

Colligo Contributor Viewer 4.4 SP2

User Guide



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Introduction

Colligo Contributor Viewer lets you easily download content from SharePoint sites to your local machine for instant read-only offline access.

Please send questions and feedback to support@colligo.com.

Benefits

- Stay up-to-date with offline synchronization
- Find what you need, quickly and easily
- Access document libraries and lists offline

Features

- Synchronize specific folders, libraries, or entire SharePoint sites
- Choose automatic or manual synchronization
- Find content using Windows Desktop Search
- Display content in the same views you're used to on the desktop.
- Easily change offline views to also display by user and date. Multi-value lookups and metadata are supported.
- Enhance use with SharePoint views offline
- Take document libraries offline
- Get read-access to documents and forms
- View both custom and standard lists
- Access events, issues, links, contacts, announcements, tasks, and agendas

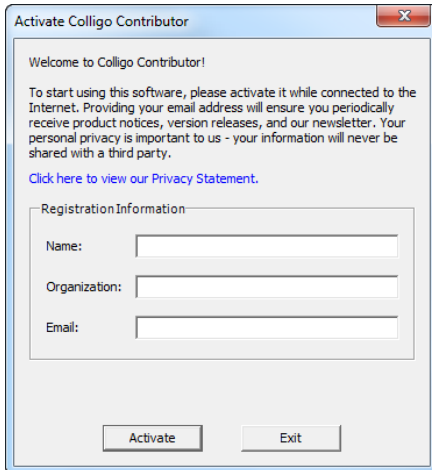
Platforms Supported

- 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)
- SharePoint 2013 Preview
- Outlook 2007, 2010, 2013 Preview (32-bit and 64-bit)
- Windows XP Professional, Windows Vista, Windows 7, Windows 8

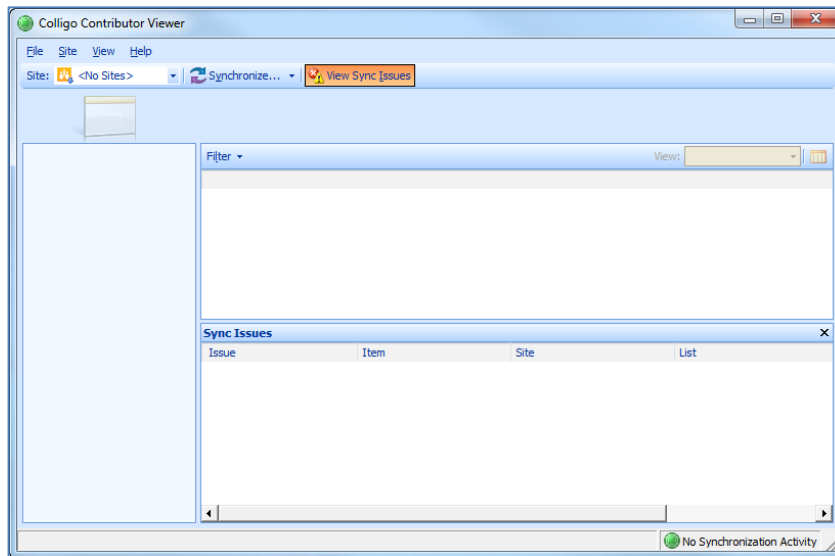
Installing and Activating Contributor Viewer

To install and activate Contributor Viewer:

1. Double-click either Setup.exe or .msi.
2. Follow the steps in the install wizard.
3. After the install is complete, the following dialog displays:



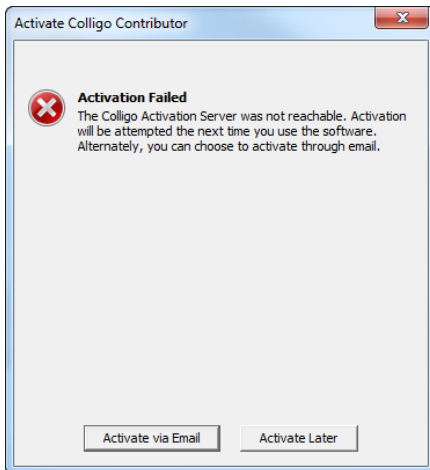
4. Enter your information and click **Activate**. If you do not activate Contributor Viewer, it will not launch.
5. After you have installed Contributor Viewer, choose **Colligo Contributor** from your **Start** menu or from the system tray icon to launch the interface:



