

# Briefcase iOS 3.7.0

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Enterprise, Pro, and Lite Editions

User Guide  
iPhone and iPod Touch



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## Introduction

Welcome to Colligo Briefcase, the enterprise solution for SharePoint access from your iPad, iPhone, and iPod Touch.

Colligo Briefcase lets you securely store, sync, view, edit, and find SharePoint content on your iPad, iPhone or iPod Touch. Access and share files, lists, images, documents and emails. Synchronize SharePoint content to your iPad, iPhone or iPod Touch 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.

- View SharePoint files directly on your iPad and iPhone, including Office (Word, Excel, Outlook, PowerPoint) documents, PDFs, images, emails and more
- Keep SharePoint content offline for fast access, even when you are not on the network
- Share files easily using links
- Find your content fast with powerful search
- Open and edit files in applications such as Documents to Go or GoodReader
- Upload files and photos to SharePoint
- View and edit document and file properties, including metadata
- Enter and submit InfoPath forms, with support for signatures
- Choose content type and enter metadata when uploading items
- Secure access to Briefcase using passcode protection

Extensive “smart caching” capabilities let you download only the content you need, reducing device storage requirements. Sync specific libraries or lists from SharePoint. You can also set alerts to monitor changes to files or folders in SharePoint. Colligo Briefcase works with your current SharePoint 2007, SharePoint 2010, or Office 365 sites, and doesn’t require anything to be installed on the server.

Colligo Briefcase works seamlessly with all of Colligo’s email management solutions for desktops, laptops, and smartphones, to provide the only unified, centrally-managed, enterprise-class solution for email and document management in SharePoint, including online and offline access, on-premise or in the cloud.

## Key Features

- View SharePoint files directly on your mobile device, including Office (Word, Excel, Outlook, PowerPoint) documents, PDFs, images, emails and more
- Keep SharePoint content offline for fast access, even when you are not on the network
- Share files easily using links
- Find your content fast with powerful search
- Open and edit files in applications such as Documents to Go or GoodReader
- Upload files and photos to SharePoint
- View and edit document and file properties, including metadata
- Enter and submit InfoPath forms, with support for signatures
- Secure access to Briefcase using passcode protection

## Benefits

- Provides a quick and easy-to-understand touch interface to SharePoint
- Ensures access to the very latest documents and information
- Reduces distribution of paper documents
- Keeps mobile users productive

- Gives offline access to documents, reducing network and data plan usage
- Allows mobile workers to fill in and submit electronic forms, reducing the need for paper-based forms and expediting business processes
- Reduces the need for laptops for document viewing and presentations
- Drives user adoption of SharePoint by improving ease of use

## Devices Supported

**NOTE:** All devices require IOS7 or higher

- iPad (2<sup>nd</sup> generation and above) and iPad Mini
- iPhone (4 and above)
- iPod Touch (4<sup>th</sup> generation)

## SharePoint Platforms Supported

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

## Colligo Briefcase Lite

Colligo Briefcase Lite is downloadable from the Apple app store and is free for personal use. The following features are not enabled in the Lite version:

- Adding more than one site
- Setting a global sync limit to over 50 MB
- Specifying which site lists and libraries to sync
- Setting a Passcode Lock
- Editing item metadata
- Deleting items and deleting attachments in list items
- Checking items in and out
- Creating new list items
- Uploading new items to SharePoint
- Creating and editing InfoPath forms
- Metadata and content type prompting

## Colligo Briefcase Pro

Colligo Briefcase Pro is available from the Apple store and does not have the above limitations.

## Colligo Briefcase Enterprise

Colligo Briefcase Enterprise is available from Colligo under license. Contact Colligo for more information on how to obtain an enterprise license for your company or organization. To learn more about Colligo Briefcase Enterprise, visit <http://www.colligo.com/briefcase-trial>.

Colligo Briefcase Enterprise provides:

- Annotate PDFs including highlights, notes, strikethrough, adding text, and freehand drawing
- Unlimited sync storage capacity
- Unlimited number of sites and lists to sync
- Additional security
  - Provides an application-specific lock-code for extra level of security; data is wiped after 10 consecutive failed attempts
  - Ability to remotely wipe application data from any device [via MDM systems]
  - Utilizes hardware-based encryption (AES-256) for all local data
  - SharePoint credentials stored in the KeyChain, the highest form of trust-chain security
- Supports Colligo Administrator for centralized management of sites and settings
- Turnkey enterprise deployment services, software maintenance and support
- Optional re-branding

## Colligo Administrator

Colligo Briefcase Enterprise works seamlessly with Colligo Administrator, a server-based console tool for the configuration and management of Colligo's desktop and mobile applications. Colligo Administrator enables organizations to:

- Centrally configure all Colligo Briefcase user settings on the iPad/iPhone/iPod
- Push out SharePoint sites and document libraries with zero user interaction
- Monitor SharePoint and Colligo Briefcase usage via reports and metrics
- Reduce deployment time and streamline the provisioning of enterprise iPads/iPhones/iPods

## Overview

This user guide explains how to use Colligo Briefcase on iPhone and iPod Touch. View the user guide in Colligo Briefcase on an iPad for instruction on how to use Colligo Briefcase on iPad.

## Installing Colligo Briefcase Lite or Pro

To install Colligo Briefcase Lite or Colligo Briefcase Pro, connect to the App Store and download the latest version to your iPod/iPhone. After Colligo Briefcase is installed, tap the **Colligo Briefcase Lite** icon



or the **Colligo Briefcase Pro** icon



to open the application. You can now add a SharePoint site.

## Setting Language Preference

Briefcase is now available in the following languages: French, German, Spanish, Italian, Japanese, and Chinese.

To set the language for the app:

1. In the **Settings** app, tap **General > International**.
2. On the **International** screen, tap **Language**.
3. Tap the language of choice in the list.
4. Click **Done**.  
Briefcase now displays in the supported language you have chosen.

## Managing SharePoint Sites

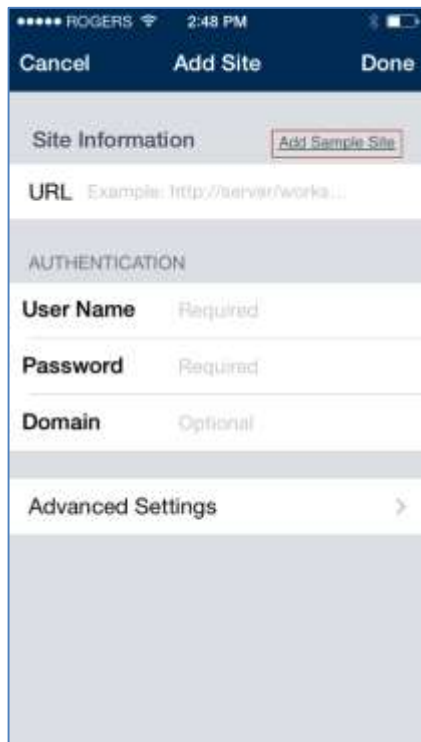
Colligo Briefcase lets you add, edit, and remove SharePoint sites.

### Using the Colligo Sample Site

Colligo has provided a sample site that you can add when you first launch the product. This site provides you with read-only content that allows you to see how Briefcase works, even if you don't have your own SharePoint site to add.

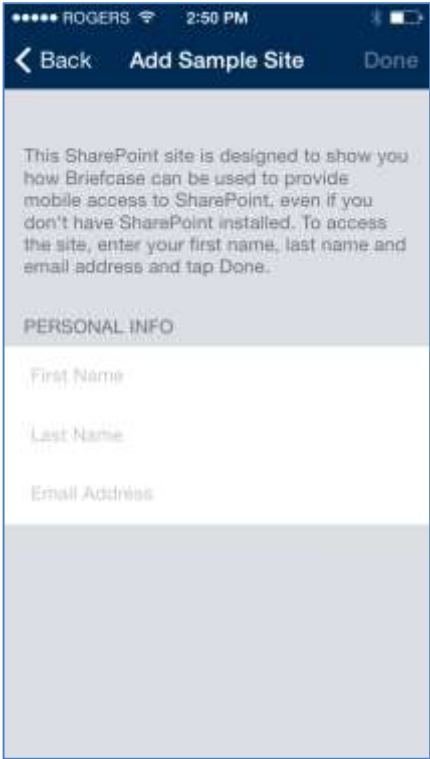
To launch the sample site:

1. In the **Add Site** dialog, tap the **Add Sample Site** link:



The **Add Sample Site** dialog displays:





2. In the dialog, enter your **First Name**, **Last Name**, and **Email Address**.
3. Tap **Done**.

The site begins to sync and the lists and libraries for the sample site display:

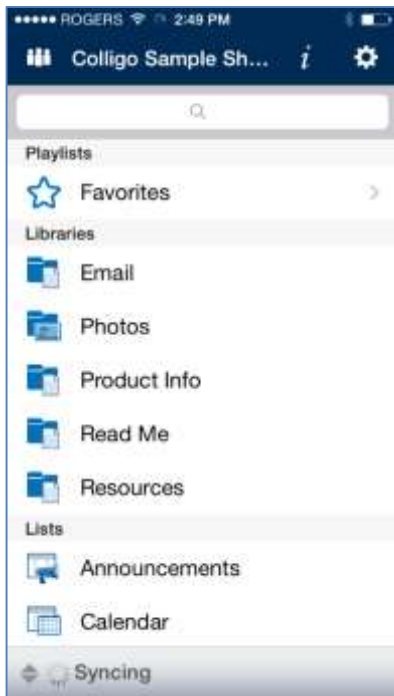


4. Tap to select or deselect a list or library that you want to sync. Tap the checkmark at the top of each list to select all or deselect all.

