

Colligo Contributor Uploader 4.3

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 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.

OUTLOOK UPLOADER

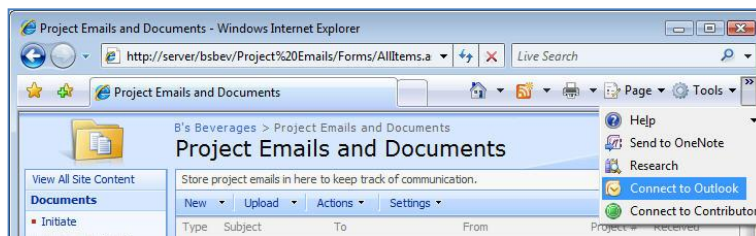
Adding a Site to Uploader

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

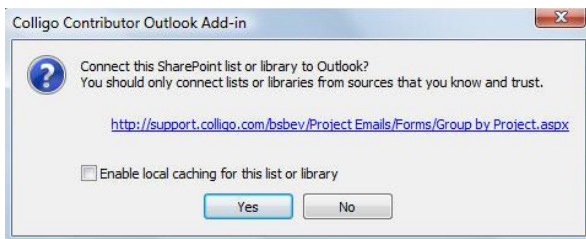
- Use the **Connect to Contributor** option in Internet Explorer
- **Site > Download Site** menu option
- Click the site selector drop-down and select **Download Site...**
- Drag-and-drop a URL from Internet Explorer Into Contributor

Internet Explorer Toolbar Connect to Outlook Button

1. Navigate to a SharePoint List or Library in Internet Explorer.
2. Click the yellow **Connect to Outlook** icon on the toolbar.



Outlook launches, if it is not already running, and displays a dialog asking for confirmation that you wish to connect the library to Outlook.



Outlook Uploader does not support caching. However, for an explanation of the difference between Online and Cached, see [Cached vs. Online Modes](#).

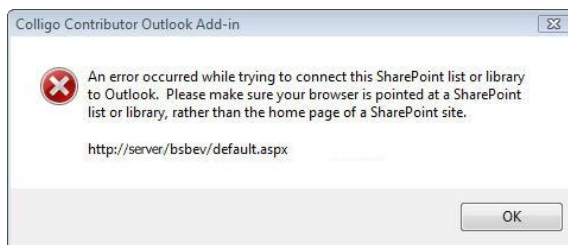
You may be prompted for credentials to connect to the SharePoint site. Use your default Windows credentials, or supply other specific credentials.



If the site you are connecting to is an Office365 site, you are prompted for your Office365 credentials as follows:



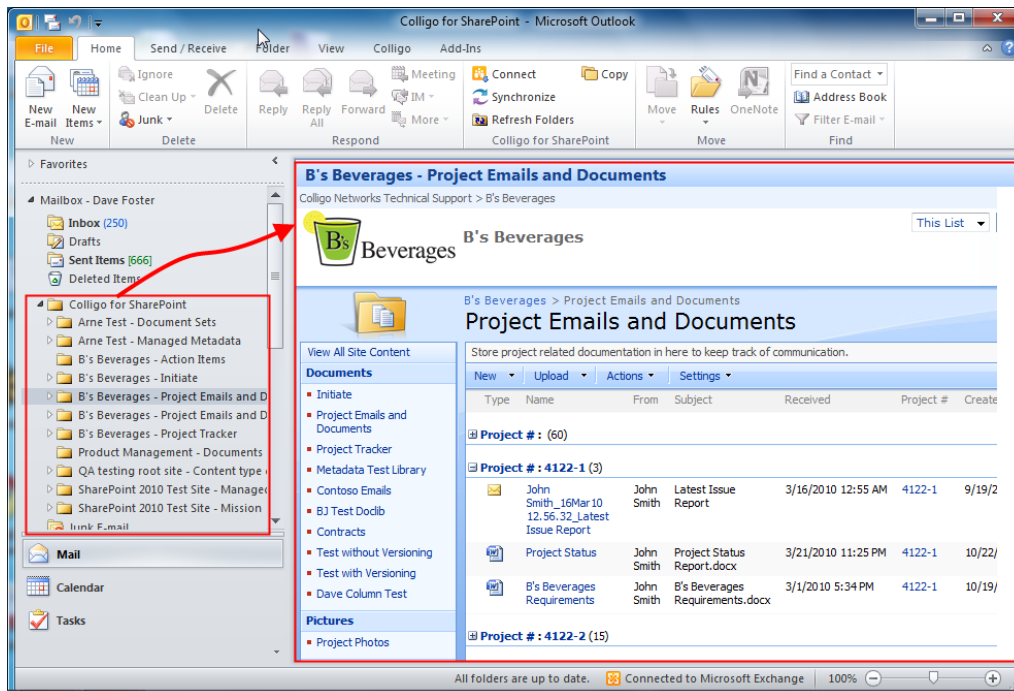
If the **Connect to Outlook** process starts on a page that does not relate to a SharePoint List, the following message displays:



3. Click **OK**, then navigate to a list in Internet Explorer and click **Connect to Outlook** again.

Once Contributor has finished downloading the List definitions, the folders display in Outlook. Contributor builds out a tree for the subfolders of the selected document library.

