

# Colligo Briefcase 3.0

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Enterprise, Pro, and Lite Editions

User Guide  
iPad



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## INTRODUCTION

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

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
- View and edit document and file properties, including metadata
- Enter and submit InfoPath forms, with support for signatures
- 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.

## Key Features

- View SharePoint files directly on your mobile device, 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
- View and edit document and file properties, including metadata
- Enter and submit InfoPath forms, with support for signatures
- Secure access to Briefcase using passcode protection

## 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 IOS5 or higher

- iPad, iPad 2, or iPad 3 with WiFi (3G/4G optional)
- iPod Touch 4th Generation
- iPhone 3GS and above

### **SharePoint Platforms Supported**

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

## **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
- Setting a global sync limit to over 50 MB
- Specifying which site lists and libraries to sync
- Setting a Passcode Lock
- Editing item metadata
- Deleting items and deleting attachments in list items
- Checking items in and out
- Creating new list items
- Uploading new items to SharePoint
- Creating and editing InfoPath forms

## **COLLIGO BRIEFCASE PRO**

Colligo Briefcase Pro is available from the Apple store and does not have the above limitations.

## **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
- Optional re-branding

## **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/iPhone/iPod
- 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/iPhones/iPods in the enterprise

## OVERVIEW

This user guide explains how to use Colligo Briefcase on iPad. View the user guide in Colligo Briefcase on an iPhone or iPod for instruction on how to use Colligo Briefcase on those devices.

## INSTALLING COLLIGO BRIEFCASE LITE OR PRO

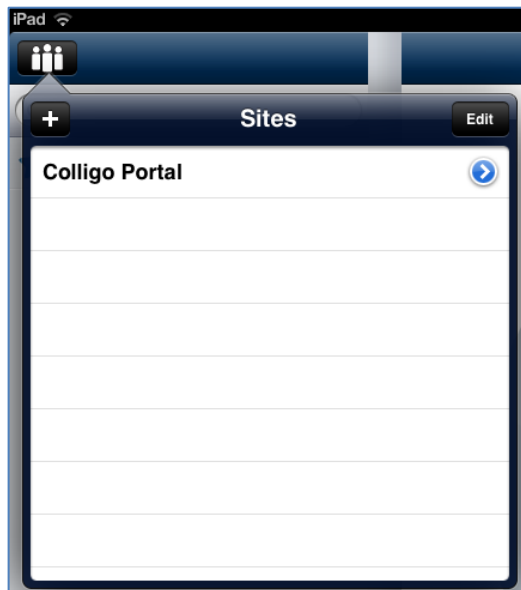
To install Colligo Briefcase Lite or Colligo Briefcase Pro, connect to the App Store and download the latest version to your iPad. After Colligo Briefcase is installed, tap the **Colligo Briefcase Lite** icon  or the **Colligo Briefcase Pro** icon  to open the application. You can now add a SharePoint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


## MANAGING SHAREPOINT SITES

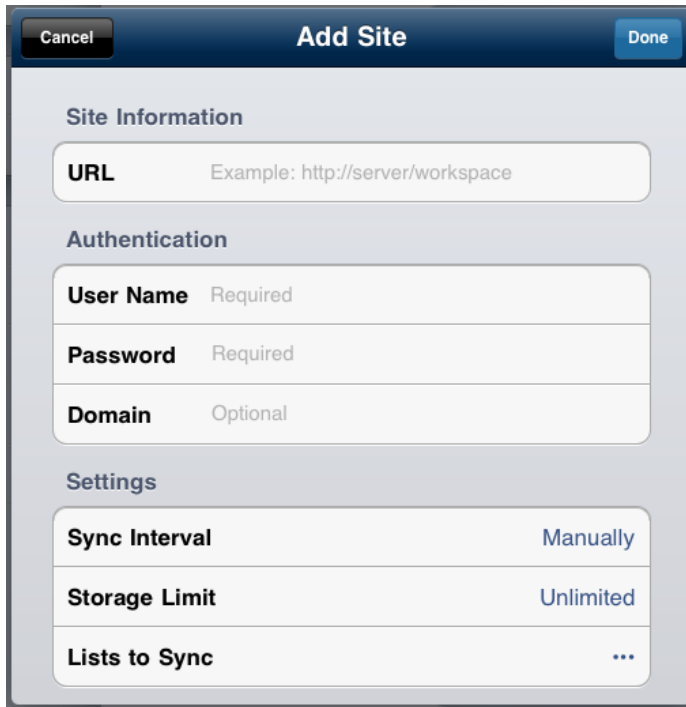
Colligo Briefcase lets you add, edit, and remove SharePoint sites.

### Adding a Site

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



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




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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. 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 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:




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*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.*

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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:

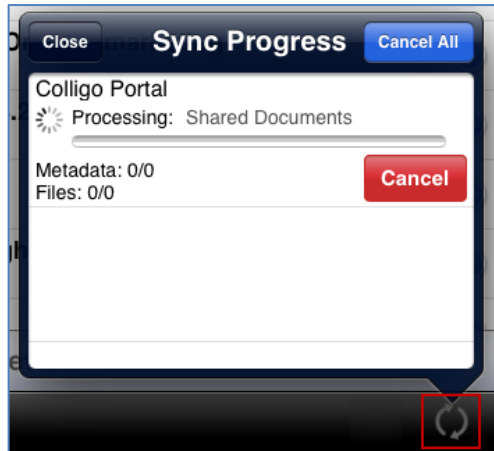
- Site Pages
- Site Assets
- Style Library
- Form Templates

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 right 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 8 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:

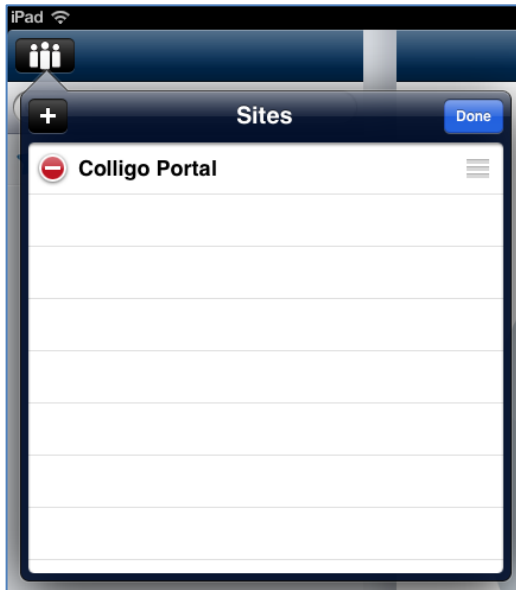
1. Tap the sites icon  to display your list of sites.
2. Tap the blue icon  beside the site you want to edit:  
The **Edit Site** dialog displays.
3. See steps 3 to 6 in **Adding a Site** for a description of the fields.

## Deleting a Site

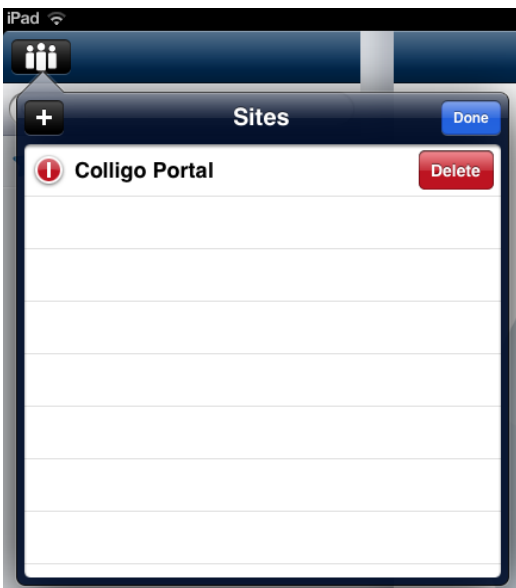
To delete a site:

1. Tap the sites icon  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 circle 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 sites icon  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 sites icon  and tap the site you want to view. The libraries and lists associated with the site display in the left column.

## NAVIGATING SUBSITES, LISTS, AND LIBRARIES

1. After you add a SharePoint site, the sub-sites, 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. 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 the right column.

