iOS App User Guide for iPad

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Introduction

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

Colligo Engage lets you securely store, sync, view, edit, and find SharePoint content on your iPad, iPhone or iPod Touch. Access and share files, lists, images, documents and emails. Synchronize SharePoint content to your iPad, iPhone or iPod Touch automatically, for instant access, even when offline.

Devices Supported

NOTE: All devices require iOS 7.0 or higher

- iPad (2nd generation and above) and iPad Mini
- iPhone (4 and above)
- iPod Touch (4th generation)

SharePoint Platforms Supported

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

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Overview

This user guide explains how to use Colligo Engage on iPad. View the user guide in Colligo Engage on an iPhone or iPod for instruction on how to use Colligo Engage on those devices.

Installing the Colligo Engage iOS Application

How the Colligo Engage iOS app is installed depends if you're organization is using the Colligo Engage Console or not. If you are using the Colligo Engage Console you can install the latest version from the iTunes App Store. If you are not using the Colligo Engage Console the application will be available from your IT administrator.

Setting Language Preference

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

To set the language for the app:

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

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Signing in to the Colligo Engage Console

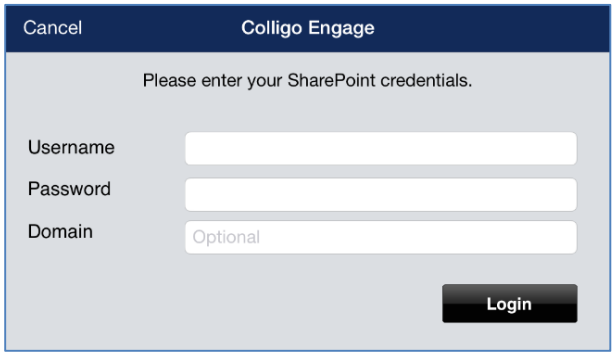
If you are using the Colligo Engage Console the first screen you will see requires your Colligo Engage credentials to access the application.

Tap **Forgot Password** if you are unable to login, enter your email address and a temporary password will be sent to your email address if you have a valid Colligo Engage account.

You will not be prompted again for your Colligo Engage credentials unless you change your password or your account is deactivated on the Colligo Engage console by your administrator.

Receiving Application Configuration from the Colligo Engage Console

If your administrator has specified specific any policies, sites, lists or libraries to synchronize these will be immediately configured for you with the iOS app. You will be prompted for your SharePoint credentials to use with these sites. The app will attempt to use the provided credentials for all sites pushed to you from the Colligo Engage Console. You will be prompted for additional credentials if any of the pushed sites require them.



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Managing SharePoint Sites

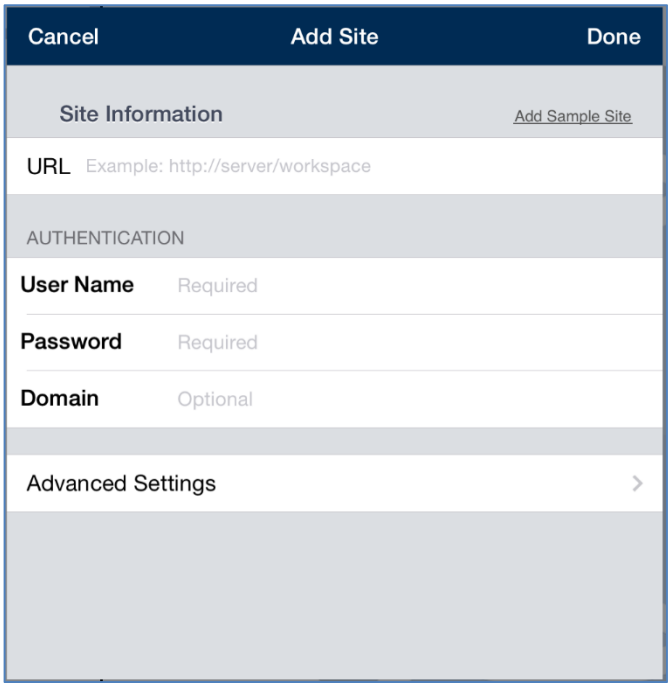
Colligo Engage lets you add, edit, and remove SharePoint sites.

Using the Colligo Sample Site

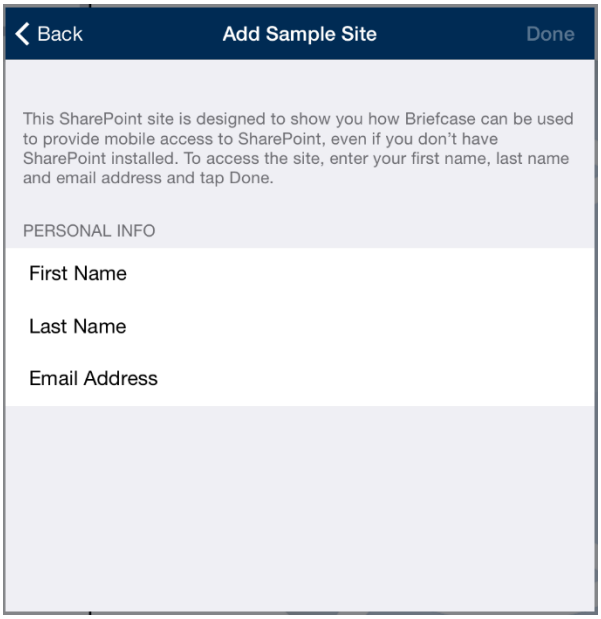
Colligo has provided a sample site that you can add when you first launch the product. This site provides you with read-only content that allows you to see how Colligo Engage works, even if you don't have your own SharePoint site to add.

To launch the sample site:

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



The **Add Sample Site** dialog displays:



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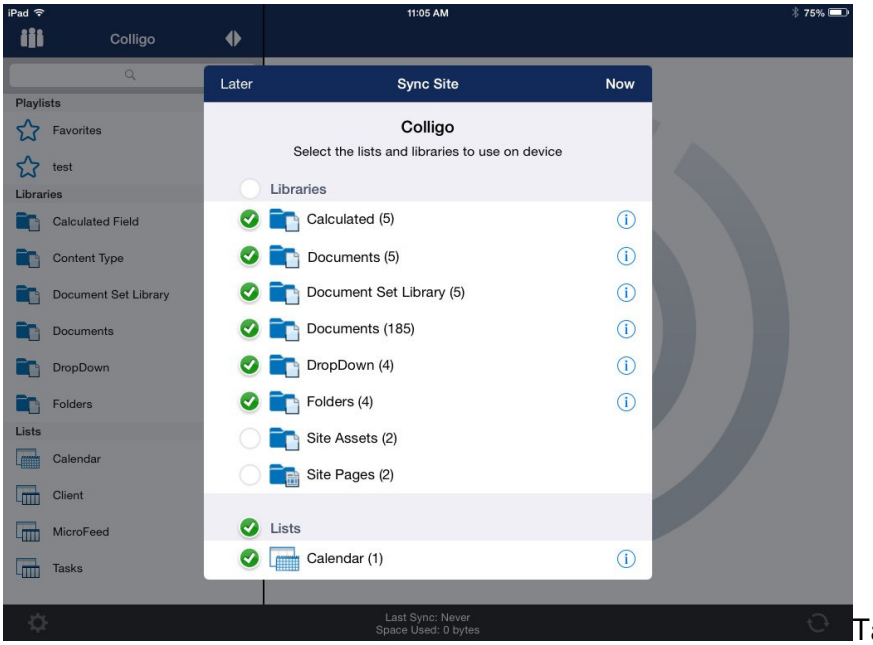
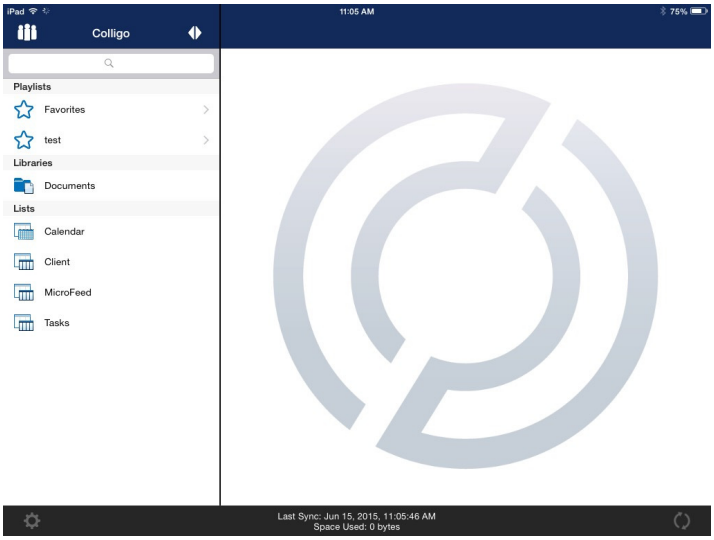
2. In the dialog, enter your **First Name**, **Last Name**, and **Email Address**.
3. Tap **Done**.

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



4. Tap to select or deselect a list or library that you want to sync. Tap to select or deselect a list or library that you want to sync. Tap the checkmark at the top of each list to select all or deselect all.
   The following lists are disabled by default and need to be enabled manually:
   a. **Form Templates**
   b. **Site Assets**
   c. **Site Pages**
   d. **Style Library**
5. Choose **Later** or **Now**. If you choose the **Later** option, you can revisit this dialog and set different sync options.

   The site syncs and the lists and libraries display in the left pane:



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

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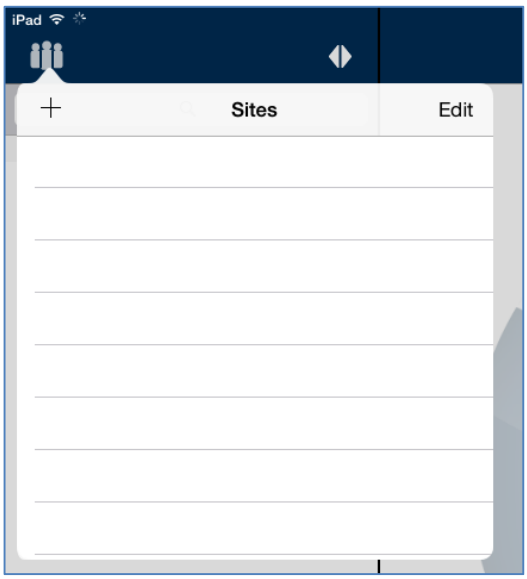
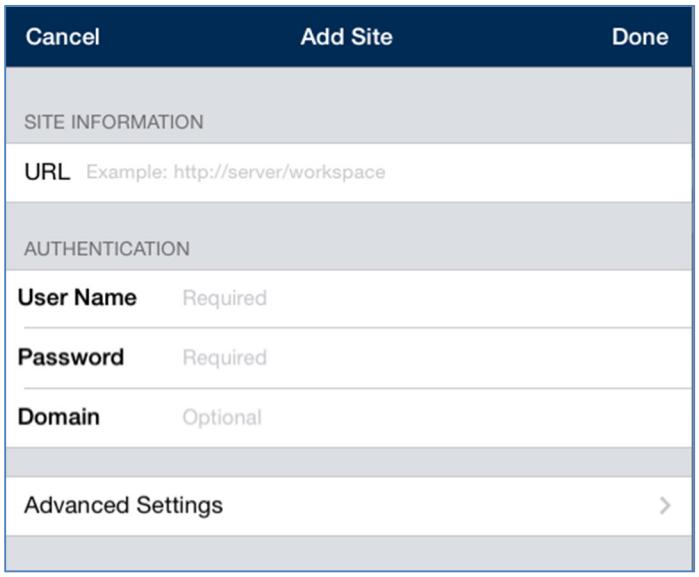
Adding a Site

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



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



3. In **URL** field, enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address. This field validates the URL you enter, so you cannot enter an incomplete or unqualified URL.
   NOTE: the format of the URL must match the SharePoint server URL.
   If you require a fully qualified URL, you may need to define alternate access mappings for it.
4. In the **Authentication** section, enter your **User Name**, **Password**, and **Domain** for the site.
   NOTE: the Domain field displays only if needed.
5. Tap **Advanced Settings** to configure the following options:

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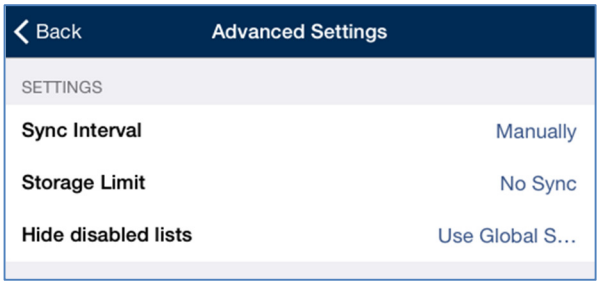

a. Tap the **Sync Interval** field and choose one of the following options to determine the frequency of the sync interval:
   i. Manually
   ii. Every Open
   iii. 15 min
   iv. 30 min
   v. Hourly
   vi. Daily
b. Tap the **Storage Limit** field and choose one of the following options:
   i. No Sync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

   NOTE: this setting is different from the **Global storage limit** that applies to the entire application (see **Managing Settings**). The **Global storage limit** setting overrides any individual site storage limits.
c. Tap **Hide disabled lists** and choose one of the following options:
   i. If you choose **Use Global Setting**, the setting you have chosen for this item in the **Colligo Engage Settings** screen applies to this site; see **Managing Application Settings**.
   ii. If you choose **Yes,** you are hiding the disabled lists for this specific site.
   iii. If you choose **No,** you are displaying the disabled lists for this specific site.

