Ilium Software
eWallet®

Step-by-Step Tutorial
for Windows Mobile-based Pocket PCs

Version 4.0

Ilium Software

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Welcome to eWallet

Welcome to Ilium Software eWallet®, the award-winning way to safely and conveniently store your important, confidential information on your Windows Mobile-based Pocket PC.

This manual presents a *step-by-step guide* for using eWallet on your Pocket PC. If you're looking for specific information in more of a reference format, please look in our Ilium Software eWallet User's Guide and Reference, which is set up in a way to quickly allow you to find out just the information you're looking for.

It's easiest to use this manual with your Pocket PC running eWallet, so that you can try out the steps as you read.

eWallet is *also* available for your Windows PC. The files are completely compatible, and you can use the **Microsoft ActiveSync** to synchronize them, or just move them back and forth. Get documentation about synchronization, as well as about eWallet on your Windows PC, in eWallet User's Guide and Reference.

Additionally, eWallet is available for Windows Mobile-based Smartphones and Palm Powered™ handhelds.

If you have questions, Ilium Software's world-class technical support is always happy to answer them. See Contact Ilium Software for more info.

You can also get additional support, including frequently asked questions, product upgrade information and tips at any time from our website, www.iliumsoft.com

Thank you for your interest in eWallet.

How to Use this Document

This is a *step-by-step tutorial* with complete information about how to get started using eWallet. If you're looking for specific information in more of a reference format, please look in our eWallet Users' Guide and Reference, which will let you quickly and easily find the answers and information you're looking for.

Protecting Your Cards contains the most important information about how to be sure that your cards are protected with eWallet's strong encryption. If you don't read anything else, please do read that section.

If you know how to create and modify cards, but want to be sure you have enough information to use eWallet effectively, start by reading **Three Essential Features**.

Ilium Software, the makers of eWallet, are committed to providing both high-quality software and excellent technical support. If you have questions about eWallet that this document doesn't answer, please do email or call us, and we'll answer them directly.

Getting Started with eWallet

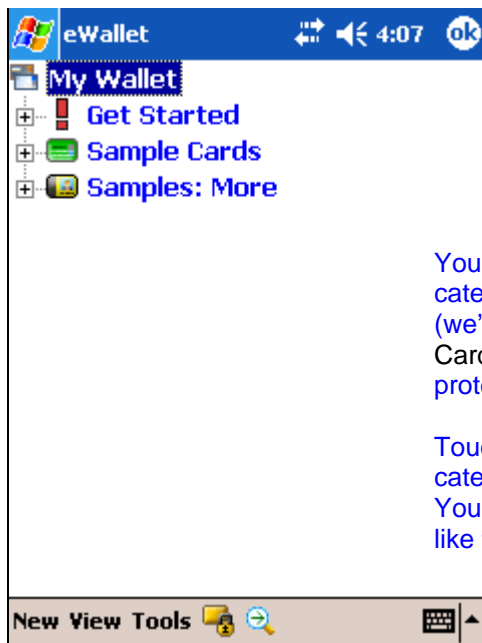## First Steps

Start eWallet on your Pocket PC by choosing **Programs** from the **Start menu**. From the Programs window, choose eWallet.

When you first install eWallet, you'll get a set of sample cards. You can look through these cards to get an idea of what you can do with eWallet.

Each card is an a category. All eWallet cards are organized in categories.

When you first start eWallet, your screen will look like this:

