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Glossary

Throughout this user guide, certain terms are used to refer to specific features within Secret Server:

Secret

A piece of information that is stored and managed within Secret Server is referred to as a Secret. Secrets are derived from Secret templates. Typical Secrets include, but are not limited to, privileged passwords on routers, servers, applications, and devices. Files can also be stored in Secrets, allowing for storage of private key files, SSL certificates, license keys, network documentation, Microsoft Word or Excel documents and more.

Secret Template

Secret templates are used to create Secrets and allow customization of the format and content of Secrets to meet company needs and standards. Examples include: Local Administrator Account, SQL Server Account, Oracle Account, Credit Card and Web Password. Templates can contain passwords, usernames, notes, uploaded files, and drop-down list values. New Secret templates can be created, and all existing templates can be modified.

Role-based Security

Secret Server uses role-based access control, which provides the ability to set strict, granular permissions for each user. All features in Secret Server are made available to users based on permissions, which collectively make up roles.

Unlimited Administration Mode

The emergency, "break-the-glass" feature. When this mode is enabled, your Secret Server administrators can access all content within the system, regardless of explicit permissions. Access to Unlimited Administration Mode is controlled using role permissions.

Logging in

Depending on how your administrators configured Secret Server, you will log in with either your Active Directory account OR a local account.

Logging in with an Active Directory account

On the login screen, enter your:

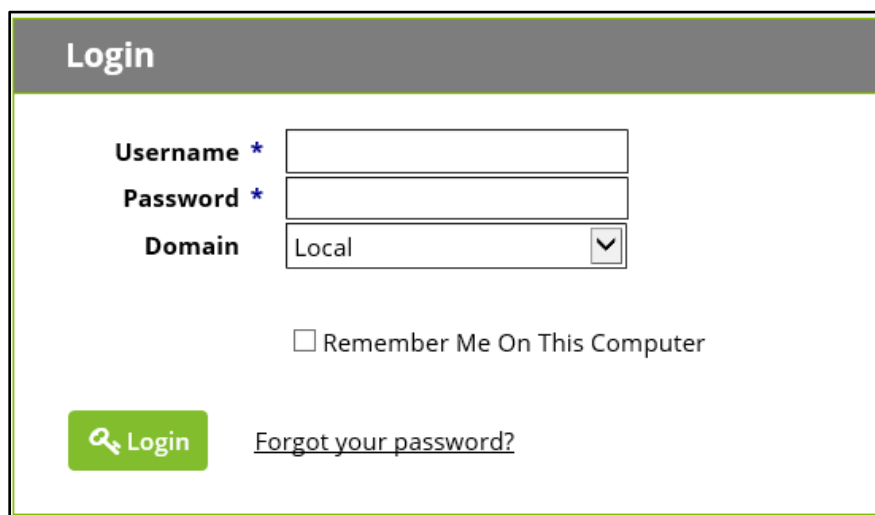
1. Active Directory username
2. Active Directory password
3. Select the appropriate domain from the list

Logging in with a local account

If your administrators configured local account logins for Secret Server, they will provide you with a username and a temporary password for your first login. On the login screen, enter:

1. Username
2. Temporary password, and
3. From the Domain dropdown, select “**Local**”

After you log in with your local account for the first time, you will be prompted to change your password immediately.




Login

Username *

Password *

Domain ▼

☐ Remember Me On This Computer

 [Forgot your password?](#)

