

# Colligo Contributor 4.3 for Terminal Services

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User Guide



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## INTRODUCTION

This User Guide is designed to serve as a brief overview to help you get started. There is also information available under the Help option in the various Contributor interface toolbars. If necessary you can access the Help by launching the Contributor interface from the System Tray and selecting **Help > Help and Support**.

You can find a number of [screencasts](#) on the support site that walk you through the main product features. The SharePoint support site can be synchronized with Colligo Contributor for access at any time, online or offline. Please follow the instructions on the home page at <http://www.colligo.com/support/>.

Please send questions and feedback to [support@colligo.com](mailto:support@colligo.com).

## COMPATIBILITY AND PRE-REQUISITES FOR COLLIGO CONTRIBUTOR

### Systems Supported

- Microsoft® Windows® 7 Home Premium; Professional or Ultimate
- Microsoft® Windows® Vista Business; Enterprise or Ultimate
- Microsoft® Windows® XP Home or Professional
- Microsoft Office 2003 – 2010 (Office 2003 SP2 or later for InfoPath forms)
- Internet Explorer 6.0 or later
- SharePoint Server 2010, MOSS 2007 and SPS 2003; SharePoint Foundation and WSS (2.0 or 3.0); SharePoint 2010 Online (Office365) and BPOS
- Consumes roughly 20MB of disk space, not including content
- If you are running a previous version, the new version can be installed over top of the old version without an uninstall. This also preserves all of the cached content.

### Application Prerequisites

- Microsoft® .NET framework 3.5 Runtime

### Outlook Add-in Prerequisites

- Compatible version of Outlook (Outlook 2010, 2007 or 2003)
- Office 2003 or Office 2007 Primary Interop Assemblies (depending on which version of Office is installed)
- Microsoft Visual Studio 2005 Tools for Office Second Edition (VSTO 2005 SE) Runtime
- Microsoft Visual C++ 2008 SP1 Redistributable Package

### 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.

### Compatible Products

Contributor Viewer, Client, Outlook Add-in, and Uploader are all suitable for use in a terminal server based environment. At this time the File Manager is not compatible with terminal server based environments.

## INSTALLATION CONSIDERATIONS

There are a number of specific issues that must be considered when installing Contributor in a terminal server environment. Each of these requires specific installation and configuration affects the product operation.

### Activation and Licensing

Contributor is normally licensed on a per user / per machine basis and the activation system is used to enable and authorize client installation. Each Contributor client performs an activation request to the Colligo Activation servers to gain the necessary authorization for execution. The results of this activation are recorded in a special file that is stored in the installation area of Contributor.

In a terminal server environment, where the users profile and storage may be located on network storage or may be created on demand, this activation file may not be maintained between sessions leading to unnecessary and repeated activation requests.

There is special licensing and license keys available for use with a terminal server environment which eliminates this activation request traffic. For further information contact [Colligo Sales](#).

### Cache Location

Contributor uses a local database and cache to hold SharePoint configuration and content. Normally this is stored in the local PC file system but in a terminal server environment this must be moved to a network accessible location.

When installing using a customized MSI, the field to specify the cache location is STORAGE\_ROOT.

The registry setting to specify the cache location is General\Storage\_Root.

The cache should be on a commonly accessible network location that is available to all of the servers where a user could log in and receive a terminal session.

### Outlook Folder Storage

Contributor's default behavior is to create a set of Outlook storage folders based on the local machine name. This allows the user to have multiple machines and multiple instances of Colligo that are using different caches and configurations. Because Microsoft Exchange and Outlook reflect the Exchange folders to each Outlook client, the various Colligo for SharePoint folders are displayed in the users' Mailbox and Colligo distinguishes between them by appending the machine name where the cache and configuration resides locally.

In a terminal server environment where multiple machines (servers) are used but the user has only one networked cache location and configuration, this behavior should be suppressed and a single Colligo for SharePoint root folder displayed and used by all instances of Colligo.

When installing using a customized MSI the field to suppress the machine name is DISABLE\_OUTLOOK\_MACHINE\_ID

The registry setting to suppress the machine name is Outlook\DisableMachineld. The value should be set to 1 (Enabled).