A **category** is a way to organize your **cards**, which contain your actual information. You can think of categories in a wallet file like folders on your PC desktop: you can have as many or few as you want (though you must have at least one per wallet file), and any of your cards can be in any category.
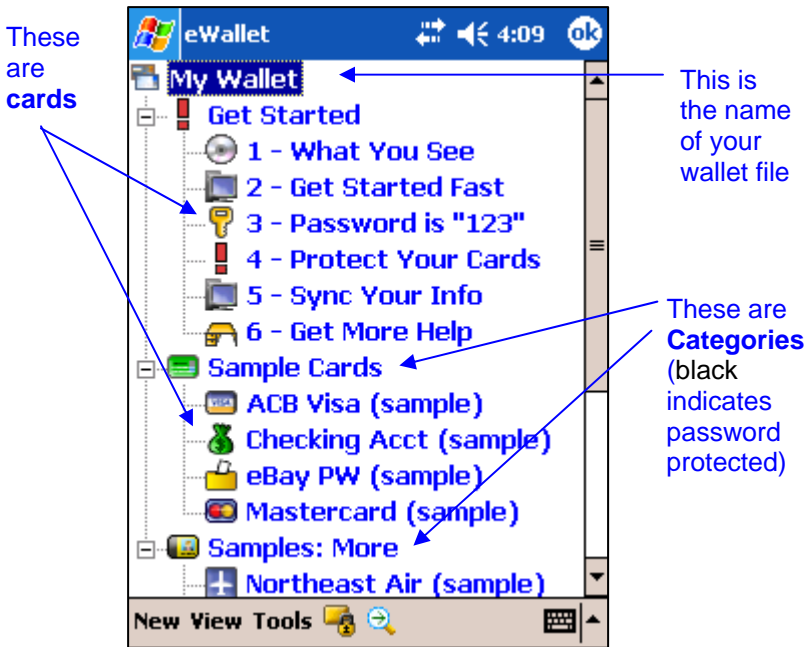

You're seeing the sample categories we've supplied (we've changed Sample Cards to be password protected)

Touch the ⊞ before each category to expand it. Your screen will then look like the one below.

Now your screen looks like this:

These are **cards**

This is the name of your wallet file

These are **Categories** (black indicates password protected)

A **wallet file** is a file on your Pocket PC or Windows PC containing eWallet information, both cards and categories. We start you out with one wallet file, called **My Wallet**, but you can make more if you want. For example, you might have separate wallet files for personal and work information, or for other members of your family or company.

List View

You're looking at eWallet's **List View**, where you see both the category and card names in a list in one screen. Later, we'll look at **Icon View**.

Since the cards are what contain the actual information, let's look at some cards. Touch the **Visa Sample** card (once) with your stylus to open it.

Now you see the Visa Sample card on your screen:

Main Card Display

Details and Notes area

Navigation Arrows

New menu button
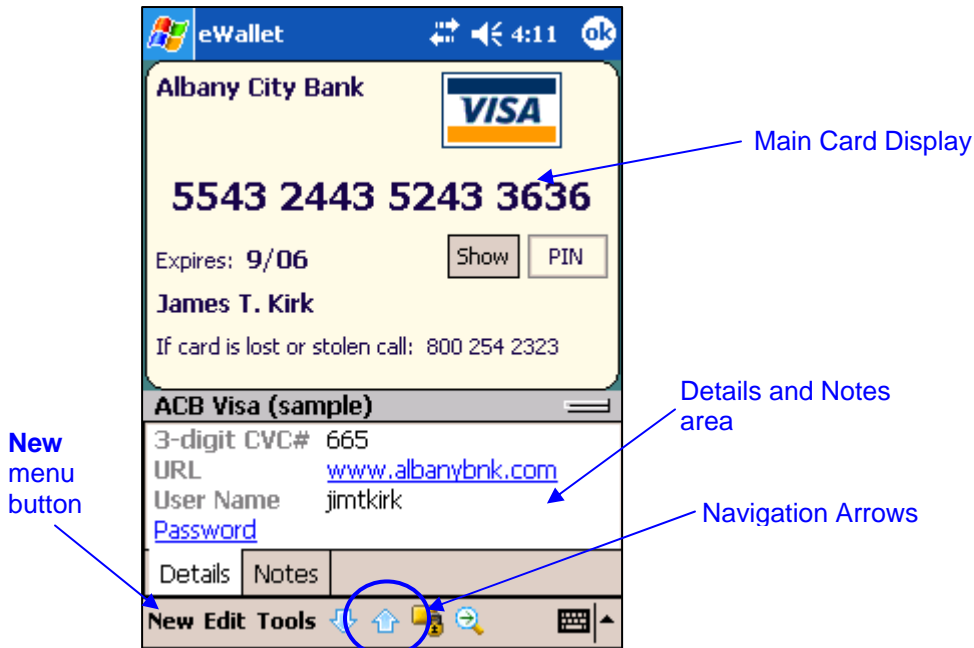
Each card in eWallet has information specific to the type of the card. For example, the sample credit card shown above has the name of the card issuer (EarthBank), card type (Visa), Credit Card number, expiration date, a Personal Identification Number (touch the **Show PIN** button to see the PIN), the owner's name, and a phone number to call if the card is lost. You'll be asked for this information any time you make a new card that's a **credit card**.

