

## STASH DRM Installation and Usage

### Pre-Requisites

- Windows 10
- A STASH Vault account
- An API ID and API PW, available from within your Vault – see configuration below.

### Before you Begin:

If your company is utilizing the Stash DRM file protection service, please make sure to install the Seclore desktop application. This application is required to open and edit files that have been protected by Stash, but is not required to run the Stash sync client. Installation instructions for the Seclore agent can be found [here](#).

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### Installation:

- Download the SyncClient from the STASH Help Center at <https://www.stashbusiness.com/helpcenter/users>
- Double-click the setup file
- Click “Install” and “Yes” if prompted by User Account Control to make changes.
- Follow the prompts to install SyncClient. You may change the destination directory when prompted, but is not necessary.
- When installation is complete, check the box to “Start STASH SyncClient Now” and click “Finish”

### First Time Setup:

After first installing the application you will be required to submit your account information in order to connect the sync client to your vault. Please follow these steps to ensure all of the necessary information is entered correctly.

### Important:

If you have not already, please log into your Stash Portal Website (provided by your company administrator) and activate your account. If your account is not activated, you cannot properly install the Stash desktop client.

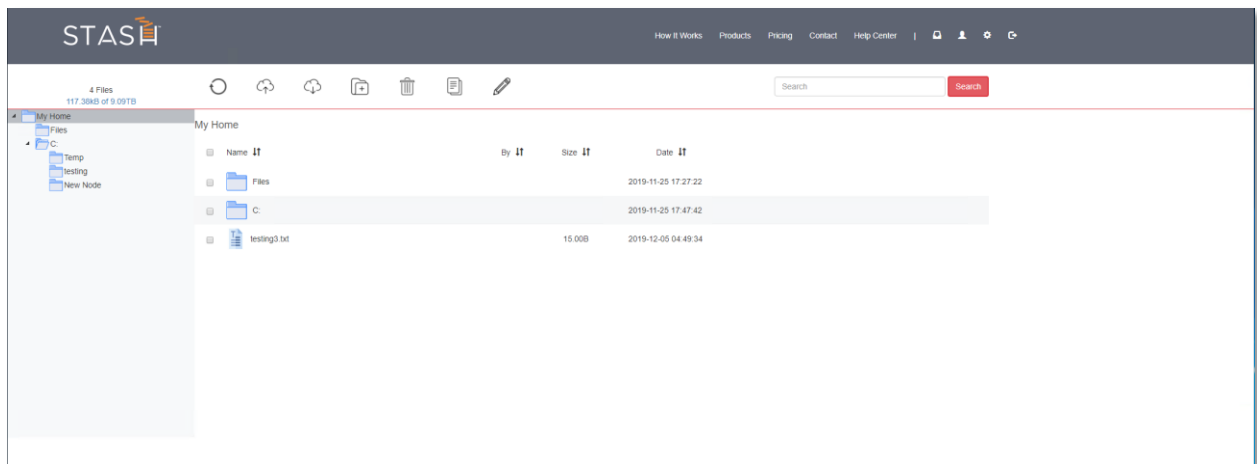
## Setup for Stash User Accounts:

The following setup instructions apply to companies whose users are created and managed by Stash. If your company is implementing its own identity access management system (E.G Active Directory) then skip to the next section.

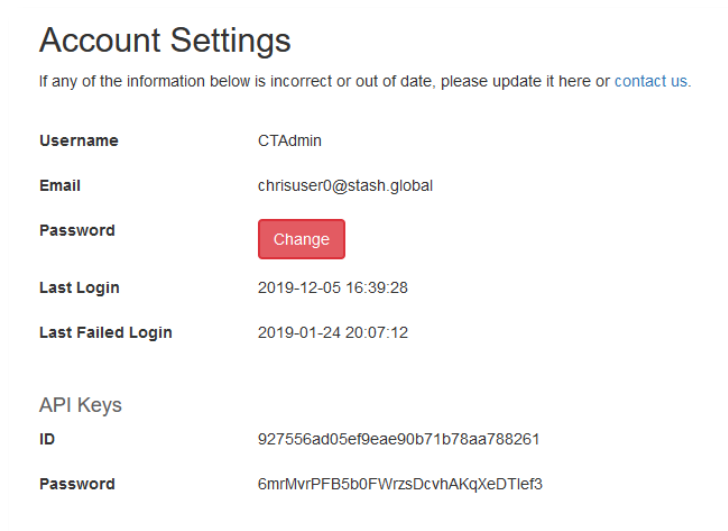
## Retrieve API Credentials

Before you can begin sync client setup, you must first retrieve your API credentials from your account portal.

- Log into your account via your Stash portal website.
- After logging in, click on the account settings icon in the top right corner of the screen.

