

Colligo Engage for Mac

Administrator's Guide

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Introduction

This document provides guidance for your deployment of Colligo Engage for Mac, hereafter referred to as Colligo Engage. User documentation is available on the Colligo support website at

<http://www.colligo.com/support/>

For any further technical details please contact Colligo Technical Support at <http://colligo.com/request>.

For sales related question please contact Colligo Sales at sales@colligo.com.

Target Audience

- IT Administrators
- Technical Evaluators
- Deployment Managers

Overview

Colligo Engage lets you easily store, sync, view and find SharePoint content on your Mac. You can access and share files, lists, images, documents, and emails. Synchronize SharePoint content to your Mac automatically, for instant access, even when offline, as well as create, edit, or modify documents for automatic upload to SharePoint when back online.

Key Features

- Integration with Finder
- Metadata prompt
- Keep SharePoint content offline for fast access, even when you are not on the network
- Share files easily using links
- Upload files and photos to SharePoint
- View and edit document and file properties, including metadata

Platforms Supported

- SharePoint 2010, 2013, and Online (Office 365)
- Microsoft Office 2011 or 2016 for Mac
- Any Mac running OSX 10.8, 10.9, 10.10, or 10.11

SharePoint Security & Privileges

By using SharePoint's web services to access SharePoint data, Colligo Engage respects all privileges defined on the site. Colligo Engage supports most standard sign-on processes supported by SharePoint, including support for default credentials and other specified credentials. Passwords are stored in the keychain.

Colligo Engage supports both Claims-based and Forms-based authentication as well as ADFS. SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for uploading documents to SharePoint.

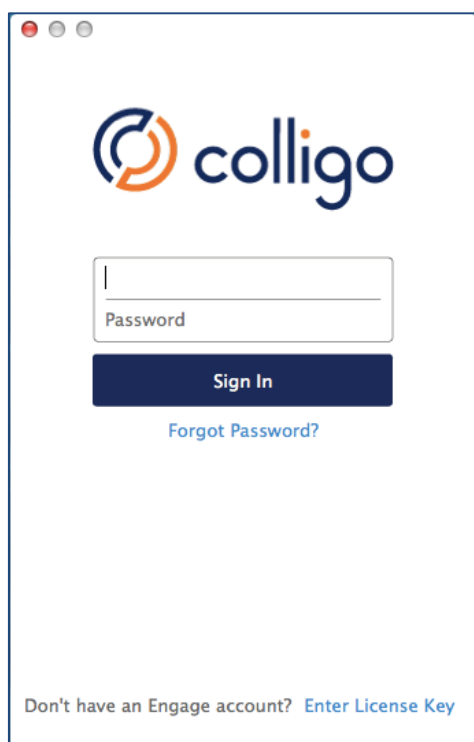
Installing Colligo Engage

There are two possible methods of installation: Individual user deployment or deploying the APP package using a Mac application deployment tool.

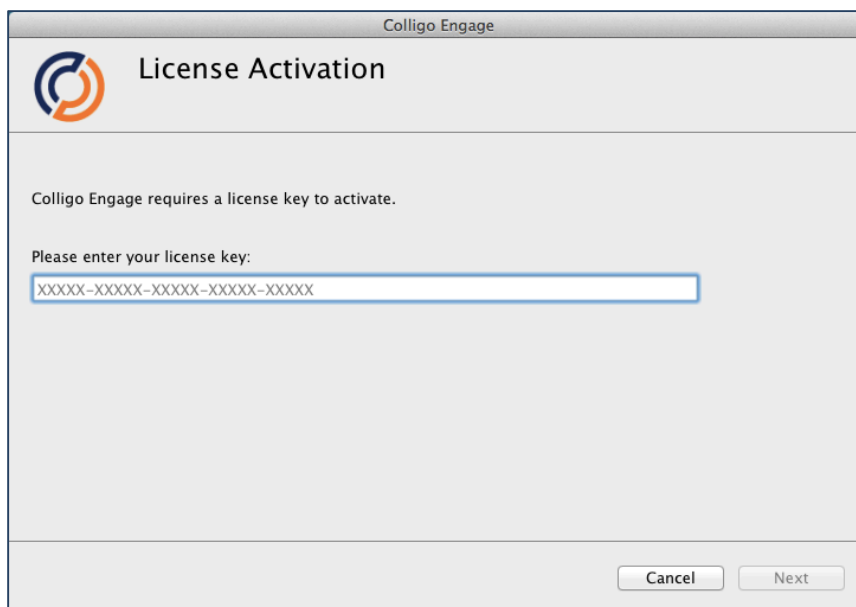
Individual User Installation

To install Colligo Engage:


1. Double-click the .dmg file to launch the installer.
2. Drag and drop the **Colligo Engage** icon into the **Applications** directory.
3. Double-click to launch the product.
4. In the following screen, you can enter your Engage Console credentials and click **Sign in**:



5. If you don't have console credentials, click **Enter License key**. The **License Activation** dialog displays:



6. Enter your license key and click **Next**.
7. In the subsequent screen, enter your information.
8. Click **Next**.
9. In the subsequent screen, click **Close** or click **Add Site**. Please see Error! Reference source not found..

