User Guide



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# Introduction

Colligo Administrator is the enterprise solution for managing Colligo software across all your users' devices. Colligo Administrator allows you to centrally administer your users' SharePoint sites, folders and favorites, making it easy for users to file emails and documents to the right locations and access the right content without having to understand SharePoint. Non-technical administrators can deploy and manage Colligo software all from right within a SharePoint interface.

Colligo Administrator is a system for managing and configuring Colligo products from a SharePoint server. Colligo Administrator consists of two components: the administrative server, which is a SharePoint site built on standard SharePoint (SharePoint 2010 or later), and the administrative client, which is built into Colligo's desktop and mobile client software products.

### **Key Features**

- **Deploy:** Put email and document management into action across the enterprise
- Manage: Configure who has access to what

### **Benefits**

- Simplify the deployment and administration of Colligo products for large groups of users
- Reduce training and support resources since users never need to configure Colligo products
- Enable non-IT users to easily grant or revoke employee access to SharePoint document libraries, lists and folders
- Ensure that the same SharePoint content is available automatically regardless of device or software version

### **Technical Requirements**

Colligo Administrator runs on a standard SharePoint server, with no additional server software components required. Colligo applications are configured to communicate with Colligo Administrator via a license key. It is recommended that Colligo Administrator be put in its own site collection. As a minimum, you must be a SharePoint site designer but the Owner role is required to create and set up the site.

Colligo Administrator requires SharePoint Server 2010 or 2013.

Colligo Administrator requires a specific license key. Please contact <u>sales@colligo.com</u> for more information.

# **Connecting Colligo Administrator with Colligo Applications**

Colligo Administrator allows you to control the Colligo content your users can see. There are two parts to the setup process:

- 1. Configuring Colligo Administrator to determine what content is accessible (setting up sites, folders and favorites, control groups, applications, configuration settings, and Launchpad configurations).
- 2. Configuring Colligo applications (Colligo Email Manager, Colligo Briefcase, and Colligo Contributor Pro) to communicate with Colligo Administrator.

**NOTE**: To enable the functionality of Colligo Administrator, users must have the appropriate license key installed on the client side of the Colligo application.

### **Configuring Contributor Pro 6.0**

To connect to the administrative site, you can use the ADMIN\_SITE\_URL msi property and set the value to the URL of your Administrator site. This creates a registry key in one of the following locations:

Operating Environment	Registry Key Location
64-bit OS	HKEY_LOCAL_MACHINE /Software/Wow6432Node/Colligo/Contributor
32-bit OS	HKEY_LOCAL_MACHINE/Software/Colligo/Contributor/

The key has the following values:

- Value name: AdministrativeSiteUrl
- Value data: the URL of the site you have defined

Edit String
Value name:
AdministrativeSiteUrl
Value data:
http://portal.colligo.com/sites/demo/colligoadministration
OK Cancel

### **Configuring Colligo Briefcase for iOS**

The Colligo Administrator site links to all iPads/iPhones/iPod Touches connected to your organization's network. All users with Colligo Briefcase will be connected to the Colligo Administrator site.

When users launch Colligo Briefcase, they will be prompted for their username and password for the Administrator site. Typically, these credentials will be the same as their Active Directory login. If the credentials are incorrect, users cannot access Colligo Briefcase.

Once users are logged in, the settings defined in Colligo Administrator, for each specific user or user group, apply to Colligo Briefcase.

# Importing the Administrator Site Template (SharePoint 2010)

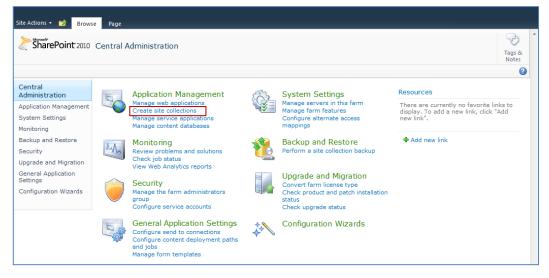
There are nine lists in Colligo Administrator:

- 1. Sites: this list determines which sites your users can see
- 2. Favorites & Folders: this list determines which SharePoint locations are Favorites or Folders and/or Offline locations
- 3. **Control Group**: this list determines which users cannot add, modify, or delete favorite/folder locations
- 4. Applications: this list determines which Colligo applications the Administrator site is applied to
- 5. **Configuration**: this list determines which settings apply to the targeted Colligo application
- 6. Launchpad Control Group: this list determines which users cannot add, modify, or delete the Launchpad settings, as set in the Launchpad Groups, Buttons, and Items lists.
- 7. Launchpad Groups: this list sets the names of the Launchpad Groups for specified users.
- 8. Launchpad Buttons: this list sets the names of the Launchpad Buttons that are attached to specified Groups.
- 9. Launchpad Items: this list sets the names of the Launchpad Items that are attached to specified Buttons.

Colligo provides an Administrator Site template (**Colligo Administrator Site.wsp**) that sets up all lists. If you choose to manually set up your own lists, please see **Appendix I**.

