Contributor Pro 6.2

User Guide

Contents

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:
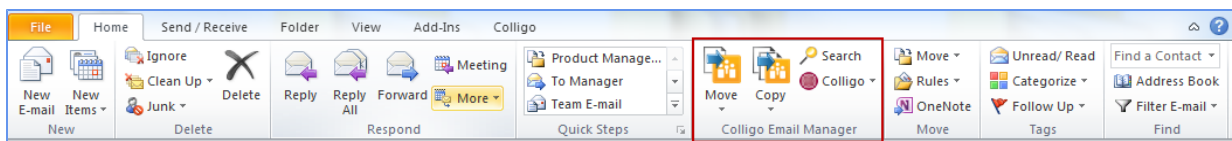
And in the Outlook folder tree:
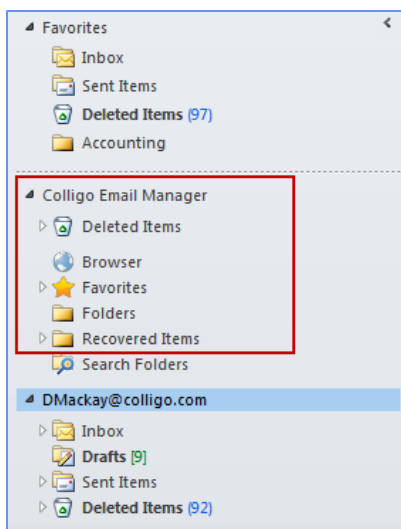
Colligo Briefcase Interface

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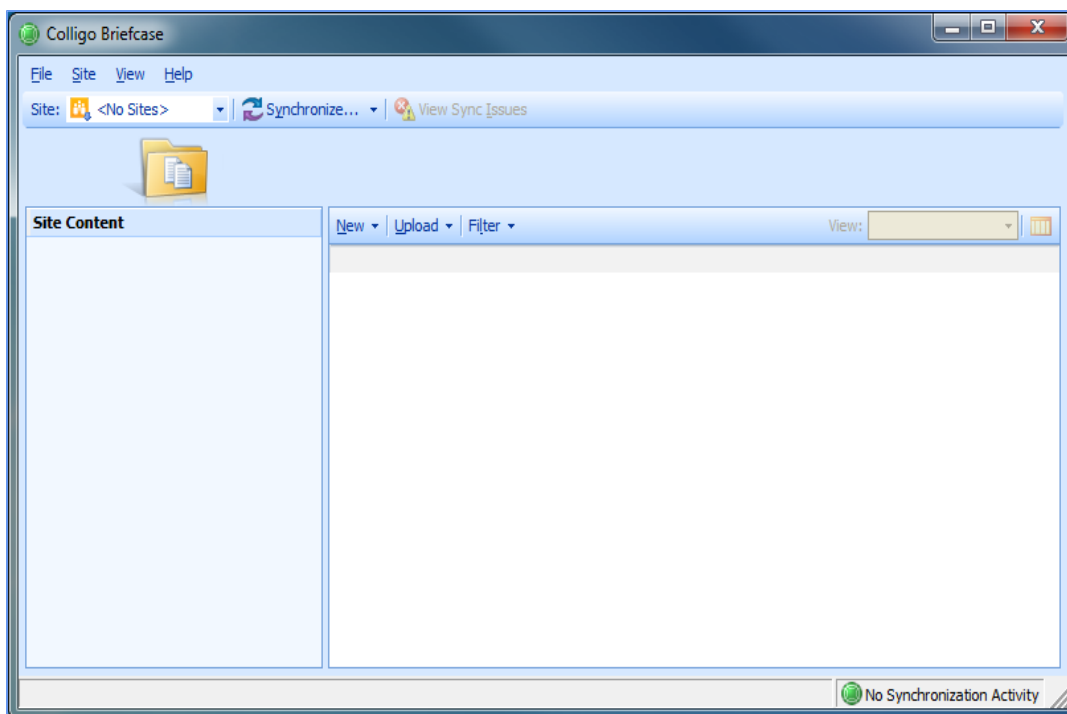
The Windows Explorer extension displays as Colligo Briefcase under the Computer node:
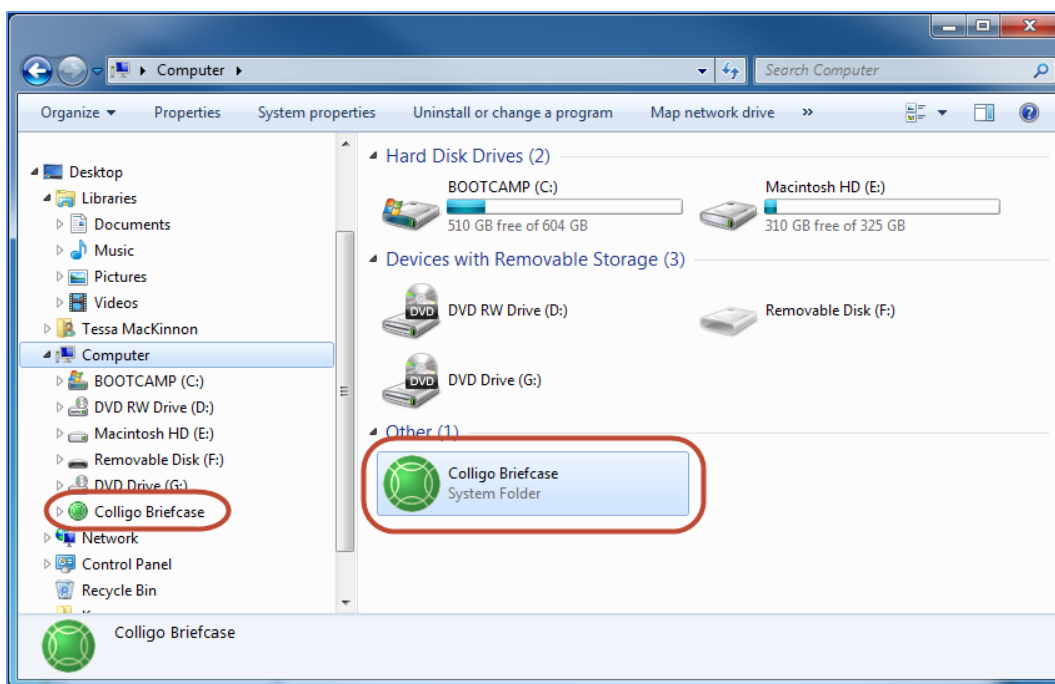
COLLIGO EMAIL MANAGER

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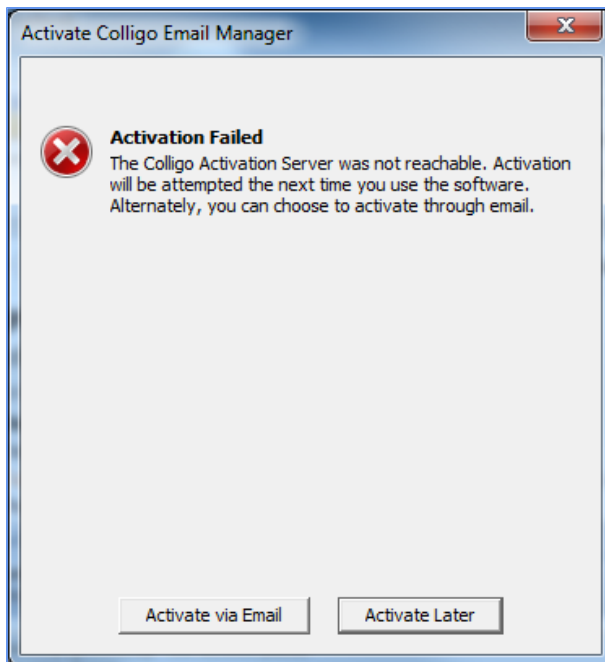
NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

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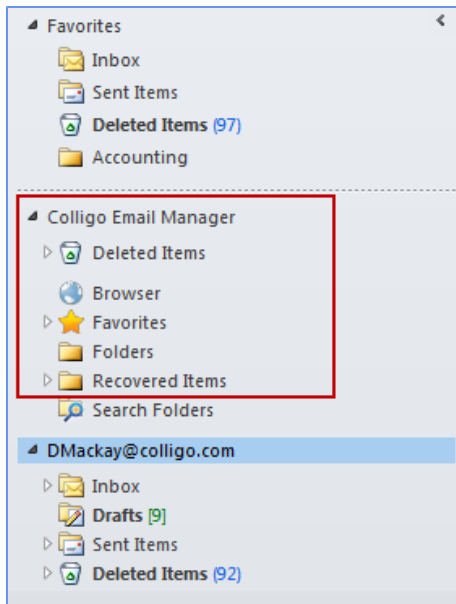
You can now add SharePoint sites and designate folder locations for your Favorites and Folders lists.

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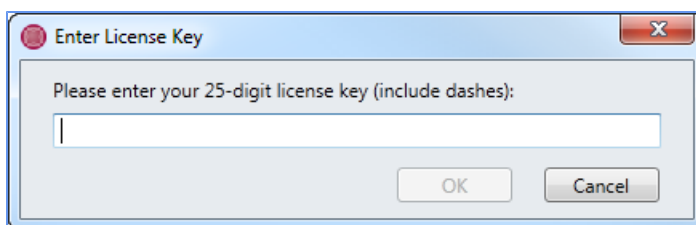
2. Enter your license key and click **OK**.

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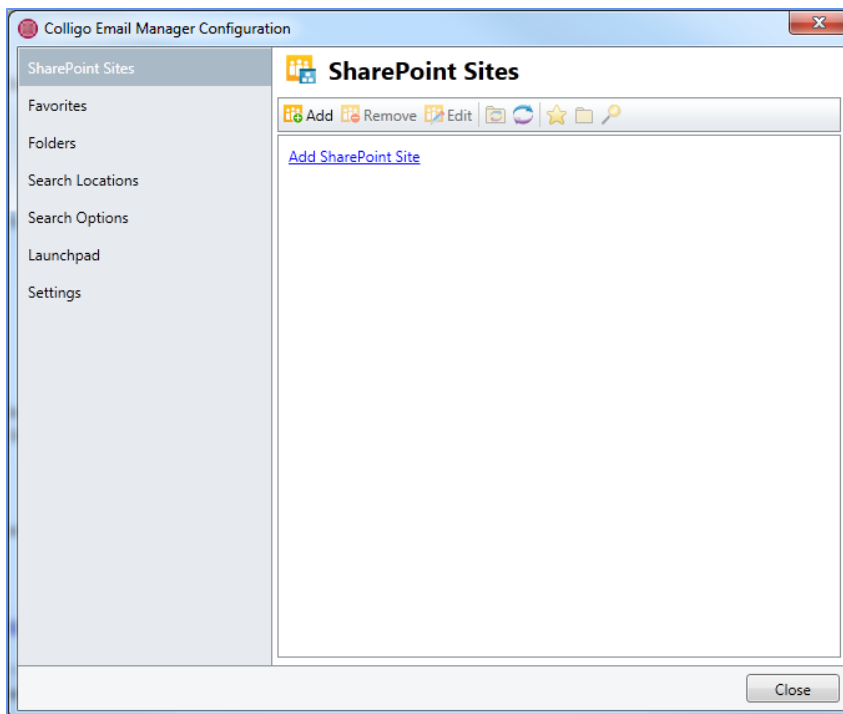
2. Click the **Add SharePoint Site** link or the **Add** icon.

   The **Add SharePoint Site** dialog displays:
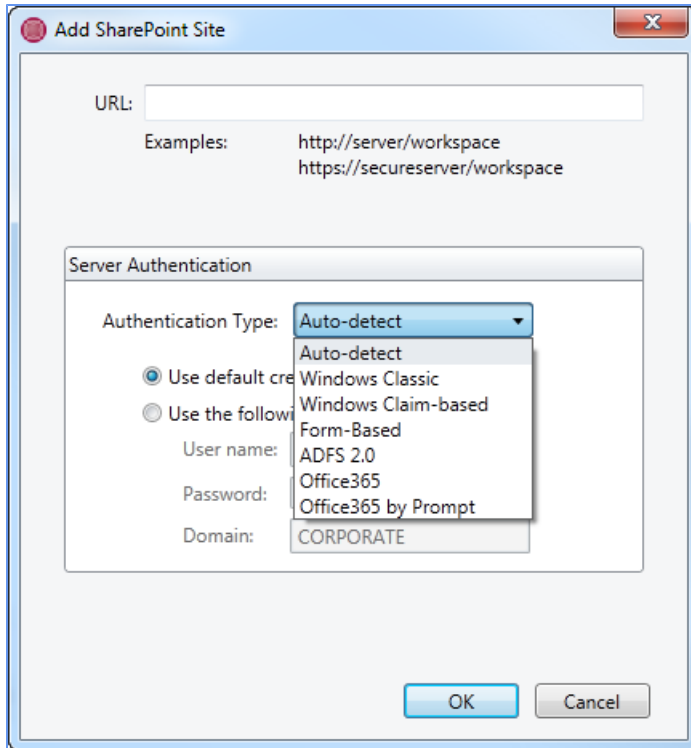
3. Enter the following information in the dialog:

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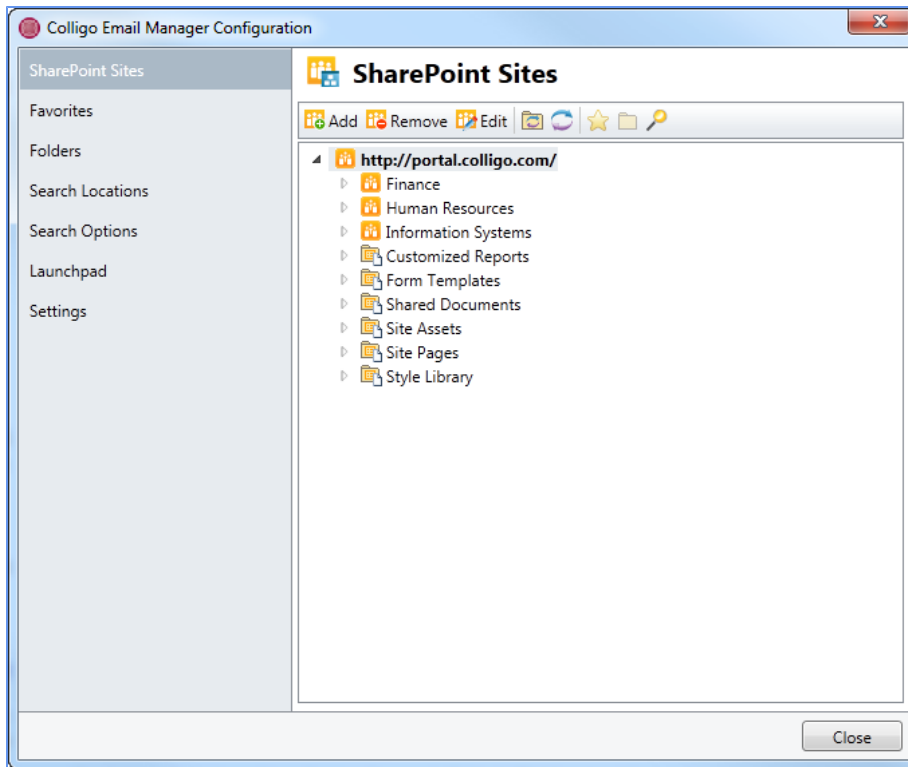
After adding your sites, you need to determine which libraries/folders are going to be upload-only or offline locations. For more information, see Setting Folders as Upload-only or Offline.

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:

1. 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:
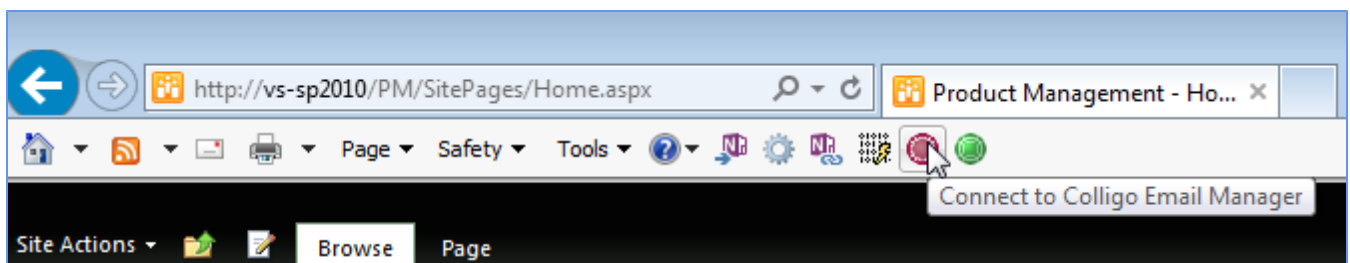
NOTE: If the **Connect to Colligo Email Manager** button is not visible, you need to enable the Command bar.

Internet Explorer 8:
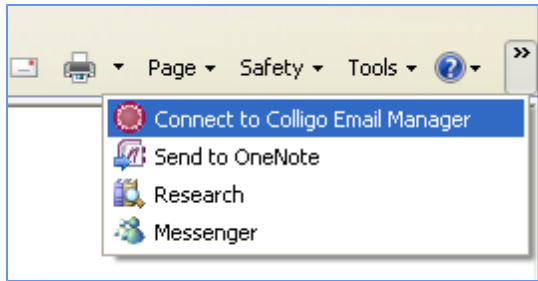
2. If you are logged in with your default credentials, you are not prompted for a username and password.

   If not, you are prompted for your login credentials with the **Connect to Outlook** screen:
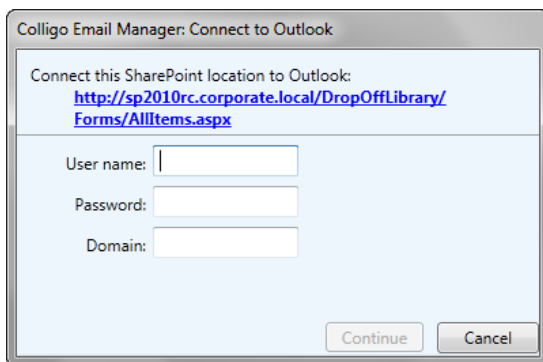
3. Enter your login information and click **Continue**.

   The following screen displays.
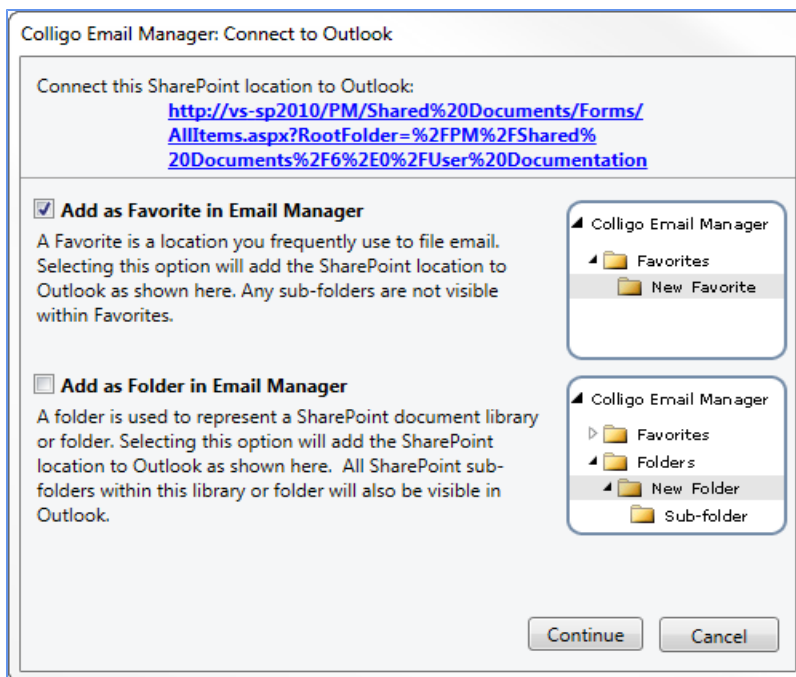
4. Check the **Add as Favorite in Email Manager** box to add the location to your Favorites list.

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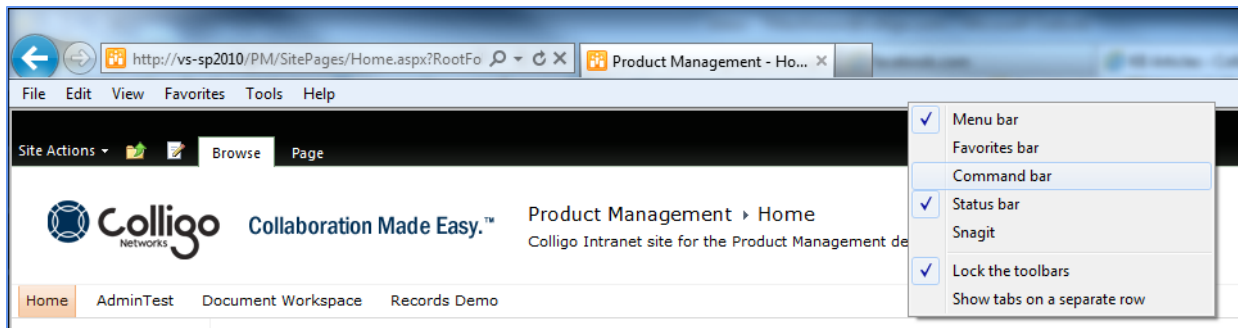
2. Select the **Command bar** option.

    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
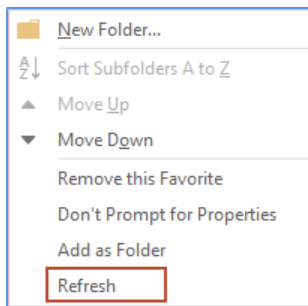
CONFIGURING LOCATIONS FOR EMAIL FILING

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.
2. 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**:
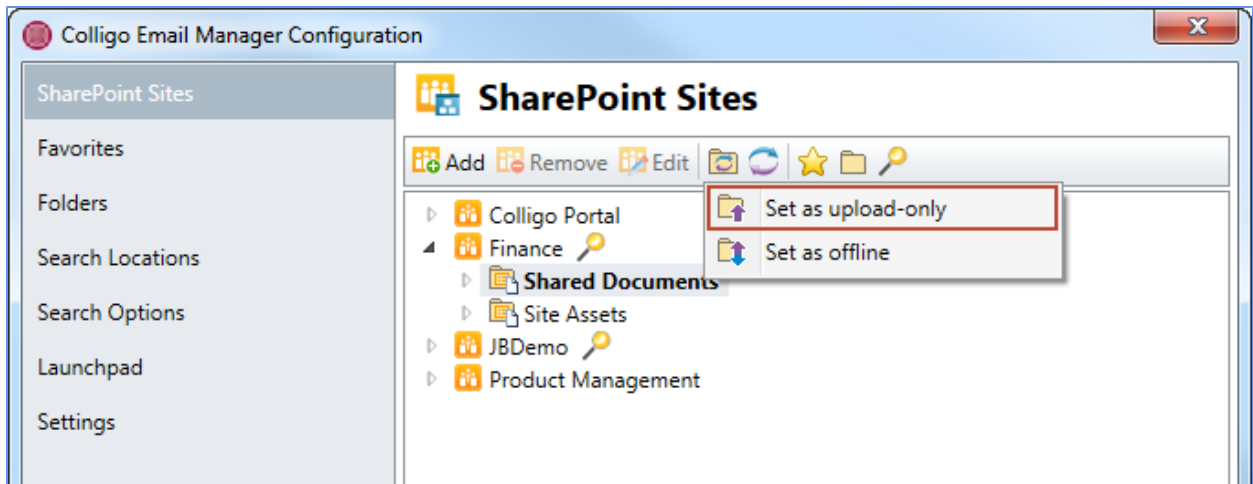
Setting a Location as Offline

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: [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 [icon] and select **Set as offline**:
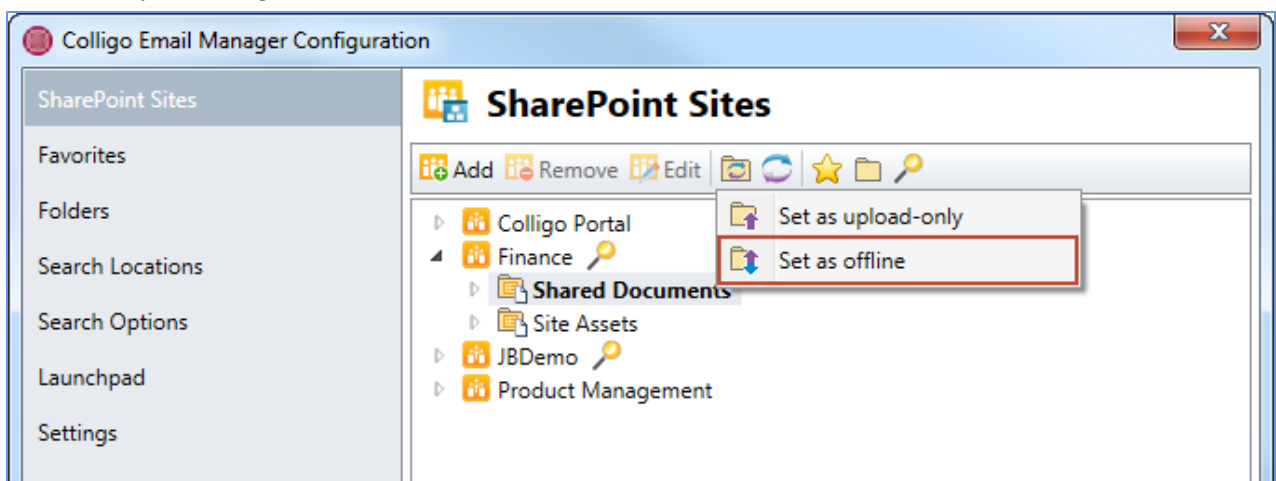
Making a SharePoint Location a Folder or Favorite

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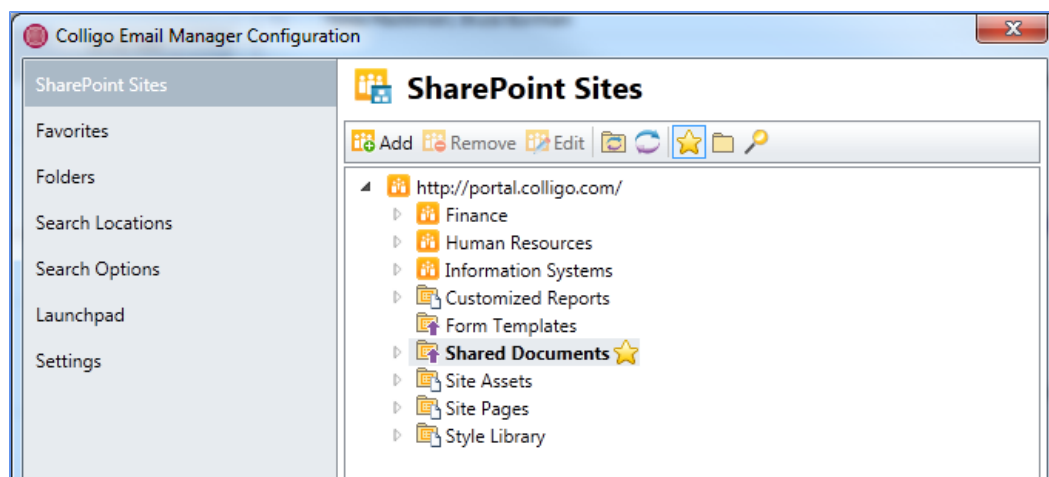
   NOTE: if a sync is in progress, you can close the Configuration window without cancelling the sync.

