

# Colligo Contributor Client 4.3

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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**.

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 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).

## TECHNICAL REQUIREMENTS

### 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

## INSTALLING COLLIGO CONTRIBUTOR

Colligo provides both an .exe installer and an .msi installer for Contributor.

There are different installer packages dependent on which version of Office you have installed:

- For 32-bit Office, use the x86 installer
- For 64-bit Office, use the x64 installer

### EXE Installer

This installer package is an executable file with the following key features:

- Supports interactive install only (does not support silent install)
- Automatically installs software prerequisites (downloaded from [www.colligo.com](http://www.colligo.com))
- Not customizable

### Interactive EXE Install

**NOTE:** Microsoft Outlook must be closed for the installation to be successful.

1. Double-click the installation file.
2. Prerequisites are downloaded and installed.
3. Enter your license key.

Colligo Contributor can be set to launch at Windows Start Up. This enables the background synchronization to start automatically.

### MSI Installer

The MSI installer package has the following key features:

- Supports silent and interactive installs
- Does not install prerequisites - these must be downloaded and pre-installed
- Customizable

### Interactive MSI Install

**NOTE:** Microsoft Outlook must be closed for the installation to be successful.

1. Ensure prerequisites are installed.
2. Double-click the installation file.
3. Enter your license key.

### Terminal Server Install

For information on installing in a Terminal Server environment see the Colligo Contributor Terminal Server User Guide.

### 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.

## THE DESKTOP CLIENT

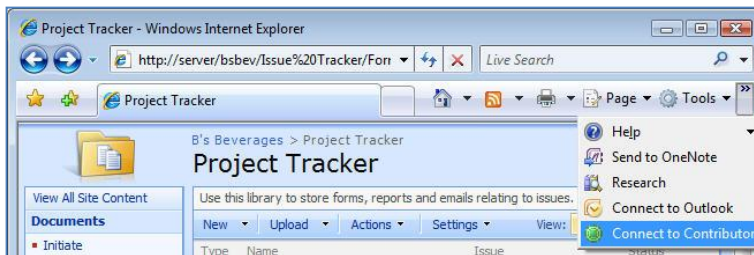
### Adding a Site to Contributor

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

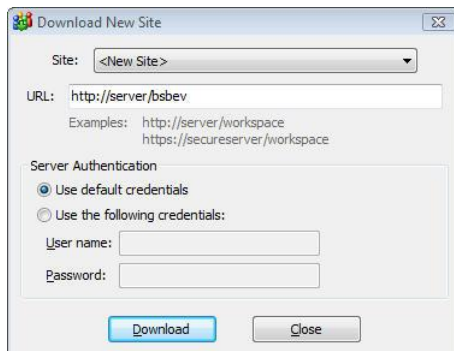
- Use the **Connect to Contributor** option in Internet Explorer
- **Site > Download Site** menu option
- Click the site selector drop-down and select **Download Site...**
- Drag-and-drop a URL from Internet Explorer into Contributor

### Using the Connect to Contributor Option

1. Navigate to a SharePoint site in Internet Explorer.
2. Click the green **Connect to Contributor** icon on the toolbar.



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



4. If the site you are connecting to is an Office365 site, a prompt for your Office365 credentials displays:



Contributor accesses the SharePoint web-services and requests a list of Lists and Libraries you have access to. Once Contributor has received the list, you are able to select which lists you want to synchronize.

### Synchronizing Lists

You may choose to:

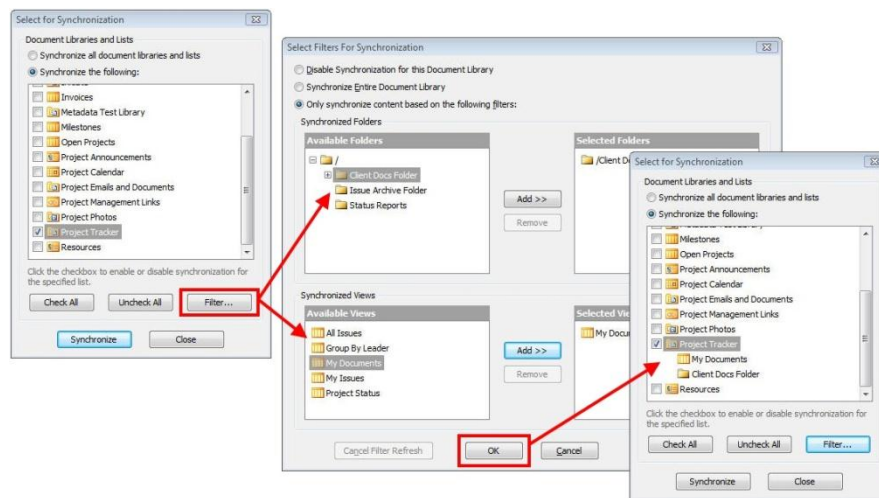
- Synchronize all document libraries and lists
- Synchronize specific lists (described below)

