Colligo Engage Windows App 7.0

User Guide

Contents

COLLIGO ENGAGE WINDOWS APP

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

Key Features

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

Benefits

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

Platforms Supported

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

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

Colligo Engage Windows App Interface

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

The stand-alone product is launched from the **Start** menu or from the system tray icon and displays as follows:
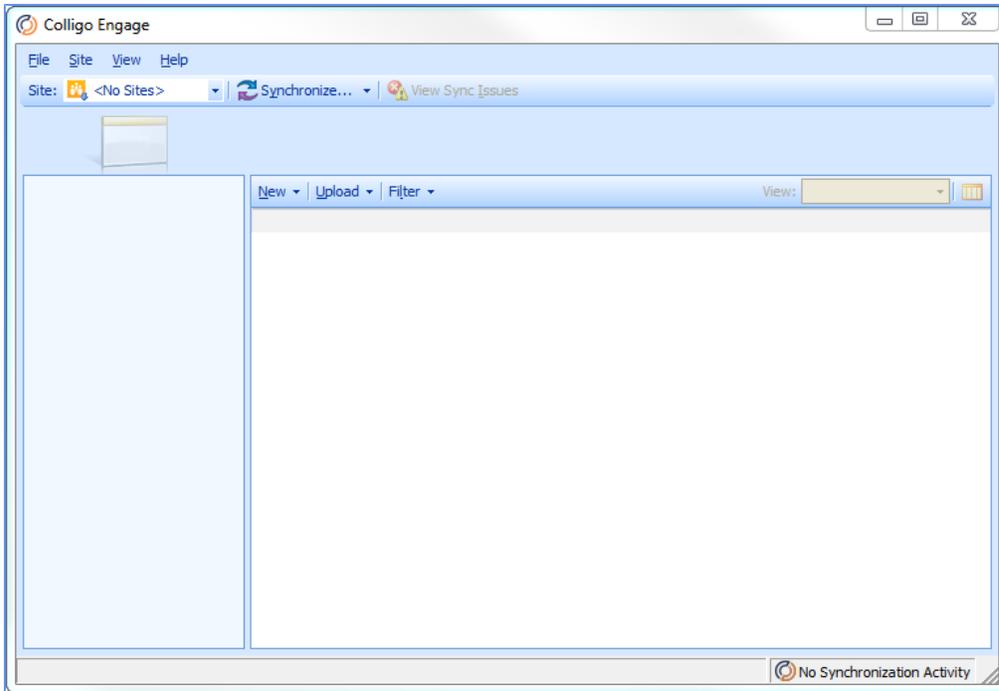
The Windows Explorer extension displays as **Colligo Colligo Engage Windows App** under the Computer node:
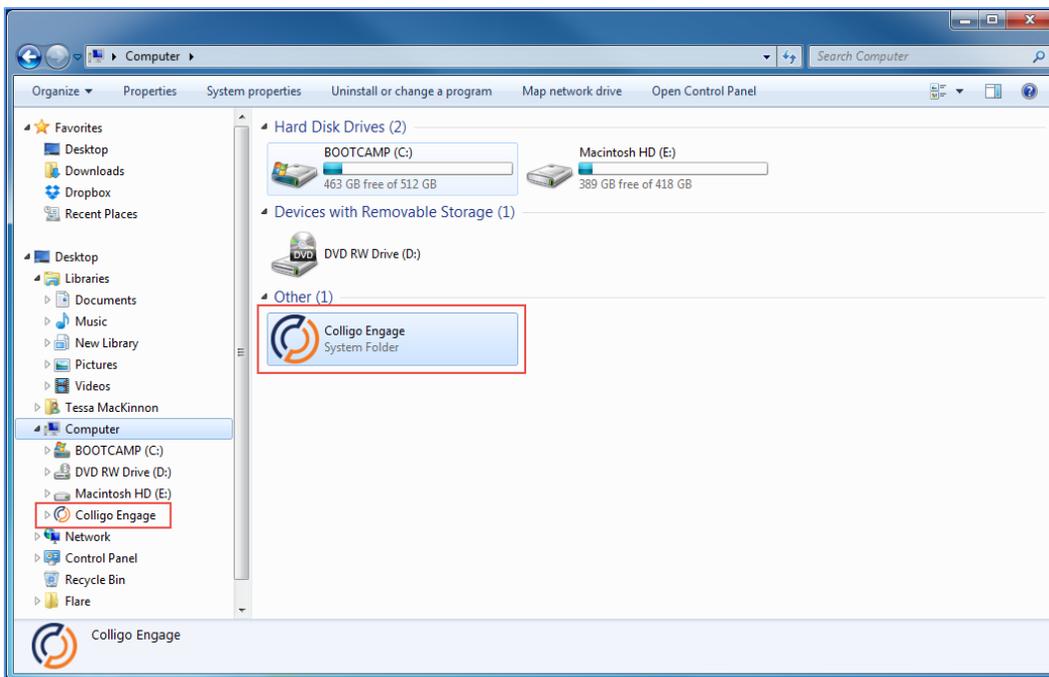
INSTALLING AND ACTIVATING COLLIGO ENGAGE WINDOWS APP

To install and activate Colligo Engage Windows App:

1. Double-click to open the Colligo Engage Windows App XX.zip file and extract the contents.
2. In the folder, double-click the folder that corresponds with your operating system:
   a. **x86**: choose this option if you have a 32-bit operating system
   b. **x64**: choose this option if you have a 64-bit operating system
4. Double-click Setup.exe .
5. Follow the steps in the install wizard.
6. After installation is complete, enter your information to activate the software.
7. If you are unable to connect to the activation server, an error message displays:
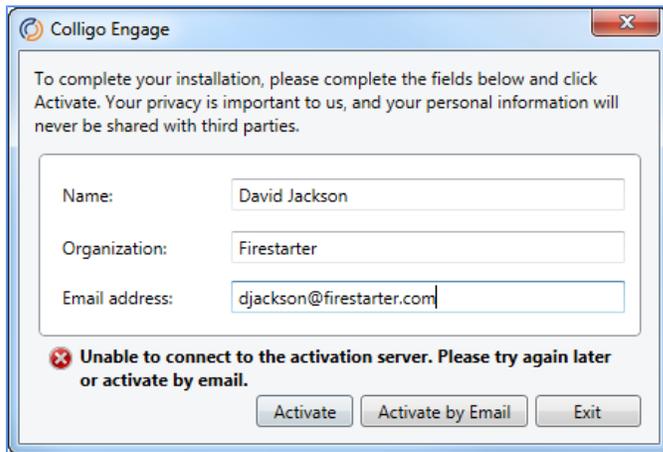
> *NOTE:* The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

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

Checking for Updates

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

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

Updating Your License Key

To change your license key:

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

   The **Enter License Key** dialog displays:

Enter License Key

Please enter your 25-digit license key (include dashes):

[   ]

[OK]   [Cancel]
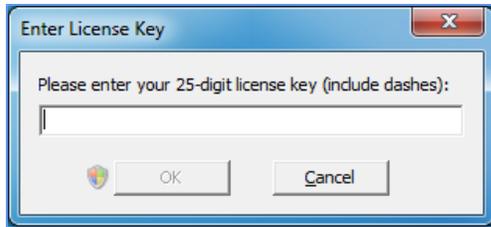
2. Enter your license key and click **OK**.

CONNECTING TO COLLIGO ENGAGE CONSOLE

If your solution includes Colligo Engage Console, the prompt displays when you are connected:
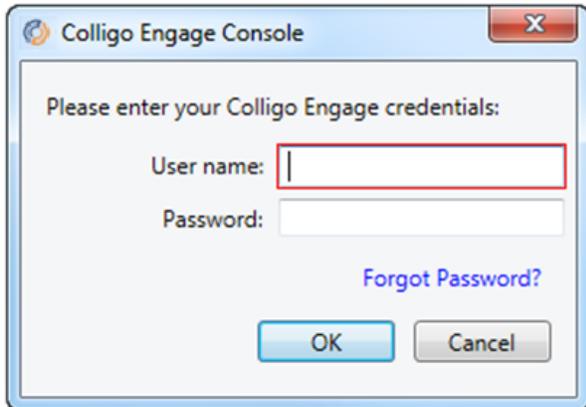
Enter your **User name** and **Password** and click **OK** to connect.

If you have forgotten your password, click **Forgot Password?**
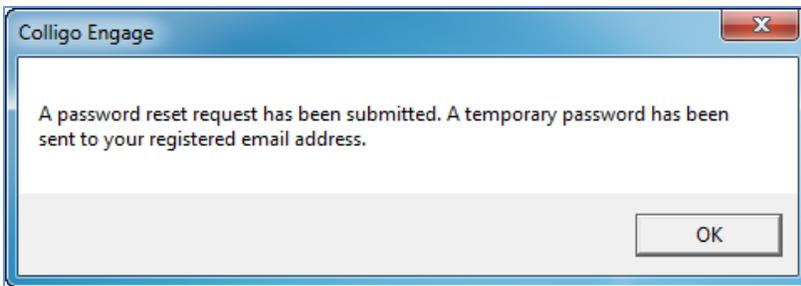
ADDING SHAREPOINT SITES

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

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

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

To connect a site from the Colligo Engage Windows App stand-alone interface:

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

The **Download New Site** dialog displays.

