



# Alfresco Guide

*By IT Services*



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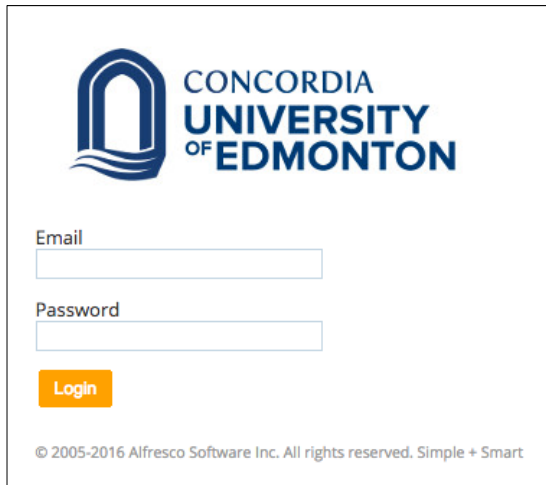
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# Alfresco

## Logging-in

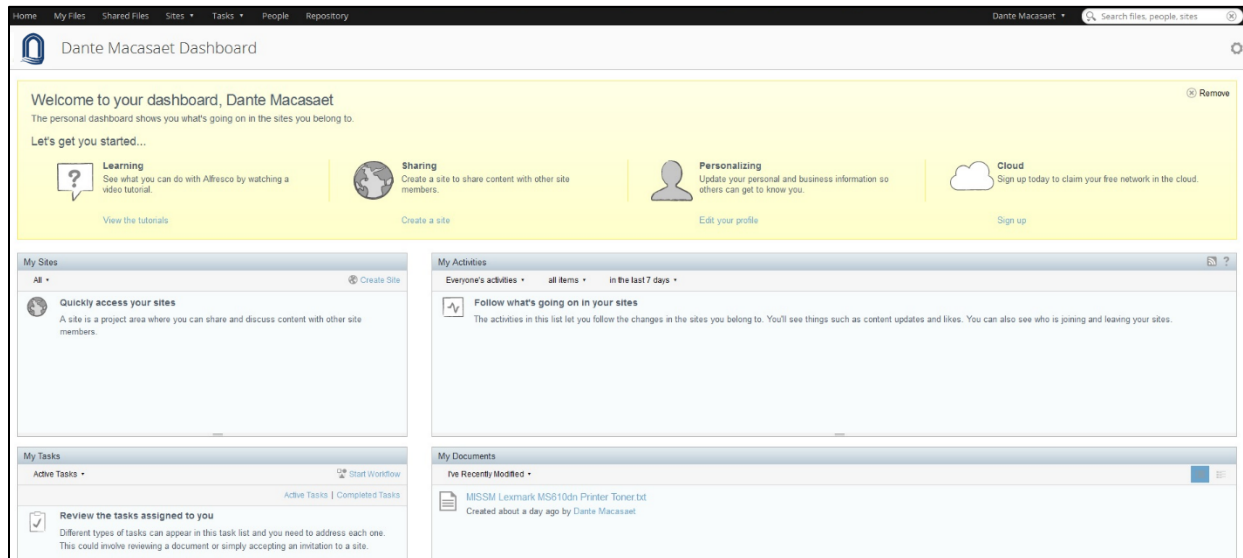
1. From your web browser, go to documents.concordia.ab.ca



The image shows the login page for Concordia University of Edmonton's Alfresco system. At the top left is the university's logo, a stylized 'C' with a wave underneath, followed by the text 'CONCORDIA UNIVERSITY OF EDMONTON'. Below the logo are two input fields: 'Email' and 'Password'. An orange 'Login' button is positioned below the password field. At the bottom of the page, there is a copyright notice: '© 2005-2016 Alfresco Software Inc. All rights reserved. Simple + Smart'.

