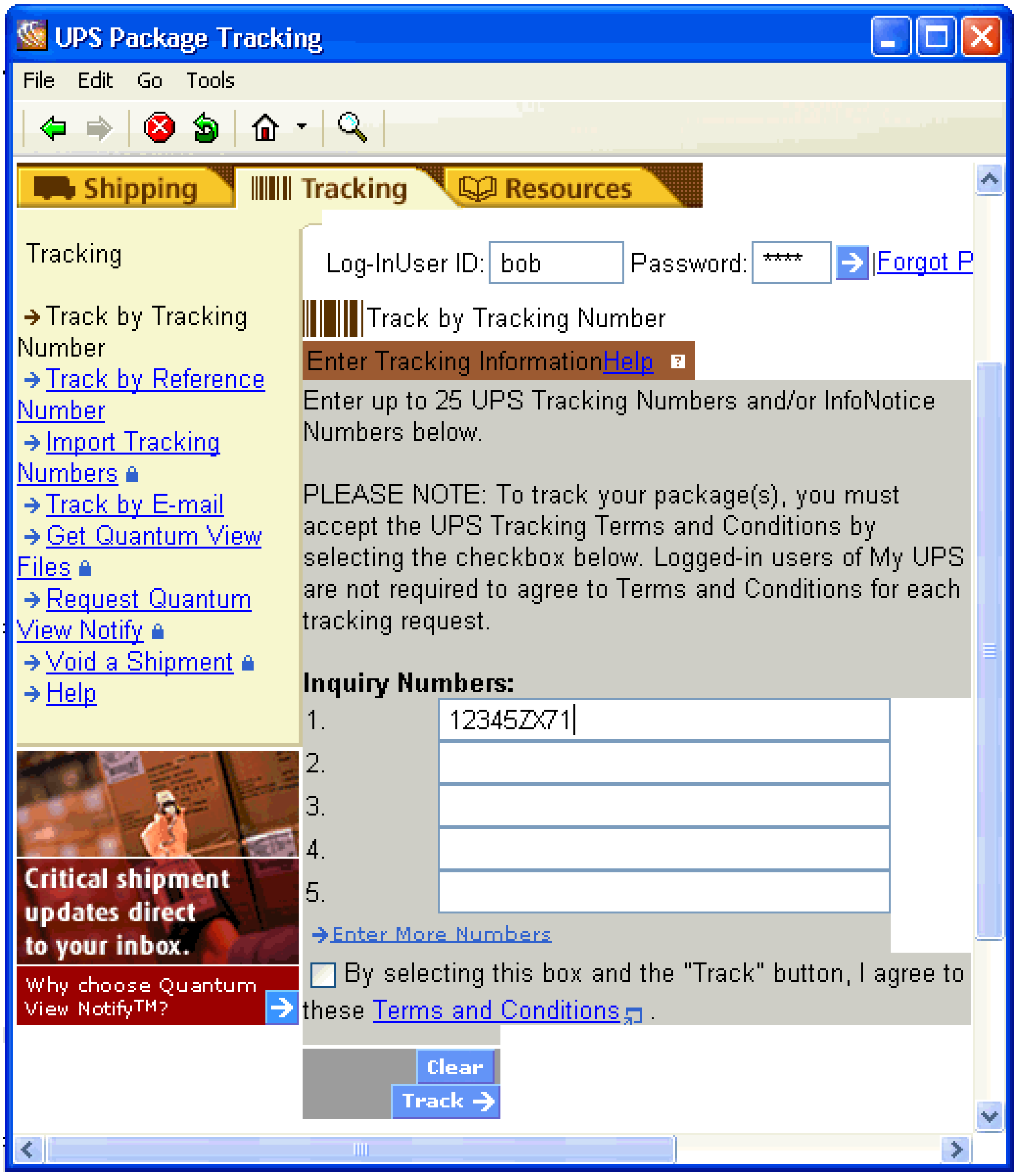
This section describes what you need to know to get started filling out and submitting HTML forms while using M-Business Client.

Submitting HTML forms while offline

Note
When filling out a form, you may find the copy and paste feature especially useful. See "Working with text" on page 186.

♦ To submit HTML forms in M-Business Client while offline

1. Fill out the form.



2. Click or tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message saying the form will be submitted on the next synchronization.

3. Click or tap **OK**.

   The form has been added to the Forms Manager queue.

> **Note**
> You can use the Forms Manager to view the status of the submitted form. See "Using the Forms Manager" on page 190.

4. Synchronize your mobile device to send the form to the website.

Displaying the response

M-Business Server may respond to a form submission in one of two ways:

- The server may alter the channel pages that you initially downloaded.

  For example, suppose you subscribe to a financial channel and every time you synchronize, your channel updates a page that shows the current prices of a list of stocks you had selected earlier. You might submit a form to change the list of stocks you want to watch. In this case, the server responds by changing the page that displays the current prices to reflect your new list.

  To look at the server's response, select the channel.

- The server may send down a separate response page.

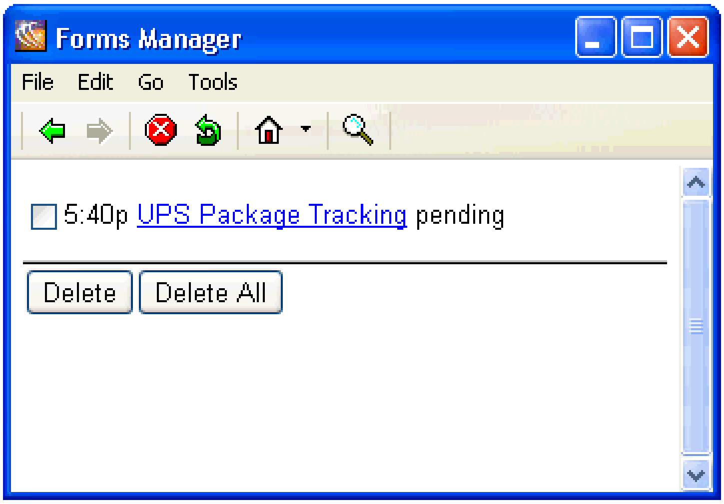
  Suppose you submit a form to the same channel, but this time you want to buy shares of a stock. There are no channel pages to alter. Instead, the server downloads a new response page to the Forms Manager that confirms your order.

Using the Forms Manager

Accessing the Forms Manager

♦ **To access the Forms Manager**

1. Start M-Business Client.
2. Choose **File»Forms Manager**.



M-Business Client displays a list of forms that you have submitted or are going to submit during the next synchronization.

If a form was submitted successfully, the word **success** appears to the right of the form's name.

You can click or tap **success** to view the response page.

Editing forms in the Forms Manager queue

♦ To edit a form

1. Start M-Business Client.
2. On the M-Business Client home page, click or tap the **Forms Manager** link.

   The Forms Manager appears.

   > **Tip**
   > You also can access the Forms Manager by choosing **File»Forms Manager**.

3. Click or tap the linked title of the form.

   The form appears.

4. Edit the form.
5. Click or tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message indicating the form will be submitted on the next synchronization.

6. Click or tap **OK**.

Deleting forms in the Forms Manager queue

♦ To delete a form:

1. Start M-Business Client.
2. On the M-Business Client home page, click or tap the **Forms Manager** link.

   The Forms Manager appears.

> **Note**
> You also can access the Forms Manager by choosing **File»Forms Manager**.

3. Check the checkbox to the left of the form(s) that you want to delete.
4. Click or tap **Delete**.
5. Click or tap **OK**.

> **Tip**
> To delete all forms in the queue, click or tap **Delete All**.

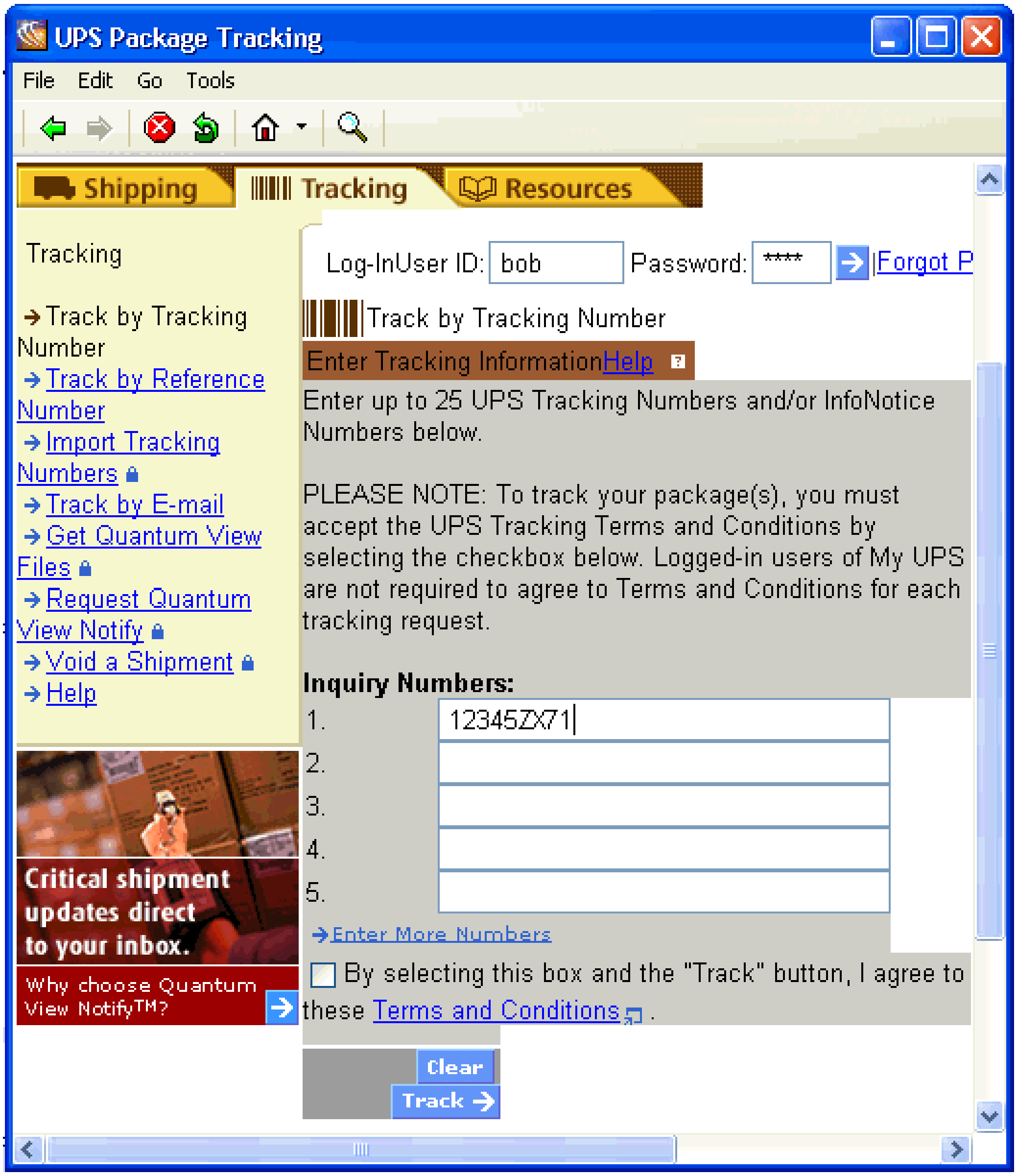
Submitting HTML forms while online

When submitting a form, keep in mind the options on the Edit menu. These menus are especially useful for filling out forms. The Cut, Copy, and Paste options apply to channel pages and the contents of forms. You cannot apply these options to M-Business Client dialogs, but you can apply these options between channel pages.

For information using the Copy and Paste feature, see "Working with text" on page 186.

♦ To submit HTML forms in M-Business Client while online

1. Fill out the form.



2. Click or tap the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   The form is sent to the website, the website responds, and the response is downloaded to your mobile device.

Email integration: Launching email from a web page

You can launch your email application from a web page on your device. When you tap an email link in a web page on your device, your default e-mail application is opened. A new email is automatically addressed.

♦ **To launch email from a web page**

1. In a web page on your device, click or tap an email link.

   Your email application launches.

2. Type the new email message, and send it as you normally do.

When you are finished, you can return to M-Business Client.

Phoneto integration: Launching a dialer application from a web page

Use the `phoneto` link to launch a configured dialer application, with the telephone number automatically filled in, from a device web page. An example of the HTML markup for a `phoneto` link is as follows.

```
<a href=phoneto:18005551212>Toll-free directory assistance</a>
```

On your device screen, a `phoneto` link looks just like any other link, but the link text should make it clear that this link makes a phone call.

♦ To launch a dialer application from a web page

1. Tap the telephone number link on the device.
2. The dialing will initiate automatically.

> **Note**
> You will get an error message if the device does not contain an integrated telephone. The error message will display the telephone number that was selected, so the user could then manually dial this telephone number on another device.

Synchronizing remotely

> **Note**
> M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
> If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Using a modem or other networking device to synchronize

On your device, you can synchronize with M-Business Server either from within M-Business Client or from within M-Business Connect.

The exact steps involved in configuring a modem (or other networking device) to work with M-Business Connect depend on your device and the modem you use.

Synchronizing from within M-Business Client

♦ **To synchronize from within M-Business Client**

1. Attach the modem or other networking device.
2. Dial up or connect to your internet service provider (ISP), or a direct access number, in the usual manner.

   See your device or ISP documentation, or your system administrator, for help with connecting to the internet or a direct access number.
3. In M-Business Client, choose **File»Work Online**.

