Briefcase for Mac

User Guide

Colligo

Contents

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Introduction

Welcome to Colligo Briefcase for Mac, the enterprise solution for SharePoint access from any Mac desktop or laptop device.

Colligo Briefcase for Mac lets you securely store, sync, and view SharePoint content on your Mac devices. Users can access and share files, lists, images, documents and emails. Synchronize SharePoint content to your device automatically, for instant access, even when offline. Colligo Briefcase is as easy to use as consumer file-sharing applications, encouraging SharePoint adoption while ensuring the security of your enterprise content.

Key Features

- Keep SharePoint content offline for fast access, even when you are not on the network
- Share files easily using links
- View document and file properties
- Drag-and-drop email from any mail client

Devices Supported

Any Mac running OSX 10.7, 10.8, or 10.9
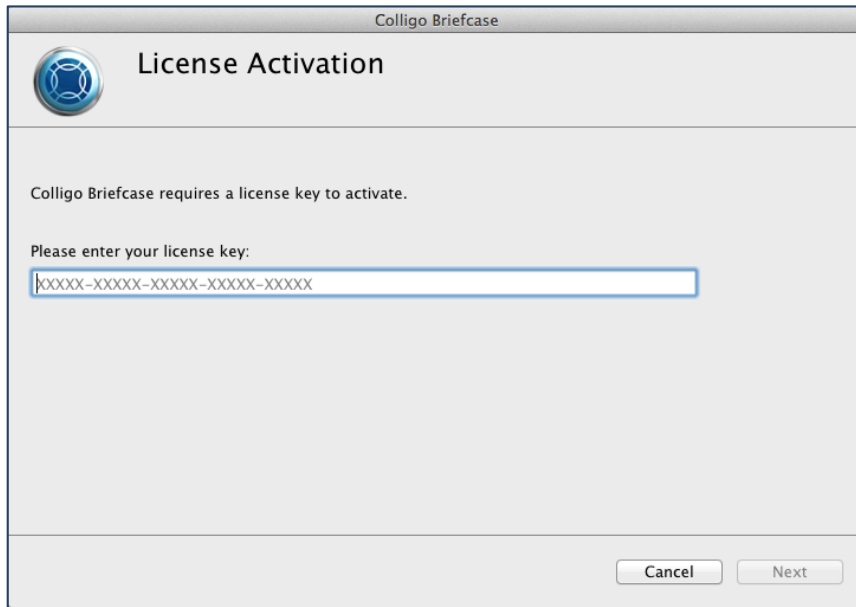
SharePoint Platforms Supported

- SharePoint 2007
- SharePoint 2010
- SharePoint 2013
- SharePoint Online (Office 365)

Installing Briefcase for Mac

To install Colligo Briefcase for Mac:

1. Double-click the .dmg file to launch the installer.
2. Drag and drop the **Briefcase for Mac** icon into the **Applications** directory.
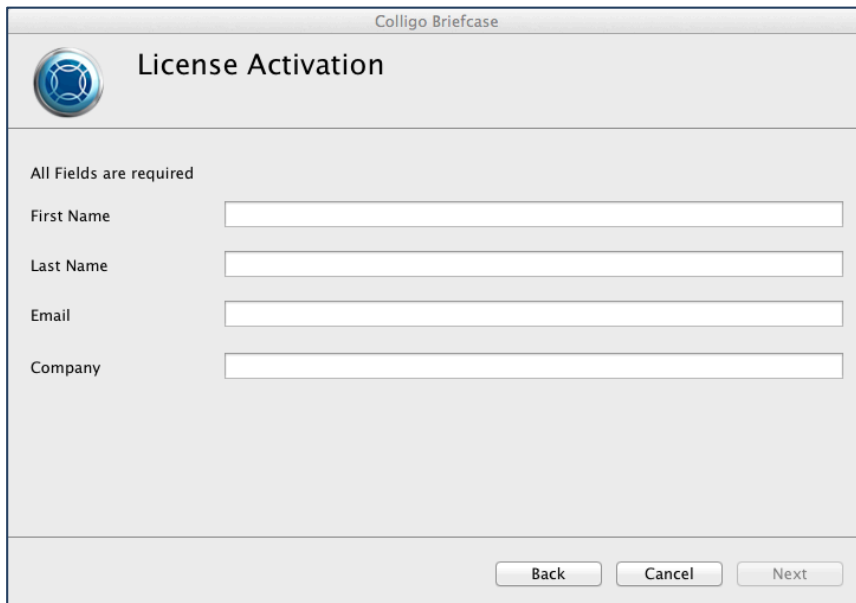3. Double-click to launch the product.
   The **License Activation** dialog displays:

4. Enter your license key and click **Next**.
   The following dialog displays:

5. Enter the fields above.
6. Click **Next**.
7. In the subsequent screen, click **Close** or click **Add Site**.
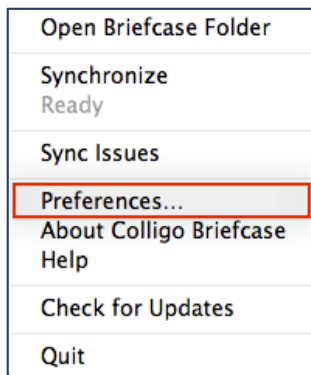
8. Please see **Adding a Site**.

 The Briefcase for Mac icon displays in the top menu bar . You can now set your Preferences and connect to SharePoint sites.
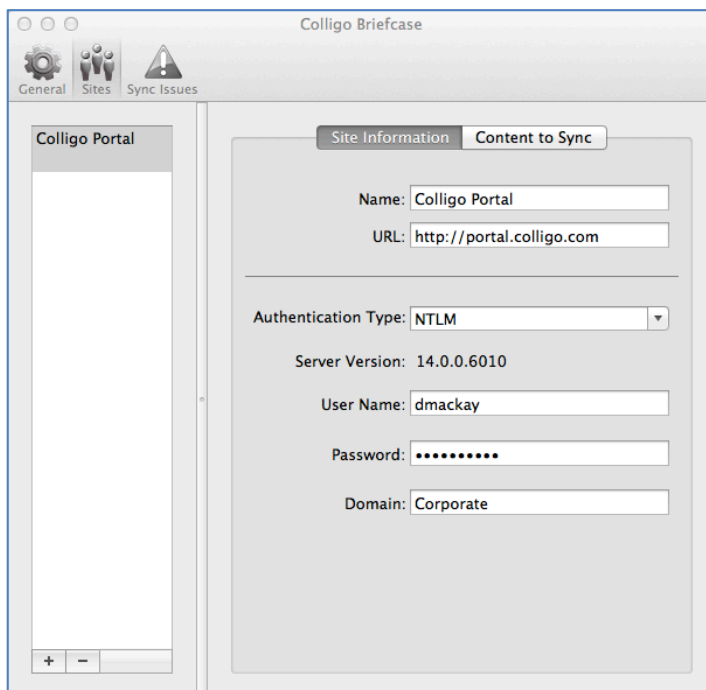
Managing SharePoint Sites