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

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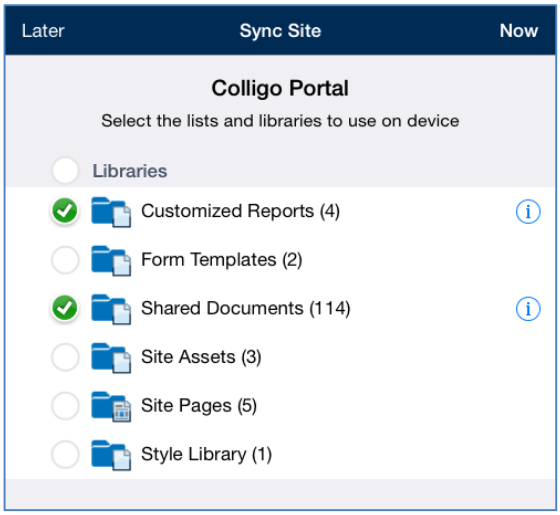
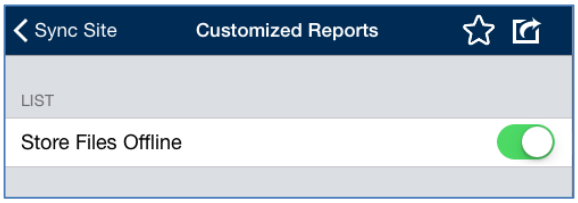


8. Tap to select or deselect a list or library that you want to sync. Tap the checkmark at the top of each list to select all or deselect all.
   The following lists are disabled by default and need to be enabled manually:
   a. Form Templates
   b. Site Assets
   c. Site Pages
   d. Style Library
9. Tap the ⓘ icon beside a selected list or library to display the following screen:



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

Syncing a Site

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

To sync a site, tap the icon in the bottom right corner:

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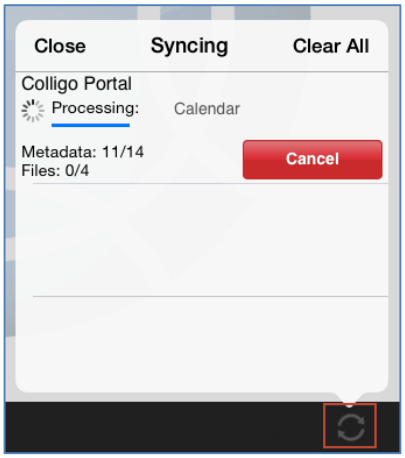


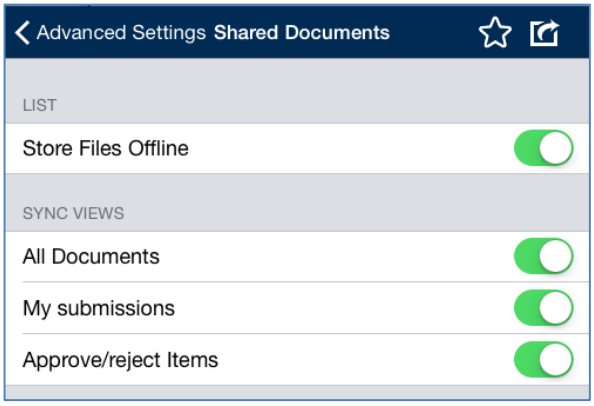
If this is the first time a site has been synced, all information is downloaded. The app downloads all data until it reaches the limit you set in the **Storage Limit** option (see **Adding a Site**)

Editing a Site

To access and edit the information for a SharePoint site:

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

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



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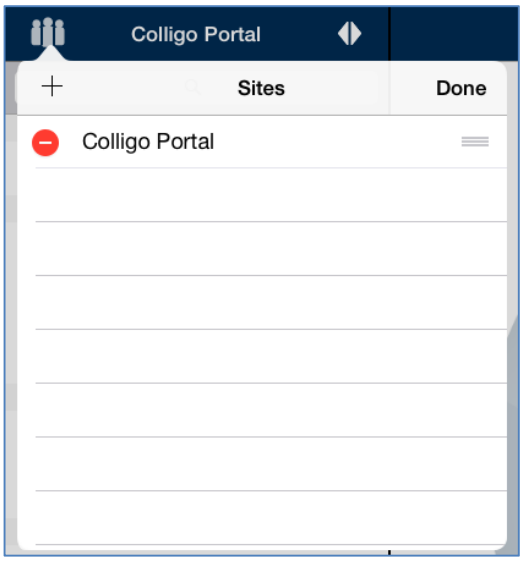
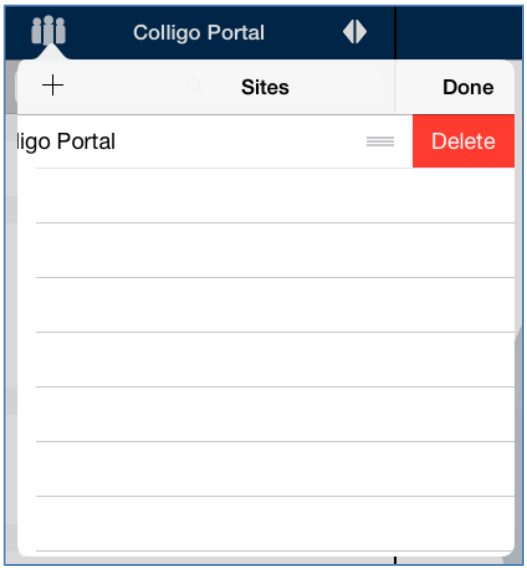
Deleting a Site

To delete a site:

1. Tap the sites icon to display your list of sites:
2. Tap **Edit**.
   The Sites display with a red icon beside each top-level site.



3. Tap the red circle icon beside the site you want to delete.
   The **Delete** button displays beside the site name:



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

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Reordering Sites

To reorder your list of sites:

1. Tap the sites icon to display your list of sites.
2. Tap **Edit**.
3. Tap and drag on the lines to the right of the site name and move the site up or down as preferred. You can reorder top-level sites or sub-sites within a site.

Displaying a Site

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

Viewing and Previewing Items

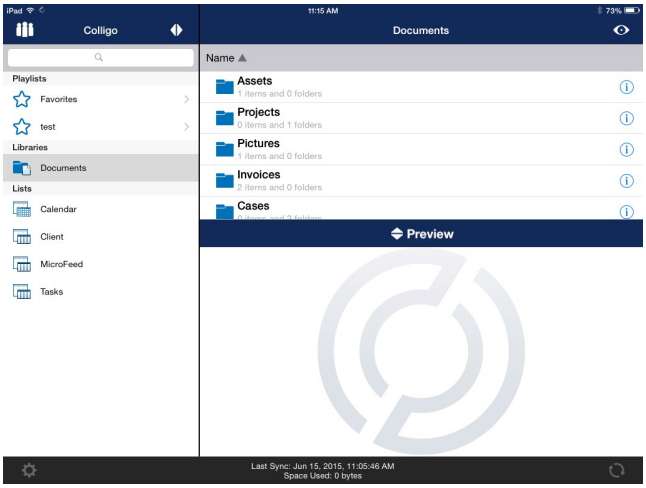
1. After you add a SharePoint site, the subsites, libraries, and lists in that site display in the left column of the screen. The bracketed number beside each library or list indicates the number of items in that location.
2. To display a subsite, tap the name in the **Subsites** list.
3. The libraries and lists for that subsite display and you can choose which ones you want to be synced.
4. Tap on any library or list and the items contained in the library or list display in the right column.

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

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

   If the item has a *grey* circle icon, it means the item is not going to be synced for one of the following reasons:
   - Global storage limit is set to No Sync
   - Site storage limit is set to No Sync
   - List set to not store files offline
   - File set to not be stored offline

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



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

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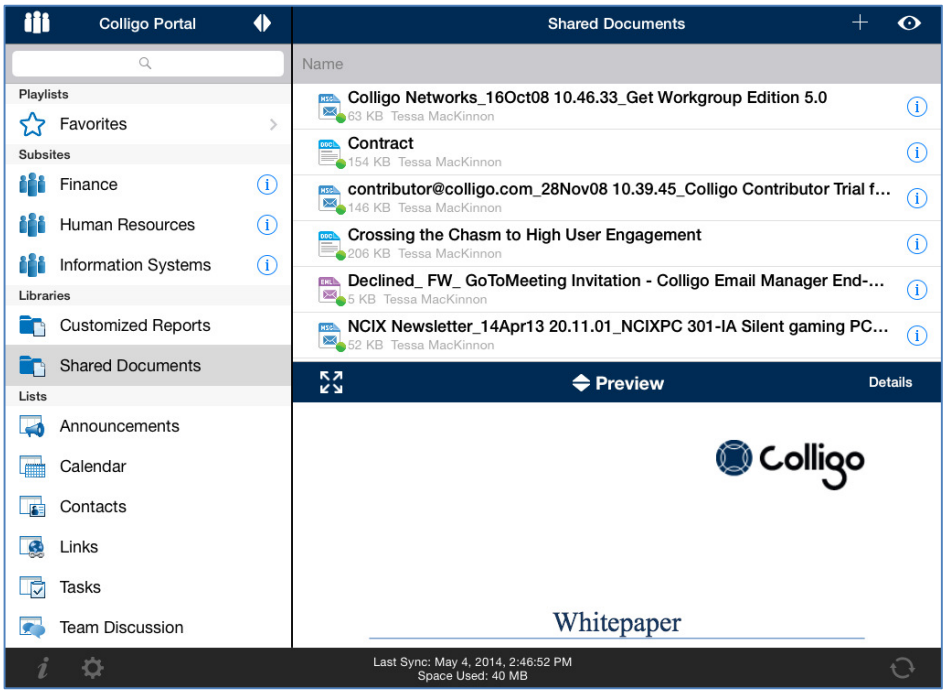
Previewing an Item

To preview an item in a document library, select the item in the library. The **Preview** pane is open by default at the bottom of the screen. The file displays in the pane:



To resize the preview pane, drag the tab up or down.

Tap the **Details** button to view the details of the item.

Tap the icon to display the item on a separate full screen.

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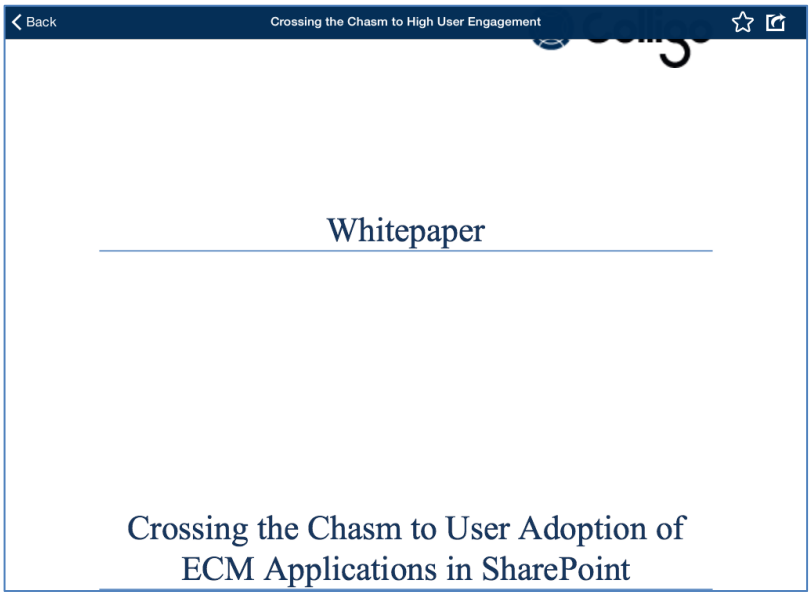
Viewing an Item

To view the contents of an item, tap the file name in the list. If the **Preview** pane is open, the content displays there. If not, the contents display on a separate screen:



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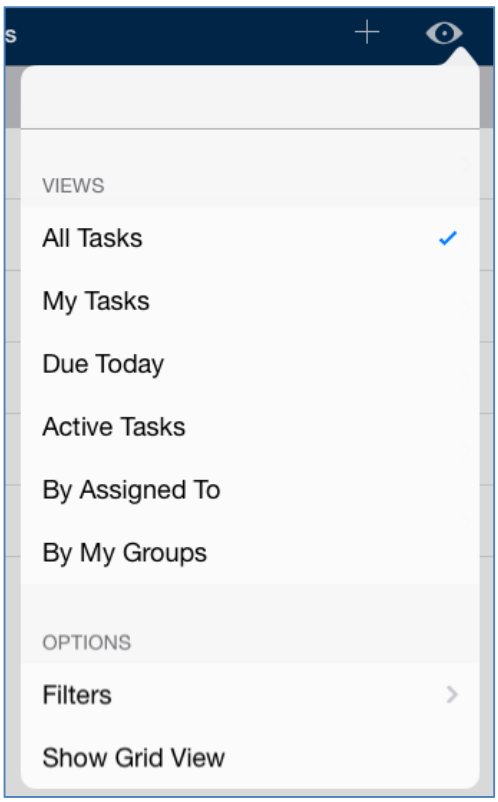
Applying Views and Filters to Lists or Libraries

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

Applying Views

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

1. Tap the icon in the top right corner of the screen.
   A drop-down list of available views displays.
2. Choose your preferred option from the list of available choices:



NOTE: the views available for the list or library are set in SharePoint.

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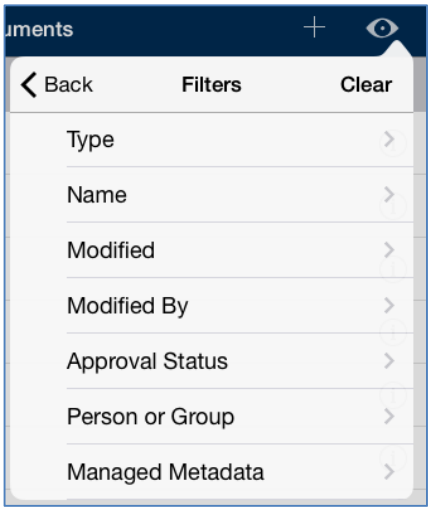
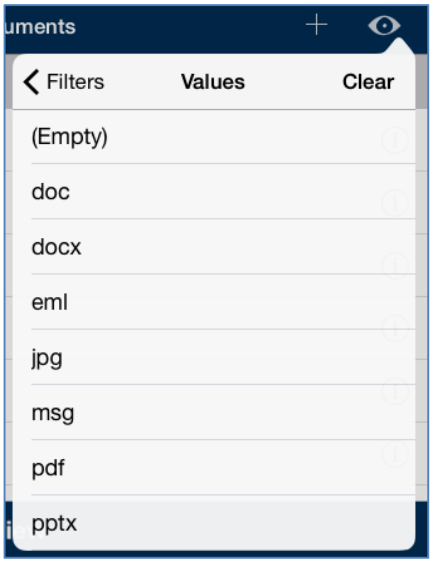
Applying Filters

To apply a metadata filter to your content:

1. Tap the icon in the top right corner of the screen.
2. In the **Options** section, tap **Filters**.
   A list of metadata fields that are attached to the list or library displays:



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



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

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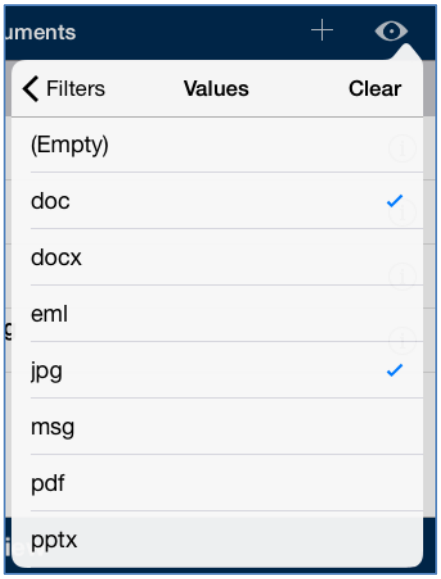
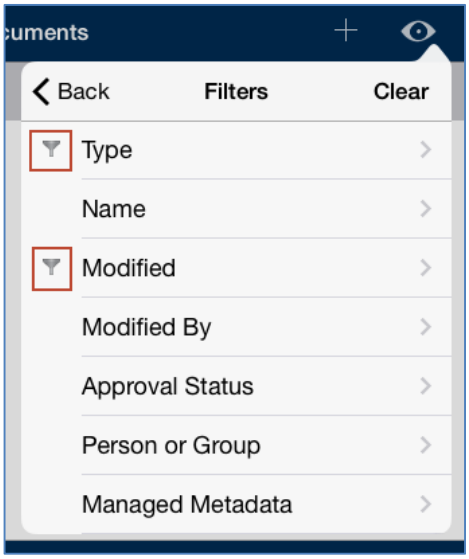


The check mark icon indicates which values are being used as filters.
To set new filters, tap the **Clear** button.

