

# Connection Manager: User Manual

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## Connection Manager for Windows 1.0.1

## Connection Manager for macOS 1.0.0

November 11, 2019

**Note:** The PDF version of this online document is automatically generated and thus may have minor formatting anomalies.

**Note:** This document is not updated with every release—many releases do not affect the guide's contents and thus do not warrant a document update.

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# Introduction

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## Overview

Connection Manager (CM) is a program for initiating and maintaining one or more connections from a computer desktop to remote servers or processes using standard remote protocols such as Windows Remote Desk Protocol (RDP) and Unix Secure SHell (SSH).

It marks an expansion of Thycotic's product line to include remote connectivity tools closely integrated with Secret Server. It permits technical staff to quickly access resources using the convenience of a familiar, rich desktop interface while maintaining all the safeguards and workflows included with Secret Server.

This manual includes instructions for installing and using Connection Manager as a stand-alone product or in conjunction with a Secret Server installation.

## Prerequisites

Connection Manager is a client-side application that can be installed on either Windows or Apple OS X operating systems.

### Minimum requirements for client-side installation:

- Windows Installation: Windows 7 or later, 8GB RAM
- Macintosh Installation: OS X 10.13x (High Sierra) or later, 8GB RAM.

### Minimum requirements for connectivity to Secret Server(s):

Secret Server Installation: 10.7 or later

## Installing Connection Manager

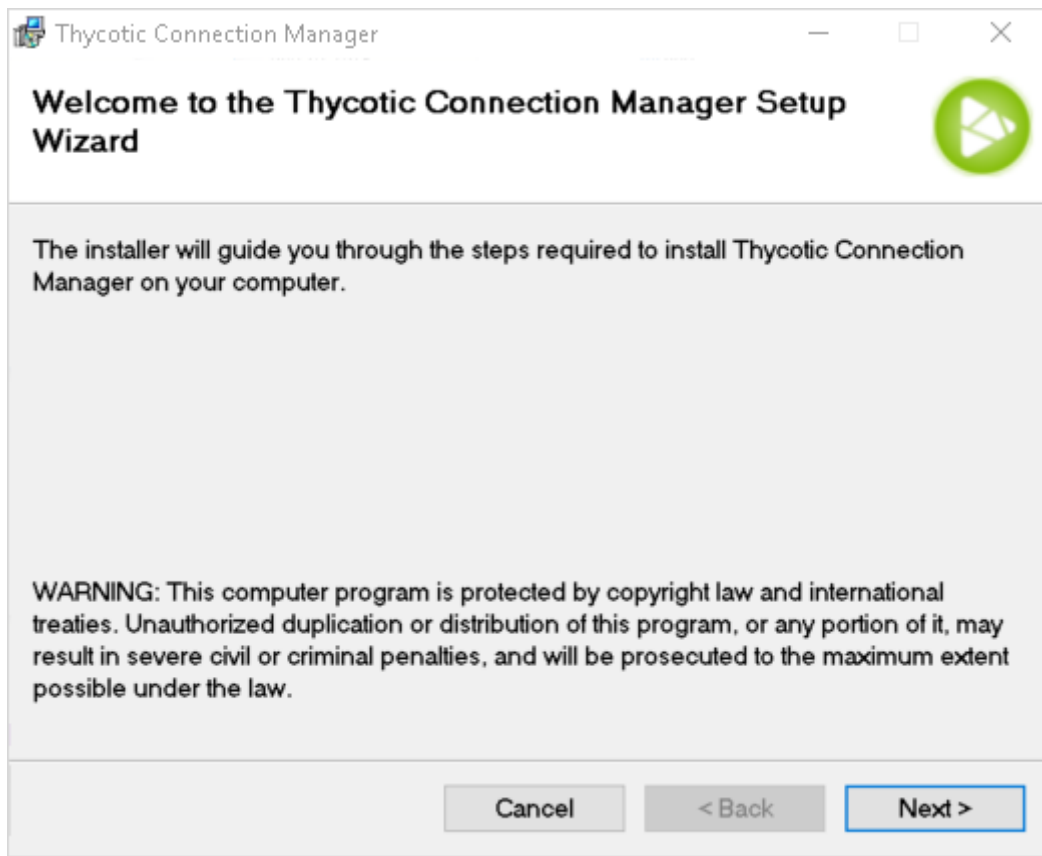
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Connection Manager is a desktop client application that can be downloaded and installed on Windows and Mac machines. While the client application does not need to be installed in the same location as Secret Server, if users are planning to use the Secret Server integration, the machine that Connection Manager is installed on must be able to reach Secret Server. Connection Manager creates a local encrypted file storage for saving local connections and Secure Server(s) connectivity information.

For details on the installation of Connection Manager, please follow the below procedures.

