



# Alfresco in an Hour



Michael  
Farman

[www.alfresco.com](http://www.alfresco.com)



# Agenda

- Introduction
- User Interface
- The Basics
  - Spaces and Content
  - Creating and Editing Content
  - Permissions
  - Searching
- Collaboration
  - Versioning
  - Check in/out
  - Forums and Discussions
- Automating Tasks
  - Rules and Actions
- Simple Workflow
- Demonstration
- Further Information
- Q and A



## What does it do?

- A system for organizing and facilitating collaborative creation of documents and other content
- Able to monitor content through its lifecycle, and track changes to content, and users of the content
- Content sharing, security, versioning, content lifecycle management, workflow, collaboration, email notifications, dashboards....
- Access – Alfresco Web Client, FTP, WebDAV, CIFS (network share)  
– no client software installation necessary
- Alfresco Web Content Management
  - Authoring, Virtualisation, Staging and Deployment for Web Site Management



# Community or Enterprise?

- Community

- Functionally Equivalent
  - Same Code Base
- Basic Testing
- May have bugs
- 'Major releases only'
- Support via Forums
  - No SLA

- Enterprise

- Functionally Equivalent
  - Same Code Base
- Rigorous QA and Fixes
- Production Quality
- Maintenance Releases
- Supported
  - Guaranteed SLA
  - Email
  - Telephone
  - Developer (Option)
- Alfresco Connect for Enterprise (ACE)\*

\* Available Q3 07



# Where do I get it?

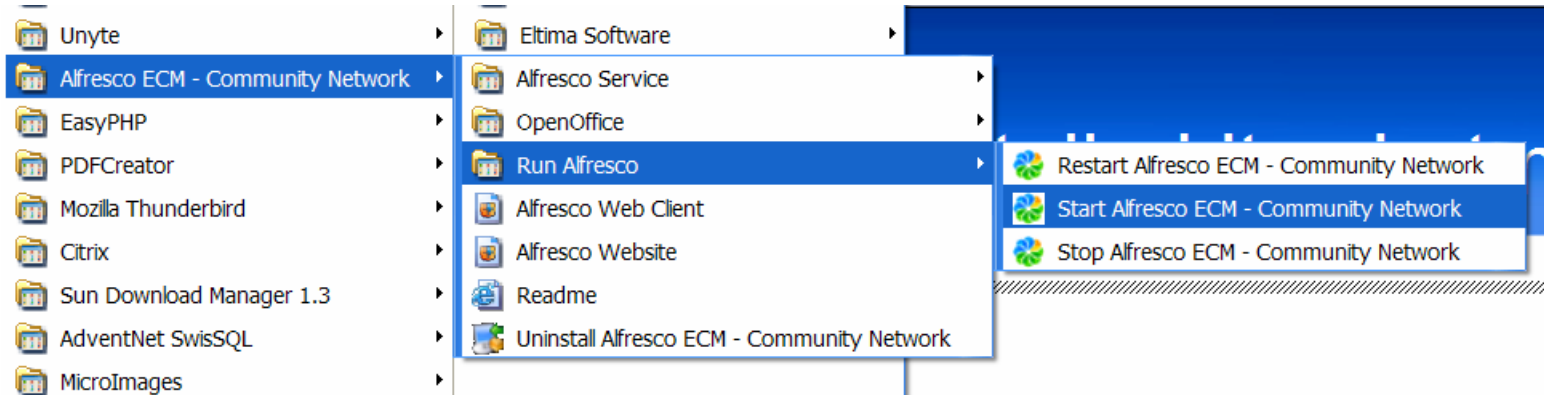
- Installers for Windows & Linux
  - AlfrescoCommunity-2.0-Setup.exe
  - AlfrescoCommunity-2.0-Linux-x86-Install
  - Includes: Alfresco, Tomcat, JDK, Database (HSQL DB) and OpenOffice
- Self Contained Bundles
  - alfresco-community-tomcat-2.0.0.zip
  - alfresco-community-tomcat-2.0.0.tar.gz
  - Includes: Alfresco, Tomcat and Database (HSQL DB)
  - Download JDK, OpenOffice (Optional) Separately
- Community
  - Links from [www.alfresco.com](http://www.alfresco.com)
  - SourceForge Downloads
- Enterprise
  - Register at [www.alfresco.com](http://www.alfresco.com)
  - Hosted Trial
    - 30 Days
    - Followed by 30 days read only
    - Email Support: [support@alfresco.com](mailto:support@alfresco.com)
  - Enterprise Trial
    - 30 Days
    - All Clients
    - Same bundles as Community
    - Email Support: [support@alfresco.com](mailto:support@alfresco.com)



