What is Codebook

Encrypted Data Vault

Guards passwords and private data

Keeps sensitive information organized

Enables quick recall of secrets

Syncs data across multiple devices

- iOS (iPhone / iPad)
- Android
- Windows
- Mac OS X
Security

256-bit AES encryption

Peer-reviewed storage engine

Protection:

- Data at rest on device
- Data at rest on cloud sync service (Google Drive or Dropbox)
Getting Started
Master Password

Choose Master Password on first use

Enter each time to access vault

All encryption uses a derived key

Can be any length but we recommend a password of at least 8 characters including 1 of each, capital, number, lowercase, and special character, ex: ! $ ?

Complex and difficult to guess

All instances that sync must have the same password

Don’t forget - no recovery
Welcome

1. Navigation Menu
2. Favorites List
3. Recents List
4. Category List
5. Search
6. Settings
7. Synchronization
Data model

Category

- Groups records
- Navigation-based retrieval

Entry

- Record with multiple fields; or
- A multi-line note
Data model

Fields

- Store related data on an entry
  - e.g. username, password

Labels

- Define the Field type
- Establish behavior (e.g. launch email, generate password)
Create a Category

1. New Category
2. Enter Descriptive Name
3. Choose Icon
4. Save
Create an Entry

1. Add Entry (plus symbol)
2. Create Entry
3. Enter Descriptive Name (next slide)
4. Choose Icon (next slide)
5. Add Fields (next slide)
   a. Choose Label
   b. Enter field value
6. Click the “Favorite Star” to mark the most important record (next slide)
7. Save entry (next slide)
Create an Entry (continued)

1. Add Entry (previous slide)
2. Create Entry (previous slide)
3. Enter Descriptive Name
4. Choose Icon
5. Add Fields
   a. Choose Label
   b. Enter field value
   c. Done
6. Tap the “Favorite Star” to mark the most important record
7. Save entry
Special Labels & Behaviors

● Password / PIN
  ○ Masked
  ○ Supports random generation

● Note
  ○ Free text entry

● Website
  ○ Launches browser on double click

● Email
  ○ Launches email client on double click

● TOTP
  ○ Generates time-based one time passwords (e.g. for Google 2-step)
Create a Note

1. Add Note (plus symbol)
2. Create Note
3. First line becomes title (next slide)
4. Multi line text content (next slide)
5. Done -- save note (next slide)
Create a Note (continued)

1. Add Note Entry (previous slide)
2. Create Note (previous slide)
3. First line becomes title
4. Multi line text content
5. Done -- save note

Welcome to Codebook!

This is a note, feel free to delete it, edit it, or make new ones. We'd like to introduce ourselves and mention a few things:

* Notes are for free-form data; if you're the type who needs more structure have a look at the Passwords category. We've added a sample entry record there that you can fill out, copy, reuse, or delete. It's merely to show off what you can do. Entry records can contain any number and kind of fields and be structured however you like. Go nuts!

* On entry records, you store your information in fields. Each field has a label that's used to describe the data and provide corresponding behaviors. Adjust your labels however you like in Settings -> Customize Labels.

* We've all got issues—tell us about yours! support@zetetic.net
Deleting categories

1. In the Categories View long tap a category to delete
2. Tap delete category
3. Tap ‘Yes’ to confirm your deletion

Be careful not to lose information!

*Deleting a category will delete all entries inside that category
Deleting entries

1. In the Entry view tap Edit
2. Tap Delete
3. Tap ‘Yes’ to confirm delete
4. Alternate delete method:
   a. Long tap entry within category list
   b. Select ‘Delete Entry’ from context menu
   c. Confirm deletion

Be careful not to lose information!
Deleting fields (continued)

1. In the Entry view tap edit pencil
2. Tap the trashcan next to the field to be deleted
3. Tap Delete (next slide)
4. Tap save icon (next slide)

Be careful not to lose information!
Deleting fields (continued)

