

# Colligo Briefcase 1.1

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Enterprise, Pro, and Lite Editions

User Guide



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## SECURE ACCESS TO SHAREPOINT ON THE IPAD – ONLINE OR OFFLINE

Welcome to Colligo Briefcase, the iPad solution for SharePoint. Colligo Briefcase lets you easily view, sync, find, and share files, lists, images, documents and emails, including Outlook .msg files, from SharePoint. SharePoint content is automatically synchronized to the iPad, providing instant access, even when offline. Colligo Briefcase is as easy to use as consumer file-sharing applications, encouraging use of SharePoint while ensuring security of enterprise content.

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.

### Key Features

- **View:** See SharePoint content right inside the Colligo Briefcase application
- **Sync:** Automatically synchronize to SharePoint for offline access to the latest content
- **Find:** Search for content to find the right file quickly
- **Share:** Send links or attachments for easy collaboration

### 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
- Reduces the need for laptops for document viewing and presentations
- Drives user adoption of SharePoint by improving ease of use

### Platforms Supported

- iPad or iPad 2 with WiFi (3G optional), iOS version 4.2 or later
- SharePoint 2010, SharePoint 2010 Online (Office 365) and SharePoint 2007

## COLLIGO BRIEFCASE LITE

Colligo Briefcase Lite is downloadable from the Apple app store and is free for personal use. The following features are not enabled in the lite version:

- Adding more than one site; for more information, see Adding a Site.
- Setting a global sync limit to over 50 MB; for more information, see Adding a Site.
- Specifying which site lists and libraries to sync; for more information, see Adding a Site.
- Setting a Passcode Lock; for more information, see Managing Settings.

## COLLIGO BRIEFCASE PRO

Colligo Briefcase Pro is available from the Apple store and has no site or sync limits. It does not support Colligo Administrator.

## COLLIGO BRIEFCASE ENTERPRISE

Colligo Briefcase Enterprise is available from Colligo under license. Contact Colligo for more information on how to obtain an enterprise license for your company or organization.

To learn more about Colligo Briefcase Enterprise, visit <http://www.colligo.com/briefcase-trial>.

Colligo Briefcase Enterprise provides:



- Unlimited sync storage capacity
- Unlimited number of sites and lists to sync
- Additional security
  - Provides an application-specific lock-code for extra level of security; data is wiped after 10 consecutive failed attempts
  - Ability to remotely wipe application data from any device [via MDM systems]
  - Utilizes hardware-based encryption (AES-256) for all local data
  - SharePoint credentials stored in the KeyChain, providing the highest form of trust-chain security
- Supports Colligo Administrator for centralized management of sites and settings
- Turnkey enterprise deployment services, software maintenance and support

## COLLIGO ADMINISTRATOR

Colligo Briefcase Enterprise 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
- Push out SharePoint sites and document libraries with zero user interaction
- Monitor SharePoint and Colligo Briefcase usage via reports and metrics
- Reduce deployment time and streamline the provisioning of iPads in the enterprise

## INSTALLING COLLIGO BRIEFCASE LITE OR PRO

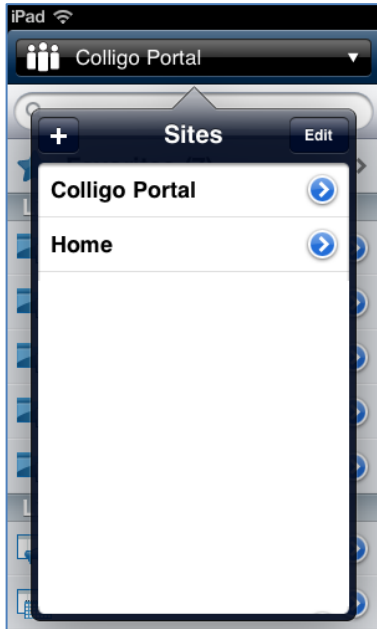
To install Colligo Briefcase Lite or Colligo Briefcase Pro, connect to the App Store and download the latest version to your iPad. After Colligo Briefcase is installed, tap the **Colligo Briefcase Lite** icon  or the **Colligo Briefcase Pro** icon  to open the application. You can now add a SharePoint site.


## MANAGING SHAREPOINT SITES

Colligo Briefcase lets you connect to SharePoint sites. You can add, edit, and remove sites, as well as add folders to your Favorites.

### Adding a Site

1. Tap the drop-down arrow to display your list of sites:



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

 A screenshot of the 'Add Site' dialog box. The title bar includes 'Cancel' and 'Done' buttons. The dialog is organized into sections:
 

- Site Information:** A text field for 'URL' with the example 'http://server/workspace'.
- Authentication:** Three text fields for 'User Name' (Required), 'Password' (Required), and 'Domain' (Optional).
- Settings:** Three rows of settings: 'Sync Interval' set to 'Manually', 'Storage Limit' set to 'Unlimited', and 'Lists to Sync' with a three-dot menu icon.

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*In Colligo Briefcase Lite, you can only add one site. Colligo Briefcase Pro and Enterprise allow you to add an unlimited number of sites.*

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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. Unlimited

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

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*In Colligo Briefcase Lite, you cannot set the Storage Limit to more than 50 MB. Colligo Briefcase Pro and Enterprise allow unlimited storage.*

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- c. Tap the **Lists to Sync** field to display a list of lists and libraries in the site:



*In Colligo Briefcase Lite, you cannot choose which lists and libraries you want to sync. Colligo Briefcase Pro and Enterprise allow you to specify which lists and libraries are synced.*

You can tap to select or deselect a list or library that you want to sync, and then choose **Sync Later** or **Sync Now**. If you choose the **Sync Later** option, you can revisit this dialog and set different sync options.

The following lists are disabled by default and need to be enabled manually:

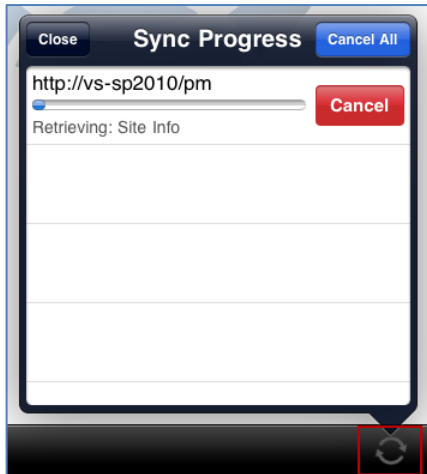
- Site Pages
- Site Assets
- Style Library
- Form Templates

6. Tap **Done**.

## 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, tap the icon in the bottom left corner:




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 6 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 limit you set in the Storage Limit option.