Colligo Briefcase lets you add, edit, sync, and remove SharePoint sites.
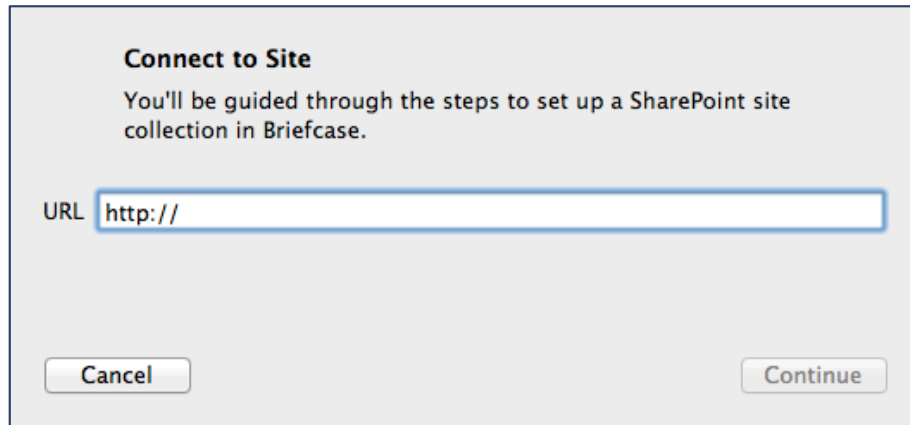
Adding a Site

1. In the menu bar, click the Colligo icon and choose **Preferences** in the drop-down menu:

 The **Sites** screen displays.

2. Click the + icon at the bottom of the list.
 The **Connect to Site** dialog displays:
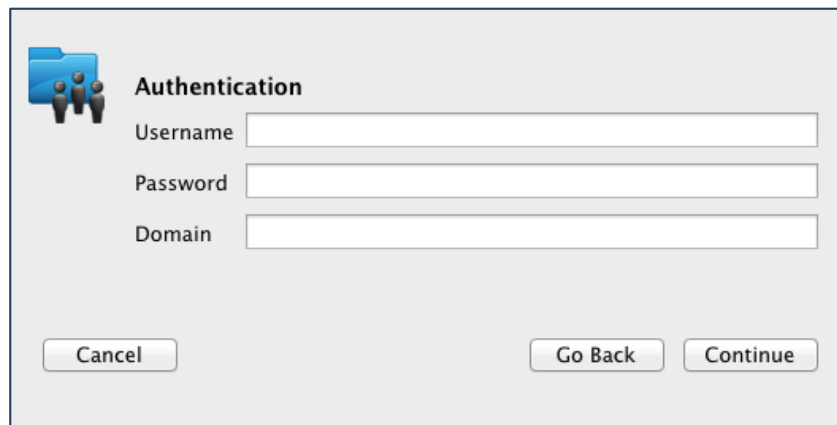
3. Enter your site **URL** and click **Continue**.

    The **Authentication** dialog displays:

4. Enter your **Username**, **Password**, **Domain**, and click **Continue**.

    NOTE: depending on the authentication method you are using, your screen may display other fields.

5. The **Summary** screen displays. This is where you can select which libraries you want to sync to your machine:
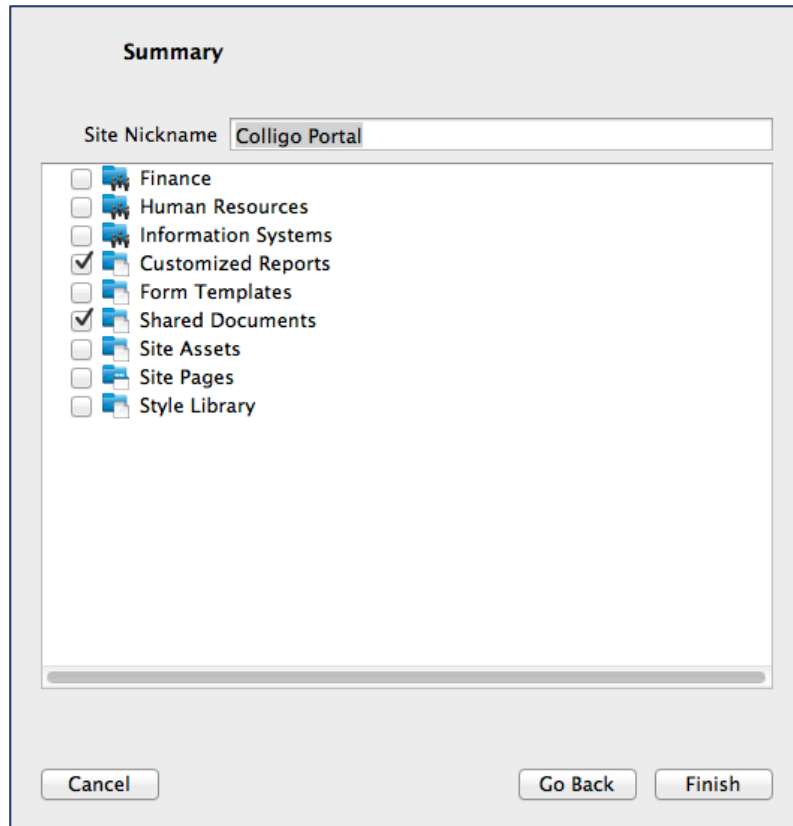
6. Once you have chosen which libraries and subsites you want to sync, click **Finish**.

    The SharePoint content you have synced displays in the Finder:

Editing Site Content

After you initially add a site, and sync specific libraries, you can then change which content you want to sync to your machine.

