Briefcase for Android

User Guide

colligo

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Introduction

Welcome to Colligo Briefcase for Android, hereafter referred to as Colligo Briefcase, the app that provides users with a single view into Office 365 and SharePoint.

Colligo Briefcase lets you securely store, sync, and view SharePoint content on your Android devices. Users can access and share SharePoint files, images, 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.

Benefits for end-users:

- Access, upload and share SharePoint documents, images and emails.
- Access content regardless of connectivity, by taking content offline.
- Simplify collaboration, regardless of where content is stored.

Benefits for the enterprise:

- Easily distribute documents to field workers who use Android phones.
- Support BYOD without compromising information management compliance.
- Centrally configure user and sync settings, and push content to user groups.
- Centrally set policies and monitor records management compliance using Colligo Console.

About this Guide

This document provides guidance for the use of Colligo Briefcase. Additional documentation is available on the Colligo support website at https://support.colligo.com.

For any further technical details please contact Colligo Support at https://colligo.com/request.

For sales related question please contact Colligo Sales at https://www.colligo.com/contact-sales/.

Installation and First Launch

Technical Requirements

Please refer to the Release Notes for the latest Technical Requirements.

Installation

Colligo Briefcase is available from the Android Play Store. Search for "Colligo", and **Colligo Briefcase for Android** will be displayed in the results:

For installation, there are two options – you can tap the 3-dot menu on the top right and then choose **Install**, or you can tap anywhere else to open the app description view (Figure 1). From this view, tap on **INSTALL**. During installation, a popup will appear, asking you to give permission to the app. For more details on the access required, tap the down arrow. Once you press the **ACCEPT** button, the app will be downloaded and then installed.

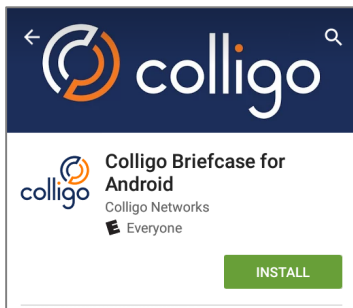*Figure 1 – Play Store Install view*
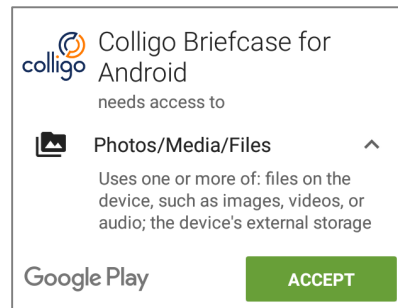
Figure 2 – Briefcase for Android Permissions

First launch

When Colligo Briefcase is launched for the first time, you will see a screen with two options: **Log In**, and **Start Tour**. Completing the tour, or pressing the **Log In** button will take you to the Colligo Engage Authentication prompt.
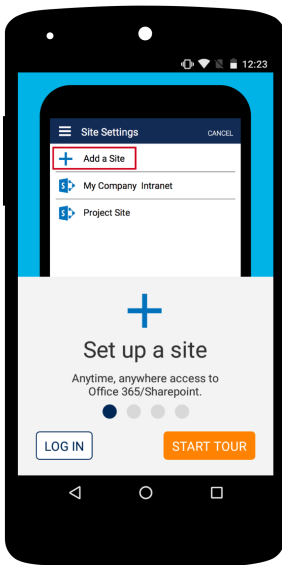
Figure 3 – First Launch
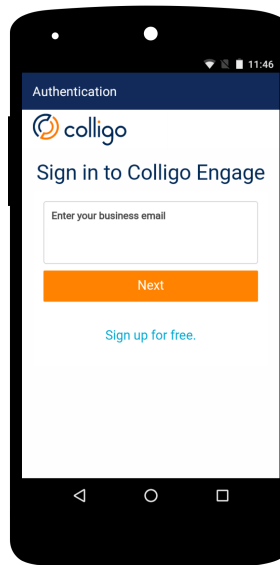
Figure 4 – Sign in Colligo Engage

Colligo Briefcase utilizes the Engage platform to manage user licensing. If you do not have a Colligo Engage account, you can sign up for free. An account is required to use the application.

Subsequent launches of the app, will not be prompt you to Log in or take the tour.

Once you have successfully authenticated with the Engage platform, any Sites or Pinned Locations that were configured in Colligo Console will be pushed down to the app. You will be prompted for your SharePoint credentials for each unique site. The main view of the app will now be displayed. The view below has one site shown. Sites listed here are either pushed from Colligo Console or added from within the app.
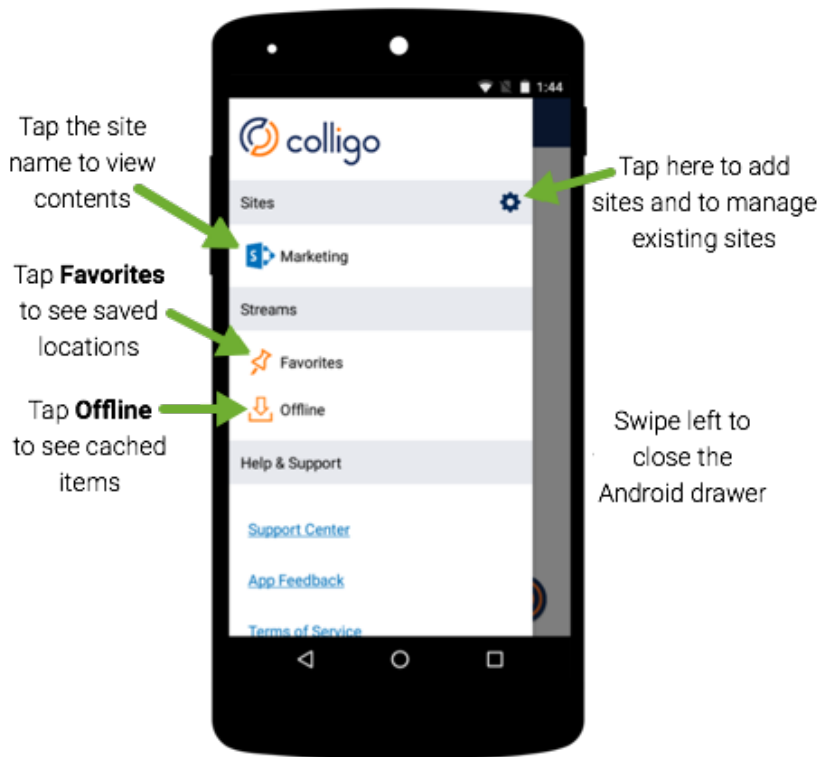
Figure 5 – Briefcase for Android main view

