Colligo Briefcase Enterprise

for Good Technology

User Guide
iPhone and iPod Touch

Table of Contents

Introduction

Welcome to Colligo Briefcase, the enterprise solution for SharePoint access from your iPad, iPhone, and iPod Touch.

The current release of Briefcase for Good supports one-way synchronization only. All content available is read-only. Users cannot edit existing items or upload new content to a SharePoint site, due to an issue in the Good Dynamics SDK. Two-way synchronization will be available in a future release.

Colligo Briefcase lets you securely store, sync, view, edit, and find SharePoint content on your iPad, iPhone or iPod Touch. Access and share files, lists, images, documents and emails. Synchronize SharePoint content to your iPad, iPhone or iPod Touch automatically, for instant access, even when offline. Colligo Briefcase is as easy to use as consumer file-sharing applications, encouraging SharePoint adoption while ensuring the security of your enterprise content.

- View SharePoint files directly on your iPad and iPhone, including Office (Word, Excel, Outlook, PowerPoint) documents, PDFs, images, emails and more
- Keep SharePoint content offline for fast access, even when you are not on the network
- Share files easily using links
- Find your content fast with powerful search
- Open and edit files in applications such as Documents to Go or GoodReader
- Upload files and photos to SharePoint (future)
- View and edit document and file properties, including metadata (future)
- Enter and submit InfoPath forms, with support for signatures (future)
- Choose content type and enter metatada when uploading items (future)

Secure access to Briefcase using passcode protection Extensive "smart caching" capabilities let you download only the content you need, reducing device storage requirements. Sync specific libraries or lists from SharePoint. You can also set alerts to monitor changes to files or folders in SharePoint. Colligo Briefcase works with your current SharePoint 2007, SharePoint 2010, or Office 365 sites, and doesn't require anything to be installed on the server.

Colligo Briefcase works seamlessly with all of Colligo's email management solutions for desktops, laptops, and smartphones, to provide the only unified, centrally-managed, enterprise-class solution for email and document management in SharePoint, including online and offline access, on-premise or in the cloud.

Good Dynamics

Colligo Briefcase for Good integrates with Good Dynamics to provide these additional capabilities:
- VPN-less access: no need to use a VPN to access corporate SharePoint sites that would otherwise require it
- End-to-end encryption of data in transit between mobile clients and application servers
- SharePoint data is stored on the device in a separate secure container, which can be remotely wiped by an admin without wiping the whole device
- Encryption with AES cypher technology, which protects both stored data and data that's travelling between the client and the server
- AppKinetics, Good Technology's patent pending application-to-application secure data exchange, ensures consistent and constant information protection as mobile apps communicate with one another.

- Data leakage prevention (copy/paste from Briefcase to other applications is disabled and "Open In" functionality is locked down to other Good Dynamics applications)
- Enforcement of password policies
- Tools to enable enterprises to deploy Briefcase for Good to users quickly and easily.

Benefits

- Provides a quick and easy-to-understand touch interface to SharePoint
- Ensures access to the very latest documents and information
- Reduces distribution of paper documents
- Keeps mobile users productive
- Gives offline access to documents, reducing network and data plan usage
- Allows mobile workers to fill in and submit electronic forms, reducing the need for paper-based forms and expediting business processes
- Reduces the need for laptops for document viewing and presentations
- Drives user adoption of SharePoint by improving ease of use

Devices Supported

NOTE: All devices require iOS6 or higher for Briefcase for Good

- iPad (1st generation or higher) or iPad Mini with WiFi (3G/4G optional)
- iPod Touch 4th Generation
- iPhone 3GS and above

SharePoint Platforms Supported

- SharePoint 2013
- SharePoint 2010
- SharePoint 2013 Online (Office 365)
- SharePoint 2010 Online (Office 365)
- SharePoint 2007 (MOSS and WSS 3.0)

Colligo Administrator

Colligo Briefcase for Good works seamlessly with Colligo Administrator, a server-based console tool for the configuration and management of Colligo's desktop and mobile applications. Colligo Administrator enables organizations to:

- Centrally configure all Colligo Briefcase user settings on the iPad/iPhone/iPod
- Push out SharePoint sites and document libraries with zero user interaction
- Monitor SharePoint and Colligo Briefcase usage via reports and metrics (future)
- Reduce deployment time and streamline the provisioning of enterprise iPads/iPhones/iPods

Overview

This user guide explains how to use Colligo Briefcase for Good on iPhone and iPod Touch. View the user guide in Colligo Briefcase on an iPad for instruction on how to use Colligo Briefcase on iPad.

In the rest of this document, references to "Colligo Briefcase" shall be understood to refer to Colligo Briefcase for Good.

Colligo Briefcase for Good Technology

If you have Colligo Briefcase for Good, you do not need to use VPN to access corporate sites that would normally require this.

Your IT administrator can configure the app so the following may be true:

- A user password may be required with specific requirements around the characters and occurrences of the password.
- Your password may be required every time you launch the Briefcase app.
- Copy and paste functionality from Briefcase to other applications may be disabled.

When you first launch Colligo Briefcase for Good, the following screen displays:
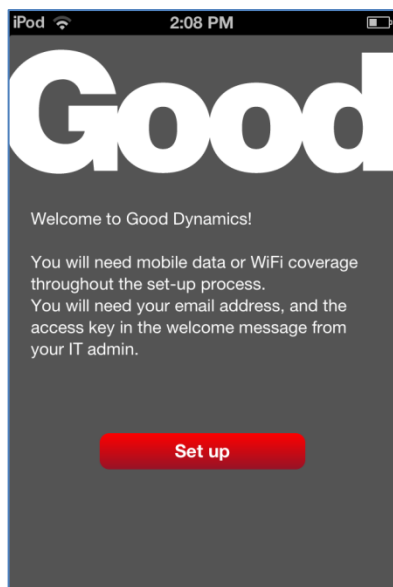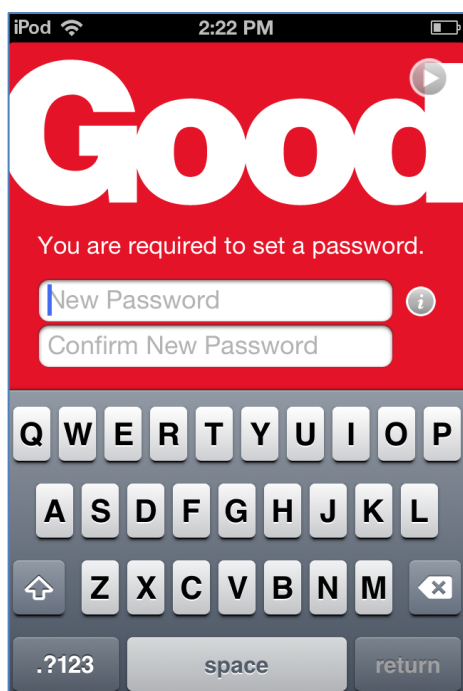

1. Tap **Set up**.

The following screen displays:
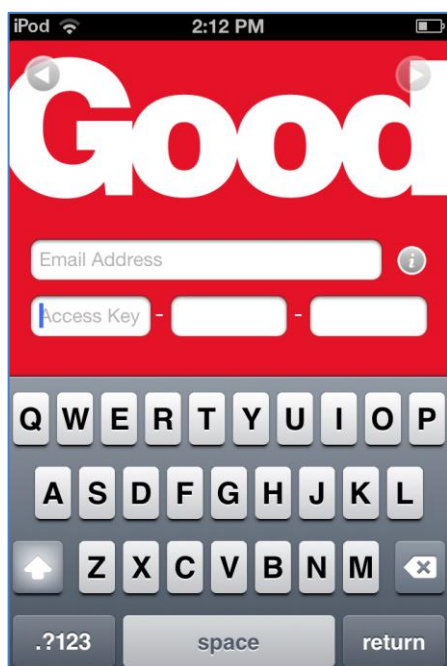
2. Enter your email address and the 15-digit access key contained in the email you received from the Good Mobile Administrator.
3. The next several screens display the activation of your installation.
4. The final screen asks that you create a new personal password:

5. Each time you launch Briefcase you will need to enter this password.
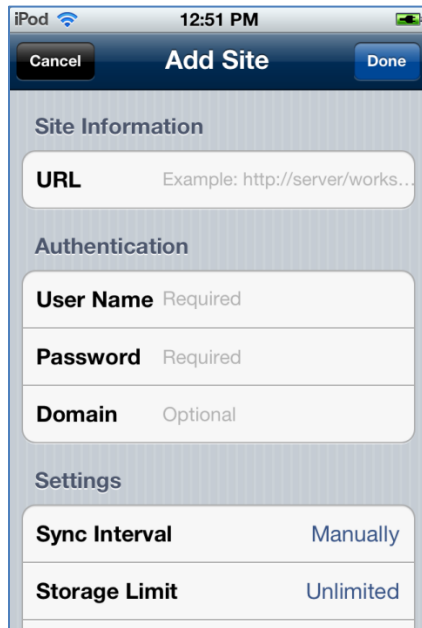
Managing SharePoint Sites

Colligo Briefcase lets you add, edit, and remove SharePoint sites.

