# Colligo Briefcase for Windows 6.2

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: <a href="http://www.colligo.com/support/">http://www.colligo.com/support/</a>

For any further technical details please contact Colligo Technical Support <u>here</u>, or for sales related question please contact <u>sales@colligo.com</u>.

## **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 ranges from 40 – 60 MB in size. When installed, it consumes less than 20 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.

# **SharePoint Security & Privileges**

By using SharePoint's web services to access SharePoint data, Colligo Briefcase respects all privileges defined on the site. 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 authentication types are supported:

- Forms based
- Classic mode (SharePoint 2007/2010)
- Claims based (SharePoint 2010/2013)
- Office 365
- ADFS 2.0, 3.0

SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for uploading documents to SharePoint.

# **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
  - o <a href="http://www.microsoft.com/en-us/download/details.aspx?id=25150">http://www.microsoft.com/en-us/download/details.aspx?id=25150</a>
- Microsoft .NET framework 4.0 Runtime
  - <u>http://www.microsoft.com/download/en/details.aspx?id=17718</u>
- Microsoft Office 2007, 2010, 2013
- Microsoft Office PIAs
  - Office 2010: <u>http://www.microsoft.com/download/en/details.aspx?id=3508</u>
  - Office 2007: <u>http://www.microsoft.com/download/en/details.aspx?id=18346</u>
- Microsoft Visual C++ 2010 Redistributable Package
  - o 32-bit Operating System: <u>http://www.microsoft.com/download/en/details.aspx?id=5555</u>
  - 64-bit Operating System: <u>http://www.microsoft.com/download/en/details.aspx?id=14632</u>
- Windows Identity Foundation: <a href="http://www.microsoft.com/en-ca/download/details.aspx?id=17331">http://www.microsoft.com/en-ca/download/details.aspx?id=17331</a> 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 <u>www.colligo.com</u>)
- 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\02007PIA.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 <a href="http://www.colligo.com/support/colligo-briefcase-for-windows/configuration-settings/">http://www.colligo.com/support/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 <a href="http://www.colligo.com/support/colligo-briefcase-for-windows/configuration-settings/">http://www.colligo.com/support/colligo-briefcase-for-windows/configuration-settings/</a>

# **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: <u>http://support.microsoft.com/kb/255905/EN-US/</u>

#### Installing the Orca MSI editor

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

## 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.

🔁 ColligoEmailManager_x86.m	si - O	Drca	
File Edit Tables Transform	n T	ools View Help	
D 🚅 🖬 🕹 🖻 🕄 🖄	*	: •= 🖻 🛒 🏪	
Tables		Property	Value 🔺
MsiAssemblyName		UpgradeCode	{7D6190A9-B50F-4798-8307-486DFC41742F}
MsiDigitalCertificate		VSDFrameworkVersion v4.0	
MsiDigitalSignature		VSDAllowLaterFrameworkVersions False	
MsiFileHash		ProductName	Colligo Email Manager
MsiPatchHeaders		ProductCode	{DE7F1847-1ADB-4A9D-B784-9E63F30EC0D1}
ODBCAttribute		ProductVersion	5.0.065
ODBCDataSource		Manufacturer	Colligo Networks
ODBCDriver		ARPCONTACT	Colligo Networks
ODBCSourceAttribute		ProductLanguage	1033
ODBCTranslator		ARPPRODUCTICON	_853F67D554F05449430E7E.exe
Patch		SecureCustomProperties	PREVIOUSVERSIONSINSTALLED; NEWERPRODUC
PatchPackage		VSDNETURLMSG This setup requires the .NET Framework version	
ProgId		VSDIISMSG This setup requires Internet Information Server 5	
Property		VSDUIANDADVERTISED	This advertised application will not be installed
PublishComponent	=	VSDNETMSG	This setup requires the .NET Framework version
RadioButton		VSDINVALIDURLMSG	The specified path '[2]' is unavailable. The Intern
RegLocator		VSDVERSIONMSG	Unable to install because a newer version of this
Registry		MaintenanceForm_Action	Repair
RemoveFile		ErrorDialog	ErrorDialog
RemoveIniFile		SFF UpFldrBtn	UpFldrBtn
RemoveRegistry	*	SEE NewEldrBtn	NewFldrBtn
Tables: 88		Property - 35 rows	No column is selected.

