# 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







#### 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

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

1:23
Edit Categories +
Airlines 5
Cloud Services 5
Codebook Cloud 2
Credit Cards 3
Delivery 4
<b>Development</b> 6
Documents 1
Family 3
💰 Financial 11
F Gaming 6
Home 8
Hosts 3
Laboratory 1
Libraries 3
Licenses 9
 🐉 Medical 9
Categories Recent Search Sync More
2 3 4 5

6



#### 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
1:23 Categories	+ 1:25 ■ ♀ ■
🔨 Airlines	5 Double Drive
Cloud Services	5 Dropbox
Codebook Cloud	2 Google Drive
Credit Cards	3 Cloud 🛨
Delivery	4 Spider Oak
Development	6
Documents	1
Family	3
inancial	11
Gaming	6
Home	8
Hosts	3
Laboratory	1
Libraries	3
Licenses	9
Medical	9
Categories Recent Search Sync M	More Categories Recent Search Sync More



#### 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)

1	1:24	🗢 🗩	
	Cloud Services Entry	Edit	
	Google Drive		
Label			
	Username mmalibu@zetetic.net		Field
	ТОТР 637 330	3	
	Password		
	Website accounts.google.com		
	Last updated Mar 9, 2018 at 6:18 AM		
	Categories Recent Search	Sync More	6



### Create a Category

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

	1	
	1:23	
Edit	Categories	+
X	Airlines	5
	Cloud Services	5
	Codebook Cloud	2
VIP	Credit Cards	3
<mark>.</mark>	Delivery	4
Ĩ	Development	6
	Documents	1
H	Family	3
Ś	Financial	11
R	Gaming	6
	Home	8
: ::	Hosts	3
	Laboratory	1
	Libraries	3
_	Licenses	9
*	Medical	9
Categor	ies Recent Search Sync	••• More

3





#### 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)



# 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

1:53

3

Cancel Welcome to Codebook!

...

More

#### 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

Search

Thank you, Zetetic LLC

Categories



5

#### Search Within a Note

- 1. Within a note view, tap the magnifying glass
- 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!





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...

### **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

2:02	🕆 💻 🔪
Edit Categories	+
🔀 Airlines	5
Cloud Services	5
Codebook Cloud	2
Credit Cards	3
Delivery	4
Tevelopment	6
Documents	1
Family	3
💩 Financial 🛛	11
🎮 Gaming	6
🚹 Home	8
Hosts	3
👗 Laboratory	1
Libraries	3
Licenses	9
≵ Medical	9
	•••

1



2:02	~ <b>•</b>
Financial Entry	Edit
401k FINANCIAL	☆
Username mmalibu78	
Password	
Interest Rate 7.0%	
Employer Match 4%	
Secret Question What was your first pet's name?	
Secret Answer	
Website https://www.tiaa.org	
Last updated Aug 14, 2019 at 7:35 AM	
Categories Recent Search Sync	••• More



#### 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







#### 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")





#### 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

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.



### 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-codeb ook-cloud-account/?platform=ios

#### During Installation:



2

#### 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-codeb ook-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 \*\*\*
 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 \*\*



### 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

 From the Sync Menu, tap Setup Sync Key
 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: 3 2 2 3:12 Svnc Kev Sync Key Scan Sync Key Dismiss K Back Enter Word List Dismiss Done After tapping the Scan Sync Key Sync Key Setup Complete jackpot able lagged dagger dandelion button below you'll be asked to allow Codebook to access your camera to scan the Sync Key from another copy 2 yearly gainfully pacific saddling ablaze Thank you for completing Sync Key of Codebook. setup. Please feel free to reach out to 3 iciness mace xerox laborious pagan us at support@zetetic.net if you have To display your Sync Key QR code on any questions or issues. another device: select Add a New Add this Sync Key to Codebook on your 4 abridge nape tabloid tacky gala Device from the Sync menu on other devices now. Any devices not desktop, or from the Sync screen on using this Sync Key will be unable to mobile. Here's what you entered, look good? Sync with this device. Scan Sync Key Looks Good! Useful Links: I have a word list instead User Guide I have a Sync Key file instead Sync Key Information Password AutoFill Done 2 (?)



