

Brainloop Secure Connector for Microsoft Outlook Version 4.5

User Guide



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1 Welcome to the Brainloop Secure Connector for Microsoft Outlook

The Brainloop Secure Connector is a client-based software program that seamlessly integrates Microsoft Outlook with the Brainloop Secure Dataroom.

The service provided by the Brainloop Secure Connector for Microsoft Outlook goes far beyond a very comfortable way of sending e-mails and e-mail attachments securely. It allows the user to navigate in, upload to and download from a Dataroom.

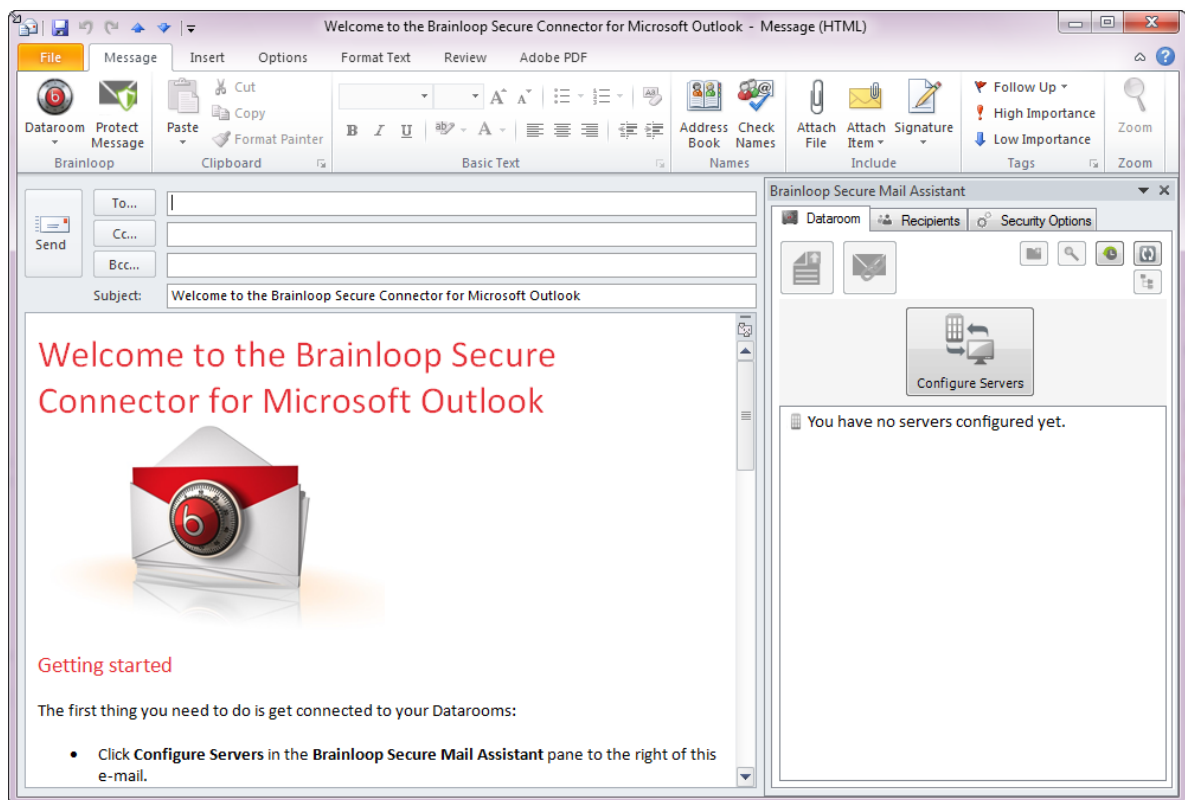
2 Using the Brainloop Secure Connector for Microsoft Outlook for the First Time

2.1 Getting Started

Once the Brainloop Secure Connector for Microsoft Outlook has been installed on your computer, the application is available right within your Microsoft Outlook inbox. When you open Microsoft Outlook after the first installation of the Brainloop Secure Connector, a **Welcome to** e-mail is displayed which leads you through the first configuration steps required, and through a test scenario for sending your first document link and uploading a local document into your Dataroom.

After the **Welcome to** e-mail the following message may be displayed depending on your computer's configuration settings: *"To disable the security warning that is shown when you try to open an attachment click "Yes". Click "No" if you want the message to be shown each time you open an attachment."* If you want to permanently disable the Outlook attachment security warning, answer this message with **Yes**.

To get familiar with the brand-new Brainloop Secure Connector, and to get some experience in sending document links and uploading local documents to your Datarooms, follow the instructions in the **Welcome to** e-mail.

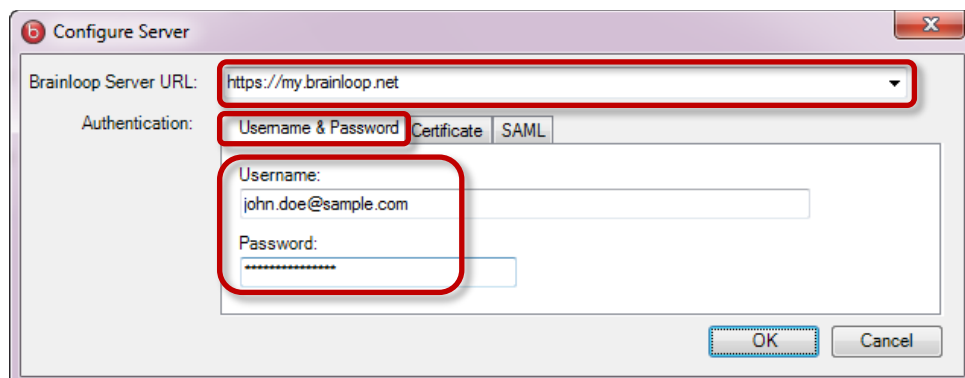


To configure one or more Dataroom servers, proceed to the next chapter.

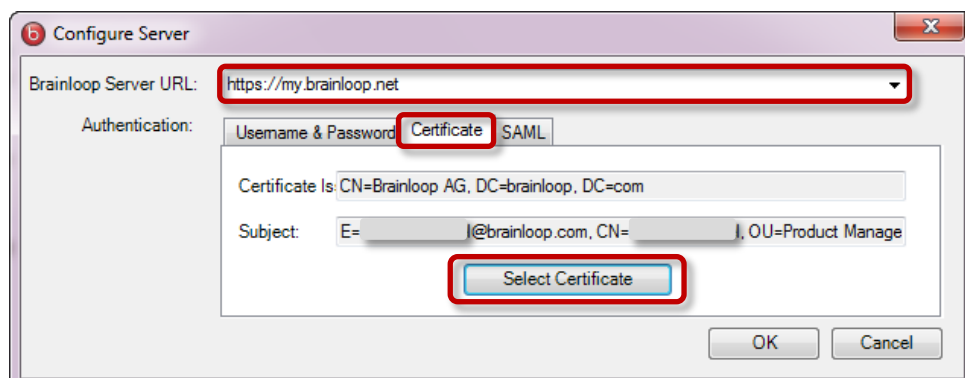
2.2 Configure Dataroom Servers

After the installation of the Brainloop Secure Connector, you need to configure the connections to the servers on which your Datarooms are installed.

1. In the **Welcome to** e-mail, click the **Configure Servers** button.
2. The **Configure Servers** dialog window is displayed.
3. Open the **Brainloop Server URL** drop-down list, and select a Dataroom server, or type the server's URL into the field. **Note:** The most common Dataroom servers (.NET, .US and .CH) can be selected from the list; other URLs must be entered manually into the field.
 - a. To **authenticate with your e-mail address and password**, proceed as follows:
 - In the **Username & Password** tab, enter your **Username** (your **e-mail address** you defined during your first registration to the Dataroom server) and your **Password**.

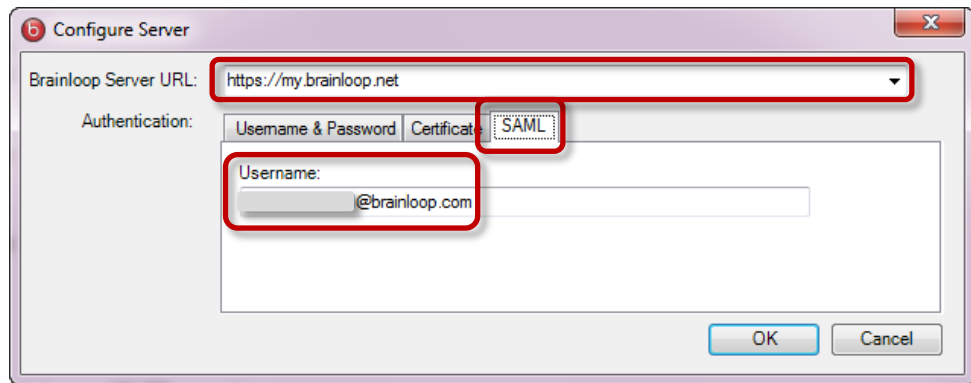


- b. To **authenticate with your Dataroom certificate**, proceed as follows:
 - Open the **Certificate** tab. Click the **Select Certificate** button, and select the appropriate certificate from the list. Certificate details are then shown in the respective fields.



c. To **authenticate with your SAML login**, proceed as follows:

- Open the **SAML** tab. Enter your **Username** (your **e-mail address** you defined during your first registration to the Dataroom server).



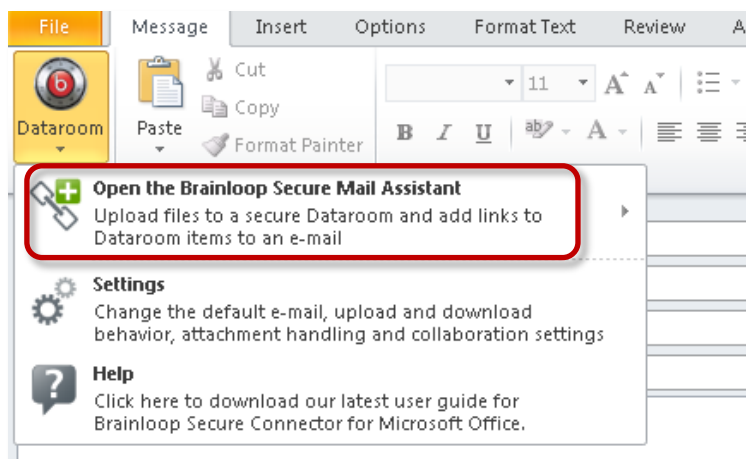
4. Click **OK** to save your settings.
5. Once the connection to the given Dataroom server has been established a corresponding message is displayed.
6. Click **OK** to confirm this message.
7. The **Change Settings** dialog window is displayed with the **Servers** pane open by default.
8. You can now add further Dataroom servers.
9. If this is not required, click **OK** to close this dialog window.
10. Back in the **Welcome** e-mail, you see a list of your Datarooms in the **Browse** tab.

3 The Brainloop Secure Mail Assistant Pane and its Functions

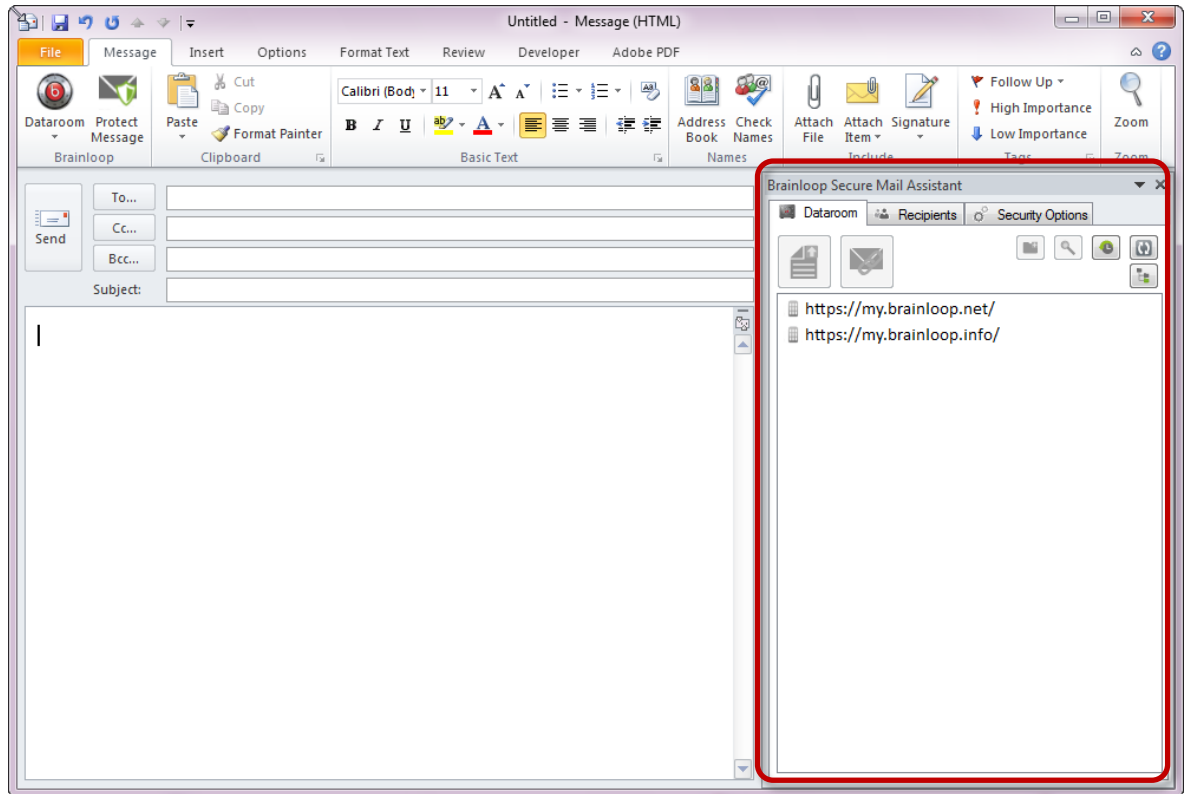
3.1 Open the Brainloop Secure Mail Assistant Pane in an E-Mail

To open the Brainloop Secure Mail Assistant pane to the right of an e-mail proceed as follows:

1. Open Microsoft Outlook.
2. Click the **New E-Mail** button.
3. In the e-mail, click the **Dataroom** button and select **Open the Brainloop Secure Mail Assistant**.