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



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

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

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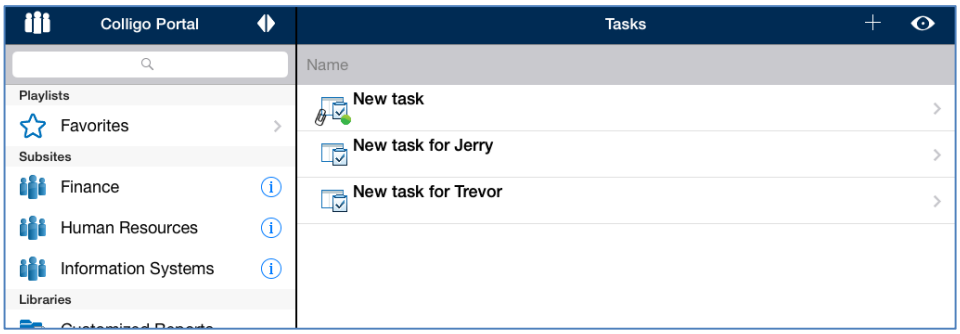
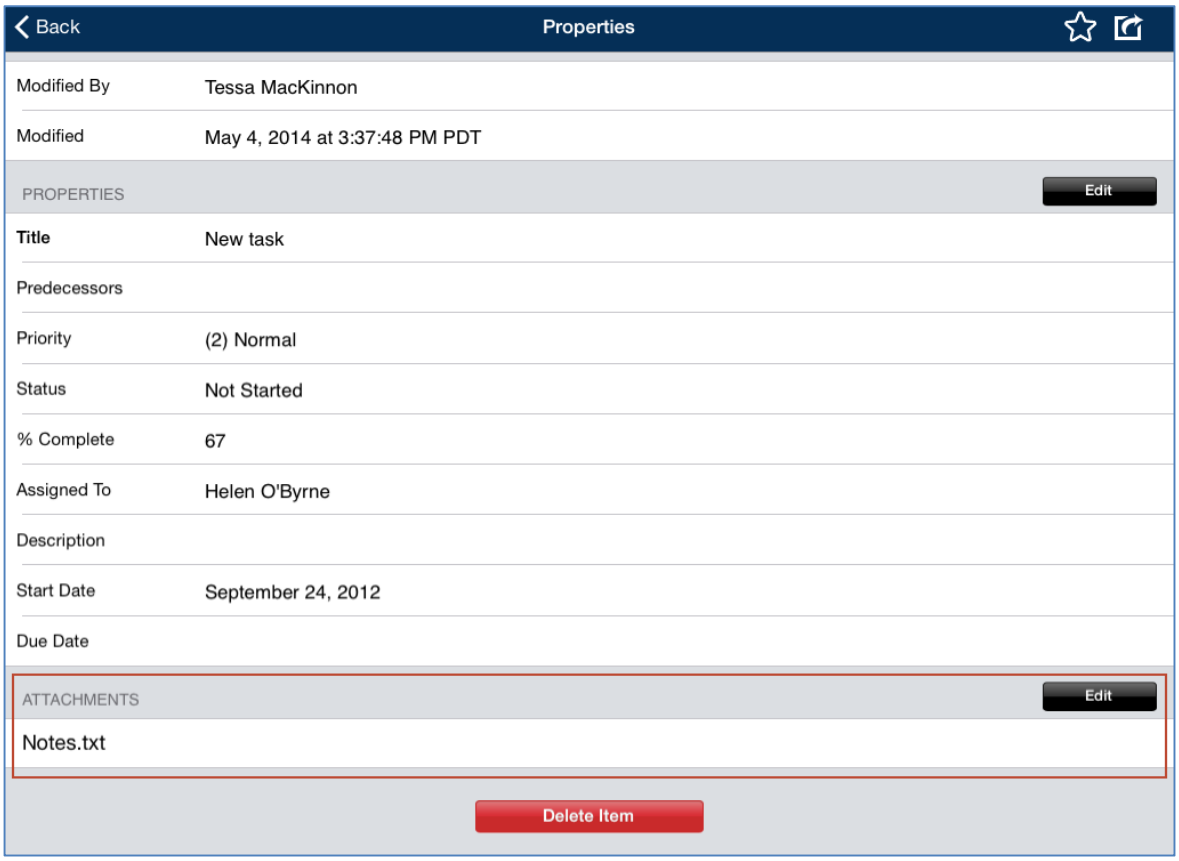
Viewing Attachments in Lists

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



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

The **Properties** screen displays:



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

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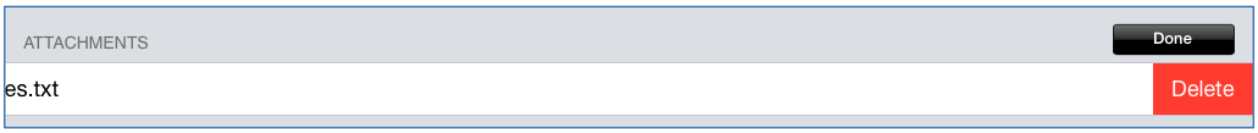
Deleting Attachments

To delete an attachment in a List:

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



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

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

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Viewing, Editing, and Creating InfoPath Forms

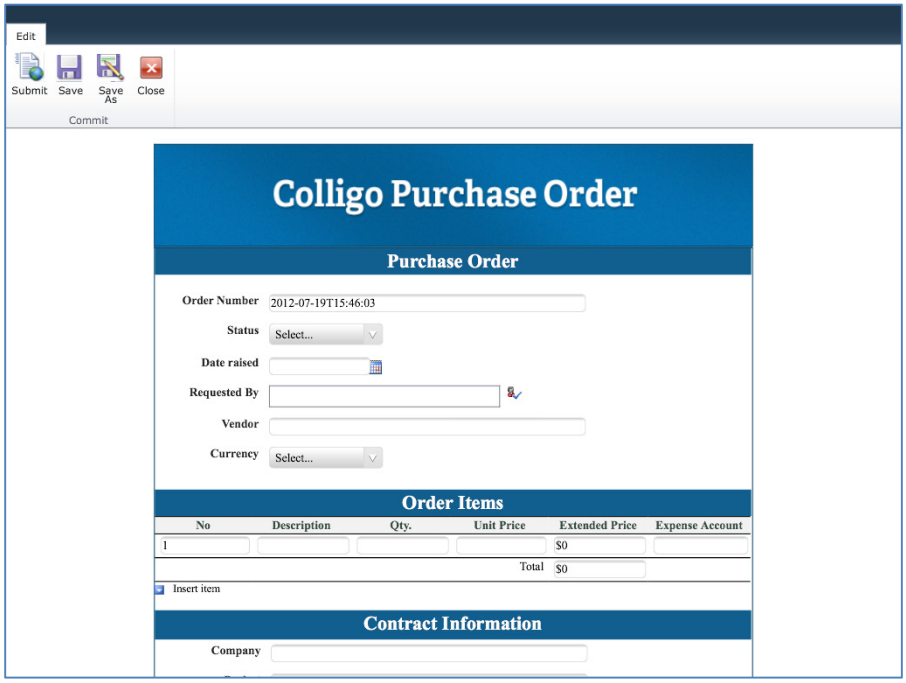
Colligo Engage supports the creating, viewing, and editing of InfoPath forms in both libraries and lists.

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

Viewing or Editing InfoPath Items

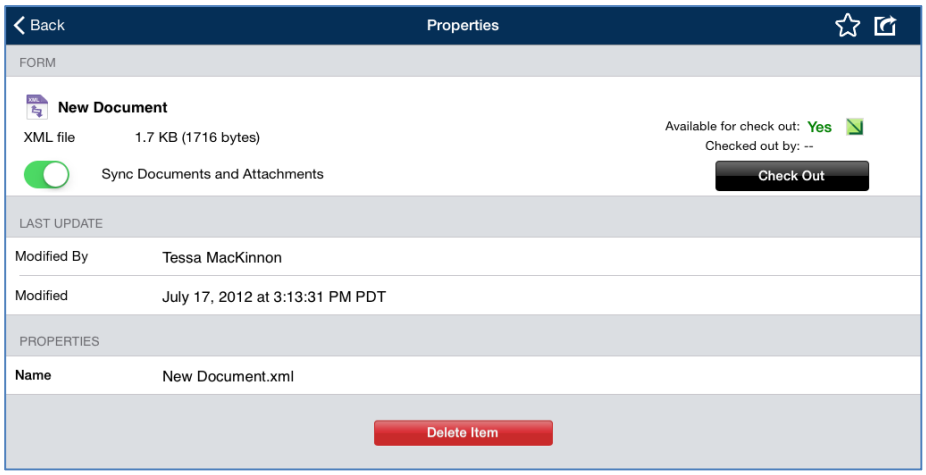
To view and edit the contents of an InfoPath form:

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



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

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



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

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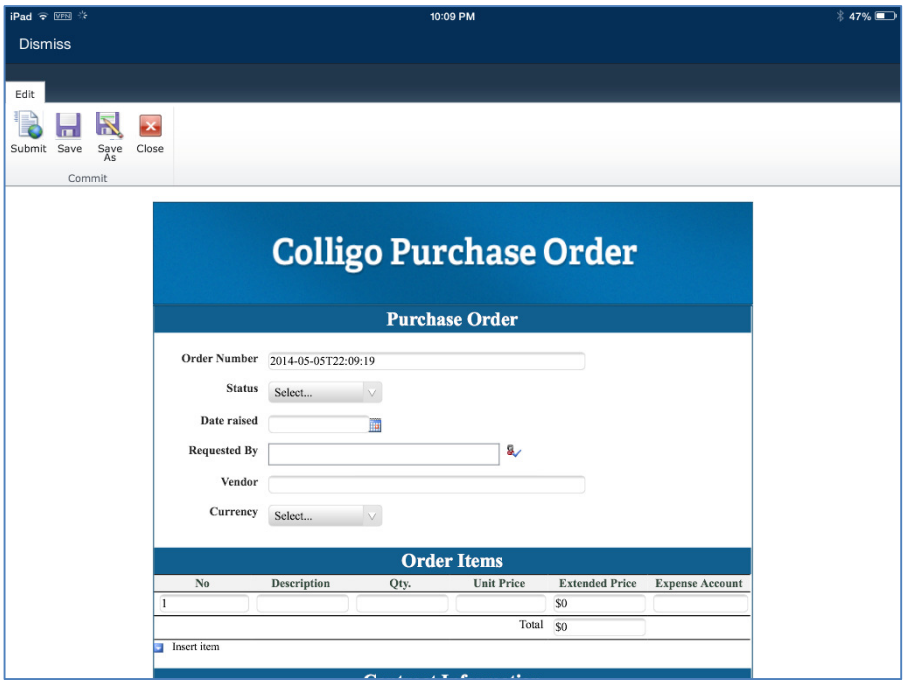
Viewing and Editing Item Properties.

Creating New InfoPath Form Items

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

To create a new InfoPath form item:

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



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

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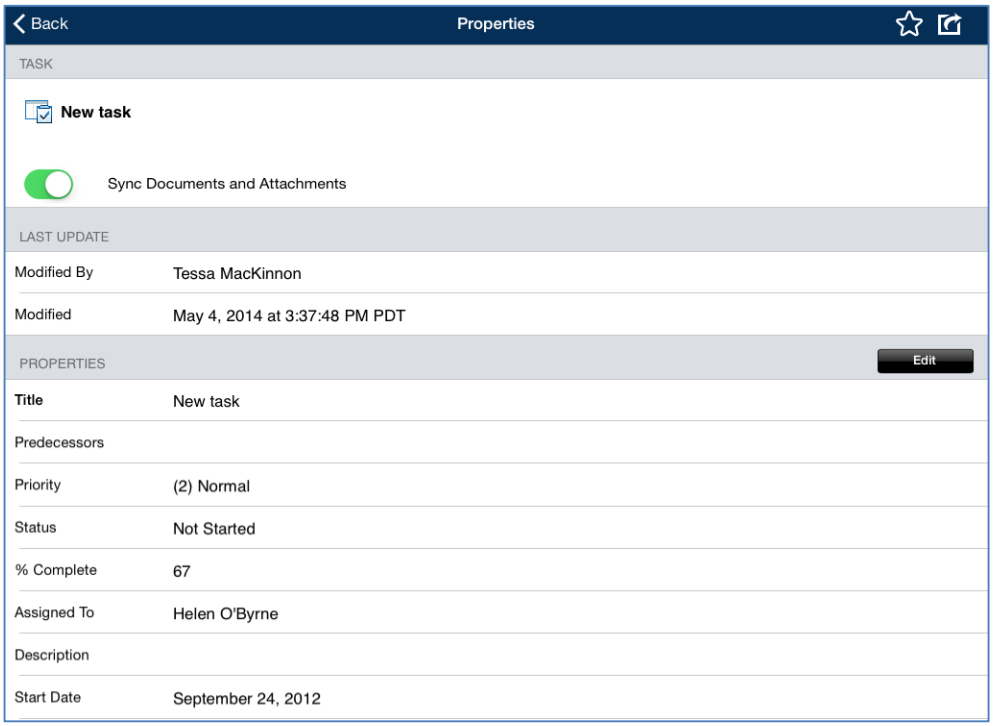
Viewing and Editing Item Properties

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



Tap the star icon ☆ to add the item to a Playlist.

Tap the action icon to display contextual options for the item. The options are dependent on the file type and the configuration of your iPad. For more information, see **Sharing Items**.