The Colligo Engage icon displays in the top menu bar . You can now set your Preferences and connect to SharePoint sites.

Deploying the APP Package

The application package file included in the DMG can be deployed using any management tool.

User Permissions

Colligo Engage supports users who have either Administrator or Standard account permissions. Due to security controls enforced by OSX, only Administrator users are able to search files stored in the Colligo Engage volume using Spotlight. Standard users are able to search their Engage files within Finder on OSX 10.8, but are unable to search locally within the Engage folder with a Standard user account on 10.9 and 10.10.

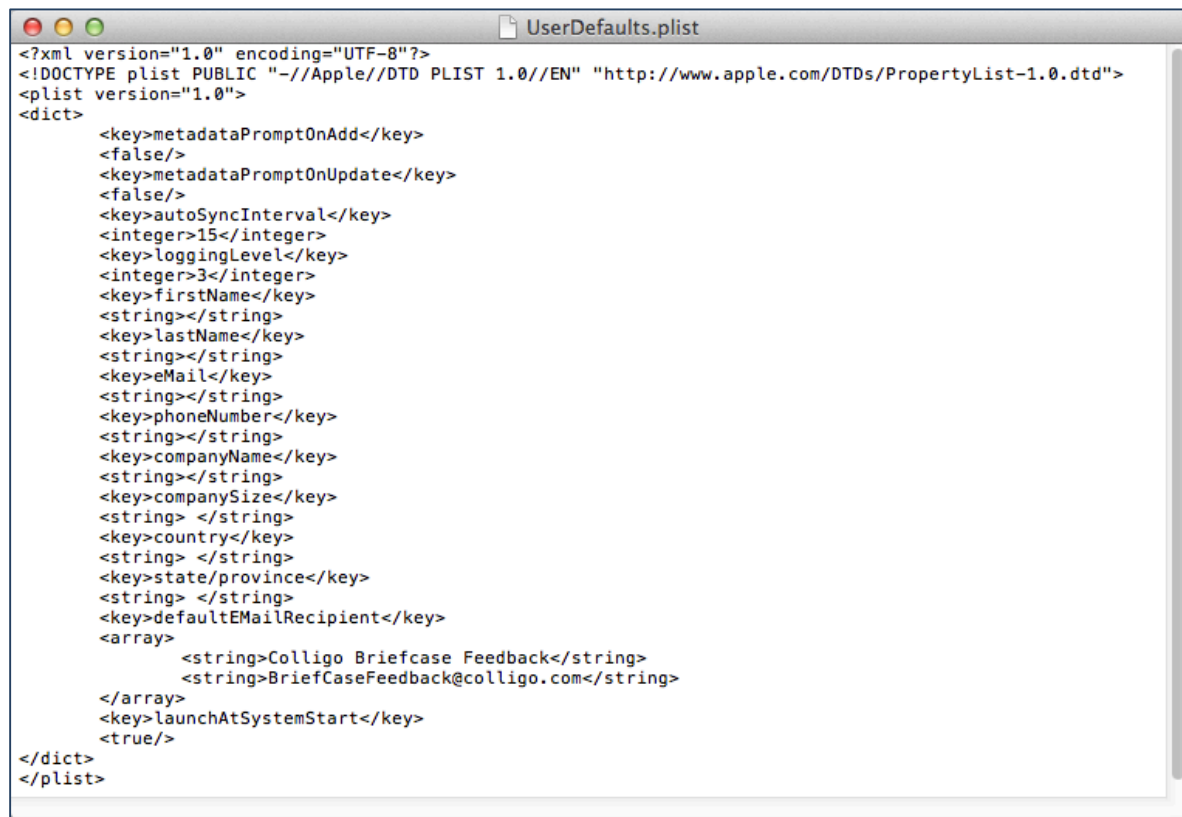
Configuration Options

Some default settings for the application package can be edited inside the application package in the UserDefaults.plist file.

