# Getting Started

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# idgard Sync



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# Getting Started

Welcome to the *getting started* of **idgard Sync**.

The idgard Sync is a Windows app that brings your idgard workspace directly into your daily desktop workflow.

> **NOTE**
> With idgard Sync, your files are available in Windows Explorer just like a familiar cloud drive, while keeping the security standards of idgard.

With **idgard Sync**, you can access your idgard files directly in Windows Explorer, keep content synchronized, and work with files locally.

To start the app, search for **idgard Sync** in the Windows Start menu. After launch, you can control it from the tray icon next to the Windows clock. You can also enable auto-start so the app starts with Windows.

## Windows Integration

- Tray Icon
- Windows Explorer
- Storage Sense
- Setup in Windows
- Custom URL Protocol

## Use Cases

- First Sync
- Tray Menu and Status Indicators
- File Explorer Operations
- Roles in idgard
- Icons per File-Extension

## Views

Dialogs (windows) which are part of the app.

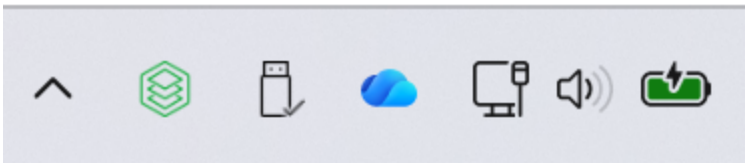
- Splash Screen
- About
- Login View
- Box Selection View
- Sync Overview
- Activity View
- Application Settings
- New Version Window

# Help


- Support Request
- Known Limitations
- Recovering From Error Situations
- Release Notes
  - 1.2 – v1.2.0.8904
  - 1.1 – v1.1.2.8107
  - 1.0 – v1.0.0.7414

# Tray Icon

The tray icon (next to your Windows clock) is the quickest way to open and control **idgard Sync**.



**TrayIcon**

If you do not see the icon right away, click the up arrow in the taskbar to show hidden icons. You can pin it for faster access.

You can use these mouse actions:

- **Single Left Click**
  Opens the SyncOverview.
- **Double Left Click**
  Opens your **idgard drive** in Windows Explorer (when you are signed in) or the LoginView.
- **Single Right Click**
  Opens the **context menu** with actions such as account options, settings, and sync controls.

# Windows Explorer

idgard Sync appears in Windows Explorer as a Cloud Storage entry, similar to OneDrive or OneDrive Business.




When you open the idgard entry, you see all of your boxes (PrivacyBoxes, TemporaryBoxes, and Data Rooms).

> **TIP**
> You can jump to the box list by typing *idgard* into the Windows Explorer address bar.

If the icon does not appear in Windows Explorer, start the app once from the Windows Start menu and double-click the Tray Icon.

# Storage Sense

Windows Storage Sense can also manage the idgard drive shown by idgard Sync.

The relevant setting is **Locally available cloud content**. See Microsoft documentation: Configure Storage Sense

## What it does

If a file from the idgard drive was downloaded locally but is not used for some time, Windows can change it back to **online-only** to free disk space.

The file is still visible in Windows Explorer and is downloaded again when opened.

## Important to know

- Storage Sense does not delete the file from idgard.
- It only removes the local cached copy from the device.
- Files marked with **Always keep on this device** are not affected.
- Windows applies the value `30 days (default)` for the idgard drive, unless the user changes it manually.

## Recommendation

Use this setting if you want to save local disk space but do not need all files from idgard offline all the time.

# Setup in Windows

After installing idgard Sync, it is worth adjusting a few Windows settings so the app is easier to access in daily use.

## Pin the app to the taskbar

To pin idgard Sync to the taskbar:

1. Open Windows Search from the taskbar.
2. Type `idgard Sync`.
3. Select the app entry.
4. Click `Pin to taskbar`.

This keeps the app within easy reach, even when it is not currently visible in the notification area.

## Keep the tray icon visible

Because many actions are available from the tray icon, it is recommended to keep the icon visible at all times.

1. Right-click an empty area of the taskbar.
2. Open `Taskbar settings`.
3. Go to the settings for other taskbar icons.
4. Find the `idgard Sync` entry.
5. Turn the switch on so the icon stays visible.

Once idgard Sync is running, the tray icon should then remain directly accessible.

## Disable or enable auto-start

By default, idgard Sync starts automatically with Windows. If you only use the app occasionally, you can disable this behavior.

To disable auto-start:

1. Open the tray icon context menu with a right-click.
2. Select `App Settings`.
3. Scroll down and open `Windows Settings - Startup`.
4. Find `idgard Sync` in the list of apps.
5. Set the switch to `Off`.

To enable auto-start again, follow the same steps and set the switch back to `On`.

# Custom URL Protocol

`URL_SCHEME` is the tenant name in lowercase (e.g. `idgard`).

idgard Sync registers a custom URL protocol (`URL_SCHEME://`) that allows you to trigger application actions directly from links in emails, web pages, or other applications. When the protocol handler is registered, clicking a `URL_SCHEME://` link launches the idgard Sync CLI tool `idgard-cli.exe` and executes the corresponding command.

## Activation

The custom URL protocol handler is disabled by default. It can be enabled via the `CustomUrlProtocolEnabled` setting in the application configuration. When enabled, the application registers the `URL_SCHEME://` scheme in the Windows Registry under `HKEY_CURRENT_USER` — no administrator privileges are required.

## URL Format

```
URL_SCHEME://<command>[/<primary>][?<key>=<value>&<keyN>=<valueN>]
```

- `<command>` — The action to execute (see commands below).
- `/<primary>` — An optional path segment that maps to the command's primary option.
- `?<key>=<value>` — Optional query parameters that map to CLI options by name. The `?` prefix marks the start of the query string and is required before the first parameter.
- `&<keyN>=<valueN>` — Additional query parameters, separated by `&`. Multiple parameters can be chained this way.

> **NOTE**
> The scheme prefix is always `URL_SCHEME://`. Path values and query parameters are URL-encoded.

## Common URL Encodings

| Character | Encoded | Description |
|---|---|---|
| Space | `%20` | Used in folder or file names containing spaces. |
| `:` | `%3A` | Colon — appears after the drive letter (e.g. `C%3A`). |
| `\` | `%5C` | Backslash — Windows path separator. |
| `/` | `%2F` | Forward slash — alternative path separator. |
| `?` | `%3F` | Question mark — must be encoded inside path segments. |
| `&` | `%26` | Ampersand — must be encoded inside query parameter values. |
| `=` | `%3D` | Equals sign — must be encoded inside query parameter values. |

## Available Commands

## Reveal in Explorer (`_reveal`)

Opens Windows Explorer at the specified path. If the path points to a file, the file is selected in its parent folder. Omitting the path opens the sync-root folder.

| Parameter | CLI Option | Description |
|---|---|---|
| path *(optional)* | `--path` | Absolute path or path relative to the sync-root folder. |

**Examples:**

```
<!-- Opens the sync-root folder in Windows Explorer -->
URL_SCHEME://_reveal

<!-- Opens Windows Explorer with C:\Users\me\Documents\report.pdf selected
(absolute path) -->
URL_SCHEME://_reveal/C%3A%5CUsers%5Cme%5CDocuments%5Creport.pdf

<!-- Opens Windows Explorer at MyBox\report.pdf relative to the sync-root folder -
->
URL_SCHEME://_reveal/MyBox%5Creport.pdf
```

**Real Examples:**

- Reveal sync-root folder in Windows Explorer.
- Reveal Getting Started.pdf in Windows Explorer.

## Open in Web (`_nav`)

`TENANT_NAME` is "idgard".

Opens a idgard item in the web frontend using the system's default browser.

| Parameter | CLI Option | Description |
|---|---|---|
| id | `--id` | The idgard item ID. |
| hostname | `--hostname` | The idgard server hostname (e.g. `TENANT_NAME`). |
| user-id | `--user-id` | The idgard user ID. |
| action *(optional)* | `--action` | The action to perform: `NavigateTo` (default) or `Settings`. |

**Examples:**

```
<!-- Opens item b0123 in the TENANT_NAME web frontend for user u456 on TENANT_NAME -->
URL_SCHEME://_nav?id=b0123&hostname=TENANT_NAME&user-id=u456

<!-- Opens the settings page for item b0123 directly -->
URL_SCHEME://_nav?id=b0123&hostname=TENANT_NAME&user-id=u456&action=Settings
```

# First Sync

## Requirements

To complete your first sync, you need:

- an installed version of idgard Sync
- your own idgard account
- at least read permission for the boxes or Data Rooms that you want to synchronize

If read permission is missing, a box cannot be added to the local drive. For more information, see Roles in idgard.

## Sign in and select boxes

After clicking the app icon in the taskbar, the sign-in window opens.

1. Enter the username and password of your idgard account. Alternatively, you can switch to the `Single Sign-on` tab and sign in using your domain URL.
2. Sign in.
3. Select the boxes that you want in the box selection window.
4. Start synchronization.

Windows Explorer then shows the idgard drive with the selected boxes as subfolders.

