

DataSafe User Guide

Version 1.2

Overview

DataSafe is a highly secure Data Storage system for storing sensitive data encrypted with a highly secure algorithm and user defined password. The following User Guide explains how to perform general activities.

For support, updates and further information please visit www.exceedit.co.uk.

Important information about using DataSafe

When using DataSafe on a portable drive (e.g. a USB) drive it is **VERY IMPORTANT** that you do not disconnect the portable drive from your computer before the activity light has stopped. It is also recommended that you use the Windows “Safely remove hardware” option (found in the system tray when the device is connected, it can be identified by a green arrow icon).

Should you remove the drive during this time it is very likely that your data file will become corrupted and unusable. Please contact support for further information.

For this reason we highly recommend making a backup of DataSafe at suitable intervals so that it can be restored if required.

What computer specification does DataSafe required?

DataSafe has been tested to work with MS Windows 2000, Windows XP Professional and Windows XP Home editions. An available USB port is required for the USB Drive. DataSafe is only compatible with MS Windows computers.

What is the wizard?

When you first run DataSafe you will be presented with a setup wizard. The wizard will only run once and will allow you to select a username and password for accessing the system.

The username is the name that DataSafe knows you as. You can change both the username and the password from the options screen at any time.

Please see “What is my password” below for more information on choosing a password.

What version of DataSafe do I have?

The version number of your DataSafe software can be found on the Splash screen during startup and also in the “About” tab of the “Options” screen.

How can I obtain support?

Links to email and web support can be found in the “Options” screen then “About” tab. Additional information can be found at www.personalDataSafe.com

What is my password?

Your password is the only way to access your data. It is important to select a password that you will remember but others will find it hard to work out.

To help ensure your password is secure we have created DataSafe to require an 8 character password that must contain at least one number and one letter.

How can I change my password?

You are encouraged to change your password at regular intervals. This can be achieved by going to “Options” and then selecting the “Security” tab. You will then be able to change your username and password.

Please note: To change your password you will have to enter your original password and then enter a new password and confirm it. If you have a large number of entries in DataSafe it may take a short time for the password to change.

What happens if I have forgotten my password?

Should you forget or lose your password then any data within DataSafe will become inaccessible. For this reason it is important that you use a memorable but secure password.

What is the details tab?

The details tab is where you can store your personal details (such as name, address etc) inside DataSafe. Select the “Details” tab and then fill out the relevant fields. Remember to click the “Save” button when making any changes.

You can also store personal “medical details” under the “Home” tab in a similar fashion.

How do I Enter/Edit information?

DataSafe allows you to store a variety of information grouped by categories and sub-categories.

For most items - such as bank accounts, credit cards, passwords and contacts – you can make multiple entries. Where this is possible you can do the following:

- Click “Add” to display an editor window and add a new item
- Click “Open” to open a currently selected item in an editor window
- Double click an item to open an editor window
- Click delete to remove an item – you will be prompted for confirmation

You will typically also have a back option to return to the main menu for a relative area.

How do I Print/Export information?

DataSafe allows you to Print/Export any item it contains via the following options:

1. To Backup the data in DataSafe use the Backup tool in the “Options” dialog. See below for more information. The data will be stored in an encrypted DataSafe format that only DataSafe can access.
2. To Print or Export a single item from any area in DataSafe, select the relevant item so that it is displayed in its editor and click the “Print” button. A preview window will appear from which you can set print options and print or save in either PDF or Rich Text formats.
3. To export the whole contact list, select the contacts area and click on the Import/Export wizard. See below for more information.

Please note that you can only print/export one item at a time for improved security.

How do I Import/Export contacts?

It is possible to import/export contacts using the import/export button from the contacts area. Follow the guidelines in the wizard to perform the required action.

Import

The file that you wish to import must be a “Comma Separated Values” (CSV) file containing the following 11 fields.

Firstname, Lastname, Company, Address, Office tel, Home tel, Mobile tel, Email, Website, Date of birth, Notes

All fields must be present but if you wish you may leave fields blank by entering a double comma (,,) to denote an empty field.

The easiest way to prepare the CSV is to use a spreadsheet package (E.g. MS Excel).

1. If you already have a CSV file from another system (e.g. MS Outlook, MS Access, etc) then open the file in the spreadsheet and check that the relevant columns are present. If necessary use the spreadsheet package to add/move columns as necessary to match the above pattern.
2. If you do not have an existing file then you can open the spreadsheet package, enter the items as above and then save the file as a CSV file.

The first row is considered to a header row so please either include a header (you can use any column header names so long as the order of columns is correct). If you do not have a column header row then you can just leave a blank row at the top of the file.

Please note, to import contacts they must be in the format specified – please verify the details in the preview before continuing with the import. If you notice a problem return to the previous step, adjust the file and re-import it.

Export

To export items follow the guidelines in the Wizard – The exported file is always a CSV file in the format supported by Import above.

How can I search for information?

You can use the search option to search through all of the areas in DataSafe. The search option looks for items that match the keyword or phrase that you specify. You can double click items to view/edit details for the search results.

Please note: The search feature does not search in the single item areas – e.g. details and medical details. Additionally, it does not search in any user files on the USB drive (Just the data file).

What is the file manager?

You can store private files safely in Datasafe using the file manager.

Files can be grouped together in folders in a similar fashion to MS Windows. Use the Import/Export buttons and right click menu for import, export, delete and new folder options.

How can I backup/restore my data?

You can backup your data at any time by going to “Options” and then “Backup/restore”. Select the location to back up to (a *.dsb file) and click the “Backup” button

You can restore your data at any time by going to “Options” and then “Backup/restore”. Select the DataSafe backup (*.dsb) file to restore and click the “Restore” button.