



USER GUIDE

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 toolbar. If necessary you can access the Help by launching the Contributor interface from the System Tray and selecting Help->Help and Support.

If you would like further instructions, please consult the Features list at <http://support.colligo.com/Lists/Features/AllItems.aspx> - where you will find a complete list of features by product along with instructions for use. You will also 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 anytime access, online or offline. Please follow the instructions on the home page at <http://support.colligo.com/>.

We hope you enjoy using the product, and please don't hesitate to send us questions or provide feedback at support@colligo.com. Thank You.



Quick Start Contents

- INTRODUCTION..... 1**
- INSTALLING COLLIGO CONTRIBUTOR..... 3**
 - SYSTEMS SUPPORTED..... 3
 - APPLICATION PREREQUISITES..... 3
 - OUTLOOK UPLOADER PREREQUISITES 3
 - INTERACTIVE EXE INSTALL 3
 - UNATTENDED MSI INSTALL..... 3
 - NOTES..... 3
- THE OUTLOOK UPLOADER..... 4**
 - ADDING A SITE TO UPLOADER..... 4
 - Step 1: IE Toolbar button "Connect to Outlook"..... 4*
 - Step 2: Confirm the connection in Outlook..... 4*
 - Step 3: Use Uploader..... 5*
 - CONTRIBUTOR ADD-IN CACHED –VS- ONLINE 5
 - Online Mode..... 5*
 - Cached Mode 5*
- INTEGRATED BROWSER INTERFACE..... 6**
- UPLOADING CONTENT 6**
 - Using Drag-and-Drop 6*
 - Drag from your Inbox into the Outlook tree 6*
 - Drag from your Desktop into the Outlook tree 7*
 - Drag attachment from an email into the Outlook tree 7*
- DEFAULT METADATA AND PROMPTING BEHAVIOR..... 8**
 - INTRODUCING THE METADATA DIALOG 8
 - ACCESSING THE DIALOG 9
 - File Menu 9*
- CONFIGURATION 9**
 - Prompt for properties when adding documents 9*
 - Use current Windows appearance..... 9*
 - Storage location..... 9*
 - Automatically downloads lists to resolve Site Column values..... 9*



Installing Colligo Contributor

Systems Supported

- Microsoft® Windows® Vista: Business; Enterprise; Ultimate. (incl. SP1)
- Microsoft® Windows® XP Home or Professional
- Microsoft® Windows® 2000 Service Pack 2 or greater
- Microsoft Office 2000 – 2007 (Office 2003 SP2 or later for InfoPath forms)
- Internet Explorer 6.0 or later
- WSS (2.0 or 3.0) and SPS 2003 and MOSS 2007
- Consumes roughly 20MB of disk space, not including content
- If you have a previous version installed, the new version can be installed “over top” of the old version without needing to uninstall. This will also preserve all of the cached content.

Application Prerequisites

- **.NET Framework 2.0**
For XP or 2000, please ensure the .NET Framework 2.0 is installed first (included with Vista). You can check in the Control Panel > Add/Remove Program.
- **.NET Framework 3.0**
Required to support embedding and extraction of metadata from Office 2007 documents.

Outlook Uploader Prerequisites

- Compatible version of Outlook (Outlook 2003 or Outlook 2007)
- 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

Interactive EXE Install

1. Download the Colligo Contributor EXE installation file to your local computer.
2. Double-click on the installation file to install Colligo Contributor.
3. Prerequisites are downloaded and installed.
4. Enter your license key.
5. Colligo Contributor can be set to launch at Windows Start Up. This will enable the background synchronization to start automatically.

Unattended MSI Install

1. Install the required prerequisites.
2. Download the Colligo Contributor MSI installation file to your local computer.
3. Double-click on the installation file to install Colligo Contributor.
4. Enter your license key.
5. Colligo Contributor can be set to launch at Windows Start Up. This will enable the background synchronization to start automatically.

Notes

- **Concurrent version installations**
Colligo does *not* support side-by-side installations of different versions of Contributor. ie: it is *not* possible to run multiple versions of Contributor concurrently
- **Version reversion/downgrading**
It is *not* possible to revert to an earlier version of Contributor after upgrading. When installing an update to Contributor, the database is often updated.
- **Microsoft® Windows® 2000**
Microsoft® Office® 2007 is *not* supported on Microsoft® Windows® 2000. Contributor does *not* support metadata embedding and extraction from Office® 2007 documents on Windows® 2000 systems.