The bottom of the screen shows the **Details** and **Notes** pane. Use the fields in the Details pane for additional information that goes along with the card, such as a URL, username and password. You can use the Notes pane to put in any kind of information you want: your credit limit, billing cycle close date, a note to yourself, etc. Simply tap on the Details or Notes tabs to switch between the two.

You can always leave any fields blank if you don't want to use them.

Use the Navigation Arrows (marked above) or the hardware up and down buttons on your Pocket PC to see all the rest of the cards in the "My Wallet" wallet file.

When you see the Visa Sample again, you've seen all the supplied and sample cards. Now we'll add a new card.

With the Visa Sample showing, touch the **New** button on the **menu**. You'll see a screen that looks like this:
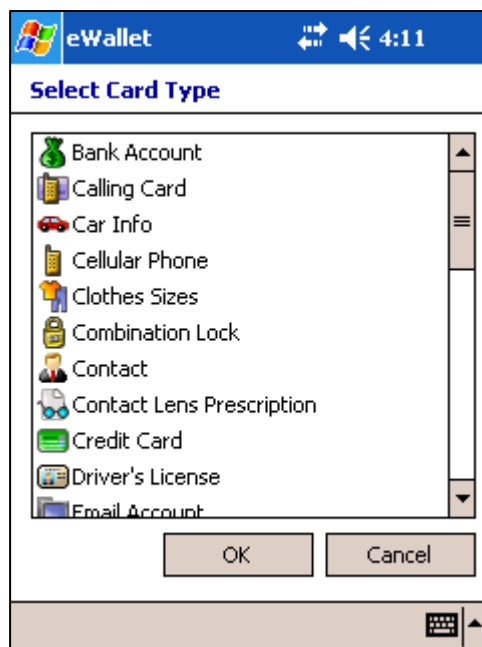
This screen lets you choose which type of card you want, from the list of 32 provided types. The card type you select controls what fields you'll be given for your information. You'll be able to change the icon for any card.

(If you don't see this screen from the New button, you probably chose New from the List View rather than from within a category. If you see a different screen, select Cancel from it, then go back to looking at the Sample Visa card and then choose the New button again.)

From the New Card screen ← select **Credit Card**, then choose the [ok] button in the upper right corner.

You'll see a screen that looks like this (depending on which input method you use, the bottom of the screen may look different):
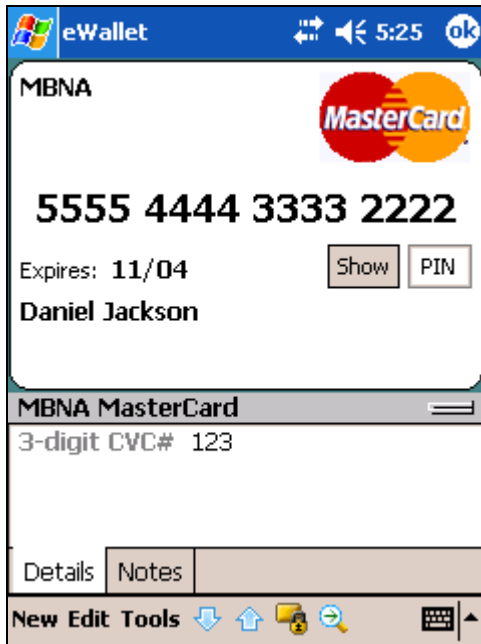

Card Properties Window

Enter MNBA for the Card Provider, and choose Mastercard from the Card Type list. For the Card Number, put in 5555 4444 3333 2222, and 11/04 for the Expiration Date. Enter 9999 for the PIN, and Daniel Jackson for the Name on Card. You may need to scroll down to enter a phone number, but just leave that field blank for now. Scroll down and enter 123 for the 3-digit CVC#.

Now touch the **Settings** tab. You'll see:

Change the **Hidden Field** selection from **Hide** to **Show**. Then touch the **Icon button** and choose the **MasterCard icon** from the list that displays (you'll need to scroll the list down to find it). Uncheck the "Icon in Card" option since this card already has a credit card logo. Then choose [ok] to dismiss the icon list. You'll be back in **Card Settings**.

