

InfoSafe™ Quick Start Documentation

Introduction:

InfoSafe™ allows easy information management of usernames, passwords, account numbers, private information, PINs, and ANY other information collection from any Palm OS handheld or phone and Windows PC. This document provides information on the handheld software, as the PC software has its own complete help file system. You may want to print this document for easier reference.

Installation:

To install the software, download the setup file (usually InfoSafePalm_Setup.exe) to your PC. Then, double click the .exe setup file to start the PC installer. The installer will install the PC software first. When the software is first run after installing, the handheld software will be installed.

Registration:

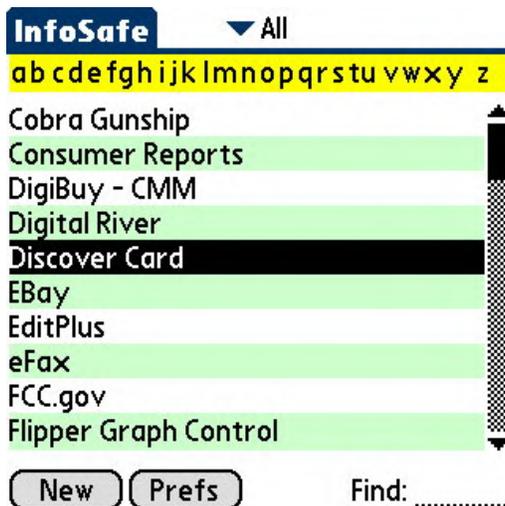
The software is initially installed as a trial version. After purchasing, a 5-digit registration code is provided. This 5-digit code is entered in the blank area on the startup screen on the handheld or on the PC software from the Help / Register menu. Once the registration code is entered on either the handheld or PC, the registration code will be transferred to the other version when synced. The registration code unlocks the full version features. No additional installation is required.

Getting Started:

The following screens and descriptions explain many of the features in InfoSafe™. The software was designed to be easy and intuitive, so it will be easy to get started. This documentation will help explain some of the advanced features.

To start the software on the handheld, tap the InfoSafe™ icon. On Palm OS handhelds, this icon may be in the Unfiled category. From the Home (icon) screen on your handheld, tap the drop down list in the upper right corner, then select Unfiled to list any uncategorized icons. A category can be assigned to the icon to make it easier to find. Consult your handheld manual for how to categorize icons.

Main List Screen:



Upon startup, the list of records is displayed. From this screen, the user may scroll through the list with the onscreen scrollbar or the hardware scroll buttons. Tap a letter in the Quick Nav Bar to go to the first record starting with that letter. Also, the Quick Find Area can be used to jump to a certain record by entering the first few letters in the record title. Simply tap any record in the list to view the record's details.

The buttons at the bottom of this screen will create a new blank record or display the preferences screen to set preferences and allow the password to be set or changed.

Record Viewer Screen:

View Record

Title: Discover Card
Category: Credit Card
Card #: 6011 1234 1234 1234
PIN #: 0123
Card Type: Credit
Cardholder: mypassword
Bank: support@discovercard.com
Expires: 01/2011
Phone: 800-347-2683
URL: http://www.discovercard.com
Notes: This is my primary card.

Back Edit

The viewer screen displays the detailed view of any record in one convenient text box.

The buttons at the bottom of the screen will go Back to the main record list or Edit the current record – which also allows it to be deleted.

Record Edit Screens:

Edit Record ▼ Credit Card

▼ Title: Discover Card ▶

▼ Card #: 6011 1234 1234 1234 ▶

▼ PIN #: 0123 ▶

▼ Card Type: Credit ▶

▼ Cardholder: mypassword ▶

▼ Bank: support@discovercard ▶

▼ Expires: 01/2011 ▶

▼ Phone: 800-347-2683 ▶

▼ URL: http://www.discoverc ▶

More Fields... ▶

Done Copy Delete Gen PW

The edit screens display the editing view of any record. Simply enter the text for each field. You can easily move to the next field while entering data using the Enter key or graffiti stroke (/).

The category for the record is displayed in the upper right corner of the screen, and this can be changed by tapping the down arrow next to the category name. When a new category is selected, the field names will be changed to the default field names for the selected category. The list of categories can be edited and customized.

Any field name on an individual record can be changed by tapping the down arrow to the left of any field name. The list of fields can be edited and customized. This allows individual records to be setup precisely for a particular item.