Adding a Site

1. Tap the site icon [icon] to display your list of sites:

2. Tap the plus icon [icon].
   The **Add Site** dialog displays:

3. In **URL** field, enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address.

NOTE: the format of the URL must match the SharePoint server URL.
If you require a fully qualified URL, you may need to define alternate access mappings for it.

4. In the **Authentication** section, enter your **User Name**, **Password**, and **Domain** for the site.
5. In the **Settings** section, configure the following options:
    a. Tap the **Sync Interval** field and choose one of the following options to determine the frequency of the sync interval:
        i.   Manually
        ii.   Every Open
        iii. 15 min
        iv.   30 min
        v.   Hourly
        vi.   Daily
    b. Tap the **Storage Limit** field and choose one of the following options:
        i.   No Sync, Browse Only
        ii.   10 MB
        iii. 20 MB
        iv.   50 MB
        v.   100 MB
        vi.   200 MB
        vii. 500 MB
        viii. 1 GB
        ix.   2 GB
        x.   8 GB
        xi.   16 GB
        xii. Unlimited

        NOTE: this setting is different from the **Global Sync Limit** that applies to the entire application (see **Managing Application Settings**). The **Global Sync Limit** setting overrides any individual site storage limits.

6. Tap **Done**.
    The site syncs and then displays the following dialog:
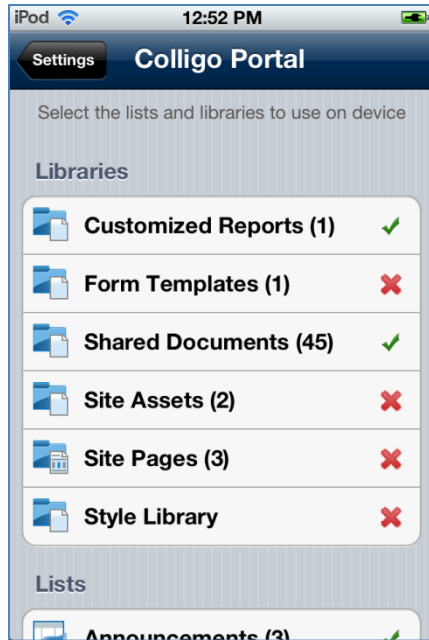
Tap to select or deselect a list or library that you want to sync. You can always revisit this dialog and set different sync options.

The following lists are disabled by default and need to be enabled manually:
- Site Pages
- Site Assets
- Style Library
- Form Templates

NOTE: if you add a site that has not been permitted by your IT administrator, the following error message displays:

If you need to have site added, contact your administrator.

Syncing a Site

Depending on your Sync Interval setting, you may need to sync the site to retrieve all the information for the lists and libraries. Until a site is synced, no information or data is available for display.

To sync a site, pull the screen down and release:

To see the progress of the sync, pull the Syncing arrow up to display the details:
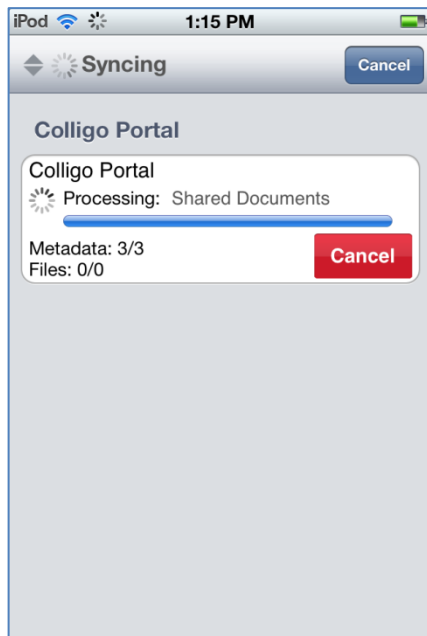
If this is the first time a site has been synced, all information is downloaded. Colligo Briefcase downloads all data until it reaches the limit you set in the **Storage Limit** option (see step 5 of **Adding a Site**). On the next sync interval, the least recently accessed files are deleted and newer data is downloaded.

The storage limit settings do not include metadata. All metadata for all items is downloaded on the initial sync, but this does not count toward the Storage Limit.

If you are viewing content offline, you cannot view documents that were not synced.

Editing a Site

To access and edit the information for a SharePoint site:
1. Tap the drop-down arrow to display your list of sites.
2. Tap the blue icon ⊙ beside the site you want to edit:
   The **Edit Site** dialog displays.
3. See steps 3 to 6 in **Adding a Site** for a description of the fields.

Deleting a Site

To delete a site:
1. Tap the drop-down arrow to display your list of sites.
2. Swipe the name of the site you want to delete from left to right.
   The **Delete** button displays:
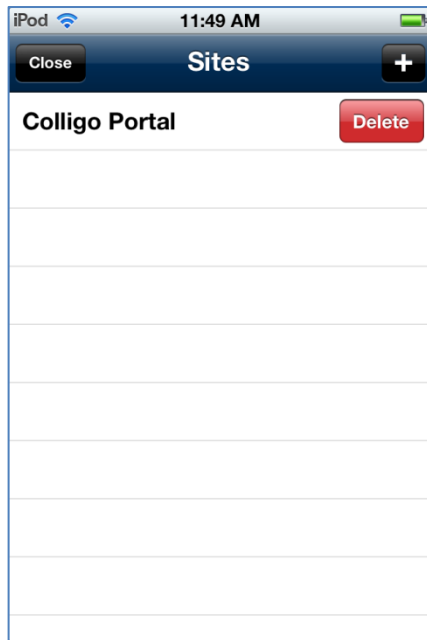
3. Tap the **Delete** button to remove the site from your list.
   NOTE: sites are deleted at the root level, so all sub-sites are also deleted.
4. Tap **OK** to continue with the removal, or **Cancel** to retain the site.

Viewing Items

1. After you add a SharePoint site, the sub-sites, libraries, and lists in that site display. The bracketed number beside each library or list indicates the number of items in that location.

2. To display a subsite, tap the name in the **SubSites** list.
3. The libraries and lists for that subsite display and you can choose which ones you want to be synced.
4. Tap on any library or list and the items contained in the library or list display in a new screen:
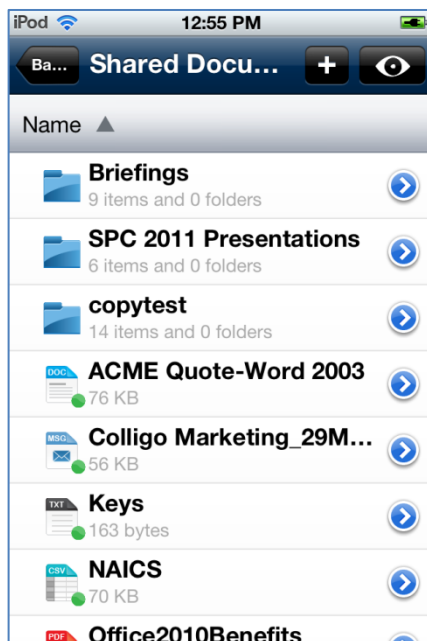
NOTE: If the item has a green circle icon, it means the item is synced and is viewable.

If the item has an orange circle icon, it means the item has not yet been synced and is not yet viewable.