Choose the [ok] button again. You see a screen that asks you for a name for the new card, but the name will be pre-filled in with MNBA. Add a space, then type "MasterCard and tap [ok].

Now your screen should look like the following:

New MasterCard

If you want to change any of the information on your card or in the Details area, or any of the settings like card color, just *tap on the card area*. You'll be returned to the Card Properties window. From there, you can change the information using the **Fields tab**, or the card colors, icon, or other settings using the **Settings tab**.

If you want to add a Note, just tap on the Notes tab, and enter the info you want.

When you're done editing your new MasterCard card, select ok while the card is being displayed. You'll be returned to eWallet's **List View**, with the new card added.
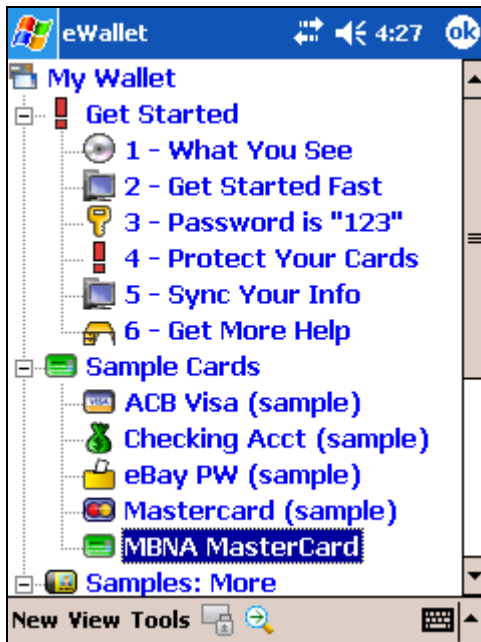
Here's the new card you just added. Tap the name once if you want to see the card displayed again.

There are only 3 more things you need to know in order to be able to use easily and effectively.

Three Essential Features

Remember while reading this section that there are 2 basic objects in eWallet: **cards** and **categories**. Cards contain your information. Categories are just used to organize cards. All cards need to be in categories.

Tap + Hold Menus

The easiest way to find out what actions are available on any object is to **Tap + Hold** your stylus on the object. A menu will appear with all of the actions you can do on that object. Any actions that aren't currently available will be greyed out.

For example, when you're looking at eWallet's List View, if you Tap + Hold your stylus on a card name, you'll see the following:
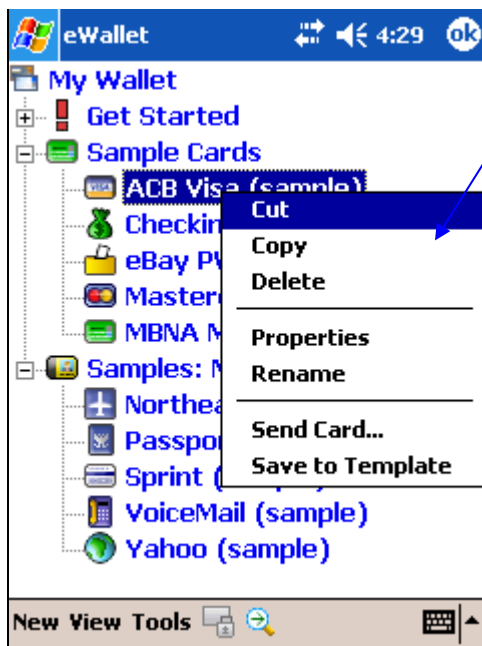
A Tap + Hold menu for a **card**

The menu that appears when you Tap + Hold your stylus on a card name shows you all the actions you can do on that card. For example, choosing **Properties** from this menu will take you directly to the **Card Properties** window for this card, rather than you having to first display the card, then tap on it to get to that window. You can copy a card to the clipboard for pasting into a different category or duplicating, send your card to another device using the infared port, etc.