Dashboard

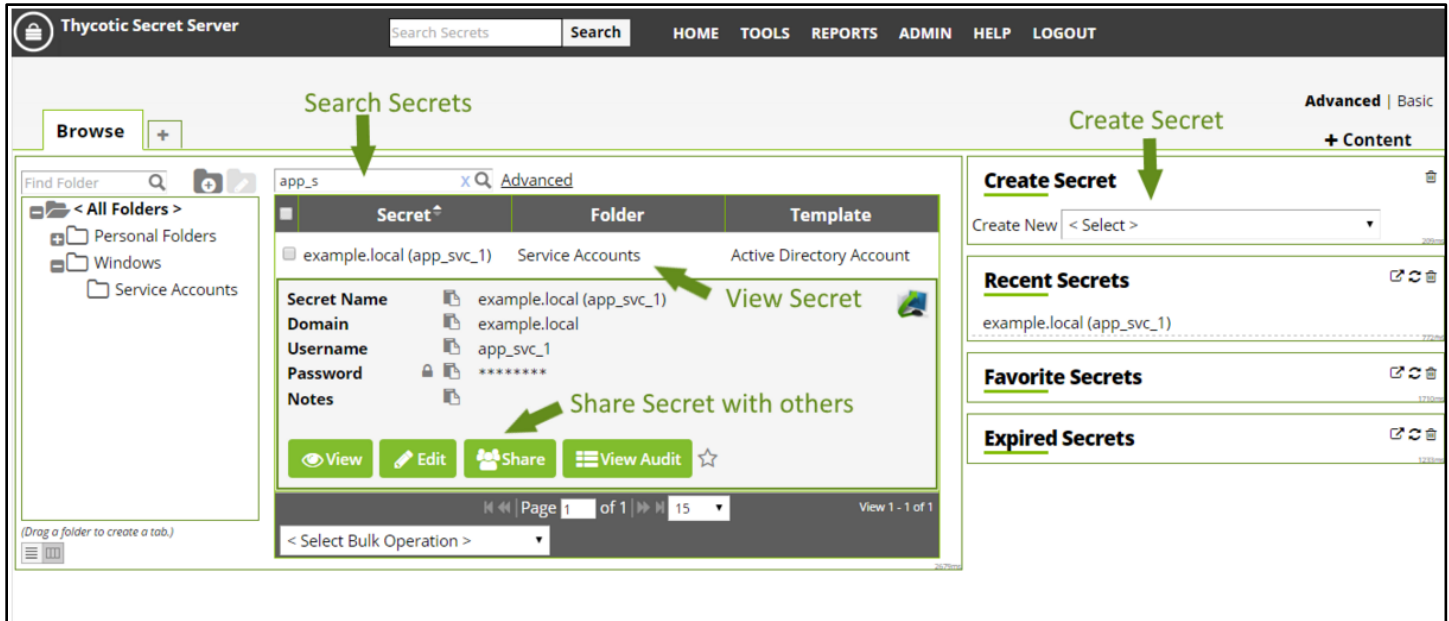
Dashboard is the main screen for searching and viewing Secrets. There are two Dashboard views available, Advanced and Basic.

Widgets / Options	Basic View	Advanced View
Create New Secret	✓	✓
Recent Secrets	✓	✓
Search Bar	✓	✓
Expired Secrets		✓
Favorite Secrets		✓
Out of Sync Secrets		✓
Reports		✓



Advanced View

Viewing the Advanced Dashboard requires the **View Advanced Dashboard** role permission. If you have this permission, you will also have the option to view the Basic dashboard.

