

# LifeBank

## Step-by-Step Instructions & Guide

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### Introduction

Thank you for purchasing the LifeBank data-key app.

Your LifeBank data-key app is the only resource of its kind.

It is a legally designed solution to an extensive, and potentially expensive, problem that everyone ultimately faces.

**If something happened to you, how would anyone be able to find all of your important details and documents?**

The LifeBank data-key solves this issue simply and ingeniously. It collects and protects all of your essential details and documents together, and ensures that only your most trusted person will have access to them when needed.

This data-key could literally save you and your loved ones countless thousands in advisor fees and expenses. It will also save unnecessary anguish (and time) for those charged with having to take over your life affairs. It may also save your life, if you are confronted with a medical or health related emergency.

### Safe from internet or cloud exposure

The data you enter into the LifeBank data-key stays only on the data-key. This means you can take it anywhere and use it anywhere, and even update your computer without losing your important information.

Importantly, it does not store ANY of your information on the internet or cloud. So you safely maintain complete control over your valuable data.

### Key features overview

- Legally developed. Tells you exactly what critical details and documents you need to save
- Collects and protects your important files directly and discreetly onto the data-key

- Fully interactive. Easy to use interface
- Safely keeps all of your data off the internet or cloud
- Copy protected. Does not work if copied to any other device without Activation Key
- Allows for unlimited users – perfect for the whole family
- Very easy to update your files
- Automatically saves your data
- Allows you to print out hard copy backups
- Features an Emergency/medical button in case of an emergency
- Name, date and time stamps your information page/form
- Large clear visible text
- Suitable for mac and pc
- Password protection

### Launching and and registering your LifeBank data-key

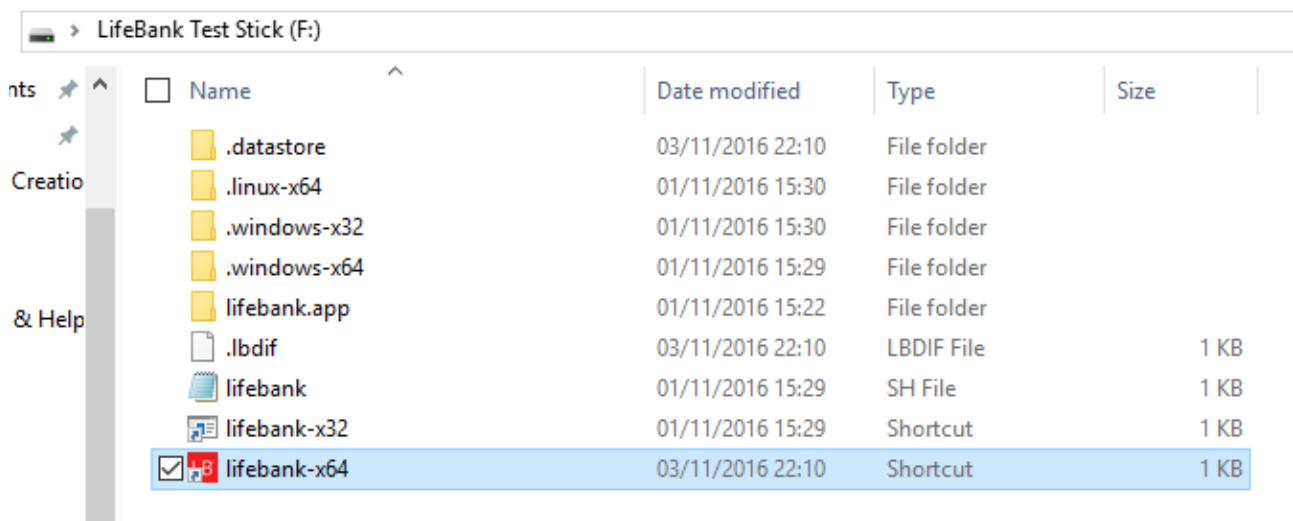
Connect the LifeBank data-key (USB) to a Mac or PC computer

Locate the data-key on your computer (titled either USB or LifeBank).

Click on and open it, ignore the folders and choose one of the three bottom icons: – one icon opens the Mac version – the other icons open the PC version (32 or 64 bit).

Click the version that will work on your computer and the app will launch.

A screen will now open for you and ask you to register (if you have not done so already). After you have received an email with your Activation License Key – enter your name and registered email address.



