



# **Passwordstate Security Administrators Manual**

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# 1 Introduction



Welcome to the Passwordstate Security Administrators Manual.

This manual will provide instructions for Security Administrators of Passwordstate to configure user accounts, system wide settings, and various other features which managing the environment.

The following table describes each of the different sections available within the Administration area of Passwordstate.

<a href="#">Active Directory Domains</a>	Specify which Active Directory Domains can be queried from within Passwordstate, either for User Accounts or Security Groups
<a href="#">Auditing</a>	Provides the ability to query all auditing data within the system, with multiple filtering options, and the ability to export data as well if required
<a href="#">Auditing Graphs</a>	Simply a graphical representation of all the auditing data, with similar filtering features
<a href="#">Authorized Web Servers</a>	Authorized Web Servers is used to specify which web server host names are authorized to run the Passwordstate web site - used as a mechanism to prevent theft of the database an hosting in a different environment
<a href="#">Backups and Upgrades</a>	Allows you to specify settings and a schedule for perform backups of all web files and the database, and also a place to perform In-Place Upgrades of Passwordstate
<a href="#">Bad Passwords</a>	A list of password values which are deemed to be 'bad' and can educate your users not to use these values
<a href="#">Browser Extension Settings</a>	Allows you to specify various settings for how the Browser Extension feature is used
<a href="#">Email Notification Groups</a>	Can be used to manage email notification settings for a group of individual users accounts, or members of security groups
<a href="#">Email Templates</a>	Allows you to customize the emails sent from Passwordstate, or to enable/disable notifications
<a href="#">Emergency Access</a>	A separate 'Security Administrator' role login which can be used in the event other accounts are locked out, or inaccessible for any reason
<a href="#">Encryption Keys</a>	This menu allows you to export your encryption keys to a password protected zip file, and also to perform key rotation of your encryption keys
<a href="#">Error Console</a>	Any errors experienced within Passwordstate will be logged on this screen, which can be reported to Click Studios for troubleshooting purposes

<a href="#">Export All Passwords</a>	Allows you to export all Password records from the system to a CSV file
<a href="#">Host Types &amp; Operating Systems</a>	Allows you to add additional Host Type and Operating System records which can be associated with Host records in Passwordstate
<a href="#">Images and Account Types</a>	Custom Images are used in two locations in Passwordstate - icons for the Password List themselves, and also for the 'Account Type' field for Password records
<a href="#">License Information</a>	Allows you to enter your license keys for Passwordstate - either Client Access Licenses, Annual Support or High Availability
<a href="#">Menu Access</a>	Allows you to control which users are able to access each of the main navigation menus. Menus can be disabled, or hidden from users if required
<a href="#">Password Folders</a>	Shows all Password Folders created in Passwordstate
<a href="#">Password Generator Policies</a>	Create, edit or delete Password Generator Policies. Policies can be associated with one or more Password Lists, and are used as a basis for generating random passwords - of varying complexity
<a href="#">Password Lists</a>	Shows all the Shared Password Lists in Passwordstate, and provides various features for administering permissions, moving passwords around, or importing passwords in bulk
<a href="#">Password List Templates</a>	Shows all the Password List Templates stored in Passwordstate, which can be used to apply a common set of settings to one or more Password Lists
<a href="#">Password Resets</a>	Some of the features under the main Menu 'Resets' are permission based. If, for whatever reason, users aren't able to administer the settings and records under this menu because they don't have access, you can make changes or grant access via this page.
<a href="#">Password Strength Policies</a>	Password Strength Policies are used as a set of rules for determining the strength of a Password. Once a policy is created, it can be applied to one or more Password Lists
<a href="#">Privileged Account Credentials</a>	Various features in Passwordstate require Active Directory Accounts to perform certain tasks i.e. Resetting Passwords, querying active directory, etc. This screen allows you to add those accounts to be used
<a href="#">Reporting</a>	Various reports which can be exported to CSV files
<a href="#">Security Administrators</a>	Allows you to specify which users are 'Security Administrators' within Passwordstate, and select which roles they can have.
<a href="#">Security Groups</a>	Allows you to manage either local security groups created within Passwordstate, or Active Directory security groups. These groups can then be used for applying permissions to Password Lists, or to give/deny access to various features
<a href="#">System Settings</a>	System Settings is used to manage the majority of system wide settings for Passwordstate
<a href="#">User Accounts</a>	Allows you to specify the user accounts which are able to access the Passwordstate web site
<a href="#">User Account Policies</a>	User Account Policies are used to apply a specify set of settings, to any number of user accounts or security group members

## 2 Active Directory Domains

The Active Directory Domains screen is where you can specify which domain's user accounts and security groups can authenticate and interact with the Passwordstate website. A few things to note about AD Domains:

- If you are using the AD Integrated Authentication version of Passwordstate, and you want users in multiple domains to authenticate and access the Passwordstate web site, you must have a domain trust in place. This is because it's Internet Information Services which does the initial authentication check on the domains
- You must specify a domain account which has Read access to the domain, and this account can be setup on the [Privileged Account Credentials](#) screen
- Even if you are using the form-based authentication version of Passwordstate, you can add in Active Directory domains here, so that Password Resets on each of the domains can work - this can even be done with non-trusted Active Directory Domains

 **Note:** If you are unsure of what NetBIOS Name and LDAP Query String settings to specify, please speak with your Active Directory Administrators for assistance.

### Active Directory Domains

To grant access to Passwordstate by either adding users manually, or via Active Directory lookup, you need to specify one or more Active Directory Domains.

If you are unsure of what your Active Directory settings should be, please use the following as a guide:

- Open a command prompt on your computer and type **set userdomain**, and then **set userdnsdomain**
- The NetBIOS Name for your Active Directory settings should match the result of **set userdomain**
- FQDN should match the result of **set userdnsdomain**
- The LDAP Query String for your Active Directory settings should match the result of **set userdnsdomain** in the following way:  
LDAP Query String should read `dc=clickstudios,dc=com,dc=au` for the domain `clickstudios.com.au`

Actions	NetBIOS Name	FQDN	LDAP Query String	Privileged Account - Read	Default Domain
	dev	dev.cstudios.com.au	dc=dev,dc=cstudios,dc=com,dc=au	halox\msand	✘
	halox	halox.net	dc=halox,dc=net	halox\msand	✔
	sanddomain	sanddomain.com	dc=sanddomain,dc=com	msand@sanddomain.com	✘

Add | Grid Layout Actions...

## 3 Auditing

The Auditing screen allows you do report/filter on all auditing data within Passwordstate. Filtering can be done by:

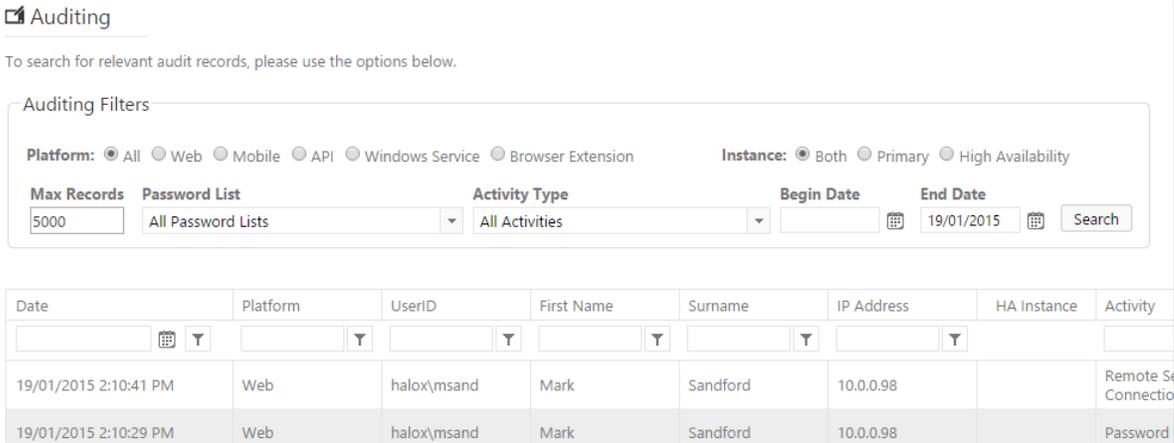
- Platform - events generated through the web site, the Mobile Client, the API, Windows Service or Browser Extension
- Password List - filter on events specific to a selected Password List

- Activity Type - not all audit events relate to passwords i.e. there's audit events for sending emails, failed authentication attempts, etc. To see a complete list of 'Activity Types' ensure the 'Password List' drop-down list has 'All Password Lists' selected
- Beginning and end date - by default, date filtering is not enabled

In addition to reporting on auditing data on the screen, you can export the data for further analysis to a CSV file if required.

 Note 1: You can disable the feature allowing purging of auditing data on the screen [System Settings](#) -> [Miscellaneous Tab](#)

 Note 2: The Telerik Grid and Filter controls here prevent filtering while using special characters - for security reasons. If you're wanting to filter using a backslash (\) here, simply type the backslash twice i.e. domain\\userid



**Auditing**

To search for relevant audit records, please use the options below.

**Auditing Filters**

**Platform:**  All  Web  Mobile  API  Windows Service  Browser Extension **Instance:**  Both  Primary  High Availability

**Max Records:**  **Password List:**  **Activity Type:**  **Begin Date:**  **End Date:**

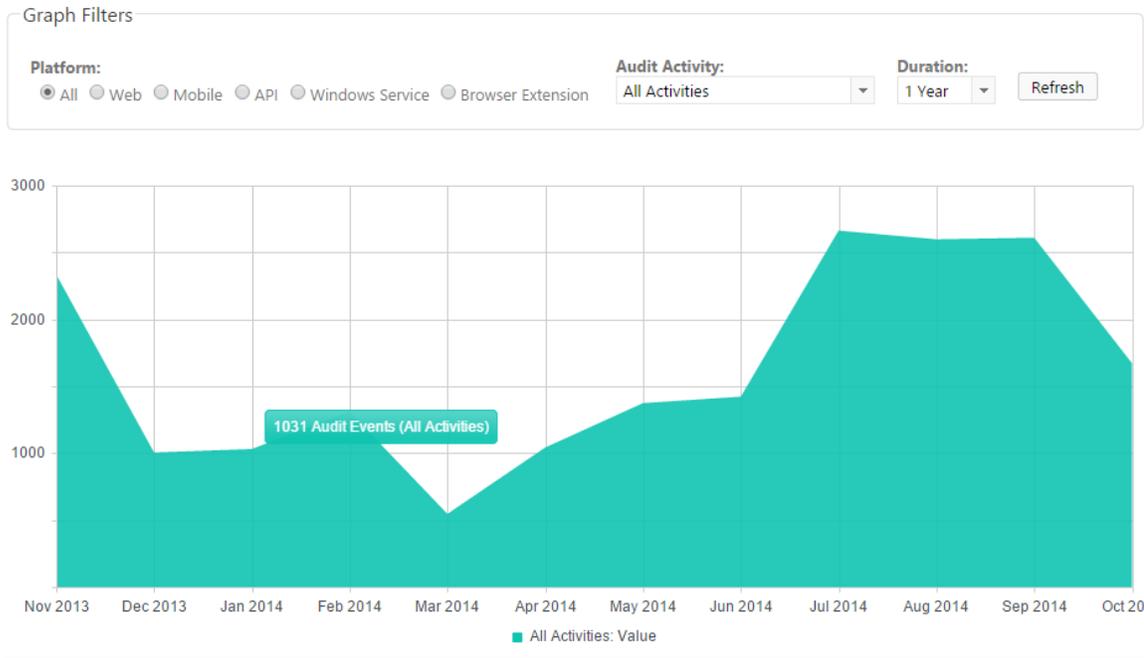
Date	Platform	UserID	First Name	Surname	IP Address	HA Instance	Activity
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
19/01/2015 2:10:41 PM	Web	halox\msand	Mark	Sandford	10.0.0.98		Remote Se Connectio
19/01/2015 2:10:29 PM	Web	halox\msand	Mark	Sandford	10.0.0.98		Password

## 4 Auditing Graphs

The Auditing Graphs screen is simply a graphical representation of the auditing data, with similar filtering options. Instead of filtering between dates, you just select a specified period i.e. 1 year, 2 years, etc.

### Auditing Graphs

Please select the appropriate filters below, and then click on the 'Refresh' button.



## 5 Authorized Web Servers

The Authorized Web Servers screen is where you can specify the host names of the web servers which are authorized to host the Passwordstate web site.

The intention of this feature is to prevent the theft of a copy of the database, and hosting it and the web site in an untrusted environment.

**Note 1:** If you plan on moving your Passwordstate web installation to a new web server, you must first register the host name of the new web server on this screen

**Note 2:** If you also purchased the High Availability module, you must register the host name of your High Availability instance web server

**Note 3:** The host names are not case sensitive

## 6 Backups and Upgrades

The Backups and Upgrades screen allows you to specify the settings required to perform backups in Passwordstate, as well execute manual backups and view the status of any backups.

**Note 1:** The 'Upgrade Now' button takes you to the same screen you would navigate to when clicking on the new build notification hyperlink which 'may' appear at the top of the screen when

new builds are available

The following instructions will provide some guidance for configuring the backup settings, and other permissions required to backup all the web tier and database files:

## Backup Settings

---

On the Backup Settings screen, you have the following options available to you:

- Whether you want to perform a backup prior to any In-Place Upgrades - this option should only ever be unchecked if you have your own Backup procedures in place
- How many backups to keep on the file system
- The path to where you would like to store the backups - please use UNC naming conventions here, not a literal path such as c:\backups
- Username and Password required for the backup (below in this document is an explanation of the permissions required)
- Whether you want to enable a regular set-and-forget schedule for the backups to occur
- You can also exclude the database from automatic backups as well, and this is useful if you use a third-party tool to perform SQL Backups which prevents you from executing standard backups
- And finally, what time you would like the scheduled backups to begin, and how often you want a backup to occur

## Backup and Upgrade Settings

Detailed below are the settings required to allow Passwordstate to backup its own folder, a copy of the database if required, and to perform In-Place Upgrades.

backup settings

**Instructions**

 Please note the backup account you specify below must have:

1. Write Access to the Backup Path
2. Write Access to the Passwordstate folder
3. Permissions to stop and start the Passwordstate Windows Service
4. And the SQL Server Windows Service must be configured with an account which also has Write Access to this Backup Path.

(Refer to the 'Backups and Upgrades' section in the Security Administrator's Manual (Help menu) for full details of configuration requirements)

**Backups and In-Place Upgrades Account**

Specify a domain account below which will be used for either performing backups of Passwordstate, or for performing In-Place Upgrades - or both.

Backup UserName :

\* Please specify username in the format of domain>\<username>

Backup Password :   

**Backups Settings**

Specify settings as appropriate below for scheduled backups, or backups prior to performing an In-Place Upgrade.

Enabled Scheduled Backup :

Backups To Keep :

Backup Start Time :  Hour  Minute

Backup Every :

Backup Path :

\* To backup to a network location, specify the path in the format of \\<servername>\<sharename>

Exclude Backup of Database :  You would generally only exclude database backups if you have an established backup process.

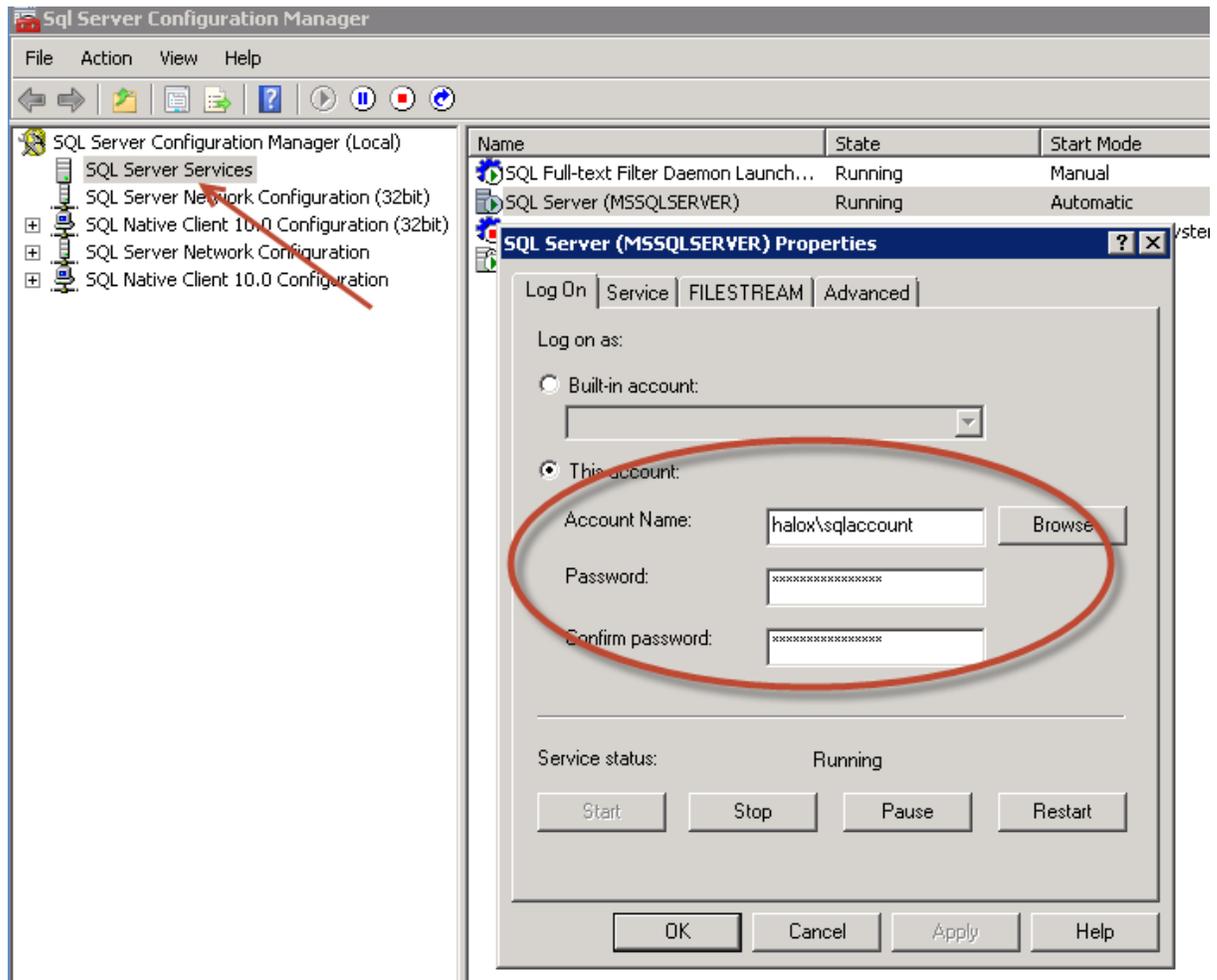
In-Place Upgrade Backups :  Perform backup prior to an any In-Place Upgrades.

## Backup Permissions

To allow backups to work through the Passwordstate web interface, you will need to specify an account (domain or Windows account), which has the following permissions:

- Permissions to write to the Backup path you've specified
- Permissions to stop and start the Passwordstate Windows Service on the web server
- Permissions to write to the Passwordstate folder on your web server.

In addition to this, you must configure the SQL Server service to use a domain or Windows account which has permissions to also write to the Backup Path. To do this, you need to open the 'SQL Server Configuration Manager' utility on your database server, click on 'SQL Server Services', and the specify and account as per the next screenshot:



 Note: Please ensure you test the upgrade by clicking on the 'Test Permissions' button - this will report any issues with permissions in performing a backup.

## Automatic Backup Troubleshooting

As every customer's environment can sometimes be slightly different, it's possible you may experience a issues when initially setting up the automatic backups. If this is the case, below is a case scenario of settings which have helped several customers in the past:

- For the backup username we created a domain account called **testcopy**. This account only has Domain User rights, and nothing else
- Backup Share/Folder are located on a Windows Server 2012 server, and the web server is running on a different server altogether
- The Passwordstate Application Pool identity is running as NetworkService (also ensure there are modify NTFS permissions applied to the Passwordstate folder for this account)

- The Share permissions itself is set to full control for 'testcopy' account
- The testcopy account you has modify NTFS permissions to the backup folder
- The testcopy account is set as local administrator on the web server so it can stop/start the Passwordstate Windows Service
- The testcopy account is used for the 'Log On As' identity for the SQL Server service – needed for the SQL Backups (our Security Admin manual shows you how to configure this)
- Testing of permission worked when authenticated to Passwordstate with a domain account which only has Domain User rights on the domain

The following has also helped a few customers as well, who had to assign additional rights on the web server for their equivalent of the testcopy account above – a group policy setting was restricting which domain accounts could use the following setting. The following was required:

- Open a command prompt as Admin
- Type in secpol.msc /s
- Select "Local Policies" in MSC snap in
- Select "User Rights Assignment"
- Right click on "Log on as batch job" and select Properties
- Click "Add User or Group", and include the relevant user account

Something else to check is whether the local 'Administrators Group' had been granted the "Deny Logon as a batch job" right, as this will cause the setting above to have no effect.

## Non Local Administrator Rights for the Backup Account on the Web Server

---

If you do not wish to grant the backup account Local Administrator rights on your web server, then the following instructions will help with this.

- The backup account will now need Modify NTFS permissions to the Passwordstate Folder, and all nested files/folders
- Download SubInACL from here and install somewhere - <https://www.microsoft.com/en-us/download/confirmation.aspx?id=23510>. It really only installs the subinacl.exe file only into the location of C:\Program Files (x86)\Windows Resource Kits\Tools. If you didn't install this on your web server, copy the file across to a folder on your web server
- Open a command prompt as Admin, change to the folder where you have subinacl.exe, and execute the following command (replacing <BackupAccount> with the correct account:

```
subinacl /service "Passwordstate Service" /grant=<BackupAccount>=F
```

- While still having the command prompt open as Admin, type in secpol.msc /s
- Select "Local Policies" in MSC snap in
- Select "User Rights Assignment"
- Right click on "Log on as batch job" and select Properties
- Click "Add User or Group", and include the relevant user account

## 7 Bad Passwords

The Bad Passwords screen allows you to maintain a list of password which are deemed to be bad i.e. common passwords, easy to guess, etc. The intention is to educate your users to ensure they do not use 'Bad' passwords.

On this screen you can add or delete bad password records, and once you have a list you are happy with, there are options on the screen Administration -> [System Settings](#) -> [Miscellaneous Tab](#), and [Password Options Tab](#) for notifying your users when bad passwords are detected.

If required, you can also import multiple 'Bad Passwords' of your own via the use of a csv file.

## 8 Browser Extension Settings

The Browser Extension Settings area allows you to specify various settings, for all users, for how the Browser Extension feature is used. In Particular:

- Browser Extension Settings - can you specify if you want the Extension to automatically log out of itself when the browser is closed, or if the browser has been idle for a set number of minutes. Also specify behaviour for password records which have not been saved using the Browser Extension
- Ignored URLs - if you don't want users to save login credentials for certain web sites, you can add them as 'Ignored URLs'
- Allowed to Use the Extension - IF you don't want to allow certain users, or members of a security group, to use the Browser Extension feature, then you can specify them on this tab
- Prevent Users From Saving Logins - if you only want certain users to use the Browser Extension to form-fill web site logins, and not allow them to save any new records, you can do so on this tab

**Browser Extension Settings**

Use each of the appropriate Tabs below to indicate various Settings, which URLs are ignored by the Browser Extension, which users are allowed to use t

browser extension settings | ignored urls | allowed to use the extension | prevent users from saving logins

Please specify general settings below for the behaviour of the Browser Extension.

**Automatically log the user out of their Browser Extension when they close the browser:**

Yes  No

**Attempt to form fill web sites with password records which were not created by the Browser Extension:**

Yes  No

**Automatically log the user out of their Browser Extension when the browser has been idle for (x) minutes:**

(Setting to 0 disables this feature)

Save

## 9 Email Notification Groups

The Email Notification Groups screen is used to manage email notification settings for a group of individual users accounts, or members of security groups.

Using Email Notification Groups, you can specify which email notifications certain users receive, or don't receive i.e. you may wish to have certain notifications enabled for Security Administrators, but disabled for 'normal' user accounts in Passwordstate.

**Note 1:** Any system wide [Email Templates](#) which are disabled will cause any settings here to be ignored

**Note 2:** If a user has specified their own Email Notification Settings as part of their Preferences, any permissions you apply here for the user will override their personal settings

**Note 3:** If you have more than one Notification Group created for a user, any disabled email categories will over-ride any enabled ones (be careful applying duplicates for a user)

## ☑ Email Notification Groups

Email Notification Groups can be used to enable or disable real-time email notifications for multiple users at once.

**Note 1:** Any system wide 'Email Templates' which are disabled will cause any settings here to be ignored.

**Note 2:** If a user has specified their own Email Notification Settings as part of their Preferences, any permissions you apply here for the user will override their personal settings.

**Note 3:** If you have more than one Notification Group created for a user, any disabled email categories will over-ride any enabled ones (be careful applying duplicates for a user).

Actions	Notification Group	Description
▼	No Access Requests	No Access Requests

Add | Grid Layout Actions... ▼

Once you have created a Notification Group, you can then assign permissions for who is affected by the settings, and which emails are either enabled or disabled. You do this by clicking on the appropriate menu item in the 'Actions' drop-down menu.

## ☑ Email Notification Groups

Email Notification Groups can be used to enable or disable real-time em

**Note 1:** Any system wide 'Email Templates' which are disabled will cause

**Note 2:** If a user has specified their own Email Notification Settings as p  
here for the user will override their personal settings.

**Note 3:** If you have more than one Notification Group created for a user  
enabled ones (be careful applying duplicates for a user).

Actions	Notification Group	D
⬇	No Access Requests	N

Add

- ☑ View Notifications
- 👤 View Permissions
- ✕ Delete

### ✉ Email Notifications

Please select which Email Notifications you would like set for the notification group '**No Access Requests**' by selecting the appropriate option from the 'Actions' drop-down menus below.

Actions	Category	Description	Enabled
▼	Access Request	Notifies the user if their request to access a Password or Password List has been denied	✘
▼	Access Request Denied	Notifies the user if their request to access a Password or Password List has been denied	✔
▼	Access to Password Changed	Notifies user if their access level to an individual Password record has changed	✔
▼	Access to Password Granted	Notifies user if they have been granted access to an individual Password record	✔
▼	Access to Password List Changed	Notifies user if their access level to a Password List has changed	✔
▼	Access to Password List Granted	Notifies user if they have been granted access to a Password List	✔
▼	Access to Password List Removed	Notifies user if their access to a Password List has been removed	✔
▼	Access to Password List Template Changed	Notifies user if their access level to a Password List Template has changed	✔
▼	Access to Password List Template Granted	Notifies user if they have been granted access to a Password List Template	✔
▼	Access to Password List Template Removed	Notifies user if their access to a Password List Template has been removed	✔

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[Return to Notification Groups](#) | [Enable All Notifications](#) | [Disable All Notifications](#) | [Grid Layout Actions...](#)

## 10 Email Templates

The Email Templates screen allows you to customize the emails sent from Passwordstate, or to enable/disable notifications as required.

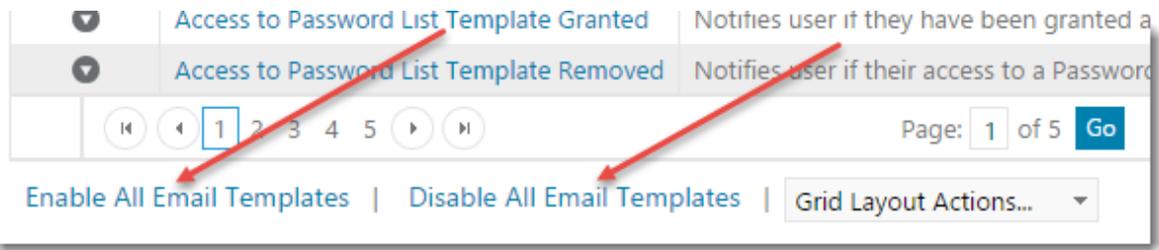
### Enabling/Disabling Email Notifications

You can enable/disable email notifications in one of either two ways:

1. Individually by the appropriate 'Actions' drop-down menu

Actions	Category	Description
▼	Access Request	Notifies the use
▲	Access Request Denied	Notifies the use
↕	Toggle status - Enabled or Disabled	Notifies user if t
↻	Restore Default Template	Notifies user if t
▼	Access to Password List Changed	Notifies user if t

2. Enabling/disabling all email notifications at once by clicking on the the appropriate 'Enable All' or 'Disable All' buttons at the bottom of the grid



## Editing Email Template Content

By clicking on the 'Category' hyperlink in the grid, you can edit the content of the email template - specifying your own words, and formatting options.

At the top right-hand side of the Editor you will notice the 'Variables' tab/ribbon bar. From this drop-down list, you can insert the following variables into your email templates:

- ToFirstName - the First Name of the user who is receiving the email
- ToUserID - the UserID of the user who is receiving the email
- SiteURL - the URL of your Passwordstate web site
- PermissionType - the permission being applied to a Password List or Password record for the user
- PasswordList - the name of the Password List
- Password - the title of the Password record
- Version - the Version number of your Passwordstate install
- UserName - A combination of the Firstname and Username of the user
- ExpiresAt - the date at which a users permissions to a Password List or Password will be removed
- AdditionalBodyText - reserved by Click Studios for various custom text messages
- AuthenticationMethod - which Authentication method was used for authenticated to the Passwordstate web site, or to a Password List

**Note:** In addition to the emails being sent to the relevant intended users, you can also send each email category to a different email address as well, as per the highlighted textbox in the screenshot below. This is useful if you want to send specific email types to a shared mailbox, or SMS alerting service.

## ✉ Edit Email Template

To edit the selected Email Template, please fill in the details below.

**Category :** Password Updated

**Subject : \*** Passwordstate - Password Updated

**Also Send Emails To :**

Emails can also be sent to generic email addresses by specifying them here, separated by semicolons.

Home

Clipboard: Paste, Copy, Cut, Print

Font: Font Name, Real font size, Bold (B), Italic (I), Underline (U), Text Color (A), Font Color (A), Font Family (Aa aA)

Paragraph: Bulleted List, Numbered List, Indent Left, Indent Right, Decrease Indent, Increase Indent, Paragraph Style

Styles: Apply CSS Class, Paragraph Style

Editing: Undo, Redo, Insert Variable

Variables: Insert Variable

Hi [ToFirstName],

The password '[Password]' in password list '[PasswordList]' has been updated by [UserName].

Passwordstate [Version] - Secure Password Management.  
[SiteURL]

Design | HTML | Preview

Test Email | Save | Cancel

If while editing the contents or formatting of an Email Template you decide you don't like the changes you've made, you can restore back to the original content as supplied by Click Studios by selecting 'Restore Default Template' from the appropriate Actions drop-down menu.

Actions	Category	Description
▼	Access Request	Notifies the user if their request is approved
▲	Access Request Denied	Notifies the user if their request is denied
↕	Toggle status - Enabled or Disabled	Notifies user if their access is toggled
↻	Restore Default Template	Notifies user if they have been notified
▼	Access to Password List Changed	Notifies user if their access to the password list has changed
▼	Access to Password List Granted	Notifies user if they have been granted access to the password list

## Testing and Troubleshooting Emails being Sent

When editing a Password List template, there is a button called 'Test Email'. This button will test sending the email template to your own email account. This testing is different however to how emails are normally sent from Passwordstate - normally records are added to the database, and the Passwordstate Windows Service checks and send emails every minute. This 'Test Email' button sends directly from the web site, and does not use the Passwordstate Windows Service.

If emails are queuing up and not being sent as expected, the following suggestions may help to troubleshoot why:

1. Check you have correctly specified your email server's settings on the screen Administration -> [System Settings](#) -> [Email Alerts & Options Tab](#)
2. Ensure the Passwordstate Windows Service is started
3. Check the event log on your web server to see if any errors are being reported as to why emails aren't being sent - look for the Source of 'Passwordstate Service'
4. Check there aren't any Email Templates disabled, either on the screen [Email Templates](#), or [Email Notification Groups](#), or possibly the user has disabled an email notification in their Preferences area

## 11 Emergency Access

The Emergency Access screen allows you to specify a password for a separate 'Security Administrator' role login which can be used in the event other accounts are locked out, or inaccessible for any reason.

