



Online Password Manager for Workgroups

Getting Started Guide

Passpack Administration

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Introduction

Congratulations! You're about to take an important step in protecting one of your company's most important assets: its passwords. We're thrilled you've chosen us as your partner. We believe you'll find Passpack a big relief from day one, and hope it'll become an integral part of your business as you grow.

When used correctly Passpack is an important tool in your collaboration toolbox. It'll reduce time spent on solving password issues and let you securely interact with customers, partners and staff. As a bonus, it'll also automatically log you and your entire staff into websites with the click of the *Passpack It!* button.

This guide will take you through the basic steps to get your business account properly set up as a shared centralized password repository.

While Passpack is a stable, fully-working software, we are constantly working to improve it. So please let us know anything we can do to make password management easier for you and your company. And of course, should you have any questions, please don't hesitate to ask for help: <http://help.passpack.com/contact>

Wishing you happy packing,
The Passpack Team

“ Thank goodness you no longer have to choose between bloated Single Sign On systems, and spreadsheets. Passpack fills the gap with affordable password management for businesses of *all* sizes.

- Tara Kelly, Passpack Founding Partner

Browser Requirements

Passpack aims for compatibility with most popular modern browsers, and has been tested on the latest stable versions of **Google Chrome, Opera, Firefox, Safari, Internet Explorer 7+**. Other browsers may also work just fine, however we do not test for them specifically. Passpack also has limited support for Internet **Explorer 6**, though we recommend you use it only in situations in which you have no other choice – it is extremely slow and not all features are available.

You may access Passpack with **iPhone, iPad, Android** or other smart phone at <http://m.passpack.com>

Things to Have On-Hand

We're assuming that you're following this guide because you are setting up the main password repository for your company, and you plan on provisioning passwords to other people inside and/or outside your organization. To achieve this goal quickly, you should have the following items on hand:

- **List of emails** for all the people you'll be sharing with.
- **A CSV file** with all your passwords.
 - If you already use a different password manager, you can likely export them from there.
 - If you are currently using a spreadsheet, you should be able to “save as” a CSV file.
 - If you're not using any system yet, you can collect all your passwords into a spreadsheet and save them as a CSV, as an intermediate step.
- **A printer.** We *highly* suggest you print your Passpack login credentials.

You may also want to give some thought as to how you'd like to set up your Shared Users and Groups. See the next section, [Some Basic Concepts](#), for more information.

With these items ready, it should take you less than an hour to be completely up and running.

Payments & Billing

Passpack accepts all major credit cards, as well as PayPal payments. You need only purchase *one* upgrade for your entire company. All your clients, partners and employees are welcome to use Free accounts.

You must first sign up for a free account, then go to **Account > Packages & Pricing** to upgrade to a premium version. You'll make your payment during the upgrade. From the moment of payment, all accounts also have a 30 day money back guarantee.

You may download your paid invoice from **Account > Billing & Invoices** menu in your account.

Getting Acquainted

Shared Users, Groups & Permissions

Passpack gives you a set of tools to organize and distribute your passwords according to your specific needs.

- **People** – contacts you can communicate with via secure messages, or add to your Shared Users. You may have an unlimited number of People in your account.
- **Shared Users** – contacts that you have chosen to actively share passwords with. This may be in order to provision passwords to employees (each employee would be a Shared User), or to collaborate with external partners (each partner would be a Shared User). The number of Shared Users you may activate depends on the Passpack upgrade you purchase.
- **Groups** – for organizing your Shared Users. Good candidates for groups are, for example, all users in a certain department or all users involved with a certain client or client project. The number of Groups you may create depends on the Passpack upgrade you purchase.
- **Permissions** – “view only” or “view & modify”. Permissions are set on a per-password basis. When you share with a Group, everyone in that group will be assigned the same level of permission.

Example: Sharing with the Sales Department

You can share your passwords either with single Shared Users, with an entire Group, or both. For example, if Sally, Sean and Sam all work in the sales department, create a group called **Sales** and assign Sally, Sean and Sam to it. You can then share as many passwords as you'd like passwords with the **Sales** group and they'll automatically appear in Sally's, Sean's and Sam's accounts. Whenever a password is updated or deleted, those changes will also be immediately reflected in Sally's, Sean's and Sam's accounts.

