Alfresco Mobile *for Android*

User Guide Android App Version 1.2

Get Started with Alfresco Mobile

Here's a quick guide to setting up Alfresco Mobile and using it's key features (all features are the same on both tablet and smartphone unless otherwise noted).

Setting up Alfresco

When you first install and access Alfresco Mobile, you'll see the **Select Account** page.

New to Alfresco?

If you're new to Alfresco, you can create a free online account.

1. Tap **Sign up**.

2. Enter your name, your email address, a password of six characters or more, and then tap **Sign Up**.

   Alfresco checks your sign up details and sends an account confirmation link to your email address so you can complete the registration. You'll see a status message to show that your account is waiting for email verification.

3. Check your email for the confirmation from Alfresco, then select the **Activate account** link in the email to complete the registration process.

   If you're not receiving an email, tap **Resend Email** for Alfresco to resend the email verification. You might also check that you entered the email address correctly and look in your spam folder.

4. To check progress, tap **Refresh**.

Already have an Alfresco account?

If you're already an Alfresco user, you'll probably want to connect to your Alfresco Cloud account or an instance of Alfresco.

Connect to an Alfresco in the cloud account

 Alfresco Cloud

1. Tap **Alfresco Cloud**.

   The Account Information page shows that you're trying to access your Alfresco Cloud account with the login email address and password that you enter.

2. Enter your login email address and password.

3. Tap **Allow** to give Alfresco Mobile access to your Cloud account.

The next time you access Alfresco Mobile, you can go directly to your Alfresco Cloud account by tapping **Alfresco Cloud** in the Accounts section. You may be asked to Allow Alfresco to give access to your Cloud account again.

Tap **Repository** or **Sites** to get started with Alfresco.

Connect to an Alfresco server

Alfresco Server

1. Tap **Alfresco Server**.

2. Enter your user name and password.

3. Enter the Hostname, which is the URL of the Alfresco server. It may look something like this: example.alfresco.com

4. Change the description if you like.

5. If you usually access Alfresco with a URL that starts with https://, tap the **HTTPS** checkbox.

6. Tap **Save**.

   The next time you access Alfresco Mobile, you can go directly to your account by tapping **Alfresco Server** (the name you typed into the Description) in the Accounts section.

   Tap **Repository** or **Sites** to get started with Alfresco.

How do I set up more accounts?

The Accounts section shows all the accounts that you have set up.

1. In the Accounts section, tap **Manage accounts**.

2. To set up a new account connection, tap 🔑+ and then tap either Alfresco Cloud or Alfresco Server.

3. Enter your account details.

4. Connect to your Alfresco Cloud or Alfresco Server account.

Troubleshooting

I'm unable to connect to Alfresco Cloud.

1. Check that you're using the right login email address and that your password matches the login email.

2. Test the connection to Alfresco Cloud from a browser by typing http://my.alfresco.com in a browser window.

3. If you're still having trouble connecting, go to https://getsatisfaction.com/alfresco.

I'm unable to connect to Alfresco on-premise.

1. Check that you're using the right login and password.

2. Test the connection to Alfresco on-premise from a browser by typing *http(s)//hostname:port/alfresco* in a browser window.

3. If a connection is established from the browser, but you still can't connect from Alfresco Mobile, tap the account then tap **Manage Accounts** then 🖋 **Edit**.

4. Change the Service URL value to */alfresco/service/cmis* then tap **Save**.

5. If you're still having trouble connecting, please contact your Alfresco administrator.

Settings

Tap **Settings** to change security options and access Alfresco links.

Enterprise Settings

Data Protection: The first time you add an Enterprise or premium cloud account you will be asked if you want to protect your data.

Data protection means that documents downloaded from Alfresco Mobile can only be viewed from within Alfresco Mobile. Tap **Data Protection** to switch this feature on or off.

If you have data protection switched on then documents downloaded from all your accounts will be protected. Protection will be removed if you delete all of your Enterprise or premium cloud accounts.

Passcode Protection: Tap **Passcode Protection** to open a new screen where you can turn passcode protection on and off. When you switch Enable Passcode to **ON**, you can choose a 4-digit passcode. This passcode will have to be entered

before the Alfresco Mobile app can be used on your device. Tap **Expiration** to set the length of time Alfresco Mobile remembers the passcode for.

You can change your passcode at any point by tapping **Change Passcode**.

For added security you can select the **Erase Data** option so that all data downloaded from Alfresco will be removed from the device after 10 failed passcode attempts.

Favorites

Enable Sync: Available for all the Alfresco accounts you have setup on your device, this feature lets you keep your favorites documents automatically in sync with your device.

Alfresco Mobile can synchronize the favorite documents in your Alfresco accounts. Favorite documents can be from your device or your desktop. When you are online, if sync is activated, your favorite documents will automatically sync to your device. This setting means that your favorite documents are always up to date, and available even when you are offline.

The first time you tap the Favorites tab or the first time you favorite an item in Alfresco Mobile, you are asked whether you want to keep your favorites documents automatically in sync with your device. Tap **Yes** to enable the feature for the Alfresco account that you're currently using.