## What is downloaded during the first sync

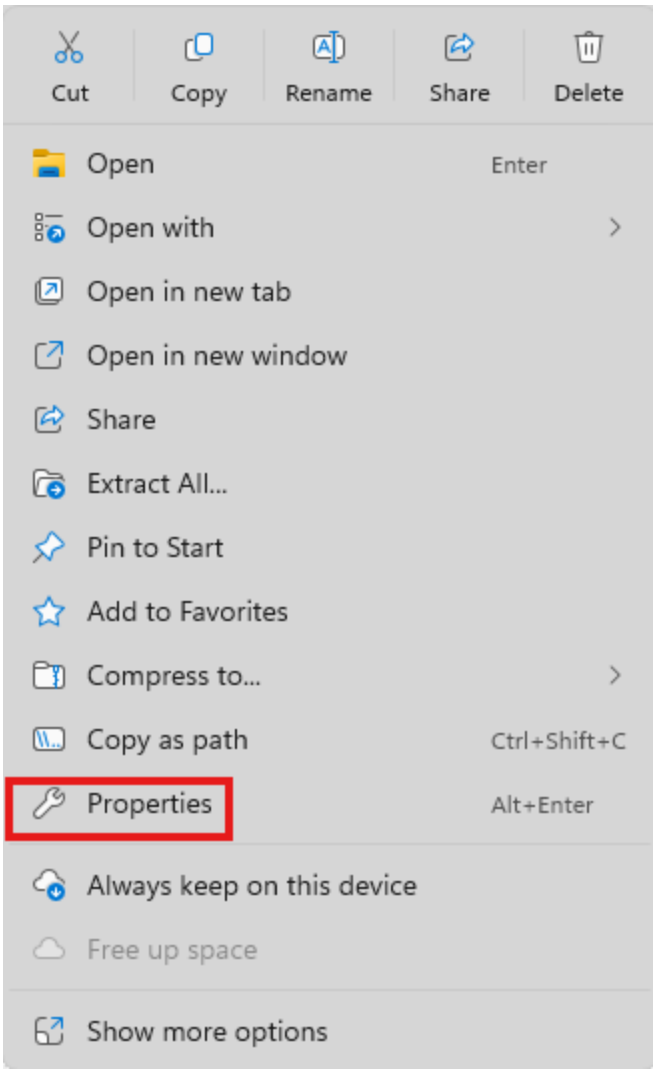
During the first sync, only metadata for the selected content is transferred to the device. The files themselves initially remain in the cloud.

This metadata includes, for example:

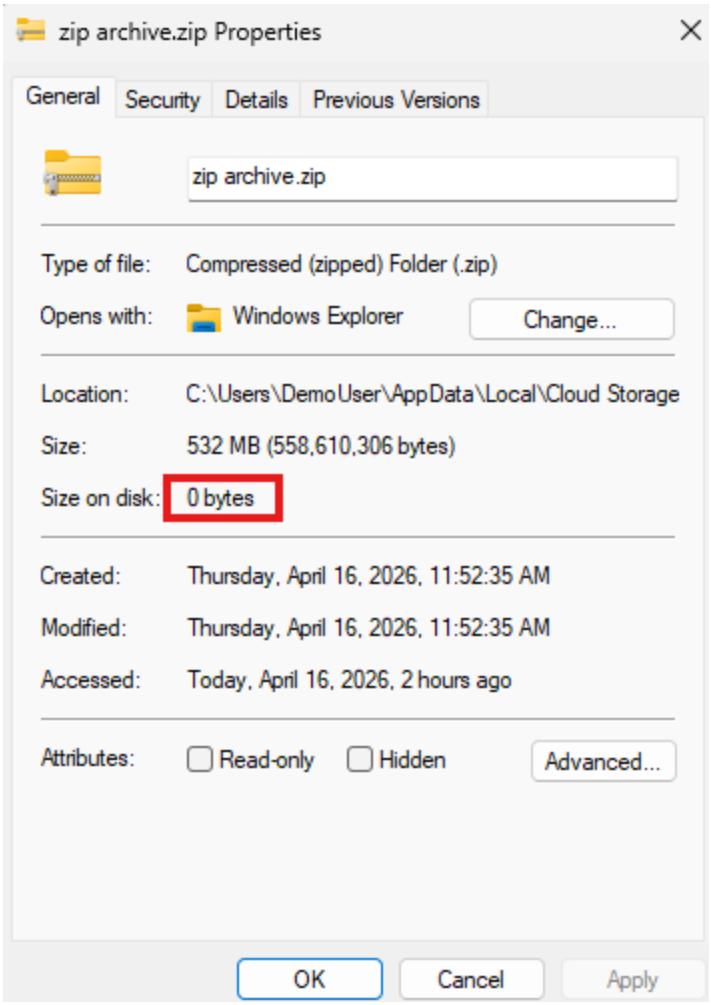
- file name
- file size
- unique file ID
- folder ID

This is why content can already be visible in File Explorer even though it does not yet consume local disk space.

When you open `Properties` from the context menu, pure placeholder files will typically still show `0 bytes` as disk space used.




**Context menu with the Properties entry highlighted**




**Properties of a placeholder file showing 0 bytes of local disk usage**

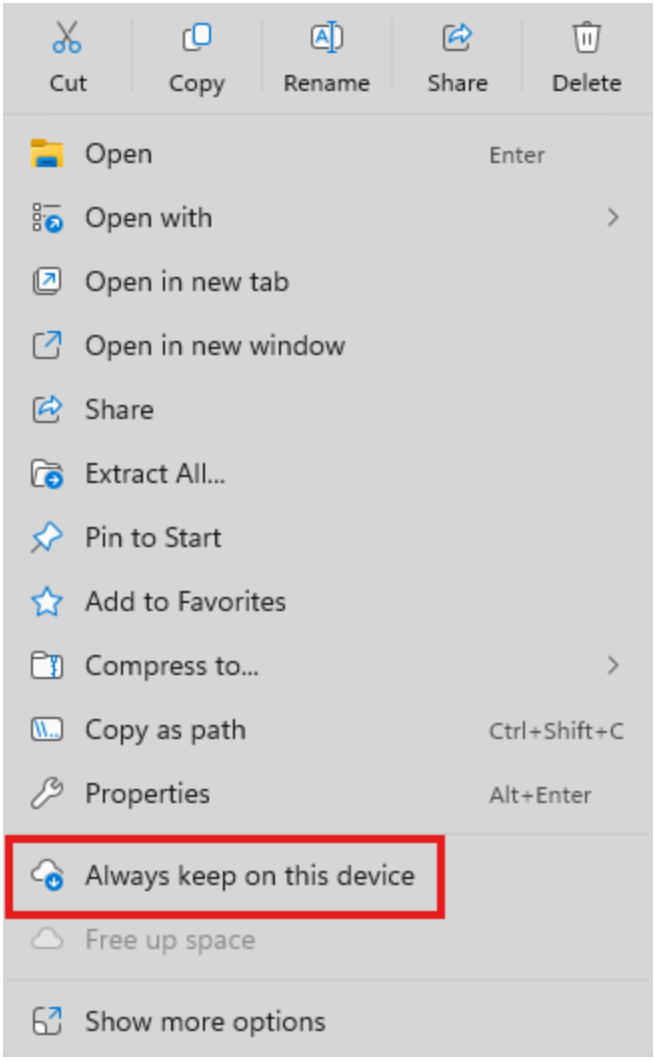
# Download files on demand

A file is downloaded locally when you open it or choose `Always keep on this device` from the Windows context menu.

Typical results:

- Double-clicking downloads the file and opens it in the associated Windows application.
- The context menu can be used to make the file available offline on purpose.

- The file only uses local storage after it has been downloaded.




**Context menu with the Keep on this device entry highlighted**

# Download folders or complete boxes

The same principle also applies to folders and entire boxes.

- If you set a folder to `Always keep on this device`, its contents are downloaded gradually. For large folders, only a portion of the files starts downloading immediately — the rest are queued during the next synchronization, provided the Automatic Downloads setting is enabled.
- If you do the same for a box, the action applies to all contained folders and files.

Depending on the amount of data, this process may take some time. Make sure there is enough free disk space on the device before you start.

# Status icons in File Explorer

The `Status` column in File Explorer shows content with different status icons. There are five basic states:

Normal sync statuses are:

- only available in the idgard box
- available on the device

- always available offline on the device

During synchronization, the following status is displayed:

- currently synchronizing or updating

Additionally, there is also the error status:

- synchronization error

These status indicators help you understand whether a file is still only a placeholder, has already been downloaded, or is currently being processed.

# Tray Menu and Status Indicators

The tray icon is not only an entry point into the app, but also the central control for account actions, synchronization, and status information.

## Account menu

In the idgard `Account` area, different actions can appear depending on the current sign-in state.

When no account is connected yet:

- `Show login` opens the sign-in window.

When an account is already connected, these options are typically available as well:

- `Show login`
- `Sign out`
- `Remove user account`

`Sign out` ends the current sign-in session, but the app keeps running. `Remove user account` removes locally stored sync data for that account from the device. The data in the server account remains unchanged.

## Select sync boxes

This menu item opens the box selection again.

The following applies:

- newly selected boxes are added locally and synchronized
- deselected boxes are removed locally
- deselecting boxes does not delete content on the server

If you remove a box from synchronization, this affects all local states inside that box, including content that was previously marked for offline availability.

## Sync

The `Sync` submenu provides direct control over the synchronization process:

- `Start partial sync` is an option to start the sync process manually without waiting for the next automatic sync
- `Start full sync` triggers a complete re-sync of all locally selected boxes. A dialog appears before the sync starts to confirm the potentially time consuming action.
- `Cancel sync` stops an ongoing synchronization.

## Important options in App Settings

`App Settings` provides access to features such as:

- changing the app theme
- selecting the language
- setting the auto-sync interval
- opening the log folder
- configuring Windows auto-start

According to the source documentation:

- A theme change takes effect immediately.
- A language change requires an app restart.
- Changes to the sync interval also require a restart to take full effect.

# Exit the application

`Exit` closes the application in Windows. If synchronization is still running, the app asks for confirmation first. The current action is typically completed cleanly before the app exits.

