

Colligo Briefcase for Windows 6.1

Administrator's Guide



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Introduction

This document provides guidance for your deployment of Colligo Briefcase.

User documentation is provided on the Colligo Briefcase support website:

<http://www.colligo.com/support/>

For any further technical details please contact Colligo Technical Support at support@colligo.com, or for sales related question please contact sales@colligo.com.

Target Audience

- IT Administrator
- Technical Evaluator
- Deployment Manager

Overview

Colligo Briefcase is an easy-to-deploy .NET client-only application; no server modifications are required. The installer package is just 5 MB in size. Installed, it consumes roughly 11 MB of disk space, not including content. Colligo Briefcase for SharePoint is IT-department friendly. It supports customized installations and can be deployed using your choice of deployment tools.

Colligo Briefcase supports SharePoint sites based on the 2010 and 2007 releases, and includes an add-in to integrate with Outlook 2010 and 2007.

Localization

Colligo Briefcase is available in English, French, German, Spanish (Castilian) and Spanish (Mexican) languages. Colligo Briefcase localizes to the base language of the running machine, defaulting to English.

System Requirements

Software Requirements

Colligo Briefcase requires the following software:

- Windows 8
- Windows 7
- Windows XP Professional
- Windows Vista

Client Software Requirements

Colligo Briefcase has the following client software requirements:

- Microsoft .NET framework 3.5 Runtime
 - <http://www.microsoft.com/en-us/download/details.aspx?id=25150>
- Microsoft .NET framework 4.0 Runtime
 - <http://www.microsoft.com/download/en/details.aspx?id=17718>
- Microsoft Office 2007, 2010, 2013
- Microsoft Office PIAs
 - Office 2010: <http://www.microsoft.com/download/en/details.aspx?id=3508>
 - Office 2007: <http://www.microsoft.com/download/en/details.aspx?id=18346>
- Microsoft Visual C++ 2010 Redistributable Package
 - 32-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=5555>
 - 64-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=14632>
- Windows Identity Foundation: <http://www.microsoft.com/en-ca/download/details.aspx?id=17331>
NOTE: Windows Identity Foundation (WIF) is not supported in Windows XP, so it is not necessary to install it if you are using XP. For Windows Vista/ 7/8, WIF is required to handle Colligo Administrator authentication through AD FS 2.0.

Server Software Requirements

Colligo Briefcase requires at least one of the following:

- Microsoft SharePoint Server 2010, MOSS 2007
- SharePoint Foundation Microsoft Windows SharePoint Services (WSS) 3.0, or 2.0
- SharePoint 2010 Online (Office365)
- SharePoint 2013

Installing Colligo Briefcase

Colligo provides both an .exe installer and an .msi installer for Colligo Briefcase.

There are different installer packages dependent on which Operating System you have:

- For a 32-bit Operating System, use the x86 installer
- For a 64-bit Operating System, use the x64 installer

.exe Installer

This installer package is an executable file with the following key features:

- Supports interactive install only (does not support silent install)
- Automatically installs software prerequisites (downloaded from www.colligo.com)
- Not customizable

Interactive .exe Install

NOTE: Microsoft Outlook must be closed for the installation to be successful.

1. Double-click the installation file.
2. Prerequisites are downloaded and installed.
3. Enter your license key.

Colligo Briefcase can be set to launch at Windows Start Up. This enables the background synchronization to start automatically.

MSI Installer

The MSI installer package has the following key features:

- Supports silent and interactive installs
- Does not install prerequisites - these must be downloaded and pre-installed
- Customizable

Interactive MSI Install

NOTE: Microsoft Outlook must be closed for the installation to be successful.

1. Ensure prerequisites are installed.
2. Double-click the installation file.
3. Enter your license key.

Silent Install or Uninstall

You can use the msiexec utility to install or uninstall silently.

To perform a silent install, use the following command line:

```
msiexec /i <Installer.msi> /qn
```

For example:

```
msiexec /i ColligoBriefcase.msi /qn
```

To perform a silent uninstall, use the following command line:

```
msiexec /x <Installer.msi> /qn
```

You can install a customized version of Colligo Briefcase using the msi installer. When using a batch file to install a customized msi package, it is important to ensure the prerequisites are installed before attempting to install Colligo Briefcase. An example batch file is listed below:

```
msiexec /i \\server\BriefcaseInstall\PreReq\O2007PIA.MSI /qn
\\server\BriefcaseInstall\PreReq\vstor.exe /q
msiexec /i \\server\BriefcaseInstall\CustomColligoBriefcase.msi /qn
```

Configuration Options

Colligo Briefcase saves settings in the registry. Many settings can be configured post-install by pushing out settings to the registry. Colligo Briefcase offers administrators the ability to configure a number of settings at install or post-install time. A detailed list of settings is maintained on the Colligo website at <http://www.colligo.com/support/colligo-briefcase-for-windows/configuration-settings/>

Editing the MSI

To edit the MSI installer package you need an MSI database editor. Colligo recommends the Orca database editor. Orca is a Microsoft utility for modifying and validating Windows Installer packages. It is intended to allow setup authors and administrators to manipulate databases compatible with the Windows Installer Service. This utility is a part of the Windows Installer SDK download, along with other MSI related tools.

An introduction to Orca can be found on the Microsoft site:
<http://support.microsoft.com/kb/255905/EN-US/>

Installing the Orca MSI editor

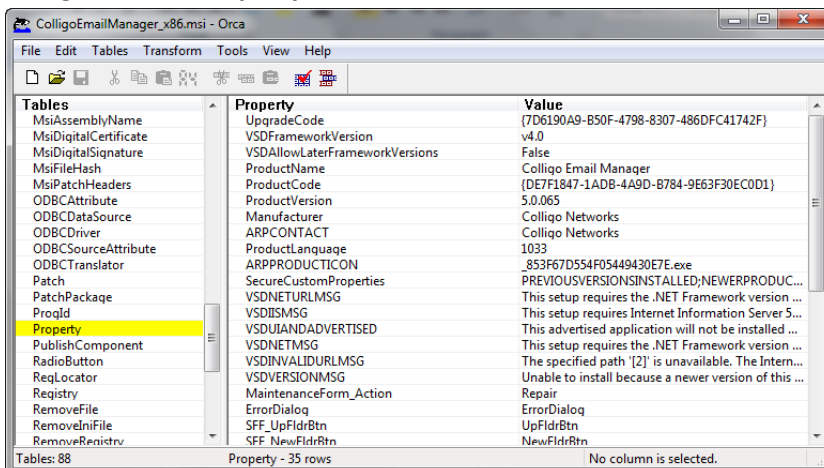
Instead of downloading the entire Windows Installer SDK, you can download Orca from Colligo's web site: <https://community.colligo.com/entries/23392635-How-can-I-use-Orca-MSI-editor-to-configure-a-Colligo-installer>

Using Orca to Edit the MSI

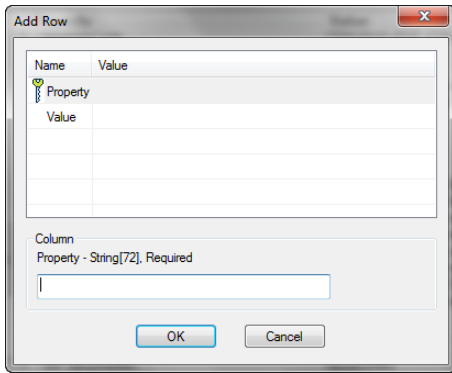
Once you have installed Orca, you can start editing the Colligo Briefcase.msi file. Colligo recommends copying the MSI file and working on the copy (since **Save As** in Orca does not save the entire MSI package).