Data Usage: When **Activate Sync** is selected, you can turn the **Data Usage** option on or off. If you want to reduce your data usage then turn it off; your favorites will only be synced when you refresh them in the Favorites folder.

❖ This option is only shown on devices that support cellular networks.

Links

Tap a link to visit the Alfresco website, leave a review of Alfresco Mobile on Google Play, or like Alfresco on Facebook.

Using Alfresco

Once you've connected Alfresco Mobile to your Alfresco account it's time to start finding, downloading, and using your Alfresco content.

❖ Throughout Alfresco you'll see the ◢ icon – tapping this is like right-clicking on a mouse, and gives you additional options.

Home panel

When you start up Alfresco Mobile, you'll see a list of options including choosing an Alfresco site, searching for content, viewing site activity, and viewing local files on your device.

❖ You can tap 🌀 from anywhere in the app to show and hide the Home panel. Use your device's back button to move back through Alfresco.

Home panel summary

Tap the controls to:

Accounts: Switch between or manage Alfresco accounts.

Activities: View a list of recent activities in your sites.

Repository: View a directory tree of your sites, folders, and documents, and easily navigate to your documents.

Sites: Choose the site that you want to view content on.

Favorites: When **Activate Sync** is on for this account, view the synced documents in your Alfresco accounts, even when you're not online.

Search: Search for content.

Local Files: View content stored on your device.

Notifications: View records of uploaded and downloaded documents and favorite syncs - see Monitoring upload and download status.

Help: Get help!

About: View Alfresco Mobile app details.

Accounts

With Alfresco Mobile you can connect Alfresco to as many of your Alfresco on-premise and cloud accounts as you want. Tapping on the account displays a menu where you can select to switch to another account, manage you accounts, or switch networks.

Manage your accounts

Tap the current account then tap **Manage Accounts** to show your existing accounts.

Tap to add a new account, or tap an existing account to:

Edit: Edit the account details.

Delete: Delete the account from Alfresco Mobile.

❖ The Alfresco account is not permanently deleted – it is removed from your Alfresco Mobile app but still available through Alfresco on-premise/cloud.

Browse Documents: Switch to the selected account and open the Home panel so you can browse content.

Switch networks

If you have accounts on more than one company network you can tap the current account then tap **Switch networks** to select from other available networks.

❖ Alfresco networks are based on your email address, so if you have a *me@alfresco.com* email address and a *me@examplecompany.com* email address, then you can work on both the *alfresco* and the *examplecompany* networks.

Navigating documents

You can access your documents through the repository or through the Alfresco sites that they are stored on. <mark>You can also access local files stored on your device.</mark>

You can tap ↻ to refresh the content in a repository or a site.

Repository

Tap **Repository** and then you can tap to drill-down through the all content available to you. The repository is particularly useful if you want to find content outside of site document libraries, such as in wikis or blogs.

Sites

Sites give you direct access to your document libraries and are the quickest way to access your content. Tap **Sites** and you'll see a list of sites that belong to the account you're currently using. You can filter the view of sites you see to your Favorite Sites, sites that you're a member of (My Sites), or All Sites you have access to.

You can tap ◤ to join a site that you aren't yet a member of, or leave or favorite/unfavorite a site that you're a member of.

Tap ⁝ to display a list of sites where your membership is waiting confirmation from the site manager.

If you have multiple accounts set up in Alfresco Mobile, first select the account you want to use. Tap on a site to view its Document Library and navigate through the folders until you find the document you're looking for.

❖ <mark>The current site or folder is displayed at the top of the screen. Tap ◤ to navigate through the site levels.</mark>

Site actions

When you're in a site or folder in which you have permissions to upload or edit content (permissions are set in Alfresco by site managers).

Tap 📁+ to create a new folder, or, tap ⊕ to:

Create: Create a new document and then save it back to Alfresco, adding tags if you want.

❖ If you select to create a **Text Document** using the **Alfresco Text Editor**, you can tap 🎤 to create it using speech-to-text if you're online.

Upload: Choose documents to upload to Alfresco – see Uploading Documents for more details.

Take photo: Take a new photo.

Record video: Make a new video.

Record audio: Record and upload audio.

Uploading documents

When you select to upload documents you can choose to upload **Photos**, **Videos** or **Files**, or to upload from **Another application.**

When you've chosen the type, tap ◢ to find your documents or 🌀 to cancel.

You can upload single or multiple items. If you upload a single item you can add a name and Alfresco tags to the upload (either create new tags or select from existing Alfresco tags). When you're finished tap **Confirm**.

To upload multiple items tap and hold on an item to activate multi-selection, then tap on further items to select them all at the same time. When you have multiple items selected you can tap ⋮ to select all, ⬆ to upload the selected items, or **Done** to undo the selection.

Working with documents

Once you navigate to a document you want to view, tap on the document to preview it.

Document actions

When you have a document open in Alfresco Mobile, you can see some or all of these actions, depending on your permissions:

Open in...: Tap ➜ and choose a compatible application on your device to open a copy of the document. When you have edited the document save it in the app you're using for editing, and any changes will be applied to the Alfresco version of the document.