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

Name	Value			
Property				
Value				
Column				
Property - :	string[/2], Ki	equired	_	

- 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.
- 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:

#### **Colligo Briefcase**

📸 Registry Editor			
File Edit View Favorites Help			
File Edit View Favorites Help	Name (Default) a) ShowTreeview	Type REG_SZ REG_SZ	Data (value not set) 1
Config  Config  Config  Config  MainWindow  Config  MainWindow  Config  Confi	New	Key String Value Binary Value DWORD (32 QWORD (64 Multi-String Expandable	e e I-bit) Value I-bit) Value g Value String Value
Macromedia     MadCan Software	< III		
Computer\HKEY_CURRENT_USER\Software\Colligo\Contributor\Briefo	ase\UserInterface\Config		h.

A new String Value appears in the Name list.

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:

Vame	Туре	Data
赴 (Default)	REG_SZ	(value not set)
ab Show Treeview	REG_SZ	1
EnableMetadata	romet REG S7	
	Modify	
	Modify Binary Data	
	Delete	
	Rename	

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

Edit String	×
Value name:	
EnableMetadataPrompt	
Value data:	
	OK Cancel

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: <u>http://msdn2.microsoft.com/en-us/library/aa979690.aspx</u>.

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: <u>http://msdn2.microsoft.com/en-us/library/ms954084.aspx</u>.

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, <u>http://www.colligo.com/support/setting/web-proxy-type/</u>

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

## **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: <u>http://en.wikipedia.org/wiki/Encrypting\_File\_System</u>. 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: <a href="http://www.microsoft.com/technet/archive/security/topics/issues/fipseval.mspx">http://www.microsoft.com/technet/archive/security/topics/issues/fipseval.mspx</a>.

# 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 of 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**

Colligo Briefcase for Windows supports AD FS 2.0 and 3.0 (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.

**NOTE**: Configuration settings for AD FS 2.0 or 3.0 can be found on our website: <u>http://www.colligo.com/support/setting/adfs/</u>

