

Colligo Contributor File Manager 4.4

User Guide



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INTRODUCTION

Welcome to Colligo Contributor File Manager, the program that helps increase SharePoint adoption by seamlessly linking your SharePoint document libraries to the familiar Windows Explorer interface. Local folders become “SharePoint aware,” providing easy access to SharePoint features such as metadata, content types, and document templates. Folders can also be easily accessed from any application that uses the standard Windows File Open/Save dialog. SharePoint files can be added and edited using familiar desktop operations.

Benefits

Colligo Contributor File Manager helps:

- Empower users to easily manage email and documents in SharePoint
- Increase the quantity of content captured and tagged in SharePoint
- Make SharePoint accessible directly from the desktop
- Drive mobile and remote workforce productivity with easy offline access
- Improve collaboration, and document project management
- Improve records retention to reduce risk and improve compliance

Features

Colligo Contributor File Manager lets you:

- Drag-and-drop documents to SharePoint
- Navigate to cached SharePoint content
- Sync documents, document sets, libraries, or entire SharePoint sites
- Open, save, organize, and classify SharePoint files directly from Windows Explorer

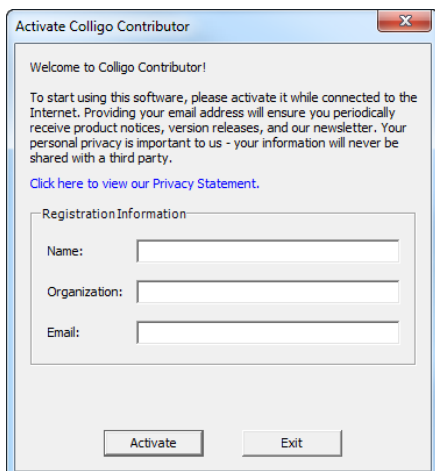
Platforms Supported

- Microsoft SharePoint Server 2010, MOSS 2007, or SharePoint Portal Server (SPS) 2003
- SharePoint Foundation Microsoft Windows SharePoint Services (WSS) 3.0, or 2.0
- SharePoint 2010 Online (Office365)
- Outlook 2007 and 2010 (32-bit and 64-bit)
- Windows XP Professional, Windows Vista, or Windows 7

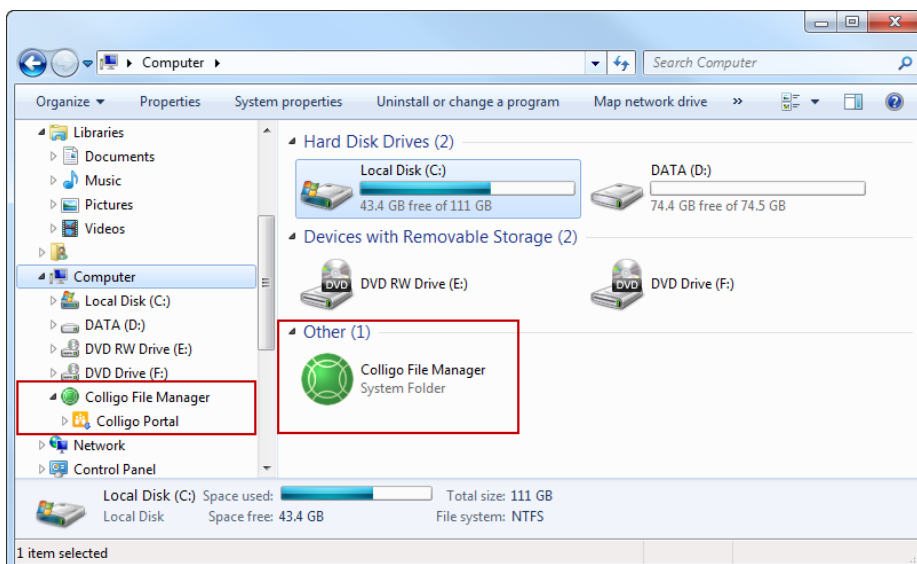
INSTALLING AND ACTIVATING CONTRIBUTOR FILE MANAGER

To install and activate Contributor File Manager:

1. Double-click to open the zip file and extract the contents.
2. In the folder, double-click the folder that corresponds to your operating system:
 - a) **x64**: choose this option if you have a 64-bit operating system
 - b) **x86**: choose this option if you have a 32-bit operating system
3. Double-click either Setup.exe or .msi.
4. Follow the steps in the install wizard.
5. After the install is complete, the following dialog displays:



6. Enter your information and click **Activate**.
After Contributor File Manager is installed, a new group called **Colligo File Manager** displays as a location in Windows Explorer:

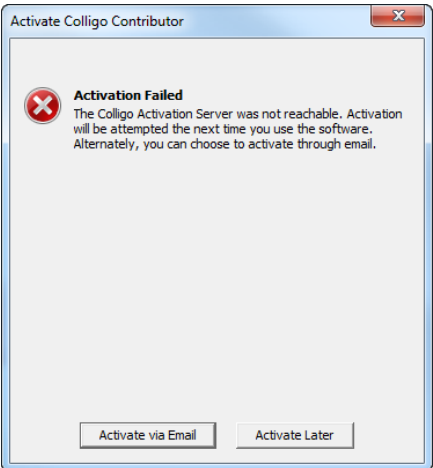


NOTE: If the Colligo File Manager icon is not visible in Windows Explorer after installation, you may need to configure your options. See the following Knowledge Base article for instructions:

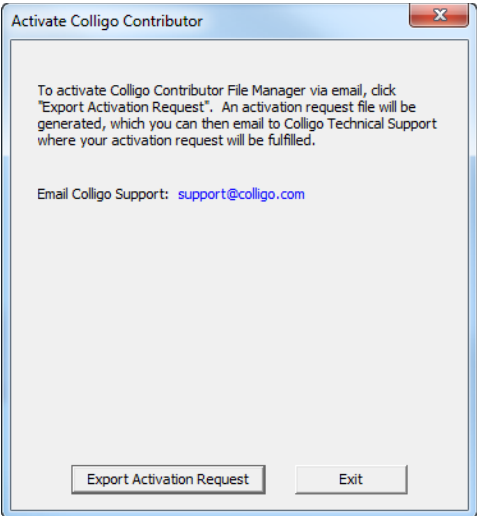
<http://www.colligo.com/support/kb/file-manager-icon-not-visible-in-windows-explorer/>

Activating Contributor File Manager Manually

If you are unable to connect to the activation server, the following error message displays:



Click **Activate via Email** to create an activation request file. The following dialog displays:

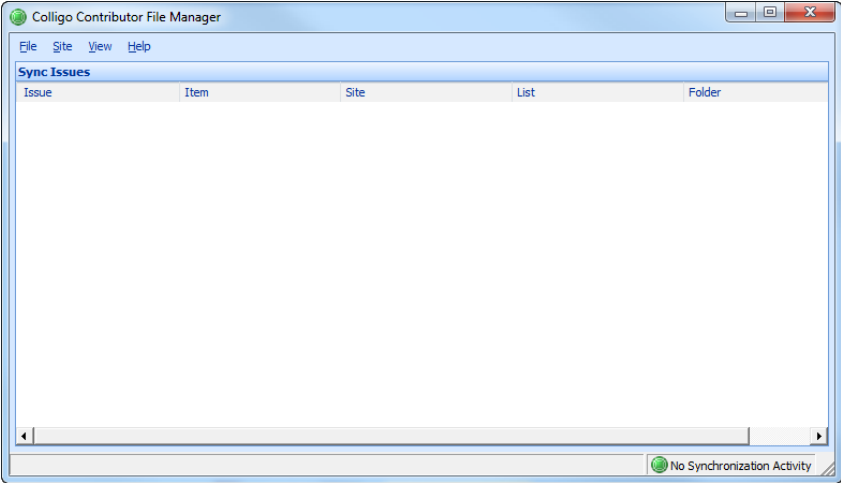


Click **Export Activation Request**. This creates a .txt file that you can save anywhere on your machine, and then attach to an email that you can send to Colligo to request a manual activation.

Using the Contributor File Manager Control Panel

The other part of Contributor File Manager is the Control Panel. This is a separate interface that displays in its own window. From here you can locate and configure options and see any sync issues such as conflicts or files being locked.

To display the Control Panel, open Colligo Contributor from your **Start** menu or from the system tray icon:



Checking for Updates

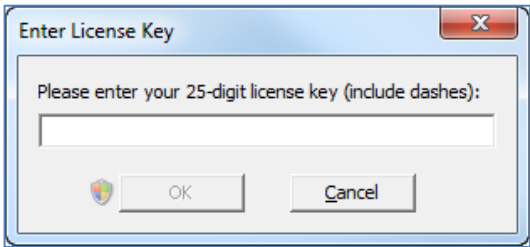
In the Contributor File Manager Control Panel, you can check if you are using the most current version of the program:

1. From the **Help** menu, select **Check for Update**. The www.colligo.com site launches.
2. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

Updating Your License Key

In the Contributor File Manager Control Panel, you can change your license key:

1. From the **Help** menu, select **Install License Key**.
2. The **Enter License Key** dialog displays. Enter your new license key and click **OK**.



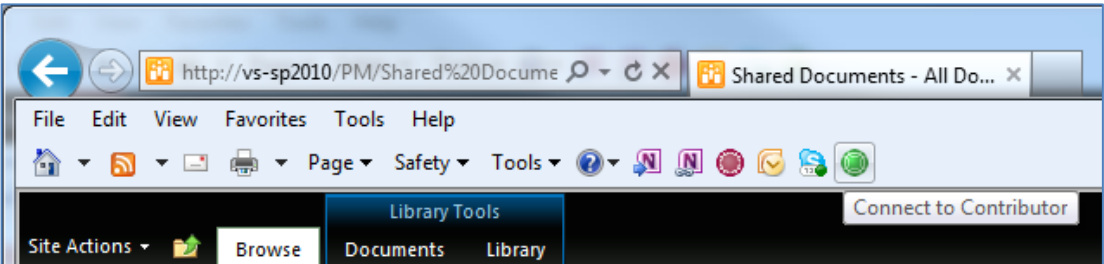
CONNECTING SHAREPOINT SITES

You can add a SharePoint list or library to Contributor File Manager in one of two ways:

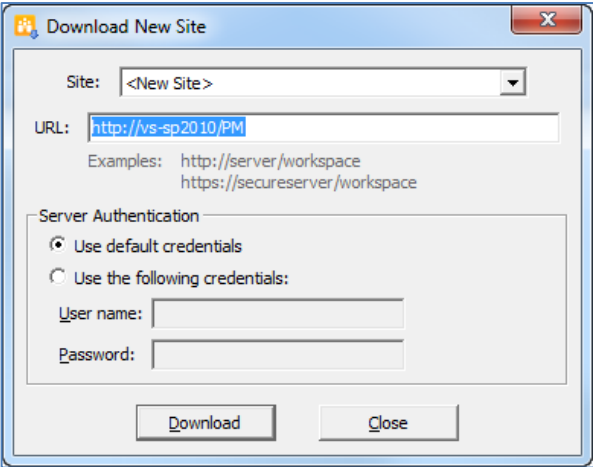
- Using the **Connect to Contributor** option in Internet Explorer
- Using the **Download New Site** option

Using the Connect to Contributor Button

1. Navigate to a SharePoint List or Library in Internet Explorer.
2. Click the green **Connect to Contributor** icon on the toolbar.

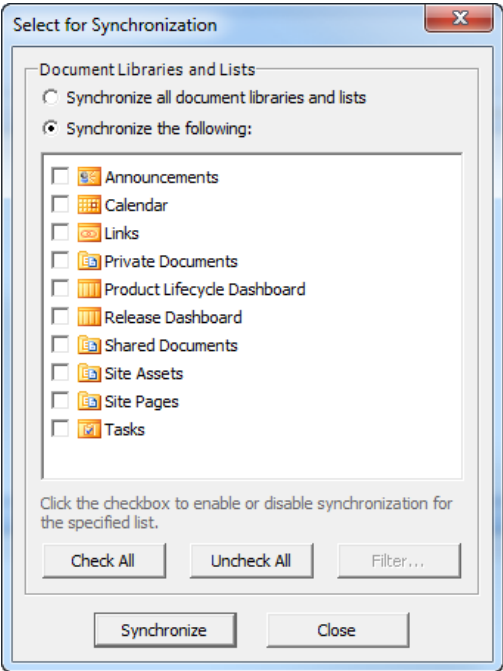


3. The **Download New Site** dialog displays. Select either your default Windows credentials, or supply other user-specific credentials.

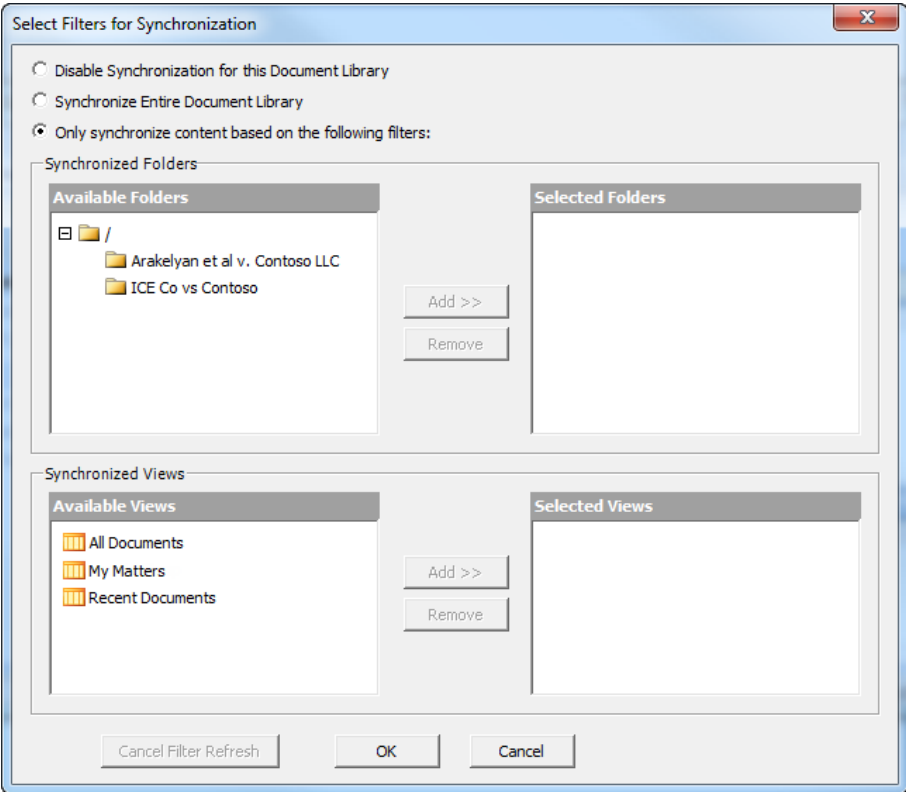


4. Click **Download**.

The **Select for Synchronization** dialog displays the lists and libraries you have permissions for:



- 5. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
- 6. Click **Filter** to select which folders and views you want to synchronize. The **Select Filters for Synchronization** dialog displays:

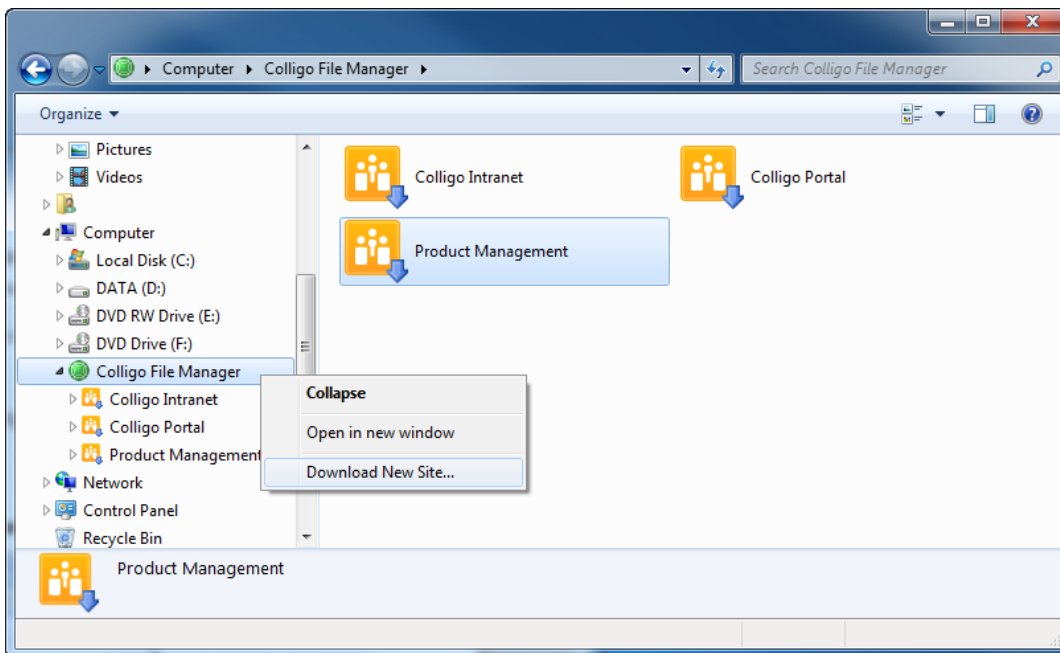


7. Choose from the following options:
 - **Disable Synchronization for this Document Library:** choose this option if you do not want the document library to be available offline.
 - **Synchronize Entire Document Library:** choose this option if want to synchronize everything in the specified document library.
 - **Only synchronize content based on the following filters:** choose this option if you want to selectively choose what folders and views are synchronized. In the **Synchronized Folders** and **Synchronized Views** sections, select a folder or view you want to synchronize and click **Add** to move it to the **Selected Folders/Views** column.
8. Click **OK**.
9. Click **Synchronize**. The site displays under the **Colligo File Manager** group in Windows Explorer.

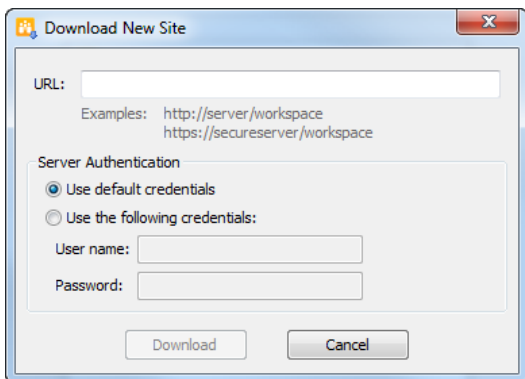
Using the Download New Site Dialog

To connect a site from the Windows Explorer interface:

1. Right-click the **Colligo File Manager** node and select **Download New Site** from the contextual menu.

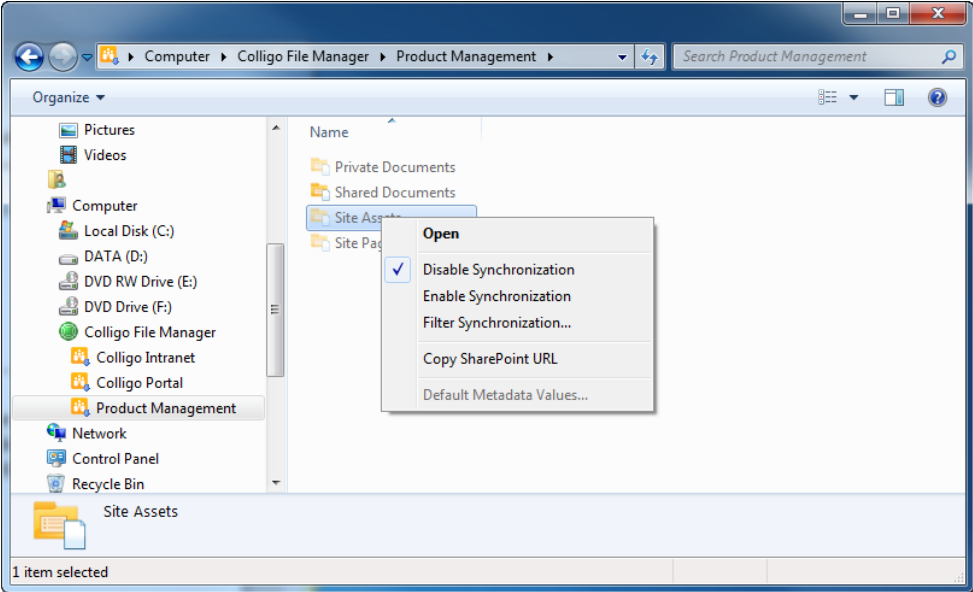


The **Download New Site** dialog displays:



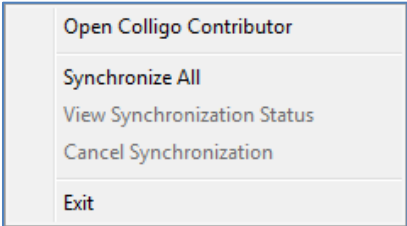
2. Enter the URL of the site and use your default credentials, or user-specific credentials.

- 3. Click **Download**.
The site displays under the **Colligo File Manager** node in Windows Explorer. However, the site's lists and libraries are not synchronized at this point and display as greyed out in Windows Explorer.
- 4. To synchronize a list or library, right-click it and select **Enable Synchronization**. To select filters for synchronization, right-click a list or library and select **Filter Synchronization**.

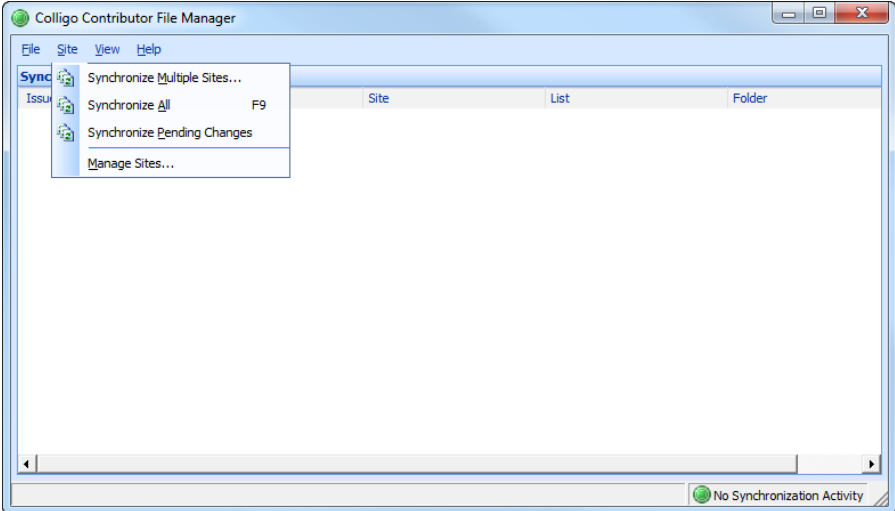


After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:

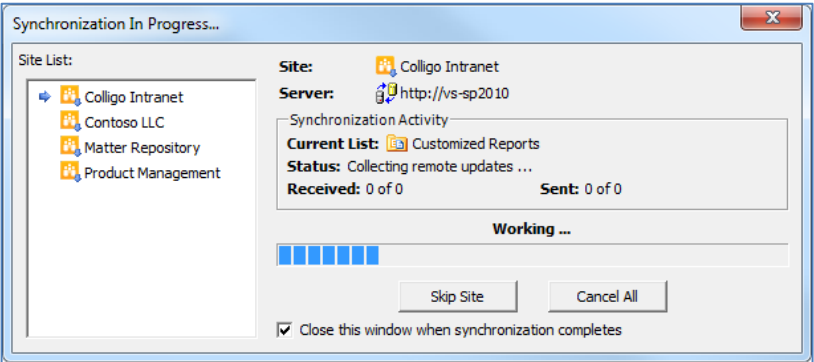
- Right-click the Contributor File Manager icon in the system tray and choose **Synchronize All**:



- From the **Site** menu in the Contributor File Manager Control Panel, choose one of the following options:
 - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the **Synchronize Multiple Sites** dialog, check your preferred sites and click **Synchronize**.
 - **Synchronize All**: choose this option to synchronize all sites
 - **Synchronize Pending Changes**: choose this option to synchronize changes you have made



5. The **Synchronization In Progress** dialog displays for any of the above options:



Completing a Full Synchronization

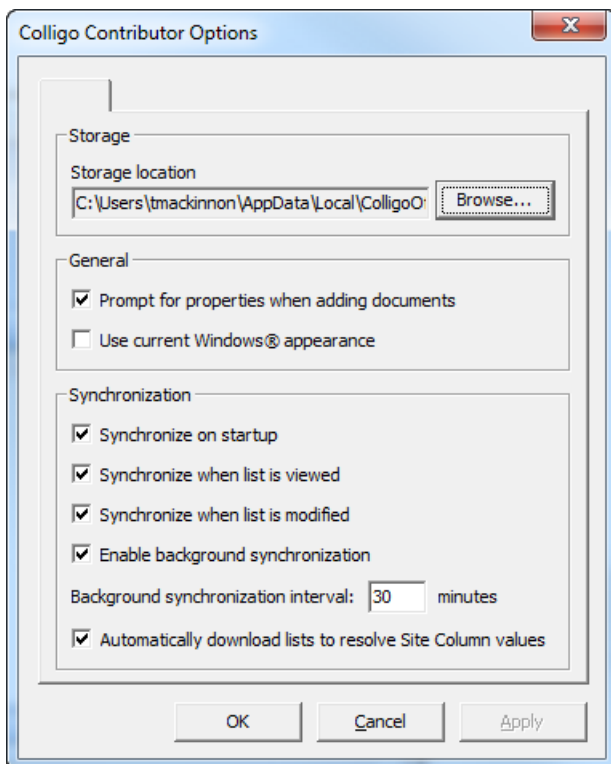
Several of the synchronization dialogs have a **Perform Full Synchronization** option. This option means that additional information is downloaded, including definitions for Sites, Lists, Views, and Content Types, plus other site content that may not be retrieved during other standard sync processes.