Managing SharePoint sites

Adding a SharePoint site

To add a SharePoint site, launch the **Site Settings** view by tapping the cog in the Sites banner (main view).
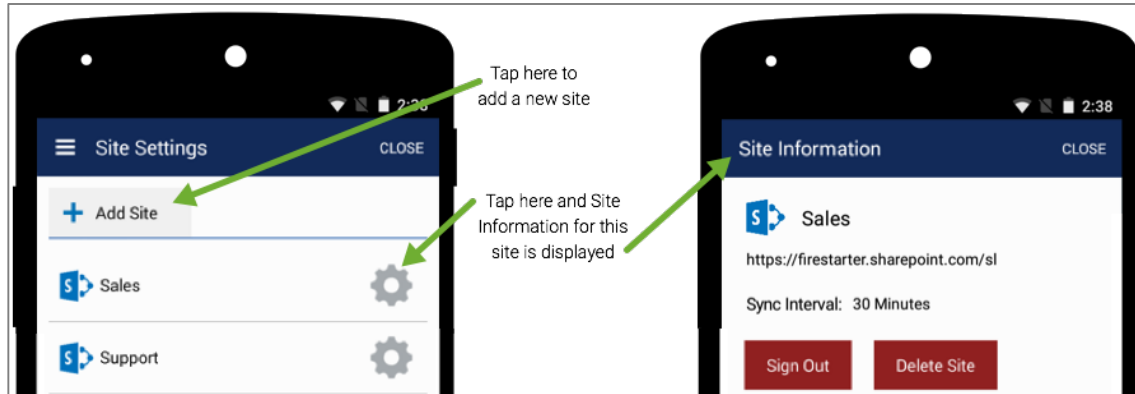
Figure 6 – Site Settings and Site Information

To add a site, tap **Add Site**. You will be prompted for the **Site URL**. Enter the URL and tap **OK**. The address will be validated and you may be prompted for your SharePoint credentials. Once the site has been added, you will be returned to the **Site Settings** view. Close this view to be returned to the main view. The site you just added will be listed under **Sites** in the main view.

Viewing SharePoint site information

To view **Site Information** for a site, tap the cog for the entry for the site. The **Site Information** view is displayed and shows the following:

- The full URL for the site
- The Sync Interval for the site
    - To change the sync interval, please see the section **Settings and Sync Now**
- The option to **Delete** the site
- The option to **Log Out** of the site

Browsing SharePoint sites

To browse SharePoint, tap the site name and browse as if you were in a browser. Colligo Briefcase displays a white, orange or green file status indicator on each file. At a glance, you can see if a file has been taken offline.
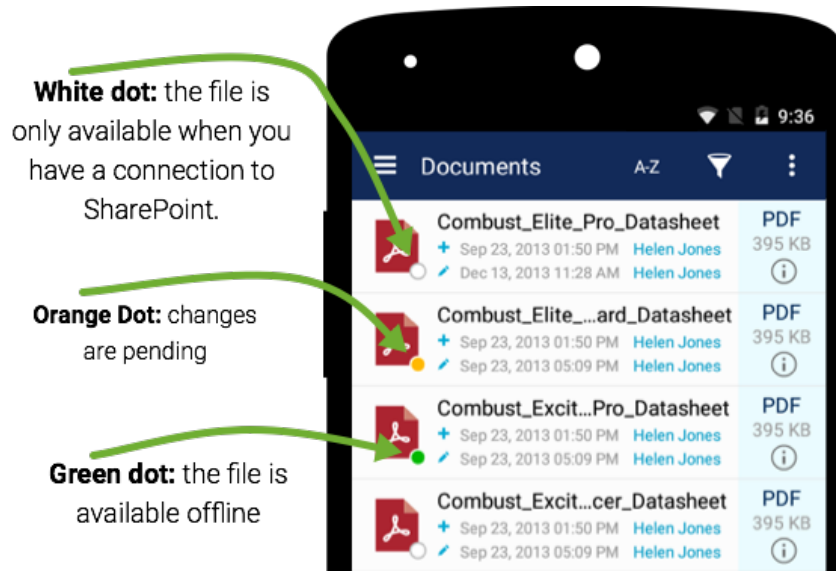
Figure 7 – File status indicators

Sorting options

Files can be sorted by:

- Display Name (ascending or descending)

- File Type (ascending or descending)

- Modified date (oldest first or newest first)

The Default sort is by Display Name ascending. To change the sort options, tap on the **A-Z** icon to display the sort options. Tap on **Sort by Display Name** to change what you are sorting on. Tap on the **triangle** to change the direction of the sort.
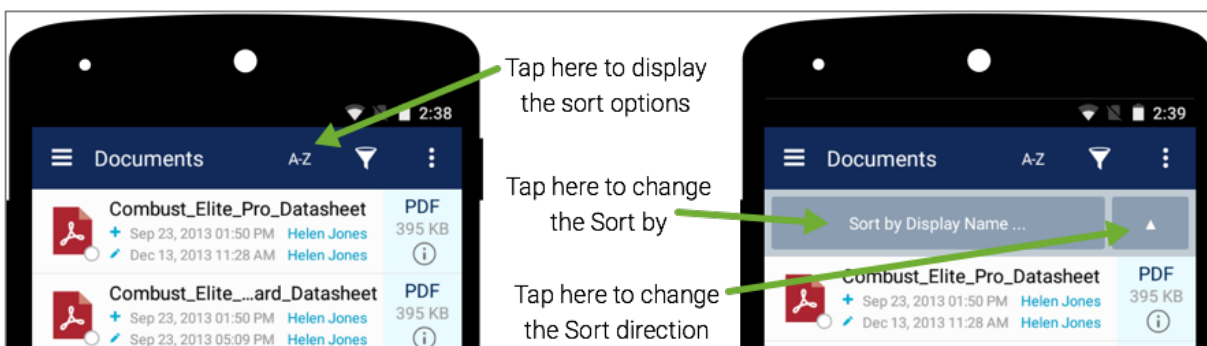
Figure 8 – Sorting options