## 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 Office 365.

## **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

AD FS 2.0       Endpoints       Actions         Service       Enabled       Proxy Enabled       URL Path       Type       Actions         Calim Descriptions       Token Issuance       View       New Window from Here         Calim Descriptions       Yes       n/a       /adfs/services/trust/2005/windows       WS-Trust 2         Calim Descriptions       Yes       n/a       /adfs/services/trust/2005/windows       WS-Trust 2         Calim Descriptions       Yes       Yes       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         No       No       /adfs/services/trust/2005/cetflicatem       WS-Trust 2         Yes       Yes       /adfs/services/trust/2005/cetflicatem       WS-Trust 2         No       No       /adfs/services/trust/2005/cetflicatem       WS-Trust 2         No       No       /adfs/services/trust/2005/usemame       WS-Trust 2         No       No       /adfs/services/trust/2005/usemame       WS-Trust 2         No       No       /adfs/services/trust/2005/usemameanbeaictransport       WS-Trust 2         No       No       /adfs/services/trust/2005/usemameanbeaictransport       WS-Trust 2         No       No       /adfs/services/trust/2005/usemameanbeaictransport       WS-Trust 2         No <td< th=""><th colspan="6">🍿 AD FS 2.0 \Service \Endpoints</th></td<>	🍿 AD FS 2.0 \Service \Endpoints					
Service       Enabled       Proxy Enabled       URL Path       Type       Indpoints         Certificates       Certificates       Token Issuance       View       New Window from Here         Claim Descriptions       Yes       n/a       /adfs/services/tust/2005/windows       WS-Trust 2!       New Window from Here         Claim Descriptions       Yes       n/a       /adfs/services/tust/2005/windows       WS-Trust 2!       New Window from Here         Claim Descriptions       Yes       n/adfs/services/tust/2005/certificate       WS-Trust 2!       New Window from Here         Claim Descriptions       Yes       /adfs/services/tust/2005/certificate       WS-Trust 2!       New Window from Here         Claim Descriptions       Yes       Yes       /adfs/services/tust/2005/certificate       WS-Trust 2!       New Window from Here         No       No       No       /adfs/services/tust/2005/certificate       WS-Trust 2!       New S-Trust 2!       New S-Trust 2!         Yes       Yes       Yes       /adfs/services/trust/2005/usemamebasic/transport       WS-Trust 2!       Na No       /adfs/services/trust/2005/usemamebasic/transport       WS-Trust 2!       Na S-Trust 2!       Ne S-Trust 2!       N	D FS 2.0	Endpoints				Actions
Certificates       Token Issuance       New Window from Here         Caim Descriptions       Yes       n/a       //adfs/services/tust/2005/windows       WS-Trust 21         Caim Provider Trusts       No       No       //adfs/services/tust/2005/windowsmixed       WS-Trust 21         Relying Party Trusts       Yes       Yes       //adfs/services/tust/2005/windowsmixed       WS-Trust 21         No       No       //adfs/services/tust/2005/certificate       WS-Trust 21         No       No       //adfs/services/tust/2005/certificate       WS-Trust 21         Yes       Yes       //es       //adfs/services/tust/2005/certificate       WS-Trust 21         No       No       //adfs/services/tust/2005/certificate       WS-Trust 21         No       No       //adfs/services/tust/2005/certificate       WS-Trust 21         No       No       //adfs/services/tust/2005/usemame       WS-Trust 21         No       No       //adfs/services/tust/2005/usemamemixed       WS-Trust 21         No       No       //adfs/services/tust/2005/usemamemixed       WS-Trust 21         No       No       //adfs/services/tust/2005/useedtokenmixedasymmetricbasic256       WS-Trust 21         No       No       //adfs/services/tust/2005/issuedtokenmixedasymmetricbasi       WS-Trust 21	Endpoints	Enabled	Proxy Enabled	URL Path	Туре 🔺	Endpoints 🔺
Claim Descriptions       Yes       n/a       /adfs/s/       SAML 2.0/         Image: Trust Relationships       No       No       /adfs/services/trust/2005/windows       WS-Trust 2         Image: Relying Party Trusts       No       No       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         Image: Relying Party Trusts       No       No       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         Image: Relying Party Trusts       No       No       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         Image: No       No       No       /adfs/services/trust/2005/windowsmappot       WS-Trust 2         Image: No       No       /adfs/services/trust/2005/windowsmappot       WS-Trust 2         Image: Yes       Yes       Yes       /adfs/services/trust/2005/wemame       WS-Trust 2         Image: Yes       Yes       /adfs/services/trust/2005/wemame/basictransport       WS-Trust 2       Disable on Proxy         Image: No       No       No       /adfs/services/trust/2005/usemame/basictransport       WS-Trust 2       Ns       Ns         Yes       Yes       Yes       Yes       /adfs/services/trust/2005/suedtokenasymmetricbasic256       WS-Trust 2       Ns       Ns       Ns       Ns       Ns       Ns       Ns       Ns       N	Certificates	Token Is	suance			View 🕨