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:
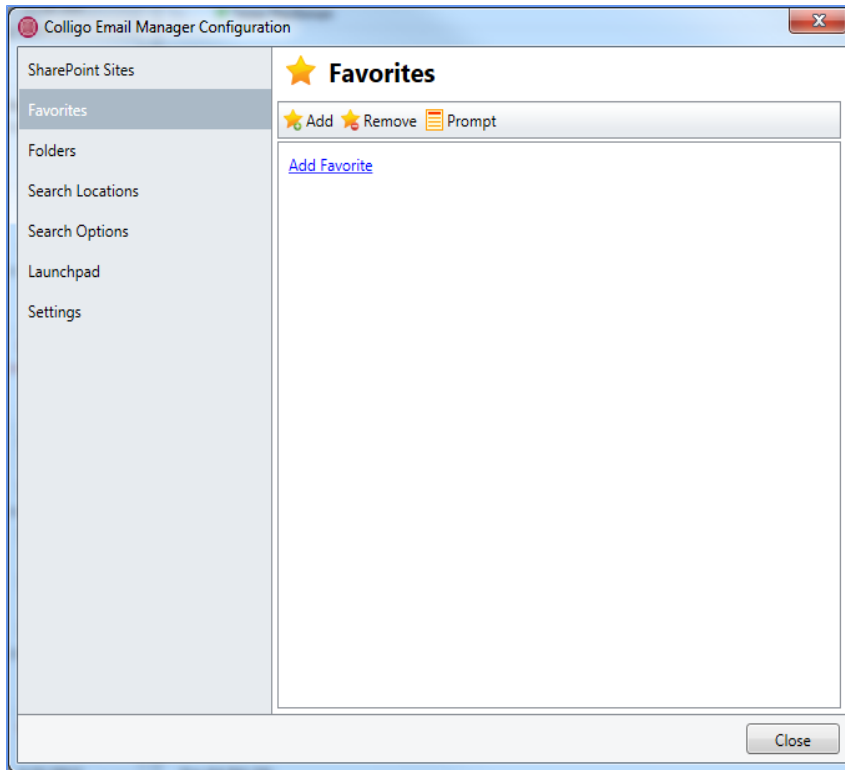
3. Click the **Add Favorite** link or the **Add** icon

   The **Add Favorite** dialog displays.
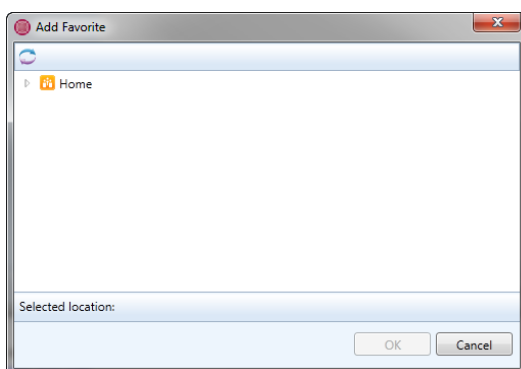
4. Browse to the location of the folder you want to add to your Favorites list, and click **OK**.

   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:
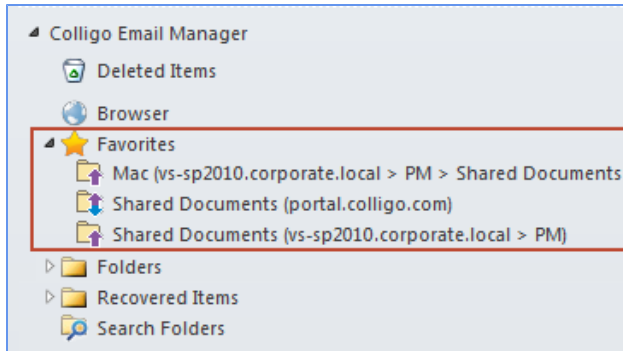
You can now use the folders to view, upload, and download your SharePoint files. Click on a folder to view its contents:
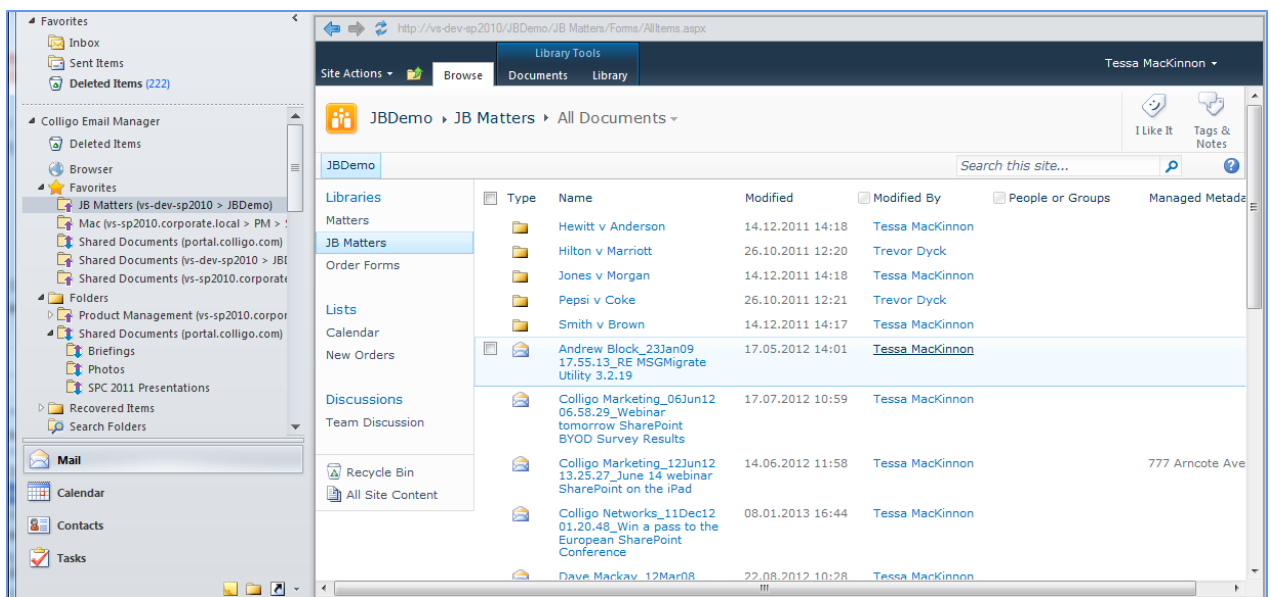
NOTE: you can also add a folder to your Favorites list by right-clicking on a folder under the Folders list and selecting **Add as Favorite** from the contextual menu:
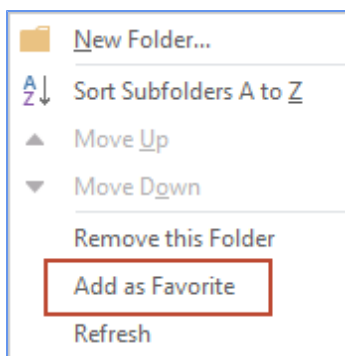
Prompting for Properties

For locations that you have added as Favorites, you have the option to turn the prompt for the **Edit Properties** dialog on or off:
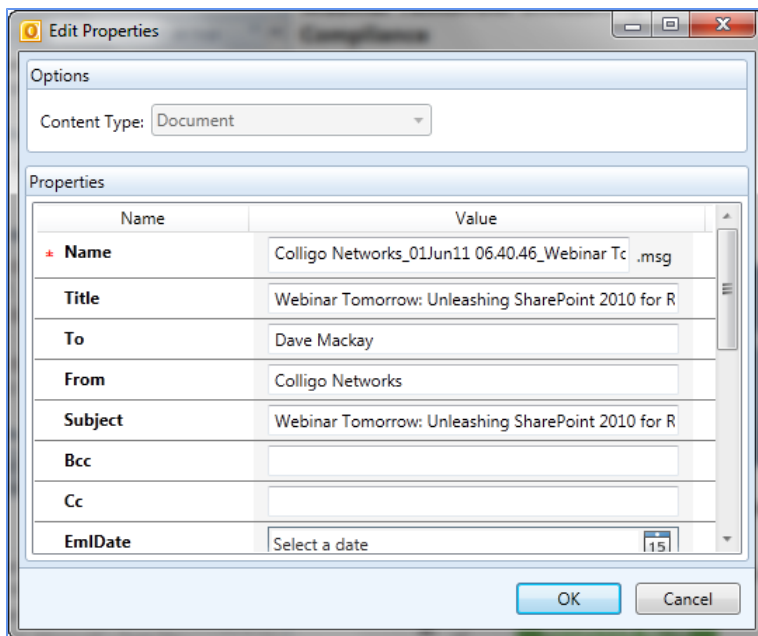
This prompt is enabled by default. You can turn it on or off in one of two ways:

- 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:
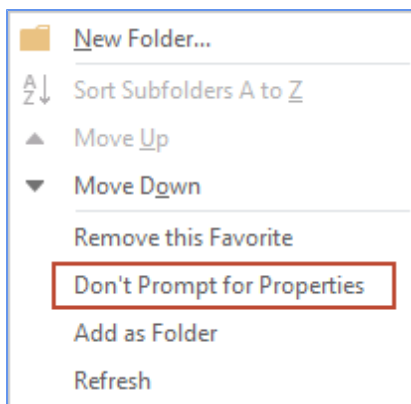
**Removing a Location from the Favorites List**

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:
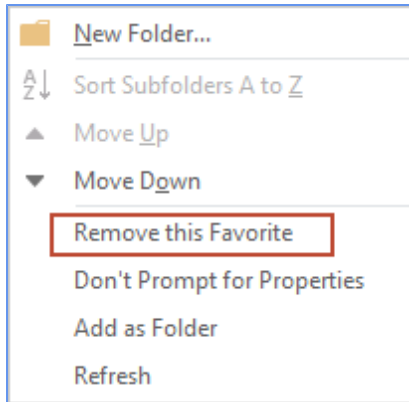
Adding a Location as a Folder

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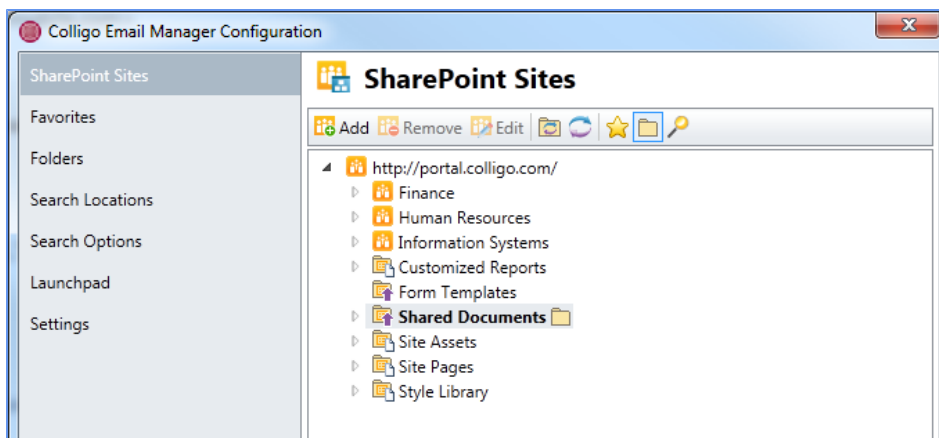
NOTE: if a sync is in progress, you can close the Configuration window without cancelling the sync.

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:
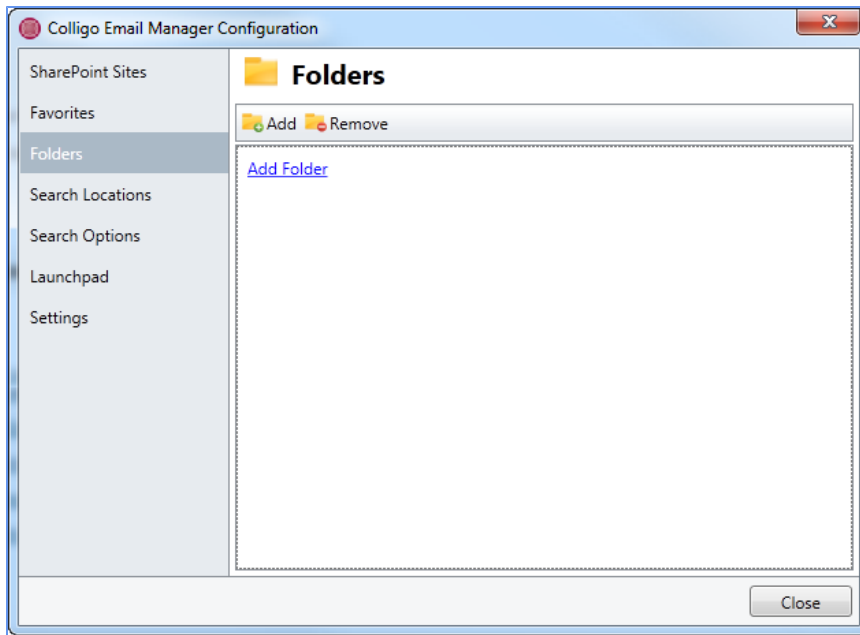
3. Click the **Add Folder** link or the **Add** icon.

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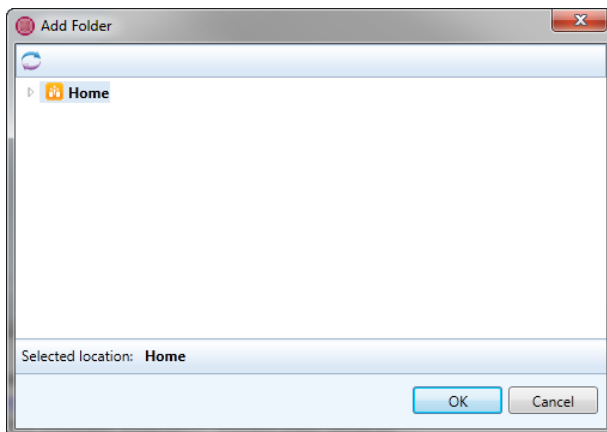
   NOTE: if you right-click **Folders** under the Colligo Email Manager list in Outlook, you can select **Add Folder** from the contextual menu and the above **Add Folder** dialog displays.

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:
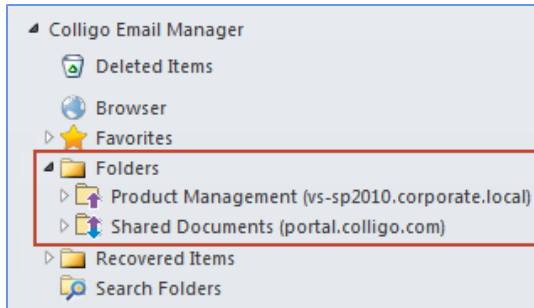
NOTE: you can also add a Folder by right-clicking on a folder under your Favorites list and selecting **Add as Folder** from the contextual menu:
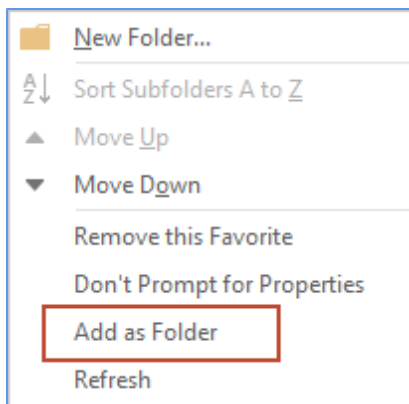
NOTE: as a best practice, it is recommended that you do not add folders with more than 50 subfolders to your Folders list, as they will take a long time to populate and refresh. If there is a top-level folder that has a number of subfolders to which you frequently file emails, it is recommended that 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:
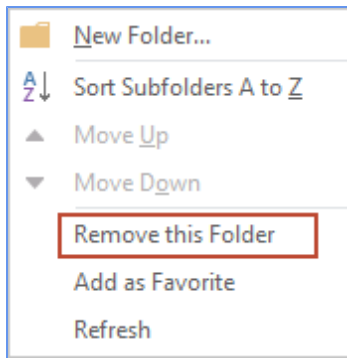
Viewing Upload-only Locations

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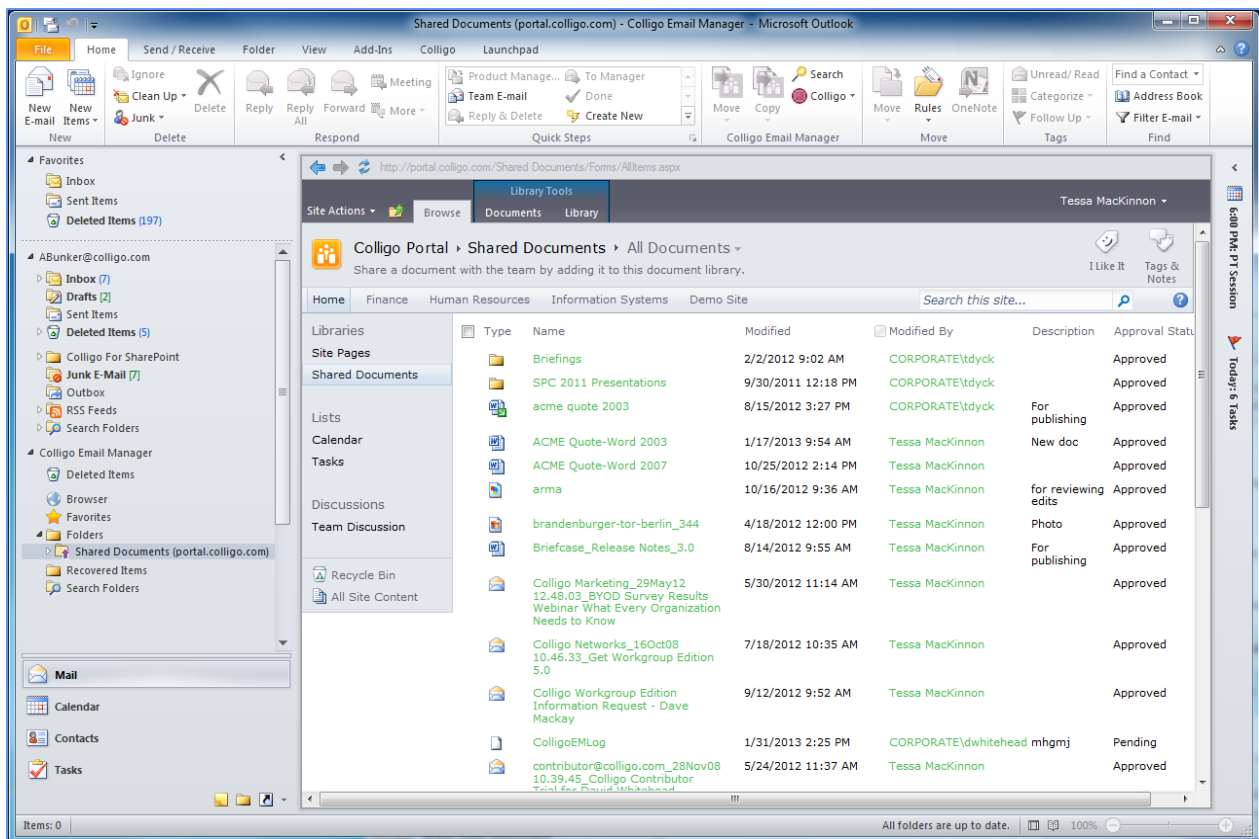
NOTE: for upload-only locations, you cannot view any content when you are offline.

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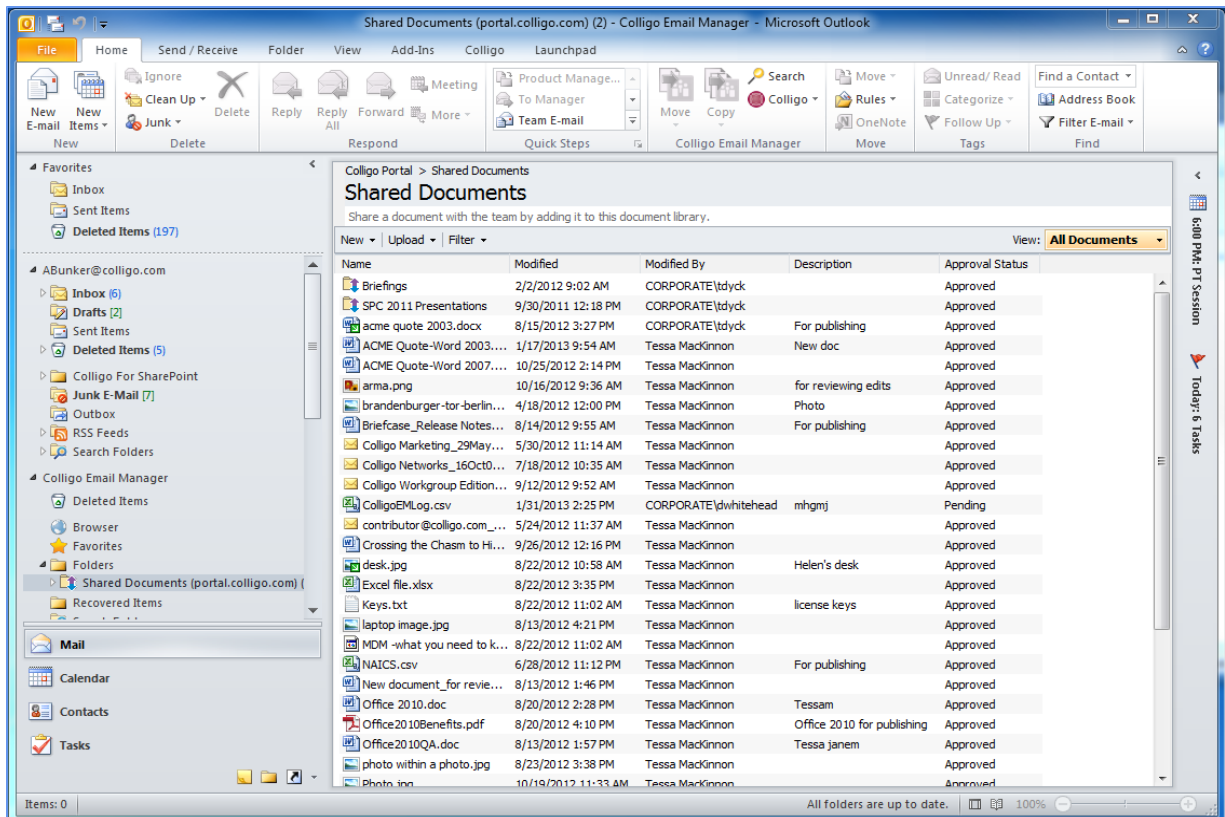
If a location is set as offline, you can open, view, and edit the content as you would if the content was online. The difference is that any changes you make are not reflected in the SharePoint site itself until you are connected to the SharePoint server again, and you synchronize the site.

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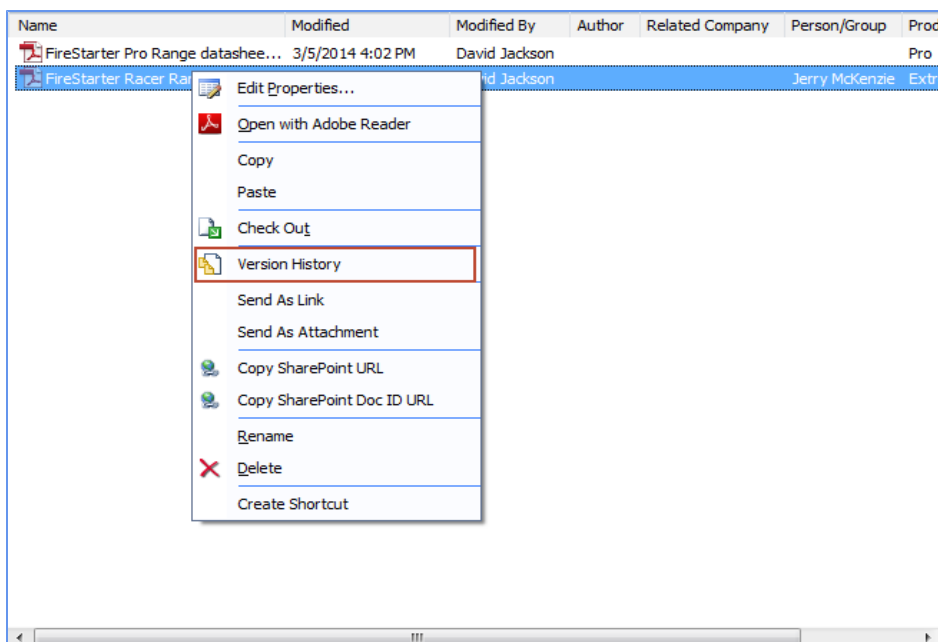
NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.

The **Version History** window displays:
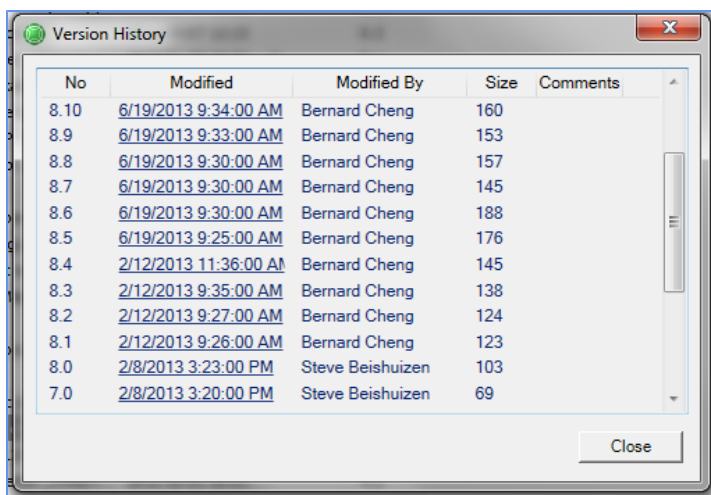
Click on a version number to open the SharePoint version of the item.

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:

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:

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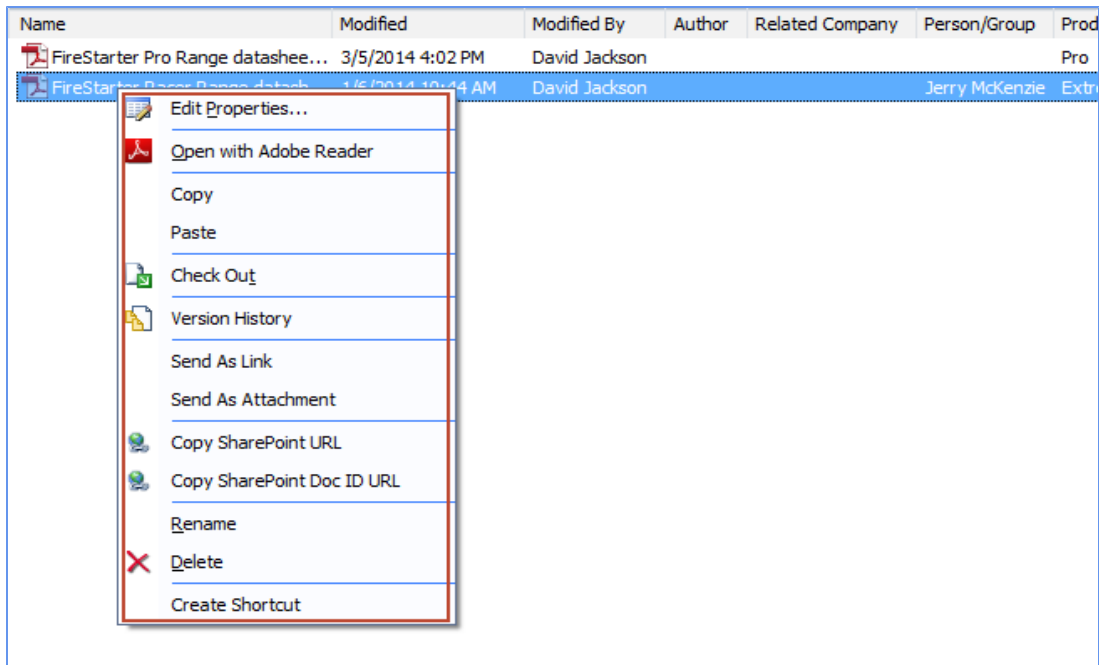
The experience of filing items to SharePoint in Email Manager is the same regardless of whether you are connected to your SharePoint server.