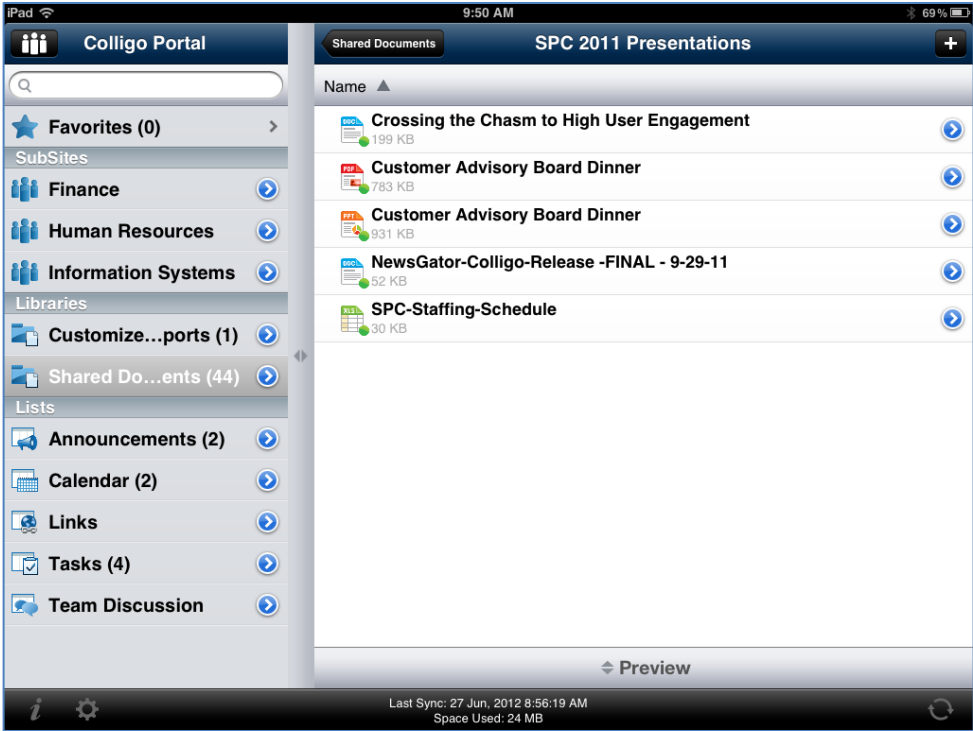
**NOTE:** If the item has a green circle icon, it means the item is synced and is viewable.

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

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 [SPC 2011 Presentation]. You can tap the back button to return to the previous folder level.

Applying Views to Lists or Libraries

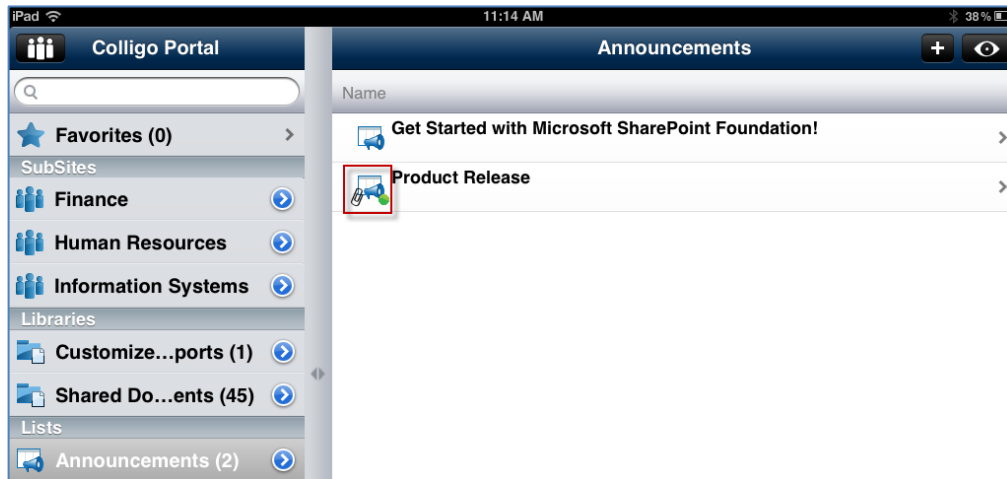
To filter your view the items contained in a list or library, tap the  icon in the top right corner of the screen. A drop-down list of available views displays. Choose your preferred option from the list of available choices:



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

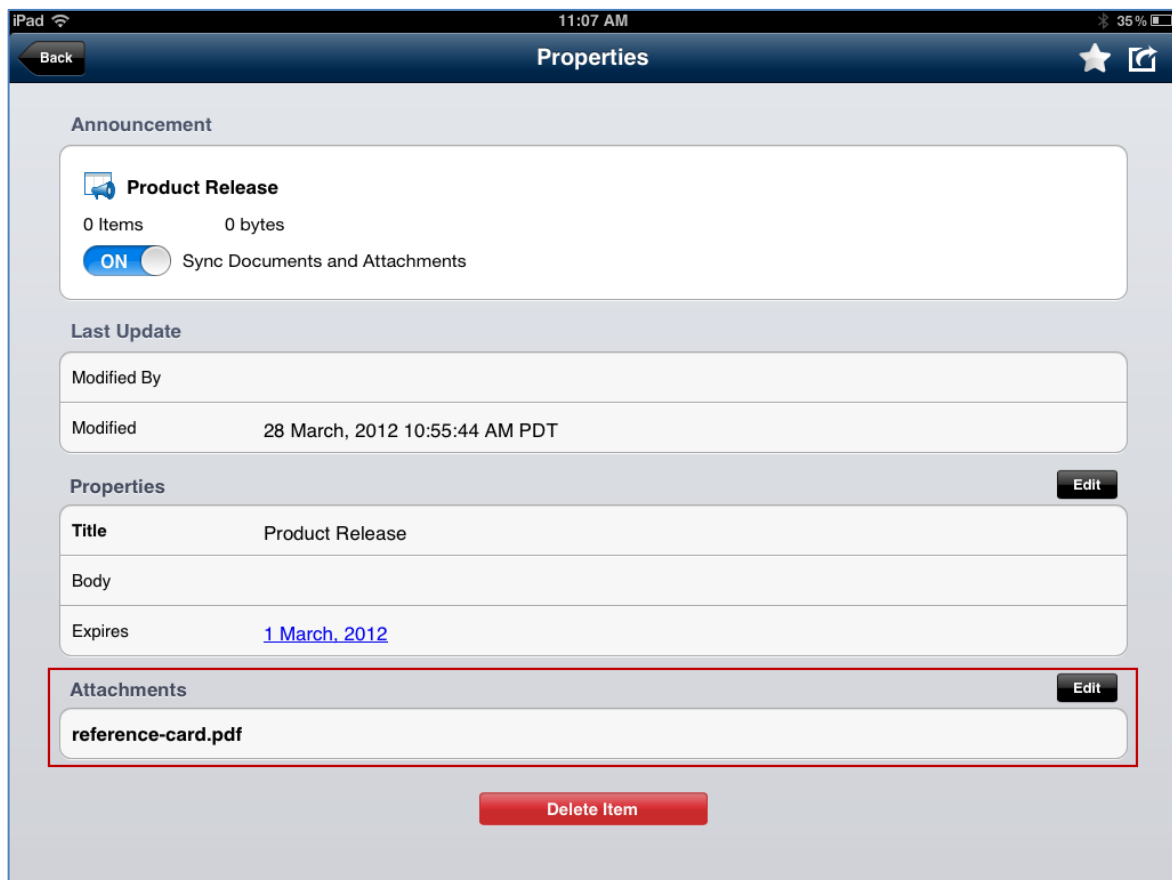
## Viewing Attachments in Lists

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 row to display the item's properties.