The following lists are disabled by default and need to be enabled manually:

- a. **Form Templates**
  - b. **Site Assets**
  - c. **Site Pages**
  - d. **Style Library**
5. Choose **Later** or **Now**. If you choose the **Later** option, you can revisit this dialog and set different sync options.

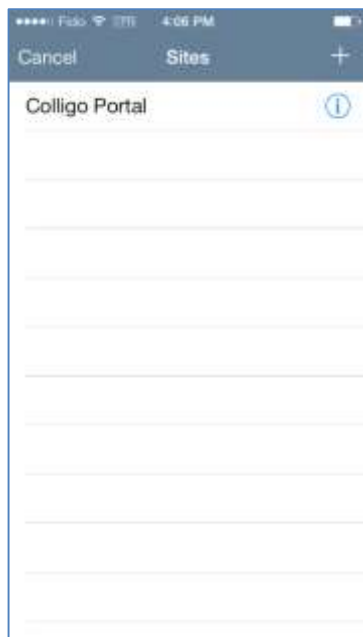
The site syncs and the lists and libraries display:




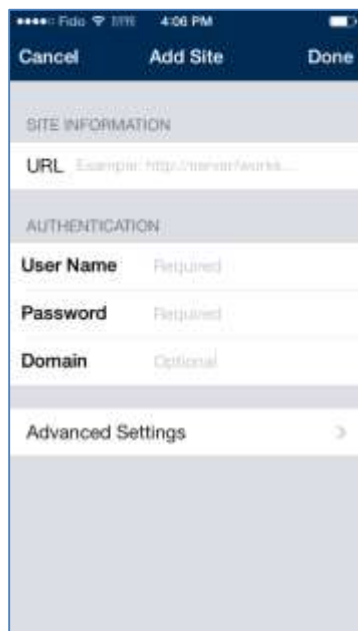
For information about viewing content, see **Viewing Items**.

## Adding a Site

1. Tap the site icon  to display your list of sites:



2. Tap the plus icon .  
The **Add Site** dialog displays:



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*In Colligo Briefcase Lite, you can only add one site. Colligo Briefcase Pro and Enterprise allow you to add an unlimited number of sites.*

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3. In **URL** field, enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address. This field validates the URL you enter, so you cannot enter an incomplete or unqualified URL.

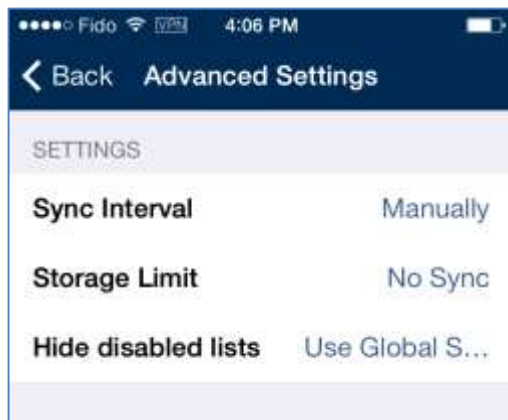
**NOTE:** the format of the URL must match the SharePoint server URL.

If you require a fully qualified URL, you may need to define alternate access mappings for it.

4. In the **Authentication** section, enter your **User Name**, **Password**, and **Domain** for the site.

**NOTE:** the Domain field displays only if needed.

5. Tap **Advanced Settings** to configure the following options:



- a. Tap the **Sync Interval** field and choose one of the following options to determine the frequency of the sync interval:
  - i. Manually
  - ii. Every Open
  - iii. 15 min
  - iv. 30 min
  - v. Hourly
  - vi. Daily
- b. Tap the **Storage Limit** field and choose one of the following options:
  - i. No Sync, Browse Only
  - ii. 10 MB
  - iii. 20 MB
  - iv. 50 MB
  - v. 100 MB
  - vi. 200 MB
  - vii. 500 MB
  - viii. 1 GB
  - ix. 2 GB
  - x. 8 GB
  - xi. 16 GB
  - xii. Unlimited

**NOTE:** this setting is different from the **Global Sync Limit** that applies to the entire application (see **Managing Application Settings**). The **Global Sync Limit** setting overrides any individual site storage limits.

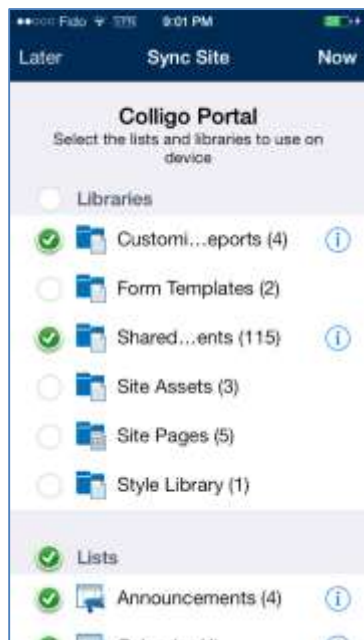
- c. Tap **Hide disabled lists** and choose one of the following options:
  - i. If you choose **Use Global Setting**, the setting you have chosen for this item in the **Colligo Briefcase Settings** screen applies to this site; see **Managing Application Settings**.
  - ii. If you choose **Yes**, you are hiding the disabled lists for this specific site.
  - iii. If you choose **No**, you are displaying the disabled lists for this specific site.

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*In Colligo Briefcase Lite, you cannot set the Storage Limit to more than 50 MB. Colligo Briefcase Pro and Enterprise allow unlimited storage.*

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6. Tap **Back** to return to the **Add Site** screen.
  7. Tap **Done**.
- The site syncs and then displays the **Sync Site** dialog:




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*In Colligo Briefcase Lite, you cannot choose which lists and libraries you want to sync. Colligo Briefcase Pro and Enterprise allow you to specify which lists and libraries are synced.*

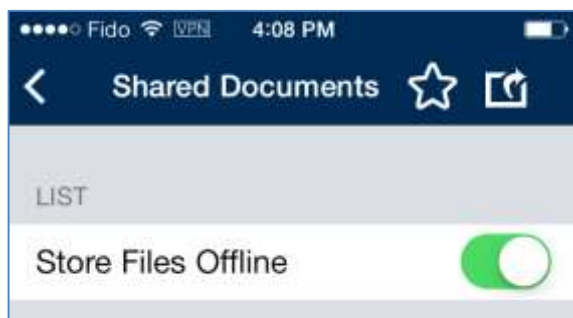
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8. Tap to select or deselect a list or library that you want to sync. Tap the checkmark at the top of each list to select all or deselect all.

The following lists are disabled by default and need to be enabled manually:

- a. Form Templates
- b. Site Assets
- c. Site Pages
- d. Style Library

9. Tap the ⓘ icon beside a selected list or library to display the following screen:

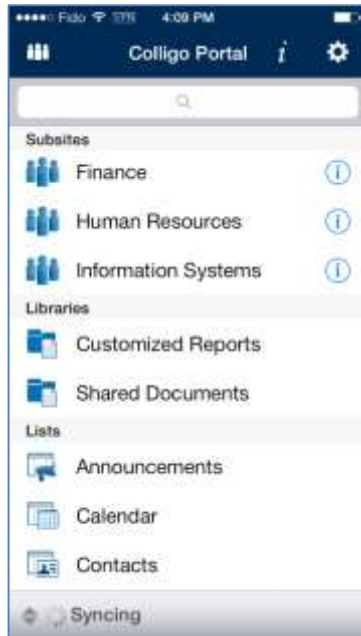


10. In the List section, tap **On** or **Off** to **Store Files Offline**.
11. Tap **Sync Site** to return to the previous screen.
12. Choose **Later** or **Now** to choose when you want to sync the site. If you choose the **Later** option, you can revisit this dialog and set different sync options.

## Syncing a Site

Depending on your Sync Interval setting, you may need to sync the site to retrieve all the information for the lists and libraries. Until a site is synced, no information or data is available for display.

To sync a site, pull the screen down and release:



To see the progress of the sync, pull the Syncing arrow up to display the details:





If this is the first time a site has been synced, all information is downloaded. Colligo Briefcase downloads all data until it reaches the limit you set in the **Storage Limit** option. On the next sync interval, the least recently accessed files are deleted and newer data is downloaded.


The storage limit settings do not include metadata. All metadata for all items is downloaded on the initial sync, but this does not count toward the Storage Limit.

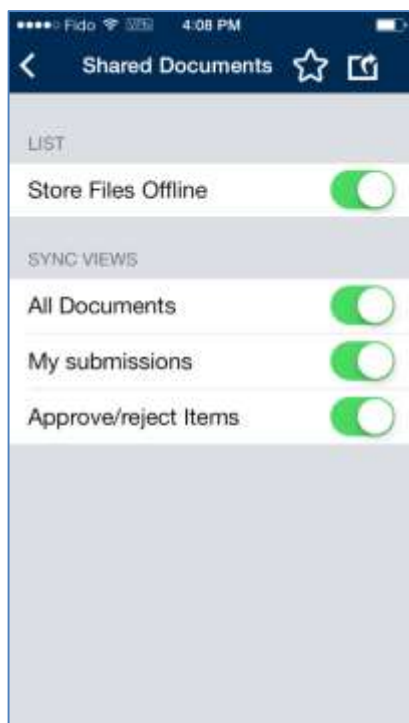
If you are viewing content offline, you cannot view documents that were not synced.

## Editing a Site

To access and edit the information for a SharePoint site:

1. Tap the sites icon  to display your list of sites.
2. Tap the blue icon  beside the site you want to edit:  
The **Edit Site** dialog displays.  
See **Adding a Site** for a description of the fields.