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 Managing Settings.

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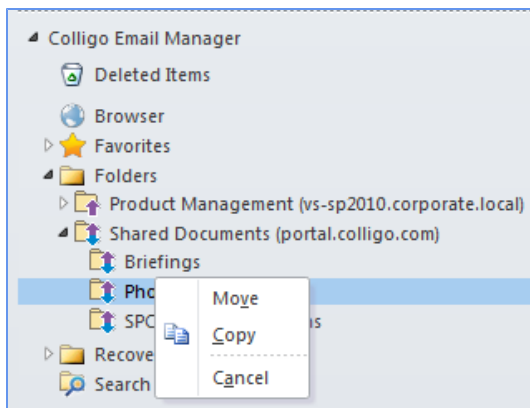
    NOTE: if you have a folder in your Folders list that has numerous subfolders that you have to scroll through to find the folder to drag-and-drop your email into, it is easier to use the **Move/Copy** buttons and use the filter feature to isolate the folder; see **Using the Move and Copy Buttons**.

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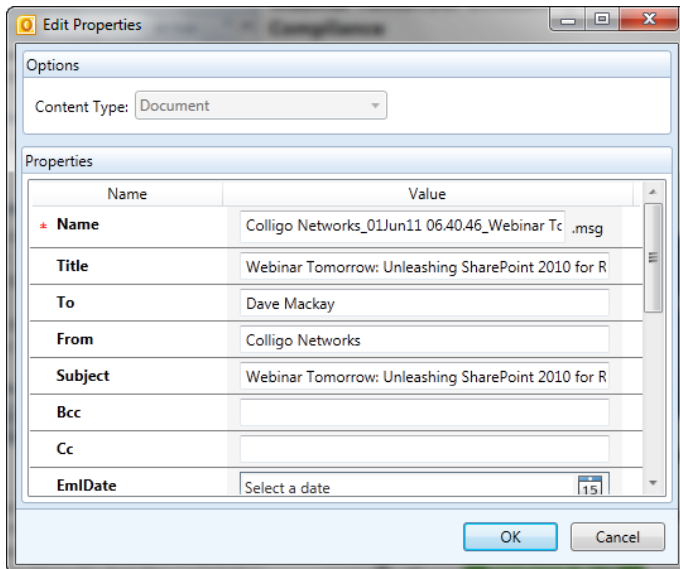
3. In the **Options** section, choose the **Content Type** from the drop-down menu.
4. In the **Properties** section, modify the fields as preferred.

   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:
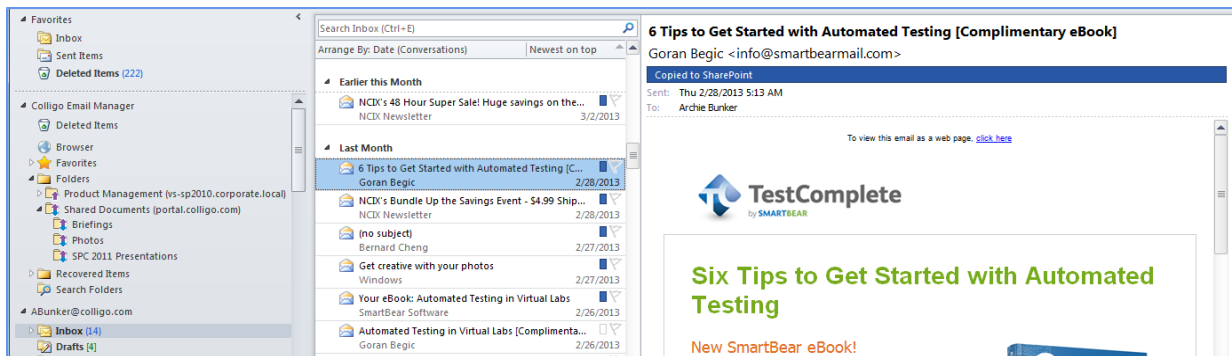
   To enable or disable this setting, see Managing Settings.

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:
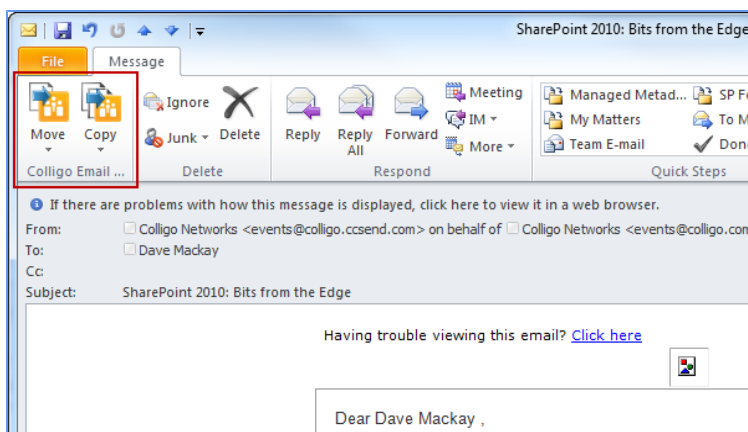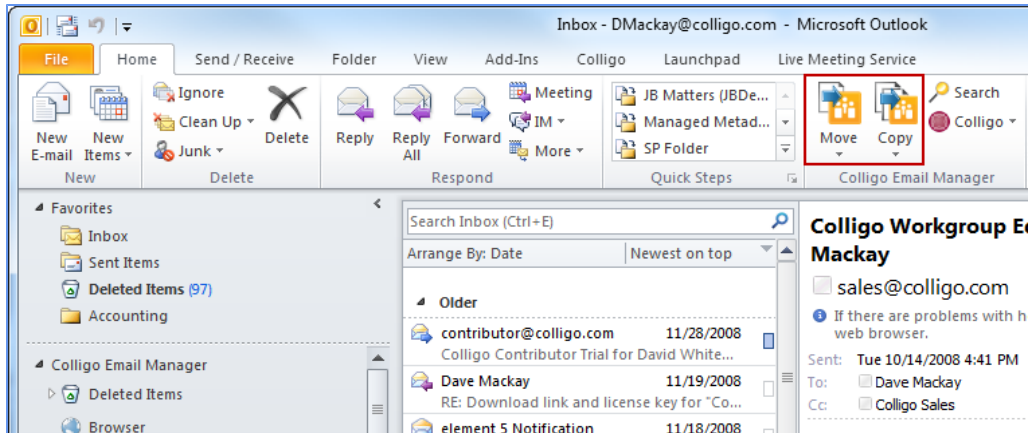
2. From the drop-down menu, choose the folder you want to move your email to:
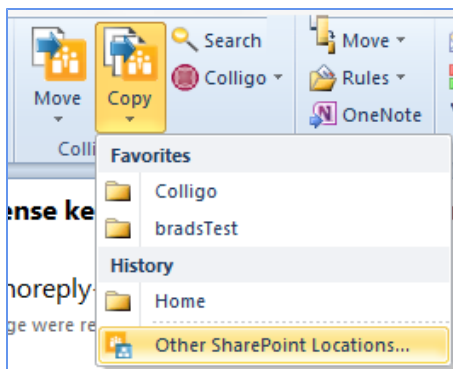
3. If the folder you want is not in your **Favorites** or **History** list, select **Other SharePoint Locations.**
   The **Select Move/Copy Destination** dialog displays:
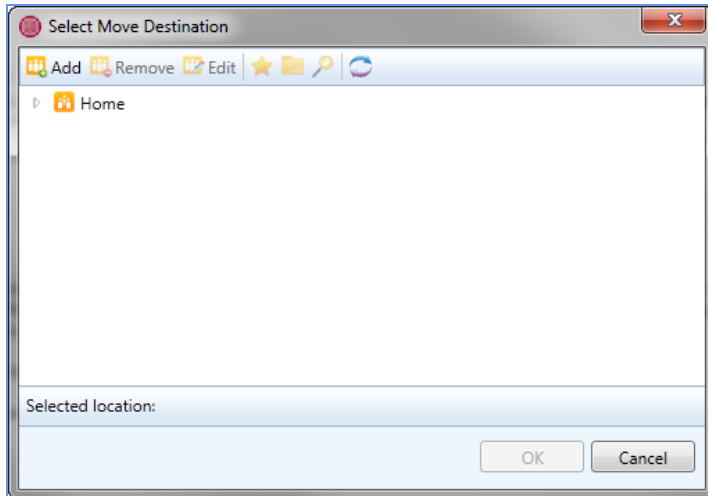
NOTE: When you are offline, locations that are not set to upload-only are greyed out. If you want to be able to file items to specific locations when offline, ensure that you set them as upload-only prior to going offline.

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:
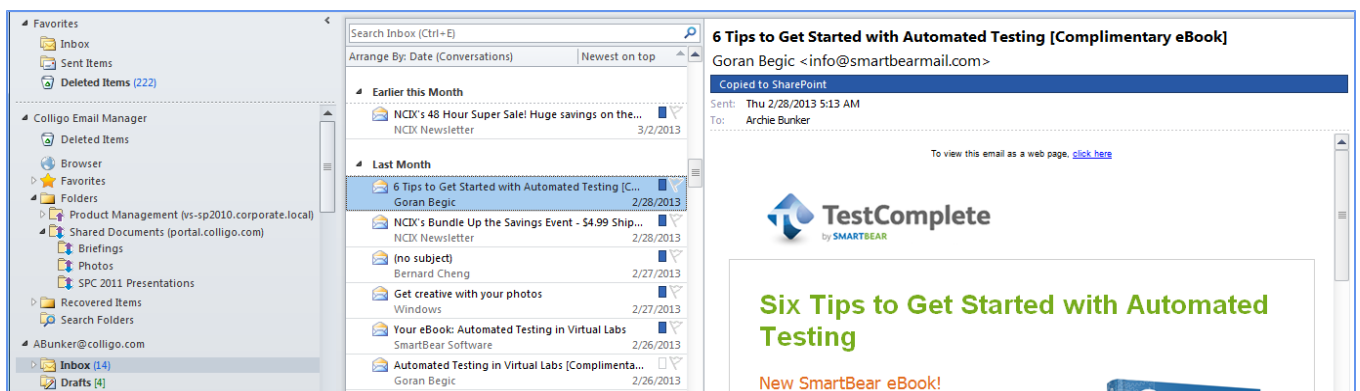
To enable or disable this setting, see Managing Settings.

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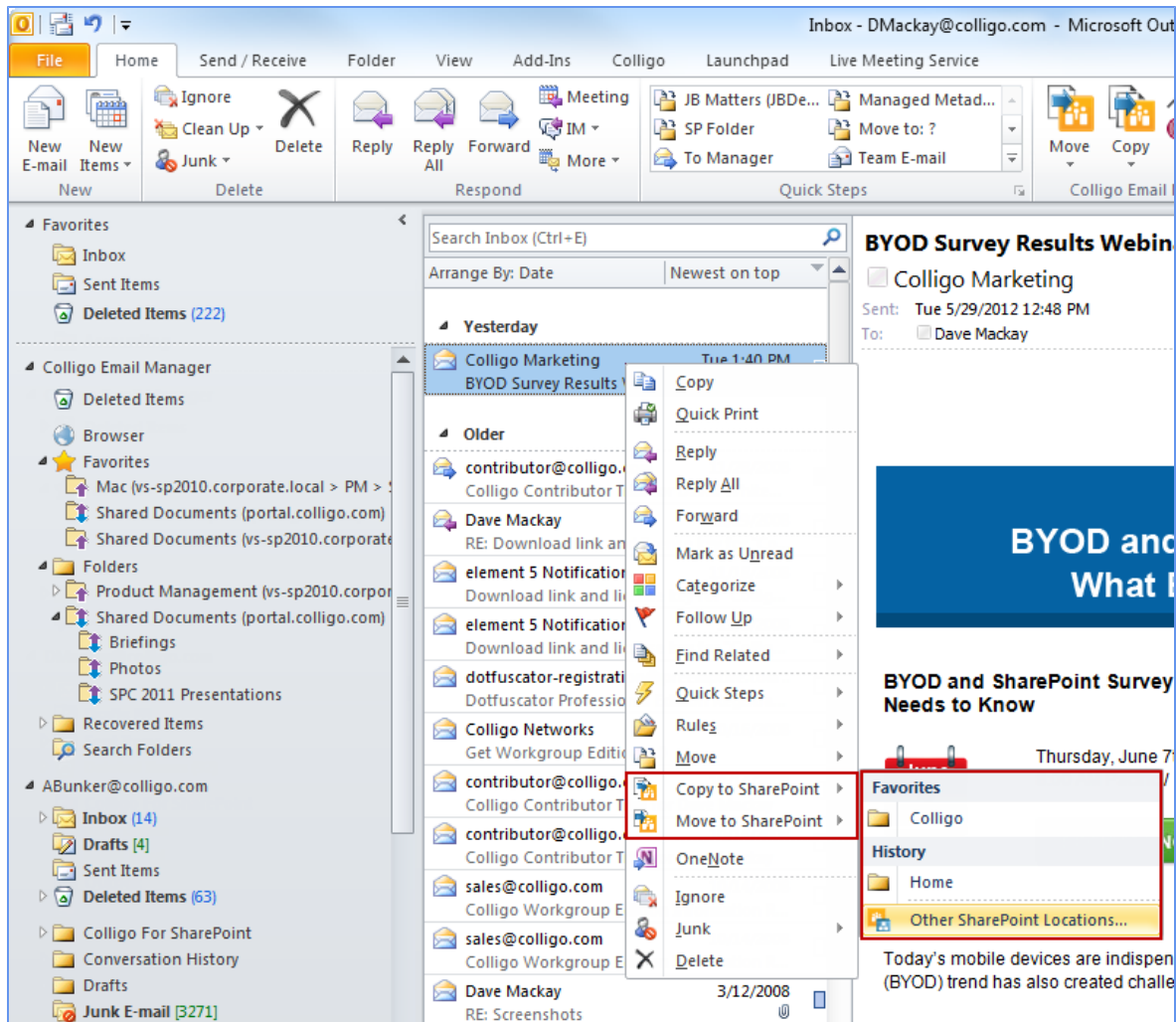
2. Choose a location from your **Favorites** or **History**, or choose **Other SharePoint Locations** to browse to any location in any of your sites.

   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:
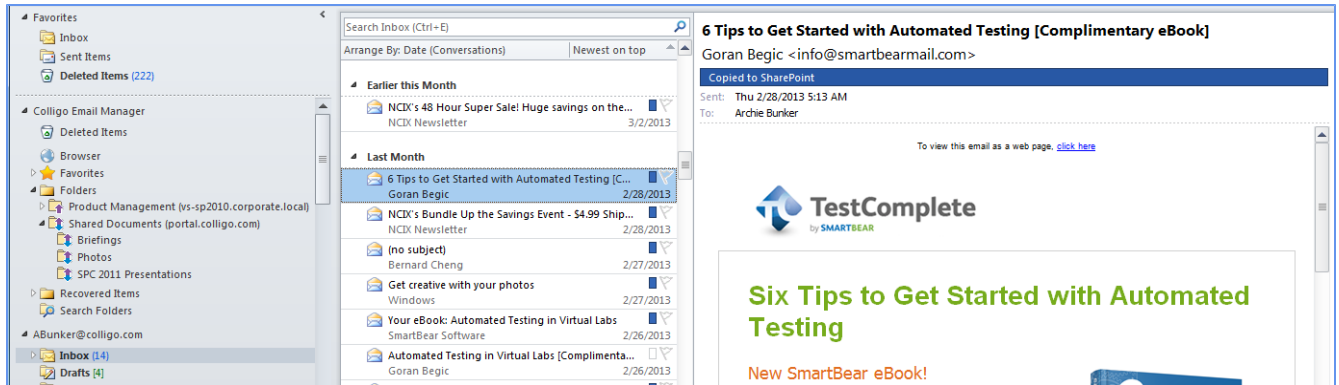
Moving or Copying Multiple Emails

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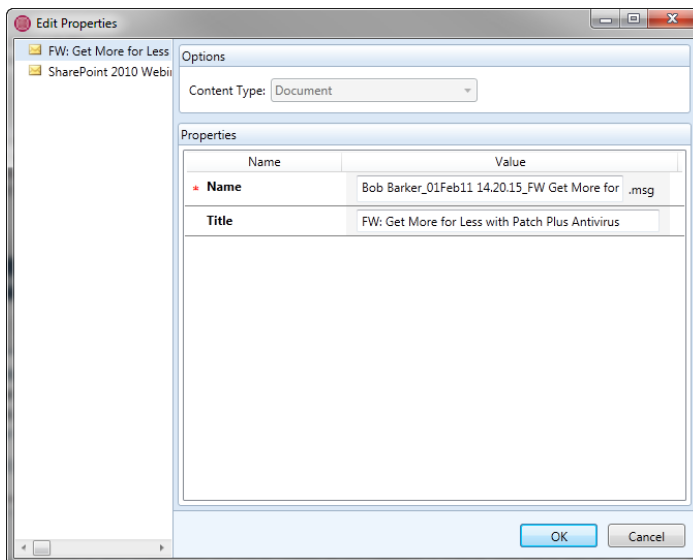
4. In the left pane, select the email and edit the **Content Type** and **Properties** as needed.

   See Using Managed Metadata for information about metadata fields.

   See Applying Metadata to Multiple Emails 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 Managing Settings.

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).
2. 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.
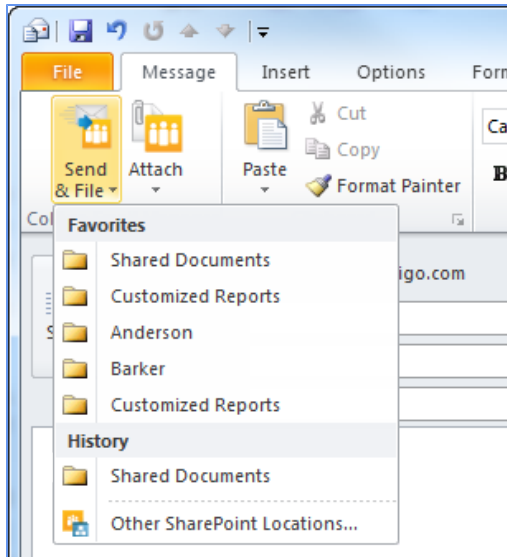
The **Edit Properties** dialog displays:
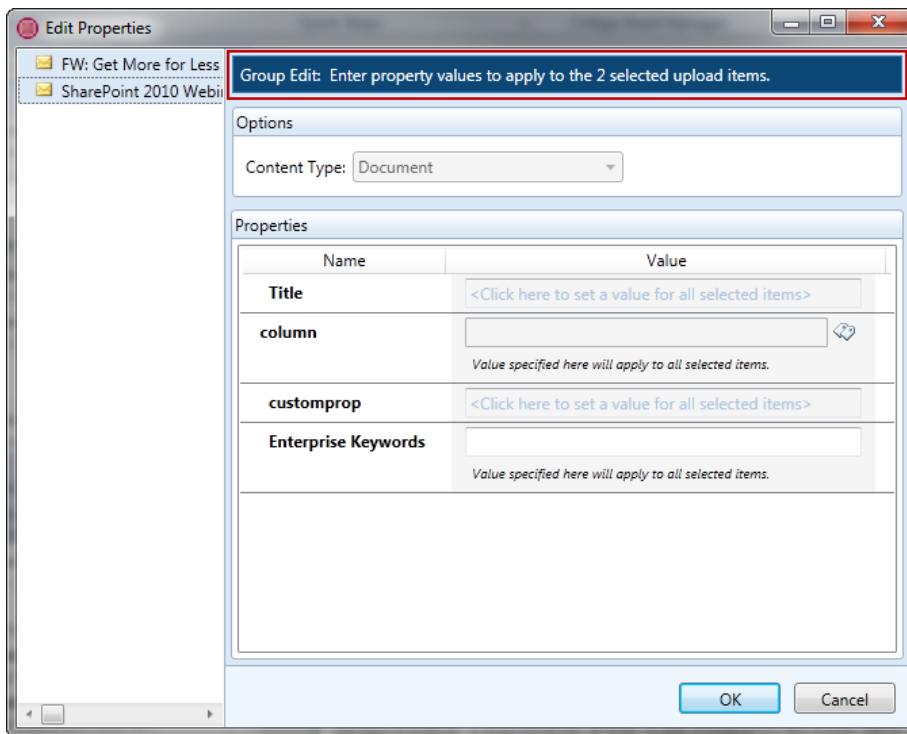
4. Press the **Ctrl** key and click to select the emails in the left column that you want to apply the same metadata to.

    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.
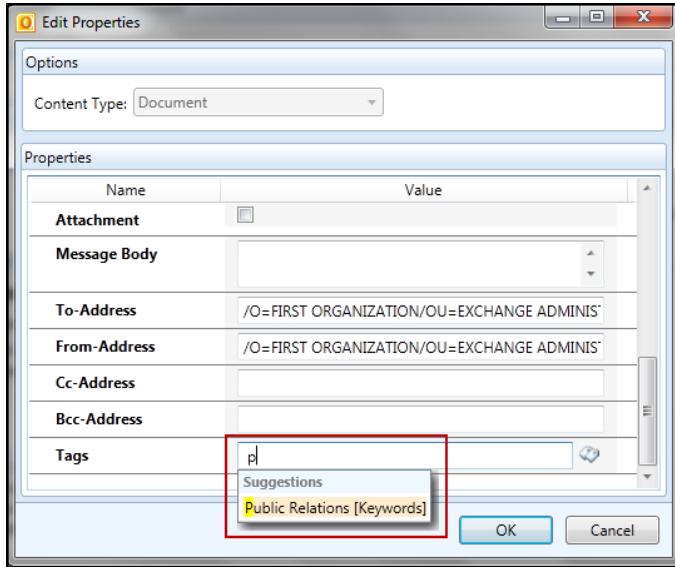
Selecting from a List of Metadata

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

   The **Select term(s)** dialog displays:
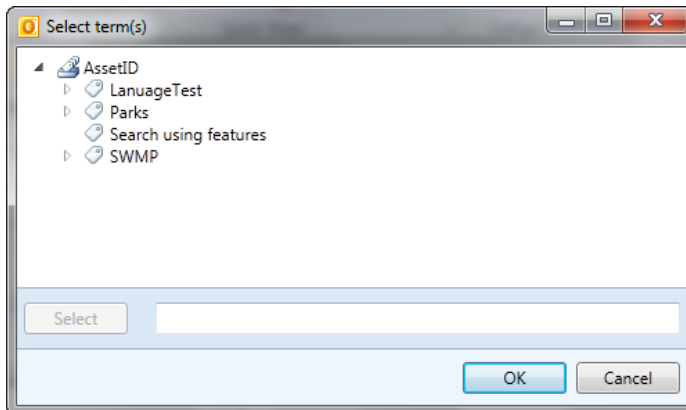
2. You can double-click a term to add it to the list of selected terms, or you can select the term and click **Select**.

   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 [icon].

   The following error message displays:

Person Single	e;	[icon] [icon]
	No exact match was found. Click the item(s) that did not resolve for more options.	
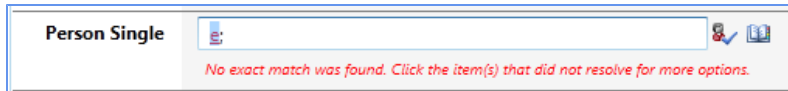
2. Click the item to display a drop-down menu of suggestions based on the letter(s) you entered:
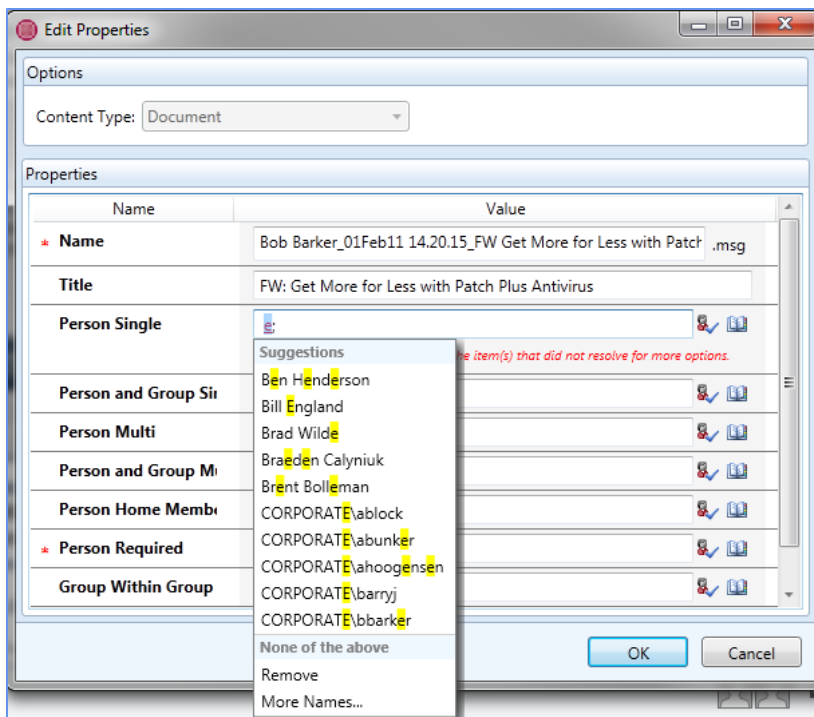
3. Select an item from the list to enter in the field, or enter new search letters.

Searching for a Person or Group Name

To search for a person or group name:

1. Click the address book icon [icon] to view the directory of your SharePoint people and groups. The **Search People** dialog displays:
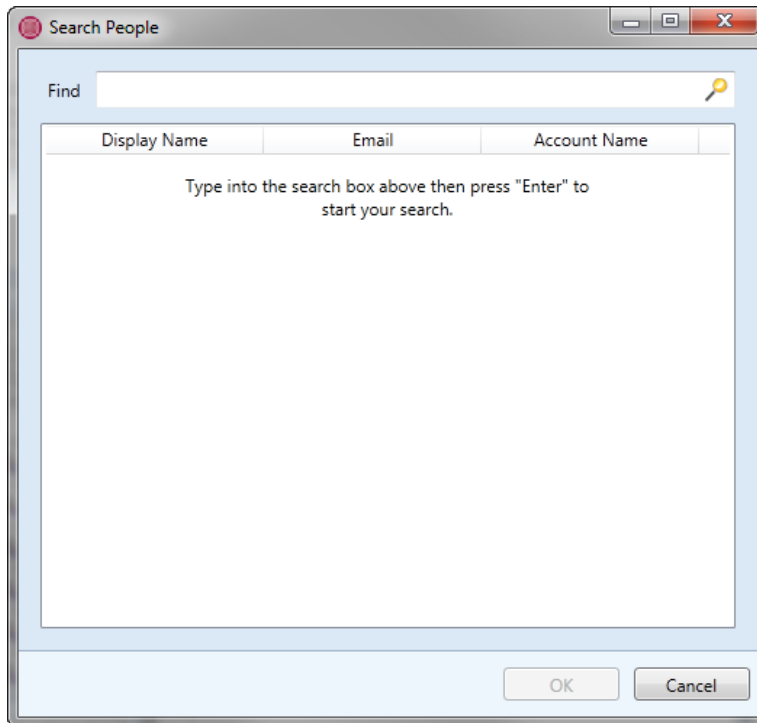
2. Click the search icon to display a complete list of all people and groups, or enter a name in the **Find** field and press **Enter** to search.
3. Select the person or group you want to add to the field and click **OK**.

