

## Managing Alfresco Content from within Microsoft Office





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## Typographic conventions

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The following typographic conventions are used in this guide:

**Bold**

User Interface elements

**Mono-spaced font**

Text the user types

## Introduction

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This tutorial introduces the SharePoint Protocol Support for Alfresco Labs 3.2 Final.

Microsoft SharePoint Protocol technology enables Content Management (CM) to be used within Microsoft Office applications. The Content Management functionality mirrors that of SharePoint.

There are several ways to work with the SharePoint features of Microsoft Office. This tutorial highlights these features, including what Alfresco Share does and does not support. Differences between the Alfresco support and the standard SharePoint integration are identified for users already familiar with SharePoint.

The audience for this tutorial is users of Microsoft Office 2003 and 2007 on Windows. The procedures are documented using Microsoft Office 2007 only.

## System requirements and prerequisites

The support introduced is based on Office 2007 and is restricted to the Word, Excel, and PowerPoint applications.

This tutorial assumes you are familiar with Alfresco Share and Alfresco Explorer.

You must also know how Alfresco has been installed and configured for your company's environment and whether the Alfresco web server and Alfresco Share are on the same URL address.

Before beginning this tutorial, you must:

1. Ensure the Alfresco Explorer and Share web applications are installed.
2. Ensure the Alfresco web server is running.
3. Log in to Alfresco Share as the Administrator (`admin, admin`) and use the Admin Console to create three user accounts, as follows:

**User A**

User name and password: `userA`

**User B**

User name and password: `userB`

**User C**

User name and password: `userC`

4. Set Internet Explorer as your default browser.
5. Ensure your Alfresco server is recognized as a Trusted Site by Internet Explorer.
6. Give the following information to any users running this tutorial:
  - Alfresco server URL
  - Alfresco Share URL

## Get started

---

The Getting Started with SharePoint Protocol Support tutorial walks you through the document management features built into Microsoft Office to illustrate how they can be used with documents stored in a Share collaboration site.

A *Collaboration Site* in Alfresco Share is the equivalent of a *Team Site* in SharePoint.

While all Microsoft Office applications (Word, Excel, and PowerPoint) can interact with Share, for the purpose of this tutorial, you will perform all tasks in Microsoft Word 2007 for Windows.

## Scenarios

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

Managing a document within Microsoft Word, which includes:

- Creating a Document Workspace
- Editing a document (checking out and in)
- Viewing a previous document version and then restoring the document to that version
- Adding content to a Document Workspace

Collaborating with colleagues for a document review, which includes:

- Saving a document to the Document Workspace
- Customizing the Document Workspace
- Managing the site membership by adding and removing users; viewing and editing user profiles; and changing member roles
- Working with linked documents (local and site copies)
- Deleting the Document Workspace



## Manage a document

Many users will work with documents in the Share repository without ever entering the Share user interface. It is the SharePoint Protocol support built into Alfresco that enables you to do this.

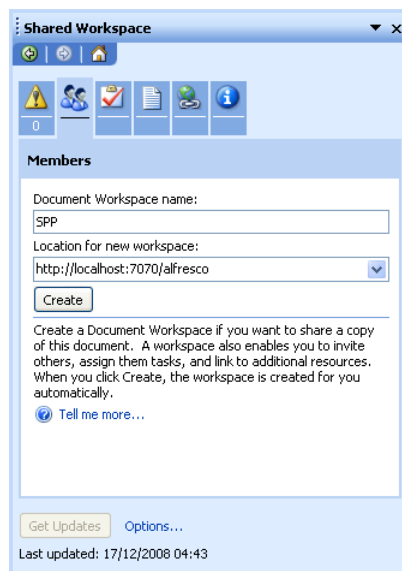
This section of the tutorial walks you through some common SharePoint functionality in Word that you can use for documents stored in the Share repository.

