

IBM Security Secret Server
Version 10.4

End User Guide

Contents

Glossary	1
Logging In.....	2
Logging in with an Active Directory account	2
Logging in with a local account.....	2
Dashboard	3
Advanced View.....	3
Basic View	4
Creating a Secret.....	5
Advanced View.....	5
Basic View	6
Viewing a Secret	7
Icon definitions	7
Common Configuration Options	7
Editing a Secret.....	9
Deleting a Secret.....	10
Sharing a Secret.....	11

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, user names, 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 sets 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 by 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:

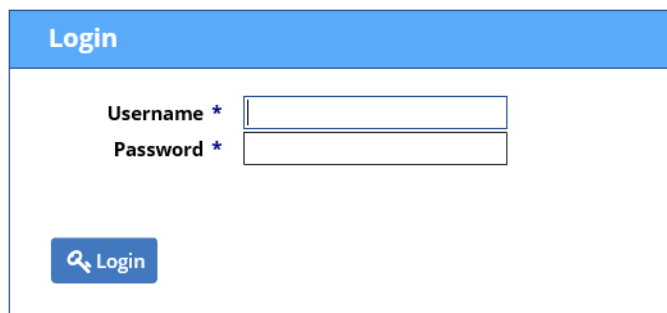
1. Active Directory user name
2. Active Directory password
3. Select the appropriate domain from the list.

Logging in with a local account

If your administrators configured local account logins for Secret Server, they provide you with a user name 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.



The image shows a login interface with a blue header labeled "Login". Below the header, there are two input fields: "Username *" and "Password *". At the bottom left, there is a blue button with a magnifying glass icon and the text "Login".

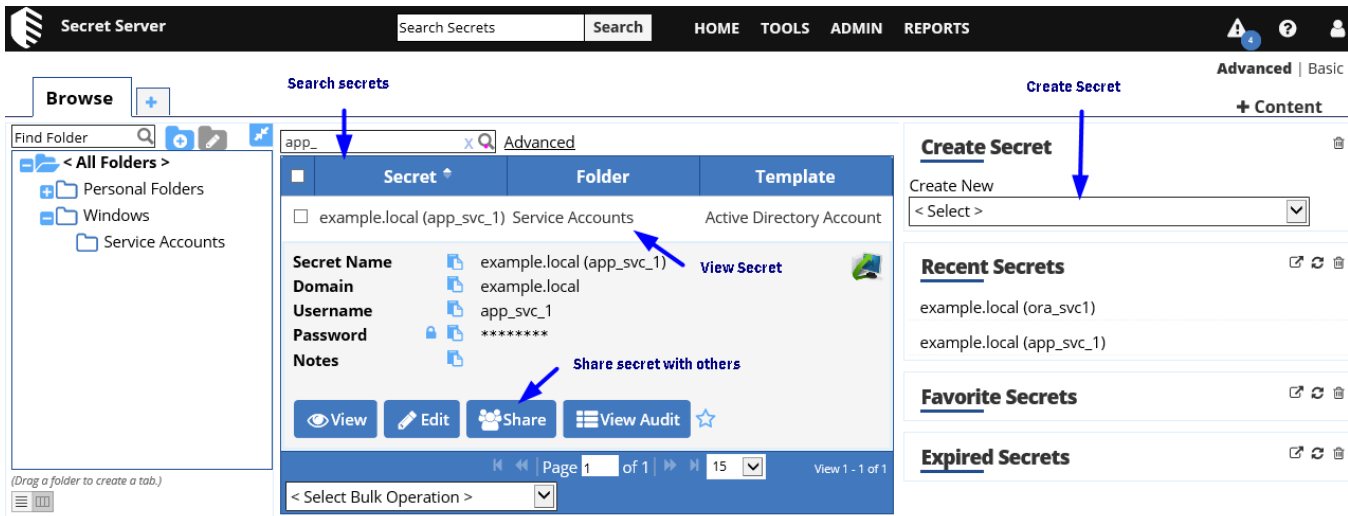
Dashboard

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

Widgets or 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 can view the Basic dashboard.



See a visual demonstration of the [Advanced Dashboard here](#).

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.

The screenshot displays the Secret Server interface in the Basic View. The top navigation bar includes the Secret Server logo, a search bar for secrets, and menu items for HOME, TOOLS, ADMIN, and REPORTS. The main content area is divided into two sections: 'Secrets' and 'Recent Secrets'.

