



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.



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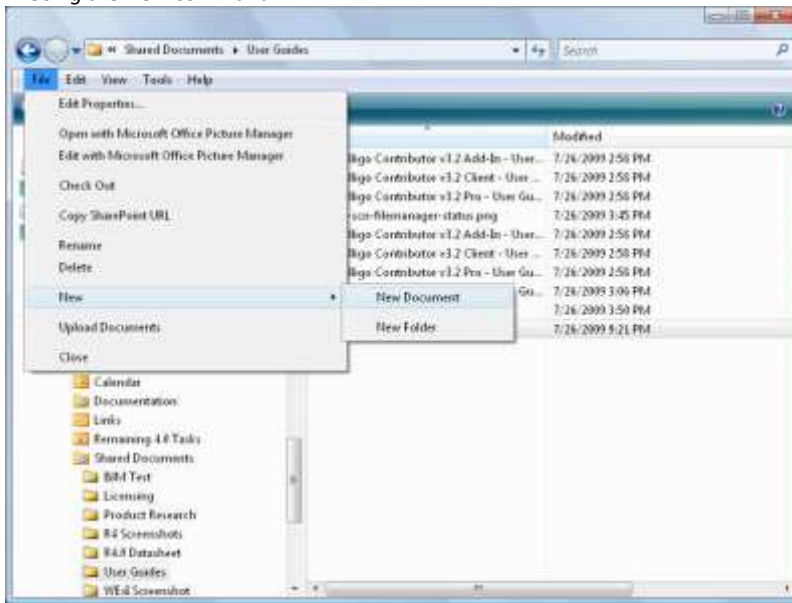
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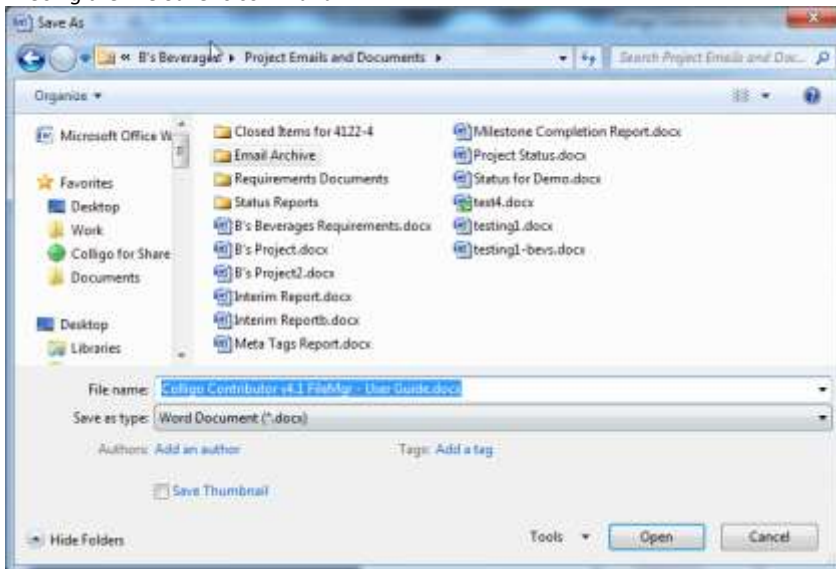
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Installing Colligo Contributor

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 – 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)
- 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

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.

Interactive MSI Install

1. Check and ensure the prerequisites are installed.
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.

Terminal Server Install

For information on installing in a Terminal Server environment see the [Colligo Contributor Terminal Server User Guide](#)

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.



The Desktop Client

Adding a Site to Contributor

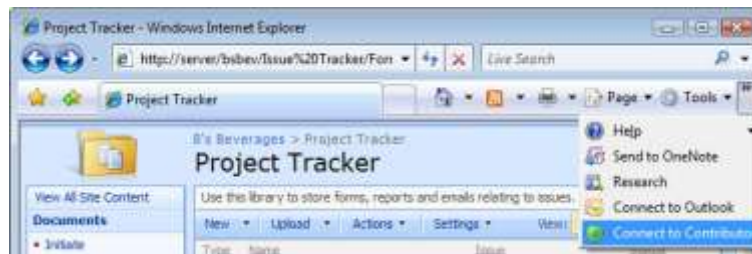
It is possible to add a site to Contributor in a number of other ways, including:

- Use the “Connect to Contributor” option in Internet Explorer
- Site -> Download Site menu option
- Click the site selector drop-down and select “Download Site...”
- Drag and Drop a URL from IE Into Contributor

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

Step 1: IE Toolbar button “Connect to Contributor”

Navigate to a SharePoint site in Internet Explorer
Click the green “Connect to Contributor” icon on the toolbar



Step 2: Enter your credentials

Contributor will prompt you to enter your credentials for this site. You may use default windows credentials or enter other specified credentials.



Contributor will access the SharePoint web-services and request a list of Lists and Libraries you have access to.

Step 3: Choose the lists to sync

Once Contributor has received the list of Lists you are able to select which Lists you wish to synchronize. You may choose to:

- Synchronize all document libraries and lists.
- Synchronize specific lists (described below)

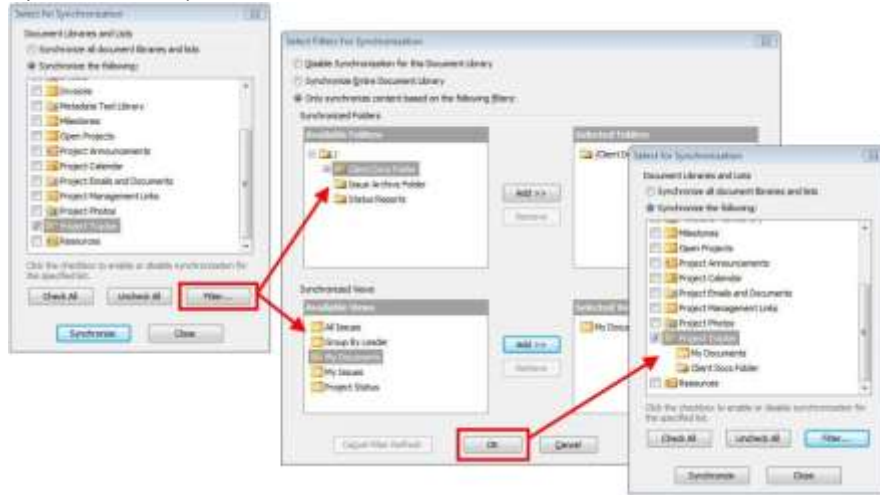
Select the lists you wish to Synchronize by ticking the box next to the list in the “Select for Synchronization” dialog.

Step 3.1: Apply Sync-Filters

You may apply a filter to each list to restrict cached content. Available filters are

- All folders or specified folders. All subfolders will also be synchronized.
- A collection of Views. Contributor will synchronize all content selected in any View.

The “Select Filters for Synchronization” process is shown below:



Step 4: Synchronize content

Contributor synchronizes the selected content.



Once Synchronization is complete you are ready to start working with cached content.

Editing content

Open a document by double-clicking on the item

Right-click on an item to:

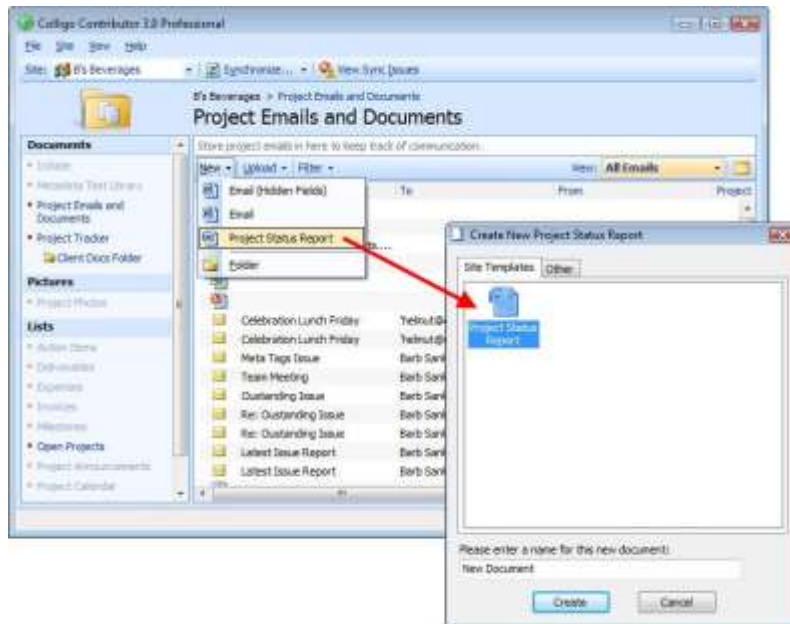
- Edit the properties (metadata) of the item.
- Open/Edit a document
- Check Out; Check In; or Discard Check Out
- Rename content
- Delete content



Creating new content

New content can be created by selecting the “New” option.