The Online view displays as follows:



Cached vs. Online Modes

Contributor Uploader only supports the Online mode; it does not support cached.

Online Mode

Key functionality of Contributor Uploader operating in Online Mode is:

- Does not maintain a cache of data
- Uploads 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)

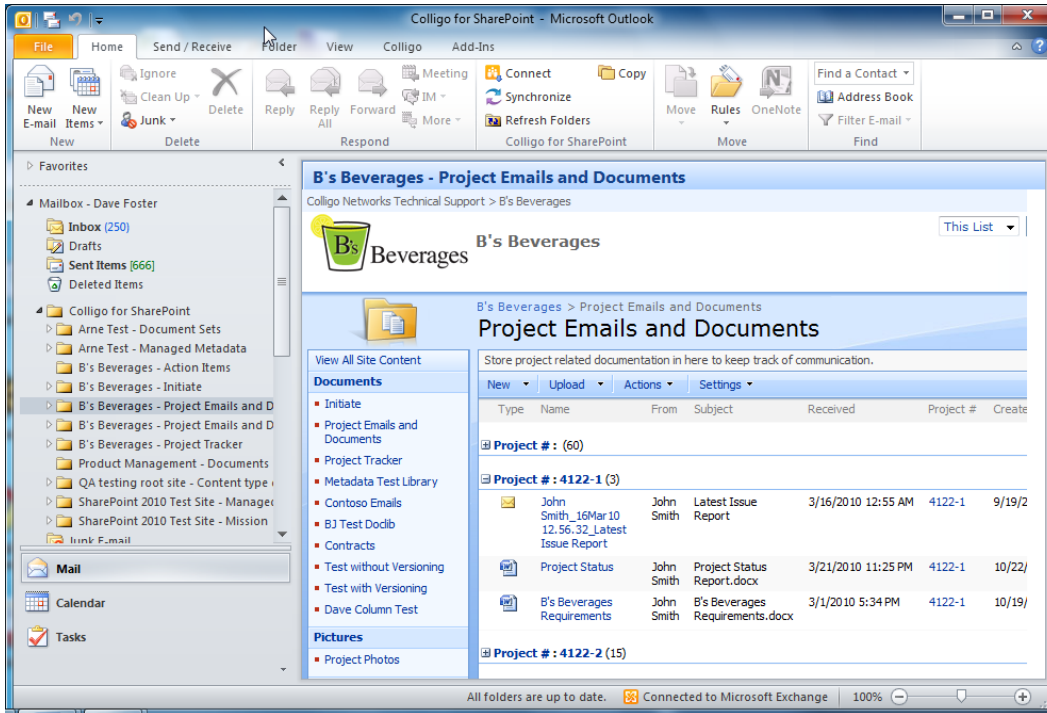
Cached Mode

Key additional functionality of Contributor operating in Cached Mode is:

- Content is cached providing offline access
- Local access and edit of existing SharePoint content including metadata.

INTEGRATED BROWSER INTERFACE

If you click on an Outlook folder under the **Colligo for SharePoint** area, a browser displays the selected SharePoint location.