A couple of scenarios where this would be applicable is:

- You have issues with authenticating on your domain, and can no longer authenticate to Passwordstate using your normal domain account
- Someone has accidentally deleted or disabled all Security Administrator accounts, and no-one is able to administer all the settings for Passwordstate

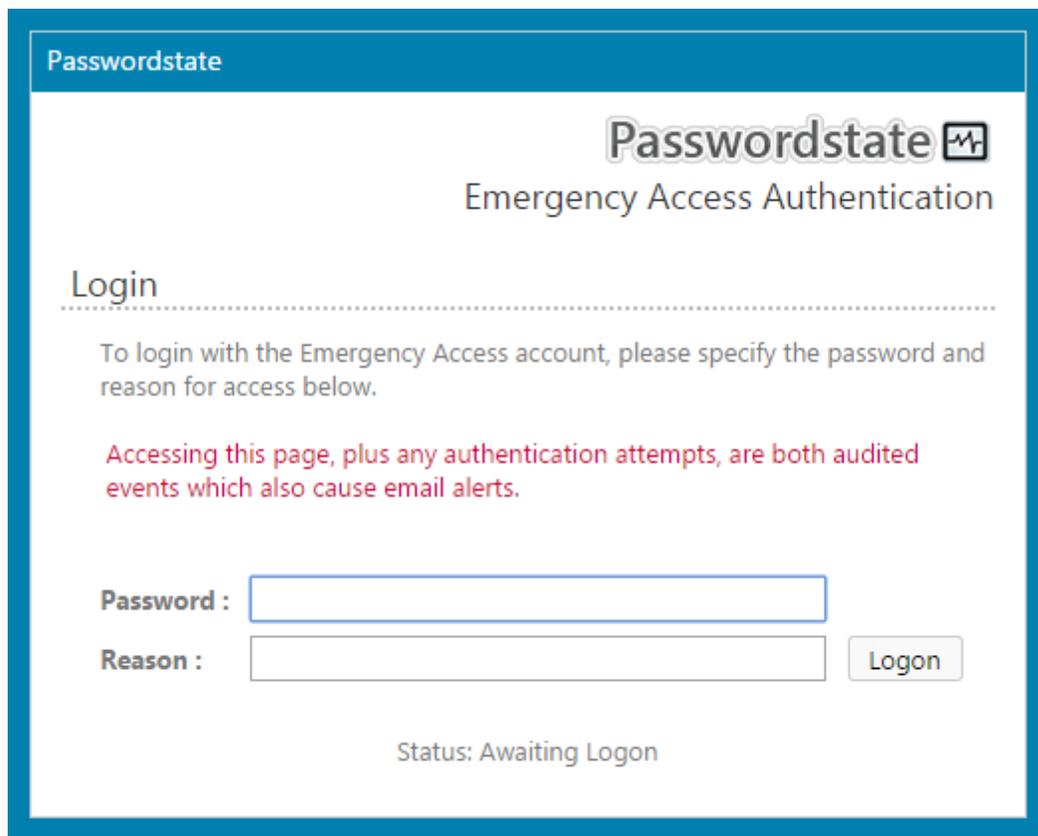
The Emergency Access URL is [HTTPS://<Your Passwordstate URL>/Emergency](https://<Your Passwordstate URL>/Emergency)

 Note 1: Simply browsing to the Emergency Access URL will generate audit records, and notify Security Administrators via email

 Note 2: Navigating to the page Administration -> Emergency Access will also generate audit records, and notify Security Administrators via email

 Note 3: You must specify a reason why you need to access the Emergency Access Login, and this reason is added to the auditing data

 Note 4: Once you've logged in with this account, you will have access to the Administration area of Passwordstate



The screenshot shows a web interface for Passwordstate Emergency Access Authentication. The page has a blue header with the text "Passwordstate". Below the header, the "Passwordstate" logo and "Emergency Access Authentication" are displayed. A "Login" section is separated by a dotted line. The instructions state: "To login with the Emergency Access account, please specify the password and reason for access below." A red warning message reads: "Accessing this page, plus any authentication attempts, are both audited events which also cause email alerts." There are two input fields: "Password :" and "Reason :". A "Logon" button is positioned to the right of the "Reason" field. At the bottom, the status "Status: Awaiting Logon" is shown.

## 12 Encryption Keys

From this screen you can perform the following actions:

### Export Keys

You can export your encryption keys, in the format of split secrets, to a password protected zip file.

**In order to restore your Passwordstate environment after a disaster, the minimum you need is a copy of the web.config file, and a copy of the database** - the encryption keys are split between these two locations. For safe keeping, you can also export your encryption keys and store them away safely.

**Note:** If you were to lose the split secrets in the web.config file, you would not be able to restore your environment in the event of a disaster - it is very important you have a copy of this file, or export the keys using this feature.

### Key Rotation

With this feature, you can update your Encryption Keys used in Passwordstate, and then re-encrypt all your data with these new encryption keys. When performing key rotation, it's very important you follow the on screen instructions so that the re-encryption process is not interfered with in any way.

### 🏠 Encryption Key Rotation

In order to perform encryption key rotation, it is recommended you take the following steps to mitigate against any issues with re-encrypting your data:

- **Ensure you have a backup of your web.config file and database before starting**
- **Once you start the key rotation process, do not navigate away from the screen by clicking elsewhere**
- Place Passwordstate in Maintenance Mode, and ensure there are no other users currently using Passwordstate
- Ensure the AppSettings section in your web.config file is not encrypted (**currently it is not encrypted**)
- Stop the Passwordstate Windows Service
- Perform the Key Rotation by clicking on the button below
- Once the key rotation is complete, restart the Passwordstate Windows Service
- Export your new encryption keys again for safe offline storage
- Re-encrypt the AppSettings section in your web.config file if required
- And perform another backup of your database

### 🔄 Encryption Key Rotation

To begin the process of re-encrypting all relevant data, please click on the **'Re-Encrypt Data'** button at the bottom of the page.

Table Name	Record Count	Status
BackupSettings	1 record to process	🔄
DiscoveryJobs	8 records to process	🔄
DiscoveryJobsACL	15 records to process	🔄
DiscoveryScripts	2 records to process	🔄
HandshakeRequests	0 records to process	🔄
HostsACL	109 records to process	🔄
PasswordHistory	5492 records to process	🔄
PasswordLists	73 records to process	🔄
PasswordListsACL	230 records to process	🔄
PasswordListTemplates	15 records to process	🔄
Passwords	4448 records to process	🔄
PasswordsACL	5 records to process	🔄
PrivilegedAccounts	14 records to process	🔄
PrivilegedAccountsACL	13 records to process	🔄
RemoteSessionCredentialsACL	8 records to process	🔄

Page 1 of 2, items 1 to 15 of 27.

Status:

## 13 Error Console

Any errors experienced within Passwordstate will be logged on this screen, which can be reported to Click Studios for troubleshooting purposes.

 Error Console

Below is any error debugging information which you can export and provide to Click Studios to help troubleshoot any technical issues you may be having.

If you need Click Studios' help in troubleshooting any of the errors below, please export the contents of this Grid, and send us the CSV File contents and a description of how the error occurred to [support@clickstudios.com.au](mailto:support@clickstudios.com.au).

Date	Error Information	Event Type
<input type="text"/>  	<input type="text"/> 	<input type="text"/> 

No records to display.

[Export](#) | [Purge Error Data](#) | [Grid Layout Actions...](#)

## 14 Export All Passwords

The Export All Passwords screen allows you to export all Password records from the system to a CSV file.

There are two types of exports available - 1. a CSV file heading information per Password List, and 2. a CSV file which is formatted for importing into KeePass. Please refer to the KB Article in the User Manual titled 'Export All Passwords and Import into KeePass' for how to import into KeePass.

 **Note :** If you choose to export all passwords to a csv file, they must be stored away somewhere securely as the passwords appear as plain-text in the csv file

 Export All Passwords

To export all passwords from Passwordstate into a CSV file, please choose one of the options below, then click on the 'Export' button.

 **Please Note:** Due to the sensitive nature of exporting all the passwords, please consider the following:

1. One audit record will be added indicating you have run the report
2. Select 'Save' instead of 'Open' to avoid sensitive information being cached to your temporary internet files.

**Export Options**

Formatted CSV file with Unique Headings

KeePass Compatible CSV file

Add one 'Password Viewed' audit record for every password exported.

**Description**

Please select one of the available export options on the left, and click the 'Export' button.

[Export](#)

## 15 Host Types & Operating Systems

The Host Types & Operating Systems screen allows you to add additional Host Type and Operating System records which can be associated with Host records in Passwordstate.

Simply add or delete Host Types and Operating System types as appropriate.

### Hosts & Operating Systems

Below are all the Host Types and Operating Systems which can be used when adding or importing Hosts on the screen Resets -> Hosts.

#### Host Types & Operating Systems

	Actions	Host Type
>	▼	Firewall
>	▼	Linux
>	▼	Out-Of-Band Management
>	▼	Router
>	▼	Switch
>	▼	Unix
>	▼	Windows

[Add Host Type](#) | [View Operating Systems](#) | [Grid Layout Actions...](#) ▼

### Hosts & Operating Systems

Below are all the Operating Systems which can be used when adding or importing Hosts on the screen Resets -> Hosts.

#### Operating Systems

Actions	Operating System	Host Type	AD Attribute	Heartbeat Start Hour	Heartbeat End Hour
▼	Arch Linux	Linux	Arch Linux	0	0
▼	CentOS	Linux	CentOS	0	0
▼	Cisco ASA	Firewall	Cisco ASA	0	0
▼	Cisco CatOS	Switch	Cisco CatOS	0	0
▼	Cisco IOS	Router	Cisco IOS	0	0
▼	Cisco IOS	Switch	Cisco IOS	0	0
▼	Cisco PIX	Firewall	Cisco PIX	0	0
▼	Debian	Linux	Debian	0	0
▼	Dell iDRAC	Out-Of-Band Management	Dell iDRAC	0	0
▼	Fedora	Linux	Fedora	0	0

Change page:  Page 1 of 6, items 1 to 10 of 52.

[Return Previous Screen](#) | [Add Operating System](#) | [Grid Layout Actions...](#) ▼

When using the Account Heartbeat validation feature for Password records, you may only want the Heartbeat poll to occur during certain times for different Operating Systems. By editing each of the Operating System records, you can change this poll time e.g. You only want to validate local

administrator accounts for Windows 7 workstations during business hours.

**Edit Operating System**

Please make changes to the Operating System record below as appropriate.

Host Type \* Windows

Operating System \* Windows 7

AD Attribute \* Windows 7  
The AD Attribute field is used when 'Discovering' Hosts within your AD environment.

Heartbeat Hours \* 12:00 AM 12:00 AM  
Heartbeat checks the Host is online between the hours selected above.

Save Cancel

## 16 Images and Account Types

The 'Images and Account Types' screen allows you to upload images which can be used as icons for the Password List themselves, and also for the 'Account Type' field for Password records.

**Note 1:** All images exist on the web server file system in the path <Passwordstate Folder> \images\LookupImages, and are also stored within the Passwordstate database as well. Deleting them from the file system will caused them to be recreated once the Passwordstate Windows Service is next restarted.

**Note 2:** It is recommended you keep these images relatively small, inline with the size of the supplied images, otherwise it can distort the view of Password Lists in the Navigation Tree, and anywhere Account Type images are displayed

**Note 3:** If using the Passwordstate API, you may need to know the AccountTypeID for some of the images you see on this screen. To do this, simply click on the 'Toggle ID Column Visibility'

Images and Account Types

Listed below are all the Images which can be assigned to Password Lists in the navigation tree, or assigned to the Account Type field within Password records.

Actions	Account Type	Image File Name	Managed
	Active Directory	activedirectory.png	
	Android	android.png	
	Apple	apple.png	
	Application Account	stats.png	
	Calendar	calendar.png	
	CentOS	centos.png	
	Chrome	chrome.png	
	Cisco IOS	switches.gif	
	Cloud	cloud.png	
	Code	code.png	

[Add](#) | [Toggle ID Column Visibility](#) | [Grid Layout Actions...](#)

## 17 License Information

The License Information screen simply allows you to update your license registration keys for Passwordstate.

**Note 1:** When you purchase your renewal for Annual Support + Upgrades, it's import you update your 'Annual Support' registration key on this screen, otherwise you will be prevented from upgrading to new builds of Passwordstate.

**Note 2:** If you need to purchase additional Client Access Licenses, you can click on the 'Buy More Licenses' button and it will provide you with some instructions

### Licenses Information

To update details for one of the License Types below, please click on the appropriate License Type link.

**Please Note:** You can increase the number of Client Access Licenses anytime by simply purchasing more li

License Type	Registration Name	License Count	Expires	Registration
<a href="#">Client Access Licenses</a>	Click Studios	Enterprise (Unlimited)		EACB-0525-
<a href="#">Annual Support</a>	Click Studios	Enterprise (Unlimited)	2015-11-30	B7DD-C024
<a href="#">High Availability</a>	Click Studios	Enterprise (Unlimited)		79AF-BBC7-

[Buy More Licenses](#)

[Grid Layout Actions...](#)

## 18 Menu Access

The Menu Access screen allows you to specify which users or security groups are allowed to access the various main navigational menus in Passwordstate

By clicking on the appropriate 'Set Permissions' button, you can allow all users to have access, or just the ones you specify.

You can choose to either Disable the menu for users who do not have access, or hide it from them completely.

## Menu Access

To control who is allowed to access each of the main Vertical or Horizontal Menu items, please set Permissions for ea

If a user doesn't have access to a Menu:  Disable it for them  Hide it from them

 If a user doesn't have access to a top-level menu, then it will be hidden from them - not disabled.

## Passwords Menu

Menu	
 Add Folder	<a href="#">Set Permissions</a>
 Add Private Password List	<a href="#">Set Permissions</a>
 Add Shared Password List	<a href="#">Set Permissions</a>
 Administer Bulk Permissions	<a href="#">Set Permissions</a>
 Expiring Passwords Calendar	<a href="#">Set Permissions</a>
 Password List Templates	<a href="#">Set Permissions</a>
 Request Access to Password Lists	<a href="#">Set Permissions</a>
 Request Access to Passwords	<a href="#">Set Permissions</a>
 Toggle All Password Lists Visibility	<a href="#">Set Permissions</a>

## Tools Menu

Menu	
 Password Generator	<a href="#">Set Permissions</a>
 Remote Session Launcher	<a href="#">Set Permissions</a>
 Self Destruct Message	<a href="#">Set Permissions</a>

## Resets Menu

Menu	
 Hosts	<a href="#">Set Permissions</a>
 Hosts and Account Discovery	<a href="#">Set Permissions</a>
 Queued Password Resets	<a href="#">Set Permissions</a>
 Scripts - Account Discovery	<a href="#">Set Permissions</a>
 Scripts - Password Reset	<a href="#">Set Permissions</a>

## 19 Password Folders

The Password Folders screen show you all the Password Folders which have been created in Passwordstate. From this screen you can:

## Edit Password Folder Details & Delete the Folder

By clicking on the 'Password Folder' hyperlink you see in the grid, you will be taken to a screen where you can perform the following actions on the Folder:

- Edit name, description and settings
- Clone the folder and nested Password Lists and Folders (but not the passwords themselves)
- Delete the folder - deleting a folder will not delete any nested Folders or Password Lists

### Edit Folder Properties

To edit the Folder properties, please make appropriate changes and click on the 'Save' button.

folder properties

Please specify appropriate details below for the Password Folder, then click on the Save Button.

#### Folder Properties

Folder ID *	<input type="text" value="85"/>
Folder Name *	<input type="text" value="Customers"/>
Description	<input type="text" value="Customers"/>
Permalink	<input type="text" value="https://passwordstate7.halox.net/fid=85"/> 

**Prevent Non-Admin users from Dragging and Dropping this Folder in the Navigation Tree**

Yes  No

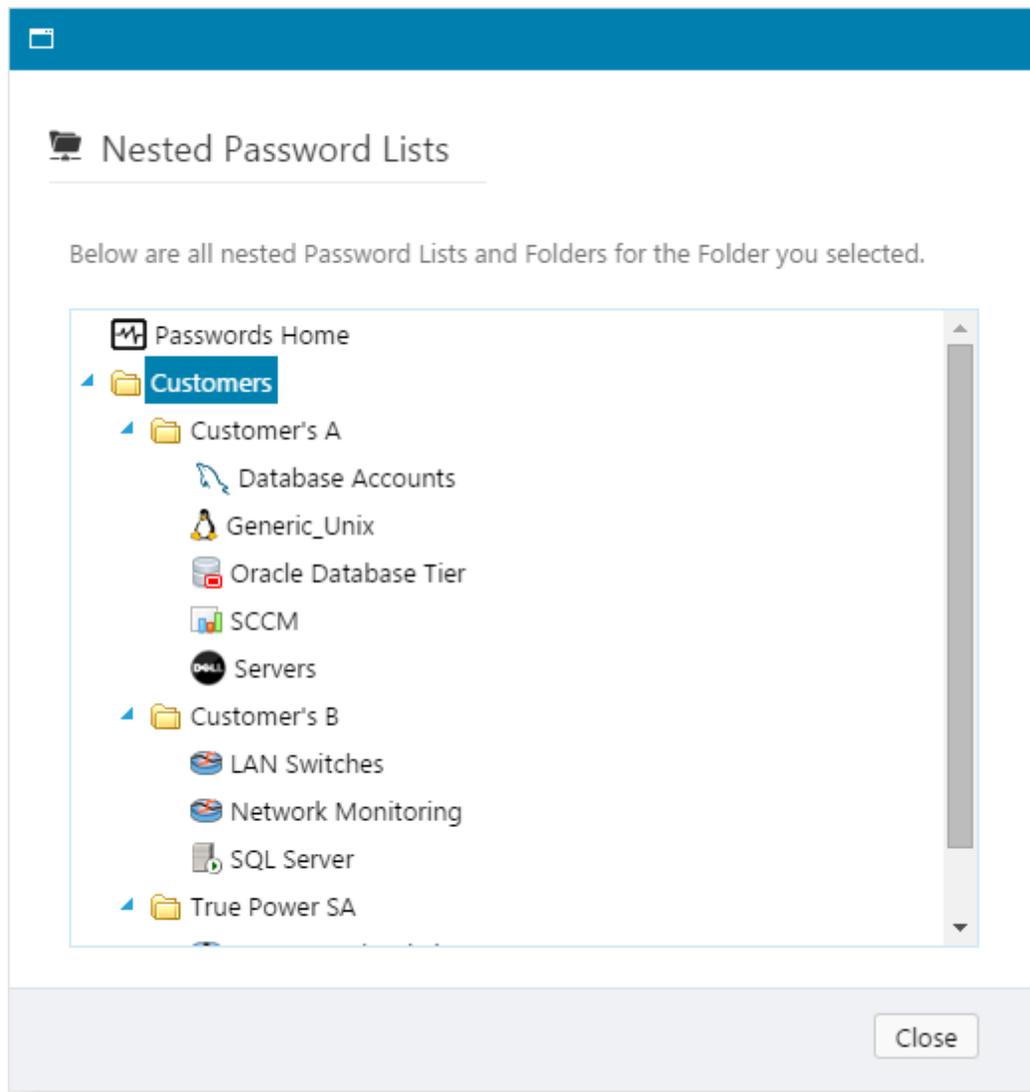
#### Folder Permission Model

**Manage permissions manually for this folder** (this means the Folder will not inherit permissions from any nested Password Lists)

Yes  No

## View Nested Password Lists

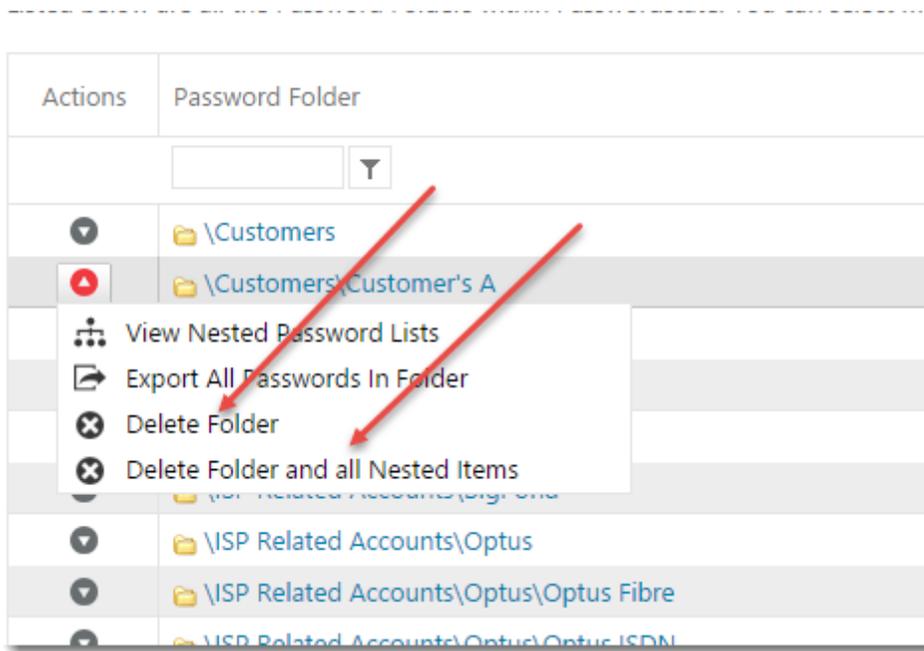
By selecting the option 'View Nested Password Lists' from the appropriate Actions drop-down menu, a popup screen will appear showing all Folders and Password Lists nested beneath the one you've chosen.



## Deleting Folders

Also in the 'Actions' menu are two options for deleting a folder:

- Delete Folder - will delete just the folder, and nothing else. The Navigation Menu will look different to your users once you've done this, as it will need to rearrange any nested Password Lists/Folders (you can only delete a single Folder if there are no Password Lists nested beneath it)
- Delete Folder and all Nested Items - Please use with caution, as this will delete all nested Password Lists/Folders, including all associated passwords



## 20 Password Generator Policies

The Password Generator Policies screen allows you to create and manage multiple settings for the Password Generator, which can then be applied to one or more Password Lists.

**Note:** The Default Password Generator policy cannot be deleted - it can be renamed and its settings modified, but it cannot be deleted.

When adding or editing a Password Generator Policy, you have the following options available to you:

### Password Generator Details

Edit the name and description for the Policy.

## Edit Password Generator Policy

Please use the various tabs below to specify options for the Password Generator Policy '**Default Password Generator**'.

passwords generator details	generate passwords	alphanumerics & special characters	word phrases
Please specify naming details for the Password Generator Policy Below.			
Policy Name *	<input type="text" value="Default Password Generator"/>		
Description	<input type="text" value="Default Password Generator with medium complexity of alphanumeric characters."/>		
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>

## Alphanumerics & Special Characters

The Alphanumeric & Special Characters tab allows you to specify the desired length of the password you wish to generate, as well as settings for letters, numbers, special characters and various forms of brackets.

The screenshot shows the 'alphanumerics & special characters' configuration tab in the Passwordstate interface. The interface has a blue header with four tabs: 'passwords generator details', 'generate passwords', 'alphanumerics & special characters', and 'word phrases'. The 'alphanumerics & special characters' tab is active. Below the header, there are several sections:

- Include Alphanumerics & Special Characters:** A checked checkbox.
- Password Length:** A section with two input fields: 'Min Length' set to 5 and 'Max Length' set to 7.
- Alphanumerics:** A section with four checkboxes: 'Lower-case' (checked), 'Upper-case' (checked), 'Numbers' (checked), and 'Include higher ratio of alphanumerics vs special characters' (checked). There is also an unchecked checkbox for 'Include ambiguous alphanumerics (l, I, o, 0 and 1)'. Below this is a text input field for 'Exclude the following characters and numerics'.
- Special Characters:** A section with two checkboxes: 'Include the following special characters' (checked) and 'Include the following brackets' (unchecked). The first checkbox has a text input field containing '!@#%&^&\*+/\_-'. The second checkbox has a text input field containing '[]{}<>'.
- Generate Using a Pattern:** A section with an unchecked checkbox 'Generate based on a pattern of upper and lowercase letters, and numbers'. Below it is a text input field and a legend: 'l for Lowercase, u for uppercase, n for numbers and s for special characters i.e. ullllnnnnssss'.

At the bottom right of the form are 'Save' and 'Cancel' buttons.

## Word Phrases

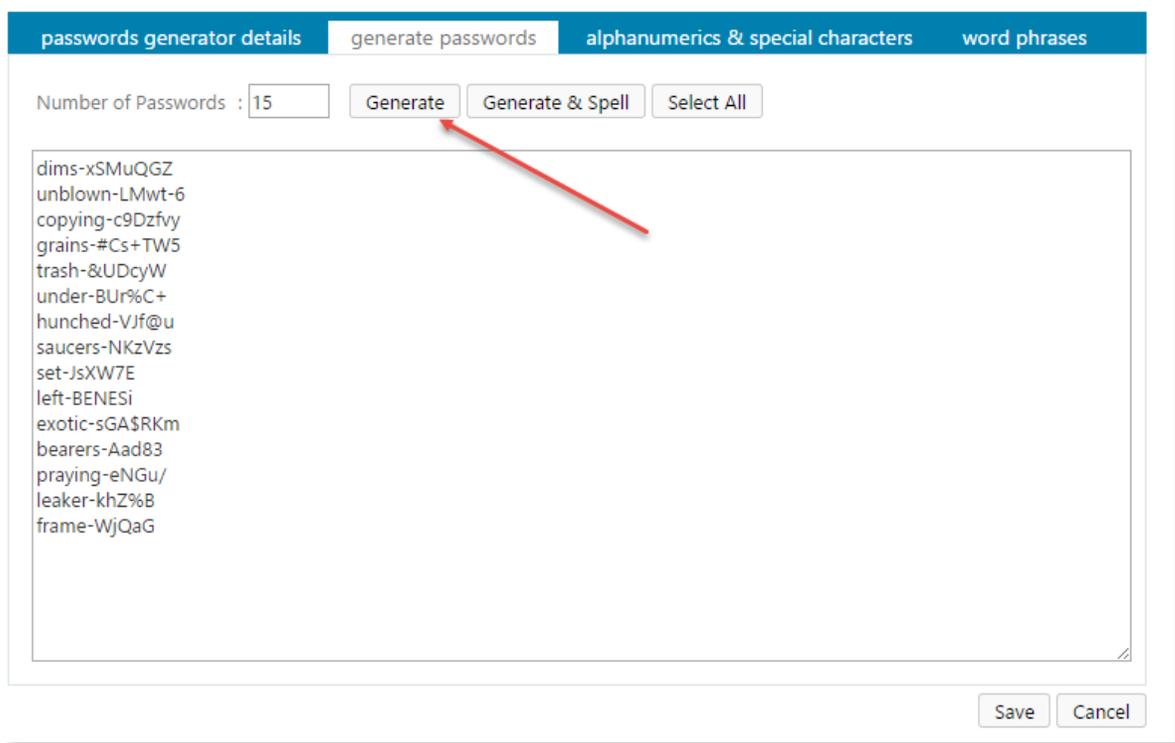
The Word Phrases tab allows you to insert a random word at the beginning of the password, somewhere in the middle, or at the end. You can specify how many words to create, what length, and what form of separation you would like between the word and the rest of the random password - either dashes, spaces or nothing.

Passwordstate has 10,000 different words it can choose from, all of different lengths.

The screenshot shows the 'word phrases' tab of a password generator interface. At the top, there are four tabs: 'passwords generator details', 'generate passwords', 'alphanumerics & special characters', and 'word phrases'. The 'word phrases' tab is active. Below the tabs, there is a checked checkbox labeled 'Include Word Phrases'. Underneath, there are three sections: 'Quantity & Length' with input fields for 'Number of Words' (set to 1) and 'Maximum Word Length' (set to 7); 'Positioning' with three radio button options: 'Prefix Words to Alphanumerics & Special Characters' (selected), 'Append Words to Alphanumerics & Special Characters', and 'Insert Randomly into Alphanumerics & Special Characters'; and 'Separation' with three radio button options: 'Separate Words with Dashes' (selected), 'Separate Words with Spaces', and 'No Separation'. At the bottom right, there are 'Save' and 'Cancel' buttons.