# Starting and Stopping

- Starting

- Self Contained Installer:



- Bundle

- alf\_start.bat
- alf\_stop.bat

Name	Size	Type	Date Modified
alf_data		File Folder	25/06/2007 11:45
bin		File Folder	25/06/2007 11:42
extras		File Folder	25/06/2007 11:42
licenses		File Folder	25/06/2007 11:42
tomcat		File Folder	25/06/2007 11:42
alf_start.bat	1 KB	MS-DOS Batch File	28/06/2006 18:31
alf_stop.bat	1 KB	MS-DOS Batch File	28/06/2006 18:31
alfresco.bat	3 KB	MS-DOS Batch File	23/02/2007 20:31
alfresco.log	4 KB	Text Document	25/06/2007 12:32
README.txt	7 KB	Text Document	05/02/2007 23:59
README_mysql.txt	3 KB	Text Document	05/02/2007 23:59



# Login in for the first time

- WebClient Login URL
  - <http://localhost:8080/alfresco>
- User Name: admin
- Password:admin
- Note: Guest Login first time

Click here to logout as guest

The screenshot shows the Alfresco WebClient interface. At the top, there is a navigation bar with the Alfresco logo, 'My Home', and 'My Alfresco'. To the right of the navigation bar, there are several icons and a search bar. A red box highlights the 'Login (guest)' button, and an arrow points from the text 'Click here to logout as guest' to this button. Below the navigation bar, there is a 'Navigator' sidebar with 'My Alfresco' and 'My Home' options. The main content area is titled 'My Alfresco Dashboard' and contains a 'Getting Started' section with 'Alfresco' and 'Common Tasks' sub-sections.





# Introducing the Web Client

Toolbar

Breadcrumb

Shelf

Header

Detail

The screenshot shows the Alfresco web client interface. At the top, there is a navigation bar with links for 'Company Home', 'My Home', 'Guest Home', and 'My Alfresco'. To the right of the navigation bar are utility icons for 'Raise an Issue' and 'Logout (admin)', along with a search box. Below the navigation bar is a 'Shelf' sidebar on the left, which contains sections for 'Clipboard', 'Recent Spaces' (listing 'Company Home' and 'Guest Home'), and 'Shortcuts'. The main content area is titled 'Company Home' and includes a description: 'This view allows you to browse the items in this space. The company root space'. It features a 'Browse Spaces' section with three items: 'Data Dictionary' (User managed definitions, 30 October 2006 11:17), 'Guest Home' (The guest root space, 30 October 2006 11:17), and 'Users' (30 October 2006 13:15). Below this is a 'Content Items' section displaying two documents: 'Guide to Clustering Alfresco-1.3.doc' (423 KB, 30 October 2006 13:18) and 'ProductUpdateRelease1 4 FINAL.pdf' (50.04 KB, 30 October 2006 13:15). Each item has a set of action icons. The interface is annotated with colored boxes: a red box highlights the 'Shelf' sidebar, a yellow box highlights the 'Company Home' header, a green box highlights the 'Browse Spaces' section, and an orange box highlights the 'Content Items' section.

Hover over an item for a hint of what it does





# My Alfresco Dashboard

- Personalised View

- Dashlets

Getting Started

**Alfresco**

- Demonstration**  
Watch a demonstration of how Alfresco can be used to create a marketing launch.
- Feature Tour**  
Take a tour of some of the key features in Alfresco.
- Online Help**  
Click the help icon to display Alfresco Help topics.

**Common Tasks**

- Browse items in your home space**  
From the toolbar click My Home to display a list of items in the space.
- Create a space in your home space**  
Navigate to your home space. In the space info area, from the menu under Create, click Create Space and enter information about the space.
- Add content to your home space**  
Navigate to your home space. In the space info area, click Add Content and enter information about the content to be uploaded.
- Create content in your home space**  
Navigate to your home space. In the space info area, click Create Content under Create and enter information about the content to be created.

