



# idgard User Manual

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## 1 Overview

The idgard Productivity Tool is a free add-on for idgard Full License users. The particularly convenient tool connects idgard with files systems of devices disposing of Windows OS (as of Windows 7) and Windows servers (as of Version 2008). When a user defines a system directory, it is automatically synchronized with the respective idgard Privacy Box. This allows the user to access files saved in this part of idgard even when offline. Users can also save files in local directories, which are then synchronized with idgard automatically the instant they re-access the service.



An especially convenient feature allows the user to open, modify and save and close files in a local directory. Other users of the same idgard Privacy Box can then see the changes made in that respective file, since the initial file was uploaded automatically in the background. One can also adjust the settings to save files locally in encrypted form only.

For customized adjustments, kindly contact our idgard Business Support Hotline: (+49-89) 4161 5987.

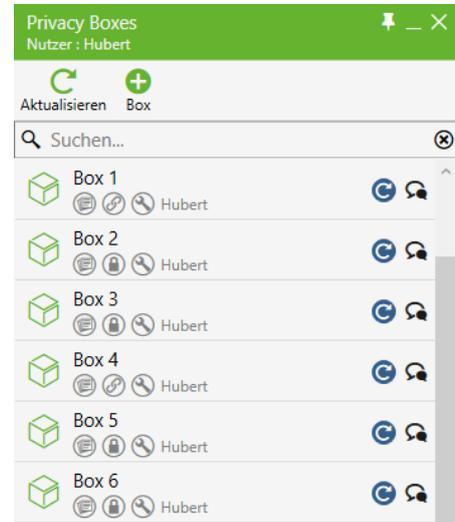
Order your Productivity Tool from the official idgard download server or per business internal roll-out only. Do not download idgard software from third party providers.

## 2 Features & Use

### 2.1 Box List

The Box List is a window on the right-hand side of your screen that may be minimized or hidden. Its name is visible in the green bar. Here, you find a list of all your Privacy Boxes and can create new ones, as well.

- Left-clicking on a box / line opens the app mode.
- Right-clicking on a box / line opens a menu
  - Open local directory (available as of first sync)
  - Modify Box (if you created the Box or are Box Manager)
  - View Box members and their rights (provided you were granted the right) and manage said rights (if you created the Box or are Box Manager)
  - Open chat
- Chat-Fenster für die jeweilige Box öffnen
- Manuellen Synchronisation / Datenabgleich der gesamten Box anstoßen



The Box type is visible under its name, as well as whether or not there is an active link to that Box and what rights you were granted within this data room. Adjacently, you find the name of the creator of that Box.

### 2.2 System Tray Menu

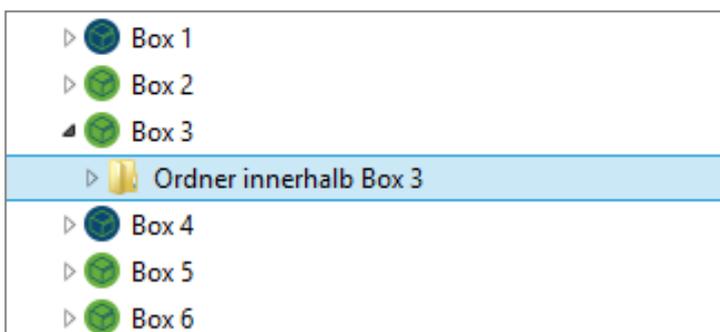


Besides the time and date, the system tray on your Windows desktop customarily also shows you, for example, your network status. Here, you also find the iD icon that opens the local standard directory of File Explorer boxes if left-clicked twice. Left-clicking once opens the Box List. Right-clicking once opens a menu with the following options:

- open Box List (see Section IV, 2.1)
- configure Box connections (see Section IV, 3.6)
- access Event Log (see Section IV, 2.5)

- configure settings (see Section IV, 3.7)
- log-off user without closing session
- log-off and end session
- end session but leave user logged in

## 2.3 Work per File Explorer



### 2.3.1 Work per Auto-Explorer with Auto-Sync

The instant auto-sync is activated for a specific Privacy Box, you no longer have to worry about manually uploading files or synchronizing and updating your data. This is all done automatically according to the rights you were granted in the respective Box and your local settings.

#### 2.3.1.1 Standard Scenario

You have marked and wish to sync a Privacy Box, with which you have worked online for a while. The files in this Box are downloaded automatically and can be found in your local directory. Thus, you can now open a file as usual, modify it, and save it. Uploading the modified file grants other Box members access to that file.

