Colligo Briefcase for Mac

Installation Guide

Contents

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 Colligo Administrators.

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 Administrator Guide

- Briefcase for Mac User Guide

Requirements

Requirements are listed in the Release Notes available on the support site at http://support.colligo.com.

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

   o This community is free and open to anyone

3. Colligo Online Support: https://www.colligo.com/support/request

   o Submit a ticket online if you have current M&S or an active subscription.

Installation

Colligo Briefcase can be installed for all users of a computer or for a single user. To install for all users of a computer, an Administrator account is required.

Enterprise deployments are supported with solutions such as Jamf. For deployment using other enterprise deployment solutions, please contact Colligo Technical Support (https://www.colligo.com/support/request) to discuss the feasibility of your solution.

Note: Data migration to version 7.5 is supported from version 7.2.x. To upgrade from earlier versions of Colligo Briefcase you must first upgrade your existing version to version 7.2.0. Alternatively, uninstall your existing version and install 7.5.0 as a fresh installation.

Installation on a single computer

The installation process for Colligo Briefcase is straight-forward and the installer will guide you through it. To install Colligo Briefcase:

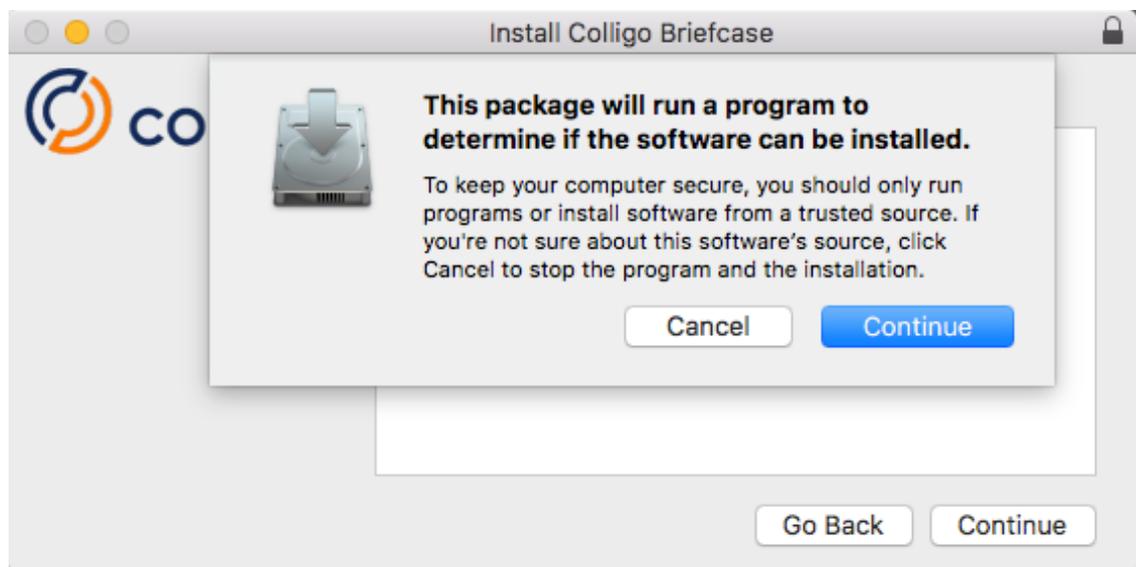1. Double-click the **.pkg** file to launch the installer:

Figure 1: Colligo Briefcase Installer

2. Click **Continue** to confirm that you wish to proceed with the installation

3. The **Introduction** will appear, with a migration message. If you meet the requirements, click **Continue**. Otherwise, cancel the installation.

4. The **File Changes** step displays a warning message regarding open files. Ensure relevant files are closed, and then click **Continue**.

5. If a previous version of Colligo Briefcase is running, you will see a message requesting you to close the application. Click **Quit Briefcase** to continue.

6. If you are migrating from 7.2.x, you will next see the **Data Migration** step. Click **Continue** to proceed.

7. The **Installation Type** step will tell you how much space will be used by the installation, and provides the option to **Change Install Location….**
Clicking this option will allow you to choose from:

- Install for all users of this computer

- Install for me only

- Install on a specific disk…

Choose an option and click **Continue**.

