

## QUICK START GUIDE

[Beta version]

### Introduction:

Colligo Reader is a free product which enables end-users to easily download some or all of the content in a SharePoint site to their laptops and view it offline, rather than having to copy files one by one through a browser. It is a client-only application, so no server installation or changes are required and it will work with any Windows SharePoint Services V2 or SharePoint Portal Server 2003 site.

For collaboration workspaces where users tend to make significant edits to content offline, Colligo Contributor™ is the preferred solution as it has full offline editing and two-way synchronization capabilities. For more information on Colligo Contributor visit [www.colligo.com/products/sharepoint](http://www.colligo.com/products/sharepoint).

### 1. Minimum Requirements

#### Operating Systems Supported:

- Microsoft® Windows® XP Professional
- Microsoft® Windows® 2000 Service Pack 2 or greater

#### Client Software Requirements:

- Microsoft® .NET framework 2.0
- Integration with Microsoft Office requires Office 2000 or later.
- Office 2003 SP2 required if you wish to make use of InfoPath forms libraries within Colligo Reader.

#### Server Software Requirements:

- Microsoft® Windows® SharePoint® Services 2.0 SP2 OR SharePoint Portal Server 2003 SP2

#### Hardware Requirements:

- Windows-based PC (with Pentium® II 450 MHz minimum, 20MB of free disk space, 64MB RAM)

## 2. Installation & Set up

### 2.1 Pre-Installation

#### Check for Microsoft .NET framework 2.0 (.NET 2.0)

- Check under Add/Remove Programs to make sure you have installed Microsoft .NET Framework 2.0.
  - Go to “Control Panel”
  - Open “Add/Remove Program”
  - Look for “Microsoft .NET framework 2.0”

#### Install .NET 2.0

- If you have not installed the .NET framework:
- Go directly to the download page [Click HERE](#)

**If you have been using any of the Colligo for SharePoint Beta versions, they will need to be removed.**

If you have been using any of the Colligo for SharePoint Beta versions you will need to remove that version before installing Colligo Reader. This is because the database and file stores have been changed for the current version.

- To remove the previous version of Colligo for SharePoint:
  - Go to “Control Panel”
  - Open “Add/Remove Program”
  - Look for “Colligo for SharePoint”, select, then click “Remove”.



**NOTE: Existing Colligo for SharePoint Workspaces will NOT be accessible after the upgrade process.** You may manually remove them from your hard disk by deleting the Colligo for SharePoint storage directory. The directory path will be similar to the following:

*C:\Documents and Settings\<username>\Local Settings\Application Data\ColligoForSharePoint  
or C:\Documents and Settings\<username>\Local Settings\Application Data\ColligoOfflineClient*

### 2.2 Installation

#### Install Colligo Reader for SharePoint

- Download the Colligo Reader MSI installation file to your local computer.
- Double-click on the installation file to install Colligo Reader.
- A "Colligo Reader for SharePoint" shortcut is created on your desktop for launching the software.

## 2.3 Set Up

### Download your first Workspace:

- Launch Colligo Reader
- Select “Download New Workspace”

Either from the Main Menu: [Workspace > Download New Workspace](#)  
Or from the Toolbar drop-down: [<No Workspaces>](#)

- Enter **Workspace address** and **credentials**.

Examples: <http://server/workspace>  
<https://secureserver/workspace>

Entering the User Name may require the use of the Domain as well as the user name. Example: domain\username

- If you choose “**Use default credentials**” Colligo Reader will use, in order of preference:

1. Your Windows Login credentials.
2. If your workspace has been saved into your web browser’s “Trusted Zone” and you have saved the credentials it will use those instead.

3. If these are not the correct logon for the site, Colligo Reader will prompt you for the correct credentials during download.

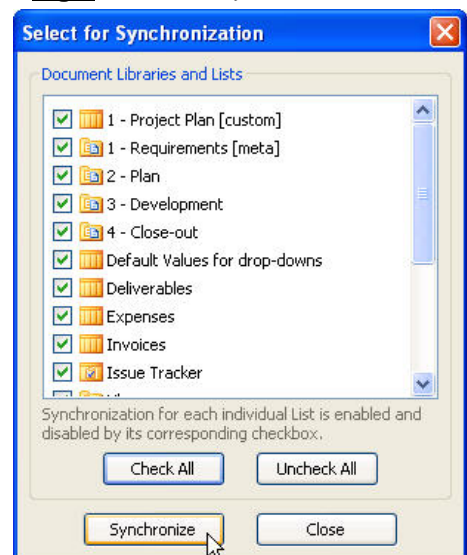
**TIP #1:** Adding your Workspace URLs to your Trusted Zone in your web browsers and saving the credentials will also allow you to open InfoPath Forms without a reoccurring prompt for the credentials each time you open one.