The **Properties** screen displays:

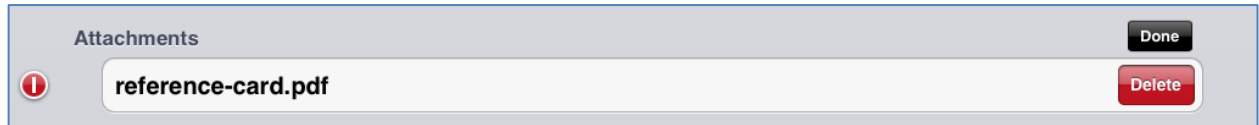


Any attachments display in list form in the **Attachments** section. To view the content of the attachment, tap the file name to display the document in a separate screen.

## Deleting Attachments

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.

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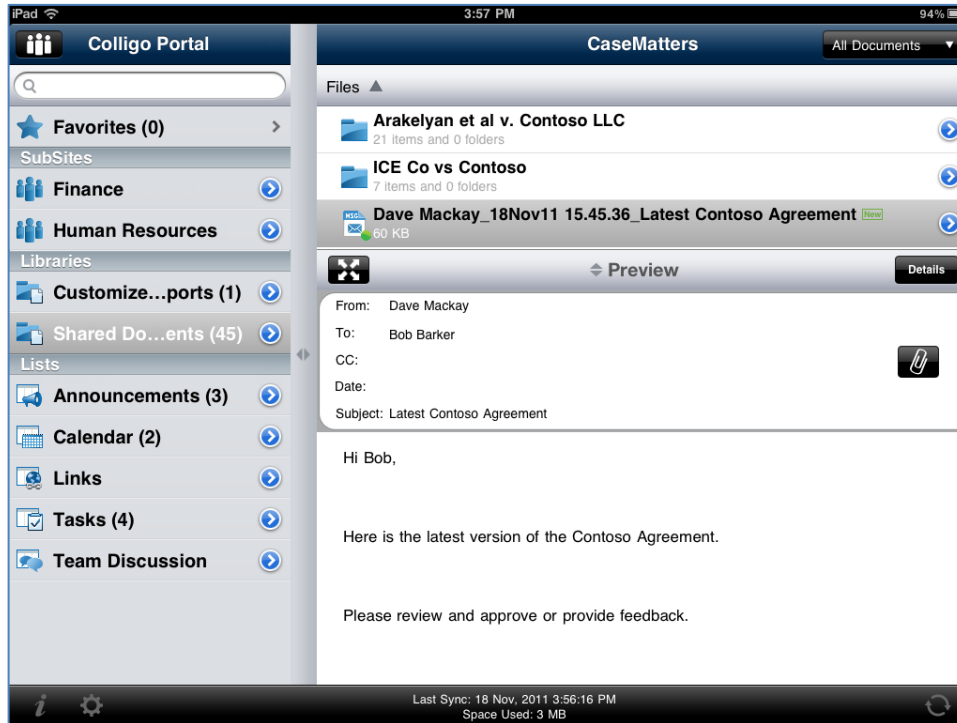
*In Colligo Briefcase Lite, you cannot delete attachments in list items.*

---

## 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.

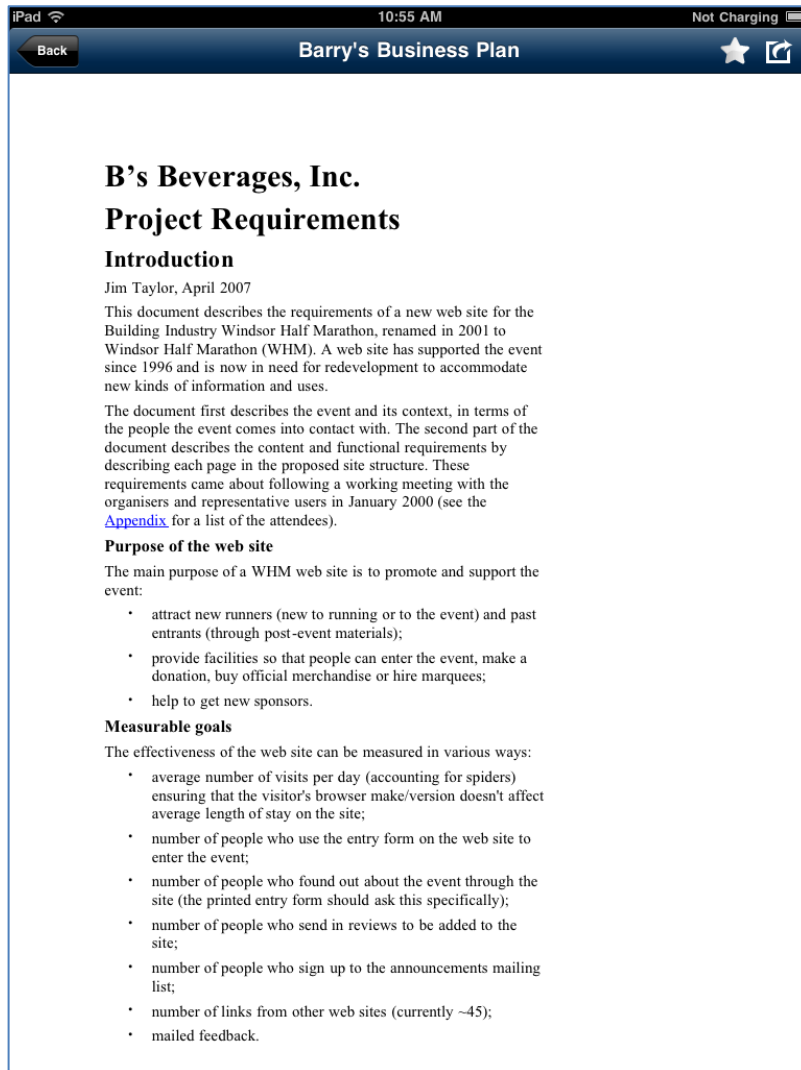
Tap the **Details** button to view the details of the item.

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:



## Creating, Viewing, and Editing 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 Colligo Briefcase Lite, InfoPath forms are not supported.*

## 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:

| No    | Description | Qty. | Unit Price | Extended Price | Expense Account |
|-------|-------------|------|------------|----------------|-----------------|
| 1     | Consulting  | 2    | \$500      | \$1 000        |                 |
| Total |             |      |            | \$1 000        |                 |

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:

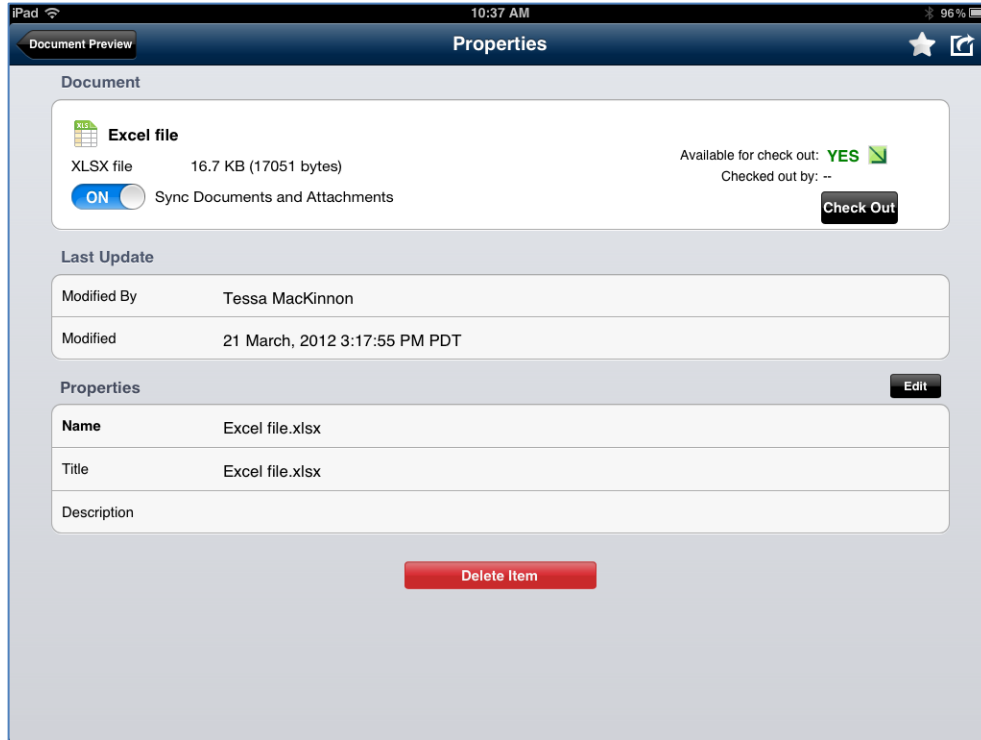
1. Tap the icon in the InfoPath form list or library.  
For Lists, select **List Item** from the available actions.  
The InfoPath form displays on a new page:


| No    | Description | Qty. | Unit Price | Extended Price | Expense Account |
|-------|-------------|------|------------|----------------|-----------------|
| 1     | Consulting  | 2    | \$500      | \$1 000        |                 |
| Total |             |      |            | \$1 000        |                 |


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

### 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

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.