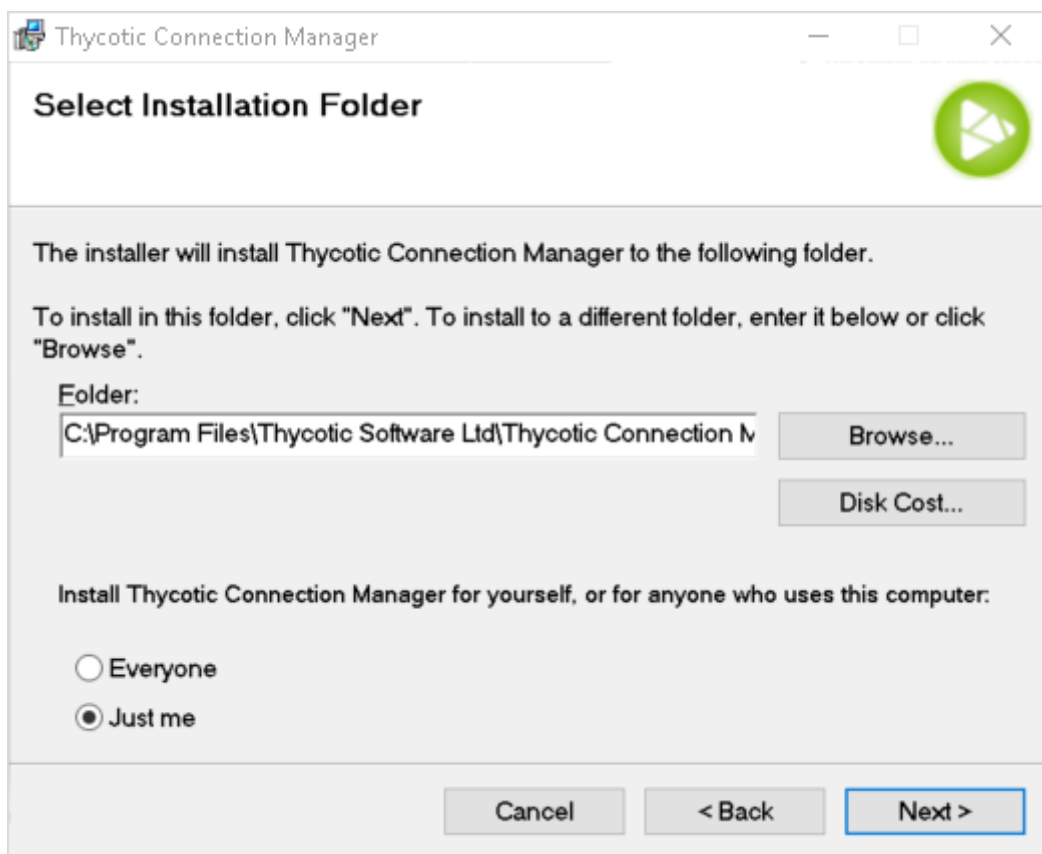
## Windows Installation

1. Download the [Windows Installer File \(MSI\) for Connection Manager](#).
2. Double-click the **MSI file** to start the install process and click **Next** to continue.



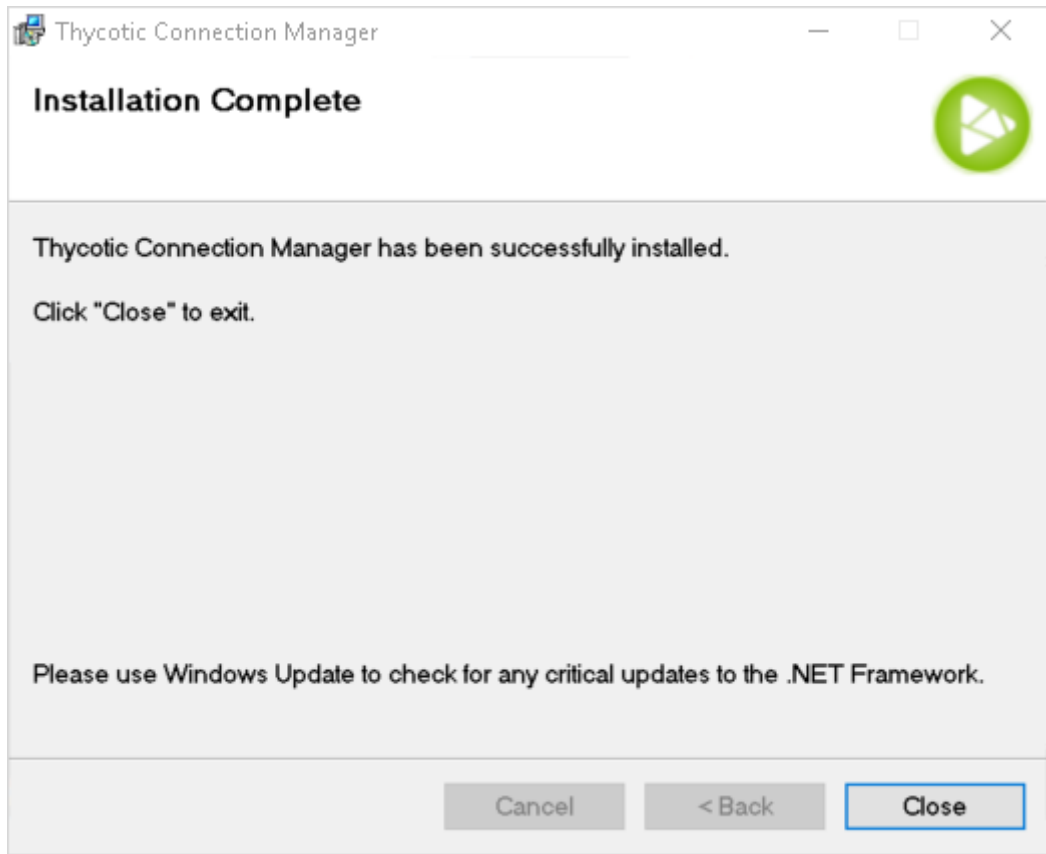
3. Select the **location to install Connection Manager** or leave the default location.

**Note:** The user may also choose to allow anyone on the machine to run Connection Manager, or it may only be accessible to the current user. To make it available to everyone, select the **Everyone** radio button. To make it available only to the current user account, select **Just me**.



4. Click **Next** to confirm the location and accessibility for the install.

5. Click **Next** again to start the installation. A progress bar will be displayed while the installation is in progress.
6. Once the install has finished, click **Close**.



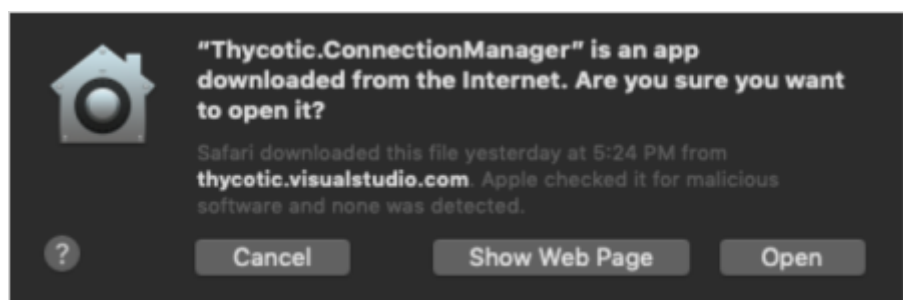
The install is complete, and the Connection Manager icon will be added to the desktop for easy access. When the Connection manager application is launched, users are prompted with an update message if there is a new release is available. If you would like to update, click the **Update** button.

## Apple OSX Installation

1. Download the DMG file from Thycotic's [Free IT Tools](#) page.
2. Select **Mac** download. A DMG file will download to your system.
3. Navigate to the DMG file and double-click to open, or right-click and select **Open**. The install window opens.
4. Click, drag, and drop the Thycotic Connection Manager logo to the Applications folder. The installation begins.



