

Colligo Contributor SDK

Metadata Editor Application Note



CONTRIBUTOR METADATA EDITOR APPLICATION NOTE

Increasingly Enterprises are creating complex content description tags and metadata within their Microsoft SharePoint deployments. The value of this content management relies both on the accurate capture of the metadata at the time of creation by the user as well as managing its evolution throughout the document lifecycle.

Colligo Contributor products support this process with the following functions:

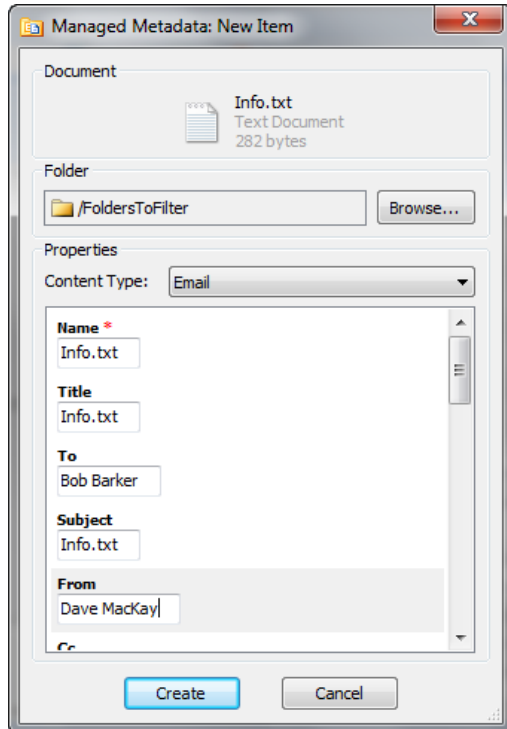
- Importation and enforcement of meta data configuration from SharePoint site
- Synchronization of meta data between local and server copies
- Metadata insertion and editing for new documents and list items
- Metadata review and updating of existing documents and list items
- Metadata comparison and updating after detection of a conflict

The content tagging and metadata capture process inherently involves the client user and Contributor presents three specific dialogues to the user to engage them in the process. Colligo, however, also recognizes that the complexity of possibilities, rich variety and extensive range of potential workflows that enterprises could require cannot be adequately captured in a single, generic metadata editor.

To further enable enterprises to support their content management requirements Colligo has developed an interface within the Contributor Release 3 products to enable custom metadata editors to be developed.

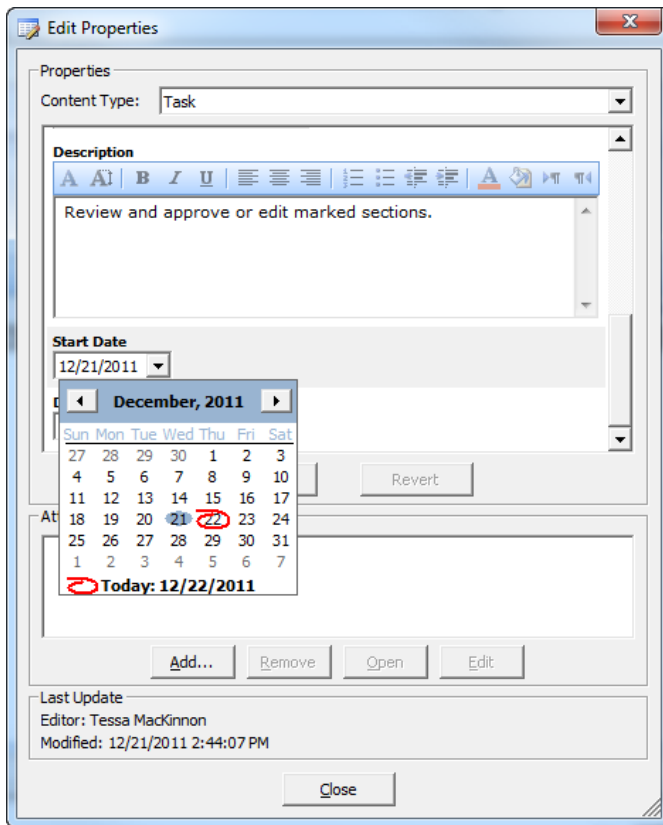
Three specific and independent metadata capture and edit points are supported:

1. New document and list item creation



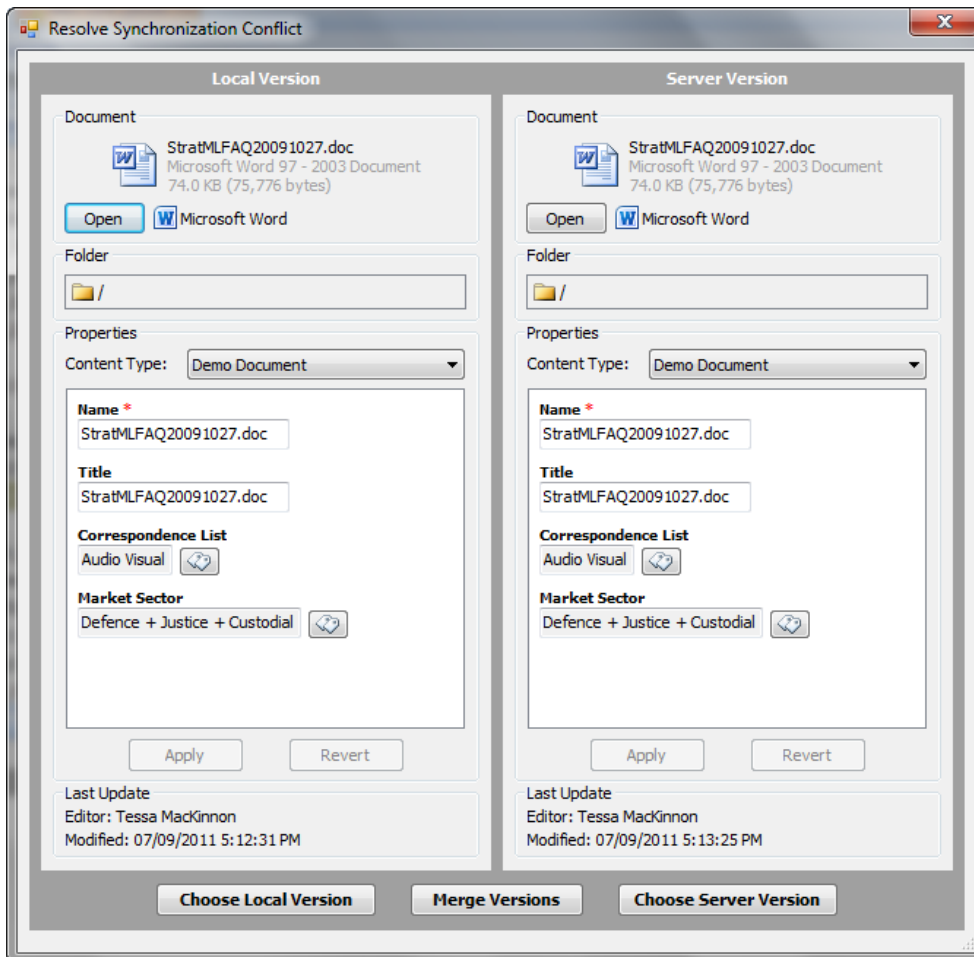
When a new document or list item is entered the metadata fields are presented for completion.

2. Document and list item properties view and edit



When the **Edit Properties** function is invoked for an existing document or list item, the current content of the metadata fields are presented for viewing and modification.

3. Document and list item conflict Resolution



If during a synchronization there is a conflict detected between the local copy and the server copy the conflict resolution dialogue includes the comparison and potential changing of the metadata.

CUSTOM METADATA EDITOR DEVELOPMENT

For more complex or sophisticated editing of metadata within documents or list items the Contributor Metadata Editor Application Programming Interface enables the use of a custom developed editor. The custom Metadata editor is provided as a custom DLL which implements the Metadata Editor API. This Microsoft .Net API and Microsoft Visual Studio 2005 provide a familiar environment for developers.

Development of Metadata Editors for Colligo Contributor Pro requires the following:

Development IDE	Visual Studio 2008 and higher
Operating Systems	<ul style="list-style-type: none"> • Windows XP • Window Vista • Windows 7
Installed Components	.Net Framework V3.5 Runtime
Contributor	<ul style="list-style-type: none"> • Contributor Pro, Client or Add-In V3.0 or higher • Contributor Run-Time V3.0 or higher

The Contributor Metadata Editor Application Programming Interface defines three entry points reflecting each of the edit points in the standard document or list item workflow. At each point the Contributor product passes the metadata to the custom Metadata editor and it determines the best method of engaging the user in a dialogue to perform the edit function. Using this interface a range of options and methods can be used to determine the data to be entered including:

1. Use the standard Contributor Metadata Editor
2. Provide a custom editor dialogue for all document and list items
3. Provide a custom editor for some document or list types and use Contributor for the remainder

The functions of the custom metadata editor are not restricted by Contributor and enable editors to perform the following types of functions:

- Custom look and feel of presentation, text, font, highlight and color
- Specific presentation matching metadata item content (e.g. lists, tick boxes, groups)
- Context sensitive edit based on content type or any metadata field
- Auto-population and data lookup from applications external to SharePoint e.g. CRM.
- Validation and filtration of linked data items (e.g. Country, State, Town)
- Launch custom help from other applications such as Web pages
- Data entry verification (e.g. name look from directory, spell check)

The custom metadata editor feature is offered in each of the Colligo Contributor products. For further details and information on how the Contributor Metadata Editor Application Programming Interface can assist in your content management strategy, please contact your account representative or our sales team at sales@colligo.com.