

Colligo Contributor Pro 4.6

User Guide



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Introduction

Welcome to Colligo Contributor Pro. Easily file, tag, view, and share documents, emails and attachments in SharePoint, offline. Colligo Contributor Pro includes Colligo Contributor Add-in for Outlook, Colligo Contributor File Manager, and Colligo Contributor Client in a single, value-priced bundle.

Benefits

- Empower users to easily manage email and documents in SharePoint
- Increase the quantity of content captured and tagged in SharePoint
- Easily access SharePoint from Outlook and Windows Explorer
- Drive mobile and remote workforce productivity with easy offline access
- Improve collaboration, and document and project management
- Reduce risk and improve compliance

System Requirements

Software Requirements

Colligo Contributor requires the following software:

- Windows XP Professional
- Windows Vista
- Windows 7
- Windows 8

Client Software Requirements

Colligo Contributor has the following client software requirements:

- Microsoft .NET framework 3.5 Runtime
- Microsoft .NET framework 4.0. Runtime
- Integration with Microsoft Office requires Office 2003 or later
- Microsoft Office 2003 SP2, 2007, 2010, 2013
- Microsoft Office Primary Interop Assemblies (PIAs). Different versions of Office have different PIAs. PIAs must be deployed corresponding with the version of Office installed
- Microsoft Visual Studio 2005 Tools for Office Second Edition (VSTO 2005 SE) Runtime
- Microsoft Visual C++ 2010 SP1 Redistributable Package

Server Software Requirements

Colligo Contributor requires at least one of the following:

- Microsoft SharePoint Server 2010, MOSS 2007, or SharePoint Portal Server (SPS) 2003
- Microsoft SharePoint Foundation Microsoft Windows SharePoint Services (WSS) 3.0, or 2.0
- Microsoft SharePoint 2010 Online (Office365)
- Microsoft SharePoint 2013
- Microsoft FAST Search Server 2010 for SharePoint (Optional)

Installing Colligo Contributor

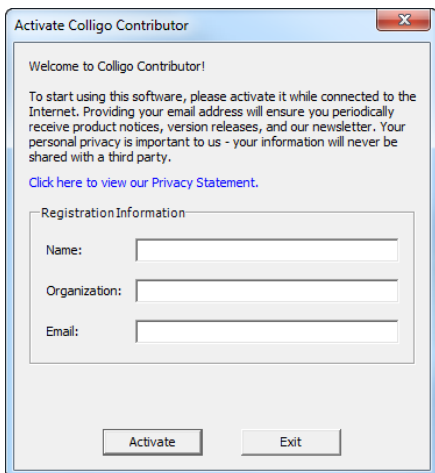
Colligo provides both an .exe installer and an .msi installer for Contributor.

There are different installer packages dependent on which Operating System you have installed:

- For a 32-bit Operating System, use the x86 installer
- For a 64-bit Operating System, use the x64 installer

To install and activate Contributor File Manager:

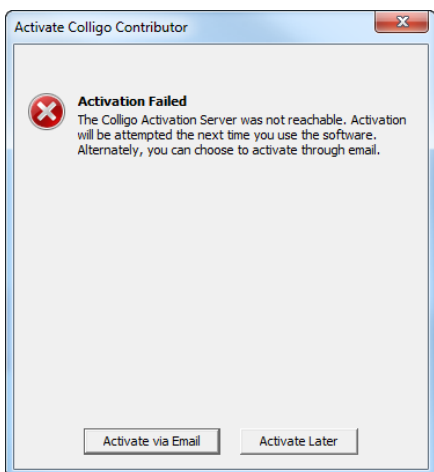
1. Double-click to open the zip file and extract the contents.
2. In the folder, double-click the folder that corresponds to your operating system:
 - a) **x64**: choose this option if you have a 64-bit operating system
 - b) **x86**: choose this option if you have a 32-bit operating system
3. Double-click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



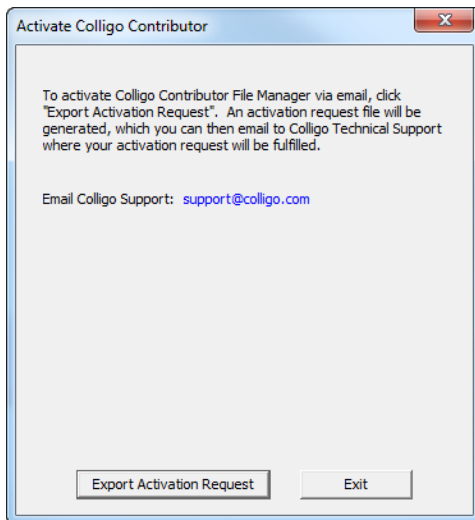
6. Enter your information to activate the software. If you do not activate Colligo Contributor Pro, it will not function.

Activating Colligo Contributor Pro 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.

Concurrent Version Installations

Colligo does not support side-by-side installations, running multiple versions or different versions of Contributor.

Version Reversion/Downgrading

It is not possible to revert to an earlier version of Contributor after upgrading as the database is often updated.

Contributor Client

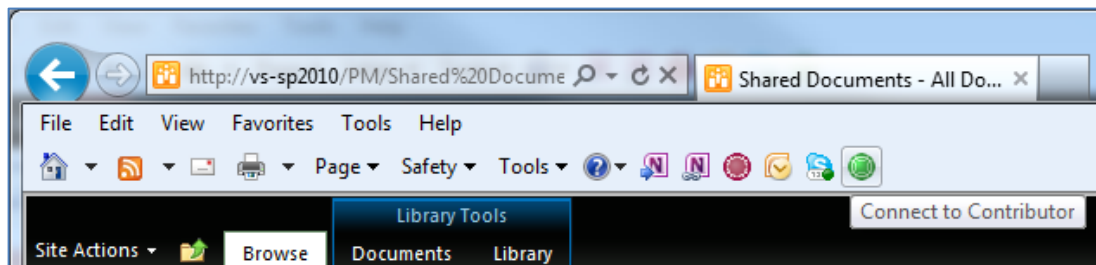
Connecting SharePoint Sites

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

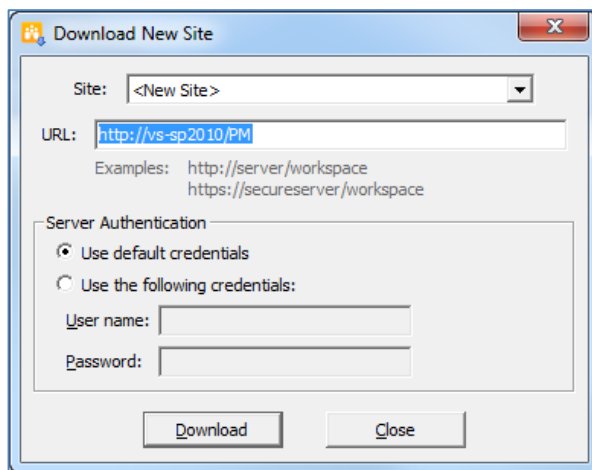
- Using the **Connect to Contributor** option in Internet Explorer
- Using the **Download New Site** option

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.

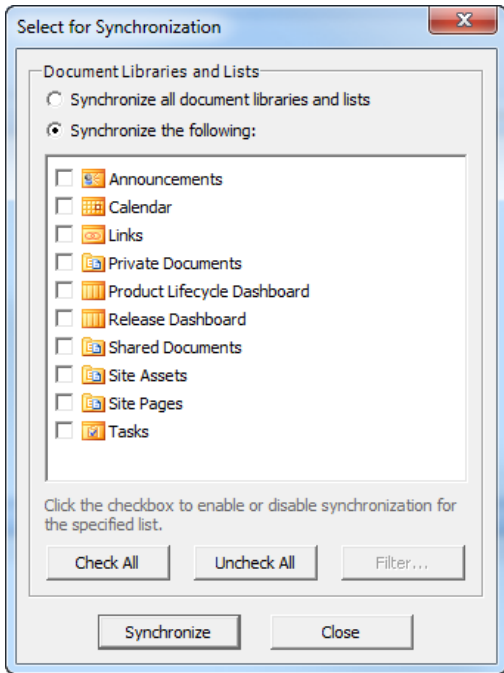


3. The **Download New Site** dialog displays. Select either your default Windows credentials, or supply other user-specific credentials.



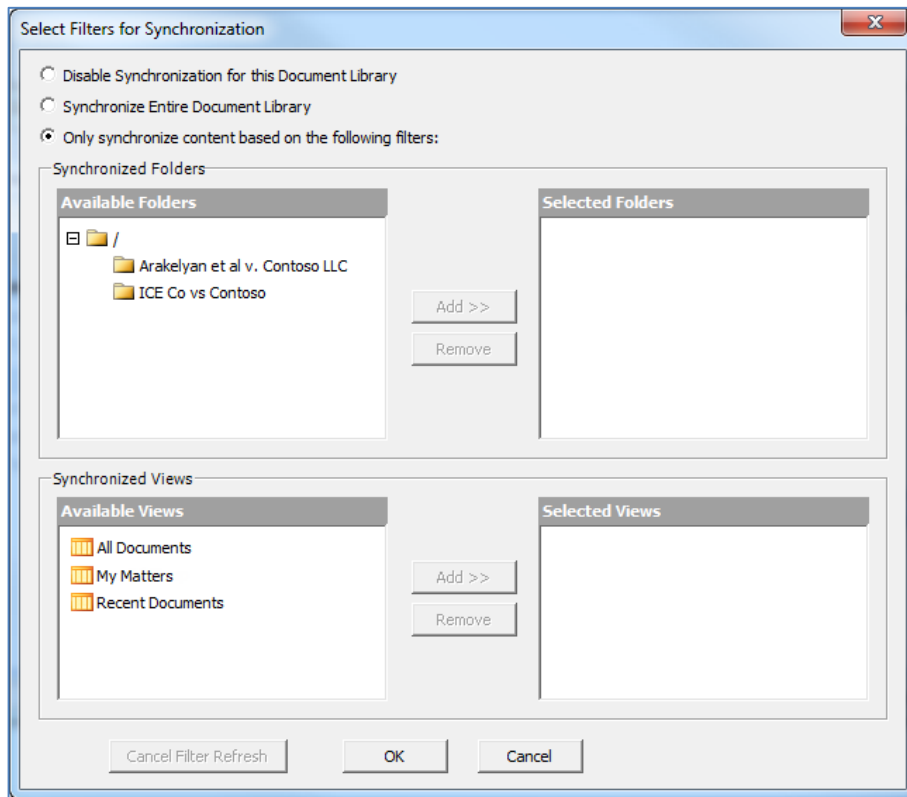
4. Click **Download**.

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:

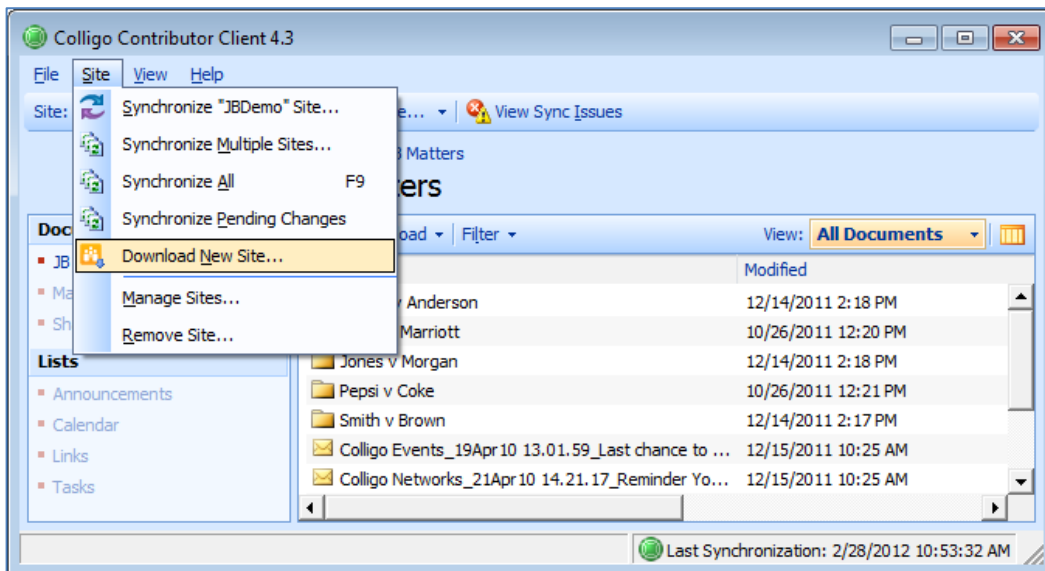


7. Choose from the following options:
 - **Disable Synchronization for this Document Library:** choose this option if you do not want the document library to be available offline.
 - **Synchronize Entire Document Library:** choose this option if want to synchronize everything in the specified document 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** to download the information for the lists and libraries you have selected.

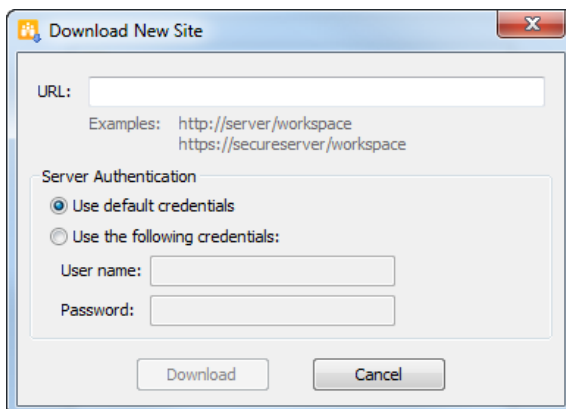
Using the Download New Site Option

To connect a site from within Colligo Contributor Client:

1. From the **Site** menu, choose **Download New Site**:



The **Download New Site** dialog displays:



2. Enter the **URL** of the site and enter your default credentials, or user-specific credentials.
3. See steps 4 to 9 of **Using the Connect to Contributor Button**.

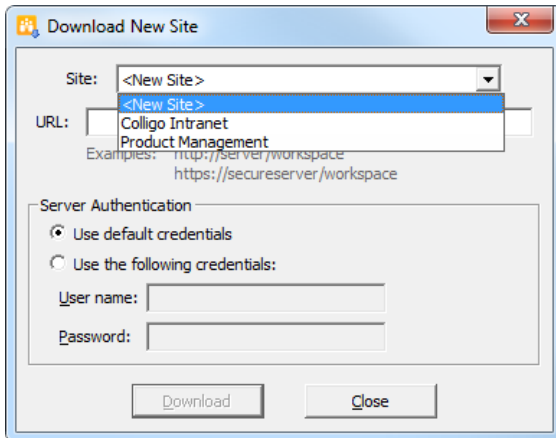
Editing Lists and Libraries

After you have added your site and chosen which lists and libraries you want to sync, you may want to go back at a later time and edit your choices. You can do this in one of two ways:

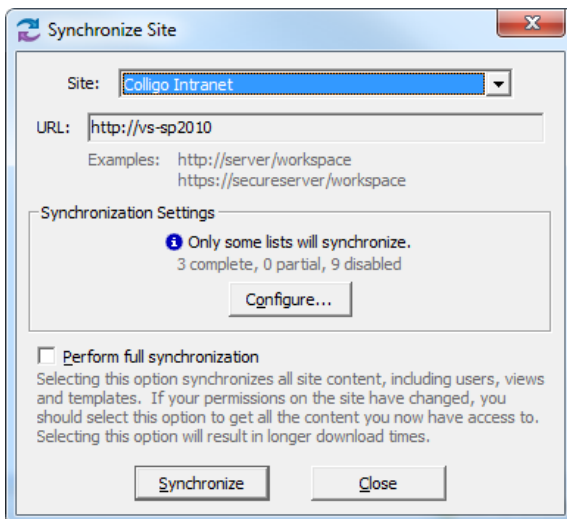
1. Right-click a list or library and select **Enable Synchronization** from the contextual menu. Then synchronize the site.