5. Once Connection Manager has been added, close the installer window.
6. You can now run the Connection Manager application. If you receive the following message on your install, click **Open**.



## Getting Started

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### Creating a Password

When Connection Manager is launched for the first time, or if no file storage is detected, you must create a secure password for this vault.

**Important:** If this password is lost, the saved connections are not recoverable and will have to be re-entered.

1. Enter the local password and start the application, the following window appears:

**Create Storage for Connections**

Connection Manager needs to create a secure storage file for your local connections.

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Password\*

Must include 8 characters, 1 upper, 1 lower, 1 number and 1 symbol (@#\$\$%)

Confirm Password\*

2. Enter the **password** to start the application.
3. **Reenter** to confirm password and click **Create**.

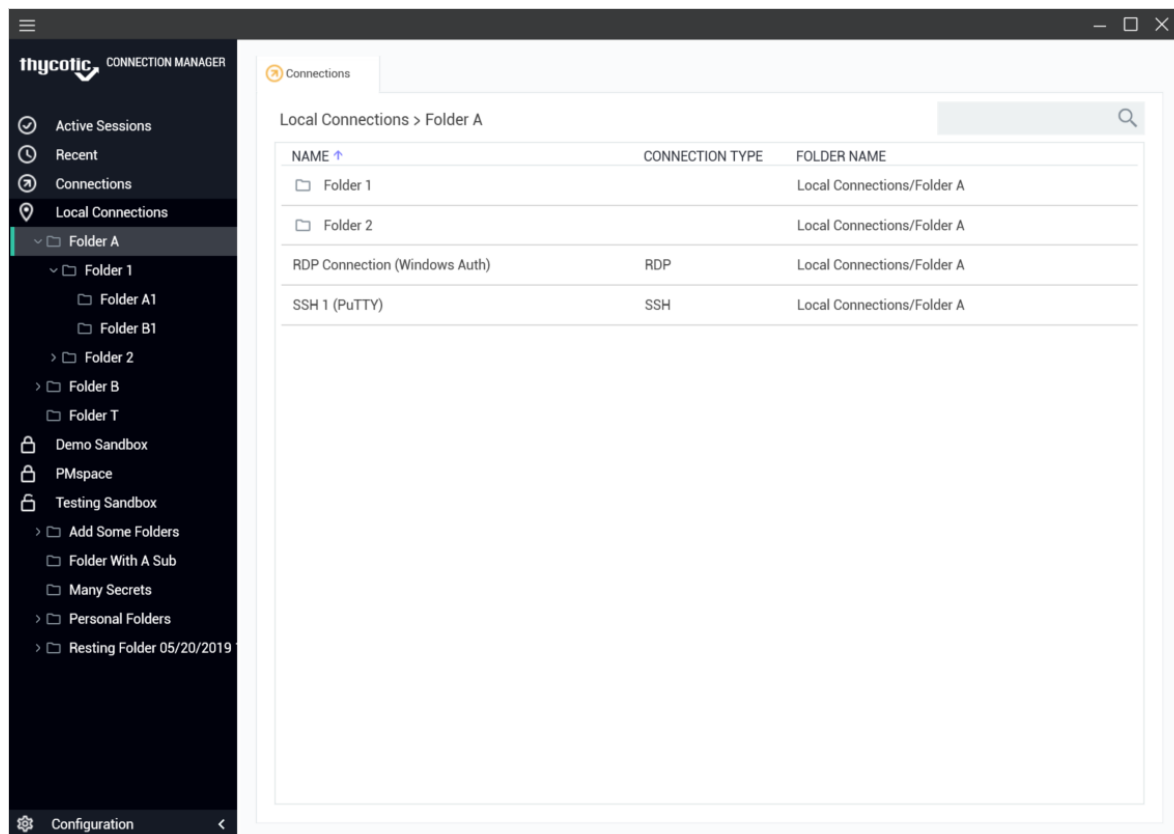
**Note:** If a local storage file exists but a user wishes to create a new one, click **Create new local storage file link** at the bottom left of the window. This will overwrite any existing storage file and any data stored there.

## User Interface Components

Users of Secret Server's modern interface will find Connection Manager's interface and functionality to be similar in look and feel. The interface takes advantage of some client-side functionality such as right-click menus, double-click menus, and others.