   You can skip this step if you were already online when you started M-Business Client.
4. Choose **File»Sync**.

   M-Business Client automatically accesses the modem or network connection and synchronizes with M-Business Server.

Synchronizing from within M-Business Connect

♦ **To synchronize from within M-Business Connect**

1. Attach the modem or other networking device.
2. Dial up or connect to your internet service provider (ISP), or a direct access number, in the usual manner.

See your device or ISP documentation, or your system administrator, for help with connecting to the internet or a direct access number.

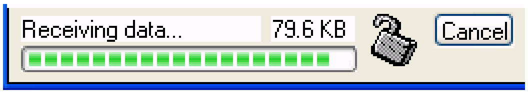
3. Choose **Start»All Programs»M-Business Client»M-Business Connect**, or, from within M-Business Client, choose **Tools»Server Options**.
4. Select the server you want to synchronize in the Server settings for the currently selected device window.
5. Click or tap **Sync All**.

   M-Business Client automatically accesses the modem network connection and synchronizes with M-Business Server.

Browsing online

Windows XP devices have an Open Page feature, including a History select list, to enable online browsing to a specific URL. In addition, the Open Page feature provides a Shortcuts select list for inserting common prefixes and suffixes to Internet addresses. Also included is a Bookmarks feature, allowing you to save your favorite URLs to return to later.

The progress bar fills from left to right as data is received by your mobile device. It also displays a count of bytes received. If a Secure Connection icon appears beside the progress bar, the data transfer is secure.

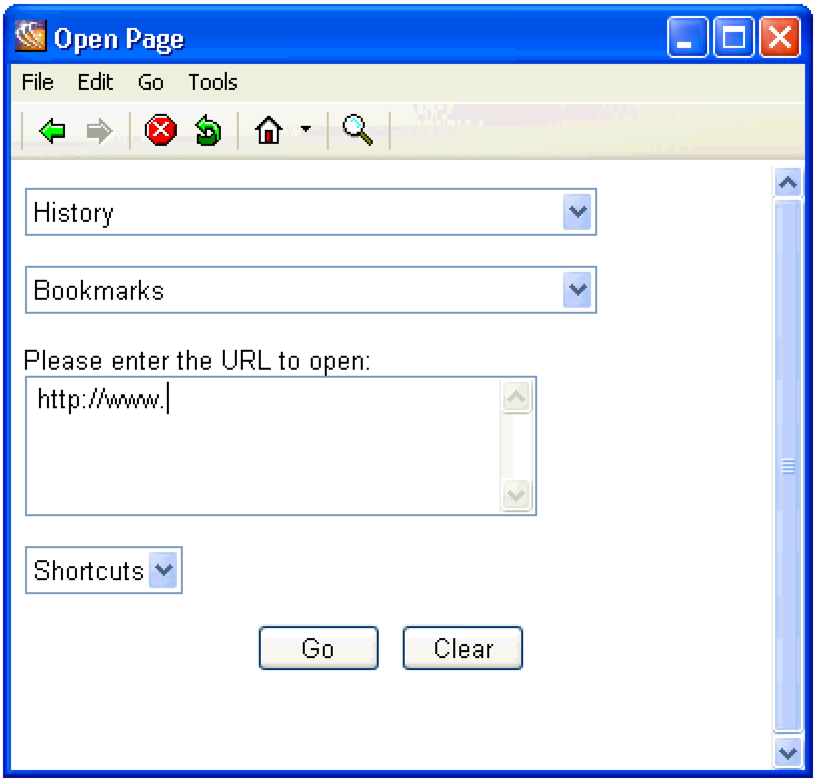


Browsing content

To browse the Internet or your corporate intranet using M-Business Client, click or tap **File»Work Online**.

♦ **To go to a specific URL while browsing online on a Windows XP device**

1. Choose **File»Open Page**.
2. Enter the URL in the **Please enter the URL to open** panel.



3. Click or tap **Go**.

   The requested page will appear.

4. To work in an offline mode (pages will only be loaded from M-Business Client cache), choose **File»Work Offline**.

   Your service connection is closed.

> **Note**
> To configure M-Business Client to switch to online mode when you try to open a page not already downloaded to your device, use the Go Online Automatically feature. See “Setting preferences” on page 180 for more information.

Reloading a page

When you are connected to the Internet in Work Online mode, you can use the Reload Page command to update the contents of a page. When you are in Work Offline mode, you can use the command to clear form data.

On your device, invoke the Reload Page command by choosing **File»Reload Page**; or by tapping or clicking the following icon.

> **Note**
> The icon only works when your device is in Work Online mode.

Setting bit depth for online images

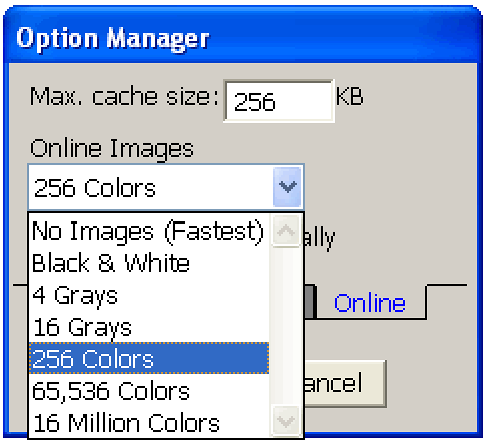
♦ To set bit depth for online images

1. In M-Business Client, choose **Tools»Options**.

   The Option Manager appears.

2. Click or tap the **Online** tab, and click or tap the field under **Online Images** for a pull-down list of bit depths.

   The bit depth options listed will depend on your mobile device.



3. Click or tap **OK**.

> **Note**
> If you select a high bit depth, images downloaded to your device will take up more memory. If you select a low bit depth, images downloaded to your device will take up less memory. High bit depths may also make your synchronizations take more time to complete.

Managing online cache

Defining maximum memory for caching

♦ To define the maximum amount of memory for caching on a Windows XP device

1. In M-Business Client, choose **Tools»Options**.

   The Option Manager appears.

2. Click or tap the **Online** tab

3. Specify the **Max. cache size** in kilobytes.

   Note
   The maximum cache size is 32,000K; the default cache size is 256K.

4. Click or tap **OK**.

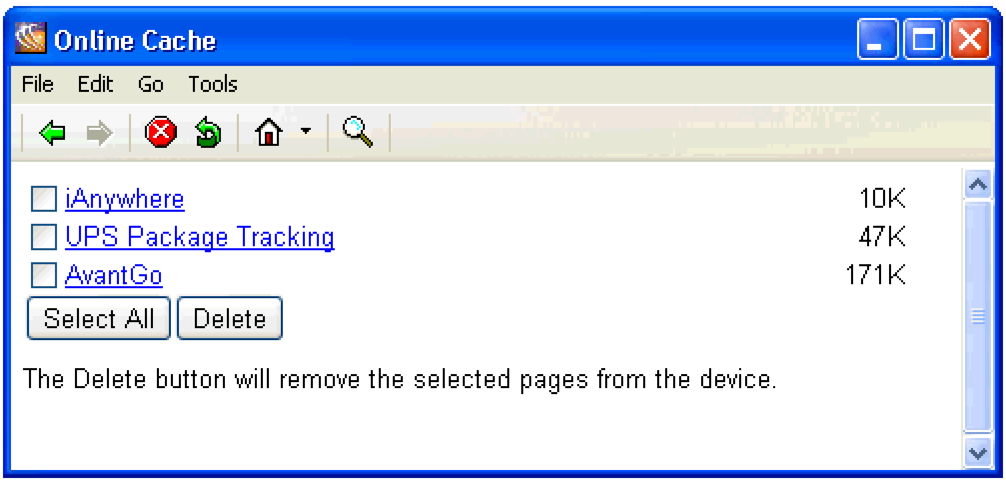
Deleting a page from the online cache

If you are browsing online, M-Business Client caches the pages it already has displayed. See “Managing online cache” on page 78. You can remove individual pages from the cache to free up space.

♦ To delete a page from the online cache on a Windows XP device

1. Choose **File»Online Cache Manager**.

   M-Business Client displays a list containing the titles of any pages in the cache.



2. Check the checkboxes beside the pages you want to delete from the cache, or tap or click **Select All**.
3. Click or tap **Delete**.
4. Click or tap **OK**.

   The page is removed from the cache.

> **Note**
> Although the cache shows `No Online Pages in cache`, the contents of the cache are not cleared entirely until you synchronize.

Part VII. M-Business Client on Windows Mobile 5 or 6, or Microsoft Smartphone

CHAPTER 12

Configuring a server connection on Windows Mobile 5 or 6, or Microsoft Smartphone

Contents

Note
M-Business Client on Windows Mobile 5 or 6 and Microsoft Smartphone and Microsoft devices is similar enough that essentially the same instructions work on either platform. Thus both platforms can be covered together in this chapter.
Since Microsoft Smartphone devices do not have a stylus to "tap" the screen, only the generic terms "choose" and "select" are used here.
In most cases, the screen shots provided are specifically from a Windows Mobile 5 or 6 device.

Opening M-Business Client on your mobile device

Opening M-Business Client

To access M-Business Client on your Windows Mobile 5 or 6, or Microsoft Smartphone device, choose **Start»M-Business Client**.

Opening M-Business Connect

You can open M-Business Connect from within M-Business Client on your Windows Mobile 5 or 6, or Microsoft Smartphone device. Choose **Menu»Options»Server Options**.

Setting server information

Configuring a new server connection

♦ To configure a new server connection

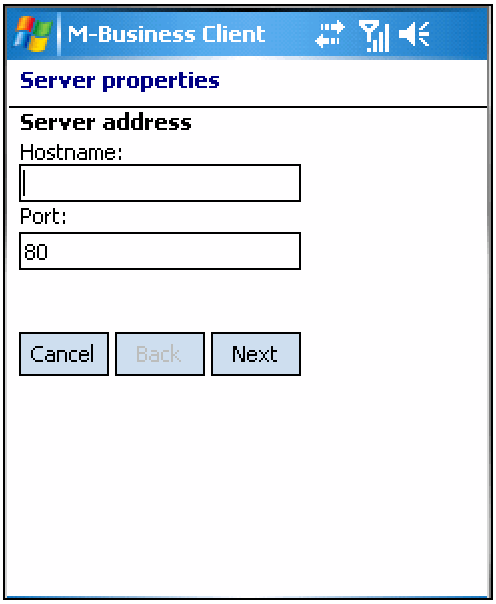
1. From M-Business Client, choose **Menu»Options»Server Options**.

   M-Business Connect opens.

2. Start adding your server connection:

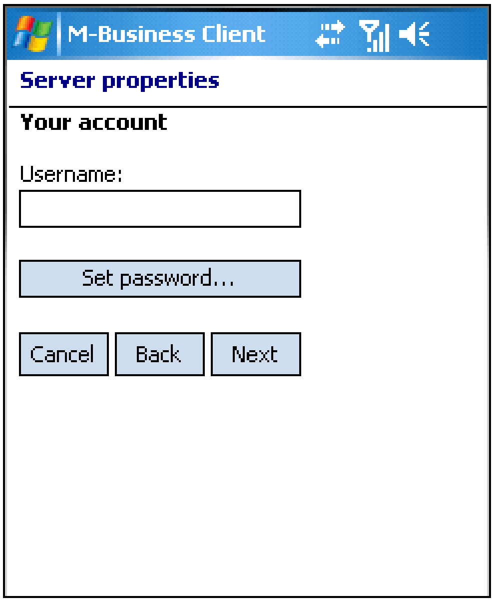
   - **Windows Mobile 5 or 6** — select **Add**.
   - **Microsoft Smartphone** — choose **Menu»Add**.

   The Server Properties dialog is displayed.



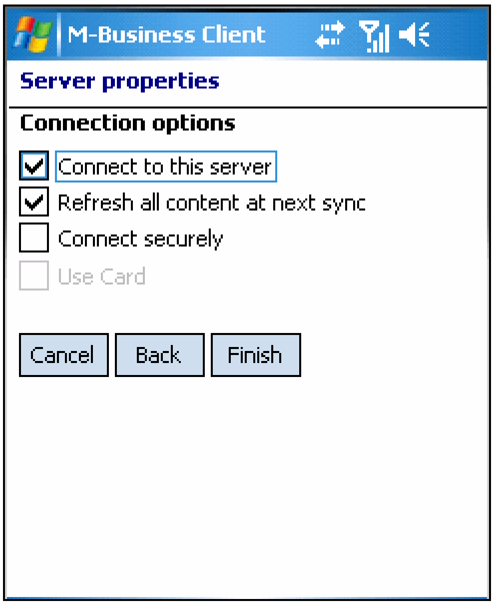
3. Complete the **Hostname** and **Port** fields, and select **Next**.

   The next part of the Server Properties dialog is displayed.



4. Complete the Username field, then select the **Set password** button, enter your password, then select **OK** to close the Password dialog, then select **Next**.

   The third part of the Server Properties dialog is displayed.



5. If you want to connect to this server securely you cannot set that up yet.

The Connect Securely checkbox is unavailable until you synchronize once with the server so that it can confirm that it supports secure connections. Finish configuring other features for this server connection now, then after you synchronize with the server, see "Editing a server connection" on page 209.

6. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

> **Note**
> If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

7. Select **Finish**.

   The next time you synchronize, you will be able to view content from the new server.

Editing a server connection

♦ To edit a server connection

1. Start M-Business Client.
2. Choose **Menu»Options»Server Options**.

   The M-Business Connect screen appears.