Editing an MSI file:

1. Open the MSI file in Orca.
2. Navigate to the **Property** table in the **Tables** list.



3. From the **Tables** menu, select **Add Row**.
The **Add Row** dialog displays:



4. Enter the **Property** name and **Value**.
 5. Click **OK**.
- The new property displays in the **Property Table**.

NOTE: The property names are case sensitive.

NOTE: When editing an MSI database using Orca, there are extra steps required if you perform a **Save As....** As a best practice, it is advisable to edit an MSI database and **Save** the file being edited.

Editing the Registry

Registry settings may be stored under HKEY_LOCAL_MACHINE or HKEY_CURRENT_USER. Values are stored in:

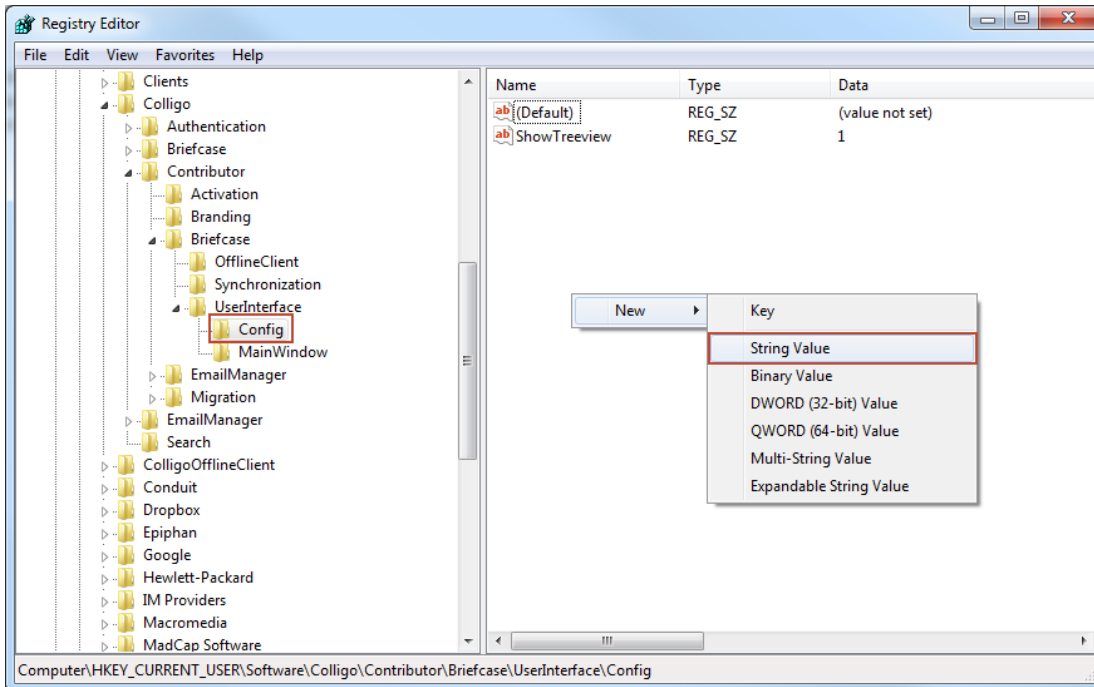
- HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\Colligo\Contributor\
- HKEY_CURRENT_USER\Software\Colligo\Contributor\

Registry keys must be in the form of Key/String Value. To add a string value to a registry key:

1. Open the Registry Editor.
2. Navigate to the Key you want to add a new String Value to. For example, if the key is **Colligo\Contributor\Briefcase\UserInterface\Config**, Config is the key and **EnableMetadataPrompt** is the string value within the **Config** Key.

NOTE: If the key doesn't exist, you can create it by right clicking on the parent key and select **New Key** from the contextual menu.

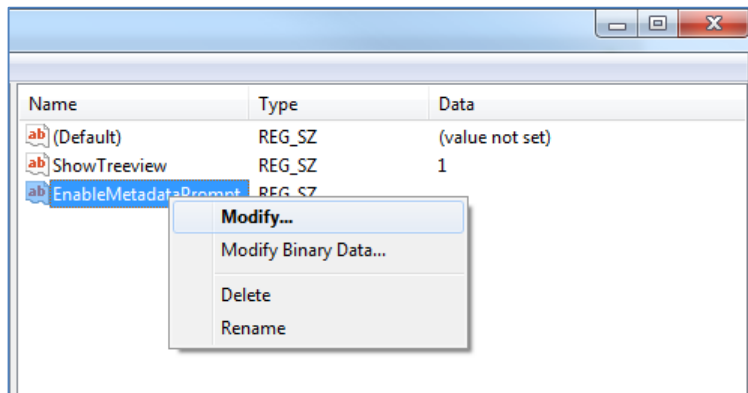
3. Right-click on the right side and select **New > String Value** from the contextual menu:



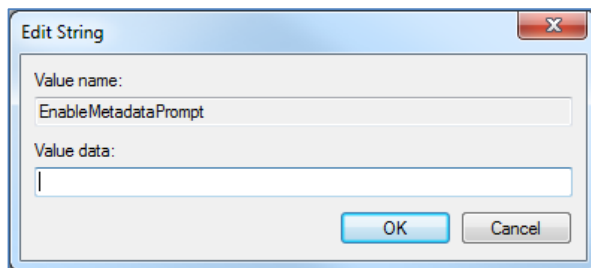
A new String Value appears in the **Name** list.

4. Enter the name of the String Value.

To edit the name of the String Value, right click it and select **Rename** from the contextual menu:



5. Press **Enter** or right-click and select **Modify** from the contextual menu to display the **Edit String** dialog:



6. Enter the **Value data** and click **OK**.

Communications

Colligo Briefcase communicates with SharePoint through the web services, the details of which are available on MSDN at: <http://msdn2.microsoft.com/en-us/library/aa979690.aspx>.

These web services calls are transmitted over HTTP (or HTTPS) using TCP. Colligo Briefcase also uses FrontPage RPC methods to communicate with the SharePoint server. FrontPage RPCs are also transmitted over HTTP(S) and TCP.

Details of the FrontPage RPC protocols are available on MSDN at: <http://msdn2.microsoft.com/en-us/library/ms954084.aspx>.

The services described above are installed and enabled on SharePoint by default. Because they are layered on top of TCP/HTTP, communication works over most WAN/VPN and/or wireless connections, as well as a standard LAN.

Web Proxy Configuration

Colligo Briefcase can be configured to use a web proxy. Proxy options are either:

- Direct connection (No Proxy)
- IE's default proxy
- Other proxy

For more information about configuring this setting, <http://www.colligo.com/support/setting/web-proxy-type/>

The other proxy is defined in the CFS.exe.config file according to the specifications listed on msdn here: [http://msdn2.microsoft.com/en-us/library/kd3cf2ex\(vs.80\).aspx](http://msdn2.microsoft.com/en-us/library/kd3cf2ex(vs.80).aspx)

SharePoint Security and Privileges

By using SharePoint's web services to access SharePoint data, Colligo Briefcase respects all privileges defined on the site. A user needs at least read access to an item in order to cache it. Colligo Briefcase supports most standard sign-on processes supported by SharePoint, including support for default credentials and other specified credentials. Passwords are stored in a secure manner using the Windows Cryptographic API.

