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Introduction

This documentation details the Thycotic One single-sign-on and Cloud Manager cross-product cloud administration systems.

Note: Navigate using the dynamic table of contents on the left, the page contents on the right, or by entering a search term above. Many pages in this documentation have sub-pages. The container (parent) pages can have introductory text or simply a heading with no text. Please click the table of contents on the left to see any sub-pages it might have.

We suggest starting with <u>Understanding the Cloud Manager Dashboard</u>.

Documentation

- Thycotic Documentation Portal: You are at the home page of the current Thycotic Document Portal for Thycotic One and Cloud Manager. It contains:
- Converted knowledge base articles. These are marked as deprecated in the legacy knowledge base.
- Links to legacy knowledge bases article that have yet to be converted or retired
- Links to legacy PDF documentation
- New material
- <u>Knowledge Base Articles</u>: Use the Search text box at the top of the page. This is the legacy platform that we are replacing with the Thycotic Documentation Portal (where you are right now). This portal does not yet contain all documentation. For now, there are many locations here where this online documentation links to legacy documentation.

Help

- Document Conventions
- Self-Help Resources
- Technical Support
- Forum (legacy-replaced by Secret Society)
- Thycotic Secret Society: An Educational Community, replacing the Forum.



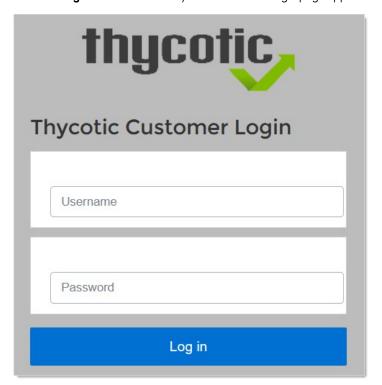
Cloud Manager General Procedures

Note: If you are already logged on your Secret Server Cloud (SSC) domain, you can also access Cloud Manager by going to **Admin > Cloud Subscriptions**, rather than completing this procedure. Click the **Thycotic Cloud Portal** link.

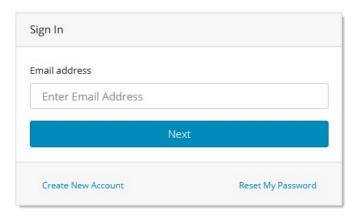
1. In a Web browser, navigate to the Secret Server Cloud (SSC) portal at https://portal.thycotic.com. The Log on page appears:



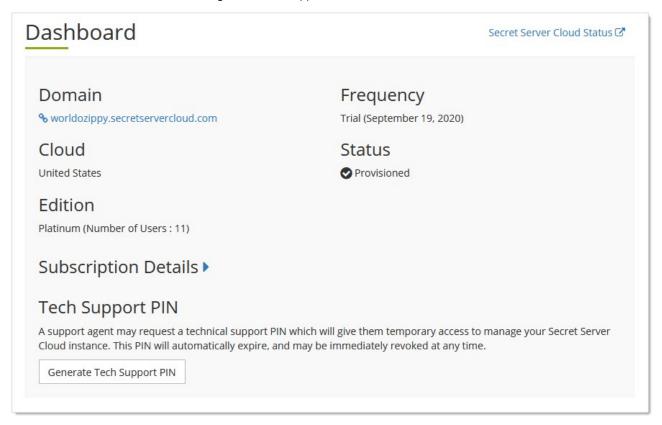
2. Click the **Sign In** button. The Thycotic Customer Login page appears:



- 3. Scroll down to the Other Login Options section.
- 4. Click the button for your Secret Server Cloud (SSC). We chose Thycotic One US East. The Sign In page appears:



- 5. Type your email address in the **Email Address** text box.
- 6. Click the **Next** button. The Password text box appears.
- 7. Type your password in the **Password** text box.
- 8. (Optional) Click to select the **Remember Me** check box if you want your log on credentials to be remembered on this computer. Only do this on secure computers that only you have access to.
- 9. Click the **Next** button. Your Cloud Manager dashboard appears:

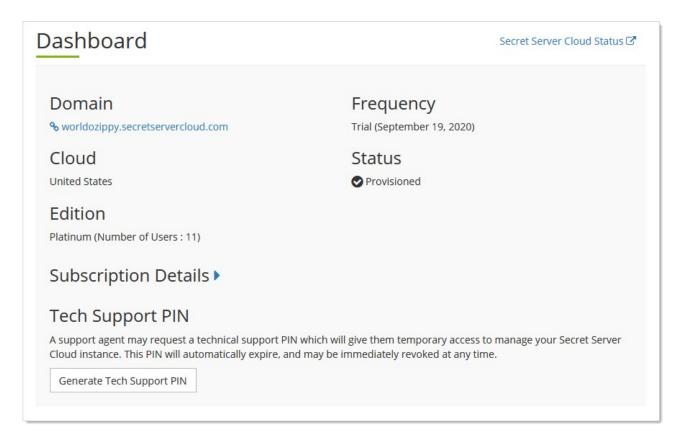


Note: See <u>Understanding the Cloud Manager Dashboard</u> for details.

10. Click the Manage link at the top right of the page and select Teams. The Teams page appears:



The Teams page is the management page for Cloud Manager. Teams are a way to divide up your management into product instances, such as SSC or Privilege Manager, that have separate privileges, users and organization. (See <u>Teams</u>).



The Cloud Manager dashboard provides and overview of your cloud instance. It provides:

- **Cloud**: The parent cloud of your instance.
- **Domain**: The name of and a link to your cloud instance
- Edition: A summary of your license status and number of users.



- **Frequency**: Expiration status and subscription renewal frequency.
- Secret Server Cloud Status: The status of all the Thycotic clouds and related components. It also includes their state history. See <u>Viewing Cloud Status</u>
- **Subscription Details**: A dropdown that shows the details for each cloud product that you own, including the number of licenses and the expiration dates.
- **Status**: The current state of your cloud instance:
 - Canceled
 - Provisioned
 - o Provisioning in Progress...
 - o Error During Provisioning
 - o Not Provisioned.
- Tech Support PIN: A generator for a PIN that you will need if you choose to contact our technical support. See <u>Technical Support</u>.



