

# Colligo Briefcase for Mac

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User Guide



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## About this guide

This document provides guidance for the installation of Colligo Briefcase for Mac, hereafter referred to as Colligo Briefcase.

### Audience

This guide is intended for use by users of Colligo Briefcase.

### Related Publications

The following documents also provide useful information and are available in the Documentation section of the Colligo Support Portal:

- Briefcase for Mac Release Notes
- Briefcase for Mac Installation Guide
- Briefcase for Mac Administrator Guide

### Colligo Technical Support

If you have a problem with your Colligo software, following are the available support options:

1. Colligo Knowledge Base: <http://www.colligo.com/support/knowledgebase>
2. Colligo Support Community: <http://www.colligo.com/support/community>
  - This community is free and open to anyone
3. Colligo Online Support: <https://www.colligo.com/support/request>
  - Submit a ticket online if you have current M&S or an active subscription.

## Introduction

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

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

## Key Features

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

## Storage Limits

Storage Limits are available as of version 7.5 of Colligo Briefcase and are configured in Colligo Console at the group level and allows administrators to set the maximum local storage allowed.

Storage Limits apply only to items added locally – they do not apply to Console pushed items, which appear greyed out in the **Content to Sync** panel.

When enabled, users will see a **Calculating Size...** message when a large item is selected in the **Content to Sync** panel.

## Exceeding the Storage Limit

When the storage limit is exceeded, users will see a message indicating that it has been exceeded. Uploads will continue, but downloads will be limited.

The storage limit can be exceeded for many reasons, including when users select more content to sync than allowed, when a remotely added file is pushed down, or when Storage Limits were reduced and previously downloaded content exceeds the new limit

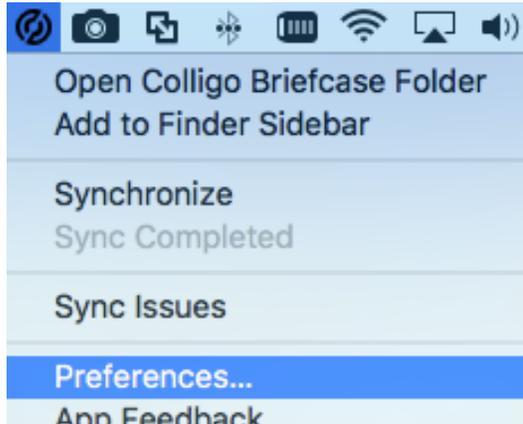
Users should adjust the Selective Sync settings to resume sync down from SharePoint.

## Configuration

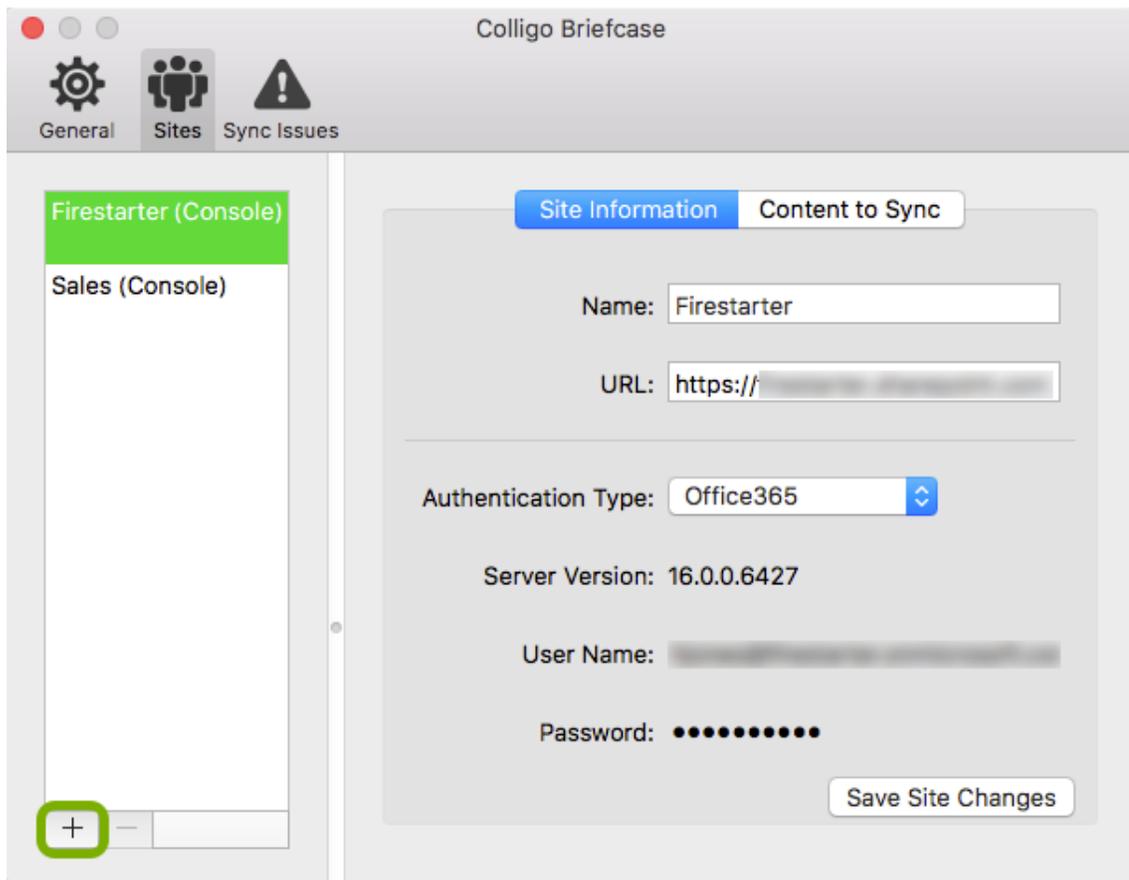
Colligo Briefcase lets you add, edit, sync, and remove SharePoint sites.