## Multi-Session Behaviors

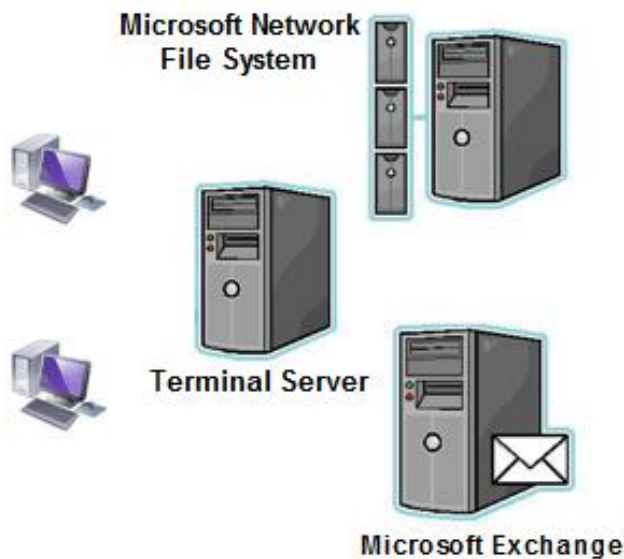
Contributor uses a database and a cache to store the SharePoint configuration and content. Having multiple sessions simultaneously access this shared resource can lead to conflicts, unexpected database results, and general user confusion. To help control this, Contributor has a mechanism to suppress operations at all sessions except at the session where the user is currently located.

When installing using a customized MSI the field to support single session operation is USE\_SYNC\_LOCK, The registry setting field to support a single-session operation is General\UseSyncLock. The value should be set to 1 (Enabled).

## USER SESSION OPERATION

When Contributor is used within a Terminal Server environment, there are three major systems that have to be recognized.

1. **Terminal Server:** one or more servers that are providing the PC client session to end users. The end users could be using virtual, thin, or thick client technology.
2. **Network File System:** a server that is providing the common storage for the user's session. All data, configuration, and content are stored on this network accessible storage.
3. **Microsoft Exchange:** the email system that is providing email services and, importantly, synchronizing the user's Microsoft Outlook folders and display between the various sessions. This reflection of the Exchange status can provide a source of conflict in the user experience.



### Support Session Types

Contributor supports both single-user, single-session and single-user, multi-session types of operation.

#### Single-User Single-Session

In this mode of operation the terminal server restricts the user to a single active session. The session is either moved to provide service at the user's new access client or the user is disabled from starting further sessions while one session is active.

In this case, while the user is using Contributor in Terminal server mode, the effect is the same as if they were always logging onto a single machine at a single location. The only noticeable effect of the terminal server is that access is to a network storage location, and this may become noticeable if there are network conditions that prevent or restrict access to the cache and configuration on the Network File Server.

#### Single-User Multi-Session

In this mode of operation, a single user may have multiple sessions concurrently executing on the terminal server accessed for different clients. Contributor supports this scenario but restricts the user to being active at only one session at a time; i.e. no simultaneous operations.

Contributor uses a *follow me* process to always enable service at the latest new session. When a new session starts up, Contributor diverts synchronization to the local client and the other Contributor client, running in another session, suspends operations. Logging out of the session causes Contributor to revert to the previous session if it is still running.

In the case of the user returning to a client session after using another session, i.e. where there are two active sessions each with a Contributor running only a single session can be the active one. There are user interface controls and status to assist users in selecting their current client to be the active Contributor client and receive synchronizations services.

In all cases it is only the user interface and user dialogs that are affected. All Contributor sessions are updating the same Contributor cache and configuration database and so users have full access to content and information regardless of which session they use. There is the possibility, however, to have files locked by the various applications available in each session. E.g. if a file is opened in Microsoft Word and then the user moves to a different session but leaves the application open, this can cause the file to be locked and is not accessible from any other session. This is inherent in terminal server environments and is not specific to Contributor.