To import the site template:

1. In Central Administration, under the Application Management group, select Create site collections.



#### The Create Site Collection screen displays:

Site Actions 👻 🐋		
SharePoint 2010	Central Administration → Create Site Collection Use this page to create a new top-level Web site.	Tags & Notes
Central Administration Application Management System Settings Monitoring Backup and Restore Security	Web Application Select a web application. To create a new web application go to New Web Application page.	OK Cancel Web Application: http://v-sp2010/ •
Upgrade and Migration General Application Settings Configuration Wizards	Title and Description Type a title and description for your new site. The title will be displayed on each page in the site.	Title: Description:
	Web Site Address Specify the URL name and URL path to create a new site, or choose to create a site at a specific path. To add a new URL Path go to the Define Managed Paths page.	URL: http://v-sp2010 /my/personal/ <pre> •</pre>
	Template Selection A site template determines what lists and features will be available on your new site. Select a site template based on the descriptions of each template and how you intend to use the new site. Many aspects of a site can be customized after creation. However, the site template cannot be changed once the site is created.	Select a template: Collaboration Meetings Enterprise DataFacet Publishing Custom Team Site Blank Site Document Workspace Blog Group Work Site Visio Process Repository A site for teams to quiddy organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.
	Primary Site Collection Administrator Specify the administrator for this site collection. Only one user login can be provided; security groups are not supported.	User name:
	Secondary Site Collection Administrator Optionally specify a secondary site collection administrator. Only one user login can be provided; security groups are not supported.	User name:
	Quota Template Select a predefined quota template to limit resources used for this site collection. To add a new quota template, go to the Manage Quota Templates page.	Select a quota template: No Quota  Storage limit: Number of invited users:
		OK Cancel

- 2. Enter the following information:
  - a. Web Application: choose your preferred web application from the drop-down list
  - b. Title and Description: enter a title and description for your site
  - c. **Web Site Address**: choose the URL path from the drop-down menu, and enter the name of your site in the **URL** field
  - d. Template Selection: click the Custom tab and choose Select Template Later
  - e. **Primary Site Collection Administrator**: enter the user who is the primary site collection administrator
  - f. **Secondary Site Collection Administrator**: enter the user who is the secondary site collection administrator
  - g. Quota Template: choose a preferred quota template from the drop-down menu
- 3. Click OK.

The site is created and the following screen displays:

SharePoint 2010	Central Administration > Top-Level Site Successfully Created	Tags & Notes
		0
Central Administration	The new top-level site was created successfully with the specified URL. If you have permission to view the Web site, do so in a new browser window by clicking the URL. To return to SharePoint Central Administration, click OK .	, you can
Application Management	http://y-sp2010/sites/Administration	
	http://v-sp2010/sites/Administration	
Application Management System Settings Monitoring	http://v-sp2010/sites/Administration	
System Settings		
System Settings Monitoring Backup and Restore		
System Settings Monitoring Backup and Restore Security		
System Settings Monitoring		

4. Click the new site link to display the **Template Selection** screen:

Site Actions 🔹 📂	ion → Template Selection	Tag No	tes	
All Site Content	Template Selection A site template determines what lists and features will be available on your new site. Select as the template based on the descriptions of each template and how you intend to use the new site. Many aspects of a site can be customized after creation. However, the site template cannot be changed once the site is created.	Select a template: Collaboration Meetings Enterprise DataFacet Publishing Team Site Blank Site Document Workspace Blog Group Work Site Visio Process Repository A site for teams to quiddy organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.		
	Solution Gallery You can apply a custom Site Template to this site. To do this, upload a solution file that contains a custom site template to the solution gallery, activate the solution, and select the template in the Template Selection section.	Solution Gallery		
		OK		

#### 5. Click the **Solution Gallery** link. The **Solutions** screen displays:

Site Actions 👻 🈏 Brow	Library Library						
	on → Solution Gallery Gallery to track user solut					Tags & Notes	-
			Sea	rch this site	P	?	
Recycle Bin	if your resource usage e	xceeds your quota. ge (Today)	lutions can consume r	esources and may be tem	porarily (	disabled	11
	Name Edi	it Modified	Status	Resource Usage			f
	There are no items in this view	w of the Solution Gallery. To a	add a solution, click "Uploa	d".			
							-

#### 6. Click the **Solutions** tab to display the ribbon:

	Library Tools
Site Actions 👻 🐋	Browse Solutions Library
Upload Browse Solution Office.com	Delete     Activate     Deactivate     Upgrade
New	Commands
All Site Content	Your resource quota is 300 server resources. Solutions can consume resources and may be temporarily disabled if your resource usage exceeds your quota.         Current Usage (Today)         Average Usage (Last 14 days)         Name       Edit         Modified       Status       Resource Usage
	There are no items in this view of the Solution Gallery. To add a solution, dick "Upload".

# 7. Click Upload Solution

The Solution Gallery – Upload Solution screen displays:

Solution Gallery - Upload Solution			
Upload Solution Browse to the solution you intend to upload.	Name:	Browse	
	OK	Cancel	

8. Click Browse and navigate to the Colligo Administration Site.wsp file that Colligo has provided.

#### 9. Click **OK**.

The Solution Gallery – Activate Solution screen displays:

Solution Gallery - Activate Solution		
View		
Edit Item X Delete Item	Activate	
Manage	Commands	
read, modify and delete your	r data. Colligo Administration Site	
Solution Id	{39480381-F0D4-4622-96DE-D7D1E15DD1E5}	
Title		
Description		
Created at 9/16/2011 4:07 PM by 1 Last modified at 9/16/2011 4:07 PM		

#### 10. Click Activate.

The .wsp file displays in the **Solutions** list:

Site Actions 🔹 🐋 Brow	rse Solutions Library n → Solution Gallery → Solutions ~					<b>P</b>
Use the Solution	Gallery to track user solutions.					Tags & Notes
				Search this site	م	?
All Site Content	Your resource quota is 300 server resources. Solu usage exceeds your quota. Current Usage (Today) Average Usage (Last 14 days)	tions can cons	ume resources and m	ay be temporarily disa	bled if your res	ource
	Name	Edit	Modified	Status	Resource Usa	ige
	Colligo Administration Site 📲 NEW		9/16/2011 4:07 PM	Activated	0.00	