**NOTE:** after you have synced a site, if you go into the **Advanced Settings** screen and tap the  icon beside a selected list or library, the settings allow you to choose which views you want to sync:



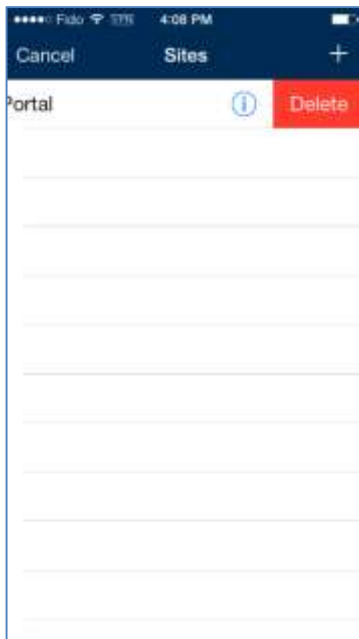


## Deleting a Site

To delete a site:


1. Tap the drop-down arrow to display your list of sites.
2. Swipe the name of the site you want to delete from left to right.

The **Delete** button displays:



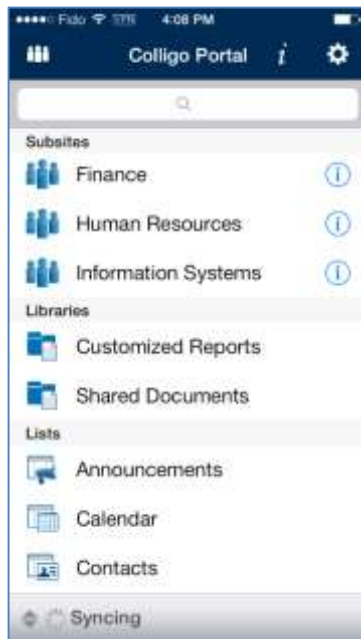
3. Tap the **Delete** button to remove the site from your list.  
**NOTE:** sites are deleted at the root level, so all subsites are also deleted.
4. Tap **OK** to continue with the removal, or **Cancel** to retain the site.

## Displaying a Site

To display a SharePoint site you have added, tap the sites icon  and tap the site you want to view. The libraries and lists associated with the site display.

## Viewing Items

1. After you add a SharePoint site, the subsites, libraries, and lists in that site display. The bracketed number beside each library or list indicates the number of items in that location.



2. To display a subsite, tap the name in the **SubSites** list.
3. The libraries and lists for that subsite display and you can choose which ones you want to be synced.
4. Tap on any library or list and the items contained in the library or list display in a new screen:



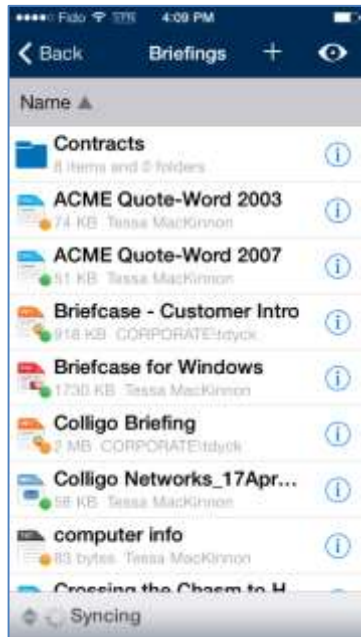
**NOTE:** If the item has a green circle icon, it means the item is synced and is viewable.

If the item has an orange circle icon, it means the item has not yet been synced and is not yet viewable.

If the item has a grey circle icon, it means the item is not going to be synced for one of the following reasons:

- Global storage limit is set to No Sync
- Site storage limit is set to No Sync
- List set to not store files offline
- File set to not be stored offline

5. If there are folders, you can tap the folder to display any subfolders or the items in the folder.



The subfolder name displays at the top of the screen. You can tap the button to return to the previous folder level.

To view the contents of an item, tap the file name in the list. The document displays on a new screen:




## Applying Views and Filters to Lists or Libraries

You can change the view of your content by applying a view that is configured in SharePoint, or you can filter the content by one or more metadata fields in your local view.

### Applying Views

To filter your view of the items contained in a list or library:

1. Tap the  icon in the top right corner of the screen.

A list of available views displays on a new screen:



2. Choose your preferred option from the list of available choices.  
**NOTE:** the views available for the list or library are set in SharePoint.


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*In Colligo Briefcase Lite, you cannot apply views to your content.*

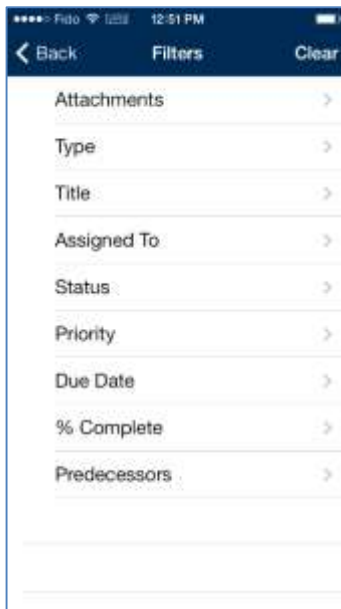
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## Applying Filters

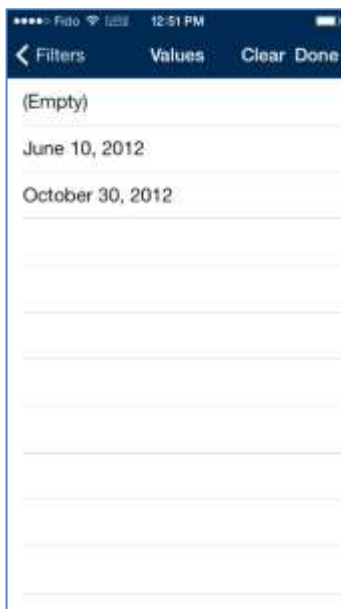
To apply a metadata filter to your content:

1. Tap the  icon in the top right corner of the screen.
2. In the **Options** section, tap **Filters**.

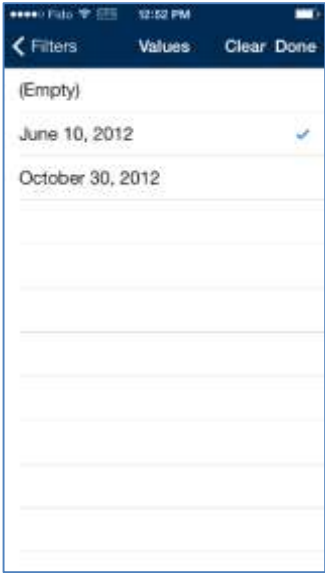
A list of metadata fields that are attached to the list or library displays on a new screen:



3. Select the metadata type to display the filter options:

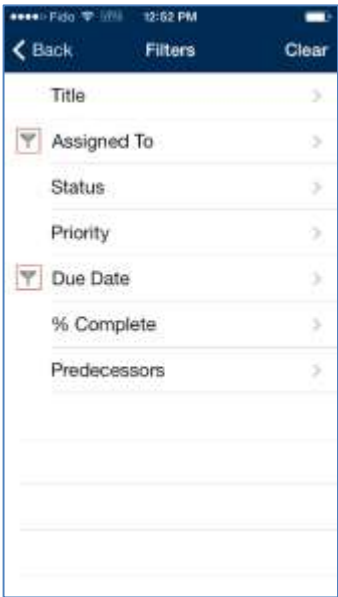


4. Tap a value to select it and apply that filter to your content.
5. Tap a second value if you want to apply multiple metadata filters:



The check mark icon indicates which values are being used as filters.  
To set new filters, tap the **Clear** button.

6. You can also add a second filter; the filter icon indicates which metadata fields are being used:

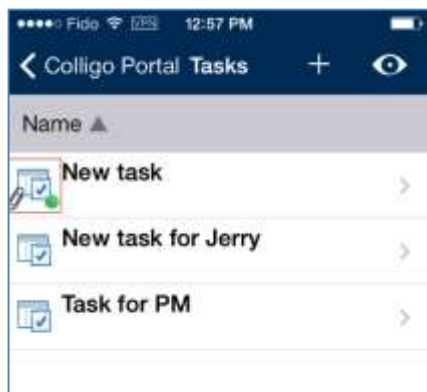


Tap the **Clear** button to clear any filters to the content.

**NOTE:** if you navigate away from the library or list that you have applied filters to, the filters no longer apply to your content.

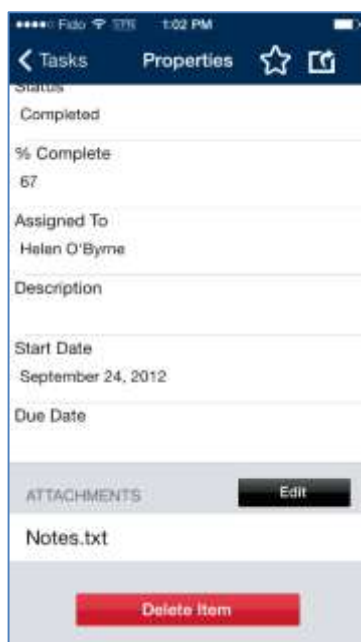
## Viewing Attachments in Lists

If a list item contains an attachment, a paperclip icon displays in the list view:



The attachment is accessible from the metadata screen. Tap the icon at the end of the row to display the item's properties.

The **Properties** screen displays:

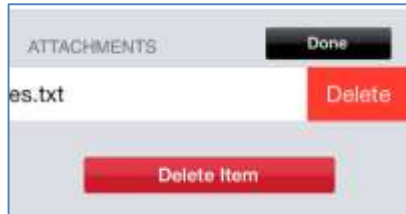


Any attachments display in list form in the **Attachments** section. To view the content of the attachment, tap the file name to display the document in a separate screen.

