



CYBERARK®

# PSM Connection Manager and PSM Easy Connect Clients

## Implementation and Configuration Guide



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## 1.1 Document Properties

### 1.1.1 Document Information

The content of this document is provided for informational use only. This document is presented "as-is", and material contained in this document, including screen captures, URLs, and other website links or references may change. In addition, the actual user experience and success of this tool may hinge on unique customer environment variables and system settings, such as operating system, network access, safe and platform design, etc.

### 1.1.2 Terms

This tool provided as a "Community" solution. Please refer to "CyberArk Marketplace Terms of Use" for further information.

## 1.2 New to Version 2.6.3

- New features:
  - CustomView (RDP Manager) – Build your own Directories and organise servers the way you want. Group together Stacks of target systems to improve your day-to-day privileged access.
  - MultiConnect (CustomView) – Whether performing maintenance or doing daily checks, MultiConnect allows you to select a folder of servers you have setup in CustomView and initiate a connection to all of these systems with 3 clicks!
  - Easy Account Selector – Within “CustomView”, select your preferred Domain account to connect to target systems. Either by double clicking your configured target or using “MultiConnect”.
  - By default, the connection manager will now avoid disconnecting your session to the CyberArk PAM web console allowing for you to use the connection manager and the CyberArk web interface at the same time.
  - Enabled special characters in the remote-machine field, previously this could stop connections to databases.
  - GUI Upgrades! The interface has been modernised with an updated look that fits in with your desktop tools.
- Fixes:
  - Fixed an error that would pop up when authenticating against ISPSS.

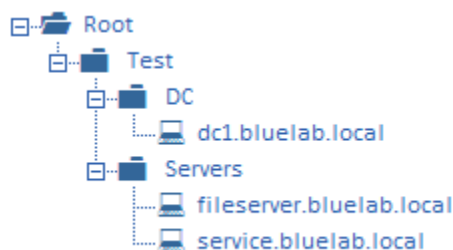
## 1.3 Solutions Overview

The Privileged Session Manager (PSM) “PSM Client” and “PSM Easy Connect” tools make accessing target platforms quick, easy, and secure. The tool leverages the same authentication methods as the Password Vault Web Access (PVWA) Interface, but gives the end user a native and easy to customise experience.

Additionally for customers of Privilege Cloud or ISPSS, there is functionality to bring this same tool to your users, allowing for frictionless, and secure access to targets.



The typical use case for this tool is when end users do not want or need access to the PVWA/Identity console, but still need to access targets via the PSM. The experience for the user is a “PSM for Windows” like connection, with the advantages such as organising target systems into custom views.



An example of how this tool works can be found here :- [https://www.youtube.com/watch?v=KD7pTc7\\_Wwo](https://www.youtube.com/watch?v=KD7pTc7_Wwo)

Ref PSM for Windows <https://docs.cyberark.com/Product-Doc/OnlineHelp/PAS/Latest/en/Content/PASIMP/PSSO-ConnectingDirectly.htm>

## 1.4 PSM Connection Manager

PSM Connection Manager gives end users a convenient and quick way to securely gain access to systems protected by CyberArk PAM. The tool is deployed to users desktops and is easily configured either before or after distribution.

The tool presents a window with a directory search feature and allows users to select the system they wish to connect to. The tool also brings with it a variety of additional user friendly features, such as adding favourites, adding new targets, Connecting to Multiple systems with a single account (Domain Based) and searching for targets, accounts, and platforms. To keep this section short other features will be detailed later in this document, and we encourage you review these.

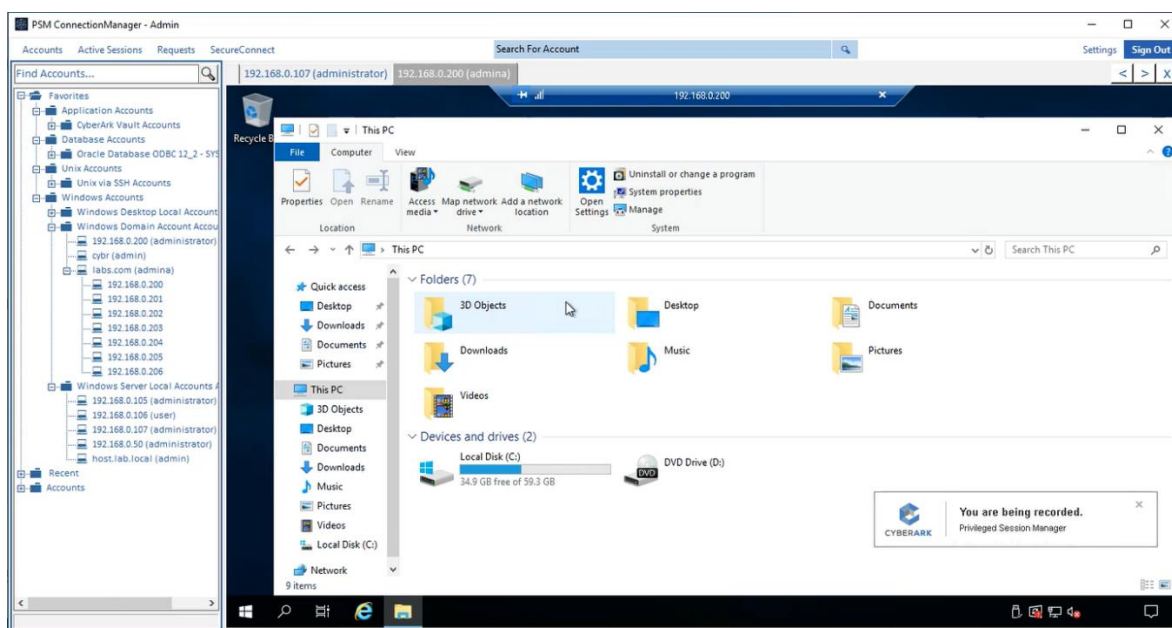


*Figure 1. PSMConnectionManager*

## 1.5 PSM Easy Connect

PSM Easy Connect takes the lightweight tool one step further and introduces an easy to use search bar, located at the top of the users desktop. The immediate difference is the smaller footprint directly on the users desktop, including a useful “hide” feature. Now when a user selects an account from the search menu, they will be connected to the target system using the native windows remote desktop tool (mstsc).

Most features present in the PSM Client are also available in PSM EasyConnect, making the choice mostly about preference!

*Figure 2: Easy Connect bar.*



## 1.6 High Level Architecture

The end users' machine must be able to connect to the PVWA over HTTPS (443) and to the PSM over RDP (3389).

This illustration helps to focus on the core communication requirements.

This architecture simplifies the technical considerations of a multi-domain and segregated environment.

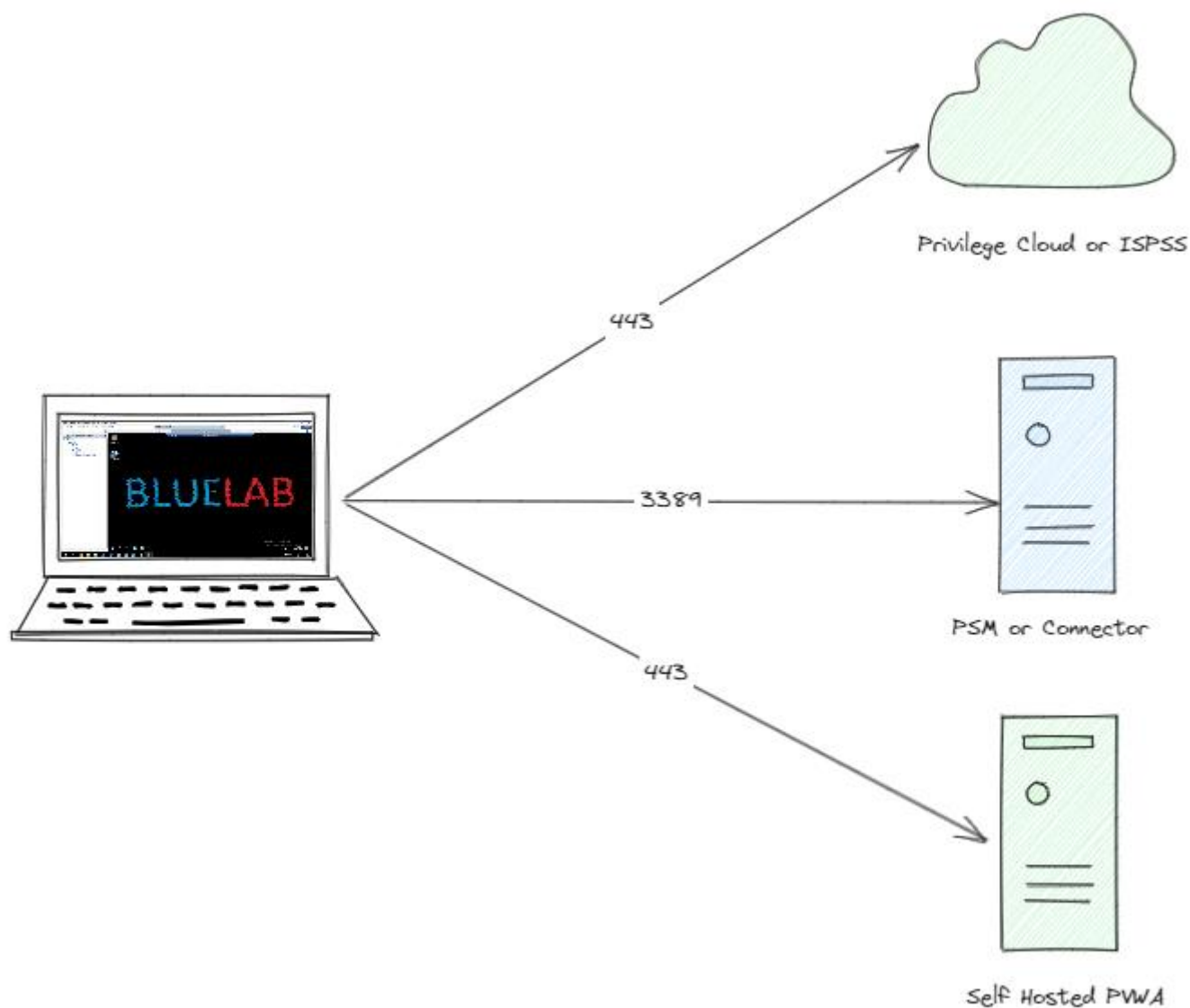


Figure 3. Connections with Cloud and Self-hosted



## 1.7 PSM Connection Manager and PSM EasyConnect Pre-reqs

- An account with access to the PVWA or Access to Privilege Cloud/ISPSS.
- Any version of Windows (tested on Windows 10)
  - .NET Framework deployed (uses v4.6)
- PSM Connection Manager and PSM EasyConnect Requires HTTPS (443) access to the PVWAs / Privileged Cloud / ISPSS.
- PSM Connection Manager and PSM EasyConnect Requires RDP (3389) access to PSM server / Privileged Cloud Connector running PSM.
- Supports all Authentication Methods that are supported by CyberArk PVWA:
  - CyberArk
  - LDAP (Lightweight Directory Application Protocol)
  - RADIUS (Remote Access Dial In User Service)
  - SAML (Security Assertion Markup Language)
  - PKI (Public Key Infrastructure) and PKI PN (PKI Principal Name)
- Supports access via Identity.



- NOTE: CyberArk recommends using MFA for all authentication to access all CyberArk Products as referenced in [Security Fundamentals](#).



## 1.8 PSM Connection Manager

PSM Connection Manager gives end users a convenient and quick way to securely gain access to systems protected by CyberArk PAM. The tool is deployed to users desktops and is easily configured either before or after distribution.

The tool presents a window with a directory search feature, and allows a user to simply select the system they wish to connect to. In addition extra features exist, such as adding favourites, and adding new targets when using a domain or distributed account.

