

# Codebook

Codebook for iPhone and iPad  
Introduction and Usage - Release 5.0

# What is Codebook

Encrypted Data Vault

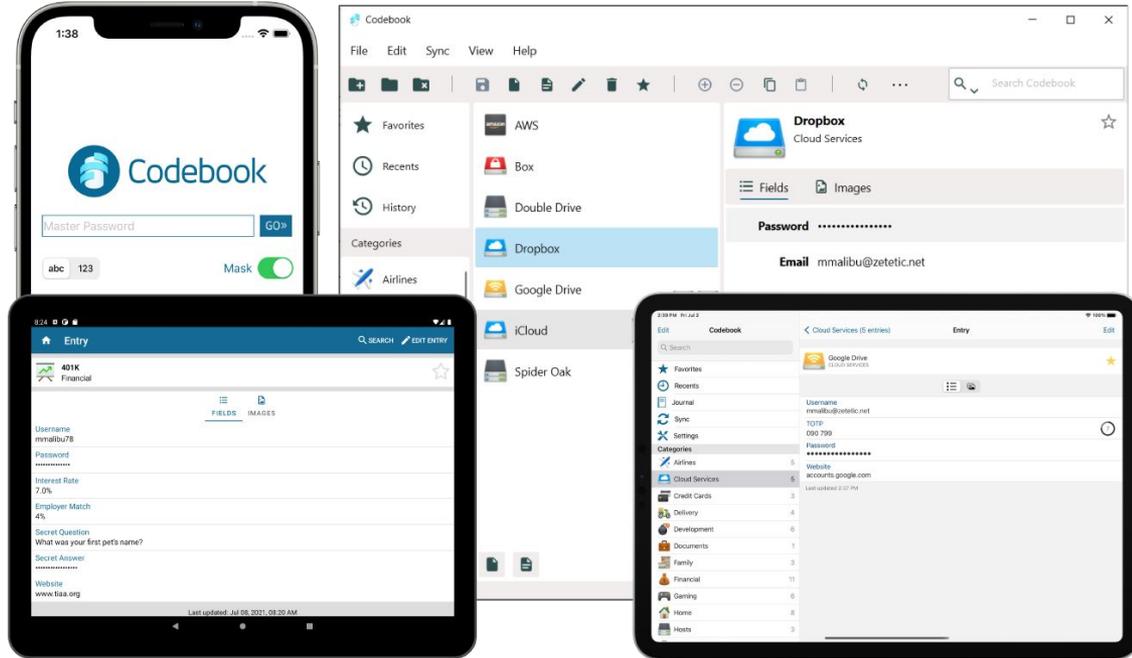
Guards passwords and private data

Keeps sensitive information organized

Enables quick recall of secrets

Syncs data across multiple devices automatically or on demand

- iOS (iPhone / iPad)
- Android
- Windows
- macOS



# Security

256-bit AES encryption

Peer-reviewed storage engine

Data Protection:

- Encrypted at rest on device
- Encrypted in transit during sync
- Encrypted at rest on all cloud services



Data encrypted with your Sync Key  
and Master Password

# Getting Started

# Master Password

Setup your Master Password on first use

It's required each time you access your Codebook data.

Your Master Password is used to encrypt your data on your device. It is not stored in Codebook.

Recommendations:

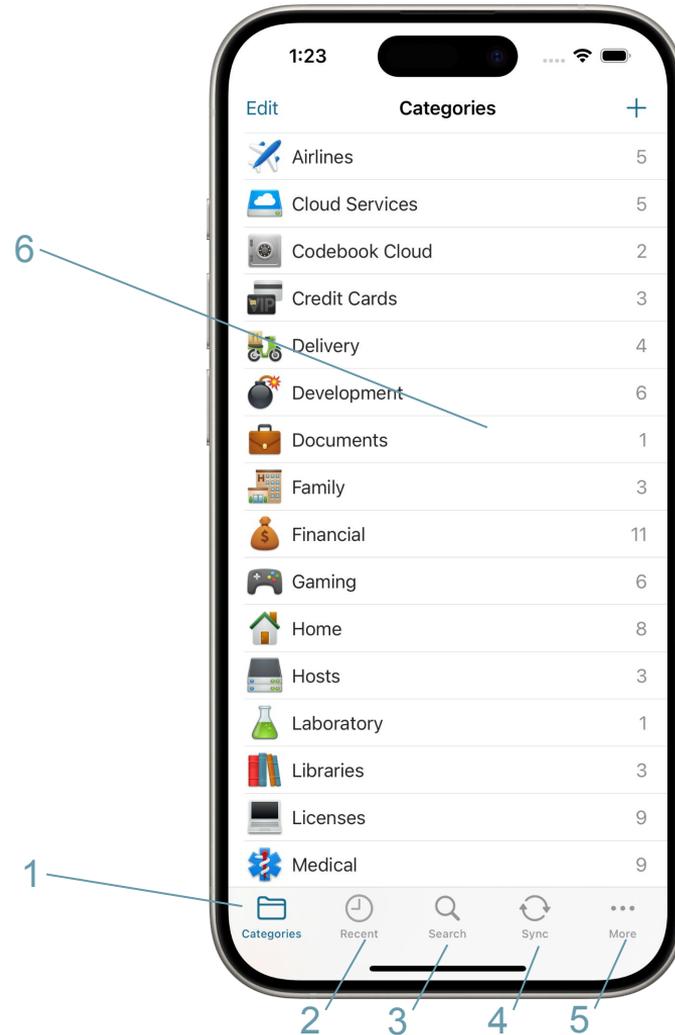
- at least 8 characters including 1 of each, capital, number, lowercase, and special character, ex: ! \$ ?
- Complex and difficult to guess

\*\*\* You must remember your Master Password. It cannot be recreated outside of Codebook \*\*\*



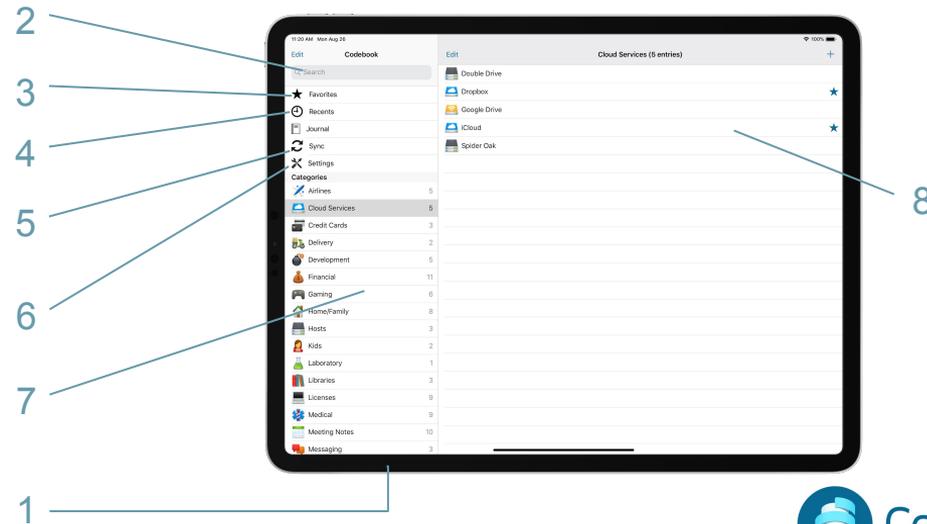
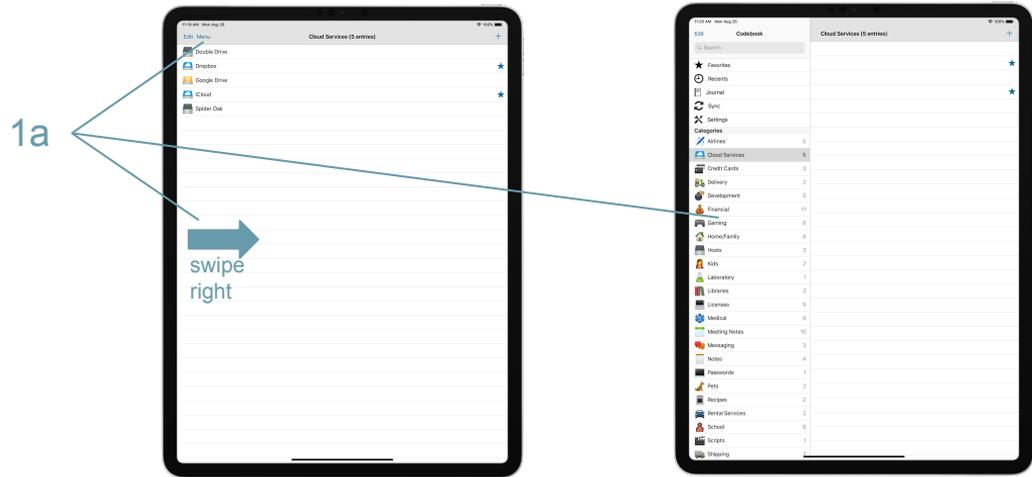
# Welcome

1. Navigation Tab Bar
2. Recents
3. Search
4. Sync
5. More (Favorites, Settings, Journal)
6. Category List



# Welcome - iPad

1. Side Navigation Pane
  - a. In portrait mode swipe right or tap the Menu button to overlay the Side Navigation Pane
2. Search
3. Favorites
4. Recents
5. Sync
6. Settings
7. Category List
8. Entry List



# Data model

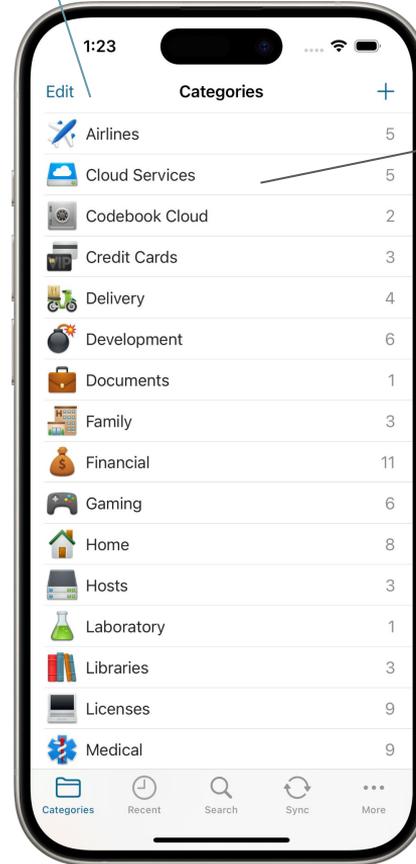
## Category

- Groups records
- Navigation-based retrieval

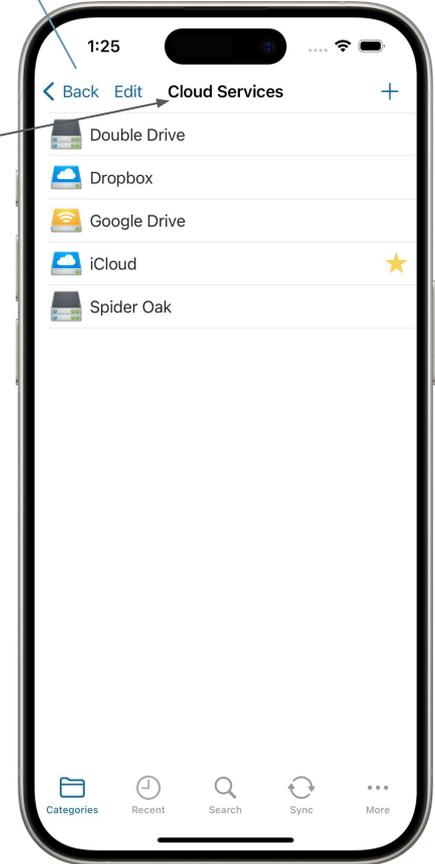
## Entry

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

Category List



Entry List



# Data model

## Fields

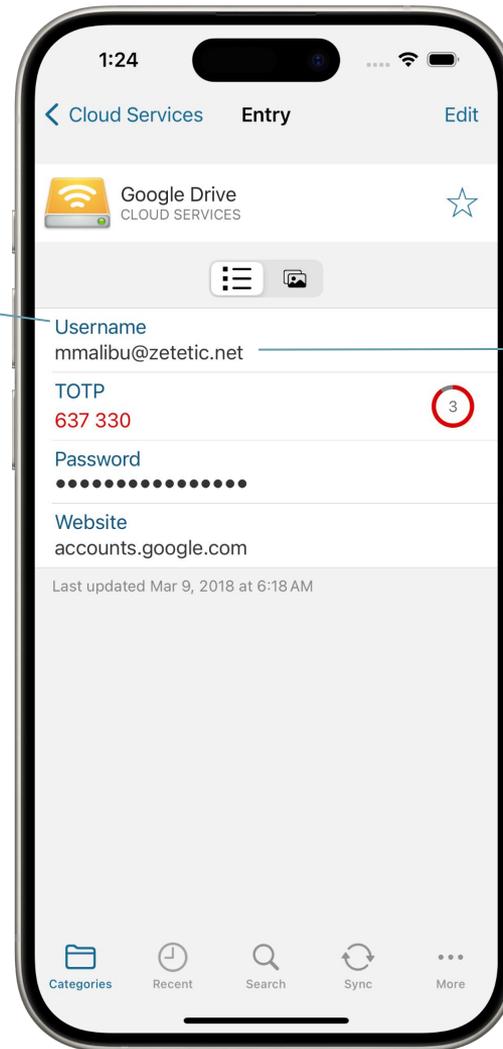
- Store related data on an entry
- e.g. username, password

## Labels

- Define the Field type
- Establish behavior (e.g. launch email, mask password)

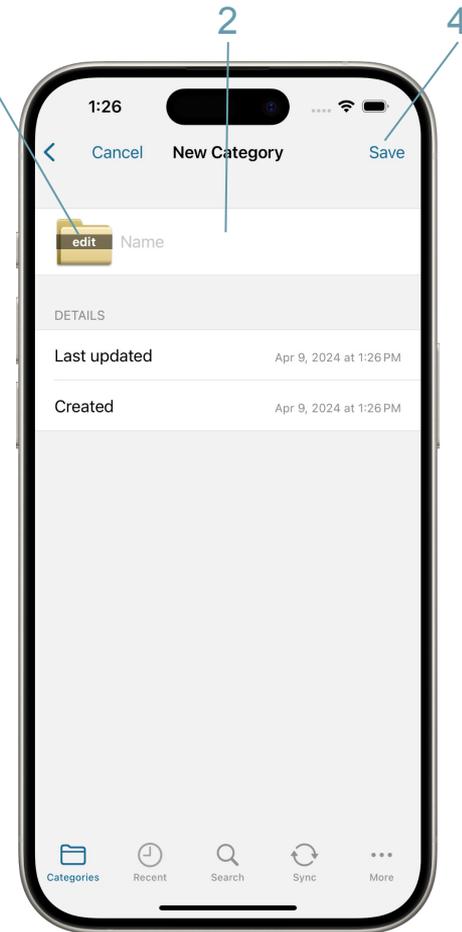
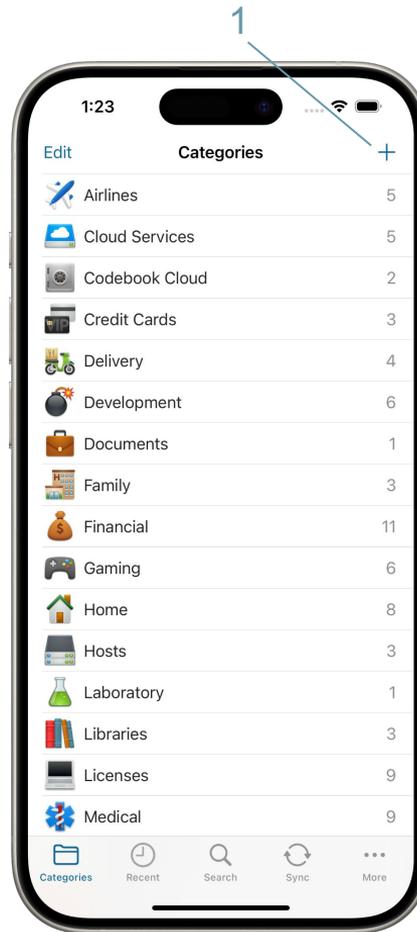
Label