Editing the Defaults File

To find and edit the UserDefaults.plist file:

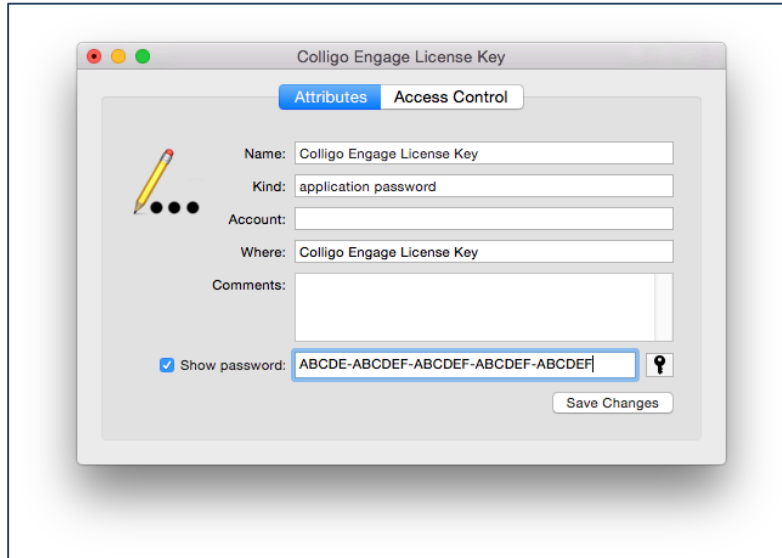
1. Navigate to the **Applications** folder in Finder, and right-click on **Colligo Engage**.
2. From the contextual menu select **Show Package Contents**.
3. In the **Contents** folder, click **Resources**.
4. In the **Resources** directory, located the UserDefaults.plist file.
5. Double-click the file to open in TextEdit:



6. You can edit this file to modify the following application settings:
 - a. **metadataPromptOnAdd**: If this setting is true, users see a metadata prompt when they add a new item
 - b. **metadataPromptOnUpdate**: If this setting is true, users see a metadata prompt when they update an existing item
 - c. **autoSyncInterval**: This setting determines the frequency of the auto sync; possible values are manual, 15, 30, 60 (all numerical values are in minutes)
 - d. **Colligo Engage Feedback**: This string is the subject line of the email that launches when users email their log files
 - e. **support@colligo.com**: This string is the email address that the log file email is sent to
 - f. **launchAtSystemStart**: If this setting is true, Colligo Engage launches at system startup

Licensing

If you are not connecting to the Colligo Engage console, the license is stored in the keychain. If a valid license isn't present, you will be prompted to enter one. When deploying the app centrally, you can preload a license into the keychain with the properties below:



Additionally, the app must have access to the license key via the **Access Control** setting.

Configuring SharePoint for Email Metadata

If you're managing emails in Colligo Engage, the metadata will be automatically extracted if you have an email-enabled library set up in SharePoint.

Colligo provides a sample list template file that can be used to create a sample testing document library. Download the template from the Colligo support site, install it to the List template gallery, and use it to create a new document library in your site.

Downloading the List Template

You can download the list template from the Knowledge Base article **How do I set default column names for email metadata mapping?** located at:

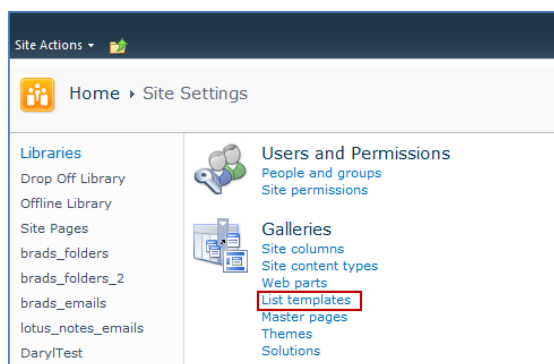
<https://community.colligo.com/entries/23216964>

Download the attachment *CfsEmailLibrary2010.zip*.

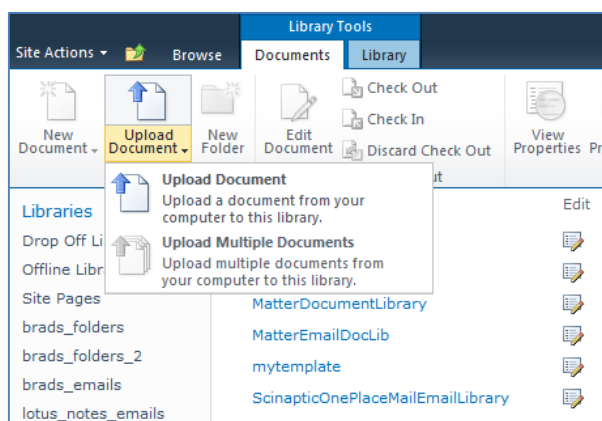
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

Installing the Sample List Template

1. Extract the list templates to the preferred location.
2. Navigate to the site collection you want to add the list template to.
3. In your SharePoint site, navigate to **Site Actions** -> **Site Settings**.
4. On the **Site Settings** screen, in the **Galleries** section, select **List Templates**:

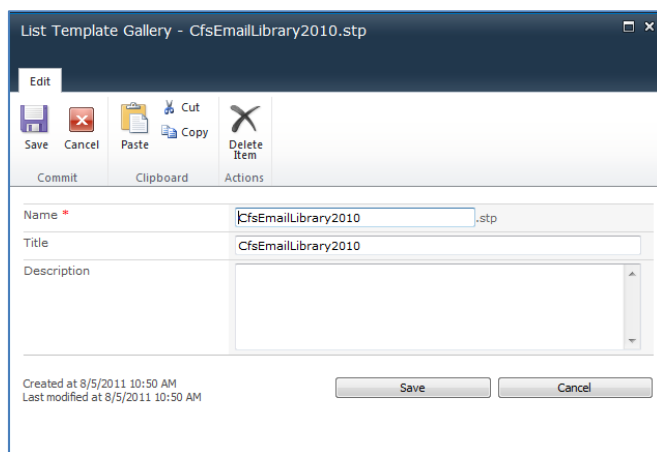


5. In the List Template Gallery, in the **Library Tools > Documents** ribbon, click **Upload Document**:



The **Upload Document** dialog displays.

6. Browse to the list template file (**CfsEmailLibrary2010.stp**) and click **OK**.
The **List Template Gallery** dialog displays:



7. Enter the following information:
- Name:** enter a name for the template gallery
 - Title:** enter a title that reflects the use of the template gallery
 - Description:** enter a description for the template gallery
8. Click **Save**.

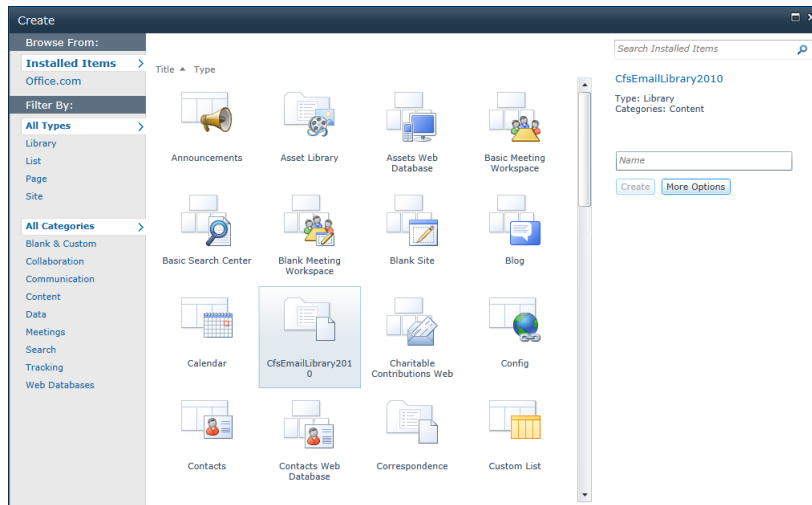
The new list template displays in the **List Template Gallery**.

Creating a Site

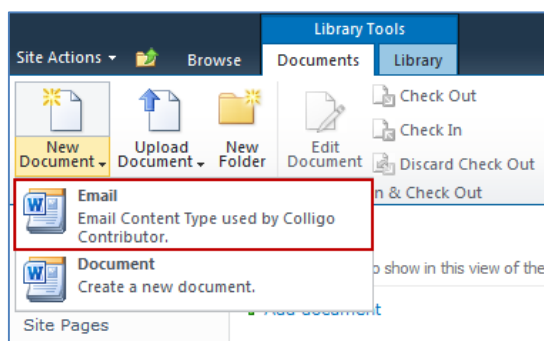
After you have installed the list template, you can create a new library based on the template.

1. Navigate to the site collection you want to add the list template to.
2. Select **Site Actions > More Options**.

The **Create** dialog displays.



3. Select the name of the list template you added.
NOTE: the name of the list template displays with the title you entered in step 7.b of Installing the Sample List Template.
4. In the right pane, enter a name for the library, and click **Create**.
5. Under the **Library Tools > Documents** ribbon, click the **New Document** drop-down arrow. The new Document Library displays as an option:



Manually Creating Content Types

Colligo Engage fully supports Content Types, and when working with Email documents Colligo recommends you create a content type for your email documents.

Enabling Metadata Extraction

To enable metadata extraction to a document library, you need to create a document library with columns that are defined to have metadata extracted into them. Columns can be created either directly, or by adding an existing content type to the library.