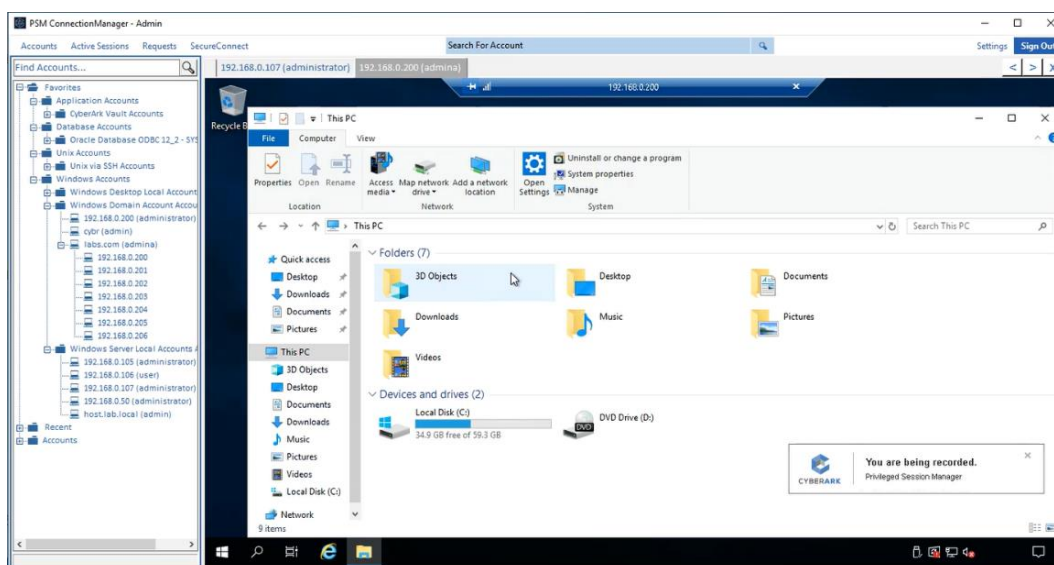


Figure 4: PSM Connection Manager

### 1.8.1 Connection Manager Installation Steps

- Download the PSMClient from the Marketplace.
- Extract the zip file to a folder called: "PSM Connection Manager" on your computer.
  - The zip file contains three files; two are DLLs.
    - PSMConnectionManager.exe – This is the executable that you will use to run the actual utility.
    - PSMConnectionManager.exe.Config – This is created after first launch.



- NOTE: You do not have to configure the Config file directly, all of that will be done via the Executable. This Config can be pre-configured for enterprise-wide deployments.

- Create a shortcut on the user's desktop, start menu, or pin to the taskbar for easy access.

| Name                     | Date modified    | Type                 | Size   |
|--------------------------|------------------|----------------------|--------|
| AxInterop.MSTSCLib.dll   | 23/02/2023 14:54 | Application exten... | 332 KB |
| Interop.MSTSCLib.dll     | 23/02/2023 14:54 | Application exten... | 586 KB |
| PSMConnectionManager.exe | 23/02/2023 14:09 | Application          | 451 KB |

Figure 5: PSM Connection Manager extracted from the PSMClient zip



## 1.8.2 Connection Manager Details

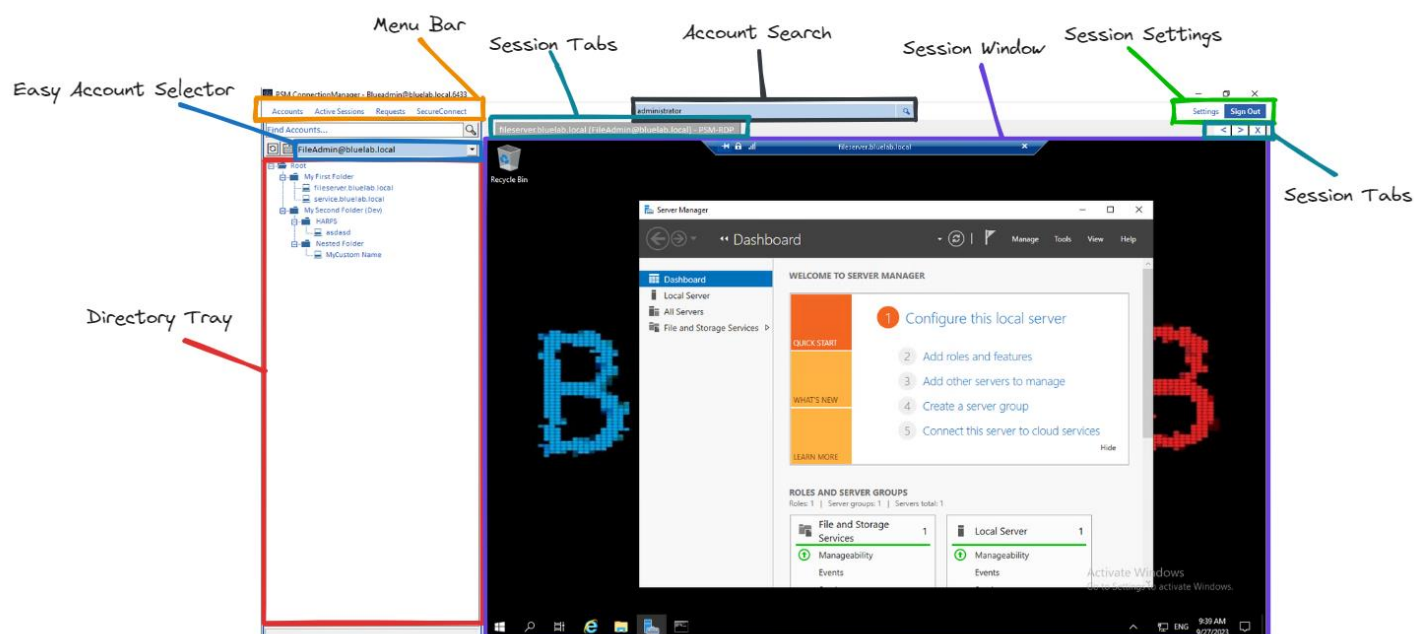


Figure 6. PSM Connection Manager Details

The Easy Account Selector is presented in CustomView, showing Favorited Domain based accounts.

## 1.8.3 Connection Manager Settings

- Start PSMConnectionManager.exe and fill in the parameters. (See Figure 2)
- The Question mark will also help you with filling in these details, for example clicking the question mark will present 3 options.
  - Self-Hosted
  - Privilege Cloud
  - ISPSS
- Selecting the service you are using will change the PVWAURL to an example of what this could be.

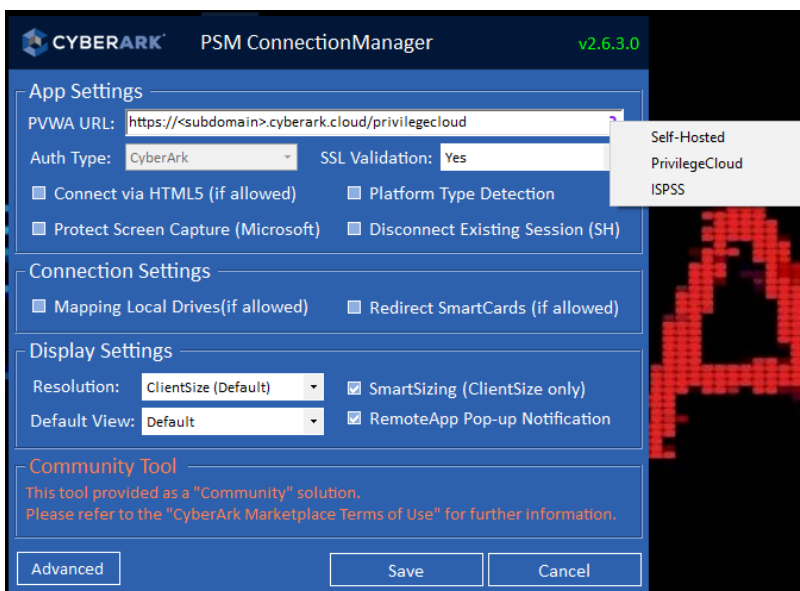


Figure 7: PSM Connection Manager Settings UI

- Once open, fill in the following configuration parameters:

| App Settings                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PVWA URL                       | <p>The URL for your PVWA,</p> <p>Self-Hosted:- <a href="https://&lt;IIS_Server&gt;/PasswordVault">https://&lt;IIS_Server&gt;/PasswordVault</a></p> <p>Privilege Cloud:- <a href="https://&lt;subdomain&gt;.privilegecloud.cyberark.com/PasswordVault">https://&lt;subdomain&gt;.privilegecloud.cyberark.com/PasswordVault</a></p> <p>ISPSS :- <a href="https://&lt;subdomain&gt;.cyberark.cloud/privilegecloud">https://&lt;subdomain&gt;.cyberark.cloud/privilegecloud</a></p> |
| Auth Type                      | <ul style="list-style-type: none"> <li>Greyed out when ISPSS or Privilege Cloud is selected.</li> <li>LDAP</li> <li>SAML</li> <li>CyberArk</li> <li>Radius</li> <li>PKI</li> <li>PKIPN</li> </ul>                                                                                                                                                                                                                                                                               |
| SSL Validation                 | <p>This enables SSL Validation from the client to the PSM Server</p> <p> <b>NOTE: "Yes" is recommended</b></p>                                                                                                                                                                                                                                                                               |
| Connect Via HTML5 (if allowed) | <p>If users access targets via the HTML5 Gateways, select this box.</p>                                                                                                                                                                                                                                                                                                                                                                                                         |
| Platform Type Detection        | <p>The Client will identify which accounts are of "Domain" type and prioritises their use.</p> <p> <b>Note: For usage before 12.7 please review CyberArk Knowledge base KB 25781</b></p>                                                                                                                                                                                                     |



|                                     |                                                                                                                                                                                                                                                                       |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Protect Screen Capture (Microsoft): | Protects the privileged session from being shadowed and stops screenshots from being taken of sensitive information in said sessions.                                                                                                                                 |
| Disconnect existing Session (SH)    | Used for Concurrent sessions Leave unticked to avoid being signed out of existing web gui session.                                                                                                                                                                    |
| <b>Connection Settings</b>          |                                                                                                                                                                                                                                                                       |
| Mapping Local Drives (If allowed).  | <p>If the PSM Connection Component allows mapping local drives, this enables this feature.</p> <p> NOTE: If it is disabled on the Connection Component, this will NOT enable it.</p> |
| Redirect Smart Cards (If allowed).  | If your environment uses Smart Cards (or CAC or PIV cards) to logon to target machines that are redirected to the PSM servers during the RDP connection, ensure you check this box.                                                                                   |
| <b>Display Settings</b>             |                                                                                                                                                                                                                                                                       |
| Resolution                          | <ul style="list-style-type: none"> <li>• Client Size (Default)</li> <li>• 1024 x 768</li> <li>• 1280 x 720</li> <li>• etc.</li> </ul>                                                                                                                                 |
| Smart Sizing (ClientSize only)      | When resizing the Connection Manager window, or changing the size of the side panel, the RDP session will be resized to fit.                                                                                                                                          |
| Default View                        | Decide which tree you want to see in the Directory Tray.                                                                                                                                                                                                              |
| RemoteApp Pop-up Notification       | <p>When RemoteApp is enabled in your PSM environment, a notification about RemoteApp will appear.</p> <p>the user opens a session will open in a separate window.</p>                                                                                                 |
| <b>Extra</b>                        |                                                                                                                                                                                                                                                                       |
| Advanced (Button)                   | <p>Clear Browser Cache</p> <p>If during a session there is a need to clear the cache without closing the application first, use this option.</p> <p>The Cache is cleared both on program launch and normal program termination.</p>                                   |

- Click "Save" and the configuration will be saved, and the application will start.

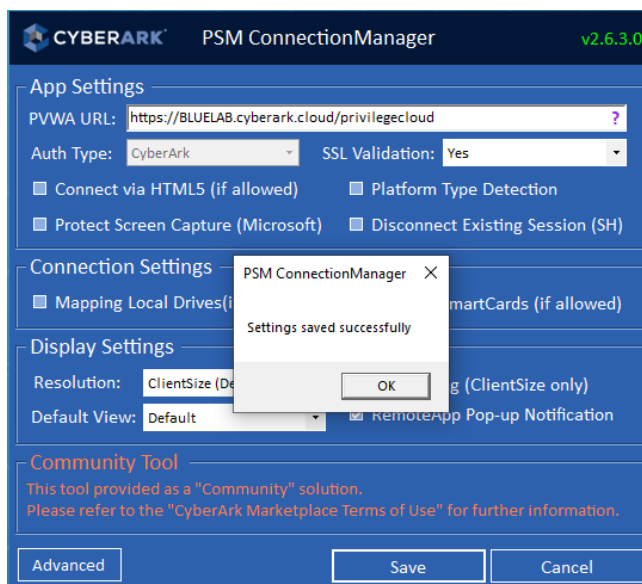


Figure 8. PSM Connection Manager Configured Settings

- Below is an example of a user logging in via CyberArk Auth with Platform Type Detection and RemoteApp Pop-up notifications enabled.