1. In the **Sites** list, select the site you want to edit and click the **Content to Sync** tab:

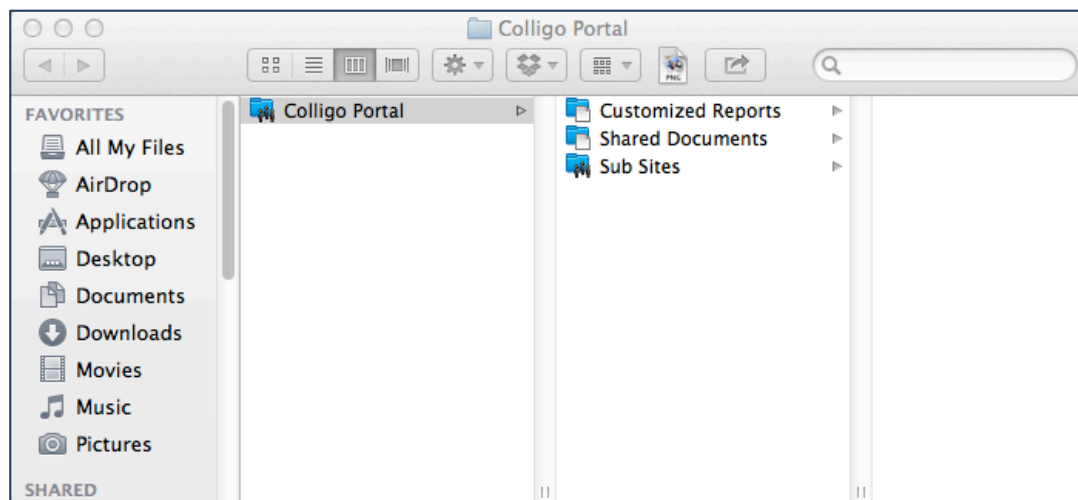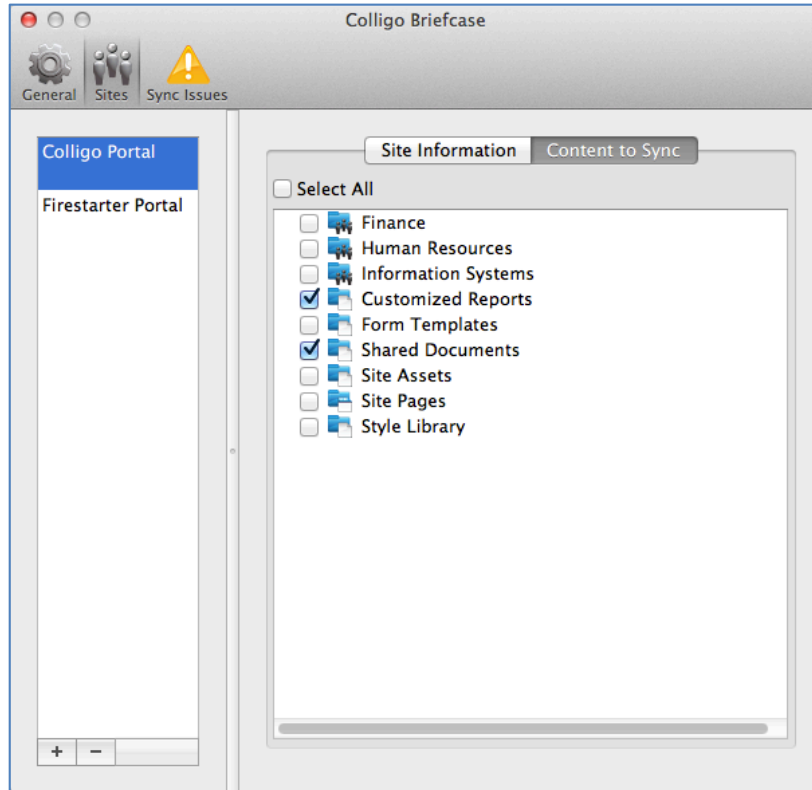2. Use the **Select All** checkbox, or individual checkboxes to select which lists and libraries you want to sync.
3. In the menu bar, click the Colligo icon and choose **Synchronize**.
The change in content is reflected in the Finder view.

Syncing a Site

After you have added a site, the default content syncs and is available on your local machine. You can then set your Sync Interval to control how frequently your content is synced.

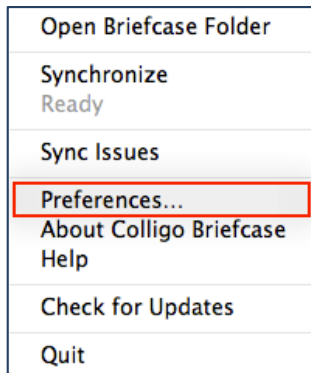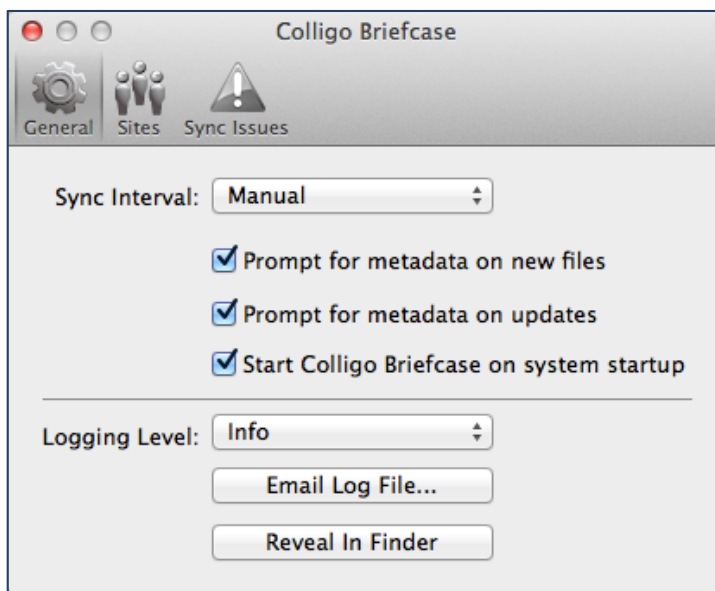1. In the menu bar, click the Colligo icon and choose **Preferences** in the drop-down menu:

2. Click the **General** tab:

3. From the Sync Interval drop-down, choose one of the following options:
   a. Manual
   b. 15 min
   c. 30 min
   d. 1 hour

If you choose **Manual**, you must always click the Colligo icon and choose **Synchronize**.