Viewing Item Details

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

Syncing an Item

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

Checking an Item Out/In

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

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

Deleting an Item

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

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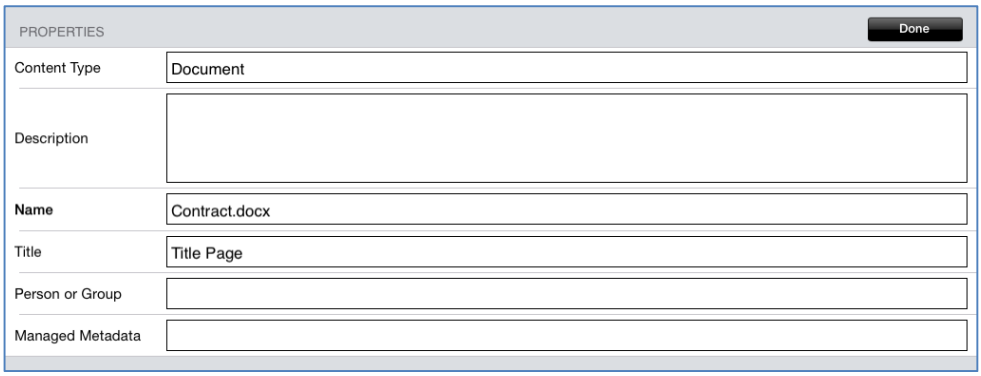
These items are deleted on your next sync.

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

Editing Item Properties

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

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



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

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

- If the field is text based, the keyboard displays
- If the field is Yes/No, tap once to toggle between them
- For date fields, tap once to display the following and scroll to the preferred date:

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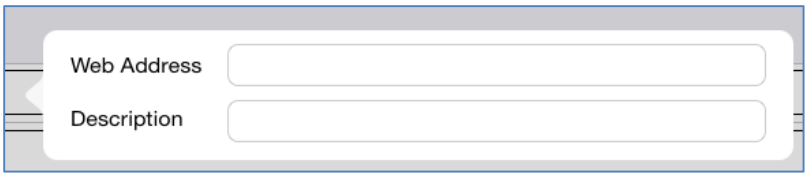
- For Date and Time fields, tap once to display the following and scroll to the preferred date and time:
- For Hyperlink fields, tap once to display the following fields:



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

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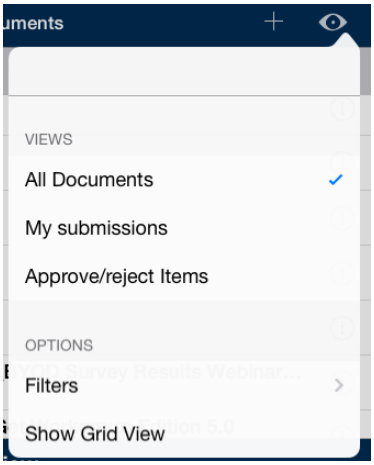
Viewing Item Properties in Grid View

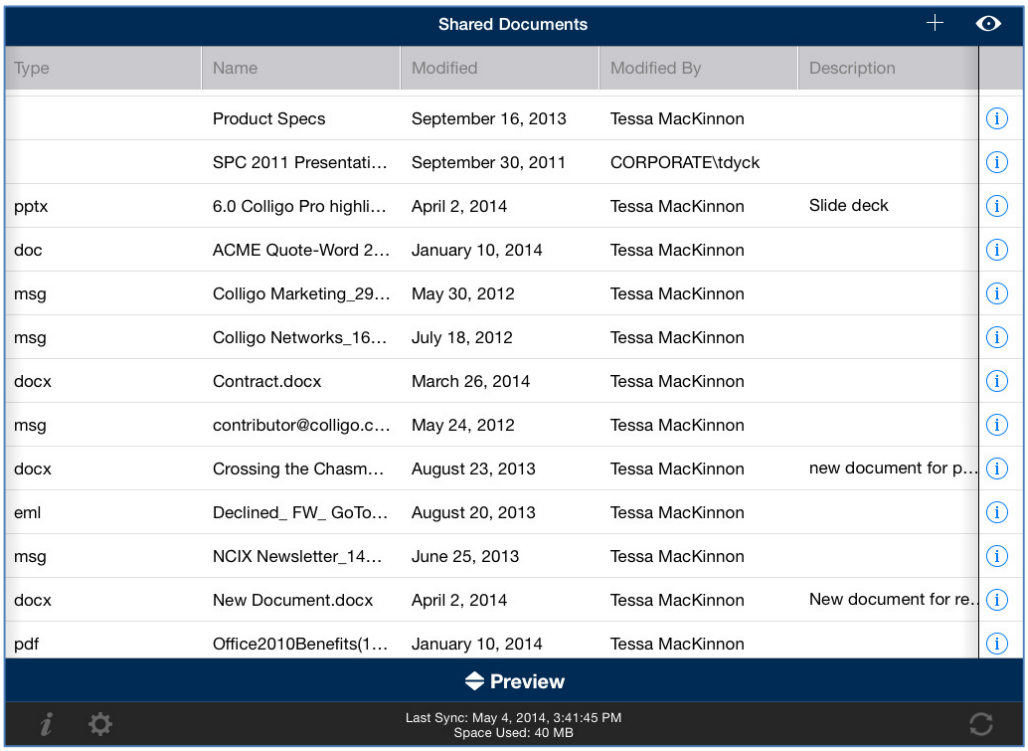
Colligo Engage offers a grid view of all items in a list or library so you can see all metadata for all items at the same time.

To display this view:

1. Click the icon in the top right corner of the screen:



2. From the **Options** menu, select **Show Grid View**.
   The metadata displays in the grid view:



You can scroll back and forth to view all metadata columns. The metadata columns are defined in the SharePoint list or library.

Tap the ⓘ icon to view the details for that item.

Tap the item name to display the item contents on a separate screen.

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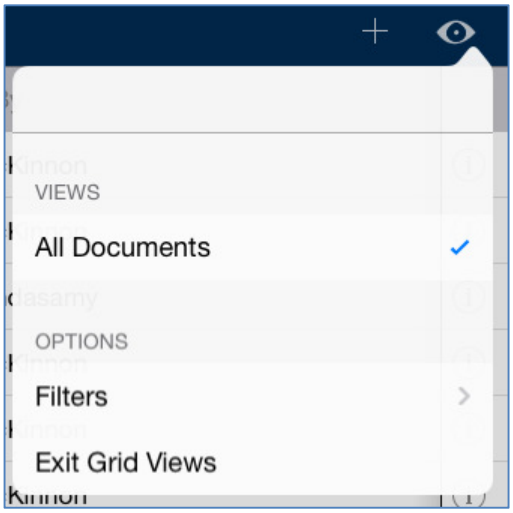
You can apply views and filters in the grid view. For more information, see **Applying Views and Filters to Lists or Libraries**.

To exit grid view, choose the **Exit Grid View** from the menu:



Editing Item Properties in Grid View

While you are looking at a library's item in grid view, you can edit the properties.

To do so, tap the field in the item line to select it, then double-tap to edit.
NOTE: not all properties are editable in grid view.

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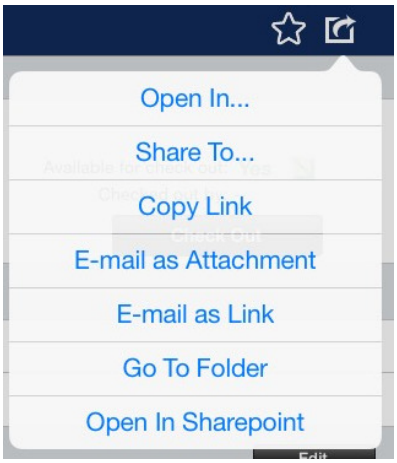
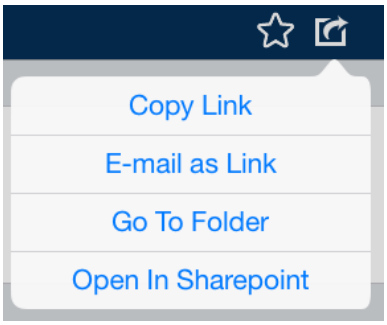
Sharing Items

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

Library:	Library:	List:
		

Opening and Editing an Item

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

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

Sharing an Item

An item can be shared to another application on the iOS device by selecting **Share To…** and selecting the 3rd part application to send the item to. This will open up the 3rd party application inside a window within Colligo Engage for you to specify where to save the item to and what to call it.

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Copying a Link to the Item

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

Emailing an Item as an Attachment

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

Emailing an Item as a Link

Choose the **Email as Link** option to launch a new email with a link to the item in SharePoint and a link to the item within Colligo Engage. You must have an email program present on your iPad for this option to display. If you click on the Colligo Engage link you will be taken to the Colligo Engage Offline copy of the item, and if this doesn't exist you will be taken to the document through the browser.

Getting the Colligo Engage Link

If you are looking to send a link to a document and for it to be opened using Colligo Engage the link needs to be sent in the following format:

colligoengage://<location of File>/<File Name>

for example:

colligoengage://Firestarter.SharePoint.com/Shared%20Documents/Project365/Plan.xlsx

If this is sent to a user who doesn't have the Colligo Engage iOS Application installed the link won't work, and if the user doesn't have the item stored offline it will open the item in a browser.

Printing an Item

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

Viewing Details

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

Go to Folder

Choose the **Go To Folder** option to return to the item's List location.

Open In SharePoint

Choose the **Open in SharePoint** option to launch the online view of the list.

Approving or Rejecting an Item

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

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

The **Approve**/**Reject** dialog displays:

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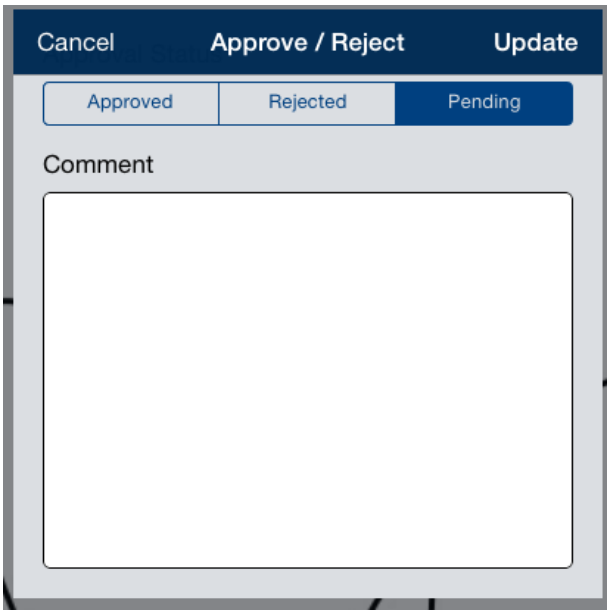

Enter any comments you might have and tap the appropriate label in the **Approval Status** bar:

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

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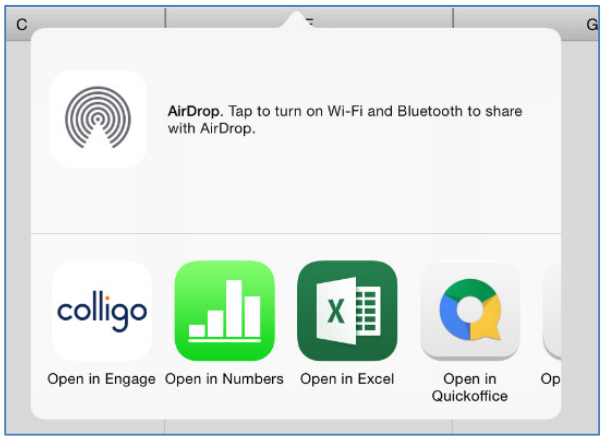
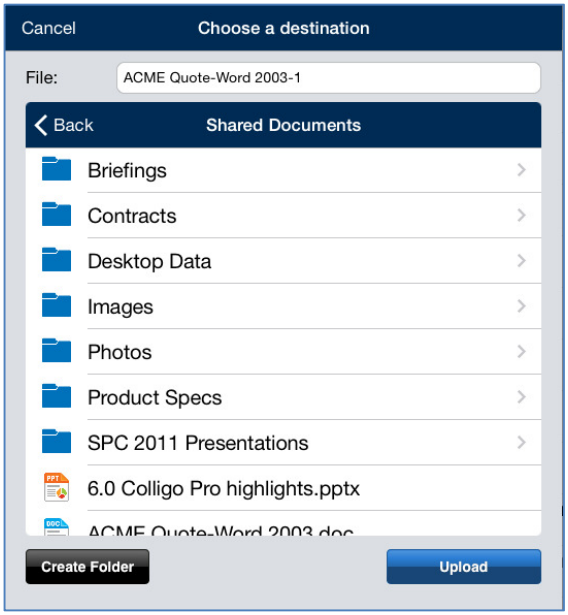
Uploading Items to SharePoint

To upload an item to SharePoint through Colligo Engage:

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



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



3. Navigate to the List or Library you want to file the item to.
   NOTE: If you are saving an item to a library, you are uploading it as its own item. If you are saving it to a list, you are attaching it to a list item.
4. To create a new folder in a Library, tap the **Create Folder** button and enter a name for the folder in the **Create a Folder** dialog.
5. If a library has versioning enabled, you can tap **Add New Version**. If you do not want to add a new version of the same document, you need to rename it before uploading it.
6. Tap **Upload**.

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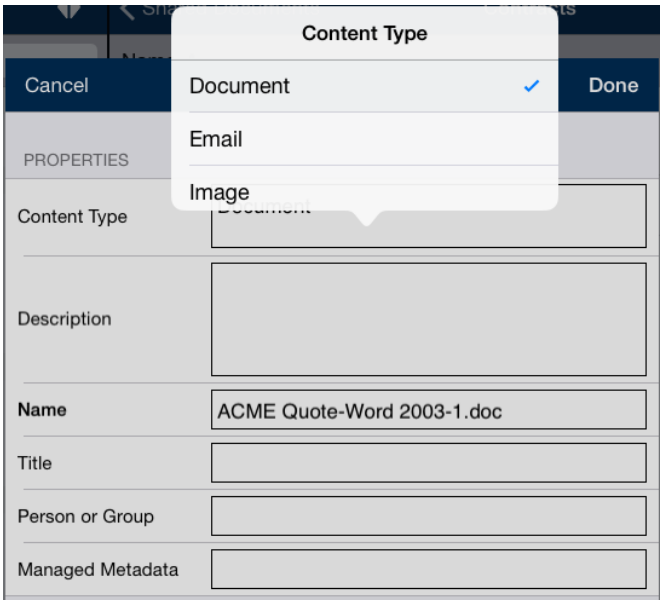
The **Properties** screen displays, reflecting the fields that have been set up in the SharePoint library you are uploading the item to:



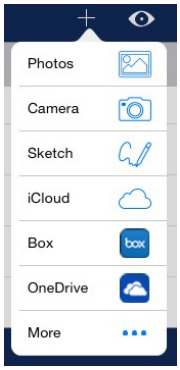
7. Tap the **Content Type** field and choose the preferred option (if displayed). The fields that display may change according to the Content Type chosen.
8. Enter any information about the item in the appropriate fields.
9. Tap **Done**.
   The item is uploaded to the SharePoint location.
   If you are offline, the file is uploaded on the next synchronization.
   NOTE: if your SharePoint site has versioning enabled, you can save the document as a major or minor version to the library.