4. The pane is then shown to the right of the e-mail.



i Tip: If you activate the “Always show the Brainloop Secure Mail Assistant when creating a new e mail” option in the Settings, the Brainloop Secure Mail Assistant is always displayed when you create a new e-mail. See [“Always show the Brainloop Secure Mail Assistant when creating a new e mail”](#), page 28.

3.2 Tabs available in the Brainloop Secure Mail Assistant Pane

The Brainloop Secure Mail Assistant is divided into the three following tabs.

- **The Dataroom tab:**

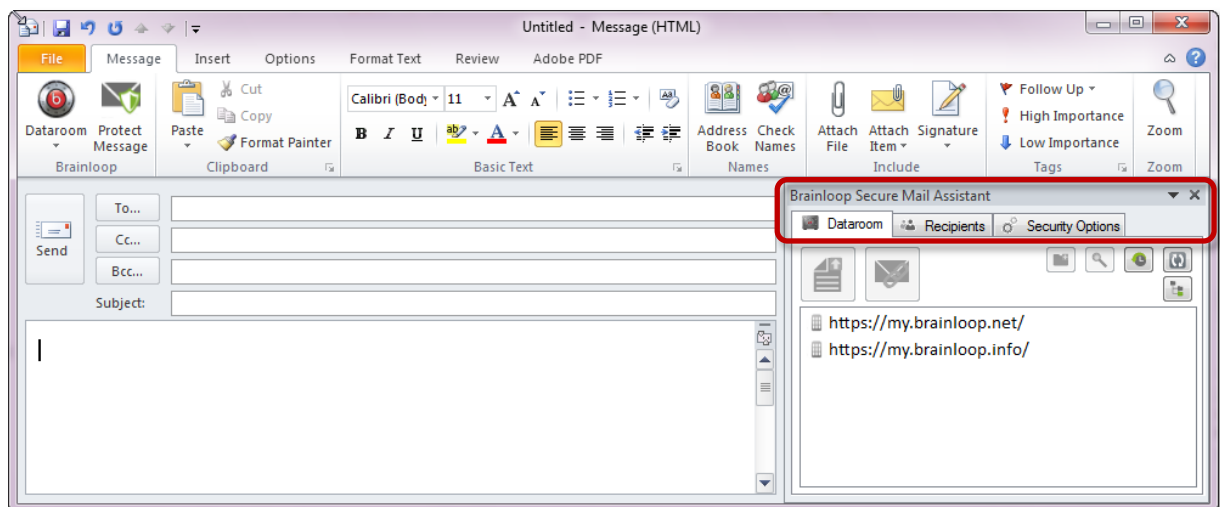
The Dataroom tab is used to navigate your Datarooms and Dataroom folders, and to select documents for sending as secure links. See [Functions in the Dataroom Tab](#), pages 11ff.

- **The Recipients tab:**

The Recipients tab is used to view the Dataroom members of a given Datarooms who can then be added to the e-mails recipients via drag and drop. See [Functions in the Recipients Tab](#), page 20.

- **The Security Options tab:**

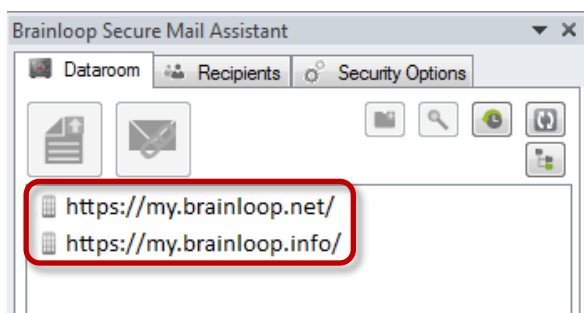
The Security Options tab can be used to verify and – if applicable – change the security options for sending a document as a secure link. See [Functions in the Security Options Tab](#), pages 22ff.




3.2.1 Functions in the Dataroom Tab

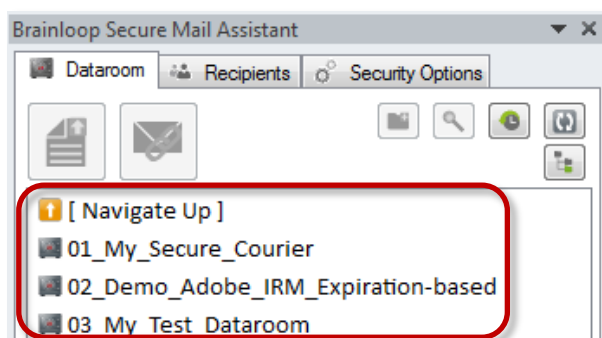
3.2.1.1 Navigate Datarooms and Their Contents

The **Dataroom** tab shows different Datarooms, Dataroom folders, or contents of Dataroom folders. It is used to navigate a Dataroom to select a document that is to be sent as a secure link, for example. At the top level of the Dataroom tab, the **Dataroom servers** are shown.



i **Note:** The list of files in the Dataroom view is cached for seven days. To refresh the current Dataroom view in the Brainloop Secure Connector and to remove all items from the local cache, click .


Double-click a server URL to display the Datarooms installed on that Dataroom server.




Double-click a Dataroom to show its folders. Double-click a folder to show its contents. To jump back to the previous level, double-click **Navigate Up**.

i **Tip:** You can also navigate your Datarooms and their contents by clicking  in the top right corner of the Dataroom tab.


3.2.1.2 Upload a Local Document to a Dataroom

To upload a local document to one of your Datarooms, select the desired Dataroom folder and click . For more details, see chapter [Send Local Documents and Upload them into a Brainloop Dataroom](#), page 31.


3.2.1.3 Send a Secure Link to a Dataroom Item

To insert a secure document link in your e-mail, select the desired document from your Dataroom folder and click . For more details, see chapter [Send Documents Securely Using the Brainloop Secure Connector](#), pages 29ff.


3.2.1.4 Create a new Folder in a Dataroom

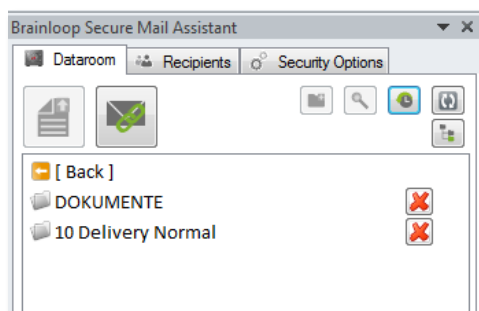
To create a new Dataroom folder directly from within the Secure Connector click . Enter the name of the folder into the **Name** field. As an option, you can enter a folder description into the **Description** field. Click **OK** to save the new folder.


3.2.1.5 Search a Dataroom for a specific Item

To search a Dataroom for a specific item, e.g. a document, click  and enter your keyword. Click **Go** to start the search.


3.2.1.6 View Recently Opened Folders

To navigate quickly to your last opened folders, click . Your last opened Dataroom folders are shown in a list.



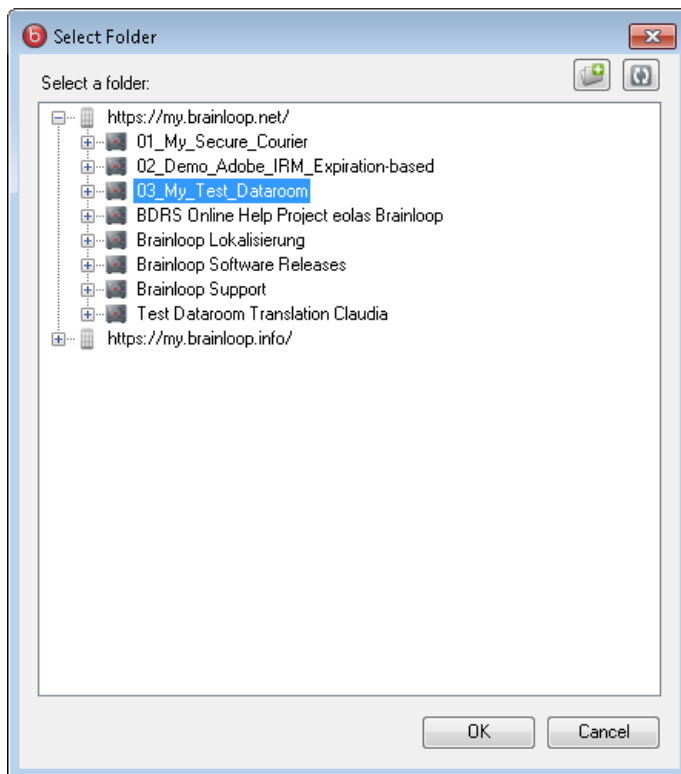
To delete a folder from that list click . This will not delete the folder from the Dataroom.

3.2.1.7 Refresh Dataroom Contents

Since the local cache is saved for seven days, we recommend you refresh the Dataroom view on a regular basis. To refresh the current Dataroom view in the Brainloop Secure Connector and to remove all items from the local cache, click .

3.2.1.8 Open the Current Folder in Tree View

To navigate a Dataroom, or a Dataroom folder in tree view, click .



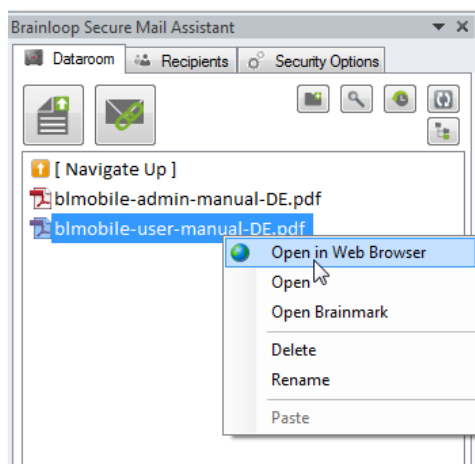
Navigate the tree view by clicking the name of a Dataroom or Dataroom folder.

Click **OK** to return to the Brainloop Secure Mail Assistant pane which shows the selected folder in the **Dataroom** tab.

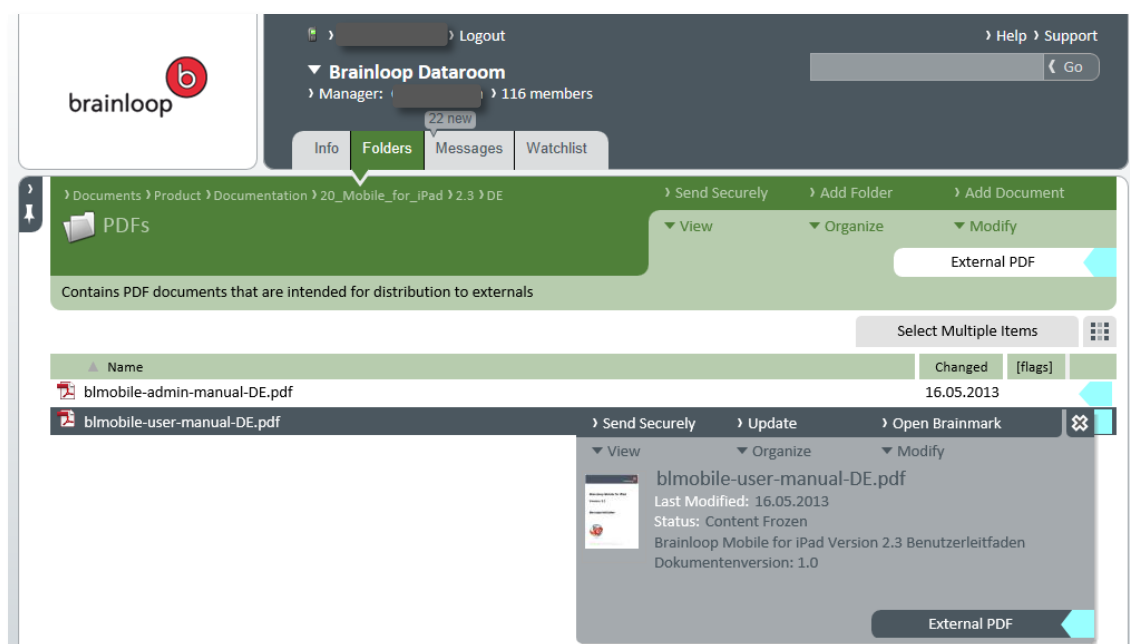
3.2.1.9 Open a Document in the Web Browser

To open a document in the Brainloop Secure Dataroom Service via your web browser, proceed as follows:

1. Right-click a document in the list and select **Open in Web Browser**.



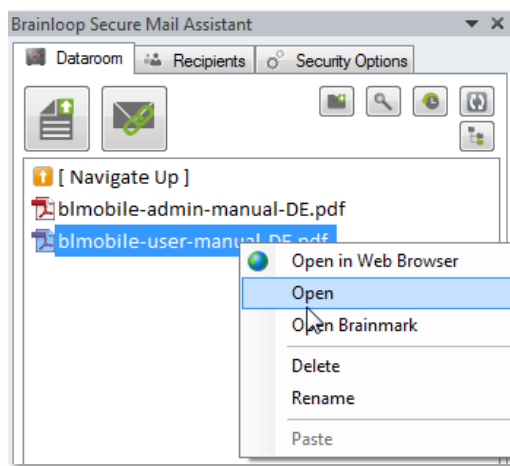
2. You are directed to the login page of the Brainloop Secure Dataroom Service.
3. Enter your username and password, and click **Login**.
4. If the Dataroom is PIN-protected, enter the PIN you received by e-mail or by SMS and click **OK**.
5. You are directed to the document with its **Details** window open.



