Repstor custodian™

User Guide

Contents

Welcome to Repstor Custodian

If you're reading this it's likely that you have just installed Repstor custodian, 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 Custodian Installation and Configuration Guide.

Repstor custodian is a case management application that allows users to effectively manage case documents providing on and offline, uninterrupted access to Case and other Content through the familiar Microsoft Outlook® mail client. It allows you to access content held in case files on SharePoint systems and content from File Shares or other supported repository while on and offline.

You can add, view, edit according to any permissions you have relating to the source of the content.

There is document management capability, taking advantage of versioning, property management and other functionality while maintaining the familiar Outlook way of working.

Please note that in this document we use "Case" or "Cases" as a general term – in your deployment this may be "Matter"/"Matters" , "Engagement"/"Engagements" or other case type – this naming is configured by the system administrator.

We use "Clients" to denote the aggregation of "Cases" – so you may for instance configure a different use for this aggregation – e.g. Team/Customer/Site or other way to group cases to meet your needs.

Repstor Custodian software components

Custodian is made up of a number of separate but integrated components - Users interact with the components of Repstor custodian as follows:

Repstor custodian APP – Used for configuration of custodian

- Used by authorized users for creating new "cases"
- Used for selecting which "cases" should be displayed within Outlook
- Used by administrators to configure the system (Installation and configuration are dealt with in the Repstor custodian installation and configuration guide)
- Accessible from the appropriate SharePoint site or directly via a URL.

Repstor custodian APP part – provides access to case selection and creation within SharePoint pages/sites

- The custodian APP part can be added to sites on SharePoint and will show the current users "case" configuration (i.e. which cases have been selected to be available in Outlook) and allows users to search across the cases to which they have access.

Repstor affinity Client – provides access to "case" content from the Outlook client – also provides access to create "cases"

- Adds functionality to the Outlook Client to enable custodian "Case" management
- Users can file and retrieve documents email and other content relating to a "Case"
- Users can also access non "Case content" that is held on SharePoint and other systems'

Repstor assist client – provides assisted filing so that users can quickly and easily file "case" content to the system from within Outlook and the Microsoft office applications.

- Users are presented with suggested locations for filing email and other content based on what is being filed and the existing filed content
- Rules are automatically generated and kept up to date
- Users always have the final say on where the items are filed

The Repstor custodian APP

"Case" template and other configuration, "Case" creation and "Case" selection
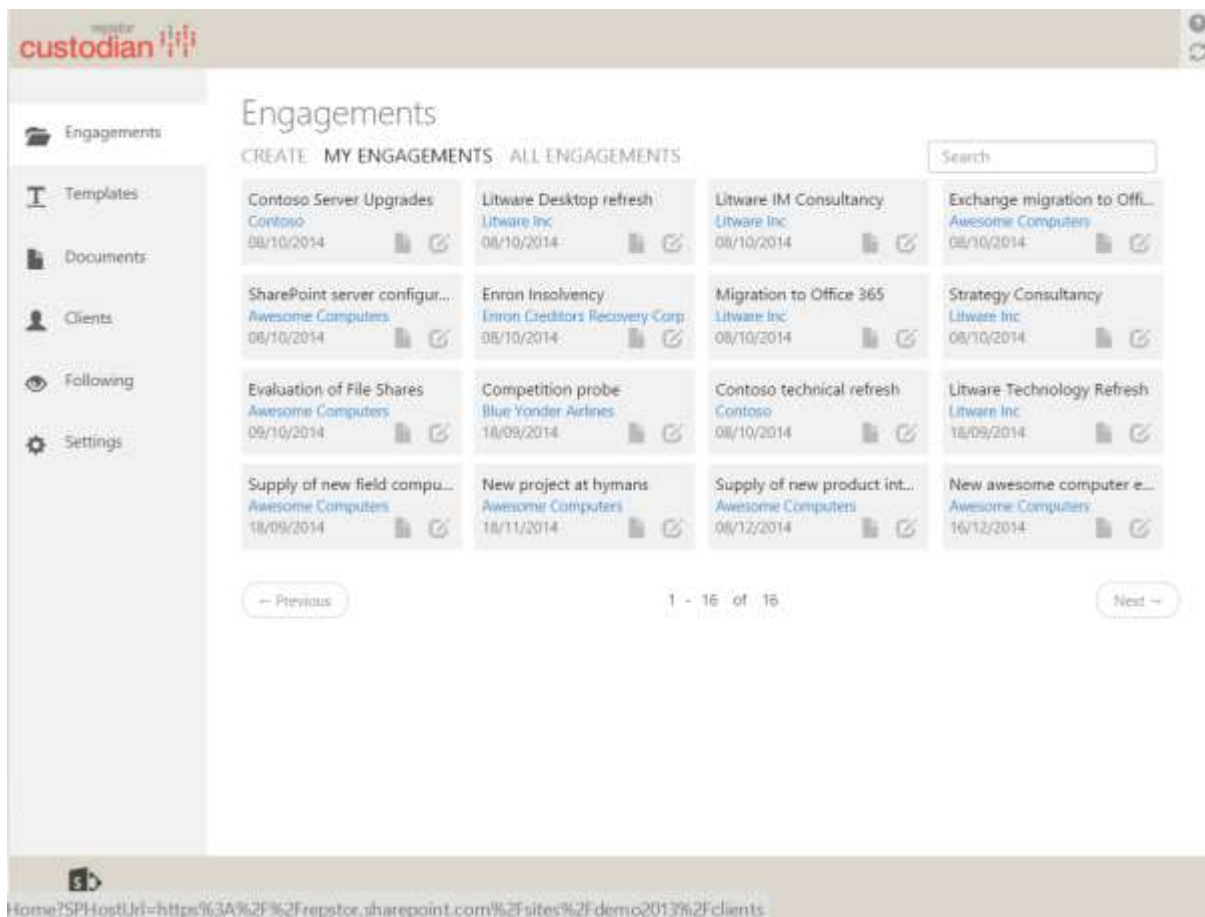
The Repstor Custodian APP is the part of the product that allows administrators to define different "case" templates and is also used to create new "cases" based on those templates. It also defines how "cases" are grouped and named.

The template definitions can include specific libraries, folder structures, properties, content types pre-existing documents and define which template documents are available creating new documents.

Access to the APP is via links on the APP site which will be configured by the user that installs the software. This is a standard SharePoint site that can be tailored to meet specific requirements, and will have a link to the custodian APP and there are also APP parts that can be added to the site to give access to "cases".

Use of the Repstor custodian APP for defining templates and configuring the system is covered in the Repstor custodian installation and configuration guide.

The creation of "cases" can be initiated either directly from the APP or from the Outlook client using the Create "case" button which is normally displayed in the Repstor affinity ribbon.