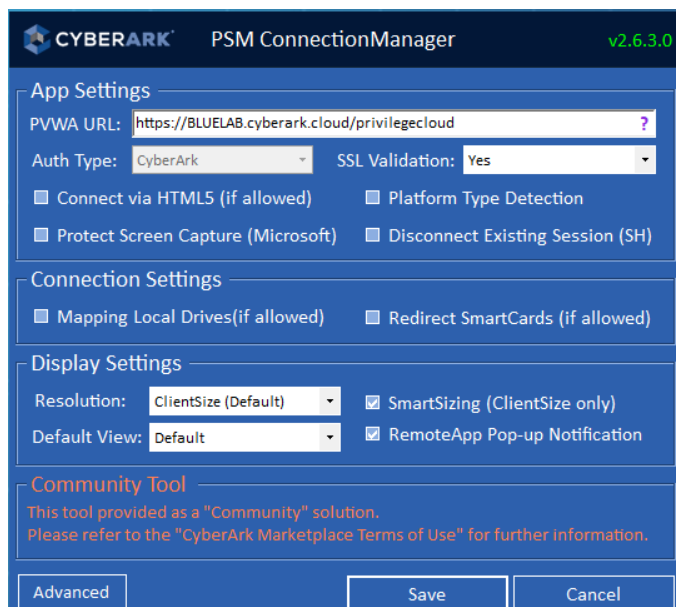


Figure 9. Connection Manager Settings UI including configurations.

Once you click "Save" the login screen should appear. Use the same credentials you used to log on to the CyberArk PVWA with the same authentication type from the PVWA configuration.



### 1.8.3.1 PSM Connection Manager Prompt

A Windows Security dialog box titled "PSM ConnectionManager". It contains the text "Please Specify your authentication details:" followed by two input fields: "User name" and "Password". At the bottom are "OK" and "Cancel" buttons.

Figure 10: PSM Connection Manager Authentication Window

If the login prompt cannot be seen, simply click the windows notification banner to bring it to the foreground.

### 1.8.3.2 ISPSS Login Prompt

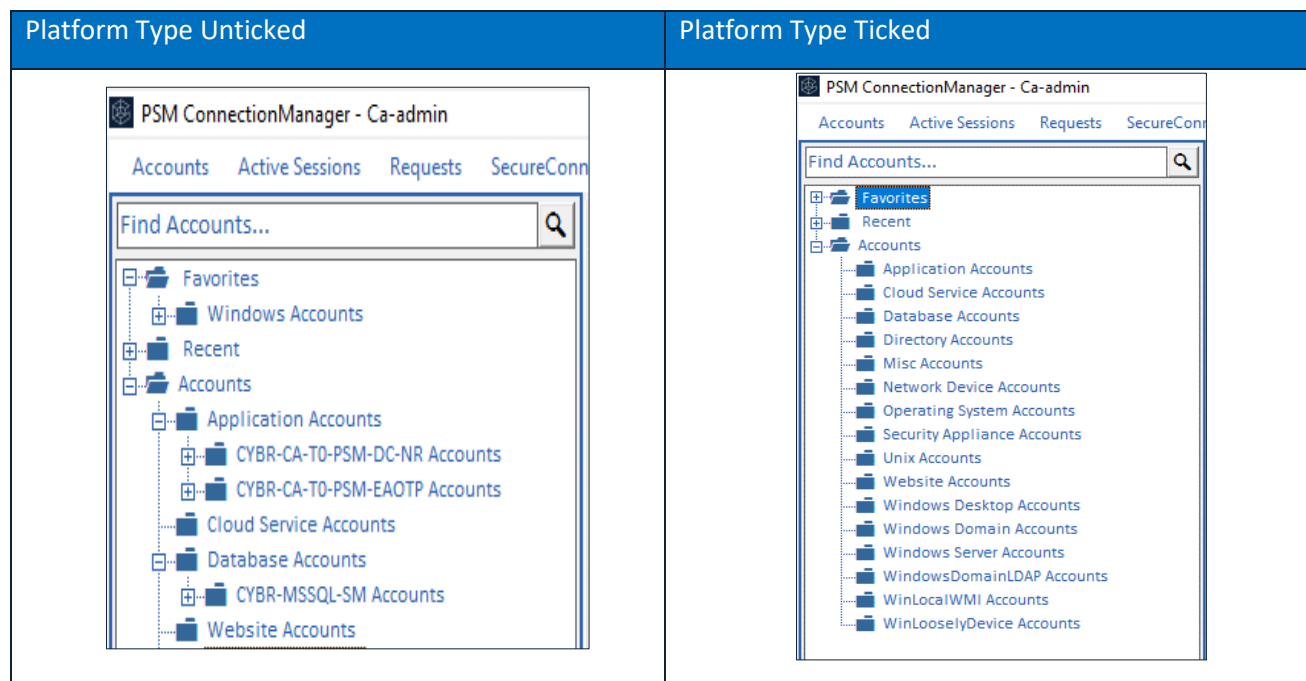
A sign-in window for CYBERARK. It features the CYBERARK logo at the top left. Below it is the text "Sign In" and "Enter your username (user@domain)". There is a user icon and a text input field. A "Next" button is below the input field. The background is a blue illustration of a person sitting on a building ledge, working on a laptop. At the bottom, there is a footer with "© 2023 CyberArk Software Ltd.", links for "Terms of Use" and "Privacy Policy", and a "Powered by CYBERARK" logo.

Figure 11. Identity Prompt for Authentication



### 1.8.3.3 Platform Type Detection

When using the Platform Type Detection, the folders that appear under accounts are organised differently. This may be selected due to user preference or use case.



Note the difference, Windows accounts have been consolidated when unticked, and have been reorganised when ticked.

In addition to the change to the way accounts are displayed, this feature also enables the temporary targets, and additional targets context menu.

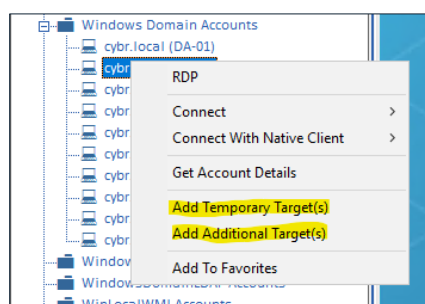


Figure 12: Add target(s) options in an account's right-click menu.

### 1.8.3.4 SAML Authentication

Launch the PSMConnectionManager.exe:

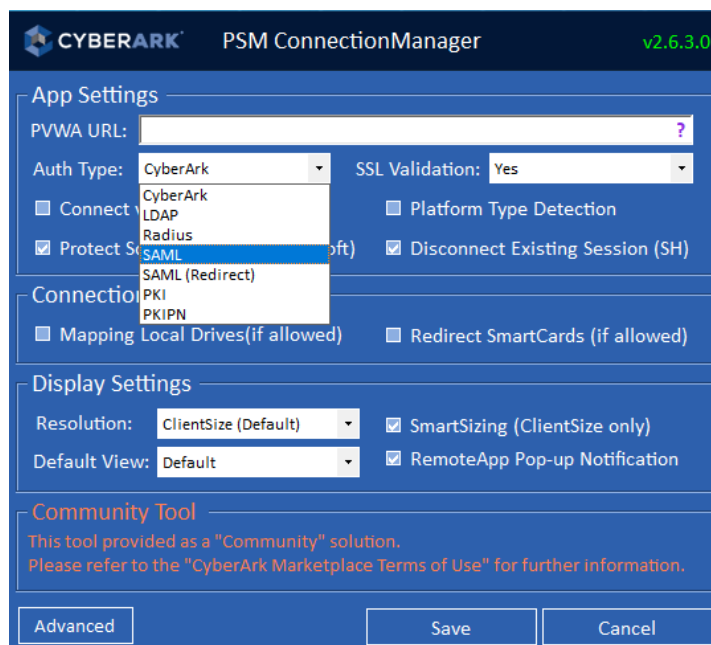


Figure 13. Self-Hosted SAML Configuration

- If this is not the first time configuring the Client, click “**Settings**” in the top right corner.
- Enter your PVWA address.
- Under Auth Type choose → **SAML**

Once the application is open, you will see your SAML authentication window appear:

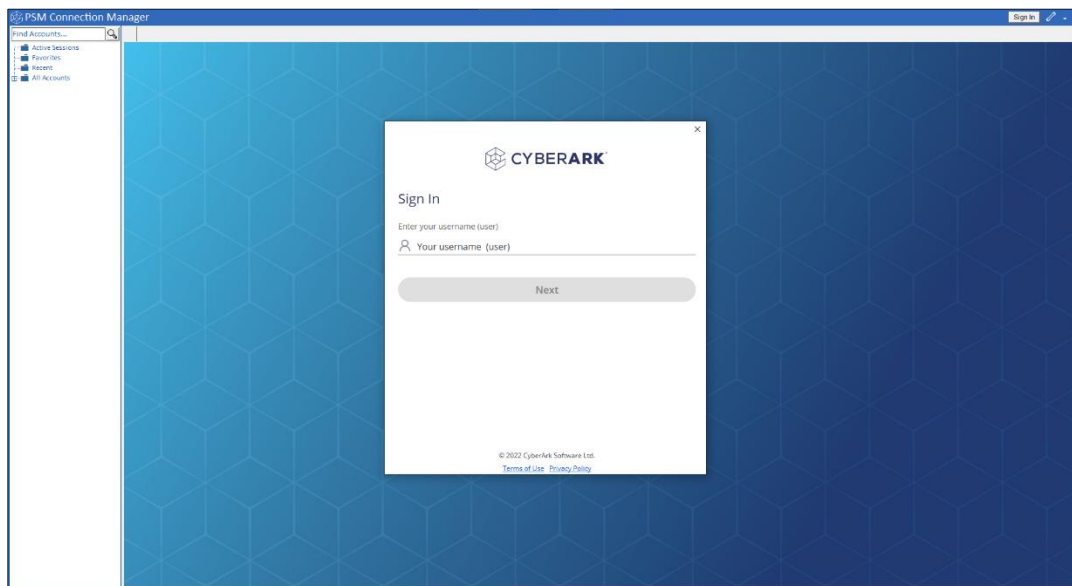


Figure 14. Self-Hosted Prompt for SAML Configuration



## 1.8.4 Connection Manager User Interface

By default, accounts are organized via Platform groups:



Figure 15: Accounts ordered by platforms types.

Platforms are consolidated into their respective types and can be explored by expanding the folder structure. Double clicking a folder will initiate the search and present results.

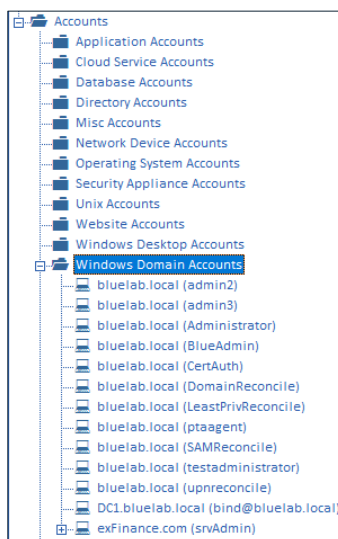


Figure 16: Accounts listed after platform is double-clicked.

### 1.8.4.1 Using Accounts

A user can select an account and initiate a session by double clicking on the desired account, at this point a new tab will be opened in the PSM Connection Manager. This session will use the default platform connection component.