If the item has a grey circle icon, it means the item is not going to be synced for one of the following reasons:
- Global storage limit is set to No Sync
- Site storage limit is set to No Sync
- List set to not store files offline
- File set to not be stored offline

5. If there are folders, you can tap the folder to display any subfolders or the items in the folder.
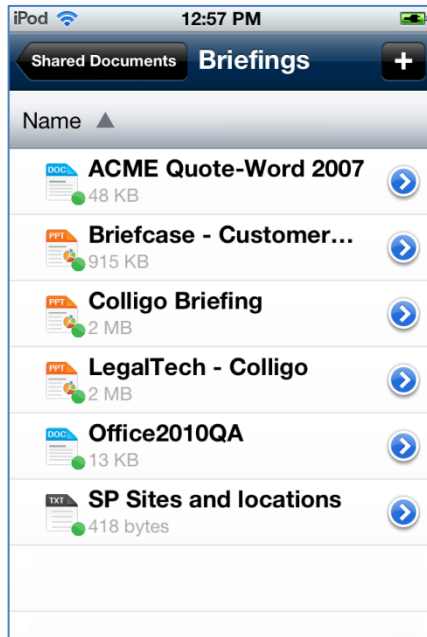
The subfolder name displays at the top of the screen. You can tap the button to return to the previous folder level.

Applying Views and Filters to Lists or Libraries

You can change the view of your content by applying a view that is configured in SharePoint, or you can filter the content by one or more metadata fields in your local view.

Applying Views

To filter your view of the items contained in a list or library:

1. Tap the ⬛ icon in the top right corner of the screen.
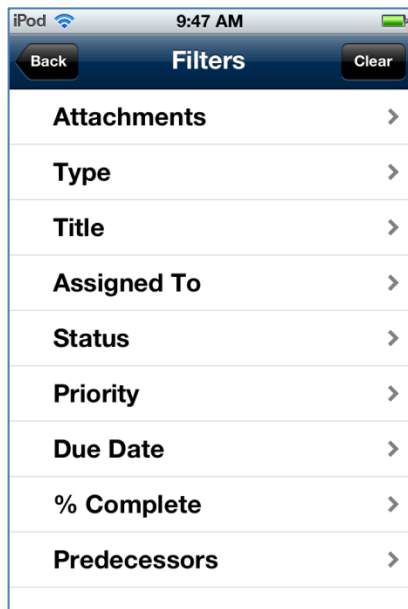   A list of available views displays on a new screen:
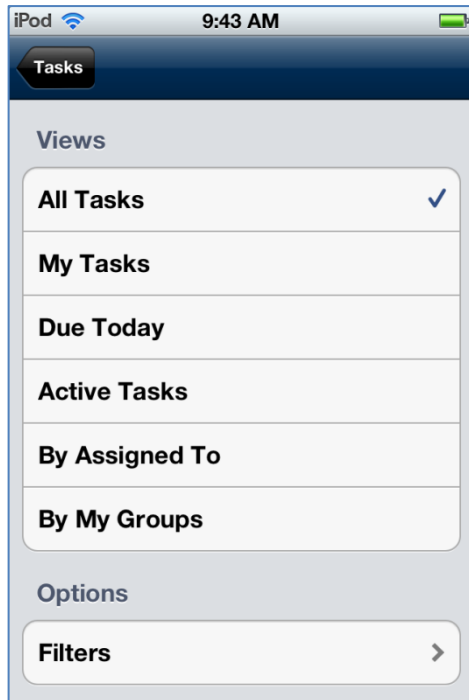
2. Choose your preferred option from the list of available choices.
    NOTE: the views available for the list or library are set in SharePoint.

Applying Filters

To apply a metadata filter to your content:

1. Tap the [icon] icon in the top right corner of the screen.
2. In the **Options** section, tap **Filters**.
   A list of metadata fields that are attached to the list or library displays on a new screen:

iPod 🔋	9:47 AM	🔋
Back	**Filters**	Clear
Attachments		>
Type		>
Title		>
Assigned To		>
Status		>
Priority		>
Due Date		>
% Complete		>
Predecessors		>

3. Select the metadata type to display the filter options:

iPod 🔋	9:47 AM	🔋	
Filters	**Values**	Clear	Done
(Empty)			
2 February, 2012			
10 June, 2012			
30 October, 2012			

4. Tap a value to select it and apply that filter to your content.
5. Tap a second value if you want to apply multiple metadata filters:

The check mark icon indicates which values are being used as filters.

To set new filters, tap the **Clear** button.

6. You can also add a second filter; the filter icon indicates which metadata fields are being used:
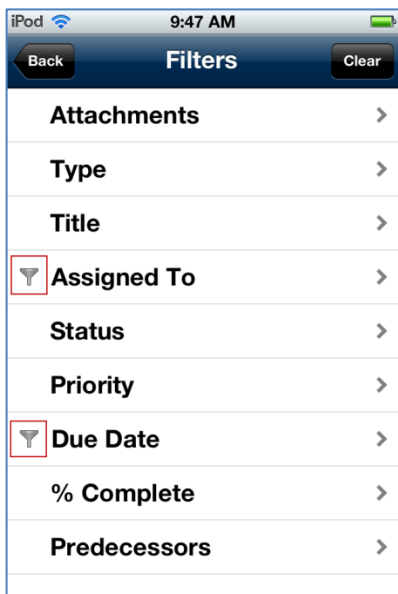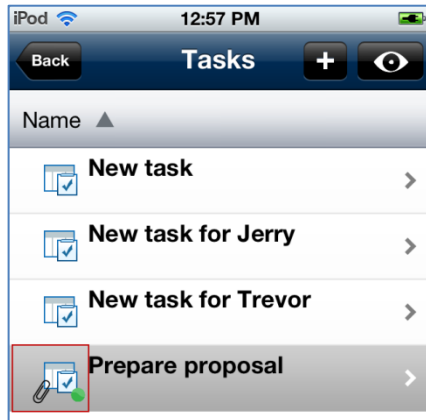

Tap the **Clear** button to clear any filters to the content.

NOTE: if you navigate away from the library or list that you have applied filters to, the filters no longer apply to your content.
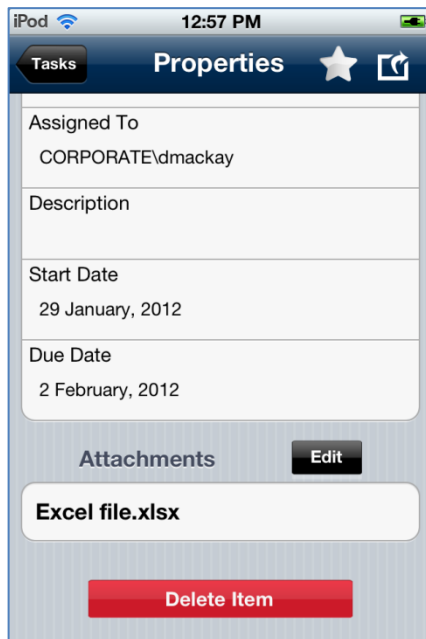
Viewing Attachments in Lists

If a list item contains an attachment, a paperclip icon displays in the list view:

The attachment is accessible from the metadata screen. Tap the icon at the end of the row to display the item's properties.

The **Properties** screen displays:

Any attachments display in list form in the **Attachments** section. To view the content of the attachment, tap the file name to display the document in a separate screen.

Deleting Attachments

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

 To delete an attachment in a List:
1. Tap the **Edit** button.
2. Tap the red circle to display the **Delete** button:
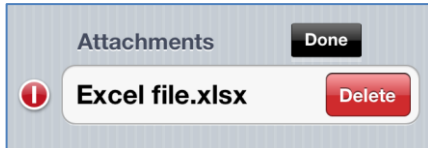
3. Tap **Delete** to delete the attachment or tap done to cancel the deletion.

NOTE: you can only delete attachments from List items. Attachments that are filed to Libraries as part of an email (.msg file) cannot be deleted.

Viewing an Item

To view the contents of an item, tap the file name in the list. The document displays on a new screen:

Viewing, Editing, and Creating InfoPath Forms

Colligo Briefcase supports the creating, viewing, and editing of InfoPath forms in both libraries and lists.

NOTE: InfoPath Forms are not available for viewing or editing when offline.

In this release of Colligo Briefcase for Good, you can view InfoPath forms, but cannot edit or create them. Contact Colligo for more information.

Viewing or Editing InfoPath Items

To view and edit the contents of an InfoPath form:
1. Select the item to display the form on a new screen:

2. Edit as needed and tap **Save**.

InfoPath Forms in lists display as all other list item types, showing the item details in list form:

You can edit the fields by tapping the **Edit** button. For more information about editing InfoPath form properties, see **Viewing and Editing Item Properties**.

