



Repstor affinity™

User Guide - Concepts hints and tips

Product Version 3.1  
November 2015

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## Welcome to Repstor affinity

If you're reading this it's likely that you have just installed Repstor affinity, or it has been installed for you by your I.T. department. This document gives guidance for new users to start using the product. If required more comprehensive documentation is available here: [Repstor affinity Installation and Configuration Guide](#).

Repstor affinity provides on and offline, uninterrupted access to Microsoft® SharePoint® and other systems through the familiar Microsoft Outlook® mail client. It allows you to access content held on SharePoint systems or File Shares on and offline. You can add, view, edit according to any permissions you have relating to the source of the content. It provides document management capability, taking advantage of SharePoint versioning, property management and other functionality while maintaining the familiar Outlook way of working.

## Getting started

### What you need do before you can start using affinity

Before using affinity you need to connect to an information source (repository in our terms). This may already be configured for you (see [here](#) Has your organization already defined a repository/repositories for you?), in which case you can go ahead and start to use the product as described later. If not, then you need to add a connection to either:

- a) A SharePoint location (e.g. your intranet or personal filing area (typically called Mysite), a document library or a specific folder)
- or
- b) A File Share/shared folder

To do this follow the instructions [here](#).

Once you have a repository connected you can start using the software to access, update and file information as part of your day to day activities.

## Some things to note when using affinity

Here are some things that you should keep in mind when using affinity.

### What changes in Outlook?

You will now have access to not just email but document and other content that is located on SharePoint or File Shares while on or offline. You will also find some new options in the Ribbon Bar and in the menus, these new items will help you find, access, update and file information. More details can be found on page 15.

## Initial synchronization of content

Please note that initial synchronization of the content will take place in the background and could take some time depending on the number of folders and items and their size. All of the folders and documents in the folder structure including all sub-folders will be synchronized.

**Tip: If you want to access any particular content prior to the initial synchronization completing, you can navigate the folder structure as for any folder structure in Outlook by clicking on the nodes in the folder pane and each level will be synchronized as you navigate the folder structure.**

## Accessing content

Your content can be found below the top level Repstor affinity folder in the Outlook Folder navigation panel

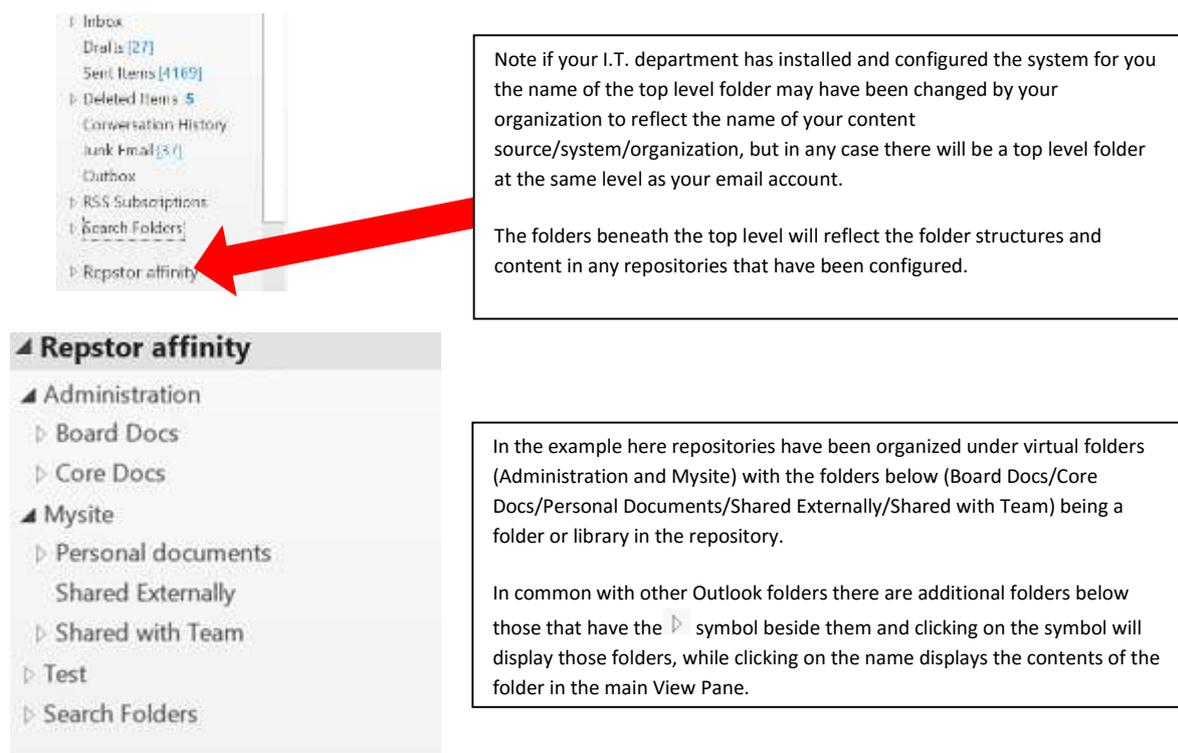


Figure 1 - Where to find your Content

## Keeping content up to date

Repstor affinity keeps content fresh in a number of ways;

### Method 1 - Synchronizing on folder move

Each time you move to an affinity folder that folder's content is refreshed.

**Tip: Think of synchronization being like send/receive for email.**

In the first few seconds after moving to the folder any items that have changed are refreshed (and marked as unread) and any new content added to the folder as unread items.

**Tip: If you are collaborating with others to produce a document, it is sensible to wait a few seconds before editing or viewing any documents that may have been edited by others to ensure**

**that you have the latest version to avoid any editing conflicts - to be sure that the current folder is up to date click away to another folder and then back again.**

Clicking on a folder will also synchronize the names of any new folders beneath that folder (these new folders will be populated automatically in the background or when the folder is opened).

### Method 2 - Background synchronization

Repstor affinity will keep your content up to date by synchronizing any new or changed content in the background on a schedule (default is every hour, this can be controlled via specific settings – see the [installation guide](#).)

### Method 3 - Manually starting a synchronization

While the system will synchronize content in the background sometimes you may want to explicitly refresh the contents of a particular folder or folder hierarchy.

#### Complete hierarchy

To synchronize a complete hierarchy use the Sync now button in the Repstor Status Ribbon.

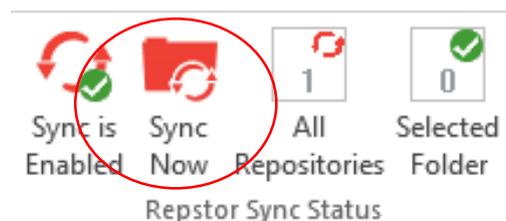


Figure 2 - Sync Now button

This will synchronize the currently displayed folder and any subfolders.

This can also be achieved from the Repstor Tab of the Folder properties.