□       Trust Relationships       No       No       /adfs/services/trust/2005/windows       WS-Trust 2         □       Claims Provider Trusts       No       No       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         □       Refresh       WS-Trust 2       Yes       Yes       Yes       /adfs/services/trust/2005/windowsmixed       WS-Trust 2         □       No       No       /adfs/services/trust/2005/cettficate       WS-Trust 2       /adfs/services/trust/2005/cettficatemixed       WS-Trust 2         □       Yes       Yes       /adfs/services/trust/2005/cettficatemixed       WS-Trust 2       /adfs/services/trust/2005/usemame       WS-Trust 2         No       No       /adfs/services/trust/2005/usemame       WS-Trust 2       /isable on Proxy       Disable on Proxy         Disable       No       No       /adfs/services/trust/2005/usemame/basictransport       WS-Trust 2       /isable       /ieable         Yes       Yes       Yes       /adfs/services/trust/2005/usemame/basictransport       WS-Trust 2       /isable       /ieable         No       No       /adfs/services/trust/2005/usemame/basictransport       WS-Trust 2       /ieable       /ieable       /ieable         Yes       Yes       Yes       /adfs/services/trust/2005/usemame/basictransport	Claim Descriptions	Yes	n/a	/adfs/ls/	SAML 2.0/V	New Window from Here
Claims Provide Trusts       No       No       /adfs/services/tust/2005/windowsmixed       WS-Trust 2         Yes       Yes       Yes       /adfs/services/trust/2005/windowstransport       WS-Trust 2         No       No       /adfs/services/trust/2005/certificate       WS-Trust 2         Yes       Yes       /adfs/services/trust/2005/certificate       WS-Trust 2         Yes       Yes       /adfs/services/trust/2005/certificatemixed       WS-Trust 2         No       No       /adfs/services/trust/2005/certificatemixed       WS-Trust 2         No       No       /adfs/services/trust/2005/usemame       WS-Trust 2         No       No       /adfs/services/trust/2005/usemame       WS-Trust 2         No       No       /adfs/services/trust/2005/usemamemixed       WS-Trust 2         Yes       Yes       /adfs/services/trust/2005/usemamemixed       WS-Trust 2         Yes       No       /adfs/services/trust/2005/useedtokenasymmetricbasic256       WS-Trust 2         No       No       /adfs/services/trust/2005/useedtokenasymmetricbasic256       WS-Trust 2         No       No       /adfs/services/trust/2005/useedtokenasymmetricbasic256       WS-Trust 2         No       No       /adfs/services/trust/2005/useedtokenasymmetricbasic.       WS-Trust 2 <td< td=""><td>Trust Relationships     Chime Provider Truste</td><td>No</td><td>No</td><td>/adfs/services/trust/2005/windows</td><td>WS-Trust 2</td><td>Dafach</td></td<>	Trust Relationships     Chime Provider Truste	No	No	/adfs/services/trust/2005/windows	WS-Trust 2	Dafach
Yes       Yes       Yes       /adfs/services/trust/2005/vindowstransport       WS-Trust 21         No       No       /adfs/services/trust/2005/certificate       WS-Trust 21         Yes       Yes       /adfs/services/trust/2005/certificate       WS-Trust 21         Yes       Yes       /adfs/services/trust/2005/certificate       WS-Trust 21         Yes       Yes       /adfs/services/trust/2005/certificateransport       WS-Trust 21         No       No       /adfs/services/trust/2005/usemame       WS-Trust 21         No       No       /adfs/services/trust/2005/usemame       WS-Trust 21         No       No       /adfs/services/trust/2005/usemame       WS-Trust 21         Yes       Yes       /adfs/services/trust/2005/usemamemixed       WS-Trust 21         Yes       No       /adfs/services/trust/2005/usemamemixed       WS-Trust 21         No       No       /adfs/services/trust/2005/useedtokenasymmetricbasic256       WS-Trust 21         No       No       /adfs/services/trust/2005/useedtokenasymmetricbasic256       WS-Trust 21         Yes       Yes       /adfs/services/trust/2005/useedtokenmixedasymmetricbasi       WS-Trust 21         No       No       /adfs/services/trust/2005/useedtokenmixedasymmetricbasi       WS-Trust 21         No	Relving Party Trusts	No	No	/adfs/services/trust/2005/windowsmixed	WS-Trust 20	Ca Refresh
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					Þ	

