Getting Started with Share for Alfresco Community Edition 3.2

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Contents

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Typographic conventions

The following typographic conventions are used in this guide:

Bold
User Interface elements

`Mono-spaced font`
Text the user types

Get started

In today's workplace, individuals spend most of their time working on teams. To collaborate effectively, they need tools to facilitate communication, share information, and run projects. Alfresco Share provides these tools.

The *Getting Started with Share* tutorial introduces the basic concepts to accompany the download of Share for Alfresco Community Edition 3.2. It takes you through a scenario to demonstrate the flexibility Alfresco Share provides for working in a collaborative team environment.

Alfresco recommends you walk through this guided tutorial to familiarize yourself with the features.

Scenario

For this tutorial, you will be walking through the following scenario.

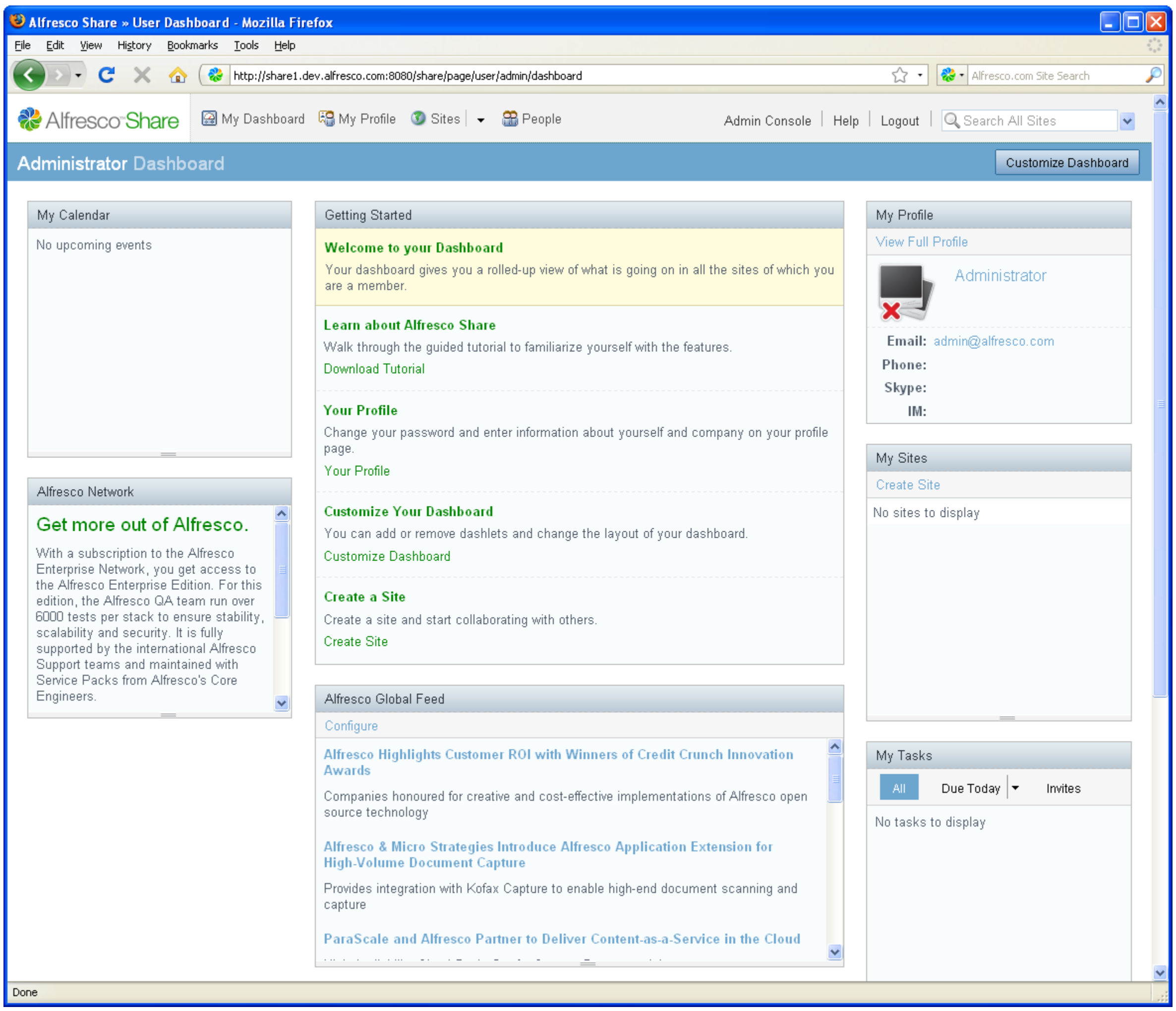
You will:

- Set up your personal dashboard and add your credentials
- Create a collaboration site for your team
- Prepare the site for collaboration with other users
- Invite users to the site
- View the site activities

Log in

Log in to Alfresco Share using the default credentials.

1. Type the following on the login page:
   a. **Username**: `admin`
   b. **Password**: `admin`
2. Click **Login**.
   On entering the application, your personal dashboard displays.



You track all information relevant to you on your personal dashboard.

About dashlets

My Dashboard is where you track all information relevant to you.

Your dashboard consists of personal dashlets. A dashlet is a summary component that may or may not have an equivalent page component. If there is a complementary page component, the related dashlet displays the information generated from it. Dashlets only appear on the personal or site dashboards. The following personal dashlets are available.

Getting Started
The **Getting Started** dashlet gives you options to get started when you access Share for the first time. Once you are familiar with Share, you can remove it. This dashlet displays by default.

My Calendar
Your **My Calendar** personal dashlet contains a rolled up view of events that you have created as well as events for each site of which you are a member, providing quick access to each of them. This dashlet displays by default.

RSS feed
By default, the **RSS Feed** personal dashlet displays all Global Alfresco RSS feeds. You can configure it to personalize your feeds. You can also add and configure as many instances of this dashlet as you want. This dashlet displays by default.

Alfresco Network
The **Alfresco Network** dashlet is the portal for Alfresco customers to get all the latest news and views, as well as the following:

- A knowledge base
- Ability to track your tickets
- Check in notices
- Documentation
- Downloads
- Alfresco Calendar

It provides a feed to the latest activities on the Network. This dashlet displays by default.

My Sites' Activities
Your **My Sites' Activities** personal dashlet tracks the most recent activities that have been performed in any site of which you are a member. This dashlet displays by default.