11. Click the Administration link to return to the Template Selection screen:

Site Actions 👻 📩		
Administrati	ion → Template Selection	Tags & Notes
Recycle Bin	Template Selection A site template determines what lists and	Select a template:
All Site Content	Il Site Content A site template determines what lists and features will be available on your new site. Select a site template based on the descriptions of each template and how you intend to use the new site. Many aspects of a site can be customized after creation. However, the site template cannot be changed once the site is created.	Collaboration Meetings Enterprise DataFacet Publishing Custom Colligo Administration Site
	Solution Gallery	Solution Gallery
	You can apply a custom Site Template to this site. To do this, upload a solution file that contains a custom site template to the solution gallery, activate the solution, and select the template in the Template Selection section.	Solution Gallery
		ОК

- 12. In the **Select a Template** section, click the **Custom** tab and select the **Colligo Administration Site** template that you have just uploaded.
- 13. Click OK.

The Set Up Groups for this Site screen displays:

Site Actions 👻 🐋				
	n → Set Up Groups for this Site specify who can access your site. You can create new Sha	rePoint groups or re-use existing SharePoint	Tags & Notes	
Home			0	
Lists Colligo Sites Colligo Favorites & Folders Colligo Control Group	Visitors to this Site         Visitors can read content in the Web site. Create a group of visitors or re-use an existing SharePoint group.         Members of this Site         Members can contribute content to the Web site. Create a group of site members or re-use an existing SharePoint group.	<ul> <li>Create a new group</li> <li>Use an existing group</li> <li>Administration Members</li> <li>Create a new group</li> <li>Use an existing group</li> </ul>		
All Site Content			&,- 😰	E
	Owners of this Site Owners have full control over the Web site. Create a group of owners or re-use an existing SharePoint group.	<ul> <li>Create a new group</li> <li>Use an existing group</li> <li>Administration Visitors</li> </ul>		-
		ОК		]

14. Create or use existing groups to assign access permissions to the site, and click OK.

The **Home** tab of your Administration site displays. You can now begin to configure the Sites, Favorites and Folders, Control Groups, Applications, and Configuration settings for your users.

# Importing the Administrator Site Template (SharePoint 2013)

There are nine lists in Colligo Administrator:

- 1. Sites: this list determines which sites your users can see
- 2. **Favorites & Folders**: this list determines which SharePoint locations are Favorites or Folders and/or Offline locations
- 3. **Control Group**: this list determines which users cannot add, modify, or delete favorite/folder locations
- 4. Applications: this list determines which Colligo applications the Administrator site is applied to
- 5. **Configuration**: this list determines which settings apply to the targeted Colligo application
- 6. Launchpad Control Group: this list determines which users cannot add, modify, or delete the Launchpad settings, as set in the Launchpad Groups, Buttons, and Items lists.
- 7. Launchpad Groups: this list sets the names of the Launchpad Groups for specified users.
- 8. **Launchpad Buttons**: this list sets the names of the Launchpad Buttons that are attached to specified Groups.
- 9. Launchpad Items: this list sets the names of the Launchpad Itemsthat are attached to specified Buttons.

Colligo provides an Administrator Site template (**Colligo Administration Site 1.3 wsp**) that sets up all lists. If you choose to manually set up your own lists, please see **Appendix I**.

To import the site template:

1. In Site Settings, under the Web Designer Galleries group, select Solutions.

		Tessa MacKinnon 👻 🔅	?
		😯 SHARE 📩 FOLLOW	[1]
s >	QA WebApps Bernard's Site  FDIT LINKS Site Settings		
Home Documents Site Contents	Users and Permissions People and groups Site permissions Site app permissions Web Designer Galleries Site columns Site content types Web parts List templates Master pages Solutions Themes Composed looks	Look and Feel Title, description, and logo Quick launch Top link bar Tree view Change the look Site Actions Manage site features Save site as template Enable search configuration export Reset to site definition Delete this site	E
	Site Administration Regional settings Site libraries and lists User alerts RSS Sites and workspaces Workflow settings Site Closure and Deletion Term store management Popularity Trends	Search Result Sources Result Types Query Rules Schema Search Settings Search and offline availability Configuration Import Configuration Export	
•			+

The Solution Gallery displays.

2. On the **Solutions** ribbon, click **Upload Solution**:

	Tessa MacKinnon 🗸 🔅	?
BROWSE SOLUTIONS LIBRARY	😯 SHARE 🛛 🏠 FOLLOW	
Upload Solution     Solution     Solution     Solution		
New Commands		
Home     Your resource quota is 300 server resources. Solutions can consume resources and may be tempor usage exceeds your quota.       Documents     Site Contents       Current Usage (Today)	rarily disabled if your resource	=
Name Edit Modified Status Resource There are no items in this view of the Solution Gallery. To add a solution, click "Upload".	re Usage	-

The Add a document window displays:

							Tessa MacKinnon 👻 🔅	?
BROWSE SOL		RY					😯 SHARE 🛛 🟠 FOLLOW	
Upload Solution New Home Documents Site Contents X EDIT LINKS	Activate Deactivat Commands	Add a document Choose a file	Edit	♥ Overwrite existing files Modified the Solution Gallery. To add a	OK Status a solution, click "Up	Browse Cancel Resource Usag pload".	isabled if your resource	
								-

- 3. Click **Browse** and browse to the location of the .wsp file.
- 4. Click **OK**.

The .wsp file displays in the Solutions list.