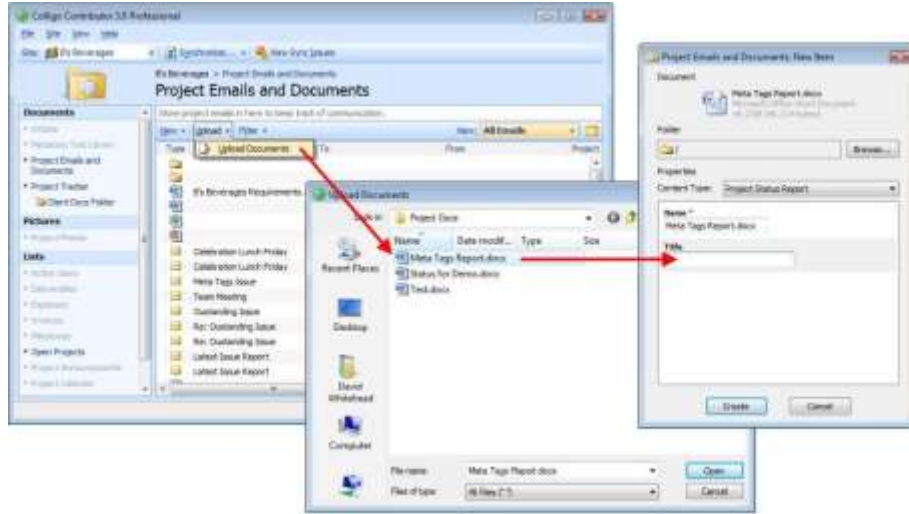
On SharePoint 2007 site content can be created based on content-type templates.



Uploading existing content

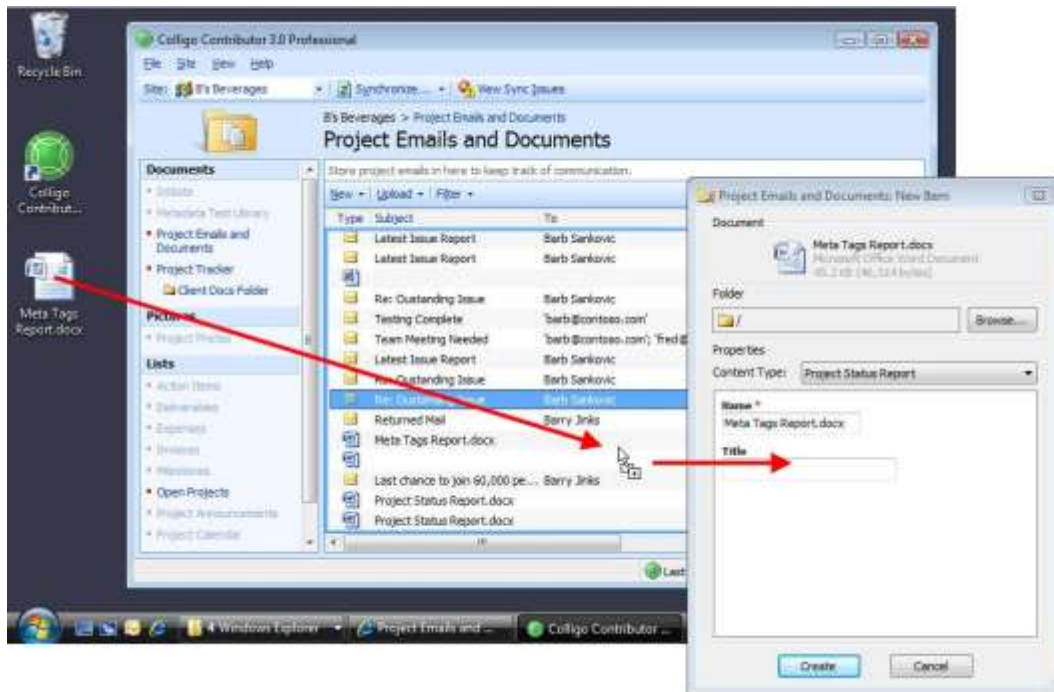
Using “Upload Documents” menu

Existing content can be added to Contributor by selecting the “Upload” option: Contributor will prompt for metadata when the document is uploaded.



Upload content with drag-and-drop

Alternatively you can drag and drop content into Contributor from your desktop. Contributor will accept one or more files or complete folder structures for uploading. Contributor will prompt for metadata when the items are uploaded.



Copying existing content

Drag-and-drop

Existing content, files or folder structures, can be copied between SharePoint document libraries or folders by a drag and drop operation. A new copy of the files or folders is created in the destination location and Contributor will prompt for metadata. In cases where the metadata structure in the destination library is different from the source library Contributor will make a best effort to match and retain existing metadata values.

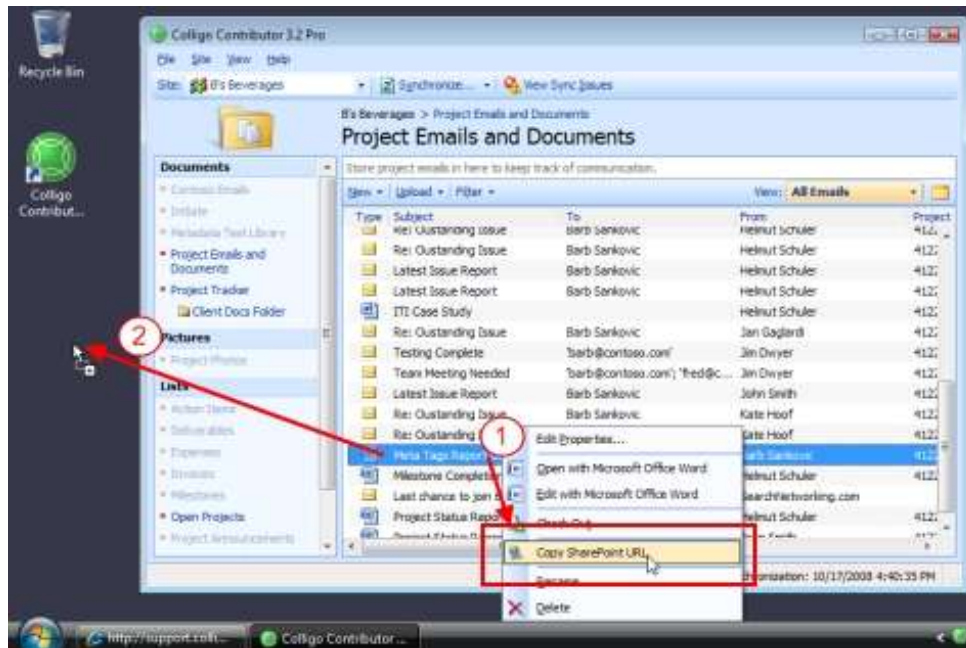
Share Content with other users

Copy SharePoint URL

You can share content with other users by right-clicking on an item and selecting “Copy SharePoint URL”, URLs for the selected item(s) are copied to your clipboard and can be pasted into many applications, files, or emails.

Drag-and-Drop

Alternatively, for users that do not have access to the SharePoint site it is possible to drag and drop files or folder structures from the Contributor Client into a Windows folder, a file, or as an attachment to an email.



The Outlook Add-In

Adding a Site to Outlook

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...”
- Drag and Drop a URL from IE Into Contributor

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. You may choose to connect the List ‘Online’ or ‘Cached’.