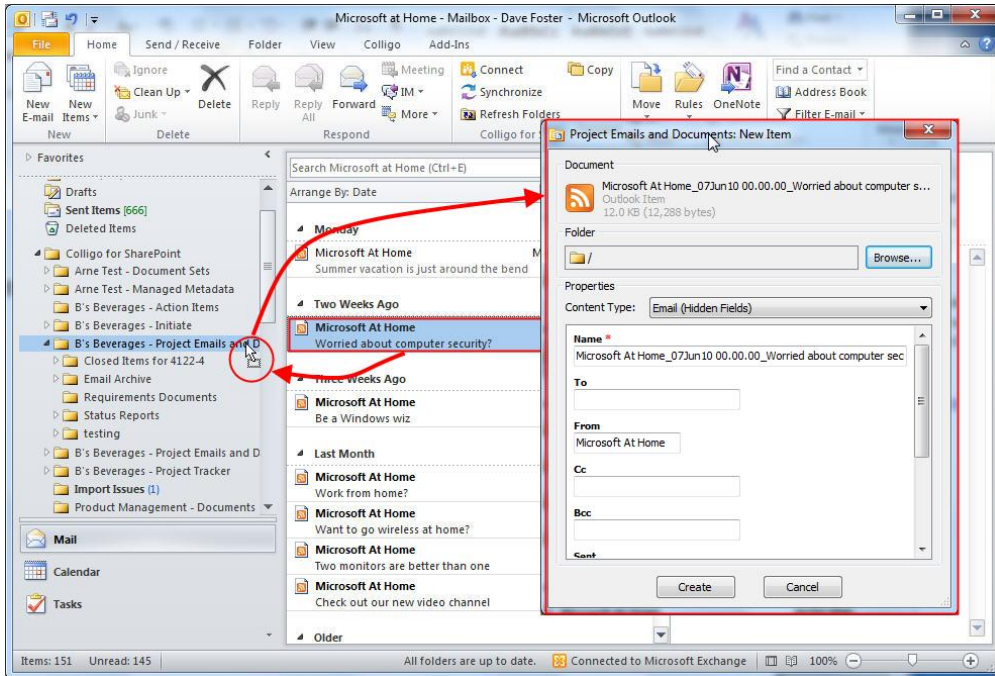


UPLOADING CONTENT

Using Drag-and-Drop

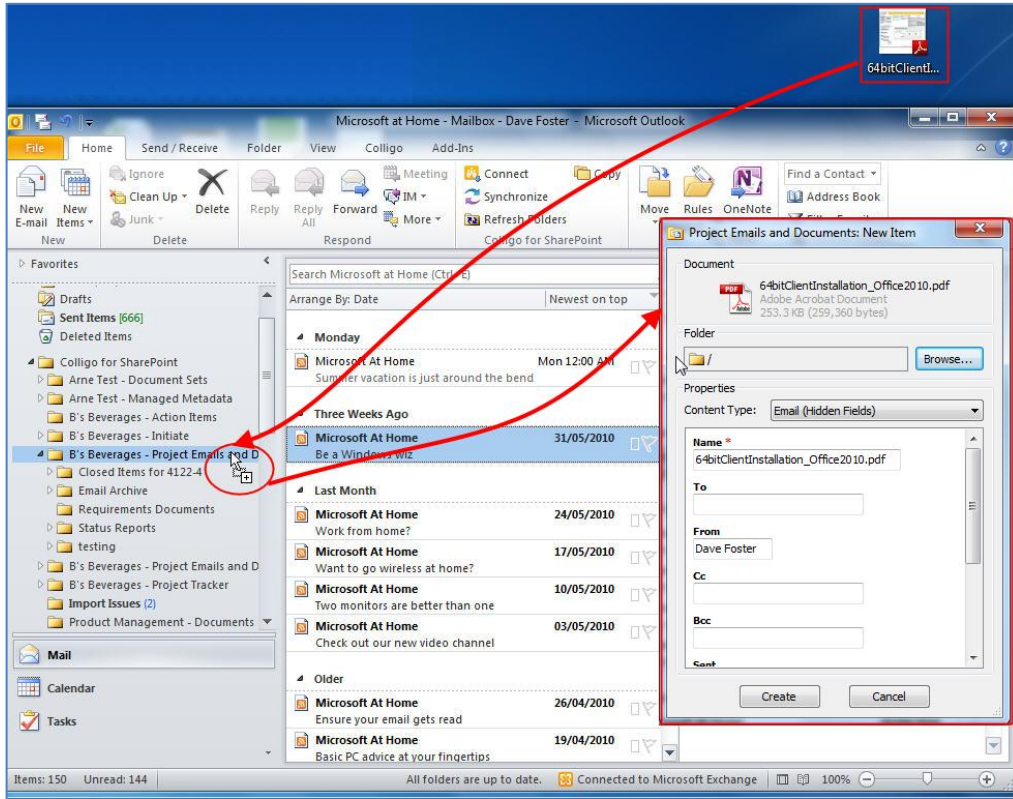
You can upload emails to SharePoint by dragging-and-dropping directly from your inbox into the Outlook folder tree. Contributor automatically extracts email metadata (To, From, Sent, Subject, etc.) to similarly named SharePoint columns.

The .msg format maintains fidelity of the message, including attachments. A unique SharePoint file name is generated based on Sender, Sent, and, Subject.