Deleting a Site

To delete a site:

1. Select a site in the **Sites** list.

2. Click the minus icon at the bottom of the list.
   The site is removed from the list and all downloaded content is removed from your local machine.

Viewing Site Content

Colligo Briefcase for Mac integrates with Finder. To display SharePoint sites that are connected to Briefcase:

In the menu bar, click the Colligo icon and choose **Open Briefcase Folder** in the drop-down menu:
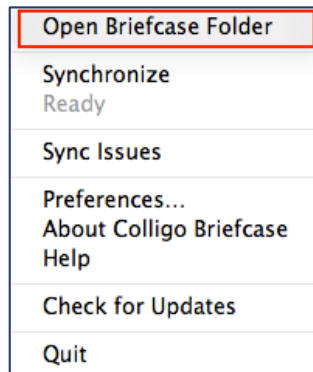
You can choose the view you want to display the site content in, such as the list view:
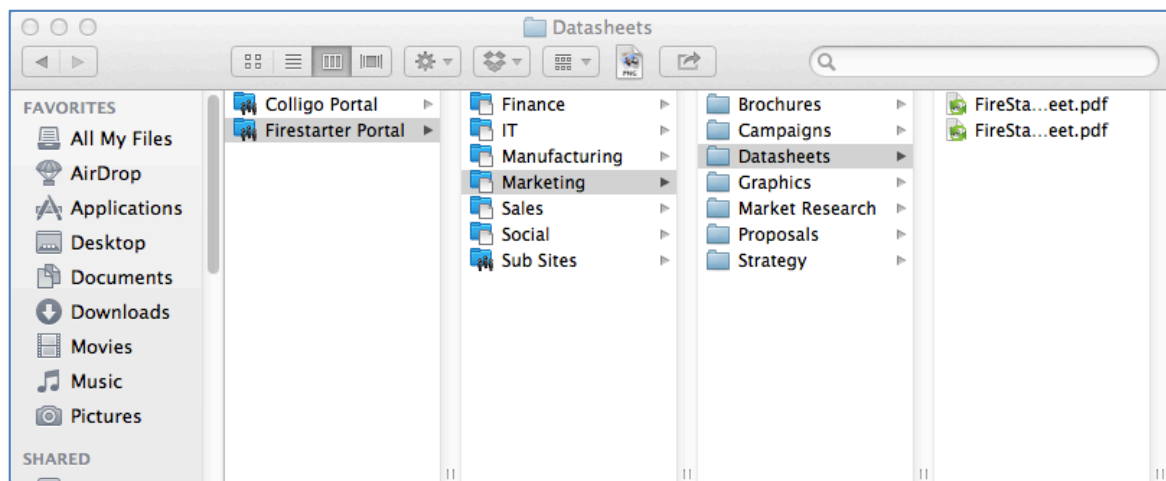
Or the cover view:
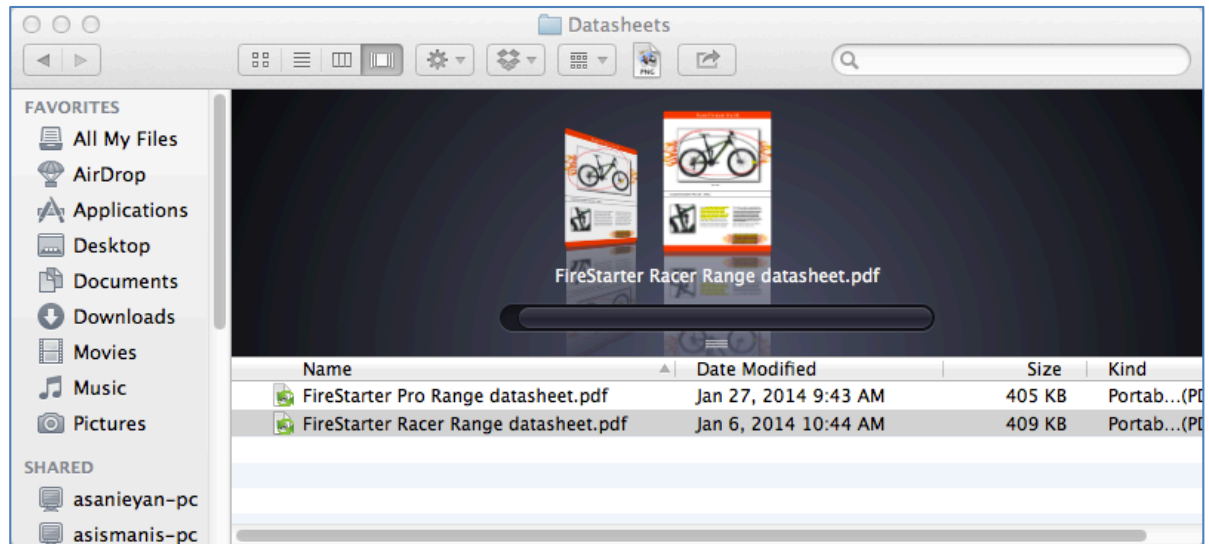
All items will have an icon overlaid over the file type icon to indicate one of the following states:

Status	Icon
Synced to your local machine	
Pending synchronization: your change has not yet been synced to SharePoint	
Checked out to you	
Checked out to another user	

Viewing Items

To view an item, double-click it to launch it in its own screen:
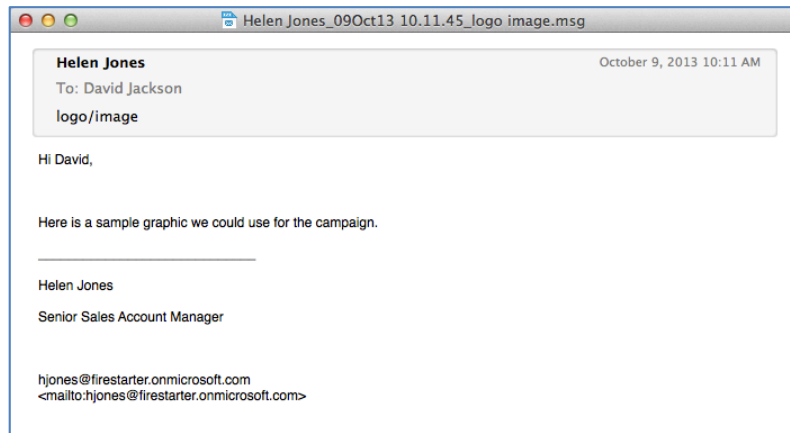
You can also preview the file in Finder by selecting it in the list view:

Viewing and Editing Item Metadata

To view or edit an item's metadata:

1. Right-click it and select **Briefcase > Edit Metadata**:
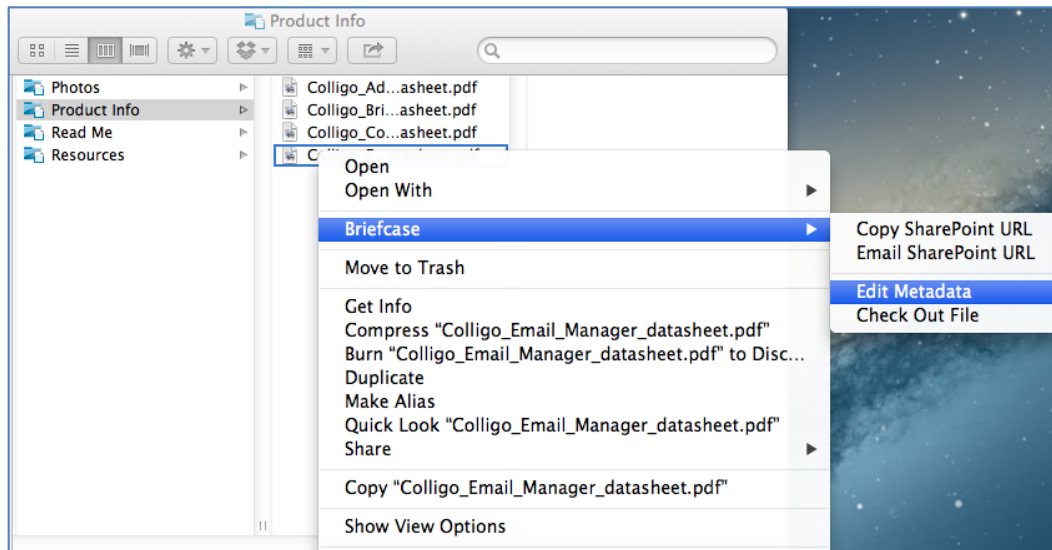
The metadata displays in a new window:

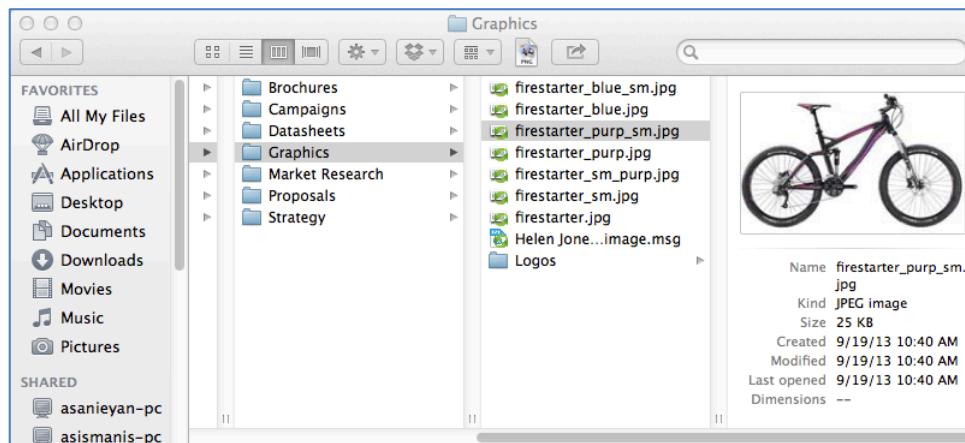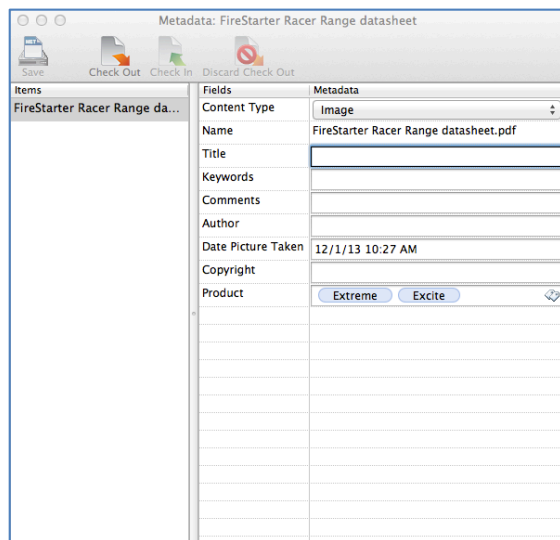2. Depending on the type of field, you can double-click it to make it editable, choose from a drop-down menu, or click the metadata tag to add a new term.
   NOTE: If the field is protected, there is no result from a double-click.
   NOTE: Required fields display in bold, and must be filled in before the metadata editor can be closed.

3. Click **Save** once you have completed the edit.

Copying a SharePoint URL

To copy the SharePoint URL of an item's location, right-click the item and select **Briefcase > Copy SharePoint URL** from the contextual menu:
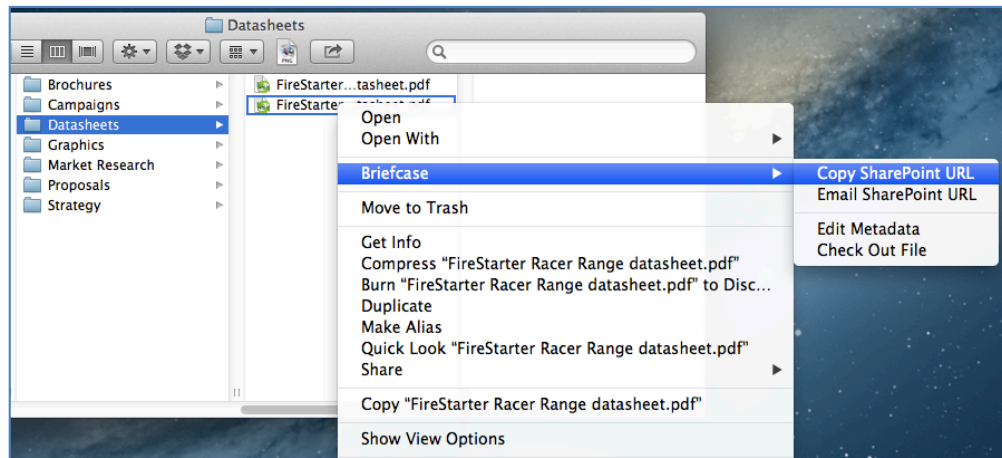
Emailing a SharePoint URL