Edit Record

▼ Notes: This is my primary... ▶

▼ Notes: Multi-line text can go... ▶

▼ Notes: Multi-line text can go... ▶

The Expanded Input buttons to the right of each text field can be used to display multiple lines for easier viewing and editing of the corresponding text.

To move to the second screen of edit fields, tap the right arrow next to the More Fields... label.

Finally, the buttons at the bottom of the screen will save the record, duplicate the record, delete the record, or display the generate password screen.

Back Gen PW

Editing Categories:



The master list of categories can be editing to include the category names preferred by each user.

To edit the categories list, choose the Edit List... item in the drop down list of categories, or choose the Edit Categories List from the Edit menu.

The first screen displayed will list all categories. Icon buttons on this screen will add a new category, delete the selected category, or edit the selected category.



If adding a new category or editing a category, the Edit Category screen will be displayed. From this screen, the category name can be entered or edited. In addition, the preferred field names can be chosen for that category. This allows the user to setup the field names exactly as they would like them for the categories. However, the field names can be changed for individual records on the Details screen for a record. This allows for even greater flexibility.

Editing Field Names:



The master list of fields can be editing to include the field names preferred by each user.

To edit the field names list, choose the Edit List... item in the drop down list of field names, or choose the Edit Fields List from the Edit menu.

Icon buttons on this screen will delete the selected category, or edit the selected category.

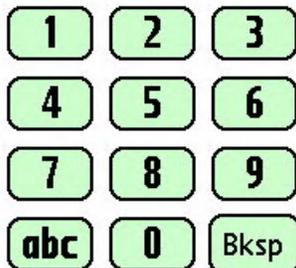
To enter a new field name, enter the field name in the text area, and then tap Add.

To edit an existing field name, highlight the field name to edit, tap the edit icon, change the field name text to what is desired, then tap the Update button (Add will change to Update when editing).

Setting or Changing the Password:

Change Password

New Password:
Retype Password:



Hide Input

For maximum security, a password is recommended. To set or change the password, tap the Password button on the main list screen.

Enter the old password if one exists, then enter the new password and retyped password. The 'abc' button will bring up the on screen keyboard for easier text entry. The left arrow button will backspace one character.

Since the password is used to encrypt each record, and the actual password is not stored on the handheld, your password cannot be recovered if lost or forgotten. Also, when changing the password, each record must be decrypted with the old password, and re-encrypted with the new password. For this reason, it may take a minute or two to process this when changing the password. We recommend that a password be setup before many records have been entered.

Password Generator:

Password Generator

Length: ▼ 8.....

Include:

- Lower case (a to z)
- Upper Case (A to Z)
- Numbers (0 to 9)
- Symbols (!\$%}&[., etc)

Ku7p0q64.....

InfoSafe also includes a random password generator to generate random passwords of a user-specified length. The type of characters included in the randomly generated password can also be selected.

After the password is generated, it will be pasted into the focused field if a record was being edited. Also, the generated password will be placed on the clipboard for easy pasting to another field or in another application.

To generate a random password, select the options and tap the Generate Password button.

Preferences:

Preferences

Force delay of 10... seconds after 3... failed password attempts

Destroy data after 20... failed password attempts

Set/Change Password

- Backup Databases on Hotsync
- Confirm Delete Operations

Done

The Preferences screen allows security options and other preferences to be selected.

A delay can be forced after so many failed password attempts. Also, an option is available to destroy all data after a specified number of failed attempts (use this carefully).

Other options allow the database backup on hotsync (Palm OS only) and other options to be turned on or off.

Menu Options:

A menu system is available to perform additional functions on the handheld.

File Menu:

Export Record to Memo— while viewing any record, select this option to export the record as text to a new memo. Note that the memo will not be encrypted.

Export All Date (CSV) – select this option to export all records as text to a new memo. Fields will be separated by commas. Note that the memo will not be encrypted.

Beam Record – while viewing any record, select this option to beam the current record to another InfoSafe™ user. When the receiving user starts InfoSafe™ on their handheld, the new record will be imported with no additional work. Note that each record must be imported by the receiving user before receiving another record.



Edit Menu:

Edit Categories List – selecting this option will display the screen to allow the user to edit the master list of categories.

Edit Fields List – selecting this option will display the screen to allow the user to edit the master list of field names.

Password Generator – displays the random password generator screen.

Cut/Copy/ Paste – standard functions.

On-Screen Keyboard – displays the on-screen keyboard.