## Generate Passwords

The Generate Passwords tab allows you to test the settings you have specified on the other tabs, and also generate any number of random passwords based on your settings. Click on the 'Generate' button just gives you the random passwords.



passwords generator details generate passwords alphanumeric & special characters word phrases

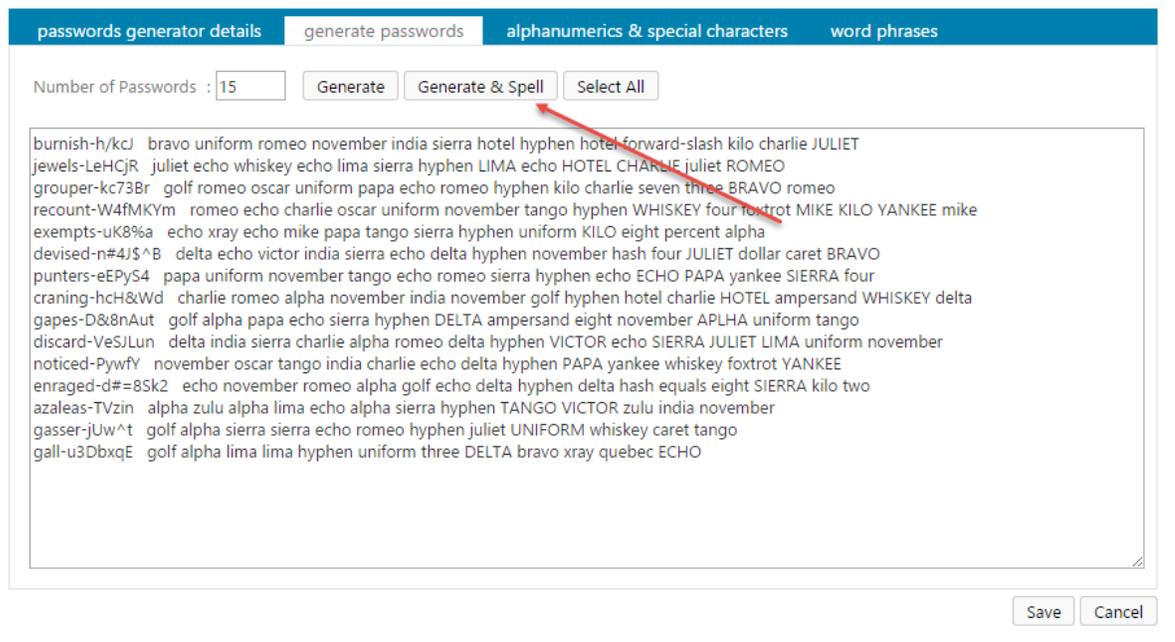
Number of Passwords :

```

dims-xSMuQGZ
unblown-LMwt-6
copying-c9DzfvY
grains-#Cs+TW5
trash-&UDcyW
under-BUR%C+
hunched-VJf@u
saucers-NKzVzs
set-JsXW7E
left-BENESi
exotic-sGA$RkM
bearers-Aad83
praying-eNGu/
leaker-khZ%B
frame-WjQaG

```

Clicking on the 'Generate & Spell' button, gives you the random passwords, and spells them out for you as well.



passwords generator details generate passwords alphanumeric & special characters word phrases

Number of Passwords :

```

burnish-h/kcJ bravo uniform romeo november india sierra hotel hyphen hotel forward-slash kilo charlie JULIET
jewels-LeHCjR juliet echo whiskey echo lima sierra hyphen LIMA echo HOTEL CHARLIE juliet ROMEO
grouper-kc73Br golf romeo oscar uniform papa echo romeo hyphen kilo charlie seven three BRAVO romeo
recount-W4fMKYm romeo echo charlie oscar uniform november tango hyphen WHISKEY four fox trot MIKE KILO YANKEE mike
exempts-uK8%a echo xray echo mike papa tango sierra hyphen uniform KILO eight percent alpha
devised-n#4J$^B delta echo victor india sierra echo delta hyphen november hash four JULIET dollar caret BRAVO
punters-eEPyS4 papa uniform november tango echo romeo sierra hyphen echo ECHO PAPA yankee SIERRA four
craning-hcH&Wd charlie romeo alpha november india november golf hyphen hotel charlie HOTEL ampersand WHISKEY delta
gapes-D&8nAut golf alpha papa echo sierra hyphen DELTA ampersand eight november APLHA uniform tango
discard-VeSJLun delta india sierra charlie alpha romeo delta hyphen VICTOR echo SIERRA JULIET LIMA uniform november
noticed-PywFY november oscar tango india charlie echo delta hyphen PAPA yankee whiskey foxtrot YANKEE
enraged-d#=8Sk2 echo november romeo alpha golf echo delta hyphen delta hash equals eight SIERRA kilo two
azaleas-TVzin alpha zulu alpha lima echo alpha sierra hyphen TANGO VICTOR zulu india november
gasser-jUw^t golf alpha sierra sierra echo romeo hyphen juliet UNIFORM whiskey caret tango
gall-u3DbxqE golf alpha lima lima hyphen uniform three DELTA bravo xray quebec ECHO

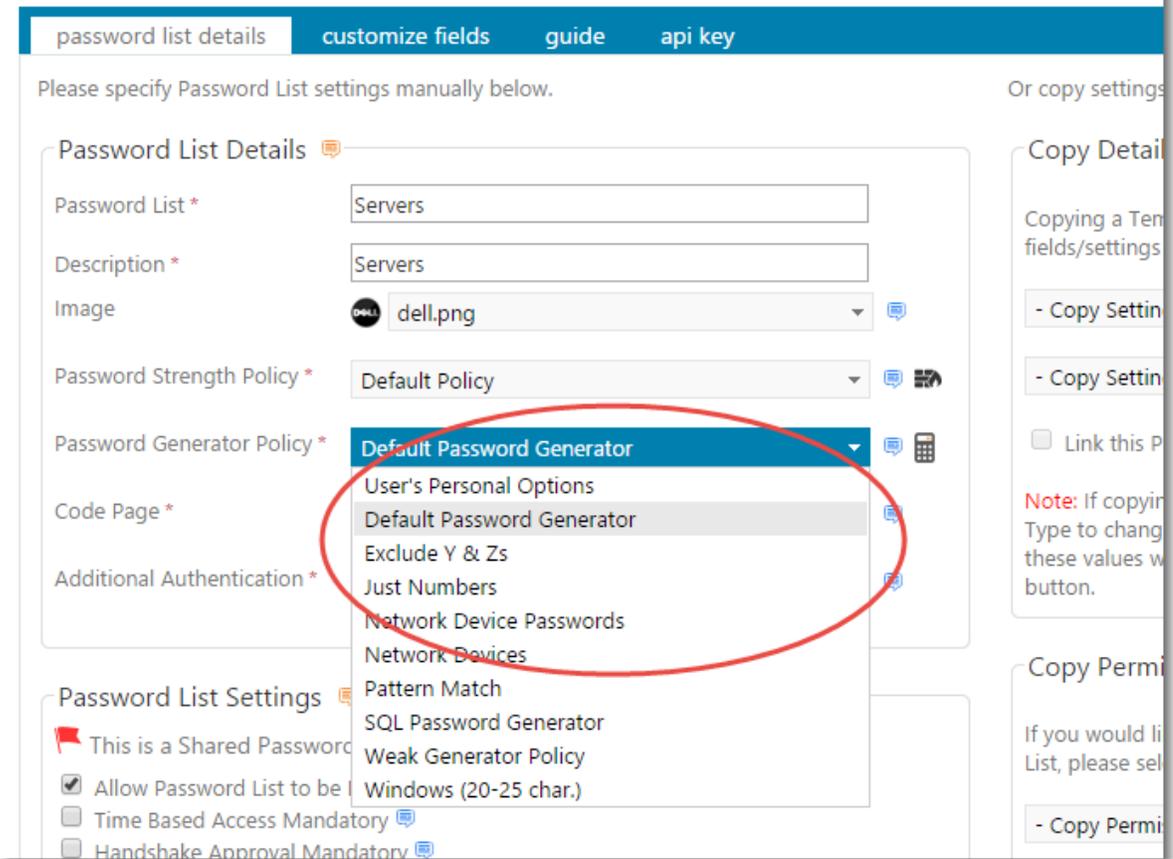
```

Once a Password Generator Policy has been created, it can be assigned to a Password List or

Password List Template, by editing the appropriate settings, as per this screenshot below. When your users now click on the  icon, the random password generated will be based on the selected Password Generator Policy.

### ☰ Edit Password List

To edit the details for the selected Password List, please fill in the details below for each of the various tabs.



### Toggle Visibility of Web API IDs

When using the Passwordstate Web API, there are certain API calls which can also automatically generate passwords. In order to specify which policy to use when making these API calls, you need to know the PasswordGeneratorID value - a unique identifier for each policy. By clicking on the 'View Visibility of Web API IDs' button, you will see the PasswordGeneratorID values as per this screenshot:

 Password Generator Policies

Listed below are all the Password Generator Policies which can be assigned to specific

	Actions	PasswordGeneratorID	Password Generator Policy Name
>	▼	1	Default Password Generator
	▼	108	Exclude Y & Zs
>	▼	5	Just Numbers
>	▼	109	Network Device Passwords
	▼	110	Network Devices
>	▼	111	Pattern Match
	▼	2	SQL Password Generator
	▼	8	Weak Generator Policy
	▼	7	Windows (20-25 char.)

Add | Toggle Visibility of Web API IDs | Grid Layout Actions...

## 21 Password Lists

The Password Lists screen shows all **Password Lists** created in Passwordstate, regardless of whether your account has Administrative rights to the Password Lists or not.

 Note 1: You can view which Private Password Lists have been created, and who created them, but you cannot manage any permissions or settings for them

 Note 2: For the Shared Password Lists, you cannot grant yourself access to any Shared Password Lists you do not already have access to

 Note 3: When clicking on a Shared Password List, all passwords will be hidden and some features will be disabled for you

From this screen, the following features are available:

### Actions Menu - Edit Password List Details

By clicking on the 'Edit Password List Details' menu option in the 'Actions' drop-down menu, you will be able to edit settings for the selected Password List.

 Note: Please refer to the Passwordstate User Manual for detailed instructions on settings which can be applied to a Password List or Template.

## Actions Menu - View Password List Permissions

By clicking on the 'View Password List Permissions' Action menu, you can view all permissions which are applied to the Password List. From here you can make any number of changes to permissions as required.

## Actions Menu - Bulk Permissions for Individual Passwords

By clicking on the 'Bulk Permissions for Individual Passwords' menu option in the 'Actions' drop-down menu, you will be able to apply permissions for a user account or security group to multiple individual password records at once.

### 👤 Administer Bulk Permissions for Individual Passwords

This screen allows you to apply permissions to more than one individual password record at a time for a User or Security Group. This does not affect permissions for any Password List. Administering Bulk Permissions is a three step process - 1. Search for a User or Security Group, 2. Apply new or modify existing permissions, and 3. Save the changes.

access permissions | time based access

Search for an appropriate user or security group, and apply the required permissions for passwords in the Password List 'Database Accounts' (use \* to search for all).

Search : wayne

Search For :  User  Security Group

Search Results	Available Passwords	View Permissions	Reason for Access
<ul style="list-style-type: none"> <li>John Wayne</li> <li>Wayne Archer</li> </ul>	<ul style="list-style-type: none"> <li>msand</li> <li>passwordstate</li> <li>testuser SQL Account</li> <li>tsand</li> </ul>	<p>&gt;&gt;</p> <p>&lt;&lt;</p>	
		<p>Modify Permissions</p> <p>&gt;&gt;</p> <p>&lt;&lt;</p>	
		<p>Administrator Permissions</p> <p>&gt;&gt;</p> <p>&lt;&lt;</p>	

Status: Save Cancel

## Actions Menu - Convert to Private Password List

Under certain circumstances, you may want to change a Shared Password List into a Private one.

**Warning:** Please use this feature with caution, as it is an irreversible process once complete - you will need to restore a copy of your database if you wish to undo any changes with this feature.

In order to use this feature, you must first apply permissions to only the intended recipient of the

Private Password List - meaning you must remove all Security Group permissions, and any other 'user account' based permissions why are not appropriate for a Private Password List. Once you have done this and select this feature, the following processes will occur:

- Delete any 'permission' records applied at the individual password record level
- Delete any 'Favorite' password records for the list
- Delete any linkages to Password List Templates
- If any users have the Password List set as their Default Home Page, then it will be changed to the 'Passwords Home' node in the Navigation Tree
- And finally it will marked the Password List as private

## Actions Menu - Delete Password List

---

By selecting the 'Delete Password List' menu option in the 'Actions' drop-down menu, you will be given the opportunity to delete the selected Password List.

 **Warning:** You are prompted twice to delete a Password List, or there is no Recycle Bin in the event you do delete one - so be sure you no longer require the passwords in this List. If you accidentally delete a Password List and still require it, you will need to ask your DBAs restored a copy of the database.

## Add Password List

---

By clicking on the 'Add Password Lists' button, you will be able to add a new Password List to Passwordstate.

 **Note:** Please refer to the Passwordstate User Manual for detailed instructions on settings which can be applied to new Password Lists or Templates.

## Export

---

The Export button simply allows you to export the list of Password Lists to a csv file - no Passwords are exported, just basic information about the Password Lists themselves.

## Toggle ID Column Visibility

---

The Toggle ID Column Visibility button will either show or hide the PasswordListID value for each of the Password Lists. These PasswordListID values may be required if you are using the Passwordstate API, or the Bulk Password Import feature below.

Clicking on a Shared Password List allows you to **Administer Permissions and Edit Password L**

Actions	PasswordListID	Password List
	<input type="text"/>	<input type="text"/>
▼	340	\Banking Sites
▼	30	\Canon Printers
▼	4174	\Customers\Customer's A\Database Accounts
▼	1648	\Customers\Customer's A\Generic_Unix
▼	4	\Customers\Customer's A\Oracle Database Tier
▼	11	\Customers\Customer's A\SCCM
▼	34	\Customers\Customer's A\Servers
▼	346	\Customers\Customer's B\LAN Switches
▼	10	\Customers\Customer's B\Network Monitoring
▼	7	\Customers\Customer's B\SQL Server
▼	2069	\Customers\True Power SA\Routers and Switches

## Perform Bulk Processing - Administer Bulk Permissions

Administer Bulk Permissions allows you to apply new permissions, or remove permissions, for a user account or security group to multiple Password Lists at once.

After you have searched for a user account or security group, and then clicked on it, the 'Available Password Lists' listbox shows which Password Lists the user/security group does not have access to, and the 'View/Modify/Administrator Permissions' listbox shows what Password Lists the user/security group already has access to.

To apply new permissions, or remove existing permissions, simply move the Password Lists between the different listboxes using the various arrow buttons, then click on the Save button.

**Note:** You cannot manage permissions here for Password Lists which have mandatory options set for Time-Based Access, or Handshake approval.

### 👤 Administer Bulk Permissions for Password Lists

Administering Bulk Permissions is a three step process - 1. Search for a User or Security Group, 2. Apply new or modify existing permissions, and 3. Save the changes.

**Please Note:** You cannot administer bulk permissions for Password Lists which have mandatory options set for Time Based Access, or Handshake Approval, as these require additional settings to be applied

The screenshot shows the 'access permissions' configuration window. At the top, there is a search bar with a magnifying glass icon and a search button. Below the search bar, there are radio buttons for 'User' and 'Security Group'. The main area is divided into several sections:

- Search Results:** A list of users and security groups, with 'SecurityGroup1' selected.
- Available Password Lists:** A list of password lists with a filter box. The list includes items like '\Banking Sites', '\Canon Printers', and '\Customers\Customer's A\Database Accounts'.
- View Permissions:** A panel with '>>' and '<<' buttons, currently empty.
- Modify Permissions:** A panel with '>>' and '<<' buttons, containing '\Customers\Customer's A\SCCM'.
- Administrator Permissions:** A panel with '>>' and '<<' buttons, containing '\Customers\True Power SA\Routers and Switches' and '\Customers\True Power SA\Stealth Appliances'.
- Mobile Access:** A section with the text 'Enabled Mobile Access for these permissions:' and radio buttons for 'Yes' and 'No'.
- Reason for Access:** A large empty text area.

At the bottom right, there are 'Save' and 'Cancel' buttons. The status bar at the bottom left is empty.

## Perform Bulk Processing - Bulk Copy/Move Passwords

The Bulk Copy/Move Passwords feature allows you to Copy, Move or Copy & Link multiple passwords from multiple Password Lists to a different Password List at once - instead of doing one record at a time as users can do through the standard interface. This feature is useful if you are re-organizing your Password Lists, and need to move records around in mass.

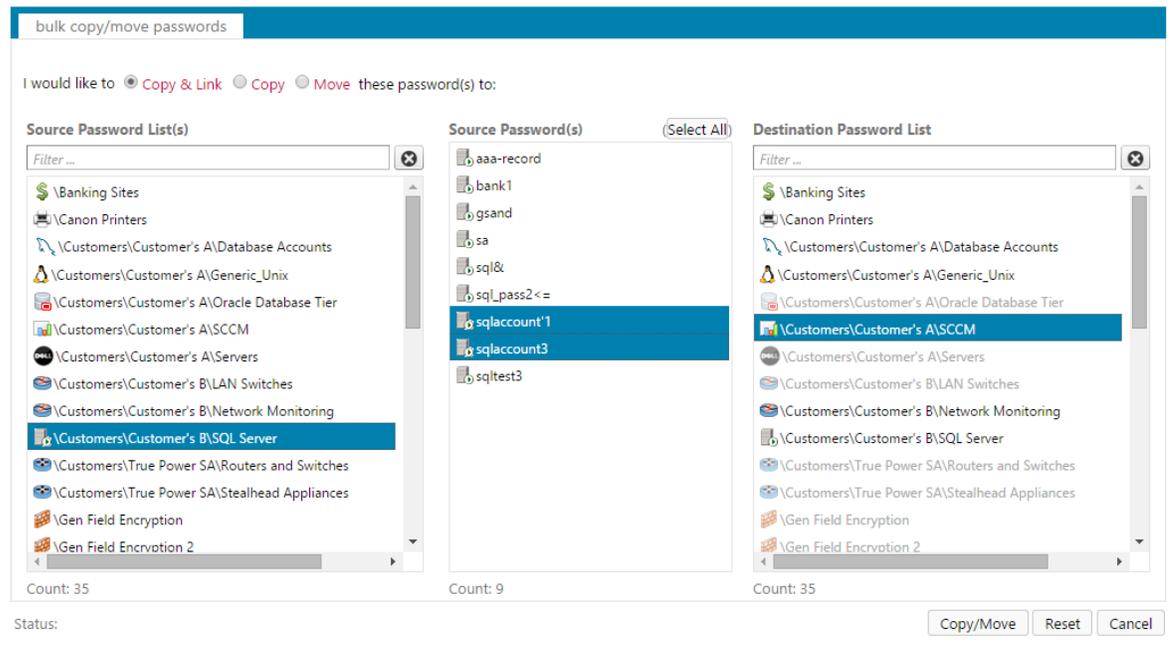
**Note:** You can only copy/move records between Password Lists which have similar fields configured. If the fields are not compatible, then the destination Password List will be disabled, preventing you from copying/moving records to it.

## Bulk Copy/Move Passwords

To copy/move multiple Passwords from one Password List to another is a 3 step process:

1. Select the Source Password List(s)
2. Select all the Source Passwords you want to move
3. Select the Destination Password List, and click the 'Copy/Move' button

**Note:** Any Password Lists which have incompatible Generic Field settings will be disabled.



## Perform Bulk Processing - Bulk Password Import

The Bulk Password Import feature is useful when you are migrating data from another system, as it allows you to import multiple passwords records into multiple different Password Lists at once.

To import passwords in bulk is a 3 step process:

### Step 1 - Generate CSV Template

By clicking on the 'Generate CSV Template' button you will be able to save an empty csv template file to your file system. It is this template you need to populate with data, ready for import.

## Bulk Password Import

To import multiple passwords in to one or more Password Lists at a time, please follow the instructions on each of the Tabs below.

step 1 - generate csv template    step 2 - populate template with data    step 3 - import data

To create a CSV template file ready for you to enter data into it, please click on the button below. Once you have saved the csv template, you can continue to the '**Step 2 - Populate Template with Data**' tab.

**Note 1:** The PasswordListID column must be populated, and you can determine the values required here by returning to the previous screen and either Exporting the list of Password Lists, or by clicking on the 'Toggle ID Column Visibility' button

**Note 2:** Some Password Lists may not use all the fields in this CSV template, or Generic Fields may be named differently, so enter or omit data as appropriate

**Note 3:** Various compliance checks **will not** be performed with this import i.e. Bad Passwords, Password Strength Compliance & Mandatory fields.

Status:

### Step 2 - Populate Template with Data

The screenshot below shows the fields which are populated in the csv template file, which fields are required, and the maximum size of any fields.

You will notice 10 Generic Fields in the csv template. By default, Password Lists are not configured to use any of the available Generic Fields, but it's possible they may have been configured to use them. Generally the Generic Fields are named differently, but those names cannot be shown in the csv template, as each Password List may have named them differently. You will need to ensure you populate the csv template file with the correct fields for each of the different Password Lists you are importing into.

-  Note 1: If a field is not 'Required', then you can leave it blank in the csv template
-  Note 2: The PasswordListID field is required so the import process knows which Password Lists to import the passwords into. The PasswordListID values can be determined by returning to the previous screen and either Exporting the list of Password Lists, or by clicking on the 'Toggle ID Column Visibility' button
-  Note 3: Various compliance checks will not be performed with this import i.e. Bad Passwords, Password Strength Compliance & Mandatory fields

## Bulk Password Import

To import multiple passwords in to one or more Password Lists at a time, please follow the instructions on each of the Tabs below.

**step 1 - generate csv template**    **step 2 - populate template with data**    **step 3 - import data**

Now that you have a saved CSV Template, below are the columns you are expected to populate with data as appropriate.

Once you have finished populating your CSV file and saved it, please click on the '**Step 3 - Import Data**' tab.

Column Name	Size (Max)	Required
PasswordListID	NA	✓
Title	255	✓
UserName	255	
Description	255	
AccountType	NA	
Notes	NA	
URL	255	
Password	NA	
ExpiryDate	NA	
GenericField1	NA	
GenericField2	NA	
GenericField3	NA	
GenericField4	NA	
GenericField5	NA	
GenericField6	NA	
GenericField7	NA	
GenericField8	NA	
GenericField9	NA	
GenericField10	NA	

**Please note:** Any Password Lists who have the column 'AccountType' selected can use any of the values displayed in this Listbox.

- Available Account Types - ▾

Status: Cancel

### Step 3 - Import Data

Once you have populated the csv file with the required data, the 'Step 3' tab allows you to either test the import process, or perform the actual import. It is recommended you test the import process first, and any errors will be reported back to you, including the line number in the csv file so you're able to correct the data.

 Bulk Password Import

To import multiple passwords in to one or more Password Lists at a time, please follow the instructions on each of the Tabs below.

step 1 - generate csv template    step 2 - populate template with data    **step 3 - import data**

Now you are ready to import your newly populated csv template. To do so, please select your CSV file by clicking the '**Select**' button, then click on the '**Import Passwords**' button.

**Please Note:** It is advised you click on the 'Test Import' button first to ensure there are no issues with importing the data.

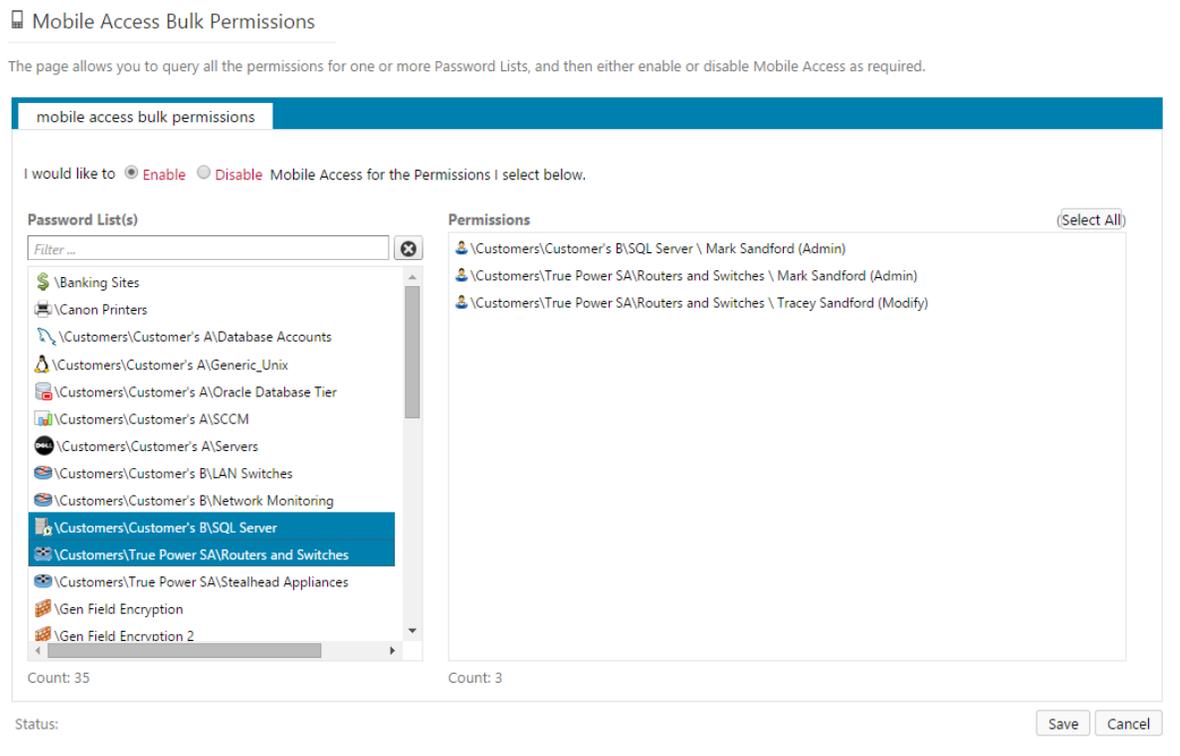
          

Status:

## Perform Bulk Processing - Mobile Access Bulk Permissions

If you need to make many changes to Mobile Access Permissions at once, you can use the 'Mobile Access Bulk Permissions' feature.

This feature allows you to query all the permissions applied to one or more Password Lists, select the appropriate permissions (Guest, View, Modify or Admin), and then either enable or disable access for Mobile Clients.



## 22 Password List Templates

Password List Templates can be used to apply consistency to settings for your Password Lists, and accessing the Templates from within the Administration area allows you to see all Templates created by all user. Templates can be used in the following way:

- You can apply a Template's settings as needed (once off) when you add a new Password List, or edit an existing Password Lists' settings
- You can link Password Lists to a Template, and then manage all settings from the Template. When you do this, the majority of options for the Password List will be disabled when you chose to Edit Password List Details
- You can also apply permissions to a Template, and these permissions can be used for:
  - Allow other users to see the Templates via the 'Password List Templates' menu option
  - Allow other users to also modify the settings for the Template via the 'Password List Templates' menu option
  - Applying permissions to a Password List as needed (once off) when you add a new Password List, or edit an existing Password Lists' settings

**Note:** Permissions on a Template are not used when Linking Password Lists to a template - this can only be done when adding a new Password List, or editing the settings for an existing one.

### Password List Templates

Listed below are all the Password List Templates stored within Passwordstate.

Actions	Password List	Description	Linked Password Lists	Deny Export	Time Based Access	Handshake Approval	Prevent Password Reuse
	<input type="text"/>	<input type="text"/>					
	All Options Enabled	PreventDragDrop	0		✓	✓	✓
	Corporate ISP Accounts Template	Corporate Dial-up ISP Accounts for travellers	1				
	Gen Field Encryption Testing	Gen Field Encryption Testing	0				✓
	Local Admin Accounts Template	Local Admin Accounts Template	0				
	My Personal Sites	My Personal Sites	0				
	Oracle DB Template	Oracle Database Password List	0				✓
	Riverbead Stealhead Template	For the Riverbead Stealhead appliances	0				✓
	SQL Database Template	Normal template for storing SQL Accounts	0		✓		✓
	TestTemplate	TestTemplate	0				
	WAN Routers - Secure	National Wide Area Network Routers	1				✓
	Web Site's	Various web sites on the net	0				✓
	Windows Test Template	Windows Test Template	0				

Add New Template | Toggle ID Column Visibility | Grid Layout Actions...

## Adding and Editing Templates

Adding or editing templates in the Administration area is identical to the normal Password List Templates screens which standard user accounts have access to. For information on each of the settings which can be applied to a Template, please refer to the Passwordstate User Manual for creating Password Lists.

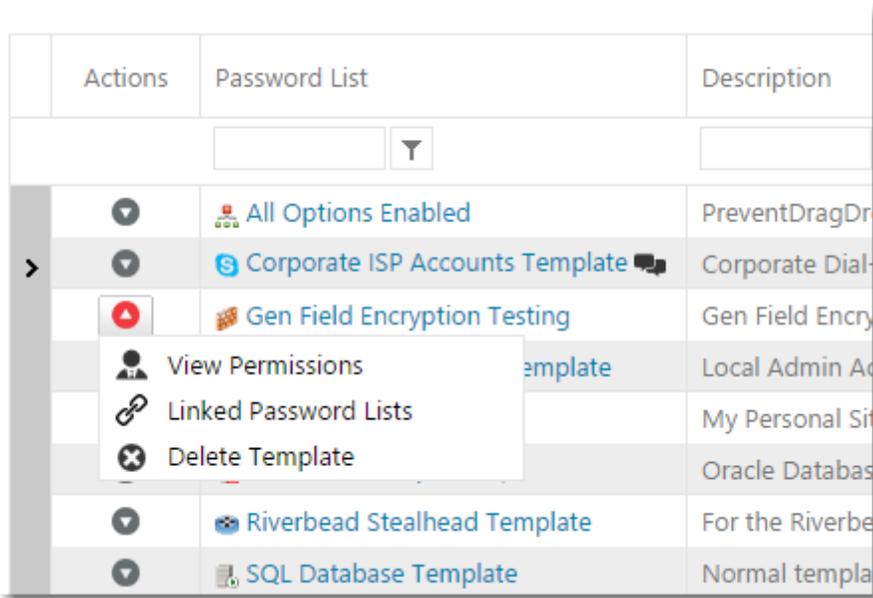
**Caution:** When editing a Template's settings when it is linked to other Password Lists, if you change any of the Field Types for any Generic Fields, these fields will have their data cleared/blanked in the database when you click on the 'Save' button. This is because the different Generic Field Field Types need to have their data treated differently. There are multiple warning messages within the Passwordstate as well for this, so please be aware.

## Password List Template Actions

From the 'Actions' drop-down menu, you have various features available:

- View Permissions applied to the Template - this also allows you to add/update/delete permissions as required
- You can Link Password Lists to the Template
- You can delete the template

**Note:** If you delete a Template which is linked to one or more Password Lists, these Password Lists will be set to use the Templates' settings as there were prior to you deleting the Template. You can then go ahead and modify the settings of the Password Lists as required.



Actions	Password List	Description
	<input type="text"/> <input type="button" value="Y"/>	
▼	All Options Enabled	PreventDragDr
> ▼	Corporate ISP Accounts Template	Corporate Dial
▲	Gen Field Encryption Testing	Gen Field Encry
View Permissions	template	Local Admin Ac
Linked Password Lists		My Personal Sit
Delete Template		Oracle Databas
▼	Riverbead Stealhead Template	For the Riverbe
▼	SQL Database Template	Normal templa

## Linked Password Lists

When you link one or more Password Lists to a Template, the majority of settings for the linked Password Lists are then managed via the Template - which the exception of the details on the API Key Tab.

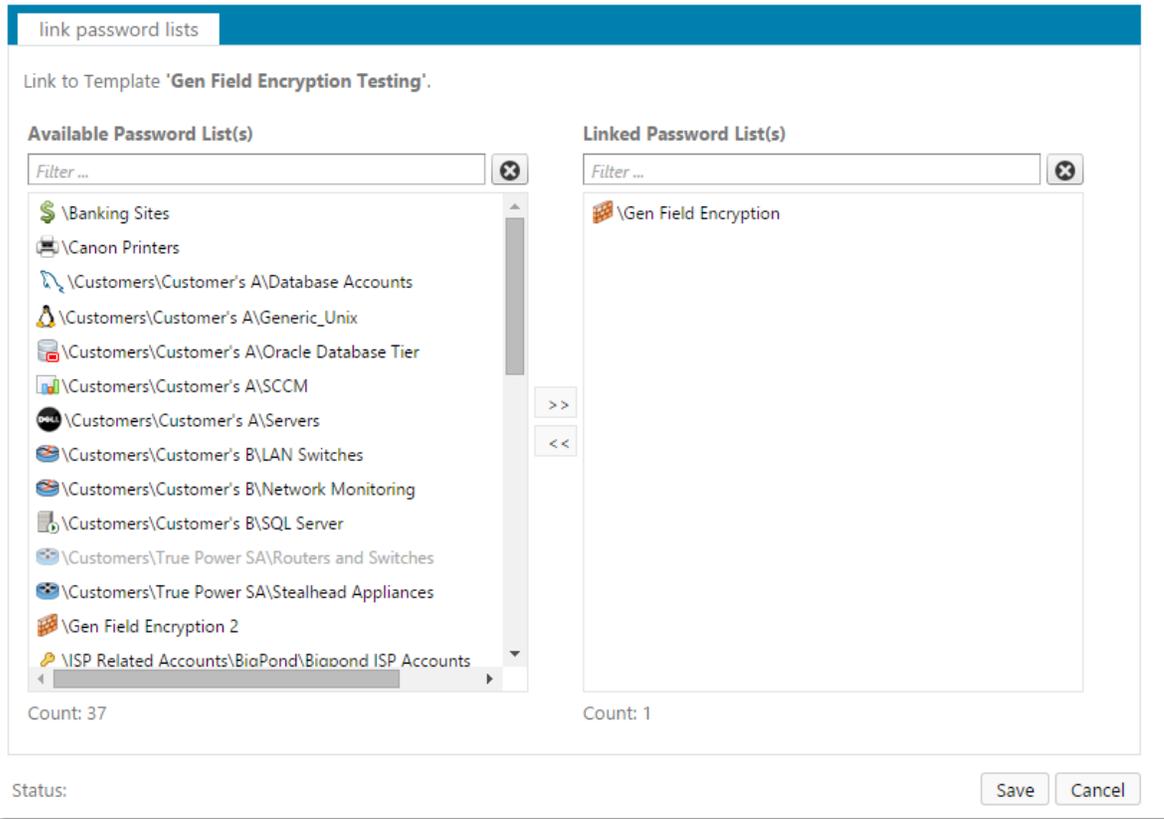
Linking Password Lists to a Template is very simply process - move the Password List you want to link into the 'Linked Password List(s)' text box, and click on the 'Save' button.

**Caution:** When linking Password Lists to a Template for the first time, if the Password List has some Generic Fields specified which are different to any Generic Fields specified for the Template, these fields will have their data cleared/blanked in the database when you click on the 'Save' button. This is because the different Generic Field Field Types need to have their data treated differently. There are multiple warning messages within the Passwordstate as well for this, so please be aware.

## ☰ Linked Password Lists

Below are a list of Password Lists which can be, or are already linked, to the Template '**Gen Field Encryption Testing**'.

**Note 1:** A Password List can only be linked to one Template at a time. If already linked to another Template, it will be disabled in the 'Available' list.  
**Note 2:** If you link a Password List to this Template, and the Template has different Generic Field field types compared to the Password List, there will be a warning for the Password List (when you click on the 'Save' button).



## 23 Password Resets

Some of the features under the main Menu 'Resets' are permission based. If, for whatever reason, users aren't able to administer the settings and records under this menu because they don't have access, you can make changes or grant access via this page.

By clicking on any one of the buttons you see in the screenshot below, will give you full access to these menu items. From here you can change settings, delete records, or apply new permissions for users or security groups.