# Tray icon states

The tray icon also reflects the current state of the application. This includes, in particular:

- synchronization successful
- metadata synchronization in progress
- data synchronization in progress
- error state

Depending on the state, additional details may be available by hovering over the icon or clicking it. From the success state, you can also open the Activities view.

# How folder status is determined in File Explorer

The status of a folder is not determined only by the `Always keep on this device` setting on the folder itself. What matters is the combined state of the contained files and subfolders.

The priority described in the source documentation is essentially:

1. An active synchronization process inside the folder determines the folder status.
2. Otherwise, an online-only cloud state takes precedence.
3. Next comes the state of a file that has already been downloaded.
4. If all contained items are available offline, the folder is also shown as available offline.

Because of this, a folder can temporarily show a different status even though an offline option has already been set, as long as individual contained items are still in a different state.

# File Explorer Operations

## Deleting files and folders

You can delete files and folders directly in Windows Explorer. Before carrying out the delete on the server, the app checks whether the **idgard Recycle Bin** is active for the box:

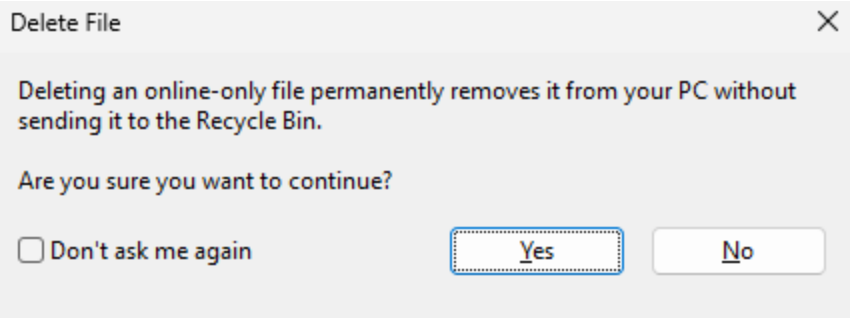
- **idgard Recycle Bin active:** The item is moved to the idgard Recycle Bin and can be restored from the idgard web application.
- **idgard Recycle Bin inactive:** The delete is **blocked** by default — Windows reports the operation as denied and the item remains in place.

To allow deletion in boxes without an active idgard Recycle Bin, enable **Allow deletion of files and folders via Windows Explorer in boxes without an active idgard recycle bin** in Application Settings. Items deleted with this option enabled are **permanently deleted** with no possibility of recovery.

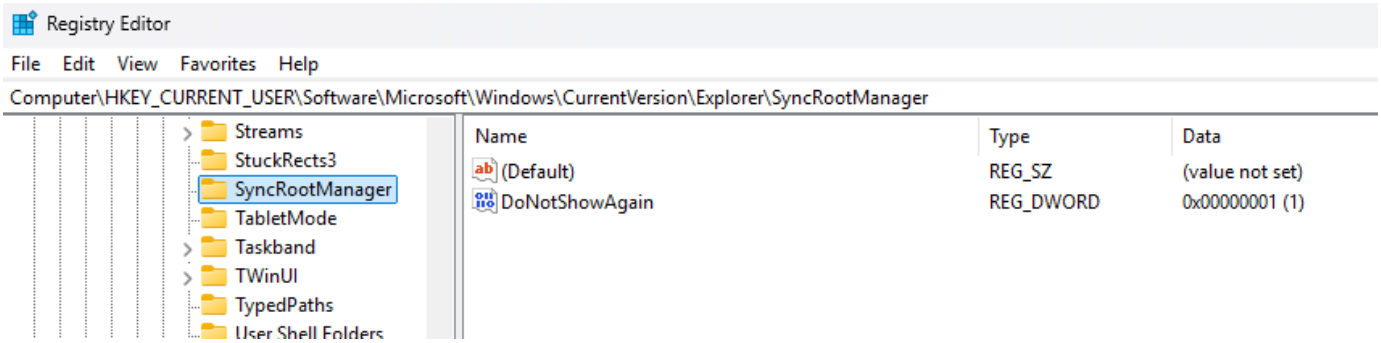
When the delete proceeds, what happens on your device depends on whether the file was downloaded:

**Downloaded files:** The local copy is moved to the Windows Recycle Bin and can be restored from there. If you restore the file from the Windows Recycle Bin, it is uploaded to idgard as a new item on the next sync.

**Cloud-only (not downloaded) files:** Windows shows a confirmation dialog before removing the item. These files are local placeholders with no content stored on the device, so they are not moved to the Windows Recycle Bin.




If you selected **Don't ask me again** and want to restore the dialog, set the `DoNotShowAgain` value to `0` or delete it in the Windows Registry under `HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Explorer\SyncRootManager`.




## Renaming files and folders

You can rename files and folders directly in Windows Explorer. The rename is applied to the corresponding item on the idgard server.

## Moving files and folders

You can move files and folders within the same box in Windows Explorer. The move is applied to the corresponding item on the idgard server.

> **NOTE**
>
> Moving items across boxes or outside the idgard drive is not supported. In those cases, the action is blocked.

# Roles in idgard

For idgard Sync to work reliably with a box, the assigned permissions must be suitable for synchronization.

## Suitable roles

In idgard, different roles can be assigned to a box, for example:

- Creator
- Manager
- Editor
- Viewer
- Upload Assistant
- Assistant in Data Rooms

These roles are especially suitable for synchronization:

- `Creator`
- `Manager`
- `Editor`

These roles generally allow both reading and meaningful write-back of changes.

## Roles with limitations

Some roles are only partially compatible with local synchronization:

- `Viewer` can read and download content locally, but cannot write back local changes.
- `Upload Assistant` is only suitable to a limited extent, because uploads are possible but synchronization remains functionally restricted.
- An `Assistant` in a Data Room can create folders, but cannot fully access or work with files.

## Recommendation

For the smoothest experience, the role `Editor` is recommended for participating users whenever this is appropriate from a business and governance perspective.

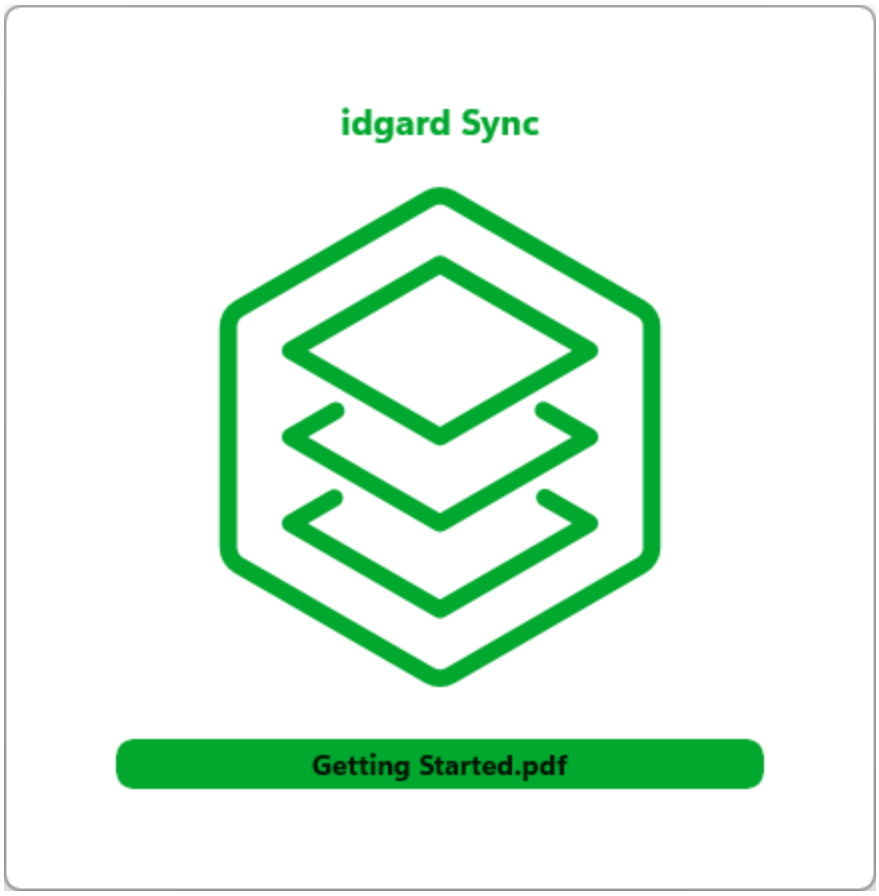
# Icons per File-Extension

| Image | Extensions |
|---|---|
|  | accdb, mdb |
|  | 7z, ace, arc, arj, dmg, gz, iso, lzh, pkg, rar, sit, tgz, tar, z |
|  | aif, aiff, aac, alac, amr, ape, au, awb, dct, dss, dvf, flac, gsm, m4a, m4p, mid, mmf, mp3, oga, ra, rm, wav, wma, wv |
|  | ical, icalendar, ics, ifb, vcs |
|  | abap, ada, adp, ahk, as, as3, asc, ascx, asm, asp, awk, bash, bat, bib, c, cc, cfm, clj, cls, cmake, cmd, coffee, config, cpp, cs, cshtml, css, cxx, d, dart, fs, go, groovy, h, hpp, htc, ini, java, js, json, jsx, less, log, lua, md, php, pl, ps1, py, r, rb, rs, sass, scala, scss, sh, sql, swift, tsx, vb, yaml, yml, zsh |
|  | csv |
|  | doc, docm, docx, docb |
|  | dot, dotm, dotx |
|  | eml, msg, oft, ost, pst |
|  | application, appref-ms, apk, app, appx, exe, ipa, msi, xap |
|  | ttf, otf, woff |
|  | htm, html, mht, mhtml |
|  | nnb, ipynb |
|  | lnk, link, url, website, webloc |