Search in the current folder for a file by name

You can search for a file in the current folder by clicking on the filtering icon. This will bring up the Search bar. As you enter your search string into the search bar, files that do not contain this string are removed from the view.
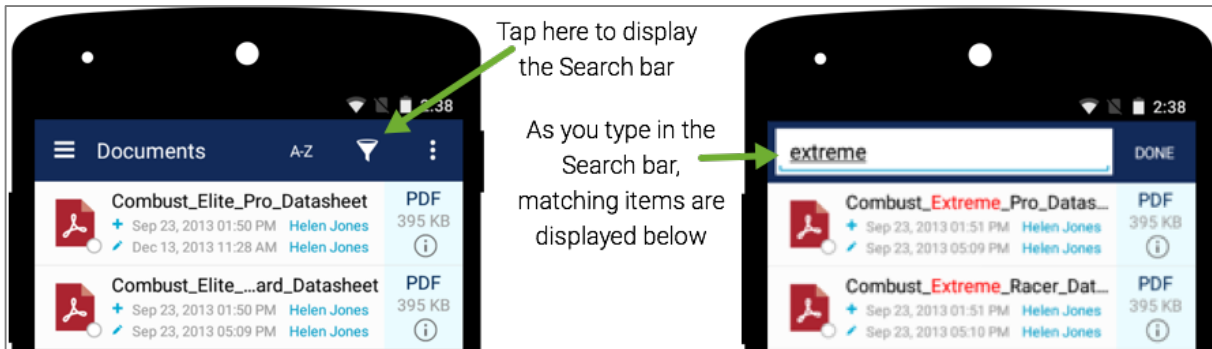
Figure 9 – Search for a specific file by name

Opening a document

To open a document, you need only tap on the document. Locate the document by tapping the Site name and browsing to the location of the document, or by using the filtering function.

Note: Documents will only open If an associated application is installed on your device. If such an app is not installed, you will see the message: There is no application available to open the file.

Figure 10 – Document list

Viewing metadata

To view metadata for a document, first locate the document by tapping the Site name and browsing to the location of the document, or by using the filtering function. Tap on the information area of the document list to bring up the **Properties** (metadata) for the file. Tap **CLOSE** when done.
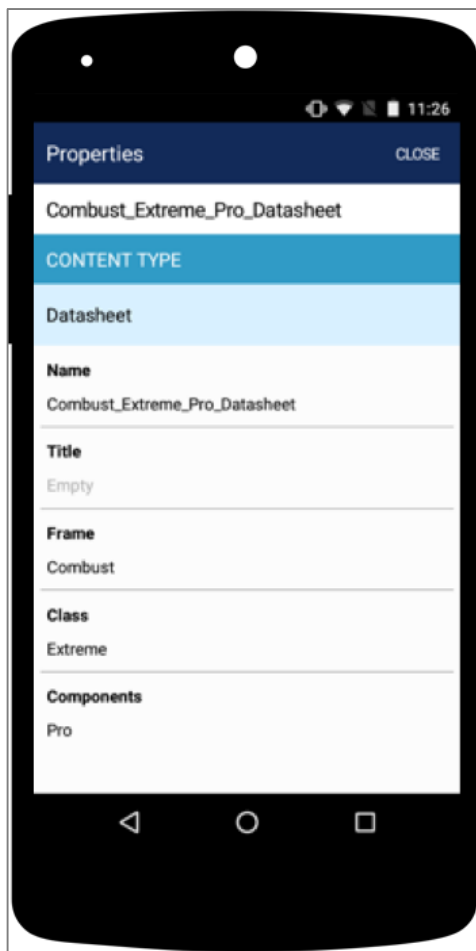
Figure 11 – File Properties (metadata)

Streams

Colligo Briefcase for Android has two streams – **Favorites** and **Offline**.

- **Favorites** – this stream contains documents and locations which the user frequently accesses.
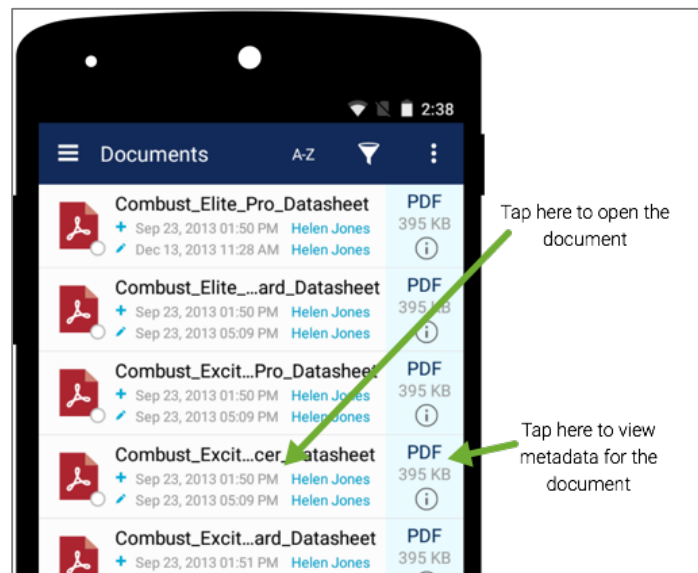- **Offline** – this stream contains documents and locations which the user has taken offline for access when a connection to SharePoint is not available.

The Favorites stream

The Favorites stream allows you quick access to files and folders that you access frequently or wish to be able to access without spending time browsing layers of folders. When you add a Folder to the Favorites stream, all content, including subfolders and their content are available from the Favorites stream.

Adding to the Favorites Stream

To add a file or a folder to the Favorites stream, first browse to the location containing the file or folder to be added. Long press the file or folder to select it and then tap the pin icon to add it to the Favorites stream. A **New Favorite Added** confirmation message displays briefly.

Figure 12 – Adding a Favorite
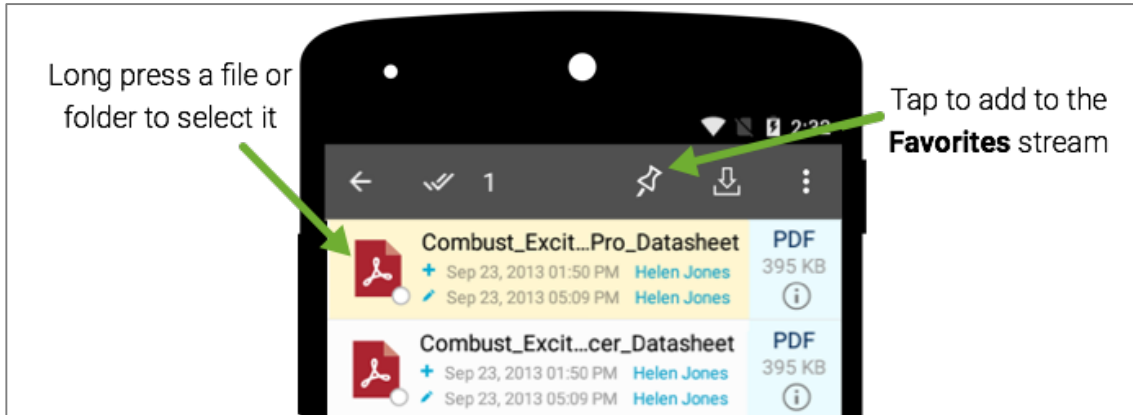
Using the Favorites Stream