#### 2.3.1.2 Exceptions

As differing combinations of sync parameters, rights within a local file system, and rights per Box increase, so does their complexity. Differing server-side and local file system rights can potentially pose a problem in the following cases:

##### 2.3.1.2.1 The Effect Server-side Deletion Has on Files

If you were granted deletion rights to a file (either, because you created it or the Box, or because you were granted Box management or explicit deletion rights to

all files within that given Box), the Productivity Tool automatically uploads your modified file to the server, where it is overwritten.

If you were not granted deletion rights to that file, the file is versioned when you save it. See Section II, 1.5 of the User Manual for server-side versioning regulations. The downside of working on Explorer files per auto-sync without deletion rights, is that a new version name is created every time you save or download a file. Hence, in order to be granted deletion rights, we suggest you create an own version by using a different name locally and on server-side, or to ask the creator of the Privacy Box or Box Manager to grant you overall deletion rights to all files within that specific Box.

#### 2.3.1.2.2 The Effect of Hidden File Synchronization

If you have activated synchronization of hidden files in your settings and work per auto-sync in a particular Box, temporary files, such as those of Microsoft Office documents, are synchronized, as well. These temporary, source-file dependent files create a new and/or, normally, old version of the file. Synchronization of temporary files can lead to data loss upon file memory, since the most current version of a file is saved and synchronized yet the one you previously saved on the server was a temporary one. As soon as you save the file and sync it in its most current version, Microsoft Office deletes the local temporary file. However, since the file still exists on the server, this version is downloaded and restored, i.e. the old version of the Office file. In other scenarios, this can be quite useful, to record situations automatically or, in the most simple of all cases, to synchronize hidden files, e.g. indexing data.

#### 2.3.1.2.3 The Effect of Deletion per File Explorer

When the right to delete a file via Explorer is activated in the settings, deleting a file from the local directory automatically sends a deletion order to the idgard server, so that the file is also deleted from the cloud. If you were not granted deletion rights to a file that you deleted locally, that file is downloaded.

### 2.3.2 Work per File Explore with Manual Sync

In order to sync files and folders manually, synchronization has to be activated via Box List. This creates a local directory that can be used for future sync activity. If files are then modified or new ones added, the following sync uploads those files, so other users can download them.

## 2.4 Work per App Mode



App Mode offers full idgard access and represents a symbiosis of local work, on-demand teamwork, and purely online options. It substitutes browser access in terms of file level features and offers chat and internal messaging options, that are not visible per file Explorer. For compli-

ance reasons, Data Rooms are not synchronized with local directories, either. This also makes App Mode the perfect application with which to access data, since it allows the user to upload even complex folder structures into a Data Room per drag & drop:

### Create Content:

- Create folders
- Mark items as "read" or "unread"
- Upload files with upload function or per drag & drop, upload folders and directories only per drag & drop
- Create new folder
- Download files and folders

### Modify Content:

- Lock file for modification
- Automatic modification recognition
- Upload and overwrite file upon modification

### Remove Content:

- Delete files and folders
- Move files and folders

### Manage Messages:

- Read, create, and answer messages
- Move and delete messages

### Further Features:

- Supports Drag & Drop  
Per drag & drop, you may move an entire file directory from the Explorer to App Mode; it is then indexed, creating a waiting loop, and the files are uploaded.
- Supports Data Rooms

For compliance reasons, Data Rooms can not be synchronized with File Explorer. With App Mode, the user can access all Data Room features, irrespective of the browser, and work in his/her familiar environment on-demand.

- **Directory Overview**

In the App Mode header, you find clickable paths, that not only indicate your current position among the files but also carry a link, with which you may jump to other folders directly within that path.

## **2.5 Event Log**

The Event Log is a user specific protocol feature, that records all activity performed by said user and the Productivity Tool. It may also be exported. The Event Log can be deactivated in the settings found under General Settings.

## 3 Installation, Set-up, Configuration

### 3.1 Minimum Requirements

Component	Requirement
Computer & Processor	1 GHz minimum, x86 or x64 processor with SSE2 instruction set
Memory	2 GB RAM
Hard Drive	50 MB minimum, plus sync memory. Please note that backups and the data recovery directory require further memory.
Screen	Minimum screen resolution:1280 x 800
Graphics	Graphics hardware acceleration requires a DirectX10 compatible graphics adapter.
Operating System	Windows 7 Service Pack 1, Windows 8, Windows 8.1, Windows 10, Windows Server 2012 R2, Windows Server 2012 or Windows Server 2008 R2  For optimum user experience, we suggest using the latest version of the respective OS.
Internet	At least one Internet access must be available. A fee may incur through your Internet provider, e.g. for mobile data use.
Function Dependence	Use of the Productivity Tool requires a Full idgard License.
	Availability of the service in environments protected by firewalls and proxy servers requires knowledge of the respective parameters.
	For icons displaying the sync status of files and folders to be clearly visible in the Windows Explorer, no more than 10 icons may be entered in the registry prior to this, since Windows only allows a maximum of 16 entries.