3. Under **Server Settings**, select the name of your server, then:

   - **Windows Mobile 5 or 6** — select **Properties**.
   - **Microsoft Smartphone** — choose **Menu»Edit**.

   The Server Properties dialog appears.

4. Modify the **Hostname** and/or **Port** fields, then select **Next**.
5. Modify your **Username** and/or **Password**, then select **Next**.
6. Select the **Connect Securely** checkbox if you want to connect securely to this server, and the server supports secure connections.

   If the server supports secure connections, the Connect Securely checkbox will be available after your first synchronization.

7. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

> **Note**
> If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

8. Modify your Connection Options, then select **Finish**.

   The next time you cradle synchronize, your new settings will appear in M-Business Connect on your desktop.

Refreshing all content from a server

♦ To refresh all content from a server

1. Start M-Business Client.
2. Choose **Menu»Options»Server Options**.

   The M-Business Connect screen appears.
3. Under **Server Settings**, select the name of your server, then:
   - **Windows Mobile 5 or 6** — select **Properties**.
   - **Microsoft Smartphone** — choose **Menu»Edit**.

   The Server Properties dialog appears.
4. Select **Next** to go to the second part of the Server Properties dialog, then select **Next** again to go to the third part.
5. Select the **Refresh all content at next sync** checkbox.
6. Select **Finish**.

Updating your password

After changing your password on M-Business Server, you must update M-Business Connect with the new password. See "Changing your password" on page 47.

> **Note**
> If M-Business Server is integrated with a Windows domain, your password must be the same as your Windows domain password.

♦ To update your password

1. Start M-Business Client.
2. Choose **Menu»Options»Server Options**.

   The M-Business Connect screen appears.
3. Under **Server Settings**, select the name of your server, then:

   - **Windows Mobile 5 or 6** — select **Properties**.
   - **Microsoft Smartphone** — choose **Menu»Edit**.

   The Server Properties dialog appears.
4. Select **Next** to go to the second part of the Server Properties dialog.
5. Select **Set Password**.
6. Enter your new password, then select **OK**.
7. Select **Next** to go to the last part of the Server Properties dialog.
8. Select **Finish**.

   Your new password will be active the next time you synchronize.

Adding a proxy server connection manually

Add a proxy server connection manually either when Autodetect is unsuccessful or when some of the servers that you access with M-Business Connect should use proxy settings, while others should not. See “Configuring proxy server settings” on page 49. If you do not know what settings to enter, contact your system administrator.

Adding HTTP proxy settings

♦ To add HTTP proxy settings

1. In M-Business Client, choose **Menu»Options»Server Options**.

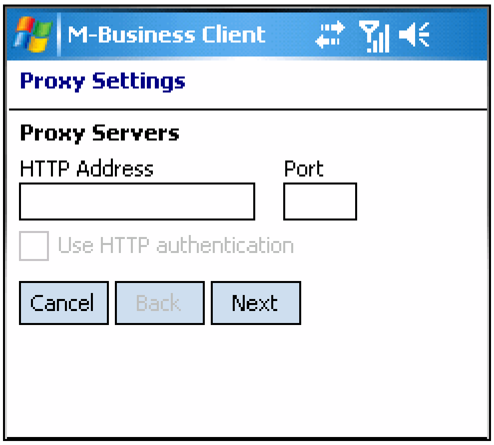
   The M-Business Connect screen appears.

2. Display the Proxy Settings dialog.

   - **Windows Mobile 5 or 6** — select the **Connection** tab.
   - **Microsoft Smartphone** — choose **Menu»Connection**.

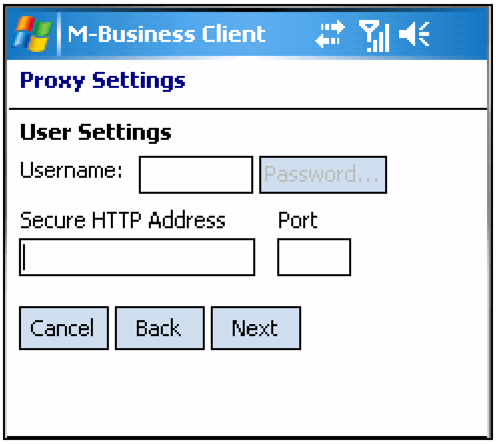
3. Select **Change**.

   The first part of the Proxy Settings dialog appears.



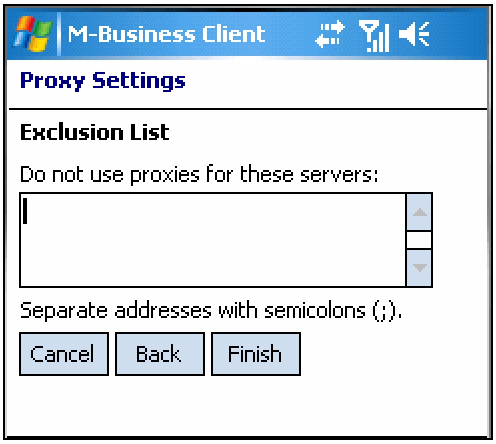
4. Enter your information in the **HTTP Address** and **Port** fields.
5. To enable user name and password protection, select the **Use HTTP authentication** checkbox.
6. Select **Next**.

   The second part of the Proxy Settings dialog is displayed.



7. In the **Username** box, enter your user name.
8. Select **Password**, enter your password, then select **OK**.
9. Enter a **Secure HTTP Address** and **Port** number, then select **Next**.

   The third part of the Proxy Settings dialog is displayed.



10. Enter exceptions to the HTTP settings in the **Exclusion List**.

    Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the host names of servers that M-Business Connect should access without going through the proxy server.

11. Select **Finish** to close the Proxy Settings dialog.

Adding secure proxy settings

♦ To add secure proxy settings

1. In M-Business Client, choose **Menu»Options»Server Options**.

   The M-Business Connect dialog appears.

2. Display the Proxy Settings dialog.

   ♦ **Windows Mobile 5 or 6** — select the **Connection** tab.

   ♦ **Microsoft Smartphone** — choose **Menu»Connection**.

3. Select **Change**.

   The first part of the Proxy Settings dialog appears.

4. Select **Next** to display the second part of the Proxy Settings dialog.

   Enter your information in the **Secure HTTP Address** and **Port** fields, then select **Next**.

5. Enter exceptions to the settings in the **Exclusion List**.

   Separate multiple addresses with semicolons.

> **Note**
> Exceptions are the host names of servers that M-Business Connect should access without going through the proxy server.

6. Select **Next** to display the third part of the Proxy Settings dialog.

7. Select **Finish**.

Enabling a secure connection to a server

♦ To enable a secure connection to a server

1. In M-Business Client, choose **Menu»Options»Server Options**.

   The M-Business Connect dialog appears.

2. Under **Server Settings**, select the name of your server, then:

   - **Windows Mobile 5 or 6** — select **Properties**.
   - **Microsoft Smartphone** — choose **Menu»Edit**.

   The Server Properties dialog appears.

3. Select **Next** to go to the second part of the Server Properties dialog.

4. Select **Next** to display the second part of the Server Properties dialog, then select **Next** again to display the last part.

5. Select the **Connect Securely** checkbox.

> **Note**
> This checkbox is enabled only after the server in the **Hostname** field, in the first part of the Server Properties dialog, confirms that it can provide a secure connection to the device. The server confirms this during the first synchronization, or when you test the connection in the M-Business Connect dialog on your desktop. See "Configuring a new server connection" on page 207.

6. Select **Finish**.

Disabling and removing server connections

To understand why you would disable or remove a server connection, see “Disabling and removing server connections” on page 54.

Disabling and re-enabling a server connection

♦ To disable and re-enable a server connection

1. In M-Business Client, choose **Menu»Options»Server Options**.

   The M-Business Connect dialog appears.

2. In the **Server Settings** list, select the server that you want to disable, then:

   ♦ **Windows Mobile 5 or 6** — select **Properties**.

   ♦ **Microsoft Smartphone** — choose **Menu»Edit**.

   The Server Properties dialog appears.

3. Select **Next** to display the second part of the Server Properties dialog, then select **Next** again to display the last part.

4. Clear the **Connect to this server** checkbox.

   To re-enable the server connection, select the **Connect to this server** checkbox.

5. Select **Finish**.

Disabling the M-Business Connect conduit

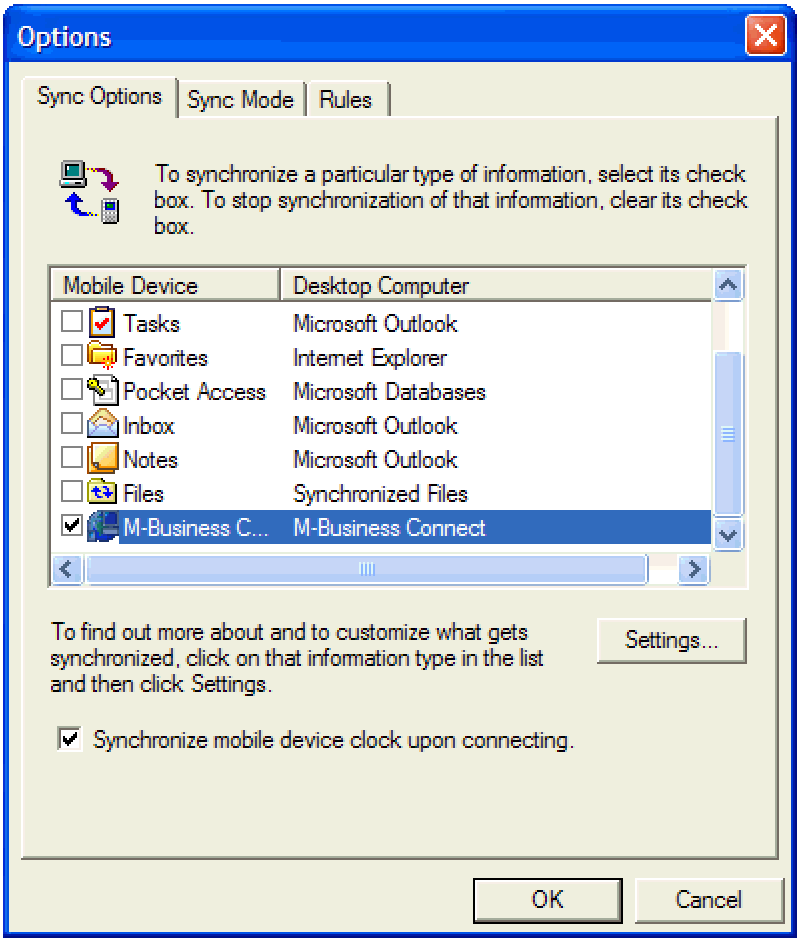
♦ To disable the M-Business Connect conduit

1. On your desktop computer, choose **Start»Programs»Microsoft ActiveSync**.

2. Choose **Tools»Options**.

   The Options dialog appears.

3. Click the **Sync Options** tab.



4. Clear the **M-Business Connect** checkbox.
5. Click **OK**.

Removing a server connection

♦ To remove a server connection

1. In M-Business Client, choose **Menu»Options»Server Options**.

   The M-Business Connect dialog appears.

2. Remove a server connection.

   - **Windows Mobile 5 or 6**:
     - In the **Server Settings** list, clear the checkbox for the server that you want to remove.

> **Note**
> Any server with a cleared checkbox will be removed. Any server with a selected checkbox will remain.

- Select **Remove**.
- Select **OK** when prompted to confirm.

- **Microsoft Smartphone**:
  - In the **Server Settings** list, select the server that you want to remove.
  - Choose **Menu»Remove**.
  - Select **OK** when prompted to confirm.

The next time you cradle synchronize, M-Business Connect will remove the server configuration from your desktop.

CHAPTER 13

Using M-Business Client on Windows Mobile 5 or 6, or Microsoft Smartphone

Contents

Note
M-Business Client on Windows Mobile 5 or 6 and Microsoft Smartphone devices is similar enough that essentially the same instructions work on either platform. Thus both platforms can be covered together in this chapter.
Since Microsoft Smartphone devices do not have a stylus to "tap" the screen, only the generic terms "choose" and "select" are used here.
In most cases, the screen shots provided are specifically from a Windows Mobile 5 device.

Understanding the basics

This section describes what you need to know to get started using M-Business Client.

Windows Mobile 5 or 6 devices with hardware keyboard

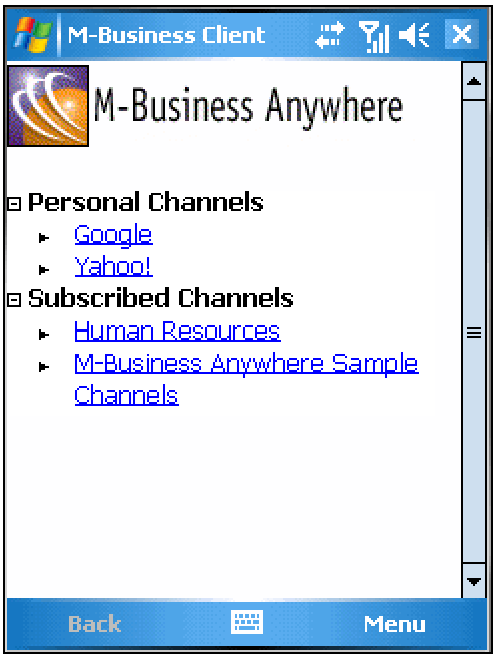
Some Windows Mobile 5 and 6 devices have a hardware keyboard that you can use to enter text, instead of using a stylus with the software input panel (SIP). On such devices, M-Business Client installs with the SIP disabled; only the hardware keyboard can be used to enter text. If you wish to use the SIP and stylus instead, you can switch to that input mode — see the documentation that came with your device for instructions on switching input modes.