### Adding a Site

1. In the menu bar, click the Colligo icon  and choose Preferences...:



2. Click the  icon at the bottom of the site list to add a site:



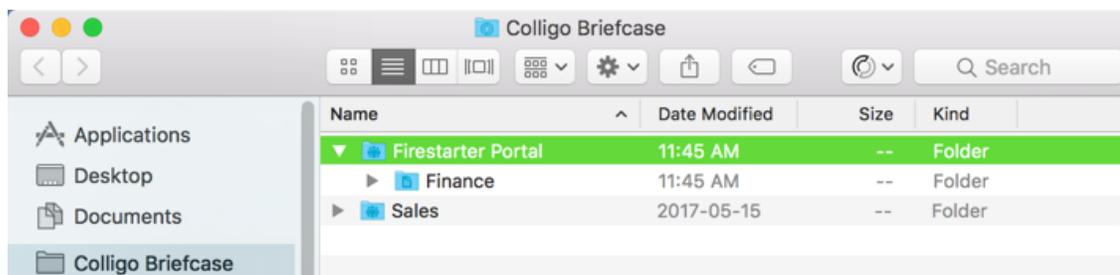
- The **Connect to Site** dialog displays. Enter your URL and click **Continue**. It is recommended that you load the SharePoint site in your browser and then copy and paste the URL into the **Connect to Site** dialog.
- You will next be prompted to authenticate with SharePoint. The **Username** and **Password** fields may be pre-filled. Update the **Username** if needed, re-enter your **Password**, and click **Continue** to proceed.

The screenshot shows the 'Connect to Site' dialog box. At the top left is a blue folder icon with a person silhouette. Below it is a text field containing a URL. The 'Authentication type' is set to 'Office365' in a dropdown menu. There are two text input fields: 'Username' and 'Password'. The 'Password' field is masked with black dots. Below these fields is another text field starting with 'https://'. At the bottom, there are three buttons: 'Cancel', 'Go Back', and 'Continue'.

- Site content will be retrieved and the **Content to Sync** dialog displays. Select the content you want to sync to your local machine. As you select content, the size indicator will increase. If Storage Limits have been enabled by your Colligo Administrator you will also see the total local storage you have available.

The screenshot shows the 'Content to Sync' dialog box. At the top, it says 'Content to Sync' in bold. Below that is 'Site Nickname:'. There is a checkbox labeled 'Select All'. A list of content items is shown, each with a right-pointing triangle and a checkbox. The first item, 'Finance', is selected. The other items are 'Form Templates', 'IT', 'Site Assets', 'Site Pages', 'Style Library', 'Marketing - site', and 'Sales - site'. Below the list, it says '2.57MB selected'. At the bottom, there are three buttons: 'Cancel', 'Go Back', and 'Finish'.

- Once you have selected the content, click **Finish**. If you go over the storage limit when selecting content, the **Finish** button will remain grayed out. Unselect items until the total is below the storage limit.
- The first sync will take place and the content you selected displays in the Finder:



Content will sync on a regular basis with a default Sync Interval of 15 minutes. This frequency can be adjusted from the General Preferences.

## Deleting a Site

You can only delete user added sites. You can't delete a Console pushed site.

To delete a site:

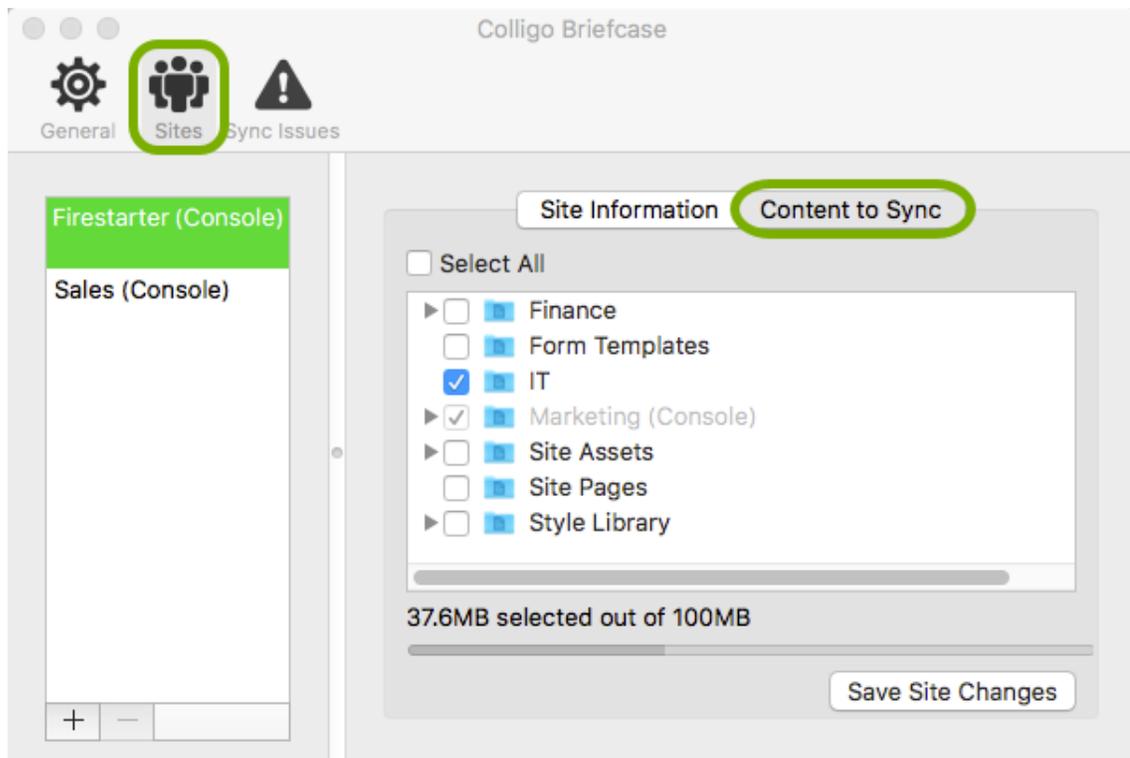
- In the menu bar, click the Colligo icon  and choose **Preferences...** from the drop-down menu.
- If needed, click on **Sites** to bring up the Sites list.
- Select the site you want to delete
- Click the  icon at the bottom of the list.
- A confirmation popup will appear. Click **Continue** to proceed with the removal of the site.
- The site is removed from the list and all downloaded content is removed from your local machine.

