Codebook

Codebook for Windows
Introduction and Usage - Release 5.0

Codebook

What is Codebook

Encrypted Data Vault

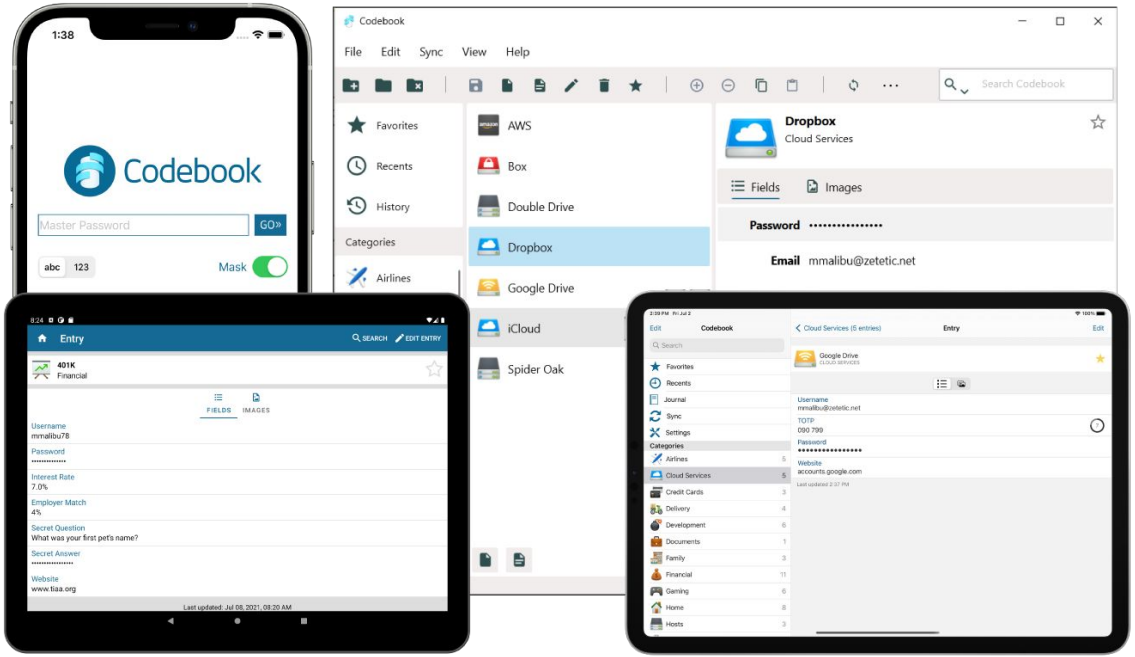
Guards passwords and private data

Keeps sensitive information organized

Enables quick recall of secrets

Syncs data across multiple devices

- iOS (iPhone / iPad)
- Android
- Windows
- Mac OS X



Codebook

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.

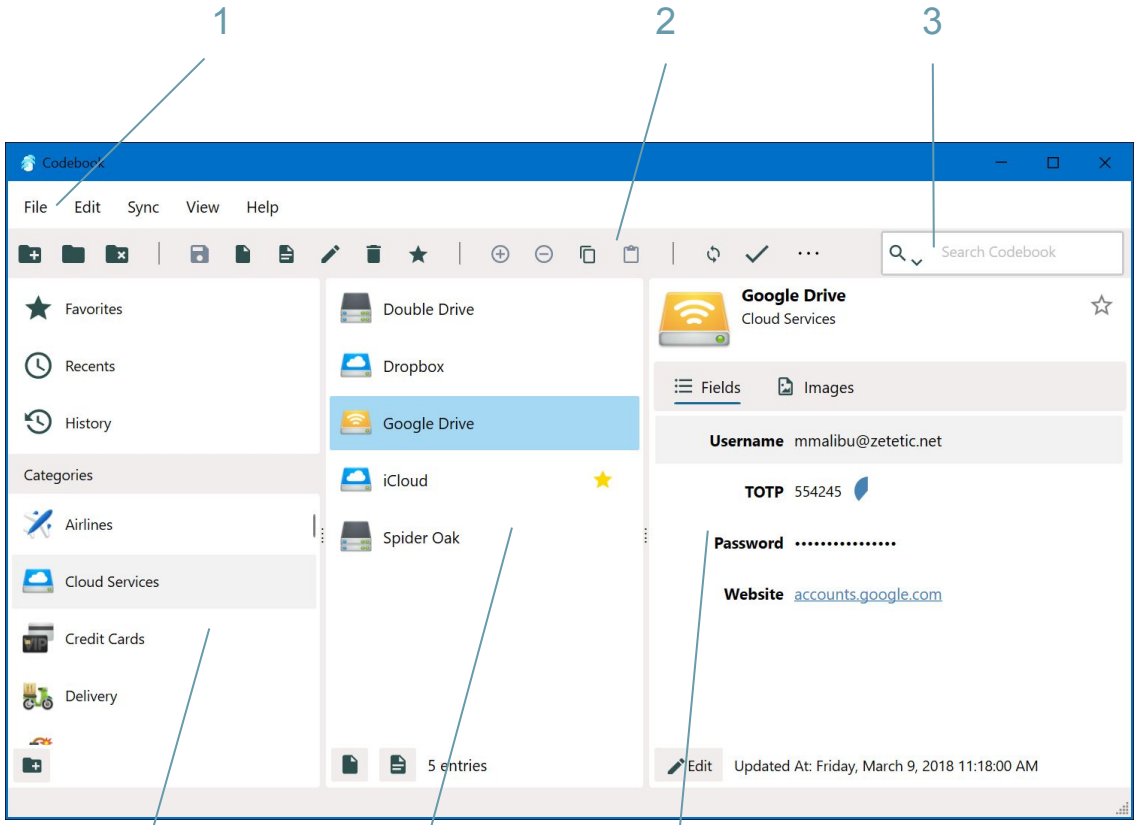
Recommendations:
- at least 8 characters including 1 of each, capital, number, lowercase, and special character, ex: ! $?
- Complex and difficult to guess