## Installing your own data-key

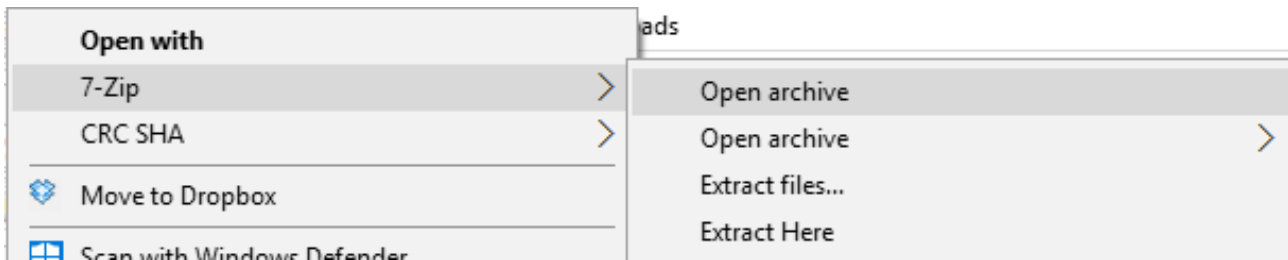
You should have received both an email with your Licence Key and an email with a download link to the compressed application file.



Download and save the file to any convenient location. Open the file with an archiving program. We recommend Winzip or 7-zip, the built in archiver on Mac will also work.

Use the programs **extract** function to extract the files and when asked to choose a place for the extracted files select your data-key.

Having installed the necessary files and directories onto your data-key you can now proceed in exactly the same way as outlined above for a pre-installed data-key.



A new 'Home screen' will now open. You have now launched the data-key and will not need the Application License Key again.

## The Password

The encrypted password is only stored in your data-key – not on the web or cloud, to keep it private!

If the issue persists contact [info@lifebanksystems.com](mailto:info@lifebanksystems.com)

## Creating a password

Now you have launched the data-key, you must create a password to use it.

It must be a minimum of 8 characters. Copy it down somewhere discretely so you remember it.

### Important

If there is an issue with regard setting up the Password, ensure that there has been the exact use of caps, upper or lower case and the number "0" as against the letter "O".

You can change it or reset it, at anytime later if you wish.

Every time you use the LifeBank datakey, you will be required to enter in this password.

If you have any ongoing issue with regard to the Password, contact us at [info@lifebanksystems.com](mailto:info@lifebanksystems.com)

## Congratulations!

You are now ready to explore the contents of your LifeBank data-key!  
Overview of the main menu buttons

## Instructions

This opens up the instructions (the ones you are now reading) as a PDF for download or printout. Refer back to these with any issues you may have.

You may find it helpful to print out the pdf and thereby have these Instructions / Guide at your side when using LifeBank.

## Hide Sections

By default all the sections on LifeBank are visible.... however you may choose to show or hide individual sections when logging in. This is done by choosing “Yes I want to hide content” when entering your password.

You can now choose which content is visible during this session.

## Home button

This takes you back to the home screen.

## Forms button

This opens up one of the most important functions of the data-key – the index of sections containing fully interactive fill-in forms. These important forms will be used to save all of your critical personal details and information. They also provide you with important legal Quick Tips.

## Usage report button

Allows you to create a simple report showing exactly what you have completed, and what remains to be completed. Look for the percentage symbol and date. The report can either be printed or emailed to help you send updates of your progress to your professional Advisors.

## Documents (add/view) button

This allows you to save copies of your essential documents and store them in pre- labelled folders (i.e. your Will, Insurances, bank statements plus more).

## Photos (add/view) button

Allows you to add and view all of your important photos to the data-key.

## Trusted person button

Important resources and information to help your most trusted person deal with your LifeBank file if something were to happen to you.

## Document locator button

The Document Locator tells you exactly which documents (i.e. your Will, Life Insurance etc.) you need to keep safe and where they will be stored (if not on the data-key). It is ideal for those who do not wish to save their documents onto the data-key (so your trusted person can find them when needed).

## Emergency/medical button

This button provides you, (or someone you trust) with instant access to your health and medical details in the case of an emergency.

## Create a backup button

Create an encrypted zip file of all your personal details, documents, photos and other files using this function.

Select a location on your computer to save the backup files to.

## Restore from backup button

This allows you to restore your info saved in the Backup file. The Backup files can only be read using a LifeBank data-key.

The Backup files will replace all current data on the data-key.

## Print this section button

This allows you to print out an entire section of forms as a hard copy, (including all text entered). These hard copies may be used as a backup or can be provided to your trusted person for safekeeping.

## Print this form button

This allows you to print a single page as a hard copy. This hard copy may be used as a physical backup or provided to your trusted person for safe keeping.