My Profile
Your **My Limited Profile** personal dashlet contains summary personal details about you, based on your detailed profile. This dashlet displays by default.

My Sites
Your **My Sites** personal dashlet lists all sites that you have created or of which you are a member, providing quick access to each of them. This dashlet displays by default.

My Tasks
Your **My Tasks** personal dashlet displays any tasks you have on any of your sites. This dashlet displays by default.

Content I'm Editing
Your **Content I'm Editing** personal dashlet displays the last three Document Library content items, Blog posts, Wiki pages, and Discussion forum posts that you edited.

CMIS Feed
Your **CMIS Feed** dashlet displays links specific to the Content Management Interoperability Services (CMIS) specification and implementation.

Web View
Your **Web View** dashlet, by default, displays the Alfresco website but can be configured to display any website.

My Workspaces
Your **My Workspaces** dashlet displays all Document Workspace sites of which you are a member, providing quick access to each of them.

My Documents
The **My Documents** dashlet enables you to view files from all Document Libraries that may be of particular interest to you, organized into three categories: Favorites, I'm Editing, and I've Modified.

You can click **My Dashboard** in the application toolbar from anywhere in Share to return to your personal dashboard.

Set up your personal dashboard

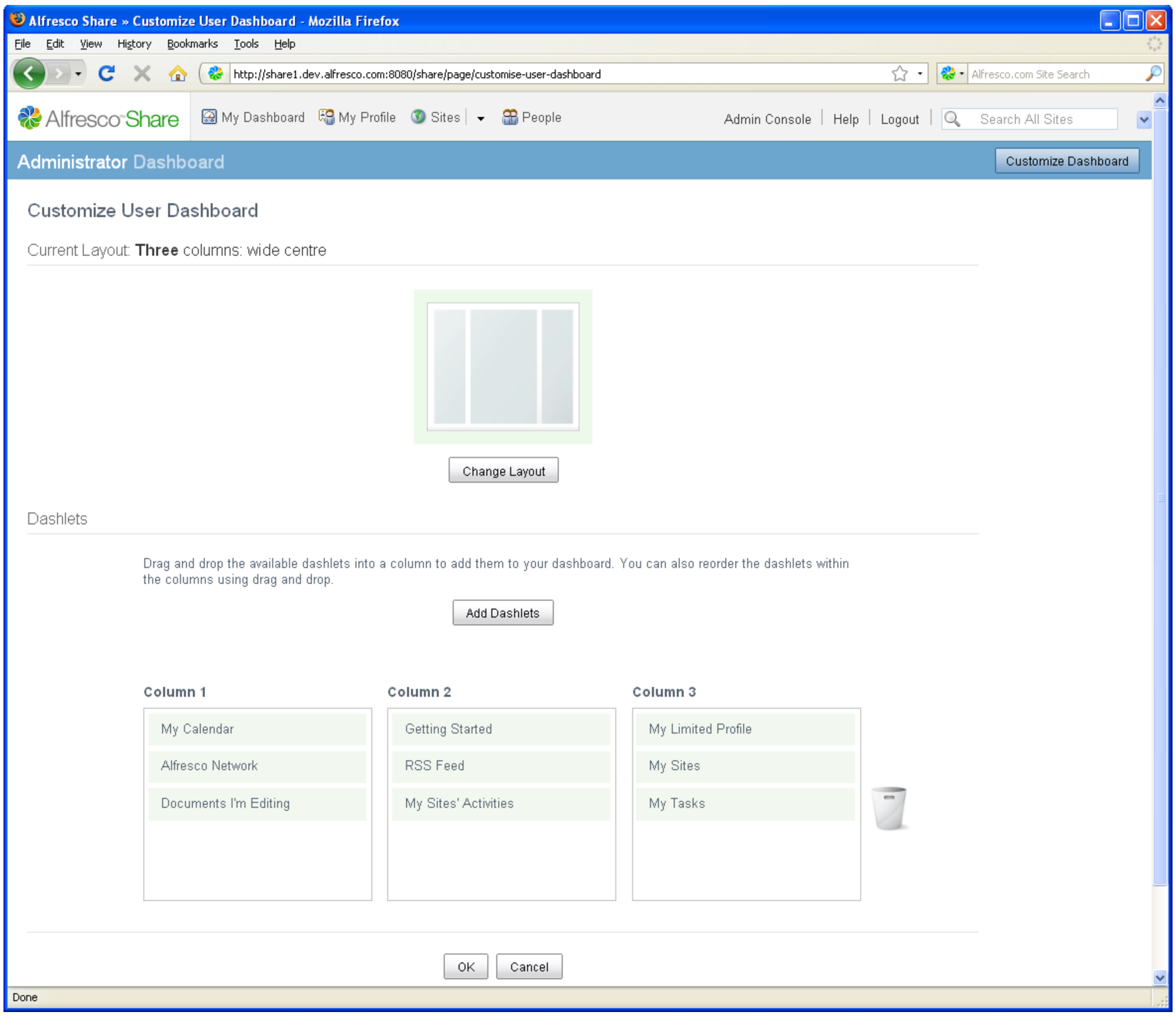
You can set up your personal dashboard to tailor the view you have, depending on your requirements.

You can:

- Modify the dashboard appearance – view as one, two, three, or four columns
- Add and remove personal dashlets

To modify the dashboard appearance and content:

1. Click **Customize Dashboard** on the banner.



The **Customize User Dashboard** page displays.

2. Click **Change Layout** to display the available layouts.
3. Click the graphic or **Select** for the desired layout. For this scenario, there is no need to modify anything.