*In Colligo Briefcase Lite, you cannot check items out.*

## Deleting an Item

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.

*In Colligo Briefcase Lite, you cannot delete items.*

## Editing Item Properties

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:

| Properties  |                 | Done |
|-------------|-----------------|------|
| Name        | Excel file.xlsx |      |
| Title       | Excel file.xlsx |      |
| Description |                 |      |
| Name        | Excel file      |      |

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:

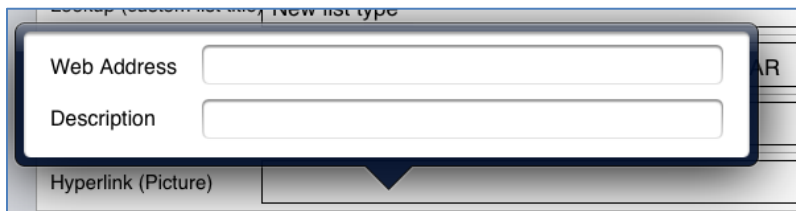
- If the field is text based, the keyboard displays
- If the field is Yes/No, tap once to toggle between them
- For date fields, tap once to display the following and scroll to the preferred date:



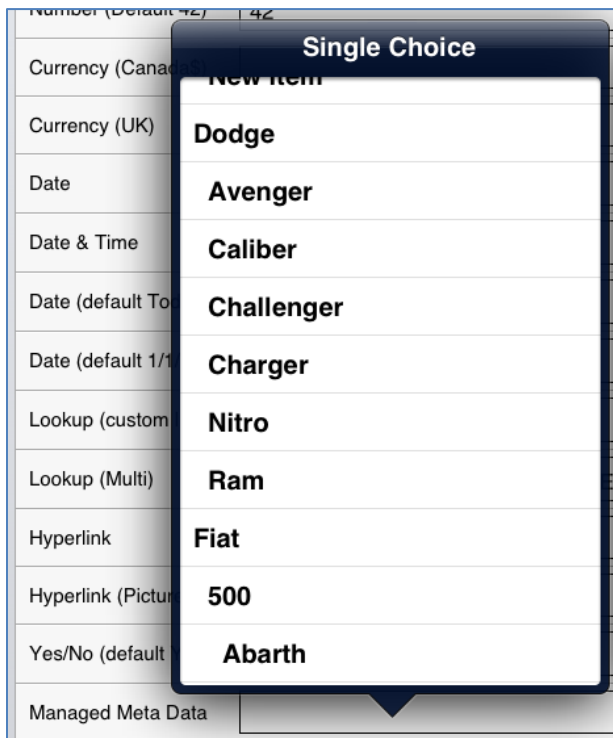
- For Date and Time fields, tap once to display the following and scroll to the preferred date and time:



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



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



*In Colligo Briefcase Lite, you cannot edit item properties.*

## Viewing Item Properties in Grid View

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:

| Demo Site | Shared Documents |                        |              |                          |                     |   |
|-----------|------------------|------------------------|--------------|--------------------------|---------------------|---|
|           | 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 |                  |                        |              |                          |                     |   |

You can 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 item contents on a separate screen.


## Editing Item Properties in Grid View

While you are looking at a library's item in grid view, you can edit the properties.

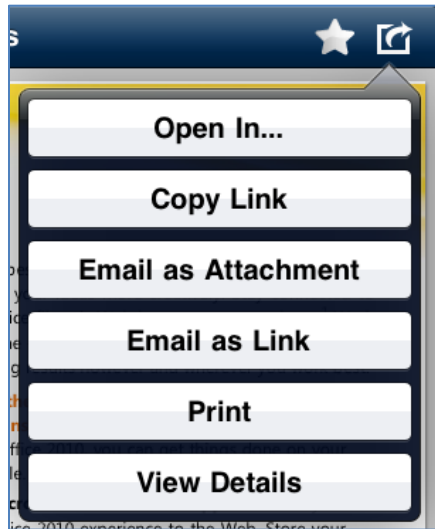
To do so, tap the field in the item line to select it, then double-tap to edit.

**NOTE:** not all properties are editable in grid view.

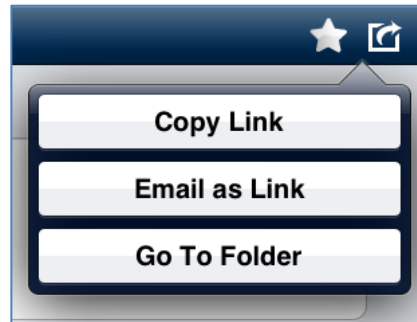
## Managing Items

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. Libraries and Lists have different options:

Action items for Libraries:



Action items for Lists:




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*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.*

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### 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.

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.

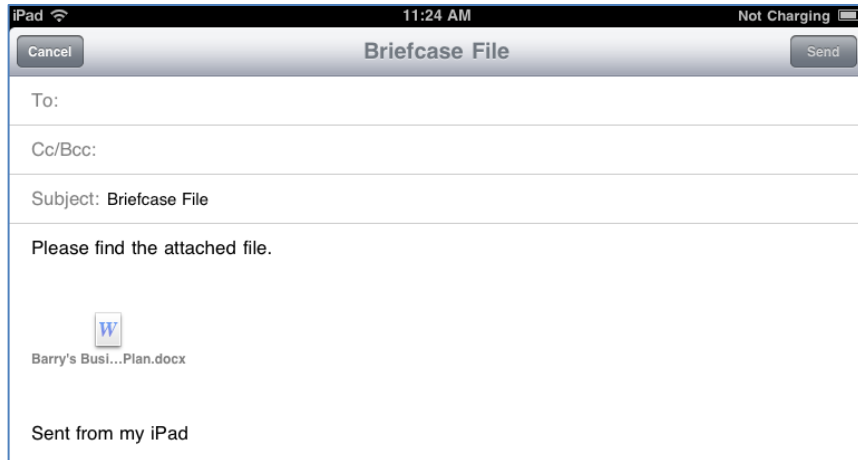
### Copying a Link to the Item

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

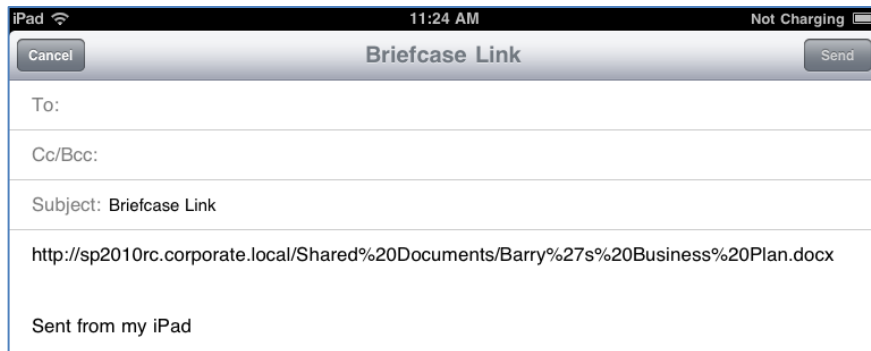
Choose the **Email as Attachment** option to launch a new email with the item embedded as an attachment. You must have an email program present on your iPad for this option to display:





### 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 Details


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

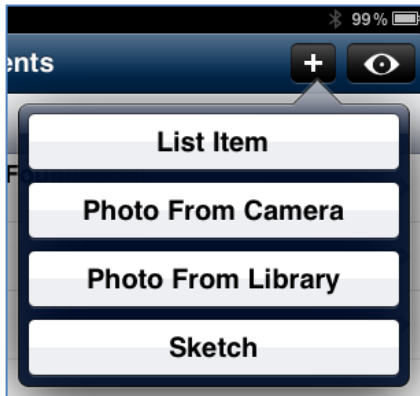
### Go to Folder

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

## Creating New List Items

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.

