

# Alfresco – A Fresh Approach to Content Management

# Tutorial

Overview	2
Starting with Alfresco	3
Adding New Users	5
Home Spaces	7
Creating Content	. 10
In-line Content Editing	10
Managing Properties and Meta-Data	12
Spaces	. 14
Working with Space Templates	15
Smart Spaces	. 16
Adding Rules	17
Adding Aspects	19
Using the Clipboard	21
Collaborating with Other Users	. 23
Checking Out Content	. 25
Checking In Content	. 26
Version History	27
Sending Content for Review	. 28
Uploading and Transforming Content	. 29
Categories and Advanced Search	. 32
Forums and Discussions	. 36
Summary	. 39



### Overview

This document provides an overview tutorial of the Alfresco<sup>™</sup> Open Source Content Management System to accompany the download of the system available at: <u>http://www.alfresco.org/download.html</u>. You can also access an on-line demo by going to: <u>http://www.alfresco.org/flash/alfrescov9d.html</u>.

In this tutorial we will go through the process of starting to work with Alfresco, right from the point after it is installed and running. We will walk through the process of logging in, adding a new user, and creating and managing content. We will also introduce the concept of a Smart Space, which is a collaborative space that uses rules to simplify the handling, management and transformation of content. We will also show how to use additional properties and categories to organize and find content.

Before starting, make sure that your system has been installed properly. The installation is fast and easy for either Microsoft Windows® or Linux. You can also choose to install it with JBoss® Portal 2.2 or Apache Tomcat. If you have any issues in the installation, you can find help in the Alfresco Forums at: <u>http://www.alfresco.org/forums/</u>

To begin, if Alfresco was installed from the Tomcat bundle, start the web client from: <u>http://localhost:8080/alfresco</u>

If Alfresco was installed from the JBoss bundle, you may use the same URL as for Tomcat, or start the web client in the portal from: <u>http://localhost:8080/portal</u> and navigate to 'web-client' from the Page Menu and then maximize the portlet (top-right-most icon).



# **Starting with Alfresco**

When you open your browser to Alfresco the very first time, you are taken to the *Guest Home*. This space can be used to hold any content that you would like to be available to anyone who has access to your Alfresco server.

🕙 Alfresco Web Cli	ent - Mozilla Firefox		
Eile Edit View Go I	<u>B</u> ookmarks <u>T</u> ools <u>H</u> elp		
	🔘 🏠 🎕 http://localhost:8080/alfresco/faces/jsp/browse/browse.jsp	۱	G
Firefox Help			
Company H	Iome My Home	)Help 🔁 Login (Guest)	4
Shelf	Guest Home		
Clipboard  Recent Spaces	Alfresco Guest Home & This view allows you to browse the items in your space. The guest root space	Actions More>>	View Details View Icon View Browse View Dashboard View
V Shortcuts	Browse Spaces		
	No items to display. Click the 'Create Space' action to create a space.	Page	1of 1 🕅 🖣 1 🕨 🕅
	Content items		
	No items to display. To add an existing document click 'Add Content' action. To create an HTML or	Plain Text file dick 'Create Content' action Plain Text file dick 'Create Content' action Plage	on. 1of1∥4 4 1 ⊵ ⊵∥

First, a bit of orientation. There are 3 main areas in the Alfresco user interface: a toolbar along the top; the Shelf; and the main working area.

#### Toolbar



The toolbar contains two main navigation buttons that take us to the *Company Home* or your *Home Space*, as well as search and help capabilities. We can also hide and show the Shelf using the icon to the left of the help.

#### Shelf

The Shelf contains a number of different features to help work with content, such as the Clipboard and Shortcuts. The Recent Spaces provides an easy way to go back to a Space we have recently viewed.

Shelf
Clipboard
Recent Spaces
Shortcuts



#### Working Area

The working area will change depending on what information we are looking at or what task we are performing. The top of the working area will always have a navigation breadcrumb that allows us to jump to any part of the breadcrumb path. For information views we will usually have a summary area along with actions or alternative views. The details and options will change depending on what we are looking at and doing, as well as who we are.

Company Home		
Alfresco Company Home This view allows you to browse the items in your space. The company root space Open Network Folder	Actions Create Space View Details Add Content More	View Details View Icon View Browse View

If you want to add and create content, then you will need to login. Click the 'Login' link. When Alfresco is installed, it creates an administration user called 'admin' with a default password of 'admin'. So, let's login and we'll be taken to the *Company Home* as shown in the screen below.

Alfresco Web Client -	Mozilla Firefox	
ile <u>E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookn	arks Tools Help	4
3d) 🙆 🤇	) 🏠 🥥 http://localhost:8080/alfresco/faces/jsp/dialog/delete-space.jsp	🔶 🧿 🕼 gforge
Firefox Help		
Company Home	My Home	Help Logout
Shelf	Company Home	
Clipboard  Recent Spaces  Company Home	Alfresco Company Home This view allows you to browse the items in your space. The company root space Open Network Folder	Actions View Create Space Details View III View Details Icon View Add Content More
🗭 test	Browse Spaces	
▼ Shortcuts	Alfresco Tutorial	ta Dictionary 🔏 🖄 🏛 🗎 r managed definitions ace Templates   Content Templates
		iN N Page 1 of 1 ⊭ ⊮i
	Content items	
		W 4 Page 1 of 1 ♭ ♭W
	CONTENT MANAGED BY	
	Alfresco Software Inc. @ 2005 All rights rese	rved,

When we have finished using Alfresco, we can just close the browser window without logging out. The next time you go to Alfresco, you will automatically go straight to the login page. If you click 'Logout' in the toolbar and then close the browser window, you will be taken to the Guest Home the next time you access Alfresco.



# **Adding New Users**

Before we add some new users and define their own personal working spaces, we need to decide how we are going to organise our repository and where user home spaces live. For this tutorial we are going to put the user homes all in the same location, so we need to make a space to contain them all. We are going to create a space named 'Users' in the 'Company Home', so, since we are in the right place, we just need to select *Create Space* from *Actions* and we will be taken to the Create Space dialog.

🖲 Create Space - Mozilla	a Firefox	_ 🗆 🔀
<u>File Edit View Go Bookma</u>	arks <u>T</u> ools <u>H</u> elp	5 * 5 5 4 5
Sol 📀 📀 🧲	) 🏠 🕒 http://ocalhost:8080/alfresco/faces/jsp/browse/browse.jsp 🛛 😵 🧿	G gforge
😻 Firefox Help		
Company Home	My Home 2 Help Logout	Q
Shelf	Company Home	
Clipboard	Create Space Enter information about the new space then dick Create Space.	Create Space
test	Name: Users * Description: User home spaces	Cancel
Shortcuts	Choose space icon:	
	To create your space dick Create Space.	

