fileTrooper v2

User Manual

Table of Contents

fileTrooper User Manual © ROOTFUSION

Document revisions

This document refers to the software called fileTrooper, all releases included. The document revision history is detailed in the table hereafter.

March 2014	FLTP .NET	- First Edition of User Manual
October 2018	FLTP V1.1.0	- SharePoint add-in
February 2019	FLTP V2.0.0	- SlickGrid integration
March 2019	FLTP V2.0.0	- FREE edition added
April 2019	FLTP V2.1.0	- Routing feature added
October 2019	FLTP V2.2.0 FLTP V2.2.1	- Document libraries pick-up, administration and licenses management - File preview adjustments, routing layout enhancement
November 2019	FLTP V2.3.0 FLTP V2.3.1 FLTP V2.3.2	- Support for large libraries with virtual scrolling - Support virtual scrolling in grouped views - Added counters in grouped views
June 2020	FLTP V2.3.3 FLTP V2.4.0 FLTP V2.5.0 FLTP V2.6.0 FLTP V2.7.0 FLTP V2.8.0 FLTP v2.9.0	- Support for shortcuts - New user interface, support large files upload - New routing design, theme selector, text file editor, license voucher - Groups of libraries in the tree view - New library picker and Teams libraries support - Add and manage libraries from tree view, content type support, auto detected group sites - Add support of lookup and person or group fields
September 2020	FLTP v2.9.2	- Add drag and drop support between the grid and the tree - Improved hyperlink - Added support for "Auto checkout" - Added auto addition of Teams library/Group - Provide direct access to the sharing manager, library permissions, library settings
May 2021	FLTP v2.10.3	- Optimization and bug fixes - New licensing model

Introduction

Purpose of the document

This document contains the user manual of the software fileTrooper. It has been created at our best effort however it may contain errors for which we do not endorse any responsibility.

This document describes the procedure to install the application on your SharePoint sites, the different features of the application and the way to use it.

Purpose of the application

The purpose of fileTrooper is to provide to the end user an easy way to manage, browse, and search files stored in the different libraries of SharePoint sites.

fileTrooper is a SharePoint add-in to extend the SharePoint experience in files management and exploration. The current version is delivered via the platform Microsoft® AppSource (including the SharePoint Store) and can be installed and executed on SharePoint platforms such SharePoint Online.

fileTrooper can be used on existing environments without the need of setting up additional server-side components.

Installation

Important note: you should not install fileTrooper on the root site of your SharePoint environment, because fileTrooper inherits permissions from the installation site and that it requires the users to have view, add, update and delete list items permissions to save their settings (e.g. the site Members group). This is unlikely that standard users have these permissions on your root site.

You should deploy fileTrooper in a subsite for which you can break permission inheritance and define permissions using the default site groups: site owners are identified as fileTrooper administrators, and site members as users. Once installed, fileTrooper can then access any site of your SharePoint environment (not only sub-sites), based the users permissions defined in SharePoint. Therefore, you need only to install fileTrooper in one place for your entire organization.

You can either install fileTrooper from the Microsoft SharePoint store, or from our web site as an app package. We try to submit the latest version to Microsoft SharePoint store as soon as it is available. However, the version available on the store will always be published later than on our web site due to the delay generated by the Microsoft application verification process (prior to be available on the store).

Download fileTrooper app from the SharePoint store
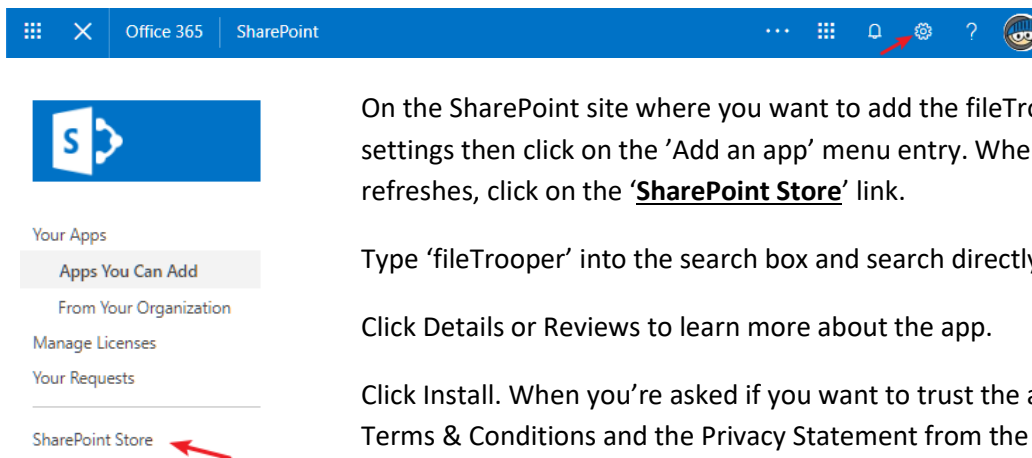
On the SharePoint site where you want to add the fileTrooper app, open the settings then click on the 'Add an app' menu entry. When the page refreshes, click on the '**SharePoint Store**' link.

Type 'fileTrooper' into the search box and search directly for the application.

Click Details or Reviews to learn more about the app.

Click Install. When you're asked if you want to trust the app, review the Terms & Conditions and the Privacy Statement from the app, and then click 'Trust It'. The app will now appear on the Site Contents page. You can start it by clicking its icon on the Site Contents Page, which will take you to the fileTrooper app.
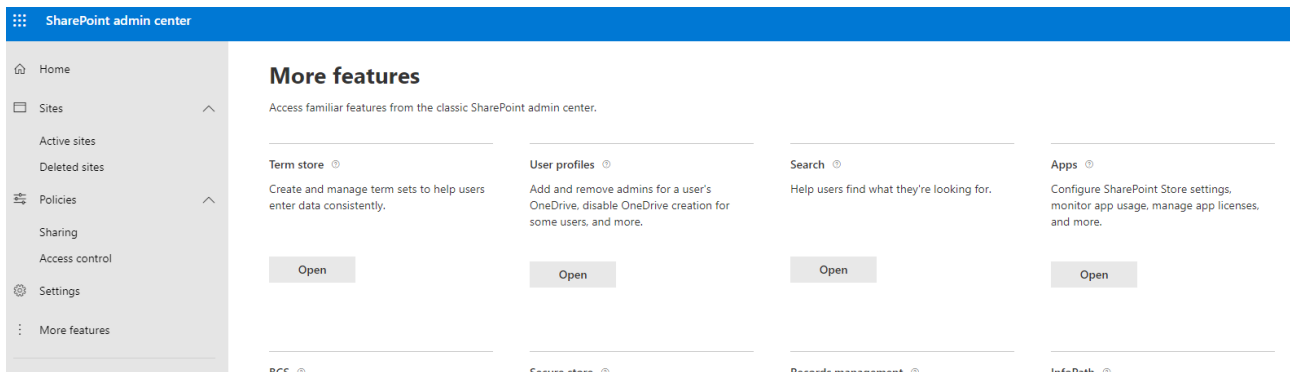
Remarks:

• You must have Full Control permissions to add apps from the SharePoint Store. You already have this if you are the Site Owner.

• If your administrator has not configured your site to allow users to get apps, you may still be able to request an app. The person in your organization who manages the App Catalog site can approve or deny requests for purchasing apps.

In order to download the application on your SharePoint tenant, you need first to setup a SharePoint application catalog site. This must be done only one time, and later on your will simply upload new fileTrooper versions in this site.

Setting up a SharePoint Application Catalog site

Open the "SharePoint admin center" and click more features. Apps will be listed:

Open Apps:

Create a new app catalog site:

fileTrooper User Manual © ROOTFUSION

Define your catalog location, title and other parameters:

Apps

Create App Catalog Site Collection
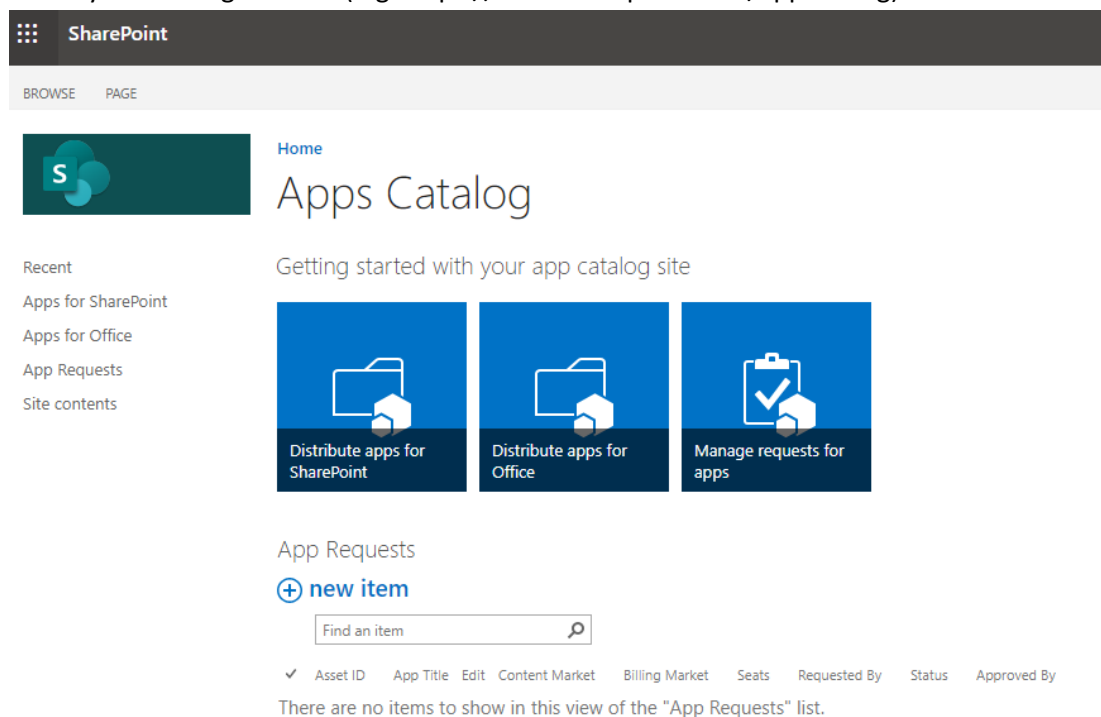
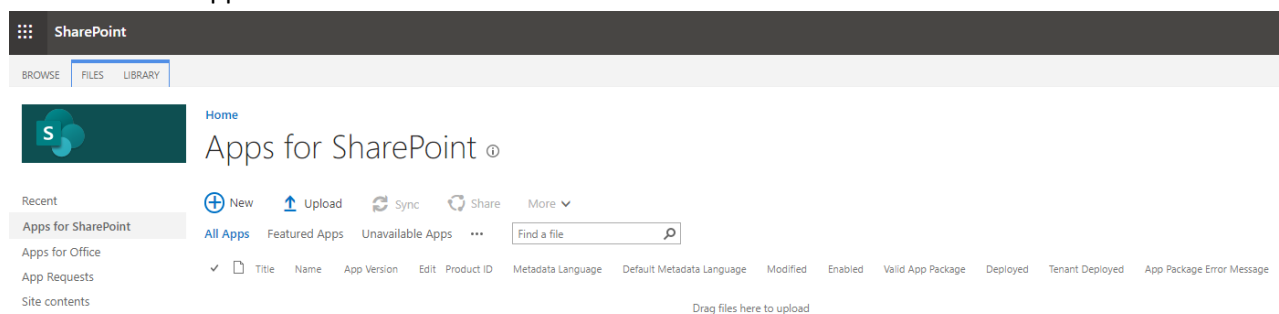|	
Title	Apps Catalog
Web Site Address	https:/‗‗‗‗sharepoint.com ▾
	/sites/ ▾ appcatalog
Language Selection	Select a language: English ▾
Time Zone	(UTC-08:00) Pacific Time (US and Canada) ▾
Administrator	
Server Resource Quota	300 resources of 11000 resources available

OK   Cancel

Deploying fileTrooper package in your SharePoint Application Catalog site

Go on your catalog site URL (e.g. https://xxxx .sharepoint.com/appcatalog)

SharePoint

BROWSE   PAGE

Home
Apps Catalog

Recent
Apps for SharePoint
Apps for Office
App Requests
Site contents

Getting started with your app catalog site

Distribute apps for SharePoint   Distribute apps for Office   Manage requests for apps

App Requests

⊕ new item

Find an item 🔍

✓ Asset ID   App Title   Edit   Content Market   Billing Market   Seats   Requested By   Status   Approved By

There are no items to show in this view of the "App Requests" list.