## Password Resets

The buttons below will give you full access to each of the relevant screens under the main Reset menu.

From here, you can apply/fix permissions on Discovery Jobs, and also restore default scripts if required.



## 24 Password Strength Policies

Password Strength Policies are used as a set of rules for determining the strength of a Password. Once a policy is created, it can be applied to one or more Password Lists.

When adding or editing a Password Strength Policy, settings can be applied on 2 of the tabs, and there is 1 tab for testing the policy.

### Policy Settings Tab

The Policy Settings Tab allows you to provide a name and description for the policy, plus the following settings:

- Minimum LowerCase Characters - specifies how many lowercase characters are required as a minimum (abcd, etc)
- Minimum UpperCase Characters - specifies how many uppercase characters are required as a minimum (ABDCD, etc)
- Minimum Numeric Characters - specifies how many numeric characters are required as a minimum (1,2,3,etc)
- Minimum Symbol Characters - specifies how many symbol characters are required as a minimum (%@:!, etc)
- Preferred Password Length - specifies the minimum number of total characters the password should have
- Requires Upper And Lower Case - indicates if the passwords string must have both lower and uppercase characters
- Password Strength Compliance - indicates the desired Password Strength Complexity (Very Poor, Weak, Average, Strong or Excellent). With the following graphic when editing/adding a password, the 'Compliance Strength' indicator shows the user what password complexity is desired for the applied policy

- Compliance is Mandatory - if this option is set to Yes, the user will not be able to save the

password record if the strength of the password they're creating does not meet the 'Password Strength Compliance' setting above

## Edit Password Strength Policy

Please specify your password strength policy settings in each of the appropriate tabs below, and click on the 'Save' button.

Note: the policy is not enforced when entering a password, instead it's used as a visual representation of password strength.

test password strength    policy settings    calculation weighting

Please specify details for the Password Strength Policy Below.

Policy Name *	:	<input type="text" value="Default Policy"/>
Policy Description	:	<input type="text" value="Default policy if no specific policy is set for a Password List"/>
Minimum LowerCase Characters *	:	<input type="text" value="1"/>
Minimum UpperCase Characters *	:	<input type="text" value="1"/>
Minimum Numeric Characters *	:	<input type="text" value="1"/>
Minimum Symbol Characters *	:	<input type="text" value="1"/>
Preferred Password Length *	:	<input type="text" value="8"/>
Requires Upper And Lower Case *	:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Password Strength Compliance * 	:	<input type="text" value="Strong"/>
Compliance is Mandatory * 	:	<input type="radio"/> Yes <input checked="" type="radio"/> No

## Calculated Weighting Tab

The Calculated Weighting Tab allows you to specify the weighting of a strength characteristic of a password for length, numeric, case and symbols. The higher the weighting, the more important the category is deemed to be.

 Note: The 4 values specified must total 100.

## Edit Password Strength Policy

Please specify your password strength policy settings in each of the appropriate tabs below, and click on the 'Save' button.

Note: the policy is not enforced when entering a password, instead it's used as a visual representation of password strength.

test password strength	policy settings	calculation weighting
Calculation Weighting allows you to determine the weighting of a strength characteristic of a password for length, numeric, case and symbols. The 4 values specified must total 100.		
Length Weighting *	:	<input type="text" value="50"/>
Numeric Weighting *	:	<input type="text" value="15"/>
Casing Weighting *	:	<input type="text" value="15"/>
Symbol Weighting *	:	<input type="text" value="20"/>

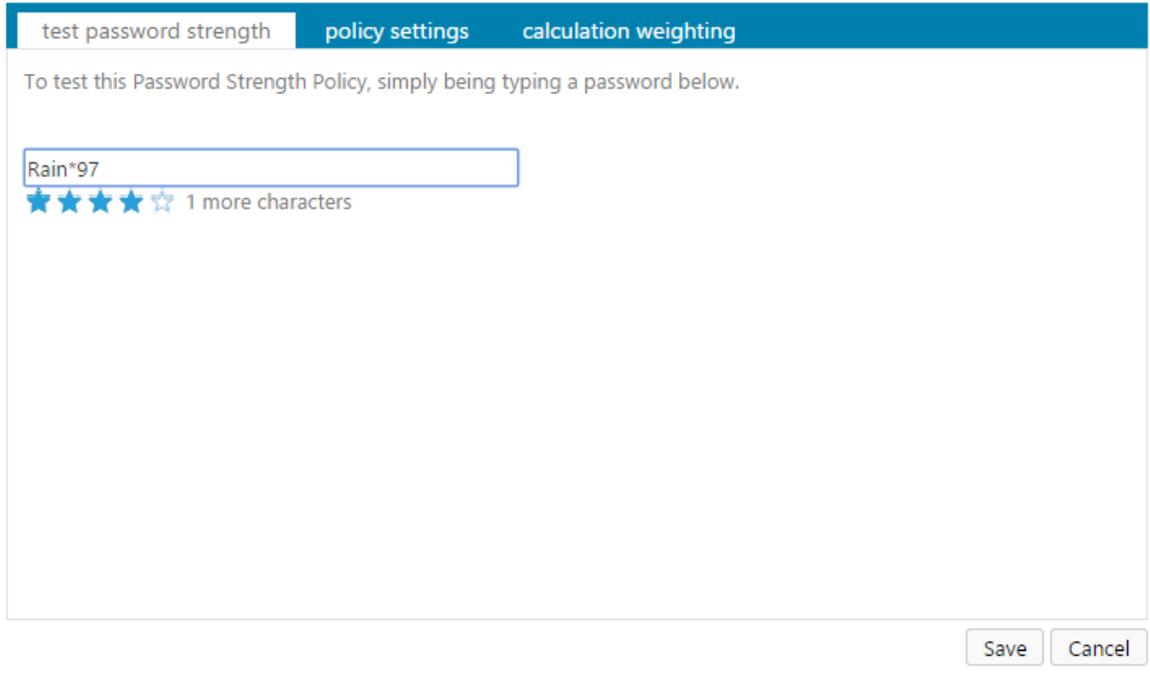
## Test Password Strength Tab

The Test Password Strength Tab allows you to test the policy settings you've specified on the other two tabs, and shows you a graphical representation of the strength of the password you type, based on the policy settings you've specified.

## Edit Password Strength Policy

Please specify your password strength policy settings in each of the appropriate tabs below, and click on the 'Save' button.

Note: the policy is not enforced when entering a password, instead it's used as a visual representation of password strength.



test password strength   policy settings   calculation weighting

To test this Password Strength Policy, simply being typing a password below.

Rain\*97

★★★★☆ 1 more characters

Save   Cancel

## 25 Privileged Account Credentials

Various processes in Passwordstate require a 'Privileged Account' to perform certain tasks i.e. Resetting Passwords, querying active directory, etc. This screen allows you to add those accounts to be used.

Once you have specified the details for one or more of the relevant Privileged Account Credentials, and applied permissions for users or security groups who are allowed to use these accounts, then they can be used for Password Resets and Discovery jobs, etc.

If you "link" the Privileged Account to a password stored in Passwordstate, when the password is updated in Passwordstate and Active Directory, it will also be automatically updated on this screen as well.

Privileged Account Credentials

Below are all the Privileged Account Credentials which can be used for Active Directory Account lookups, Host and Resource Discovery, and Password Reset Scripts.

In order for these credentials to be used for Host and Resource Discovery, and Password Reset Scripts, you must first apply permissions to them via the 'Actions' drop-down menu. Permissions can be applied to user's accounts or security groups.

Actions	Description	UserName	Linked For Update
▼	Cisco Enable Secret for Resetting Named Accounts	enable	✔
▼	Cisco Named Account for Resetting Enable Secret	tsand	✔
▼	Discover Windows Hosts and Resources	halox\passchanges_accnt	✘
▼	Read Active Directory Security Groups and User Accounts	halox\passchanges_accnt	✘
▼	SandDomain Accounts	msand@sanddomain.com	✘
▼	Update Active Directory Account Passwords	halox\msand	✘
▼	Update MySQL Account Passwords	msand	✔
▼	Update Oracle Account Passwords	sys	✘
▼	Update SQL Server Account Passwords	sa	✘

Add | Grid Layout Actions...

Privileged Account Credentials

Below are all the Privileged Account Credentials which can be used for Active Directory Account lookups, Host and Resource Discovery, and Password Reset Scripts.

In order for these credentials to be used for Host and Resource Discovery, and Password Reset Scripts, you must first apply permissions to them via the 'Actions' drop-down menu. Permissions can be applied to user's accounts or security groups.

Actions	Description	UserName
▼	Discover Windows Hosts and Resources	halox\msand
▼	View Permissions	Read Active Directory Security Groups and User Accounts
✘	Delete	Update Active Directory Account Passwords
▼	Update MySQL Account Passwords	msand
▼	Update Passwords for IIS Application Pools	
▼	Update Passwords for Scheduled Tasks	
▼	Update Passwords for Windows Services	devclick\msand
▼	Update SQL Server Account Passwords	sa
▼	Enable account Cisco	root
▼	SandDomain Accounts	passchanges_accnt@sanddomain.com

## ♂ Edit Privileged Account Details

Please update details as appropriate below for the Privileged Account Details.

**Note:** If no permissions are applied to this account, then it cannot be used for any Password Reset Scripts.

privileged account credentials

Please specify appropriate details below, then click on the Save Button.

Description \*

UserName \*   
For AD accounts in a trusted domain, use format of domain\userid.  
 For AD accounts in a non-trusted domain, use format of userid@domain.com

Active Directory Account  Yes  No

Password \*

Confirm Password \*

Link To Password \Windows Resources -> halox\msand

If you link this Privileged Account to a password record which is enabled for Password Resets, then it will be updated here once the Password Reset is complete.  
**Note:** Only passwords which have been enabled for Reset, plus match the UserName above, will be visible here.

## 26 Reporting

The Reporting feature allows you to run the following reports, which will be exported to csv files for further analysis if required:

- Audit Records (General) - exports a sorted list of all general audit records, not specific to Passwords or Password Lists. Please note this could be a large CSV file, so may take some time to generate
- Audit Records (Passwords) - exports a sorted list of all audit records specific to Passwords and Password Lists. Please note this could be a large CSV file, so may take some time to generate
- Password List Permissions - exports a sorted list of permissions for all Password Lists, and any permissions applied to individual passwords. **Note:** if the Title field is populated in this report, then it means the permissions have been applied to the individual password record
- Password Last Updated Report - show the date of when the value of password fields were last updated
- Password Reuse Report - exports a list of records where the same password have been used more than once.
- Aged Password Report - exports a list of each individual password record, showing the last time any activity occurred for each record (excludes Private Password Lists).
- Enumerated Password Permissions - exports a sorted list of permissions for every individual

password recorded in Passwordstate (excluding Private Password Lists). It will show permissions based on users, and will enumerate any Security Groups into User Account details

- Password Strength Compliance Report - exports a sorted list of all Password Lists, the strength of each password, and whether or not the Password Strength is compliant or not
- Security Administrators - exports a list of all Security Administrators in Passwordstate, what their roles are, and if access is provided via their User Account or Security Group
- Security Group Membership - exports a sorted list of Security Groups within Passwordstate, and their User Accounts membership
- User Accounts - exports a sorted list of User Accounts within Passwordstate
- 

 Note 1: No password values are exported in any of the reports on this screen.

 Note 2: Any one of these Reports can also be sent to you on the scheduled you specify via the Reports -> Scheduled Reports menu

## Reporting

To view details of a report, select it from the list below, and click on the 'Run Report' button to execute.

**Note:** These reports can also be scheduled from the 'Reports -> Scheduled Reports' menu - if you've been given access to this menu.

### Available Reports

- Audit Records - General
- Audit Records - Passwords
- Password List Permissions
- Password Last Updated Report
- Password Reuse Report
- Aged Password Report
- Enumerated Password Permissions
- Password Strength Compliance Report
- Security Administrators
- Security Group Membership
- User Accounts

### Report Description

Please select one of the available reports on the left, and click the 'Run Report' link below.

Run Report

## 27 Security Administrators

The 'Security Administrator' role in Passwordstate provides access to one or more features in the Administration area. If a user's account is not set up as a Security Administrator, the Administration menu will not be visible to them.

There are 15 different types of roles a Security Administrator account can be configured for, with each role providing access to various screens/features in the Administration area. The roles are:

 Note : To ensure there is a clear separation of elevated privilege responsibilities within

Passwordstate, you cannot modify any Security Administrator role settings for your own account - another Security Administrator will need to do this for you. As such, Click Studios recommends you have at least 2 Security Administrators assigned, otherwise you may need to use the Emergency Access account to make changes to this role if required.

<b>Role</b>	<b>Screen/Feature Access</b>
Active Directory Domains	Active Directory Domains
Auditing	Auditing & Auditing Graphs
Bad Passwords	Bad Passwords
Email Templates	Email Notification Groups & Email Templates
Emergency Access	Emergency Access
Export All Passwords	Export All Passwords
Licensing	License Information
Password Generator	Password Generator Policies
Password Lists	Images and Account Types, Password Folders, Password Lists & Password List Templates
Password Strength Policy	Password Strength Policies
Reporting	Reporting
Security Administrators	Security Administrators
Security Groups	Security Groups
System Settings	Authorized Web Servers, Backups and Upgrades, Browser Extension Settings, Encryption Keys, Error Console, Password Resets, Host Types & Operating Systems, Menu Access, Privileged Account Credentials and System Settings
User Accounts	User Accounts & User Account Policies

If you deselect one or more of the Security Administrator roles for a user, the corresponding Navigation Tree menu item will be disabled for the user.

- Administration Home
  - Active Directory Domains
  - Auditing
  - Auditing Graphs
  - Authorized Web Servers
  - Backups and Upgrades
  - Bad Passwords
  - Browser Extension Settings
  - Email Notification Groups
  - Email Templates
  - Emergency Access
  - Encryption Keys
  - Error Console
  - Export All Passwords
  - Host Types & Operating Systems
  - Images and Account Types
  - License Information
  - Menu Access
  - Password Folders
  - Password Generator Policies
  - Password Lists
  - Password List Templates
  - Password Resets
  - Password Strength Policies
  - Privileged Account Credentials
  - Reporting
  - Security Administrators
  - Security Groups
  - System Settings
  - User Accounts
  - User Account Policies

## 28 Security Groups

Security Groups allows you to manage either local security groups created within Passwordstate, or Active Directory security groups. These groups can then be used for applying permissions to Password Lists, or to give/deny access to various features.

On the Security Groups screen, you have the following features available:

### Add Local Security Group

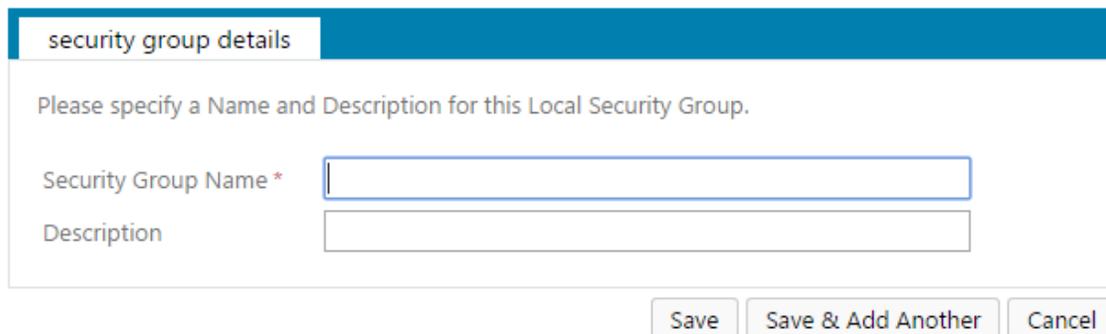
Allows you to add a "local" security group to Passwordstate, which you can then assign one or more user accounts to the security group.

 **Note:** Once you have added the local security group, you can assign user account membership by selecting the 'Manage Members' menu item from the appropriate Actions menu

#### Add New Local Security Group

To add a new Local Security Group to Passwordstate, please fill in the details below.

Note: Once the Security Group is created, you can then begin to assign members.



security group details

Please specify a Name and Description for this Local Security Group.

Security Group Name \*

Description

Save Save & Add Another Cancel

### Add Active Directory Security Group

To add an Active Directory Security Group, you simply need to search for the group you require, then click on the appropriate Save button.

 **Note :** When you add a security group, if there are any new user accounts found which do not already exist in Passwordstate (on the [User Accounts](#) screen), there is an option on the screen Administration -> [System Settings](#) -> [Active Directory Options Tab](#) which allows you to also automatically add these user accounts.

## Add Active Directory Security Group

To add a new Active Directory Security Group to Passwordstate, please use the search feature below.

security group details

Please use the search feature below to search for an Active Directory Security Group.

Security Group Name \*  

AD Domain \*

LDAP Filter :   
You can query a specify OU by modifying the LDAP QueryString above if needed

Description

Security Groups Search Results 

 CoreAdmins

Status: Records found

## Debug Security Group Membership

In the event you are having some issue synchronizing the membership of an Active Directory Security Group, the 'Debug Security Group Membership' screen allows you to query the members of the security groups, and provide some additional debug information which may be useful for determine the cause of the issue.

### Active Directory Security Groups Debug Screen

This page will allow you test querying the membership of An Active Directory Security Group, and provide additional debug information during the process.

To use this feature you will need to first search for the appropriate Security Group. When you click on a Security Group in the search results, it will attempt to enumerate all the members for you.

security group details

Please use the search feature below to search for an Active Directory Security Group.

Security Group Name \*

AD Domain \*

LDAP Filter :

You can query a specify OU by modifying the LDAP QueryString above if needed

Security Groups Search Results	Debug Information
<div style="background-color: #0070c0; color: white; padding: 2px; margin-bottom: 5px;">CoreAdmins</div>	<pre style="font-family: monospace; font-size: small;"> Debug 1: ctx = New PrincipalContext(ContextType.Domain, FQDN, ADUserName, Password) Debug 2: FQDN = halox.net, ObjectSID = S-1-5-21-1148196639-3763766589-299460394-2689 Debug 3: For Each p As Principal In GroupPrincipal.GetMembers() Debug 4: If p.StructuralObjectClass &lt;&gt; 'group' Then Debug 5: p.DistinguishedName = CN=Sam Violantes,CN=Users,DC=halox,DC=net, p.StructuralObjectClass = user Debug 6: p.Context = System.DirectoryServices.AccountManagement.PrincipalContext Debug 7: Dim user As UserPrincipal = UserPrincipal.FindByIdentity(p.Context, IdentityType.DistinguishedName, p.DistinguishedName) Debug 8: Dim strUserID As String = LCase(GetUsersNetBIOSDomain(FQDN) &amp; '\' &amp; userSamAccountName) </pre>

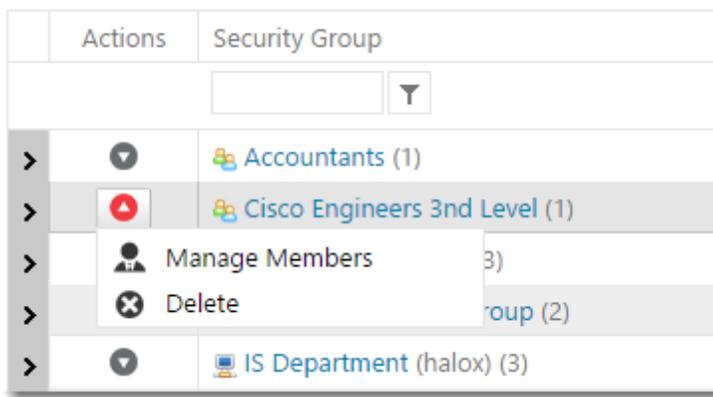
Status: Records found

## Local Security Group Actions Menu

Once you have created a Local Security Group, the 'Actions' drop-down menu has two features you can use:

- **Manage Members** - allows you to add or remove members from the security group
- **Delete** - delete the security group from Passwordstate. This does not delete any user accounts, only the security group itself

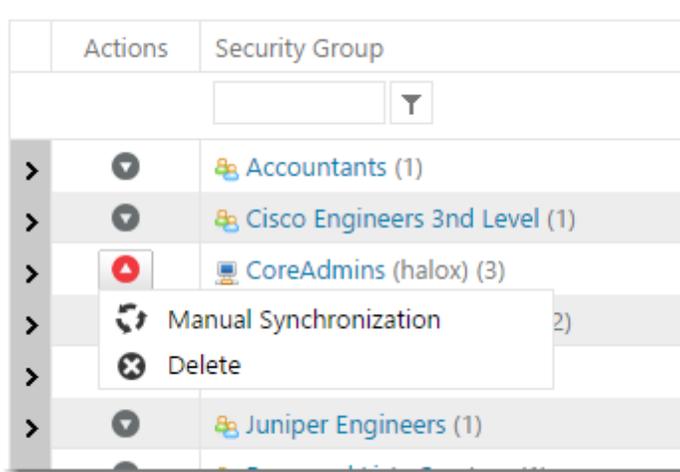
**Note:** If the Security Group has been used to apply permissions anywhere within Passwordstate, removing members from the security group, or deleting the Security Group itself, will remove one or more user's access



## Active Directory Security Group Actions Menu

Once you have add a new Active Directory Security Group, the 'Actions' drop-down menu has two features you can use:

- Manual Synchronization - synchronization membership of an Active Directory Security Group can be done in one of 3 ways:
  - When you first add an AD Security Group to Passwordstate
  - The Passwordstate Windows Service can perform the synchronization on the schedule you have specified on the screen Administration -> [System Settings](#) -> [Active Directory Options Tab](#)
  - Or by clicking the 'Manual Synchronization' menu item
- Delete - delete the security group from Passwordstate. This does not delete any user accounts in Passwordstate, and does not touch your Active Directory environment in any way



## Clone Security Group Permissions

It's possible to clone the permissions from one Security Group to another using the 'Clone

Permissions' feature.

 Note 1: When cloning occurs, the Destination Security Group's permissions are first removed – otherwise duplication would occur

 Note 2: Security Group Memberships will not be cloned with this process, as you need to manage these memberships yourself - either manually for Local Security Groups, or by letting the AD synchronization work for AD groups.

During the cloning process, the following types of permissions will be cloned:

- Any memberships to Email Notification Groups
- Any of the 'Features' permissions for what menus the user is allowed access to at the bottom of the screen
- Any permissions to Password Lists (auditing records are added)
- Any Password Permissions (auditing records are added)
- Any permissions to Password Lists Templates (auditing records are added)
- Any Security Admin Roles (auditing records are added)
- Any User Account Policy permissions

## 👤 Clone Security Group Permissions

To clone permissions for a Security Group, you need to select the Source and Destination Groups below, then click on the 'Clone' button.

**Please Note:** Please refer to the Security Administrators' manual for what processing occurs when you clone a Security Groups's permissions (**Important**)

The screenshot shows a web interface titled "clone permissions". It features two side-by-side lists of security groups. The left list is labeled "Source Security Groups" and the right list is labeled "Destination Security Groups". Both lists contain the same set of groups: Accountants, Cisco Engineers 3rd Level, CoreAdmins (halox), Education Support Group, IS Department (halox), Juniper Engineers, Password Lists Creators, Passwordstate-Auditing Security Group (halox), Passwordstate-Export-All-Password Security Group (halox), Sec.passwd.customers-view, Security Administrators, SecurityGroup1 (halox), SecurityGroup2 (halox), Sys Admins (sanddomain), and Telco Team. Each group is preceded by a small icon. Below the lists, there is a "Status:" label and two buttons: "Clone Permissions" and "Cancel".

## Debug Active Directory User Account and Security Groups Synchronization Process

By clicking on the 'Debug AD Sync Data' button, it allows you to turn on some debug capturing when the Passwordstate Windows Service performs the Active Directory User Account and Security Group synchronization process.

The screenshot shows a web interface titled "Debug AD Sync Data". It contains a paragraph of text explaining that enabling the debug option will add debug information to a grid below, which is performed by the Passwordstate Windows Service. Below this text, there is a radio button group for "Enable Debugging:" with "Yes" and "No" options. The "No" option is selected and circled in red. Below the radio buttons is a search box labeled "Search Debug Data" with a "Search" button. Underneath the search box is a table with columns for "Date", "Debug Information", and "Event Type". The table is currently empty, with the text "No records to display." below it. At the bottom of the interface, there are several action buttons: "Return", "Refresh Grid", "Export", "Purge Debug Data", and a "Grid Layout Actions..." dropdown menu.

## 29 System Settings

System Settings are used to specify any number of system wide settings in Passwordstate, which can affect the majority of users within the system.

<a href="#">Active Directory Options Tab</a>	Various settings for synchronizing Active Directory user accounts and security groups with Active Directory
<a href="#">Allowed IP Ranges Tab</a>	Specify which IP Addresses or IP Address Ranges are allowed to access the Passwordstate web site or API
<a href="#">API Keys Tab</a>	Create various API Keys for making calls to the Passwordstate API
<a href="#">Authentication Options Tab</a>	Various options and settings for authenticating to the Passwordstate web site
<a href="#">Branding Tab</a>	Specify your own Logos and Page Titles to use on various screens and dialogs
<a href="#">Check for Updates Tab</a>	Specify how frequently Passwordstate should check for new versions
<a href="#">Email Alerts &amp; Options Tab</a>	Email Server settings, and multiple options for various email notifications
<a href="#">Folder Options</a>	Specify various settings for Folders within the main Navigation Tree.
<a href="#">High Availability Options Tab</a>	Specify how frequently the High Availability instance of Passwordstate should check for new/update Custom Images and Logos, and write these to disk
<a href="#">Hosts Tab</a>	The Hosts tab has a few options for showing or hiding all the Hosts users have access to, on the Password Home and Remote Session Launcher pages
<a href="#">Miscellaneous Tab</a>	Various settings which don't fall into any other of the 'Tab' categories
<a href="#">Mobile Access Options</a>	Specify various system wide settings for the Mobile Access client
<a href="#">Password List Options Tab</a>	Settings which are specific to Password Lists
<a href="#">Password Options Tab</a>	Settings which are specific to individual password records
<a href="#">Password Reset Options</a>	Specify various settings when updating passwords in Active Directory, and specify who is allowed to enable the 'Password Reset' option on Password Lists
<a href="#">Proxy &amp; Syslog Servers Tab</a>	Specify proxy settings or syslog settings for Passwordstate to use
<a href="#">Usage Tracking Tab</a>	Allows you to specify your own JavaScript code to be inserted into the main /default.aspx page
<a href="#">User Acceptance Policy Tab</a>	Specify a popup 'User Acceptance Policy' which users must read when they access the Passwordstate web site

### 29.1 Active Directory Options Tab

The Active Directory Options tab allows you to specify an account to interact with Active Directory, and various options for User Accounts & Security Groups.

## Passwordstate AD User Account and Security Group Membership Options

---

The 'Passwordstate User Account and Security Group Membership Options' settings allows you to specify various options for synchronizing User Account enabled/disable status, and security group memberships within Passwordstate.

### **If a User Account is found within a Security Group which hasn't already been added to Passwordstate, would you like to automatically add the User Account;**

When the Passwordstate Windows Service synchronizes the membership of any Security Groups you've added on the [Security Groups](#) screen, it's possible there will be user accounts in the Active Directory security group which have not yet been added to the [User Accounts](#) screen. If this is the case, you can use this option to automatically add the accounts to Passwordstate, or simply ignore the account.

 **Note:** If you reach the maximum number of Client Access License as recorded on the [License Information](#) screen, the user accounts will not be added to Passwordstate.

### **Synchronize the enabled/disabled status of Active Directory user accounts with the user accounts in Passwordstate;**

Using this option, if the enabled/disabled status of a user account in Active Directory is changed, you can also synchronize that change to the account stored in Passwordstate.

### **When an account in Active Directory is deleted, perform the following in Passwordstate:**

If a User Account in Active Directory is deleted, you can choose either you want to delete it in Passwordstate, disabled the account, or simply do nothing.

### **When a user is removed from a Security Group, and that user no longer belongs to any Security Groups, perform the following in Passwordstate:**

If a user no longer belongs to any Active Directory Security Groups, which have been added to Passwordstate, you can choose to disable, delete, or do nothing with their account.

 **Note:** For the two options above, if you choose to delete the user account in Passwordstate, all access for the user's account will be removed, and any Private Password Lists they may have had will be deleted.

### **Synchronize Security Group Memberships, and User Account status at:**

Synchronizing of Active Directory security group memberships, and the status of user accounts (either enabled, disabled or deleted status), can be done either once a day or more frequently if required, by choosing the appropriate option here.

### **When synchronizing Security Groups, or querying the status of an AD User Account, pause for (x) seconds between consecutive calls to Active Directory:**

So the Passwordstate Windows Service doesn't perform too many consecutive queries to Active Directory too quickly, you can add a pause for this.

 **Performance Tip:** If you have many Active Directory User Accounts added to Passwordstate, the synchronization of the features above will perform significantly better if these user accounts belong to one or more Security Groups, and these Security Groups have also been added to Passwordstate via the page [Security Groups](#). The reason for this performance improvement is because all the users can be enumerated with one call to Active Directory for the Security Group, instead of making separate calls for every single account. If you have many AD users added to Passwordstate (i.e. 200+), it is recommended you add one or more Security Groups even if you don't use them to apply permissions anywhere.

## 29.2 Allowed IP Ranges Tab

The Allowed IP Ranges Tab allows you to specify a range of IP Addresses where clients are allowed to access the Passwordstate web site, make calls to the Passwordstate API, or access to the Emergency Access login page.

Specifying IP Ranges can be done in the following format:

- 192.168.1.\* (all addresses in the range of 192.168.1.0 to 192.168.0.255)
- 192.168.\*.\* (all addresses in the range of 192.168.0.0 to 192.168.255.255)
- 192.\*.\*.\* (all addresses in the range of 192.0.0.0 to 192.255.255.255)
- 192.168.1.1-192.168.2.50 (just the addresses in the range of 192.168.1.1 to 192.168.2.50)
- 192.168.1.50 (just a single IP Address)

 **Note 1:** Regardless of the settings you specify here, you will always be able to access Passwordstate if logged into your web server directly, or via the Emergency Access account

 **Note 2:** If making an API call from an IP Address which is not authorized, then API will return a HTTP Status Code of 403 - Forbidden

You can set the Allowed IP Ranges separately for each of the 3 features (web site, API and Emergency Access Login), and the features below are also possible for further restricting access to the Passwordstate web site.

### If the Passwordstate web site is accessed outside of one of the IP Ranges listed above, force the user to authenticate using the following method

---

If you would like to choose a different authentication method when your users are outside of your internal network, then you can choose the option from here.

By default, access from IP Addresses which aren't listed as 'Allowed' will be blocked. By selecting an authentication option instead, you can enforce a different authentication mechanism. This is a



 System Settings

To modify the system settings, please make changes within the appropriate tabs below, then click on the 'Save' button.

active directory options
allowed ip ranges
api keys
authentication options
branding
check for updates
email alerts & options
high availability options
hosts
miscellaneous
mobile access options
password list options
password options
password reset options
proxy & syslog servers
usage tracking
user acceptance policy

**API Key**

By creating an API Key below, you can allow 3rd party programs or your own scripts full access to certain system wide queries via the Passwordstate API, so it is important this key is not given to unauthorized users.

API Key

**Warning:** Resetting the API Key will break existing applications using it.

---

**API Settings and Permissions**

**Prevent API Keys being included in the QueryString of the API Method call, instead of in the Header Request:**  
(Note: Specifying the API Keys in the QueryString is less secure than the Header Request)

No  Yes

By default, users who are 'Administrators' of Password Lists can create and API key for the Password List, and configure settings as appropriate. If you wish to control who is allowed to do this, please click on the 'Set Permissions' button below.

---

**Hosts API Key**

By creating a Hosts API Key below, you can create/delete Hosts records via the API.

API Key

**Warning:** Resetting the API Key will break existing applications using it.

---

**Password Generator API Key**

By creating a Password Generator API Key below, you can generate random passwords via the API. A separate API Key is used for this purpose, so the API Key above which allows full access for making changes to password records, does not need to be given out just for the purpose of generating random passwords.

API Key

**Warning:** Resetting the API Key will break existing applications using it. Clearing this key will also stop the Password Generator feature in the top toolbar of Passwordstate from working.