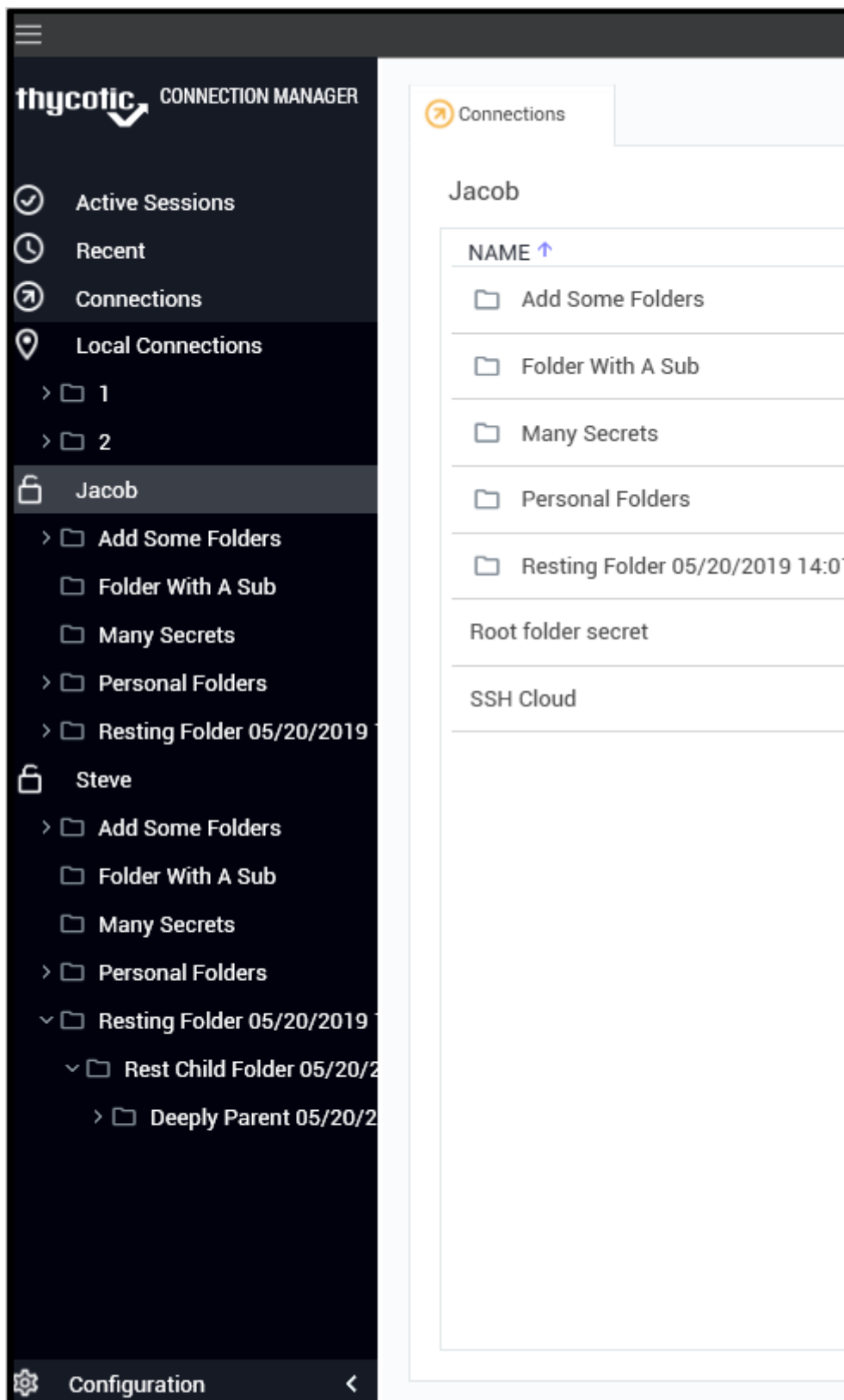
### Main Screen

The main screen consists of two components: the navigation tree (which may be minimized) on the left and the tabbed work area to the right. The two sections work in concert with each other.



## Navigation Tree

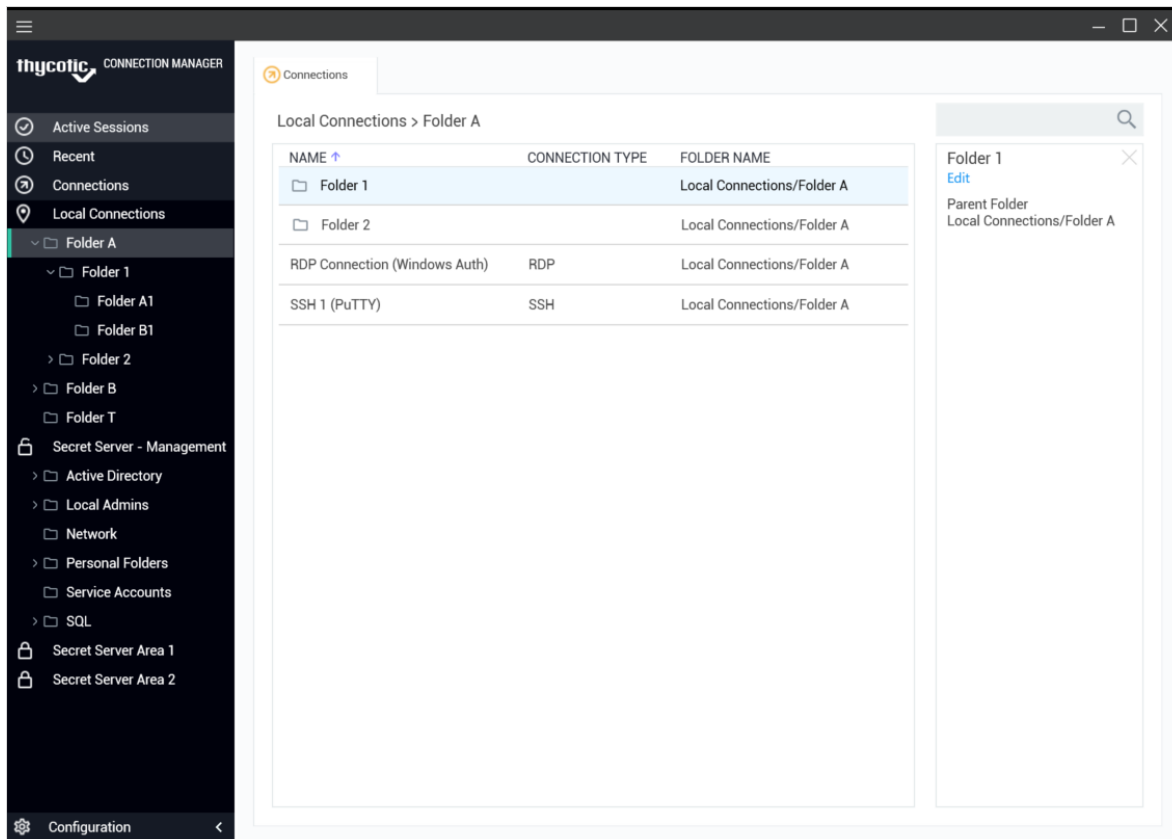
- **Active Sessions:** Select to view all active sessions.
- **Recent Sessions:** Select to view recently active sessions.
- **Connections:** This space displays the folder tree for both Local and Secret Server connections. Navigate using the tree or by drilling down through folders displayed in the action window, on the right.
- **Configuration:** Clicking in this area brings up a sub-menu with configuration options such as connected Secret Server(s) and default connection parameters.



## Work Area

Except for the first tab, the work area consists mostly of tabs representing open connections. The first tab corresponds to one of the selected options in the navigation tree which includes Active Sessions, Recent Connections, or a folder-view of Local Connections/connected Secret Server. For the later, you may navigate through folders directly inside the Connection tab.





## Properties Area

All Local connections, Secret Server connections, and folders have a Properties section. This section allows a user to view some of the details of the connection and folder, and allows users to perform functions on the selected object, such as launching a connection, editing properties, or viewing passwords.

The image shows three side-by-side panels from a web application. Each panel has a title bar with a close button (X).