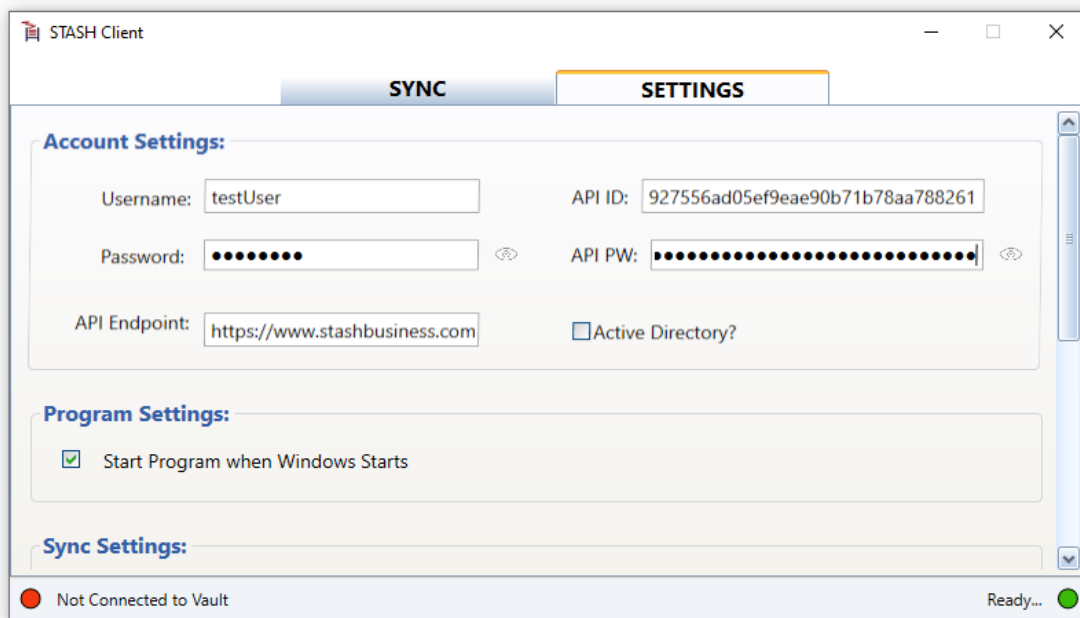


Log into your vault and select the account settings icon in the top right corner of the screen.



Copy the API ID and Password to be entered into the sync client settings.

- If you do not have API ID or Password, click the “Get Keys” button next to API Keys to have a new set generated. If you do not see the “Get Keys” button, have your administrator generate your keys for you.
- After finding your API information, return to the Stash desktop client and click on the “Settings” tab at the top of the application window.
- Enter your Stash username and password into the username and password field.
- Enter the API ID and Password you retrieved from your account settings page into the API ID and API PW fields.
- If you are using the SaaS instance of STASH, enter <https://www.stashbusiness.com> into the API Endpoint field.
- If you are using a dedicated STASH instance, enter the URL provided by your administrator.



Example of populated account settings

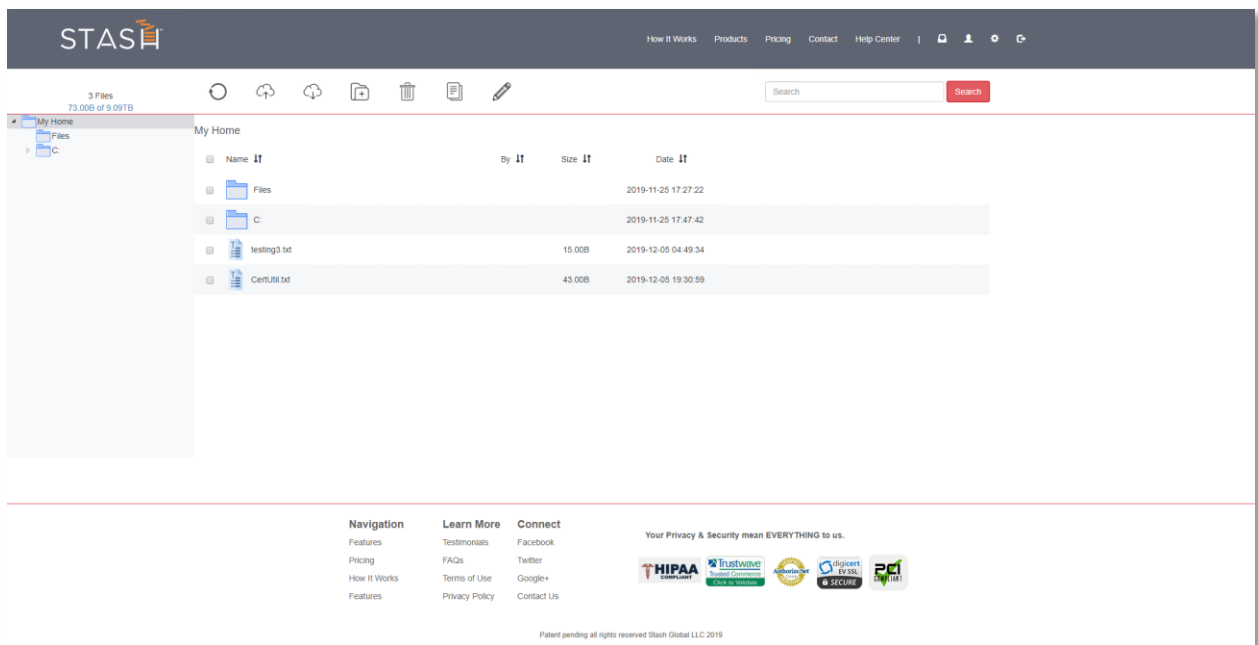
## Setup for Integrated Identity Access Management

The following instructions apply to user accounts that are managed outside of Stash. If you are logging in with active directory credentials, please follow the instructions below.

### Retrieve API Credentials

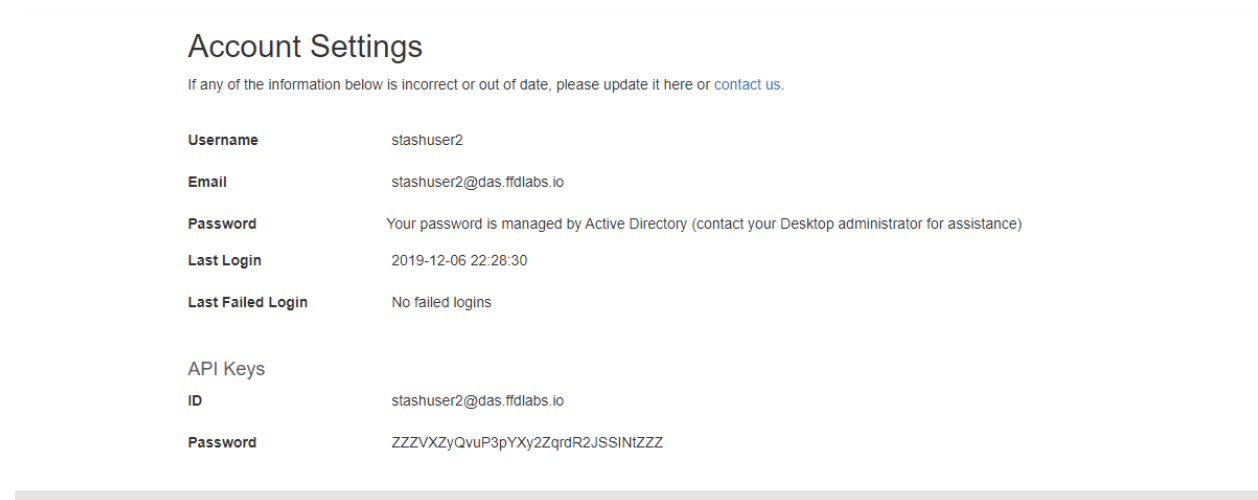
Before you can begin sync client setup, you must first retrieve your API password from your account portal.