The following standard Windows IIS authentication types are supported:

- Basic
- Digest
- Kerberos (Integrated Windows)
- NTLM (Integrated Windows)

ASP.NET forms-based authentication based on Active Directory Federation Services (AD FS 2.0) or similar identity management systems are also supported.

SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for taking sites offline. Client certificates and single-sign-on (SSO) authentication methods are currently not supported.

Cache location and Encryption

Colligo Briefcase caches SharePoint content on the local machine. The default cache location is in the users local profile area located at the following location in Windows XP:

%UserProfile%\Local Settings\Application Data\ColligoOfflineClient\Storage5

You can change the location to any other valid path including: the local file-store; network location; or other (for example, USB drive). For performance and connectivity reasons the local file-system is the preferred location for the cache.

Colligo Briefcase can be configured to secure data using the Windows Encrypting File System (EFS); a good introduction to Windows EFS can be found on Wikipedia: http://en.wikipedia.org/wiki/Encrypting_File_System. EFS can be configured to be compliant with the Federal Information Processing Standard (FIPS 140-1 and FIPS 140-2).

Microsoft TechNet published an evaluation of EFS for FIPS compliance here: <http://www.microsoft.com/technet/archive/security/topics/issues/fipseval.mspx>.

Server-side events

SharePoint may have server-side event-handlers defined. Typically event handlers may be added to the ItemAdding or ItemAdded events. These events are triggered when Colligo Briefcase performs content operations. The event-handlers may operate synchronously or asynchronously (typically ItemAdding would be synchronous, ItemAdded would be asynchronous). Event handlers that perform asynchronously and change the content must be sure to increment the internal item version to ensure Colligo Briefcase is notified of the content updates.

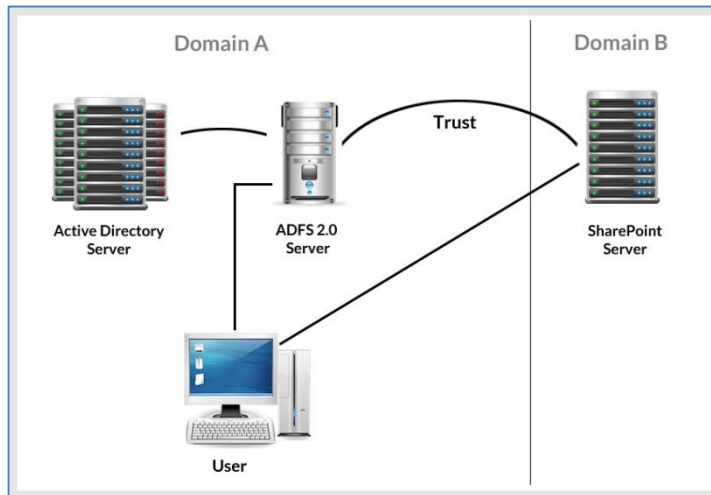
Workflow

Workflows are typically started or progressed by content changes. For example the **Get Approval** workflow starts when a document is changed and requires approval. Colligo Briefcase works with workflow such that content changes will initialize workflows on the server. There is no support for local workflows on the client.

Support for AD FS 2.0

Colligo Briefcase supports AD FS 2.0 (Active Directory Federation Service) authentication.

The infrastructure of the client machine, SharePoint Server, and AD FS 2.0 Server is illustrated below:



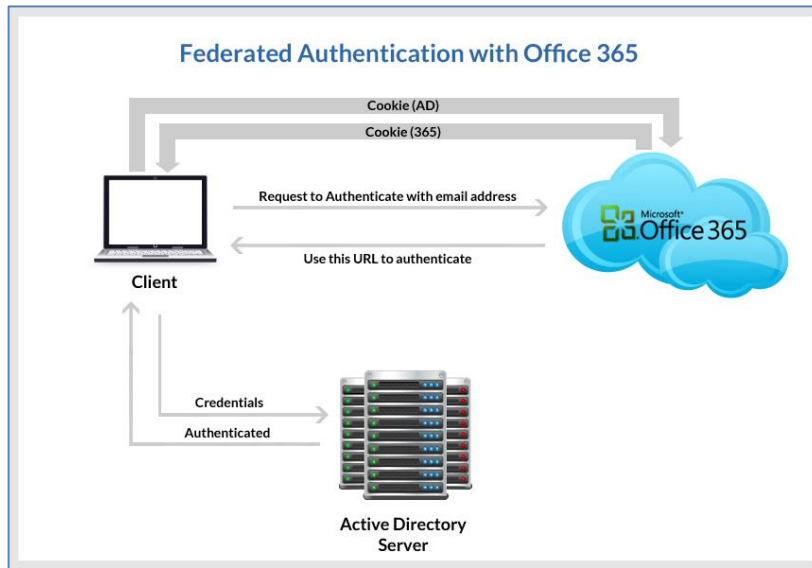
The workflow of the above infrastructure is as follows:

1. The user on client machine attempts to contact the SharePoint Server.
2. The SharePoint server denies the attempt, sending a message back to the client machine.
3. The client machine then attempts to connect to the AD FS 2.0 Server, which verifies the user's identity, and sends a token back to the client machine.
4. The token is then sent to the SharePoint Server, which has an inherent trust connection established with the AD FS 2.0 Server (configured during set up).
5. The connection to the SharePoint Server is successful.

Federation with Office 365 Sites

Colligo Briefcase supports federated authentication to Office 365 through AD FS 2.0.

The following diagram illustrates how Colligo Briefcase federates with Office 365 sites:



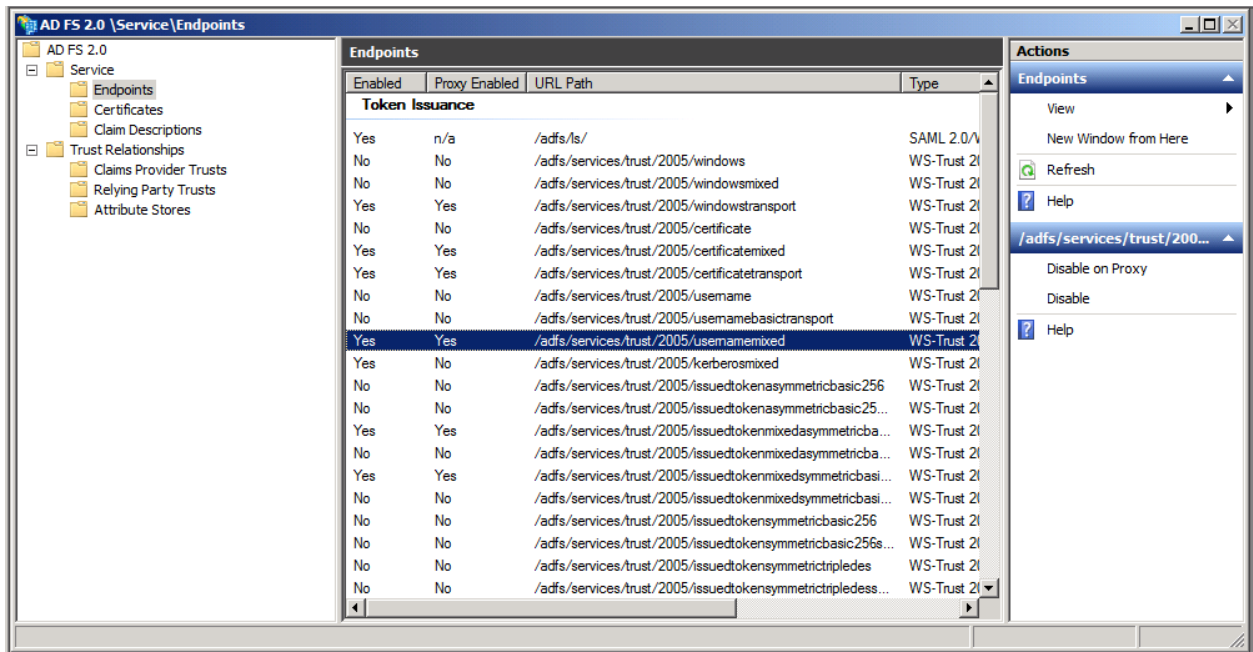
The workflow of the above infrastructure is as follows:

1. User sends request to Office 365 site using an email address.
2. Depending on the email address used to log in, it either manages the login on Office 365 (Managed Credentials) or re-direct back to the user with a URL (federated).
3. Colligo Briefcase authenticates the redirected URL, which points to an Active Directory server.
4. Active Directory returns a token to the user.
5. The user re-submits the token as the authentication to the Office365 site.
6. The token is accepted by Office 365 and the user receives a secondary token for future communication with Office365.

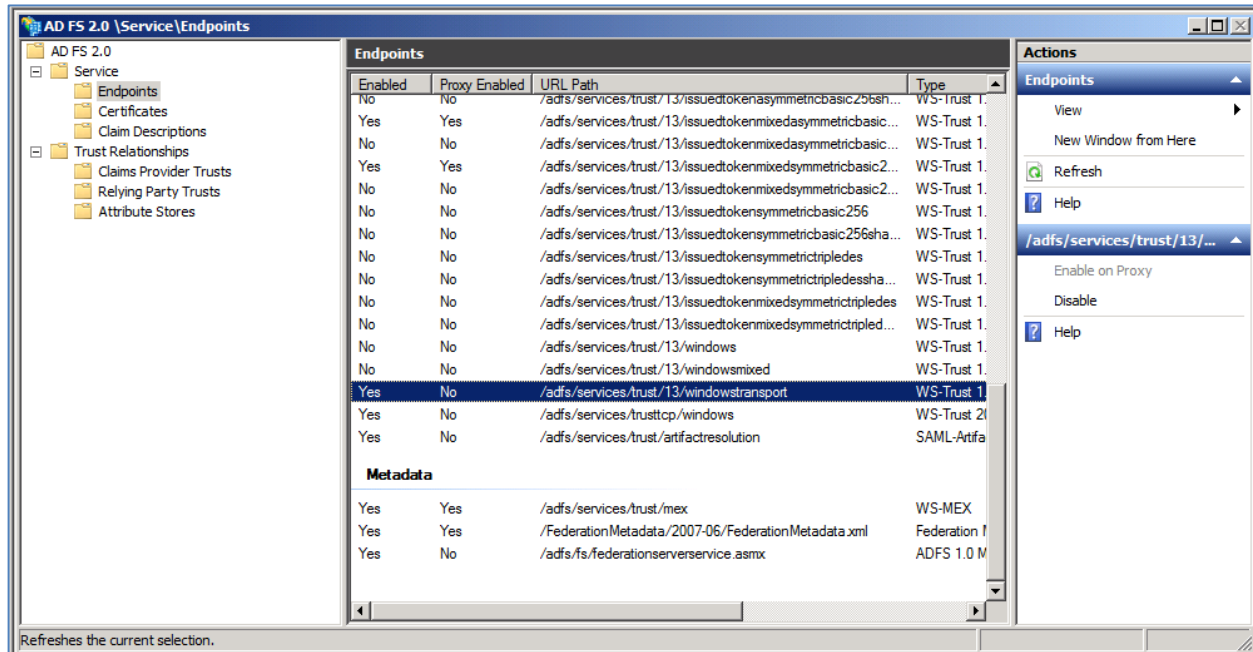
Enabling Authentication Service Endpoint

To configure AD FS 2.0, you need to enable an authentication service endpoint:

<https://<server>/adfs/services/trust/2005/usernamemixed>



<https://<server>/adfs/services/trust/13/windowstransport> (for default credentials)



After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

Key	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	<ADFS display name – for display purposes only>
Value Data	<AD FS 2.0 Server name: e.g. https://adfs.mycompany.com > <ADFS realm for SharePoint server e.g. urn:sharepointsvradfs:sharepoint>
Value Type	String

Configuring SharePoint for Email Metadata

Colligo provides a sample list template file that can be used to create a sample testing document library. Download the template from the Colligo support site, install it to the List template gallery, and use it to create a new document library in your site.

Downloading the List Template

You can download the list template from the following location:

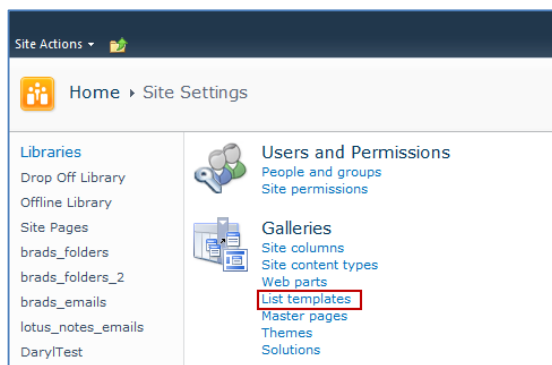
<https://community.colligo.com/entries/23216964-How-do-I-set-default-column-names-for-email-metadata-mapping->

Download the attachment *CfsEmailLibrary2010.zip*.

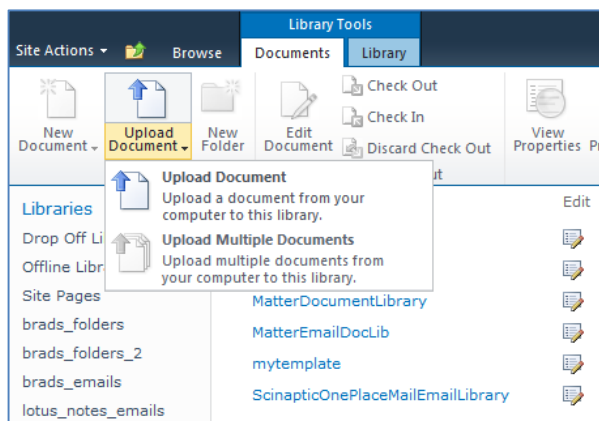
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

Installing the Sample List Template

1. Extract the list templates to the preferred location.
2. Navigate to the site collection you want to add the list template to.
3. In your SharePoint site, navigate to **Site Actions** -> **Site Settings**.
4. On the **Site Settings** screen, in the **Galleries** section, select **List Templates**:

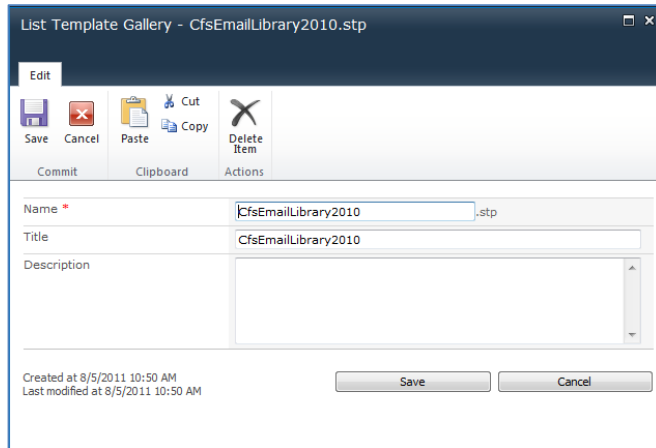


5. In the List Template Gallery, in the **Library Tools** > **Documents** ribbon, click **Upload Document**:



The **Upload Document** dialog displays.