OR

1. From the **Site** menu, choose **Download New Site**.
The **Download New Site** dialog displays:



2. From the **Site** drop-down list, choose which site you want to configure.
The **Synchronize Site** dialog displays:



3. Click **Configure**.
4. In the **Configure Synchronization** dialog, choose which Lists and Libraries you want to sync.
5. Click **OK**.
6. Synchronize the new site.

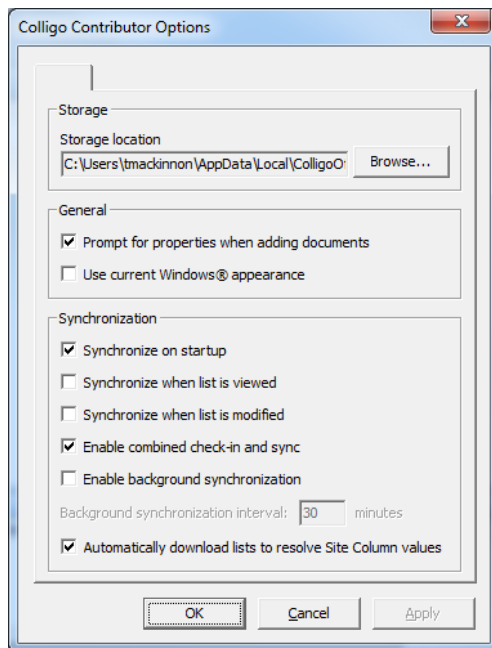
Setting Synchronization Options

In Contributor Client you can set your Synchronization options to your lists and libraries sync automatically. However, you can also perform manually syncs as well.

Configuring Synchronization Settings

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

The **Colligo Contributor Options** dialog displays:



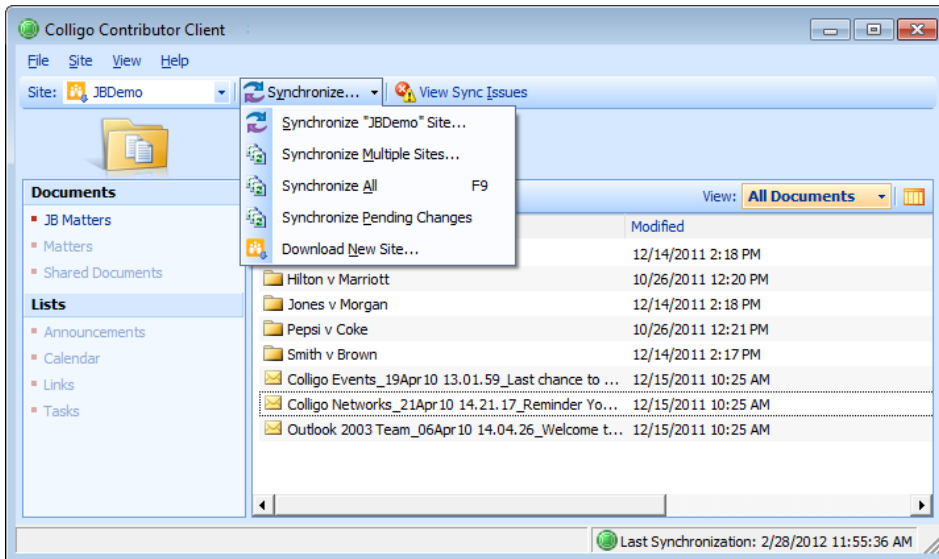
2. In the **General** section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring Default Metadata; see **Setting Default Metadata**.
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 Contributor Client starts
 - b. **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time you view a list or library
 - c. **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time you modify a list or library
 - d. **Enable combined check-in and sync**: choose this option if you want to combine the step of checking in a document and simultaneously syncing it
 - e. **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
 - f. **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 installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

Synchronizing Sites Manually

After you have added your sites, you may want to synchronize them manually, outside of the settings you set in the **Colligo Contributor Options** dialog:

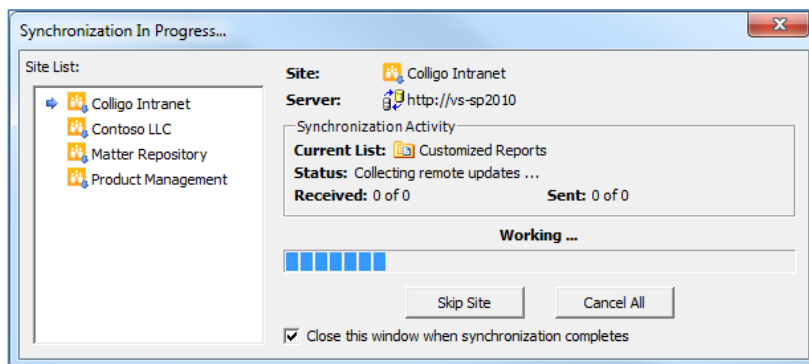
1. Click the **Synchronize** menu to display the options:



Choose from the following:

- **Synchronize Site:** select this option to synchronize the site currently displayed
- **Synchronize Multiple Sites:** select this option to display all sites and choose which ones you want to synchronize
- **Synchronize All:** select this option to synchronize all sites
- **Synchronize Pending Changes:** select this option to synchronize any lists or libraries containing changed content

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



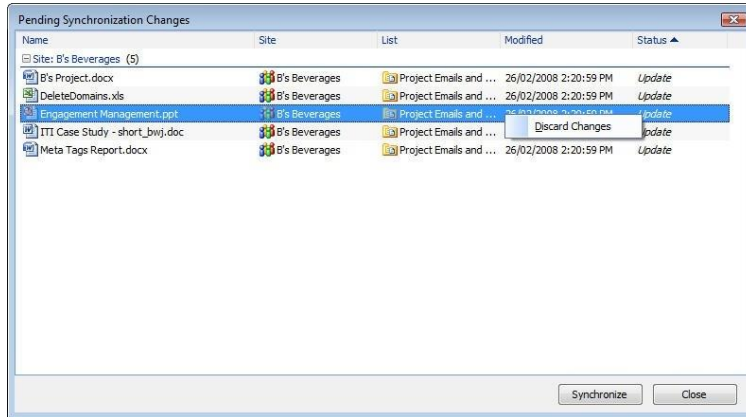
Completing a Full Synchronization

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.

Viewing and Synchronizing Pending Changes

You can review content that has changed since the last synchronization and then synchronize it:

1. From the **View** menu, select **View Pending Changes**.
The **Pending Synchronization Changes** dialog displays:

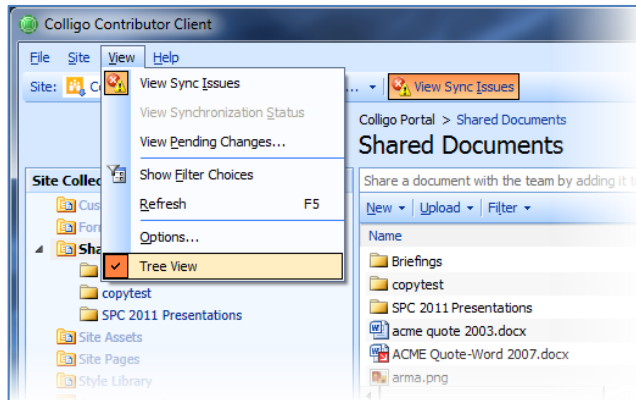


2. To discard the changes for a particular item, right-click it and choose **Discard Changes**. Discarded changes are reverted upon the next synchronization.
3. Click **Synchronize**.

Viewing, Editing, and Creating Content

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

The Tree View in Contributor Client allows you to view content more dynamically and to move and copy content between folders in the same SharePoint site using drag-and-drop. You can change the view by enabling or disabling the **Tree View** option in the **View** menu:

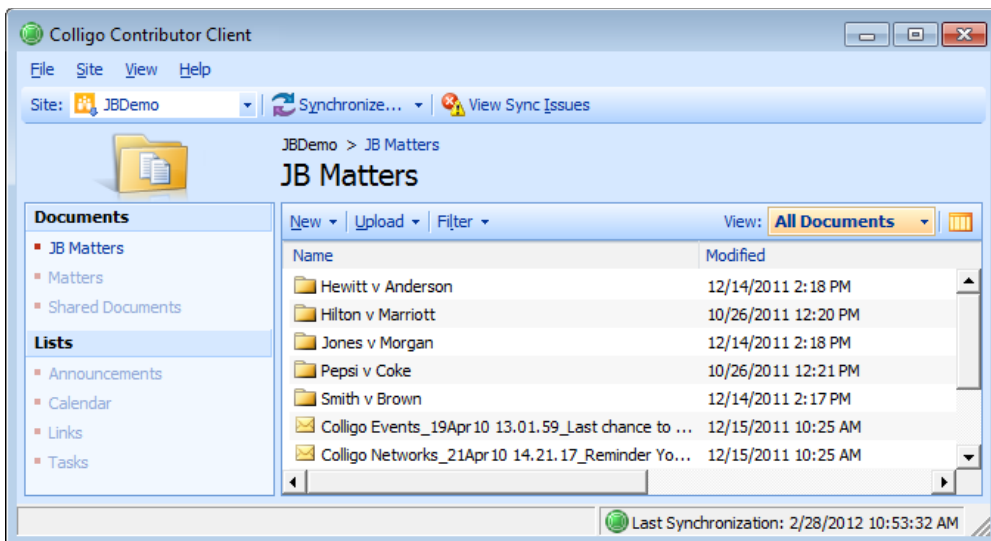


NOTE: you cannot enable or disable synchronization of document libraries or lists while Tree View is enabled. If you want to do this, you must turn off Tree View and work in List View.

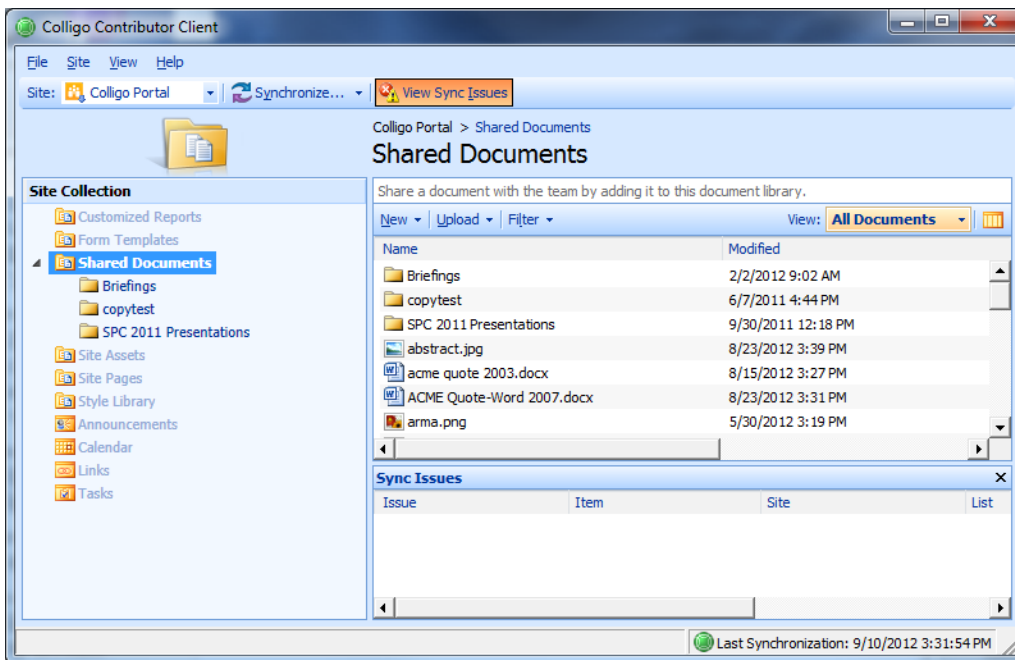
NOTE: If the Tree View option is not available to you, it has been disabled by your IT Administrator.

Viewing Content

After you have added and synchronized your sites, the libraries you have chosen to sync display in the left pane under the **Site Collection** heading; the contents of a selected library display in the right pane:



If **Tree View** is enabled, you can expand and contract folders in the left pane to navigate to the SharePoint location you are looking for. The folder that is highlighted in the Tree View indicates the SharePoint location you are currently viewing.



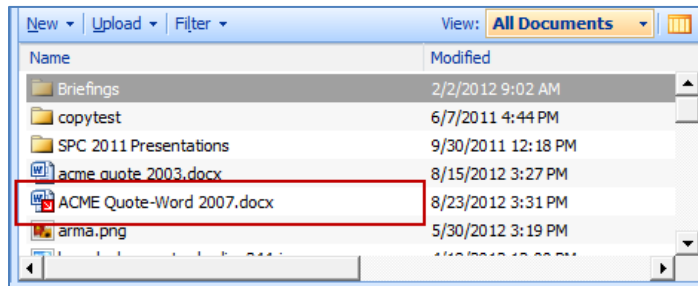
To view an item, double-click it to launch it in the item's native program. If the item is checked out by another user, it opens in Read-Only mode.

Editing Content

To edit an item, double-click it to open it in the item's native program. You can then edit the item as preferred, save it, and close it.