Click Distribute apps for SharePoint

SharePoint

BROWSE   FILES   LIBRARY

Home
Apps for SharePoint ⓘ

Recent
Apps for SharePoint
Apps for Office
App Requests
Site contents

⊕ New   ↑ Upload   ⟳ Sync   Share   More ∨

All Apps   Featured Apps   Unavailable Apps   •••   Find a file 🔍

✓ 📄 Title   Name   App Version   Edit   Product ID   Metadata Language   Default Metadata Language   Modified   Enabled   Valid App Package   Deployed   Tenant Deployed   App Package Error Message

Drag files here to upload

Click New, and select to upload the fileTrooper package file (to be downloaded from our web site):
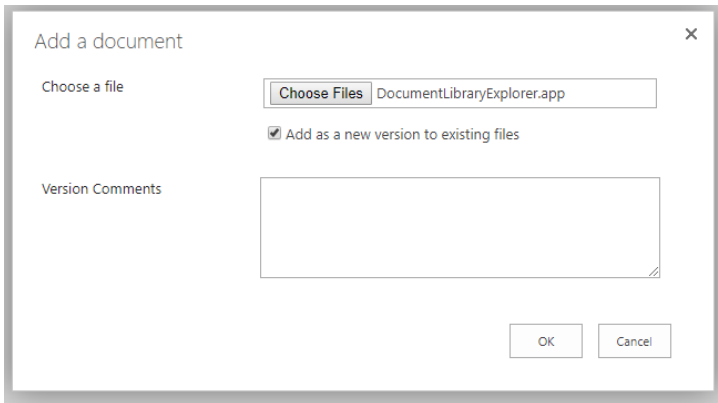
Once uploaded the package will be listed:
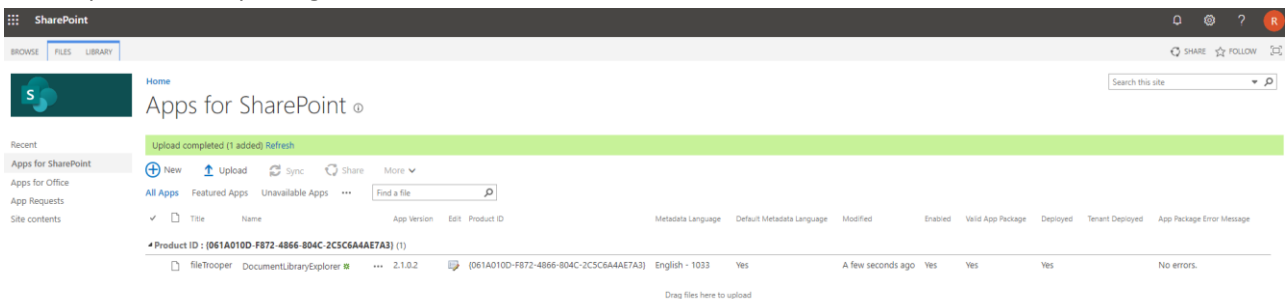
When you want to update the package version in your internal catalog, just "drag and drop" the new application package file over the existing one (and confirm you want to replace it).

You can now proceed with the installation of fileTrooper on the SharePoint site of your choice, by selecting "From Your Organization":

On the SharePoint site where you want to add the fileTrooper app, open the settings then click on the 'Add an app' menu entry. When the page refreshes, click on the '**From your Organization**' link.

Your will find the fileTrooper app listed. Click Install. When you're asked if you want to trust the app, review the Terms & Conditions and the Privacy Statement from the app, and then click 'Trust It'. The app will now appear on the Site Contents page. You can start it by clicking its icon on the Site Contents Page, which will take you to the fileTrooper app.

Updating fileTrooper app

When a newer version is deployed in your catalog or in the store, you can update your fileTrooper instance via the site content where it has been installed (go to the application details).
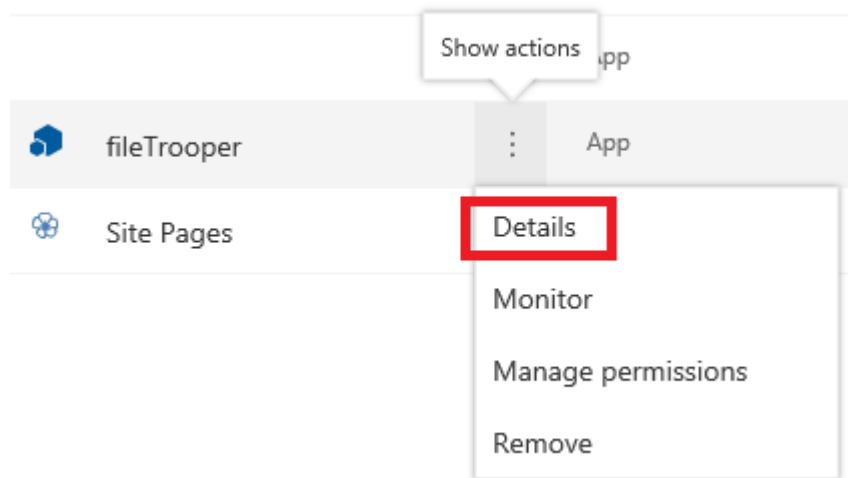
Important note:

fileTrooper checks automatically **our servers** and notifies the users when a newer version exists.

🛑 [You are not running the latest version available (2.3.2.0)]

When you are updating your fileTrooper app, if you deployed your fileTrooper instance from the Microsoft store, SharePoint will look in the store for the latest version. And if you deployed your fileTrooper instance from your internal application catalog, SharePoint will look in your catalog for the latest version.

If you would like to change the way that SharePoint looks for the latest version (in the store or in the catalog), you first need to remove your fileTrooper instance and then deploy it again from the source that you prefer. Your settings are in the backup list and should be recovered automatically. However, all routing data will be lost (this is currently not backed up).

Manage fileTrooper licenses assignment with users

Once installed, fileTrooper comes up with a certain amount of user licenses FREE of charge. The licenses are **automatically assigned** to the users when launching the application.

To remove an assigned license, run fileTrooper as administrator (site owner from the site where the application has been installed) and open the 'License manager' from the menu (click the top right user icon).

You can either remove or request additional licenses from the 'License manager':
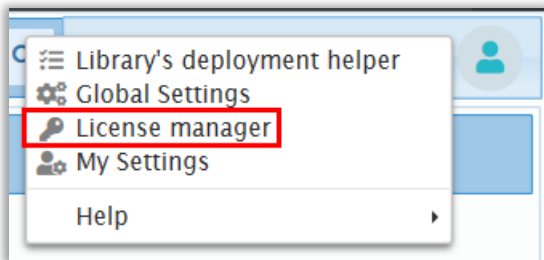
Select your license pack entry (e.g. you click the row with your initial pack of free licenses), and then your click the button 'Manage license users'

The system will list assigned license slots. To remove the assignment of a license for a user, click the icon in the Action column of the user:

After removal of one or more license assignment(s), click SAVE to confirm your changes.
==Important note==: when you remove an assigned license, you remove also the settings of the assigned user.

To request additional licenses, use the button '**Request new licenses**'.

Overview and configuration

How to start the application?

After having installed the fileTrooper app on your site, go to site content and you can start the fileTrooper app by clicking on its icon or the associated link. This will load the fileTrooper app in your web browser.

SharePoint provide also, a quick URL to access your app. The app URL will be the one of the sites on which you installed fileTrooper followed by /fileTrooper.

Example: https://contoso.sharepoint.com/sites/projects/**fileTrooper**

First start of the application

In case of first start of the app, the application will load by default all the available libraries contained in the site where fileTrooper has been installed.

You can then override the default libraries by customizing your preference via the tree view.

You can also define your personal settings via the application menu 'My Settings'.

See the chapter about the configuration to have more information regarding the adding of new libraries.

Overview

Main screen

The main screen of fileTrooper is as follows (when user's view layout is 'Vertical 3'):
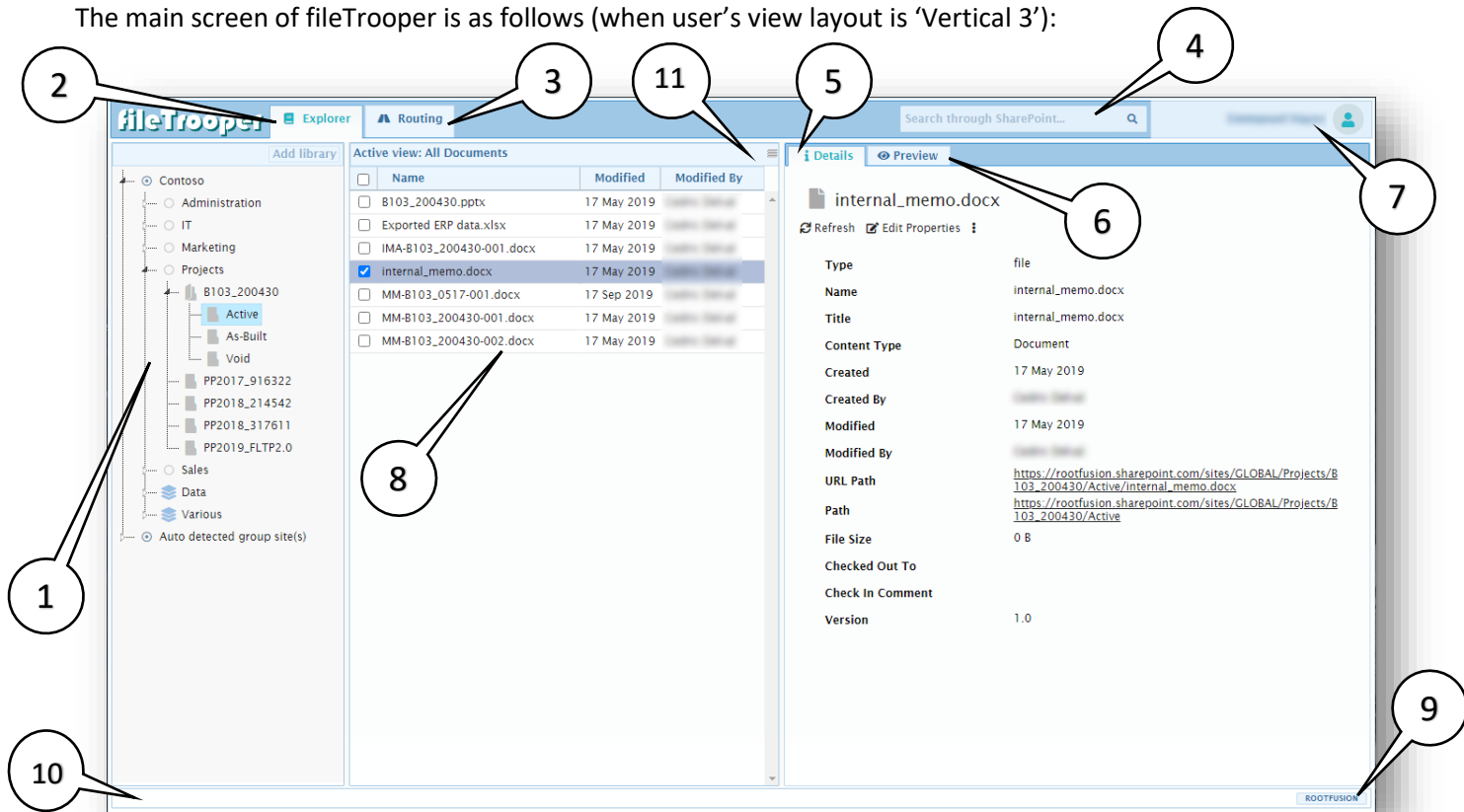
1. **Tree view area** — The groups, document libraries and folders are displayed here. User can select a document library or a folder to have access to their detailed information's and to load files of the selected library or folder. By right clicking in this area a context menu will appear to allow libraries organizations and actions on folders and document libraries.