### Create a Document Workspace

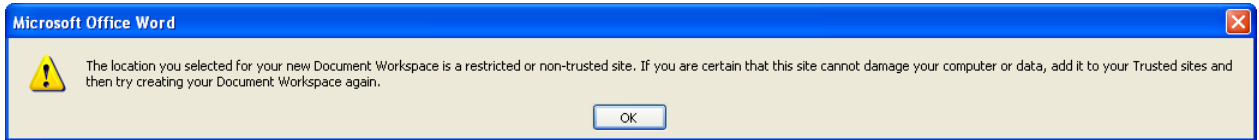
To perform these document management tasks, you need to start with a Document Workspace containing a single document. A Document Workspace is simply a particular type of Alfresco Share site. You can create this within Word.

To create a Document Workspace from Word:

1. Open Word, create a new document, and enter some text.
2. Save this document on the desktop as `local.docx`.
3. Click the Microsoft Office button and select **Publish**, then **Create Document Workspace**. The Document Management task pane opens in Word to the right of the document. The Document Workspace name defaults to **local**, the name of your document.
4. Change the default entry in the **Document Workspace name** field to `SPP`.  
**Note:** When creating a site, all non-alphanumeric characters in the **Document Workspace name** field, including spaces, are converted to underscores for both the Share site name and the URL name.
5. In the **Location for new workspace** field, type `http://<Alfresco server URL:7070>/alfresco`.  
For example, `http://alfrescoserver:7070/alfresco`.



6. Click **Create**.  
If you have not set up your Alfresco server as a trusted site, you receive the following message.



If the message appears, add the Alfresco server location to Internet Explorer's list of trusted sites, then return to Word and click **Create** again.

7. When prompted for login credentials, log in as User A: type `userA` for both the user name and password, then click **OK**.  
> **Important:** Do not check **Remember my password** as you will be changing users later in the tutorial.  
Word creates the Document Workspace (Share site), adds to this the document `local.docx` on your desktop, and displays the Document Management task pane. Office may prompt you to log in again. If so, use the same user name and password.
8. (Optional) To verify that the new site has been created in Share:
  - a. Open Share in any browser (`http://<Alfresco Share URL:8080>/share/`) and log in as User A (`userA, userA`).  
The My Sites dashlet on your personal dashboard lists the SPP site.
  - b. Click the site name, **SPP**, to navigate to the SPP site dashboard.  
The Recently Modified Documents dashlet indicates that this site's document library contains the document `local.docx`.
  - c. In Share, click **Logout** and close the browser.
9. In Word, close the document `local.docx`.

## Edit a Document Workspace document

You can open a document stored in a Document Workspace from Word itself. When you do this, Word automatically displays the Document Management task pane, which contains many of the document management features available.

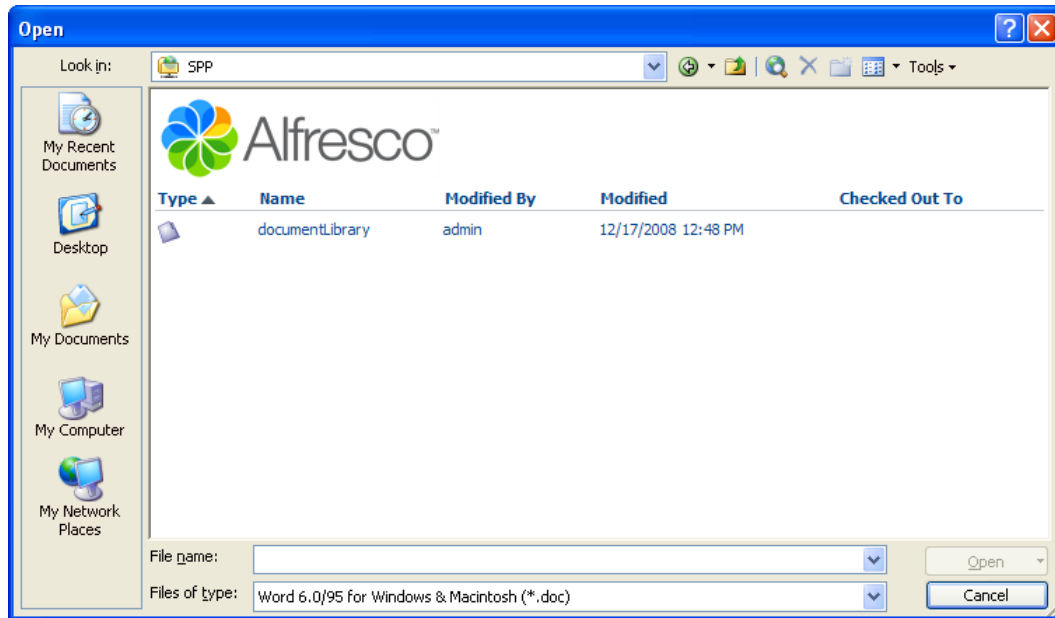
Editing a document includes the following tasks:

- Opening a Document Workspace document
- Checking out the document
- Updating the document
- Checking in the document

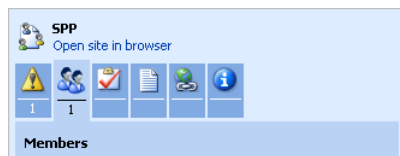
First, open the document you just created and added to the SPP Document Workspace.

To open the Document Workspace document:

1. In Word, click the Microsoft Office button and select **Open**.
2. Enter `http://<Alfresco server URL:7070>/alfresco` as the **File name** and click **Open**.  
**Note:** If prompted, log in as User A (`userA, userA`)  
This returns a list of all existing Share sites.
3. Select **SPP** and click **Open** to navigate into that site.  
The window switches to the Web View.



4. Select the **documentLibrary** folder and click **Open**.
5. Select **local.docx** and click **Open**.  
Word displays the selected document, which you will use in the next two tasks to walk through the process of editing a file.
6. Click the Microsoft Office button and select **Server**, then **Document Management Information**.  
The Document Management task pane displays.



The name of the Document Workspace , or Share site, appears at the top of the pane.

There are six tabbed panels available on this pane: Status, Members, Tasks, Documents, Links, and Document Information. Position your cursor over a tab to display the tab name.

## Check out the document

Checking out a document to edit it locks the file to all other users while you make your changes. Members of the Document Workspace can still view and download the original version of the document while you have it checked out.

To check out local.docx from the Document Workspace:

1. Click the Microsoft Office button and select **Server**, then **Check Out**.  
On the Status tab of the task pane, the **Check in** link appears, indicating the document is now checked out to you.
2. (Optional) To verify the check-out in Share:
  - a. Open Share in any browser (<http://<Alfresco Share URL:8080>/share/>) and log in as User A (`userA`, `userA`).
  - b. Click the site name, **SPP**, on your My Sites dashlet.
  - c. Click **Document Library**.

The library item list displays a lock icon to the left of the file local.docx, indicating it is checked out.

- d. In Share, click **Logout** and close the browser.

## Check in the document

When you finish editing a checked out document, you must check it in to update the original in the Document Workspace. This removes the lock so the updated version is available for other users.

To edit and check in the document:

1. Make some changes to your open document (local.docx) and save the document.
2. On the Status tab of the Document Management task pane, click **Check in** (or click the Microsoft Office button and select **Server**, then **Check In**).
3. Enter an appropriate comment on the **Check In** dialog box and click **OK**.

**Note:** The option **Keep the document checked out after checking in this version** enables you to update the content while keeping the document checked out to you. For the purpose of this tutorial, do not select this option.

The Status tab in the task pane is cleared, indicating the document is now checked back into the site. The SPP site in Share no longer displays the lock icon previously associated with the file local.docx.

4. (Optional) To verify the check-in in Share:
  - a. Open Share in any browser (<http://<Alfresco Share URL:8080>/share/>) and log in as User A (`userA`, `userA`).
  - b. Click the site name, **SPP**, on your My Sites dashlet.
  - c. Click **Document Library**.  
The file local.docx no longer displays the lock icon.
  - d. In Share, click **Logout** and close the browser.

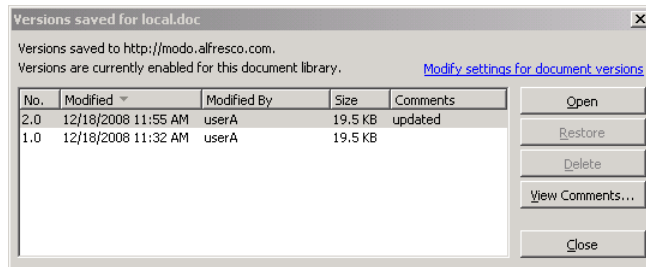
## Work with document versions

Once you add a document to the Document Workspace, it has version history. You can view and manage the versions from Word.