Field



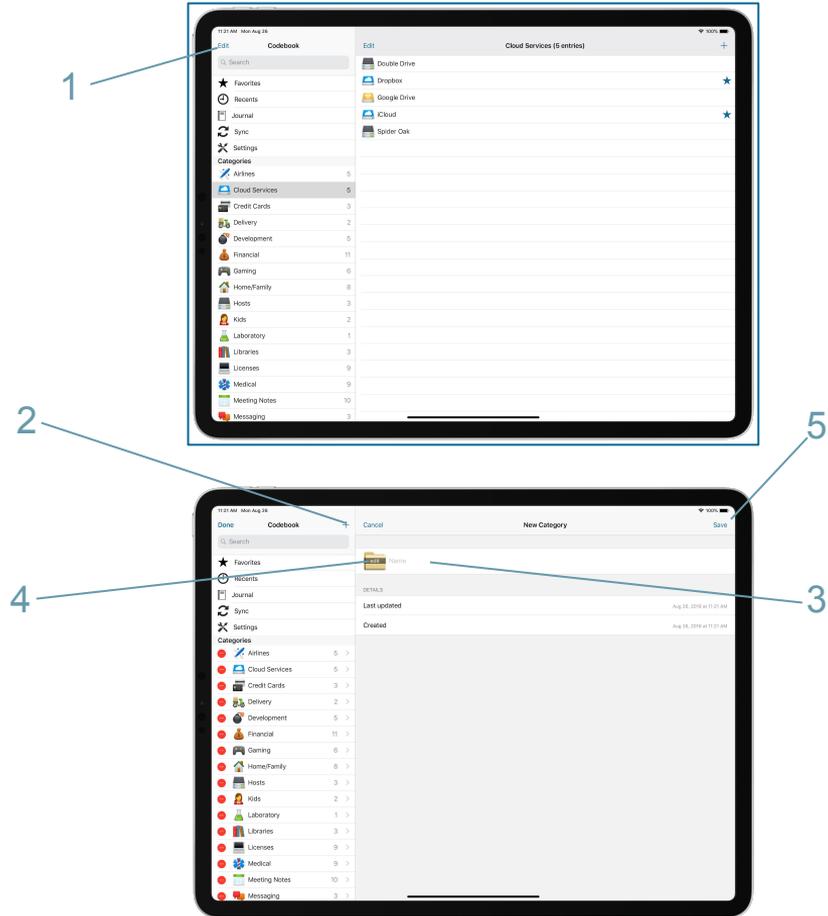
# Create a Category

1. Add Category (plus symbol)
2. Enter Descriptive Name
3. Choose Icon
4. Save



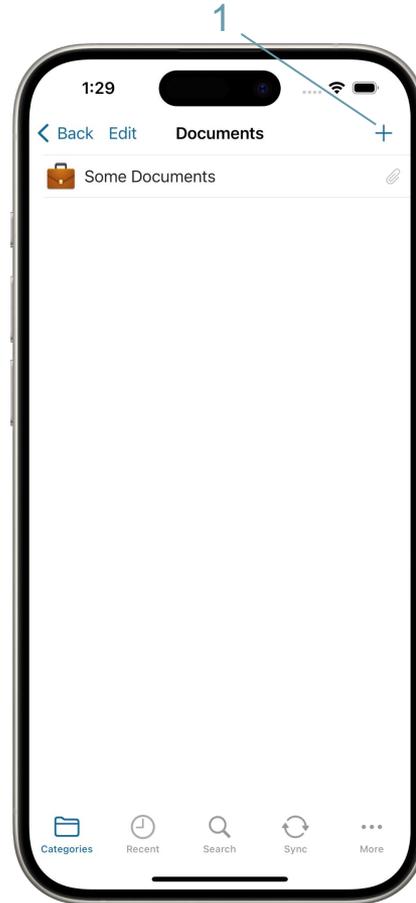
# Create a Category - iPad

1. In the Side Navigation Pane tap Edit
2. Add Category (plus symbol)
3. Enter Descriptive Name
4. Choose Icon
5. Save

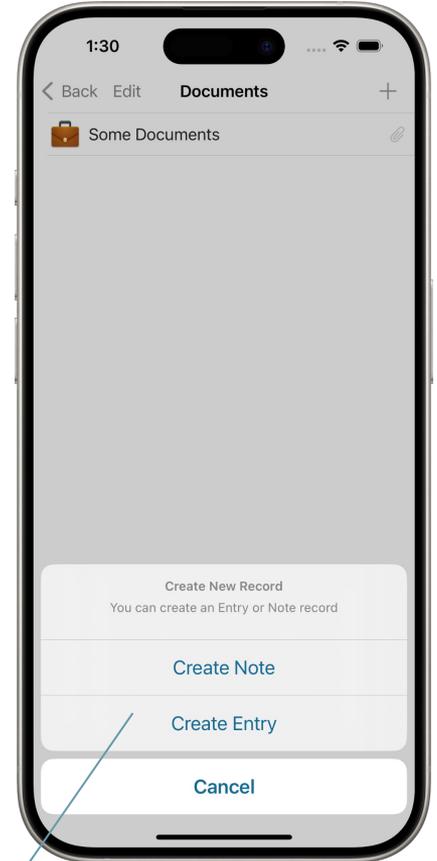


# Create an Entry

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. Tap the “Favorite Star” to mark the most important record (next slide)
7. Save entry (next slide)

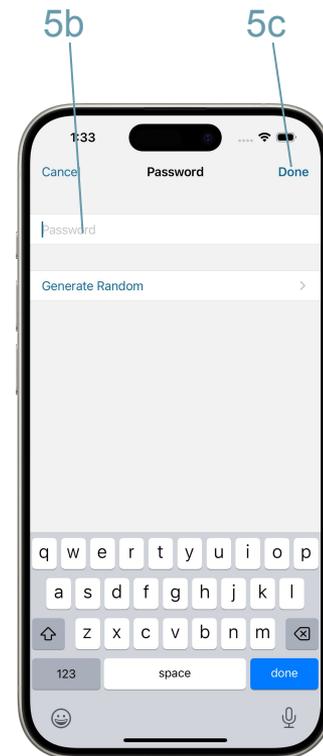
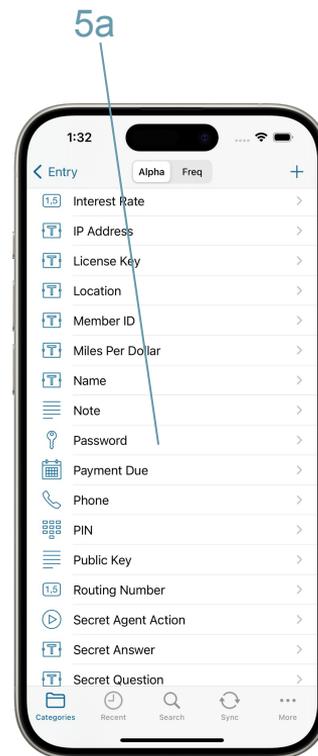
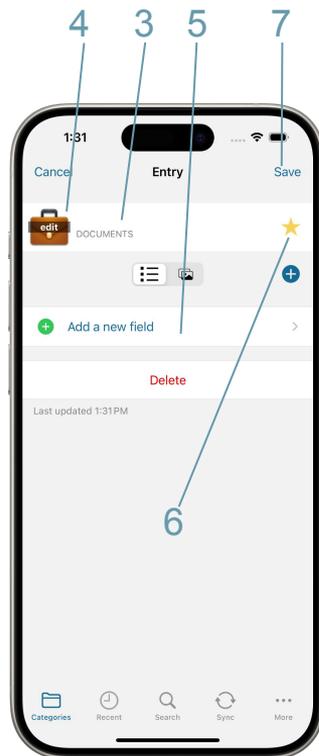


2



# 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 important entries
7. Save entry



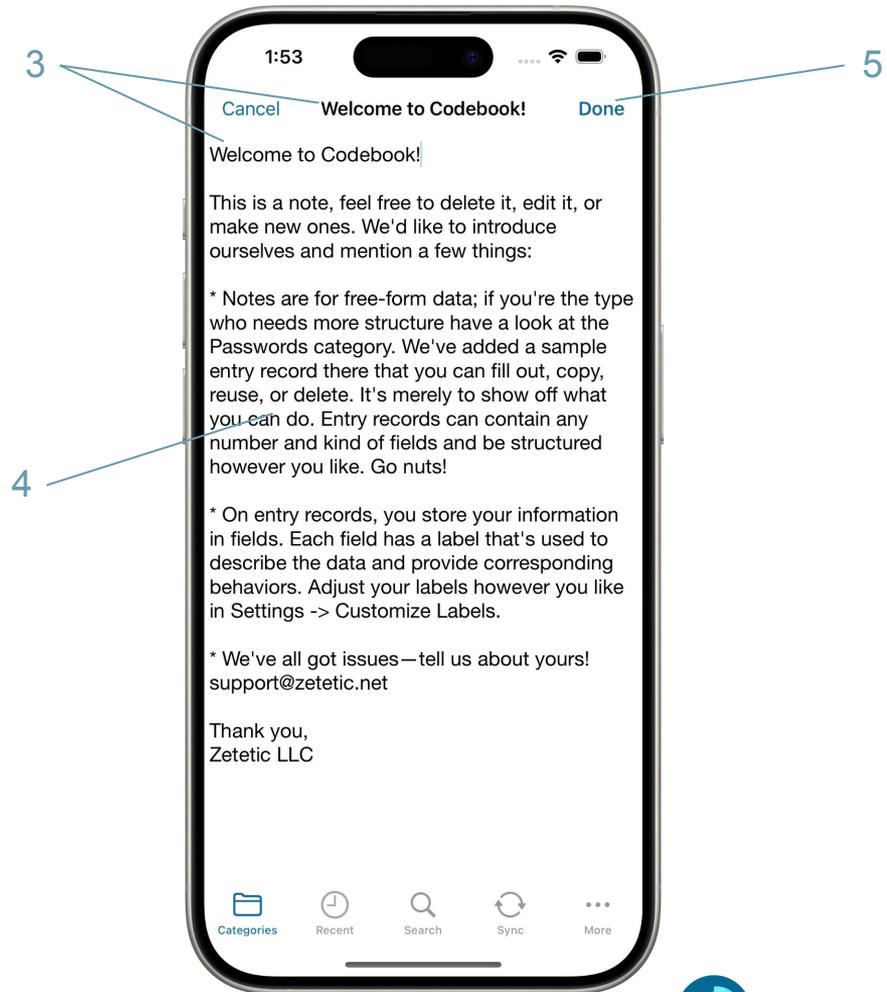
# Special Labels & Behaviors

- **Password / Pin**
  - Masked
  - Supports random generation
  - Weakness warnings are displayed when passwords are entered
- **Note**
  - Free text entry
- **Website**
  - Launches browser on tap
- **Email**
  - Launches email client on tap
- **Phone**
  - Can be used to make calls
- **2-Step Code**
  - Generates time-based one time passwords (e.g. for Google 2-step)
- **Date**
  - Ensures dates are valid

# Create a Note

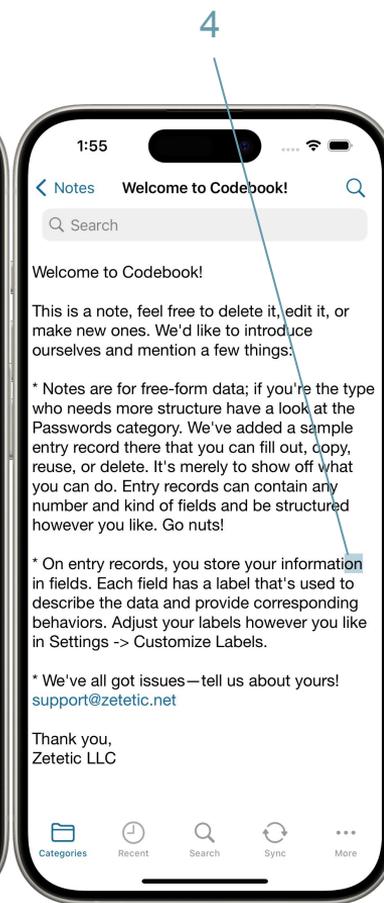
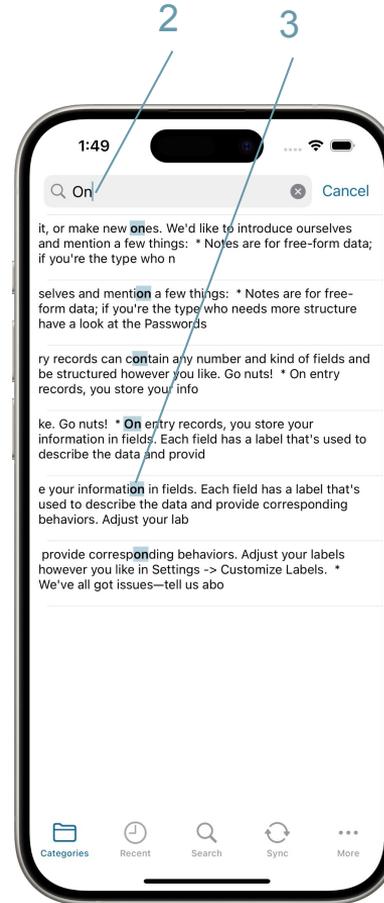
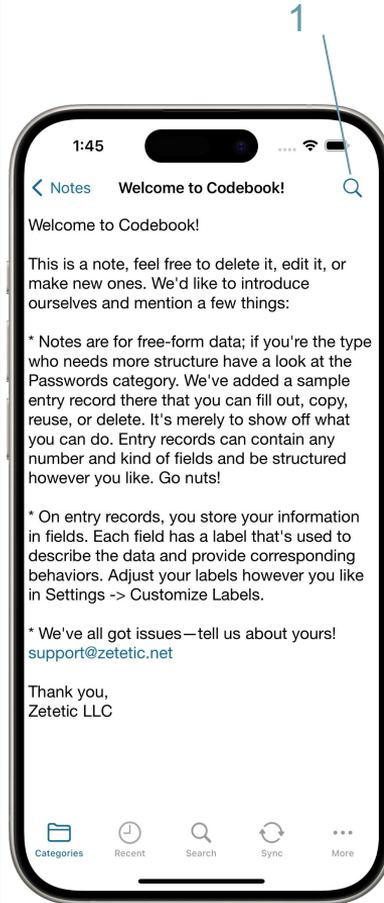
1. Add Note Entry \*\*
2. Create Note \*\*
3. First line becomes title
4. Multi line text content
5. Done -- save note

\*\* Steps on Create Entry



# Search Within a Note

1. Within a note view, tap the magnifying glass
2. Enter search criteria. The results will be displayed as you type. The matching terms will be highlighted and content around the result will also be displayed
3. Select a row from the results table
4. The note view will scroll to the location of the selected result, highlighting the found text

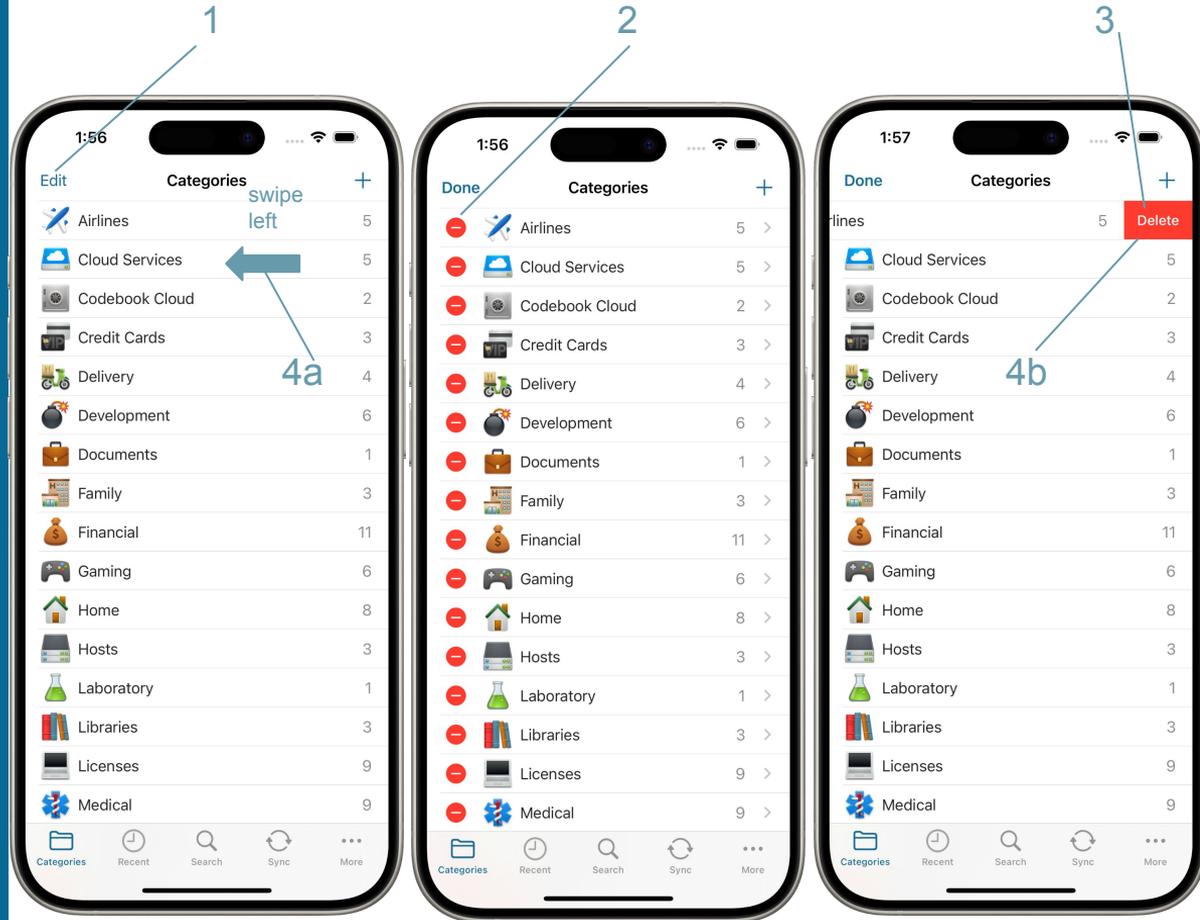


# Deleting Categories\*

1. In the Categories View tap Edit
2. Tap the minus symbol next the category to be deleted
3. Tap Delete
4. Alternate delete method:
  - a. Swipe left on the category row in the categories view
  - b. Tap Delete

Be careful not to lose information!

