



## USER GUIDE

### Introduction

This User Guide is designed to serve as a brief overview to help you get started in a Terminal Server environment. There is also information on the product features 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](mailto:support@colligo.com). Thank You.



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## 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® 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 Add-in 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
- Microsoft Visual C++ 2008 SP1 Redistributable Package

### Other Installation Options

More details on installation are available on the support site:

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

### Notes

- **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.
- **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.

### 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 not compatible with terminal server based environments.



## Installation Considerations

There are a number of specific issues which 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 will perform 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 which 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 which is available to all of the servers which a user could login 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 which 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 each are displayed in the users Mailbox and Colligo distinguishes between them by appending the machine name on which the cache and configuration is locally resident.

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 General\DisableMachineId 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

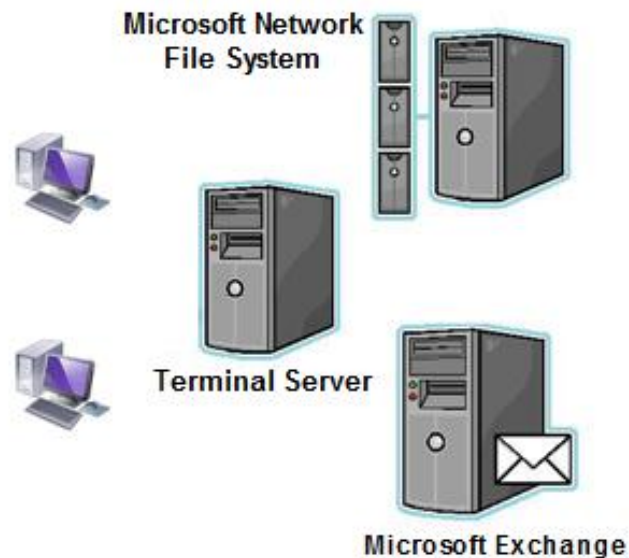
The registry setting field to support single session operation is General\UseSyncLock should be set to 1 Enabled



## User Session Operation

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

1. Terminal Server – one or more servers which 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 which 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 which 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 users new access client or the user is disabled from starting further session 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 PC at a single location. The only noticeable effect of the terminal server is that access is to a network storage location and this may be come noticeable if there are network conditions which 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 multi-session 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 will use a “follow me” process to always enable service at the latest new session. On starting up a new session Contributor will divert synchronization to the local client and other Contributor client, running in other session will suspend operations. Logging out of the session will cause 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 the user 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 will be updating the same Contributor cache and configuration database and so the user will 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 leaving the application open this can cause the file to be locked and not accessible from any other session. This is inherent in terminal server environments and is not specific to Contributor.



## The Desktop Client

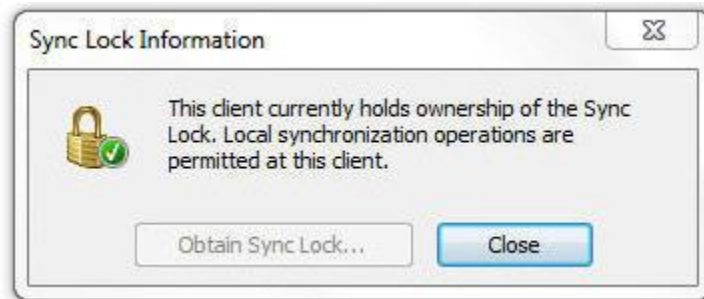
### Active Session status

The Client indicates that it is the active Contributor client by displaying a green status in the main toolbar.

#### Active Contributor



Pressing the button provides confirmation of the Synchronization status.



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

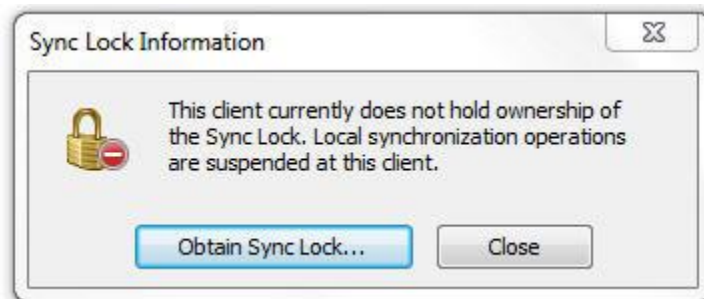
### Inactive (Suspended) Session Status

The Client indicates that it is not the current active session by displaying a red status in the main toolbar.

#### Inactive Contributor



Pressing the button provides confirmation of the Synchronization status and the option to transfer control to this session...



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



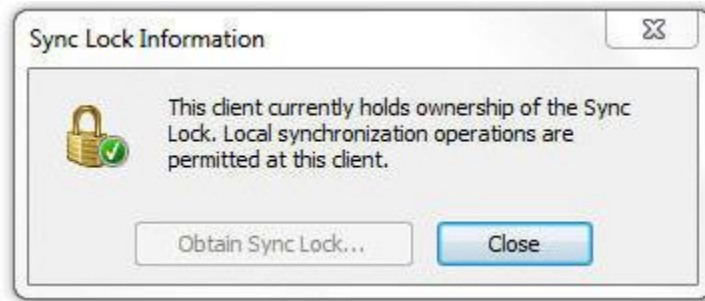
## The Outlook Add-in & Uploader

### Active Session status

The Outlook Add-in indicates that it is the active Contributor client by displaying a green status in the main toolbar.



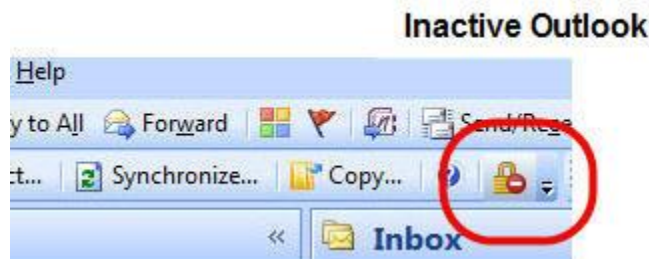
Pressing the button provides confirmation of the Synchronization status.



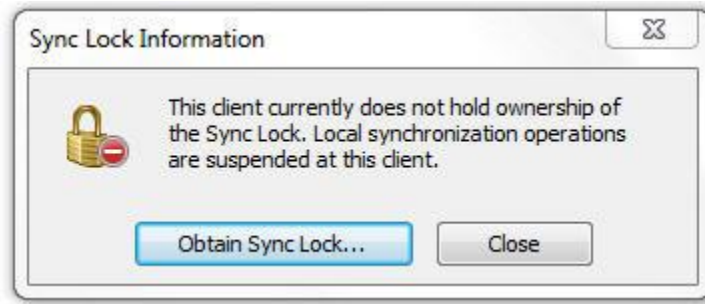
In an active session all of the features of Contributor Outlook Add-in are available and functional.

### Inactive (Suspended) Session Status

The Outlook Add-in indicates that it is not the current active session by displaying a red status in the main toolbar.



Pressing the button provides confirmation of the Synchronization status and the option to transfer control to this session...



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