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:

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 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:

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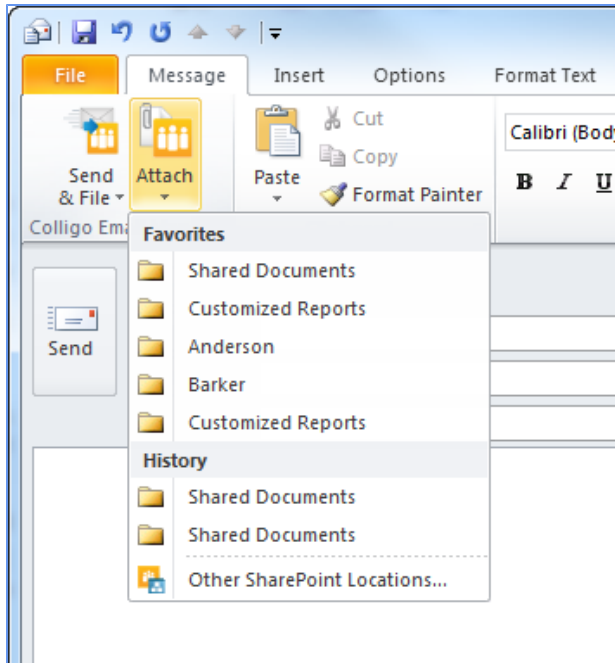
2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

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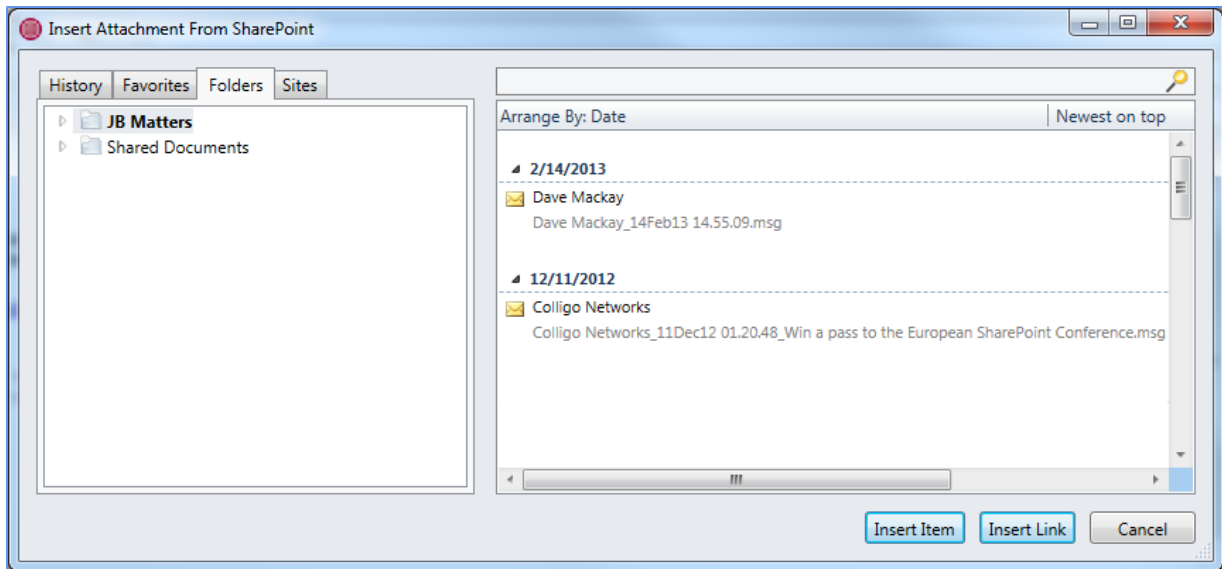
3. You can find an item by accessing your **History**, **Favorite**, or **Folder** locations by clicking on the appropriate tab, or see all of your SharePoint locations on the **Sites** tab. You can also use the Search field to narrow the list.

   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 SharePoint

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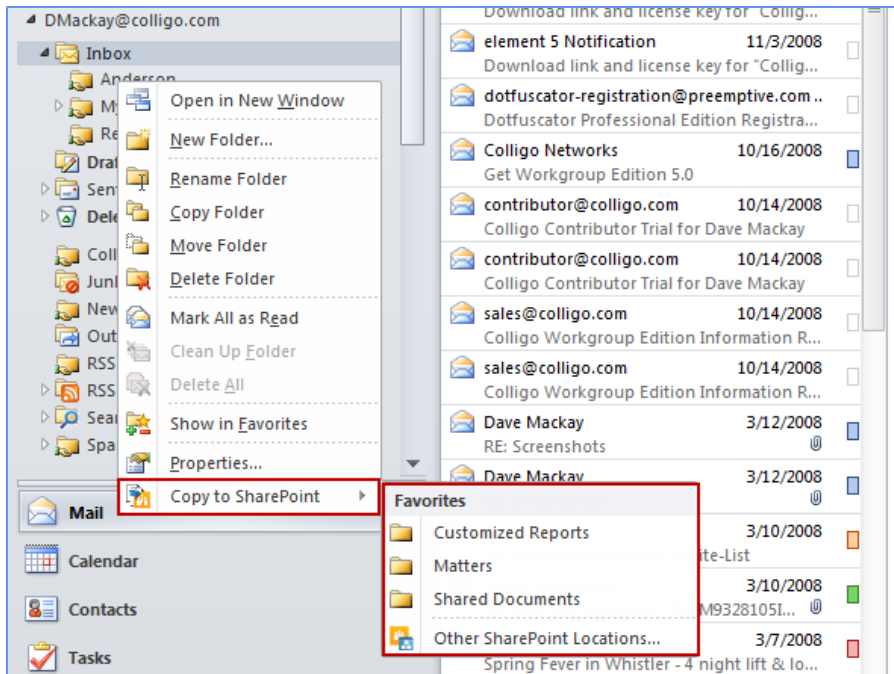
2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

The **Edit Properties** dialog displays:
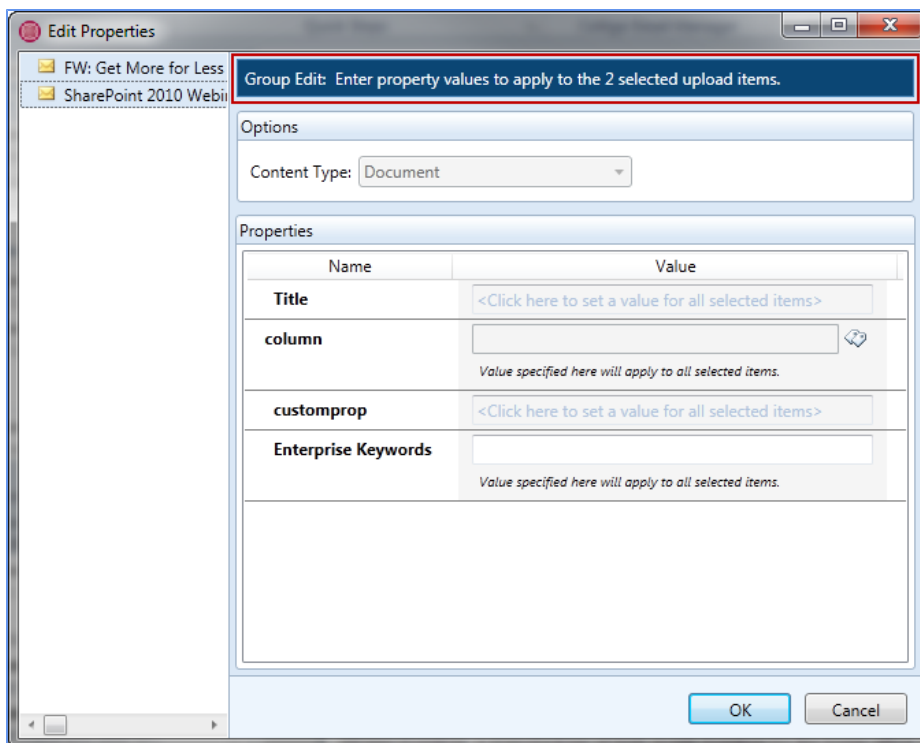
For information about applying metadata to multiple emails, see **Applying Metadata to Multiple Emails**.

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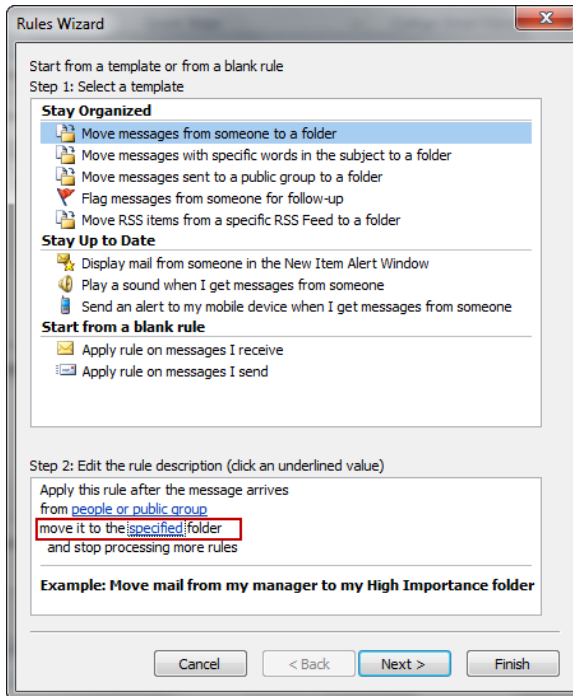
The **Rules and Alerts** dialog displays:
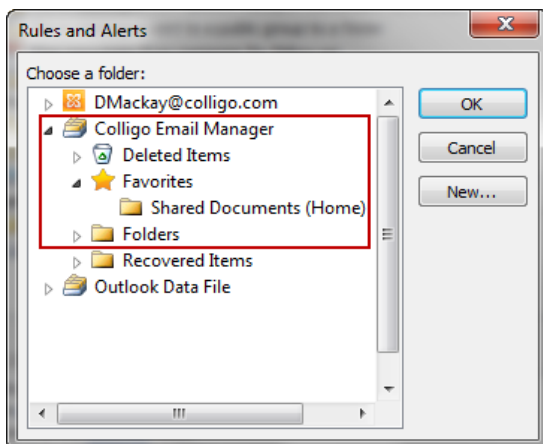
3. Browse to your preferred SharePoint folder in the **Colligo Email Manager** group.
4. Click **OK**.
5. Edit the remaining elements of the rule description in the wizard and click **Finish**.

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**:
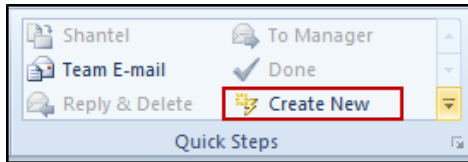
The **Edit Quick Step** dialog displays:
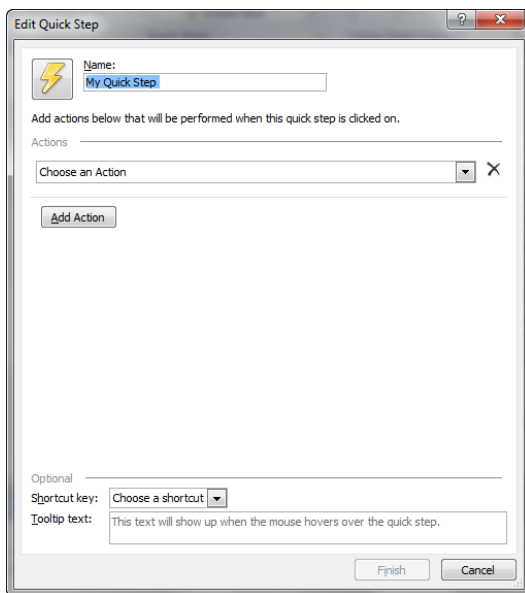
2. In the **Name** field, enter a name for the Quick Step.
3. Under the **Choose an Action** drop-down menu, in the **Filing** group, choose **Move to folder** or **Copy to folder** as preferred:
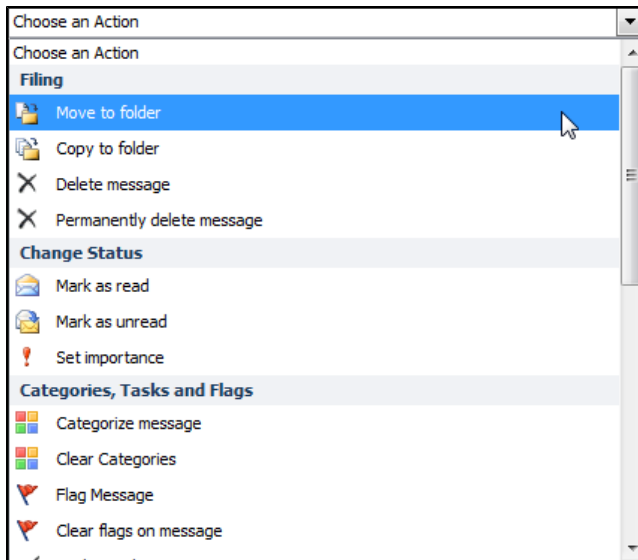
After you have chosen the Filing action, the **Choose folder** menu displays on the **Edit Quick Step** dialog.

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

   The **Select Folder** dialog displays:
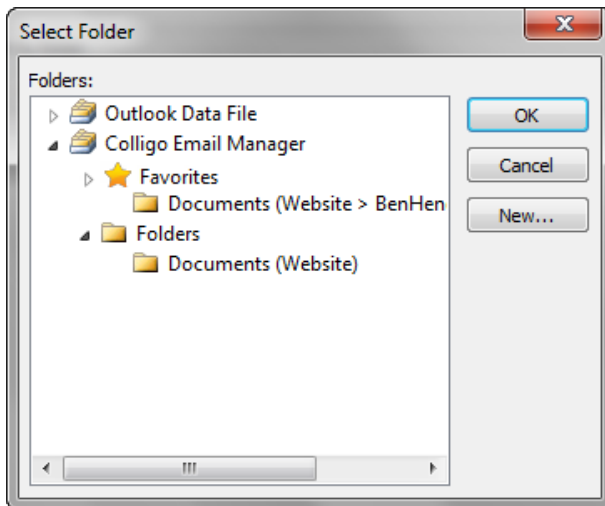
5. Choose a folder from the **Colligo Email Manager** group and click **OK**.
6. Click **Finish**.

   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:
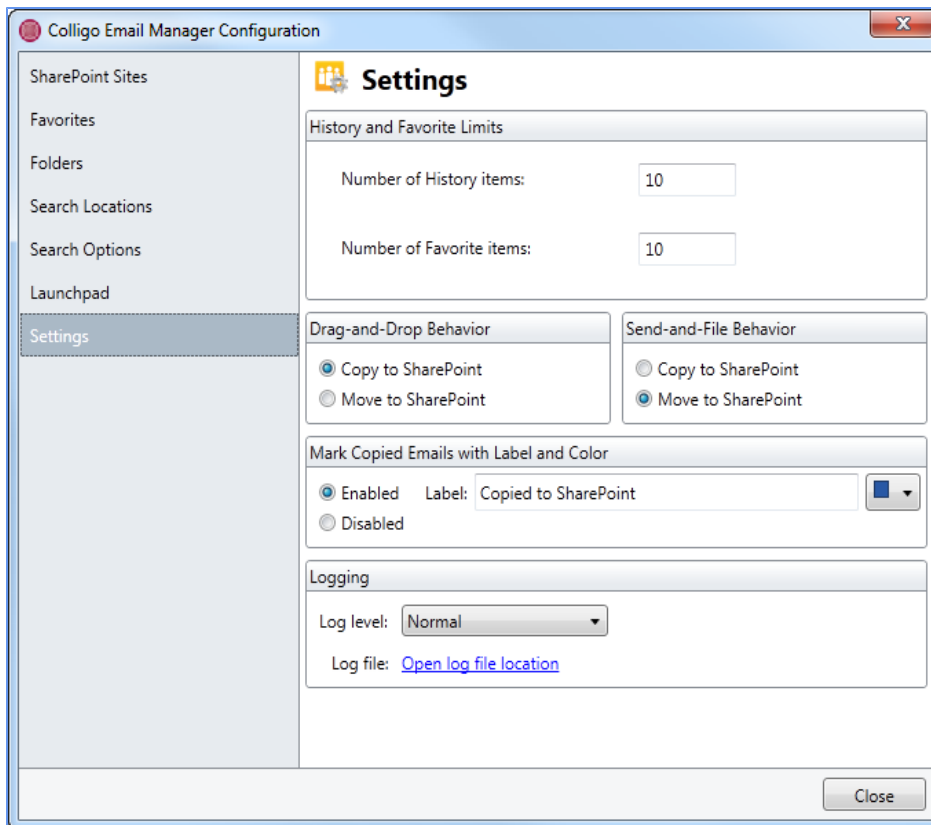
3. In the **History and Favorites Limits** section, enter the maximum number of items you want to display in the following lists:
    - **Number of History items**
    - **Number of Favorite items**

    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:
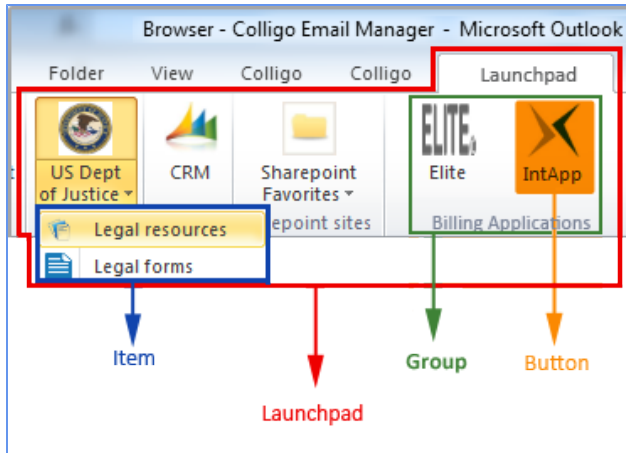
NOTE: Launchpad is not available in Outlook 2007.

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:
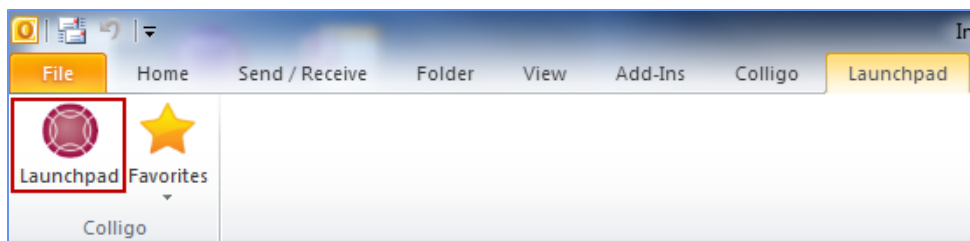
The **Launchpad** dialog displays:
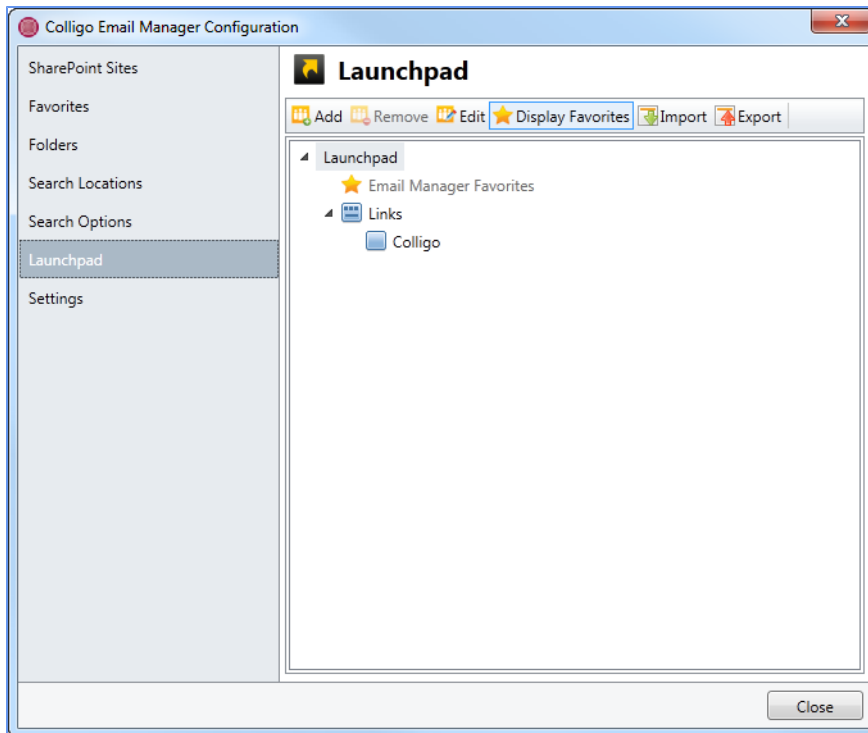
Editing the Launchpad Tab

To edit the name of the Launchpad tab:

1. Select **Launchpad** and click **Edit**.

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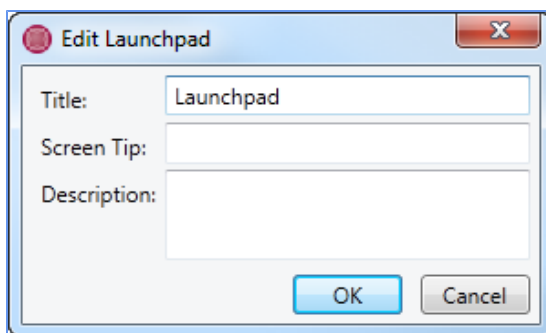
2. Edit the **Title** field.
3. Enter **Screen Tip** text and a **Description** if needed.
4. Click **OK**.
5. Restart Outlook for the change to take effect.

Adding a Group

To create a group in Launchpad:

1. Select Launchpad and click **Add**.

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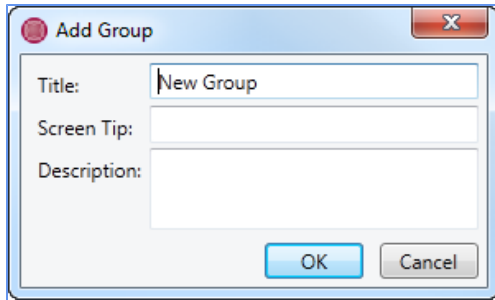
2. In the **Title** field, enter the name of the group.
3. Enter **Screen Tip** text and a **Description** if needed.
4. Click **OK**.
5. Restart Outlook for the change to take effect.

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:
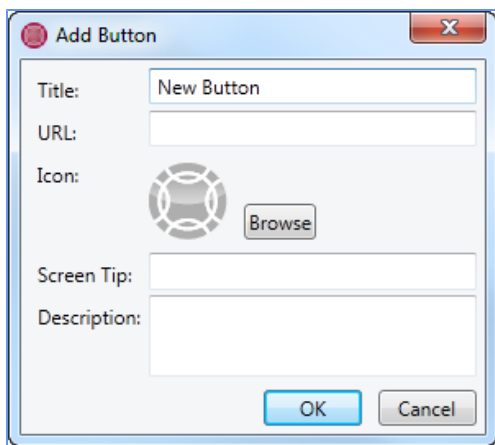
2. In the **Title** field, enter the name of the button.
3. In the **URL** field, enter the address of the web page or web application. After you enter the URL and click away from the field, the icon associated with the URL displays in the **Icon** space. If you want to change the icon, click **Browse** 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:

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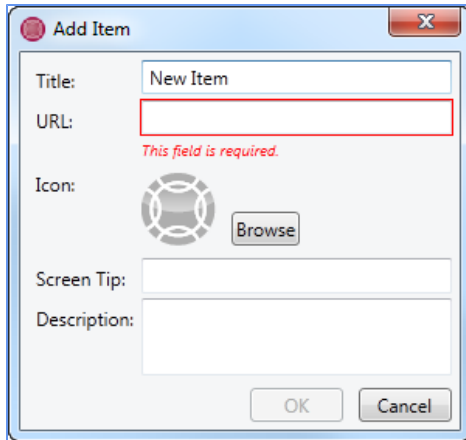
1. Enter **Screen Tip** text and a **Description** if needed.
2. Click **OK**.
3. Restart Outlook for the change to take effect.

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.

1. Click the **Display Favorites** button in the Launchpad dialog:
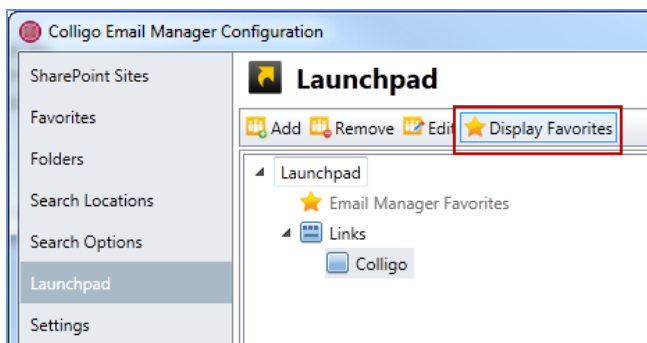
2. Restart Outlook for the change to take effect.

   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:
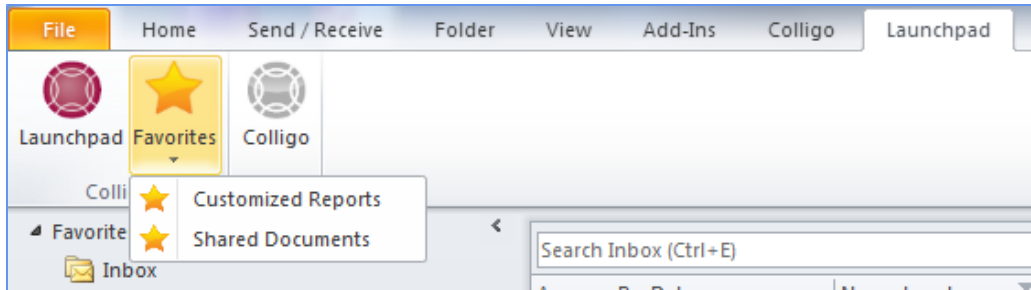
Viewing Launchpad URLs

After you have configured your groups, buttons, and items, they display on the **Launchpad** tab in Outlook:
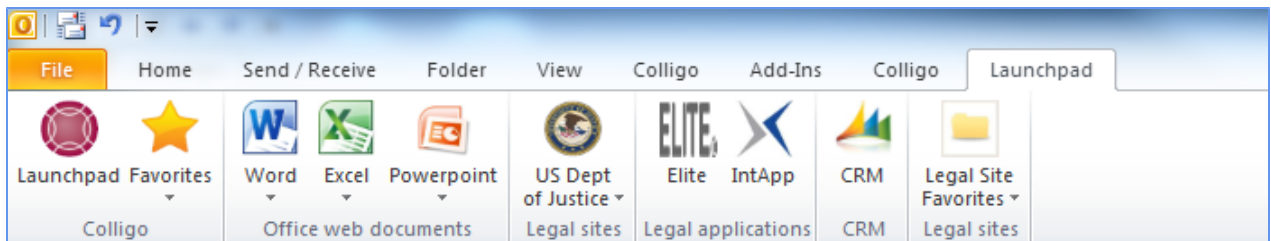
Click on any button or item to display its associated URL. If you move to another tab in Outlook, you can click the **Browser** icon in the folder tree to go back to the last page you viewed.