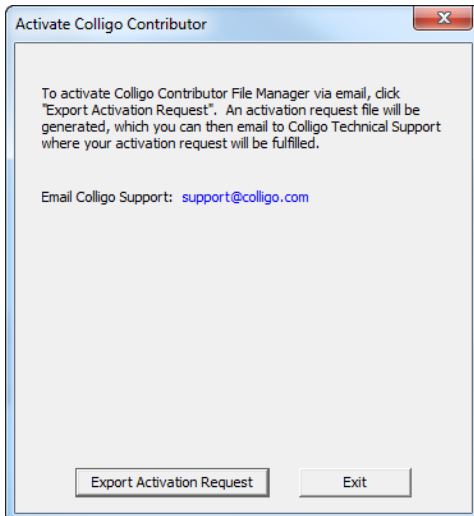
The Document Libraries and Lists display in the left column, and the content of the selected list or library displays in the right section.

Activating Contributor Viewer 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.

Checking for Updates

To 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.

Upgrading to Contributor

If you want to be able to create, edit, or remove content, you can upgrade to Colligo Contributor. To access upgrade options, from the **Help** menu, select **Upgrade to Contributor**. The www.colligo.com site launches.

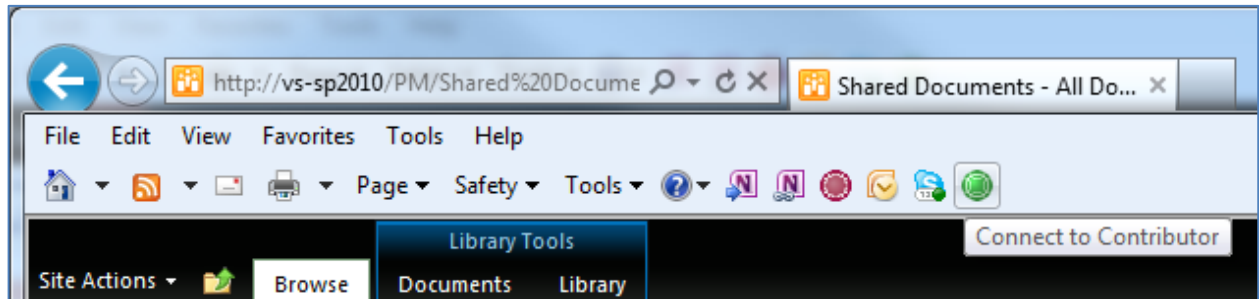
Connecting SharePoint Sites

You can connect your SharePoint sites to Contributor Viewer in one of two ways:

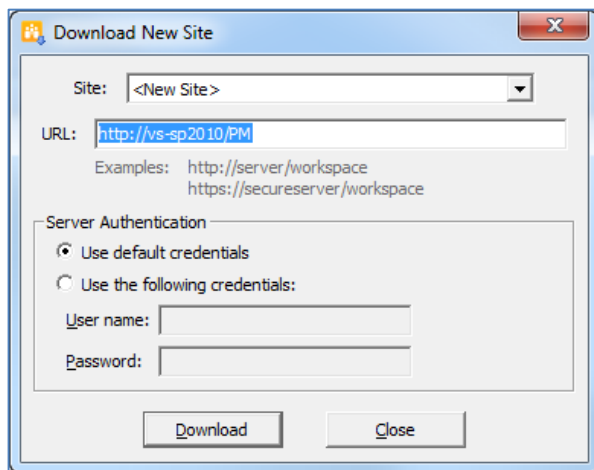
- Using the **Connect to Contributor** option in Internet Explorer
- Using the **Download New Site** option