Cloud Manager Teams

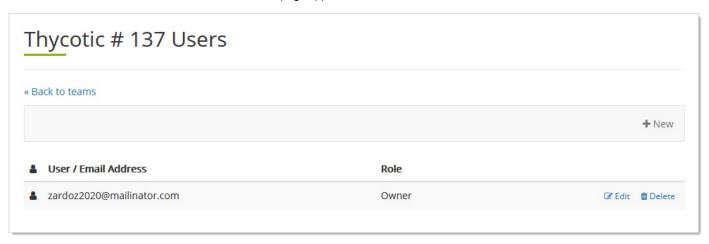
Teams are a feature of Cloud Manager that controls access to Cloud Manager features. For example, they determine who can:

- See a subscription or product
- Generate technical support PINs
- Provision cloud instances
- Change hostnames

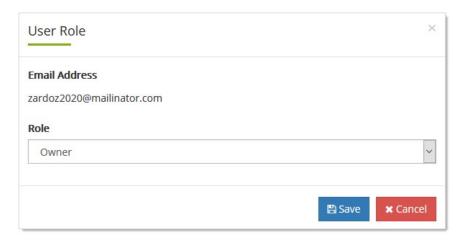
Generally, teams apply to admins, not regular users. You might have more than one team if you have multiple subscriptions (SSC instances) or products (other Thycotic Cloud products). Thycotic One organizations each belong to a single Cloud Manager team.

Note: Please see <u>Thycotic One Organizations</u> to contrast with teams. Teams apply to Cloud Manager and organizations apply to Thycotic One. Team ownership of specific organizations bridge the two.

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the **Edit** button for the desired team. A popup appears.
- 4. Type the desired name in the Name text box.
- 5. Click the Save Changes button.
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the Manage link on the dashboard. The Teams page appears.
- 3. Click the **Users** button for the desired team. A Users page appears:



4. Click the **Edit** button. The User Role popup appears:



- $5. \ \, \text{Click the } \textbf{Role} \, \text{dropdown list to select the role for the team's users.} \, \text{See} \, \underline{\text{Team Roles}} \, \text{for more on roles}.$
- 6. Click the **Save** button.

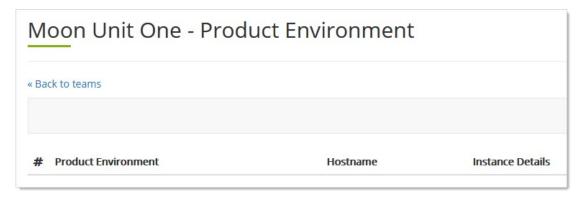


Products are Thycotic cloud products other than SSC, such as Privilege Manager Cloud, DevOps Secrets Vault, and Account Lifecyle Manager. Subscriptions are essentially the exact same thing for SSC.

Note: The reason there are two names for nearly the same thing is they came from separate legacy development paths. We intend to combine them in a future Cloud Manager release.

Viewing Team Products

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the Manage link and select Teams. The Teams page appears.
- 3. Click the **Products** button for your desired team. The Product Environment page appears:





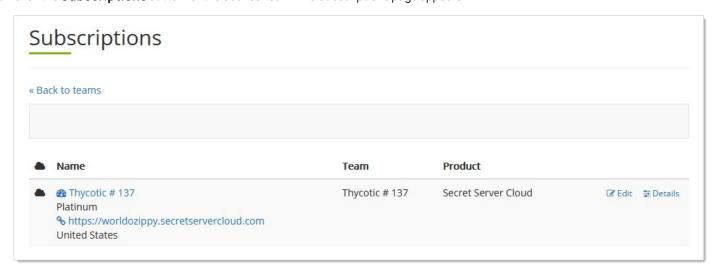
Subscriptions are SSC instances. Products are essentially the exact same thing for Thycotic cloud products other than SSC, such as Privilege Manager Cloud, DevOps Vault, and Account Lifecyle Manager.

Note: The reason there are two names for nearly the same thing is they came from separate legacy development paths. We intend to combine them in a future Cloud Manager release.

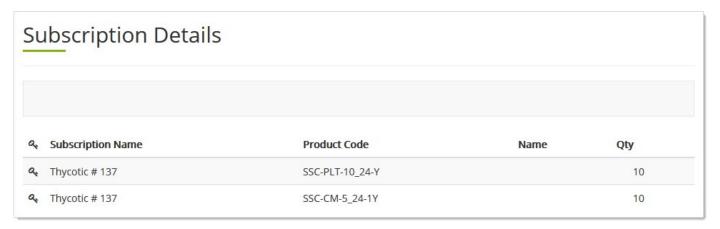
Viewing and Editing Team Subscriptions

Note: The Cloud Manager dashboard provides a much quicker way to view team subscriptions.

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link and select **Teams**. The Teams page appears.
- 3. Click the **Subscriptions** button for the desired team. The Subscriptions page appears:



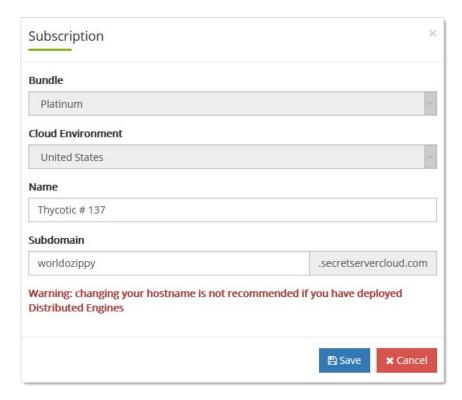
4. To view a list of the cloud subscriptions, click the Details button. The Subscriptions Details page appears:



We see that the team is listed under Subscription Name, and the subscriptions are for SSC Connection Manager and the SSC platform.