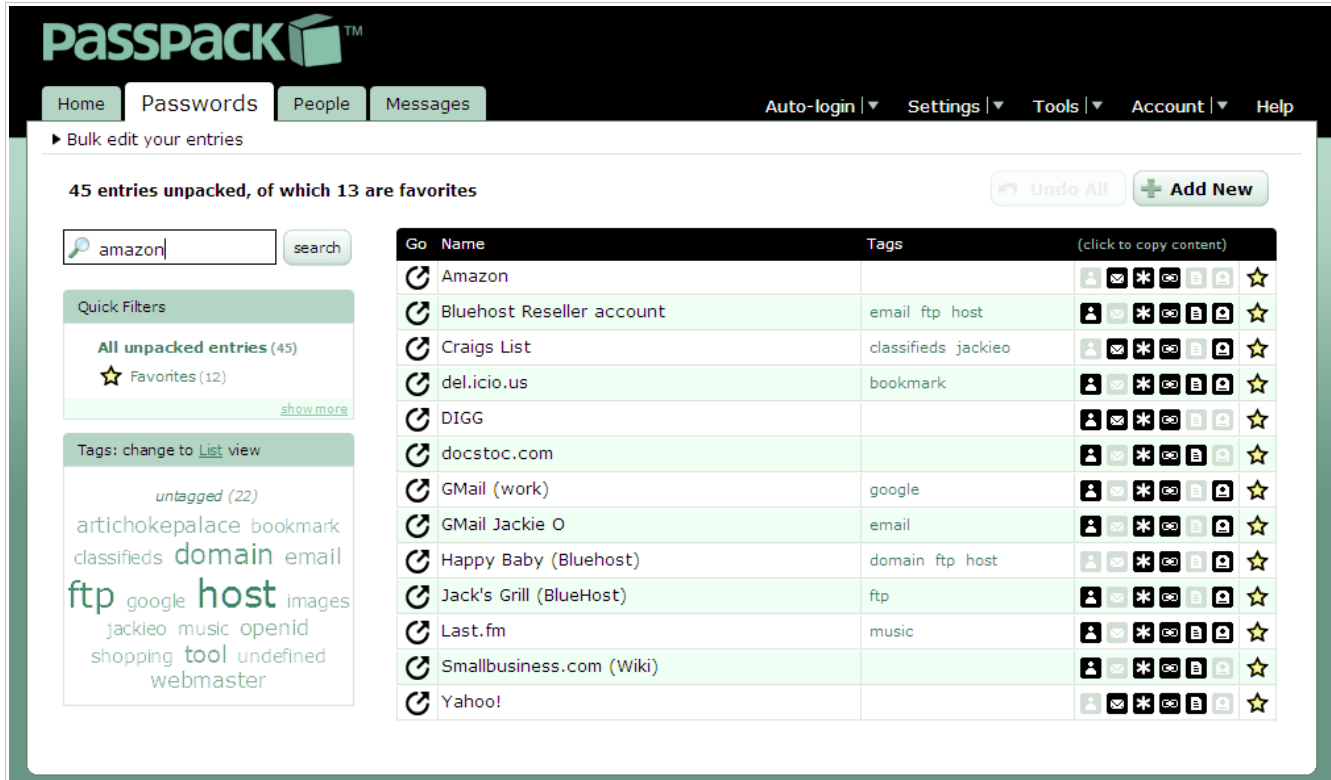
Should someone quit, just remove them from the **Sales** group and they'll no longer have access to those passwords. When you hire a replacement, add them to the **Sales** groups and all sales passwords will automatically appear in the newcomer's account.

Let's assume you choose to give the group **Sales** “view only” permissions - that means Sally, Sean and Sam can see the passwords, but they can't change them. Let's also assume that you have two other people who need access as well. For example, Jane is the head of the sales department and so needs complete “view & modify” permissions to all sales passwords. Plus, John the IT guy needs “view only” access for a couple of passwords, but the rest he shouldn't see at all. Below is a sketch of what all that would look like:



Your Password List

The **Passwords** tab is where you can see your list of password entries. From here you can delete entries, add new ones or modify existing ones.