My Tasks To Do

Description	Type	Id	Created	Due Date	Status	Priority	Actions
Adhoc Task	Adhoc Task	4	30 October 2006 14:38		Not Yet Started	2	
HR Process 01	Review	2	30 October 2006 14:37		Not Yet Started	2	

Page 1 of 1

My Completed Tasks

Description	Type	Id	Created	Completed on	Outcome	Actions
Start Adhoc Task	Start Adhoc Task	3	30 October 2006 14:38	30 October 2006	Task Done	

Page 1 of 1

My Documents

Name	Size	Modified Date	Locked By
ProductUpdateRelease1 4 FINAL.pdf	51.24 KB	30-Oct-2006 14:28:37	
Sony Erikson W850i black.jpg	1525.08 KB	30-Oct-2006 14:30:12	
Guide to Clustering Alfresco-1.4.doc	433.15 KB	30-Oct-2006 14:40:35	

My Checked Out Documents

Name	Size	Modified Date	Location
DemoViewConfig.java	45.14 KB	30-Oct-2006 14:34:48	/Company Home/Users/svn

My Images



Sony Erikson W850i black.jpg



# What is a Space?

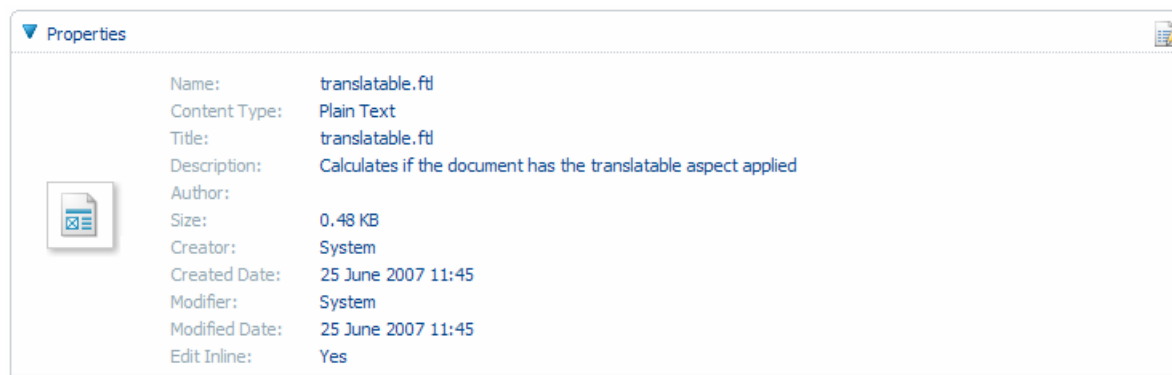
- Just like a folder, but more
- Can hold any type of content
- Give a description and choose an icon
- Add sub-spaces and content
- View/Modify details about a space
- Smart Spaces
  - Rules
  - Work with other users Map to Windows network folder

The screenshot displays the Alfresco web interface. At the top, there is a navigation bar with links for 'Company Home', 'My Home', 'Guest Home', and 'My Alfresco'. To the right of the navigation bar are utility icons and a search box. Below the navigation bar is a 'Navigator' sidebar on the left, showing a tree view of spaces: 'Company Home', 'Data Dictionary', 'Guest Home', 'Marketing', and 'User Homes'. The main content area is titled 'Company Home' and contains a description: 'This view allows you to browse the items in this space. The company root space.' Below this, there is a 'Browse Spaces' section with a grid of four space cards: 'Data Dictionary' (User managed definitions, 25 June 2007 11:45), 'Guest Home' (The guest root space, 25 June 2007 11:45), 'Marketing' (Corporate Marketing Information, 25 June 2007 11:52), and 'User Homes' (User Homes, 25 June 2007 11:45). Each card includes a folder icon, a title, a description, a timestamp, and a set of action icons (cut, copy, paste, delete, refresh). At the bottom of the main content area, there is a pagination control showing 'Page 1 of 1'.



# What is Content?

- Often can be thought of as a file or document
- Made of two main elements
  - The “content” itself
  - Information about the content (meta-data)
- Content
  - Anything: documents, video, audio, images, XML, HTML
- Properties
  - Format, language, creator, dates
  - Classifications
  - Links to related content
    - Translations
    - Different formats (e.g. PDF, HTML, Text)
    - OCR'd text of scanned image



A screenshot of a file's properties dialog box. The title bar reads "Properties". On the left is a document icon. The main area contains the following metadata:

Name:	translatable.ftl
Content Type:	Plain Text
Title:	translatable.ftl
Description:	Calculates if the document has the translatable aspect applied
Author:	
Size:	0.48 KB
Creator:	System
Created Date:	25 June 2007 11:45
Modifier:	System
Modified Date:	25 June 2007 11:45
Edit Inline:	Yes