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 the Contributor Add-In

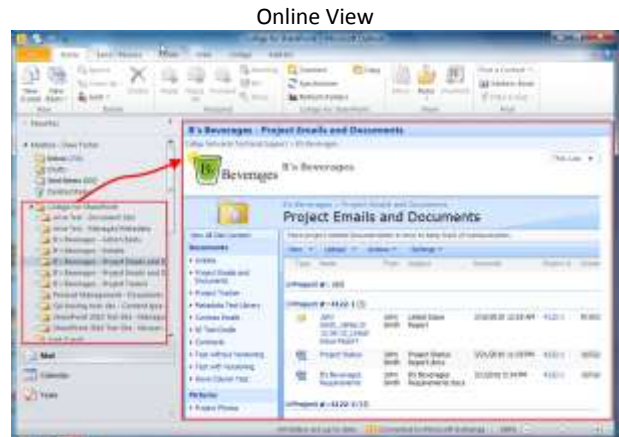
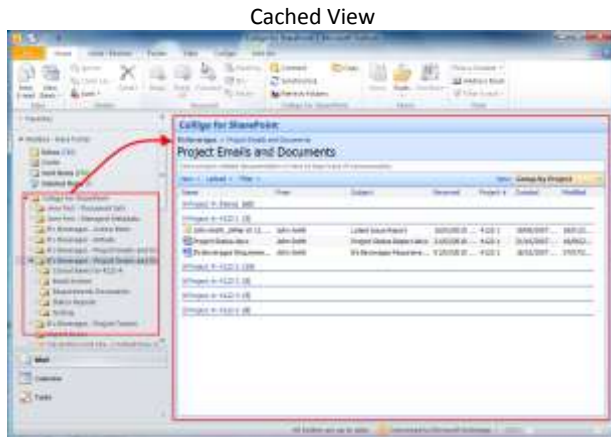
Once Contributor has finished downloading the List definitions the folders are made available in Outlook. Contributor will build out a tree for the subfolders of the selected document library.

Contributor Add-In Cached –vs- Online

Contributor Add-In functions in two ‘Modes’, Online and Cached.

If you attempt connect a list to Outlook that has already been synchronized in Cached Mode Outlook will present the SharePoint View of the list, however the list will remain synchronized in Cached Mode.

The Online and Cached views are presented below:



Online Mode

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

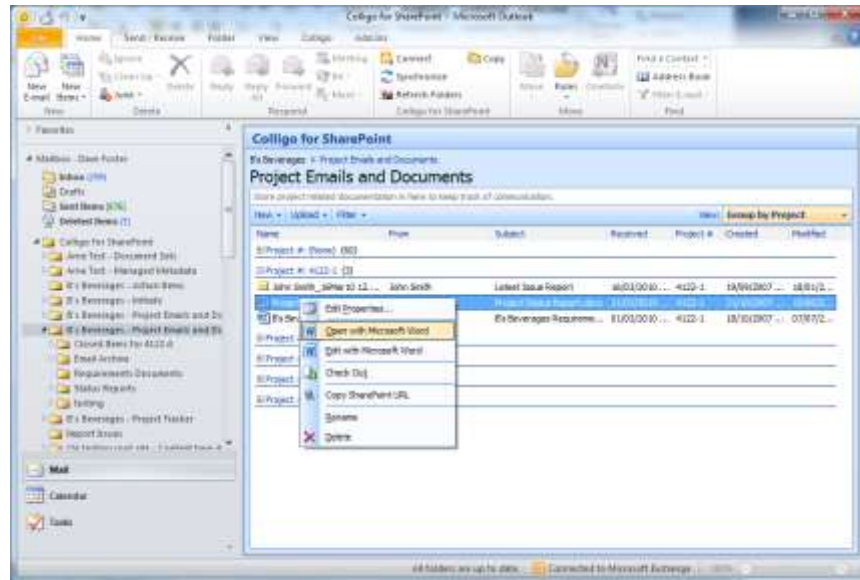
- Content is cached providing offline access
- Upload content to SharePoint with metadata Prompt
- Access and Edit existing SharePoint content including accessing metadata.
- Automatically extract Email metadata (To, From, Sent, Subject, etc)



Editing content in Cached Mode

Select the folder in Outlook to access the Contributor Add-In Cached-View of the List.

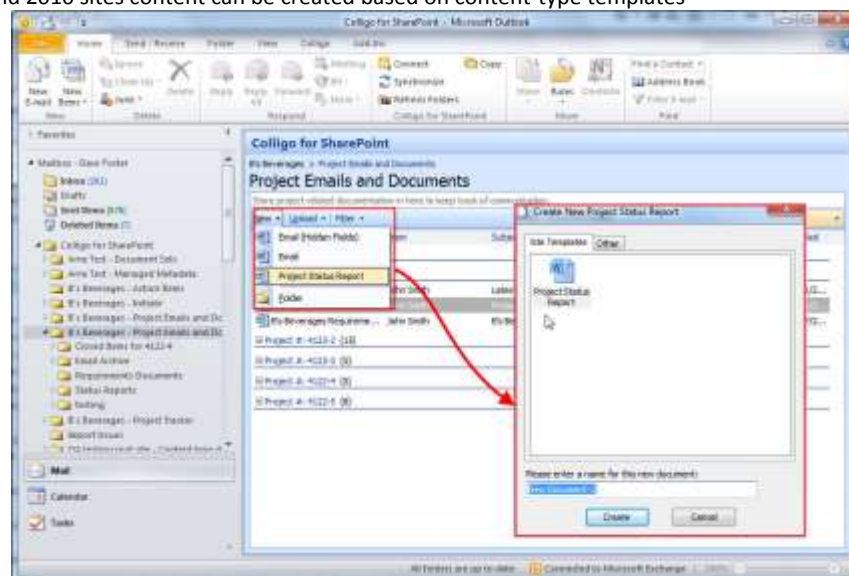
- The Cached view provides access to the content. Here you can work with your content and perform the actions below:
- Open a document by double-clicking on the item
- Right-click on an item to:
 - Edit the properties (metadata) of the item.
 - Open/Edit a document
 - Check Out; Check In; or Discard Check Out
 - Rename content
 - Delete content



Creating new content in Cached Mode

New content can be created by selecting the “New” option.

On SharePoint 2007 and 2010 sites content can be created based on content-type templates