Repstor affinity - Access to case content in Outlook

Repstor affinity provides access to "cases" that have been creating using the custodian APP (it also provides access to other content such as SharePoint libraries/folders/lists, Shared Drives, OneDrive Consumer, OneDrive for Business and other content sources such as HP Worksite systems and HP Trim / RM systems (for a full list please contact Repstor from the enquiry form here or contact your service provider if you have purchased Repstor through a Repstor partner.
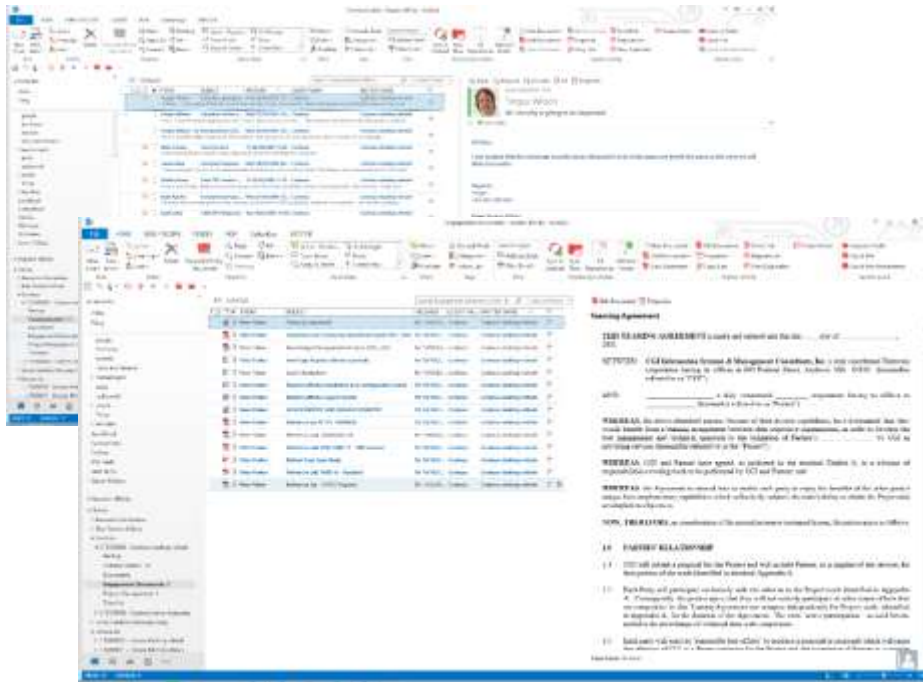

Figure 2 - Documents and email in Case folders(can also be mixed)

More information on the configuration and use of Repstor affinity can be found in the Repstor affinity documentation.

Repstor assist - Assisted Filing

Repstor assist provides suggested locations when filing email and other case related content. This allows users to quickly identify the correct filing location for email or documents by providing quick search for folder locations and suggested filing locations as well as displaying recent locations.

The assist Quickfile feature can be invoked both from the menu or when viewing or editing an office document

On clicking on the "Quickfile" button in the menu, or "Quickfile attachments" when viewing an email or the "Save as New Repstor affinity document" button when in the office applications, the Quickfile dialogue is opened and any suggested locations and recent locations presented, the user can then choose one of these locations to file the item to, or may enter an alternative location by typing parts of the folder path.
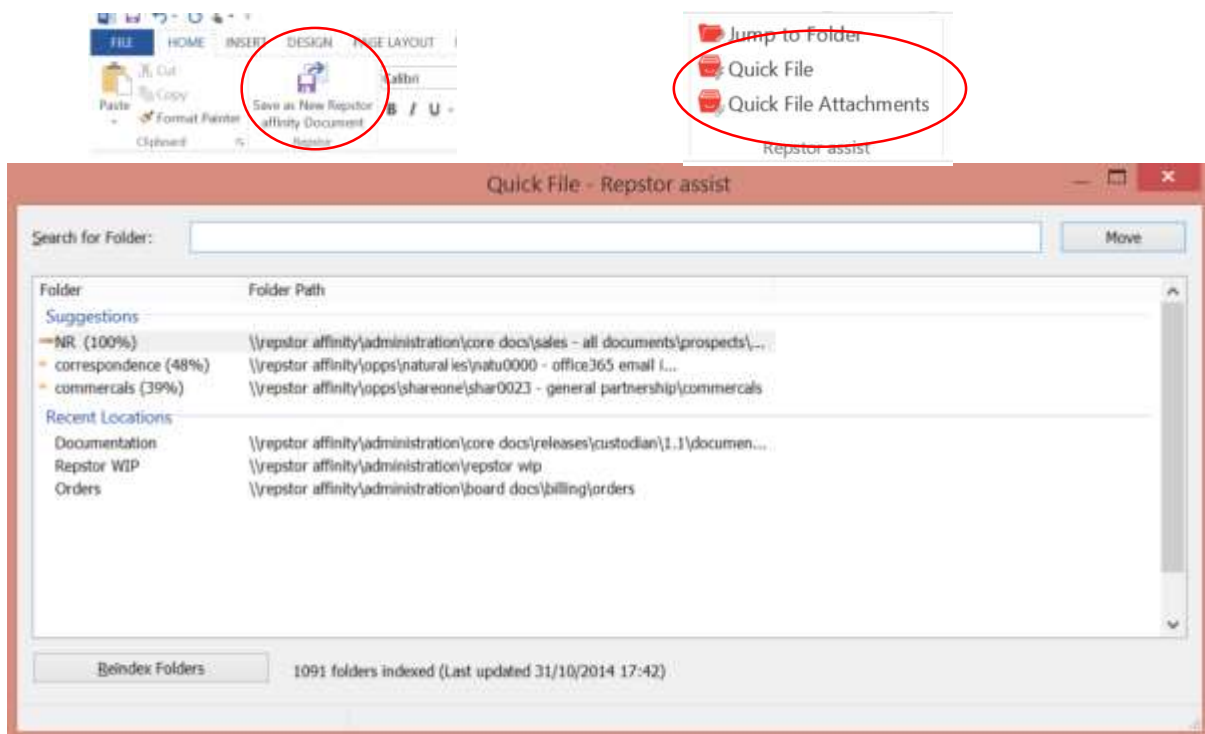
Figure 3 - Repstor assist suggested and recent filing locations

More information on the configuration and use of Repstor assist can be found in the Repstor assist documentation.

Getting Started - Repstor custodian general user concepts

"Case" selection – deciding which "Cases" are displayed in Outlook

Repstor custodian allows users to select which cases should be displayed in Outlook. Adding and removing cases is straightforward and this can be accessed either through the SharePoint user interface or via the Outlook menus opening the custodian APP as follows:

NB. Removing "cases" from Outlook does not delete any content from the server, and "cases" can easily be reinstated in Outlook.