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

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

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

    The **Select Filters for Synchronization** dialog displays:

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

Using the Download New Site Dialog (Windows Explorer Interface)

To connect a site from the Windows Explorer interface:

1. Right-click the **Colligo Engage** node and select **Download New Site** from the contextual menu:
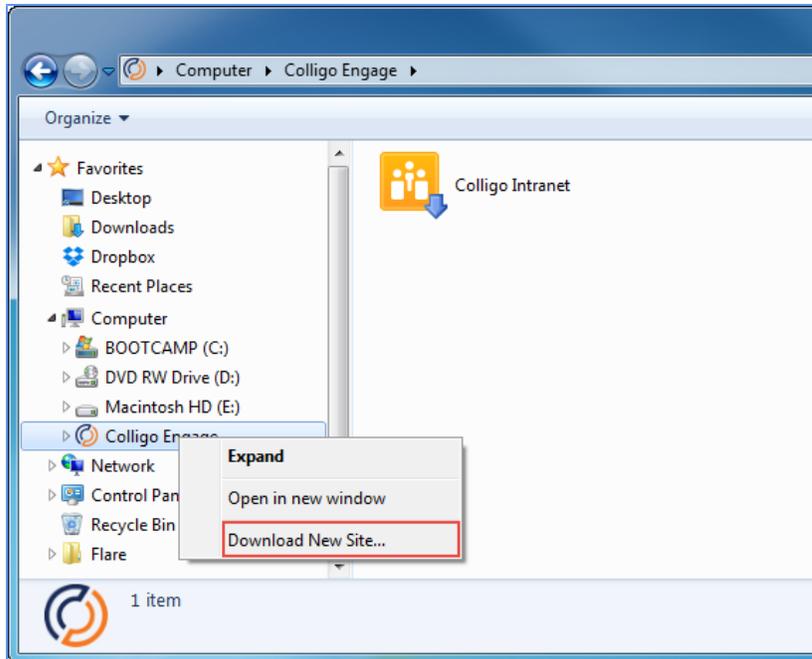
The **Download New Site** dialog displays.

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

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

4. To synchronize a list or library, right-click it and select **Enable Synchronization**. To select filters for synchronization, right-click a list or library and select **Filter Synchronization**.
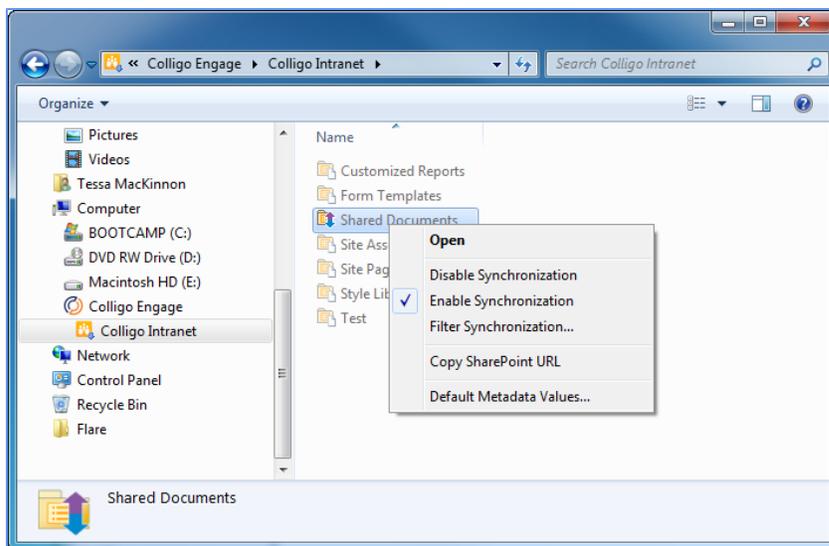
After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:

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

Open Colligo Engage

✓ Automatic Synchronization

Synchronize All

View Synchronization Status

Cancel Synchronization

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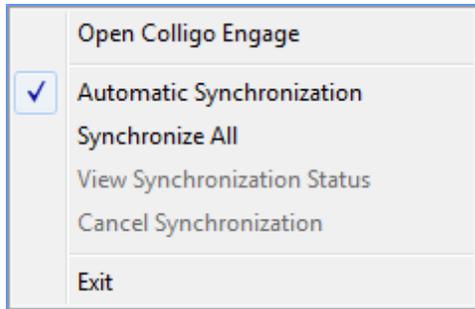
- From the **Site** menu in the stand-alone Colligo Engage interface, choose one of the following options:
  - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the Synchronize Multiple Sites dialog, check your preferred sites and click Synchronize.
  - **Synchronize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

Using the Connect to Windows App Button

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

The **Download New Site** dialog displays.

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

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

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

   The **Select Filters for Synchronization** dialog displays:

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

Editing Lists and Libraries

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

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

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

OR

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

    The **Download New Site** dialog displays:
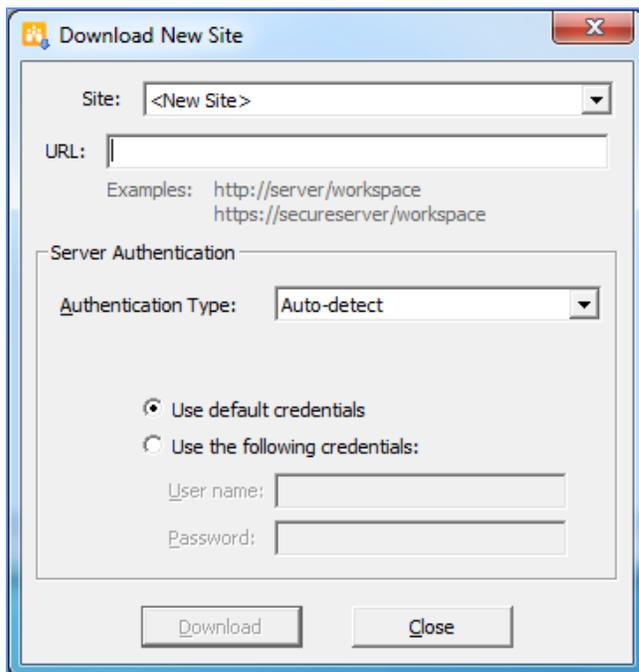
2. From the **Site** drop-down list, choose which site you want to configure.

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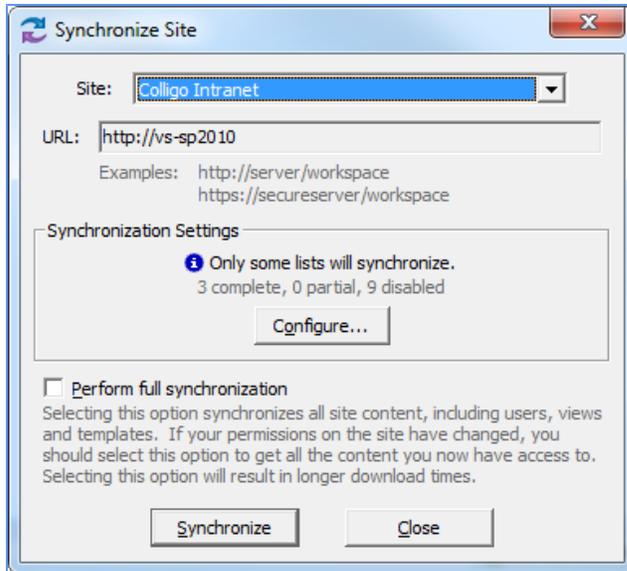
3. Click **Configure**.
4. In the **Configure Synchronization** dialog, choose which Lists and Libraries you want to sync.
5. Click **OK**.
6. Click **Synchronize**.

Removing a Site

To remove a site from Colligo Engage Windows App:

1. From the **Site** menu, choose **Manage Sites**.

   The **Manage Sites** dialog displays:
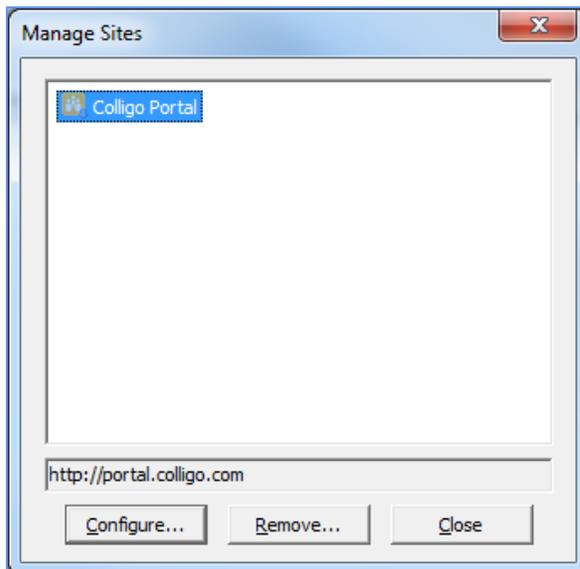
2. Select the site you want to remove and click **Remove**.

