Codebook

Codebook for Windows
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 and 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, capital, 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. Menu
2. Toolbar
3. Search
4. Category List
5. Entry List
6. 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 (ctrl+shift+n)
2. Enter Descriptive Name
3. Choose Icon
4. Save
Create an Entry

1. New Entry or (ctrl+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 the most important record
6. Save entry
Special Labels & Behaviors

- **Password / PIN**
  - Masked
  - Supports random generation

- **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
2. First line becomes title
3. Multi line text content
4. Save note
Deleting records

1. Category (and all entries inside)
2. Entry
3. Fields

Be careful not to lose information!
Navigation and Retrieval
Categories

Navigate through your own custom organization structure

1. Choose a Category from the navigation area
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
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

1. Enter search criteria
2. Choose Entry

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

Data can be copied to the clipboard

1. Select Field
2. Right click or ctrl+c

Paste into other applications

Clipboard is managed and cleared automatically
Secret Agent
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

Secret Agent is automatically enabled on Windows
Use

1. Press CTRL-SHIFT-
2. Enter search term
3. Arrow down or up to navigate
4. Press return to select Entry
5. Arrow down or up to select Field
6. Press return to enter value to active Text area with cursor

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 merge

All data is encrypted on Google Drive
Synchronization

Codebook can keep data in sync across multiple devices

Changes made on any device merge

All data is encrypted on Dropbox

Sync is triggered on each device on demand

Changes are merged in the central copy on Dropbox
Set Sync Preference

1. Select File->Preferences

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

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

4. Desktop WIFI sync is initiated from the IOS or Android device.
How to sync

1. Start Sync
2. Authenticate to Google Drive
3. Trigger sync on any other devices to transfer data

Tip: Sync periodically to Google Drive to keep an up-to-date encrypted copy of your data in case of machine failure
How to sync

1. Start Sync
2. Authenticate to Dropbox
3. Trigger sync on any other devices to transfer data

Tip: Sync periodically to Dropbox to keep an up-to-date encrypted copy of your data in case of machine failure
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 “Restore” mode to initialize a database on a brand new device
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
Sync example

**Computer**

1. Add a new entry in Codebook Desktop
2. Start Sync
3. Changes copied to Google Drive or Dropbox

**Mobile**

4. Start Sync
5. Desktop changes merged from Drive to Codebook Mobile
6. Edit Entries on Codebook Mobile
7. Start Sync
8. Mobile changes copied to Google Drive or Dropbox

9. Start Sync
10. Mobile changes merged from Google Drive or Dropbox to Codebook Desktop
Important Preferences
Customize Labels

Add new custom labels

Customize behaviors

Enable masking

Available under File -> Customize Labels
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

Available under File -> Preferences
Secret Agent

Choose the key sequence to launch Secret Agent

Enable Codebook and Secret Agent to launch on login (in a locked state)
Other Features
Password change

Available under File -> Change

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.
Backups

Backups are snapshots of the database state at a point in time

Triggered

1. Manually on demand
2. Automatically before each sync operation

Backups are fully encrypted with your master password

Available under File -> Database Information -> Backups (Tab)