5. To edit the subscriptions, click the **Edit** button. The Subscription popup appears:





6. If desired, type the new hostname in the **Name** text box.

Important: If you change the cloud hostname, any distributed engines you have connected to your cloud instance will continue to contact the old hostname. Any distributed engine functionality, like password changing and discovery, will no longer work. To fix this, uninstall, re-download, and reinstall any distributed engines you have deployed.

- 7. If desired, type the new subdomain name in the **Subdomain** text box.
- 8. Click the Save button.

Editing the Subdomain

See Viewing and Editing Team Subscriptions.

Linking to an Instance

Listing Cloud Subscriptions

See Viewing and Editing Team Subscriptions.

Listing Hostnames

See Viewing and Editing Team Subscriptions.



Roles and their permissions:

Billing Manager Role and Permissions

Billing manager is a legacy role that is no longer used. It will be removed in a later version of Cloud Manager. Its related Billing Management privileges are also no longer valid.

Bundle Management Permissions

The bundle management permissions are legacy and no longer used. They will be removed in a later version of Cloud Manager

Owner

- Product Administration (Full)
- Team Administration (Full)
- Team Administration (Read)
- Team Administration (Write)
- User Management (Full)
- User Management (Read)
- User Management (Write)

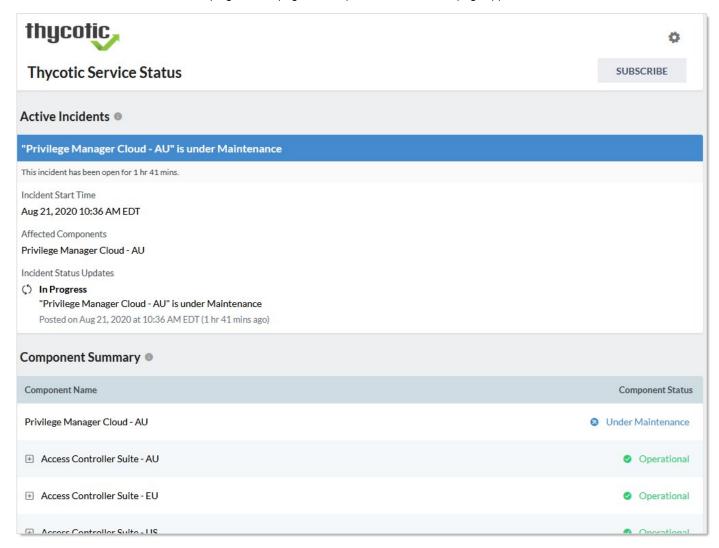
Technical Manager

- Team Administration (Full)
- Team Administration (Read)
- Team Administration (Write)



Cloud Status

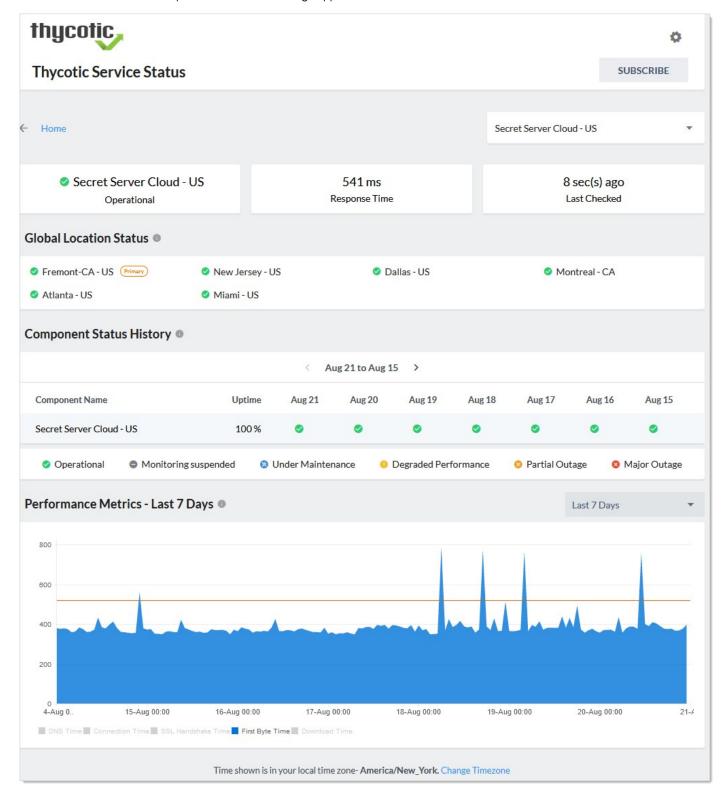
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the Manage link and select Teams. The Teams page appears.
- 3. Click the Cloud Status link at the top right of the page. The Thycotic Service Status page appears:



- 4. The page has these sections:
 - Active Incidents: Unresolved incidents, including maintenance. Includes severity and real-time updates.
 - Component Summary: Operation status of various Thycotic services. Click the + to see subcomponent broken out.
 - **Component Status History**: A collection of the operational statuses of Thycotic service projected over the last three months. Includes a calculated uptime percentage for each.
 - Upcoming Maintenance Next 31 days: Details about any scheduled downtime on the Thycotic service in the next 31 days.
 - o Incident History: A list of resolved incidents and competed maintenance in the last seven days.