2. **Repository** — The name of the repository.

3. **Routing** — The routing tab.

4. **Search box** — The search box will allow user to search for files through document libraries and folders. Note that the search relies on your SharePoint configuration.

5. **Details tab** — When the details tab is active, the user will see detailed information about the document library, the folder or the file selected.

6. **Preview tab** — When the preview tab is active, the user will be able to preview the file (if the preview for this type of file is supported by the web browser and if the preview is authorized by the site owner).

7.	**User and menu**	Shows the connected user. By clicking on the username, the application menu will popup.
8.	**Files explorer**	The files contained into the selected document library or folder are displayed here. User can select a file to have access to the file details or preview. By right clicking in this area a context menu will appear to allow actions on files or on the content of the selected folder or document library.
9.	**ROOTFUSION**	A direct hyperlink to our website.
10.	**Status bar**	Area reserved for displaying status information like: license state, expiration reminder, operation progression.
11.	**View settings**	Shows the actual. By clicking on the symbol ≡, you can select another view or adjust the displayed fields.

Application menu

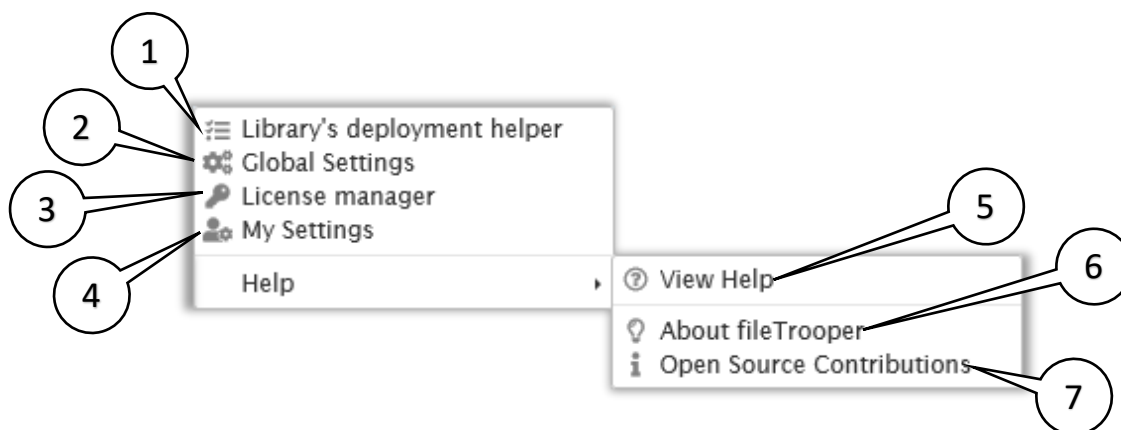By clicking on the username, displayed on the top right corner of the app, a menu will popup. The fileTrooper main menu is as follow:

1.	**Library's deployment helper**	This option is only visible for the site owner and allows to define libraries settings for the other users based on a selection or a user template.
2.	**Global settings**	This option is only visible for the site owner and allows to define the global and default settings of the application for the other users.
3.	**License manager**	This option is only visible for the site owner and allows to control licenses and associated users.
4.	**My settings**	This option is available for all end-users to define their personal settings for the application.
5.	**View help**	Give access to this user manual.
6.	**About**	Show the about screen of the application with the actual running version.
7.	**Open source contributions**	Show the list of open source contributions in fileTrooper.

Configuration

Depending if you are site owner or not, you can configure the application via the following screen:

Note: By default, fileTrooper uses the permission groups (site owner and site member) of the site where it is installed. It is possible, in order to customize the permissions and manage the access in fileTrooper or to certain functionalities, to create 2 specials groups named "**DLE_Maintenance**" and "**DLE_User**" (case is important) which will replace respectively the owner and users predefined groups.

- Global Settings: only accessible for the site owner to define the global and default settings of the application for the end-users.

- My Settings: accessible for the end-users to define their personal settings for the application.

1. **Theme** This option allows the site owner to select the general theme of fileTrooper.

2. **[Default] View layout'** This option allows the site owner to select the default view to be applied for the end-users. In case of a user this option allows him to select the application view layout and override the global setting.

    The following layout are available:
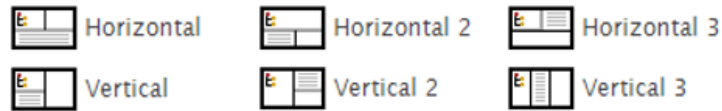
3. **Virtual paging size (only on global settings)** This option allows the site owner to define how many items are loaded when displaying a folder content.
    Note: Scrolling down to the bottom of the list will trigger the display of additional files.

4. **Repository Name (only on global settings)** This option allows the site owner to define the display name of the repository.

5. **SharePoint Tenant name (only on global settings)** This option allows the site owner to define the tenant name where fileTrooper is installed.

    This allows to display the user picture in the different user list across the application.

6. **Authorized extension for preview (only on global settings)** The site owner can decide which file types are allowed or not for the preview in fileTrooper.

    The following list of extensions is available for configuration: 'doc, docx' / 'xls' / 'xlsx' / 'ppt, pptx' / 'vsd, vsx' / 'jpg, jpe, jpeg' / 'png' / 'tif, tiff' / 'gif' / 'bmp' / 'ico' / 'svg'

    To remove an extension, you should click on the "Cross" icon associated to the tag entry:
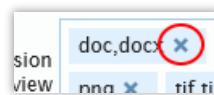
7. **Authorized extension for text only preview (only on global settings)** The site owner can decide which text file types are allowed or not for the preview in fileTrooper.

    The following list of extensions is available for configuration: 'txt' / 'csv' / 'json' / 'xml' / 'sql' / 'ini, cfg, conf, config' / 'html, html' / 'css' / 'bat, ps, sh' / 'log' / 'me' / 'url' / 'ps1'

    To remove an extension, you should click on the "Cross" icon associated to the tag entry:
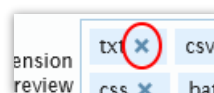
8. **Font family for text only preview** This site owner can decide the font used in the text file preview.

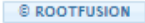|	**(only on global settings)**
9. **Branding**	Branding {"Logo":{"Image":{"background-image":"url(\"../Content/Images/fltp_main_noArchie.p Be careful to only change the branding setting knowingly. **fileTrooper** You may change the application top left logo and put your own company logo © ROOTFUSION It's also possible to set the bottom right text and hyperlink. Note: the branding changes will only be effective when there is at least one NON-FREE license pack still valid in your license manager.
10. **Welcome to fileTrooper**	This hyperlink gives you access to the quick guide of fileTrooper.
11. **Manual**	This hyperlink give you access to the current document.
12. **Registered site**	This button allows to un-register the site linked to your installation. All users will be also automatically un-registered and their settings will be lost. There should only be only one location where fileTrooper is deployed for your organization. This button should be used when you want to deploy fileTrooper installation in another location: you first need to un-register the initial site prior being able to run fileTrooper from another installation site. After the un-registration of the site you will be redirect to the site home page.
13. **Ok**	The 'Ok' button allows to close the Settings screen and save the entered or modified data.
14. **Cancel**	The 'Cancel' button allows to close the Settings screen without saving any information entered or changed.
15. **Detect automatically new Group sites**	Checked by default. This option allows fileTrooper to automatically check at each load if there is new SharePoint site created with Office 365 Groups (from office application like Teams, planner, one note, outlook, etc) and add their default Documents Library to the user setting. These libraries will be showed in a specific root node in the tree view called "Auto detected group site(s)" inside of a fileTrooper group representing the parent SharePoint site. ⊙ Auto detected group site(s) Address book (Addressbook) **DLE (DLE)** **Hotel Contoso (HotelContoso)** Outlook Customer Manager (AllSalesTeam-c0 **PrivateGroupSiteJF (PrivateGroupSiteJF)** **ROOTFUSION (ROOTFUSION)**
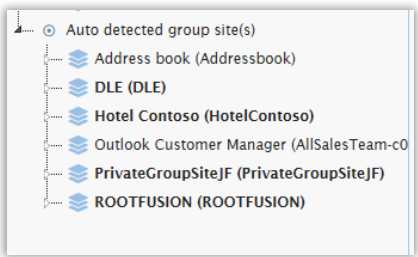
Library deployment helper

This function allows the fileTrooper administrator to deploy and manage user profiles in a few clicks. This is useful when the users have difficulties to identify which libraries to configure themselves in fileTrooper.