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

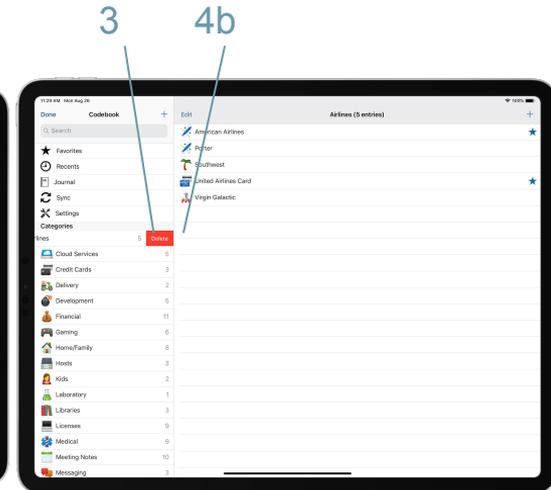
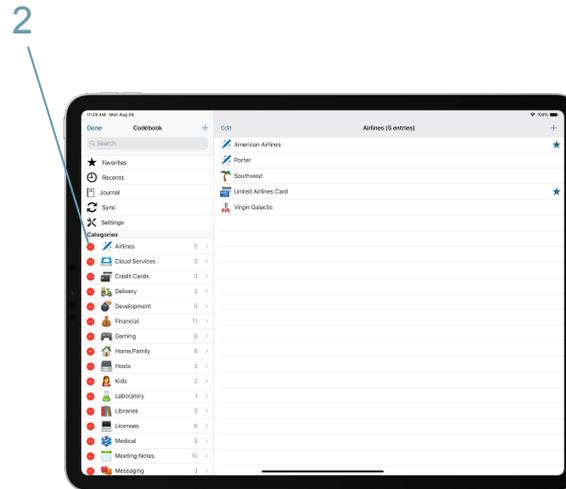
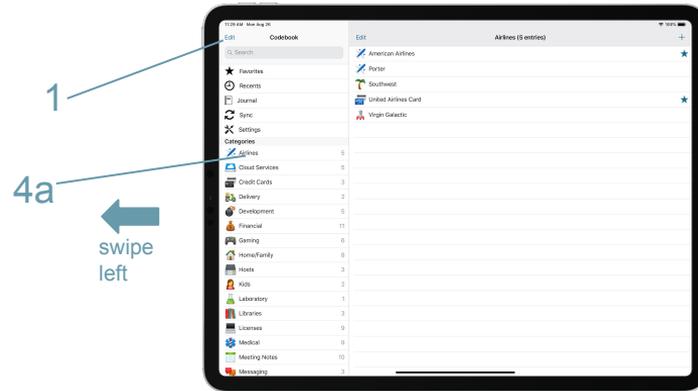


# Deleting Categories\* - iPad

1. In the Side Navigation Pane tap Edit
2. Tap the minus symbol next the category to be deleted
3. Tap Delete
4. Alternate delete method:
  - a. In the Side Navigation Pane swipe left on the category row
  - b. Tap Delete

Be careful not to lose information!

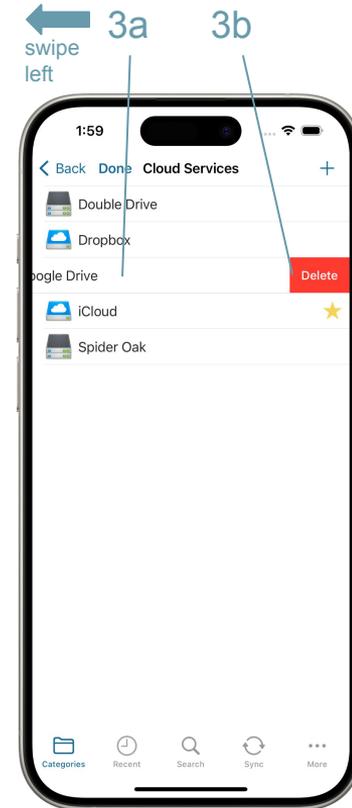
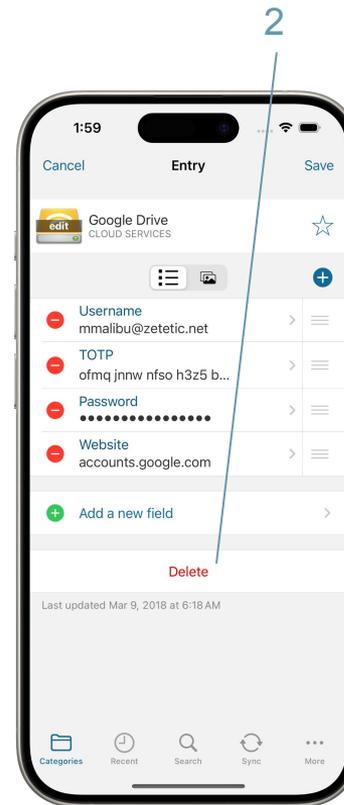
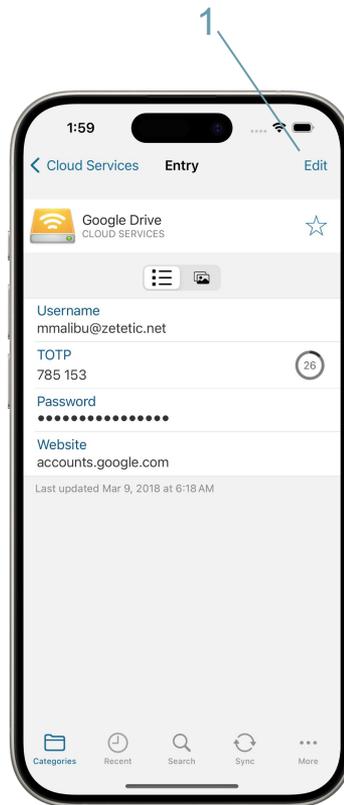
\*Deleting a category will delete all entries inside that category



# Deleting Entries

1. In the Entry view tap Edit
2. Tap Delete
3. Alternate delete method:
  - a. Swipe left on the entry row in the entries view
  - b. Tap Delete

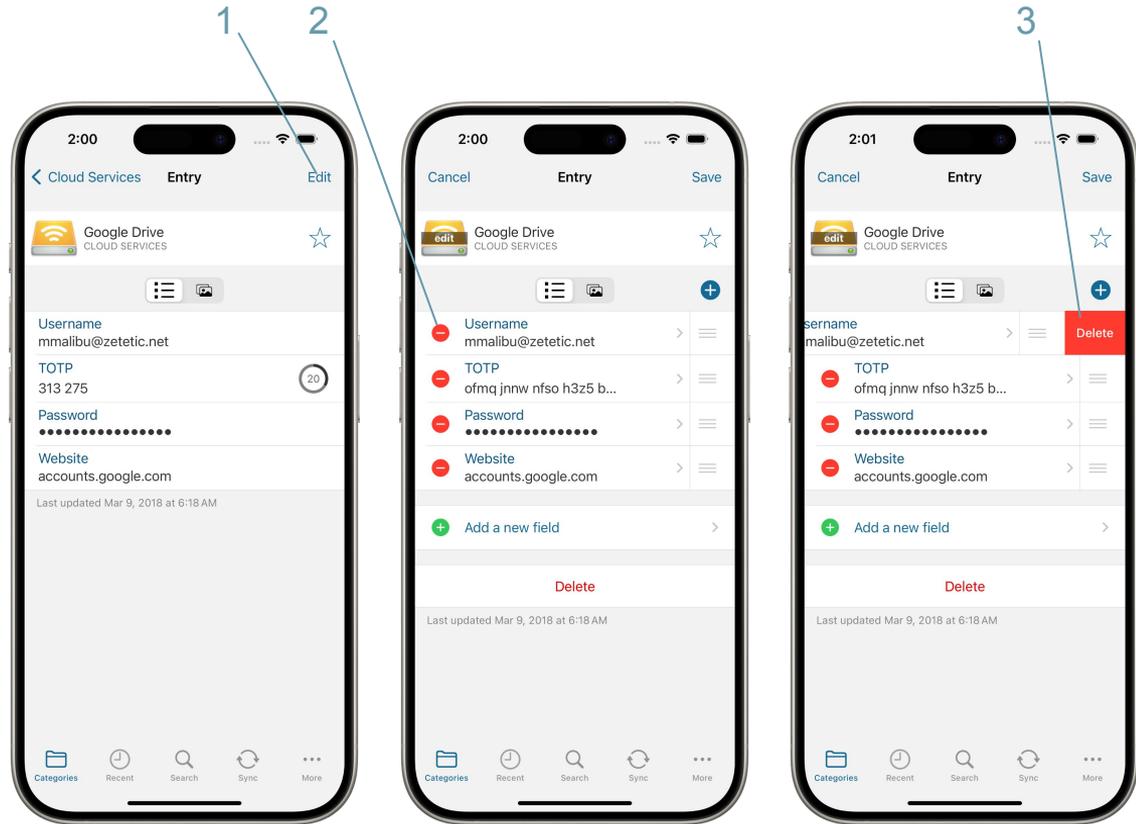
Be careful not to lose information!



# Deleting Fields

1. In the Entry view tap Edit
2. Tap the minus symbol next to the field to be deleted
3. Tap Delete

Be careful not to lose information!



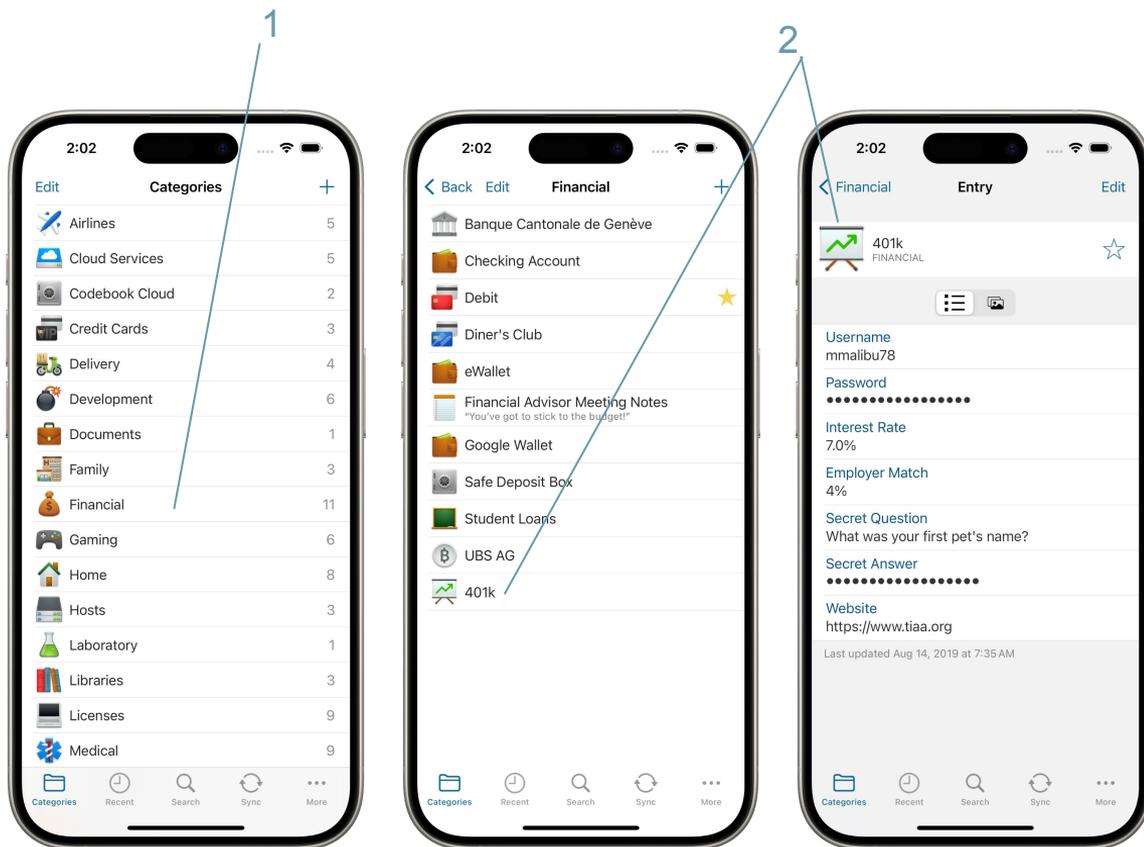
# Navigation and Retrieval

# 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



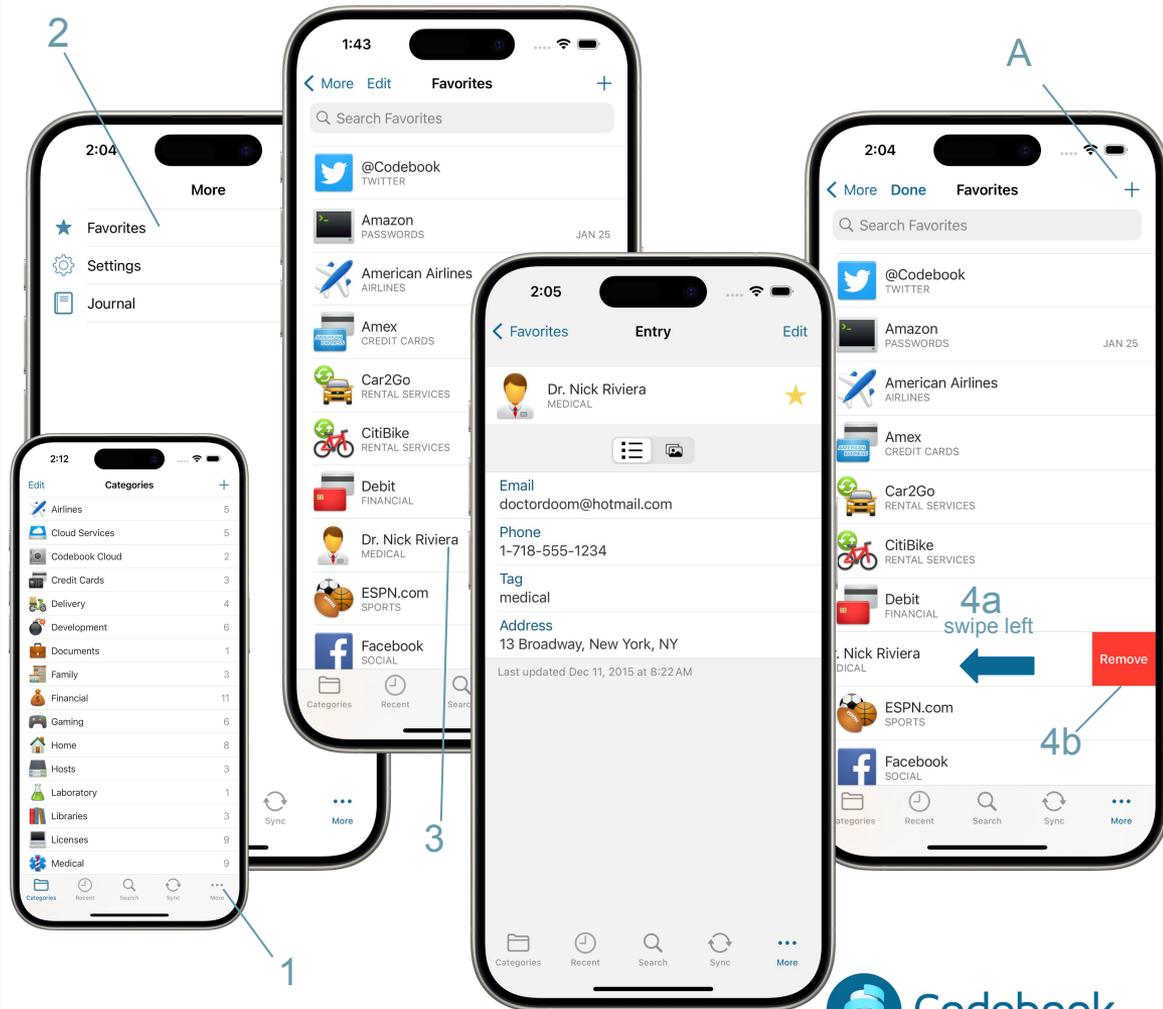
# Favorites

Entries marked with the Favorite star are quickly accessible

1. Tap “More” from the More the navigation area
2. Tap “Favorites”
3. Choose Entry
4. To un-favorite an entry from the favorite view:
  - a. Swipe left on the entry’s row
  - b. Tap Remove

To Add a Favorite from the Favorites View:

- A. Tap the ‘+’ symbol
- B. Entries that are not favorites will be displayed. Tap to select the Entry/ Entries you want to make favorites.
- C. Tap Done