More detail installation details are available on the support site:

<http://support.colligo.com/Lists/Knowledge%20Base/DispForm.aspx?ID=16>



The Outlook Uploader

Adding a Site to Uploader

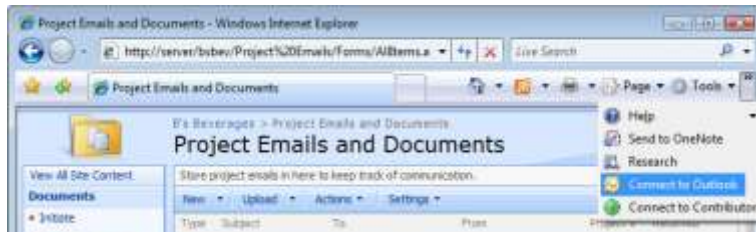
It is possible to add a site to Contributor in a number of other ways, including:

- Use the “Connect to Outlook” option in Internet Explorer
- Site -> Download Site menu option
- Click the site selector drop-down and select “Download Site...”

The simplest approach is using the “Connect to Outlook” option. This process is described below.

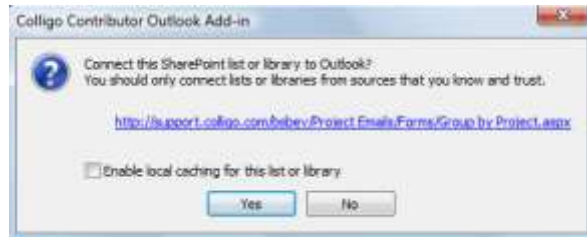
Step 1: IE Toolbar button “Connect to Outlook”

Navigate to a SharePoint List or Library in Internet Explorer
Click the yellow “Connect to Outlook” icon on the toolbar



Step 2: Confirm the connection in Outlook

Contributor will start Outlook if it is not already running and confirm that you wish to connect the library to Outlook.



For an introduction to the difference between “Online” and “Cached” read the [Contributor Add-In Cached vs Online](#) section of this document.

You may be prompted for credentials to connect to the SharePoint site.
You may use your default Windows credentials, or supply other specific credentials.





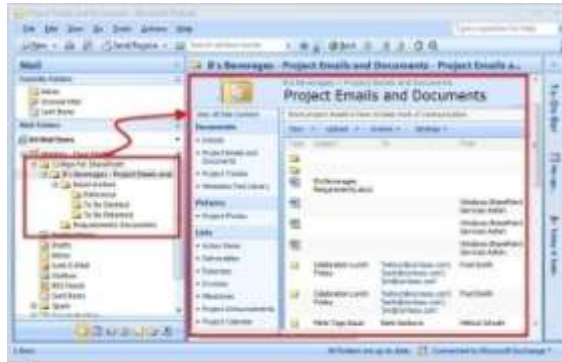
If the “Connect to Outlook” process is started on a page that does not relate to a SharePoint List you will receive a message box as shown below. Simply click OK, navigate to a List in IE and click “Connect to Outlook again.”



Step 3: Use Uploader

Once Contributor has finished downloading the List definitions the folders are made available in Outlook. Contributor will build out a tree for the subfolders of the selected document library.

The Online view is presented below:



Contributor Add-In Cached –vs- Online

The full Contributor Add-In functions in two ‘Modes’, Online and Cached.. Contributor Uploader only supports the Online mode.

Online Mode

Key functionality of Contributor Uploader operating in Online Mode is:

- Does not maintain a cache of data
- Upload content to SharePoint with metadata Prompt
- View the SharePoint site in Outlook
- Navigate through SharePoint site using Outlook folder tree
- Automatically extract Email metadata (To, From, Sent, Subject, etc)

Cached Mode

Key additional functionality of Contributor Add-In operating in Cached Mode is:

- Content is cached providing offline access
- Upload content to SharePoint with metadata Prompt
- Access and Edit existing SharePoint content including accessing metadata.
- Automatically extract Email metadata (To, From, Sent, Subject, etc)



Integrated Browser Interface

If you click on an Outlook folder under the Colligo for SharePoint area it will launch a browser to the required SharePoint location.

