

## STASH Administration Functions

### Overview:

This article describes how to use the administrative features in your custom STASH portal.

*Note: These functions are only available to STASH business customers with administrative privileges.*

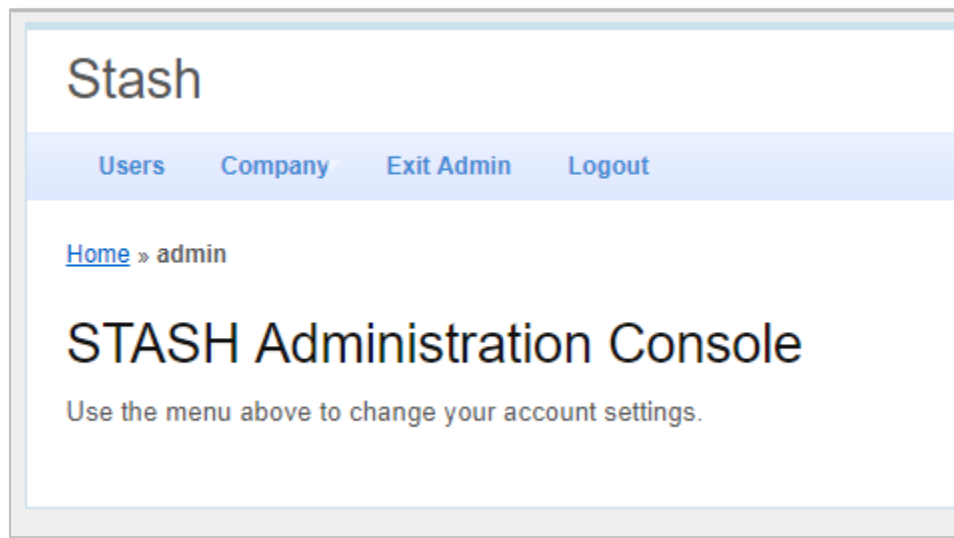
Every STASH business customer has at least one company administrator account. If you are unsure which account(s) have administrator permissions, contact us for assistance.

### Accessing the administrative features:

1. Login to your custom STASH portal.
2. Click the admin “cog” in the menu bar at the top right of the window.



If the “cog” is not visible, the account you are logged in with does not have administrator permissions.



### User Administration

In the user administration pages, you can create, modify, and delete users.

**Note:** The create user functions are only available on certain plans. If the “Create User” button is not visible on the user list page, your plan does not allow you to add new users.

1. To access the user administration, click “Users” in the administration menu.

Username	Email	Sign Up Date	Last Login Date	Plan	# Files	Space Used	Is Suspended	Enabled	
TestUser	test@example.com	01/10/2018	01/10/2018	Demo Portal	4	5.5 Mb	-	enabled	
TestUser2	user2@example.com	01/10/2018	01/10/2018	ArmouredCourier Account	0	5.5 Mb	-	enabled	

2. To delete a user, click the “X” icon to the right of the user you want to edit. Click “Yes” to confirm deletion of the account or “No” to return to the user list. CAUTION: If you delete a user account, the account plus all their data will be deleted. The only exception is with Armoured Courier plans – you can delete user accounts and it will not delete the data in the vault, which will still be accessible to other users. If you delete the Armoured Courier master account, it will also delete all the data in the vault and any remaining users will not have access to the data.
3. To edit a user, click the “Pencil” icon to the right of the user you want to edit. See “Add User” for a description of the user account settings.
4. To create a new user, click the “Add User” button at the top of the user list.
  - a. Username – enter a username; this will be used as the login for the account
  - b. Password – enter a password for the account; passwords must be at least 8 characters long and contain 1 uppercase, 1 lowercase, 1 number, and 1 special character.
  - c. Require User to Change Password on Next Login – check this box to force the user to change their password from the one you set here the next time they login.
  - d. E-Mail – enter the email address to use for the account. This address will receive notifications from [messages@stashdaddy.com](mailto:messages@stashdaddy.com) that their account has been created.
  - e. MFA Enabled – check this box to enable multi-factor authentication for the account.
  - f. MFA Enrolled – this box is read-only, and if checked, indicates the user has successfully enrolled a mobile device in the multi-factor authentication system that STASH uses.
  - g. Account is Locked – check this box to lock the account, which only prevents the user from logging in, even if they have the correct username and password. Setting this option only affects the login and does not change the content or data in the user’s vault.
  - h. Stash Dash Enabled – check this box to allow the user to use the STASH Dash service. *Note – this checkbox may be disabled or read-only if your plan does not include STASH Dash.*
  - i. Num Failed Logins – this box indicates the number of failed logins since the user last successfully logged in.
  - j. Plan – select the plan for this user. The options listed in the drop down list depend on your account and service with STASH.
    - i. Account – this plan is a login only account and does not include any data storage. You might use this type of plan if you are creating administrative accounts that need the ability to login, but do not need their own dedicated storage.