Uploading items from 3rd party apps into Colligo Engage

To import an item from a 3rd party application like Box or iCloud:

1. Tap the + icon and choose the name of the 3rd party application that you wish to export to.

Note: if the name of the application doesn't show click **More** and select the application you wish to use.



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2. Use the application to browse for you item that you wish to import and select **Done** when complete.
3. Select a location to save the item within Colligo Engage, and rename the item if needed.

Copying items from Colligo Engage to 3rd party apps

To export an item to a 3rd party application like Box or iCloud:

1. Tap the action menu icon and select **Share To…**
2. Select the 3rd part application that you want to copy the item into
3. From the application windows select the location and name of the file to save.

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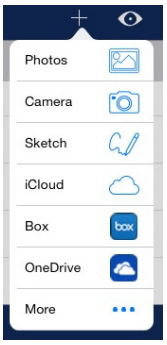
Uploading a Photo or Video from the Camera

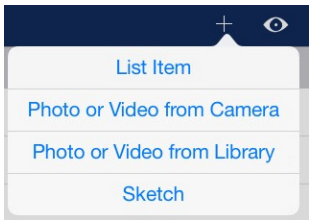
To upload a photo or video from the iPad camera:

1. Tap the icon and choose either **Photo or Video From Camera** or **Photo or Video From Library** from the menu.
   NOTE: the menu differs depending on whether you are in a list or library:

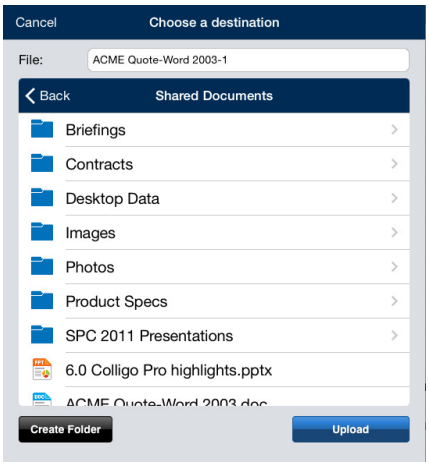
   Action menu for Libraries:



   Action menu for Lists:



2. If you choose **Photo or Video From Camera**, the iPad camera launches.
3. Take the photo or video and tap the **Use** button in the bottom right corner.
   The **Choose a destination** dialog displays:



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

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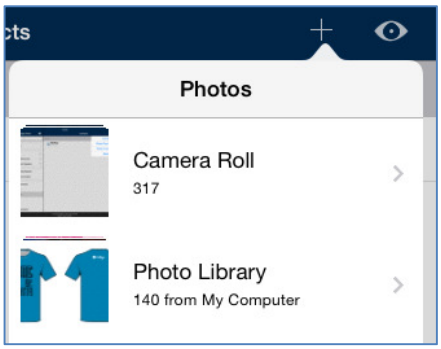
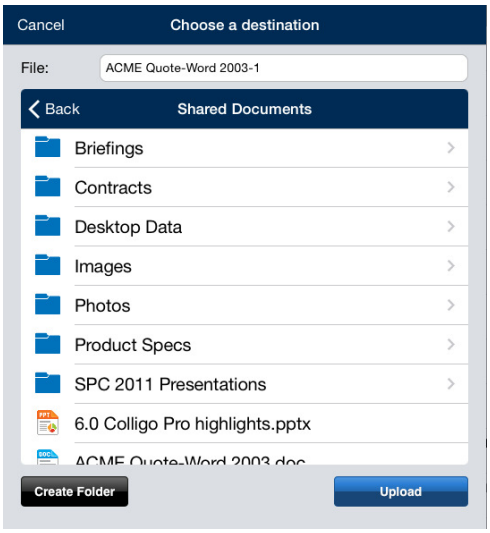
Uploading a Photo from the Library

To upload a photo from the iPad library:

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



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



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

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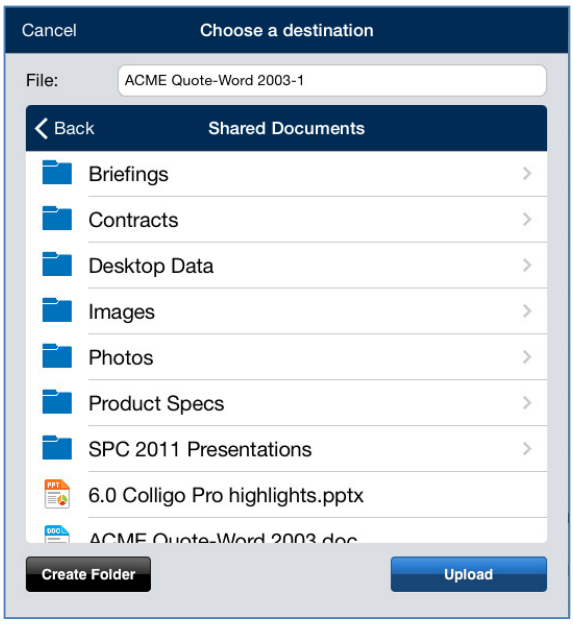
Uploading a Sketch

To create and upload a sketch to a SharePoint location:

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

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



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

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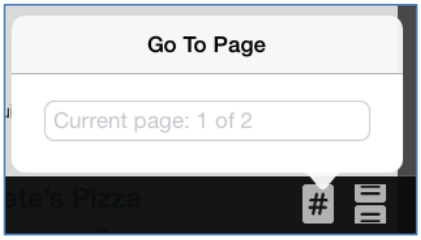
Viewing, Annotating, and Searching PDFs

Colligo Engage allows you to view, annotate, and search PDFs.

Viewing PDFs

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

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



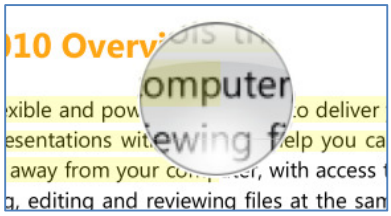
Enter the page number you want to view and tap **Done**.

Annotating PDFs

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

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

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



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

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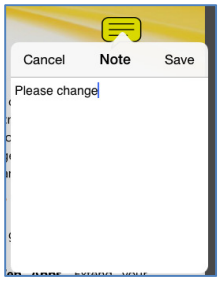

Tap the text icon then tap a location on your document if you want to enter text on the page. You can also change the color of the text by tapping the circle icon and choosing one of the displayed colors.

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

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

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

Saving an Annotated PDF

To save your annotated PDF:

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

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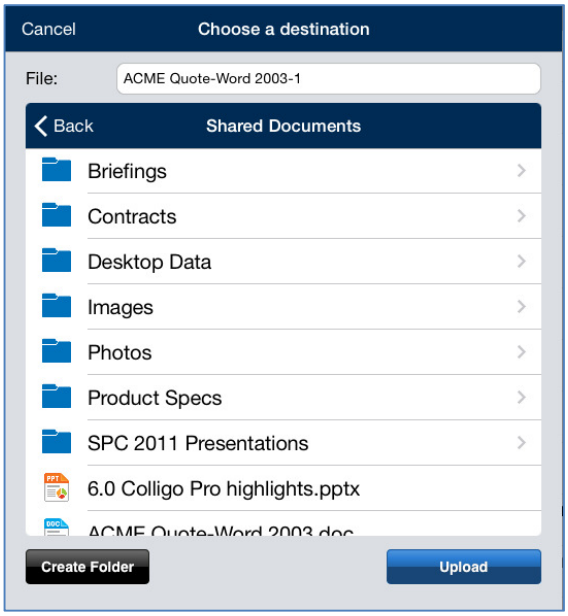

3. Navigate to the List or Library you want to file the item to.
   NOTE: If you are saving an item to a library, you are uploading it as its own item. If you are saving it to a list, you are attaching it to a list item.
4. To create a new folder in a Library, tap the **Create Folder** button and enter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

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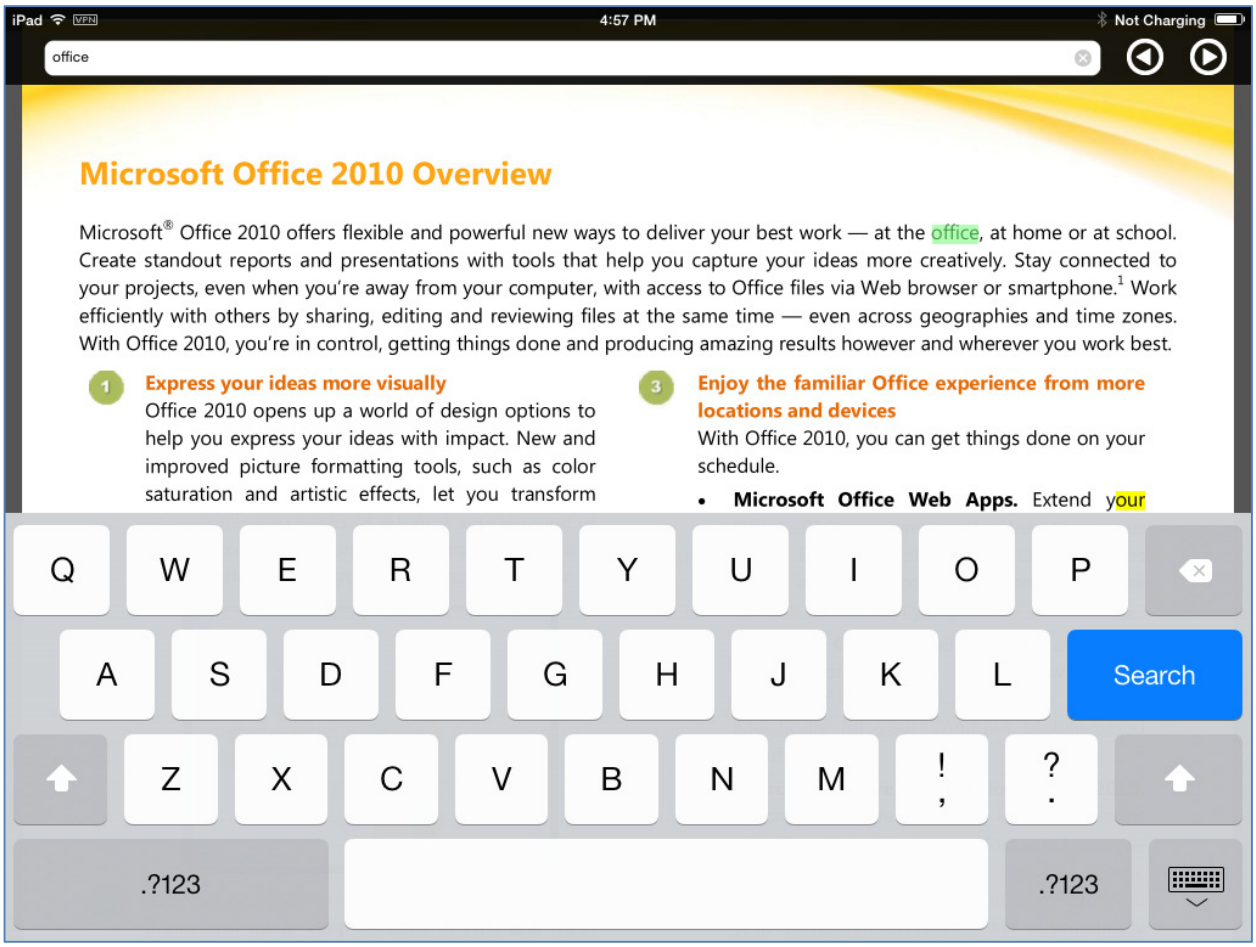
Searching PDFs

To search a PDF:

1. Tap the search icon in the bottom middle of the screen.
   A search field displays at the top of the screen:



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

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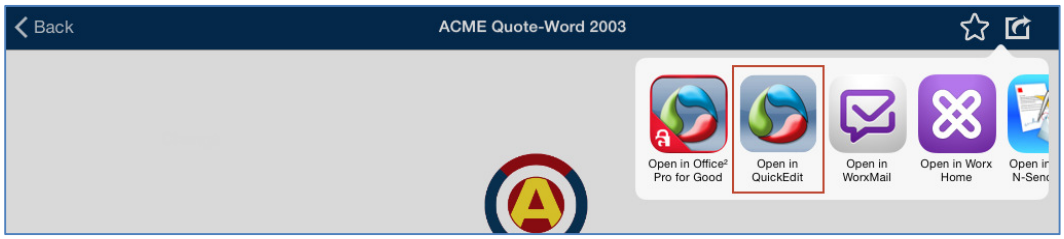
Editing Items with QuickEdit

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

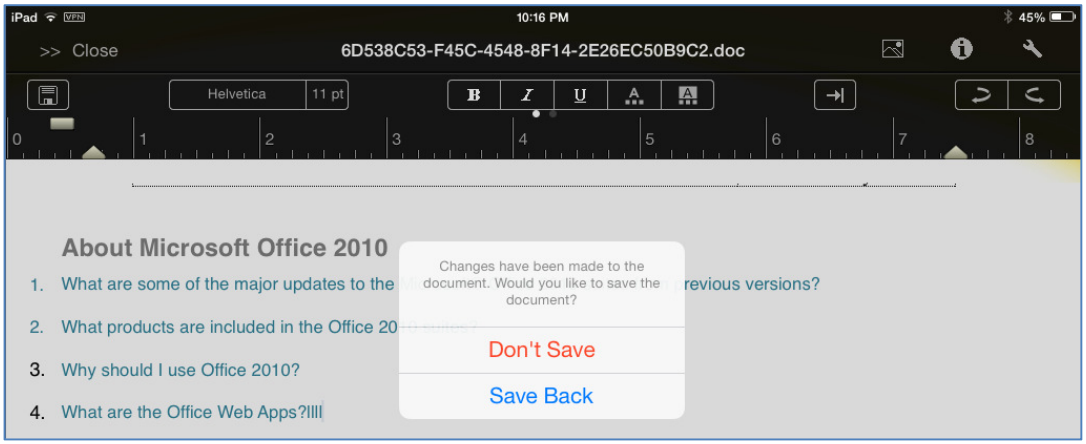
NOTE: QuickEdit is a separate app that must be purchased and installed separate from Colligo Engage.

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



Office²HD launches.