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

Codebook

Welcome

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



Codebook

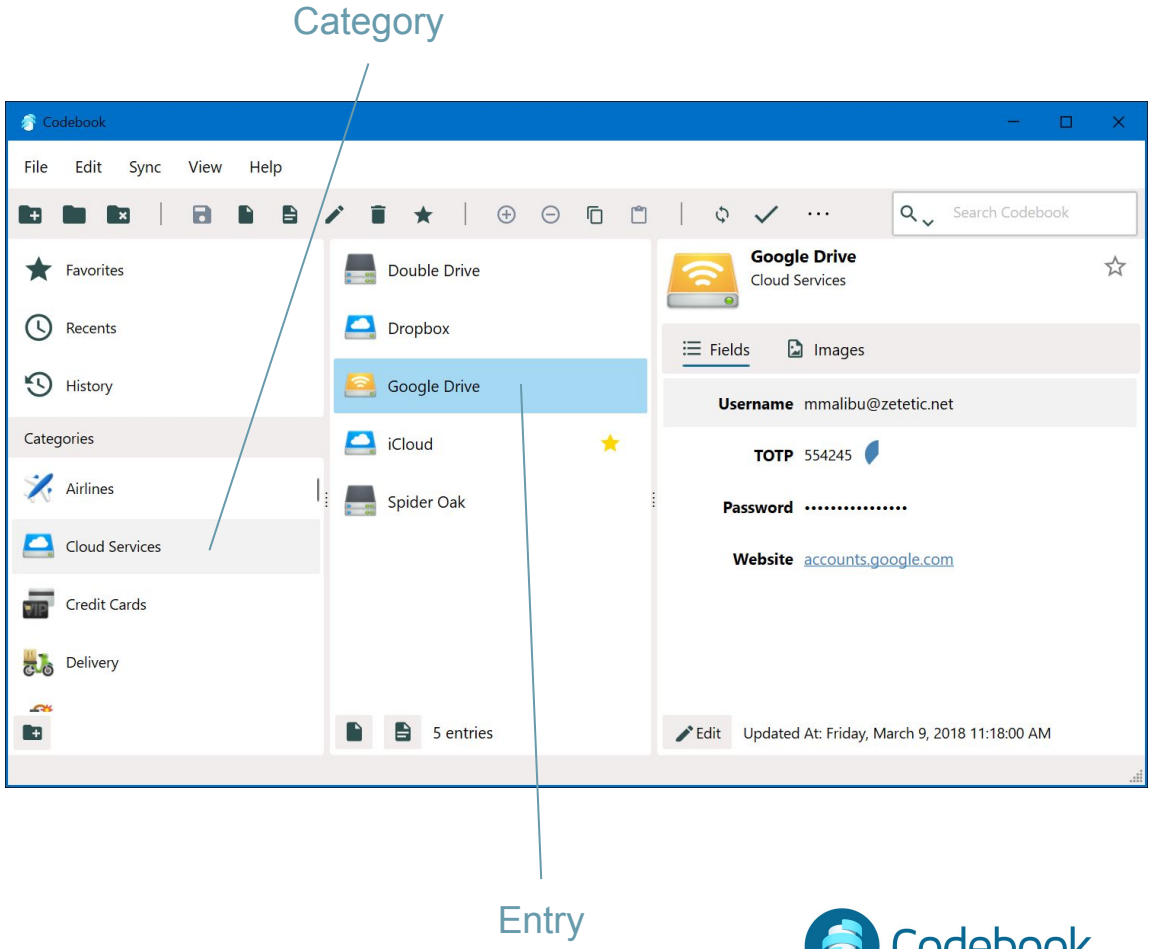
Data model

Category

- Groups records
- Navigation-based retrieval

Entry

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



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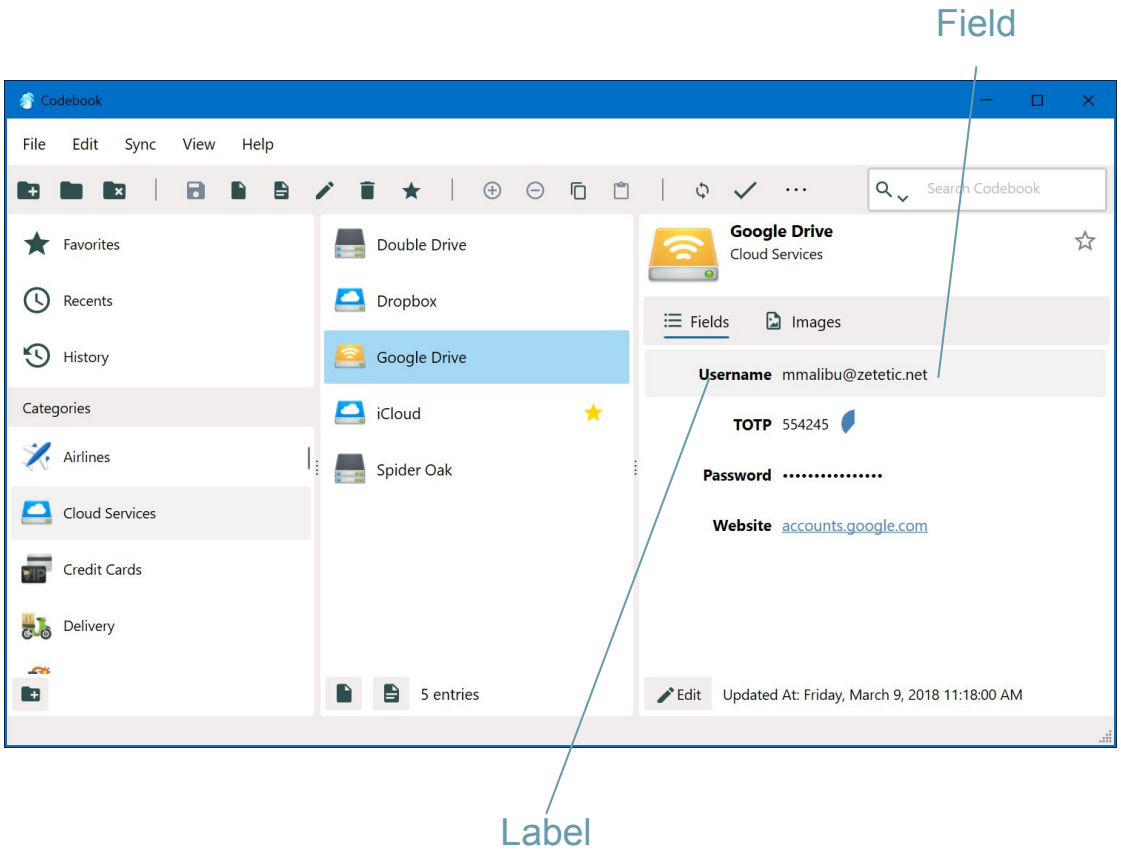
Data model

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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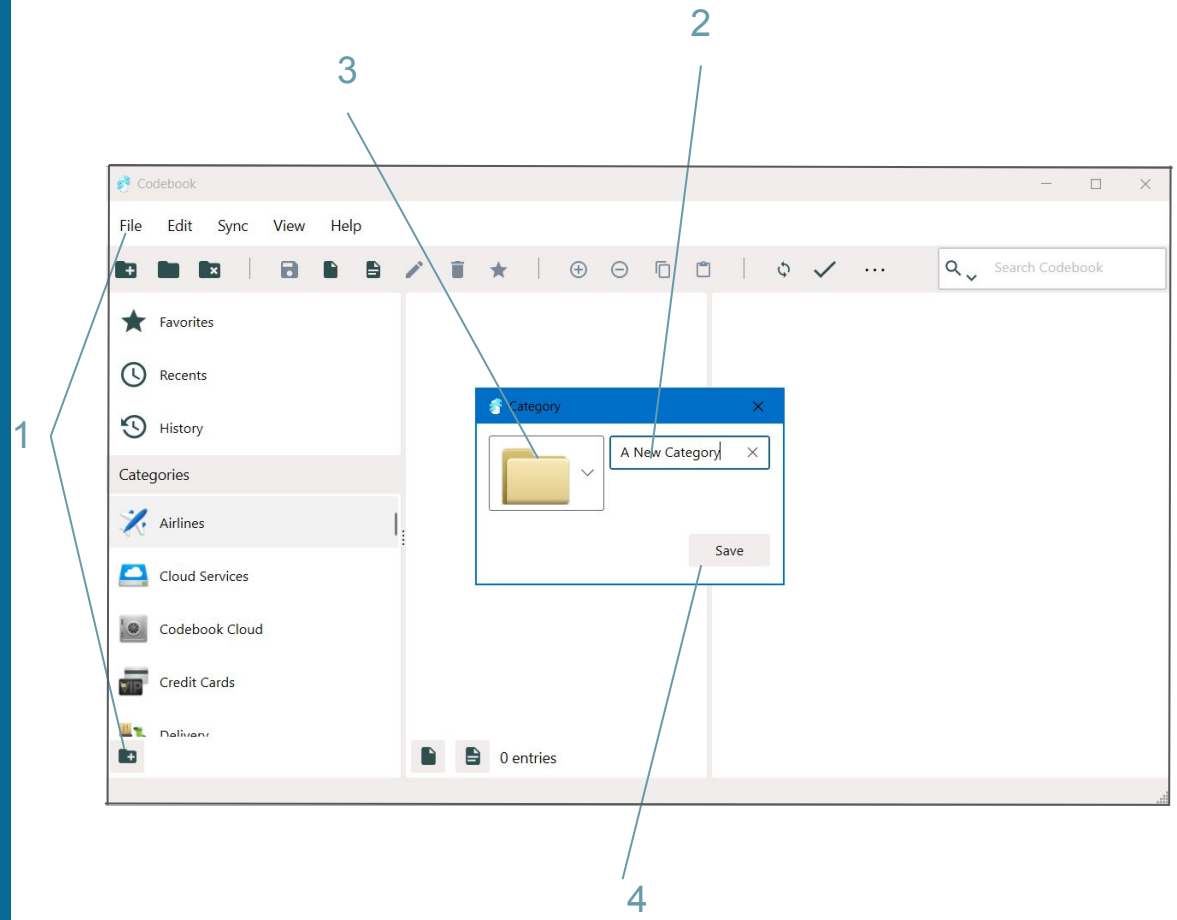
Create a Category

1. New Category or (ctrl+shift+n)
2. Enter Descriptive Name
3. Choose Icon
4. Save



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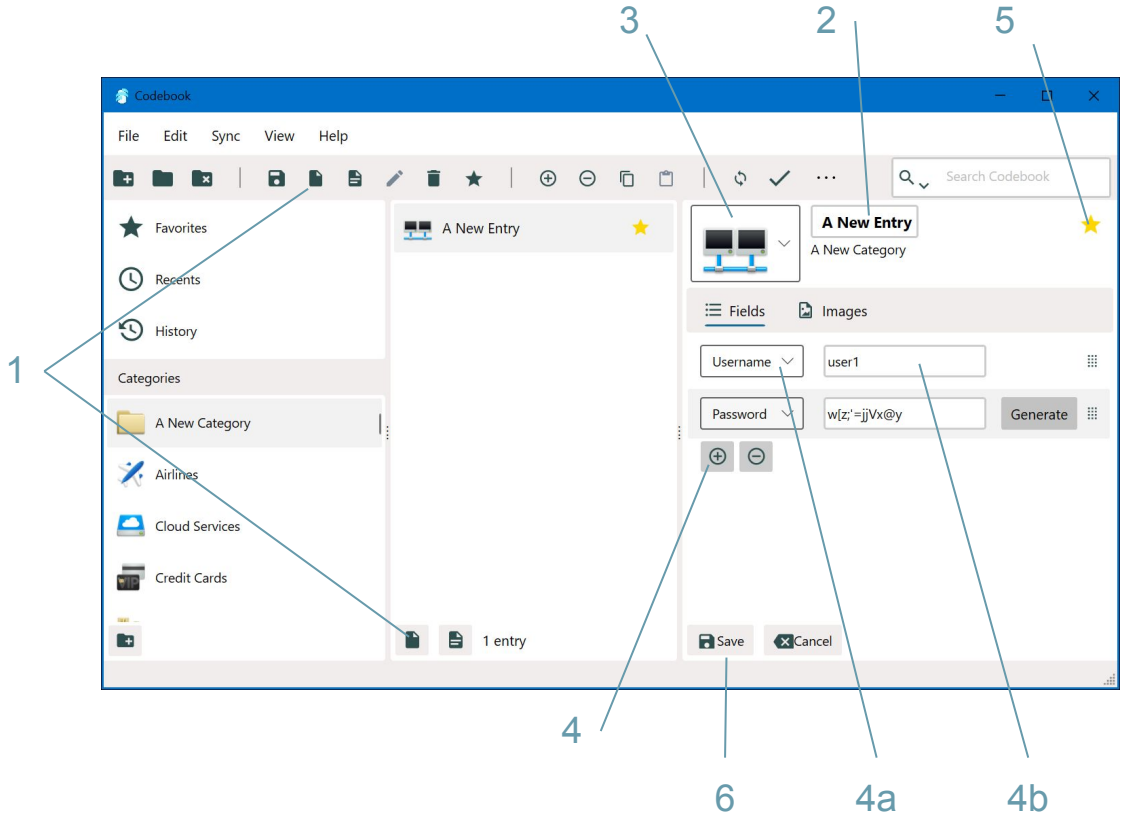
Create an Entry

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 entries
6. Save entry



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

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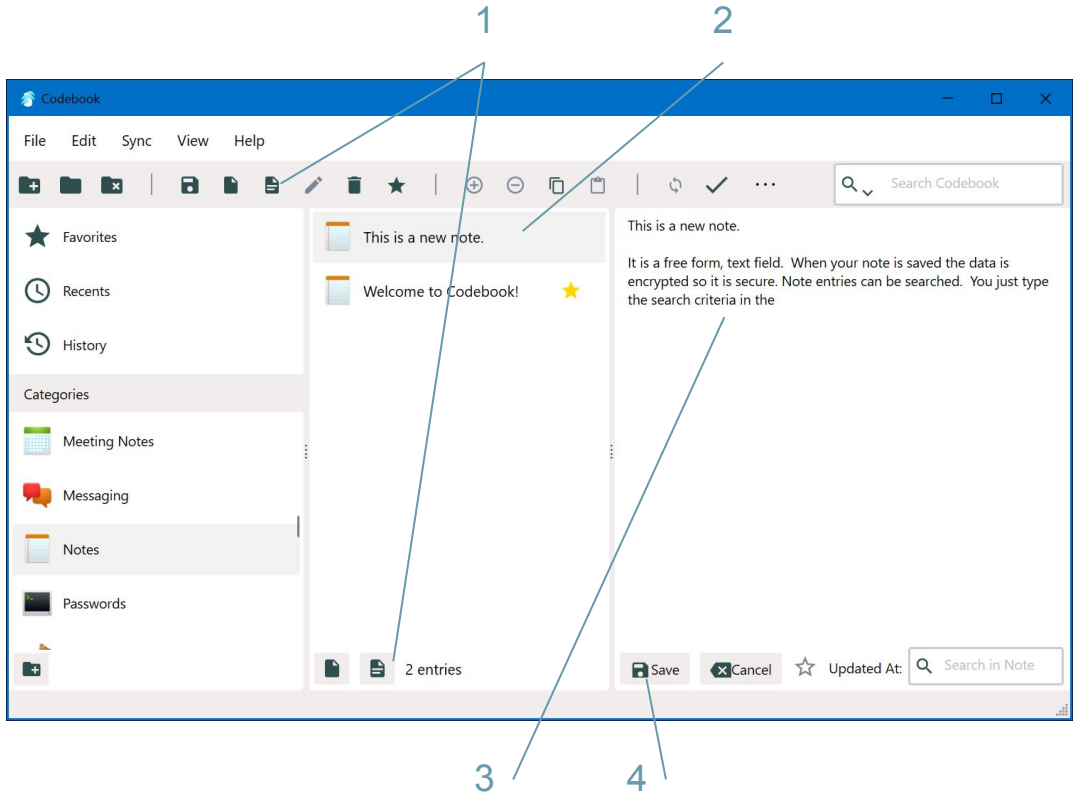
Create a Note