Alternatively, a user can right-click the account and go through the interface to pick their desired Connection Component:

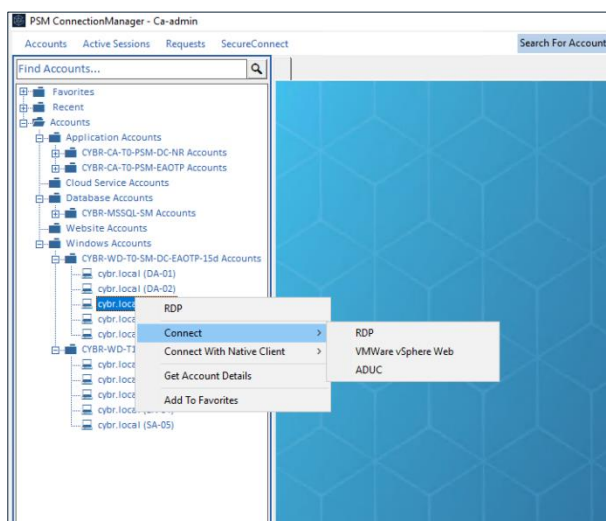
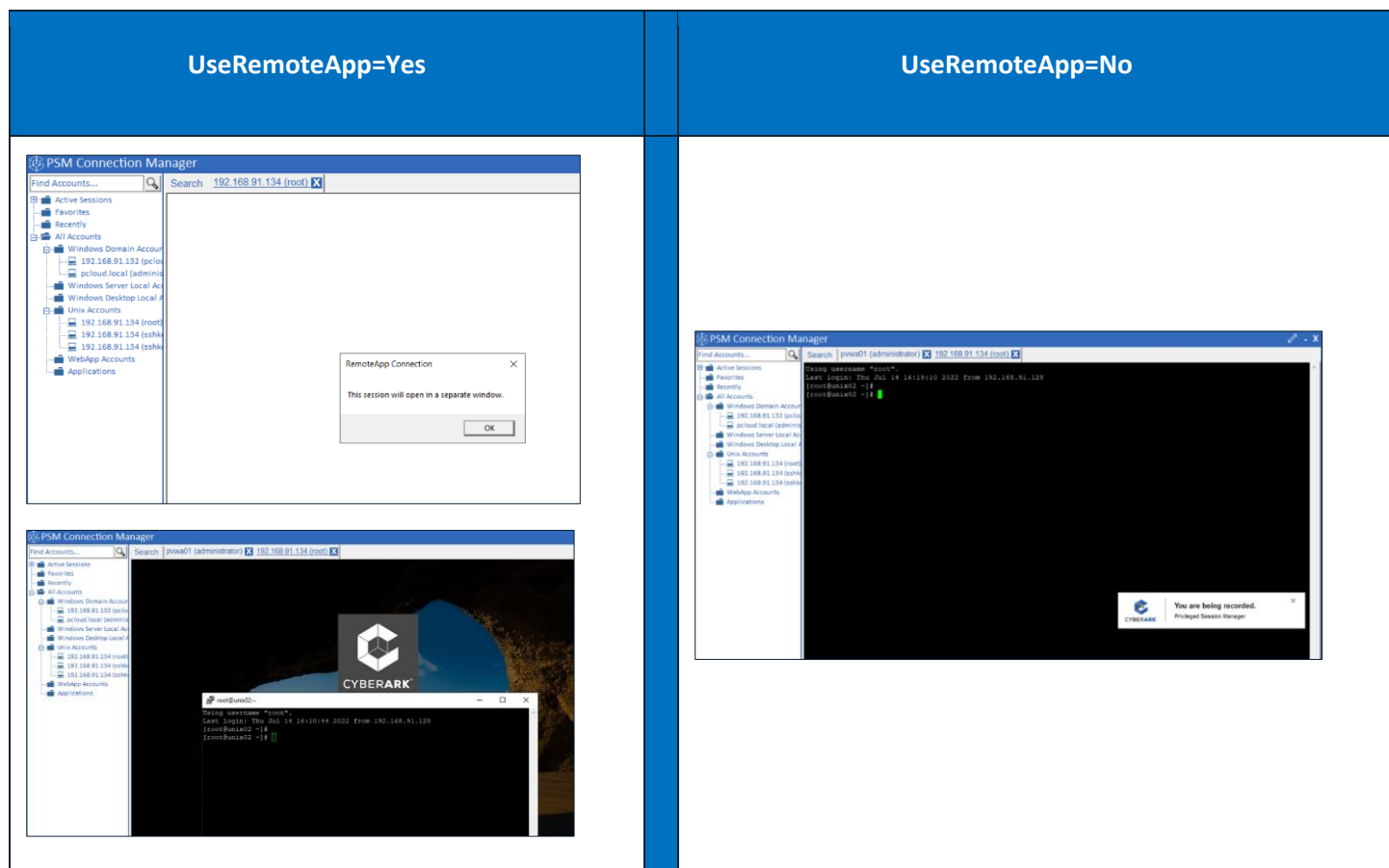


Figure 17: Account Context Menu

If in your environment, you use RemoteApp and the setting for the connector is "UseRemoteApp=Yes" then the session will be created in a separate window outside of the Connection Manager application. The user will be prompted when this activity occurs unless RemoteApp Pop-up Notification is unchecked in the settings. For example, a PSM-SSH session:



### 1.8.4.2 Remote Machine Access

Where limited machine access has been configured for an account, during onboarding:

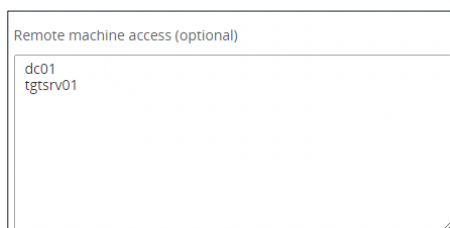


Figure 18: Web UI view of an account's "Limit Domain Access To" configuration

The end user will see the list of machines under the PSM Client account:

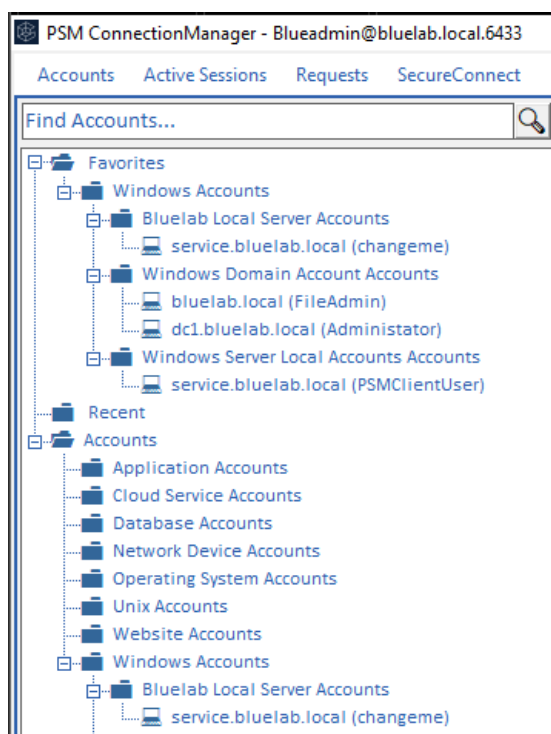


Figure 19: Accounts with limit domain access will show those targets listed under the account

### 1.8.4.3 "Right-Click" Context Menu

Right clicking on an account will present the user with a context menu which provides advanced options for a connection.

Context Menu Without Platform Detection  
selected

Context Menu WITH Platform Detection selected

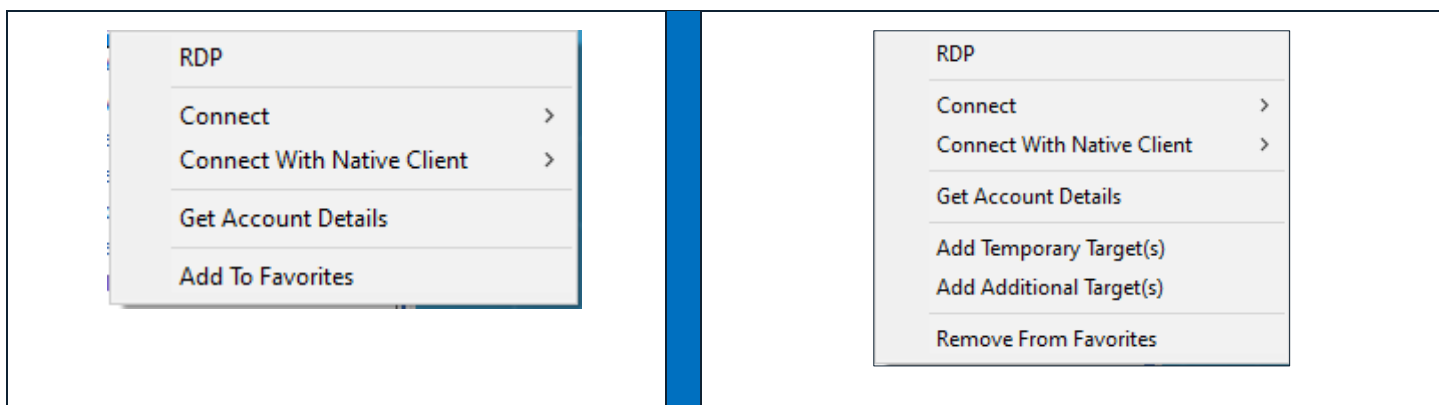


Figure 20: Right-Click context menu

| Option                                          | Detail                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>RDP</b>                                      | This is the Default connection component. If the default was PuTTY, then this would be the option available here.                                                                                                                                                                                                                                                                  |
| <b>Connect</b>                                  | This will show you other connection components available for this account.                                                                                                                                                                                                                                                                                                         |
| <b>Connect with Native Client</b>               | Use this if there is a need to use the local RDP client (e.g., mstsc)                                                                                                                                                                                                                                                                                                              |
| <b>Get Account Details</b>                      | <p>See information about the account being used. Great for verifying if this is the right account or troubleshooting access.</p> <p>Details presented:</p> <ul style="list-style-type: none"> <li>▪ Object ID</li> <li>▪ Object Name</li> <li>▪ Address</li> <li>▪ Username</li> <li>▪ Safe Name</li> <li>▪ Platform ID</li> <li>▪ Platform Account Properties (if any)</li> </ul> |
| <b>Add Temporary Targets*</b>                   | <p>If you want to add some targets systems, but do not want them to be available after closing the agent.</p> <p>After closing you would need to enter these details again.</p>                                                                                                                                                                                                    |
| <b>Add Additional Targets*</b>                  | <p>This option has been added at request, and we recommend that it is not used if the target system addresses are sensitive in nature.</p> <p>This will create a local cached XML, with comma separated targets for the selected account.</p>                                                                                                                                      |
| <b>Add to Favorites / Remove from Favorites</b> | As the name suggests, this allows a user to add an account to their favourites for quicker access.                                                                                                                                                                                                                                                                                 |



\* These settings are only available if “Platform Type Detection” is enabled in the settings.

### 1.8.4.4 Search Bar

The search bar at the top-left of the Connection Manager window or in the menu bar allows a user to search all accounts in safes their account is entitled to. Search results are highlighted in the window below.

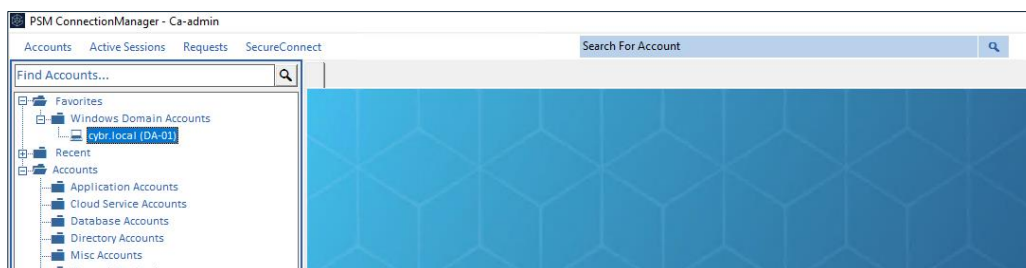


Figure 21: Search bars above accounts and above the connection pane

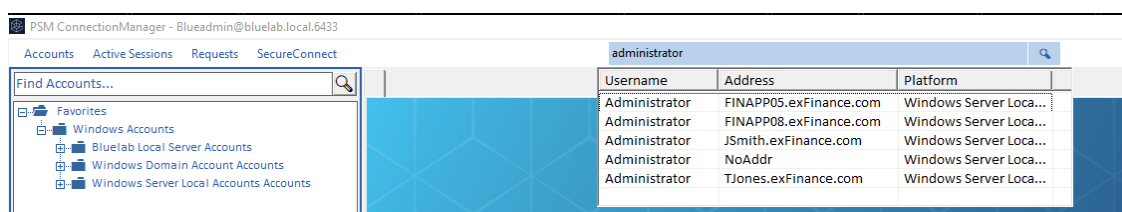


Figure 22. Search Bar Results Example



**NOTE:** The search will go through the account's username and address properties as shown above. But keep in mind address, username, and platform type are the only properties we can search on at this time.

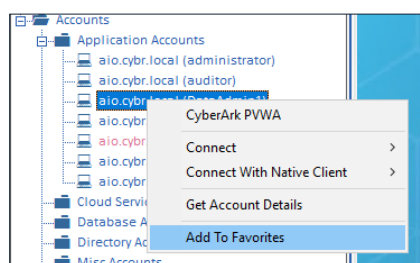


Figure 23: Context menu for an account showing how to add to favorites.