---

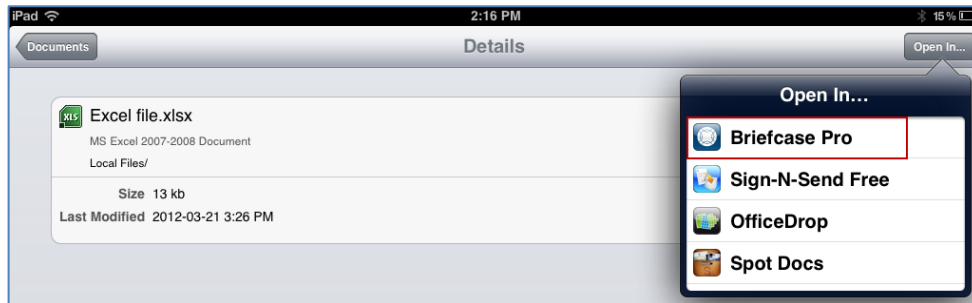
*In Colligo Briefcase Lite, you cannot create new List items.*

---

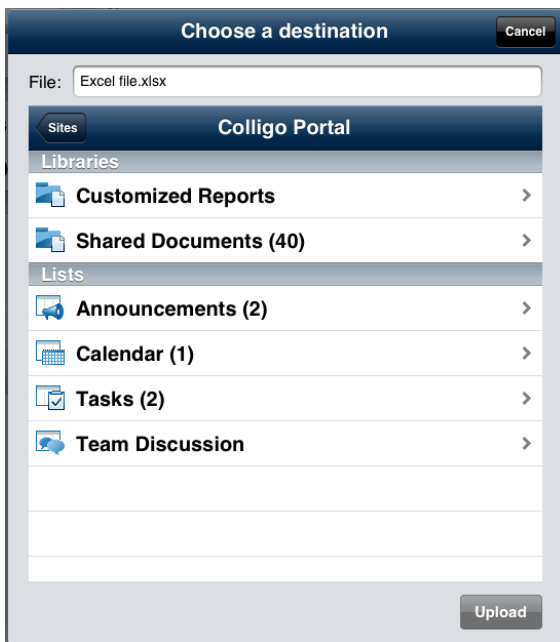
## Uploading Items to SharePoint

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 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.

---

*In Colligo Briefcase Lite, you cannot upload items to SharePoint.*

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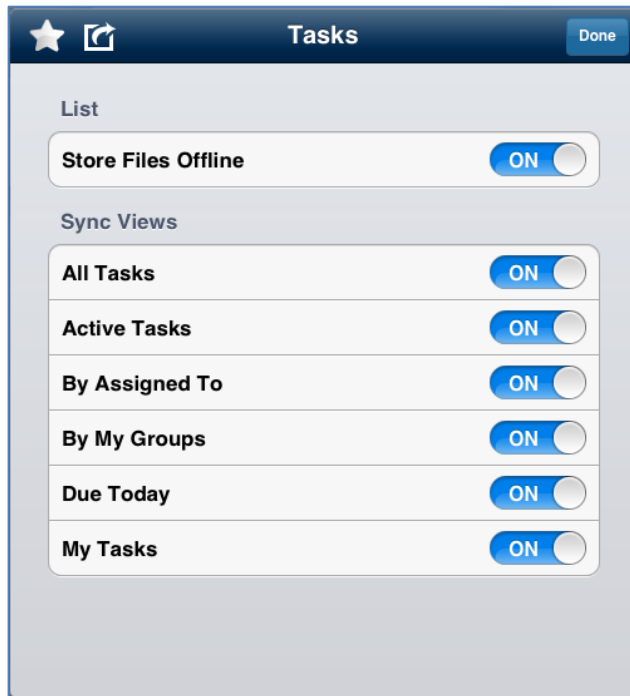
## Managing Folder Settings



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

## RESOLVING SYNCHRONIZATION CONFLICTS

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 beside the sync button.

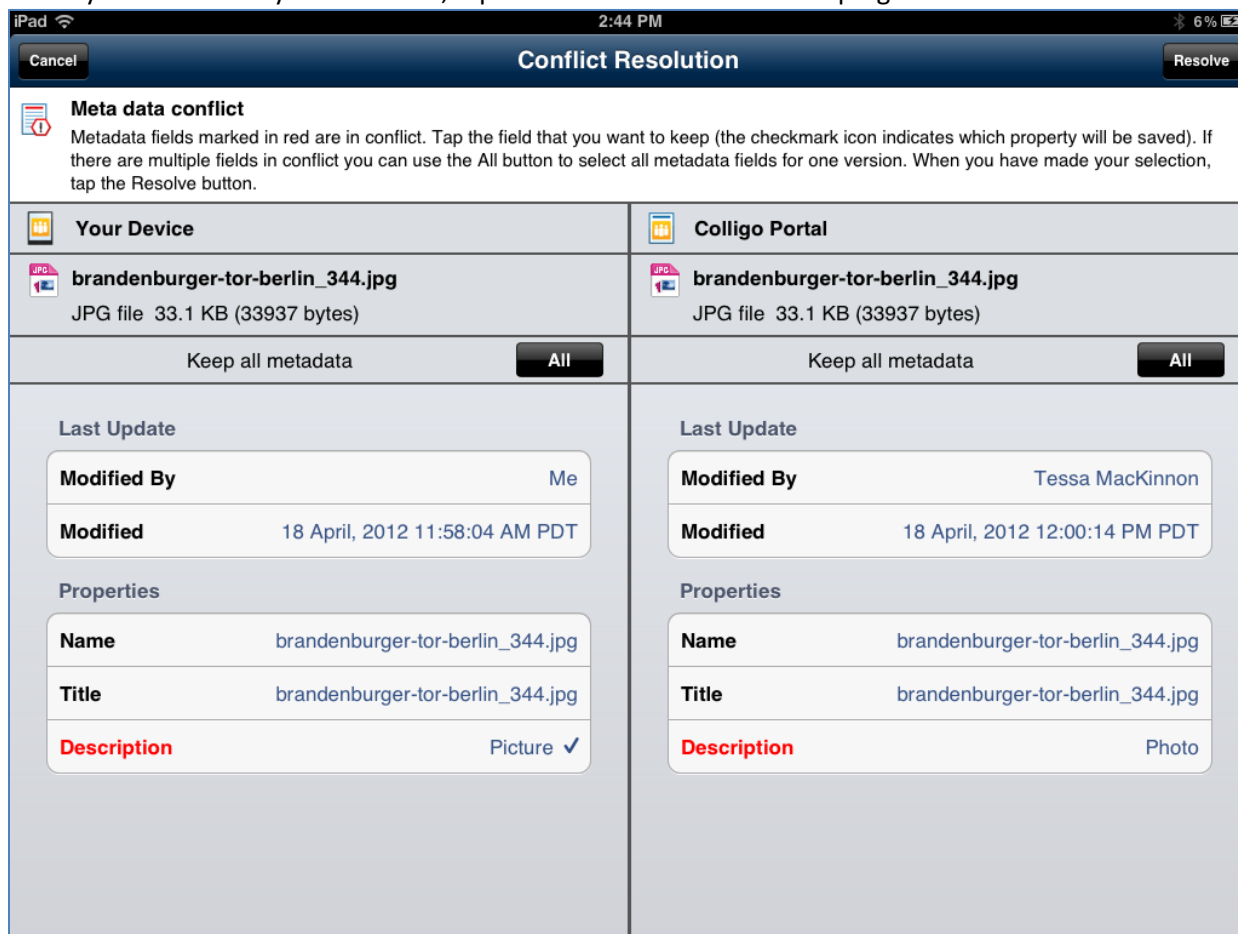
Tap the conflict icon to display the list of sync issues and tap the item you want to resolve:



## Metadata Conflict

The **Conflict Resolution** screen displays all conflicted fields marked in red. To resolve the conflict:

1. Tap the field that you want to keep (the checkmark icon  indicates which property will be saved). If there are multiple fields in conflict, use the **All** button to select all metadata fields for one version.
2. When you have made your selection, tap the **Resolve** button in the top right of the screen.