OR

1. Select the site you want to remove in the **Site** field:
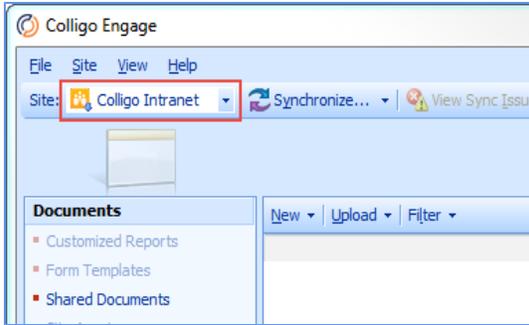
2. From the **Site** menu, choose **Remove Site**:
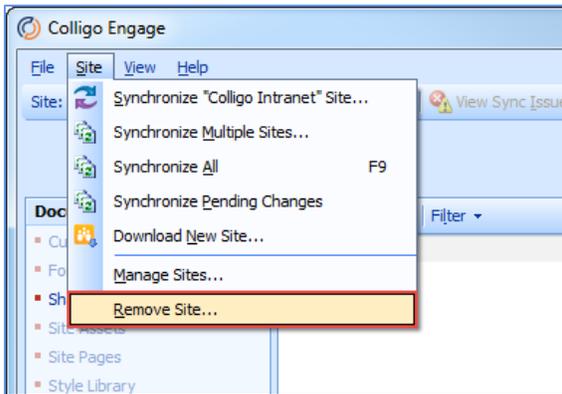
SETTING SYNCHRONIZATION OPTIONS

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

Configuring Automatic Synchronization Options

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

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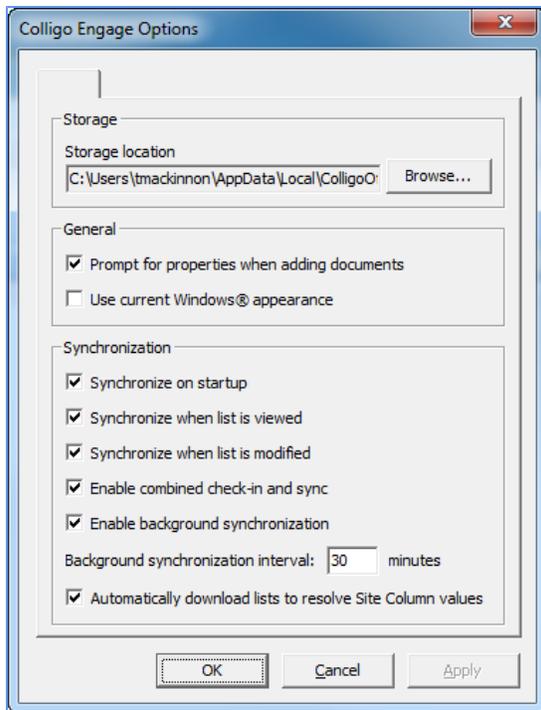
2. In the General section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring default metadata; see **Setting Default Metadata in Briefcase**.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

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

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

## Synchronizing Sites Manually

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

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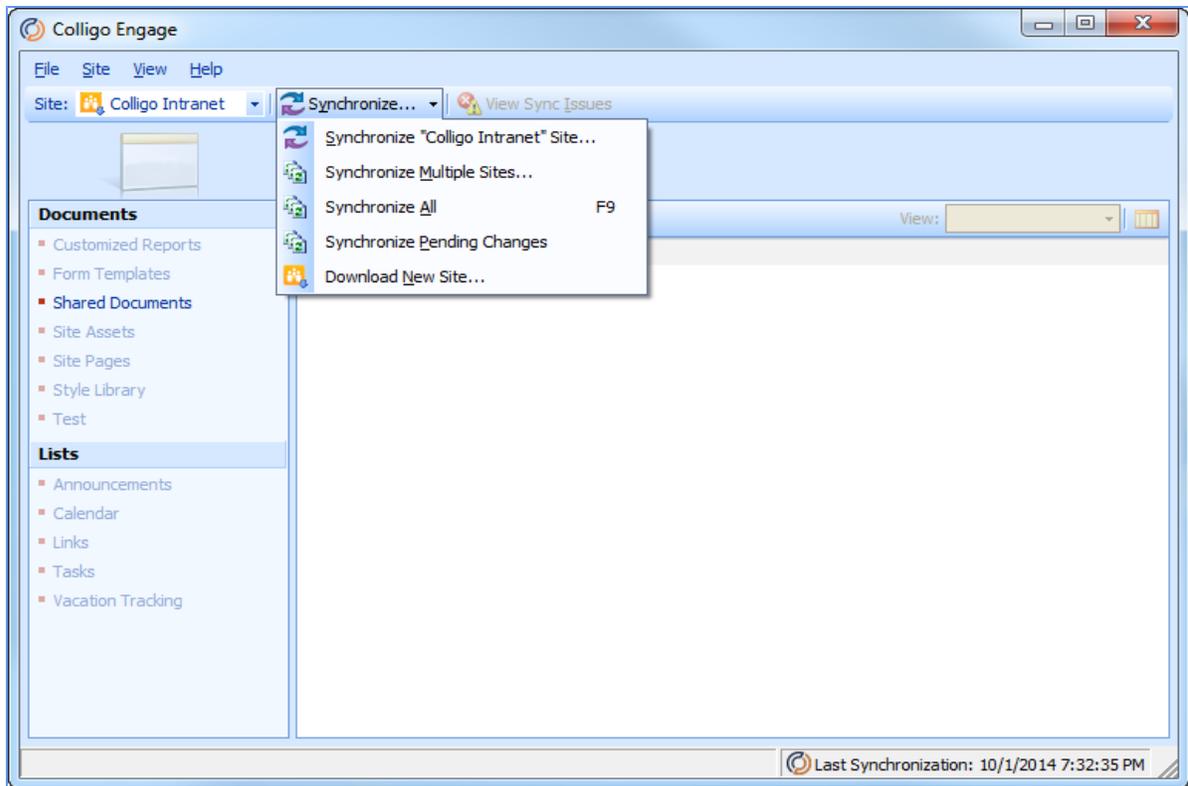
2. Choose from the following:
   - **Synchronize Site**: select this option to synchronize the site currently displayed
   - **Synchronize Multiple Sites**: select this option to display all sites and choose which ones you want to synchronize
   - **Synchronize All**: select this option to synchronize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

The **Synchronization In Progress** dialog displays for any of the above options:
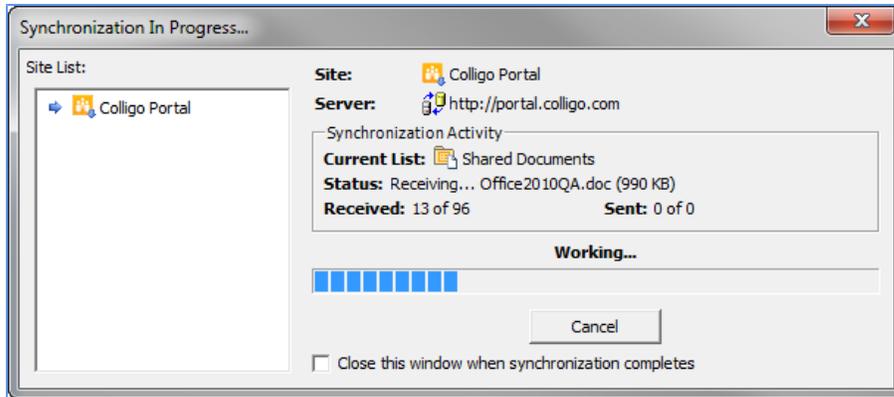
The **Status** field displays the name and size of the file being synchronized, as well as if the file is being sent or received.

Viewing Pending Changes

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

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

Completing a Full Synchronization

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

## Viewing and Resolving Synchronization Issues

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

There is also a dialog that pops up from the system tray icon to indicate a sync error; you can click the pop up for more information about the :
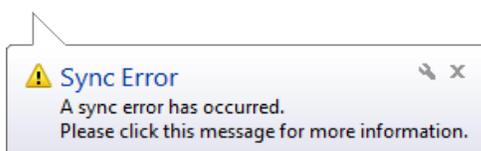
In addition, the **View Sync Issues** button changes color so it is more visible.

You can click the **View Sync Issues** button to display the **Sync Issues** pane:
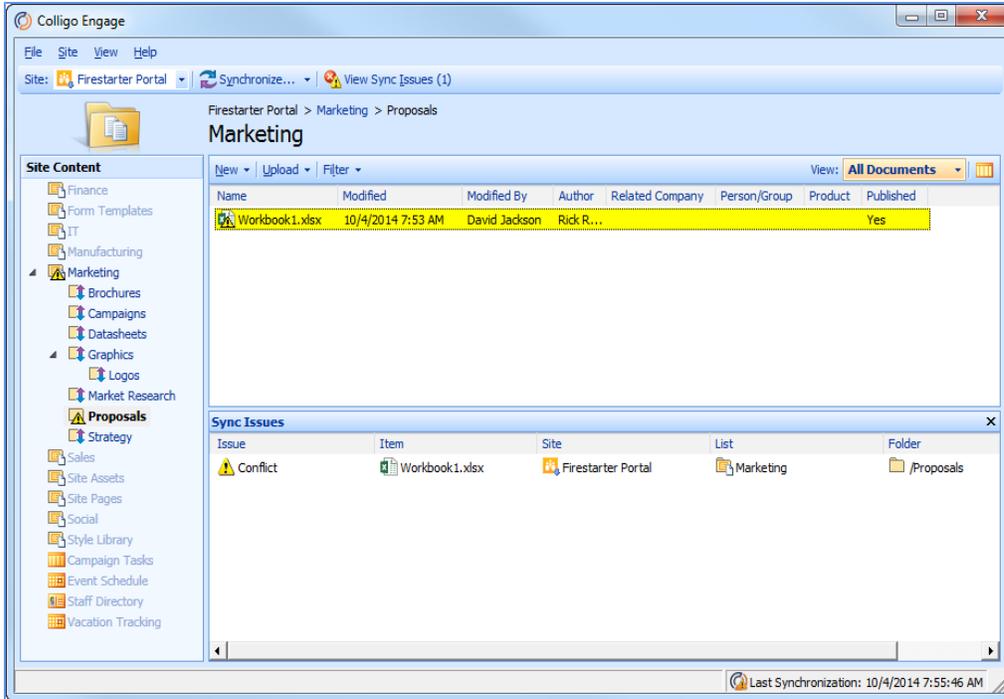
The sync error displays the type of issue, the item name, site, list, and folder. You can use these columns to sort your sync issues.