- ii. ArmouredCourier Account – this plan is for accounts tied to an Armoured Courier master account. Any accounts with this plan will have access to the shared Armoured Courier data vault owned by the Armoured Courier Master Account (see permissions below). **To create Armoured Courier accounts, you must have the Armoured Courier Master Account permission.**
- k. Vault ID – this is a read-only box which indicates the unique identifier for the user’s data vault. For Armoured Courier accounts, this ID is the ID of Armoured Courier master account.
- l. Permissions – this is a multi-select box and indicates the permissions assigned to this user account. You may only set permissions up to those that you have on your account; you can’t assign permissions higher than the permissions you currently have. The following permission levels may be available based on your account and plan. You may select multiple permission levels for account by holding the Control or Shift keys and click the permission levels you want to assign to the account. For example, if you want a user account to have both DLP Approver and User access, select both Company DLP Approver and User.
  - i. Company Admin – user is able to change the company information, profile information (including portal colors, logos, etc), administer users for the company, administer the Data Leakage Protection rules and alerts, and approve DLP alerts and notices.
  - ii. Company User Admin – user is able to create, edit, or delete user accounts for the company.
  - iii. Company ArmouredCourier Master – user is the holder of the shared data vault for an Armoured Courier plan and is also able to create, edit, or delete user accounts with access to the Armoured Courier shared data vault.
  - iv. Company DLP Admin – user is able to create, edit, or delete rules for the DLP service and approve DLP alerts and notices.
  - v. Company DLP Approver – user is able to view and approve DLP alerts and notices.
  - vi. User – the “standard” permission level, allows the user to access their data vault.
  - vii. No Access – blocks the user from their vault and any administrative functions.
- m. Last failed login – this read-only box shows the last date / time the user had a failed login. If blank, the user has not had a failed login.
- n. Allow user to view data location map – check this box to allow the user to view the data storage location map through the “Data Map” link available from the user’s data vault page.

## Create Member

Fields with \* are required.

Username \*

Password

User keys are not generated until the user changes their password.

If this is a new account, you should check the force password reset box below too.

If this is an existing account, a forced password reset will be set when you save changes to the password.

Require User to Change Password on Next Login?

Email \*

MFA Enabled ?

MFA Enrolled ?

Account Is Locked ?

Stash Dash Enabled ?

Num Failed Logins

Plan

**CAUTION:** If setting a paid plan here, you must have the user login and update their billing information before the free period trial expires or their account will be suspended