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

## Editing a Site

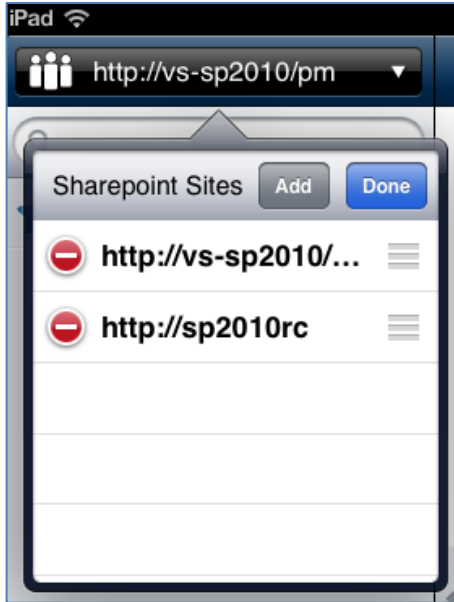
To access and edit the information for a SharePoint site:

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.

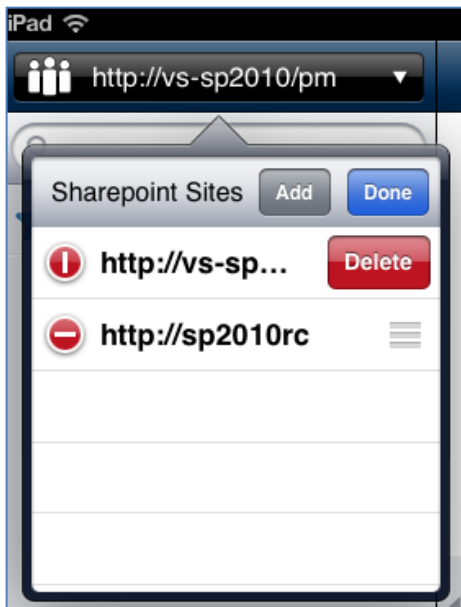
## Deleting a Site

To delete a site:

1. Tap the drop-down arrow to display your list of sites.
2. Tap **Edit**.  
The Sites display with a red icon beside each top-level site.



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



4. 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.
5. Tap **OK** to continue with the removal, or **Cancel** to retain the site.

### Reordering Sites

To reorder your list of sites:

1. Tap the drop-down arrow to display your list of sites.
2. Tap **Edit**.
3. Tap and drag on the lines to the right of the site name and move the site up or down as preferred.  
You can reorder top-level sites or sub-sites within a site.

## Displaying a Site

To display a SharePoint site you have added, tap the drop-down arrow in the SharePoint Sites list and tap the site you want to view. The libraries and lists associated with the site display in the left column.

## NAVIGATING LISTS AND LIBRARIES

1. After you add a SharePoint site, the libraries and lists in that site display in the left column of the screen. The bracketed number beside each library or list indicates the number of items in that location.
2. Tap on any library or list and the items contained in the library or list display in the right column.

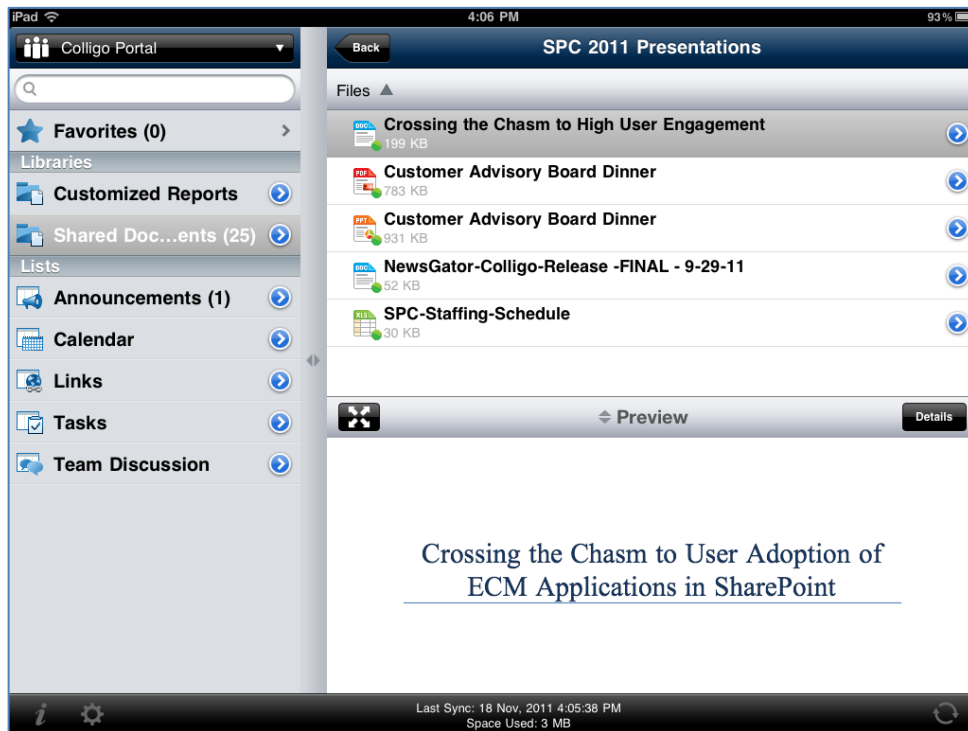
**NOTE:** If the item has a green circle icon, it means the item is synced and is viewable.