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



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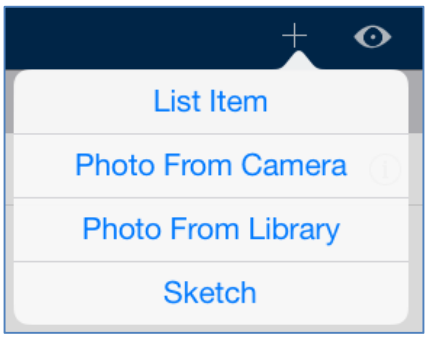
Creating New List Items

To create a new list item:

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



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

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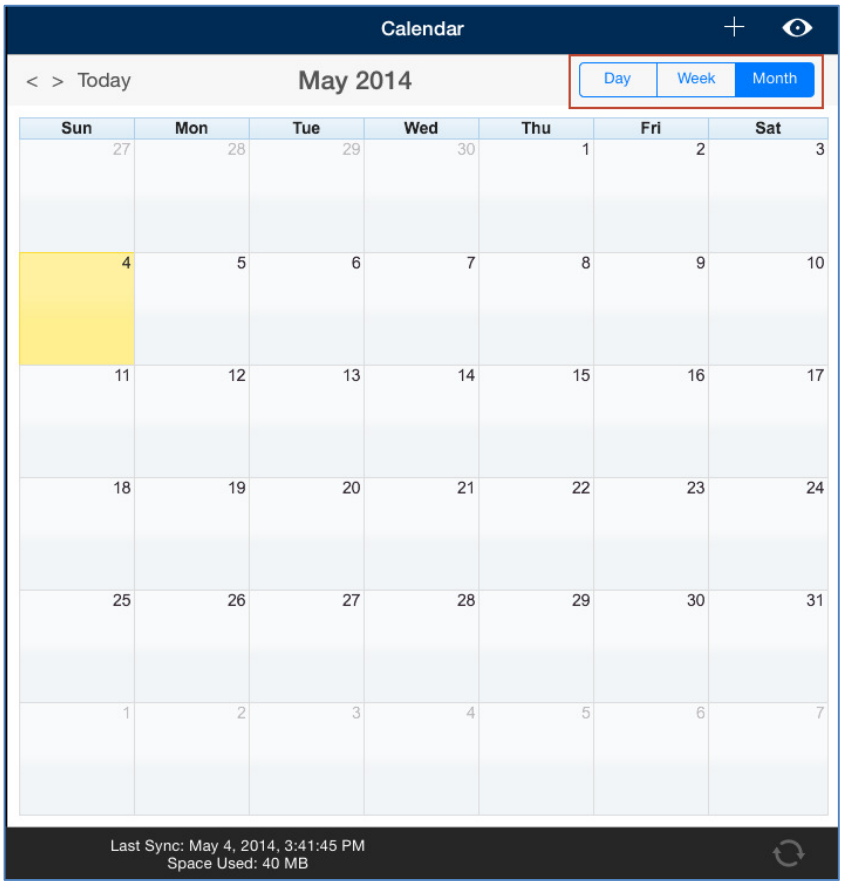
Viewing Calendars

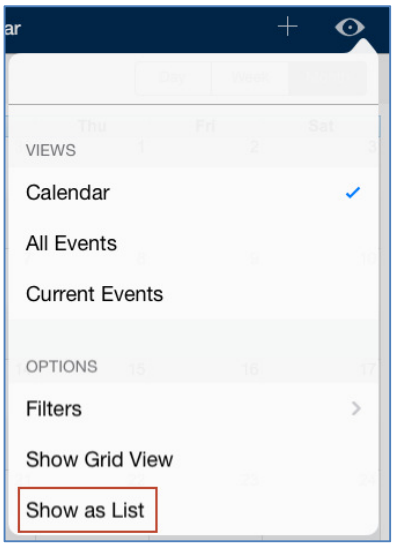
Colligo Engage supports special views for Calendars, presenting a graphical view of a calendar.

To change the view, tap the **Day**, **Week**, **Month** button:



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

If you want to look at Calendar entries as list items, select this option from the following menu:



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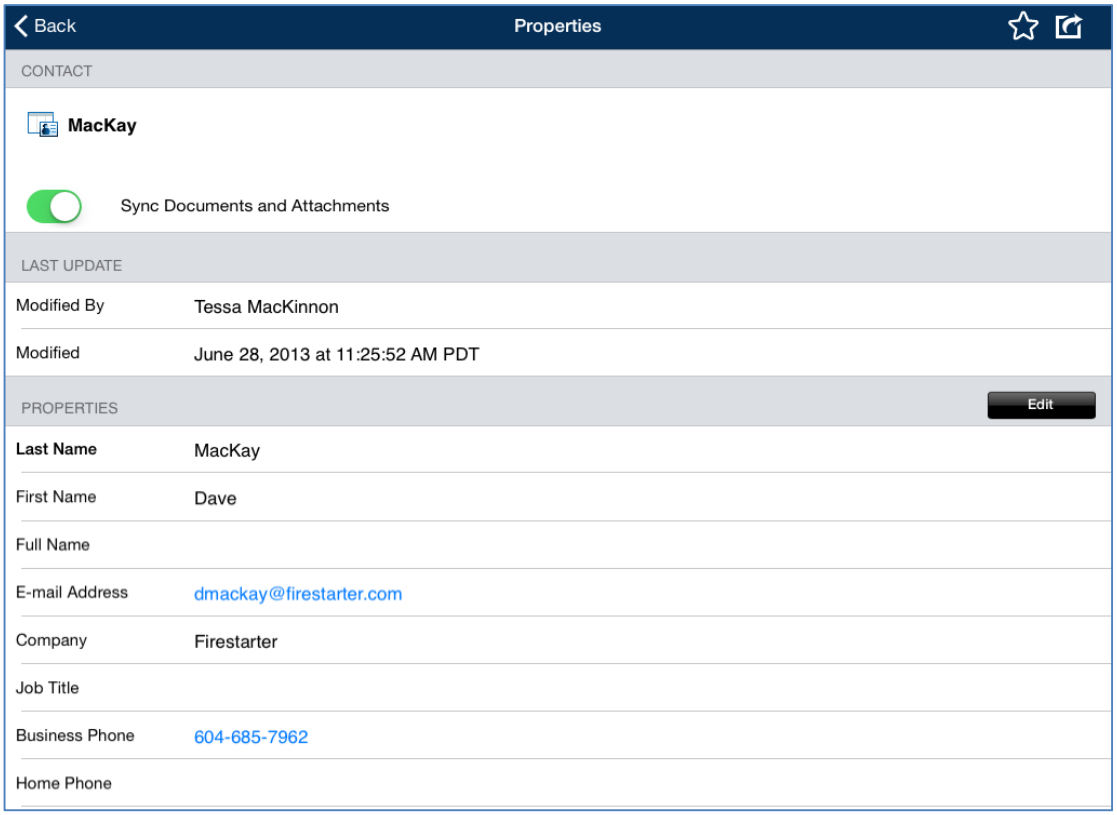
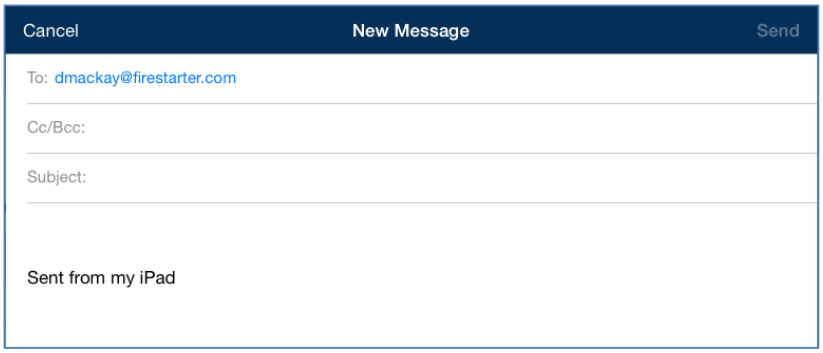
Viewing Contacts

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



You can tap on a contact's address and the location displays on the iPad mapping application.

You can tap a contact's email address to launch your mail client:



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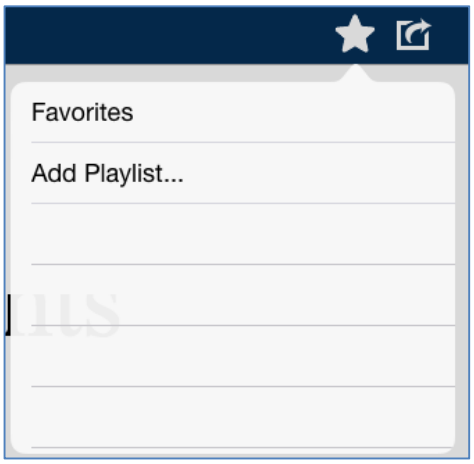
Managing Playlists

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

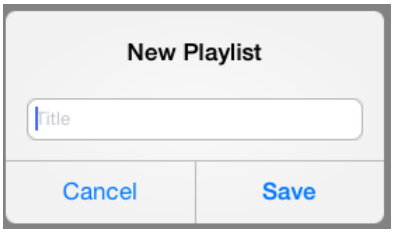
Adding an Item to a Playlist

To add items you view frequently to a Playlist:

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



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



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

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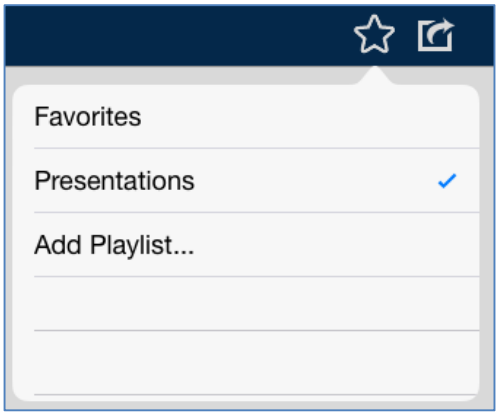
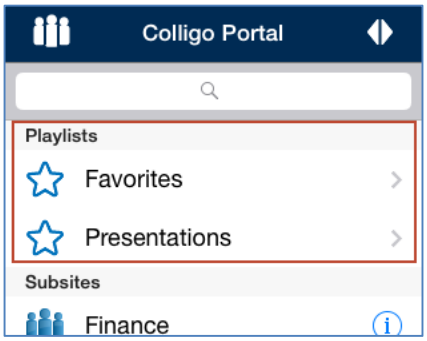


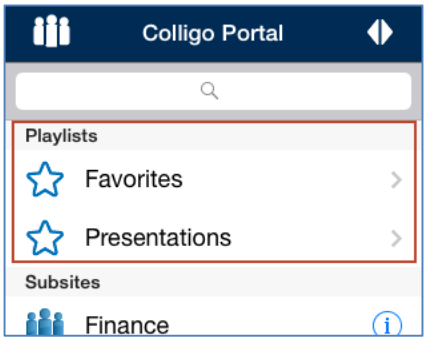
7. All lists display under the **Playlists** section on the home screen:



NOTE: For information about adding a folder to a Playlist, see **Managing Folder Settings**.

Viewing Playlist Items

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



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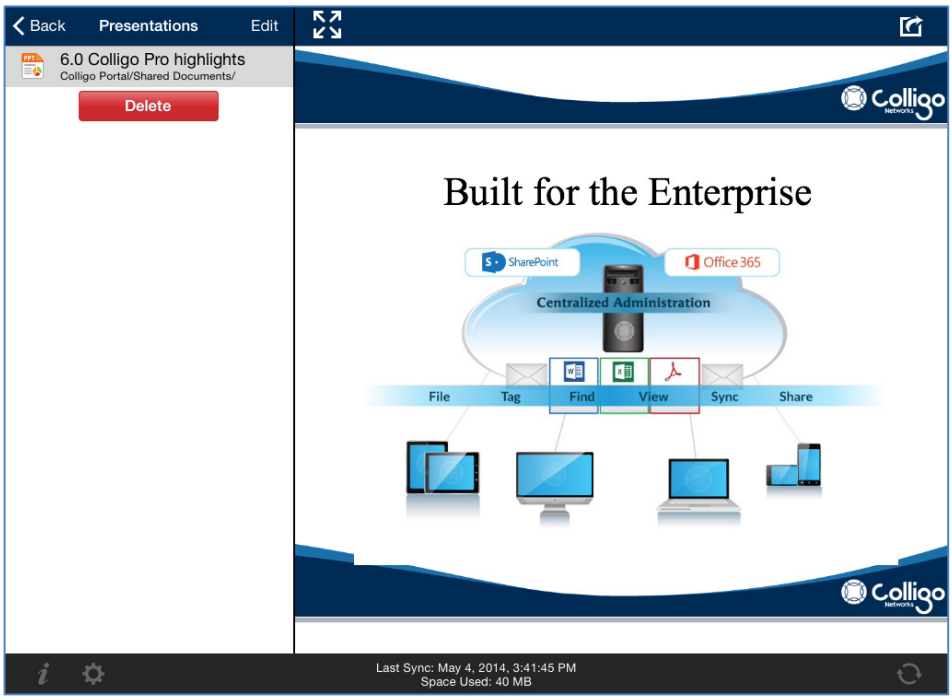
A list of your items displays, with the selected item content displayed in the preview pane beside it:



To view the item in full screen, tap the icon.

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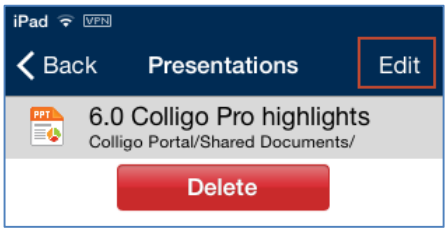
Editing and Deleting Playlist Items

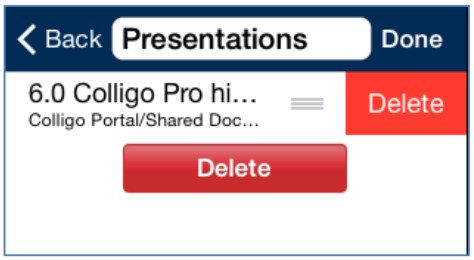
To edit or delete items in a Playlist:

1. Tap the **Edit** button.



   The list displays with a red icon beside each item.

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



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

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

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

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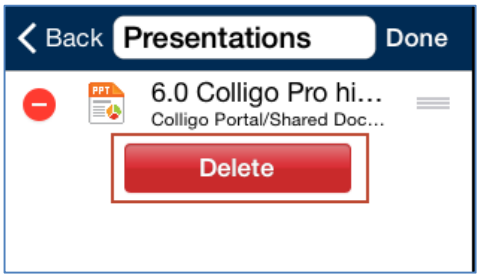
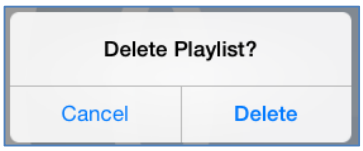
Deleting a Playlist

To delete a Playlist:

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



A confirmation dialog displays:



2. Tap **Delete**.

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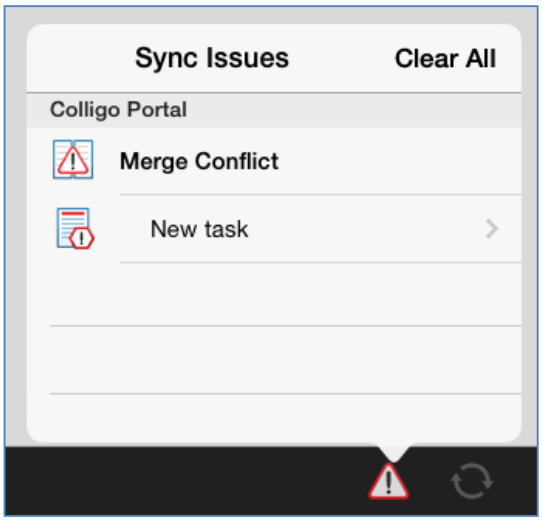
Resolving Synchronization Conflicts

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

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

Conflicts are detected during synchronization and if any are found, the conflict icon displays beside the sync button.