3.2.1.10 Open a Document in its Original Format

To open a document in its original format directly through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

1. Right-click a document in the list and select **Open**.

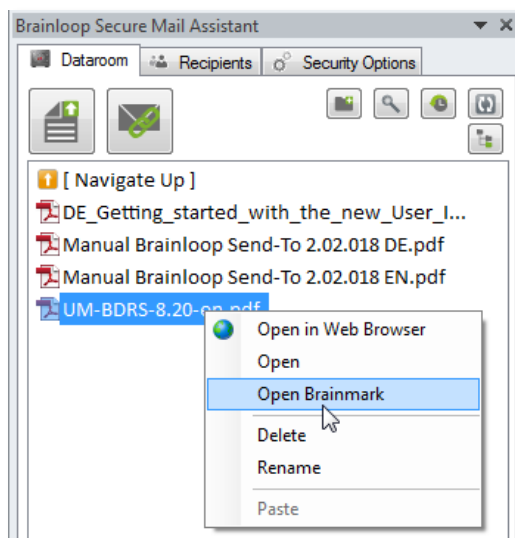


2. The document is opened directly in the corresponding application.
3. If in the General Settings, the **Ask me where to save each file before downloading** option is enabled, you must save the document to a local path first. Once you have clicked **Save**, the document is opened in the corresponding application.

3.2.1.11 Open a Document in Brainmark Format

To open a document in Brainmark format directly through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

1. Right-click a document in the list and select **Open Brainmark**.

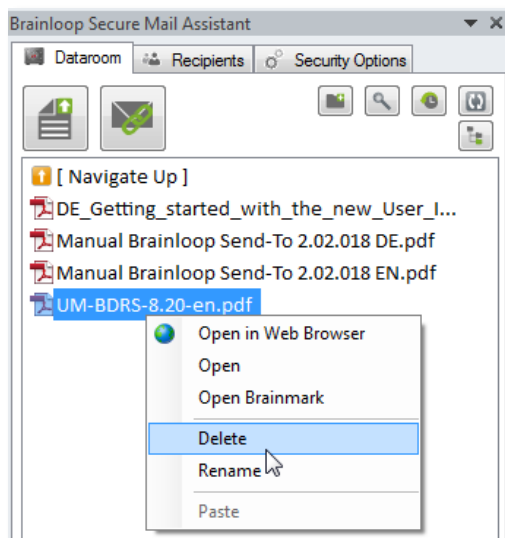


2. The document is opened directly in the corresponding application.
3. If in the General Settings, the **Ask me where to save each file before downloading** option is enabled, you must save the document to a local path first. Once you have clicked **Save**, the Brainmark document is opened in the corresponding application.

3.2.1.12 Delete a Document from a Dataroom

To delete a document from a Dataroom directly through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

1. Right-click a document in the list and select **Delete**.

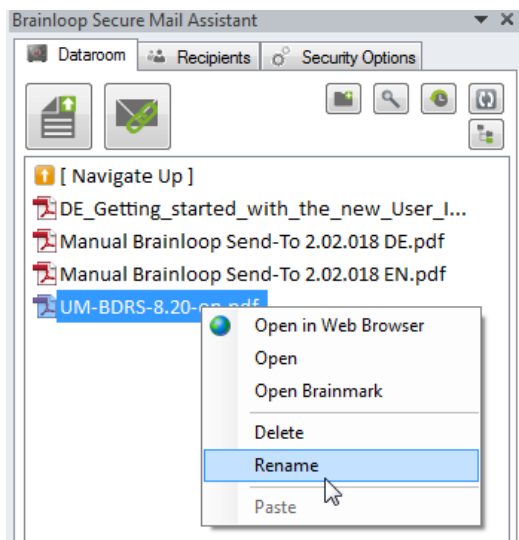


2. If you are sure that you want to delete the selected document from your Dataroom, answer the security message with **Yes**.

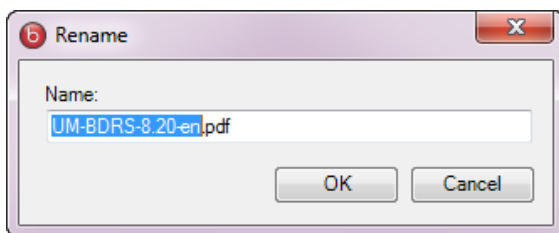
3.2.1.13 Rename a Dataroom Document

To rename a document in a Dataroom directly through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

1. Right-click a document in the list and select **Rename**.



2. In the **Rename** dialog window overwrite the filename with a new one.

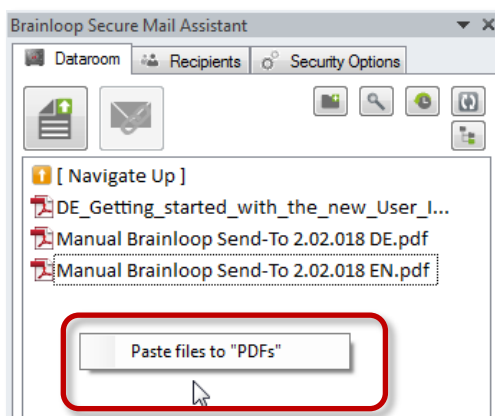


3. Click **OK** to save.

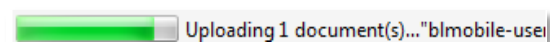
3.2.1.14 Upload a Document from the Clipboard into a Dataroom

To upload a document from your clipboard into a Dataroom directly through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

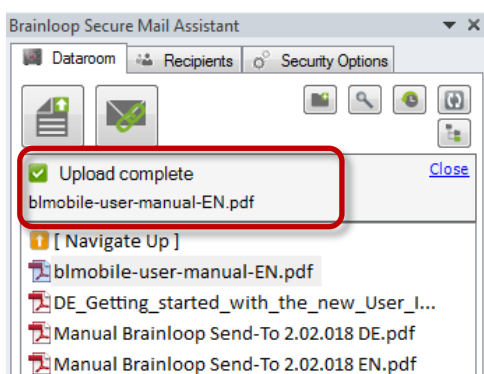
1. Copy the given document to your clipboard, e.g. by right-clicking the document in your Windows Explorer and selecting **Copy**, or by selecting the document and pressing **Ctrl+C**.
2. Open an e-mail in Microsoft Outlook and open the Brainloop Secure Mail Assistant pane.
3. Navigate to the Dataroom folder into which you want to upload that document.
4. Right-click into the list of documents and select **Paste files to “name of folder”**.



5. The file is now uploaded into the given Dataroom folder. The upload progress is shown in a progress bar the bottom of the pane.



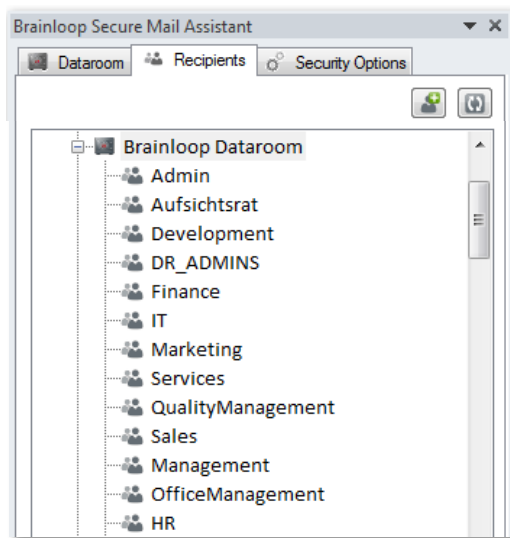
6. Once the upload is complete, a corresponding message is shown on top of the document list.



3.2.2 Functions in the Recipients Tab

3.2.2.1 Add Dataroom User Groups or Dataroom Users to an E-Mail

The **Recipients** tab shows the user groups and users that belong to the selected Dataroom.



Double-click a user group or an individual Dataroom user in that list to add them to the e-mail's **To** and **Cc** fields, or drag and drop it to the **To** and **Cc** fields.




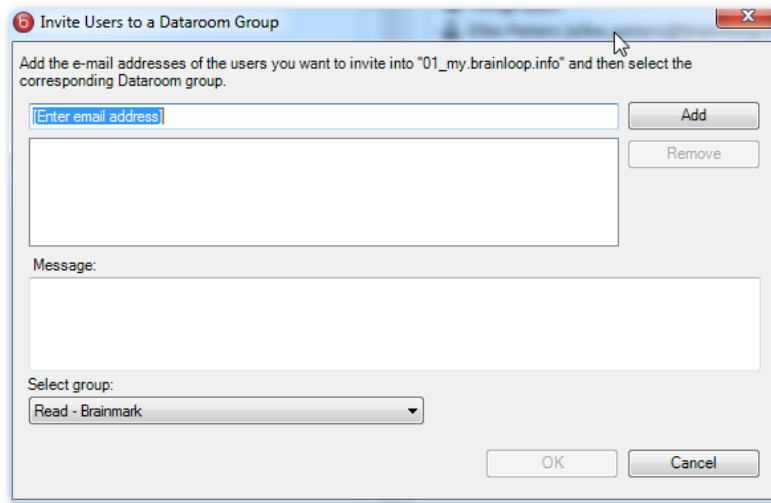
Please note that you cannot send Bcc e-mails with the Brainloop Secure Connector.

3.2.2.2 Invite New Users to the Dataroom

Depending on your permissions, you can invite new users to a group in the selected Dataroom.




Click the  button and enter the e-mail addresses of the users you want to invite, enter a message to the new users, and select the correct Dataroom group. Click **OK** to send the invitation.



Please note that you can only invite new users to a Dataroom group, if you have the necessary permissions for the Dataroom.

3.2.2.3 Refresh List of Dataroom Groups and Users

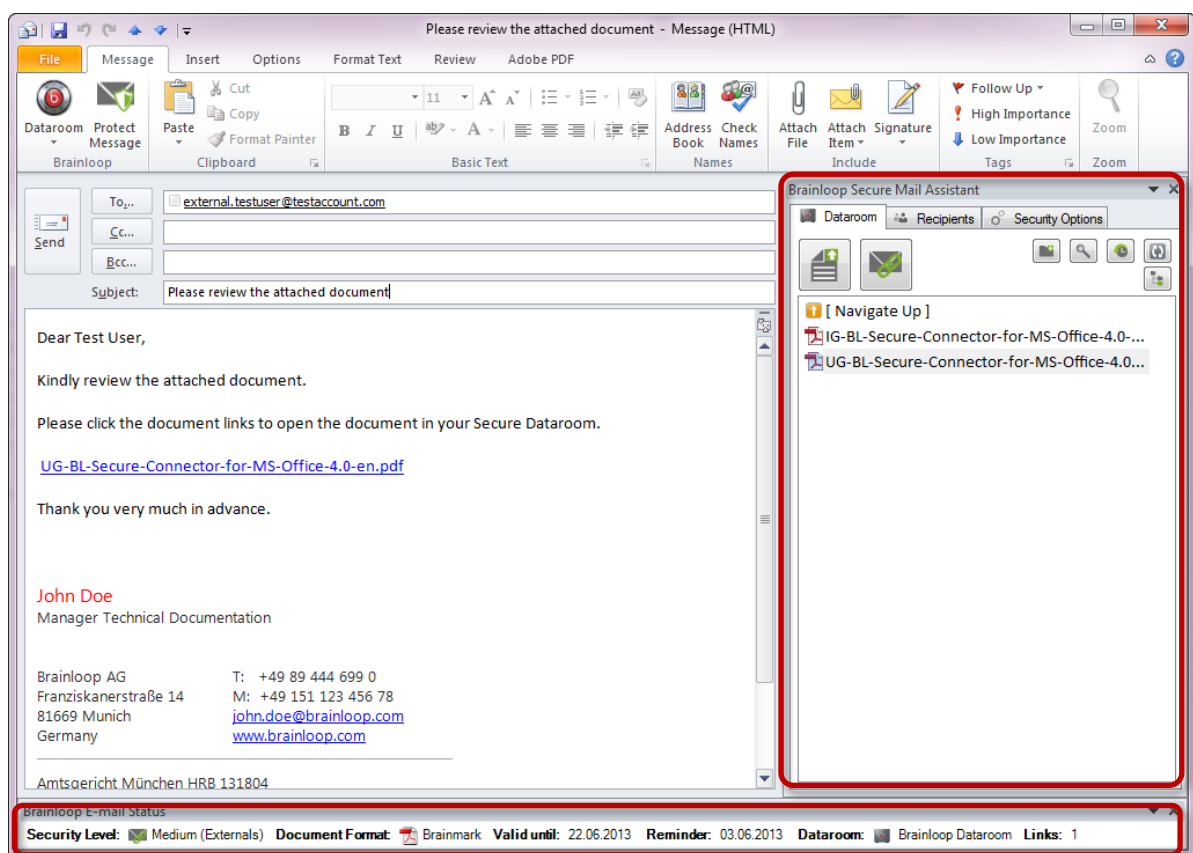
You can refresh the current list of Dataroom groups and users in the Brainloop Secure Mail Assistant.

