

## USER 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. The install package is only 3.3MB in size and it takes less than a minute to install with no license keys or product registration required.

Colligo Reader connects to a SharePoint WSS or SPS server using standard web services and site permissions, then downloads the content to a local file store on the Windows® file system which preserves document links. Colligo Reader provides support for most SharePoint content that is commonly used, including:

**Document libraries:** includes form libraries, metadata and views

**Lists:** custom, issues, contacts, events, announcements, tasks, links

Document and list content can only be read offline in Colligo Reader. This makes Colligo Reader best suited for use with intranet portals (e.g. Sales, Finance, etc.) that contain mostly read-only content. 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).

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## 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 the 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\\Local Settings\Application Data\ColligoForSharePoint*

*or C:\Documents and Settings\\Local Settings\Application Data\ColligoOfflineClient*

## 2.2 Installation

### Install Colligo Reader for SharePoint

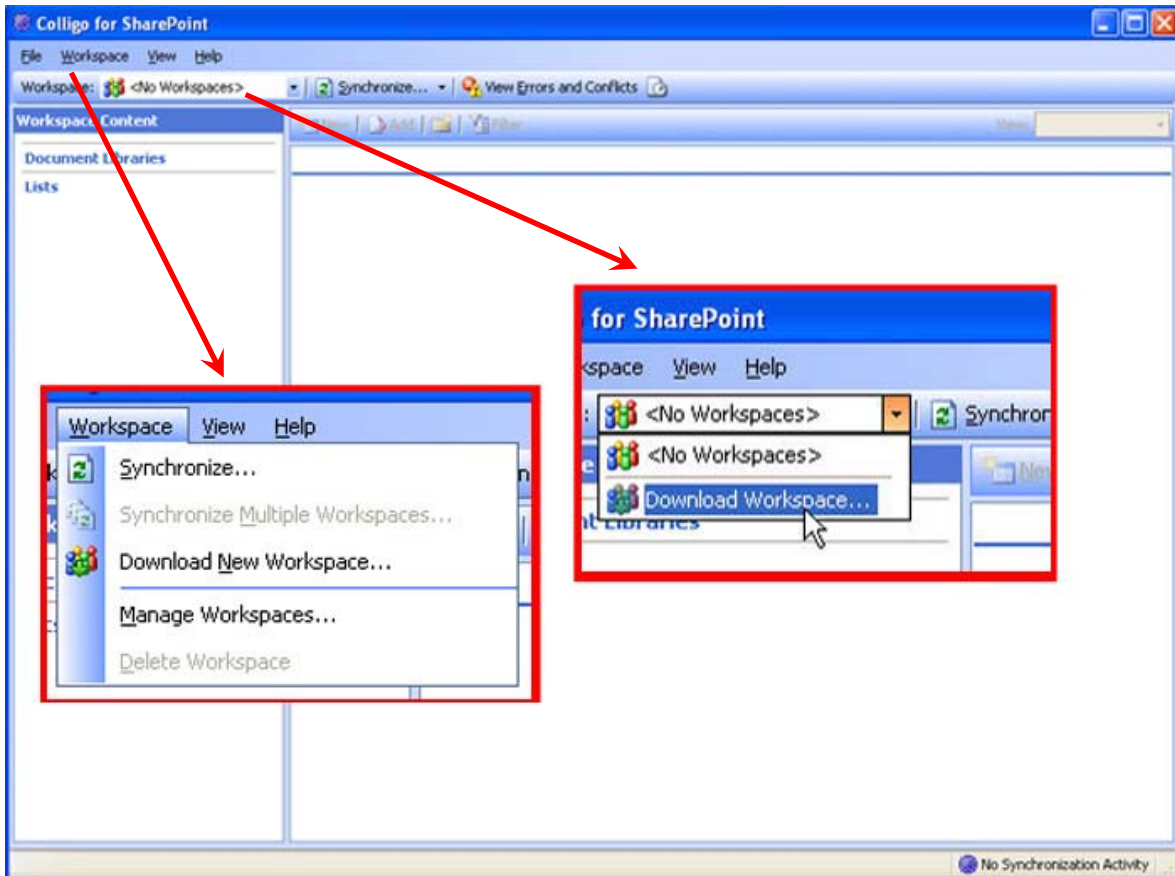
- Download the Colligo Reader MSI installation file to your local computer.
- Double-click on the installation file to install Colligo Reader.
- A "Colligo Reader for SharePoint" shortcut is created on your desktop for launching the software.