- Left Panel:** Title "Steve's Servers", subtitle "Edit". It shows a "Parent Folder" set to "Local Connections".
- Middle Panel:** Title "Win Server #1", subtitle "Edit". It contains fields for "Computer Name" (value: name), "User Name" (value: Administrator), and "Password" (masked with dots, with a "Show" link). Below these is a "Launcher" section with an RDP icon and label.
- Right Panel:** Title "You will require comment". It contains fields for "Domain" (value: Yes) and "Username" (value: You). Below these is a "Launcher" section with an RDP icon and label.

**Note:** The Properties section for a Secret Server Secret will never display, or have an option to display, the password for that Secret.

## Menus

There are several menu types available in the user interface: an overall menu available from the hamburger control at the top left of the application, and context sensitive right-click menus available throughout the interface.

### Stack Menu

The  menu at the top left of the application allows you to:

- Create new connections (RDP or SSH)
- Create new folders
- Delete folders
- Delete connections
- Exit the application

### Right-Click Navigation Menu

Right clicking a folder allows you to:

- Create new connections
- Create new folders
- Delete folders
- Import connections

- Export connections

## Work Area Menu

Right clicking the work area allows you to:

- Create new connections (RDP or SSH)
- Create new folders

## Search

Each folder contains a search box in the upper right-hand corner. The contents of the *current* folder are filtered based on the value entered into the search box.

# Administration Procedures

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## Configuration

Located at the bottom left of the application screen, the Configuration button allows a user to set up and control various aspects of the application.

## Connecting to Secret Server

**Note:** Connection Manager will only connect to Secret Server version 10.7 or later and requires a valid Secret Server license.

1. From the Configuration menu, select **Secret Server Connections**.
2. Select **Add a Connection**. Step 1 of the Secret Server connection wizard appears:

Connect to Secret Server  
Step 1 of 2: Please enter your credentials

Secret Server Name\*

Secret Server URL\*

Username\*

Password\*

Domain

Two Factor: Select two factor authentication that applies:

☒ None

☐ Pin Code

☐ Duo Push

☐ Duo Phone Call

Remember me: ☐ Store credentials locally

Cancel Connect

3. Complete the required\* fields, including:

- **Secret Server Name:** A friendly name for the connection.
- **Secret Server URL:** The URL for the Secret Server instance, usually `https://<Server Name>/SecretServer`.
- **Username:** The username for the Secret Server instance to which you want to login. (This is not the “username\@company.com” format.)
- **Password:** The password for the account.
- **Domain:** The Secret Server environment. If this environment has been given a specific Domain value for login, enter the same value here.
- **Two Factor:** Select the appropriate two-factor authentication option for your environment.
- **Remember me:** Select this check box if you want Connection Manager to remember the credentials you entered. This option stores the credentials in local storage and encrypts them using your application password.

**Note:** Even if selecting this option, the user will still need to authenticate back to Secret Server when the application launches or times out.

4. After the required fields have been entered click **Connect**. Step 2 of the wizard appears:

**Edit a Secret Server**  
Step 2 of 2: Select secret server templates to use in this application

Search for Template Name

<input checked="" type="checkbox"/>	Active Directory Account
<input type="checkbox"/>	AD Different
<input type="checkbox"/>	Amazon IAM Console Password
<input type="checkbox"/>	Amazon IAM Key
<input type="checkbox"/>	Bank Account
<input checked="" type="checkbox"/>	Cisco Account (SSH)
<input type="checkbox"/>	Cisco Account (Telnet)
<input type="checkbox"/>	Cisco Enable Secret (SSH)
<input type="checkbox"/>	Cisco Enable Secret (Telnet)
<input type="checkbox"/>	Cisco VPN Connection
<input type="checkbox"/>	Combination Lock
<input type="checkbox"/>	Contact
<input type="checkbox"/>	Credit Card
<input type="checkbox"/>	Generic Discovery Credentials

Back Cancel Finish

5. In Step 2, the system automatically fetches a list of Secret templates from the Secret Server URL entered in Step 1. The most common templates for RDP and SSH sessions are selected for you by default. You may select and deselect additional templates as desired. You may also search for a specific template by name.

6. Click **Finish** once all desired templates have been selected. The connection is added and appears in the navigation menu with a “Lock” icon to the left.

**Note:** Secret Server connections will persist between session of Connection Manager; however, users have to re-authenticate the connection after the application is launched or if the session times out.

## Modifying a Connection

Existing connections to Secret Server can be modified. Most fields can be modified except for the **Secret Server URL** field:

1. From the **Configuration** menu, select **Secret Server Connections**. The **Secret Server Connections** window opens.
2. Click **Edit** text next to the Secret Server connection to be modified. The Edit text is between the Connection name and the URL value. The connection dialog box opens:

Connections			
Local Connections > 2			
NAME ↑	CONNECTION TYPE	FOLDER NAME	
1		Local Connections/2	
2		Local Connections/2	
AWS-RDP	RDP	Local Connections/2	AWS-RDP <a href="#">Edit</a>
AWS-RDP#2	RDP	Local Connections/2	Computer Name
Remote SSH	SSH	Local Connections/2	User Name administrator
Surface Local - Admin	RDP	Local Connections/2	Password
Surface Local -	RDP	Local Connections/2	
Surface Remote - Admin	RDP	Local Connections/2	
			Launcher RDP

**Note:** Users can make modifications to any of the fields here except for the Secret Server URL. If the Remember me option was selected previously, the user will not be able to change the Username value either.

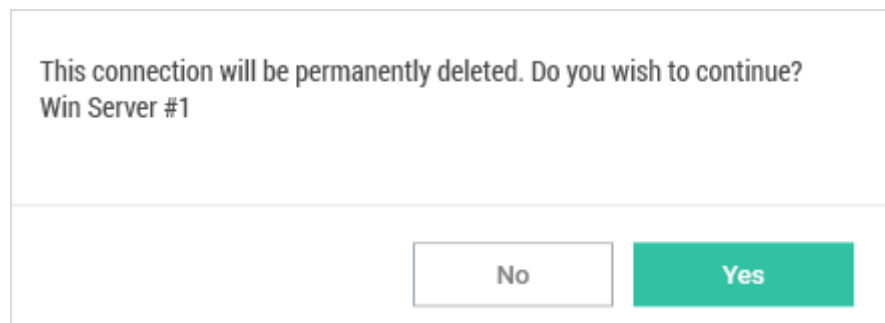
3. Make any desired changes in Step 1 and click **Connect**.
4. Make any desired changes in Step 2 and click **Finish**.