Select the lists you wish to Synchronize by checking the box next to the list in the **Select for Synchronization** dialog.

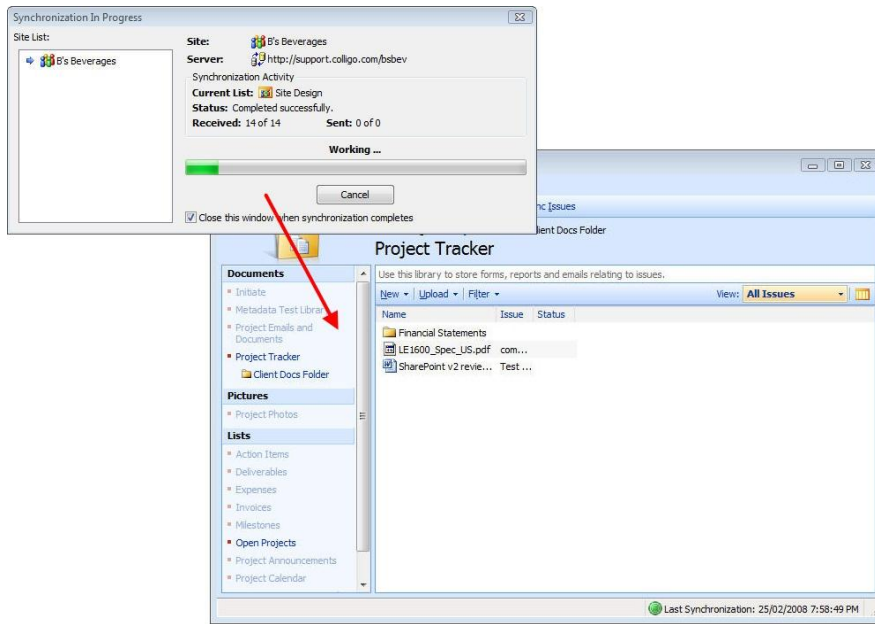
You may apply a filter to each list to restrict cached content. Available filters are:

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

The **Select Filters for Synchronization** process is shown below:



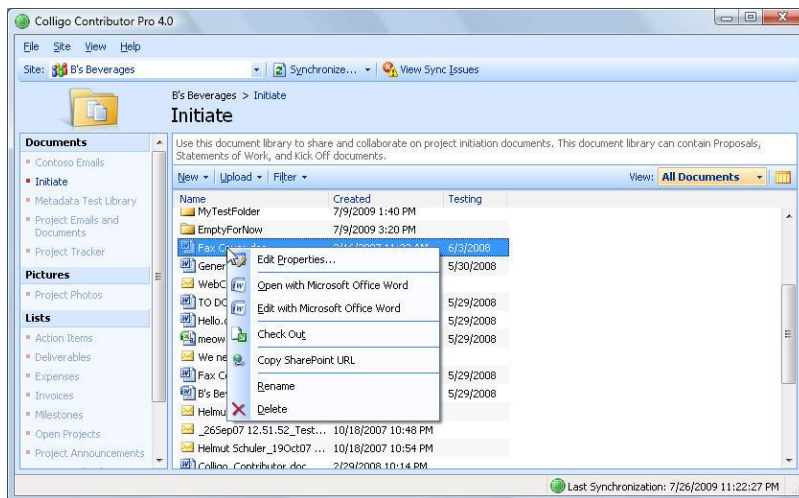
Contributor synchronizes the selected content.