**> Important:** Though enabled, Alfresco does not support deleting individual document versions. Ensure local.docx is open. In this task, you will use this document to view the version history and then explore the other document version features available.

To view the version history:

1. On the Document Management task pane of the document local.docx, select the Document Information tab.
2. Click the Microsoft Office button and select **Server**, then **View Version History**.  
The **Versions saved for [filename]** dialog box displays all previous versions of the document. The information provided includes the version number, the date and time of the modification, the user who made the modification, and, where provided, a truncated comment.



- To view the full comment for a version listed, click the desired comment. The **Check In Comments** dialog box displays the full comment for the selected version.
- Close the **Check In Comments** dialog box.

## View a previous version of the document

Any version listed in the **Versions saved for [filename]** dialog box is available to be viewed. In this task you can view the original version of the document. This dialog box remains open.

To view the original version of the document:

- On the **Versions saved for [filename]** dialog box, select version 1.0 in the version list and click **Open**.  
A read-only version of the original document opens in a new Word window.
- Close the window when you have finished reviewing the content.

## Manage the document versions

Selecting a previous version of the document in the **Versions saved for [filename]** dialog box enables both the **Restore** and **Delete** buttons.

Let's restore the original version of the document as your current version. The dialog box will have closed automatically in the previous task.

To replace the current document with a previous version:

- Click the Microsoft Office button and select **Server**, then **View Version History**.
- On the **Versions saved for [filename]** dialog box, select the original document (version 1.0) in the version list and click **Restore**.
- Click **Yes** to confirm that you want to replace the current version of the document with the selected version.  
**Note:** Office may prompt you to log in again.  
Word replaces the content of the current version with the content of version 1.0.
- Click the Microsoft Office button and select **Server**, then **View Version History**.  
Notice that restoring the original content has created a new version: 3.0. A read-only copy of version 2.0 of the document remains open.
- Click **Close** on the **Versions saved for [filename]** dialog box.  
The document local.docx, now displaying its original content, remains open.
- Close the version 2.0 copy of local.docx.

## Add content to the Document Workspace

Let's presume you require research material for this site. In this step, you create a separate folder in the document library to contain this material and then add a document to the folder.

To create a folder and upload content:

1. Open the Document Management task pane of the document local.docx and select the Documents tab.  
This tab displays the files and folders that currently reside in the site's document library. From this tab, you can manage the contents of the Document Workspace.
2. At the bottom of the task pane, click **Add new folder**.
3. Enter `Research` as the **Folder Name** and click **OK**.  
The newly created folder appears in the **Documents** list on the task pane. You can now upload a document to it.
4. Select the Research folder.
5. Click **Add new document**.
6. Click **Browse** on the **Add New Document** dialog box.
7. Locate a Word document on your computer to upload and click **Open**.  
**Note:** The option **Make workspace updates available when I open my copy** enables you to create a link between this document on your computer and the copy being placed in the Share site. For this tutorial, do not check this option.
8. Click **OK**.  
The document appears in the **Documents** list within the Research folder. The label **New** indicates the document has been recently uploaded.  
**Note:** To remove a document from the Document Workspace, position your cursor over the document name, open the menu that becomes active, select **Delete**, and confirm the deletion when prompted.
9. In Word, close the document local.docx.

## Collaborate with colleagues on a document

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A Document Workspace enables you to collaborate on documents with one or more colleagues. In the first scenario you created a Document Workspace, or Share site, called SPP. That workspace should now contain two documents: local.docx and another document that you uploaded, which is located in the Research folder.

With this site now set up and populated, the second scenario will familiarize you with some of the collaboration features available for working on workspace content with colleagues.

### Save a document to the Document Workspace

Now that you have created the Document Workspace, you can save Word documents directly to it.

To save a Word document to the Document Workspace:

1. In Word, create a new document and enter some text.
2. Click the Microsoft Office button and select **Save**.
3. Enter `http://<Alfresco server URL:7070>/alfresco/SPP/documentLibrary/spp-tutorial.docx` as the **File name**.