| Image | Extensions |
| --- | --- |
|  | pdf |
|  | arw, bmp, cr2, crw, dcm, dds, dib, dng, erf, gif, heic, heif, ico, jpeg, jpg, nef, orf, png, psb, psd, raw, tga, tif, tiff |
|  | pot, potm, potx |
|  | pbids, pbix |
|  | pps, ppsm, ppsx |
|  | ppt, pptm, pptx, sldx, sldm |
|  | odp, gslides, key |
|  | pub |
|  | epub, gdoc, odt, rtf, wri, pages |
|  | odc, ods, gsheet, numbers, tsv |
|  | dif, diff, readme, out, plist, properties, text, txt |
|  | ai, eps, fig, ind, indd, ps, svg, svgz, wmf, xps, xd, sketch |
|  | 3g2, 3gp, avi, flv, m4v, mkv, mov, mp4, mpeg, mpg, qt, swf, ts, vob, webm, wmv |
|  | vdx, vsd, vsdm, vsdx, vsw, vdw |
|  | vss, vssm, vssx |

| Image | Extensions |
| --- | --- |
|  | vst, vstm, vstx, vsx |
|  | whiteboard, wbtx |
|  | xlc, xls, xlsb, xlsm, xlsx, xlw |
|  | xlt, xltm, xltx |
|  | xaml, xml, xsl |
|  | xsn |
|  | zip |

# Splash Screen



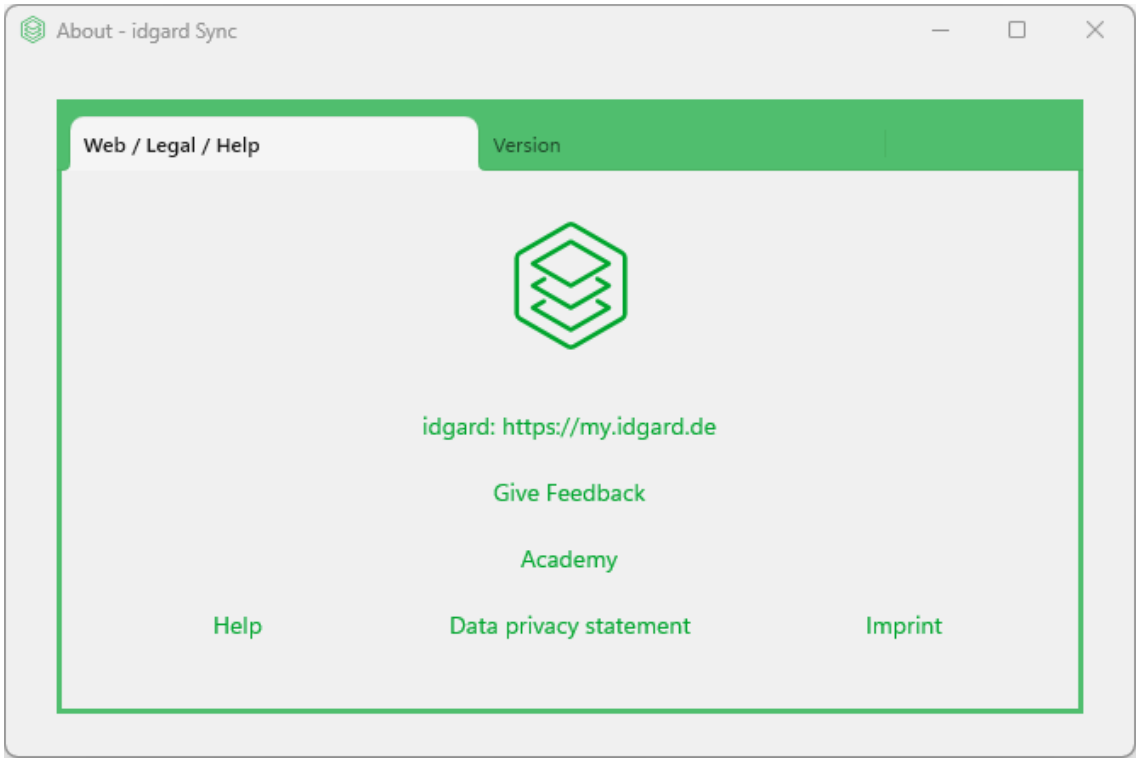

The splash screen appears at application start. It shows the product name and logo.

The splash screen stays visible while the app is loading.

On the splash screen, there is a button `Getting Started.pdf`. When you click on the button the Getting Started PDF will open. You can also press `SPACE`, when the button has the focus and the PDF will open as well.

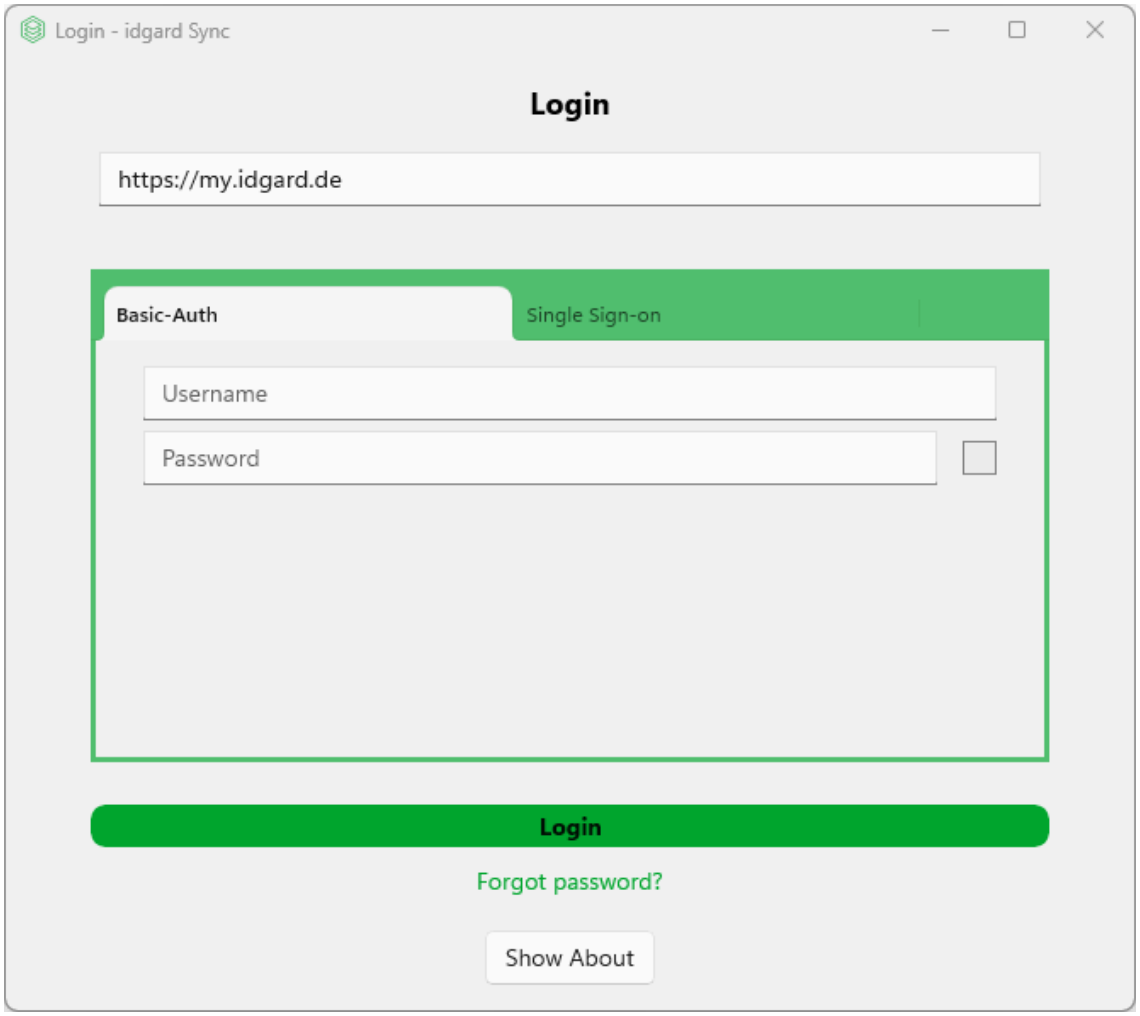
> **NOTE**
> There is no way to re-visit the splash screen, when application is started. But "Getting Started - PDF" can be found in the box sync-root folder.

# About View




The `AboutView - Info, Links and Versions` is a standard view to show version numbers and support links.

# Login View




The `Login Window - User Authentication Interface` is view that provides a comprehensive login interface for the application with support for multiple authentication methods.

> **NOTE**
> The available authentication methods may differ depending on the tenant or **idgard Sync** configuration. This means that for example SSO may not be available for you.

## Authentication Methods Supported

1. **Basic Authentication** - Traditional username/password login
2. **SSO (Single Sign-On)** - Web-based authentication via SSO URL
3. **Multi-Factor Authentication (MFA)** - combined with Basic Authentication (e.g. TOTP or SMS) aka Second Factor Authentication (2FA)

## Layout structure

1. **Header Section** - Server URL configuration
   - Displays application title
   - Default server URL input field, can be changed to use other servers
2. **Authentication** - Tabbed interface for first-factor authentication
   - **Basic Auth Tab**: Username and password fields with password visibility toggle (Alt+F8) and optional 2FA
     - **TOTP Tab**: One-time password input (Authenticator App)
     - **SMS Tab**: SMS code input with resend functionality (Mobile Phone)
     - **Other 2FA methods**: There are possible additional other 2FA method configured by the server
   - **SSO Tab**: SSO URL input with embedded Browser for web-based authentication
3. **Errors** - Shows authentication error messages in red when login fails
4. **Actions**
   - Primary button: `Login`
   - Link: `Forgot password?`
   - Button `Show About` opens the About view

> **NOTE**
> The login window opens at startup whenever you are not signed in. You can also open it by double-clicking the tray icon while signed out.