2. Log-in with your full Concordia email address, and password.

## The Dashboard

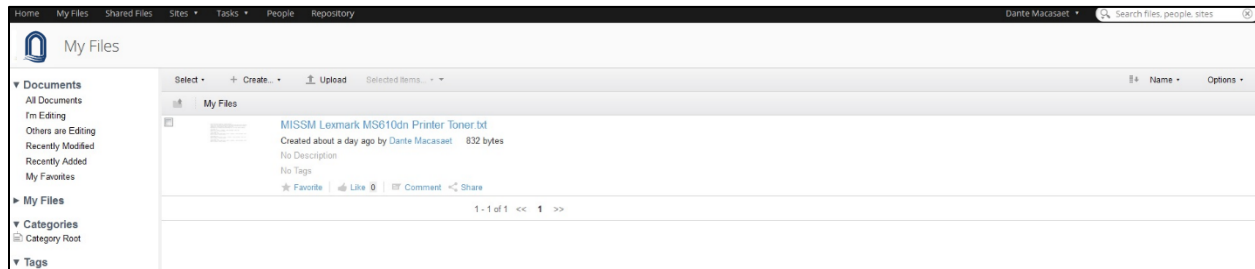


The screenshot displays the 'Dante Macasaet Dashboard' in a web browser. The top navigation bar includes links for 'Home', 'My Files', 'Shared Files', 'Sites', 'Tasks', 'People', and 'Repository'. The main content area is divided into several sections:

- Welcome to your dashboard, Dante Macasaet:** A yellow banner with a 'Remove' button. Below it, a message says 'The personal dashboard shows you what's going on in the sites you belong to. Let's get you started...'
- Let's get you started...:** Four cards with icons and text:
  - Learning:** 'See what you can do with Alfresco by watching a video tutorial.' with a 'View the tutorials' link.
  - Sharing:** 'Create a site to share content with other site members.' with a 'Create a site' link.
  - Personalizing:** 'Update your personal and business information so others can get to know you.' with an 'Edit your profile' link.
  - Cloud:** 'Sign up today to claim your free network in the cloud.' with a 'Sign up' link.
- My Sites:** A section titled 'Quickly access your sites' with a 'Create Site' button. It explains that a site is a project area for sharing and discussing content.
- My Activities:** A section titled 'Follow what's going on in your sites' with a 'Start Workflow' button. It explains that activities show changes in sites, such as content updates and likes.
- My Tasks:** A section titled 'Review the tasks assigned to you' with a 'Start Workflow' button. It notes that different types of tasks can appear and need to be addressed.
- My Documents:** A section titled 'I've Recently Modified' showing a document 'MISSM Lexmark MS810dn Printer Toner.td' created about a day ago by Dante Macasaet.