## Deleting Attachments

To delete an attachment in a List:

1. Tap the **Edit** button.
2. Tap the red circle to display the **Delete** button:



3. Tap **Delete** to delete the attachment or tap done to cancel the deletion.

**NOTE:** you can only delete attachments from List items. Attachments that are filed to Libraries as part of an email (.msg file) cannot be deleted.

---

*In Colligo Briefcase Lite, you cannot delete attachments in list items.*

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## Viewing, Editing, and Creating InfoPath Forms

Colligo Briefcase supports the creating, viewing, and editing of InfoPath forms in both libraries and lists.

**NOTE:** InfoPath Forms are not available for viewing or editing when offline.

*In Colligo Briefcase Lite, InfoPath forms are not supported.*

### Viewing or Editing InfoPath Items

To view and edit the contents of an InfoPath form:

1. Select the item to display the form on a new screen:

2. Edit as needed and tap **Save**.


InfoPath Forms in lists display as all other list item types, showing the item details in list form:

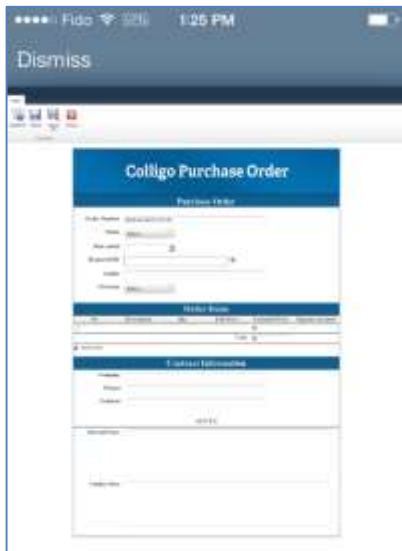
You can edit the fields by tapping the **Edit** button. For more information about editing InfoPath form properties, see **Viewing and Editing Item Properties**.

## Creating New InfoPath Form Items

If you try to add a new form to a library when you are offline, an error message displays. However, if you try to add a new form to a list when you are offline, you are able to fill out the item metadata, which will be uploaded when you are online again.


To create a new InfoPath form item:

1. Tap the  icon in the InfoPath form list or library.  
For Lists, select **List Item** from the available actions.  
The InfoPath form displays on a new page:





2. Edit as needed and tap **Save**.

## Viewing and Editing Item Properties

To view and edit the details of an item in a List or Library, tap the blue icon  beside the item file name. The item's details display in a separate screen:



Tap the star icon  to add the item to your Favorites list.

Tap the action icon  to display contextual options for the item. The options are dependent on the file type and the configuration of your iPod/iPhone.

### Viewing Item Details

In the **Document** section, you can see the file type, name, and size. In the **Last Update** section, you can view the name of the person who last edited the item, and the date it was last modified.

### Syncing an Item

In the **Document** section, you can enable syncing for the item and any attachments by choosing **ON** or **OFF**. If you choose **OFF**, the item is no longer viewable offline.

### Checking an Item Out/In

To check an item out, tap the **Check Out** button in the **Document** section. The Check Out icon is overlaid on the item in the SharePoint site so other users know you are editing it. If you have checked an item out, the option to **Check In** displays. However, you can't check a document in if you didn't check it out.

**NOTE:** you cannot check out items in Lists. The Check Out option displays only for items in Libraries.

---

*In Colligo Briefcase Lite, you cannot check items out.*

---

## Deleting an Item

To delete an item, tap the **Delete Item** button. A confirmation dialog displays, asking for confirmation of the deletion. If you choose **Yes**, the item is tagged with a **Deleted** icon:



These items are deleted on your next sync.

If you return to the item's **Properties** screen before you have synced the change, you can cancel the deletion by tapping the **Cancel Delete Item** button.

---

*In Colligo Briefcase Lite, you cannot delete items.*

---

## Editing Item Properties

In the **Properties** section, you can view the item properties. These properties are defined in SharePoint.

To edit, tap the **Edit** button. The fields become editable:



Edit the fields as needed and tap **Done**. The changes are uploaded to SharePoint during your next sync.

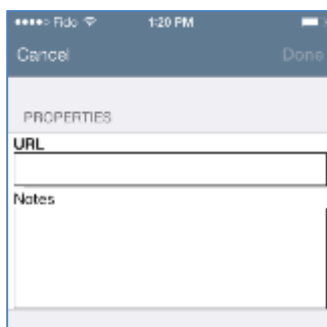
All SharePoint property types are supported in Briefcase and different interfaces display depending on the type of property. The following are some of the editing methods available depending on the type of property:

- If the field is text based, the keyboard displays
- If the field is Yes/No, tap once to toggle between them

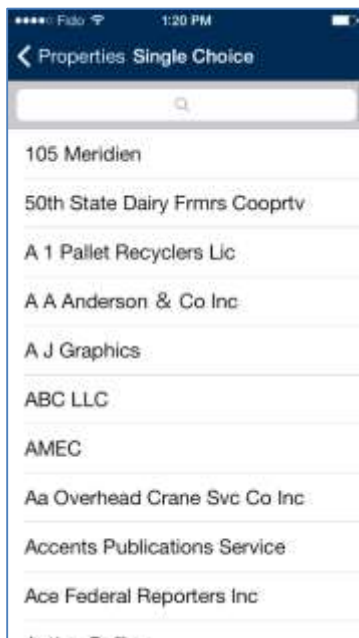
- For date fields, tap once to display the following and scroll to the preferred date:



- For Date and Time fields, tap once to display the following and scroll to the preferred date and time:
- For Hyperlink fields, tap once to display the following fields:




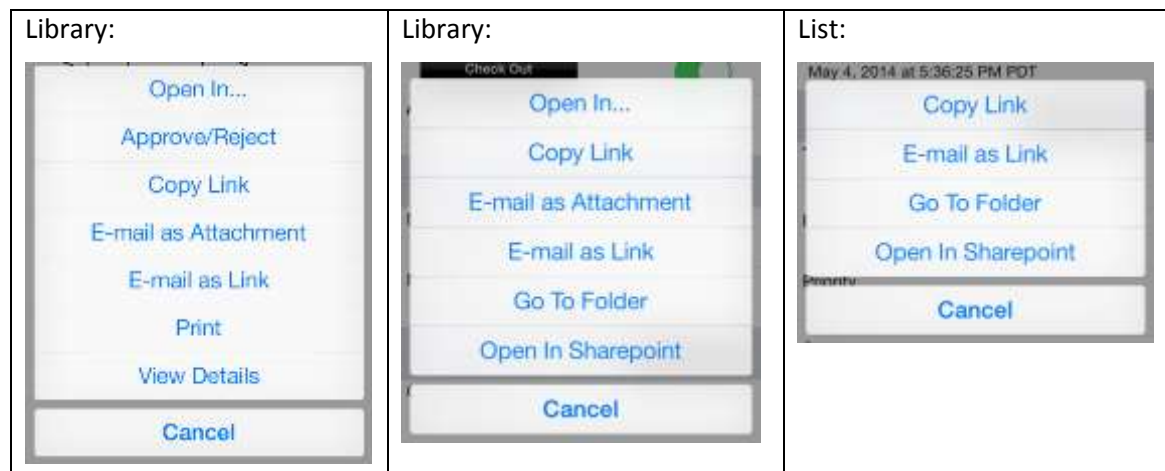
- For Managed Metadata, tap once to display the following list:



*In Colligo Briefcase Lite, you cannot edit item properties.*

## Sharing Items

After you have selected an item and the item content is displayed you can tap the action icon  to display the contextual actions available for items of that type. Not all actions are available for all items. Libraries and Lists have different options:



*If you are using Colligo Briefcase Enterprise, some of the action items may be disabled by Colligo Administrator. These include the Open In... option, the Email as Attachment option, and Print option. This is a security feature available to prevent external sharing of documents.*

## Opening and Editing an Item

Choose the **Open In...** option to display a list of programs that support that file type. You must have programs compatible with the document type for this option to display. Examples of applications you may want to use include Documents to Go, for viewing and editing Microsoft Office documents, and GoodReader for Adobe Acrobat documents.

After you have opened and edited a document, you can upload it back to SharePoint using Briefcase. Please see **Uploading Items to SharePoint** and **Editing Items with** for more information.

*If you are using Colligo Briefcase Enterprise, some of the apps that you choose to open an item in may not function because they are not on the list of approved apps set in Colligo Administrator. Contact your system administrator to have an app added to the list.*

## Copying a Link to the Item

Choose the **Copy Link** option to copy the link to the item's location in SharePoint. You can then paste this link into a document or email as needed.

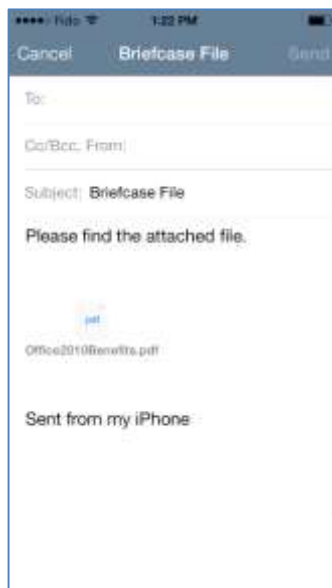
## Emailing the Item as an Attachment

Choose the **Email as Attachment** option to launch a new email with the item embedded as an attachment. You must have an email program present on your iPod/iPhone for this option to display:



## Emailing the Item as a Link

Choose the **Email as Link** option to launch a new email with a link to the item in SharePoint. You must have an email program present on your iPod/iPhone for this option to display.



## Printing the Item

Choose the **Print** option to print the item. This option displays only for PDF and image files, and you must have Air Print enabled on your iPod/iPhone.

## Viewing Details

Choose the **View Details** option to view the item properties. See **Viewing and Editing Item Properties** for more information.