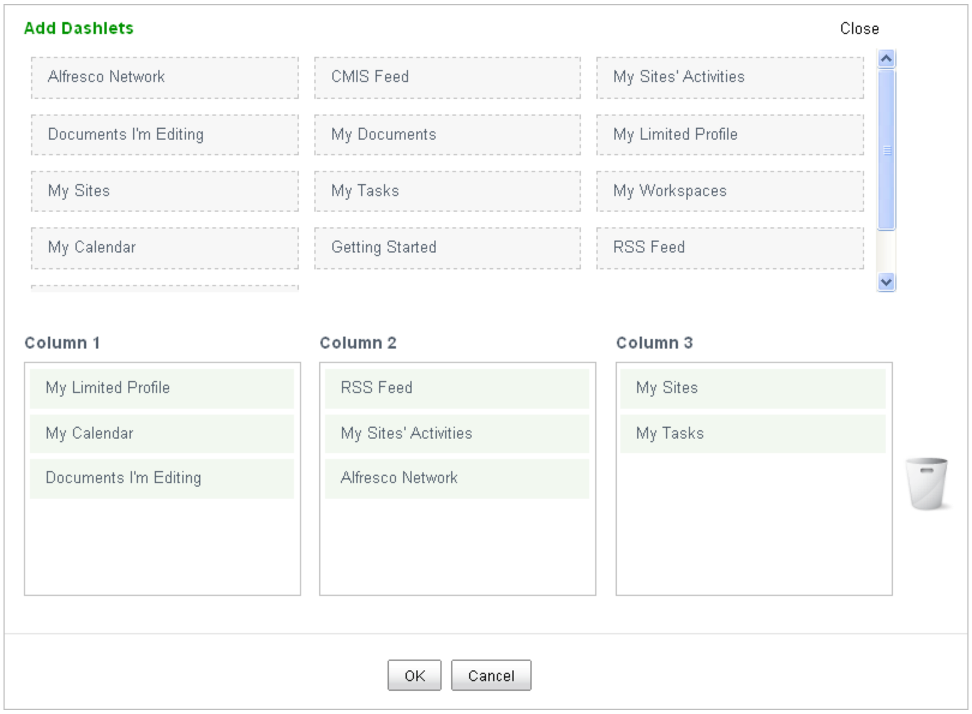
4. Click **Add Dashlets**.
   All available dashlets display.

5. Click and drag **Getting Started** to the trash can to remove it.

6. Use standard drag and drop functionality to move:

   a. **My Limited Profile** to the top of the left column

   b. **Alfresco Network** to the bottom of the middle column



7. Click **OK**.

The configuration is saved and you return to your updated personal dashboard.

Publish your credentials

As part of the site, you want to publish your credentials for all site members to view.

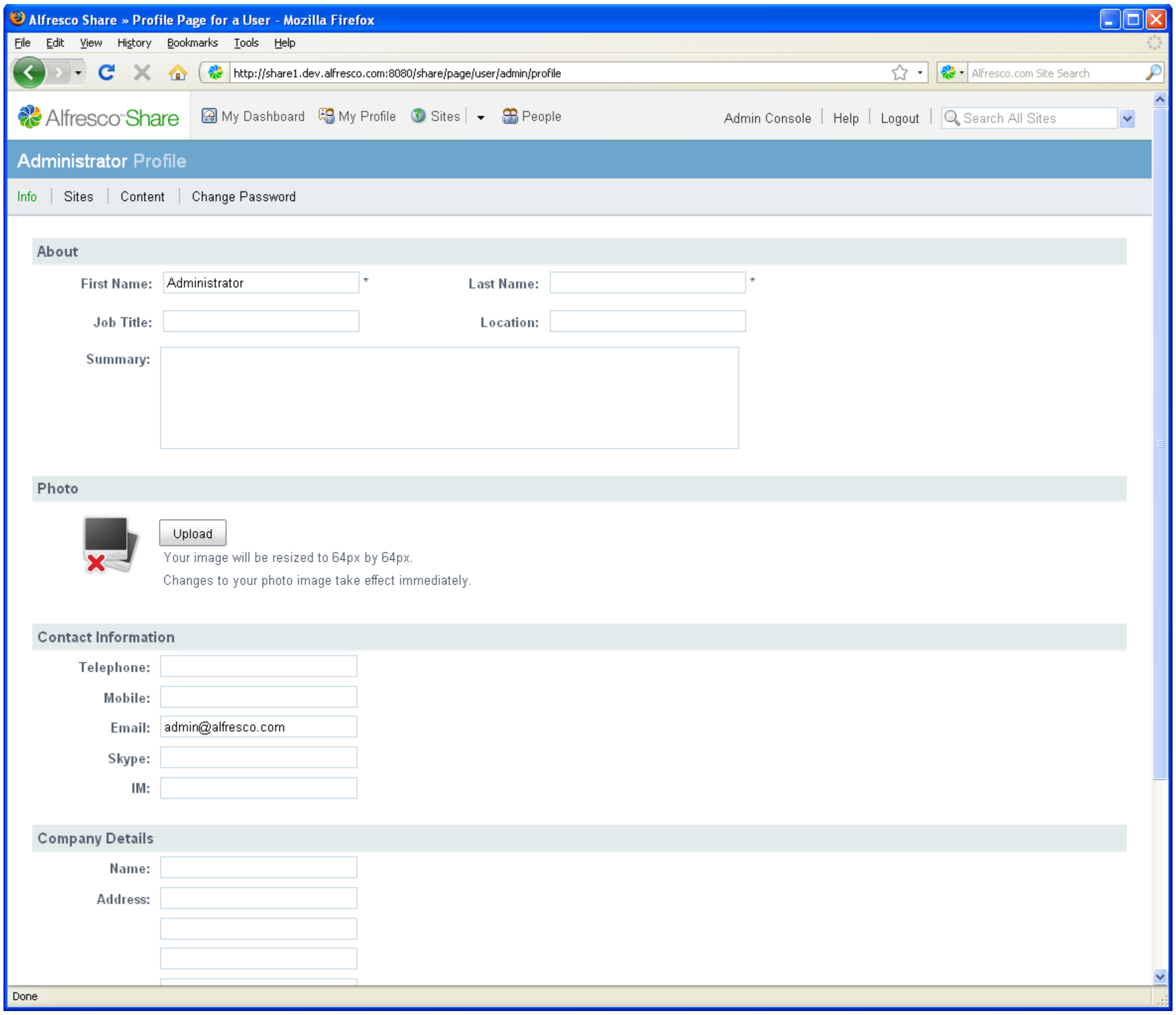
You publish your credentials via your My Profile page component. It enables you to:

- Edit your profile
- Change your password
- Specify your settings

To publish your credentials:

1. In the application toolbar, click **My Profile**.
   Your profile displays.

2. Click **Edit Profile** and complete the information as desired.



3. Click **Save Changes**.

Your profile displays with the updated information.