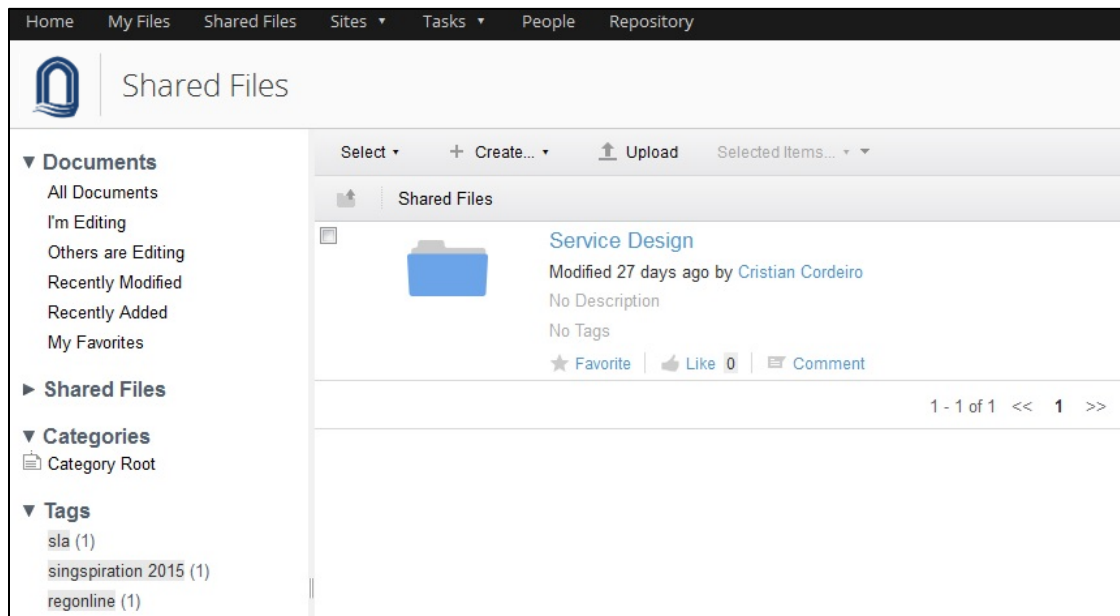


## My Files



The My Files section is the user's personal repository of information. As the owner of all files/folders contained in this storage area, the user has full control of what can be done to their documents.

## Shared Files



This area represents shared data between all users of the local installation of Alfresco.



# Repository

The screenshot displays the 'Repository Browser' interface. At the top, a navigation bar includes links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. Below this, the 'Repository Browser' title is accompanied by a logo. The left sidebar contains a navigation menu with sections: Documents (I'm Editing, My Favorites), Repository, Categories (Category Root), and Tags (sla (1), singspiration 2015 (1), regonline (1)). The main content area features a toolbar with 'Select', '+ Create...', 'Upload', and 'Selected Items...' options. Below the toolbar, the 'Repository' section lists two folders: 'Data Dictionary' (modified about a month ago by System User, user managed definitions, no tags, 0 likes) and 'Guest Home' (created about a month ago by System User, the guest root space, no tags, 0 likes).



## Access Permissions

Alfresco uses *roles* to determine what a user can and cannot do in a space. These roles are associated with *permissions*.

The following table shows each role and the permissions for that role. As a general rule:

- Users have all rights in their *own* spaces
- Administrators have all rights in *all* spaces

All permissions apply to the invited space	Owner	Coordinator	Collaborator	Contributor	Editor	Consumer
See invited space	X	X	X	X	X	X
View content	X	X	X	X	X	X
Copy content	X	X	X	X	X	X
Preview content in template	X	X	X	X	X	X
View content properties	X	X	X	X	X	X
Check in content to invited space	X	X	X		X	
Checkout content to different space	X	X	X		X	
Update/edit content created by other users	X	X	X		X	
Update properties for content created by other users	X	X	X		X	
Edit existing discussions	X	X	X		X	
Create/add new content	X	X	X	X		
Delete content created by other users	X	X				
Create folders	X	X	X	X		
View content rules	X	X	X	X		
Contribute to existing discussions	X	X	X	X		
Invite others	X	X				
Start new discussion topic	X	X	X	X		
Delete content created by other users	X	X				
Same access rights as content owner	X	X				
Take ownership of content	X	X				