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

## Editing content

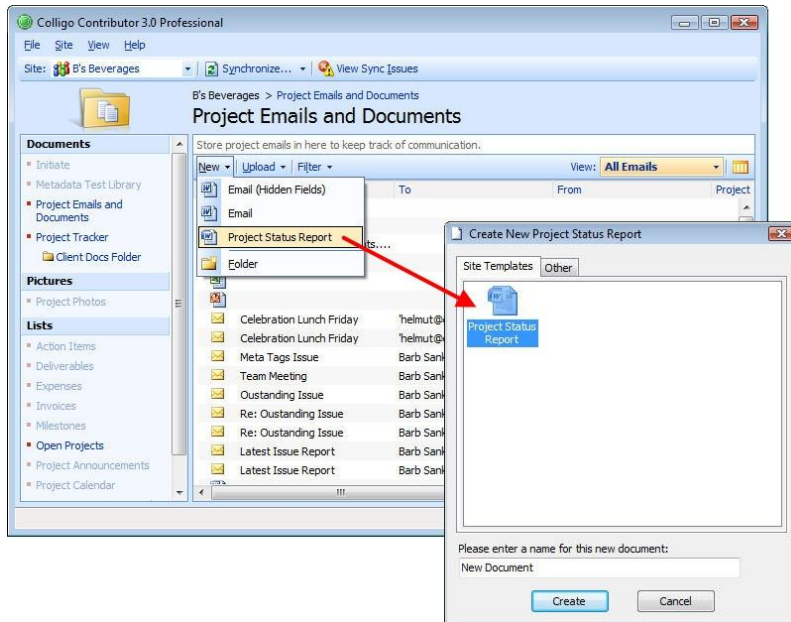
1. Open a document by double-clicking on the item.
2. Right-click on an item to:
  - Edit the properties (metadata) of the item
  - Open/Edit a document
  - Check Out, Check In, or Discard Check Out
  - Rename content
  - Delete content



## Creating New Content

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

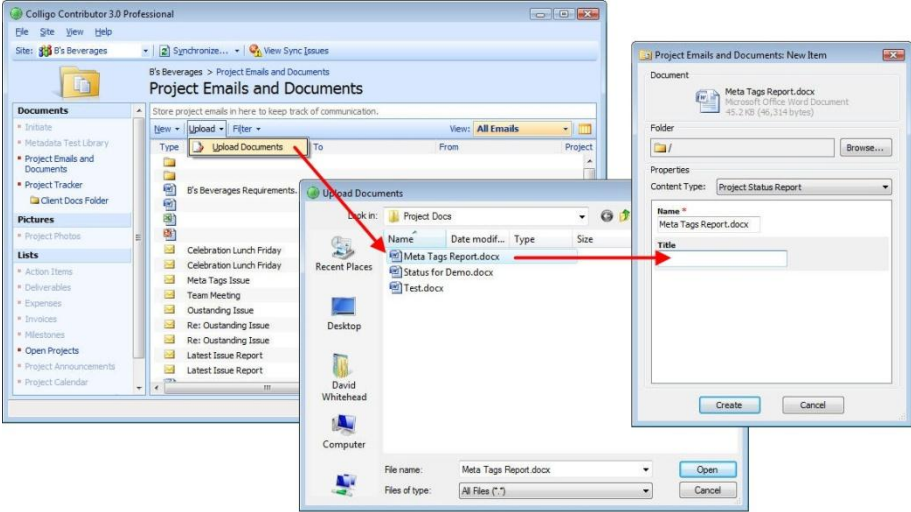
On SharePoint 2007, site content can be created based on content type templates.