6. Browse to the list template file (*CfsEmailLibrary2010.stp*) and click **OK**.
The **List Template Gallery** dialog displays:

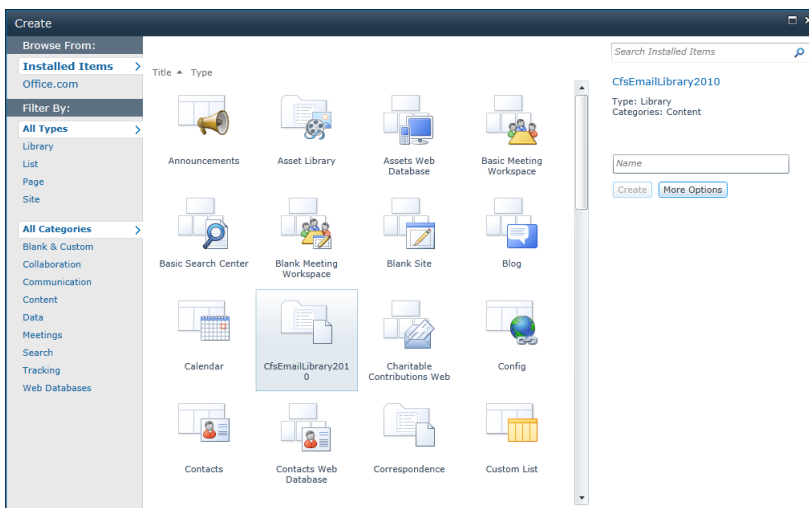


7. Enter the following information:
 - a. **Name:** enter a name for the template gallery
 - b. **Title:** enter a title that reflects the use of the template gallery
 - c. **Description:** enter a description for the template gallery
 8. Click **Save**.
- The new list template displays in the **List Template Gallery**.

Creating a Site

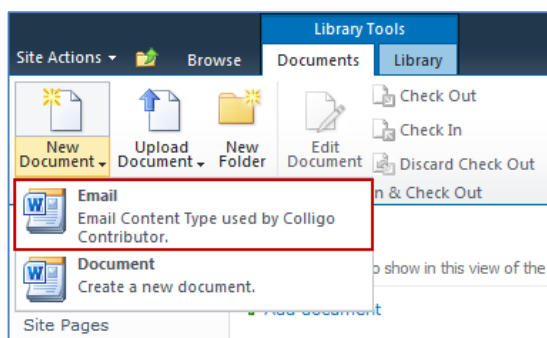
After you have installed the list template, you can create a new library based on the template.

1. Navigate to the site collection you want to add the list template to.
 2. Select **Site Actions > More Options**.
- The **Create** dialog displays.



3. Select the name of the list template you added.

NOTE: the name of the list template displays with the title you entered in step 7.b of Installing the Sample List Template.
4. In the right pane, enter a name for the library, and click **Create**.
5. Under the **Library Tools > Documents** ribbon, click the **New Document** drop-down arrow. The new Document Library displays as an option:



Manually Creating Content Types

Colligo Briefcase fully supports Content Types, and when working with Email documents Colligo recommends you create a content type for your email documents.

Enabling Metadata Extraction

To enable metadata extraction to a document library, you need to create a document library with columns that are defined to have metadata extracted into them. Columns can be created either directly, or by adding an existing content type to the library.

Colligo Briefcase extracts the following metadata properties from emails:

Email Metadata	Default Column Name	Type
Attachment	Attachment	Yes/No
Bcc	Bcc	Text
Bcc-Address	Bcc-Address	Text
Bcc-Type	Bcc-Type	Text
Categories	Categories	Text
Cc	Cc	Text
Cc-Address	Cc-Address	Text
Cc-Type	Cc-Type	Text
Conversation	Conversation	Text
From	From	Text
From-Address	From-Address	Text
From-Type	From-Type	Text
Importance	Importance	Number
Received	Received	Date/Time
Received-UTC	Received-UTC	Date/Time
Sensitivity	Sensitivity	Number
Sent	Sent	Date/Time
Sent-UTC	Sent-UTC	Date/Time
Subject	Subject	Text
To	To	Text
To-Address	To-Address	Text
To-Type	To-Type	Text

NOTE: Text fields can be Single Line of Text, or, Multiple Line of Text.

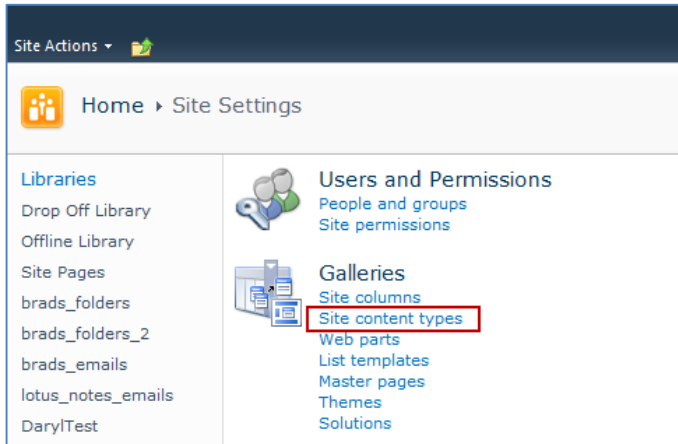
The **Default Column Name** refers to the display name of the SharePoint column

Metadata can be extracted into alternatively named columns. To extract metadata into non-default column names, see **Changing Column Mappings**.

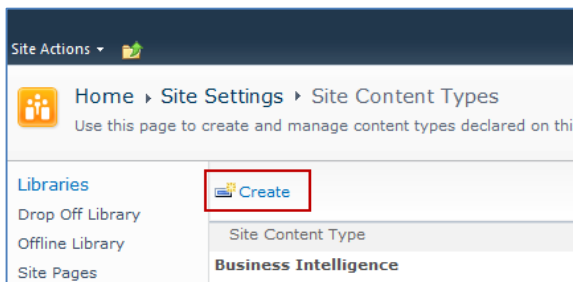
Adding a New Content Type to a Library

When creating an email content type, suitable SharePoint permissions are required. Typically, the email content type is created in the top level site within a site collection, allowing inheritance and customization in sub-sites.