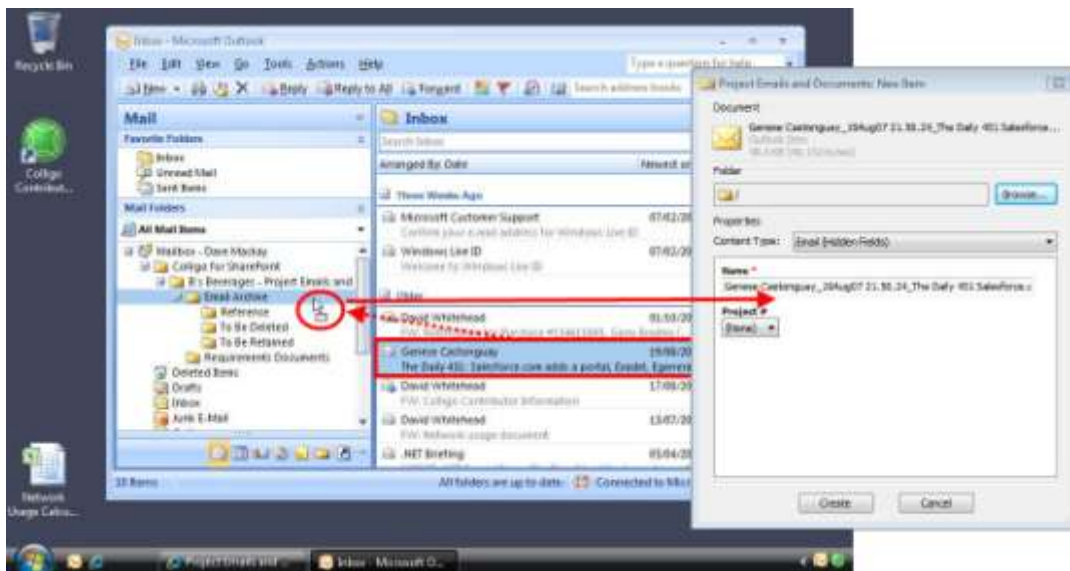


Uploading Content

Using Drag-and-Drop

Drag from your Inbox into the Outlook tree

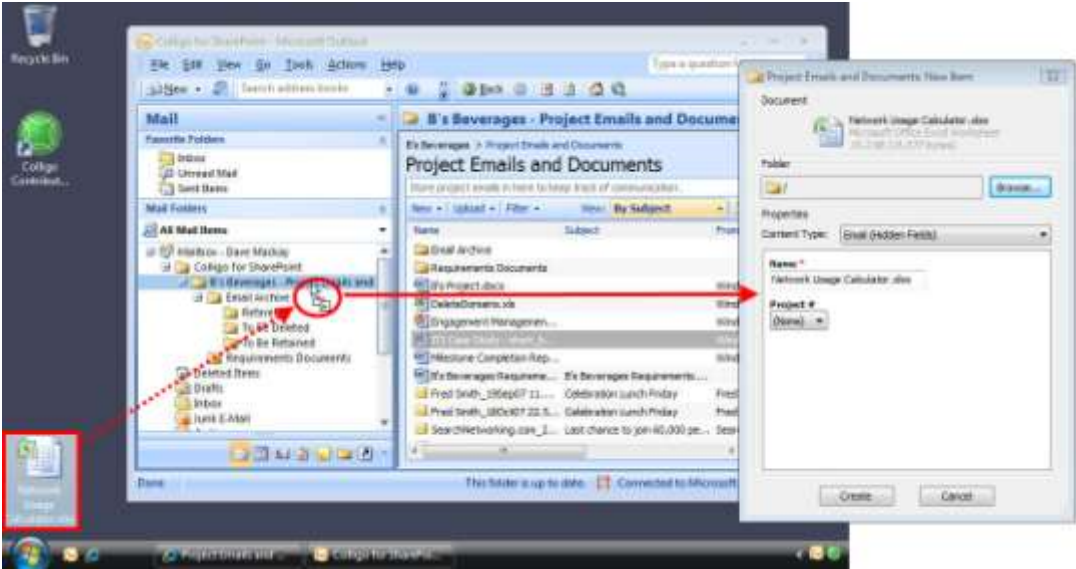
- Emails can be uploaded to SharePoint simply by drag-and-drop direct from your Inbox into a folder Connected to Outlook.
- Contributor automatically extracts email metadata (To, From, Sent, Subject, etc) to similarly named SharePoint columns (if they are defined).
- .msg format maintains fidelity of the message, including attachments
- Unique SharePoint filename generated based on Sender, Sent, and, Subject





Drag from your Desktop into the Outlook tree

- Files can be uploaded to SharePoint simply by drag-and-drop direct from your Desktop (or My Computer) into the Outlook folder tree
- Contributor will prompt for metadata
- Contributor uploads the file to the selected library



Drag attachment from an email into the Outlook tree

- Attachments can be uploaded to SharePoint simply by drag-and-drop direct from an email into the Outlook folder tree (or Contributor Cached View).
- Contributor will prompt for metadata
- Contributor uploads the file to the selected library