Selecting cases from Outlook

Within Outlook "Cases" are displayed in a structure defined by the administrator, this can vary from system to system depending on the nature of the "cases" being managed
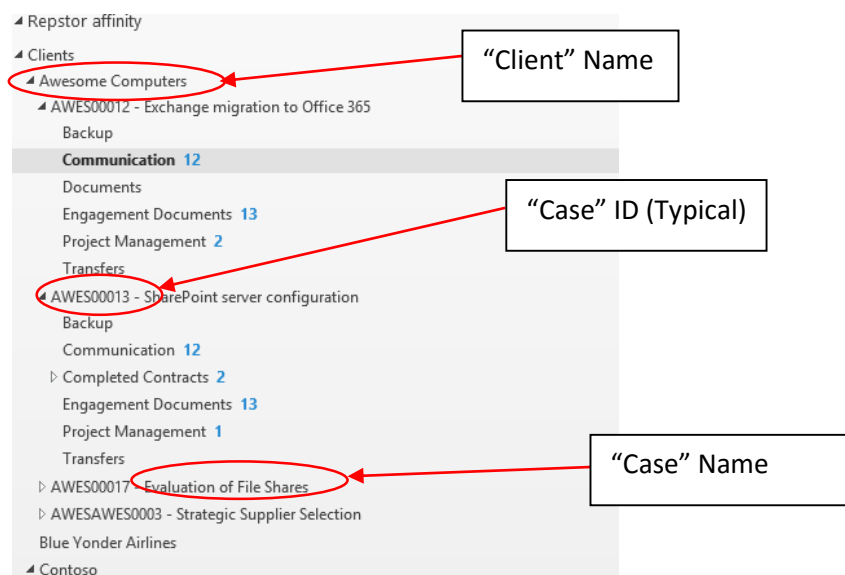
Figure 4 – Example "Case" folder structures in Outlook

In order to choose which "Cases" should be displayed, the user can access and use the APP as described in the previous section or can do the same thing by clicking on My "Cases" in the outlook ribbon (Figure 5). This will open the custodian APP with the same UI as shown in Figure 7 and the user can then select which cases should be displayed in Outlook. The custodian APP is described in more detail in the next section.

Note: The button names as shown in Figure 5 may be customized.

Figure 5 - Create "Case" and My "Cases" 'Buttons

From there users can remove "cases" from Outlook by clicking on the ✖ symbol which appears on hovering over a specific "Case", and may add cases by clicking on the All "Cases" tab and clicking on the pushpin symbol 📌 which is present on all "Cases" not currently included in the Outlook view.
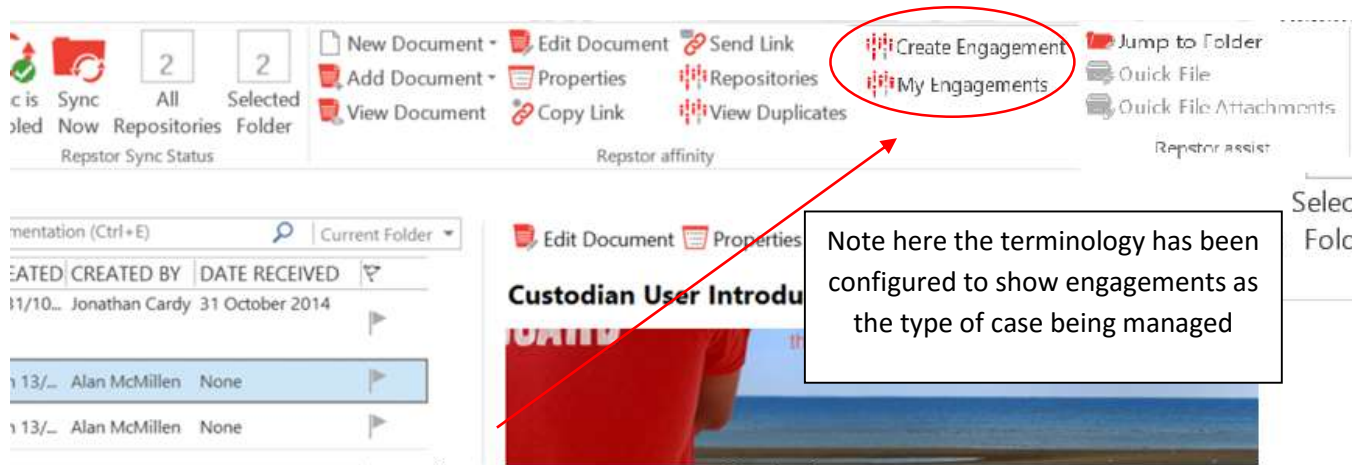
The relevant cases can be found using the search facility which will filter the "cases" as characters are typed taking account of the name of the "Client" or the name of the "Case". Users can restrict the search to a particular client by clicking on the name of the "client" and then running the search.

 An advanced search option is also available which allows users to find "cases" etc. using any of the available metadata elements (including user defined fields).

As the user selects or deselects "Cases" the Outlook environment will add or remove the "Cases" from the folder hierarchy.

Custodian APP

The custodian APP can normally be opened from the main SharePoint site where it is installed. The Custodian web interface is used by administrators to configure the system and is also used by standard users to decide which "cases" are available from the Outlook UI and to create new "cases" if this is a manual process and they have the appropriate permissions.

Access to the custodian APP web user interface is typically via a link on the home section of appropriate SharePoint site menu but may be configured differently by your IT department.

Users may select which "cases" they want to be available in the Outlook client from either the APP or the APP part shown below.

