Colligo Briefcase 6.1

User Guide

Colligo

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COLLIGO BRIEFCASE FOR WINDOWS

Welcome to Colligo Briefcase for Windows. Briefcase offers full offline support, advanced metadata support, and industry-leading sync and security capabilities, enabling organizations to embrace BYOD while maintaining control of their corporate data.

Key Features

- **Tag:** Add automatic or customized metadata
- **Sync**: Make your SharePoint content available when offline
- **Share:** Replace attachments with links for easy collaboration

Benefits

- Sync SharePoint desktops & laptops for mobility & performance
- Enable productive offline access
- Edit files, lists, and metadata
- Easy-to-use, familiar desktop interface
- Drive enthusiastic SharePoint adoption
- Alleviate slow connectivity to SharePoint
- Replace network shares with SharePoint for document storage and collaboration

Platforms Supported

- SharePoint 2010, SharePoint 2010 Online (Office 365), and SharePoint 2013
- Outlook 2007, 2010, and 2013 (32-bit and 64-bit)
- Windows XP, Windows Vista, Windows 7, and Windows 8

NOTE: The screenshots in this document use Outlook 2010, SharePoint 2010, and Windows 7. Your user interface may differ depending on your specific configuration.

Colligo Briefcase Interface

Colligo Briefcase consists of a core, stand-alone product interface and a Windows Explorer extension. Depending on your preference, you can use one or both interfaces as the functionality is essentially identical. Ie. You can perform an action in one interface and the other will reflect the change.

The stand-alone product is launched from the **Start** menu or from the system tray icon and displays as follows:

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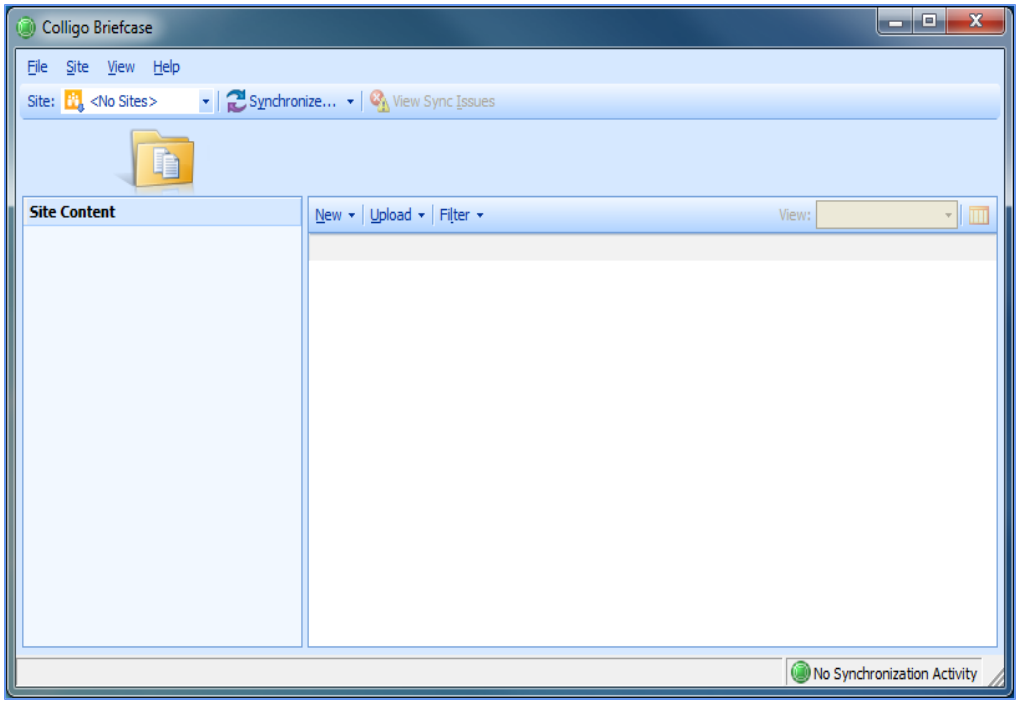
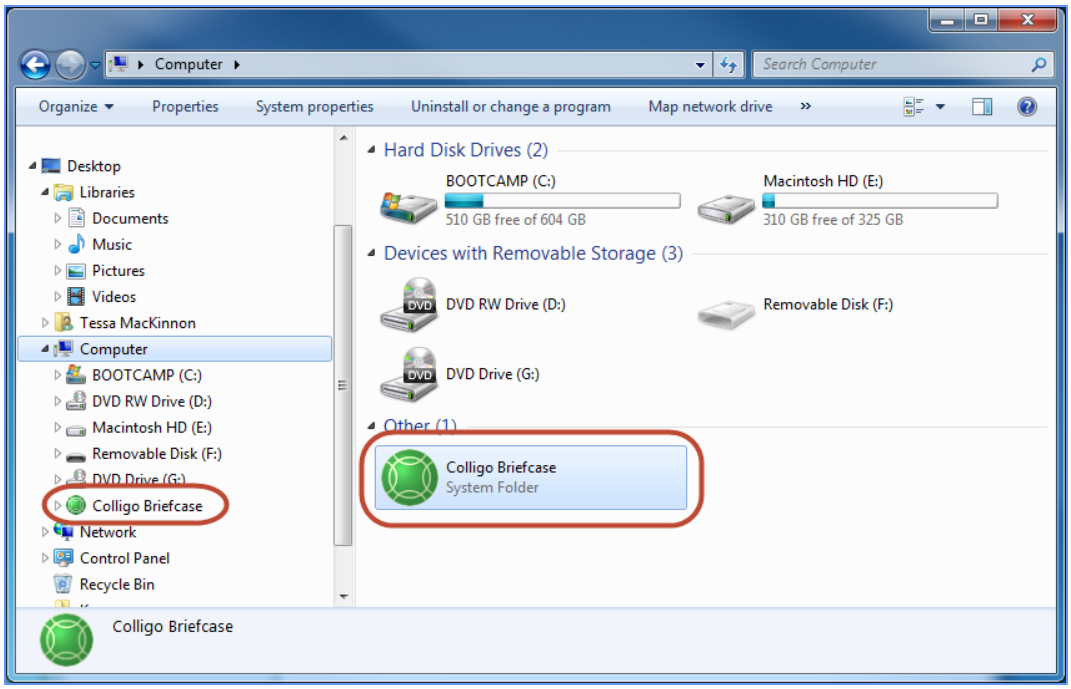


The Windows Explorer extension displays as **Colligo Briefcase** under the Computer node:



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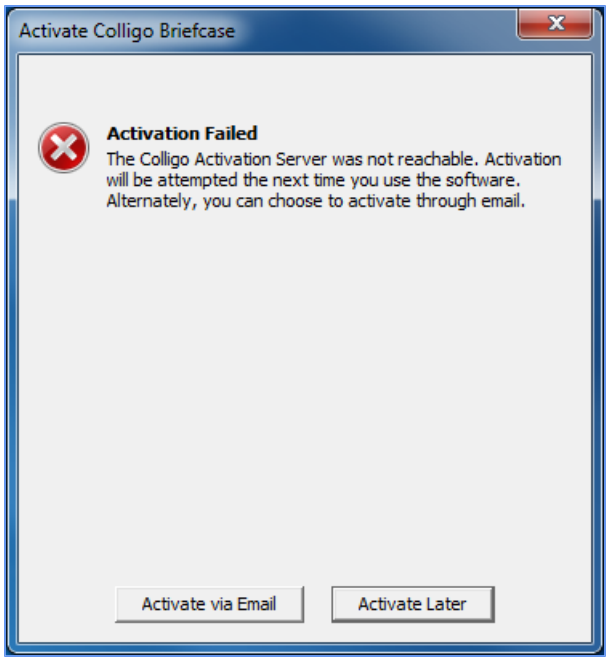
Installing and Activating Colligo Briefcase

To install and activate Colligo Briefcase:

1. Double-click to open the Colligo Briefcase XX.zip file and extract the contents.
2. In the folder, double-click the folder that corresponds with your operating system:
    a. **x86**: choose this option if you have a 32-bit operating system
    b. **x64**: choose this option if you have a 64-bit operating system
4. Double-click either Setup.exe or briefcase_xNN.msi.
5. Follow the steps in the install wizard.
6. After installation is complete, enter your information to activate the software.
7. If you are unable to connect to the activation server, an error message displays:



NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

8. Click **Activate by Email**.
9. On the following screen, click **Export Activation Request**.
10. Save the **ActivationRequest.txt** file in your preferred location.
11. Attach this file to your email and send to activation@colligo.com.

Checking for Updates

To check if you are using the most current version of Colligo Briefcase, select the **Help** menu and select **Check for Updates**.

The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

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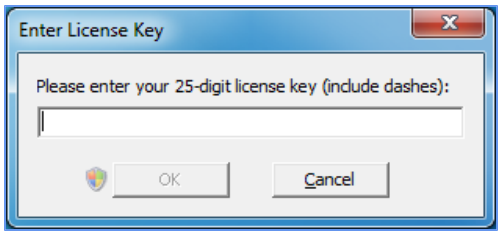
Updating Your License Key

To change your license key:

1. From the **Help** menu, select **Install License Key**.

   The **Enter License Key** dialog displays:



2. Enter your license key and click **OK**.

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ADDING SHAREPOINT SITES

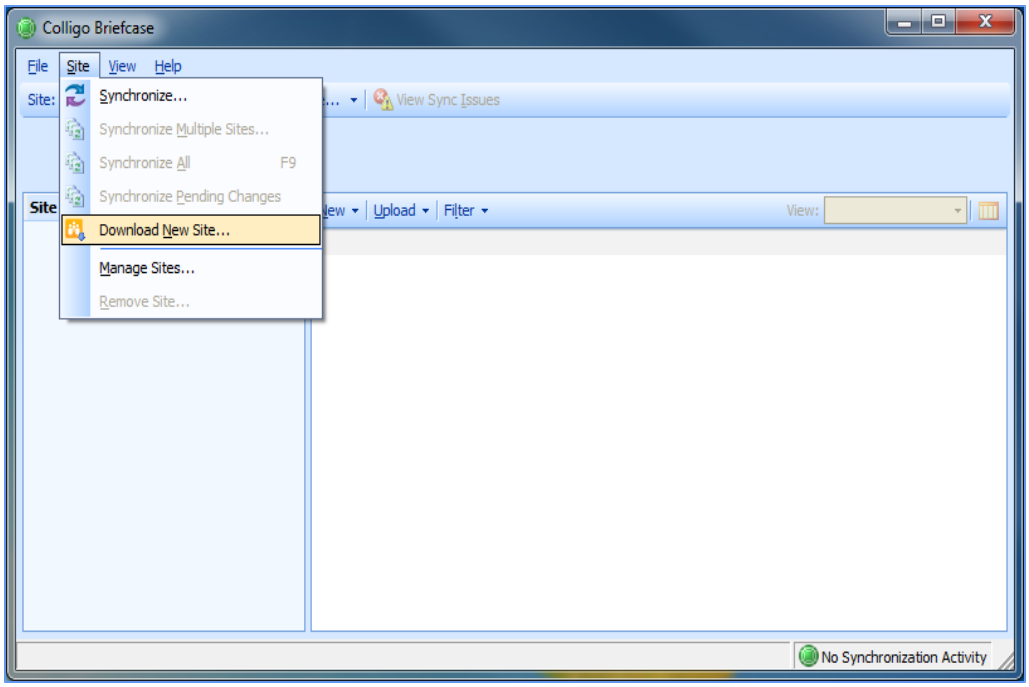
Colligo Briefcase lets you connect to SharePoint sites through both the stand-alone interface and the Windows Explorer extension.You can add a SharePoint list or library to Colligo Briefcase in one of two ways:

- Using the **Download New Site** option
- Using the **Connect to Briefcase** option in Internet Explorer

Using the Download New Site Option (Stand-alone Interface)

To connect a site from the Briefcase stand-alone interface:

1. From the **Site** menu, choose **Download New Site**:



The **Download New Site** dialog displays.