Using the Connect to Contributor Button

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

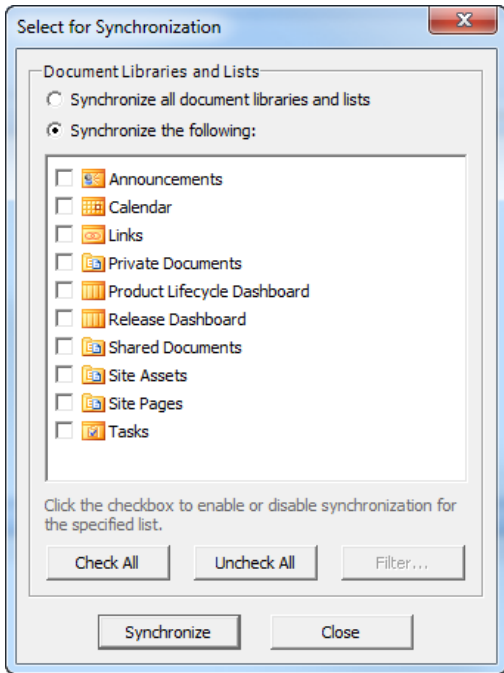


3. The **Download New Site** dialog displays.



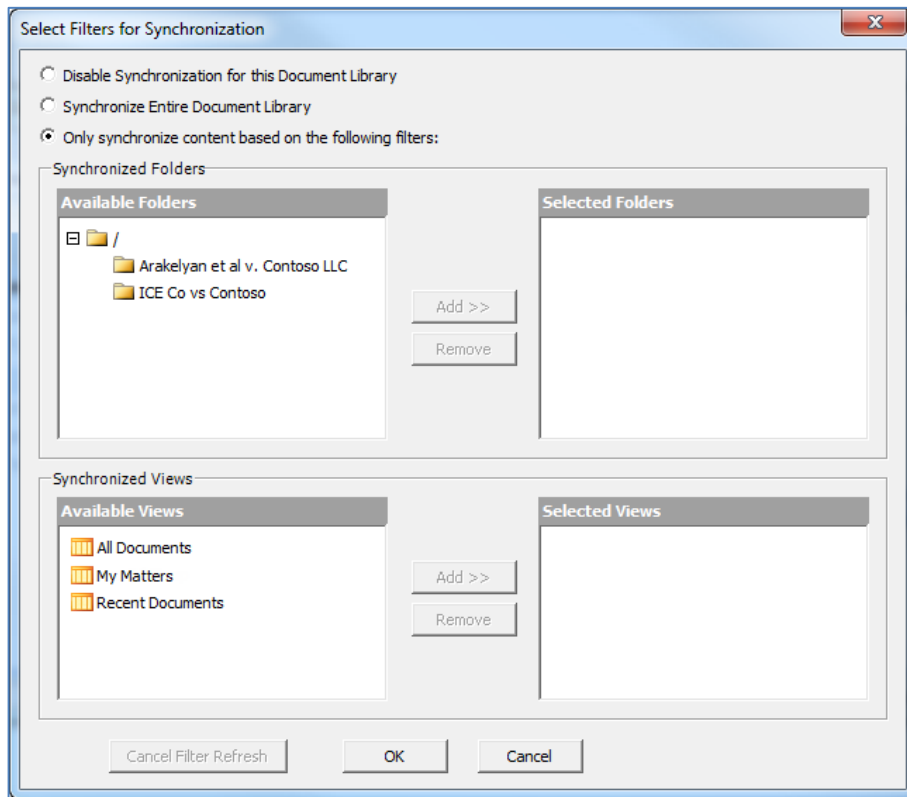
4. Select either your default Windows credentials, or supply other user-specific credentials.
5. Click **Download**.