Custodian APP part

If you or your administrator has added the custodian web part to a site in SharePoint you can access your "cases" directly from that web site as shown below.
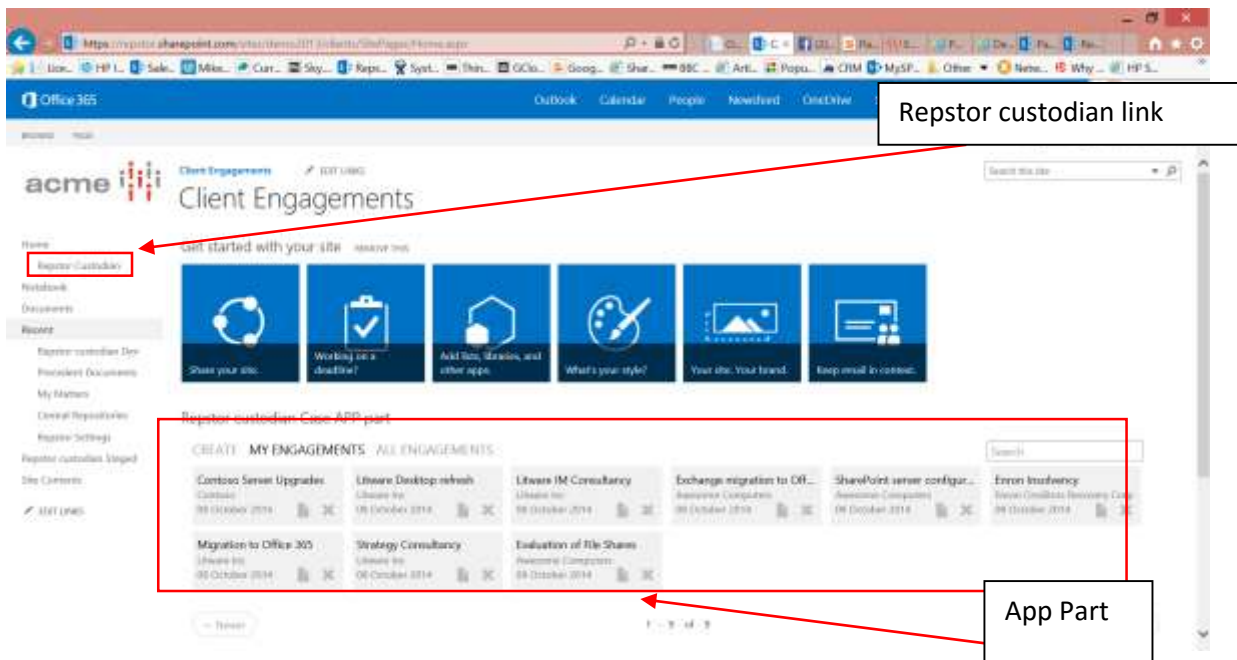

Figure 6 - SharePoint Site with access to custodian and the App part deployed

My "Cases" Tab

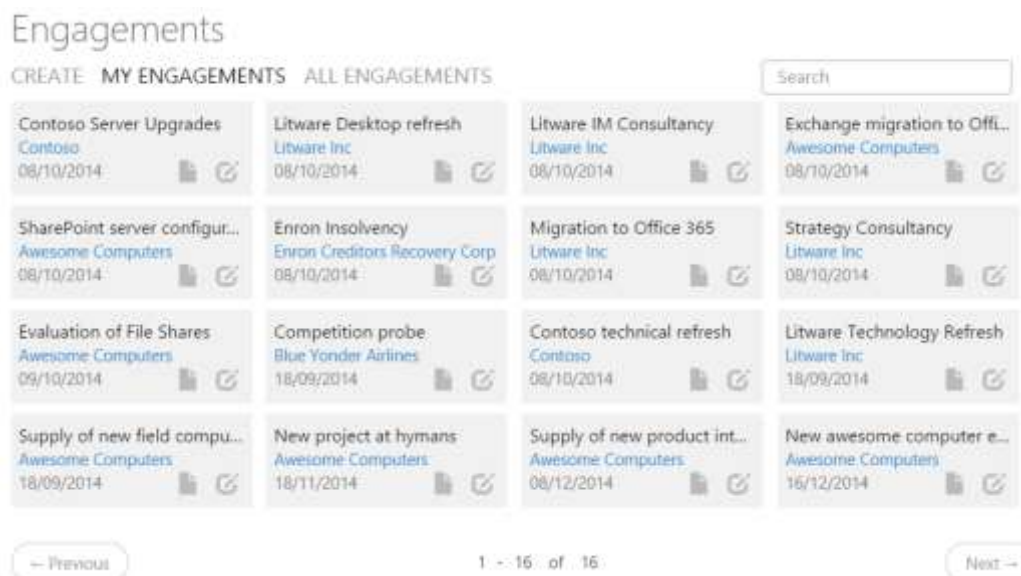This tab shows the "cases" that will be visible in Outlook for the user

Figure 7 - My "Cases" in the custodian APP part

Actions available:

Click on:

The name of the case to open the individual case

Contoso Server Upgrades
Contoso
08/10/2014
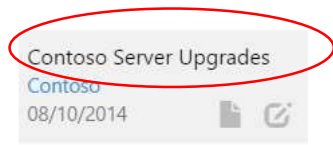
The name of the "Client" to show all cases related to that client

Contoso Server Upgrades
Contoso
08/10/2014
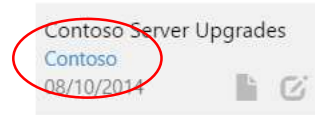
The edit symbol to update the case (e.g. to add or remove interested parties)

Contoso Server Upgrades
Contoso
08/10/2014
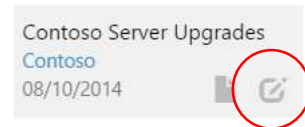
The document symbol to display/manage what " Document Templates" are assigned to the case

Contoso Server Upgrades
Contoso
08/10/2014
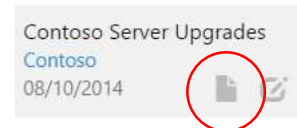
"Cases" may be removed by clicking on the ✖ symbol which appears when hovering over the "case"

Enron Insolvency
Enron Creditors Recovery Corp
08/10/2014

Migration to Office 365
Litware Inc

Remove from My Engagements
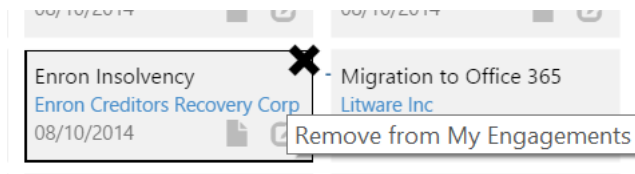
All "Cases" Tab