# Login Error Scenarios

The following error messages may be displayed during login:

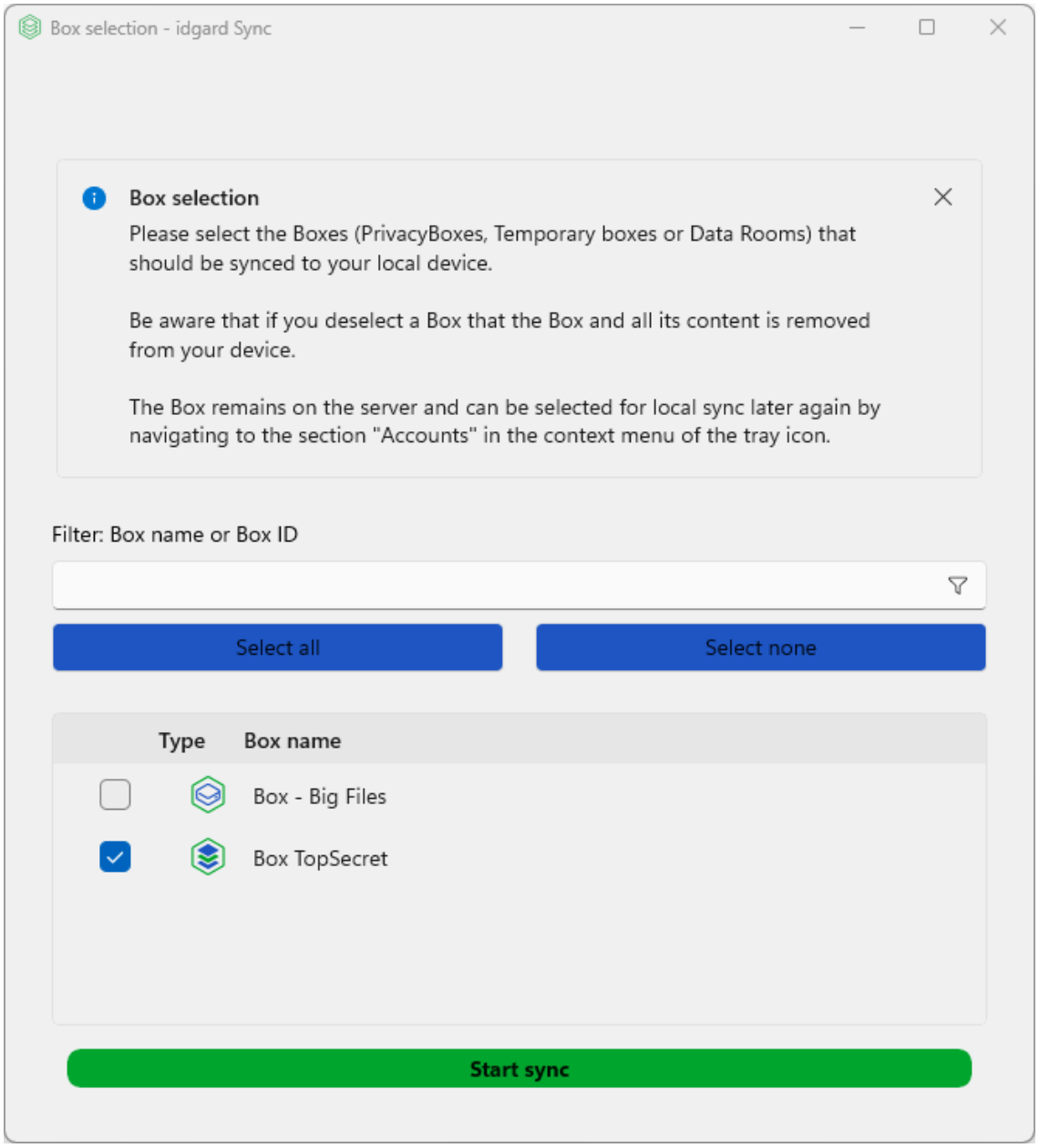
| Error | Description |
|---|---|
| **Invalid server URL** | The entered server URL format is not valid. |
| **Invalid SSO URL** | The entered SSO login URL format is not valid. |
| **Hostname mismatch** | The server URL and the SSO login URL do not point to the same host. |
| **Wrong credentials** | The username or password is incorrect. |
| **User account blocked** | Too many failed login attempts. The account is locked and must be unlocked by an administrator. |
| **Wrong verification code** | The entered 2FA code (TOTP, SMS, LoginCard) is incorrect. |
| **Password change enforced** | The organization requires a password change. The user must go to the website and change their password before logging in. |

| Error | Description |
| --- | --- |
| **TOTP setup required** | The organization enforces TOTP as a second factor, but the user has not set it up yet. The user must go to the website and complete TOTP setup for their account. |
| **SSO user mismatch** | The SSO login returned a different user than expected (re-login scenario). |
| **Unknown API error** | The login failed due to an unexpected server error. |

## Server Version Compatibility

> **IMPORTANT**
>
> The **TOTP setup required** error is returned by server **v2.0.2 and later**. On older server versions (before v2.0.2), the client can still log in even when TOTP setup is configured as mandatory on enterprise level but has not been completed by the user.

# Box Selection View




The `SelectBoxesView - Box Included or Excluded in Synchronization` is a dialog that allows users to select which boxes they want to synchronize with the application. The non-selected ones will be removed locally, but stay on the server.

Enable users to choose specific boxes from their account for local synchronization, providing granular control over what content is synced to their device. Also "hiding" of sensitive or huge boxes can be done by un-select them.

# Key Features

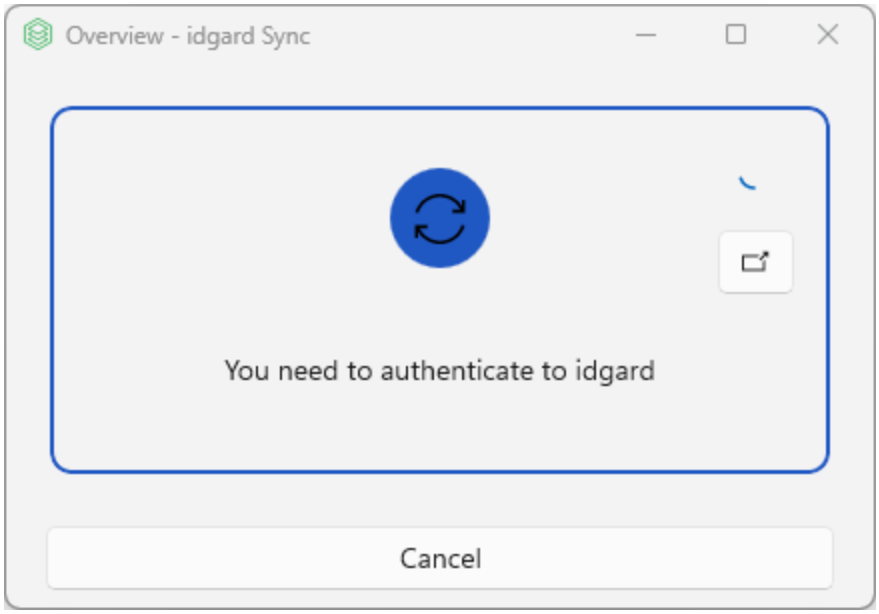
- Shows current account details at the top
- Instruction Banner with title and message explaining how to use the view (can be closed by the user)
- Box filter (by box name, or box id)
- Table View which can be sorted by column, shows the box type and name
- Hover over table row, will show description and id of the box
- Buttons `Select All` und `Select None`
- Bulk edit, select all `Ctrl`+`A`, select none `Ctrl`+`Shift`+`A`
- A selected row can be copied `Ctrl`+`C` to clipboard as CSV with header

# Keyboard Shortcuts

- **Ctrl+A** - Select all boxes
- **Ctrl+Shift+A** - Deselect all boxes
- **Ctrl+C** - Copy to clipboard of focused row
- **Arrow keys** - Navigate table rows
- **Space** - Toggle checkbox on focused row

> ⓘ **NOTE**
> The Box Selector will appear, after the 1st login. It can be re-shown by the tray-icon context menu, right click, click on accounts, open the user-account-menu and select "Show Box List".

# Sync Overview




The `SyncOverviewView - Application Status Dialog` is a compact status window that displays the current synchronization state of the application. It appears in the bottom-right corner of the primary display and will show real time updates.

The AppState is the same as the indicator dot on the TrayIcon.