Configuring Synchronization Settings

The synchronization settings for Contributor File Manager are set in the Control Panel.

1. From the **View** menu, select **Options**.

The **Colligo Contributor Options** dialog displays:



2. In the **General** section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring Default Metadata; see **Setting Default Metadata**.
3. In the **Synchronization** section, choose your preferred options:
 - a. **Synchronize on startup**: choose this option if you want your lists and libraries to synchronize every time File Manager starts
 - b. **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time a list or library is viewed
 - c. **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time a list or library is modified
 - d. **Enable background synchronization**: choose this option if you want to set the synchronization to happen in the background on a time-specific basis, and enter your preferred time interval
 - e. **Automatically download lists to resolve Site Column values**: if you have lists that reference other lists (look-ups), checking this option ensures the related referenced lists are also downloaded

NOTE: Depending on how your IT Administrator has configured the File Manager installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

CREATING NEW CONTENT

After you have added your sites and synchronized your lists and libraries, the content is cached (available offline). You can now open and edit SharePoint items, check items in and out of SharePoint, as well as rename and delete items.

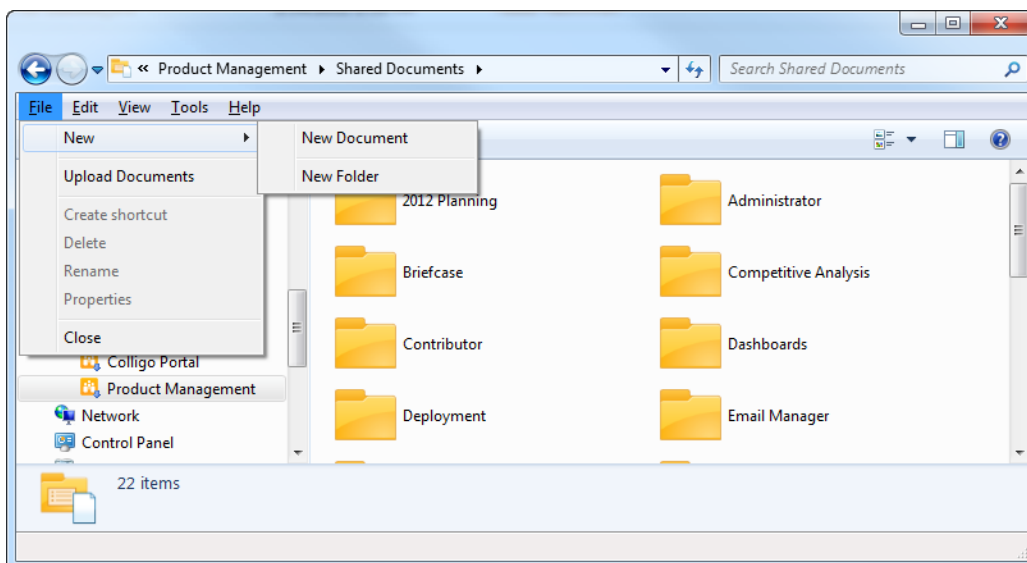
You can add items to Contributor File Manager in one of the following ways:

- Add a new document from within the Contributor File Manager interface
- Upload existing content
- Drag-and-drop or copy-and-paste content
- Use the **File > Save As** command

Adding a New Document to a List/Library

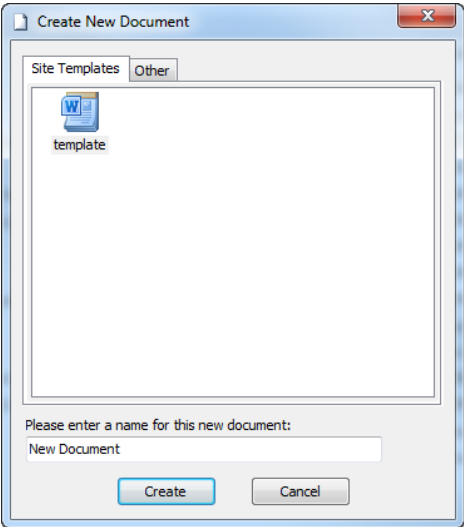
From within Windows Explorer, you can create and add a new document to a SharePoint location:

1. From the **File** menu, choose **New > New Document**:



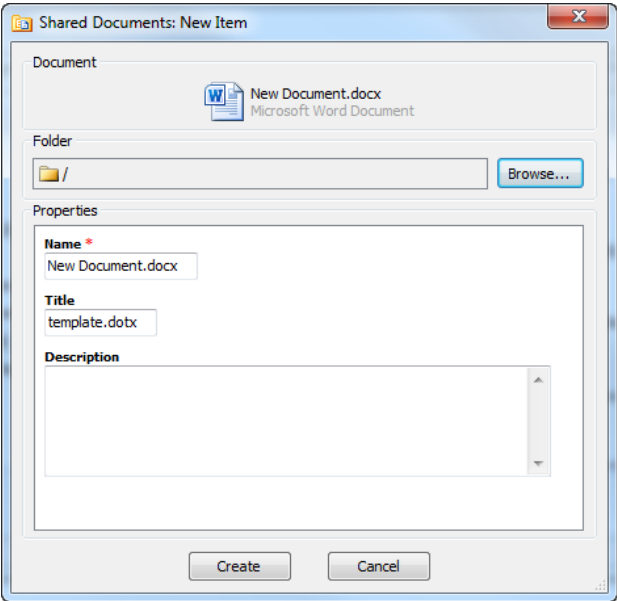
NOTE: if you cannot see the **File** menu, press the **Alt** key to display it.

The **Create New Document** dialog displays:



- 2. Choose your document type from the **Site Templates** tab or the **Other** tab.
- 3. Enter a name for the document, and click **Create**.

The **New Item** dialog displays.

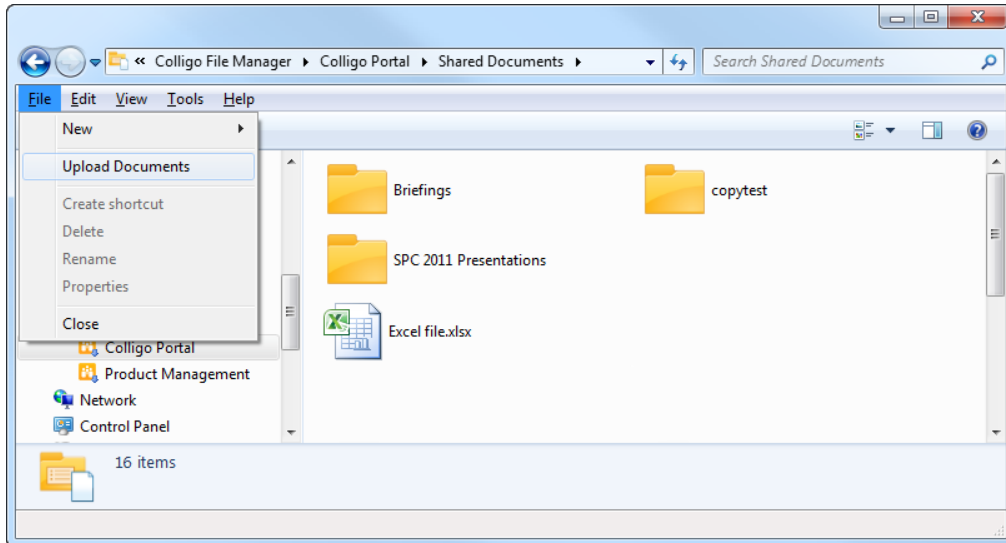


- 4. This dialog is where you can record information about the document. Edit as preferred.
- 5. Click **Close**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

From within Windows Explorer, you can upload existing documents to your preferred SharePoint location:

1. From the **File** menu, choose **Upload Documents**:



NOTE: if you cannot see the **File** menu, press the **Alt** key to display it.

The **Upload Documents** dialog displays.

2. Browse to the document that you want to upload, and click **Open**. To select more than one document, use Ctrl + click.
3. The **New Item** dialog displays. Edit as preferred and click **Create**.
The document is added to the SharePoint location. If you have selected more than one document, any properties you assign apply to all items.

Dragging-and-Dropping Content

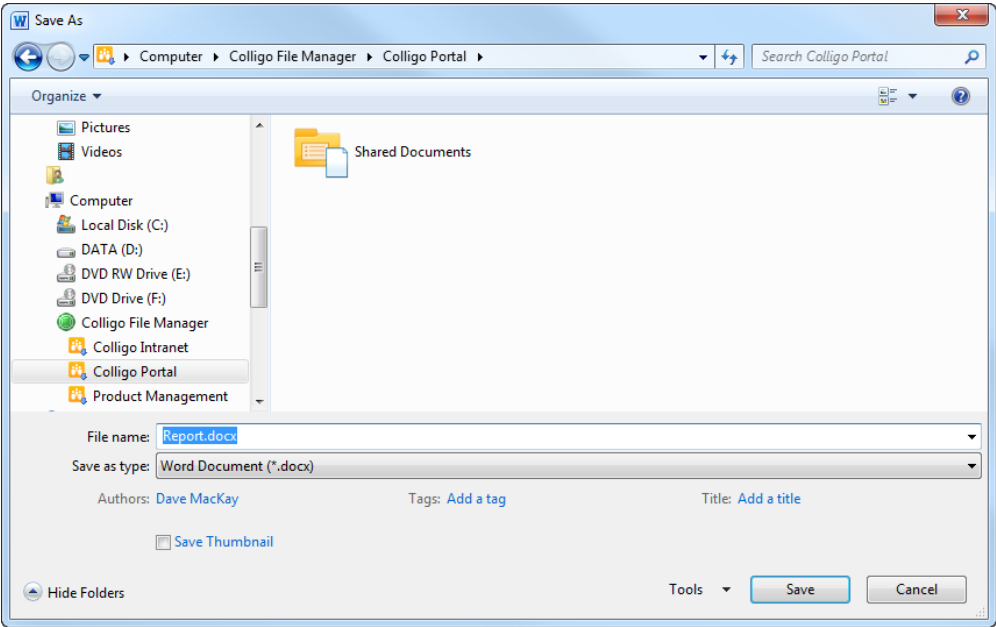
You can drag-and-drop one or more files or complete folder structures into File Manager from your desktop or from other directory locations:

1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in Contributor File Manager.
2. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.
The file or folder is added to the SharePoint location. If you have selected more than one document or a folder, any properties you assign apply to all items.

Using the File Save As Command

You can use the **File > Save As** command from integrated programs to save directly into any of the SharePoint lists or libraries you have connected to Contributor File Manager:

1. In your open document, select **File > Save As**.
2. In the **Save As** dialog, navigate to your SharePoint location, edit the file name as needed, and click **Open**:



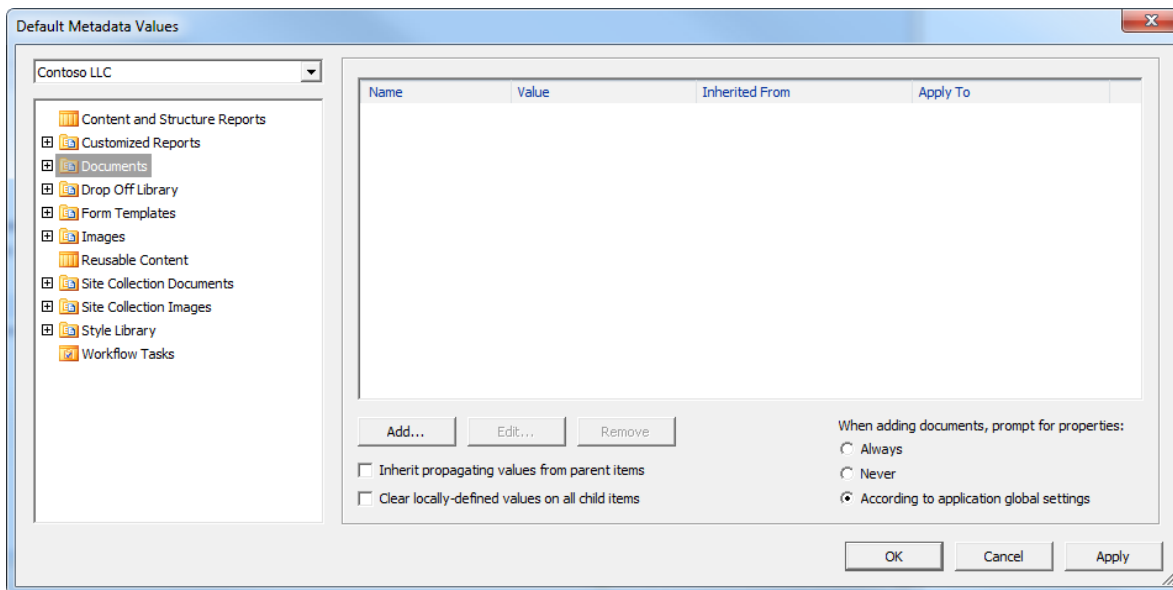
3. The **Edit Properties** dialog displays. Edit as preferred and click **Close**. The document is added to the SharePoint location.

Setting Default Metadata

If you want to tag all documents and items that you add or upload to a list or library with the same metadata, you can set default metadata values through the Contributor File Manager interface:

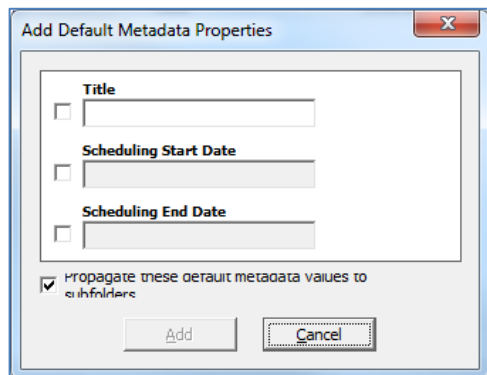
1. From the Control Panel **File** menu, choose **Default Metadata Values**.

The **Default Metadata Values** dialog displays:



2. Select the site and library/list that you want to configure.
3. To add a metadata tag, click **Add**.

The **Add Default Meta data Properties** dialog displays, displaying the metadata field options that are set in the document library in SharePoint.



4. Enter your preferred tags and click **Add**.
5. If you want the values to propagate to any subfolders, check the **Propagate these default metadata values to subfolders** box.
6. To configure the metadata prompt behavior, choose a radio button on the right under the **When adding documents, prompt for properties** section:
 - **Always**
 - **Never**
 - **According to application global settings** (as set in step 2 in **Configuring Synchronization Settings**)