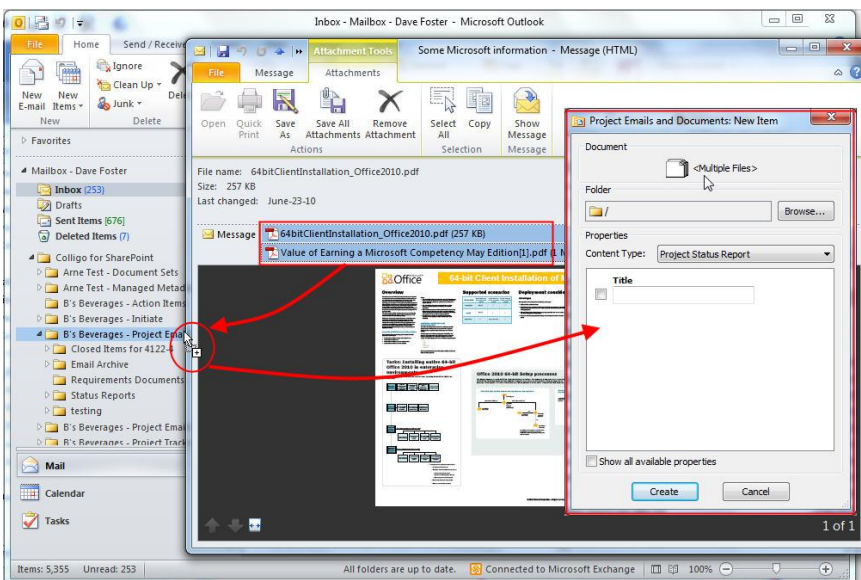
Dragging from Desktop to Outlook

You can upload files to SharePoint by dragging-and-dropping directly from your Desktop (or My Computer) into the Outlook folder tree. Contributor prompts for metadata, and uploads the file to the selected library.



Dragging Email Attachments into Outlook

You can upload attachments to SharePoint by dragging-and-dropping directly from an email into the Outlook folder tree. Contributor prompts for metadata and uploads the file to the selected library.



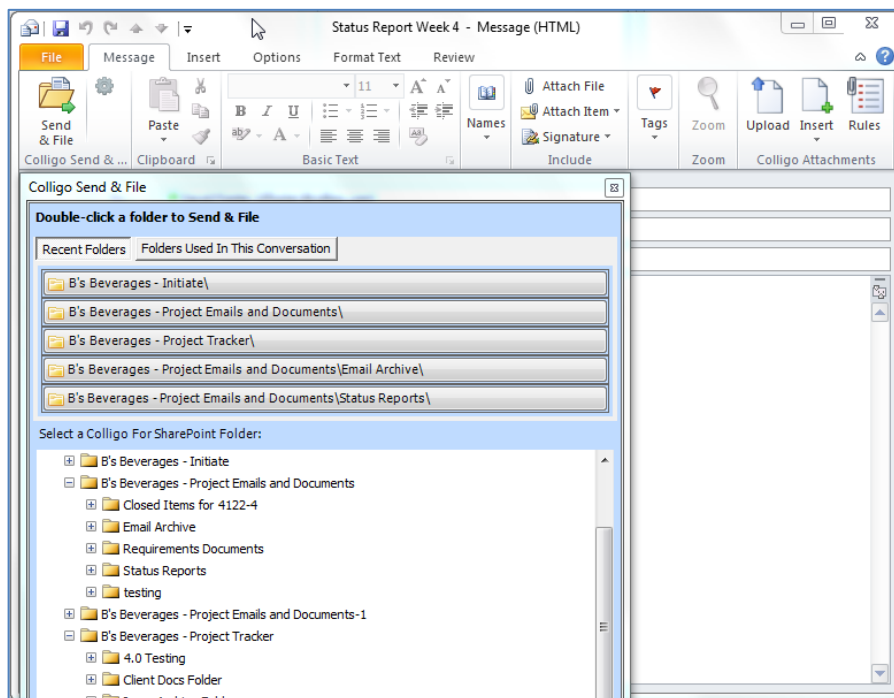
Using Send and File

You can automatically store copies of sent mail using the **Send & File** command in the Colligo Send & File toolbar.

You can select the destination SharePoint location using the Colligo for SharePoint folders in the Outlook folder tree. The Filing Advisor suggests locations based on recently used folders or email conversations.

Contributor automatically extracts email metadata (To, From, Sent, Subject, etc.) to similarly named SharePoint columns.

The .msg format maintains fidelity of the message, including attachments. A unique SharePoint file name is generated based on Sender, Sent, and, Subject.