Vault ID

Permissions

Use CTRL to select multiple values

Company DLP Admin	▲
Company DLP Approver	■
User	■
No Access	▼

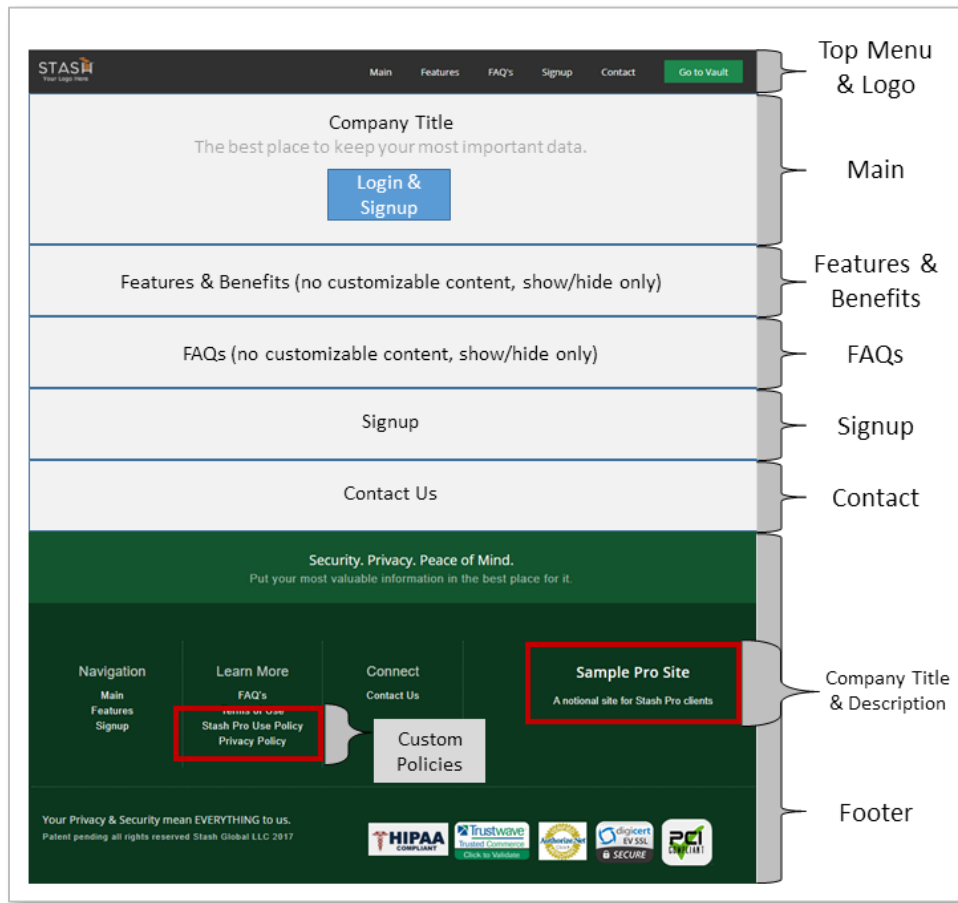
Last Failed Login Date

Allow User to View Data Location Map ?

Create

## Company Portal

STASH create a custom portal for your company to access STASH services. Many elements of the portal are customizable either through the Company Settings or Company Profile Settings. The layout of the landing page and the main menu can be changed – and the following graphic indicates where elements are on the portal page, and which elements can be modified via Company Setting or Company Profile.



## Company Settings

You can configure various company-wide settings if you have “company admin” permissions. If you don’t have this level of permission on your account, these settings are not available to you.

1. To access these settings, click “Company” from the administration menu, then “Company Settings”.
2. You can edit the following settings:
  - a. Company Name – this is your full, legal company name. This name appears on your company’s customized portal landing page right under the top menu in the main section.
  - b. Company Code – this is the 6-11 character code that forms part of your customized landing portal URL (e.g. [www.stashbusiness.com/prosample](http://www.stashbusiness.com/prosample))
  - c. Primary E-Mail address – this email address is where messages sent via the customized portal contact page will be sent.

- d. Company Description – the text in this box appears at the bottom of your company’s customized portal, under your company’s name.
- e. Company website – the URL in this box is linked to your logo at the top left of the customized portal page.
- f. Company Title – this appears in the footer menu at the bottom of the portal landing page above the company description. This is usually the same as the Company Name, but does not need to be the same.
- g. Contact Email Subject – you can customize the subject of auto-responder emails that are sent when someone uses the Contact page on your customized portal landing page. The text in this box is used as the subject for any auto-response emails.
- h. Contact Email Body – you can customize the content of the auto-responder emails that are sent when someone uses the Contact page on your customized portal landing page. The text in this box is used as the body for any auto-response emails.
- i. Is Flex Enabled – this box is read-only and if checked, indicates your plan and services with STASH allow the use of the STASH Flex service to specify which storage locations are to be used.
- j. Company Profile – this box is read-only and indicates which Company Profile is currently in use for your company.

### Update Company: prosample

*Fields with \* are required.*

Company Name \*

Company Code \*

Primary E-Mail Address \*

Company Description

Company Website  
  
(Include the http:// or https://)

Company Title

Contact Email Subject

Contact Email Body

Is Flex Enabled

Company Profile  
  
(This field is read-only, for information only)

3. After making any changes, click the “SAVE” button. Refreshing the browser on your company custom portal will reflect the changes.