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

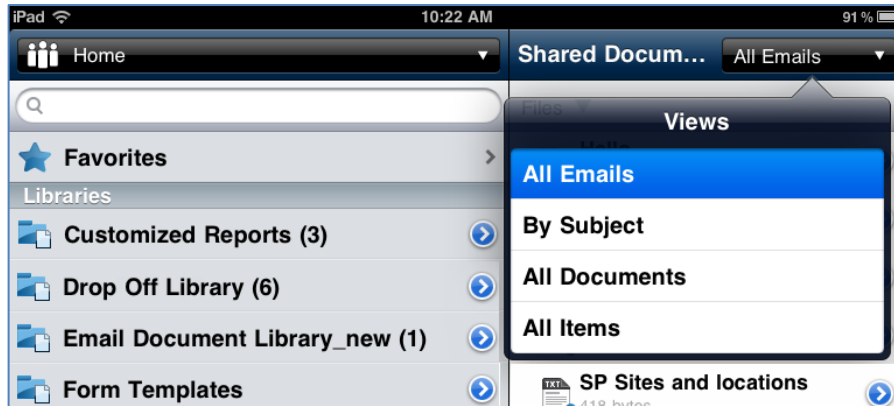
3. If there are folders, you can tap the folder to display any subfolders or the items in the folder.



The subfolder name displays at the top of the screen [**SPC 2011 Presentation**]. You can tap the back button to return to the previous folder level.

## Viewing Lists or Libraries

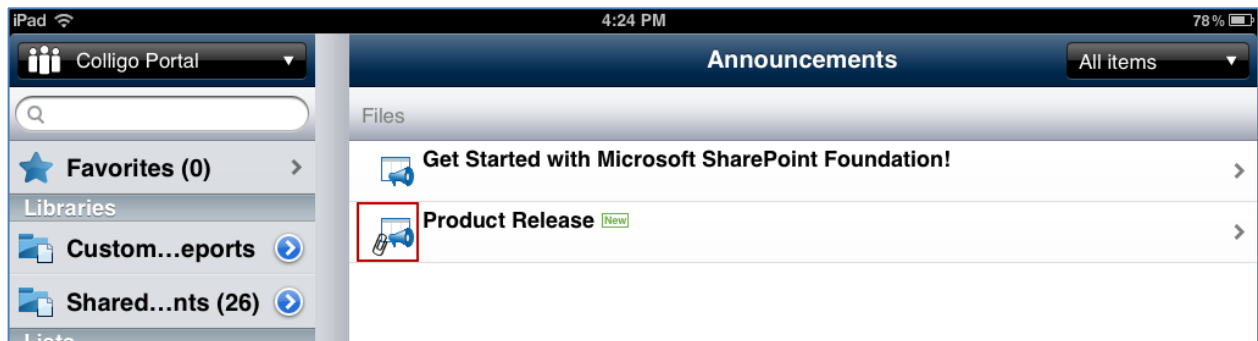
To view the items contained in a list or library, tap the **All Documents** or **All Emails** button in the top right corner of the screen. A drop-down list of available views displays. Choose your preferred options from the list of available choices:



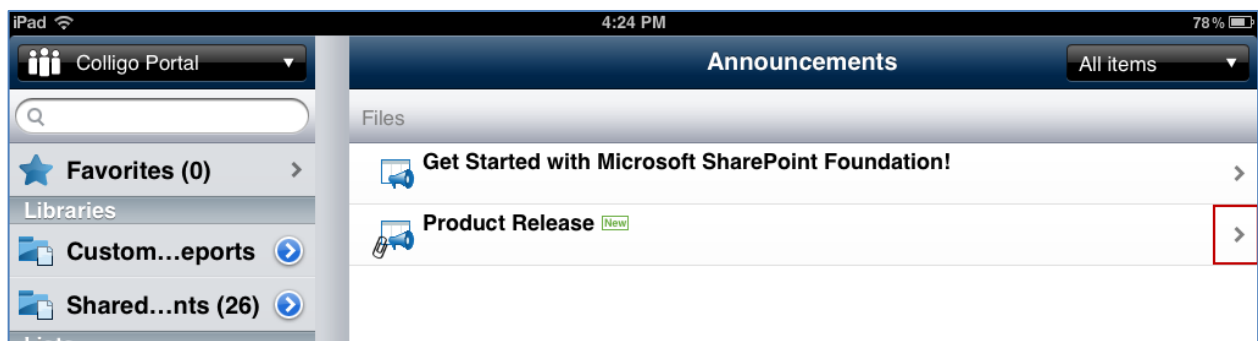
**NOTE:** the view options displayed for the list or library are set in SharePoint.

## Viewing Attachments in Lists

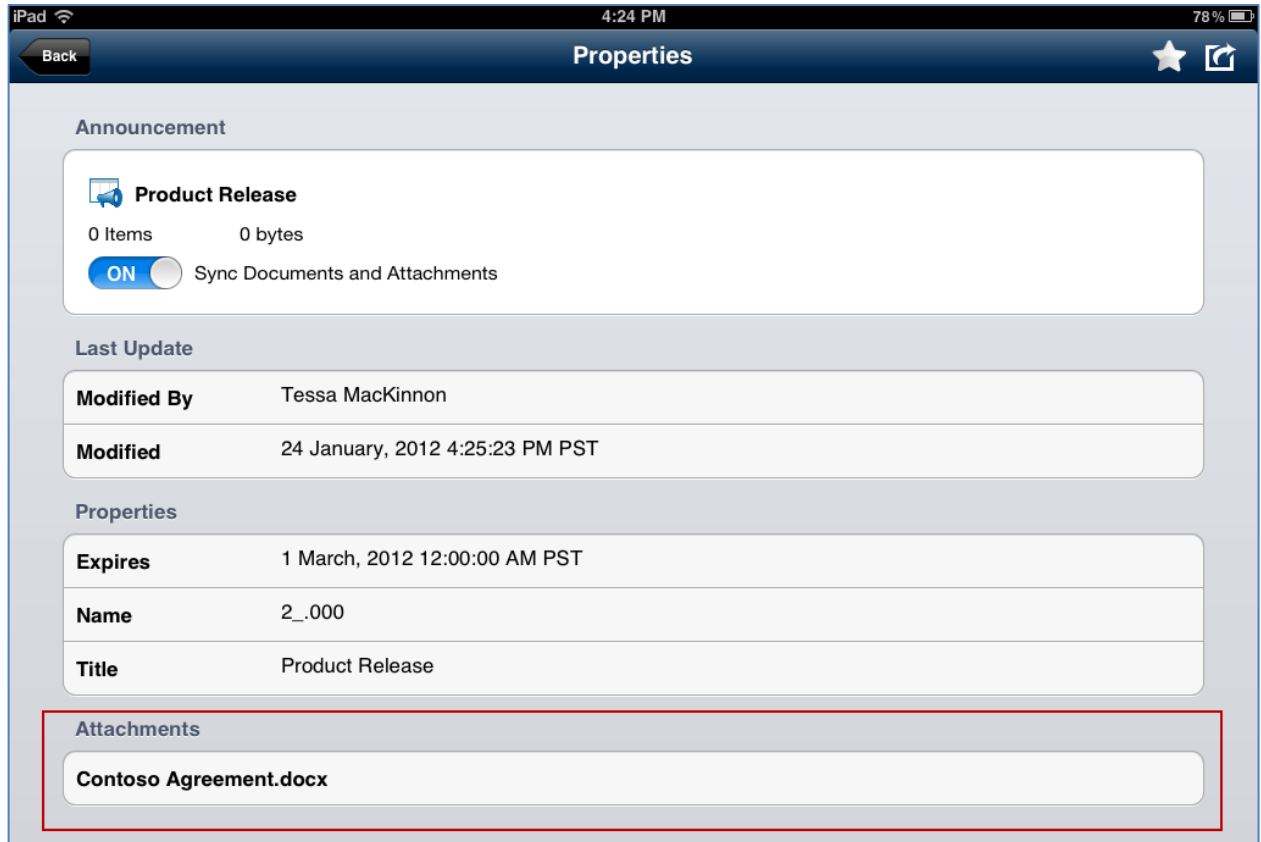
If a list item contains an attachment, a paperclip icon displays in the list view:



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



The **Properties** screen displays:

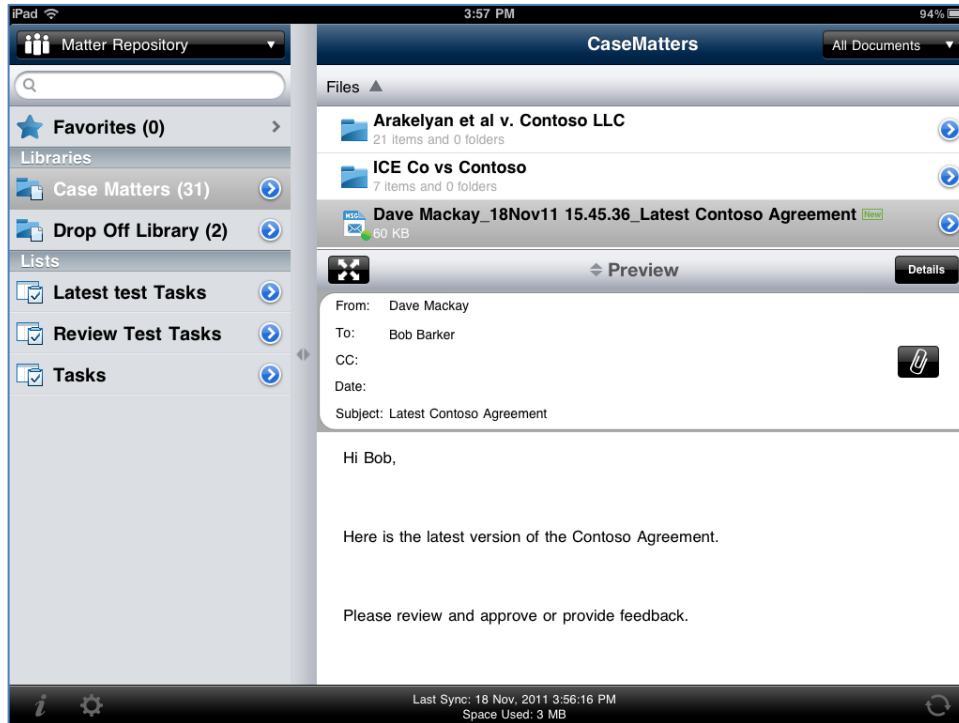


Any attachments display in list form in the **Attachments** section. To view the content of the attachment, tap the field to display the document in a separate screen.

## Previewing an Item


To preview an item in a document library, tap and drag the **Preview** tab at the bottom of the screen. The **Preview** pane displays any item you tap in the list above it.

**NOTE:** If the Preview pane is open, the selected item automatically displays in it. If the preview pane is closed, the selected item displays on a separate screen.



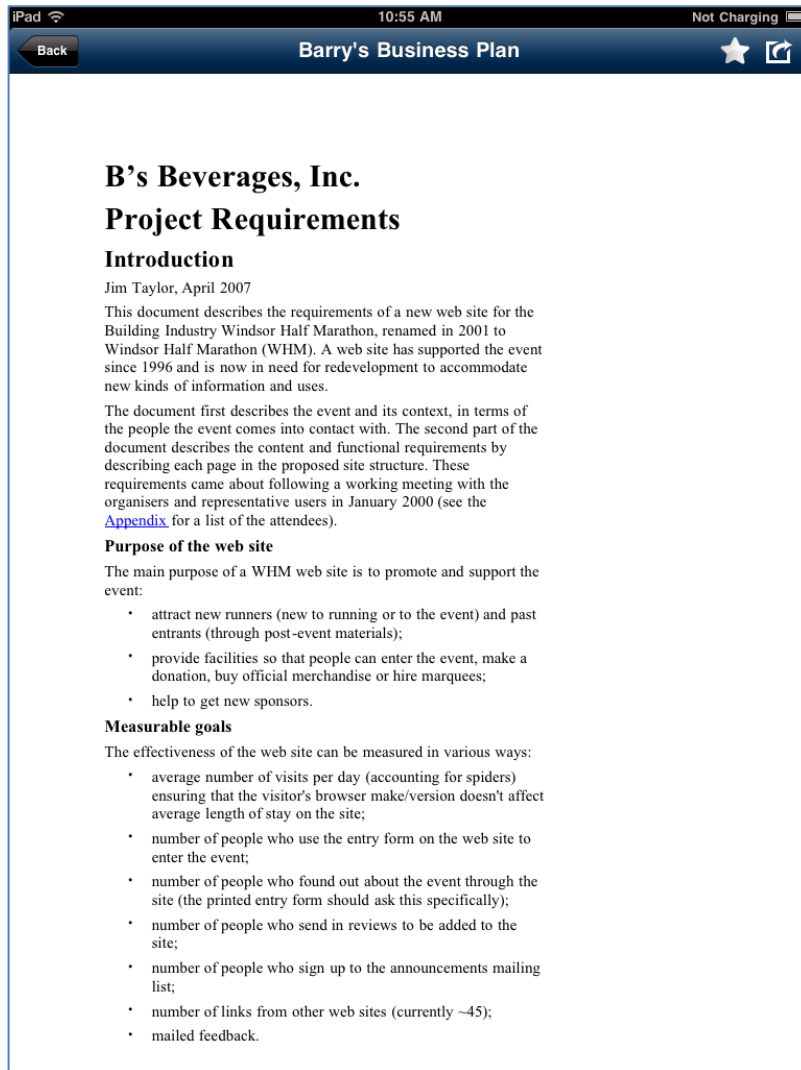
To resize the preview pane, drag the tab up or down.