Creating New InfoPath Form Items

If you try to add a new form to a library when you are offline, an error message displays. However, if you try to add a new form to a list when you are offline, you are able to fill out the item metadata, which will be uploaded when you are online again.

To create a new InfoPath form item:

1. Tap the ⊞ icon in the InfoPath form list or library.
   For Lists, select **List Item** from the available actions.
   The InfoPath form displays on a new page:

2. Edit as needed and tap **Save**.

Viewing and Editing Item Properties

To view and edit the details of an item in a List or Library, tap the blue icon ⊙ beside the item file name. The item's details display in a separate screen:
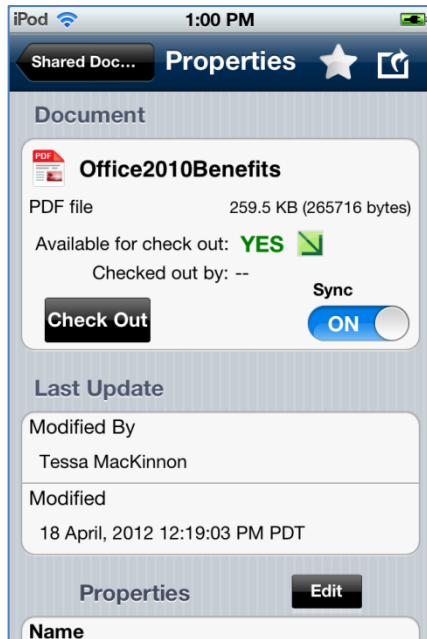
Tap the star icon ⭐ to add the item to your Favorites list.

Tap the action icon ⬆ to display contextual options for the item. The options are dependent on the file type and the configuration of your iPod/iPhone.

Viewing Item Details

In the **Document** section, you can see the file type, name, and size. In the **Last Update** section, you can view the name of the person who last edited the item, and the date it was last modified.

Syncing an Item

In the **Document** section, you can enable syncing for the item and any attachments by choosing **ON** or **OFF**. If you choose **OFF**, the item is no longer viewable offline.

Checking an Item Out/In

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

 To check an item out, tap the **Check Out** button in the **Document** section. The Check Out icon is overlaid on the item in the SharePoint site so other users know you are editing it. If you have checked an item out, the option to **Check In** displays. However, you can't check a document in if you didn't check it out.

NOTE: you cannot check out items in Lists. The Check Out option displays only for items in Libraries.

Deleting an Item

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

To delete an item, tap the **Delete Item** button. A confirmation dialog displays, asking for confirmation of the deletion. If you choose **Yes**, the item is tagged with a **Deleted** icon:

These items are deleted on your next sync.

If you return to the item's **Properties** screen before you have synced the change, you can cancel the deletion by tapping the **Cancel Delete Item** button.

Editing Item Properties

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

In the **Properties** section, you can view the item properties. These properties are defined in SharePoint.

To edit, tap the **Edit** button. The fields become editable:

Edit the fields as needed and tap **Done**. The changes are uploaded to SharePoint during your next sync.

All SharePoint property types are supported in Briefcase and different interfaces display depending on the type of property. The following are some of the editing methods available depending on the type of property:
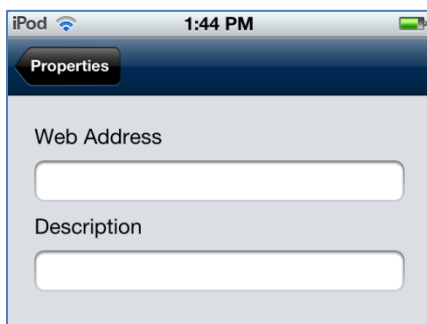
- If the field is text based, the keyboard displays
- If the field is Yes/No, tap once to toggle between them
- For date fields, tap once to display the following and scroll to the preferred date:
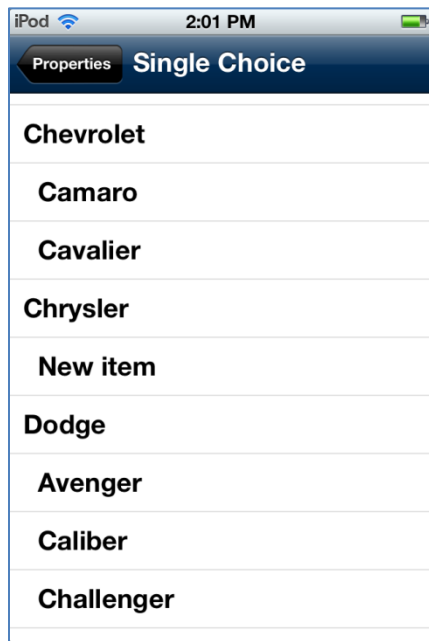

- For Date and Time fields, tap once to display the following and scroll to the preferred date and time:

- For Hyperlink fields, tap once to display the following fields:
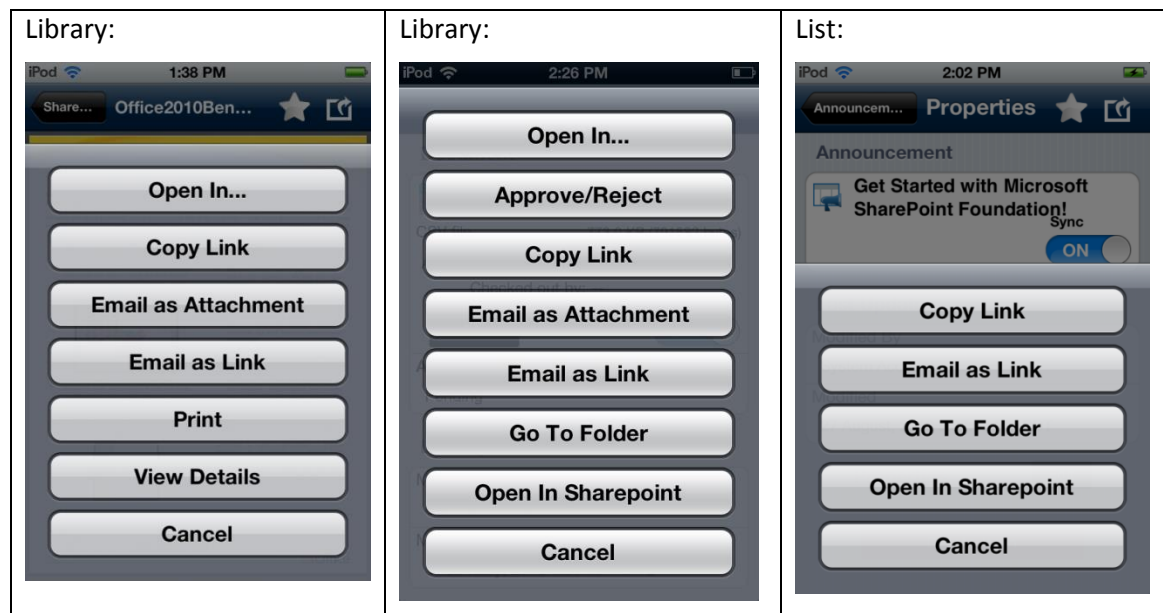
- For Managed Metadata, tap once to display the following list:

Sharing Items

After you have selected an item and the item content is displayed you can tap the action icon [icon] to display the contextual actions available for items of that type. Not all actions are available for all items. Libraries and Lists have different options:

Library:	Library:	List:

If you are using Colligo Briefcase Enterprise, some of the action items may be disabled by Colligo Administrator. These include the Open In... option, the Email as Attachment option, and Print option. This is a security feature available to prevent external sharing of documents.

Opening and Editing an Item

Choose the **Open In...** option to display a list of programs that support that file type. You must have programs compatible with the document type for this option to display. Examples of applications you may want to use include Documents to Go, for viewing and editing Microsoft Office documents, and GoodReader for Adobe Acrobat documents.

NOTE: In Briefcase with Good Dynamics, you are only permitted to open documents in other Good Dynamics enabled applications.

After you have opened and edited a document, you can upload it back to SharePoint using Briefcase. Please see **Uploading Items to SharePoint** for more information.