As administrator (site owner), click the user icon from the top right popup menu and select 'Library's deployment helper' entry:
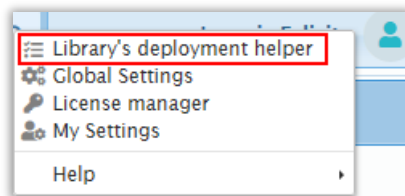
This administration tool allows you to:

- Either copy a user configuration to another user (the system will only add missing libraries to the target user's configuration)

- Or specifying which libraries must be added into the user's configuration (you can select libraries and specify if you want the default libraries to be included in your selection)

fileTrooper User Manual © ROOTFUSION

Use of fileTrooper

The tree view area allows the user to browse the document libraries and navigate through the different folders.
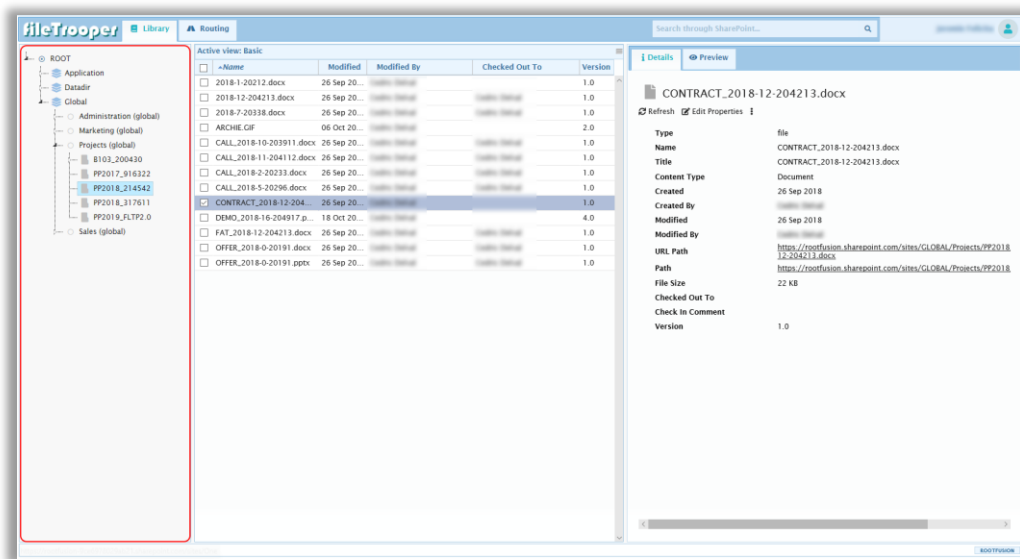
The tree view will display the Root node, groups that users has created and the document libraries of the user configuration.
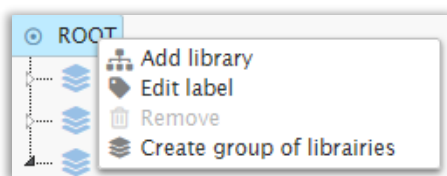
The user can right click on the root node ⊙ or a group 🗃 to display a context menu with several options.

Note: The user can right click in the tree view zone to display a global context menu.

List of options available for the root or a group

Add library	Open the library picker dialog to select and add one or more libraries in the selected group.
Edit label	Allow the user to rename and customize the root or group label.
Remove (only for group)	Allow the user to remove the selected group. Note: all subgroups or libraries contained in the deleted group will be removed from your settings (after confirmation).
Create group of libraries	Create a new group. The user will have to give the name of the group to create.
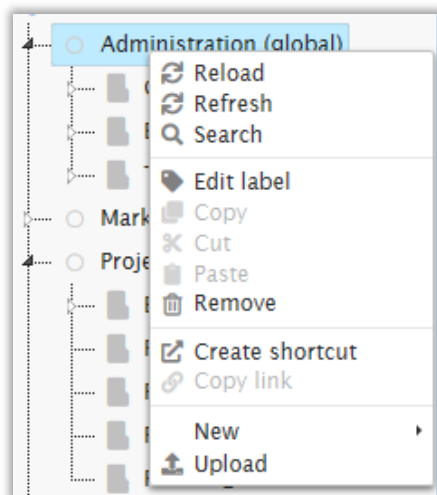
The user can right click on a document library to display a context menu with several options.

Note: To move folders, you can drag and drop folder nodes. Move is only allowed in the same document library.

List of options available for a document library

Reload	Allow to reload the library definition and root folder content.
Refresh	Refresh the selected document library content only.
Search	Open the search window to allow the user to perform a search on the selected document library.
Edit label	Allow the user to customize the selected library label. Note: the label is associated with fileTrooper and this does not rename the library in SharePoint.
Remove	Allow the user to remove the selected library from his settings. Note: the library is removed from fileTrooper and this does not delete the library in SharePoint.
Create shortcut	Allow the user to create a shortcut file pointing to this library.
New	
Folder	Create a new folder. The user will have to give the name of the new folder to create.
Text file	Create a new text file. The user will have to give the name of the new folder to create.
Word document	Create a new Word document file. The user will have to give the name of the new file to create.
Excel Worksheet	Create a new Excel worksheet file. The user will have to give the name of the new file to create.
PowerPoint Presentation	Create a new PowerPoint presentation file. The user will have to give the name of the new file to create.
Upload	Allow the user to upload file(s) directly in the root of the selected document library.

The user can expand a document library to view the folder(s) of the document library by clicking on the arrow preceding the document library's name or by double clicking the document library.
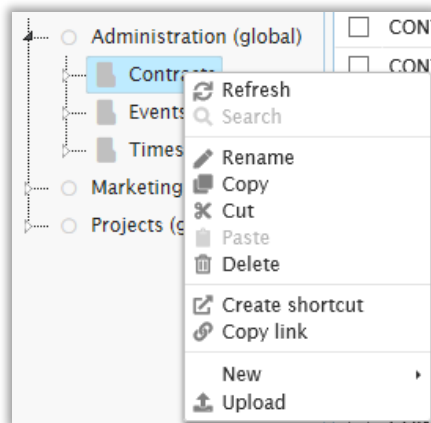
The user can right click on a folder to display a context menu with several options.

List of options available for a folder

Refresh	Refresh the selected folder.
Rename	Allow the user to rename the selected folder.
Copy	Copy the selected folder to allow the user to paste a copy of this folder to another location.
Cut	Cut the selected folder to allow the user to paste and move the selected folder to another location.
Paste	Paste the previously selected folder from a copy or a cut.
Delete	Allow the user to delete the selected folder.
Create shortcut	Allow the user to create a shortcut file pointing to this folder.
Copy link	Allow the user to copy into the clipboard the link to the selected folder.
New	
Folder	Create a new folder. The user will have to give the name of the new folder to create.
Text file	Create a new text file. The user will have to give the name of the new file to create.
Word document	Create a new Word document file. The user will have to give the name of the new file to create.

Excel Worksheet	Create a new Excel worksheet file. The user will have to give the name of the new file to create.
PowerPoint Presentation	Create a new PowerPoint presentation file. The user will have to give the name of the new file to create.
Upload	Allow the user to upload file(s) directly in the selected folder.

Adding a library

From the tree view context menu (root and groups) you can add one or more libraries by right-click and select the item 'Add library'.

In the library picker dialog, navigate through the tenant site structure and select your libraries by double-clicking on them. When finished, click 'Apply' and the selected libraries will be added to the user settings.
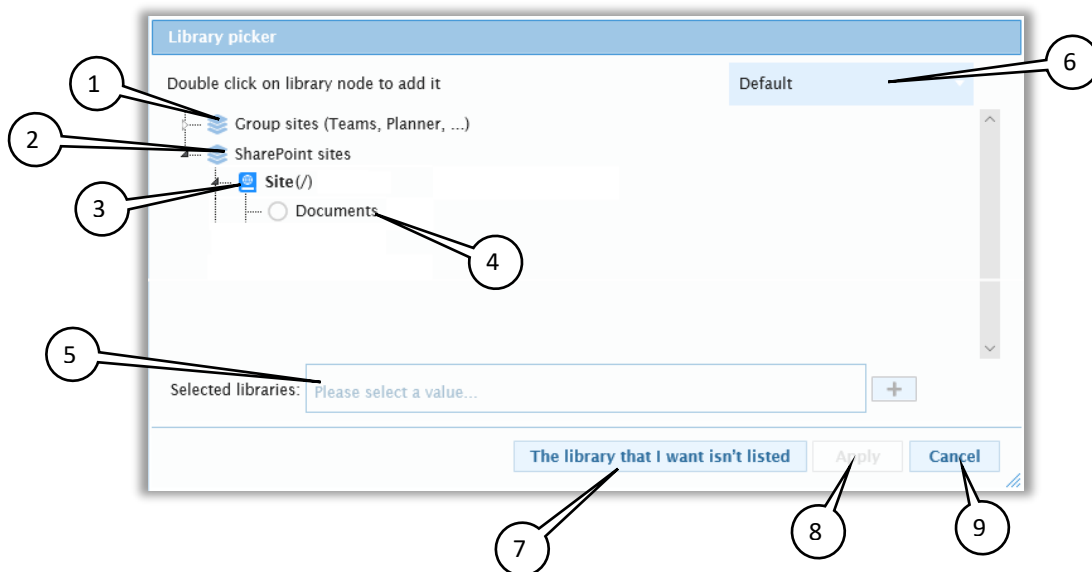
1.	**Group sites**	Global group containing all SharePoint private groups created from office365 app (Teams, Planner, …) for which the users have access.
2.	**SharePoint sites**	Global group containing current tenant SharePoint sites for which the users have access.
3.	**Site collection**	Represent a site collection in the current tenant. It can contains subsites or libraries.
4.	**Libraries**	Represent a SharePoint Document Library. User can double-click on it to add it to his settings.
5.	**Selected libraries**	Lists of all selected libraries in the library picker.

To unselect a library, the user must click on the "Cross" icon associated to the tag entry:
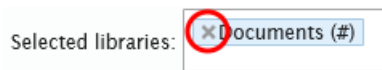
| 6. | **Library filter** | Dropdown filter to select library picker views. |

- Default: hide group sites where the users already have at least one library.
- Show All: Show all group sites and SharePoint libraries. Group sites with already selected entry are marked with a green icon and already selected libraries are greyed.

| 7. | **The library that I want isn't listed** | If the user don't find the library from the library picker, he can add it manually. To do so, click 'The library that I want isn't listed': |
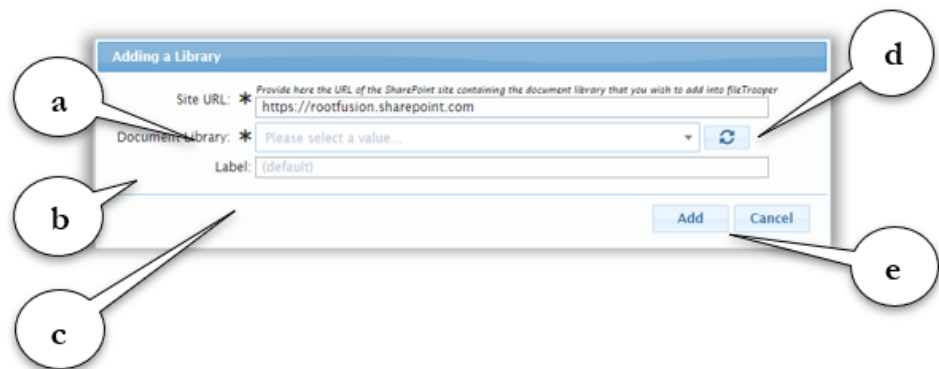
a.   The user must insert the site URL of the site collection holding the document library he wants to add.

ex: http://mysite.sharepoint.com/sites/nameofsite

Rem: All the libraries must reside on the same tenant and must be accessible by your account. You will be prompted for any accessibility issue.

Rem: When you copy/paste the URL from your site collection home page, be careful to remove the 'default.aspx' page reference.

b.   The user must select the title of the document library he wants to add.

ex: Administration

c.   The site user could define a label or let the default value, which will display the actual library title and site name.

d.   You can press this button to refresh the list of available document library.

e.   The site user can press the button 'Add' to confirm and add the document library or press the 'Cancel' button to go back to the settings.