## Go to Folder

For List items, choose the **Go To Folder** option to return to the item's List location.

## Open In SharePoint

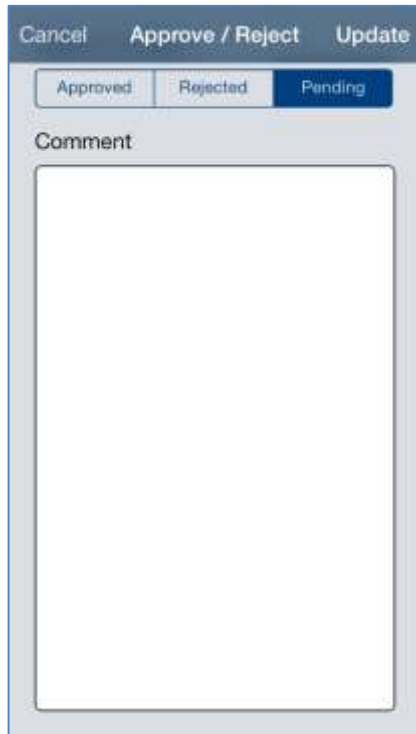
For List items, choose the **Open in SharePoint** option to launch the online view of the list.

## Approving or Rejecting an Item

If the SharePoint library your item is in has an approve/reject field, you can select **Approve/Reject** from the action item menu.

**NOTE:** this option is only available for items that are in a **Pending** state.

The **Approve/Reject** dialog displays:



Enter any comments you might have and tap the appropriate label in the **Approval Status** bar:

- ☐ **Approved**
- ☐ **Rejected**
- ☐ **Pending**

---

*Colligo Briefcase Lite does not support Approve/Reject functionality.*

---



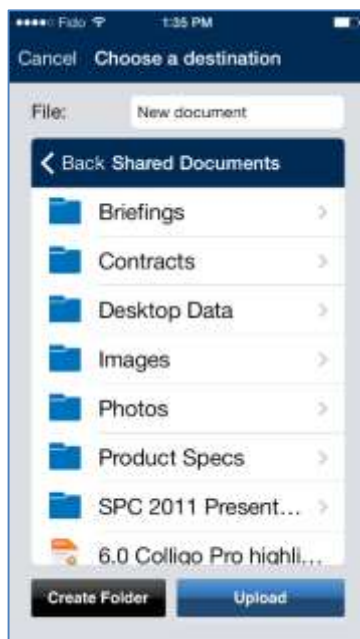
## Uploading Items to SharePoint

To upload an item to SharePoint through Briefcase:

1. Choose Briefcase from the native application's **Open In** menu:



2. Briefcase launches, with the **Choose a destination** dialog displayed:



3. Navigate to the Site, List, or Library you want to file the item to.
4. If you want to create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.
5. If a library has versioning enabled, you can tap **Add New Version**. If you do not want to add a new version of the same document, you need to rename it before uploading it.

6. Tap **Upload**.

The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to:


7. Tap the **Content Type** field and choose the preferred option (if displayed):


The fields that display may change according to the Content Type chosen.

## 8. Enter any information about the item in the appropriate fields.

9. Tap **Done**.

The item is uploaded to the SharePoint location.

If you are offline, the file is uploaded on the next synchronization.

**NOTE:** if your SharePoint site has versioning enabled, you can save the document as a major or minor version to the library.

---

*In Colligo Briefcase Lite, you cannot upload items to SharePoint.*

---

## Uploading a Photo from the Camera

To upload a photo from the iPod/iPhone camera:

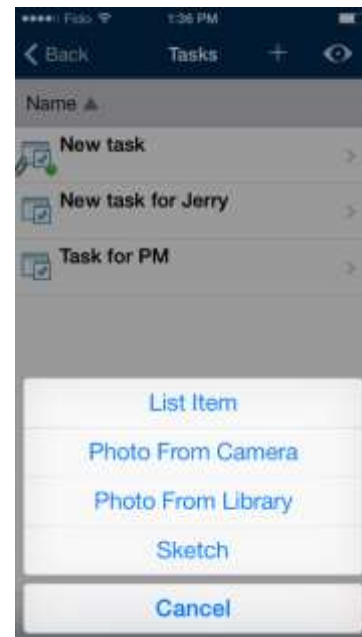
1. Tap the  icon and choose either **Photo From Camera** or **Photo From Library** from the menu.

NOTE: the menu differs depending on whether you are in a list or library:

Action menu for Libraries:

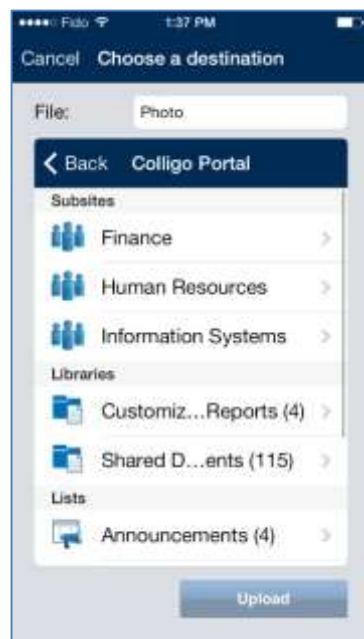


Action menu for Lists:



2. If you choose **Photo From Camera**, the iPod/iPhone camera launches.
3. Take the photo and tap the **Use** button in the bottom right corner.

The **Choose a destination** dialog displays:




4. Navigate to the site list or library where you want to save the photo.

**NOTE:** If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.

5. Tap **Upload** or **Attach**.  
The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
6. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
7. Enter any information about the item in the appropriate fields.
8. Tap **Done**.
9. The photo is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.

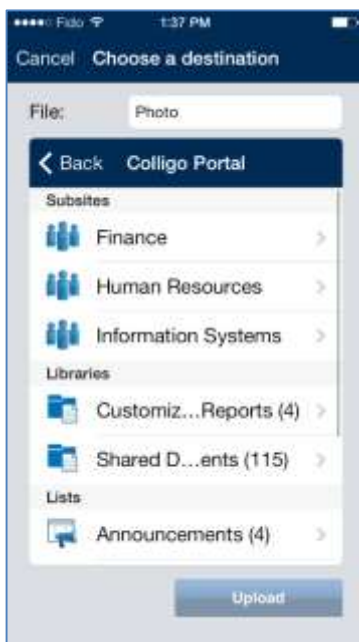
## Uploading a Photo from the Library

To upload a photo from the iPod/iPhone library:

1. Tap the  icon and choose **Photo From Library** from the menu.  
The **Photos** menu displays:




2. Navigate to the preferred image and select it.  
The **Choose a destination** dialog displays:

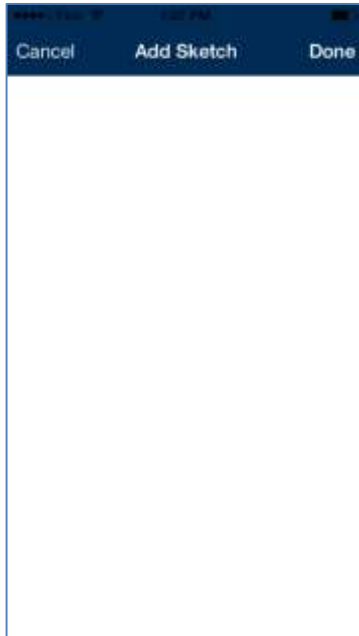


3. Navigate to the site list or library where you want to save the photo.  
**NOTE:** If you are saving a photo to a library, you are uploading it as its own item. If you are saving a photo to a list, you are attaching it to a list item.
4. Tap **Upload** or **Attach**.  
The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
5. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
6. Enter any information about the item in the appropriate fields.
7. Tap **Done**.
8. The photo is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization. The photo is uploaded to the library or attached to the list item and uploaded to SharePoint on the next sync.

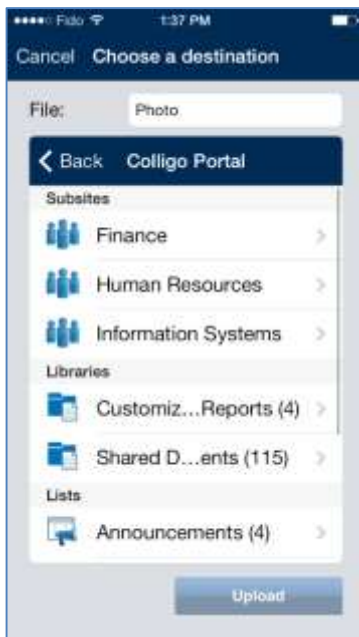
## Uploading a Sketch

To create and upload a sketch to a SharePoint location:

1. Tap the  icon and choose **Sketch** from the menu.  
The **Add Sketch** dialog displays:



2. Complete your sketch.
3. Tap **Done**.  
The **Choose a destination** screen displays:



4. Navigate to the Site, List, or Library you want to file the item to.



5. If you want to create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.
6. Tap **Upload**.
7. The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
8. Enter any information about the item in the appropriate fields.
9. Tap **Done**.  
The item is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization.


**NOTE:** if your SharePoint site has versioning enabled, you can save the document as a major or minor version to the library.

## Viewing, Annotating, and Searching PDFs

Briefcase allows you to view, annotate, and search PDFs.

### Viewing PDFs

You can view PDFs in either single page mode (horizontal scrolling) or continuous mode (vertical scrolling). Use the  icon in the bottom right corner to switch to single page mode and  to switch to continuous mode.


If you want to jump to a specific page in a large PDF without scrolling, use the  icon to display the **Go To Page** pop-up:




Enter the page number you want to view and tap **OK**.