- Log into your account via your Stash portal website.
- After logging in, click on the account settings icon in the top right corner of the screen.



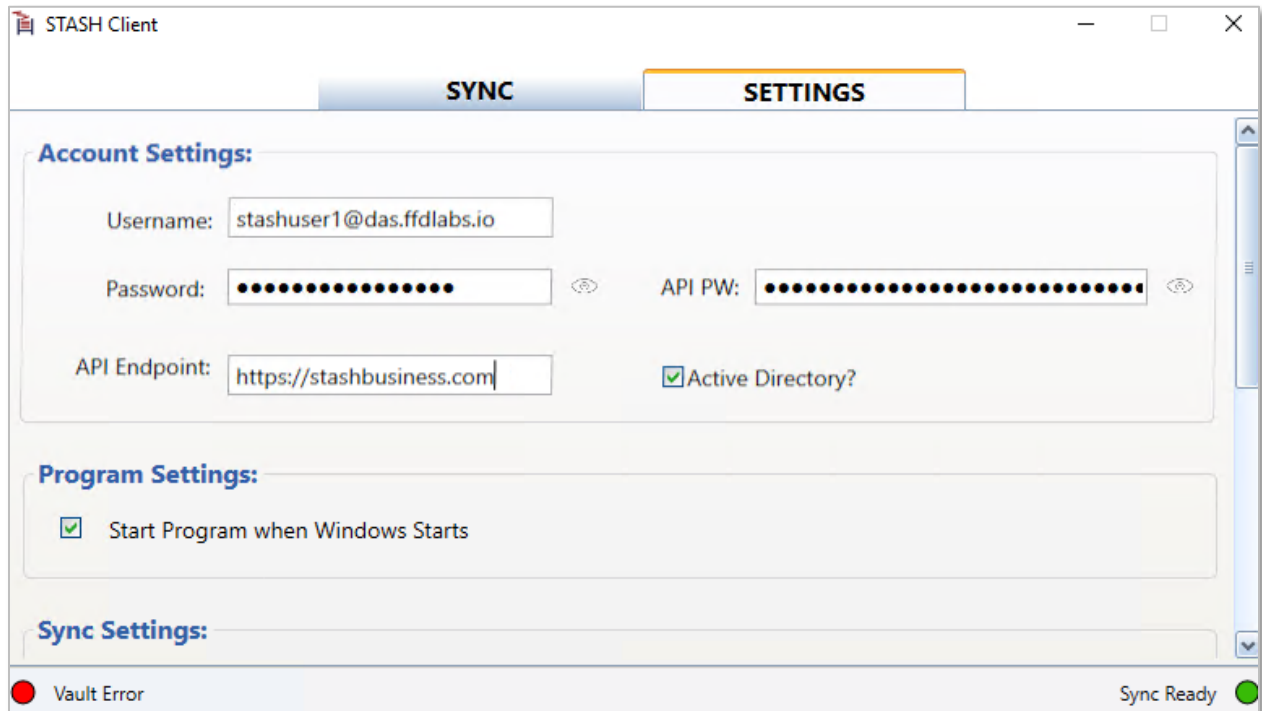
- For active directory users, you will only need to retrieve an API password from the vault.

Log into your vault and select the account settings icon in the top right corner of the screen.



Copy the API Password to be entered into the sync client settings.

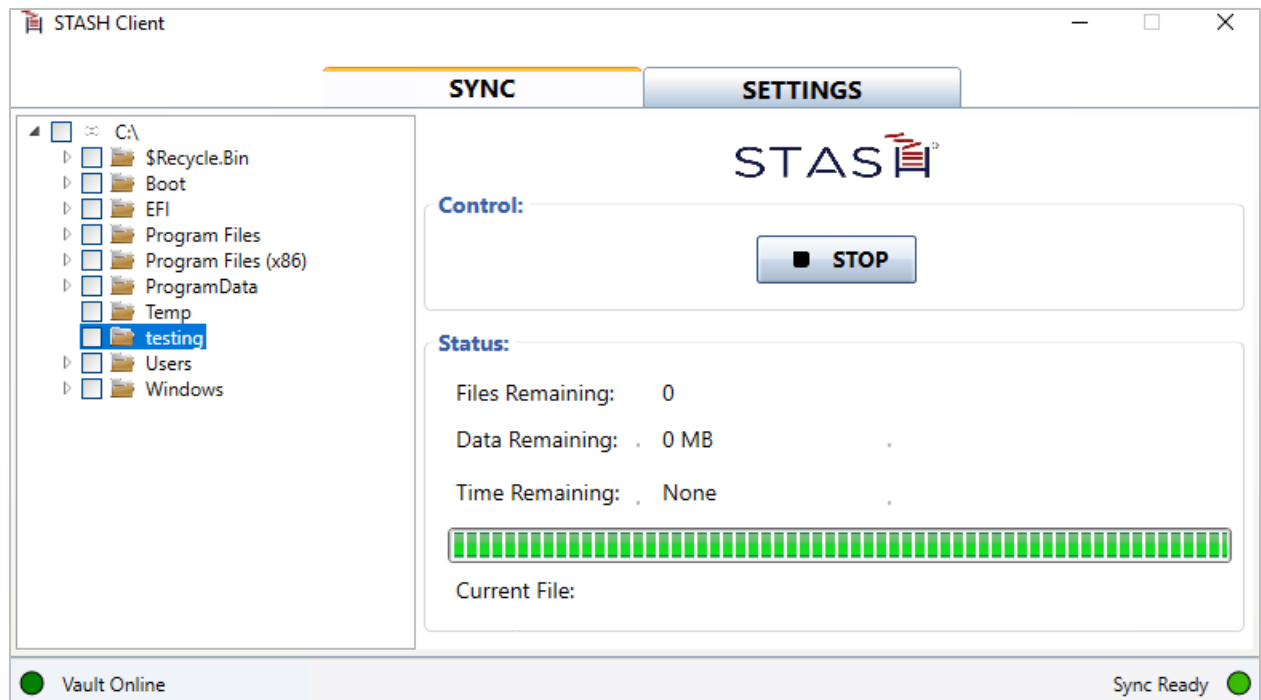
- After finding your API information, return to the Stash desktop client.
- Click on the “Settings” tab at the top of the application window.
- Make sure to check the “Active Directory” checkbox in the settings screen.
- Enter your Stash username and password into the username and password field.
- Enter the API password you retrieved from your account settings page into the API PW field.
- If you are using the SaaS instance of STASH, enter <https://www.stashbusiness.com> into the API Endpoint field.



