



idgard User Manual

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1 Outlook Add-in

1.1 Application Scenario

Integrating the idgard Outlook Add-in into Microsoft Outlook allows you to send confidential content and large attachments easily and safely.



Integrating encrypted emails into your business is often difficult and expensive for your IT. What's more, sending emails to external parties postulates that they use the same encryption system as you. For this reason, many users still don't encrypt their communication.

Not so when using the idgard Outlook Add-In: If you notice an email is too confidential to be sent via regular email, simply activate its transfer via idgard by clicking the idgard button. As soon as you click "Send", you will be led through 3 steps, showing you your options. That's it.

The recipient of your email doesn't necessarily have to be an idgard user. He/she receives a link (and, optionally, an SMS, if further authentication is desired), with which to access the confidential email and attachments.

For a quick overview, see

<https://www.idgard.de/produkt/idgard-labs/outlook/> (includes demo) and

<https://www.idgard.de/pdf/Datenblatt-idgard-Office-Add-In.pdf>

on our idgard website.

1.2 Sending Confidential Messages or Emails with Large Attachments

There are three cases in which you will want to use idgard instead of conventional email:



- If the content of your message is confidential
- If your email attachment is confidential
- If your attachment is too large to be sent by regular email

1.2.1 Manual Selection of Transfer Form via idgard

If any of the above applies, simply click "Send via idgard" and complete your email as usual. The "Send via idgard" button can be turned on and off. It is on, when you see it in bold print. Once you have completed writing your email, simply click the Outlook "Send" button.

Once you have logged on to idgard using your user name and password (if necessary), the following 3 steps will show you your options:

- Decide whether you wish to use a new or an existing idgard Box. If your email concerns an already existing subject or an existing group of people, you will probably prefer using a currently existing Box, to communicate your message and its attachments.
- If you prefer creating a new Box, select the type you wish to create:
 - Temporary Box, for limited communication
 - Regular Box, for lasting communication
 - Data Rooms, for projects requiring much documentation and increased security
- Assign your new Box a name and, if desired, a second authentication factor. Send the intended recipient the latter pass code separately (e.g. by phone or SMS).



1.2.2 Automatic Transfer via idgard for Defined Recipients or Subjects

You can define whether emails intended for specific recipients are to always be sent via idgard, by specifying an Internet domain or certain words in the subject line. To do so, simply go to "Settings", and enter the respective domain and/or key words into the "Filter" tab.



1.2.3 Automatic Transfer via idgard for Large Attachments

You may also define whether you wish for emails with large attachments to always be sent via idgard. Simply enter the respective Internet domain in the "Filter" tab under "Settings".

1.3 Receiving Confidential Messages for Large Attachments

The recipient receives an email, that may include boilerplates that were worded upfront in the settings, in the language selected by the sender. The wording can be adjusted, if necessary, in the settings (provided they are not defined centrally by the administrator, as described in Chapter 1.4).



When the recipient accesses the link, he/she is directed to an idgard website. The recipient is either already an idgard user and simply logs on to the service, or he/she completes the displayed form (to include first, last, and company name), answers the clearance question, and reads and accepts the terms of use. The recipient can then instantly access the box and content defined by the sender.

1.4 Centralizing Settings via an Administrator

Many businesses require that the settings are adjusted centrally by the IT Administrator. This feature is implemented in the idgard Outlook Add-in and can be adjusted as described in Section III of this manual. In this case, the single user can not modify the settings.

1.5 Single Sign-on & Integration into Your Business Network

Should your business have a centralized electronic directory, such as Microsoft Active Directory or LDAP, it can set up the single sign-on feature, to avoid having to repeatedly enter logon data. Once you've logged on to the business network, no further user name and password logon is necessary when using the Outlook Add-in. This setting must be defined centrally or locally via Outlook Add-in, depending on the operation mode.