To email the SharePoint URL of an item's location, right-click the item and select **Briefcase > Email SharePoint URL** from the contextual menu:

Checking an Item Out or In

You can check an item out by right-clicking it, selecting **Briefcase** in the contextual menu, and selecting **Check Out File**:
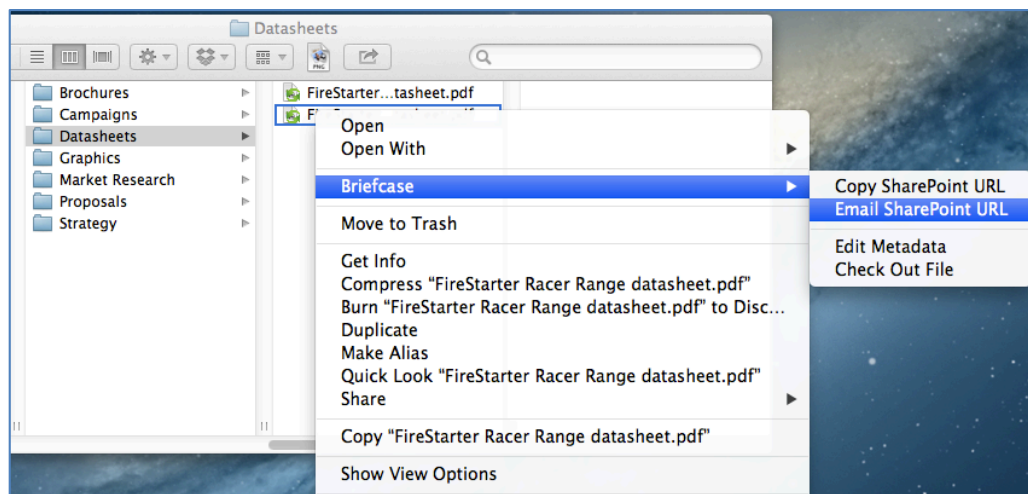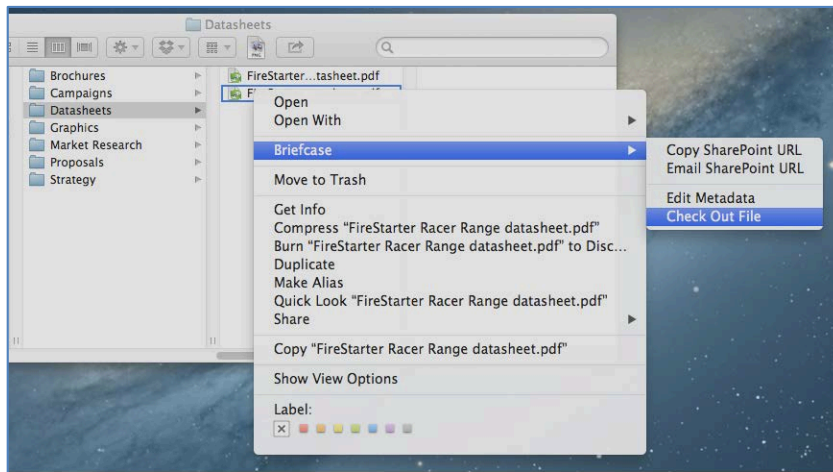

When an item is checked out to you, an orange arrow is added to the bottom left of the item's icon.

When an item is checked out to another person, a red arrow is added to the bottom left of the item's icon.

You can also check items in and out from the metadata screen:
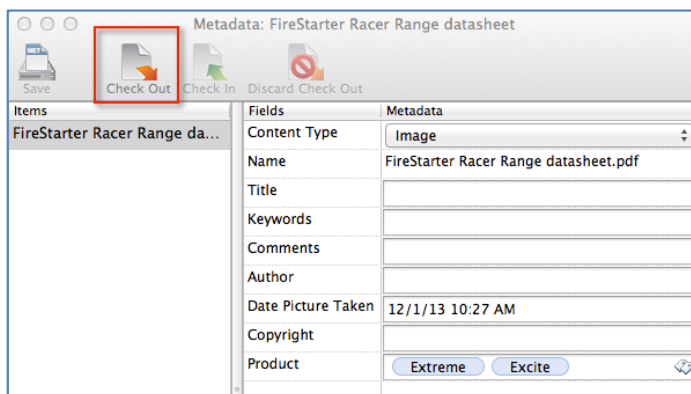
If your library has versioning enabled, when you check an item back in, the following screen displays:
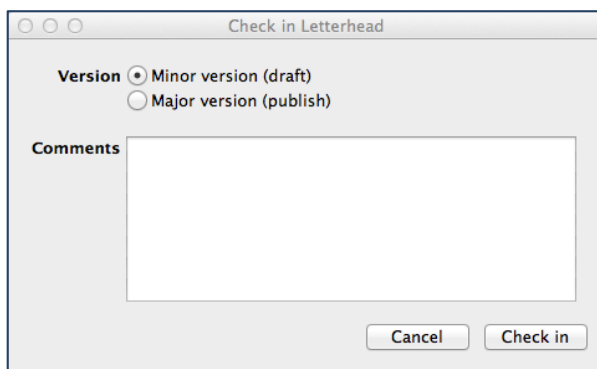
If applicable, choose a version, enter any relevant comments, and click **Check In**.