## External (Shared) Users

This button allows you to create users who are able to access and change data on your data-key via the LifeBank Server. By default there are no such users and data is kept on the data-key only.

When an external user is created only the relevant data is kept on the server and this is deleted as soon as the access expires.

## Change User

This button takes you to the start screen where you may change to a different user name.

## Messages

This allows you to send (and receive) messages from.

- The Account Administrator.
- Any External Users you have created
- Note:  
For individual customers the Account Administrator will be the LifeBank representative for your area, for corporate customers this may be an internal company administrator.

## Instructions

Click on the Instructions/help button to open up a pdf document of these very instructions. These instructions are accessible from every screen within LifeBank. This pdf can be downloaded or printed out. Refer back to these instructions with any issues you may have.

## LifeBank forms

### Enter your important details into LifeBank

The LifeBank application opens up on the **my LifeBank forms** button automatically. Familiarise yourself with the **main menu** side-bar buttons.

On the main screen (to the right of the side-bar menu) you will see the index of sections (as below):

Use the **scroll bar** on the right hand side to reveal all of the section titles. Click on each **section** title to reveal a sub menu **of interactive forms and information**

Interactive forms have an **arrow icon** beside them. Information pages have no arrow. Each form contains important questions for you to answer and features interactive text fields for you to fill in.



Complete these fields as best as you can, with as much detail as you can able. The text fields expand, so you will not run out of room.

Any information you enter into these text fields is **automatically saved** when you leave the form.

The information you disclose on these forms should only be accessed by you, or by a trusted person that you have nominated (if/when needed in the future).

You need only fill out forms and fields that pertain to your situation.

### **N/A button**

If any information requested of you on a form does not pertain to you, simply hover your mouse on the right hand side of the 'Question line' and you will see a N/A (not applicable) button appear.

Click on this button and the line will auto-fill with 'Not applicable.' Do this instead of leaving the line blank so that you or your trusted person will know that this category does not apply to you.

**Complete the sections - in whatever order, or preference, suits your particular circumstance.**

**Click on each section title to browse its content and interactive forms.**

Not all sections have interactive content to fill-in. Some are text. Some will be easy for you to complete immediately, others may require you to find the details and/or discuss with certain parties if it affects them.

Try to be as thorough as possible with completing the forms as just one missing detail can lead to significant problems later for you or your family.

Take your time! You do not have to complete all of the forms in one sitting. In fact, it may take you a number of sittings to complete them. Some will take careful consideration (such as the Living Will). Others forms will take research or family consultation (such as the My Heritage/Legacy Journal)

# Features of forms

## Click to create new form

If you need to record multiple entries on a form, use the '**Click to create new form**' button at the bottom of the form.

## Delete new form

Use this button to delete any new forms you have created. It will not delete any of the original forms.

## Name, date and time page stamping for your protection

The interactive forms automatically record your name, the date and time whenever you use them. This provides a vital record of your activity.

## Page numbers

The page numbers are on the top right of each page.

## Automatically saving your forms

Have no fear of accidentally losing your data! The App automatically saves your information and details on the forms that you enter. You will not lose it if you accidentally move to a new form.

## Reveal/hide the side-bar toggle

The square toggle/icon at the top left of the screen allows you to reveal the side bar menu, or hide it for additional screen space. The arrow points in the direction the screen will move to reveal or hide the side-bar menu.

## Check the percentage complete Icons

On the section index, on the left-hand side of each interactive form heading, is an arrow shaped 'Percentage complete icon'. Whenever you fill in information into a form, this arrow will change colour. On completed forms, the arrow changes to a green 'tick'. Also, on the right-hand side of each form heading, the percentage of the form completed is shown (from 0% to 100%).

## Create a backup

You can back up all of your details and documents onto encrypted files saved onto your computer or another storage device.

## Print any page (or print an entire Folder)

You can also print out copies of each page/form or entire sections as required.

## Roll over menu function

For quick access to forms, you can 'roll-over' your cursor on the My personal details button to access a mini-menu. The roll-over menu shows the full section names (out to the right). Upon rollover on a section name, another mini-menu of the subsection forms will also appear to the right of that.

## Explore button

On the top right hand side of the information bar (above each form), you will see a magnifying glass button. These buttons will either allow you to explore the topic of the form you are currently on, or find quotes from businesses related to the topic you are on. These buttons are a convenient way for you to gain further information that may be helpful to completing your LifeBank system.

## My Usage Report

The My user report button allows you to create a simple report showing exactly what you have completed, and what remains to be completed.