### Uploading Existing Content

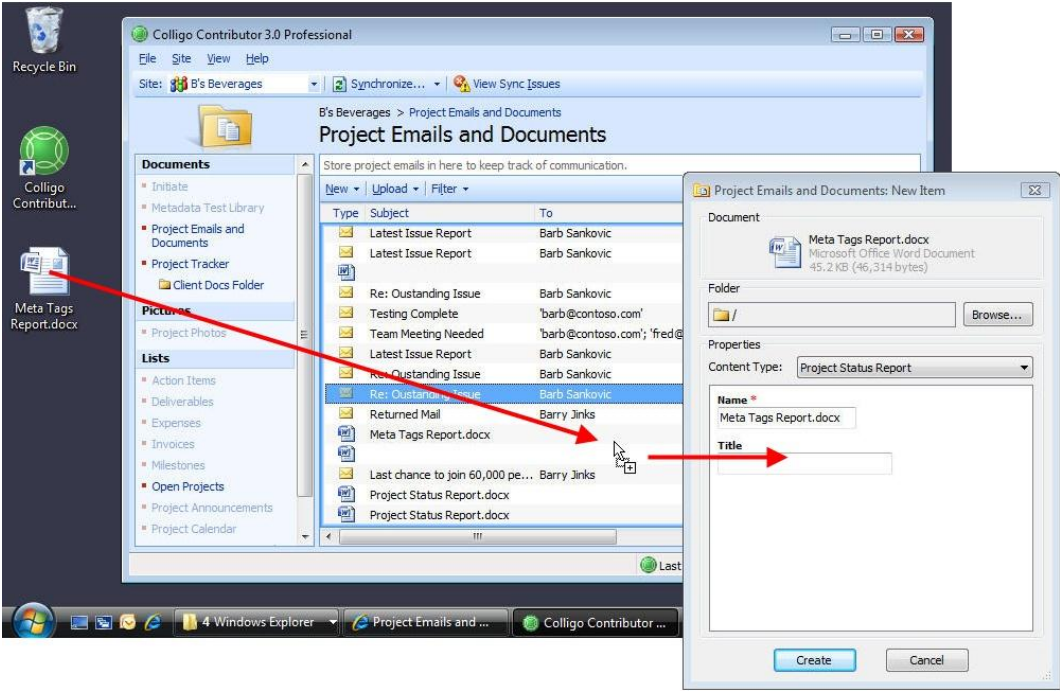
#### Using Upload Documents Menu

Existing content can be added to Contributor by selecting the **Upload** option. Contributor prompts for metadata when the document is uploaded.



#### Uploading Content with Drag-and-Drop

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



## Copying Existing Content

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 prompts for metadata. In cases where the metadata structure in the destination library is different from the source library, Contributor makes a best effort to match and retain existing metadata values.

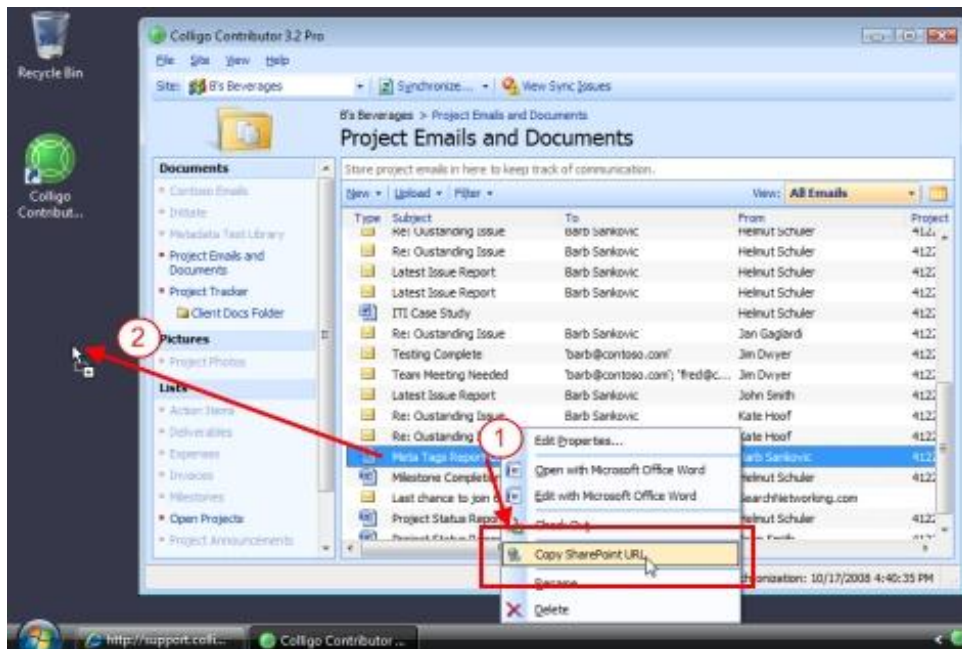
## Sharing Content with Other Users

### Copy SharePoint URL

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

### Dragging-and-Dropping

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.