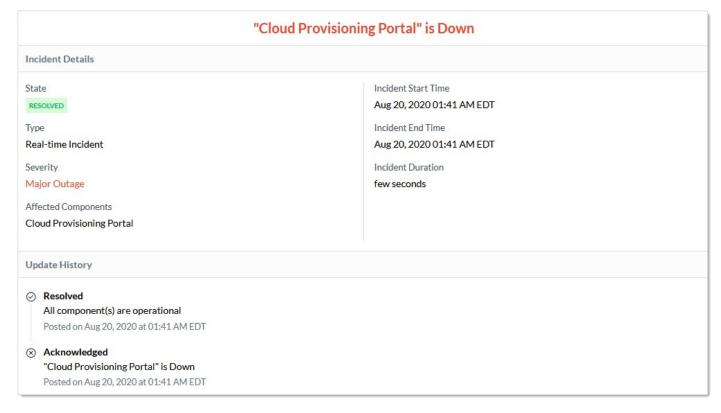


5. Click any service component or subcomponent (in the Component Summary and Component Status History sections) to view additional information. The Thycotic Service Status Page appears:



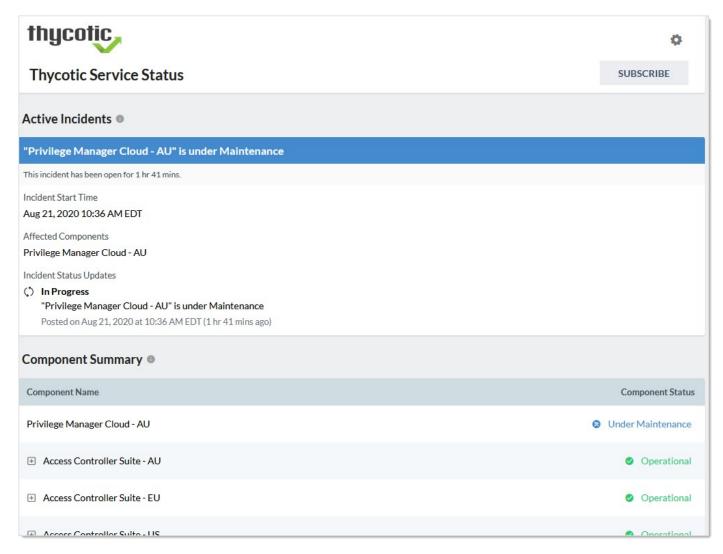


- 6. Make adjustments as desired:
 - o Click the unlabeled service dropdown list at the top right to change the service without leaving the page.
 - Click the < or > icons on the Component Status History table to adjust its time window.
 - o Click the Change Time Zone link at the bottom of the page or the gear icon at the top of the page to change the time zone.
- 7. Operate the **Performance Metrics** graph:
 - Click the **Performance Metrics** dropdown list to move the time window shown.
 - o Click the check boxes at the bottom to add or remove metrics from the graph. You can view:
 - Connection Time
 - DNS Time
 - Download Time
 - First Byte Time
 - SSL Handshake Time
 - Hover the mouse pointer over the graph to see a popup showing that metric at specific time on the graph.
- 8. In the **Incident History** section, click the incident title to see details about the incident:



Cloud Alert Subscriptions

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link and select **Teams**. The Teams page appears.
- 3. Click the Cloud Status link at the top right of the page. The Thycotic Service Status page appears:

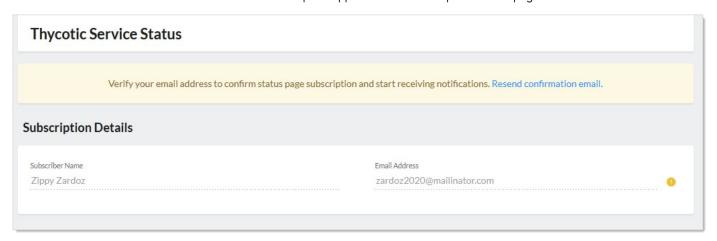


4. Click the Subscribe button at the top of the page. A subscription popup appears:

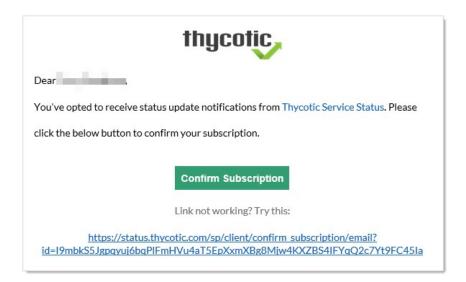




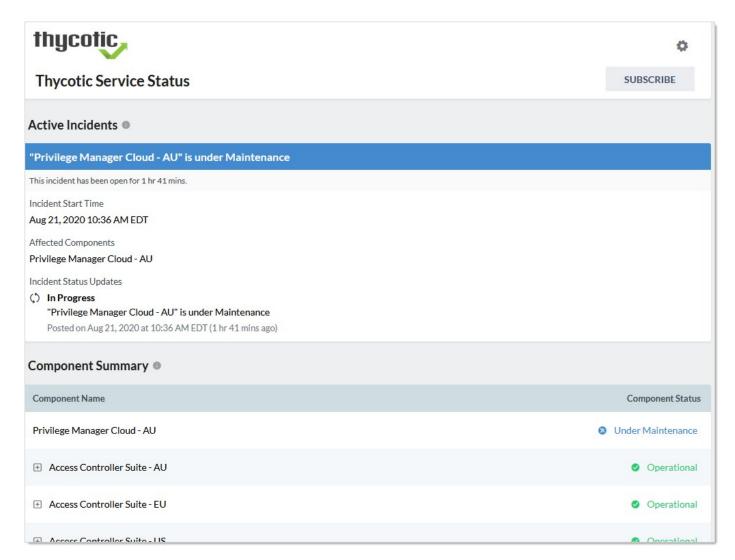
- 5. **Either** click the **Email** tab to have the alerts sent to an email. **Or** click the **SMS** tab to have text message alerts sent. **Or** click the **RSS Feed** tab to create an RSS feed file for alerts. Using this, you can create a status feed on your status page.
- 6. Click the **Subscribe to Alerts** button. The new subscription appears in the Subscription Details page:



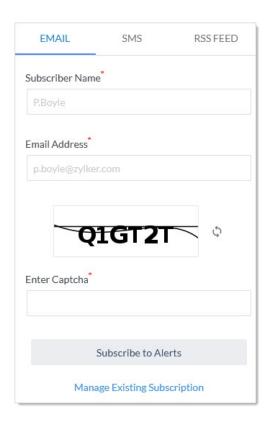
7. Click the **Confirm Subscription** button to confirm the subscription on your phone or via email when the message arrives:



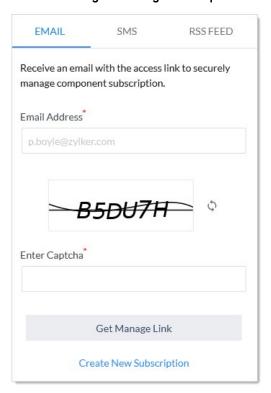
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link and select **Teams**. The Teams page appears.
- ${\it 3. Click the \textbf{Cloud Status} link at the top right of the page. The Thycotic Service Status page appears:}\\$



4. Click the Subscribe button at the top of the page, either on the main page (receive all alerts) or on one of the components. A subscription popup appears:



5. Click the **Manage Existing Subscription** link.



6. Type the email address for the subscription management link to be sent to in the **Email Address** text box.



- 7. Complete the captcha.
- 8. Click the ${\bf Get\ Manage\ Link}$ button. A confirmation page appears.
- 9. Confirm the subscription on your phone or via email when the message arrives.



Thycotic One Organizations

A Thycotic One *organization* is a group of users and application credentials. Each organization is subordinate to a single Cloud Manager team. Owners or technical managers in a team can administer that team's organizations. Organization admins can configure log on behavior for all their end users. They can create new application credentials, set password strength policies, set 2FA requirements, trigger password resets for their users, and more.

Note: Any user that is added to Thycotic One using application credentials that belong to an organization are automatically added to that organization.

Note: Please see <u>Cloud Manager Teams</u> to contrast with organizations. Teams apply to Cloud Manager and organizations apply to Thycotic One. Team ownership of specific organizations bridge the two.



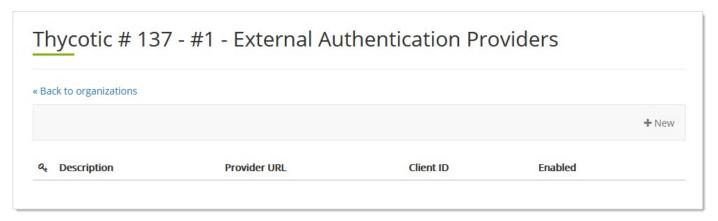
Adding External Authentication Providers

Thycotic One supports external OpenID Connect authentication providers. During a user's login, if an organization has configured one or more external providers, the user will be prompted to select which provider to use, or to log in with a Thycotic One account password.

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the Manage link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:

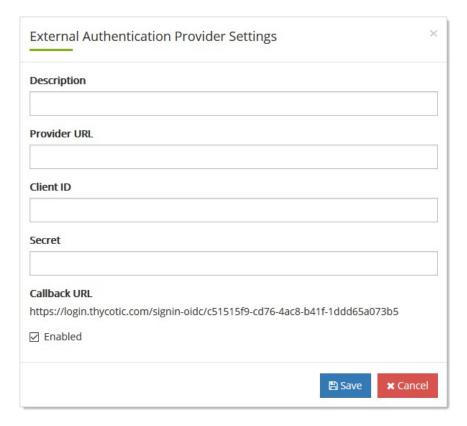


4. Click the Auth Providers button for the desired organization. The External Authentication Providers page appears:



5. Click the + New button. The External Authentication Provider Setting popup page appears:





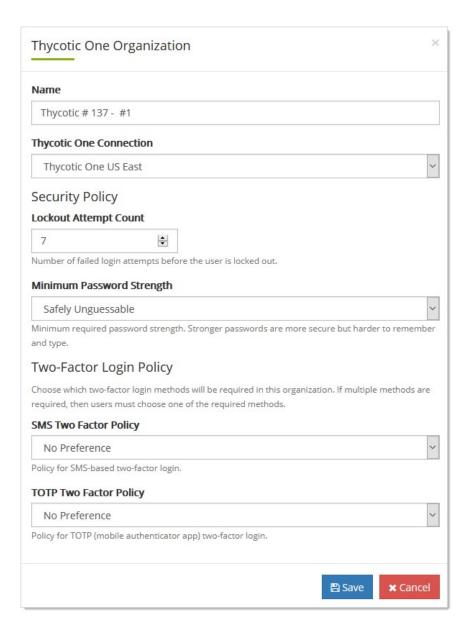
- 6. Type in the parameters for your desired provider.
 - **Description** is a display name.
 - **Provider URL** is the OpenID Connect base server URL of the external provider. Specifically, this must be a publicly accessible URL from which the OpenID Connect configuration document can be fetched. For example, if the OpenID Connect configuration document is available at https://example.com/.well-known/openid-configuration, then this setting should be set to https://example.com.
 - Client ID and Secret are the credentials used to connect to and authenticate with the provider.
 - Callback URL is the redirect URI required to complete the OpenID Connect login process. In most cases, the external provider must be configured to allow this specific URL.
- 7. Click to select the **Enabled** check box. You can deselect it if you wish to enter the authentication provider without using it yet.
- 8. Click the Save button.

Editing Organization Settings

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



4. Click the **Edit** button. The Organization page appears:



- 5. Name and cloud region:
 - Edit the name in the **Name** text box.
- 6. Log on security:
 - Click the Lockout Attempt Count list to select the number of log on tries a user is allowed before being locked out.
 - o Click the **Minimum Password Strength** dropdown list to choose the password robustness to enforce.
- 7. Two-Factor authentication: Click the TOTP Two Factor Policy to enforce a time-based one-time password setup.
- 8. Click the Save button.