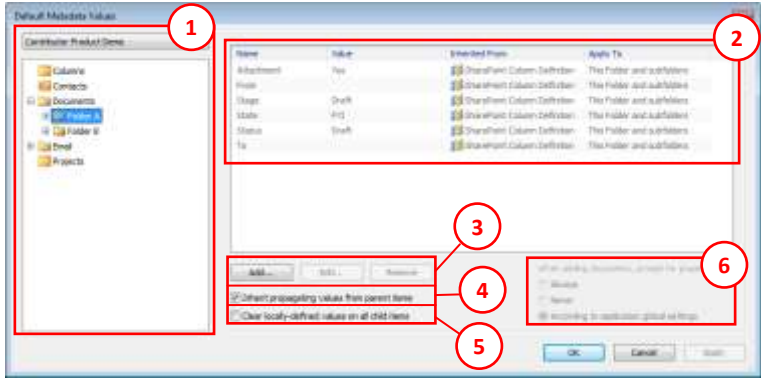


Default Metadata and Prompting Behavior

Contributor allows you to specify default values for metadata. Default values can be set at a document library, or sub-folder level. The default values support both inheritance and propagation.

Introducing the Metadata Dialog

A sample of the Default Metadata dialog is displayed below. The following table explains the function of the dialog.



1. List Selector Panel
2. Default Value Settings
3. Add, Edit and Remove
4. Inherit propagating values from parent items
5. Clear locally-defined values on all child items
6. Prompting Behavior

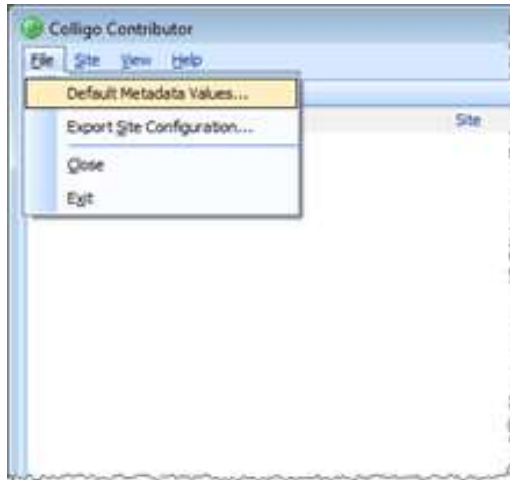
List Selector Panel	The List Selector allows you to change the List or Subfolder you wish to work with. <i>NOTE: The List selector is only visible if the dialog is access through the File menu.</i>	
Default Value Settings	Name	The Display Name of the SharePoint column
	Value	The default value to be applied.
	Inherited From	Indicates where Contributor receives this value from. The 'Inherit From' column may take the following values: <ul style="list-style-type: none"> • SharePoint Column definition • <not inherited> <i>Parent Object Name.</i> This may be the name of a document library of parent folder.
	Apply To	Indicates whether the default value may be inherited by a subfolder. The 'Apply To' folder may take the following values: <ul style="list-style-type: none"> • This Folder and subfolders • This Folder only
Add, Edit and Remove	This buttons allow you to work with the locally-defined default values. Multiple items can be selected for removal using the Windows standard Ctrl and Shift selection modifiers.	
Inherit propagating values from parent items	This folder will inherit propagating values from the parent item. Values specified with 'This Folder and subfolders' are propagating values and may be inherited. When un-checking the option Contributor provides the option to copy inherited values locally.	
Clear locally-defined values on all child items	When settings are applied with this values checked, child-items are reset to inherit values; any user-specified default values on child-items are cleared.	
Prompting Behavior	Modify the prompting behavior. The options are: <ul style="list-style-type: none"> • Always: The metadata prompt will be displayed when an item is added • Never: The metadata prompt will *not* be displayed when an item is added • According to application global settings: Prompting behavior is as defined in the View-> Options dialog Child-items that are configured for inheritance will inherit this setting.	



Accessing the Dialog

File Menu

The file menu may offer different options according to the flavor of Contributor deployed. The Contributor Control Panel interface may be accessed by double-clicking the Contributor icon in the system tray.



Control Panel

* When accessed through the File menu, the Default Metadata dialog includes the List Selector Panel.

Configuration

Contributor provides easy access to the common configuration options:

Prompt for properties when adding documents

By default Contributor prompts for metadata when content is added. This option allows you to disable the prompt. If the prompt is disabled content is uploaded to SharePoint with default metadata.

Use current Windows appearance

Switch Contributor's UI between a Windows application look-and-feel and a WSSv3 style look-and-feel. With the Windows appearance Contributor will adopt the underlying Windows color scheme.

Storage location

You are able to move the Contributor cache to another location.

Automatically downloads lists to resolve Site Column values

Contributor will ensure that data for Lookup columns is also synchronized.