## Adding Content

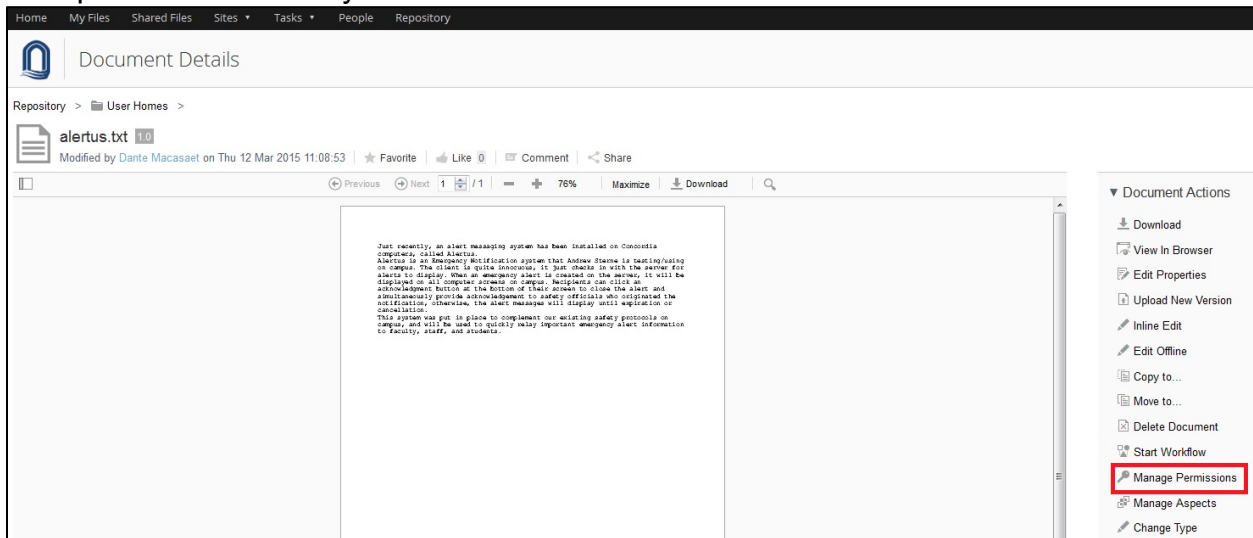
Depending on your access level, you can add content to a site, or to the general Repository, by simply dragging and dropping the files into the location of your choice. As mentioned in previous sections, you can always add any document to the My Files location.

## Sharing Content: Using Permissions

Option 1:

### Allowing others to view your files

1. Open the document you want to share with another user.

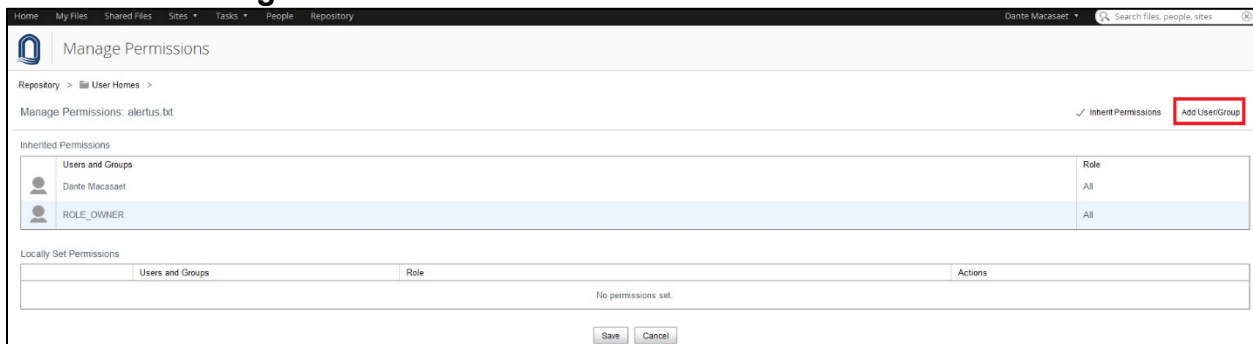


The screenshot shows a document viewer interface. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. Below this, the document title is "alertus.txt" with a version indicator "1.0". The document content is a text file with the following text:

```
Just recently, an alert messaging system has been installed on Concordia
computer, called Alertus.
Alertus is an Emergency Notification system that Andrew Spence is backing/using
on campus. The system is quite sophisticated. It just checks in with the server for
alerts to display, then an emergency alert is checked on the server, it will be
displayed on all computer screens on campus. Recipients can click an
acknowledgment button on the bottom of their screens to close the alert, and
simultaneously provide acknowledgement to safety officials who originated the
notification. Otherwise, the alert messages will display until expiration or
cancellation was put in place to complement our existing safety protocols on
campus, and will be used to quickly relay important emergency alert information
to faculty, staff, and students.
```

On the right side, there is a "Document Actions" menu with the following options: Download, View In Browser, Edit Properties, Upload New Version, Inline Edit, Edit Offline, Copy to..., Move to..., Delete Document, Start Workflow, **Manage Permissions** (highlighted with a red box), Manage Aspects, and Change Type.