Tap the conflict icon to display the list of sync issues and tap the item you want to resolve:



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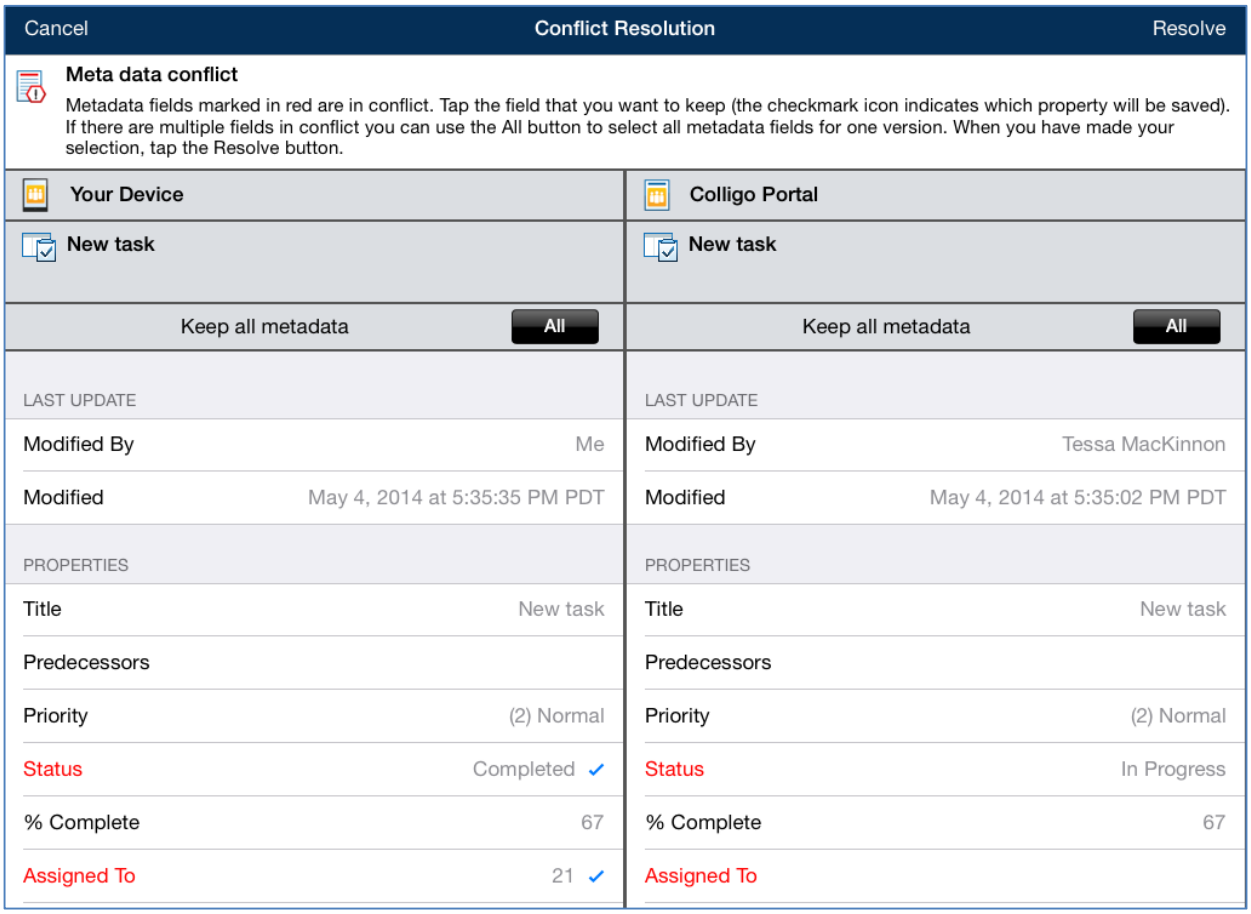
Metadata Conflict

The **Conflict Resolution** screen displays all conflicted fields marked in red. To resolve the conflict:

1. Tap the field that you want to keep (the checkmark icon ☑ indicates which property will be saved).
   If there are multiple fields in conflict, use the **All** button to select all metadata fields for one version.
2. When you have made your selection, tap the **Resolve** button in the top right of the screen.



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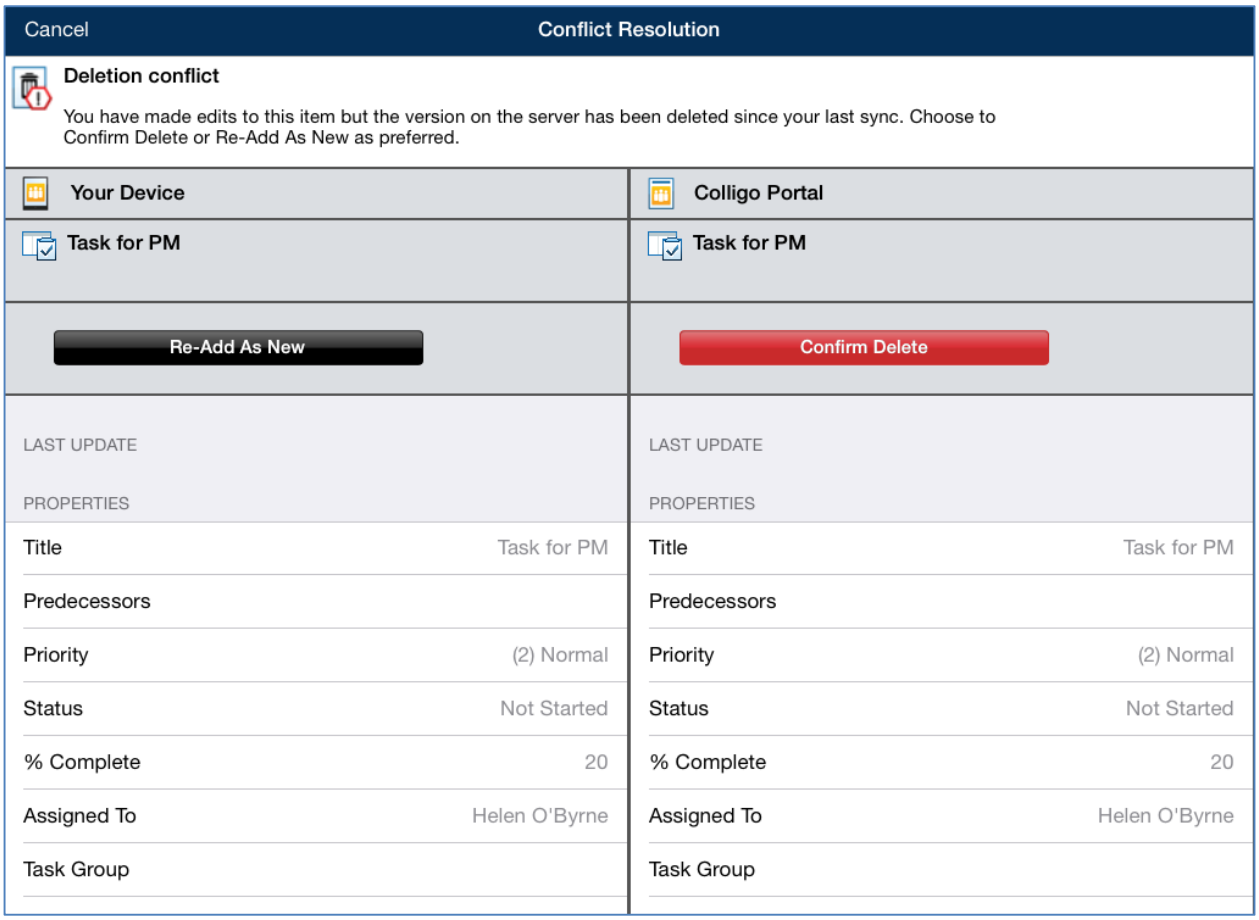
Deletion Conflict

To resolve a deletion conflict:

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



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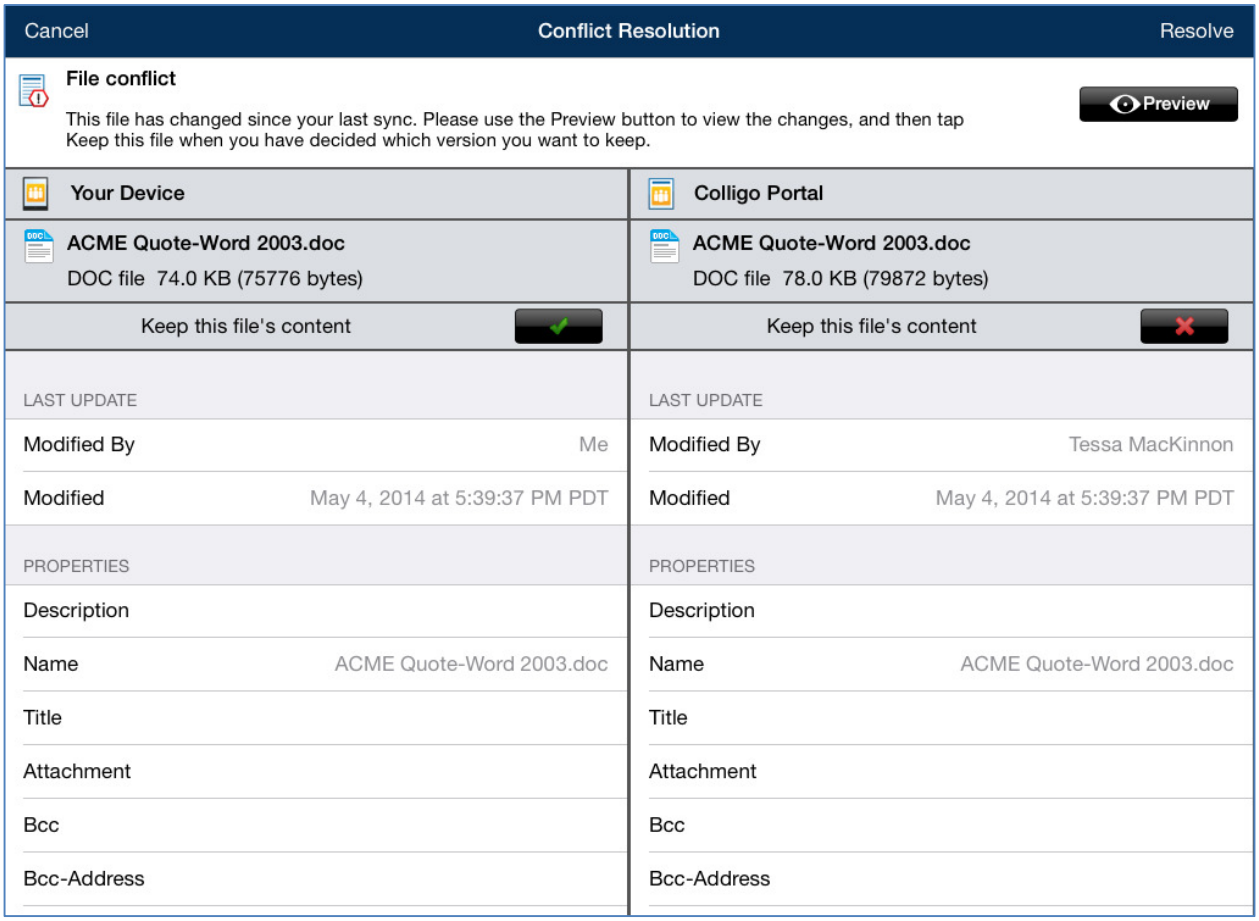
File Conflict

To resolve a File conflict:

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



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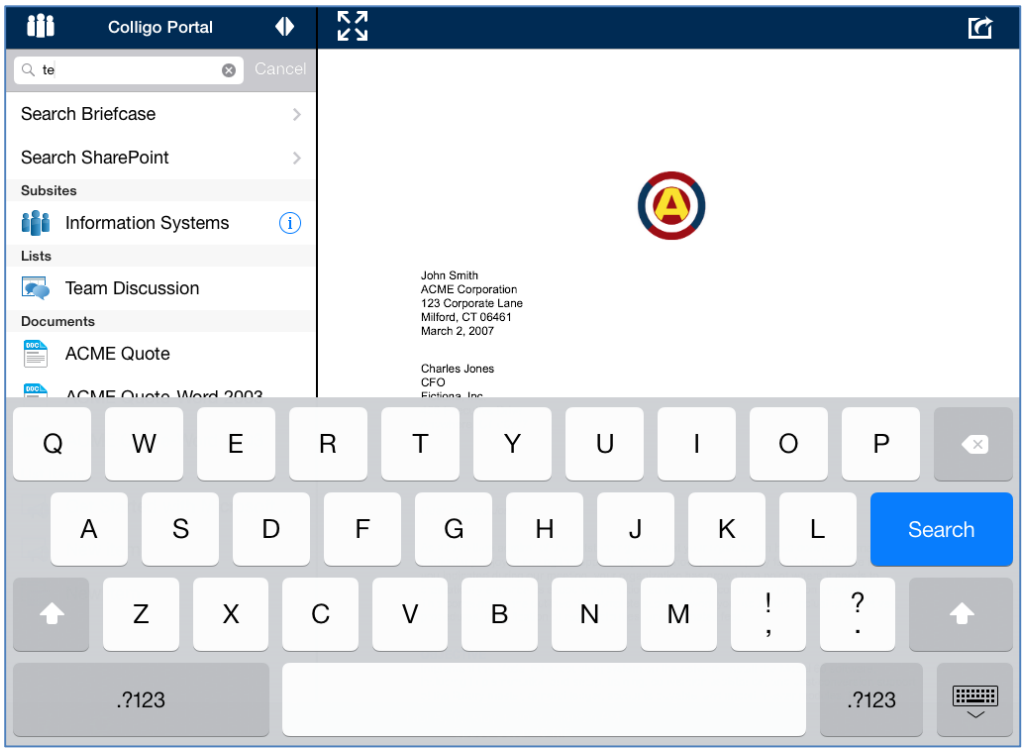
Searching SharePoint Lists and Libraries

Filtering Lists and Libraries

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

You can select an item in the results and it displays in the right-hand pane:



To view the item in full screen, tap the icon.