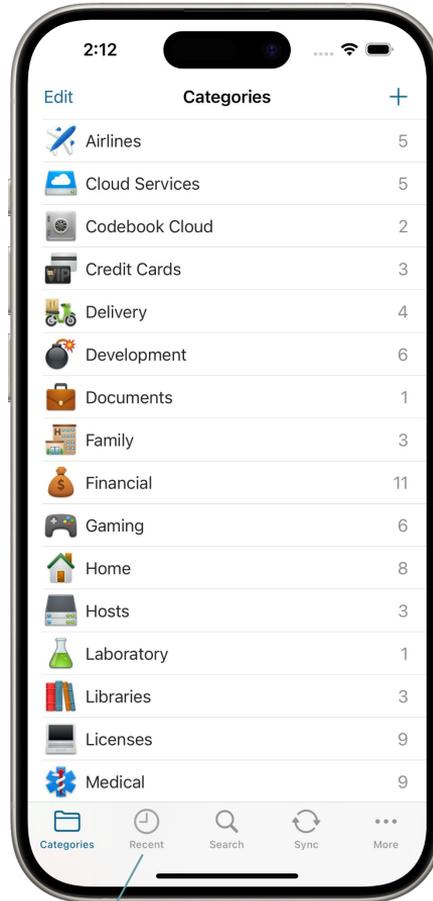


# Recents

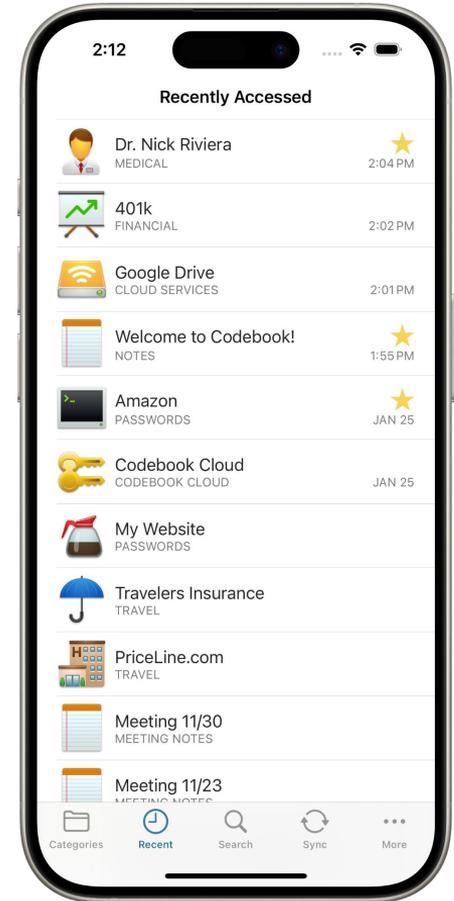
Quick retrieval of the 20 Entries most recently accessed

1. Choose "Recents" from the navigation area

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



1

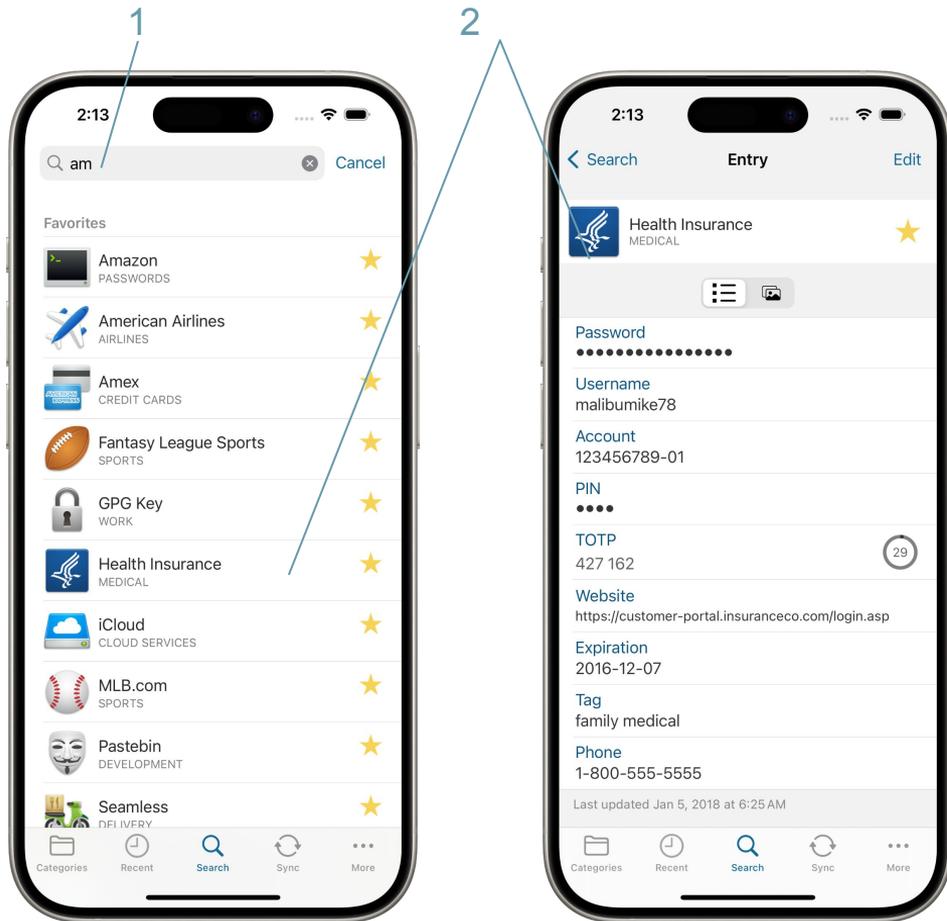


# Search

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 Health Insurance entry has the tag value of “family” which contains the search criteria “am”)



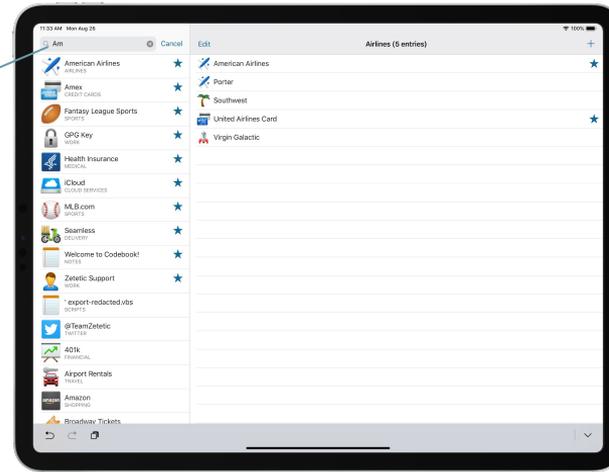
# Search - iPad

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

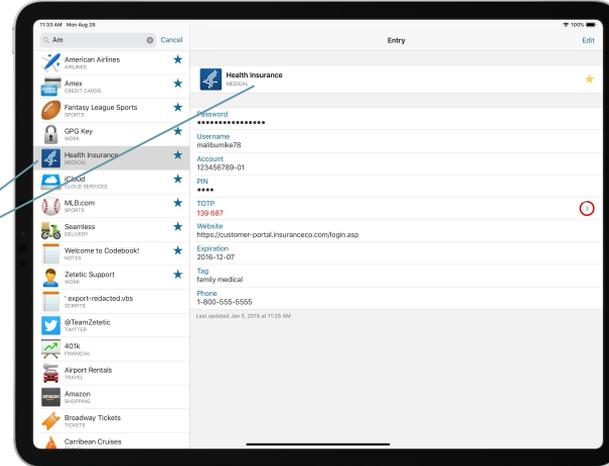
1. Enter search criteria
2. Choose an Entry

Entry names and all field values are included in search (in this search example the Health Insurance entry has the tag field value of “family” which contains the search criteria “am”)

1



2



# Copy / Paste

Two ways data can be copied to the clipboard

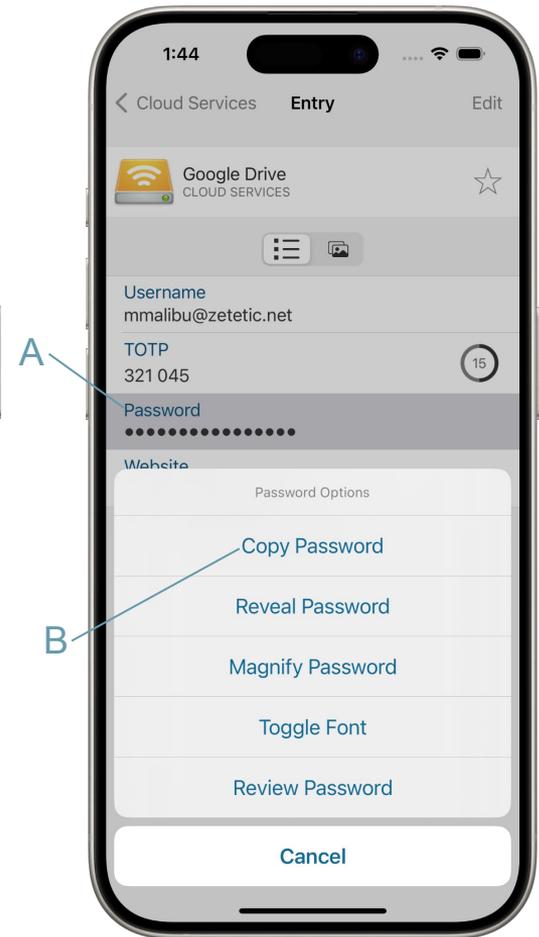
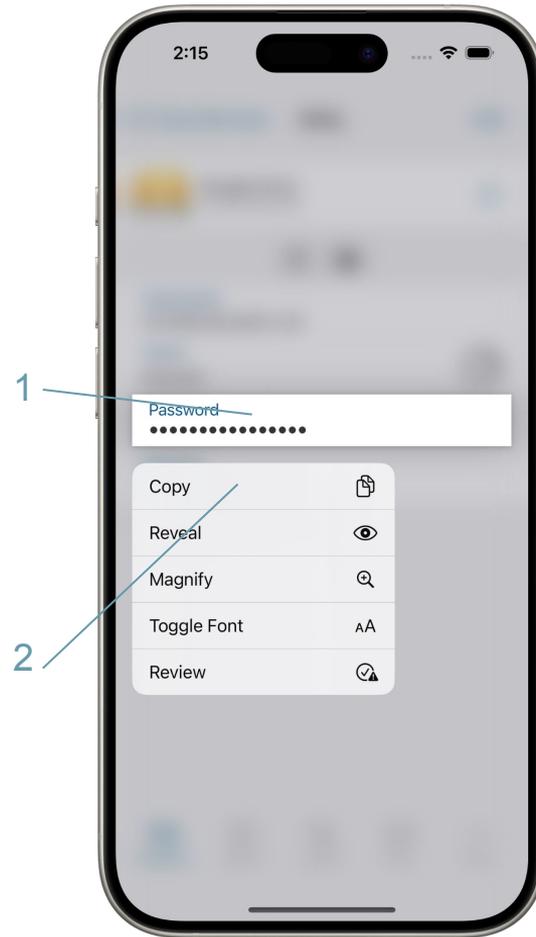
1. Long Tap on a field
2. Select Copy

Or

- A. Tap on field
- B. Select Copy from Action Sheet

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 can be merged.

All devices to be synced must share the same Sync Key. Your Sync Key is generated once and used for all of your devices.

You select the method to be used to sync your devices.

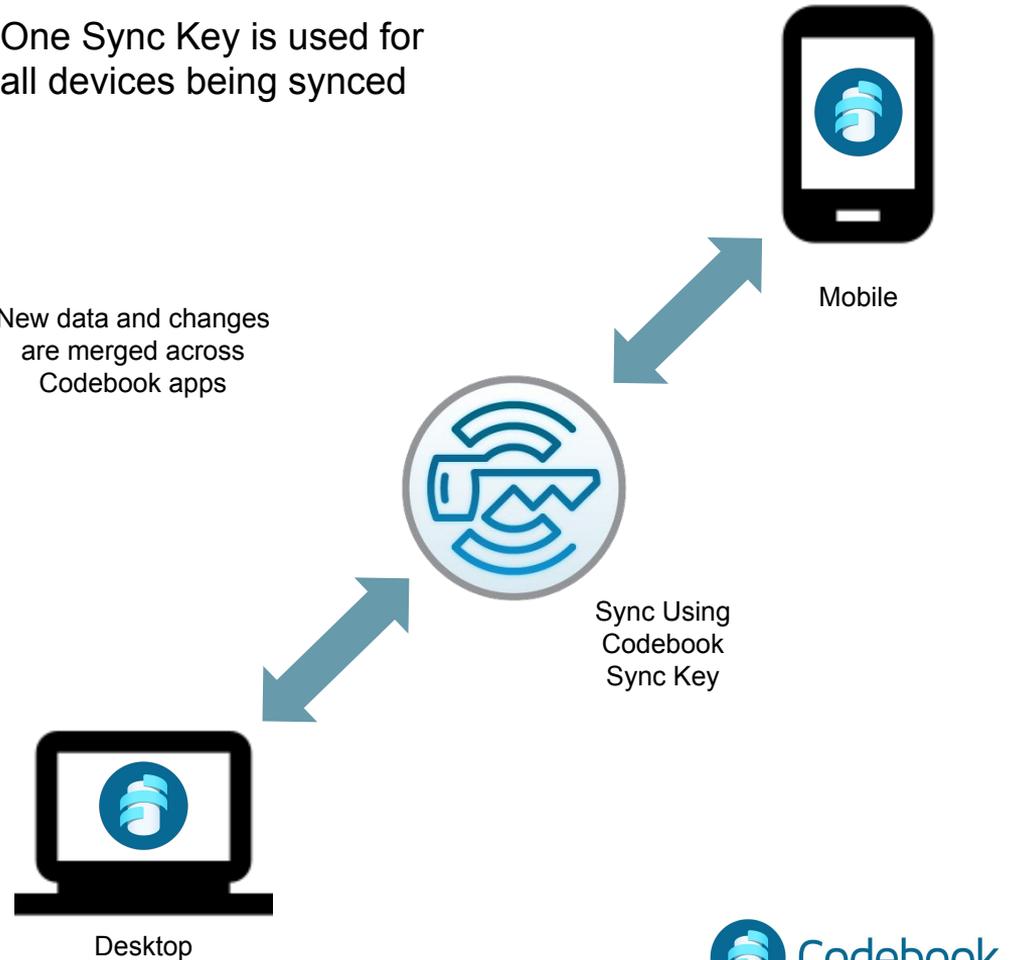
Methods for Syncing:

1. Codebook Cloud \*\*
2. Cloud Service (Google Drive or Dropbox)
3. Desktop WiFi

\*\* Codebook Cloud is a subscription service that automatically syncs your devices as changes are made.

One Sync Key is used for all devices being synced

New data and changes are merged across Codebook apps



# Create Codebook Cloud Account

Codebook Cloud is an optional subscription service that automatically syncs your changes to all of your devices.

You can create a Codebook Cloud account during Codebook installation or from the Sync Preferences Menu.

## During Installation:

- 1 - Enter email address
- 2 - Tap Go
- 3 - Follow instructions to create account

OR

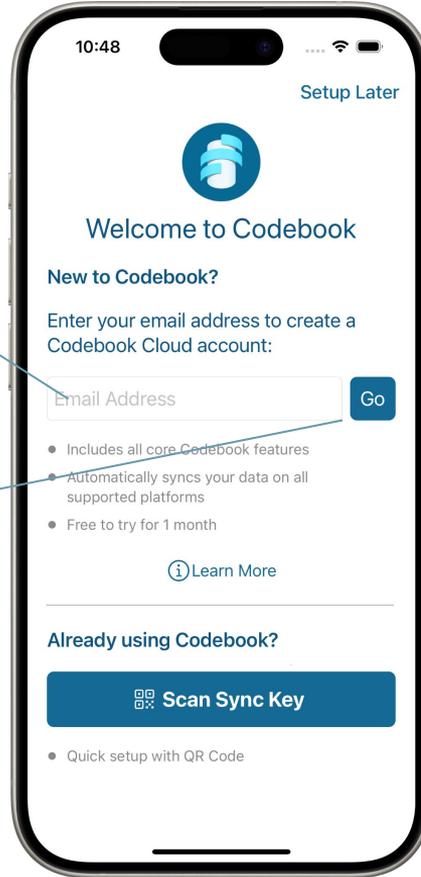
## From Sync Preferences:

- 1 - Sync

For More Info:

<https://www.zetetic.net/codebook/documentation/create-codebook-cloud-account/?platform=ios>

## During Installation:



## From Sync Menu:



# Create Codebook Cloud Account

Codebook Cloud is an optional subscription service that automatically syncs your changes to all of your devices.