This tab shows all of the available "cases" that the current logged in user has access to.
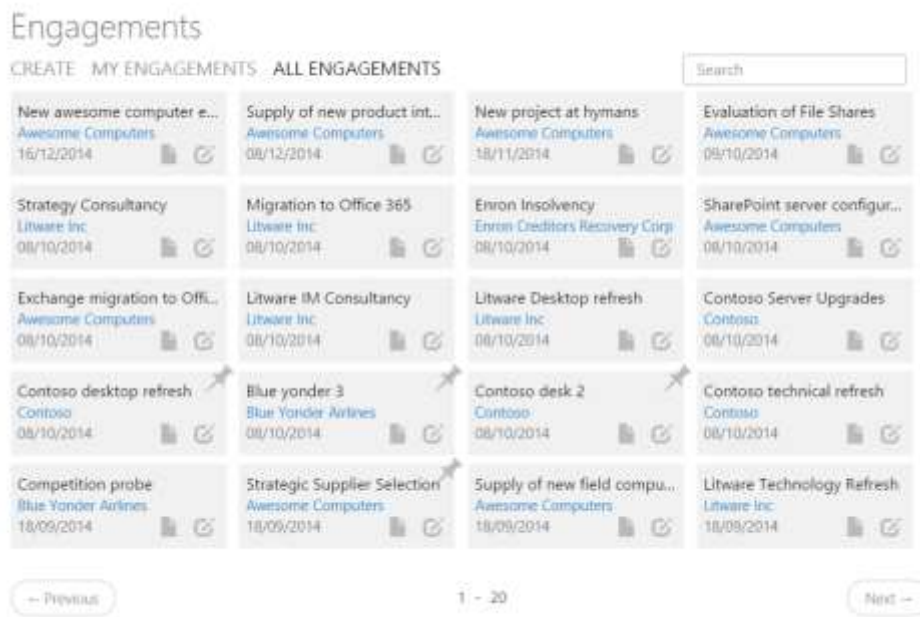
Figure 8 - All "Cases"

"Cases" may be added to My "Cases" and pushed to Outlook by clicking on the ![pin] symbol
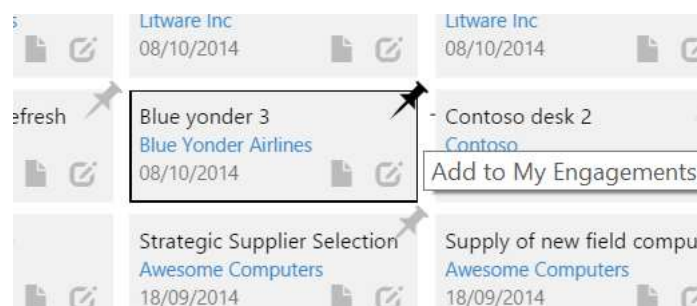
Figure 9 - Pin a case (adds case to My Cases and pushes to user's Outlook)

Users can search for specific "Cases" or "Clients" by simply typing in the search box, and the results are filtered as the user types the characters.

If the user makes any changes these are then reflected in Outlook with any "cases" that have been deselected being removed from Outlook and those that have been selected being added to the outlook folder structure.

Creating New "cases"

If "Cases" are to be created manually, users who are authorized to create new "Cases" can do this either from the custodian APP or from the Outlook menu Create "Case" button which will open the create "Case" page within the custodian APP.

New "cases" can be created based on the "case" templates configured by the administrator. "Case" Templates may have additional properties associated with each "case" which are set in the properties tab as described below. Additional properties may be added prior to the "case" being generated.

Templates may also include "documents" which are deployed as document templates available when working with the cases. Additional "documents" may be added from those configured on the system prior to the "case" being generated.

Figure 10- Creating a new "Case"

New "Case" DETAILS

Basic case details When Creating a "Case" the user must set a number of dropdown entries and complete a case name, and depending on the template chosen there may be additional properties to be completed.

"Client":	Choose from the dropdown or create a new "client" if the "client" required is not in the list. Creating a new client may depending on configuration create a "Client" site that can be used to store general information about the "Client".
Title:	This is a descriptive name for the specific "case", for example in a legal department scenario this might be "ACME Acquisition" or "ACME Contract renewal"

Template: This is the template that will be used to create the "case" folders and other relevant "case" settings, for example in a legal setting this might be "Contract renewal" or "Corporate Acquisition" or similar. This will also define what properties and "documents" that are available for a "case"

Interested Parties: This contains a list of users or groups of users that will be given access to the case when it is created and will have the case surfaced in their Outlook client.

New "Case" Properties

When Creating a "Case" once a template has been chosen, clicking on the **Properties** tab will display any properties defined in the template and allow these to be completed.
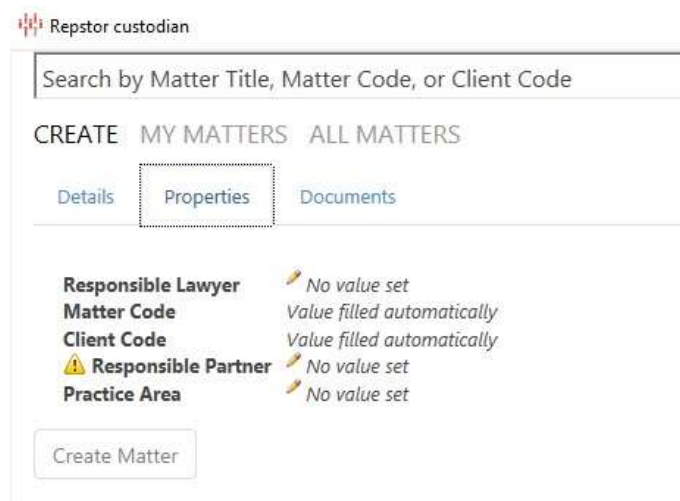
Figure 11 - Properties Tab when creating a new "Case"

To set the properties to a new value, click on the ✏ symbol on any of the properties where the value is not system generated – this will open a property window for completion. Once complete click on "Save" as shown below in Figure 13.

NB :If any of the properties are mandatory then the Create "Case" button will not be enabled until the mandatory properties are completed (these are identified by clicking on properties and any mandatory properties are denoted with a Hazard triangle as shown below.
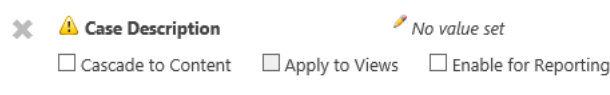
Figure 12 - Mandatory properties denotation
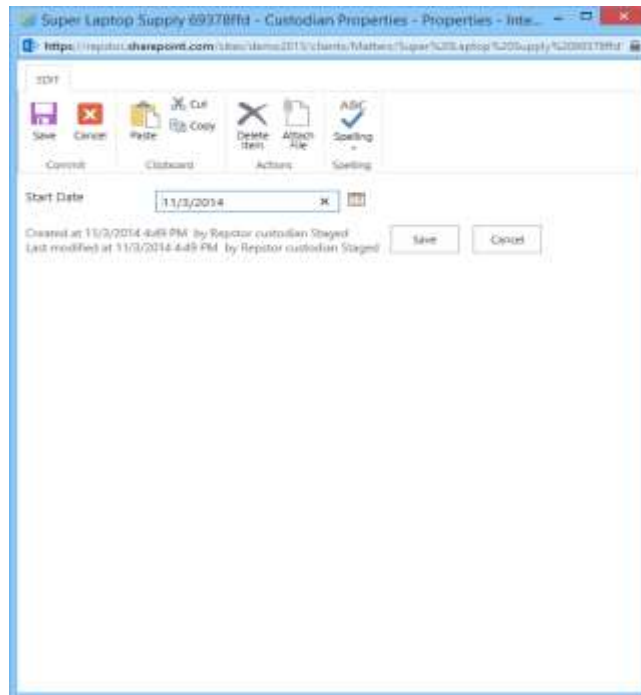
Figure 13 - Completing Properties