1.6 Auditable Archiving of Emails Sent via idgard

In order to ensure that messages sent via idgard are also available via archive, users can create mailboxes, to which the original emails intended for archiving are sent. Since they don't normally leave the business network, confidentiality requirements are no reason not to apply this feature.

2 Office Add-in

2.1 Application Scenario

Given you are a Microsoft Office user, i. e., you work with Word, PowerPoint or Excel. There are many files which you wish to exchange regularly with co-workers or external parties; or modify in common, as a team. Or you want to be able to access the files from any device. Or the files are so confidential, that you prefer not saving them locally.



In all of the above cases, idgard Office Add-in provides the following benefits:

- No media interruption: you can work directly per Word, PowerPoint or Excel
- Files are automatically blocked for other Box or Data Room members. That way, redundant work is avoided, if you're working in a team.
- 1 click ("Save"), and the selected members can instantly access the file.
- The files are stored locally only temporarily. The instant you close a file, it is deleted from temporary local memory.¹
- With only a few clicks, you can save open files in idgard, thus making them available to selected members.

When using idgard Office Add-in, all your work is protected by Sealed Cloud technology

2.2 Opening & Modifying Files via idgard

In the Word, Excel, or PowerPoint start menu, you find the option "Open file". Click this option and, if desired, log on to idgard. If a session already exists (or upon logon), you will see a list of all your idgard Privacy Boxes and Data Rooms. Click the box (and, if applicable, sub-folder) with the file you wish to access. The file is then automatically blocked for other box members, downloaded to a local, temporary directory, and opened for editing. Your changes are stored in idgard the instant you click your usual "Save" button. Microsoft's AutoSave feature also automatically updates files in idgard.



on logon), you will see a list of all your idgard Privacy Boxes and Data Rooms. Click the box (and, if applicable, sub-folder) with the file you wish to access. The file is then automatically blocked for other box members, downloaded to a local, temporary directory, and opened for editing. Your changes are stored in idgard the instant you click your usual "Save" button. Microsoft's AutoSave feature also automatically updates files in idgard.

¹ It is possible, due to Windows OS properties. that modified file metadata remain on your device.

When you close the file, idgard unblocks it. The file can then be modified by other Privacy Box or Data Room members and is deleted locally.

2.3 Storing Files via idgard



If you wish to save local files or locally created files per idgard, select the second idgard option in your MS Office application's start menu. Files are then modified as per Chapter 2.2.

2.4 Unlocking Files

When working on files, it is likely that you wish for single files to remain blocked for other Privacy Box or Data Room members. Therefore, if another member requests that you unlock a file, you may access the Box list by clicking one of the two add-in buttons, then navigate to the respective file, and click on the lock, to unlock the file.



2.5 Single Sign-on Integration into Your Business Network

Should your business have a centralized electronic directory, such as Microsoft Active Directory or LDAP, it can set up the single sign-on feature, to avoid having to repeatedly enter logon data. Once you've logged on to the business network, no further user name and password logon is necessary when using the MS Office add-in. This setting must be defined in the Office add-in.



3 Installation

3.1 Initial Installation

For details concerning installation of the MS Office and Outlook add-in, see <https://www.idgard.de/produkt/idgard-labs/> .

The MS Office Add-in may be downloaded for FREE by idgard Full License users.

The Outlook Add-In may be downloaded from the website for FREE by idgard Full License and Guest License clients alike.

Technical requirement: OS as of Windows 7 and Office 2010.

Note: Always download idgard from the www.idgard.de only and never from third parties.

3.2 Automatic Updates

Should you wish automatic updates, kindly adjust set this option under "Settings". In doing so, you help us continuously improve our add-ins.

For silent, centrally managed installations, please contact our support hotline at (+49-89) 41615-987 or business@uniscon.de .

Guidance for Enterprises

Please don't hesitate to ask us about solutions tailored to your specific needs. We can integrate idgard into your system and optimize support of your processes. Simply contact our idgard Business Support Hotline at (+49-89) 41615-987 or business@uniscon.de .