2. Click on **Manage Permissions**.



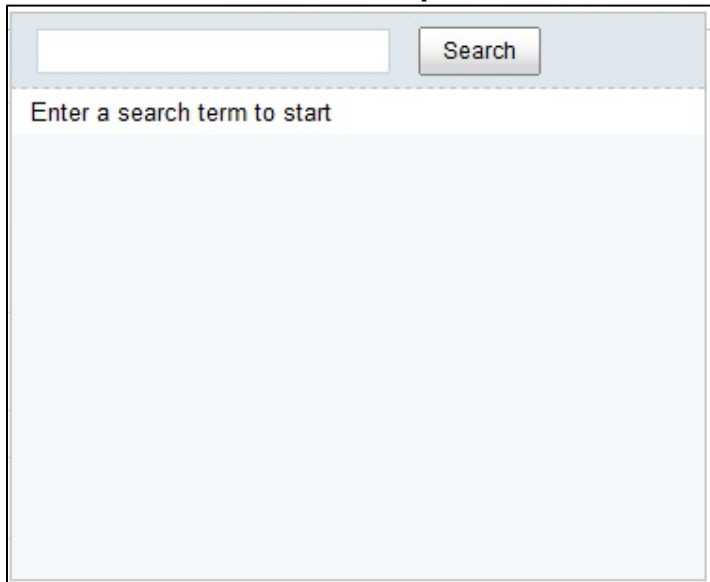
The screenshot shows the "Manage Permissions" interface. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. Below this, the document title is "alertus.txt". The "Manage Permissions" section shows the following table:

Inherited Permissions	
Users and Groups	Role
Dante Macasaet	All
ROLE_OWNER	All

Below the table, there is a "Locally Set Permissions" section with a table that is currently empty. The text "No permissions set." is displayed below the table. At the bottom, there are "Save" and "Cancel" buttons.



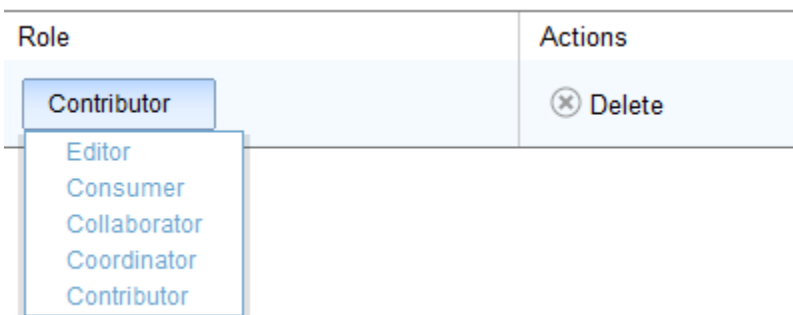
3. Click on **Add Users/Groups**.



The screenshot shows a search interface. At the top, there is a text input field and a button labeled "Search". Below the input field, the text "Enter a search term to start" is displayed. The main area below is a large, empty light blue box, likely intended for displaying search results.

4. Type-in the name (or partial name) of the individual/group, you want to provide access to this file, click **Search**, and choose from the list that the system provides by clicking on **Add**.

5. When the user is added, the default access given is Contributor. To change the level of access you are granting to this individual or group, click on the Contributor button, and choose from the options provided.



The screenshot shows a table with two columns: "Role" and "Actions". The "Role" column contains a dropdown menu with the following options: Contributor, Editor, Consumer, Collaborator, Coordinator, and Contributor. The "Actions" column contains a button labeled "Delete" with a trash icon.

Role	Actions
<b>Contributor</b> Editor Consumer Collaborator Coordinator Contributor	⊗ Delete

6. Click on **Save**.





Option 2:

## Sharing Content: Creating Sites

An Alfresco site is a project area where you can share content and collaborate with other site members. A site can either be designated as public or private.

