

Colligo Contributor File Manager 4.3

User Guide



CONTENTS

Introduction.....2
Technical Requirements3
Systems Supported.....3
Application Prerequisites3
Outlook Add-in Prerequisites3
Installing Colligo Contributor4
EXE Installer.....4
Interactive EXE Install.....4
MSI Installer4
Interactive MSI Install.....4
Terminal Server Install4
Concurrent Version Installations.....4
Version Reversion/Downgrading4
File Manager5
Adding a Site to Contributor5
Using the Connect to Contributor Option5
Synchronizing Lists6
Editing Content.....7
Creating New Content8
Using the File SaveAs Command.....8
Uploading Existing Content9
Uploading Content with Drag-and-Drop.....9
Copying Existing Content10
Sharing Content with Other Users10
Copying a SharePoint URL.....10
Drag-and-Drop, Copy-and-Paste.....10
Default Metadata and Prompting Behavior11
Introducing the Metadata Dialog.....11
Accessing the Dialog.....12
File Menu12
Context Menus.....13
Synchronizing Content.....13
Automatic Synchronization Processes13
Manual Synchronization Processes14
Full Synchronization.....14
Pending Changes Synchronization14
Configuration15
Prompt for Properties when Adding Documents15
Storage Location.....15
Automatically Downloading Lists to Resolve Site Column Values.....15

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://www.colligo.com/support/>.

Please send questions and feedback to 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)
- 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.

FILE MANAGER

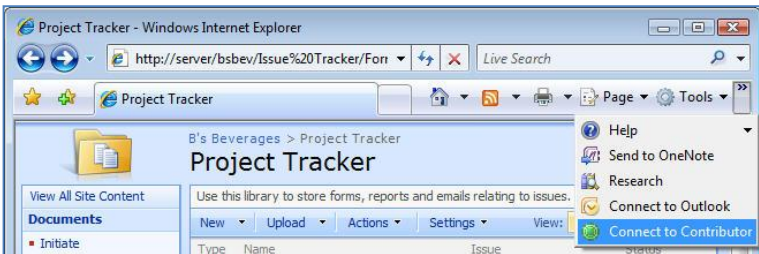
Adding a Site to Contributor

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

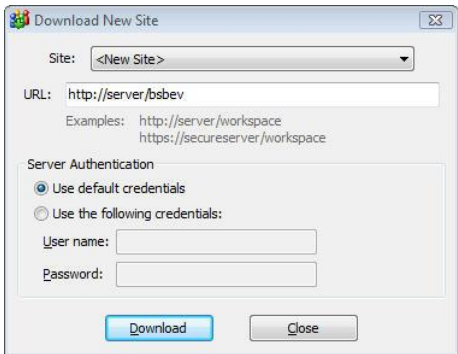
- Use the **Connect to Contributor** option in Internet Explorer
- **File > New > Download Site** menu option
- Right-click the **Site** drop-down menu and select **Download Site...**

Using the Connect to Contributor Option

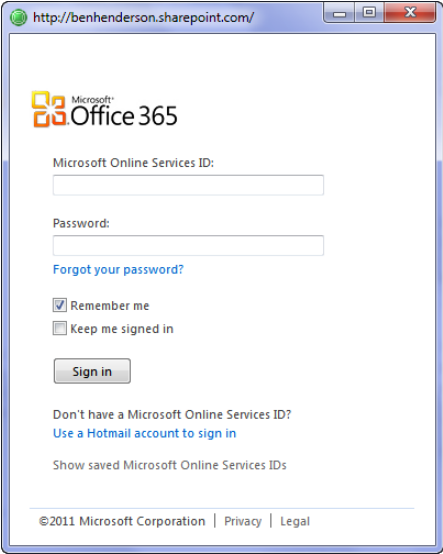
1. Navigate to a SharePoint site in Internet Explorer.
2. Click the green **Connect to Contributor** icon on the toolbar.