In this release, the edit item feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

Some of the apps that you choose to open an item in may not function because they are not on the list of approved apps set in Colligo Administrator. Contact your system administrator to have an app added to the list.
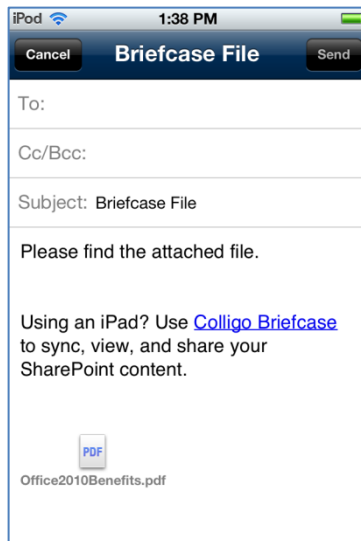
Copying a Link to the Item

Choose the **Copy Link** option to copy the link to the item's location in SharePoint. You can then paste this link into a document or email as needed.

Emailing the Item as an Attachment

*This feature is only available if you have a Good-enabled email client.*

Choose the **Email as Attachment** option to launch a new email with the item embedded as an attachment. You must have an email program present on your iPod/iPhone for this option to display:

Emailing the Item as a Link

This feature is only available if you have a Good-enabled email client.

Choose the **Email as Link** option to launch a new email with a link to the item in SharePoint. You must have an email program present on your iPod/iPhone for this option to display.
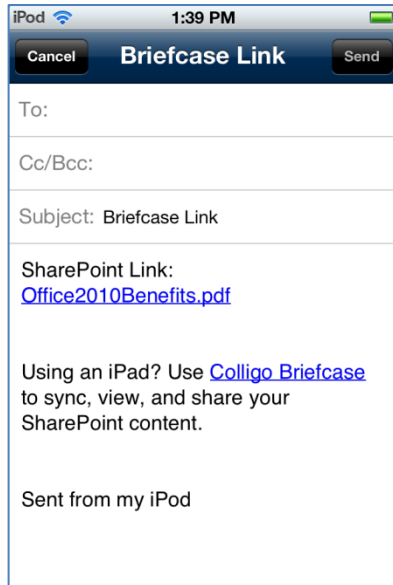
Printing the Item

Choose the **Print** option to print the item. This option displays only for PDF and image files, and you must have Air Print enabled on your iPod/iPhone.

Viewing Details

Choose the **View Details** option to view the item properties. See **Viewing and Editing Item Properties** for more information.

Go to Folder

For List items, choose the **Go To Folder** option to return to the item's List location.

Open In SharePoint

For List items, choose the **Open in SharePoint** option to launch the online view of the list.

Approving or Rejecting an Item

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

 If the SharePoint library your item is in has an approve/reject field, you can select **Approve/Reject** from the action item menu.

NOTE: this option is only available for items that are in a **Pending** state.

The **Approve/Reject** dialog displays:

Enter any comments you might have and tap the appropriate label in the **Approval Status** bar:

- o **Approved**
- o **Rejected**
- o **Pending**

Creating New List Items

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

To create a new list item:

1. Select the list you want to add a new item to and tap the ⊞ button.
2. Select **List Item** from the menu:

3. A screen launches, displaying the fields related to the list item type you are creating. Fill in the required fields for the task and tap **Done**.
   The task is added to the list and to the SharePoint site during your next sync.

Viewing Calendars

Briefcase supports special views for Calendars, presenting a graphical view of a calendar:

To change the view, tap the folder icon on the top right and choose your preferred option:
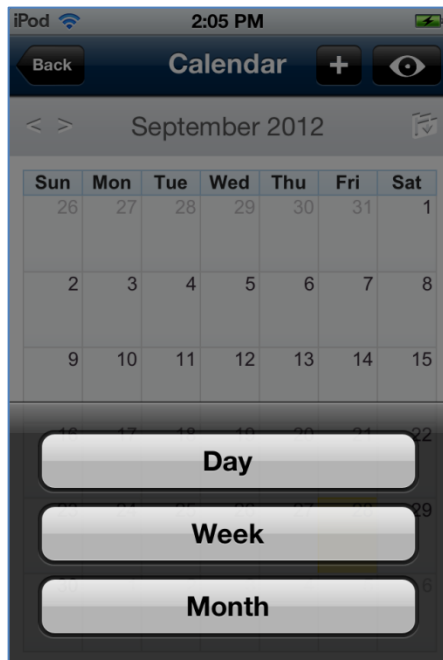
You can also tap a specific day in the **Week** or **Month** view, to display the **Day** view.
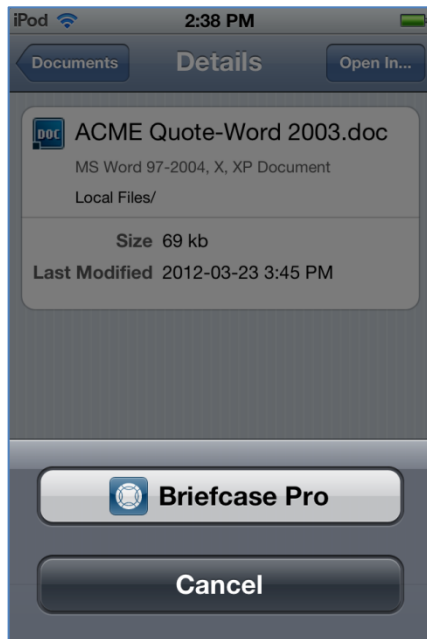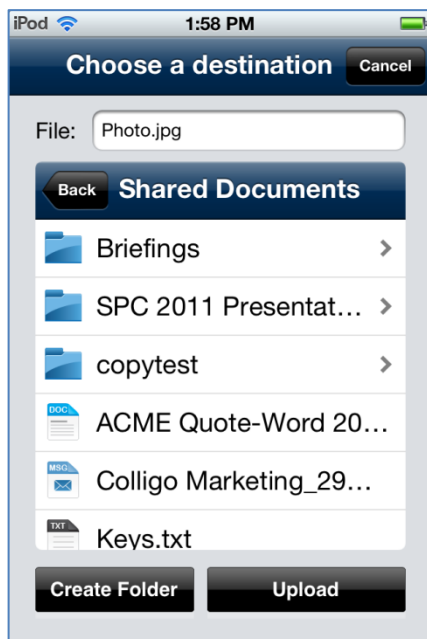
Uploading Items to SharePoint

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

To upload an item to SharePoint through Briefcase:

1. Choose Briefcase from the native application's **Open In** menu:

2. Briefcase launches, with the **Choose a destination** dialog displayed:

3. Navigate to the Site, List, or Library you want to file the item to.

4. If you want to create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.

5. Tap **Upload**.
   The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to:

6. Tap the **Content Type** field and choose the preferred option (if displayed):

The fields that display may change according to the Content Type chosen.

7. Enter any information about the item in the appropriate fields.

8. Tap **Done**.
   The item is uploaded to the SharePoint location.
   If you are offline, the file is uploaded on the next synchronization.
   NOTE: if your SharePoint site has versioning enabled, you can save the document as a major or minor version to the library.

Uploading a Photo from the Camera

To upload a photo from the iPod/iPhone camera:

1. Tap the [+] icon and choose either **Photo From Camera** or **Photo From Library** from the menu.
   NOTE: the menu differs depending on whether you are in a list or library:

   Action menu for Libraries: Action menu for Lists:
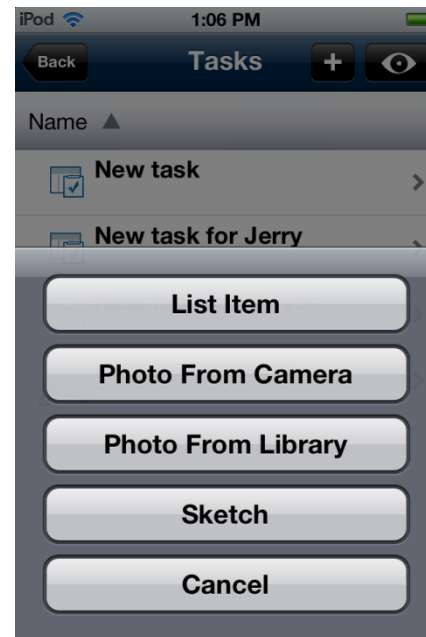
2. If you choose **Photo From Camera**, the iPod/iPhone camera launches.
3. Take the photo and tap the **Use** button in the bottom right corner.
   The **Choose a destination** dialog displays:

4. Navigate to the site list or library where you want to save the photo.

NOTE: If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.