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

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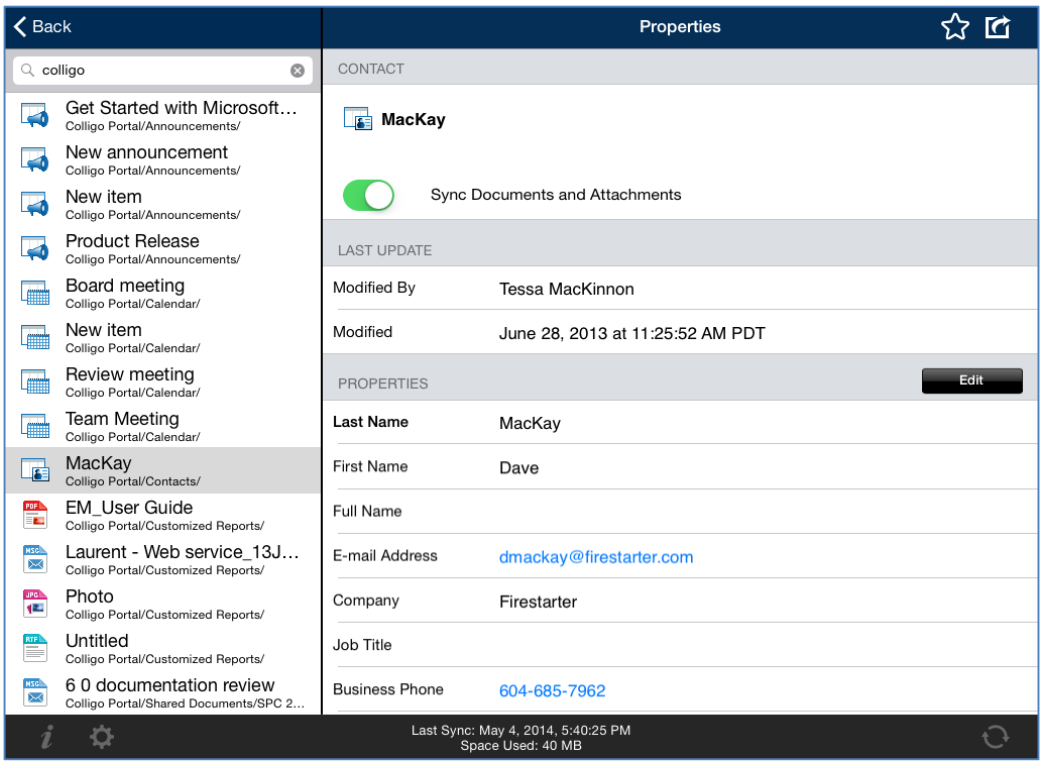
Searching Engage

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



To view the item in full screen, tap the icon.

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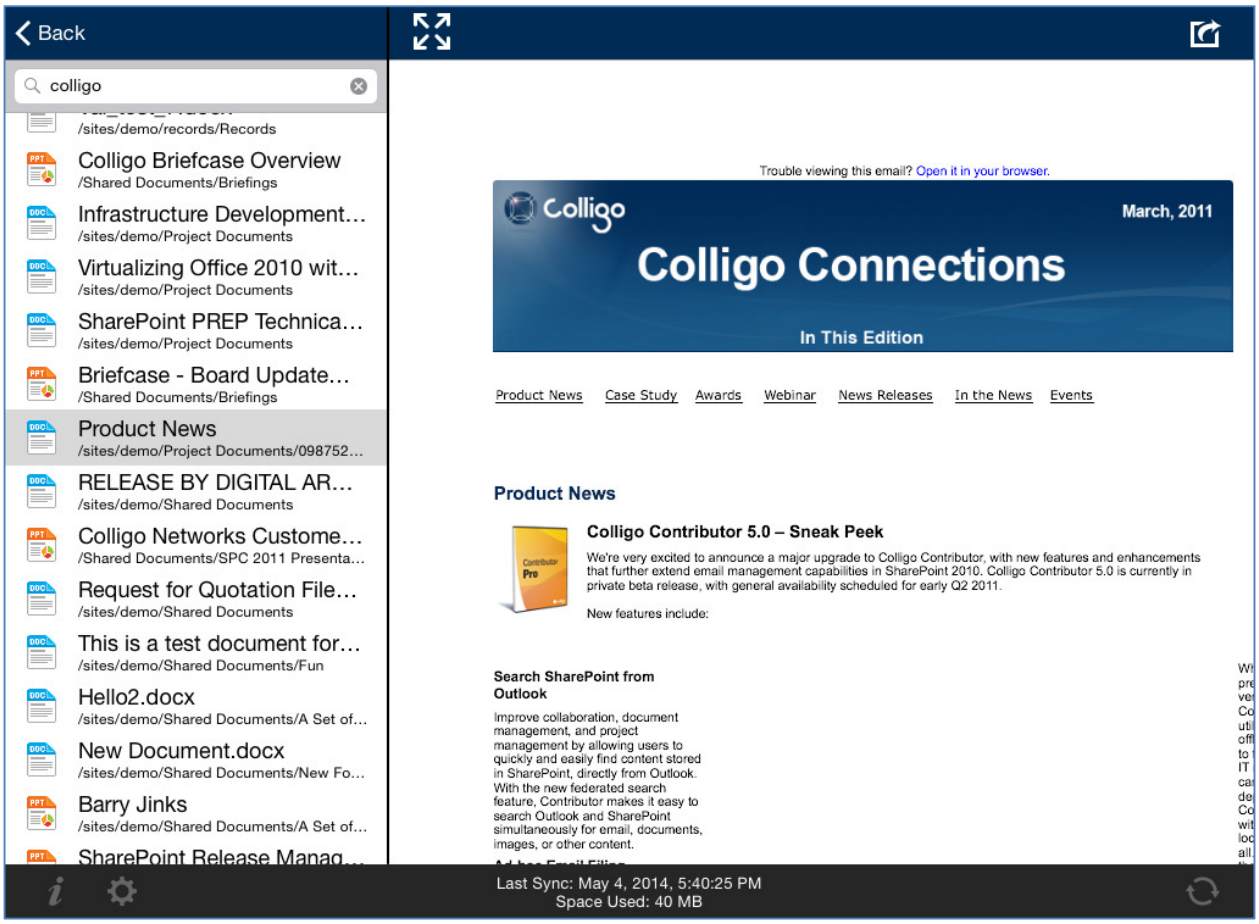
Searching SharePoint

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

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

NOTE: this option is only available online



To view the item in full screen, tap the icon.

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Managing Settings

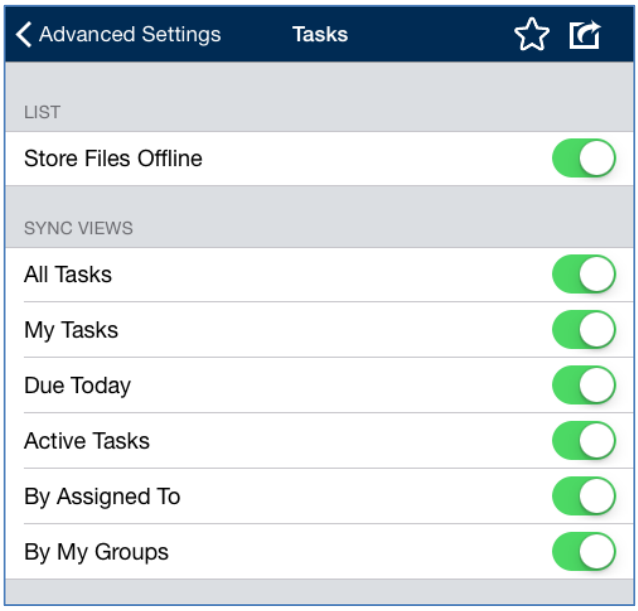
In Colligo Engage you can specify settings both at the folder level and at the application level. Site settings are specified when you connect the site initially. For information on editing site settings, see **Editing a Site**.

Managing Folder Settings

You can manage the settings for each folder, provide links to the folder locations, and add folders to a Playlist.

To manage folder settings:

1. Navigate to the advanced settings for the Folder you want to set tasks for.
   The folder settings dialog displays:



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

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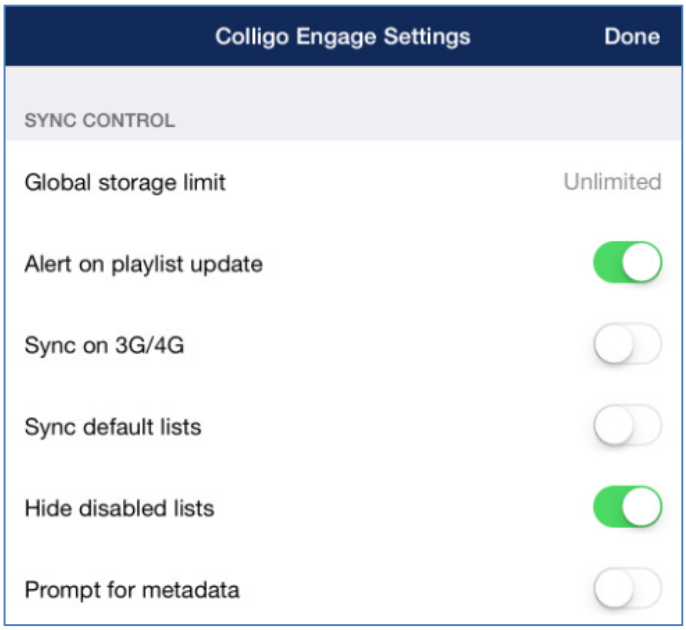
Managing Application Settings

1. Tap the icon at the bottom of the screen to display the **Colligo Engage Settings** dialog:



2. In the **Sync Control** section, configure the following settings as preferred:
   a) **Global storage limit**: This setting specifies how much local storage on the iPad should be used for syncing SharePoint content offline. You can also select a No Sync mode where no content is stored offline, documents and other items are only downloaded when they are previewed. Choose one of the following options:
      i. No Sync, Browse Only
      ii. 10 MB
      iii. 20 MB
      iv. 50 MB
      v. 100 MB
      vi. 200 MB
      vii. 500 MB
      viii. 1 GB
      ix. 2 GB
      x. 8 GB
      xi. 16 GB
      xii. Unlimited
   b) **Alert on Playlist update**: This setting lets you choose if you want to receive an alert when an item that you have added to a Playlist is updated. Tap to choose **ON** or **OFF**.
   c) **Sync on 3G/4G**: This setting lets you prevent any syncing on 3G/4G so your data plan isn't used up. Tap to choose **ON** or **OFF**. If you choose to turn this setting off, you can still sync data through a wireless internet connection.
   d) **Sync default lists**: If this setting is on, when you select a subsite that has not been synced, the default content is automatically synced. If this setting is off, you are prompted to manually choose which content you want to sync. Tap to choose **ON** or **OFF**.

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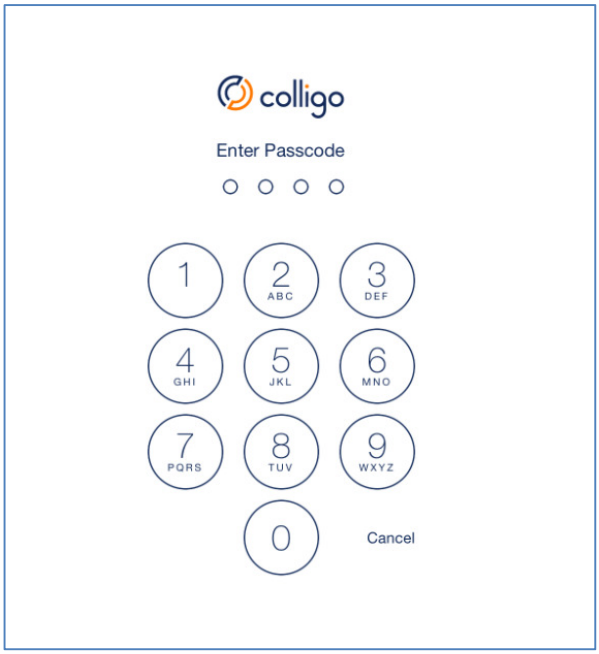
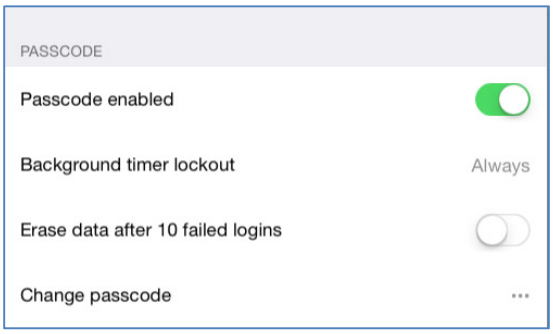
e) **Hide disabled Lists:** If this setting is on, any lists that you have chosen not to sync are not displayed in the left column. If this setting is off, disabled lists are displayed but are greyed out. Tap to choose **ON** or **OFF**.

f) **Prompt for metadata**: this setting lets you control whether or not the **Properties** screen that comes up when you add a new item to a List or Library displays. Tap to choose **ON** or **OFF**.
NOTE: if the prompt is turned off but there is a required field in the Library or List, the file remains checked out to the user who has uploaded the file and cannot be checked in until these fields are completed.

3. In the **Passcode** section, tap the **Passcode Enabled** field.
The **Enter Passcode** screen displays:



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



i. **Passcode enabled**: if you want to disable the passcode you need to enter the existing passcode to do so, unless you have enabled it within the previous minute
ii. **Background timer lockout**: tap to choose the length of idle time that will trigger a lockout

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iii. **Erase data after 10 failed logins**: tap to choose **ON** or **OFF**
iv. **Change passcode**: tap this button to display the **Change Passcode** dialog; enter the existing passcode, then enter the new passcode twice to confirm.

4. In the **Logging** section, you can set your logging level as one of the following:
   a. **Off**: choose this option if you do not want to log your actions
   b. **Error**: choose this option if you want to log only error messages
   c. **Brief**: choose this option if you want to log only warnings and error messages
   d. **Verbose**: choose this option if you want to log all actions, warnings, error messages, and all other information
5. Tap the **Email log file** field to launch an email that includes a screenshot of your current screen, as well as the log.txt file.
6. In the **About** section, you can access additional resources
   a. Tap the **Support** button to connect to the Colligo Community site.
   b. Tap the **Website** button to launch www.Colligo.com.
   c. Tap the **Privacy Policy** button to view Colligo's privacy policy.
7. The version number is displayed below the **About** section

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Appendix I: Supported File Types

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

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

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