Codebook

Codebook for macOS
Introduction and Usage - Release 5.0

Codebook

What is Codebook

Encrypted Data Vault

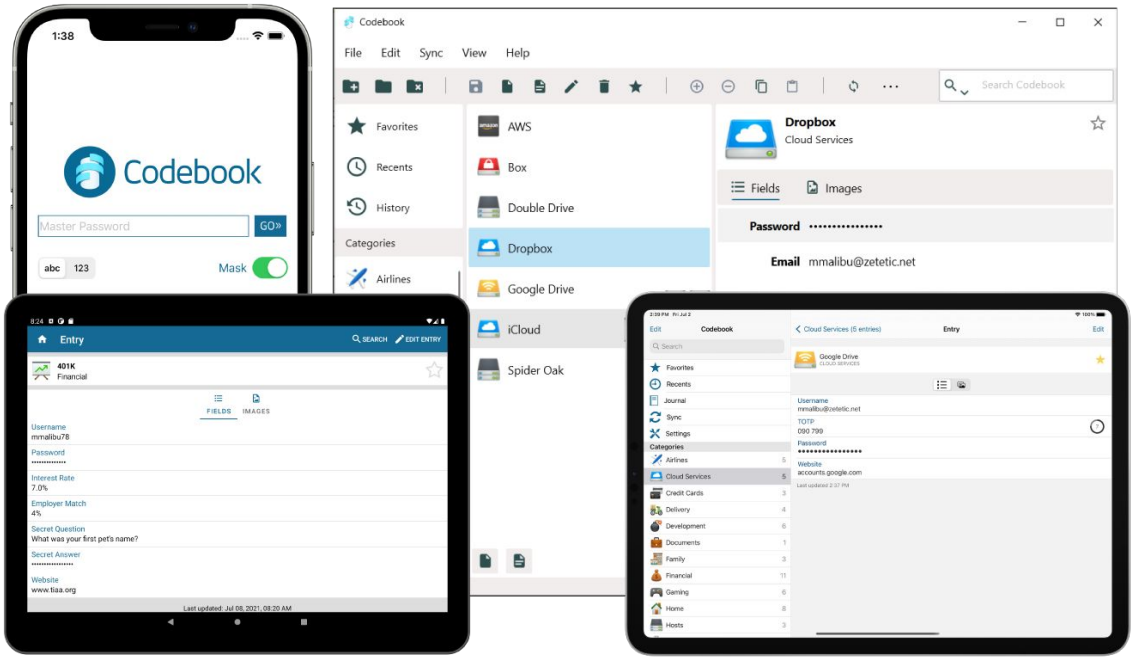
Guards passwords and private data

Keeps sensitive information organized

Enables quick recall of secrets

Syncs data across multiple devices automatically or on demand

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



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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

Codebook

Getting Started

Codebook

Master Password

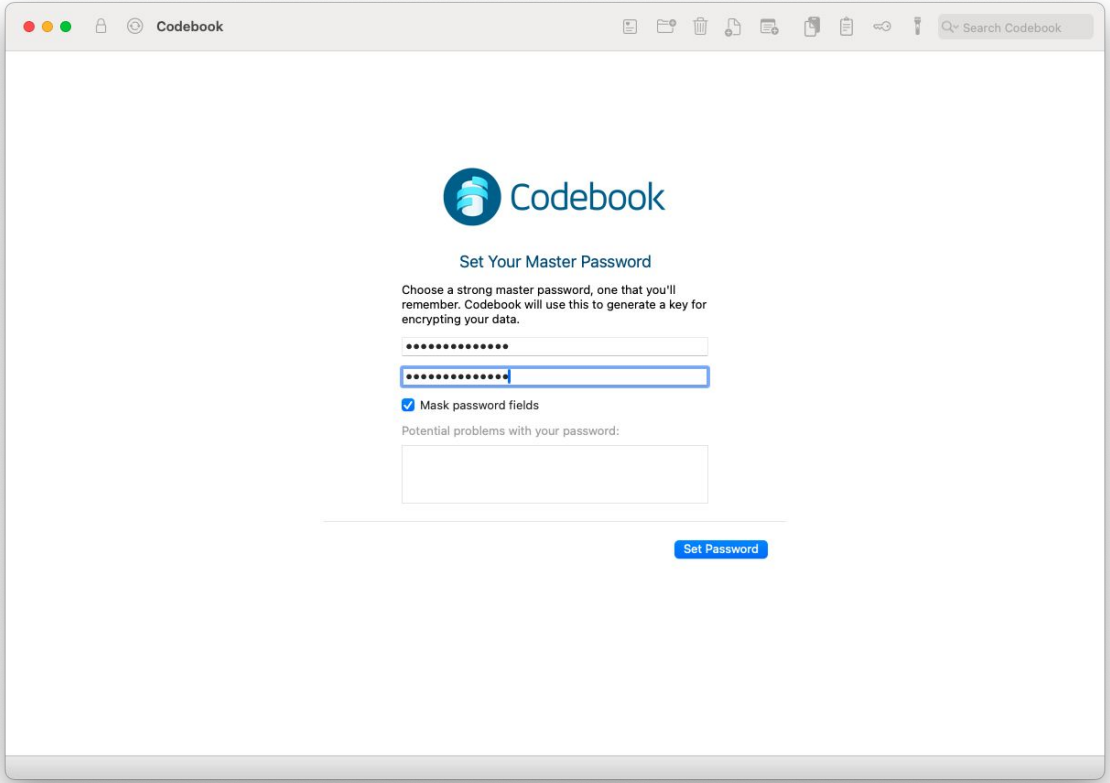
Setup your Master Password on first use

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

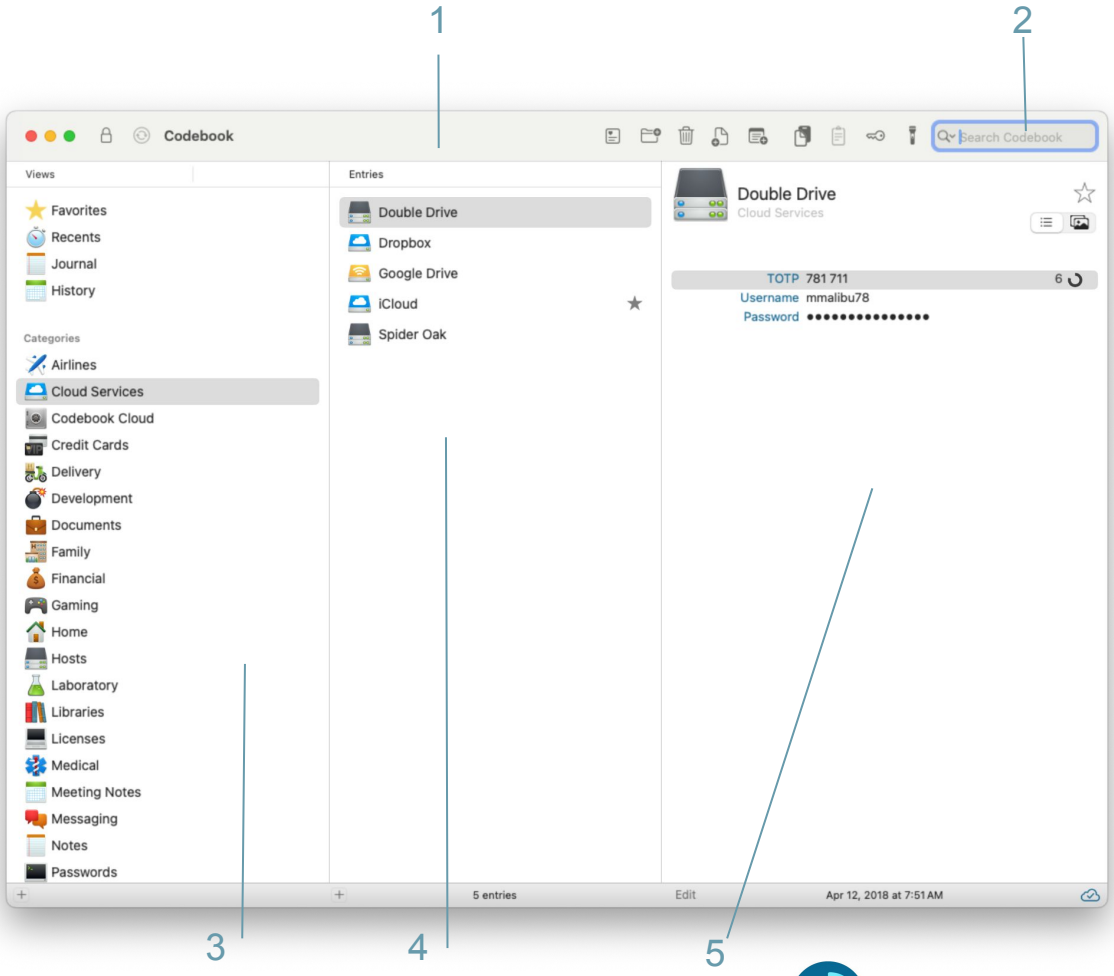
*** You must remember your Master Password. It cannot be of Codebook ***



Codebook

Initial View Layout

1. Toolbar
2. Search
3. Category List
4. Entry List
5. Entry View



Codebook

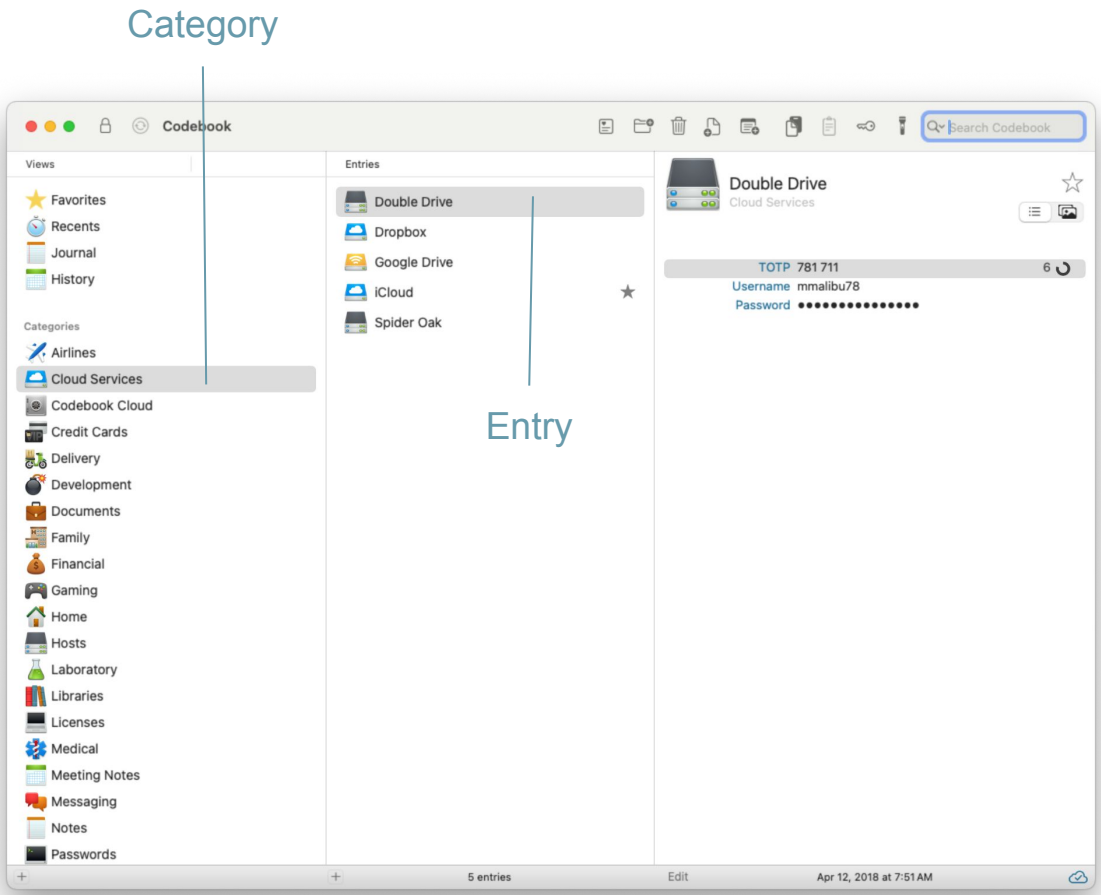
Data model

Category

- Groups records
- Navigation-based retrieval

Entry

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



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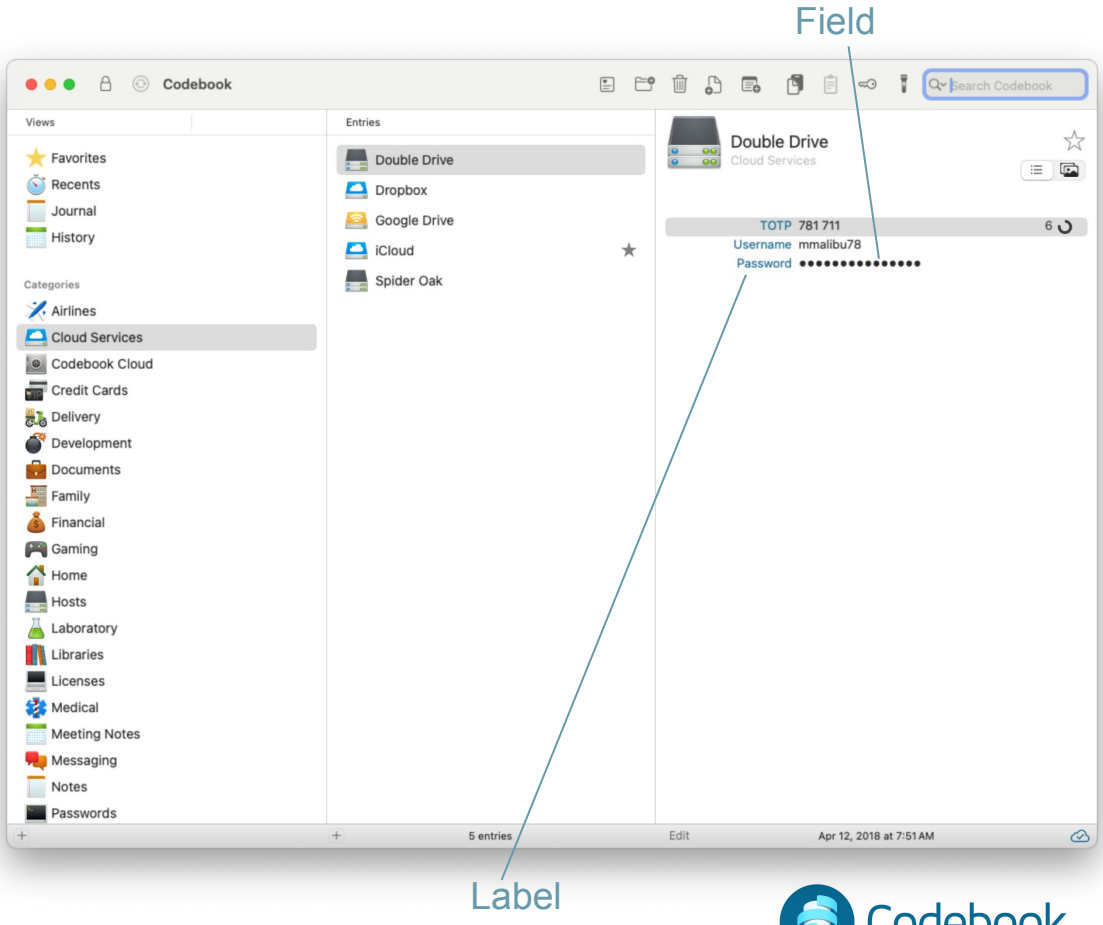
Data model