## DESKTOP CLIENT

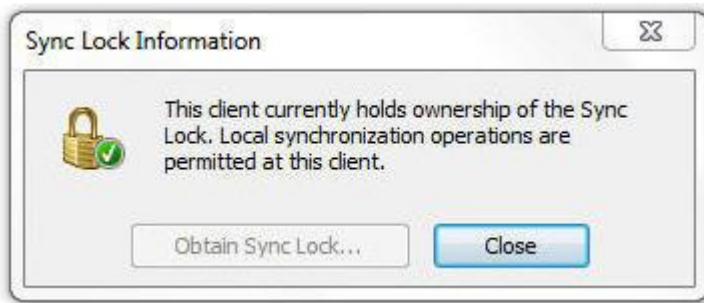
### Active Session Status

The Client indicates it is the active Contributor client by displaying the following icon in the main toolbar:

#### Active Contributor



Clicking the icon displays confirmation of the Synchronization status:



In an active session, all of the features of Contributor Client are available and functional.

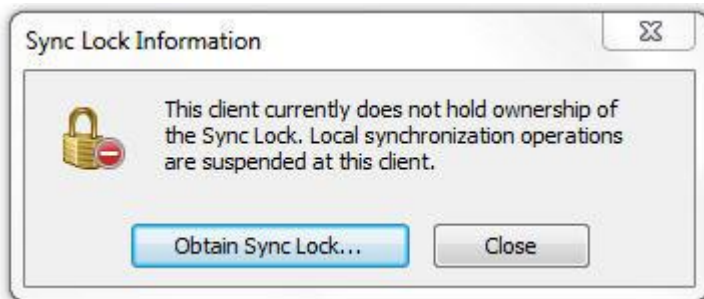
### Inactive (Suspended) Session Status

The Client indicates it is not the active session by displaying the following icon in the main toolbar:

#### Inactive Contributor



Clicking the icon displays confirmation of the Synchronization status and offers the option to transfer control to this session:

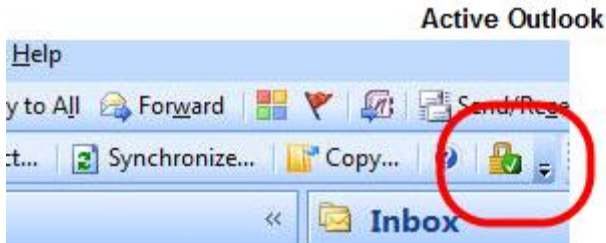


When the Client is in this state, the normal user interface is suspended and only the **Help** and **SyncLock** buttons are active. Other actions result in a warning message that this session is not the active one.

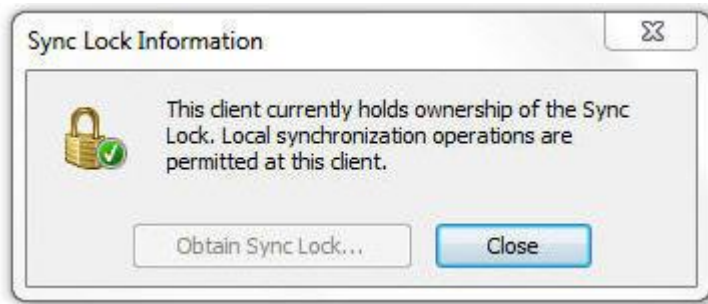
## OUTLOOK ADD-IN & UPLOADER

### Active Session Status

The Outlook Add-in indicates that it is the active Contributor client by displaying the following icon in the main toolbar:



Clicking the icon displays confirmation of the Synchronization status:



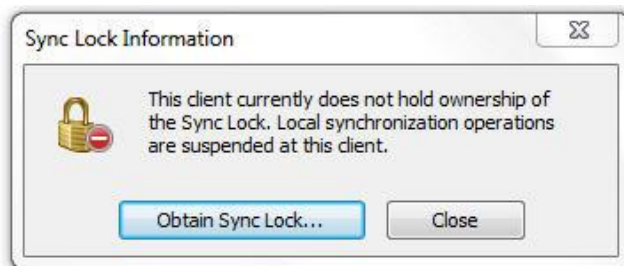
In an active session, all of the features of Contributor Outlook Add-in are available and functional.

## Inactive (Suspended) Session Status

The Outlook Add-in indicates that it is not the current active session by displaying the following icon in the main toolbar:



Clicking the icon displays confirmation of the Synchronization status and provides the option to transfer control to this session:



When the Outlook Add-in is in this state, the normal user interface is suspended and only the **Help** and **SyncLock** buttons are active. Other actions result in a warning message that this session is not the active one.