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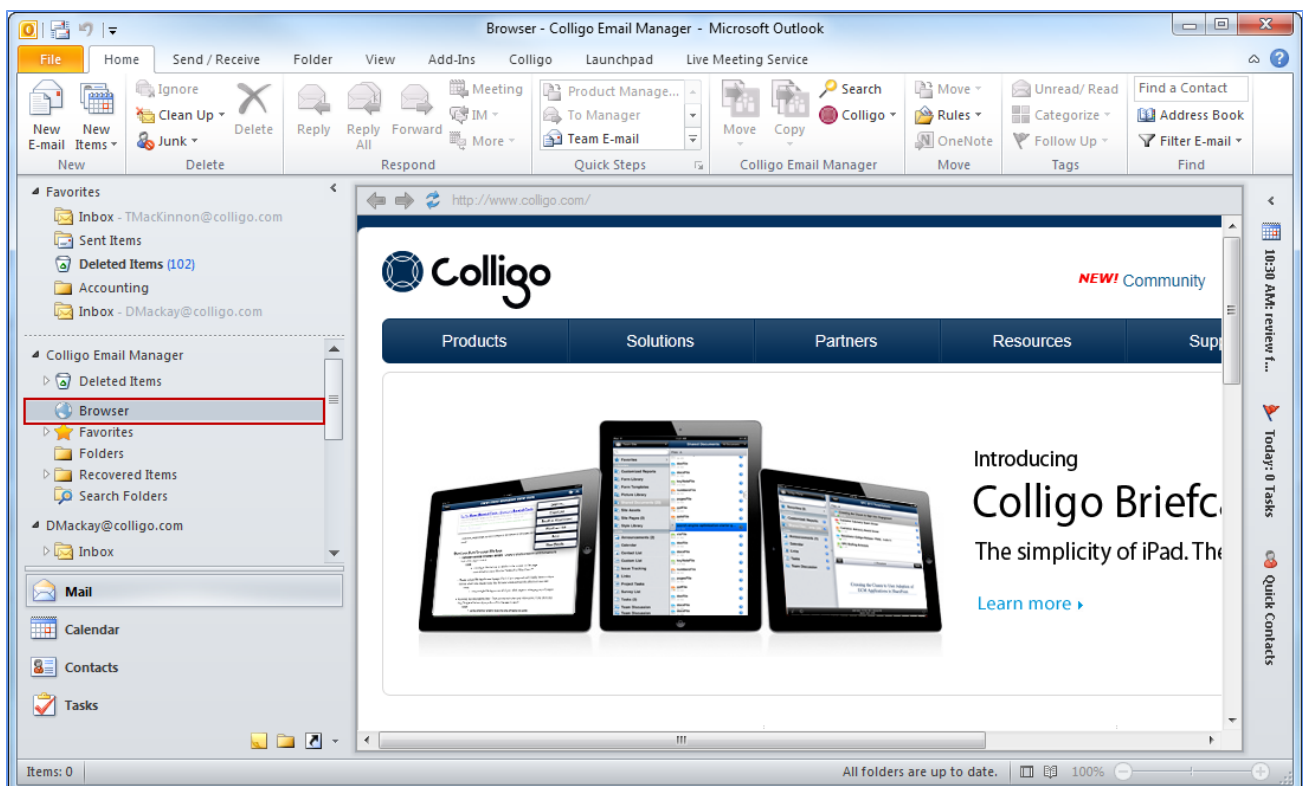
Importing and Exporting Launchpad Settings

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.
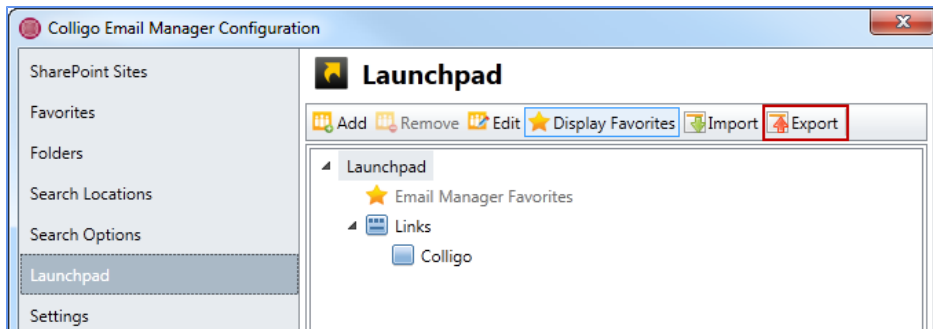
A Windows **Save As** dialog displays.

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.
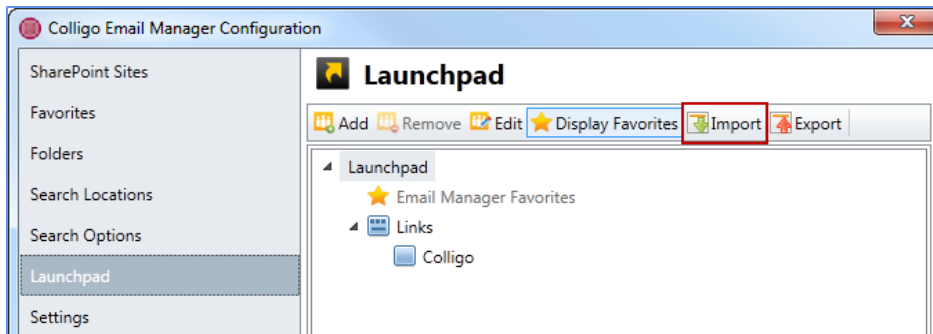
A Windows **Open** dialog displays.

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

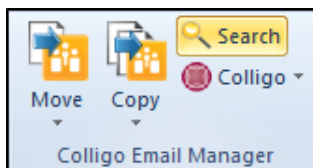To enable search functionality in Outlook 2010, click the **Search** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Show/Hide Search Pane** button in the **Colligo Email Manager** toolbar:

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.

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:
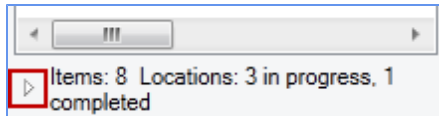
The search locations display. You can click **Cancel** to remove results from a particular site from the search.
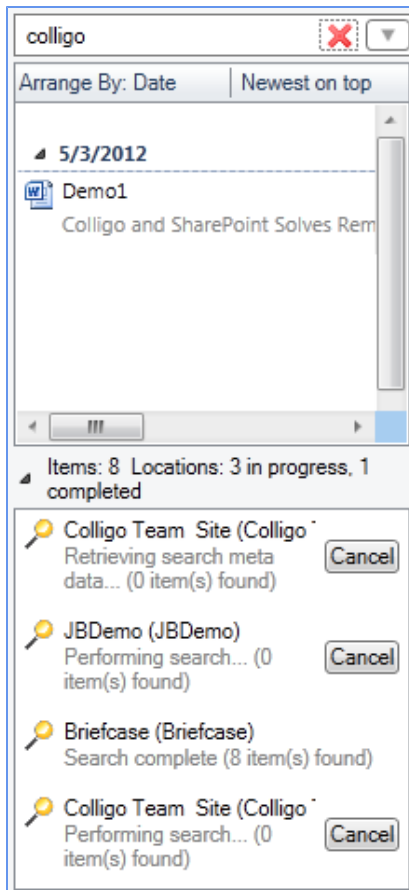
Defining Search Locations and Terms

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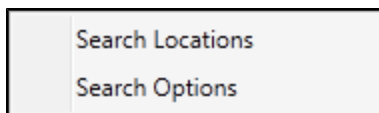
3. Select **Search Locations** to select the location(s) you want to search in. For more information, see Managing Search Locations.
4. Select **Search Options** to define your search options. For more information, see Managing Search Options.
5. Click the search icon to begin the search.

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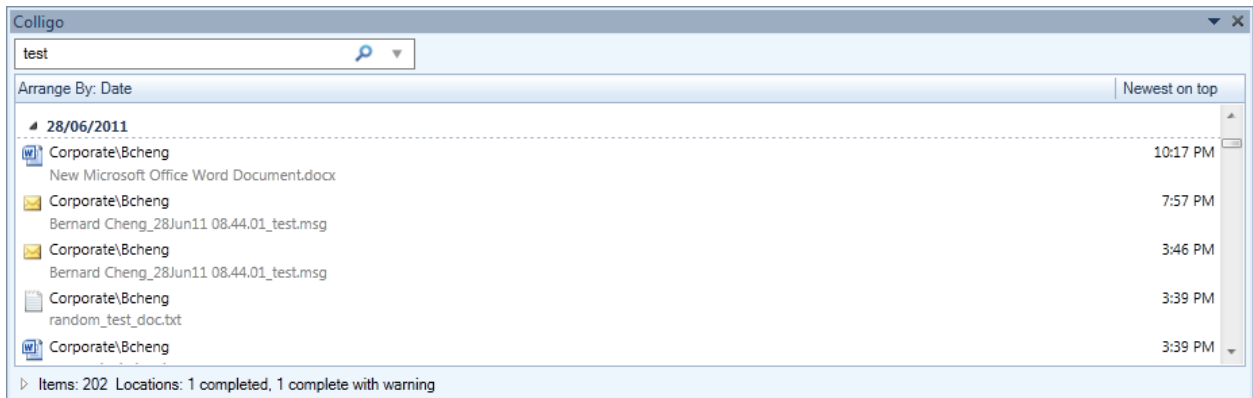
> **NOTE:** If you are not getting any search results it is likely because the search capability for the SharePoint site has not been configured. Please contact your systems administrator.

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**:
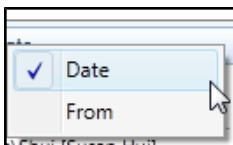
You can also sort the results by viewing the newest item on top or the oldest item on top. To toggle between these views, click the top-right corner of the search results to get the view you want:
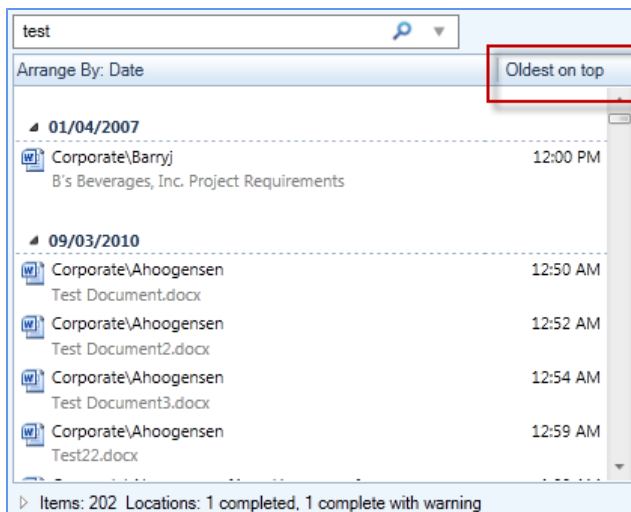
Additionally,if an email with an attachment is returned in your search results, the paperclip icon displays to indicate the attachment:
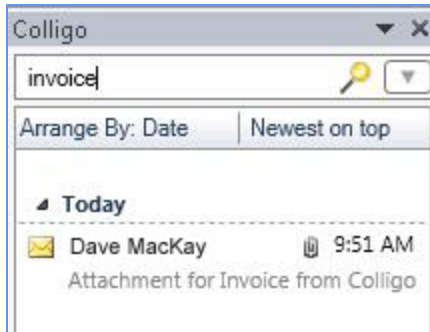
Managing Search Results

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:
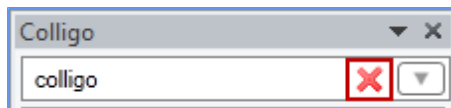
Viewing an Item

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:
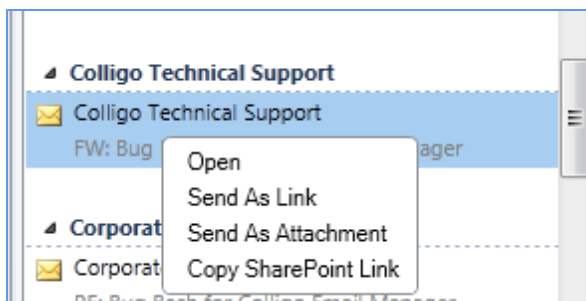
Emailing a Link to an Item

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.
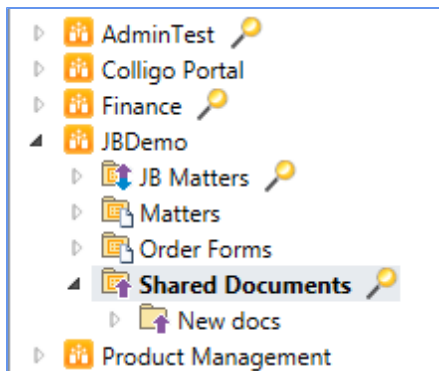
OR

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:
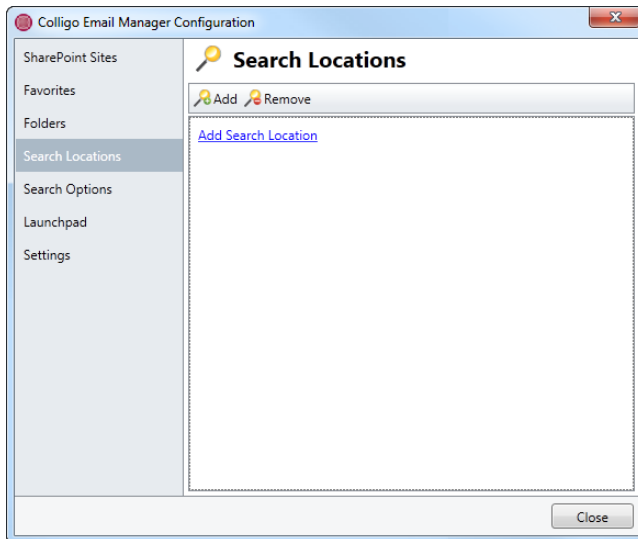
3. Click the **Add Search Location** link or the **Add** icon**.**

    The **Add Search Location** dialog displays:

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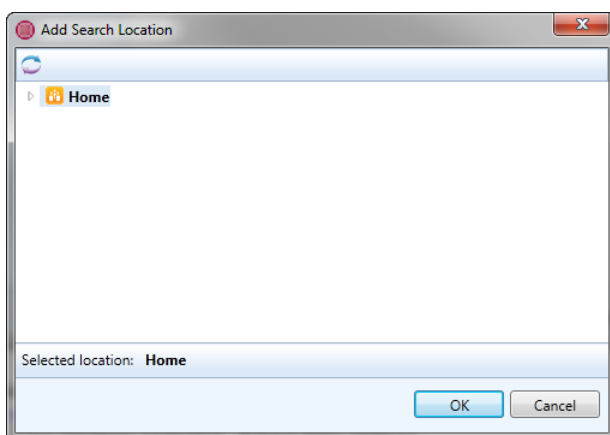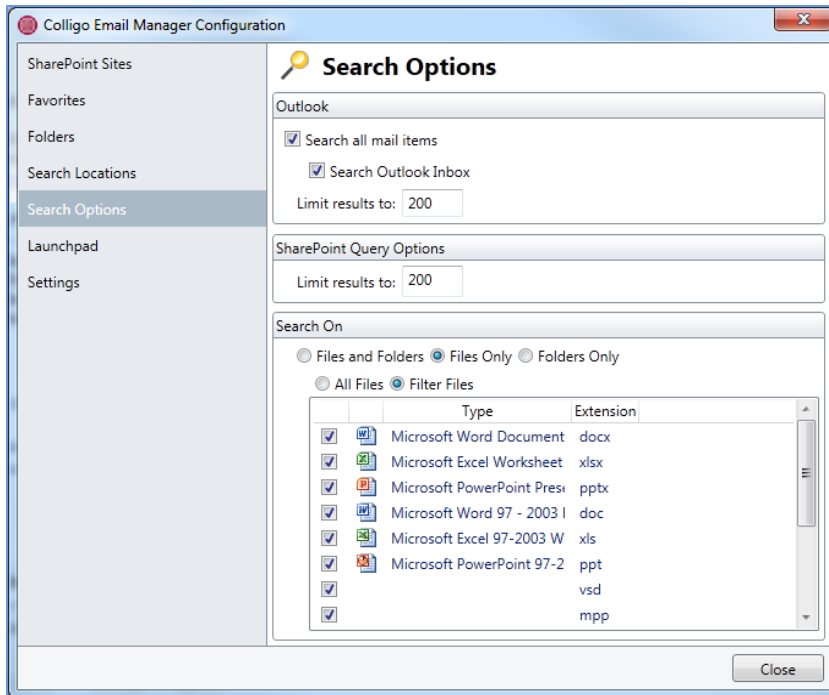
1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo Toolbar** in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Options**.

   The **Search Options** dialog displays.

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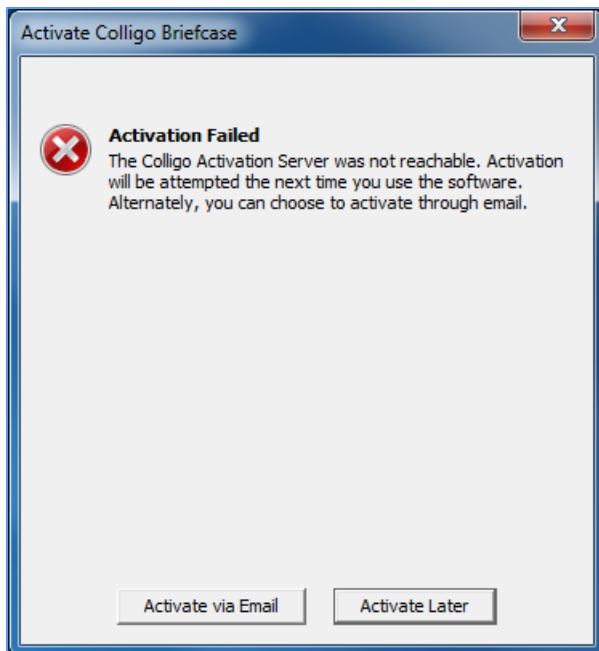
> *NOTE:* The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

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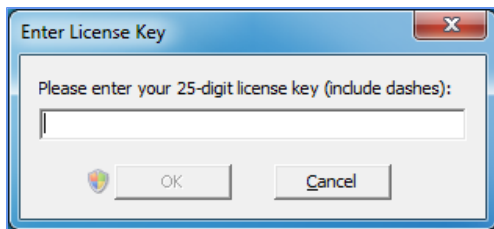
The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

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.
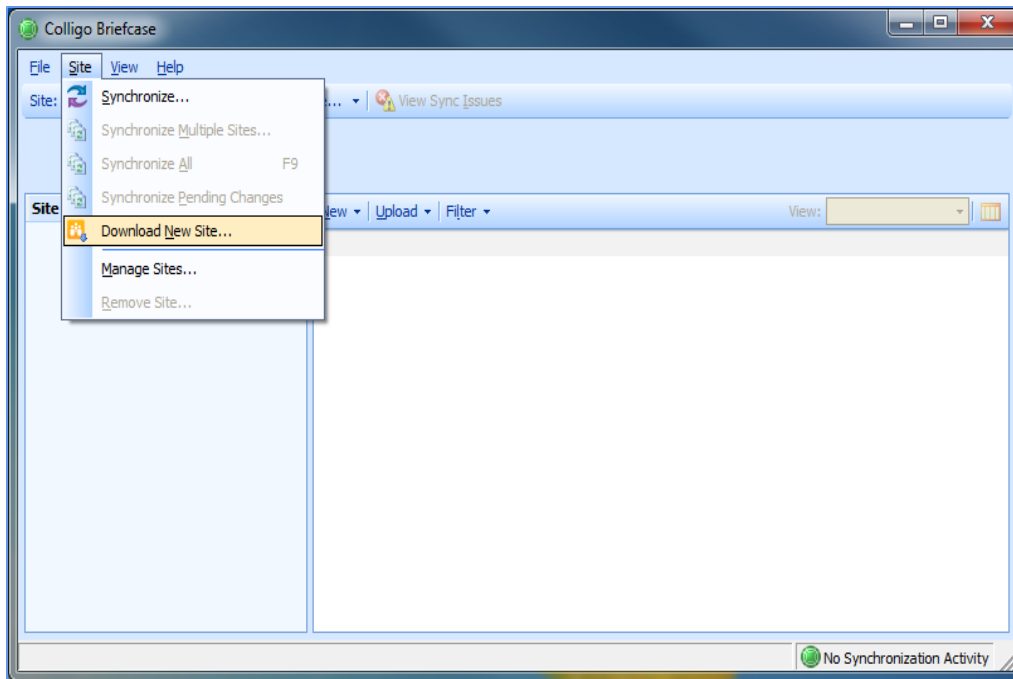
Adding a Site in Colligo Briefcase

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

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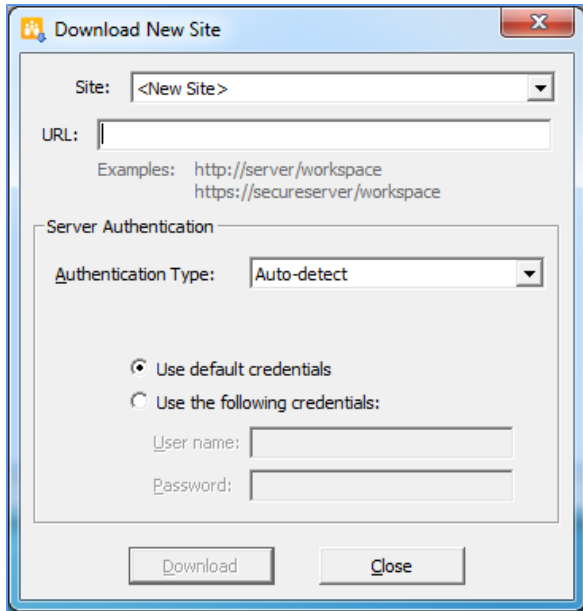● Using the Connect to Briefcase option in Internet Explorer

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

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

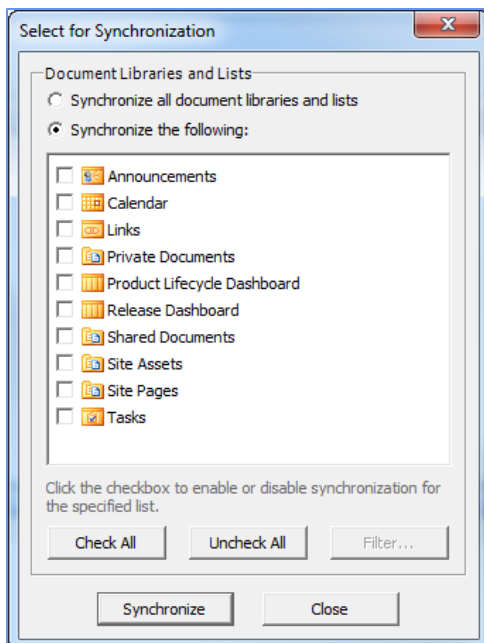1. From the **Site** menu, choose **Download New Site**:

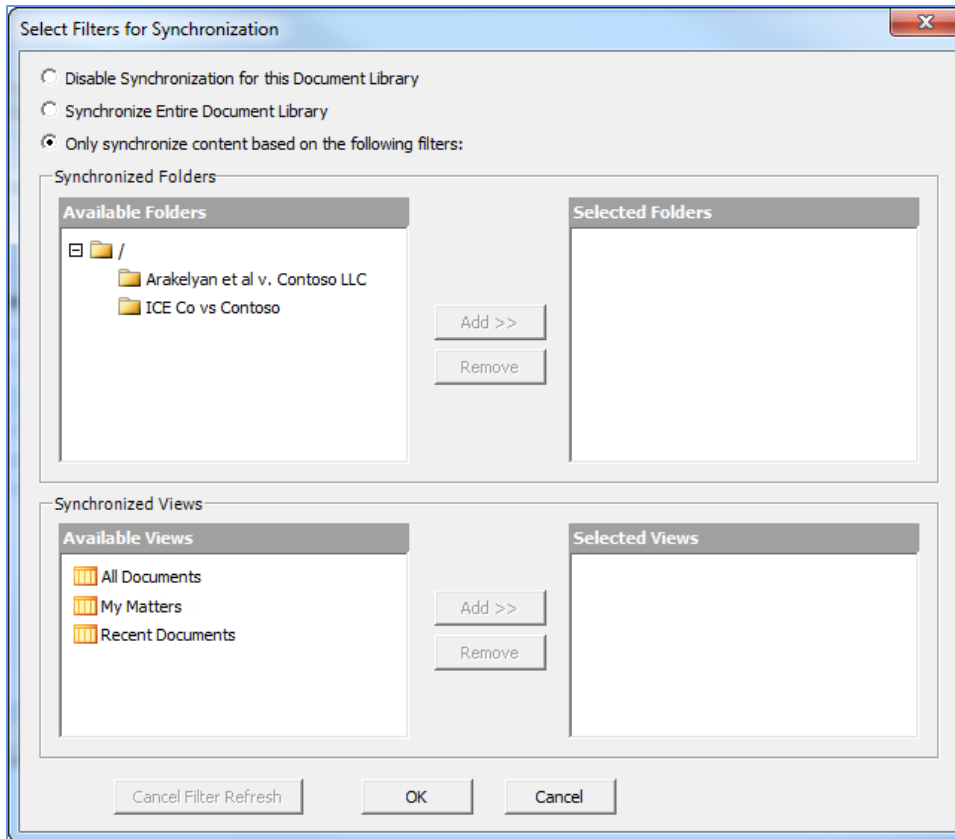The **Download New Site** dialog displays.

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:

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:

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:
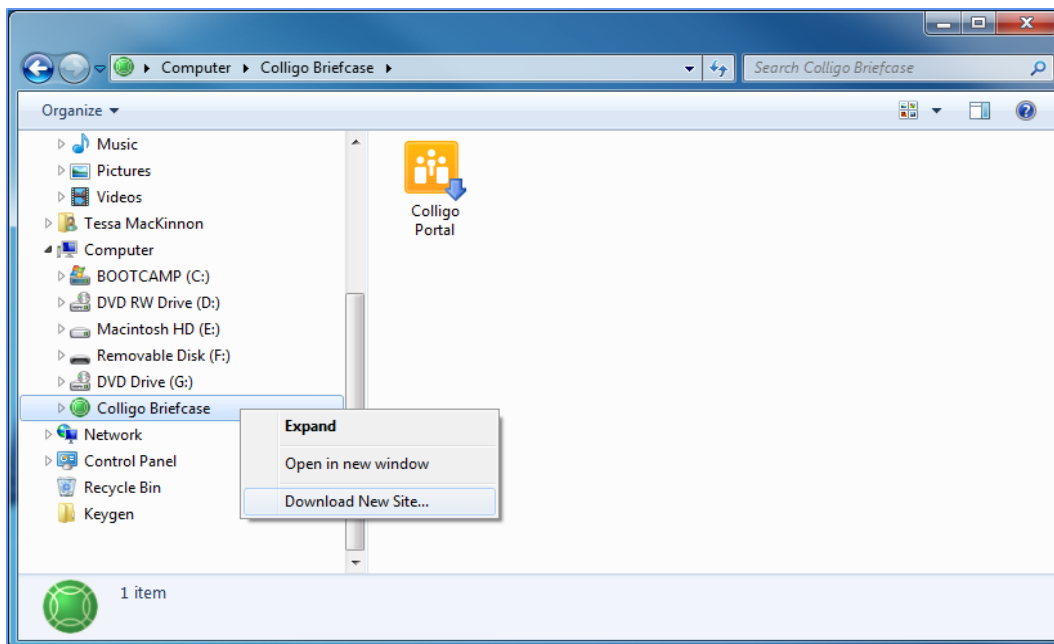
The **Download New Site** dialog displays.