- 5. Click the checkbox beside the file name.
- 6. Click Activate:

											Tessa MacK	innon 🚽 🛛 🖏	: ?
BROW	SE SOLU	TIONS	LIBRA	RY							🗘 Share	숫 FOLLOW	
Upload Solution	Delete Ac			Upgrad	e								
New		Comn	nands										
Site C	e ments Contents DIT LINKS					resource quota is 300 server resource e exceeds your quota. Current Usage (Today) Average Usage (Last 14 days)	[	ons can cons	ume resources and may	be temporarily	disabled if yo	our resource	
					N	Name		Edit	Modified	Status	Resour	rce Usage	
					] (	Colligo Administrator Site 🛚 🕬		D	3/21/2013 10:37 AM				

The Solution Gallery – Activate Solution window displays:

	Solution Gallery - Activate Solution	×	MacKinnon 👻 🏟	?
BROWSE SOLUTIONS			SHARE 🟠 FOLLOW	[□]
Upload Delete Activate De	VIEW			
Solution New Comma	Edit     Delete Item		_	
Home	Manage Commands	_	ed if your resource	
Documents	Warning: You should only activate this solution if you trust this solution. An activated solution can read, modify and delete your data.	Î		
Site Contents	Name			
🖋 EDIT LINKS	Solution Id 224f33a8-a560-40f1-adf8-d19ffe9eab1b	=		
	Title		Resource Usage	
	Description			
	Created at by Last modified at by	+		

7. Click Activate and Close.

Once the template is activated, you can create a site based on it.

- 8. To create the site, go to **Site Settings**, under the **Site Administration** group, select **Sites and workspaces.**
- 9. On the Sites and Workspaces page, click Create:

		Tessa MacKinnon 🗸	₿?
		🗘 SHARE 🟠 FOL	LOW [□]
s>	QA WebApps Bernard's Site   EDIT LINKS  Site Settings   Sites and Workspaces	0	
	Create Site Creation Permissions Sites Description Bernard's Site	Last Modified Delete 8 days ago 🗙	E
	Document Workspaces There are no Document Workspaces. To create one, click Create above.		
	Meeting Workspaces There are no Meeting Workspaces. To create one, click Create above.		_
•	m		

The Site Contents > New SharePoint Site displays:

			Tessa MacKinnon 🗸 🛛 🔯	?
			😯 SHARE 🔗 FOLLOW	[0]
S	QA WebApps Bernard's Site	<ul> <li>✓ EDIT LINKS</li> <li>SharePoint Site</li> </ul>		
Home Documents Site Contents I EDIT LINKS	Title and Description	Title: Description:		
	Web Site Address	URL name: http://vs-dev-sp15:13337/		
	Template Selection	Select a template: Collaboration Enterprise Custom Team Site Blog Project Site Community Site	Ī	
		A place to work together with a group of people.		
	Permissions You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users. Note: If you select <b>Use same</b> <b>permissions as parent site</b> , one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.	User Permissions:		
	Navigation	Display this site on the Quick Launch of the parent site?		
		<ul> <li>Yes</li> <li>No</li> <li>Display this site on the top link bar of the parent site?</li> <li>Yes</li> <li>No</li> </ul>		
	Navigation Inheritance	Use the top link bar from the parent site? Ves  Create Cancel Cancel		

- 10. Enter the following information:
  - a. Title and Description: enter a title and description for your site
  - b. **Web Site Address**: choose the URL path from the drop-down menu, and enter the name of your site in the **URL** field
  - c. Template Selection: click the Custom tab and choose Colligo Administrator Site

- d. **Permissions:** choose if you want to use the same permissions as the parent site, or create unique permissions for the site
- e. **Navigation:** Choose if you want to display a link to this site on the Quick Launch of the parent site, and if you want to display a link to this site in the top link bar of the parent site
- f. **Navigation Inheritance:** Choose if you want to use the top link bar from the parent site

#### 11. Click Create.

The **Home** tab of your Administration site displays. You can now begin to configure the Sites, Favorites and Folders, Control Groups, Applications, and Configuration settings for your users.

# **Colligo Sites List**

The **Colligo Sites** list contains all the sites you are administering, and the users who have access to these sites. Users who you assign site access to within the site list can automatically see the site in their Colligo SharePoint Sites list on their clients.

**NOTE**: if you add a site that you are pushing to Briefcase for Windows, you must also add a folder from the site in the **Colligo Contents** section. The folder must be at the list or library level. If you do not add a folder, the site is not pushed.

# Adding a Site

To add a new site:

1. In the Colligo Sites list, click Add new item.

The **New Item** dialog displays:

Colligo Sites - New Item	1		□ ×
Edit			
Save Cancel Paste			
Commit Clipboard	Spelling		
Title *			
Site Description			*
Site URL *			
Applicability	Enter users separated wi	th semicolons.	8./ M
Site Options	Add Email Manager Fo	older	
Push to Application	Briefcase for Android Briefcase for iOS Briefcase for Mac Briefcase for Windows Email Manager	Add > <	
Allow Sync to Application	Briefcase for Android Briefcase for iOS Briefcase for Mac Briefcase for Windows Email Manager	Add > <	
		Save	Cancel

- 2. Enter the following information:
  - a. Title: enter the title of the site

**NOTE**: this field is for display purposes only

- b. **Site Description**: enter a description of the site purpose or content *NOTE*: this field is for display purposes only
- c. Site URL: enter the URL address of the site
   NOTE: there are a number of merge fields that you can add to this field if you want the
   URL to be personalized for your users:
  - [Username] eg. *dmackay*
  - [QualifiedUsername] eg. corporate dmackay
  - [EnvironmentMYVAR] value of environment variable MYVAR
  - [RegistryMYREGVAL] value of registry setting string from HKCU/Software/Colligo/EmailManager/SystemConstants/MYREGVAL
- Applicability: add the groups or users who you want to have configured for the site; if you leave this blank, all users have the site added in the client.
   NOTE: Active Directory groups are not supported in this field.
- e. **Site Options**: check the [**Add Email Manager Folder**] box to make the SharePoint site a Folder.

