Codebook

Codebook for iPhone and iPad
Introduction and Usage
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, uppercase, 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 Tab Bar
2. Favorites
3. Recents
4. Search
5. More (Settings and Sync)
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. Favorites
3. Recents
4. Search
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
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. 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. 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 tap

- **Email**
  - Launches email client on tap

- **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
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!
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 navigation area
2. Choose Entry
3. To un-favorite an entry from the favorite view:
   a. Swipe left on the entry’s row
   b. Tap Remove
Recents

Quick retrieval of the 20 Entries most recently accessed

1. Choose “Recents” from the navigation area
2. Choose an Entry

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”)

Codebook
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”)

![Search Interface on iPad]

- [Image of search interface on iPad]
- [Image of search results on iPad]

**Codebook**
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
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 "Overwrite" mode after a password change

Use "Restore" mode to initialize a database on a brand new device
How to Sync

1. Tap More in the Navigation Tab Bar
2. Tap the Sync row
3. Select the appropriate sync operation.
4. Link to Google Drive or Dropbox
5. Tap Start
How to Sync - iPad

1. Tap Sync in the Side Navigation Pane
2. Select the appropriate sync operation.
3. Link to Google Drive or Dropbox
4. Tap Start
Synchronization

Codebook can keep data in sync across multiple devices

Changes made on any device merge

All data is encrypted on Dropbox
Sync modes

- **Sync**: bi-directional merge
- **Overwrite**: Replaces remote data
- **Restore**: Overwrites 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
Desktop WIFI Sync for iPhone

1. After enabling the WIFI sync option on the desktop app, go to the Sync tab on the IOS 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. This will enable the start button which you can tap to begin the sync process.
Desktop WIFI Sync for iPad

1. After enabling the WIFI sync option on the desktop app, from the Menu bar, select the Sync tab 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. This will enable the start button which you can tap to begin the sync process.
Sync example

**Computer**

1. User add a new entry in Codebook
2. Initiate Synchronization
3. Changes copied to Google Drive, Dropbox, or Codebook for Windows/OS X

**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, Dropbox or Codebook for Windows/OS X

9. Initiate Synchronization
10. Mobile changes merged from Google Drive, Dropbox, or Codebook for Windows/OS X to Codebook
Important Preferences
Accessing Settings

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

iPad:
3. Tap Settings in the Side Navigation Pane
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
Touch ID

1. Settings
2. Login Settings
3. Flip the “Enable Touch ID Login” switch on
4. Codebook will prompt you for your fingerprint at the login screen

Touch ID Fingerprint Authentication is available on iOS only
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. Use Timer, Lock after
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. Settings
2. Preferences
3. Enable autocorrect
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