

1. Getting Started with Secrata Web Client

Secrata is a robust product that can support many different workflows based on your organization's needs. This guide will serve as a starting point to get users quickly oriented to the concept of Secrata workspaces, and will introduce common Secrata workflows.

Secrata supports the following web browsers, for security concerns, no other browsers are officially supported by Secrata.

- Latest Version of Google Chrome
- Latest Version of Mozilla Firefox
- Latest Version of Microsoft Edge
- Internet Explorer 11

a. Secrata Navigation and Use

The Secrata service is designed as the easiest, most secure way to share your data. This section describes how users can quickly get started using Secrata in their operational workflows:

i. Logging In to Secrata

Secrata supports three methods of authentication, depending on if your enterprise is using AD/LDAP or SAML authentication, the user log in experience may change slightly.

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

SAML Login

- | | |
|---|---|
| 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 Login

- | | |
|---|--|
| 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 |

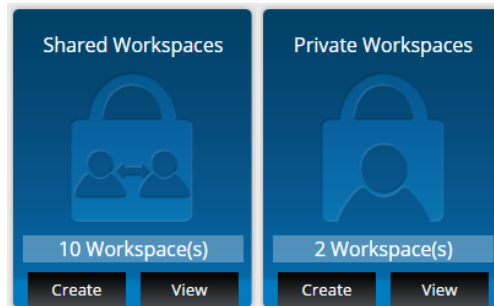
External Login

- | | |
|---|--|
| 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 enterprise password and click Login |

ii. *Secrata Workspaces*

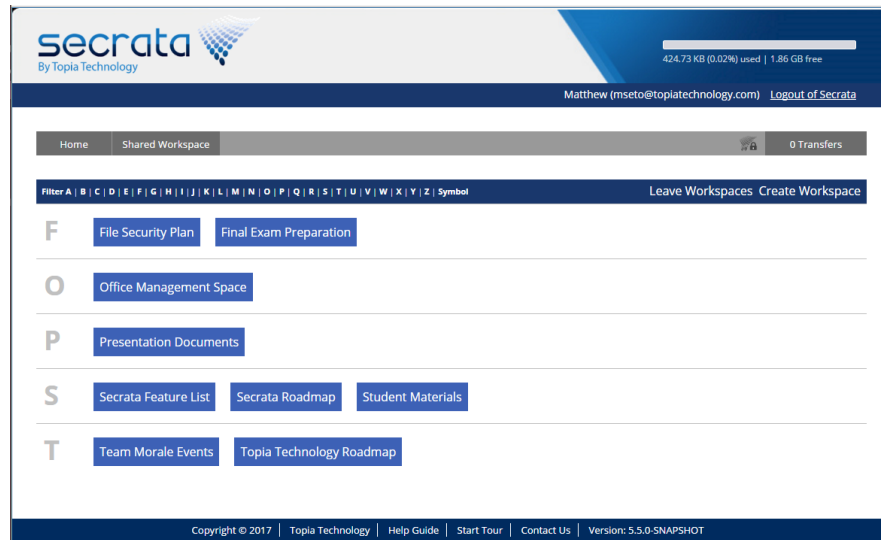
Secrata Workspaces are the core of the Secrata EFSS system. Workspaces are where users store files, invite other users to share their documents, and collaborate with their co-workers.

Secrata offers two types of workspaces, Private and Shared. Private workspaces *cannot ever* be shared with other users, and are intended for storing private files only. These workspaces are available on the Secrata homepage through this link:



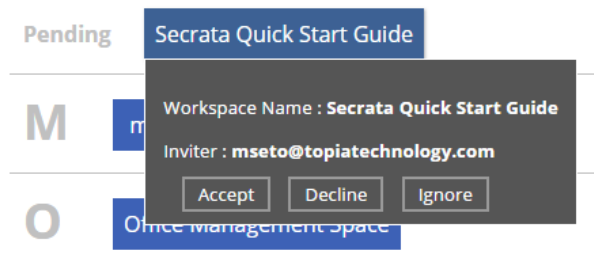
Secrata workspaces are organized alphabetically by name. Each workspace is displayed as a blue button, click the workspace to drill in and view your files.