## 29.4 Authentication Options Tab

The Authentication Options Tab provides various settings for when your users first authenticate to the Passwordstate web site.

 **Note 1:** Options will be different on this screen, depending on if you have installed the Active Directory integrated version of Passwordstate, or the Forms-Based Authentication version.

 **Note 2:** If in the event you lock yourself out of authenticating against the Passwordstate web site for any reason, you can always use the [Emergency Access](#) account to authenticate.

### Authentication Option

There are multiple different authentication options available for when your users first access the Passwordstate web site, and they are:

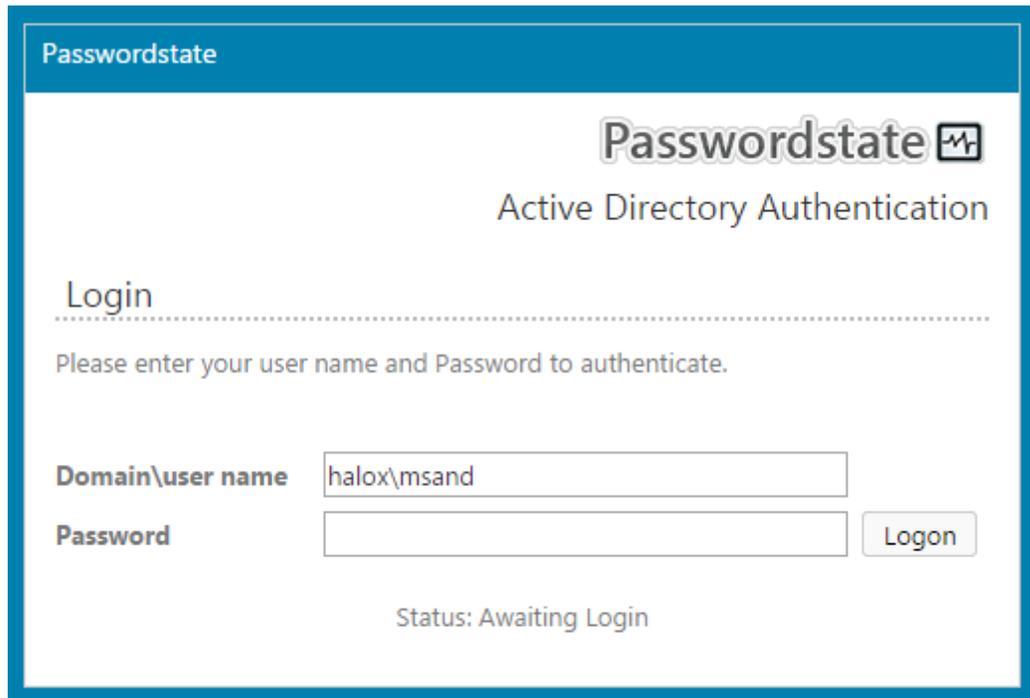
#### Passthrough AD Authentication

If DNS, your browser, and the site in IIS is configured correctly, your browser should not prompt you for your account details when using this authentication method, instead it should pass your

account details to the Passwordstate web site in IIS, and IIS ensures your account exists in Active Directory.

### Manual AD Authentication

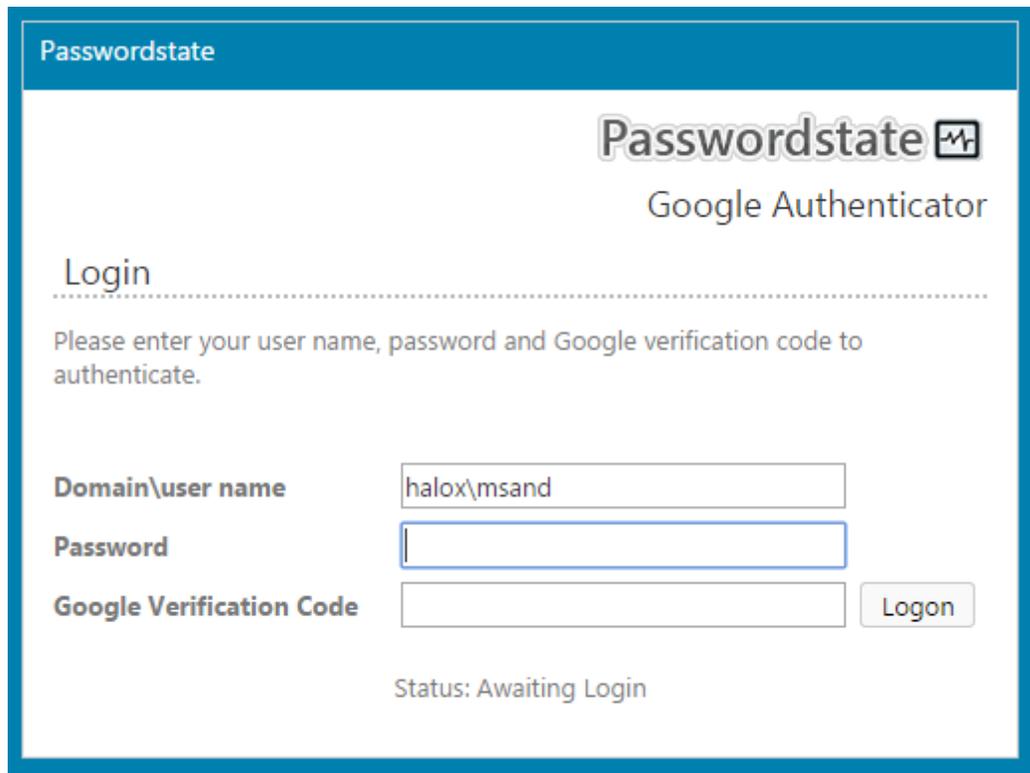
Provides a dialog for users to manually specify their AD domain credentials.



The screenshot shows a web-based login dialog for Passwordstate. The title bar is blue and contains the text "Passwordstate". The main content area has a white background with the "Passwordstate" logo and the text "Active Directory Authentication". Below this is a "Login" section with a dotted line separator. A message reads: "Please enter your user name and Password to authenticate." There are two input fields: "Domain\user name" with the value "halox\msand" and "Password" which is empty. A "Logon" button is positioned to the right of the password field. At the bottom, the status "Status: Awaiting Login" is displayed.

### Manual AD and Google Authenticator

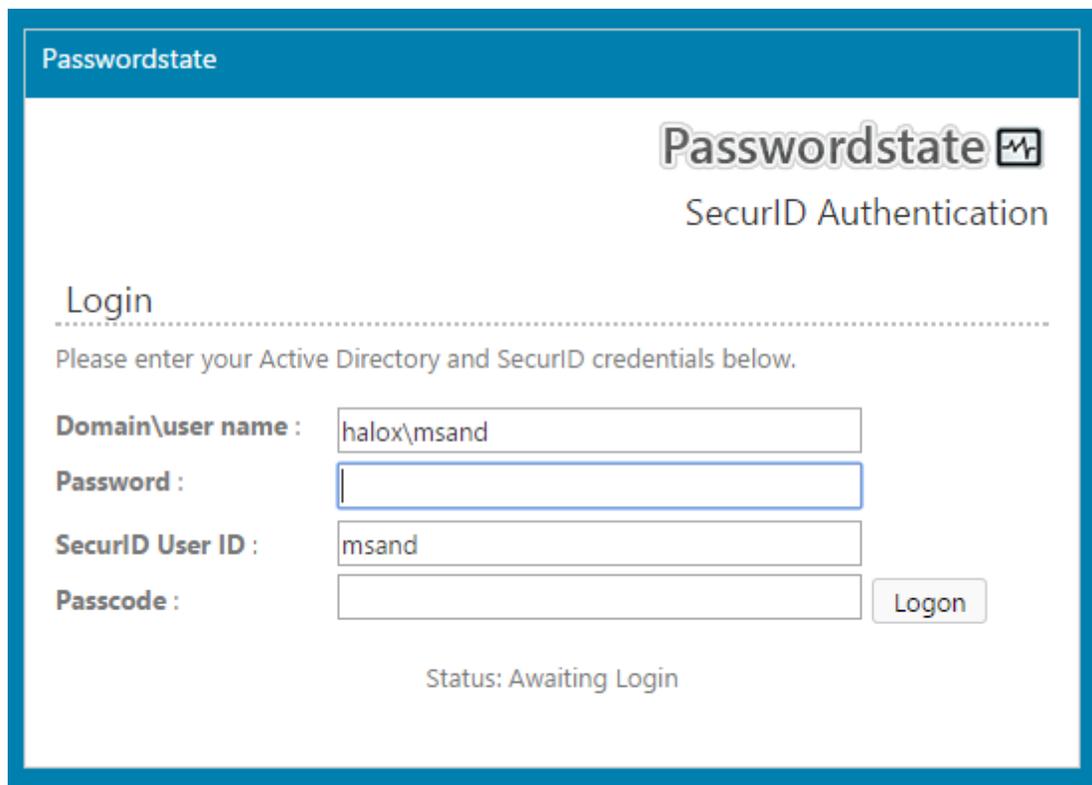
Provides a dialog for users to manually specify their AD domain credentials, and a Google Verification Code. To use this authentication method, the user must create a Google Authenticator Secret Key on the Preferences screen, or Security Administrators can do it for them on the [User Accounts](#) screen.



The screenshot shows a web interface for Passwordstate Google Authenticator. At the top left, the word "Passwordstate" is written in white on a blue background. To the right, the "Passwordstate" logo is displayed above the text "Google Authenticator". Below this, the word "Login" is centered, followed by a horizontal dotted line. A message reads: "Please enter your user name, password and Google verification code to authenticate." There are three input fields: "Domain\user name" containing "halox\msand", "Password" (empty), and "Google Verification Code" (empty). A "Logon" button is positioned to the right of the code field. At the bottom, the status "Status: Awaiting Login" is shown.

#### Manual AD and RSA SecurID Authentication

Provides a dialog for users to manually specify their AD domain credentials, and a SecurID Passcode. To use this authentication method, the user must have a valid SecurID account and token.

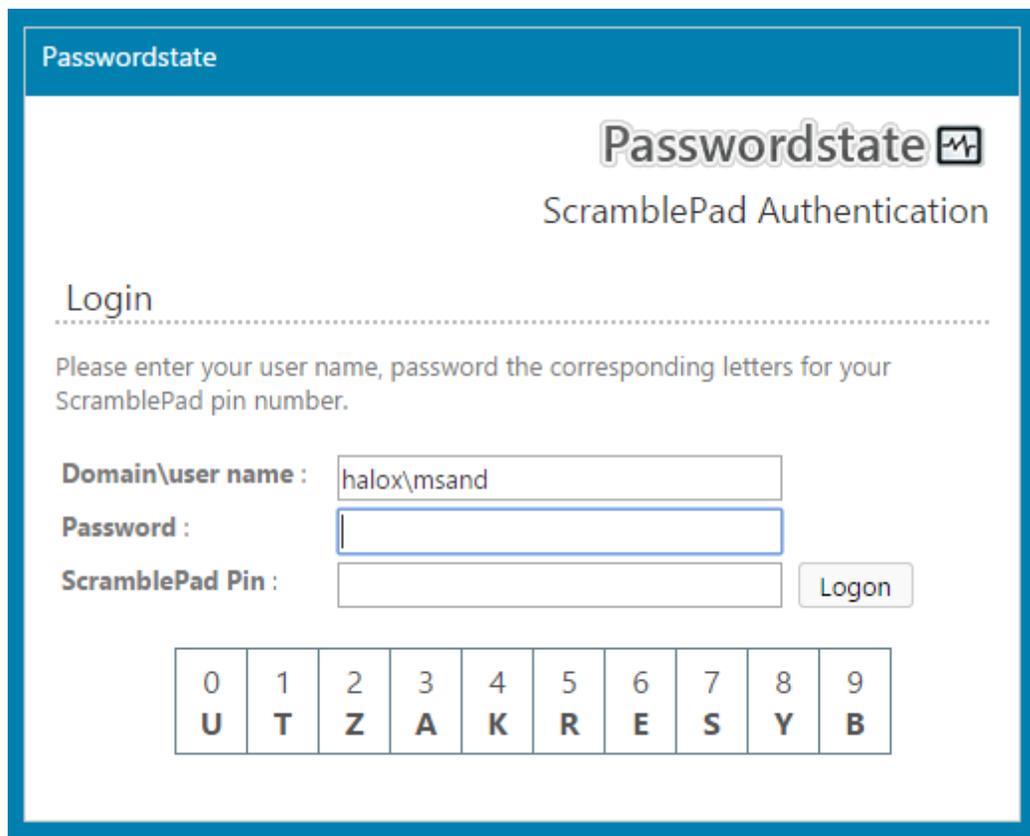


The screenshot shows a login dialog box titled "Passwordstate" with a sub-header "SecurID Authentication". Below the header, the word "Login" is underlined. A message reads: "Please enter your Active Directory and SecurID credentials below." There are four input fields: "Domain\user name" containing "halox\msand", "Password" (empty), "SecurID User ID" containing "msand", and "Passcode" (empty). A "Logon" button is located to the right of the Passcode field. At the bottom center, the status "Status: Awaiting Login" is displayed.

#### Manual AD and ScramblePad Authentication

Provides a dialog for users to manually specify their AD domain credentials, and a ScramblePad Pin. To use this authentication method, the user must specify their ScramblePad Pin number on the Preferences screen, or Security Administrators can do it for them on the [User Accounts](#) screen.

In the screenshot below, if the user's Pin Number was **0123**, then they would need to enter **ejgx** to authenticate correctly - the letters are rearranged every time the screen is accessed.



The screenshot shows the Passwordstate ScramblePad Authentication login interface. At the top, there is a blue header with the text "Passwordstate". Below this, the "Passwordstate" logo and "ScramblePad Authentication" are displayed. The "Login" section is separated by a dotted line. A message instructs the user to enter their user name, password, and the corresponding letters for their ScramblePad pin number. There are three input fields: "Domain\user name :" with the value "halox\msand", "Password :", and "ScramblePad Pin :". A "Logon" button is located to the right of the ScramblePad Pin field. Below the input fields is a ScramblePad grid consisting of two rows of ten boxes each. The top row contains the digits 0 through 9. The bottom row contains the letters U, T, Z, A, K, R, E, S, Y, B.

0	1	2	3	4	5	6	7	8	9
U	T	Z	A	K	R	E	S	Y	B

### Manual AD and Email Temporary Pin Code

Provides an authentication dialog for users to manually specify their own AD credentials, and also a Temporary Pin Code. User's must specify an email address in their 'Preferences' area as to where they want the Temporary Pin Code to be emailed to, and Security Administrators cannot set this email address for them.

The length of the Pin Code, and the time in which it expires, can also be set on this screen.

Passwordstate

Passwordstate 

Temporary Pin Code Authentication

Login

To authenticate with your Temporary Pin Code, please check your registered email address and enter the Pin Code below.

Domain\user name :

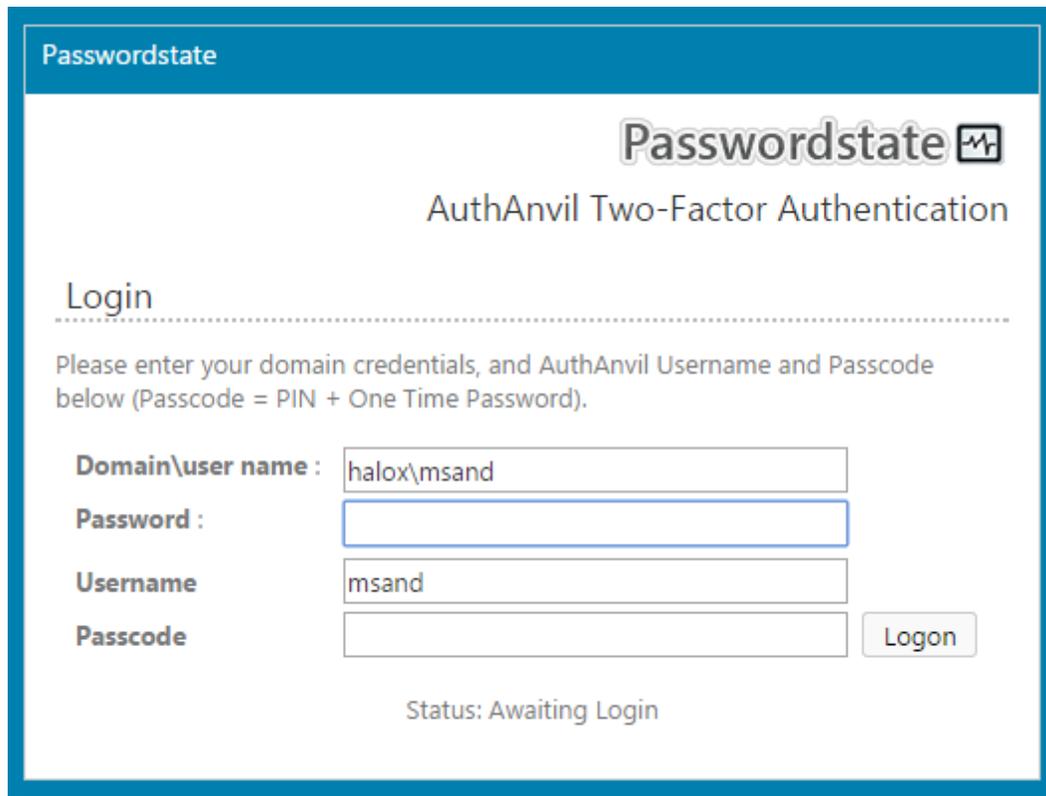
Password :

Pin Code

You have **3** minutes before the temporary Pin Code expires, at which time you will be logged out.

#### Manual AD and AuthAnvil Authentication

Provides a dialog where you can enter both your Active Directory domain credentials, and your AuthAnvil Username and Passcode to log in using two-factor authentication. User's must have specified their AuthAnvil Username on the Preferences screen in order to authenticate.



The screenshot shows a login interface for Passwordstate. At the top, there is a blue header with the text "Passwordstate". Below this, the "Passwordstate" logo is displayed in a large, stylized font, followed by the text "AuthAnvil Two-Factor Authentication". Underneath, the word "Login" is centered, with a dotted line below it. A message reads: "Please enter your domain credentials, and AuthAnvil Username and Passcode below (Passcode = PIN + One Time Password)". The form contains four input fields: "Domain\user name :" with the value "halox\msand", "Password :" (empty), "Username" with the value "msand", and "Passcode" (empty). A "Logon" button is positioned to the right of the Passcode field. At the bottom center, the status "Status: Awaiting Login" is displayed.

### Manual AD and Duo Push Authentication

Provides a dialog where you can enter both your Active Directory domain credentials, and your Duo Push Username to log in using two-factor authentication. User's must have specified their Duo Push Username on the Preferences screen in order to authenticate. You can also choose which device to send the Push Notification to.

🚩 Please refer to the following document as to how to configure Duo Push Authentication in the Duo Portal and Passwordstate - [Duo Auth API Configuration](#)

Passwordstate

Passwordstate 

Duo Push Authentication

### Login

Please enter your Domain Credentials and Duo Username below and press the 'Send Push' button to start the authentication process.

**Domain\user name**

**Password**

**Duo Username**

**Send to Device**

Leave blank for default device

Status: Awaiting Login

#### Manual AD and SafeNet Authentication

Provides a dialog where you can enter both your Active Directory domain credentials, and your SafeNet Username to log in using two-factor authentication. User's must have specified their SafeNet Username on the Preferences screen in order to authenticate.

**Passwordstate** 

SafeNet Two-Factor Authentication

**Login**

Please enter your domain credentials, and SafeNet Username and Passcode below.

**Domain\user name :**

**Password :**

**Username**

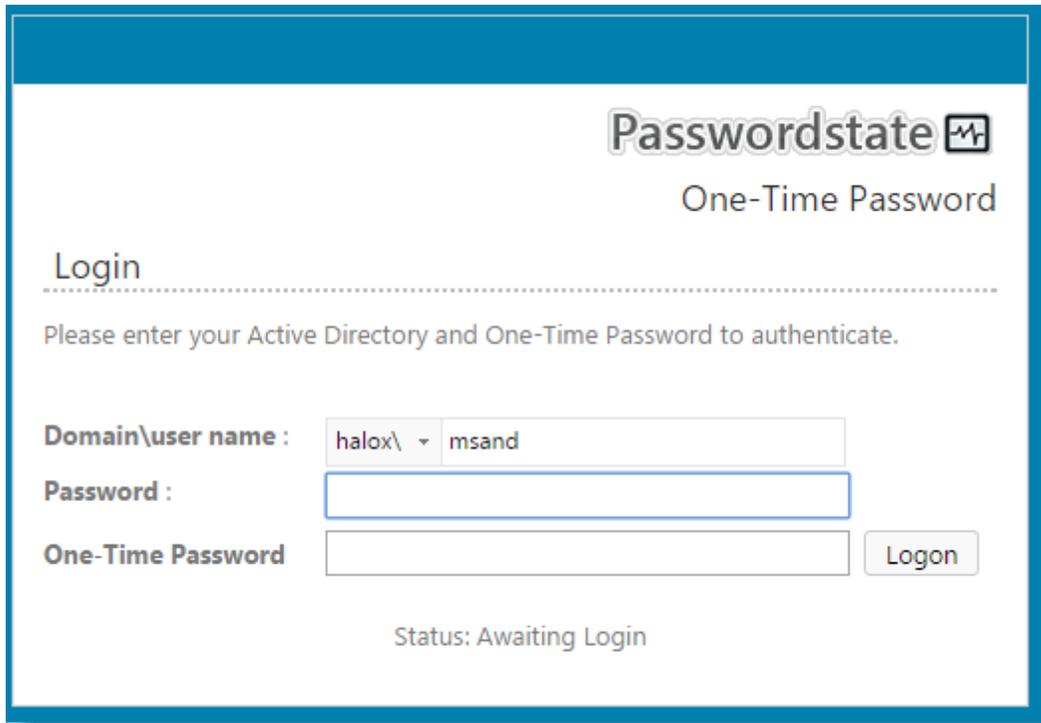
**Passcode**

Status: Awaiting Login

#### Manual AD and One-Time Password

Provides a dialog where you can enter both your Active Directory domain credentials, and a One-Time Password from your hardware or software token.

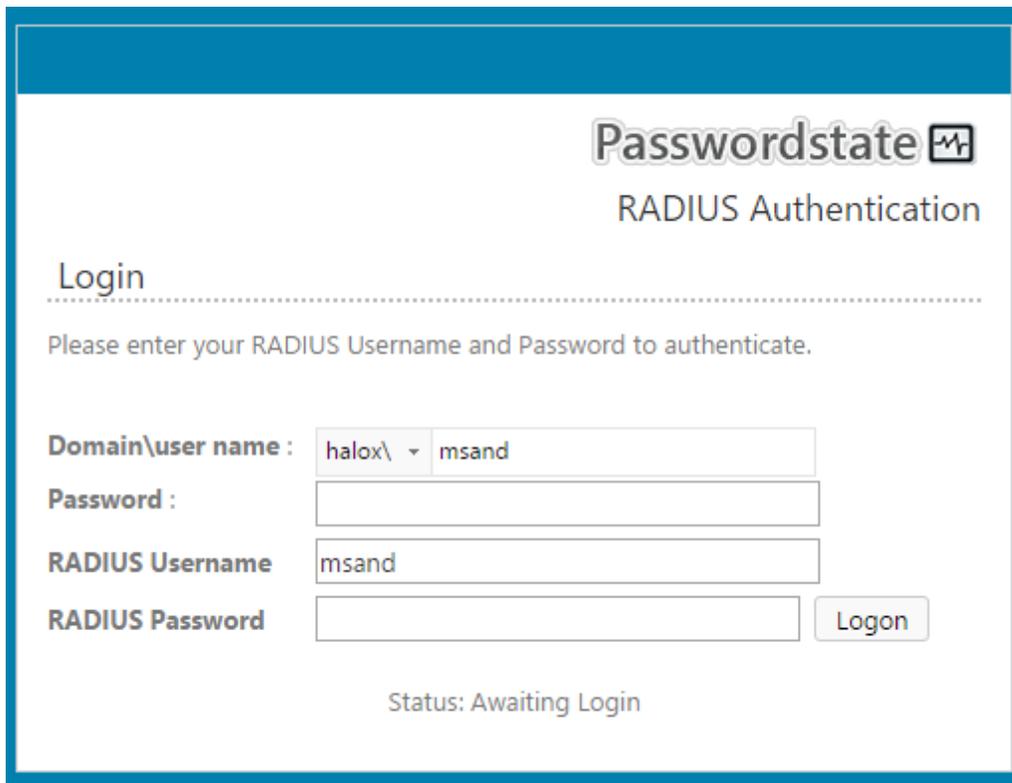
One-Time Password authentication supports the TOTP and HOTP algorithms - TOTP being time-based, and HOTP being counter-based. Both hardware and software tokens can be used for this authentication method. If you enable this authentication option, and users have not configured their preferences for their token, they will be prompted to specify their own settings the next time they access Passwordstate.



The screenshot shows the Passwordstate One-Time Password login page. At the top right, the logo "Passwordstate" is displayed next to a small icon of a person with a pulse line. Below the logo, the text "One-Time Password" is centered. The main heading "Login" is followed by a horizontal dashed line. Below this, a message reads: "Please enter your Active Directory and One-Time Password to authenticate." The login form consists of three input fields: "Domain\user name :" with a dropdown menu showing "halox\" and a text box containing "msand"; "Password :" with an empty text box; and "One-Time Password" with an empty text box. A "Logon" button is positioned to the right of the One-Time Password field. Below the form, the status "Status: Awaiting Login" is displayed.

#### Manual AD and RADIUS Authentication

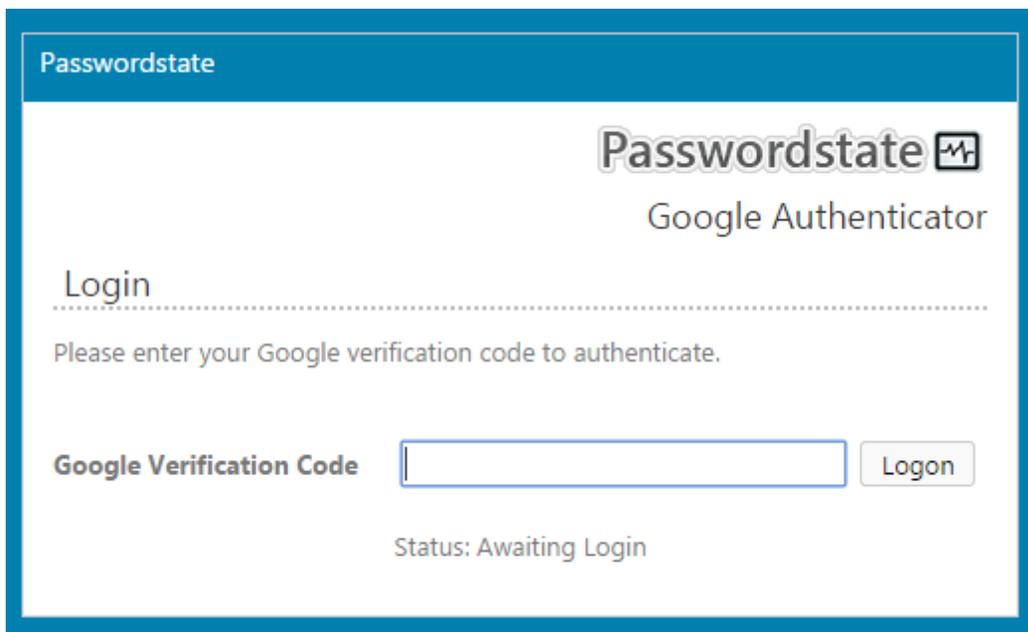
Passwordstate can authenticate to a RADIUS server, and your RADIUS server can be configured for specific authentication methods for different accounts. Using the Manual AD And RADIUS option, you must authenticate to both AD and the RADIUS server.



The screenshot shows the Passwordstate RADIUS Authentication login interface. At the top right, the Passwordstate logo and 'RADIUS Authentication' text are displayed. Below this, the word 'Login' is centered, followed by a dotted line and the instruction: 'Please enter your RADIUS Username and Password to authenticate.' The form contains four input fields: 'Domain\user name' with a dropdown menu showing 'halox\' and 'msand', 'Password', 'RADIUS Username' with 'msand' entered, and 'RADIUS Password'. A 'Logon' button is positioned to the right of the RADIUS Password field. At the bottom center, the status 'Status: Awaiting Login' is shown.

### Google Authenticator

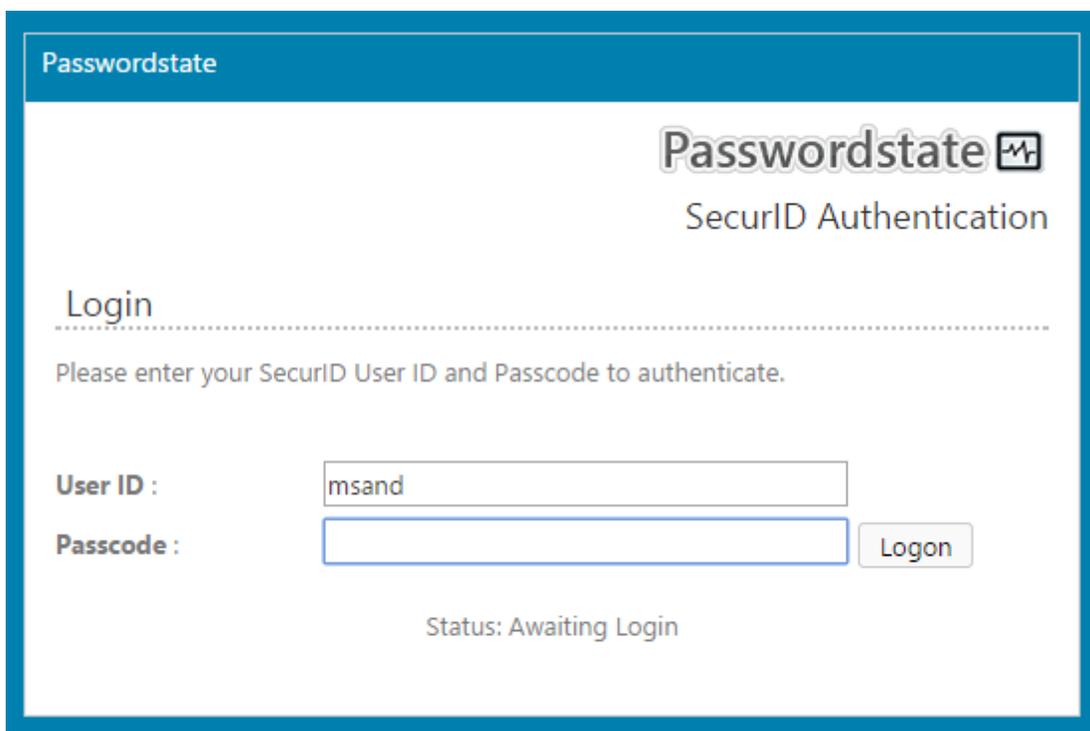
Provides a dialog for users to manually specify their Google Verification Code - this works in conjunction with Passthrough AD Authentication. To use this authentication method, the user must create a Google Authenticator Secret Key on the Preferences screen, or Security Administrators can do it for them on the [User Accounts](#) screen.



The screenshot shows a web interface for Passwordstate Google Authenticator. At the top, there is a blue header with the text "Passwordstate". Below the header, the "Passwordstate" logo and "Google Authenticator" text are displayed. A "Login" section is separated by a dotted line. Below this, a message reads "Please enter your Google verification code to authenticate." There is a text input field labeled "Google Verification Code" and a "Logon" button. At the bottom, the status "Status: Awaiting Login" is shown.

#### RSA SecurID Authentication

Provides a dialog for users to manually specify their SecurID Passcode - this works in conjunction with Passthrough AD Authentication. To use this authentication method, the user must have a valid SecurID account and token.