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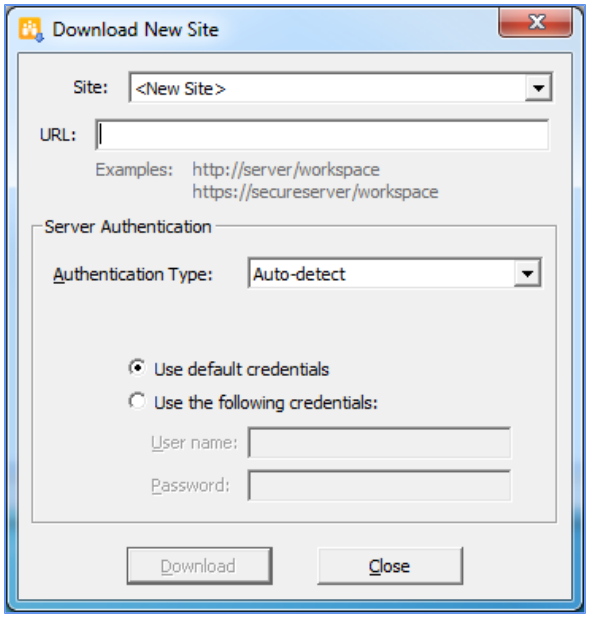
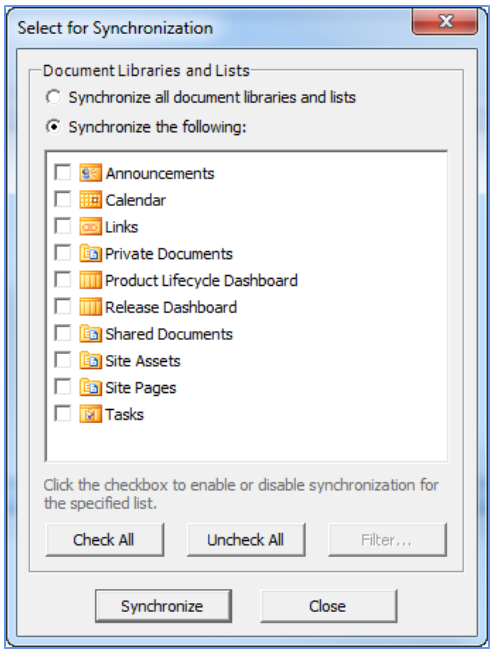


3. In the **Authentication Type** drop-down menu, choose one of the following options:
   - Auto-detect
   - Windows Classic
   - Windows Claim-based
   - Form-Based
   - ADFS 2.0
   - Office365
   - Office365 by Prompt
4. Select either your default credentials, or supply other user-specific credentials.
5. Click **Download**.

   The **Select for Synchronization** dialog displays the lists and libraries you have permissions for:



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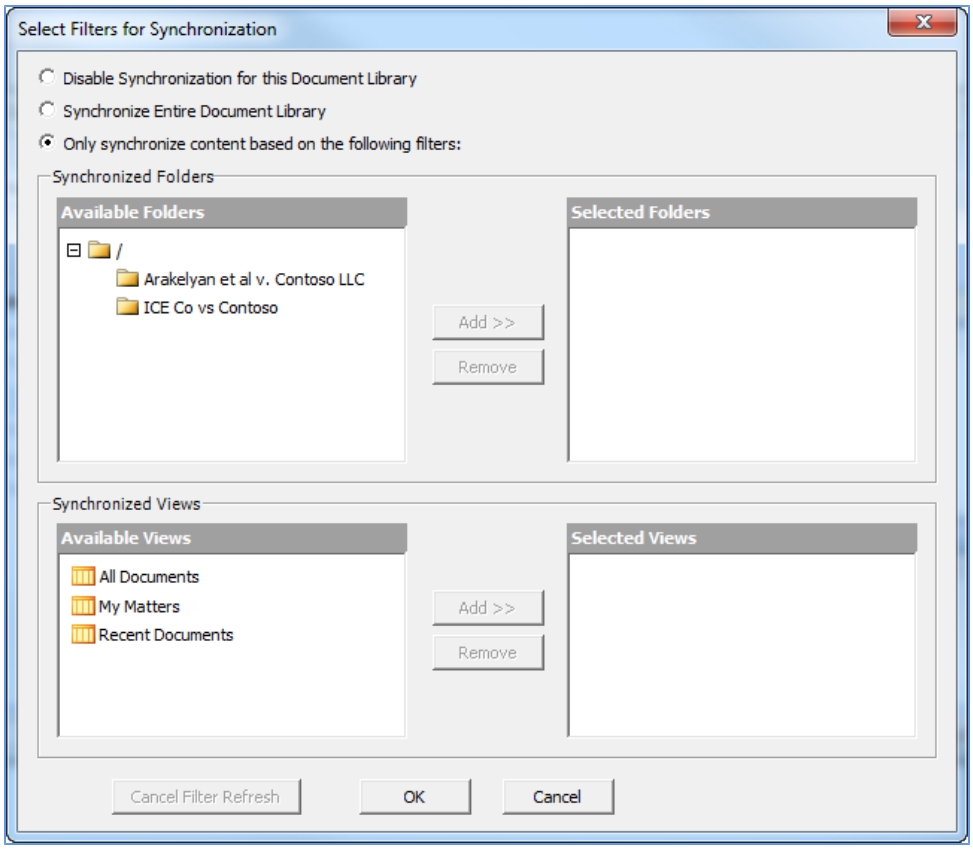
6. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
7. Click **Filter** to select which folders and views you want to synchronize.

The **Select Filters for Synchronization** dialog displays:



7. Choose from the following options:
   - **Disable Synchronization for this Document Library**: choose this option if you do not want the document library to be available offline.
   - **Synchronize Entire Document Library**: choose this option if want to synchronize everything in the specified document library.
   - **Only synchronize content based on the following filters**: choose this option if you want to selectively choose what folders and views are synchronized. In the Synchronized Folders and Synchronized Views sections, select a folder or view you want to synchronize and click **Add** to move it to the **Selected Folders/Views** column.
8. Click **OK**.
9. Click **Synchronize**. The site displays in Colligo Briefcase.

Using the Download New Site Dialog (Windows Explorer Interface)

To connect a site from the Windows Explorer interface:

1. Right-click the **Colligo Briefcase** node and select **Download New Site** from the contextual menu:

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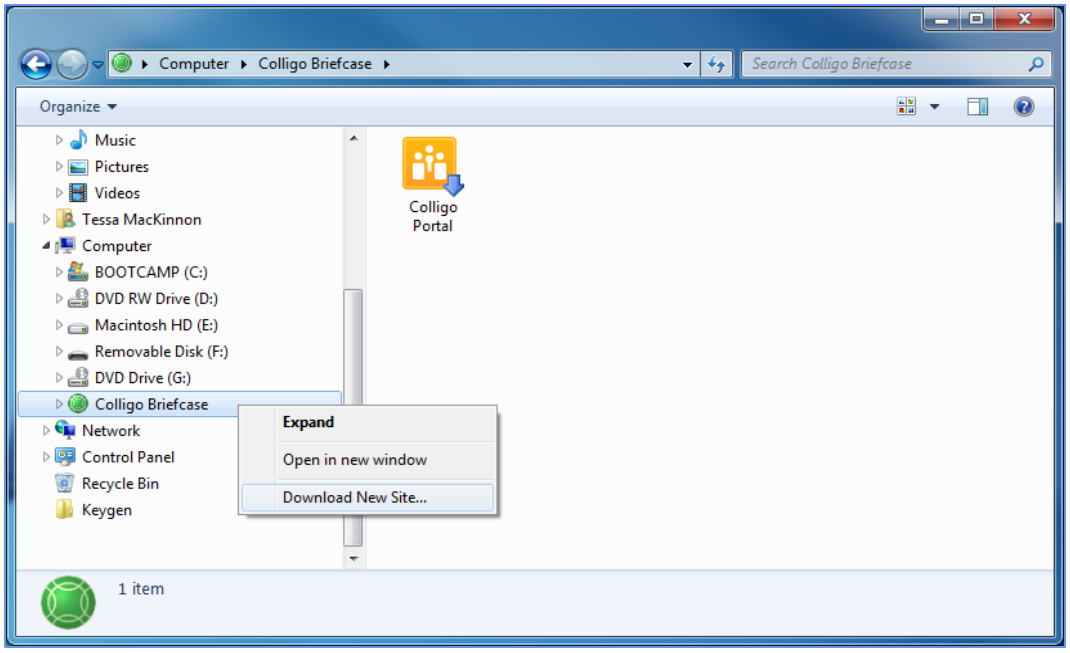

The **Download New Site** dialog displays.

2. Choose your Authentication Type and use your default credentials, or user-specific credentials.
3. Click **Download**.

   The site displays under the **Colligo Briefcase** node in Windows Explorer. However, the site's lists and libraries are not synchronized at this point and display as greyed out in Windows Explorer.

4. To synchronize a list or library, right-click it and select **Enable Synchronization**. To select filters for synchronization, right-click a list or library and select **Filter Synchronization**.

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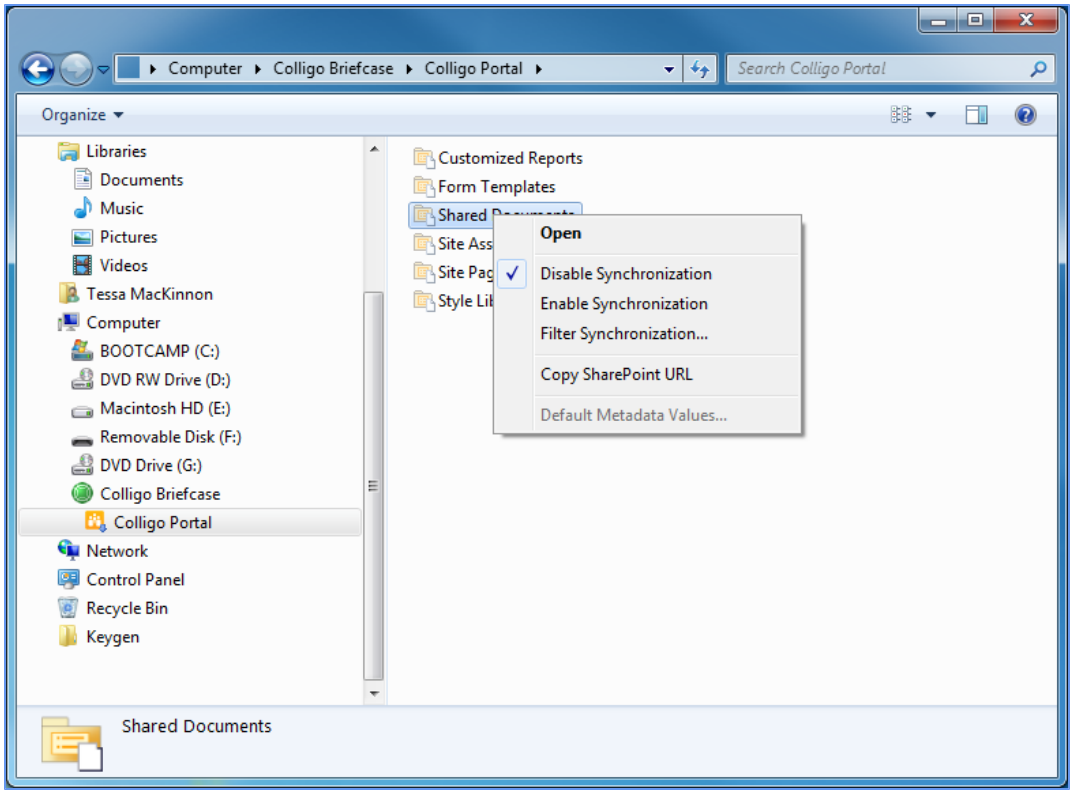
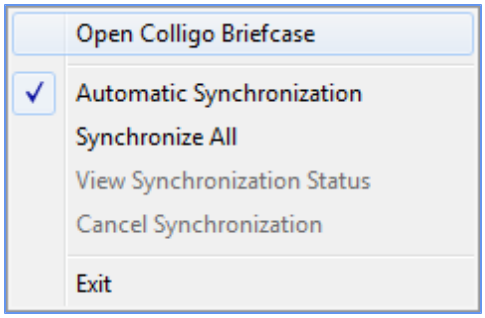


After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:

- Right-click the Colligo Briefcase icon in the system tray and choose Synchronize All:



- From the **Site** menu in the stand-alone Colligo Briefcase interface, choose one of the following options:
    - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the Synchronize Multiple Sites dialog, check your preferred sites and click Synchronize.
    - **Synchronize All**: choose this option to synchronize all sites
    - **Synchronize Pending Changes**: choose this option to synchronize changes you have made

Using the Connect to Briefcase Button

1. Navigate to a SharePoint List or Library in Internet Explorer.
2. Click the green **Connect to Briefcase** icon on the toolbar.