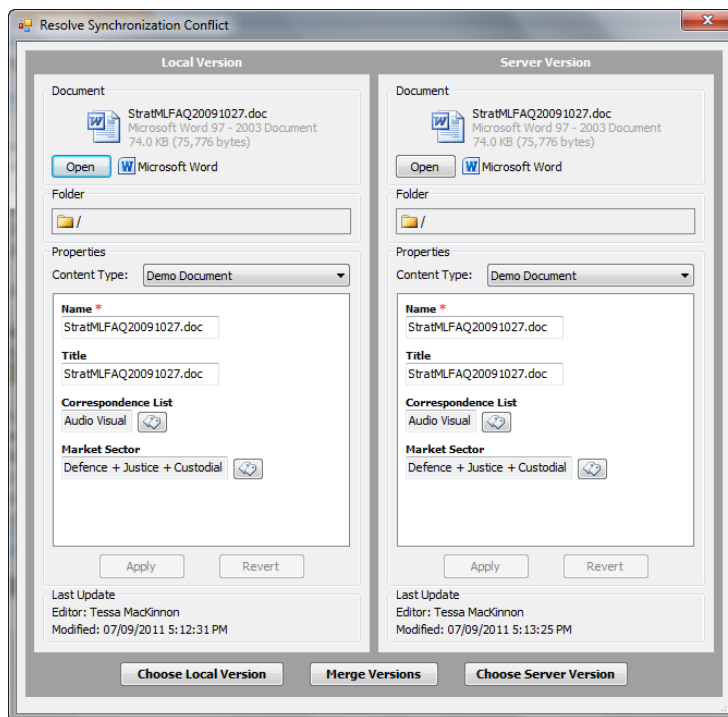
The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: you cannot edit an item if it is checked out by another user. If the item is checked out, a red arrow icon displays on the item:



Resolving Editing Conflicts

If another user has opened the document, edited it, and uploaded it to SharePoint, and you try to upload the same document with your changes, the following dialog displays:

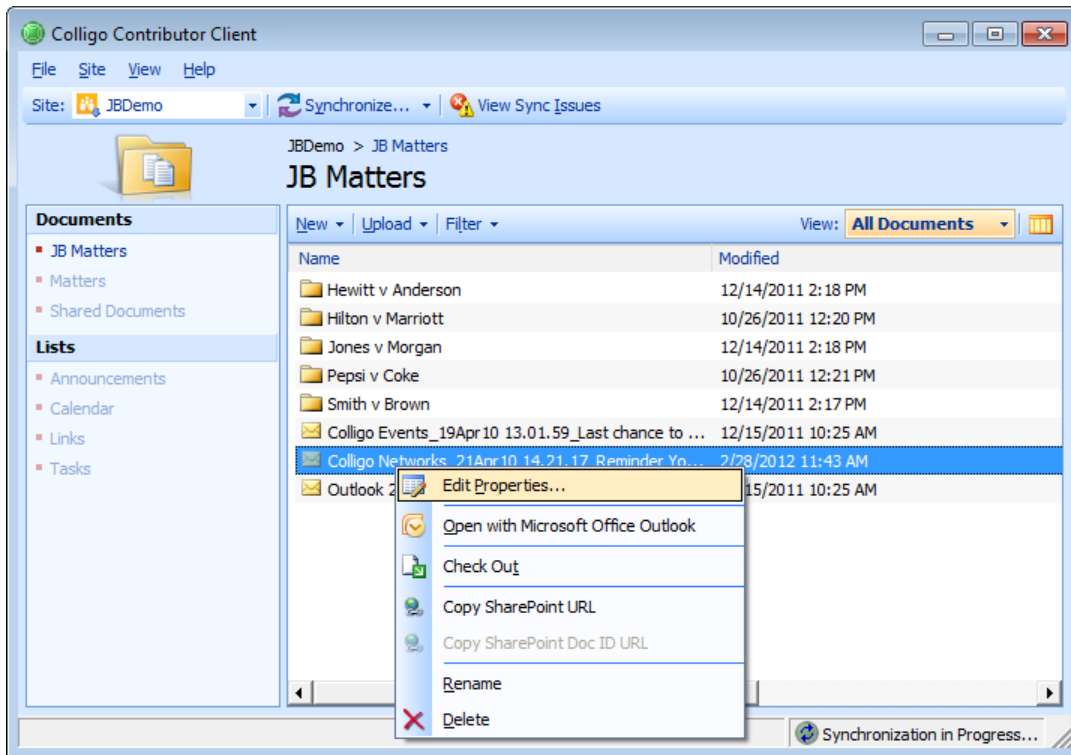


You can click **Open** to view the edits in each version, and then click one of the following options:

- **Choose Local Version:** if you choose this option, the version on your local machine overwrites the current version on SharePoint
- **Merge Versions:** If you choose this option, a wizard displays and walks you through a process to choose the changes you want to keep or discard
- **Choose Server Version:** if you choose this option, the version on SharePoint does not change; you are effectively discarding your version

Editing Item Properties

To edit the properties of an item, right-click it and choose **Edit Properties**:



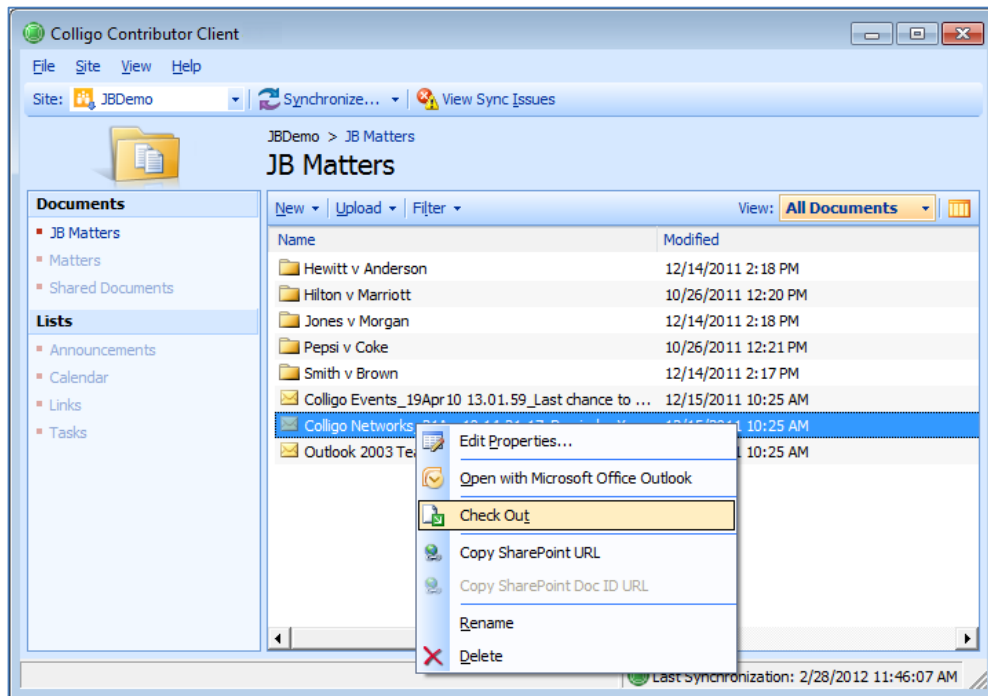
The **Edit Properties** dialog displays. Edit as preferred and click **Close**.


The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: you cannot edit an item's properties if it is checked out by another user. If the item is checked out, a red Check Out icon displays on the item.

Checking Items In or Out

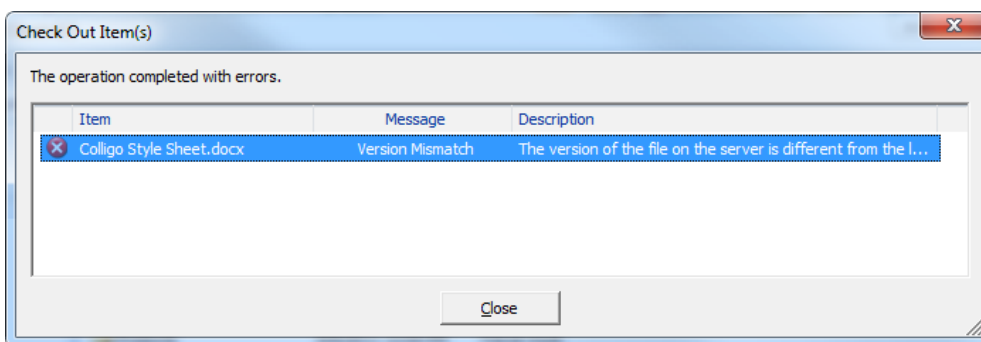
To check an item in or out, right-click it and choose **Check Out/In**. The **Check In** option only displays if you have previously checked the item out.



Once you have checked an item out, the Check Out icon is overlaid on top of the document type icon, so users can see that the item is being edited: 

After you have checked the item out, you can open it, edit it, and then check it back in to the list/library. The changes are uploaded to SharePoint the next time the list/library is synchronized.

NOTE: If you try to check out an item that has been modified in SharePoint and not synchronized, the following message displays:

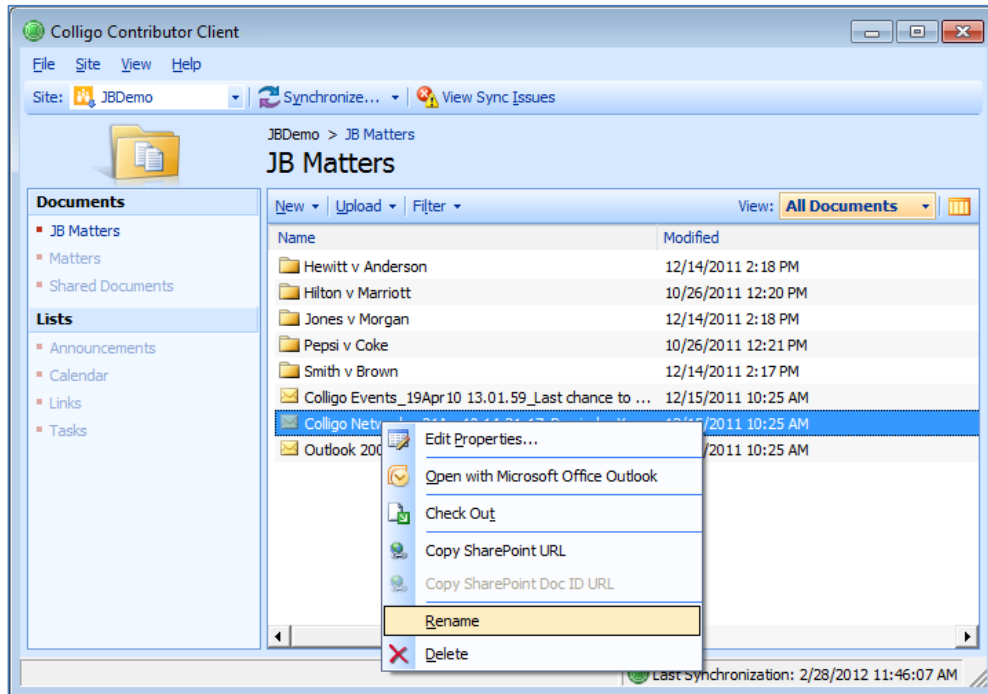


You need to close the dialog, synchronize the site so you have the most up-to-date version of the document, and then perform the Check Out operation again.

To avoid the above conflict, select the combined check-in and sync option as described in Error! eference source not found..

Renaming Items

To rename an item, right-click it and select **Rename**.



The item name becomes editable. Edit as preferred, and press **Enter** to complete the change.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot rename an item if it is checked out by another user. If the item is checked out, a red Check Out icon displays on the item.

Deleting Items

To delete an item, right-click it and select **Delete**.

The change is reflected in SharePoint the next time the list/library is synchronized.

NOTE: you cannot delete an item if it is checked out by another user. If the item is checked out, a red check-out icon displays on the item.

Creating New Content

In addition to editing existing content in SharePoint, you can also add new content to your synchronized lists and libraries.

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

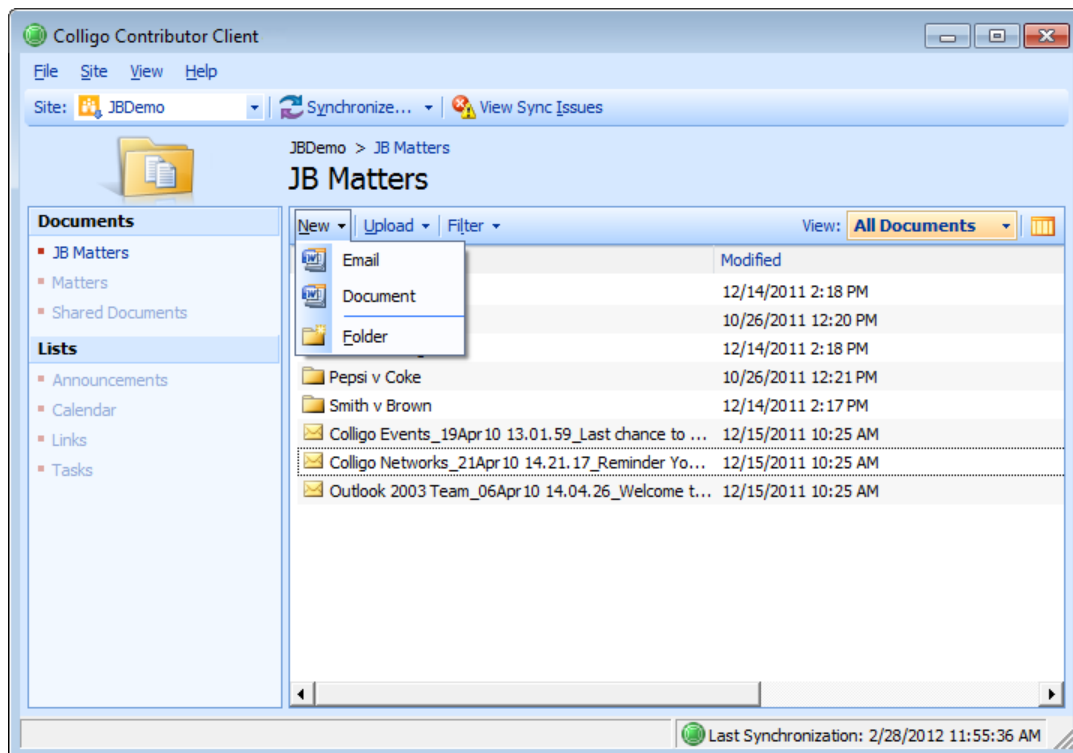
- Create new documents from within the Contributor Client interface
- Upload existing content
- Drag-and-drop or copy-and-paste content

When you are adding content from your Windows desktop or directory to SharePoint using the Client interface, the content is always copied to SharePoint. When you are moving content from one SharePoint location to another within the Client interface you have the option to move or copy the content; see **Moving or Copying Content within SharePoint**.

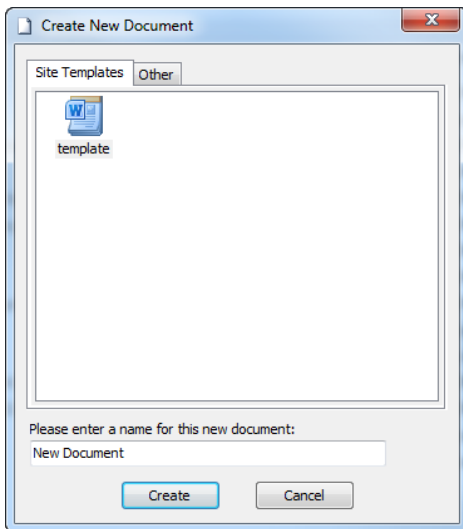
Adding a New Document to a List/Library

To add a new document to a list or library:

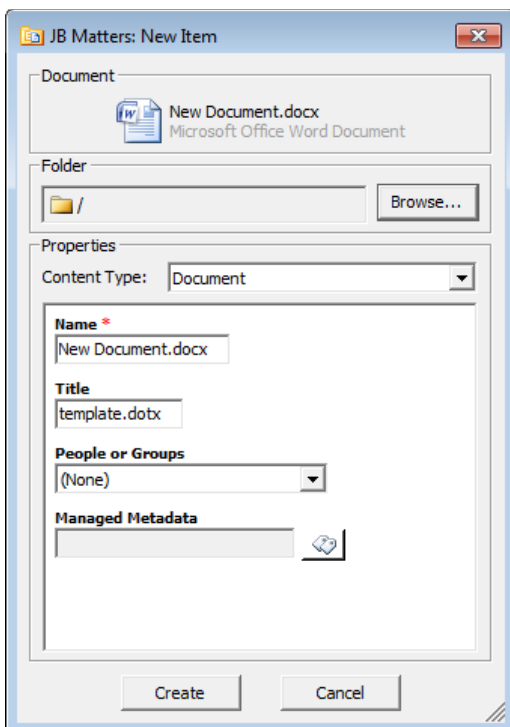
1. With the list or library you want to add the document to selected, click the **New** menu and select your preferred document type from the drop-down list:



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. This is where you can record information about the document that is stored in SharePoint as well as choose the location of the document (click **Folder** to browse the folders and subfolders in the list or library).
4. Edit the **New Item** dialog as preferred.

