Contributor Pro 6.2

User Guide



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CONTRIBUTOR PRO

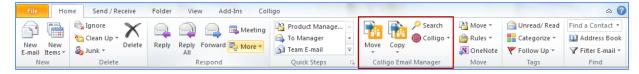
Colligo Contributor Pro provides a complete solution for managing SharePoint enterprise content including emails, documents and other types of content. Colligo Contributor Pro tightly couples Colligo Email Manager and Colligo Briefcase for Windows so users can seamlessly file, tag, sync, view, share and find SharePoint content on Windows PC/laptops anytime, anywhere.

Contributor Pro Interfaces

Colligo Pro consists of two products bundled together: Colligo Email Manager and Colligo Briefcase for Windows.

Colligo Email Manager Interface

Because Colligo Email Manager is an Outlook add-in, you are launching Colligo Email Manager when you launch Outlook. In Outlook, the Colligo Email Manager functionality displays in the **Home** tab ribbon:



And in the Outlook folder tree:



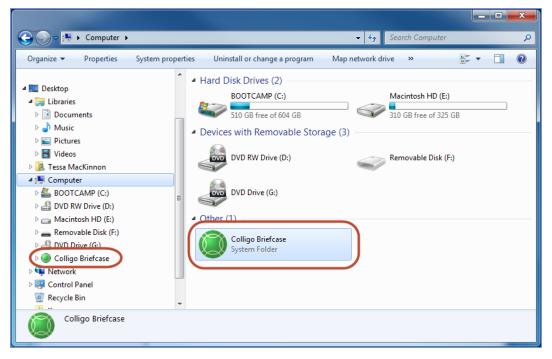
Colligo Briefcase Interface

Colligo Briefcase Enterprise consists of a core, stand-alone product interface and a Windows Explorer extension. Depending on your preference, you can use one or both interfaces as the functionality is essentially identical. Ie. You can perform an action in one interface and the other will reflect the change.

The stand-alone product is launched from the **Start** menu or from the system tray icon and displays as follows:

Colligo Briefcase		
<u>File Site View H</u> elp		
Site: 👸 <no sites=""> 🔹 🕄 Synchron</no>	ze 👻 🆓 View Sync Issues	
Site Content	<u>N</u> ew ▼ <u>U</u> pload ▼ Filter ▼	View:
		No Synchronization Activity
		W Synchionizador Activity

The Windows Explorer extension displays as Colligo Briefcase under the Computer node:



COLLIGO EMAIL MANAGER

Welcome to Colligo Email Manager, the simple, powerful, and reliable solution to enterprise email management in Microsoft SharePoint. Featuring seamless integration with Microsoft Outlook, Colligo Email Manager makes it fast and easy to file, tag, find, view, sync and share email and attachments in SharePoint, all from within the familiar Outlook interface.

Colligo Email Manager streamlines SharePoint interaction by providing simple, intuitive ways to move or copy email and attachments to SharePoint from Outlook, including drag-and-drop or send-and-file. Email metadata is automatically captured for findability, and additional metadata can be easily added to classify content according to corporate guidelines or regulatory requirements. The integrated search functionality searches both SharePoint and Outlook to locate emails, or find documents to send as attachments. SharePoint sites can also be viewed from within Outlook, making finding content a breeze.

Colligo Email Manager also encourages users to file emails and attachments to SharePoint in the office or on the road, and allows mobile and remote workers to remain productive, regardless of network latency or unavailability.

Key Features

- File Drag-and-drop email and attachments to SharePoint within Outlook, using the familiar Outlook folder tree. Send & File button automatically files sent email to SharePoint.
- Tag Add automatic or customized metadata, including managed metadata.
- **Sync** download SharePoint content for offline viewing and editing. File emails even when disconnected from the network.
- Find Search Outlook and SharePoint together. Find your content no matter where it lives.
- View See SharePoint content right inside Outlook. No need to switch to the browser.
- Share Email attachments as links for easy collaboration.
- **Deploy** Deploy easily, client-only installation.

Benefits

- Empower users to easily manage email & documents in SharePoint
- Increase the quantity of content captured & tagged in SharePoint
- Reduce risk, improve compliance & records retention
- Reduce uncontrolled content in personal archives and PSTs
- Make SharePoint accessible in the applications users use every day, everywhere
- Improve collaboration, document & project management
- Drives user adoption of SharePoint by improving ease of use
- Encourage users to file emails and attachments to SharePoint in the office or on the road
- Allow mobile and remote workers to remain productive, regardless of network latency or unavailability

Platforms Supported

- Microsoft Outlook 2007, 2010 SP1, or 2013 (32-bit or 64-bit edition)
- Microsoft SharePoint 2007, 2010, or 2013
- Windows XP SP3, Windows Vista, Windows 7, or Windows 8
- Internet Explorer 7, 8, or 9 (optional)

NOTE: The screenshots in this document use Outlook 2010, SharePoint 2010, and Windows 7. Your user interface may differ depending on your specific configuration.

INSTALLING AND ACTIVATING COLLIGO EMAIL MANAGER

To install and activate Colligo Email Manager:

NOTE: if you have already activated Colligo Briefcase for Windows, you do not need to activate Colligo Email Manager. See Installing and Activating Colligo Briefcase.

- 1. Double-click to open the Colligo Email Manager XX.zip file and extract the contents.
- 2. In the folder, double-click the folder that corresponds with your operating system:
 - a. **x86**: choose this option if you have a 32-bit operating system
 - b. x64: choose this option if you have a 64-bit operating system
- 4. Double-click either Setup.exe or ColligoEmailManager_xNN.msi.
- 5. Follow the steps in the install wizard.
- 6. After installation is complete, enter your information to activate the software. If you do not activate Colligo Email Manager, it does not display.
- 7. If you are unable to connect to the activation server, the following error message displays:



NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

- 8. Click Activate via Email.
- 9. On the following screen, click **Export Activation Request**.
- 10. Save the ActivationRequest.txt file in your preferred location.
- 11. Attach this file to your email and send to activation@colligo.com.

You will receive a response from Colligo Technical Support with instructions for manual activation.

After Colligo Email Manager is installed, a new group called **Colligo Email Manager** displays in the left-hand pane in Microsoft Outlook:



You can now add SharePoint sites and designate folder locations for your Favorites and Folders lists.

Checking for Updates

To check if you are using the most current version of Colligo Email Manager, click the **Colligo** drop-down arrow and select **Check for Updates**.

The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

Updating Your License Key

To change your license key:

1. Click the **Colligo** drop-down arrow and select **Install License Key**.

The Enter License Key dialog displays:

Enter License Key		×
Please enter your 25-digit licens	e key (include dashes):	
	ОК	Cancel

2. Enter your license key and click **OK**.

MANAGING SHAREPOINT SITES

Colligo Email Manager lets you connect to SharePoint sites through Outlook. You can add, edit, and remove sites, as well as add folders to your Favorites and Folders lists.

Adding a SharePoint Site in Email Manager

You can add a SharePoint site to Colligo Email Manager in one of two ways:

- 1. By using the SharePoint Sites dialog in Outlook.
- 2. By using the Connect to Colligo Email Manager button in Internet Explorer.

When you add a site in Colligo Email Manager, it is also added to Colligo Briefcase at the same time.

Using the SharePoint Sites Dialog in Outlook

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

The **SharePoint Sites** dialog displays:

Colligo Email Manager Configurati	ion 📃 🗶
SharePoint Sites	强 SharePoint Sites
Favorites	🔀 Add 🔀 Remove 🖽 Edit 🔯 💭 😭 🖿 🔎
Folders	Add SharePoint Site
Search Locations	
Search Options	
Launchpad	
Settings	
	Close

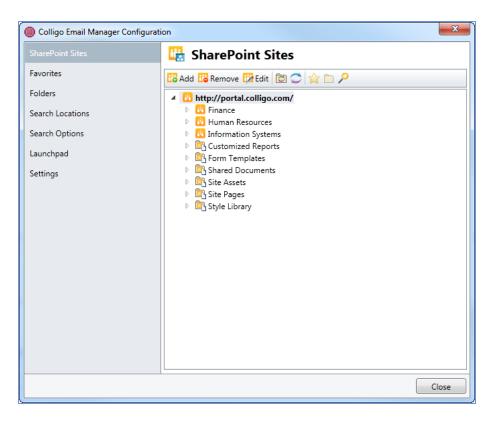
2. Click the Add SharePoint Site link or the Add icon.

The Add SharePoint Site dialog displays:

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Add SharePoint Site	×
URL:	
Examples:	http://server/workspace
	https://secureserver/workspace
Server Authentication	
Authentication Type:	Auto-detect 🔹
	Auto-detect
Use default cre	Windows Classic
Use the following	Windows Claim-based
	Form-Based
User name:	ADFS 2.0
Password:	Office365
1 district di	Office365 by Prompt
Domain:	CORPORATE
	OK Cancel

- 3. Enter the following information in the dialog:
 - a. **URL**: enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address, or drag-and-drop an address from Internet Explorer into the field.
 - b. Server Authentication
 - Authentication Type: choose one of the following options
 - Auto-detect
 - Windows Classic
 - Windows Claim-based
 - Form-Based
 - ADFS 2.0
 - Office365
 - Office365 by Prompt
 - Use default credentials: select this option to choose default Windows credentials
 - Use the following credentials: select this option to enter user-specific credentials and enter the following information:
 - Username
 - Password
 - Domain
- 4. Click **OK**. The site displays in the list. You can expand the site to see the subfolders:



After adding your sites, you need to determine which libraries/folders are going to be upload-only or offline locations. For more information, see Setting Folders as Upload-only or Offline.

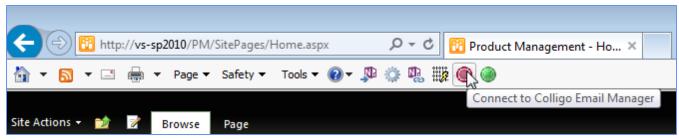
Using the Connect to Colligo Email Manager Button in Internet Explorer

You can add a SharePoint site or library to Colligo Email Manager directly from Internet Explorer using the **Connect to Colligo Email Manager** button.

To add a site with the Connect to Colligo Email Manager button:

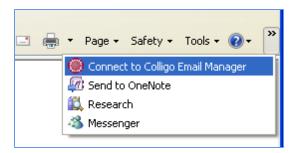
 Navigate to the SharePoint site or library that you want to add to Colligo Email Manager and click the Connect to Colligo Email Manager button:

Internet Explorer 9:



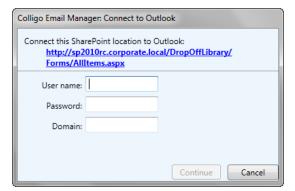
NOTE: If the **Connect to Colligo Email Manager** button is not visible, you need to enable the Command bar.

Internet Explorer 8:



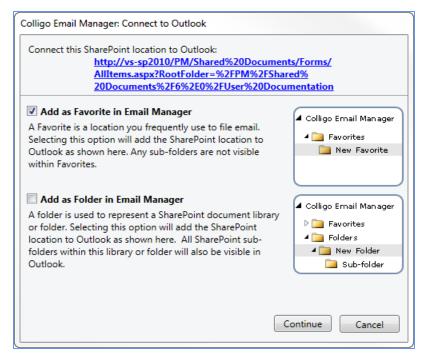
2. If you are logged in with your default credentials, you are not prompted for a username and password.

If not, you are prompted for your login credentials with the **Connect to Outlook** screen:



3. Enter your login information and click **Continue**.

The following screen displays.



4. Check the **Add as Favorite in Email Manager** box to add the location to your Favorites list. If you are adding a site-level location, the option to add it as a Favorite does not display.

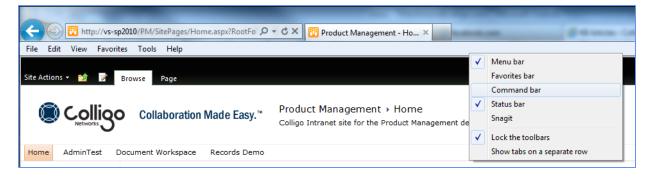
5. Check the Add as Folder in Email Manager box to add the location to your Folders list. When the connection is complete, the site or library now displays in your SharePoint Sites list and, depending on which boxes you checked, your Folders and/or Favorites list in Colligo Email Manager.

Enabling the Command Bar in IE 9

In Internet Explorer 9, the Command bar is disabled by default. To see the **Connect to Colligo Email Manager** button, the Command bar must be enabled and visible.

To enable the Command bar:

1. Right-click in the white space at the top of your browser window:



2. Select the **Command bar** option.

The Command bar displays at the top of your browser.

Removing a Site

To remove a site from the Colligo Email Manager group:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the **SharePoint Sites** list, click the site you want to remove and click **Remove**.

A dialog asks for confirmation of the deletion.

NOTE: removing a site removes all search locations, favorites, folders, and history items referencing the site.

3. Click **OK** to continue with the removal, or **Cancel** to retain the site.

If you remove a site, any offline content that has not been synchronized is deleted. To recover any of this content, please contact your administrator.

NOTE: Any sites that you remove from Email Manager are also removed from Colligo Briefcase.

Editing a Site

To edit a site in the Colligo Email Manager group:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the **SharePoint Sites** list, click the site you want to edit and click **Edit**.

The Edit SharePoint Site dialog displays.

- 3. Edit the fields as necessary. See Adding a SharePoint Site in Email Manager for a description of the fields.
- 4. Click **OK**.

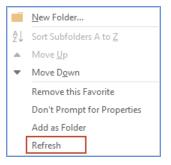
NOTE: If you make edits to a site in Email Manager the same edits are also applied to Colligo Briefcase.

Refreshing a Site

To refresh a site in the Colligo Email Manager list:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. Click on the site you want to refresh and click the **Refresh** icon:

NOTE: you can also refresh a folder by right-clicking on a folder under either your Folder list or Favorites list in Outlook and selecting **Refresh** from the contextual menu



CONFIGURING LOCATIONS FOR EMAIL FILING

After you have added your sites, you now need to determine which folder locations are upload-only or offline. You can also set them as Folders and Favorites.

Setting Folders as Upload-only or Offline

You have the option to set your libraries/folders as either upload-only or offline. If you set a library/folder as upload-only, the contents of those locations are only available to you when you are connected to your SharePoint server. If you are not connected, the content is not available to you for viewing or editing.

If you set a library/folder as offline, the folder structure and the content of the offline location is downloaded to your machine for offline viewing and editing purposes. The contents of those locations are downloaded to your local machine and you are able to access the content at any time, regardless of whether you are connected to your SharePoint server or not.

If you do not set a library/folder as either an upload-only location or offline location, you will not be able to file any emails, attachments, and other content from Email Manager to SharePoint.

These settings are applied at the folder level; you cannot apply this setting to an entire site or sub-site.

NOTE: your administrator may have disabled the option to set a folder as offline. If this is the case, the option is greyed out.

Setting a Location as Upload-only

Any location set as upload-only is marked with the following icon:

All subfolders within an upload-only location are also set as upload-only.

Use one of the following three methods to set a folder location as upload-only:

- 1. Select a site to display any sub-sites or document libraries.
- Double-click the library/folder you want to set as upload-only. The folder structure of the location downloads.

OR

- 1. Select a site to display any sub-sites or document libraries.
- 2. Right-click the library/folder you want to set as upload-only and select the **Set as upload-only** option from the menu.

The folder structure of the location downloads.

OR

- 1. Select a site to display any sub-sites or document libraries.
- 2. Select the library/folder you want to set as upload-only.
- 3. Click the Sync Settings icon and select **Set as upload-only**:

🔘 Colligo Email Manager Configurat	ion	x
SharePoint Sites	强 SharePoint Sites	
Favorites	🔀 Add 🖽 Remove 😳 Edit 🔯 🗢 🚖 🛅 🔎	
Folders	Colligo Portal Set as upload-only	
Search Locations	Finance Set as offline Shared Documents	
Search Options	Image: Site Assets	
Launchpad	 BDemo P Product Management 	
Settings		

Setting a Location as Offline

After you set a library/folder location as upload-only, you can choose to make it an offline location if you want the content in that location to be downloaded to your machine for offline editing and viewing purposes.

NOTE: your administrator may have disabled the option to set a folder as offline. If this is the case, the option is greyed out.

Any location set as offline is marked with the following icon: All subfolders within an offline location are also set as offline.

Use one of the following two methods to set a folder location as offline:

- 1. Select a site to display any sub-sites or document libraries.
- 2. Right-click the library/folder you want to set as offline and select the **Set as offline** option from the menu.

OR

- 1. Select a site to display any sub-sites or document libraries.
- 2. Select the library/folder you want to set as offline.
- 3. Click the Sync Settings icon and select **Set as offline**:

SharePoint Sites	🔛 🔛 SharePoint Sites
Favorites	🔀 Add 🖽 Remove 🖽 Edit 🖾 💭 😭 🗀 🔎
Folders	Colligo Portal Set as upload-only
Search Locations	Finance Set as offline Set as offline
Search Options	 Site Assets
Launchpad	 BDemo IBDemo Product Management
Settings	

Making a SharePoint Location a Folder or Favorite

After you have set your folder locations as upload-only or offline (see **Setting Folders as Upload-only or Offline**), you can then add your most frequently used SharePoint folder locations to either the Favorites or Folders group in your Colligo Email Manager group in your Outlook Folder Tree. If you have not set a folder location as either upload-only or offline, making it a Favorite or Folder automatically sets the location as upload-only .