Secrets Section: This section features a search bar and a '+ Create New' button. It contains a grid of secret cards, each with a title, a user name (Lois Lane), and a 'Login' link. The cards are:

- Adobe Creative Suite License (Lois Lane)
- Box (Lois Lane)
- Eventbrite (Lois Lane)
- example.local (app_svc_1) (Service Accounts)
- example.local (ora_svc1) (Service Accounts)
- Gmail (Lois Lane)
- Happy Bank pin code
- Twitter (Lois Lane)

Recent Secrets Section: This section is titled 'Recent Secrets' and shows a list of the most recent secrets, each with a 'Login' link:

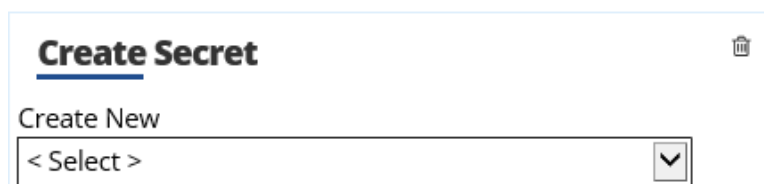
- Twitter (Lois Lane)
- Box (Lois Lane)
- Gmail (Lois Lane)
- Adobe Creative Suite License (Lois Lane)

Creating a Secret

Advanced View

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

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



2. Select a template from the drop-down menu. For this example, 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 that is 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.

New

General

Secret Template	Web Password
Secret Name	* Green Example Mail Account (resumes) ×
URL	* www.gmail.com
UserName	* jkecompanyjobs@gmail.com
Password	* •••••••• Generate Strong ✓
Notes	This inbox is for resume submissions.
Folder	📁 \HR Clear
Inherit Secret Policy	<input checked="" type="checkbox"/>
Secret Policy	< No Policy >

Save Save and Share + Save and Add New × Cancel

Basic View

1. From Dashboard, find the **Create New** button.
2. Select a template from the drop-down menu. For this example, 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 that is 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 that is contained in a Secret (such as password or special notes), navigate to the Home page (your dashboard). From there, click the Secret name, then click “View”.

The screenshot shows the Secret Server interface. At the top, there is a navigation bar with the 'Secret Server' logo, a search box labeled 'Search Secrets', and a 'Search' button. To the right of the search box are links for 'HOME', 'TOOLS', 'ADMIN', and 'REPORTS'. Below the navigation bar is a blue header for the selected secret: 'Green Example Mail Account (resumes) (Web Password)'. The main content area has several tabs: 'General', 'Personalize', 'Expiration', 'Launcher', and 'Security'. The 'General' tab is active, displaying the following details:

- Secret Name:** Green Example Mail Account (resumes)
- URL:** www.gmail.com
- UserName:** jkecompanyjobs@gmail.com
- Password:** *****
- Notes:** This inbox is for resume submissions.
- Status:** Active
- Folder:** \HR
- Inherit Secret Policy:** Yes
- Secret Policy:** < No Policy >
- Favorite?:**

Below the details is a 'Web Password Filler' section with a globe icon and a green arrow, and a link: 'How do I use the Web Password Filler?'. At the bottom of the main content area is a row of action buttons: 'Back', 'Edit', 'Copy Secret', 'Share', 'View Audit', 'Delete', and 'Convert Template'.

Icon definitions

The icons perform the following operations:


- 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 might need an add-on for this feature to function.
- NATO** Display the field by using the NATO phonetic alphabet. This phonetic alphabet is helpful when you communicate a password over the phone.


Common Configuration Options

The following configuration options are common to every Secret:

Folder Folder location of the Secret. The Secret inherits permissions of this folder that depends 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 display 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 that 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 become editable. For passwords, you can create a random, unique, password by clicking **Generate**.

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

The screenshot shows the 'Secret Server' interface. At the top, there is a navigation bar with 'Secret Server', a search box labeled 'Search Secrets', and a 'Search' button. To the right are links for 'HOME', 'TOOLS', 'ADMIN', and 'REPORTS'. Below this is a blue header bar with the text 'Green Example Mail Account (resumes) (Web Password)'. The main content area has several tabs: 'General', 'Personalize', 'Expiration', 'Launcher', and 'Security'. The 'General' tab is selected. It contains the following fields:

- Secret Name:** *Green Example Mail Account (resumes) [X]
- URL:** *www.gmail.com
- UserName:** *jkecompanyjobs@gmail.com
- Password:** * [Masked Password] [Generate]
- Notes:** This inbox is for resume submissions.
- Folder:** [Folder Icon] \HR Clear
- Inherit Secret Policy:**
- Secret Policy:** < No Policy >

At the bottom left, there are two buttons: 'Save' and '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.

You can choose from four permission levels when you share Secrets with another user or group:

- View** Allows the user to see all Secret data (fields – user name, password, and so on) and metadata (permissions, auditing, history, security settings, and so on).
- Edit** Allows the user to edit the Secret data (user name, password, and so on). 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, and so on).