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:

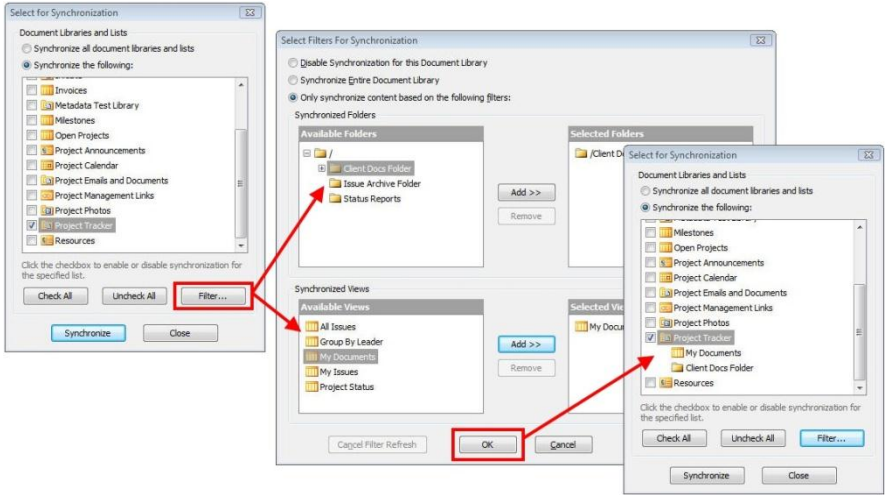
- Synchronize all document libraries and lists
- Synchronize specific lists (described below)

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

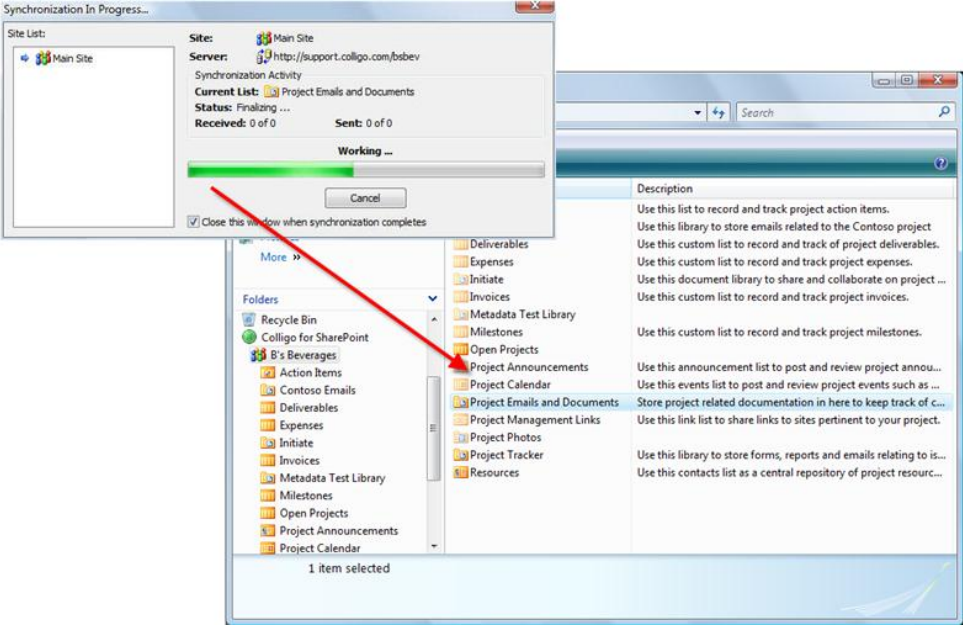
You may apply a filter to each list to restrict cached content. Available filters are:

- 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:



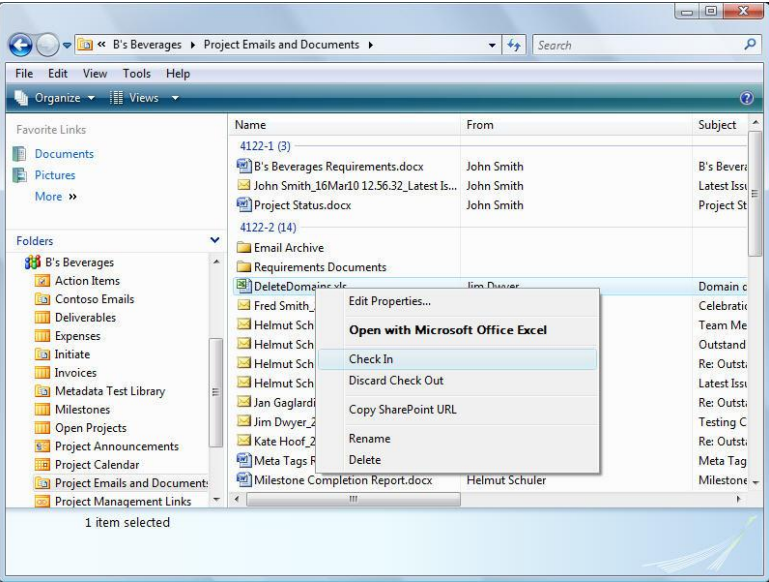
Contributor synchronizes the selected content.