The URL takes the following form:

```
http://<Alfresco server:7070>/alfresco/<site URL name>/documentLibrary/<folder structure>/<filename>
```

**<Alfresco server:7070>**

Server and port where Alfresco is installed and running

**alfresco**

Alfresco's SharePoint Protocol Support name; must be used with all URLs

**<site URL name>**

URL name of the Document Workspace (Share site) where the document is being saved

**documentLibrary**

Document Library page component indicator; this is required

**<folder structure>**

Path and destination folder when a folder structure has been established within the site's library; there is no folder structure in the current example

**<filename>**

Filename of the current document

4. Click **Save**.  
Word saves the new document (titled spp-tutorial.docx) to the SPP Document Workspace. In Share, this is the document library of the specified Share site (the site with the URL name SPP).
5. (Optional) To verify the saved document:
  - a. Click the Microsoft Office button and select **Server**, then **Document Management Information**.
  - b. Beneath the Document Workspace name (SPP), click **Open site in browser**.
  - c. Log in as User A (`userA`, `userA`).  
The SPP Site dashboard appears. The Recently Modified Documents dashlet now displays spp-tutorial.docx in addition to the two documents added in the first scenario.
  - d. In Share, click **Logout** and close the browser.

## Customize the Document Workspace

Once the Document Workspace exists, you can manage the site directly from Word.

You can:

- Edit the site name
- Customize the site

When you create a Document Workspace from Word, the URL name is generated automatically from the name provided for the site. Once created, you cannot edit the URL name. In this tutorial, both the site name and URL name are SPP.

### Edit the site name

Ensure the document spp-tutorial.docx is open on your computer. The Document Management task pane is open in the document window with the site name, SPP, displayed at the top. This is the name you will edit.

To edit the site's display name:

1. On the Document Management task pane of the document spp-tutorial.docx, position your cursor over the site name: **SPP**.
2. Open the menu that becomes active and select **Change Site Title**.
3. Change the site title to *SharePoint Protocol Support* and click **OK**.
4. (Optional) To verify the edit:
  - a. On the Document Management task pane, click **Open site in browser** beneath the Document Workspace name (SPP).
  - b. Log in as User A (*userA, userA*).  
The site dashboard appears, now named *SharePoint Protocol Support*
  - c. In Share, click **Logout** and close the browser.

### Change the site settings

In Share, there are six page components available for a site: Wiki, Blog, Document Library, Calendar, Links, and Discussions. By default, when you create a Document Workspace from Word, the site includes only the Document Library and Links components. From Word, you can easily access the Share page for customizing the site. Again, you will work from the document spp-tutorial.docx.

To customize the site:

1. On the Document Management task pane of the document spp-tutorial.docx, position your cursor over the site name: **SharePoint Protocol Support**.
2. Open the menu that becomes active and select **Change Site Settings**.
3. Log in to Share as User A (*userA, userA*).  
The browser opens displaying the **Customize Site** page for the *SharePoint Protocol Support* site. Only the Document Library and Links page components are included in the site.
4. Add and remove pages from the site as desired.  
For details on performing this task, refer to the Share user help.  
**Note:** Only the Document Library page component is required for this tutorial.
5. In Share, click **Logout** and close the browser.



## Manage the Document Workspace membership

Only users who are members of the Document Workspace can work with the documents stored there. You perform the tasks relating to site members on the Members tab of the Document Management task pane.

You can:

- Add members to the site
- View a site member's user profile
- Edit your own user profile
- Change a site member's role
- Remove a site member

### Add users to the site

Currently only User A, whose login credentials you used to create the Document Workspace, is a member of the SharePoint Protocol Support site. The user who creates the site is automatically given the role of Site Manager.

To add users to the site:

1. On the Document Management task pane of the document spp-tutorial.docx, select the **Members** tab.  
User A appears at the top of the tab.
2. At the bottom of this pane, click **Add new members**.
3. Type `userB; userC` to add User B and User C as members of the site.
4. Select **SiteCollaborator** as the site role for these users and click **Next**.  
When adding multiple users, the users will all be assigned the same role. Once added, you can change the role for an individual site member.
5. Confirm the member details displayed and click **Finish**.  
**Note:** You are prompted with the option to send an email notifying these users of their invitation to the site. Decline the notification and click **OK**.  
The **Members** tab displays the newly added site members: User B and User C.