If you Tap + Hold your stylus on a *category name*, you'll see the actions available for you to do on that category.
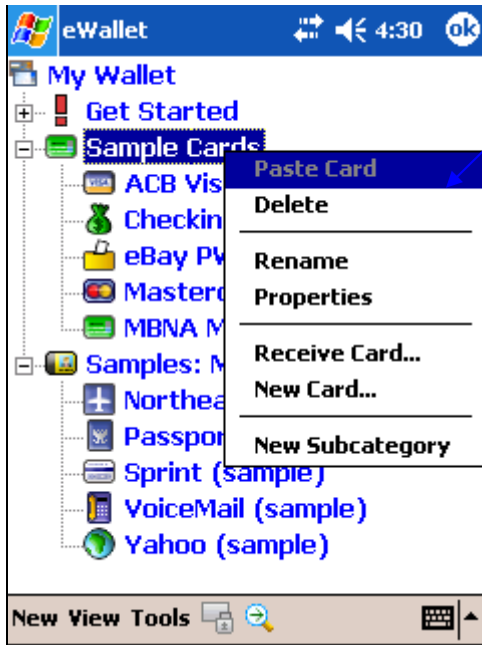
A Tap + Hold menu for a **category**

Category Properties

Just like cards, categories can have properties that you can change. Like cards, you can change the **name** of a category and the **icon** associated with it. There are 2 other properties of categories that you'll need to know about.
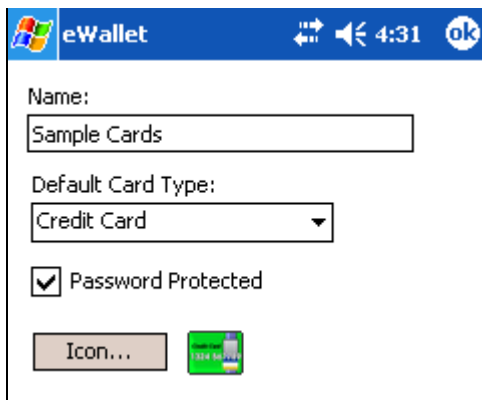
Default Card Type lets you select what will be the initial type selected when you create a new card in that category. You can always change the card type, and you don't need to have only cards of the same in any category. This pick just controls the initial setting for new cards. You can pick any of eWallet's available card types from the list.

The **Password Protected** option is where you control whether you need your wallet's password to see any of the cards in the category. This is the most important thing you need to understand about how eWallet works.

Protecting your Cards

You can think of your eWallet file like your regular wallet. Some of the information is confidential (like your credit card numbers) and some of it probably isn't (like your family pictures, or a card with reference information). eWallet allows you to protect your confidential information, but still have fast access to other info in your same wallet file.

You do this by putting the cards with confidential information into categories that are **password-protected**, and the ones you don't want to protect in categories that are not. To password-protect a category, just do the following:

1. Tap + hold your stylus on the category name, and select Properties from the menu that appears.
2. Check the Password Protected box on the **Category Properties** window.
3. Click ok to save your changes.

eWallet will ask you for a password any time you try to see a card in a password-protected category and your wallet is **locked**. Your wallet is automatically locked when you first open it, and remains locked until you unlock it with your password. Then it remains unlocked until you either:

- close the wallet file (by choosing ok until you're back at the list of wallet files)
- lock the wallet file (by tapping the **lock icon** on your menu bar). This icon is grey (disabled) when your wallet is locked (since you can't lock it), and green (enabled) when your wallet is unlocked

Your wallet file is already locked, so you can't lock it.

Your wallet file is *unlocked*, so you can lock it by touching the lock icon.

or until eWallet automatically closes your wallet file, if you've chosen to have it do so. Please read the **eWallet Security** in eWallet Users' Guide and Reference for more information about how to do this.

In the sample My Wallet file that you're looking it, the wallet file is currently locked, as you haven't entered the password. But since the categories start out without password-protection being on, you were still able to look at the cards.

For example, if your wallet file has 3 categories:

- Credit Cards
- Family Pictures
- Bank Accounts

you would password-protect Credit Cards and Bank Accounts. When you opened the wallet, it would be locked. If you tried to look at a card in Credit Cards, you'd be asked for your password. Then, you'd be able to look at any other cards in Credit Cards, as

well as any cards in Bank Accounts *without entering your password again* until you locked or closed your wallet..

To see this work, do the following:

1. In the My Wallet file, Tap + Hold your stylus on the category called **Sample Cards**, and pick **Properties** from the menu.