#### Single Folder

For a single folder simply right click on the folder name in the folder navigation, select Repstor affinity->Queue for Synchronization. This will refresh the folder contents and add any new folders since the folder was last synchronized (just the name not the contents of new folders, clicking on the new folder will synchronize the contents of the new folders).

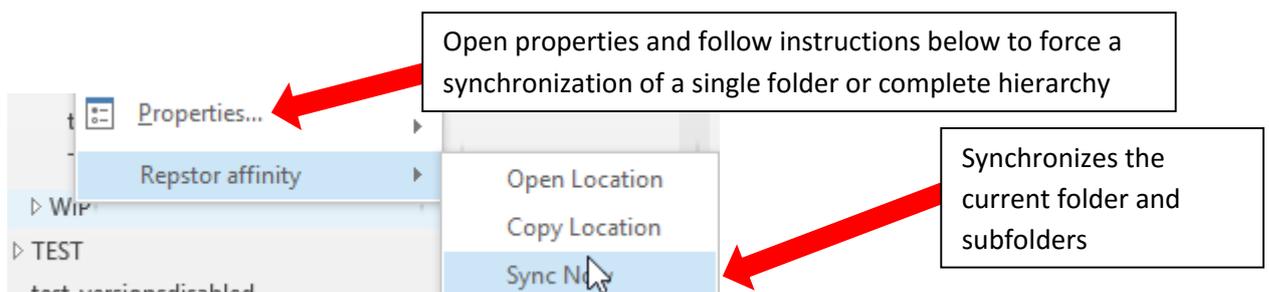


Figure 3 - Sync using folder right click menu or folder properties

## Expiry of content

Repstor affinity has a default of 30 day expiry on content, this means that if a folder has not been accessed in 30 days then the local copy of the files are removed from the local system. This means that over time only the content which is used reasonably regularly is kept synchronized. This setting can be changed in the cache management options to expire content after a longer or shorter period or not at all (uncheck the expiry checkbox).

## When are your changes to documents and other files synchronized?

If you are online and have edited a document or updated properties then these changes are synchronized when you close the application (e.g. Word or Excel) or close the property panel.

If you are offline these changes will be synchronized as soon as possible when the network and repository are available.

**Note that if you are editing an item in an Office application and save the document without exiting the application those changes are saved locally and synchronization only happens after you exit the application.**

When your changes have been synchronized the item will be marked as unread in the main view to signify that that the synchronization has completed successfully.

You can see whether there are any pending changes in the Repstor Sync Status Ribbon.



Figure 4 - Sync Status

This example shows that in the current folder there are no changes awaiting upload or documents being edited, there are 4 items that are either being edited or are awaiting upload in all of the synchronized folders. By clicking on the “All Repositories” button this shows some additional detail and clicking on Pending Changes will display the list of pending changes (these may be items that are currently being edited or items that have been amended and are ready for upload.)

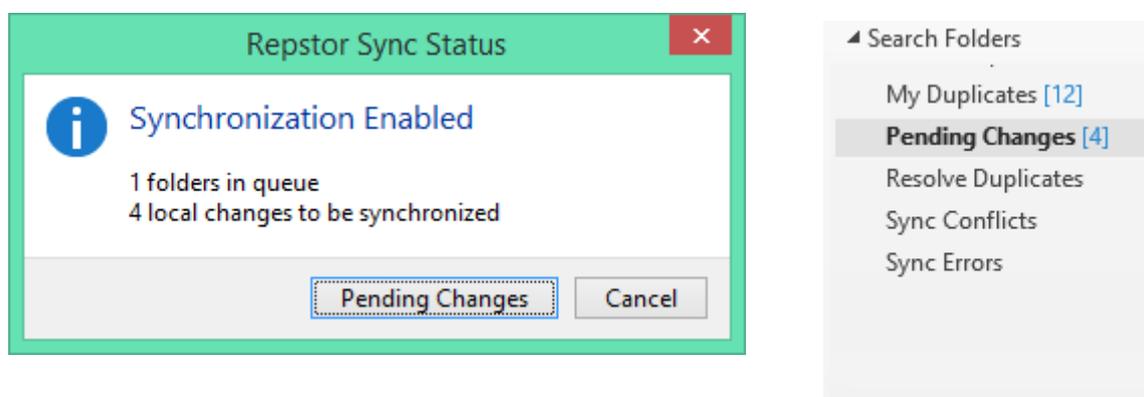


Figure 5- Status detail and search folders

## Repstor affinity - Key Concepts

Repstor affinity has some key concepts that will help you make best use of the software:

### Concept 1 - It works just like Microsoft Outlook

Where possible, affinity works like Outlook, this includes Outlook features/functions such as:

<b>Folders</b> (Navigation, Favorite folders)	<b>Views</b> (Grouping/Filtering/Sorting)	<b>Display</b> (Preview Pane, People Pane)
<b>Emailing Content</b> (Forward/Reply/attach)	<b>Notifications</b> (read/unread)	<b>Ribbons and Menus</b> (Contextual Ribbon menu and right click menus)
<b>Move/Copy</b> (Drag and Drop of items Copy/Paste including multiple item functions)	<b>Search</b> (Find related/hit highlighting/ search scopes/search folders/ property search/has attachment search/date related search)	<b>Folder Creation</b> (if authorized)
<b>Delete</b> (if authorized)	<b>Outlook Rules</b> Outlook Rules/Quicksteps	<b>Conversation views</b> Includes filed items

This means that when you are navigating the affinity folders you can apply all of the above Outlook functions exactly as you would for standard email content and perform actions such as dragging and dropping email or attachments from your inbox to a folder in affinity.

#### affinity and email items – keeping it as you like it

When email is moved to an affinity folder, it remains part of your Outlook environment and is still available in conversation views in your inbox, you can also do all of the same actions that you could do when it was in your inbox, i.e. reply, forward, open or copy attachments, drag and drop attachments and so on. If you have the correct permissions and role you may still also be able to delete or drag and drop it to other locations.

#### Searching

Searching in Outlook has many facets with which users are familiar, all of which are supported by affinity including:

Scope of search	i.e. which areas you want the search to cover that can be set to this folder, this folder and its subfolders, current mailbox, all mailboxes or all outlook items.
Special searches	UNREAD/Sent To/has attachments/subject/from
Date based searches	Today/This Week/and other date based searches (uses the last updated date of the items if they are documents or files other than email)
Advanced Find	Search by properties, including SharePoint properties

## Search Folders

You can define new search folders by right clicking on any of the “Search Folder” nodes that are found in the level below inboxes or the Repstor affinity node and define specific criteria and scopes.

### TIP

Search folders are a powerful tool enabling many different ways of working. Once a search has been defined you can take advantage of views to order, filter and group the items that meet the search criteria, for example it can be used to list only those items filed by you in the last week/day/month grouped by day or folder or type.

## Concept 2 – Now it’s not just about email

Now that you have Repstor affinity you can manage all of your other content in the Outlook client, including Office Documents, PDF’s and much more bringing the [best of Outlook](#) such as [offline working](#) and the familiar Outlook way of working to document management, records management and case document management.