### 1.8.4.5 Tab Control

Users can switch between or close connection tabs using the buttons directly above the connection pane.

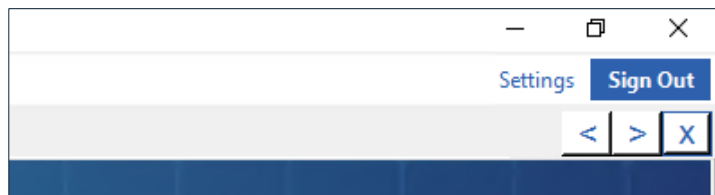


Figure 24: User can switch between or close tabs using the dedicated buttons.

To switch to the tab to the right, the user should click the '>' button. To switch left, click the '<' button. To close a tab, the user should click the 'x' button.

## 1.8.5 The Menu Bar

### 1.8.5.1 Accounts

By default, the accounts are listed in three categories, Favourites, Recent, and Accounts. You can change the view of these categories from the “Accounts” menu in the menu bar.

This can offer end users with the ability to choose how they select and organise their accounts.

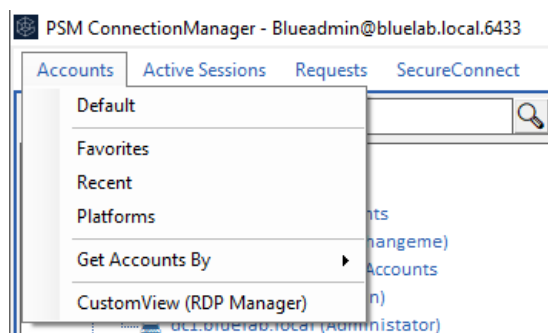


Figure 25: Accounts menu

Selecting “Favorites” will present the user with just their “Favorites”.

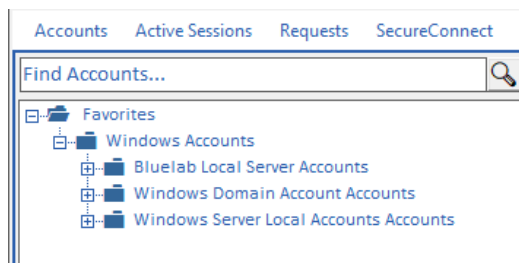


Figure 26. Favorites View

The same logic applies to the Recent, and Platforms options.

You may also use “CustomView (RDP Manager)”

“Get Accounts By ►” will allow users to list the accounts by Platform, Safe, Username, or Address.

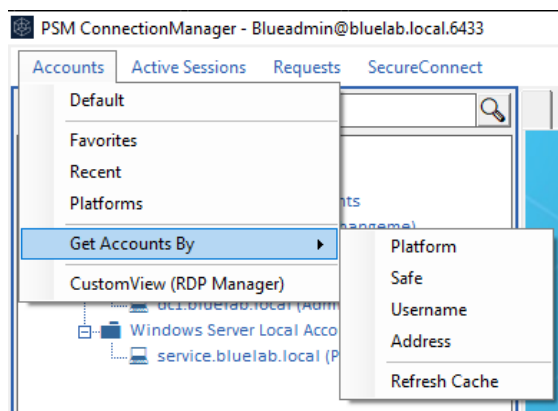


Figure 27: Get Accounts by Options

For example, when choosing to get accounts by username, the account list will show all accounts as the base list.

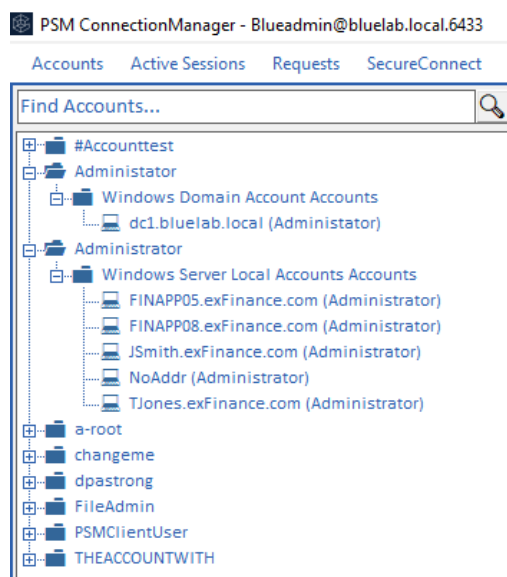


Figure 28: Accounts list with Get Accounts by Username

Clicking Accounts > Default will switch the view back to the default view showing Favourites, Recent, Accounts in the accounts list.

### 1.8.5.2 Active Sessions

The Active Sessions menu in the menu bar allows the user to Close All Tabs of connected sessions.

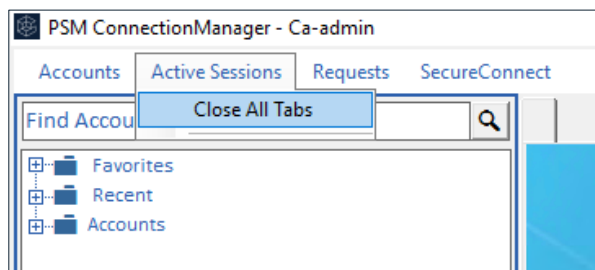


Figure 29: Active Sessions menu

### 1.8.5.3 Requests

Accounts that are protected by Dual Control can also be accessed via the PSM Connection Manager including Pending request. The user requesting the account(s) can see their Requests and the user approving the requests can see those incoming requests.

For example, a user requesting a dual-control-protected account:

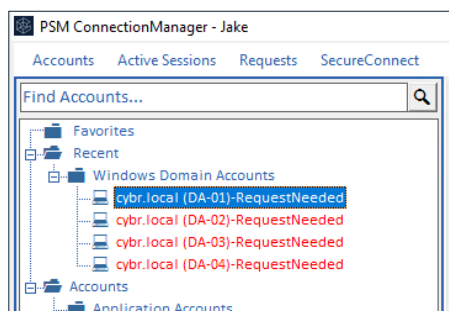


Figure 30: Accounts that require a request will be red.

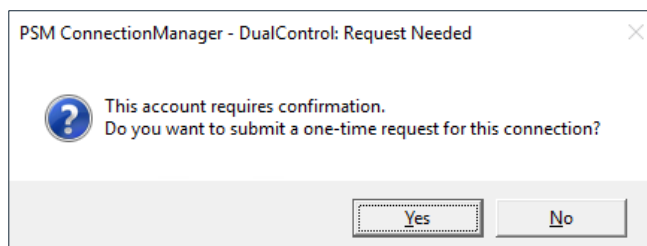


Figure 31: A message is presented to the user asking for confirmation.

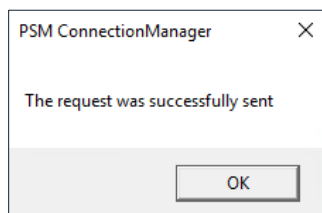


Figure 32: A confirmation window appears after choosing Yes.

After performing the request, the user will then see their requests in the Requests Menu in the menu bar. In the



My Requests window, the user can see their request and “Delete” it if it’s no longer needed.

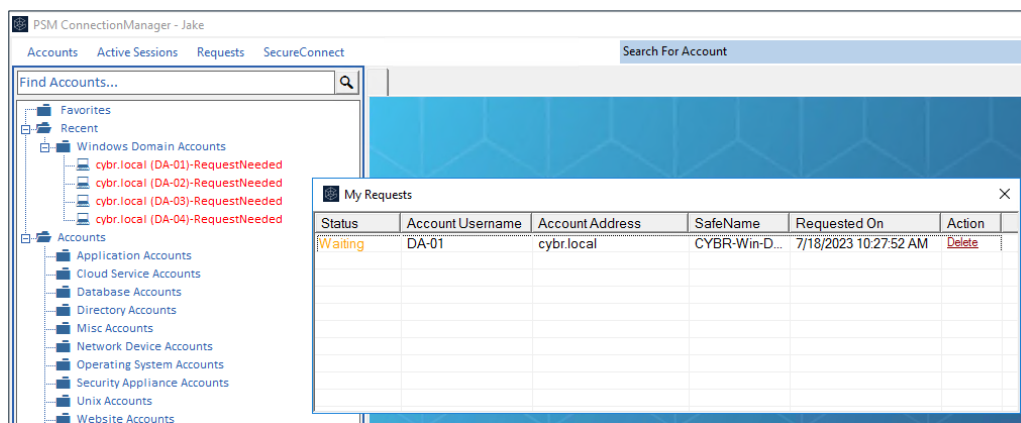


Figure 33: My Requests Window for the requestor

The Approver can then open the “Incoming Requests” window from the Requests menu in the menu bar. From here, the approver can see the details of the request and Confirm or Reject the request.

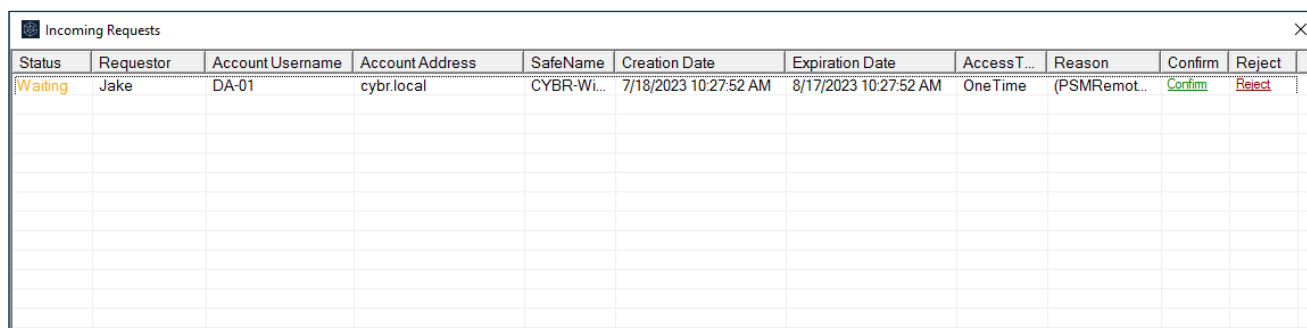


Figure 34: Incoming Requests Window for the Approver

### 1.8.5.4 SecureConnect

Secure Connect allows users to leverage PSM with accounts that are not onboarded. Users can use either RDP or SSH with SecureConnect at this time. The Secure Connect platform must be enabled for this functionality to work. Please see the [Secure Connect Documentation](#) for more information.

When choosing “RDP” or “SSH” the user will be prompted to enter a target address, username, and password, and reason for the connection.

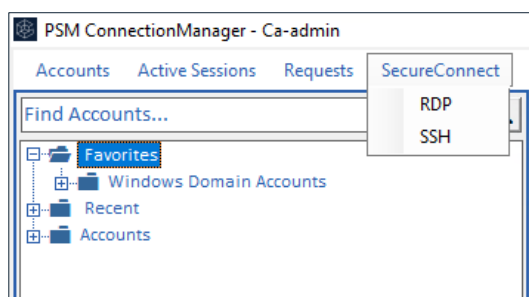


Figure 35: Secure Connect menu in the Menu Bar



### 1.8.6 RDP CustomView

The RDP CustomView provides end users with the ability to simultaneously connect to target systems, while also building their own tree structure.

When first accessing the “RDP CustomView” menu from Accounts a message will be presented to make you aware that the file created is local to the system.

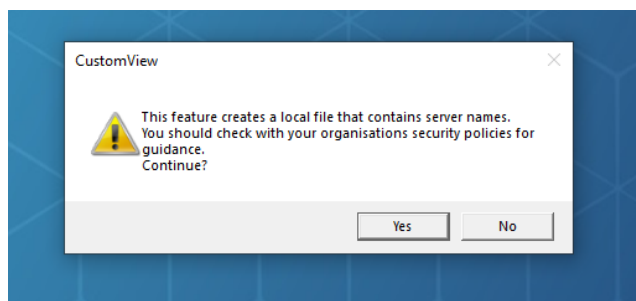


Figure 36. File Creation Prompt for CustomView

This file is created when the Save Button is clicked at the top of the directory tray, or if you exit the PSMConnectionManager and Click yes to save:-

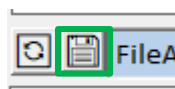


Figure 37. Save Button near Easy Selector

The file (Custom.XML) is created in the PSMConnectionManager Directory and contains the tree structure, and the server names entered.

If the save button is not clicked the file is not created, however, the view will not be persistent between launches.