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

AD FS 2.0 \Service\Endpoints					_0×
AD FS 2.0	Endpoints				Actions
AD FS 2.0 Service Endpoints Catificates Claim Descriptions Claims Provider Trusts Relying Party Trusts Attribute Stores	Endpoints Enabled No No Yes No Yes	Proxy Enabled No Yes No Yes No No No No No No No No No No Yes Yes Yes No	URL Path /adfs/services/trust/13/issuedtokenasymmetricbasic256sh /adfs/services/trust/13/issuedtokennixedasymmetricbasic /adfs/services/trust/13/issuedtokennixedasymmetricbasic2 /adfs/services/trust/13/issuedtokennixedsymmetricbasic2 /adfs/services/trust/13/issuedtokensymmetricbasic256 /adfs/services/trust/13/issuedtokensymmetricbasic256sha /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledessha /adfs/services/trust/13/issuedtokensymmetrictpiledessha /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/issuedtokensymmetrictpiledes /adfs/services/trust/13/windows /adfs/services/trust/13/windows /adfs/services/trust/13/windows /adfs/services/trust/attfactresolution /adfs/services/trust/mex /FederationMetadata/2007-06/FederationMetadata.xml /adfs/sfederationserverservice.asmx	Type         Image: Constant of the second seco	Actions Endpoints View New Window from Here Refresh Help /adfs/services/trust/13/  Enable on Proxy Disable P Help
	105 1			×	
Refreshes the current selection.					

Кеу	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	<adfs display="" for="" name="" only="" purposes="" –=""></adfs>
Value Data	<ad 2.0="" <u="" e.g.="" fs="" name:="" server="">https://adfs.mycompany.com &gt; <adfs e.g.="" for="" realm="" server="" sharepoint="" urn:sharepointsvradfs:sharepoint=""></adfs></ad>
Value Type	String

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

# Server Requirements for AD FS 3.0

The following image is found on the ADFS Server located on the same domain as your SharePoint site.

<b>\$</b> #	AD FS
🏟 File Action View Window Help	
🗢 🔿 🗾 🖬 🖬	
AD FS	Claims Provider Trusts
<ul> <li>Service</li> <li>Endpoints</li> <li>Certificates</li> <li>Claim Descriptions</li> <li>Trust Relationships</li> <li>Claims Provider Trusts</li> <li>Relying Party Trusts</li> <li>Attribute Stores</li> <li>Authentication Policies</li> </ul>	Client Adfs Properties           Offered Claims         Organization         Endpoints         Notes         Advanced           Monitoring         Identifiers         Certificates         Encryption           Specify the display name and identifier for this claims provider trust. Some fields are disabled because automatic overwrites are enabled on the Monitoring tab for this claims provider trust.         Display name:           Client Adfs         Claims provider identifier:           Claims provider identifier:         Example: https://fs.fabrikam.com/adfs/services/trust
	OK Cancel Apply

When publishing your web application, for the **Preauthentication** method, choose **Pass-through** rather than AD FS:

8		Remote Access Management Console		- 0 ×
Configuration			>	Tasks
Web Application Proxy	All published web applicatio	ns   1 total	General	^
M Operations Status	5j	Publish New Application Wizard	×	
	Preauthentication	co	NECTED TO AD FS	- Pass Through
	Welcome Preauthentication Publishing Settings Confirmation Results	<ul> <li>Specify the preauthentication method:</li> <li>Active Directory Federation Services (AD FS)</li> <li>An unauthenticated client requests are redirected to the federation server. After succe an also provide credentials to backend servers that are configured to use Integrated cultentication.</li> <li>Pass-through</li> <li>A preauthentication is performed by Web Application Proxy. All requests are forward backend server.</li> </ul>	isful pplication Proxy Windows ded to the	rd on this application
	L	< Previous Next > Publish	Cancel	
	< Last Refresh On 3/19/2014	III > 4:27:41 PM		

After your AD FS 3.0 server is configured, you need to deploy the following registry key to your users:

Кеу	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	<ad 3.0="" display="" for="" fs="" name="" only="" purposes="" –=""></ad>
Value Data	" <claims identifier="" provider=""> &gt; <adfs server=""> <sharepoint realm="">"</sharepoint></adfs></claims>
	See above
	e.g. urn:sharepointsvradfs:sharepoint>
Value Type	String

## **Distributed Identity Management**

Colligo products support ADFS 3.0 distributed identity management infrastructure where SharePoint authentication is provided through a trust relationship between two ADFS providers.