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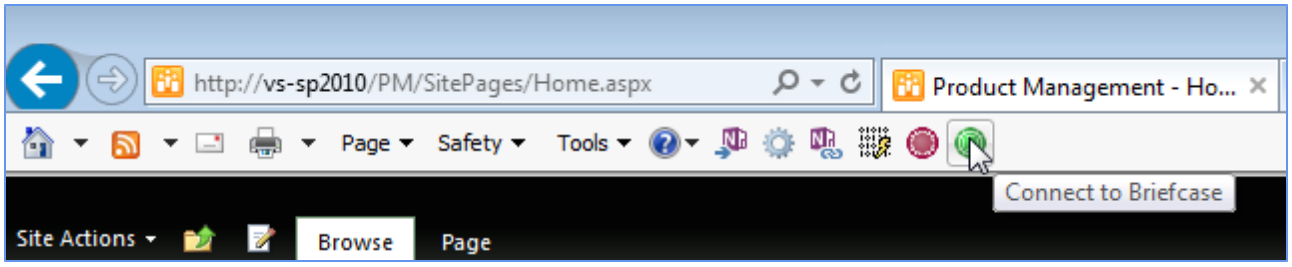
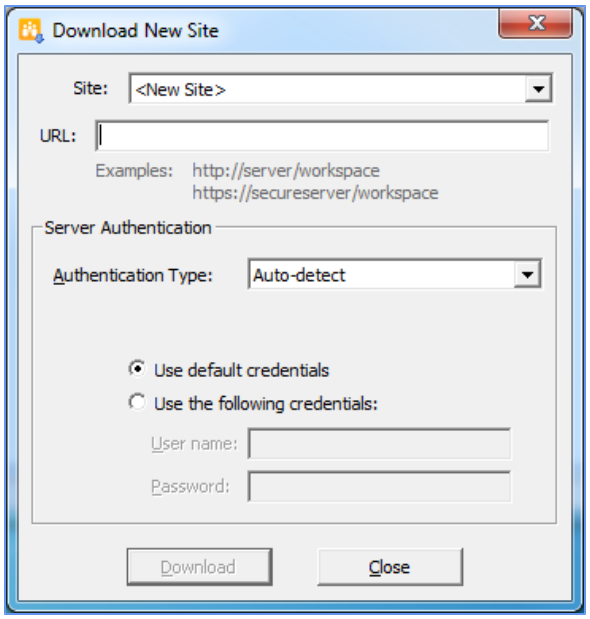


The **Download New Site** dialog displays.



3. In the **Authentication Type** drop-down menu, choose one of the following options:
   - Auto-detect
   - Windows Classic
   - Windows Claim-based
   - Form-Based
   - ADFS 2.0
   - Office365
   - Office365 by Prompt
4. Select either your default credentials, or supply other user-specific credentials.
5. Click **Download**.

The **Select for Synchronization** dialog displays the lists and libraries you have permissions for:

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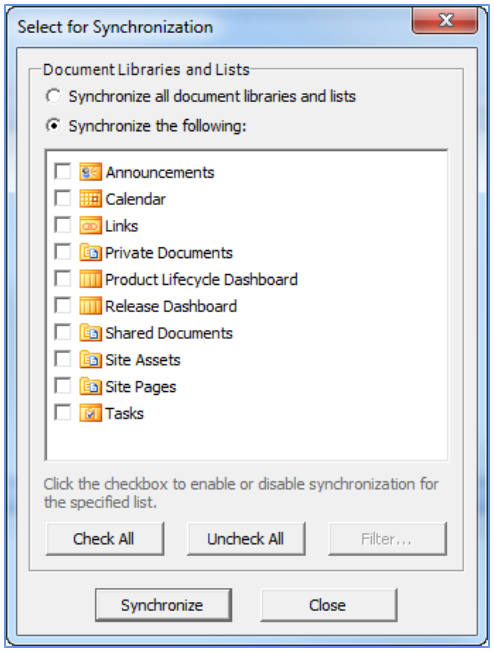
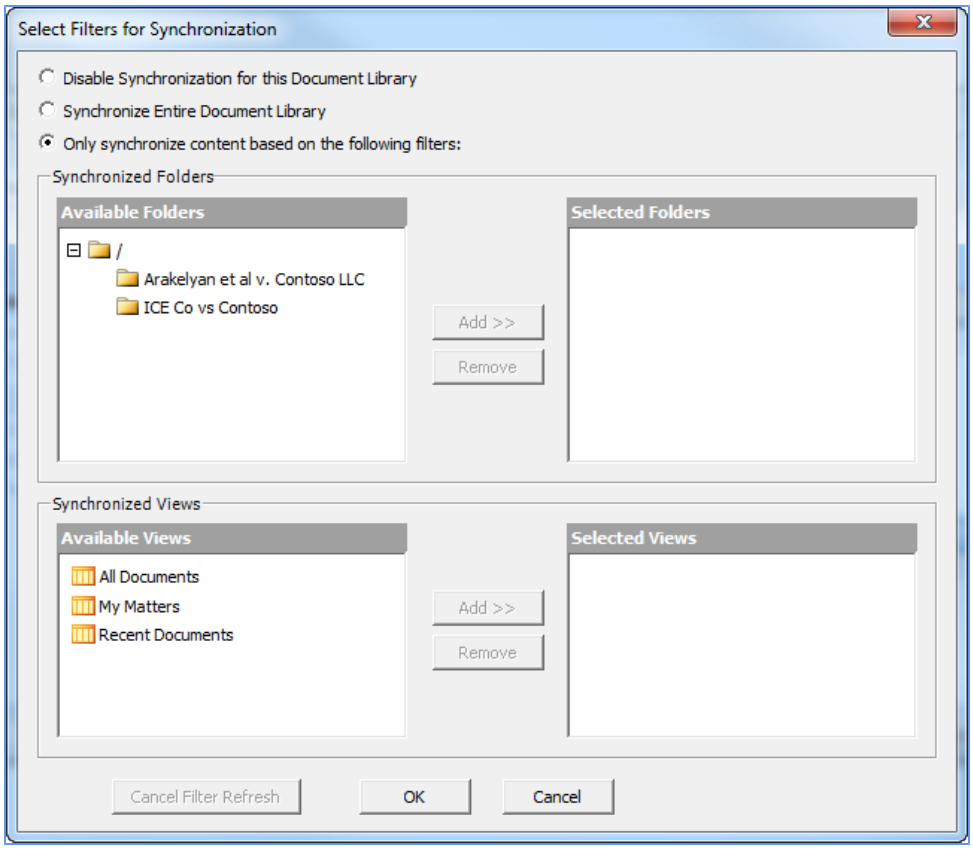


6. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
7. Click **Filter** to select which folders and views you want to synchronize.

The **Select Filters for Synchronization** dialog displays:



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7. Choose from the following options:
   - **Disable Synchronization for this Document Library**: choose this option if you do not want the document library to be available offline.
   - **Synchronize Entire Document Library**: choose this option if want to synchronize everything in the specified document library.
   - **Only synchronize content based on the following filters**: choose this option if you want to selectively choose what folders and views are synchronized. In the Synchronized Folders and Synchronized Views sections, select a folder or view you want to synchronize and click **Add** to move it to the Selected Folders/Views column.
8. Click **OK**.
9. Click **Synchronize**. The site displays in Colligo Briefcase.

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Editing Lists and Libraries

After you have added your site and chosen which lists and libraries you want to sync, you may want to go back at a later time and edit your choices.

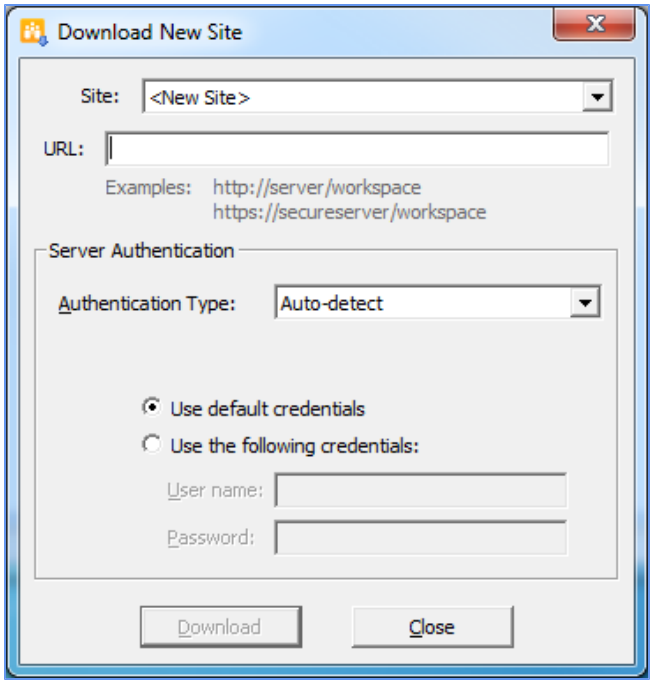
You can edit your lists and libraries in one of two ways:

1. Right-click a list or library and select **Enable Synchronization** from the contextual menu.
2. Synchronize the site.

OR

1. From the **Site** menu, choose **Download New Site**.

   The **Download New Site** dialog displays:



2. From the **Site** drop-down list, choose which site you want to configure.

   The **Synchronize Site** dialog displays:

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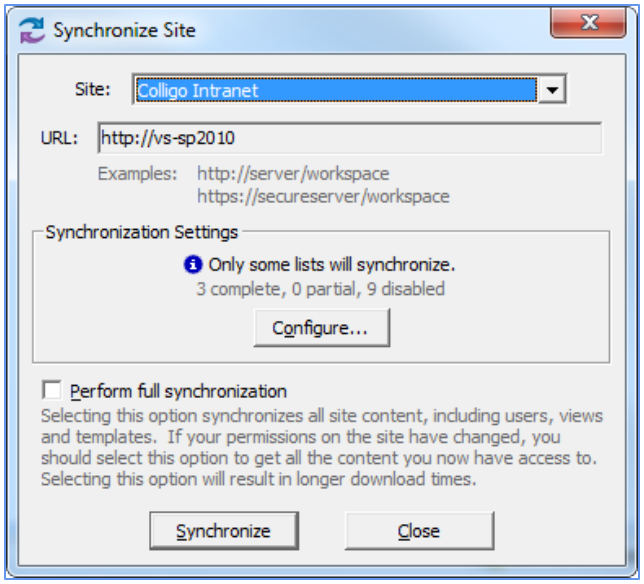


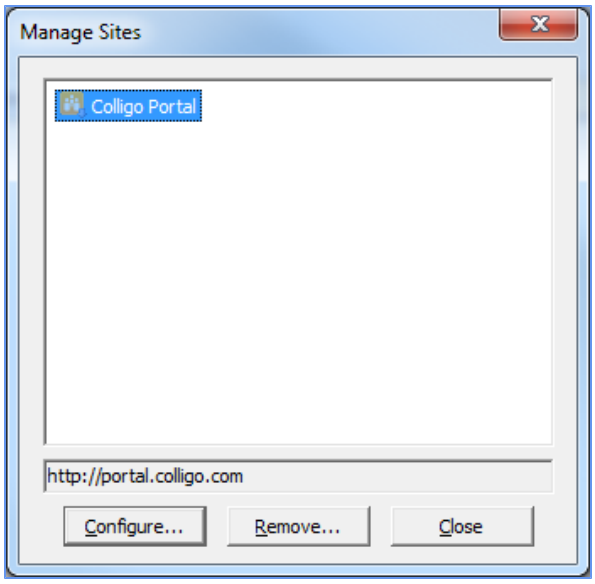
3. Click **Configure**.
4. In the **Configure Synchronization** dialog, choose which Lists and Libraries you want to sync.
5. Click **OK**.
6. Click **Synchronize**.