1. Add Note Entry
2. First line becomes title
3. Multi line text content
4. Save note



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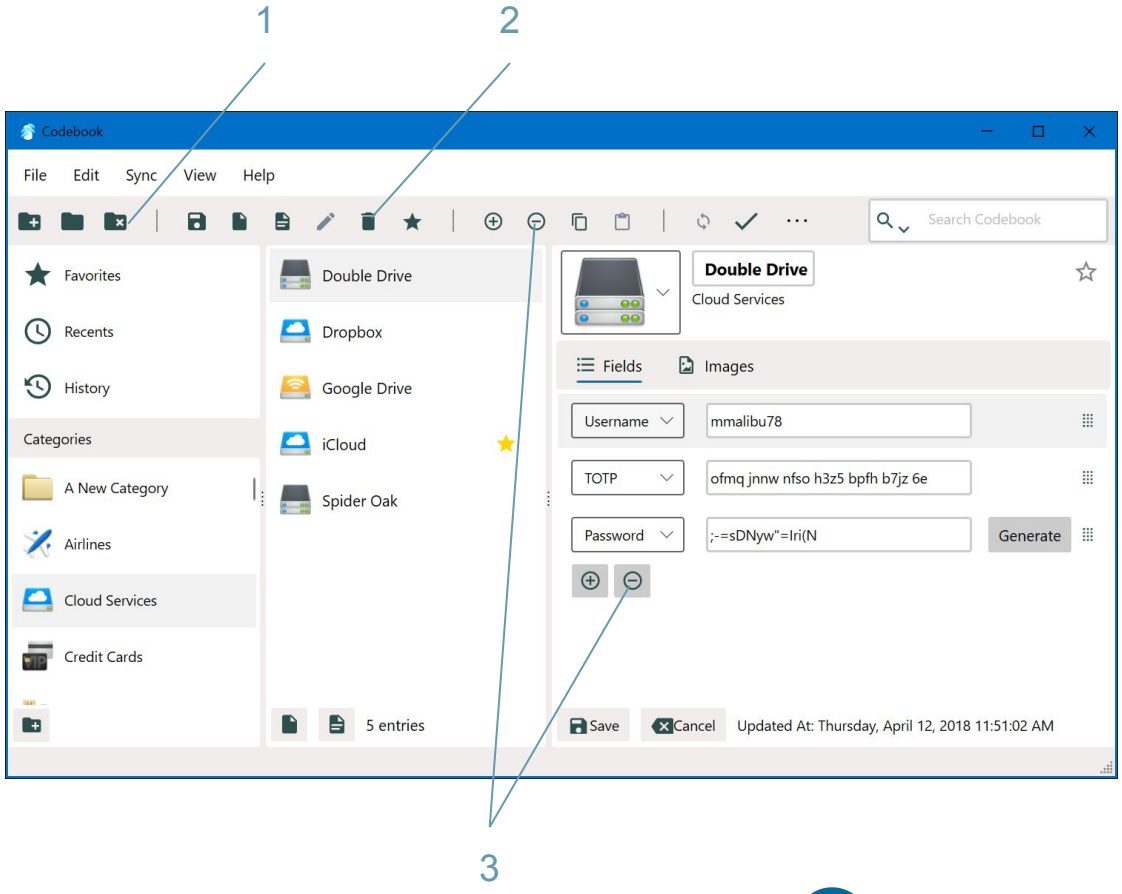
Deleting records

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.



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Navigation and Retrieval

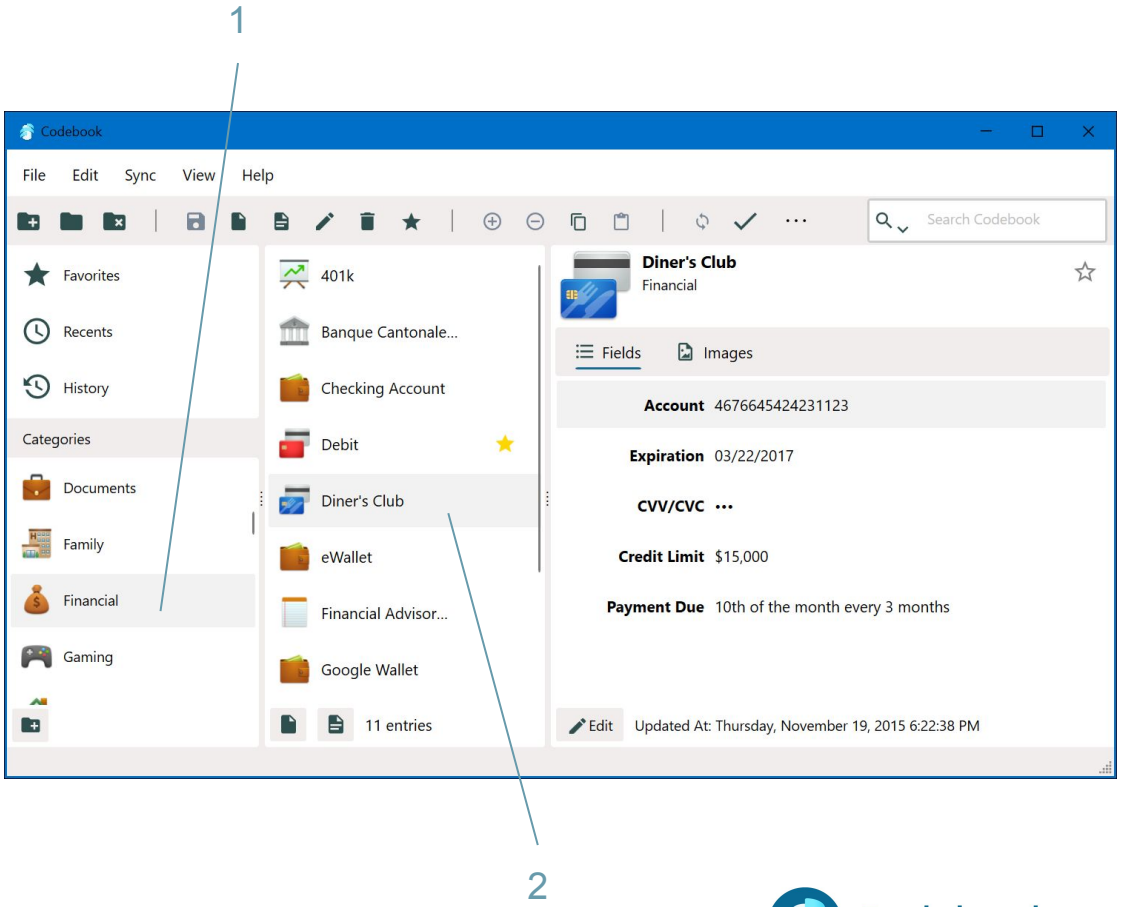
Codebook

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



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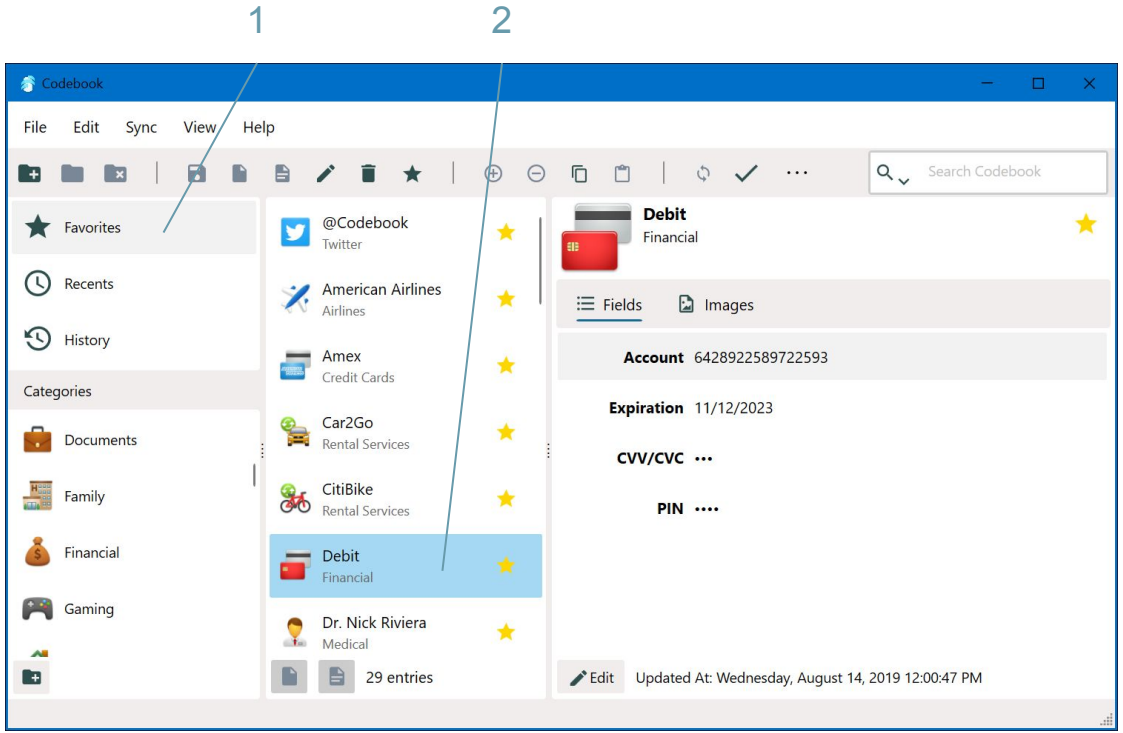
Favorites