# Creating and Editing Content

- HTML or plain Text created and edited in-line
  - WYSIWYG editor in the browser
- Upload content
  - Select file from user computer in the browser
  - Network folders, FTP and WebDAV
- Download from Alfresco to user computer
  - Standard browser feature, choose where to save
  - Network folders, FTP and WebDAV
- Update documents by uploading changed file
- Edit Microsoft Office documents directly



- Inviting Users
- Permission Groups

Consumer	Editor	Contributor	Collaborator	Coordinator	
☺	☺	☺	☺	☺	View all spaces and content
	☺		☺	☺	Update/Edit content
		☺	☺	☺	Add new content
	☺		☺	☺	Edit properties
				☺	Invite others
				☺	Take ownership



# Searching Content

- Combined search of both contents and properties
- Full-text search
  - Any words in content, regardless of format
  - Best-match based on number of matched words
- Property constraints
  - By category
  - Between dates
  - Custom properties
- Path constraints
  - Only content below a given space



**Advanced Search**  
Perform a more detailed search of the repository.

Reset All My Saved Search Options Select a Saved Search...

Look for:

**Show me results for**

- All Items
- File names and contents
- File names only
- Space names only

**Look in location**

- All Spaces
- Specify Space:  
[Click here to select a Space](#)
- Include child spaces

**Show me results in the categories**

**More search options**

Folder Type:

Content Type:

Content Format:

Title:

Description:

Author:

Modified Date:

From:

To:

Created Date:

From:

To:

**Additional options**

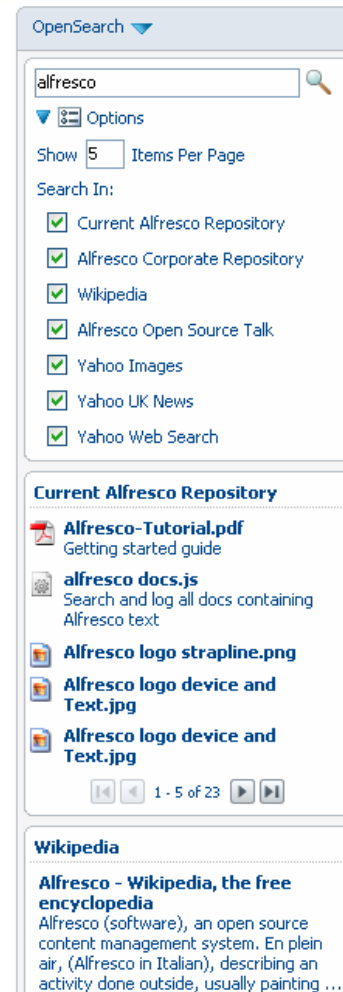
Search Close





# OpenSearch

- Standard Interface
- Client
  - IE7 and Firefox
- Server
  - Alfresco Repositories
  - 3<sup>rd</sup> Party Applications
  - Shelf and My Alfresco Dashlet
- One Interface for all Searches
  - Google
  - eBay
  - Wikipedia
  - Alfresco
- Auto-Discovery
- Language Aware
- For setup details see:
  - <http://wiki.alfresco.com/wiki/OpenSearch>



**Alfresco as an OpenSearch Server**



**Alfresco as an OpenSearch Client**





# Forums and Discussions

- Forum spaces may be defined to contain Forums
  - Using Advanced Space Wizard 'From Scratch'
- Forums may also be associated with spaces and content items
  - Using the "Start Discussion" action
  - Discussions move with the item
- Forums contain Topics which contain Posts
- Posts may have Replies
- Searchable

The screenshot shows a forum discussion page with the following details:

- Breadcrumb:** Company Home > Data Dictionary > Space Templates > Software Engineering Project > Discussions > Content Management Services.pdf discussion > PHP Libraries
- Page Title:** PHP Libraries
- Subtext:** This view allows you to browse posts in this topic.
- Actions:** Create, More Actions, Bubble View
- Section:** Browse Posts
- Post 1:** PHP Libraries Reply to: admin On: 16 February 2007 16:48. Content: "I'd like to some some details on Web Services".
- Post 2:** PHP Libraries On: 16 February 2007 16:48. Content: "We also need to discuss BPEL with regard to Web Services".
- Post 3:** PHP Libraries On: 16 February 2007 16:47. Content: "We need to reference where the PHP Library can be accessed and downloaded".
- Footer:** Page 1 of 1