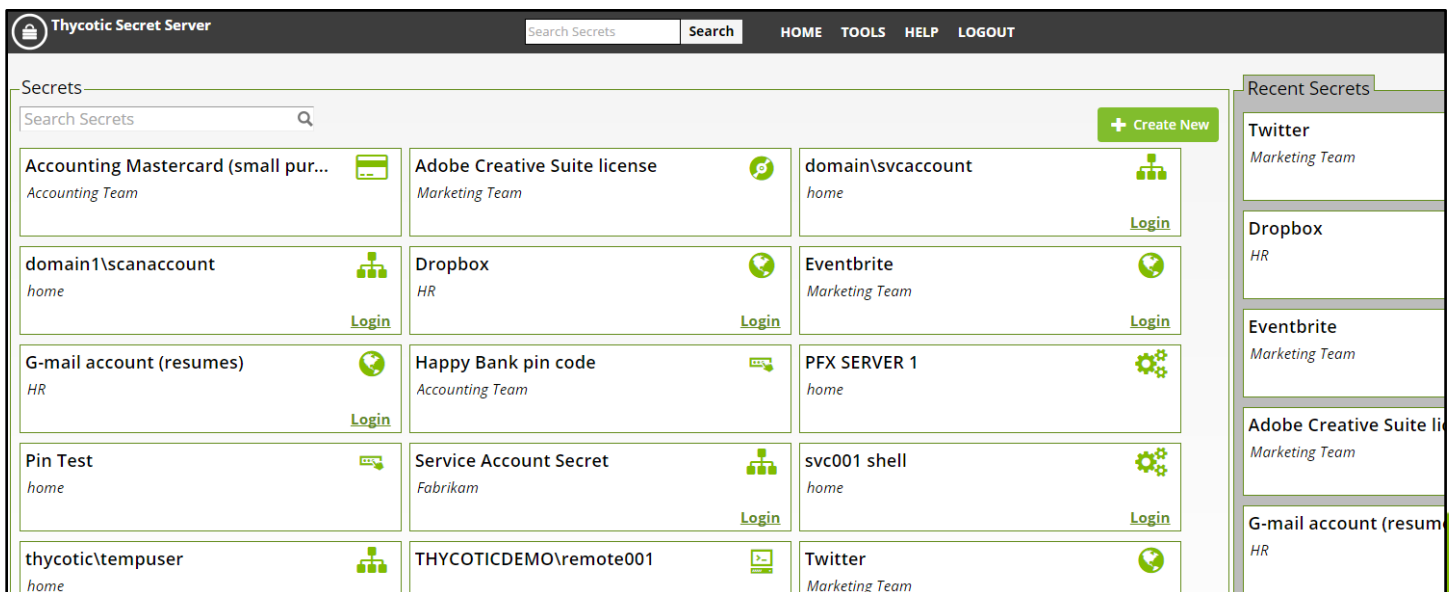


See a visual demo of the Advanced Dashboard here:

<https://my.thycotic.com/movies/secretserver/welcome/>

Basic View

A user without the “View Advanced Dashboard” permission is limited to the Basic view, which does not include use of any widgets aside from Recent Secrets.





Creating a Secret

Advanced View

Viewing the Advanced Dashboard requires the **View Advanced Dashboard** role permission.

1. From Dashboard, find the **Create Secret** widget.

The screenshot shows the 'Create Secret' widget. It has a title 'Create Secret' and a trash icon. Below the title is a dropdown menu labeled 'Create New' with the text '< Select >' and a downward arrow.

2. Select a template from the drop-down menu. For this example, we'll use a **Web Password**.
3. Enter the information for your Secret in the fields (fields with an asterisk * are required).
4. If you want to organize the Secret into a specific folder, click the folder name listed, and select the desired folder. Otherwise, click **Clear** to store the Secret at the root level.
5. Click **Save** to save your settings.

(Other save options)

6. Click **Save and Share** to share the Secret with another user or group.
7. Click **Save and Add New** to save this Secret, and create another Secret with the same template.

The screenshot shows the 'New' form for creating a secret. The 'General' tab is selected. The form includes the following fields and options:

- Secret Template:** A dropdown menu showing 'Web Password'.
- Secret Name:** A text field with the value 'G-mail account (resumes)'.
- URL:** A text field with the value 'www.gmail.com'.
- UserName:** A text field with the value 'acmecompanyjobs@gmail.com'.
- Password:** A text field with masked characters '.....'. To the right of the field is a 'Generate' button and a 'Strong' indicator with a green checkmark.
- Notes:** A text area with the value 'This is the inbox for resume submissions'.
- Folder:** A dropdown menu showing 'VHR' and a 'Clear' link.
- AutoChange?:** A checkbox that is currently unchecked.