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

Editing Content

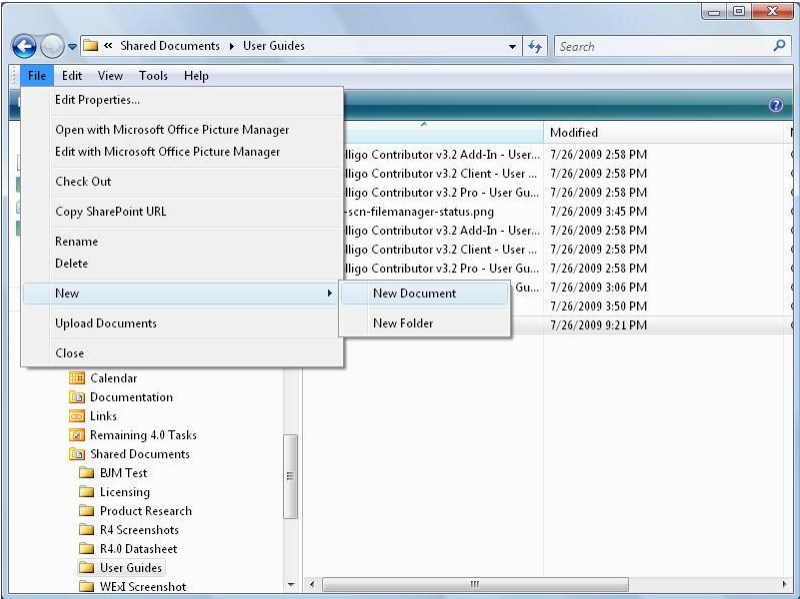
1. Open a document by double-clicking on the item.
2. Right-click on an item to:
 - Edit the properties (metadata) of the item
 - Open/Edit a document
 - Check Out, Check In, or Discard Check Out
 - Rename content
 - Delete content



Creating New Content

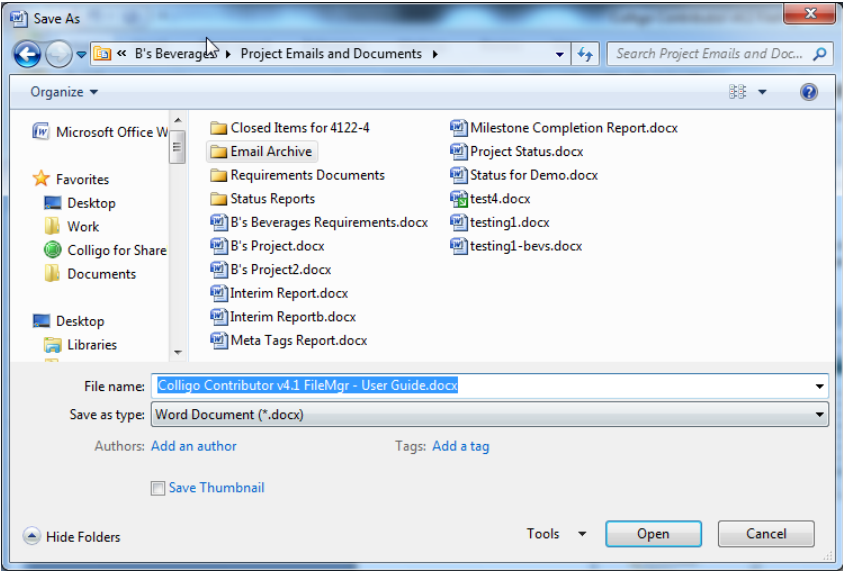
New content can be created by selecting the **New** option.

