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
- macOS
Security

256-bit AES encryption

Peer-reviewed storage engine

Protection:

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

Setup your Master Password on first use

It’s required each time you access vault

Your Master Password is used to encrypt your data. 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 retrieved from Codebook ***
Welcome

1. Toolbar
2. Search
3. Category List
4. Entry List
5. Entry View
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 (or shift+⌘+N)
2. Enter a descriptive name
3. Choose an Icon
4. Click Save
Create an Entry

1. New Entry (or ⌘+N)
2. Enter Descriptive Name
3. Choose Icon
4. Add Fields
   a. Choose Label
   b. Enter field value
5. Click the “Favorite Star” to mark important records as Favorites
6. Save changes
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 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 Entry (or option+⌘+N)
2. First line becomes title
3. Multi line text content
4. Save note

SEARCH WITHIN A NOTE:
Enter the search criteria in the search bar at the bottom of the note. The first occurrence will be highlighted. Hit return to move to the next occurrence.
Deleting records

1. Delete category (and all entries)
2. Delete entry (and all fields)
3. Delete field:
   a - Edit
   b - Click minus

Be careful not to lose information, these operations cannot be undone.
Categories

Navigate through your own custom organization structure

1. Choose a Category from the navigation area
2. Choose an Entry to view

Categories and Entries are sorted alphabetically
Favorites

Entries marked with the Favorite star are quickly accessible

1. Click on Favorites
2. Click on an Entry
Search

Quick retrieval of information based on keyword:

1. Enter search criteria
2. Choose Entry to view

Entry names and all field values are included in search.
Copy / Paste

Data can be copied to the clipboard

1. Click on Field to be copied
2. Click the copy button -or- type ⌘+C
3. Paste into another app with ⌘+V

The clipboard is managed and fields you copy will be cleared automatically.
Secret Agent

Global keyboard shortcut to launch Codebook search from any app

Insert data into an active text field (e.g. a website password in your browser)

Available on Desktop Only
Use

1. Press OPTION+⌘+
2. Enter search term
3. Use up and down arrows or mouse to navigate results
4. Press return to select a search result
5. Arrow down or up to select a Field (like Password)
6. Press return to enter value to active text field in another app

Tip: Favorite entries will sort to the top in Secret Agent.
Synchronization
Synchronization

Codebook can keep data in sync across multiple devices.

Changes made on any device can be merged.

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

Types of Syncing:
1. Cloud Service
2. Desktop WiFi
Initial Sync Key Setup

These are the steps to generate a Sync Key. A sync Key is only generated once and the same key is used for all of your devices.

When Codebook is first setup, you will be asked “Do You Already Use Codebook?

Since this is your initial setup of the sync system

1. Select ‘No, setup sync for a new database’
2. ‘Choose Sync Service’ from the list (Desktop WiFi, Dropbox or Google Drive)
3. Click Continue

** A new Sync Key is generated only once and imported to other devices. *
Initial Sync Key Setup

Since this is your initial Codebook setup

Click No to generate your Sync Key

Your new Sync Key will be generated

** There is only one Sync Key that is used for ALL of your 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.

There are two 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

** write your Master Password**
Import an Already Existing Sync Key

When Codebook is first setup, you will be asked "Do You Already Use Codebook?"

If you want to sync your device with Codebook data from another device

1. Select ‘Yes, I want to restore my data’
2. ‘Choose Sync Service’ from the list (Desktop WiFi, Dropbox or Google Drive)
   This should be the same service you are already using
3. Click Continue

** There is only one Sync Key that is used for ALL of your devices. **
Import an Already Existing Sync Key

1. Since you already have a Sync Key, click Yes and you will be prompted to scan your Sync Key.

To import your existing Sync Key from another device:
From the desktop app - select Sync menu > Add a Device From the mobile app - Sync View > Add a Device
This will display a QR code containing an encrypted representation of your Sync Key.

2. Click Scan Sync Key and scan the displayed QR code to store it in 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. **
Set Up Sync with another Device

- Scan the QR code using your computer's camera
- Enter the Master Password that was used when the Sync Key was created
- Click Submit
Set Sync Preference

1. Select Codebook > Preferences

2. Select radio button of preferred sync method, either Desktop WiFi (sync on local WiFi network), Dropbox, Google Drive, or Local Sync Folder (local folder on your machine)

When syncing to Dropbox or Google Drive, you will need to authenticate to the app once and the settings will be saved

Desktop WiFi sync is initiated from the iOS or Android device

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.
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.

Each device must be synced to ensure they are all synchronized.

Syncing is done with one Cloud Service at a time.

Sync is triggered on each device on demand.

Changes are merged in the central copy on the Cloud.

Desktop

Cloud Service

Mobile

How to sync using a Cloud Service

1. Tap the Sync button
2. Sign in to your Google Drive or Dropbox account to authenticate
3. Sync will proceed after authorization

Tip: Sync periodically to keep your data in sync across your devices.
Cloud Service Sync example

**Computer**

1. Add a new entry in Codebook Desktop
2. Start Sync
3. Changes copied to Cloud Service

**Mobile Device**

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

9. Start Sync
10. Mobile changes merged from Cloud Service to Codebook Desktop
Sync Using Desktop WiFi

WiFi Sync will merge new data and updates on both the desktop app and the mobile device.

Both devices must have the same Sync Key.

WiFi Sync is started on the mobile device.

Both devices must be connected to the same WiFi network to be able to sync.
Customize Labels

Add new custom labels

Customize behaviors

Enable masking

Available under File -> Customize Labels (or ⌘+L)
Autolock

Leaves application unlocked for a designated period of time (default 5 minutes)

Automatically locks application when timer expires

Allows more convenient access without repetitious logins

Tip: Be careful; when autolock is enabled your data is exposed.

Available under Codebook menu -> Preferences -> Locking
Data Detection

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

1. Allow data detection in notes:
   Codebook menu -> Preferences -> General

2. When in edit mode and hovered over by the cursor, a dotted box with a drop down menu arrow will appear around data that can interact. Click on the arrow to show the available options.

Examples:
Dates, Flight Numbers, Addresses, Email, Websites, Phone Numbers
Clipboard clear

Codebook automatically wipes secrets from the system clipboard after 2 minutes.

Available under Codebook menu -> Preferences -> General
Password Review

When the Preference is set, you can review your passwords with Have Been Pawned.com. The review will take place as a new password is entered.

You can also review a password on an existing entry:

1. Right click on a password field. The Password Options Menu will be displayed.
2. Click Review Password. Codebook will let you know if any breaches have been found.

OR

Use the Keyboard Shortcut - ⌘⇧R
To perform Password Review
On Preferences Menu, check “Enable Secret Agent with keyboard Command”

Click the “Choose User Scripts Folder” button

Codebook will choose the correct folder, simply click “Choose User Scripts Folder” again

Choose the key sequence to launch Secret Agent
Password Change

Available under Codebook menu -> Change Master Password
Magnify a Field

Review password on an entry:

1. Right click on a field. The Field Options Menu will be displayed.
2. Click Magnify.
3. The value of the field will be displayed in a large font.
   Codebook will let you know if any breaches have been found.

OR

Use the Keyboard Shortcut - ⌘ + M + R
To perform Password Review