Colligo Engage extracts the following metadata properties from emails:

Email Metadata	Default Column Name	Type
Attachment	Attachment	Yes/No
Bcc	Bcc	Text
Bcc-Address	Bcc-Address	Text
Bcc-Type	Bcc-Type	Text
Categories	Categories	Text
Cc	Cc	Text
Cc-Address	Cc-Address	Text
Cc-Type	Cc-Type	Text
Conversation	Conversation	Text
From	From	Text
From-Address	From-Address	Text
From-Type	From-Type	Text
Importance	Importance	Number
Received	Received	Date/Time
Received-UTC	Received-UTC	Date/Time
Sensitivity	Sensitivity	Number
Sent	Sent	Date/Time
Sent-UTC	Sent-UTC	Date/Time
Subject	Subject	Text
To	To	Text
To-Address	To-Address	Text
To-Type	To-Type	Text

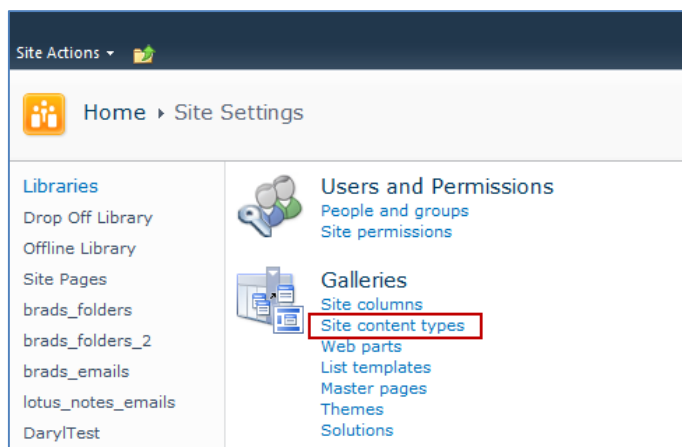
NOTE: Text fields can be Single Line of Text, or, Multiple Line of Text.

The **Default Column Name** refers to the display name of the SharePoint column

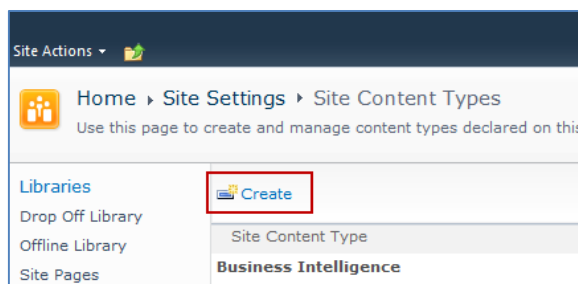
Adding a New Content Type to a Library

When creating an email content type, suitable SharePoint permissions are required. Typically, the email content type is created in the top level site within a site collection, allowing inheritance and customization in sub-sites.

1. In your document library, select **Site Actions** > **Site Settings**.
2. In the **Galleries** section, select **Site content types**:



3. In the **Site Content Types** page, click **Create**:



The **New Site Content Type** screen displays:

Site Actions ▾ Tessa MacKinnon ▾

Home ▸ Site Settings ▸ Site Content Types ▸ New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

Parent Content Type:

Description: Create a new document.

Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

☒ Existing group:

☐ New group:

OK Cancel

4. Enter the following information:
 - a. **Name and Description**
 - i. **Name:** enter a name for the content type
 - ii. **Description:** enter a description for the content type
 - iii. **Parent Content Type:** from the first drop-down list, select the parent content type group; in the second drop-down list, select the parent content type.
 - b. **Group:** choose if the content type is put into either:
 - i. **Existing group:** choose an existing content group from the drop-down menu
 - ii. **New group:** enter a name for a new content group
5. Click **OK**.
The content type is added.


Configuring Content Types

After adding a content type, you can add existing site columns as well as create new site columns.

1. On the new content type page, click either:
 - a. **Add from existing site columns**
 - b. **Add from new site column**

Add Columns to a Content Type:

2. Enter the following information:
 - a. **Select Columns:** choose a group from the **Select Columns from** drop-down menu
 - b. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type
3. Click **OK** to display the **New Site Column** screen:

Site Actions  Tessa MacKinnon

Home > Site Settings > New Site Column

Use this page to add a site column.

Home Arne Test Gregor Test Valentina Test Andrew Test Eric Test Eve Test Senior Management Braeden's Demo Site Susan Test
Jinks Kaczor Dyck LLC Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Henderson Special Column Test Bernard Test
BeeDub Test test_new_site TessaTest

Libraries


- Drop Off Library
- Offline Library
- Site Pages
- brads_folders
- brads_folders_2
- brads_emails
- lotus_notes_emails
- DarylTest
- DarylTest2
- Susan
- a new library
- Test
- Email Document
- Library_new
- New Library


Lists

- Calendar
- Case

Discussions

- Team Discussion

 Recycle Bin

 All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, €, £)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ Full HTML content with formatting and constraints for publishing
- ☐ Image with formatting and constraints for publishing
- ☐ Hyperlink with formatting and constraints for publishing
- ☐ Summary Links data
- ☐ Rich media data for publishing
- ☐ Managed Metadata

Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

- ☒ Existing group: Custom Columns
- ☐ New group:

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- ☐ Yes
- ☒ No

Maximum number of characters:

255

Default value:

- ☒ Text
- ☐ Calculated Value

Update List and Site Content Types

Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?