The purpose of setting a location as a Folder or Favorite is to provide a shortcut in your Outlook Folder tree to that location. Then you can easily drag-and-drop emails, attachments, and other items into these locations from within Outlook.

When you mark a SharePoint location as a Favorite, it is a link to that location only; if there are any subfolders underneath that folder, you cannot navigate to them in the list. If you want to add a top-level folder and its subfolder, you need to add them separately.

When you mark a SharePoint location as a Folder, you are adding the folder and any subfolders it contains. If you want to move or copy an email to a folder in your Folders list, you can navigate through the subfolders to the location where you want to file your email. This differs from locations in your Favorites list, which do not include the folder hierarchy.

Adding a Location as a Favorite

You can add a SharePoint location to your Favorites list in one of two ways:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the **SharePoint Sites** list, select the site and the folder within the site that you want to add to your Favorites or Folders list and click the **Add Favorite** icon:
- 3. If the location is not already set as upload-only or offline, it automatically synchronizes and becomes an upload-only location.

The folder displays with the chosen icon beside it:

Colligo Email Manager Configuration		
SharePoint Sites	🔛 SharePoint Sites	
Favorites	🔀 Add 🔀 Remove 😳 Edit 🛅 💭 😭 🖿 🔎	
Folders	ttp://portal.colligo.com/	
Search Locations	P P Finance Human Resources	
Search Options	Information Systems	
Launchpad	▷ Interpretended Reports Interpretended Reports Interpretended Reports	
Settings	 ▶ ■ Shared Documents ☆ ▶ ■ Site Assets 	
	▶ 🔄 Site Pages ▶ 🔄 Style Library	

NOTE: if a sync is in progress, you can close the Configuration window without cancelling the sync.

OR

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Favorites**. The **Favorites** dialog displays:

🔘 Colligo Email Manager Configurati	on X	
SharePoint Sites	눚 Favorites	
Favorites	📩 Add 🌟 Remove 📃 Prompt	
Folders	Add Favorite	٦
Search Locations		
Search Options		
Launchpad		
Settings		
	Close	

3. Click the **Add Favorite** link or the **Add** icon The **Add Favorite** dialog displays.

Add Favorite	x
0	
▶ 🛐 Home	
Selected location:	
	OK Cancel

Browse to the location of the folder you want to add to your Favorites list, and click OK.
 NOTE: if you right-click Favorites under the Colligo Email Manager list, you can select Add Favorite from the contextual menu and the above dialog displays.

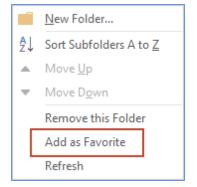
Any folders added display under **Favorites** in the Colligo Email Manager list:

 Colligo Email Manager Deleted Items
🕘 Browser
🔺 🚖 Favorites
Mac (vs-sp2010.corporate.local > PM > Shared Documents
Shared Documents (portal.colligo.com)
🕞 Shared Documents (vs-sp2010.corporate.local > PM)
D 🛅 Folders
Recovered Items
🗔 Search Folders

You can now use the folders to view, upload, and download your SharePoint files. Click on a folder to view its contents:

▲ Favorites <	http://vs-dev-s		/JB Matters/Forms/AllItems.aspx					
🔁 Inbox			prary Tools					
🔁 Sent Items	Site Actions 👻 📷 Brow						Tessa MacKinnon 👻	
Deleted Items (222)	Site Actions - 🕎 Brow	/se Docum	ents Library					
Colligo Email Manager	18Demo NIB	Matters (All Documents -				i 🖓 🖓	Â
		, matters					I Like It Tags &	
Deleted Items							Notes	-
🕘 Browser 🗏	JBDemo					Search this site	P 😮	1
✓ ★ Favorites → JB Matters (vs-dev-sp2010 > JBDemo)	Libraries	🔲 Туре	Name	Modified	Modified By	People or Group	s Managed Metad	5
Mac (vs-sp2010.corporate.local > PM > 1	Matters		Hewitt v Anderson	14.12.2011 14:18	Tessa MacKinn	on		
🔯 Shared Documents (portal.colligo.com)	JB Matters		Hilton v Marriott	26.10.2011 12:20	Trevor Dyck			
🕞 Shared Documents (vs-dev-sp2010 > JBI	Order Forms							
🖙 Shared Documents (vs-sp2010.corporate			Jones v Morgan	14.12.2011 14:18	Tessa MacKinn	on		
4 🔁 Folders	Lists		Pepsi v Coke	26.10.2011 12:21	Trevor Dyck			
D P Product Management (vs-sp2010.corpor	Calendar		Smith v Brown	14.12.2011 14:17	Tessa MacKinn	on		
Briefings	New Orders		Andrew Block 23Jan09	17.05.2012 14:01	Tessa MacKinn	on		-
Photos	New Orders		17.55.13_RE MSGMigrate					
SPC 2011 Presentations			Utility 3.2.19					4
Recovered Items	Discussions		Colligo Marketing_06Jun12 06.58.29 Webinar	17.07.2012 10:59	Tessa MacKinn	on		
📮 Search Folders 👻	Team Discussion		tomorrow SharePoint BYOD Survey Results					
Mail					Tessa MacKinn			
	A Recycle Bin		Colligo Marketing_12Jun12 13.25.27_June 14 webinar	14.06.2012 11:58	Tessa Mackinn	on	777 Arncote Av	e
Calendar	All Site Content		SharePoint on the iPad					
S Contacts			Colligo Networks_11Dec12	08.01.2013 16:44	Tessa MacKinn	on		
a Contacts			01.20.48_Win a pass to the European SharePoint					
💙 Tasks			Conference					
			Dave Mackay 12Mar08	22.08.2012 10:28	Tessa MacKinn	nn		-
🔍 🖬 🖉 👻	•						•	

NOTE: you can also add a folder to your Favorites list by right-clicking on a folder under the Folders list and selecting **Add as Favorite** from the contextual menu:



Prompting for Properties

For locations that you have added as Favorites, you have the option to turn the prompt for the **Edit Properties** dialog on or off:

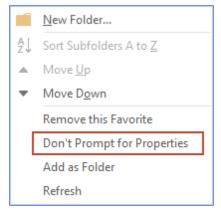
O Edit Properties		x
Options		
Content Type:	Document 👻	
Properties		
Name	e Value	*
± Name	Colligo Networks_01Jun11 06.40.46_Webinar Tc .msg	
Title	Webinar Tomorrow: Unleashing SharePoint 2010 for R	E
То	Dave Mackay	
From	Colligo Networks	_
Subject	Webinar Tomorrow: Unleashing SharePoint 2010 for R	_
Bcc		_
Cc		_
EmIDate	Select a date	*
	OK	el

This prompt is enabled by default. You can turn it on or off in one of two ways:

 In the Favorites tab, select the location you want to disable the property prompt for, and click the Prompt icon:

OR

• In the Favorites group in the Outlook folder tree, right-click a location and select either **Don't Prompt for Properties** or **Prompt for Properties** from the contextual menu:



Removing a Location from the Favorites List

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Favorites**. The **Favorites** dialog displays.
- 3. Select the folder you want to remove and click Remove.

The folder is removed from your Favorites list and from the Colligo Email Manager section in your Outlook Task Pane. However, the SharePoint location itself still remains marked as an upload-only location.

NOTE: you can also remove a Folder from your Favorites list by right-clicking the Folder in your Favourites list in Outlook and selecting **Remove this Favorite** from the contextual menu:

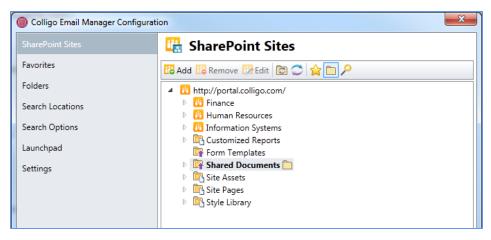
	<u>N</u> ew Folder					
₽↓	Sort Subfolders A to <u>Z</u>					
	Move <u>U</u> p					
-	Move D <u>o</u> wn					
	Remove this Favorite					
	Don't Prompt for Properties					
	Add as Folder					

Adding a Location as a Folder

You can add a folder to your Folders list in one of two ways:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the **SharePoint Sites** list, select the site and the folder within the site that you want to add to your Folders list and click the **Add Folder** icon:
- 3. If the location is not already set as upload-only or offline, it automatically synchronizes and becomes an upload-only location.

The folder displays with the folder icon beside it:



NOTE: if a sync is in progress, you can close the Configuration window without cancelling the sync.

OR

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Folders**. The **Folders** dialog displays:

🔘 Colligo Email Manager C	onfiguration
SharePoint Sites	E Folders
Favorites	Remove
Folders	Add Folder
Search Locations	
Search Options	
Launchpad	
Settings	
	Close

3. Click the **Add Folder** link or the **Add** icon. The **Add Folder** dialog displays:

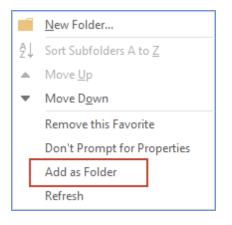
Add Folder	×
0	
🖻 🔯 Home	
Selected location: Home	
	OK Cancel

NOTE: if you right-click **Folders** under the Colligo Email Manager list in Outlook, you can select **Add Folder** from the contextual menu and the above **Add Folder** dialog displays.

4. Browse to the folder you want to add to your Folders list and click **OK**. Any folders added display under **Folders** in the Colligo Email Manager list:



NOTE: you can also add a Folder by right-clicking on a folder under your Favorites list and selecting Add as Folder from the contextual menu:



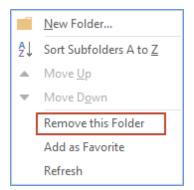
NOTE: as a best practice, it is recommended that you do not add folders with more than 50 subfolders to your Folders list, as they will take a long time to populate and refresh. If there is a top-level folder that has a number of subfolders to which you frequently file emails, it is recommended that you use the **Move** or **Copy** buttons and browse to the SharePoint location, rather than using the Folders list in your Outlook pane.

Removing a Location from Folders List

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Folders**.
- 3. Select the folder you want to remove and click Remove.

The folder is removed from your Folders list and from the Colligo Email Manager section in your Outlook Task Pane. However, the SharePoint location itself still remains marked as an upload-only location.

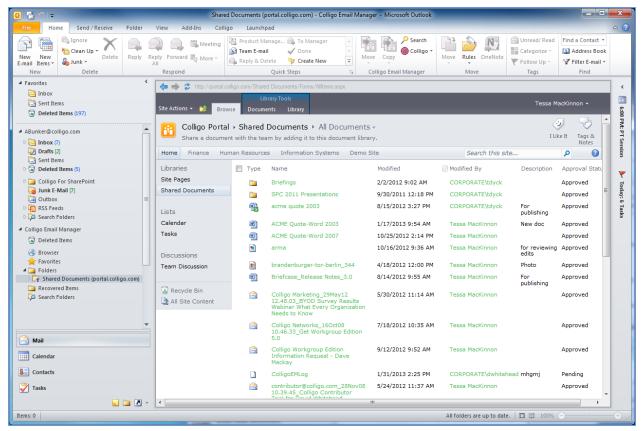
NOTE: you can also remove a folder by right-clicking on a folder under the Folder list in Outlook and selecting **Remove this Folder** from the contextual menu:



Viewing Upload-only Locations

Once your SharePoint locations have been set as either a Favorite or Folder, you can select the location in the folder tree to display the content.

If you have set a location as upload-only, the content of the SharePoint location displays in the Outlook interface as follows:



NOTE: for upload-only locations, you cannot view any content when you are offline.

If a location is set as upload-only, the SharePoint content that displays looks exactly like the content would in an Internet browser window. You can browse through the site and use typical SharePoint functionality like opening a document in a program, checking an item in or out, renaming, or deleting an

item. Any changes you make to an item are reflected immediately in the SharePoint site so other users can see them.

For more information, see Editing Content in Email Manager

Viewing Offline Locations

Once your SharePoint locations have been set as either a Favorite or Folder, you can select the location in the folder tree to display the content.

If you have set a location as offline, the content of the SharePoint location displays in the Outlook interface as follows:

File Home Send / Receive Folder		View Add-Ins Collig		lligo Email Manager - Mio					
New New mail Items* New	Rep	ly Forward More -	 Product Manage ∧ To Manager Team E-mail Quick Steps 		arch Move * Iligo * Pules * M OneNote ger Move	Unread/ Read Categorize * Follow Up * Tags	Find a Contact 👻		
Favorites Inbox Sont Items Deleted Items (197)	<	Colligo Portal > Shared Docu Shared Docume Share a document with the to New • Upload • Filter •	nts	ument library.		Vie	w: All Documents	-	
ABunker@colligo.com		Name	Modified	Modified By	Description	Approval Status		_	
 Abdriker@conigo.com Inbox (6) Drafts [2] 		Briefings SPC 2011 Presentations	2/2/2012 9:02 AM 9/30/2011 12:18 PM	CORPORATE\tdyck CORPORATE\tdyck		Approved Approved		Â]
 Sent Items Deleted Items (5) 	=	ACME Quote-Word 2003		CORPORATE\tdyck Tessa MacKinnon Tessa MacKinnon	For publishing New doc	Approved Approved Approved			
Colligo For SharePoint Junk E-Mail [7] Image: Collign of the state of		arma.png	10/16/2012 9:36 AM	Tessa MacKinnon Tessa MacKinnon	for reviewing edits Photo	Approved Approved			
RSS Feeds Folders		 Briefcase_Release Notes Colligo Marketing_29May Colligo Networks_16Oct0. 	. 5/30/2012 11:14 AM	Tessa MacKinnon Tessa MacKinnon Tessa MacKinnon	For publishing	Approved Approved Approved		=	
Colligo Email Manager		Colligo Workgroup Edition.		Tessa MacKinnon CORPORATE\dwhitehead	mhgmj	Approved Pending			
 Browser Favorites 		contributor@colligo.com_, Crossing the Chasm to Hi.	9/26/2012 12:16 PM	Tessa MacKinnon Tessa MacKinnon		Approved Approved			
 Folders Shared Documents (portal.colligo.com) (Recovered Items 		Excel file.xlsx	8/22/2012 10:58 AM 8/22/2012 3:35 PM 8/22/2012 11:02 AM	Tessa MacKinnon Tessa MacKinnon Tessa MacKinnon	Helen's desk	Approved Approved Approved			
🖻 e i e i e i e i e i e i e i e i e i e		E laptop image.jpg	8/13/2012 4:21 PM	Tessa MacKinnon Tessa MacKinnon		Approved Approved			
Calendar		NAICS.csv		Tessa MacKinnon Tessa MacKinnon	For publishing	Approved Approved			
Sea Contacts		Office 2010.doc Confice 2010Benefits.pdf	8/20/2012 2:28 PM 8/20/2012 4:10 PM 8/13/2012 1:57 PM	Tessa MacKinnon Tessa MacKinnon Tessa MacKinnon	Tessam Office 2010 for publish Tessa janem	Approved ng Approved Approved			
	•	photo within a photo.jpg	8/23/2012 1:37 PM 8/23/2012 3:38 PM 10/19/2012 11:33 AM	Tessa MacKinnon Tessa MacKinnon	read janen	Approved Approved		-	

If a location is set as offline, you can open, view, and edit the content as you would if the content was online. The difference is that any changes you make are not reflected in the SharePoint site itself until you are connected to the SharePoint server again, and you synchronize the site.

For more information, see Editing Content in Email Manager

Viewing Item Version History

If a library has versioning enabled, you can view an item's version history by choosing the **Version History** option in the right-click contextual menu:

Name		Modified	Mod	ified By	Author	Related Company	Person/Group	Prod
🔁 FireStarter Pro Range data:	shee	3/5/2014 4:02 PM	Dav	id Jackson				Pro
FireStarter Racer Rar	Edit <u>P</u> ro	operties		id Jackson			Jerry McKenzie	Extr
<u>لم</u>	Open v	with Adobe Reader						
	Сору							
	Paste							
La la	Check	Ou <u>t</u>						
S	Versior	History						
	Send A	s Link						
	Send A	s Attachment						
<u>ی</u>	Copy S	harePoint URL						
۶.	Copy S	harePoint Doc ID URL						
	<u>R</u> enam	e						
×	<u>D</u> elete							
	Create	Shortcut						
•								- F

NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.

The **Version History** window displays:

No	Modified	Modified By	Size	Comments	
8.10	6/19/2013 9:34:00 AM	Bernard Cheng	160		
8.9	6/19/2013 9:33:00 AM	Bernard Cheng	153		
8.8	6/19/2013 9:30:00 AM	Bernard Cheng	157		
8.7	6/19/2013 9:30:00 AM	Bernard Cheng	145		
8.6	6/19/2013 9:30:00 AM	Bernard Cheng	188		=
8.5	6/19/2013 9:25:00 AM	Bernard Cheng	176		
8.4	2/12/2013 11:36:00 AM	Bernard Cheng	145		
8.3	2/12/2013 9:35:00 AM	Bernard Cheng	138		
8.2	2/12/2013 9:27:00 AM	Bernard Cheng	124		
8.1	2/12/2013 9:26:00 AM	Bernard Cheng	123		
8.0	2/8/2013 3:23:00 PM	Steve Beishuizen	103		
7.0	2/8/2013 3:20:00 PM	Steve Beishuizen	69		Ŧ
				Clos	

Click on a version number to open the SharePoint version of the item.