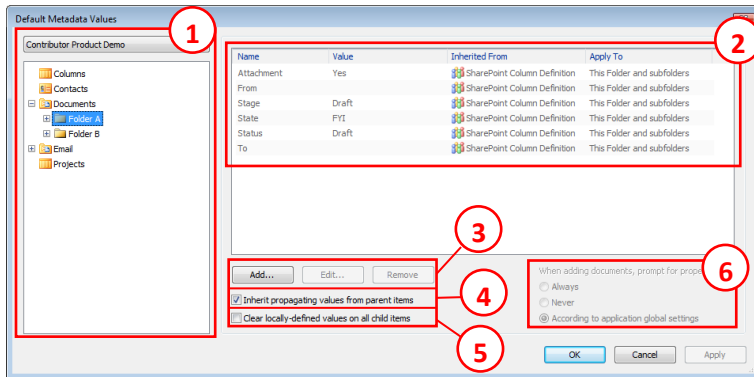


## DEFAULT METADATA AND PROMPTING BEHAVIOR

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

### Introducing the Metadata Dialog

A sample of the **Default Metadata Values** 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

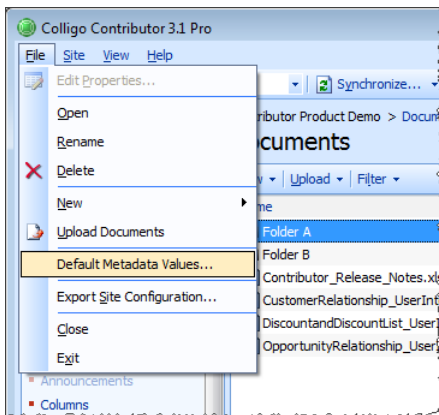
List Selector Panel	The List Selector allows you to change the List or Subfolder you wish to work with. <b>NOTE:</b> The List selector is only visible if the dialog is access through the File menu.	
Default Value Settings	Name	The Display Name of the SharePoint column
	Value	The default value to be applied.
	Inherited From	Indicates where Contributor receives this value from. The 'Inherit From' column may take the following values: <ul style="list-style-type: none"> <li>• SharePoint Column definition</li> <li>• &lt;not inherited&gt;</li> </ul> <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 <b>Apply To</b> folder may take the following values: <ul style="list-style-type: none"> <li>• This Folder and subfolders</li> <li>• This Folder only</li> </ul>
Add, Edit and Remove	These 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.	

<p>Prompting Behavior</p>	<p>Modify the prompting behavior. The options are:</p> <ul style="list-style-type: none"> <li>• Always: The metadata prompt will be displayed when an item is added</li> <li>• Never: The metadata prompt will <i>*not*</i> be displayed when an item is added</li> <li>• According to application global settings: Prompting behavior is as defined in the View-&gt; Options dialog</li> </ul> <p>Child-items that are configured for inheritance will inherit this setting.</p>
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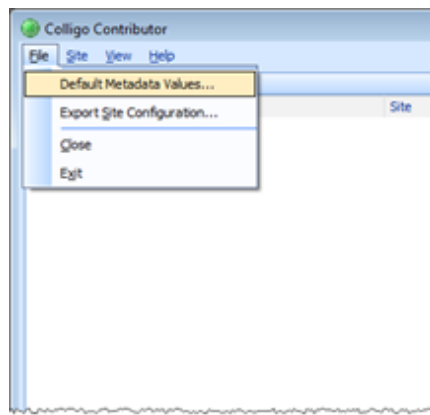
## Accessing the Dialog