#### 1.8.6.1 Easy Account Selection

In CustomView, above the Directory Tray a drop-down box has been added to allow for Easy Account Selection with “Double Click” and “MultiConnect” Connections. This provides end users with an easy way to set a **DOMAIN** account as the default account to connect to a target system.

The Easy Account Selection list of accounts is defined by the users Favourited accounts.



Keep in mind you can favourite accounts from the PSMConnectionManager!

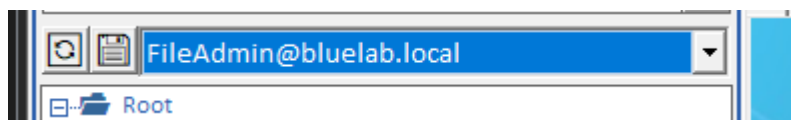


Figure 38. Easy Account Selector



### 1.8.6.2 Creating a Custom View

Creating your own hierarchy of systems is a quick process and is typically driven directly from the directory tray.

1. First, right click on the root and select “Add Folder”.
2. Enter a name for the folder.
3. Click OK

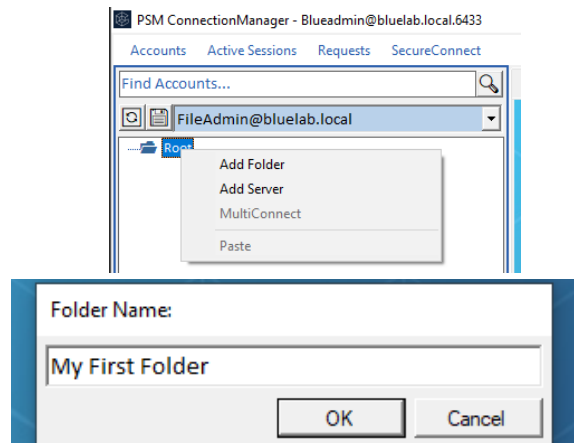


Figure 39. Folder Creation Prompts

That's it! You have your first folder. You can place servers directly in root, but to get the most benefit from the feature, custom folders are recommended.

You can also nest folders within each other.

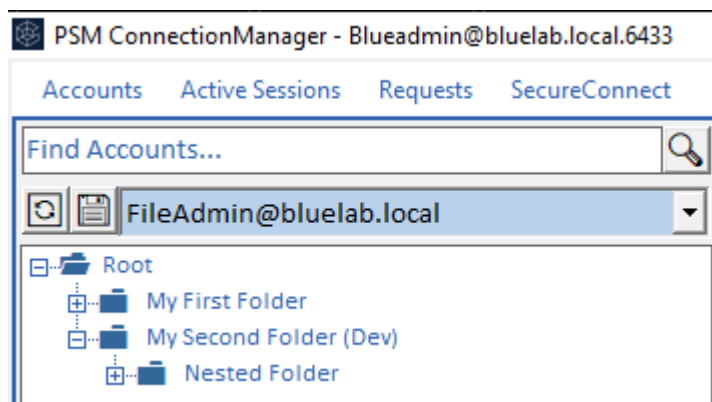


Figure 40. CustomView Folder Nesting

Once the Folder Structure has been created, you are able to add servers to each. To do this, right click on a folder and select “Add Server”.

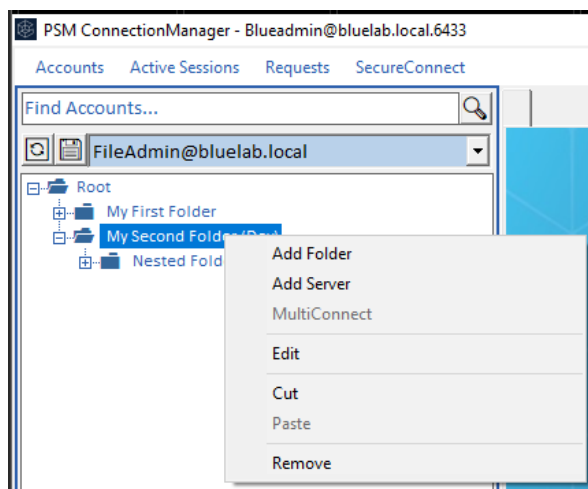


Figure 41. context Menu, select add Server.

You will be presented with a simple interface asking for the system you wish to connect to. By default, the name of the server is entered as the address. However, this can be changed to something more friendly.

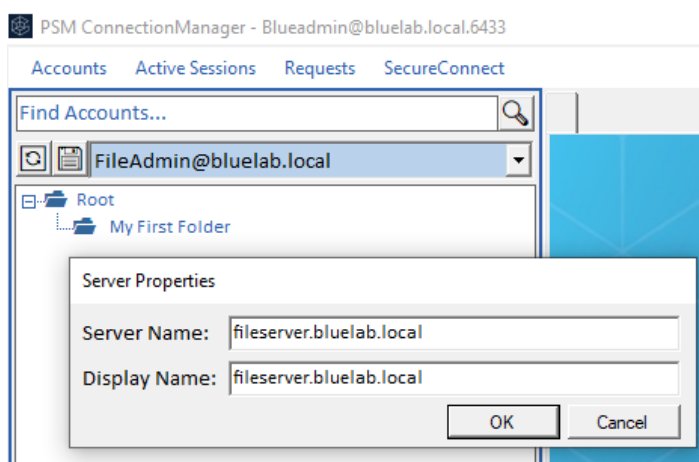


Figure 42. Add Server Configuration window.

Servers can also be given custom display names, after the server's name has been entered if there is a friendly name for it.

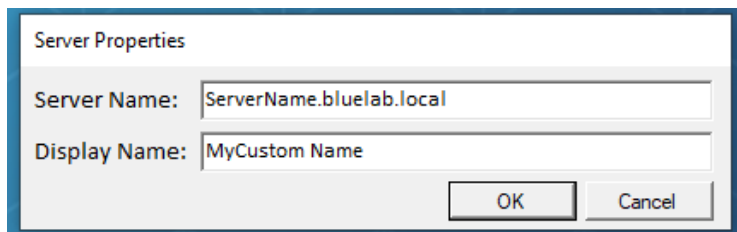


Figure 43. Customise Display Name Window



### 1.8.6.3 CustomView Connections

Within the CustomView new context menus are available. When right clicking on a folder the following menu is presented: -

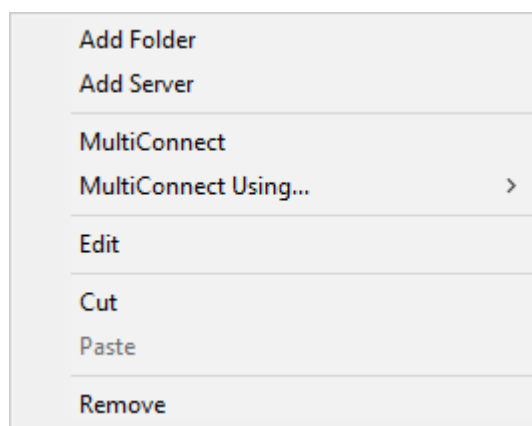


Figure 44. Custom View context Menu Folders

| Option Name           | Details                                                                                                                                                                            |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Folder            | Add a folder to the folder hierarchy.                                                                                                                                              |
| Add Server            | Add a Server to the selected folder                                                                                                                                                |
| MultiConnect          | Connect to all systems in the folder using the account selected from the easy account selection drop down box.                                                                     |
| MultiConnect Using... | Opens an additional context menu allowing for the user to select another account to use to connect to multiple systems. Is convenient when not wanting to change the easy account. |
| Edit                  | Change the folder details                                                                                                                                                          |
| Cut                   | Cut the Folder                                                                                                                                                                     |
| Paste                 | Paste folder where selected in the Folder Hierarchy.                                                                                                                               |
| Remove                | Deletes the folder (note the folder cannot be deleted while there are servers in it).                                                                                              |



When right clicking on a server the following context menus are presented: -

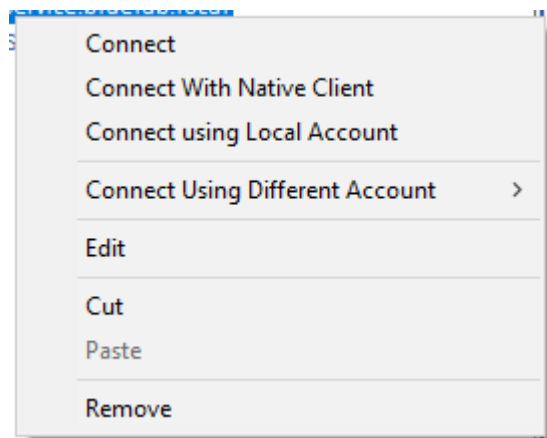
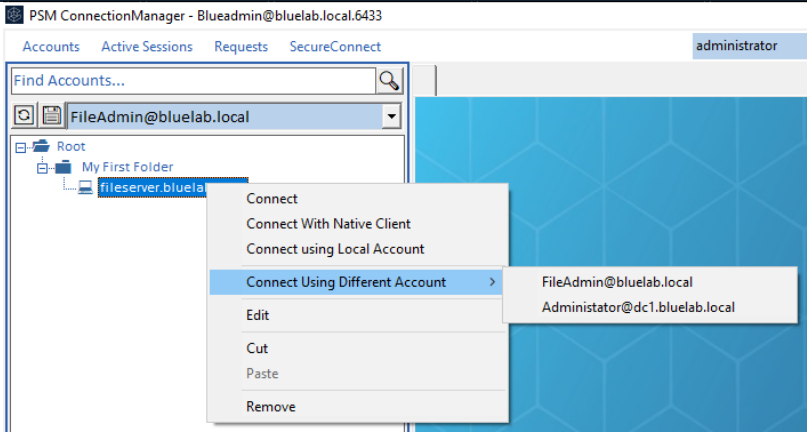


Figure 45. CustomView Context Menu; Servers

| Option Name                      | Details                                                                                                                                                                                                                                                              |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Connect                          | Will use the account from the easy account selection drop down box. These are the accounts that are linked to a Windows Domain Platform and have been favoured by the logged-on user.                                                                                |
| Connect with Native Client       | Will open the PSM Session via the MSTSC (Remote Desktop Client).                                                                                                                                                                                                     |
| Connect using Local Account      | <p>Looking at the server address, the Client will open a picker of accounts associated with the target system that have been onboarded to the Vault.</p> <div data-bbox="690 1182 1305 1383"></div> <p>Select the appropriate account and click “OK” to connect.</p> |
| Connect Using Different Accounts | A sub menu opens where Domain based accounts the user has access to are shown. This menu is a convenient option and overrides the selected account in the picker at the top of the Directory Tray.                                                                   |



|        |                                                                                    |
|--------|------------------------------------------------------------------------------------|
|        |  |
| Edit   | Let's you edit the server details                                                  |
| Cut    | Let's you cut the server to be pasted into another folder                          |
| Paste  | Pastes the server that was cut to the selected Folder                              |
| Remove | Deletes the server from the hierarchy.                                             |



### 1.8.7 Double Click and Multi-Connect

When you double click a server in the CustomView, you will connect to the target using the account from the easy account selector.

Below you will see the result of a double click.

Remember, the Easy Account Selector uses your **Favourited DOMAIN Accounts**.