The screenshot shows the Passpack web interface. At the top, there is a navigation bar with tabs for Home, Passwords, People, and Messages. On the right side of the navigation bar, there are links for Auto-login, Settings, Tools, Account, and Help. Below the navigation bar, there is a section for bulk editing entries, with a status bar indicating "45 entries unpacked, of which 13 are favorites". There are buttons for "Undo All" and "Add New". On the left side, there is a search bar with the text "amazon" and a "search" button. Below the search bar, there are "Quick Filters" for "All unpacked entries (45)" and "Favorites (12)". There is also a "Tags" section with a "change to List view" button and a list of tags including "untagged (22)", "artichokepalace", "bookmark", "classifieds", "domain", "email", "ftp", "google", "host", "images", "jackieo", "music", "openid", "shopping", "tool", "undefined", and "webmaster". The main content area is a table with columns for "Go", "Name", "Tags", and "(click to copy content)". The table lists 15 entries, each with a refresh icon, a name, a list of tags, and a set of action icons (person, eye, star, etc.).

Go	Name	Tags	(click to copy content)
	Amazon		
	Bluehost Reseller account	email ftp host	
	Craigs List	classifieds jackieo	
	del.icio.us	bookmark	
	DIGG		
	docstoc.com		
	GMail (work)	google	
	GMail Jackie O	email	
	Happy Baby (Bluehost)	domain ftp host	
	Jack's Grill (BlueHost)	ftp	
	Last.fm	music	
	Smallbusiness.com (Wiki)		
	Yahoo!		

On the right-hand side of your list, you have various options for searching and filtering your password list, including tags. Clicking on any item in the list itself, will open the Entry Window for editing.

Personalize the number of rows and information shown in each row under **Settings > Appearance**.

The Entry Window

Each password is contained in a record called an *Entry*. Below is an illustration of the *Entry Window* – the popup form you will use to enter any passwords manually. Once you are set up, the majority of the time you spend in Passpack will be using the Entry Window.

The screenshot shows the 'Entry Details' window with the following fields and content:

- Name:** Bluehost Reseller account
- User ID:** jackieodesign.com
- Password:** [Scrambled] [show]
- Link:** https://www.bluehost.com/
- Email:** [Empty]
- Tags:** email ftp host

Buttons: Email to..., Delete, Cancel, OK

Notes (313 of 1280) [hide]

SUPPORT: (888) 401-HOST
https://www.bluehost.com/
jackieo@gmail.com


Google adWords PromoCode: 105664288943

CP USER..... jackieodesign
IP..... 100.100.1.1
FTP ftp://jackieodesign@100.100.1.1
/public_html
POP/SMTP.... mail.jackieodesign.com
TEMP URL.... http://100.100.1.1/~jackieodesign

- 1 Name** (required) - First, give each entry a name. This will be what you'll see in your password list.
- 2 User ID** - Enter the user id needed to login to the website (sometimes called login name or user name). Be sure to be case specific.
- 3 Password** - Enter the password for the website in the password field. To protect your password from spying eyes, it may be hidden (scrambled looking). To view the password, press the **show** button. To hide it, press **hide**. You can not change the password while it is hidden. When shown you'll see a compact password generator. Press **Suggest one** to make and fill a new password into the password field.

Quality 77

Suggest one: - 13 + abc ABC 012 \$^~ òïé

- 4 Link** - Use the Link field to paste in the URL (website address) where you log into the website. Once entered, you can click on the  icon to be taken to directly to the website. If you've installed a *Passpack It!* button, you'd then click it to automatically fill in the website's login form.
- 5 Email** – Enter the email address associated with this website.

6 Tags - Tags are one way that you can choose to search through and filter your password entries. You can enter as many as you like, and make them whatever you like. Those tags will appear in the entry, and in the tags pane to the left of your main list of password entries. Since everyone likes to organize their account in a different way, tags are considered personal, and are not be shared with others.