Fields

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

Labels

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



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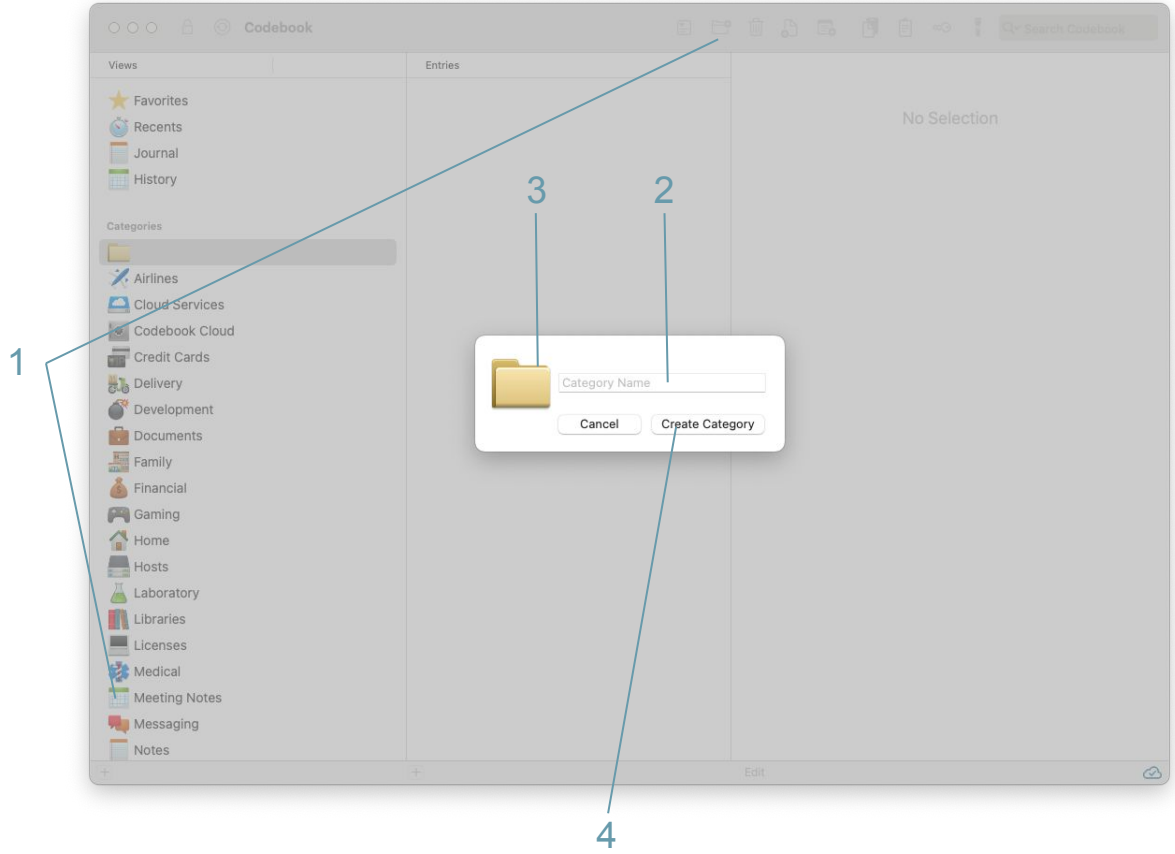
Create a Category

1. New Category (or shift+⌘+N)
2. Enter a descriptive name
3. Choose an Icon
4. Click Create Category



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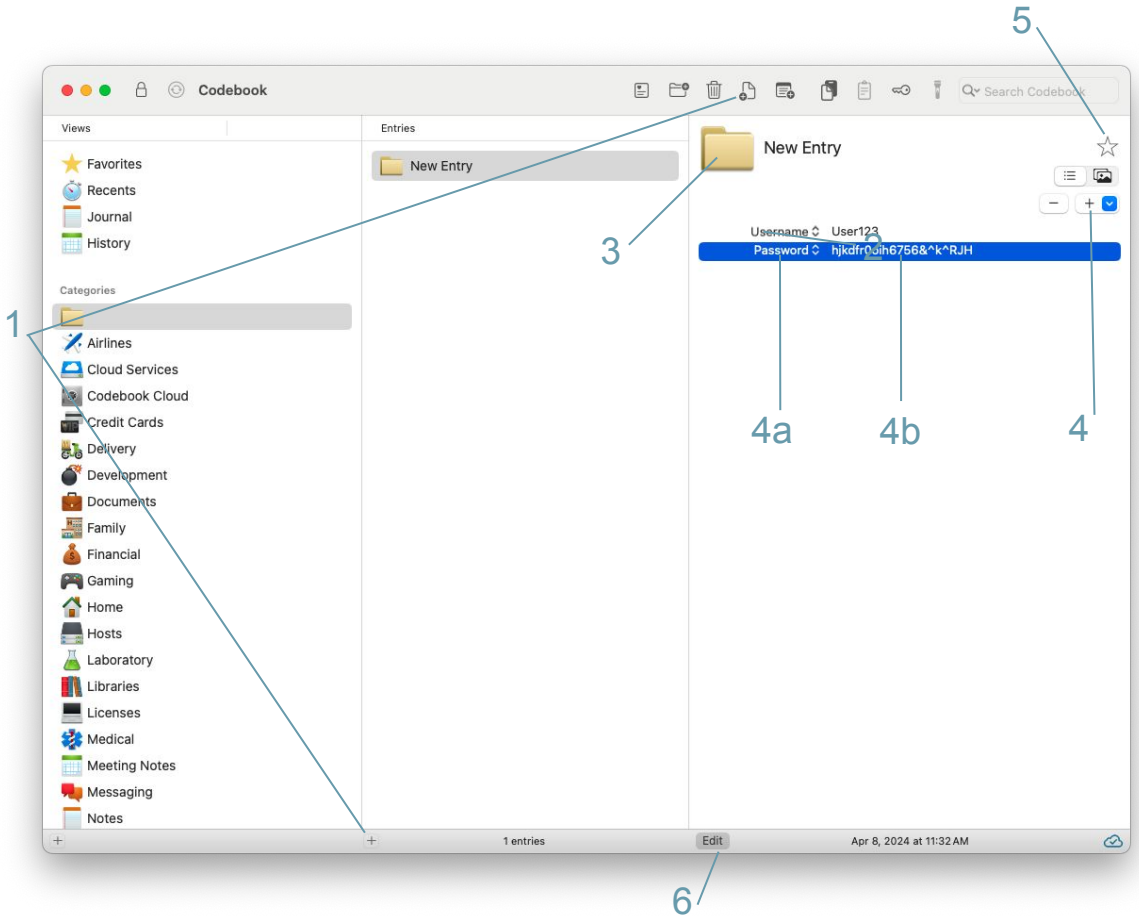
Create an Entry

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 entries as Favorites
6. Click “Edit” to Save changes



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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
- 2-Step Code
  - Generates time-based one time passwords (e.g. for Google 2-step)

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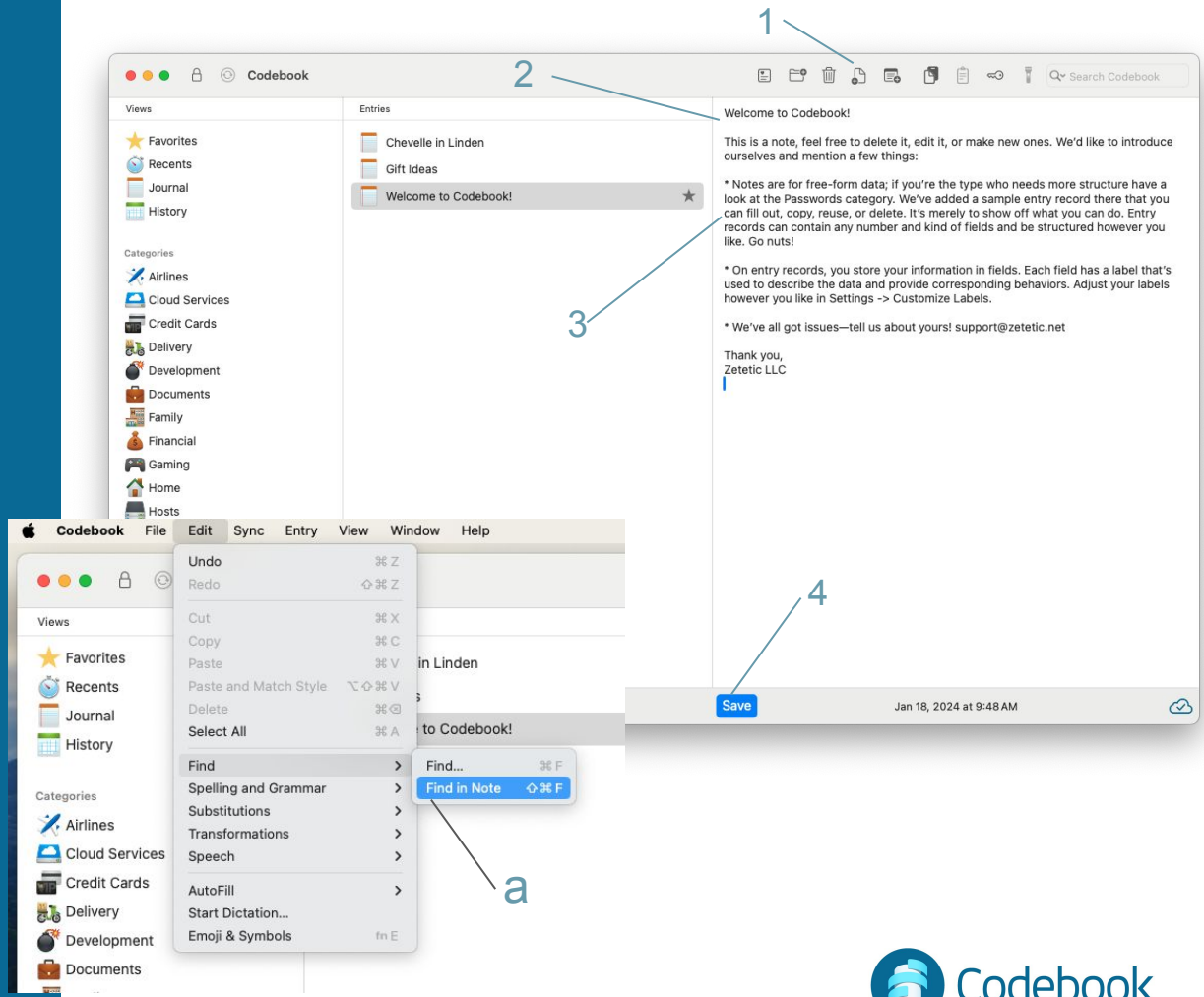
Create a Note

1. Add Note Entry (or option+⌘+N)
2. First line becomes title
3. Multi line text content
4. Save note

SEARCH WITHIN A NOTE:
There are 2 ways to activate search:
a - Edit -> Find -> Find
b - Shift + ⌘ + F
Enter the search criteria in the search bar. The first occurrence will be highlighted. Hit return to move to the next occurrence.



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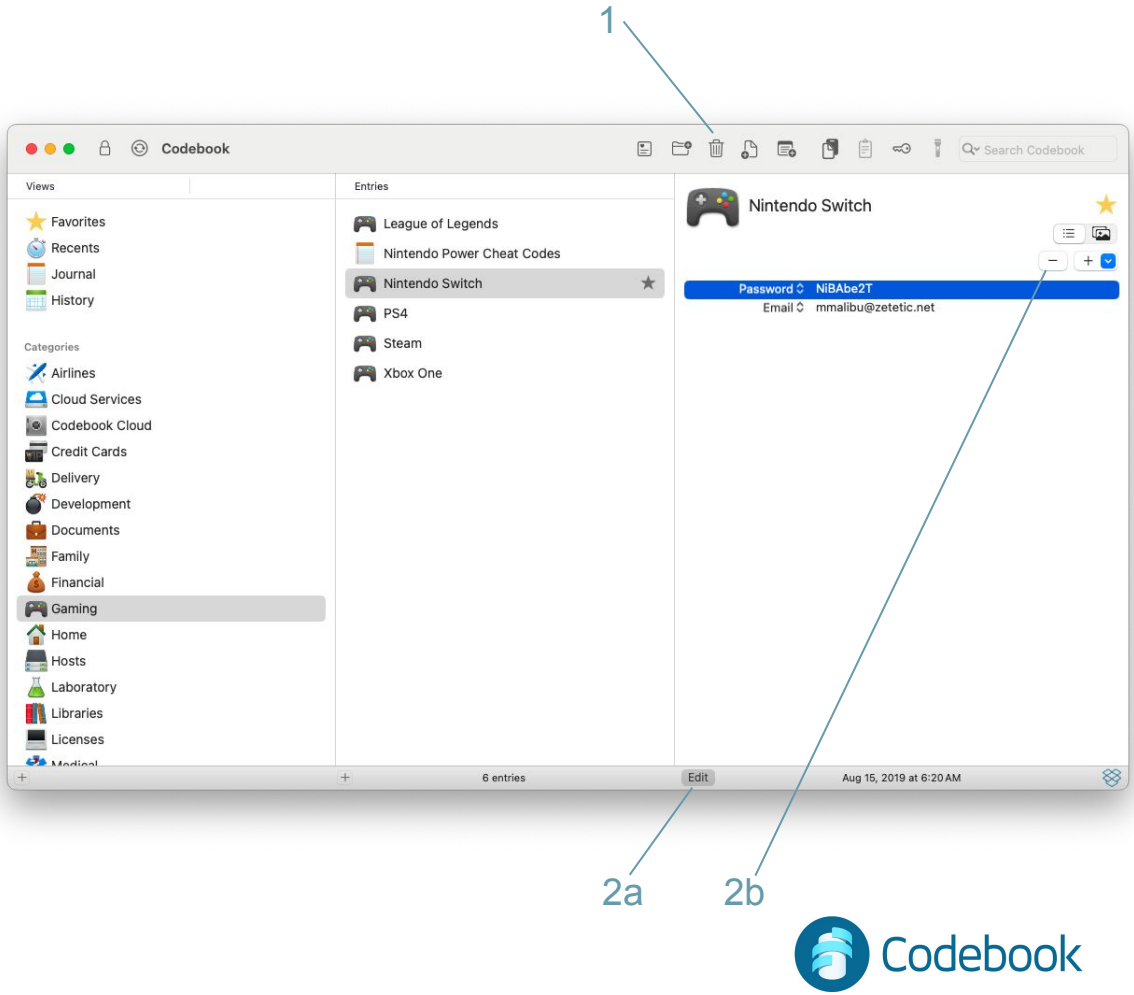
Deleting records