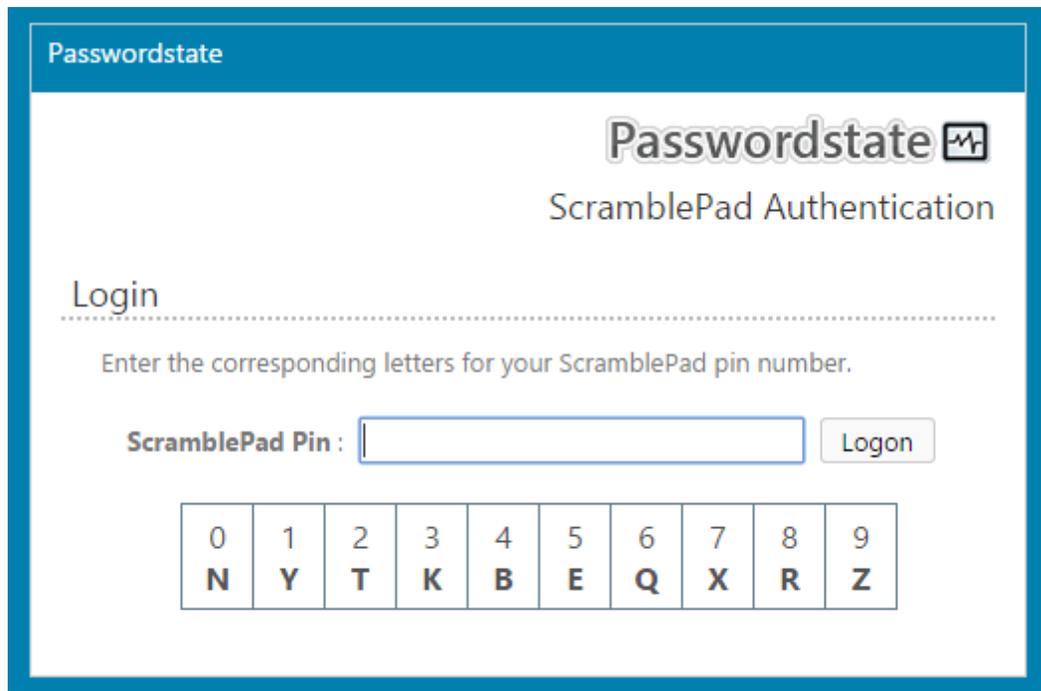


The screenshot shows a web interface for Passwordstate SecurID Authentication. At the top, there is a blue header with the text "Passwordstate". Below the header, the "Passwordstate" logo and "SecurID Authentication" text are displayed. A "Login" section is separated by a dotted line. Below this, a message reads "Please enter your SecurID User ID and Passcode to authenticate." There are two text input fields: "User ID" with the value "msand" and "Passcode". A "Logon" button is located to the right of the "Passcode" field. At the bottom, the status "Status: Awaiting Login" is shown.

#### ScramblePad Authentication

Provides a dialog for users to manually specify their ScramblePad Pin code - this works in conjunction with Passthrough AD Authentication. To use this authentication method, the user must specify their ScramblePad Pin number on the Preferences screen, or Security Administrators can do it for them on the [User Accounts](#) screen.

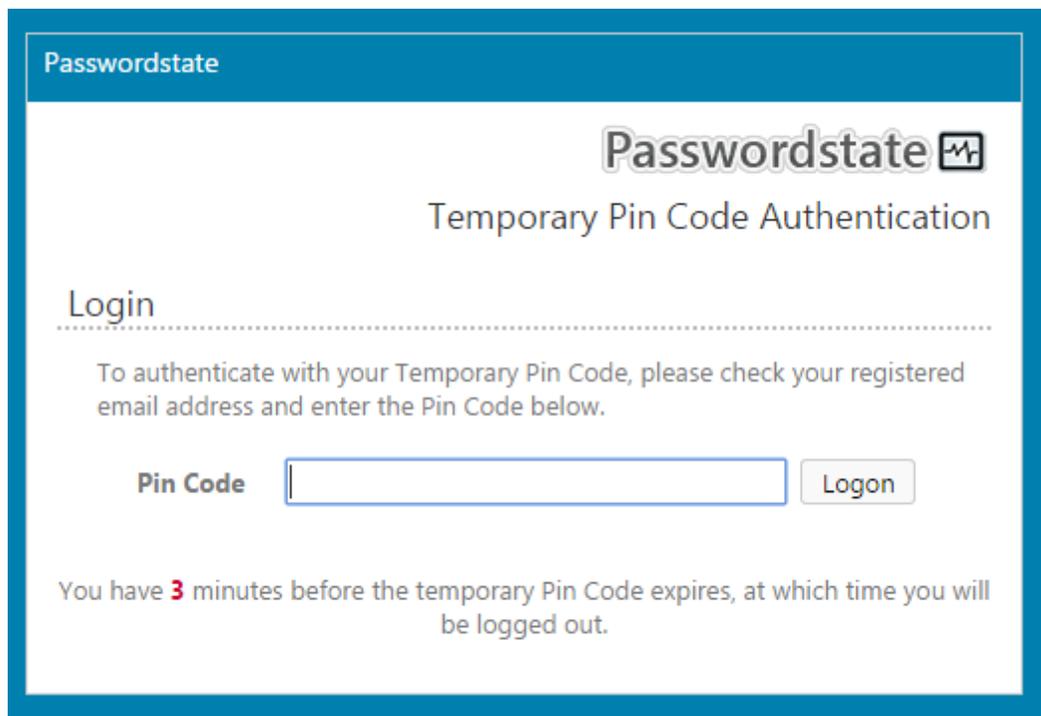
In the screenshot below, if the user's Pin Number was **0123**, then they would need to enter **rjdu** to authenticate correctly - the letters are rearranged every time the screen is accessed.



0 1 2 3 4 5 6 7 8 9  
N Y T K B E Q X R Z

#### Email Temporary Pin Code

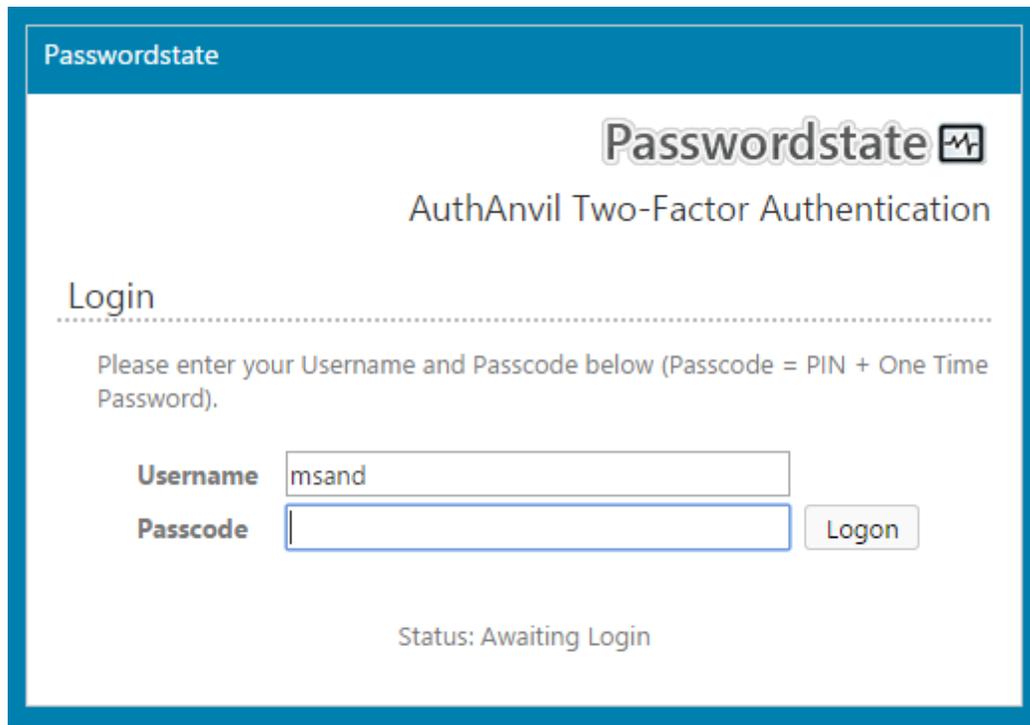
Provides an authentication dialog for users to enter a Temporary Pin Code. User's must specify an email address in their 'Preferences' area as to where they want the Temporary Pin Code to be emailed to, and Security Administrators cannot set this email address for them.



The screenshot shows a web-based authentication dialog for Passwordstate. It has a blue header bar with the text "Passwordstate". Below the header, the "Passwordstate" logo is displayed in a large, light blue font, followed by the text "Temporary Pin Code Authentication". Underneath, the word "Login" is shown with a dotted line below it. A paragraph of text reads: "To authenticate with your Temporary Pin Code, please check your registered email address and enter the Pin Code below." Below this text is a form with a label "Pin Code" on the left, a text input field in the middle, and a "Logon" button on the right. At the bottom of the dialog, a message states: "You have 3 minutes before the temporary Pin Code expires, at which time you will be logged out."

### **AuthAnvil Authentication**

Provides a dialog where you can enter your AuthAnvil Username and Passcode to log in using two-factor authentication. User's must have specified their AuthAnvil Username on the Preferences screen in order to authenticate.

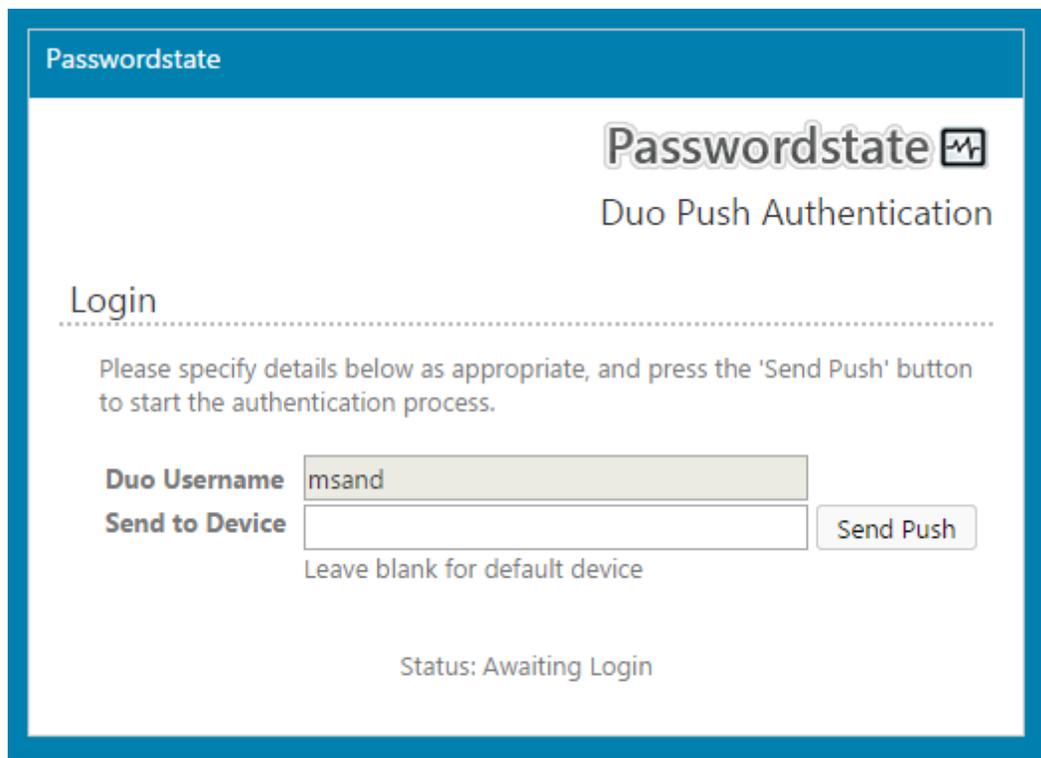


The screenshot shows the Passwordstate login page. At the top, there is a blue header with the text "Passwordstate". Below the header, the "Passwordstate" logo is displayed in a large, stylized font, followed by the text "AuthAnvil Two-Factor Authentication". Underneath, the word "Login" is centered, followed by a horizontal dashed line. A message reads: "Please enter your Username and Passcode below (Passcode = PIN + One Time Password)". There are two input fields: "Username" with the value "msand" and "Passcode" which is empty. A "Logon" button is positioned to the right of the Passcode field. At the bottom center, the status "Status: Awaiting Login" is displayed.

### Duo Push Authentication

Provides a dialog where you can your Duo Push Username to log in using two-factor authentication. User's must have specified their Duo Push Username on the Preferences screen in order to authenticate. You can also choose which device to send the Push Notification to.

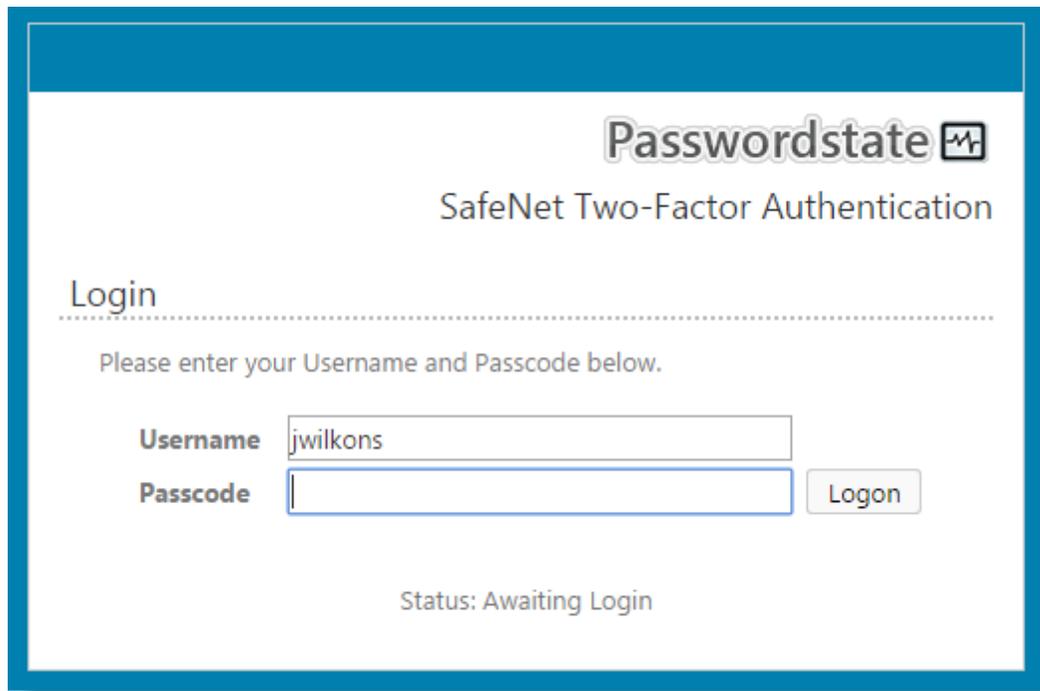
🚩 Please refer to the following document as to how to configure Duo Push Authentication in the Duo Portal and Passwordstate - [Duo Auth API Configuration](#)



The screenshot shows a dialog box titled "Passwordstate" with a blue header. The main content area has a white background and a blue border. At the top right, the "Passwordstate" logo is displayed next to a small icon, with the text "Duo Push Authentication" below it. A section titled "Login" is separated by a dotted line. Below this, a message reads: "Please specify details below as appropriate, and press the 'Send Push' button to start the authentication process." There are two input fields: "Duo Username" containing the text "msand" and "Send to Device" which is currently empty. To the right of the "Send to Device" field is a button labeled "Send Push". Below the "Send to Device" field, the text "Leave blank for default device" is displayed. At the bottom center of the dialog, the status "Status: Awaiting Login" is shown.

### SafeNet Authentication

Provides a dialog where you can your SafeNet Username to log in using two-factor authentication. User's must have specified their SafeNet Username on the Preferences screen in order to authenticate.

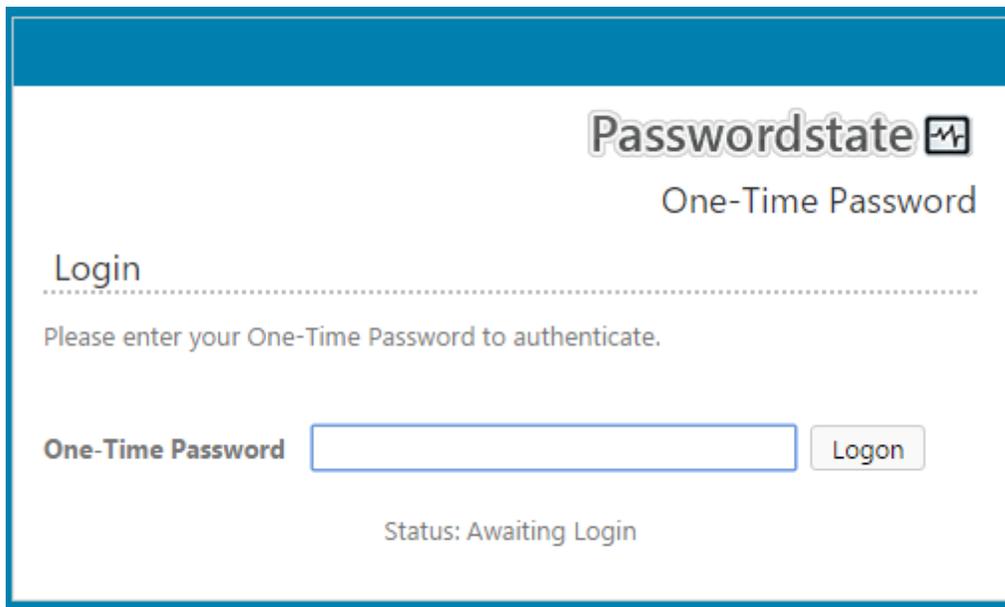


The screenshot shows the Passwordstate login interface. At the top right, the logo 'Passwordstate' is displayed next to a small icon of a document with a checkmark. Below the logo, the text 'SafeNet Two-Factor Authentication' is centered. Underneath, the word 'Login' is followed by a horizontal dotted line. A message reads 'Please enter your Username and Passcode below.' There are two input fields: the first is labeled 'Username' and contains the text 'jwilkons'; the second is labeled 'Passcode' and is empty. To the right of the 'Passcode' field is a button labeled 'Logon'. At the bottom center of the form, the status 'Status: Awaiting Login' is displayed.

### One-Time Password

Provides a dialog where you can enter a One-Time Password from your hardware or software token.

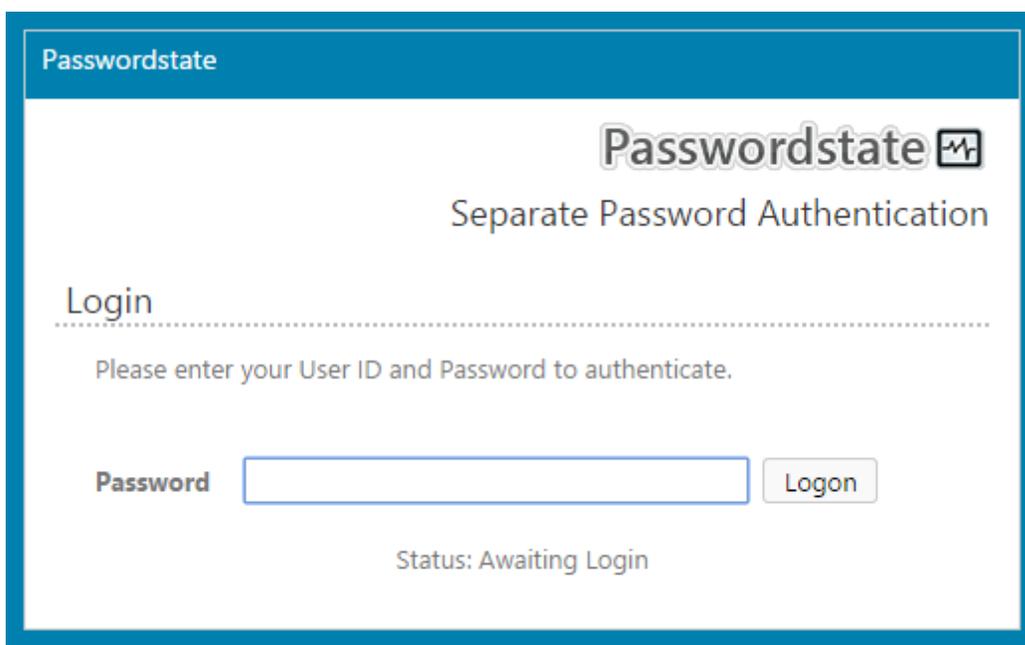
One-Time Password authentication supports the TOTP and HOTP algorithms - TOTP being time-based, and HOTP being counter-based. Both hardware and software tokens can be used for this authentication method. If you enable this authentication option, and users have not configured their preferences for their token, they will be prompted to specify their own settings the next time they access Passwordstate.



The screenshot shows the Passwordstate One-Time Password login interface. At the top right, the Passwordstate logo and a QR code icon are displayed. Below the logo, the text "One-Time Password" is centered. A "Login" header is followed by a dotted line. The instruction "Please enter your One-Time Password to authenticate." is centered. Below this, the label "One-Time Password" is positioned to the left of a text input field. To the right of the input field is a "Logon" button. At the bottom center, the status "Status: Awaiting Login" is displayed.

### Separate Password

Provides a dialog for users to specify a separate authentication password - this works in conjunction with Passthrough AD Authentication. To use this authentication method, the user must specify their separate password on the Preferences screen, or Security Administrators can create a random password for them on the [User Accounts](#) screen.



The screenshot shows the Passwordstate Separate Password Authentication login interface. At the top left, the Passwordstate logo is displayed. Below the logo, the text "Separate Password Authentication" is centered. A "Login" header is followed by a dotted line. The instruction "Please enter your User ID and Password to authenticate." is centered. Below this, the label "Password" is positioned to the left of a text input field. To the right of the input field is a "Logon" button. At the bottom center, the status "Status: Awaiting Login" is displayed.

### RADIUS Authentication

Passwordstate can authenticate to a RADIUS server, and your RADIUS server can be configured for specific authentication methods for different accounts.

Passwordstate   
RADIUS Authentication

Login

.....

Please enter your RADIUS Username and Password to authenticate.

RADIUS Username

RADIUS Password

Logon

Status: Awaiting Login

## Various Authentication Options

---

Some of the authentication methods above also have various options which can be set, and they are:

**If one of the Manual AD Authentication options are selected, auto-populate the UserID field based on the current logged in Active Directory account**

If you select one of the 'Manual AD' authentication options for your users, you can automatically populate the UserID field for them if required.

**If one of the Manual AD Authentication options are selected, show a 'Domains' dropdown list to form part of the Username field**

This option provides a Domain dropdown list on all the Manual AD Authentication screens so the user doesn't need to type the domain prefix for their account

**If using the AD Integrated Authentication version of Passwordstate, and Passthrough Authentication is not selected, make the authentication a two-step process where the user first validates their AD Account, and then the additional Authentication option on the following screen**

By choosing this option, the authentication process will be executed in two-steps - initially just authenticating the user's Active Directory Domain credentials, and then any other additional authentication options selected for their account. This is useful if users need to log into Passwordstate with more than just one account

**If using the Forms Based Authentication version of Passwordstate, disable the feature where users need to regularly change their login password**

When using the Forms Based Authentication version of Passwordstate, by default users will be

required to regularly change their login password. The frequency of the required change can vary from 15 to 90 days, depending on the strength of the password they enter. If you wish to disable this feature, you can do so by selecting 'Yes' here.

**Protect against brute force dictionary authentication attempts by locking out an active session after the following number of failed login attempts**

You can configure the maximum number of failed login attempts, which will trigger a redirect to a brute force lockout screen for the current session. The Brute Force detection feature works for all authentication options in Passwordstate.

## Time-Based One-Time Password Settings

---

With Time-Based One-Time Passwords, you can specify the following settings:

**Allow hardware tokens to have a maximum Clock Drift of**

As hardware tokens age, they can lose time - which is known as Clock Drift. This setting allows Passwordstate to check (x) number of seconds ahead of what the current time is, to detect if there is any clock drift for the user's hardware token. If there is, then the user's preferences will be updated to reflect their token's time is out of sync with the current time.

**Specify the default Time Step setting (seconds) which will apply to new user accounts added to Passwordstate**

Tokens generally use 30 or 60 second time-steps, and you can specify the default value here for all new user accounts which are added to Passwordstate.

## Counter-Based One-Time Password Settings

---

With Counter-Based One-Time Passwords, you can specify the following settings:

**Specify the Look Ahead Window Size for finding a Counter match**

Each time the user clicks on the button on their Counter-Based Token, it increments their counter by 1. As the token may be used for other systems as well, there needs to be a look ahead value to try and find a match. When the user successfully authenticates with a Counter-Based token, their Preferences in Passwordstate are updated again to track what this counter value is - you can edit this on the user's Preferences screen.

**Specify the default number of Digits used for the One-Time Password**

By default, most Counter-Based tokens use 6 digits for authentication, but this can be configured to any value your tokens support - this value is used when creating new user accounts in Passwordstate, and each user can edit their own settings if needed

## SAML2 Authentication Settings

---

In order to use SAML2 authentication in Passwordstate, you must specify the following settings - each of these settings can be obtained within the 'Application' configured in your SAML2 Provider account:

- X.509 Certificate
- IDP Target URL
- IDP Issuer URL

Each SAML2 Provider has different terminology for configuring the required URLs in their 'Application', and you can view several examples in the following section - [SAML2 Provider Examples](#)

 Note 1: When creating your Passwordstate 'Application' with your SAML2 Provider, you must specify SHA1 Signature or Digest Algorithm (SHA Fingerprint), otherwise the validation of the X.509 Certificate will fail

 Note 2: When anonymous authentication is enabled for the site in IIS (which includes forms based authentication as well), you cannot use a User Account Policy to specify the authentication type of SAML - User Account Policies first need to validate who the user is, before the policy can be applied - which defeats the purpose of SAML.

## RADIUS Authentication

---

You can also configure Passwordstate to authenticate to a RADIUS Server, by specifying the relevant field values for your RADIUS server.

 Note 1: Remember to configure a 'Client' for your RADIUS Server with the Host Name or IP Address of your Passwordstate web server

 Note 1: On the user's Preferences screen, they can specify what their RADIUS Username is, and then this will be used on each of the RADIUS authentication screens

## SecurID Two-Factor Settings

---

### **Auto-populate the SecurID UserID field for the user**

If you select one of the 'SecurID' authentication options for your users, you can automatically populate the UserID field for them if required.

### **Make the SecurID UserID field on the login screen read only**

This option prevents a user from walking up to another user's computer, authenticating with their own SecurID Token, but then logging into Passwordstate as the other user - this can happen when the Passthrough authentication occurs after the SecurID authentication happens, as there does not necessarily need to be a correlation between a users SecurID user account and their domain account.

### **When using the Forms-Based Authentication version of Passwordstate and a SecurID authentication option above, show just the SecurID authentication screen on initial login**

When this option is selected, you will not be prompted to enter your forms based UserID and Password, only your SecurID UserID and Passcode.

---

## AuthAnvil Two-Factor Setting

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### **Specify your AuthAnvil Web Services URL and SiteID here**

You must specify your AuthAnvil's Web Services URL and SiteID in order to use this two-factor authentication option. The URL is generally in the format of <https://yourFullyQualifiedDomain.com/AuthAnvil/sas.asmx>

### **Auto-populate the AuthAnvil Username field for the user**

If you select one of the 'AuthAnvil' authentication options for your users, you can automatically populate the Username field for them if required.

### **Make the AuthAnvil Username field on the login screen read only**

This option prevents a user from walking up to another user's computer, authenticating with their own AuthAnvil Username and Passcode, but then logging into Passwordstate as the other user - this can happen when the Passthrough authentication occurs after the AuthAnvil authentication happens

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## Duo Security Two-Factor Settings

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Specify the Integration and Secret Key for your 'Auth API' integration settings, as well as your API HostName

 **Note:** You must have an Enterprise Duo Security account to use this feature, and you need to create a '**Auth API**' integration for your Duo subscription via their web site. Information about configuring the API in Duo's portal can be found here [Duo Auth API Configuration](#)

### **Make the Duo Push Username field on the login screen read only**

This option prevents a user from walking up to another user's computer, authenticating with their own Duo Push Username, but then logging into Passwordstate as the other user - this can happen when the Passthrough authentication occurs after the Duo Push authentication happens

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## Email Temporary Pin Code Settings

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The Temporary Pin Code Settings allows you to specify the length of the Pin Code, and also how long until the temporary Pin Code will expire if not used.

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## Minimum ScramblePad Pin Length

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By default, the ScramblePad Pin length is 4 characters, but can be changed if required.

**System Settings**

To modify the system settings, please make changes within the appropriate tabs below, then click on the 'Save' button.

active directory options | allowed ip ranges | api keys | **authentication options** | branding | check for updates | email alerts & options | high availability options  
 hosts | miscellaneous | mobile access options | password list options | password options | password reset options | proxy & syslog servers | usage tracking  
 user acceptance policy

The default authentication option in Passwordstate is 'Passthrough AD Authentication'. This authentication option automatically passes your domain credentials from the browser to the Passwordstate web site, and does not require any input from the user.

**Web Authentication Options**

Please specify which 'System Wide' Authentication method will apply to users who do not have any options selected as per of their 'Preferences' or via a 'User Account Policies'.

Choose Authentication Option:

If one of the Manual AD Authentication options are selected, auto-populate the UserID field based on the current logged in Active Directory account:  
 Yes  No

If one of the Manual AD Authentication options are selected, show a 'Domains' dropdown list to form part of the UserName field:  
 Yes  No

If using the AD Integrated Authentication version of Passwordstate, and Passthrough Authentication is not selected, make the authentication a two-step process where the user first validates their AD Account, and then the additional Authentication option on the following screen:  
 Yes  No

If using the Forms Based Authentication version of Passwordstate, disable the feature where users need to regularly change their login password:  
 Yes  No

Protect against brute force dictionary authentication attempts by locking out an active session after the following number of failed login attempts:

**Please Note**

When using the default Passthrough authentication method, the only true way to expire a user's login credentials after logging out is to close the browser window. Clicking on the 'Log Back In' button, or refreshing the page, simply re-authenticates the user. Please make your users aware of this if they log into Passwordstate from different computers to their own.

**Time-Based One-Time Password Settings**

### 29.4.1 Duo Auth API Configuration

In order to use the Duo Authentication feature, you must have an Enterprise account with Duo Security, and you need to create an 'Auth API' Application in the Duo Portal, so you can add these settings into Passwordstate. The following instructions will show you how to do this.

- First, login to your Duo Portal, and click on the 'Applications' menu
- Click on 'Protect an Application'

**Applications**

[+ Protect an Application](#)

Name ^	Type ^	New User Policy ^	Additional Information ^
<a href="#">Passwordstate</a>	Auth API	Require Enrollment	

Show  applications 1-1 of 1 total

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- Chose the 'Auth API' Application

## Protect an Application

Filter by keywords: VPN, Microsoft, SAML...

-  **Array SSL VPN**  
[Protect this Application](#) | [Read the documentation](#)
-  **Auth API**  
[Protect this Application](#) | [Read the documentation](#)

- Create the Secret Key and Name the Auth API as appropriate

## Auth API

[Authentication Log](#) [× Remove Application](#)

*i* See the [Auth API documentation](#) to integrate Duo into your custom application.

### Details

[Reset Secret Key](#)

Integration key

Secret key

Don't write down your secret key or share it with anyone.

API hostname

### Settings

#### General

Type

Name

Duo Push users will see this when approving transactions.

Username normalization  **None**  
No changes are made to the username.

- Now in Passwordstate, select the appropriate authentication option you want, and populate the Duo Two-Factor Settings section.