- If you are using a dedicated STASH instance, enter the URL provided by your administrator.
- We recommend checking the box “Start Program when Windows Starts” to allow the SyncClient to run all the time even if you restart your computer.
- Scroll to the bottom of the window and click “Save”. The SyncClient will verify your information and prompt you for changes if the information was entered incorrectly.

## Using the Stash Desktop Client

After your API and login information has been validated, your application will automatically sync with your vault. This can be verified by the green icons on the bottom left and right corners of the screen. If your application is not connected to the vault, please complete the previous steps and save your login information.



Green buttons on the bottom left and right sides of the screen indicate that the vault is syncing properly.

### Monitored Locations

Monitored locations are folders on your file system that will be monitored by Stash. When a folder on your computer is added as a monitored location, the folder and its contents are automatically uploaded to your vault. Any new files that you add to this folder either via the sync client on your computer or via the Stash web portal will be copied to the vault. All instances of the Stash application that are configured to connect to your vault will be updated to reflect these changes.

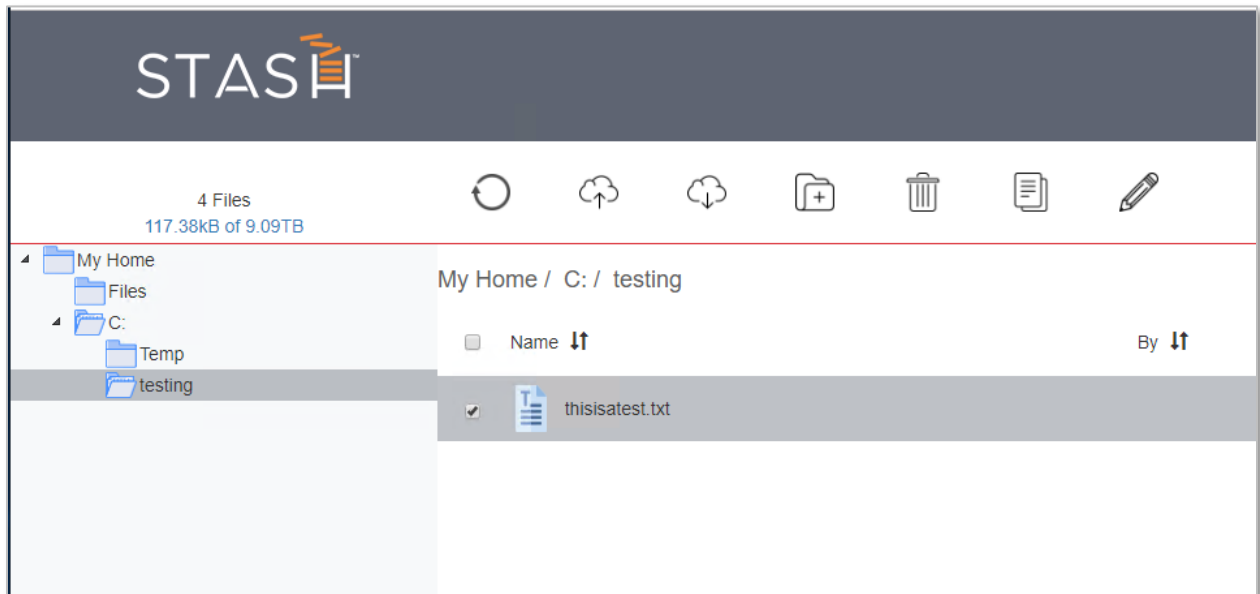
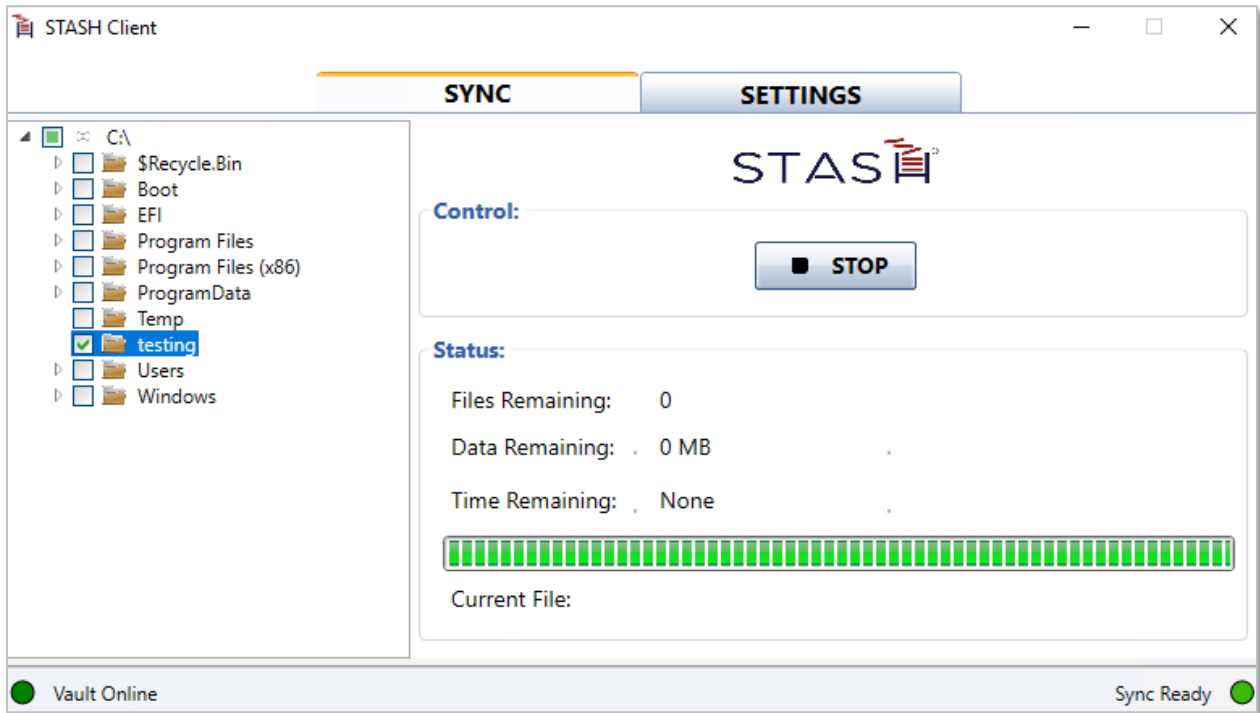
Any changes, including deleting, renaming, or updating files, will be reflected in the Vault and any other computers running the SyncClient as well.