Now fill in 'Users' for the *Name* with any descriptive text in *Description*, and choose an icon to use for the space, then click *Create Space*. We have now created a space.

b 🔿 🎯 🤇	) 🏠 💿 http://localhost:8080/alfresco/faces/jsp/dialog/new-space.jsp	😵 🧿 <u> (</u> gforge
irefox Help		
Company Home	My Home	👔 @Help Logout
Shelf	Company Home	
Clipboard Recent Spaces Company Home test	Alfresco Company Home This view allows you to browse the items in your space. The company root space Open Network Folder	Actions     View
V Shortcuts	Step by step guide to the Alfresco application	Data Dictionary User managed definitions Space Templates   Content Templates
	Users $\& \square \square \blacksquare$ User home spaces	ivi viPage 1 of 1 ⊭
	<u></u>	



While we are here, create another space named 'Projects' that we will come back to later. Next we want to add a new user. As we are logged in as an administrator, there is an action under the *Actions More* link called *Administrative Console* that we need to use.



This opens the Administration Console that has a number of options available.

Sdministration Cons	ole - Mozilla Firefox			
<u>File Edit View Go Book</u>	marks <u>T</u> ools <u>H</u> elp			•*• •_•
3000	) 🏠 🎯 http://localhost:8080/alfresco/faces/jsp/browse/browse.jsp		ی 📀	G gforge
Firefox Help				
Company Hom	e My Home	📄 🙀 ②Help Logout 🛛	•	٩
Shelf	Company Home			
Clipboard	Company Home Administration Console Use this view to perform system administration functions.			
Recent Spaces     Company Home     test     Shortcuts	System Users System Information Category Management			Close
	Export			

The one we are interested in is *Manage System Users*. Click on this and we will be presented with a list of current users, including the pre-configured 'admin' account. We need to select the *Create User* action, which will take us to the new user wizard.



🕘 User Management - I	lozilla Firefox				
<u>File Edit View Go Bookn</u>	narks <u>T</u> ools <u>H</u> elp				1. A.
3000	) 🏠 💿 http://localhost:8080	/alfresco/faces/jsp/dialog/a	dmin-console.jsp	۱	G gforge
😻 Firefox Help					
Company Home	My Home			👔 2 Help Logout 📴 🗸	Q
Shelf	Company Home			Sa (198)	
Clipboard	Company Home Manage System Us Manage the users of the repo	ers		Create User	View User Details
Recent Spaces	Users			,	Close
🚺 test	Name 🗇	User Name 🔻	Home Space	Actions	
V Shortcuts	Repository Administrator	admin	/Company Home	🂞 🐉 14 4 Page 1	of100

The new user wizard prompts us for details of the person's name and email in the first step.



#### **Home Spaces**

In the second step we give the username details, as well as the location for where their home space should be created. To use the space selector, navigate the links to move up and down the space hierarchy, selecting the required space's radio button, then click *OK*. For our example, we are going to put the new home space in the 'Users' space we created earlier.



🕘 User - User Propertie	s - Mozilla Firefox				
<u>Eile E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookma	arks <u>T</u> ools <u>H</u> elp				
So So C	) 🏠 💿 http://loca	ilhost:8080/alfresco/faces/jsp/wi	izard/new-user/user-properties.jsp	* 🔹 📀	gforge
Firefox Help					
Company Home	My Home		R	Help Logout	٩
Shelf	Company Home				
Clipboard	Company Home New User W This wizard helps y	<b>izard</b> ou to add a user to the repositor	у.		
Recent Spaces     Company Home     test	Steps 1. Person Properties 2. User Properties 3. Summary	Step Two - User Propertie Enter information about this u User Properties	es Jser,		Next Back Finish
Shortcuts		Password:	••••••	*	Cancel
		Home Space	t		
		Home Space Location:	Go Up Data Dictionary Alfresco Tutorial Users Projects OK Cancel		
		Home Space Name:			
		To continue click Next.			

Then give the name for their home space: here we are using 'paulhh'.

🙂 User - User Propertie	es - Mozilla Firefox				
<u>Eile E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookn	narks <u>T</u> ools <u>H</u> elp				
Sb () () ()	) 🏠 💿 http://loca	lhost:8080/alfresco/faces/jsp/v	vizard/new-user/user-properties,	jsp 🔹 😵	G gforge
😻 Firefox Help					
Company Home	My Home			👔 ②Help Logout 📴 🗸	٩
Shelf	Company Home				
Clipboard	Company Home New User W This wizard helps y	<b>izard</b> ou to add a user to the reposito	ry.		
Recent Spaces	Steps 1. Person Properties 2. User Properties 3. Summary	Step Two - User Propert Enter information about this User Properties	ies user.		Next Back Finish
Shortcuts	C. Common y	User Name:	paulhh	*	Cancel
	1	Password:		*	
17 <u>2-</u>	8	Home Space			
		Home Space Location:	Users		
		Home Space Name:	paulhh		
		To continue click Next.			

We can select *Finish* now, or go to the next step to see a summary of the details we have entered and then finish. This will create the new user and their home space and return us to the list of users. While we are here, we will create another user for later on named 'Joe'.



User Management - I	Aozilla Firefox				
ile <u>E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookr	narks <u>T</u> ools <u>H</u> elp				1. A.
۵۰ 🙆 🔇	) 🏠 🥥 http://localhost:8080	i/alfresco/faces/jsp/wizard/r	new-user/user-properties.jsp	۱	G gforge
Firefox Help					
Company Home	My Home		🛛 🕅 🖓 Не	elp Logout	Q
Shelf	Company Home				
Clipboard	Company Home Manage System Us Manage the users of the repo	ers		Actions Create User	View User Details
Recent Spaces				,	
Company Home	Users	1.10.11 2.101		(1.1301)	Close
🚺 test	Name 🗇	User Name 🔻	Home Space	Action	15
	Repository Administrator	admin	/Company Home	ar 🐉 🐉	
V Shortcuts	Paul Holmes-Higgin	paulhh	/Company Home/Users/paulhh	88	8
				N 4 Page 1	of 1 1 1



# **Creating Content**

We can now login as the newly created user: click *Logout* from the toolbar and then login using the details for the new user. This time, the user is taken to their Home Space, but they can still easily navigate to the Company Space and elsewhere. All the options to create sub-spaces and add content are available. The first thing we are going to do is see how we can create web content directly in the browser.

#### In-line Content Editing

From the *Actions* menu for the user's home space, select *Create Content* (it is available from the More popup). A wizard is started that allows you to create new content.



We can now add some HTML content through the WYSIWYG editor. We will add a web page as an example, including text formatting and images.





Selecting the *Next* button in the wizard takes us to a step where we can give whatever appropriate properties we want.

