

Colligo Upgrade Guide

Colligo Email Manager
Colligo Briefcase for Windows
Contributor Pro



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Introduction

This document provides guidance during the migration of your configuration settings from previous Contributor Products such as Contributor 4.x and Email Manager 5.x during the upgrade to Colligo Email Manager, Colligo Briefcase for Windows, or Contributor Pro, which is a bundle of both products.

Once you have upgraded to a 6.0 product, you cannot revert to an earlier version without doing a full uninstall and reinstall.

User documentation is available on the Contributor Pro support website:

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

For any further technical details, please contact Colligo Technical Support at support@colligo.com, or for sales related questions, please contact sales@colligo.com.

Target Audience

- IT Administrators
- Technical Evaluators
- Deployment Managers

Overview

Contributor Pro is an easy-to-deploy .NET client-only application; no server modifications are required. The installer package is 10 MB in size. When installed, it consumes less than 20 MB of disk space, not including content. Contributor Pro supports customized installations and can be deployed using your choice of deployment tools.

Contributor Pro supports SharePoint 2010 and SharePoint 2010 Online (Office365), and Outlook 2007 and 2010.

Technical Requirements

Software Requirements

Contributor Pro requires the following software:

- Microsoft Outlook 2007, 2010 SP1, or 2013 Preview (32-bit or 64-bit edition)
- Internet Explorer 7, 8, or 9 (optional)
- Windows XP SP3, Windows Vista, Windows 7, or Windows 8
- Windows 2008R2 Server (for Terminal Services)

Contributor Pro also requires the following supporting software on the client machine:

- Microsoft .NET framework 3.5 Runtime
 - <http://www.microsoft.com/en-us/download/details.aspx?id=25150>
- Microsoft .NET framework 4.0 Runtime
 - <http://www.microsoft.com/download/en/details.aspx?id=17718>
- Microsoft Visual C++ 2010 Redistributable Package
 - 32-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=5555>
 - 64-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=14632>
- Microsoft Visual Studio 2005 Tools for Office Second Edition (VSTO 2005 SE) Runtime
 - <http://www.microsoft.com/en-us/download/details.aspx?id=22056>
- Visual Studio Tools for Office (VSTO) 2010
 - <http://www.microsoft.com/en-us/download/details.aspx?id=35594>
- Microsoft Office PIAs
 - Office 2010: <http://www.microsoft.com/download/en/details.aspx?id=3508>
 - Office 2007: <http://www.microsoft.com/download/en/details.aspx?id=18346>
- Windows Identity Foundation: <http://www.microsoft.com/en-ca/download/details.aspx?id=17331>
NOTE: Windows Identity Foundation (WIF) is not supported in Windows XP, so it is not necessary to install it if you are using XP. For Windows Vista/ 7/8, WIF is required to handle Colligo Administrator authentication through ADFS.

Server Software Requirements

Contributor Pro requires at least one of the following:

- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2010
- Microsoft SharePoint Foundation 2010
- SharePoint 2010 Online (Office 365)
- (Optional) Microsoft FAST Search Server 2010 for SharePoint

No additional server-side software is required from Colligo. Colligo Administrator is an optional server-side component facilitating enterprise deployments of Contributor Pro and other Colligo client software.

Contributor Pro has been tested with and fully supports Service Pack 1 (SP1) for SharePoint Server 2010 and SharePoint Foundation 2010. Contact Colligo Support (support@colligo.com) for compatibility questions regarding further Cumulative Updates and Service Packs for SharePoint.

Hardware Requirements

Contributor Pro has the same client system requirements as Office, which you can find here:

<http://technet.microsoft.com/en-us/library/ee624351.aspx#Overview>

Installing Contributor Pro

There are two installers for Contributor Pro. These are a .exe installer and a .msi installer.

Additionally, the installer package you need is dependent on which Operating System you are running:

- For a 32-bit operating system, use the x86 installer
- For a 64-bit operating system, 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.

Contributor Pro 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.

Silent Install or Uninstall

You can use the msiexec utility to install or uninstall silently.

To perform a silent install, use the following command line:

```
msiexec /i <Installer.msi> /qn
```

For example:

```
msiexec /i ColligoPro.msi /qn
```

To perform a silent uninstall, use the following command line:

```
msiexec /x <Installer.msi> /qn
```

You can install a customized version of Contributor Pro using the msi installer. When using a batch file to install a customized msi package, it is important to ensure the prerequisites are installed before attempting to install Contributor Pro.