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**.
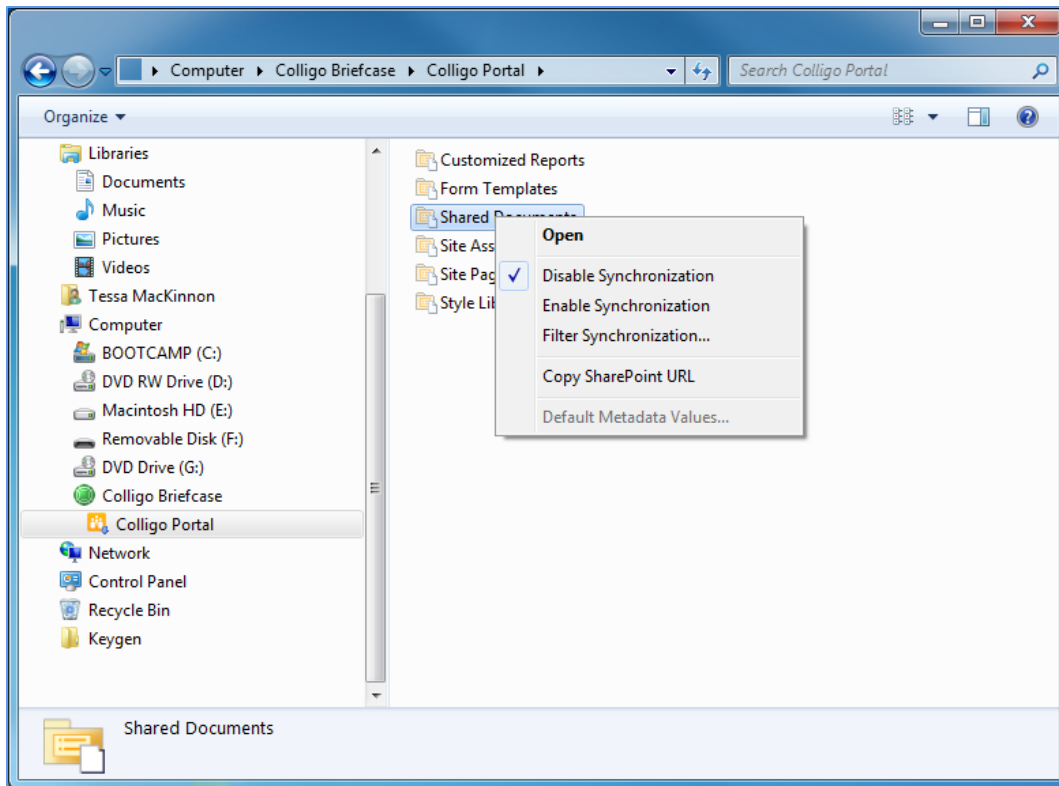
After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:
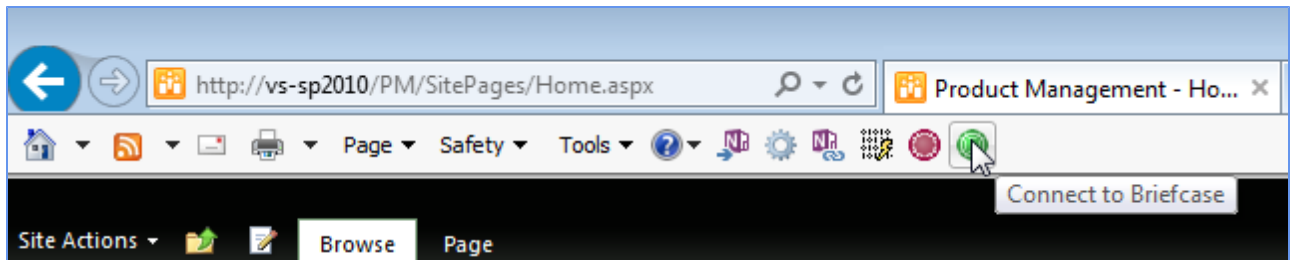
- Right-click the Colligo Briefcase icon in the system tray and choose Synchronize All:
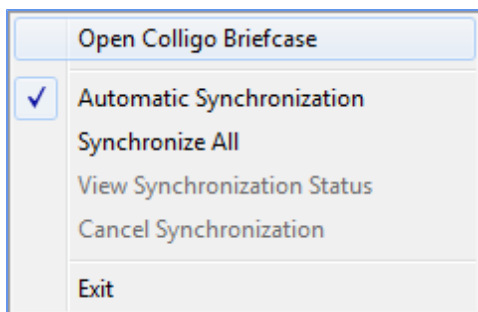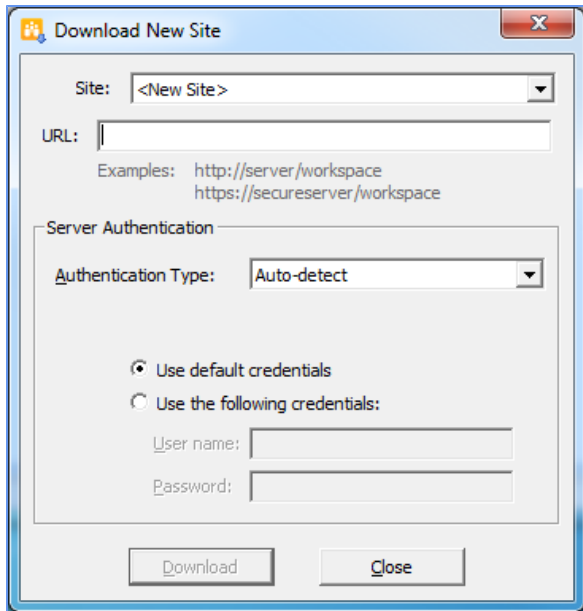

- From the **Site** menu in the stand-alone Colligo Briefcase interface, choose one of the following options:
  - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the Synchronize Multiple Sites dialog, check your preferred sites and click Synchronize.
  - **Synchronize 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.
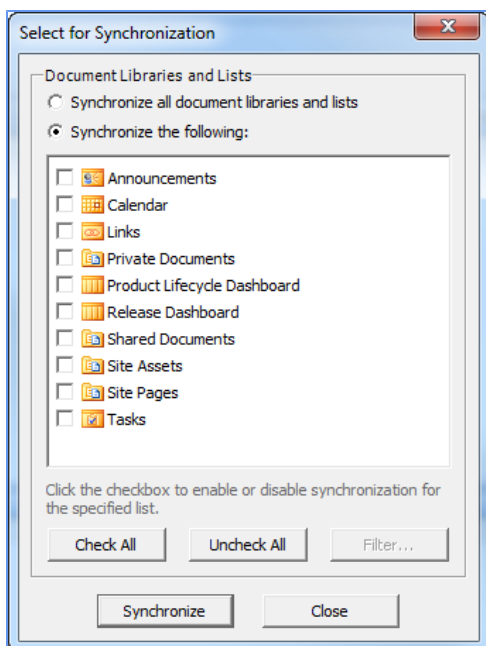2. Click the green **Connect to Briefcase** icon on the toolbar.

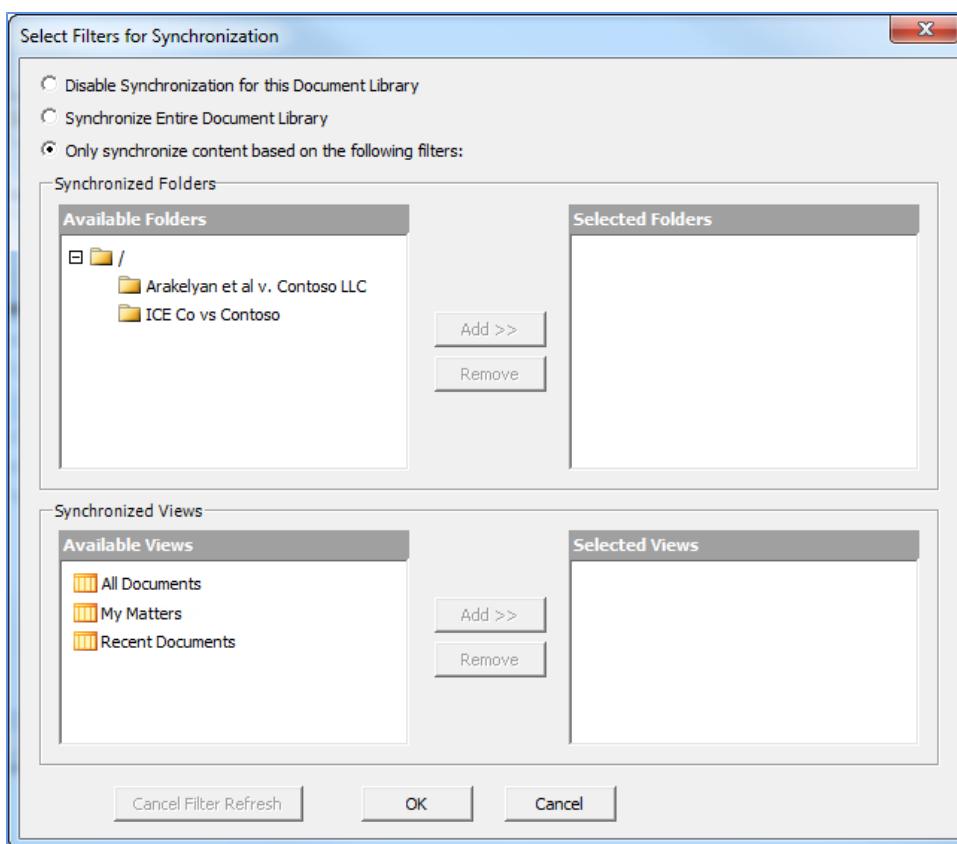The **Download New Site** dialog displays.

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:

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:

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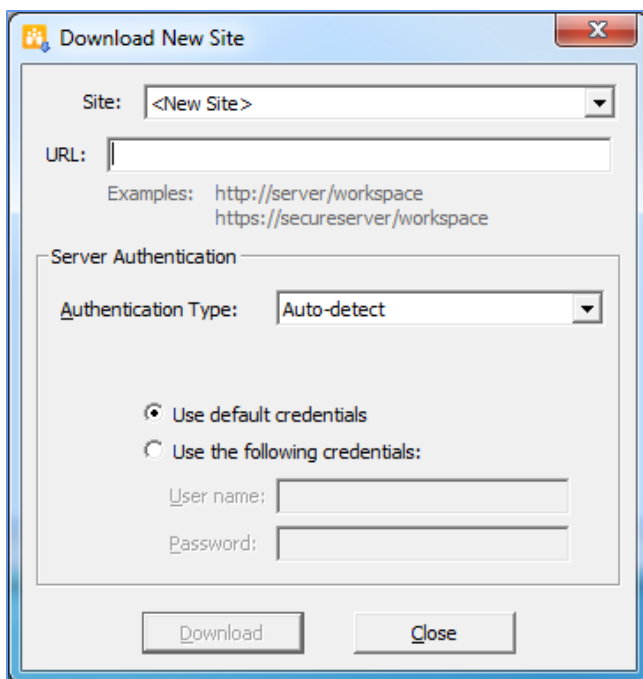
You can edit your lists and libraries in one of two ways:

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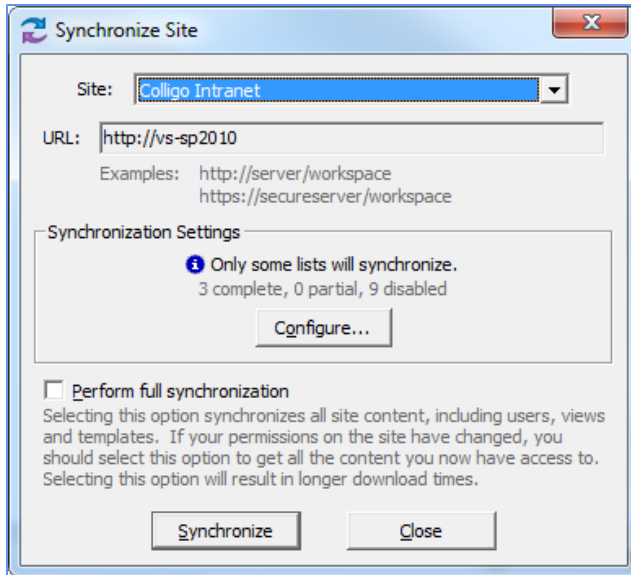2. Synchronize the site.

OR

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

   The **Download New Site** dialog displays:

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

   The **Synchronize Site** dialog displays:

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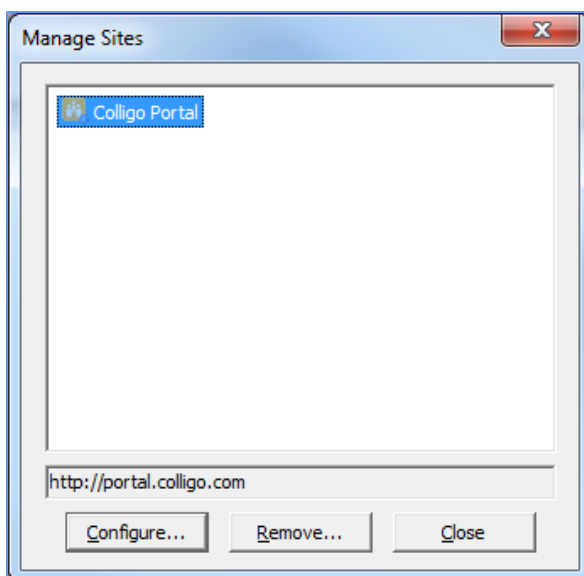6. Click **Synchronize**.

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**.
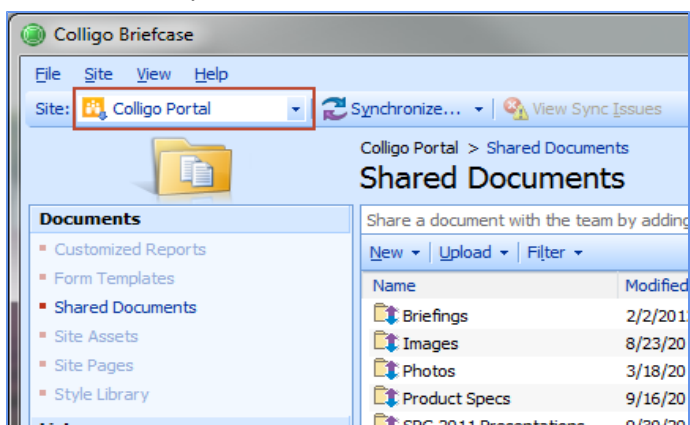
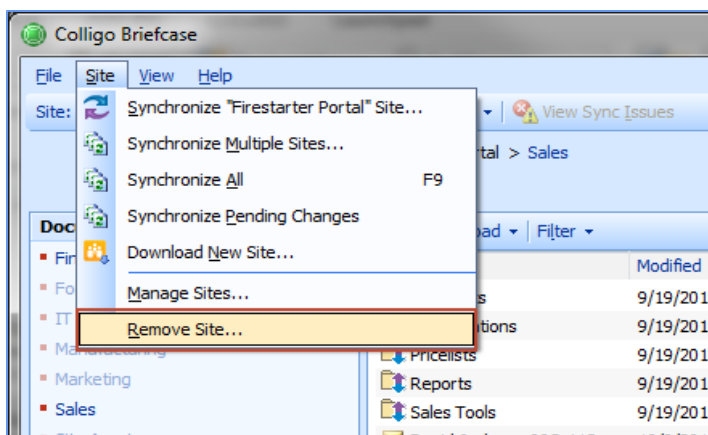   The **Manage Sites** dialog displays:

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:
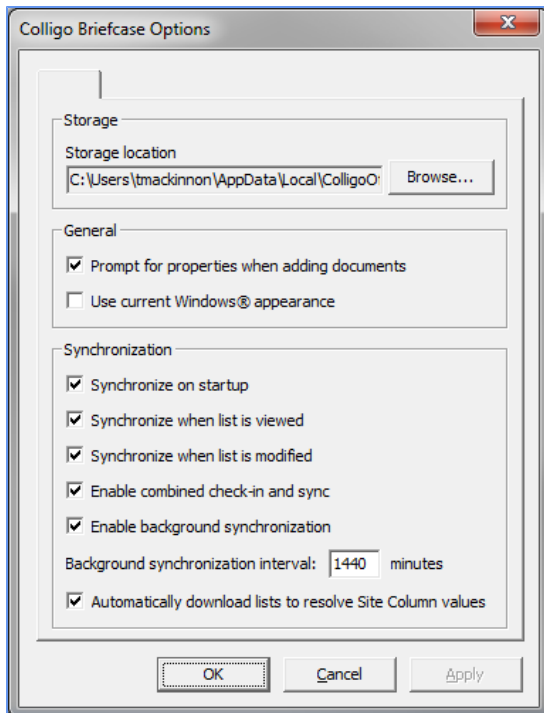
2. In the General section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring default metadata; see **Setting Default Metadata**.
3. 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 downloaded

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:
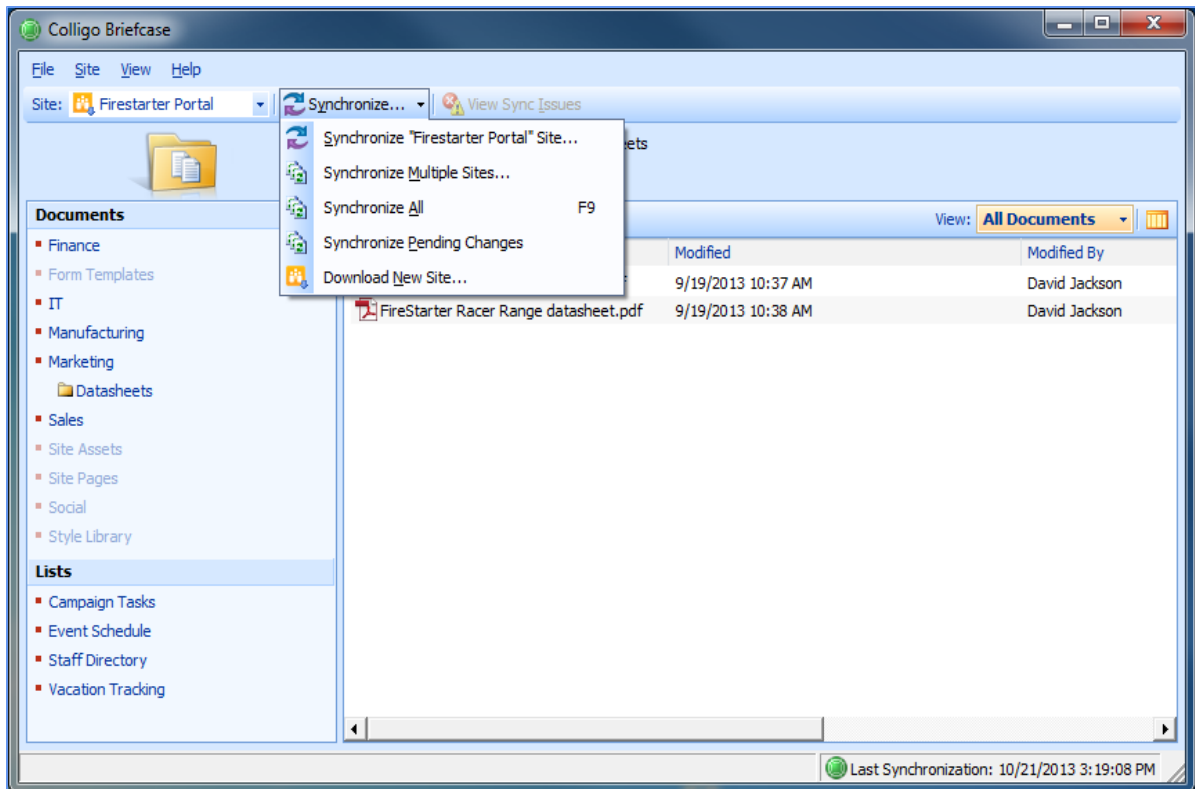
2. Choose from the following:
   - **Synchronize Site**: select this option to synchronize the site currently displayed
   - **Synchronize Multiple Sites**: select this option to display all sites and choose which ones you want to synchronize
   - **Synchronize All**: select this option to synchronize 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:
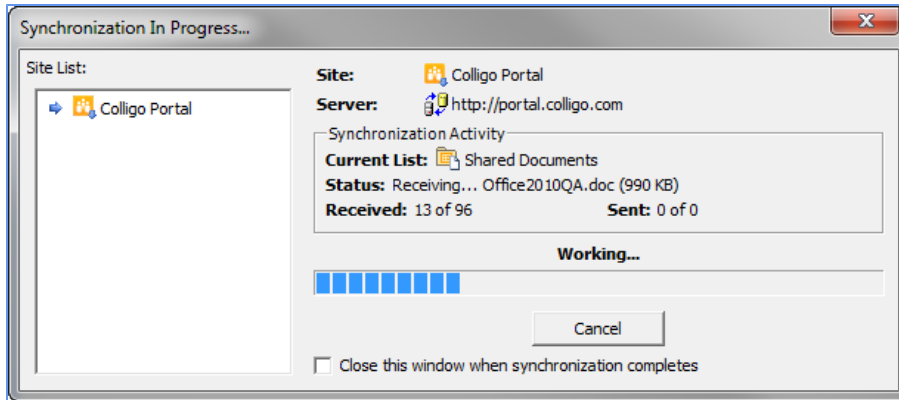
The **Status** field displays the name and size of the file being synchronized, as well as if the file is being sent or received.

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 :
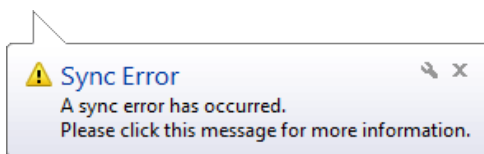
In addition, the **View Sync Issues** button changes color so it is more visible.
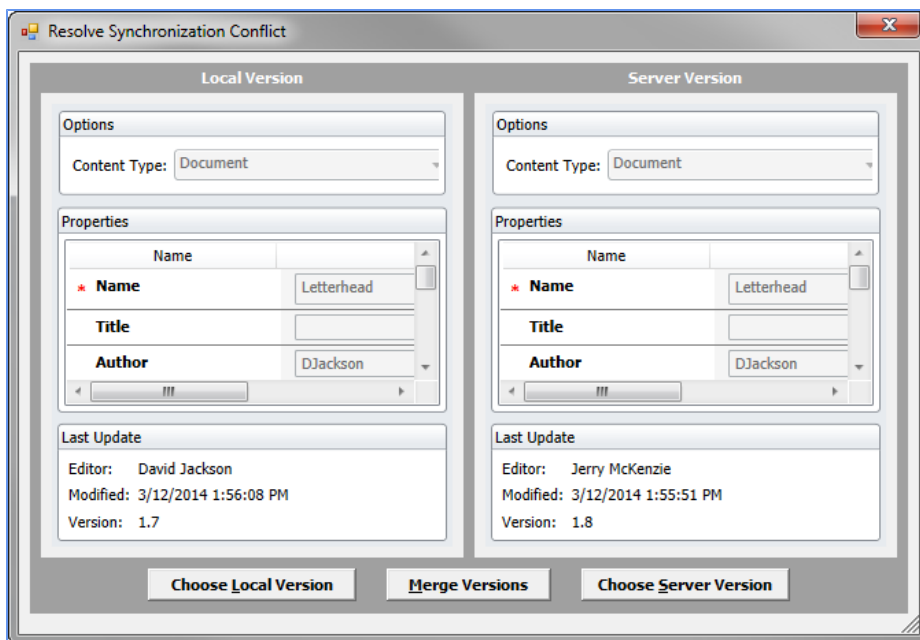
You can click the **View Sync Issues** button to display the **Sync Issues** pane:
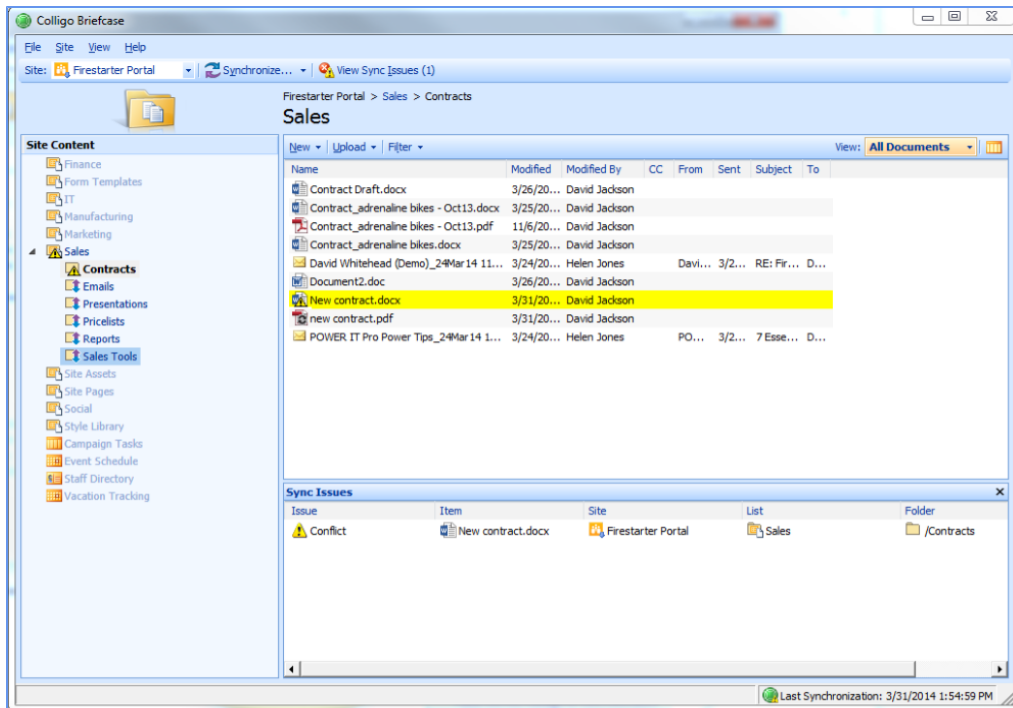
The sync error displays the type of issue, the item name, site, list, and folder. You can use these columns to sort your sync issues.

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

The **Resolve Synchronization Conflict** screen displays:

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:
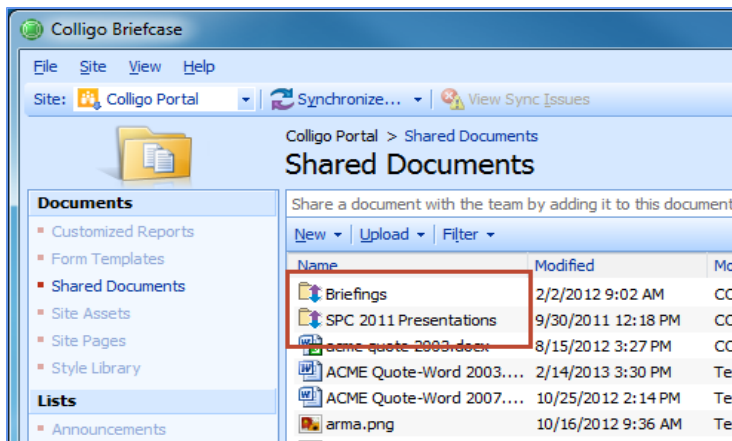
Upload-only locations display as follows:
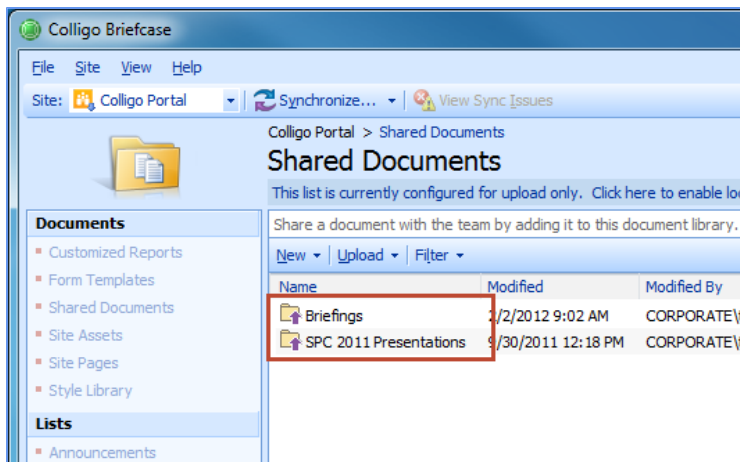
The Tree View in the stand-alone interface allows you to view content more dynamically and to move and copy content between folders in the same SharePoint site using drag-and-drop. You can change the view by enabling or disabling the **Tree View** option in the **View** menu:
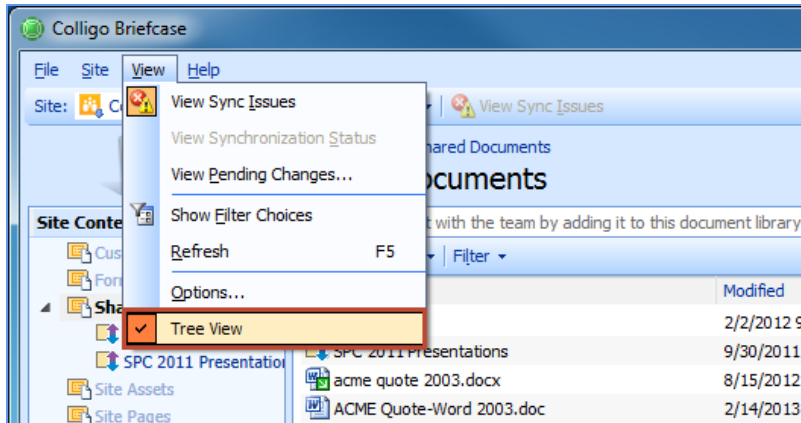
NOTE: you cannot enable or disable synchronization of document libraries or lists while Tree View is enabled. If you want to do this, you must turn off Tree View and work in List View.

