


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

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 secrata.com

secrata 
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The Secrata Web App User Guide

The Secrata Web Application supports the latest versions of Chrome, Firefox and Internet Explorer. For security concerns, Safari and IE 7, 8, 9, and 10 are not officially supported by Secrata.

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 typing in your Secrata URL into your preferred browser
- 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 typing in your Secrata URL into your preferred browser
- 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 **Submit**. 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.



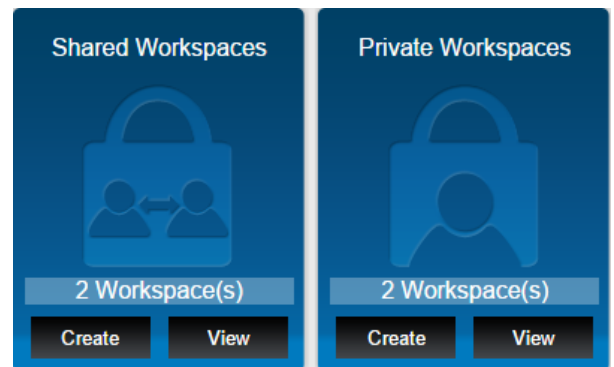
AD/LDAP User

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 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 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 Optionally invite members, add messages or attach files
- 4 **Click create**
- 5 You should be taken to the list of all your available workspaces

Add Shared Workspace

Name: _____

Description: _____

Add Member(s)

Email Addresses (comma separated): _____

User to invite: _____

Description: _____

Invitation message: _____

Add Workspace Message

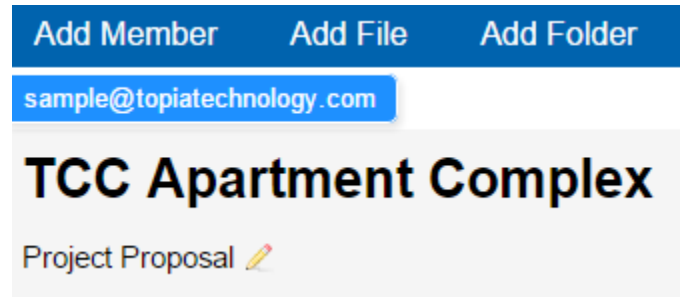
Message: _____

Attach File: _____ Browse

Create Cancel

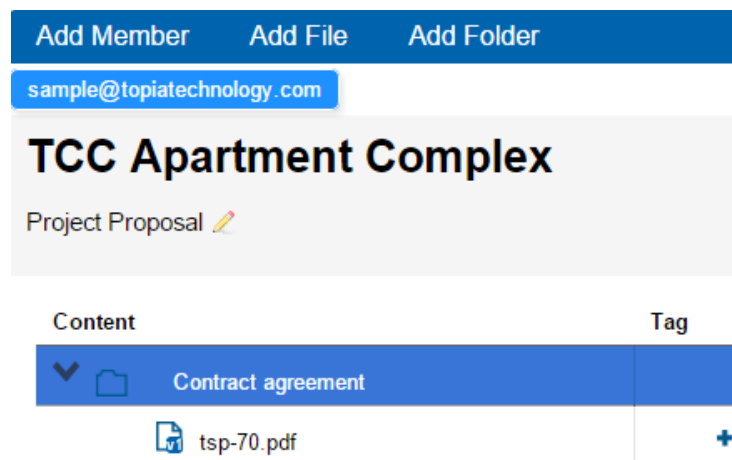
Navigating a Workspace

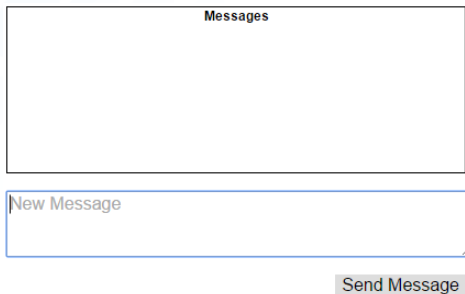
- 1 Select a workspace by **Clicking** the workspace name
- 2 From here, you can add Members, files or folders from the top row menu
- 3 To remove the workspace, click **Remove Workspace** from the top row menu
- 4 You can also add a **Message** by typing your message into the blank field and clicking **Send Message**



Setting up your Workspace

- 1 From the top row menu, click **Add Folder**
- 2 Insert the folder name and click **Add Folder**
- 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**





Messaging

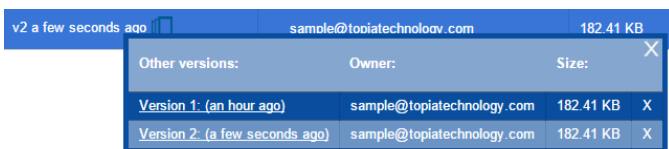
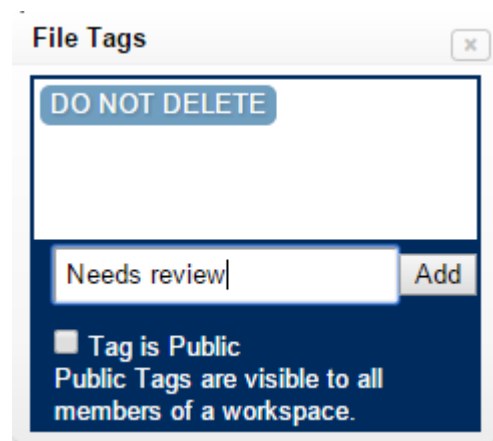
Messaging is a quick and easy way to keep your team informed of the latest details.

- 1 Click the area labeled 'New Message'
- 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 box, click the X



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**
 - 4 To invite more than one member, simply add a comma between the email address
- To remove a member, click their **Name** and select **Remove Member**