Viewing channels

M-Business Client provides a browser that you can use to view channels.

M-Business Client Home Page

If you have added channels to your account on M-Business Server and performed a synchronization, the M-Business Client Home Page on your device will look something like this:



Note
If you do not see any channels, or if you do not see the channels that you expect, see Appendix "Troubleshooting" on page 285.

Collapsing and expanding channel lists

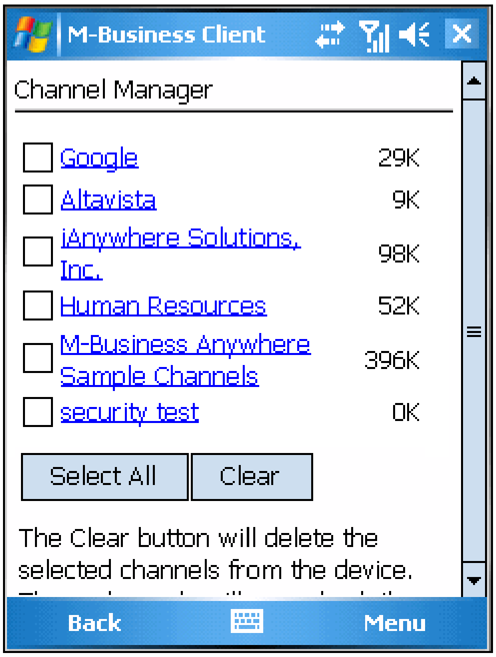
You can collapse or expand your channel lists by tapping the plus (to expand a list) or minus (to collapse a list) next to a channel category.

Temporarily clearing a channel's contents

♦ To temporarily clear a channel's contents

1. Start M-Business Client.
2. Choose **Menu»Tools»Channel Manager**.

   The Channel Manager is displayed.



3. Select the checkboxes beside the channels that you want to clear from the device, or select **Select All**.

Note
Any channel with a selected checkbox will be temporarily cleared. Any channel with a cleared checkbox will remain.

4. Select **Clear**.

   The selected channel's contents are removed from the device. You are still subscribed to these channels. The channel contents will be restored the next time you synchronize your data.

Navigating in M-Business Client

Navigating between pages on a Windows Mobile 5 or 6 or Microsoft Smartphone device

As navigation tools, M-Business Client on a Windows Mobile 5 or 6 or Microsoft Smartphone device provides a **Navigate** menu, plus a **Servers** button. On Microsoft Smartphone it also provides a Home button. URLs are underlined.

Navigation options are detailed in the table below.

To navigate to...	Use this option...
back one page when browsing	Choose **Menu»Navigate»Back**
forward one page when browsing	Choose **Menu»Navigate»Forward**
reloaded version of current page	Choose **Menu»Navigate»Reload Page**
a new page	Choose **Menu»Navigate»Open Page**, then select a page from **History** or **Bookmarks**, or enter the **URL to Open**

To go directly to the M-Business Client home page:

- **Windows Mobile 5 or 6** — choose **Menu»Home**.
- **Microsoft Smartphone** — select **Home** button in lower left corner.

When browsing, as a shortcut to backing up one page, you can use:

- **Windows Mobile 5 or 6** — the **Back** button in the lower left corner of the screen.
- **Microsoft Smartphone** — the hardware **Back** button in the upper right corner of the directional pad.

Navigating in a page on a Windows Mobile 5 or 6 or Microsoft Smartphone device

To navigate within an HTML page, you have the option of using scroll bars or tabbing with the directional pad. On Windows Mobile 5 or 6 devices you can also drag-scroll with a stylus.

Drag-scrolling on Windows Mobile 5 or 6

Drag-scrolling gives you finer control over navigation within an HTML page on Windows Mobile 5 or 6 devices. When drag-scrolling is enabled, you simply can tap and drag in an HTML page to scroll up or down, rather than using the scroll bars. When drag-scrolling is disabled, selection of text is disabled. For instructions on how to enable or disable drag-scrolling, see “Setting preferences” on page 223.

Tabbing with a directional pad

You also can navigate through HTML pages by tabbing with the directional pad. When you enable **D-pad right/left act like tab/backtab**, your device directional pad left and right actions function as forward and back tabs while M-Business Client is the active application. For instructions on how to enable or disable this function, see “Setting preferences” on page 223.

Setting preferences

Setting the full screen option

M-Business Client has a full screen option that allows you to hide the menu bar/navigation button area whenever you want to make the maximum screen space available for viewing content.

♦ **To hide and redisplay the menu bar/navigation button area**

1. Turn full screen on:

   - **Windows Mobile 5 or 6** — tap and hold anywhere within the content area of the M-Business Client screen, then choose **Full Screen** from the context menu.
   - **Microsoft Smartphone** — choose **Menu»Tools»Full Screen**.

2. Turn full screen off by repeating step 1.

   If Full screen had a check beside it when you opened the menu, the full screen option was on and selecting it now turns it off.

   If Full Screen did *not* have a check beside it when you opened the menu, the full screen option was off and selecting it now turns it on.

Using the Option Manager

Using the Option Manager, you can set preferences to control whether tables, frames, and images are displayed in HTML pages, and also to control how M-Business Client works.

The following table describes the features in the Option Manager on your device.

Table 1. Option Manager preferences for Windows Mobile 5 or 6

Field	Enables/disables	Additional details
BROWSER TAB		
D-pad navigates on page (Windows Mobile 5 or 6 only)	Using device directional pad to navigate pages in M-Business Client	Selected, device directional pad arrows move the focus on the current page; up, down, left, and right arrows scroll the current page up, down, left, and right if there is no object to which focus can move within the current page. Cleared, device directional pad up and down arrows scroll up and down a page, and left and right arrows scroll left and right a page.
Dragging pen (Windows Mobile 5 or 6 only)	What happens when you drag the stylus.	With **scrolls** selected, dragging scrolls the content window; with **selects**, dragging selects text in the content window. See "Working with text" on page 230.
Minimum font size	The minimum font size in which text is displayed.	Select **x-Small** (the default) to allow the page to display text down to the smallest size your device supports. Select a larger size to force page text to be no smaller than that. Select **x-Large** to force all text to be displayed in the largest size your device supports.
Maximum font size	The maximum font size in which text is displayed.	Select **x-Large** (the default) to allow the page to display text up to the largest size your device supports. Select a smaller size to force page text to be no larger than that. Select **x-Small** to force all text to be displayed in the smallest size your device supports.
CONTENT TAB		
Show Tables	Viewing tables	Showing tables may not be necessary for text-heavy synchronizing.
Show Images	Viewing images.	Showing images may not be necessary for text-heavy synchronizing.

Field	Enables/disables	Additional details
Enable JavaScript	The device to run JavaScript on pages that have not been marked with the HTML <HandheldFriendly> tag.	For more information on using JavaScript, see your System Administrator.
Show JavaScript Errors	The device to display an error message when a JavaScript error occurs	This is primarily a debugging tool used by channel developers.
ONLINE TAB		
Max. cache size	The maximum KB of pages stored in the memory cache on your device.	See "Managing online cache" on page 244.
Online Images	Image bit depth when browsing online.	See "Setting bit depth for online images" on page 243.
Go Online Automatically	The device to automatically go online when an offline user tries to open or link to a page which is not on the device	If not enabled, you will see a notifier that the page you linked to is not available on your device.

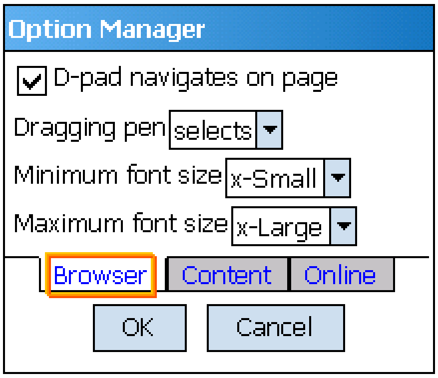
♦ To set preferences

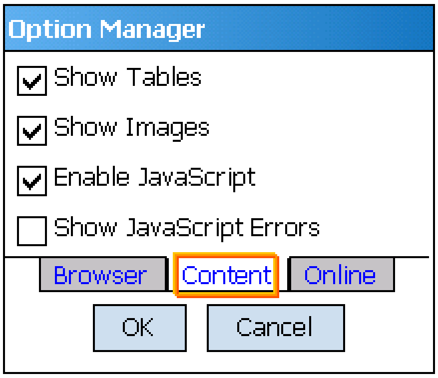
1. Start M-Business Client.
2. Choose **Menu»Options»Page Options**.

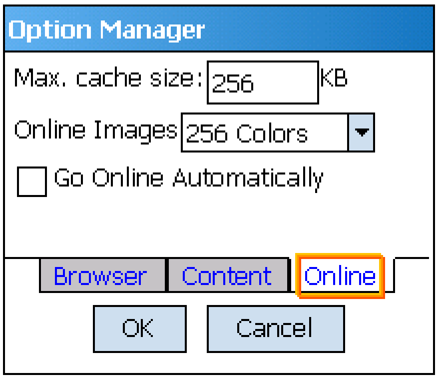
   The Option Manager dialog opens.
3. Select and clear the checkboxes beside your preferences.

   Select the tab at the bottom of the Option Manager dialog to bring another set of preferences forward.

> **Note**
> Microsoft Smartphone devices do not have the first two options below, **D-pad navigates on page** and **Dragging pen selects/scrolls**.







4. Save your changes:

- **Windows Mobile 5 or 6** — select **OK**.
- **Microsoft Smartphone** — select **Done**.

Selecting the server that delivers content

♦ To switch servers on your mobile device when M-Business Client is configured for multiple servers

1. Start M-Business Client.
2. Select the **Servers** button.
3. Select the server you want to switch to, then select **Go To Selected Server**.

   M-Business Client displays the home page for the server.

Searching to find content in M-Business Client

From within M-Business Client you can choose to search either the current channel page only, or all channel pages stored on your mobile device.

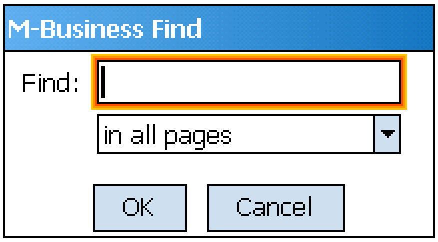
Searching the current page only

To search the current page only:

♦ **To search the current page only**

1. Start M-Business Client.
2. Choose **Menu»Navigate»Find**.

   The M-Business Find dialog is displayed.

3. Select **in page.**
4. Enter the words to search for in the text field, then:

   ♦ **Windows Mobile 5 or 6** — select **OK**.

   ♦ **Microsoft Smartphone** — select **Done**.

   The first instance of your searched text is highlighted in the current page.

5. Choose **Menu»Navigate»Find Next** to find the next instance of the searched text.

Searching all pages

♦ **To search all M-Business Client channel pages**

1. Start M-Business Client.
2. Choose **Menu»Navigate»Find**.

   The M-Business Find dialog is displayed. See "Searching the current page only" on page 228.

3. Select **in all pages.**

4. Enter the words to search for in the text field, then:

   - **Windows Mobile 5 or 6** — select **OK**.
   - **Microsoft Smartphone —** select **Done**.

   A search results page appears, showing found instances by page and search progress.

5. Select **Find More** to continue searching.

   When all pages have been searched, an << **end of search** >> message is displayed on the last search page.

6. Select a highlighted instance to go to the page and the line where the instance occurs.

7. Select the **Back** button to return to the results page.

Working with text

M-Business Client provides cut, copy, and paste functions for working with text in channels, web pages, and forms, and for moving text between M-Business Client and other device applications.

Using the copy and paste feature

You can copy selected text from online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as Pocket Word) on your device.

> **Note**
> You cannot use cut and paste functions at all on Microsoft Smartphone devices, and on Windows Mobile 5 or 6 devices you cannot use cut and paste functions in M-Business Client dialogs or HTML content.

♦ To use the copy and paste feature

1. In M-Business Client, open a channel or web page.
2. To copy specific text within the page, drag your stylus to select the text you want to copy.

   > **Note**
   > In order to select portions of text within a channel or web page using your stylus, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text selection, see "Setting preferences" on page 223.

3. To copy an entire page, choose **Menu»Tools»Select All**.
4. Choose **Menu»Tools»Copy**.

   The selected text is copied to the device clipboard; now it can be pasted into other pages or device applications.

5. Open the application or page that you want to paste the copied text into, tap where you want to paste, then choose **Menu»Tools»Paste**.

Using the cut and paste feature

You can cut selected text from form fields in online documents or web pages to the device clipboard, then paste that selected text onto another form or into another application (such as CE Word) on your device.

> **Note**
> You cannot use cut and paste functions at all on Microsoft Smartphone devices, and on Windows Mobile 5 or 6 devices you cannot use cut and paste functions in M-Business Client dialogs or HTML content.

♦ To use the cut and paste feature

1. On your device, open a channel or web page.
2. In a form field, drag your stylus to select the text you want to cut.

> **Note**
> In order to select portions of text within a channel or web page, **Dragging pen** must be set to **selects** in your preferences. For information on how to enable text-selection, see "Setting preferences" on page 223.