To do so, click .

3.2.3 Functions in the Security Options Tab

3.2.3.1 General Information

The **Security Options** tab shows the security settings that are applied to your e-mail and the attachments being sent as secure links. These settings are taken from your Dataroom's settings, and may only be changed to some extent.

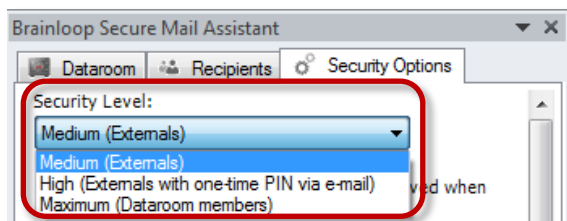


i The applied security settings are also shown in the bottom status bar of your e-mail. You can verify and adjust these settings by clicking the status bar. The Security Options tab is then opened (if not opened yet).

3.2.3.2 Change the Security Level

When sending a secure document link to externals, the least secure security level is suggested by default. If in the General Settings the **Prefer the "Maximum (Dataroom members)" security level when sending e-mails to Dataroom members** setting is activated, the most secure security level is suggested by default when sending secure document links to Dataroom members

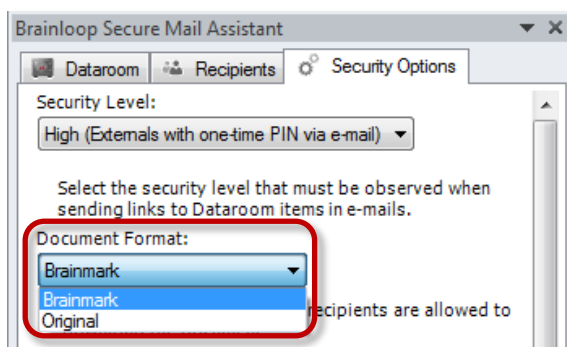
To change the security level that is applied to the sent document link, open the **Security Level** drop-down list and select one of the offered security levels.



For details on the available security levels, please refer to your User Manual for Brainloop Secure Dataroom Service.

3.2.3.3 Change the Document Format

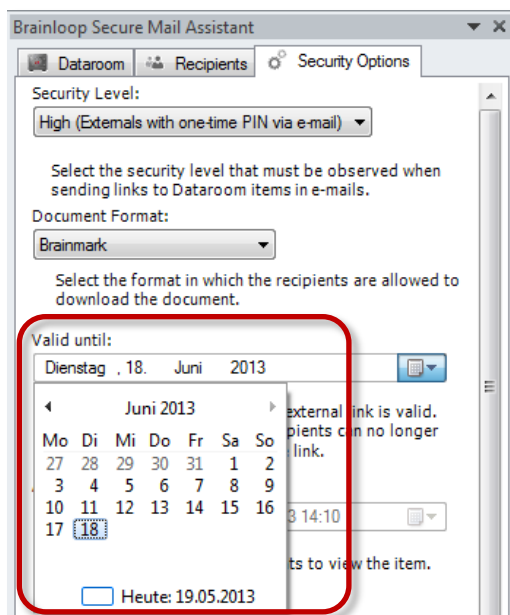
To change the format a document is delivered to the recipients, open the **Document Format** drop-down list and select one of the offered document formats.



For details on the delivered document format, please refer to your User Manual for Brainloop Secure Dataroom Service.

3.2.3.4 Change the Date until which an External Link is valid

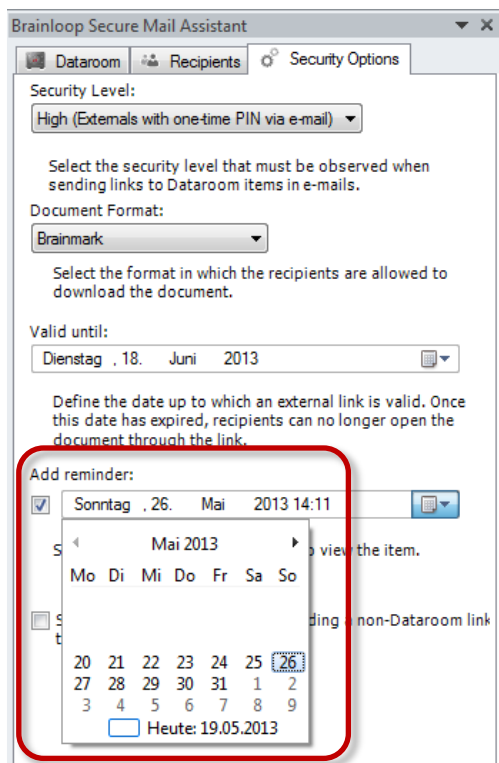
To change the date up to which the document link in an e-mail is valid, open the **Calendar** to the right of the **Valid until** date field.



For details on the validity of external document links, please refer to your User Manual for Brainloop Secure Dataroom Service.

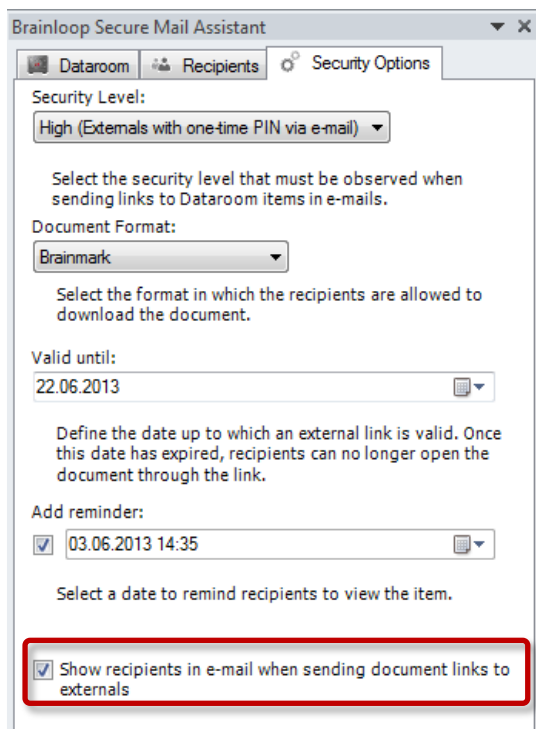
3.2.3.5 Add a Reminder Date

To add a date to remind the recipients to view the attached document link, activate the **Add reminder** option. Then open the **Calendar** to the right of the **Add reminder** date field and select the desired reminder date.



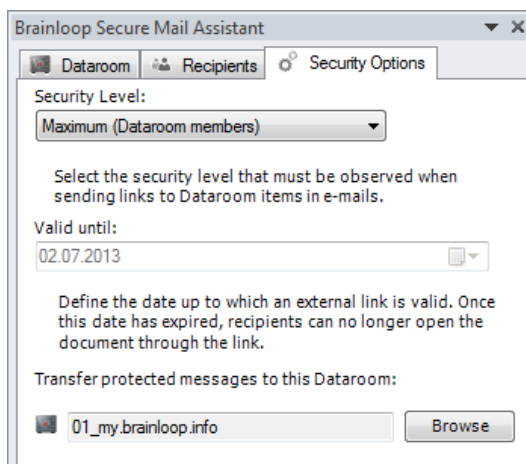
3.2.3.6 Show Recipients in an E-Mail with Attachments sent to Externals

To reveal the e-mail addresses of all recipients in e-mails with document links that were sent as external links, activate the **Show recipients in e-mail when sending document links to externals** option.



3.2.3.7 Change the Default Dataroom for Protected Messages

To change the default Dataroom to which your protected messages are transferred click the **Browse** button below **Transfer protected messages to this Dataroom** text.



Select the desired Dataroom from the **Select a Dataroom** dialog window.

3.3 “Always show the Brainloop Secure Mail Assistant when creating a new e-mail” Option

You can define in the **General Settings** of the Brainloop Secure Connector for Microsoft Outlook whether you want the **Brainloop Secure Mail Assistant** pane to be shown in every new e-mail window.


Please refer to our [Client Installation and Setup Guide](#) for further information regarding the settings of Brainloop Secure Connector for Microsoft Outlook.

4 Send Documents Securely Using the Brainloop Secure Connector

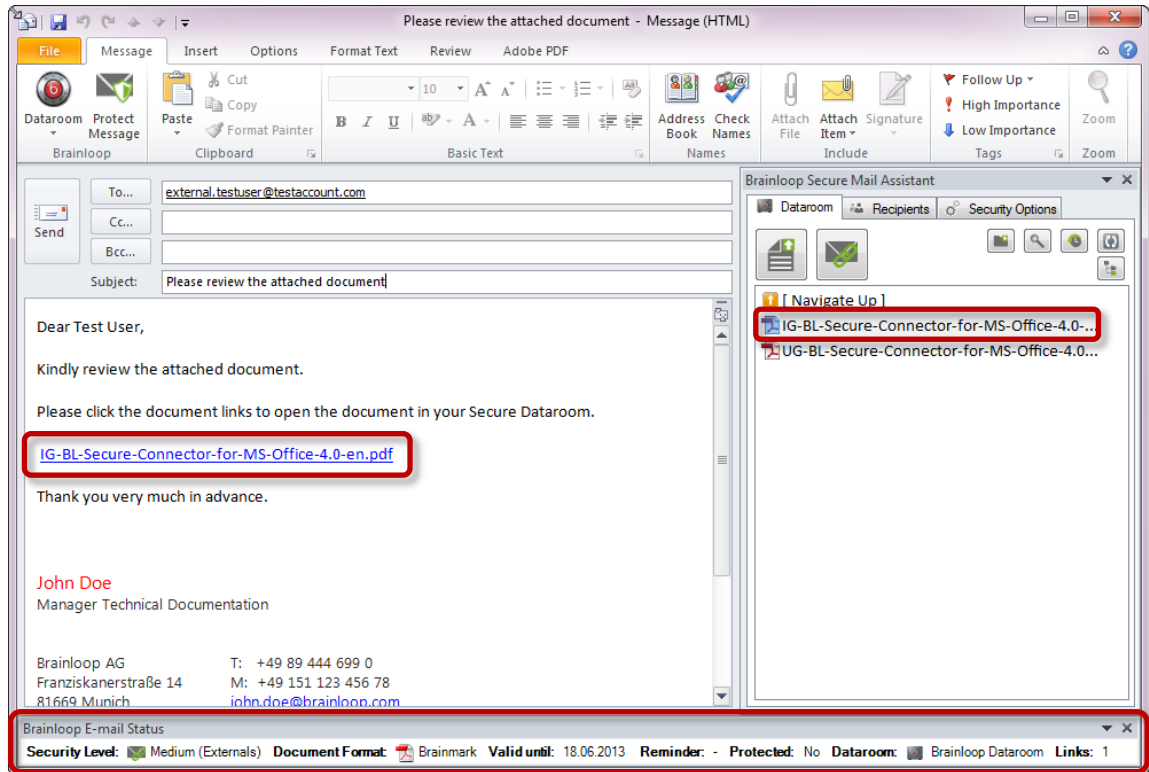
With the Brainloop Secure Connector for Microsoft Outlook you can send your Dataroom documents securely as links to Dataroom users or externals. Additionally, you can also send locally stored documents securely as a link and upload those documents to your Dataroom directly.

4.1 Send Documents that are Located in a Dataroom

To send a document that is stored in your Dataroom securely through the Brainloop Secure Connector for Microsoft Outlook, proceed as follows:

1. Open Microsoft Outlook.
2. Click the **New E-Mail** button in the **Home** ribbon, or press **Ctrl+N** to create a new e-mail message.
3. Enter the recipients manually, or open the **Recipients** tab in the Brainloop Secure Mail Assistant pane to the right of the e-mail. Select a Dataroom from the list to load its user groups and users. Then double-click the corresponding Dataroom user groups or Dataroom users to add them to the **To...** field.
4. Enter a subject and your message text as usual.
5. Position the cursor where you want to add the document link.
6. Open the **Dataroom** tab in the Brainloop Secure Mail Assistant pane to the right of the e-mail.
7. Navigate to the document(s) you want to insert into your e-mail.
8. To add a document to an e-mail, double-click it, or drag and drop it to the cursor's position. To add the document, you can also click .
9. The document is inserted into the e-mail as a secure link.

10. As an option, you can verify the applied Dataroom security settings by clicking the e-mail's bottom status bar. For details, see [Functions in the Security Options Tab](#), pages 22ff.