Entries marked with the Favorite star are quickly accessible

1. Tap “Favorites” from the navigation area
2. Choose Entry



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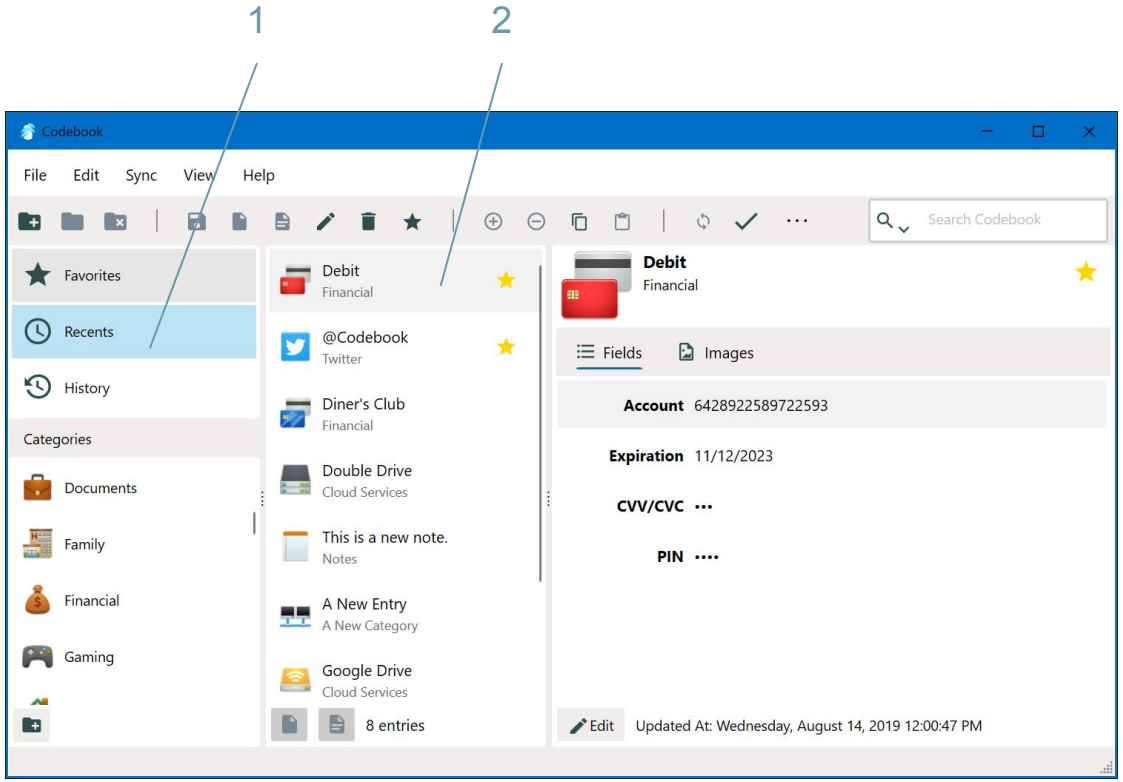
Recents

Quick retrieval of the 20 Entries most recently accessed

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

The most recently viewed entries are automatically displayed at the top of the list



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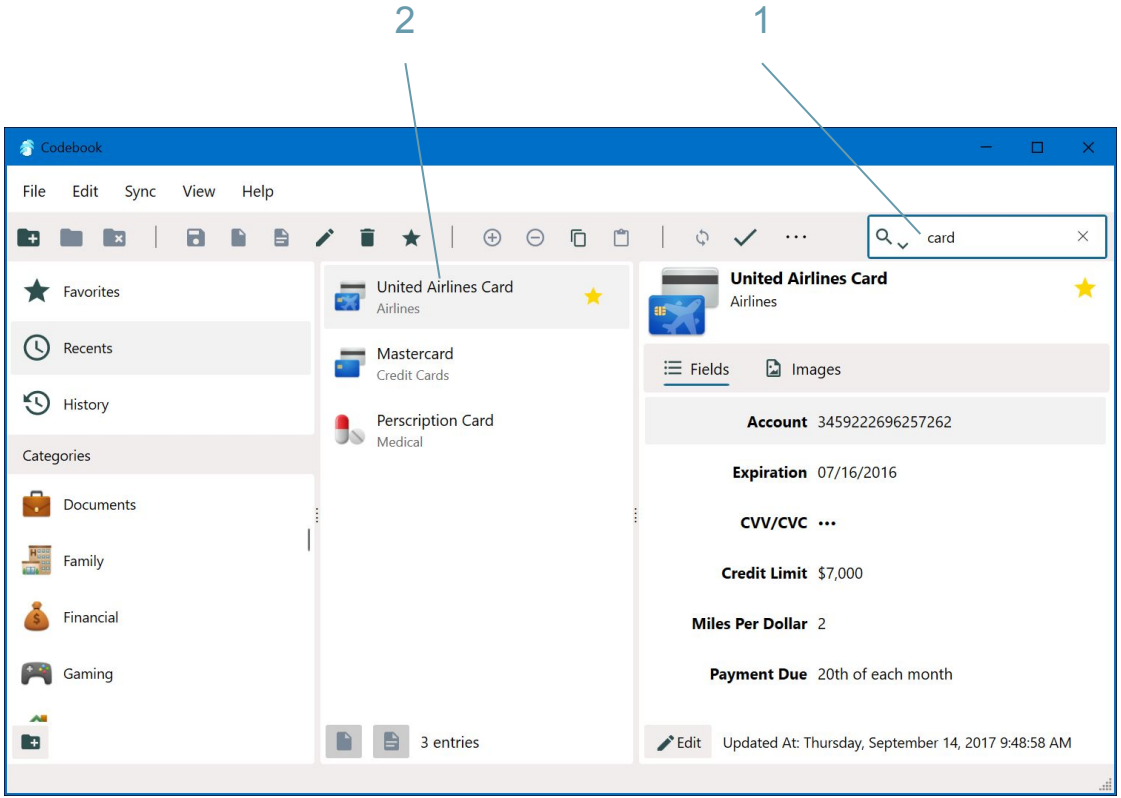
Search

Quick retrieval of information based on keyword

1. Enter search criteria
2. Choose Entry

Entry names and all field values are included in search



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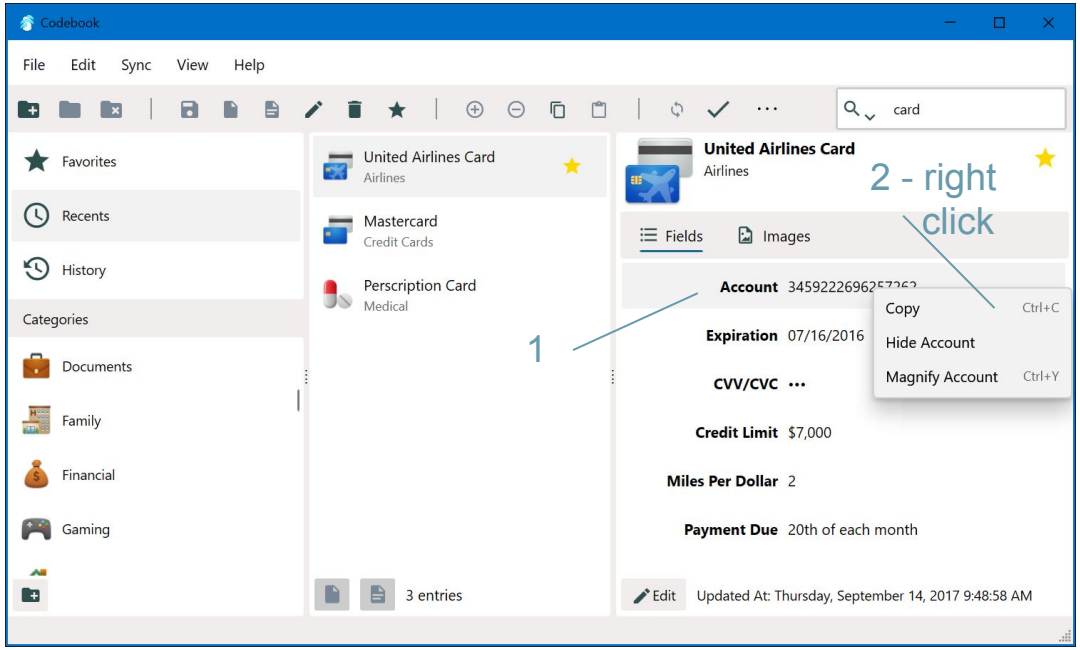
Copy / Paste

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



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Secret Agent

Codebook

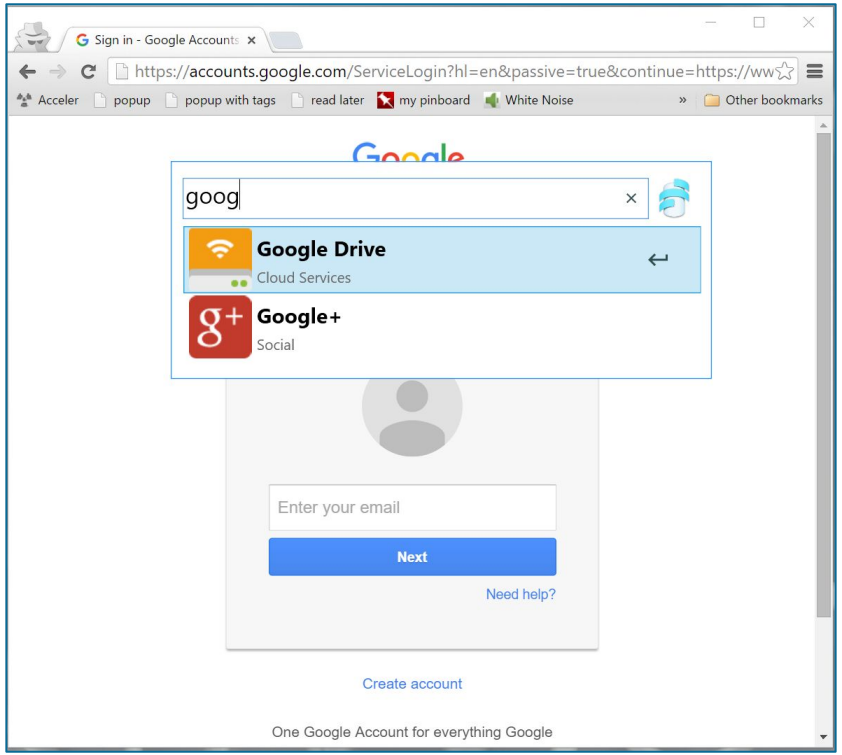
Secret Agent

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

Secret Agent is automatically enabled on Windows



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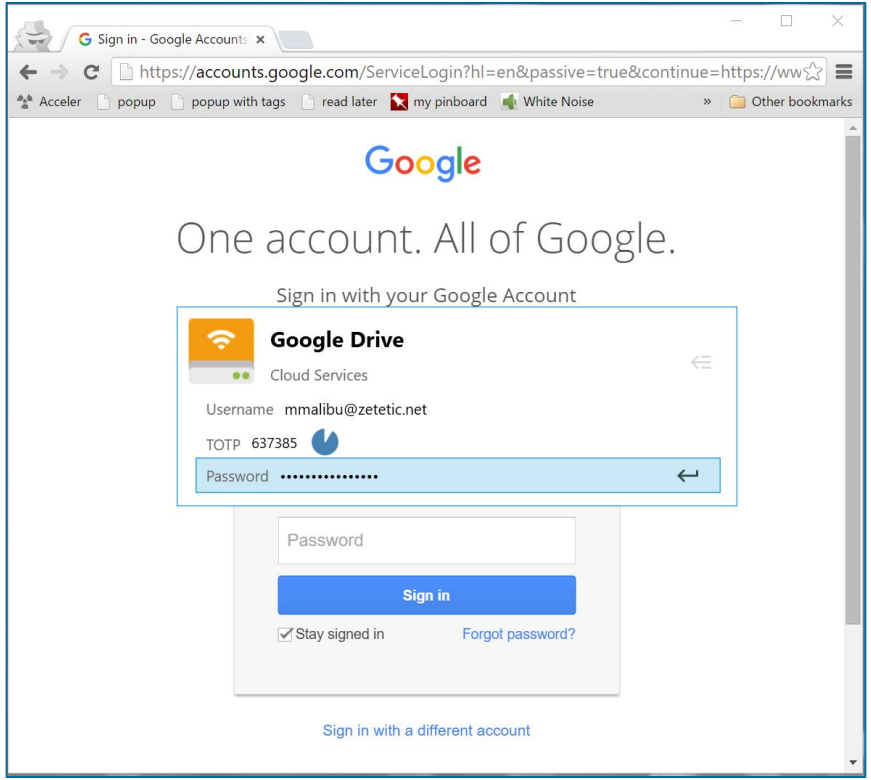
Use

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



Codebook

Synchronization

Codebook

Synchronization

Codebook can keep data in sync across multiple devices.