🙂 Create Hew Cont	ent - Properties - Mozi	illa Firefox				_ 🗆 🛛
<u>File Edit View Go</u>	<u>B</u> ookmarks <u>T</u> ools <u>H</u> elp					0*0 0 0 0 0
۵ 📀	🔘 🏠 💿 http	p://localhost:8080/alf	resco/faces/jsp/wizard/create-content/create	.jsp	🔹 🧿 🕼	orge
Firefox Help						
Company H	lome <mark>My Home</mark>			📔 🚱 🕐 Help Logout		٩
Shelf	paulhh					
Clipboard  Recent Spaces	Paulhh Create Cont This wizard helps y	ent Wizard ou to create a new d	ocument in a space.			
paulhh	Steps 1. Enter Content 2. Properties	Step Two - Pro Enter informatio	o <b>perties</b> n about this content.			Next Back
Shortcuts	3. Summary	File Name: Type: Content Type: Title: Description: Author: To continue dick	newfile.html * Content  * HTML newfile.html * Generic intro block for Alfresco paulhh Next.	*		Cancel

We can now either select *Next* to take us to a summary page of what new content is going to be created, or just select *Finish* now. In all Alfresco wizards, the *Finish* button



becomes enabled when there is enough information to complete the task, any additional steps are optional.

🕘 Alfresco Web C	lient - Mozilla Firefox		
<u>File Edit View Go</u>	Bookmarks Iools Help		
$\bigcirc$ $\bigcirc$ $\bigcirc$	) 🔘 🌠 💿 http://localhost:8080/alfresco/faces/jsp/wizard/create-content/properties.js	sp 🔹 🔮	G gforge
Firefox Help			
Company	Home My Home	Nelp Logout	٩)
Shelf	paulih		
Clipboard  Recent Spaces  paulhh	Alfresco paulhh This view allows you to browse the items in your space. Open Network Folder	Actions Create Space Wew Details Add Content More	View Details View Icon View Emowse View
V Shortcuts	Browse Spaces		
			N √ Page 1 of 1 ⊨ ₩
	Content items		
	eenric intro block for Alfresco		
			😽 🤄 Page 1 of 1 🖗 🕅

We have now created our first piece of content in the repository!

#### Managing Properties and Meta-Data

To see the details of the content we can select the *View Details*, one of the icons to the right of the content item (not the space details action in the header).

cument Details - Mozilla Fir dit <u>V</u> iew <u>G</u> o <u>B</u> ookmarks <u>T</u> ool:	fox. Help		
0 0 🖄	Http://localhost:8080/alfresco/faces/jsp/browse/browse.jsp	🔶 🔇 🕫	rge
fox Help			
Company Home Hy Home		Melp Logout	0
Shelf paulhh			
ard paulhh Detai Location View the	<b>s of 'newfile.html'</b> : /Company Home/Users/paulhh .details about the content.	Actions Nu Stat Check Out Nore	avigation ext Item evious Item
ulhh 🛛 🔽 Preview			Close
s View In Brows	r		
Properties		2	
۲	Name:         newfile.html           Format:         HTML           Title:         newfile.html           Description:         Generic intro block for Alfresco           Sizei:         0.68 KB           Creator:         paulhh           Created Date:         October, 5 2005 14:45           Modified Date:         October, 5 2005 14:45           Edit Inline:         Yes		
Workflow			
Category			
Version His	ory		



From the content details page, we can change any of the properties by selecting the edit icon for the Properties panel (right-hand side). Selecting the content name in the Preview panel will request the content to be viewed or downloaded through the browser. We may also download the content as a file by selecting the content icon or name in the space browser.



### Spaces

Next, we are going to set up a new project space where we can work on some content with other team members. Navigate to the Company Space (either from the breadcrumb or the toolbar) and then into the Projects space we created earlier. This time, rather than create sub-spaces all by hand, we are going to use a template space that contains all the standard elements we need. From the space *Actions*, select *Advanced Space Wizard*.

🕘 New Space - Create I	From - Mozilla Firefox			_ 🗆 🔀
<u>File Edit View Go Bookr</u>	narks <u>T</u> ools <u>H</u> elp			
Sb 🕗 🥝 🤇	) 🏠 💿 http://loc	alhost:8080/alfresco/faces/jsp/browse/browse.jsp	ی 📀	G gforge
😻 Firefox Help				
Company Home	My Home		Help Logout	<u> </u>
Shelf	Company Home > Projec	ts		
Clipboard     Clipboard     Recent Spaces     Projects     Company Home     paulhh     Shortcuts	Projects New Space This wizard helps Steps 1. Starting Space 2. Space Options 3. Space Options 4. Summary	Wizard you to create a new space. Step One - Starting Space Choose how you want to create your space. How do you want to create your space? From scratch Based on an existing space Using a template To continue dick Next.		Next Prish Cancel

It is possible to create a complete tree of sub-spaces by basing the new space on an existing space or a template. We are going to use a template, so selecting *Next* takes us to a step where we can choose which template.

🕘 New Space - From Te	emplate - Mozilla Firefo	x			
<u>File E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookn	narks <u>T</u> ools <u>H</u> elp				*** ***
So O C	) 🏠 💿 http://loc	alhost:8080/alfresco/faces/jsp/wizard/new-space/create-from.jsp	1	🤏 🧿 💽	gforge
Firefox Help					
Company Home	My Home		🗿 🕐 Help Logout		Q
Shelf	Company Home > Project				
Clipboard	Projects New Space This wizard helps y	Wizard oou to create a new space.			
Projects Company Home	Steps 1. Starting Space 2. Space Options	Step Two - Space Options Select space options.			Next Back
D paulhh	3. Space Details	Template Space			Finish
	4. Summary	Select the template you want to use.			Cancel
Shortcuts	·	Software Engineering Project			
	k	Note: Any content rules for spaces will also be copied.			
		To continue click Next.			



#### Working with Space Templates

We are going to use the *Software Engineering Project* template, so we choose this and select *Next* to specify the details we want for the new space including its name – in this case 'Project Voodoo'.

🕘 New Space - Details - Mozilla Fir	efox		_ 🗆 🛛
<u>Eile Edit View Go Bookmarks T</u> ools	Help		•*• •_•
	Whttp://localhost:8080/alfresco/fac	es/jsp/wizard/new-space/from-template.jsp 🔹 😵 🧿 🕻 gf	forge
Firefox Help			
Company Home My Home		Help Logout	<b>_</b> Q)
Shelf Company H	Iome > Projects		
Clipboard Ne	jects W Space Wizard wizard helps you to create a new space	ce.	
▼ Recent Spaces  Projects Company Home Comp	ng Space Enter information at Space Details	ce Details nout the space.	Next Back Finish
4. Summ	ary Name:	Project Voodoo *	Cancel
▼ Shortcuts	Description:	Top secret project for next release	
	Other Options		
	Choose space icon:	0 💫 0 🖉 0 🖉 0 🖉 0 🛃	
	Save As Temp	late	
	Name:		
	To continue click Ne:	xt.	15

Again, we can select *Next* to go to the summary page or select *Finish* now. We can see that a new space has been created with standard sub-spaces for an engineering project.