- ☒ Yes
- ☐ No

Column Validation

OK Cancel

4. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name
 - ii. Choose a type of information contained in the column
 - b. **Group:** choose if the column will belong to an existing group or a new one
 - c. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Maximum number of characters:** enter the maximum number of characters you want to have in this column

- iv. **Default Value:** choose **Text** or **Calculated Value**
- d. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type

After adding the columns to the Email Content Type you may choose to re-order the columns and/or make the columns hidden.

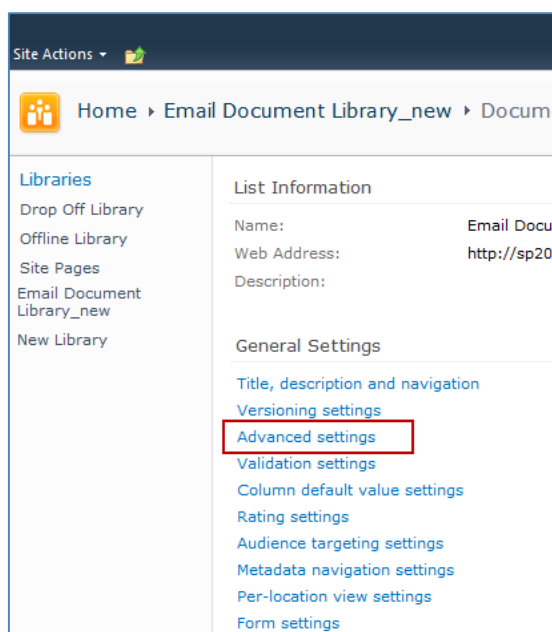
Hiding Columns

If you choose to make a column Hidden, the column is **not** displayed in the properties page of SharePoint, or Colligo Engage's default metadata editor dialog box.

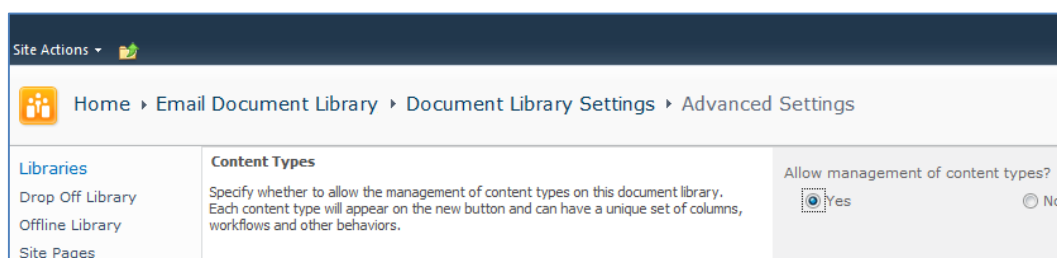
However, Colligo Engage still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

Adding a New Content Type to Library

1. In your document library, go to **Library Tools** > **Library** ribbon and click the **Library Settings** icon.
2. In the **General Settings** section, click the **Advanced settings** link:



3. In the **Advanced Settings** screen, ensure the **Allow management of content types** option is set to **Yes**:



4. Click **OK** to save the changes and return to the Library Settings screen.
5. On the **Document Library Settings** screen, scroll down to the **Content Types** section:

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Document	✓	
Add from existing site content types Change new button order and default content type		

- Click the **Add from existing site content types** link.
- In the **Add Content Types** screen, select a content type from the **Available Site Content Types** list, and click **Add**:

Site Actions ▾

Home ▸ Email Document Library_new ▸ Document Library Settings ▸ Add Content Types

Use this page to add new content types to this list.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:

All Groups

Available Site Content Types:

- Allow any content type *
- Audio
- Basic Page
- brads_custom_ct
- Document Set
- Dublin Core Columns
- Email**
- Email_new
- Form
- Image
- Link to a Document

Description: None

Group: Custom Content Types

Add >

< Remove

Content types to add:

OK **Cancel**

- Click **OK** to return to the **Document Library Settings** screen.
- The new content type displays in the **Content Types** section:

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Email	✓	✓
Document	✓	
Add from existing site content types Change new button order and default content type		

Creating a Library Without Content Types

If you do not wish to use content types in your SharePoint library, you can add columns directly to the library to enable email metadata mapping. See **Enabling Metadata Extraction** for the metadata fields and default column names.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Library Settings** icon.
2. In the **Document Library Settings** screen, scroll down to the **Columns** section and click **Create Column**:

Column (click to edit)	Type	Required
Title	Single line of text	
Attachment	Yes/No	
Checked Out To	Person or Group	

[Create column](#)
[Add from existing site columns](#)
[Column ordering](#)
[Indexed columns](#)

The **Create Column** screen displays:

Site Actions ▾

Home > Email Document Library_new > Document Library Settings > Create Column

Use this page to add a column to this document library.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Discussions

- Team Discussion

Recycle Bin

- All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

Maximum number of characters:

255

Default value:

☒ Text ☐ Calculated Value

☒ Add to default view

[Column Validation](#)

OK Cancel

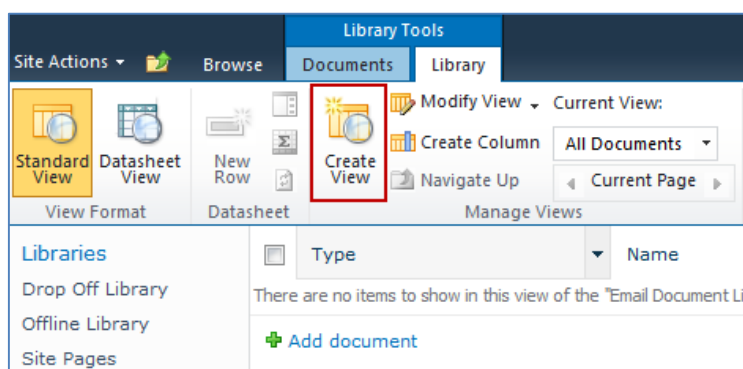
3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name

- ii. Choose a type of information contained in the column
- b. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Enforce unique values:** choose Yes if you want this column to have a unique value
 - iv. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
 - v. **Default Value:** choose **Text** or **Calculated Value**
 - vi. **Add to default view:** check this box if you want this column to display in the default view
4. Click **OK**.
The new column displays in the **Columns** section in your **Document Library Settings** list.

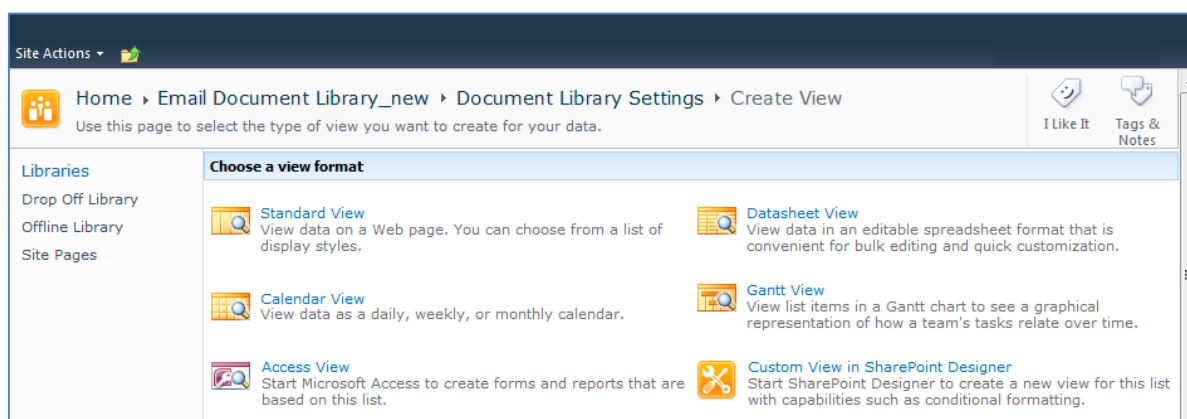
Creating An Email View

After you have defined your content type and added it to your library, it is recommended that you create an email view.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Create View** icon:



The **Create View** screen displays:



2. Click the **Standard View** link.
The configuration options for the standard view display:

Site Actions ▾

Home ▸ Email Document Library_new ▸ Document Library Settings ▸ Create View

Use this page to create a view of this document library.

I Like It Tags & Notes

OK Cancel

Libraries

Drop Off Library
Offline Library
Site Pages
Email Document Library_new
New Library

Lists

Calendar
Case

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

☐ Make this the default view
(Applies to public views only)

Audience

Select the option that represents the intended audience for this view.

View Audience:

☐ Create a Personal View
Personal views are intended for your use only.

☒ Create a Public View
Public views can be visited by anyone using the site.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1 ▾
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2 ▾
<input checked="" type="checkbox"/>	Modified	3 ▾
<input checked="" type="checkbox"/>	Modified By	4 ▾

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

☒ Show items in ascending order
(A, B, C, or 1, 2, 3)

☐ Show items in descending order
(C, B, A, or 3, 2, 1)

Then sort by the column:

☒ Show items in ascending order
(A, B, C, or 1, 2, 3)

☐ Show items in descending order
(C, B, A, or 3, 2, 1)

☐ Sort only by specified criteria (folders may not appear before items).