At the bottom of the form are four buttons: 'Save', 'Save and Share', 'Save and Add New', and 'Cancel'.



Basic View

1. From Dashboard, find the **Create New** button.
2. Select a template from the drop-down menu. For this example, we'll use a **Web Password**.
3. Enter the information for your Secret in the fields (fields with an asterisk * are required).
4. If you want to organize the Secret into a specific folder, click the folder name listed, and select the desired folder. Otherwise, click **Clear** to store the Secret at the root level.
5. Click **Save** to save your settings.

(Other save options)

6. Click **Save and Share** to share the Secret with another user or group.
7. Click **Save and Add New** to save this Secret, and create another Secret with the same template.

Viewing a Secret

To view the information contained in a Secret (such as password or special notes), navigate to the Home page (your dashboard). From there, click on the Secret name, then click “View”.

The screenshot shows the Thycotic Secret Server interface. At the top is a navigation bar with the Thycotic logo, a search bar labeled 'Search Secrets', and links for HOME, TOOLS, HELP, and LOGOUT. Below this is a header for the specific secret: 'G-mail account (resumes) (Web Password)'. The main content area has three tabs: 'General' (selected), 'Personalize', and 'Launcher'. Under the 'General' tab, the following fields are displayed: 'Secret Name' (G-mail account (resumes)), 'URL' (www.gmail.com), 'UserName' (acmecompanyjobs@gmail.com), 'Password' (masked with asterisks and labeled 'Strong' with a green checkmark), 'Notes' (This is the inbox for resume submissions), 'Folder' (\HR), 'Expiration' (Expires in 89 days. (Expires every 90 day(s))), and 'Favorite?' (checkbox). Below these fields is a 'Web Password Filler' section with a globe icon and a link 'How do I use the Web Password Filler?'. At the bottom of the page is a row of action buttons: Back, Edit, Copy Secret, Share, View Audit, Expire Now, Delete, and Convert Template.



Icon definitions

The icons below will perform the following operations when clicked:



Lock Unmask a field until the cursor is moved away from the icon.



History Display the history of changes to the field.



Copy Copy the field to the clipboard. You may need an add-on for this to function.



NATO Display the field using the NATO phonetic alphabet. This is helpful when communicating a password over the phone.

Common Configuration Options

Listed below are configuration options that are common to every Secret:

Folder

Folder location of the Secret. The Secret will inherit permissions of this folder depending on the Default Secret Permissions setting in the Secret Server Configuration options.

Favorite

Click the star from the Dashboard or check this box on the Secret View page to mark the Secret as a favorite. It will then be displayed in the Favorite Secrets widget.



Edit

Edit the Secret fields.



Copy Secret

Create a duplicate copy of the Secret that can be renamed and modified.



Share

Configure the sharing settings, or permissions, for the Secret.



View Audit

View the Secret audit log to see which users have accessed the Secret.



Delete

Delete the Secret.



Convert Template

Change which template is being used to store and display information in this Secret.



Editing a Secret

To edit a Secret, navigate to its Secret View page and click **Edit**. All fields will become editable. For passwords, you can create a random, unique, password with the Generate button.

Note Editing passwords in a secret template does not update the password within accounts managed outside of Secret Server.

Thycotic Secret Server

Search Secrets Search HOME TOOLS HELP LOGOUT

G-mail account (resumes) (Web Password)

General Personalize Launcher

Secret Name * G-mail account (resumes)

URL * www.gmail.com

UserName * acmecompnyjobs@gmail.com

Password * [Masked] [Generate](#) Strong ✓

Notes This is the inbox for resume submissions

Folder * [Folder Icon] VHR [Clear](#)

[Save](#) [Cancel](#)

Deleting a Secret

To delete a Secret, navigate to the Secret View page and click **Delete**.

Sharing a Secret

Sharing passwords is crucial for collaborative teams. Due to the sensitive nature of sharing secure information, Secret Server takes all necessary security measures to ensure that shared passwords are tracked and protected.