### 3.2 New Installation (Standard Version)

New users merely have to run the respective installation file, to access it. The first step opens a window with welcoming notes that include the version number. Simply confirm, to continue.

You may then choose between standard and customized installation.

If you opt for standard installation, you can click "install" in the same step, which installs the software. Once installation is completed, you may close the installation helper and start the program through the Windows start menu entries or the software index.

In contrast, customized installation tailors to the following:

#### Directory

Standard installation files the directory under *C:\Nutzer\Nutzername\VDGARD*. This is the path under which synchronized data is saved if it is not customized. The individual Boxes are then created with the respective Box name pursuant to *(...)VDGARD\* and the files stored in the Boxes accordingly. The directories are also adjustable retroactively for each Box, so that one Box name may be used for differing paths. Customized installation allows the user to define this standard path arbitrarily to one's liking. Since Windows accepts also limited path lengths, and deep data structures result in idgard paths appearing too lengthy, we suggest a path that is as short as possible, e.g. *D:VDGARD\*.

### Single Sign-On

Standard installation does not foresee Single Sign-On. Should you wish to set this option during installation, customized installation allows you to enter the proxy host URL.

### Multiple Users Accessing One Device

Standard installation does not imply parallel use by multiple users. Should you wish to create multiple standard directories and prepare the device for multiple idgard users, you can activate this during customized installation. This feature does not affect the fact that you may log out with a standard installation and log in with another user, and only makes sense if the device is used by multiple permanent users simultaneously, who should not be able to influence the files of the respectively other parties.

## **3.3 Update of Current Installation**

The latest update of a version that is cleared for public idgard Full License use, may be downloaded from the official idgard website. It is imperative that users realize that Uniscon GmbH, in its presentation as idgard, has exclusive provider rights to the Productivity Tool and its updates available on the official idgard download server. Should you find a further offer, please contact our idgard Business Support Hotline: (+49-89) 41615987.

### **3.3.1 Update of Standard Version**

This version includes optional routine updates, that automatically download the latest version from the official idgard download servers.

The update is possible any time and merely requires that the installation file of the new version is downloaded and run. The installation helper automatically recog-

nizes whether a supported previous version already exists in the system and adjusts itself accordingly.

### **3.3.2 Update of Customized Deliveries**

If the users received the version per business internal roll-out, or if an individual version was delivered to your company, please contact the contact person assigned to you. Should you not know who that is, kindly call the idgard Business Support Hotline: (+49-89) 41615987.

## **3.4 Further Versions**

Versions that are customized to customers' needs, e.g. integration into existing IT infrastructures, are available upon request. Feel free to discuss further possible scenarios with your idgard team.

### **3.4.1 Installation/Updates per Packet Assembly and Internal Roll-out**

Many clients favour packet assembly and still installation onto managed devices as roll-out method. For more, contact the idgard Business Support Hotline: (+49-89) 41615987. [business@uniscon.de](mailto:business@uniscon.de).

## 3.5 Start & Login

### 3.5.1 Starting the Productivity Tool

Start the program via auto boot when starting the system or with the familiar links in the start menu, on the desktop, or (per double-click) in the installation directory idgard.exe file.

### 3.5.2 Login Requirements

To log in successfully, you need a full idgard license, a user name and password, and, if applicable, your second authentication factor.



The screenshot shows the iDGARD login page. At the top center is the iDGARD logo, consisting of a green cube icon followed by the text 'iDGARD' in blue. Below the logo are two input fields: the first is labeled 'Nutzername' and the second is labeled 'Passwort'. A green button with the text 'einloggen' is located below the password field. At the bottom of the page, there are two links: 'iDGARD Startseite' and 'Passwort vergessen?'.

#### 3.5.2.1 License

You must dispose of a Full License, in order to be able to use the Productivity Tool. More information on licenses is available in Section II, 2. of the User Manual. Should you have questions, kindly contact your Administrator or the party that invited you to use idgard.

#### 3.5.2.2 User Name & Password

Your user name and password are necessary for log in. Should you have forgotten your user name, password, or both security cachets, please contact the Administrator that granted you your Full License.