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





#### 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 \*\*



Desktop

### **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 \*\*



Desktop

#### 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

- 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

Edit Codebook	Edit	Cloud Services (5 entries)	+
9, Search	Double Drive		
★ Favorites	Cropbax		*
Recents	🧾 Google Drive		
Journal	iCloud		*
Sync	Spider Oak		
X Settings			
Categories			
🔀 Airlines	5		
Cloud Services	5		
Credit Cards	3		
: Delivery	2		
Development	6		
👗 Financial	11		
🞮 Garning	6		
Home/Family	8		
Hosts	3		
🧕 Kids	2		
Laboratory	1		
Ilbraries	3		
Licenses	9		
🍪 Medical	9		
Meeting Notes	10		
Messaging	3		



2



4

### 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

 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

#### 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 Network3b. 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

Favorites Settings Journal	More		> >
Settings Journal			>
Settings			>
Journal			
			>
	Q Search	Şync	More /

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		iPad	
		ii aa	
13 PM Thu Jan 11			* 100%
idit Codebook		Settings	
Q, Search		Codebook	
★ Favorites		Zeteic, LLC	
Recents		Lack Codebook Now	
Journal		Login Settings	
5 Sync		Change Master Password	
< Settings		(3) Preferences	>
Airlines	5		
Cloud Services	5	Customize Labels	
Credit Cards	3	(i) Database Info	>
belivery	2	Renform Integrity Check	
Development	5	~	
Financial	11	(!) Release Notes	· · · ·
🖣 Gaming	6	EXTERNAL LINKS	
Home/Family	8	Codebook Help	
Hosts	3	Email Codebook Support	
kids	2	in Mailing List	
Laboratory	1		
Libraries	3	24 Kate or Kennew	
Licenses	9	Credits & Copyrights	
Medical	9		
Meeong Notes	10		
Messaging	3		



### **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

2	2:47	-			2:47	
< Mor	e Settings			< Set	tings	Alpha
	Codebook 5.0.0 (4181)			CUST	OMIZE LABEI	_S
~	Zetetic, LLC				2-Step C	ode
Ð	Lock Codebook Now			1,5	Account	
۲	Login Settings			T	Address	
9	Change Master Password			) IIII	Birthday	
ŝ	Preferences	>	2	1,5	Card Nun	nber
	Customize Labels	>		P	Combinat	ion
i	Database Info	>		1,5	Credit Lin	nit
	Perform Integrity Check			1,5	CVV/CVC	
				ŵ	Date	/
	View Receipt	>		$\square$	Email	
				1,5	Employer	Match
()	Release Notes	>		{T}	Expiration	ı
				9	Frank	
EXTER	NAL LINKS			P	FTP	
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Categorie	S Recent Search Sync	More		Categori	es Recent	( Se
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### 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

< Mor	e Settings		
	Codebook 5.0.0 (4181) Zetetic, LLC		
•	Lock Codebook Now		
	Login Settings		
Ŷ	Change Master Password		
ŝ	Preferences	>	
	Customize Labels	>	
i	Database Info	>	
	Perform Integrity Check		
Eø	View Receipt	>	
~			
$\bigcirc$	Release Notes	>	
EXTER	NAL LINKS		
$\bigcirc$	Codebook Help		
	Cotting Startad		





#### 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

★ Favorites	>1		Settings Preferences	
🐼 Settings —	>			
Journal			RECORDS	
	2:47		New record default Pron	npt to choose >
	More Settings		Display alphabetic index	
	Codebook		PASSWORDS	
	5.0.0 (4181) Zetetic, LLC		Display weakness warnings	
	Lock Codebook Now		PASTEROARD	
	Dogin Settings		Clear after two minutes	
	P Change Master Password	-2	Enable Handoff	
		>		
	Customize Labels	>	NOTES	
	i Database Info	>	Enable autocorrect	
	Perform Integrity Check		Enable data detection	
			Font size	18 >
Categories Recent	View Receipt	>	Font name H	elvetica Neue >
			FIELDS	
	(!) Release Notes	>		A
	EXTERNAL LINKS		Categories Recent Search	Sync More
	🖄 Codebook Help			
	Catting Started			

#### **Data Detection**

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

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

Examples:

<u>Dates</u> - added to your calendar. <u>Phone numbers</u> - add to contacts, send message.

<u>Website</u> - opened, added to reading list. <u>Address</u> - get directions, opened in maps <u>Email</u> - send message, add to contacts <u>Flights</u> - 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

3:03 Password			····
		•	
Сору		¢	
Reveal		۲	
Magnify		€	
Toggle Font		AА	
Review	1	()	
			۳.

3,		
3:0		
< Credit	Cards Entry	Edit
AMISSON	Amex CREDIT CARDS	*
Passwo	rd	
<b>TOTP</b> 016 2	Review Password This feature allows you to check	()
Usern Malibu	HavelBeenPyned.com, an online database of hacked passwords, for a match to yours It does this without ever sending your actual password.	
Websi https:	More information is available. Do you wish to continue?	
Card 1 4245:	Continue	
Expira 04/19	Learn More	
	Cancel	
Credit L \$30,000	.imit 0	
Paymer 8th of e	nt Due each month	
Secret (	Question the name of your oldest niece?	• • • • Mare
Categories	Recent Search Sync	More



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### 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.



3