EDITING CONTENT IN EMAIL MANAGER

The actions available to you for editing content in Email Manager depend on if the SharePoint location has been set to upload-only or offline.

Editing Content in Upload-only Locations

The actions available for items that are in upload-only locations are displayed in the drop-down menu for each item:

Site Actions - 🐋 Brow	rse Docume	nary Tools ents Library Documents ► All Documents ~		_	_	
		im by adding it to this document library.				
Home Finance Hun	nan Resource	s Information Systems Demo Site				
Libraries	🔲 Туре	Name			Modified	Mod
Site Pages	P	Briefings			2/2/2012 9:02 AM	COR
Shared Documents		SPC 2011 Presentations			9/30/2011 12:18 PM	COR
		acme quote 2003			8/15/2012 3:27 PM	COR
Lists Calendar		ACME Quote-Word 2003			▼ 1/17/2013 9:54 AM	Tess
Tasks	(ACME Quote-Word 2007		View Properties	L0/25/2012 2:14 PM	Tess
10010		arma	Ð	Edit Properties	10/16/2012 9:36 AM	Tess
Discussions		brandenburger-tor-berlin_344		View in Browser	4/18/2012 12:00 PM	Tess
Team Discussion	(11)	Briefcase_Release Notes_3.0	1	Edit in Microsoft Word	B/14/2012 9:55 AM	Tess
A		Colligo Marketing_29May12 12.48.03_BYOD Survey Results V Organization Needs to Know		Check Out Unpublish this version	5/30/2012 11:14 AM	Tess
Recycle Bin		Colligo Networks_16Oct08 10.46.33_Get Workgroup Edition 5	N	Version History	7/18/2012 10:35 AM	Tess
All Site Content		Colligo Workgroup Edition Information Request - Dave Macka		Compliance Details	9/12/2012 9:52 AM	Tess
		ColligoEMLog		Alert Me	L/31/2013 2:25 PM	COR
		contributor@colligo.com_28Nov08 10.39.45_Colligo Contribut		Send To	5/24/2012 11:37 AM	Tess
	(11)	Crossing the Chasm to High User Engagement	<i>🖗</i>	Manage Permissions	9/26/2012 12:16 PM	Tess
	F	desk	X	Delete	8/22/2012 10:58 AM	Tess

Editing Content in Offline Locations

In offline locations, the actions available are more limited than upload-only locations. These actions are displayed in the right-click menu for each item:

Name		Modified	Modified By	Author	Related Company	Person/Group	Prod
🔁 FireStarter Pr	ro Range datashee	3/5/2014 4:02 PM	David Jackson				Pro
FireStarter D	seer Danao datach	1/6/2014 10:44 AM	David Jackson			Jerry McKenzie	Extr
	Edit Properties						
Open with Adobe Reade		eader					
	Сору						
	Paste						
Check Out							
•	Version History						
	Send As Link						
	Send As Attachmen	t					
<u>ی</u>	Copy SharePoint UF	ય. 📗					
9.	Copy SharePoint Do	oc ID URL					
	<u>R</u> ename						
×	Delete						
	Create Shortcut						

MOVING OR COPYING EMAILS

You can move or copy email to a SharePoint location in four ways:

- 1. Dragging-and-dropping emails.
- 2. Using the Move and Copy buttons in the Colligo Email Manager group.
- 3. Using contextual menu options.
- 4. Using Send-and-File.

If you choose to move an email, there is no longer a copy of it in your Outlook account. If you choose to copy an email, a copy is retained in your Outlook account. This behavior is determined in your settings dialog; see Managing Settings.

The experience of filing items to SharePoint in Email Manager is the same regardless of whether you are connected to your SharePoint server.

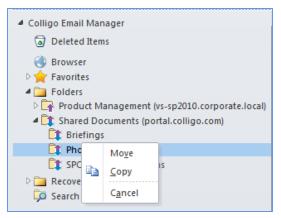
When you are connected to the network, any items are uploaded to SharePoint immediately, unless you have modified the sync options. When you are offline, new or modified items are uploaded to SharePoint according to your Sync Options settings. See **Synchronizing Content in Email Manager**.

NOTE: Uploading items to SharePoint will not block you from using other Outlook functions.

Dragging and Dropping Email

When you drag-and-drop an email to a SharePoint folder, the default behavior is to create a copy of the email in that location while retaining the original in your Outlook account. You can change this behavior in the **Settings** dialog. See <u>Managing Settings</u>.

If your default behavior is set to **Move**, you have the option of doing a right-click drag-and-drop that displays the following dialog, giving you the option to **Copy**:



NOTE: if you have a folder in your Folders list that has numerous subfolders that you have to scroll through to find the folder to drag-and-drop your email into, it is easier to use the **Move/Copy** buttons and use the filter feature to isolate the folder; see **Using the Move and Copy Buttons**.

To drag-and-drop an email to a SharePoint folder:

- 1. Select the email you want to move to a SharePoint location.
- 2. Click and drag the selected email to a folder in your Favorites or Folders list.

The Edit Properties dialog displays:

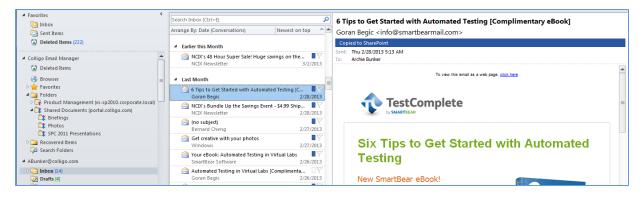
C Edit Properties								
Options								
Content Type: Document *								
Properties								
Name	Value							
* Name	Colligo Networks_01Jun11 06.40.46_Webinar Tc .msg							
Title	Webinar Tomorrow: Unleashing SharePoint 2010 for R							
То	Dave Mackay							
From	Colligo Networks							
Subject	Webinar Tomorrow: Unleashing SharePoint 2010 for R							
Всс								
Cc								
EmIDate	Select a date	*						
	OK Can	cel						

- 3. In the **Options** section, choose the **Content Type** from the drop-down menu.
- 4. In the **Properties** section, modify the fields as preferred.

The property fields are inherited from the SharePoint library you are moving your email into. Most SharePoint 2010 metadata is supported, including Enterprise Managed Metadata (taxonomies, keywords). Email properties such as To, From, and Subject are automatically extracted. The **Title** field auto-populates with the **Subject** of the email.

5. Click **OK** to complete the process.

NOTE: If you have enabled the **Copied to SharePoint** setting, the marker displays in the header of the email and in the list view:

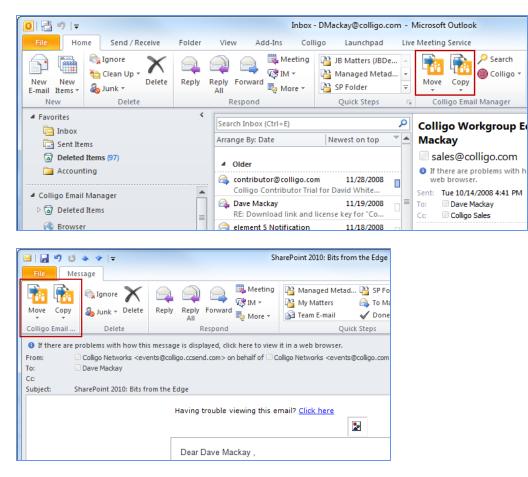


To enable or disable this setting, see Managing Settings.

Using the Move and Copy Buttons

To move or copy an email to a SharePoint folder:

1. In Outlook, select the email you want to move or copy, or double-click it to display it in its own window. The **Move** and **Copy** buttons display in both views:



2. From the drop-down menu, choose the folder you want to move your email to:



3. If the folder you want is not in your **Favorites** or **History** list, select **Other SharePoint Locations**. The **Select Move/Copy Destination** dialog displays:

(Select Move Destination	J
	🗒 Add 📖 Remove 📅 Edit 🚖 🚞 🔎 💭	
	🖻 🚹 Home	
9	Selected location:	
	OK Cancel	

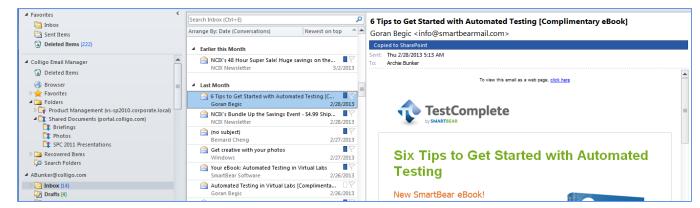
NOTE: When you are offline, locations that are not set to upload-only are greyed out. If you want to be able to file items to specific locations when offline, ensure that you set them as upload-only prior to going offline.

4. Browse to the location of the folder or list you want to copy the email to.

NOTE: If you are filing to a location that has not been set as upload-only, you can set it by double clicking it. You cannot do this when you are offline.

- 5. Click OK. The Edit Properties dialog displays.
- 6. Choose your **Content Type** and enter the **Properties** as needed.
- 7. Click **OK** to complete the process.

NOTE: If you have enabled the Copied to SharePoint setting, the marker displays in the header of the email and in the list view:



To enable or disable this setting, see Managing Settings.

Using Contextual Menu Options

To file emails to SharePoint using the contextual menu options:

1. Right-click an email and select **Copy to SharePoint** or **Move to SharePoint** from the contextual menu:

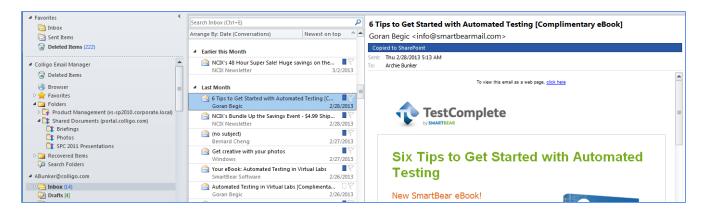
0 ≓ " -		Inbox	- DMackay@colligo.com - Microsoft Out
File Home Send / Receive Folder	View Add-Ins Coll		e Meeting Service
New New E-mail Items * New Delete	Reply Forward Respond		Move to: ?
▲ Favorites			
🖂 Inbox	Search Inbox (Ctrl+E)	٩	BYOD Survey Results Webin
🔁 Sent Items	Arrange By: Date	Newest on top 🖉 📥	Colligo Marketing
Deleted Items (222)	▲ Yesterday		Sent: Tue 5/29/2012 12:48 PM To: Dave Mackay
Colligo Email Manager	🖂 Colligo Marketing 🛛	Tue 1:40 PM]
Deleted Items	5	<u>≧</u> ору	
	4 Older	🖁 Quick Print	
 Browser Favorites 	[6	🔈 <u>R</u> eply	
Mac (vs-sp2010.corporate.local > PM > 1	Colligo Contributor@colligo.	👔 Reply <u>A</u> ll	
Shared Documents (portal.colligo.com)	-	Eor <u>w</u> ard	
🖙 Shared Documents (vs-sp2010.corporate	DE Develop d link og		BYOD and
Folders	📄 element 5 Notificatior		What
Product Management (vs-sp2010.corpor	Download link and li	Ca <u>t</u> egorize ►	vvnati
Shared Documents (portal.colligo.com)	📄 element 5 Notification	Follow Up ▶	
Briefings Photos		<u>F</u> ind Related	
SPC 2011 Presentations	Dotfuscator-registrati		BYOD and SharePoint Survey
Recovered Items		Bules	Needs to Know
Search Folders		<u>Move</u> ►	Thursday, June 7
▲ ABunker@colligo.com		Copy to SharePoint	Favorites
▷ 🖂 Inbox (14)	Colligo Contributor T	Move to SharePoint	Colligo
Drafts [4]	🗧 🖂 contributor@colligo.		
Sent Items	1	M One <u>N</u> ote	History
Deleted Items (63)	Colligo Workgroup E	j Ignore	Home
Colligo For SharePoint		🗞 Junk 🕨 🕨	Conter SharePoint Locations
Conversation History		X Delete	Today's mobile devices are indispen
📴 Drafts	ave Mackay	3/12/2008	(BYOD) trend has also created challe
🐻 Junk E-mail [3271]	RE: Screenshots	0	

2. Choose a location from your **Favorites** or **History**, or choose **Other SharePoint Locations** to browse to any location in any of your sites.

The **Edit Properties** dialog displays.

- 3. Choose your **Content Type** and enter the **Properties** as needed.
- 4. Click **OK** to complete the process.

NOTE: If you have enabled the **Copied to SharePoint** setting, the marker displays in the header of the email and in the list view:



Moving or Copying Multiple Emails

To move or copy multiple emails:

- 1. Select your emails in Outlook (use **Ctrl + click** to select more than one email).
- 2. In Outlook 2010 or 2013, click either the **Move** or **Copy** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Move to SharePoint** or **Copy to SharePoint** button in the **Colligo Email Manager** toolbar.
- 3. Select the folder location that you are moving or copying the emails to.

The **Edit Properties** dialog displays:

🔋 Edit Properties 📃 📼 💻			
FW: Get More for Less			
🖼 SharePoint 2010 Webii			
	Properties		
	Name	Value	
	* Name	Bob Barker_01Feb11 14.20.15_FW Get More for .msg	
	Title	FW: Get More for Less with Patch Plus Antivirus	
	L		
× >		OK Cancel	

4. In the left pane, select the email and edit the **Content Type** and **Properties** as needed.

See Using Managed Metadata for information about metadata fields.

See <u>Applying Metadata to Multiple Emails</u> for information about applying metadata to multiple items.

5. When metadata for all emails is complete, click **OK**.

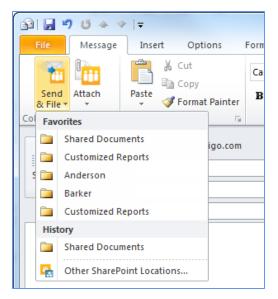
The emails are moved or copied to the selected folder.

Sending and Filing Emails

When you are sending an email, you can choose the send-and-file option so the email is saved to a SharePoint site at the same time as being sent to the recipient.

1. When your email is complete and ready to send, click the **Send & File** button that displays in the **Message** ribbon of a new email message.

A list of your SharePoint Favorites and your most recently used SharePoint folders (History) displays:



2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

The Edit Properties dialog displays.

3. Edit the **Content Type** and any **Metadata** fields as preferred.

See Using Managed Metadata for information about metadata fields.

4. Click **OK** to both send the email and file it to SharePoint.

NOTE: You can determine whether or not this action means that the email is copied or moved to the SharePoint site by changing the Colligo Email Manager settings. See <u>Managing Settings</u>.

Applying Metadata to Multiple Emails

You can apply the same metadata properties to multiple emails. However, the properties that are available for group edit are the ones that are common to all selected upload items. Therefore, items that are based on the same content type will have more common properties available for group edit than a group of items that are based on different content types.

To apply the same metadata to multiple emails:

- 1. Select your emails in Outlook (use **Ctrl + click** to select more than one email).
- In Outlook 2010, click either the Move or Copy button in the Colligo Email Manager group on the Home tab; in Outlook 2007, click the Move to SharePoint or Copy to SharePoint button in the Colligo Email Manager toolbar.
- 3. Select the folder location that you are moving or copying the emails to.

The Edit Properties dialog displays:

Edit Properties					
FW: Get More for Less	Group Edit: Enter property values to apply to the 2 selected upload items.				
·	Options				
	Content Type: Document				
	Properties				
	Name	Value			
	Title	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>			
	column	(2)			
		Value specified here will apply to all selected items.			
	customprop	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>			
	Enterprise Keywords				
		Value specified here will apply to all selected items.			
· · · ·		OK Cancel			

4. Press the **Ctrl** key and click to select the emails in the left column that you want to apply the same metadata to.

The metadata properties that are common to all selected items display. All metadata you enter is applied to all selected emails:

NOTE: See Using Managed Metadata for information about metadata fields.

- 5. Edit the **Content Type** and **Properties** as needed.
- 6. When metadata for all emails is complete, click **OK**.

The emails are moved or copied to the selected folder.

Using Managed Metadata

Managed metadata is a set of hierarchical terms that you can use to classify items in SharePoint. The terms are defined in the SharePoint site, and are available to you when you are filing emails.

To read more about managed metadata in SharePoint, please see:

http://technet.microsoft.com/en-us/library/ee424402.aspx

When you are entering metadata, you can use typeahead or select from the entire list of terms to make the process more efficient, and you can add your own terms to a set of metadata.

Using Typeahead

If you are typing in a field that has managed metadata, a drop-down list of options displays when you start typing the first few letters. You can then select from the list of options rather than typing in the rest

of the term.

O Edit Properties		x	
Options			
Content Type: Document			
Properties			
Name	Value	A	
Attachment			
Message Body	A V		
To-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS		
From-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS		
Cc-Address			
Bcc-Address			
Tags	p 🗘		
<u>[</u>	Public Relations [Keywords] OK Cance		

Selecting from a List of Metadata

1. To see the entire list of metadata available for a given field, click the silon to display a list of available terms to choose from.