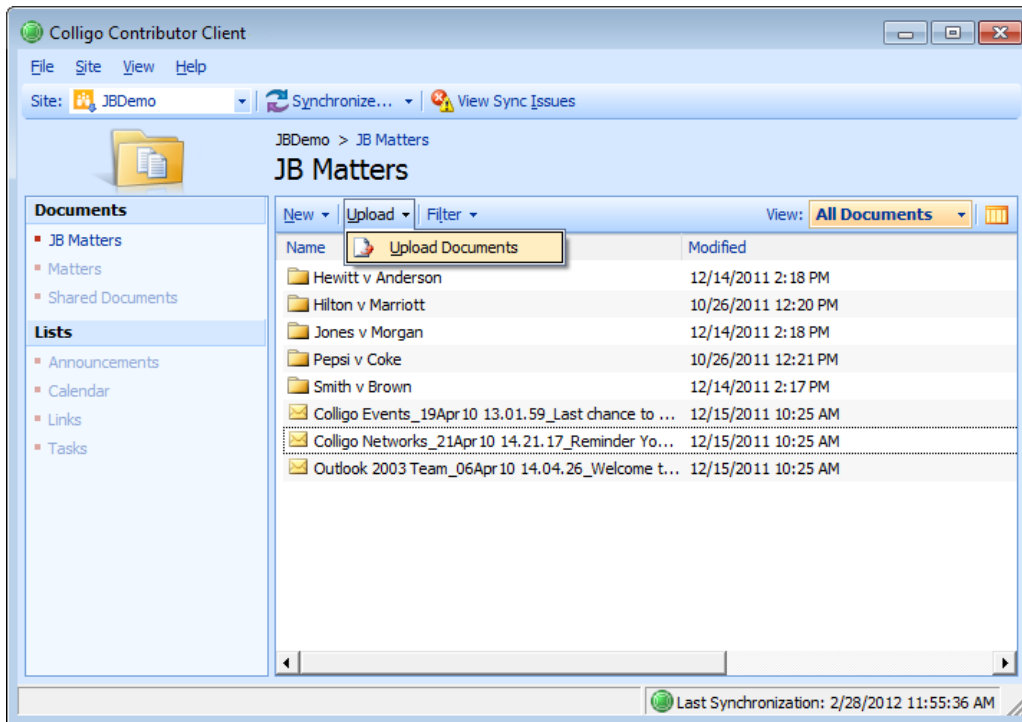


5. Click **Create**. The document is added to the SharePoint location.

Using the Upload Documents Dialog

To add an existing document to a list or library:

1. With the list or library you want to add the document to selected, click the **Upload** menu, and choose **Upload Documents**:



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 Contributor Client from your Windows 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 Client.
2. The **New Item** 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.

Moving or Copying Content within SharePoint

You can move or copy content from one location in SharePoint to another location, through the Contributor Client interface.

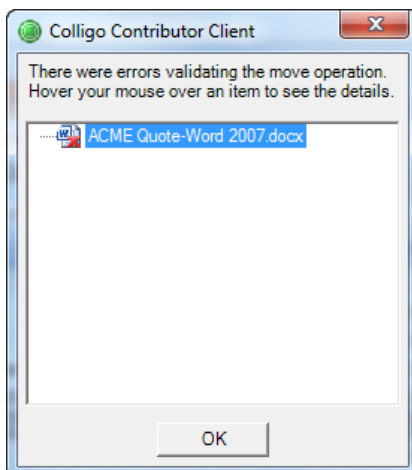
NOTE: this feature is disabled by default. Contact your IT Administrator.

1. Select one or more files in a library or folder, and drag-and-drop it to another folder. The **New Item** dialog displays.
2. Edit as preferred and click **Create**. The following dialog displays: (new screenshot needed)



3. Click **Move** or **Copy**. Note that no version history, timestamps, or original author information is preserved in either the Move or Copy action. If you choose to move an item, the original file is deleted. In addition, any metadata associated with the original file will not be preserved and you will need to enter new metadata for the item.

NOTE: You cannot move an item that is checked out by another user. If you attempt to do this, the following error message displays:



If you hover your mouse over the item, a message displays telling you who has the item checked out. That user needs to check the item back in before you can move the item.

Contributor Add-In for Outlook

Adding SharePoint Lists and Libraries to Outlook

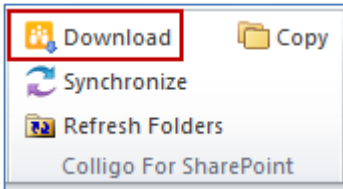
You can add a SharePoint list or library to Contributor Add-in for Outlook in one of two ways:

1. By using the **SharePoint Sites** dialog in Outlook.
2. By using the **Connect to Outlook** button in Internet Explorer.

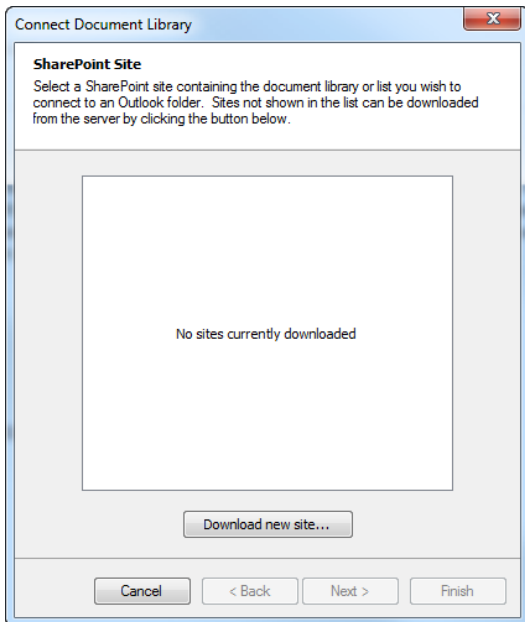
Using the SharePoint Sites dialog in Outlook

To connect a site from within Outlook:

1. Click the **Download** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook.

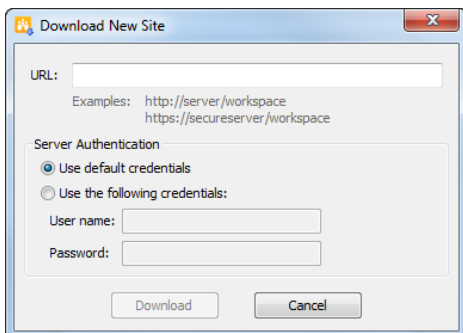


The **Connect Document Library** dialog displays:

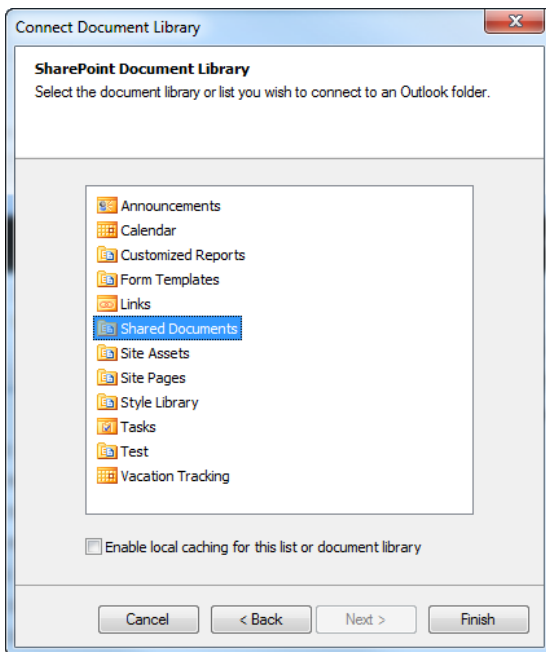


2. Click **Download new site.**

The **Download New Site** dialog displays:



3. Enter the URL of the site and use your default credentials, or user-specific credentials.
4. Click **Download**. The site displays in the Connect Document Library dialog.
5. Click **Next**. A list of all lists and libraries in the site displays:



6. Select the list or library you want to display in Outlook. If you want the list or library to be cached (available offline) check the **Enable local caching for this list or document library** box.
7. Click **Finish**. The list or library displays in the Colligo for SharePoint list in your Outlook folder tree.

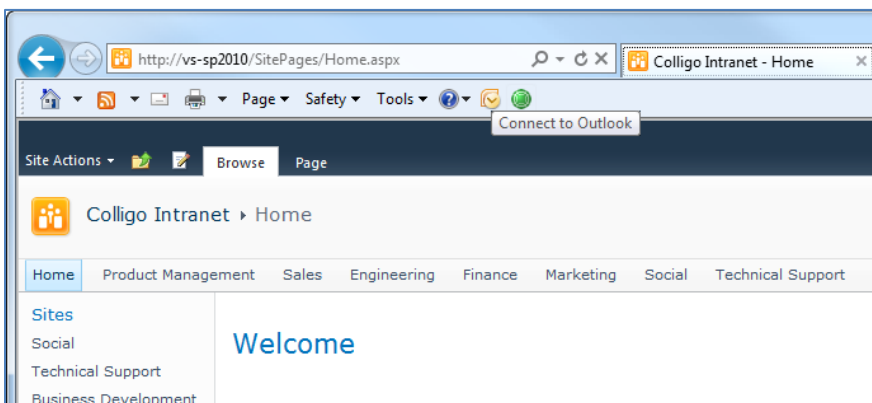
Using the Connect to Outlook Button in Internet Explorer

You can add a SharePoint list or library to Contributor Add-in for Outlook directly from Internet Explorer using the **Connect to Outlook** button.

To add a site with the Connect to Outlook button:

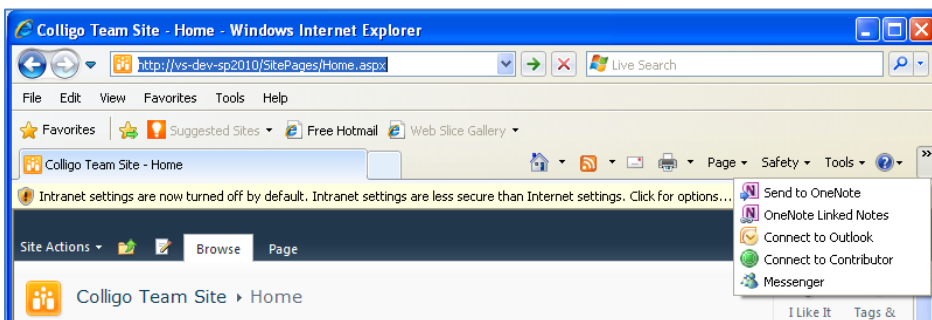
1. Navigate to the SharePoint list or library that you want to add as a folder in Outlook, and click the **Connect to Outlook** button:

Internet Explorer 9

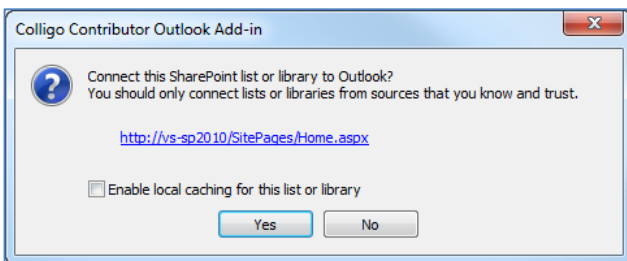


NOTE: If the **Connect to Colligo Outlook** button is not visible, you need to enable the Command bar.

Internet Explorer 8

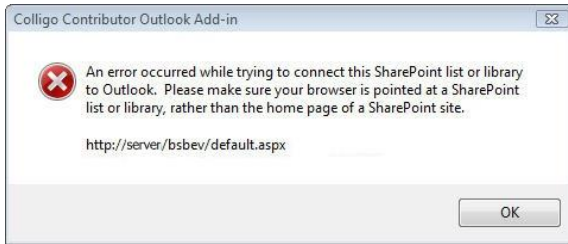


The following dialog displays:



2. Check the **Enable local caching for this list or document library** box if you want the list or library to be cached (available offline).
3. Click **Yes**. The list or library displays in the Colligo for SharePoint list in your Outlook folder tree.

NOTE: If you click the **Connect to Outlook** button when you're on a SharePoint page that is not a list or library, the following message displays:



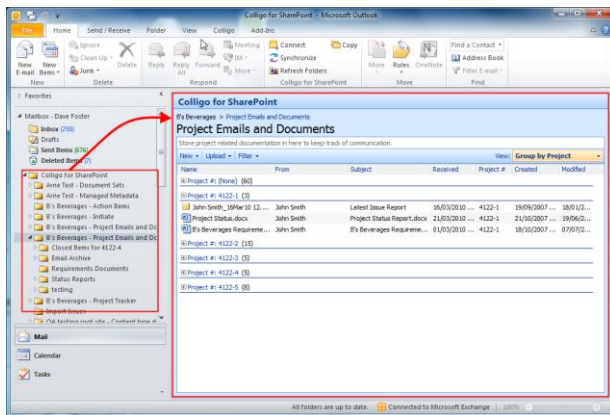
4. Click **OK**, then navigate to a list or library in Internet Explorer and click **Connect to Outlook** again.

Viewing Lists and Libraries in Outlook

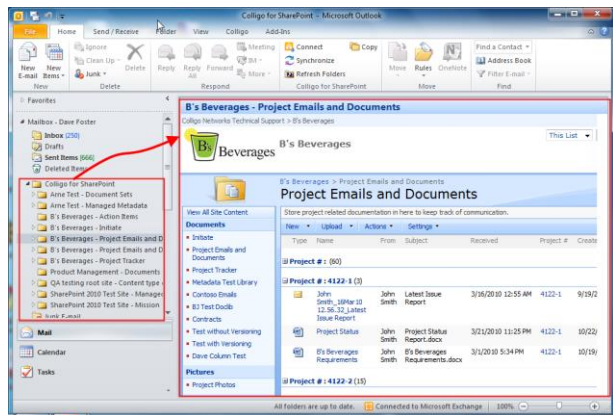
Click on an Outlook folder under the **Colligo for SharePoint** group to display the selected SharePoint location.

The folder location displays in one of two modes: **Cached** or **Online**.

Cached View



Online View



Online mode and cached mode have similar functionality, except that for the online view, the content is not cached (available offline). Both modes allow you to do the following:

- Upload content to SharePoint with metadata Prompt
- View the SharePoint site in Outlook
- Automatically extract Email metadata (To, From, Sent, Subject, etc.)
- Access and Edit existing SharePoint content including accessing metadata.