💐 Alfresco Web Client	Mozilla Firefox		
<u>File Edit View Go Bookn</u>	narks <u>T</u> ools <u>H</u> elp		
Sb ()	) 🏠 🦳 http://localhost:8080/alfresco/faces/jsp/wizard/new-space/details.jsp	۱	G gforge
🥹 Firefox Help			
Company Home	My Home	Help Logout	٩
Shelf	Company Home > Projects		
Clipboard  Recent Spaces  Projects	Alfresco Projects This view allows you to browse the items in your space. Shared project spaces Open Network Folder	Actions Create Space Wiew Details Add Content More	View Details View Icon View Browse View
Company Home	Browse Spaces		
Shortcuts	Project Voodoo & Comparison Compared to Compare the Compared to Compare the Compared to Co		
			NA A Page 1 of 1 P PN



## **Smart Spaces**

One of the key features of Alfresco is the ability to define rules that affect content within a space. These rules can be used to provide all kinds of creative solutions to automation and management of content. Rules are fired when content comes in or out of a space and may also apply to content directly in the space or in sub-spaces. A rule is made up of two main elements: the conditions on the content for the rule to match and the actions that are then performed. Any number of conditions and actions may be defined in a rule.

For now, we are going to add a few rules to illustrate their capabilities. We are going to make part of our new project space work in a more structured and auditable way. First we need to navigate to the Project Voodoo Documentation space.



Here we can see 3 spaces that contain the documents in their different stages of completion, as well as a space with sample content. We are going to use the rules to set up a simple workflow that allows the documents to progress through these spaces. Also, since we want to allow several people to work on the documents, plus keep track of the different versions as they are edited and be able to see who changed the documents and when, then we are going to make all the content versioned. Since all the documents are going to start their lives in draft form, we navigate into the Drafts space and select the *Manage Content Rules* action (under More...).



🥑 Space Rules - Mozill	a Firefox						
<u>Eile E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ook	marks <u>T</u> ools <u>H</u> elp						
Sd O (	) 🏠 💿 http://lo	alhost:8080/alfresco/faces/jsp/brow	/se/browse.js	ip.	👻 (	G gforge	e
Firefox Help							
Company Home	e My Home			<b>N</b> 2	Help Logout		Q
Shelf	Company Home > Projec	ts > Project Voodoo > Documentatio	on > Drafts				
Clipboard	Drafts Content Ru This view shows y	les ou all the rules to be applied to contr	ent in this spa	ice,	Actions Create Rule	Filter C	ontents d
Recent Spaces							
Drafts Documentation Project Voodoo	Title →	Description	Local	Created Date	Notified Date G	age 1 of 1 P PI	Close

#### Adding Rules

To add a new rule, select the *Create Rule* action, then we will be taken through the rule wizard to define it.

🥘 New Rule - Details - /	Nozilla Firefox		
<u>File E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookn	narks <u>T</u> ools <u>H</u> elp		514 54
S. O C	) 🏠 💿 http://	calhost:8080/alfresco/faces/jsp/dialog/rules.jsp	🧿 🕼 gforge
😻 Firefox Help			
Company Home	My Home	🙀 🕐 Help Logout 🗌	=-
Shelf	Company Home > Proje	cts > Project Voodoo > Documentation > Drafts	
Clipboard	Drafts New Rule This wizard help	<b>Nizard</b> ; you create a new rule.	
Recent Spaces     Drafts     Documentation     Project Voodoo     Projects     Company Home      Shortcuts	Steps 1. Details 2. Conditions 3. Actions 4. Summary	Step One - Enter Details         Type:       Inbound         Title:       All versioned         Description:       Make all content versioned         Other Options       Image: Content versioned         Image: Provide the provided of	Next Frish Cancel

The first step allows us to choose what type of rule it is, that is to say, when the rule gets tested. Currently, the options are *inbound*, which means when content is copied, created or added to the space, and *outbound*, when content is moved or deleted from the space. We can give a title to identify the rule as well as a brief description – in this case we will give it the title 'All versioned'. We will also enable the rule to be inherited by any subspaces in Drafts. The second step allows us to define the conditions that are tested on the content before the action is performed.



🕘 New Rule - Condition	ns - Mozilla Firefox				
<u>Eile Edit View Go Bookr</u>	narks <u>T</u> ools <u>H</u> elp				0
Sb () ()	) 🏠 🕥 http://	ocalhost:8080/alfresco/faces/jsp/wizard/new-rule/details.jsp		۱	G gforge
😻 Firefox Help					
Company Home	Му Ноте		🛛 🙀 ②Help Logout	(=-	<b>A</b>
Shelf	Company Home > Proje	ects > Project Voodoo > Documentation > Drafts			
<ul> <li>Clipboard</li> <li>Recent Spaces</li> <li>Drafts</li> <li>Documentation</li> <li>Project Voodoo</li> <li>Projects</li> <li>Company Home</li> <li>Shortcuts</li> </ul>	Steps 1. Details 2. Conditions 3. Actions 4. Summary	Wizard s you create a new rule. Step Two - Select Conditions 1. Select Condition All Items 2. Click to set values and add to list Set Values and Add 3. Selected Rule Conditions To continue dick Next.			Next Back Frieh Cancel

In this example, we are going to select *All Items*, so that the action is performed on any content added to the space. We must make sure we click the *Set Values and Add* button to set any condition settings. Since there are no condition settings in this case, the condition is added to the list.



We have no additional conditions to add, so click Next to define the actions.



🥘 New Rule - Select Act	ion - Mozilla Firefox				
<u>File E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookm	arks <u>T</u> ools <u>H</u> elp				***
Sb () () ()	) 🏠 💿 http://	localhost:8080/alfresco/faces/jsp/wizard/new-rule/condition.jsp		۱	G gforge
😻 Firefox Help					
Company Home	My Home		🛛 👔 🕐 Help Logout		<b>Q</b>
Shelf	Company Home > Proj	iects > Project Voodoo > Documentation > Drafts			
Clipboard  Clipboard  Recent Spaces  Dorafts Documentation Project Voodoo Projects Company Home  Shortcuts	Steps 1. Details 2. Conditions 3. Actions 4. Summary	Wizard Is you create a new rule. Step Three - Select Actions 1. Select Action Add aspect to item 2. Click to set values and add to list Set Values and Add 3. Selected Rule Actions			Next Back Finish Cancel
		To create the rule click Finish.			

#### **Adding Aspects**

For the action we are going to select *Add aspect to item*, since we want to add the "versionable" aspect to all content. After clicking *Set Values and Add*, we give the relevant action settings, in this case choosing the actual aspect.



After clicking OK, we can now choose to finish the rule wizard, or go to a summary page to check the details of the rule before adding it.



a Firefox			
marks <u>T</u> ools <u>H</u> elp			÷
) 🏠 🦓 http://localho	ost:8080/alfresco/faces/jsp/wizard/new-rule/action.jsp	🔹 📀	G
e My Home	R	②Help Logout 📴▼	٩
Company Home > Projects >	Project Voodoo > Documentation > Drafts	A de	
Drafts Content Rules This view shows you	<b>\$</b> all the rules to be applied to content in this space,	Actions Create Rule	Filter Contents
Title →	Description Description	e 💷 🛛 Modified Date 💷	Actions
W All versioned	Make all content versioned Yes October 5, 200	05 5:13 PMOctober 5, 2005 5:13 회식 식 Page	PM
	arks Tools Help         Image: Second Secon	arks       Tools       Help         Image: Second Sec	arks Tools Help         Imarks Tools Help Logout         Imarks Tools Too

We also want to add a rule that applies a simple workflow to content in this space, so select *Create Rule* again. Going through the wizard, add an inbound rule with title 'All simple workflow', again with a condition of *All Items*. For the actions, select *Add simple workflow to item* and click *Set Values and Add* to fill in settings for the *Approve Flow*. For the name of the approve step, enter 'Request approval', leave the setting to the default of *Move* and then select the space where it should be moved – in this example, 'Pending Approval'. Finally, select *No* for providing a reject step and click *OK*.