New "Case""Documents"

Note that the terminology may be customized so "Documents" may be set to display an alternative such as Templates or precedents depending on the scenario.
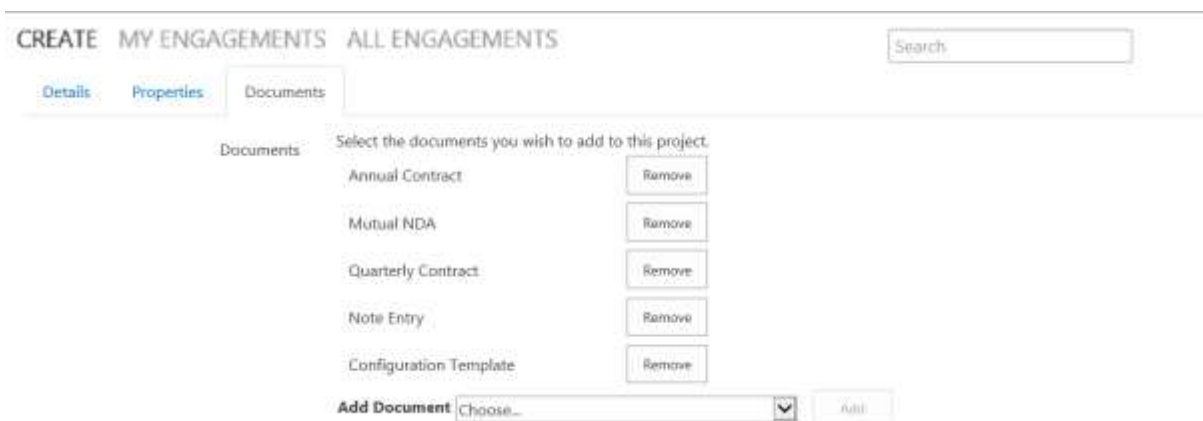
"Documents" are document templates that can be accessed by users to create new documents based on those documents/templates.

A new document based on these templates is generated when the user clicks on the new "Document" button in the Repstor affinity ribbon in Outlook and provides a name for the new document.

When clicking on the "Documents" tab the list displayed will be the "Documents" that are associated with the "Case" template, and any other available templates can be added by choosing them from the Add "Document" dropdown.

Using Repstor affinity and Repstor assist to access and file Repstor custodian "case" content.

When Repstor affinity and assist are used with Repstor custodian users can easily access and file "case" content that is then available to other users with permission to access those "cases".

There are a number of key concepts that are utilized in these products when working with custodian, and these are described below.

Concept 1 - It works just like Microsoft Outlook

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

Folders (Navigation, Favorite folders)	Views (Grouping/Filtering/Sorting)	Display (Preview Pane, People Pane)
Emailing Content (Forward/Reply/attach)	Notifications (read/unread)	Ribbons and Menus (Contextual Ribbon menu and right click menus)
Move/Copy (Drag and Drop of items Copy/Paste including multiple item functions/Move)	Search (Find related/hit highlighting/ search scopes/search folders/ property search/has attachment search/date related search)	Folder Creation (if authorized)
Delete (if authorized)	Outlook Rules Outlook Rules/Quicksteps	Conversation views 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 it's 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 custodian/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 – It's not just about email

With Repstor affinity you can manage all of your other "case" 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 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 (other than creating new cases).

For example users 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 send and file those items, and when the network is available again the changes they have made are synchronized with the Mail server and filed in the case management system.

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 Case Management /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 custodian, there are often large numbers of folders related to the cases, 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 14 - 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.

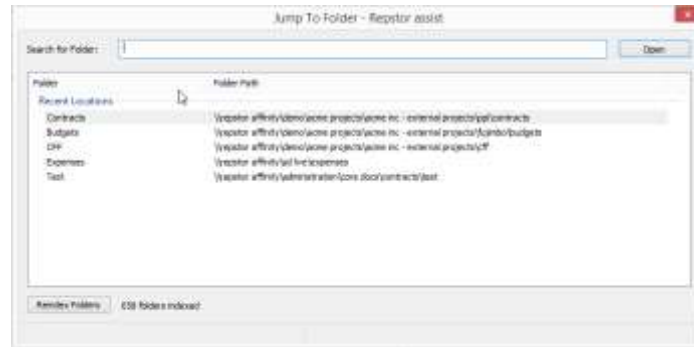On clicking the "Jump to Folder" button the following dialogue appears:

Figure 15- 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(for example a case reference or client name – in this case "awe" in the "Search for Folder" box, any folders that have a part of their path starting with awe (in this case awesome computer cases) will be shown as below
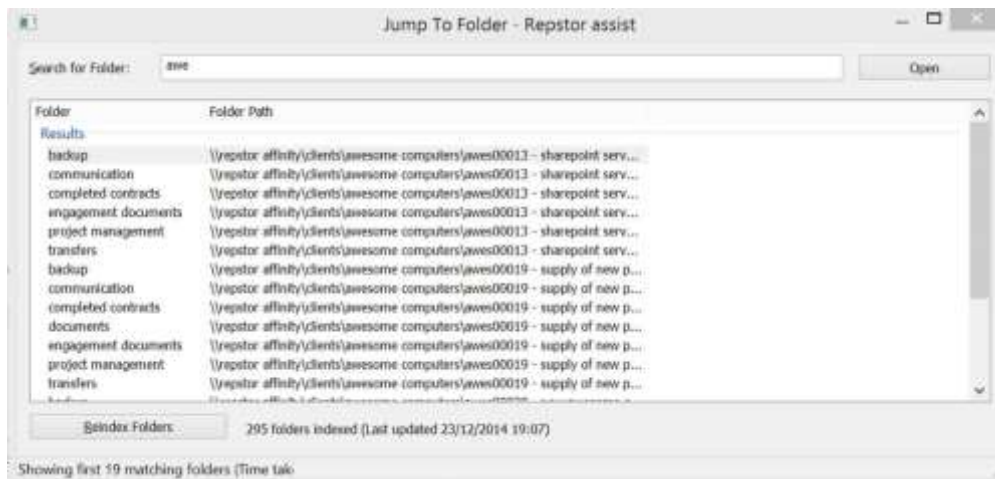