The screenshot shows an iPad screen with the 'Conflict Resolution' app. At the top, there's a status bar with 'iPad', signal strength, '2:44 PM', and battery level '6%'. The app has a dark blue header with 'Conflict Resolution' in white, and 'Cancel' and 'Resolve' buttons on either side. Below the header is a 'Meta data conflict' section with a red warning icon and text explaining the conflict resolution process. The main area is split into two columns: 'Your Device' and 'Colligo Portal'. Both columns show the same file 'brandenburger-tor-berlin\_344.jpg' (JPG file, 33.1 KB). Below the file name, there are 'Last Update' and 'Properties' sections. In the 'Your Device' column, the 'Modified By' is 'Me' and the 'Description' is 'Picture' with a checkmark. In the 'Colligo Portal' column, the 'Modified By' is 'Tessa MacKinnon' and the 'Description' is 'Photo'. At the bottom of each column, there are 'Keep all metadata' and 'All' buttons.

| Your Device  | Colligo Portal   |
|--|--|
| <b>brandenburger-tor-berlin_344.jpg</b><br>JPG file 33.1 KB (33937 bytes)  | <b>brandenburger-tor-berlin_344.jpg</b><br>JPG file 33.1 KB (33937 bytes)  |
| Keep all metadata <b>All</b>   | Keep all metadata <b>All</b>   |
| <b>Last Update</b><br>Modified By: Me<br>Modified: 18 April, 2012 11:58:04 AM PDT  | <b>Last Update</b><br>Modified By: Tessa MacKinnon<br>Modified: 18 April, 2012 12:00:14 PM PDT                                       |
| <b>Properties</b><br>Name: brandenburger-tor-berlin_344.jpg<br>Title: brandenburger-tor-berlin_344.jpg<br><b>Description</b> : Picture ✓ | <b>Properties</b><br>Name: brandenburger-tor-berlin_344.jpg<br>Title: brandenburger-tor-berlin_344.jpg<br><b>Description</b> : Photo |

## Deletion Conflict

To resolve a deletion conflict:

1. Use the **Preview** button to view the changes that have been made since your last sync.
2. 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.

Conflict Resolution

**Deletion conflict**

You have marked this file for deletion but the version on the server has changed since your last sync. Use the Preview button to view the changes that have been made, then use the Confirm Delete or Cancel Delete buttons as preferred.

**Your Device**

**Office2010QA.doc**  
DOC file 986.5 KB (1010176 bytes)

**Confirm Delete**

**Colligo Portal**

**Office2010QA.doc**  
DOC file 986.5 KB (1010176 bytes)

**Cancel Delete**

**Last Update**

**Modified By** Me

**Modified** 18 April, 2012 2:54:21 PM PDT

**Properties**

**Name** Office2010QA.doc

**Title**

**Description** Tessam

**Last Update**

**Modified By** Tessa MacKinnon

**Modified** 18 April, 2012 2:54:21 PM PDT

**Properties**


**Name** Office2010QA.doc

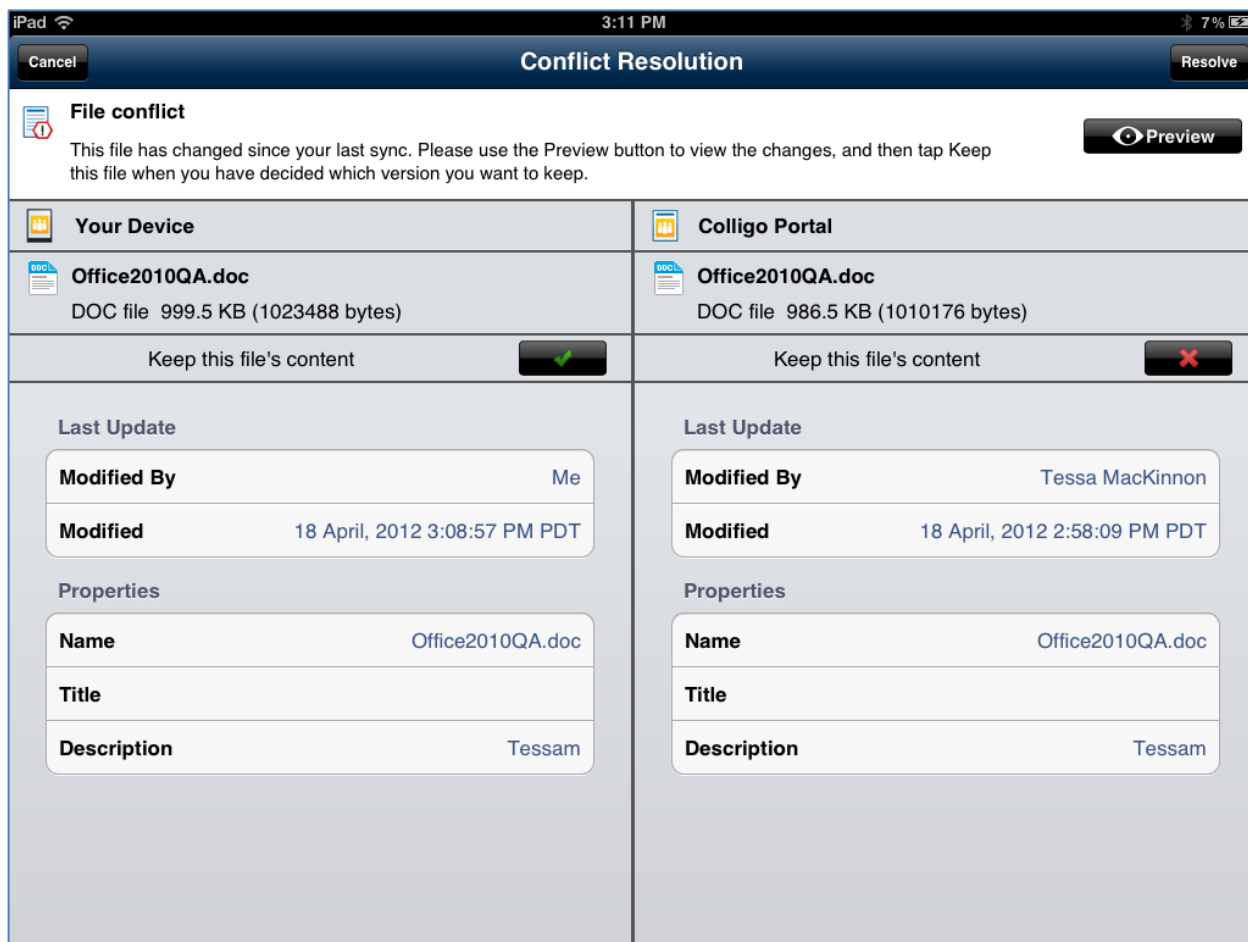
**Title**

**Description** Tessam



## File Conflict

To resolve a File conflict:

1. Use the **Preview** button to view the differences between the file on Briefcase and the file on the server.
2. 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.
3. Tap **Resolve**.