**Note:** A user may modify template selections at any time by selecting **Edit** next to the Secret Server connection.

## Deleting a Connection

To remove a connection:

1. From the **Configuration** menu, select **Secret Server Connections**. The **Secret Server Connections** window opens.
2. Click the **Remove** text to the far right of the Secret Server connection to be removed. A warning appears:



3. Click **Yes** when finished.

## Importing and Exporting Connections

### Exporting Connections

Export allows users to export all local connections. When a folder is selected, the contents of that folder, along with any subfolders (and their contents), is included in the export file.

To initiate an **export**, perform the following:

1. From the Navigation menu, click the **desired folder or connection** under the Local connection section. Alternatively, the Local connection or folder may be selected in the main window as well.
2. Right-click and select **Export**. The **Select file to export** window opens.

Select file to export

Export File Name:  [Browse](#)

Export Password(s): ☐

[Cancel](#) [Export](#)

3. Click **Browse** and enter **the location and file name** for export.

**Note:** If Export Password(s) is selected, passwords for the connections is exported in **clear text**.

4. Click **Export** to complete the action.

The Import option is only available for Local connections and can only be accessed from the Navigation tree.

## Importing Connections

To initiate an import, perform the following:

1. From the Connection manager navigation tree, select **the Local Connection folder** to which the contents should be imported.
2. Right-click and select **Import**. A file browser window opens.
3. Navigate to the location of the JSON file containing the content for import.
4. Select it and click **Open**. The Connections are imported.

## File Format

The contents of any Export or Import file is in JSON format. The following is an example of the formatting:

```
{
  "SchemaVersion": "1.0",
  "Folders": [
    {
      "Id": "abcde123-456f-7890-12g3-456h78ij9kl0",
      "Name": "Folder1"
    },
    {
      "Id": "bgh9fkf5-771s-6218-6v8-z2ph441w0rr2",
      "ParentFolderId": " abcde123-456f-7890-12g3-456h78ij9kl0",
      "Name": "SubFolderA"
    },
  ],
  "Secrets": [
    {
      "Name": "Connection1",
      "Type": "Rdp",
      "ParentFolderId": " bgh9fkf5-771s-6218-6v8-z2ph441w0rr2",
      "ComputerName": "MachineName",
      "Port": "3389",
      "UserName": "UserA",
      "Password": "PasswordInClearText"
    },
  ],
}
```

**Note:** The red text for the password field indicates that this part of the JSON file will only be included if the Export Password(s) option is used.

## Configuring Global Settings

Global Settings allows a user to control default parameter values when creating Local connections. To access:

1. From the Configuration menu, click **Global Settings**. The Global Configuration appears:



## Global Configurations

RDP Global Settings

SSH Global Settings

Desktop Size

Auto

Auto Expand

☒

Color Depth

True Color (24 bit)

Local Devices

Select resources to use in remote session:

☐

Printer

☐

Drives

☒

Clipboard

Audio

Select resources to use in remote session:

☒

This Computer

☐

Remote Computer

☐

Do Not Play

Cancel

Save

2. The available options are accessible via tab controls and include RDP Global Settings and SSH Global Settings:

- These default options may be overridden within the individual connections.
- Connections from Secret Server do not support all available parameters. In such cases the default parameters will be substituted.
- Any of the default configuration values that are specified in a Secret, from a Secret Server connection, will use the values from the Secret instead of the Global Configurations.

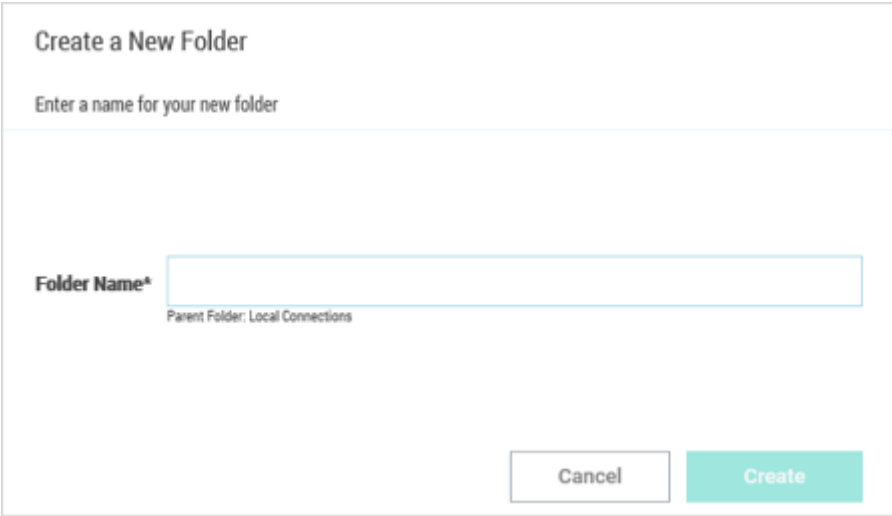
## Common User Activities

Since there are many variations and configuration options for remote connectivity, it is not possible to cover all of them in detail. However, Connection Manager does support many of these variations. Feel free to explore further and if you have additional questions please [contact](#) us.

### Creating a New Folder

Connection Manager uses folders to help organize your local connections.

1. Navigate to the **location where a new folder should be created**.
2. Right-click and select **New Folder**.

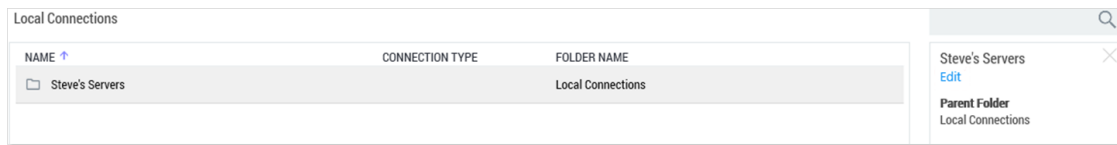


The dialog box is titled "Create a New Folder". It contains a text input field with the placeholder text "Enter a name for your new folder". Below the input field, the label "Folder Name\*" is followed by a small text indicating the parent folder: "Parent Folder: Local Connections". At the bottom right, there are two buttons: "Cancel" and "Create".