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

The **Resolve Synchronization Conflict** screen displays:
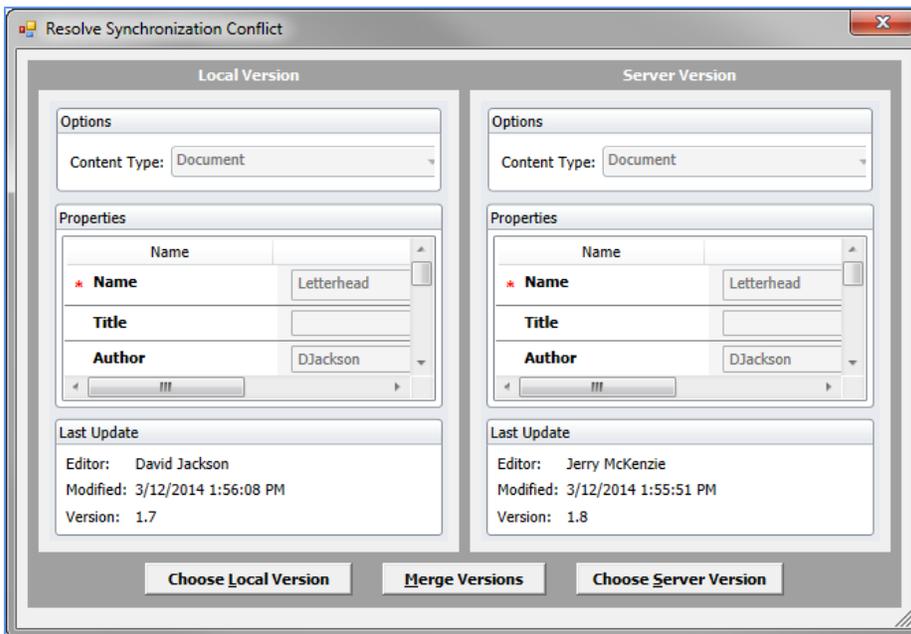
You can choose to merge the two versions, or choose either the local or server version to resolve the conflict.

VIEWING, EDITING, AND CREATING NEW CONTENT IN COLLIGO ENGAGE WINDOWS APP (STAND-ALONE INTERFACE)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Colligo Engage Windows App interface.
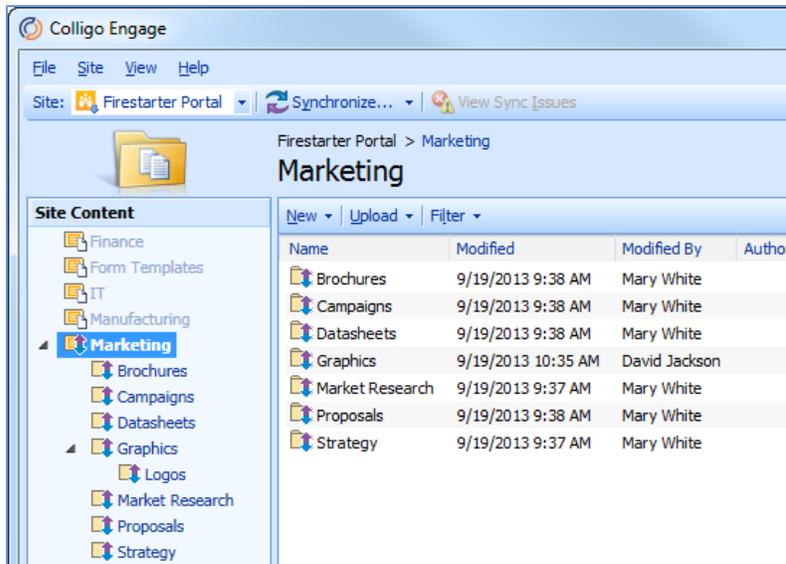
The Tree View in the stand-alone interface allows you to view content more dynamically and to move and copy content between folders in the same SharePoint site using drag-and-drop. You can change the view by enabling or disabling the **Tree View** option in the **View** menu:
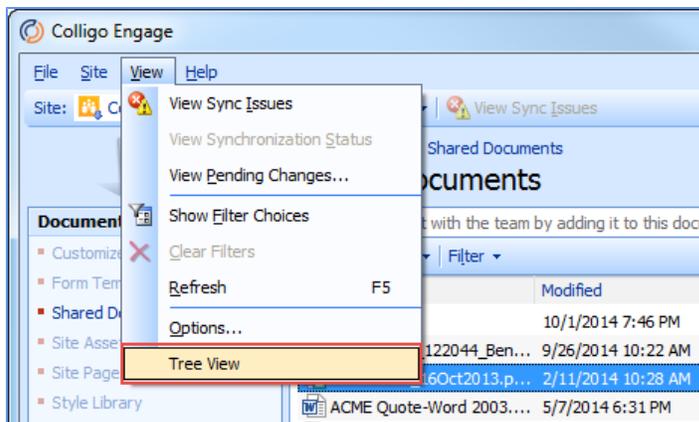
NOTE: you cannot enable or disable synchronization of document libraries or lists while Tree View is enabled. If you want to do this, you must turn off Tree View and work in List View.

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

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

- Sync error: ![icon]
- Sync pending: ![icon]
- Checked out by me: ![icon]
- Checked out by another user: ![icon]
- Declared Record: ![icon]

Viewing Content

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

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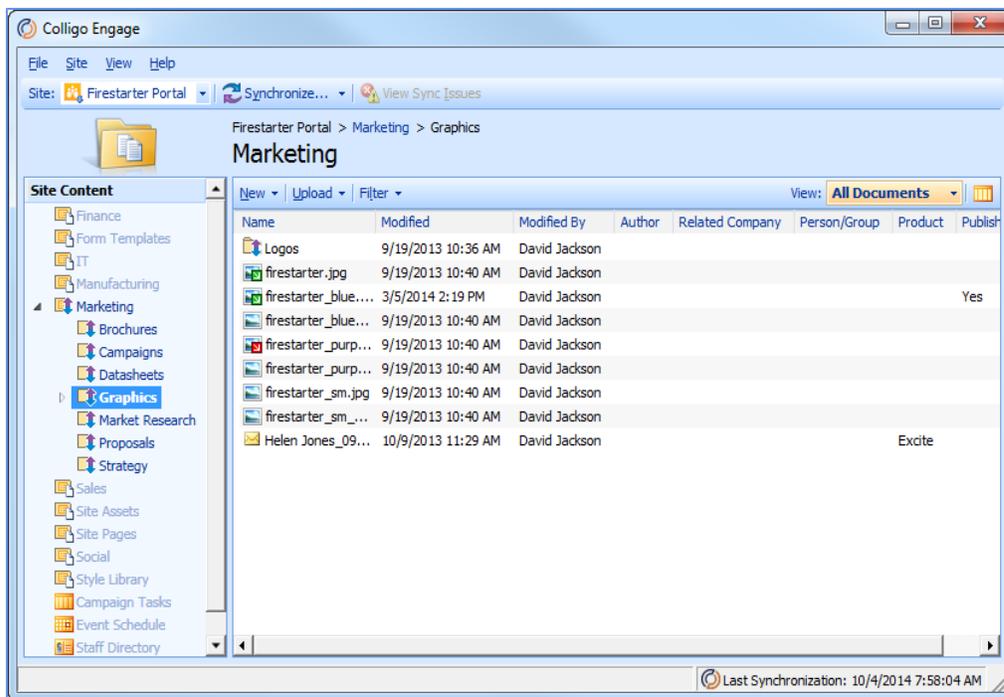
Viewing Item Version History