Changes made on any device can be merged.

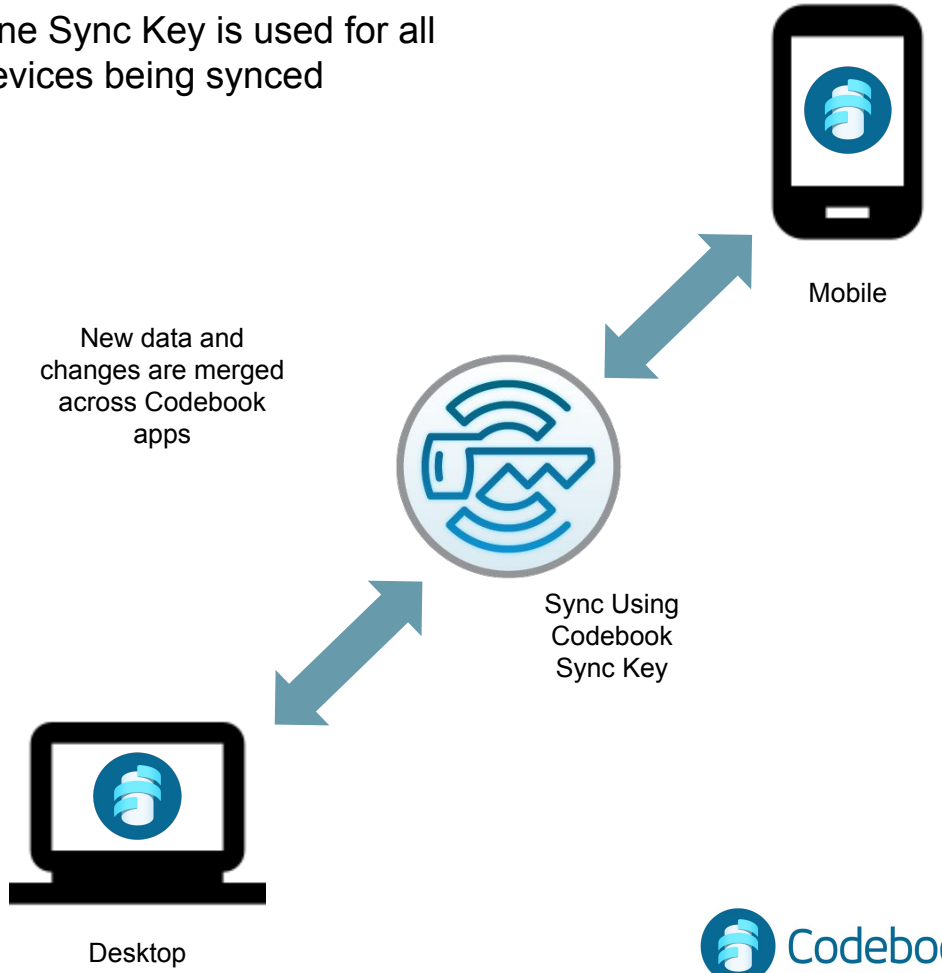
All devices to be synced share the same Sync Key. Your Sync Key is generated once and used for all of your devices.

Types of Syncing:

1. Codebook Cloud **
2. Cloud Service (Dropbox or Google Drive
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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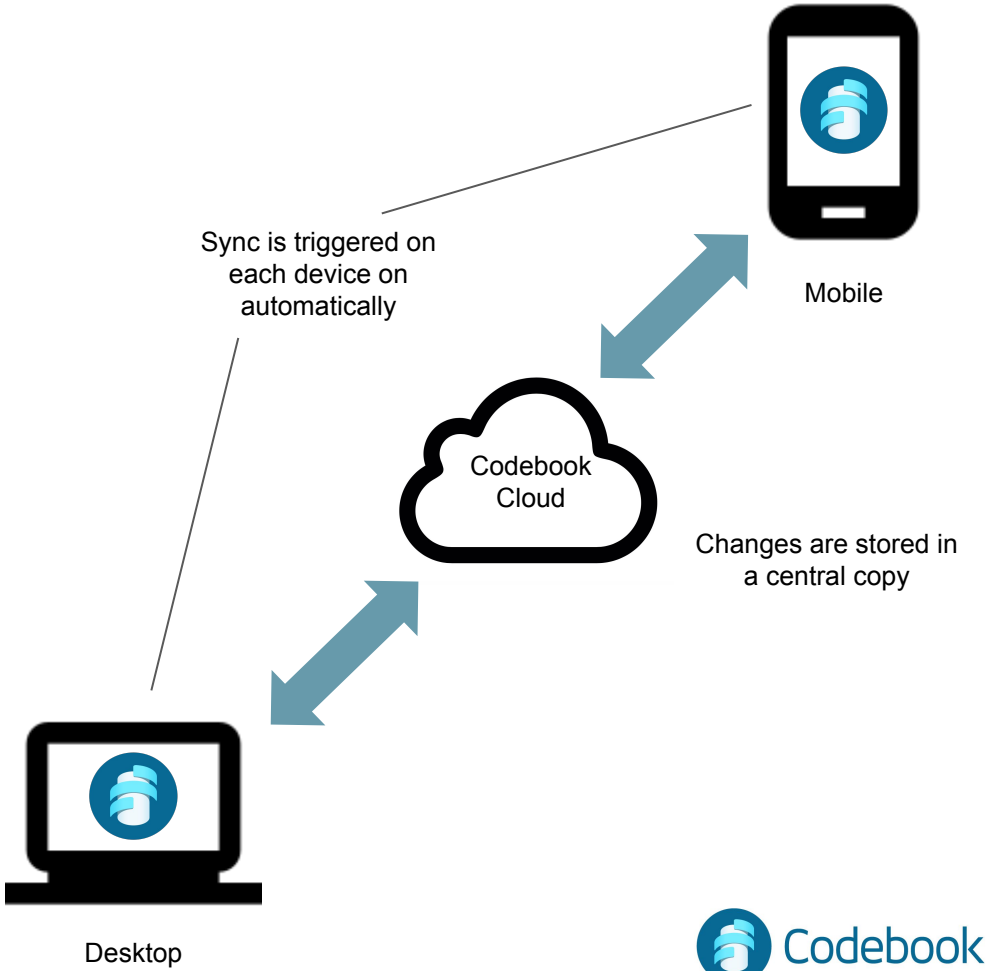
Codebook Cloud Synchronization

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 **



Create Codebook Cloud Account

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

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

During Installation:

1 - Enter your email

2 - Click continue then follow instructions

OR

After Installation from Sync Preferences:

1 - Codebook Preferences (File -> Preferences)

2a - Sync tab

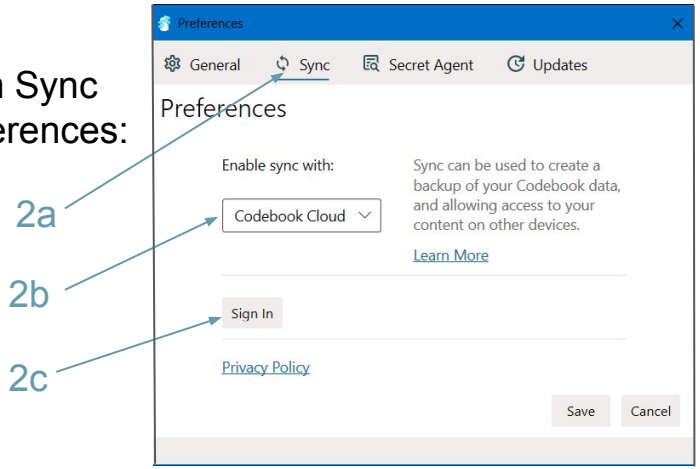
2b - Sync Service - Codebook Cloud

2c - Click Sign In then follow instructions

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

During Installation:

From Sync Preferences:



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Initial Sync Key Setup

If you created a Codebook Cloud account during installation, your Sync Key was generated for you.

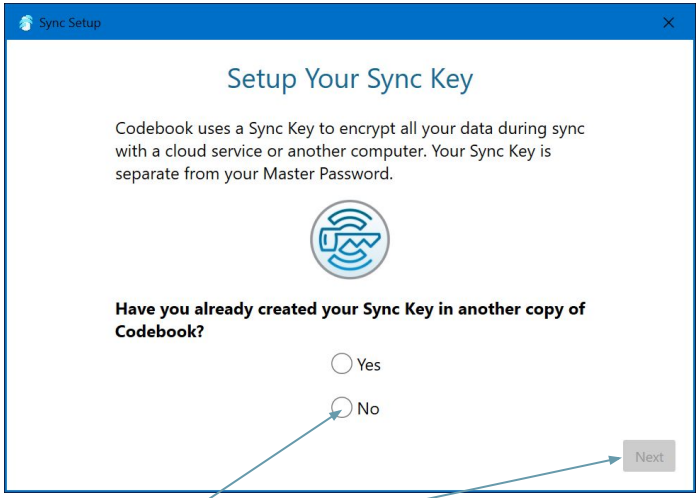
If you need to create a Sync Key, select Setup Sync Key from the Sync Menu

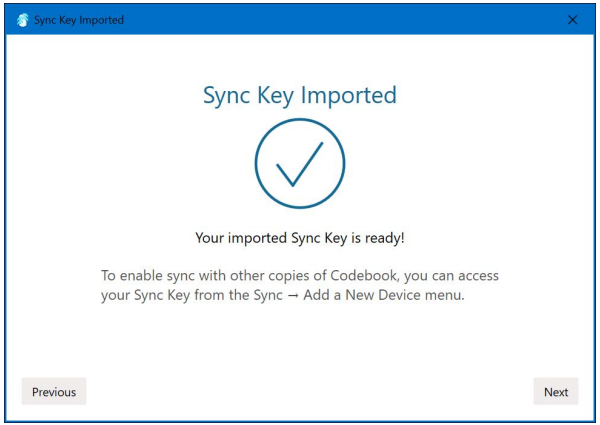
Since this is your initial Codebook setup