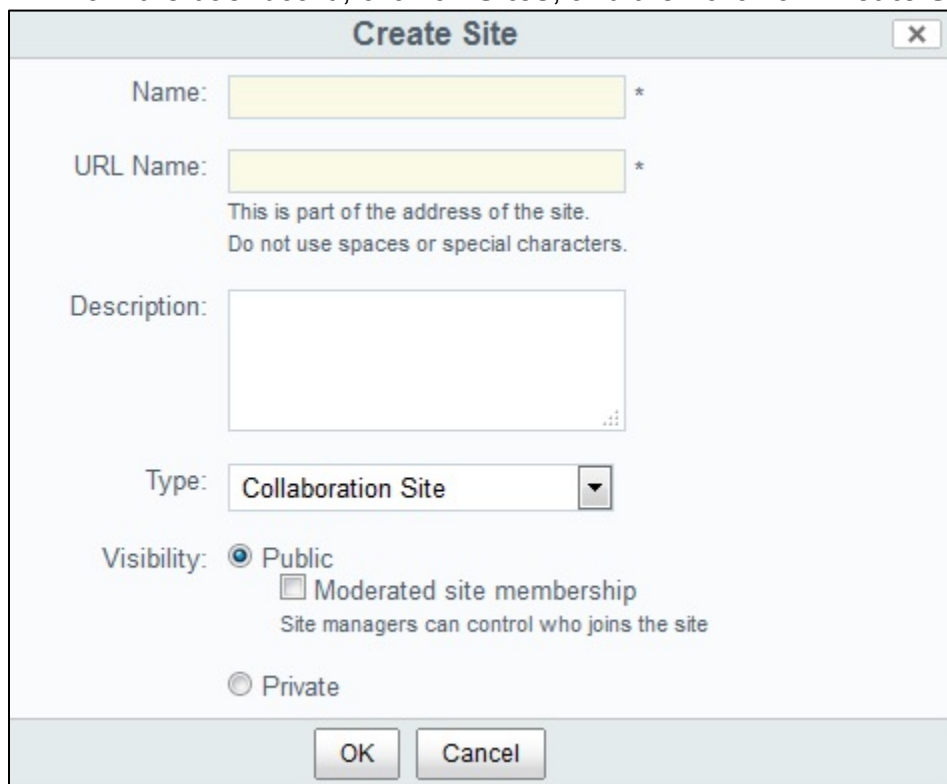
If a site is designated as public, all users can view the content but only site members can work with the content. However, any user can join the site.

A slight variation of the public site is the moderated public site. All users can access the site but only site members can see and work with the content. Users wanting to join the site must be given explicit permission to do so.

In a private site, only site members can access the site, and other users must be invited to join the site.

### Creating a Site

1. From the dashboard, click on **Sites**, and then click on **Create Site**.



**Create Site**

Name:  \*

URL Name:  \*

This is part of the address of the site.  
Do not use spaces or special characters.

Description:

Type:  ▼

Visibility:  Public  
 Moderated site membership  
Site managers can control who joins the site  
 Private

2. Provide a site name, description, and determine its visibility.

3. Click **OK**.



## Using Workflows

A workflow is a work procedure outlining steps that represent the activities users must follow in Alfresco to achieve a desired outcome. You can define your own content-oriented workflows. Alfresco provides two different types of workflow: simple workflow and advanced workflow.

### Simple workflow

Simple workflow defines content rules for a space. The content rule dictates how the content entering, leaving, or currently residing in the space is managed. Each workflow definition is restricted to a single state.