Help Menu:

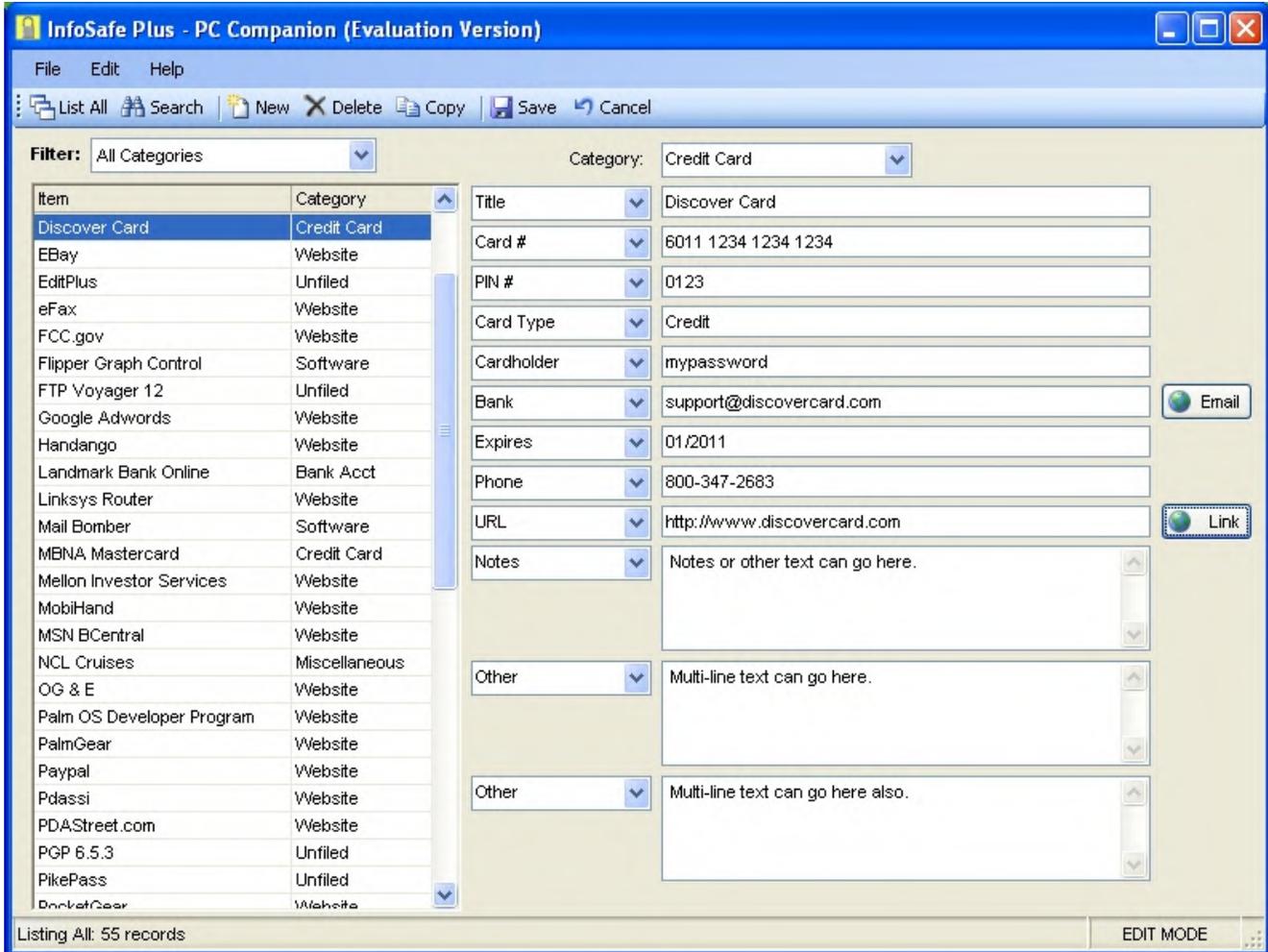
Help – selecting this option will display the help file available on the handheld.

About – selecting this option will display the About screen, including the version number.



InfoSafe Desktop:

The Plus version includes PC desktop software to manage information from the PC. The PC software includes all of the features on the handheld software, plus other features specific to the desktop software. Features available only on the desktop software include printing selected records, printing all records, importing records from delimited text files (CSV, etc.), exporting records to a CSV file, and more. Consult the help file on the PC desktop software for further information on the desktop features.



Conclusion:

If you are just evaluating or have already purchased InfoSafe™ – Thanks!

If you have questions about the software, or cannot find an answer to a problem at our site, please email our support staff. We will work hard to resolve your issue and answer your questions.