1. Delete selected category or entry
   (Deleting a category also deletes all entries)
2. Delete field:
   a - Edit
   b - Click minus

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



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Navigation and Retrieval

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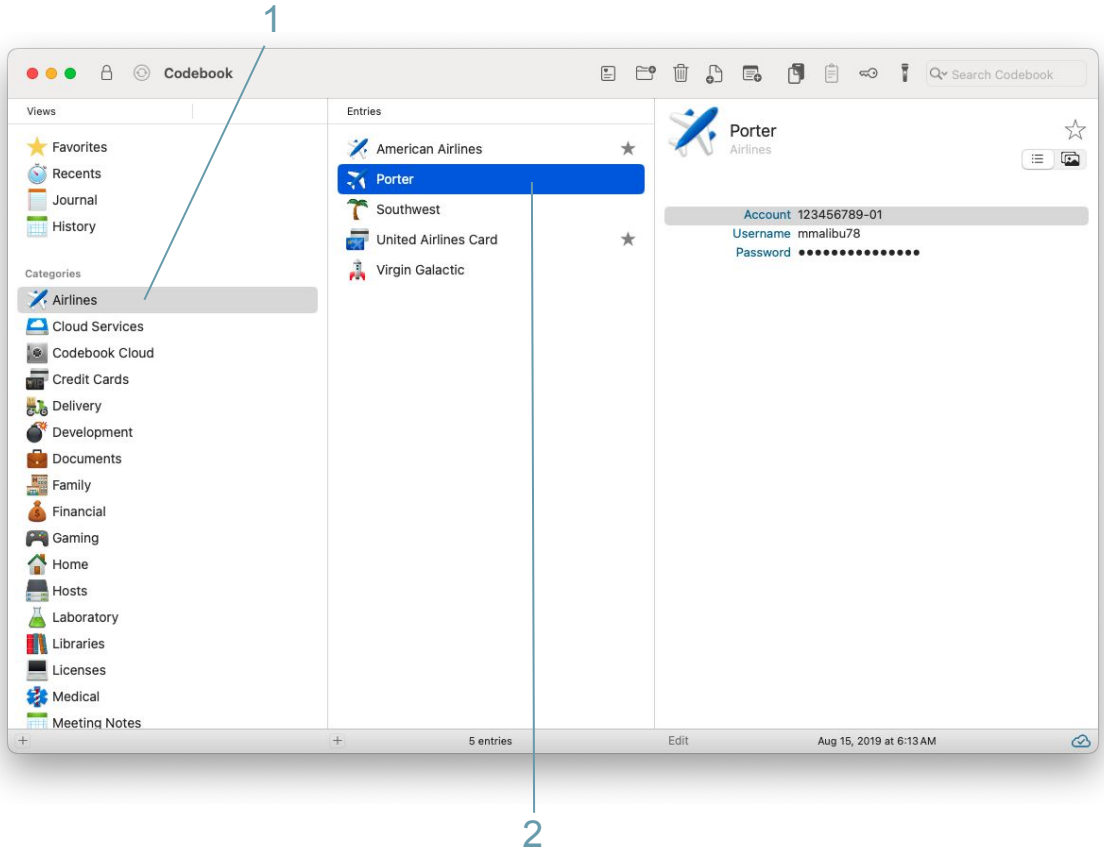
Categories

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



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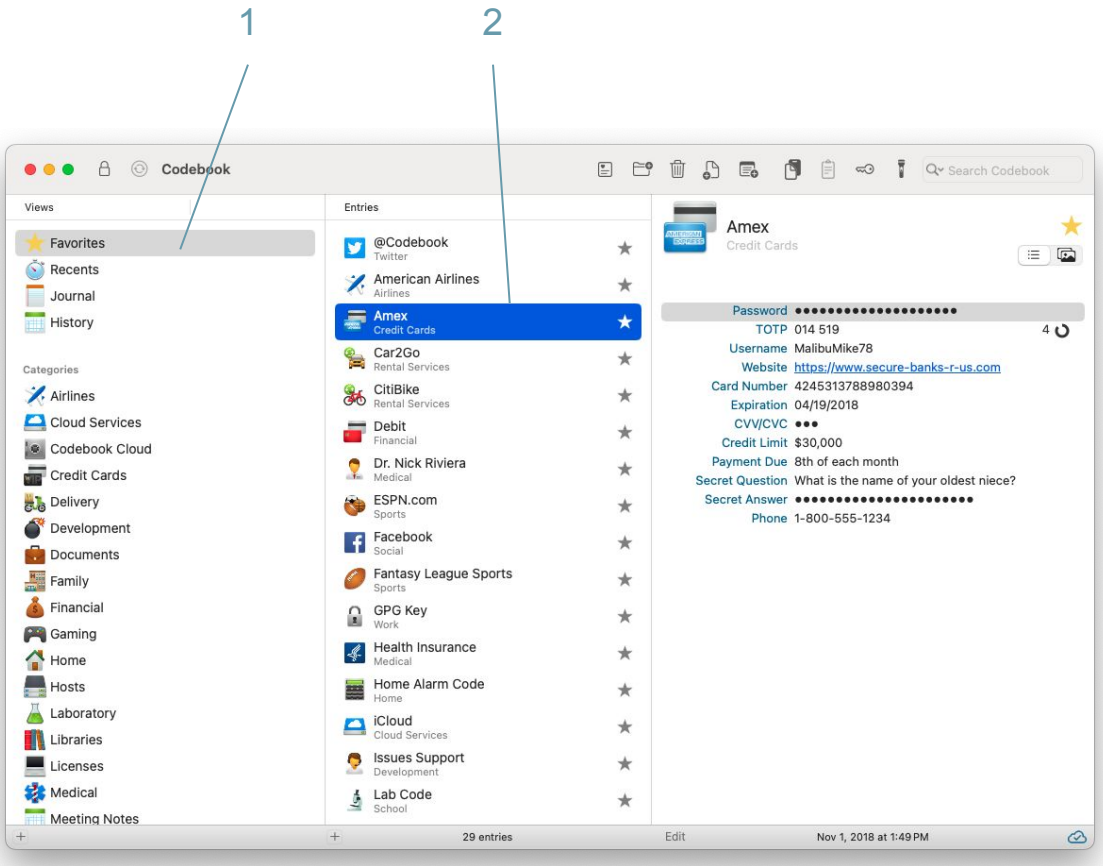
Favorites

Entries marked with the Favorite star are quickly accessible

1. Click on Favorites
2. Click on an Entry



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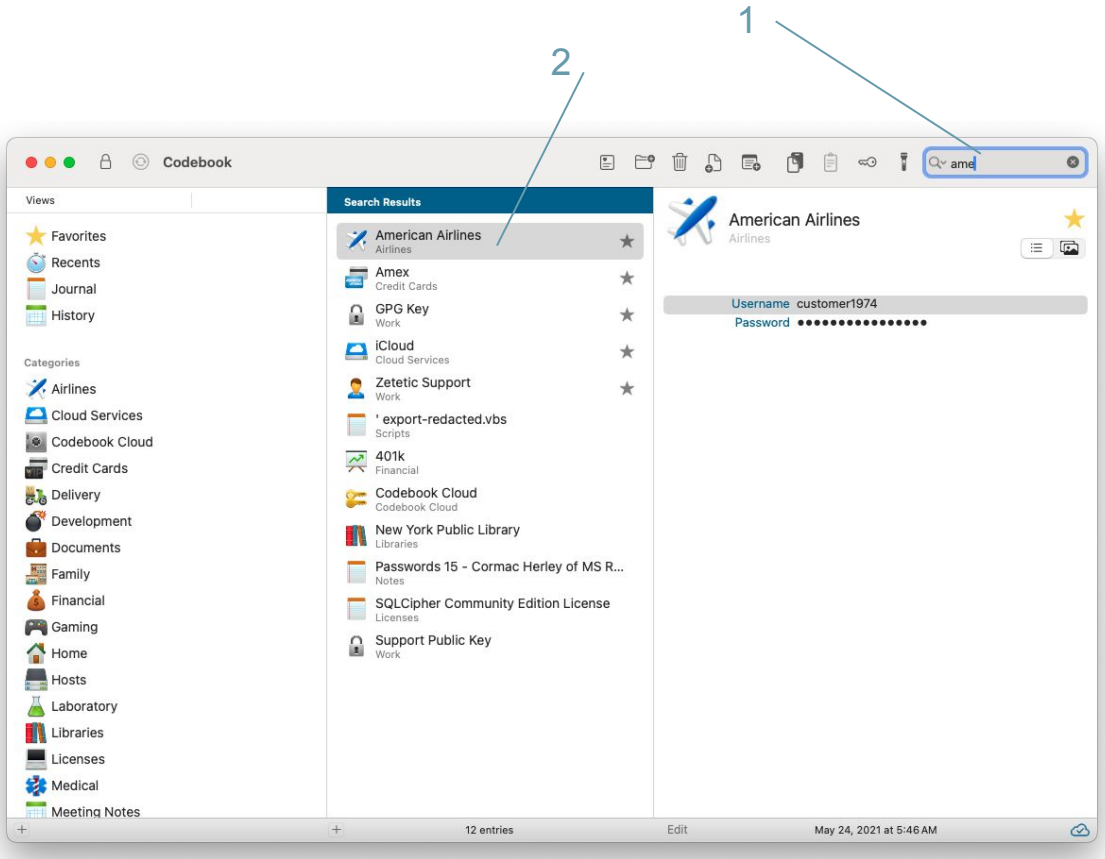
Search

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.



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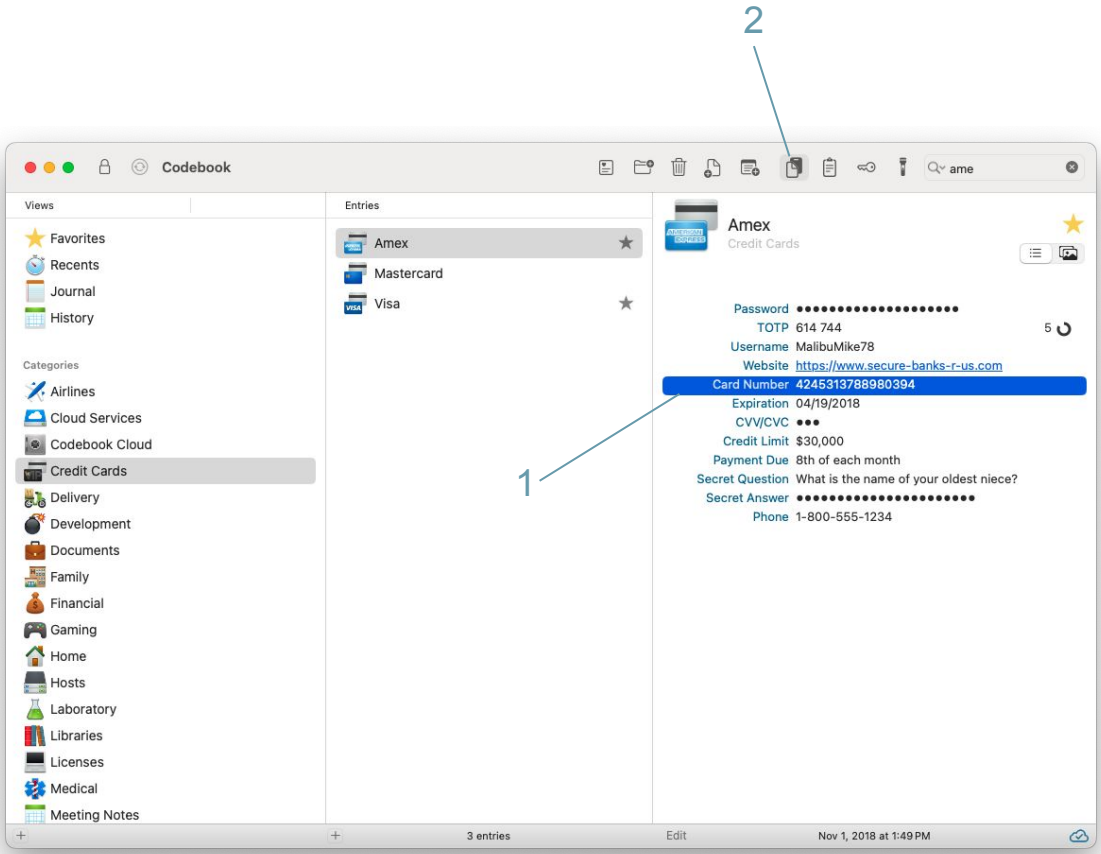
Copy / Paste

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.