Create your collaboration site

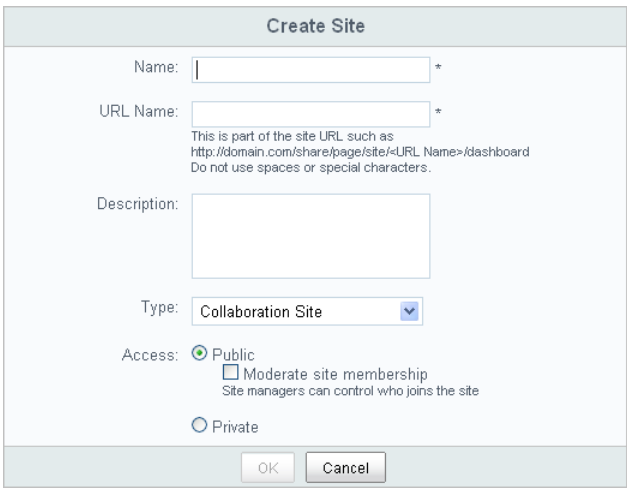
The next step in the scenario is to create a collaboration site for your team.

From here, your team will be able to:

- Share and manage content
- Schedule and manage meeting events
- Have group discussions
- Write blogs
- Author content online and share with others via a wiki

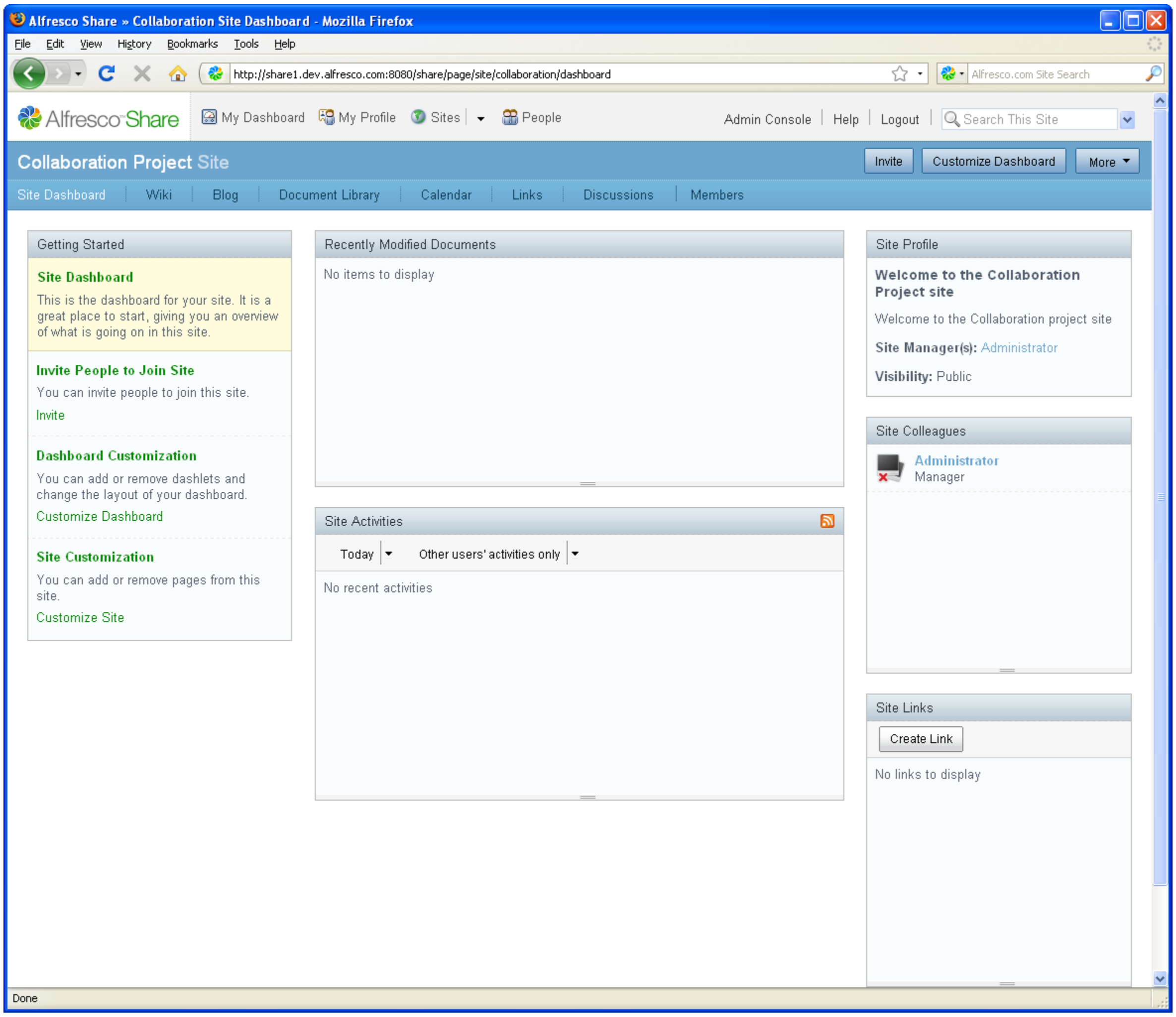
To create your site:

1. In the application toolbar, click **My Dashboard** to return to your personal dashboard.
2. Click **Create Site** in the My Sites personal dashlet.



3. Add the following information:
   a. **Name:** A descriptive name that will display as the title of your site. This is mandatory.
   b. **URL name:** A brief version of the name that is appropriate for a URL; it cannot contain any spaces or special characters. This is mandatory.
   c. **Description:** Information to distinguish your site from others in the My Sites list.
   d. **Type:** For this release, the only available site type is **Collaboration**.

   Note: Your site has public access by default, meaning it is available to be viewed by all users, whether or not they join the site. In a private site, the Site Manager invites users to join. In a moderated public site, the Site Manager controls the membership by accepting or rejecting membership requests.
4. Click **OK** to create and view your new site.



Set up your site

The site dashboard displays all information and activities associated with the site. It is customized by the site owner.

You can set up your new site to meet your team’s requirements. You can:

- Customize the site dashboard using site dashlets
- Customize the site by adding or removing page components on the site

The following site dashlets are available.

Getting Started
The **Getting Started** site dashlet gives you options to get started when you access Share for the first time. Once you are familiar with Share, you can remove it. This dashlet displays by default.

Recently Modified Documents
Your **Recently Modified Documents** site dashlet lists all documents that you have created or modified in the last 7 days, providing quick access to each of them. This dashlet displays by default.

Site Activities
Your **Site Activities** site dashlet tracks the most recent activities that have been performed in the current site. This dashlet displays by default.

Site Profile

Your **Site Profile** site dashlet displays summary details about the current site. This dashlet displays by default.