Note that a library configuration may be added automatically to a user via the document routing feature. See the chapter about the document routing

8. Apply   Finalize the add of the selected libraries to the current user setting.

9. Cancel   Close the dialog without saving any changes.

fileTrooper User Manual © ROOTFUSION

If the selected document library or folder contains files, those files will be displayed in this area. The files are listed inside the grid with several columns depending on the selected view. Large amount of files in a folder (more than the value defined in the Global Settings for 'Virtual paging size') will be handled when the user scrolls down to the bottom of the list: the next set of files is loaded at this moment.

The user can select one or multiple files, the selected file(s) is marked as selected in the first column of the grid.
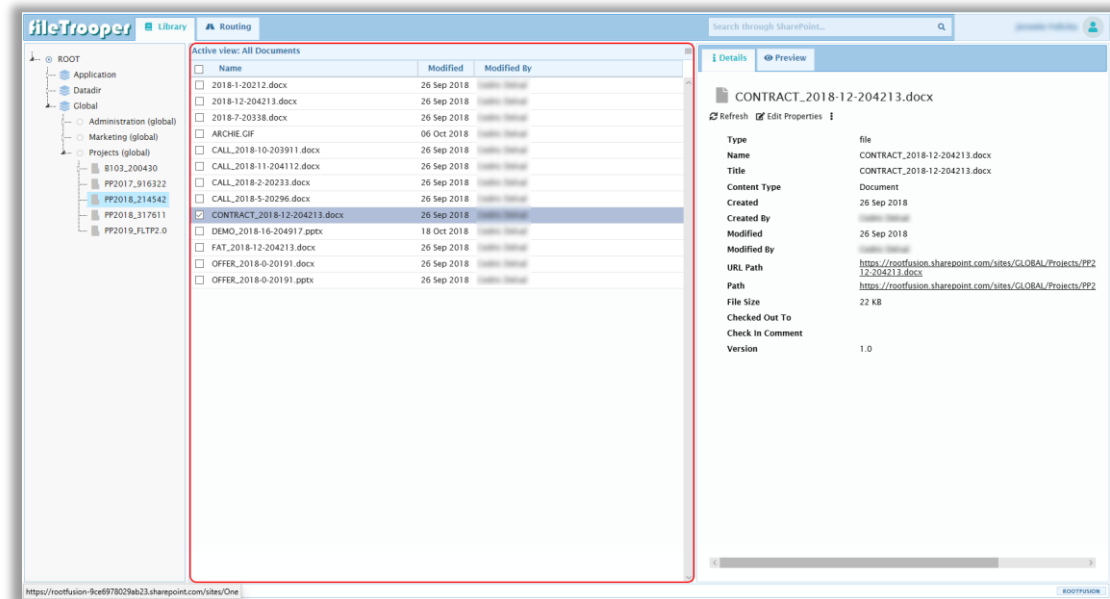
Views

fileTrooper retrieves all views definitions (public or personal) for each library and provides the columns selection, the predefined filters conditions and the grouping defined in SharePoint.

In this way you can improve and customize the display of each library in the file grid as you like.

 Shows the current view for the selected library.
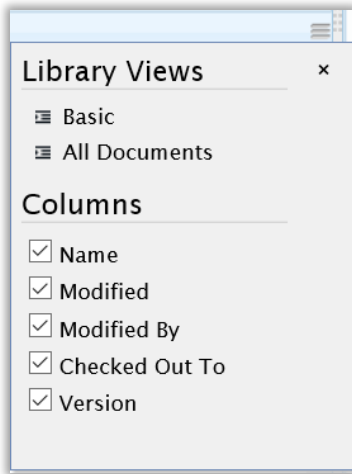
The grid menu lists all available views from SharePoint for the current library.

"Basic" is a fileTrooper built-in view and is available for all library.

You can also uncheck columns to hide undesirable one in the actual view.

List of columns of the grid

The first column of the grid is used to mark the file(s) as selected by the user. You can select all rows by clicking on the header checkbox.

The 'default view' is the one defined on the SharePoint library definition. When the "Basic" view is selected it will display the following columns:

Name	The name of the file.
Modified	The modification date of the file.
Modified by	Name of the person who has modified the file.
Checked out To	Name of the person who has checked out the file.
Version	The SharePoint version of the file.
Approval Status	Current status of the approval flow.
	This column is only displayed for library that require content approval workflow.

Other views columns are based on their definition and fields available in each library.
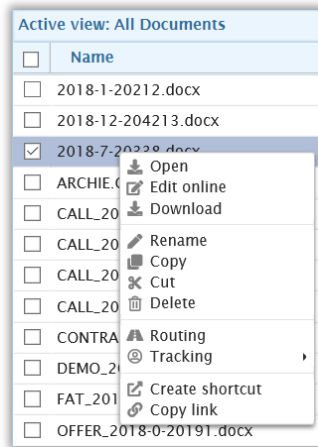
The user can right click on a file to display a context menu with several options. The available options will be applicable for all the selected files (files marked as selected in the first column)

List of options available for a file

Open	Open the selected file.
Edit online	This option allows the user to edit the document via the Microsoft Office Online.
Download	Download a copy of the selected file.
Rename	Allow the user to rename the selected file.
Copy	Copy the selected file(s) to allow the user to paste a copy of the file(s) to another location.
Cut	Cut the selected file(s) to allow the user to paste and move the selected file(s) to another location.
Paste	Paste the previously selected file(s) after a copy or a cut.
Delete	Allow the user to delete the selected file(s).
Routing	Allow to the user to access the routing feature for the selected file
Tracking	
Publish	When available, allow you to publish a new version of the selected file.
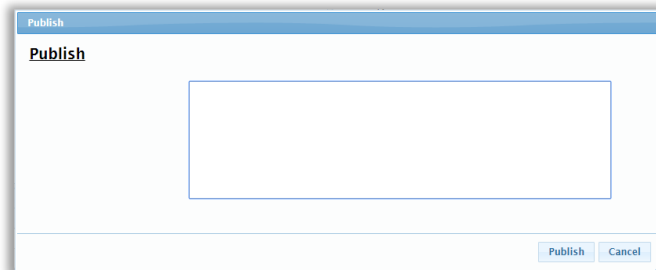
Check in	Check in the selected checked out file(s). Check in single file allow you to edit properties before continuing (see "Edit Properties" section for more information). For multiple files selection, only the

fileTrooper User Manual © ROOTFUSION

check in comment is available.
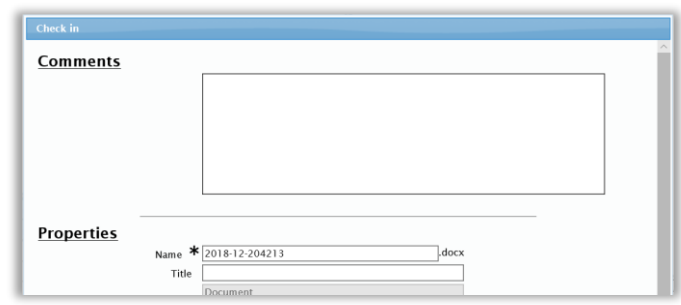
Check out   Check out the selected file.

Discard check out   Discard the check-out of the selected file.

Approve/Reject   Allow the user to change the approval status of the selected file.

                                This option is only available for library that require content approval workflow.

Version history   Open a popup screen with the version history of the selected file. (popup managed by SharePoint)

Create shortcut   Allow the user to create a shortcut file pointing to this file.

Copy link   Allow to the user to copy into the clipboard the link to the selected file.
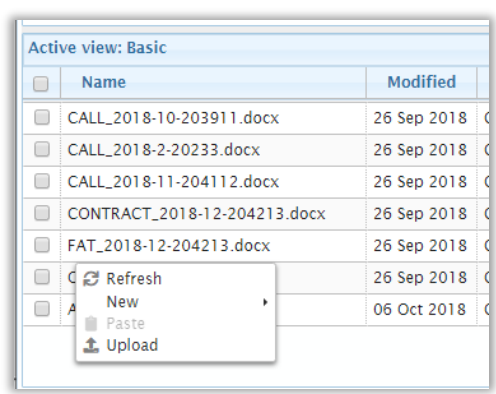
The user can right click in the file view area (on an empty row), or in the header (without clicking on a specific file) to display a context menu with several options.

fileTrooper User Manual © ROOTFUSION

List of options available in a file view

Refresh	Refresh the current folder.
New	
Text file	Create a new text file. The user will have to give the name of the new file to create.
Word document	Create a new Word document file. The user will have to give the name of the new file to create.
Excel Worksheet	Create a new Excel worksheet file. The user will have to give the name of the new file to create.
PowerPoint Presentation	Create a new PowerPoint presentation file. The user will have to give the name of the new file to create.
Paste	Paste the files located in the clipboard.
Upload	Allow the user to upload file(s) directly in the listed folder.

Important remarks:

- Moving files or folders is only allowed in the same library.
- Only the copy method is available between document libraries in the same or in different site collections.

The details area displays information about the selected document library, folder or files.
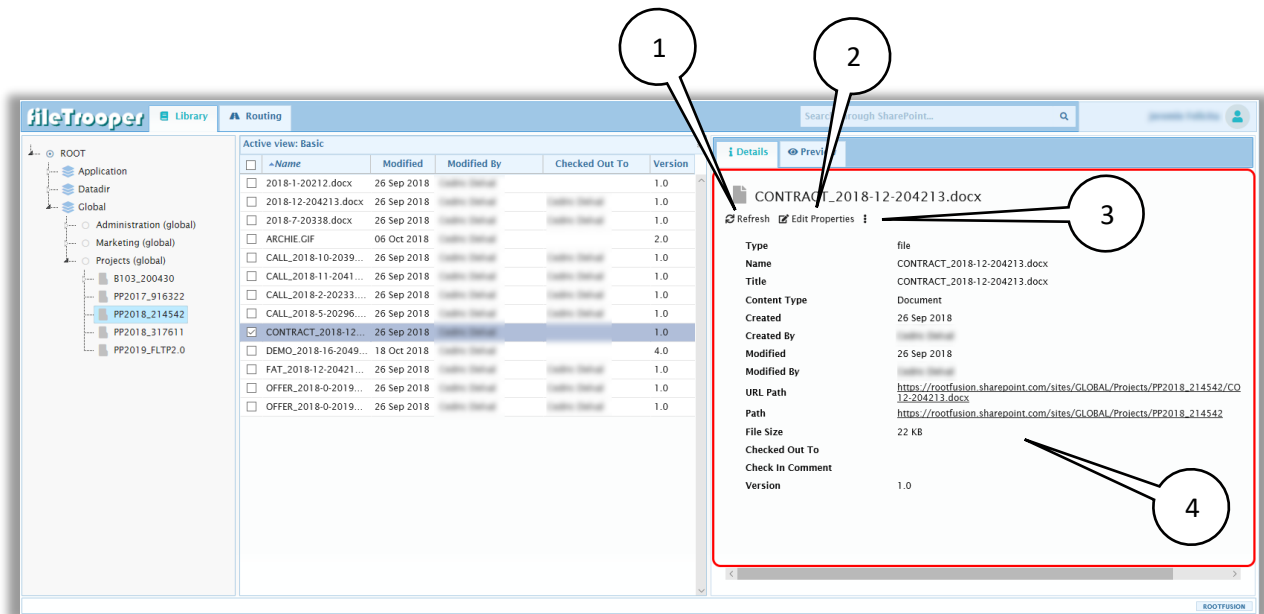
1. **Refresh**   This button allows you to refresh the selected file info to retrieve the latest data from SharePoint.