#### 3.5.2.3 2-Factor Authentication

Should you need a second factor to log in, you must enter it upon having entered your user name and password.

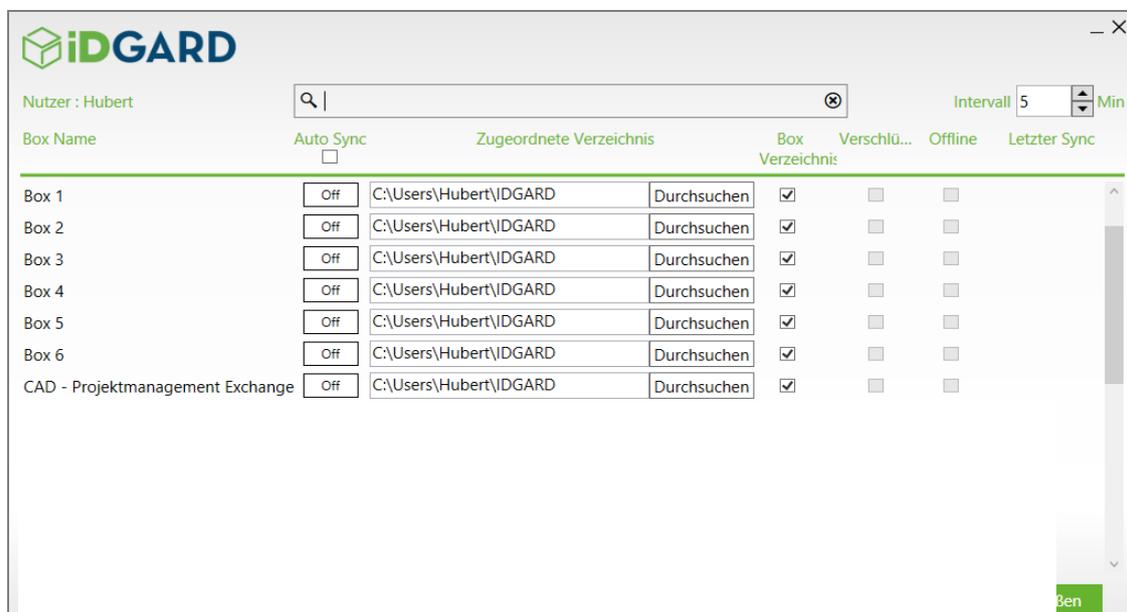
If you have chosen, e. g., SMS as second factor, you will be sent, once you have entered your user name and password, an SMS with a code, that is sent to the mobile number mentioned in your profile and that your Productivity Tool will then ask you to enter. The Productivity Tool starts, as usual, the instant you enter the second factor successfully. If you wait too long before entering the SMS code, you must log in again and reconfirm your user name and password. You will then receive a new SMS code.

### 3.6 Setting up Box Directories and Sync Options

When booting for the first time, you are automatically routed to the "Box links" window. These are also always available when right-clicking the iD icon on the bottom right of the system-tray menu.

#### 3.6.1 Auto-Sync & Manual Sync

The Box links window lists all your Boxes. Next to the single names, you may activate or deactivate auto-sync any time. If auto-sync is deactivated, you may also trigger manual synchronization for each Box individually any time. In App Mode, one can also synchronize individual files, without having to synchronize the entire Box.



#### 3.6.2 Standard & Customized Box Directories

You may assign an own directory to each individual Box. In the first instance, you will always find the standard directory, that you chose during your customized installation.

If "Box Directory" is check-marked, a further folder is created in the standard directory with the Box name, that then includes the Box data. If you wish to sync Box content in a directory directly with other names, simply un-check this Box, so that no Box directory is created. The Box content is then uploaded directly to the selected directory: e. g., a Box named "Papers" is to have the same content as „C:\User\User Name\Documents\“. If the directory is check-marked, a folder with the Box name "Papers" would be created pursuant to named path and its content then synchronized.

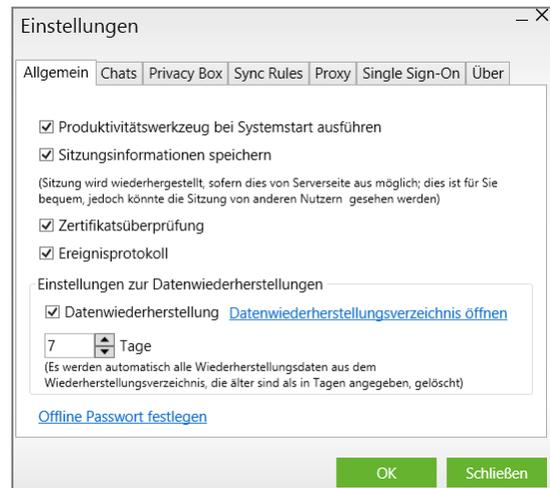
### 3.6.3 Encryption & Offline Decryption of Local Data

In addition, one can encrypt all synchronized data locally. Should this data be decryptable even without Internet access, one must set an offline password.