### Selecting and Utilizing a Monitored Location

- To select a folder to be monitored, navigate to the “Sync” window and locate the folder in the folder tree. You may select multiple folders if you wish to monitor multiple locations.
- Once all desired folders have been selected, click on the “Start” button to begin syncing them to your vault. The sync client will inventory any files in the selected directory and synchronize them automatically with your vault and with other computers running SyncClient.



- The status display, including files remaining, data remaining, and time remaining will update based on the number of files in the directories you've selected and show a progress bar until all files and directories have been synchronized.



Files uploaded through the sync client will become available under an identical folder in your online vault.

### To Stop Syncing A Monitored Location

- Expand the directory trees in the “Sync” window to find the directory you want to stop synchronizing.
- Uncheck the box next to each location that you would like to stop monitoring.
- Once the folder is unchecked, the sync client will stop monitoring it. This means that any changes to the folder or its contents will no longer be synced to the stash vault or any other instances of the Stash desktop application.

**Note**, when you uncheck a directory, only this copy of the SyncClient will stop updating files. Any other SyncClient locations and the Vault will continue to stay synchronized. **No files are deleted if you uncheck a directory.**

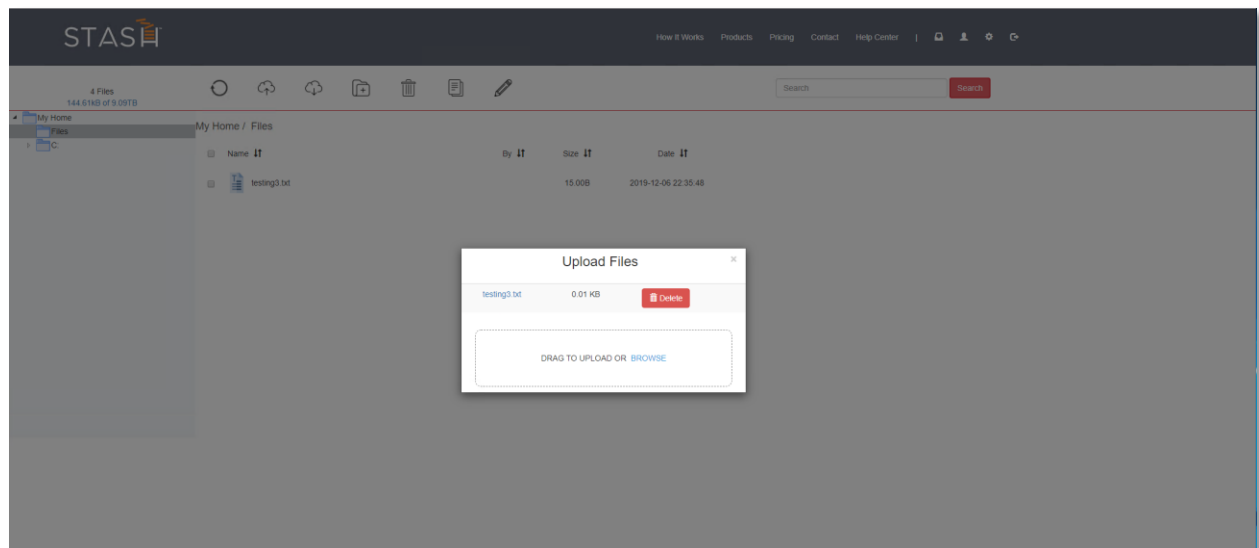
### To Copy a File to A Monitored Location via the Desktop Client

To copy a file into your vault, simply place that file into a monitored location via the Windows File Explorer. The file will be automatically synced to your online vault as well as all other instances of the Stash desktop client that are connected to your vault.

### To Copy a File to A Monitored Location via the Online Interface

All monitored locations will be available in your vault. If you would like to add a file to a monitored location.