### Annotating PDFs


*This feature is only available in Briefcase Enterprise.*

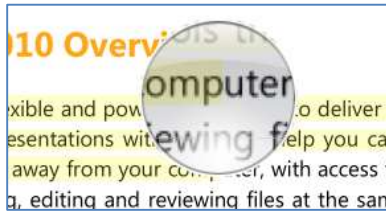
If you want to annotate a PDF, tap the edit  icon on the bottom left corner of the screen. The annotation icons display across the top of the screen.


Tap the draw icon  if you want to use the freehand draw tool to mark up the page. You can also change the color of the line by tapping the circle icon and choosing one of the displayed colors:

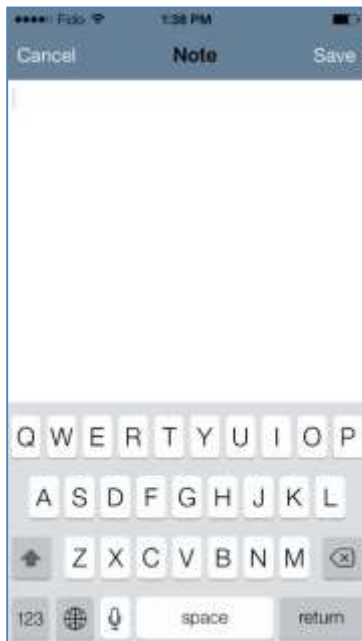






Tap the highlight icon  if you want to highlight a word, sentence, or paragraph. Then select the text you want to highlight by dragging across it with your finger:

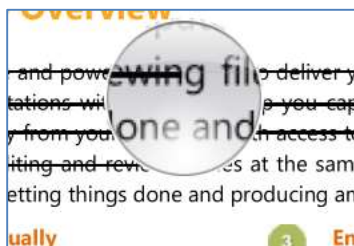


Tap the note icon  if you want to place a sticky note on the page and enter a comment:




Tap the text icon  then tap a location on your document if you want to enter text on the page. You can also change the color of the text by tapping the circle icon and choosing one of the displayed colors.


Tap the strikethrough icon  if you want to cross out a word, sentence, or paragraph. Then select the text you want to strike out by dragging across it with your finger:






Tap the erase icon  if you want to erase an annotation you have made. Then tap and drag across the annotation that you want to erase with your finger.

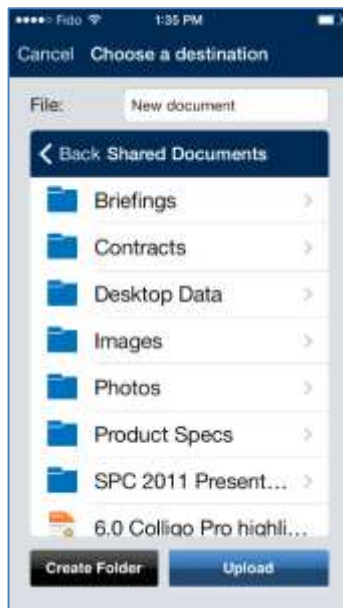


You can use the back arrow icon  to undo any of the annotations you have made at any time.

### Saving an Annotated PDF

To save your annotated PDF:

1. When you have completed your annotations, tap the  icon in the top right corner of the screen. From the drop-down menu, choose your save option.
2. If you choose **Save As**, the **Choose a destination** dialog displays:



3. Navigate to the List or Library you want to file the item to.  
**NOTE:** If you are saving an item to a library, you are uploading it as its own item. If you are saving it to a list, you are attaching it to a list item.
4. To create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.
5. If a library has versioning enabled, you can tap **Add New Version**. If you do not want to add a new version of the same document, you need to rename it before uploading it.
6. Tap **Upload**.  
The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to.
7. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
8. Enter any information about the item in the appropriate fields.
9. Tap **Done**.  
The PDF is uploaded to the SharePoint location. If you are offline, the file is uploaded on the next synchronization.



## Searching PDFs

To search a PDF:

1. Tap the search icon  in the bottom middle of the screen.

A search field displays at the top of the screen:



2. Enter your search term and tap **Search**. Any instances of your search term are highlighted in the PDF.
3. Use the back and forth arrow icons   to move between instances.

Tap anywhere on the PDF to exit search mode.

## Editing Items with QuickEdit

You can edit Microsoft Office documents in QuickEdit and save them directly back to Briefcase.

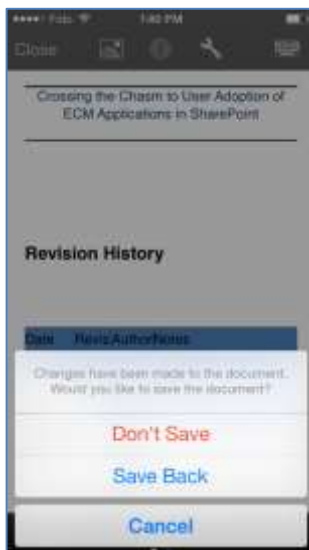
**NOTE:** QuickEdit is a separate app that must be purchased and installed separate from Briefcase.

1. From the action item menu, choose the **Open In** option.
2. Select QuickEdit from the available apps listed:



QuickEdit launches.


3. Use the app to make your edits. When your changes are complete, tap **Close**.
4. Tap **Save Back** to save the changes back to Briefcase:

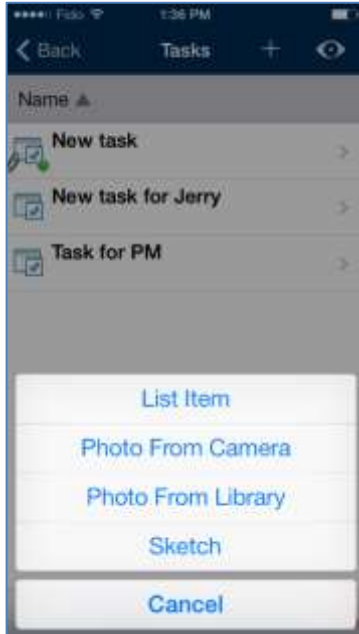


The item is uploaded to Briefcase.

## Creating New List Items

To create a new list item:

1. Select the list you want to add a new item to and tap the  button.
2. Select **List Item** from the menu:



3. A screen launches, displaying the fields related to the list item type you are creating. Fill in the required fields for the task and tap **Done**.  
The task is added to the list and to the SharePoint site during your next sync.

---


*In Colligo Briefcase Lite, you cannot create new List items.*

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## Viewing Calendars

Briefcase supports special views for Calendars, presenting a graphical view of a calendar:



To change the view, tap the folder icon on the top right  and choose your preferred option:



You can also tap a specific day in the **Week** or **Month** view, to display the **Day** view.

## Viewing Contacts

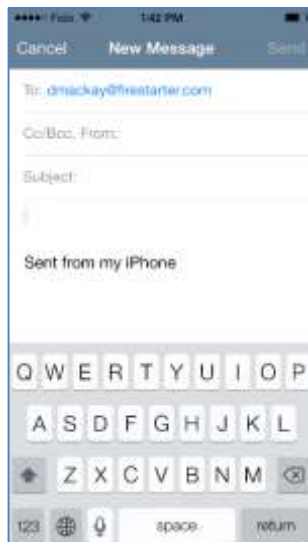
In your contacts list, you can select a contact to see the details:



If you tap a contact's address, the location displays on the iPod/iPhone mapping application.

If you tap a contact's phone number on an iPhone, the device initiates a call to the contact. If you tap a contact's number on an iPod, the device launches FaceTime to connect to the contact.

If you tap a contact's email address, your mail client launches:




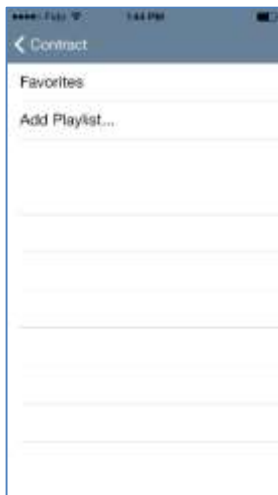
## Managing Playlists

You can add your frequently viewed items and folders to a Playlist for quick and easy access. You can create subject-specific Playlists to group relevant items and folders together. Playlists are not site specific; the items and folders can be from any of the sites you have downloaded.

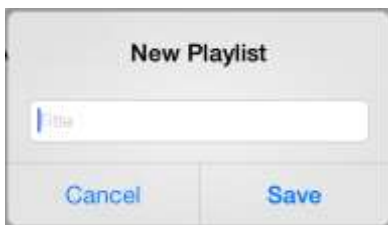
### Adding an Item to a Playlist

To add items you view frequently to a Playlist:

1. Tap the item you want to add to a list.  
A preview of the item displays.
2. Tap the Playlist icon  in the top right corner of the screen.  
The Playlist screen displays:

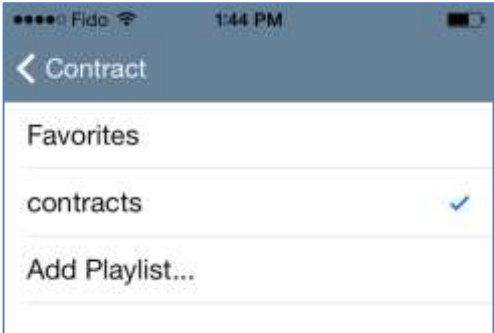


3. From the menu, choose to add the item to an existing Playlist or choose **Add Playlist** to create a new one.
4. If you choose **Add Playlist**, the following dialog displays:

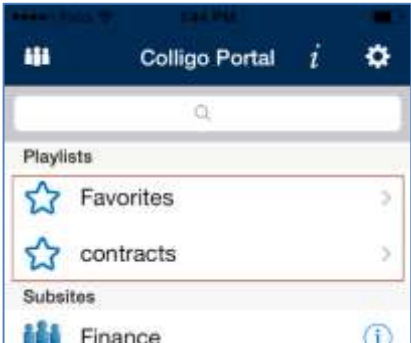


5. Enter the name of the new Playlist.
6. Tap **Save**.  
The new Playlist now displays as an option to add the item to:





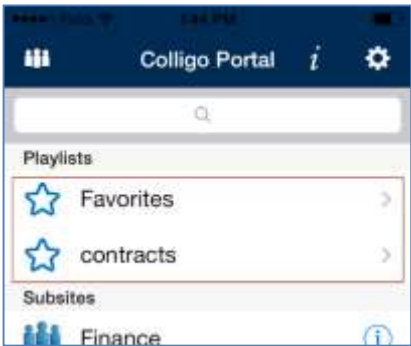
7. All lists display under the **Playlists** section on the home screen:



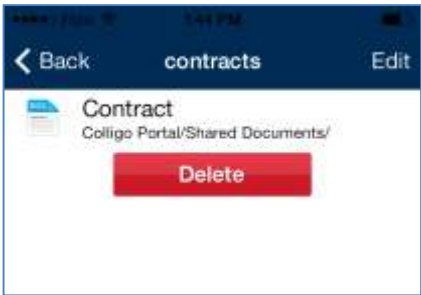
**NOTE:** For information about adding a folder to a Playlist, see Error! Reference source not found..