## 3.7 Settings

### 3.7.1 General Settings

- Run Productivity Tool upon system start (auto boot)
- Save session data  
The session is recovered, provided this is possible server-side. I.e., should you have closed your Productivity Tool without logging off, you may continue working without having to again log on, if the server still has an active session for you.
- Certificate verification  
This feature verifies server-side certification, in order to prevent man-in-the-middle attacks upfront. For security purposes, the feature should always be activated and only deactivated for, e.g. proxy system debugging purposes during test runs.
- Event Log  
The Event Log is a log feature that reflects all Productivity Tool activity with a correlating time stamp. If activated, the protocol shows you who did what when with what data.
- Data recovery (Beta)  
If you wish to maintain, irrespective of the Windows recycle bin, a waste-basket that stores all your deleted data for a defined period of time, before deleting it irrevocably, activate the data recovery feature. From here, you may also open the data recovery directory.
- Offline password  
An offline password is only necessary in one particular case. If you wish to save a Box locally in your system in encrypted form and be able to decrypt the data even when there is no Internet connection, you need a password for encryption. The password is defined here or during configuration under



the system-tray menu item "Box links"; see Section IV, Chapter 2.2 of the User Manual.

### 3.7.2 Chat Feature

- Automatic access to new chat messages  
Minor modifications of the Chat feature may be carried out in the second tab of your settings. You may define, e. g., that, when new chat messages appear in an arbitrary Box, the respective chat window of that Box is opened and shown in the foreground on your desktop. At the same time, the notification is marked as read.
- Notification tone  
The idgard notification tone may also be activated or deactivated.

### 3.7.3 Manual Sync Settings

With the third tab, you may define whether local files should be deleted upon update.

Example: Provided a Box is not synchronized automatically, it is advisable to download a file per App Mode on-demand and lock it, so that no third parties can modify it (automatable). To do so, simply double-click the desired file. This downloads and opens it. Once you have finished modifying the file, save and close it. App Mode shows you that the Productivity Tool recognized your changes. The file is uploaded and decrypted (updated) with only one click on the cloud icon. This feature allows you to save memory and work on-demand. Activate this feature, if you wish for a file to be automatically deleted once it is updated.

### 3.7.4 Auto-Sync Settings

- File Explorer status icons  
Special icons in the Windows File Explorer can show whether a file is synchronized and/or whether the file is possibly currently being synched or locked. This feature can be activated here.
- Deletion in File Explorer  
To prevent data loss on server-side, one can define whether or not local deletion should be transmitted directly to the server and deleted by the server, as well.
- Mark files as read upon download

If you do not need to save synchronized files locally as unread, first, until you actually open and/or mark them as read, you may mark them as read the instant you download them (e.g. machine-to-machine communication)

- **Do not sync hidden files**  
Windows holds several hidden files, often, e. g., temporary files or folder index files, where it would make little to no sense to sync them. This option is active in standard settings, to prevent idgard cloud issues when temporary files are synched, e. g. that an old status is restored in Office instead of the new file.
- **Exclude file types from sync**  
Some file types are intended for sync; the file endings may be listed here, separated merely by a comma.

### **3.7.5 Defining Proxy Server Parameters**

If you wish to enter a proxy, you can do so in this tab. Mind the capital and lower-case letter spelling in your parameters.

### **3.7.6 Defining Single Sign-On Domains**

The same is applicable for Single Sign-on settings, with which to define the EMS URL. Example: `https://<ems-proxy-host>/idgard/clientlogin`

### **3.7.7 Version Data**

The last tab of your settings shows you which version you are using.

## **4 Licenses, Roles, and Rights Overview**

See Section II, Chapter 2 of the User Manual.

## **5 Integration of LDAP/Active Directory**

See Section III, Chapter 4 of the User Manual.

## **Enterprise Guidance**

Please don't hesitate to contact us for a custom-made solution tailored to your specific needs. We can integrate idgard into your systems and optimally complement the support of your processes. Simply call our idgard Business Support Hotline: (+49-89) 41615987 or send us an e-mail: [business@uniscon.de](mailto:business@uniscon.de).