## 2.3 Set Up

### Download your first Workspace:

- Launch Colligo Reader
- Select “Download New Workspace” as show in Fig. 1 below.

**Fig.1 - Download New Workspace**



**Fig.2 – Download New Workspace Credentials**



- 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

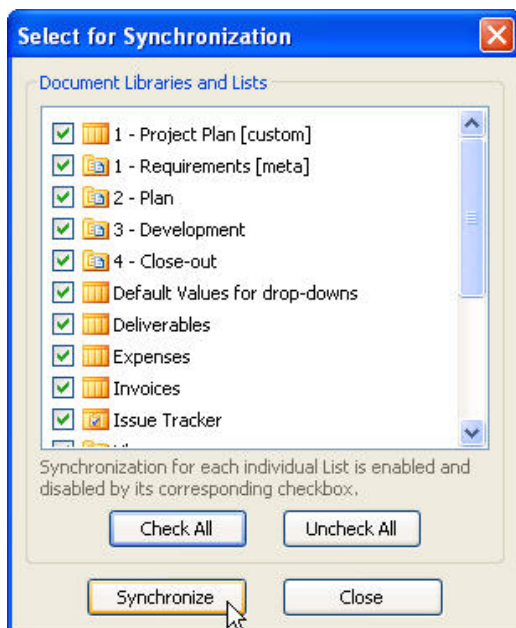
- If you choose “**Use default credentials**” Colligo Reader will use, in order of preference:
  1. Your Windows Login credentials.

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 browser 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 that are available for download.

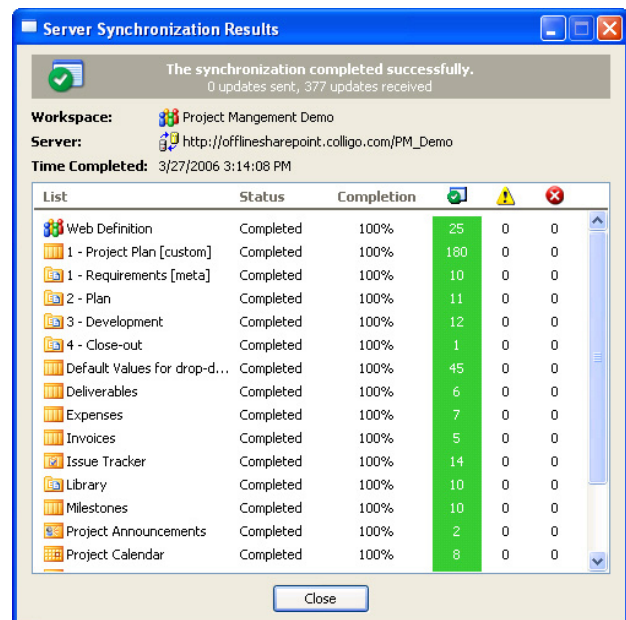
**Fig.3 – Download/Sync Selection**



- Select the Libraries and Lists you wish to download 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. To avoid this see **TIP #1** above.
- **NOTE:** The following SharePoint Document Library and List Types are NOT supported and will not be available for synchronization to the local computer: **Threaded Discussions, Surveys, Picture Libraries, Attendees and Objectives.**

**Fig.4 – Download/Sync Results**

- Download results (Fig.4)
- **Successful** transfers will be indicated in **Green**
- **Failures** will be highlighted in **Red**.



**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 Server Synchronization 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-synchronizing the particular folder or folders that had a failure 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.*