7 Notes – Add any additional information you may need here, up to 1024 characters.

Options Tab

You may set additional options for any entry. In most cases you will not need to change the defaults.

- An entry can be set as a **Favorite** or not. Favorite entries will appear in your password list with a yellow star next to them. They may also be used in combination with **Settings > Startup Options** to make large accounts (which central repositories typically are) load up more quickly.
- Every entry has a **Security Level** on a scale of 1 to 3, corresponding to the strength of encryption.
 - 1 is the lowest encryption (use for things like password-less bookmarks),
 - 2 is the default encryption and is strong enough for nearly all your needs (perfect for passwords and financial data),
 - 3 is the highest level of encryption and can be used when you feel you need better-than-the-best security (use for the access code to a nuclear power plant). Level 3 is heavy duty stuff, overuse may slow down your account. Again, 2 is the default and usually the best choice.
- Some websites, in particular gambling and “lifestyle” sites, use what's called **Basic Authentication**. Check this if the entry is for such a website, and you'd like to auto-login to it.

Sharing Tab

This is where Passpack does its magic. You may share an entry with single users or entire groups simply by ticking off the checkbox next to their names in the Sharing tab. For each person or group you choose to share with, you can also choose whether they can just view the entry, or modify it as well.

Modifying the sharing settings via the Entry Window is handy when creating a new entry to share right off the bat, or when making fine-tuned changes to a single entry's sharing. To handle share or un-share multiple entries at a time, use bulk sharing instead (covered later).

Owner Tab

When you create an entry, Passpack considers it “yours”: you are the owner. Similarly, when someone else creates an entry from within their account, *they* are considered the owner. Since your staff may often need to create entries on behalf of the company, Passpack allows for the transfer of ownership of entries by choosing a name from the combobox in the Owner tab. This may be done at the time the entry is created, or anytime thereafter.

Creating Your Company Account

To create your company account, go to <http://passpack.com> and sign up for the package which best suits your needs. The registration process is 2 steps.

1. Choose Your User ID, Password & Email

Providing your *Email* is optional but highly recommended. Without a confirmed email associated with your account, we may not be able to provide you with complete customer service.

2. Choose Your Packing Key

The Packing Key is “what protects your data” so choose a good one. We suggest using a sentence because it's both strong, and easy to remember. The longer the better, using spaces or punctuation is a good idea. As you type, notice the quality bar under the field which indicates how strong your Packing Key is. Try to achieve a quality rating of 80 or better. Examples of strong Packing Keys:

- Fresh string beans taste better when they're green.
- My first job as a twelve year old was cutting potatoes.
- Who said Elvis has left the building?

After choosing your Packing Key, you have immediate access to your new Passpack account.

Before proceeding you may also want to:

Print Your Packing Key

Your Packing Key is the most important key in the entire Passpack system. It is known by you, and only by you, and you will have to type it often. It is what protects all of your passwords and keeps them private both while in transit over the Internet and on Passpack servers. No Passpack staff member has access to anything you store in your account because no one knows your Packing Key. *If you lose it, we can not retrieve it and you may be locked out of your account forever.* No joke.

That would be a disaster right? Yes it would. That's why you should print it and keep it safe. In the **Home** tab inside your Passpack account, click the **Print your credentials** link.

Confirm Your Email

If you provided an email during registration, you'll receive a confirmation email from Passpack. Just click on the link in that email and you're all done. In the event the link isn't working for you, there is a *confirmation code* that you may enter manually under **Account > Manage Email**.

You do not need the confirmation code to login, it's a temporary code for email confirmation only.

Setting Up Shared Users

In order to take advantage of the sharing and collaboration features, you first need to go through a short activation screen. You need only do this one time. Click on your **People** tab.

Choose Your Nickname

This is the name you need to tell people so that they can invite you to connect with them.

Please choose your name carefully.
You can not change it later.

↓

1 Nickname

You can use letters, numbers, periods, dashes and underscores.
The Nickname is NOT case sensitive. You can use your User ID if it's compatible.