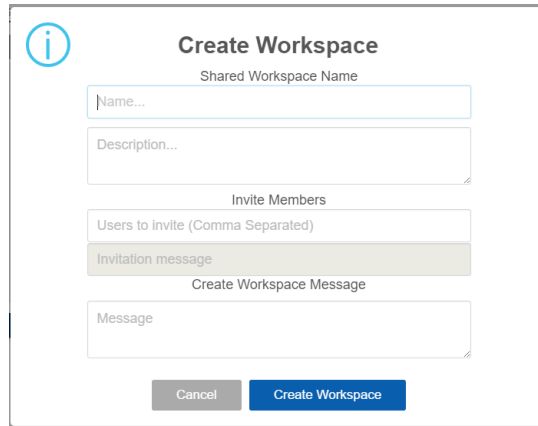
For users with many workspaces, the list can be filtered by selecting the letter you wish to view from the alphabet list above your workspaces. Clear the filter by selecting 'Clear Filter'.

If a user has invited you to share a Secrata workspace, Secrata will prompt you to accept or decline the workspace invitation. Workspace invitations will remain pending until you either accept or decline the invite. (More details in workspace invitations in section *iv: Managing Members*)



Creating Workspaces

Create a new workspace by clicking 'Create Workspace' in the upper right corner of the page. Secrata will prompt for workspace details, click 'Create Workspace' to create the new workspace. A workspace name is *required*.



The 'Create Workspace' dialog box features an information icon in the top left corner. It contains several input fields: 'Name...' for the workspace name, 'Description...' for a brief description, 'Users to invite (Comma Separated)' for adding members, 'Invitation message' for a custom message, and 'Message' for a general workspace message. At the bottom, there are 'Cancel' and 'Create Workspace' buttons.

Navigating the Workspace

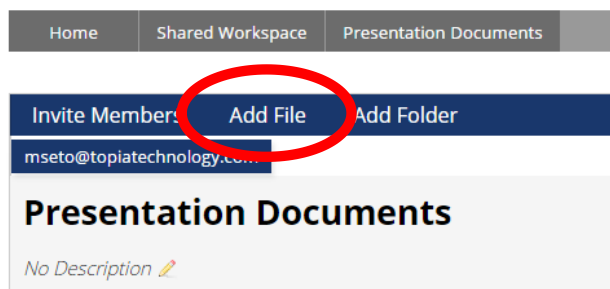
The core functionalities of a Secrata workspace are to upload/download files, organize and share the workspace with other users, and to communicate to other workspace members.

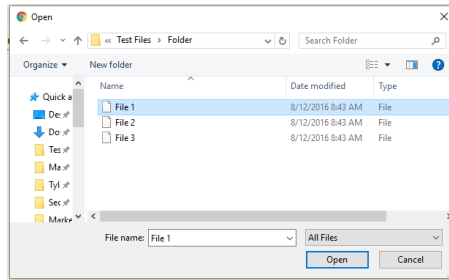
iii. Managing Files

Uploading Files

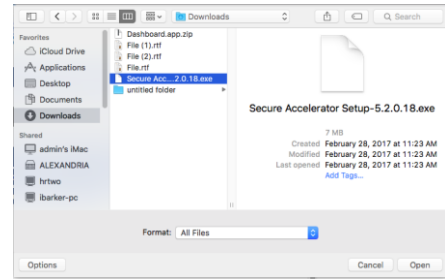
Users with a storage quota greater than zero will be able to upload files to any Secrata workspace of which they are members.

Add files to a workspace through the 'Add File' button in the tool bar. A file chooser dialog will appear where you can select the file that you wish to upload to Secrata.



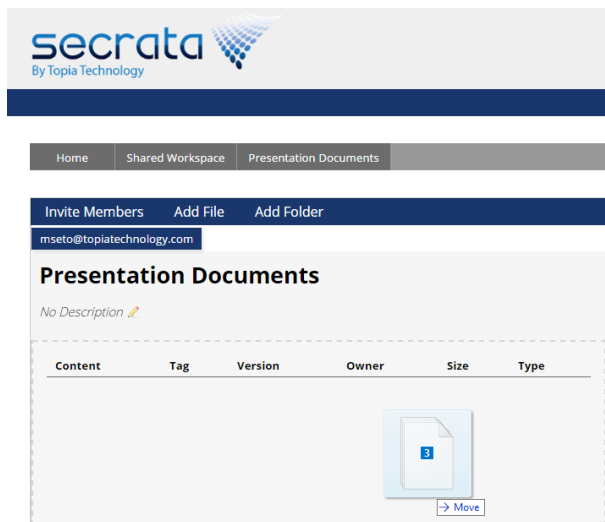


On Windows systems, select *Open* to begin uploading the file.