If a library has versioning enabled, you can view an item's version history by choosing the **Version History** option in the right-click contextual menu:
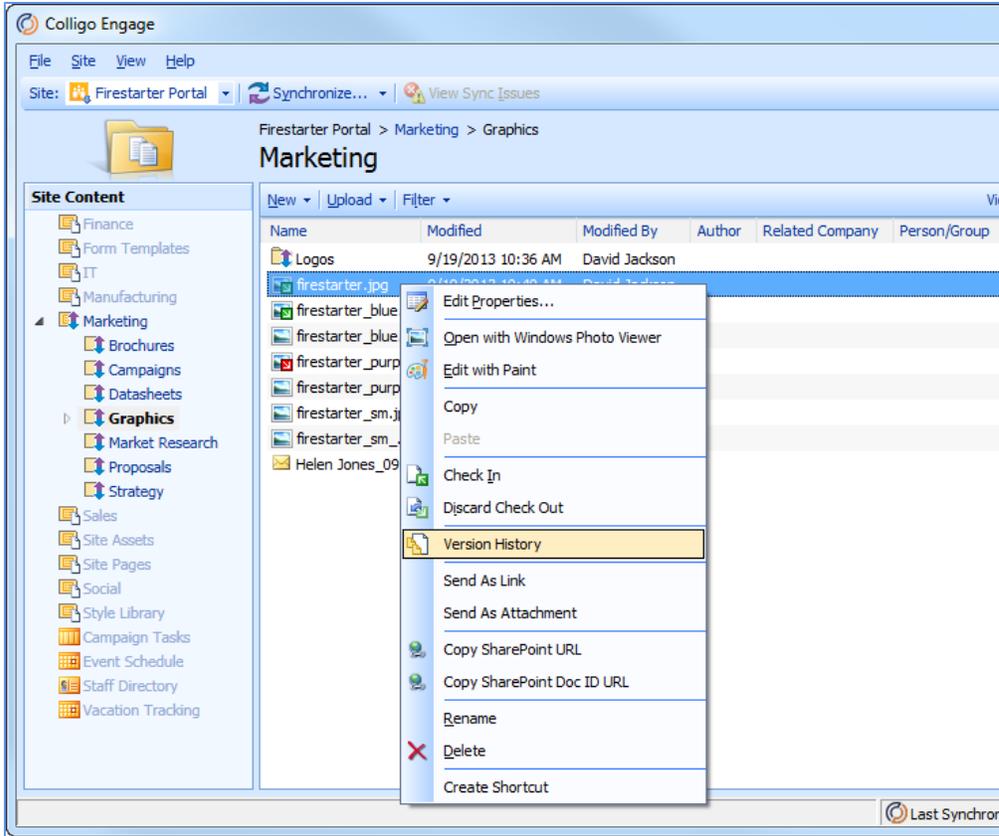
NOTE: this feature is enabled only when you are connected to your SharePoint server. If you are offline, the option is greyed out.

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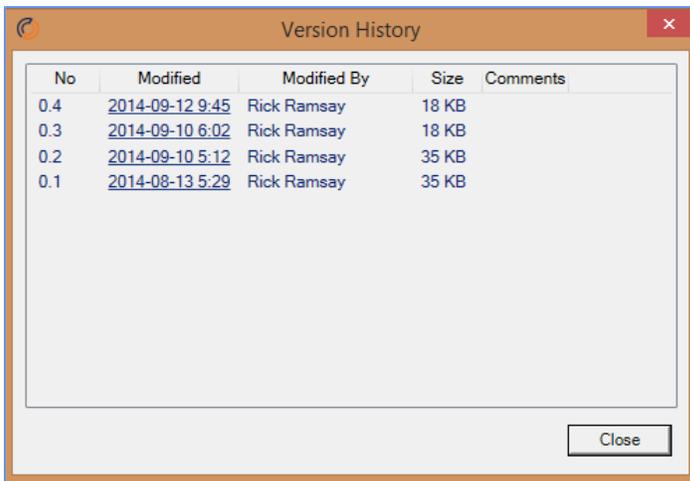
Click on a version number to open the SharePoint version of the item.

Emailing a Link or an Attachment

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

Choose either **Send As Link** or **Send As Attachment** from the contextual menu:
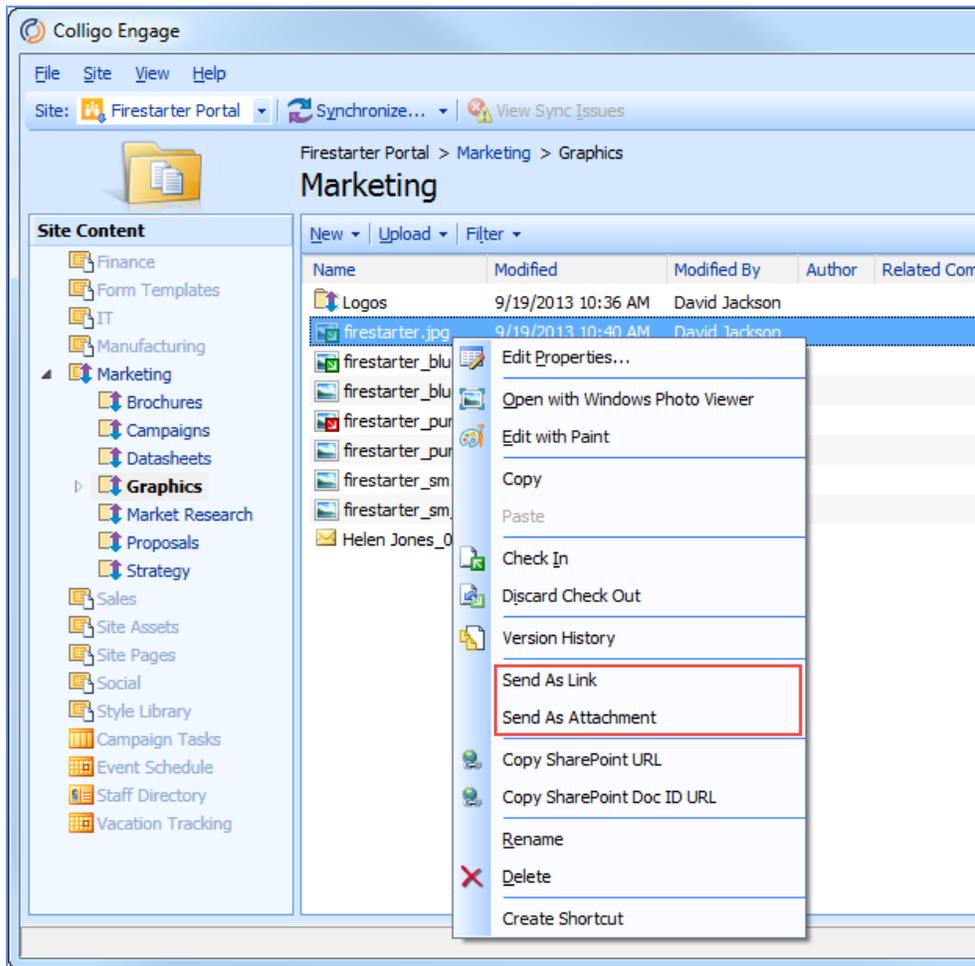
Choosing one of these options launches your mail client with the link or physical attachment already present.

Creating a Shortcut to an Item

You can create a shortcut to any SharePoint item from the contextual menu:
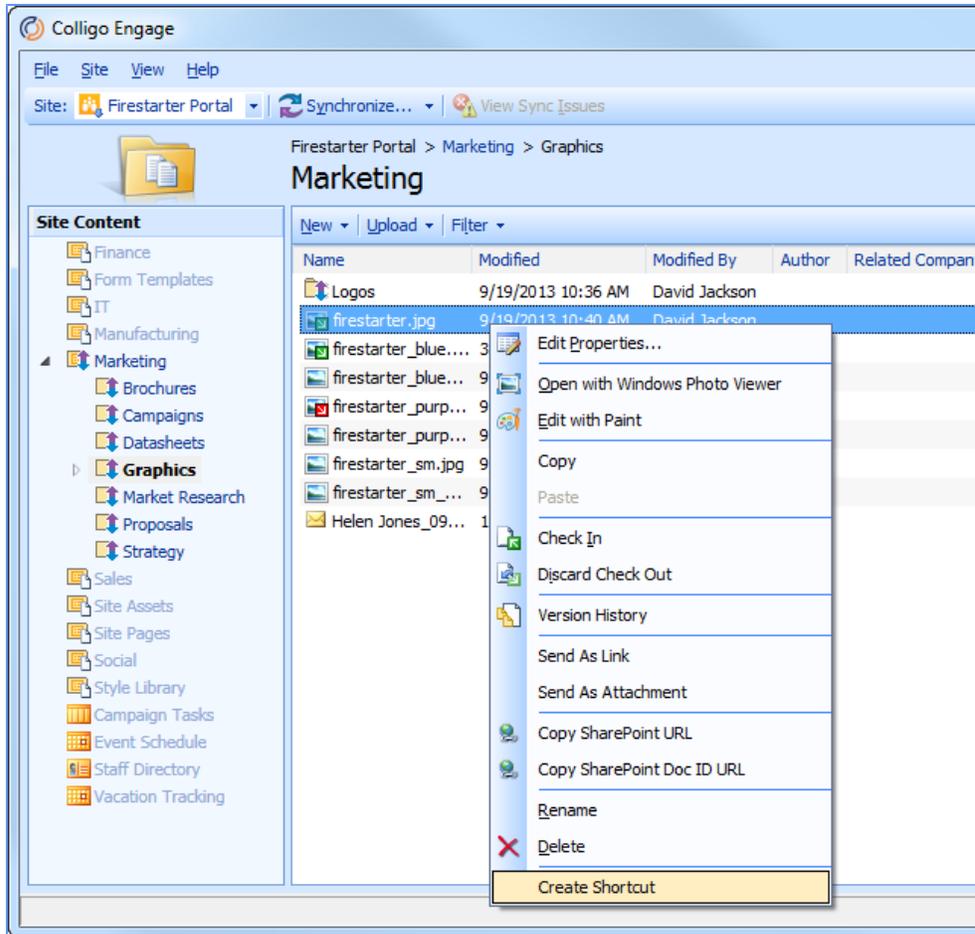
The default location for the shortcut is your desktop.