# Using Versioning



- Allows a history of previous versions of an item to be kept
- A new version is created when content is saved, by default
- An item needs to be “versionable” for versions to be kept
  - Individually, via smart spaces, by type or globally
- An example of an “aspect”
- Can look at version history, view previous versions of content – future, revert to version
- Content id always points to the most recent version






# Check In and Check Out

- Check Out locks the item and creates a working copy which can be edited (content and details)
- Everyone else can just view the item
- Check In replaces the original item with the working copy and releases the lock

 **general\_example (Working Copy).ftl**  
Example of various lists of documents, spaces and summary information about the current user  
1.57 KB  
25 June 2007 14:32  


 **general\_example.ftl**   
Example of various lists of documents, spaces and summary information about the current user  
1.57 KB  
25 June 2007 14:32  


Company Home > Work in Progress

 **Check In 'Quality Management System - Guidance (Working Copy).doc'**  
Check in your working copy for other team members to work with.

**Check In options**

Version Notes  
Updated introduction and TOC

Minor Change  
 Check in changes and keep file checked out

**Working copy location**  
Which copy do you want to check in?

Use copy in current space  
 Use copy uploaded from my computer

1. Locate document to upload  
Location:

2. Click upload



# Rules and Actions - Conditions

- Rules are applied to a 'Space'
- Rules make a space 'Smart'
- Rules are triggered by an Event
  - Inbound - content arriving into a space
  - Outbound – content leaving a space, moved, deleted
  - Update – content being modified

- Rules are filtered based on conditions

- All Items (no filter)
- Items with a specific MIME Type (e.g. .pdf)
- Specific Content Type Applied to a specific aspect File name pattern (e.g. \*-context.xml)
- Falls within a Category (e.g. Region, Language)

- Rule filter can be applied to 'NOT'
  - e.g. not in MIME Type \*.pdf

- No limit on the number of conditions that can be applied to each rule

Company Home > Quality Management > Documentation > Work in Progress

### Content Rules

This view shows you all the rules to be applied to content in this space.

Create Rule More Actions Inherited

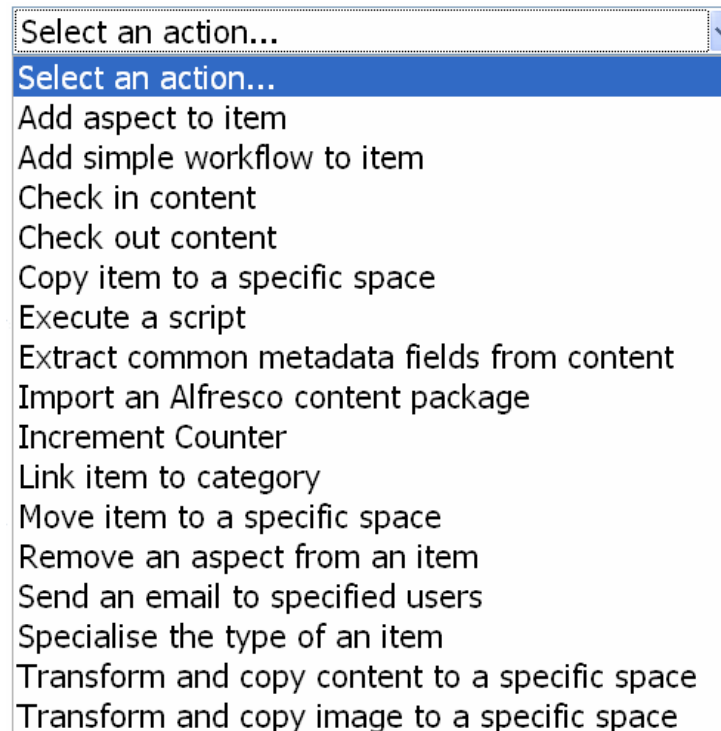
Title	Description	Local	Created Date	Modified Date	Actions
Update Status Property	Auto update status property on the status aspect	Yes	September 8, 2006 10:28 AM	September 8, 2006 10:28 AM	🗑️ ⚙️
Send for Review	Applies the review workflow to incoming Word documents	Yes	September 8, 2006 10:30 AM	February 12, 2007 10:07 PM	🗑️ ⚙️
Make Versionable	Applies the Versionable aspect to Yes inbound Word Documents	Yes	September 8, 2006 10:31 AM	September 8, 2006 10:31 AM	🗑️ ⚙️
Apply Approval Workflow	Apply Approval Workflow on Update	Yes	February 12, 2007 10:34 PM	February 12, 2007 10:34 PM	🗑️ ⚙️