**Choose Authentication Option:**

Passthrough AD Authentication  
 Manual AD Authentication  
 Manual AD and Google Authenticator  
 Manual AD and RSA SecurID Authentication  
 Manual AD and ScramblePad Authentication  
 Manual AD and Email Temporary Pin Code  
 Manual AD and AuthAnvil Authentication  
 Manual AD and Duo Push Authentication  
 Manual AD and SafeNet Authentication  
 Google Authenticator  
 RSA SecurID Authentication  
 ScramblePad Authentication  
 Email Temporary Pin Code  
 AuthAnvil Authentication  
 Duo Push Authentication

change their login password:

Yes  No

## SecurID Two-Factor Settings

**Auto-populate the SecurID UserID field for the user:**

Yes  No

**Make the SecurID UserID field on the login screen read only:**

Yes  No

**When using the Forms-Based Authentication version of Passwordstate and a SecurID authentication option, just the SecurID authentication screen on initial login:** (by selecting this option, your UserIDs in Passwordstate, SecurID UserIDs, and any User Preferences or User Account Policies for Authentication will be ignored)

Yes  No

## AuthAnvil Two-Factor Settings

**Specify your AuthAnvil Web Services URL and SiteID here:** (the AuthAnvil URL is generally in the format of <https://yourFullyQualifiedDomain.com/AuthAnvil/sas.aspx>)

**AuthAnvil URL:**

**AuthAnvil SiteID:**

**Auto-populate the AuthAnvil Username field for the user:**

Yes  No

**Make the AuthAnvil Username field on the login screen read only:**

Yes  No

- And on the user's Preferences screen in Passwordstate, on the 'Authentication Options' tab, just must have the Duo username matching the UserName which has been created in the Duo Portal.

## 29.4.2 SAML2 Provider Examples

Following are some example of how you enable SAML2 to authenticate to different Providers.

### Okta.com URLs

---

Below is an example of the URLs to use in 'Application' you've created in the Okta.com portal.

- Single Sign On URL - <https://<YourURL>/logins/saml/default.aspx>
- Recipient URL - <https://<YourURL>/logins/saml/default.aspx>
- Destination URL - <https://<YourURL>/logins/saml/default.aspx>
- Audience Restriction - <https://<YourURL>/logins/saml.aspx>
- Default Relay State - <https://<YourURL>/logins/saml/default.aspx>

### OneLogin.com URLs

---

Below is an example of the URLs to use in 'Application' you've created in the OneLogin portal.

- RelayState - <https://<YourURL>/logins/saml/default.aspx>
- Audience - <https://<YourURL>/logins/saml.aspx>
- Recipient - <https://<YourURL>/logins/saml/default.aspx>
- ACS (Consumer) URL Validator - [https://<YourURL>/logins/saml/default.aspx/\\$](https://<YourURL>/logins/saml/default.aspx/$)
- ACS (Consumer) URL - <https://<YourURL>/logins/saml/default.aspx>

## Active Directory Federation Services 3.0 (ADFS)

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Below are some instructions for configuring ADFS to use with Passwordstate's SAML authentication option.

### Active Directory Federation Services 3.0 Relying Party Trust Configuration for Passwordstate SAML2 Authentication

- Right click on "Relying Party Trust" in "AD FS Management" under "Trust Relationships" and select "Add Relying Party Trust..."
- Click "Next"
- Select "Enter data about the relying party manually"
- Enter a display name, this is visible to end users depending on whether they use the Passwordstate URL directly, or login via the ADFS Idp login (no one uses this)
- Select "AD FS profile" (SAML 2.0)
- Do not configure a certificate
- Select "Enable support for the SAML 2.0 WebSSO protocol." For the URL, use the following format <https://<YourURL>/logins/saml/default.aspx>
- For the Relying party trust identifier, enter the URL of the passwordstate instance: <https://<YourURL>>
- Configure Multi-Factor authentication if necessary.

- Configure Issuance Authorization Rules if necessary.
- Click “Next”
- Leave “Open the Edit Claim Rules dialog for this relying party trust when the wizard closes” and click “Close”
- Click “Add Rule...”
- Select “Send LDAP Attributes as Claims” and click “Next”
- Enter a name for the “Claim rule name”
- Select “Active Directory” from the “Select an attribute store...” drop down
- Select “E-Mail-Addresses” under “LDAP Attribute (Select or type to add more)”
- Select “Name ID” under “Outgoing Claim Type (Select or type to add more)”
- Click “Finish”
- Click “OK”
- Right click on the new Relying Party Trust and select “Properties”
- Select the “Endpoints” tab
- Select the only SAML Assertion Consumer Endpoint entry and select “Edit”
- Check the box “Set the trusted URL as default”
- Click “OK”
- Select the “Advanced” tab
- Select “SHA-1” from the “Secure hash Algorithm” drop down
- Click “OK”

#### **Passwordstate SAML2 Configuration for ADFS**

- Right click the “Token-signing” certificate in “Certificates” under “Service” in “AD FS Management”
- Select “View Certificate...”
- Select the “Details” tab
- Select “Copy to File”
- Click “Next”
- Select “Base-64 encoded X.509 (.CER)”
- Click “Next”
- Select a file path to save the certificate
- Click “Next”
- Click “Finish”
- Click “OK”
- Open the .CER certificate file with Notepad or another text based editor.
- Copy all of the text in the file
- Go to “authentication options” in “System Settings” in “Administration” in Passwordstate
- Paste the text from the .CER file in “X.509 Certificate:” under “SAML2 Authentication Settings”
- Set “IDP Target URL” to “https://<YourADFSURL>/adfs/ls/idpinitiatedsignon.aspx?loginToRp=<https://<YourURL>>”
- Set “IDP Issuer URL” to “http://<YourADFSURL>/adfs/services/trust”

## 29.5 Branding Tab

The Branding Tab allows you to hide/show the Passwordstate Build Number at the top of the screen, specify your own custom Logos to use at the top left-hand side of the page, and on various Dialog windows, as well as your own custom Page Titles.

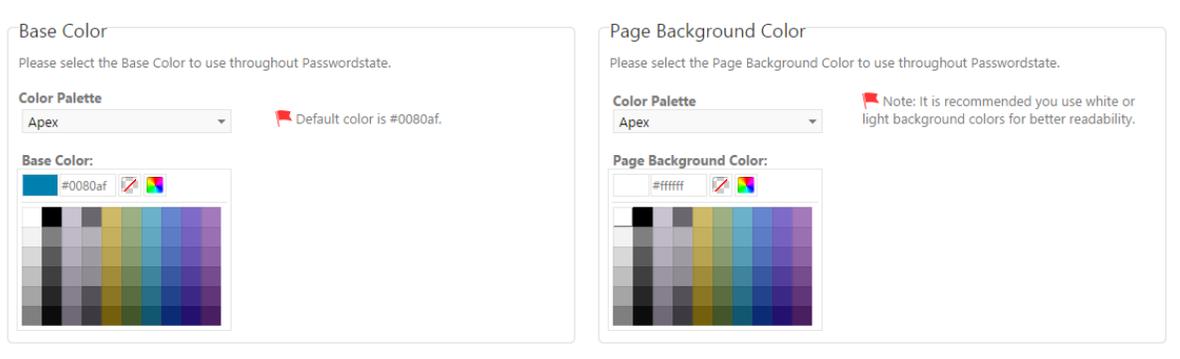
The following branding options are available:

- Show Passwordstate Build Number - you can show this build number to all users of Passwordstate, or just Security Administrators
- Main Page Title and Logo - Change the Passwordstate logo to your own custom logo, plus the Page Title displayed in Tab of your browser
- Dialog Title and Logo - Change the Passwordstate logo in each of the Authentication Dialog windows, plus the Page Title
- Mobile Client Title and Logo - Change the Passwordstate logo for the mobile client, plus the Page Title
- Color Scheme - Change the color scheme you see in Passwordstate - the Base color, and Page Background Color

 Note 1: The logos are stored within the database, and restarting the Passwordstate Windows Service will recreate the logos on the file system if they are accidentally deleted for any reason.

 Note 2: Adobe Photoshop template files are also provided, allowing for easier creation of your own logos if required.

You can also change the default colors in Passwordstate, by specifying your own 'Base' color, and Page Background color. [User Account Policies](#) can also be used to apply different colors for different sets of users.



## 29.6 Check for Updates Tab

The Check for Updates Tab allows you to specify how frequently the Passwordstate web site should check for new updates, and who it should display the new build notification to.

This feature queries the following file - [www.clickstudios.com.au/NewBuildInfo.xml](http://www.clickstudios.com.au/NewBuildInfo.xml), and if a new build is found, the notification will be displayed at the top left-hand side of the screen, just next

to the main logo.

 Note: Depending upon your environment, you may need to specify proxy authentication details on the [Proxy & Syslog Servers Tab](#) for this feature to work.

## 29.7 Email Alerts & Options Tab

The Email Alerts & Options Tab allows you to specify your email servers settings, so emails can be generated from Passwordstate, as well as multiple settings and notifications relating to emails being sent.

### Send email alerts to Security Administrators (who have User Accounts role) for Failed Login Attempts

---

There are two different scenarios in which your users must authenticate when using Passwordstate:

1. When they first browse to the web site
2. If a Password List is configured to require an 'Additional Authenticate' step prior to the Password List being accessible

By selecting this option, Security Administrators who have the 'User Accounts' role will be alerted, via email, to any failed login attempts. Failed login attempts are also recorded and reportable on the Auditing screens.

### Only send Failed Login Attempt email alerts to Security Administrators if the following conditions are met

---

If Security Administrators don't wish to be alerted to every single failed login attempt by individual users, you can set a threshold which must be met before an email is sent. Even if this option is used to not be notified every single time, auditing data is recorded for all failed login attempts.

### Alert Security Administrators if there are an excessive number of events (from a single user) for Viewing, Copying or Exporting Passwords. Alert if the following condition is met

---

Another option which alerts to uncommon behavior is to notify Security Administrators when an individual user is viewing, copying or exporting a lot of password data within a set period of time i.e. if a user views 10 password records within a single minute, then this is not common behavior and you may have an issue with potential information leakage/theft.

### When users 'Request Access' to Passwords or Password Lists, in

---

---

## addition to emailing the request to Password List Administrators, also email it to Security Administrators with the following roles

---

By default, Password or Password List Access Requests are routed to the Administrators of the relevant Password Lists. If you would also like the access requests to be sent to various Security Administrators, you can use this option to choose which Security Administrator roles will receive the requests

## When users 'Request Access' to Passwords or Password Lists, if there are no Administrators assigned to the Password List, email the request to Security Administrators with the following roles

---

It's possible that there may be no 'Administrator' permissions assigned to a Password List for your users - only Modify or View permissions. If this is the case, someone needs to be notified when users request access to passwords in a Password List which is configured this way. You can use this option to specify where the request is routed i.e. which Security Administrators will receive the 'Request Access' email and popup notification.

## Send email alerts to Security Administrators (with the following role) when passwords are exported

---

If you would like to alert your Security Administrators when users are exporting password data, you can use this option to do so.

## Use the following settings to send emails from within Passwordstate

---

As various functions are performed in Passwordstate, email records will be generated and stored in the QueuedEmail table. The Passwordstate Windows Service checks this table once every minute, and sends the emails if any exist. In order for emails to be sent, you need to specify various settings for your email server. In particular:

- Host Name and Port Number
- Which SMTP address you would like the emails to be sent from
- Whether or not your email server is configured to send via TLS (Transport Layer Security)
- And if you need to specify an account to send from i.e. Sending Anonymous SMTP emails is not allowed from your email server

 **Note:** If the account stored for this setting is also stored in a Password List which is enabled for synchronizing of passwords into Active Directory or local Windows Servers, then this password below will also be updated when a synchronization occurs.

## 29.8 Folder Options

The Folder Options tab allows you to specify various settings for Folders within the main Navigation Tree.

## Allow Permissions on Folders to be managed manually (by default, permissions on nested Password Lists are propagated upwards to upper level Folders):

---

By default, permissions on Folders are automatically managed for you, and are applied whenever permissions change for any nested Password Lists beneath the folder. If you do wish to manage permissions manually for Folders, setting this option to 'Yes' will show you the 'Permissions' button and options.

 **Note:** When managing permissions on Folders manually, the permissions are not propagated down the Password List Navigation tree - permissions on Password Lists needs to be managed explicitly, unless you use the Propagate Permissions Downwards' feature below

## Enable the 'Propagate Permissions Downwards' feature for top level Folders

---

With this option enabled, in conjunction with the 'Allow Permissions on Folders to be managed manually' above, permissions on top level Folders can be propagated down to all nested Password Lists and Folders

## Use the 'Set Permissions' button below to specify which users are allowed to create Folders in the root of Passwords Home

---

You can set permissions for which users are allowed to create Folders in the root of the Navigation Tree (Password Home)

## 29.9 High Availability Options Tab

If you have purchased the High Availability option for Passwordstate, the High Availability Options Tab allows you to specify the following settings:

- How frequently the High Availability instance should check for new or updated logos and custom images. If there are any new or updated images, they will be written to disk on the schedule provided
- When a user accesses the High Availability instance of Passwordstate, you can send email alerts to Security Administrators with the selected following role(s). This is useful as it gives you the opportunity to investigate why the user is accessing the High Availability instance, when they should be accessing the Primary instance.

 **Note:** Even though the High Availability instance is 'Read-Only', all actions are audited, with audit data being merged back into the primary database. Even if the primary database is offline, it will be merged back in later when the database is once again available

## 29.10 Hosts Tab

The Hosts tab has a few options for showing or hiding all the Hosts users have access to, on the Password Home and Remote Session Launcher pages, and also some Heartbeat Polling settings for checking if Hosts are available on the network. Options available are:

- On the 'Passwords Home' screen, either 'Show All Hosts' the user has access to, or make them search for the Hosts
- On the 'Remote Session Launcher' screen, either 'Show All Hosts' the user has access to, or make them search for the Hosts
- By default, all users have access to all Host records on the screen Resets -> Hosts. If you want to restrict access on this screen, you can do so by using the 'Host Permissions' button. You can also remove the entire menu as well, from the screen [Menu Access](#)
- There are also various Heartbeat options for processing Host records when they are no longer available on the network
- When executing various Password Reset and Discovery Scripts, you can also specify Host connectivity settings as well

### System Settings

To modify the system settings, please make changes within the appropriate tabs below, then click on the 'Save' button.

active directory options   allowed ip ranges   api keys   authentication options   branding   check for updates   email alerts & options   folder options  
high availability options   **hosts**   miscellaneous   mobile access options   password list options   password options   password reset options  
proxy & syslog servers   usage tracking   user acceptance policy

Please specify settings for Hosts and the Remote Session Launcher feature as appropriate.

#### Host Options

On the 'Passwords Home' screen, either 'Show All Hosts' the user has access to, or make them search for the Hosts:

Show All Hosts    Make The User Search

On the 'Remote Session Launcher' screen, either 'Show All Hosts' the user has access to, or make them search for the Hosts:

Show All Hosts    Make The User Search

Specify which users are allowed to Add, Edit and Delete Host records on the screen Resets -> Hosts:

#### Host Heartbeat Polling

Each Host will be polled daily to check the online status, during the hours specified for the relevant Operating System. The polling hours per Operating System can be changed on the screen Administration -> Host Types and Operating Systems.

If a Managed Host cannot be reached for  Days in a row, then  Do Nothing    Set the Host to Unmanaged    Delete the Host

If an Unmanaged Host cannot be reached for  Days in a row, then  Do Nothing    Delete the Host

For the Heartbeat Ping Test, use a Packet Size of  bytes

For the Heartbeat Ping Test, send  echo requests, with a timeout of  milliseconds

For the Heartbeat Open Port Test, use a timeout of  milliseconds (port test is only executed if ping test fails)

#### Host Connectivity Timeout Settings

Specify timeout settings for the execution Discovery, Reset and Password Validation Scripts.

Specify the timeout period for establishing a connection to the remote Host:  milliseconds

Specify the the maximum time that any operation can run:  milliseconds

## 29.11 Miscellaneous Tab

The Miscellaneous Tab has multiple settings which don't necessarily apply to any of the other Tabs.

### Default Locale (Date Format)

---

Applies date formatting rules to any date fields you see in Passwordstate. If users are located in a different region to what is set system wide, they can specify their own date format as part of their 'Preferences'.

### Inactivity Time Out (mins)

---

Allows you to specify the period in which users will be automatically logged out of Passwordstate if their session is inactive.

### Specify the Base URL used in any emails generated by Passwordstate

---

This URL field is used as hyperlinks in any emails generated from Passwordstate.

### Force the use of an SSL Certificate (HTTPS)

---

When set to Yes, if the user types HTTP into the browser address bar, they will be redirected to HTTPS - which securely encrypts all traffic between the user's browser and the web site. The API will return a 403 Forbidden message if HTTPS is not used.

### Use the following type of Navigation Menu system

You can choose to use a Vertical navigation Menu on the left-hand side of the screen, or a Horizontal navigation Menu at the bottom of the screen.

### Show Password List Auditing data to users with the following permissions

---

Beneath each Password List grid you see on the Password screens, there is a 'Recent Activity' grid. This data in the 'Recent Activity' grid is all auditing data specify to the Password List you are viewing. You can choose to hide this grid by deselecting the relevant role for this setting - this will also remove the Password List from the 'Auditing' section that users have access to.

### When expanding/collapsing nodes in the Passwords Navigation Tree, show a loading animation icon when the count of nodes in the tree is greater than

---

If you have many Password Lists and Folders visible in the Navigation Tree for your users, there may be a small delay in expanding/collapsing tree nodes. If this is the case, you can display a

loading animation icon during the expand/collapse process - so your users are aware something is in progress. This generally isn't required, but may be desirable if you have 500+ Password Lists/Folders.

## When generating a password based on a Password Generator Policy, perform the following number of retries to ensure the password meets the strength of the selected Password Strength Policy

---

When using the Password Generator feature  to generate new passwords for a Password List, the Password Generator tries to create a password which matches the Password Strength Compliance level set for the Password List. Depending on the settings for the selected Password Generator Policy, it's possible the generating of passwords may get itself in an endless loop trying to match the Password Strength Compliance level, so this setting tells the generator when to give up trying and simply use the last generated password.

## Limit the size of scheduled HTML email reports to

---

All the available reports on the 'Reports' screen can be sent as either csv attachments, or embedded HTML within the email. If your users choose embedded HTML, large reports can cause performance issues when trying to open and read the email. This option allows you to specify the maximum size of the report. If the maximum size is reached, the user is informed of this within the email, and they are recommended to change the report to a csv attachment.

## Use regular expressions when matching 'Bad Passwords'

---

If the use of 'Bad Password' detection is enabled on the [Password Options Tab](#), the use of regular expression matching means the bad password can be detected anywhere within the string, not just the bad password on its own i.e. mypassword would be deemed as a bad password, as it contains the word password.

## Enable option for purging of Auditing records

---

If you don't want to give Security Administrators the ability to purge (delete) auditing records on the [Auditing](#) page, then you can hide the controls which allow the purging.

## When displaying URL columns in grids, display the URL value as a

If you have chosen the URL field for any one of the Password Lists, there are two formats the URL can be displayed in when viewed in the Passwords grid - either a hyperlink text field, or hyperlink icon - both of which will launch the URL when clicked on. They are displayed in the following manner:

URL
<input type="text"/> <input type="button" value="Y"/>
<a href="ftp.iinet.net.au/debian/&lt;b&gt;debian-cd&lt;/b&gt;/">ftp.iinet.net.au/debian/&lt;b&gt;debian-cd&lt;/b&gt;/</a>
<a href="ftp.iinet.net.au/debian/debian-cd/">ftp.iinet.net.au/debian/debian-cd/</a>
<a href="http://www.borland.com">www.borland.com</a>
<a href="http://www.telerik.com">http://www.telerik.com</a>
<a href="https://www.telerik.com">https://www.telerik.com</a>
<a href="ftp://ftp.iinet.net.au/debian/debian-cd/">ftp://ftp.iinet.net.au/debian/debian-cd/</a>

Or

URL
<input type="text"/> <input type="button" value="Y"/>
<input type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>

## Allow Documents to be uploaded into Passwordstate

---

If you don't want your users uploading documents into the Passwordstate database, you can set this option to No.

---

## Disable the popup Guided Tour for new user accounts

---

If you do not wish new user accounts to see the popup Guided Tour window when they first log into Passwordstate, then you can disable this feature - the guided tour is still available under the Help menu if required.

## On the Permalink screens, allow the following types of user roles to see the list of email address stored in Passwordstate

---

If you wish to hide all the email addresses registered in Passwordstate on the Permalink screens, you can restrict visibility to just Security Administrators by selecting this option

## 29.12 Mobile Access Options

The Mobile Access Options tab allows you to specify multiple settings for how the Passwordstate Mobile Client behaves for your users.

---

### Allow Mobile clients to access Passwordstate:

---

If you do not wish to allow Mobile Access to passwords, you can disable access altogether by selecting this option.

 Note 1: If you choose to disable Mobile Access, it is recommended you set the option below to 'No', and then go to the screen Administration -> Passwords Lists -> Mobile Access Bulk Permissions, and then disable Mobile Access for all permissions

 Note 2: Even if this option is enabled, your Firewall/System Administrators still need to configure external DNS and allow access through the firewall for anyone to access the Mobile Client web site

---

### When adding new permissions to Password Lists, enabled Mobile Access by default:

---

When adding new permissions to a Password List, you can use to enable/disable Mobile Access by selecting the appropriate option here.

---

### Use the following authentication method for the Mobile Client:

---

There are four types of Authentication Options available for the Mobile Client:

- Mobile Pin Number - a numeric pin code that the user can specify on their Preferences screen
- Active Directory Authentication - authenticate using the users Active Directory UserID and Password
- Email Temporary Pin Code - Two-Factor Authentication using the emailing of a temporary pin

code, which expires after a set period of time

- AuthAnvil Authentication - Two-Factor Authentication using Scorpion Software's AuthAnvil solution
- Google Authenticator - Two-Factor Authentication using the Google Authenticator solutions
- Duo Push Authentication - Two-Factor Authentication using Duo Security's Push Authentication - Note: You must have an Enterprise account with Duo Security to use this feature
- SafeNet Authentication - Two-Factor Authentication using SafeNet's On-Premise or cloud based authentication services
- One-Time Password - Two-Factor Authentication using either hardware or software tokens, based on the TOTP or HOTP algorithms (TOTP is time-based and HOTP is counter-based)
- RADIUS Authentication - Authenticate to a RADIUS server which can be configured for various authentication methods per user account, including multiple two-factor methods

### **The Mobile Access Pin Number for user authentication must be a minimum length of:**

---

You can choose the length of the Mobile Access Pin Number the users must use to authenticate with. When the users specify their own Pin Number on the Preferences screen, or use the option to generate one, it must meet the minimum length requirement of this setting.

### **The Inactivity Timeout for Mobile Access is (mins)**

---

If the user forgets to log out of the Mobile session, this setting will automatically log them out after the set period of inactivity, and also clear their authenticated session.

### **Protect against brute force dictionary authentication attempts by locking out an active session after the following number of failed login attempts:**

---

As the Mobile Access web site is generally externally accessible from your internal network, this setting will mitigate against any brute force authentication attempts by locking out authentication attempts when this setting has been reached.

 System Settings

To modify the system settings, please make changes within the appropriate tabs below, then click on the 'Save' button.

active directory options   allowed ip ranges   api key   authentication options   branding   check for updates   email alerts & options   high availability options  
miscellaneous   **mobile access options**   password list options   password options   password reset options   proxy & syslog servers   user acceptance policy

Please specify appropriate settings for Mobile Access to Passwordstate.

**Allow Mobile clients to access Passwordstate:** (Permissions needs to be set at the Password List level if this option is enabled)  
 Yes  No

**When adding new permissions to Password Lists, enabled Mobile Access by default:** (Permissions can also be changed in bulk on the page Administration -> Password Lists)  
 Yes  No

Use the following authentication method for the Mobile Client:  
Mobile Pin Number

The Mobile Access Pin Number for user authentication must be a minimum length of:  
4

The Inactivity Timeout for Mobile Access is (mins):  
5

Protect against brute force dictionary authentication attempts by locking out an active session after the following number of failed login attempts:  
5

Save Save & Close

## 29.13 Password List Options Tab

The Password List Options Tab provides multiple settings which are applicable to Password Lists in Passwordstate.

### Allow users to export details from their private Password Lists

If you wish to prevent users from exporting passwords from their Private Password Lists, you can do so by selecting this option.

### Allow Password List Administrators to export passwords from Shared Password Lists:

If you wish to prevent users from exporting passwords from any Shared Password Lists, you can do so by selecting this option.

### Select which Code Page to use when Importing or Exporting data

When importing or exporting data, you can specify the default Code Page which will be used for character encoding - A Code Page consists of a table of values that describes the character set for a particular language. By default, all Password Lists will use the Code Page you specify here, but can be changed to use a different Code Page by editing the Password Lists settings.

### Modify permissions for Password Lists can

When a user is given 'Modify' permissions to a Password List, the default options allows the user to add new passwords, and edit or delete existing passwords. You can modify this default behavior by unchecking one or more options here.

### **When users create a Password List and copy permissions from another Password List or Template, also add permissions for the user creating the Password List**

---

When creating new Shared Password Lists, if permissions are being copied from another Password List or Template, this option allows you to also add permissions for the user who is creating the Password List - so instead of just cloning permissions, you can clone plus add the 'creator's account as well.

### **When administering Password List permissions from within the 'Administration' area, prevent Security Administrators from granting themselves permissions to passwords - either via their own account, or security groups which they are a member of**

---

If you wish to prevent Security Administrators with the 'Password Lists' role from being able to grant themselves access to Password Lists via the Administration area, you can check this option.

### **When copying settings from a Template to a Password List, also copy the following field values**

---

By default, the Password List Name and Description fields aren't populated when copying settings from another Password List or Template. With these two options you can choose to copy them if needed.

### **When copying settings from a Template to a Password List, allow a different image for the Password List to be selected**

---

If you want to be able to select a different image to be associated with a Password List when copying settings from a Template, then set this option to Yes

### **Allow users to copy/move/link passwords to Password Lists which they have View access to**

---

It's possible for your users to copy or move passwords around between different Password Lists they have access to. By selecting this option, you allows them to copy/move/link passwords into Password Lists they only have View Access to. If deselected, they will only be able to do so to Password Lists they have Modify or Admin access to.

### **When copying/moving/linking passwords between Password Lists,**

---

---

## allow users to view all Password Lists, not just the ones they have access to

---

When your users copy/move/link passwords between different Password Lists, by default they will only be able to see the 'destination' Password Lists on the screen which they have been given access to. It's possible you may have a requirement to allow them to copy/move/link into Password Lists they don't have access to, and by selecting this option they will be allowed to do this.

---

## When searching for users in order to grant them access to Password Lists, only show users who are in the same Security Groups as the person granting the access

---

In the main 'user' screens of Passwordstate (i.e. not the Administration area), there are various screens where you can apply permissions for users accounts. By selecting this option, they will only be able to see/search for users who are in the same Local or Active Directory Security Groups as themselves - as they are recorded in Passwordstate.

---

## When creating new Shared Password Lists, if there is a User Account Policy or a User Preference setting which copies settings/permissions from a Template, allow the user to override these setting

---

It's possible for users via their Preferences screen, or Security Administrators via a User Account Policy, to specify which template settings to be used as a basis for newly created Shared Password Lists. If one of these settings are in place for the user, this option allows them to specify a different template if needed

---

## When creating new Private Password Lists, if there is a User Account Policy setting which copies settings from a Template, allow the user to override these setting

---

It's possible for Security Administrators via a User Account Policy, to specify which template settings to be used as a basis for newly created Private Password Lists. If this User Account Policy is in place for the user, this option allows them to specify a different template if needed

---

## When creating a new Password List, and copying settings from a Template, automatically select the option to link the Password List to the Template

---

When creating a new Password List, and you copy settings from an existing Password List Template, you can choose to automatically link the Password List to the template if required.

## When creating a new Password List, and the settings are being Linked to a Template, allow users to uncheck the option for linking it to the Template

---

If you want to enforce a Password List to be linked to a template, then you can set this option to No - the user's will then not be able to uncheck the option which links the Password List

## When a new User Account is added to Passwordstate, automatically create a Private Password List for the user

---

If you would like all new User Accounts added to Passwordstate have a Private Password List created for them, you can set this option to Yes - and also name what the Password Lists should be titled as. Users can then make modifications to settings on these Password Lists when they first access them if required

## Show the Account Types label next to the Image within each of the Password Grids

---

In each of the different Password Grids, it's possible to display the Account Type column. In this column you can show just the image for the Account Type, or the image and the label for the Account Type

## Allow users to nest Password Lists and Folders beneath other Password Lists

---

It is not generally recommended that this option is enabled, as it can cause some confusion between Folders and Password Lists - in particular the permission model, and also searching for passwords.

## Allow permissions to be applied multiple times for a user/security group to the same Password, Password List or Folder

---

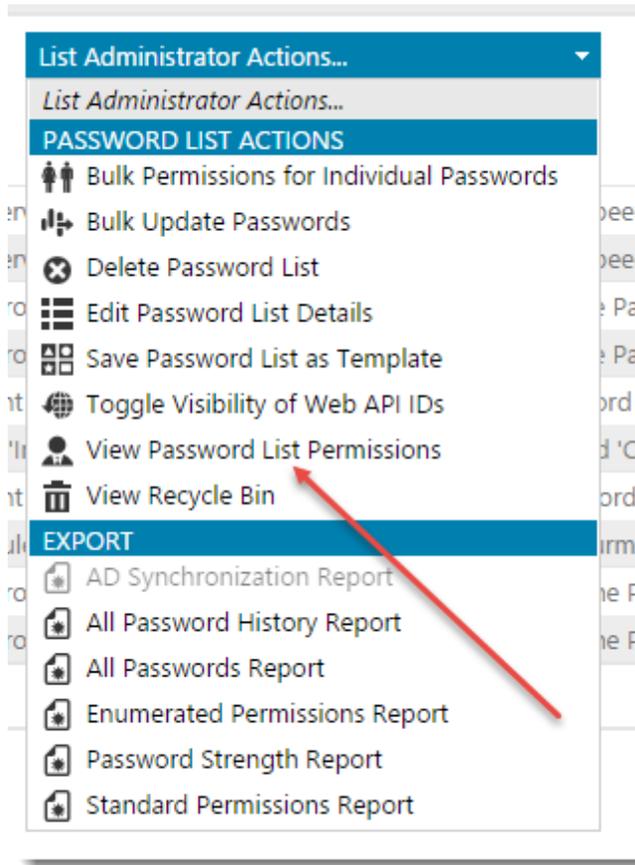
Under certain circumstances, you may wish to allow the application of multiple permissions to a Password List, Password record or Folder, for user accounts or security groups. If this is a requirement, you can check this option.

## Allow users to view Password List permissions when they are not Administrators of the Password List

---

Under each Password List grid there is a drop-down list called 'List Administrator Actions'. The majority of options in this drop-down list are only accessible to Administrators of the Password List. If a user does not have Administrators rights to the Password List, it might still be useful if they can see what other users or security groups have access to the Password List. By enabling this option, the 'View Password List Permissions' feature will be available to them - they will only be

able to view permissions, not change them.



**Use the 'Set Permissions' button below to specify which users are allowed to create Shared Password Lists in the root of Passwords Home**

You can set permissions for which users are allowed to create Shared Password Lists in the root of the Navigation Tree (Password Home)

**Use the 'Set Permissions' button below to specify which users are allowed to create Private Password Lists in the root of Passwords Home**

You can set permissions for which users are allowed to create Private Password Lists in the root of the Navigation Tree (Password Home)

**When a new Password List is created, apply the following permission to the user who created the list**

When new Password Lists are created, the default option is to provide the user Administrative rights to the Password List. If required, you can change this default behavior to either Modify or View permissions

## When new Shared Password Lists are created, grant Security Administrators with the selected role below admin rights to the Password List

---

As new Password Lists are created, you can also choose to automatically grant one or more Security Administrators of Passwordstate administrative rights to the Password Lists. You can do this by selecting the 'All Security Administrators' option, or just the ones who are assigned a specific Security Administrator role.

## Specify which users are allowed to Drag-N-Drop Password Lists around in the Navigation Tree

---

You may not want all users dragging and dropping Password Lists and Folders around in the main Navigation Tree. If this is the case, you can set permissions here for who can do this - this also assumes they have the correct permissions on each of the Password Lists to be able to do this.

### 29.14 Password Options Tab

The Password Options Tab has multiple settings applicable to Password values being visible on the screen, clearing the clipboard, and Bad Password detection.

## Synchronize the 'Deleted' status of Linked Password records across all affected Password Lists

---

When Password records are copied & linked between different Password Lists, you can use this option to specify whether all of the 'linked' records are moved to the Recycle Bin when one of them is deleted. If the option is not selected, the other linked records will remain visible in each of their respective Password Lists.