### Viewing Playlist Items

To view items in a Playlist, tap one of the lists in the **Playlists** section on the home screen:



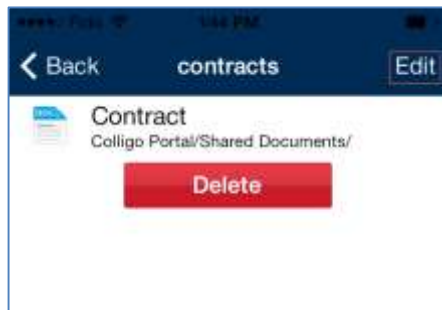
A list of your items displays:



## Editing and Deleting Playlist Items

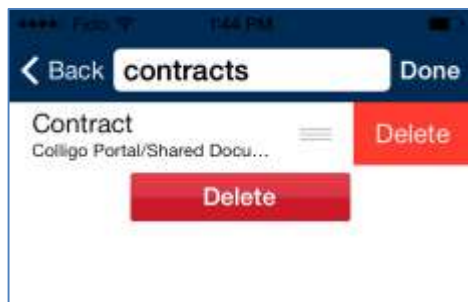
To edit or delete items in a Playlist:

1. Tap the **Edit** button.




The list displays with a red icon beside each item.

2. Tap the red icon beside the item you want to delete.  
The **Delete** button displays beside the item name:



3. Tap the **Delete** button to remove the item from your Playlist.

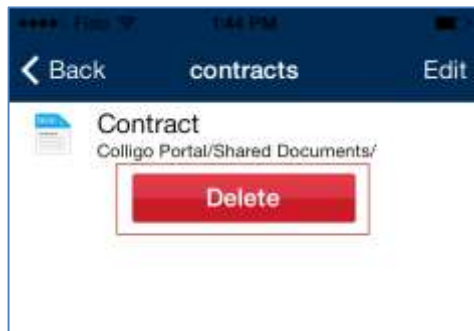
**NOTE:** You can also remove an item or folder from a Playlist by tapping the Playlist icon  in the item or folder display and tapping the name of the Playlist currently selected. You can also use this icon to associate the item with a different Playlist.

4. To reorder items in a Playlist, tap and drag on the lines to the right of the item name and move the item up or down as preferred.

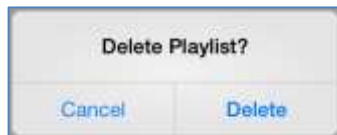
## Deleting a Playlist

To delete a Playlist:

1. Tap the **Delete** button at the bottom of the list:



A confirmation dialog displays:




2. Tap **Delete**.

## Resolving Synchronization Conflicts

There are three potential scenarios for a conflict to occur in Briefcase:

1. **Metadata conflict:** This conflict occurs when there is a difference between an item's metadata on the SharePoint site and the version stored on Briefcase.
2. **Deletion Conflict:** This conflict occurs in two different scenarios:
  - a. When a Briefcase user deletes an item and another user makes changes to the item on SharePoint.
  - b. When a Briefcase user edits an item and another user deletes the item from SharePoint.  
**NOTE:** In this scenario, the Briefcase file must be synced for the conflict resolution process to occur.
3. **File Conflict:** This conflict occurs when two users make changes to the same file at the same time.

Conflicts are detected during synchronization and if any are found, the conflict icon  displays. Tap it to display the list of sync issues and tap the item you want to resolve:

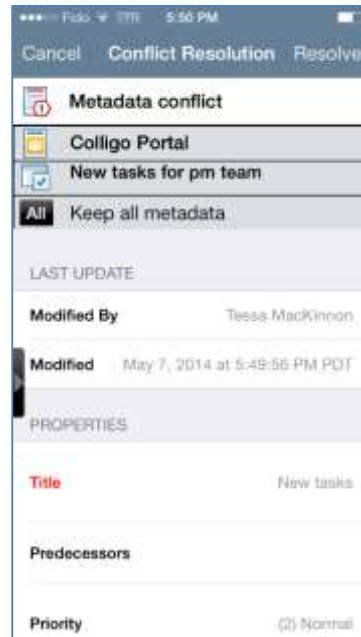


## Metadata Conflict

The **Conflict Resolution** screen displays all conflicted fields marked in red.

To resolve the conflict:

1. The screen shows the metadata fields for the item on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left to see the metadata fields for the same item on the SharePoint site (right side):

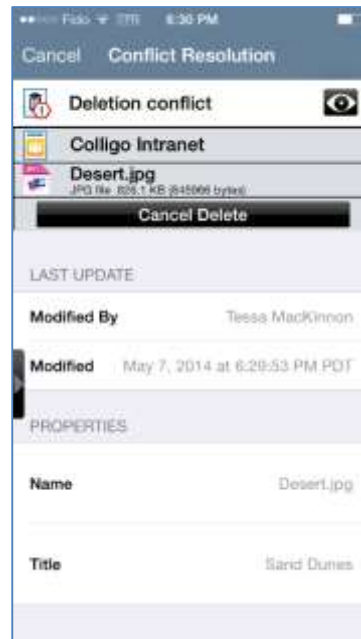



2. Scroll down to see the metadata field(s) in conflict and tap the field that you want to keep. The checkmark icon ☒ indicates which property will be saved:
3. If there are multiple fields in conflict, use the **All** button to select all metadata fields for one version.
4. When you have made your selection, tap the **Resolve** button in the top right of the screen.

## Deletion Conflict

To resolve a deletion conflict:

1. The screen shows the item details on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left to see the details for the same item on the SharePoint site (right side):





2. Use the Preview  button to view the changes that have been made since your last sync.
3. When you have decided if you want to go ahead with the deletion or not, tap either the **Confirm Delete** button or the **Cancel Delete** button.

## File Conflict

To resolve a File conflict:

1. The screen shows the item details on **Your Device** (left side); use the tab on the side of the screen to slide from the screen on the left scroll to see the details for the same item on the SharePoint site (right side):

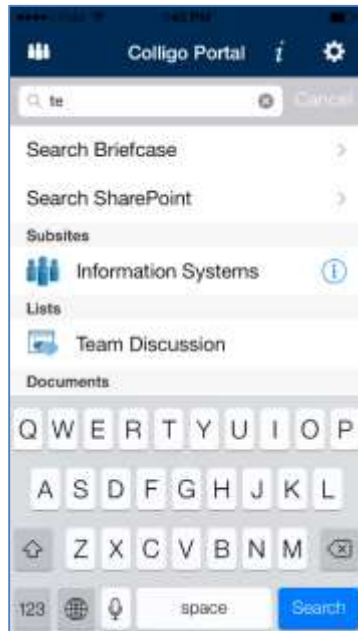


2. Use the Preview  button to view the differences between the file on Briefcase and the file on the server.
3. Tap the button beside **Keep this content** to choose which version you want to keep. The checkmark icon  indicates which file will be saved.
4. Tap **Resolve**.

## Searching SharePoint Lists and Libraries

### Filtering Lists and Libraries

To filter a site's list and libraries, enter one or more characters in the search field. This filters the available content and displays a list of the top 3 items in each list or library that contain the characters you have entered.



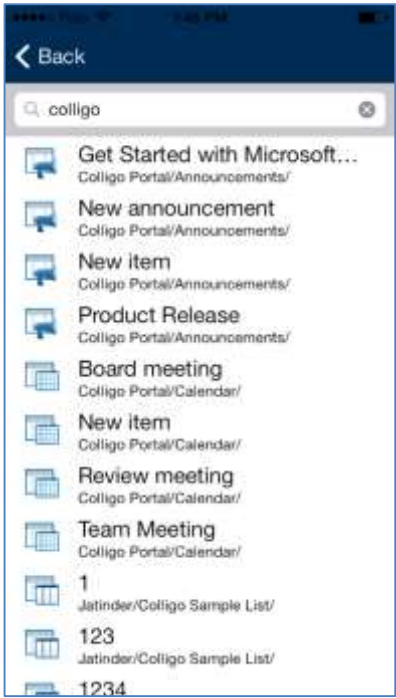
You can select an item in the results to display it on a separate screen.

If the filter does not display the result you are searching for, you can use the **Search Briefcase** or **Search SharePoint** options.