**Note:** You will lose any content that has not been synced. It is recommended that you manually sync your content prior to deleting a site.

## Editing Site Content

After you have added a site and performed the initial sync of selected content, you can change the content that is synced to your machine,

1. In the menu bar, click the Colligo icon  and choose **Preferences...**
2. If needed, click on **Sites** to bring up the Sites list.
3. Select the site you want to edit and click the **Content to Sync** tab:



4. Use the **Select All** checkbox, or the individual checkboxes to select or unselect content to sync. As you select content, the size indicator will increase. If you go over the storage limit when selecting content, the **Save Site Changes** button will remain grayed out. Unselect items until the total is below the storage limit.

In the example above, Storage Limits have been enabled, so the total local storage available is also displayed. Content pushed from Colligo Console (in this example, the **Marketing** library), does not count towards the storage limit. The text label **(Console)** indicates that it was pushed from Console.

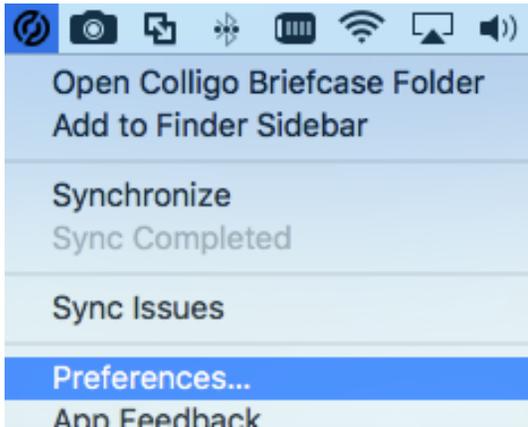
5. Click **Save Site Changes** when done. A success message will be displayed.
6. Synchronization should begin immediately. You may also click the Colligo icon  in the menu bar and choose **Synchronize**.
7. The change in content is reflected in the Finder view.

## General Preferences

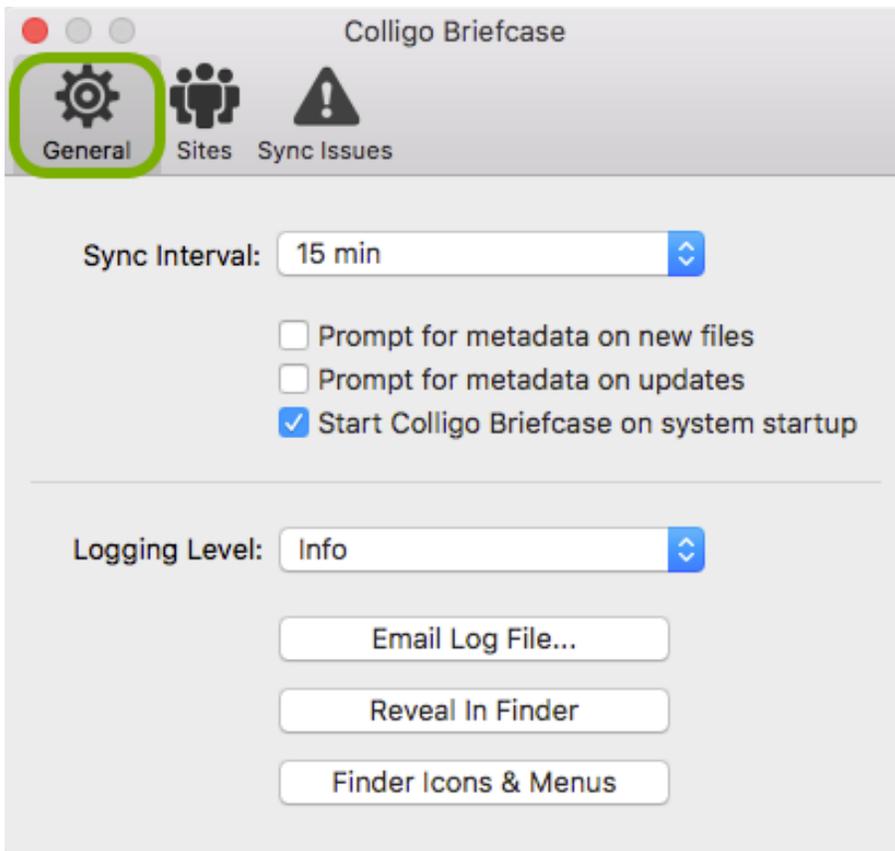
Colligo Briefcase has some preferences which can be specified by the user.

To open the General Preferences:

1. In the menu bar, click the Colligo icon  and choose Preferences...:



2. Click on the General tab:



## Sync Preferences

There are four options available from the **Sync Interval** drop-down:

- **Manual** (If you choose this option, synchronization will only take place when you click the Colligo icon  in the menu bar and choose **Synchronize**.)
- 15 min (default)
- 30 min
- 1 hour

There are three options available, as check boxes:

- **Prompt for metadata on new files** (default: unchecked)
- **Prompt for metadata on updates** (default: unchecked)
- **Start Colligo Briefcase on system startup** (default: checked)

## Logging Preferences

There are five options available from the **Logging Level** drop-down:

- None
- Errors
- Warning
- Info (default)
- Verbose

The three buttons at the bottom work as follows:

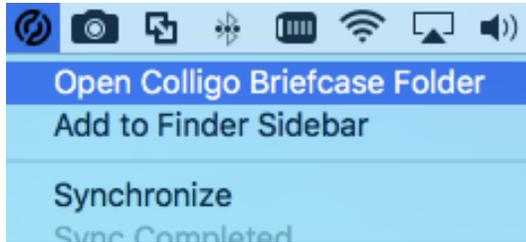
**Email Log File...:** this will open your default mail application with a new email containing the Colligo Briefcase Log File.