The **Select term(s)** dialog displays:

O Select term(s)		x
 ▲ AssetID ▷ ▷ ⊘ Parks ⊘ Search using features ▷ ⊘ SWMP 		
Select		
ОК	Ca	ncel

2. You can double-click a term to add it to the list of selected terms, or you can select the term and click **Select**.

The terms you selected are now added to the related field.

3. Click **OK**.

Using Person or Group Metadata

You can assign person or group metadata when filing emails.

Depending on how your SharePoint document library was configured, you may have the following options to:

- enter multiple people and/or groups
- choose people only or people and groups
- choose from all users or a group

Validating a Person or Group Name

To validate a person or group name:

1. If you only know part of the name of a person or group, you can enter one or more letters in the

field and click the validation icon

The following error message displays:

Person Single	g	8./ 🗓
	No exact match was found. Click the item(s) that did not resolve for more	e options.

2. Click the item to display a drop-down menu of suggestions based on the letter(s) you entered:

Edit Properties			×
Options			
Content Type: Document	Ŧ		
Properties			
Name		Value	
* Name	Bob Barker_01Feb11 14.20.1	5_FW Get More for Less with Patch .msg	
Title	FW: Get More for Less with	Patch Plus Antivirus	
Person Single	e;	&_ 11	
	Suggestions	he item(s) that did not resolve for more options.	
Person and Group Si	B <mark>e</mark> n H <mark>e</mark> nd <mark>e</mark> rson	8 ₂ 10	Ξ
· · · · ·	Bill <mark>E</mark> ngland		- 1
Person Multi	Brad Wilde	&/ D	_
Person and Group M	Bra <mark>e</mark> den Calyniuk Brent Bolleman	S-/ 11	
Person Home Membe	CORPORAT <mark>E</mark> \ablock	8 ₁ 🔛	
* Person Required	CORPORAT <mark>E</mark> \abunk <mark>e</mark> r		
Group Within Group	CORPORAT <mark>E</mark> \ahoogensen	\$ ₁ 11	
	CORPORAT <mark>E</mark> \barryj CORPORAT <mark>E</mark> \bbarker		*
	None of the above		
	Remove	OK	cel
	More Names	29	25

3. Select an item from the list to enter in the field, or enter new search letters.

Searching for a Person or Group Name

To search for a person or group name:

1. Click the address book icon is to view the directory of your SharePoint people and groups. The **Search People** dialog displays:

0) Searcl	h People				x
	Find					~
		Display Name	Email	Account N	Vame	
		Type into t	the search box above then p start your search.	ress "Enter" to		
				OK	Car	ncel

- 2. Click the search icon *P* to display a complete list of all people and groups, or enter a name in the **Find** field and press **Enter** to search.
- 3. Select the person or group you want to add to the field and click **OK**.

Using BCS Metadata

Email Manager supports a type of column field in SharePoint called External Field, which is connected to a technology called BCS, or Business Connectivity Services. This means you can add metadata from alternate databases and taxonomies.

These fields display in the Edit Properties dialog in a similar way to Managed Metadata fields:

Edit Properties					
Options	Options				
Content Type: Document	Content Type: Document				
Properties					
Name	Value				
∗ Name	Bob Barker_31May12 16.03.53_RE BCS screensh .msg				
Title	RE: order form				
Medical Supplies	7				
	OK Cancel				

You can add an external item in one of two ways:

• Type an external item in the field and click the first icon 🛃 to check if it exists.

NOTE: you must type it exactly for it to be validated. For example, if you enter "tong" and the external item name is "tongs," you will receive an error message saying there is no match.

OR

• Click the second icon icon to display the **Choose List Item** dialog. Use the **Find** field to search for a term, or select an item and click **OK** to add it to the field:

Choose List Item			
Search Optic	ons		
Find:			2
Search Resu	lts		
ProductID	Name	Description	
1	Bandage	30 pieces	
2	Syringes	50mL, 50 units	
3	Gauze	1000 pieces	
4	Latex Gloves	100 pairs	
5	Foreceps	1 set	
6	Tongs	1 set	
7	Plastic Scissors	1 pair	
8	Catheter	1 unit	
9	Kidney Bowl	1 piece	
OK Cancel			

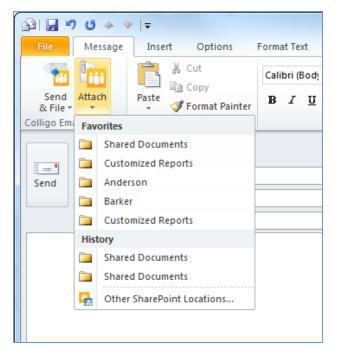
Managing Attachments in Emails

When you are sending an email, you have the option of inserting a link to a document location in SharePoint, or inserting a SharePoint item as an attachment.

NOTE: this feature is currently available only when you are connected to your SharePoint server.

1. When you want to attach a document or insert a link, click the **Attach** button that displays in the **Message** ribbon of a new email message.

A list of your SharePoint Favorites and your most recently used SharePoint folders (History) displays:



2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

The Insert Attachment From SharePoint dialog displays:

Insert Attachment From SharePoint		
History Favorites Folders Sites		2
D IB Matters	Arrange By: Date	Newest on top
D Shared Documents	▲ 2/14/2013	*
	🖂 Dave Mackay	E
	Dave Mackay_14Feb13 14.55.09.msg	
	▲ 12/11/2012	
	Colligo Networks	
	Colligo Networks_11Dec12 01.20.48_Win a pass to the European SharePoir	nt Conference.msg
		-
	<	•
	Insert Item Insert L	ink Cancel

3. You can find an item by accessing your **History**, **Favorite**, or **Folder** locations by clicking on the appropriate tab, or see all of your SharePoint locations on the **Sites** tab. You can also use the Search field to narrow the list.

NOTE: The number of items that display in the results pane when you select a folder location or when you use the search feature, are set in the **SharePoint Query Options** field in the **Search Options** tab (see Managing Search Options).

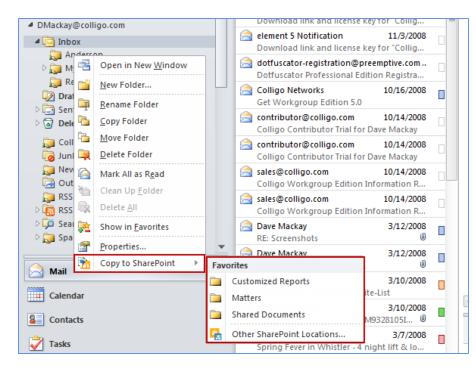
- 4. Browse through either the search results or your folders and subfolders until you find the item you are looking for. You can use the **Arrange By** toggle to arrange items by the **Date** the item was created or by who created the item (**From**).
- 5. Choose one of the following options:
 - a. Insert Item: choose this option if you want to insert the item as an attachment
 - b. **Insert Link**: choose this option if you want to insert a link to the item's location in Share-Point
- 6. Click Send or Send & File.

Copying an Outlook Folder to SharePoint

You can copy a folder from Outlook to a SharePoint location using Email Manager.

NOTE: you can only copy folders to SharePoint; moving a folder is not available.

1. Right-click on the folder you want to copy to SharePoint and select **Copy to SharePoint** from the contextual menu:



2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

The Edit Properties dialog displays:

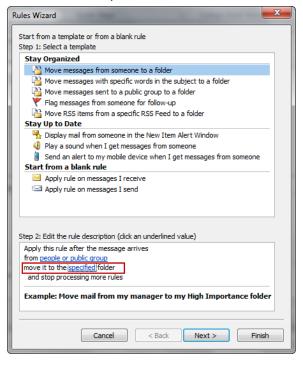
Edit Properties			
FW: Get More for Less	Group Edit: Enter property values to apply to the 2 selected upload items.		
	Options		
	Content Type: Document		
	Properties		
	Name	Value	
	Title	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>	
	column	\$\$	
		Value specified here will apply to all selected items.	
	customprop	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>	
	Enterprise Keywords		
		Value specified here will apply to all selected items.	
]	
		OK Cancel	

For information about applying metadata to multiple emails, see **Applying Metadata to Multiple Emails**.

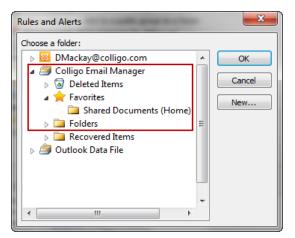
Using Outlook Rules to File Emails

To use an Outlook rule to file an email:

- 1. In Outlook, you can use the Rules Wizard to define the properties of the email that will be filed by the rule.
- 2. To choose the SharePoint folder you want to file the email in, click the **move it to the specified folder** link in Step 2 of the Rules Wizard:



The Rules and Alerts dialog displays:



- 3. Browse to your preferred SharePoint folder in the Colligo Email Manager group.
- 4. Click **OK**.
- 5. Edit the remaining elements of the rule description in the wizard and click Finish.

All emails that meet the criteria of the rule are filed to the SharePoint location you selected; however, the **Edit Properties** dialog displays so you can edit the metadata for each email.

Using Outlook Quick Steps to File Emails

To use Quick Steps to file emails:

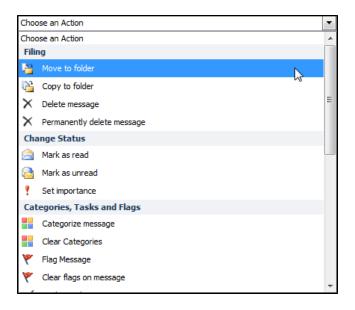
1. In the Quick Steps group on the Home ribbon, click **Create New**:

🗎 Shantel	🙈 To Manager	•
🚰 Team E-mail	🗹 Done	*
🙈 Reply & Delete	💱 Create New	-
Quick	G.	

The **Edit Quick Step** dialog displays:

dit Quick Step	? <mark> </mark>
	e: Quick Step
Add actions be	low that will be performed when this quick step is clicked on.
Choose an Ad	tion 💌 🗙
Add Action	
Optional	
Shortcut key: Tooltip text:	Choose a shortcut
	Finish Cancel

- 2. In the Name field, enter a name for the Quick Step.
- 3. Under the **Choose an Action** drop-down menu, in the **Filing** group, choose **Move to folder** or **Copy to folder** as preferred:



After you have chosen the Filing action, the **Choose folder** menu displays on the **Edit Quick Step** dialog.

4. Choose Other Folder from the drop-down menu.

The Select Folder dialog displays:

Select Folder	×
Folders:	OK Cancel New
4	

5. Choose a folder from the **Colligo Email Manager** group and click **OK**.

6. Click Finish.

You can file emails to the SharePoint location you chose by selecting an email in Outlook and clicking the Quick Step you created in the Quick Steps group.

The Edit Properties dialog displays so you can edit the metadata for each email.

MANAGING SETTINGS

To manage your settings:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the Colligo Email Manager Configuration dialog, select Settings.

The **Settings** dialog displays:

Colligo Email Manager Configuration					
SharePoint Sites	😃 Settings				
Favorites	History and Favorite Limits				
Folders	Number of History items:	10			
Search Locations					
Search Options	Number of Favorite items:	10			
Launchpad					
Settings	Drag-and-Drop Behavior	Send-and-File Behavior			
	Copy to SharePoint	Copy to SharePoint			
	Move to SharePoint O Move to SharePoint				
	Mark Copied Emails with Label and Color				
	Enabled Label: Copied to SharePoint				
	Disabled				
	Logging				
	Log level: Normal 🔹				
	Log file: Open log file location				
	L				
		Close			

- 3. In the **History and Favorites Limits** section, enter the maximum number of items you want to display in the following lists:
 - Number of History items
 - Number of Favorite items
 - **NOTE:** the History and Favourite items numbers must be between five and 50
- 4. In the **Drag-and-Drop Behavior** and the **Send-and-File Behavior** sections, choose one of the following options:
 - **Copy to SharePoint**: choose this option if you want to retain a copy of the email in Outlook as well as filing a copy in SharePoint
 - Move to SharePoint: choose this option if you want to move the email to SharePoint without retaining a copy in Outlook

NOTE: If you choose the **Move to SharePoint** option as the default behavior, you have the option to right-click and drag one or more items into a destination folder, and a contextual menu displays, giving you the option to **Copy** OR **Move** the item.

- 5. In the Mark Copied Emails with Label and Color section, choose from the following options:
 - **Enabled**: if this setting is enabled, the text in the **Label** field displays in the header of any email that has been copied to SharePoint
 - **Disabled**: if this setting is disabled, there is no indication in the header of an email header that has been copied to SharePoint
 - Label: The default text in the label field is Copied to SharePoint; enter a new label if preferred
 - **Color**: Choose an Outlook color category from the drop-down menu for the label to display in

NOTE: this label is automatically applied to any items filed when offline.

- 6. In the **Logging** section, select the preferred option from the **Log level** drop-down menu:
 - Off: select this option if you don't want to log any information about any activity errors or warnings
 - Normal: select this option to log information about activity, errors, and warnings NOTE: this is the default logging level
 - Verbose: select this option to include more detail about activity, errors, and warnings
 - Verbose with Web Services: select this option to include the most detailed level of information about activity, errors, and warnings

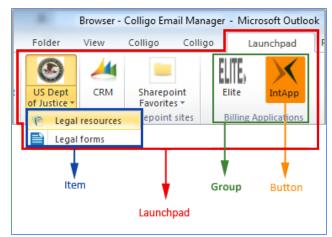
NOTE: choosing this option creates a very large log file and may slow the performance of your system

7. The Logging section allows you to set the level of detail you want to have in your error log files. These log files assist Colligo technical staff in solving any issues that may arise while using Colligo Email Manager. Click Open log file location to access the log files.

CONFIGURING LAUNCHPAD

NOTE: The Launchpad feature only functions when you are connected to your network.

Launchpad is a ribbon in Outlook where you can create groups that contain buttons linking to your most frequently used web pages and web applications for quick access from within Outlook. Once you have buttons you can choose to add related items underneath it, as shown in the below image:

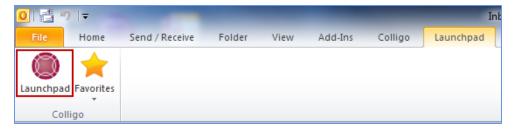


NOTE: Launchpad is not available in Outlook 2007.

To configure the Launchpad ribbon:

- 1. In the **Colligo Email Manager** group on the **Home** tab, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Launchpad**. OR

From the Launchpad ribbon, click the Launchpad icon to display the configuration dialog:



The Launchpad dialog displays:

🔘 Colligo Email Manager Configurati	ion	X
SharePoint Sites	💶 Launchpad	
Favorites	🛄 Add 📖 Remove 📅 Edit 🌟 Display Favorites 🐻 Import 涌 Export	
Folders	/ Launchpad	_
Search Locations	🚖 Email Manager Favorites	
Search Options	▲ 🛄 Links	
Launchpad	Colligo	
Settings		
	Clo	se

Editing the Launchpad Tab

To edit the name of the Launchpad tab:

1. Select Launchpad and click Edit.

The **Edit Launchpad** dialog displays:

Edit Launchpad			
Title:	Launchpad		
Screen Tip:			
Description:			
	OK Cancel		

- 2. Edit the Title field.
- 3. Enter Screen Tip text and a Description if needed.
- 4. Click **OK**.
- 5. Restart Outlook for the change to take effect.

Adding a Group

To create a group in Launchpad:

- 1. Select Launchpad and click Add.
 - The Add Group dialog displays:

Add Group	
Title:	New Group
Screen Tip:	
Description:	
	OK Cancel

- 2. In the **Title** field, enter the name of the group.
- 3. Enter Screen Tip text and a Description if needed.
- 4. Click **OK**.
- 5. Restart Outlook for the change to take effect.

Adding a Button to a Group

Once you have added a group, you can add a button to it:

1. Select the group that you want to add the button to and click **Add**.

The Add Button dialog displays:

Add Butto	n
Title:	New Button
URL:	
Icon:	Browse
Screen Tip:	
Description:	
	OK Cancel

- 2. In the **Title** field, enter the name of the button.
- 3. In the **URL** field, enter the address of the web page or web application. After you enter the URL and click away from the field, the icon associated with the URL displays in the **Icon** space. If you want to change the icon, click **Browse** to choose your preferred icon. If you click **Clear**, the default icon above is used.
- 4. Enter Screen Tip text and a Description if needed.
- 5. Click **OK**.
- 6. Restart Outlook for the change to take effect.

Adding an Item to a Button

Once you have added a button, you can add one or more items to it:

- 1. Select the button that you want to add the item to and click Add.
 - The Add Item dialog displays:

Add Item	x
Title:	New Item
URL:	
	This field is required.
Icon:	Browse
Screen Tip:	
Description:	
	OK Cancel

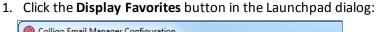
- 2. In the **Title** field, enter the name of the item.
- 3. In the **URL** field, enter the address of the web page or web application. After you enter the URL and click away from the field, the icon associated with the URL displays in the **Icon** space. If you want to change the icon, click **Browse** to choose your preferred icon. If you click **Clear**, the default icon above is used.

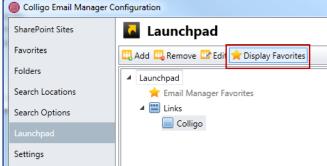
NOTE: this is a required field. You cannot create an item without a URL.

- 1. Enter Screen Tip text and a Description if needed.
- 2. Click **OK**.
- 3. Restart Outlook for the change to take effect.