Tap the **Details** button to view the details of the item.


Tap the  icon to display the item on a separate full screen.

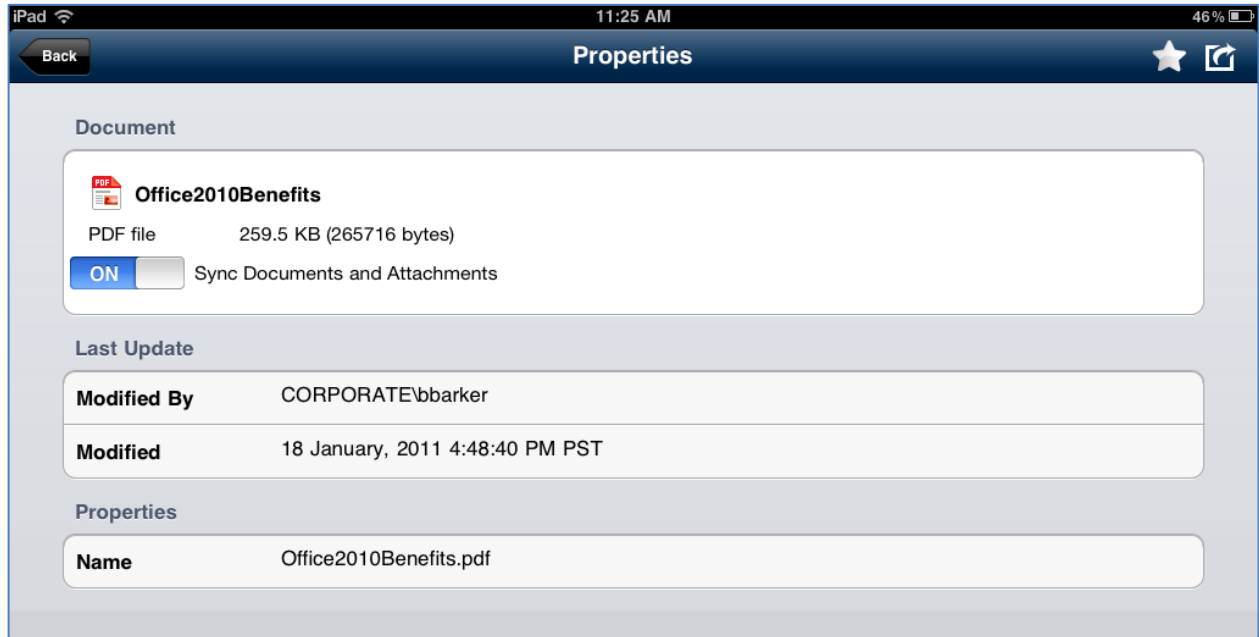
## Viewing an Item

To view the contents of an item, tap the file name in the list. If the **Preview** pane is open, the content displays there. If not, the contents display on a separate screen:



## Viewing Item Details


To view the details of an item in a document library, tap the blue icon  beside the item file name. The item's details display in a separate screen:




In the **Document** section, you can see the file type, name, and size. You can also enable syncing for the item.

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.

In the **Properties** section, you can view the metadata for the item. The metadata fields are defined for the list or library in SharePoint.

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 iPad. For more information, see **Managing Items**.


## Viewing Item Metadata

Colligo Briefcase offers a grid view of all items in a list or library so you can see all metadata for all items at the same time. To display this view, drag the pane all the way to the left, or tap the pane quickly; the view changes to a grid, displaying all metadata fields for the items within the list or library:

Type	Name	Content Type	Title	Created	
msg	DevProConnections_...	Email	WPF and Silverlight:...	2011-03-04 18:56:30	▶
msg	WinInfo Daily UPDA...	Email	WinInfo Short Takes,...	2011-09-09 21:03:40	▶
msg	WinInfo Daily UPDA...	Email	WinInfo Short Takes,...	2011-06-10 19:51:00	▶
msg	Windows IT Pro_23F...	Email	Windows IT Pro - It's...	2011-03-04 18:52:40	▶
pdf	Whitepaper_Content...	Document	Whitepaper_Content...	2011-03-04 19:03:30	▶
msg	howtogeek-daily@aw...	Email	What You Said: Do...	2011-07-25 16:40:50	▶
msg	howtogeek-daily@aw...	Email	Week in Geek: TDL-...	2011-07-04 21:56:00	▶
msg	Martin Muldoon_10F...	Email	Webinar: Developing...	2011-03-04 18:54:50	▶
msg	Iron Mountain_04Feb...	Email	Webinar: Archiving &...	2011-03-04 18:55:30	▶
msg	Bamboo Solutions_1...	Email	Webinar - SharePoin...	2011-03-04 18:54:40	▶
msg	Quest Software_23F...	Email	Webcast Series - Sh...	2011-03-04 18:52:30	▶
msg	CorasWorks_17Feb1...	Email	Webcast Access: To...	2011-03-04 18:53:40	▶


▶ Preview

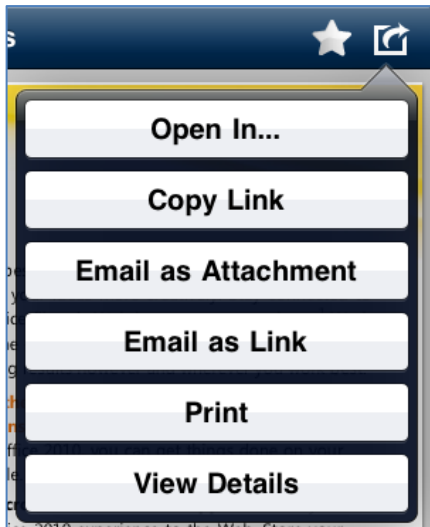
Scroll back and forth to view all metadata columns. The metadata columns are defined in the SharePoint list or library.