**Reveal in Finder:** this will open Finder to the location of your saved log file

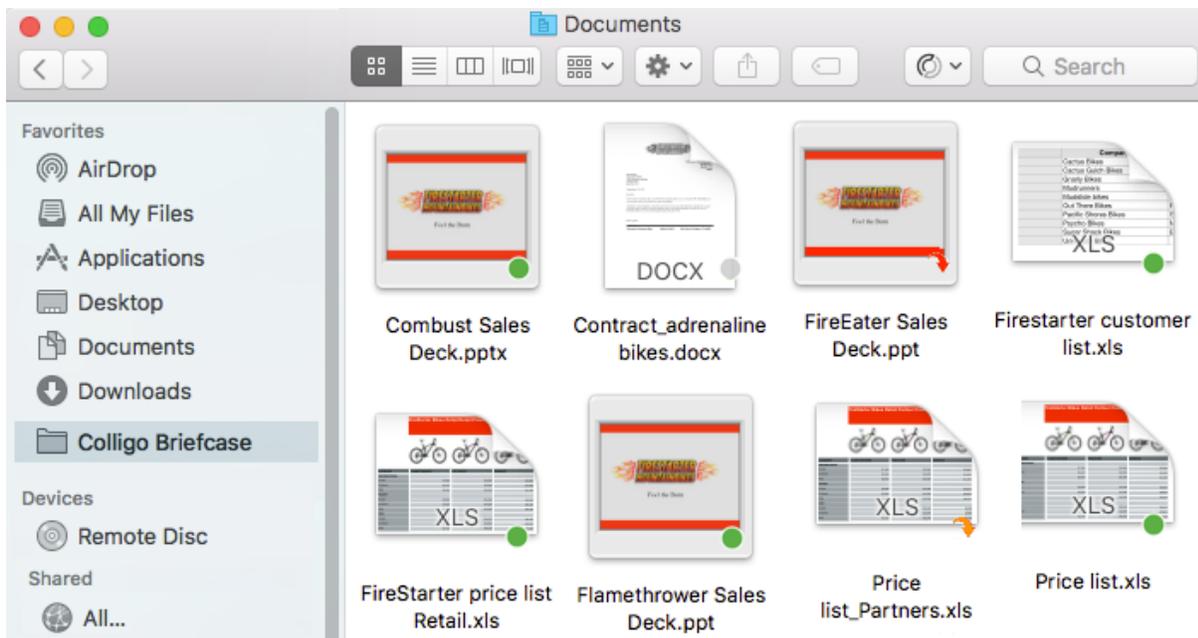
**Finder Icons & Menus:** if your status badges are not displaying, or your contextual menus are not appearing, click this button to re-enable the Finder extension. If it is already enabled, you will need to toggle the extension to correct the issue.

## Viewing Site Content

Colligo Briefcase integrates with Finder. To view SharePoint content, click the Colligo icon  in the menu bar and choose **Open Colligo Briefcase Folder** from the drop-down menu:



The Finder view will open to the Colligo Briefcase location:



All items will have a status badge to indicate one of the following states:

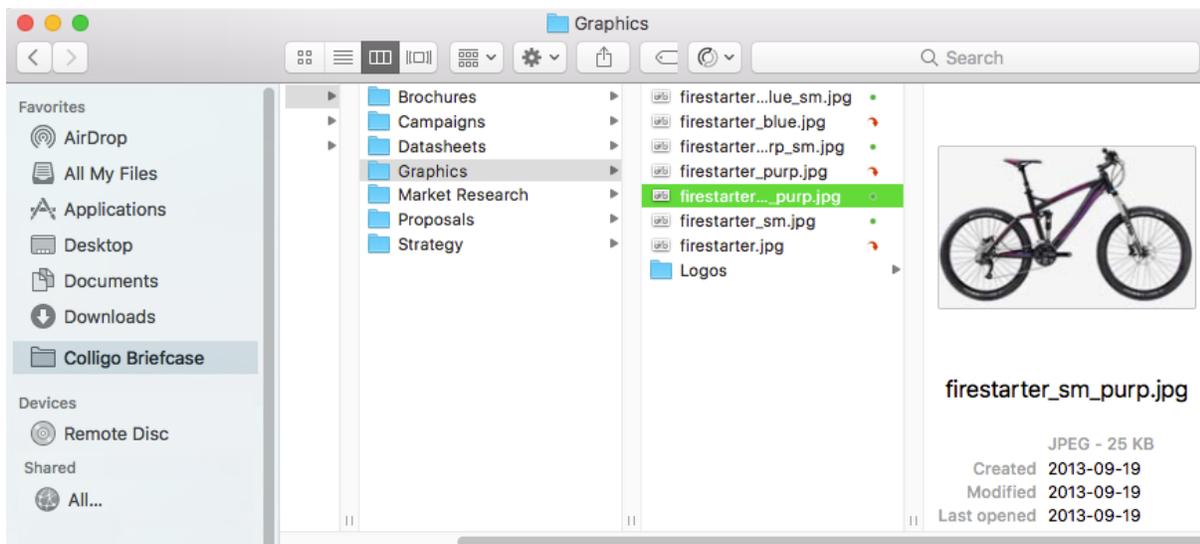
-  : Synced to your local machine
-  : Pending synchronization: your change has not yet been synced to SharePoint
-  : Checked out to you
-  : Checked out to another user

## Viewing Items

To view an item, double-click it to launch it in its own screen:



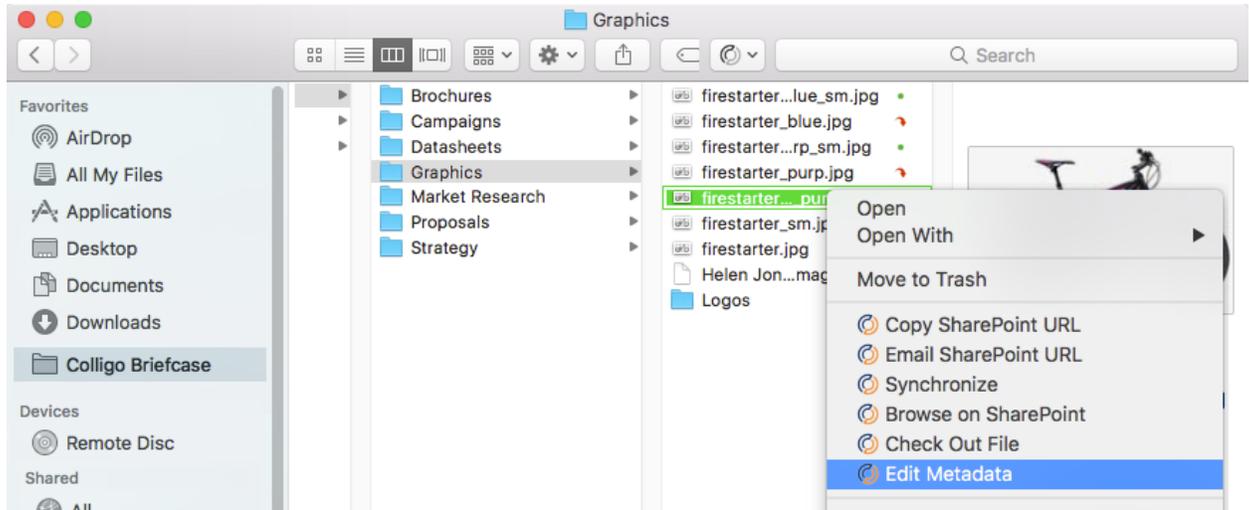
You can also preview the file in Finder by selecting it in the list view:



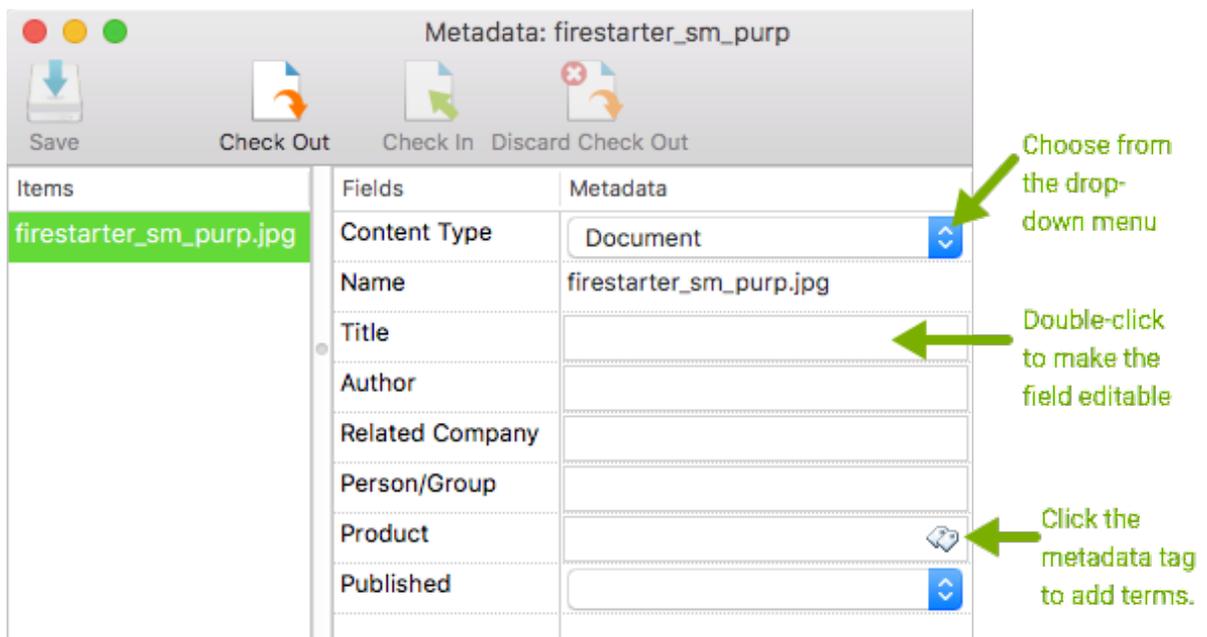
## Viewing and Editing Item Metadata

To view or edit an item's metadata:

1. Right-click it and select **Edit Metadata**:



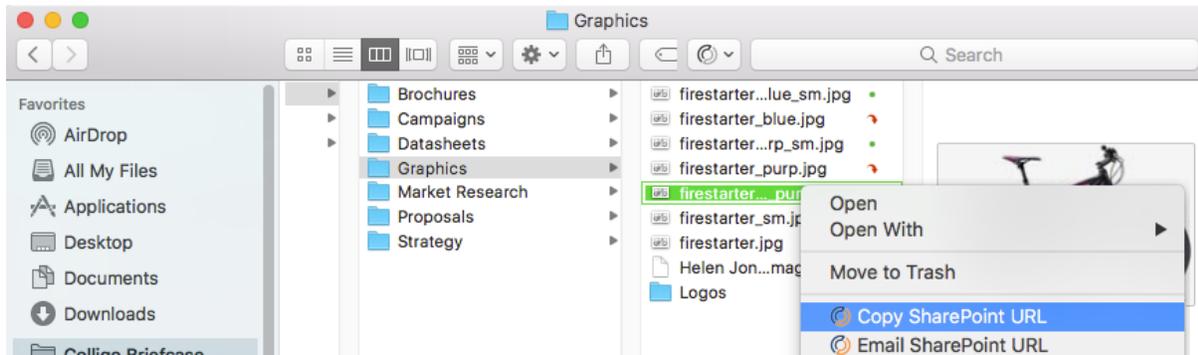
2. The metadata displays in a new window. Required fields display in bold, and must be filled in before the metadata editor can be closed.