Displaying Email Manager Favorites

If you have added SharePoint locations to your Email Manager Favorites list, you can also choose to display them in the Launchpad ribbon.





2. Restart Outlook for the change to take effect.

NOTE: This button is a toggle. To remove the Favorites group from the Launchpad ribbon, click the button again and restart Outlook.

The SharePoint locations from your Favorites list do not display in the Launchpad dialog; they display in the Launchpad ribbon in a group called Favorites:

File	Home	Send / Receive	Folder	View	Add-Ins	Colligo	Launchpad	
Launchpa	d Favorites	Colligo						
Co Favori I		stomized Reports ared Documents	<	Search Ir	nbox (Ctrl+E)			

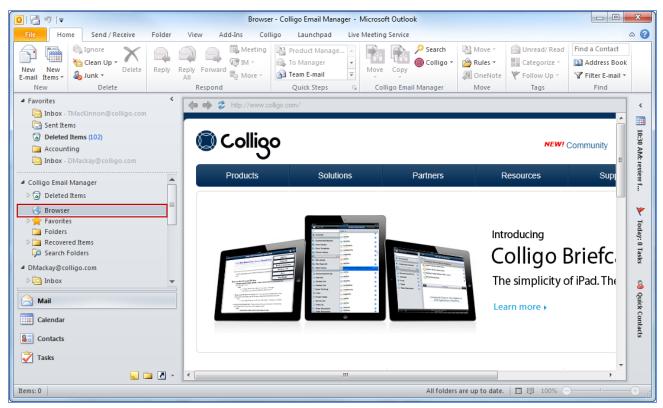
Viewing Launchpad URLs

After you have configured your groups, buttons, and items, they display on the **Launchpad** tab in Outlook:



Click on any button or item to display its associated URL. If you move to another tab in Outlook, you can click the **Browser** icon in the folder tree to go back to the last page you viewed.

You can use the refresh icon and the browser buttons in the navigation bar to navigate through the web page.



Importing and Exporting Launchpad Settings

You can export your Launchpad settings and save it as a .ribbon file on your computer. You can then import this file to another installation of Email Manager.

NOTE: The Email Manager Favorites list is not exported.

To export a Launchpad configuration file:

1. In the Launchpad configuration dialog, click the **Export** button.

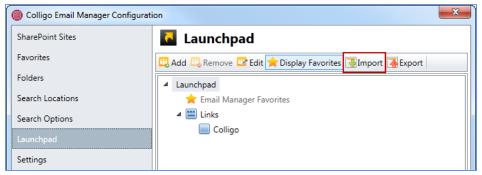
Olligo Email Manager Configurati	ion	×
SharePoint Sites	💶 Launchpad	
Favorites	🖽 Add 📖 Remove 📅 Edit 🚖 Display Favorites 💽 Import 💽 Export	
Folders	▲ Launchpad	
Search Locations	🚖 Email Manager Favorites	
Search Options Launchpad Settings	▲ 🔛 Links	

A Windows Save As dialog displays.

- 2. Enter a name for the file and browse to the location where you want to save it.
- 3. Click Save.

To import a Launchpad configuration file:

1. In the Launchpad configuration dialog, click the **Import** button.



A Windows **Open** dialog displays.

- 2. Browse to the location of the saved .ribbon file.
- 3. Click Open. The Launchpad groups, buttons, and items display in the dialog.

SEARCHING SHAREPOINT AND OUTLOOK

NOTE: This feature requires a network connection.

Colligo Email Manager provides advanced search functionality, allowing you to search within specific SharePoint sites and your Outlook account. You can use this to search for email or documents that you or others have uploaded to SharePoint, or for items in your Outlook mailbox.

NOTE: When you upload an item to SharePoint, it is available immediately within the SharePoint site. However, the item will not be returned in a search until the item has been indexed by a SharePoint crawler. The timing and frequency of the crawls are set by your administrator.

Enabling Search Capability

To enable search functionality in Outlook 2010, click the **Search** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Show/Hide Search Pane** button in the **Colligo Email Manager** toolbar:



A search pane displays along the right side of your Outlook main window. You can move the search pane to any location in your Outlook window and it stays in that location the next time you start Outlook.

Colligo	-	×
Search SharePoint 🔎 🔻		

Searching

You can perform both basic and advanced searches using Colligo Email Manager's search function.

A *basic search* means you type a keyword and the search returns anything that matches that word, regardless of the occurrence of that word.

An *advanced search* means you are searching specific metadata fields, using the same syntax you would use in an Outlook search. You type the name of the metadata field you want to search, followed by a colon, followed by the term you are searching for. You can enter multiple search terms in this format.

For example, a search with the parameters *to:John subject:manual* means you are searching the metadata fields *to* and *subject* for the terms *John* and *manual*. Any results returned from the search will meet both of these search criteria. The searchable metadata fields are configured by your systems administrator. Custom metadata is also supported.

After you have entered a search term and started the search, you can look at the progress of the search by clicking the arrow at the bottom of the search pane:

٠	III	►
\triangleright	Items: 8 Locations: 3 in progress, 1 completed	

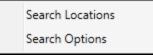
The search locations display. You can click **Cancel** to remove results from a particular site from the search.

colligo	×	
Arrange By: Date	Newest on to	op
⊿ 5/3/2012		*
📑 Demo1		
Colligo and St	narePoint Solves Re	em
<		► I
Items: 8 Locati completed	ons: 3 in progress,	1
Colligo Team Retrieving sea data (0 item	arch meta Ca	incel
JBDemo (JBD Performing se item(s) found)	earch (0 Ca	incel
P Briefcase (Bri Search comp	efcase) lete (8 item(s) foun	d)
Colligo Team Performing se item(s) found)	earch (0 Ca	incel

Defining Search Locations and Terms

To define your search locations and parameters:

- 1. Enter your search term in the search field.
- 2. Click the drop-down arrow to manage your search locations and options:



- 3. Select **Search Locations** to select the location(s) you want to search in. For more information, see Managing Search Locations.
- 4. Select **Search Options** to define your search options. For more information, see Managing Search Options.
- 5. Click the search icon to begin the search.

Any results display under the search field:

Colligo	-	×
test 🔎 🔻		
Arrange By: Date	Newest on top	
▲ 28/06/2011		*
Corporate\Bcheng New Microsoft Office Word Document.doox	10:17 PM	
Gorporate\Bcheng Bernard Cheng_28Jun11.08.44.01_test.msg	7:57 PM	
Corporate\Bcheng Bernard Cheng_28Jun11 08.44.01_test.msg	3:46 PM	
Corporate\Bcheng random_test_doc.txt	3:39 PM	
Corporate\Bcheng	3:39 PM	*
▷ Items: 202 Locations: 1 completed, 1 complete with warning		

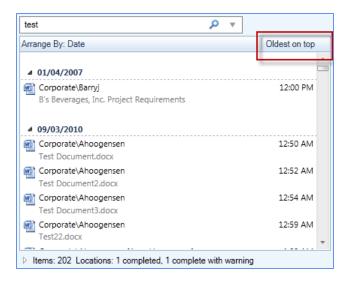
NOTE: If you are not getting any search results it is likely because the search capability for the SharePoint site has not been configured. Please contact your systems administrator.

Viewing Search Results

You can arrange your search results by item Date or Author (**From**). To toggle between these views, click on the **Arrange By** field in the results pane and select **Date** or **From**:

-4-		
\checkmark	Date	
	From	3
AChur	i Kusaa Huit	

You can also sort the results by viewing the newest item on top or the oldest item on top. To toggle between these views, click the top-right corner of the search results to get the view you want:



Additionally, if an email with an attachment is returned in your search results, the paperclip icon displays to indicate the attachment:

Colligo	
invoice	2 🗸
Arrange By: Date	Newest on top
⊿ Today	
 Today Dave MacKay 	j) 9:51 AM

Managing Search Results

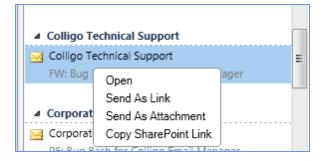
You can open and view items that display in your search results, as well as create a new email with a link to the SharePoint item.

Use the x icon to clear the search term and search results:

Colligo	▼ ×
colligo	×

Viewing an Item

To view an item in your search results, either double-click it to open and view, or right-click and select **Open** from the contextual menu:



Emailing a Link to an Item

To email a link to an item in your search results, right-click the item and select **Send As Link** from the contextual menu. This opens up a new email with a link to the item's location in SharePoint.

You can also drag-and-drop the item into your Inbox for the same result.

If you have an item in your search results that is an email with an attachment, you can open the email, then drag-and-drop the attachment into your inbox; this opens up a new email with the attachment attached. The subject line of the email defaults to the name of the attached file.

Sending Item as an Attachment

To send the item as an attachment, right-click the item and select **Send As Attachment** from the contextual menu. This launches a new email with the search result item in the **Attached** field.

Creating a Link to an Item

To copy the link to the item's location in SharePoint, right-click the item and select **Copy SharePoint Link** from the contextual menu. You can then paste the link into an email or document as needed.

Managing Search Locations

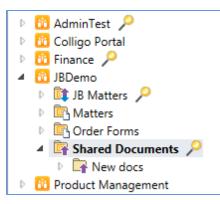
Any SharePoint site that you add to Colligo Email Manager is added to your search locations list by default. You can remove a site from the list to reduce the scope of a search, but then add it back at a later time for another search.

Adding a Search Location

You can add a site to your search locations list in one of two ways:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the site list, click the site you want to add to your search locations and click the Add Search Location icon:

A small magnifying glass icon appears at the end of the site name, indicating it is included in your search locations list.



OR

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**. The **Search Locations** dialog displays:

Colligo Email Manager Configuration					
SharePoint Sites	Search Locations				
Favorites	Remove				
Folders	Add Search Location				
Search Locations					
Search Options					
Launchpad					
Settings					
	Close				

3. Click the Add Search Location link or the Add icon. The Add Search Location dialog displays:

Add Search Location	×
0	
🕑 👸 Home	
Selected location: Home	
	OK Cancel

4. Select the site you want to add to the search list and click **OK**.

The site is now included in your search locations list.

Removing a Search Location

To remove a site from your search locations list:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**.
- 3. In the site list, click the site you want to remove and click **Remove**. The site no longer displays in the list.

Managing Search Options

The **Search Options** area of Email Manager lets you define your search parameters. To define the search options:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- In the left-hand pane of the Colligo Email Manager Configuration dialog, select Search Options. The Search Options dialog displays.

Colligo Email Manager Configuration					
SharePoint Sites	Search Options				
Favorites	Outlook				
Folders Search all mail items					
Search Locations	Search Outlook Inbox				
Search Options	Limit results to: 200				
Launchpad	SharePoint Query Options				
Settings	Limit results to: 200				
	Search On				
	◎ Files and Folders				
	All Files Filter Files				
	Type Extension				
	Microsoft Word Document docx				
	Microsoft Excel Worksheet xlsx				
	Microsoft PowerPoint Prese pptx				
	Microsoft Word 97 - 2003 I doc				
	Microsoft Excel 97-2003 W xls				
	Microsoft PowerPoint 97-2 ppt				
V vsd					
	V mpp v				
	Close				

- 3. In the **Outlook** section of the dialog, choose your parameters:
 - a. Check the Search all mail items box if you want to search your Inbox as well as all other folders in your default mailbox. The following folders are not included in the search: Junk E-Mail, Deleted Items, Public Folders, and RSS Feeds. If you have more than one email address linked to Outlook, Email Manager searches only the default account.
 - b. Check the **Search Outlook Inbox** box if you want to limit the search to your inbox content.
 - c. In the **Limit results to** field, enter the number of results you want returned per folder.
- 4. In the SharePoint Query Options section, enter the results number in the Limit Results to field.
- 5. In the Search On section, choose your parameters:
 - a. Choose from one of the following:
 - a. Files and Folders
 - b. Files Only
 - c. Folders Only
 - b. If you choose either the **Files and Folders** or **Files Only** option, you can further determine the file types you want to search by choosing one of the following:
 - a. All Files
 - b. Filter Files
 - c. If you choose **Filter Files** you can further define the type of files you are searching by checking the boxes of the file types in the list.

Custom Search Folders

Custom search folders are functionality native to Outlook and are separate from Colligo's search capability. A custom search only searches within Outlook, whereas an Email Manager search includes both your Outlook account as well as your SharePoint sites.

COLLIGO BRIEFCASE FOR WINDOWS

Welcome to Colligo Briefcase for Windows. Briefcase offers full offline support, advanced metadata support, and industry-leading sync and security capabilities, enabling organizations to embrace BYOD while maintaining control of their corporate data.

Key Features

- Tag: Add automatic or customized metadata
- Sync: Make your SharePoint content available when offline
- Share: Replace attachments with links for easy collaboration

Benefits

- Sync SharePoint desktops & laptops for mobility & performance
- Enable productive offline access
- Edit files, lists, and metadata
- Easy-to-use, familiar desktop interface
- Drive enthusiastic SharePoint adoption
- Alleviate slow connectivity to SharePoint
- Replace network shares with SharePoint for document storage and collaboration

Platforms Supported

- SharePoint 2010, SharePoint 2010 Online (Office 365), and SharePoint 2013
- Outlook 2007, 2010, and 2013 (32-bit and 64-bit)
- Windows XP, Windows Vista, Windows 7, and Windows 8

NOTE: The screenshots in this document use Outlook 2010, SharePoint 2010, and Windows 7. Your user interface may differ depending on your specific configuration.

INSTALLING AND ACTIVATING COLLIGO BRIEFCASE

NOTE: If you have already activated from the Colligo Email Manager interface, you do not need to activate Colligo Briefcase for Windows. See Installing and Activating Colligo Email Manager.

To install and activate Colligo Briefcase:

- 1. Double-click to open the Colligo Briefcase XX.zip file and extract the contents.
- 2. In the folder, double-click the folder that corresponds with your operating system:
 - a. x86: choose this option if you have a 32-bit operating system
 - b. x64: choose this option if you have a 64-bit operating system
- 4. Double-click either Setup.exe or briefcase_xNN.msi.
- 5. Follow the steps in the install wizard.
- 6. After installation is complete, enter your information to activate the software.
- 7. If you are unable to connect to the activation server, an error message displays:

Activate	Activate Colligo Briefcase		
8	Activation Failed The Colligo Activation Server was not reachable. Activation will be attempted the next time you use the software. Alternately, you can choose to activate through email.		
	Activate via Email Activate Later		

NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

- 8. Click Activate by Email.
- 9. On the following screen, click **Export Activation Request**.
- 10. Save the ActivationRequest.txt file in your preferred location.
- 11. Attach this file to your email and send to activation@colligo.com.

NOTE: If you are upgrading from a previous version of this product, you may see a migration wizard that helps you migrate your settings into this new version.

Checking for Updates

To check if you are using the most current version of Colligo Briefcase, select the **Help** menu and select **Check for Updates**.

The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

Updating Your License Key

To change your license key:

1. From the Help menu, select Install License Key.

The Enter License Key dialog displays:



2. Enter your license key and click **OK**.

Adding SharePoint Sites

Colligo Briefcase lets you connect to SharePoint sites through both the stand-alone interface and the Windows Explorer extension. You can add a SharePoint list or library to Colligo Briefcase in one of two ways:

- Using the **Download New Site** option
- Using the Connect to Briefcase option in Internet Explorer

When you add a site in Colligo Briefcase, the same site is also added to Colligo Email Manager. Similarly, if you add a site in Colligo Email Manager, it is also added to Colligo Briefcase at the same time.

Adding a Site in Colligo Briefcase

You can add a SharePoint list or library to Colligo Briefcase in one of two ways:

- Using the Download New Site option
- Using the Connect to Briefcase option in Internet Explorer

Using the Download New Site Option (Stand-alone Interface)

To connect a site from the Briefcase stand-alone interface:

1. From the Site menu, choose Download New Site:

0	Colligo Briefcase			- - X	
E	ile	Site	<u>V</u> iew <u>H</u> elp		
s	ite:	3	Synchronize	👻 🛛 🖓 View Sync Issues	
		G)	Synchronize <u>M</u> ultiple Sites		
		G)	Synchronize <u>All</u> F9		
9	ite	G)	Synchronize Pending Changes	lew • Upload • Filter • View:	-
	[Ë,	Download New Site		
			Manage Sites		
			<u>R</u> emove Site		
		_			
	No Synchronization Activity				

The **Download New Site** dialog displays.

🚯 Download New Site
Site:
URL:
Examples: http://server/workspace https://secureserver/workspace
Server Authentication
Authentication Type: Auto-detect
 Use default credentials
C Use the following credentials:
User name:
Password:
Download Close

- 3. In the Authentication Type drop-down menu, choose one of the following options:
 - Auto-detect
 - Windows Classic
 - Windows Claim-based
 - Form-Based
 - ADFS 2.0
 - Office365
 - Office365 by Prompt
- 4. Select either your default credentials, or supply other user-specific credentials.
- 5. Click Download.

The Select for Synchronization dialog displays the lists and libraries you have permissions for:

Select for Synchronization
Document Libraries and Lists Synchronize all document libraries and lists Synchronize the following:
Signature Announcements Signature Announcements Signature Announcements
Image: Second state of the second s
Click the checkbox to enable or disable synchronization for the specified list. Check All Uncheck All Filter Synchronize Close

- 6. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
- 7. Click Filter to select which folders and views you want to synchronize.