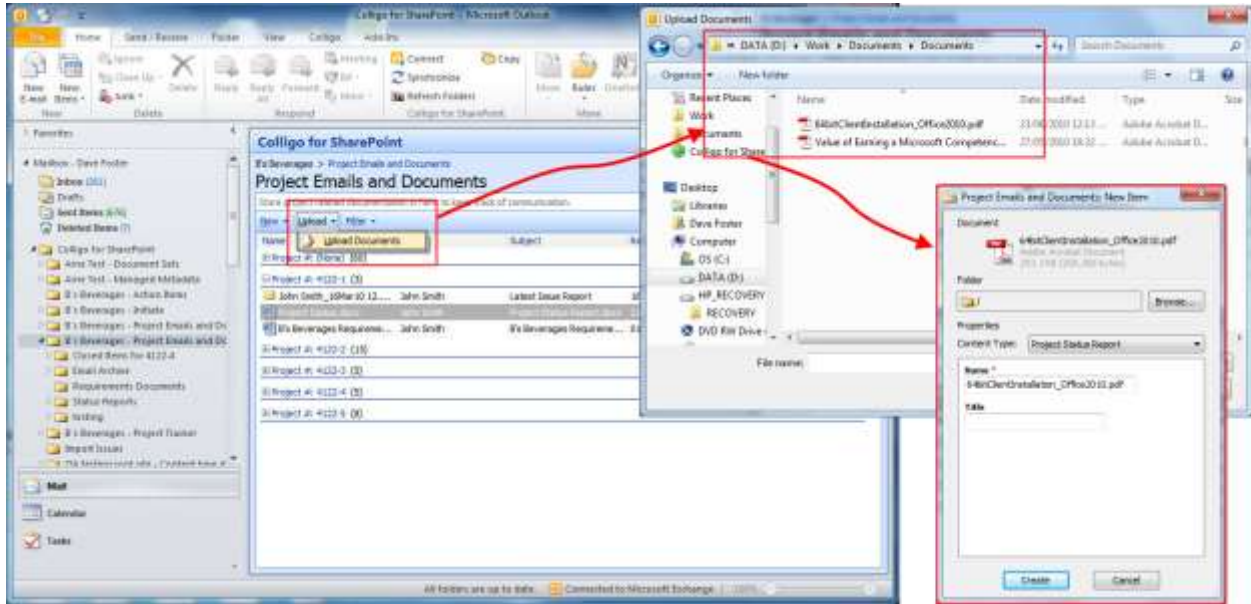




Uploading existing content

Using “Upload Documents” menu

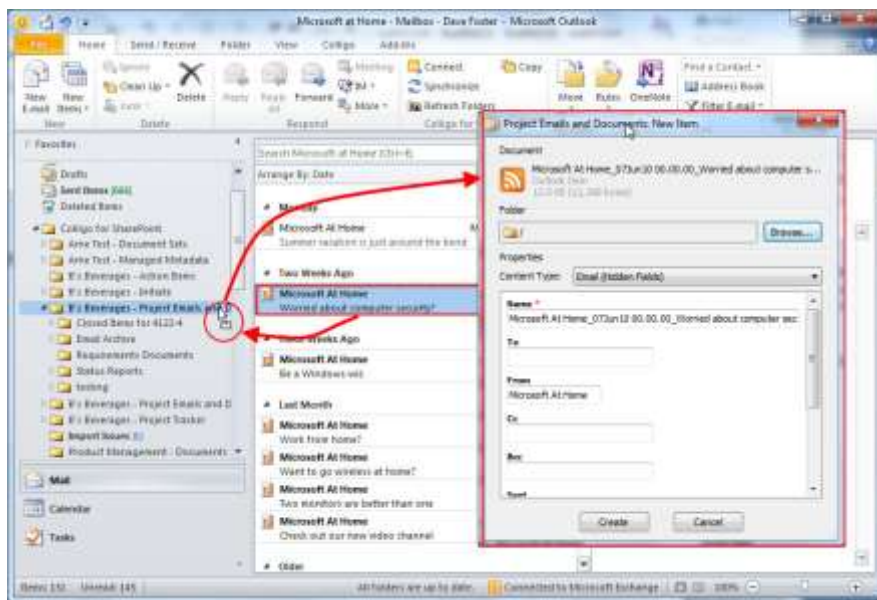
Existing content can be added to Contributor by selecting the “Upload” option. Contributor will prompt for metadata when the document is uploaded.



Using Drag-and-Drop

Drag from your Inbox into the Outlook tree

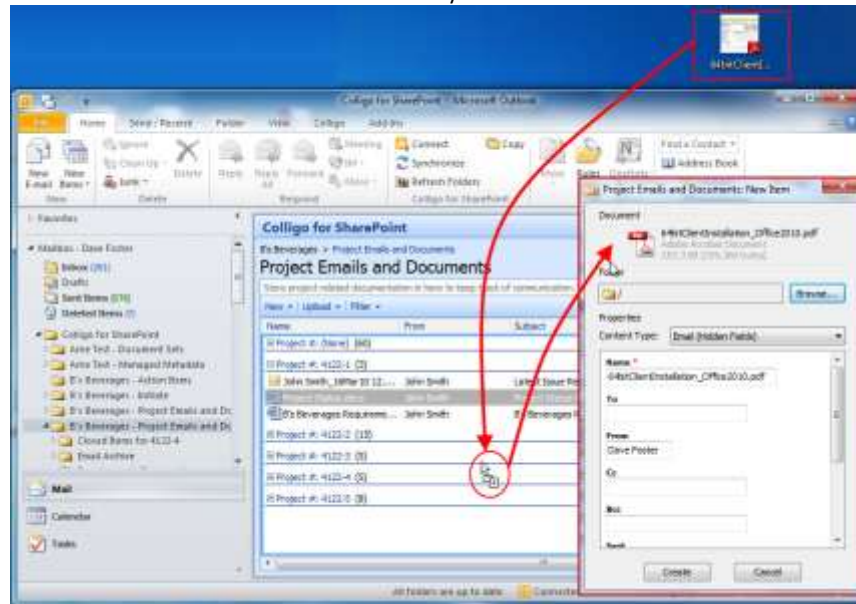
- Emails can be uploaded to SharePoint simply by drag-and-drop direct from your Inbox into a folder Connected to Outlook.
- Contributor automatically extracts email metadata (To, From, Sent, Subject, etc) to similarly named SharePoint columns (if they are defined).
- .msg format maintains fidelity of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





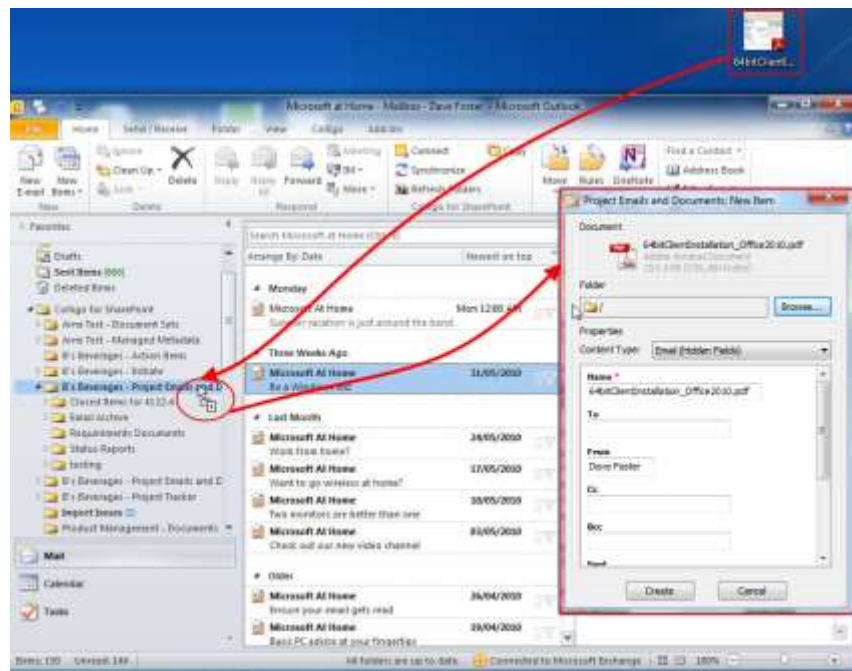
Drag from your Desktop into the Contributor Cached View

- Files or Folder structures can be uploaded to SharePoint simply by drag-and-drop direct from your Desktop (or My Computer) into the Contributor Cached View in Outlook
- Contributor will prompt for metadata
- Contributor uploads the files and folders to the selected library



Drag from your Desktop into the Outlook tree

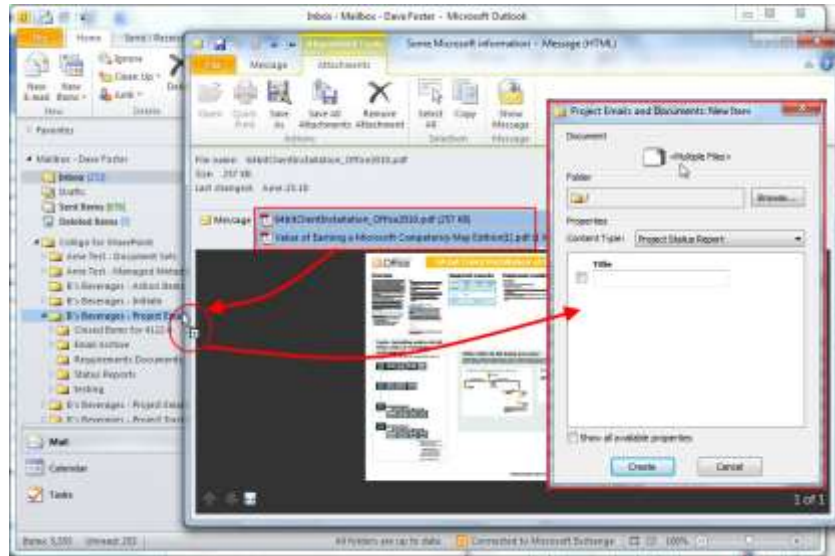
- Files can be uploaded to SharePoint simply by drag-and-drop direct from your Desktop (or My Computer) into the Outlook folder tree
- Contributor will prompt for metadata
- Contributor uploads the file to the selected library