You may click *Finish* at this point to complete the wizard. Now we have finished defining rules on the Draft space, we can navigate to the Pending Approval space to add the next step in the workflow. Click the *Close* button from the list of rules or select



*Documentation* from the location breadcrumb and navigate into Pending Approval. Again, select the *Manage content rules* action and define a simple workflow rule:

- 1. Select *Create Rule* and give it a title 'Add simple workflow';
- 2. Select *All items*
- 3. Select Add simple workflow to item
- 4. Add 'Publish' as the name for the approve step, leaving it as a *Move* and selecting the 'Published' space in Project Voodoo Documents
- 5. Say *Yes* to providing a reject step and enter 'Reject' as its name, again leaving it as a *Move* and then selecting the Draft space for it to be returned to.



We can then complete the rule. We do not need to add a rule to make all content versioned, since content should only normally be placed in here if it has been through the Drafts space, in which case it will versioned already. To see these rules in action, we need to add some content.

#### Using the Clipboard

We have a sample software overview document that was created as part of the template we based our project space on, which can be found in the Samples space within Documents. Navigate to the Samples space and the select the *Copy* action for 'system-overview.html' using the clipboard icon next to the scissors. This will place the item in the clipboard.



Alfresco Web Client - Mozilla Firef	02		
e <u>E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookmarks <u>T</u> ools <u>H</u> e	p		
» 🏠 🔾 🧿 📀 🔇	http://localhost:8080/alfresco/faces/jsp/browse/browse.jsp	۱	G
Firefox Help			
Company Home My Home	R	1 1 Help Logout	9
Shelf	Company Home > Projects > Project Voodoo > Documentation > Samples		
▼ Clipboard	Alfresco Samples This view allows you to browse the items in your space. Open Network Folder	Actions Create Space View Details Add Content More	View Details View Icon View Browse View
Recent Spaces		1	-1
Samples	Browse Spaces		
Documentation Pending Approval Drafts Project Voodoo Projects	Content items		N √Page lof1♭ №
V Shortcuts	Sharenin Aciviem'irrini № 9		N √ Page 1of 1 ⊬ H

Now navigate back to the Drafts space and select the *Paste* action in the clipboard. This will create a new copy of the content. If we use the *Cut* action for content, a reference to it is placed in the clipboard and the content remains in its original place until we use the *Paste* action, when it is then moved to the new location. The clipboard contents are not retained over login sessions, so if you cut some content and then logout, the content will stay where it was originally.



## **Collaborating with Other Users**

We want to work with other users on this project, so we are going to invite them to the Drafts space. From the More actions menu for the space, select the *Manage Space Users* option. This shows a list of users that have permission to work on content in the space.

3 Manage Invited User	s - Mozilla Firefox				
<u>File Edit View Go Bookr</u>	narks <u>T</u> ools <u>H</u> elp				100
SS 📀 🙆 🤇	) 🏠 🚷 http://loca	lhost:8080/alfresco/faces/jsp/browse/	browse.jsp	) 💿 🔹	G
🕘 Firefox Help					
Company Home	My Home			🚱 2 Help Logout	9
Shelf	Company Home > Projects	Project Voodoo > Documentation	> Drafts	66 North	
Clipboard	Drafts Manage Spa Manage the permiss	ce Users sions you have granted to users who a	occess your space.	Actions Privite	View User Details
Recent Spaces     Drafts	Users				Close
Documentation Project Voodoo	Name 😅	User Name 🛪	Roles @	Actions	

Choose the *Invite* action to invite a user to the space. This opens a page to select the users and the role they can play in the space. To choose a person we need to search for them and then pick them from the list along with their role and click the *Add* button. As there are not many users in the system, we can just click the *Search* button without giving any text to match their name against.





2. Click to add to list Add	
3. Selected users/groups and their role(s) Joe Bloggs (All) Remove	
To continue dick Next.	

Choose the user 'Joe' and add them with the 'All' role. When we click on *Next*, we are given the option to send the invited users an email telling them about being invited. As we haven't configured email, just select the *No* option and finish.

🖲 Invite Users - Notify	- Mozilla Firefox			_ 🗆 🗙
<u>File Edit View Go Bookn</u>	narks <u>T</u> ools <u>H</u> elp			
State 1 ( State	) 🏠 🦓 http://lo	calhost:8080/alfresco/faces/jsp/wizard/invite-users/invite.jsp	🔹 📀	
Firefox Help				
Company Home	My Home		Help Logout	٩
Shelf	Company Home > Project	ts > Project Voodoo > Documentation > Drafts		
<ul> <li>Clipboard</li> <li>Clipboard</li> <li>Recent Spaces</li> <li>Drafts</li> <li>Documentation</li> <li>Project Voodoo</li> <li>Projects</li> <li>Company Home</li> <li>paulhh</li> <li>▼ Shortcuts</li> </ul>	Constant Steps 1. Invite Users 2. Notify Users	s Wizard you to give other users access to your space. Step Two - Notify Users Notify the selected users. Do you want to send an email to notify the invited users? ③ Yes ○ No Subject: Work area for Project X Hi Body: Here's where we will be working Automatic text: You have been invited to 'Drafts' by Paul H You will have the role of: [role]	on the draft value of the draft	Finish Back Cancel
		To close this wizard and apply your changes click Finish.		

Click the Close button to return to the Drafts space.



## **Checking Out Content**

Since several people may collaborate to work on this content, we will do a "check out" of it to create a working copy, while locking the original. Select the *Check out* action for 'system-overview.html' – if you are not sure which icon does what action, hold your mouse over the icon and a tool tip should popup with its name. The check out action is a green downward arrow. This brings up dialog that gives us the choice of checking out the working copy to the same space as the original, or any other space. Some people like to work with one space that contains all their current work-in-progress, so may have created a specific folder in their home space for working copies. We are just going to keep the working copy in the current space.



Clicking the *Check Out* button takes us to a page where we can choose to download the content for editing in some other program. Clicking *OK* takes us back to a view of the space, now containing 2 items.