NOTE: this option is not supported if Email Manager is installed in Offline mode.

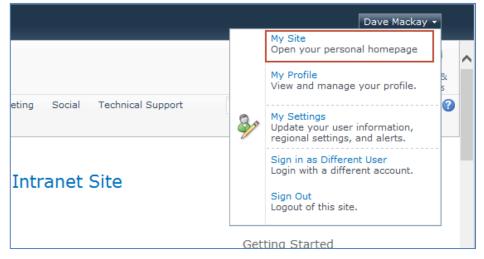
- f. **Push to Application**: in the left column, select the application you want to push the site to and click **Add**; to remove an application, select it in the right column and click **Remove**.
- g. Allow Sync to Application: in the left column, select the application that will have offline access to the site and click Add; to remove an application, select it in the right column and click Remove.
- 3. Click **Save** to add the site to the list.

### Adding a My Site

To push your users' My Sites without entering them each individually, you can use a variable to map to the configuration of your My Site URLs.

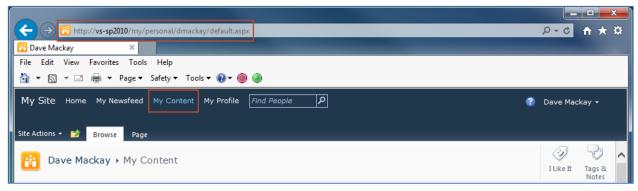
To determine the format of your My Site URL:

1. From a SharePoint location, click on your My Site location:



2. In the My Site home page, click **My Content**.

The browser address bar displays your My Site URL:



In this example, the My Site URL is: <u>http://vs-sp2010/my/personal/dmackay</u>.

**NOTE**: remove any characters after the username. Eg. "/default.aspx"

3. Add the following generic site entry to the Colligo Sites list: http://vs-sp2010/my/personal/[Username]

When the site is pushed to each user, the username variable maps to each individual user name on each machine, so the site is then specific to that user.

Other possible variables include:

- [QualifiedUsername] eg. corporate\_dmackay
- [EnvironmentMYVAR] value of environment variable *MYVAR*
- [RegistryMYREGVAL] value of registry setting string from *HKCU/Software/Colligo/EmailManager/SystemConstants/MYREGVAL*

The decision to use <u>http://vs-sp2010/my/personal/[Username]</u> or <u>http://vs-sp2010/my/personal/[QualifiedUsername]</u> will be based on how My Sites were configured in your company. Ask your SharePoint administrator if unsure.

# **Colligo Content**

The **Favorites & Folders** list allows you to specify a SharePoint location as a Favorite or Folder and/or as an Offline location within the Colligo client for a group of users or an individual user.

**NOTE**: when adding a Briefcase for Windows location, it must be at the list or library level. If you add a subfolder of a list or library, the folder will not display.

### Adding a Favorite or Folder Location

To add a new Favorite or Folder location:

1. In the **Colligo Content** list, click **Add new item**. The **New Item** dialog displays:

Colligo Cont	ent - New Item		⊐ ×
Edit			
Save Cancel	Paste	ABC Spelling	
Commit	Clipboard	Spelling	
Title *			
Favorite Descr	ription		A 7
Favorite Site F	leference *	http://portal.colligo.com	
Favorite Relati	ve Path		
Applicability		Enter users separated with semicolons.	8 <sub>1</sub> / 🔛
Folder Options	*	<ul> <li>Email Manager Favorite</li> <li>Email Manager Folder</li> <li>Email Manager Favorite (Offline)</li> <li>Email Manager Folder (Offline)</li> <li>Briefcase for Windows (Offline)</li> <li>Briefcase for iOS (Offline)</li> <li>Briefcase for Mac (Offline)</li> <li>Briefcase for Android (Offline)</li> </ul>	
		Save C	ancel

- 2. Enter the following information:
  - a. **Title**: enter the name of the favorite/folder *NOTE*: this name is for display purposes only
  - b. **Favorite Description**: enter a description of the favorite/folder location *NOTE*: this description is for display purposes only
  - c. **Favorite Site Reference**: select the URL of the site that contains the favorite/folder location from the drop-down menu
    - **NOTE**: (If the URL of the site is not in this list you will need to add the Site to the Sites List).
  - d. Favorite Relative Path: enter the Document Library name from the site address; for example if the site was <u>http://MyServer/MySite/MyLibrary</u>, the relative path is MyLibrary.
     NOTE: there are a number of merge fields that you can add to this field if you want the URL to be personalized for your users. *These fields are case sensitive*.