2 Technical Question (ignore if you're not sure)
How would you like Passpack to generate your collaboration keys?

Generate the keys in the browser
It may take a few seconds, or up to a minute, to complete.

Generate the keys server side
This option relies on the server to create the keys because your browser or computer is too slow.

1 Type in a *Nickname* which will be used to identify the main repository to the other people you'll be collaborating with. You may want to use your company name.

2 Choose **Generate the keys server side** if you use Internet Explorer or have a slow computer. Otherwise, leave the default **Generate the keys in the browser** selected. If your browser prompts “Do you want to stop the script from running?” Say “no” and be patient, there is some complex cryptography happening right now. You only have to wait this long once during set up. However, if your browser appears to completely freeze, stop the process and switch to the **Generate the keys server side** option.

3 We suggest you logout of your account, then log back in before proceeding.

Getting Your Team Connected

1. Everyone Gets a Passpack Account

First step is to get your staff signed up. Each person will sign up for a Free Passpack account and choose a Nickname. You may use the template email below which contains some useful links for them.

Hello.
We're going to start using a product called Passpack to manage passwords. To get set up, I need you to do two things. It should take about 5-10 minutes.

1. Sign up for a Passpack account here: <https://www.passpack.com/signup/>
2. Follow these instructions to activate the collaboration features. You'll have to pick a Nickname which you're going to have to tell me, so please choose something appropriate: <http://help.passpack.com/knowledgebase/idx.php/0/107/>

When you're done, email me with the Nickname you chose in step 2, and I'll take care of the rest.

Thanks!

2. Populate Your People Tab

As you receive the Nicknames they've chosen, you may invite them to connect. Click the **People** tab, then press the **Invite Someone** button. On the popup screen, type in the Nickname and add a short note to identify yourself. Since you are connecting with someone who will then have access to your company passwords, and vice versa, Passpack must ensure that a true trust relationship exists between you two. They must *explicitly* accept your invitation before you can proceed.

3. The Preliminary Chat

When the person on the other end receives your invite, they can choose to accept it right away, or they may ask you some more questions to make sure it's you. This chat should be used only to assure each other that you're adding the right person. At any time, you can click the **Manage Invite** link next to the person's name in your **People** tab. Here are some actions you can take from within the invite history:

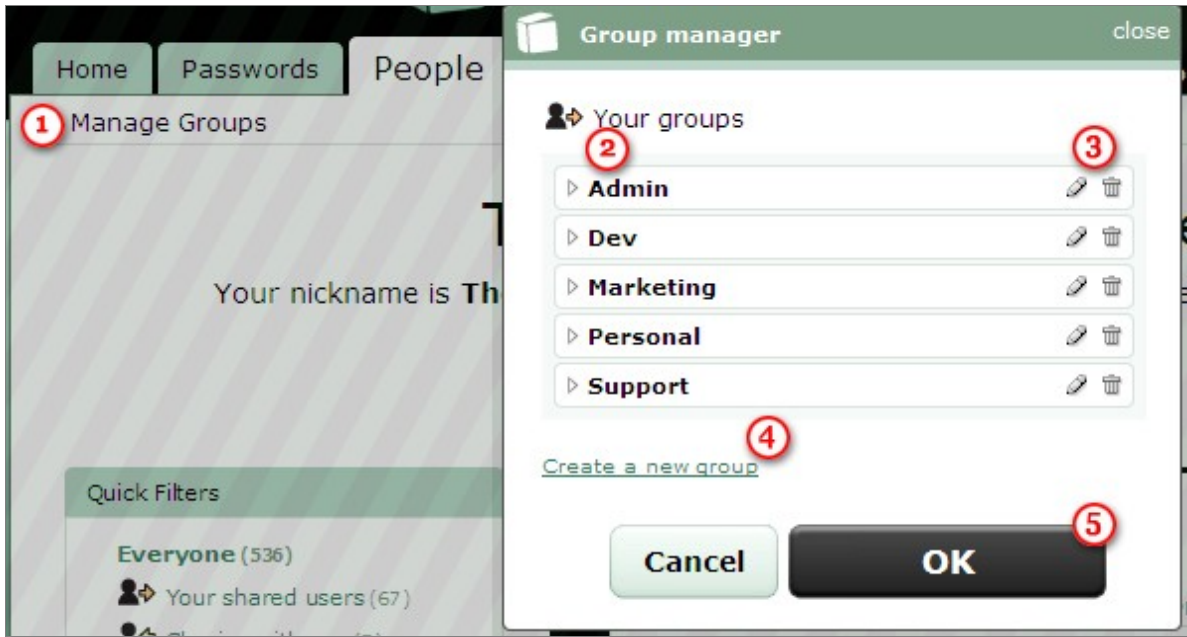
- **Revoke Invite** – if you originally sent the invite, and have since changed your mind.
- **Accept** – if you received an invite that you would like to accept.
- **Refuse** – if you have received an invite that you do NOT want to accept.
- **Reply** – allows you to continue the chat.