Figure 16 - Filtering locations

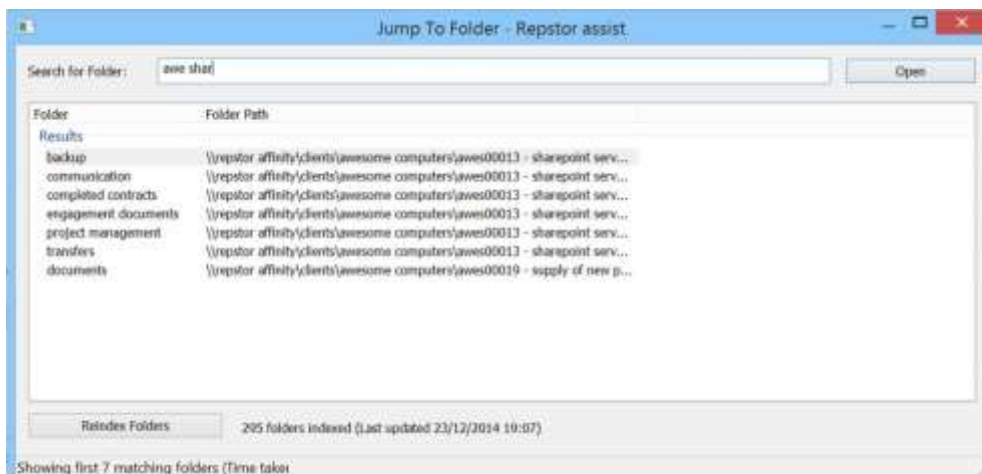By then adding "shar" the results are further filtered

Figure 17 - Refining filter

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 awe shar comm.
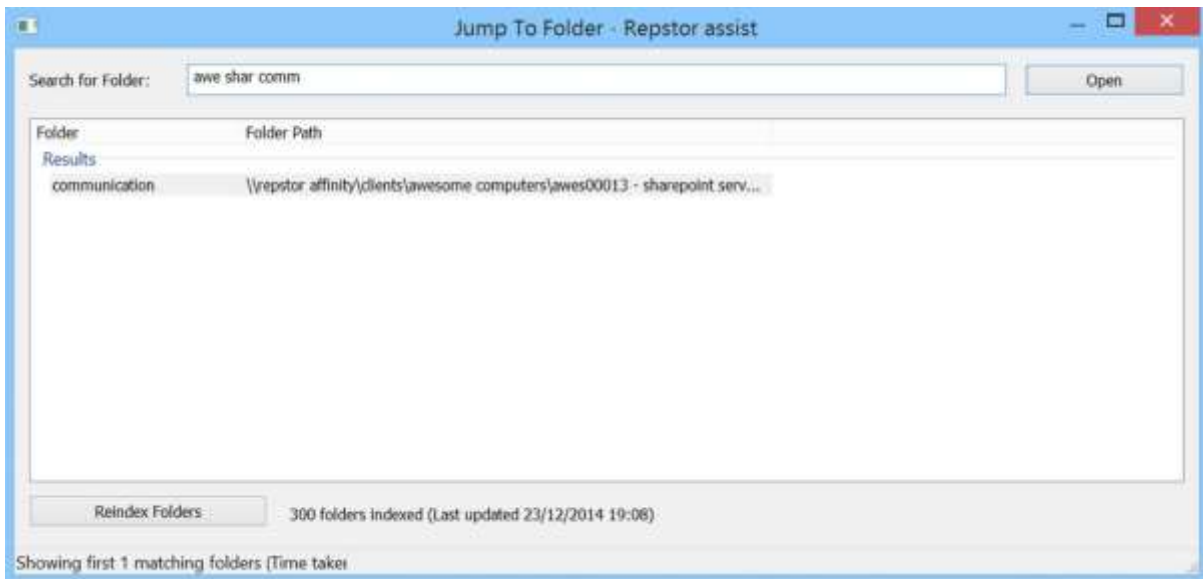

*Figure 18 - Filtered to single folder*

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

Figure 19 - Quick File in Repstor assist ribbon

The Quick File function within Repstor assist 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. Items can then be copied or moved to the selected location. When filing from the Microsoft Office applications a Select button replaces the copy/move button.
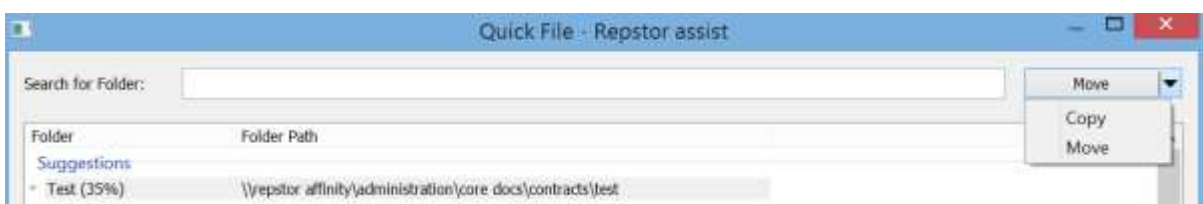
Quickfile Attachments will do the same for all of the attachments on all of the selected emails (in this case a copy rather than a move is performed, the original emails are left unchanged).

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 (add from the desktop)