### View and edit user profiles

You can view your own profile and the profiles of all other site members. However, you can only edit and change the password for your own profile.

To edit your own profile and view another member's profile:

1. On the Document Management task pane of the document spp-tutorial.docx, position your cursor over **User A**, open the menu that becomes active, and select **Edit User Information**.  
**Note:** If prompted, log in as User A (`userA, userA`).  
Share opens. The User Profile page component displays your user details (User A). From here you can change your password and edit your profile, though you do not need to perform either task for the purpose of this tutorial. For details on performing these tasks, refer to the Share user help.
2. In Share, click **Logout** and close the browser.

### Change a site member's role

There are four roles available in Share sites: Manager, Collaborator, Contributor, and Consumer. Only a Site Manager can manage site membership by changing a member's role.

To change a site member's role:

1. On the Document Management task pane of the document spp-tutorial.docx, position your cursor over **User C**, open the menu that becomes active, and select **Edit Permission Level**.
2. When prompted, log in as User A (`userA`, `userA`).  
Share opens displaying the **Search for Site Members** page.
3. Type `user` in the field provided and click **Search**.  
Share returns a list of the site members matching the search criteria entered. The assigned role is displayed for each member. As the Site Manager, you can change the member roles and remove members from the site. For details on performing these tasks, refer to the Share user help.
4. In Share, click **Logout** and close the browser.

## Remove a site member

Only the Site Manager can remove a member from the site.

To remove a Document Workspace site member:

1. On the **Members** tab, position your cursor over **User C**, open the menu that becomes active, and select **Remove Member from Workspace**.
2. Click **Yes** when a prompt appears for you to confirm this action.
3. Close the document spp-tutorial.doc.

## Work with a Document Workspace document locally

When you add or save a document to the Document Workspace, the original version of the document remains on your computer. This local copy of the document is linked to the copy in the site's document library.

It is important to understand the relationship between these files. Once linked, you can work on one version and then update the other to keep the two files synchronized.

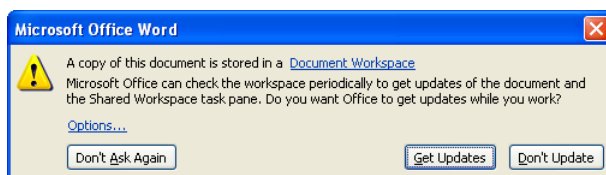
You can do the following with linked documents:

- Download updates from the Document Workspace copy into the local copy
- Update the Document Workspace copy with changes made locally
- Save an updatable copy on another computer
- Manage the document updates by merging, comparing, or replacing copies

## Download document updates from the site

Use the file local.docx, which you used to create the SharePoint Protocol Support Document Workspace. It should still reside on your desktop; a copy also exists in the workspace (Share site library).

1. Double-click local.docx on your desktop.  
The following prompt appears:



As a copy of local.docx exists in the Document Workspace, it is possible that your local copy is no longer current. You want to synchronize your local copy with the site copy to ensure you have the current version.

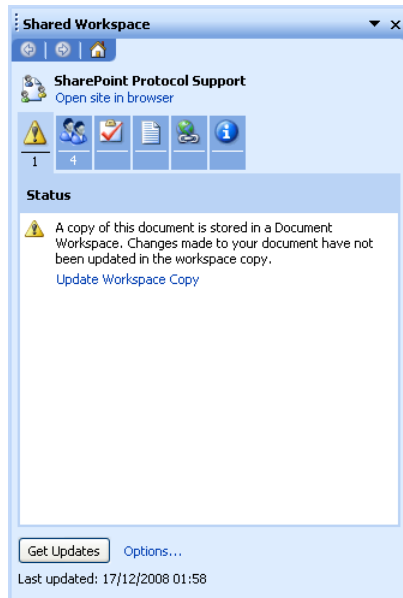
2. Click **Get Updates**.

Word checks for and applies changes made by other members to the local copy of the document.