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

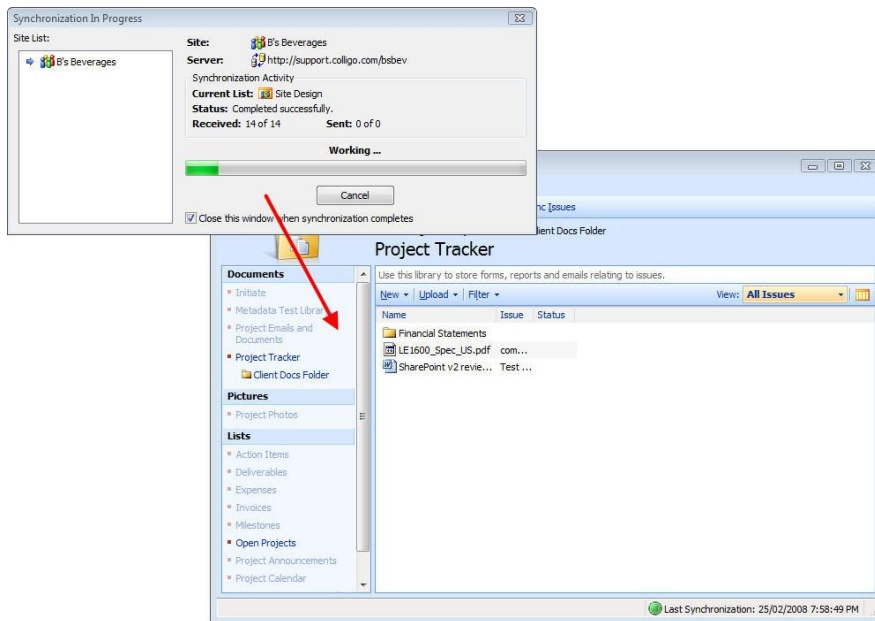


6. Check the boxes beside the lists and libraries you want to synchronize; use the **Check All** or **Uncheck All** buttons if needed.
7. Click **Filter** to select which folders and views you want to synchronize.

The **Select Filters for Synchronization** dialog displays:



8. 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 are synchronized. In the **Synchronized Folders** section, select a folder you want to synchronize and click **Add** to move it to the **Selected Folders** column.
9. Click **OK**.
10. Click **Synchronize** to download the information for the lists and libraries you have selected.

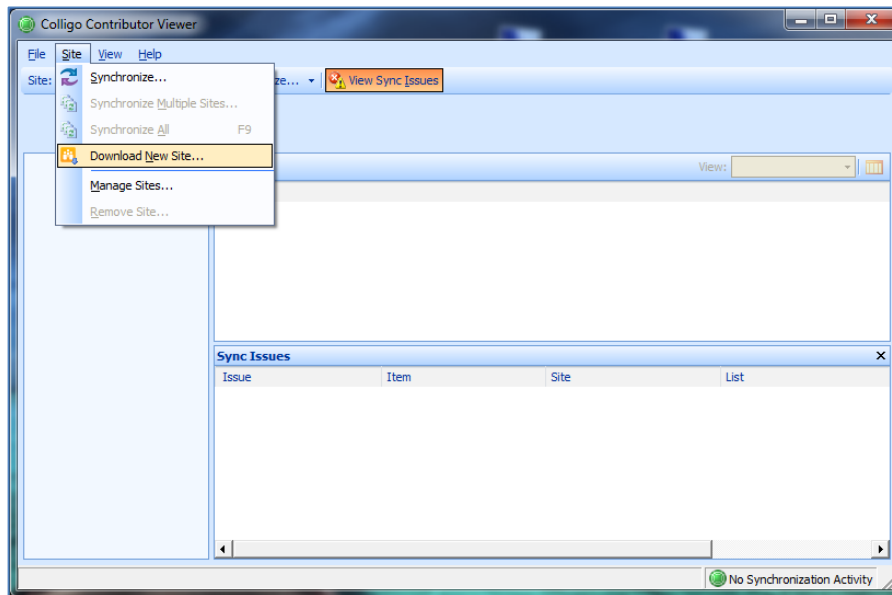


After your synchronization is complete, you can view your offline content.