- [Username] eg. dmackay
- [QualifiedUsername] eg. corporate\_dmackay
- [EnvironmentMYVAR] value of environment variable MYVAR
- [RegistryMYREGVAL] value of registry setting string from HKCU/Software/Colligo/EmailManager/SystemConstants/MYREGVAL
- e. **Applicability**: add the groups or users who you want to have configured for the site; if you leave this blank, all users have the locations added in the client. **NOTE**: Active Directory groups are not supported in this field.
- f. Folder Options: choose from one of the following options:
  - i. **Email Manager Favorite**: select this option to add the location as a Favorite in Colligo Email Manager in your Outlook tree. Choosing this option means the content of the folder is only available when users are connected to their SharePoint network. Favorites display as a single location in the folder tree and users cannot navigate to any subfolders in the folder tree.
  - ii. **Email Manager Folder**: select this option to add the location as a Folder in Colligo Email Manager in your Outlook tree. Choosing this option means the content of the folder is only available when users are connected to their SharePoint network. Users can navigate to subfolders of Folder locations in the folder tree.
  - iii. Email Manager Favorite (Offline): select this option to add the location as an offline Favorite in Colligo Email Manager in your Outlook tree. Choosing this option means that the content of the folder is downloaded to a user's local machine and is available to users when they are offline. Favorites display as a single location in the folder tree and users cannot navigate to any subfolders in the folder tree.
  - iv. **Email Manager Folder (Offline):** select this option to add the location as an offline Folder in Colligo Email Manager in your Outlook tree. Choosing this option means that the content of the folder is downloaded to a user's local machine and is available to users when they are offline.
  - v. **Briefcase for Windows (Offline):** select this option to add the location as an offline folder in both Briefcase interfaces (stand-alone and Windows Explorer extension). Choosing this option means that the content of the folder is downloaded to a user's local machine and is available to users when they are offline.
  - vi. **Briefcase for iOS (Offline):** select this option to make this location offline in Briefcase for iOS. Choosing this option means that the content of the folder is available locally on a user's iOS device (iPad, iPhone, iPod).
  - vii. **Briefcase for Mac (Offline)**: select this option to make this location offline in Briefcase for Mac. Choosing this option means that the content of the folder is downloaded and available locally on a user's Mac.
  - viii. **Briefcase for Android (Offline):** select this option to make this location offline in Briefcase for Android. Choosing this option means that the content of the folder is downloaded and available locally on a user's Android device.
- 3. Click **Save** to add the Favorite or Folder to the list.

# **Colligo Control Group List**

The **Colligo Control Group** list determines which users or groups have restricted control to specific actions in both Colligo Briefcase iOS and Colligo Email Manager Connected mode.

In Colligo Email Manager Connected mode, users placed in a control group cannot add, modify, or delete favorite/folder locations.

In Colligo Briefcase iOS, users placed in a control group cannot add sites to the application.

# Adding a Colligo Control Group

To add users or groups to the control group:

- 1. In the **Colligo Control Group** SharePoint list, click **Add new item**.
  - The New Item dialog displays:

Colligo Control Group - New Item 🛛 🗖 🗙										
Edit		_	_		_		_			
Save Cancel	Paste	Attach File	ABC Spelling							
Commit	Clipboard	Actions	Spelling							
Title *										
Group or User	*						۵/ 🗓			
				Save		Cance	el 🛛			

- 2. Enter the following information:
  - a. **Title**: enter the title of the control group *NOTE*: this name is for display purposes only
  - b. **Group or User**: add the groups or users who are in the control group *NOTE*: Active Directory groups are not supported in this field.
- 3. Click **Save** to add the users or groups to the control group.

# **Colligo Applications List**

The Colligo Applications list feeds into the Colligo Sites list (see Colligo Sites List).

# **Adding an Application**

To add a new application:

- 1. In the **Colligo Applications** SharePoint list, click **Add new item**.
  - The New Item dialog displays:

Colligo Appl	Colligo Applications - New Item								
Edit									
Save Cancel	Paste	Attach File	ABC Spelling						
Commit	Clipboard	Actions	Spelling						
Title *									
			(	Save		Cancel			

- 2. In the Title field, enter one of the following Colligo Applications to add to the list:
  - a. **Email Manager**: add this application if you are using Email Manager 6.0 or Contributor Pro 6.0
  - b. Briefcase for iOS: add this application if you are using Briefcase for iOS
  - c. **Briefcase for Windows**: add this applications if you are using Briefcase for Windows 6.0 or Contributor Pro 6.0
  - d. Briefcase for Mac: add this applications if you are using Briefcase for Mac
  - e. Briefcase for Android: add this applications if you are using Briefcase for Android
- 3. Click **Save** to add the new application to the list.

**NOTE**: you can remove applications from this list if you don't want them to be displayed when configuring the other lists.

# **Colligo Configuration List**

The Colligo Configuration list is a list of settings that are accessed by Colligo Briefcase for iOS and Colligo Email Manager.

# Adding a Configuration

To add a new configuration item:

1. In the **Colligo Configuration** SharePoint list, click **Add new item**. The **New Item** dialog displays:

Colligo Configuration - New Item							
Edit							
Save Cancel	Paste	ABC Spelling					
Commit	Clipboard	Spelling					
Title *							
Applicability		Enter users separated with semicolons.	8 <sub>~</sub> 🗓				
Application		(None)					
Configuration	Site Reference	(None)					
Value							
		Save Can	cel				

- 2. Enter the following information:
  - a. Title: enter the title of the configuration setting (see table)
  - Applicability: add the groups or users who you want to have access to the setting; if you leave this blank, all users have access to the setting
     NOTE: Active Directory groups are not supported in this field.
  - c. **Application**: from the drop-down menu, choose the Colligo application that the setting will reference; if you leave this blank, the setting may apply to all Colligo applications
  - d. **Configuration Site Reference**: from the drop-down list, choose the site that the setting applies to. Only the settings **Default Sync Limit** and **Default Sync Interval** can be set for individual sites.
  - e. Value: specify the value of the setting

The following setting is configurable in Colligo Email Manager:

Configuration Title	Functionality	Possible Values
Launchpad Restore Defaults	This setting can be used to initiate a restore to the current Launchpad settings as defined in Administrator.	Optional: Use this field to differentiate
	User-created Groups are not changed. Each instance of this setting is handled by an Outlook client on start-up only once.	between multiple instances of this setting for clarity.