## 2.4 Security

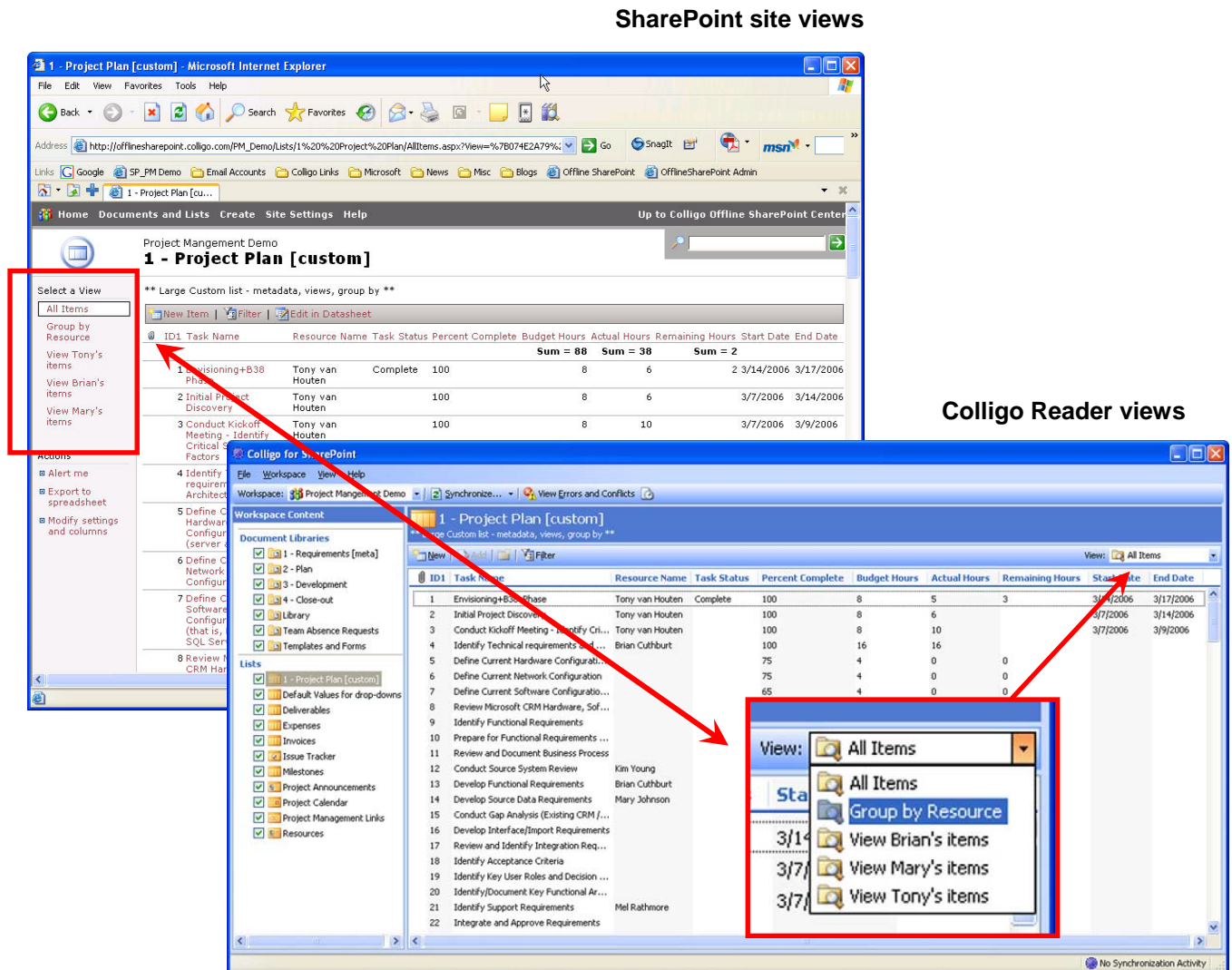
- Colligo Reader will not connect to a SharePoint workspace using anonymous credentials; a valid User name and password are required.
- Colligo Reader connects to secure servers over https, just as a web browser does. All traffic between Colligo Reader and a secure site is encrypted.
- For users on Microsoft Windows 2000 or Microsoft XP Professional, all stored site content is encrypted provided the hard disk is NTFS formatted.

### 3. Getting Started in Colligo Reader

3.1 Click the Document Libraries and Lists in the left-hand Window to View them, just as in SharePoint.

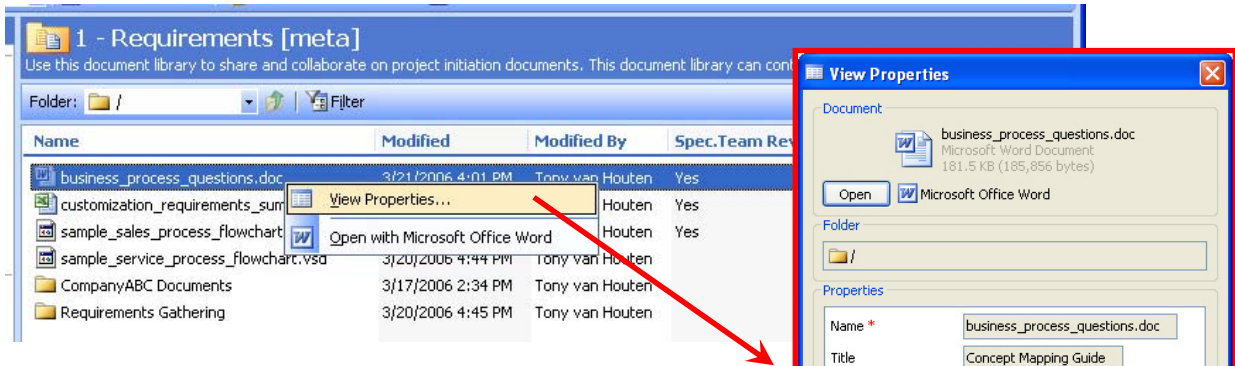
3.2 Use Standard and Custom Views.

