

# Confide for Microsoft 365

Your Cloud. Our SaaS. A Powerful Combination.

## Configuration

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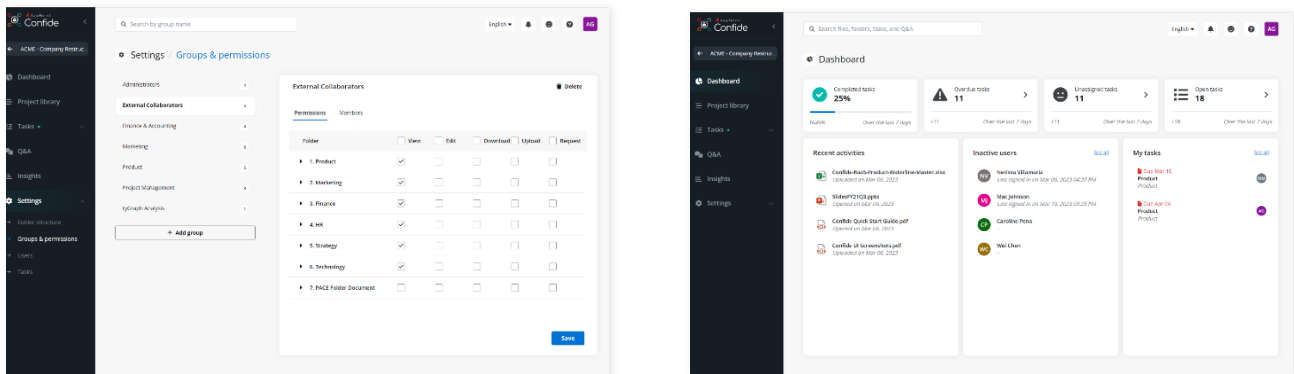
- **Minimal IT involvement** - Confide enables business leaders to be self-sufficient, configuring project workspaces and managing settings without ongoing IT support.
- **No installation** - Since Confide is an AvePoint SaaS offering, there is no installation involved for the customer. Based within our Confidence platform, powered by AvePoint Online Services (AOS), one single Confide installation can support multiple M365 tenant scenarios.
- **Delegated administration** - Specific users can be designated as "Business Owners" which allows them to administer a workspace, create projects, assign permissions, and more.
- **SSO for external tenants** - External M365 users can leverage single sign-on (SSO) to log into your Confide instance with their home M365 account, eliminating the need to maintain a separate set of credentials for Confide. *Note: This requires the users' home M365 tenant to allow consent to the Confide SSO app.*

## Project Administration

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- **Project setup** - Set up and manage projects with an intuitive, wizard-style workflow.
- **Pre-built or custom templates** - Use one of Confide's out-of-the-box project templates to expedite workspace setup, or create a custom template to suit your specific requirements.
- **Custom folder structure** - Build out your project library with fully customizable folders and subfolders. Easily update your structure to meet changing needs.
- **Project insights** - Drill down into individual projects to monitor user activity, project engagement, file/folder consumption, project health, and more.
- **User insights** - Use Confide's intuitive dashboards to see which files have been opened, when, and by whom. Or better yet, select a specific user or group to see which files they've interacted with.
- **Permission by Groups & Users** - Create Groups with granular, custom permissions, then add users as appropriate. As needs change, Project Leads can easily downgrade, change, or remove users' access.
- **Bulk file upload** - Upload multiple files or folders at one time using simple drag-and-drop functionality. Confide will retain your existing folder structure.
- **Bulk user upload** - Use a template to bulk upload users to a project and designate which groups they should be added to. These users will inherit the groups' permissions.
- **Multiple administrators** - Add one or more additional administrators to a project, giving them access to manage permissions, update statuses, manage tasks and more.

- **Clone project** - Quickly duplicate an existing project, choosing to clone Groups, Permissions, Project Library structure, or all of the above.