3. Choose **Menu»Tools»Cut**.

   The selected text is cut and copied to the device clipboard; now it can be pasted into other pages or device applications.

4. Open the application or page into which you want to paste the copied text, tap where you want to paste, then choose **Menu»Tools»Paste**.

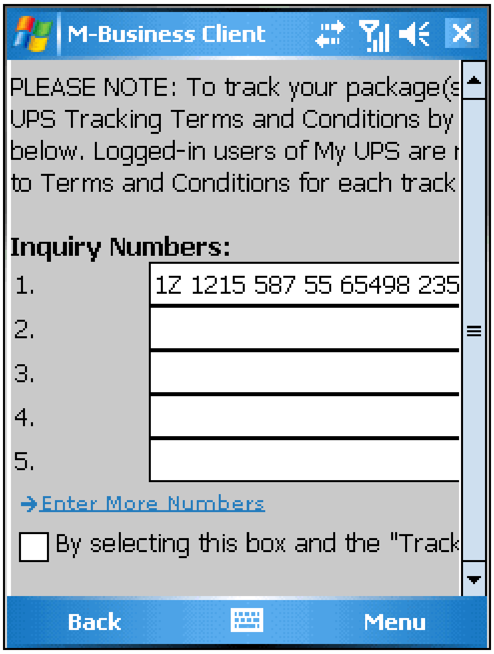
Using HTML forms

Submitting HTML forms while offline

When submitting a form, keep in mind the options in the Tools menu for working with text. These functions are especially useful for filling out forms. See "Working with text" on page 230for instructions.

♦ To submit HTML forms in M-Business Client while offline

1. Fill out the form.



2. Select the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message saying the form will be submitted on the next synchronization.

3. Select **OK**.

   The form has been added to the Forms Manager queue.

> **Note**
> You can use the Forms Manager to view the status of the submitted form. For instructions, see "Using the Forms Manager" on page 233.

4. Synchronize your mobile device to send the form to the website.

   See the documentation that came with your mobile device for instructions.

Displaying the response

M-Business Server may respond to a form submission in one of two ways:

- The server may alter the channel pages that you initially downloaded.

  For example, suppose you subscribe to a financial channel and, every time you synchronize, your channel updates a page that shows the current prices of a list of stocks you had selected earlier. You might submit a form to change the list of stocks you want to watch. In this case, the server responds by changing the page that displays the current prices to reflect your new list. To look at the server's response, select the channel.

- The server may send down a separate response page.

  Suppose you submit a form to the same channel, but this time you want to buy shares of a stock. There are no channel pages to alter. Instead, the server downloads a new response page to the Forms Manager confirming your order.

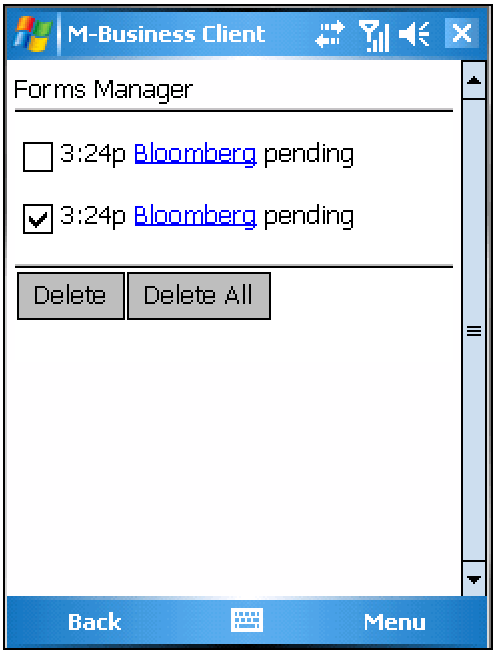
Using the Forms Manager

Accessing the Forms Manager

♦ **To access the Forms Manager**

1. Start M-Business Client.
2. Choose **Menu»Tools»Forms Manager**.

   M-Business Client displays a list of forms that you have submitted or are going to submit during the next synchronization. If a form was submitted successfully, the word **success** appears to the right of the form's name. Select **success** to view the response page sent by the channel.



Editing forms in the Forms Manager queue

♦ To edit a form

1. Start M-Business Client.
2. Choose **Menu»Tools»Forms Manager**.

   The Forms Manager appears.
3. In the third column, select the linked title of the form.

   The form appears.
4. Edit the form.
5. Select the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message indicating the forms will be submitted on the next synchronization.
6. Select **OK**.

Deleting forms in the Forms Manager queue

♦ To delete a form

1. Start M-Business Client.
2. Choose **Menu»Tools»Forms Manager**.

   The Forms Manager appears.
3. Select the checkbox to the left of the form(s) that you want to delete.
4. Select **Delete**.
5. Select **OK**.

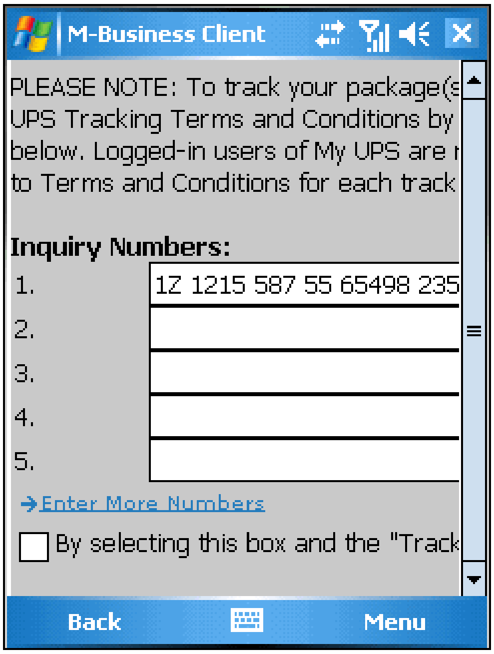
> **Tip**
> Select **Delete All** to delete all forms in the queue.

Submitting HTML forms while online

If you select the **Submit** button when you are online (connected to the Internet through a wired or wireless modem or Ethernet card), M-Business Client will use the modem settings you have provided to connect to M-Business Server, then immediately send the forms request to the website. This way, you get an immediate response.

♦ To submit HTML forms in M-Business Client while online

1. Fill out the form.



2. Select the **Submit** button.

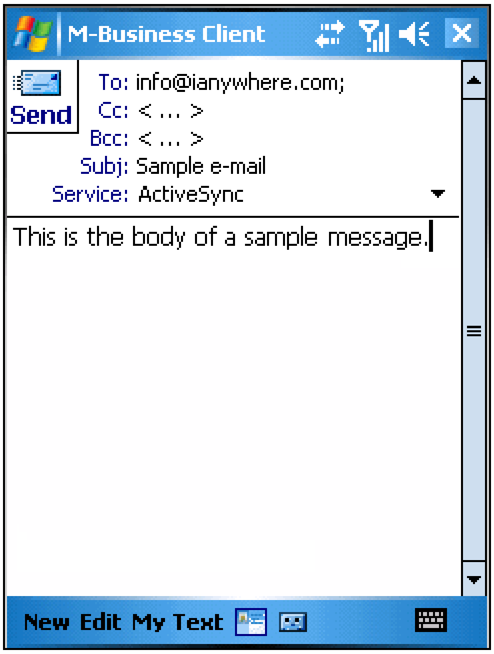
   This button might be labeled something else, like **OK** or **Update**.

   The form is sent to the website, the website responds, and the response is downloaded to your mobile device.

Email integration: Launching email from a web page

You can launch your Pocket Outlook or Inbox email application from a web page. To do this, select an email link in a web page on your device.

Your Inbox application launches, and a new message appears. The **To:** field is automatically populated with email address from the link you clicked. Depending on how the email link was configured, the **Subject:** field also may populate.



Phoneto integration: Launching a dialer application from a web page

Use the `phoneto` link to launch a configured dialer application, with the telephone number automatically filled in, from a device web page. An example of the HTML markup for a `phoneto` link is as follows.

```
<a href=phoneto:18005551212>Toll-free directory assistance</a>
```

On your device screen, a `phoneto` link looks just like any other link, but the link text should make it clear that this link makes a phone call.

♦ To launch a dialer application from a web page

1. Select the telephone number link on the device.
2. The dialing will initiate automatically.

Note
You will get an error message if the device does not contain an integrated telephone. The error message will display the telephone number that was selected, so the user could then manually dial this telephone number on another device.

Synchronizing remotely on Windows Mobile 5 or 6

> **Note**
> M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
> If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Using a modem to synchronize on Windows Mobile 5 or 6

Before you can use M-Business Client with a modem (or other wireless connection), you need to make sure that the modem or other device is configured properly and that you have network access to your Internet Service Provider (ISP). Refer to your modem manufacturer's documentation to configure your modem and network access.

To access M-Business Server, M-Business Client uses the settings in M-Business Connect. If you can connect to your ISP but you are unable to access M-Business Server, check the M-Business Connect settings. See "Setting server information" on page 207.

> **Note**
> To synchronize with a cradle from your desktop, use the Microsoft ActiveSync software installed on your desktop.

Modem synchronizing in M-Business Client on Windows Mobile 5 or 6

♦ **To synchronize with a modem in M-Business Client**

1. Start M-Business Client.
2. Choose **Menu»Sync All**.

   M-Business Client automatically accesses the modem and connects to M-Business Server.

Modem synchronizing in M-Business Connect on Windows Mobile 5 or 6

An alternate method of synchronizing involves using M-Business Connect.

♦ **To synchronize with a modem in M-Business Connect**

1. From M-Business Client, choose **Menu»Options»Server Options**.

M-Business Connect is displayed.

2. Select the **Servers** tab.
3. Select **Sync All**.

   M-Business Connect accesses the modem and connects to M-Business Server.

Using an Ethernet card to synchronize

Before you can use M-Business Client with an Ethernet card (or other network connection), you need to make sure that the Ethernet card is configured properly to allow you network access. Refer to your manufacturer's documentation for information on configuring your Ethernet card and network access.

To access M-Business Server, M-Business Client uses the settings in M-Business Connect. If you can connect to your ISP but you are unable to access M-Business Server, check the M-Business Connect settings. See "Setting server information" on page 207.

The exact steps for synchronizing to M-Business Server using an Ethernet card may vary depending on the type of Ethernet card you use.

♦ To synchronize with M-Business Server

1. Install M-Business Client software on your desktop computer, then synchronize to install the software on your mobile device.
2. Follow the installation manual for configuring the Ethernet card on your device.

> **Note**
> Most cards automatically will assign you an IP address.

3. Open M-Business Client, then choose **Menu»Options»Server Options** and select **Sync All**, or **Menu»Sync All**.
4. Once the card is properly installed, clicking on any link leading to a page not on the device will cause M-Business Client automatically to retrieve and deliver that page to you.

Browsing online

Windows Mobile 5 or 6 and Microsoft Smartphone devices have an **Open Page** feature that includes **History** and **Bookmark** select lists, plus an address box where you can enter a URL to open.

The progress bar fills from left to right as data is received by your mobile device. It also displays a count of bytes received. If a **Secure Connection** icon appears beside the progress bar, the data transfer is secure.

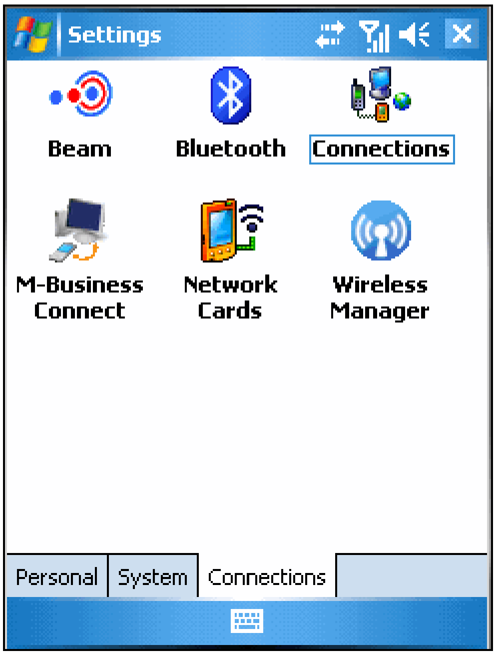
Browsing content

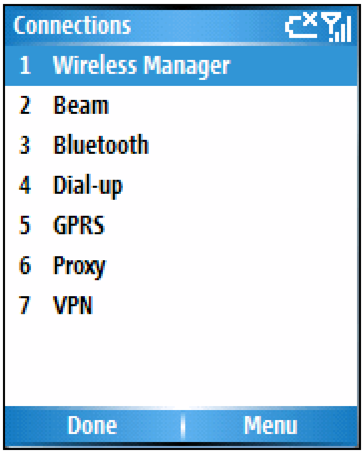
Browsing the Internet or your corporate intranet

♦ **To browse the Internet or your corporate intranet**

1. On the device Start menu, choose **Start»Settings**, then select the **Connections** tab.
2. Select the **Connections** icon.

   The Connections page opens.
3. Select a connection option from the list.
4. If necessary, set up the connection to use your modem, wireless card, or other device.