Click **Install** to proceed with the installation.

8. If you are installing for all users, you will be prompted to enter your Administrator password. Once you have done this, click **Install Software**.

- Installation messages will be displayed in the panel.

- Any open Finder windows will close and then reopen.

9. When the installation has completed, the **Run Briefcase** panel will be displayed. It is recommended that you click the **Run Colligo Briefcase Now** button.

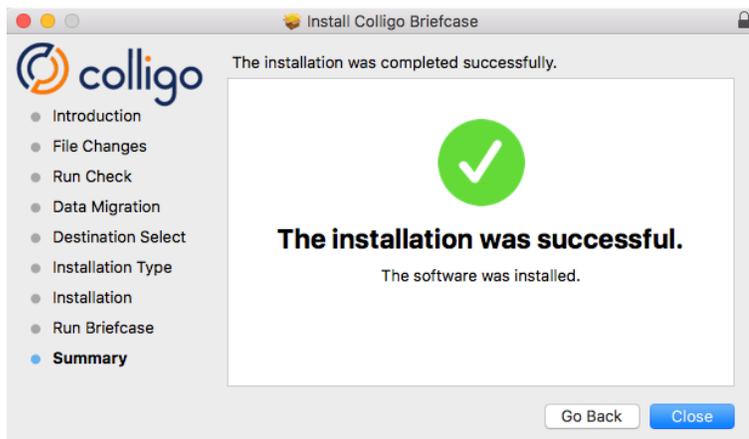10. Click **Close** on the **Summary Panel**

Figure 2: Colligo Briefcase Installation Successful

11. A popup will ask you if you want to move the installer to the Trash. Do so if desired.

The Colligo icon ⊘ will display in the top menu bar when Colligo Briefcase has been installed.

Enterprise deployment using Jamf

Enterprise deployments are supported with solutions such as Jamf. For deployment using other enterprise deployment solutions, please contact Colligo Technical Support (https://www.colligo.com/support/request) to discuss the feasibility of your solution.

The information in this section assumes that the Jamf Software Server (JSS) has already been installed and configured.

Configuring Jamf for Silent Installation of Colligo Briefcase

There are two parts to a silent installation: Uploading the Colligo Briefcase package to the JSS, and Creating a policy to install Colligo Briefcase.

Uploading the Colligo Briefcase Package

To upload a package to the JSS, you must be logged into the JSS in a web browser.

1. Click the **Settings** icon in the top-right corner of the page.

2. Click **Computer Management** in the left navigation column.

3. Click **Packages** in the **Computer Management** section.

4. Click **New** .

5. On the **General** tab, configure basic settings for the package:

   > **Display Name:** enter a name

   > **Category:** as per your company

   > **Filename:** click **Choose File** and browse to find it

   > **Info** and **Notes** are optional

6. Click the **Options** tab to configure additional settings for the package:

   - (optional) **Requires Restart**

7. Click the **Limitations** tab to configure additional settings for the package:

   - This is where you can specify an Operating System requirement, if you have one.

8. Click **Save**.

9. Click **Check-In** in the **Computer Management – Management Framework** section.

10. Click the **Login/Logout Hooks** tab.

    - Ensure that **Create login/logout hooks** and **Check for policies triggered by login or log out** are checked.

11. Click **Save**.

Creating an installation policy for Colligo Briefcase

The steps below will create a policy that will install Colligo Briefcase as a new instance or as an upgrade from version 7.2.x.

To create an installation policy, you must be logged into the JSS in a web browser.

1. Click **Computers** at the top of the page:

2. Click **Policies**.

3. Click **New** .

4. On the **General** tab, configure basic settings for the policy:

    Display Name: Install Colligo Briefcase 7.5

    Enabled: checked

    Category: as per your company

    Trigger: Logout

    - This ensures that an existing installation can be upgraded successfully.