Alfresco Web Client - / jle Edit <u>V</u> iew <u>G</u> o Bookma	Aozilla Firefox rks Iools Help		
32 O O	👔 🖓 http://localhost:8080/alfresco/faces/jsp/dialog/checkout-file-link.jsp	۱	) (G
Firefox Help			
Company Home	My Home 🙀 😨	Help Logout	٩
Shelf	Company Home > Projects > Project Voodoo > Documentation > Samples		
Clipboard  Recent Spaces  Samples	Alfresco Samples This view allows you to browse the items in your space. Open Network Folder	Actions Create Space View Details Add Content More	View Details View Icon View Browse View
Documentation Pending Approval Drafts	Browse Spaces		₩ 4 Page 1 of 1 ⊭ ሥ
Projects	Content items		
Shortcuts	System-overview (Working Copy).html	verview.html 🚲	<mark>∦</mark> ¶ A Page 1 of 1 k M



## **Checking In Content**

The lock icon against the original lets us know that we cannot change it. The only way we can modify it is to undo the check out on the working copy, or to "check in" the working copy. If there is a key on the lock it means we are able to check in or cancel the check out. We can see who has checked out the content by hovering the mouse over the lock. First we are going to edit the document and add some minor changes to the text. Once saved, we can now check in the content. Often, content will stay checked out for several days while someone makes their changes to it. It is possible to take a copy of the content onto the desktop and work with it off-line. If we do this, we can always upload any alterations to the working copy using the *Update* action (from the popup menu) without the need to check in.

🖲 Alfresco Web Client -	Mozilla Firefox			
<u>File E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookm	arks <u>T</u> ools <u>H</u> elp			1
S> O C	) 🏠 🛞 http://localhost:8080/alfresco/faces	s/jsp/dialog/checkout-file-link.jsp	۱	G
Firefox Help				
🇞 Company Home	My Home	08	②Help Logout ☐ ▼	٩
Shelf	Company Home > Projects > Project Voodoo > D	locumentation > Samples		
✓ Clipboard     ✓ Recent Spaces	Alfresco Samples This view allows you to browse the items in Open Network Folder	i your space.	Actions Create Space View Details	View Details View Icon View
Samples Documentation	Browse Spaces		More🍟	
Drafts Project Voodoo Projects	Content items			W ∜ Page 1 of 1 ♭ ♭W
▼ Shortcuts	system-overview (Working Copy).html	✓ K in ∞ in ≫	-overview.html 强	K 1 ⊟ ¥

Selecting the *Check In* action will overwrite the original with the updated working copy, making it available for people to edit it again. Make some changes by editing the content (pencil icon) and check in the content. If we had a more up-to-date copy of the content on our desktop, we could choose to upload it at this point and check it in. In this case we are just going to use the copy that is currently in the space, so just click the *Check In* button.



🕘 Check In File - Mozilla Firefox		
<u>File Edit View Go Bookmarks Tools H</u>	elp	
S. S. O C S. A	http://localhost:8080/alfresco/faces/jsp/browse/browse.jsp	🔹 🧕 🕼
😻 Firefox Help		
Company Home My Home		CHelp Logout
Shelf	Company Home > Projects > Project Voodoo > Documentation > Drafts	
▼ Clipboard	Check In 'system-overview (Working Copy) Check in your working copy for other team members to work with.	.html"
Recent Spaces	Check In options Version Notes	Check In Cancel
Samples Pending Approval Project Voodoo Projects	Check in changes and keep file checked out Working copy location Which copy do you want to check in?	
▼ Shortcuts	Use copy in current space     Use copy uploaded from my computer     1. Locate document to upload     Location:     2. Click upload     Upload	Browse

As the content is versioned, then the original content is still available to view from its version history. Select *View Details* for 'system-overview.html'.

#### Version History

We can expand and contract the version history block by clicking the triangle alongside *Version History*. The current version is also listed in the history.

🖇 - alisied inemuood 🖲	ozilla Firefox				
<u>Eile Edit View Go Bookn</u>	narks <u>T</u> ools <u>H</u> elp				
So O C	) 🏠 🧇 ht	tp://localhost:8080/alfre	sco/faces/jsp/dialog/document-details.jsp	ا 📀 📀	G
Firefox Help					
Company Home	• My Home			Help Logout	٩
Shelf	Company Home >	Projects > Project Vood	oo > Documentation > Samples > Drafts		
Clipboard  Recent Spaces	Drafts Details Location: / View the de	of 'system-over Company Home/Projects/ etails about the content.	<b>view.html'</b> Project Voodoo/Documentation/Drafts	Actions	Navigation Next Item Previous Item
Drafts Samples Documentation Project Voodoo Projects	Preview     View In Browser     Properties				Close
Shortcuts	Workflow     Category				
	Version Histor	γ.			
	Version 🔺	Author 🗇	Date 📾	Actions	
	1.0	paulhh	October, 5 2005 17:58	View ₩ 4 Page 1 of	1 14 14



## Sending Content for Review

Now that we are happy with our content, we can send it for review. Any workflow steps that are available for an item of content are shown in its actions, either from the popup actions available in the space view, or from the actions on the item's details view. In this example, the only available workflow step is *Request Approval*. Selecting this action will move the content to the Pending Approval space, so it no longer shows in the Drafts space.

Content items		
system-overview.html	∥҄҄҄҄҄҄ѧ҄҇҄҄҄а⊒⊟ѷ	
	슋 Update	
	Delete	🕅 🖣 Page 1 of 1 🖗 🕅
	📥 Request approval	

We can define a rule for all content with an action that will allow email alerts to be sent to people, which can be used in this case to let the appropriate person know that there is some content waiting to be approved. If we navigate to the Pending Approval space, we can see the 'system-overview.html' content. This time, if we look at the workflow steps available we see *Publish* and *Reject*, because the rule for this space added these steps when the content was moved here. Selecting the *Publish* action moves the content on to the Published space, whereas selecting the *Reject* action will send it back to the Drafts space.



## **Uploading and Transforming Content**

In this next example, we are going to define a transformation rule that will convert content added to a space into a different format. The scenario is that we need to re-use marketing content, which is available in PDF, within some of our software documents, so getting the basic text of the marketing content is very helpful. Navigate back to the Drafts space in Project Voodoo and select the *Manage Content Rules* action. Create a new rule named 'Transform PDFs' and select *Items which contain a specific value in its name* as the condition. For the condition setting, enter a pattern of '\*.pdf'.



On the action step, choose *Transform and copy content to a specific location* and for the action settings, select *Plain Text*. By default this is the only option unless you have OpenOffice installed (<u>www.openoffice.org</u>), which enables a wide range of transformations to be configured for use. Next select the destination space for the transformed content, in this case we will keep it in the Drafts space.



🧶 New Rule - Transfor	m - Mozilla Firefox		
Eile Edit View Go Book	marks <u>T</u> ools <u>H</u> elp		
3000	🕽 🏠 😪 http://localhost:8080/alfresco/faces/jsp/wizard/new-rule/act	ion-transform.jsp 🔹 😵 🧿 🕞	
Firefox Help			
Company Home	a My Home	Help Logout	Q
Shelf	Company Home > Projects > Project Voodoo > Documentation > Samples >	Drafts	
Clipboard	New Rule Wizard This wizard helps you create a new rule.		
Recent Spaces      Drafts     Samples     Documentation     Project Voodoo     Projects     Company Home	Set action values Required format: Plain Text Destination: Drafts To create the rule dick Finish.		OK Cancel

Finish the rule and we will return to the Drafts space. Now we can upload a file to exercise the rule. Select the *Add Content* action within Drafts and browse to a PDF file – a sample file is available in the Alfresco installation folder.