The Outlook way of working remains intact but we’ve added all of the key things that you might want to do with documents, such as view in Word/Excel etc, edit, send as a link, send as an attachment, [help navigate large folder hierarchies and filing, and](#) much more.

## Concept 3 – Work on or Offline

Repstor affinity in common with Outlook (with cache mode enabled) enables users to work on or offline. This means that users can do everything that they could do if connected to the network while offline.

For example they can file email into folders, create new folders for filing and file to them, they can prepare responses to email that they received before going offline, and when the network is available again the changes they have made are synchronized with the Mail server.

With affinity users can file content from email, Office and other sources, and can move or delete documents and/or email within those that have been made available in the affinity folders. They can update properties and essentially do anything that they can do while online. When the network is available again the changes, additions and deletions are synchronized.

So – if you are travelling or for any reason the SharePoint system(s) or File Share(s) is/are not available you can carry on working regardless.

## Concept 4 – Know what has changed

Repstor affinity utilizes the read/unread notifications within Outlook to let you know what content has changed since you last viewed/updated it. This in combination with stored searches allows you to keep track across the entire set of content that you use without having to go look for changes.

Note: On first synchronization all items are marked as new, and it is a good idea once all of the content has been added to Outlook that you mark all of this content as read, from then on any item which changes will be highlighted.

To mark all items as read the quickest way is to add a search folder to **Repstor affinity**->**Search Folders** by right clicking on the Search Folders node, select **“New Search Folder”** and add a search folder for unread mail, setting the Search Mail in option to **“Repstor affinity”**. This creates a search folder called **“Unread Mail”**, this can be renamed in the usual manner to **“Unread affinity items”**.

This folder will then contain all of the items that are marked as unread, and these can be marked as read by right clicking on the **“Unread affinity items”** search folder and selecting **“Mark All as Read”**. From this point on only items that have changed or are new will be highlighted, and this search folder is a quick view of new and changed items that can be added (dragged and dropped) to the **“Favorites”** area for easy reference.

## Concept 5 – Quickly navigating large folder structures for finding and filing

When Repstor affinity is used to connect to repositories, they often have large numbers of folders which can make navigation and filing difficult if the only mechanism to do so were to browse the folder hierarchy. To deal with this scenario, affinity adds two key features to Outlook which work both on affinity and on Outlook standard folders.

### *Jump to Folder*

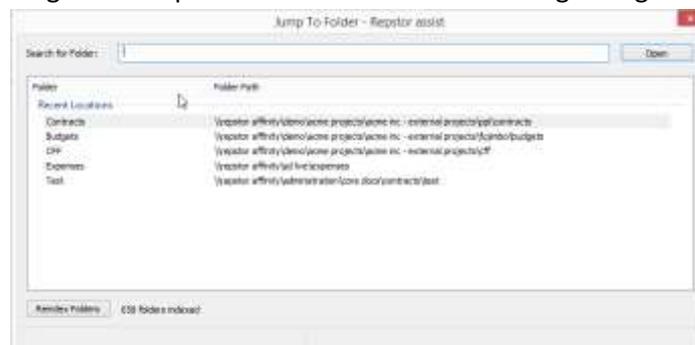


*Figure 6 - Jump to Folder in Repstor assist Ribbon*

*Located at the right side of the Home Ribbon*

Jump to Folder allows users to type in a few letters of the folder path in order to quickly find and open the relevant folder.

On clicking the **“Jump to Folder”** button the following dialogue appears:



*Figure 7- Jump to Folder Dialogue*

This will include recent locations where you have filed information or accessed using Jump to Folder.

By typing part of a folder path – in this case “exp” in the “Search for Folder” box, any folders that have a part of their path starting with exp will be shown as below

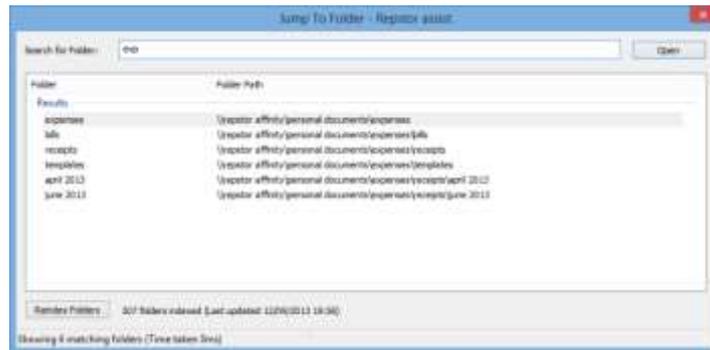


Figure 8 - Filtering locations

By then adding “apr” the results are further filtered and you can if needed continue adding filter terms (minimum 2 characters) until the folder is easily identified, in this case only one folder matches exp apr.



Figure 9 - Refining filter

You can “Jump To” the relevant folder at any time by either, selecting it and clicking on “Open”, or simply double clicking on the folder name/path in the list.

*Quick File and Quick File Attachments with assist and assist lite*



Figure 10 - Quick File in Repstor assist (lite) ribbon

Note: If depending on whether you are licensed for Repstor Assist the icon color and label will vary (Red and Grey for assist and Grey and Red for assist lite).

The Quick File function within Repstor assist and assist Lite works in exactly the same way as Jump to Folder – you first select the email or other item or items that you wish to file to a particular folder location, but instead of jumping to the folder chosen in the dialogue, the selected items will be

moved to that folder. The Quick File function within Repstor assist will also suggest locations where the document or email should be filed based on its content.

Quickfile Attachments will do the same for all of the attachments on all of the selected emails (in this case a copy rather than a move is performed, the original emails are left unchanged).

If you wish to file a subset of the attachments on a particular email you can do by selecting the attachments in the preview and selecting the Quick File attachments option in the right click menu, again the attachments are copied to the selected folder and the original email is unchanged.

## Concept 6 – Adding new content to Repstor affinity folders

### Directly using Add Document

#### Single items

Single items can be added using the Add Document button in Outlook when accessing a Repstor affinity folder. If Content types are configured you may choose any of the allowed types. This will then launch a standard windows explorer window where you can choose a single file. Once the file is chosen then a properties dialogue is displayed where the user can fill out any required properties and if desired change the name of the file.