    Execution Frequency: Once per computer

    Target Drive: as per your company

5. On the **Packages** tab, click **Configure**.

6. Choose from the list of packages and click **Add**.

7. Choose **Install** from the **Action** pop-up menu.

8. On the **Scope** tab, define the targeted users/computers.

9. (Optional) Click the **User Interaction** tab and enter messages to display to users or allow users to defer the policy. For example:

    - **Start Message:** Installing Colligo Briefcase…

    - **Complete Message:** All done!

10. Click **Save**.

Configuring Jamf for Silent Un-Installation

There are two parts to a silent uninstallation: Adding the Uninstall script, and Creating a policy to uninstall Colligo Briefcase.

Adding the un-installation script

To add a script, you must be logged into the JSS in a web browser.

1. Click the **Settings** icon ⚙ in the top-right corner of the page.

2. Click **Computer Management** in the left navigation column.

3. Click **Scripts** ⬛ in the **Computer Management** section.

4. Click **New** ➕.

5. On the **General** tab, configure basic settings for the script:

   > **Display Name:** enter a name

   > **Category:** as per your company

6. Click the **Script** tab to display the script editor.

7. Paste in the provided Colligo Briefcase uninstall script.

   - Administrators may modify the script to their own discretion.

8. Click the **Options** tab and enter **"Jamf"** for Parameter 4.

   - This step is necessary as the script is configured to run for Jamf only if a fourth parameter is configured.

   - For more information regarding Script Parameters, please see this article: https://www.jamf.com/jamf-nation/articles/146/script-parameters

9. Click the **Limitations** tab to configure additional settings for the script:

   - This is where you can specify an Operating System requirement, if you have one.

10. Click **Save**.

Creating an un-installation policy for Colligo Briefcase

To create an un-installation policy, you must be logged into the JSS in a web browser.

1. Click **Computers** at the top of the page:
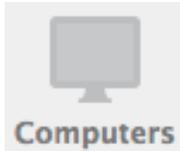
2. Click **Policies**.

3. Click **New** .

4. On the **General** tab, configure basic settings for the policy:

    Display Name: Un-install Colligo Briefcase 7.5

    Enabled: checked

    Category: as per your company

    Trigger: Login

    - This assumes **Create login/logout hooks** has been enabled.

    Execution Frequency: Once per user per computer

    Target Drive: as per your company

11. On the **Scripts** tab, select the uninstall script.

    - Set the **Parameter 4** (**"Jamf"**) value to **true** or **1**.

12. On the **Scope** tab, define the targeted users/computers.

13. (Optional) Click the **User Interaction** tab and enter messages to display to users or allow users to defer the policy. For example:

    - **Start Message:** Un-installing Colligo Briefcase…

    - **Complete Message:** All done!

14. Click **Save**.

End-User experience of a silent installation/un-installation

Silent installation is triggered upon logout. Silent un-installation is triggered upon login.

After logout/login occurs, the Jamf policy will start to run. Users should not do anything with the computer during the installation/uninstallation. (i.e. force a shutdown).

When the policy completes, Colligo Briefcase will have been installed/un-installed.

First Launch

After an upgrade

Colligo Briefcase 7.5 stores files is a different location from 7.2.x and upon first launch of Colligo Briefcase 7.5, files will be moved over the new location.

Storage Limits were introduced in Colligo Briefcase 7.5 and users upgrading to this release may now have Storage Limits imposed. If previously downloaded content exceeds the specified limit, additional content will not be synced down from SharePoint. Users should adjust the Selective Sync settings to resume sync down from SharePoint.