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

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:

Site Actions 👻 📸						
Home + Site S	Settings					
Libraries Drop Off Library Offline Library		Users and Permissions People and groups Site permissions				
Site Pages brads_folders brads_folders_2 brads_emails lotus_notes_emails DaryITest		Galleries Site columns Site content types Web parts List templates Master pages Themes Solutions				

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:

List Template Gallery - CfsEmailLibrary2010.stp			
Edit			
Save Cancel	Delete Item		
Commit Clipboard	Actions		
Name *	CfsEmailLibrary2010 .stp		
Title	CfsEmailLibrary2010		
Description		*	
		~	
Created at 8/5/2011 10:50 AM Last modified at 8/5/2011 10:50 AM	Save Cancel		

- 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.
- Select Site Actions > More Options. The Create dialog displays.

reate						
Browse From:					Search Installed Items	5
Installed Items > Office.com	Title 🔺 Type				CfsEmailLibrary2010	
Filter By: All Types >					Type: Library Categories: Content	
List	Announcements	Asset Library	Assets Web	Basic Meeting Workspace	Name	
Page			Dutubuse	Workspace	Create More Options	
Site						
All Categories		88.8				
Blank & Custom	Realis Security Contact	Plank Masting	Blank Site	Plan		
Collaboration	Basic Search Center	Workspace	blank Site	Blog		
Content Data Meetings Search	2222222					
Tracking Web Databases	Calendar	CfsEmailLibrary201 0	Charitable Contributions Web	Config		
	8					
	Contacts	Contacts Web Database	Correspondence	Custom List		

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.

Email Metadata	Default Column Name	Туре
Attachment	Attachment	Yes/No
Всс	Всс	Text
Bcc-Address	Bcc-Address	Text
Всс-Туре	Всс-Туре	Text
Categories	Categories	Text
Сс	Сс	Text
Cc-Address	Cc-Address	Text
Сс-Туре	Сс-Туре	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
То	То	Text
To-Address	To-Address	Text
То-Туре	То-Туре	Text

Colligo Briefcase extracts the following metadata properties from emails:

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

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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 👻 🐋		Tes	sa MacKini	non <del>-</del>	
Home > Site Use this page to a type, and future	Settings → Site Content Types → New Site Conter create a new site content type. Settings on this content type are updates to the parent may overwrite settings on this type.	nt Type e initially copied from the parent content	🤣 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         Na           Type a name and description for this content type. The description will be shown on the new button.         De           Pa         Pa	ame: Email escription: arent Content Type: Select parent content type from: Document Content Types Parent Content Type: Document Document Content Type: Content Type: Document Create a new document.	*		III.
	Group Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.	ut this site content type into:  Existing group: Custom Content Types 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

Site Actions 👻 🐋							
Home → Site	Settings ► Site Content T	ypes ► Email			I Like It	Tags & Notes	^
Libraries Drop Off Library	Site Content Type Information	ı					
Offline Library	Description:						
Site Pages Email Document Library_new	Parent: Document Group: Custom Content Type	5					
New Library	Settings						
Lists Calendar Case Discussions Team Discussion	Name, description, and group     Advanced settings     Workflow settings     Delete this site content type     Information management policy se     Manage publishing for this content     Document Information Panel setting	tüngs type igs					II
	Columns						
	Name	Туре	Status	Source			
	Name	File	Required	Document			
	Title	Single line of text	Optional	Item			
	Add from existing site columns     Add from new site column     Column order						*

#### Add Columns to a Content Type:

Site Actions ▼ 📦 Home ▶ Sit Use this page	te Settings + Site Content Types + Email + Add Columns to Con to add site columns to this site content type.	tent Type	i Like It	Tags & Notes	•
Libraries Drop Off Library Offline Library Site Pages Email Document Library_new New Library Lists Calendar Case	Select Columns Select from the list of available site columns to add them to this content type.	Select calums from: All Groups Available columns: Active A	5		
	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			
		OK	Cancel		]