## Layout Structure

- **Status Border** - Color-coded border that changes based on application state
- **State Symbol** - Icon with dynamic color and symbol (glyph)
- **Progress Ring** - Appears when the application is busy (syncing, uploading, downloading)
- **Activity Button** - Top-right corner button to open the Activity View
- **Status Message** - Text showing current operation or state
- **Action Buttons** - Context-sensitive buttons at the bottom (e.g. Login or Cancel)

## Application States, Colors & Glyphs

The status area shows the current sync state at a glance:

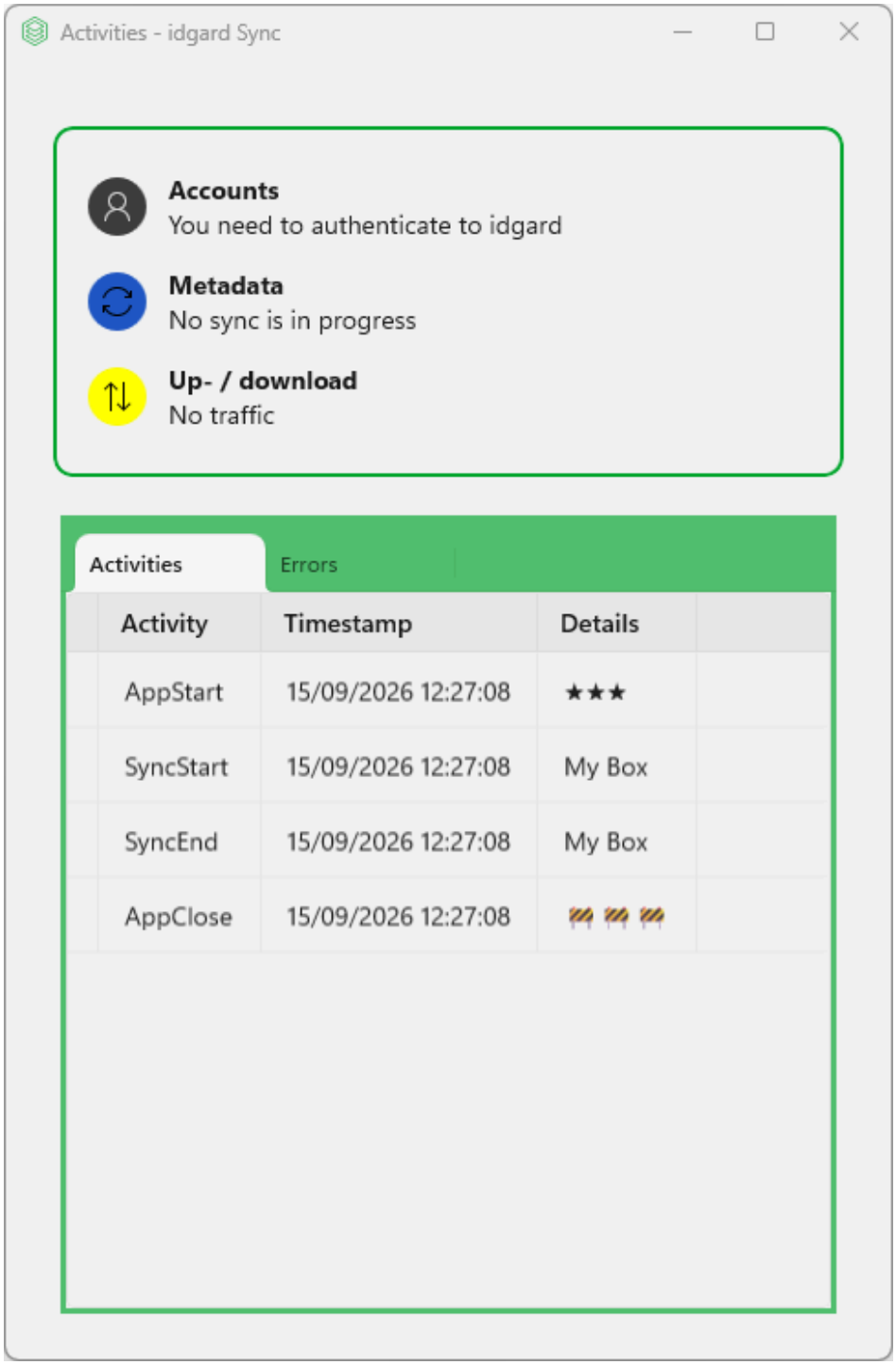
| State | Color | Symbol | Message |
|---|---|---|---|
| **None** | None | | Initial state |
| **NotAuthenticated** | Error color (gray) | | Login required |
| **Synchronizing** | Busy color (blue) | | Currently syncing meta-data |
| **UploadOrDownloadInProgress** | Busy color (yellow) | | Traffic is on going |
| **Success** | Success color (green) | ✓ | Sync completed |
| **Error** | Error color (red) | ✕ | Error description |

## Context-Sensitive Actions

- **No button**: When everything is up to date, no action button is shown.
- **Login button**: When sign-in is required, a login action is shown.
- **Cancel button**: While a sync operation is running, you can cancel it.

> **NOTE**
>
> Single left-click on the tray icon opens `Sync Overview Window`.

# Activities View




The `Activities Window - Activity Monitoring and Error Management` gives you detailed insight into what the app is doing right now and what happened recently.

Use it to monitor sync behavior and quickly identify issues.

# Health Status Panel

- Color-coded border matching the current app state.
- Three status indicators:

1. **Accounts Status**: Shows connection status for your accounts.
2. **Metadata Sync Status**: Shows which box is currently syncing.
3. **Traffic Status**: Shows file counts and transfer progress.

The status area shows the current sync state at a glance:

| State | Color | Symbol | Message |
|---|---|---|---|
| **None** | None | | Initial state |
| **NotAuthenticated** | Error color (gray) |  | Login required |
| **Synchronizing** | Busy color (blue) |  | Currently syncing meta-data |
| **UploadOrDownloadInProgress** | Busy color (yellow) |  | Traffic is on going |
| **Success** | Success color (green) |  | Sync completed |
| **Error** | Error color (red) |  | Error description |

# Tabbed Interface

## Tab 1: Activities

- Read-only list of recent app activities in chronological order.

## Tab 2: Errors

- Read-only list of errors.
- Error entries are clickable so you can open the related folder and resolve the issue.

## Tab 3: Downloads - *Debug Only, Experimental*

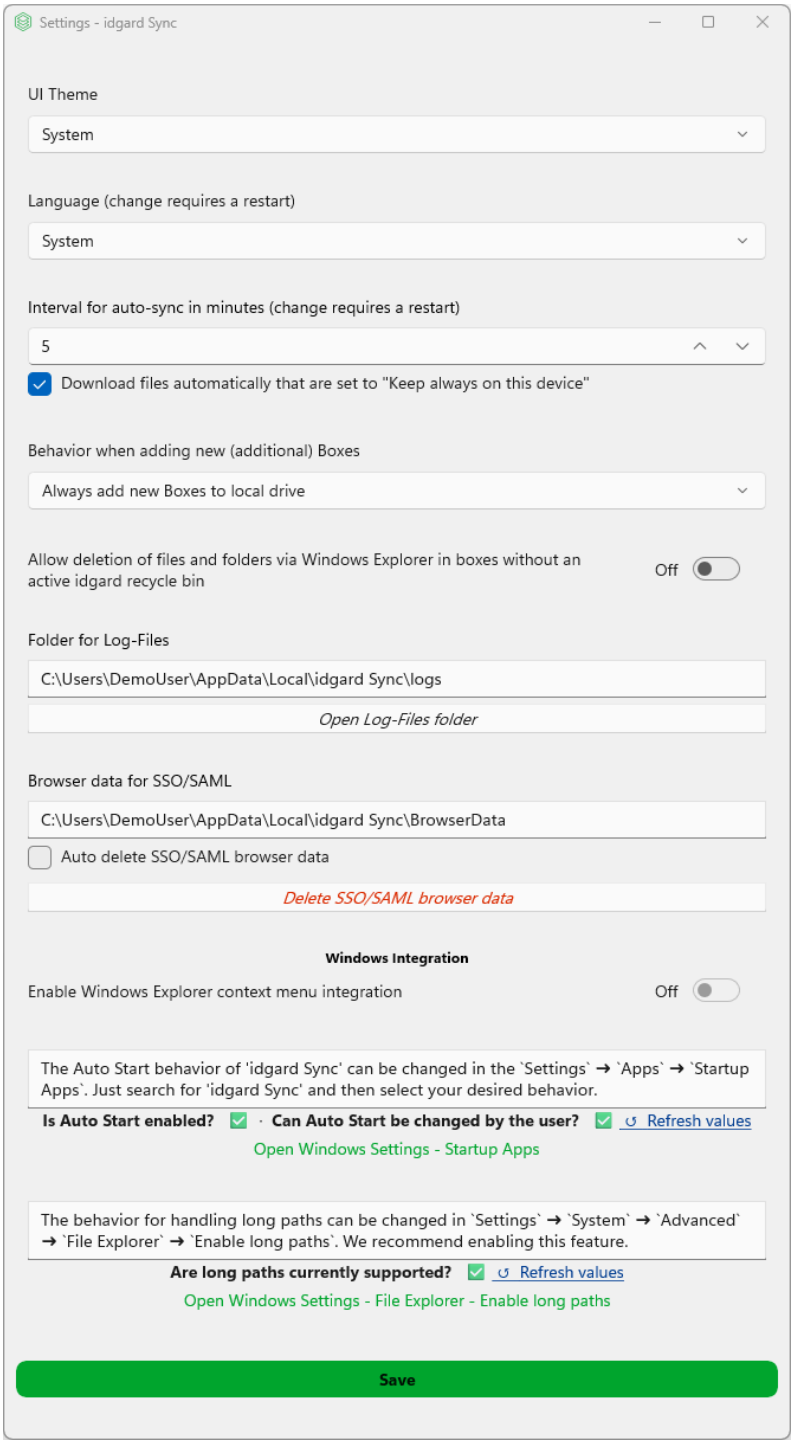
- Shows active and recent download operations

## Tab 4: Uploads - *Debug Only, Experimental*

- Shows active and recent upload operations

> **NOTE**
>
> Open `SyncOverview Window` with a single left-click on the tray icon, then use the activity button to open `Activities Window`.