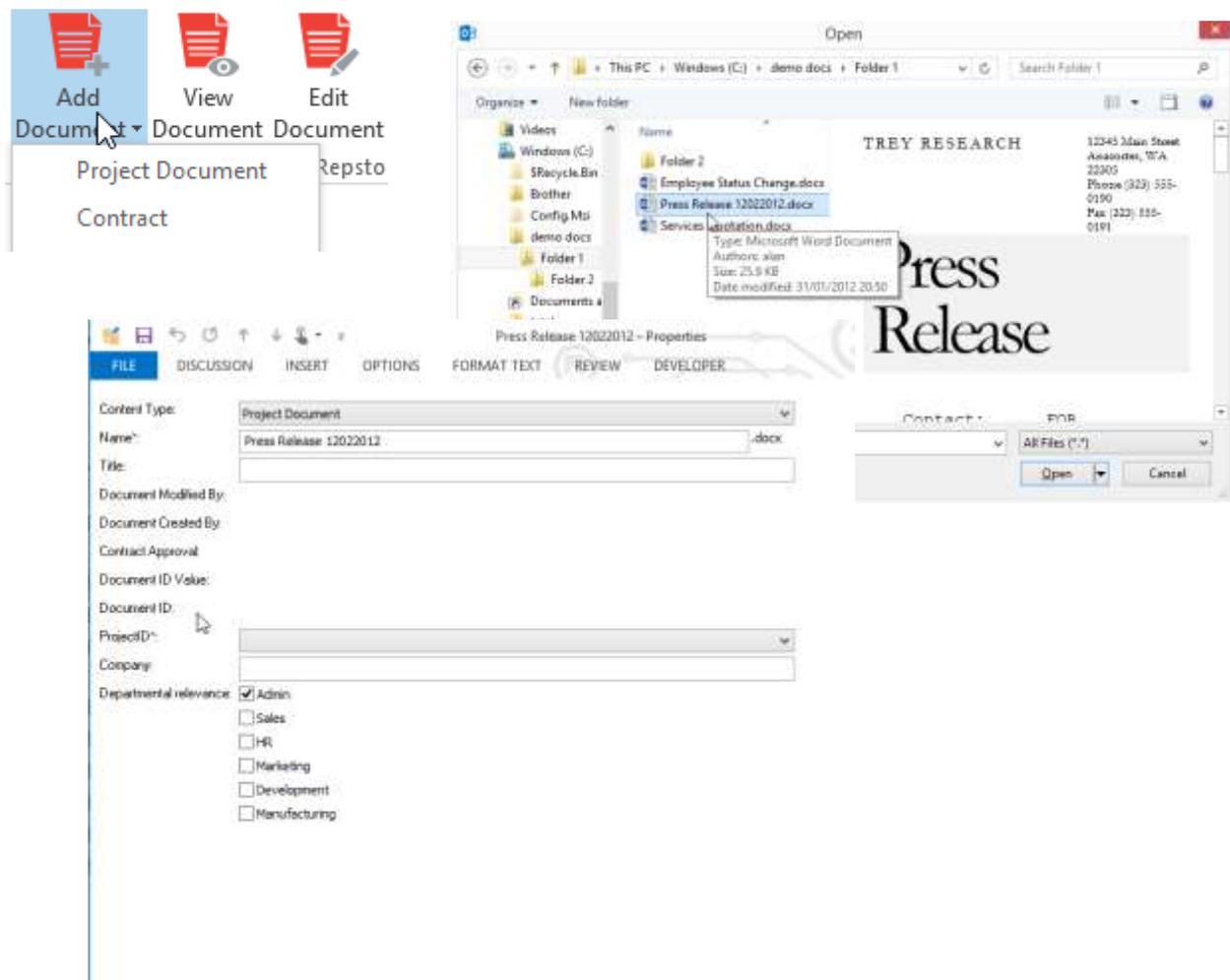
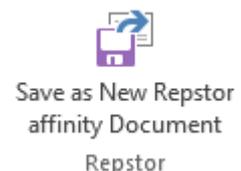


Figure 11- Adding a single file

### Adding content from Word, Excel, PowerPoint

From within the application click on the above button, which will open the Quickfile dialogue as shown [here](#) and the item can be added to the required folder.



## From Outlook

### *Single or Multiple items from Outlook*

Simply select a number of items in the view and use any of the normal Outlook mechanisms to copy or move them to the desired folder location:

#### **Copy**

Right click drag and drop, CTRL-C/CTRL-V or right click copy, then move to the new location and CTRL-V or right click and paste or any similar combination.

#### **Move**

Left Click drag and drop

Quick File can also be used to move multiple selected items (Copy or move behavior is defined by the configuration).

Depending on the set-up you may be prompted with a property form. If mandatory properties are present these must be completed (indicated by a \* beside the property name).

### *Hierarchies of information from Outlook (from standard mail folders)*

Right click on a folder that you want to copy or move and choose copy folder or move folder and follow the normal process to select a target location in Repstor affinity. Large hierarchies may take some time to synchronize back to the SharePoint system

## From the Desktop

### *Single or Multiple items from the desktop*

Simply select a number of items in the view and use any of the normal file mechanisms to copy them to the desired folder location:

Right click drag and drop, CTRL-C/CTRL-V or right click copy, then move to the new location and CTRL-V or right click and paste or any similar combination.

Depending on the set-up you may be prompted with a property form. If mandatory properties are present these must be completed (indicated by a \* beside the property name). If large numbers of items are added the default is to allow the addition without any property dialogue.

### *Importing Hierarchies of information from the desktop*

You can add entire hierarchies of files and folders from the desktop by right clicking on the target folder within the Repstor affinity folder hierarchy in Outlook (i.e. the folder where you want the imported content to be located), selecting Repstor affinity->Import Folder. This opens a standard Windows explorer window where you can select a folder for import. This will then add all of the contents of the folder and any subfolder structures and files to Repstor affinity for synchronization to SharePoint.