### 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

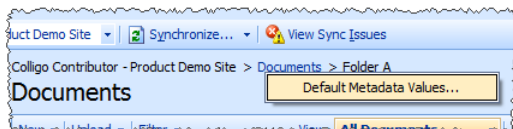


Runtime Engine

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

### Navigation Breadcrumbs

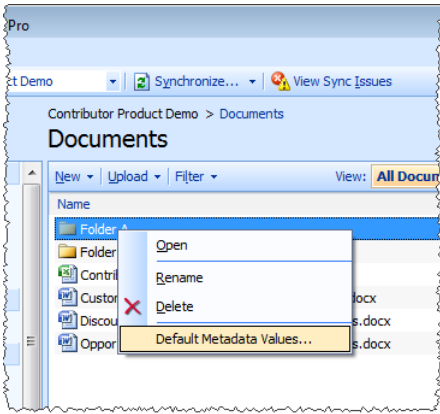
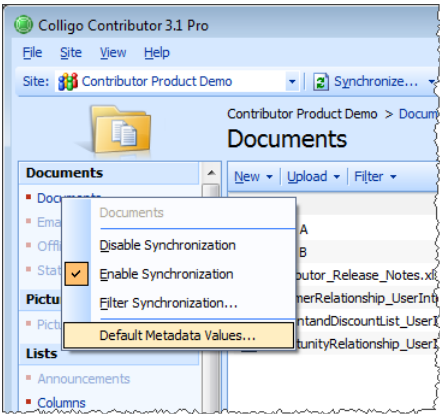
The Default Metadata dialog may be accessed by right-clicking on the navigational breadcrumbs.



*\* 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 Menus**

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.

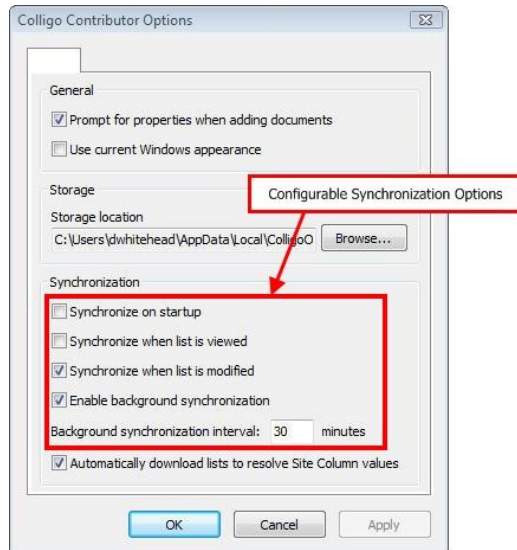


*\* When accessed through the context-sensitive menu, the Default Metadata dialog does not include the List Selector Panel; the dialog applies values to the selected list or subfolder.*

## 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

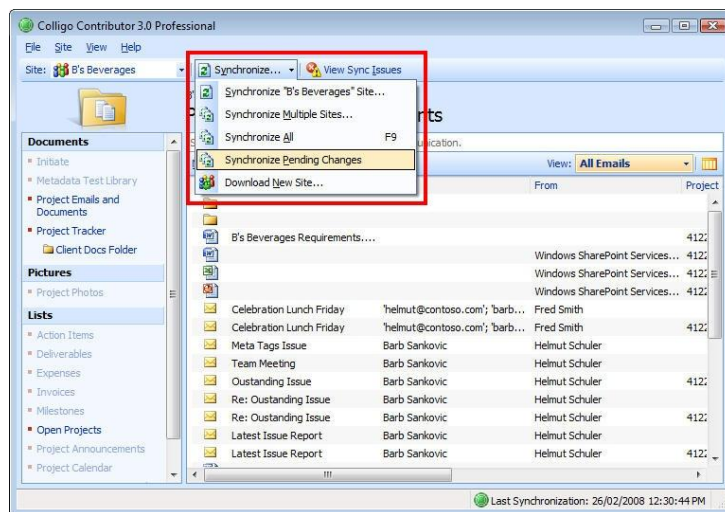
**Synchronize when list is viewed:** When you navigate to a list the content is synchronized

**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

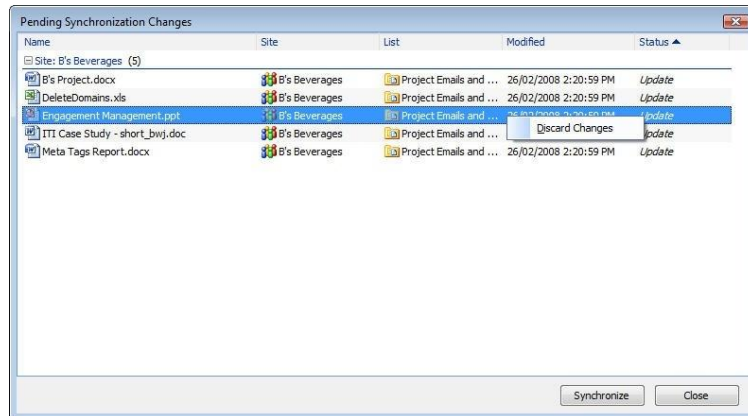


## Full Synchronization

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.