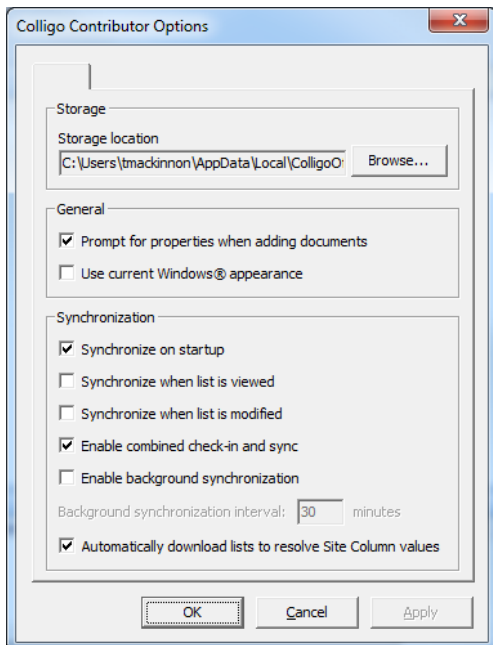
To refresh the content, click the **Refresh Folders** icon in the **Colligo For SharePoint** group in the **Home** tab in Outlook.

Configuring your Synchronization Settings

The settings for how frequently your content is synchronized are set in the Options dialog.

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

The **Colligo Contributor Options** dialog displays:



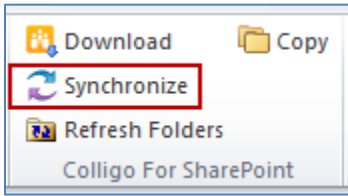
2. In the **General** section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring Default Metadata; see **Setting Default Metadata**.
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 Contributor Client starts
 - b. **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time you view a list or library
 - c. **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time you modify a list or library
 - d. **Enable combined check-in and sync**: choose this option if you want to combine the step of checking in a document and simultaneously syncing it
 - e. **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
 - f. **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 installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

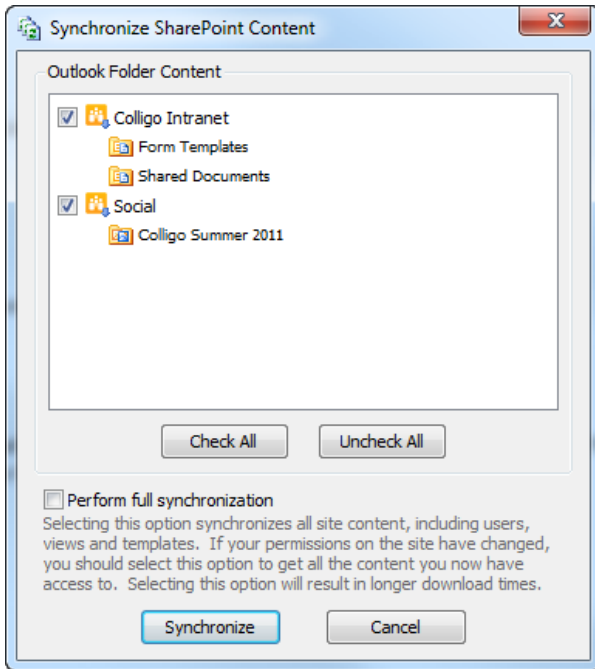
Synchronizing Content Manually

To manually synchronize your SharePoint content:

1. Click the **Synchronize** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook:



The **Synchronize SharePoint Content** dialog displays:



2. Check the boxes of the sites you want to synchronize, or use the **Check All** or **Uncheck All** buttons to set your preferences.
3. Click **Synchronize**.

Completing a Full Synchronization

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

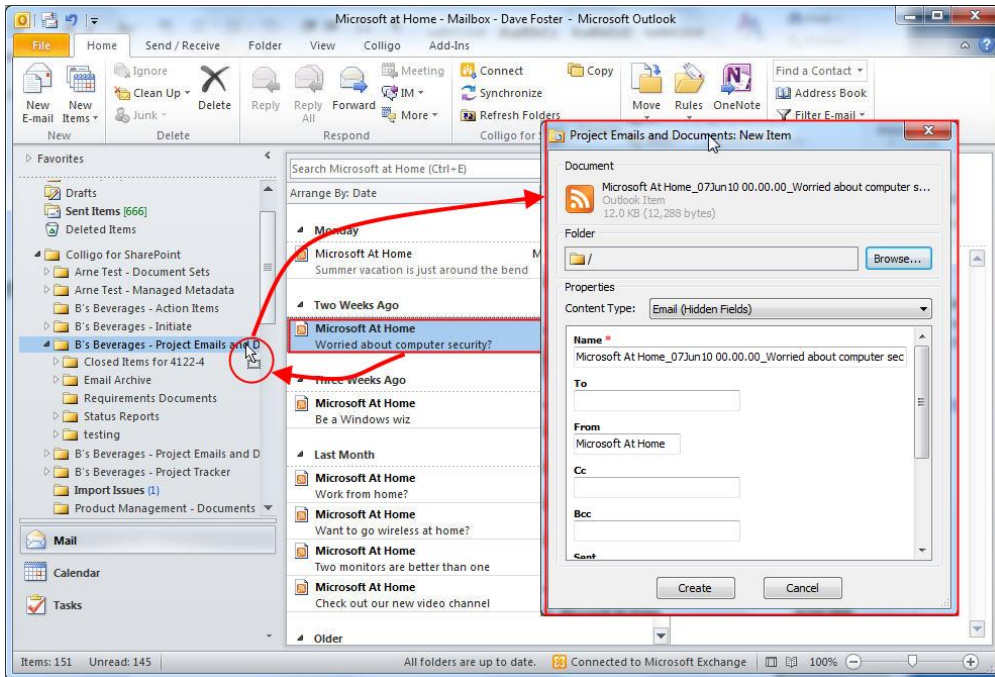
Filing Items to SharePoint Folders

You can file emails and documents to your SharePoint folders in Outlook in a number of different ways.

Dragging-and-Dropping Emails

You can upload one or multiple emails to SharePoint by dragging-and-dropping them from your inbox to a SharePoint location in your Outlook folder tree. You can also drag-and-drop other documents from your desktop or a Windows Explorer folder location.

Each time you file something to a SharePoint folder in Outlook, the metadata editor displays:



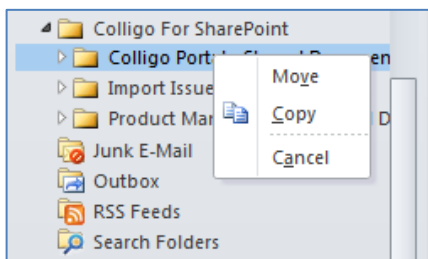
Edit the metadata fields as preferred and click **Create** to complete the upload process.

Move Versus Copy

When you drag-and-drop an item into a folder, it is either moved or copied to SharePoint. If it's moved, the email no longer exists in your Outlook. If it's copied, it exists both in SharePoint and in Outlook.

The default behavior when using the drag-and-drop action is Move. If you want to Copy the item to SharePoint, you can do one of the following:

- left-click and press Ctrl until you let go of the click
- right-click: when you let go of the click, the following dialog displays, giving you the option to **Copy**

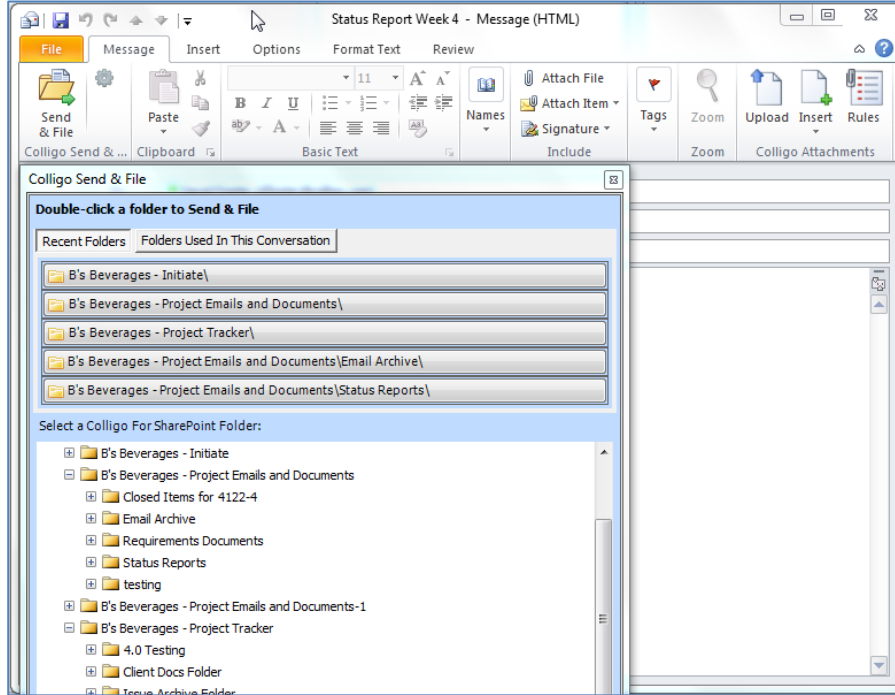


NOTE: attachments are copied to SharePoint and remain as part of the email.

Sending-and-Filing Emails

When you're creating a new email, you can use the **Send & File** button to send your email and file it at the same time.

1. Click the **Send & File** button, the **Colligo Send & File** dialog displays:

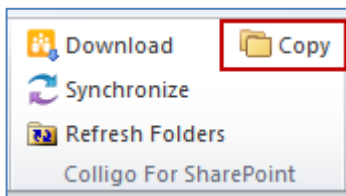


2. Browse to the location you want to file the email to and double-click to select the folder and send the email.

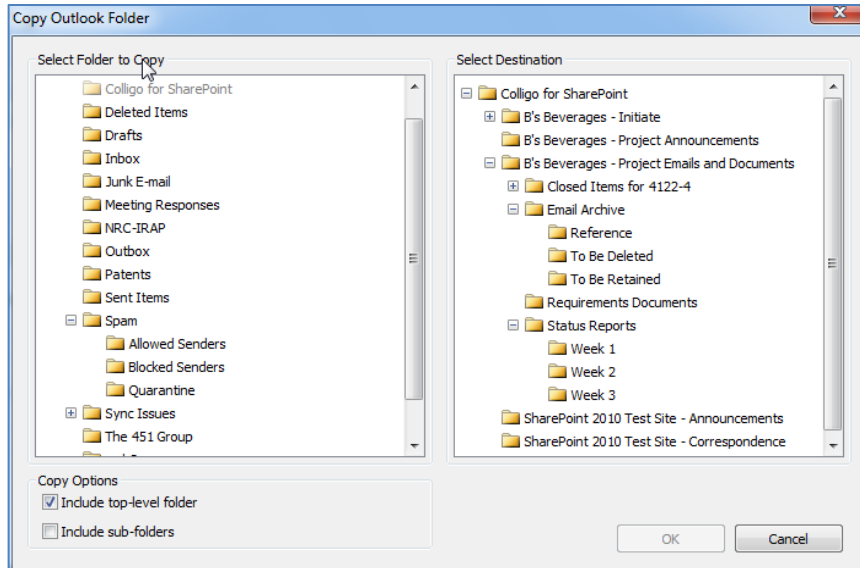
Using the Copy Folder

You can upload whole folders and their contents (including subfolders) from your mailbox to SharePoint.

1. Click the **Copy** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook:



The **Copy Outlook Folder** dialog displays:



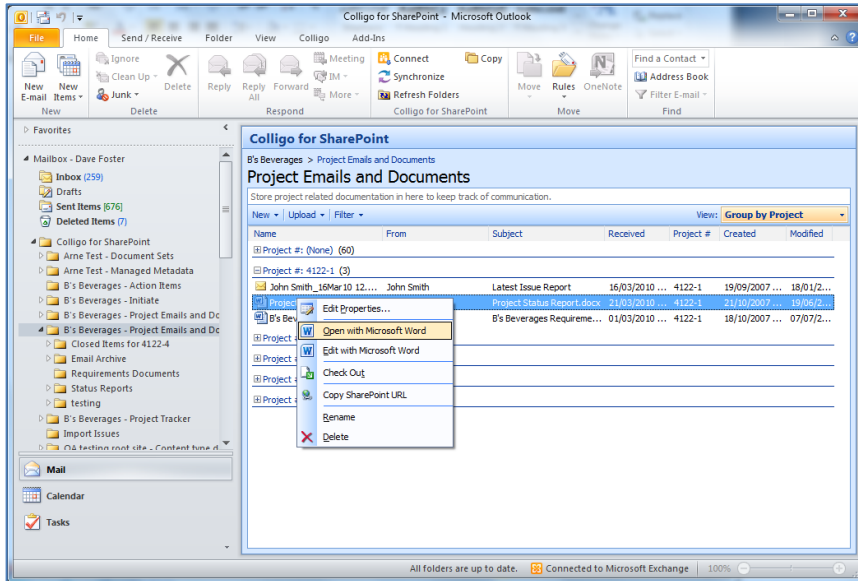
2. In the **Select Folder to Copy** panel, choose the folder that you want to copy to one of your SharePoint locations.
3. In the **Select Destination** panel, choose the SharePoint location to copy the folder to.
4. In the **Copy Options** section, choose if you want to include the top-level folder and/or any subfolders.
5. Click **OK**.

Working with Content in Cached Mode

Many SharePoint actions are available in the cached (offline) mode.

Right-click on an item to:

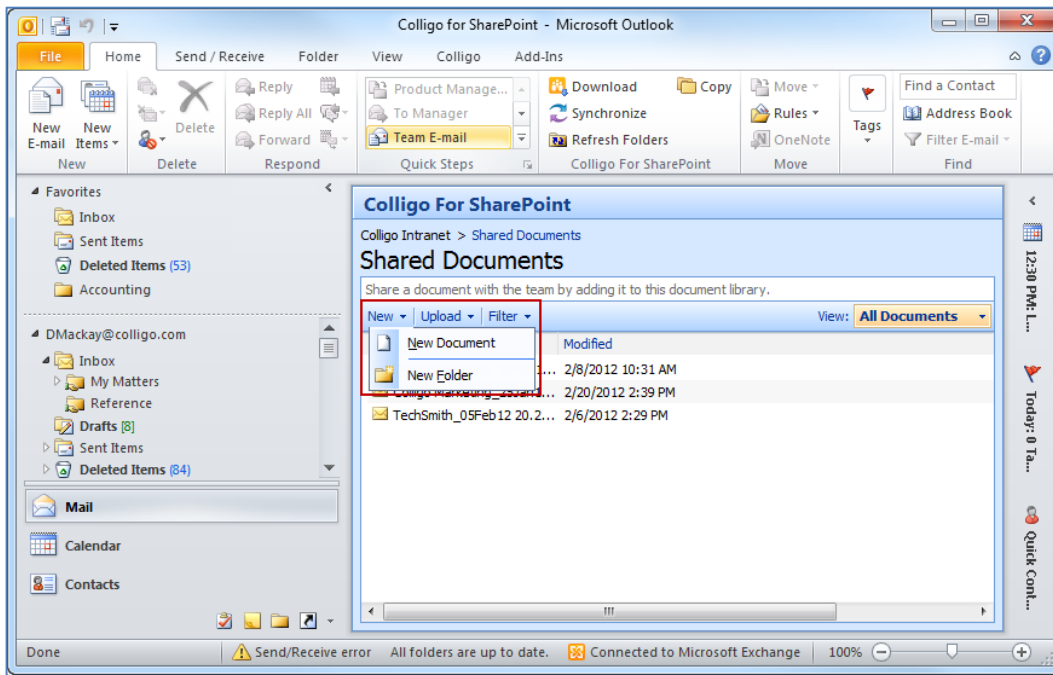
- Edit the properties
- Open/Edit
- Check Out, Check In, or Discard Check Out
- Rename content
- Delete content