Removing a Site

To remove a site from Briefcase:

1. From the **Site** menu, choose **Manage Sites**.

   The **Manage Sites** dialog displays:



2. Select the site you want to remove and click **Remove**.

OR

1. Select the site you want to remove in the **Site** field:

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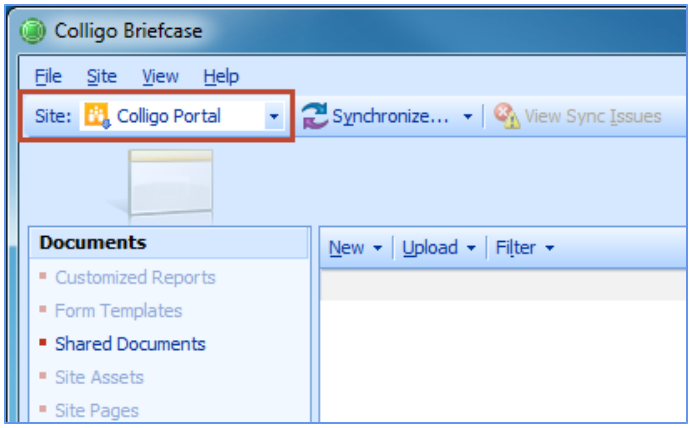
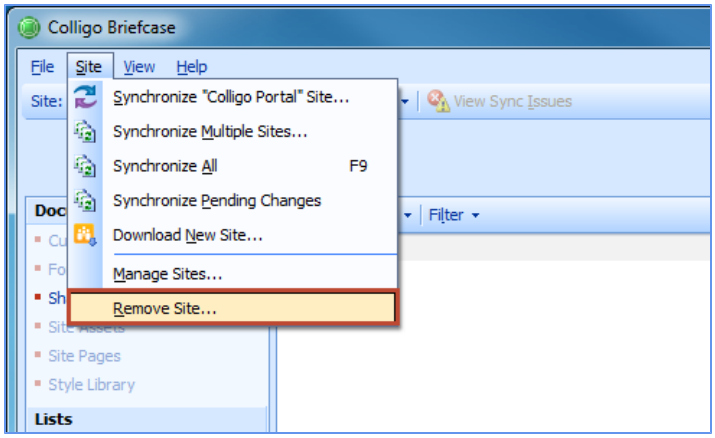


2. From the **Site** menu, choose **Remove Site**:



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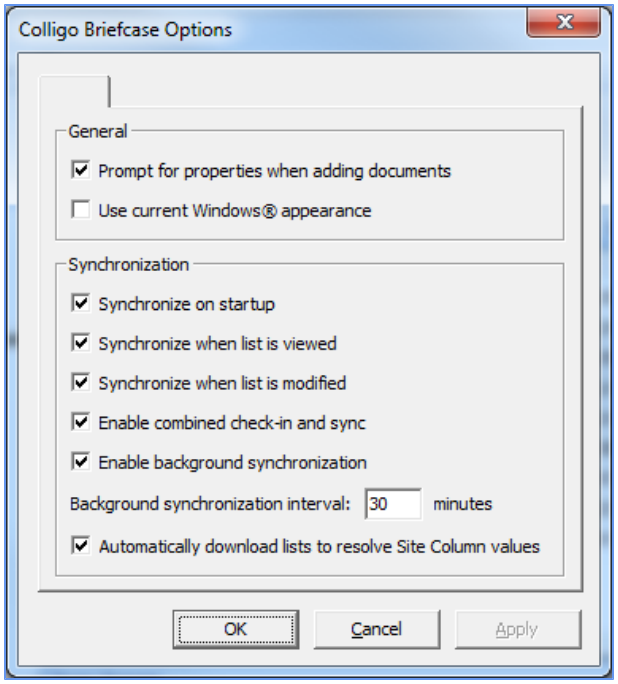
Setting Synchronization Options

In Briefcase you can set your Synchronization options to your lists and libraries sync automatically.However, you can also perform manual syncs as well.

Configuring Automatic Synchronization Options

1. From the **View** menu, select **Options**.

   The **Colligo Briefcase Options** dialog displays:



2. In the General section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring default metadata; see **Setting Default Metadata**.
3. In the **Synchronization** section, choose your preferred options:
   - **Synchronize on startup**: choose this option if you want your lists and libraries to synchronize every time Email Manager starts
   - **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time you view a list or library
   - **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time you modify a list or library
   - **Enable Combined check-in and sync:** choose this option if you want to both check an item in and sync it at the same time. If this option is not checked, the item remains checked out after the sync.
   - **Enable background synchronization**: choose this option if you want to set the synchronization to happen in the background on a time-specific basis, and enter your preferred time interval
   - **Automatically download lists to resolve Site Column values**: if you have lists that reference other lists (look-ups), checking this option ensures the related referenced lists are also downloaded

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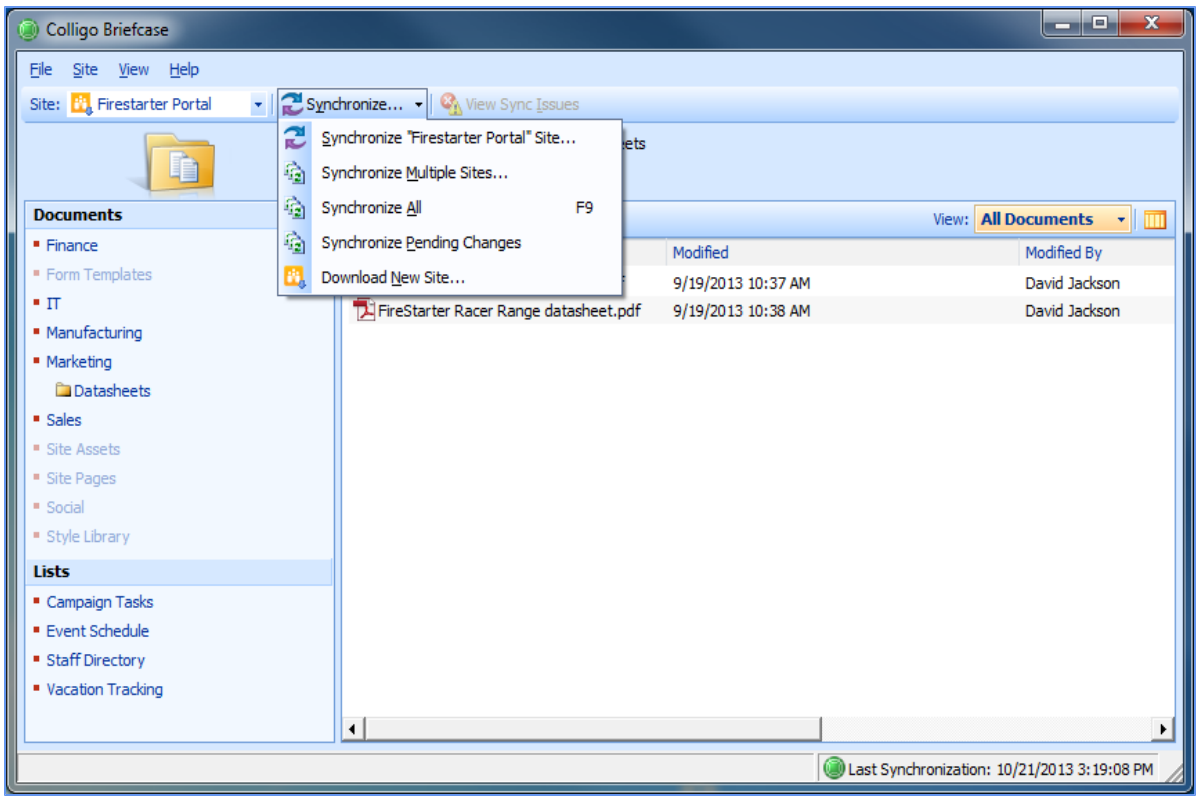
NOTE: Depending on how your IT Administrator has configured the installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

Synchronizing Sites Manually

After you have added your sites, you may want to synchronize them manually:

1. Click the **Synchronize** menu to display the options:



2. Choose from the following:
   - **Synchronize Site**: select this option to synchronize the site currently displayed
   - **Synchronize Multiple Sites**: select this option to display all sites and choose which ones you want to synchronize
   - **Synchronize All**: select this option to synchronize all sites
   - **Synchronize Pending Changes**: Select this option to synchronize any lists or libraries containing changed content

The **Synchronization In Progress** dialog displays for any of the above options:

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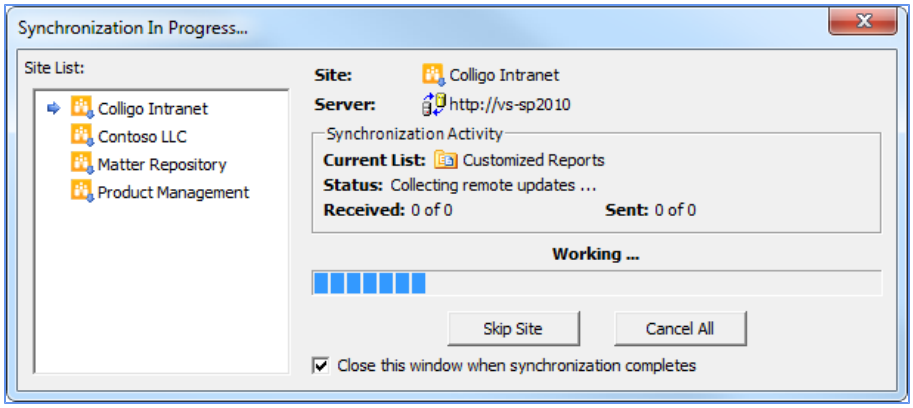

Viewing Pending Changes

When you are not connected to your SharePoint server, any changes and edits you make are listed in the **Pending Synchronization Changes** dialog. You can review the changes you've made before synchronizing them.

From the **View** menu, select **View Pending Changes**. The **Pending Synchronization Changes** dialog displays any items that will be synchronized the next time you are connected to the network. You have the option in this dialog to right-click an item and select discard if you want to revert the change.

Completing a Full Synchronization

Several of the synchronization dialogs have a **Perform Full Synchronization**option. This option means that additional information is downloaded, including definitions for Sites, Lists, Views, and Content Types, plus other site content that may not be retrieved during other standard sync processes.

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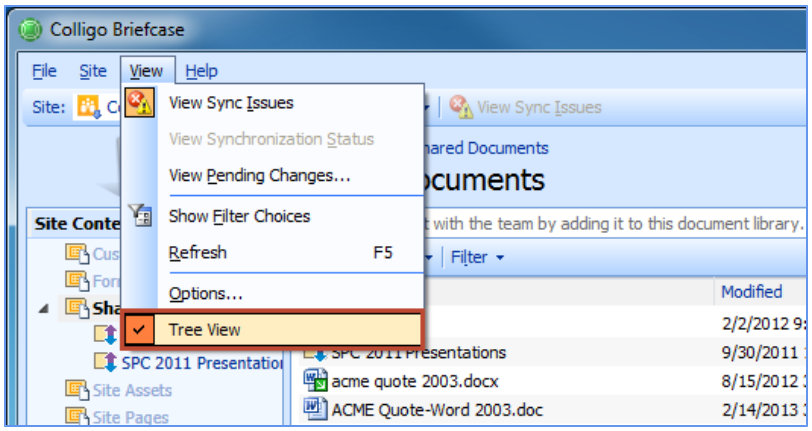
Viewing, Editing, and Creating New Content in Briefcase (Stand-alone Interface)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Briefcase interface.

The Tree View in the stand-alone interface allows you to view content more dynamically and to move and copy content between folders in the same SharePoint site using drag-and-drop. You can change the view by enabling or disabling the **Tree View** option in the **View** menu:



NOTE: you cannot enable or disable synchronization of document libraries or lists while Tree View is enabled. If you want to do this, you must turn off Tree View and work in List View.

NOTE: If the Tree View option is not available to you, it has been disabled by your IT Administrator.

Viewing Content

To view an item in a library/folder, double-click it. It opens in the program native to the item type. You can then edit the item if preferred.

If Tree View is enabled, you can expand and contract folders in the left pane to navigate to the SharePoint location you are looking for. The folder that is highlighted in the Tree View indicates the SharePoint location you are currently are viewing.