# Application Settings




Use `AppSettingsView - Application Configuration and Preferences` to personalize how idgard Sync looks and behaves.

You can also access support-related paths such as log files and browser data.

Your settings are saved and applied again the next time you start the app.

# Configuration Options

## Theme Selection

- Options: Light, Dark, Follow System
- Applied *immediately*

## Language Selection

- Options: English, German, Follow System
- Requires *app restart*

## Auto-Sync Interval

- Sets how often the app automatically synchronizes with the server
- Default: 5 minutes
- Range: 1-720 minutes (12 hours maximum)
- Controls: `+`/`-` (1 minute), `PgUp`/`PgDown` (15 minutes)
- Requires *app restart*

## Automatic Downloads

- Enable or disable automatic file downloads
- Requires *app restart*

This controls whether files marked as "Keep always" are downloaded automatically. In large shared boxes, this can generate higher network traffic and local storage usage.

## Behavior When Adding New Boxes

- Choose how newly available boxes are handled after the initial box selection
- Option 1, `Always add new boxes to the local drive`: Automatically adds each new box the user becomes a member of
- Option 2, `Never add new boxes to the local drive - always select via the context menu`: Does not add new boxes automatically; add them manually from the context menu when needed
- Option 3, `Show box selection after each login - select boxes for local synchronization manually`: Does not add new boxes automatically, but shows the box selection after each login so new boxes can be reviewed and added manually

## Allow Deletion Without Recycle Bin

By default, deleting a file or folder in Windows Explorer is only permitted when the box has an active idgard Recycle Bin. This restriction exists to protect users from accidentally deleting data without any way to recover it. If the Recycle Bin is not active for a box, the delete operation is blocked.

Enable the **Allow deletion of files and folders via Windows Explorer in boxes without an active idgard recycle bin** toggle to remove this restriction. Items can then be deleted from any box, regardless of its Recycle Bin state.

> ⊗ **CAUTION**
>
> It is **not recommended** to enable this setting. Files and folders deleted from boxes without an active idgard Recycle Bin are **permanently deleted** and cannot be recovered.

## Log Files Management

- Shows the log folder path: `Folder for Log-Files`
- `Open Folder` opens the log directory in File Explorer

## Browser Data Management

- Shows the browser cache/data folder path
- **Auto-delete**: Clears browser cache on app exit (used for items such as SSO session cookies); requires *app restart*
- `Delete Browser Data`: Clears browser cache immediately

## Windows Integration

This section groups settings that control how idgard Sync integrates with the Windows operating system.

### Context Menu

- Toggle: `Enable Windows Explorer context menu integration`
- When enabled, a idgard Sync entry appears in the Windows Explorer right-click context menu for items inside the sync root folder, providing quick actions such as opening the item in the web frontend.

### Auto-Start Configuration

- Displays the current AutoStart state (✅ enabled / ❌ disabled) and whether the user is allowed to change it
- Use the ↺ refresh button to re-read the current values without reopening the window
- The link opens the Startup Apps page in Windows Settings (`Settings` → `Apps` → `Startup`)

### Long Path Configuration

- Displays the current long path support state (✅ enabled / ❌ disabled)
- Use the ↺ refresh button to re-read the current value without reopening the window
- The link opens the File Explorer page in Windows Settings (`Settings` → `System` → `Advanced` → `File Explorer`)
- Enable the `Enable long paths` toggle to allow file paths longer than 260 characters (MAX_PATH)
- Requires the system-wide Group Policy `LongPathsEnabled` to be set in `HKLM\SYSTEM\CurrentControlSet\Control\FileSystem`

When long paths are enabled, idgard Sync can sync and manage files with paths longer than 260 characters. Files are downloaded correctly in the background, and PowerShell or other long-path-aware applications can copy and access them without issues.

> ⓘ **NOTE**
> Windows Explorer can navigate long-path folders and open files that are already fully downloaded. It cannot, however, open cloud-only files on demand, create new items, or rename existing items when the resulting path would exceed 260 characters — these are Windows Explorer limitations that apply regardless of this setting.

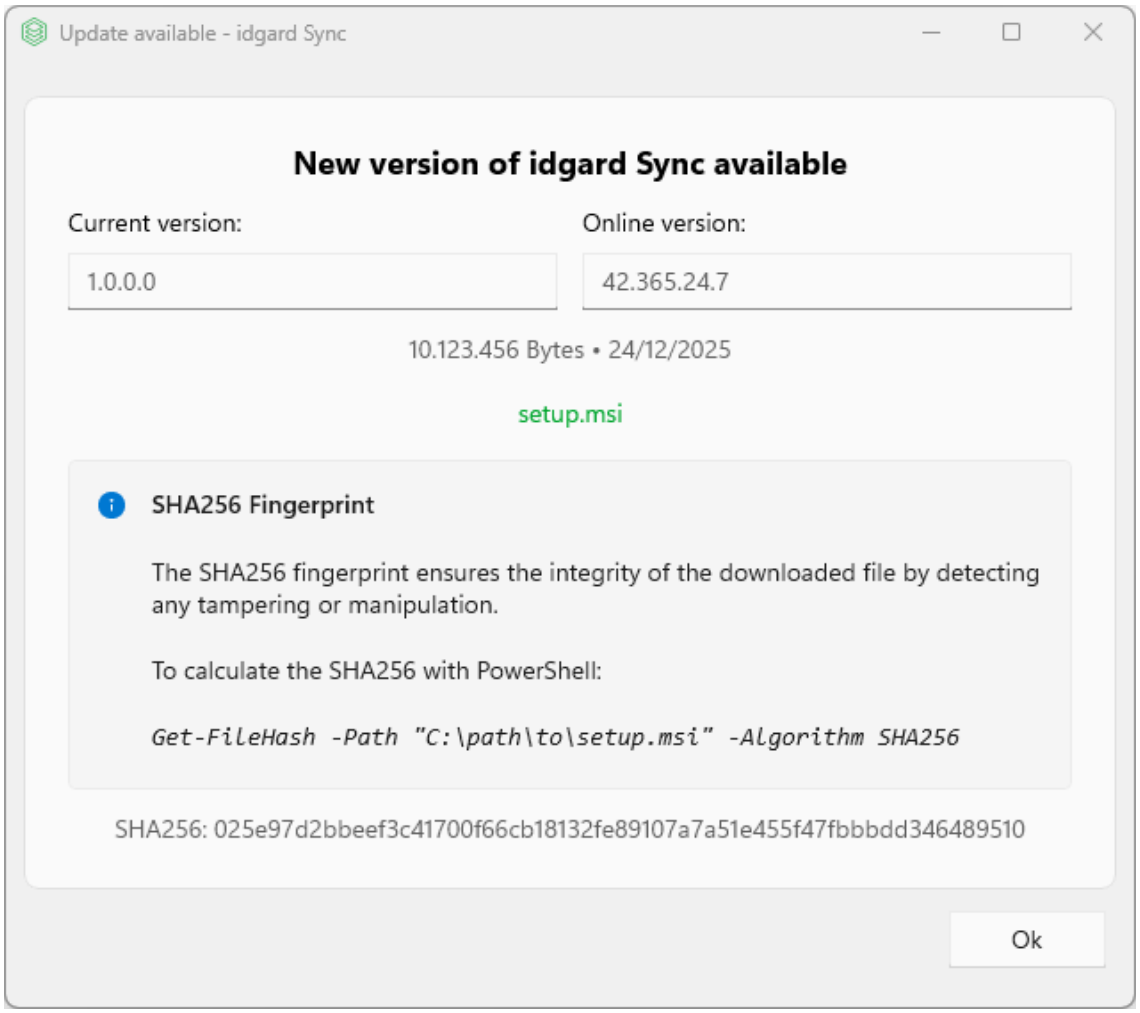
> **NOTE**
>
> This setting requires administrator rights and applies system-wide. It is recommended to enable it for best compatibility with deeply nested folder structures.

## Proxy Configuration

- Web proxy functionality (if the defaults from Windows does not work)
- Proxy server address, can be an URL or an IP
- Proxy server port, any number, e.g. 8080

> **NOTE**
>
> Right-click the tray icon and choose **App Settings** to open this window.

# New Version Window




The **New version of idgard Sync available** window provides information that a new version of the application is available. There is a FIngerprint of the file, to verify integrity after downloading. On the Window there is also the download link available.

> **NOTE**
> The New Version window opens at startup, if you are online and a new version is available.

# System Requirements

The following requirements must be met to install and run idgard Sync.

## Operating System

| Requirement | Minimum |
| --- | --- |
| OS | Windows 11 (64-bit) |

> ⊗ **IMPORTANT**
>
> **Windows 10** is **not** officially supported. The application may run on Windows 10 22H2 (Build 19045) or later — the underlying Windows SDK targets Build 19041 (20H2), which covers the same API surface shared by 20H2, 21H1, 21H2, and 22H2. However, feature gaps and stability issues are possible and will not be addressed.

## Runtime Dependencies

The installer automatically downloads and installs any missing runtime components.

| Component | Version |
| --- | --- |
| .NET Desktop Runtime | 10.0 (x64) |
| Windows App Runtime | 2.5.1 (x64) |

> ⓘ **NOTE**
>
> Both runtime components are bundled with the exe-installer and will be set up automatically if not already present on the system. They are not included in the MSI setup and must be installed separately beforehand.

# Support Request

If you need assistance with idgard Sync, please include the following information in your request:

- Product version
- Windows version
- A short description of the issue
- The steps to reproduce the issue
- Relevant screenshots, if available
- Relevant log files, if available

You can find the log file location in How to access the log-files?.