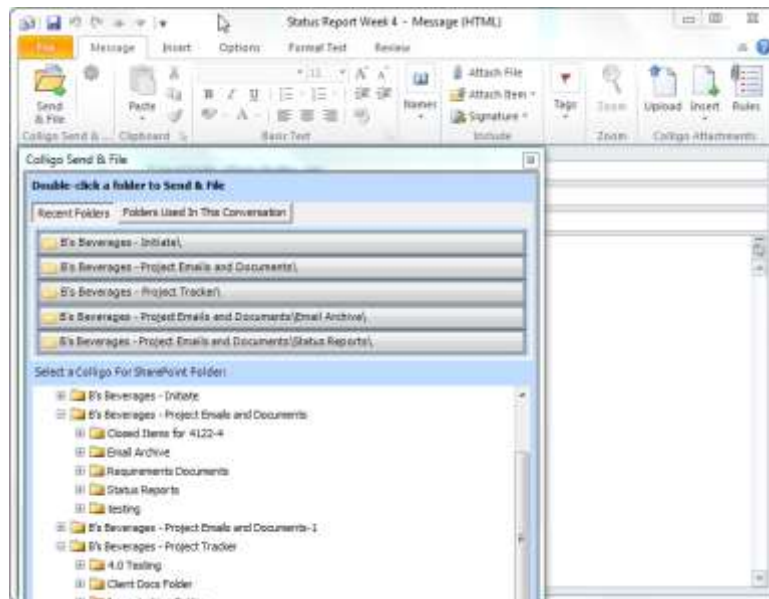
Drag attachment from an email into the Outlook tree

- 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



Using Send and File

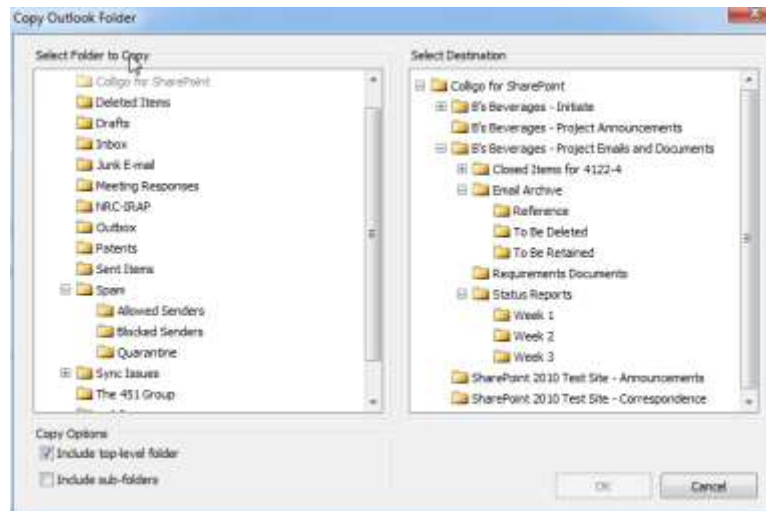
- Automatically store a copy of a sent email using the Send & File command in the Colligo Send & File toolbar
- Select the destination SharePoint location using the Colligo for SharePoint folders in the Outlook folder tree
- Filing Advisor suggestions locations based on recently used folders or email conversation.
- Contributor automatically extracts email metadata (To, From, Sent, Subject, etc) to similarly named SharePoint columns.
- .msg format maintains fidelity of the message, including attachments
- Unique SharePoint filename generated based on Sender, Sent, and, Subject





Using Copy Folder

- Folders and their contents (including sub-folders) from your Mailbox can be uploaded to SharePoint using the Copy folder command in the Colligo toolbar
- A corresponding folder tree is created in SharePoint and the individual emails are uploaded.
- Contributor automatically extracts email metadata (To, From, Sent, Subject, etc) to similarly named SharePoint columns.
- .msg format maintains fidelity of the message, including attachments
- Unique SharePoint filename generated based on Sender, Sent, and, Subject





Copying existing content in Cached View

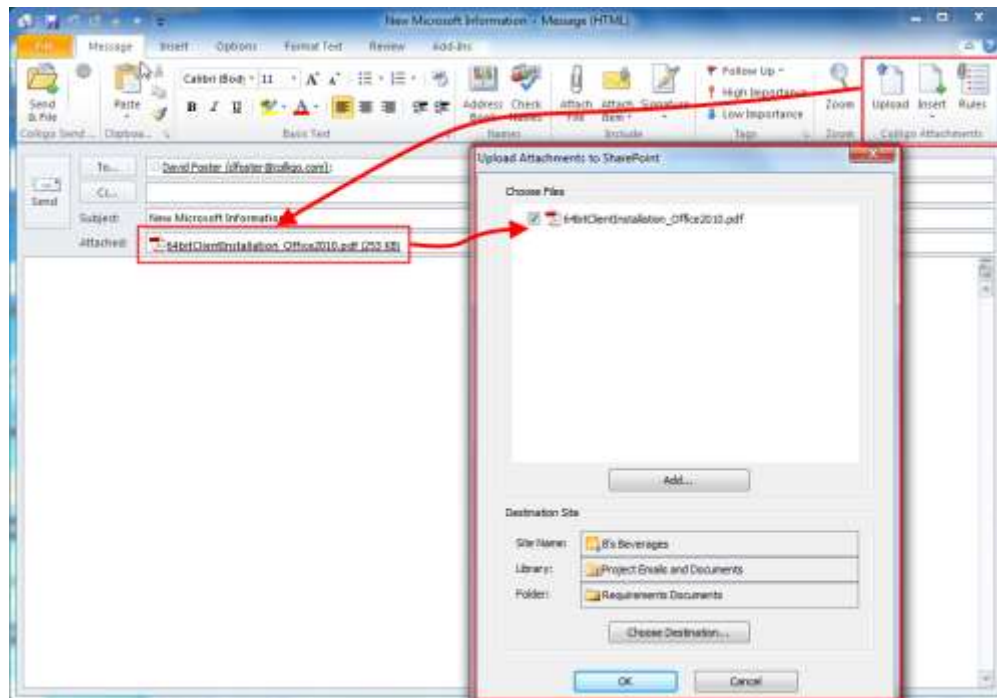
Drag-and-drop

Existing content, files or folder structures, can be copied between SharePoint document libraries or folders by a drag and drop operation. A new copy of the files or folders is created in the destination location and Contributor will prompt for metadata. In cases where the metadata structure in the destination library is different from the source library Contributor will make a best effort to match and retain existing metadata values.

Emailing content as an Attachment

Upload Attachment

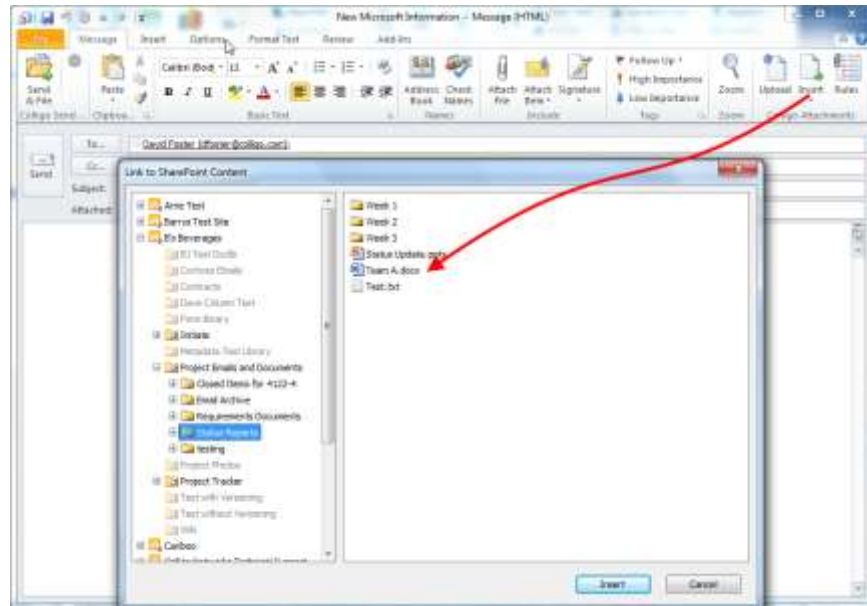
You can share content with other users by sending them a link (SharePoint URL) to the content rather than an attached file. When creating an email there is a Contributor toolbar to upload an item and replace it with a link.





Insert SharePoint URL

You can share content from the cache with other users by using the Insert command. Insert Attachment formats the URL and inserts it at the top of the body of the email as if it had just been uploaded. Insert Text link inserts the URL at the current cursor location for inline URLs.



Attachment Rules

Contributor will warn or prevent emails from being sent if the total size of attachments exceeds a defined limit. If this limit is exceeded then some attachments may be removed or uploaded to SharePoint and replaced with their URLs. The current limits can be seen with the Rules command.





Share Content with other users

Copy SharePoint URL

You can share content with other users by right-clicking on an item and selecting “Copy SharePoint URL”, URLs for the selected item(s) are copied to your clipboard and can be pasted into many applications, files, or emails.