After Installation from Sync Preferences:  
(continued)

1 - Sync (previous page)

2a - Tap Service

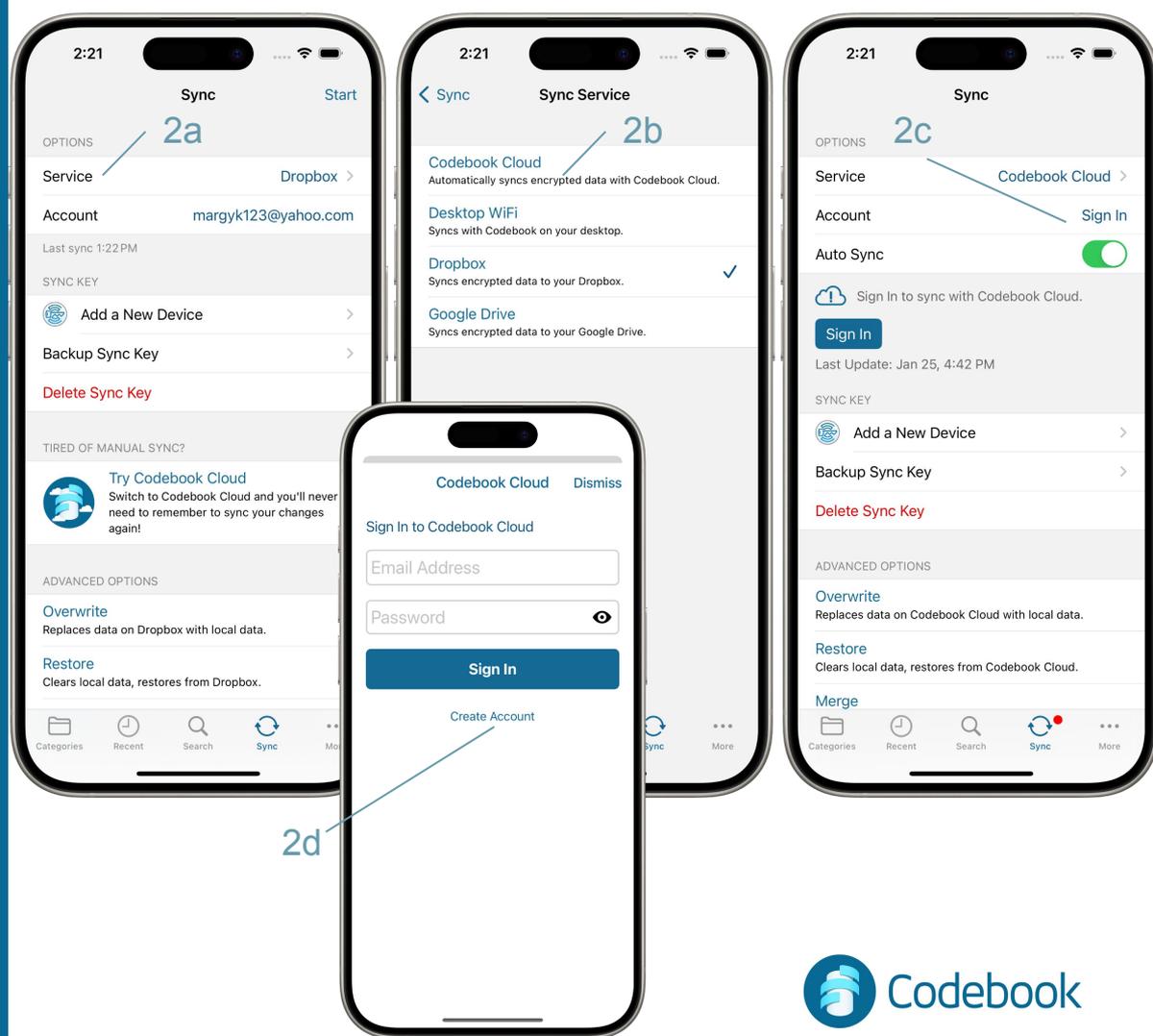
2b - Tap Codebook Cloud

2c - Tap Create Account

2d - Follow instructions to Create Account

For More Info:

<https://www.zetetic.net/codebook/documentation/create-codebook-cloud-account/?platform=ios>



# Set Sync Method

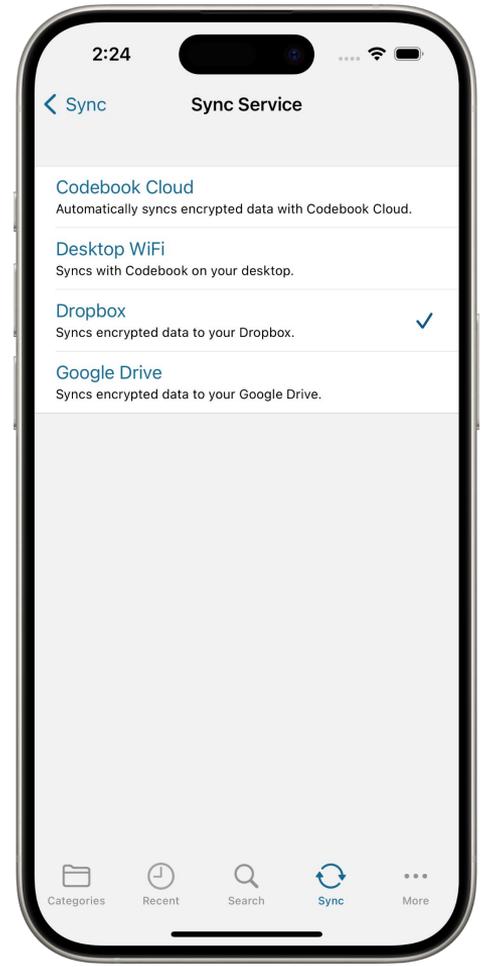
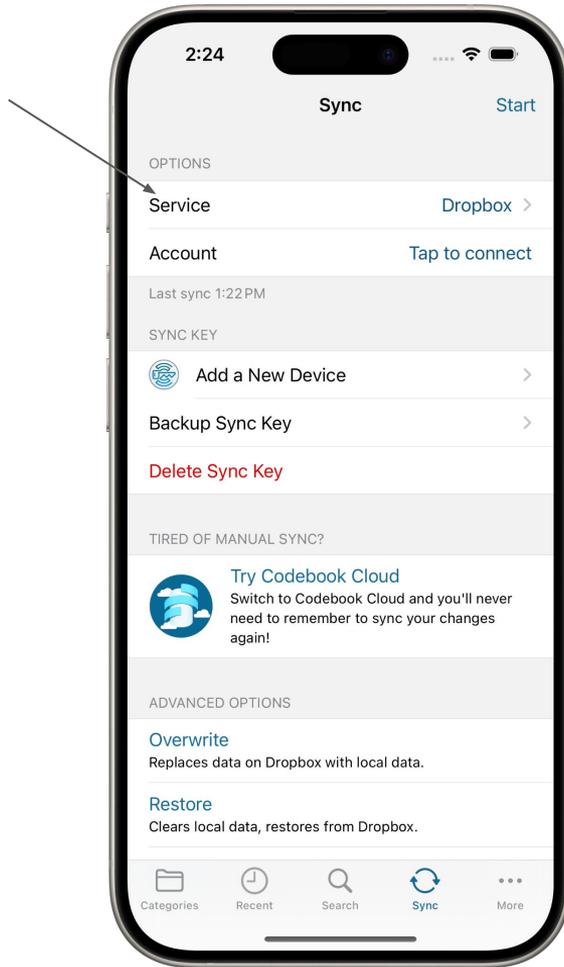
When Codebook is first setup, you want to setup a Sync Key to sync your data with Codebook on other devices.

You will be prompted to enter a Sync Service.

Tap the Sync Method you would like to use:

- Codebook Cloud
- Desktop WiFi
- Dropbox
- Google Drive

NOTE: Even if you only use Codebook on one device, syncing your data creates an encrypted backup copy of your data in a cloud service, which will allow you to restore your data in case your device is lost, damaged or stolen. \*\* You will need a Backup Sync Key to restore your data.



# Initial Sync Key Setup

If you created a Codebook Cloud account during installation, your Sync Key was generated for you.

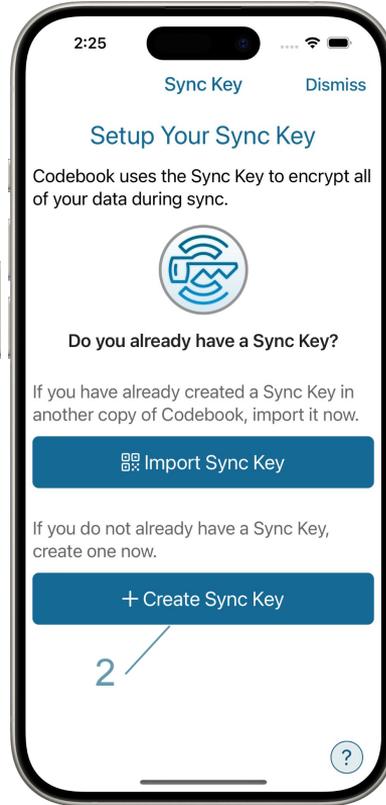
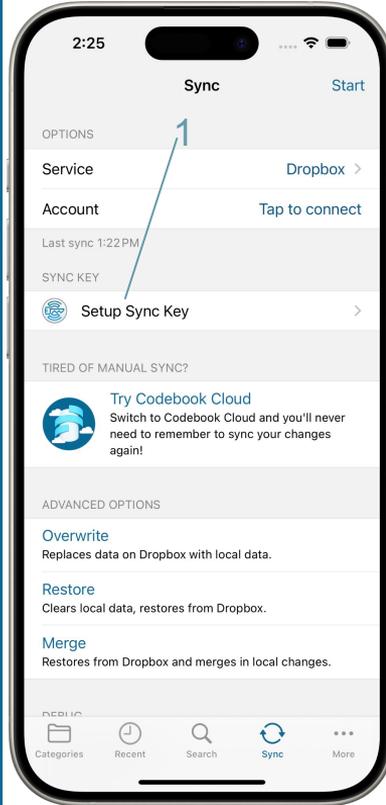
If you need to create a Sync Key

1 - Select Setup Sync Key from the Sync Menu

2 - Since this is your initial Codebook setup, Tap Create Sync Key

3 - Your new Sync Key will be generated

\*\* A new Sync Key is generated only once and needs to be imported to ALL other devices. \*\*



# Backup Sync Key

Your Sync Key is needed to encrypt and decrypt your data when syncing your devices. You should generate a backup of your Sync Key so you can retrieve your data in the event that your device is lost or damaged.

Options for creating a Backup Sync Key:

## 1. Print a Backup Code

- a QR code representing your Sync Key encrypted with your Master Password

\*\*\* Be sure to write down your Master Password of the device generating the backup in the space provided \*\*\*

## 2. Write Down Word List

- a list of 20 words that can be used to generate the same encryption key that is stored in your Sync Key.

Master Password not required to decrypt a Word List

## 3. Save As File

- creates a file that can be copied to another device for backup or import

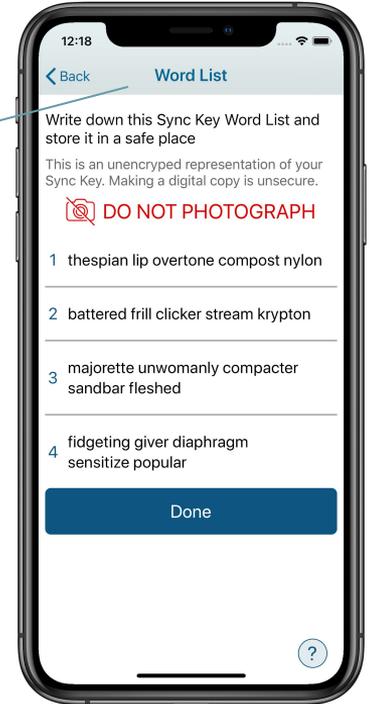
\*\* Master Password required to decrypt the file - be sure to keep a record of it \*\*



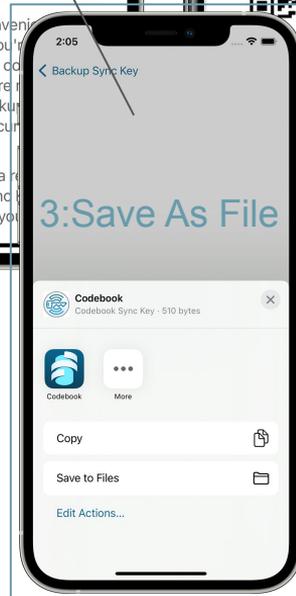
## 1: Backup Code



## 2: Word List



## 3: Save As File



# Import an Already Existing Sync Key During Installation

During initial setup, you will be given the option to Scan your Sync Key

- 1 - Click Scan Sync Key
- 2 - Scan Backup QR Code
- 3 - Enter Master Password for Sync Key
- 4 - Confirmation of Successful Import

To import your Sync Key after installation, select Setup Sync Key from the Sync menu



# Import an Already Existing Sync Key

1. From the Sync Menu, tap Setup Sync Key
2. Since you already have a Sync Key, click Import Sync Key and you will be prompted to scan your Sync Key.

To import your existing Sync Key you can scan it from another device or from a printed copy.

To Display Sync Key from the desktop app:-

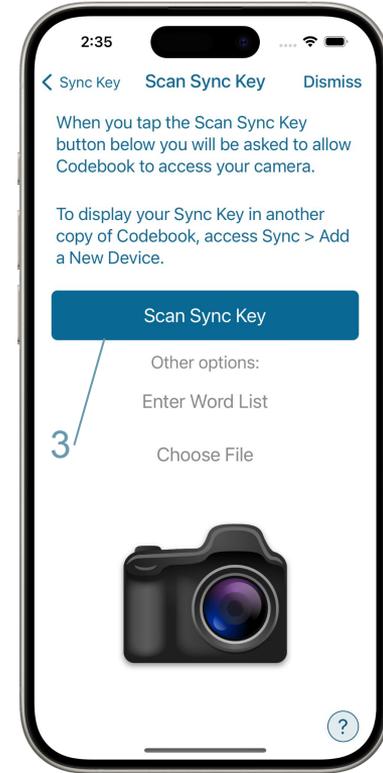
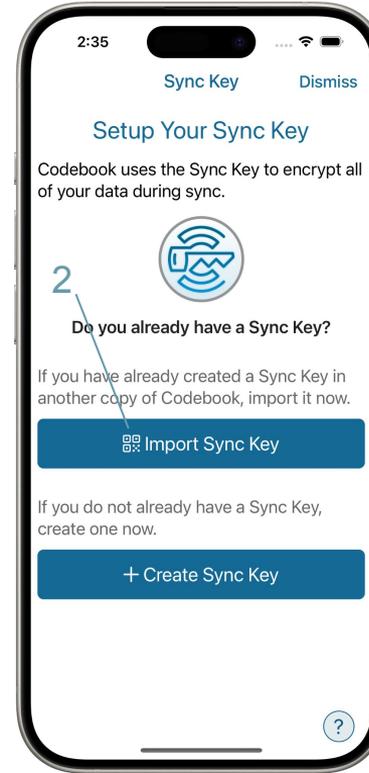
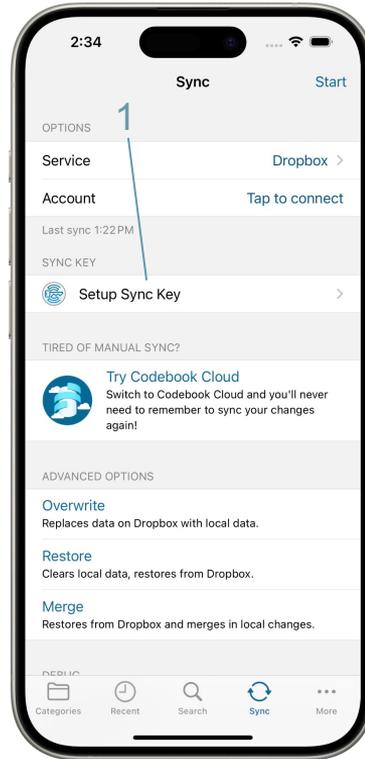
select Sync menu > Add a Device From the To Display Sync Key from mobile device: -

Sync View > Add a Device

This will display a QR code containing an encrypted representation of your Sync Key.

3. Click Scan Sync Key and scan the displayed or previously printed QR code to import it to the new device. You then need to enter the Master Password used when the sync key was generated.

\*\* There is only one sync key that is used for ALL of your devices. \*\*



# Import an Already Existing Sync Key (continued)

## Enter Word List to Import Sync Key

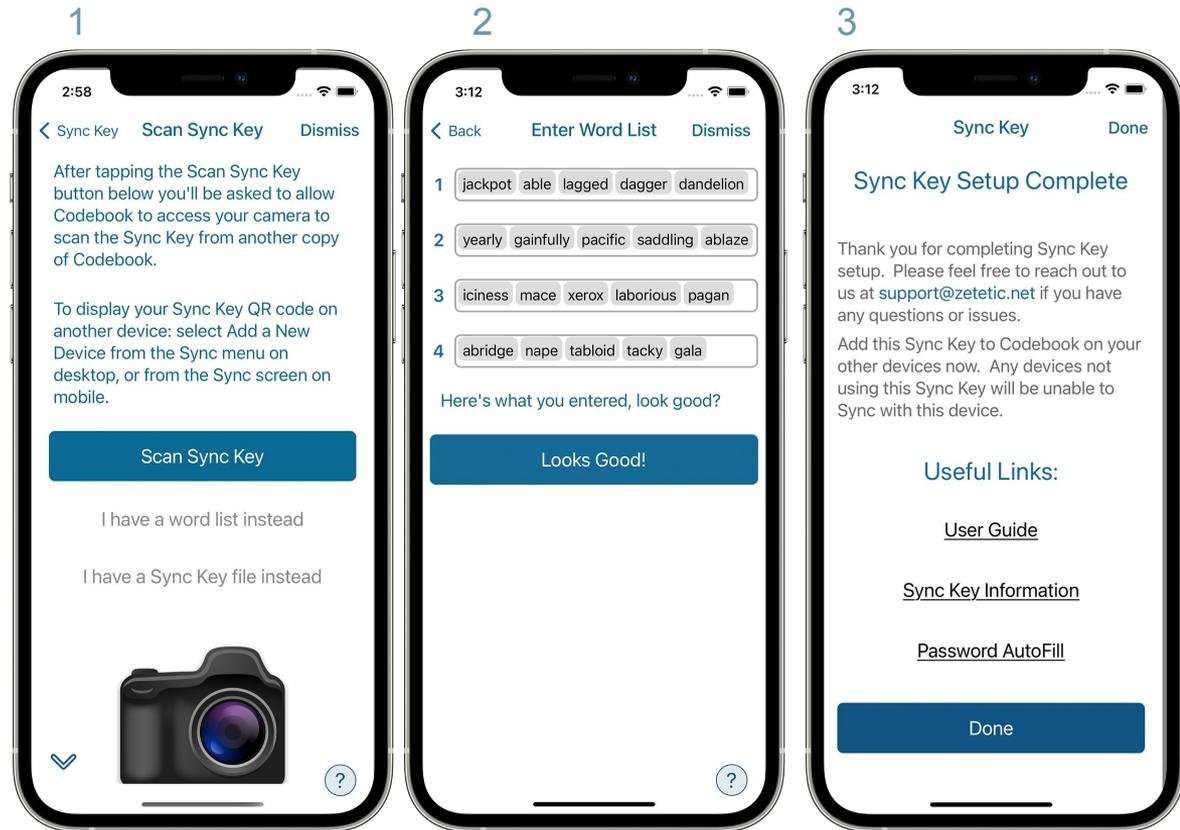
1 - Tap I have a word list instead

2 - Enter the 20 words in the Word List in order

- Click Looks Good!