# idgard Sync Features

## Installation and Setup

- Install idgard Sync with the provided MSI installer.
- Launch idgard Sync automatically when Windows starts.
- Open idgard Sync at any time from the system tray.
- Open the idgard drive in Windows Explorer.

## Sign-In and Access

- Sign in with your idgard username and password.
- Use Single Sign-On (SSO) if it is configured for your organization.
- Complete sign-in with supported two-factor authentication methods TOTP, SMS and LoginCard.

## Box Selection

- Choose which boxes are synchronized to your device.
- Show or hide boxes locally without changing the content stored on the server.
- Reopen the box selection later from the tray menu.

## Working with Files

- Access your boxes in the idgard drive in Windows Explorer.
- Keep selected files and folders available on your device.
- Free up local disk space for content that you do not need offline.
- Download cloud files directly when you open them.
- Add new files and create new folders inside a box directly in Windows Explorer.
- Rename files and folders in Windows Explorer.
- Move files and folders to a different location within the same box.
- Delete files and folders in Windows Explorer.
- Open files, folders, and boxes in the idgard web frontend directly from the Windows Explorer right-click menu.

## Synchronization

- Synchronize cloud changes to your local idgard drive.
- Upload supported local changes to the cloud.
- Receive automatic sync updates at regular intervals.
- Automatically update boxes when new server activity is detected.
- Start a sync manually when needed.
- Cancel an active sync operation.

## App Overview

- Open the sync overview from the tray icon.
- See the current sync, upload, and download status at a glance.
- Open a detailed activity view for recent actions and errors.

## Settings and Support

- Change the theme and language of the application.
- Configure the sync interval and automatic download behavior.

- Open the log folder and clear stored browser data.
- Configure proxy settings if required.
- Configure whether "Open in idgard" is available in the Windows Explorer right-click menu.
- Access account actions such as sign-out, account removal, and box selection.
- Check for available app updates and download the latest installer.
- Open the About view for version and support information.

## Reporting and Logging

- Generate CSV reports with idgard IDs and their corresponding item names.
- Access log files created by idgard Sync.

# Known Limitations

The following limitations are currently known for idgard Sync:

- Moving files in Windows Explorer is only supported within the same box. Files cannot be moved locally to another box or outside the idgard drive. In these cases, they can only be copied.
- ERM-protected Data Rooms are not supported. They may appear in the list, but idgard Sync cannot open or sync their content.
- View-only PDF documents cannot be opened in idgard Sync.
- Users with view permission but without upload permission can only read content locally. If they edit files locally, the affected box will enter a blocking state and further changes may no longer sync.
- Some actions performed while idgard Sync is not running are not detected correctly. This can affect changing, deleting, moving, or renaming folders and files and may cause problems during the next sync.
- Uploads for users who do not have read permission are blocked.
- User data is only cleaned up during uninstallation if the logged-on user uninstalls the application for themselves. When uninstalling silently or as an administrator who is not the idgard Sync user, user-specific data — including the sync root, registry entries, the idgard Sync drive, and the context menu extension — is not removed and must be cleaned up manually or by running a dedicated cleanup script.
- When uninstalling interactively, the application data folder may not be fully removed in some cases, especially when a large number of files is involved. After uninstalling, check that the idgard Sync folder under `%LOCALAPPDATA%` no longer exists. If it does, delete it manually.
- During an upgrade or uninstall, idgard Sync cannot always be closed automatically. Always close the application before starting an upgrade or uninstall. Otherwise, the process may continue running in Task Manager even though the tray icon is no longer visible, and must be terminated manually from there.

# Recovering From Error Situations

This page describes how to recover from errors that may occur during installation, usage, or removal of the application.

## Missing prerequisites

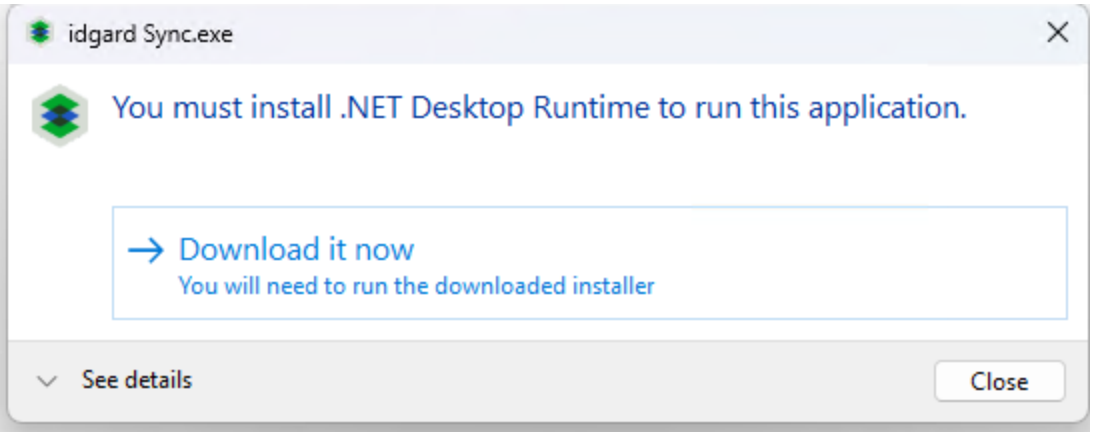
idgard Sync requires the following components to be installed on your device. If one of them is missing, the application will not start.

- **.NET Desktop Runtime** — install the version that matches the application version you are using
- **Windows App SDK** — install the version that matches the application version you are using

If you are unsure which version is required, check the release notes of idgard Sync or contact your IT administrator.

## Missing .NET Desktop Runtime

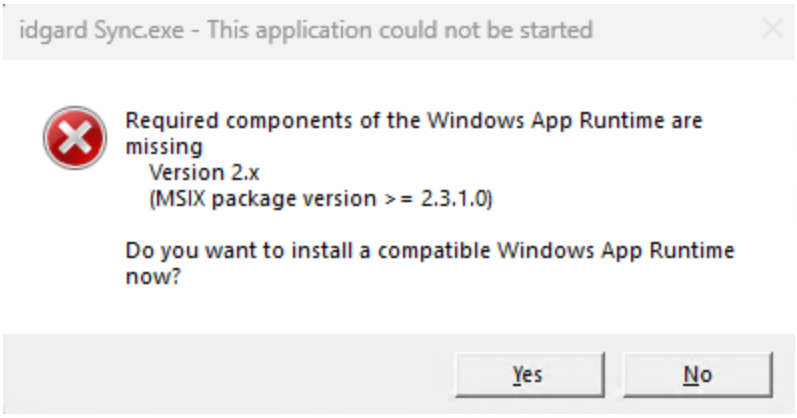
When the .NET Desktop Runtime is missing, idgard Sync will display the following dialog. Confirm the dialog to open the download page, then install the component and restart the application.




**.NET Desktop Runtime missing dialog**

## Missing Windows App SDK

When the Windows App SDK is missing, idgard Sync will display the following dialog. Confirm the dialog to open the download page, then install the component and restart the application.




**Windows App SDK missing dialog**

> **NOTE**
> If the download page does not offer the exact version required, check the error message in the dialog for the version number, then search for that specific version on the Windows App SDK download page and download it manually. The download page might only show the latest version — then you need to browse the archive to find the correct version required. The minor version must match exactly — for example, version 2.4 does not satisfy a requirement for 2.3. Install the required version alongside any existing version, as multiple versions can run in parallel on the same device.

# Synchronization errors

> **WARNING**
> Some of the recovery actions described below can remove local content that has not yet been synchronized to the idgard server. Before you continue, copy any important local data to a location outside the idgard drive.

# Check whether a local file or folder is causing the error

If the error is caused by a local file or folder, you can find the relevant information in the error details in the Activities view.

In many cases, the issue can be resolved by moving the affected file or folder out of the idgard drive to another folder on your device. If the cause was only temporary, you can try again later to apply you desired change.

To check whether the issue is related to missing permissions, try to perform the same action, for example uploading the file, in the web application.

# Start a full sync to recover from missed changes

If the local state no longer matches the server, starting a full sync can resolve the inconsistency without removing any boxes or accounts.

The partial sync is optimized for performance and only processes recent changes, which means it can miss updates in certain situations. A full sync re-evaluates every file and folder across all locally selected boxes and can detect changes that were missed by the regular automatic sync, for example:

- A permission change on the server affected the folder structure, but the partial sync did not detect the resulting tree change.
- A file was open in another application during an automatic sync cycle, which prevented it from being updated. The partial sync will not re-attempt this in a subsequent run.

To start a full sync, right-click the tray icon and select `Sync` -> `Start full sync`. A confirmation dialog will appear before the sync begins.

Before confirming, resolve any existing sync conflicts indicated by a red sync state, and save and close any open files located under the idgard drive. The process may take considerable time depending on the number of files and folders.

# Temporarily remove the affected box from sync

If the error is related to a specific box, you can temporarily remove that box from local synchronization and add it again later.

You can do this from the tray context menu: Accounts -> idgard Account -> your configured account -> Select sync boxes

# Remove and add the account again

If the problem persists, you can remove the complete idgard account and configure it again afterward.

You can do this from the tray context menu: Accounts -> idgard Account -> Remove user account

# Reinstall the application

If you have the required permissions on your device, you can also try uninstalling and reinstalling idgard Sync.

# What to expect afterward

Depending on the amount of data involved, adding boxes again may take some time, especially if they contain many items or large files that need to be downloaded again.

When you add a box again, local configuration for that box may be lost, for example settings such as keeping folders or documents always available offline.