2. **Edit Properties**   It allows to edit the metadata configured by the site owner..

3. **Extended menu**
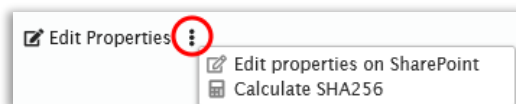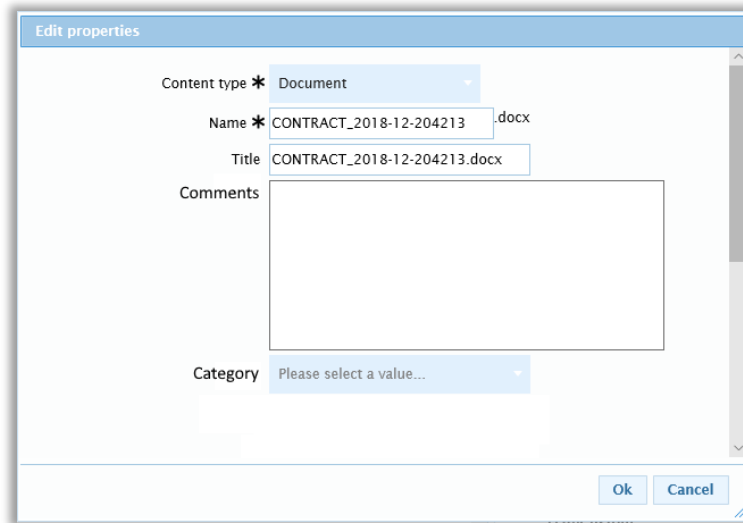
-   Edit properties on SharePoint: hyperlink giving you access to the selected item edit form (form managed by SharePoint).
-   Calculate SHA256: Tool to create an encrypted checksum of the file and other information to ensure integrity.

Rem: the edit properties page will be opened to a new popup window. You will be required to close the window to return to fileTrooper.

4. **Details**   Provide you some detailed information about the selected item like: filename, title (if available), file size, creator / editor and a direct link to the parent folder/document library.

fileTrooper User Manual © ROOTFUSION
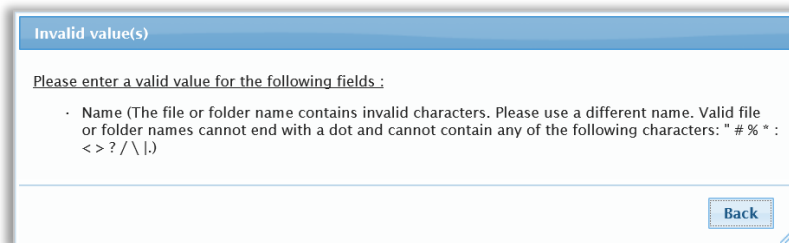
Edit properties

The "Edit properties" popup allows you to update the selected document's metadata.

The fields displayed depends of the document library definition and the content type of the document and show only the editable one.

If the library have the content type management enabled the 'Content type' dropdown will allow the user to change the document content type.

A validation is made before the update to ensure that mandatory values are filled and check if values match the different field type.

The following field type are supported for edition in the latest version:

- ➢ Single line of text
- ➢ Multiple lines of text
- ➢ Choice
- ➢ Number
- ➢ Currency
- ➢ Date
- ➢ Yes/No (check box)
- ➢ Hyperlink or Picture
- ➢ Task Outcome
- ➢ Lookup
- ➢ Person or group

Other types will not be displayed by default. These fields should be edited in SharePoint.

Preview

The preview area will present to the user a preview of the files if possible and if authorized by the site owner.
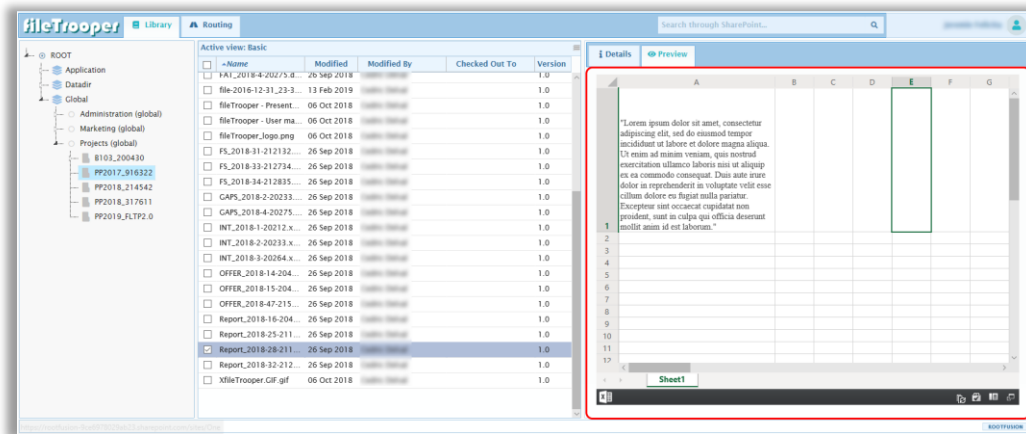
The following extensions are supported for the preview and can be configured by the site owner in the 'Global Settings' of the application.

List supported extension for preview of file:

doc,docx	xls xlsx	ppt,pptx	vsd,vsx
jpg,jpe,jpeg	png	tif,tiff	gif
bmp	ico	svg	

By default, all these extensions are active and authorized for the preview, site owner must remove the one he/she wants to block for the preview.

fileTrooper User Manual © ROOTFUSION

Document routing

The document routing feature is a simplified automated process to notify users and follow-up on actions to be performed on documents.

There are two types of routing:

➢ REQUEST (**REQ**): allowing the user to follow-up on requests sent to other users about a specific document.
➢ FOR INFORMATION ONLY (**FIO**): simply notify some users about the existence of a document, without expecting a mandatory answer from them

Example of **REQ** routing:

- You may ask some users (let's call them routing participants) to review a draft document that you prepared, and to mark the action as complete when they are done.
- Participants receive an email notification to review the document
- Participants follow the direct link (from the email notification) to launch fileTrooper and review the document.
- Participants mark their review 'as complete', or they specify they can't proceed with your request and they provide the reason for that.
- You receive a notification each time a participant marks the action 'as complete' (or when they specify it can't be done). You can follow-up who answered or not, and when, from within the application.
- You receive a notification when all participants answered your request.
- You close the request. It will disappear from your listing in 30 days.

Example of **FIO** routing: You created an excel file containing some figures that may be interesting for your colleagues. You launch an FIO routing for this document to your colleagues.

Start a routing

Right click a document and select 'Routing' from the popup menu.

fileTrooper User Manual © ROOTFUSION
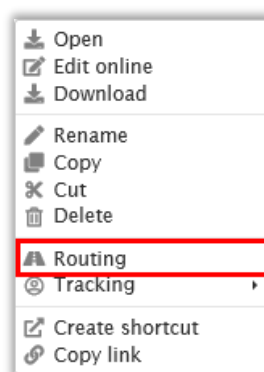
Provide values in the mandatory fields (marked by a *), and click the icon at the top right of the participants grid to assign your request to one or more users.

Automated library configuration in user settings

When a routing participant gets involved in a routing for a given document, the system will check if the document library holding the document is already configured for the participant (this is done when the participant access a document through a routing request). fileTrooper will prompt the participant to add the library if it's missing from user settings. This is an easy way to get your users connected to libraries.

Document routing TAB

The routing tab displays the routing requests that you received. Use the toggle button at the right side to display the routing that you have initiated yourself, or reverse:

If at least one request is awaiting the user input, fileTrooper opens the 'routing tab' automatically at the application start, and displays the requests awaiting answer in the first grid 'Received request(s)'.

Right click on the request to answer or to access the document:

Answer request
Q Locate document
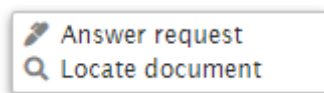
Any user can initiate and participate to document routing.

A routing initiator can see and manage the routing initiated in the second grid 'Initiated request(s)' as initiator.
Right click on a request to either remove a participant, or to manage a routing:

Routing ▸ | Q Locate document
Remove request | Edit routing
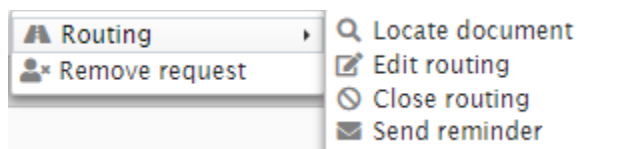| Close routing
| Send reminder

You can download the 'Initiated request(s)' under Excel format by using the download icon in the Routing TAB (next to the refresh icon, at the top right of the grid). Site owners can see all initiated requests, while standard users (Site members) will only see the requests that they have initiated themselves.

Edit a routing

This feature allows you to add participants through the edit routing feature.

Closing a routing
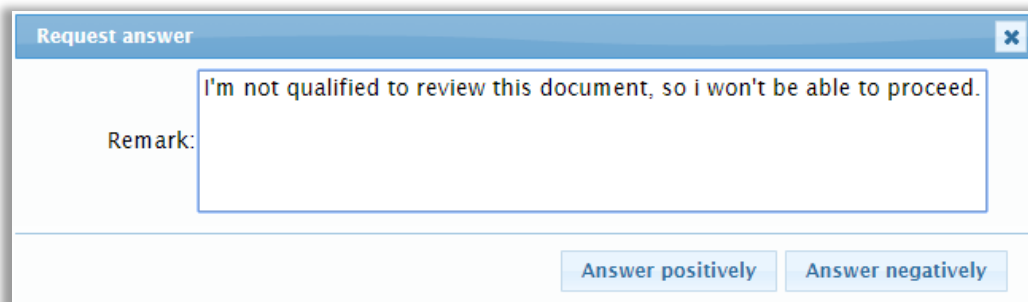
Closed routing will be removed automatically from the system 30 days after closure.

A REQ routing can be closed at any time by the initiator.
An FIO routing is closed by default, except if the user prevents this during the routing creation.

NOTE: fileTrooper administrators see and manage every routing (from any initiator). fileTrooper uses the group membership (from the site where the application has been deployed) to determine the user profile: site owners are considered as administrators, site members as standard users.

Answering a routing request

Request answer ✖

Remark: I'm not qualified to review this document, so i won't be able to proceed.

Answer positively   Answer negatively

The user provides a remark and clicks the appropriate button to answer either positively or negatively to the request.