- 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 👻 😏		Te	ssa MacKinnon 🔸
Home > Site Use this page to a	Settings → New Site Column add a site column.		<ul> <li>I Like It</li> <li>Tags &amp; Notes</li> </ul>
Home Arne Test G	regor Test Valentina Test Andrew Test Eric Test Eve test Senior Management	Braeden's Demo Site Susan Test	3
Jinks Kaczor Dyck LLC	Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Hende	erson Special Column Test Bernar	rd Test
BeeDub Test test_nev	v_site TessaTest		
Libraries	Name and Type	Column name:	
Drop Off Library	Type a name for this column, and select the type of information you want to store in the column.		
Offline Library		The type of information in this column	ı is:
brads folders		Single line of text	
brads_folders_2		Choice (menu to choose from)	
brads_emails		© Number (1, 1.0, 100)	
lotus_notes_emails		© Currency (\$, ¥, €)	
DarylTest		Date and Time	
DarylTest2		Cockup (information already on tr () Yes/No (check box)	nis site)
Susan		O Person or Group	
Test		Hyperlink or Picture	
Email Document		Calculated (calculation based on e - Full HTML content with formatting	other columns) and constraints for
Library_new		publishing	
New Library		Image with formatting and constru- Hyperlink with formatting and con-	aints for publishing
Lists		publishing	action as to real
Calendar		Summary Links data	
Case		Managed Metadata	
Discussions	Group	Put this site column into:	
Team Discussion	Specify a site column group. Categorizing columns into groups will make it easier for users to	Existing group:	
Denvela Dia	find them.	Custom Columns	•
All Site Content		O New group:	
	Additional Column Settings	Descriptions	
	Sparify datailed options for the type of information you selected	Description:	*
	apeary actained options for the type of information you deleteen		Ŧ
		Require that this column contains info	rmation:
		Maximum number of characters:	
		Default value:	
	Update List and Site Content Types	Update all content types inheriting fro	m this type?
	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.	Yes      No     No	
	Column Validation		
		ОК	Cancel

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:

Site Actions 👻 🕎							
🚹 Home 🛛 Ema	il Document Library > Document Library Settings > Advanced	Settings					
Libraries	Content Types Specify whether to allow the management of content types on this document library.	Allow management of content types?					
Offline Library	Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.	Yes O No					

- 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	<b>√</b>	به ا		
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 → Em Use this page to	ail Document Library_new >	Document Library Settings + Add Content Type:	S 🤣 🖓 I Like It Tags & Notes
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: Allow any content type * Audio Basic Page brads_custom_ct Document Set Dublin Core Columns Frail_new From Image Link to a Document Description: None Group: Custom Content Types	Content types to add:
			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:

Columns			
A column stores information about each document in the document library. The following columns are currently available in this document library:			
Column (click to edit)	Туре	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:

Site Actions 🔹 😏				
Home   Emai Use this page to a	il Document Library_new > Document Library Settings > Create Column add a column to 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 Discussions Team Discussion	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: ③ Single line of text ③ Multiple lines of text ③ Choice (menu to choose from) ③ Number (1, 1.0, 100) ③ Currency (\$, ¥, €) ③ Date and Time ④ Lookup (information already on this site ④ Yes/No (check box) ④ Person or Group ⑤ Hyperlink or Picture ⑤ Calculated (calculation based on other or ⑥ External Data ④ Managed Metadata	) olumns)	
All Site Content	Additional Column Settings Specify detailed options for the type of information you selected.	Description: Require that this column contains informatio O Yes O No Enforce unique values: O Yes O No Maximum number of characters: 255 Default value: O Calculated Value Add to default view	n:	
	B Column Validation		Canad	
		ОК	Cancel	