The Select Filters for Synchronization dialog displays:

Select Filters for Synchronization	×	
Disable Synchronization for this Document Library Synchronize Entire Document Library Only synchronize content based on the following filters:		
Synchronized Folders	g	
Available Folders	Selected Folders	
Arakelyan et al v. Contoso LLC	Add >> Remove	
Available Views	Add >> Remove	
Cancel Filter Refresh	OK Cancel	

- 7. Choose from the following options:
 - **Disable Synchronization for this Document Library**: choose this option if you do not want the document library to be available offline.
 - Synchronize Entire Document Library: choose this option if want to synchronize everything in the specified document library.
 - Only synchronize content based on the following filters: choose this option if you want to selectively choose what folders and views are synchronized. In the Synchronized Folders and Synchronized Views sections, select a folder or view you want to synchronize and click Add to move it to the Selected Folders/Views column.
- 8. Click **OK**.
- 9. Click Synchronize. The site displays in Colligo Briefcase.

Using the Download New Site Dialog (Windows Explorer Interface)

To connect a site from the Windows Explorer interface:

1. Right-click the **Colligo Briefcase** node and select **Download New Site** from the contextual menu:

				_ 0	x
Computer	 Colligo Briefcase 	▼ 49	Search Colligo Briefcase		٩
Organize 🔻			- 11	-	0
 ▷ ▷ ▷ ○ ○	Expand Open in new window				
🕌 Keygen	Download New Site]			
1 item					

The **Download New Site** dialog displays.

- 2. Choose your Authentication Type and use your default credentials, or user-specific credentials.
- 3. Click Download.

The site displays under the **Colligo Briefcase** node in Windows Explorer. However, the site's lists and libraries are not synchronized at this point and display as greyed out in Windows Explorer.

4. To synchronize a list or library, right-click it and select **Enable Synchronization**. To select filters for synchronization, right-click a list or library and select **Filter Synchronization**.

Computer 🕨 Colligo Brief	case 🕨 Colligo Portal 🕨 🚽 👍 Search Colligo Portal 🔎
Organize 🔻	ii 🗸 🗍 📀
 ➢ Libraries ➢ Documents ➢ Music ➢ Pictures ➢ Videos ➢ Tessa MacKinnon ➢ Computer ※ BOOTCAMP (C:) ※ BOOTCAMP (C:) ※ BOOTCAMP (C:) ※ BOOTCAMP (C:) ※ DVD RW Drive (D:) ○ Macintosh HD (E:) ○ Macintosh HD (E:) ※ Outlogo Briefcase ※ Colligo Portal ※ Network ※ Control Panel ※ Recycle Bin 》 Keygen 	 Customized Reports Form Templates Shared Shared Shared Disable Synchronization Enable Synchronization Filter Synchronization Copy SharePoint URL Default Metadata Values
Shared Documents	

After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:

• Right-click the Colligo Briefcase icon in the system tray and choose Synchronize All:

	Open Colligo Briefcase
\checkmark	Automatic Synchronization
	Synchronize All
	View Synchronization Status
	Cancel Synchronization
	Exit

- From the **Site** menu in the stand-alone Colligo Briefcase interface, choose one of the following options:
 - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the Synchronize Multiple Sites dialog, check your preferred sites and click Synchronize.
 - Synchronize All: choose this option to synchronize all sites
 - Synchronize Pending Changes: choose this option to synchronize changes you have made

Using the Connect to Briefcase Button

- 1. Navigate to a SharePoint List or Library in Internet Explorer.
- 2. Click the green **Connect to Briefcase** icon on the toolbar.

F)		http	://vs-	·sp2(010/PM/	'SitePages/	Home.asp)X		Q	- (<u>ا</u> د	🔁 Prod	uct Management - Ho	×
	- 5	•	_	÷	•	Page 🔻	Safety 🔻	Tools 🔻	? -	N	٥	N),		0)	
															Connect to Briefcase	
Site /	Actions	•	2	2	Br	rowse	Page									

The **Download New Site** dialog displays.

🔃 Download New Site
Site: <new site=""></new>
URL:
Examples: http://server/workspace https://secureserver/workspace
Server Authentication
Authentication Type: Auto-detect
 Use default credentials
O Use the following credentials:
User name:
Password:
OwnloadOose

- 3. In the Authentication Type drop-down menu, choose one of the following options:
 - Auto-detect
 - Windows Classic
 - Windows Claim-based
 - Form-Based
 - ADFS 2.0
 - Office365
 - Office365 by Prompt
- 4. Select either your default credentials, or supply other user-specific credentials.
- 5. Click Download.

The Select for Synchronization dialog displays the lists and libraries you have permissions for:

Select for Synchronization					
Document Libraries and Lists O Synchronize all document libraries and lists O Synchronize the following:					
Synchronize the following: Synchronize the following: Synchronize the following: Synchronize the following: Substance of the following:					
Click the checkbox to enable or disable synchronization for the specified list. Check All Uncheck All Filter					
Synchronize Close					

- 6. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
- 7. Click Filter to select which folders and views you want to synchronize.

The Select Filters for Synchronization dialog displays:

elect Filters for Synchronization	×						
$\ensuremath{\mathbb{C}}$ Disable Synchronization for this Document Librar	ry						
O Synchronize Entire Document Library							
Only synchronize content based on the following filters:							
Synchronized Folders							
Available Folders	Selected Folders						
Arakelyan et al v. Contoso LLC ICE Co vs Contoso							
	Add >>						
	Remove						
I Synchronized Views							
Available Views	Selected Views						
III All Documents							
III My Matters	Add >>						
IIII Recent Documents	Remove						
1							
Cancel Filter Refresh	OK Cancel						

- 7. Choose from the following options:
 - **Disable Synchronization for this Document Library**: choose this option if you do not want the document library to be available offline.
 - Synchronize Entire Document Library: choose this option if want to synchronize everything in the specified document library.
 - Only synchronize content based on the following filters: choose this option if you want to selectively choose what folders and views are synchronized. In the Synchronized Folders and Synchronized Views sections, select a folder or view you want to synchronize and click Add to move it to the Selected Folders/Views column.
- 8. Click **OK**.
- 9. Click Synchronize. The site displays in Colligo Briefcase.

Editing Lists and Libraries

After you have added your site and chosen which lists and libraries you want to sync, you may want to go back at a later time and edit your choices.

Any edits you make to the lists and libraries in Colligo Briefcase are also reflected in Colligo Email Manager.

You can edit your lists and libraries in one of two ways:

- 1. Right-click a list or library and select **Enable Synchronization** from the contextual menu.
- 2. Synchronize the site.

OR

1. From the Site menu, choose Download New Site.

The Download New Site dialog displays:

🔃 Download New Site
Site: <new site=""></new>
URL:
Examples: http://server/workspace https://secureserver/workspace
Server Authentication
Authentication Type: Auto-detect
 Use default credentials
C Use the following credentials:
User name:
Password:
Download Close

2. From the **Site** drop-down list, choose which site you want to configure.

The Synchronize Site dialog displays:

🔁 Synchroniz	ze Site						
Site:	Colligo Intranet						
URL: http:/	//vs-sp2010						
Examp	ples: http://server/workspace https://secureserver/workspace						
Synchronizat	tion Settings						
	 Only some lists will synchronize. 3 complete, 0 partial, 9 disabled Configure 						
Perform full synchronization Selecting this option synchronizes all site content, including users, views and templates. If your permissions on the site have changed, you should select this option to get all the content you now have access to. Selecting this option will result in longer download times.							
<u>Synchronize</u> <u>C</u> lose							

- 3. Click Configure.
- 4. In the **Configure Synchronization** dialog, choose which Lists and Libraries you want to sync.
- 5. Click **OK**.
- 6. Click Synchronize.

Removing a Site

When you remove a site in Colligo Briefcase, the same site is also removed from Colligo Email Manager.

To remove a site from Briefcase:

1. From the Site menu, choose Manage Sites.

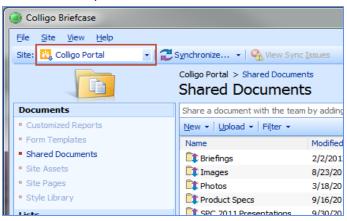
The Manage Sites dialog displays:

Manage Sites
Colligo Portal
http://portal.colligo.com
Configure Remove Close

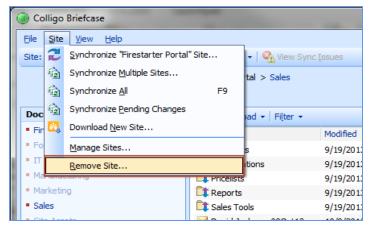
2. Select the site you want to remove and click **Remove**.

OR

1. Select the site you want to remove in the **Site** field:



2. From the Site menu, choose Remove Site:



SETTING SYNCHRONIZATION OPTIONS

In Briefcase you can set your Synchronization options to your lists and libraries sync automatically. However, you can also perform manual syncs as well.

Configuring Automatic Synchronization Options

NOTE: the synchronization options you set in Colligo Briefcase also apply to Colligo Email Manager.

1. From the **View** menu, select **Options**.

The Colligo Briefcase Options dialog displays:

Colligo Briefcase Options
Storage
Storage location C:\Users\tmackinnon\AppData\Local\ColligoOr Browse
General
Prompt for properties when adding documents
Use current Windows® appearance
Synchronization
Synchronize on startup
Synchronize when list is viewed
Synchronize when list is modified
✓ Enable combined check-in and sync
✓ Enable background synchronization
Background synchronization interval: 1440 minutes
Automatically download lists to resolve Site Column values
Cancel Apply

- 2. In the General section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring default metadata; see **Setting Default Metadata**.
- 3. In the **Synchronization** section, choose your preferred options:
 - **Synchronize on startup**: choose this option if you want your lists and libraries to synchronize every time Email Manager starts
 - Synchronize when list is viewed: choose this option if you want your lists and libraries to synchronize every time you view a list or library
 - Synchronize when list is modified: choose this option if you want your lists and libraries to synchronize every time you modify a list or library
 - Enable Combined check-in and sync: choose this option if you want to both check an item in and sync it at the same time. If this option is not checked, the item remains checked out after the sync.
 - Enable background synchronization: choose this option if you want to set the synchronization to happen in the background on a time-specific basis, and enter your preferred time interval

• Automatically download lists to resolve Site Column values: if you have lists that reference other lists (look-ups), checking this option ensures the related referenced lists are also down-loaded

NOTE: Depending on how your IT Administrator has configured the installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

Synchronizing Sites Manually

After you have added your sites, you may want to synchronize them manually:

1. Click the **Synchronize** menu to display the options:

Colligo Briefcase							
<u>File Site View H</u> elp							
Site: 🔠 Firestarter Portal 🔹	2:	Synchronize 👻 🆓 View Sync Issue	S				
	2	Synchronize "Firestarter Portal" Site		ts			
	ିକ୍ର	Synchronize <u>M</u> ultiple Sites					
Documents	6	Synchronize <u>A</u> ll	F9			View	All Documents 🔹 🎹
Finance	ିକ୍ର	Synchronize Pending Changes			Modified		Modified By
Form Templates	83,	Download New Site	- 1		9/19/2013 10:37 AM		David Jackson
• IT	_	FireStarter Racer Range data	asheet.pd	lf	9/19/2013 10:38 AM		David Jackson
 Manufacturing 							
 Marketing 							
Datasheets							
 Sales 							
 Site Assets 							
Site Pages							
 Social 							
Style Library							
Lists							
 Campaign Tasks 							
Event Schedule							
 Staff Directory 							
 Vacation Tracking 							
		•					Þ
						Last Synchronizat	ion: 10/21/2013 3:19:08 PM

- 2. Choose from the following:
 - Synchronize Site: select this option to synchronize the site currently displayed
 - Synchronize Multiple Sites: select this option to display all sites and choose which ones you want to synchronize
 - Synchronize All: select this option to synchronize all sites
 - Synchronize Pending Changes: Select this option to synchronize any lists or libraries containing changed content

The Synchronization In Progress dialog displays for any of the above options:

Site List:	Site: 🚯 Colligo Portal	
🔹 📴 Colligo Portal	Server:	
	Synchronization Activity	
	Current List: 📴 Shared Documents	
	Status: Receiving Office2010QA.doc (990 KB)	
	Received: 13 of 96 Sent: 0 of 0	
	Working	
	Cancel	
	Close this window when synchronization completes	

The **Status** field displays the name and size of the file being synchronized, as well as if the file is being sent or received.

Viewing Pending Changes

When you are not connected to your SharePoint server, any changes and edits you make are listed in the **Pending Synchronization Changes** dialog. You can review the changes you've made before synchronizing them.

From the **View** menu, select **View Pending Changes**. The **Pending Synchronization Changes** dialog displays any items that will be synchronized the next time you are connected to the network. You have the option in this dialog to right-click an item and select discard if you want to revert the change.

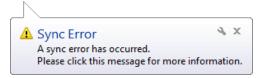
Completing a Full Synchronization

Several of the synchronization dialogs have a **Perform Full Synchronization** option. This option means that additional information is downloaded, including definitions for Sites, Lists, Views, and Content Types, plus other site content that may not be retrieved during other standard sync processes.

Viewing and Resolving Synchronization Issues

When a sync error occurs, the item where the error occurred is highlighted and an error icon is overlaid over the file type icon.

There is also a dialog that pops up from the system tray icon to indicate a sync error; you can click the pop up for more information about the :



In addition, the View Sync Issues button changes color so it is more visible.

You can click the View Sync Issues button to display the Sync Issues pane:

Colligo Briefcase			1.11.00.00	
Eile Site View Help	0			
Site: 📆 Firestarter Portal 💿 🔀 Synchronize	👻 🦓 View Sync <u>I</u> ssues (1)			
	Firestarter Portal > Sales > Contracts Sales			
Site Content	New - Upload - Filter -			View: All Documents 🔹
	Name Contract Draft.docx Contract_adrenalme bikes - Oct13.docx Contract_adrenalme bikes - Oct13.pdf Contract_adrenalme bikes.docx Contract_adrenalme bikes.docx Contract_adrenalme bikes.docx Contract_adrenalme bikes.docx Contract_docx Contract.docx Contract.docx Contract.doc Con	3/25/20 David Jackson 3/25/20 David Jackson 11/6/20 David Jackson 3/25/20 David Jackson 3/24/20 Helen Jones 3/26/20 David Jackson 3/31/20 David Jackson 3/31/20 David Jackson	From Sent Subject To Davi 3/2 RE: Fir D PO 3/2 7 Esse D	
Staff Directory	Sync Issues			
Wacation Tracking	Issue Item	Site	List	Folder
	Losee Ltein ▲ Conflict			/Contracts
	4		() Last Synch	ronization: 3/31/2014 1:54:59 PM

The sync error displays the type of issue, the item name, site, list, and folder. You can use these columns to sort your sync issues.

To resolve a sync issue, right click the line item and choose View Conflict.

The **Resolve Synchronization Conflict** screen displays:

Local Ve	ersion	Serve	er Version	
Options		Options		
Content Type: Document	4	Content Type: Docume	nt	
Properties		Properties		
Name	*	Name		-
* Name	Letterhead	* Name	Letterhead	
Title		Title		
Author	DJackson 👻	Author	DJackson	-
<	Þ	<		Þ.
Last Update		Last Update		
Editor: David Jackson		Editor: Jerry McKenzie	e	
Modified: 3/12/2014 1:56:08	3 PM	Modified: 3/12/2014 1:5	5:51 PM	
Version: 1.7		Version: 1.8		
Choose Loc		e Versions Choose S	erver Version	

You can choose to merge the two versions, or choose either the local or server version to resolve the conflict.

VIEWING, EDITING, AND CREATING NEW CONTENT IN BRIEFCASE (STAND-ALONE INTERFACE)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Briefcase interface.

NOTE: If you have set certain SharePoint locations as upload-only in Email Manager, the content of those locations is not available to you when offline.