An example batch file is listed below:

```
msiexec /i \\server\ProInstall\PreReq\O2007PIA.MSI /qn  
\\server\ProInstall\PreReq\vstor.exe /q  
msiexec /i \\server\ProInstall\CustomColligoPro.msi /qn
```

New Features

Email Manager 6.0 introduces the following features and functionality to the previous Email Manager 5.5 product:

- Authentication support for ADFS (Connected mode only)
- Improved email filing performance
- Offline email management support
- Easy syncing of SharePoint content for offline viewing, editing and filing (Offline mode only)
- SharePoint 2007 and Office 2007 support (SharePoint 2007 not supported in Connected mode)

Colligo Briefcase for Windows 6.0 introduces the following features and functionality to the previous Contributor Client and File Manager 4.4 product:

- Simplified product structure by combining former Colligo File Manager and Client
- Authentication support for ADFS and form based authentication types
- Supported filing to both upload-only and offline locations
- Option to display SharePoint hierarchy as a tree view in the desktop application
- Option to move content (in addition to copy content) between SharePoint folders

Upgrade Process

If you are upgrading from a previous Colligo product to Contributor Pro 6.0, you are able to migrate the configuration settings from those products to Contributor Pro. The following sections detail what is migrated, and other considerations needed during an upgrade.

The following table details which product is the recommended upgrade path based on your current Colligo product installation:

	If you have...	Upgrade to...
Contributor	Colligo Contributor Pro 4.x	Contributor Pro 6.0
	Colligo Contributor Client 4.x	Briefcase for Windows 6.0
	Colligo Contributor File Manager 4.x	Briefcase for Windows 6.0
	Colligo Contributor File Manager 4.x + Client 4.x	Briefcase for Windows 6.0
	Colligo Contributor Addin 4.x	Colligo Email Manager 6.0 (offline mode)
	Colligo Contributor Uploader 4.x	Colligo Email Manager 6.0
	Colligo Viewer	Briefcase for Windows (1 way sync)
	Colligo Reader (Free)	Briefcase Lite for Windows 6.0
Email Manager	Colligo Email Manager 5.x	Colligo Email Manager 6.0 (connected mode)
		Contributor Email Manager 6.0 (offline mode)
Email Manager & Contributor	Colligo Email Manager 5.x + Colligo Contributor File Manager 4.x	Contributor Pro 6.0

Migration Wizard

During the upgrade process, the Migration wizard helps automate the migration of the configuration settings from each Colligo product.

Please note that your offline content from the previous installation still exists on your local machine. Only the configuration settings are moved over to Contributor Pro.

Email Manager 5.x

Possible configuration settings that are migrated can include:

- Sites
- Favorites
- Number of Favorite items
- Folders
- Registry Keys and MSI Properties

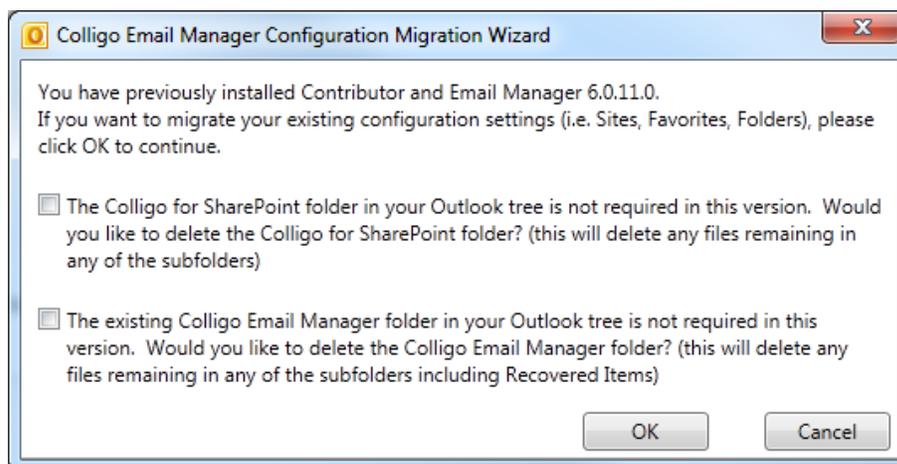
Contributor Pro 4.x

Possible configuration settings that are migrated can include:

- Sites
- Upload-only and Offline Document Libraries
- Registry Keys and MSI Properties

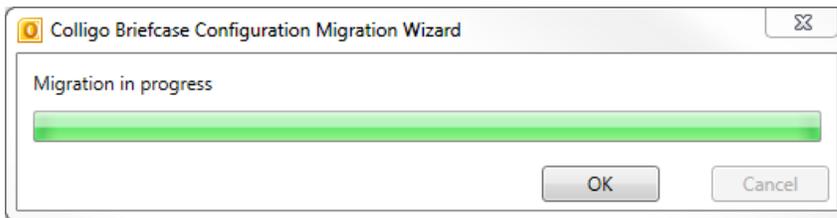
The Migration wizard launches from either Colligo Email Manager or Colligo Briefcase for Windows, whichever one you start first.

Screen 1:

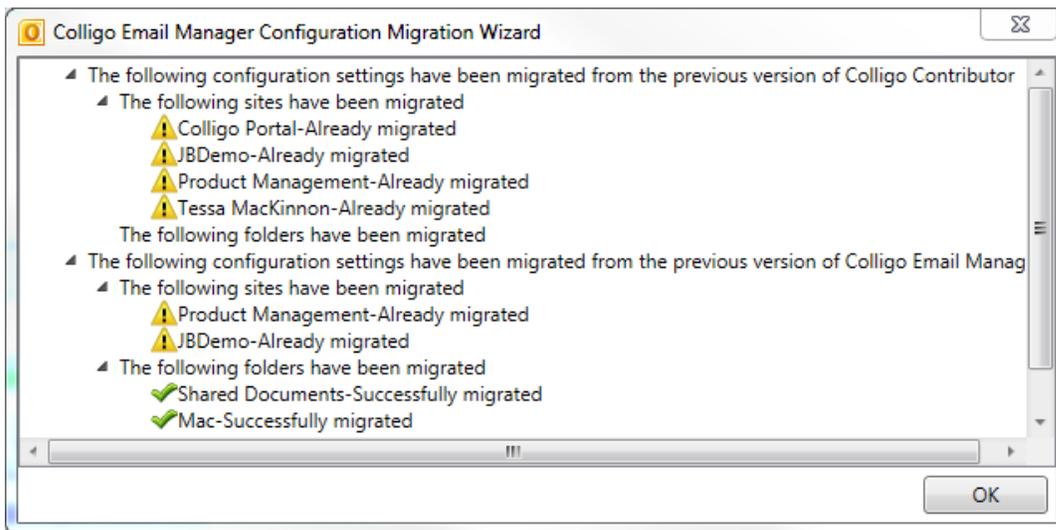


This screen allows you to delete existing folders from previous versions of Email Manager and Contributor. The options that display on this dialog depend on which Colligo products you previously had installed.

NOTE: The Colligo Email Manager folder is removed from the store, but if you don't check the box to remove it, there will be two instances of it in the folder tree. The **Colligo for SharePoint** folder is deleted permanently.

Screen 2:

NOTE: you can close this window and continue with other work. When the progress is complete, the third wizard screen displays.

Screen 3:

This screen displays the results of the migration. You can expand the sections to see which sites and folders have been migrated.

If a site is being migrated from both applications, the **Successfully migrated** tag displays beside the site in the first application it's migrated from. When it's migrated a second time from the second application, the **Already migrated** tag displays beside it.

If there is an error, the message **Please Configure This Folder Manually** displays. This message may display if a Site is being added as a Folder location, as this is not supported in Connected mode.

Enabling Migration

The migration wizard and process is determined by the presence of items in the following registry key location: Colligo/Contributor/PreviouslyInstalledProducts.

Database

There is no database upgrade required for Contributor 6.0.

Registry Keys

During the installation/migration process, the registry keys for your new program are automatically written to the correct location. There is no need to clean out the registry keys from earlier versions.

Email Manager 5.x keys can be referenced here:

<http://www.colligo.com/support/settings/email-manager/>

Contributor 4.x keys can be referenced here:

<http://www.colligo.com/support/settings/contributor/>

Contributor 6.0 keys

<http://www.colligo.com/support/colligo-contributor-pro/configuration-settings/>