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



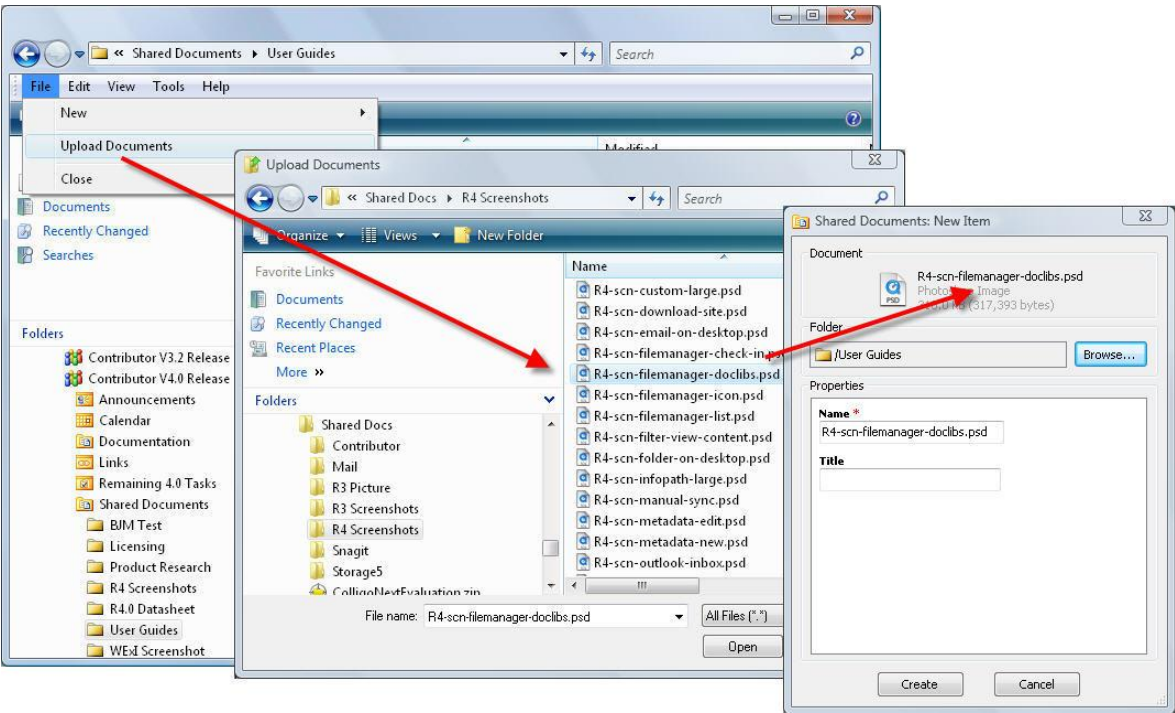
Using the File SaveAs Command

The **Colligo for SharePoint** root location appears in **Save As** dialogs that 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.



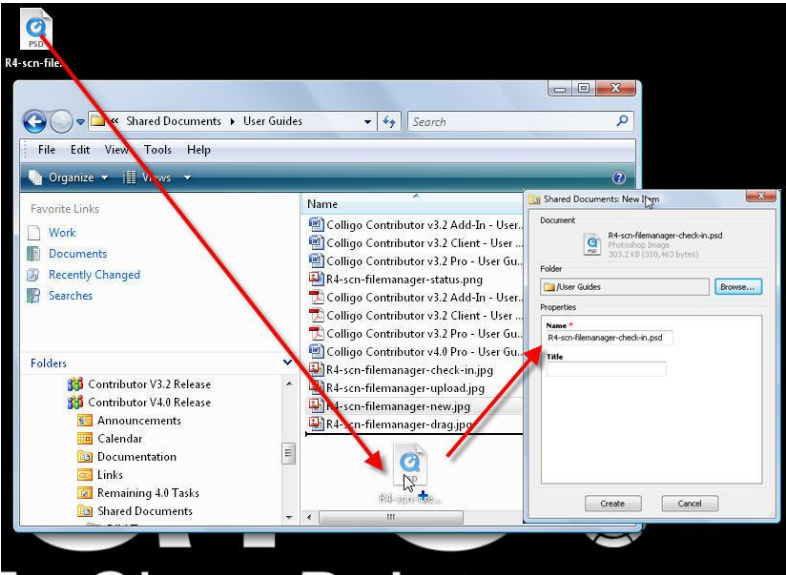
Uploading Existing Content

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 either a drag-and-drop or copy-and-paste operation. Copy-and-paste can be accessed through standard Windows operations, such as right-click or Ctrl-C/Ctrl-V keyboard shortcuts.