1. In the Entry view tap edit pencil (previous slide)
2. Tap the trashcan next to the field to be deleted (previous slide)
3. Tap ‘Yes’ to confirm deleting the field
4. Tap save icon

Be careful not to lose information!
Navigation and Retrieval
Categories

Navigate through your own custom organization structure

1. Choose a Category from the Categories list
2. Choose an Entry

Categories and Entries are sorted alphabetically
Favorites

Entries marked with the Favorite star are quickly accessible

1. Tap “Favorites” from the side navigation menu
2. Choose Entry
3. To un-favorite an entry from the favorite view:
   a. Tap star to un-favorite, will display gray star outline
Recents

Quick retrieval of the 20 Entries most recently accessed

1. Choose a Category from the side navigation menu
2. Choose Entry
3. Tap trashcan to clear recents list

Recently viewed entries are automatically added to the top of the list
Search

Quick retrieval of information based on keyword. Matching favorite results are populated to the top of the result list.

1. Enter search criteria
2. Choose an Entry

Entry names and all field values are included in search (in this search example, the 401k entry has the secret question value of “What was your first pet’s name?” which contains the search criteria “am”)
Copy / Paste

Data can be copied to the clipboard

1. Long Tap on a field
2. Select Copy

Paste into other applications

Clipboard is managed and cleared automatically
Synchronization
Synchronization

Codebook can keep data in sync across multiple devices.

Changes made on any device merge.

All data is encrypted on Google Drive.
Synchronization

Codebook can keep data in sync across multiple devices

Changes made on any device merge

All data is encrypted on Dropbox
Sync modes

1. Sync: bi-directional merge
2. Overwrite: Replaces remote data
3. Restore: Overwrite local changes

Use “Sync” mode periodically to keep your data up to date

Use “Overwrite” mode after a password change

Use “Restore” mode to initialize a database on a brand new device
Sync modes

- **Sync**: bi-directional merge
- **Overwrite**: Replaces remote data
- **Restore**: Overwrite local changes

Use “Sync” mode periodically to keep your data up to date.

Use “Restore” mode to initialize a database on a brand new device.
How to Sync

1. Tap the Sync menu item in the side navigation
2. Select the appropriate sync operation.
3. Link to Google Drive
4. Tap Start Sync
How to Sync

1. Tap the Sync menu item in the side navigation
2. Select the appropriate sync operation.
3. Link to Dropbox
4. Tap Start Sync
Desktop WIFI Sync for Android

1. After enabling the WIFI sync option on the desktop app, go to the Sync tab on the Android device and set the Operation to Sync and the Mode to Desktop WIFI.

2. Tap the computer setting to browse the local network for your computer name and then tap it.

3. Tap the computer name on the Local Network screen to link it to the device so the sync can be performed.
4. This will enable the start sync button which you can tap to begin the sync process.
Sync example

Computer

1. User add a new entry in Codebook Desktop
2. Initiate Synchronization
3. Changes copied to Google Drive or Dropbox

Mobile

4. Initiate Synchronization
5. Desktop changes merged from Drive to Codebook Mobile
6. Edit Entries on Codebook Mobile
7. Initiate Synchronization
8. Mobile changes copied to Google Drive or Dropbox

9. Initiate Synchronization
10. Mobile changes merged from Google Drive or Dropbox to Codebook Desktop
Important Preferences
Accessing Settings

1. Tap Settings in the side navigation menu
Customize Labels

Add new custom labels

Customize behaviors

Enable masking

1. Settings
2. Customize Labels
3. Select existing or add new Label
4. Edit Label
5. Save
Autolock

Leaves application unlocked for a designated period of time (default 1 minute)

Automatically locks application when timer expires

Allows more convenient access without repetitious logins

Tip: Be careful, when autolock is enabled

1. Settings
2. Preferences
3. Use Timer, Lock after
Other Features
Password change

1. Settings
2. Change Password
3. Enter current password and new password

Password change *must* be completed simultaneously on all devices if Sync is used

After password change, run a “Overwrite” sync operation to replace the replica