- Log into your online vault
- Select the folder you would like to upload the file into
- Select “upload”. This will prompt a Windows Explorer window to appear.
- Select your file and select “Open”. The file will be automatically added to your vault and copied across all instances of the Stash desktop client that are connected to your vault.

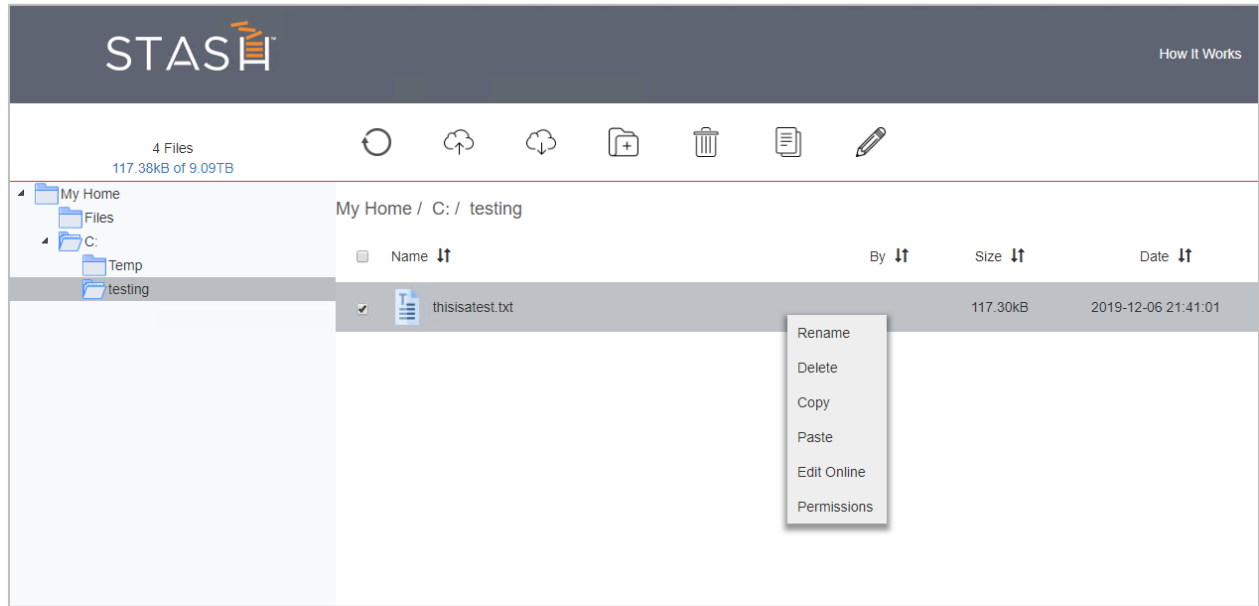


Select the folder you would like to add the file and click the upload icon in the upper menu bar.

### To Delete a File or Folder from A Monitored Location

- Open the directory where the file is located through Explorer.
- Select the file and delete it.

- SyncClient will detect that the file has been deleted, and automatically remove it from your Vault and other SyncClient locations
  - The same steps can be followed to delete a folder.
- OR-
- Login to the Vault web interface, select the file, and delete it. SyncClient will remove it from all SyncClient locations.



To delete a file or folder via the online vault interface, right click and select “delete”.

### To Retrieve A File from Your Online Vault

Files stored in your vault can be retrieved either via the web interface or desktop client. To retrieve a file from your vault via the online vault, select the file you would like to download and click the “Download” option in the upper menu bar.

### To Retrieve A File from Your Desktop Client

You may remove files from monitored locations at any time. Files that are removed from a monitored location will no longer be synced with the vault unless they are placed into another monitored location. In this case, the file will be uploaded to the new location and monitored normally.

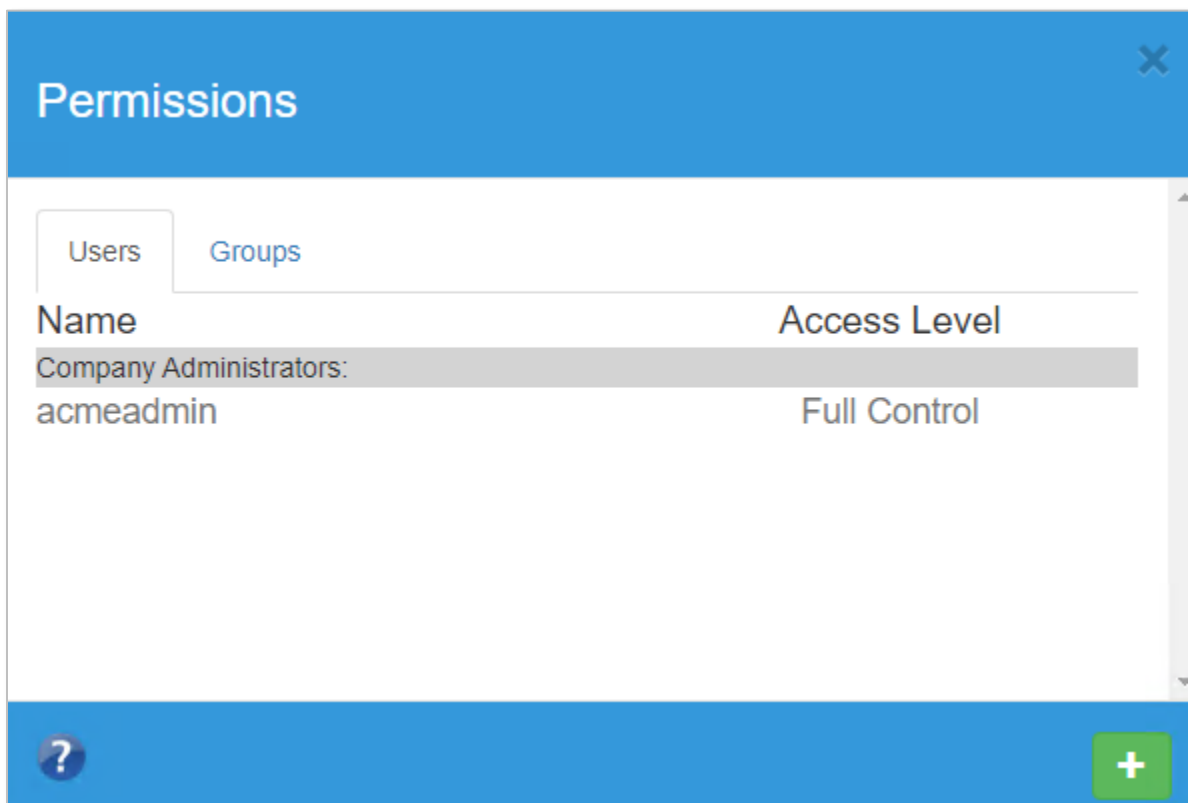
If you would like to remove a file or folder directly from the vault, simply locate the file within Windows File Explorer and copy or drag-and-drop the file out of the monitored location.