The screenshot shows an iPad screen with the 'Conflict Resolution' dialog. At the top, there are 'Cancel' and 'Resolve' buttons. Below the title bar, a message states: 'File conflict. This file has changed since your last sync. Please use the Preview button to view the changes, and then tap Keep this file when you have decided which version you want to keep.' A 'Preview' button is on the right. The main area is split into two columns: 'Your Device' and 'Colligo Portal'. Both columns show a file named 'Office2010QA.doc' with its size in bytes. Below the file name, there is a 'Keep this file's content' button. In the 'Your Device' column, this button has a green checkmark icon. In the 'Colligo Portal' column, it has a red 'X' icon. Below these buttons, each column has a 'Last Update' section with 'Modified By' and 'Modified' dates, and a 'Properties' section with 'Name', 'Title', and 'Description' fields.

| Your Device  | Colligo Portal   |
|--|--|
| <b>Office2010QA.doc</b><br>DOC file 999.5 KB (1023488 bytes)   | <b>Office2010QA.doc</b><br>DOC file 986.5 KB (1010176 bytes)   |
| Keep this file's content  | Keep this file's content  |
| <b>Last Update</b><br>Modified By: Me<br>Modified: 18 April, 2012 3:08:57 PM PDT                           | <b>Last Update</b><br>Modified By: Tessa MacKinnon<br>Modified: 18 April, 2012 2:58:09 PM PDT                |
| <b>Properties</b><br>Name: Office2010QA.doc<br>Title:<br>Description: Tessam                               | <b>Properties</b><br>Name: Office2010QA.doc<br>Title:<br>Description: Tessam                                 |




## UPLOADING PHOTOS

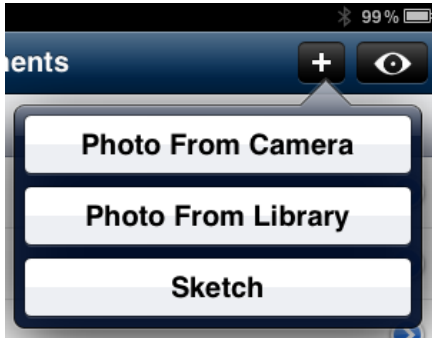
You can upload an existing photo on your iPad or take a new photo and upload it to a library or list.

### Uploading a Photo from the Camera

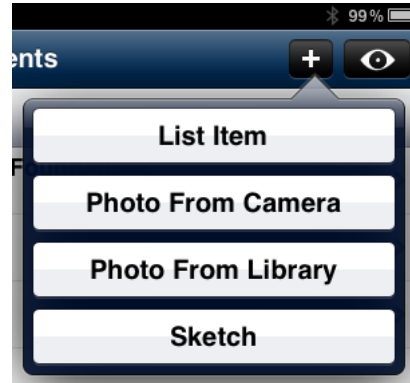
To upload a photo from the iPad camera:

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:

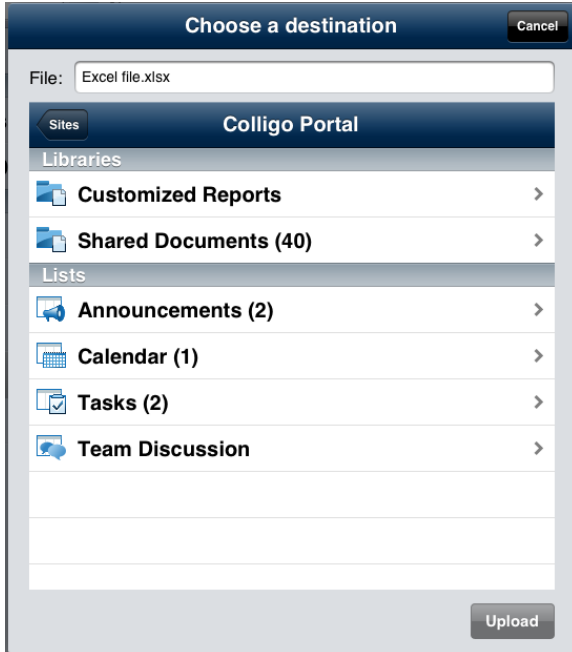


Action menu for Lists:



2. If you choose **Photo From Camera**, the iPad camera launches.
3. Take the photo and tap the **Use** button in the bottom right corner.


The **Choose a destination** dialog displays:

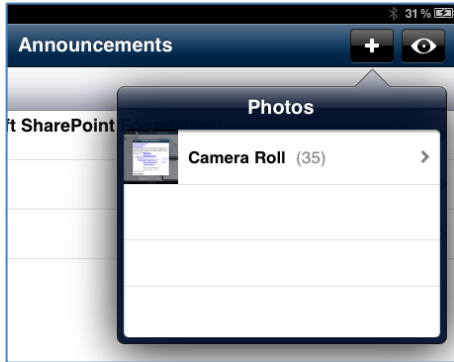


4. Navigate to the site list or library where you want to save the photo.  
**NOTE:** If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.
5. Tap **Upload** or **Attach**. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.

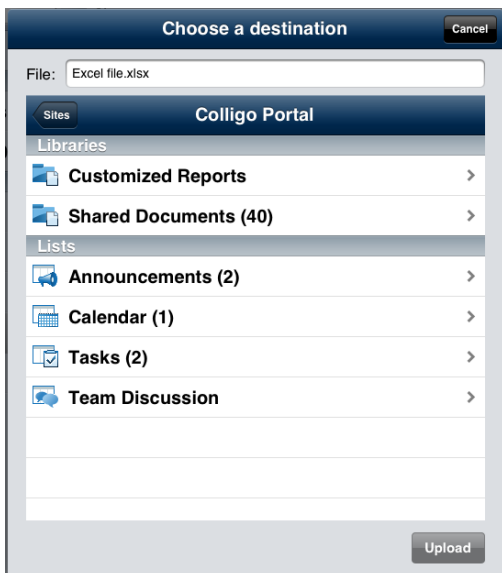
## Uploading a Photo from the Library

To upload a photo from the iPad 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:

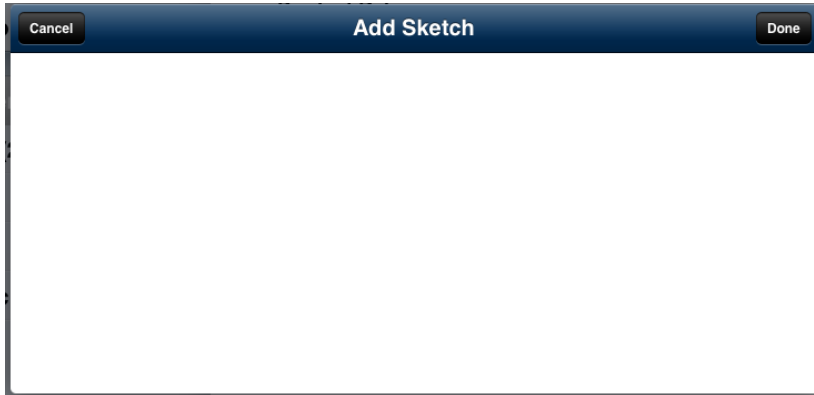


6. Navigate to the site list or library where you want to save the photo.  
**NOTE:** If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.
7. Tap **Upload** or **Attach**. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.

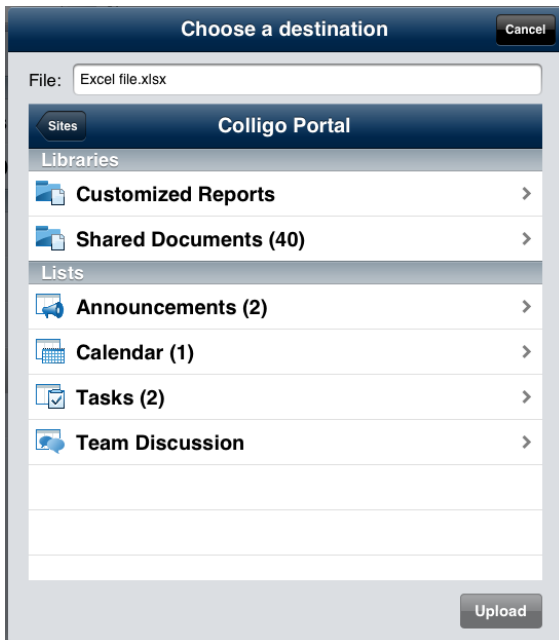
## Uploading a Sketch

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**. 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 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 Favorites

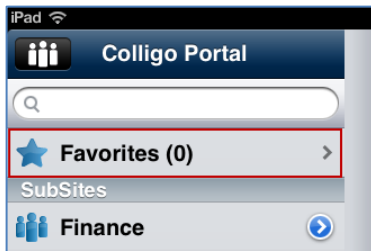
To add items you view frequently to your Favorites list:

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.