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

Copying a 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 items are copied to your clipboard and can be pasted into applications, files, or emails.

Drag-and-Drop, Copy-and-Paste

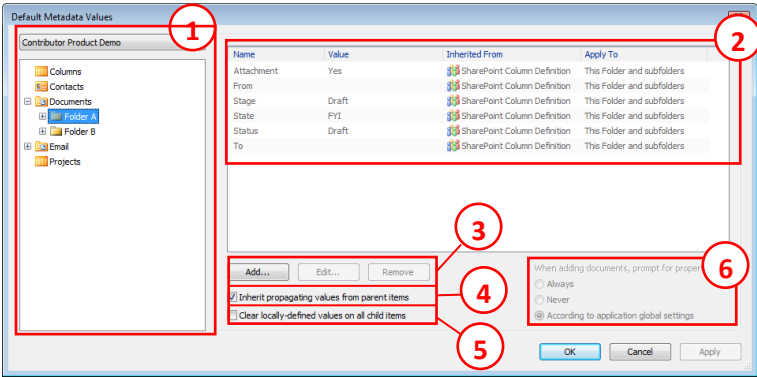
Alternatively, for users that do not have access to the SharePoint site, it is possible to drag-and-drop or copy-and-paste files or folder structures from the Contributor File Manager into a Windows folder, a file, or as an attachment to an email.

DEFAULT METADATA AND PROMPTING BEHAVIOR

Contributor allows you to specify default values for metadata. Default values can be set at a document library, or subfolder 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

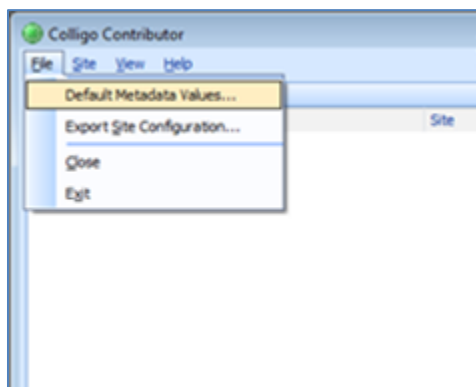
List Selector Panel	The List Selector allows you to change the List or Subfolder you wish to work with. NOTE: The List selector is only visible if the dialog is access through the File menu.	
Default Value Settings	Name	The Display Name of the SharePoint column
	Value	The default value to be applied.
	Inherited From	Indicates where Contributor receives this value from. The 'Inherit From' column may take the following values: <ul style="list-style-type: none"> • 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	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.
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 depending on the elements of Contributor deployed. The Contributor Control Panel interface may be accessed by double-clicking the Contributor icon in the system tray.

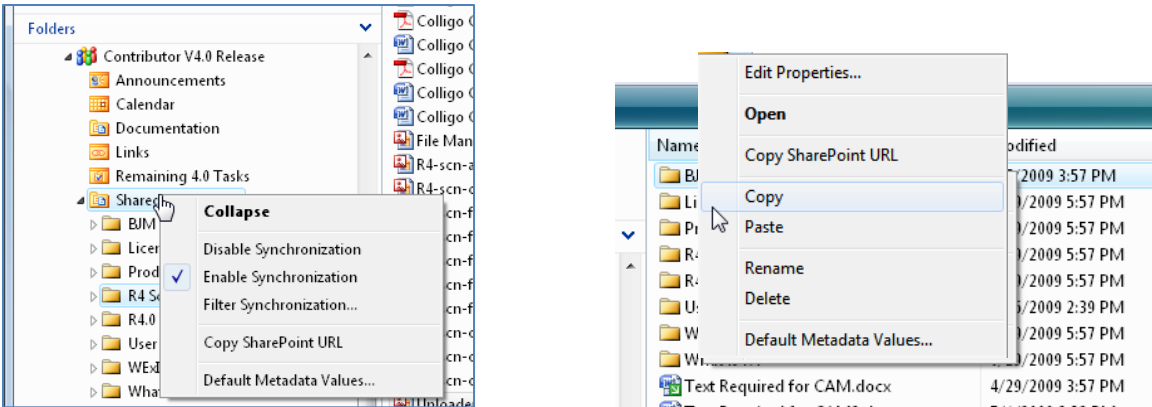


Control panel

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

Context Menus

You can access the default metadata dialog by right-clicking on a list in the folder area or on a folder in the cached view.

