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

The Secrata Outlook App User Guide

The Secrata Outlook Application supports Outlook 2013 and 2016. The Outlook application is a great tool for sharing secure documents both internally and externally. The Outlook client automatically creates users, workspaces and uploads documents so you the end user can continue working without interrupting your day.

Note: *this guide only applies to enterprise users who have already setup their account. If you have not configured your account, please visit Secrata.com for help*

Authenticating with Secrata

Once the client has been installed, launch your Outlook client. You will be prompted to enter your Username and Passcode or to login with your company credentials. If you are a non-SAML user, enter your enterprise username and password and click login. If you are a SAML user, follow the steps below to authenticate with the client.

1	Click Login with company credentials
2	When prompted, enter your enterprise username and password and click submit
3	Enter your unique Secrata passcode and click **Login**
4	To verify successful authentication, click the Secrata menu option from the Outlook ribbon; You should see the status as 'Online'

The Secrata Outlook Ribbon Options

The Secrata ribbon allows you to view your current status, re-authenticate or launch the web client to manage your workspaces.
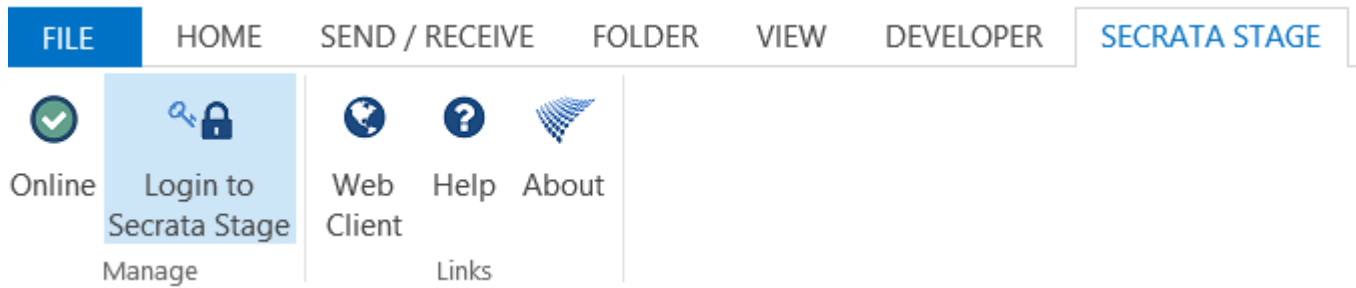
A user is either Online or the client is labeled Disabled. Once you authenticate, by default, the client will be set to Online status. To disable the Outlook application, simply click the button to change status from Online to Disabled.

If you need to authenticate with Secrata or re-authenticate with Secrata, you can do so by clicking Login to Secrata from the ribbon options.

Optionally, you can launch the Web Client to reset a passcode, view all your workspaces, or manage the workspaces.

Clicking Help will launch your web browser and direct you to the Secrata.com help page containing user guides and other information.

The About option details information on the Secrata client you have installed.
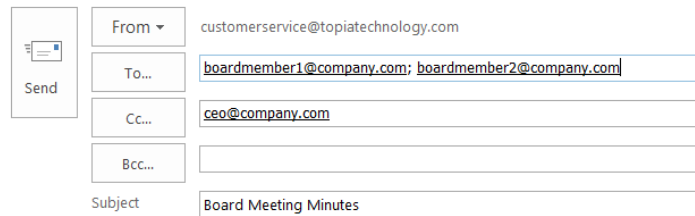
Sending an Email Using Secrata

The Secrata Outlook application streamlines the process of workspace management by smartly parsing the email. This section will cover the sending of an email and what each component of the email is accomplishing.

Secure via   Remove
Secrata Stage   Attachment ▾
Secrata Stage Actions

The green check mark indicates this email and its attachment will all be chunked and encrypted. The 1 indicates a single attachment has been added to the email and will subsequently be added to the workspace.

The Secrata Outlook client will automatically send notifications to end users who have a Secrata account that a file has been added to the workspace. Users without an account, will automatically have their account created.

Note: All users in the CC and BCC will be added to the workspace and viewable by all members.

From ▾   customerservice@topiatechnology.com

To...   boardmember1@company.com; boardmember2@company.com

Cc...   ceo@company.com

Bcc...

Subject   Board Meeting Minutes

Send

Good Morning,

Thank you all for attending our most recent board meeting.

Secrata will smartly parse the email to extract the email body and automatically add it as a message to the workspace.

Once you have added your attachment, members and message to the email, simply hit Send to create the workspace. The attachment will be uploaded to the workspace, the members will automatically be added and the message will be inserted into the workspace to create a secure and seamless end user experience.

secrata
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