Page 1 of 1



# Rules and Actions - Actions

- Items that successfully meet the rule conditions have an 'Action' applied to them
- Actions can triggered to run manually
- No limit on the number of Actions per rule
- Rules are used to organise, structure, enrich content in the repository
- Used in conjunction with:
  - Alfresco Web Client
  - FTP
  - WebDAV
  - CIFS (Shared Network Folder)
  - Web Services API
  - Use your imagination





# Simple Workflow

- Special case of a Rule
- Applies automated management of document lifecycles
- Moves / Copies content based on user actions

## Set action values

### Approve Flow

Name for approve step:

Choose whether you want to move or copy the content and also the location.

Move  Copy To:

### Reject Flow

Do you want to provide a reject step?

Yes  No

Name for reject step:

Choose whether you want to move or copy the content and also the location.

Move  Copy To:



# Space Templates

- Re-useable templates of spaces and content
- Create a library of standard projects
  - Different types of projects have different structures
  - Standardized documents
  - Standardized management
- Create a template in the same way as a space
  - Add sub-spaces and content
- Create spaces based on other spaces







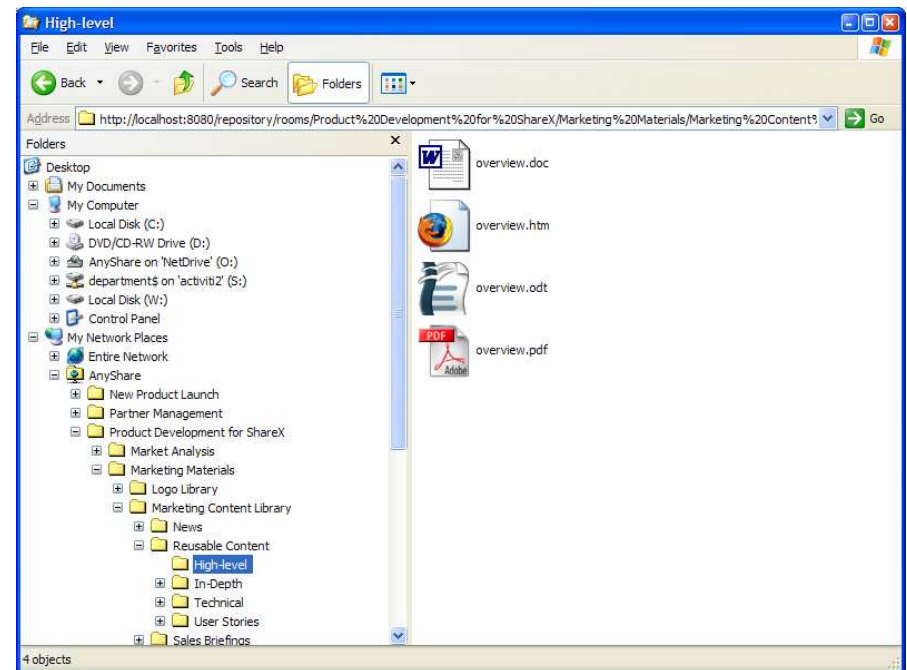
# Accessing Content Without The Alfresco Client

- CIFS

- Root URL: `\\<machine name>_A\Alfresco`
- Same as a network share folder
- Can mount as a share drive
- Drag and Drop files into Alfresco
- Edit content directly with other programs
- Network folders can be smart spaces
- Provides user with a link to the same space in the web client

- FTP/WebDAV/CIFS

- All rules are applied
- All permissions are enforced
- If versioning is enabled, then content will be versioned





# Alfresco in Action

- Demonstration





## Further Information

- Content Community
  - <http://www.alfresco.com>
  - AMPs, Documentation, Tutorial, Tech Tips
- Alfresco Wiki
  - Technical information on configuration, administration and customisation
  - <http://wiki.alfresco.com>
- Alfresco Forums
  - Community Postings
  - Alfresco Staff
  - <http://forums.alfresco.com>
- Alfresco Forge
  - Contributions from the community
    - E.g. Metadata extractors, transformations ....
  - <http://forge.alfresco.com>



Q and A

# Alfresco in an Hour





Thank you for Attending

# Alfresco in an Hour

Michael  
Farman

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