3. View and edit metadata as desired. How you edit metadata depends on the type of field it is. If the field is protected, there will be no result from a double-click.
4. Click **Save** once you have completed editing metadata.

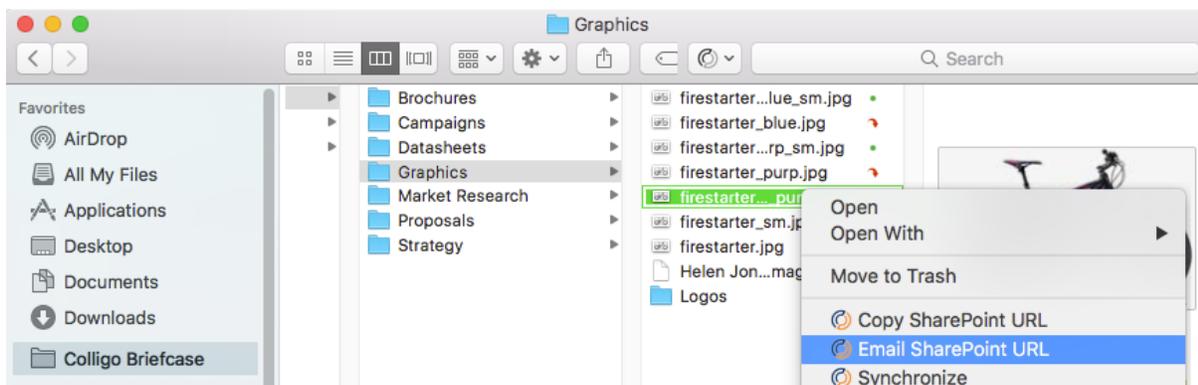
## Copying a SharePoint URL

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



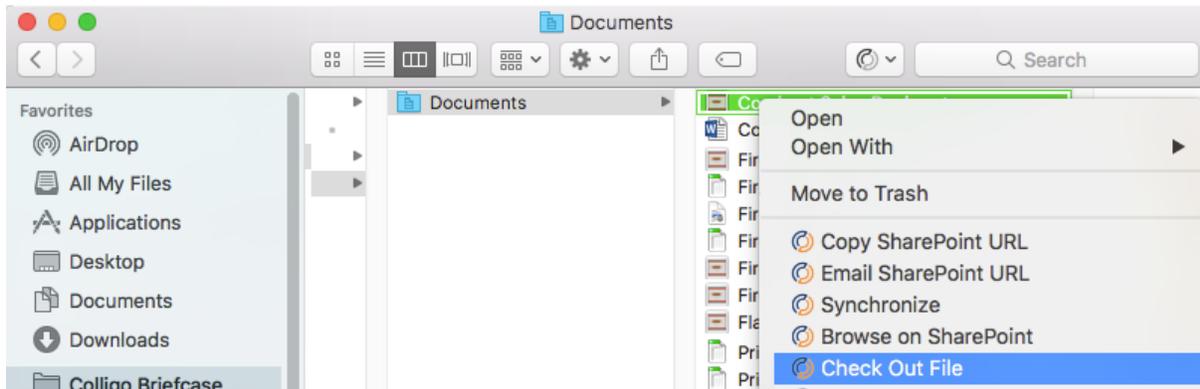
## Emailing a SharePoint URL

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



## Checking an Item Out or In

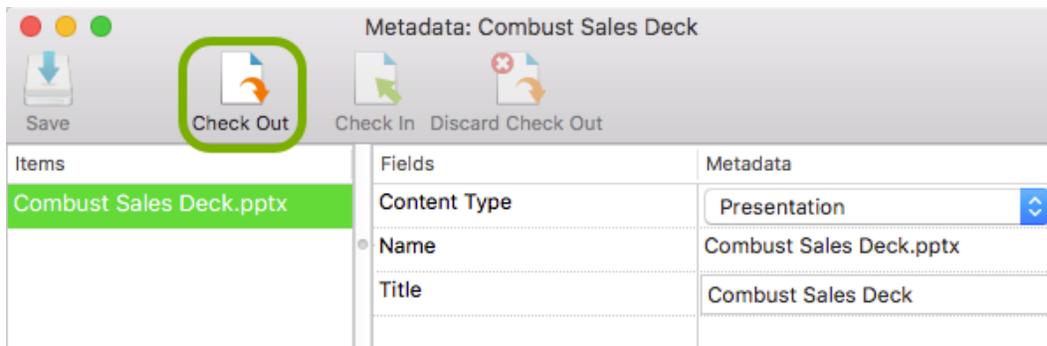
You can check an item out by right-clicking it and selecting **Check Out File**:



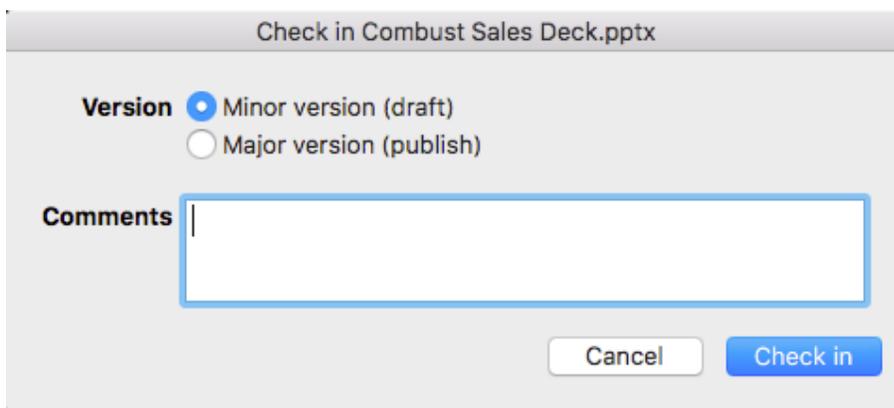
When an item is checked out to you, an orange arrow is added to the item's icon.