Editing Content

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

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

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

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

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

Editing Item Properties

To edit the properties of an item:

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

The **Edit Properties** dialog displays.

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

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

Checking Items In or Out

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

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

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

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

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

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

Renaming Items

To rename an item:

1. Right-click it and select **Rename**.
2. The item name becomes editable. Edit as preferred, and press **Enter** to complete the change.

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

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

Deleting Items

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

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

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

Creating New Content

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

You can add items to Colligo Engage Windows App in one of the following ways:

- Create new documents from the Colligo Engage Windows App menus
- Upload existing content
- Drag-and-drop or copy-and-paste content

Adding a New Document to a List/Library

To add a new document to a list or library:

1. Select the list or library you want to add the document to and click the **New** menu and select your preferred document type from the drop-down list:
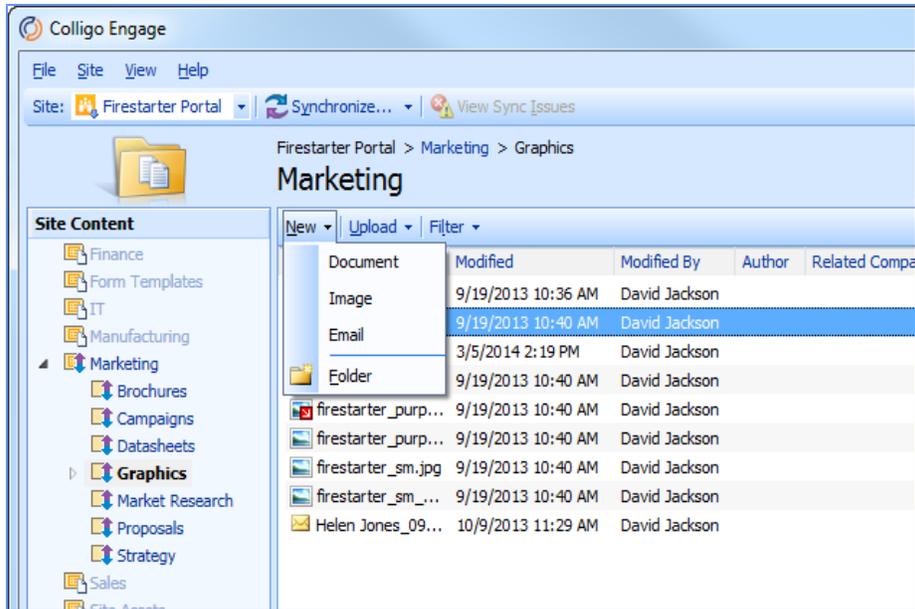
The **Create New Document** dialog displays:
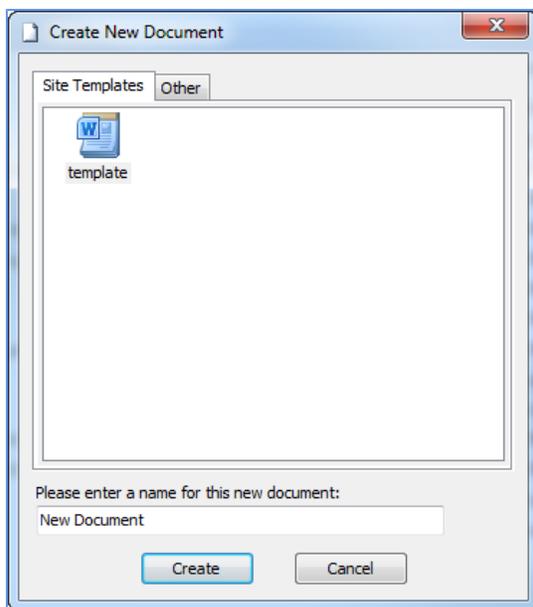
2. Choose your document type from the **Site Templates** tab or the **Other** tab.
3. Enter a name for the document, and click **Create**.

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

4. Edit the **Edit Properties** dialog as preferred.
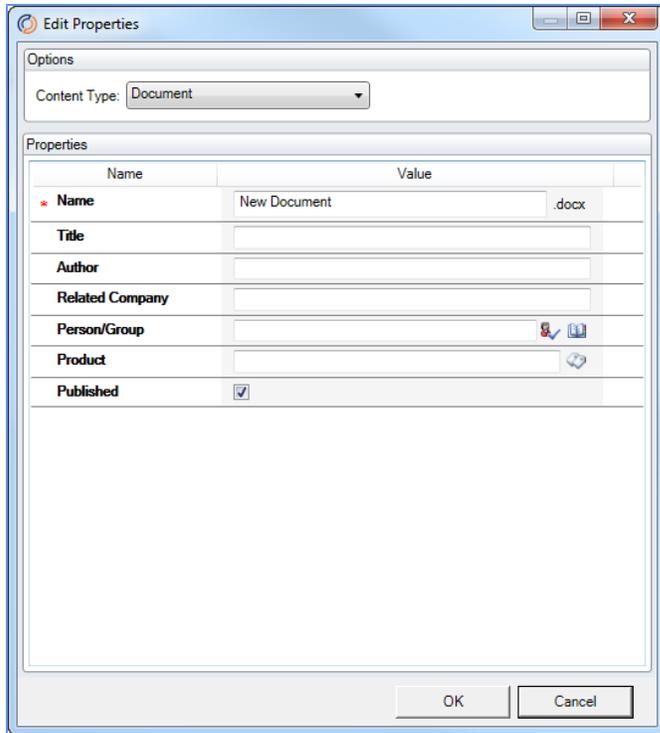
5. Click **Create**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

To add an existing document to a list or library:

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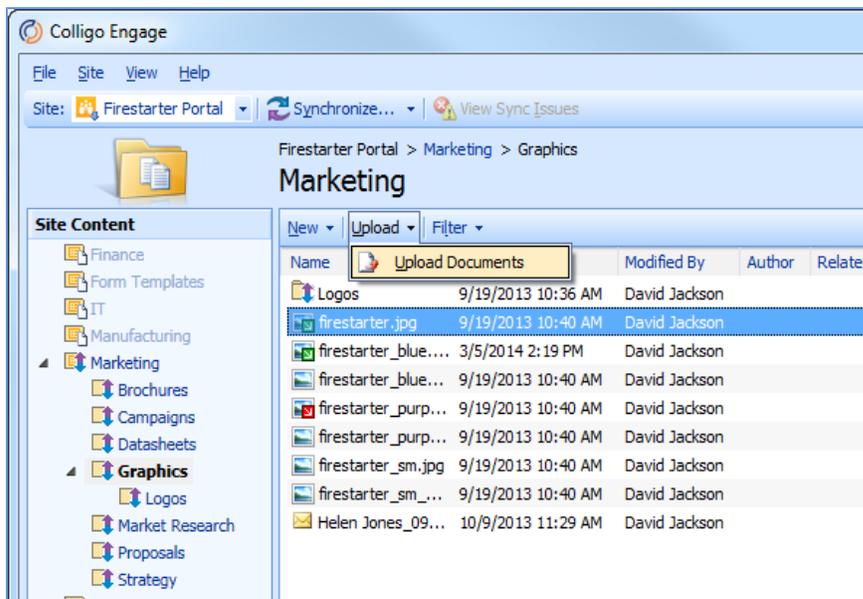
The **Upload Documents** dialog displays.

2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.

3. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.

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

Dragging-and-Dropping Content

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

1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in Colligo Engage Windows App .

2. The **Edit Properties** dialog displays. Edit as preferred and click **Create**. The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

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

Moving or Copying Content within SharePoint

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

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

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

   The **Edit Properties** dialog displays.

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

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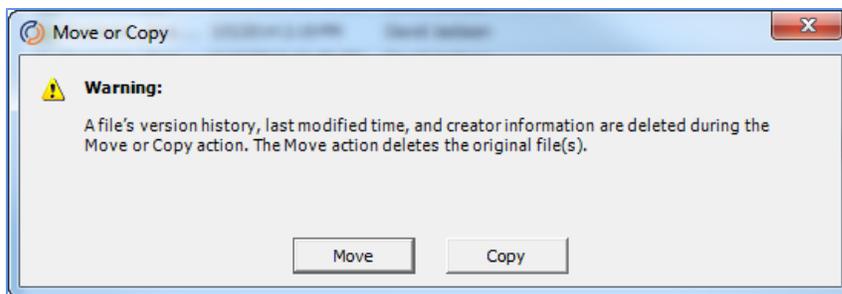
3. Click **Move** or **Copy**. Note that no version history, timestamps, or original author information is preserved in either the Move or Copy action. If you choose to move an item, the original file is deleted. In addition, any metadata associated with the original file will not be preserved and you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

NOTE: You cannot move an item that is checked out by another user. If you attempt to do this, the following error message displays:
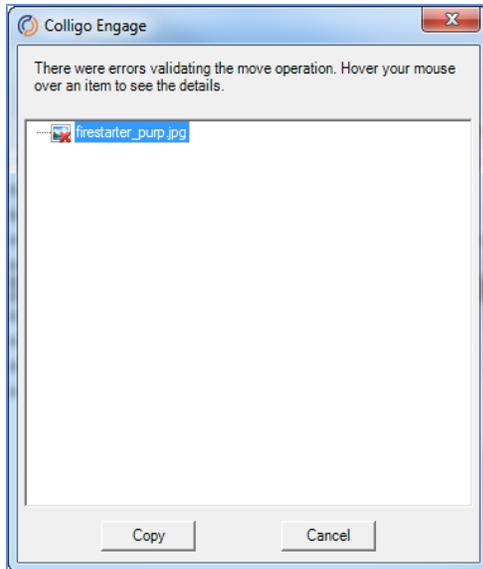
If you hover your mouse over the item, a message displays telling you who has the item checked out. That user needs to check the item back in before you can move the item.