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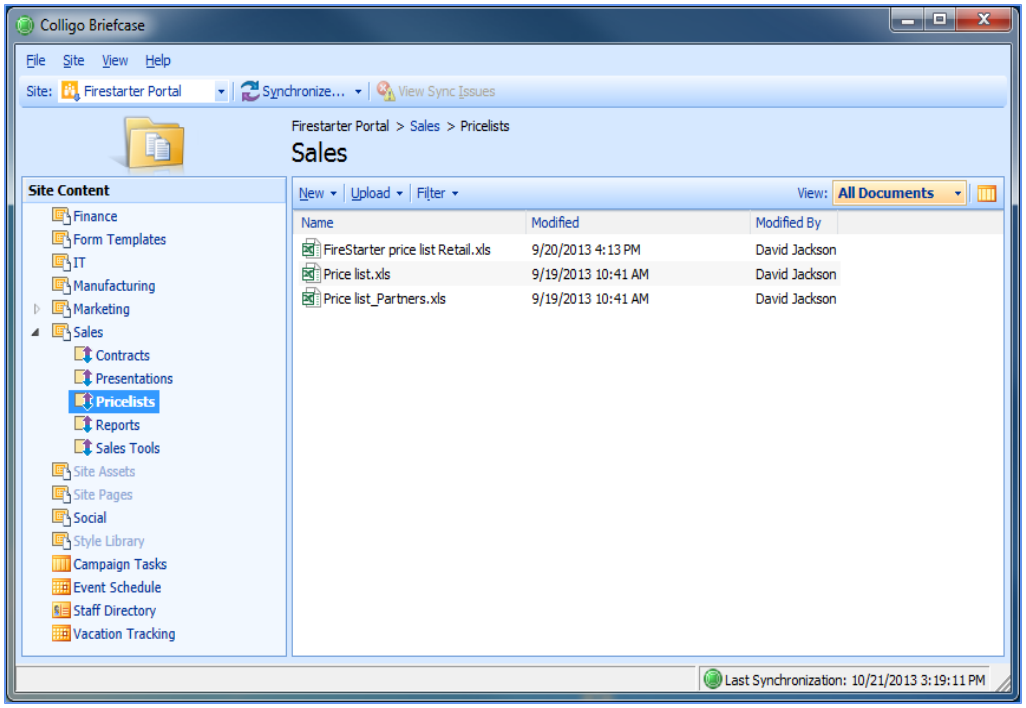
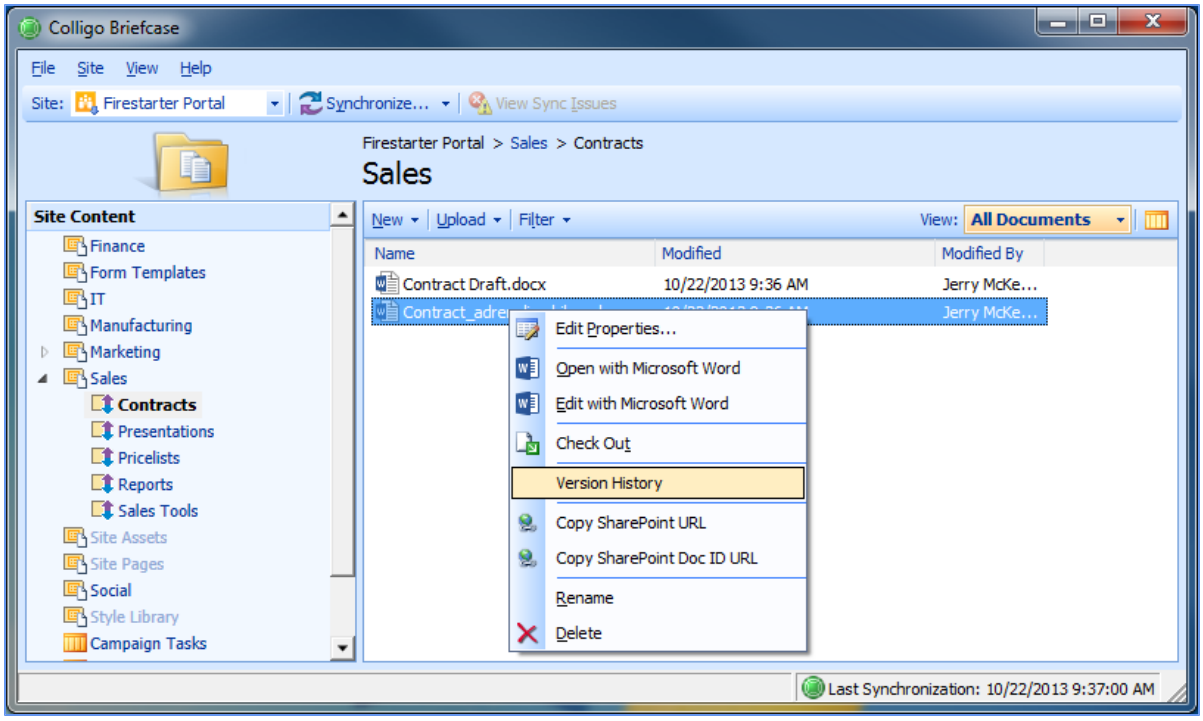


Viewing Item Version History

If a library has versioning enabled, you can view an item's version history by choosing the **Version History** option in the right-click contextual menu:



NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.

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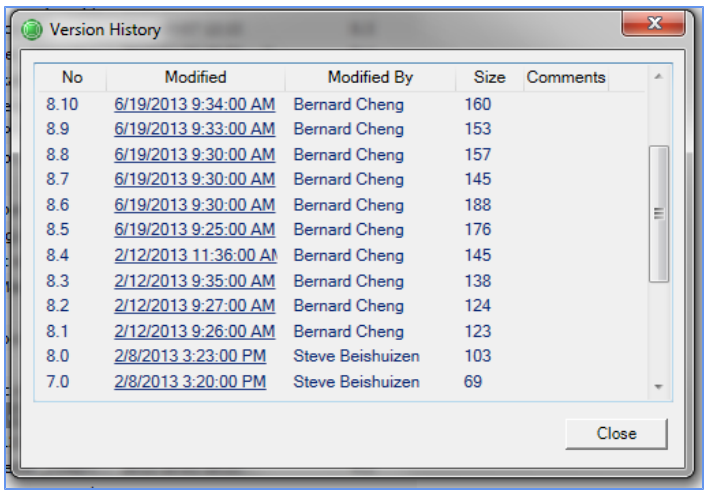
The **Version History** window displays:



Click on a version number to open the SharePoint version of the item.

Editing Content

To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If another user has opened the document, edited it, and uploaded it to SharePoint, and you try to upload the same document with your changes, the following dialog displays:

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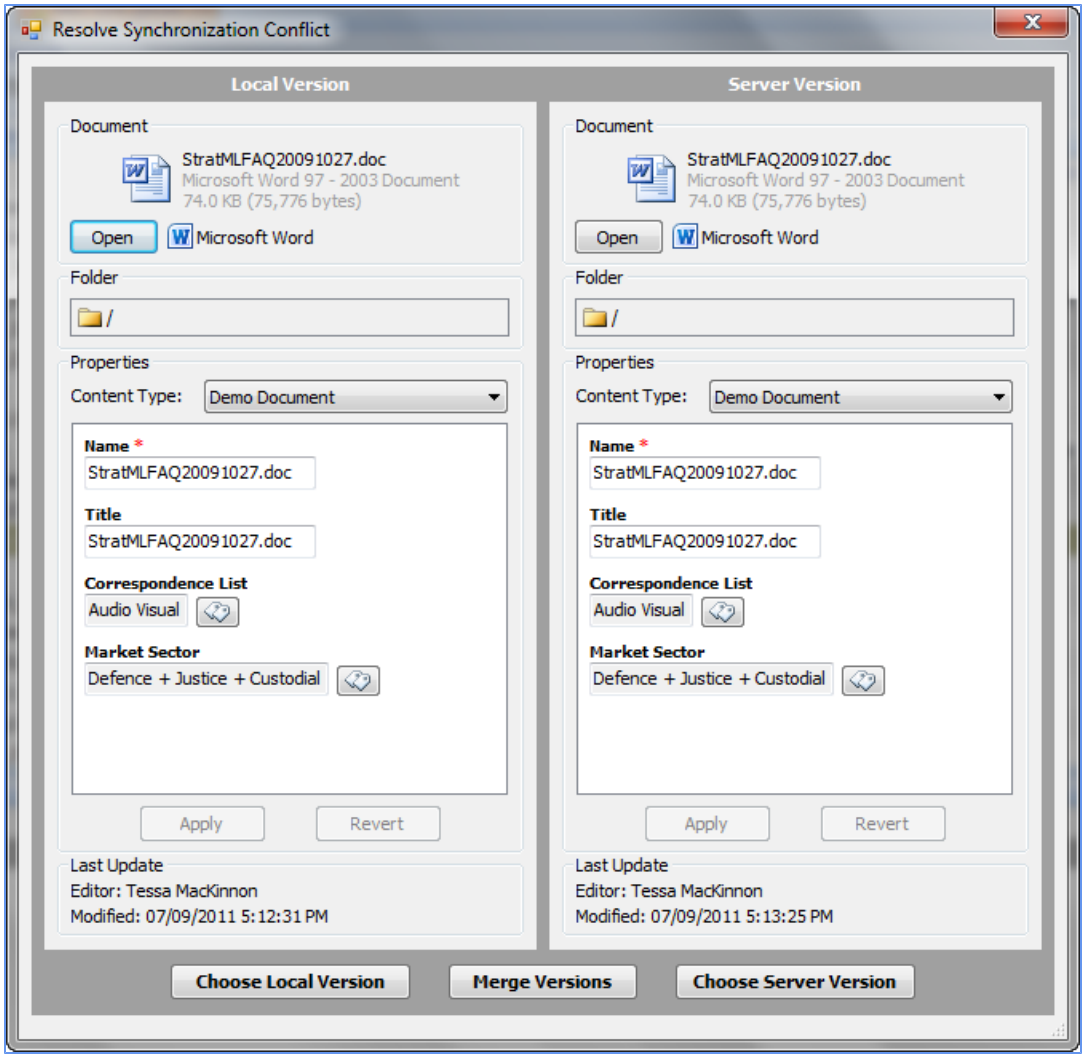

You can click **Open** to view the edits in each version, and then click one of the following options:

- **Choose Local Version**: if you choose this option, the version on your local machine overwrites the current version on SharePoint
- **Merge Versions**: If you choose this option, a wizard displays and walks you through a process to choose the changes you want to keep or discard
- **Choose Server Version**: if you choose this option, the version on SharePoint does not change; you are effectively discarding your version

Editing Item Properties

To edit the properties of an item:

1. Right-click the item and choose **Edit Properties**:

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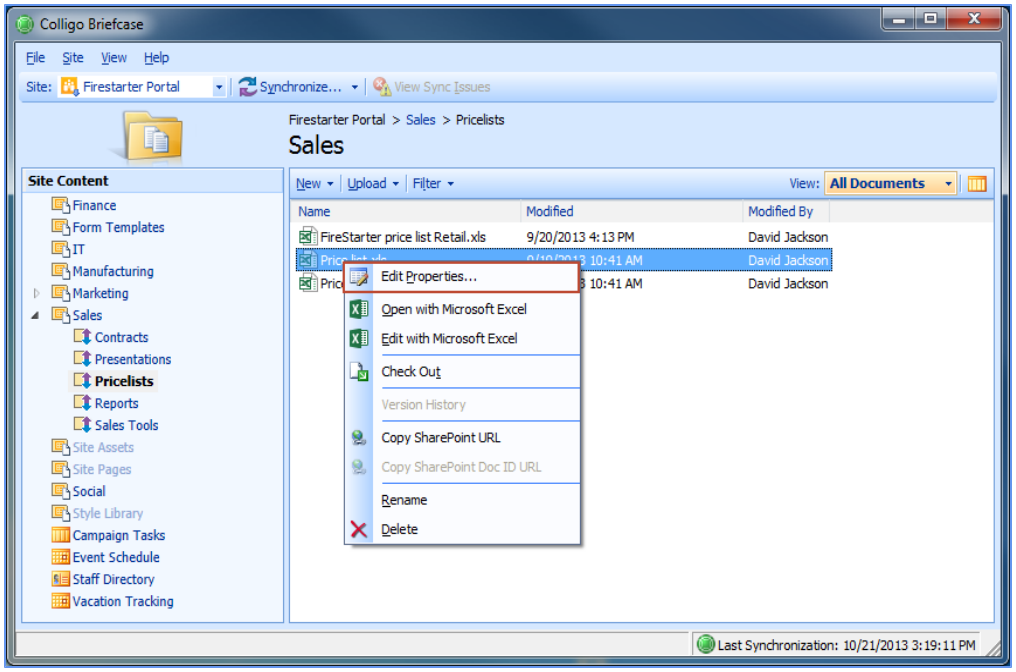


The **Edit Properties** dialog displays.

2. Edit as preferred and click **Close**.

   The changes are uploaded to SharePoint the next time the list/library is synchronized.

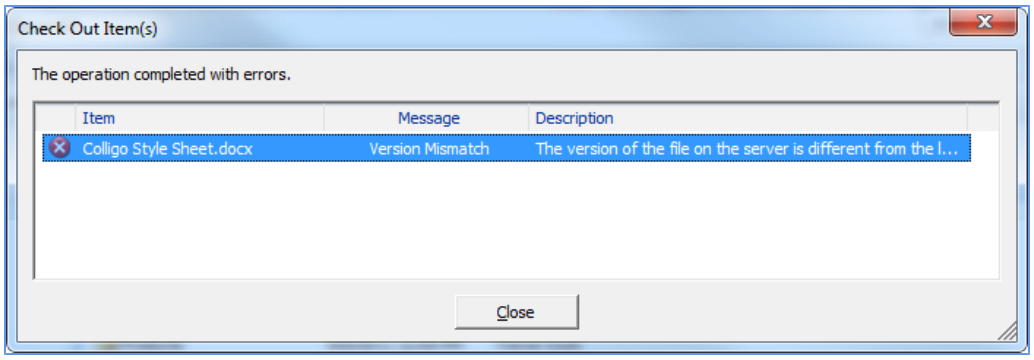
Checking Items In or Out

To check an item in or out, right-click it and choose **Check Out/In**. The **Check In** option only displays if you have previously checked the item out.

Once you have checked an item out, the Check Out icon is overlaid on top of the document type icon, so users can see that the item is being edited:

After you have checked the item out, you can open it, edit it, and then check it back in to the list/library. The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If you try to check out an item that has been modified in SharePoint and not synchronized, the following message displays:



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Close the dialog, synchronize the site so you have the most up-to-date version of the document, and then perform the **Check Out** operation again.

To avoid the above conflict, select the combined check-in and sync option as described in **Setting Synchronization Options**.

Renaming Items

To rename an item:

1. Right-click it and select **Rename**.
2. The item name becomes editable. Edit as preferred, and press **Enter** to complete the change.

   The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot rename an item if it is checked out by another user. If the item is checked out, a red Check Out icon displays on the item.

Deleting Items

To delete an item, right-click it and select **Delete**.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot delete an item if it is checked out by another user. If the item is checked out, a red check-out icon displays on the item.

