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
- 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)
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 outside Codebook. ***
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!
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 SHIFT + CTRL + \\n2. 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 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
Set Sync Preference

1. Select File → Preferences → Sync

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)

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.
Initial Sync Key Setup

When Codebook is first setup, you need to Setup Your Sync Key. A Sync Key is only generated once and the same key is used for all of your devices.

You will be asked, ‘Have you already created your Sync Key in another copy of Codebook?’

Select ‘No’

Codebook will generate your Sync Key.

** 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**
Setting Up Sync on a New Device

When Codebook is already setup on another device, you need to import your existing Sync Key.

As part of setup for your device, you will be asked, ‘Have you already created your Sync Key in another copy of Codebook?’

Select ‘Yes’

Select ‘Next’ and you will be prompted to import your Sync Key

** There is only one the Sync Key that is used for ALL of your devices. **
Setting Up Sync on a New Device

Select Scan QR Code to import your Sync Key

To scan your existing Sync Key you need to display it from another device:
- From the desktop app: select Sync menu → Add a New Device
- From the mobile app: Sync View → Add a New Device
This will display a QR code containing an encrypted representation of your Sync Key to scan on your Windows Codebook app

- Scan the QR code using your computer’s camera
- Enter the master password that was used when the sync key was created
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.
How to sync using a Cloud Service

** Have your Sync Preference set to the desired Cloud Service **

1. Start Sync
2. Sign into your Google Drive or Dropbox account to authenticate
3. Sync will proceed after authorization

Tip: Sync periodically to the Cloud to keep an up-to-date encrypted copy of your data in case of machine failure
Cloud Service Sync example

Computer
1. Add a new entry in Codebook Desktop
2. Start Sync
3. Changes copied to Cloud Service
9. Start Sync
10. Mobile changes merged from Cloud to Codebook Desktop

Mobile
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
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.

Sync is triggered on the mobile device.

Data will be merged and updated on the mobile device and the 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 Master Password