Click No, Next to generate your Sync Key

Your new Sync Key will be generated

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





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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

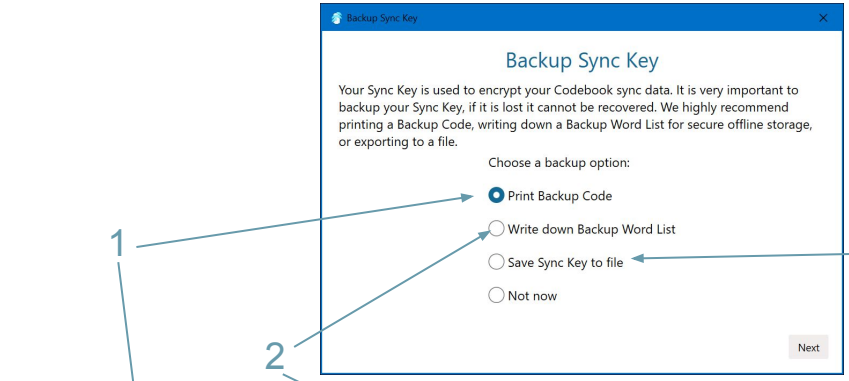
** Be sure to write down your Master Password of the device generating the backup in the space provided **

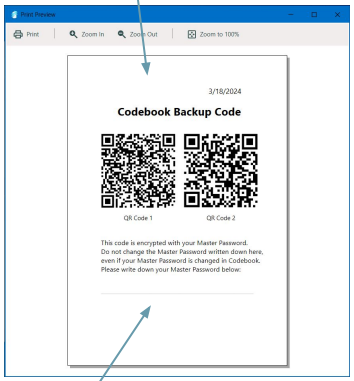
2. Write Down Word List
   - a list of 20 words that can be used to generate the same encryption key that is stored in your Sync Key.

Master Password not required to decrypt a Word List

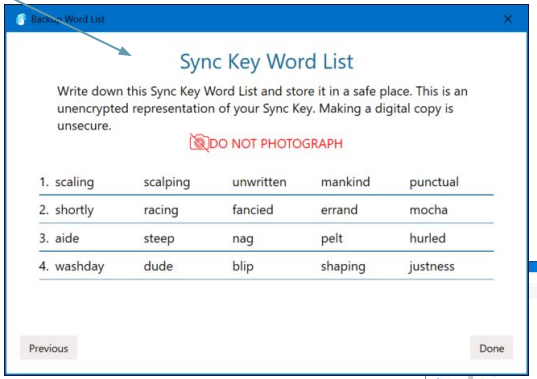
3. Save As File
   - creates a file that can be copied to another device for backup or import

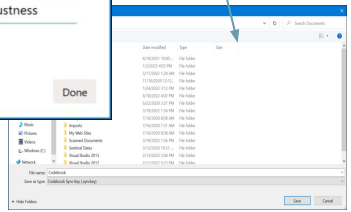
Master Password required to decrypt the file - be sure to keep a record of it





** write your Master Password**





Select location to save file

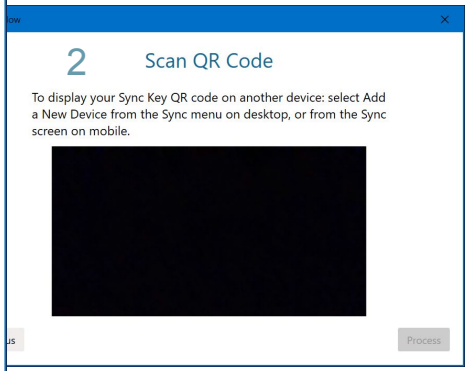
Codebook

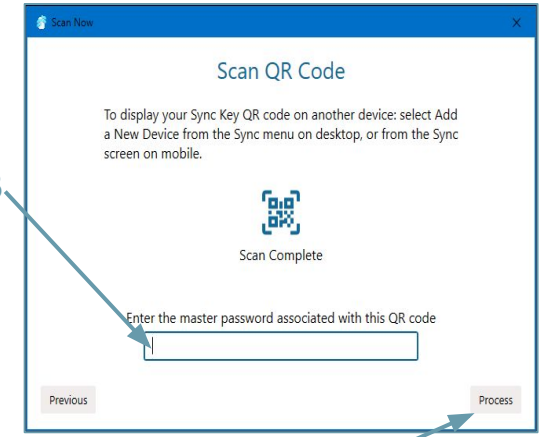
Import an Existing Sync Key **During Installation**

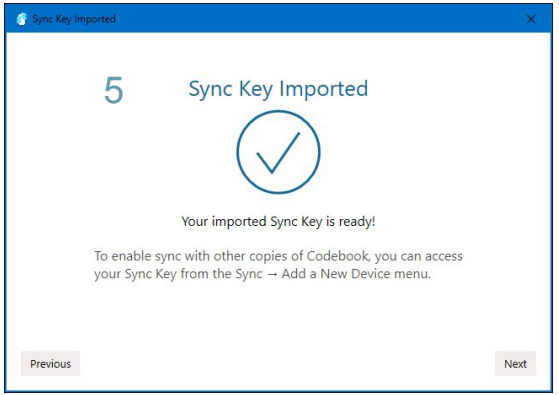
During initial setup, you will be given the option to Scan your Sync Key

1 - Click Scan Sync Key
2 - Scan Sync Key QR Code(s)
3 - Enter Master Password for Sync Key
4 - Click Process
5 - Confirmation of Successful Import

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







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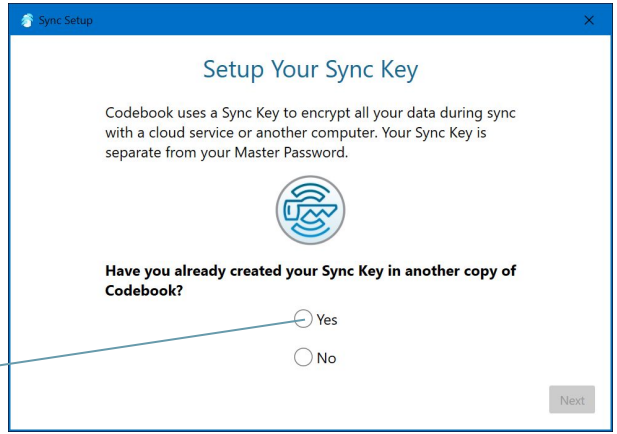
Import an Already Existing Sync Key

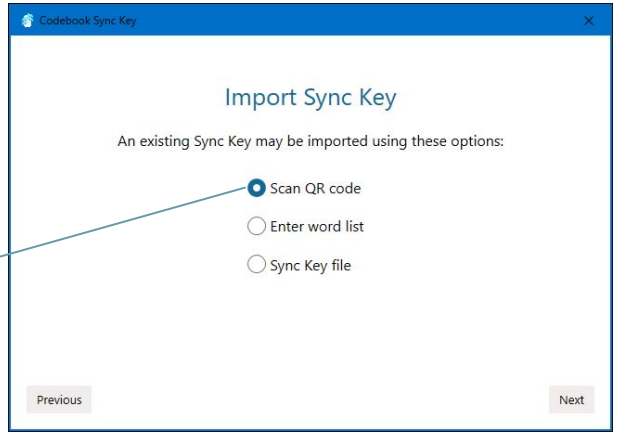
1. From the Sync Menu, tap Setup Sync Key
2. Since you already have a Sync Key, click Yes and you will be prompted to scan your Sync Key.

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:-
select Sync menu > Add a Device From the 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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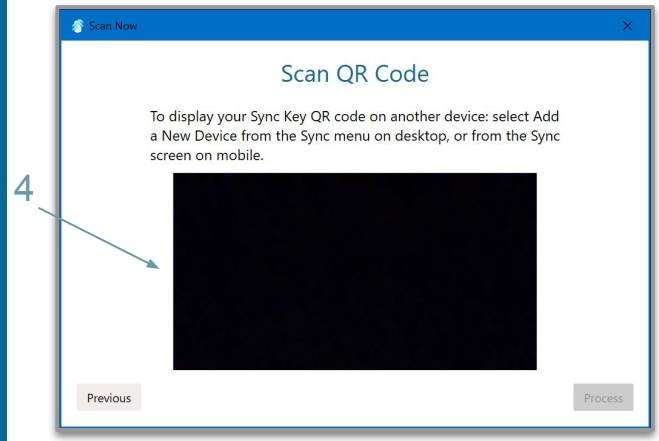
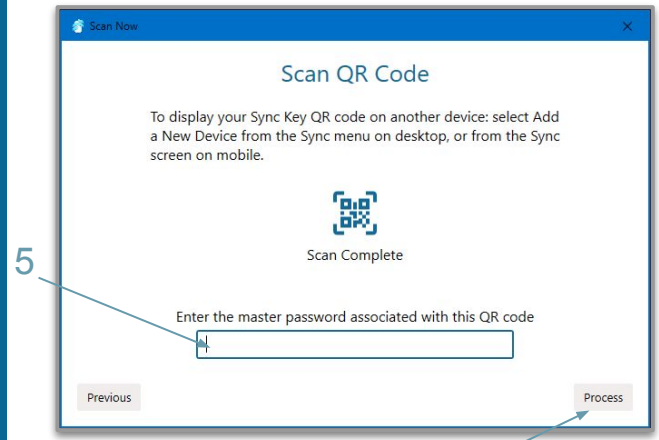
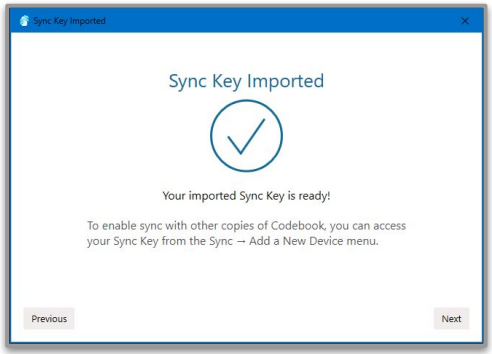
Import an Already Existing Sync Key
(continued)

Scan Sync Key:

4. Scan the QR code using your computer's camera
5. Enter the Master Password that was used when the Sync Key was created
6. Click Process







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Enter Word List to Import Sync Key

Enter Word List to Import Sync Key

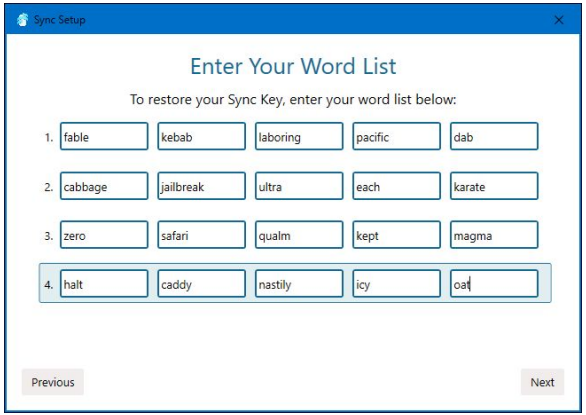
- Enter the 20 words in the Word List in order
- Click Next