Setting the Lockout Policy

See Editing Organization Settings.



Setting the Multifactor Authentication Policy

See Editing Organization Settings.

Setting the Password Policy

See Editing Organization Settings.

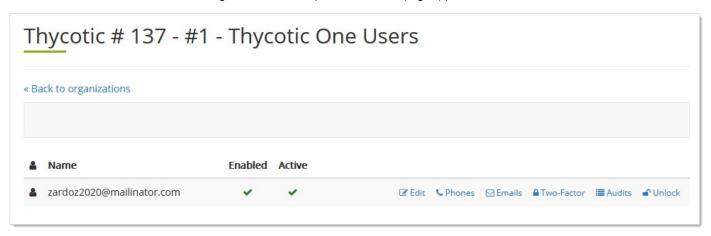


Auditing Users

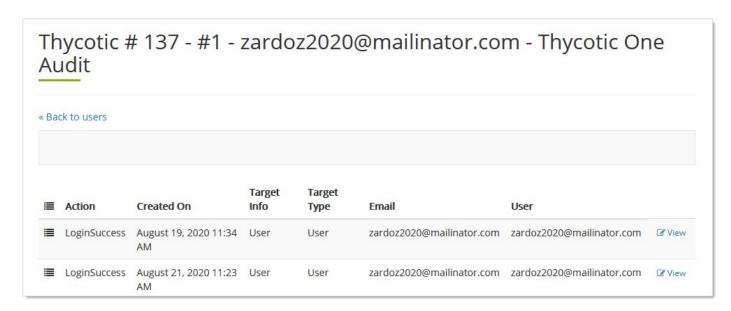
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



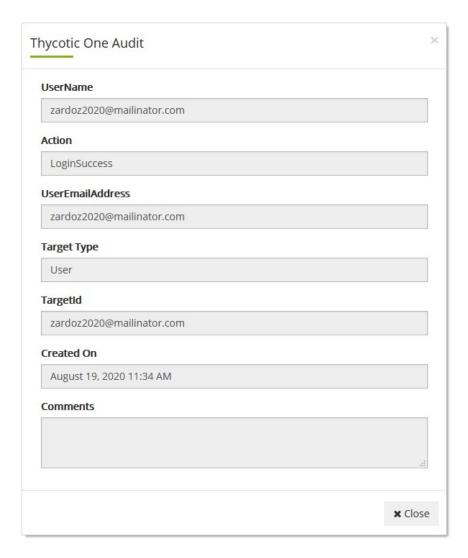
4. Click the Users button for the desired organization. The Thycotic One Users page appears:



5. Click the **Audits** button for the target user. An audit of the user's activity appears:



6. Click the ${\bf View}$ button to the right an audit action to see details:



Configuring Multifactor Authentication

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the ${\bf Manage}$ link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:





4. Click the **Users** button for the desired organization.

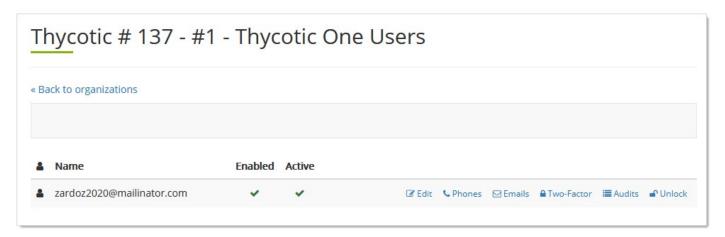
Editing Organization Users

Task 1: Edit General Settings

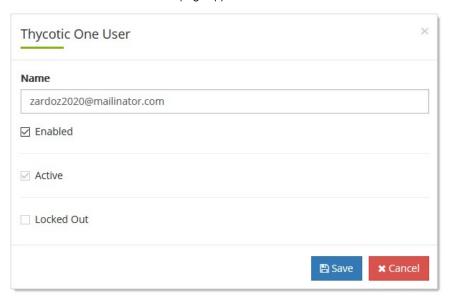
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



4. Click the Users button for the desired organization. The Thycotic One Users page, which lists all the users, appears:



5. Click the **Edit** button. The user's page appears:



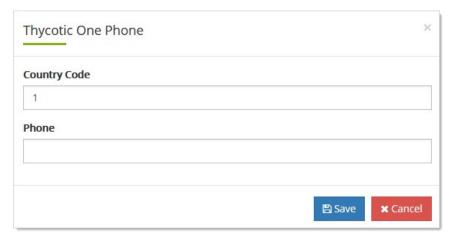
- 6. Edit the following as desired:
 - Name: This is the user's email address or other display name.
 - **Enabled**: Allows you to toggle a user's access without having to reenter the user later.
 - Active: Read only. This is a flag that indicates if a user has ever logged on.
 - Locked Out: Read only. Toggle the setting on the user row on the users table.
- 7. Click the **Save** button. You are returned to the Users page.

Task 2: Setting Phone Numbers

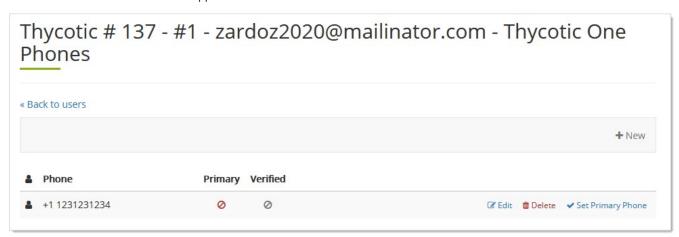
1. Click the **Phone** button next to the desired user on the User page. That user's Phones page appears:

Thycotic # 137 - #1 - zardoz2020@mailinator.com - Thycotic One Phones «Back to users + New Primary Verified

- 2. New phone numbers:
 - 1. Click the + **New** button. A popup appears:



- 2. Type the phone parameters in the text boxes. No not include hyphens or parentheses.
- 3. Click the **Save** button. The number appears in the Phones list:



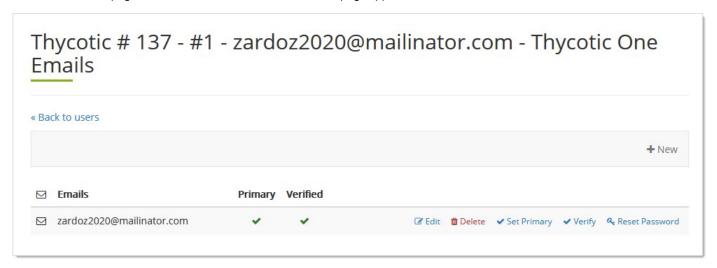
Note: Verification occurs when the user logs on Thycotic One and and goes to the Phone page to run a verification.