Offline locations display as follows:

Colligo Briefcase			
<u>File Site View H</u> elp			
Site: 👸 Colligo Portal 🛛 🔹 🥤	🔁 S <u>v</u> nchronize 👻 🍕 View Sy	nc <u>I</u> ssues	
	Colligo Portal > Shared Document		
Documents	Share a document with the team	by adding it to this docu	ment
 Customized Reports 	New 🕶 Upload 🕶 Filter 🕶		
Form Templates	Name	Modified	Mo
 Shared Documents 	C Briefings	2/2/2012 9:02 AM	со
 Site Assets 	SPC 2011 Presentations	9/30/2011 12:18 PM	со
 Site Pages 	acme quote 2003.doex	8/15/2012 3:27 PM	со
Style Library	ACME Quote-Word 2003	2/14/2013 3:30 PM	Tes
Lists	ACME Quote-Word 2007	10/25/2012 2:14 PM	Tes
Announcements	💦 arma.png	10/16/2012 9:36 AM	Tes

Upload-only locations display as follows:

Colligo Briefcase			
<u>File S</u> ite <u>V</u> iew <u>H</u> elp			
Site: 👸 Colligo Portal 🛛 👻 🥤	🛃 S <u>v</u> nchronize 👻 🆓 View Sy	nc <u>I</u> ssues	
	Colligo Portal > Shared Document		
	This list is currently configured for	or upload only. Click h	ere to enable loo
Documents	Share a document with the tean	n by adding it to this do	ocument library.
 Customized Reports 	New 🕶 Upload 👻 Filter 👻		
Form Templates	Name	Modified	Modified By
 Shared Documents 	Rriefings	:/2/2012 9:02 AM	CORPORATE\t
 Site Assets 	SPC 2011 Presentations	/30/2011 12:18 PM	CORPORATE\t
 Site Pages 			
Style Library			
Lists			
Announcements			

The Tree View in the stand-alone interface allows you to view content more dynamically and to move and copy content between folders in the same SharePoint site using drag-and-drop. You can change the view by enabling or disabling the **Tree View** option in the **View** menu:

Colligo Briefca	ase			
Eile Site View	<u>H</u> elp		_	
Site: 🔠 C 💁	View Sync <u>I</u> ssues	;	View Sync <u>I</u> ssues	
	View Synchroniza	ation <u>S</u> tatus	nared Documents	
	View Pending Cha	anges	ocuments	
Site Conte	Show Filter Choices		t with the team by adding it to this doo	cument library.
Cus	<u>R</u> efresh	F5	+ Filter →	
For	Options			Modified
A C Sha	Tree View			2/2/2012 9
T SPC 2	2011 Presentation	La SPC 2011 P	esentations	9/30/2011
Site Asse		🖷 acme quote	2003.docx	8/15/2012
Site Page		ACME Quote	e-Word 2003.doc	2/14/2013

NOTE: you cannot enable or disable synchronization of document libraries or lists while Tree View is enabled. If you want to do this, you must turn off Tree View and work in List View.

NOTE: If the Tree View option is not available to you, it has been disabled by your IT Administrator.

The following icons are overlaid on file type icons in the sync pane to indicate the following item statuses:

- Sync error: 🚾
- Sync pending: 🔤
- Checked out by me: 💼
- Checked out by another user:
- Declared Record:

Viewing Content

To view an item in a library/folder, double-click it. It opens in the program native to the item type. You can then edit the item if preferred.

If Tree View is enabled, you can expand and contract folders in the left pane to navigate to the SharePoint location you are looking for. The folder that is highlighted in the Tree View indicates the SharePoint location you are currently are viewing.

Colligo Briefcase Elle Site Yiew Help				
Site: 👸 Firestarter Portal 💿 🚽 🛃 Syn	ichronize 👻 🆓 View Sync <u>I</u> ssues			
	Firestarter Portal > Sales > Pricelists Sales			
Site Content	New 🕶 Upload 🕶 Filter 🕶		View: All C	ocuments 🔹 🔟
Finance	Name	Modified	Modified By	
Form Templates	FireStarter price list Retail.xls	9/20/2013 4:13 PM	David Jackson	
国 IT Manufacturing	Price list.xls	9/19/2013 10:41 AM	David Jackson	
Marketing	Price list_Partners.xls	9/19/2013 10:41 AM	David Jackson	
▲ I Sales				
Contracts				
T Presentations				
Pricelists				
Reports				
Site Assets				
Site Pages				
E Social				
Style Library				
🛄 Campaign Tasks				
Event Schedule				
Staff Directory				
Wacation Tracking				
			Last Synchronization: 10	/21/2013 3:19:11 PM

Viewing Item Version History

If a library has versioning enabled, you can view an item's version history by choosing the **Version History** option in the right-click contextual menu:

Colligo Briefcase					
<u>File Site View H</u> elp					
Site: 📆 Firestarter Portal 🔹 🛃	S <u>v</u> nchronize 👻 🛛 🍳	Vie	w Sync <u>I</u> ssues (1)		
	Firestarter Portal > Sales	Sale	s > Contracts		
Documents	New - Upload -	Filt	er 🕶		
Finance	Name		Modified	Modified By	
Form Templates IT	Contract Draft		Edit Properties	ny McKenzie en Jones	
Manufacturing	Contract_adre	w	Open with Microsoft Word	en Jones	
 Marketing 	Contract_adre	w	Edit with Microsoft Word	en Jones	
Sales			Сору	-	
 Site Assets 					
 Site Pages 			Paste		
 Social 		Ъ	Check Ou <u>t</u>		
 Style Library 		ሌገ	Version History		
Lists			Send As Link		
 Campaign Tasks 					
Event Schedule			Send As Attachment		
 Staff Directory 		9.	Copy SharePoint URL		
 Vacation Tracking 		9.	Copy SharePoint Doc ID URL		
			<u>R</u> ename		
		×	Delete		
			Create Shortcut		

NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.

The Version History window displays:

No	Modified	Modified By	Size	Comments	
8.10	6/19/2013 9:34:00 AM	Bernard Cheng	160		
8.9	6/19/2013 9:33:00 AM	Bernard Cheng	153		
8.8	6/19/2013 9:30:00 AM	Bernard Cheng	157		1
8.7	6/19/2013 9:30:00 AM	Bernard Cheng	145		
8.6	6/19/2013 9:30:00 AM	Bernard Cheng	188		
8.5	6/19/2013 9:25:00 AM	Bernard Cheng	176		
8.4	2/12/2013 11:36:00 AM	Bernard Cheng	145		
8.3	2/12/2013 9:35:00 AM	Bernard Cheng	138		L
8.2	2/12/2013 9:27:00 AM	Bernard Cheng	124		
8.1	2/12/2013 9:26:00 AM	Bernard Cheng	123		
8.0	2/8/2013 3:23:00 PM	Steve Beishuizen	103		
7.0	2/8/2013 3:20:00 PM	Steve Beishuizen	69		

Click on a version number to open the SharePoint version of the item.

Emailing a Link or an Attachment

You can email a link to a SharePoint item or you can send the item as a physical attachment.

Choose either Send As Link or Send As Attachment from the contextual menu:

Colligo Briefcase			
<u>File Site View H</u> elp			
Site: 👸 Firestarter Portal 🔹 😴	S <u>y</u> nchronize 👻 🍕 Vie	ew Sync <u>I</u> ssues (1)	
	Firestarter Portal > Sale	s > Contracts	
Documents	New - Upload - Filt	er 🕶	
Finance	Name	Modified	Modified By
Form Templates IT	Contract Draft.doo	Edit Properties	Dorrey McKenzie
Manufacturing Marketing	Contract_adren	Open with Microsoft Word	n Jones n Jones
 Sales Site Assets Site Pages 		Copy Paste	
SocialStyle Library		Check Ou <u>t</u>	_
Lists Campaign Tasks Event Schedule Staff Directory Vacation Tracking	2	Send As Link Send As Attachment Copy SharePoint URL Copy SharePoint Doc ID URL Rename	

Choosing one of these options launches your mail client with the link or physical attachment already present.

Creating a Shortcut to an Item

You can create a shortcut to any SharePoint item from the contextual menu:

Colligo Briefcase						
<u>File Site View H</u> elp						
Site: 📆 Firestarter Portal 💿 🚽 🌊 Synchronize 👻 🍕 View Sync Issues (1)						
	Firestarter Portal > Sale	s > Contracts				
Documents	New - Upload - Filt	ter 🔻				
Finance	Name	Modified	Modified By			
 Form Templates IT 	Contract Draft	Edit Properties	ry McKenzie en Jones			
Manufacturing	Contract_adre	Open with Microsoft Word	en Jones			
 Marketing 		Edit with Microsoft Word	en Jones			
Sales		Сору				
 Site Assets 		Paste				
 Site Pages 			_			
Social	-2	Check Ou <u>t</u>				
 Style Library 	5	Version History				
Lists Campaign Tasks		Send As Link				
Campaign Tasks Event Schedule		Send As Attachment				
 Staff Directory 	2	Copy SharePoint URL	-			
 Vacation Tracking 	8					
	2		_			
		<u>R</u> ename				
	×	Delete				
		Create Shortcut				

The default location for the shortcut is your desktop.

Editing Content

To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If another user has opened the document, edited it, and uploaded it to SharePoint, and you try to upload the same document with your changes, the following dialog displays:

Local Version	Server Version	
Document	Document	
StratMLFAQ20091027.doc Microsoft Word 97 - 2003 Document 74.0 KB (75,776 bytes)	StratMLFAQ20091027.doc Microsoft Word 97 - 2003 Document 74.0 KB (75,776 bytes)	
Open Wicrosoft Word	Open Wicrosoft Word	
Folder	Folder	
i	i	
Properties	Properties	
Content Type: Demo Document 💌	Content Type: Demo Document	
Name *	Name *	
StratMLFAQ20091027.doc	StratMLFAQ20091027.doc	
Title	Title	
StratMLFAQ20091027.doc	StratMLFAQ20091027.doc	
Correspondence List Audio Visual	Correspondence List Audio Visual	
Defence + Justice + Custodial	Defence + Justice + Custodial	
Apply Revert	Apply Revert	
Last Update	Last Update	
Editor: Tessa MacKinnon Modified: 07/09/2011 5:12:31 PM	Editor: Tessa MacKinnon Modified: 07/09/2011 5:13:25 PM	
Choose Local Version Merge	Versions Choose Server Version	

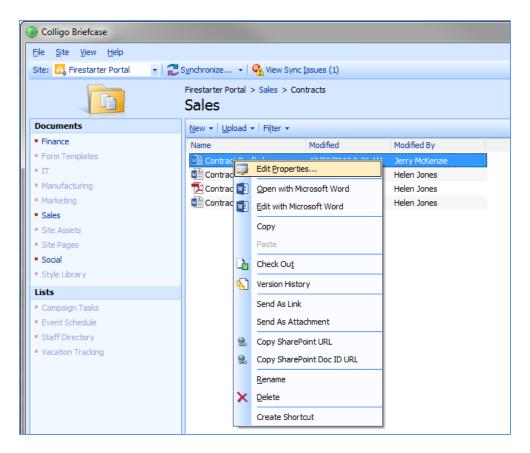
You can click **Open** to view the edits in each version, and then click one of the following options:

- **Choose Local Version**: if you choose this option, the version on your local machine overwrites the current version on SharePoint
- Merge Versions: If you choose this option, a wizard displays and walks you through a process to choose the changes you want to keep or discard
- **Choose Server Version**: if you choose this option, the version on SharePoint does not change; you are effectively discarding your version

Editing Item Properties

To edit the properties of an item:

1. Right-click the item and choose Edit Properties:



The Edit Properties dialog displays.

2. Edit as preferred and click **Close**.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

Checking Items In or Out

To check an item in or out, right-click it and choose **Check Out/In**. The **Check In** option only displays if you have previously checked the item out.

Once you have checked an item out, the Check Out icon is overlaid on top of the document type icon, so users can see that the item is being edited:

After you have checked the item out, you can open it, edit it, and then check it back in to the list/library. The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If you try to check out an item that has been modified in SharePoint and not synchronized, the following message displays:

Check Out Item(s)		X
The operation completed with errors.		
Item	Message	Description
😣 Colligo Style Sheet.docx	Version Mismatch	The version of the file on the server is different from the I
1		
	Clo	ose

Close the dialog, synchronize the site so you have the most up-to-date version of the document, and then perform the **Check Out** operation again.

To avoid the above conflict, select the combined check-in and sync option as described in **Setting Synchronization Options**.

Renaming Items

To rename an item:

- 1. Right-click it and select **Rename**.
- The item name becomes editable. Edit as preferred, and press Enter to complete the change. The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot rename an item if it is checked out by another user. If the item is checked out, a red Check Out icon displays on the item.

Deleting Items

To delete an item, right-click it and select **Delete**.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot delete an item if it is checked out by another user. If the item is checked out, a red check-out icon displays on the item.

Creating New Content

In addition to editing existing content in SharePoint, you can also add new content to your synchronized lists and libraries.

You can add items to Briefcase in one of the following ways:

- Create new documents from the Briefcase menus
- Upload existing content
- Drag-and-drop or copy-and-paste content

Adding a New Document to a List/Library

To add a new document to a list or library:

1. Select the list or library you want to add the document to and click the **New** menu and select your preferred document type from the drop-down list:

Colligo Briefcase						
<u>File Site View H</u> elp						
Site: 📆 Firestarter Portal 🔹 🛛 🛃 Sync	chronize	e 👻 🍕 View	Sync <u>I</u> ssues			
	Firesta Sale	arter Portal > Sa	les > Pricelists			
Site Content	<u>N</u> ew		ilter 👻		View:	All Documents 🔹 🛄
Finance		Document		Modified	Modified By	
Form Templates		Email	t Retail.xls	9/20/2013 4:13 PM	David Jackson	
国 IT 国 Manufacturing		Image		9/19/2013 10:41 AM	David Jacksor	
▶ ■ Marketing		-	xls	9/19/2013 10:41 AM	David Jacksor	
▲ ■ Sales		Folder				
Contracts						
Presentations						
C1 Pricelists						
Reports						
Sales Tools						
Site Assets						
Site Pages						
Style Library						
Campaign Tasks						
Event Schedule						
Staff Directory						
Vacation Tracking						
					I ast Synchronizatio	n: 10/21/2013 3:19:11 PM
	_				- Cast Synchronizadd	1. 10/21/2013 3:19:11 PM

The Create New Document dialog displays:

Create New Document	x
Site Templates Other	
template	
Please enter a name for this new document:	
New Document	
Create Cancel	

- 2. Choose your document type from the **Site Templates** tab or the **Other** tab.
- 3. Enter a name for the document, and click **Create**.

The **Edit Properties** dialog displays. This is where you can record information about the document that you are adding to SharePoint.

4. Edit the **Edit Properties** dialog as preferred.

Edit Properties		
Options		
Content Type: Document	T	
Properties		
Name	Value	
* Name	New Document	.docx
Title		
Description		* *
	OK	(Cancel

5. Click **Create**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

To add an existing document to a list or library:

1. With the list or library you want to add the document to selected, click the **Upload** menu, and choose **Upload Documents**:

Colligo Briefcase						ı x
File Site View Help Site: 🕄 Firestarter Portal	🗸 🛛 🔁 Synchr	ronize 👻 🍕 View Sync Issues				
	Fi	irestarter Portal > Sales > Pricelists Sales				
Site Content	_	New 🔹 Upload 👻 Filter 🔹		View:	All Documents	•
Finance		Name Documents	Modified	Mo	dified By	
Form Templates		FireStarter price list Retail.xls	9/20/2013 4:13 PM	Da	vid Jackson	
IT Manufacturing		Price list.xls	9/19/2013 10:41 AM	Da	vid Jackson	
 Marketing 		Price list_Partners.xls	9/19/2013 10:41 AM	Dar	vid Jackson	
▲ Bales						
Contracts						
Presentations						
C1 Pricelists						
Reports						
Site Assets						
Site Pages						
Cocial Social						
Style Library						
Campaign Tasks	•					
			Las	t Synchronizatio	on: 10/21/2013 3:1	9:11 PM

The **Upload Documents** dialog displays.

- 2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.
- 3. The Edit Properties dialog displays. Edit as preferred and click Create.

The document is added to the SharePoint location. If you have selected more than one document, any properties you assign apply to all items.

Dragging-and-Dropping Content

You can drag-and-drop one or more files or complete folder structures into Briefcase from your desktop or from other directory locations.

- 1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in Briefcase .
- 2. The **Edit Properties** dialog displays. Edit as preferred and click **Create**. The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

You can also drag-and-drop content from the Windows Explorer extension to the stand-alone interface. This action is a copy and paste; cut is not supported in this feature.

Moving or Copying Content within SharePoint

You can move or copy content from one location in SharePoint to another location, through the Colligo Briefcase interface.

NOTE: this feature is disabled by default. Contact your IT Administrator.

1. Select one or more files in a library or folder, and drag-and-drop it to another folder.

The **Edit Properties** dialog displays.

2. Edit as preferred and click Create.

The following dialog displays:

() M	ove or Copy
▲	Warning:
	A file's version history, last modified time, and creator information are deleted during the Move or Copy action. The Move action deletes the original file(s).
	Move Copy

3. Click **Move** or **Copy**. Note that no version history, timestamps, or original author information is preserved in either the Move or Copy action. If you choose to move an item, the original file is deleted. In addition, any metadata associated with the original file will not be preserved and you will need to enter new metadata for the item.

NOTE: You cannot move an item that is checked out by another user. If you attempt to do this, the following error message displays:

Colligo Briefcase
There were errors validating the move operation. Hover your mouse over an item to see the details.
I
Copy Cancel

If you hover your mouse over the item, a message displays telling you who has the item checked out. That user needs to check the item back in before you can move the item.

You can also drag-and-drop content from the Windows Explorer extension to the stand-alone interface. This action is a copy and paste; move is not supported in this feature.

Searching Content

If the search feature is enabled, you can enter a term in the search field and it will search the entire SharePoint site that you are currently viewing:

Colligo Briefcase						
<u>File Site View H</u> elp						
Site: 🔣 Firestarter Portal	- 2	S <u>y</u> nchronize 👻 🍕 View Sync	Issues	Search on SharePoint:	P	
		Firestarter Portal > Sales				
Documents		New - Upload - Filter -			View: All Documents	
Finance		Name	Modified	Modified By		
Form Templates		Contracts	9/19/2013 9:39 AM	Helen Jones		
• 17		Presentations	9/19/2013 9:39 AM	Helen Jones		
 Manufacturing 		Pricelists	9/19/2013 9:39 AM	Helen Jones		
 Marketing 		Reports	9/19/2013 9:39 AM	Helen Jones		
 Sales 		🚉 Sales Tools	9/19/2013 9:39 AM	Helen Jones		
Site Assets		David Jackson 000ct13	10/0/2013 11-37 AM	David Jackson		

When you enter a term and press **Enter**, or click the magnifying glass icon, your web browser launches and the search results for the site display.