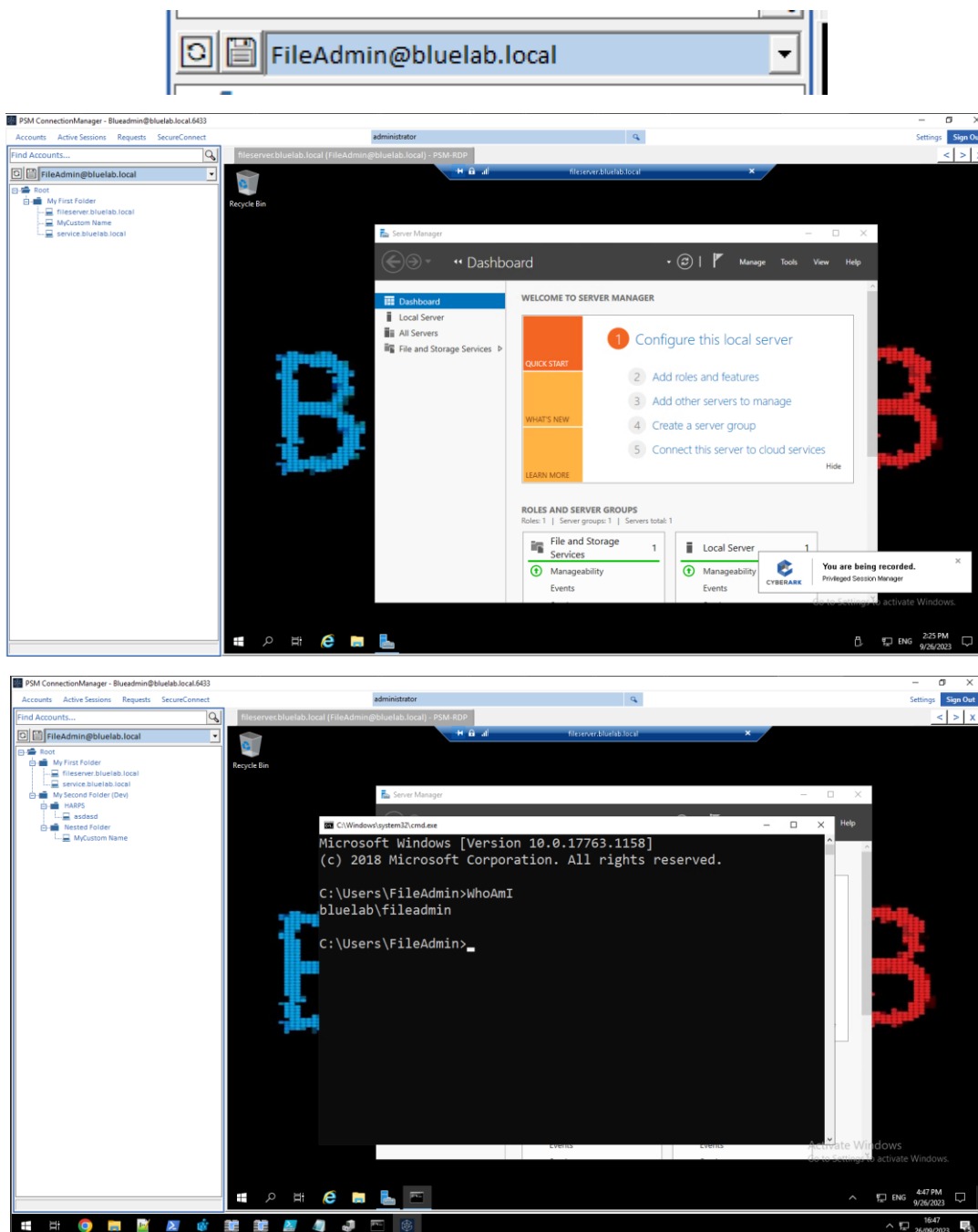


Figure 46. Double Click from Custom View with Easy Selector Account



You will also be able to start multiple sessions at the same time using “MultiConnect”. To do this, right click on the folder and select “MultiConnect”.

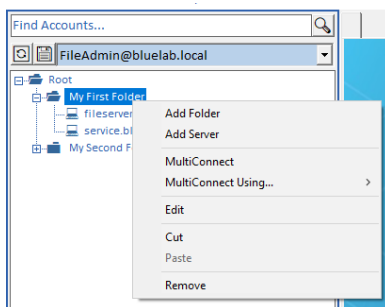


Figure 47. Multi Connect from folder.

After clicking, you will be asked to confirm the connection.

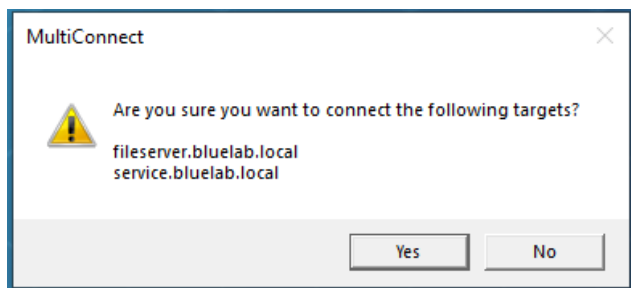


Figure 48. MultiConnect Prompt

Clicking Yes will Proceed to open multiple connection Tabs. Typically these open one after another.

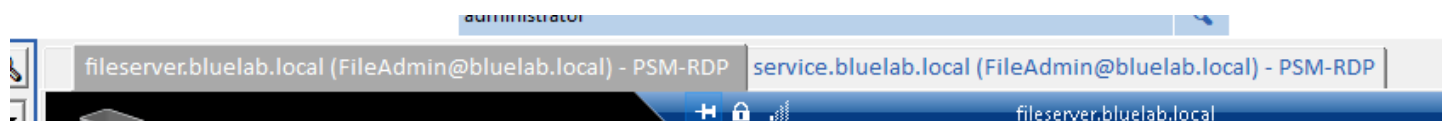


Figure 49. MultiConnect Tabs; With Username of Easy Selector

You will notice that the tab contains the name of the user from the easy selector.

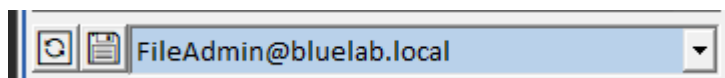


Figure 50. Easy Account Selector Example

As mentioned previously, you can also select another account to connect with from the context menu, for convenience.

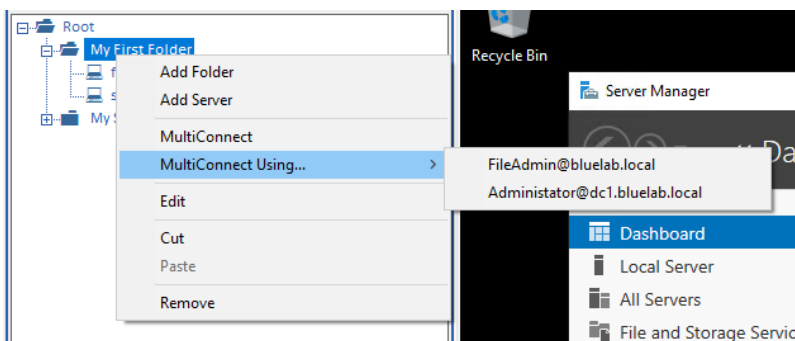


Figure 51. MultiConnect with different account from Easy Selector



### 1.8.8 Local Account Connections from CustomView

Similar to the other pre-defined views, right clicking on one of the servers in custom view will present the option to connect using Local Accounts.

You can select these from the picker presented.

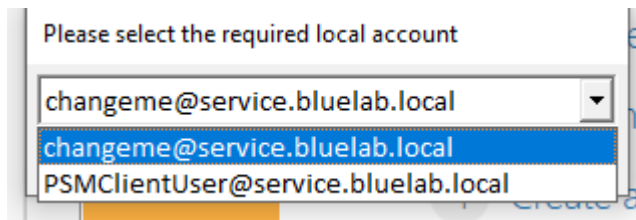


Figure 52. Local Account Picker



## 1.9 PSM Easy Connect

### 1.9.1 Easy Connect Installation Steps.

- Download the client from the Marketplace.
- Extract the zip file to a folder called: "PSM EasyConnect" on your computer. (See Below, *Figure 1*)
  - The zip file contains one exe file, PSMEasyConnect.exe



NOTE: You do not have to configure the Config file directly, all of that will be done via the Executable. This is created after first use.

- Create a shortcut on the users desktop, start menu, or pin to the taskbar for easy access.

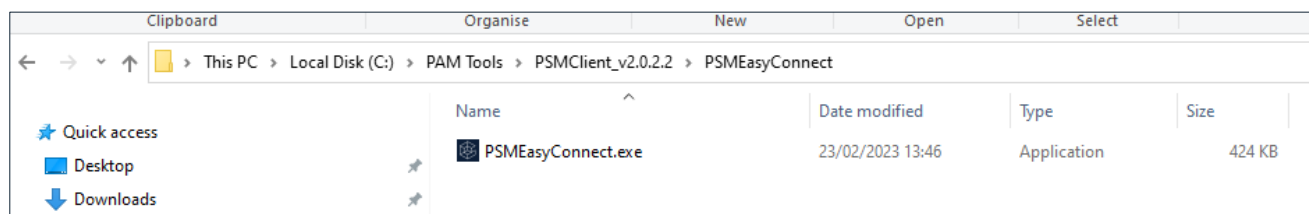


Figure 53: Extracted Easy Connect from the PSMClient.zip

### 1.9.2 Easy Connect Settings

- Start PSMEasyConnect.exe and fill in the parameters. (See Figure 2)

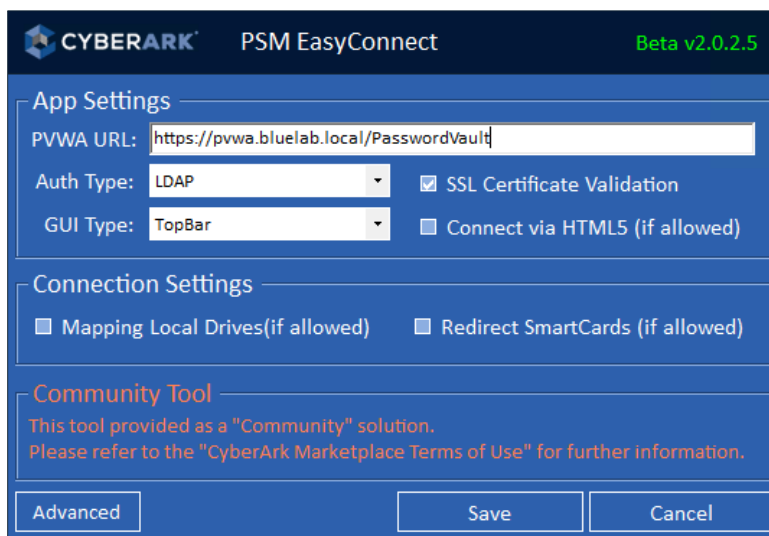


Figure 54: Easy Connect Settings UI

- Once open, fill in the following configuration parameters:



| App Settings                              |                                                                                                                                                                                                                              |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PVWA URL</b>                           | The URL for your PVWA, (e.g., https://mypvwa.local/passwordvault)                                                                                                                                                            |
| <b>Auth Type</b>                          | <ul style="list-style-type: none"><li>▪ LDAP</li><li>▪ SAML</li><li>▪ CyberArk</li><li>▪ Radius</li><li>▪ PKI</li><li>▪ PKIPN</li></ul>                                                                                      |
| <b>SSL Validation</b>                     | This enables SSL Validation from the client to the PSM Server<br><i>NOTE: "Yes" is recommended</i>                                                                                                                           |
| <b>Connect Via HTML5 (if allowed)</b>     | If users access targets via the HTML5 Gateways, select this box.                                                                                                                                                             |
| Connection Settings                       |                                                                                                                                                                                                                              |
| <b>Mapping Local Drives (If enabled).</b> | If the PSM Connection Component allows mapping local drives, this enables this feature.<br><br>NOTE: If it is disabled on the Connection Component, this will NOT enable it.                                                 |
| <b>Redirect Smart Cards (If enabled).</b> | If your environment uses Smart Cards (or CAC or PIV cards) to logon to target machines that are redirected to the PSM servers during the RDP connection, ensure you check this box.                                          |
| <b>Extra</b>                              |                                                                                                                                                                                                                              |
| <b>Advanced (Button)</b>                  | Clear Browser Cache<br><br>If during a session there is a need to clear the cache without closing the application first, use this option.<br><br>The Cache is cleared both on program launch and normal program termination. |

- Click "Save" and the configuration will be saved, and the application will start.
- Below is an example of a user logging in via CyberArk Auth and using "Top Bar" mode to find an account.

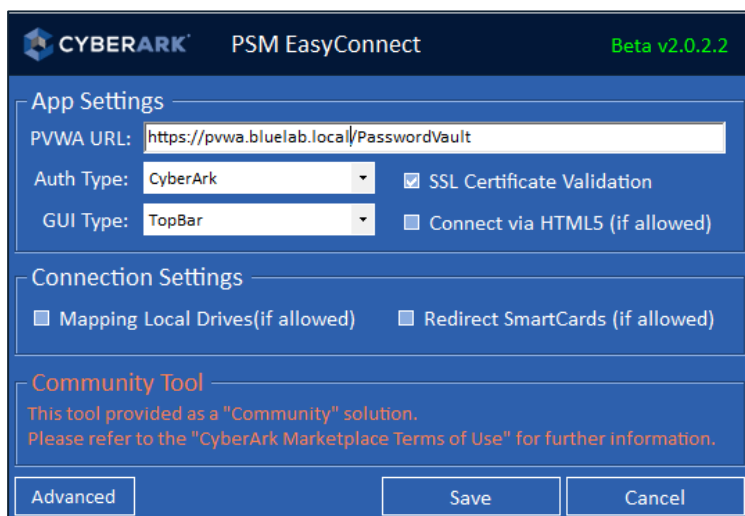


Figure 55: PSM Easy Connect Settings UI configured.