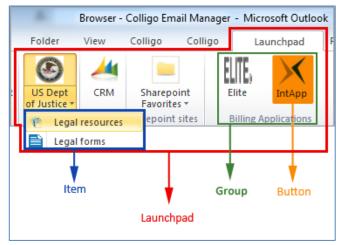
Configuration Title	Functionality	Possible Values
Passcode Enforced	Enforces use of the passcode lock in the app if value is True	True / False
Passcode Value	Forces the passcode lock to be a specified value	Any 4-digit string
Passcode Lockout Time	Sets the passcode lockout timer to a specified value	0, 1, 2, 5, 10, 30, 60 mins
Passcode Data Erase	Enforces the feature for erasing data on 10 failed attempts when value is True	True / False
OpenIn Disabled	The option to open an item in a program is disabled when value is True	True / False
Email As Attachment Disabled	The option to email an item as an attachment is disabled when value is True	True / False
Email As Link Disabled	The option to email an item as a link is disabled when value is True	True / False
Print Disabled	The option to print a document is disabled when value is True	True / False
Default Sync Interval	Sets the default sync interval for sites	-1(Every Open), 0 (Manual), 15, 30, 60, 1440 (Daily)
Default Sync Limit	Sets the default sync limit for sites (in Mb) <b>NOTE</b> : this setting is applied on a site-by-site basis; you cannot set the Global Storage Limit for the entire application.	0, 10, 20, 50, 100, 200, 500, 1000
Sync on 3G Default	Sets the <b>Sync on 3G</b> setting to ON when value is True	True / False
Openin Approved Apps	The option to restrict the list of apps that display in the Open in list; any app listed in the Value field is an approved app and will display.	bundleID (com.dataviz.xxxx)
One Way Sync	Sets the application in read-only mode when value is True	True / False

The following settings are configurable in Colligo Briefcase for iOS:

# **Email Manager Launchpad Lists**

There are four lists in Colligo Administrator that can be used to configure and manage the Launchpad ribbon feature in Colligo Email Manager:

- Launchpad Control Group
- Launchpad Groups
- Launchpad Buttons
- Launchpad Items



Unlike the other Administrator lists, all Launchpad list items are pushed to the Outlook client only once.

Additionally, the Colligo Administrator template includes an **Images** Library. You can upload images to this library and use these for the Icon fields in the Launchpad Buttons and Launchpad Items lists.

**NOTE**: you can choose to disable the push of Launchpad items if it interferes with your Outlook start-up time. For more information, see the following configuration setting: <a href="http://www.colligo.com/support/setting/prevent-collig...launchpad-push/">http://www.colligo.com/support/setting/prevent-collig...launchpad-push/</a>

# Launchpad Control Group List

The **Launchpad Control Group** list determines which users or groups cannot add, modify, or delete any of the content in the Launchpad ribbon. Any users or groups placed in the Launchpad control group cannot see the **Add/Remove/Edit/Import/Export** buttons in the Launchpad configuration dialog.

To add to the Launchpad control group:

1. In the **Colligo Control Group** SharePoint list, click **Add new item**. The **New Item** dialog displays:

Laun	Launchpad Control Group - New Item								□ ×	
Edit										
Save	Cancel	Paste	∦ Cut ⊫⊇ Copy	Attach File	ABC Spelling					
Con	nmit	Clip	board	Actions	Spelling					
Title *	F								 	
Group	o or User									🎝 🔟
					(		Save		Cancel	

- 2. Enter the following information:
  - a. **Title**: enter the title for the users or groups **NOTE**: this name is for SharePoint display purposes only
  - b. **Group or User**: add the groups or users who are in the control group *NOTE*: Active Directory groups are not supported in this field.
- 3. Click **Save** to add to the Launchpad control group.

### Launchpad Groups List

The Launchpad Groups list is a list of the groups that display in the Launchpad ribbon. You can configure the name of the group, who sees it, if it's modifiable, and which Buttons are attached to it.

To add a new Launchpad group:

1. In the Launchpad **Group** SharePoint list, click **Add new item**. The **New Item** dialog displays:

		0						
Launchpad (	Groups	- New I	tem					□ ×
Edit								
Save Cancel	Paste	∦ Cut ≧ Copy	Attach File	ABC Spelling	9			
Commit	Clipt	board	Actions	Spelling	)			
Title *								
Screen Tip								
Description							۸ ۳	
Applicability		Enter use	ers separ	ated with	n semicol	ons.	<b>%</b> / 🗊	
Modifiable								
Buttons		IT's Sup Microsof mysite ncix News We	t LCA			Add > < Remove		
						Save	Cancel	

- 2. Enter the following information:
  - a. Title: enter the title for the group
  - b. **Screen Tip**: enter a screen tip that displays when a user hovers the mouse over a group in Launchpad
  - c. **Description**: enter a description of the group that displays when a user hovers the mouse over a group in Launchpad
  - d. **Applicability**: add the groups or users who you want to have access to the setting; if you leave this blank, all users have access to the setting
  - e. **Modifiable**: check the box if you want the group to be modifiable by users; ie. If this box is checked, users can edit the group (and its buttons and items) in the Launchpad configuration dialog
  - f. **Buttons**: this list is populated by the items from the **Launchpad Buttons** list; to include a button in the group, select it in the left-hand column and click **Add** to move it to the right-hand column. To remove a button from the group, select it in the right-hand column and click **Remove**.
- 3. Click **Save** to add the new Launchpad group to the list.