2. Check **Password Protected** on the Card Properties window.

3. When you choose ![ok] eWallet will ask you for your password. If you haven't changed your password, enter **123** on the big password keypad.

4. When you choose ![ok] again, you'll notice that the lock icon is now *enabled*. Your wallet has now been unlocked.

5. Now Tap + Hold your stylus on the category called **Samples: More**, and pick **Properties** from the menu.

6. Check **Password Protected** on the Properties window.

7. You'll notice that when you choose ![ok] this time, you're not asked for a password. This is because you've already unlocked your wallet file.

8. Look at the Visa Sample card by on the card name. Choose ![ok] when you're done.

9. Now lock your wallet file by tapping the **lock icon** ![icon] on the menu bar. You'll see that the categories close back up and hide the card names.

10. Open the **eWallet Info** category by tapping the ⊞ in front of its name. You're not asked for a password, because this category is not password protected.

11. Open the **Sample Cards** category by tapping the ⊞ in front of its name. Enter **123** when you're asked for the password.

12. Open the **Samples: More** category by tapping the ⊞ in front of its name. You're not asked for a password, because you've already unlocked the wallet file.

<mark>We recommend always locking your wallet file when you're not actively using it.</mark>

You'll also be asked for a password any time you try to change a password or configure your wallet file in any other way (see eWallet Options). <mark>Be sure to change the password on the My Wallet file, or create your own new wallet file with your own password, before entering any of your own confidential information.</mark>

To change the password of any wallet file, choose **Change Password** from eWallet's **Tools** menu. If your wallet is locked, you'll first be asked for your current password.
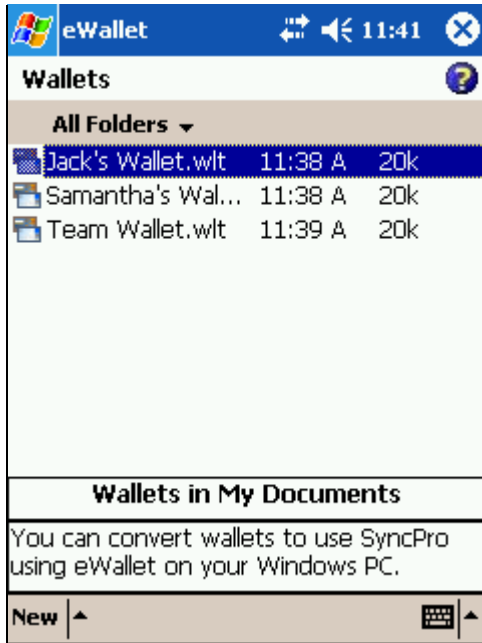
To create a new wallet file, just select New from the menu bar in the Wallet File list screen. You'll be asked to choose a file name and a password. Read more about wallet *files* in the **Working with Files** section of the eWallet Users' Guide and Reference.

To get to the file list, just keep tapping [ok] while eWallet is running until you reach the file list screen.

To set eWallet to automatically lock any wallet file whenever you're not using it, choose **Configure** from eWallet's **Tools** menu. From there, you can select timeout locking and other security features. Read more about these options in the **eWallet Security** section of eWallet Users' Guide and Reference.

Selecting a Password

Choose a password that's easy for you to remember, but would be hard for anyone else to guess. It is best (most secure) to choose a password that is at least eight characters long and contains at least one non-alphanumeric character. One convenient way to do this is to choose two unrelated words and separate them with a dash, asterisk or other non-alphanumeric. For example, "clock-kitten" would be a reasonable password.

Please note that if you forget a password, you will not be able to access any of the protected (by a password) information in eWallet. *Choose your passwords carefully.* Remember that passwords are case-sensitive -- if your password is not being accepted, check that your Shift-Lock is not on.

eWallet Views

Within eWallet, you can look at the contents of any of your **cards**, or at a summary of all of your categories and cards, using eWallet's List View described above. You can also look at a summary of just your categories, or of the cards in any one category, using **Icon View**.

