

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

The Secrata Desktop App User Guide

The Secrata Desktop Application supports both MAC and Windows operating systems.

The Secrata platform supports 3 methods of authentication; the method used is determined by whether the user is an “Enterprise User” or an “External User”, and which strategy the enterprise is using to authenticate enterprise users (AD/LDAP or ADFS/SAML).

Note: this guide assumes the user has their account setup, for more info on setting up your account, please visit [Secrata.com](https://secrata.com) and select the [Get Started](#) link for help



External User

External users are those who reside outside of the Enterprise network and are non-employees. External users may have their permissions upped to enterprise grade, but only so at the direction of the Enterprise.

- 1 Launch the application by double clicking the Secrata icon from your desktop
- 2 Enter the email address associated with your Secrata account
- 3 Enter your unique passcode and click **Login**
- 4 You should now see your Secrata Home screen



SAML User

SAML account users will authenticate with the application in two steps.

- 1 Launch the application by double clicking the Secrata icon from your desktop
- 2 Click ‘Login with my company credentials’
- 3 Enter your SAML username and password and click **Sign In**
- 4 When prompted, enter your Secrata Passcode and click **Login**.
You should now see the Secrata Home screen

Note: If you do not know or have not setup your unique Secrata Passcode, click ‘Don’t know your passcode’ to have your passcode reset.



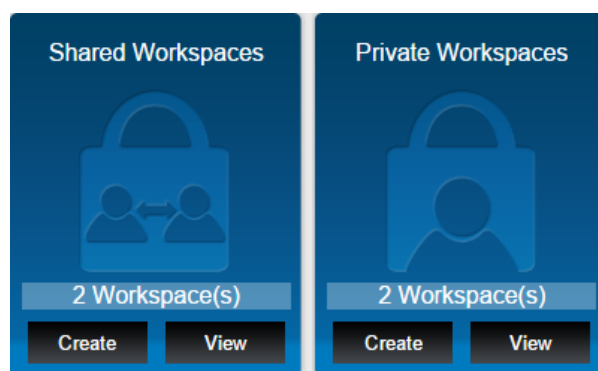
AD/LDAP User

AD/LDAP users are Enterprise employees and have AD/LDAP accounts. AD/LDAP users have full permissions within the clients by default.

- 1 Launch the application by double clicking the Secrata icon from your desktop
- 2 Enter your enterprise username
- 3 Enter your enterprise password and click **Login**
- 4 You should now see your Secrata Home screen

Understanding Shared and Private Workspaces

Once logged in, there are two functional areas on Secrata's main menu, Shared Workspaces and Private Workspaces. Shared Workspaces are designed to allow you to share content with others. Private Workspaces are not shareable; the content within those workspaces is only visible and accessible by you.



Creating Workspaces

- 1 From the home screen, click **Create** for either a Shared or Private workspace
- 2 Type in the **Name** and **Description** of the workspace
- 3 **Click** create workspace
- 4 You should be taken to the workspace view

Create New Shared Workspace

A Shared workspace is a location that holds files you want to share with others.

1. Enter a descriptive name for your new workspace.

(For example: Work Documents)

2. Enter a description for this workspace.

This description will appear in the workspace display.

(For example: Meetings, calendar and memos to workgroup.)

Create Workspace

Cancel

Setting up your Workspace

- 1 From the top row menu, click **Add Folder**
- 2 Insert the folder name and click **Create**
- 3 Select the folder you just created and click **Add File** from the top menu options
- 4 Select the file(s) you wish to add and click **Open**
- 5 You may also drag and drop one or many files into a workspace root directory or a folder within the workspace
- 6 To delete folders or files, you can either right click the folder or file or highlight the item you wish to delete and click **Delete Entry**

Files	Messages	Add Member	Add File	Add Folder	Delete Entry	Leave Workspace
sample@topiatechnology.com externaluser@gmail.com						
TCC Apartment Complex Project Proposal						
Content	Tags	Version	Owner	Size	Type	Status
Contract agreement					Folder	✓
tsp-70.pdf	DO NOT DELETE +	v2:2/7/2016 2:05:26 PM	sample@topiatechnolog	182.41 KB	application/pdf	✓

Understanding the Workspace Menu Options

- 1 Select a workspace by **Clicking** the workspace name
- 2 From here, you can add Members, messages, files or folders from the top row menu
- 3 To leave the workspace, click **Leave Workspace** from the top row menu

Files	Messages	Add Member	Add File	Add Folder	Delete Entry	Leave Workspace
sample@topiatechnology.com externaluser@gmail.com						

Messaging

Messaging is a quick and easy way to keep your team informed of the latest details.

- 1 Click the 'Messages' button from the top row
- 2 Type your message into the field
- 3 Click **Send Message**

Tagging

Tags can be either public or private and are great for searching through your documents.

- 1 Select the file you want to tag
- 2 Click the + symbol
- 3 Insert your tag and designate either public or private, then click **Add**
- 4 To close the box, click the X

File Tags

DO NOT DELETE

☐ Tag is Public
Public Tags are visible to all members of a workspace.

Other File Versions			
Other Versions:	Owner:	Size:	
v2:2/7/2016 02:05 PM	sample@topiatechnology.com	182.41 KB	X
v1:2/7/2016 01:01 PM	sample@topiatechnology.com	182.41 KB	X
			Close

Versioning

Versions are automatically created when a file with the same name is uploaded more than once. Versions allow you to retrieve previous versions of the document.

- 1 To retrieve a previous version of a file, select the file you wish to retrieve
- 2 Click the Version button
- 3 Select the version of the document and the download will begin

Managing Members

- 1 Active members of a workspace are listed at the top of the workspace and highlighted in blue; members who have been invited but have not accepted are highlighted in gray
- 2 To add a member, click **Add Member** from the top menu
- 3 Insert the primary email address of the user and click **Invite Members**
- 4 To invite more than one member, simply add a comma between the email address
- 5 To remove a member, click their **Name** and select **Remove Member**



Desktop Syncing and Offline Access



When a user first logs into the Secrata desktop client, automatically the content of the users workspaces will begin to sync



Once a file has been fully synced, a green check mark will appear next to the file



When a file is uploaded to the desktop client, the application will automatically sync the contents to the Secrata server



The client keeps an updated cache of the workspace content, this allows the client to access files in an Offline mode



To view the status of a file upload or download while in progress, click the icon in the lower right hand corner. This brings up the status of all current activity on the Secrata desktop application