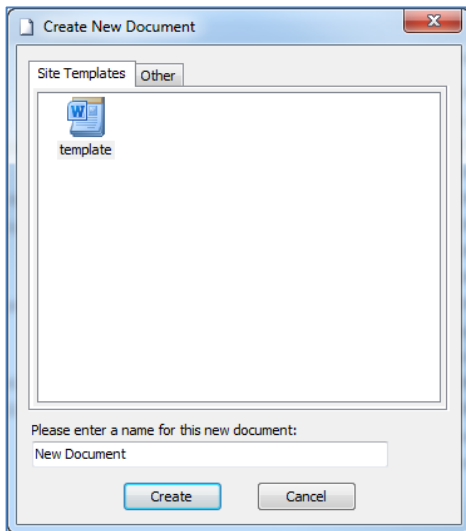
Creating New Content

To create new content in a cached folder:

1. Click the **New** drop-down menu:



2. Select the **New Document** option to display the **Create New Document** dialog:

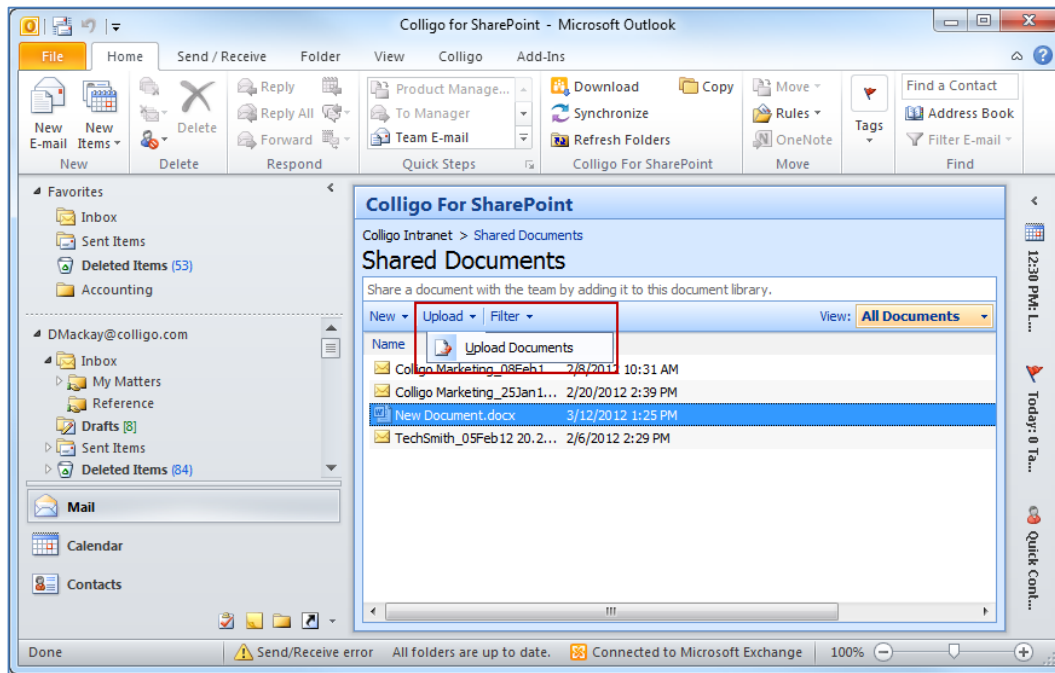


3. Choose your document type from the **Site Templates** tab or the **Other** tab.
4. Enter a name for the document, and click **Create**.
5. The **Edit Properties** dialog displays. Edit as preferred.
The new document is added to the list or library.

Uploading Existing Content

To upload existing content to a cached folder:

1. Click the **Upload** drop-down menu and select **Upload Documents**:



The **Upload Documents** dialog displays.

2. Browse to the location of the document you wish to upload and click **Open**.
3. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.
The new document is added to the list or library.

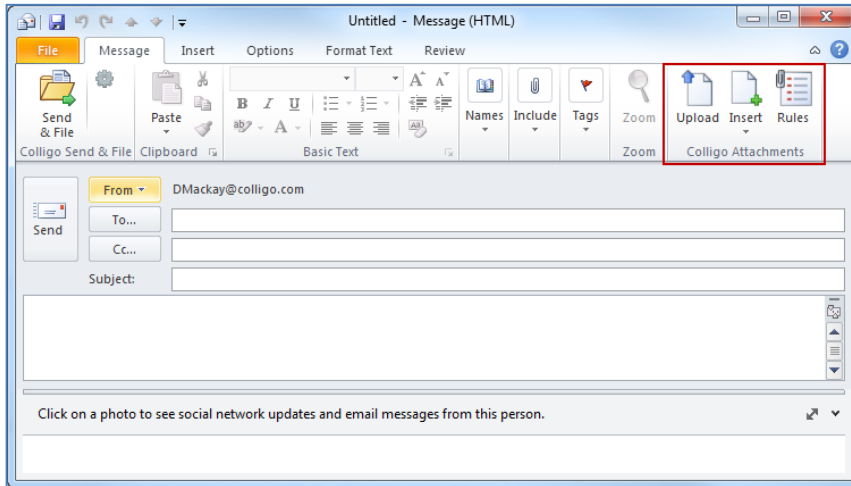
Using the Colligo Attachment Manager

Colligo Contributor Add-in for Outlook has an Attachment Manager tool that gives you a number of ways to share and manage your SharePoint content.

Uploading an attachment to SharePoint

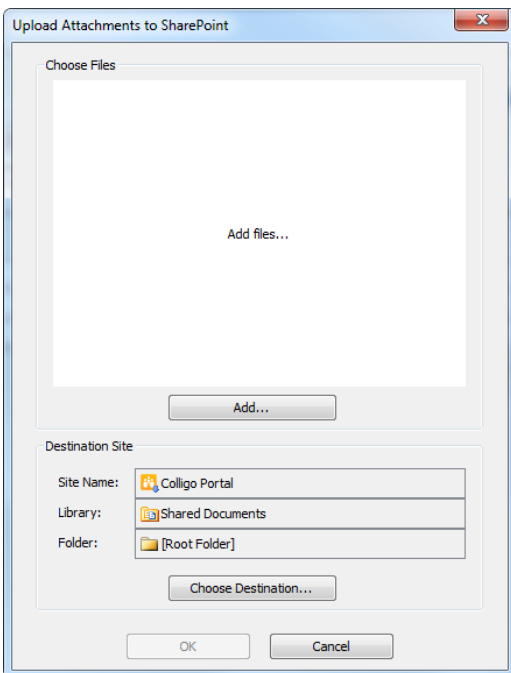
If you want to send someone a document, but you would rather send a link to a SharePoint location instead of an attachment, you can upload the document to SharePoint and insert a link to the location into your email. You can do this from Outlook using Colligo's Attachment Manager.

When you launch a new email, the **Colligo Attachments** group displays in the **Message** ribbon:



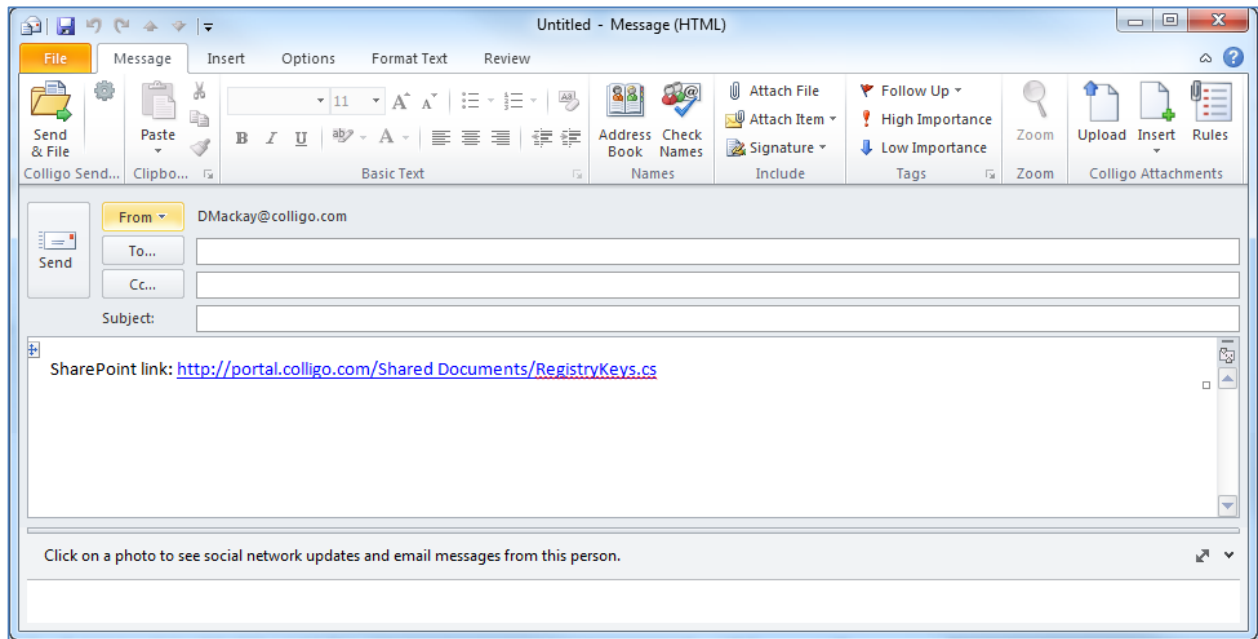
NOTE: The **Colligo Attachments** group only displays in the **Message** ribbon of a new email; it does not display anywhere else in Outlook.

1. Click **Upload** to display the **Upload Attachments to SharePoint** dialog:



2. In the **Choose Files** section, click **Add** and browse to the location of the document(s) you want to upload.
3. In the **Destination Site** section, click **Choose Destination** and select the **Site**, **Library**, and **Folder** you want to upload your documents to.
4. Click **OK**. The **New Item** dialog displays.
5. Enter any properties and click **Create**.

The document is uploaded to your specified location, and a link to the document's location is inserted into the body of your email:



Inserting a Link to a Document in SharePoint

If the document you want to share is in SharePoint, you can insert a link to the document in your email.

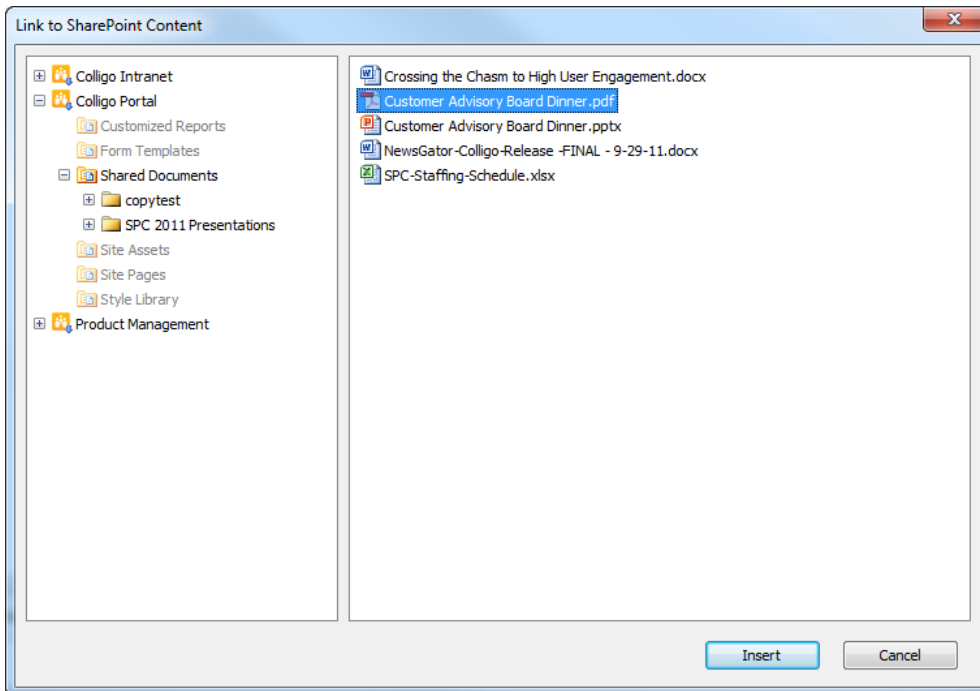
To insert a link to an item in SharePoint:

1. Click **Insert** in the Colligo Attachments group in the **Message** ribbon and choose either **Attachment Link** or **Text Link**.

NOTE: The **Attachment** link displays the full path of the SharePoint location, while the **Text** link displays only the name of the file.

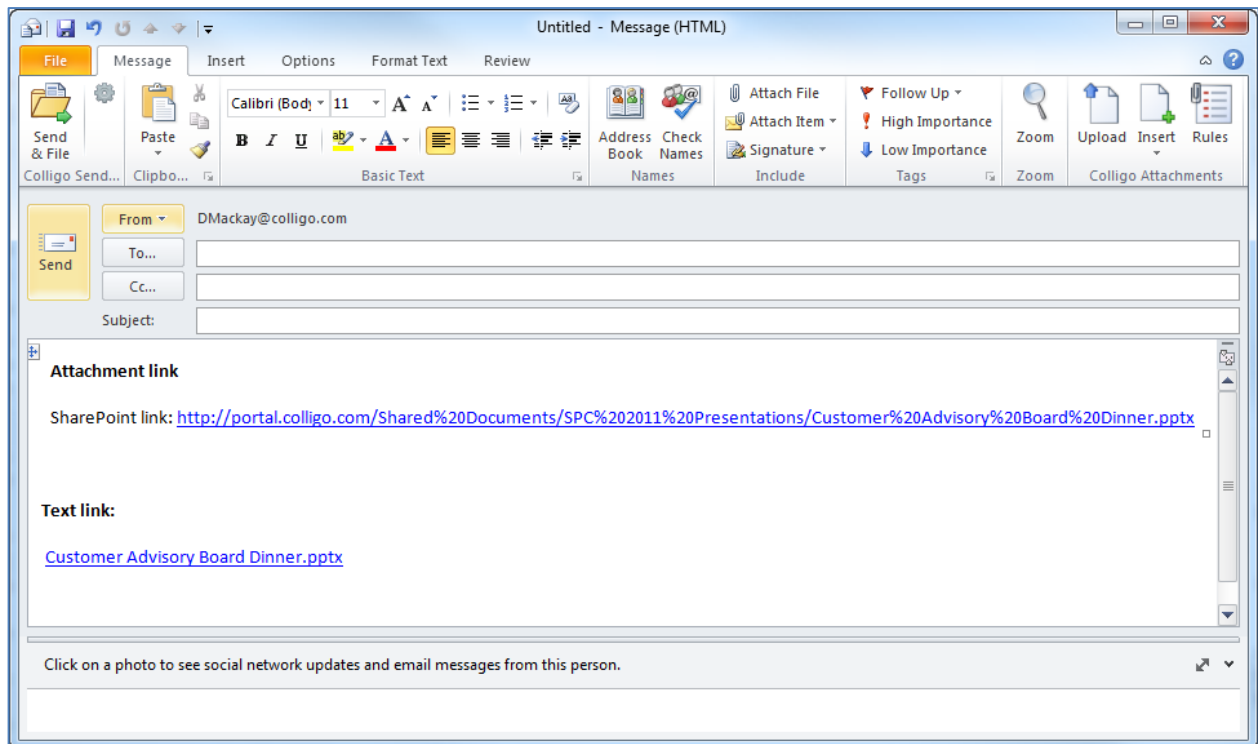
The **Link to SharePoint Content** dialog displays:

Colligo Contributor Pro - Contributor Add-In for Outlook



2. Browse through the SharePoint libraries to find the document you want to link to, and click **Insert**.

The links display as follows:

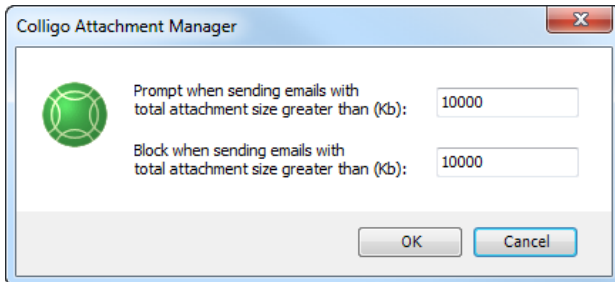


Setting Attachment Rules

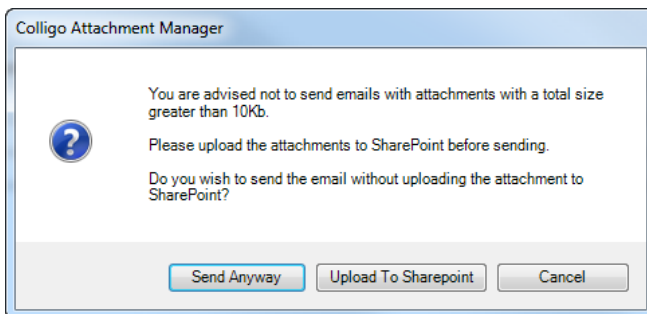
You can configure rules for the size of your attachments that correspond to your organization’s email policies to display a prompt when you have an attachment exceeding a certain size, or to block sending an email when an attachment exceeds a specified size.