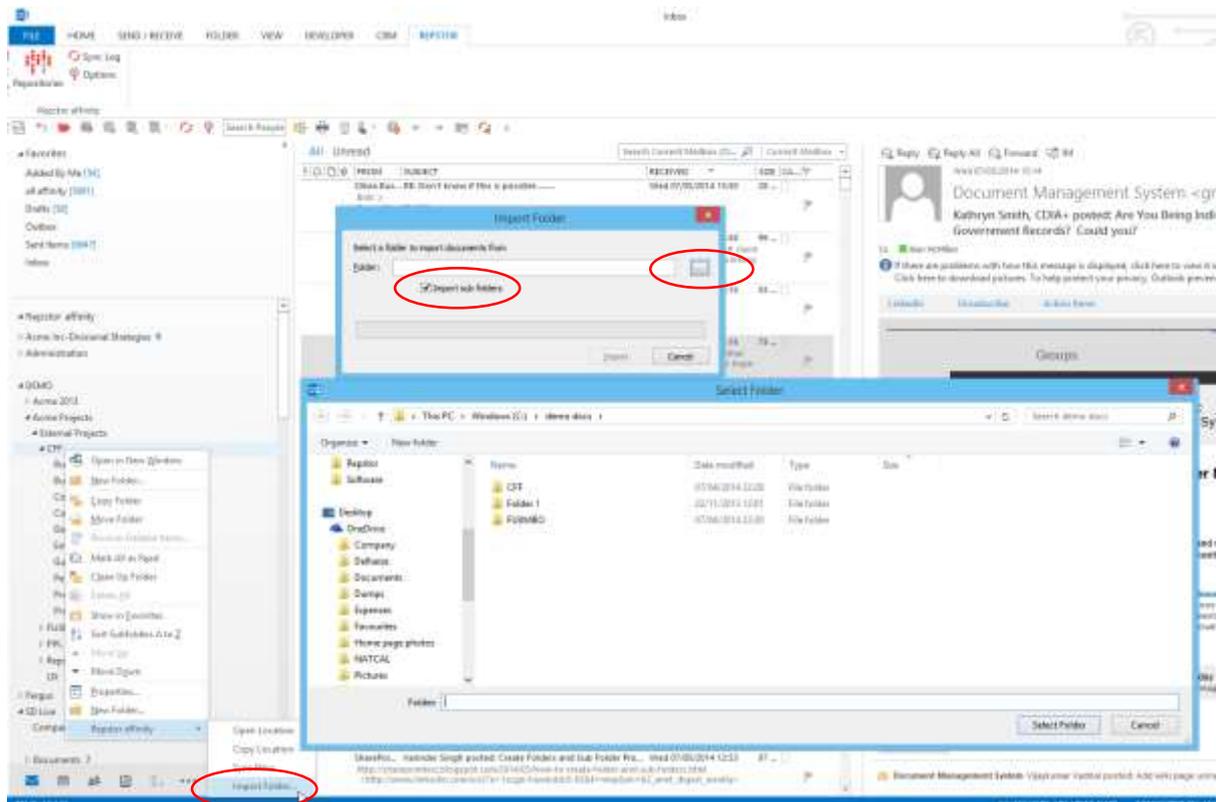


Figure 12- Importing Folders from the desktop/fileshares

## Repstor affinity hints and tips

### For Content filers

Quick File and Jump to Folder are excellent ways of making filing quicker easier and more accurate, and descriptions of these can be found [here](#).

### For Document creators

Creating new documents from Templates.

If you have a set of document templates, you can create a new document with that template by simply copying and pasting the template to the folder where you want the new document to reside. All of the normal Outlook copy mechanisms can be used (CTRL-C/CTRL-V, Drag with right click and copy and paste from the menus), or you can open the template and use the **Save as a new Repstor affinity Document** button to save the new document to the desired location.

### For Managers

To keep track of when key documents are updated, use the search folder functionality to add a search folder to the standard search Repstor affinity-> Search Folders node to show unread items or items updated in the last x days that searches across the Repstor affinity content and adds it to you favorites.

## For everyone

### *Quick refresh of a folder*

Click on Synch Now – this will check for updates and refresh the current folder and it’s subfolders.

### *Check what is synching*

You can check what is being synchronized by opening the Sync Log (Repstor Tab).

### *Check when a folder was last refreshed*

You can see when the folder was last synchronized by hovering over the Selected Folder button in the Repstor Synch Status ribbon or checking the Repstor tab in the properties of the folder (Right Click->Properties).

### *Use recent folders list to quickly navigate to recently filed content or quickly file to the same location*

The recent folders list in Jump to Folder or Quick File includes any folders that you have quick filed to or jumped to recently, so if you file an email or document using Quick File you can then quickly file additional items to that folder or open the folder by clicking Quick File or Jump to folder – the last location will be at the top of the recent list.

### *Add Repstor functions and forward and back buttons to the quick access bar*

By adding Repstor buttons and back and forward buttons you can quickly navigate the folder structure, as well as file access and update your files.

### *Send Links to documents or folders instead of documents*

If you want colleagues to review documents send them a link instead of the document or if you want them to access a folder send the location of the folder (you can do this by right clicking on the folder and selecting Repstor affinity->copy location and then paste it into your message).

### *To access SharePoint Locations use “Open Location”*

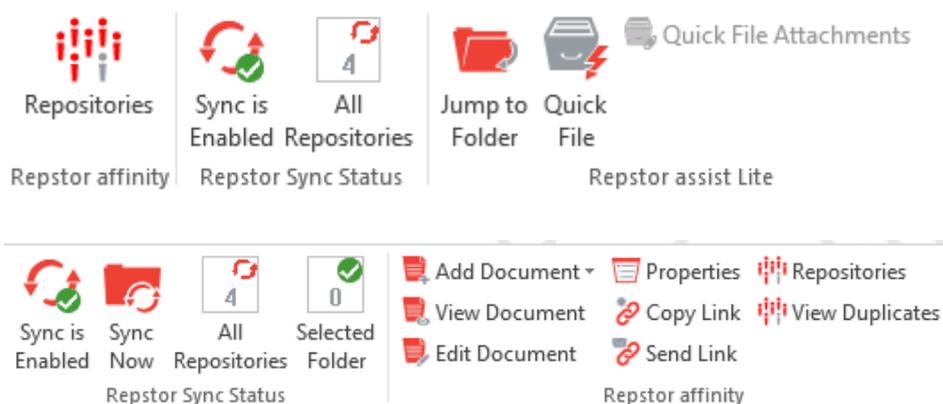
To open a browser that will show the source location for a folder right click on the folder and choose Repstor affinity->Open Location.

### *Organize your folders to suit how you work*

Put a little bit of thought into how best to organize your folders, it will make life easier for you.

## Repstor affinity Menus and Ribbons

### Home ribbons



The Home Ribbon when navigating standard mail folders

There are additional options when an affinity folder or item is selected

Figure 13 - Home Ribbon

## Individual Functions

### **Repstor affinity**

- *“Add document”* – allows users to add documents to the selected affinity folder (supports content types). You may be prompted to fill out properties depending on the configuration.
- *“View Document”* – opens document/file in view only mode in the associated application.
- *“Edit Document”* – opens document/file in edit mode in the associated application.
- *“Properties”* – opens the property pane for the currently selected item(s). (Note you can set properties on multiple items using this feature).
- *“Copy Link”* – this will place a link to the clipboard that can be pasted into documents or emails to allow readers to open the item (if they have access to the system and sufficient security permissions).
- *“Send Link”* - this will create and launch a new email with a link to the document included in the body of the email.
- *“Repositories”* - this will open the repository management function (allows users with sufficient privileges to add/remove/configure repositories).

### **Repstor Sync Status**

- *“Sync is Enabled /Sync is Disabled”* – shows the allowed sync status. If disabled no synchronization will happen, if enabled synchronization will happen according to the configuration and user actions. Clicking the button toggles the status.
- *“Sync Now”* – available only when sync is enabled, will add the current folder and it's subfolder structures to the sync queue
- *“All Repositories”* – Shows the number of local documents that are waiting to synchronize to the server or are being edited across all synchronized folders, clicking on this button will show more detail of the status, as will hovering over the button.
- *“Selected Folder”* – Shows the number of local documents that are waiting to synchronize to the server or are being edited within the currently selected folder clicking on this button will show more detail of the status, as will hovering over the button.