To view your Favorites, tap the Favorites stream in the Android drawer.
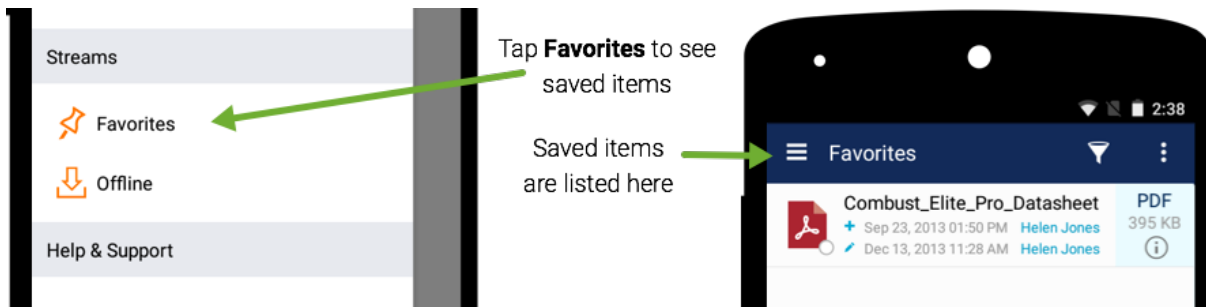

Figure 13 – Using Favorites

Removing items from the Favorites Stream

To remove an item from the Favorites stream, long press the item to select it. Tap the Favorites icon and the item will be removed from the Favorites stream.
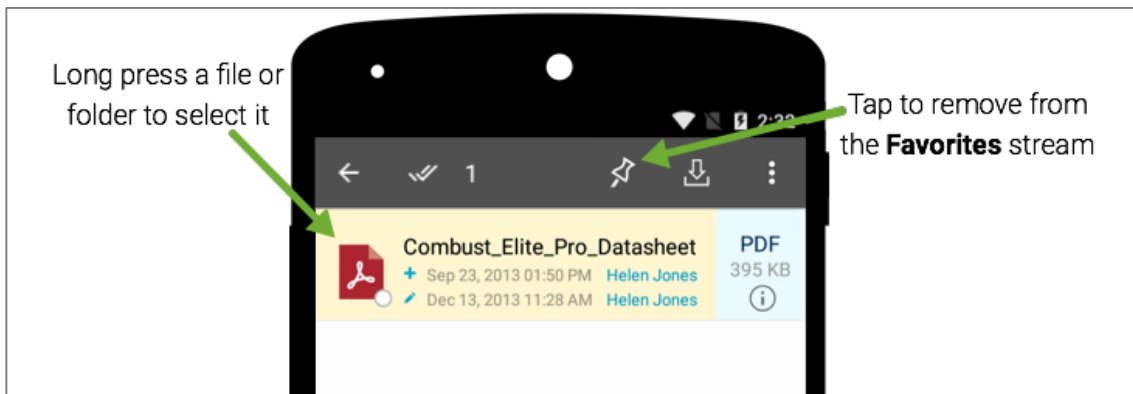

Figure 14 – Removing a Favorite

The Offline stream

The Offline stream allows you to cache files and folders locally so they can be accessed when you do not have connectivity to SharePoint. When you add a Folder to the **Offline** stream, all content, including subfolders and their contents are available from the **Offline** stream.

Files that have been marked as Offline will appear in the **Offline** stream and will have a green dot on the icon both in the **Offline** stream and in the SharePoint location of the app.

Adding to the Offline Stream

To add items to the Offline stream, first browse to the location containing the item(s) to be added. Long press an item to select it. Single tap to select additional items. Tap the offline icon to add the item(s) to the Offline stream. An **Offline Items Added** confirmation message displays briefly.
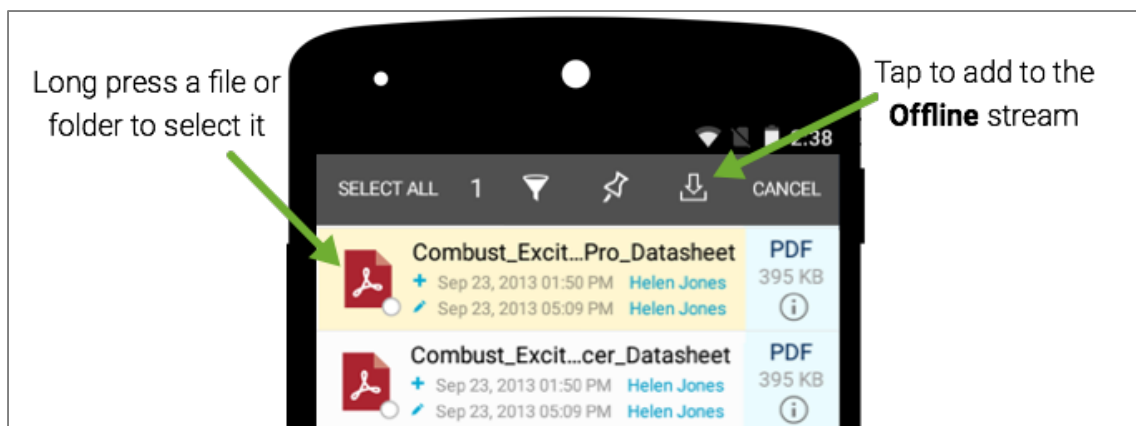

Figure 15 – Adding to the Offline stream

Using the Offline Stream

To view your cached items, tap the Offline stream in the Android drawer.
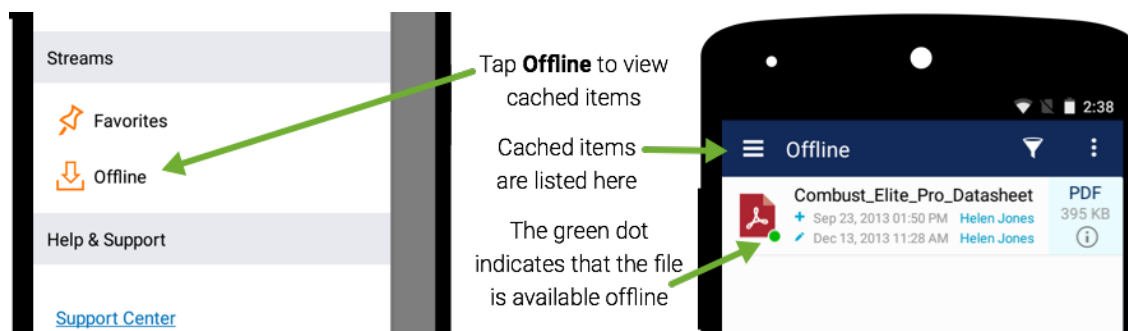
Figure 16 – Using the Offline stream