4. Convert to Shared Users

Once the invite has been accepted, click the **Start Sharing** link next to their name in your list of People. An orange **SHARING** tag will be appended before their name.

Creating Groups

You should create Groups for departments or teams that will frequently share common passwords. To add a new group, or to manage your existing ones, click the **Manage Groups** link just underneath your **People** tab (1). This will open a popup window similar to the one shown below.



2 List of existing groups. Use the arrow next to the name to see all the shared users assigned to that group. If the arrow does not appear, the group is empty.

3 Use these controls to modify the name of the group, or to delete it. Any entries that had been shared with that group, will be unshared from all users assigned to the deleted group (the entries will disappear from their accounts). One exception would be in the event a user *also* belongs to a different group which also has access to the same entries.

4 Click **Create a new group** and you will be able to add a new group to the list.

5 Click **OK** to apply all your changes. If you have deleted any groups with users or entries in it, you may have to wait a moment while Passpack propagates all the changes. Please remember Passpack uses very secure, very heavy encryption, so it may take just a moment.

6 Again - we suggest you **logout of your account, then log back in before proceeding.**

You can add more Groups, remove or rename them as your organization changes.

Import Your Passwords

Passpack lets you quickly import passwords from any other password manager with the standard *Comma Separated Values* (CSV) format. It takes longer to explain than to do, so don't get put off by the length of this section. Since not all programs use the CSV format, we've also built-in some helpers for:

- KeePass Password Safe XML
- Roboform Logins/Passcards
- Clipperz JSON
- Password Plus

Open your exported password file. Select all and copy the text, then go to **Tools > Import** in your Passpack account. Select either the **Comma Separated Values** or the name of the password program you have exported from. Press **Continue** to proceed to the next screen.

Import Passwords from Standard CSV format

Copy the text from your file and paste it in the field below.
Your imported entries will be added to your account - current entries will not be removed.

Choose the field separator

Choose the field delimiter

Click on the name of the first value.

Name	User ID	Password	Link	Tags	Notes	Email

If you don't select anything, all the fields will be used in default order.

Skip header row

1 Paste your copied text into the large textbox.

2 3 You will only see these options when importing a standard CSV. Despite the name (Comma Separated Values), the CSV format is often loosely interpreted. Your data file may use actual commas to separate the fields, or it may use tabs, semicolons or some other character. Have a look at your CSV file and check to make sure that it actually uses commas. If not, make any needed adjustments here.

4 Your next step is to put the values in order. To put the fields in the proper sequence, just click the black boxes in the order you'd like them to appear and they will move into the slots below. If you're not sure what the order should be, have a look at the first line of text from your CSV and you'll surely be able to make some sense of it. For example, if the first line of the file looks like this:

```
Amazon,tarak,9djn3y728s,http://www.amazon.com,shopping
```

Then you can be pretty sure that *Amazon* is the *Entry Name*, *tarak* is the *User ID*, *djn3y728s* looks like the *Password*, *http://www.amazon.com* is clearly the *Link*, *shopping* is a category so that'll be a *Tag* in your Passpack account, and there does not appear to be any *Notes* or *Email*. Here's what the ordered fields should look like for this example:

Click on the name of the sixth value. ([start over](#))

Notes	Email					
1: Name	2: User ID	3: Password	4: Link	5: Tags		

It's OK that the *Notes* and *Email* values were left unclicked. You are not required to use them all. If you make a mistake, just click the **start over** link.