5. Tap **Upload** or **Attach**.
   The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
6. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
7. Enter any information about the item in the appropriate fields.
8. Tap **Done**.
9. The photo is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.

Uploading a Photo from the Library

To upload a photo from the iPod/iPhone library:

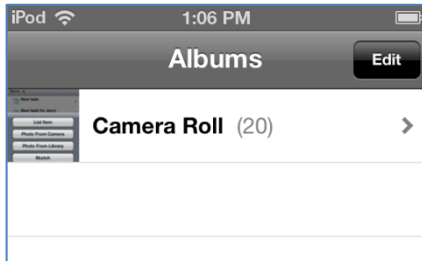1. Tap the ➕ icon and choose **Photo From Library** from the menu.
   The **Photos** menu displays:

2. Navigate to the preferred image and select it.
   The **Choose a destination** dialog displays:
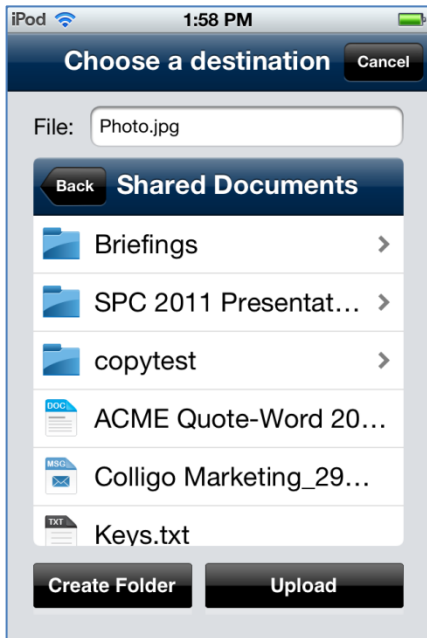
3. Navigate to the site list or library where you want to save the photo.
   NOTE: If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.
4. Tap **Upload** or **Attach**.
   The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
5. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
6. Enter any information about the item in the appropriate fields.
7. Tap **Done**.
8. The photo is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.
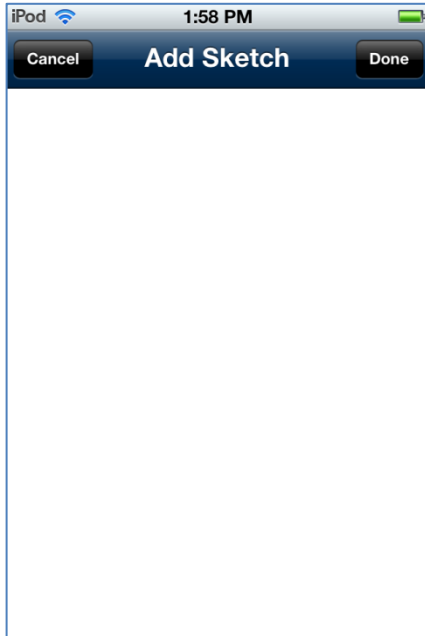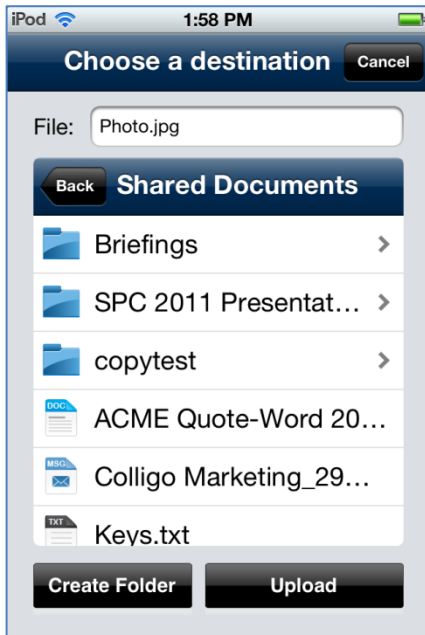
Uploading a Sketch

To create and upload a sketch to a SharePoint location:

1. Tap the ⊞ icon and choose **Sketch** from the menu.
    The **Add Sketch** dialog displays:

2. Complete your sketch.
3. Tap **Done**.
    The **Choose a destination** screen displays:

4. Navigate to the Site, List, or Library you want to file the item to.

5. If you want to create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.
6. Tap **Upload**.
7. The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
8. Enter any information about the item in the appropriate fields.
9. Tap **Done**.
   The item is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization.

NOTE: if your SharePoint site has versioning enabled, you can save the document as a major or minor version to the library.

Managing Playlists

You can add your frequently viewed items and folders to a Playlist for quick and easy access. You can create subject-specific Playlists to group relevant items and folders together. Playlists are not site specific; the items and folders can be from any of the sites you have downloaded.
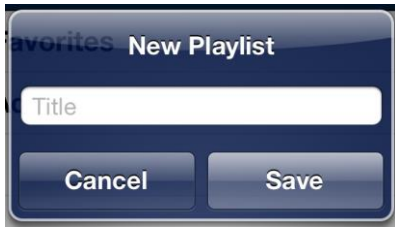
Adding an Item to a Playlist

To add items you view frequently to a Playlist:
1. Tap the item you want to add to a list.
   A preview of the item displays.
2. Tap the Playlist icon ⭐ in the top right corner of the screen.
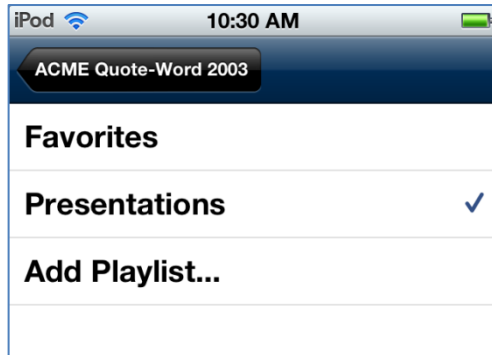   The Playlist screen displays:
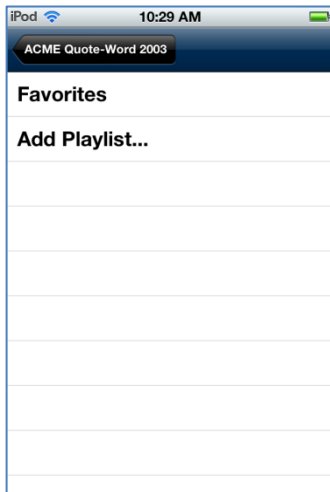
3. From the menu, choose to add the item to an existing Playlist or choose **Add Playlist** to create a new one.
4. If you choose **Add Playlist**, the following dialog displays:

5. Enter the name of the new Playlist.
6. Tap **Save**.
   The new Playlist now displays as an option to add the item to:

7. All lists display under the **Playlists** section on the home screen:

   NOTE: For information about adding a folder to a Playlist, see Error! Reference source not found..
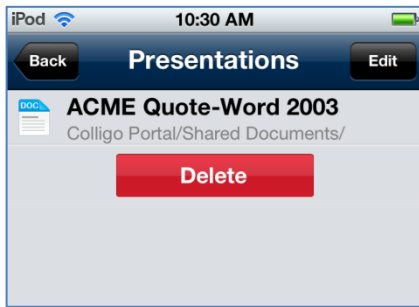
Viewing Playlist Items

To view items in a Playlist, tap one of the lists in the **Playlists** section on the home screen:
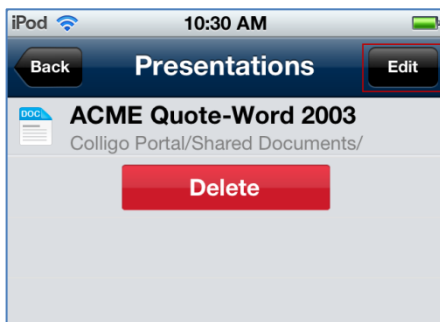
A list of your items displays:
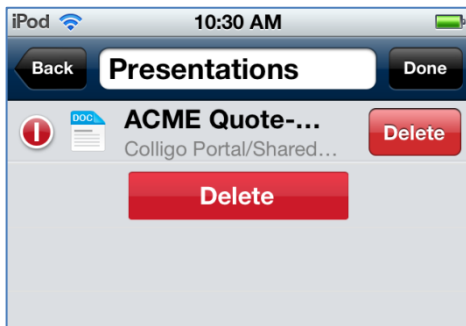

Editing and Deleting Playlist Items

To edit or delete items in a Playlist:

1. Tap the **Edit** button.

The list displays with a red icon beside each item.