On Mac systems, select *Open* to begin uploading the file

Secrata also supports Drag-And-Drop file uploading. Simply drag the file or files that you wish to upload into the Secrata workspace to initiate the upload.

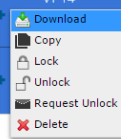


Downloading Files

Any workspace member can download any file that exists in a workspace. Viewing the files in a workspace, you can double-click any file that you wish to download. The file will immediately begin downloading.

Secrata also supports multi-select of files. You can select an entire range of files by holding the SHIFT key and selecting a range of files. Alternatively, you can press and hold the CTRL button and select all of the files you wish to download. Selected files are highlighted in blue.

Content	Tag	Version	Owner	Size	Type
Demo Doc.docx	+	v1.14 minutes ago	mseto@topiatechnology.com	11.1 KB	Document
viFile 1	+	v1.14	mseto@topiatechnology.com	230 Bytes	Application
vtext.txt	+		mseto@topiatechnology.com	8 Bytes	text/plain



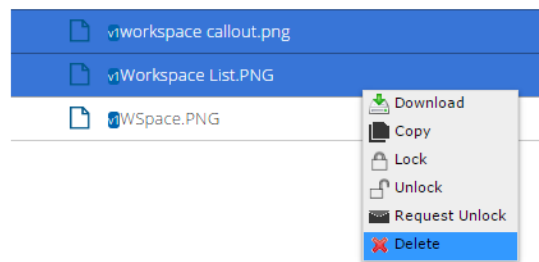
Right-click on the highlighted files and select *Download*. Your selected files will begin to download immediately.

Deleting Files

Any user with permissions to delete files can delete files from any workspace of which they are a member.

To delete a file, select the file or files that you wish to delete. Once your file is highlighted in blue, click *Delete Selected* in the workspace tool bar. You will be prompted to confirm you wish to delete files.

Deleting a file is also supported in the right-click menu. Select the file or files you wish to delete, right click and select Delete. You will be prompted to confirm deletion.



Multi-select of files is supported as described in the previous section outlining 'Downloading Files'.

iv. Managing Members

One of the most powerful features of Secrata is its ability to securely share files with colleagues inside and outside of your IT network. This is accomplished by adding and removing members from your shared Secrata workspaces.

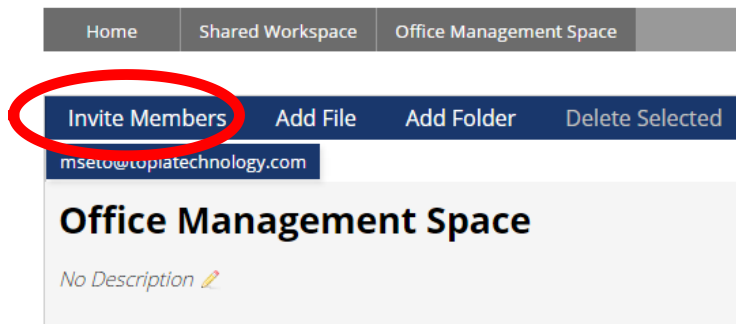


Any user with permissions to add/remove members from a workspace can add or remove members from any workspace of which they are a member.

Note: Private Secrata Workspaces can never be shared with any other users.

Adding Members to a Shared Workspace

To add a member to a shared workspace, simply click the *Invite Members* button in the Workspace tool bar. You can invite any user with a valid email address to share the workspace.



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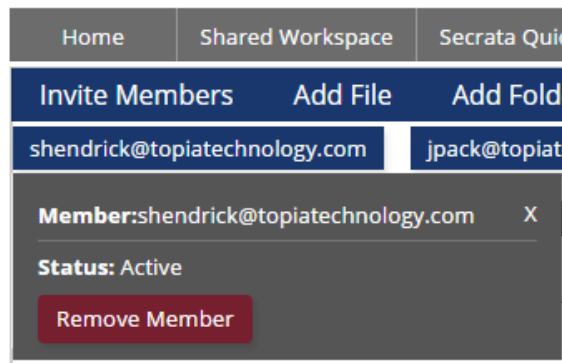
Enter any email address into the *Users to Invite* field. Invite multiple users by comma separating email addresses. You can enter as many email addresses as you like.