Site Colleagues
The **Site Colleagues** site dashlet displays all members of this site and their assigned role. This dashlet displays by default.

Site Calendar
Your **Site Calendar** site dashlet contains a rolled up view of events that you have created, as well as events for each site of which you are a member, providing quick access to each of them.

Site Wiki
Your **Site Wiki** site dashlet enables you to display content from the Wiki page component. You can configure this dashlet to select the page you want it to display.

RSS Feed
By default, the **RSS Feed** site dashlet displays all Global Alfresco RSS feeds. You can configure this dashlet to personalize your feeds. You can also add and configure as many instances of this dashlet on the site dashboard as you want.

Web View
The **Web View** site dashlet, by default, displays the Alfresco website but can be configured to display any website.

Site Links
The **Site Links** site dashlet displays the web links relevant to the current site. This dashlet displays by default.

Customize the site dashboard

You can add and reorder the site dashlets on the site dashboard the same as you do with personal dashlets on your personal dashboard.

1. Ensure you are in your new site and click **Customize Dashboard** on the banner.
   The **Customize Site Dashboard** page where you add and remove site dashlets appears.
2. Click **Add Dashlets** and add **Site Wiki** to your site dashboard.
3. Click **OK**.

The configuration is saved and you return to the updated site dashboard.

Customize the site content

Alfresco Share has the concept of page components which you can add to your site as customized functionality. A page component has rich functionality and is URL addressable.

1. Ensure you are within your new site and click **Customize Site** on the banner.
   On the **Customize Site** page, you can add and remove page components. The available page components are:

   Wiki
   The Wiki enables you to create web pages for a collaborative website. Anyone who accesses it can contribute or modify content using a simplified markup language.

   Blog
   The Blog page component enables you to add commentary, descriptions of events, and other material related to your site, such as graphics or video.

   Document Library
   The Document Library page component enables you to store and collaboratively manage any content related to a site, such as documents, media files, or graphics.

Calendar
The Calendar page component enables you to schedule and track events for all sites you own or of which you are a member.

Links
The Links page component enables you to maintain a list of web links related to the site.

Discussions
The Discussions page component is used to post user-generated content related to a site. These often take the form of questions or comments with threaded discussions.

All the page components are displayed by default. For this scenario, there is no need to modify anything.

2. Click **Cancel**.

You return to the site dashboard.

Prepare your site for collaboration

To make the new site as collaborative as possible, you should prepare it before inviting users.

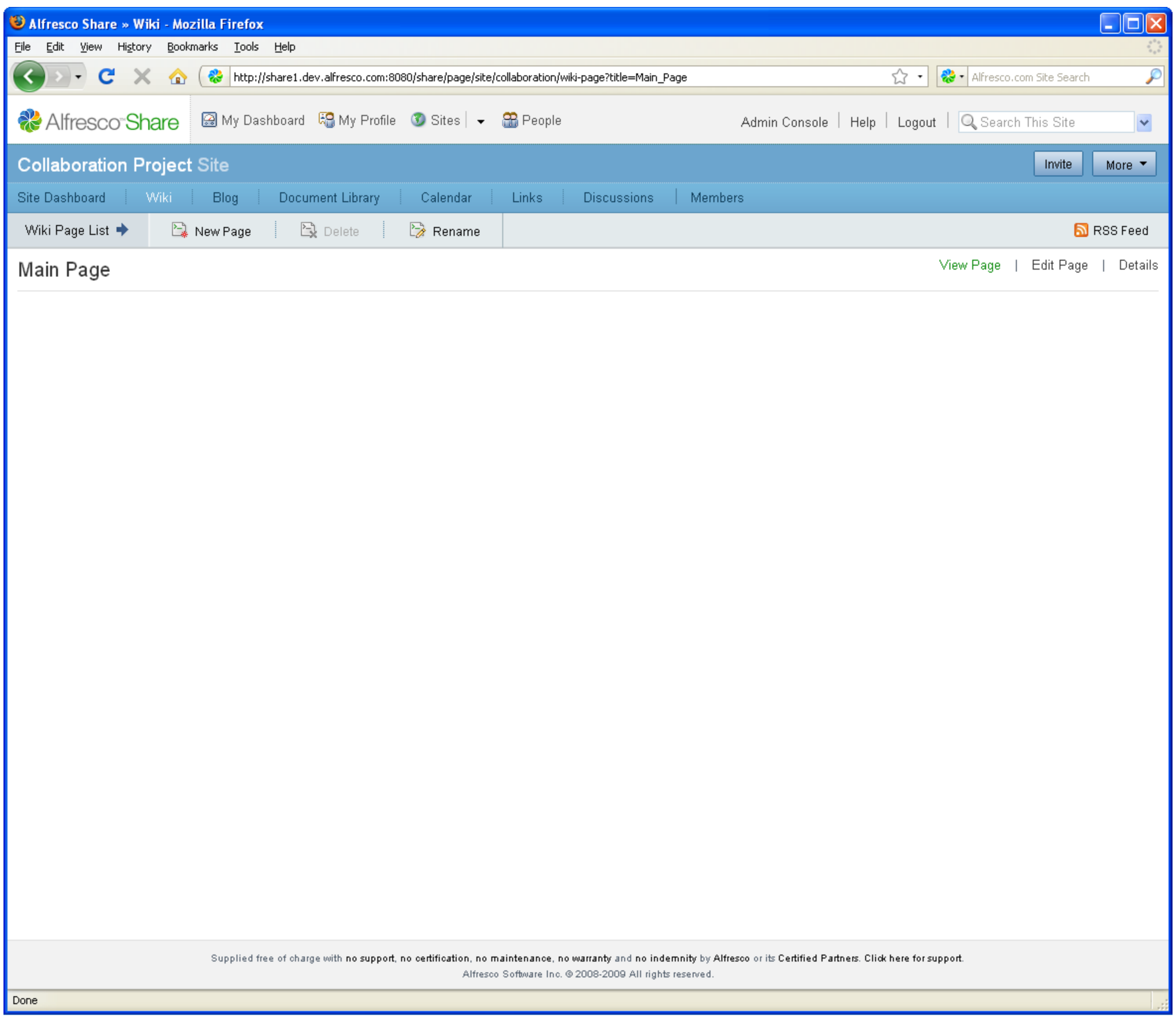
In this step, you will:

- Create an introduction and explanation for the site (Wiki)
- Add a set of marketing material documents (Document Library)
- Schedule a webinar introducing everyone to the site (Calendar)

Create an introduction

You use the Wiki page component within your site to write your introduction. Once it is written, you add it to the Wiki dashlet on your site dashboard.