Removing items from the Offline Stream

To remove an item from the Offline stream, long press the item to select it. Single tap to select additional items Tap the Offline icon and the item will be removed from the Offline stream.
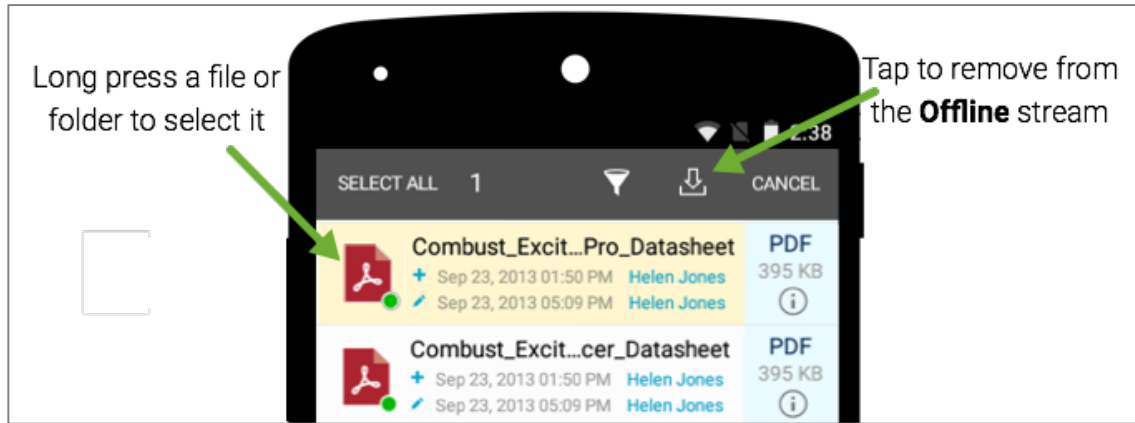
Figure 17 – Removing items from the Offline stream

Sharing SharePoint Content

Sharing files to an external app

This feature allows you to share one or more documents with an external app.

To share items to an external app, first browse to the location containing the item(s). Long press an item to select it. Single tap to select additional items. In the example below, three items have been selected. Tap the 3-dot menu on the top right and choose **Share 3 items**.
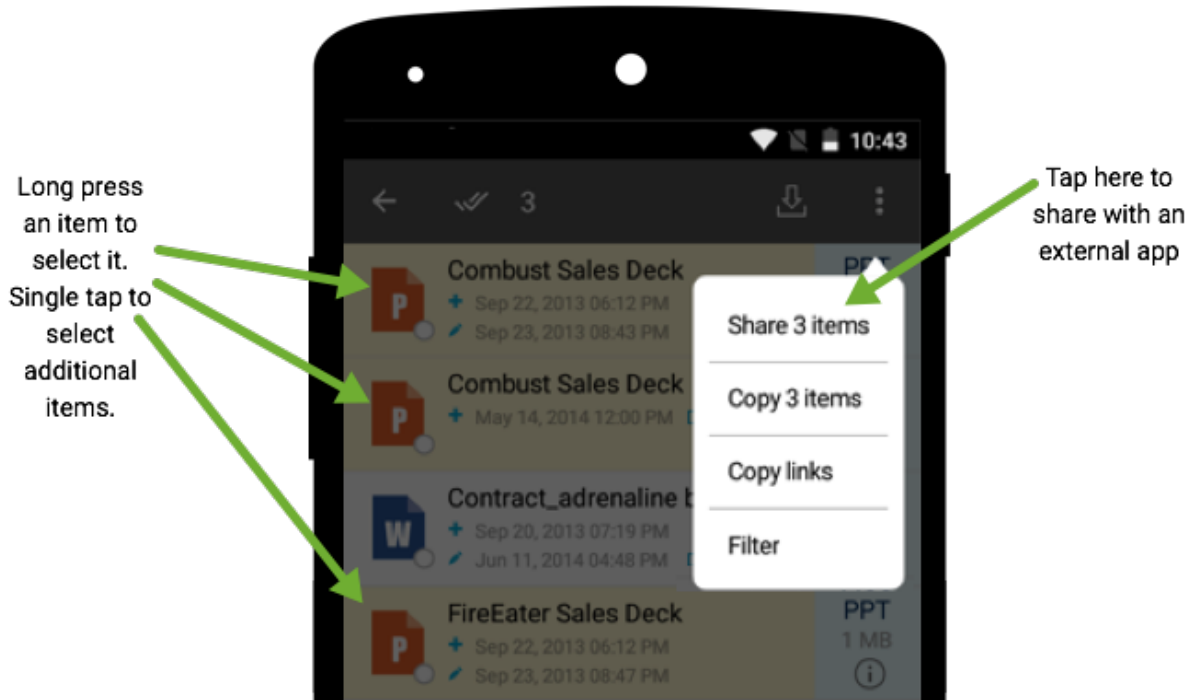
Figure 18 – Sharing files with an external app

A popup will appear to let you know that the items are being prepared. This popup will remain until the files have been prepared. Duration depends on the size of the item(s). Next you'll see the **Share file using…** popup.
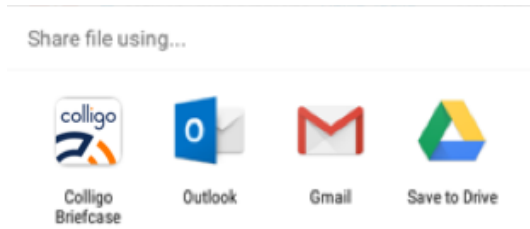
Figure 19 – Choose the external app (Lollipop)
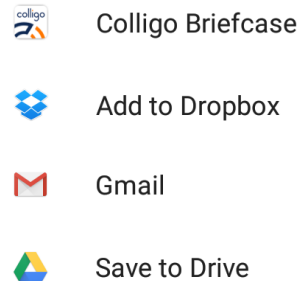
Figure 20 - Choose the external app (KitKat)

Select the desired app and it will be launched. In the example below, Outlook will be chosen. Outlook opens in a new message with the files attached.

Figure 21 – Sharing to an email recipient

Copying files to another SharePoint location

This feature allows you to copy files from one SharePoint location to another.