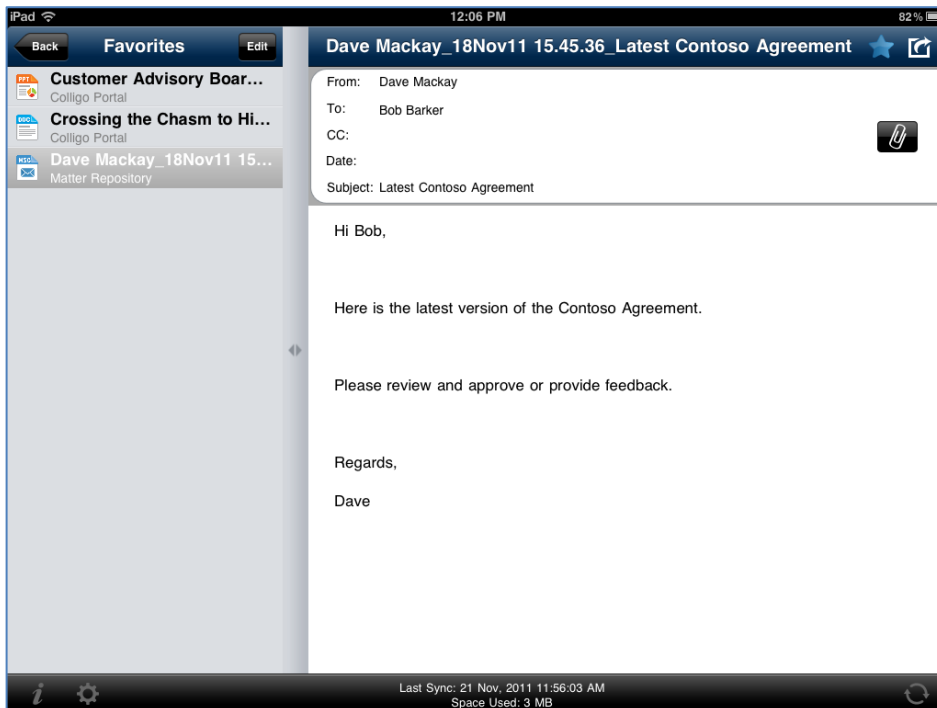
**NOTE:** For information about adding a folder your Favorites list, see **Managing Folder Settings**.

### Viewing Favorites

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



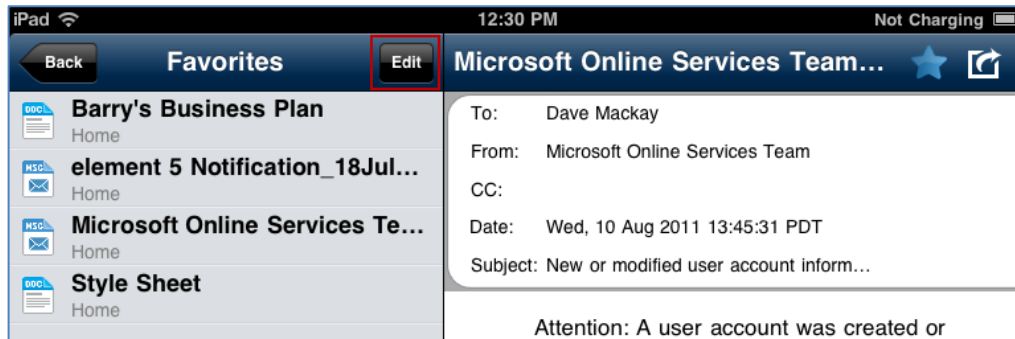
A list of your favorite items display, with the selected item content displayed in the preview pane beside it:



## Editing Favorites

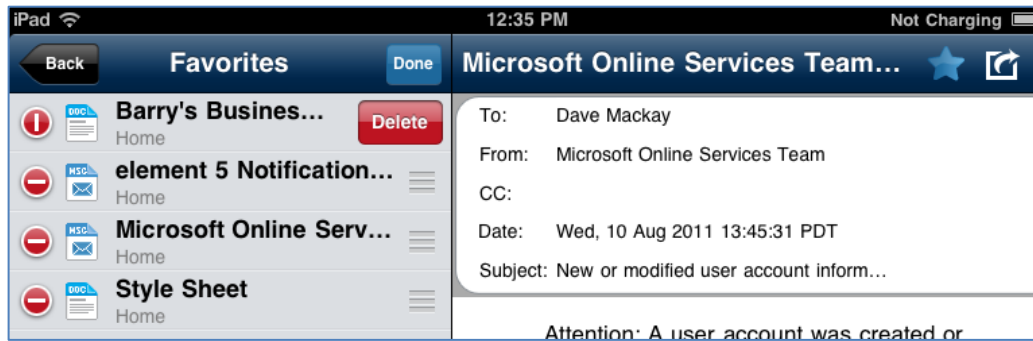
To delete or re-order your Favorites:


1. Tap the **Edit** button.



The list displays with a red icon beside each item.

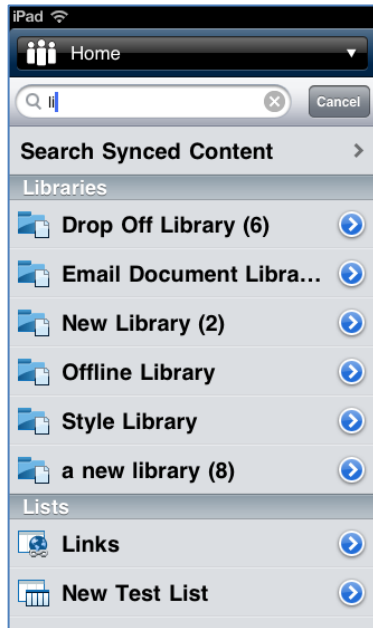
2. Tap the red icon beside the item you want to delete.  
The **Delete** button displays beside the item name:



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

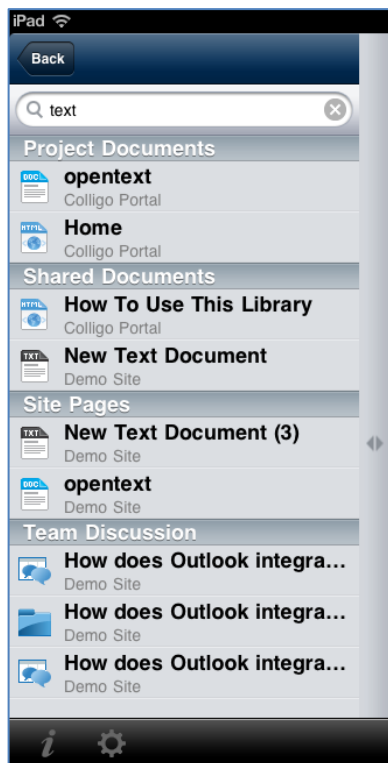
## SEARCHING SHAREPOINT LISTS AND LIBRARIES

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 storage 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. 2 GB
    - x. 8 GB
    - xi. 16 GB
    - xii. 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.*

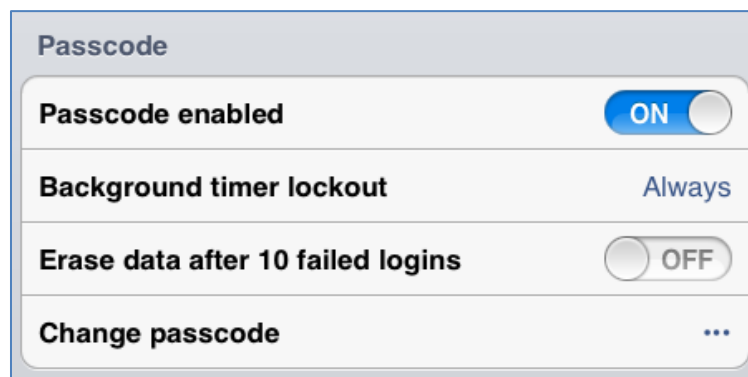
---

- 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 lets you prevent any syncing on 3G/4G 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**

| 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         |
| All others             | Unknown File     |