3. Enter the **Folder Name** and click **Create**.

## Editing a Folder

1. Navigate to the **folder to be edited** and select it in the main window:



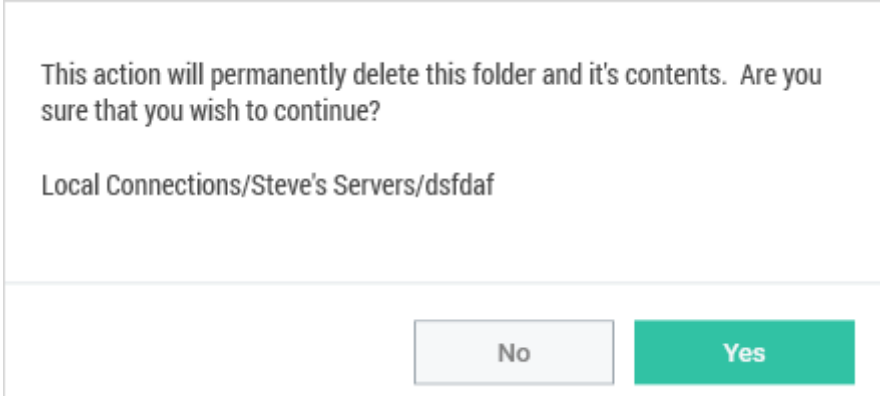
2. From the Folder properties area, click the **Edit** link.
3. From the Edit options, make any desired change to the folder, and click **Save**.

## Removing a Folder

When a folder is removed, the folder, and its contents (Local connections and other folders) are deleted.

**Important:** This action is **not** reversible. Once a connection is deleted it cannot be recovered.

1. Navigate to **the folder to be deleted**.
2. Right-click the **folder name** and select **Delete**. A confirmation window opens.



The dialog box contains the text: "This action will permanently delete this folder and it's contents. Are you sure that you wish to continue?". Below this text, the path "Local Connections/Steve's Servers/dsfdaf" is displayed. At the bottom, there are two buttons: "No" and "Yes".

3. Select **Yes** to continue.

## Creating a New Connection to Remote Systems

Connection Manager allows users to create new connections to remote systems and store them locally. Secret Server Secrets may only be viewed and initiated within Connection Manager.

All required fields and the appropriate optional fields must be filled out. If you choose not to enter a username and password, you will be prompted to enter this information when connecting. Many of the fields will have default values pre-entered. You may keep these values or modify them as appropriate.

1. From the Local connections section of the navigation tree, navigate to **the folder where the new connection will be created**.
2. Right-click the **folder name** and select **New Connection** followed by the **connection type** (RDP or SSH).
3. Dependent upon the connection type (RDP or SSH), a dialogue box will open. The options will vary based on the type of connection selected.

RDP connection:

### Edit a Remote Desktop Connection

General Windows Mode Local Resources

Connection Name\*

Connection 1

Computer Name\*

<MachineIP OR MachineName>

Enter a computer name or IP address

Port\*

3389

User Name

UserA

Password

••••••••

Cancel

Save

SSL connection:

## Edit a Secure Shell (SSH) Connection

[General](#)
[Advanced](#)
[Private Key File](#)
[Tunnels](#)

Connection Name\*

SSH Connection 1

Computer Name\*

<MachineIP OR MachineName>

Enter a computer name or IP address

Port\*

22

User Name

User B

Password

••••••••

Cancel

Save

**Note:** The defaults value setting may be modified under the Configuration option.

- Once all appropriate information is added, click **Create** to add the connection.

## Editing Connections to Remote Systems

- Navigate to the **connection to be edited** and click the **connection name**.

Connections

Local Connections > 2

NAME ↑	CONNECTION TYPE	FOLDER NAME
1		Local Connections/2
2		Local Connections/2
AWS-RDP	RDP	Local Connections/2
AWS-RDP#2	RDP	Local Connections/2
Remote SSH	SSH	Local Connections/2
Surface Local - Admin	RDP	Local Connections/2
Surface Local -	RDP	Local Connections/2
Surface Remote - Admin	RDP	Local Connections/2

AWS-RDP

Edit

Computer Name

User Name administrator

Password

Launcher

RDP

- From the Connection properties area, click the **Edit button** under connection name. An Edit dialog will open depending on the connection type.
- Modify the fields as desired. (Most values in a local connection may be edited, except the required fields and the username field.)

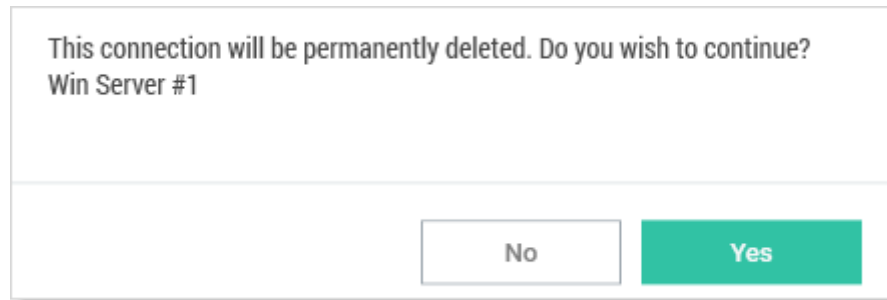
4. Click **Save** when finished.

## Removing Connections from Remote Systems

A Local connection may be deleted from Connection manager.

**Important:** This action is **not** reversible. Once a connection is deleted it cannot be recovered.

1. Navigate to the **connection to be removed**.
2. Right-click the connection and select **Delete** from the menu. A confirmation dialog box will open.



3. Click **Yes** to confirm.

## Connecting to Secret Server

When the application starts, any configured Secret Server connection will be displayed but *not* connected.

To re-authenticate the Secret Server connection, double-click **the closed-lock icon** in the navigation tree, or right-click and select **Connect**.