3 - Sync Key Setup Complete

### Word List:



# Import an Already Existing Sync Key (continued)

## Import Sync Key From a File

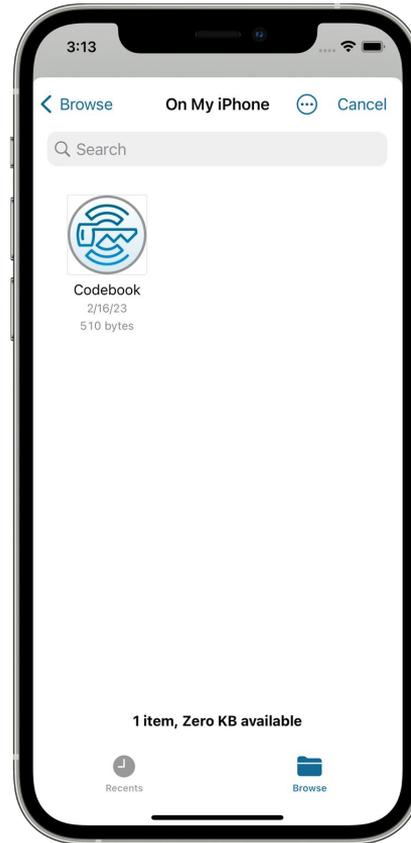
1 - You will be prompted to select the location of the file \*\*

2 - Enter the Master Password for the Sync Key file

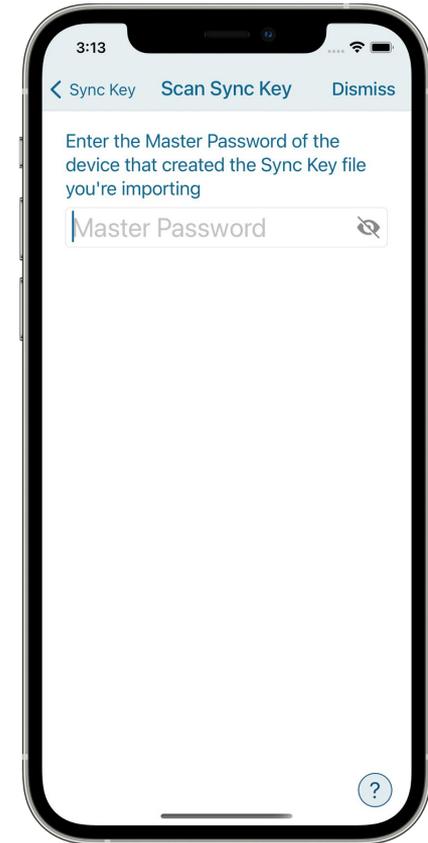
\*\* the file was created with the name Codebook.synckey

Import File:

1



2

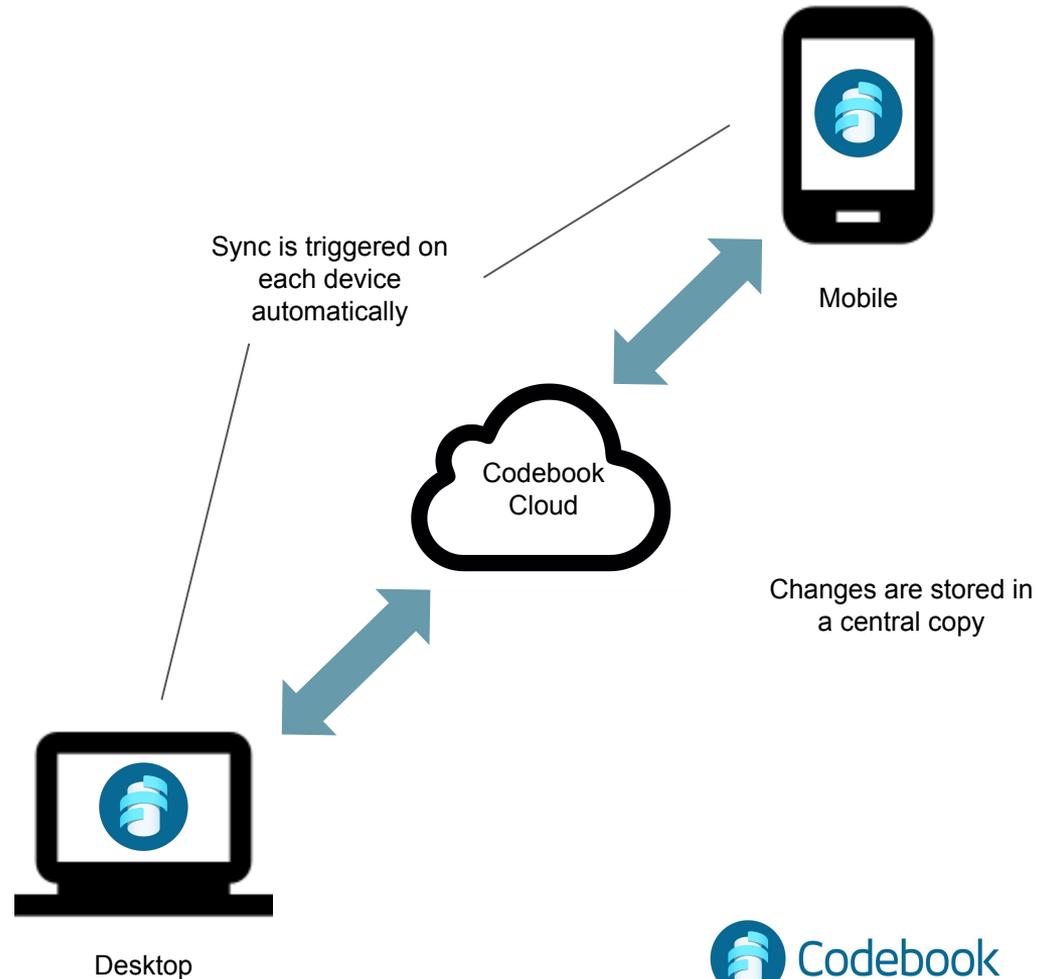


# Codebook Cloud Synchronization

Codebook Cloud is a subscription sync service that allows you to make changes to your Codebook records on multiple device and it will automatically keep them up-to-date

All of your devices must have Codebook Cloud selected as the sync preference and be signed in to the same Codebook Cloud account.

\*\* The same Sync Key is used for all of your devices \*\*



# Cloud Service Synchronization

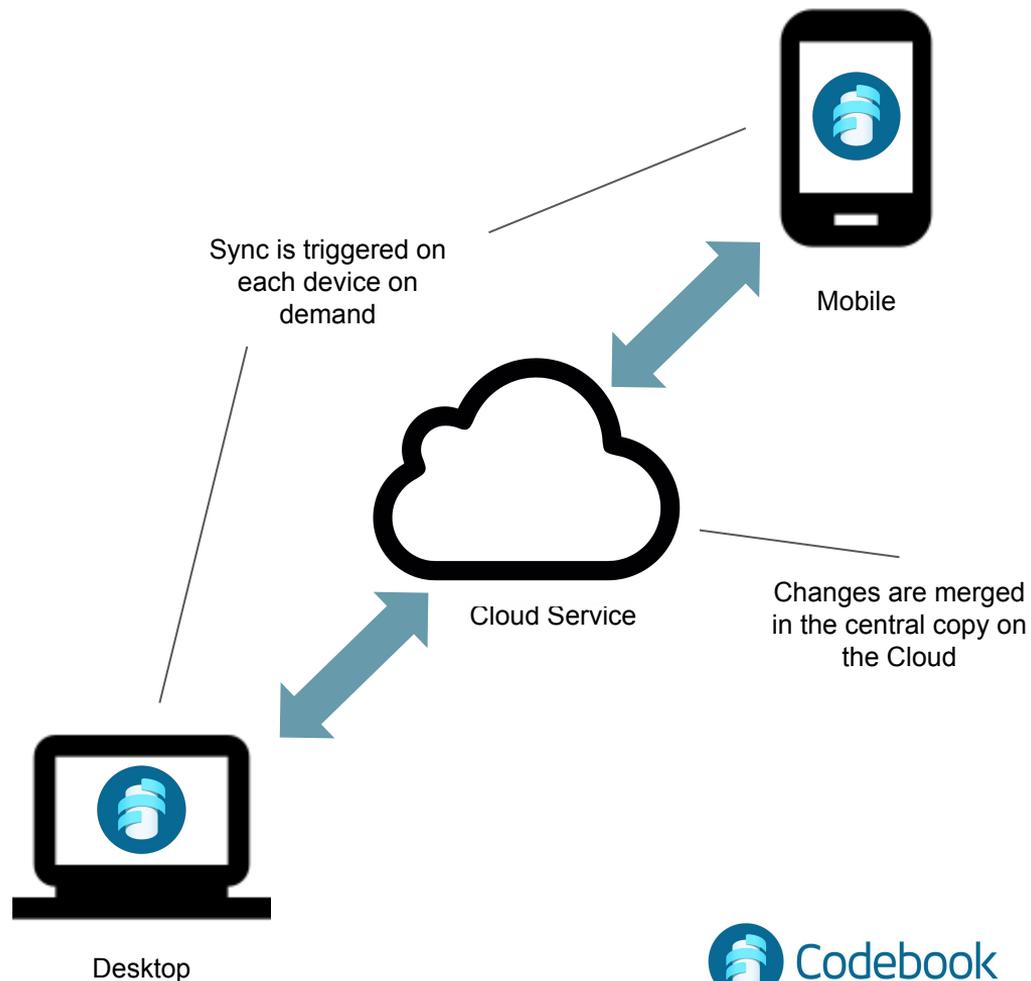
Data can be synced using your Dropbox or Google Drive account

All data on the Cloud is encrypted using your Sync Key

When syncing using a cloud service, the sync process must be initiated from each device to ensure all changes are made on all devices.

Syncing is performed with one Cloud Service at a time

\*\* The same Sync Key is used for all of your devices \*\*



# Cloud Service Sync iPhone

1. Tap the Sync Row in the Navigation bar to display the Sync Menu

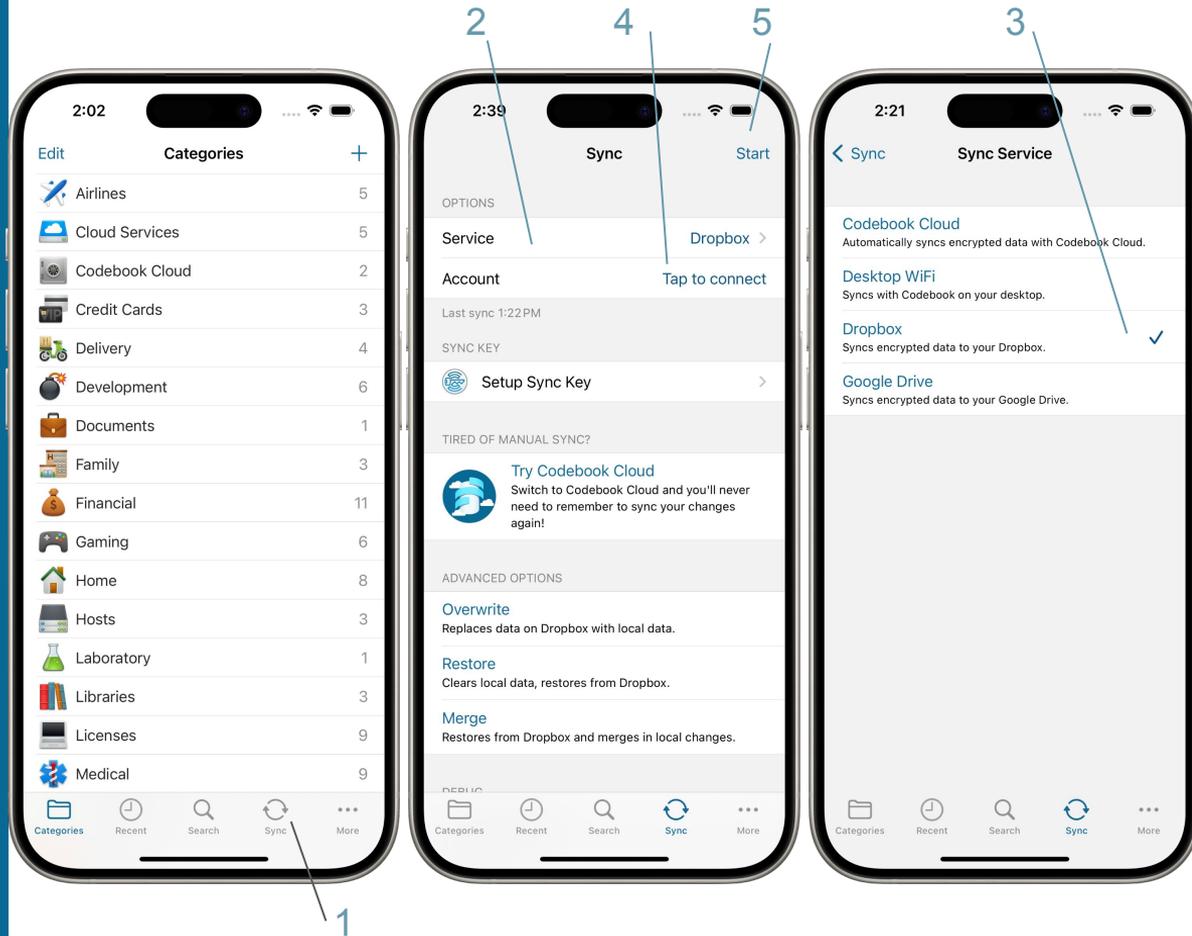
Set Options:

2. Tap Service

3. Select Dropbox or Google Drive

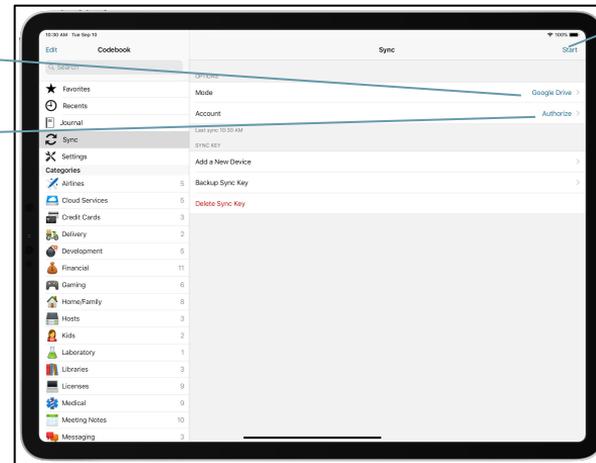
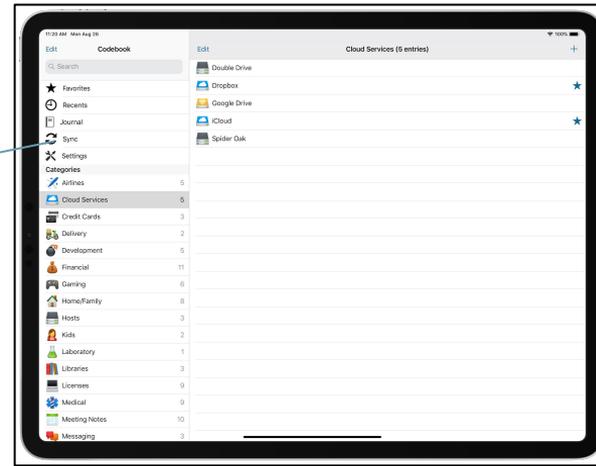
4. Tap Account - to Authorize  
Codebook to access your Cloud  
Service account

5. Tap Start to begin sync



# Cloud Service Sync for iPad

1. Tap Sync in the side Navigation Pane
2. Select the Mode to the desired cloud service
3. Link to your Google Drive or Dropbox account
4. Tap Start - to start the sync process