11. Click **Send** to send the e-mail including the document link.

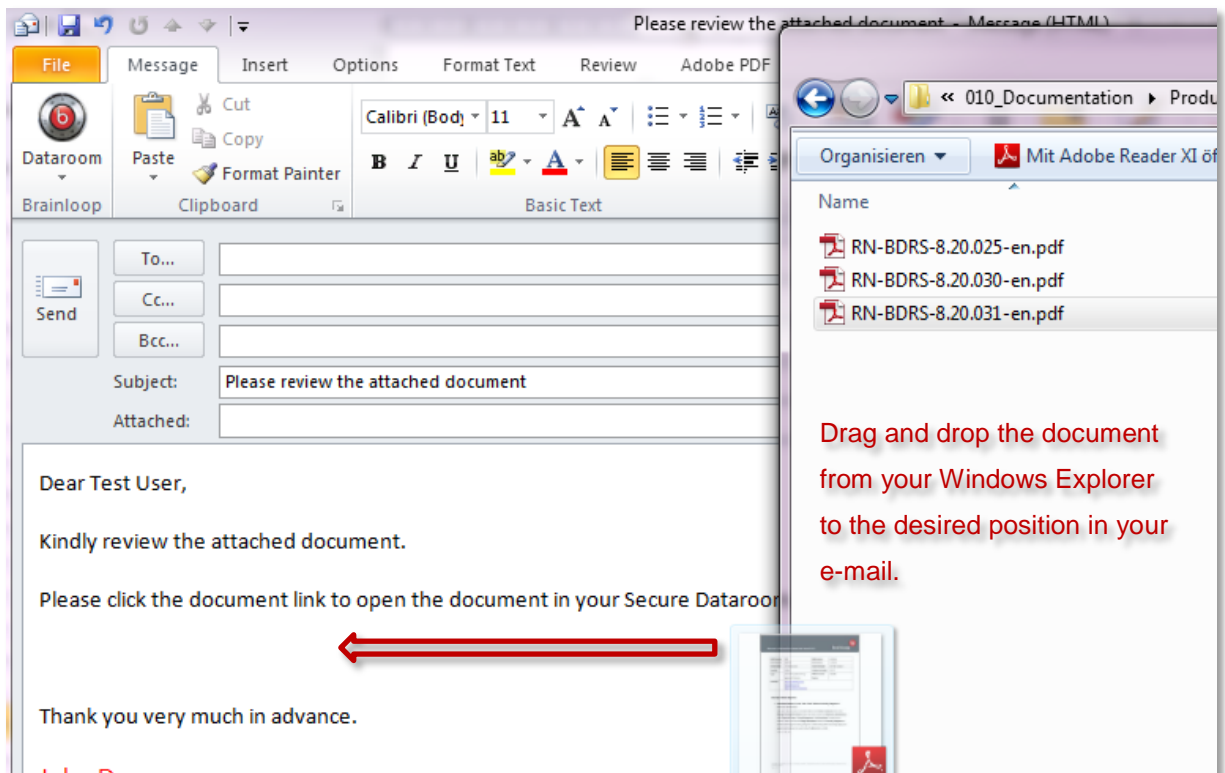
To protect the message so that recipients can only read the e-mail in their secure Dataroom, see chapter [Send and Read a Protected E-Mail](#), page 36.

Note: If you are adding a document link to plain text e-mails, a link similar to the following is placed into the e-mail and converted to a hyperlink when the e-mail is sent: `_Brainloop_link_please_do_not_edit_(1234567)_`

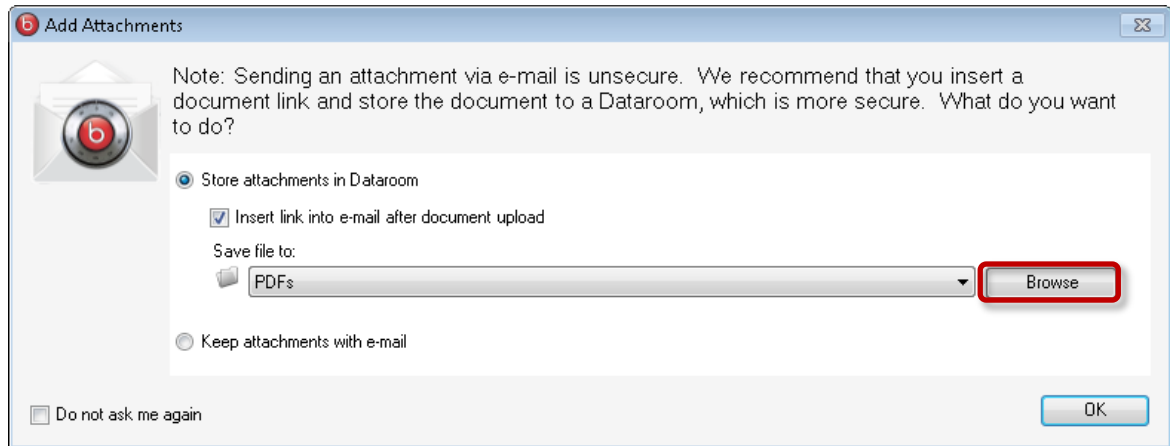
4.2 Send Local Documents Securely and Save them in a Dataroom

To send a document securely that is stored locally on your hard-drive, for example, through the Brainloop Secure Connector for Microsoft Outlook and save that document in a Dataroom, proceed as follows:

1. Open Microsoft Outlook.
2. Click the **New E-Mail** button in the **Home** ribbon, or press **Ctrl+N** to create a new e-mail message.
3. Enter the recipients manually, or open the **Recipients** tab in the Brainloop Secure Mail Assistant pane to the right of the e-mail. Select a Dataroom from the list to load its user groups and users. Then double-click the corresponding Dataroom user groups or Dataroom users to add them to the **To...** field.
4. Enter a subject and your message text as usual.
5. Position the cursor where you want to add the document link.
6. Open the **Windows Explorer**, navigate to the document's location and drag and drop it to the cursor's position. To add the document, you can also click .



7. Depending on your Brainloop Secure Connector configuration, the **Add Attachments** dialog window is opened.

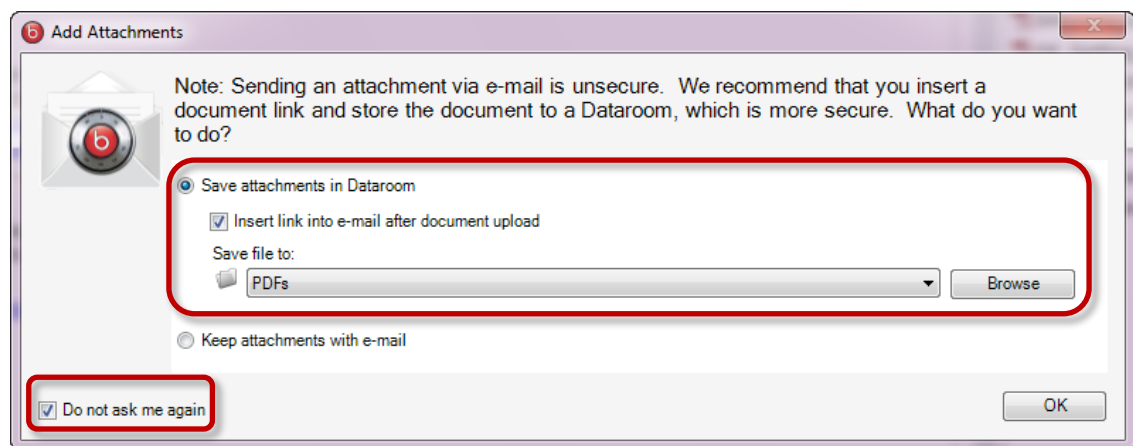


8. Click the **Browse** button and select the Dataroom folder where you want to save the document.
9. For details on how to use the **Do not ask me again** option, proceed to the next chapter.
10. Click **OK**.
11. The document is inserted into the e-mail as a secure link and is uploaded to the selected Dataroom folder.
12. Click **Send** to send the e-mail and the document linked to it.

4.2.1 Use “Do not ask me again” for Sending Local Documents Securely and Saving them in a Dataroom

To replace local attachments added to an e-mail by secure links and to save them in a Dataroom automatically without being asked anymore, proceed as follows:

1. In the **Add Attachments** dialog window, activate the **Save attachments in Dataroom** and **Insert link into e-mail after document upload** options.
2. Select a Dataroom folder to which the attachments are to be saved.
3. Then, activate the **Do not ask me again** option.



4. Click **OK** and send your e-mail as usual.
5. The next time, you open an e-mail and add local attachments to that it, those files are uploaded to the folder you defined in the **Add Attachments** dialog window and are inserted as secure links automatically. The **Add Attachments** dialog window is no longer displayed.
6. To reset this attachment handling behavior, proceed to the next chapter.

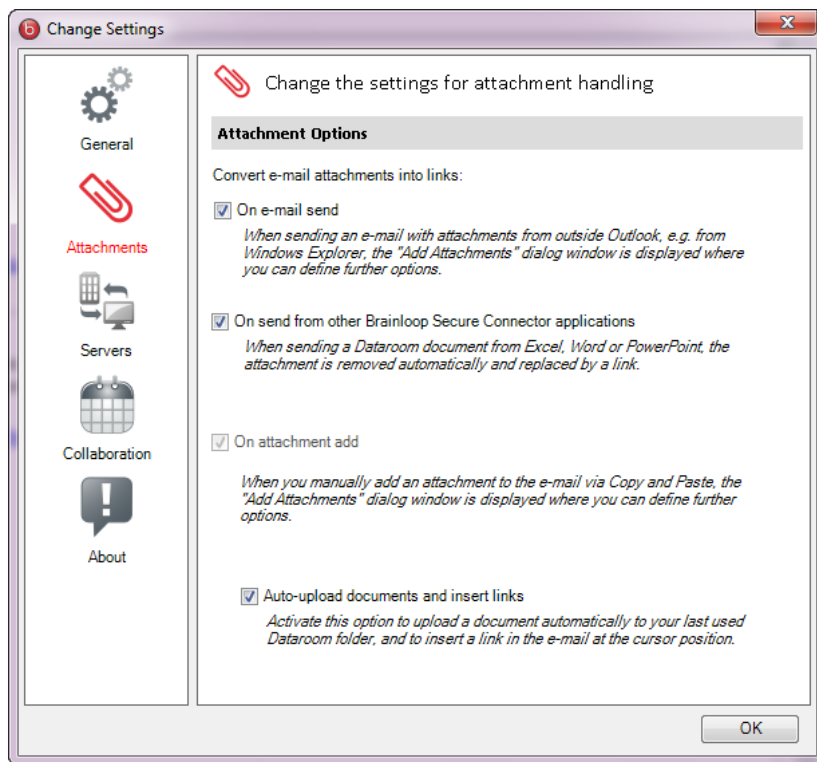
4.2.2 Reset the “Do not ask me again” Option for Sending Local Documents Securely and Saving them in a Dataroom

You can reset the attachment handling behavior you defined through the **Do not ask me again** option, as follows:

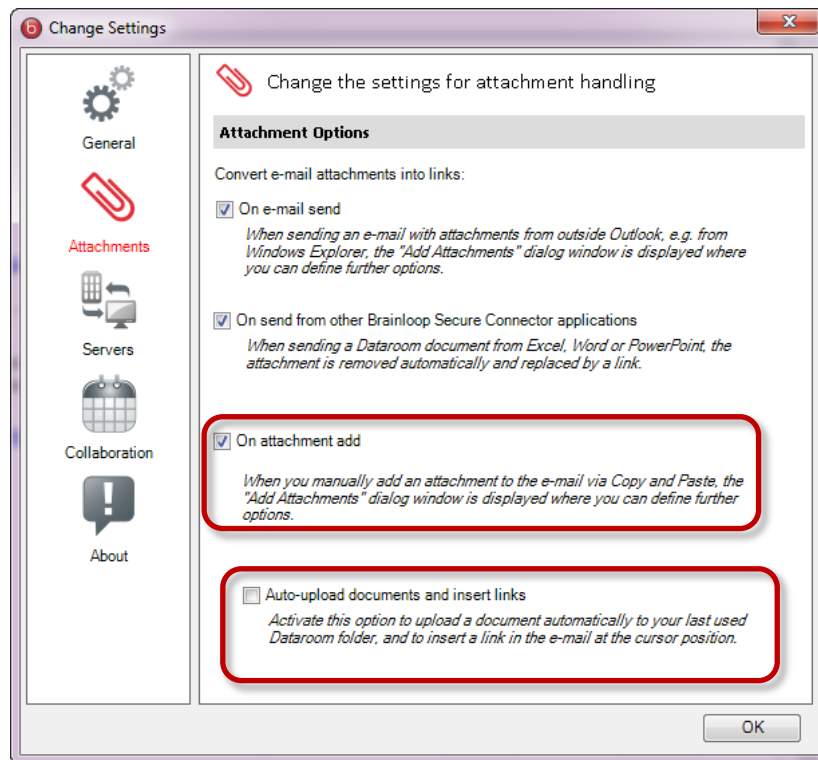
1. Open Microsoft Outlook.
2. Open the **Home** tab.
3. Click the **Dataroom** button and select **Settings**.
4. The **Change Settings** dialog window is displayed.



5. In the pane on the left side, click **Attachments**.



6. Deactivate the **Auto-upload documents and insert links** option at the bottom of this dialog window.
7. Make sure that the **On attachment add** option is activated.




8. Click **OK**.

With these settings, the **Add Attachments** dialog window is displayed again when adding a local attachment to an e-mail.