Creating New Content

In addition to editing existing content in SharePoint, you can also add new content to your synchronized lists and libraries.

You can add items to Briefcase in one of the following ways:

- Create new documents from the Briefcase menus
- Upload existing content
- Drag-and-drop or copy-and-paste content

Adding a New Document to a List/Library

To add a new document to a list or library:

1. Select the list or library you want to add the document to and click the **New** menu and select your preferred document type from the drop-down list:

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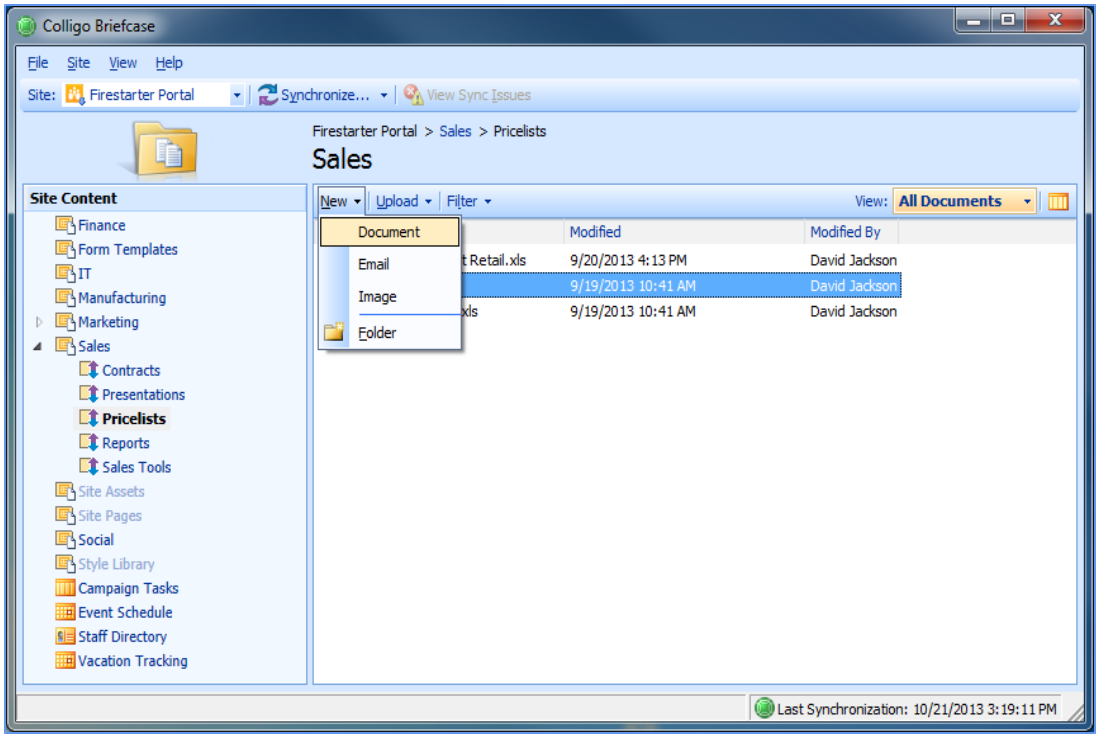
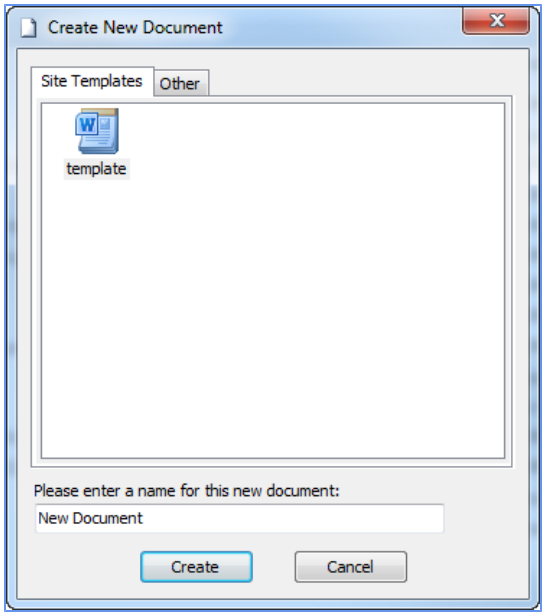


The **Create New Document** dialog displays:



2. Choose your document type from the **Site Templates** tab or the **Other** tab.
3. Enter a name for the document, and click **Create**.

   The **Edit Properties** dialog displays. This is where you can record information about the document that you are adding to SharePoint.

4. Edit the **Edit Properties** dialog as preferred.

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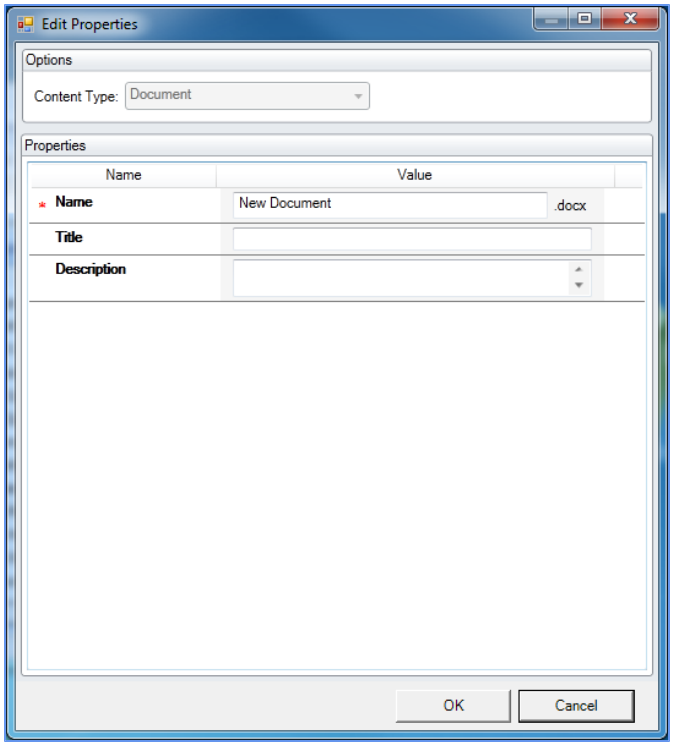

5. Click **Create**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

To add an existing document to a list or library:

1. With the list or library you want to add the document to selected, click the **Upload** menu, and choose **Upload Documents**:

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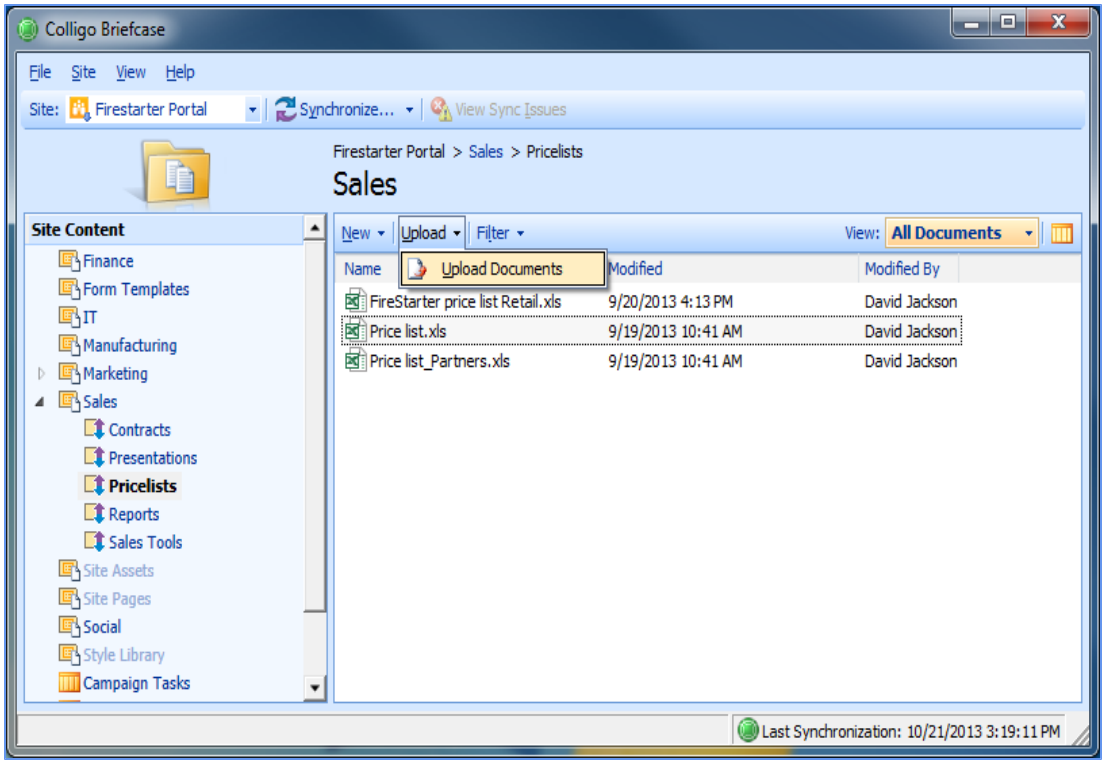

The **Upload Documents** dialog displays.

2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.
3. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.

The document is added to the SharePoint location. If you have selected more than one document, any properties you assign apply to all items.

Dragging-and-Dropping Content

You can drag-and-drop one or more files or complete folder structures into Briefcase from your desktop or from other directory locations.

1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in Briefcase .
2. The **Edit Properties** dialog displays. Edit as preferred and click **Create**. The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

Moving or Copying Content within SharePoint

You can move or copy content from one location in SharePoint to another location, through the Colligo Briefcase interface.

NOTE: this feature is disabled by default. Contact your IT Administrator.

1. Select one or more files in a library or folder, and drag-and-drop it to another folder.

   The **Edit Properties** dialog displays.

2. Edit as preferred and click **Create**.

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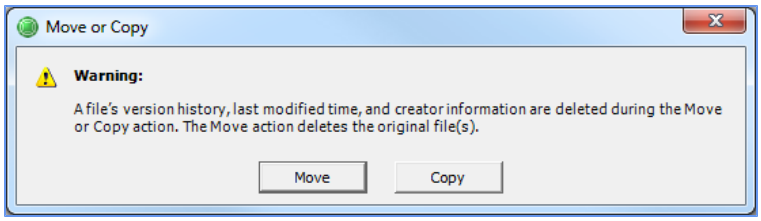
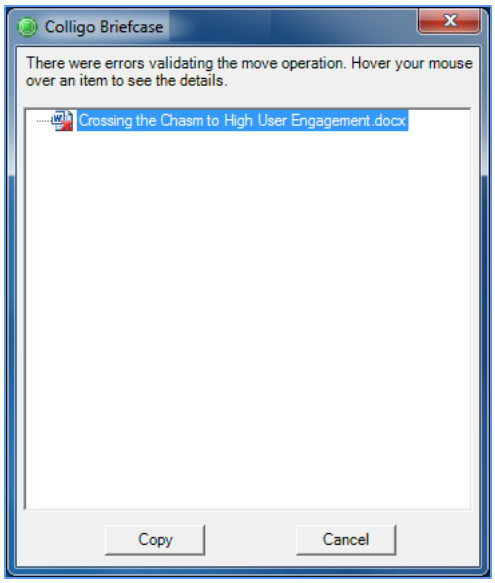
The following dialog displays:



3. Click **Move** or **Copy**. Note that no version history, timestamps, or original author information is preserved in either the Move or Copy action. If you choose to move an item, the original file is deleted. In addition, any metadata associated with the original file will not be preserved and you will need to enter new metadata for the item.

NOTE: You cannot move an item that is checked out by another user. If you attempt to do this, the following error message displays:



If you hover your mouse over the item, a message displays telling you who has the item checked out. That user needs to check the item back in before you can move the item.

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Viewing, Editing, and Creating New Content in Briefcase (Windows Explorer Interface)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Briefcase interface.

Viewing Content

To view an item in a library/folder, double-click it. It opens in the program native to the item type. You can then edit the item if preferred.