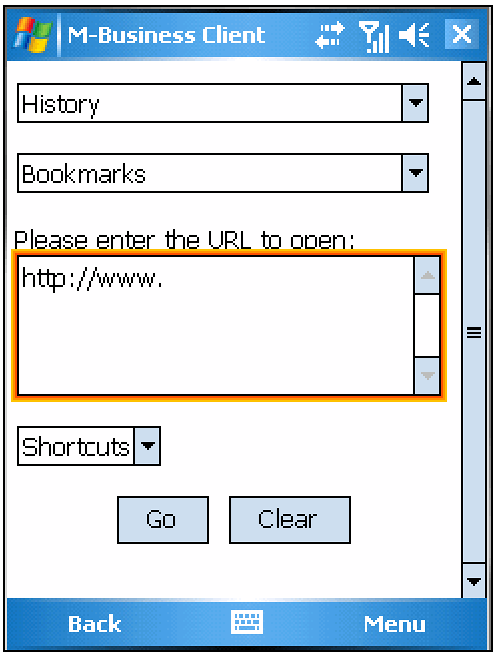




Browsing to a specific URL

♦ To browse to a specific URL

1. In M-Business Client, choose **Menu»Navigate»Open Page**.
2. In the text field, enter the URL of the page that you want to open, or select a URL from the **History** or **Bookmark** drop-down list.



3. Display the page:

- **Windows Mobile 5 or 6** — select **Go**.
- **Microsoft Smartphone** — select **Done**.

The requested page appears.

Reloading a page

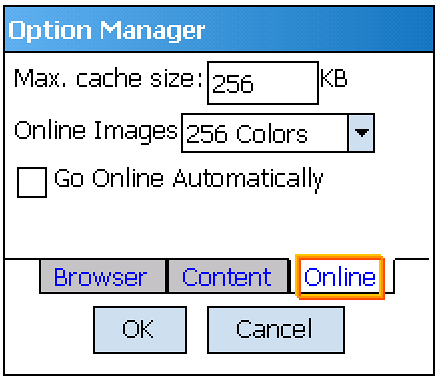
Invoke the Reload Page command by choosing **Menu»Navigate»Reload Page**. When you are connected to the Internet, you can use the Reload Page command to update the contents of a page. When you are offline, you can use the command to clear form data.

Setting bit depth for online images

M-Business Client downloads online images at a default bit depth of four grays. Depending on which mobile device you use, the image quality you want, and the speed of your online connection, you may choose to download images at another bit depth, or not to download images at all.

♦ To change the bit depth on your device

1. Choose **Menu»Options»Page Options**.
2. Select the **Online** tab to bring it forward.



3. Select the drop-down list for **Online Images** to see a list of bit depths.

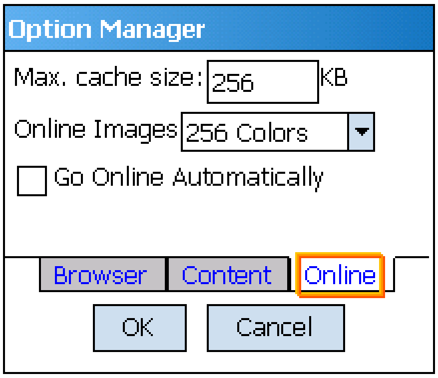
   The bit depth options listed will depend on your mobile device.
4. Select the bit depth you desire.
5. Save your changes:
   - **Windows Mobile 5 or 6** — select **OK**.
   - **Microsoft Smartphone** — select **Done**.

Managing online cache

Defining maximum memory for caching

♦ To define the amount of memory used for caching on your device

1. Choose **Menu»Options»Page Options**.
2. Select the **Online** tab.



3. Specify the **Max. cache size** on your mobile device.

> **Note**
> The default cache size is 256 KB.

4. Save your changes:

   - **Windows Mobile 5 or 6** — select **OK**.
   - **Microsoft Smartphone** — select **Done**.

Deleting a page from the online cache

If you are browsing online, M-Business Client caches the pages it already has displayed. See “Managing online cache” on page 78. You can remove individual pages from the cache to free up space.

♦ To delete a page from the online cache on your device

1. In M-Business Client, choose **Menu»Tools»Online Cache Manager.**

   M-Business Client displays a list containing the pages in the cache.

2. Select the checkboxes beside the pages you want to delete from the cache, or select **Select All**.

3. Select **Delete**.
4. Select **OK**.

   The selected pages are removed from the cache.

Note
Although the cache shows 0K used, the contents of the cache are not entirely cleared until you connect your device to the server, either by cradle synchronizing with your desktop or by modem synchronizing.

Part VIII. M-Business Client on Symbian OS

CHAPTER 14

Configuring a server connection on Symbian OS

Contents

Opening M-Business Client on your mobile device

Opening M-Business Client

To access M-Business Client on your Symbian OS device, choose **Applications»My Own»M-Business**.

Opening the Server Options dialog in place of M-Business Connect

M-Business Connect is not used on Symbian OS devices, but the same functionality for managing your server connections is provided in the Server Options dialog. To open the Server Options dialog in M-Business Client on your Symbian OS device, choose **Options»Settings»Server options**.

Setting server information

Configuring a new server connection

♦ To configure a new server connection

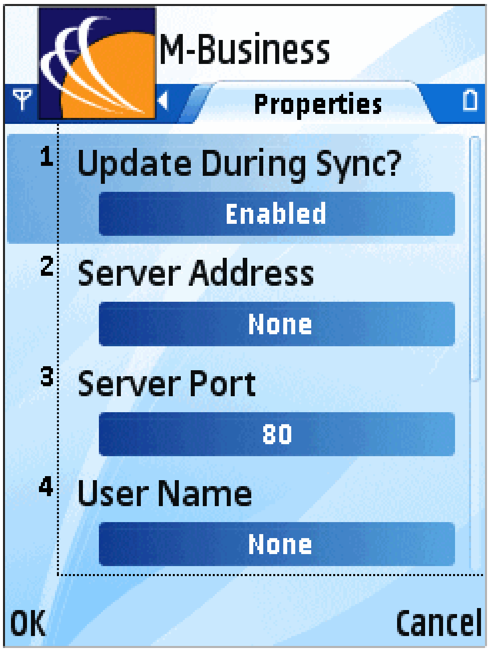
1. From M-Business Client, choose **Options»Settings»Server options**.

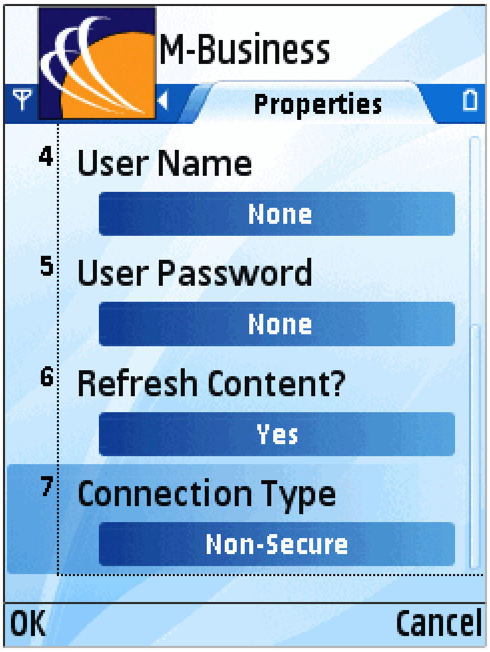
   The Server Options dialog opens.

2. Start adding your server connection:

   Choose **Options»Add**.

   The Properties dialog is displayed.





3. Set **1 Update During Sync** to **Enabled**.

   If this setting is not enabled, M-Business Client will not contact this server when you synchronize.

4. For **2 Server Address**, enter the host name, or URL, for the M-Business Server to which you want to synchronize.

5. In **3 Server Port**, enter the port number for the M-Business Server.

6. In **4 User Name**, enter the user name for your account on the M-Business Server.

7. In **5 User Password**, enter the password for your account on the M-Business Server.

8. For **6 Refresh Content**, select **Yes** to refresh all content on every synchronization, or **No** to download only updated or new content.

9. If you want to connect to this server securely you cannot set that up yet.

   You cannot set **7 Connection Type** to **Secure** until you synchronize once with the server so that it can confirm that it supports secure connections. Finish configuring this server connection now, then after you synchronize with the server, see "Editing a server connection" on page 253.

10. If your device has a secure digital (SD) card, select the **Use Card** checkbox if you want content from this server to be stored on the card instead of in your device's main memory.

> **Note**
> If you installed M-Business Client on your SD card, the Use Card checkbox will be unavailable. All content from all servers will automatically be stored on the SD card. For more information, see "Installing M-Business Client to use a secure digital (SD) card on your Microsoft OS device" on page 16.

11. Select **OK**, then **Yes** when prompted to save changes.

    The next time you synchronize, you will be able to view content from the new server.

Editing a server connection

♦ To edit a server connection

1. Start M-Business Client.
2. Choose **Options»Settings»Server options**.

   The Server Options dialog appears.
3. Select the name of your server, then choose **Options»Edit**.

   The current server options are displayed.
4. Make any changes that you need to in the current settings.
5. Select **OK**, then **Yes** when prompted to save changes.

Refreshing all content from a server

♦ To refresh all content from a server

1. Start M-Business Client.
2. Choose **Options»Settings»Server options**.

   The Server Options dialog appears.
3. Select the name of your server, then choose **Options»Edit**.

   The current server options are displayed.
4. For **6 Refresh Content**, select **Yes**.
5. Select **OK**, then **Yes** when prompted to save changes.

   The new setting will be active the next time you synchronize.

Updating your password

After changing your password on M-Business Server, you must update the Server Options dialog with the new password. See "Changing your password" on page 47.

> **Note**
> If M-Business Server is integrated with a Windows domain, your password must be the same as your Windows domain password.

♦ To update your password

1. Start M-Business Client.
2. Choose **Options»Settings»Server options**.

   The Server Options dialog appears.
3. Select the name of your server, then choose **Options»Edit**.

   The current server options are displayed.
4. In **5 User Password**, enter the new password for your account on the M-Business Server.
5. Select **OK**, then **Yes** when prompted to save changes.

   Your new password will be active the next time you synchronize.

Adding a proxy server connection manually

Add a proxy server connection manually either when Autodetect is unsuccessful or when some of the servers that you access should use proxy settings, while others should not. See "Configuring proxy server settings" on page 49. If you do not know what settings to enter, contact your system administrator.

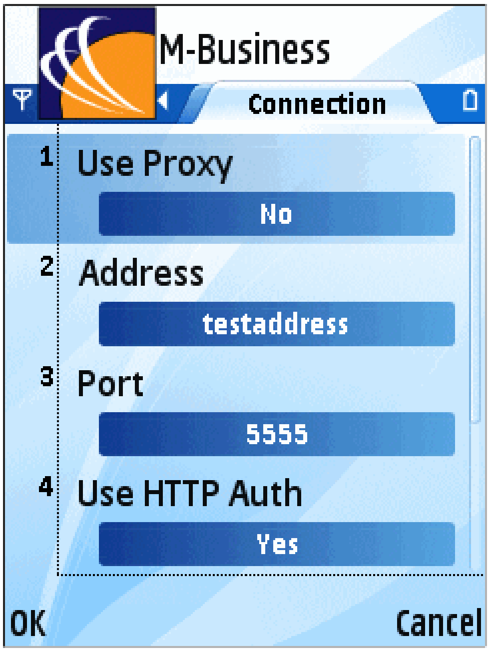
♦ To add HTTP a proxy server connection manually

1. In M-Business Client, choose **Options»Settings»Server options**.

   The Server Options dialog appears.

2. Press the **Right Arrow** on the navigation button to select the **Connections** tab.

   The first part of the Connection tab appears.

   Press the **Down Arrow** on the navigation button to display the rest of the items on the Connection tab.

3. Set **1 Use Proxy** to **Yes**.
4. Enter your information in the **2 Address** and **3 Port** fields.
5. To enable user name and password protection, set **4 Use HTTP Auth** to **Yes**.
6. In the **5 User** box, enter your user name.
7. In the **6 Password** box, enter your password.
8. Select **OK** to close the Connection tab.

Enabling a secure connection to a server

♦ To enable a secure connection to a server

1. Start M-Business Client.
2. Choose **Options»Settings»Server options**.

   The Server Options dialog appears.
3. Select the name of your server, then choose **Options»Edit**.

   The current server options are displayed.
4. Set **7 Connection Type** to **Secure**.

> **Note**
> The Secure option is enabled only after the server specified in **2 Server Address** confirms that it can provide a secure connection to the device. The server confirms this during the first synchronization. See “Configuring a new server connection” on page 251.

5. Select **OK**, then **Yes** when prompted to save changes.

Disabling and removing server connections

To understand why you would disable or remove a server connection, see "Disabling and removing server connections" on page 54.

Disabling and re-enabling a server connection

♦ To disable or re-enable a server connection

1. In M-Business Client, choose **Options»Settings»Server options**.

   The Server Options dialog appears.

2. Select the server that you want to disable, then choose **Options»Edit**.

   The current server options are displayed.

3. Set **1 Update During Sync** to **Disabled**.

   To re-enable the server connection, set this to **Enabled**.

4. Select **OK**, then **Yes** when prompted to save changes.

Working offline in place of disabling the M-Business Connect conduit

The M-Business Connect conduit is not used on Symbian OS devices. All synchronizations on are performed wirelessly. The Symbian OS option that is most comparable to disabling the M-Business Connect conduit is working offline.

♦ To work offline

1. In M-Business Client, choose **Options»Work Offline**.
2. To work online again, choose **Options»Work Online**.

Removing a server connection

♦ To remove a server connection

1. In M-Business Client, choose **Options»Settings»Server options**.

   The Server Options dialog appears.

2. In the **Servers** list, select the server that you want to remove.
3. Choose **Options»Remove**.
4. Select **Yes** when prompted to delete this entry.