Tap the  icon to view the details for that item.

Tap the item name to display the contents on a separate screen.

## Managing Items

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



*If you are using Colligo Briefcase Enterprise, some of the action items may be disabled using 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 an Item

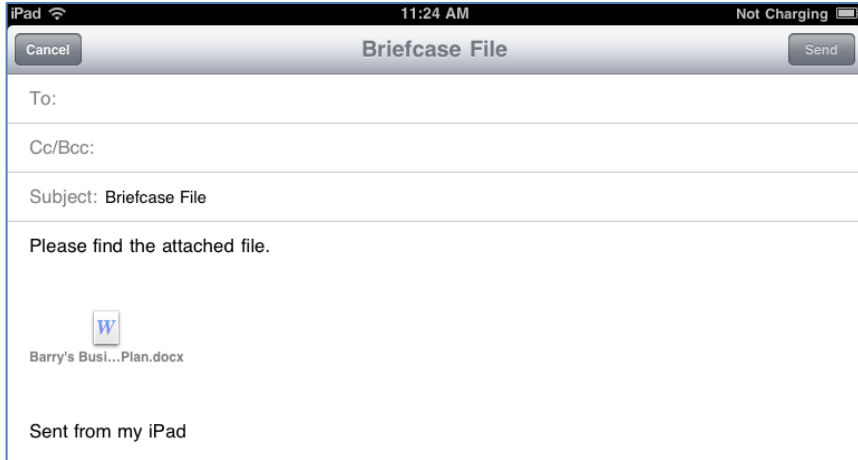
Choose the **Open In...** option to display a list of possible programs to open the item in. You must have programs compatible with the document type for this option to display. Examples of applications you may want to use include Documents to Go, for viewing and editing Microsoft Office documents, and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

### 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.

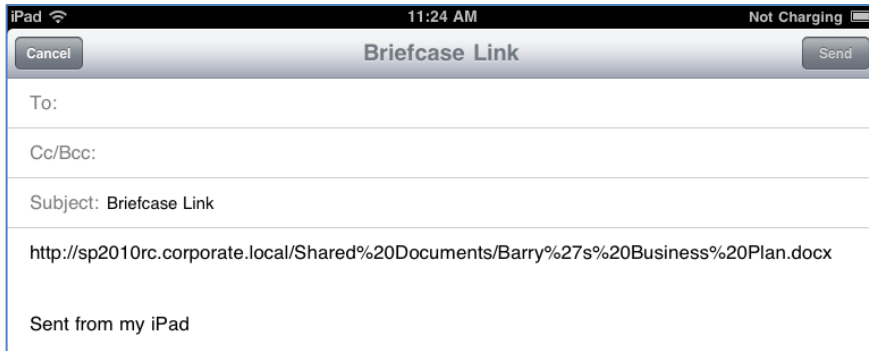
### Emailing the Item as an Attachment

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 iPad for this option to display:



### Emailing the Item as a Link

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 iPad 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 iPad.

### Viewing Item Details

Choose the **View Details** option to view the details of the item.

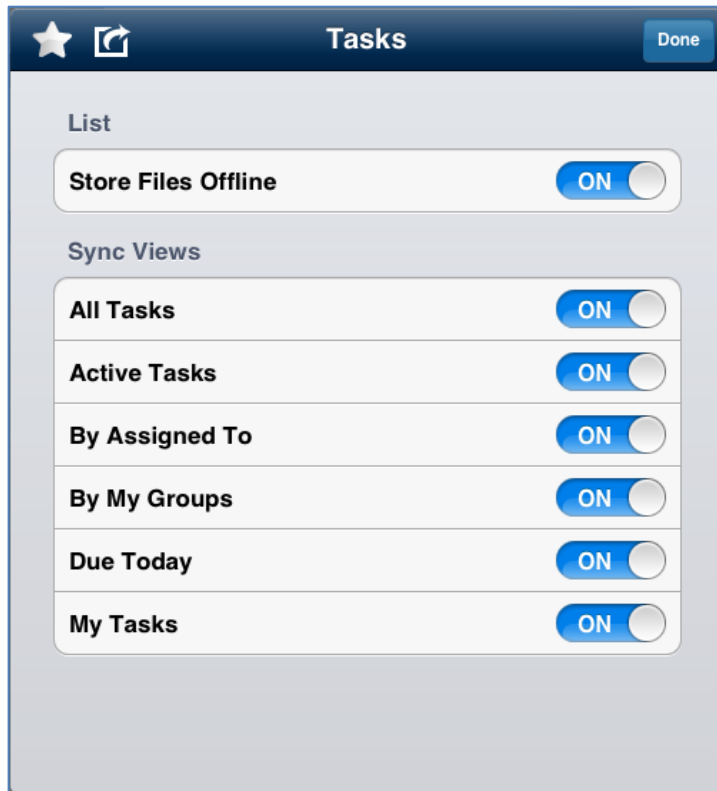
## Managing Folder Settings



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 FAVORITES

You can add your frequently viewed items to your Favorites list for quick and easy access. The Favorites list is not site specific; the items and folders can be from any of the sites you have downloaded.

### Adding an Item to the Favorites List

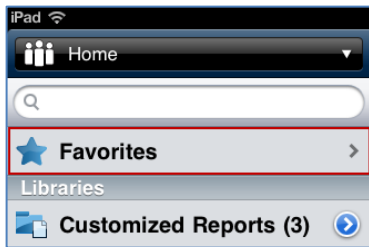
To add items you view frequently to your Favorites list:

1. Tap a library or list containing the item you want to make a Favorite.  
The items contained in the library or list display in the right side of the screen.
2. Tap the item you want to make a Favorite.  
A preview of the item displays.
3. Tap the Favorite icon  in the top right corner of the screen to add the item to your Favorites list.
4. Any favorites display under the Favorites list on the main screen.

