

# Getting Started with the Secrata Enterprise File Sync and Share Application

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 [secrata.com](https://secrata.com)

**secrata**   
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## Supported Secrata Accounts

The 2 primary types of Secrata accounts are “enterprise” and “external”. An enterprise user will automatically receive permissions to create workspaces, invite new members, and upload files. An external user will, by default, only receive permissions to view workspaces and download files.

Users logging onto the system using their enterprise credentials (either through AD/LDAP or ADFS/SAML) will receive Secrata enterprise accounts and privileges. User accounts automatically created for non-enterprise “external” usage will receive Secrata external accounts and privileges. These privileges can be modified by the Secrata Administrator using the administrative console.

This guide explains how a new user, depending on the account type and authentication method, can set up their account for the first time.

*Note: for information on specific clients, please visit [Secrata.com](http://Secrata.com) and select the appropriate guide for help*

## Account Types



### **External User**

An external user are typically those who reside outside of the Enterprise network and are non-employees. These accounts are automatically created when they are invited to a workspace. To logon on to the system, you will be required to use your e-mail address and Secrata *passcode*.

- 1 From the Welcome email, **click** the link to set up your unique Secrata Passcode
- 2 Once your passcode is set, you will be re-directed to the login screen
- 3 Enter your email address and passcode, click **Submit**
- 4 You will now be directed to the home screen and should see the content that has been shared with you



### **SAML User**

SAML account users are Enterprise users whose enterprise uses the SAML single sign on protocol to authenticate. After attempting to logon to the system using your enterprise e-mail address and password, you will be required to setup a second level authentication *passcode* with the Secrata system.

To login for the first time as a SAML user, follow the steps below to authenticate with the application in two steps.

- 1 Navigate to the Secrata Web Client by typing in the URL in your browser
  - 2 Click 'Login with my company credentials'
  - 3 After being redirected to the SAML Enterprise logon page, enter your SAML email address and password and click **Sign In** (these are your Enterprise credentials)
  - 4 A prompt will appear asking you check your e-mail for an invitation to set up your second level Secrata passcode.
  - 5 From the Welcome email, click the link to set up your unique Secrata Passcode.
  - 6 After setting up your Secrata Passcode, go back to the logon process and click "I just set up my passcode, please continue".
  - 7 A prompt will appear asking you to enter your passcode. Enter your newly-created passcode and hit "Log in"
- You should now see the Secrata home screen and both your Shared and Private workspaces.





### **AD/LDAP User**

AD/LDAP account users are Enterprise users whose enterprise is configured to have Secrata natively use the Enterprise's AD/LDAP authentication method. To login, please follow the steps below.

- 1 Navigate to the Secrata Web Client by typing in the URL in your browser
- 2 For username, **insert** your AD/LDAP username or your primary e-mail address.
- 3 **Enter** your AD/LDAP password as the Secrata Passcode and click **Login**
- 4 You will now be directed to the home screen and should see the Shared and Private workspaces screen

### **Forgot Passcode SAML and External Users**

- 1 From the home screen, click Don't know your passcode
- 2 Provide your email address and click Submit
- 3 From the email notification, click the link to reset your passcode
- 4 Insert your new passcode twice and click submit
- 5 You should now be able to login successfully to the client

***Note:** If you are an AD/LDAP user, please contact your system administrator to reset your Secrata Passcode*