There are four permission levels to choose from when sharing Secrets with another user or group:



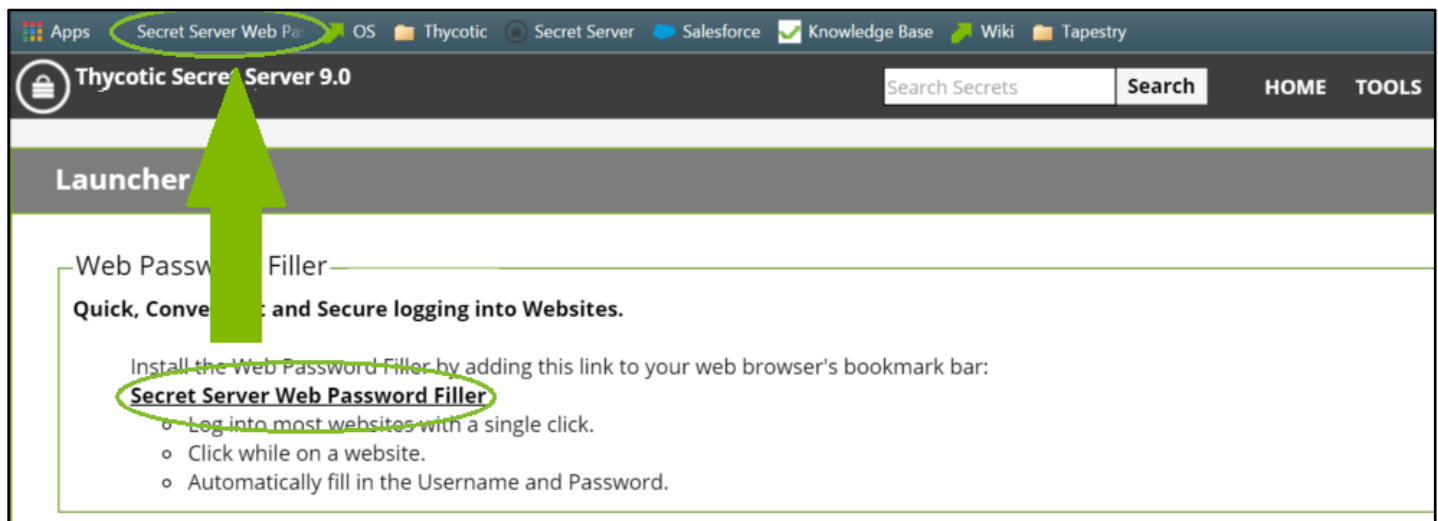
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- View** Allows the user to see all Secret data (fields – username, password, etc.) and metadata (permissions, auditing, history, security settings, etc.).
- Edit** Allows the user to edit the Secret data (username, password, etc.). Also allows users to move the Secret to another folder unless Inherit Permissions from Folder is turned on, in which case the user needs Owner permissions to move the Secret.
- List** Allows the user to see the secret in a list (such as a list returned by running a search) but not to view any more details about a Secret or edit it.
- Owner** Allows the user to change all the Secret metadata (permissions, security settings, etc.).

Web Password Filler

Within Tools > Launcher Tools is a Web Password Filler.

The Web Password Filler is a login helper that can be used on web sites with a login page. To use the Web Password Filler, drag the **“Secret Server Web Password Filler”** link up to your web browser’s Bookmarks Toolbar.



The link can be used for any Secret that has the **Web Password** template.

When you are on the login page for a web site that has a matching Web Password secret, you can click this Web Password Filler link, and a Secret Server dialog box will pop up, asking which credentials you want to use. It will automatically display the best option(s) for possible Secrets you can use to login. Select the right one, and the Web Password Filler will autofill the fields on the form and logs you in.

Note If you try to use the Web Password Filler without being signed in to Secret Server, a box will prompt you to log into Secret Server before displaying available secrets to use on a site.