NOTE: If the Tree View option is not available to you, it has been disabled by your IT Administrator.
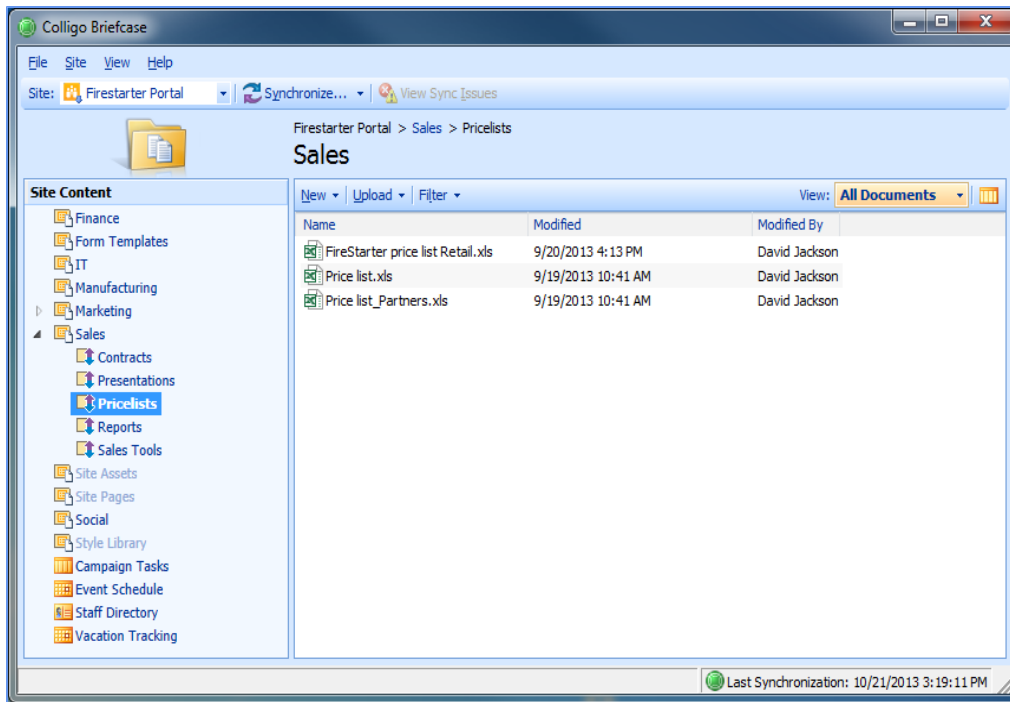
The following icons are overlaid on file type icons in the sync pane to indicate the following item statuses:

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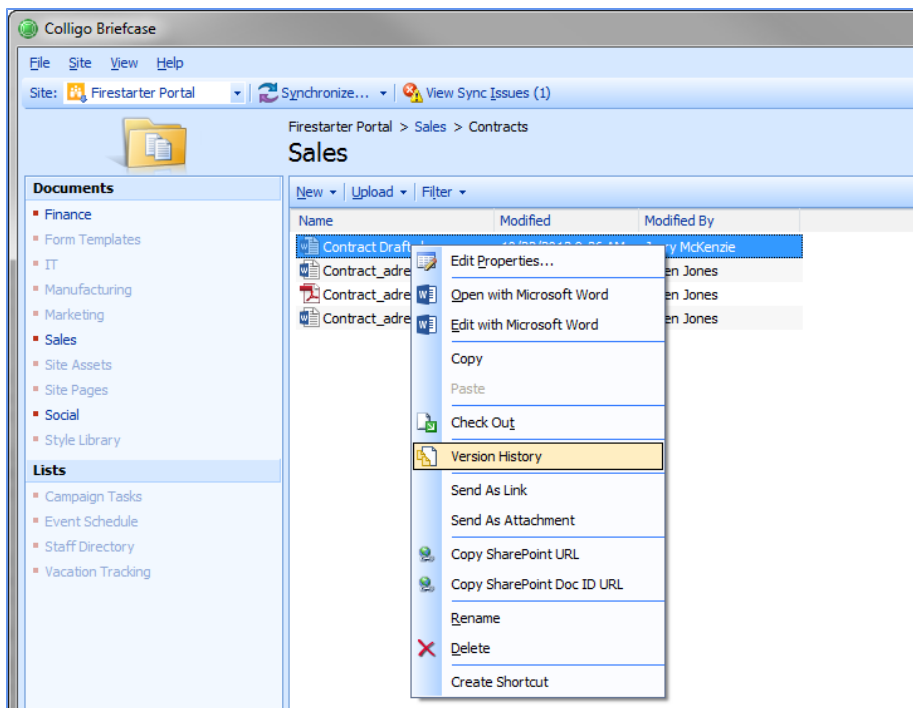- Declared Record:

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.
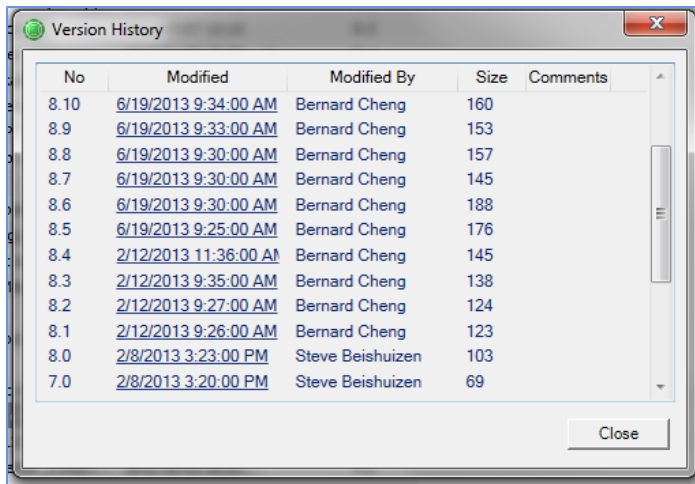
Viewing Item Version History

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:

NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.
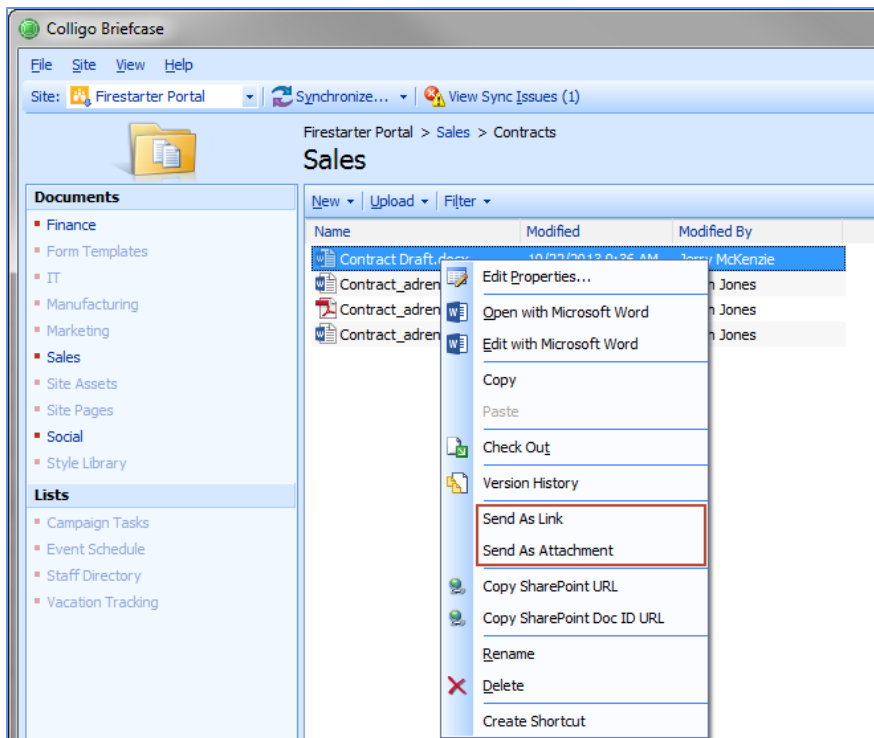
The **Version History** window displays:

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:

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:
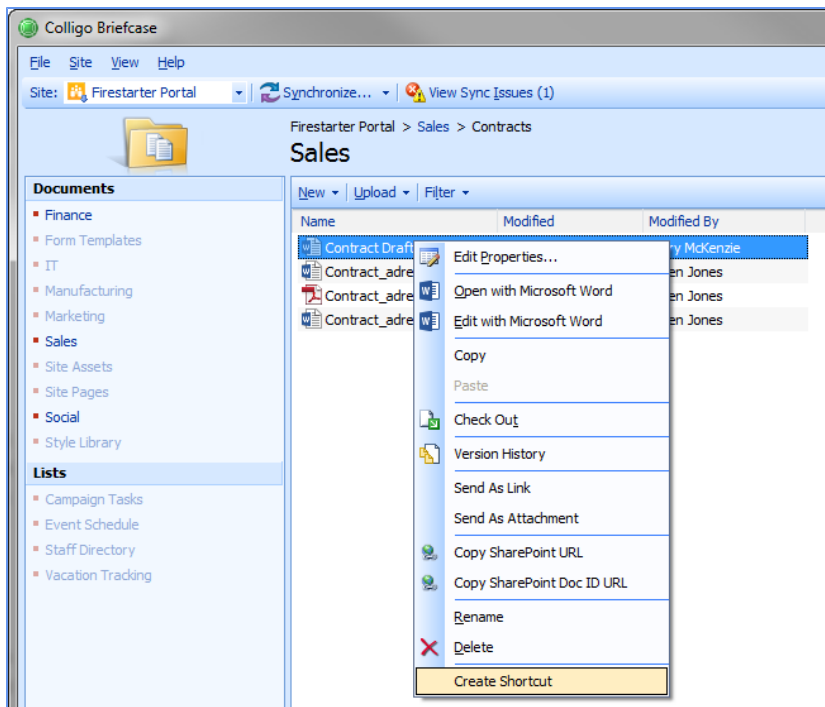
The default location for the shortcut is your desktop.

Editing Content

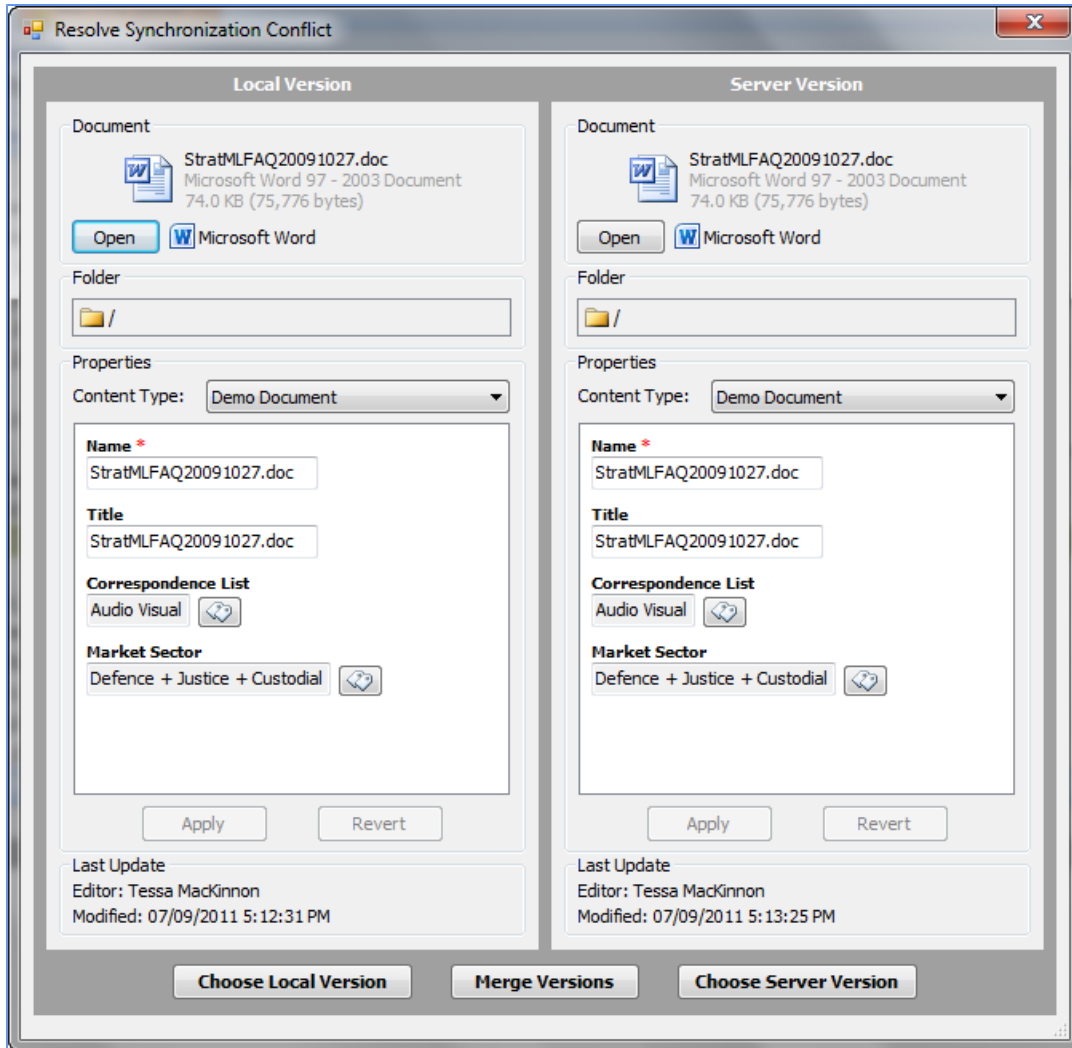To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

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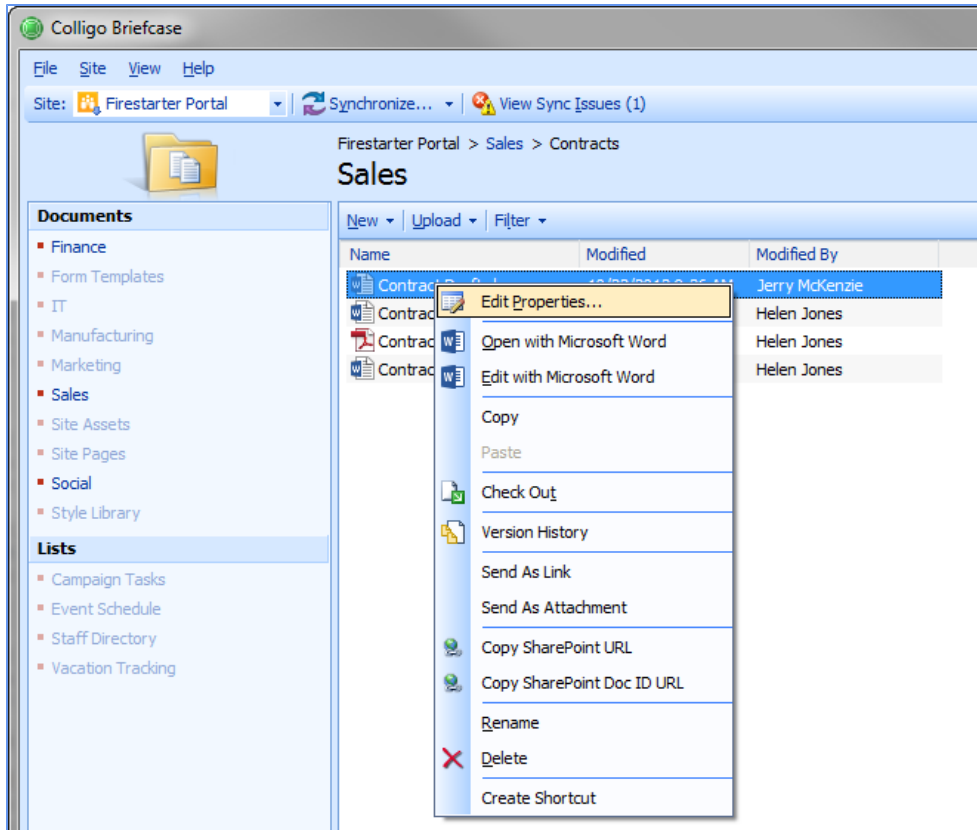
You can click **Open** to view the edits in each version, and then click one of the following options:

- **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.
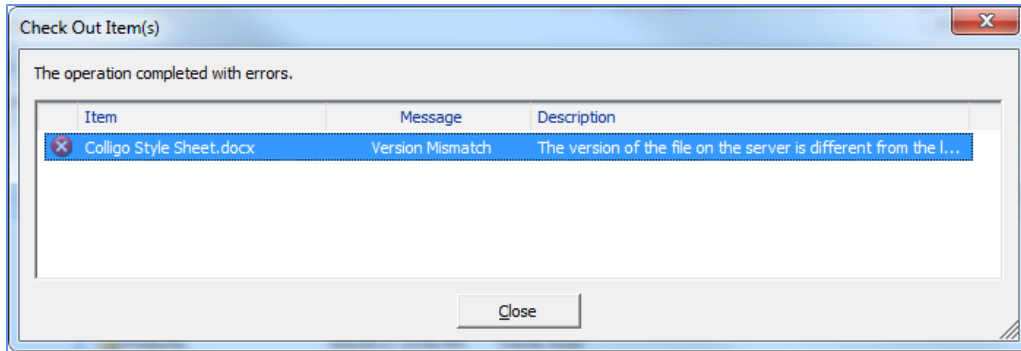
Checking Items In or Out

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:

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**.
2. 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
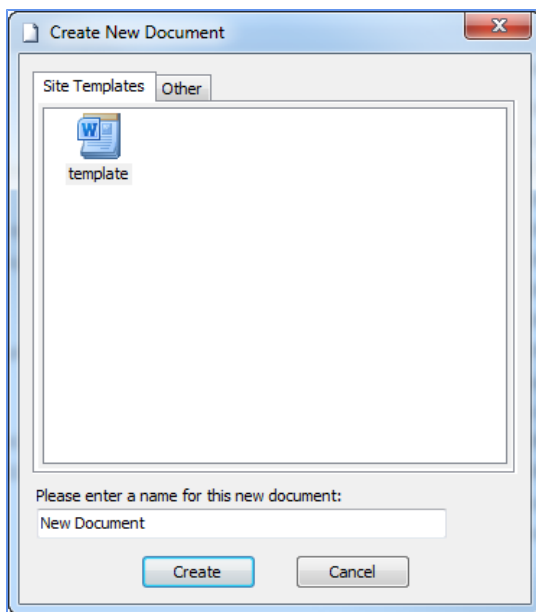- Drag-and-drop or copy-and-paste content

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:
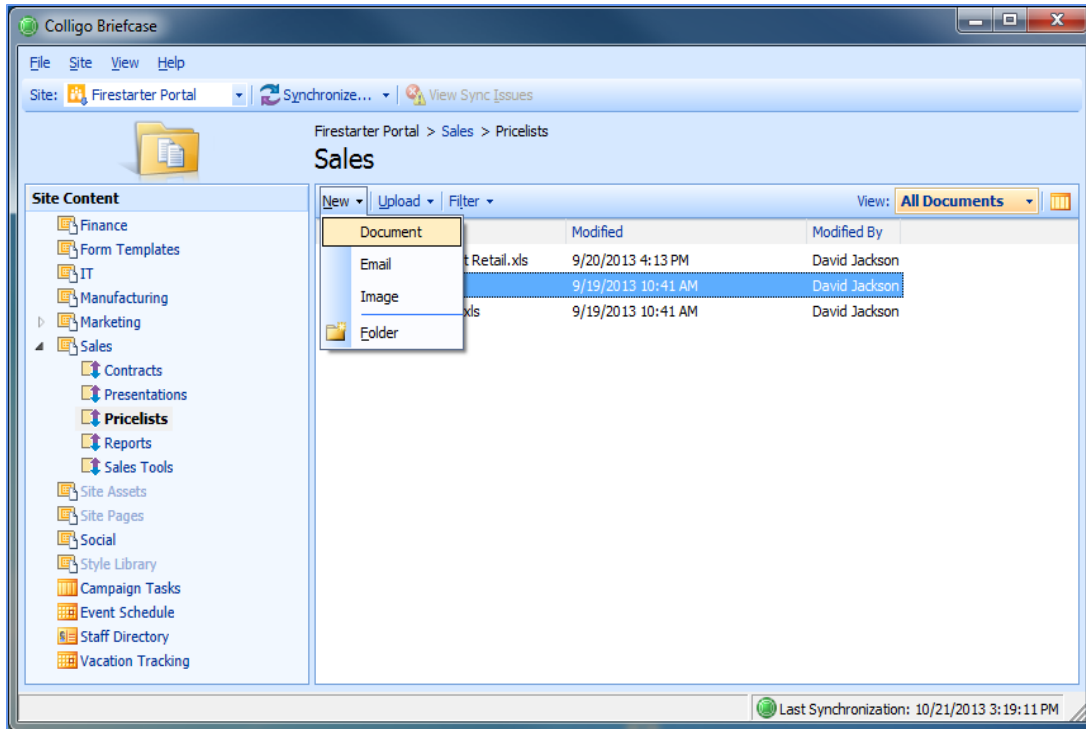
The **Create New Document** dialog displays:

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. This is where you can record information about the document that you are adding to SharePoint.

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

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**:
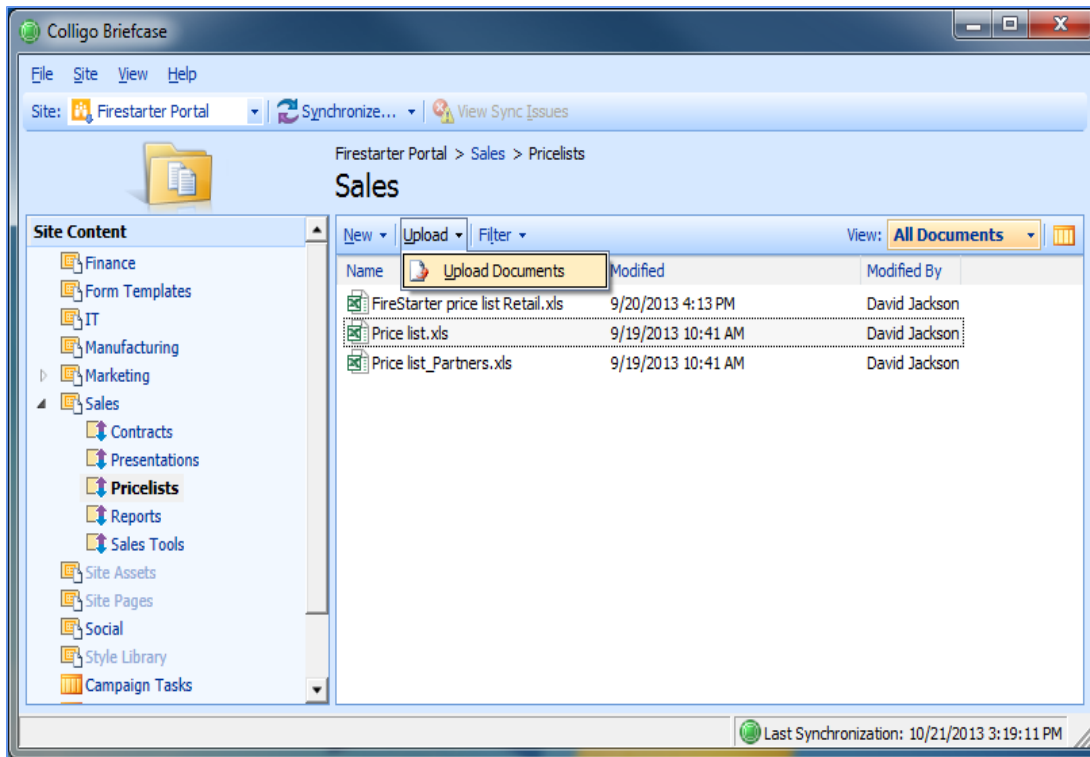
The **Upload Documents** dialog displays.

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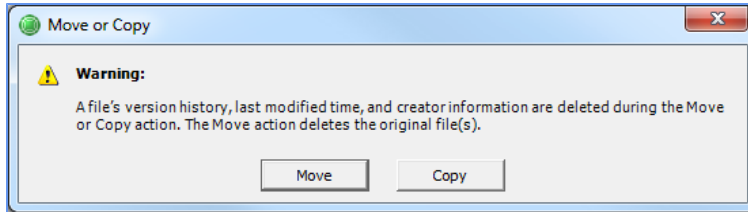
NOTE: this feature is disabled by default. Contact your IT Administrator.

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:

3. Click **Move** or **Copy**. Note that no version history, timestamps, or original author information is pre-served 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:
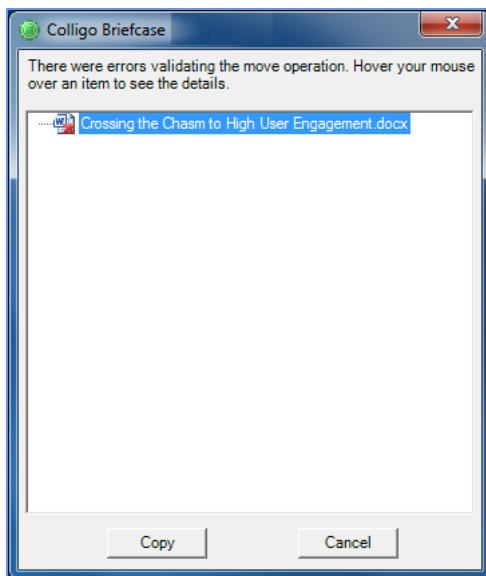

If you hover your mouse over the item, a message displays telling you who has the item checked out. That user needs to check the item back in before you can move the item.

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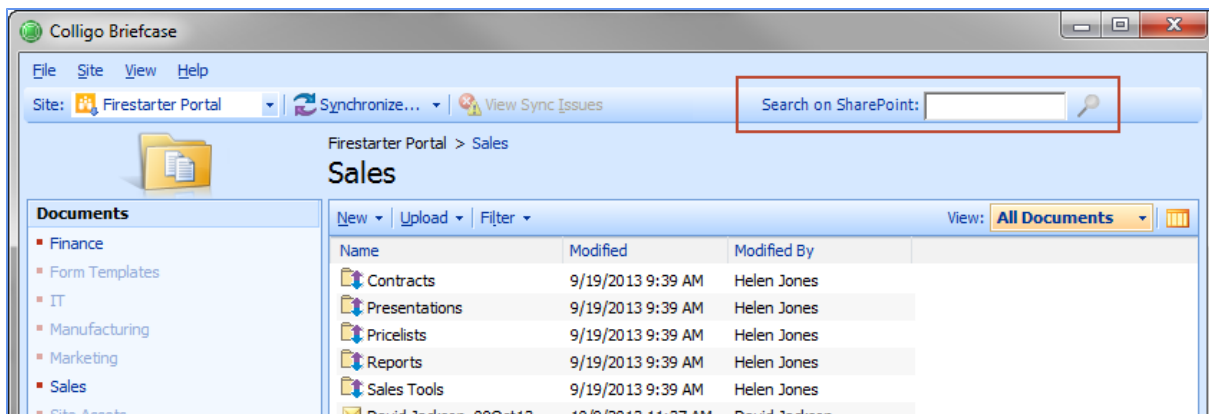
When you enter a term and press **Enter**, or click the magnifying glass icon, your web browser launches and the search results for the site display.