Codebook

Secret Agent

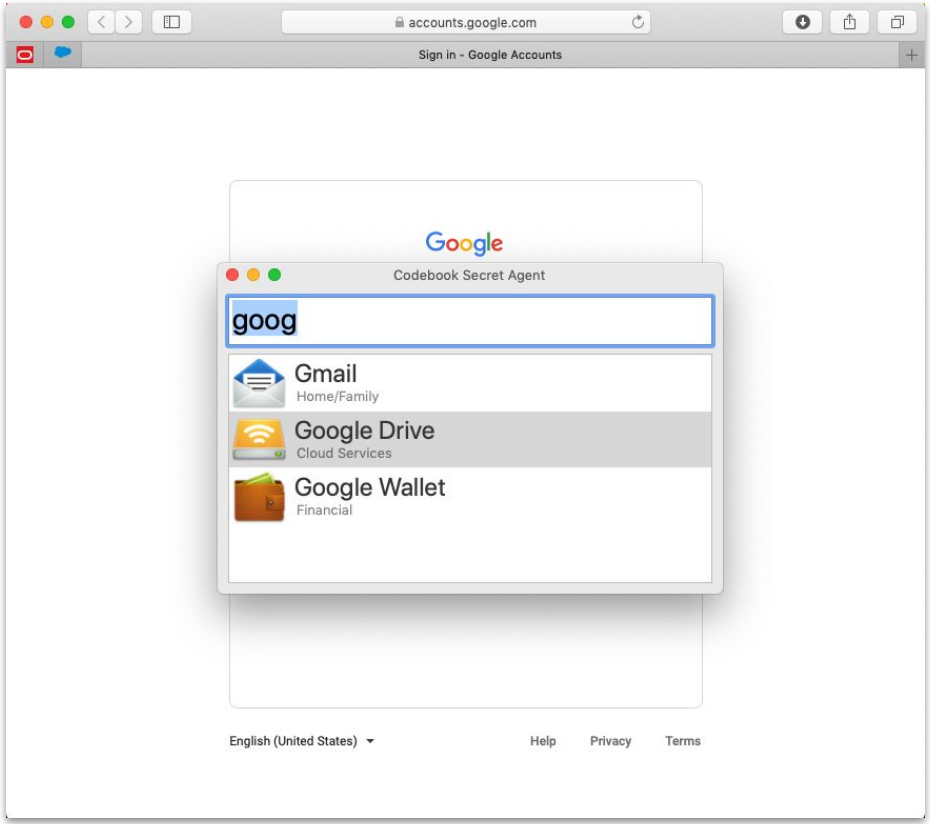
Codebook

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



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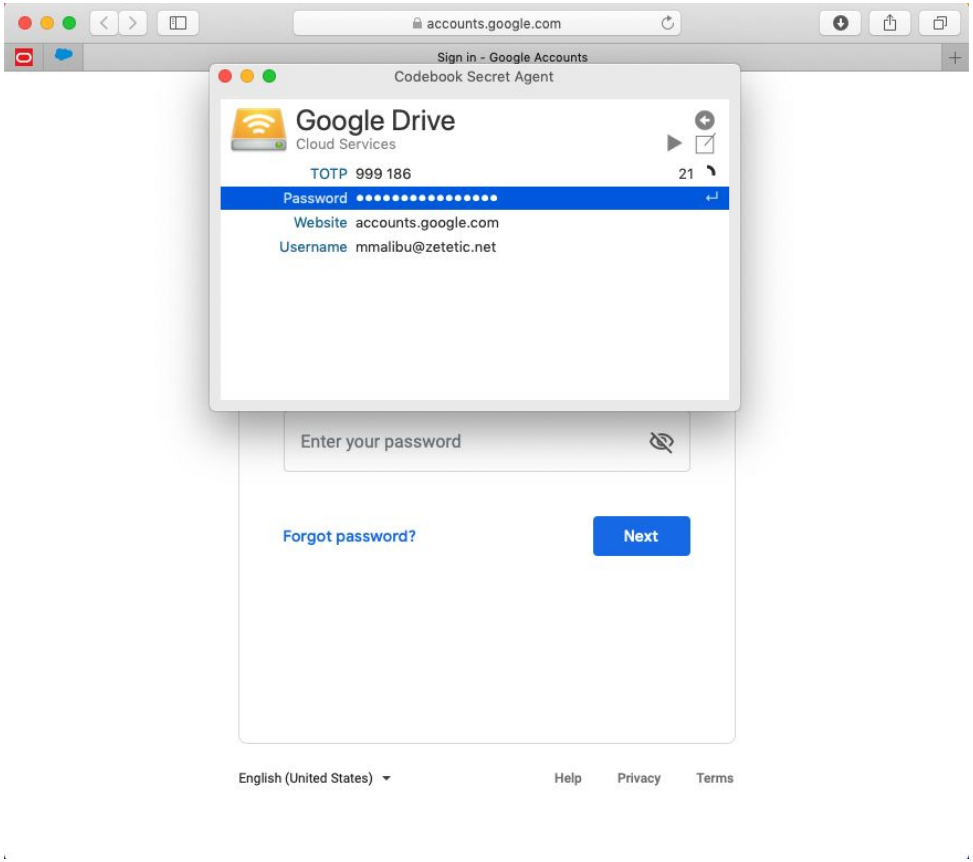
Use

1. Press SHIFT + CMD + \
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.



Codebook

Synchronization

Codebook

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.

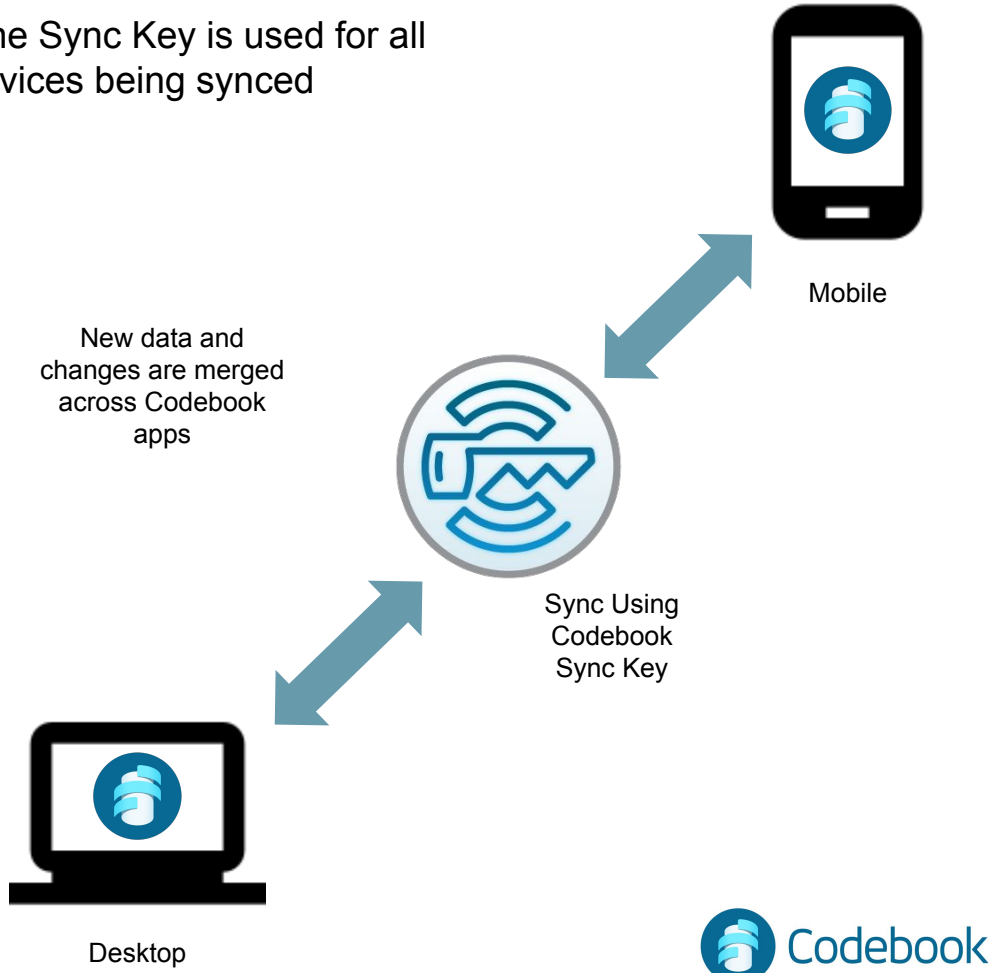
You select the method to be used to sync your devices.

Types of 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



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Create Codebook Cloud Account

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

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

During Installation:

1 - Enter your email

2 - Click continue then follow instructions

OR

After Installation from Sync Preferences:

1 - Codebook -> Settings

2 - Sync tab

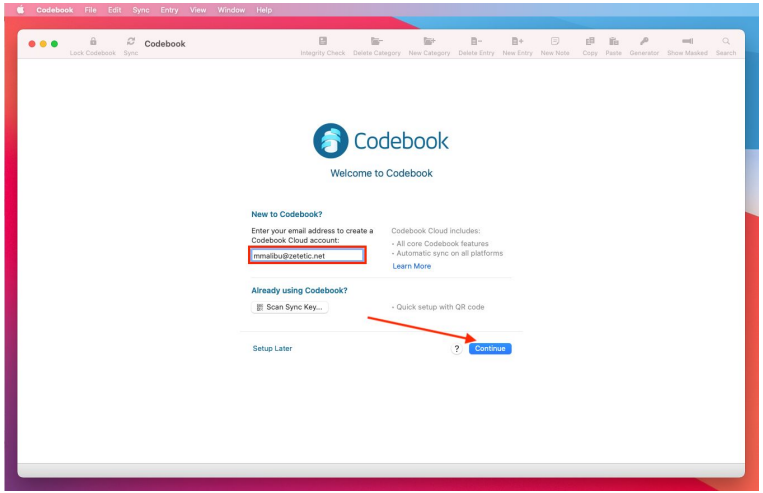
3 - Sync Service - Codebook Cloud

4- Automatically Sync with Codebook Cloud

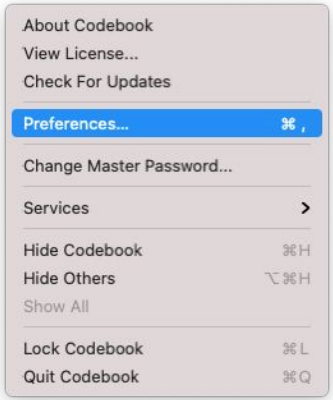
5 - Click Sign In then follow instructions

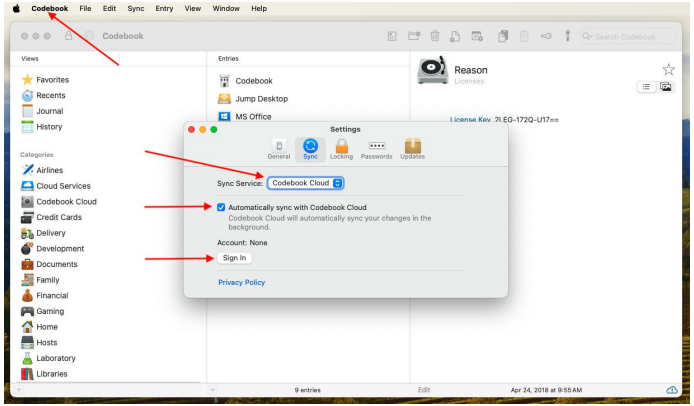
For More Info:
https://www.zetetic.net/codebook/documentation/create-codebook-cloud-account/?platform=macos

During Installation:



From Codebook Settings:





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Initial Sync Key Setup

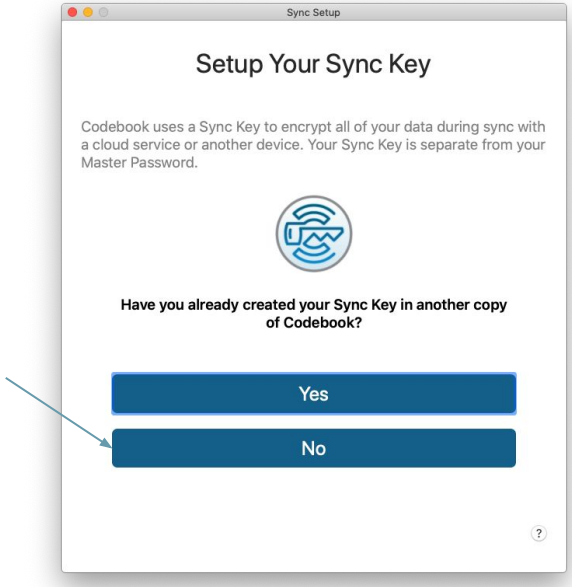
If you created a Codebook Cloud account during installation, your Sync Key has already been created.

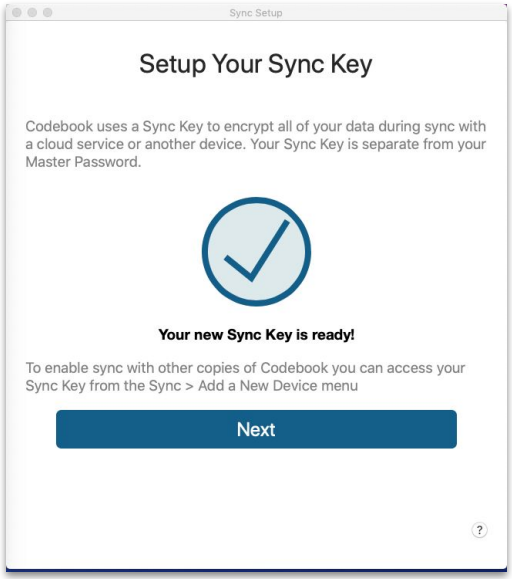
If you need to create a Sync Key, select Setup Sync Key from the Sync Menu