After a new installation or if you removed the license key

Colligo Briefcase utilizes the Engage platform to manage user licensing. When the application first launches, you will be prompted to authenticate with Colligo. If you do not have a Colligo Console account, you can sign up for free. An account is required to use the application. Once you have authenticated, you will be prompted to enable the Finder extension:
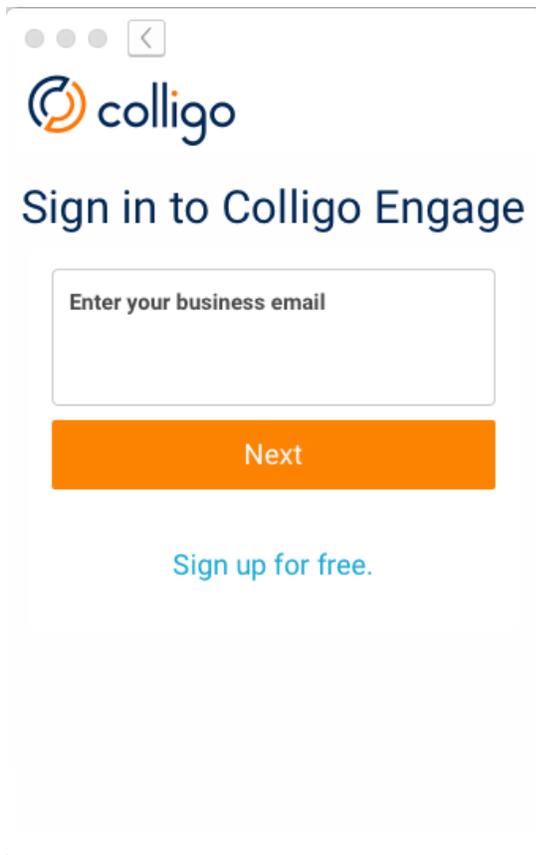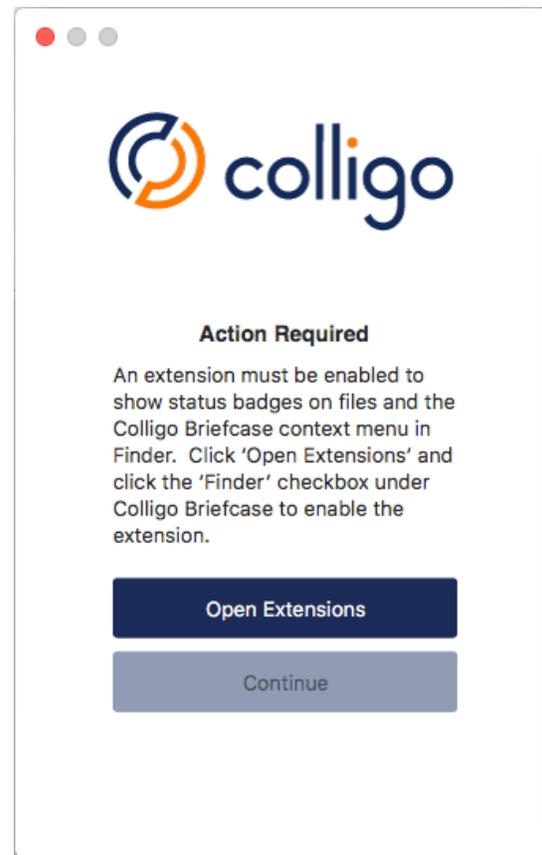

Figure 3: Sign in to Colligo Engage

Figure 4: Enable Finder extension

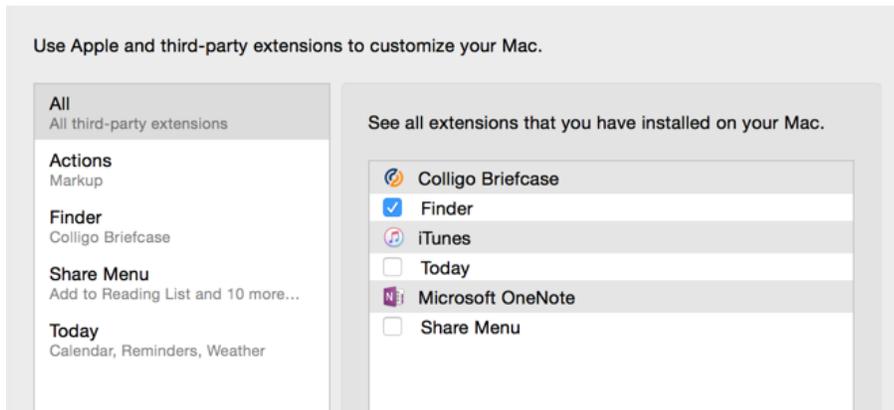Click **Open Extensions** to open the **Extensions** section of the System Preferences.