5 Sometimes the first line of your file will actually be a description of the values. That will make choosing the order much easier. In this case, you should also tick the **Skip header row** checkbox. This will keep Passpack from importing those labels as if they were a real password entry.

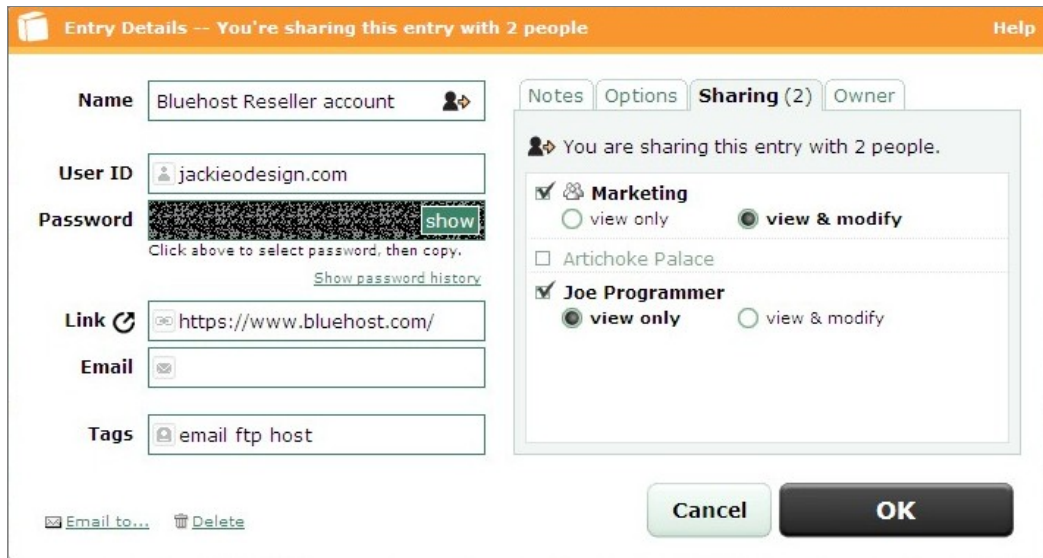
Once you're ready, press the **Continue** button. If there are any problems, this is when Passpack will let you know. If it's anything you can't figure out, just ask for help. If everything is ok, Passpack will take you to the next screen with a preview of your data.

Make sure that the values are in the order you expect them to be. If so, press **Continue** and they will be added to your Passpack account. If you need to make changes, press **Cancel** and you can start over. Once you're done, press the red **Save All** button – this is important – then delete the export file from your computer.

Sharing Passwords

One By One

Click on an entry in your password list to open the Entry Window. On the right-hand side, you'll see some tabs. Click **Sharing**. You'll then see a list of people and groups that you can share with. Tick the checkbox next to a name and two additional options will appear.



Choose **view only** and you will allow the person to see and use auto-login for the password, but not make any changes (this is the default). Choose **view & modify** to allow the other person to make and save changes to your entry. Press the **OK** button when you're done. From this point onward, any changes made to the entry will automatically be available to all shared users and groups.

Entries that you have shared with others, are orange – this corresponds to the orange **SHARING** tag in your password list. Entries that have been shared with you *by* others are black, and have a corresponding black **SHARING** tag in our password list.

Bulk Sharing

You can access the bulk editing features in your **Passwords** tab by clicking on the link **Bulk edit your entries** located directly underneath it.

To share multiple entries, you must first select them. To locate the entries you'd like to select, you may use all of the usual navigation tools. Once you have located an entry, tick the checkbox to the left of the entry name. When you have completed your selection, choose **Share selected entries with...** from the **Apply an Action** menu to the top right of your selected password list.