## Update the Document Workspace copy

When a local copy of a document is linked to a Document Workspace, Word detects changes made to the document and prompts you to resolve the discrepancy. While in the previous task you updated the local copy with the version from the workspace, in this task you will update the workspace copy with the local version.

1. If not already displayed, open the Document Management task pane.
2. Make some changes to your open document (local.docx) and save the document. The Status tab displays a warning indicating there is a discrepancy between the local copy and the workspace copy of the document.



3. Click **Update Workspace Copy** on the **Status** tab.

Word checks for and applies changes made in the local copy to the version in the Document Workspace.

## Save an updatable copy locally

You (User A) have the original copy of the document local.docx on your desktop. The **Save Updatable Copy** feature in Word enables other site members to obtain a copy of this document to reside on their own machines.

**> Important:** You can perform this task only if you have access to a second machine that uses Internet Explorer as the default browser and has your Alfresco server as a Trusted Site.

To save an updatable copy of a Document Workspace file:

1. On another machine, open Word. Click the Microsoft Office button and select **Open**.
2. Enter `http://<Alfresco server URL:7070>/alfresco`.

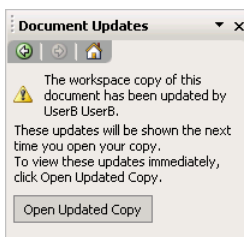
3. At the login page, log in as User B (userB, userB).
4. Browse to /SPP/documentLibrary and open local.docx.  
You (User B) now have the Document Workspace copy of the document local.docx open.
5. On the Document Management task pane, select the Documents tab.  
The document local.docx is highlighted in the **Documents** list.
6. Position your cursor over the document name, open the menu that becomes active, and select **Save Updatable Copy**.
7. Save the document locally when the **Save As** dialog box appears.  
**Note:** If prompted, log in as User B.  
User B now has a local copy of local.docx, just as User A does. This copy, like the original document on your own machine, is linked to local.docx in the Document Workspace.
8. Make some changes to local.docx, save the document, and upload it to the Document Workspace, just as you did in *Updating the site copy* as User A.
9. Close local.docx and exit Word.

## Manage document updates

When multiple users hold local copies of a Document Workspace document, the Document Updates pane provides you with options for managing the edits. When changes to your local copy are found to conflict with the version stored in the site, this feature enables you to compare the two versions, overwrite either copy, or merge the two copies.

> **Important:** You can perform this task only if you were able to complete the previous task ([Saving an updatable copy locally](#)).

1. Return to your original machine where the document local.docx is open.
2. On the Document Management task pane, select the Documents tab.  
The document local.docx is highlighted in the **Documents** list.
3. Position your cursor over the document name, open the menu that becomes active, and select **Document Updates**.  
The Document Updates task pane displays.



4. Click **Open Updated Copy** to obtain the updates.

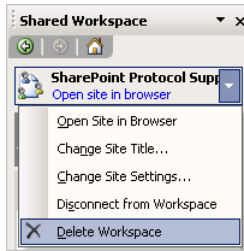
## Delete the Document Workspace

Once you complete the collaboration on the document you typically delete the Document Workspace as it is no longer required. This action permanently deletes the site and all of its contents.

With the tutorial now complete, you can perform this task to remove the sample site, SharePoint Protocol Support, and its contents from Share. Ensure the document local.doc is open.

1. On the Document Management task pane, position your cursor over the site name: **SharePoint Protocol Support**.

2. Open the menu that becomes active and select **Delete Workspace**.



3. Click **Yes** to confirm the deletion.  
The site is removed.

## Document Workspace dashlet in Share

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The My Workspaces personal dashlet in Share displays a list of all Document Workspace sites of which you are a member.

From this dashlet, you can do the following:

- Click a Document Workspace name to enter the related site.
- Click **Delete** to the right of a Document Workspace name to delete the site.

## Features not supported in this release

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Alfresco Enterprise 3.1 does not currently support all SharePoint features

The following features are not supported:

- Alert me about this document
- Tasks
- Custom metadata
- Publish Back to Source Location
- Create Document Workspace from Alfresco Share Collaboration Site
- Sub sites
- Options