1. Within your site, click **Wiki** on the banner to open the Wiki page component.
   The Wiki page component opens.



2. Click **New Page** and type `Welcome to our collaboration site` as the title.

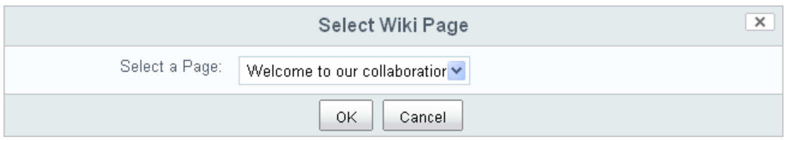
3. Add the following content: The `purpose of this collaboration site is to share information for the project and ensure that communication is as easy as possible.`
4. Add the tag `collaboration`.
5. Click **Save**.

The new page displays.

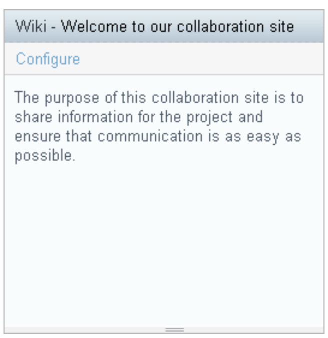
Add the introduction to the site dashboard

Once you create a wiki page, you can set it to be the main wiki page. The content for this page appears in the Wiki dashlet on the site dashboard.

1. Within your site, click **Site Dashboard** on the banner.
   This returns you to the site dashboard for the current site.
2. Click **Configure** in the Wiki dashlet.
   The **Select Wiki Page** page displays.



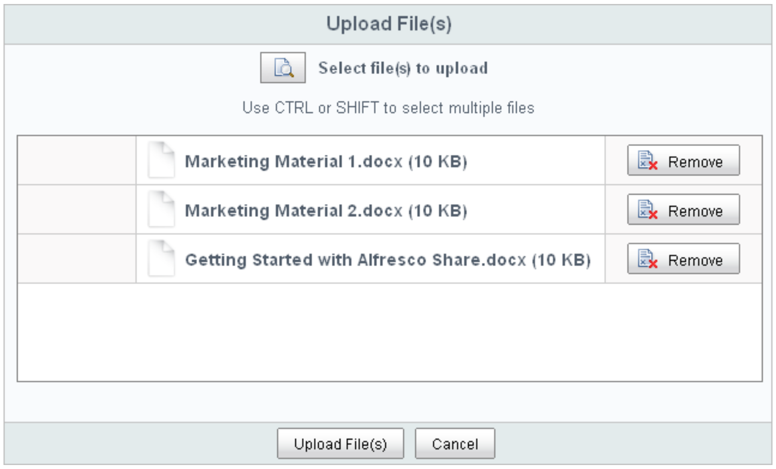
3. Click **OK** to accept the page you have just created.
   The text from this wiki page displays in the Wiki dashlet.



Add marketing material

You have been preparing for this site for a month now and have three pieces of marketing content that you would like to upload. For this step of the scenario, choose three pieces of content on your personal computer to add.

1. Within your site, click **Document Library** on the banner.
   The Document Library page component opens.
2. Click **Upload** to load your three content items.
   The **Upload File(s)** page opens.
3. Click the browse button to locate any three pieces of content on your computer to upload.
   The **Upload File(s)** page displays the three content items as a list.



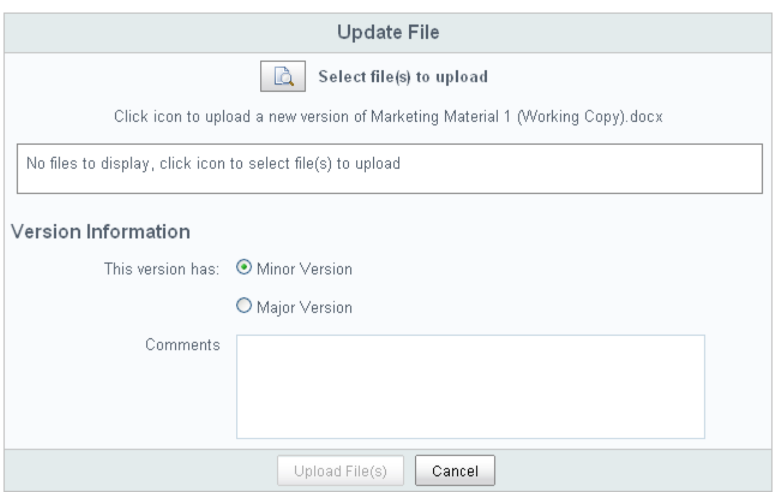
4. Click **Upload File(s)**.
   The content items display their upload status.
5. Click **OK** when all content is 100% complete.

The page closes and the Document Library displays the selected content items.

Update a document

After uploading the marketing material, you realize that one document contains an error.

1. In the Document Library item list, highlight one of the content items you have uploaded.
2. Click **More** in the dynamic menu associated with this content and then select the **Edit Offline** action.
   The content moves to the **I'm Editing** view, indicating that the document is checked out to you.
3. Choose to save the file and click **OK** to save the content item in a location from which you can edit it.
   The content name will be appended with **(Working Copy)** in the location in which you save it.
4. Navigate to this content item on your personal computer, change a word, and save it.
5. In the browsing pane, ensure **I'm Editing** is the selected view under **Documents**.
6. In the item list, select the document you modified and click the **Upload New Version** action.
   The **Update File** page displays.



7. Click the browse icon to locate your modified file.

Remember that it is appended with **(Working Copy)**.
Once you select it, it displays in the **Update File** page.

8. Specify whether it is a minor or major version, type any comments you have, and click **Upload File(s)**.
9. Click **OK** when all content is 100% complete.