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

Searching Content

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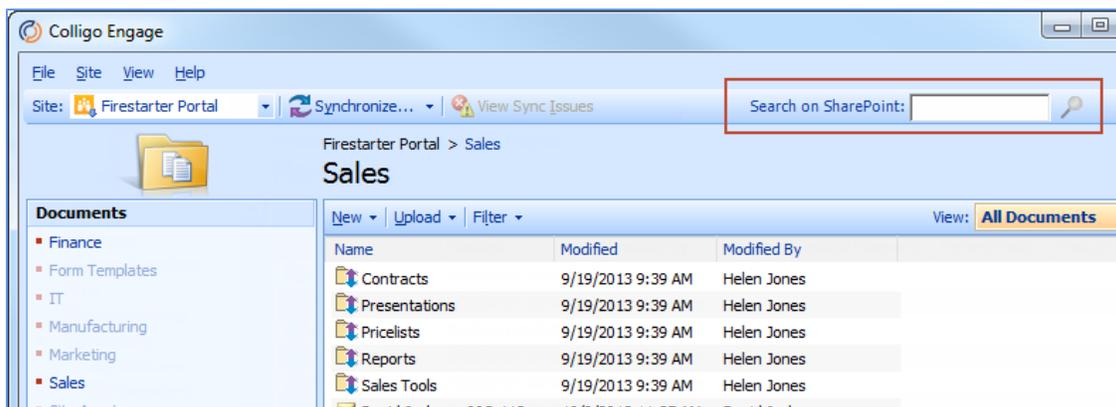

When you enter a term and press **Enter**, or click the magnifying glass icon, your web browser launches and the search results for the site display.

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

VIEWING, EDITING, AND CREATING NEW CONTENT IN COLLIGO ENGAGE WINDOWS APP (WINDOWS EXPLORER INTERFACE)

After you have added your sites and synchronized your lists and libraries, the content is available offline (when you are not connected to your SharePoint network). You can now view and edit SharePoint items, create new content, check items in and out of SharePoint, as well as rename and delete items, from the Colligo Engage Windows App interface.
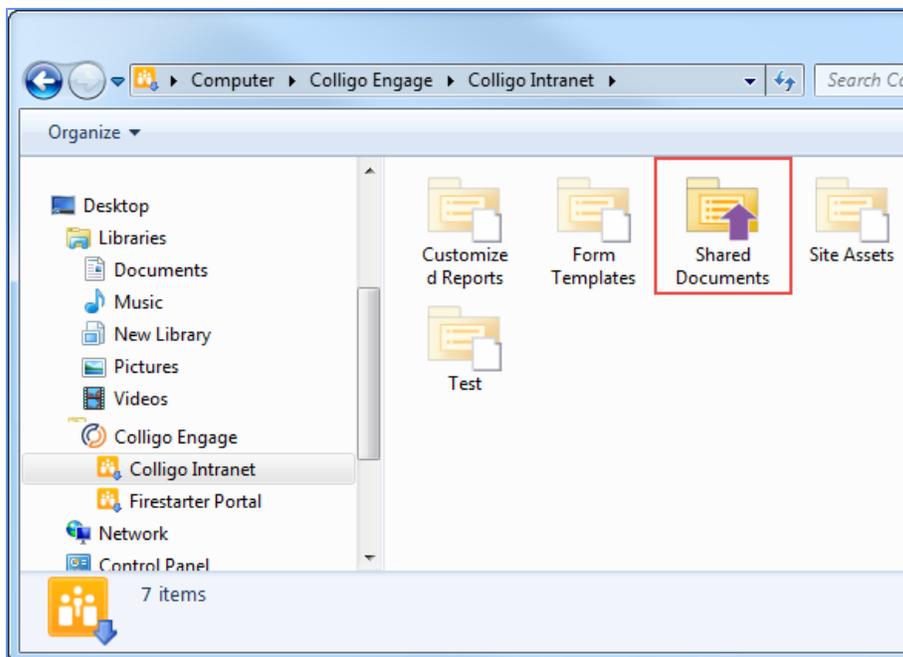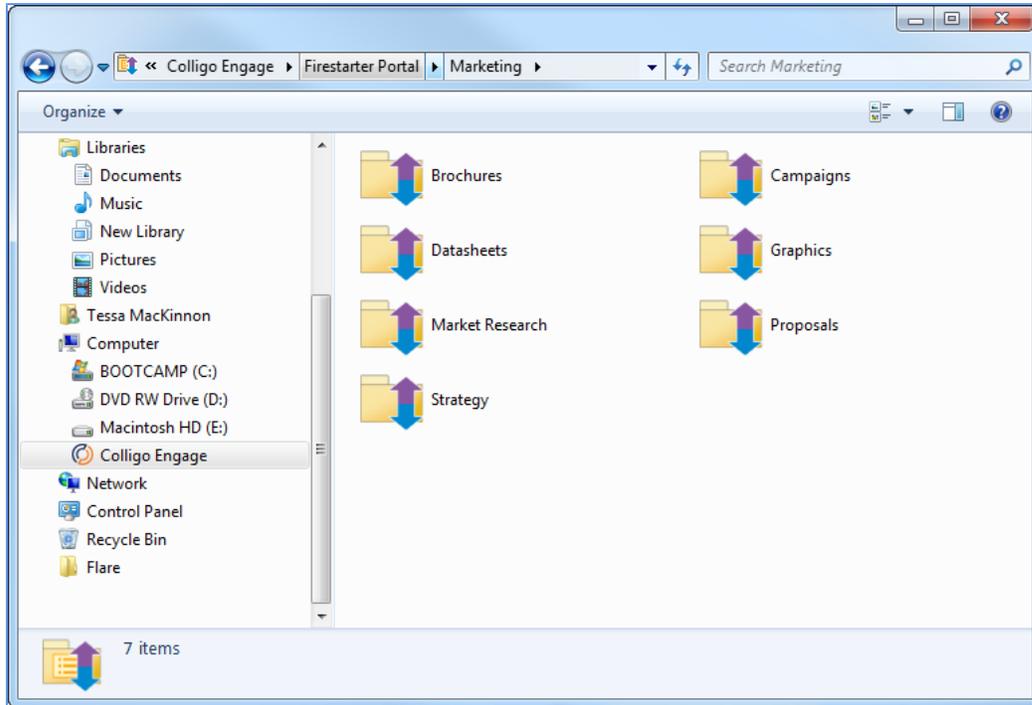
The following icons are overlaid on file type icons to indicate the following item statuses:

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

Viewing Content

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

Emailing a Link or an Attachment

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

Choose either **Send As Link** or **Send As Attachment** from the contextual menu:
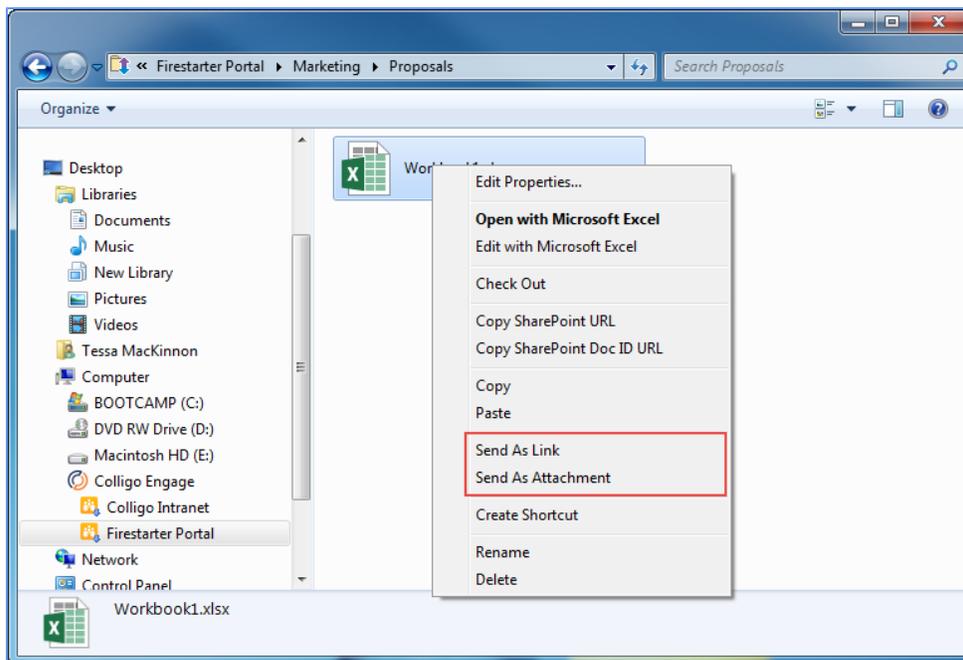
Creating a Shortcut to an Item

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

Editing Content

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

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

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

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

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

Editing Item Properties

To edit the properties of an item:

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

The **Edit Properties** dialog displays.