The report can either be printed or emailed. The report is a text only representation of the Main Index showing all section names, subsection names and the % completed for each subsection. The top of the report will feature your user name and a time/date stamp. This feature is designed to help you send updates of your progress to your professional Advisors or a LifeBank Consultant.

## My documents (add/view)

### How to add and view important documents onto the data-key

The 'My documents' (add/view) button allows you to add files of any important documents that are stored on your computer to your data-key (and view them later).

You have many important documents that need to be saved (e.g. your Will, Title, Insurance, Bank accounts to name a few). Check the Document Locator for details of the most important ones.

If you do not already have electronic versions of your documents, you should first scan them clearly to make an electronic file (e.g. a PDF or jpg file). Save these files to a clearly labelled folder onto your computer.

- Click on the My Documents (add/view) button.
- Then, select and click on one of the pre-labelled document folder in window at bottom.
- You are now inside the selected folder
- Click Save File(s) button
- This will take you to your computer where you can select the document you wish to save. • Find the correct document, and click OK (to save it).

## My documents (add/view)



SAVE FILE(S)

CREATE NEW FOLDER

- Advance Care Directions
- Bankruptcy
- Birth Certificate - Passport
- Copies of phone bills
- Copies of rates bills
- Copies of utilities bills
- Details of Bank accounts
- Details of investments
- Details of medical insurance
- Documents relating to Child Support
- Drivers licence
- General, Financial & Medical
- Health Care Information
- Latest Will
- Leases

SAVE FILE(S)

CREATE NEW FOLDER



...

No files

- The document name will now appear in the selected folder.
- This document has now also been encrypted.

## View documents

### How to view the documents you have saved onto the data-key

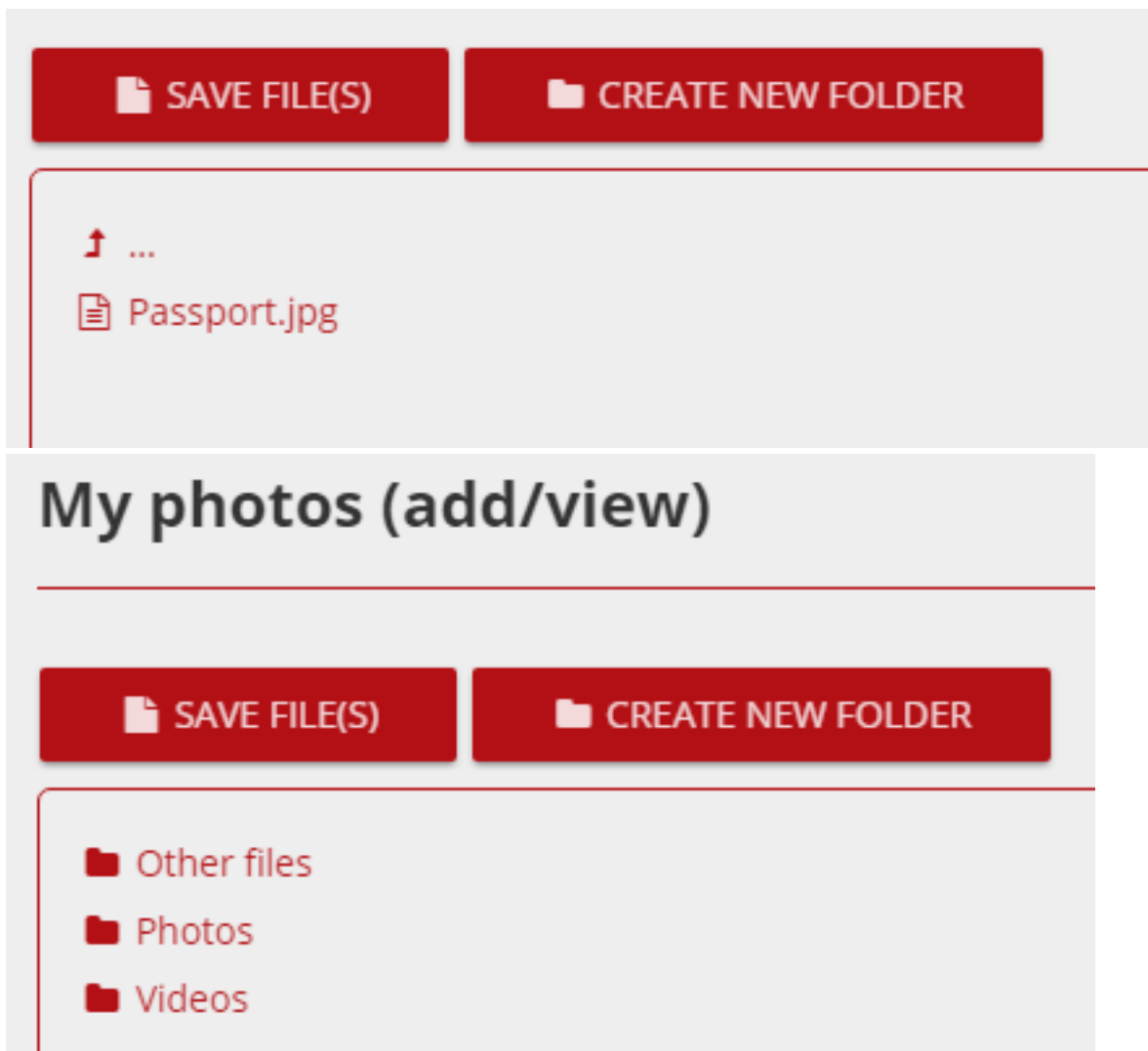
To view your documents, you must click on the saved file. The file will be opened in its default application.