## Company Profile Settings

STASH allows you to customize the portal page for your company, including colors, logos, texture maps, policies, and even style sheets through CSS. Refer to the portal layout graphic above.

You can configure various profile settings if you have “company admin” permissions. If you don’t have this level of permission on your account, these settings are not available to you.

1. To access these settings, click “Company” from the administration menu, then “Company Profile”.
2. You can edit the following settings:
  - a. Profile Name – enter a name to identify this profile. “Default Profile” is the default name.
  - b. Main Color – select the main color for your portal and vault dashboard.
  - c. Light Accent Color – select a lighter color for the accent elements on the portal and vault dashboard – including button faces.
  - d. Dark Accent Color – select a darker color for the dark accent elements on the portal and vault dashboard.
  - e. Custom CSS – you can customize the look and style of the STASH Dash preview window that your recipients see by enter your custom CSS elements here. *Note: this only applies to accounts with the STASH Dash service.*
  - f. Text Overlay – you can change the default overlay that appears above media files in the STASH Dash viewer window by entering the text here. *Note: this only applies to accounts with the STASH Dash service.*
  - g. Page Elements – you can select which main page elements are visible on your custom STASH portal, for example, the pricing, FAQ, or Features sections (see the portal layout above).
  - h. Menu Elements – you can select which links appear in the main menu at the top of the page on your custom STASH portal, for example, the pricing, FAQ, Features, or Contact Us links (see the portal layout above).
  - i. Add Users – this box is read only and indicates if you are able to create new users as part of your plan.
  - j. Dash Enabled – this box is read only and indicates if you have subscribed to the STASH Dash service.
  - k. DLP Enabled – this box is read only and indicates if you have subscribed to the STASH DLP service.
  - l. Logo – you can upload your company’s logo and have it appear in the top left corner of your custom STASH portal. Only JPG, GIF, and PNG files are accepted for upload. The profile page shows a light blue background behind the logo to help make the transparent portions of the logo visible – the blue background is not visible on the portal page. Click the “Choose File” button to select your logo – and it will be uploaded and processed when saving the profile.
  - m. Texture – you can set a texture file that is visible in the Main element of the custom STASH portal. By default, your portal will have a fractal texture behind the Main element on the portal page. You can click “Choose File” to select whatever texture file you want (in PNG, GIF, or JPG format) and it will be uploaded and processed when

- saving the profile. If you want to remove the texture file, click the “DELETE” button, and a plain background will be used instead.
- n. Acceptable Use Policy – there is a default acceptable use policy available at the link at the bottom of your custom STASH portal. You can override the content of this and enter your own acceptable use policy by entering the text of it here. You may choose to do this, for example, if you need your own policy for your users of the portal.
  - o. Privacy Policy - there is a default privacy policy available at the link at the bottom of your custom STASH portal. You can override the content of this and enter your own privacy policy by entering the text of it here. You may choose to do this, for example, if you need your own policy for your users of the portal.
  - p. Terms of Service - there is a default terms of service policy available at the link at the bottom of your custom STASH portal. You can override the content of this and enter your own terms of service policy by entering the text of it here. You may choose to do this, for example, if you need your own policy for your users of the portal.

### Update Profile

*Fields with \* are required.*

Profile Updated!

Profile Name \*

Main Color  
 Color:

Light Accent Color  
 Color:

Dark Accent Color  
 Color:

Custom CSS  
  
This CSS is loaded inline on the Dash Preview window

Text Overlay


If blank, 'Intended for viewing only by [recipient email]' will be used

Page Elements Enabled \*  
Use CTRL to select multiple values  
 Signup Section  
 Pricing Section  
 Contact Us Section  
 All On

Title Menu Elements Enabled \*  
Use CTRL to select multiple values  
 Contact Link  
 Login Link  
 Main Menu Link  
 All On

Add Users?  
 DASH Enabled?  
 DLP Enabled?

Logo  
JPG, GIF, or PNG files accepted. A light-blue background has been added behind the logo to show transparent portions of the graphic



No file chosen

Texture  
JPG, GIF, or PNG files accepted.

No file chosen      OR

Acceptable Use Policy

Privacy Policy

Terms of Service

4. Click the Save button to make any changes to your company profile.