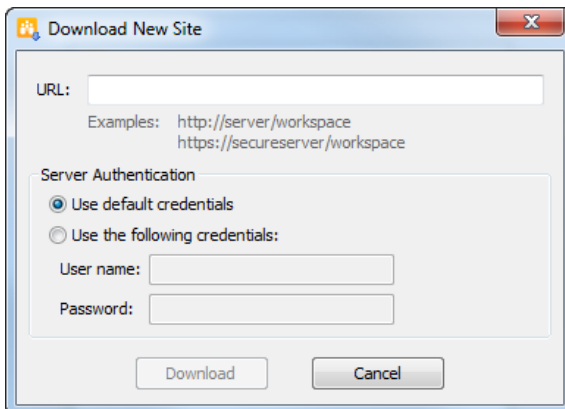
Using the Download New Site Option

To connect a site from within Colligo Contributor Viewer:

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



The **Download New Site** dialog displays:

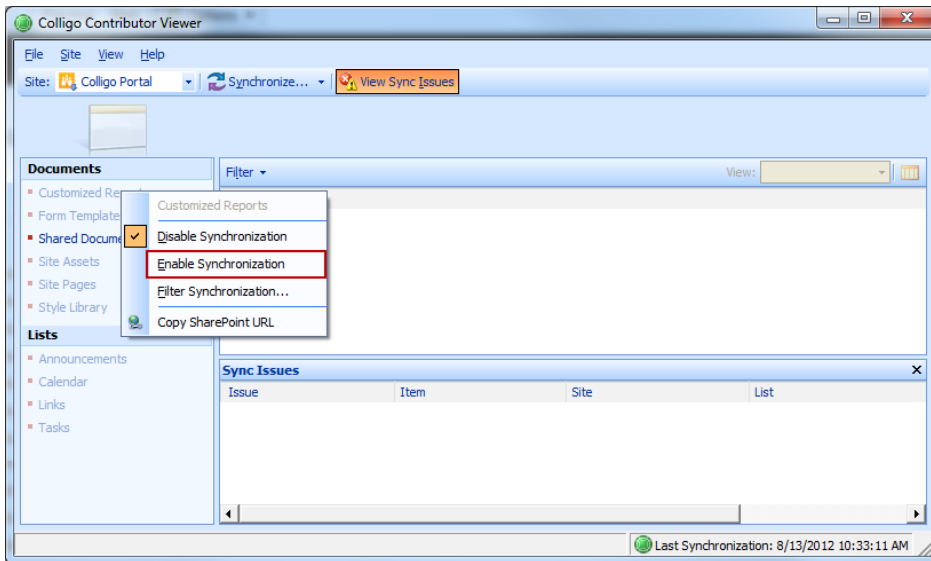


2. Enter the **URL** of the site and enter your default credentials, or user-specific credentials.
3. See steps 5 to 10 of **Using the Connect to Contributor Button**.
After your synchronization is complete, can view your offline content

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:

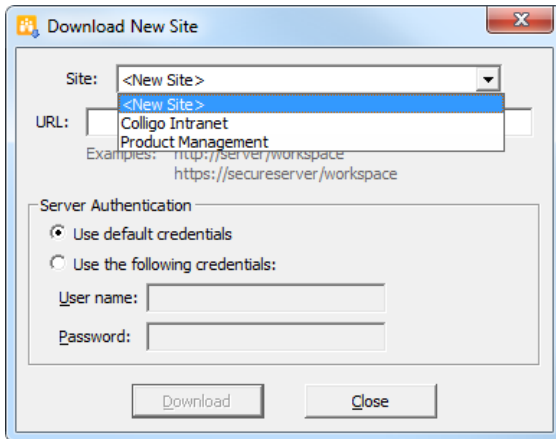


2. Synchronize the site.

OR

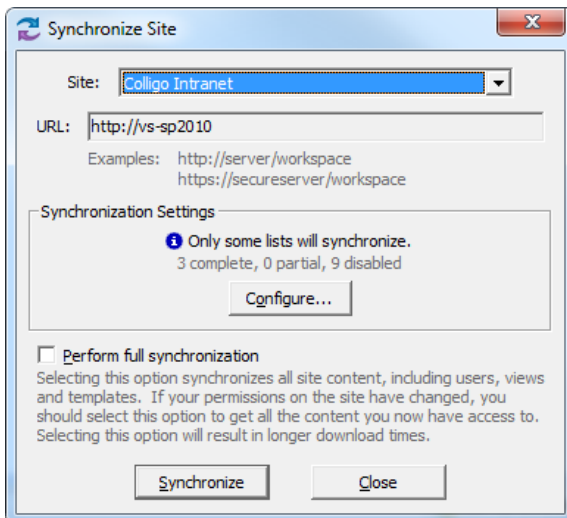
1. From the **Site** menu, choose **Download New Site**.