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.
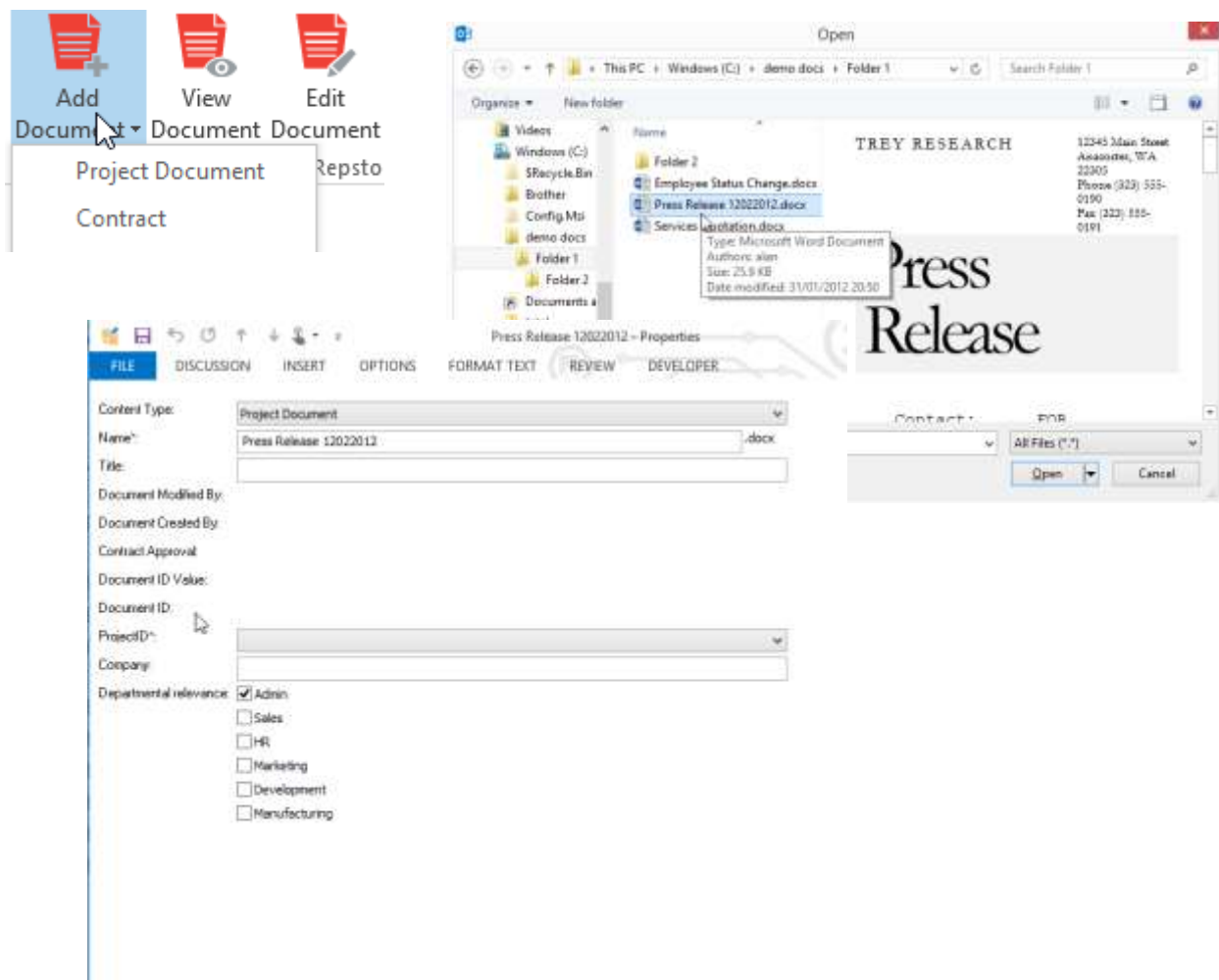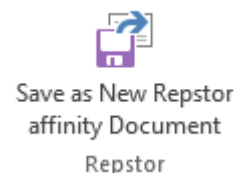

Figure 20- Adding a single file

Adding content from Word, Excel, Powerpoint

From within the application click on the Save as Nrw Repstor affinity document button, which will open the Quickfile dialogue and the item can be added to the required folder.

Generating a new document from a custodian template

You can generate a new document from a template using the "New "Document"" button in the Repstor affinity ribbon and selecting the required template and providing a name when prompted.
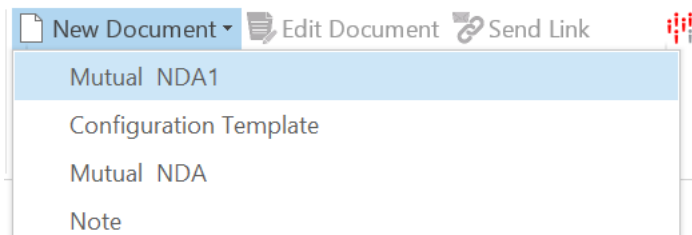
From Outlook (Email or other affinity content)

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), swelecting Repstoraffinity->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.
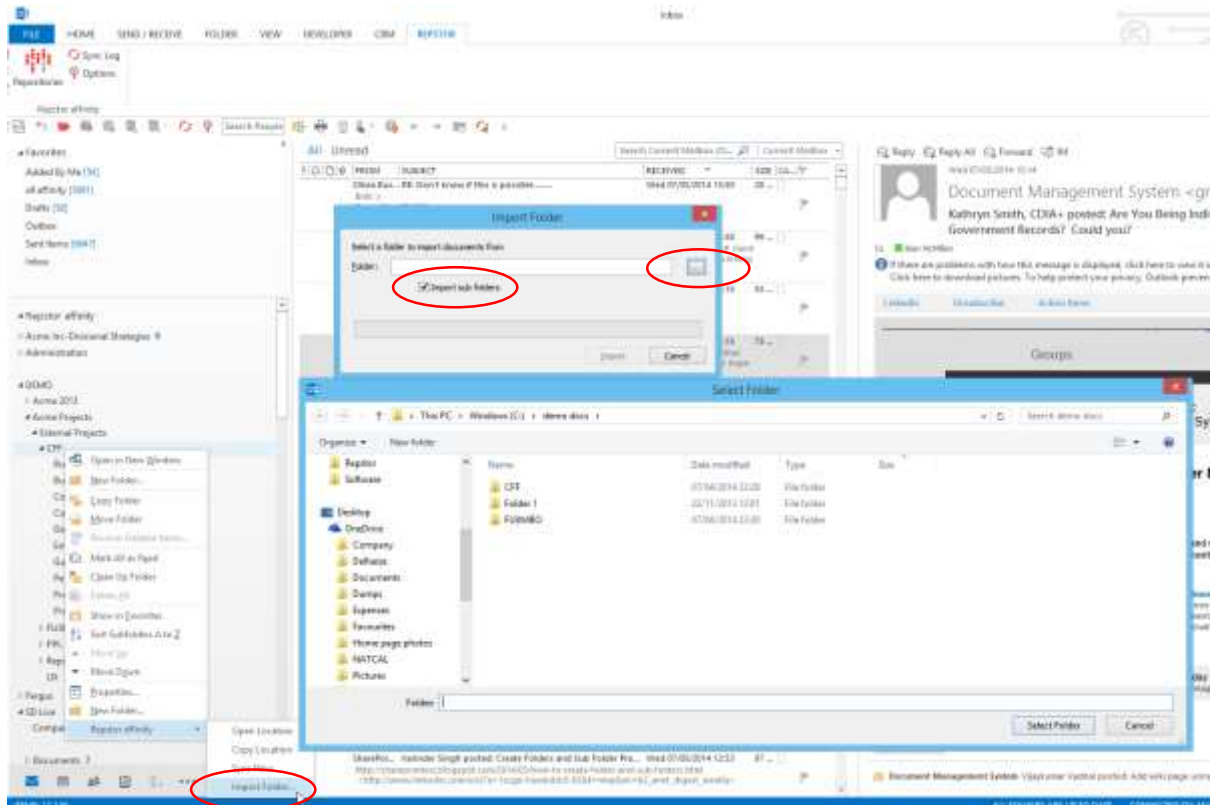

Figure 21- Importing Folders from the desktop/fileshares

More information, hints and tips and how to's can be found in the Repstor affinity and Repstor assist user and configuration guides.