4.3 Send and Read a Protected Message

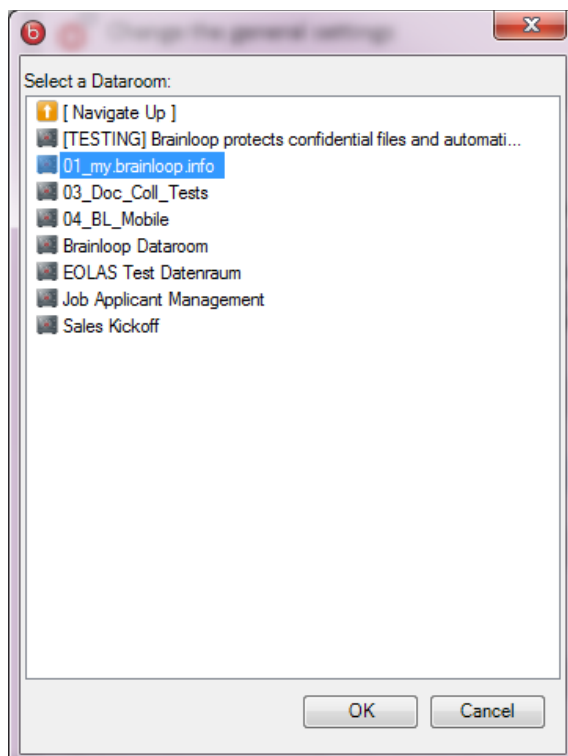
You can protect a message so that recipients can only read the e-mail in their secure Dataroom. Recipients then receive an e-mail with the subject “Protected Message”. You can send a protected message directly from the **Message** ribbon in an open e-mail by clicking the new **Protect Message** button. In addition, you can define a default Dataroom into which all protected messages are transferred.

1. Open Microsoft Outlook.
2. Click the **New E-Mail** button in the **Home** ribbon, or press **Ctrl+N** to create a new e-mail message.
3. Enter the recipients, a subject and your message text as usual.
4. If applicable, add an attachment to your e-mail.

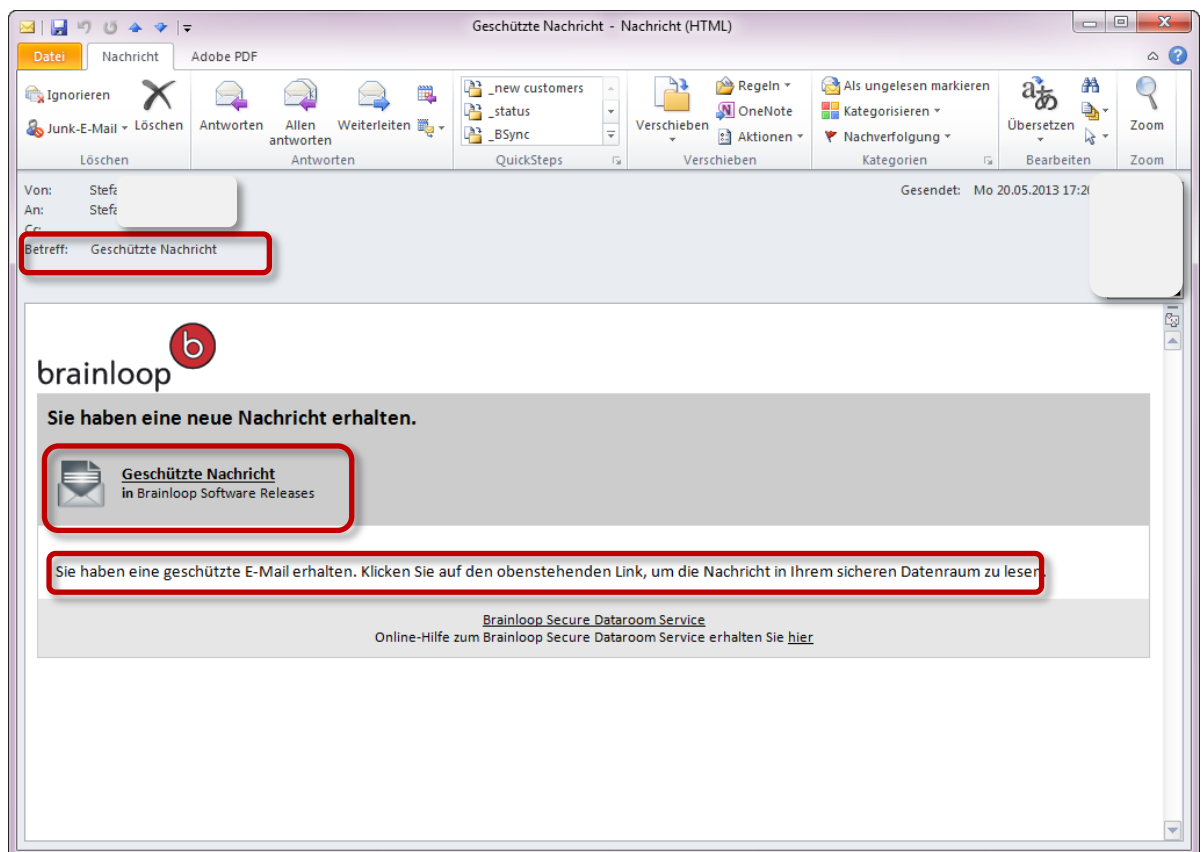
5. Click the **Protect Message** button . The button is highlighted once the protection is activated:



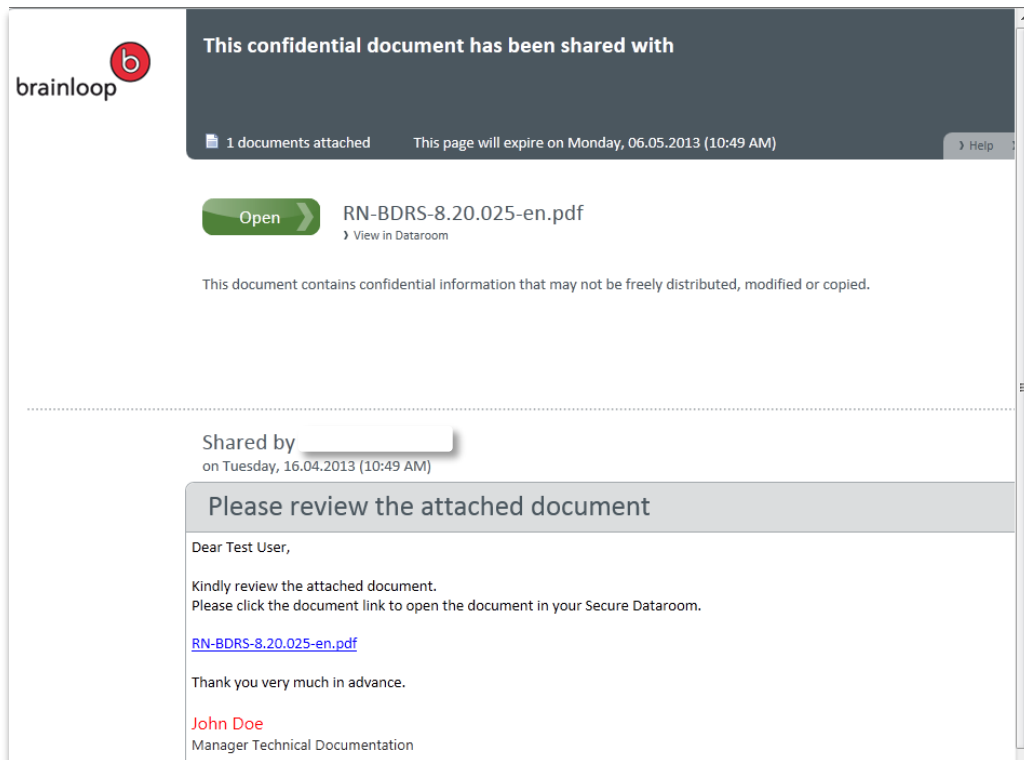
6. If you have not yet defined a default Dataroom to which the protected message is to be transferred to, you are asked to do so now. The **Select a Dataroom** dialog window is displayed.



7. Select a Dataroom and click **OK**. Your selection is saved in the **Security Options** where it can be changed at any time (see [Change the Default Dataroom for Protected Messages](#), page 27).
8. Click **Send** to send the protected e-mail.
9. As a recipient you receive an e-mail with the subject “Protected Message”.




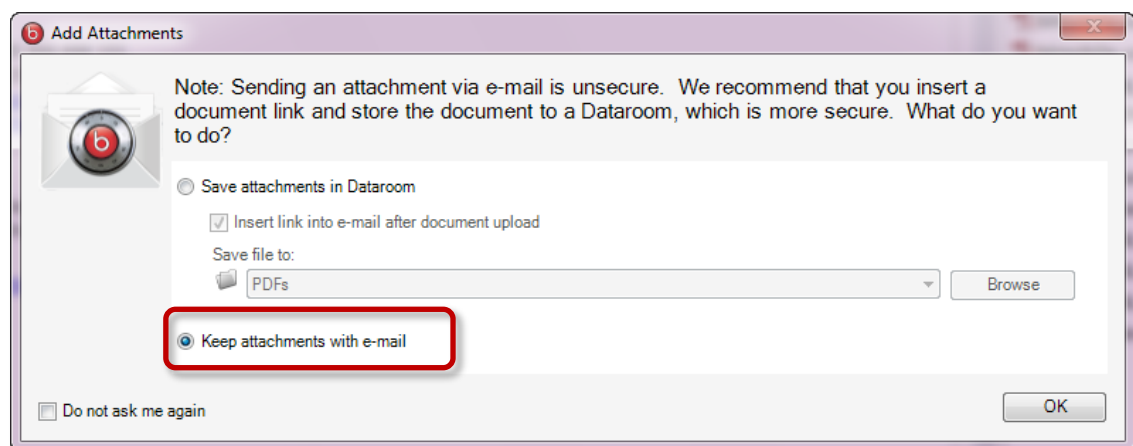
10. Click the **Protected Message** link. You are directed to a landing page on which you can read the message text.
11. If a document was attached to that e-mail, click **Open** to open the document directly, or click **View in location** to log in to the corresponding Dataroom.



4.4 Send Local Documents as Real Attachments (not recommended)

With the Brainloop Secure Connector for Microsoft Outlook, you may also send attachments as real attachments that are not replaced by secure links. However, please note that this method is not recommended, as it is insecure.

1. Open Microsoft Outlook.
2. Click the **New E-Mail** button in the **Home** ribbon, or press **Ctrl+N** to create a new e-mail message.
3. Enter the recipients manually, or open the **Recipients** tab in the Brainloop Secure Mail Assistant pane to the right of the e-mail. Select a Dataroom from the list to load its user groups and users. Then double-click the corresponding Dataroom user groups or Dataroom users to add them to the **To...** field.
4. Enter a subject and your message text as usual.
5. Position the cursor where you want to add an attachment.
6. Open the **Windows Explorer**, navigate to the document's location and drag and drop it to the cursor's position. To add the document, you can also click .
7. Depending on your Brainloop Secure Connector configuration, the **Add Attachments** dialog window is opened.
8. Activate the **Keep attachments with e-mail** option.

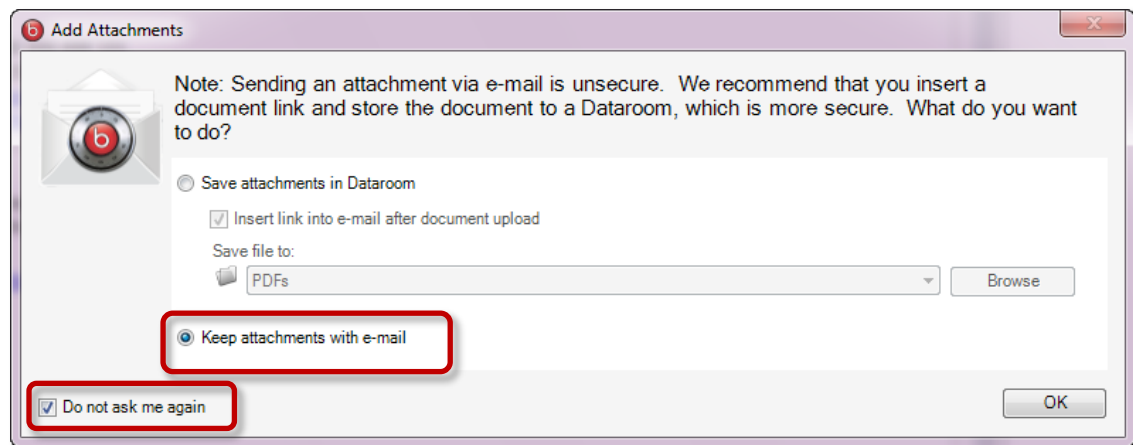


9. For details on how to use the **Do not ask me again** option, proceed to the next chapter.
10. Click **OK**. The attachment is inserted into the e-mail as a real attachment.
11. Click **Send** to send the e-mail and its attachment.

4.4.1 Use “Do not ask me again” for Sending Local Documents as Real Attachments (not recommended)

To send local attachments added to an e-mail as real attachments automatically without being asked anymore, proceed as follows. Please keep in mind that this method is insecure.

1. In the **Add Attachments** dialog window, activate the **Keep attachments with e-mail** option.
2. Then, activate the **Do not ask me again** option.



3. Click **OK** and send your e-mail as usual.
4. The next time you open an e-mail and add local attachments to it, those files are added as real attachments automatically. The **Add Attachments** dialog window is no longer displayed.
5. To reset this attachment handling behavior, proceed to the next chapter.