🖲 Add Content - Upload	l - Mozilla Firefox			
<u>File Edit View Go Bookm</u>	arks <u>T</u> ools <u>H</u> elp			0*0 0 0 0 0
Sb O O C	) 🏠 🛞 http://loca	lhost:8080/alfresco/faces/jsp/browse/browse.jsp	🔹 📀 🕼	
😻 Firefox Help				
Company Home	My Home		Help Logout	٩
Shelf	Company Home > Projects	> Project Voodoo > Documentation > Samples > Drafts		
<ul> <li>▼ Clipboard</li> <li>♥ Recent Spaces</li> <li>♥ Drafts</li> <li>♥ Samples</li> <li>♥ Documentation</li> <li>♥ Project Voodoo</li> <li>♥ Projects</li> <li>♥ Company Home</li> </ul>	Drafts Add Content This wizard helps you Steps 1. Upload Document 2. Properties 3. Summary	: Wizard pu to add a document to a space. Step One - Upload Document Locate and upload your document to the repository. 1. Locate document to upload Location: C:\demo\AlfrescoTest.pdf 2. Click upload Upload To continue click Next.	Browse	Next Finish Cancel

Select the *Upload* button and wait while the file is uploaded to the Alfresco server. A message will appear confirming the upload and then we can click the *Next* button.



🥴 Add Content - Uploa	l - Mozilla Firefox		
<u>Eile E</u> dit <u>V</u> iew <u>G</u> o <u>B</u> ookr	narks Iools Help		6*0 6 0 6 0
State 2 ( )	) 🏠 😪 http://localhost:8080/alfresco/faces/jsp/wizard/add-content/upload.jsp	🔹 📀	
Firefox Help			
Company Home	My Home	Help Logout	9
Shelf	Company Home > Projects > Project Voodoo > Documentation > Samples > Drafts		
Clipboard  Clipboard  Recent Spaces  Drafts Samples Documentation Project Voodoo Projects Company Home  Shortcuts	Steps       Step One - Upload Document         1. Upload Document       Locate and upload your document to the repository.         2. Properties       Locate document to upload         3. Summary       Locate document to upload         Upload       Upload         Image: Upload       Image:	Browse	Next Frish Cancel

We will get taken to the next step in the wizard, which has the same options as we completed for creating the content within the browser earlier. On finishing the wizard, we will be returned to the Drafts space, but there will be two new documents: the PDF and the text version of it.

narks <u>T</u> ools <u>H</u> elp			•**
) 🏠 🛞 http://localhost:8080/alfre	sco/faces/jsp/dialog/delete-file.jsp	۱ 📀 📀	G
My Home	•	🗿 🕐 Help Logout	٩)
Company Home > Projects > Project Vood	doo > Documentation > Samples > Drafts		
Alfresco Drafts This view allows you to browse the Open Network Folder	items in your space.	Actions Create Space	View Details View Icon View Browse View
Browse Spaces			W ∢ Page 1of 1 ⊬ ₩
Content items	∕ న ెు≘ళ 🛐 Alfres	xcoTest.txt	/ & @ ~= 2
	arks Tools Help	arks       Tools       Help         Image: State of the stat	arks Tools Help         Image: Start S



### **Categories and Advanced Search**

One of the other features of Alfresco is the ability to assign categories to items. This allows information to be classified in any number of different ways. With this, we can retrieve items that match combinations of constraints, including categories. The smart thing that categories provide is that they are aware that they are hierarchical, so searching for an item in a higher-level category will also find anything classified below it. In the following example, we are going to add some content to a category and then search for it.

The first step is to make the content able to be categorized, which can be done through the content's properties page. Navigate to the Published space and select the *View Details* action for 'system-overview.html' (one of the icons next to the content, not the space details). If we expand the *Category* block and if the item is not categorized, we can select the *Allow Categorization* action. Now we can choose the *Change Category* icon in the right-hand corner of the block, which opens a view to allow a category to be selected. Select through 'Software Document Classification', 'Software Descriptions', 'Main Software Descriptions' and select 'Short System Description'.



As we can put this content in any number of categories, we need to click 'Add to List' even though we are only going to set one category.



Edit Categories - Mozilla Firefox Ele Edit View Go Bookmarks Tools H Con O O O C C C C C C C C C C C C C C C C	elp & http://localhost:8080/alfresco/faces/jsp/dialog/edit-category.jsp 🛛 🔌 🧿 /	G
Company Home My Home Shelf	Company Home > Projects > Project Voodoo > Documentation > Published	<u> </u>
<ul> <li>▼ Clipboard</li> <li>▶ system-overview.html</li></ul>	Published Modify categories of 'system-overview.html' Set the category for the document then click OK.         1. Select a category: Select         Categories:       2. Add to List Selected Categories: Short System Description Remove	CK Cancel

We can now use the advanced search to try and find this content. The advanced search page is opened from the popup menu in the toolbar search. When we enter text in the toolbar search, it will search throughout all available spaces, although we can constrain it to just find the text in names or also the content. Select the *Advanced Search* option.

🕘 Document Details -	Mozilla Firefox		
File Edit View Go Boo	kmarks <u>T</u> ools <u>H</u> elp		()
SS () ()	🔵 🏠  📽 http://localhost:8080/alfresco/faces/jsp/dialog/document-details.jsp		* 🧿 🖸
Firefox Help			
Company Hon	ne My Home	🛛 🚱 🕐 Help Logout 🛛	
Shelf	Company Home > Projects > Project Voodoo > Documentation > Published		All Items     OFile names and contents
Clipboard	Published Details of 'system-overview.html' Location: /Company Home/Projects/Project Voodoo/Documentation/Published View the details about the content.	3	OFile names only     OSpace names only     Advanced Search
Recent Spaces			) )

From this page there are a number of options available, beyond what text to search for. It is possible to specify the starting space for the search, so that only content beneath that space is searched. In this example, we will look for the text 'system' - clicking the *Search* button will start the search. We will get a list of all content that has 'system' in its name, or somewhere in its content.





The *Details View* is usually the best for viewing search results. Also, if we view an item's details, we can navigate through the results using the Next Item and Previous Item navigation actions.