Because this search yields results from your SharePoint server, this feature is only supported when you are connected to your server. When you are offline, this function will not work.

VIEWING, EDITING, AND CREATING NEW CONTENT IN BRIEFCASE (WINDOWS EXPLORER INTERFACE)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Briefcase interface.

NOTE: If you have set certain SharePoint locations as upload-only in Email Manager, the content of those locations is not available to you when offline.

х 🕞 🕞 🗢 🕅 « Colligo Portal 🔸 Shared Documents 🕨 ✓ 4→ Search Shared Documents Q Organize 🔻 📰 🕶 🔳 ? 💻 Computer Name Modified SOOTCAMP (C:) **Briefings** 2/2/2012 9:02 AM 🚑 DVD RW Drive (D:) SPC 2011 Presentations 9/30/2011 12:18 PM Macintosh HD (E:) 🖳 acme quote 2003.docx 8/15/2012 3:27 PM Removable Disk (F:) ACME Quote-Word 2003.doc 1/17/2013 9:54 AM 🚑 DVD Drive (G:) ACME Quote-Word 2007.docx 10/25/2012 2:14 PM Colligo Briefcase 10/16/2012 9:36 AM 👫 arma.png 🔼 Colligo Portal 🔄 brandenburger-tor-berlin_344.jpg 4/18/2012 12:00 PM Customized Reports Briefcase_Release Notes_3.0.docx 8/14/2012 9:55 AM Form Templates 🖂 Colligo Marketing_29May12 12.48.03_BYOD S... 5/30/2012 11:14 AM **Shared Documents** 🖂 Colligo Networks_16Oct08 10.46.33_Get Work... 7/18/2012 10:35 AM 📴 Site Assets 🖂 Colligo Workgroup Edition Information Requ... 9/12/2012 9:52 AM 📴 Site Pages ColligoEMLog.csv 1/31/2013 2:25 PM 🔄 Style Library 🔀 contributor@colliao.com 28Nov08 10.39.45 ... 5/24/2012 11:37 AM 📬 Network 36 items

Offline locations display as follows:

Upload-only locations display as follows:

Colligo Portal > Shared Docur	ments 🕨	• 4 ₇	Search Shared Docume
Organize 🔻			
	Briefings	SPC 2011 Presentatio ns	

The following icons are overlaid on file type icons to indicate the following item statuses:

- Sync error: 🚾
- Sync pending:
- Checked out by me: 💼
- Checked out by another user: 🔤
- Declared Record:

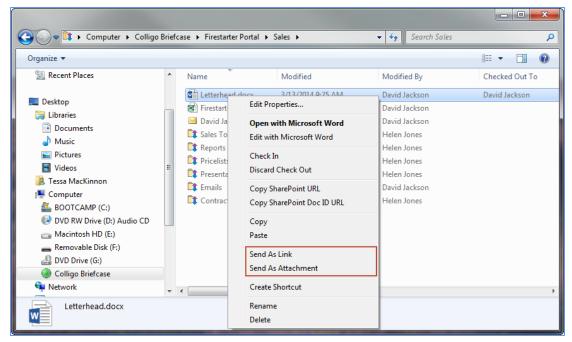
Viewing Content

To view an item in a library/folder, double-click it. It opens in the program native to the item type. You can then edit the item if preferred.

Emailing a Link or an Attachment

You can email a link to a SharePoint item or you can send the item as a physical attachment.

Choose either Send As Link or Send As Attachment from the contextual menu:



Creating a Shortcut to an Item

You can create a shortcut to any SharePoint item from the contextual menu:

♥ ♥ 🕅 ► Computer ► Colligo					
Organize 🔻					•
🕮 Recent Places	*	Name	Modified	Modified By	Checked Out To
-		Letterhead	docx 3/13/201/L0-25 AM	David Jackson	David Jackson
Desktop	_	Firestart	Edit Properties	David Jackson	
Libraries Documents		🖂 David Ja	Open with Microsoft Word	David Jackson	
Music		🚺 Sales To	Edit with Microsoft Word	Helen Jones	
Pictures		🔯 Reports	Check In	Helen Jones	
Videos	=	🔯 Pricelist	Discard Check Out	Helen Jones	
Tessa MacKinnon		📬 Presenta	Discard Check Out	Helen Jones	
E Computer		Emails	Copy SharePoint URL	David Jackson	
BOOTCAMP (C:)		Contrac	Copy SharePoint Doc ID URL	Helen Jones	
🕑 DVD RW Drive (D:) Audio CD			Сору		
👝 Macintosh HD (E:)			Paste		
🚗 Removable Disk (F:)			Send As Link		
🔮 DVD Drive (G:)			Send As Link Send As Attachment		
igo Briefcase 🎯			Send As Attachment		
📬 Network	-	•	Create Shortcut		
Letterhead.docx			Rename		
W			Delete		

Editing Content

To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If another user has opened the document, edited it, and uploaded it to SharePoint, and you try to upload the same document with your changes, the following dialog displays:

Local Version	Server Version
Document	Document
StratMLFAQ20091027.doc Microsoft Word 97 - 2003 Document 74.0 KB (75,776 bytes)	StratMLFAQ20091027.doc Microsoft Word 97 - 2003 Document 74.0 KB (75,776 bytes)
Open Wicrosoft Word	Open Wicrosoft Word
Folder	Folder
i	i
Properties	Properties
Content Type: Demo Document 💌	Content Type: Demo Document
Name *	Name *
StratMLFAQ20091027.doc	StratMLFAQ20091027.doc
Title	Title
StratMLFAQ20091027.doc	StratMLFAQ20091027.doc
Correspondence List Audio Visual	Correspondence List Audio Visual
Defence + Justice + Custodial	Defence + Justice + Custodial
Apply Revert	Apply Revert
Last Update	Last Update
Editor: Tessa MacKinnon Modified: 07/09/2011 5:12:31 PM	Editor: Tessa MacKinnon Modified: 07/09/2011 5:13:25 PM
Choose Local Version Merge	Versions Choose Server Version

You can click **Open** to view the edits in each version, and then click one of the following options:

- **Choose Local Version**: if you choose this option, the version on your local machine overwrites the current version on SharePoint
- Merge Versions: If you choose this option, a wizard displays and walks you through a process to choose the changes you want to keep or discard
- **Choose Server Version**: if you choose this option, the version on SharePoint does not change; you are effectively discarding your version

Editing Item Properties

To edit the properties of an item:

1. Right-click the item and choose Edit Properties:

★ Favorites Name Modified Modified By Author ■ Desktop □ Logos 9/19/2013 10:36 AM David Jackson ■ Downloads □ firest □ di Jackson □ di Jackson ■ Dropbox □ firest □ Edit Properties □ di Jackson □ Dropbox □ firest □ Edit with Paint □ d Jackson □ Desktop □ firest □ Edit with Paint □ d Jackson □ Desktop □ firest □ Check Out □ d Jackson □ Documents □ firest □ Copy SharePoint URL □ d Jackson □ Music □ Pictures □ Heler □ Copy □ Copy						
Favorites 9/19/2013 10:36 AM David Jackson Desktop firest Edit Properties id Jackson Downloads firest Edit Properties id Jackson E Desktop firest Edit with Paint id Jackson Desktop firest Edit with Paint id Jackson Desktop firest Edit with Paint id Jackson Documents firest Copy SharePoint URL id Jackson Music Heler Copy Copy		restarter Portal 🕨	viarketing F Graphics F	• • Search Graphics	•== •	
Paste Tessa MacKinnon Paste Computer Send As Link BOOTCAMP (C:) Send As Attachment DVD RW Drive (D:) Audio CD Create Shortcut	 Desktop Downloads Dropbox Recent Places Desktop Libraries Documents Music Pictures Videos Tessa MacKinnon Computer BOOTCAMP (C:) 	E Logos	9/19/2013 10:36 AM Edit Properties Open with Windows Photo Viewer Edit with Paint Check Out Copy SharePoint URL Copy SharePoint Doc ID URL Copy Paste Send As Link Send As Attachment	David Jackson d Jackson	Author	

The Edit Properties dialog displays.

2. Edit as preferred and click Close.

The changes are uploaded to SharePoint the next time the list/library is synchronized.

Checking Items In or Out

To check an item in or out, right-click it and choose **Check Out/In**. The **Check In** option only displays if you have previously checked the item out.

Once you have checked an item out, the Check Out icon is overlaid on top of the document type icon, so users can see that the item is being edited:

After you have checked the item out, you can open it, edit it, and then check it back in to the list/library. The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If you try to check out an item that has been modified in SharePoint and not synchronized, the following message displays:

Check Out Item(s)		×
The operation completed with errors.		
Item	Message	Description
😣 Colligo Style Sheet.docx	Version Mismatch	The version of the file on the server is different from the I
1		
	Clo	ise

Close the dialog, synchronize the site so you have the most up-to-date version of the document, and then perform the **Check Out** operation again.

To avoid the above conflict, select the combined check-in and sync option as described in **Setting Synchronization Options**.

Renaming Items

To rename an item:

- 1. Right-click it and select **Rename**.
- The item name becomes editable. Edit as preferred, and press Enter to complete the change. The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot rename an item if it is checked out by another user. If the item is checked out, a red **Check Out** icon displays on the item.

Deleting Items

To delete an item, right-click it and select **Delete**.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot delete an item if it is checked out by another user. If the item is checked out, a red check-out icon displays on the item.

Creating New Content

In addition to editing existing content in SharePoint, you can also add new content to your synchronized lists and libraries.

You can add items in the Windows Explorer extension of Briefcase in one of the following ways:

- Add a new document from within the Briefcase Windows Explorer interface
- Upload existing content
- Drag-and-drop or copy-and-paste content
- Use the File > Save As command

Adding a New Document to a List/Library

From within Windows Explorer, you can create and add a new document to a SharePoint location:

1. From the **File** menu, choose **New > New Document**:

e <u>E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp New	New Docu	ment				
Upload Documents	New Folde		*		Modified	
Create shortcut Delete		Briefings	Presentations		2/2/2012 9:02 AM 9/30/2011 12:18 PM	
Rename Properties			te 2003.docx ote-Word 2003.doc		8/15/2012 3:27 PM 1/17/2013 9:54 AM	
Close		💽 arma.png	ote-Word 2007.docx urger-tor-berlin_344.jpg		10/25/2012 2:14 PM 10/16/2012 9:36 AM 4/18/2012 12:00 PM	
🍰 DVD RW Drive (D:) 🧫 Macintosh HD (E:)		Briefcase_	Release Notes_3.0.docx arketing_29May12 12.48.03_B		8/14/2012 12:00 PM 8/14/2012 9:55 AM 5/30/2012 11:14 AM	
🕳 Removable Disk (F:) 🏭 DVD Drive (G:) 🎯 Colligo Briefcase	E	🖂 Colligo W	etworks_16Oct08 10.46.33_Get orkgroup Edition Information	n Requ	7/18/2012 10:35 AM 9/12/2012 9:52 AM	
 Colligo Portal Network 		Crossing t	pr@colligo.com_28Nov08 10.3 he Chasm to High User Engag	-	5/24/2012 11:37 AM 9/26/2012 12:16 PM	
Control Panel Recycle Bin		esk.jpg Excel file.x	lsx		8/22/2012 10:58 AM 8/22/2012 3:35 PM 8/22/2012 11:02 AM	
鷆 Keygen		Ianton im	age ing		8/13/2012 11:02 AM	

NOTE: if you cannot see the File menu, press Alt key to display it.

Site Templates Other template
template
template
Please enter a name for this new document: New Document
Create Cancel

The Create New Document dialog displays:

- 2. Choose your document type from the **Site Templates** tab or the **Other** tab.
- 3. Enter a name for the document, and click **Create**.

The Edit Properties dialog displays.

Edit Properties		
Options		
Content Type: Document	Ŧ	
Properties		
Name	Value	
* Name	New Document	.docx
Title		
Description		r v

- 4. This dialog is where you can record information about the document. Edit as preferred.
- 5. Click **OK**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

From within Windows Explorer, you can upload existing documents to your preferred SharePoint location:

1. From the File menu, choose Upload Documents:

e <u>E</u> dit <u>V</u> iew <u>T</u> ools <u>H</u> elp New				-
		Name	Modified	
Upload Documents		Name	Modified	
Create shortcut		🛱 Briefings	2/2/2012 9:02 AM	
Delete		SPC 2011 Presentations	9/30/2011 12:18 PM	
Rename		🖭 acme quote 2003.docx	8/15/2012 3:27 PM	
Properties	_	🛃 ACME Quote-Word 2003.doc	1/17/2013 9:54 AM	
		ACME Quote-Word 2007.docx	10/25/2012 2:14 PM	
Close BOOTCAMP (C:)		💽 arma.png	10/16/2012 9:36 AM	
BOUTCAMP (C:)		🔄 brandenburger-tor-berlin_344.jpg	4/18/2012 12:00 PM	
Macintosh HD (E:)		Briefcase_Release Notes_3.0.docx	8/14/2012 9:55 AM	
Removable Disk (F:)		🖂 Colligo Marketing_29May12 12.48.03_BYOD S	5/30/2012 11:14 AM	
BVD Drive (G:)	=	🖂 Colligo Networks_16Oct08 10.46.33_Get Work	7/18/2012 10:35 AM	
Colligo Briefcase		🖂 Colligo Workgroup Edition Information Requ	9/12/2012 9:52 AM	
Colligo Portal		🖂 contributor@colligo.com_28Nov08 10.39.45	5/24/2012 11:37 AM	
Colligo Portal Setwork		🖭 Crossing the Chasm to High User Engagemen	9/26/2012 12:16 PM	
Control Panel		🔄 desk.jpg	8/22/2012 10:58 AM	
		🖾 Excel file.xlsx	8/22/2012 3:35 PM	
Recycle Bin		🛗 Keys.txt	8/22/2012 11:02 AM	
퉬 Keygen		Inton image ing	8/13/2012 4-21 PM	

NOTE: if you cannot see the File menu, press the Alt key to display it.

The **Upload Documents** dialog displays.

- 2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.
- 3. The Edit Properties dialog displays. Edit as preferred and click OK.

The document is added to the SharePoint location. If you have selected more than one document, any properties you assign apply to all items.

Dragging-and-Dropping Content

You can drag-and-drop one or more files or complete folder structures into File Manager from your desktop or from other directory locations:

- 1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in the Windows Explorer extension of Briefcase.
- 2. The Edit Properties dialog displays. Edit as preferred and click OK.

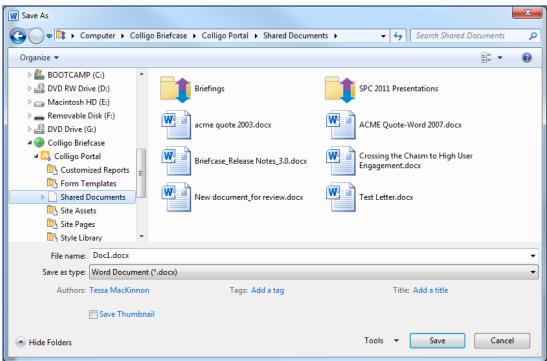
The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

You can also drag-and-drop content from the Windows Explorer extension to the stand-alone interface. This action is a copy and paste; cut is not supported in this feature.

Using the File Save As Command

You can use the **File > Save As** command from integrated programs to save directly into any of the SharePoint lists or libraries you have connected to Contributor File Manager:

- 1. In your open document, select File > Save As.
- 2. In the **Save As** dialog, navigate to your SharePoint location, edit the file name as needed, and click **Open**:



 The Edit Properties dialog displays. Edit as preferred and click Close. The document is added to the SharePoint location.

SETTING DEFAULT METADATA

If you want to tag all documents and items that you add or upload to a list or library with the same metadata, you can set default metadata values through the Briefcase interface:

1. From the File menu, choose Default Metadata Values.

The **Default Metadata Values** dialog displays:

Default Metadata Values				x
Contoso LLC Contoso LLC Contoso LLC Contoso LLC Contoso LLC Contoso Content Source Content Conte	Name	Value	Inherited From	Apply To
	Add			When adding documents, prompt for properties: C Always C Never C According to application global settings
	L			OK Cancel Apply

- 2. Select the site and library/list that you want to configure.
- 3. To add a metadata tag, click Add.

The **Add Default Metadata Properties** dialog displays, displaying the metadata field options that are set in the document library in SharePoint.

Add Default Metadata Properties	x
Description	*
Title	Ŧ
Propagate these default metadata values to subfolders	

- 4. Enter your preferred tags and click **Add**.
- 5. If you want the values to propagate to any subfolders, check the **Propagate these default meta-data values to subfolders** box.

- 6. To configure the behavior or the prompt to record document properties, choose a radio button on the right under the When adding documents, prompt for properties section:
 - Always
 - Never
 - According to application global settings