A screenshot of the 'Invite Member' dialog box. It features a blue information icon in the top left corner. The title 'Invite Member' is centered at the top. Below the title, there is a text input field labeled 'Users to Invite (Comma Separated)'. Underneath this is another text input field labeled 'Invitation message'. At the bottom of the dialog, there are two buttons: a grey 'Cancel' button and a blue 'Invite Member' button.

If a user is already a Secrata user, they will receive an email inviting them to share your workspace. If a user is not already a Secrata user, they will receive an email outlining how they can get started using Secrata to view your shared workspaces.

Removing Members from a Shared Workspace

To remove a member from a workspace, find the user in the members list of the workspace. Click their name and select '*Remove Member*'. You will be prompted to confirm you wish to remove the member from the workspace.



If you inadvertently remove a member from a workspace, or if you require a member to re-join a workspace you can invite them back using the *Invite Members* tool.

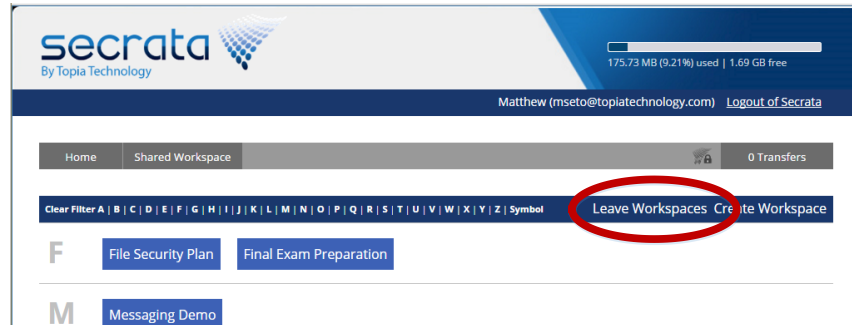
Leaving a Workspace

Users who never need a workspace's files or messages again may choose to leave that workspace. Once you leave a workspace *you will lose all access to that workspace, its files, and its messages.*

Any remaining workspace members may invite you back to the workspace if they so desire.

Once the last member has left a workspace, that workspace is deleted forever.





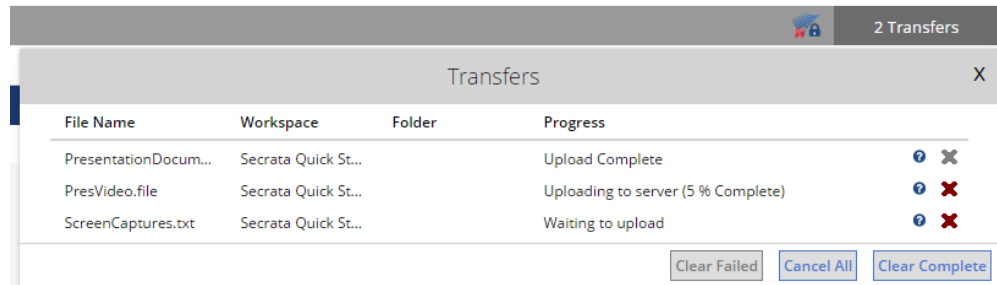
Leaving a workspace can be done from the Workspaces list, click 'Leave Workspaces' and then select the workspaces you wish to leave. You will be prompted to confirm that you are finished with those workspaces.

b. Secrata Features

Secrata has multiple features that help you to collaborate and ease your business workflows. The following will describe these features and how to use them.

i. Transfer Queue

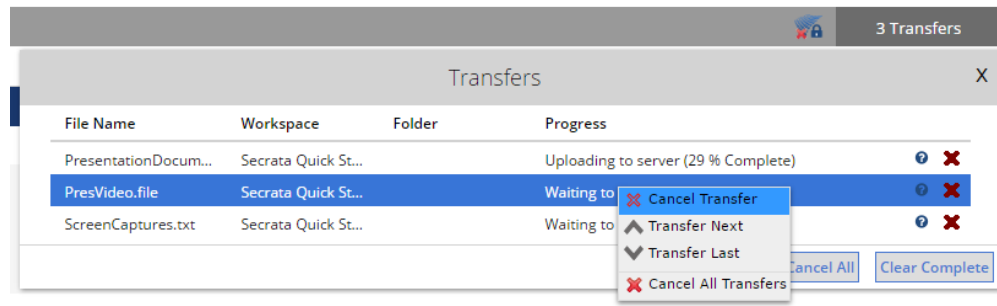
The Secrata Web Client has a Transfer Queue which displays current uploads, downloads, or other transfer information. The Transfer Queue will automatically display whenever you initiate a download or upload.