# Cloud Service Sync example

## Computer

1. User adds a new entry in Codebook
2. Initiate Sync
3. Changes copied to the Cloud Service

9. Initiate Sync
10. Mobile changes merged from Cloud Service to Codebook Desktop

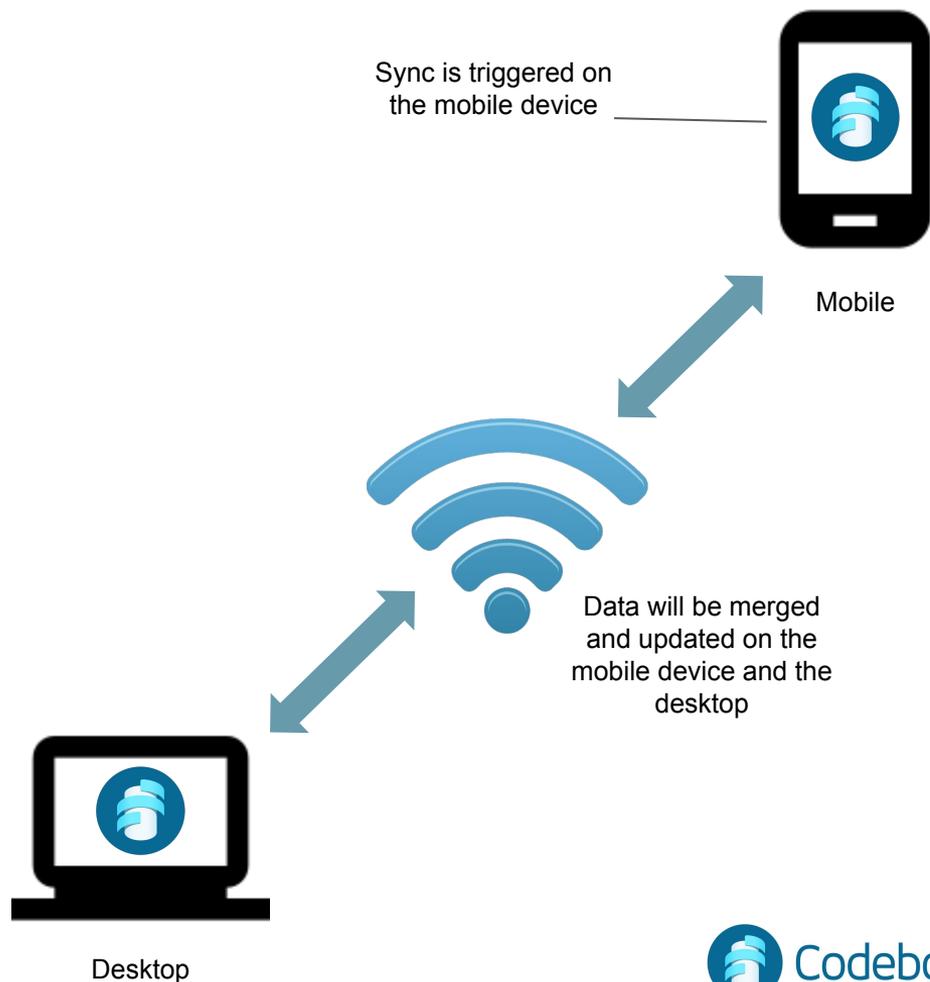
## Mobile Device

4. Initiate Sync
5. Desktop changes merged from Cloud Service to Codebook Mobile
6. Edit Entries on Codebook Mobile
7. Initiate Sync
8. Mobile changes copied to Cloud Service

# How to Sync Using Desktop WiFi

1. On the desktop app, enable the WiFi Sync Option.  
Preferences > Sync > Desktop WiFi
2. On the mobile device, visit the sync view
  - set Mode to Desktop WiFi
  - set Computer to match your desktop name
  - Tap Start to initiate the sync process

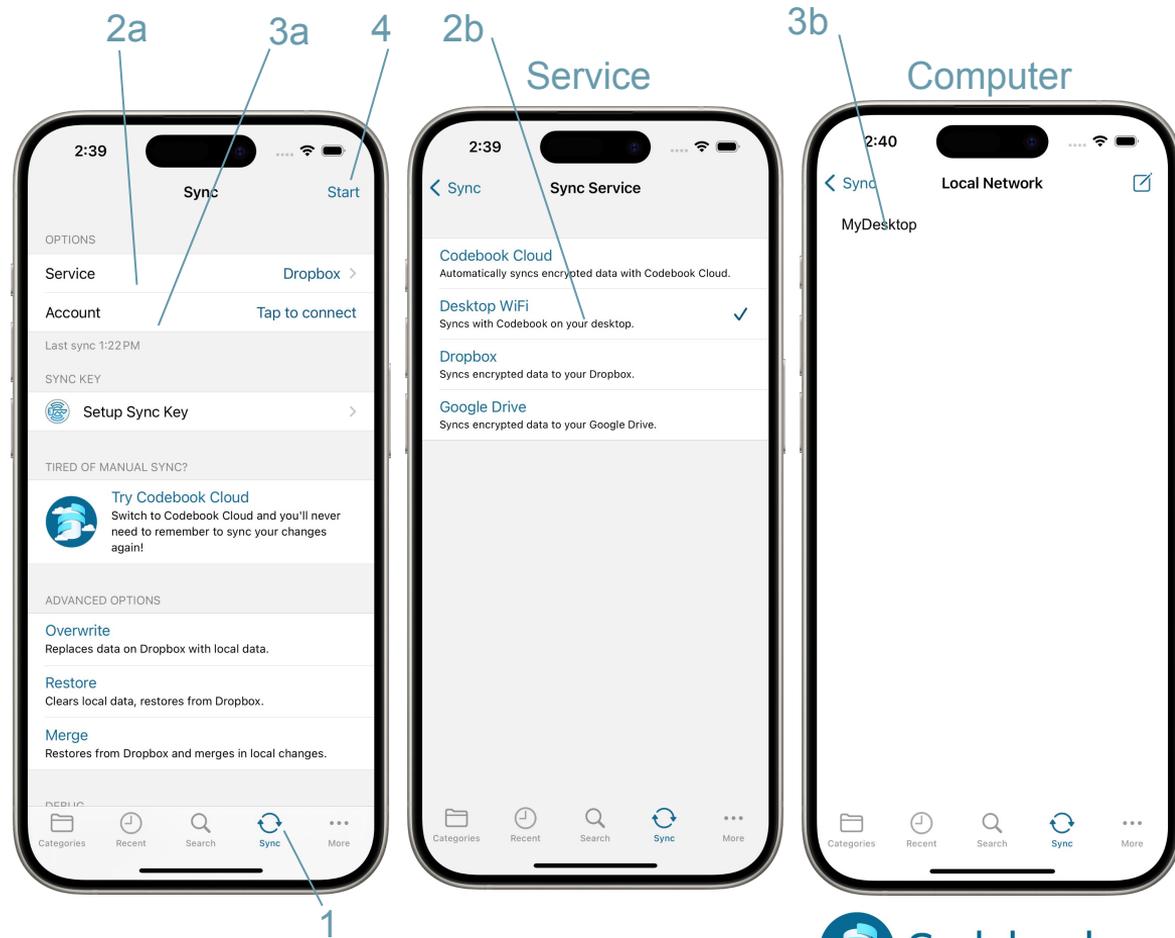
The data from the desktop app and the mobile device will be merged and updated on both devices.



# Desktop WiFi Sync for iPhone

1. Tap Sync on the navigation bar
2. Set Service:
  - 2a. Tap Service
  - 2b. Select Desktop Wifi
3. Set Computer:
  - 3a. Tap Computer - Browse Network
  - 3b. Select your network name from the list
4. This will enable the start button which you can tap to begin the sync process

Note: The desktop and iOS device must be connected to the same WiFi network.



# Important Preferences

# Accessing Settings

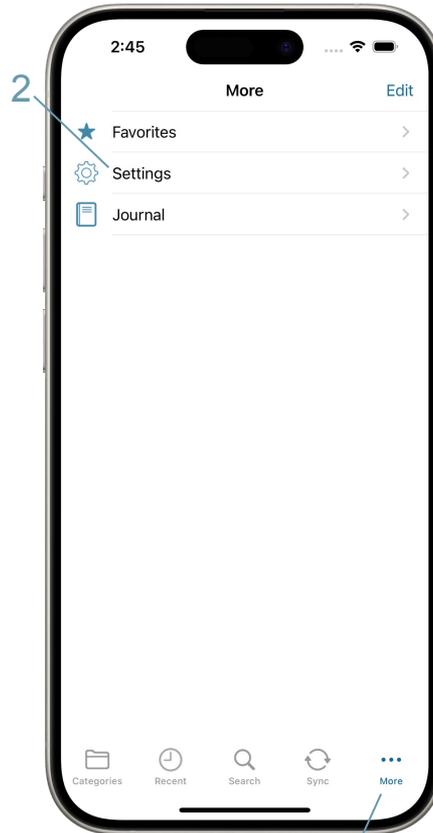
iPhone:

1. Tap More in the Navigation Tab Bar
2. Tap Settings

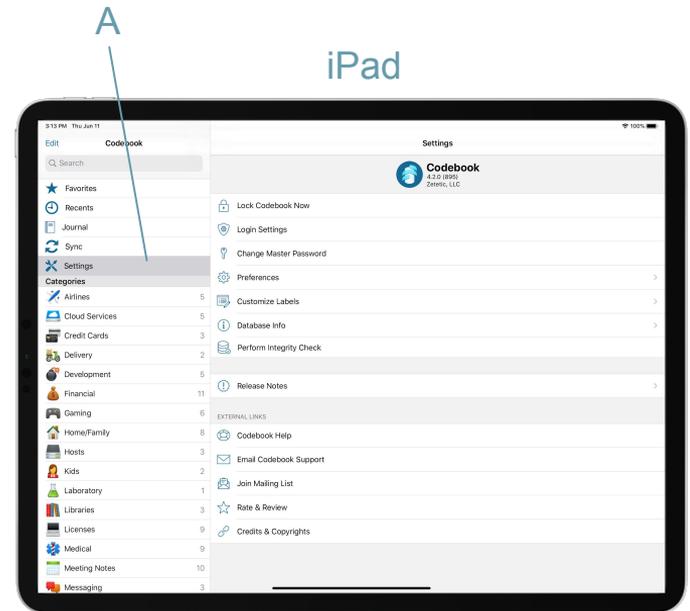
iPad:

- A. Tap Settings in the Side Navigation Pane

iPhone



iPad



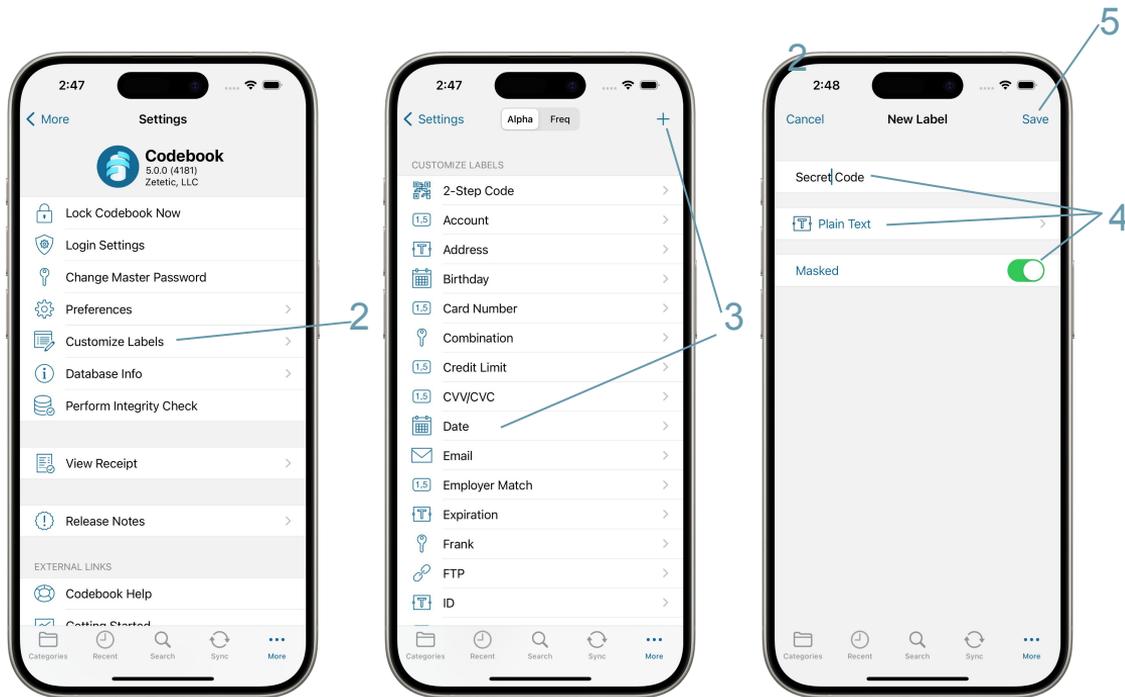
# Customize Labels

Add new custom labels

Customize behaviors

Enable masking

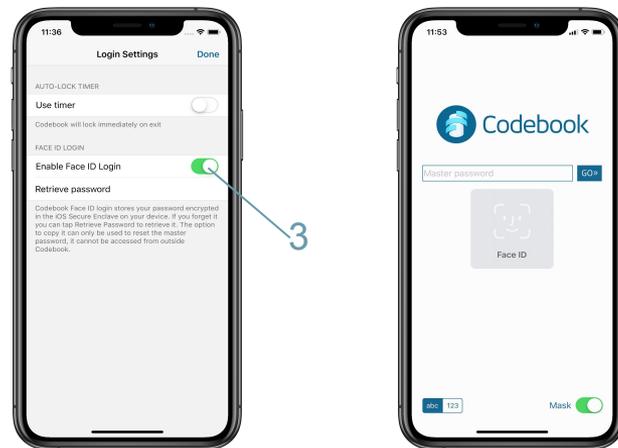
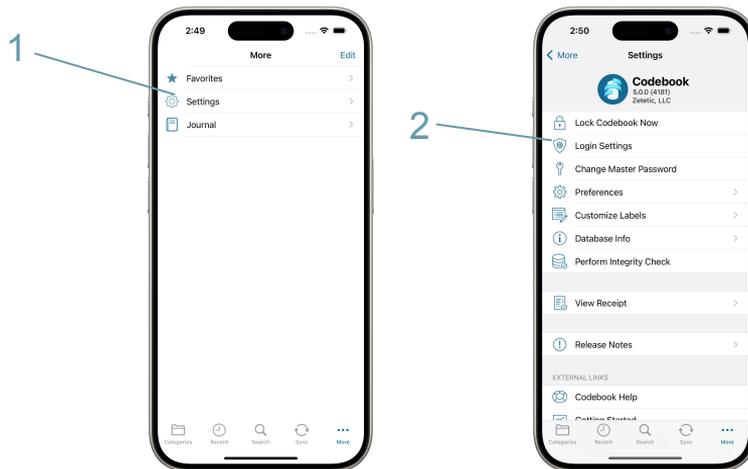
1. Tap More -> Settings
2. Customize Labels
3. Select existing or add new Label
4. Edit Label
5. Save



# Biometric Authentication

1. Settings
2. Login Settings
3. Flip the “Enable Face ID Login” switch on

Codebook will prompt you for your face at the login screen



# Autolock

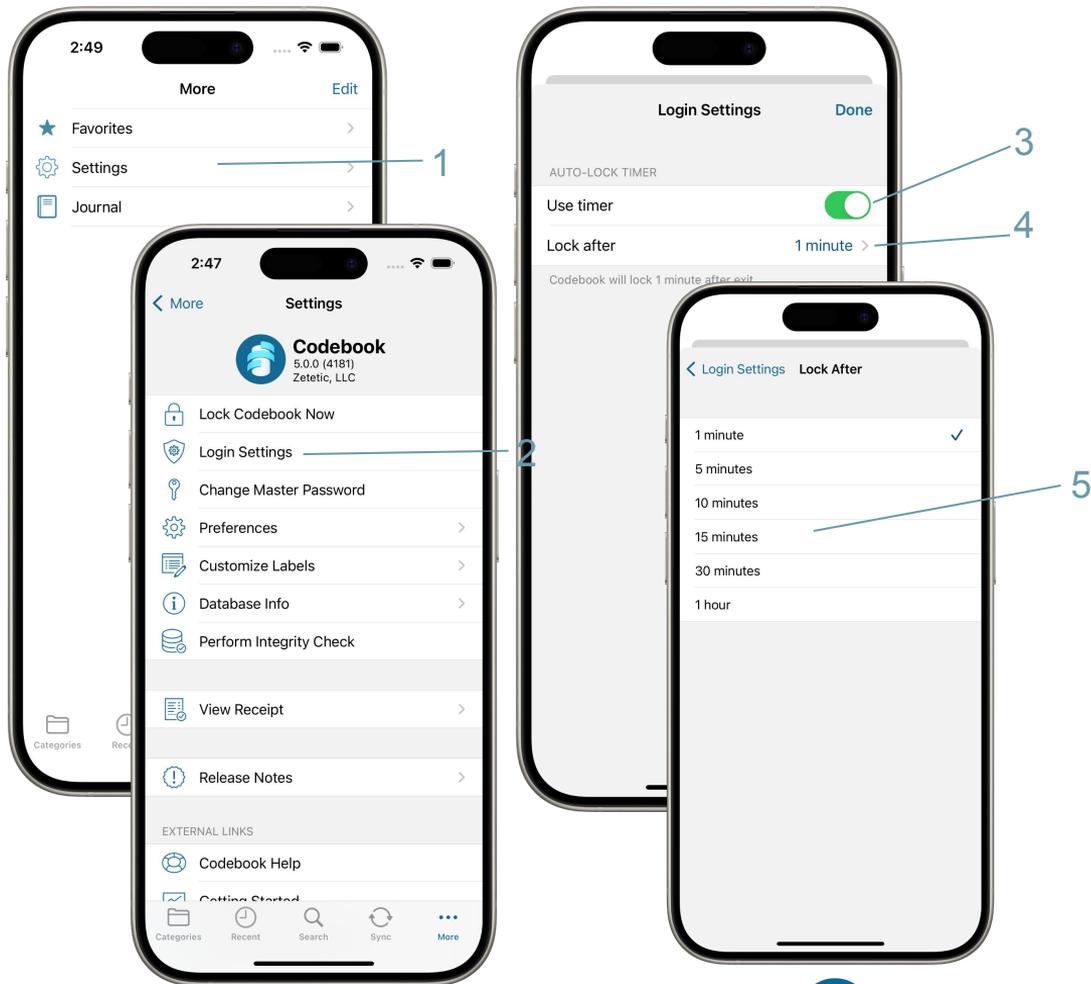
Leaves application unlocked for a designated period of time (default 1 minute)