Adding and Editing Site Content

Creating a New Folder

To create a new folder in a library, right-click and select **New Folder** from the contextual menu:
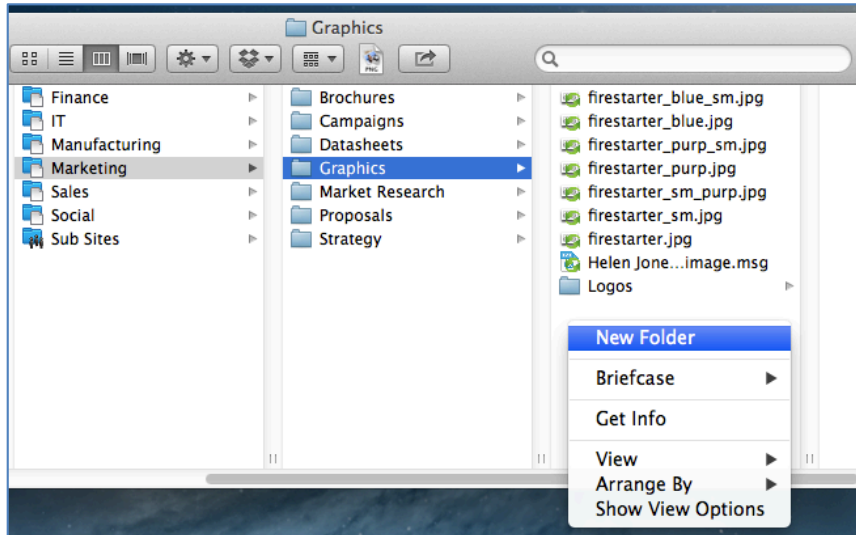
Adding Documents

To add new content to your SharePoint document libraries:

1. Drag-and-drop one or more items into the library.
   The metadata prompt displays:

2. Edit the fields as preferred.
3. Click **Save**.
   If you are connected to your SharePoint network, the file is synced to the SharePoint site.

Adding Emails

You can drag-and-drop an email from any mail client into a Briefcase for Mac location.

1. Drag-and-drop your email to your preferred SharePoint location.
   The metadata prompt displays.
2. Edit the prompt as required and close the window.
   The item is uploaded to SharePoint on the next sync.

Moving Items Within Libraries

To move an item from one library to another:
1. Drag-and-drop the item into the preferred location.
   The metadata prompt displays.
2. Edit the prompt as required and close the window.
   The item is uploaded to SharePoint on the next sync.

Overwriting Documents

If you drop a document into a library that has an existing document with the same name, the following prompt displays:

If you choose **Keep Both**, the new file is appended with a number at the end of the name and saved into the directory. The metadata prompt displays.

If you choose **Replace**, the new file overwrites the existing one. The metadata prompt displays with existing metadata. Edit the fields as preferred and click **Save**.

Adding a new Version

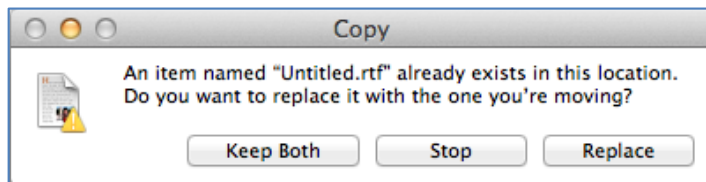If you have a library with versioning enabled, anytime you open, edit, and save an existing item back to its location, the following dialog displays:
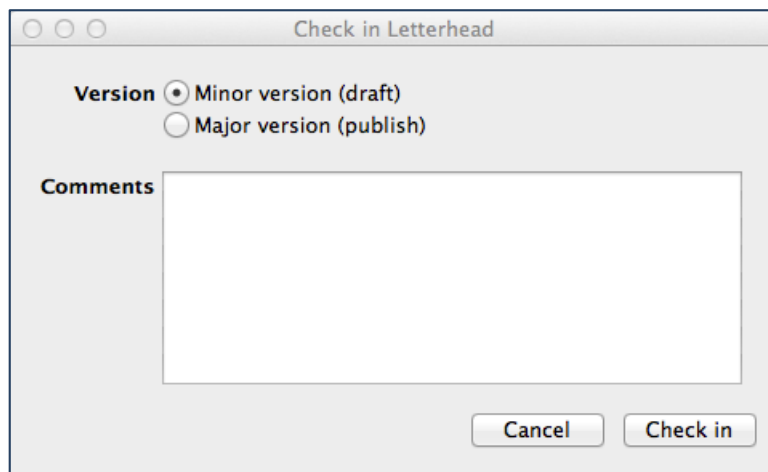
If applicable, choose a version, enter any relevant comments, and click **Check In**.

Editing Items

To edit an item:
1. Double-click it to launch it in its native application.
2. Make your edits and click Save.
   The changes are synced to SharePoint on the next sync interval.

Renaming Items

To rename an item:
1. Click the file name to make it editable.
2. Make edits as necessary.
   The changes are synced to SharePoint on the next sync interval.

Deleting Items

To delete an item:
Right-click and item and choose **Move to Trash** from the contextual menu.
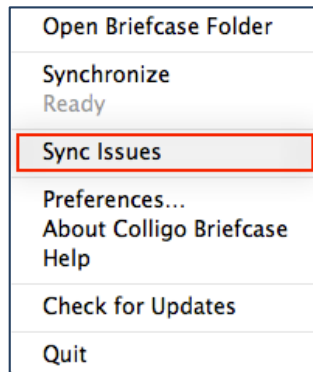**OR**
Drag the item into the Recycle bin.

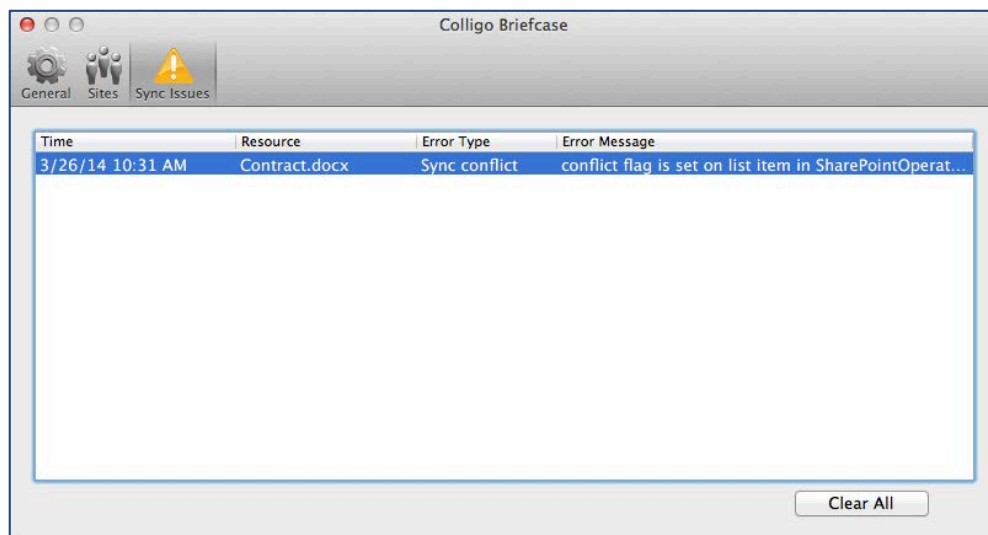The changes are synced to SharePoint on the next sync interval.