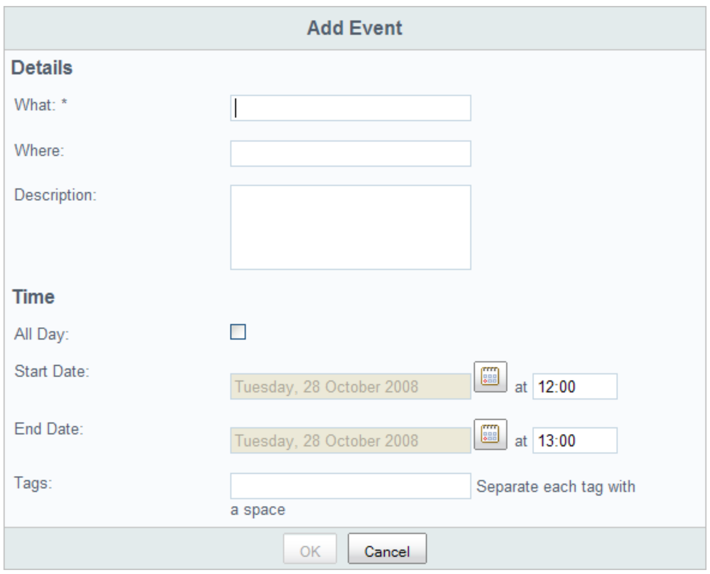
The updated content item displays in its original location, the **All Documents** view, in the library.

Schedule a webinar

As part of promoting this collaboration site, you want to schedule a webinar to welcome the new users and discuss the purpose of the site.

To schedule a webinar:

1. Within your site, click **Calendar** on the banner.
   The Calendar page component opens.
2. Select the date you want to have the webinar and click the **Add event** icon (+) within that date.
   The **Add Event** page displays.



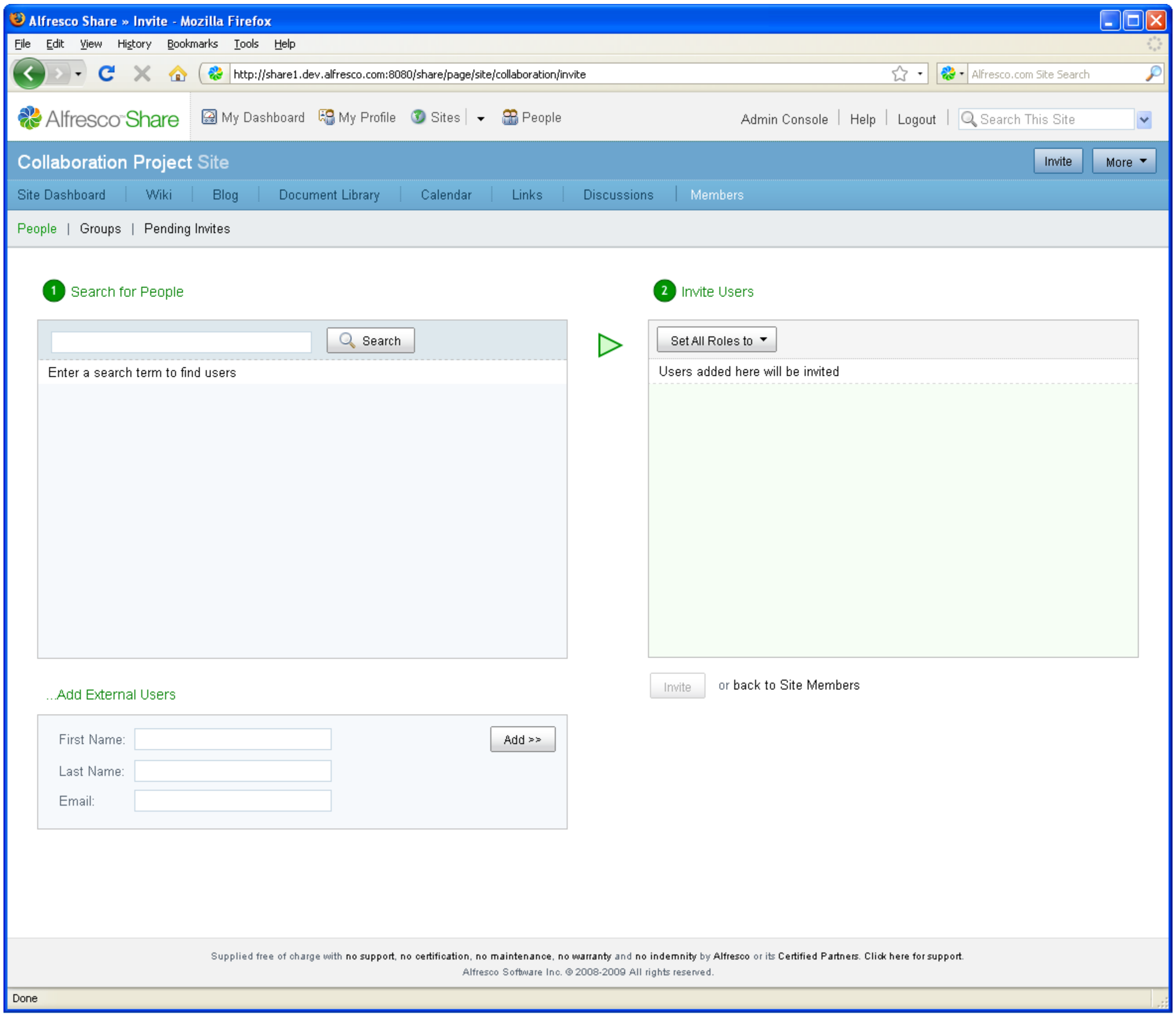
3. Enter the webinar details and click **OK**.

You return to the calendar with your new webinar displayed on the date you scheduled it.

Invite members to your site

After you have set up your collaborative site, you can invite people to join it.

1. Within your site, click **Invite** on the banner.
   The **Invite** page displays.

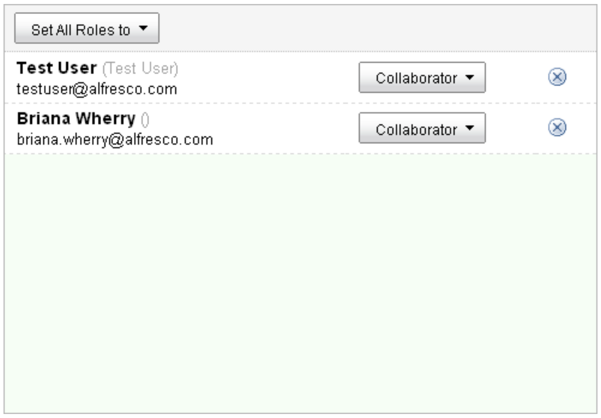


2. In the **Search for People** section, type the full or partial name of an internal user you want to invite and click **Search**.
   > Important: If you do not have any users for this installation, add them using the Share Admin Console. Otherwise, skip to step 4.