## Photos (add/view)

### How to add and view your photos to you data-key

To save photos, images, video or content, repeat the above steps but use the **'My photos (add/view)'** button. If you do not already have electronic versions saved of your photos you should scan them and then save them to a labelled folder on your computer as an image file.

- Click the **'My photos (add/view)'** button
- Then, select and click on one of the pre-labelled document folder in window at bottom.
- A window will open revealing the folders on your computer
- Select the folder on your computer containing the photo/image files you have scanned/saved



- Click on the photo/image file you wish to add to the data-key
  - A message box will appear '**Now choose a folder on the data-key you wish to save to**' • Click '**OK**'
  - A new window will open up to your data-key folder labelled '**Save my photos**'
  - Find the correct file, and click OK (to save it).
  - The photo or file name will now appear in the selected folder.
- This photo or file has now also been encrypted.

## View photos

### **How to view the photos/other files you have saved onto the data-key**

To view your photos /other files, you must click on the saved file first and then click on the View button.

Repeat these steps whenever you need to add a document to your data-key.

## Create a backup

Create an encrypted zip file of everything saved on the LifeBank memory disk. You will see a 'Save file' dialogue window appear. Select a location on your computer to save the backup file to. This file can only be accessed by the LifeBank memory disk, it is not readable any other way. You can save a backup file on another storage device or even on the cloud if you wish.

## Restore from backup

Restores and overwrites from backup files you have saved previously.

## Trusted person

### **Important information for your most trusted person.**

One of the most important tasks you will be asked to do, is to consider and nominate your trusted person(s) (see **Important** in the my LifeBank forms (add/view) button).

To help you decide on this important matter, click on the '**My trusted person**' button.

The **'My trusted person'** button provides important information about the key responsibilities of your trusted person.

Your trusted person will be responsible for finding your LifeBank data-key and responsibly dealing with its contents in case of an emergency; or if you are incapacitated or pass away.

The integrity of the LifeBank system relies upon you nominating someone trustworthy for this role. It may be a family member, a friend or one of your professional advisors (such as your accountant or solicitor).


### Trusted Person

I nominate (and will notify) this Trusted Person to locate LifeBank.

**Their details are:**

Full name:

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## Important notification email

This pro-forma email to your trusted Person should be completed and then sent after you have discussed LifeBank with Your trusted person. You will be given the option of an automatic reminder to be sent every six months.

The My trusted person button also provides essential information to your trusted person to assist them when needed.

## My document locator

**Record where your original documents are stored.**

Click on the 'My document locator' button.

The 'My document locator' button advises you which documents you will need to collect and protect.

The 'My document locator' lets you record where your original documents will be stored if you choose not to keep digital copies on your data-key.



## My emergency/medical

**Quick access to your medical files in case of emergency!** Click on the **'My emergency/medical'** button.

The **'My emergency/medical'** button links directly to your health, medical and primary contact details in case of an emergency.

Your trusted person can use this button to quickly access your critical information in an emergency.

## Print this Form or Folder

You can print out copies of any section or form as required.

## Return home

**Click to return to the home screen**

This takes you back to the **home screen** to change the user, add a new user or delete a user.

All form data that you have entered is **saved automatically** before the application goes to the Home Screen.

## Important!

If you store your important physical documents somewhere separate to this data-key, you should provide exact details of where they are stored here, for your trusted person to find them when/if needed on the My Document Locator. Preferably, you will store these physical original documents safely and all together if possible.

## Quit

**Click to quit out of the application**

This **quits** out of the LifeBank application.

All form data entered is **saved automatically** before quitting.

## Time out feature

For your added protection, the application will automatically close down if not used for more than 10 minutes.