Drag-and-Drop

Alternatively, for users that do not have access to the SharePoint site it is possible to drag and drop files or folder structures from the Contributor Cached View into an email, Windows folder, or other suitable application.



The File Manager

Adding a Site to Contributor

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

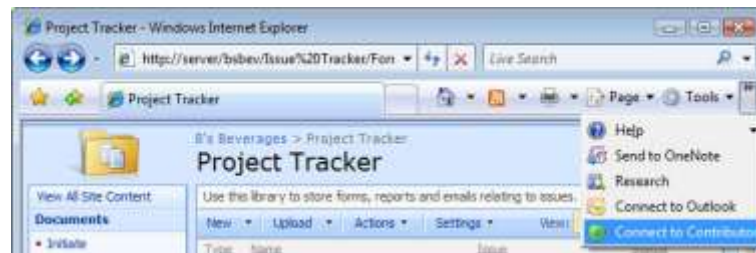
- Use the “Connect to Contributor” option in Internet Explorer
- File->New-> Download Site menu option
- Right Click the site drop-down menu and select “Download Site...”

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

Step 1: IE Toolbar button “Connect to Contributor”

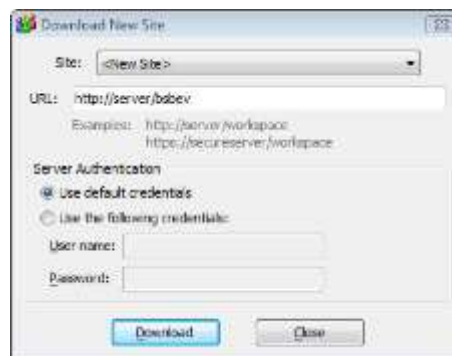
Navigate to a SharePoint site in Internet Explorer

Click the green “Connect to Contributor” icon on the toolbar



Step 2: Enter your credentials

Contributor will prompt you to enter your credentials for this site. You may use default windows credentials or enter other specified credentials.



Contributor will access the SharePoint web-services and request a list of Lists and Libraries you have access to.

Step 3: Choose the lists to sync

Once Contributor has received the list of Lists you are able to select which Lists you wish to synchronize. You may choose to:

- Synchronize all document libraries and lists.
- Synchronize specific lists (described below)

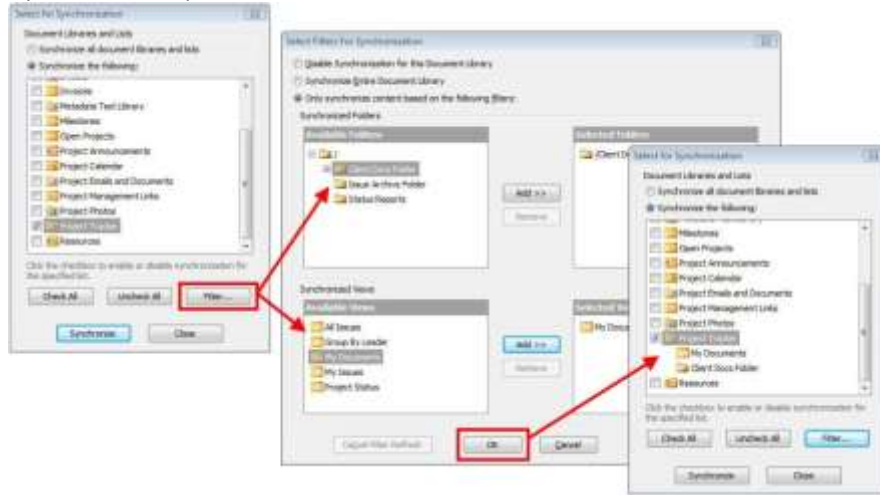
Select the lists you wish to Synchronize by ticking the box next to the list in the “Select for Synchronization” dialog.

Step 3.1: Apply Sync-Filters

You may apply a filter to each list to restrict cached content. Available filters are

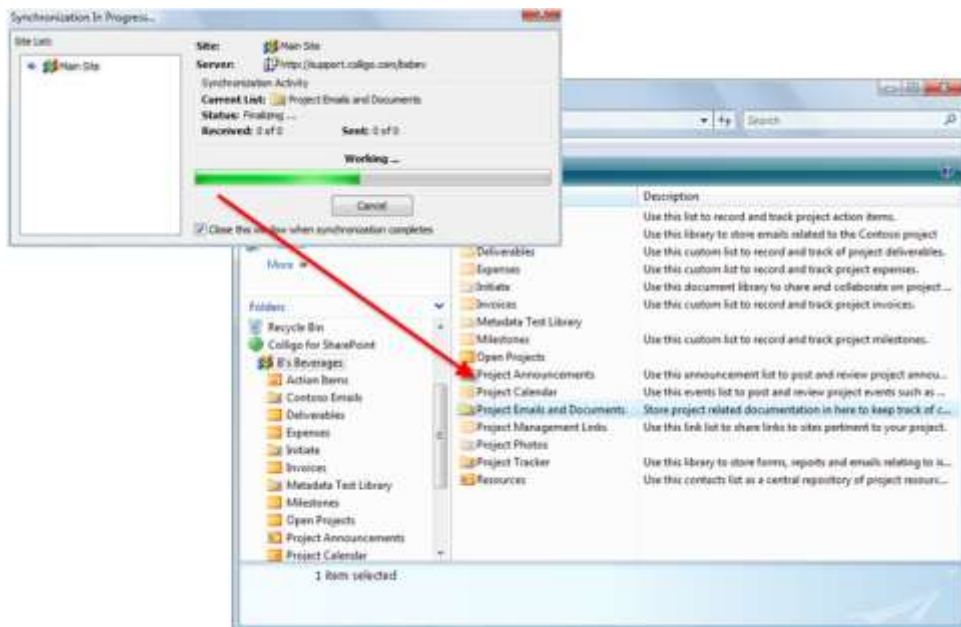
- All folders or specified folders. All subfolders will also be synchronized.
- A collection of Views. Contributor will synchronize all content selected in any View.

The “Select Filters for Synchronization” process is shown below:



Step 4: Synchronize content

Contributor synchronizes the selected content.



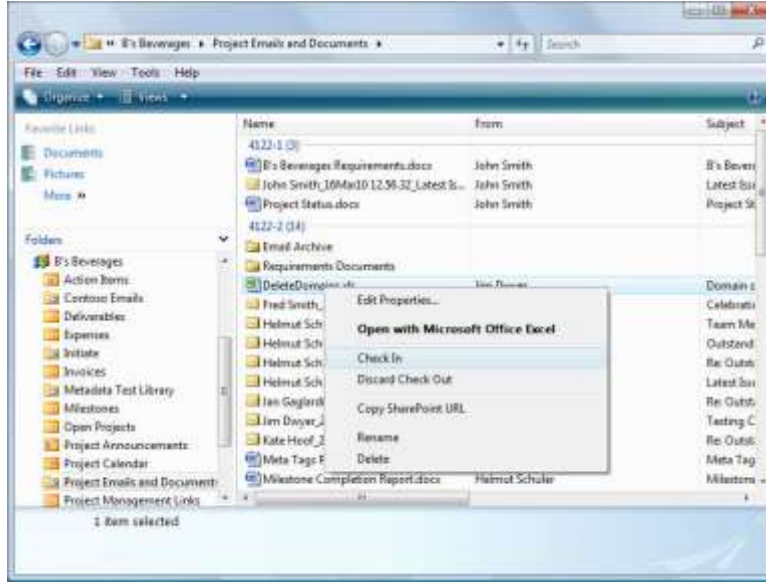
Once Synchronization is complete you are ready to start working with the cached content.