Editing Content

To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If another user has opened the document, edited it, and uploaded it to SharePoint, and you try to upload the same document with your changes, the following dialog displays:

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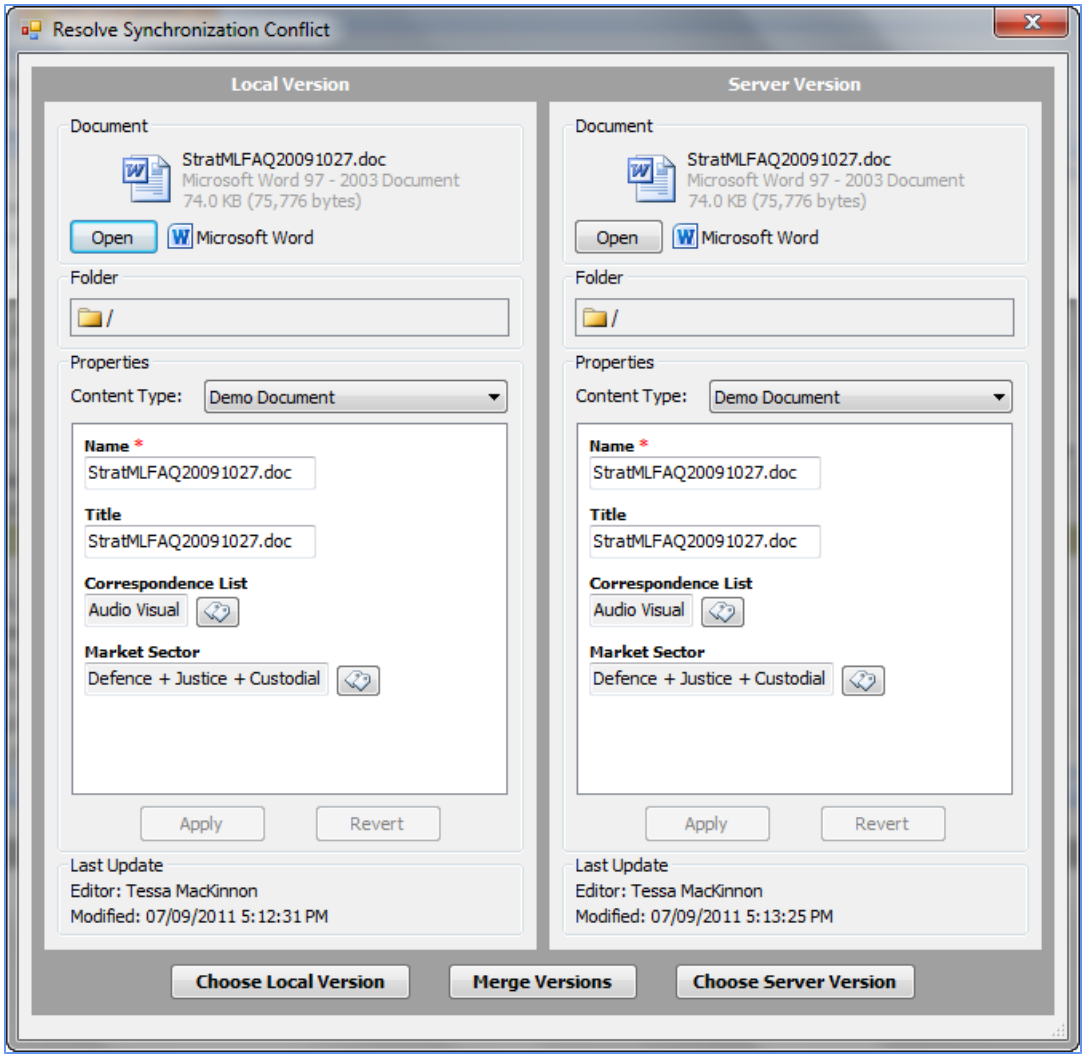

You can click **Open** to view the edits in each version, and then click one of the following options:

- **Choose Local Version**: if you choose this option, the version on your local machine overwrites the current version on SharePoint
- **Merge Versions**: If you choose this option, a wizard displays and walks you through a process to choose the changes you want to keep or discard
- **Choose Server Version**: if you choose this option, the version on SharePoint does not change; you are effectively discarding your version

Editing Item Properties

To edit the properties of an item:

1. Right-click the item and choose **Edit Properties**:

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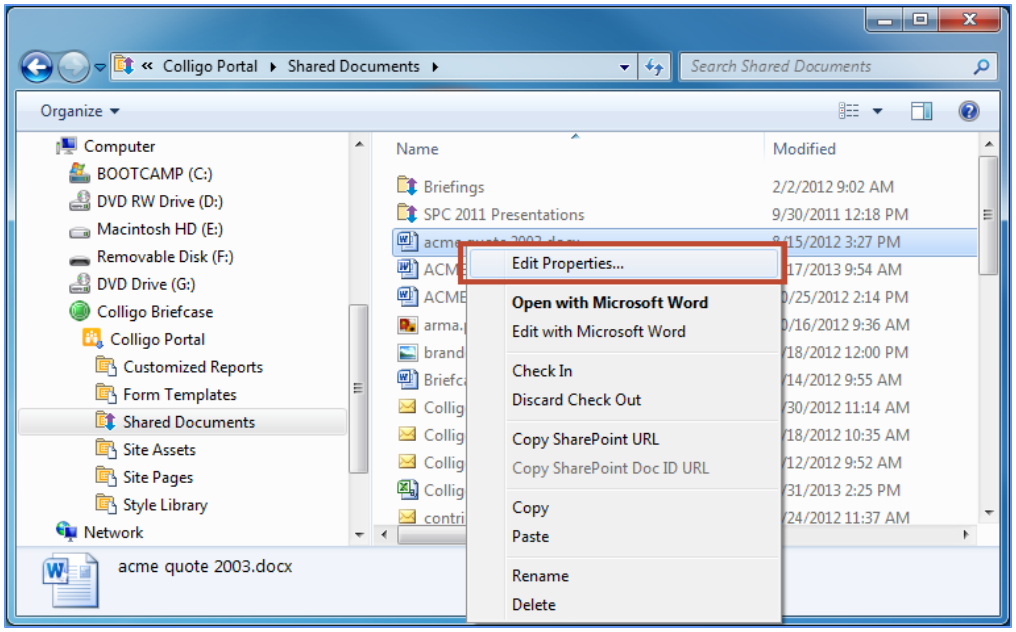


The **Edit Properties** dialog displays.

2. Edit as preferred and click **Close**.

   The changes are uploaded to SharePoint the next time the list/library is synchronized.

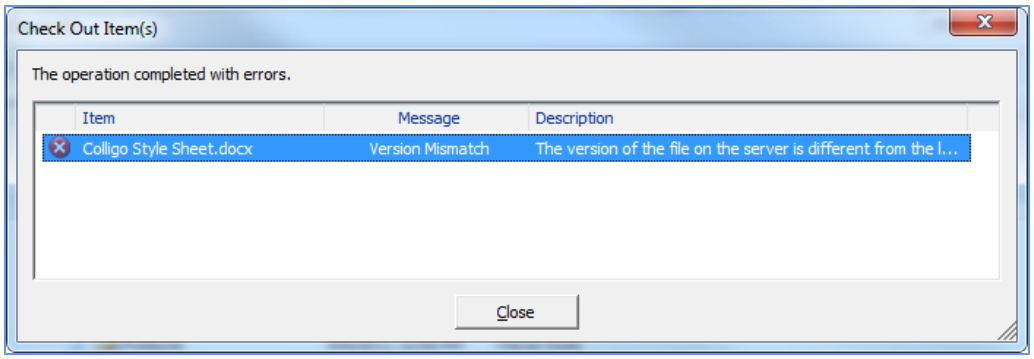
Checking Items In or Out

To check an item in or out, right-click it and choose **Check Out/In**. The **Check In** option only displays if you have previously checked the item out.

Once you have checked an item out, the Check Out icon is overlaid on top of the document type icon, so users can see that the item is being edited:

After you have checked the item out, you can open it, edit it, and then check it back in to the list/library. The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If you try to check out an item that has been modified in SharePoint and not synchronized, the following message displays:



Close the dialog, synchronize the site so you have the most up-to-date version of the document, and then perform the **Check Out** operation again.

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To avoid the above conflict, select the combined check-in and sync option as described in **Setting Synchronization Options**.

Renaming Items

To rename an item:

1. Right-click it and select **Rename**.
2. The item name becomes editable. Edit as preferred, and press **Enter** to complete the change.

   The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot rename an item if it is checked out by another user. If the item is checked out, a red **Check Out** icon displays on the item.

Deleting Items

To delete an item, right-click it and select **Delete**.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot delete an item if it is checked out by another user. If the item is checked out, a red check-out icon displays on the item.

Creating New Content

In addition to editing existing content in SharePoint, you can also add new content to your synchronized lists and libraries.

You can add items in the Windows Explorer extension of Briefcase in one of the following ways:

- Add a new document from within the Briefcase Windows Explorer interface
- Upload existing content
- Drag-and-drop or copy-and-paste content
- Use the **File > Save As** command

Adding a New Document to a List/Library

From within Windows Explorer, you can create and add a new document to a SharePoint location:

1. From the **File** menu, choose **New > New Document**:

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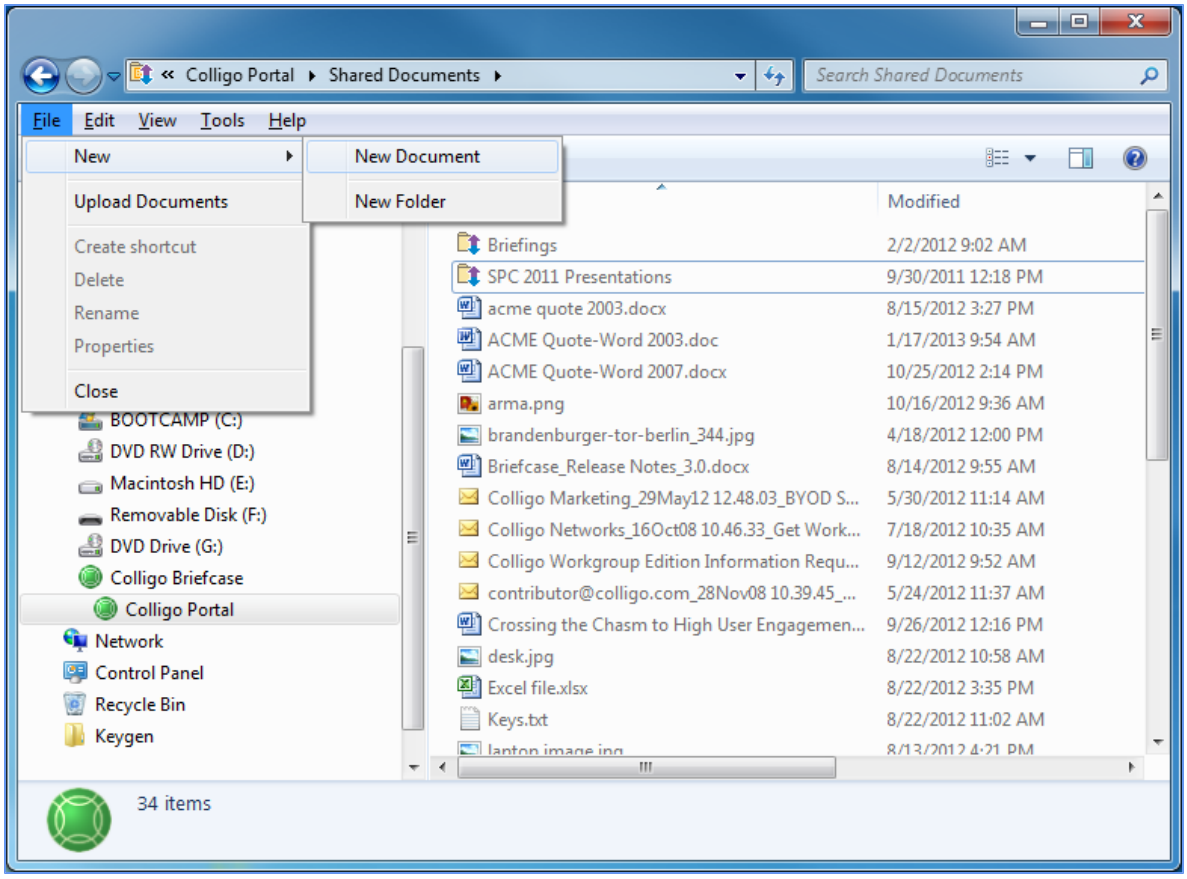
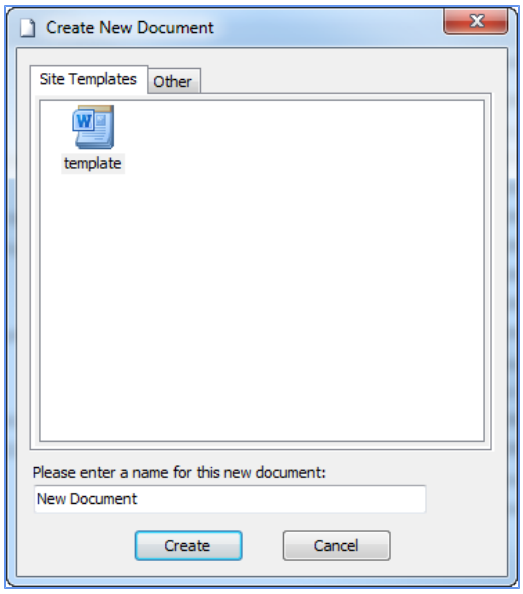


NOTE: if you cannot see the **File** menu, press **Alt** key to display it.