## Permissions

The Stash online vault interface allows users to adjust permissions to either allow or restrict levels of access on files and folders. Files will inherit permissions that are set on their parent folders. If a user is set to have “No Access” to a file, then that user will not see the file in any instance of their vault.

To adjust permissions on a monitored location, please follow these steps:

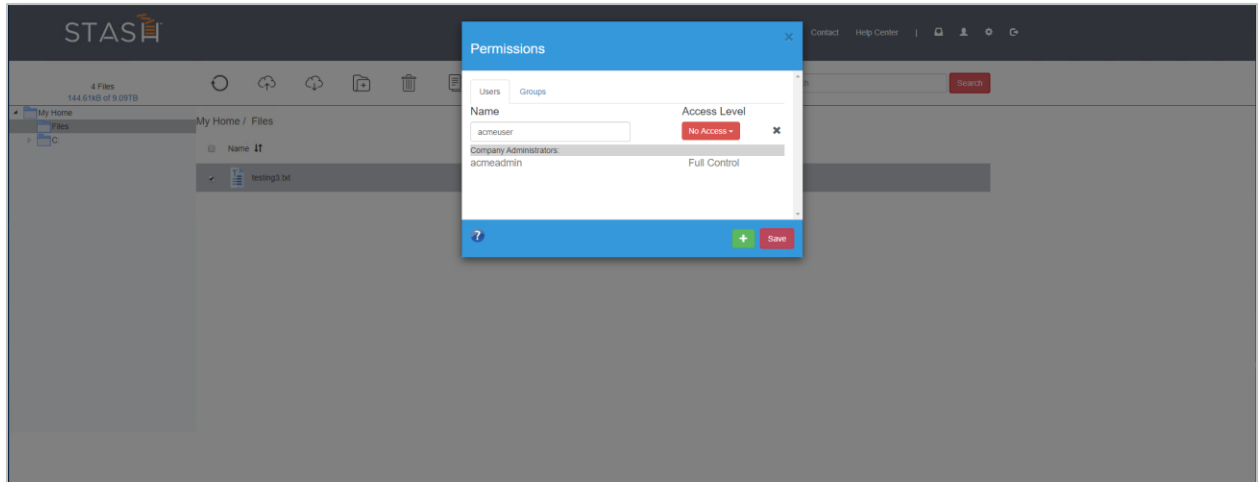
- Log into your online Stash vault in your preferred web browser.
- Locate the file that you would like to adjust by navigating the folder tree on the left side of the window.
- Right click on the desired folder and select “permissions”. This will prompt a new permissions window to open displaying the current permissions on this folder.



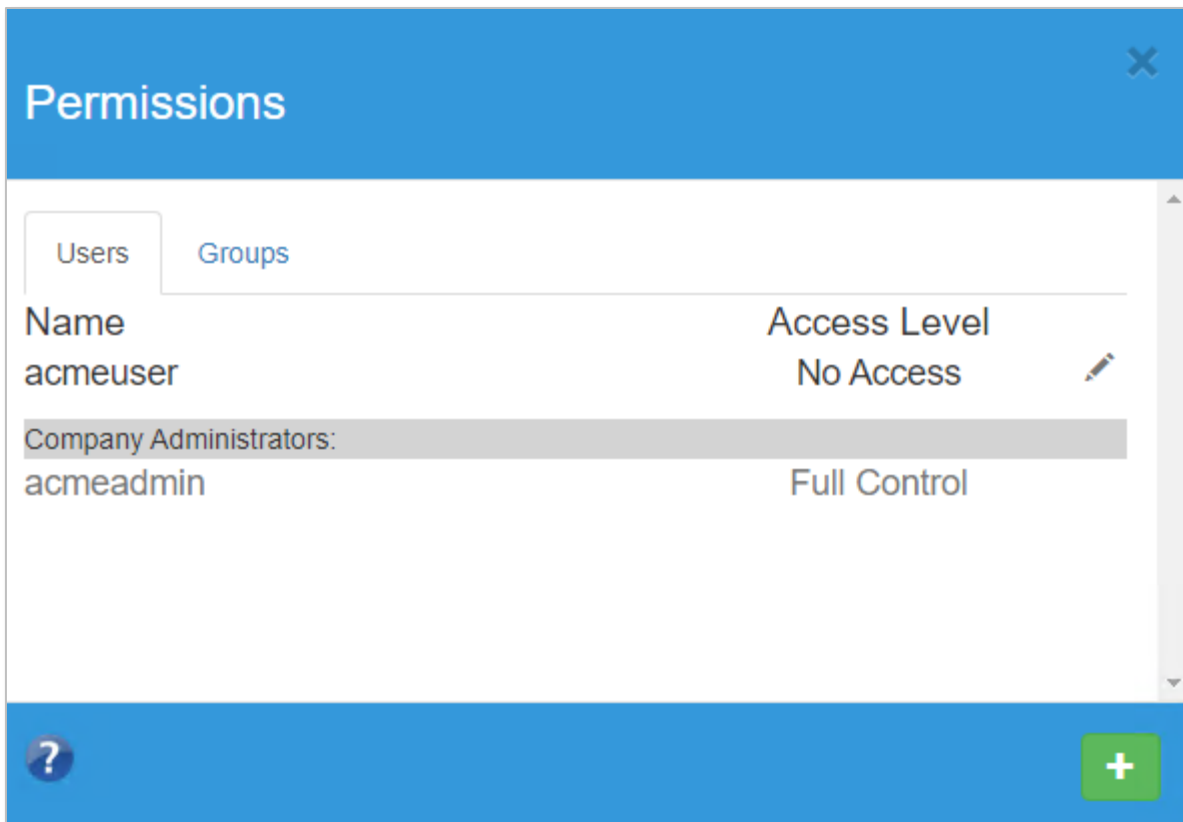
The permissions window show which administrators are given full control by default