Resolving Conflicts and Managing Sync Issues

If there is a conflict between the item you have on your local machine and the item on SharePoint, you can resolve it in the **Sync Issues** panel.
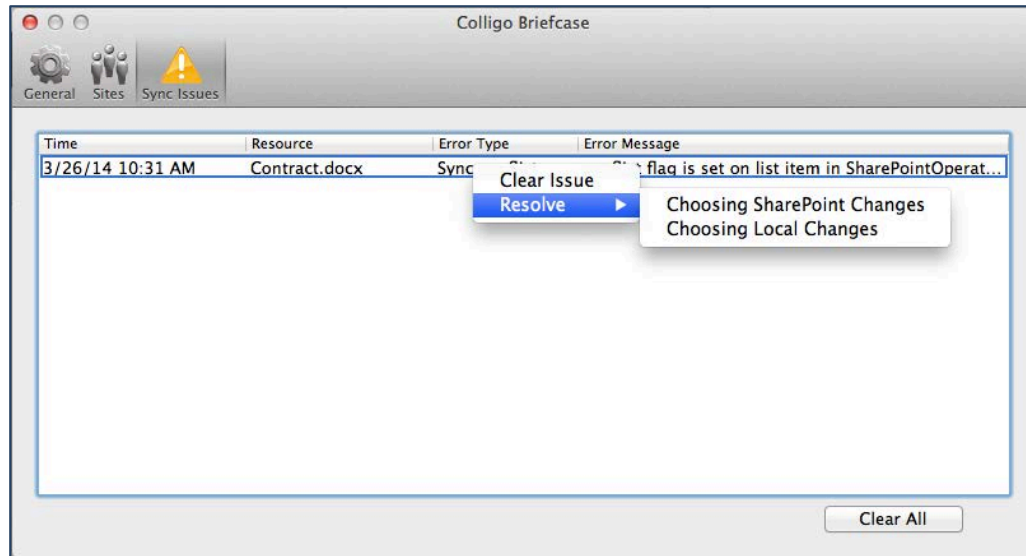
1. In the menu bar, click the Colligo icon and choose **Sync Issues:**

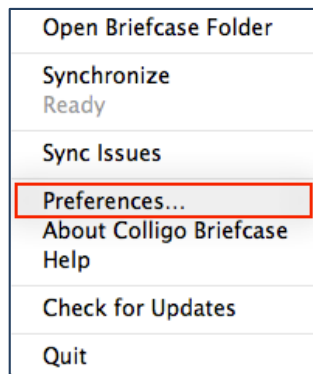The **Sync Issues** panel displays:

2. Right-click on the sync issue and choose if you want to keep the local or the SharePoint changes:

Any additional sync issues can be reviewed and cleared by clicking **Clear All**.
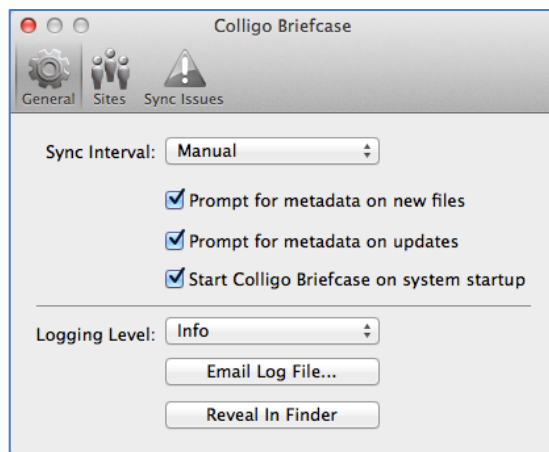
Configuring General & Advanced Preferences

1. In the menu bar, click the Colligo icon ⊗ and choose **Preferences** in the drop-down menu:

Open Briefcase Folder
Synchronize Ready
Sync Issues
Preferences...
About Colligo Briefcase
Help
Check for Updates
Quit

    The **Preferences** screen displays.
2. Click the **General** icon:

3. Choose your **Sync Interval** from the following options:
    a. **Manual**
    b. **15 min**
    c. **30 min**
    d. **1 hour**
4. Check the box if you want a metadata prompt when you a file is added and/or when a file is updated.
5. Check the box if you a metadata prompt when you edit or update a file.
6. Check box if you want to launch Briefcase for Mac when your system starts.
7. In the Logging Level section:
    a. Set your **Logging Level** by choosing from the following options:
        i. **None**
        ii. **Errors**
        iii. **Warning**
        iv. **Info**
        v. **Verbose**
    b. Email your log file by clicking **Email Log File**.
    c. Click **Reveal in Finder** to see the location of your saved log file.

Uninstalling Briefcase for Mac

To uninstall Briefcase for Mac:

1. Double-click the .dmg file to open:
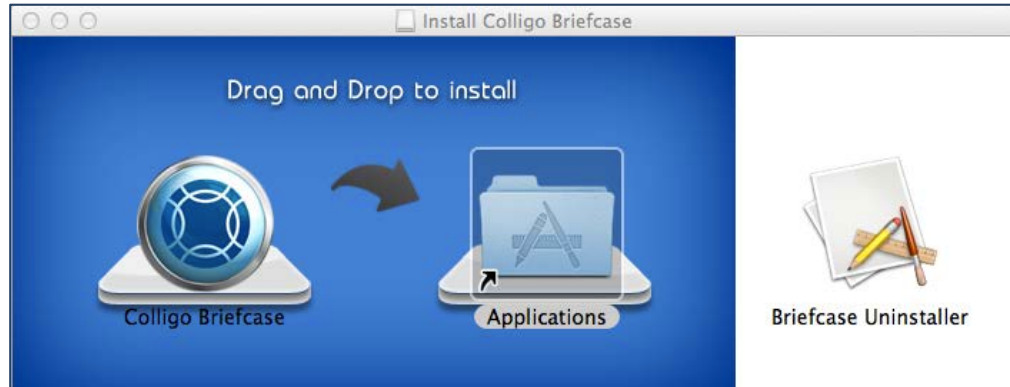
2. Double-click **Briefcase Uninstaller**.
    Briefcase is removed from your machine.