2. Tap the red icon beside the item you want to delete.
   The **Delete** button displays beside the item name:

3. Tap the **Delete** button to remove the item from your Playlist.

   NOTE: You can also remove an item or folder from a Playlist by tapping the Playlist icon in the item or folder display and tapping the name of the Playlist currently selected. You can also use this icon to associate the item with a different Playlist.

4. To reorder items in a Playlist, tap and drag on the lines to the right of the item name and move the item up or down as preferred.

Deleting a Playlist

To delete a Playlist:

1. Tap the **Delete** button at the bottom of the list:
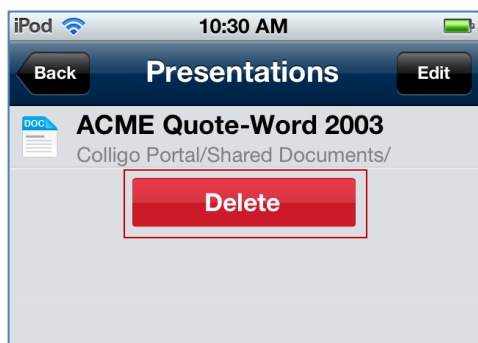
A confirmation dialog displays:

2. Tap **Delete**.

Resolving Synchronization Conflicts

In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.
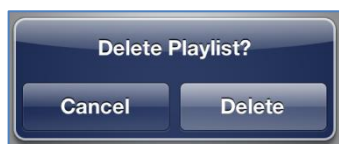
There are three potential scenarios for a conflict to occur in Briefcase:

1. **Metadata conflict**: This conflict occurs when there is a difference between an item's metadata on the SharePoint site and the version stored on Briefcase.
2. **Deletion Conflict**: This conflict occurs in two different scenarios:
   a. When a Briefcase user deletes an item and another user makes changes to the item on SharePoint.
   b. When a Briefcase user edits an item and another user deletes the item from SharePoint. ***NOTE:*** In this scenario, the Briefcase file must be synced for the conflict resolution process to occur.
3. **File Conflict**: This conflict occurs when two users make changes to the same file at the same time.

Conflicts are detected during synchronization and if any are found, the conflict icon ⚠ displays. Tap it to display the list of sync issues and tap the item you want to resolve:
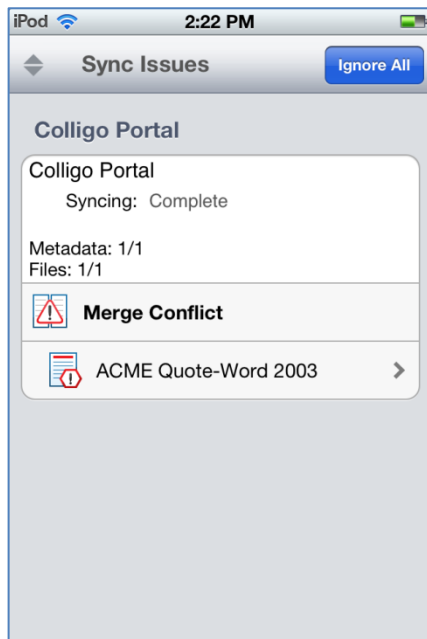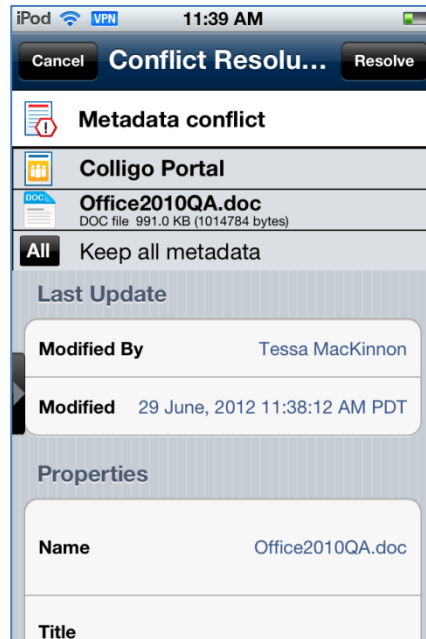
Metadata Conflict

The **Conflict Resolution** screen displays all conflicted fields marked in red.

To resolve the conflict:
1. The screen shows the metadata fields for the item on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left to see the metadata fields for the same item on the SharePoint site (right side):

2. Scroll down to see the metadata field(s) in conflict and tap the field that you want to keep. The checkmark icon indicates which property will be saved:


3. If there are multiple fields in conflict, use the **All** button to select all metadata fields for one version.
4. When you have made your selection, tap the **Resolve** button in the top right of the screen.

Deletion Conflict

To resolve a deletion conflict:

1. The screen shows the item details on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left to see the details for the same item on the SharePoint site (right side):
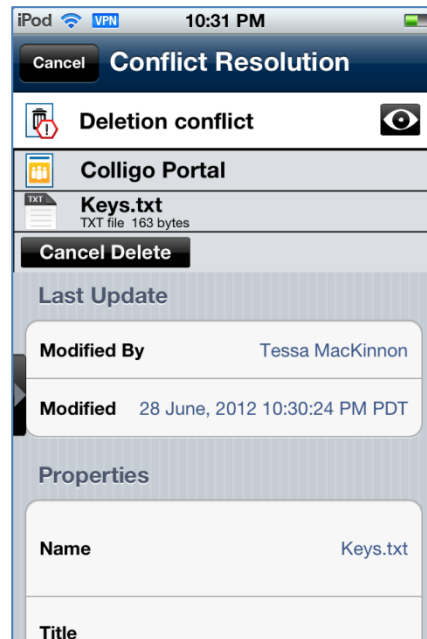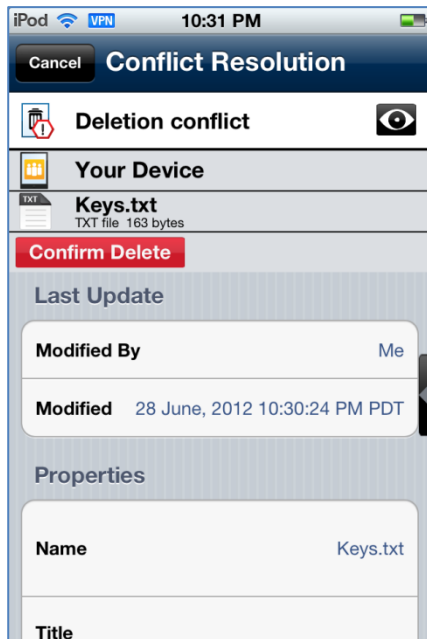
2. Use the Preview button to view the changes that have been made since your last sync.
3. When you have decided if you want to go ahead with the deletion or not, tap either the **Confirm Delete** button or the **Cancel Delete** button.

File Conflict

To resolve a File conflict:

1. The screen shows the item details on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left scroll to see the details for the same item on the SharePoint site (right side):
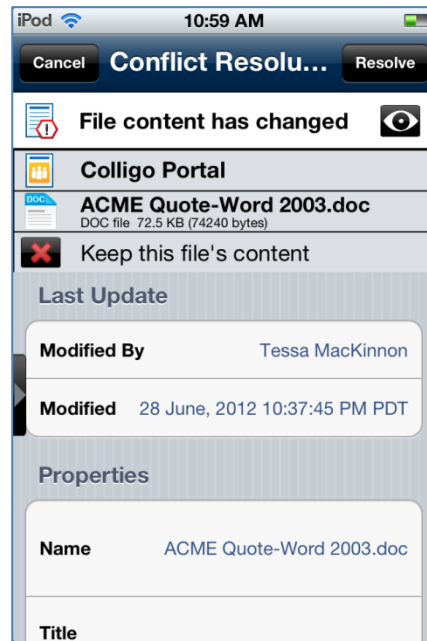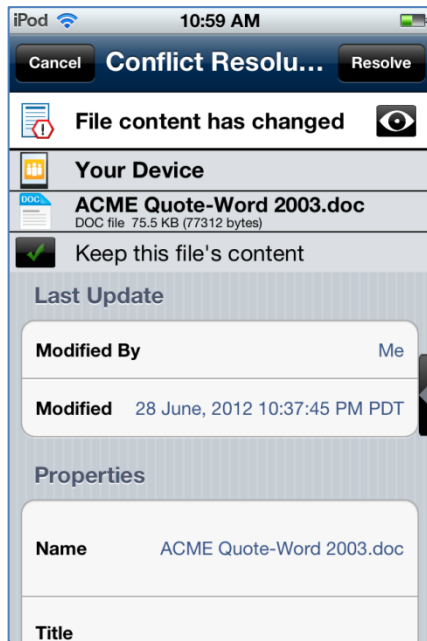
2. Use the Preview button to view the differences between the file on Briefcase and the file on the server.
3. Tap the button beside **Keep this file's content** to choose which version you want to keep. The checkmark icon indicates which file will be saved.
4. Tap **Resolve**.