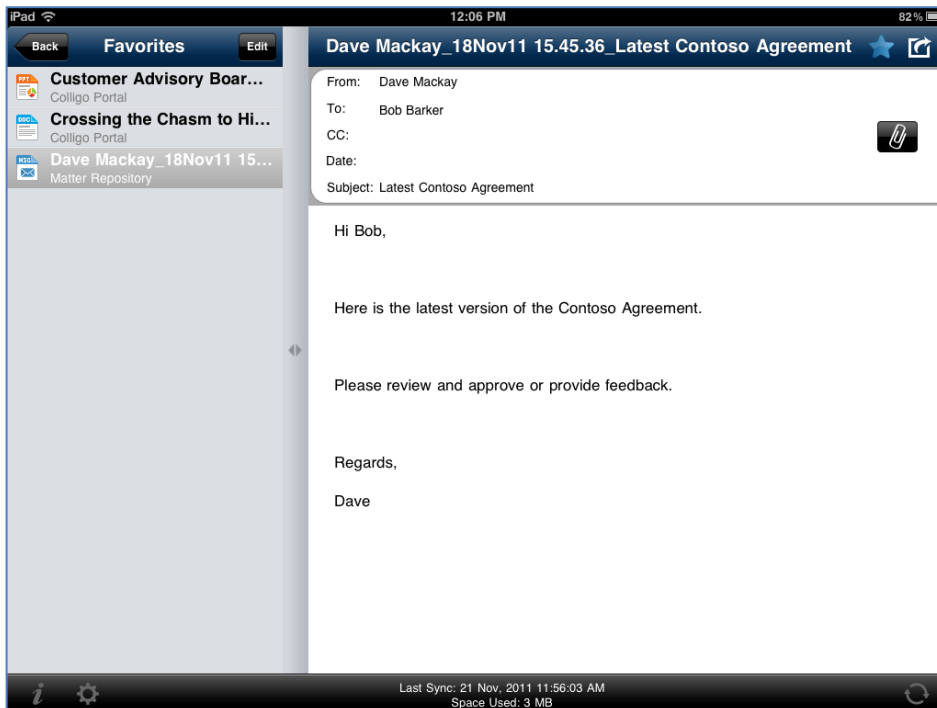
**NOTE:** For information about adding a folder your Favorites list, see **Managing Folder Settings**.

### Viewing the Favorites List

To view items in your Favorites list, tap the **Favorites** button on the home screen:

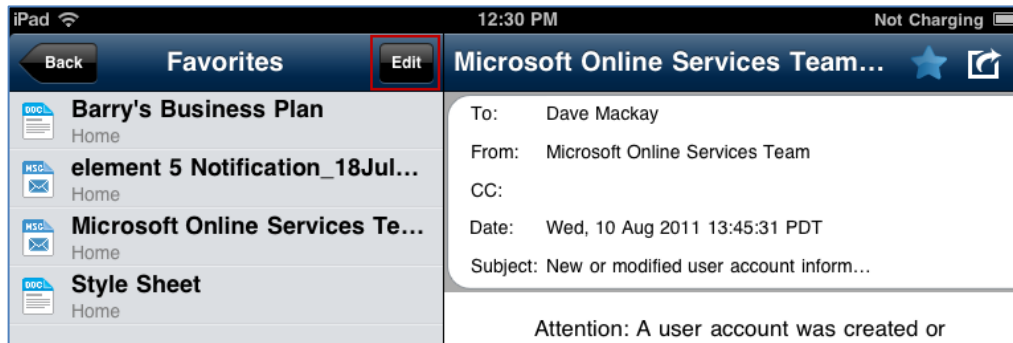


A list of your favorite items display, with the selected item content displayed in the preview pane beside it:



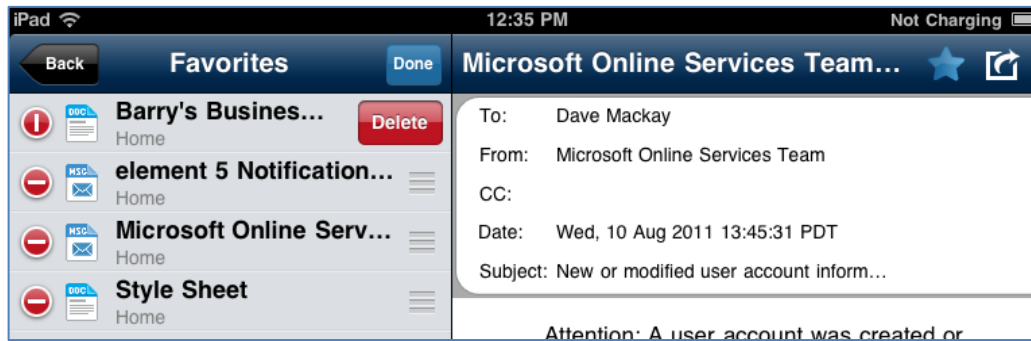
## Editing Favorites

1. To delete or re-order your Favorites, 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:



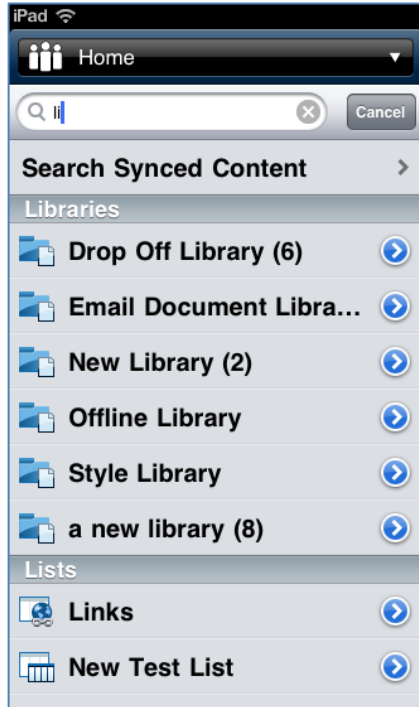
3. Tap the **Delete** button to remove the item from your Favorites list.