### **Repstor assist or assist Lite**

- *“Jump to Folder”* – allows users to quickly identify and “jump” to folders in the folder hierarchy (includes email and affinity folders).
- *“Quick File”* – Allows users to quickly find the correct location and file single or multiple items that location.
- *“Quick File Attachments”* – Enables users to quickly find the correct location and file single or multiple attachments to that location.

## Repstor Ribbon



Figure 14 - Repstor affinity Ribbon

“*Repositories*”- as with the Home ribbon, this will open the repository management function (allows users with sufficient privileges to add/remove/configure repositories).

“*Sync Log*” – this opens the Synchronization log which shows synchronization activity.

“*Options*”- This opens the Options dialogue which allows configuration of notifications, background synchronization, Central Repositories List and access to Advanced settings which include allowing deletion (required to enable moving content), display of queue information in the sync log, expiry setting, reset of the connect to Outlook feature and search folders and enabling of diagnostics.

## Repstor assist – Repstor Ribbon

If you have Repstor assist installed there are additional options available in the Repstor ribbon

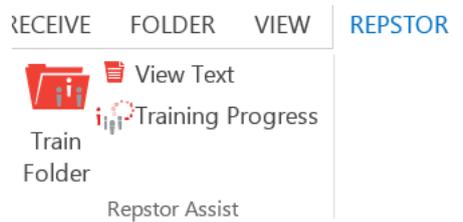


Figure 15 - Repstor assist ribbon

“Train Folder”- this will analyze all of the content located in the selected folder and its subfolders.

“View Text”- this will display the text that is present in the selected message that is utilized for training/categorization by the assist product.

“Training Progress”- opens the training progress dialogue to show if training is taking place and it’s status or shows the date and time that the last training process completed.

## Right Click Folder Menu

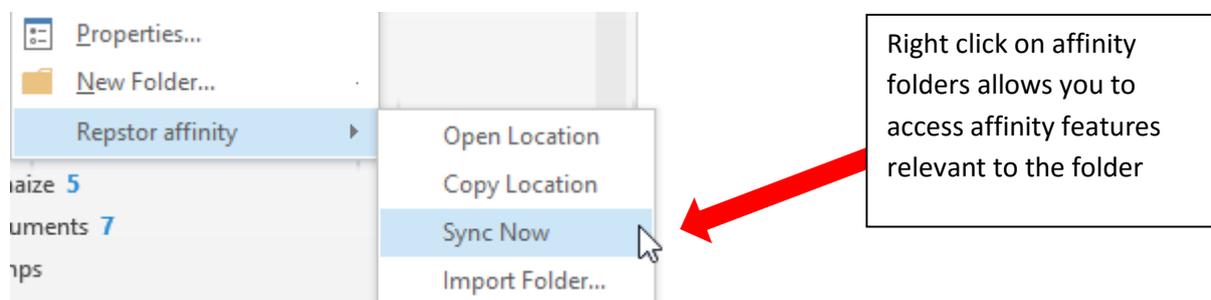


Figure 16 - Folder right click menu

“Sync Now” – this places the selected folder and it’s subfolders to top of the queue for synchronization.

“Copy Location” – this copies the URL of the source location on the clipboard.

“Open Location” – this opens the source (SharePoint/other) in a browser.

“Import Folder” – this opens the import Folder dialogue to allow import of folder hierarchies from the desktop/fileshares.

## Repstor affinity “how to’s”

### Adding information sources to Repstor affinity

In the same way that email accounts can be added to Outlook, additional information sources (repositories) can be added for synchronizing content into the Outlook folder hierarchy under the affinity top level folder that is created when Repstor affinity is installed.

#### Do you have enough rights to add repositories?

Depending on your company’s use of affinity you may be able to add additional repositories to your Outlook environment, to check if this is the case click on the Repositories icon found in the Repstor ribbon and if the add function isn’t greyed out then you can are able to do this.

#### Has your organization already defined a repository/repositories for you?

In many cases your I.T. department/management may already have added content repositories to your configuration. If this is the case then the Repstor affinity top level folder will have a ▲ symbol next to it signifying that folders exist below that level, you can browse the repositories that have been added as you would for any other Outlook folder.

To add your own repositories there are different options depending on where the content is located:

### Adding SharePoint Repositories

To manually add SharePoint document libraries or folders as repositories in Repstor there are two options:

1. In the web browser use **Connect to Outlook** from the SharePoint Library Ribbon (this will add the currently viewed folder or document library to the repository list.

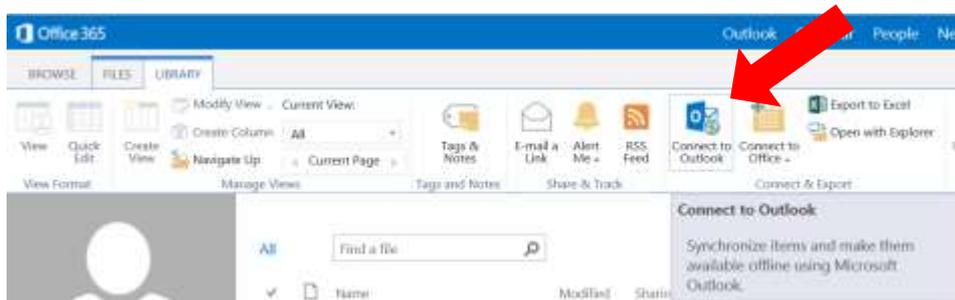


Figure 17 Adding a Folder or Document Library from SharePoint 2013 using Connect to Outlook



Figure 18 Adding a Folder or Document Library from SharePoint 2010 using Connect to Outlook

2. In the Web browser use the Connect to Repstor affinity menu item.

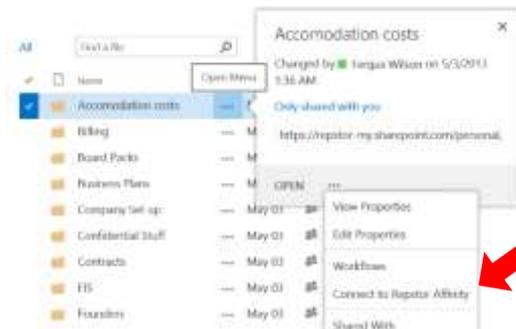


Figure 20 Adding a folder as a repository from SharePoint 2013

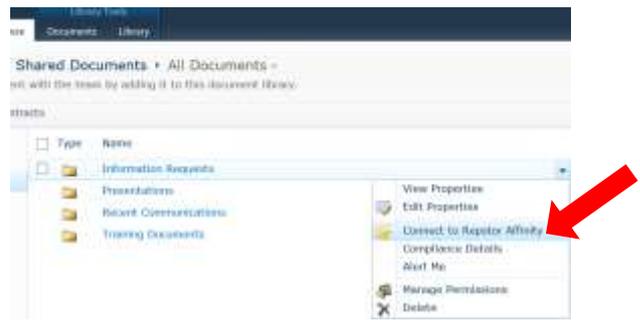


Figure 19 Adding a folder as a repository from SharePoint 2010

When using any of the above options, you will be prompted to confirm that you wish to add the repository.