### Launchpad Buttons List

The Launchpad Buttons list is a list of the buttons that can be added to groups in the Launchpad ribbon; items added to this list feed into the Launchpad Groups list. You can configure the name of the button, and which Items are included in it.

To add a new Launchpad Button:

1. In the Launchpad **Buttons** SharePoint list, click **Add new item**.

Launchpad E	Buttons - New	Item		□ ×
Edit				
Save Cancel	Paste	ABC Spelling		
Commit	Clipboard	Spelling		
Title *	[			
Website URL				
Screen Tip				
Description				~
Icon	http://	Web address: description:	(Click here to test)	
Items			Add >	
			Save	Cancel

- 2. Enter the following information:
  - a. **Title**: enter the title of the button
  - b. Website URL: enter the URL of the web page associated with the button
  - c. **Screen Tip**: enter a screen tip that displays when a user hovers the mouse over a button in Launchpad
  - d. **Description**: enter a description of the button that displays when a user hovers the mouse over a button in Launchpad
  - e. **Icon**: enter the URL for the location of the image file for the icon; this could be a location on the Internet or a location in the Images Library in Colligo Administrator. In the second field, enter a description for the icon.
  - f. **Items**: this list is populated by the items from the **Launchpad Items** list; to attach an item to a button, select it in the left-hand column and click **Add** to move it to the right-hand column. To remove an item from a button, select it in the right-hand column and click **Remove**.

### Launchpad Items List

The Launchpad Items list is a list of the items that can be attached to buttons in the Launchpad ribbon; items added to this list feed into the Launchpad Buttons list. You can configure the name of the item, and its associated icon.

To add a new Launchpad item:

1. In the Launchpad Items SharePoint list, click Add new item. The New Item dialog displays:

Launchpad	Items - New Ite	em					□ ×
Edit							
Save Cancel	Paste	Spelling					
Commit	Clipboard	Spelling					
Title *							
Website URL							
Screen Tip							
Description							*
							~
Icon		http://	Web address description:	(Click here t	to test)		
				Save		Cancel	

- 2. Enter the following information:
  - a. Title: enter the title of the item
  - b. Website URL: enter the URL of the web page associated with the item
  - c. **Screen Tip**: enter a screen tip that displays when a user hovers the mouse over an item in Launchpad
  - d. **Description**: enter a description of the item that displays when a user hovers the mouse over an item in Launchpad
  - e. **Icon**: enter the URL for the location of the image file for the icon: this could be a location on the Internet or a location in the Images Library in Colligo Administrator. In the second field, enter a description for the icon.

# Appendix I

If you want to set up your own lists instead of using the template, use the following column headings and properties for each list:

List name: Colligo Sites

- Title: (Single line text) [Required] [Not referenced by client applications]
- Site Description: (Multi-line text) [Not referenced by client applications]
- Site URL: (Single line text) [Required]
- Applicability: (Person or Group) [Multiple selections ok]
- Site Options: (MultiChoice Checkboxes)
  - Option: Add Email Manager Folder
- Push to Application: (Lookup Multiple) [Reference Application > Title]
- Allow Sync to Application: (Lookup Multiple) [Reference Application > Title]

#### List name: Colligo Content

- Title: (Single line text) [Required] [Not referenced by client applications]
- **Favorite Description**: (Multi-line text) [Not referenced by client applications]
- Favorite Site Reference: (Lookup Dropdown) [Reference Colligo Sites > Site URL]
- Favorite Relative Path: (Single line text) [Required]
- Applicability: (Person or Group) [Multiple selections ok]
- Folder Options: (Choice Radio buttons)
  - Email Manager Favorite
  - Email Manager Folder
  - Email Manager Favorite (Offline)
  - Email Manager Folder (Offline)
  - Briefcase for Windows (Offline)
  - Briefcase for iOS (Offline)
  - Briefcase for Mac (Offline)
  - Briefcase for Android (Offline)

### List name: Colligo Control Group

- Title: (Single line text) [Required] [Not referenced by client applications]
- Group or User: (Person or Group) [Single selection] [Required]

### List name: Colligo Applications

• Title: (Single line text) [Required]

### List name: Colligo Configuration

- **Title**: (Single line text) [Required]
- Applicability: (Person or Group) [Multiple selections ok]
- Application: (Lookup Dropdown) [Reference Application > Title]
- Configuration Site Reference: (Lookup-Dropdown) [Reference Site > Site URL]
- Value: (Single line text)

#### List name: Launchpad Control Group

- Title: (Single line text) [Required] [Not referenced by client applications]
- Group or User: (Person or Group) [Single selection] [Required]

#### List name: Launchpad Groups

• Title: (Single line text) [Required]

- Screen Tip: (Single line text)
- **Description**: (Multi-line text)
- Applicability: (Person or Group) [Multiple selections ok]
- Modifiable: "Yes/No"
- Buttons: (Lookup Multiple) [Reference Launchpad Buttons > Title]

#### List name: Launchpad Buttons

- **Title**: (Single line text)
- Applicability: (Person or Group) [Multiple selections ok]
- Website URL: (Single line text)
- Screen Tip: (Single line text)
- **Description**: (Multi-line text)
- Icon: (Picture)
- Items: (Lookup Multiple) [Reference Launchpad Items > Title]

#### List name: Launchpad Items

- Title: (Single line text)
- Website URL: (Single line text) [Required]
- Screen Tip: (Single line text)
- Description: (Multi-line text)
- Icon: (Picture)