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:

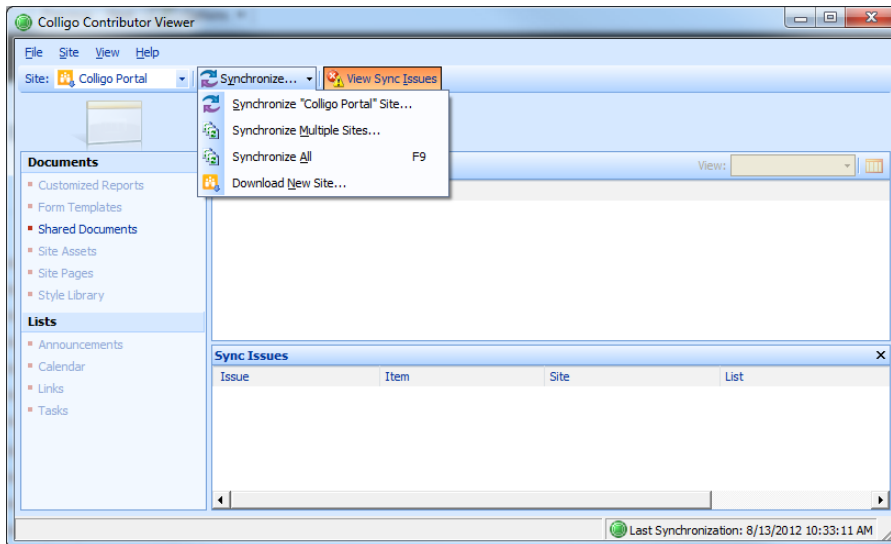


3. Click **Configure**.
4. In the **Configure Synchronization** dialog, choose which Lists and Libraries you want to sync.
5. Click **OK**.
6. Synchronize the new site.

Synchronizing Sites

To synchronize your sites after you have added them:

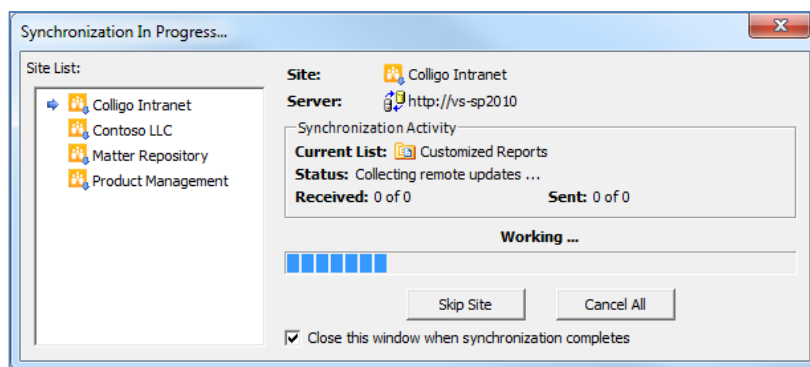
1. Click the **Synchronize** menu to display the options:



2. 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.

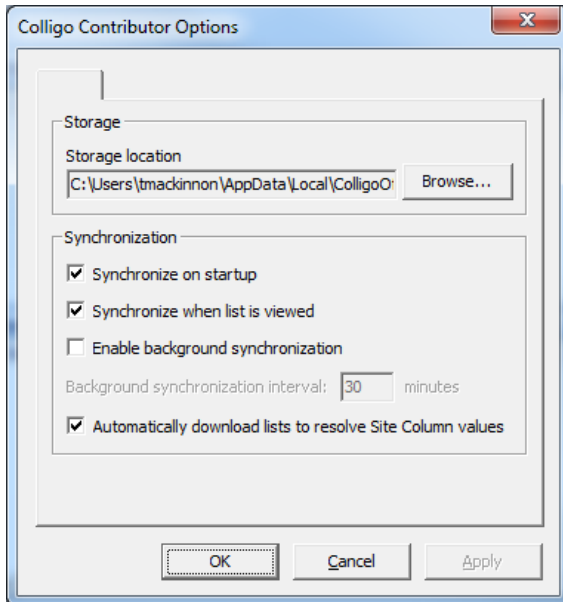
Viewing Content

To view an item's content, double-click it or right-click and select **Open** from the contextual menu.