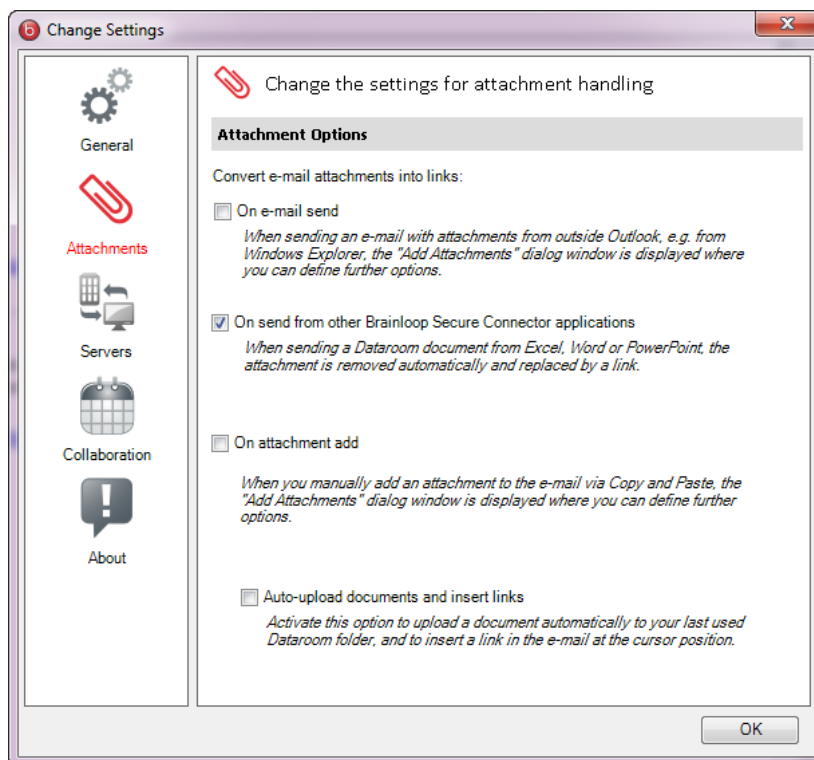
4.4.2 Reset the “Do not ask me again” Option for Sending Attachments as Real Attachments

You can reset the attachment handling behavior you defined through the **Do not ask me again** option, as follows:

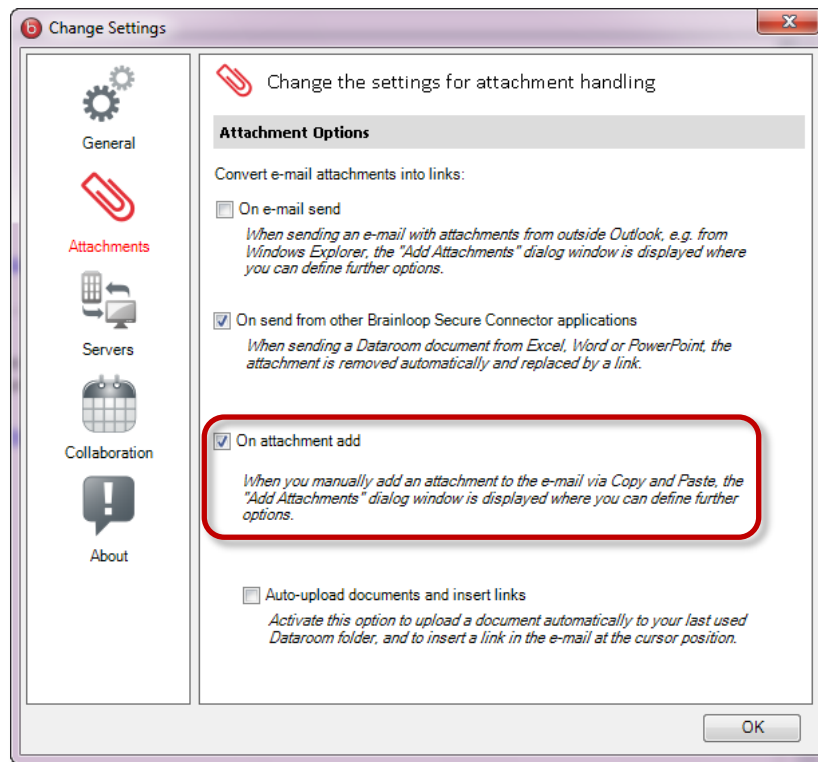
1. Open Microsoft Outlook.
2. Open the **Home** tab.
3. Click the **Dataroom** button and select **Settings**.
4. The **Change Settings** dialog window is displayed.



5. In the pane on the left side, click **Attachments**.



6. Reactivate the **On attachment add** option.



7. Click **OK**.

With these settings, the **Add Attachments** dialog window is displayed again when adding a local attachment to an e-mail.

5 Save Documents through the Brainloop Secure Connector Documents to a Brainloop Dataroom

5.1 Save Documents to a Dataroom Manually and Insert Secure Links

With the Brainloop Secure Connector for Microsoft Outlook you can upload any of your local documents conveniently and quickly to your Dataroom and send those documents securely as document links.

The proceeding is the same as described in chapter [Send Local Documents Securely and Save them in a Dataroom](#), page 31.

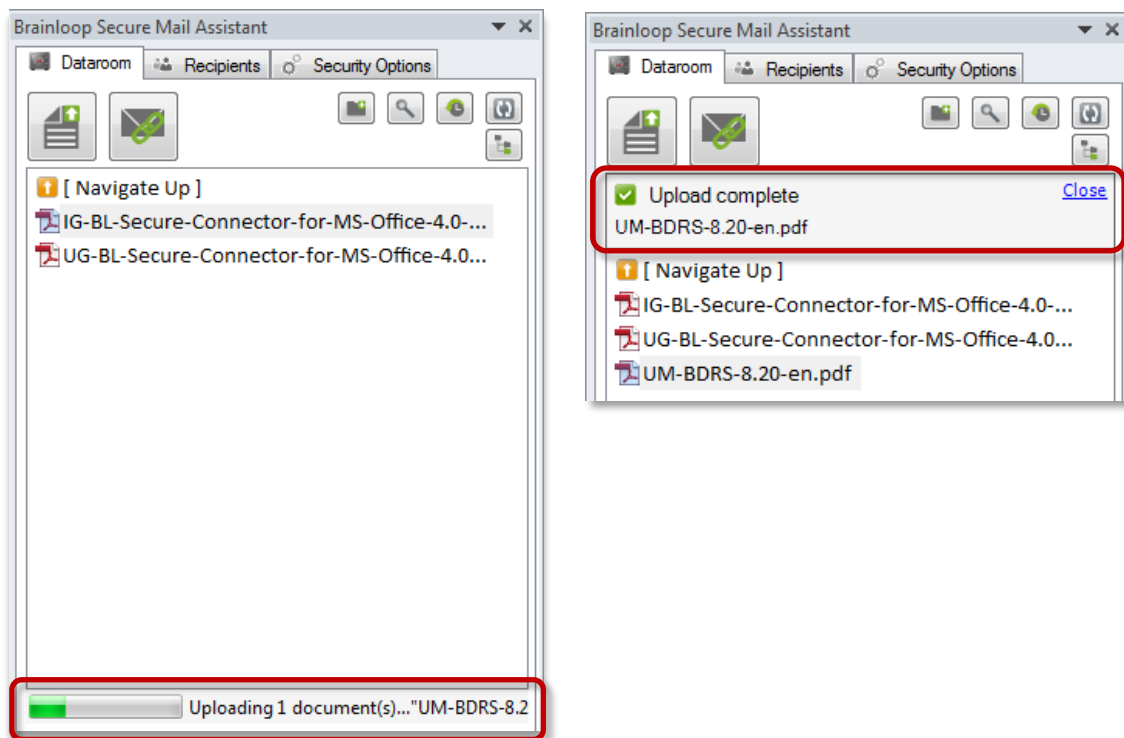
In the **Add Attachments** dialog window make sure that the **Save attachments in Dataroom** and **Insert link into e-mail after document** upload options are activated.

5.2 Save Documents to a Dataroom and Insert Secure Links Automatically

Your system administrator can configure that local documents that are attached to an e-mail are saved in a Dataroom and are replaced by a secure document link, these two actions being executed automatically.

With this setting activated in your Brainloop Secure Connector, the document you attach to an e-mail is saved automatically to your last used Dataroom folder, and is replaced by a secure link in the e-mail which is inserted at the cursor position.

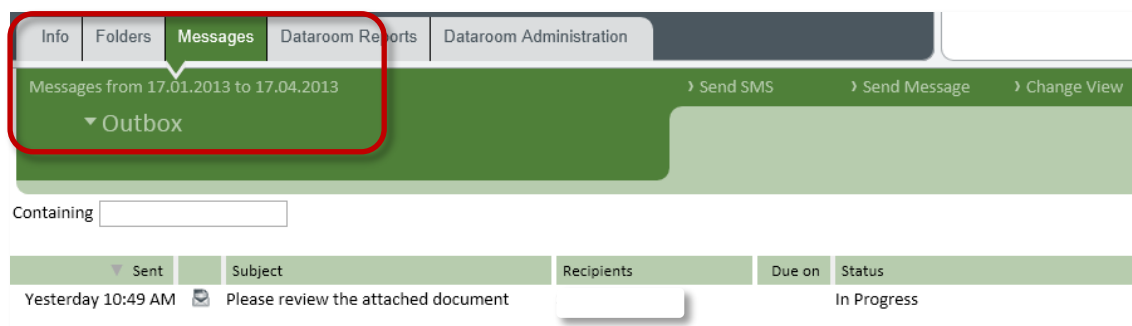
i The upload of the document to a Dataroom folder is done in the background. Please note that uploading a large document and inserting a secure document link in the e-mail can take several minutes. Look at the “Uploading...” progress bar at the bottom of the Brainloop Secure Mail Assistant pane and do not abort that process. Once the upload is complete a message text is displayed on top of the Dataroom tab.



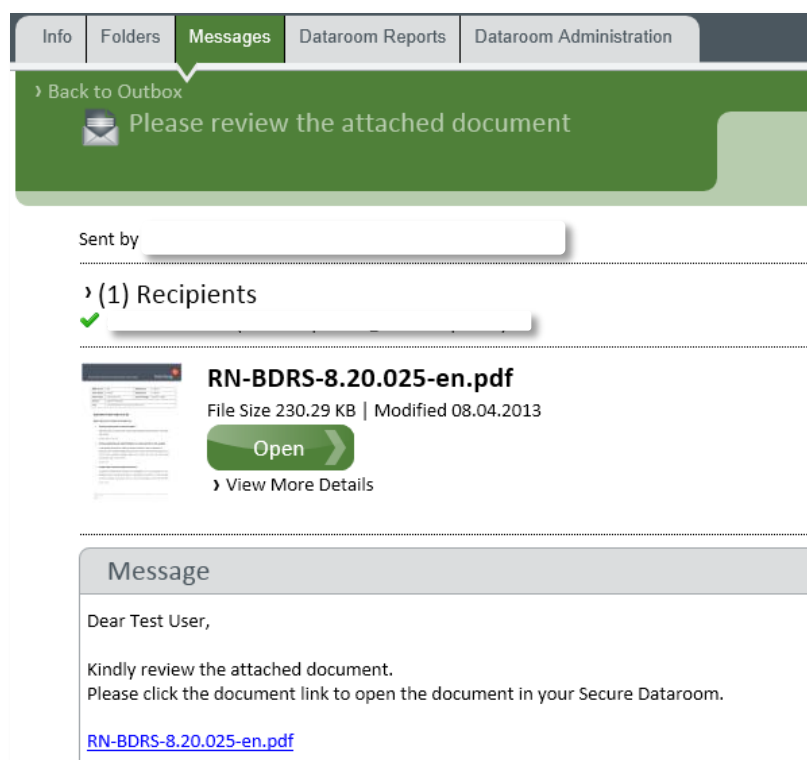
6 Track Document Delivery in the Dataroom

You can track whether recipients have opened a document you sent as a secure link through the Brainloop Secure Connector in your Dataroom's **Messages Outbox**.

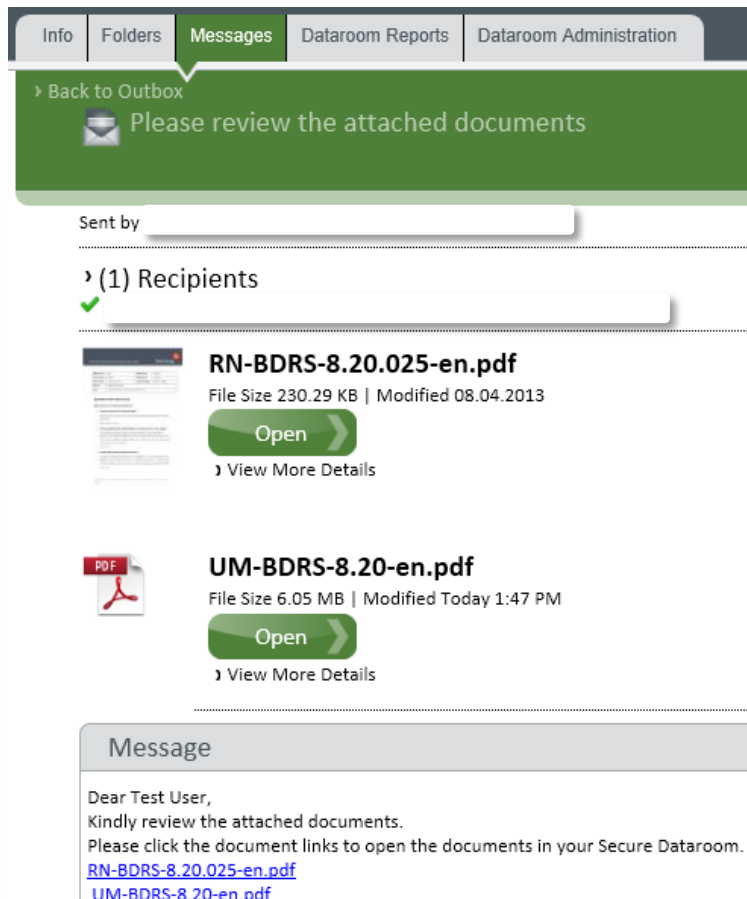
1. Log on to your Dataroom.
2. Open the **Messages** tab and here open your **Outbox**.
3. Your message is shown in the list and is assigned a status so you can see at a glance whether the related document has been accessed by all the recipients.