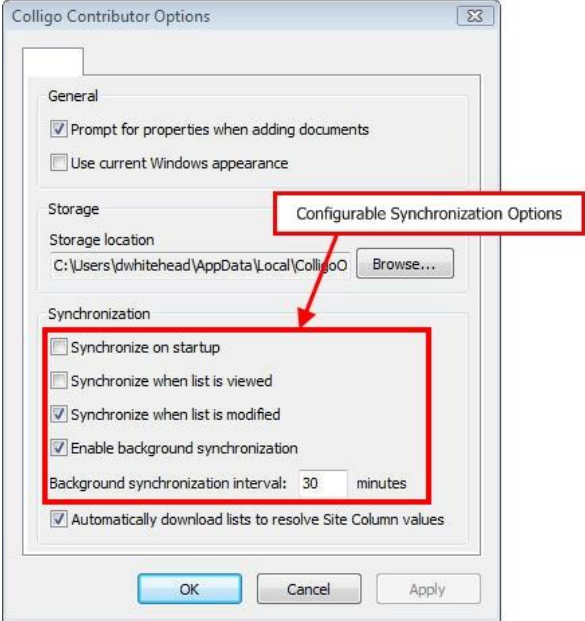


* When accessed through the context-sensitive menus, the Default Metadata dialog does not include the List Selector Panel; the dialog applies values to the selected list or subfolder.

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

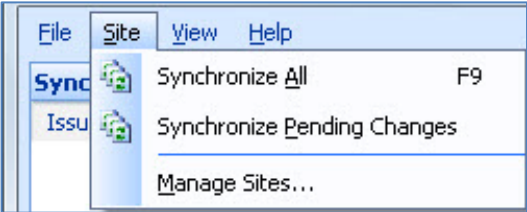
Synchronize when list is viewed: When you navigate to a list the content is synchronized

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 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

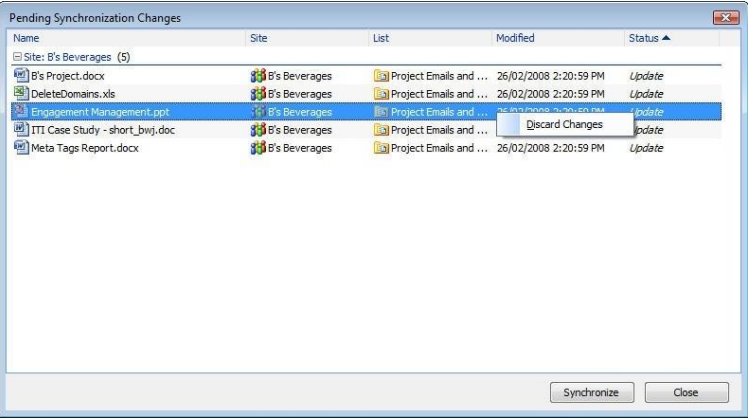


Full Synchronization

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.

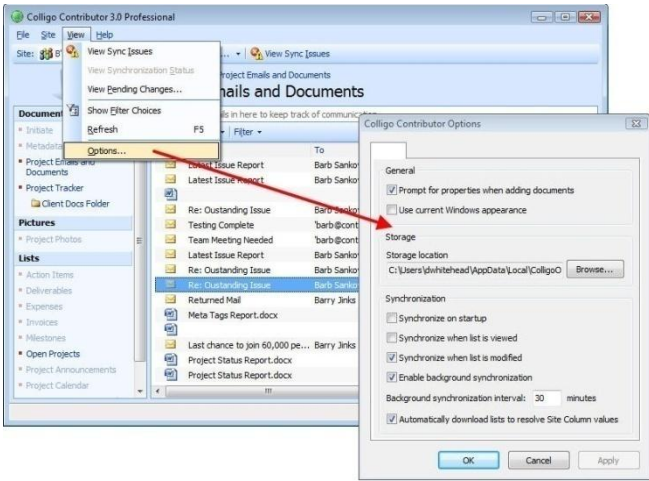
Pending Changes Synchronization

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 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 prompt for metadata when content is added. You can disable the prompt. If the prompt is disabled, content is uploaded to SharePoint with default metadata.

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.