Figure 5: System Preferences: Extensions

Enable **Finder** as shown in Figure 5. Close the **Extensions** and **Action Required** dialogs.

The next dialog tells you that application configuration is complete and provides you with two options: you may close the dialog box by clicking **OK**, or you can add a site by clicking **Add Site**. Sites can also be added from within Colligo Briefcase. Documentation for adding a site is available in the User Guide.

If configuration data has been configured in Colligo Console, you will be prompted to authenticate with each SharePoint site before content is pushed down to your device.
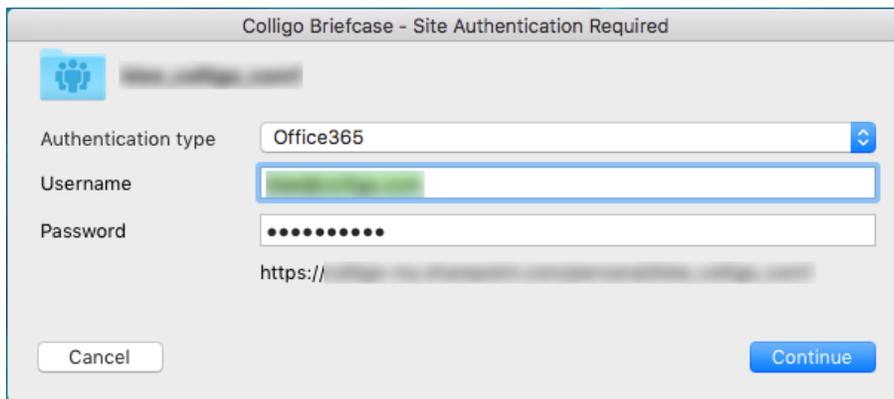

Figure 6: Site authentication prompt

The **Username** and **Password** fields may be pre-filled. Update the **Username** if needed, re-enter your **Password**, and click **Continue** to proceed.

The Colligo logo ⊘ in the top menu bar will rotate ✪ to indicate that a synchronization is taking place.

Uninstallation

Uninstallation will remove the Colligo Briefcase application from your system. Content downloaded from SharePoint will remain on your system in the folder **Colligo Briefcase – Uninstalled <date>**.

The uninstallation process for Colligo Briefcase is straight-forward and the uninstaller will guide you through it. To uninstall Colligo Briefcase:

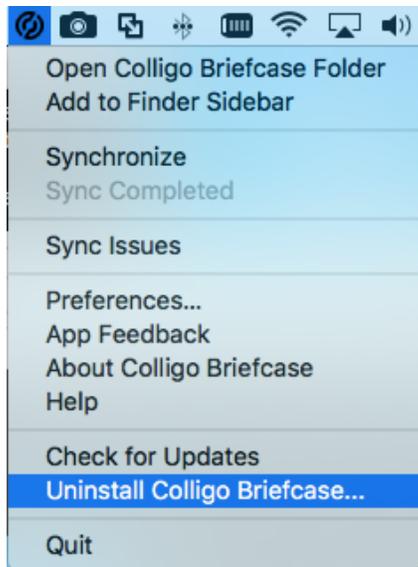1. Click the Colligo logo ⊘ in the top menu bar, and select **Uninstall Colligo Briefcase...**

Figure 7: Uninstall Colligo Briefcase

2. Click **Confirm Uninstall** to confirm that you wish to proceed with the installation.

3. If Colligo Briefcase had been installed for all users of the computer, you will, you will be prompted to enter your Administrator password. Enter the password and click **OK**.

4. The Briefcase Uninstaller will uninstall Colligo Briefcase and will briefly display a message when complete.

5. Colligo Briefcase application has been removed from your system.

The Colligo Briefcase Uninstaller does not delete content downloaded from SharePoint. This content will remain on your system in the folder **Colligo Briefcase – Uninstalled <date>** where **<date>** is the timestamp for when the uninstallation took place. For example, **Colligo Briefcase - Uninstalled 2017-05-05 16-32-56**.