



Prerequisites

01. Delinea Secret Server (Cloud or On-Premises) with administrative access.


02. A user account with permissions to add secrets to an initial folder.


03. A shared folder configured for multi-user access.


04. Event Pipeline feature enabled (requires Advanced Edition or higher).



Step-by-Step Workflow

01 User Login and Credential Entry



User Action:

- Log into Delinea Secret Server via the web interface (e.g., <https://<tenant>.delinea.app> or on-premises URL).
- Navigate to Secrets > Create Secret.
- Select a secret template (e.g., "Windows Account" or "Generic").
- Enter the credential details (e.g., username, password, notes).
- Save the secret in the designated Initial Folder (e.g., /Secrets/InitialCredentials).

Permissions:

- The user must have Add Secret permission for the Initial Folder.
- The folder is configured to allow users to create secrets but not necessarily view or edit them after creation.



02 Administrator Configuration

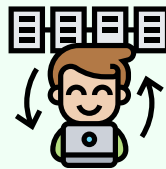
01. Folder Setup:

- Create an Initial Folder (e.g., /Secrets/InitialCredentials) where users deposit new credentials.
- Create a Shared Folder (e.g., /Secrets/SharedCredentials) for multi-user access.
- Configure permissions on the Shared Folder to allow specific groups or users to View, Edit, or Share secrets as needed.







02. Group Setup:

- Create a user group (e.g., SharedSecretUsers) for users who need access to the shared credentials.
- Assign the group to the Shared Folder with appropriate permissions.



03. Event Pipeline Setup:

- o Navigate to Admin > Event Pipeline Policies.
- o Create a new pipeline policy named, e.g., "Move Credential to Shared Folder."
- o Configure the pipeline as follows:

			
Event Trigger:	Condition:	Action:	Optional:
Secret Created.	Secret is created in the Initial Folder (/Secrets/InitialCredentials).	Move the secret to the Shared Folder (/Secrets/SharedCredentials). Update permissions to inherit from the Shared Folder or explicitly assign the SharedSecretUsers group with View and Edit permissions.	Send a notification to administrators or the user group when the secret is moved.

- o Save and enable the pipeline.

03 Event Pipeline Execution



Trigger:

When a user creates a secret in the Initial Folder, the event pipeline is triggered automatically.



Processing:

- o The pipeline checks if the secret was created in /Secrets/InitialCredentials.
- o If the condition is met, the pipeline moves the secret to /Secrets/SharedCredentials.
- o The secret inherits the Shared Folder's permissions, or explicit permissions are applied (e.g., SharedSecretUsers group).



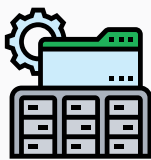
Logging:

- o The action is logged in the Audit Log for tracking and compliance.
- o Optional notifications are sent via email or integrated messaging (e.g., Slack, Microsoft Teams).

04 Multi-User Access

01. User Action:

- o Authorized users (members of SharedSecretUsers) navigate to /Secrets/SharedCredentials.
- o They can view or use the credential based on their permissions.



02. Security Considerations:

- o Ensure the Shared Folder has strict access controls to prevent unauthorized access.
- o Enable Require Approval or Check-Out policies for sensitive credentials to track usage.
- o Use Secret Server's Session Recording for accountability if users access the credential for privileged sessions.