3. Use the Repositories function from the Repstor affinity Ribbon in Outlook

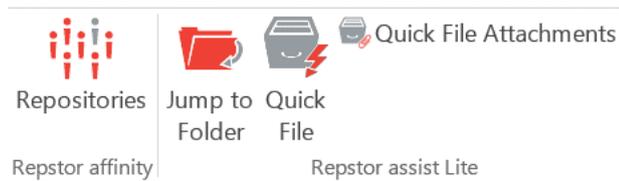


Figure 21 - Repositories button

**Repstor affinity - Manage Repositories**

Search for Repository to Add
Add
Remove

Name	Location
Active	
publicfolders-shared documents	http

**Add Repository**

Add the new repository to manage.

Type: SharePoint

Location:

Name:

Parent Group (optional):

Download Preferences: Inherited

OK Cancel

*If search is enabled, you can search for repositories to add. This will fill in the Add Repository dialog automatically from the results.*

*Alternatively*

**Type = SharePoint**  
 Location = URL of the Folder/Document Library or SharePoint List(Copy and paste from the browser), usually similar to the following: <https://Organisation/sitename/Documentlibrary/foldername/Allitems.aspx>

**Or**

**Type =File Share**  
 Location = UNC Path of the File Share or File Share folder (can be copied as text from the address bar when the desired location is opened in the file explorer usually of the form : \\filesharename\foldername\)

**Name**  
 This will be auto-populated from the URL but may be set to a friendly name if needed (this will be the name of the folder/document library that appears in Outlook.

**Parent Group**  
 This is the virtual path that will be created below the Repstor for affinity Node under which the repository will be displayed. See

Figure 22 - Adding a repository

## Organizing your repositories

### Configuration of repositories by individual users

Repstor affinity allows users with sufficient privileges to organize repositories in a virtual folder hierarchy, so that related information can be grouped together. For example if a user manages a number of Projects those projects can be gathered together under a Projects folder and given appropriate names to designate the Projects themselves.

**This can be achieved using the Repositories function by populating the Parent Group entries with the desired virtual folder structure when the repositories are configured.**

In the example below “Administration” and “Mysite” are virtual folders, “Board Docs”, “Core Docs”, “Personal Documents”, “Shared Externally” and “Shared with Team” are locations (folders or document libraries) that contain content synchronized from central systems (SharePoint/Fileshares).



Figure 23 - Example of virtual folders

### Centrally configuring repositories and virtual folders

Sources can also be configured centrally to ensure users have access to important content such as corporate policies (e.g. Health and Safety) template documents (e.g. expense claims) and similar, as well as connecting users with content specific to their work tasks (e.g. projects/customer engagements/legal matters). These can be configured to be displayed in virtual folder structures so that related information can be grouped together, for example a project manager may have a virtual folder called Projects which includes individual folders (shown below) for each of their projects that are automatically populated when they are given access to the project content on the server.

More information regarding setting up central repositories can be found in the [installation guide](#).

## Using Properties and Views

### Properties

If you are connected to SharePoint, as well as synchronizing the documents and files, all of the properties associated with those files are also synchronized. This is also true for lists in SharePoint (e.g. in project scenarios this might include tasks/deliverables/issues and so on).

An example of a useful property is the content type if these are configured in your SharePoint system (e.g. is it a contract or a policy document or an email), or specific information that is useful for that document (for example if it is a contract – properties might include when the contract ends, or when it needs to be reviewed).

These properties can be added to the Outlook view using the standard Outlook view configuration options. The properties associated with any individual folder's content can be found under "User defined fields in folder" area when using the Outlook field chooser (available in the right click menu for the header in the main view), or the columns chooser in the view settings (available from the View ribbon). Once the properties are in the view they can be used to order, group or filter the items in the view again using standard Outlook functionality.

### Changing/Updating Properties

Users with sufficient privileges may update properties on single or multiple items by selecting the item(s) and then clicking on the Properties button in the Repstor affinity tab on the home ribbon. Where multiple items are selected only those properties which share the same value will be pre-filled, any changes that are made will apply to all of the selected items.

### SharePoint and Outlook Views

As well as making the properties available any views that are defined on a SharePoint location are made available in Outlook. The behavior of views can be configured in the Repstor options which can be accessed from the Repstor Ribbon. A specific view can be created in SharePoint for use within Outlook and the view name configured in the View options. There are also options to include or exclude sort group and filter settings from the SharePoint views. This means that all users can benefit from views defined on the SharePoint system that display the content in specific orders/groupings and with the important properties available without the user having to configure views in their Outlook setup.

### TIP

Check what views have been defined for any particular folder content by clicking on the Change View button in the View ribbon, you may find a view that presents the content just how you need it.

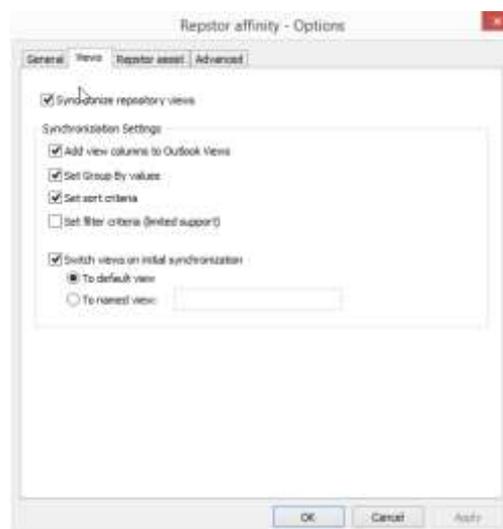


Figure 24 - View settings

## Dealing with Conflicts (this can happen if users are working offline)

When users work offline it is possible there may be more than one person working on a document. When this happens conflicts may occur (where a user has made changes to a document based on an earlier version than the one now available from the server), the first upload will be accepted as a new version. When the next user attempts to upload the same document based on a version earlier than that available from the server they are notified of the conflict in the Sync status ribbon, on the item in the list and when selected in the preview window as shown below.

Clicking on the “Selected Folder” button will provide access for the user to the specific document(s) that have a conflict.