Since this is your initial Codebook setup:
Click No

Your new Sync Key will be generated

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





Codebook

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

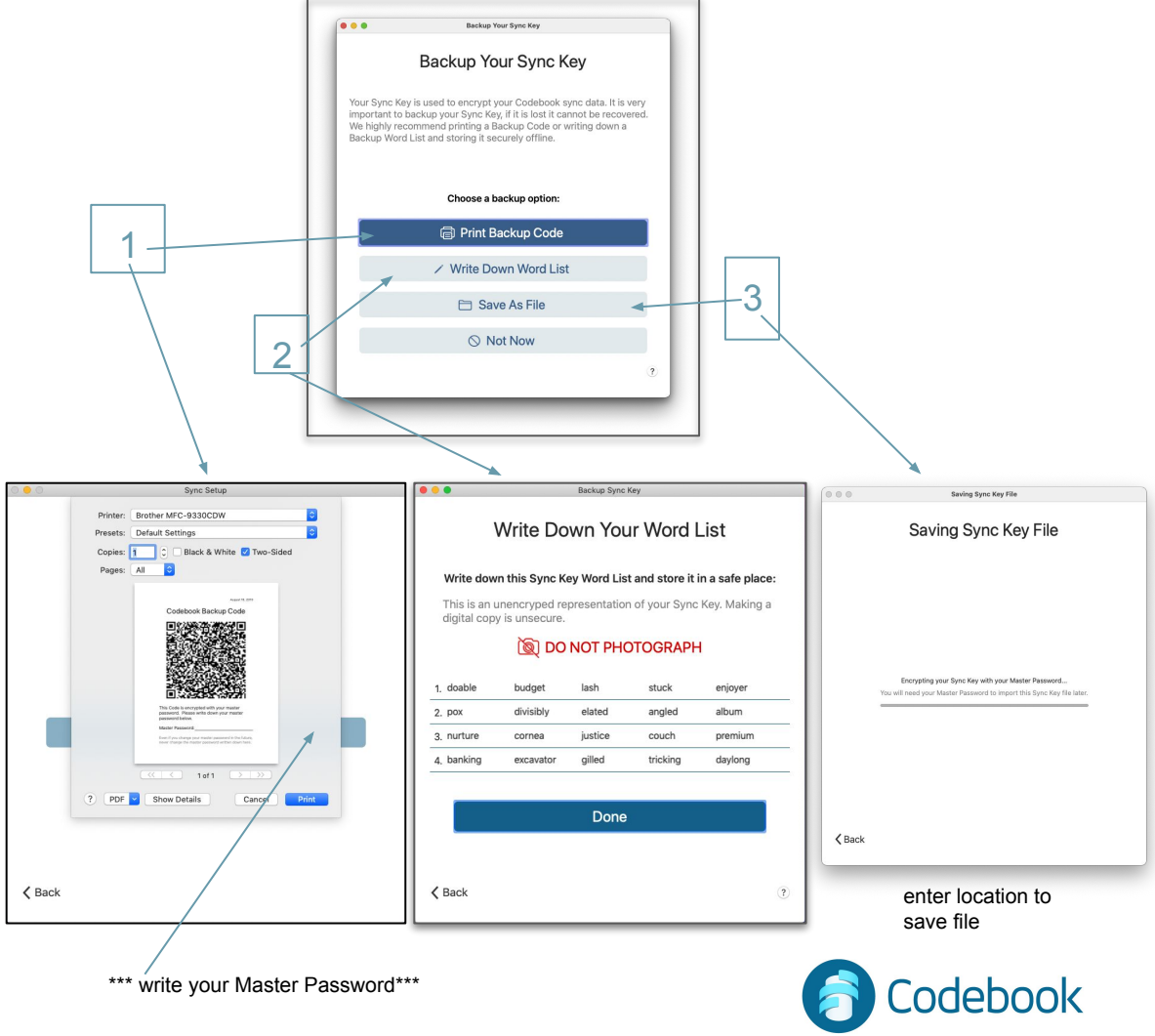
*** Be sure to write down your Master Password of the device generating the backup in the space provided ***

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



*** write your Master Password***

enter location to save file

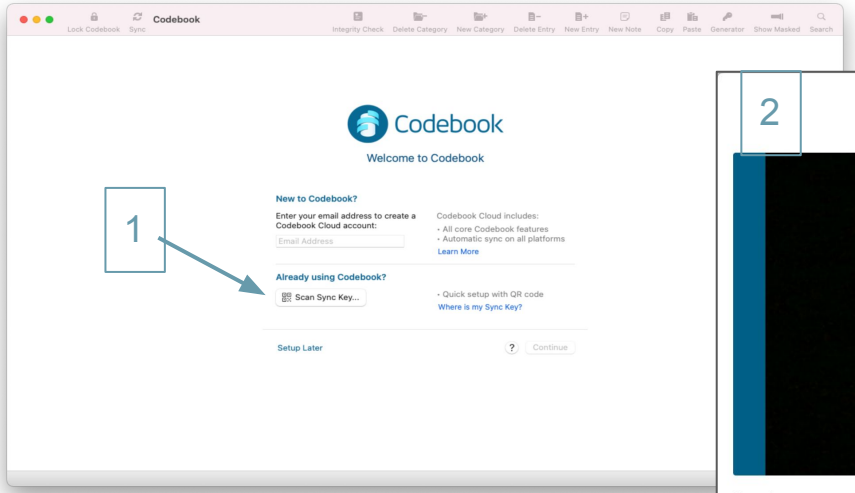
Codebook

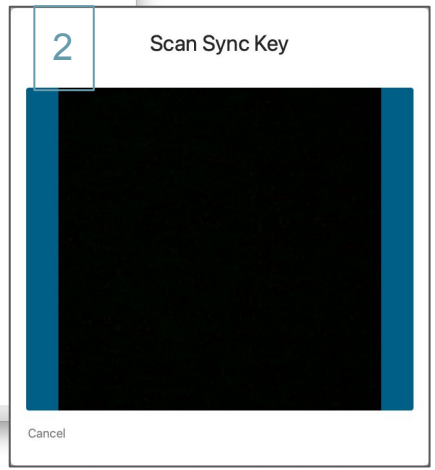
Import an Already Existing Sync Key **During Installation**

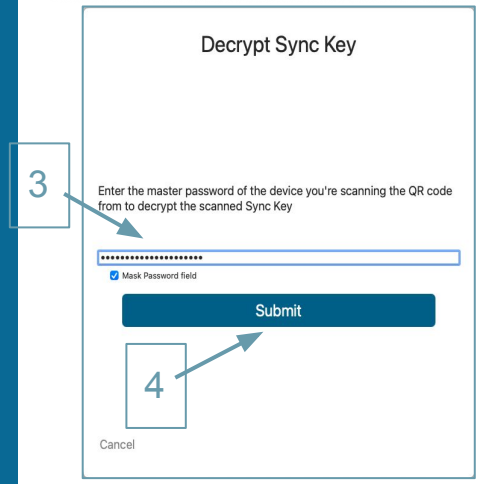
During initial setup, you will be given the option to Scan your Sync Key

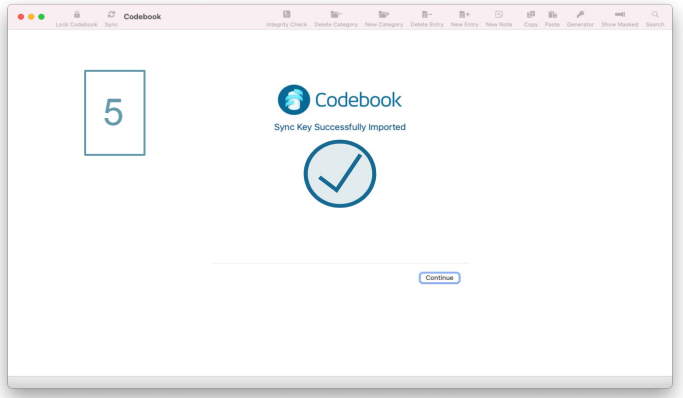
1 - Click Scan Sync Key
2 - Scan Backup QR Code
3 - Enter Master Password for Sync Key
4 - Click Submit
5 - Confirmation of Successful Import

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









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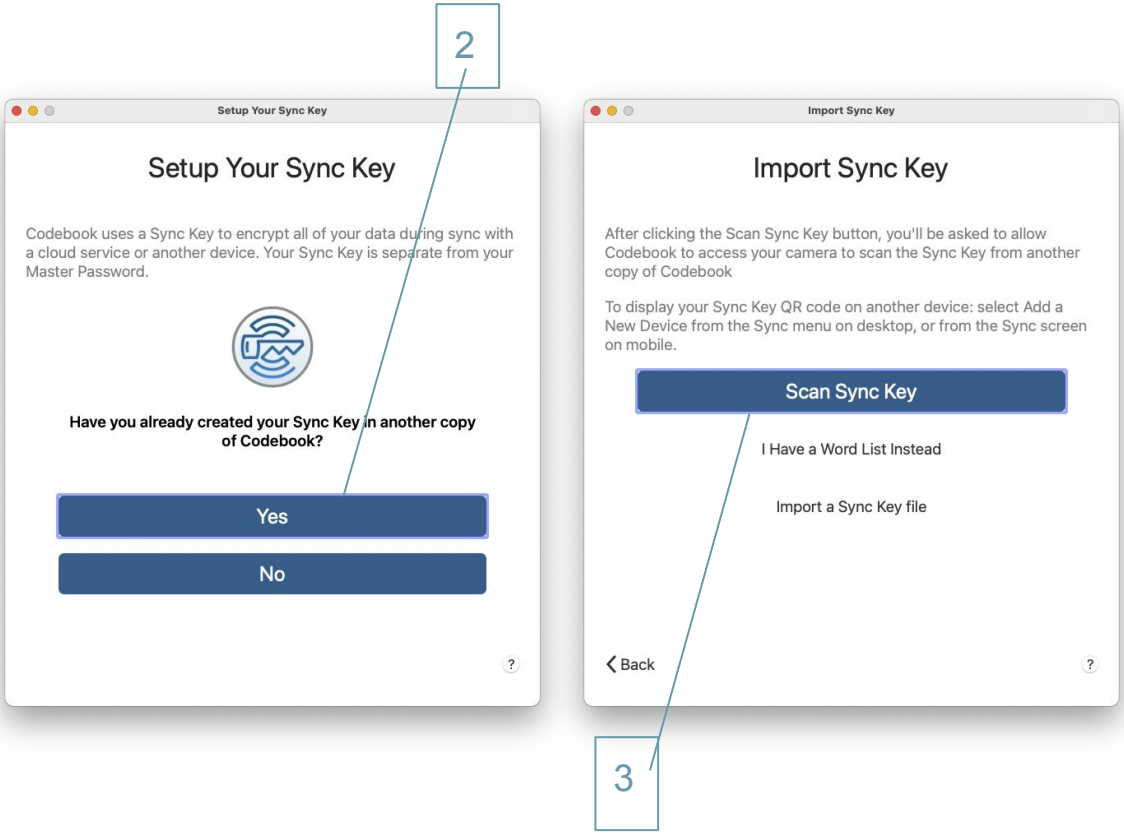
Import an Already Existing Sync Key

1. From the Sync Menu, tap Setup Sync Key
2. 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 you can scan it from another device or from a printed copy.
To Display Sync Key from the desktop app:-
Sync menu > Add a Device
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 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. **



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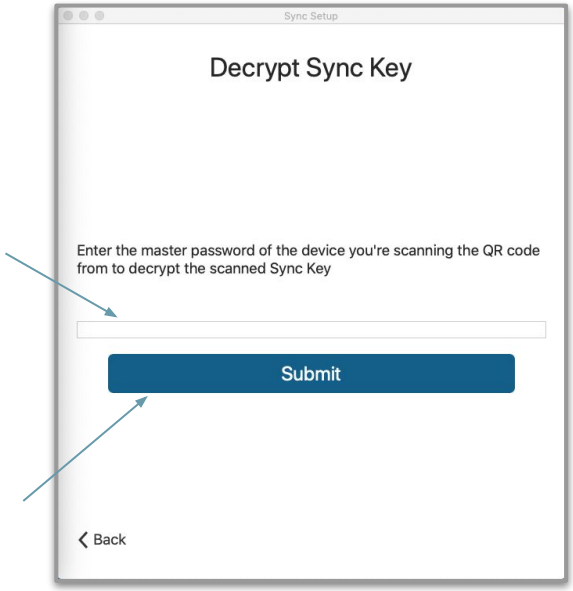
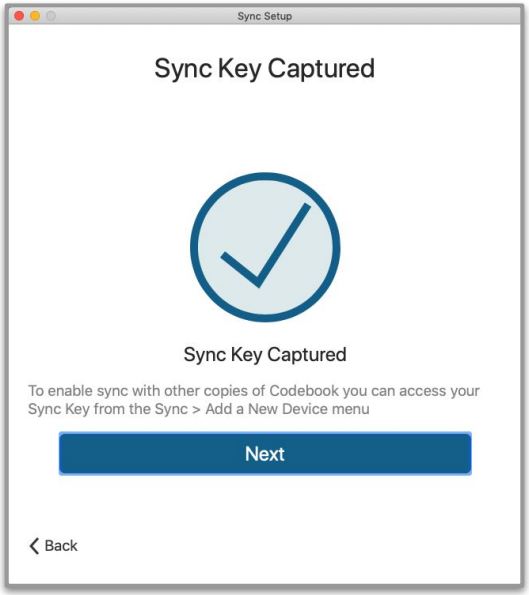
Import an Already Existing Sync Key
(continued)

Scan Sync Key:

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





Codebook

Import an Already Existing Sync Key
(continued)

Enter Word List to Import Sync Key

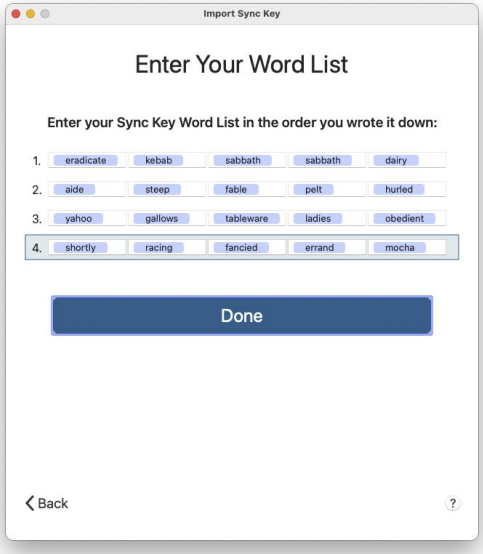
- Enter the 20 words in the Word List in order
- Click Done

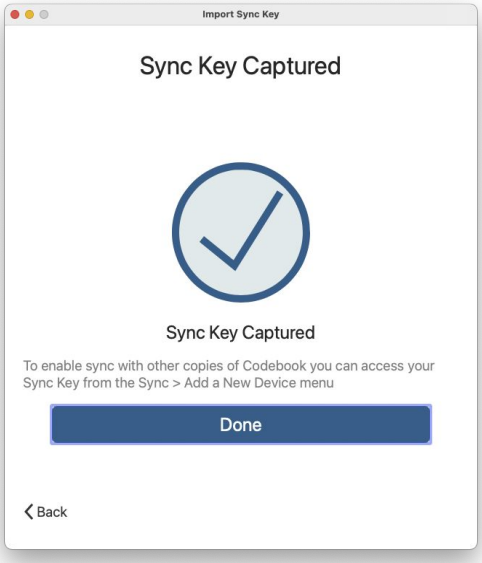
Import Sync Key File

If you select the Import a Sync Key file option, you will be prompted to select the location of the file *
- Click Import Sync Key