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

You can also check items in and out from the metadata screen:



If your library has versioning enabled, when you check an item back in, the following screen displays:

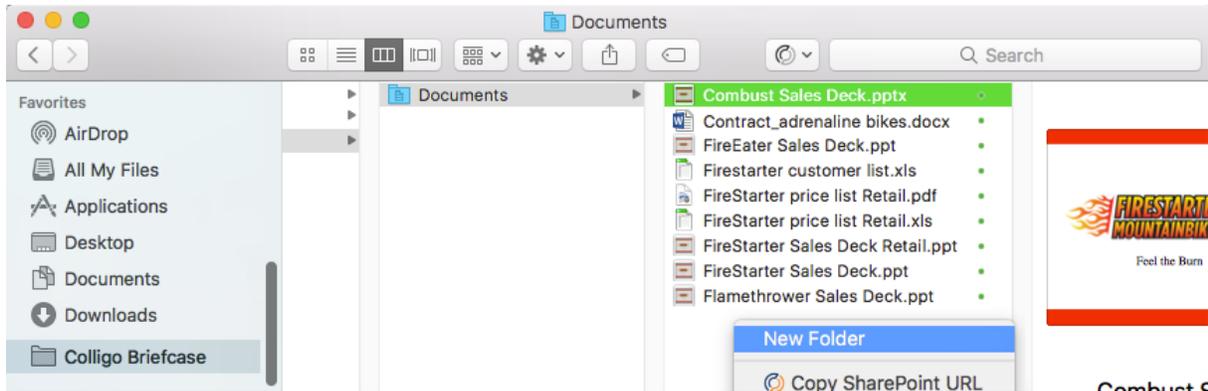


Select a version, enter any relevant comments, and click **Check in**.

## Adding and Editing Site Content

### Creating a New Folder

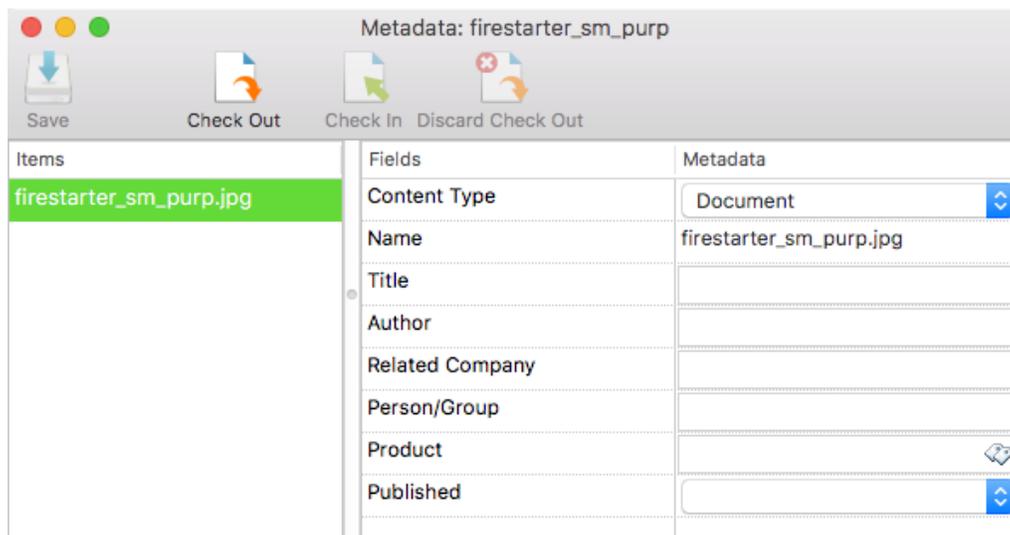
To create a new folder in a library, right-click and select **New Folder** from the contextual menu:



### Adding Files

To add content to your SharePoint document libraries you can move content or you can copy it. When dragging and dropping a file to the Briefcase Folder, the default behavior will be **Move** (previously **Copy**). Hold down the **option** key while dragging to copy the file.

1. Move or copy one or more items into the library.
2. If the **General Preferences** are set to prompt for metadata, the metadata prompt displays:



3. Edit the fields as desired. Required fields display in bold, and must be filled in before the metadata editor can be closed.
4. Click **Save**. If you are connected to your SharePoint network, the item(s) is/are synced to the SharePoint site.

## Adding Emails

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

1. Drag-and-drop your email to your preferred SharePoint location.
2. If the **General Preferences** are set to prompt for metadata, the metadata prompt displays.
3. Edit the fields as desired and close the window. Required fields display in bold, and must be filled in before the metadata editor can be closed.

The item is uploaded to SharePoint on the next sync.

## Moving Items Within Libraries

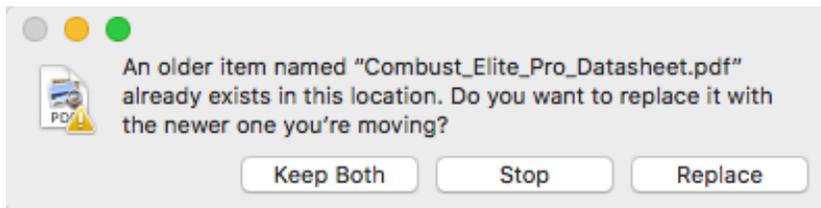
To move an item from one library to another:

1. Drag-and-drop the item into the preferred location.
2. If the **General Preferences** are set to prompt for metadata, the metadata prompt displays.
3. Edit the fields as desired and close the window. Required fields display in bold, and must be filled in before the metadata editor can be closed.

The item is uploaded to SharePoint on the next sync.