### Advanced workflow

Advanced workflow is any workflow constructed using Alfresco's embedded workflow engine. Alfresco includes two out-of-the-box workflows, which are both basic examples of advanced workflows:

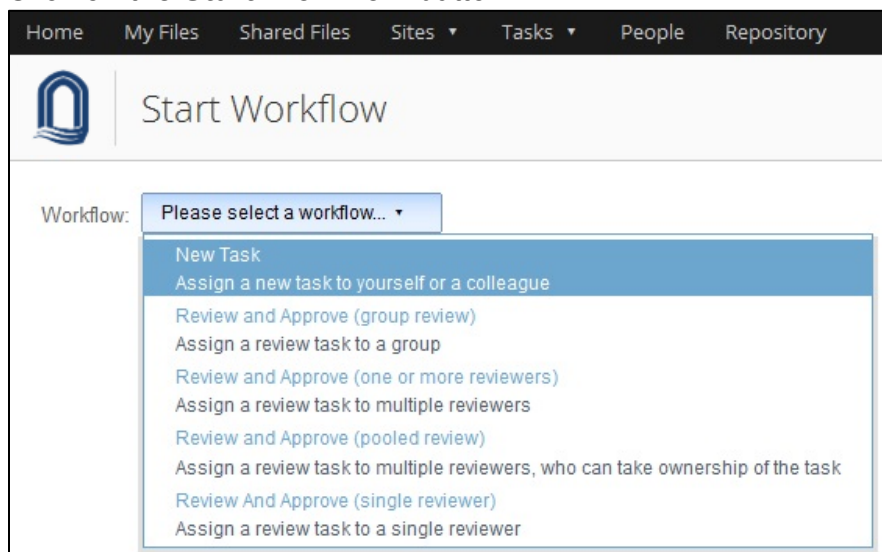
- Ad-hoc Task (for assigning a task to a colleague)
- Review & Approve (for setting up review and approval of content)

In the above examples, the content items are attached to the workflow.

## Creating Workflows

### Option 1:

1. From the dashboard, click on **Tasks**, then choose **Workflows I've started**.
2. Click on the **Start Workflow** button.



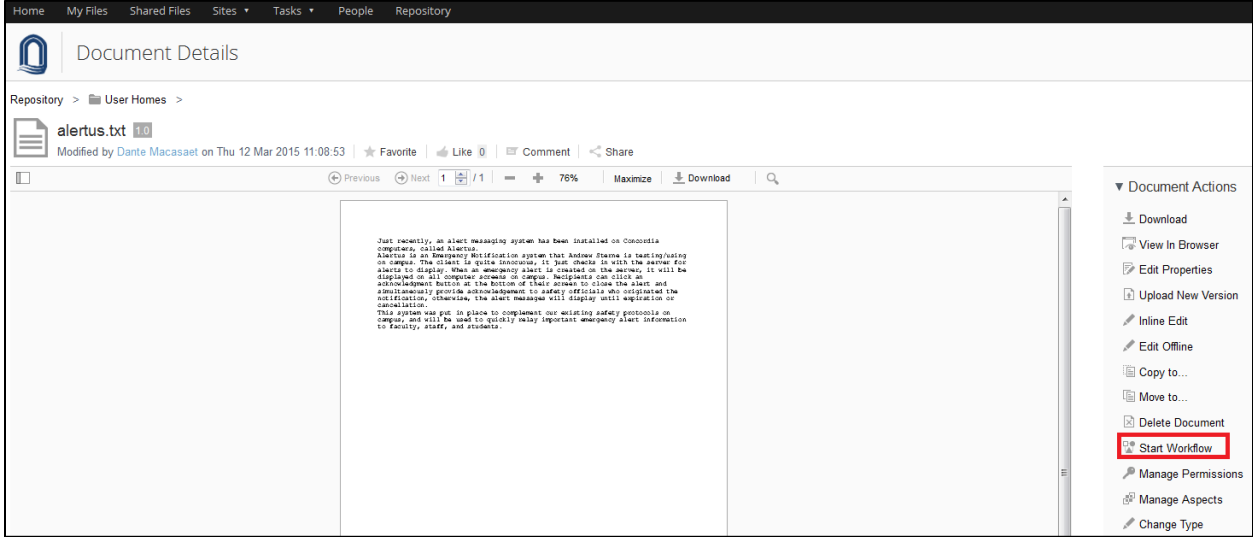
3. Choose **New Task**.



4. Fill-in the relevant information: message, due date, priority, assignee, items, email notification.
5. Click on **Start Workflow**.