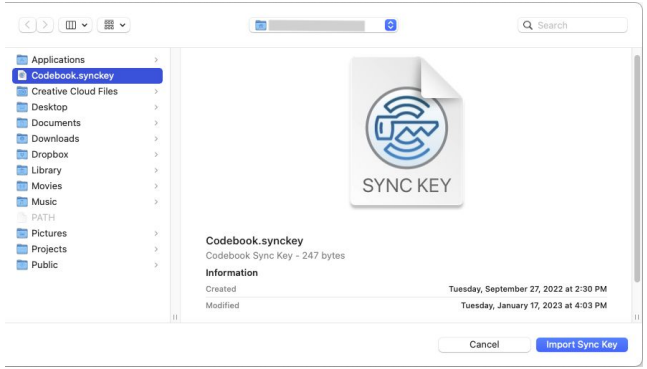
* the file was created with the name Codebook.synckey

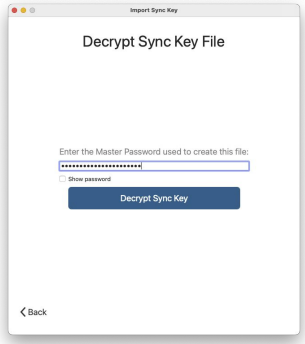
Word List:





Import File:





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Set Sync Preference

1. Select Codebook -> Settings

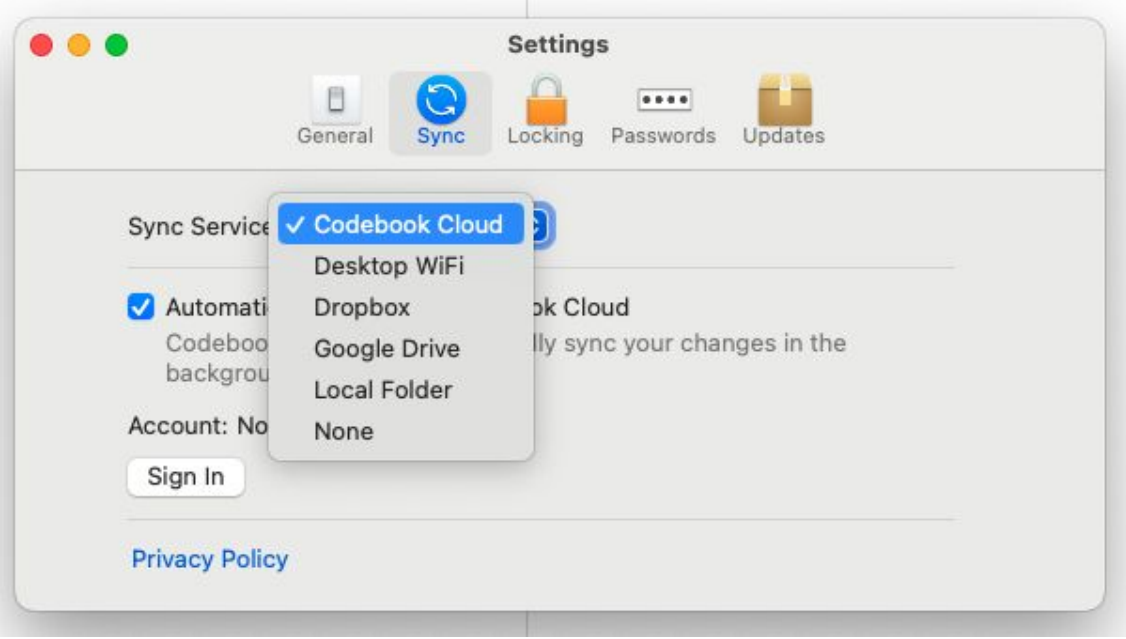
2. Select your Sync Service from the drop down list.

SYNC NOTES:
You need a Codebook Cloud subscription to automatically sync your devices

Authenticate with the service once and allow Codebook to link to your personal cloud account

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.



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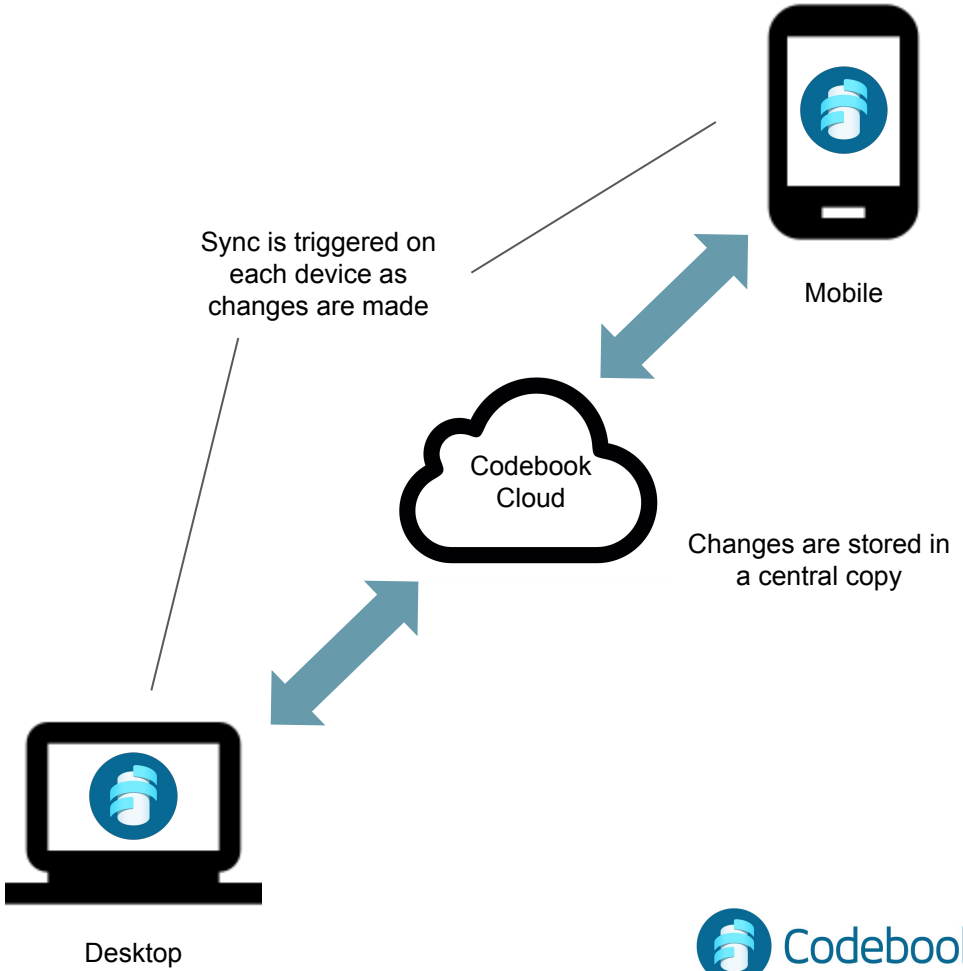
Codebook Cloud Synchronization

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 **



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Cloud Service Synchronization

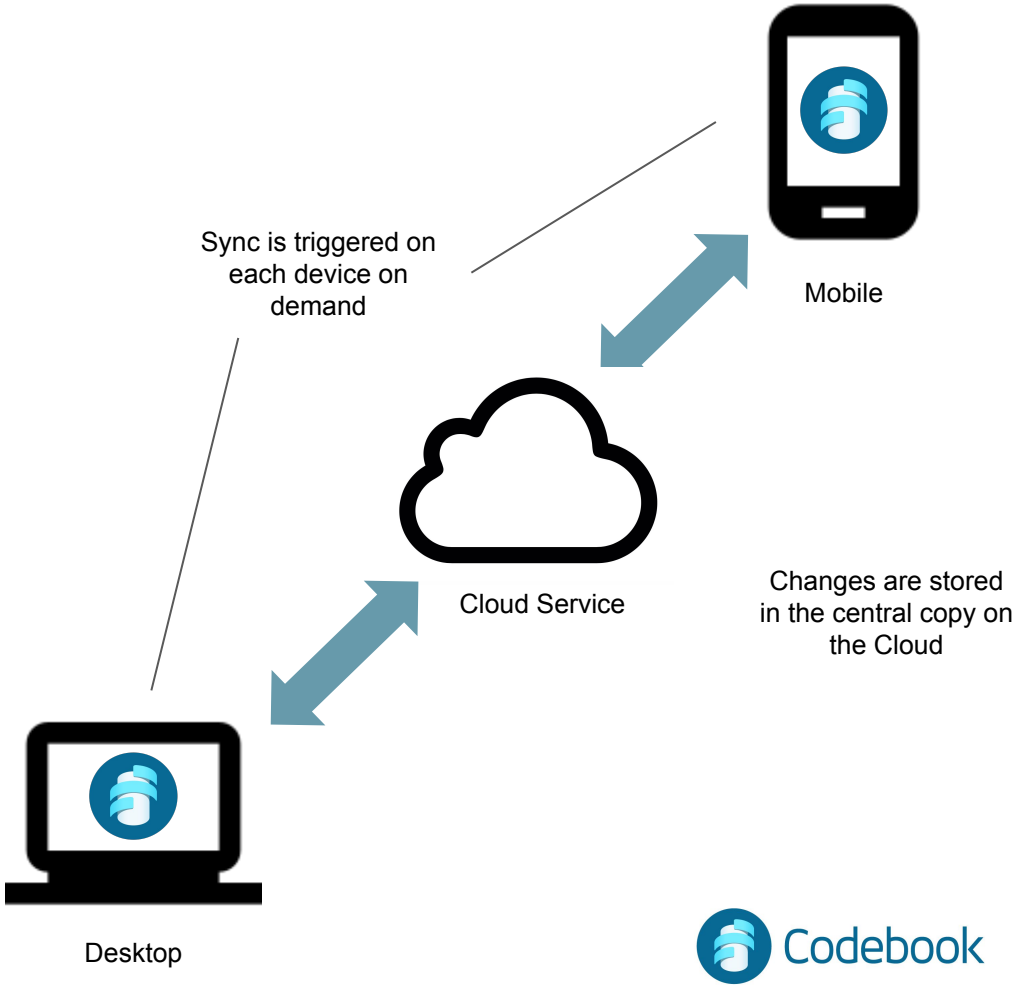
Data can be synced using your Dropbox or Google Drive account

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 done with one Cloud Service at a time

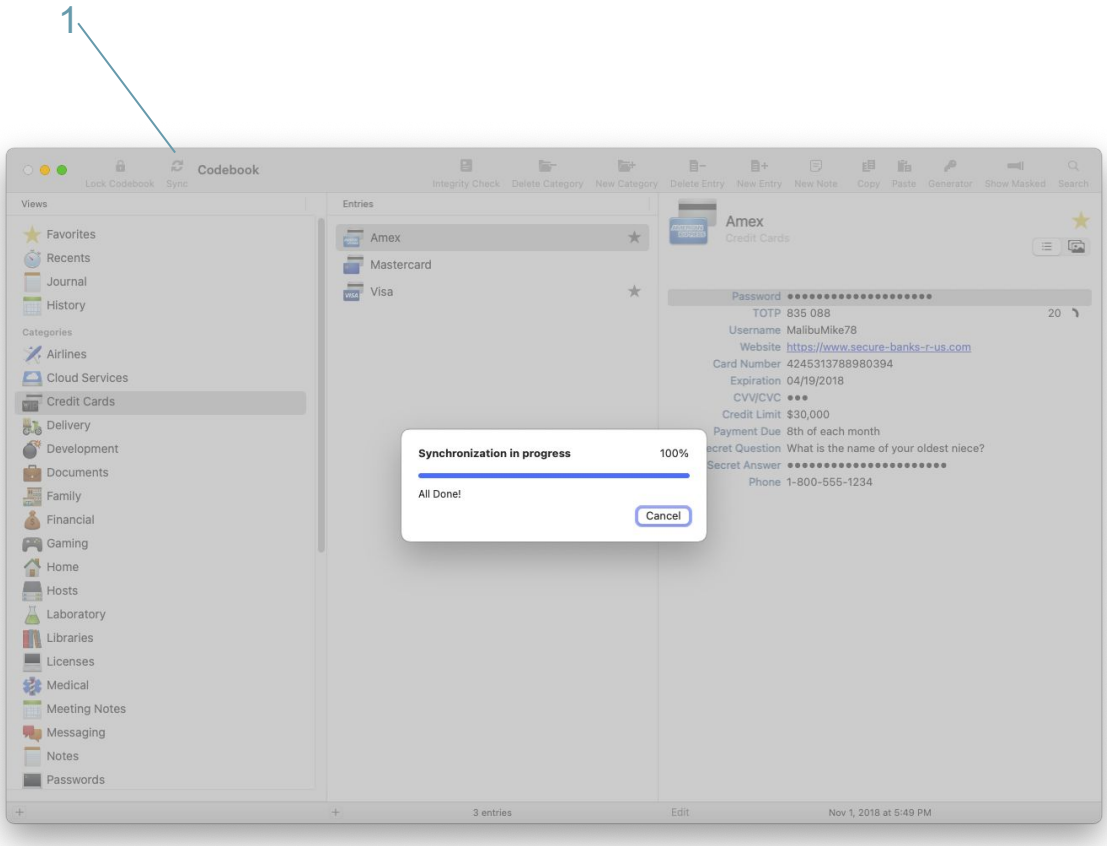
** The same Sync Key is used for all of your devices **



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.