You can dismiss the Transfer Queue by clicking the **X** in the upper right corner of the Transfer Queue.

The Transfer Queue allows you to perform some actions on your transfers. Clicking the red X will cancel pending transfers, and remove completed transfers. Clicking the question mark will provide more details about that transfer and its status.

The Transfer Queue allows you to right-click any transfer to perform certain actions. Simply right-click on a transfer and select from the available options



Transfer Next - Selecting Transfer Next will cause the selected transfer to begin immediately following the completion of the current transfer. The selected transfer will move up in the transfer list. This feature is used if you wish to complete a transfer as soon as possible. All other transfers will complete in order.

Transfer Last – Selecting Transfer Last will cause the selected transfer to move to the bottom of the transfer list. This transfer will be the last to complete.

Cancel Transfer – This will cancel the transfer

Cancel All Transfers – All transfers that are not yet completed or are in progress will be cancelled.

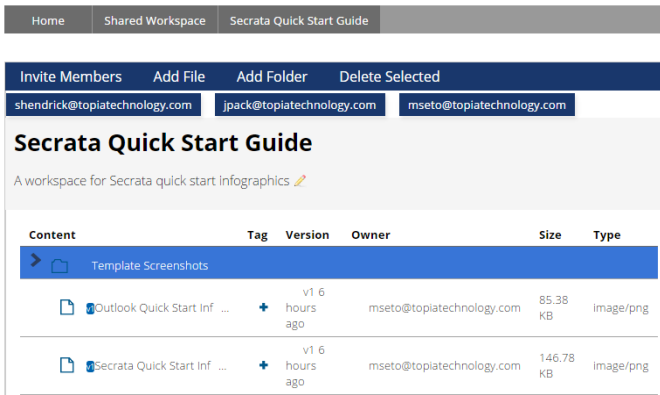
Remove Transfer – This will remove a completed or failed transfer from the transfer queue.

Remove Completed Transfers – This will remove all completed transfers from the transfer queue. Any in progress, pending, or failed transfers will remain in the Transfer Queue.

ii. *Workspace Folders*

Secrata workspaces support folders to help you organize your files and documents. To create a workspace folder click the 'Add Folder' button in the workspace tool bar. Your folder requires a name.

To add files to a folder, you must select the folder to which you wish to add files. Select a folder by clicking it so that it is highlighted in blue.



Once the destination folder is selected, you can add files by clicking 'Add File'. Note, you can also click 'Add Folder' to create a subfolder.

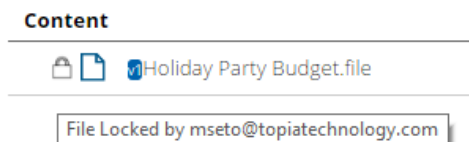
Drag and Drop is supported for dragging files directly onto the destination folder. Drag a file or files to the desired folder, once the folder shows the hashed drag-and-drop border, drop the files and they will be uploaded to that destination.

iii. File locking

Secrata supports simple collaboration workflows by allowing you to lock files within a workspace. This mechanism prevents accidental deletions, overwrites, or modifications to files.




To lock a file, right click on the file or files that you wish to lock, right click and select 'Lock' from the context menu. An icon will appear beside the file indicating that you have locked that file.

To unlock a file, simply right click the file and select 'Unlock'.



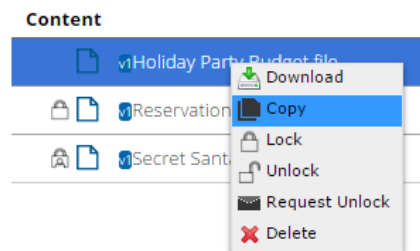
If another user has locked a file, the lock icon will be slightly different. You can find out who locked the file by hovering your mouse over the lock icon. You cannot unlock a file that has been locked by someone else. You may right click the file and select 'Request Unlock'. This will trigger a workspace message asking the user to unlock the file. (Further details on Workspace messages in Section 2.b.vi)

File Locking Icons

	Indicates that the file is locked and that you are the lock-owner
	Indicates that the file is locked by another user
	Indicates that a file is unlocked (only visible on mobile clients)

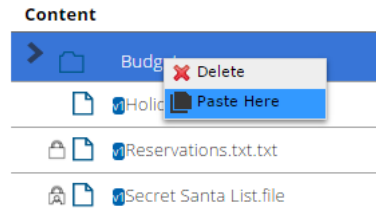
iv. Copy/Paste

Secrata supports the ability to copy and paste files to different locations around your Secrata interface.