#### 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:

## **Colligo Briefcase**

Site Actions 🗸 📩				
Image: Book of this page to create a view of this document library.     Document Library Settings > Create View     Image: Setting				
Libraries		OK Cancel		
Drop Off Library Offline Library	Name	View Names		
Site Pages	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	view Name:		
Email Document Library_new	what to expect when they dick this link.	Make this the default view (Applies to public views only)		
now clorery	Audience			
Lists	Select the option that represents the intended audience for this view.	View Audience:		
Calendar		Personal views are intended for your use only.		
		Oreate 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 <b>Position from left</b> box.	Display Column Name Position from Left		
		Type (icon linked to document)		
		menu)		
		Modified 3		
		e Hounca by		
	➡ Sort Select up to two columns to determine the order in which	First sort by the column:		
	the items in the view are displayed. Learn about sorting items.	None		
		Show items in ascending order     (A B C or 1 3 3)		
		Show items in descending order		
		C, B, A, or 3, 2, 1)		
		Then sort by the column:		
		None		
		<ul> <li>Show items in ascending order</li> <li>(A, B, C, or 1, 2, 3)</li> </ul>		
		Show items in descending order     (C, B, A, or 3, 2, 1)     Sort only by specified criteria (folders may not appear before items).		
	G hiter 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		
		is equal to		
		O And O Or		
		When column		
		None		
		is equal to		
		Show More Columns		
	Inline Editing			
	B Crown Pa			
	æ eroup by ⊞ Totals			
	B Style			
	Folders			
	3 Item Limit			
	Mobile			
	Adjust mobile settings for this view.	<ul> <li>Enable this view for mobile access</li> <li>(Applies to public views only)</li> </ul>		
		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:		
		Field to display in mobile list sizeds view		
		Name (linked to document with edit menu)		
		OK Cancel		

- 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:

Options	Options			
Content Type: Document v				
Properties	Properties			
Name	Value			
* Name	New Document	.docx		
Title				
Description		A 		

## **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 ColligoMappingConfig.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 ColligoMappingConfig.xml file is shown below:

```
<?xml version="1.0" encoding="UTF-8"?>
<ColligoMappingConfig>

    <Mappings>

       <Mapping SPColumn="Attachment" Field="Attachment"/>
       <Mapping SPColumn="Bcc" Field="Bcc"/>
       <Mapping SPColumn="Bcc-Address" Field="Bcc-Address"/>
       <Mapping SPColumn="Bcc-Type" Field="Bcc-Type"/:
       <Mapping SPColumn="Categories" Field="Categories"/>
       <Mapping SPColumn="Cc" Field="Cc"/>
       <Mapping SPColumn="Cc-Address" Field="Cc-Address"/>
       <Mapping SPColumn="Cc-Type" Field="Cc-Type"/>
       <Mapping SPColumn="Conversation" Field="Conversation"/>
       <Mapping SPColumn="From" Field="From"/>
       <Mapping SPColumn="From-Address" Field="From-Address"/>
       <Mapping SPColumn="From-Type" Field="From-Type"/>
<Mapping SPColumn="Importance" Field="Importance"/>
       <Mapping SPColumn="Received" Field="Received"/>
       <Mapping SPColumn="Received-UTC" Field="Received-UTC"/>
       <Mapping SPColumn="Sensitivity" Field="Sensitivity"/>
       <Mapping SPColumn="Sent" Field="Sent"/>
       <Mapping SPColumn="Sent-UTC" Field="Sent-UTC"/>
       <Mapping SPColumn="Subject" Field="Subject"/>
<Mapping SPColumn="Title" Field="Subject"/>
       <Mapping SPColumn="Email Subject" Field="Subject"/>
       <Mapping SPColumn="Email Categories" Field="Categories"/>
       <Mapping SPColumn="To" Field="To"/>
       <Mapping SPColumn="To-Address" Field="To-Address"/>
<Mapping SPColumn="To-Type" Field="To-Type"/>
       <Mapping SPColumn="Original Filename" Field="Original Filename"/>
       <Mapping SPColumn="Original Bytes" Field="Original Bytes"/>
       <Mapping SPColumn="Original Created" Field="Original Created"/>
       <Mapping SPColumn="Original Modified" Field="Original Modified"/>
       <Mapping SPColumn="Original Created UTC" Field="Original Created UTC"/>
       <Mapping SPColumn="Original Modified UTC" Field="Original Modified UTC"/>
    </Mappings>
</ColligoMappingConfig>
```

# **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>
<Offline>talse</Offline>
</Polder>
</Polder>
</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)</offline></offline>

#### 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**.