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

☒ Show all items in this view

☐ Show items only when the following is true:

Show the items when column

is equal to ▾

☐ And ☒ Or

When column

is equal to ▾

[Show More Columns...](#)

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

☒ Enable this view for mobile access
(Applies to public views only)

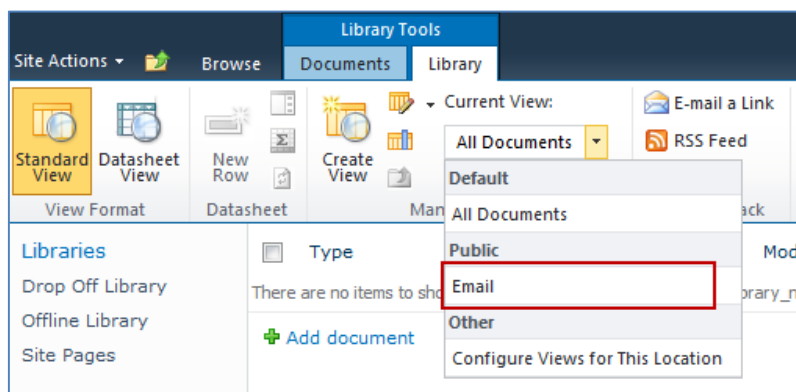
☐ Make this view the default view for mobile access
(Applies to public views only)

Number of items to display in list view web part for this view:
3

Field to display in mobile list simple view:

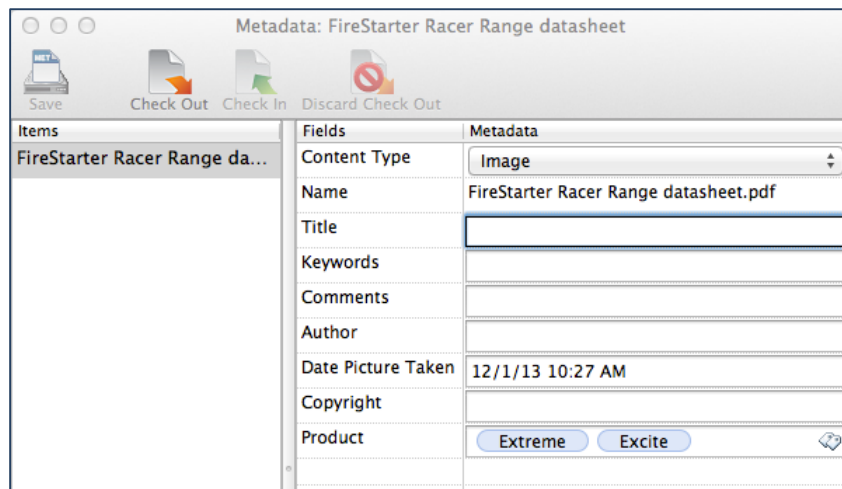
OK Cancel

3. Enter the **Name** and **Audience** for your view.
4. Click **OK**. You can now select this view from your **Current View** list in your **Library** ribbon:



Validating Metadata Extraction

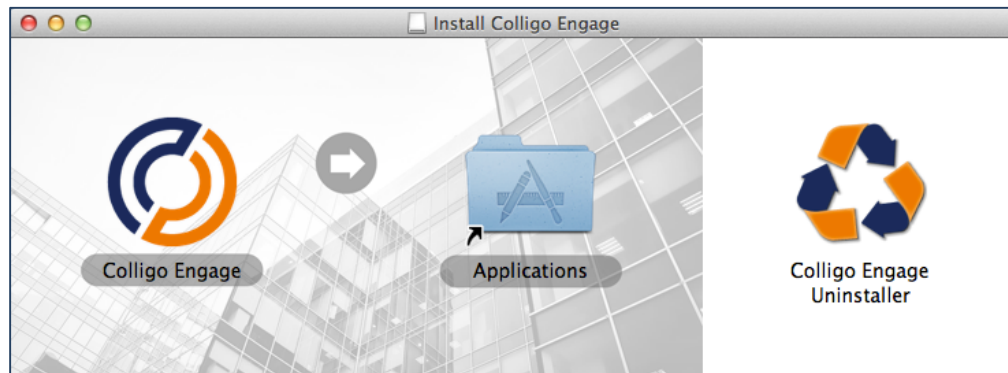
To validate that your metadata is being extracted correctly, drag-and-drop an email into a folder, and check that the correct metadata is being displayed and extracted:



Uninstalling Colligo Engage

To uninstall Colligo Engage:

1. Double-click the .dmg file to open:



2. Double-click **Colligo Engage Uninstaller**.
The application is removed from your machine.