Getting Started with the Secrata Enterprise File Sync and Share Mobile Applications

Logging into the Secrata Mobile App

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 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 clicking the Secrata Icon
2	When prompted, specify the Secrata Server and tap **Submit**
3	Enter the email address associated with your Secrata account and tap **Next**
4	Enter your unique passcode and tap **Done**
5	Tap **Login** and 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 clicking the Secrata Icon
2	When prompted, specify the Secrata Server and tap **Submit**
3	**Tap** 'Login with my company credentials'
4	Enter your SAML username and password and tap **Sign In**
5	When prompted, enter your Secrata Passcode and tap **Submit.** You should now see the Secrata Home screen

Note: Prompt appears 1st time app is launched; users can modify the server address by clicking the link on the lower left hand side of the login screen

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 typing in your Secrata URL into your preferred browser
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

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 are only visible and accessible by you.

Creating Workspaces

1	**Tap** the + symbol
2	Name the workspace
3	Optionally add description
4	Determine private or shared
5	Tap **Create Workspace**
	To remove a workspace, **Swipe** right and tap **Leave**

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Create a New Workspace

> AGC Bldg Project

Add an optional description

> Contracts, safety documents and specific project details |

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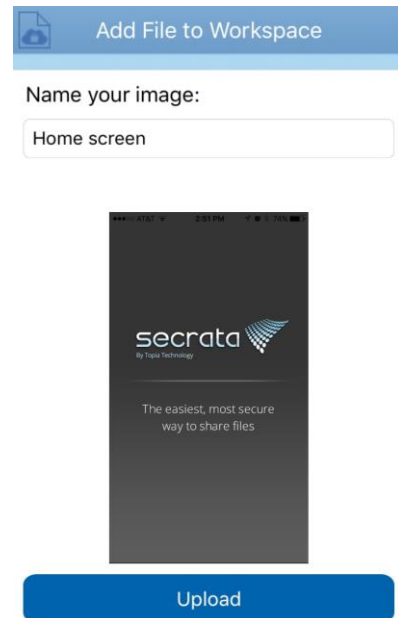
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Managing Folders

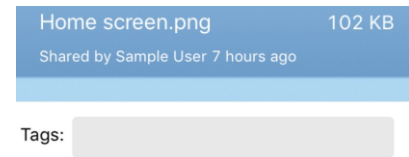|	
1	Select a workspace by Tapping the workspace name
2	**Tap** the add folder icon
3	Enter the folder name and tap **Create**
4	To delete the folder, Swipe right and **Tap** delete
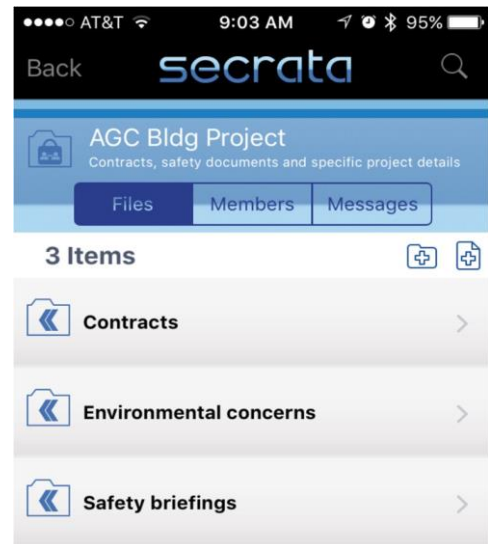
Uploading Files

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1	Select the folder to add a file to or add the file at the root level
2	**Tap** the add file icon
3	Select the content you wish to upload
4	Enter the name of the content
5	Tap the **Upload** button
6	To delete the file, Swipe right and **Tap** delete

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Home screen.png   102 KB
Shared by Sample User 7 hours ago

Tags:

Download this file using the
download button below

Version 1   Download

Downloading Files

1	Select the file you wish to download
2	**Tap** 'Download'
3	The file is now downloaded to the device
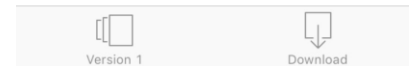
Members

1	Select the workspace to add the member
2	**Tap** 'members' from the top menu
3	**Tap** the plus symbol
4	Enter the invitee(s) email addresses
5	Optionally, add a custom message to the invitee
6	**Tap** send to invite the user(s) to the workspace
	To remove the user, **swipe** right and **tap** remove

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Invite Members

Invitees: externaluser@gmail.com

Message: Hey! All the information on our environmental concerns is securely available in this workspace.

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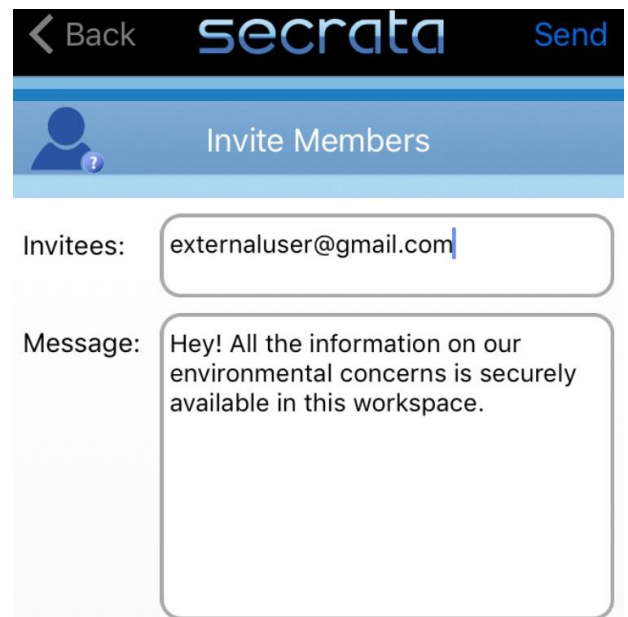
Searching

1	**Tap** the Search area on the home screen or hit the search icon in the upper right hand corner
2	**Search** by tags, files, folders or workspaces
3	**Tap** the item you searched for to be taken to the file, folder or workspace
4	**Tap** cancel to return to the home screen
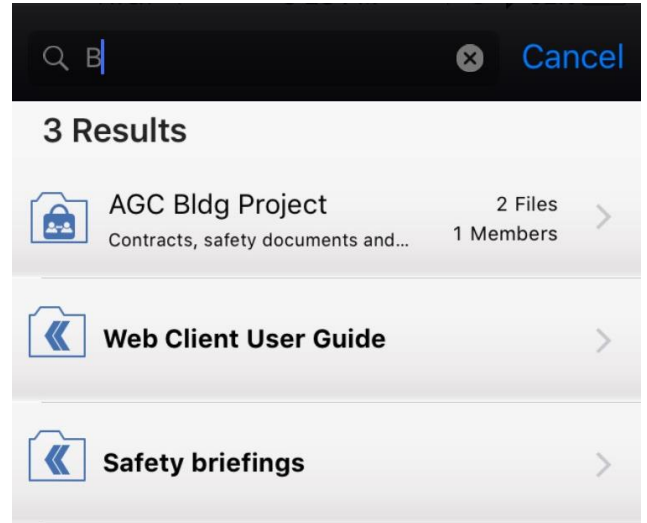
Messaging

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

1	**Tap** the + symbol
2	Type your message into the field
3	Click **Send** in the right hand corner

Tagging ^{Tags:}

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

1	Select the file you want to tag
2	Tap the gray area next to the Tags box
3	Select either private or public and click **Done**

Versioning

Versions allow you to retrieve previous versions of the document.

1	Select the file you wish to retrieve
2	**Tap** the Version button
3	Select the version of the document and the download will begin

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