- Once the permission window has been opened, click the + icon to add a new entry.
- Enter the username of the user that you would like to adjust permissions for in the username field.
- Select the permission level from the dropdown. The options are as follows:
  - **Read:** The user can view files and folders within this directory.
  - **Write:** The user can view, edit, update, and delete files and folders in this directory.

- **Full Control:** The user has all rights described above as well as the ability to edit permissions.
  - **No Access:** The user has no access to the folders contents. The folder will not be shown in their vault.
- After selecting the proper permission level, click the “Save” button at the bottom of the window and confirm that you would like to adjust the permissions.
  - You may edit the folders permissions at any time by opening the permission window, clicking the pencil icon, and changing the permission level.



Setting the permission level on a folder



After permissions have been saved, you can edit them by opening the permission dialogue and clicking the pencil icon.

### Utilizing DRM Protection Functionality

The following section applies only to those accounts that are configured to use Seclore Data Rights Management as their primary method of file encryption.

Seclore DRM allows users to set and adjust permissions on files in their vault. The permissions set on these files will be enforced even after files have left the vault, meaning the data within protected documents will only be available to users who have been explicitly given access via the online Stash portal, no matter where that document goes. To view how to adjust permissions, please read the section of this guide titled Permissions.

### Installing the File Secure Desktop Client

- Download the Seclore desktop client at [http://product.seclere.com/updates/Download.download?dp\\_comp=1&dp\\_tab=0](http://product.seclere.com/updates/Download.download?dp_comp=1&dp_tab=0)
- Double-click the setup file
- Click "Install" and "Yes" if prompted by User Account Control to make changes.
- Enter the full URL of your Seclore policy server as well as your Seclore login credentials.
- Enter any proxy server information, if necessary.
- When the wizard closes, restart your computer to complete installation.

## Using the File Secure Desktop Client

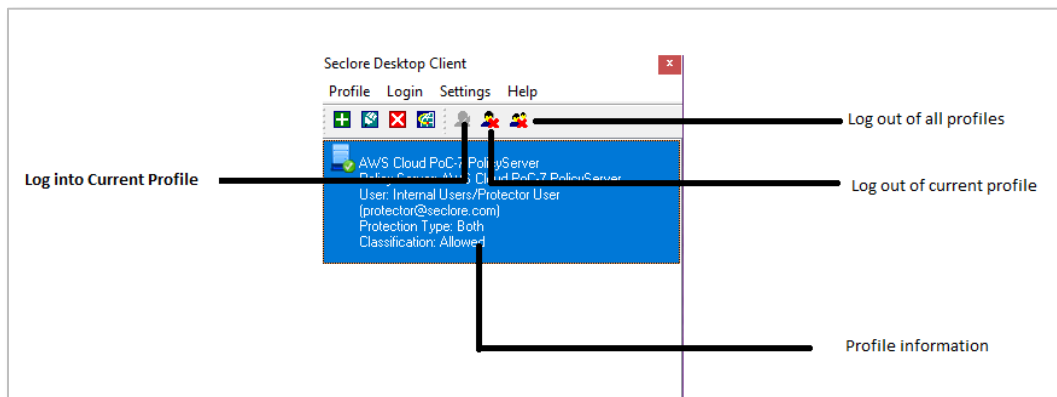
The File Secure desktop client will track all Seclore DRM protected files on your computer and perform permission checks on those files when they are opened. This application must be installed in order to view or edit documents that have been protected by Stash.

The credentials entered by the user during installation will be validated, saved, and used as the primary login credentials for the application which will run automatically at startup, allowing users to view DRM protected files immediately after they sign in.

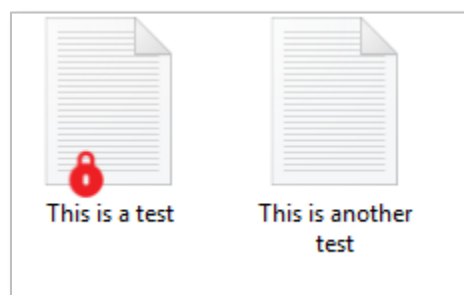
## Changing Accounts

To log out of an existing Seclore account and into another one select your profile from the main screen and click on the “Log out of profile” button in the upper navigation bar.

Once you've logged out, you may select the “Login to selected profile” button to log into another account that is configured to connect to the same policy server. This will prompt a login window to appear, at which point you may enter your credentials.



## Viewing Protected Files



Items protected by Seclore DRM will display a red padlock.

Files protected by Seclore DRM will look the same as any other document. The Seclore desktop application will notify users of protected files by displaying a small red lock icon over the file's thumbnail.

To View a DRM protected document, double click on the file's icon and the Seclore desktop application will automatically check permissions and open the file if your permissions suffice. If you do not have permissions to open a file, please ask the document owner or a vault administrator to adjust your permissions.