Note: When copying files in Offline mode:

- Only files which have previously been marked as offline (see   Figure 7) can be copied
- Selecting files which have not been marked as offline will result in a message asking you to **take items offline before copying**.
- Files will be copied to the new location once a connection is reestablished

To copy files to another SharePoint location:

1. Browse to the location containing the item(s)
2. Long press an item to select it. Single tap to select additional items. In the example below, one item has been selected
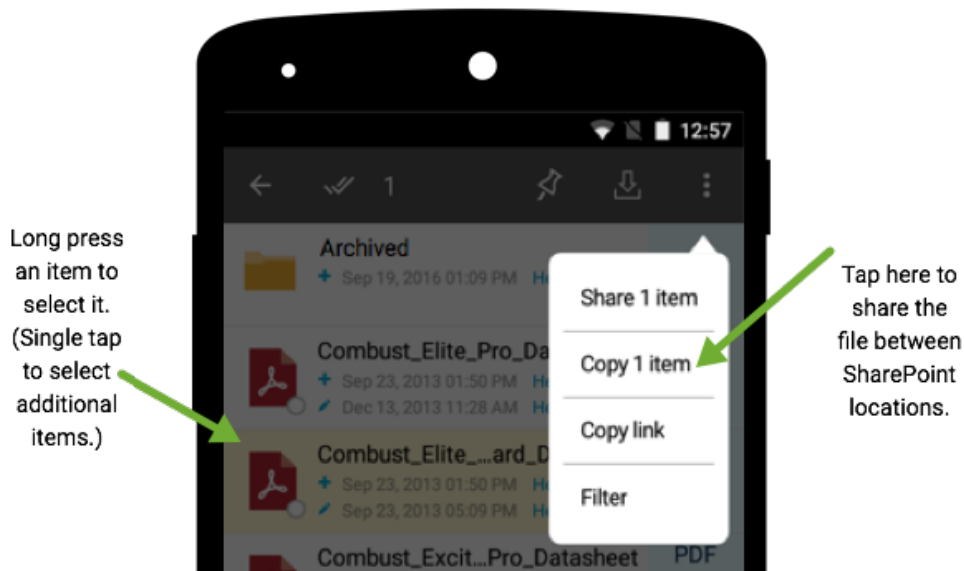
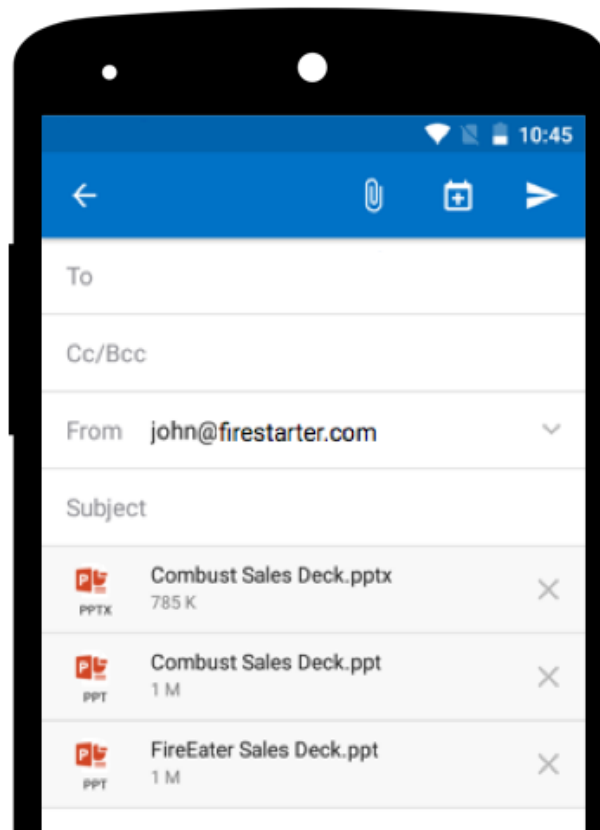*Figure 22 – Copy a file to a SharePoint location*

3. Tap the 3-dot menu on the top right and choose **Copy 1 item**. A popup will appear to let you know that the item is being prepared. This popup will remain until the file has been prepared. Duration depends on the size of the item

4. The **Select Upload Location** page is displayed. Browse to the desired location, then tap **UPLOAD**

5. The **Properties** page for the file is displayed. Enter metadata for the file and then tap **SUMBIT**. To leave the properties unchanged, tap **CANCEL**. If more than one file was selected, you will be presented with a **Properties** page for each additional file

6. The Colligo logo will spin white the file is uploaded. When it stops, the File Upload Complete message is displayed. Tap on **CLOSE**

   Note: If you enter a File Name that already exists in this location, this message will be displayed: Name conflict or invalid name…. Enter a new name and click **OK**

Copying the SharePoint link of a file or folder

This feature allows you to copy SharePoint links and then paste these links into an external app for sharing with other users. Document links and folder links can be copied.

To copy the SharePoint link of an item or items:

1. Browse to the location containing the item(s)

2. Long press an item to select it. Single tap to select additional items. In the example below, two items have been selected
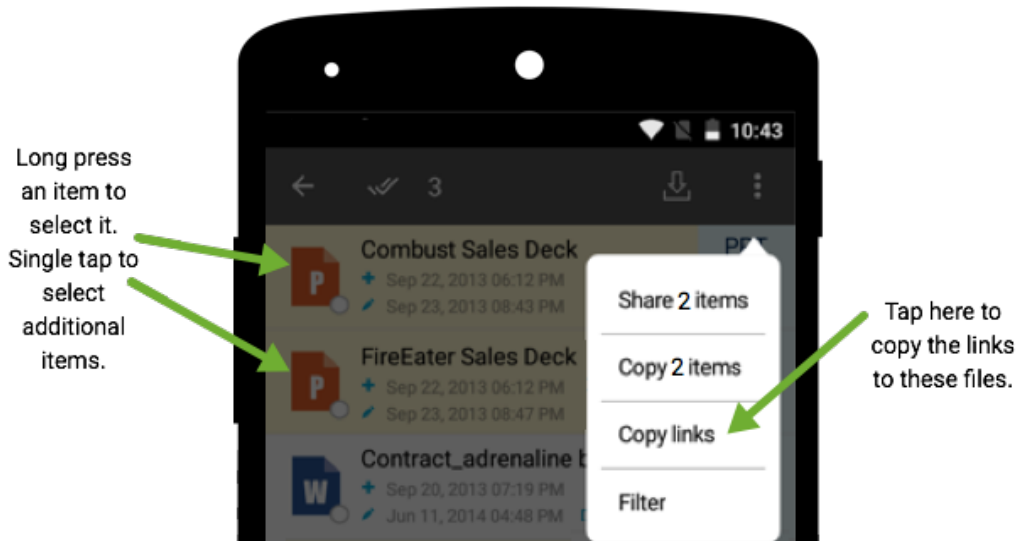

Figure 23 – Copy links to SharePoint files

3. Tap the 3-dot menu on the top right and choose **Copy links**.

4. Open your desired application and you can then paste the links.

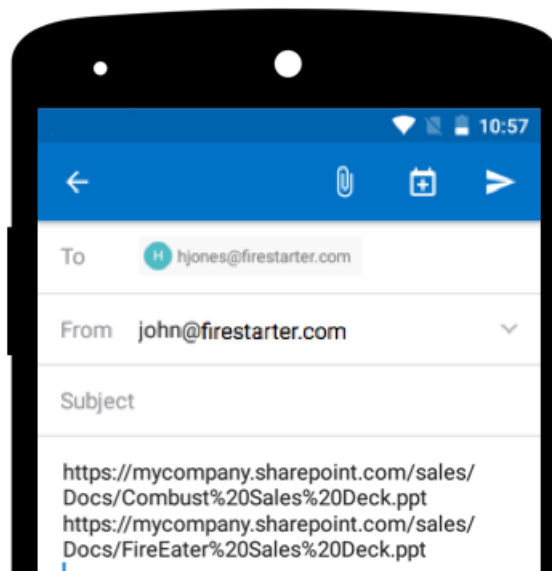5. In the example below, the links have been pasted in to the body of a new email message.