Icon View is similar to List View, but instead of showing both cards and categories, like List View does, Icon View shows either all your categories, or all of the cards in one category at once.
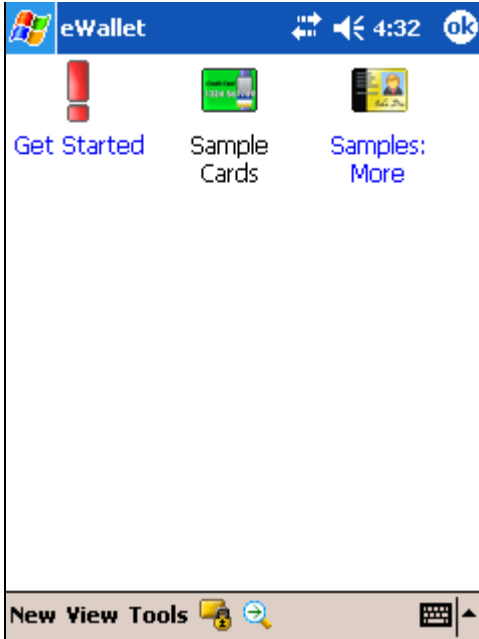
Here, you're looking at eWallet's Icon View with the **Categories** showing. When you tap one of the category icons, you'll see the icons representing the _cards in that category_.
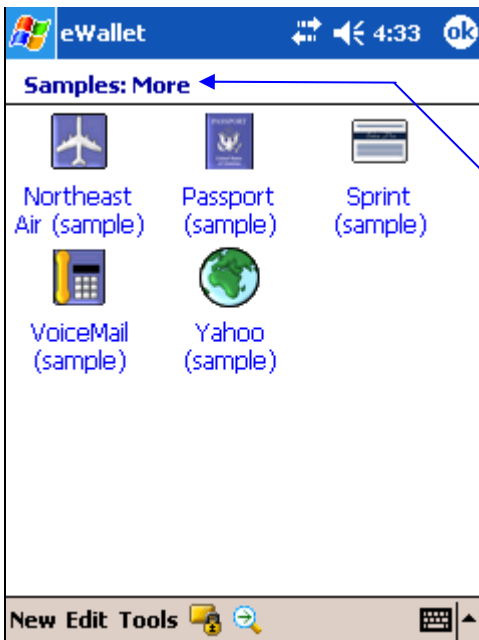
Here, you're looking at eWallet's Icon View with the **Cards** in the "Samples: More" category showing. When you tap one of the card icons, you'll see the contents of that card. You'll see that the **name of the category** is at the top of the screen, and that you have different **menu** options available.

Remember that you can Tap + Hold your stylus on any of these icons at any time for a quick way to see what you can do and a quick path to doing it.

You can switch back and forth between Icon View and List View using eWallet's View menu. You'll see the View menu either when you're in List View, or when you're in Icon View looking at the Category icons.

Summary

At this point, you should know:
- the difference between *cards and categories* in eWallet
- how to *create and modify* a new eWallet card
- how to *protect the information* in your eWallet files
- the difference between eWallet's *List View and Icon View*
- how to use *Tap + Hold menus* in eWallet.

You're now ready to begin using eWallet with your own information. You can either decide first how you want to organize your information, or just start creating cards. You'll be able to move them any time between categories using cut and paste.

You can find complete eWallet documentation in our eWallet Users' Guide and Reference. This document is set up in a way to quickly allow you to find out just the information you're looking for.

It's also up to you whether you want to keep using the My Wallet file by deleting each card in it and adding your own, or just create your own wallet file. Again, you can always change your decisions later.

Getting More Information

Product Help
Get specific information about eWallet features and functions right when you're using eWallet in eWallet's Help system. On your Pocket PC, just choose Start/Help when eWallet is running to see eWallet's Help.

Users Guide

Get more information about any of the features and functions of eWallet in our eWallet User's Guide and Reference, which is set up in a way to quickly allow you to find out just the information you're looking for.

Online Information
Frequently asked questions, tips, upgrade information and other support information is available at any time on the eWallet Support page of our website.

Contact Ilium Software

Ilium Software, the makers of eWallet, are committed to providing both high-quality software and excellent technical support. If you have questions about eWallet that this document doesn't answer, please do email or call us, and we'll answer them directly.

For **Technical or Customer Support**, email us at support@iliumsoft.com any time, or or phone us at (888) 632-5388 (toll free) or +1 (734) 973-9388

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