To configure the rules:

1. Click **Rules** in the **Colligo Attachments** group to display the **Colligo Attachment Manager** dialog:

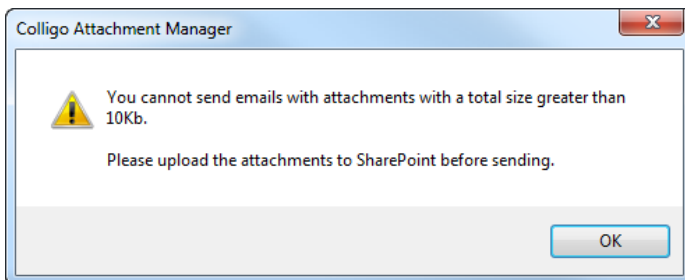


2. In the field **Prompt when sending emails with total attachment size great than (Kb)**, enter the limit for the size of the attachment. If you attempt to send an email that has an attachment greater than the number you have specified in this field, the following dialog displays:



Choose from one of the following options:

- a) **Send Anyway**: choose this option to ignore the warning and send the email as configured
 - b) **Upload to SharePoint**: choose this option to display the **Upload Attachments to SharePoint** dialog and choose the location in SharePoint you want to upload the attachment to
3. In the field **Block when sending emails with total attachment size great than (Kb)**, enter the limit for the size of the attachment. If you attempt to send an email that has an attachment greater than the number you have specified in this field, the following dialog displays:



4. Click **OK** and the **Upload Attachments to SharePoint** dialog displays.
5. Choose the upload destination and click **OK**. The item is uploaded and a link to the SharePoint location is inserted into your email.

Contributor File Manager

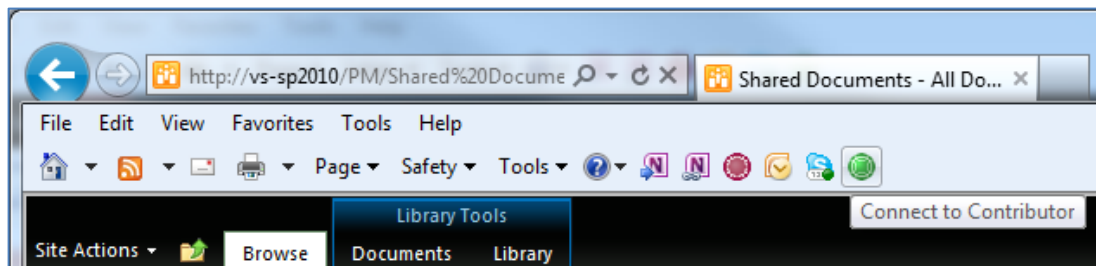
Connecting SharePoint Sites

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

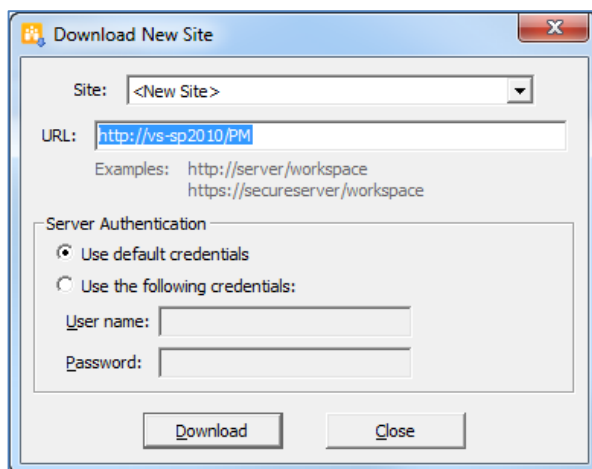
- Using the **Connect to Contributor** option in Internet Explorer
- Using the **Download New Site** option

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.

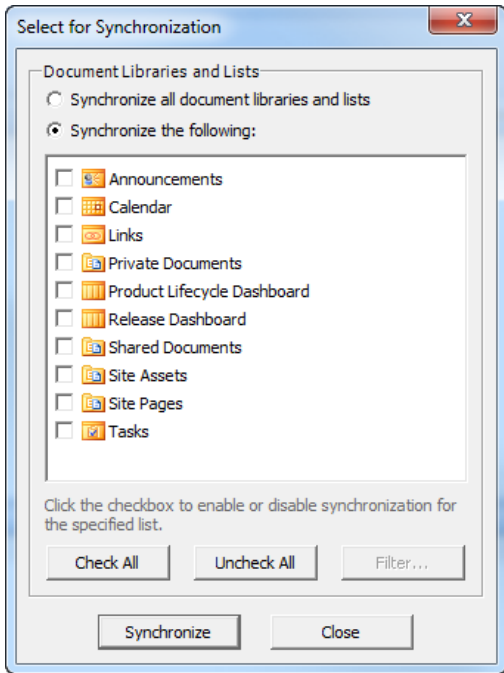


3. The **Download New Site** dialog displays. Select either your default Windows credentials, or supply other user-specific credentials.



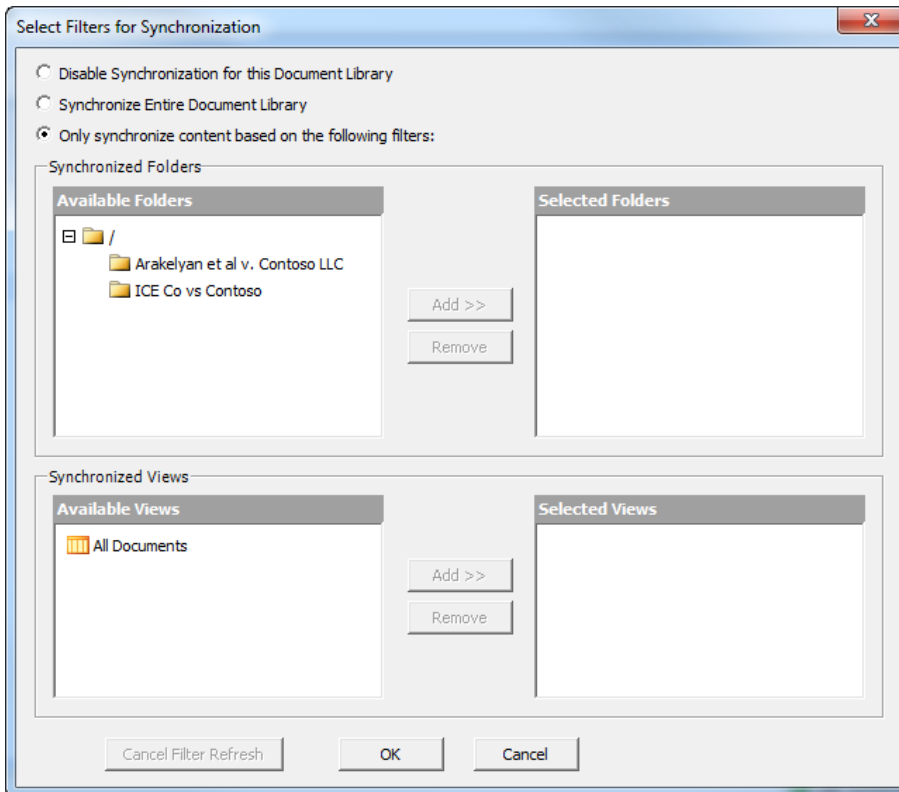
4. Click **Download**.

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:

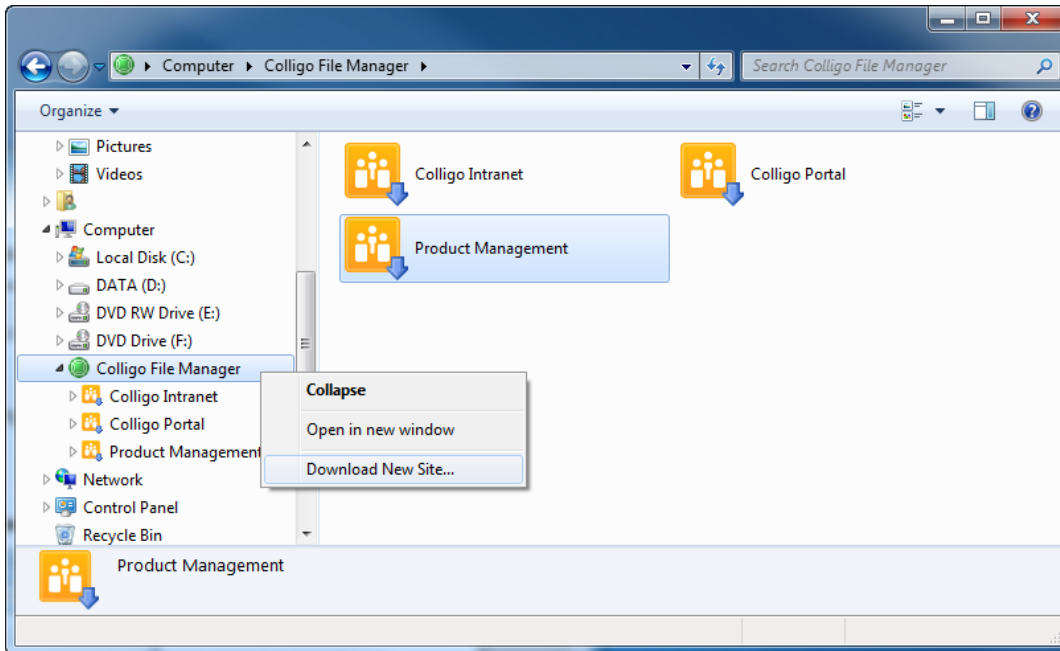


7. Choose from the following options:
 - **Disable Synchronization for this Document Library:** choose this option if you do not want the document library to be available offline.
 - **Synchronize Entire Document Library:** choose this option if want to synchronize everything in the specified document 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.

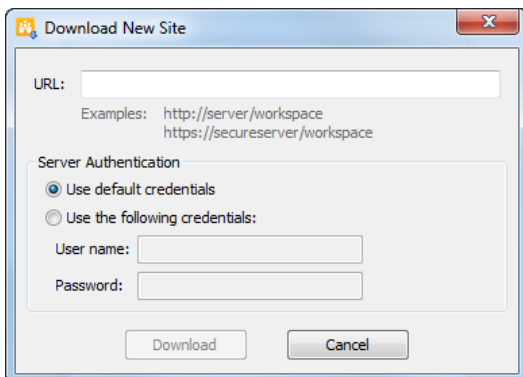
Using the Download New Site Dialog

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:

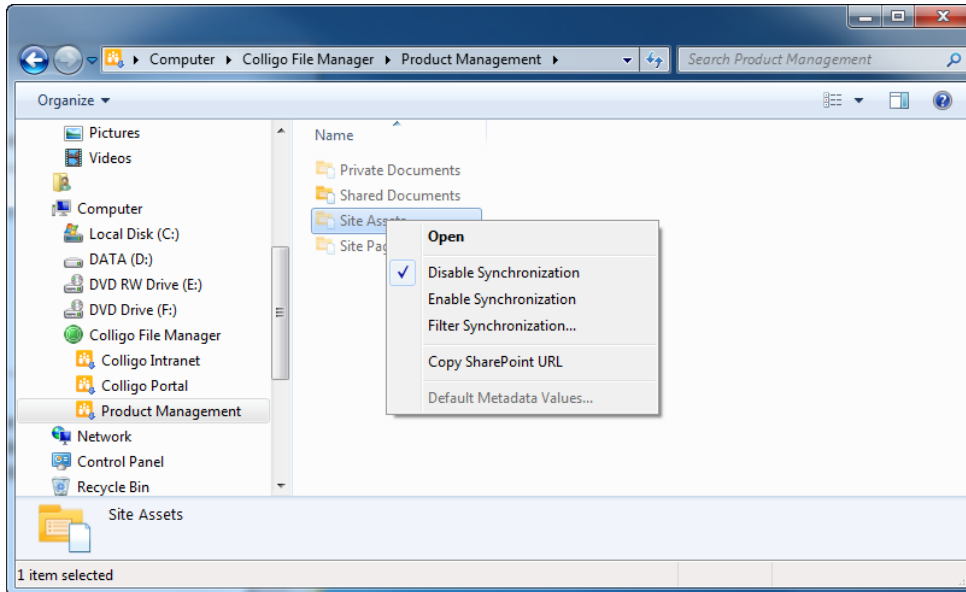


2. Enter the URL of the site and use your default credentials, or user-specific credentials.

3. Click **Download**.

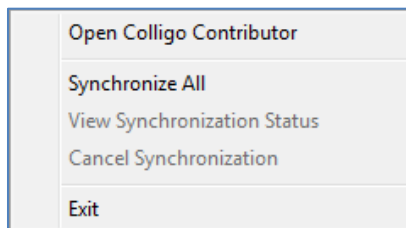
The site displays under the **Colligo File Manager** node in Windows Explorer. However, the site's lists and libraries are not synchronized at this point and display as greyed out in Windows Explorer.

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**.