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

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

Checking Items In or Out

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

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

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

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

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

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

Renaming Items

To rename an item:

1. Right-click it and select **Rename**.
2. The item name becomes editable. Edit as preferred, and press **Enter** to complete the change.

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

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

Deleting Items

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

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

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

Creating New Content

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

You can add items in the Windows Explorer extension of Colligo Engage Windows App in one of the following ways:

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

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

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

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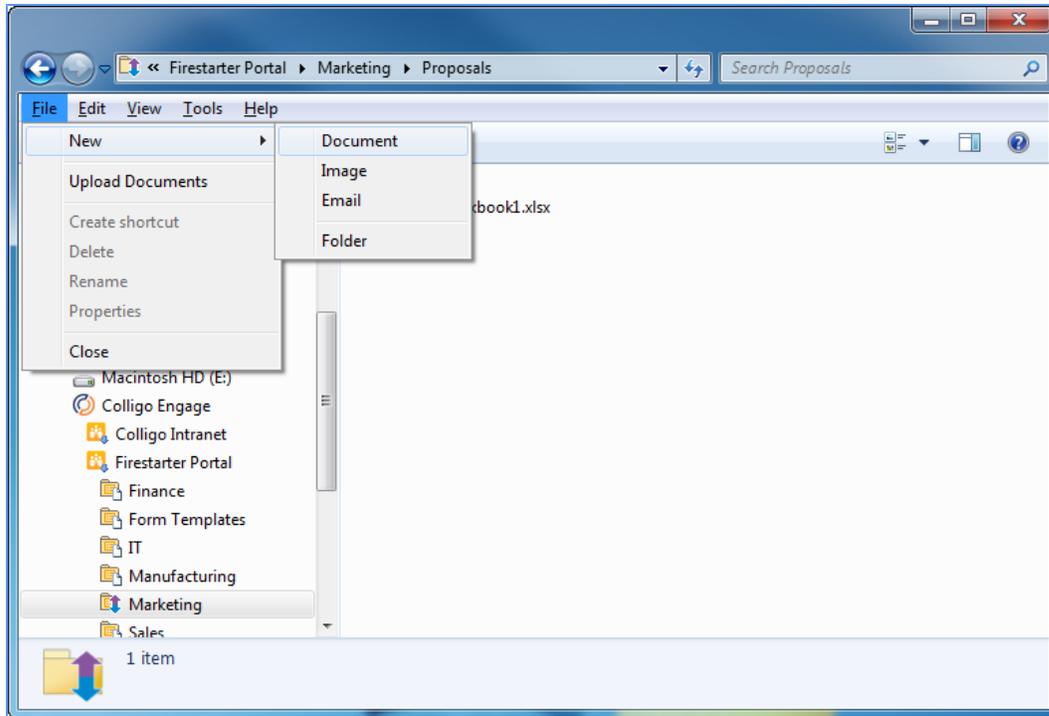
NOTE: if you cannot see the **File** menu, press **Alt** key to display it.

The **Create New Document** dialog displays:

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

   The **Edit Properties** dialog displays.

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

Using the Upload Documents Dialog

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

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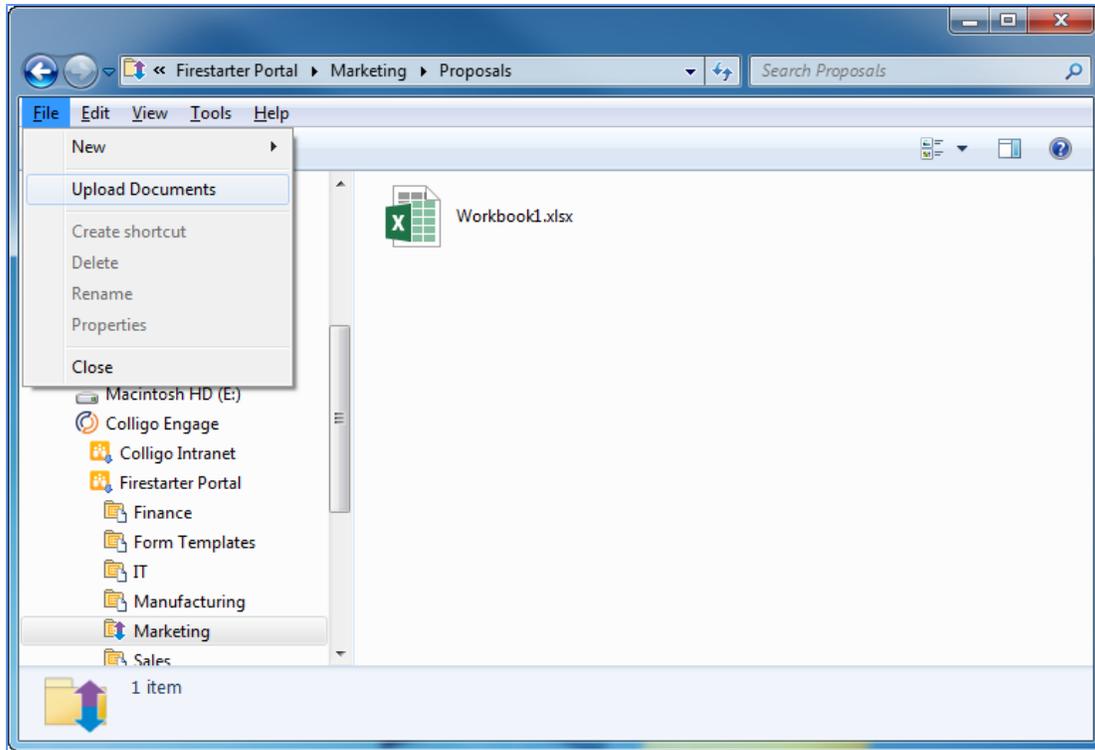
NOTE: if you cannot see the **File** menu, press the **Alt** key to display it.

The **Upload Documents** dialog displays.

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

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

Dragging-and-Dropping Content

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

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

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

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

Using the File Save As Command

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

1. In your open document, select **File > Save As**.
2. In the **Save As** dialog, navigate to your SharePoint location, edit the file name as needed, and click **Open**:
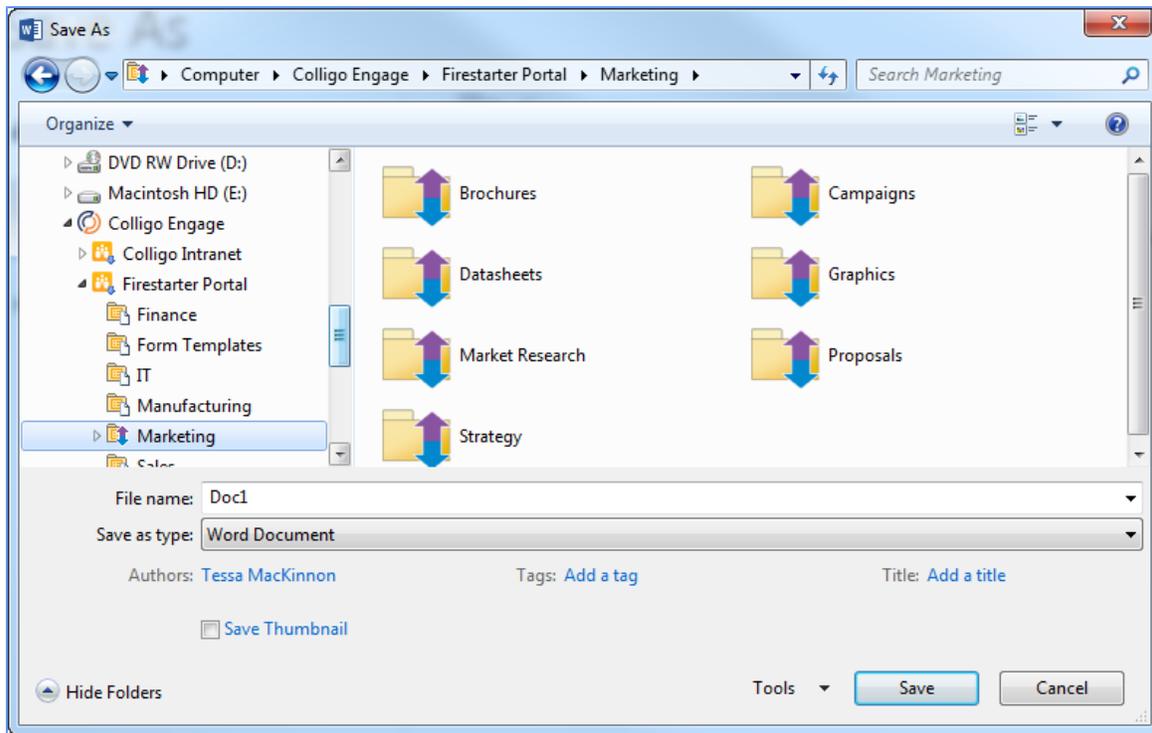
3. The **Edit Properties** dialog displays. Edit as preferred and click **Close**.

   The document is added to the SharePoint location.