When there has been no activity (no clicks or typing) for 10 minutes, the app will display an alert message and a 'Continue' button.

If the user clicks continue the alert closes and app resumes. If you do not click continue, your LifeBank will shut down.

## Relaunching LifeBank

Whenever you relaunch your LifeBank, you will be presented with this screen.

Here you can add new users, manage your privacy controls and reset your password, before proceeding into the main application.

You will be invited to set privacy controls on your data-key. On your first relaunch, you should choose 'No' (so you can see everything on your data-key).

On subsequent launches however, you may opt to click 'Yes' to deny access to certain sections. Click proceed.

## If you select 'Yes. Deny access to some content'

You can select any section here that you wish to disable during your next session. These 'denied' sections will become visible again by quitting and restarting LifeBank after entering your password.

## Forgotten your password?

Don't fear, you reset it here whenever you relaunch the data-key.

Click the Reset password button.

The app will generate a new random password, and also send an email to your registered email address (as provided)

A confirmation window will be displayed.

You will need to enter in this emailed password into the app. You will then be able to change it to something you choose from the start/home screen once you have logged in.

## Changing your password

If you wish to change your password, you will need to enter your original password in first. This is to stop unauthorised parties from changing your password without your consent.

## Adding new users

After the Home Screen opens, go to the panel at the bottom of the screen and select **add new user** to enter in new user(s) name in the window. You will need to select **your name** every time you use the LifeBank data-key.

You can add/delete as many user names as you choose. Each name will open up a separate fully functioning user file in the application.

After entering your full name, click 'Start'. The **Main Menu** will now open.

## Resetting Password

### Reset your password

If you have forgotten your password, you can reset it here. An email be sent to your registered email address with a new password.

1. Click the **Reset Password** button,
2. Await your email with a new password,
3. Enter the provided password into the '**Please enter your password**' field.
4. On the next screen, change the password to your own
5. Alert your Trusted Person of the new password

CANCEL

NEXT

- Yes. I want to hide content
- No. I do not want to hide content

QUIT

RESET PASSWORD

## Sharing

You may make some or all of the LifeBank forms or a Folder available to a third party - or yourself, say, to a mobile device - for a period of time which you nominate when setting up the sharing facility.

If you share a form with a third party they may make changes to the data and the next time the LifeBank Application is run from a computer with a live internet connection the forms on your data-key will be updated with the changes.

If you disconnect from the internet and then make changes to the form data on your data- key the copy on the server will not be updated until the next time a live internet connection is available.

### Important

Normally we do not store any of our customers data online, however in order to provide this functionality the data contained in shared forms must be uploaded to the LifeBank Server. It is then retained for as long as the access has been granted to the external user. When the access expires the data is deleted.

LifeBank make every effort to ensure the security of your data while it is on our server but no company can guarantee their systems are un-hackable.

## Creating an external user

Click **add user**, fill out the requested details and check the box(es) next to the form(s) you wish to share. The external user will be notified by email.

## Removing an external user

Click the **X** icon next to the external user's name on the external user page to terminate their access immediately.

## External Users


+ ADD USER

### Daniel Jackson

Expires At: 04/12/2016

Allowed forms count: 2

email: dan.jackson@yopmail.com

Is Active: 

Access url:

<http://lifebank.stageserver.org/external/3ffe2296-86ce-4b6e-90a8-4c7a0d9e33f4>



Jonas Quinn

Follow this link to get access

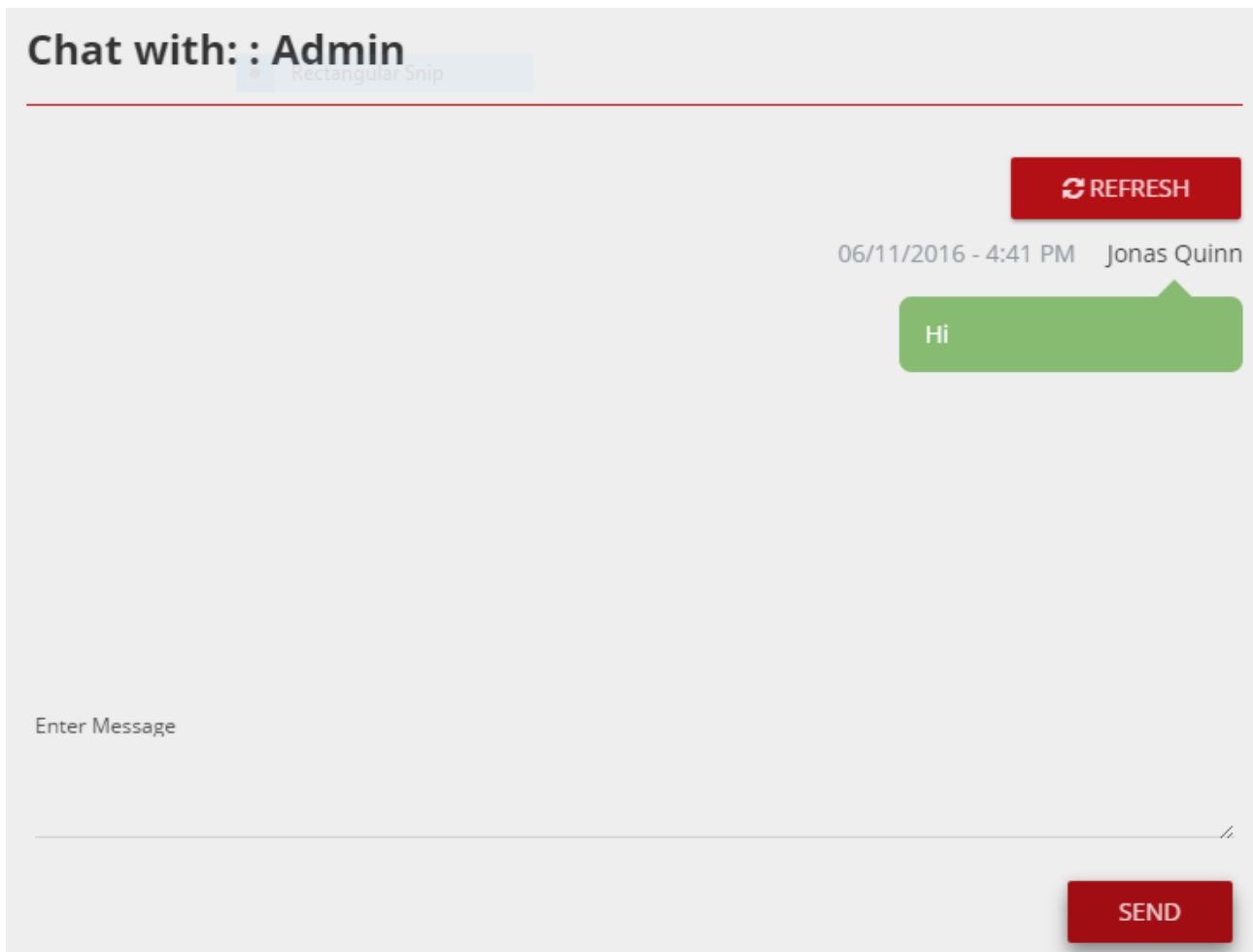
Get Access

LifeBank - 11/04/2016

## Messages

You may send and receive messages from your external users and your account administrator. These individuals are listed on the **Message** page.

Click a persons name to start a chat. The external user may use the **messages** button at the access url to read your messages and make their own replies.



If you have had a chat open for some time you may need to click **refresh** to get the most recent messages.

## Remove the data-key and store it when not in use

We advise you to remove your LifeBank data-key from the USB drive whenever you are not using it and store it in the container provided, in the safe place that you have nominated.

This will prevent the data-key from physical damage and unwanted exposure to others (who may accidentally or intentionally view its contents).

## Review LifeBank and update regularly

Review and update your LifeBank file at least twice a year, to ensure that all details are current and correct.

## Avoid unwanted exposure to your data-key data

For your security, your data-key was designed to avoid any internet or cloud exposure to your data.

Except for when you are initially activating the data-key at launch or using the trusted person email notification and/or My Usage Report; the data-key will not need any access to the internet

There is however, for your convenience, a hot-link to the LifeBank webpage when you click on the