Searching Briefcase

To search, enter your search term and choose **Search Briefcase**. This means you are searching only the content that has been synced to your iPad. The results are sorted by List and Library name. Tap a file to display the content:

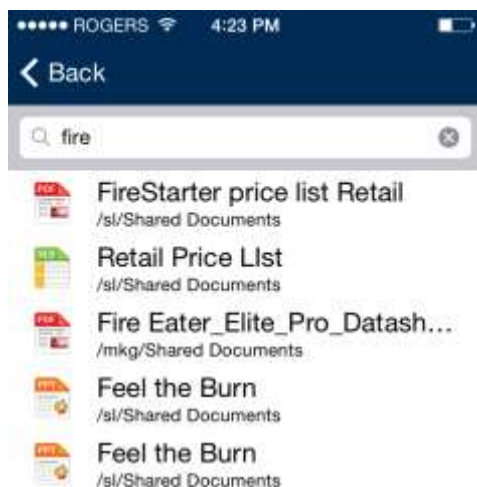


## Searching SharePoint

To search, enter your search term and choose **Search SharePoint**.

This option means you are searching the online SharePoint site. The results display the path of the file location. Tap a file to download and display the content.

**NOTE:** this option is only available online



## Managing Settings

In Colligo Briefcase you can specify settings both at the folder level and at the application level. Site settings are specified when you connect the site initially. For information on editing site settings, see [Editing a Site](#).

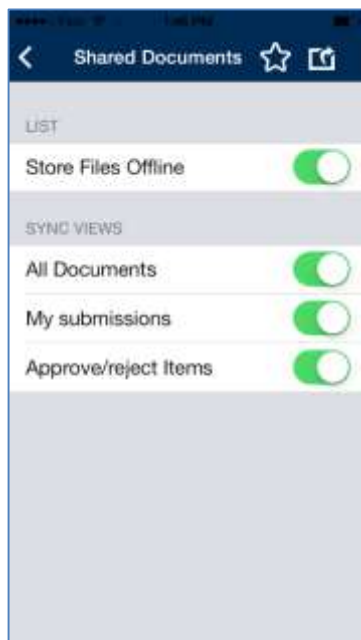
### Managing Folder Settings



You can manage the settings for each folder, provide links to the folder locations, and add folders to your Favorites list.

To manage folder settings:


1. Navigate to the advanced settings for the Folder you want to set tasks for.

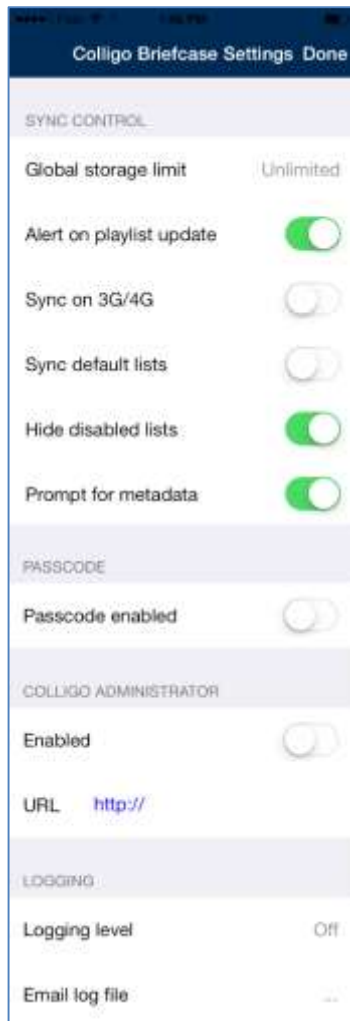
The folder settings dialog displays:



2. In the **List** section, choose if you want to store the files for that folder offline by choosing **ON** or **OFF**.
3. In the **Sync Views** section, select which views you want to synchronize, by choosing **ON** or **OFF**.
4. Click the  icon to add the folder location to your Favorites list.
5. Click the action icon  for access to the **Copy Link** and **Email Link** options.
  - **Copy Link:** tap this button to copy the link to the folder location in SharePoint to paste into a document or email
  - **Email Link:** tap this button to launch a new email with a link to the folder location in SharePoint

## Managing Application Settings

1. Tap the  icon at the top of the screen to display the **Colligo Briefcase Settings** dialog:



2. In the **Sync Control** section, configure the following settings as preferred:
  - a) **Global storage limit:** This setting specifies how much local storage on the iPod/iPhone should be used for syncing SharePoint content offline. You can also select a No Sync mode where no content is stored offline, documents and other items are only downloaded when they are previewed. Choose one of the following options:
    - i. No Sync, Browse Only
    - ii. 10 MB
    - iii. 20 MB
    - iv. 50 MB
    - v. 100 MB
    - vi. 200 MB
    - vii. 500 MB
    - viii. 1 GB
    - ix. 2 GB
    - x. 8 GB
    - xi. 16 GB

## xii. Unlimited

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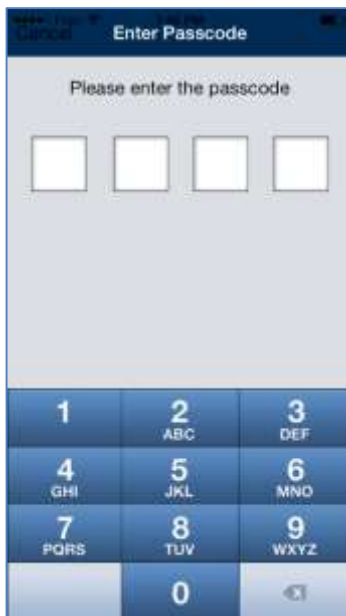
*In Colligo Briefcase Lite, you are limited to 50 MB of storage space to sync content. Colligo Briefcase Pro and Enterprise allow you to sync an unlimited amount of content.*

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- b) **Alert on playlist update:** This setting lets you choose if you want to receive an alert when an item that you have marked as a favorite is updated. Tap to choose **ON** or **OFF**.
- c) **Sync on 3G/4G:** This setting is not supported for Briefcase installations on the iPod/iPhone.
- d) **Sync default lists:** If this setting is on, when you select a subsite that has not been synced, the default content is automatically synced. If this setting is off, you are prompted to manually choose which content you want to sync. Tap to choose **ON** or **OFF**.
- e) **Hide disabled Lists:** If this setting is on, any lists that you have chosen not to sync are not displayed in the left column. If this setting is off, disabled lists are displayed but are greyed out. Tap to choose **ON** or **OFF**.
- f) **Prompt for metadata:** this settings lets you control the Properties screen that displays when you add a new item to a List or Library. Tap to choose **ON** or **OFF**.  
**NOTE:** if the prompt is turned off but there is a required field in the Library or List, the file remains checked out to the user who has uploaded the file and cannot be checked in until these fields are completed.

3. In the **Passcode** section, tap the **Passcode Enabled** field.

The **Enter Passcode** screen displays:

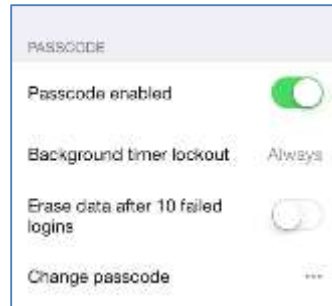



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*The passcode feature is not available in Colligo Briefcase Lite.*

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- a. Enter your passcode.
  - b. Enter the passcode a second time to confirm it.
- Once you have set a passcode, the following options display:



- i. **Passcode enabled:** if you want to disable the passcode you need to enter the existing passcode to do so, unless you have enabled it within the previous minute
  - ii. **Background timer lockout:** tap to choose the length of time that will trigger a lockout
  - iii. **Erase data after 10 failed logins:** tap to choose **ON** or **OFF**
  - iv. **Change passcode:** tap this button to display the **Change Passcode** dialog; enter the existing passcode, then enter the new passcode twice to confirm
4. In the **Colligo Administrator** section, you can enable this feature by tapping to choose **ON** or **OFF**, and enter the **Server URL** of the Administrator site.

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*This feature only applies to Colligo Briefcase Enterprise.*

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5. In the **Logging** section, you can set your logging level as one of the following:
  - a. **Off:** choose this option if you do not want to log your actions
  - b. **Error:** choose this option if you want to log only error messages
  - c. **Brief:** choose this option if you want to log only warnings and error messages
  - d. **Verbose:** choose this option if you want to log all actions, warnings, error messages, and all other information
6. Tap the **Email log file** field to launch an email that includes a screenshot of your current screen, as well as the log.txt file.

## About Colligo Briefcase

Click the information icon at the top of the screen to display the **About Colligo Briefcase** screen:



Tap the **Colligo Website** button to launch [www.Colligo.com](http://www.Colligo.com).

Tap the **Support** button to connect to the Colligo Community site.

Tap the **User Guide** button to launch the Colligo Briefcase User Guide.

Tap the **Privacy Policy** button to view Colligo's privacy policy.

## Appendix I: Supported File Types

Supported File Types	Common Icon Name
folder	folder
txt	Text file
text	Text file
rtf	Rich Text file
pdf	Adobe file
doc	Word file
docx	Word file
xls	Excel file
xlsx	Excel file
ppt	Power Point file
pptx	Power Point file
jpg	JPG file
jpeg	JPG file
gif	GIF file
png	PNG file
tiff	TIFF file
bmp	BMP file
Bmpf	BMPF file
numbers	Numbers file
key	Keynote file
pages	Pages File
msg	Email File
csv	Excel File
aac	Advanced Audio Coding file
mp3	MP3 file (audio)
mp4	MP4 file (video)
m4v	M4V file (video)
3gp	3GP file (video)
mov	Movie file (video)
tiff	TIFF file
tif	TIF file
ico	Icon file
cur	Cursor file
xbm	X BitMap file



Unsupported File Types	Common Icon Name
Zip	Zip File
html	html File
eml	email File
htm	html File
css	css File
one	OneNote File
All others	Unknown File