## Overwriting Documents

If you drop a document into a library that has an existing document with the same name, a prompt similar to the one below displays:

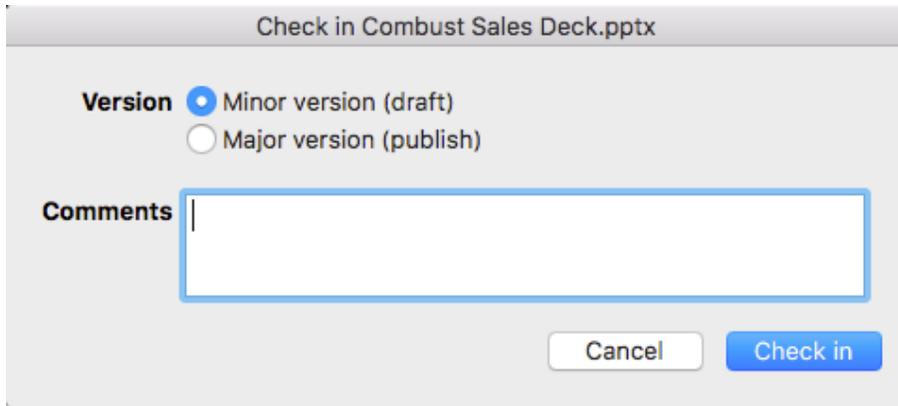


If you choose **Keep Both**, the new file is appended with a number at the end of the name and saved into the directory. If you choose **Replace**, the new file overwrites the existing one.

If the **General Preferences** are set to prompt for metadata, the metadata prompt displays (existing metadata). Edit the fields as desired and click **Save**.

## Adding a new Version

If you have a library with versioning enabled, anytime you open, edit, and save an existing item back to its location, the following dialog displays:



Select a version, enter any relevant comments, and click **Check in**.

## Editing Items

To edit an item:

1. Double-click it to launch it in its native application.
2. Make your edits and click **Save**.

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

## Renaming Items

To rename an item:

1. Click the file name to make it editable.
2. Make edits as necessary.

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

## Deleting Items

To delete an item, you have two options:

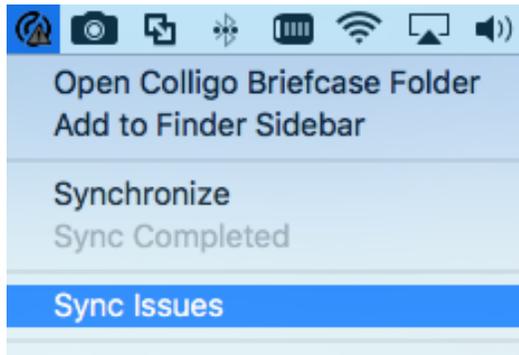
- Right-click and item and choose **Move to Trash** from the contextual menu.
- Drag the item into the Recycle bin.

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

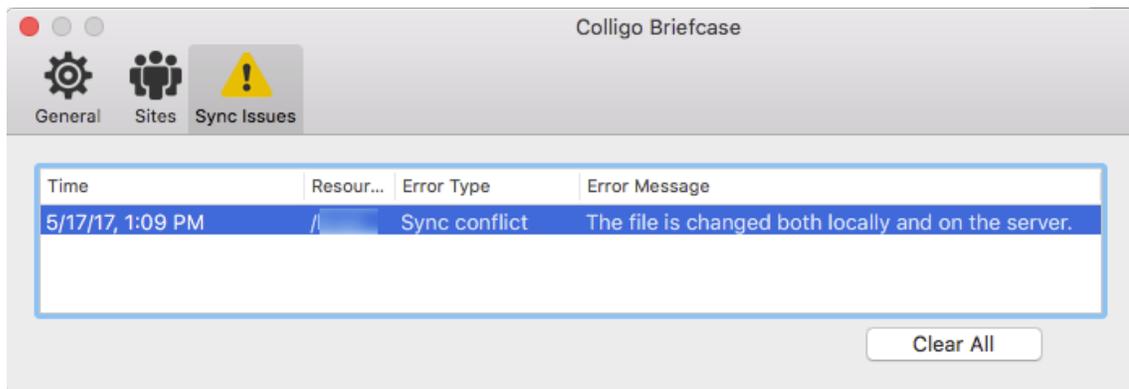
## Resolving Conflicts and Managing Sync Issues

If there is a conflict between the item you have on your local machine and the item on SharePoint, you can resolve it in the **Sync Issues** panel.

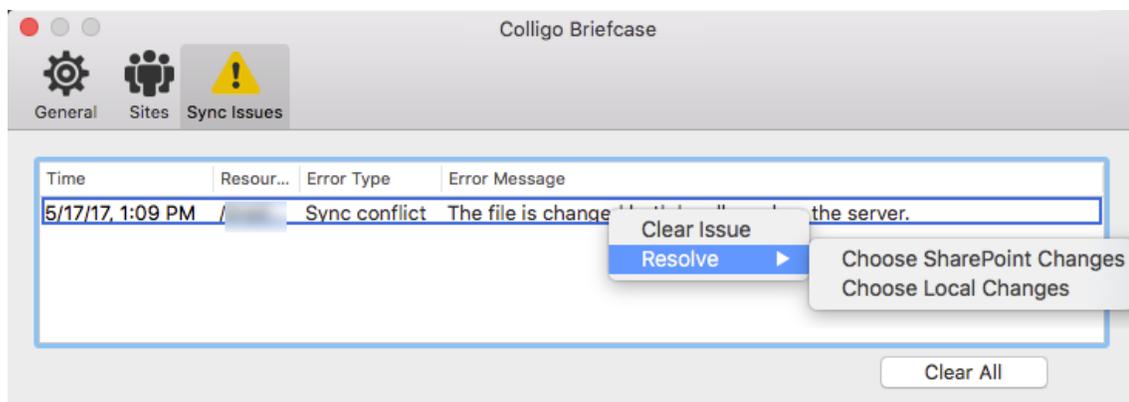
1. In the menu bar, click the Colligo icon  and choose **Sync Issues**:



2. The Sync Issues panel displays:



3. Right-click on a sync issue item and choose if you want to keep the local version or the SharePoint version:



Any additional sync issues can be cleared by clicking **Clear All**.