- 3. Existing phone numbers:
 - Click the **Edit** button to change the number.
 - o Click the **Set Primary Phone** button to toggle the phone as the user's main phone.
 - Click the **Delete** button to remove the phone number.
- 4. Click the Back to users link to return to the Users page.

Task 3: Setting Email Addresses

1. Back on the **Users** page click the **Emails** link. The user's Emails page appears:



2. Existing email addresses:

- Click the **Edit** button to change the address.
- Click the **Set Primary** button to toggle the email address as the user's main one.
- Click the **Verify** button to send a verification email to the user. When the user verifies a green checkmark appears.
- Click the **Reset Password** button to send the user a password reset email.
- Click the **Delete** button to remove the phone number.
- 3. New email addresses:
 - 1. Click the + New button. A popup appears for you to type the address.
 - 2. Click the **Save** button. The new address appears in the table as unverified.
 - 3. Click the Verify button to send a verification email to the user. When the user verifies a green checkmark appears.
 - 4. Click the **Edit** button to configure the user.

Task 4: View Two-Factor Authentication Status

 $\textbf{Note:} \ \ \textbf{This is an organization-level parameter, which is why it is read only.}$

1. Back on the Users page click the Two-Factor button. The Thycotic One Two-Factor Authentication page appears:



2. Click the Back to users link to return to the Users page.

Enabling Thycotic One Users

See Editing Organization Users.

Listing Thycotic One Users

See Editing Organization Users.

Setting Phone Numbers and Email

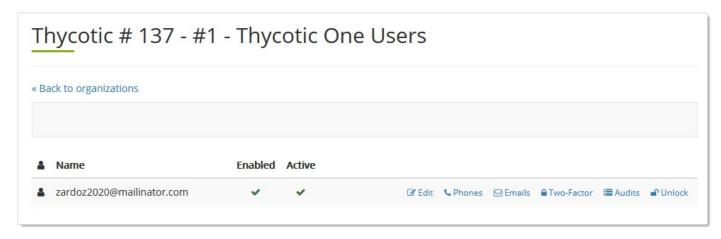
See Editing Organization Users.

Unlocking a User Account

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



4. Click the Users button for the desired organization. The Thycotic One Users page, which lists all the users, appears:



5. Click the **Unlock** button to unlock the account.



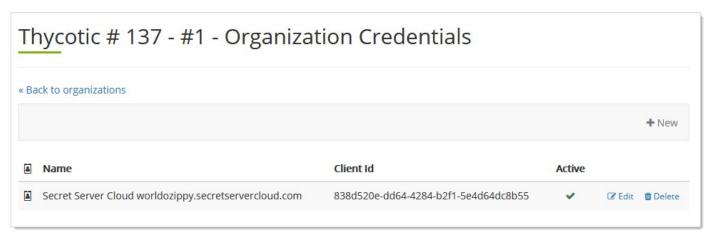
An application credential is an OpenID Connect client ID and client secret that applications, such as Secret Server Cloud, use to connect to Thycotic One and authenticate against it. Credentials can also push user accounts into Thycotic One. For example, SSC syncs its user account list with Thycotic One when that option is enabled. All those users belong to the original organization, which is set up for them when they provision the instance.

Editing Credentials

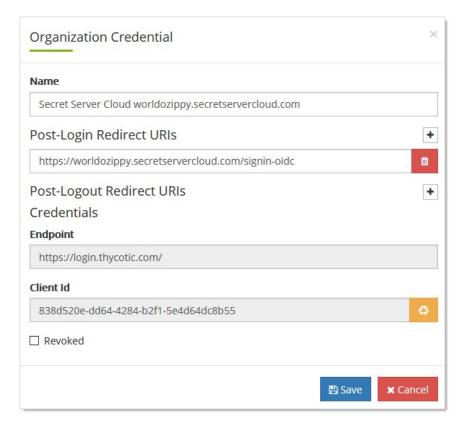
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link and select **Teams**. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



4. Click the **Credentials** button. The Organization Credentials page appears:



5. Click the **Edit** button next to the desired credential. The Organization Credential page appears:



6. Edit the controls as follows:

- Name: A display name for this credential.
- Post-Login Redirect URIs: Allowed callback URLs to which the user may be redirected after logging in. These are typically
 provided by the application that users will be logging into. The redirect URI provided during the login process must match one of
 these URIs exactly, or the login will fail.
- **Post-Logout Redirect URIs Credentials**: Allowed callback URLs to which the user may be redirected after logging out. These are optional, and only supported if the consuming application supports this feature.
- **Revoked**: Click to select this if you wish to revoke the credential. This can be used if you want to temporarily disable a credential, but not permanently delete it.
- 7. Click the **Save** button.

Viewing the Client ID

See Editing Credentials.

Viewing and Editing the Post-login Redirect URI

See Editing Credentials

Viewing the Post-logout Redirect URI

See Editing Credentials



Setting External Authorization Providers

See Editing Credentials.