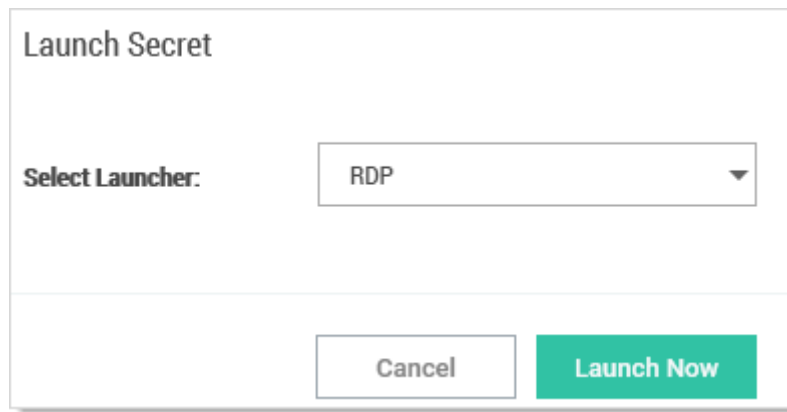
## Opening a Remote Connection

The process of connecting to a Local connection or to a Secret from Secret Server is essentially the same.

1. Navigate to the **remote connection**. The remote session can be opened two ways:
  - From the main window, double-click the **connection name**. A new connection tab will open.
  - Select **the connection** to open the Properties tab. In the bottom half of the Properties window there is a section that lists available Launchers for use. Click the **desired launcher** and the session will open.

Sessions launched from a Secret Server Secret may have workflows associated with the launching or closing of a session. If the connection requires no special workflow, the remote connection will be established as a new tab in the work area. If user entry is required for a workflow action, a window(s) will open prior to connecting so users can enter the appropriate or required data.

2. Select a launcher. For Secrets where multiple launchers are available, you are prompted to select one.

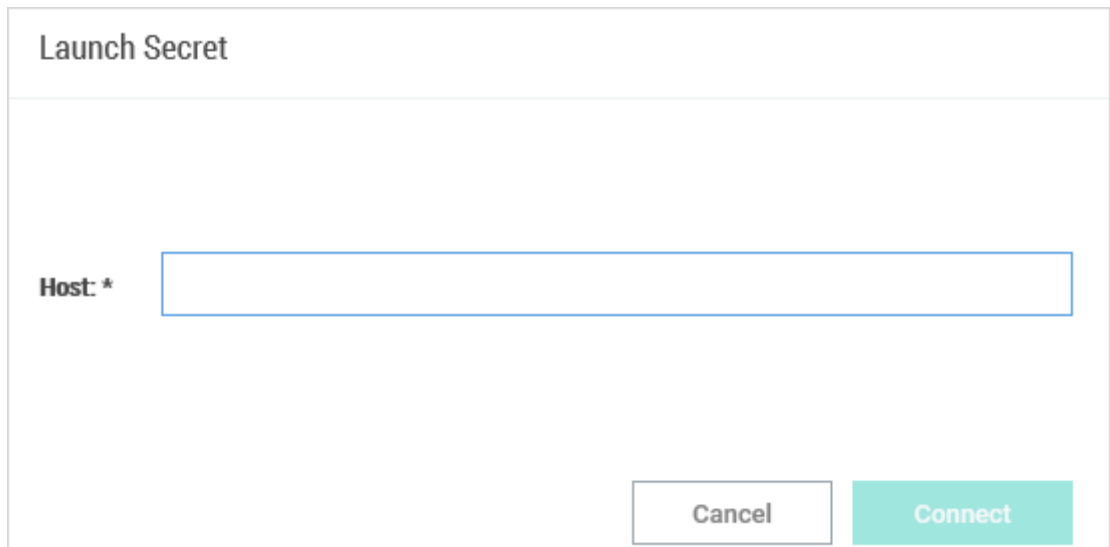


Launch Secret

Select Launcher: RDP ▼

Cancel Launch Now

3. Select a Host or Machine ID. For Secrets where a host is not specified, you are prompted to enter one.

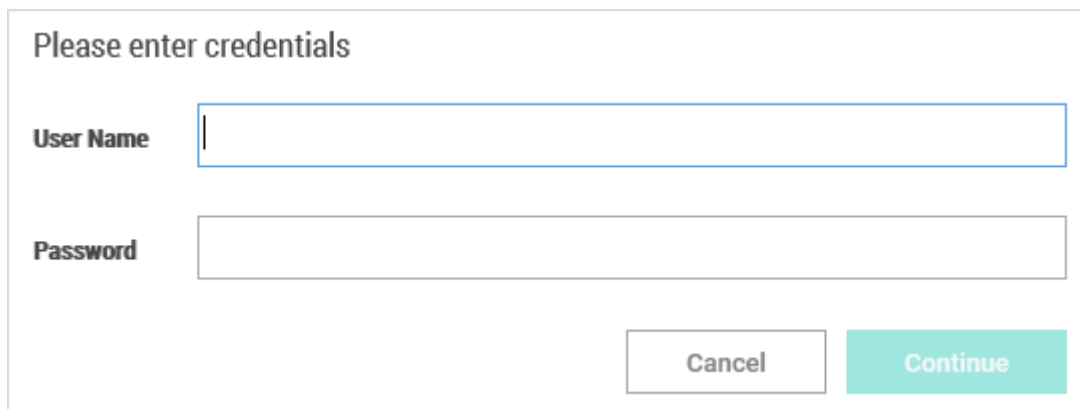


Launch Secret

Host: \*

Cancel Connect

4. Enter user credentials. For Connections or Secrets without an embedded username or password (or password), a dialog box opens (based on launcher type) to enter credentials.



Please enter credentials

User Name

Password

Cancel Continue

5. Secrets with workflows. Connection Manager supports a variety of Secret Server workflows associated with remote connections such as:

- Require Comment
- Check-in or Check-out
- Change Password on Check-in
- Prompt for Reason or Ticket System
- Request Access
- Double Lock

The workflow functionality is very similar to Secret Server. As a user you will see a notification in the properties area of the secret. Please see [Related Resources](#) for the Secret Server Multi-Tier Secret Access Workflow.

Depending on the type of workflow initiated, Connection Manager may prompt you with appropriate dialogue such as this for Approvals.

Once the workflow is successful the connection is established.

## Related Resources

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- [Secret Server Multi-Tier Secret Access Workflow](#)
- [Supported Characters for Machine Host Name](#)

## Need Help?

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[Open a support case.](#)