To copy a file, right click on the file or files that you wish to copy, and select 'Copy'. The file(s) will be stored on the clipboard until you select a location to paste them.




After you have a file copied to the clipboard, you can navigate to a new location to paste it. To paste the file, right-click the desired paste location and select 'Paste Here'.



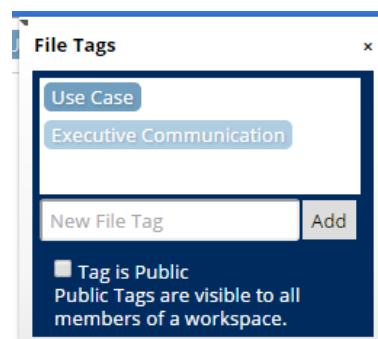
Files can be copied between folders in a workspace, or to other workspaces. You may not paste a file to a location where a file of the same name already exists.

v. File Tags

Secrata allows you to tag files with public or private tags to help you keep your workspaces organized.

Content	Tag	
 secrata 2016-ppt (with breach info).pptx	Secrata Presentation	+
 Secrata Contract Collaboration.pdf	Use Case	+
 Secrata Executive Communication.pdf	Use Case	+

To tag a file, click the + tag button beside the file you wish to tag. Enter your tag text and determine if you wish the tag to be publically visible to all workspace members or not. Tags default to be only visible by you. Remove tags by clicking them in the tag list.



vi. *Workspace Messages*

Shared Secrata workspaces have a built-in Secrata Workspace Message Board. All members of a Secrata workspace can post messages to the message board.

Messages	
mseto@topiatechnology.com	3/6/2017, 11:47:52 AM
Reviewed! I made some minor changes to the introduction and the executive summary, otherwise I think we are ready to move forward!	
sgray@topiatechnology.com	3/6/2017, 11:45:55 AM
I have uploaded the latest Requirements Spec and await your review	
jpack@topiatechnology.com	3/6/2017, 11:45:01 AM
Use this workspace for Project Apple documentation	
New Message ➤	

The messages will exist for the lifetime of the workspace, and any new users to the workspace can read the entire history of the message board. Messages are displayed with the newest post at the top.

Messages may not be deleted from the workspace message board.



The screenshot shows the Secrata Workspaces interface. At the top, there's a header with the Secrata logo and a storage status bar indicating 3.44 GB (34.44%) used and 6.56 GB free. Below the header is a navigation bar with links like Home, Workspace, and Secrata Quick Start Guide. A secondary bar contains action buttons: Invite Members, Add File, Add Folder, Delete Selected, and Leave Workspace. Below this is a members list showing email addresses. The main content area is titled 'Secrata Quick Start Guide' and contains a table of files. A messages sidebar on the right shows a message from mseto@topiatechnology.com. Numbered callouts (1-7) point to specific UI elements: 1 points to the navigation bar, 2 to the 'Add File' button, 3 to the 'Invite Members' button, 4 to the file table, 5 to the messages sidebar, 6 to the 'Leave Workspace' button, and 7 to the user profile/logout area.

Content	Tag	Version	Owner	Size	Type
Template Screenshots					
Outlook Quick Start Infograph ...	+	v1 2 minutes ago	mseto@topiatechnology.com	85.38 KB	image/png
Secrata Quick Start Infographi ...	+	v1 2 minutes ago	mseto@topiatechnology.com	146.78 KB	image/png
Workspace Quick Start Infogra ...	+	v1 2 minutes ago	mseto@topiatechnology.com	92.26 KB	image/png

1
Navigate back to your shared Workspaces using these navigation buttons

2
Add files by clicking the 'Add File' button. Create folders by clicking 'Add Folder' button.

Delete any selected files or folders by clicking 'Delete Selected'

3
Invite members by clicking 'Invite Members' and entering their email address.

Members who have accepted the invitation are displayed in blue

4
Files and folders are displayed here, double-click a file to download it, or right click to select other file actions

5
The Workspace Message board allows you to message all members in the workspace. New members can see the entire message history

6
Clicking 'Leave Workspace' will remove you from the workspace members list

7
Log out of Secrata