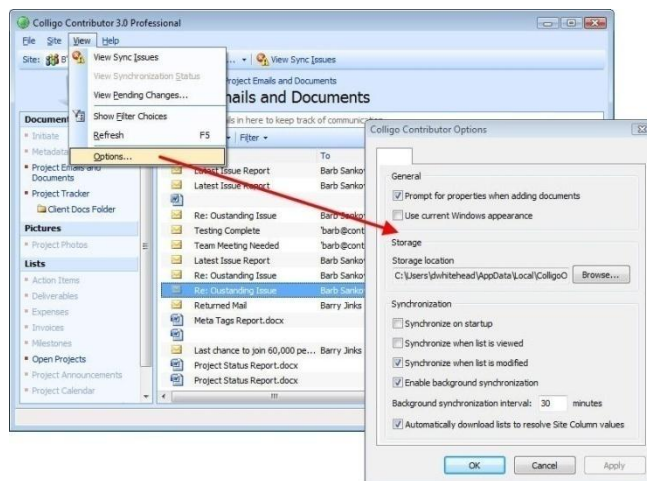
## Pending Changes Synchronization

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 are reverted upon the next synchronization.



## CONFIGURATION

Contributor provides easy access to common configuration options:



For details regarding the Synchronization options, please see Synchronizing Content.

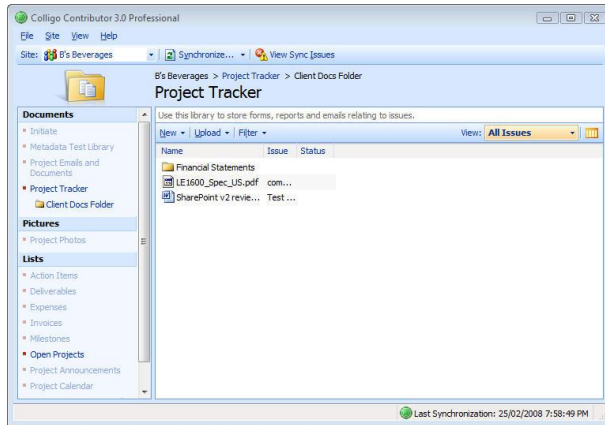
## Prompt for Properties when Adding Documents

By default Contributor prompts for metadata when content is added. You can disable this prompt. If the prompt is disabled content is uploaded to SharePoint with default metadata.

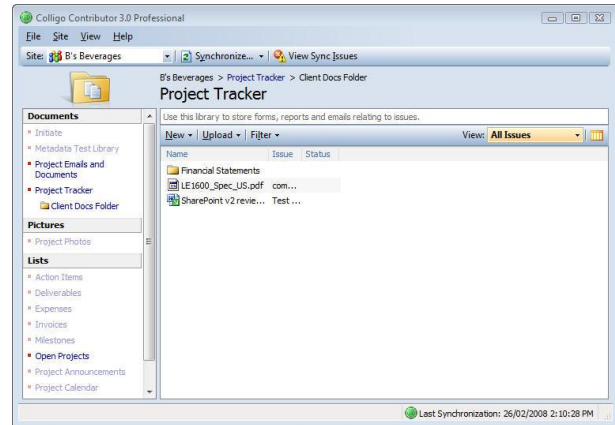
## Use Current Windows Appearance

You can switch Contributor's user interface between a Windows application look-and-feel and a WSSv3 style look-and-feel. With the Windows appearance Contributor adopts the underlying Windows color scheme.

Standard Appearance



Windows Appearance



## Storage location

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

## Automatically Downloading Lists to Resolve Site Column Values

Contributor ensures that data for Lookup columns is also synchronized.