Setting Synchronization Options

You can specify your synchronization settings so you can ensure your content is up to date.

1. From the **View** menu, select **Options**.
2. The **Colligo Contributor Options** screen displays:

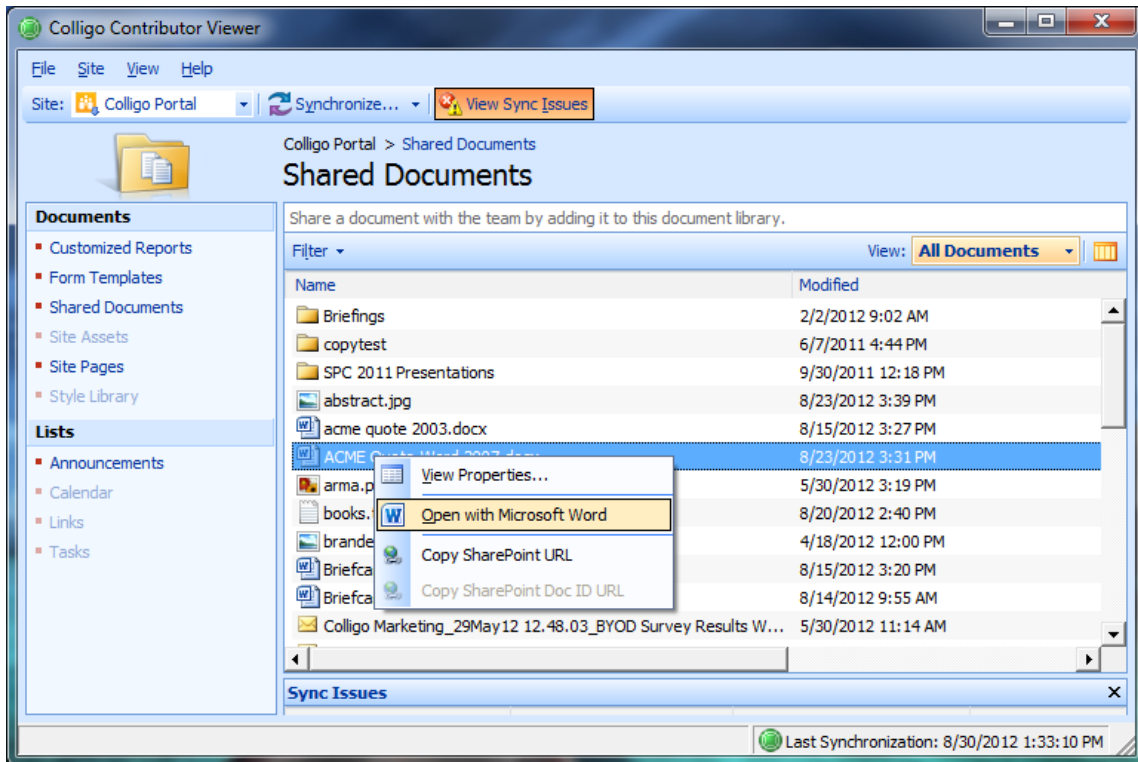


3. Choose from the following options:
 - a) **Synchronize on startup**: choose this option if you want your lists and libraries to synchronize every time Contributor Client starts
 - b) **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time you view a list or library
 - c) **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
 - d) **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
4. Click **OK**.

Viewing Content

To view an item's content:

1. Double-click the item or right-click it and select **Open** from the contextual menu:



2. The item displays in the native program.