- Click “Download” and Colligo Reader will begin by providing a list of available Document Libraries and List for download.
- Make selects or click “Check all”
- Click “Synchronize”, download begins.
- You may be prompted for your credentials; this will be to download Form Libraries with InfoPath forms.
- **Download Results** screen will follow completion of the downloads:
  - **Successful** transfers will be indicated in **Green**
  - **Failures** will be highlighted in **Red**.

**Fig.1** – Download New Workspace Credentials



**Fig.2** – Download/Sync Selection

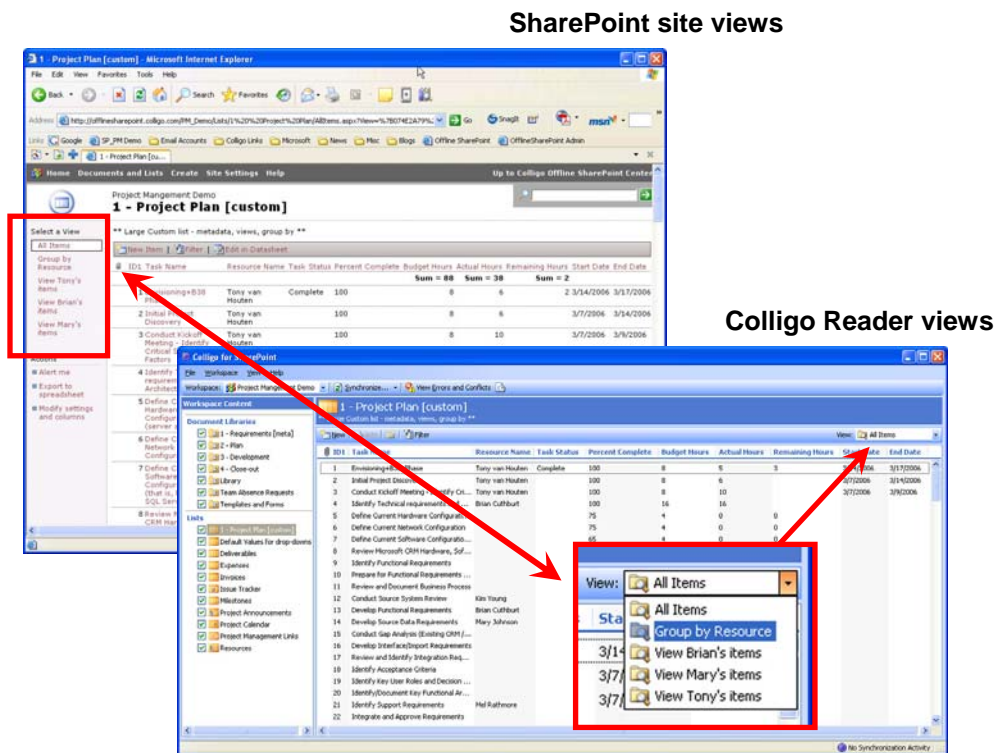


**TIP #2:** The most common causes of synchronization errors are: (a) a file on the local computer is open in an application; (b) a file in SharePoint is checked out or locked for editing. These types of error will appear in the **View Errors and Conflicts** pane indicating the issue or by double click it in the **Download Results** screen. Resolution can be accomplished for the **Library or List** pane. If the error is not the result of one of the above situations, then often simply re-download the particular folder or folders that had a failure this will generally resolve the issue. Be sure to check the box “Perform full synchronization” as this will include any additional web views that might be causing the error for the Libraries in question.

### 3. Getting Started in Colligo Reader

- 3.1 Click the Document Libraries and List in the left-hand Window to View them, just as in SharePoint.
- 3.2 Use Standard and Custom Views.

**Fig.3 – Views and Custom Views for Lists**



- 3.3 Colligo Reader allows for READ ONLY access to your Document Libraries and Lists. You may Drag and Drop files to your Desktop or My Documents to edit or modify them. You will NOT be able upload these changed documents even if you have added them to Colligo Reader, you will have to upload them manually when you are able to access the SharePoint site.