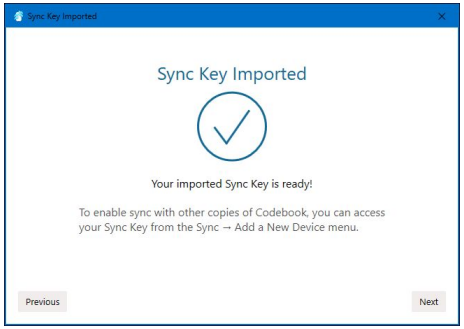
Import Sync Key File

1 - Select the location of the file *
2 - Click Open
3 - Enter your Master Password
4 - Click Import

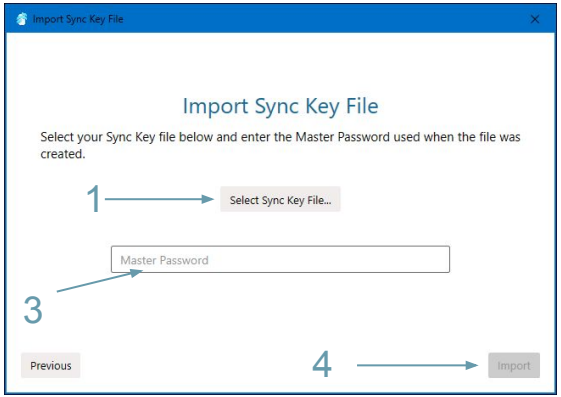
* the file was created with the name Codebook.synckey

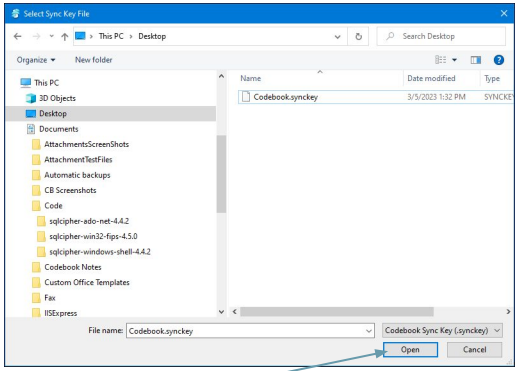
Word List:





Import File:





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Set Sync Preference

1. Select FIle - > Preferences -> Sync Tab

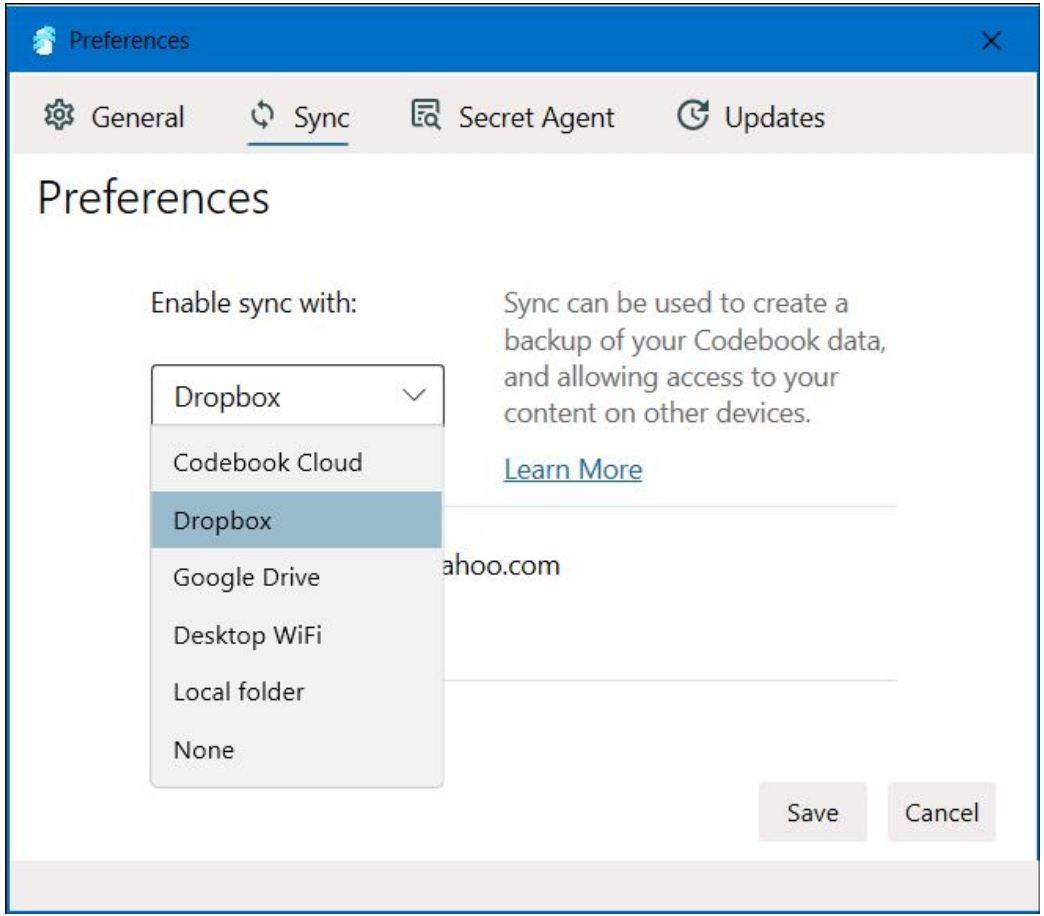
2. Select your Sync Service from the list.

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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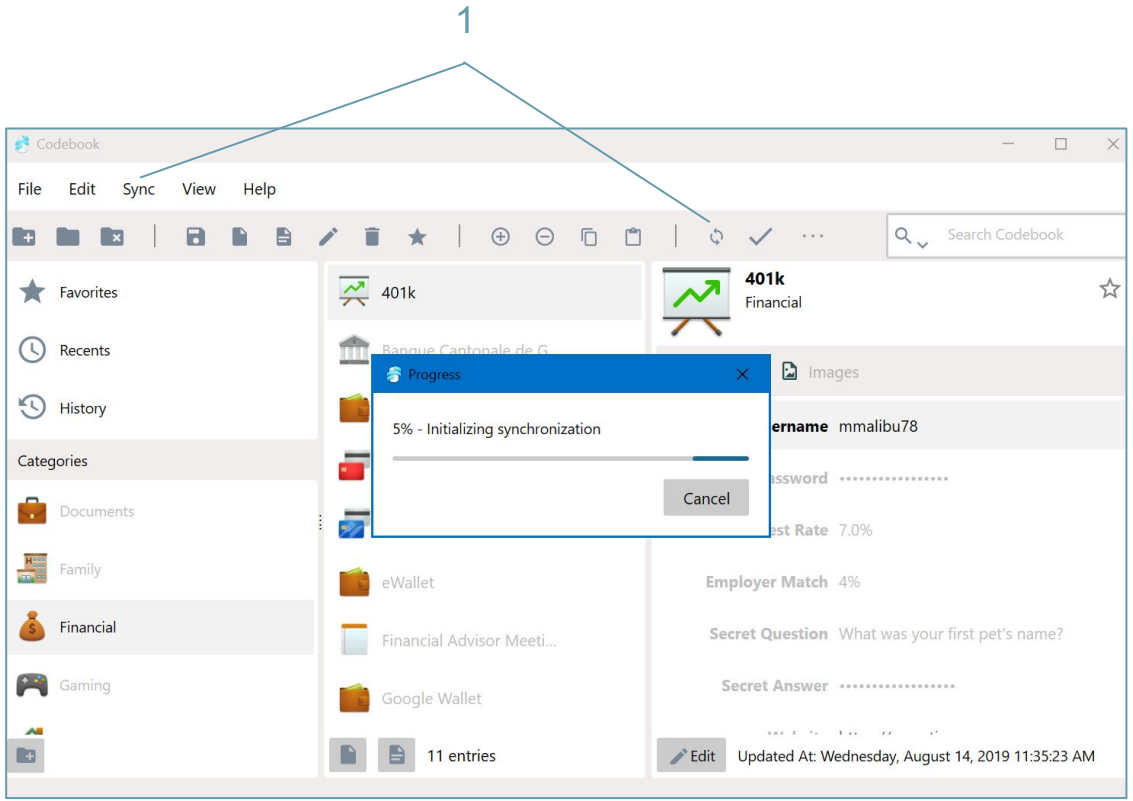
How to sync with a Cloud Service

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

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



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Cloud Service 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