1. In your document library, select **Site Actions > Site Settings**.
2. In the **Galleries** section, select **Site content types**:



3. In the **Site Content Types** page, click **Create**:



The **New Site Content Type** screen displays:

Site Actions ▾  Tessa MacKinnon ▾

Home ▸ Site Settings ▸ Site Content Types ▸ New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

I Like It Tags & Notes

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

Parent Content Type:

Description: Create a new document.

Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

☒ Existing group:

☐ New group:

OK Cancel

4. Enter the following information:
 - a. **Name and Description**
 - i. **Name:** enter a name for the content type
 - ii. **Description:** enter a description for the content type
 - iii. **Parent Content Type:** from the first drop-down list, select the parent content type group; in the second drop-down list, select the parent content type.
 - b. **Group:** choose if the content type is put into either:
 - i. **Existing group:** choose an existing content group from the drop-down menu
 - ii. **New group:** enter a name for a new content group
5. Click **OK**.
The content type is added.


Configuring Content Types

After adding a content type, you can add existing site columns as well as create new site columns.

1. On the new content type page, click either:
 - a. **Add from existing site columns**
 - b. **Add from new site column**

Add Columns to a Content Type:

2. Enter the following information:
 - a. **Select Columns:** choose a group from the **Select Columns from** drop-down menu
 - b. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type
3. Click **OK** to display the **New Site Column** screen:

Site Actions  Tessa MacKinnon

Home > Site Settings > New Site Column

Use this page to add a site column.

Home Arne Test Gregor Test Valentina Test Andrew Test Eric Test Eve test Senior Management Braeden's Demo Site Susan Test
Jinks Kaczor Dyck LLC Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Henderson Special Column Test Bernard Test
BeeDub Test test_new_site TessaTest

Libraries



- Drop Off Library
- Offline Library
- Site Pages
- brads_folders
- brads_folders_2
- brads_emails
- lotus_notes_emails
- DarylTest
- DarylTest2
- Susan
- a new library
- Test
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Discussions

- Team Discussion

 Recycle Bin
 All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Full HTML content with formatting and constraints for publishing
- ☐ Image with formatting and constraints for publishing
- ☐ Hyperlink with formatting and constraints for publishing
- ☐ Summary Links data
- ☐ Rich media data for publishing
- ☐ Managed Metadata

Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

- ☒ Existing group:
- ☐ New group:

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☐ Yes ☒ No

Maximum number of characters:

Default value:
☒ Text ☐ Calculated Value

Update List and Site Content Types

Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?
☒ Yes ☐ No

Column Validation

4. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name
 - ii. Choose a type of information contained in the column
 - b. **Group:** choose if the column will belong to an existing group or a new one
 - c. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Maximum number of characters:** enter the maximum number of characters you want to have in this column

- iv. **Default Value:** choose **Text** or **Calculated Value**
- d. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type

After adding the columns to the Email Content Type you may choose to re-order the columns and/or make the columns hidden.

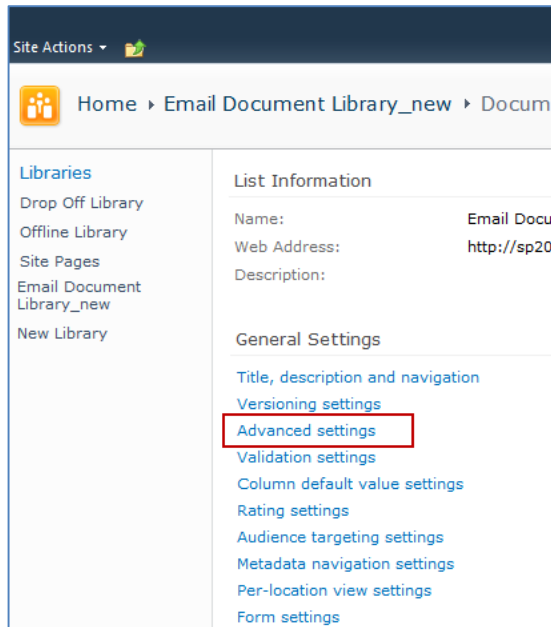
Hiding Columns

If you choose to make a column Hidden, the column is **not** displayed in the properties page of SharePoint, or Colligo Briefcase's default metadata editor dialog box.

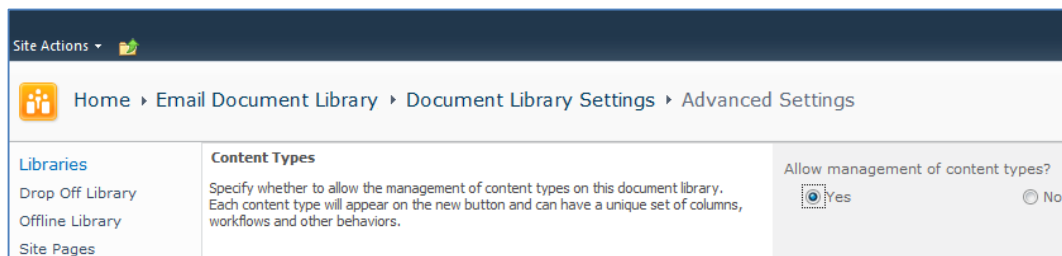
However, Colligo Briefcase still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

Adding a New Content Type to Library

1. In your document library, go to **Library Tools** > **Library** ribbon and click the **Library Settings** icon.
2. In the **General Settings** section, click the **Advanced settings** link:



3. In the **Advanced Settings** screen, ensure the **Allow management of content types** option is set to **Yes**:



4. Click **OK** to save the changes and return to the Library Settings screen.
5. On the **Document Library Settings** screen, scroll down to the **Content Types** section:

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Document	✓	
Add from existing site content types Change new button order and default content type		

6. Click the **Add from existing site content types** link.
7. In the **Add Content Types** screen, select a content type from the **Available Site Content Types** list, and click **Add**:

Site Actions ▾

Home ▸ Email Document Library_new ▸ Document Library Settings ▸ Add Content Types

Use this page to add new content types to this list.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:

All Groups

Available Site Content Types:

- Allow any content type *
- Audio
- Basic Page
- brads_custom_ct
- Document Set
- Dublin Core Columns
- Email**
- Email_new
- Form
- Image
- Link to a Document

Description: None

Group: Custom Content Types

Content types to add:

Buttons: Add > < Remove

Buttons: OK Cancel

8. Click **OK** to return to the **Document Library Settings** screen.
- The new content type displays in the **Content Types** section:

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Email	✓	✓
Document	✓	
Add from existing site content types Change new button order and default content type		

Creating a Library Without Content Types

If you do not wish to use content types in your SharePoint library, you can add columns directly to the library to enable email metadata mapping. See **Enabling Metadata Extraction** for the metadata fields and default column names.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Library Settings** icon.
2. In the **Document Library Settings** screen, scroll down to the **Columns** section and click **Create Column**:

Column (click to edit)	Type	Required
Title	Single line of text	
Attachment	Yes/No	
Checked Out To	Person or Group	

[Create column](#)
[Add from existing site columns](#)
[Column ordering](#)
[Indexed columns](#)

The **Create Column** screen displays:

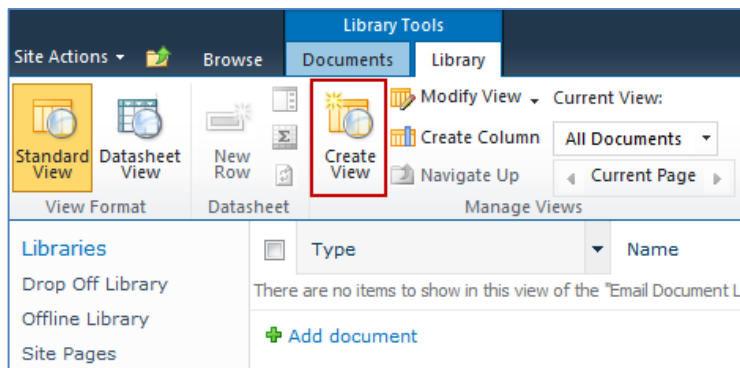
3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name

- ii. Choose a type of information contained in the column
- b. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Enforce unique values:** choose Yes if you want this column to have a unique value
 - iv. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
 - v. **Default Value:** choose **Text** or **Calculated Value**
 - vi. **Add to default view:** check this box if you want this column to display in the default view
- 4. Click **OK**.
The new column displays in the **Columns** section in your **Document Library Settings** list.

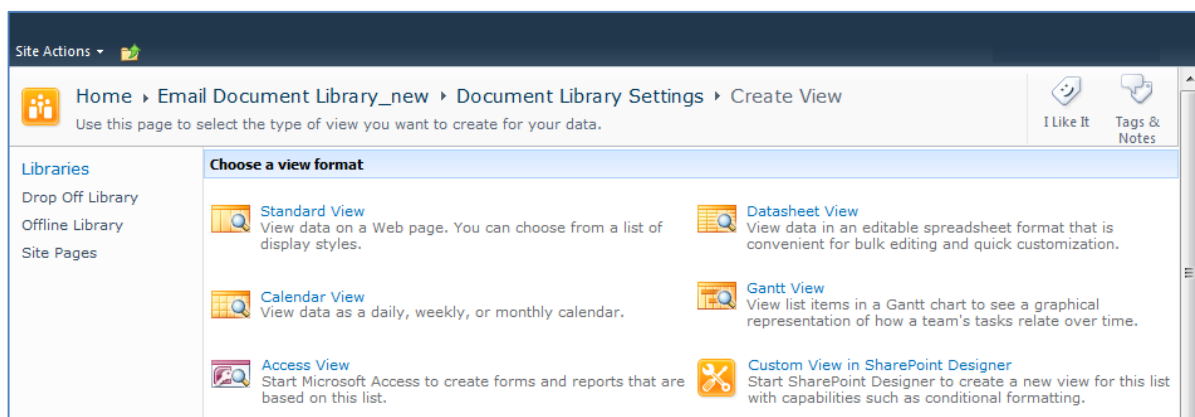
Creating An Email View

After you have defined your content type and added it to your library, it is recommended that you create an email view.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Create View** icon:



The **Create View** screen displays:



2. Click the **Standard View** link.
The configuration options for the standard view display:

Site Actions

Home » Email Document Library_new » Document Library Settings » Create View

Use this page to create a view of this document library.

I Like It

Tags & Notes

Libraries

Drop Off Library

Offline Library

Site Pages

Email Document Library_new

New Library

Lists

Calendar

Case

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

☐ Make this the default view
(Applies to public views only)

Audience

Select the option that represents the intended audience for this view.

View Audience:

☐ Create a Personal View
Personal views are intended for your use only.

☒ Create a Public View
Public views can be visited by anyone using the site.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

None

☒

1
2
3

 Show items in ascending order
(A, B, C, or 1, 2, 3)

☐

3
2
1

 Show items in descending order
(C, B, A, or 3, 2, 1)

Then sort by the column:

None

☒

1
2
3

 Show items in ascending order
(A, B, C, or 1, 2, 3)

☐

3
2
1

 Show items in descending order
(C, B, A, or 3, 2, 1)

☐ Sort only by specified criteria (folders may not appear before items).

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

☒

--	--	--	--

 Show all items in this view

☐

--	--	--	--

 Show items only when the following is true:

Show the items when column

None

is equal to

And

Or

When column

None

is equal to

Show More Columns...

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

☒ Enable this view for mobile access
(Applies to public views only)

☐ Make this view the default view for mobile access
(Applies to public views only)

Number of items to display in list view web part for this view:

3

Field to display in mobile list simple view:

Name (linked to document with edit menu)

OK

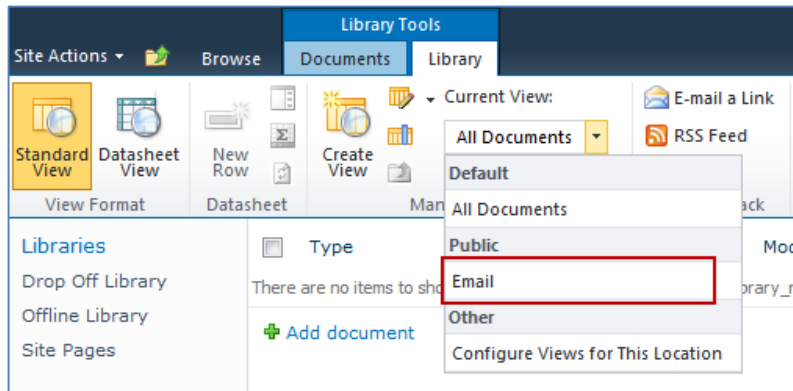
Cancel

20/11/2013

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Not to be reproduced without permission. Learn more at www.colligo.com.

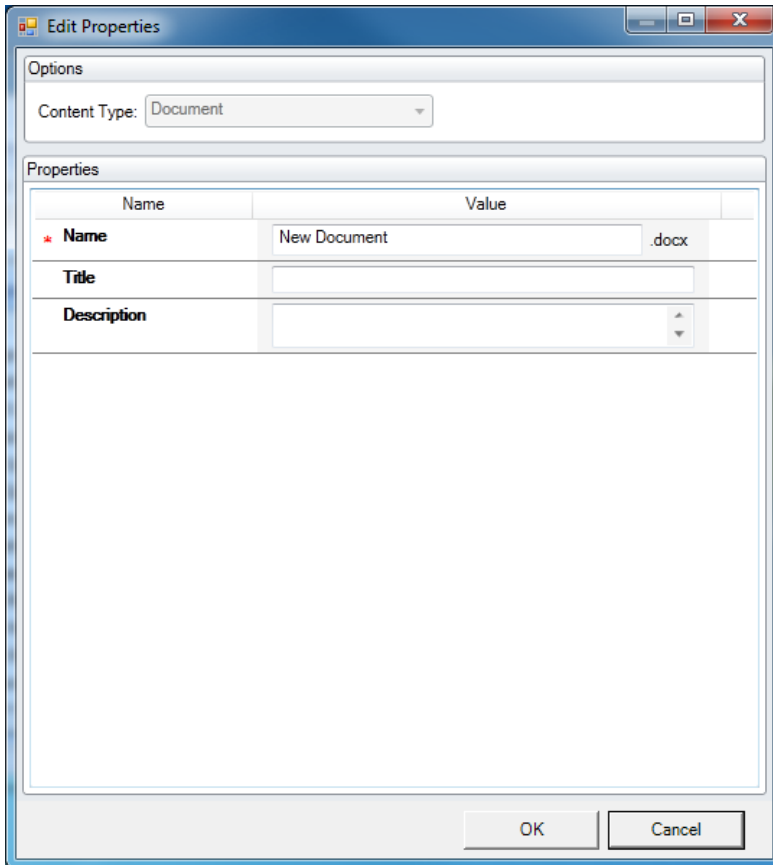
Page 26 of 30

3. Enter the **Name** and **Audience** for your view.
4. Click **OK**. You can now select this view from your **Current View** list in your **Library** ribbon:



Validating Metadata Extraction

To validate that your metadata is being extracted correctly, drag-and-drop an email into a folder, and check that the correct metadata is being displayed and extracted:



Changing Column Mappings

By default, the required SharePoint column display name matches the Outlook message field name shown in the table in **Manually Creating Content Types**.