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 .

Offline locations display as follows:
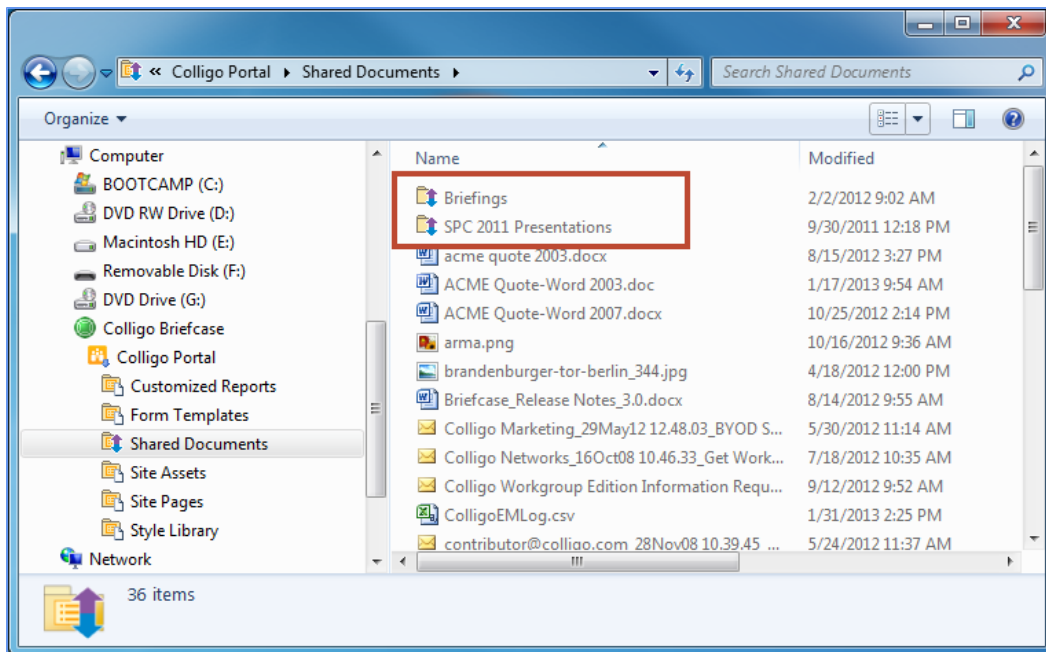
Upload-only locations display as follows:
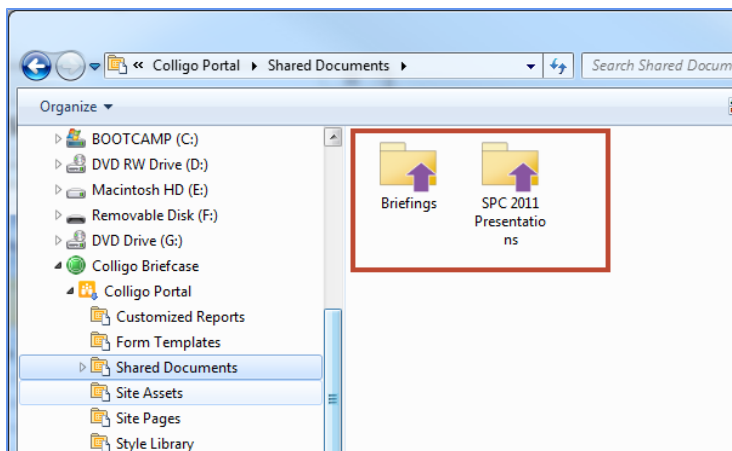
The following icons are overlaid on file type icons to indicate the following item statuses:

- 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:
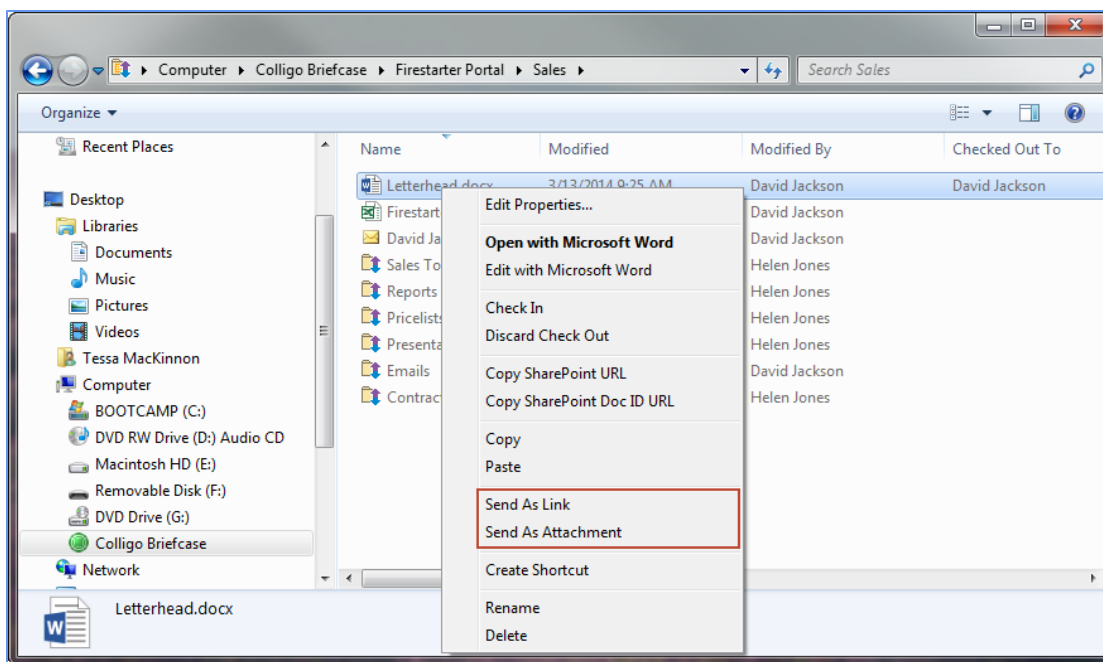
Creating a Shortcut to an Item

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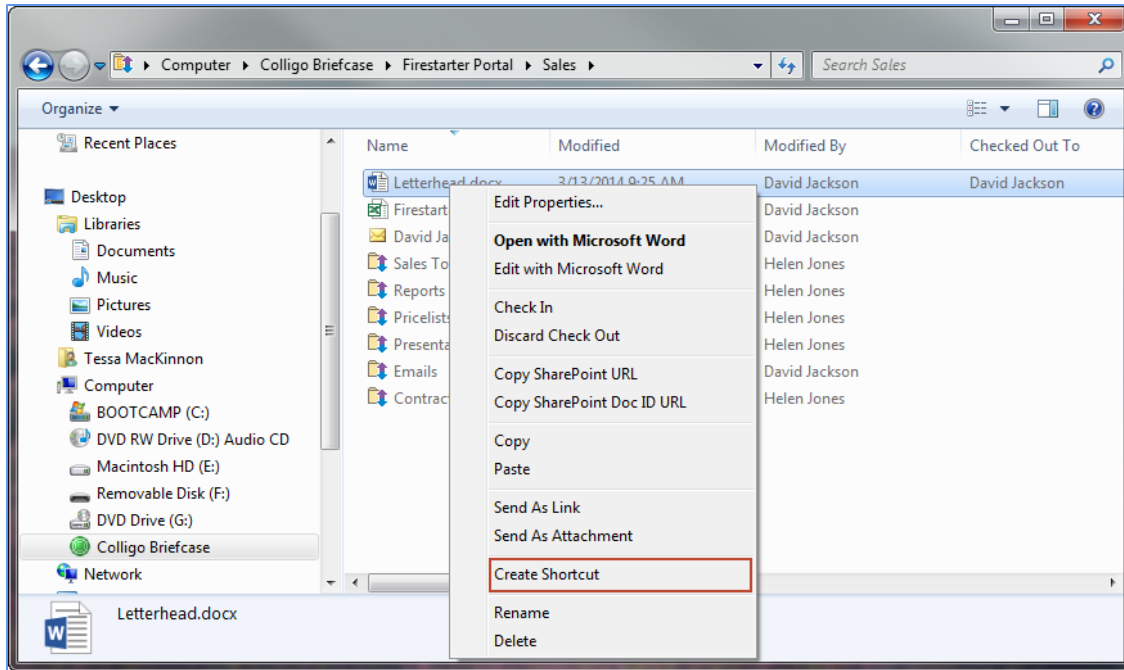
Editing Content

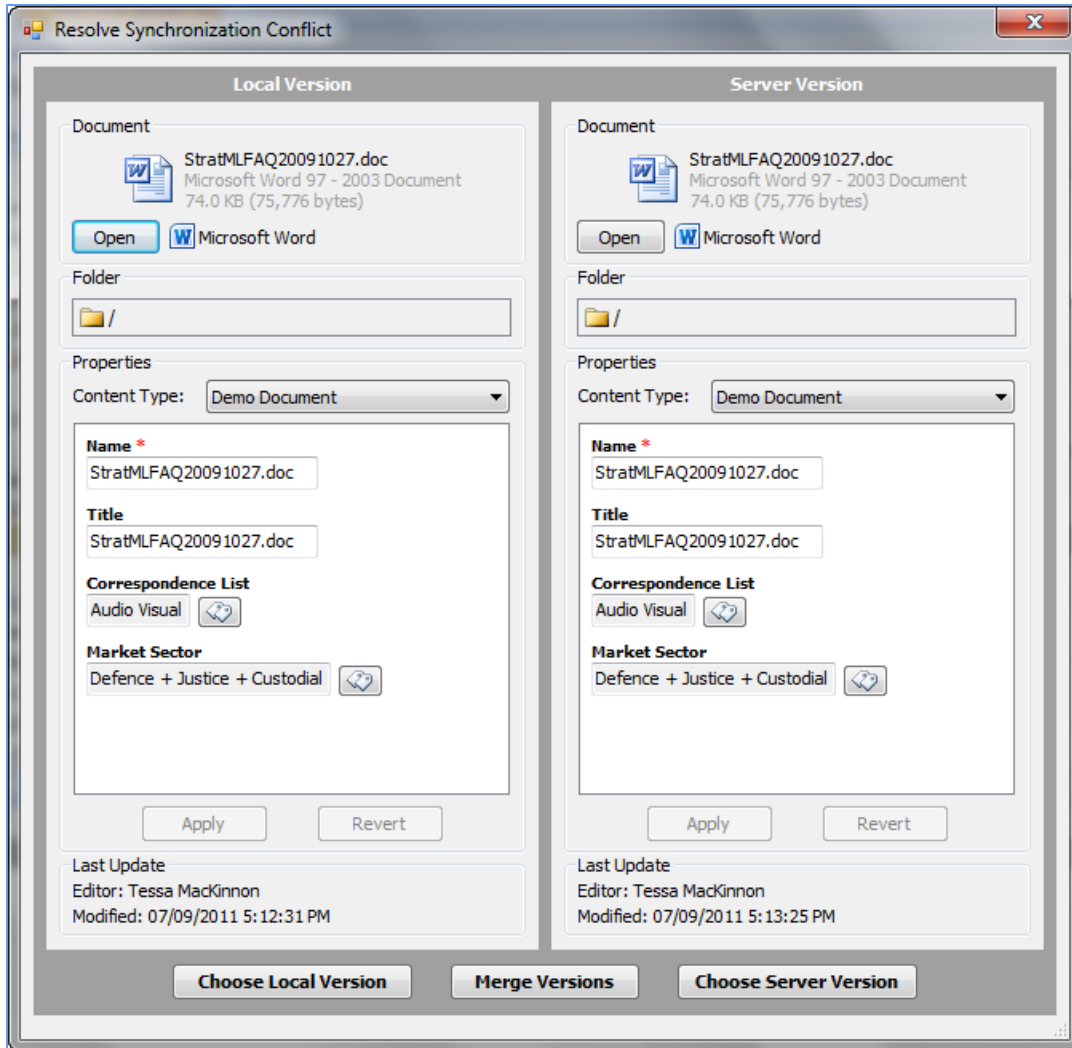To edit an item in a library/folder, double-click it to open the item in its native program. Edit the item as preferred, save it, and close it.

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:

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:

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**.
2. 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

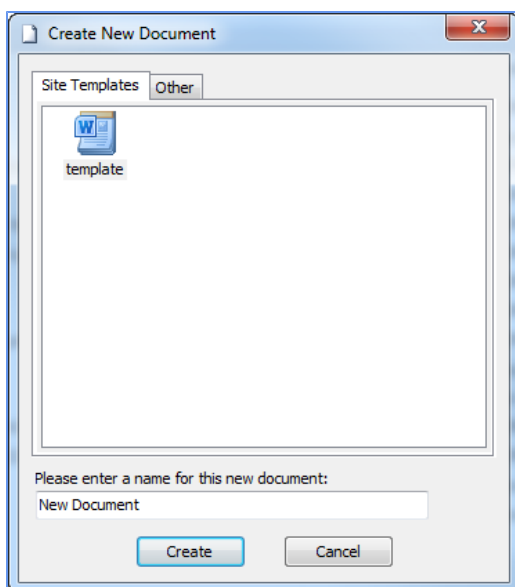### Adding a New Document to a List/Library

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

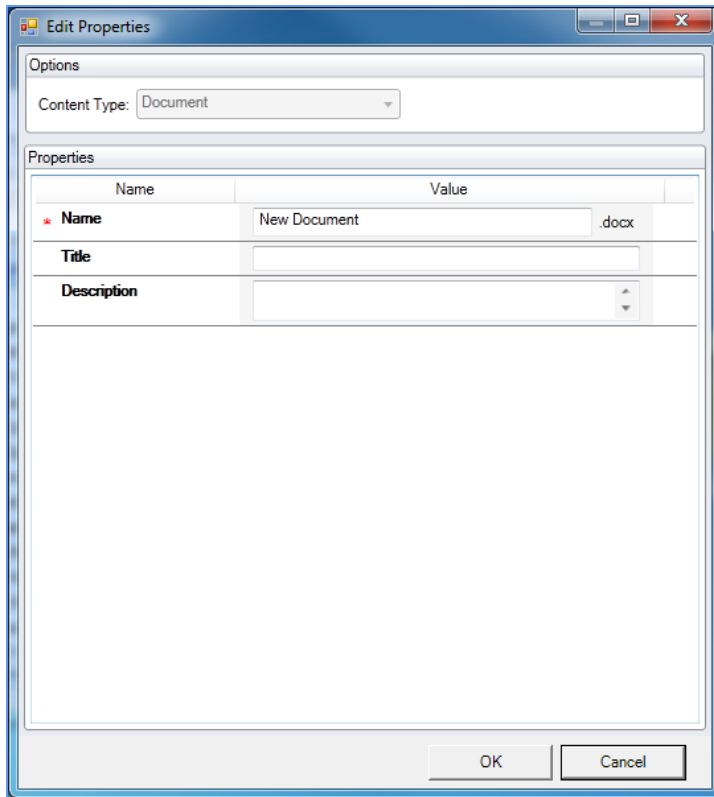1. From the **File** menu, choose **New > New Document**:
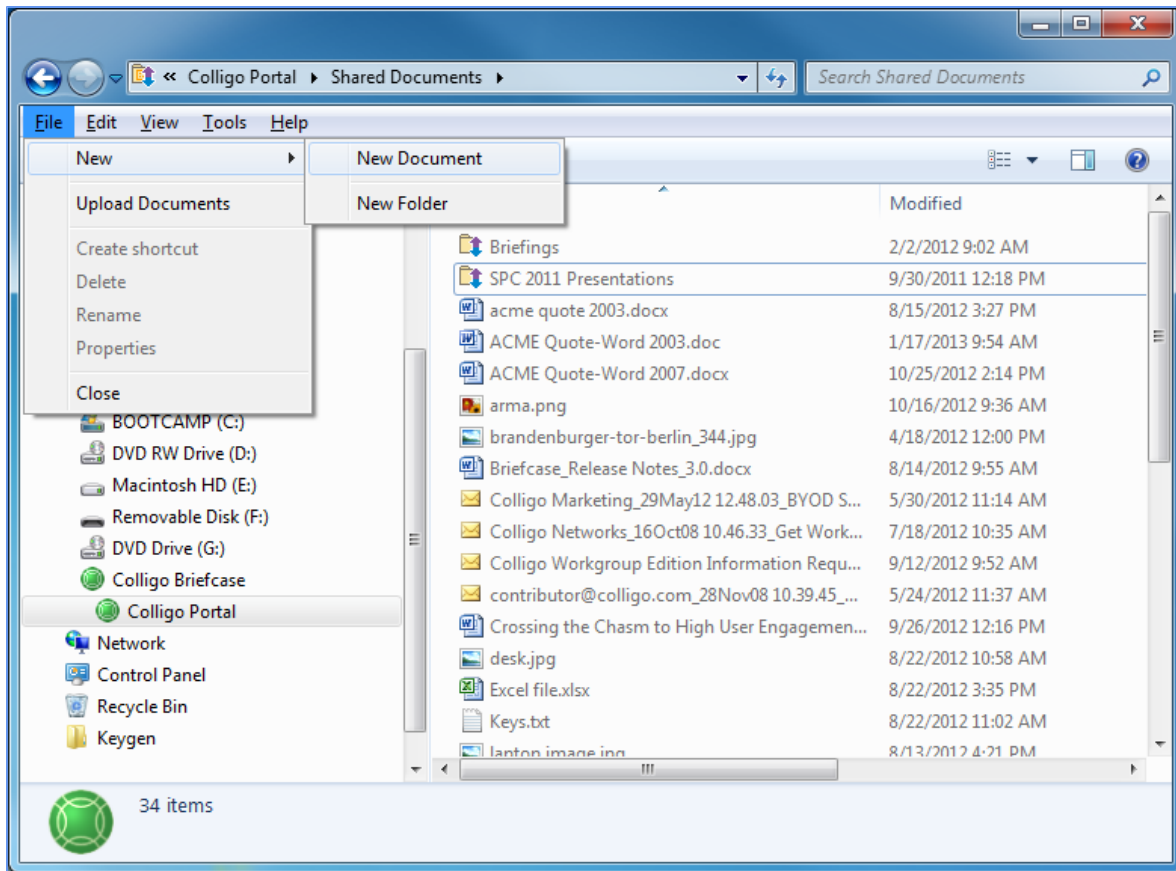
NOTE: if you cannot see the **File** menu, press **Alt** key to display it.

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**.

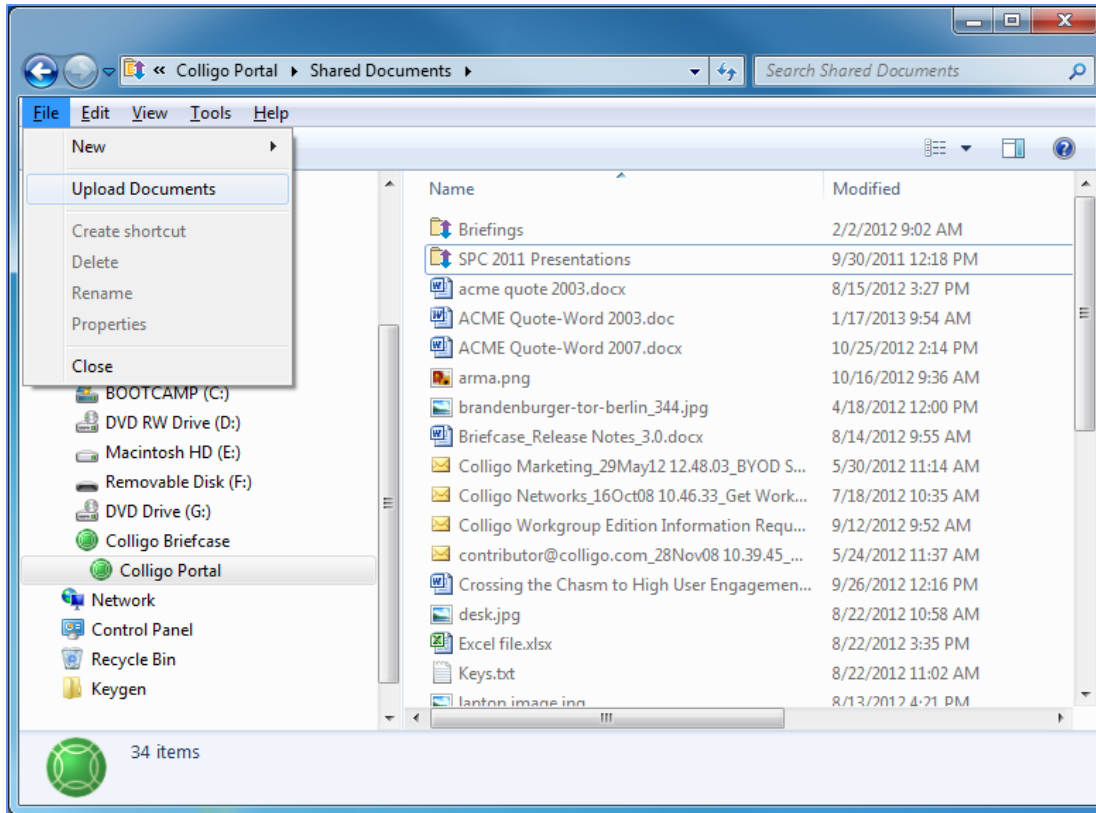The **Edit Properties** dialog displays.

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**:

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.

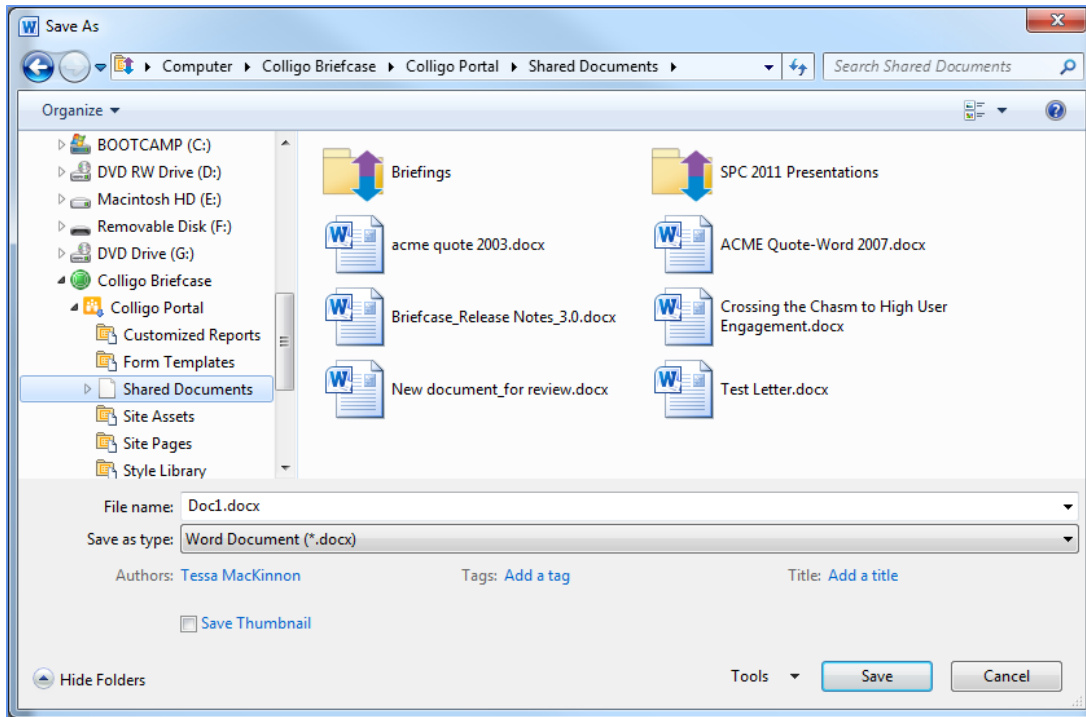2. The **Edit Properties** dialog displays. Edit as preferred and click **OK**.

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**:


3. 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:
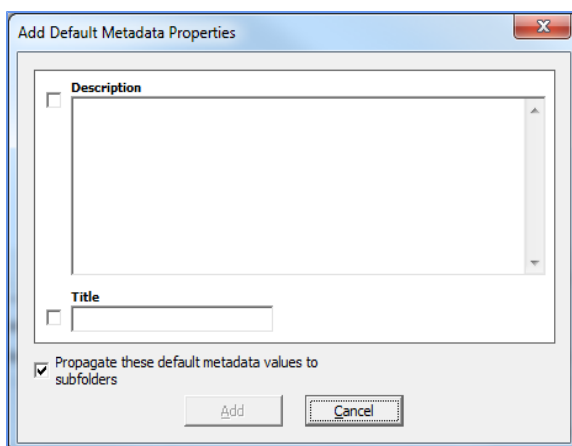
1. From the **File** menu, choose **Default Metadata Values**.

   The **Default Metadata Values** dialog displays:
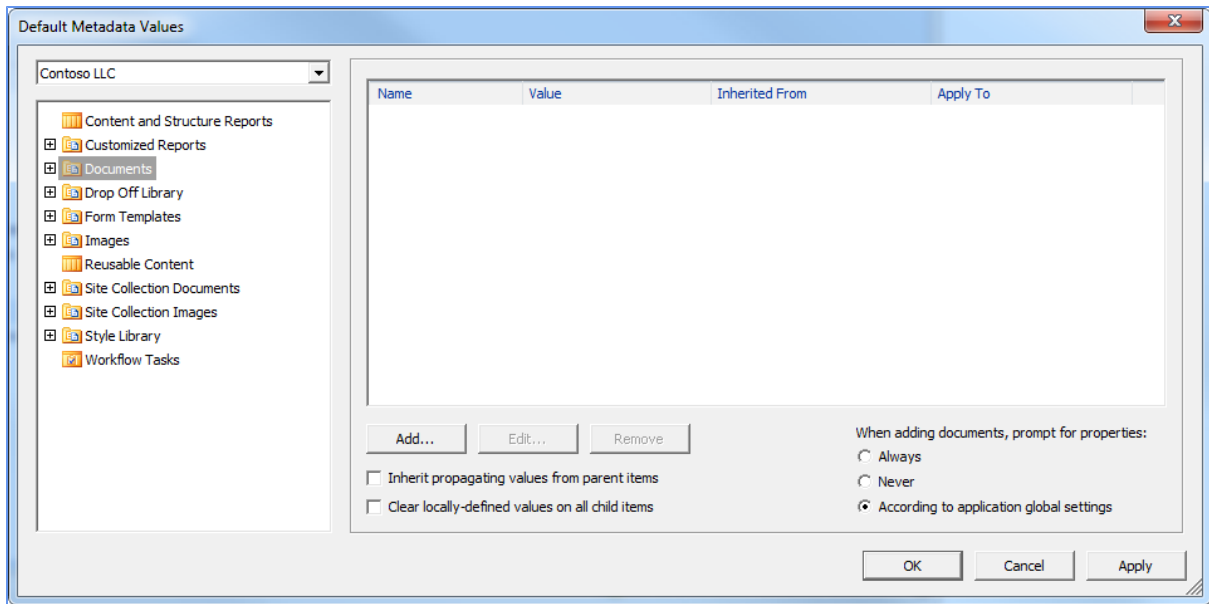
2. Select the site and library/list that you want to configure.
3. To add a metadata tag, click **Add**.

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

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