More Popular Features

Auto-Login to Websites with *Passpack It!*

To login to a website with the *Passpack It!* Button, first make sure you have installed it. Go to **Auto-login** > **Install your Button**, then drag the button you see on the screen up into your browser bar. Most of the time it's easy enough, but if you have troubles installing, read the instructions here: <http://bit.ly/ppinstall>

Once installed, there are two ways you may choose to use your button.

The Tried & True Click-Through Method

Do this once:

- Login to Passpack

Then do this every time you want to login to a website:

- Click on the 再 icon next to a password in your list
- The website will open in a new window or tab
- Navigate to the login page if you're not already on it
- Click your *Passpack It!* button ... and Passpack will log you in

1 Click Login While You Browse

Do this once:

- Login to Passpack
- Turn on 1 Click Login.
- You leave Passpack open in the background and browse the web at your leisure all day long.

Then do this every time you want to login to a website:

- Navigate the web as usual. Click your *Passpack It!* Button on a login page. Passpack will log you in.

If you'd like to skip some of these steps, you can play with a lot of different options. Read this article for more information: <http://help.passpack.com/knowledgebase/idx.php/1/166/>

Letting Staff Save Entries to the Central Repository

Whoever creates the entry is considered the *owner*. In order for your staff to save one of their entries to the central repository, they should use the Owner tab in the Entry Window. If there are many passwords to transfer at once, they may use the **bulk editing** mode.

You must explicitly accept a transfer of ownership. Whenever ownership is transferred to your main company account, you will see a **pending** option in your Quick Filters pane. Click this to see all entries pending acceptance. You may accept them one by one from within the entry window's **Owner** tab.

By default, the person who transferred them to you will maintain a copy in sharing. You may change this as you normally would change any sharing settings for an entry.

Making Large Accounts Load Faster

If you have a large account (with 50 entries or more), you may start to notice that Passpack is sluggish load up when you sign in. This is because there are many password entries to unpack (decrypt) all at once. To make Passpack load more quickly, you can set the most used entries as **Favorites**, then go to **Settings > Startup Options** and choose one of the options available for loading favorites first.

- Setting Favorites <http://help.passpack.com/knowledgebase/idx.php/0/118/>
- Setting Startup Options <http://help.passpack.com/knowledgebase/idx.php/30/143/>

Passpack Desktop & Backing Up Your Data

Frequent data backups are good practice. To make a backup of the password entries in your Passpack account, go to **Tools > Backup** and follow the on screen instructions. Backups are encrypted and so are safe to save on your computer.

Backups may be restored into your account under **Tools > Restore**. You may also want to download a copy of *Passpack Desktop* to use as a backup reader in the event you do not have access to Passpack.com.

Passpack maintains three downloadable copies on three different servers. This ensures you can always get a copy of Passpack Desktop – even in the rare event of a Passpack application outage. Here are the links:

- Download via Passpack.com <http://passpack.com/en/passpack-desktop>
- Download via Passpack Help Center <http://help.passpack.com/latestdesktop>
- Download via Adobe Marketplace <http://bit.ly/djkkQ3>

As an alternative to manual backups and restores, Passpack Desktop comes complete with a fast & simple synchronize feature. More information is available here: <http://bit.ly/ppsync>

Passpack Help is Free and Abundant

Customer Support

Check out the Help Center at <http://help.passpack.com> for plenty of how-to articles.

Should you or your staff need any one-on-one help, we'll be happy to oblige. Please use this form <http://help.passpack.com/contact> and we'll get back to you shortly.

Twitter users can also direct quick questions to [@passpackhelp](https://twitter.com/passpackhelp).

News & Updates

Passpack is continually improving, with new features and improvements monthly. To keep up on the changes, check out our blog at <http://blog.passpack.com>

Or subscribe to the Passpack newsletter for short n' sweet monthly updates straight to your inbox: <http://passpack.com/newsletter>

Your Suggestions

Have a great idea that would make Passpack even better? Want to make sure we stay on track with the features you need? Or just want to know what we've already got on the development roadmap? The suggestions forum is the place for you: <http://help.passpack.com/suggestions>

You can vote for features you want, comment and generally just make yourself heard.

Enjoy!