Search

End-users can search for files via the search bar located at the top of the application to execute a search through all document libraries.
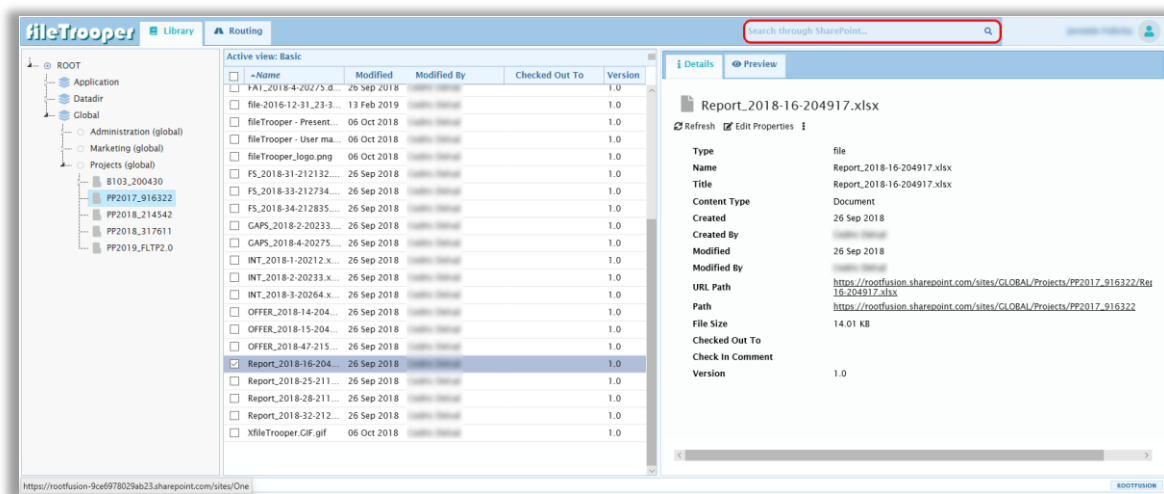
When the user presses the search button (or CTRL-F), a window with the search results will appear. The user can execute a new search directly from this search results window…
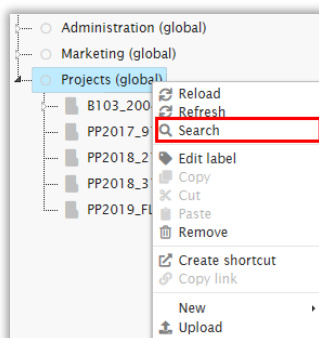
To limit the search to a specific document library, right click on a document library and select the search option from the context menu. Later the user can still adjust the search context inside of the search result window.

fileTrooper User Manual © ROOTFUSION

The search result window will contain the list of files resulting of the search based on the keyword(s) inside the selected search context.
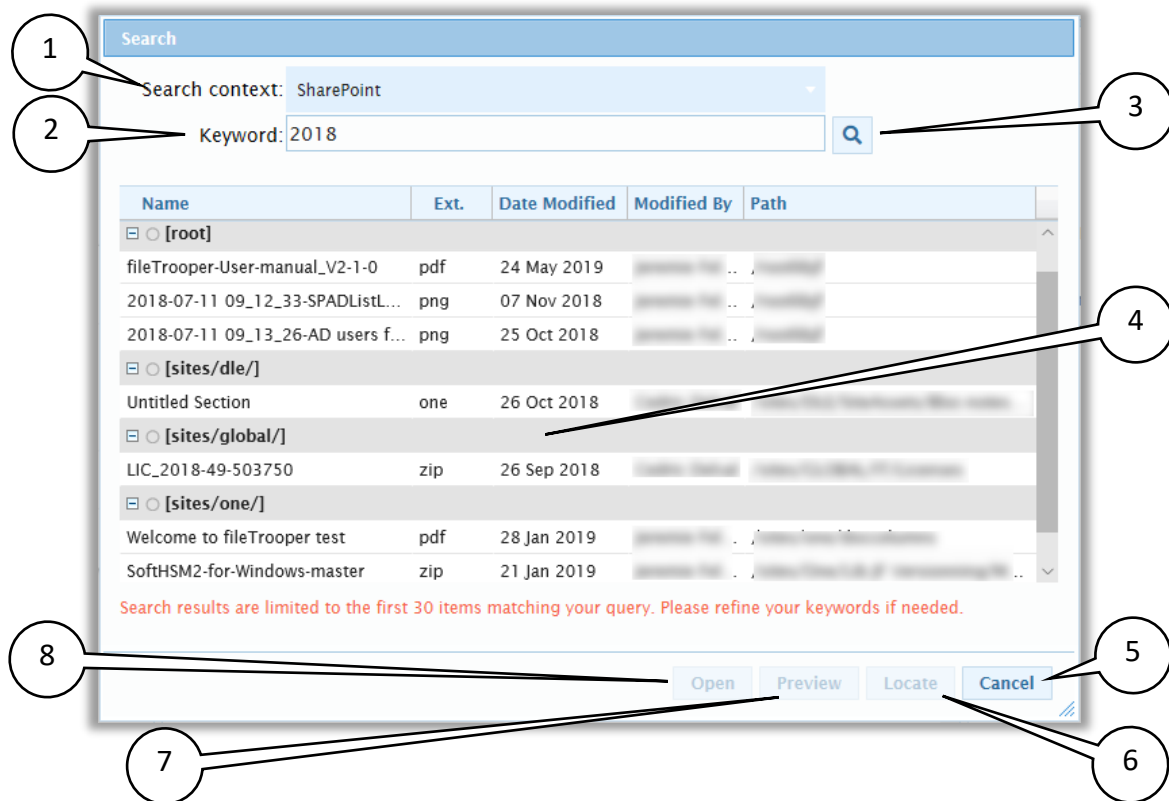
1. **Search context**   Define the context for the search by selecting a specific library for which the search must apply or by searching in all the SharePoint tenant.

2. **Keyword**   Keyword(s) to be used for the match.
  See 'Search mask' paragraph.

3. **Search button**   When the user pushes the button, the search is executed. Data already present in the result grid will be replaced by the new search result.

  Rem: This could be also accomplished by pressing [Enter] after editing the keyword.

4. **Search results**   List of the files returned by the search. (max 30).

  Rem: All the entries belonging to the same library are grouped together and hovering on any entry will pop up a thumbnail of the file content if available.

  Note: Libraries surrounded by brackets ([]) are not yet added to your fileTrooper setting. You will be prompted to add it to your setting in order to locate a file.

5. **'Cancel' button**   Close the search window result without selecting any files. Search result will be forgotten.

6.	**'Locate' button**	If a file is selected in the search result grid and if the user presses the 'Locate' button, fileTrooper will select automatically the file in the file view area and the tree view will be refreshed to target the correct location of the selected file.
7.	**'Preview' button**	If a file is selected in the search result grid and if the user presses the 'Preview' button, fileTrooper will open an 'interactive' preview into a new browser window.
8.	**'Open' button**	If a file is selected in the search result grid and if the user presses the 'Open' button, fileTrooper will download or open the file on your host. Rem: You could do the same operation with a double click on a file from the search result.

Search mask

The search is based on your SharePoint configuration, and uses the "Keyword Query Language" (KQL).

Keywords can be:

- Word: return result containing the full word

- Phrase: multiple words enclosed by quotation marks. Return result containing the words next to each other's.

- *: Wildcard. (Do not works as prefix)

- Space: Without quotation marks: works like an "AND" for each keyword.

For more information, see:

https://docs.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference

Frequently Asked Questions

How to get support for the fileTrooper app?

Only ROOTFUSION is authorized to sell or provide you with support over fileTrooper. ROOTFUSION does not provide 'official support' for the free version. Licensed users can use their 'customer ID' information received on their invoice to communicate via email with support at rootfusion dot com

Support request received without 'customer ID' won't be processed.

For any question when you don't have a 'customer ID', please send a one-time registration message to info dot fileTrooper at rootfusion dot com with the following information:

- Company name

- Country

- Company address

- First name

- Middle name

- Last name

- Title (Mr/Mrs)

- Position in company

- Phone number(s)

- Email address

- Product(s)

- Your question

Incomplete registration emails won't be processed.

I am not able to install fileTrooper on my SharePoint?

You must have Full Control permissions to add apps from the SharePoint Store. You already have this if you are a Site Owner. If your site owner has not configured your site to allow users to get apps from the SharePoint store, you may still be able to request an app. The person in your organization who manages the App Catalog site can approve or deny requests for purchasing apps.

You can always contact your Site Owner or your SharePoint Administrator to install fileTrooper for you or to give enough authorities to do it.

Error message: "You are not authorized to execute this application"
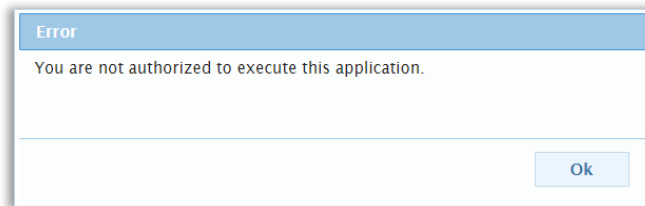
Verify that the current user is at least member of the permission group "Site Members" or "DLE_User" if this latter is created.

Note: "DLE_Maintenance" and "DLE_User" groups take the priority if they are created.

Error message: "There is no library definition available".
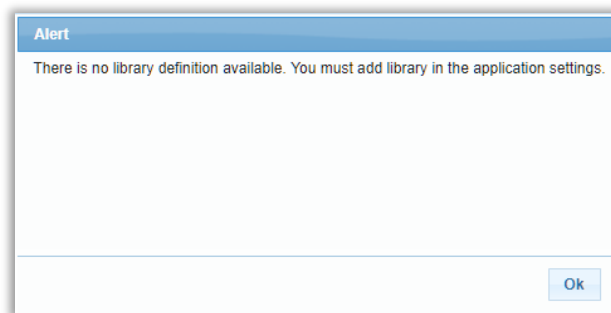
At minimum one document library must be configured in fileTrooper prior of any usage of the application, see the chapter about the configuration of the user manual to have more information regarding the adding of new document libraries.

Error message: "Connection was suspended".

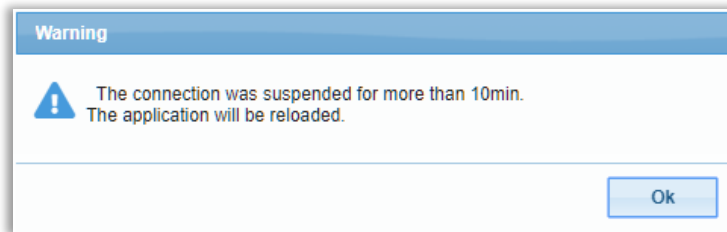If your fileTrooper session was disconnected for more than 10 minutes, your session will be expired, the application needs to be reloaded. You can reload the application by clicking the refresh button of your browser.

Can I install fileTrooper in one place to access all document libraries of my Microsoft tenant?

Yes. It's advised to install fileTrooper on one site only (because each instance of installation has its own settings), and because having only one URL to launch the application is easier to remember:

E.g.: if installed in site "https://contoso.sharepoint.com/userapps", the URL would be "https://contoso.sharepoint.com/userapps/fileTrooper"

Important note: you need to install fileTrooper in a site where users of the application have permissions to view, add, update and delete list items (e.g. the site Members group). This is because users must be able to save their settings. From there, fileTrooper can access other sites of your tenant, and permissions will depend on the SharePoint accesses granted to the user. fileTrooper checks the user membership (in the site on which fileTrooper has been deployed) to determine the profile within the application: site Owners are considered as 'fileTrooper administrators' (providing access to global settings), site Members are considered as 'fileTrooper standard users"

Will I lose my view settings every time I restart my browser?

No. The selected view for every defined library are stored inside your browser storage.

So, as long you use the same browser on the same computer, you will retrieve your view setting when you start the application fileTrooper.

Defined libraries are always kept in the system configuration, only the user views are linked to the browser. Views are defined in the SharePoint library settings.

Will I lose the settings if I completely uninstall then reinstall the application fileTrooper?