**NOTE:** You can also remove an item or folder from the Favorites list by tapping the favorite icon  in the item or folder display.

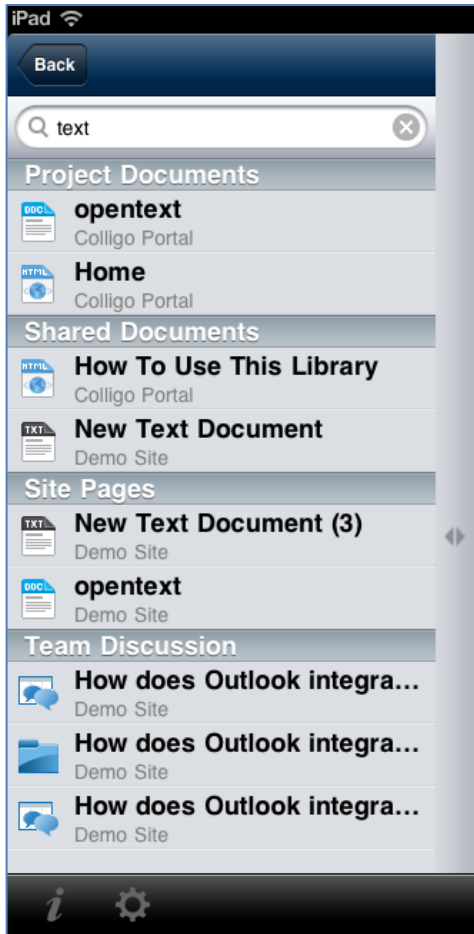
4. To reorder your Favorites list, tap and drag on the lines to the right of the item name and move the item up or down as preferred.

## 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 within the site and displays a list of items that contain the characters you have entered:

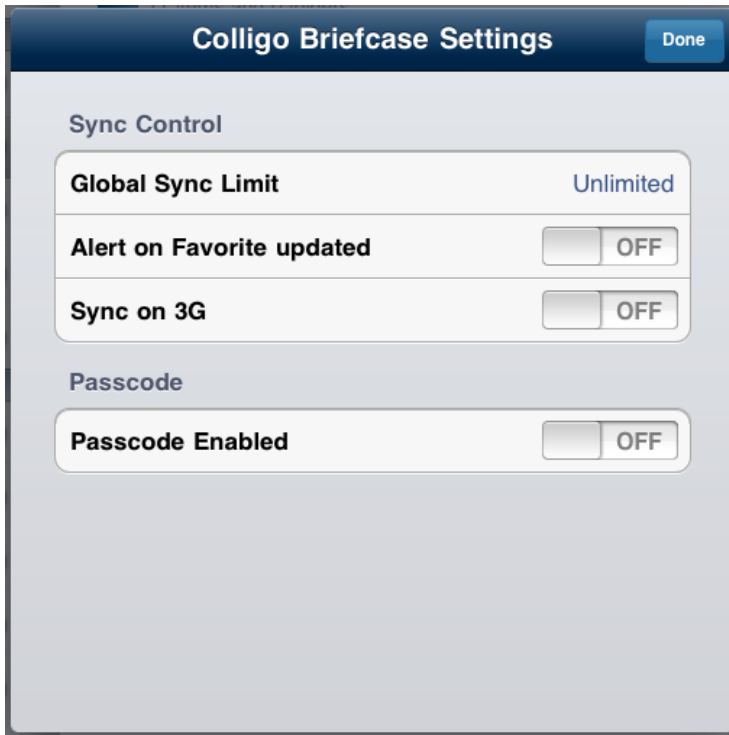


To search the synced content, enter your search term and tap **Search Synced Content**. This searches all content within the local cache:



## MANAGING SETTINGS

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



2. In the **Sync Control** section, configure the following settings as preferred:
  - a) **Global Sync Limit:** This setting specifies how much local storage on the iPad 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. Unlimited

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*In Colligo Briefcase Lite, you are limited to 50 MB of storage space to sync content. Colligo Briefcase Pro and Enterprise allow you to sync an unlimited amount of content.*

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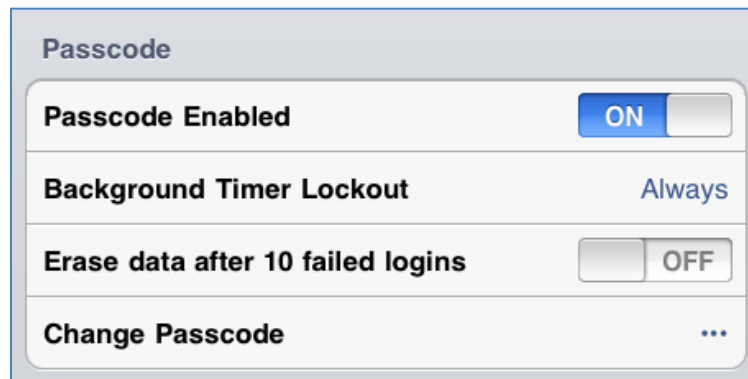
- b) **Alert on Favorite updated:** This setting lets you choose if you want to receive an alert when an item that you have marked as a favorite is updated. Tap to choose **ON** or **OFF**.

- c) **Sync on 3G:** This setting lets you prevent any syncing on 3G so your data plan isn't used up. Tap to choose **ON** or **OFF**. If you choose to turn this setting off, you can still sync data through a wireless internet connection.
3. In the **Passcode** section, tap the **Passcode Enabled** field. The **Enter Passcode** screen displays:



*The passcode feature is not available in Colligo Briefcase Lite.*

- 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 in the bottom left of the screen to display the **About Colligo Briefcase** screen:



Tap the **Colligo Website** button to launch [www.Colligo.com](http://www.Colligo.com).

Tap the **Feedback** button to launch an email. The **To:** field is populated with the [BriefcaseFeedback@colligo.com](mailto: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, and the screen capture of the screen you were most recently viewing is inserted.

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

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

**APPENDIX I: SUPPORTED FILE TYPES**

<b>Supported File Types</b>	<b>Common Icon Name</b>
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

<b>Unsupported File Types</b>	<b>Common Icon Name</b>
Zip	Zip File
html	html File
htm	html File
css	css File
All others	Unknown File