The email configuration file allows you to override the default mapping of the Outlook message field name to the SharePoint column display name.

Name the file `EmailConfig.xml` and store it in the following location: `<%UserProfile%>\Application Data\Local\Colligo Offline Client\Config\Email`

NOTE: the Colligo folder must be manually created.

To adjust the SharePoint metadata column name for a particular Outlook message field, the **SPColumn** attribute of the appropriate Mapping element is changed. It is also possible to specify multiple mappings for the same message field. That is, the same field can be mapped to multiple SharePoint metadata columns.

The format of the `EmailConfig.xml` file is shown below:

```
<?xml version="1.0" encoding="utf-8"?>
<CfsEmail>
  <Mappings>
    <Mapping Field="Attachment" SPColumn="Attachment"/>
    <Mapping Field="Bcc" SPColumn="Bcc"/>
    <Mapping Field="Bcc-Address" SPColumn="Bcc-Address"/>
    <Mapping Field="Bcc-Type" SPColumn="Bcc-Type"/>
    <Mapping Field="Categories" SPColumn="Categories"/>
    <Mapping Field="Cc" SPColumn="Cc"/>
    <Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
    <Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
    <Mapping Field="Conversation" SPColumn="Conversation"/>
    <Mapping Field="From" SPColumn="From"/>
    <Mapping Field="From-Address" SPColumn="From-Address"/>
    <Mapping Field="From-Type" SPColumn="From-Type"/>
    <Mapping Field="Importance" SPColumn="Importance"/>
    <Mapping Field="Message Body" SPColumn="Message Body"/>
    <Mapping Field="Received" SPColumn="Received"/>
    <Mapping Field="Received-UTC" SPColumn="Received-UTC"/>
    <Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
    <Mapping Field="Sent" SPColumn="Sent"/>
    <Mapping Field="Sent-UTC" SPColumn="Sent-UTC"/>
    <Mapping Field="Signed By" SPColumn="Signed By"/>
    <Mapping Field="Subject" SPColumn="Subject"/>
    <Mapping Field="Subject" SPColumn="Title"/>
    <Mapping Field="Subject" SPColumn="Email Subject"/>
    <Mapping Field="Categories" SPColumn="Email Categories"/>
    <Mapping Field="To" SPColumn="To"/>
    <Mapping Field="To-Address" SPColumn="To-Address"/>
    <Mapping Field="To-Type" SPColumn="To-Type"/>
    <Mapping Field="Original Filename" SPColumn="Original Filename" />
    <Mapping Field="Original Bytes" SPColumn="Original Bytes" />
    <Mapping Field="Original Created" SPColumn="Original Created" />
    <Mapping Field="Original Modified" SPColumn="Original Modified" />
    <Mapping Field="Original Created UTC" SPColumn="Original Created UTC" />
    <Mapping Field="Original Modified UTC" SPColumn="Original Modified UTC" />
  </Mappings>
</CfsEmail>
```

Centrally Configuring Content

The Colligo for SharePoint Site Config File allows IT administrators to define a minimal set of sites, lists, libraries, and folders to be synchronized to a user's computer.

To generate a site config file, you need to first set up your Briefcase workspace as preferred. Download your desired sites, and select the entire site or the desired lists and libraries for synchronization. You can also select individual folders or views for synchronization (rather than synchronizing an entire document library). All these settings are specified using the standard Briefcase user interface.

Once the synchronization settings are set up as desired, export the site config file using the **File > Export Site Configuration File** menu option within Briefcase. The only file name requirement is that it must have a .xml extension.

Reading the Site Config File

By default, Briefcase synchronizes all sites on startup, and periodically every 30 minutes thereafter. You can configure the timing of these background synchronizations.

Prior to each background sync, Briefcase searches for site config files in the specified locations. All sites, lists, libraries, and folders specified in the site config files that are found are downloaded and synchronized as part of the background sync.

If a user deletes a site, or deselects a list, library, or folder that is included in a site config file, the content is re-enabled for synchronization at the time of the next background sync.

Site Config File Location

To apply the site config settings on a particular user's machine, the file must be copied to one of the following locations:

- <%UserProfile%>\Application Data\ColligoOfflineClient\Config\Sites
- <%UserProfile%>\Local Settings\Application Data\ColligoOfflineClient\Config\Sites
- <%AllUsersProfile%>\Application Data\ColligoOfflineClient\Config\Sites

Node Format

Each site defined in the Site Config File may contain zero or one <Outlook> nodes. The <Outlook> node may contain one or more <Folder> nodes. The <Folder> node provides details to Briefcase to create the folder. A sample <Outlook> node is shown below:

```
<Outlook>
  <Folder>
    <ListID>{2B8A5A19-E4C9-4FBB-A941-A2AC14BB69B4}</ListID>
    <Name> Documents (Offline)</Name>
    <ParentName>Project 44-12</ParentName>
    <Offline>true</Offline>
  </Folder>
  <Folder>
    <ListID>{2B8A5A19-E4C9-4FBB-A941-A2AC14BB69B4}</ListID>
    <Name>Documents (Online)</Name>
    <ParentName>Project 44-12</ParentName>
    <Offline>false</Offline>
    <OnlineUrl>http://server/Documents</OnlineUrl>
  </Folder>
</Outlook>
```

<Folder Node> Children

Name	Required	Values	Description
ListID	Yes	Any valid GUID	SharePoint's ListID for the specified list
Name	Yes	String	Name of folder to create in Outlook
ParentName	No	String	If specified, Briefcase creates a parent folder for this list
Offline	No	true false	true: Briefcase displays the Briefcase Add-In offline view false: Briefcase sets the home page to a specified url
OnlineUrl	No	Any valid url	If <Offline> is false the folder-home page is set to this url (ignored if <Offline> is true)

Errors

If the format of a site config file is invalid, an error message is logged each time the file is read. The error message is logged to the Briefcase log file, found under the **Help > Open Log File Folder** menu option.

NOTE: XML is a case-sensitive language. Ensure any manually created nodes use the correct case.

If the user's default credentials are not sufficient to gain access to a site contained in the site config file, an access error displays in the **Errors and Conflicts** pane. When users double-click on this error, they are given the option to change their credentials for the site. On the next background sync cycle, Briefcase attempts to download the site using the new credentials.

Uninstalling Colligo Briefcase

To uninstall, Colligo Briefcase, complete the following steps:

- 1) In your Control Panel, choose **Uninstall a Program** from the **Programs** group.
- 2) Select **Colligo Briefcase** in the program list and click **Uninstall**.