## Show the 'Send Self Destruct Message' Actions menu item for Password records

---

If you don't want users to see the 'Send Self Destruct Message' Actions menu item for individual password record, you can hide it using this option.

## Show the 'Remote Session Launcher with these Credentials' Actions menu item for Password records

---

If you don't want users to see the 'Remote Session Launcher with these Credentials' Actions menu item for individual password record, you can hide it using this option.

---

## Enable the 'View & Compare History of Changes' menu option for Password records for users who have the following permissions to the Password List

---

There is a 'View & Compare History of Changes' menu action for each and every Password record. You can control which users are allowed to access this menu, based on their permissions to the relevant Password List.

---

## On the 'View & Compare History of Changes' screen for Password records

---

When viewing the History of changes to a Password record, you can choose to either show, mask, or hide the password field on the screen

---

## Prevent users from using their 'Personal' Password Generator Policy settings:

---

If you don't want user to be able to use their Personal Password Generator policy settings, you can disable it by setting this option to no.

---

## With the Password Generator in the top toolbar, and on the menu Tools -> Password Generator, select the following Password Generator Policy as the default:

---

You can also select which is the default Password Generator Policy the users can use, and prevent them from selecting a different policy as well. If a Password List is configured to 'Force' the use of a specific policy, then that setting will override this one.

---

## When users add/edit passwords, alert them when a 'Bad Password' is specified and rate it as

---

When your users add or edit password records, you can choose to either alert them when 'bad passwords' are detected, as per the list stored in the [Bad Passwords](#) screen, or you can allow bad passwords to be used. If a bad password is detected, you can specify why Password Strength indicator you would like to be assigned to the password record.

---

## When users are 'Requesting Access' to passwords, hide the following fields due to possible sensitive information being stored in them

---

From the 'Passwords' menu at the bottom of the screen, users are able to request access to either Password Lists or individual Passwords they don't already have access to - assuming you have enabled this feature for them. As viewing password related data can be sensitive by its very nature, you can choose to hide various fields on the screen from your users, either the Username,

Description or Notes fields.

## Allow users to create password records when they only have Guest permissions to the Password List

---

When a user is given access to individual passwords in a Password Lists, as opposed to permissions being applied to the Password List itself, the user is given 'Guest' rights to the entire Password List. This is so the Password List will show in the Navigation Tree on the left-hand side of the main screen. By selecting this option, you will allow users who have Guest access to also create new passwords in the selected Password List.

 Note: If this option is enabled a user creates a new Password record, they will be given Modify rights to the individual Password record they are creating.

## Allow users to create password records when they only have View permissions to the Password List

---

When a user is given View access to a Password List, by default they cannot add password records to the List. By setting this option to Yes, they will be able to add new records.

 Note: Even after the user adds new records when using this option, they will still only have View access to all records in the Password List

## Automatically clear clipboard after the following specified number of seconds

---

When your users copy Passwords to the clipboard using the  icon, you can specify how long before the clipboard is automatically cleared.

 Note: This option is only applicable to Internet Explorer, as it's not possible to automatically clear the clipboard with Firefox or Chrome - a button will appear at the top right-hand side of the screen allowing you to clear the clipboard if required.

## When Password masking is displayed on the grid views (\*\*\*\*\*) show a fixed character length of

---

It's possible to use 'Fixed Length Password Masking' in Passwordstate, as an added security measure. By using this feature, the screens which show a masked password like \*\*\*\*\* will all be of the same length, regardless of how many characters the Password field consists of.

## Automatically hide visible passwords based on the following conditions (in seconds)

---

By clicking on any masked passwords in the grid view, i.e. \*\*\*\*\*, or the  icon on any of the add/edit/view password screens, the password will be revealed to you. There are 3 different

options for how quickly you wish to password to again be masked, and they are:

- Set Time - one set time period for all passwords, regardless of their length and complexity
- Password Complexity - here you can specify 5 different time intervals, each for the different Password Strength ratings
- Password Length - here you can specify up to three different time periods based on the length of the password fields i.e. if the password field is 20 characters in length, you probably would need it to be displayed longer on the screen compare to a record which is only 5 characters long

## 29.15 Password Reset Options

Passwordstate can perform Password Reset for Active Directory accounts, as well as for many other account types. The Password Reset Options tab allows you to specify various settings when updating passwords in Active Directory, and specify who is allowed to enable the 'Password Reset' option on Password Lists

### Active Directory Accounts

---

When a password is configured as an 'Active Directory' account, and you wish to perform passwords resets for these accounts in AD, there are a couple of options you can apply here:

- To validate the password stored in Passwordstate matches what's stored in AD, before a password reset is to occur. This can act as a security measure to prevent users of Passwordstate making changes to AD accounts if they don't know what the password currently is i.e. prevents them from adding a record with any password value, and then performing a reset after that
- Enable the Password List setting of 'Show Active Directory Actions for Passwords which are enabled for Reset' - If this option is enabled, then it can be selecting a part of the settings for a Password List. When selected, it will provide a new Tab on the Edit Password screen which allows you to do the following to the account in Active Directory
  - Unlock the account if locked
  - Set the option 'User must change password at next logon'
  - Disable the account
  - Enable the account
- As Active Directory Accounts can be used as 'Identities' for Windows Services, IIS Application Pools, Scheduled Tasks, etc, after an AD account has been reset, you may want to pause for a specific amount of time before executing any associated Password Reset Tasks for the account. This would generally be used to allow your Domain Controllers to replicate changes for the account, before password resetting of any Windows Services, etc, were to happen.

### Miscellaneous Settings

---

You can also specify what types of Password Lists can have the option 'Enable Password Reset' enabled - you can restrict this for either Private or Shared Password Lists if required

If you are also performing Password Resets and Account Validation for Oracle accounts, you can set the path to the installed Oracle Access Data Components here (ODAC) - this only needs to be modified if you've installed to a different path other than C:\oracleodp

## Enable Password Reset Option Permissions

---

Each Shared Password List or Template can be configured to allow Password Resets with other systems. You may not want all users be able to configure these settings, so by clicking on the 'Set Permissions' button you can specify what User Accounts or Security Groups are allowed to enable this option.

## 29.16 Proxy & Syslog Servers Tab

The Proxy & Syslog Servers Tab allows you to specify proxy server details to allow querying the Click Studios web site for new builds or Passwordstate, or Syslog server details to send all auditing data to.

### Proxy Server Details

---

To check for new builds of Passwordstate, you may need to specify your internal proxy server details, and possibly an account which can authenticate with your proxy server if required.

 Note 1: If the account stored for this setting is also stored in a Password List which is enabled for synchronizing of passwords into Active Directory or local Windows Servers, then this password below will also be updated when a synchronization occurs.

 Note 2: If you are concerned about your Passwordstate web site accessing the Internet, the only file we access is <http://www.clickstudios.com.au/NewBuildInfo.xml>. No data can be sent or captured by reading an XML file, and you can run a program such as WireShark on your web server to confirm this is the only file Click Studio's checks

### X-Forwarded-For Support

---

When Passwordstate adds auditing data to the database, it records the IP Address of the client who initiated an action which triggered the audit event.

As Passwordstate supports the "X-Forwarded-For (XFF) HTTP header field" for identifying the originating IP address of a client, if you use any form of Load Balancing or Proxy Server caching, you may need to make configuration changes to your device/appliance to ensure the correct IP Address of the client is reported, instead of the load balancer or proxy server.

### Syslog Server Details

---

If required, you can send all Auditing data to one of your own internal SysLog servers. It is the Passwordstate Windows Service which checks every minute for new data to send, and the Windows Service keeps track of the latest auditing record which was successfully sent, and only

send subsequent records.

## 29.17 Usage Tracking Tab

The Usage Tracking tab allows you to specify your own JavaScript code to be inserted into the main /default.aspx page.

This is useful if you have your own wiki, or similar, to track page hits for your various web sites.

This feature also provides a few options for where to insert the code on the page - either within the <head> tag, or just before the end of the <body> tag.

## 29.18 User Acceptance Policy Tab

The User Acceptance Policy Tab allows you to specify a popup 'User Acceptance Policy' (UAP) which users must read when they access the Passwordstate web site.

A default body of text is provided, but it can be customized to suite your organization.

There are also a couple of options for the UAP:

- No policy Required
- Yes - Mandatory for each new session (every time your users initiate a new session when they visit the site, they will be presented with the UAP popup)
- Yes - Acceptance Required (Once the user has read and accepted the policy, they will not be prompted again)

## 30 User Accounts

Prior to any of your users being able to access the Passwordstate web site, you must first register their accounts in the User Accounts screen.

There 4 different ways user accounts can be added to Passwordstate, and they are:

- Adding them manually by clicking on the 'Add' button
- Importing them from Active Directory by clicking on the 'Add from AD' button
- Importing them from a csv file by clicking on the Import button
- Or, when membership of an Active Directory Security Groups is synchronized - please see the [Security Groups](#) screen for information on this method

 **Performance Tip:** If you have many Active Directory User Accounts added to Passwordstate, the synchronization features on the [Active Directory Options Tab](#) on the System Settings page will perform significantly better if these user accounts belong to one or more Security Groups, and these Security Groups have also been added to Passwordstate via the page [Security Groups](#). The reason for this performance improvement is because all the users can be enumerated with one call to Active Directory for the Security Group, instead of making separate calls for every single

account. If you have many AD users added to Passwordstate (i.e. 200+), it is recommended you add one or more Security Groups even if you don't use them to apply permissions anywhere.

 **Note 1:** When you first add a user's account to Passwordstate, they will receive an email informing them they have access, and what URL to access the site with - assuming the email notification category is not disabled on the screen [Email Templates](#).

 **Note 2:** If you need to purchase additional Client Access Licenses, you can click on the 'Buy More Licenses' button and it will provide you with some instructions

**User Accounts**

Listed below are all users who have been granted access to Passwordstate.

 Total License Count: **Enterprise (Unlimited)**  Available License Count: **Not Applicable**

Actions	UserID	First Name	Surname	Email	Department	Office	Last Logged In	Date Created	UAP Accepted On	Enabled	Expires
>	<input type="checkbox"/> halo\aaagui	Abigail	Aguilar					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\aaandr	Adrian	Andrade					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\abair	Adrian	Baird					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\abark	Abigail	Barker					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\abass	Adrian	Bass					8/11/2015 10:55 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\abrow	Abigail	Brown					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\administrator				Software Development	Head Office		27/10/2015 3:45 PM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\ahard	Abigail	Hardacre					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\ahend	Abigail	Henderson					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	
>	<input type="checkbox"/> halo\ahoov	Abigail	Hoover					8/11/2015 10:38 AM		<input checked="" type="checkbox"/>	

Page: 1 of 5 Go Page size: 10 Change Item 1 to 10 of 50

Add | Add From AD | Import | Import Local Accounts | Export | Clone User Permissions | Reset Accepted UAPs For All Users | Process Selected Items... | Grid Layout Actions...

Once you have added the user's account to Passwordstate, there are certain functions which can be performed against it.

## Local Login Accounts

When using the Active Directory Integrated version of Passwordstate, it's still possible to create Local Login Accounts, which aren't tied to Active Directory. This would only ever get used in rare circumstances when you have users wanting to use Passwordstate, but don't have an AD Account. In order to take advantage of this feature you need to:

- For the Passwordstate web site in IIS, you need to set the Authentication for the site to 'Anonymous'
- You need to add, or import via a csv file, 'Local Login Accounts' to Passwordstate - these behave similar to Forms-Based accounts

 **Note:** There are some limitations when you configure Passwordstate in this manner. In particular, user's won't be able to set their own Authentication options in the Preferences screen, Security Administrators won't be able to configure any Authentication options for a User Account Policy, and certain System Wide Authentication options will also be disabled.

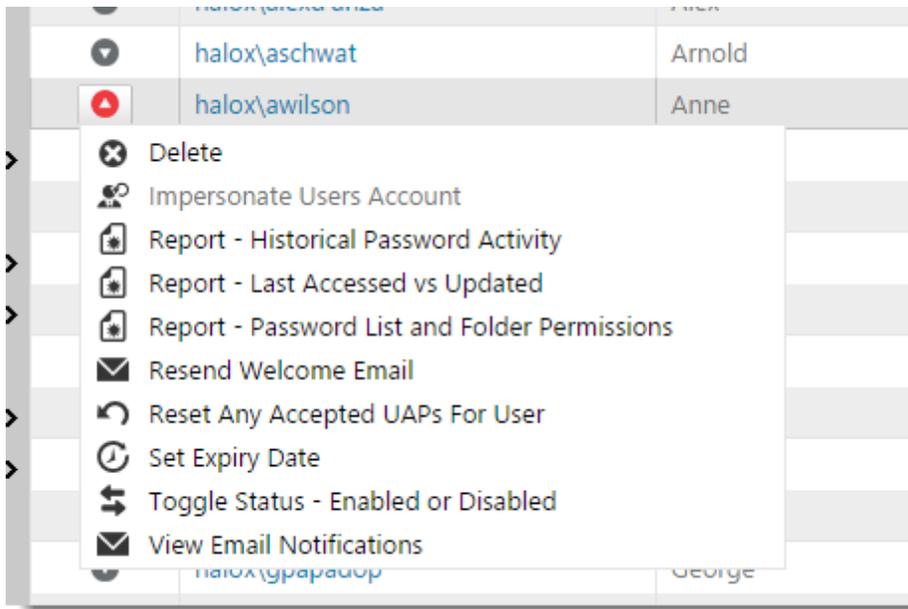
## User Account Actions Menu

The following 'Actions' menu items are available for a user's account:

- **Delete** - deleting a user's account will remove all access for them, so please use with caution
- **Impersonate Users Account** - this feature should only be used when trying to troubleshoot issues with the affected user. By selecting this option, an email will be sent to the user informing them you are "impersonating" them, as well as to all Security Administrators. Audit records are also added. When you are impersonating a user, being able to see, edit or add passwords will be disabled
- **Report - Historical Password Activity** - this report shows all auditing data for the user's account as it relates to password records i.e. viewing passwords, copying to the clipboard, access permissions, etc
- **Report - Last Accessed vs Updated** - this report allows you to see all the password records the user has access to, when they last viewed the value of the password, and when the last time the Password itself was updated. It provides a column called 'Reset Recommended' so you know if a password should be reset after an employee leaves your organization. You either choose to see all records the user has access to, or only the ones where a password reset is recommended
- **Report - Password List and Folder Permissions** - this report will show all the Password Lists and Folders the user has access to, and what their permissions are. The permissions are either based on their own individual user account, or any security groups they may be members of
- **Resend Welcome Email** - if you need to resend the initial Welcome email to the user (the email they first receive when their account is first added to Passwordstate), then you can use this menu item
- **Reset any Accepted UAPs for User** - If needed, it's possible to reset the 'accepted' status of the User Acceptance Policy for a user. The User Acceptance Policy can be configured on the screen [System Settings](#) -> [User Acceptance Policy Tab](#)
- **Set Expiry Date** - it is possible to set a date in which the user's account can either be disabled, or deleted from Passwordstate. This is a useful feature if you know an employee is leaving the organization on a specific date
- **Toggle Status - Enabled or Disabled** - this will either enable or disable the user's account, preventing them from accessing the Passwordstate web site
- **View Email Notifications** - allows you to enable/disable email notifications for the user, assuming an Email Notification Group hasn't been applied to their account

🚩 Note 1 : The status (enabled or disabled) of a user's account may also change depending on the Active Directory synchronization settings on the screen [System Settings](#) -> [Active Directory Options Tab](#)

🚩 Note 2 : Disabling a user's account does not count towards the number of used licenses



## Editing User Account Settings

By clicking on the UserID hyperlink in the grid, you will be directed to a screen where you can edit multiple properties for the user's account.

**Note 1:** Any changes to a user's account will not be in effect until the user logs off, then back in to the Passwordstate web site.

**Note 2:** The Miscellaneous, Email Notifications and Authentication Options tabs are almost identical to what the user sees when they view their own Preferences

**Note 3:** [User Account Policies](#) may override any number of settings for the user, in which case the relevant controls on each of the tabs will be disabled

## Account Details Tab

The Account Details Tab has some basic information about the user's account which you can edit, but should rarely need to be touched.

**Note:** At this stage it's not possible to rename a user's UserID value due to the way this field is encrypted throughout a lot of the tables in the Passwordstate database.

## Edit User Details

To modify the user's details, please make appropriate changes in each of the tabs below and click on the 'Save' button.

Mark Sandford (halox\msand)

account details	miscellaneous	color theme	authentication options	mobile access options
Please specify appropriate accounts details for the user below.				
UserID	halox\msand			
First Name *	<input type="text" value="Mark"/>			
Surname *	<input type="text" value="Sandford"/>			
Email Address	<input type="text" value="testing@clickstudios.com.au"/>			
Department	<input type="text" value="Software Development"/>			
Office	<input type="text" value="Head Office"/>			
Created	24/08/2008 4:49 PM			
Role	 Security Administrator			
Status	 Enabled			
				<input type="button" value="Save"/> <input type="button" value="Cancel"/>

## Miscellaneous Tab

The Miscellaneous Tab has the following settings you can choose for the user:

Password Visibility on Add/View/Edit Pages	When you add a new Password or edit an existing one, by default the password value is masked i.e. ***** If you choose, you can instead show the password value instead of the masked one
Auto Generate New Password When Adding a New Record	When adding a new Password record, you can automatically generate a new random password instead of having to specify one yourself. The format/complexity of the new random password will be determined by which Password Generator Policy is applied to the Password List
Enable Search Criteria Stickiness Across Password Screens	When using the search textbox found at the top of most Password screens, you can choose to make this search value you type sticky across different Password Lists i.e. if you search for 'test' in one Password List, when you click on another Password List in the Navigation Tree, the contents of the Passwords grid will also be filtered by the term 'test'. You can also clear the search criteria by clicking on the  icon
Show the 'Actions' toolbar on the Passwords pages at the	At the bottom of every Passwords grid there are certain buttons/controls for adding passwords, importing them, viewing documents, etc. With this option, you can choose to display the 'Actions' toolbar at the bottom of the Passwords grid, at the top, or both

Use the following type of Navigation Menu system	For the main Navigation Menu system, you can choose to use whatever the default settings are in Passwordstate, or you can choose the Vertical or Horizontal menu system for the user
Expand bottom Navigation Menu items by	The Navigation Menu at the bottom of the screen can expand certain menus vertically by simply hovering over them. If you choose, you can change this option so you must first click on the Menu item before it expands
On all Password List screens, sort the grid by the following column	If you would like all Password grids to be sorted by default on a selected column, you can choose the column here. Note: this will override you manually sorting a column and then selecting the save the Grid layout
On the Passwords Home and all Folder screens, sort the Search Results and Favorite Passwords grids by the following column	Similar to the option above, but this sort order applies to the Search Results and Favorite Passwords grids on the Passwords Home page and and Folder pages
When creating new Shared Password Lists, base the settings on the following Template's settings	When creating new Password Lists, you can choose to automatically specify all the settings based on one of the Templates you select here
When creating new Shared Password Lists, base the permissions on the following Template's permissions	When creating new Password Lists, you can choose to automatically base all the permissions on one of the Templates you select here
Locale (Date Format)	Allows you to specify a date format for any date fields - you may need different format based on your region, compared to that of what Passwordstate is current set to use system wide

## Edit User Details

To modify the user's details, please make appropriate changes in each of the tabs below and click on the 'Save' button.

Mark Sandford (halox\msand)

account details	miscellaneous	color theme	authentication options	mobile access options
Please select which of the following miscellaneous options within Passwordstate you would like to enable for the user.				
<b>Password Visibility on Add/Edit Pages:</b> <input type="radio"/> Visible <input checked="" type="radio"/> Mask				
<b>Auto Generate New Password When Adding a New Record:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No				
<b>Enable Search Criteria Stickiness Across Password Screens:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No				
<b>Show the 'Actions' toolbar on the Passwords pages at the:</b> <input checked="" type="radio"/> Bottom <input type="radio"/> Top <input type="radio"/> Bottom & Top				
<b>Use the following type of Navigation Menu system:</b> <input checked="" type="radio"/> Use System Wide Menu System <input type="radio"/> Vertical Menu System <input type="radio"/> Horizontal Menu System				
<b>Expand bottom Horizontal Navigation Menu items by:</b> <input checked="" type="radio"/> Hovering over it <input type="radio"/> Clicking on it				
<b>On all Password List screens, sort the grid by the following column:</b> <input type="text" value="Do not sort by default"/>				
<b>On the Passwords Home and all Folder screens, sort the Search Results and Favorite Passwords grids by the following column:</b> <input type="text" value="Do not sort by default"/>				
<b>When creating new Shared Password Lists, base the settings on the following Template's settings:</b> <input type="text" value="HR Template"/>				
<b>When creating new Shared Password Lists, base the permissions on the following Template's permissions:</b> <input type="text" value="Do not use template"/>				
<b>Locale (Date Format):</b> <input type="text" value="Use System Wide Locale Setting"/>				
				<input type="button" value="Save"/> <input type="button" value="Cancel"/>

## Color Theme Tab

The Color Theme Tab allows you to customize the colors for Passwordstate.

You can use the default colors as specified by you Passwordstate Security Administrator(s), or you can pick your own.

 **Note:** The Security Administrators of Passwordstate can use a feature called 'User Account Policies', which may override any settings you specify here.

### Edit User Details

To modify the user's details, please make appropriate changes in each of the tabs below and click on the 'Save' button.

Mark Sandford (halox\msand)

account details   miscellaneous   **color theme**   authentication options   mobile access options

Use the System Wide color theme, or choose a different one for the user:  
 System Wide    Choose My Own

**Base Color**  
Please select the Base Color to use throughout Passwordstate.

**Color Palette**  
Apex

**Base Color:**  
#ffffff

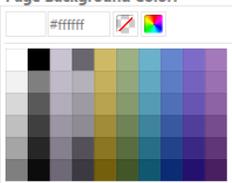


**Page Background Color**  
Please select the Page Background Color to use throughout Passwordstate.

**Color Palette**  
Apex

**Note:** It is recommended you use white or light background colors for better readability.

**Page Background Color:**  
#ffffff



Save   Cancel

## Authentication Options Tab

The Authentication Options Tab allows you to:

- Specify which Authentication Option should be used for the user's account - details and screenshots for each of the different authentication options can be found on the screen [System Settings](#) -> [Authentication Options Tab](#)
- Specify SecurID and AuthAnvil account details
- Create/clear/email the user their ScramblePad Pin number
- Create/clear/email the user their Google Authenticator Secret Key

## Edit User Details

To modify the user's details, please make appropriate changes in each of the tabs below and click on the 'Save' button.

Mark Sandford (halox\msand)

account details   miscellaneous   color theme   authentication options   mobile access options

Please select the preferred Authentication Option for the user for accessing the Passwordstate web site.

**Please Note:** You only need to specify the relevant authentication settings below if one of the available Authentication options has been applied to the users account, or if they have selected a secondary authentication option for a Password List they have access to.

**Web Authentication Option**

Please specify which Authentication option which will apply to this user when they first authenticate to Passwordstate.

**Choose Authentication Option:**

Use the System Wide Authentication Settings

**Please Note:** When using the default Passthrough authentication method, the only true way to expire a user's login credentials after logging out is to close the browser window. Clicking on the 'Log Back In' button, or refreshing the page, simply re-authenticates the user. Please make your users aware of this if they log into Passwordstate from different computers to their own.

**ScramblePad Pin Number**

If you have chosen to use ScramblePad Authentication, please specify a Pin Number for the user to use.

**ScramblePad Pin Number:**     (Minimum length is : 4)

**SecurID UserID**

Please specify the user's SecurID UserID value below.

**SecurID UserID:**

**AuthAnvil Username**

## Mobile Access Options Tab

The Mobile Access Options tab allows you to specify various Mobile Client settings for the user, and to also set their Mobile Pin Number for them if required. The Pin Number can then be emailed to their account.

 Edit User Details

To modify the user's details, please make appropriate changes in each of the tabs below and click on the 'Save' button.

Mark Sandford (halox\msand)

account details   miscellaneous   color theme   authentication options   mobile access options

Please select the user's options below for accessing Passwordstate via a mobile device.

**Set the Mobile default home page to:**

Password List Search    Password Search

**When searching for Password Lists or Passwords, limit the number of records displayed to:**  
 (as mobile devices typically operate on slower networks, limiting the number of records returned can help improve performance)

**Mobile Pin Number:** 

(Minimum length is : 4)

## Clone User Permissions

It's possible to clone one user's permissions to another, by using the 'Clone User Permissions' feature. This feature is generally used in one of two ways:

- You've had a new employee start who has replaced another employee, and you wish to give them the same access
- If you need to modify the UserID for a user i.e. a Domain Migration, someone gets married, etc.

 **Note 1:** When cloning occurs, the Destination User's permissions are first removed – otherwise duplication would occur

 **Note 2:** You need to decide if the Source user's Private Password Lists should be moved across to the Destination user. This should only ever be done if the Source and Destination user are the same actual person. The reason we provide the option to move a user's Personal Password Lists, is because a user's Personal Password Lists are deleted if their account is removed from Passwordstate

 **Note 3:** Active Directory Security Group Memberships will not be cloned with this process, as you need to manage these memberships within Active Directory.

During the cloning process, the following types of permissions will be cloned:

- Any Blocked Email Notification settings
- Any memberships to Email Notification Groups
- Any Favorite Passwords
- Any of the 'Features' permissions for what menus the user is allowed access to at the bottom of the screen
- Any Grid Settings – which columns to see, width, etc.

- Any permissions to Password Lists (auditing records are added)
- Any Password Permissions (auditing records are added)
- Any permissions to Password Lists Templates (auditing records are added)
- Any Security Admin Roles (auditing records are added)
- Any membership to Local Security Groups (auditing records are added)
- The expand/collapse status of the Password Lists Navigation Tree
- Any User Account Policy permissions
- Any Scheduled Reports

## 👤 Clone User Permissions

To clone permissions for a user, you need to select the Source and Destination users below, then click on the 'Clone' button.

**Please Note 1:** Please refer to the Security Administrators' manual for what processing occurs when you clone a user's permissions.

**Please Note 2:** Active Directory Security Group Memberships will not be cloned with this process, as you need to manage these manually.

clone permissions

Do you wish to move any Personal Password Lists from the Source User to the Destination User:

Yes  No

**Source Users**

Filter ...

- Amanda Ford (halox\aford)
- Arnold Scwhat (halox\aschwat)
- Anne Wilson (halox\awilson)
- Brett Hales (halox\bhales)
- Bill Sandford (halox\bill sandford)
- Click Studios (halox\clickstudios)
- Catherine Smithers (halox\csmith)
- Felicity Banks (halox\fbanks)
- Fiona Case (halox\fcase)
- Francis Milligan's (halox\fmilligans)
- Greg Monty (halox\gmonty)
- George Papadopolis (halox\gpapadop)
- Graham Saunders (halox\gsaunders)

**Destination Users**

Filter ...

- Amanda Ford (halox\aford)
- Arnold Scwhat (halox\aschwat)
- Anne Wilson (halox\awilson)
- Brett Hales (halox\bhales)
- Bill Sandford (halox\bill sandford)
- Click Studios (halox\clickstudios)
- Catherine Smithers (halox\csmith)
- Felicity Banks (halox\fbanks)
- Fiona Case (halox\fcase)
- Francis Milligan's (halox\fmilligans)
- Greg Monty (halox\gmonty)
- George Papadopolis (halox\gpapadop)
- Graham Saunders (halox\gsaunders)

Status:

Clone Permissions Cancel

## Reset Accepted UAPs for All Users

It's also possible to reset the status of accepted User Acceptance Policies for your users as well. It's possible you will want to do this periodically, as you may need to modify the policy based on

business requirements. Resetting this accepted value means the user will be prompted again to read and accept the updated policy - assuming you have this option enabled on the System Settings [User Acceptance Policy Tab](#). In the User Accounts grid as well, you can see the data and time each of the users last accepted the User Acceptance Policy.

## 31 User Account Policies

User Account Policies allow you to manage a specific set of settings for a groups of users at a time. The settings relate to various User Preferences, and how the Password Lists, Password Folders and Home Page screens appear to the user.

An example of how User Account Policies can be used is to hide all graphs on all screens from the users.

When a User Account Policy is applied to a user's account, the controls/settings on the screen will be disabled, informing the user a User Account Policy is in effect for their account.

### Adding a User Account Policy

When you add a User Account Policy, you can choose to set any number of the following settings:

#### User Preferences

Mask Password Visibility on Add/View/Edit Pages
Auto Generate New Password When Adding a New Record
Enable Search Criteria Stickiness Across Password Screens
Show the 'Actions' toolbar on the Passwords pages at the
Expand the bottom Navigation Menu items by
Locale (Date Format)
Specify which Authentication option will apply to the user's account

#### Password List Screen Options

Show the 'Header' row on all Passwords Grids
Show the 'Filter' controls in the Header of the Passwords Grids
Show the 'Header' row on all Recent Activity Grids
Make the Recent Activity Grid visible to the user
Selects the Paging Style controls for Password and Recent Activity grids
Make the Pie Charts visible to the user
Sort the grid by the following column

#### Home Page and Folder Screen Options

Show the Favorites Passwords Grid
Show the Password Statistics Chart
Choose the Style of the Password Statistics Chart

Stack the data points on top of each other for the Password Statistics Chart

Select the color theme for the Password Statistics Chart

Sort the Search Results and Favorite Passwords grids by the following column

### Mobile Access Options

Set the Mobile default home page to

When searching for Password Lists or Passwords, limit the number of records displayed to

### Password List Options

When creating new Shared Password Lists, base the settings on the following Template's settings

When creating new Shared Password Lists, base the permissions on the following Template's permissions

If copying settings from a Template to a Shared Password List, also link them

When creating new Private Password Lists, base the settings on the following Template's settings

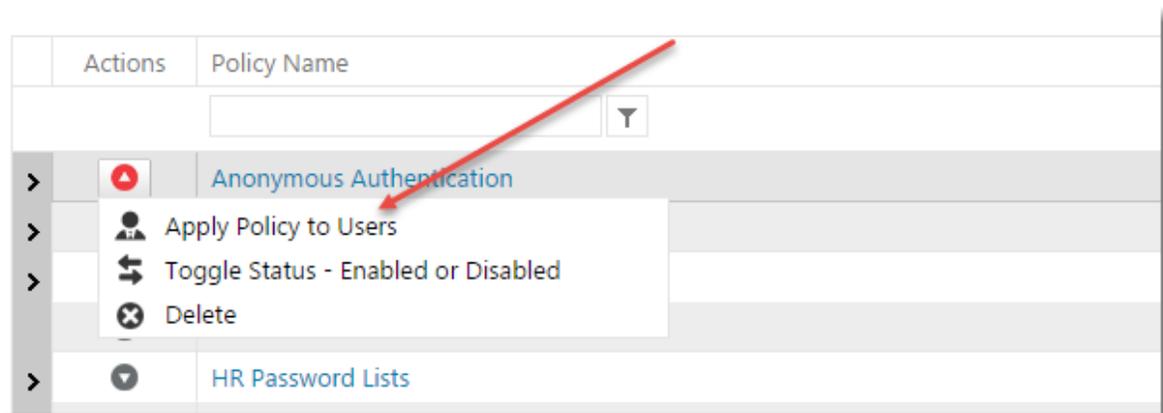
If copying settings from a Template to a Private Password List, also link them

 Note: When you first add a new User Account Policy, it is disabled by default. It is recommended that before you enable the policy, you apply the permissions required, then click on the 'Check for Conflicts' button. The Check for Conflicts process will ensure that there are no two settings with different values assigned to a user's account - this could cause confusion for the user, and for Security Administrators if this is the case.

## User Account Policy Actions

Once you have created a Policy with the desired settings, the following Actions Menu items are available to you:

- Apply Policy to Users - allows you to assign the selected policy to a group of users, or security groups
- Toggle Status - either enable or disable the policy
- Delete - delete the policy



## Check For Conflicts

---

As it's possible to apply more than one User Account Policy to a user's account, or a security group, it is recommended that you use the 'Check for Conflicts' button to determine if this is the case - it would cause confusion if different values for the same settings were being applied via different policies.