Searching SharePoint Lists and Libraries

To filter a site's list and libraries, enter one or more characters in the search field. This filters the available content and displays a list of items that contain the characters you have entered:
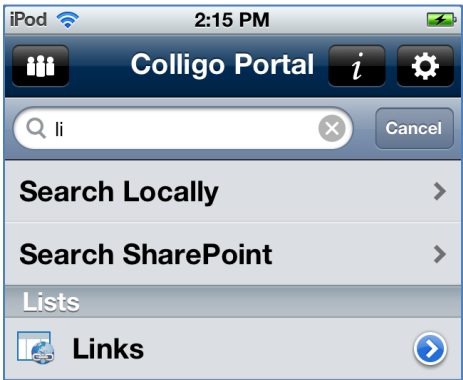
To search, enter your search term and choose one of the two options:

Search Locally: this option means you are searching only the content within the local cache. The results are sorted by List and Library name. Tap a file to display the content.	**Search SharePoint:** this option means you are searching the online SharePoint site. The results display the path of the file location. Tap a file to download and display the content. *NOTE:* this option is only available online

Managing Settings

In Colligo Briefcase you can specify settings both at the folder level and at the application level. Site settings are specified when you connect the site initially. For information on editing site settings, see **Editing a Site**.
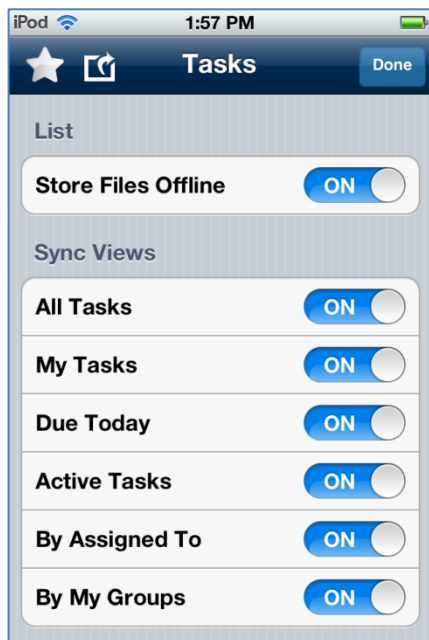
Managing Folder Settings

You can manage the settings for each folder, provide links to the folder locations, and add folders to your Favorites list.

To manage folder settings:

1. Tap the blue icon beside the folder you want to set tasks for.
   The folder settings dialog displays:

2. In the **List** section, choose if you want to store the files for that folder offline by choosing **ON** or **OFF**.
3. In the **Sync Views** section, select which views you want to synchronize, by choosing **ON** or **OFF**.
4. Click the ⭐ icon to add the folder location to your Favorites list.
5. Click the action icon 📤 for access to the **Copy Link** and **Email Link** options.
   - **Copy Link**: tap this button to copy the link to the folder location in SharePoint to paste into a document or email
   - **Email Link**: tap this button to launch a new email with a link to the folder location in SharePoint

Managing Application Settings

1. Tap the ⚙ icon at the top of the screen to display the **Colligo Briefcase Settings** dialog:

2. In the **Sync Control** section, configure the following settings as preferred:
   a) **Global storage limit**: This setting specifies how much local storage on the iPod/iPhone should be used for syncing SharePoint content offline. You can also select a No Sync mode where no content is stored offline, documents and other items are only downloaded when they are previewed. Choose one of the following options:
   i.   No Sync, Browse Only
      ii.   10 MB
      iii.   20 MB
      iv.   50 MB
      v.   100 MB
      vi.   200 MB
      vii.   500 MB
      viii. 1 GB
      ix.   2 GB
      x.   8 GB
      xi.   16 GB
      xii.   Unlimited
   b) **Alert on Favorite updated**: This setting lets you choose if you want to receive an alert when an item that you have marked as a favorite is updated. Tap to choose **ON** or **OFF**.
   c) **Sync on 3G/4G**: This setting is not supported for Briefcase installations on the iPod/iPhone.
   d) **Prompt for Metadata:** this settings lets you control the Properties screen that displays when you add a new item to a List or Library. Tap to choose **ON** or **OFF**.
      NOTE: if the prompt is turned off but there is a required field in the Library or List, the file remains checked out to the user who has uploaded the file and cannot be checked in until these fields are completed.

3. In the **Passcode** section, tap the **Passcode Enabled** field.
   The **Enter Passcode** screen displays:
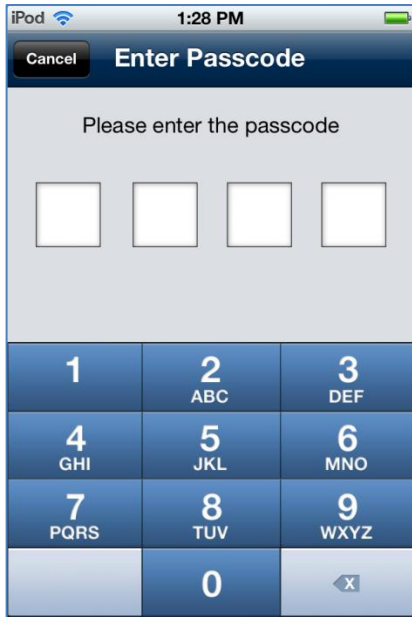
In this release, this feature is not supported by Colligo Briefcase for Good. Contact Colligo for more information.

    a.   Enter your passcode.

    b. Enter the passcode a second time to confirm it.

         Once you have set a passcode, the following options display:
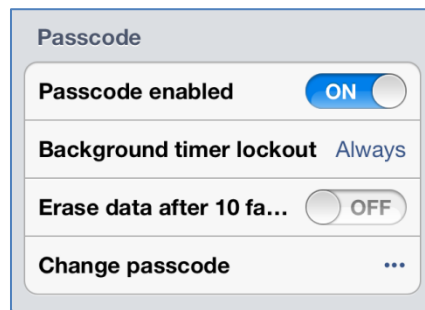
     i.   **Passcode enabled**: if you want to disable the passcode you need to enter the existing passcode to do so, unless you have enabled it within the previous minute

     ii. **Background timer lockout**: tap to choose the length of time that will trigger a lockout

   iii. **Erase data after 10 failed logins**: tap to choose **ON** or **OFF**

   iv. **Change passcode**: tap this button to display the **Change Passcode** dialog; enter the existing passcode, then enter the new passcode twice to confirm

About Colligo Briefcase

Click the information icon at the top of the screen to display the **About Colligo Briefcase** screen:

Tap the **Colligo Website** button to launch www.Colligo.com.

Tap the **Feedback** button to launch an email. The **To:** field is populated with the BriefcaseFeedback@colligo.com email address, and the **Subject** line is populated with Colligo Briefcase Feedback. The body of the email contains the version number of Colligo Briefcase.

This feature is only available if you have a Good-enabled email client.

Tap the **User Guide** button to launch the Colligo Briefcase for Good User Guide.

Tap the **Privacy Policy** button to view Colligo's privacy policy.

Appendix I: Supported File Types

Supported File Types	Common Icon Name
folder	folder
txt	Text File
text	Text File
rtf	Rich Text File
pdf	Adobe File
doc	Word file
docx	Word file
xls	Excel file
xlsx	Excel file
ppt	Power Point File
pptx	Power Point File
jpg	JPG File
jpeg	JPG File
gif	GIF File
png	PNG File
tiff	TIFF File
bmp	BMP File
numbers	Numbers File
key	Keynote File
pages	Pages File
msg	Email File
eml	Email File
csv	Excel File

Unsupported File Types	Common Icon Name
Zip	Zip File
html	html File
htm	html File
css	css File
one	OneNote File
All others	Unknown File