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Cloud Service Sync example

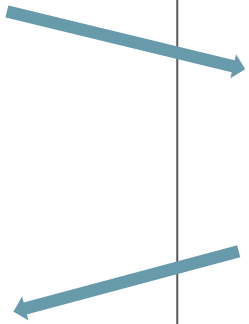
Computer

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



Codebook

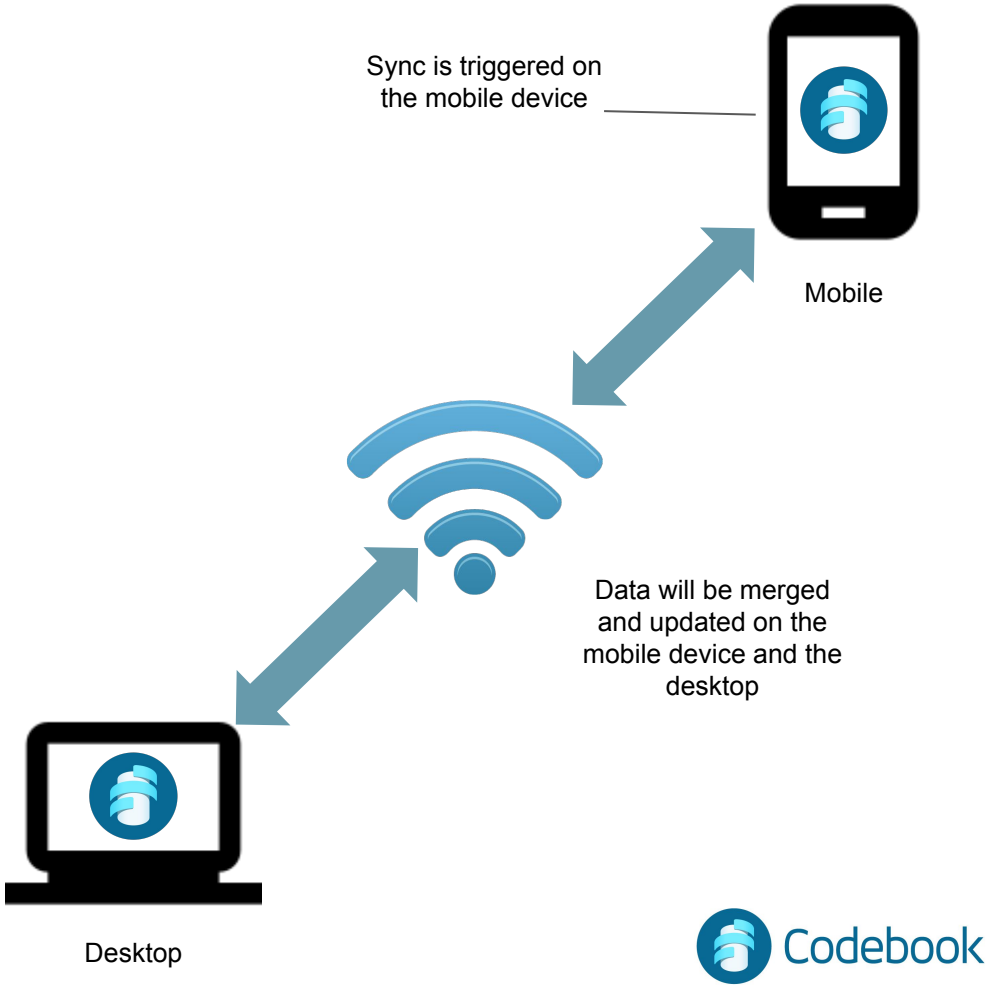
Sync Using Desktop WiFi

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



Codebook

Important Preferences

Codebook

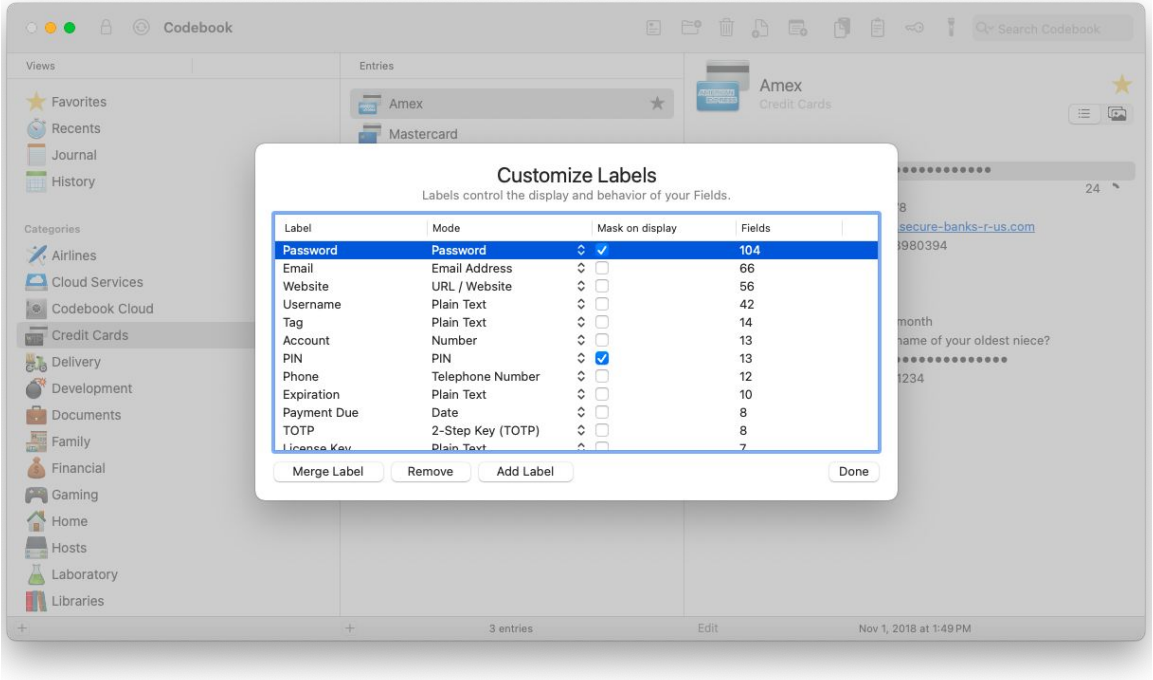
Customize Labels

Add new custom labels

Customize behaviors

Enable masking

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



Codebook

Autolock

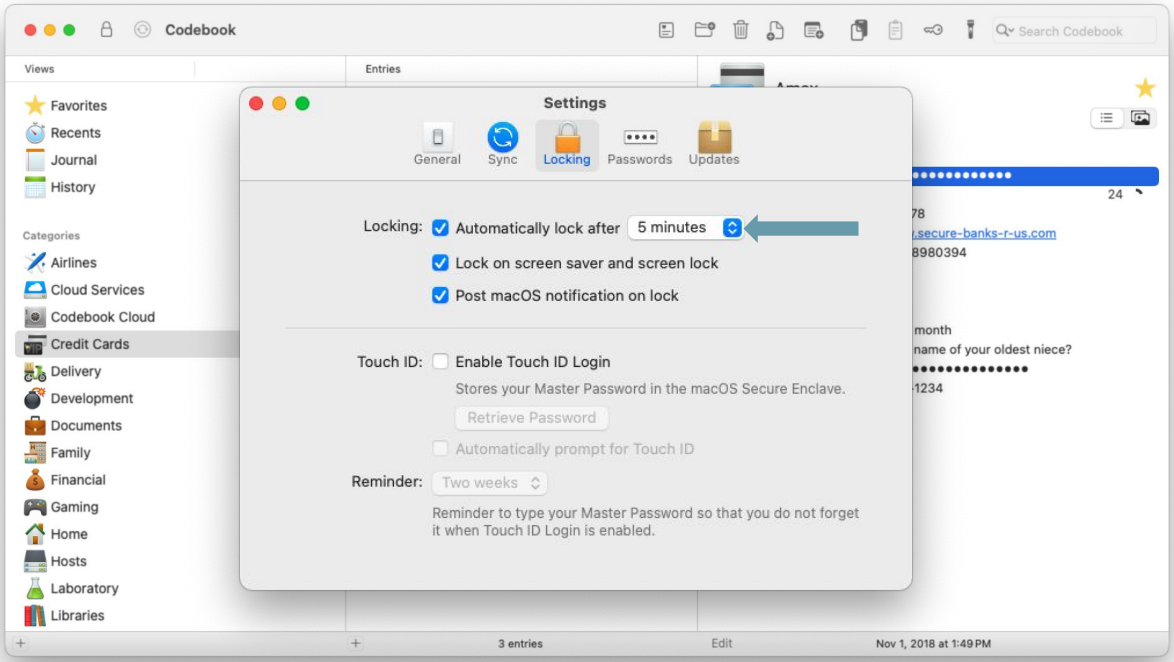
Leaves application unlocked for a designated period of time (default 5 minutes)

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 -> Settings -> Locking



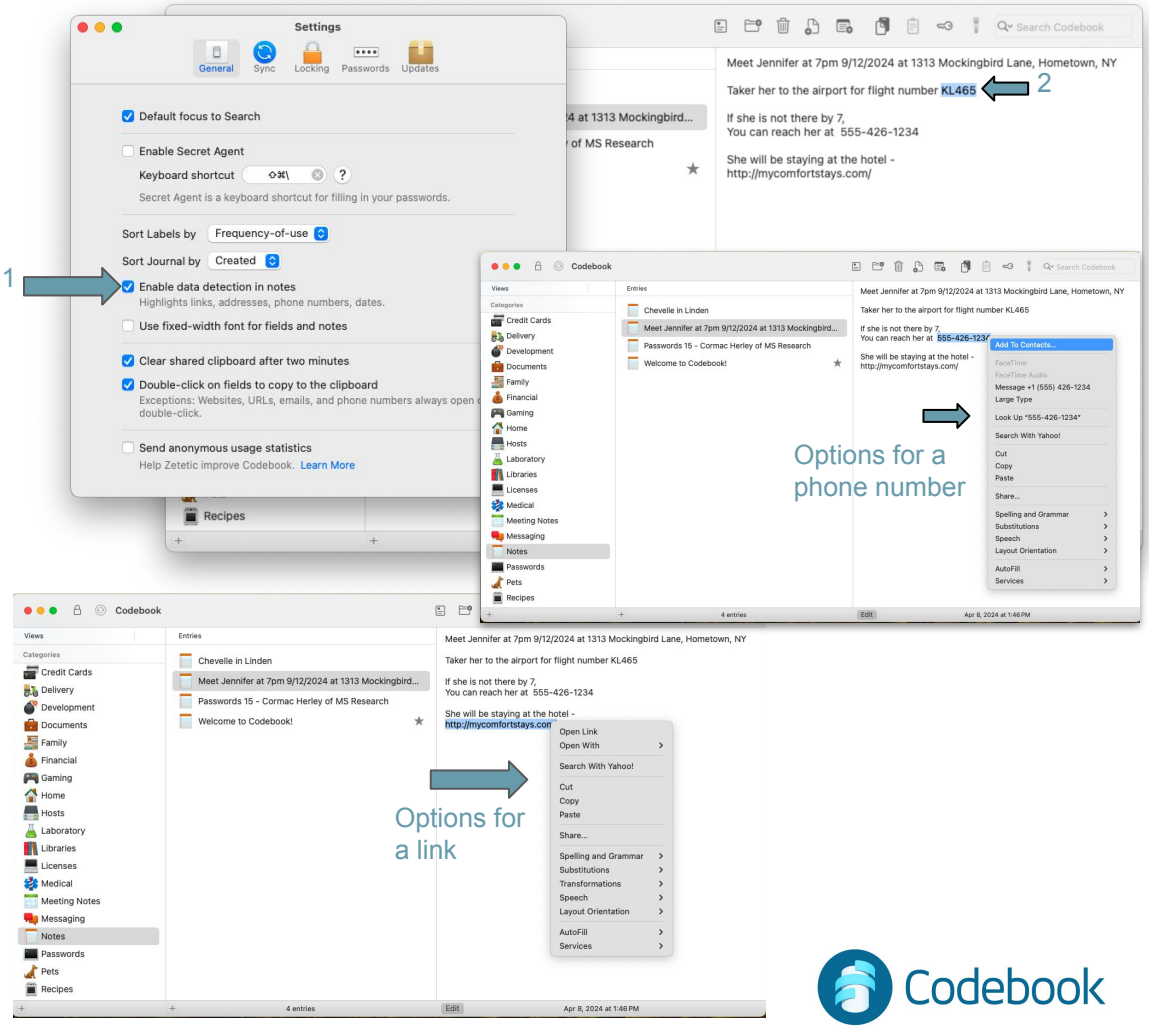
Codebook

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 -> Settings -> General
2. When in edit mode hovered over the data that can interact. Right click to show the available options.

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

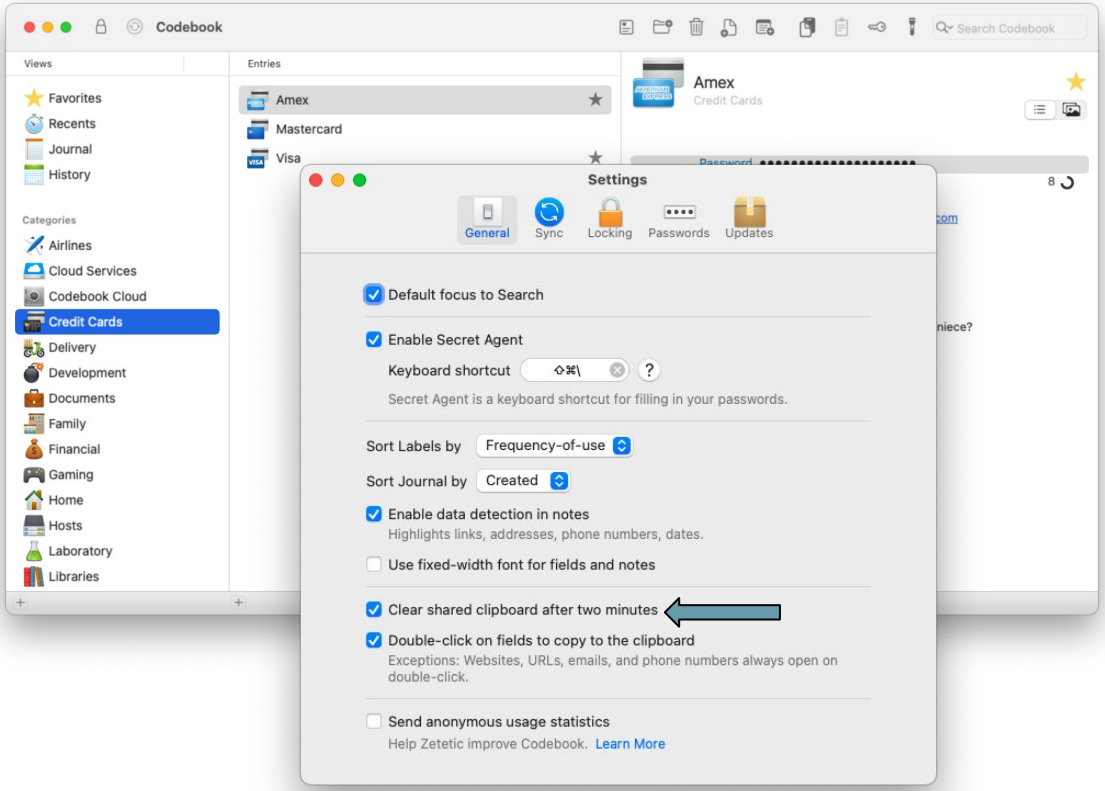


Codebook

Clipboard clear

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

Available under Codebook menu -> Settings -> General



Codebook

Password Review

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

You can also review a password on an existing entry:

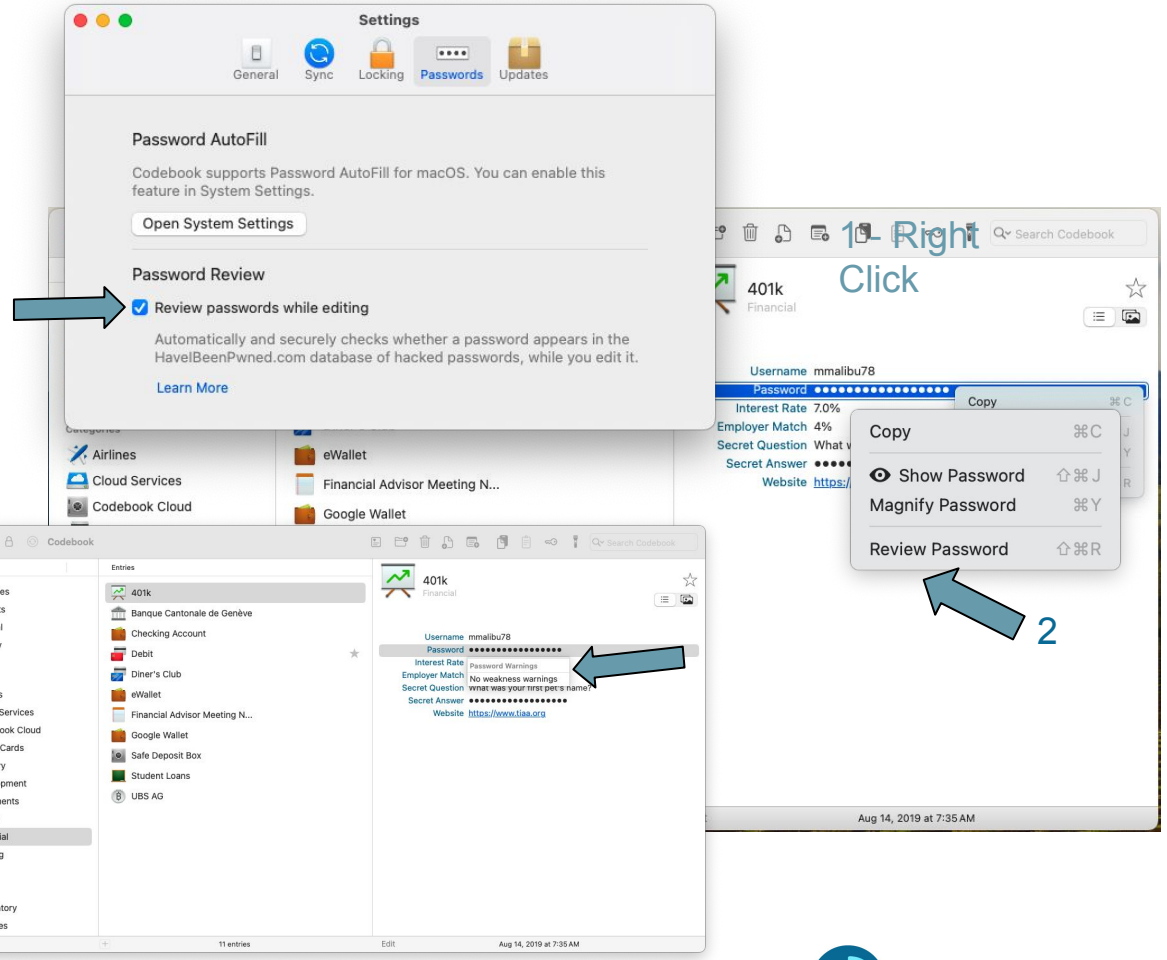
1. Right click on a password field. The Password Options Menu will be displayed.
2. Click Review Password. Codebook will let you know if any breaches have been found.

OR

Use the Keyboard Shortcut -

⬆️+⌘+R

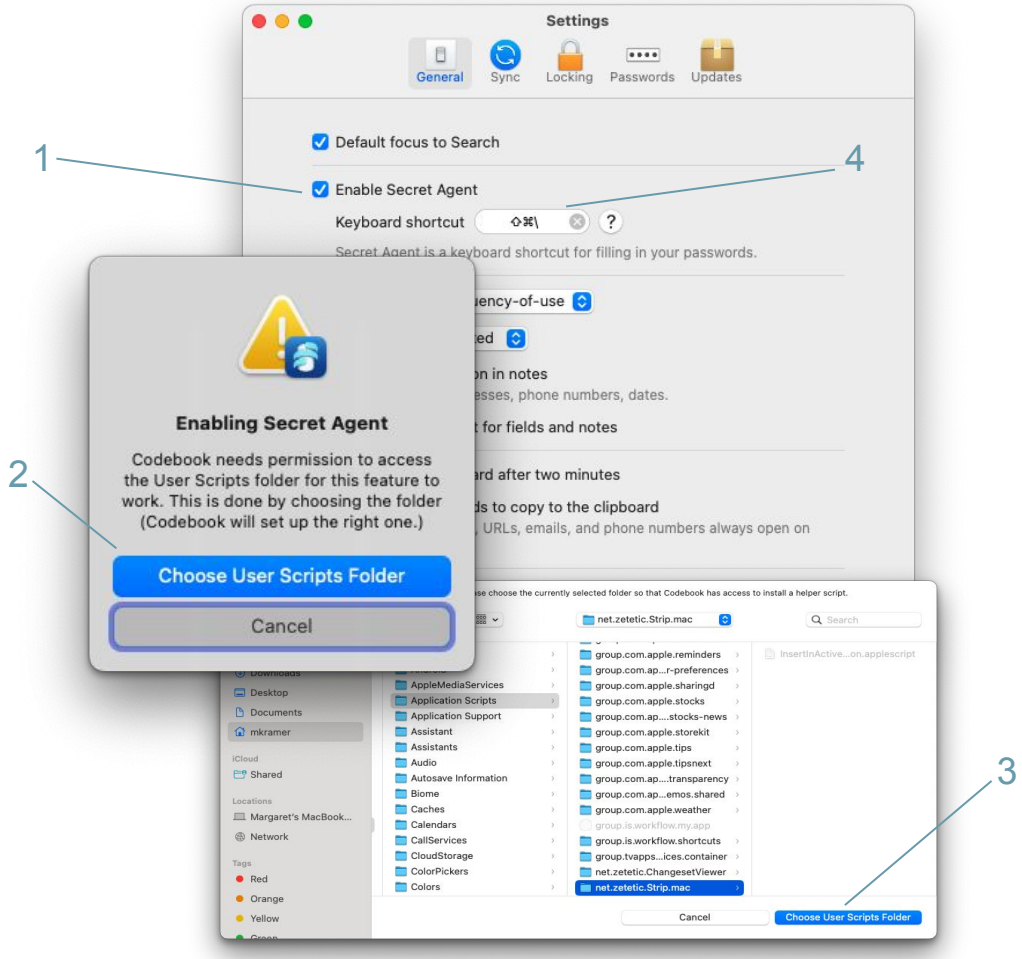
To perform Password Review



Codebook

Secret Agent

1. On Settings Menu, check “Enable Secret Agent with keyboard Command”
2. Click the “Choose User Scripts Folder” button
3. Codebook will choose the correct folder, simply click “Choose User Scripts Folder” again
4. Choose the key sequence to launch Secret Agent



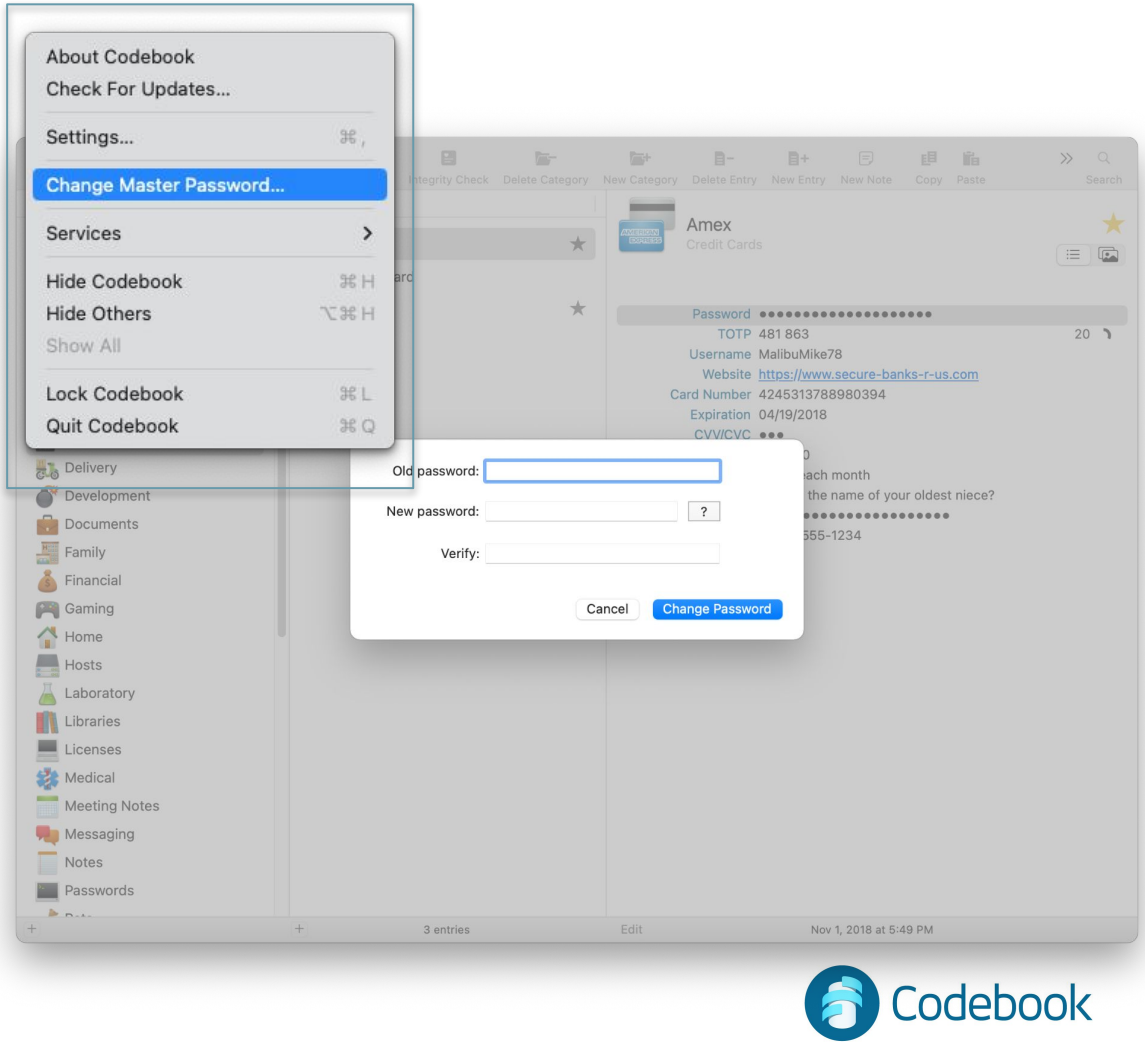
Codebook

Other Features

Codebook

Password Change

Available under Codebook menu ->
Change Master Password

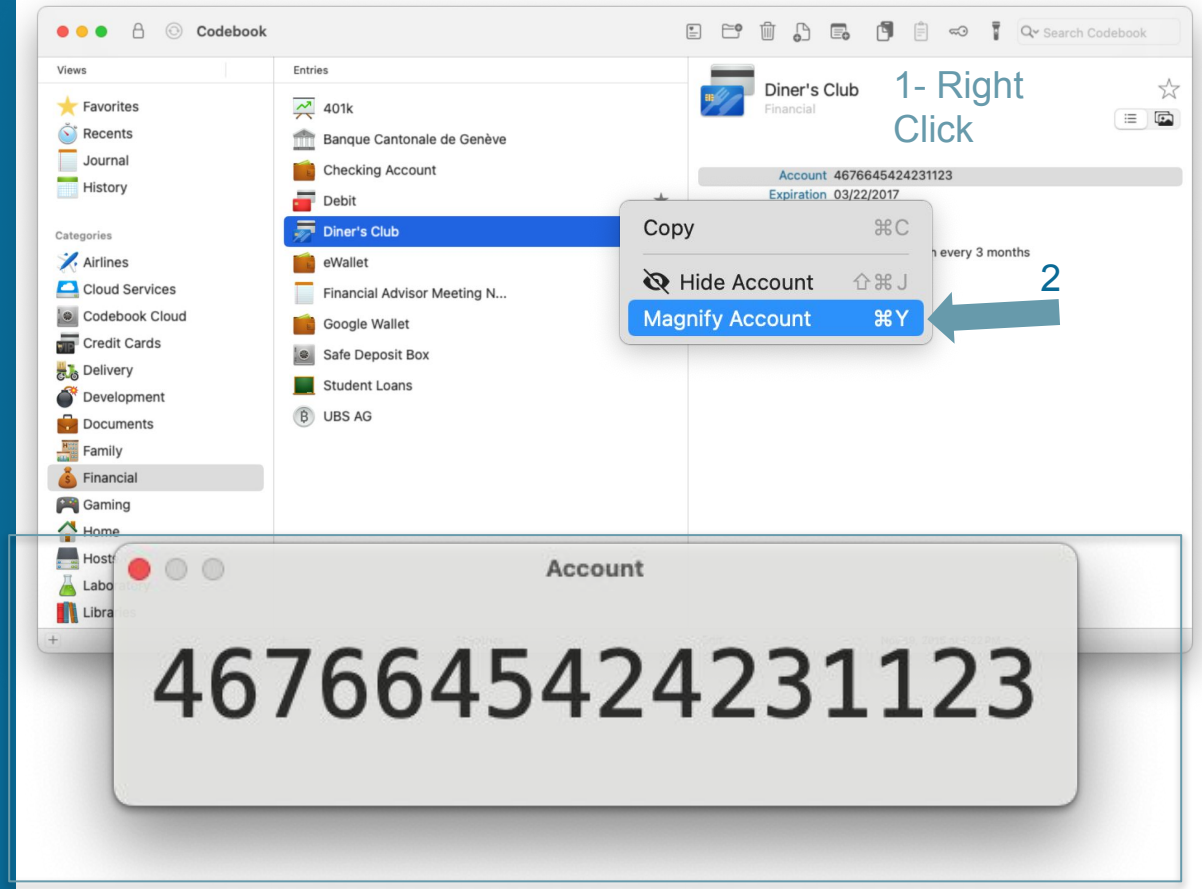


Codebook

Magnify a Field

To Magnify a field in an entry:

1. Right click on a field. The Field Options Menu will be displayed.
2. Click Magnify [field type].
3. The value of the field will be displayed in a large font.



Codebook