Figure 24 – Links copied to an email

Uploading to SharePoint

Adding a new folder

To add a new folder, first browse to the desired location for the folder. Tap the 3-dot menu on the top right and choose **Create New Folder**. Enter the **Folder Name** and tap **OK**. The folder now appears in the desired location.

Figure 25 – Adding a folder

Note: If you enter a Folder Name that already exists, a naming conflict will occur. The section Naming Conflicts discusses how to resolve such a conflict.

Adding a file

To add a file:

1. Browse to the desired location for the file and then tap the 3-dot menu on the top right and choose **Add File**.

Figure 26 – Adding a file

2. You will be prompted to select a file from your Android device. If the file you wish to add is not in this app, tap the hamburger menu on the top left to display the **Open from** list of apps to choose from.
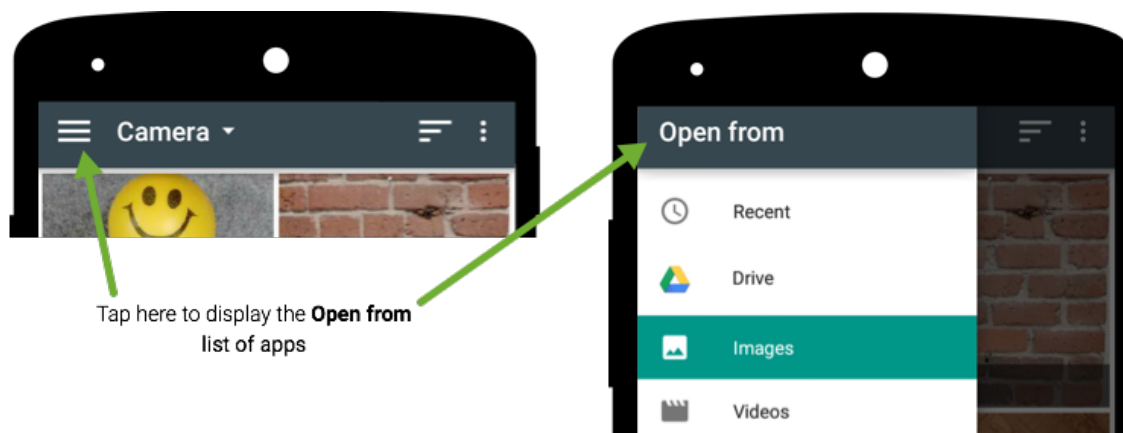
Figure 27 – Locating the file to add

3. Select the app containing the file you wish to upload and then browse to the file you wish to add and then tap the file to select it. The **New File** popup appears.

4. If desired, rename the file.
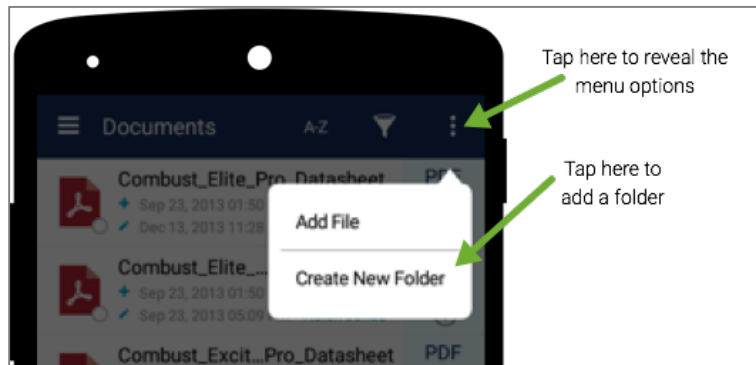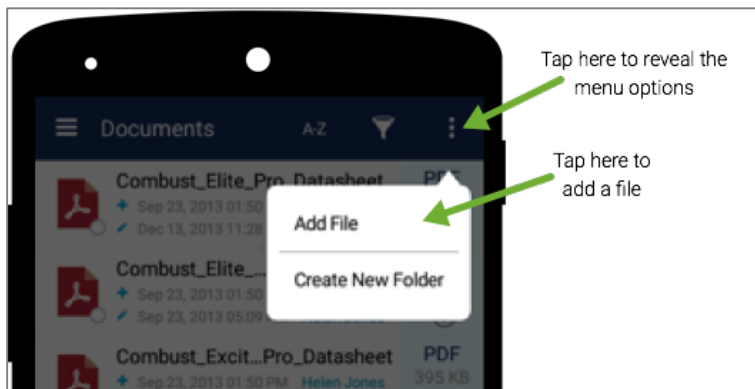
    Note: If you enter a File Name that already exists, a naming conflict will occur. The section Naming Conflicts discusses how to resolve such a conflict.

5. Tap **OK** to upload the file. The **Properties** (metadata) popup appears.

6. Add the required metadata and tap on **SUBMIT**. The Colligo logo will rotate as the file is being added.

Adding a file from another app

To add a file from another app:

1. Launch the app containing the file you wish to add.

2. Locate the file(s) you wish to add and then long press to select the file or files.

3. How you share the file with Briefcase for Android will depend upon the app you are in. Some common apps are described below

    a. **Downloads:** Tap the **Share** icon to bring up the sharing options:
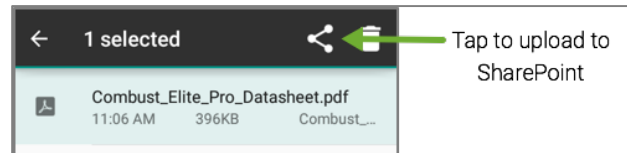
Figure 28 – Sharing a file from Downloads

    b. **Dropbox:** First mark the file as offline. From the **Offline files** list, bring up the options for the file and then scroll down and tap on **Export**.

    c. **Google Drive:** Tap the 3-dot-menu to bring up more options, then tap **Send File**