4. If there is more than one recipient and not all of them have accessed the document, you can check the status for each recipient in the message detail view. Click the message in the list to open that view.



5. If the e-mail contains more than one attachment, the resulting documents can all be accessed individually through the message's details view:



7 Collaborate on Microsoft Office Documents through the Brainloop Secure Connector for Microsoft Outlook

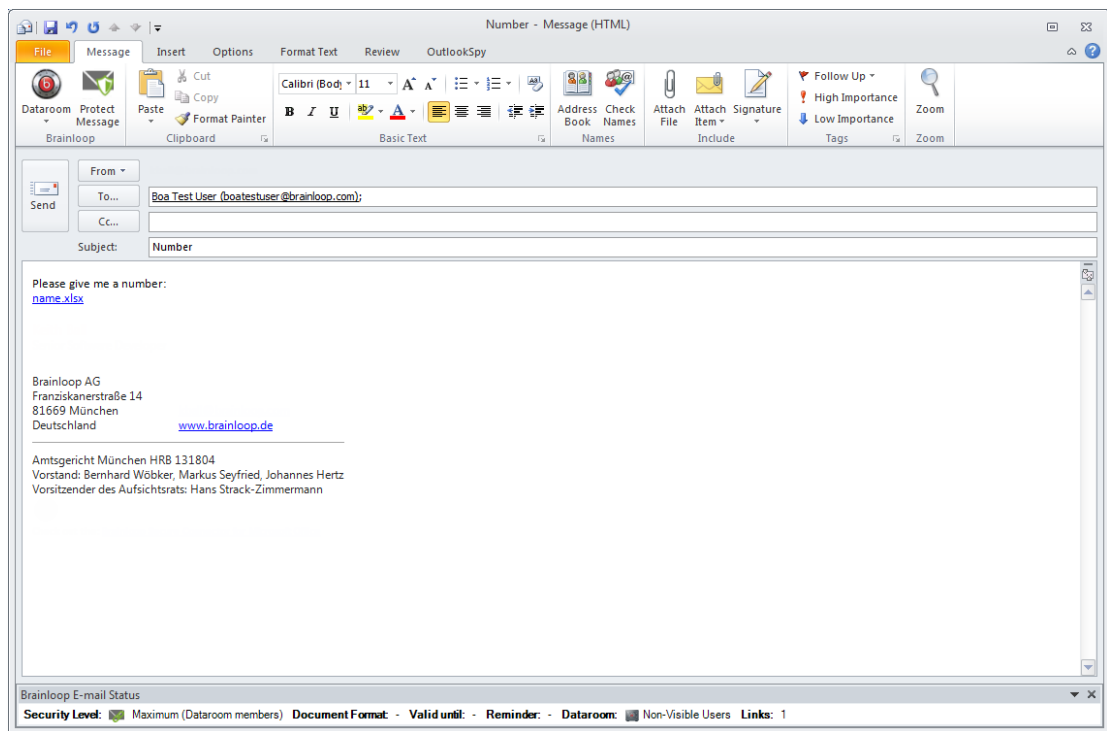
You can start a collaboration process with other Dataroom members asking them to edit Microsoft Office documents directly from the Secure Connector. The recipient receives an e-mail with a secure document link including an **Edit** action and can edit the document directly by clicking that link. While the document is downloaded the recipient's permissions are checked. If the recipient does not have the necessary permissions they are prompted to request them by e-mail. The owner can then approve this request and grant the necessary permissions simply by responding to the e-mail request.



Tip: You can also send a Microsoft Office document by secure mail directly from within Excel, Word, or PowerPoint respectively. For further information, please refer to our User Guides for the Brainloop Secure Connector for [Microsoft Excel](#), [Microsoft Word](#), and [Microsoft PowerPoint](#).

7.1 Send a Microsoft Office Document by E-Mail

1. Open Microsoft Excel, Word, or PowerPoint.
2. Create your document.
3. Save the new document to your Dataroom.
4. Open Microsoft Outlook and open a new e-mail.
5. Enter the recipients, a subject and your message text as usual.
6. Attach the document as a secure document link.

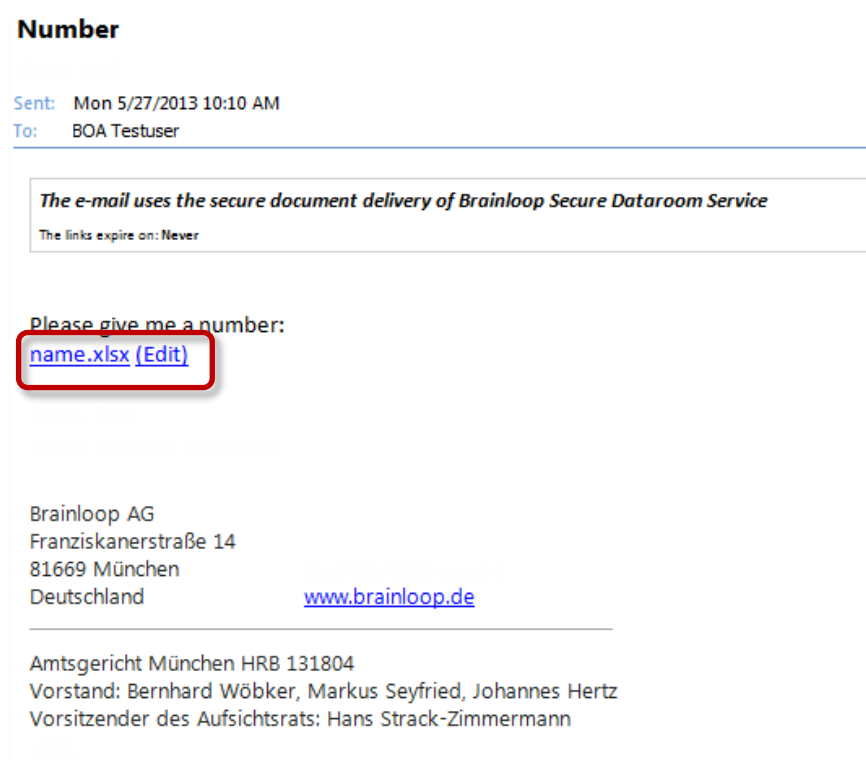


7. Click **Send** to send the e-mail and its document link.

7.2 Ask for Edit Permissions for a Microsoft Office Document by E-Mail

As a recipient, you now receive an e-mail with a secure document link including the **Edit** action.

1. Open this e-mail in your Outlook inbox.
2. Click the **Edit** link, which you find in parentheses behind the document name.

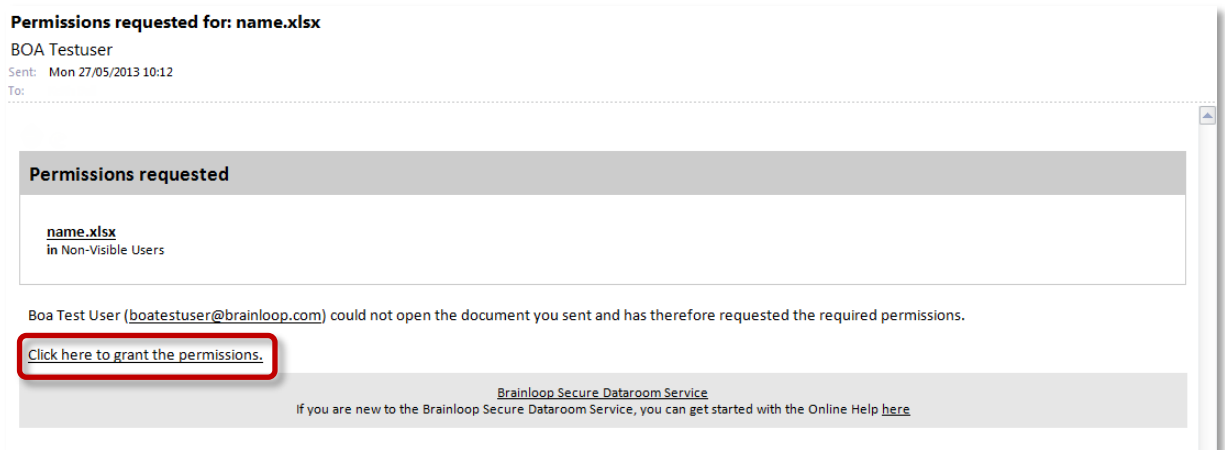


3. The document is now downloaded from the Dataroom and your permissions are checked. If you do not have **Edit** permissions you are asked whether you want to request the required permissions from the document owner.
4. Answer the prompt "Do you want to request the required permissions from "name of user"?" with **Yes**.

7.3 Grant Edit Permissions for a Microsoft Office Document by E-Mail

As the document owner, you now receive an e-mail with the subject “**Permissions requested for: name of document**”, and you can decide whether or not you want to allow the recipient to edit that document.

1. Open the “Permissions requested for” e-mail in your Outlook inbox.
2. To give the recipient the required permissions, click the **Click here to grant the permissions** link at the bottom of this e-mail.

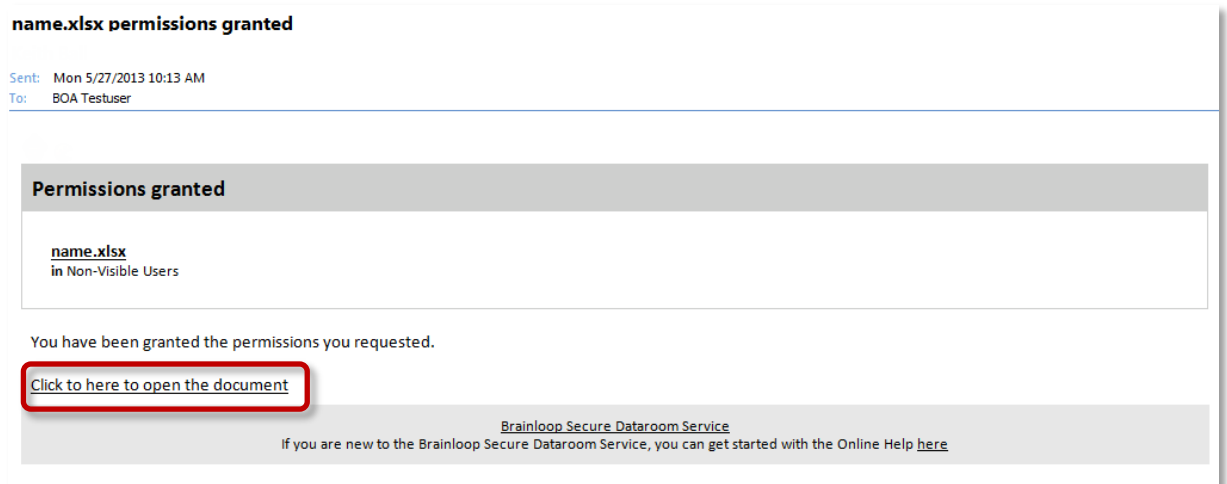


3. Answer the prompt “Are you sure you want to grant Edit permissions to "name of user" for the document?” with **Yes**.

7.4 Edit a Microsoft Office Document after Permissions were Granted by E-Mail

As a recipient, you now receive an e-mail with the subject “**Permissions granted**”, and you can open and edit that document directly from the Secure Connector.

1. Open this e-mail in your Outlook inbox.
2. Click the **Click here to open the document** link at the bottom of this e-mail.



3. The document is now opened in Microsoft Excel, Word, or PowerPoint, where you can edit it directly.

8 Known Restrictions

Please read the below-listed restrictions that apply to using the Brainloop Secure Connector for Microsoft Outlook.

Restrictions for adding secure document links:

- You may only add links to documents that are located on the same Dataroom server and in the same Dataroom.
- You may only collaborate with Dataroom members on Microsoft Office documents. You cannot send secure document links to externals.
- The security level that is selected for a secure document link is generally applied to all the secure links in an e-mail. You cannot specify different security levels for multiple secure documents link in one e-mail.

Restrictions for sending e-mails:

- You cannot send Bcc e-mails with the Brainloop Secure Connector.
- Currently, you cannot send an e-mail containing embedded pictures as a protected message.

Archiving of E-mails in HTML Format no longer possible:

- E-mails can no longer be archived in a Dataroom as html files. However, they can be archived as *.msg files.

Blacklisting and Whitelisting of E-Mail Addresses no longer available:

- Blacklisting and whitelisting of e-mail addresses for constraining the automatic triggering of Send Securely is no longer available.

Installation of Brainloop Secure Connector with Microsoft Office 2007

- When installing the Brainloop Secure Connector for Microsoft Office 2007, the Office add-ins are only enabled, if the Brainloop Secure Connector is installed manually using the **Advanced Mode** option and the “Installation Scope” **Install just for you (Username)**.

9 Appendix: Document revision history

Version	Date of change	Revision
1.0	31 January 2014	First release for the Brainloop Secure Connector for Microsoft Outlook Version 4.3
1.1	14 October 2014	Added a new restriction for sending e-mails: "Currently, you cannot send an e-mail containing embedded pictures as a protected message."
1.2	13 July 2015	Update to version 4.4; no content changes
1.3	12 October 2015	Update to version 4.5 Added a new restriction regarding the installation of Brainloop Secure Connector with Microsoft Office 2007, see page 52.