The **Create New Document** dialog displays:



2. Choose your document type from the **Site Templates** tab or the **Other** tab.
3. Enter a name for the document, and click **Create**.

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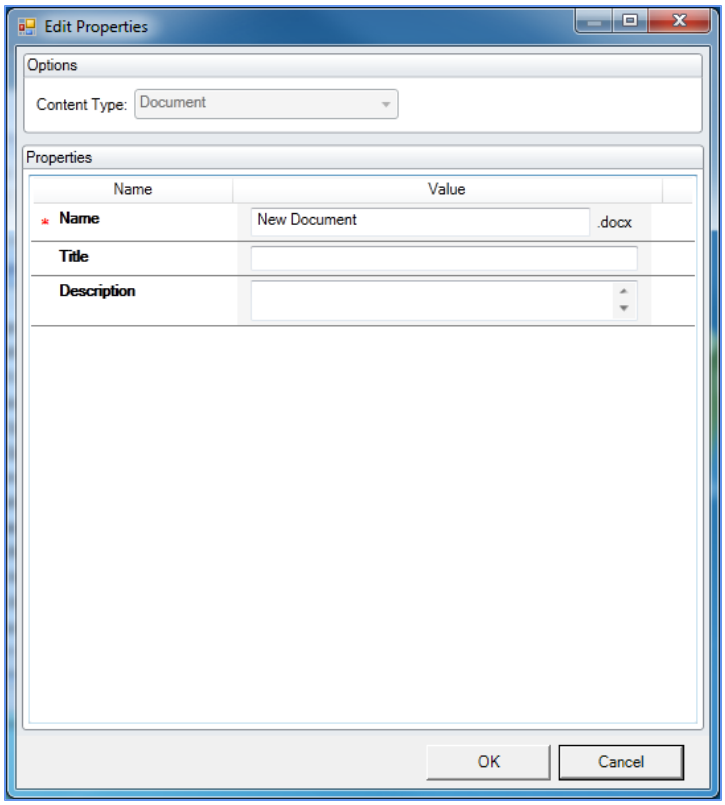
The **Edit Properties** dialog displays.



4. This dialog is where you can record information about the document. Edit as preferred.
5. Click **OK**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

From within Windows Explorer, you can upload existing documents to your preferred SharePoint location:

1. From the **File** menu, choose **Upload Documents**:

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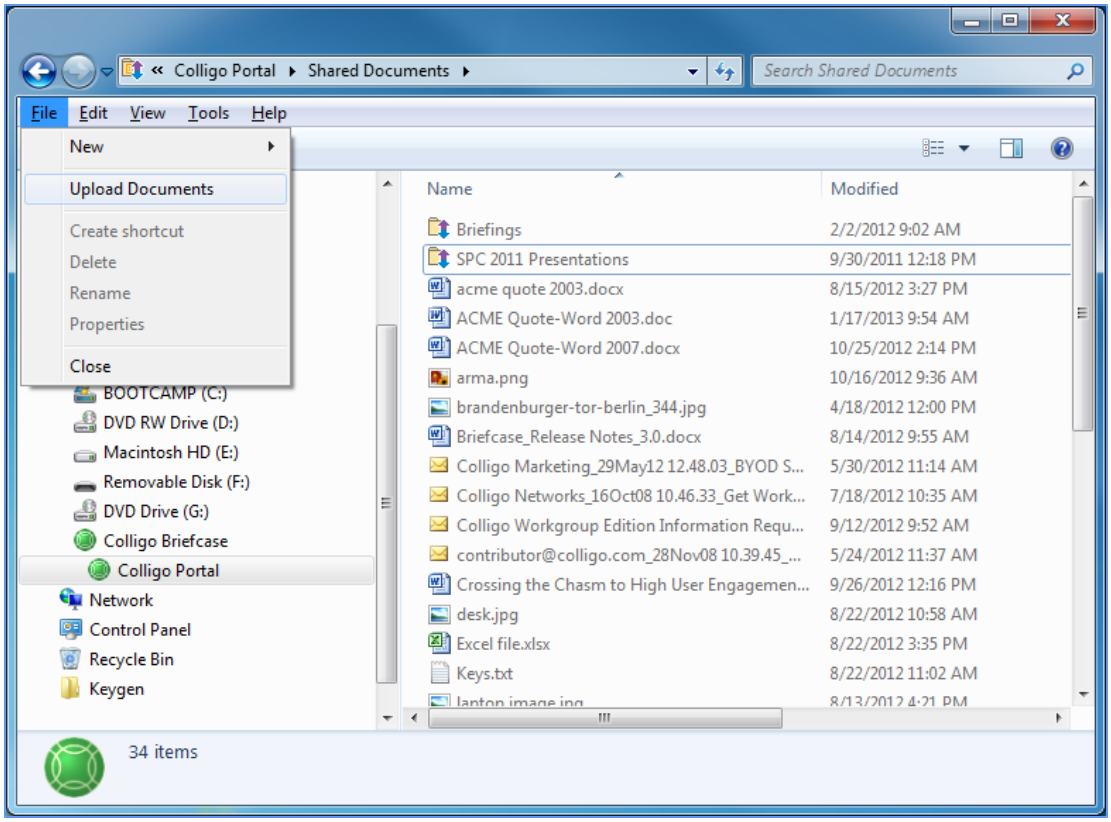

NOTE: if you cannot see the **File** menu, press the **Alt** key to display it.

The **Upload Documents** dialog displays.

2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.
3. The **Edit Properties** dialog displays. Edit as preferred and click **OK**.

   The document is added to the SharePoint location. If you have selected more than one document, any properties you assign apply to all items.

Dragging-and-Dropping Content

You can drag-and-drop one or more files or complete folder structures into File Manager from your desktop or from other directory locations:

1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in the Windows Explorer extension of Briefcase.
2. The **Edit Properties** dialog displays. Edit as preferred and click **OK**.

   The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

Using the File Save As Command

You can use the **File > Save As** command from integrated programs to save directly into any of the SharePoint lists or libraries you have connected to Contributor File Manager:

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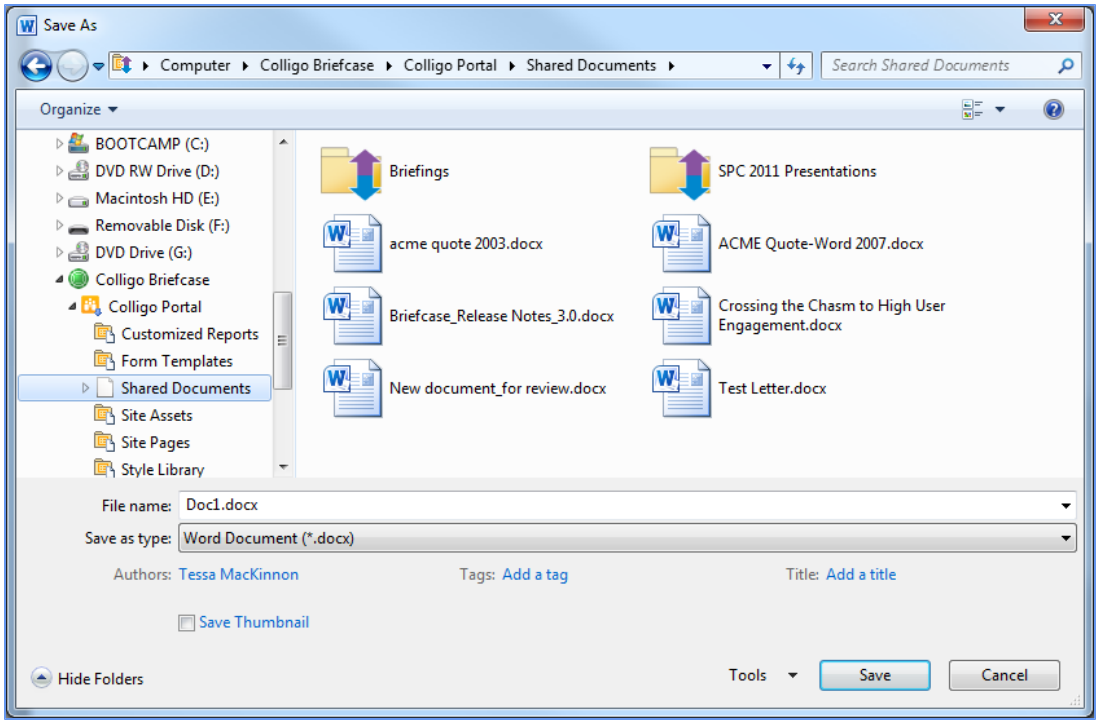
1. In your open document, select **File > Save As**.
2. In the **Save As** dialog, navigate to your SharePoint location, edit the file name as needed, and click **Open**:



3. The **Edit Properties** dialog displays. Edit as preferred and click **Close**.

The document is added to the SharePoint location.

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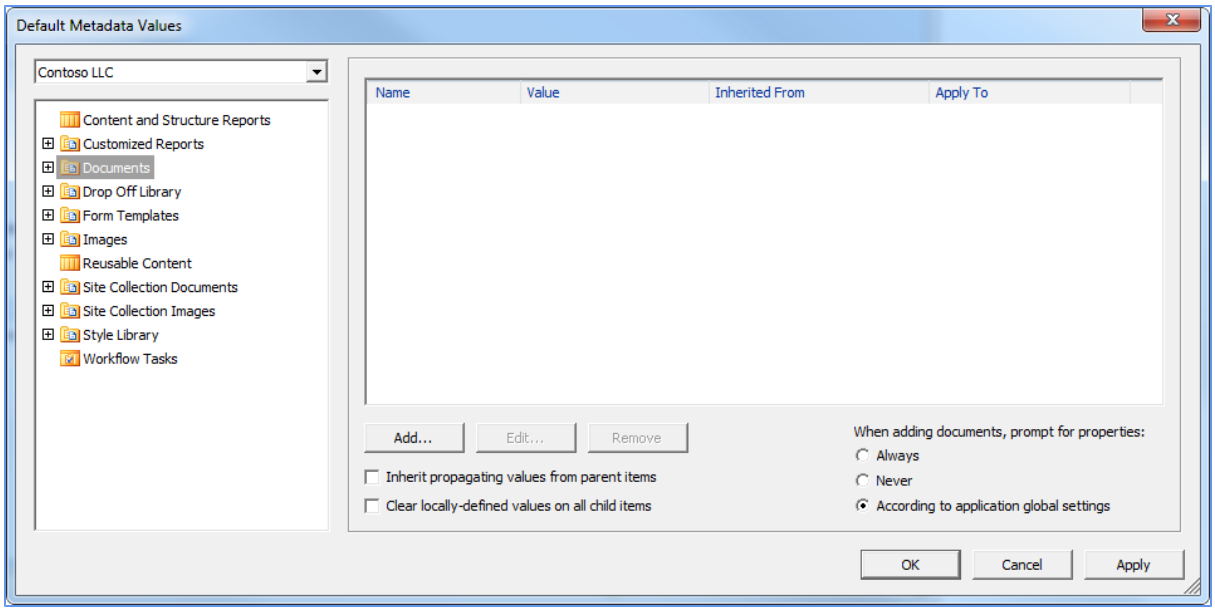
Setting Default Metadata

If you want to tag all documents and items that you add or upload to a list or library with the same metadata, you can set default metadata values through the Briefcase interface:

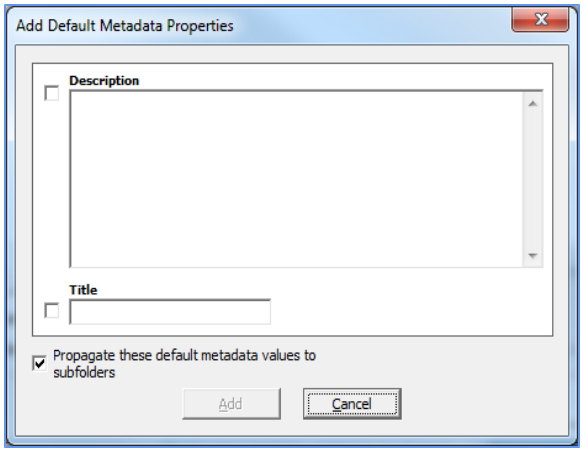
1. From the **File** menu, choose **Default Metadata Values**.

   The **Default Metadata Values** dialog displays:



2. Select the site and library/list that you want to configure.
3. To add a metadata tag, click **Add**.

   The **Add Default Metadata Properties** dialog displays, displaying the metadata field options that are set in the document library in SharePoint.



4. Enter your preferred tags and click **Add**.
5. If you want the values to propagate to any subfolders, check the **Propagate these default metadata values to subfolders** box.

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6. To configure the behavior or the prompt to record document properties, choose a radio button on the right under the When adding documents, prompt for properties section:
   - Always
   - Never
   - According to application global settings

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