**Option 2:**

1. Open the document you want to include in your workflow



2. Click on **Start workflow**.
3. Follow the same process as Option 1.



## Reviewing and Approving Workflows

A Review and Approval workflow is focused on tracking the review of critical documents in a review process, which provides a good audit trail to determine if certain processes are being met and practiced.

Several forms of review and approve workflows are provided in the next pages.

### Review and Approve (single reviewer)

This option allows you to set up review and approval of content, assigning the workflow task to a single user.

The screenshot shows a web application interface for starting a workflow. At the top, there is a navigation bar with links: Home, My Files, Shared Files, Sites, Tasks, People, and Repository. Below the navigation bar is a header area with a logo and the text 'Start Workflow'. The main form area is titled 'Workflow: Review And Approve (single reviewer)' and includes a '\* Required Fields' indicator. The form is divided into several sections: 'General' with a 'Message:' text area and a '?' icon; 'Due:' with a date picker (DD/MM/YYYY) and a 'Priority:' dropdown menu set to 'Medium'; 'Assignee' with a 'Reviewer: \*' label and a 'Select' button; 'Items' with an 'Items:' label, a list box containing 'No items selected', and 'Add' and 'Remove All' buttons; and 'Other Options' with a checked checkbox for 'Send Email Notifications'. At the bottom of the form are 'Start Workflow' and 'Cancel' buttons.



## Review and Approve (group review)

This option allows you to set up review and approval of content, assigning the workflow task to a single group. A required percentage of approvals is set up to determine document approval.

The screenshot shows the 'Start Workflow' interface for the 'Review and Approve (group review)' workflow. The interface is divided into several sections:

- Workflow:** A dropdown menu set to 'Review and Approve (group review)'. A note '\* Required Fields' is visible on the right.
- General:**
  - Message:** A large text area for entering a message, with a question mark icon on the right.
  - Due:** A date picker field with a calendar icon and the format 'DD/MM/YYYY' below it.
  - Priority:** A dropdown menu currently set to 'Medium'.
- Assignee:**
  - Review Group:** A dropdown menu with a 'Select' button below it.
  - Required Approval Percentage:** A text input field containing '50' and a question mark icon.
- Items:**
  - Items:** A list box containing 'No items selected'.
  - Buttons:** 'Add' and 'Remove All' buttons.
- Other Options:**
  - Send Email Notifications

At the bottom of the form are two buttons: 'Start Workflow' and 'Cancel'.



## Review and Approve (one or more reviewers)

Also known as a parallel review and approve, this option allows you to set up review and approval of content, assigning the workflow task to multiple users.

The screenshot shows the 'Start Workflow' interface with the following elements:

- Navigation bar: Home, My Files, Shared Files, Sites, Tasks, People, Repository
- Workflow selection: Review and Approve (one or more reviewers)
- Required Fields indicator: \* Required Fields
- General section:
  - Message: [Text area with a help icon ?]
  - Due: [Date picker] (format: DD/MM/YYYY)
  - Priority: Medium (dropdown menu)
- Assignees section:
  - Reviewers: \* [Select button]
  - Required Approval Percentage: \* 50 (input field with a help icon ?)
- Items section:
  - Items: [List area showing 'No items selected']
  - Buttons: Add, Remove All
- Other Options:
  - Send Email Notifications
- Bottom buttons: Start Workflow, Cancel



## Review and Approve (Pooled reviewer))

Also known as pooled review and approve, this options allows you to set up review and approval of content, assigning the workflow task to multiple users. One user can take ownership of the task at a time, completing it or returning it to the pool to be claimed by another user associated with the task.

Home My Files Shared Files Sites Tasks People Repository

Start Workflow

Workflow: Review and Approve (pooled review) \* Required Fields

General

Message: ?

Due: DD/MM/YYYY Priority: Medium

Assignee

Review Group: \*  
Select

Items

Items: No items selected  
Add Remove All

Other Options

Send Email Notifications

Start Workflow Cancel