Codebook

Important Preferences

Codebook

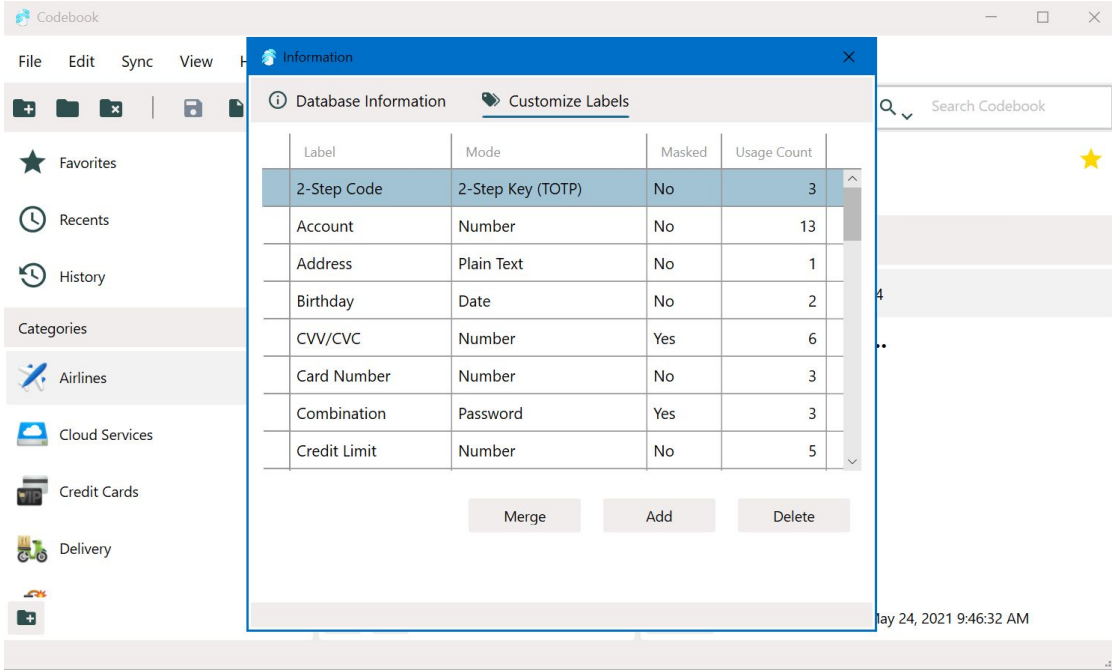
Customize Labels

Add new custom labels

Customize behaviors

Enable masking

Available under File -> Customize Labels



Codebook

Autolock

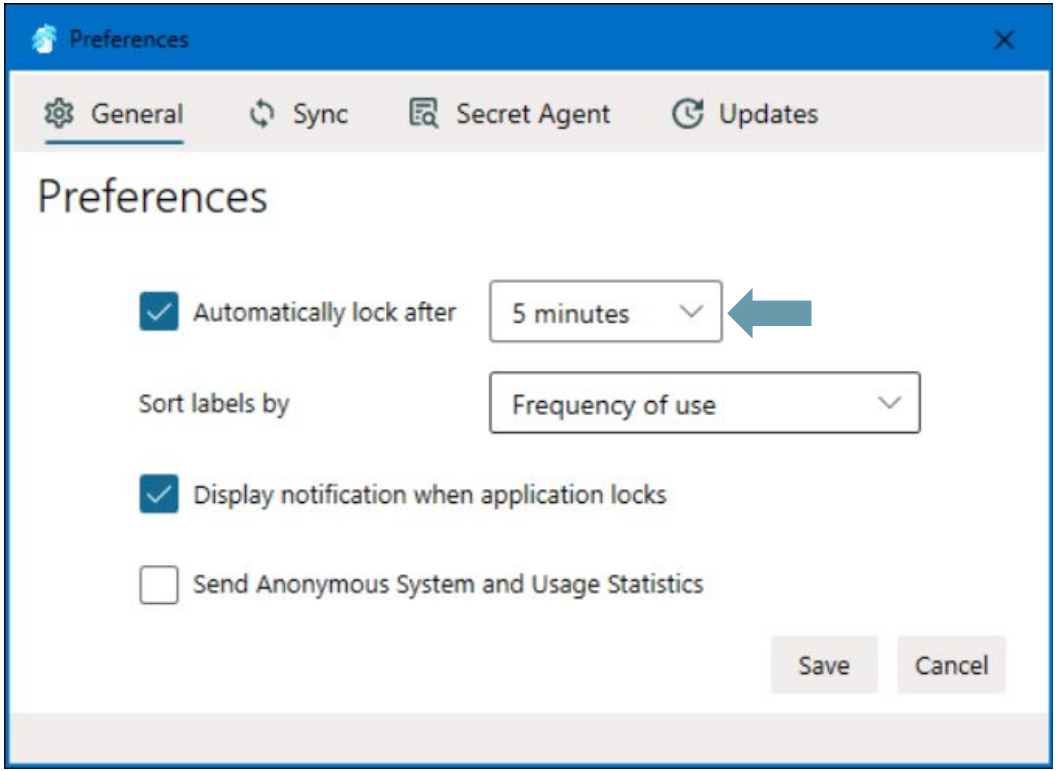
Leaves application unlocked for a designated period of time (default 5 minutes)

Automatically locks application when timer expires

Allows more convenient access without repetitious logins

Tip: Be careful, when autolock is enabled

Available under File -> Preferences

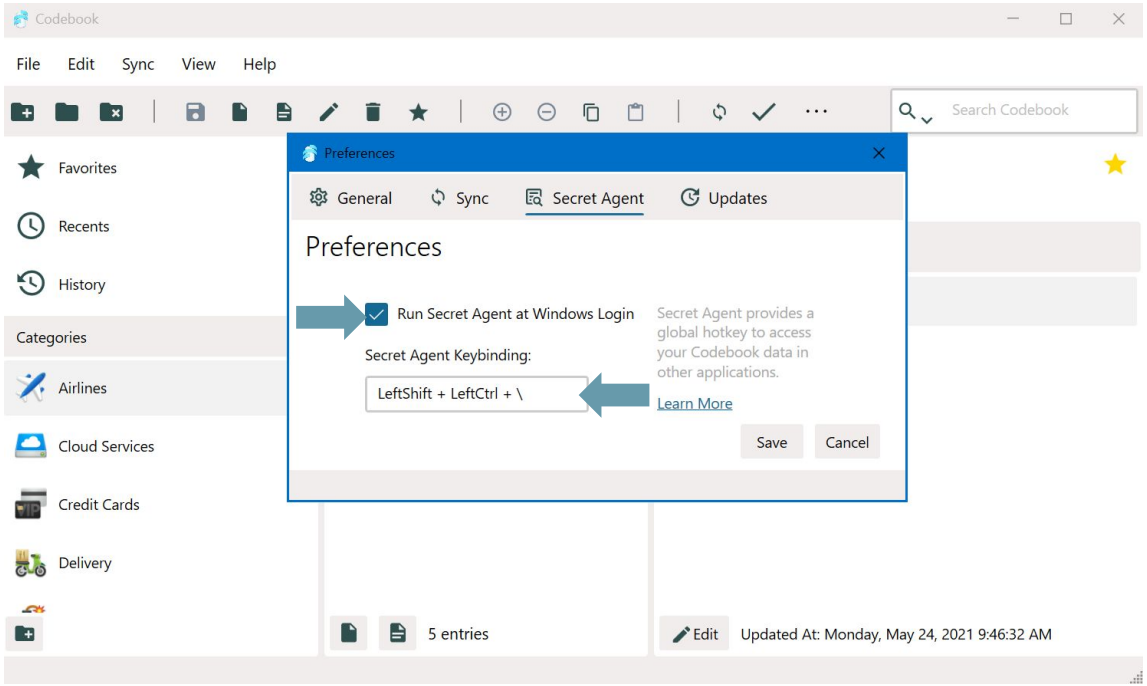


Codebook

Secret Agent

Choose the key sequence to launch Secret Agent

Enable Codebook and Secret Agent to launch on login (in a locked state)



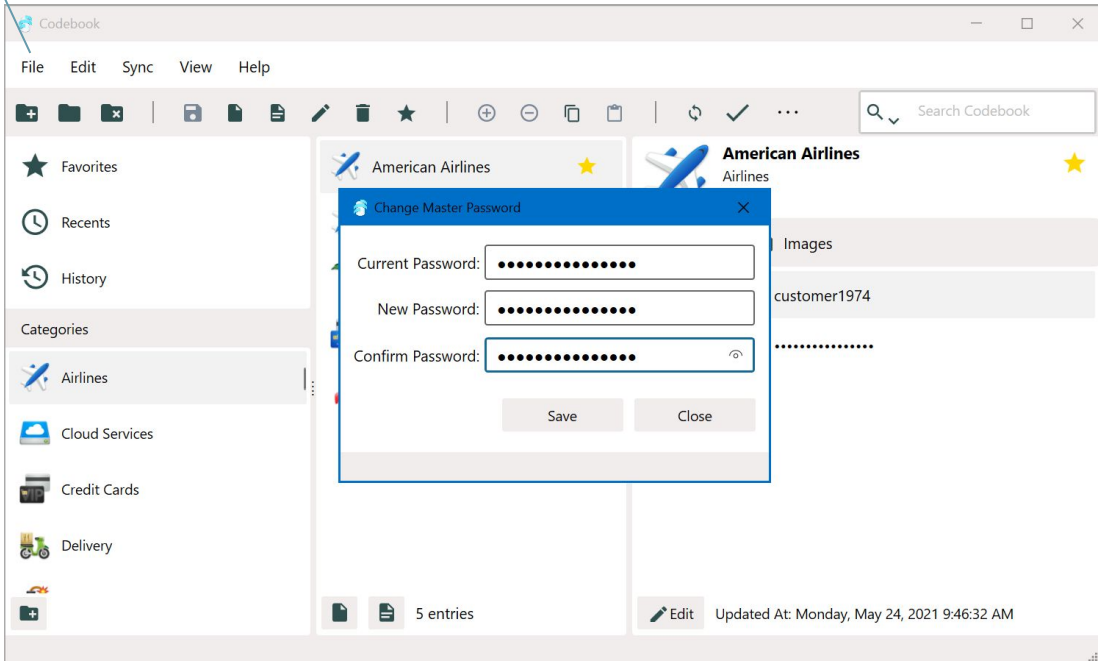
Codebook

Other Features

Codebook

Change Master Password

Available under File ->
Change Master Password

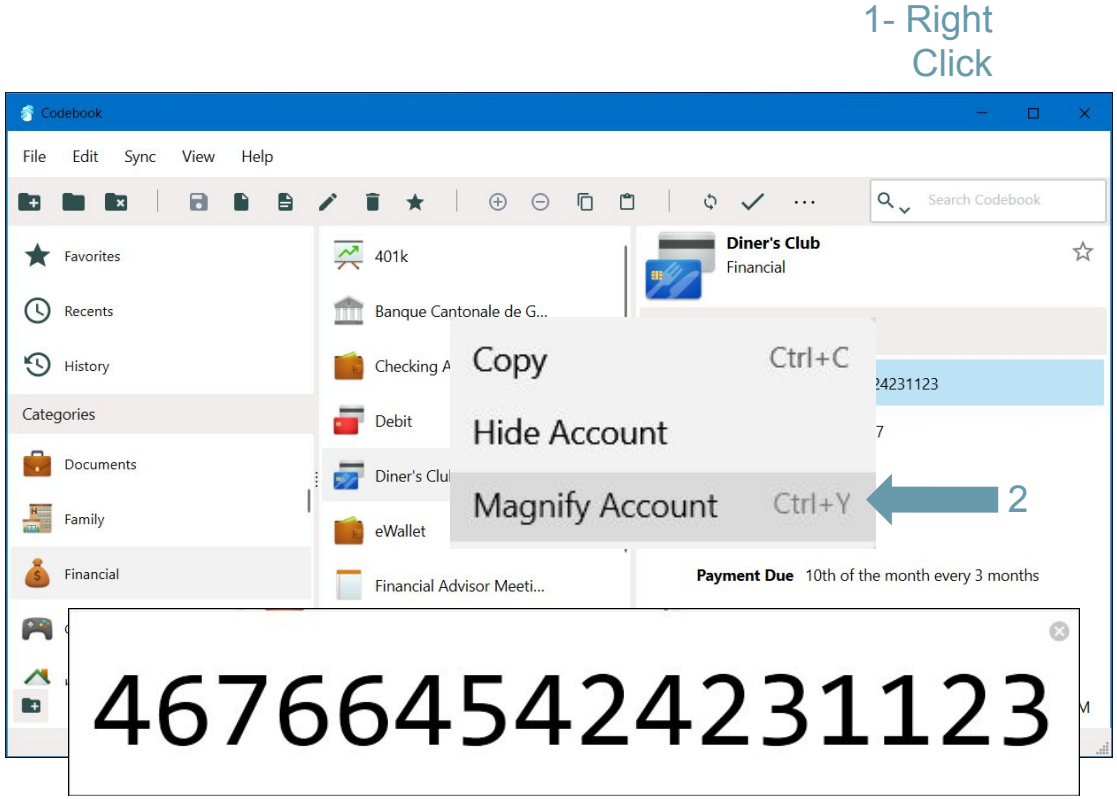


Codebook

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