Favorite: Tap ☆ to mark the document as a favorite. You'll then be able to see this document in the **Favorites** tab and keep it in sync when the sync feature is activated.

Like: Tap 👍 to show that you like or approve a document.

Share attachment: Tap ⤳ to share the document as an attachment in another app, such as an email app. You can even share to another Alfresco account.

Download: Tap ⬇ to download a copy of the file for offline viewing. The file is available in Alfresco **Local Files**.

Upload: Tap ⬆ to upload a new version of the document from Alfresco **Local Files** folder or another application. This will overwrite the current Alfresco version.

Edit: Tap ✎ to change the document properties.

Delete: Tap 🗑 to delete the document from the Alfresco site.

Multi-select

If you tap and hold on a document or folder you activate multi-selection – tap on further items to select them all at the same time. When you have multiple items selected you can download, favorite/unfavorite, like/unlike, or delete them, all at the same time.

Tap an item a second time to deselect it or tap **Done** to turn off the multi-selection.

Tap ⣿ to **Select All**.

❖ You can't preview when you have multiple items selected.

Document view options

When you have a document open in Alfresco Mobile, you can see the following view options (on some devices you will need to use the back button to move between views):

Preview: The default document view. You can tap the preview of a document to open it for editing.

❖ If you are using an smartphone then the properties and version are also displayed with the document preview on the Details screen.

Properties: Tap to view the document properties (tablet only).

Versions: Tap to view the document versions (tablet only).

Comments: Tap **Comments** or ⊜ to view existing comments and add your own. When you have entered a comment tap ➤ .

Tags: Tap **Tags** or ✎ to view document tags.

Folder actions

Tap ◢ on a folder to:

View Properties for a folder.

Edit Properties for a folder.

Delete a folder from Alfresco.

Working with favorites

Tap **Favorites** to give you quick access to all your favorite documents, whether you're online or offline (if the feature is enabled).

Alfresco Mobile can automatically sync with your Alfresco accounts so that you can see the documents that you set as favorite in Alfresco.

You can make any document a favorite by tapping ☆, either when you're using your Alfresco account from your desktop, or from Alfresco Mobile.

The first time you tap **Favorites**, or the first time you favorite an item in Alfresco Mobile, you'll be asked whether you want to keep your favorites documents automatically in sync with your device. Tap **Yes** to sync your favorite documents for this account (this switches on **Enable Sync** in the Settings for the account you're using).

When you're online, your favorite documents will automatically sync to your device. This means that your favorite documents are always up to date.

If you're working offline or if you can't connect to your Alfresco account, you'll still be able to see your synced documents. The next time you are back online, Alfresco Mobile will automatically sync your favorite documents again.

If you switch off **Enable Sync** at any point, when you tap **Favorites**, you see the favorite documents only when you're connected.

Searching for content

Search for content quickly within your Alfresco accounts or when browsing in folders.

Tap **Search** 🔍 on the Home panel to search an account, or 🔍 when browsing a site or folder to search only the site or folder.

Type your search text in the search box and tap 🔍 on your device keypad. Tap a document name in the Search Results list to view it. You can check the location of the document by looking at the Path in the document properties.

Monitoring upload and download status

Alfresco Mobile keeps a record of uploaded and downloaded documents and favorite syncs, so that you can check the success of your operations.

Open the status viewer by tapping **Notifications** on the **Home** panel, or by tapping on an Alfresco upload or download notification on your devices' Notifications (identified by 🏵) .

Successful operations are marked with a ✓, failed or incomplete operations are marked with a ✕.

Tap ✓ for an item to remove it from the list, or tap **Clear All** to clear the list completely. Tap **Cancel All** to cancel all operations that have failed or not been completed, or ✕ to cancel a specific operation, and if you want try them again tap ↻.

Working with Local Files

The documents that are stored on your device are listed in the **Local Files** folder.

In this folder you can access your **Alfresco Local Files** folder, **Device Shortcuts**, and your devices' **Library**. This is a great way to search you device for content that you want to view or upload to Alfresco.

Items in **Alfresco Local Files** may have been downloaded from Alfresco to store locally, or sent to Alfresco Mobile from another app. All local files, including items in **Alfresco Local Files**, can be accessed when you are offline.

Tap on an item to open it in a compatible app where you can edit it and save it back to your local files.

You can tap ◢ on an item in the **Alfresco Local Files** folder to **Upload**, **Share**, **Rename**, or **Delete** it.

❖ When working with local files through **Device Shortcuts** or in your device **Library**, the **Rename** and **Delete** options aren't available.

Tap on an item to open it in an associated app.

As elsewhere you can tap and hold to multi-select local files, with options to **Upload** ⬆ , **Share** ⬉ , **Delete** 🗑 or **Select All** ⁞.

Uploading documents from third-party apps

You can use the Share option in other Android apps to upload documents to Alfresco. Just select Alfresco from the list of apps, and you can tap ◢ to choose which account, site, and folder to upload the document to.

You can name the document and add tags and a description, and if a document with that name already exists in the location, then you'll be prompted to rename your document. This means that you can't accidentally overwrite existing content.

❖ If you are uploading multiple documents you can't name a document or add tags and descriptions at this point.