**Fig.5 – 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.

**Fig.6 – Open & View Documents or Forms, View their Properties, including custom meta-data**



**Fig.7 – View List properties, including custom meta-data**



## 4. Feature Guide

### 4.1 Symbols in Colligo Reader for SharePoint



On Desktop

Tool bar:



Workspace



Synchronize ...



Synchronize Multiple Workspaces



View Errors and Conflicts



View Synchronization History

### Workspace Content pane:



Document Libraries

### List Types:



Links



Announcements



Contacts



Events



Tasks



Issues

### Custom Lists:



Custom Lists



Custom List in Datasheet View

## 4.2 Features

4.2.1 Colligo Reader for SharePoint allows you to download and view SharePoint sites built on Windows SharePoint Services (WSS) 2.0. This includes WSS sites that are hosted on SharePoint Portal Server 2003, and sites that use SSL encryption. To upload and synchronize with SharePoint sites you will need Colligo Contributor for SharePoint.

4.2.2 Standard SharePoint lists are supported, this includes:

- Document Libraries
- InfoPath Forms Libraries
- Custom Lists
- Links
- Announcements
- Contacts
- Tasks
- Issue List
- Events
- Agenda
- Decisions
  - from the *Decision Meeting template*
- "Directions" &
- "Things To Bring"
  - from the *Social Meeting template*

- 4.2.3 Download all (supported) lists on a site, or select individual lists to download.
- 4.2.4 Documents and attachments are downloaded along with document metadata and item properties.
- 4.2.5 SharePoint views are downloaded, including any filtering and sorting rules specified for the view. The [Me] and [Today] keywords are supported in view filters. Standard SharePoint filter operators, including "begins with" and "contains" are also supported.
- 4.2.6 Colligo Reader supports metadata embedded in a Microsoft Office document or InfoPath form and the metadata displayed in the Colligo Reader User interface.

## 5. Technical Notes

### 5.1. Limitations and Known Issues

- 5.1.1 During the initial download of a site, you may be prompted for your site credentials again if there is an InfoPath form library. This occurs because InfoPath uses your Windows login credentials by default, rather than the site credentials specified in Colligo Reader. This will not occur on subsequent synchronizations (unless the template for the form library is updated). You can avoid this prompt by adding the site to your Trusted Zone in Internet Explorer, and then choosing to save credentials the next time the prompt appears.
- 5.1.2 Despite the fact that the column is shown, "Checked Out To" status is not currently supported on the local computer.
- 5.1.3 The following standard SharePoint list types are not supported and will not be downloaded to the local computer:
  - Threaded Discussions
  - Surveys
  - Picture Libraries
  - Attendees
  - Objectives
- 5.1.4 Explorer-style views (for document libraries) are not supported and will not be downloaded to the local computer.
- 5.1.5 Calendar-style views are not supported and will not be downloaded to the local computer.
- 5.1.6 There is only limited support for list columns of type Lookup. User Information Lookups are fully supported. For Lookups on other lists (besides User Information), the field will not be editable in Colligo Reader. Also, Lookups on lists other than User Information will be treated as text data for purposes of sorting and filtering, which may result in the contents or ordering of Colligo Reader views being different from the corresponding SharePoint views.
- 5.1.7 There is only limited support for list columns of type Calculated.
- 5.1.8 Column totals for views are not supported.

- 5.1.9 The Row Limit for a view is ignored -- all items that match the View are displayed on the same page.
- 5.1.10 Synchronization history is only maintained for the duration of a run of the application. Synchronization history is cleared on shutdown of the software.
- 5.1.11 Colligo Contributor cannot be used to access SharePoint sites anonymously. You must always connect using the credentials of a valid user on the SharePoint site.

## 6. Upgrading to Colligo Contributor

### 6.1 Why

Document and list content can only be read offline in Colligo Reader. This makes Colligo Reader best suited for use with intranet portals (e.g. Sales, Finance, etc.) that contain mostly read-only content. 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.

### 6.2 How

For more information on Colligo Contributor visit [www.colligo.com/products/sharepoint](http://www.colligo.com/products/sharepoint) .