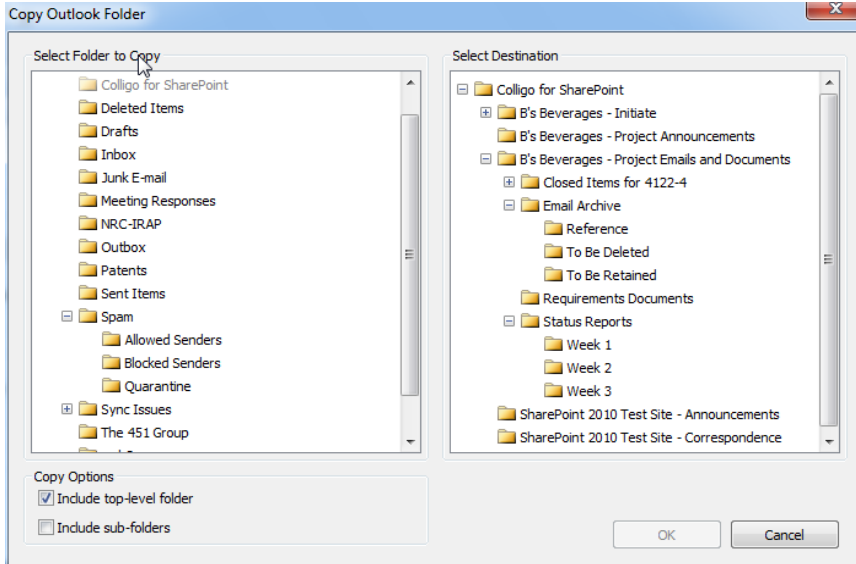


Using the Copy Folder

Folders, and their contents (including subfolders), 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.

The .msg format maintains fidelity of the message, including attachments. A unique SharePoint file name is generated based on Sender, Sent, and, Subject.

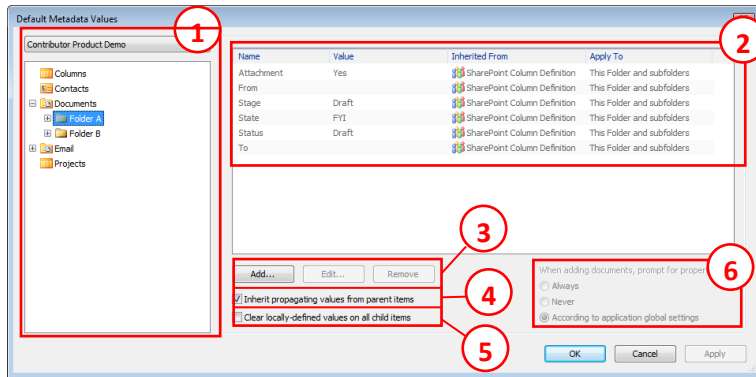


DEFAULT METADATA AND PROMPTING BEHAVIOR

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

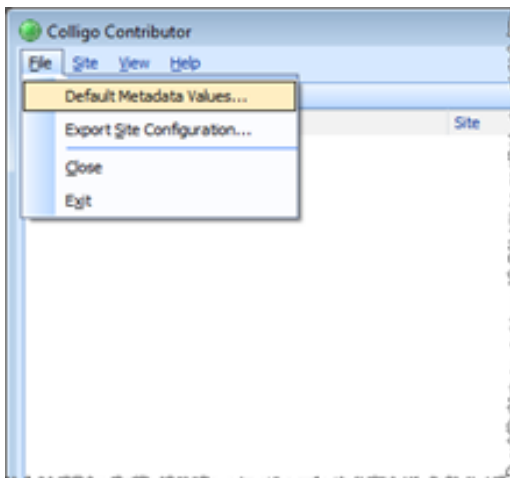
List Selector Panel	The List Selector allows you to change the List or Subfolder you wish to work with. NOTE: The List selector is only visible if the dialog is access through the File menu.	
Default Value Settings	Name	The Display Name of the SharePoint column
	Value	The default value to be applied.
	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	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	<p>Modify the prompting behavior. The options are:</p> <ul style="list-style-type: none"> • Always: The metadata prompt will be displayed when an item is added • Never: The metadata prompt will <i>*not*</i> be displayed when an item is added • According to application global settings: Prompting behavior is as defined in the View-> Options dialog <p>Child-items that are configured for inheritance will inherit this setting.</p>

Accessing the Dialog

File Menu

The file menu may offer different options depending on which elements of Contributor are 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. 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.

Storage location

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

Automatically downloads lists to resolve Site Column values

Contributor ensures that data for Lookup columns is also synchronized.