CHAPTER 15

Using M-Business Client on Symbian OS

Contents

Understanding the basics

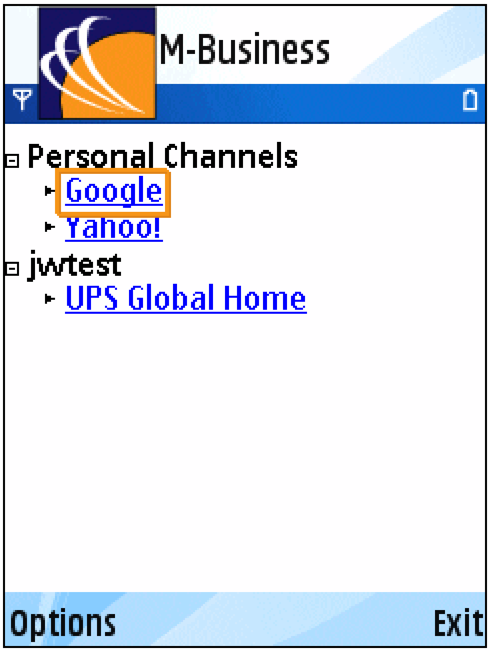
This section describes what you need to know to get started using M-Business Client.

Viewing channels

M-Business Client provides a browser that you can use to view channels.

M-Business Client Home Page

If you have added channels to your account on M-Business Server and performed a synchronization, the M-Business Client Home Page on your device will look something like this:



Note
If you do not see any channels, or if you do not see the channels that you expect, see Appendix "Troubleshooting" on page 285.

Collapsing and expanding channel lists

You can collapse or expand your channel lists by selecting the plus (to expand a list) or minus (to collapse a list) next to a channel category.

Temporarily clearing a channel's contents

♦ To temporarily clear a channel's contents

1. Start M-Business Client.
2. Choose **Options»Settings»Manage»Channel Manager**.

   The Channel Manager is displayed.

3. Select the checkboxes beside the channels that you want to clear from the device, or select **Select All**.

> **Note**
> Any channel with a selected checkbox will be temporarily cleared. Any channel with a cleared checkbox will remain.

4. Select **Clear**.

   The selected channel's contents are removed from the device. You are still subscribed to these channels. The channel contents will be restored the next time you synchronize your data.

Navigating in M-Business Client

Navigating between pages on a Symbian OS device

As navigation tools, M-Business Client on a Symbian OS device provides a **Navigate** menu, plus the **Server Options** dialog to switch between content from different servers. URLs are underlined.

Navigation options are detailed in the table below.

To navigate to...	Use this option...
back one page when browsing	Choose **Options»Navigate»Back**
forward one page when browsing	Choose **Options»Navigate»Forward**
reloaded version of current page	Choose **Options»Navigate»Reload Page**
a new page	Choose **Options»Navigate»Open Page**, then select a page from **History** or **Bookmarks**, or enter the **URL to Open**

To go directly to the M-Business Client home page, choose **Options»Home**.

When browsing, as a shortcut to backing up one page, you can use the **Back** button in the lower right corner of the screen.

Navigating in a page on a Symbian OS device

You can navigate through HTML pages by tabbing with the navigation button. Your device navigation button Left and Right Arrows function as forward and back tabs while M-Business Client is the active application.

Setting preferences

Setting the full screen option

M-Business Client has a full screen option that allows you to hide the M-Business Client header and footer areas whenever you want to make the maximum screen space available for viewing content.

♦ To hide and redisplay the M-Business Client header and footer areas

1. Turn full screen on, choose **Options»Settings»Full Screen**.
2. Turn full screen off by repeating step 1.

Setting the billable warning option

By default, M-Business Client warns you whenever you start an operation that may result in charges from your phone service provider. You can disable this warning if you do not need it, and you can re-enable it if you change your mind.

♦ To disable the billable warning option

1. Choose **Options»Settings»Billable Warning**.
2. Re-enable the billable warning option by repeating step 1.

Using the Preferences dialog

Using the Preferences dialog, you can set preferences to control whether tables, frames, and images are displayed in HTML pages, and also to control how M-Business Client works.

The following table describes the features in the Preferences dialog on your device.

Table 1. Preferences for Symbian OS

Field	Enables/disables	Additional details
BROWSER TAB		
Minimum font size	The minimum font size in which text is displayed.	Select **x-Small** (the default) to allow the page to display text down to the smallest size your device supports. Select a larger size to force page text to be no smaller than that. Select **x-Large** to force all text to be displayed in the largest size your device supports.
Maximum font size	The maximum font size in which text is displayed.	Select **x-Large** (the default) to allow the page to display text up to the largest size your device supports. Select a smaller size to force page text to be no larger than that. Select **x-Small** to force all text to be displayed in the smallest size your device supports.
CONTENT TAB		
Show Tables	Viewing tables	Showing tables may not be necessary for text-heavy synchronizing.
Show Images	Viewing images.	Showing images may not be necessary for text-heavy synchronizing.

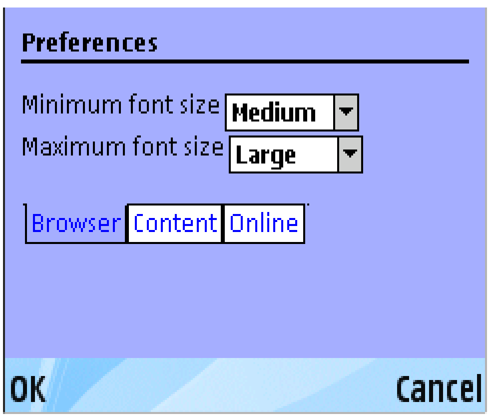
Field	Enables/disables	Additional details
Enable Java-Script	The device to run JavaScript on pages that have not been marked with the HTML <HandheldFriendly> tag.	For more information on using JavaScript, see your System Administrator.
Show Java-Script Errors	The device to display an error message when a JavaScript error occurs	This is primarily a debugging tool used by channel developers.
ONLINE TAB		
Max. cache size	The maximum KB of pages stored in the memory cache on your device.	See "Managing online cache" on page 279.
Online Images	Image bit depth when browsing online.	See "Setting bit depth for online images" on page 278.
Refresh Expired Pages	When online, shoud expired pages be refreshed automatically?	
Go Online Automatically	The device to automatically go online when an offline user tries to open or link to a page which is not on the device.	If not enabled, you will see a notifier that the page you linked to is not available on your device.

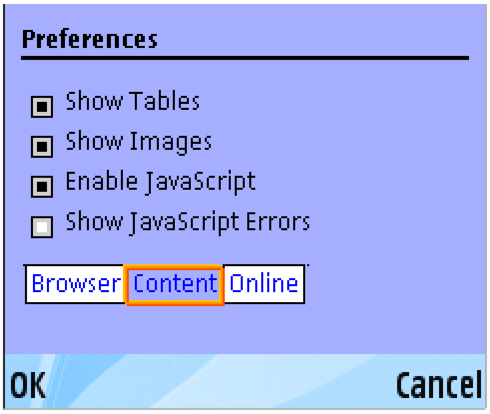
♦ To set preferences

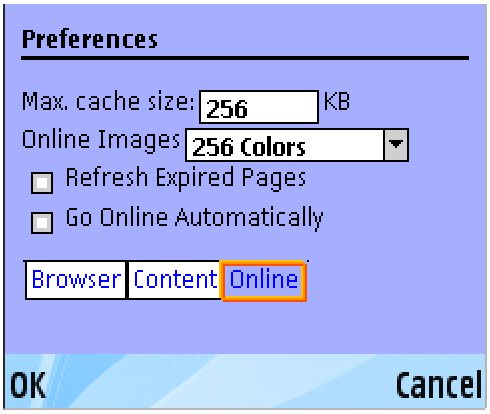
1. Start M-Business Client.
2. Choose **Options»Settings»Page Options**.

   The Preferences dialog opens.

   Select the tab at the bottom of the Preferences dialog to bring another set of preferences forward.







3. Select and clear the checkboxes beside your preferences.

4. Select **OK** to save your changes:

Selecting the server that delivers content

♦ To switch servers on your mobile device when M-Business Client is configured for multiple servers

1. Start M-Business Client.

2. Choose **Options»Settings»Server Options**.

3. Select the server you want to switch to, then select **Done**.

   M-Business Client displays the home page for the selected server.

Searching to find content in M-Business Client

From within M-Business Client you can choose to search either the current channel page only, or all channel pages stored on your mobile device.

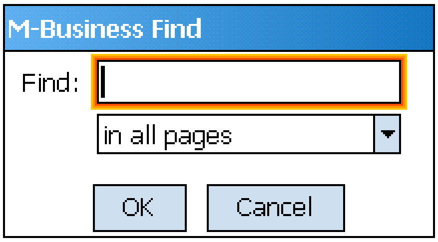
Searching the current page only

To search the current page only:

♦ To search the current page only

1. Start M-Business Client.
2. Choose **Options»Navigate»Find**.

   The M-Business Find dialog is displayed.



3. Select **in page.**
4. Enter the words to search for in the text field, then select **OK**.

   The first instance of your searched text is highlighted in the current page.

5. Choose **Options»Navigate»Find Next** to find the next instance of the searched text.

Searching all pages

♦ To search all M-Business Client channel pages

1. Start M-Business Client.
2. Choose **Options»Navigate»Find**.

   The M-Business Find dialog is displayed. See “Searching the current page only” on page 266.

3. Select **in all pages.**
4. Enter the words to search for in the text field, then select **OK**.

   A search results page appears, showing found instances by page and search progress.

5. Select **Find More** to continue searching.

   When all pages have been searched, an << **end of search** >> message is displayed on the last search page.

6. Select a highlighted instance to go to the page and the line where the instance occurs.

7. Select the **Back** button to return to the results page.

Working with text

M-Business Client does not provide cut, copy, and paste functions for working with text on Symbian OS devices.

Using HTML forms

Submitting HTML forms while working offline

♦ To submit HTML forms in M-Business Client while working offline

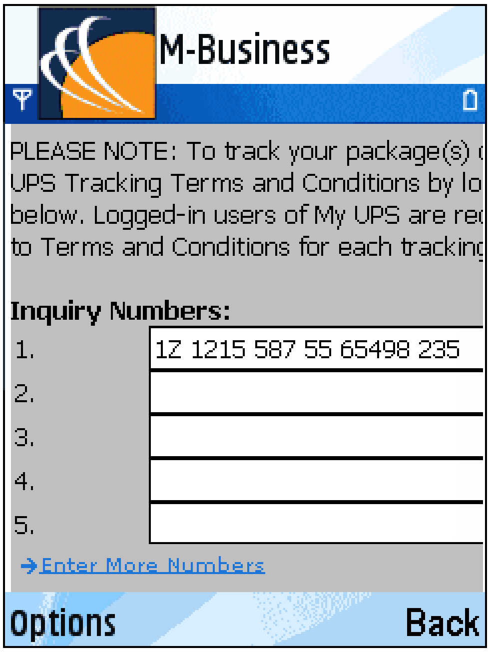
1. Be sure you are working offline.

   Choose **Options»Work Offline**

2. Be sure you have your **Go Online Automatically** preference is not enabled.

   For instructions on setting preferences, see "Using the Preferences dialog" on page 263.

3. Fill out the form.



4. Select the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message asking if you want to go online to submit the form.

5. Select **No**.

   The form is added to the Forms Manager queue.

> **Note**
> You can use the Forms Manager to view the status of the submitted form. For instructions, see "Using the Forms Manager" on page 270.

6. Synchronize your mobile device to send the form to the website.

   Choose **Options»Sync All** when you are ready to send your submitted forms to the host web server(s).

Displaying the response

M-Business Server may respond to a form submission in one of two ways:

- The server may alter the channel pages that you initially downloaded.

  For example, suppose you subscribe to a financial channel and, every time you synchronize, your channel updates a page that shows the current prices of a list of stocks you had selected earlier. You might submit a form to change the list of stocks you want to watch. In this case, the server responds by changing the page that displays the current prices to reflect your new list. To look at the server's response, select the channel.

- The server may send down a separate response page.

  Suppose you submit a form to the same channel, but this time you want to buy shares of a stock. There are no channel pages to alter. Instead, the server downloads a new response page to the Forms Manager confirming your order.

Using the Forms Manager

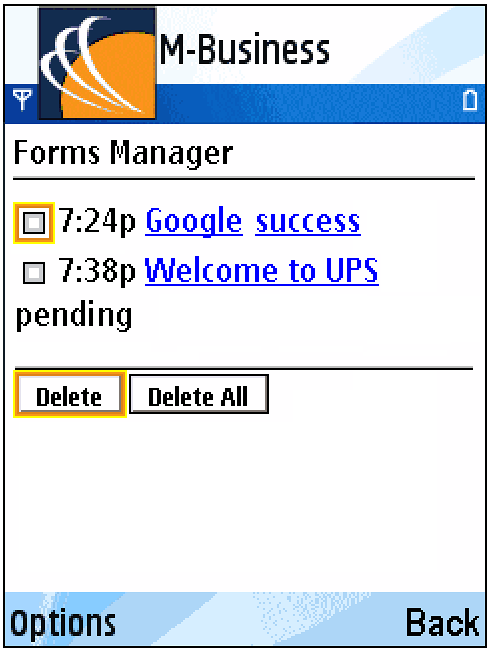
Accessing the Forms Manager

♦ To access the Forms Manager

1. Start M-Business Client.

2. Choose **Options»Settings»Manage»Forms Manager**.

   M-Business Client displays a list of forms that you have submitted or are going to submit during the next synchronization. If a form was submitted successfully, the word **success** appears to the right of the form's name. Select **success** to view the response page sent by the channel.