No if you do it on the same site (but routings will be lost). fileTrooper contains an automatic backup of the settings. So, every time someone changes the application settings, fileTrooper stores a copy of those changes in a list located on the site where fileTrooper was installed.

If you uninstall and then reinstall the application, and if fileTrooper detects the availability of this backup when it is started, it will restore the settings and users will automatically retrieve their libraries as previously configured.

Exception: the routings data (ongoing and past) will be lost when you uninstall the application

Why is there a list called "fileTrooper Setting Backup" on the site collection where the application fileTrooper is installed?

This list is automatically created during the start of the application and is used to store a copy of the changes applied to the settings.

You should NEVER remove this list, because you would lose the current backup of the settings for all the users.

Can external SharePoint users also use fileTrooper?

External users are those persons that don't have an email address within the same domain(s) as the one(s) of your organization. They are invited when someone grants them access to a file or set them member of a group. External sharing must be allowed at the site collection level.

External users can also use fileTrooper, and benefit from all the functionalities (including document routing). As for the internal users, they must be first set as member of the right groups (and therefore have access to your SharePoint and the fileTrooper application). The external users must also get a fileTrooper license assigned (see fileTrooper license assignment chapter)
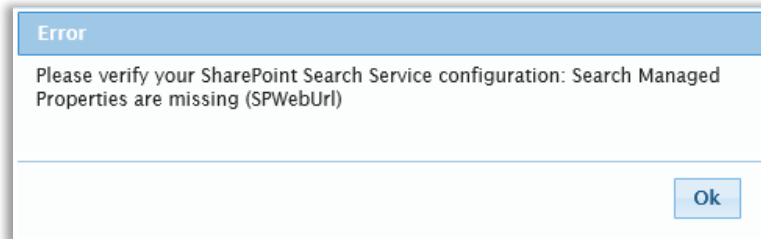
Error during the usage of the search functionality.

fileTrooper User Manual © ROOTFUSION
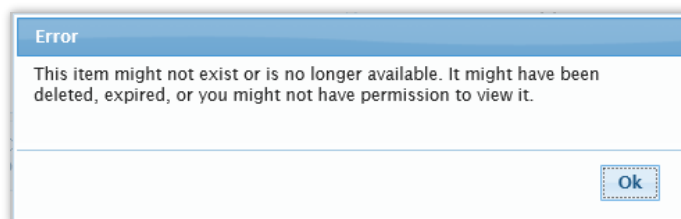
The index of all the items present in your SharePoint site is not updated in real-time, but around every 15 min. So, it's possible that a match provided by the search functionality does not exist anymore inside the target folder.
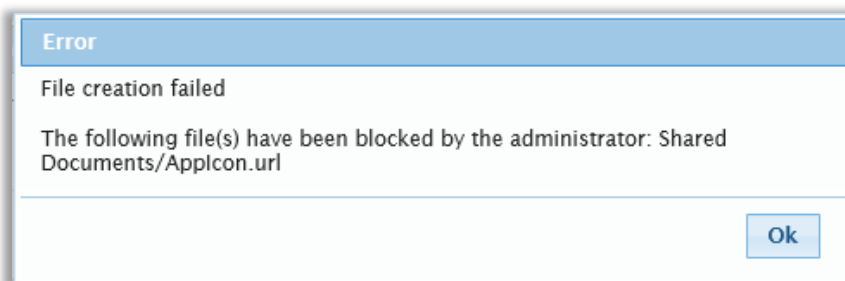
[SharePoint On-Premise] Error during the usage of the search functionality.

Be sure to have Search Service configured and crawling is active for your site collection.

> **Error**
>
> Please verify your SharePoint Search Service configuration: Search Managed Properties are missing (SPWebUrl)
>
> Ok

SPWebUrl managed property does not exists and must be created via the Central Administration Search Service Schema. You must create a managed property named "SPWebUrl" mapped on non crawled "ows_taxid_SPLocationSite" managed property.
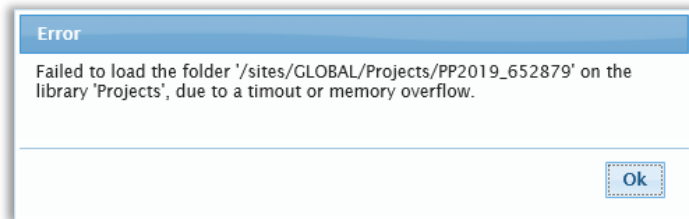
[SharePoint On-Premise] Error during the creation of a shortcut.

> **Error**
>
> File creation failed
>
> The following file(s) have been blocked by the administrator: Shared Documents/AppIcon.url
>
> Ok

File extension ".url" is blocked by administrator via Central Administration.

In order to allow the creation of shortcut, ".url" extension must be removed from unauthorized list items (via Central Administration => Security => Define blocked file types").

Error during the loading of a library.

Error

Failed to load the folder '/sites/GLOBAL/Projects/PP2019_652879' on the library 'Projects', due to a timeout or memory overflow.

Ok

Timeout message appears after a certain delay if the loading of a library encounters an error or take too many times.

## Error during the start of the add-in.

Error

There is another site already used to handle the registrations of your organization: [/sites/demo2].
Please note that fileTrooper FREE edition can only be registered on 1 site per organization.

Ok

Another installation has already registered and started using the fileTropper add-in. You must contact the other site owner if you need to test the application on your site.

Error

You have already reached the maximum of user's allowed on fileTrooper FREE edition

Ok
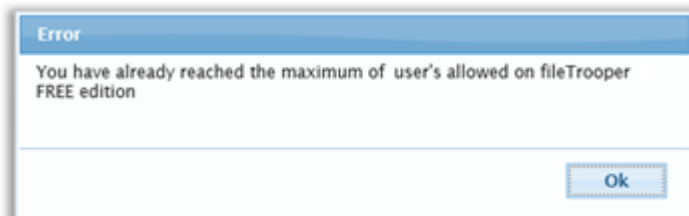
When you reach the maximum of registered users it's no more possible, for new user, to start the add-in. If you need to be able to run more users, you may request additional licenses through the 'license manager' function.
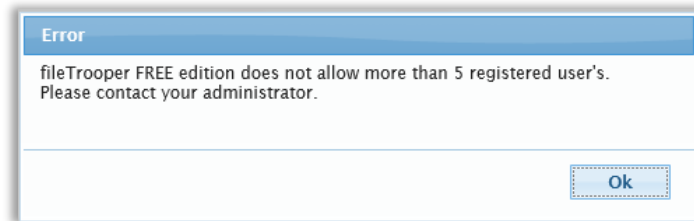
This message appears when fileTrooper detects an issue with the number of registered users stored in the application settings. If this error appear you should contact your administrator to investigate if somebody has altered the list.
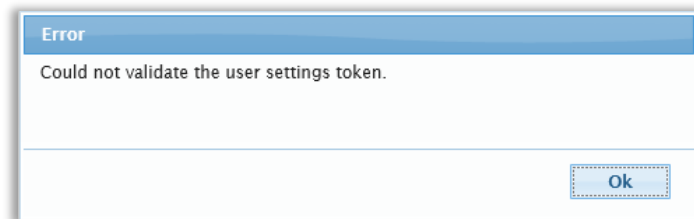

fileTrooper could not load and validate your user settings. This could append on several situation:

- Somebody altered your user settings.
- You executed the standard version of fileTrooper and a backup of your previous user settings were restored.
- User settings were duplicated/restored from an another site.

To resolve this issue, contact the site owner to unregister your user. Or completely uninstall the add-in and cleanup the 'fileTrooper backup'.
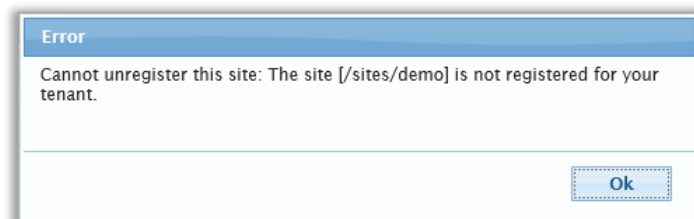
You tried to unregister your current site collection but it has been rejected by our service. This could happened if somebody else has unregistered the site at the same time and started fileTrooper on a new location within your organization.
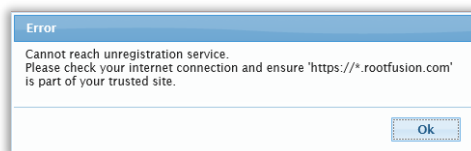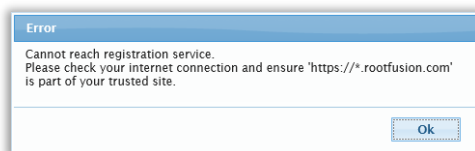
The registration service could not be reached either because the ROOTFUSION website needs to be trusted or because the service is actually unreachable.

Consider to check your trusted sites before contacting ROOTFUSION support.

SharePoint Version Compatibility

	SP On-Premise	Online
View documents of different sites collections libraries	2016+	✅
Create, rename, copy, move, delete folder	2016+	✅
Create, rename, copy, move, delete document or shortcut	2016+	✅
Upload document(s)	2016+	✅
Upload document by chunk	2019	✅
Edit document properties	2016+	✅
Document preview (.txt, images)	2016+	✅
Office document preview	2016+ (require Office Online Server installed on server)	✅

fileTrooper User Manual © ROOTFUSION

Document tracking (version history, checkout, checkin, discard checkout)	2016+	✓
Grid functionalities	2016+	✓
Routing functionalities	2016+	✓
Search	2016+ (may require admin configuration)	✓

Hardware and Software Requirements

Hardware

A desktop with at least 1024x768 and 2Gb of memory.

Browser

This SharePoint app has been tested on:
Microsoft Internet Explorer 11 or later
Microsoft Edge
Google Chrome

But it could be executed on any browser that supports ECMAScript 5.1, HTML5, and CSS3.

SharePoint

Minimum version: SharePoint On line 2016.

Legal notices

Licensing: terms of use

The software belongs to the company ROOTFUSION. Please read carefully the licensing terms of use, located on our web site. If you do not agree to comply with the licensing terms of this software, then you are not allowed to use this software, exposing yourself and/or your employer to legal penalties. Note also that the licensing terms may be adapted by ROOTFUSION without notification. The current applied licensing terms can be either found on ROOTFUSION's web site, or can be requested via email (info@rootfusion.com)

No Liability

ROOTFUSION is not responsible of data loss, or any problem caused by this software.

Copyright

You are not authorized to copy or distribute this document, or any part of it, without a prior formal written approval of the company ROOTFUSION. By the same way, you are not authorized to copy, sell or distribute the software fileTrooper or any part of it.
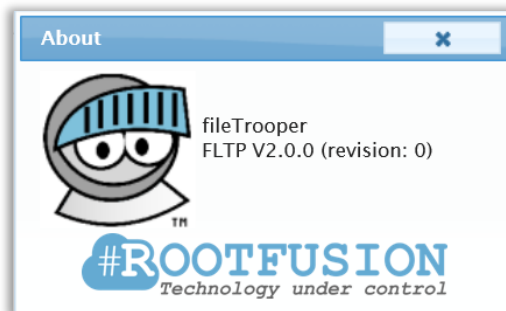
Trademark

All company and/or product name cited in this document may be trade names, trademarks and/or registered trademarks of the respective owners with which they are associated.