Automatically locks application when timer expires

Allows more convenient access without repetitious logins

Tip: Be careful, when autolock is enabled

1. Settings
2. Login Settings
3. Turn on Use Timer
4. Tap Lock after
5. Select time period

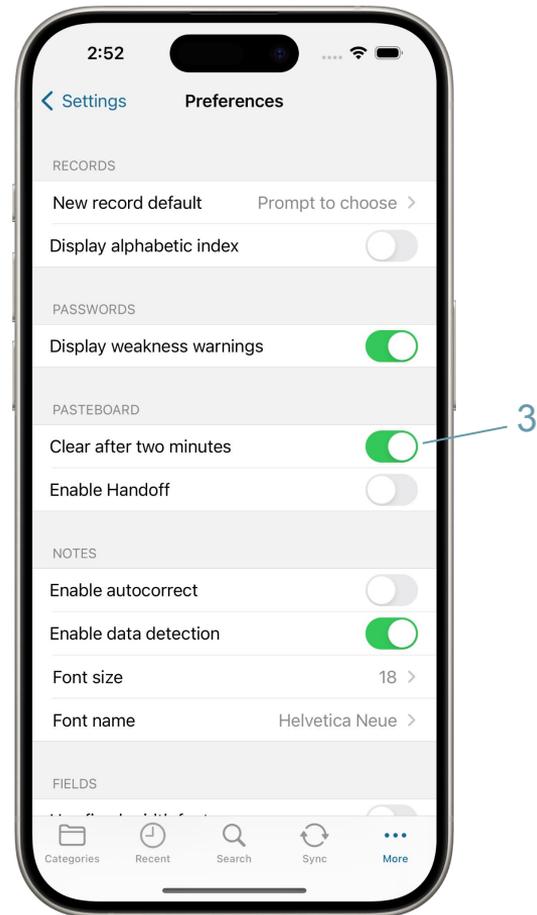
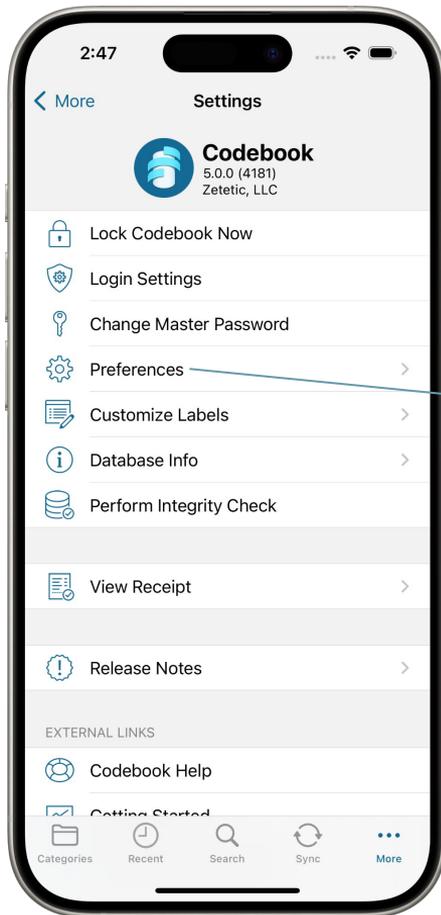


# Clipboard clear

Codebook automatically wipes secrets from the system clipboard after 2 minutes

1. Settings
2. Preferences
3. Clear after two minutes

Turned on by default



# Autocorrect

Enable note fields to provide suggestions for spelling changes.

Important: Autocorrect may leak information into the system dictionary. Enable this setting reduces system security.

Autocorrect is available on iOS only

1. Tap More -> Settings
2. Preferences
3. Enable autocorrect



# Data Detection

Data Detection allows you to interact with websites, phone numbers, addresses, flight numbers, dates and more within Note Entries.

1. Enable data detection in Preferences.
2. Data that can interact will have a slight underline or blue highlight.

Examples:

Dates - added to your calendar.

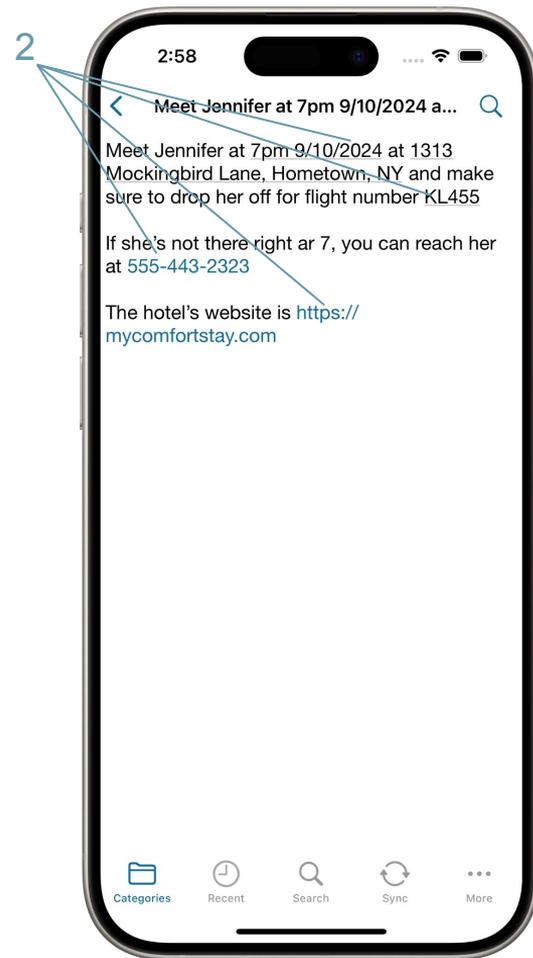
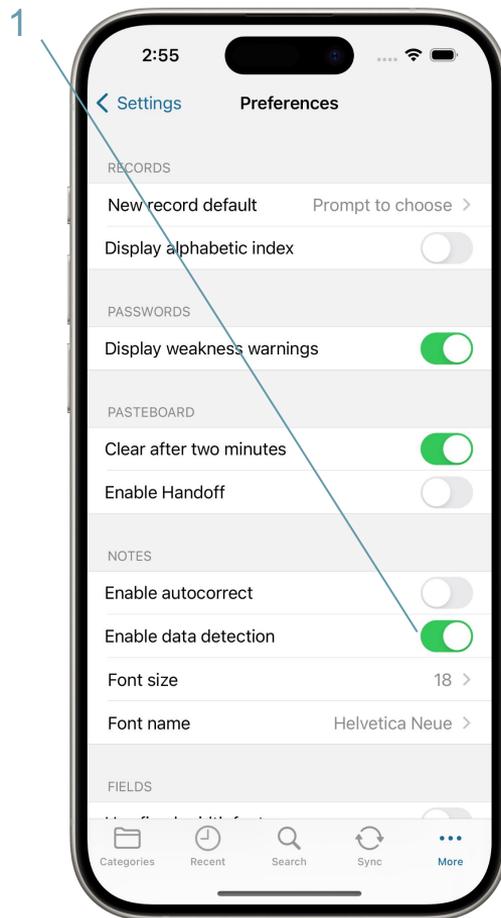
Phone numbers - add to contacts, send message.

Website - opened, added to reading list.

Address - get directions, opened in maps

Email - send message, add to contacts

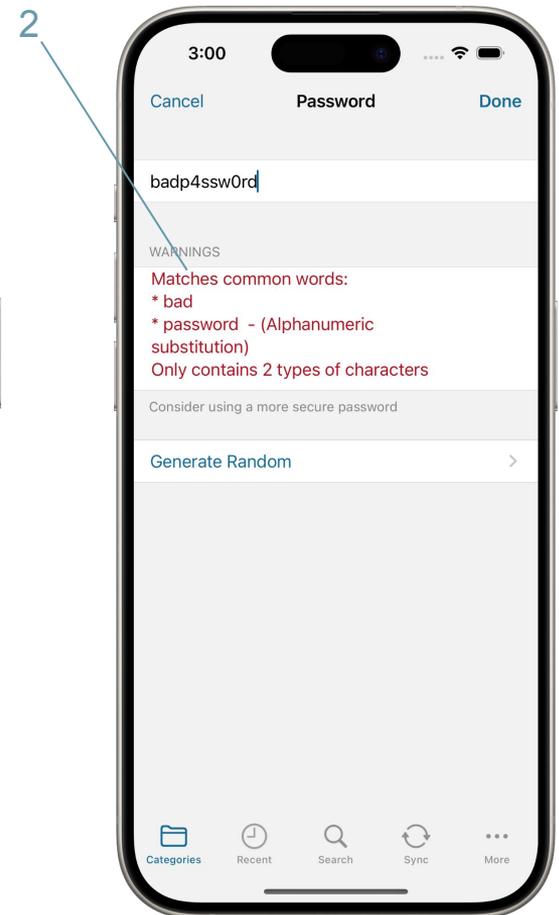
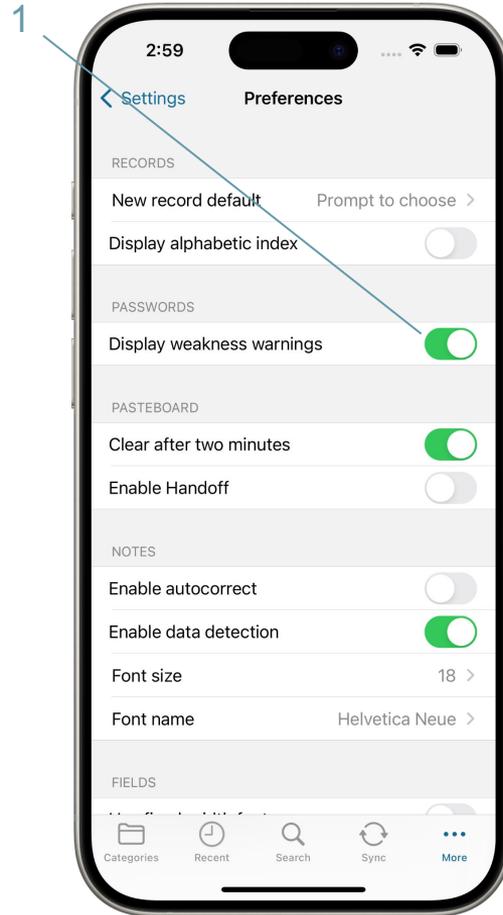
Flights - preview flight information



# Password Weakness Warnings

When Display weakness warnings is turned on in Preferences, your password field will be examined as you enter it and a list of possibly weakness will be displayed.

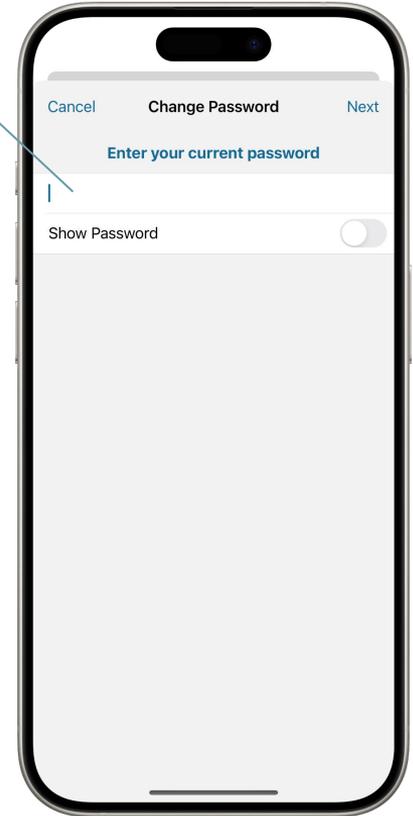
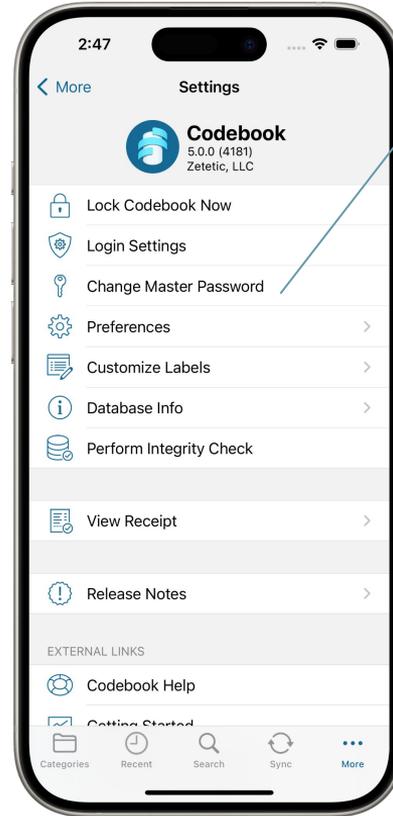
1. Enable Display weakness warnings in Preferences.
2. As you enter a password, possible weaknesses will be displayed in the warnings section.



# Other Features

# Change Master Password

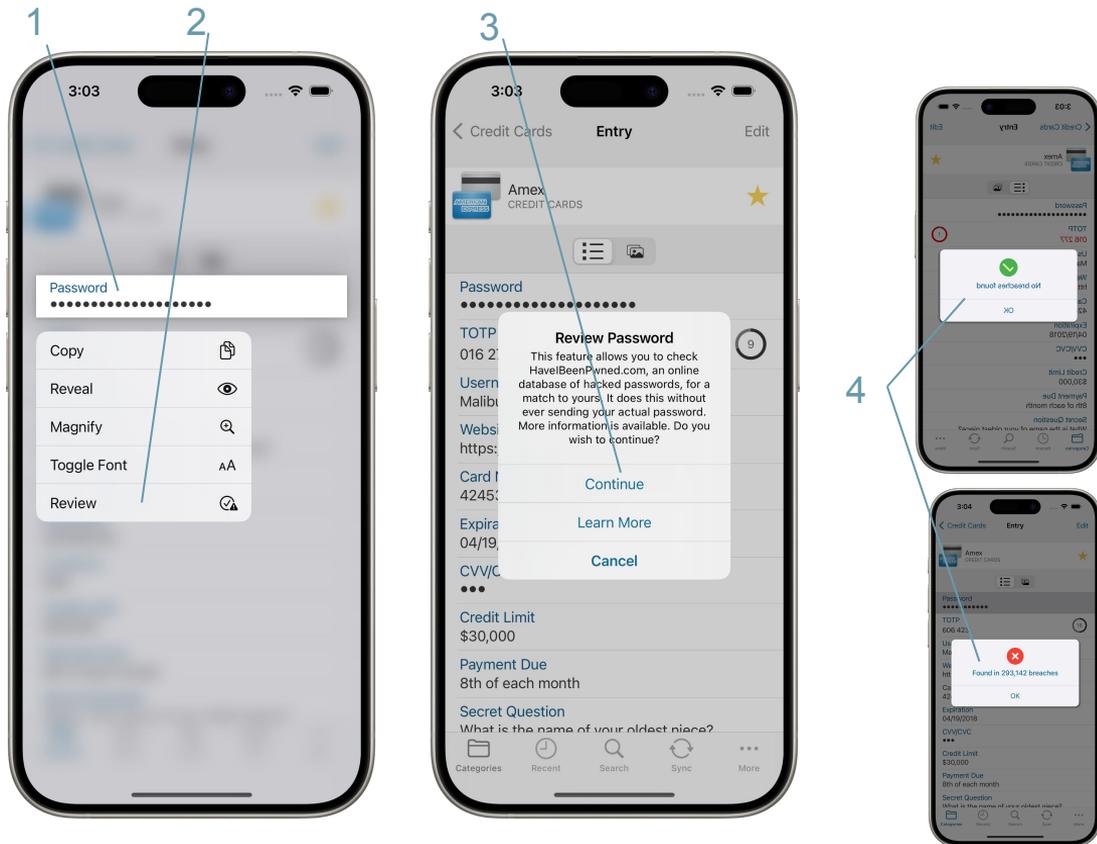
1. Tap More -> Settings
2. Change Password
3. Enter current password and new password when prompted



# Password Review

On an Entry that has a password:

1. Tap on the Password row. The Password Options Menu will be displayed.
2. Tap on Review Password.
3. The first time you use Password Review, Codebook will ask you to confirm that you want to continue. Tap Continue
4. Codebook will let you know if any breaches were found



# Magnify a Field

1. Tap on a field. The Field Options Menu will be displayed.
2. Tap Magnify
3. The value of the field will be displayed in a large font.

Note: You can also long tap on a field and the copy and magnify options will be displayed.