Editing content

Open a document by double-clicking on the item

Right-click on an item to:

- Edit the properties (metadata) of the item.
- Open/Edit a document
- Check Out; Check In; or Discard Check Out
- Rename content
- Delete content

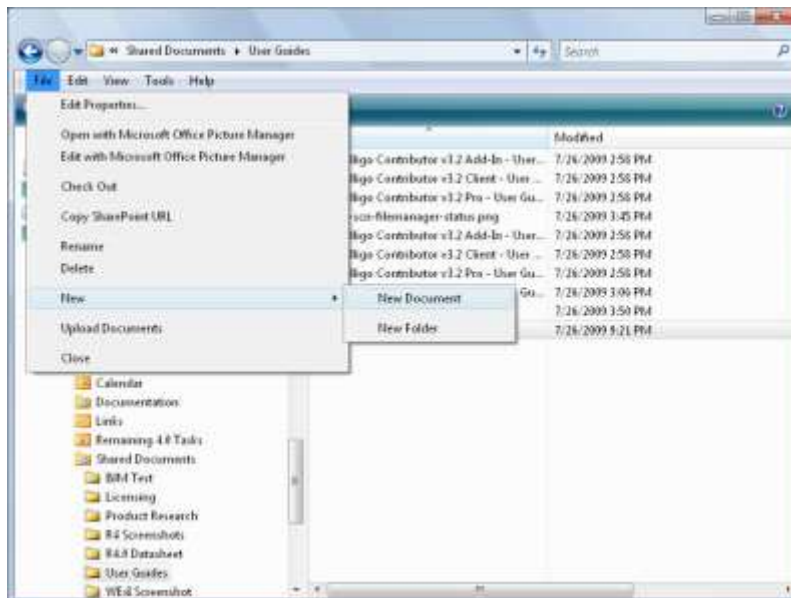


Creating new content

Using the New command

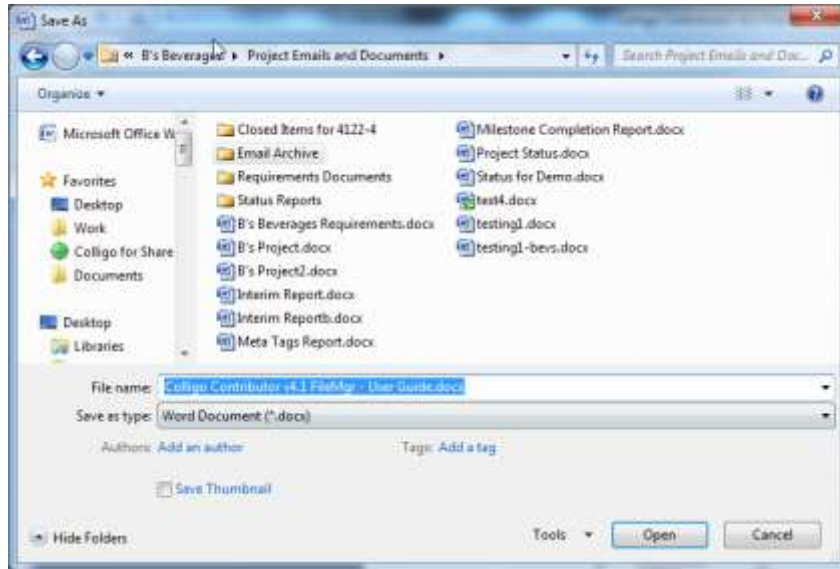
New content can be created by selecting the "New" option.

On SharePoint 2007 site content can be created based on content-type templates.



Using the File SaveAs command

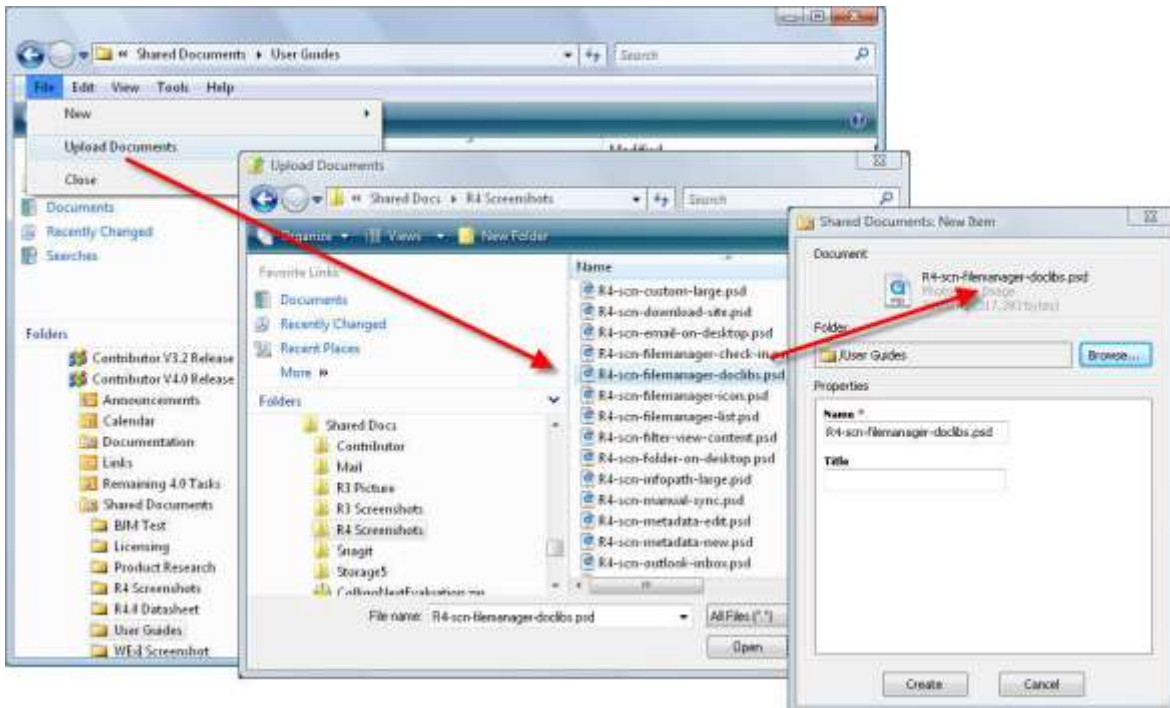
The Colligo for SharePoint root location appears in application Save As dialogs which use the standard Windows Explorer tree. Saving a file into the Contributor location creates a new file and a metadata prompt to request the content type and associated metadata data completes the creation process.



Uploading existing content

Using “Upload Documents” menu

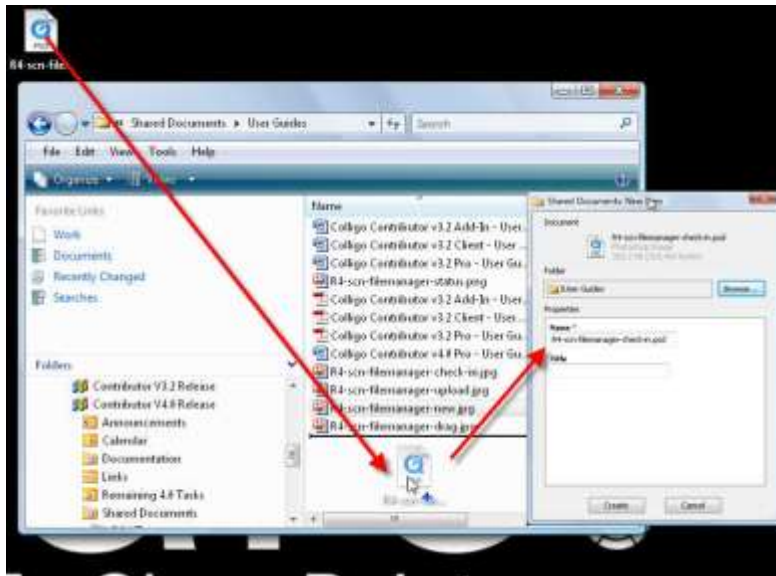
Existing content can be added to Contributor by selecting the “Upload” option: Contributor will prompt for metadata when the document is uploaded.





Upload content with drag-and-drop

Alternatively you can drag and drop content into Contributor from your desktop. Contributor will accept one or more files or complete folder structures for uploading. Contributor will prompt for metadata when the items are uploaded.



Copying existing content

Drag-and-drop

Existing content, files or folder structures, can be copied between SharePoint document libraries or folders by a drag and drop operation. A new copy of the files or folders is created in the destination location and Contributor will prompt for metadata. In cases where the metadata structure in the destination library is different from the source library Contributor will make a best effort to match and retain existing metadata values.

Share Content with other users

Copy SharePoint URL

You can share content with other users by right-clicking on an item and selecting “Copy SharePoint URL”, URLs for the selected item(s) are copied to your clipboard and can be pasted into many applications, files, or emails.

Drag-and-Drop

Alternatively, for users that do not have access to the SharePoint site it is possible to drag and drop files or folder structures from the Contributor File Manager into a Windows folder, a file, or as an attachment to an email.