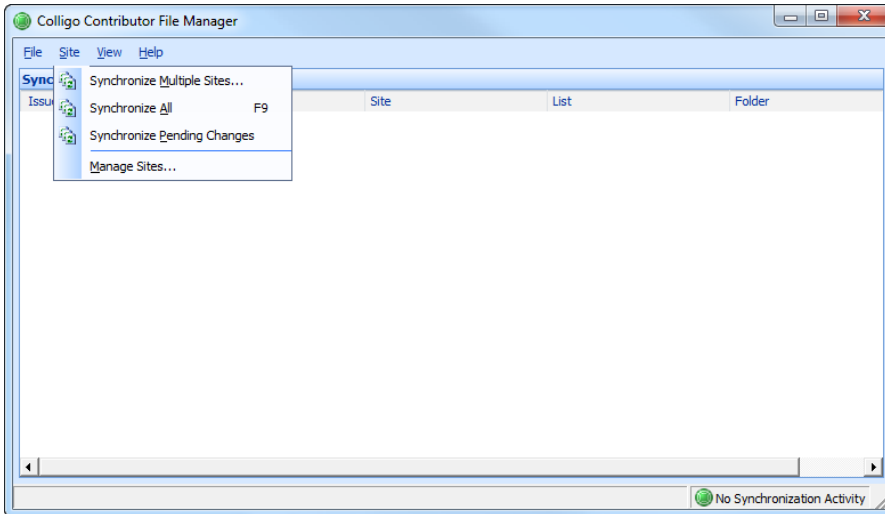
After you have enabled synchronization and set your filters, you need to start the synchronization process. You can do this in one of two ways:

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

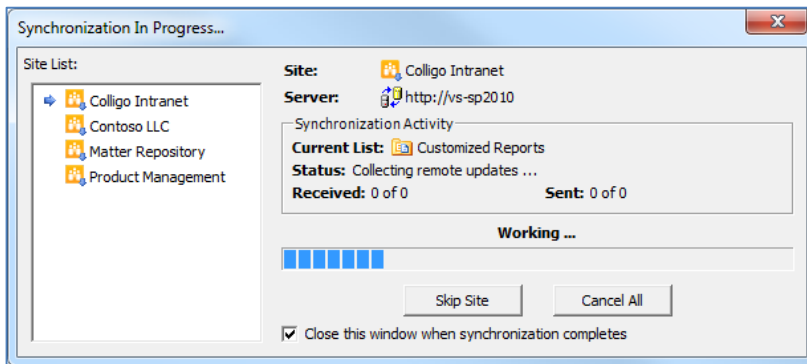


- From the **Site** menu in the Contributor File Manager Control Panel, choose one of the following options:
 - **Synchronize Multiple Sites**: choose this option to synchronize more than one site. In the **Synchronize Multiple Sites** dialog, check your preferred sites and click **Synchronize**.
 -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

Colligo Contributor Pro - Contributor File Manager



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

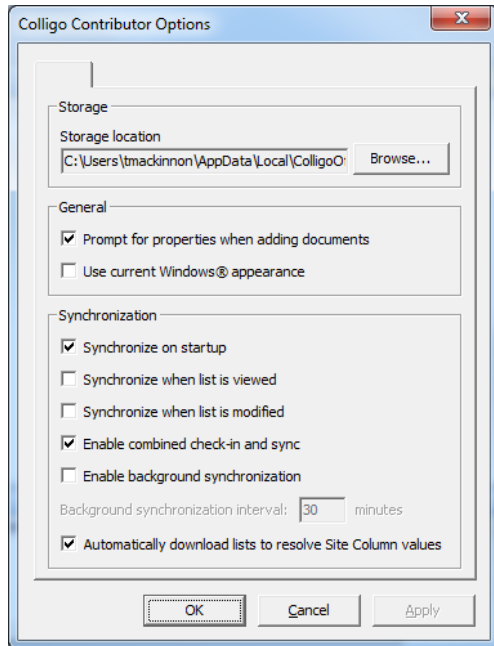


Configuring Synchronization Settings

The synchronization settings for Contributor File Manager are set in the Options dialog:

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 Contributor Client starts
 - b. **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time you view a list or library
 - c. **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time you modify a list or library
 - d. **Enable combined check-in and sync**: choose this option if you want to combine the step of checking in a document and simultaneously syncing it
 - e. **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
 - f. **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 installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

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.

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.

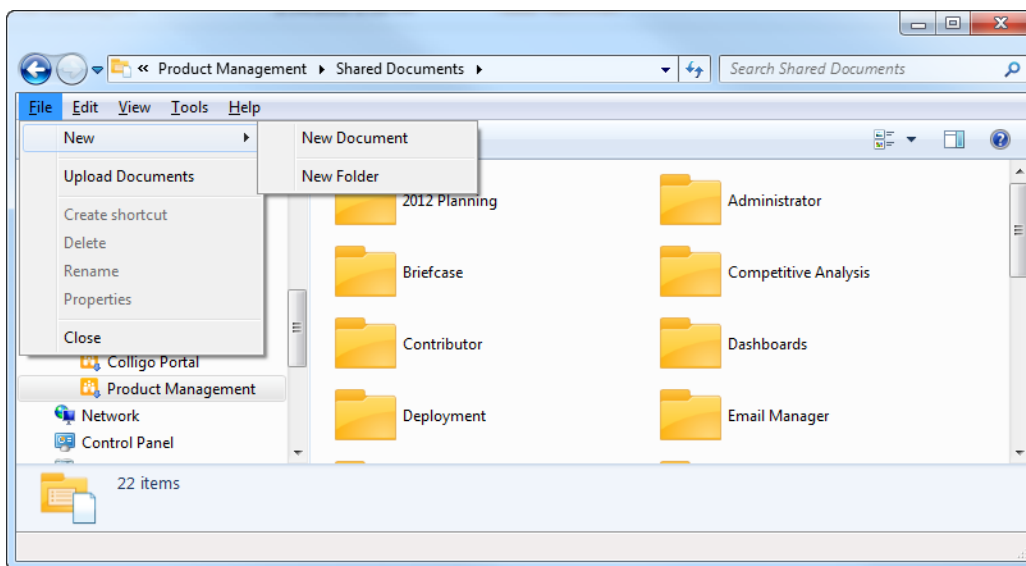
You can add items to Contributor File Manager in one of the following ways:

- 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

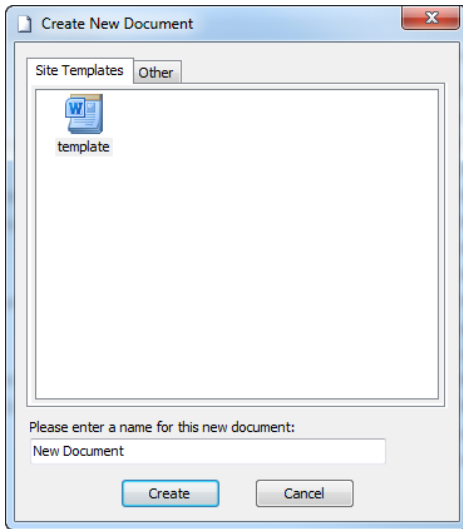
From within Windows Explorer, you can create and add a new document to a SharePoint location:

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



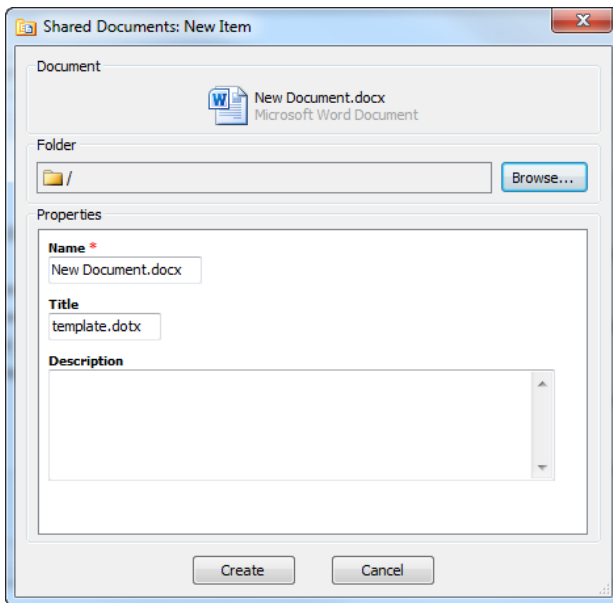
NOTE: if you cannot see the **File** menu, press the **Alt** key to display it.

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.

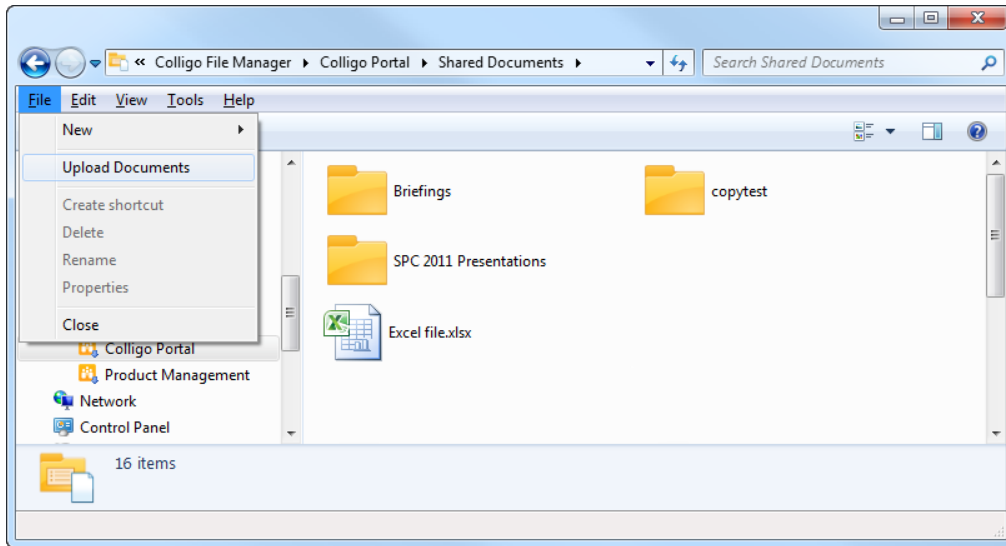


4. This dialog is where you can record information about the document. Edit as preferred.
5. Click **Close**. The document is added to the SharePoint location.

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:

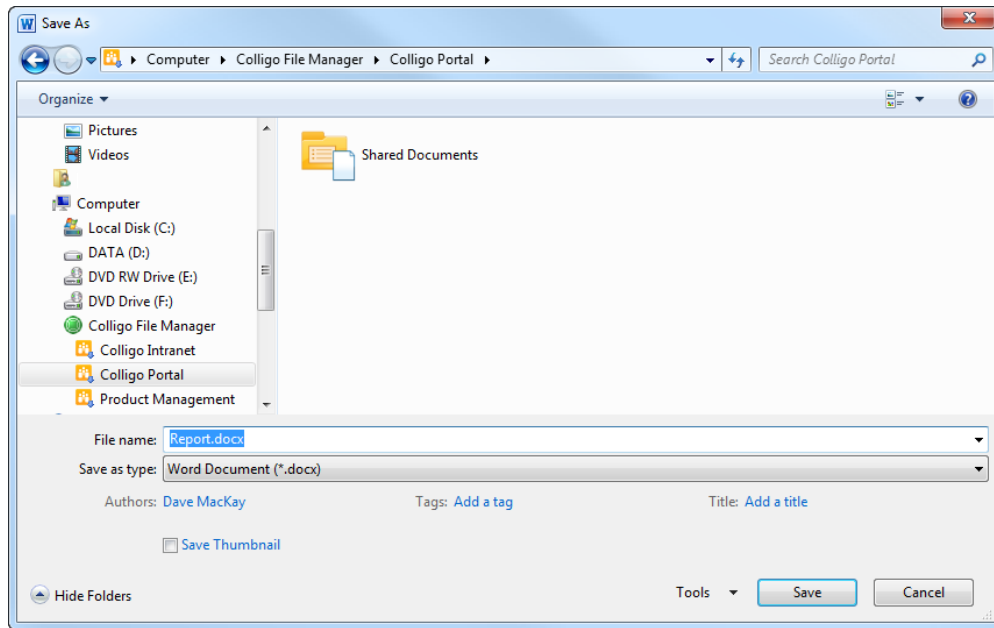
1. Drag-and-drop your preferred files or folders from your desktop or another directory to your preferred SharePoint location in Contributor File Manager.
2. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.
The file or folder is added to the SharePoint location. If you 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.

Copying a SharePoint URL

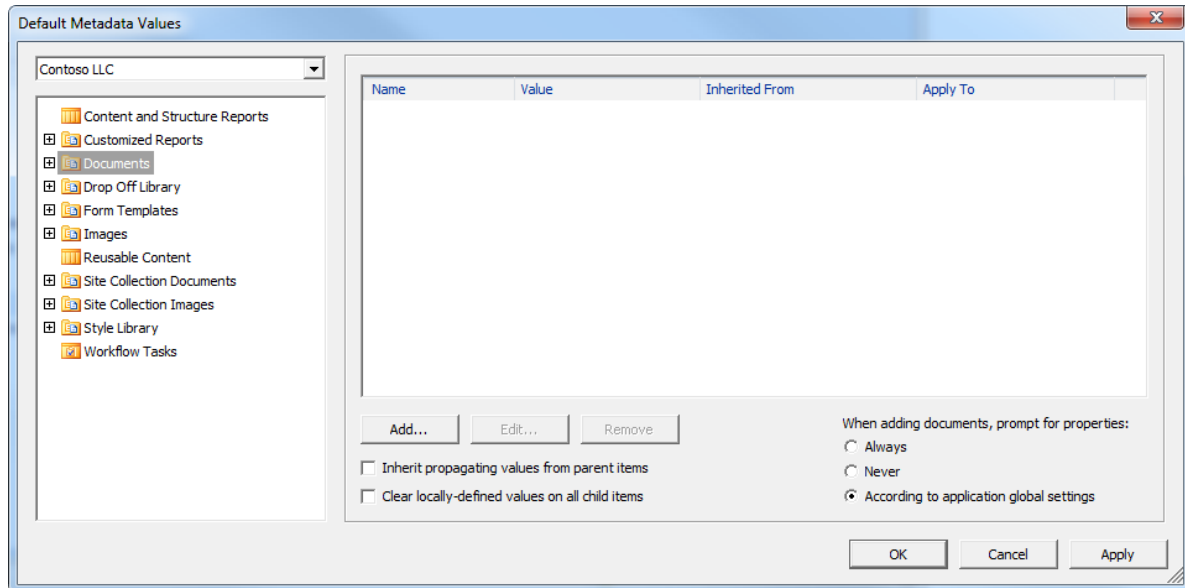
You can share content with other users by right-clicking on an item and selecting **Copy SharePoint URL**. The URLs for the selected items are copied to your clipboard and can be pasted into applications, files, or emails.

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 Client interface:

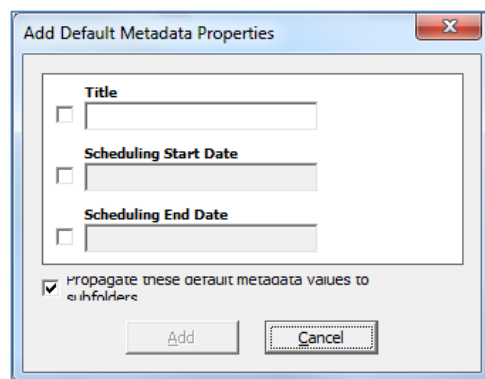
1. From the **File** menu, choose **Default Metadata Values**.

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 of **Configuring Synchronization Settings**)