<u>Eile Edit View Go B</u> ookma								
	arks <u>T</u> ools <u>H</u> elp							
Sd 🖸 🔇	) 🏠 🦓 http://localhost:808	80/alfresco <mark>/</mark> faces/jsp/dial	og/delete-file.jsp		_		0	G
🕑 Firefox Help								
Company Home	My Home			19	Help	Logout	•	6
Shelf	Company Home > Projects > Project	t Voodoo > Documentat	ion > Published					
✓ Clipboard     ✓ Recent Spaces	Alfresco Search Results Search for "system" results s This view allows you to see t	hown below he results from your sea	rch.			Action Close	ons Search	View Details View Icon View Browse View
Published	Browse Spaces							
Drafts	Name 🛩	Description	Path	Crea	ted 😅	Modi	fied 🛥	Actions
Projects	Content items							
Charten da	Name 🛩	Description 🖨	Path 😑		Size 💷	Created 👄	Modified	Actions
Shortcuts	📩 Alfresco-Tutorial.pdf	Getting started guide	/Company Home/Alfr	esco Tutorial	2.5 MB	October, 5 2005 17:49	October, 5 2005 17:49	/ X 0 ~ = = *
	📩 AlfrescoTest.pdf		/Company Home/Proj Voodoo/Documentati	jects/Project on/Drafts	52.05 KB	October, 5 2005 18:19	October, 5 2005 18:19	୵୷ୖ୲ଵୖୖୖୖ୶
	system-overview.html		/Company Home/Dat Dictionary/Space Templates/Software Project/Documentatio	a Engineering on/Samples	0.54 KB	October, 5 2005 17:49	October, 5 2005 17:49	/ ↓ □ ⊲ ⊟ थ
	system-overview.html		/Company Home/Proj Voodoo/Documentati	jects/Project on/Samples	0.54 KB	October, 5 2005 17:52	October, 5 2005 17:52	



Show me results in the categories			
Software Descrip	otions		
Include sub-c	ategories		
Add to List	Add to List		
Category	Include sub-categories		
Software Descriptions	Yes	Â	

We can also choose a category in which the content must be in to be found. Run the search again, but set it to look only for content in the 'Software Descriptions' category. For this example, we only have one document that matches this, because 'Short System Description' is within the 'Software

Descriptions' category. If we were to choose a different category, such as 'Development Plans', then no content would be found. We can also include other options for the search, such as the kind of document we are looking for, or a range of dates for its creation or modification.

More search options				
Content Type:	Content 💟			
Content Format:	All Formats			
Title:				
Description:				
Author:				
Modified Date:				
From: 31 💟 J	anuary 💟 2006 💟			
To: 31 💟 J	anuary 💟 2006 💟			
Created Date:				
From: 31 💟 J	anuary 💟 2006 💟			
To: 31 💟 J	anuary 💟 2006 💟			
Additional options				



### **Forums and Discussions**

Alfresco provides an easy way for people to collaborate using forums and discussions. Forums contain *topics* of discussion and topics contain *posts* from different users. A forum space is used to contain a collection of forums, so the first step needed is to use the New Space Wizard to create a forum space.

🕘 New Space - From Sc	ratch - Mozilla Firefox			
<u>File Edit View Go Bookn</u>	narks <u>T</u> ools <u>H</u> elp			() ()
So C C	) 🏠 🏶 http://loca	alhost:8080/alfresco/faces/jsp/wizard/new-space/create-from.jsp 🛛 🗳	) 🗿 🖸	
Firefox Help				
Company Home	My Home	🚱 ②Help 🔂 Logout (admin)	3-	Q
Shelf	Company Home			
Clipboard	Company Home New Space This wizard helps	Wizard vou to create a new space.		
Recent Spaces	Steps 1. Starting Space 2. Space Options	Step Two - Space Options Select space options.		Next Back
▼ Shortcuts	3. Space Details 4. Summary	Space Type Select the type of space you want to create.		Cancel

A forum space can contain any number of forums, or even other forum spaces if wanted. Select the Create Forum action a forum.

🥹 Forum Space - Mozilla Fire	ifor:		
<u>File Edit View Go B</u> ookmarks	<u>T</u> ools <u>H</u> elp		0
Sol () () () () () () () () () () () () ()	👔 🛞 http://localhost:8080/alfresco/faces/jsp/forums/create-forum.jsp	ا 📀 😵	G
🕑 Firefox Help			
Company Home My H	iome 😽 @H	elp 🔁 Logout (admin)	]9
Shelf	Company Home > My Forums > Open Source Software		
▼ Clipboard	Forum Space Open Source Software This view allows you to browse forum spaces and forums.	Actions Create Forum Space Create Forum	View Details View Icon View
Recent Spaces     Open Source Software	General discussion on Open Source Software	View Details More≱	Browse View
My Forums Company Home	Browse Forum Spaces and Forums		
V Shortcuts	Discussions on CMS		
		Page	1 of 1 🕅 🖣 <b>1</b> 🕨 🅅

From within a forum, select the Create Topic action to add a new topic and the first post to it. You can choose a different icon for the post to highlight the type of posting.



Create Topic - Mozilla Firefox Elle Edit View Go Bookmarks Iools Help		
Sho	ttp://localhost:8080/alfresco/faces/jsp/forums/forum.jsp	🔊 🧿 (G
Company Home My Home	📔 🖉 Help 🕞 Logout (admin) 🌘	E-
Shelf	Company Home > My Forums > Open Source Software > Open Source Content Management	
♥ Clipboard	Open Source Content Management Create Topic Enter information about the new topic then click Create Topic.	
Recent Spaces		
Open Source Content Management Open Source Software My Forums Company Home	Topic Properties         Subject:       Alfresco?         Choose icon:       Image: Choose icon:	Create Topic Cancel
▼ Shortcuts	Message I've heard that Alfresco is great - does anyone have any pointers to how I get	
	started easily? Message:	

Once a post is created, it is always possible to edit and change it, or even delete it (the icons on a post determine what actions you are allowed to take).

🧶 Topic - Mozilla Firefox		
<u>File Edit View Go Bookmarks Tools Help</u>		A 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
So So So So 🔊 🐼 🕷	nttp://localhost:8080/alfresco/faces/jsp/forums/create-topic.jsp	* 🧿 🖸
😻 Firefox Help		
Company Home My Home	R	PHelp Cogout (admin)
Shelf	Company Home > My Forums > Open Source Software > Open	Source Content Management > Alfresco?
Clipboard  Recent Spaces  Alfresm2	Topic Alfresco? This view allows you to browse posts in this topic.	Actions     View       Post to Topic     Details View       Image: Straight of the straight of
Open Source Content Management Open Source Software My Forums Company Home	Browse Posts Post: Alfresco? On: January, 31 2006 18:12 admin Tve heard that Alfresco is great - does anyone have	e any pointers to how I get started easily?
Shortcuts		Page 1 of 1 4 4 1 0 04

Now any other user with the right permissions will be able to reply to the post (using the green reply icon). By default, the most recent post is at the top, but this can be changed.







Discussions are just like a forum attached to a piece of content. Where ever the document is moved, the discussion goes with it. They provide an ideal way to record decisions or annotations about a document without changing the content. To start a discussion on an item, select the Start Discussion action from its more actions menu. Once a discussion has been started, other additional topics for discussion can be added later.



It is easy to see whether there is a discussion on an item, as an icon action to view the discussion is shown alongside it in the space view.



If you check out a document that has a discussion, the working draft will not automatically have one, but you can start a discussion on it. When the working copy is checked in, then any discussions on it are added to those in the original discussions (with a date stamp). While content is checked out, the original content is locked, but discussions can still continue on it.



## Summary

We have meandered around much of the Alfresco system, with a view to giving you some ideas about the approaches Alfresco is taking to managing content. The functionality of the system will be expanded considerably over the following months, providing an ever growing list of Enterprise Content Management features.