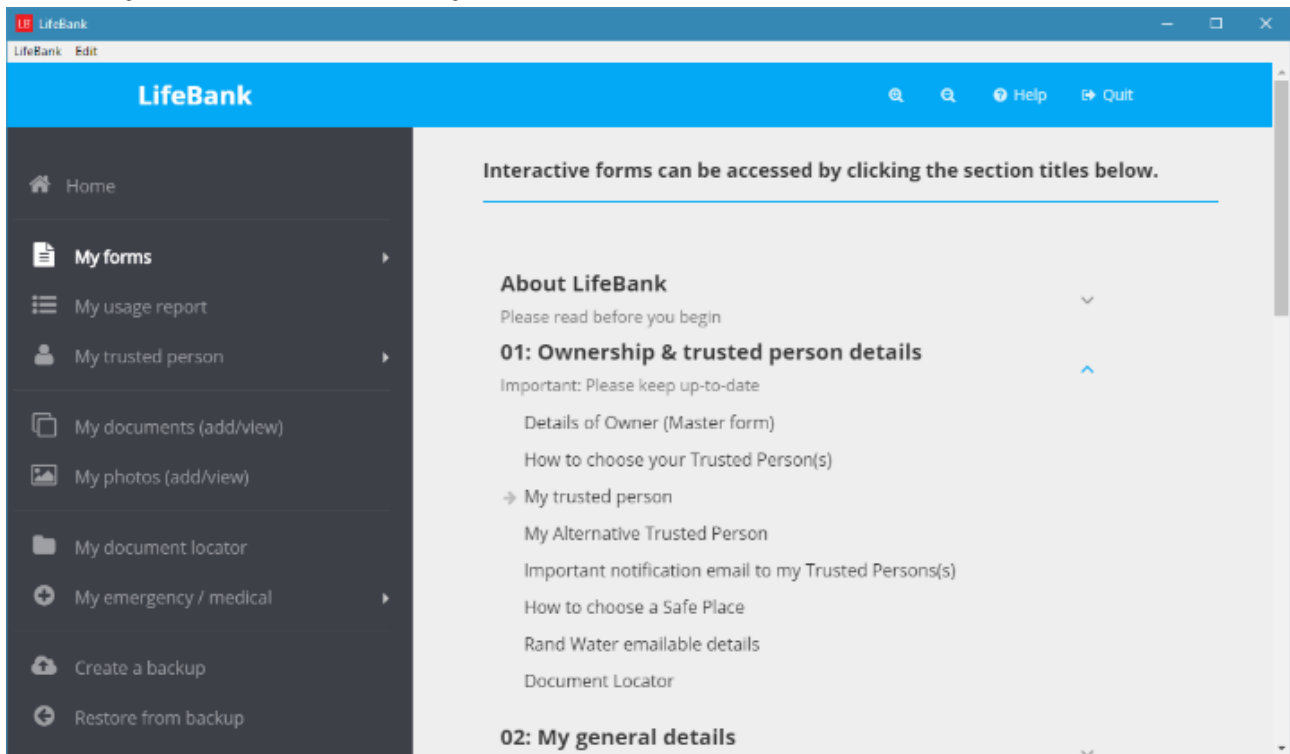
LifeBank logo at the bottom of the side-bar menu (if you are connected). This hot-link will take you directly to the LifeBank webpage if needed.

For additional online security (especially in public places such as airports etc.) it may also be advisable to disconnect your computer from the internet when using your LifeBank data-key.

**Choose a 'Safe place' for your LifeBank data-key Review the information sheet/guide as to how to identify a 'Safe place' where you can store your LifeBank data-key.**

Ideally, you would ensure the safe place you select is ideally secure from fire, flood, magnetic fields, accidental observation and theft. Consider also seeking appropriate professional advice to ensure that the safe place

meets your required safety criteria.



Older information that is no longer valid should be updated or deleted where necessary.

## Contact your trusted person as soon as possible to discuss

- What LifeBank is.
- What your trusted person's responsibility for LifeBank will be.
- Ensure that your trusted person agrees to take on the responsibility for LifeBank.
- Where your LifeBank safe place is so it can be found if required.
- Details of the data-key and your computer passwords; and the location of any keys necessary to access LifeBank.
- Discuss how you want them to deal with the data-key if/when needed.
- The pro-forma email/letter, print it off, or email it to your nominated trusted person(s).



## Completion

You have now secured your most important data and documentation and made it selectively available to your trusted person to access it if/when needed.

For any other questions, please email: [info@lifebanksystems.com](mailto:info@lifebanksystems.com)

## System requirements

### Mac

- Mac OS 10.4 or higher • 1 GB ram.
- USB 2.0 / 3.0
- 333MHz processor

### PC

- Windows XP, Vista, 7 or higher • 1 GB ram.
- USB 2.0 / 3.0
- 333MHz processor

### Linux

LifeBank does not support use of the Application on Linux or Unix systems however the Application is known to work on Ubuntu 14.04 and 16.04.

You may need to adjust the permission settings on the USB directory when the data-key is mounted (`chmod 777`).

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## Contact us

If there's anything further you would like to know about LifeBank, please contact us at: [info@lifebanksystems.com](mailto:info@lifebanksystems.com) © MyPersonalDocs Pty Ltd Copyright 2011–13 with myessentials and LifeBank solely owned MyPersonalDocs Pty Ltd.