4. When the menu of apps appears, tap on **Colligo Briefcase**:

Figure 29 – Sharing options when sharing from Downloads

5. Tap on **Colligo Briefcase**

6. The **Select Upload Location** popup appears

Figure 30 – Select Upload Location

7. Browse to the desired upload location by navigating from a Site or by selecting a Favorite.
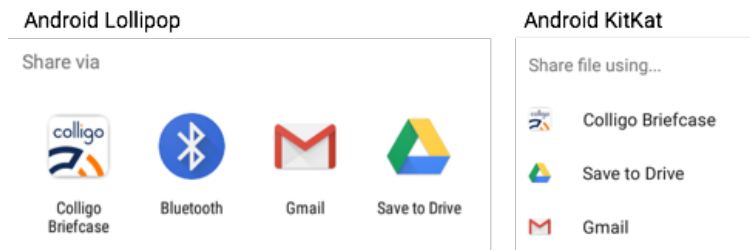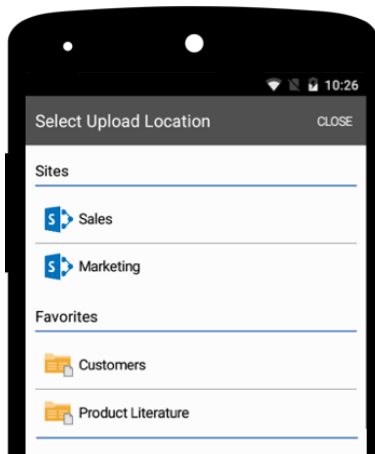
8. When you have reached your desired location, tap **UPLOAD**.
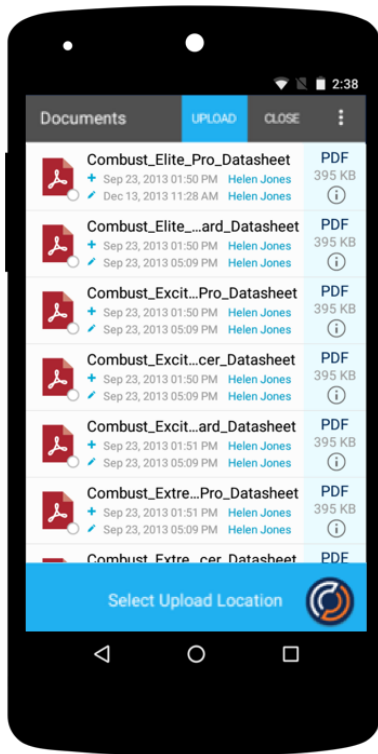
Figure 31 – Upload Location Selected

9. The **New File** popup appears.

    a. If desired, rename the file.

    b. **Note:** If you enter a File Name that already exists, a naming conflict will occur. The section Naming Conflicts, discusses how to resolve such a conflict.

10. Tap **OK** to upload the file.

11. The **Properties** (metadata) popup appears.

12. Add the required metadata and tap on **SUBMIT**.

    a. The Colligo logo will rotate as the file is being added. An Orange file status indicator will appear on the file while it is being uploaded. When the upload has completed, the file status indicator will turn to white.

13. Tap **CLOSE** when the file upload has completed.

Settings and Sync Now

When viewing a site, tap the Colligo logo in the lower right corner and additional icons will appear. This is where you access Sync settings as well as the icons to initiate a manual sync at the current location level or for all sites. Tap a sync icon to initiate a manual Sync. The Colligo logo will rotate clockwise while the sync is taking place.
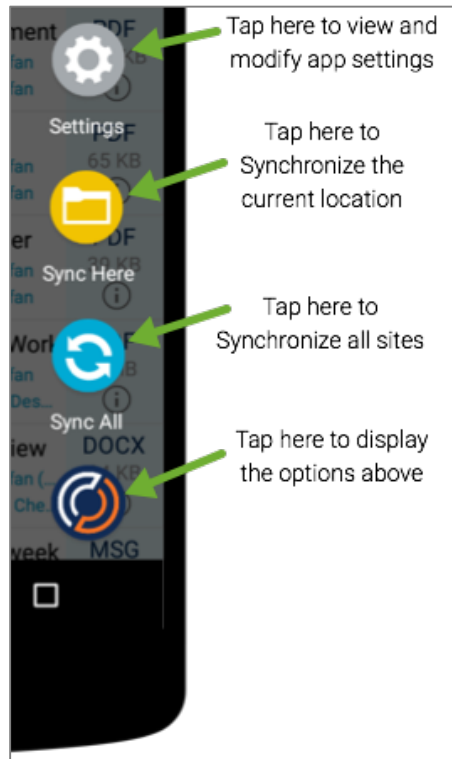
Figure 32 – Synchronization settings

The following additional settings are available when you tap on **Settings**:

- Sync Interval (30 minutes, 5 minutes, 10 minutes, 15 minutes, Hourly, Daily)
- Sync Over WiFi Only
    - When this setting is enabled and a site is added, the site will display in the Sites list, but Briefcase for Android will not synchronize with SharePoint until a WiFi connection becomes available.
- Current Storage Usage
- Send log file to Colligo Support

Troubleshooting

Naming Conflicts

A naming conflict will occur when:

- Two users, or two apps try to update the same file. This will result in a sync time naming conflict.

- A user adds a file with the same name as an existing file. This will result in an add time naming conflict if the file is already on your device and in a sync time naming conflict if the file is already in SharePoint.

When a sync time naming conflict occurs, you will see an exclamation mark in a red badge pop up on the corner of the sync button.

Resolving an Add Time Naming Conflict

If you enter a File Name that already exists on your device, this message will be displayed: **Name conflict or invalid name….** Enter a new name and click **OK**.

Resolving a Sync Time Naming Conflict

To resolve a sync time naming conflict:

1. Press the sync button and then the **Sync Info** button. This will display a list of conflicting items.

2. Select a conflicting item to compare the discrepancies.

3. You will be presented with 3 choices:

   - **Overwrite Remote**: this will overwrite the file on SharePoint

   - **Rename Remote**: this will rename the file on SharePoint.

   - **Rename Local:** this will rename the file being synced from the Briefcase App.

4. Resolve the conflict at your discretion.

5. When all conflicts are resolved, exit the screen and a sync will commence.

6. When the sync is complete, your choice of resolution will be in effect.

How to Request Support

Support for Five-For-Free users is provided in the Colligo community which is at https://colligo.com/support/basic.

Users with paid support can open a ticket by clicking the **Get Support** button in Colligo Console.

Feedback

Briefcase for Android

To submit feedback for the app, tap **App Feedback** on the main view.

Documentation

Please send feedback on this document to documentation@colligo.com