Once you click "Save" the login screen should appear. Use the same credentials you used to log on to the CyberArk PVWA with the same authentication type from the PVWA configuration.



Figure 56: PSM Easy Connect bar with logon required.

If the login prompt cannot be seen, simply click the windows notification banner to bring it to the foreground.

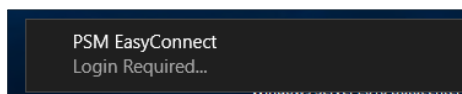


Figure 57: PSM Easy Connect windows notification banner.

### 1.9.3 Search Bar “Top Bar”

After launching the application, the Top bar will appear in the centre, at the top of the screen. The grey bar below allows the bar to be minimized.



Figure 58. TopBar Example



Search for the specific user, Address, Platform, or searchable Category and then click ENTER.

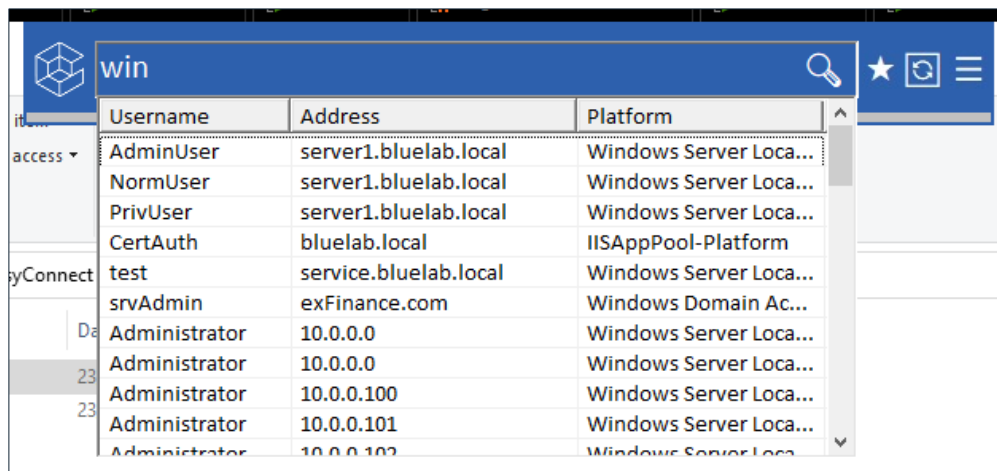


Figure 59. TopBar Search

Choose the relevant privilege user and connect to the target system by clicking. This will use the Default connection component for the account, defined in the platform.

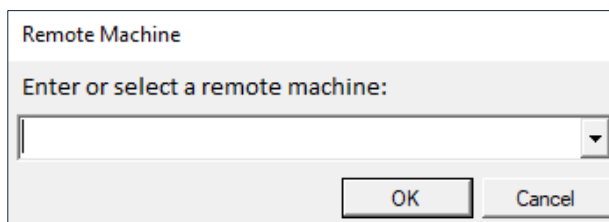


Figure 60. Connecting to a Target with a Domain account

The context windows allows for the target server name, or IP to be entered. The drop down will also offer previously populated server addresses.



**Want to make the TOP Bar appear without clicking? CTRL+ALT+C**



### 1.9.4 Favorites

Right Click an Account to see the default connection or select a different connection component. Here an account can be marked as “Favorite” and details of the account can be reviewed.

Right clicking an account that is already a “Favorite” will give you the option to “Remove from Favorites”.

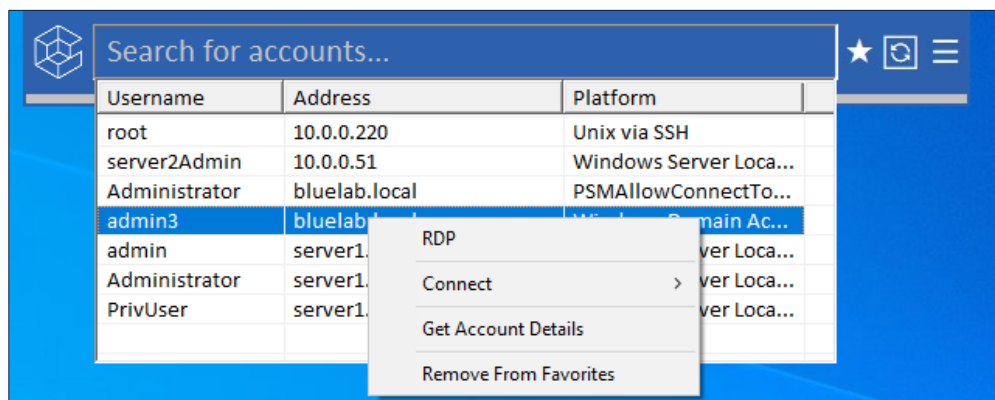


Figure 61. Favorite an Account

The star  will select accounts that have been marked as favourites in the PVWA.

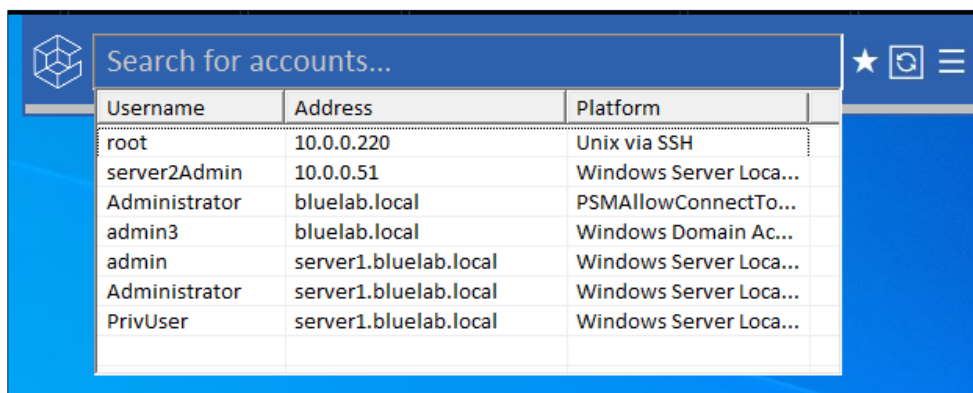


Figure 62. Favorites Accounts

Account Details will present you with the following results.

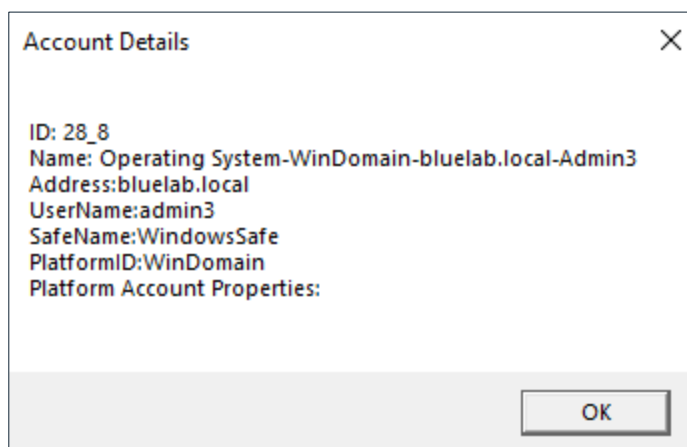


Figure 63. Account Properties

If you need to **update or change any of the settings**, clicking the three lines  icon will open a context menu. You can right-click on the icon of PSM Easy Connect in the System Tray to get the same.

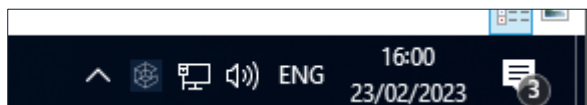


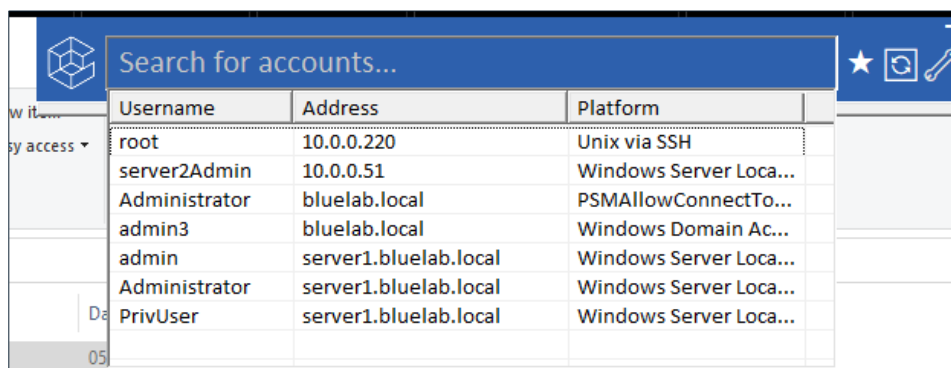
Figure 64. Task Tray Icon

### 1.9.5 Sort and Organise

After finding an account, you can use the headers of each column to organise the results in ascending or descending order.

E.g., Clicking username

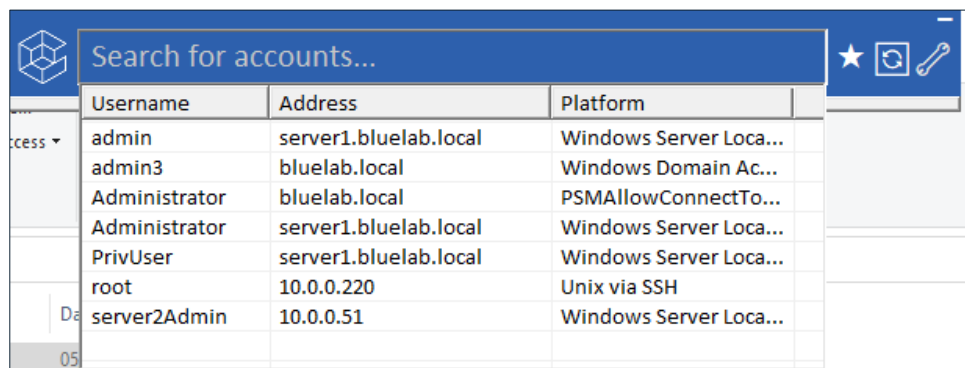
**Before**



| Search for accounts... |                       |                        |
|------------------------|-----------------------|------------------------|
| Username               | Address               | Platform               |
| root                   | 10.0.0.220            | Unix via SSH           |
| server2Admin           | 10.0.0.51             | Windows Server Loca... |
| Administrator          | bluelab.local         | PSMallowConnectTo...   |
| admin3                 | bluelab.local         | Windows Domain Ac...   |
| admin                  | server1.bluelab.local | Windows Server Loca... |
| Administrator          | server1.bluelab.local | Windows Server Loca... |
| PrivUser               | server1.bluelab.local | Windows Server Loca... |

Figure 65. Organiser Example 1

**After**



The screenshot shows the 'Organiser' window in the CYBERARK application. It features a search bar at the top with the text 'Search for accounts...'. Below the search bar is a table with three columns: 'Username', 'Address', and 'Platform'. The table contains several rows of account information. To the left of the table, there is a sidebar with a tree view showing a hierarchy of folders, including 'Access' and 'Data'. To the right of the table, there are icons for adding, refreshing, and deleting accounts.

| Username      | Address               | Platform               |
|---------------|-----------------------|------------------------|
| admin         | server1.bluelab.local | Windows Server Loca... |
| admin3        | bluelab.local         | Windows Domain Ac...   |
| Administrator | bluelab.local         | PSMAllowConnectTo...   |
| Administrator | server1.bluelab.local | Windows Server Loca... |
| PrivUser      | server1.bluelab.local | Windows Server Loca... |
| root          | 10.0.0.220            | Unix via SSH           |
| server2Admin  | 10.0.0.51             | Windows Server Loca... |

Figure 66. Organiser Example 2

## 1.10 Final Note

If you find this tool useful, please leave a review!

If you have any problems with the Client or Easy Connect, please comment in the [CyberArk Community](#). Use the template below for your comments:

**TITLE:** PSM Connection Manager: <Problem Description>

**BODY:** <What the Problem is / What you would like to see> <What the error is, if this is the reason for the comment>

We appreciate the time you take to review this tool on the Market place page.