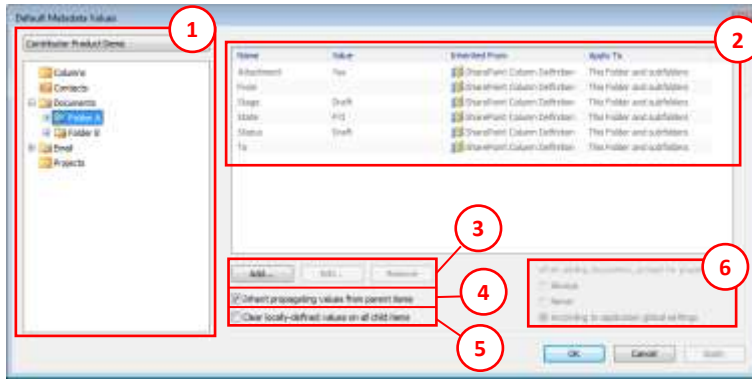


Default Metadata and Prompting Behavior

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.

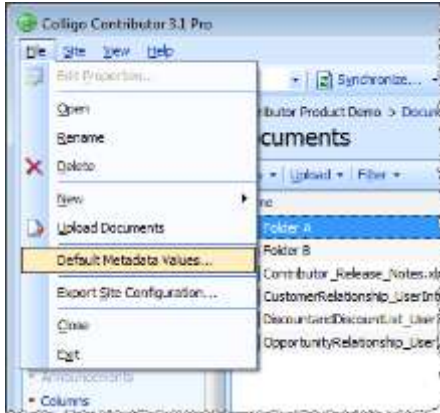


1. List Selector Panel
2. Default Value Settings
3. Add, Edit and Remove
4. Inherit propagating values from parent items
5. Clear locally-defined values on all child items
6. Prompting Behavior

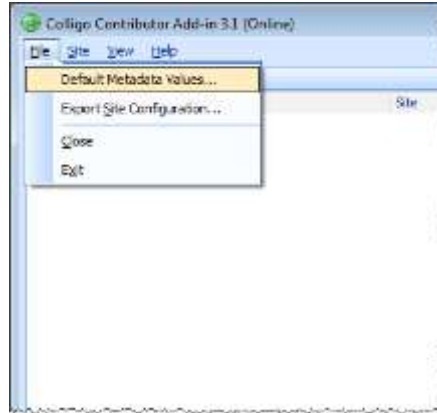
List Selector Panel	The List Selector allows you to change the List or Subfolder you wish to work with. <i>NOTE: The List selector is only visible if the dialog is access through the File menu.</i>	
Default Value Settings	Name	The Display Name of the SharePoint column
	Value	The default value to be applied.
	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 interface may be accessed by double-clicking the Contributor icon in the system tray.



Full Desktop Client



Runtime Engine

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

Navigation Breadcrumbs

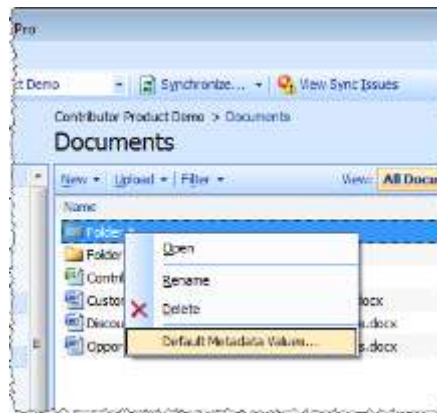
The Default Metadata dialog may be accessed by right-clicking on the navigational breadcrumbs.



** When accessed through the breadcrumbs, the Default Metadata dialog does not include the List Selector Panel; the dialog applies values to the selected list or subfolder.*

Context Menu

The Default Metadata dialog may be accessed by right-clicking on a list in the quick launch area or on a folder in the cached view.



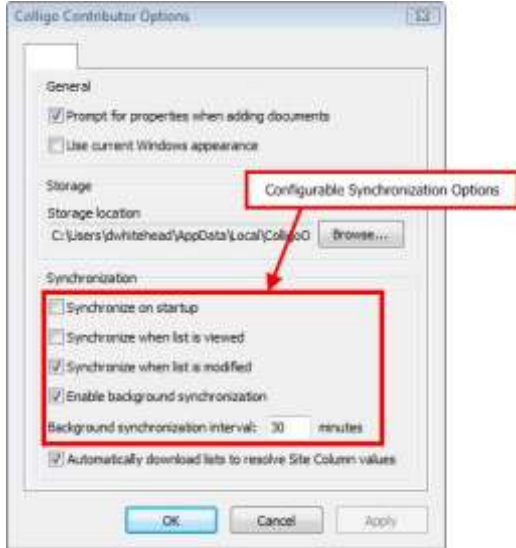
** When accessed through the context-sensitive menus, the Default Metadata dialog does not include the List Selector Panel; the dialog applies values to the selected list or subfolder.*



Synchronizing Content

Contributor offers different user-configurable synchronization processes to ensure data is kept synchronized with SharePoint. Synchronization runs silently in the background allowing you to continue working with your documents.

Automatic Synchronization processes



Synchronize on startup

Contributor synchronizes cached content when it starts

Synchronize when list is viewed

When you navigate to a list the content is synchronized

Synchronized when list is modified

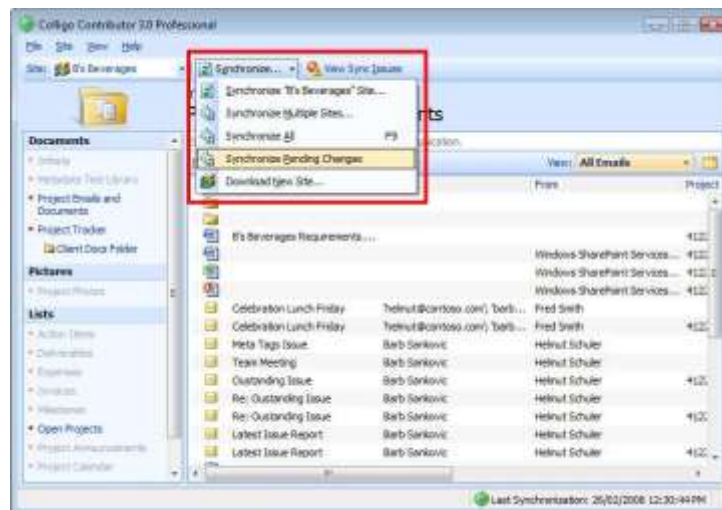
Modifications include changes to the document or metadata

Enable background synchronization

Contributor synchronizes content periodically. The default sync interval is 30 minutes.

Manual Synchronization processes

- **Synchronize Specific Site:** Synchronizes the current site
- **Synchronize Multiple Sites:** Allows selection of specific sites to synchronize
- **Synchronize All:** Synchronizes all sites defined in Contributor
- **Synchronize Pending Changes:** Synchronizes lists containing changed content



Full Synchronization

Several of the synchronization processes allow you to specify 'Full Synchronization'. When Contributor performs a full synchronization additional information is downloaded, this includes definitions for Sites, Lists, Views and Content-Types, etc, plus other site-content that may not be retrieved during other standard sync processes.



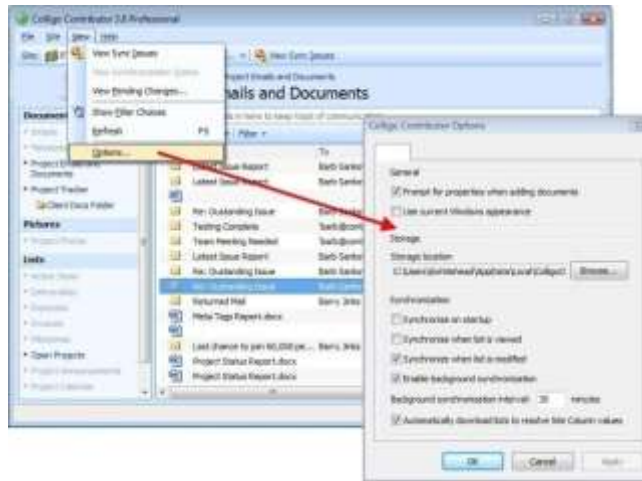
Pending Changes Synchronization

You may review content that has changed since the last synchronization by accessing the View->Pending Changes window. For each item with a pending change you can choose to discard the changes. Discarded changes will be reverted upon the next synchronization.



Configuration

Contributor provides easy access to the common configuration options:



For details regarding the Synchronization options please check the [Synchronizing Content](#) section.

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.

Standard Appearance



Windows Appearance



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.