Figure 25 - Conflict notified in Main view

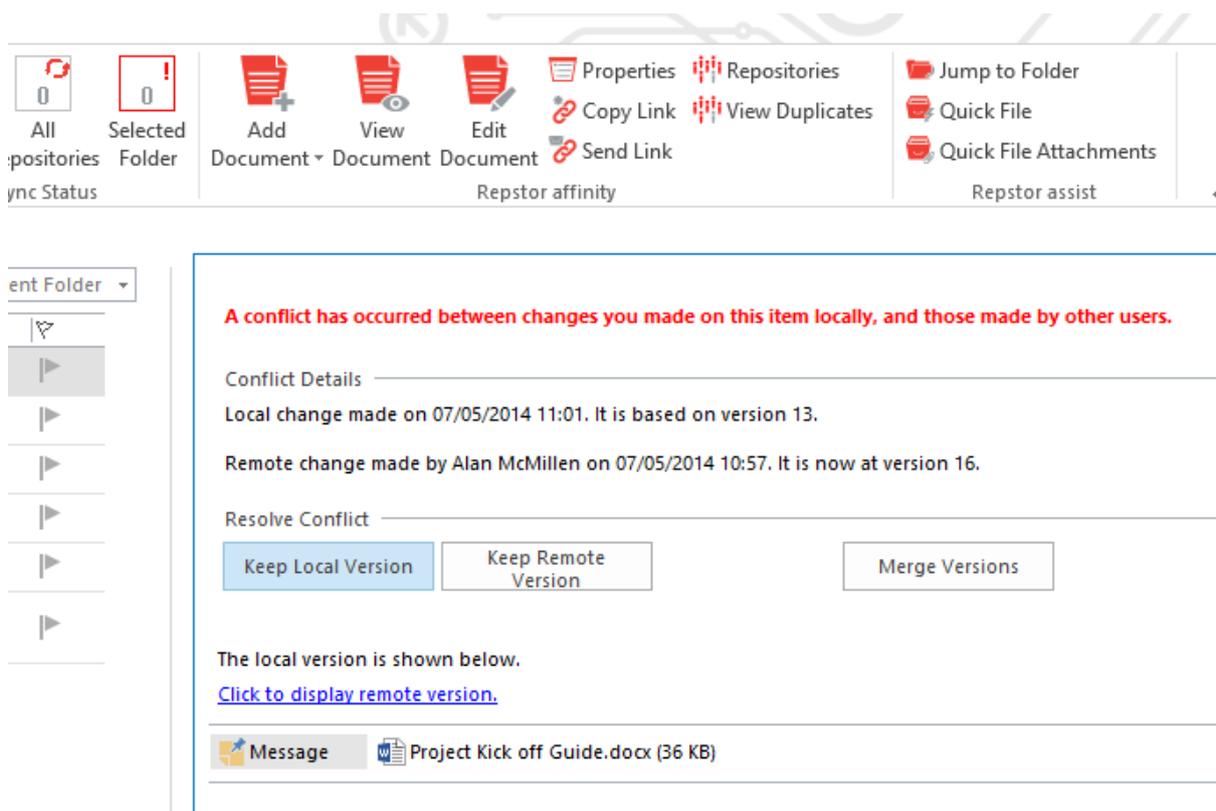


Figure 26 - Conflict notification in the ribbon and conflict message with resolution options

By clicking on the “Click to display remote version” you can review the changes made by the other user, for resolutions see below.

## Options for resolution

### Keep Local Version

If this option is chosen, the Local Version (the version just created by the current user) is added as a new version replacing the version updated by the other user. The other user's version will still exist providing versions are enabled on the source location.

### Keep Remote Version

If this option is chosen the changes made by the current user are **discarded** and the version saved by the remote user remains on the server and is synchronized.

### Merge Versions (Note – only available for supported applications)

This option is only available for supported applications (currently Microsoft Word only). If this option is chosen, Microsoft Word opens and shows the merged document with marked up changes along with the source documents as shown below.

If Word is closed without changes then the merged version with marked up changes will be saved and synchronized.

If the user makes any amendments (e.g. accepts the merged changes) when closing the document they are asked if they want to save changes, selecting "Save" will save the merged changes and any other amendments, if "Don't Save" is selected then the merged document will be saved as it was displayed on opening. Once closed the document is synchronized (if working online) to the server.

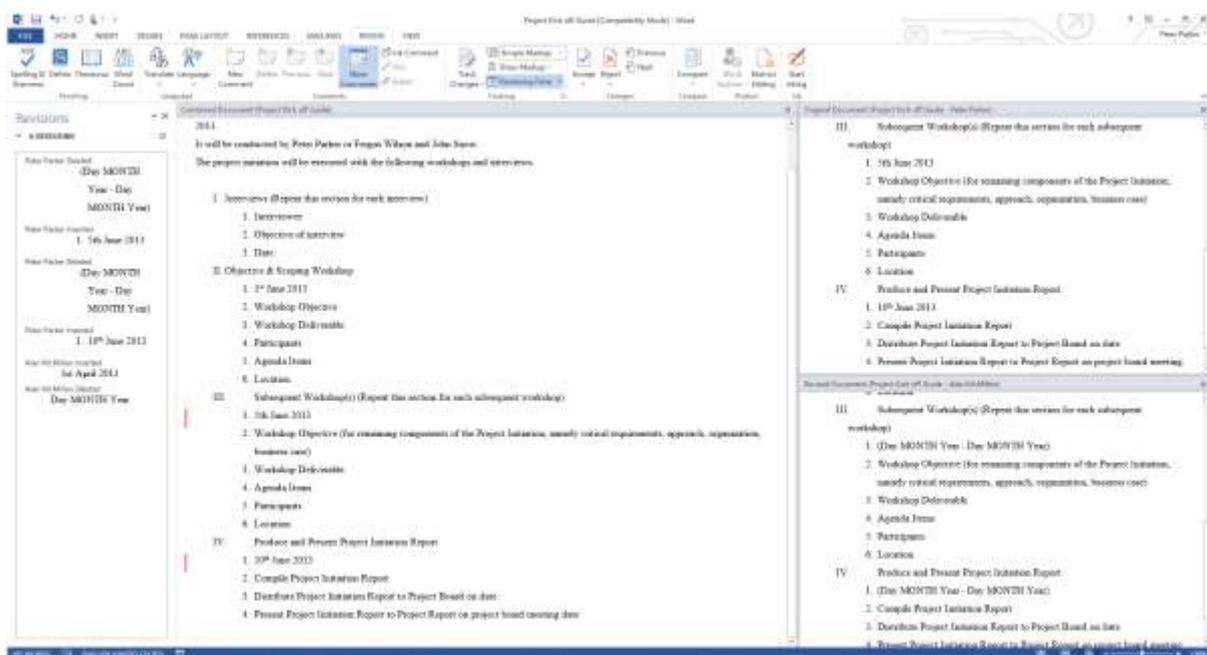


Figure 27 - Word Merging version conflicts

## Glossary

Term	Definition
Repstor affinity™	The Repstor software product.
Repstor assist lite	Part of Repstor affinity that provides quick location of folders using jump to folder and quick filing
Repstor assist	The Repstor assist module that provides suggested filing locations for Quick File
Repository	A central system that stores electronic documents, typically a shared filestore or SharePoint document library or folder.
SharePoint	Microsoft server product that is widely deployed in organisations to provide document management, collaboration and other functions and which can be an affinity “repository”.
File Share	A network drive or similar that is configured to provide access for users from their desktop or other systems.
Synchronization	This is the activity carried out by the software to ensure that cached copies of files and documents and any files or documents created locally by the user and held locally on the users system is synchronized with the server (master copy).