Editing forms in the Forms Manager queue

♦ To edit a form

1. Start M-Business Client.
2. Choose **Options»Settings»Manage»Forms Manager**.

   The Forms Manager appears.
3. In the third column, select the linked title of the form.

   The form appears.
4. Edit the form.
5. Select the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   M-Business Client displays a message indicating the forms will be submitted on the next synchronization.
6. Select **OK**.

Deleting forms in the Forms Manager queue

♦ To delete a form

1. Start M-Business Client.
2. Choose **Options»Settings»Manage»Forms Manager**.

   The Forms Manager appears.
3. Select the checkbox to the left of the form(s) that you want to delete.
4. Select **Delete**.
5. Select **OK**.

> **Tip**
> Select **Delete All** to delete all forms in the queue.

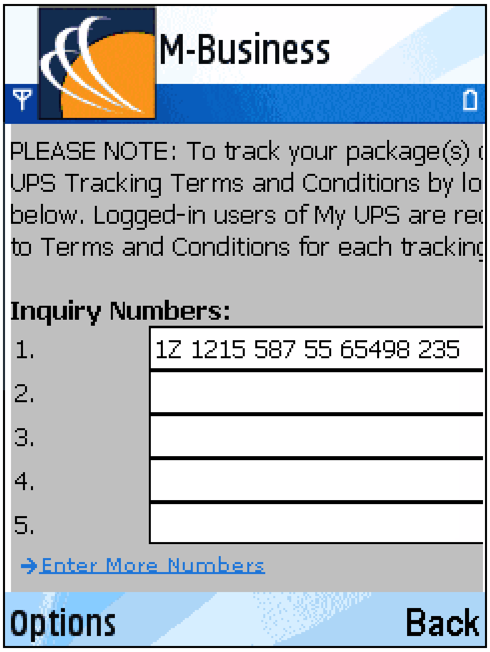
Submitting HTML forms while working online

If you select the **Submit** button while you are working online, M-Business Client immediately sends the forms request to the website and you get an immediate response.

♦ To submit HTML forms in M-Business Client while working online

1. Be sure you are working online.

   Choose **Options»Work Online**
2. Fill out the form.



3. Select the **Submit** button.

   This button might be labeled something else, like **OK** or **Update**.

   The form is sent to the website, the website responds, and the response is downloaded to your mobile device.

Email integration: not supported on Symbian OS

M-Business Client does not currently support email integration on Symbian OS devices. If you select a `mailto:` link in an HTML page, an error message is displayed.

Phoneto integration: Launching a dialer application from a web page

Use the `phoneto` link to launch the dialer application, with the telephone number automatically filled in, from a device web page. An example of the HTML markup for a `phoneto` link is as follows.

```
<a href=phoneto:18005551212>Toll-free directory assistance</a>
```

On your device screen, a `phoneto` link looks just like any other link, but the link text should make it clear that this link makes a phone call.

♦ To launch a dialer application from a web page

1. Select the telephone number link on the device.
2. The dialing will initiate automatically.

Synchronizing remotely on Symbian OS

All synchronizations on Symbian OS are performed remotely (wirelessly). To synchronize your Symbian OS device, choose **Options»Sync All**.

> **Note**
> M-Business Client has a recoverable synchronization feature. If your remote (wireless) synchronization is interrupted, because you lose your wireless connection, for example, M-Business Client automatically makes several attempts to complete the synchronization, picking up where it left off. This process is automatic; no error message is displayed and you do not need to do take any action.
> If you do see an error message indicating that your synchronization failed to complete, it means that M-Business Client was unable to recover your synchronization and you have to initiate a new synchronization, which must start over from the beginning.

Browsing online

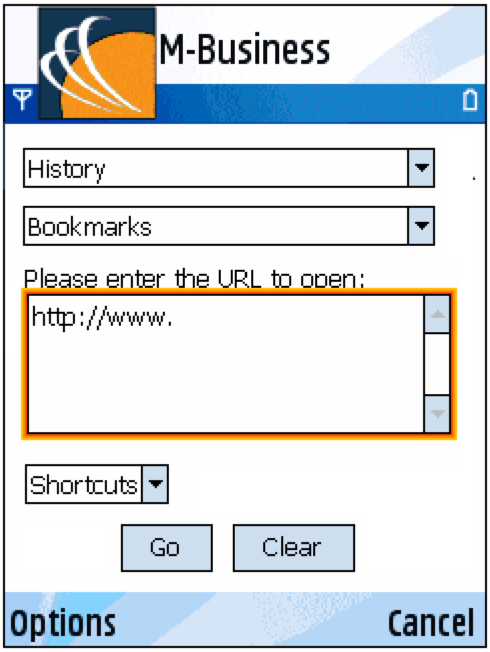
Symbian OS devices have an **Open Page** feature that includes **History** and **Bookmark** select lists, plus an address box where you can enter a URL to open.

The progress bar fills from left to right as data is received by your mobile device. It also displays a count of bytes received. If a **Secure Connection** icon appears beside the progress bar, the data transfer is secure.

Browsing to a specific URL

♦ **To browse to a specific URL**

1. In M-Business Client, choose **Options»Navigate»Open Page**.
2. In the text field, enter the URL of the page that you want to open, or select a URL from the **History** or **Bookmark** drop-down list.



3. To display the page, select **Go**.

   The requested page appears.

Reloading a page

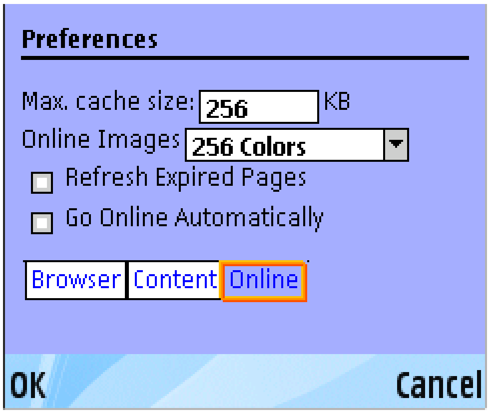
Invoke the Reload Page command by choosing **Options»Navigate»Reload Page**.

Setting bit depth for online images

M-Business Client downloads online images at a default bit depth of four grays. Depending on which mobile device you use, the image quality you want, and the speed of your online connection, you may choose to download images at another bit depth, or not to download images at all.

♦ To change the bit depth on your device

1. Choose **Options»Settings»Page Options**.
2. Select the **Online** tab to bring it forward.



3. Select the drop-down list for **Online Images** to see a list of bit depths.

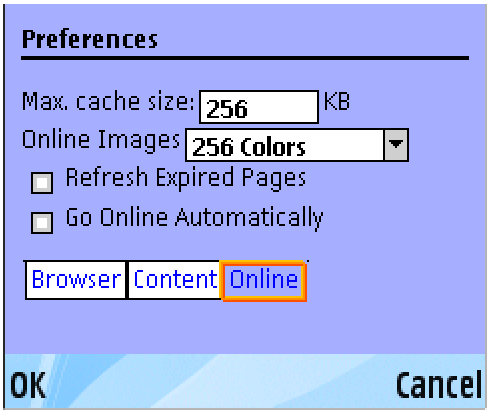
   The bit depth options listed will depend on your mobile device.
4. Select the bit depth you desire.
5. Select **OK** to save your changes.

Managing online cache

Defining maximum memory for caching

♦ To define the amount of memory used for caching on your device

1. Choose **Options»Settings»Page Options**.
2. Select the **Online** tab.



3. Specify the **Max. cache size** on your mobile device.

Note
The default cache size is 256 KB.

4. Select **OK** to save your changes.

Deleting a page from the online cache

If you are browsing online, M-Business Client caches the pages it already has displayed. See "Managing online cache" on page 78. You can remove individual pages from the cache to free up space.

♦ To delete a page from the online cache on your device

1. In M-Business Client, choose **Options»Settings»Manage»Online Cache Manager**.

   M-Business Client displays a list containing the pages in the cache.
2. Select the checkboxes beside the pages you want to delete from the cache, or select **Select All**.
3. Select **Delete**.

4. Select **OK**.

   The selected pages are removed from the cache.

> **Note**
> Although the cache shows 0K used, the contents of the cache are not entirely cleared until you synchronize.

Using on-device help

You can access context-sensitive on-device help in M-Business Client.

♦ To access on-device help in M-Business Client

1. Start M-Business Client.
2. Choose **Options»Help**.

   The Help page appears, displaying the topic most closely related to what you are doing.

> **Note**
> On-device help is not available when you are filling in fields in a dialog box. If on-device help is not available in the menu when you need to access it, back out of the screen you are in and choose **Options»Help** there.

3. If necessary, you can navigate around the help topics by selecting underlined links to different topics.
4. To close the Help page, select **OK**.

Part IX. Appendix

Appendix A

Troubleshooting

Contents

Device synchronization

Table 1. Problems with synchronizing

Platform	Possible cause/steps to take
Problem: You do not connect to M-Business Server when you synchronize your device.	
All	M-Business Connect is not configured properly. Verify that your settings are correct. If you are not sure your settings should be, contact your system administrator. To edit your server settings in M-Business Connect, see "Setting server information" on page 44.
Problem: Your M-Business Connect settings are correct, but you still do not connect to M-Business Server when you synchronize your device.	
Palm OS, Windows Mobile 5, or Microsoft Smartphone	You can view all of your sync events in the HotSync log. The HotSync log enables you to view all of your desktop-based sync events. On your mobile device, you can view the log of the most recent sync by tapping **Log** in the **HotSync** application. On your desktop, you can view a more complete sync history in HotSync Manager. Click the **HotSync Manager** icon in the Microsoft Windows System Tray, then select **View Log**. If HotSync Manager is not running, choose **Start»Programs»Palm Desktop»HotSync Manager**.

Platform	Possible cause/steps to take
Palm OS, Windows Mobile 5, or Microsoft Smartphone	The M-Business Connect conduit is disabled in Microsoft ActiveSync. To enable the M-Business Connect conduit in Microsoft ActiveSync: 1. Disconnect your device from your desktop computer, then reconnect it. 2. Open ActiveSync, then choose **Tools»Options**. The Options dialog displays. 3. Click the **Sync Options** tab, check the **M-Business Connect** checkbox, then click **OK**. 4. In the Options dialog, click **OK**.
Problem: Synchronizing with the M-Business Server does not update your channel content.	
All	Either an error occurred during a synchronization, or a website could not be accessed. If you are successfully connecting to M-Business Server when you synchronize, you can view your synchronization history in your Sync Log. To view your Sync Log: 1. Access your M-Business Server personal page. 2. Click the **View Sync Log** link in the Navigation Panel. By default, the sync log shows a history covering your last three syncs. To view your entire sync history, click **View Complete Sync History**.
Problem: Your device turns off immediately after you sync.	

Platform	Possible cause/steps to take
Palm OS	Your **Auto-off after** preference is set too low for the pages you are downloading. If you plan to download a large page to your device, set the **Auto-off after** preference on your device to two minutes or higher. To do this, tap the **Menu** silk-screen icon, then tap the **Prefs** icon. In the **Auto-off after** field, select **2 minutes** or a higher setting.

Channel content on device

Table 2. Channel content not appearing on device

Platform	Possible cause/steps to take
Problem: You do not see the channels you expected after installing M-Business Client on your device	
All	You have just installed M-Business Client on your mobile device. After syncing to install M-Business Client, you need to sync a second time to load your channels onto your device. If you have not performed the second sync, the device should display a page informing you that you need to sync again.
Problem: You have synced your device, but still do not see the expected channels	
All	You tapped **Cancel** or were disconnected from the network in the middle of your sync. In this case, you may see a welcome page instead of a list of channels. To see your subscribed channels, perform another sync.
All	You have not subscribed to any channels. To check, access your M-Business Server personal page — your Channel List for User... page appears automatically, displaying a list of channels to which you are subscribed. If there are none listed, contact your system administrator.
Problem: Your sync was successful and you have subscribed to channels, but you still do not see the expected channels	
All	You must access M-Business Server through a proxy server or a firewall. If this is the case, M-Business Connect attempts to configure the connection through the proxy server during the installation process, but it sometimes fails to do so. If M-Business Connect has failed, you must configure the connection manually. See “Configuring proxy server settings” on page 49.

Platform	Possible cause/steps to take
All	You do not have M-Business Connect installed on your desktop. On your desktop computer, look in **Start»Programs»M-Business Client** for the M-Business Connect application. If you do not have M-Business Connect installed, you will need to reinstall M-Business Client. See "Installing M-Business Client" on page 15.
All	You do not have M-Business Connect installed on your device. To check: ♦ On a Palm OS device, tap the **Applications** silkscreen icon and look for **M-Business Connect**. ♦ On a Windows Mobile Pocket PC device, choose **Start»Settings**, tap the **System** tab, then tap **Remove Programs** and look for **M-Business Connect**. ♦ On a Windows XP device, choose **Start»All Programs»M-Business Client** and look for **M-Business Connect.** ♦ On a Windows Mobile 5 or Microsoft Smartphone device, from within M-Business Client, choose **Menu»Options»Server Options** If you do not have M-Business Connect installed, you will need to reinstall M-Business Client. See "Installing M-Business Client" on page 15.

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