3. Click **Add** associated with the user you want to add.
   The user displays in the **Invite Users** list.

4. In the **Add External Users** section, type the first name, last name, and email for the external user you want to invite, then click **Add**.

5. In the **Invite Users** list, select a role from the **Select Role** menu for each user.
   Note: If you want to assign all users the same role, select a role from the **Set All Roles to** menu to apply to all of the users listed. The role displays in the menu.



6. Click **Invite**.

You are notified that the invite has been sent via email to each member invited.

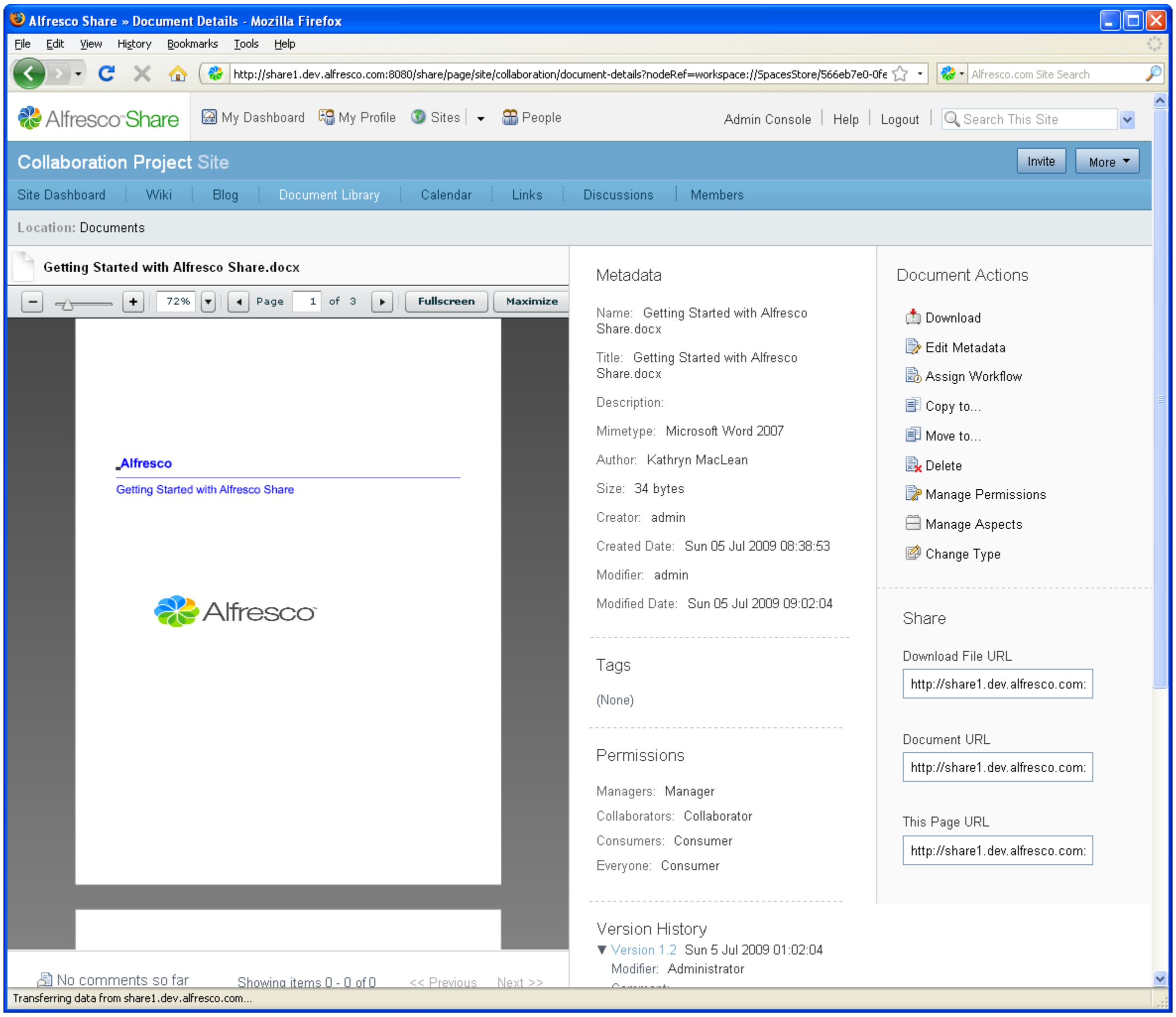
View activities within your site

Now that you have prepared your site and invited your users, you can return to the site dashboard and see the specific activities that occurred and documents that were modified within the site.

The Recently Modified Documents dashlet displays the documents added and updated in the past seven days.

On this dashlet you can:

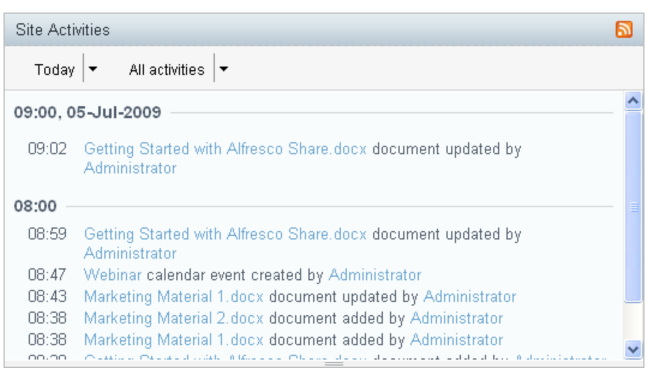
- Click the document name to display a detailed preview of the document.



- From the preview, click the link from **Location** to access the library folder in which this document resides.

The Site Activities dashlet displays the most recent activities that have been performed in this site.

- In this dashlet, select the **All Activities** view.



- Use the resizing bar along the bottom of this and many other dashlets to adjust the height of the dashlet as desired.

On the Site Activities dashlet you can:

- Click an event to display the scheduled event in the Month view of the Calendar page component.

- Click a new or updated wiki page to display the page in the Wiki page component.
- Click the name of the user responsible for an activity to view their user profile.

Use SharePoint Protocol (SPP) Support with your MS Office documents

If you are familiar with editing your Microsoft™ Office documents using SharePoint, Alfresco enables you to work with the same interface, using Alfresco Share as your repository instead of SharePoint.

Refer to the Alfresco tutorial *Managing Alfresco Content from within Microsoft Office* for more details on how to use this functionality.