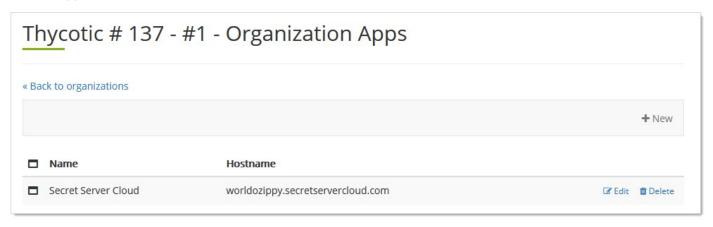
Organization applications are subscriptions (SSC instances), products (other Thycotic cloud products), Thycotic on-premises applications, or even third-party cloud or on-premises applications that run under Thycotic One single sign on, that is, to appear on your Thycotic One log on page. The configured applications appear on your Thycotic One log on page.

Deleting Applications

- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the Manage link on the dashboard. The Teams page appears.
- 3. Click the **Organizations** button for the desired team. The Thycotic One Organizations page appears:



4. Click the **Apps** button. The Organization Apps page appears:



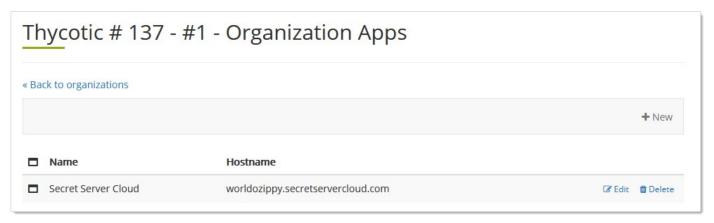
5. Click the **Delete** button next to the desired application.

Editing Secret Server Cloud and Other Applications

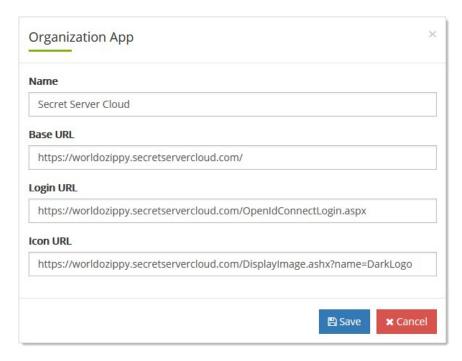
- 1. Log on to your Cloud Manager at portal.thycotic.com.
- 2. Click the **Manage** link on the dashboard. The Teams page appears.
- 3. Click the Organizations button for the desired team. The Thycotic One Organizations page appears:



4. Click the **Apps** button. The Organization Apps page appears:



5. Click the **Edit** button next to your SSC instance or other application. The Organization App popup page appears:



- 6. Edit the provided settings as desired.
- 7. Click the Save button.

Setting Application Links

See Editing Secret Server Cloud and Other Applications.

Setting Expiration Dates

Help

<u>Document Conventions</u>

Requesting New Features

Self-Help Resources

Technical Support



Capitalization

Technical writing is typically so awash in capitalization that it often denotes nothing and harms legibility. To counter that, in general, this document follows the IBM Style Guide rule:

"Do not capitalize the names of features and components unless they are sold separately or are trademarked."

More specifically, the only things capitalized in this document are:

- Company, person, country, geographic place, or organization names
- Official or trademarked products or services, unless they officially have atypical capitalization, for instance iPod.
- Acronyms and initializations
- When referring to any UI labels or pages that are capitalized
- When the word begins a sentence or phrase

Code and Command Line Text

Variable text in literal typed-in text and command-line parameters follow these industry-wide standards:

- All code and command-line interface text appears in monospaced text.
- Required parameters appear in angle brackets: ping <hostname>
- Optional parameters appear in square brackets: mkdir [-p] <dirname>
- Repeated parameters are followed by ellipses: cp <source1> [source2...] <dest>
- Multiple choice items are separated by vertical bars and grouped by curly brackets: netstat {-tl-u}

Keyboard Shortcuts

- Keyboard keys are bolded and surrounded with square brackets: [Enter]
- Concurrent key presses are denoted with plus signs: [Ctrl]+[Alt]+[Del]
- Sequential key presses are denoted by commas: [Page Down], [Enter]

Notes

There are three types of notes: regular, important and warning.

Note: Regular notes have a title, either "Note" or something custom, which appears as a phrase followed by a colon at the beginning of the note. A note contains tangential (an aside) or supplemental information (a tip or clarification).

Important: Important notes contain substantive information that should be heeded, or negative consequences can occur, involving frustration, wasted time, or minor data loss.

Warning: Warning notes contain substantive information that should be heeded, or negative consequences can occur, involving injury, major data loss, or equipment damage.

Other Special Text



- Email addresses and URLs are usually denoted by a colored underline: support@thycotic.com.
- When URLs are part of the instruction, as opposed to clickable link, they appear in monospaced text: Type https://www.somewhere.com.or click https://www.somewhere.com.
- Cross-references to headings are hyperlinks: See [Booting a Server][].
- Document or article names (not sections) appear in italics: See the Server Administration Guide. They may or may not be hyperlinks.
- All file and folder paths appear in monospaced text: app\bin\web_config.xml
- File names by themselves do *not* appear in monospaced text: web_config.xml. If the file name contains spaces, the name is surrounded by quotation marks: "web config.xml".

Note: Ending punctuation may be omitted for clarity when following typed-in text, including URLs.

Screen Components and Attentional Targets

- Mouse-click, keyboard, and other attentional targets (anything a looks for) are denoted by bold type: **OK** button or **Login** link.
- Attentional Targets and screen component names in system *responses* are not bolded: "The OK button appears" verses "Click the **OK** button."
- Names of screen components, such as tabs, buttons, and text boxes, are corrected for spelling and capitalization. The component type appears in lowercase. Example: **SEARVER CONFIGURATION** window becomes **Server Configuration** window.



We encourage customers with active support licensing to participate on $\underline{\text{feedback.thycotic.com}}$ where you can discuss and vote on new features.

Thycotic Blog

Thycotic Blog