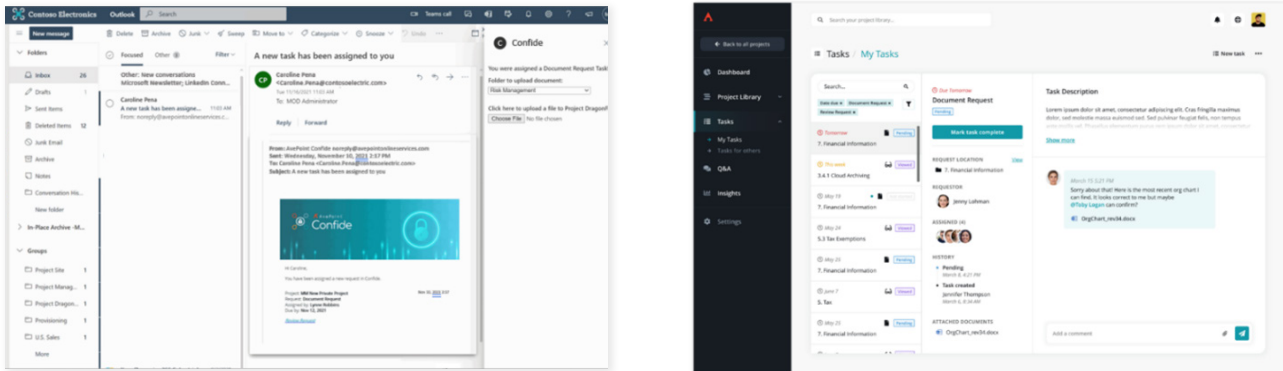
## Collaboration

- **Task management** - Manage your workflow with ease, assigning tasks and collaborating with teammates through secure, in-line communications.
- **Bulk task upload** - Create multiple tasks at once by uploading an Excel template. Task fields will automatically be populated based on the imported file.
- **Audit trail** - View activity history (audit trail) for each task, including communications, file uploads, status updates, and more.
- **Multiple tenants** - Project Leads can invite and manage users across several tenants. Internal users that belong to other tenants can be added as an administrator or contributor, depending on project needs.
- **Guest user collaboration** - Confide enables easy collaboration with external users. Guest users are not required to have external Office 365 access enabled.
- **Document status tracking** - Keep track of what documents have been opened and what is currently being reviewed by project contributors.
- **Q&A (beta)** - Easily communicate within your project amongst various collaborators. Chat with other Confide project members based on folder location and group permissions.

## Seamless User Experience

- **Single Sign-On** - Log in to Confide using your Office 365 credentials.
- **Centralized dashboard** - View all active projects at a glance, highlighting recently added files.
- **Personalized dashboard** - Jump back to your most recently accessed files from your personalized project dashboard.
- **Task management** - Easily create, assign, and manage tasks from a simple dashboard.
- **Task tracking** - Track and monitor active tasks assigned to you with a project-level view. View completion percentages at the project or user level, and manage unassigned tasks all from one convenient dashboard.
- **Outlook integration** - Upload email attachments directly to a Confide project and rest easy knowing the file will automatically inherit the project's permission settings. Alternatively, share links to Confide files directly in Outlook.

- **Email notifications** - Stay abreast of the latest project updates with a personalized email digest, which aggregates your most recent project updates, including newly added files, upcoming task deadlines, and more.
- **Global search by project** - Enter keywords to search for a file, folder, or task within your selected project. Users will only see results from areas to which they have been granted access.



## Security

- **Customer-hosted content** - Each secure project workspace creates a restricted site collection, stored within the customer's own Microsoft 365 tenant.
- **Low-friction** - Simplify external collaboration by enabling guest users to create a local account for Confide, eliminating the need for their organizations to enable external Office 365 access.
- **File content encryption** - Project Leads can encrypt a project's file contents. For highly secure projects, they can choose to enable Confide's "Crypto Lock" feature which completely encrypts project data from any internal exposures, such as a bad actor scenario with a global IT admin.
- **Permission management** - Grant, change, or revoke user and group permissions at any time.
- **Controlled communications** - Keep project-related communications and collaboration within Confide, rather than using external solutions like email or chat.
- **Azure AD protection** - Minimize security risks by working within Confide, rather than inviting external users into your own Azure AD environment.
- **IT shielding** - By default, M365 SharePoint service admins and Global admins do not have permission to access individual SharePoint sites. Confide projects are only accessible to the Confide service account.
- **Watermark** - Enable watermark functionality, selecting from pre-set templates or creating your own custom version.
- **Delete** - Project Leads and Administrators can delete a project at any time. This option removes all data from the data center, leaving no record behind.
- **Archive** - Archive a completed project by revoking all permissions. This option will leave the completed project in the administrator's project list for future reference or accessibility.

For more information,  
please visit  
[www.confide.me](http://www.confide.me).

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