Alfresco Mobile *for iOS*
User Guide App Version 2.0

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

Setting up Alfresco

When you first install and access Alfresco Mobile, you can connect to an existing account or create a new account.

New to Alfresco?

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

1. Tap **Sign up for Alfresco Cloud**.

2. Enter your name, your email address, a password, and then tap **Sign Up**.

    You'll be emailed a confirmation link so you can complete the registration.

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 don't receive an email, tap **Resend Email** for Alfresco to resend the email verification. 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 existing Alfresco account.

Tap **I already have an account**.

❖ The first time you connect to an Alfresco One or an Alfresco Cloud Enterprise Subscription account, you'll be asked if you want to enable file protection for your downloaded documents. Tap **Yes** to activate the file protection. See **Settings** for more details.

Connect to an Alfresco in the cloud account

1. Tap **I already have an account**.

2. Tap **Alfresco Cloud**.

3. Enter your login email address and password.

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

   If you have multiple accounts set up then tap ⭘ next to this account and Alfresco Mobile will switch to this account ✅. This stays selected until you switch again.

Connect to an 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 *example.alfresco.com* .

4. Change the description if you like.

5. If you usually access Alfresco with a URL that starts with https://, make sure the **HTTPS** option is selected.

6. Select **Sync Favorite Content** to keep your favorite content automatically in sync with your device.

   Alfresco Mobile can synchronize Alfresco files you've favorited, both on your device or your desktop. If you select this option then when you're online your favorite documents will automatically sync to your device. This means that your favorite documents are always up to date, and available even when you're offline.

   You can also select this option the first time you tap Favorites.

   Most people won't use the Advanced settings, but the Troubleshooting section below has more details if you want to use them.

7. Tap **Save**.

   If you have multiple accounts set up then tap ⭘ next to this account and Alfresco Mobile will switch to this account ✅. This stays selected until you switch again.

How do I set up more accounts?

1. Tap your photo, or the ⊘ icon if you don't have a profile photo for the currently selected account.

    You'll see the accounts that you've already set up.

    - ☁ indicates Alfresco Cloud accounts

    - ▤ indicates Alfresco One and Alfresco Community server accounts

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

3. Enter your account details and tap **Save**.

Troubleshooting

I can't 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.

I can't connect to Alfresco One or Alfresco Community.

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

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

3. Check the Advanced account settings:

    - **Port**: Alfresco Mobile selects the port number automatically, but your company may be using a different number. Ask your Alfresco administrator if you need to use a different port number.

    - **Service Document**: Alfresco Mobile is set up with the default Alfresco service document string. Ask your Alfresco administrator if your company uses a different string.

    - **Client Certificate**: Alfresco Mobile doesn't use a client certificate by default. Ask your Alfresco administrator if your company account requires client certification. If needed you can tap **Client Certificate**, then **Import Client Certificate**, and choose a previously downloaded certificate from your Alfresco Local Files.

Settings

You can access Alfresco settings from the sidebar in Alfresco Mobile.

Tap ⚙ to access settings.

About

Tap to view the Alfresco Mobile version number.

Cellular Sync

If the **Sync Favorite Content** option is selected then by default favorited content will still be synced when there is no Wi-Fi connection. This can affect your data usage. Switch this off to only sync when a Wi-Fi connection is available.

Send Diagnostics

Alfresco Mobile collects anonymous technical diagnostic data for use when developing the Alfresco app. Switch off this option to disable this feature.

File Protection

The first time you add an Alfresco One or Alfresco Cloud Enterprise subscription account you'll be asked if you want to protect your files.

File protection means that files in your devices Alfresco Mobile Local Files are encrypted when the device is locked, and cannot be opened from any external device that's connected to this device. Tap **File Protection** to switch this feature on or off.

If you have file protection switched on then files downloaded from all your accounts will be protected. Protection will be removed if you delete all of your Alfresco One or Alfresco Cloud Enterprise subscription accounts.

- ❖ If you have File Protection switched on then your Local Files are encrypted when the device is locked, and cannot be opened from any external device that's connected to this device.

Using Alfresco

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

All Alfresco content is stored in sites, with different sites designed to hold different types of content.

Alfresco Mobile overview

The Alfresco Mobile display is split into three main areas; Sidebar, Lists, and Preview.

The iPhone shows just one of these areas at a time and you can swipe between them.
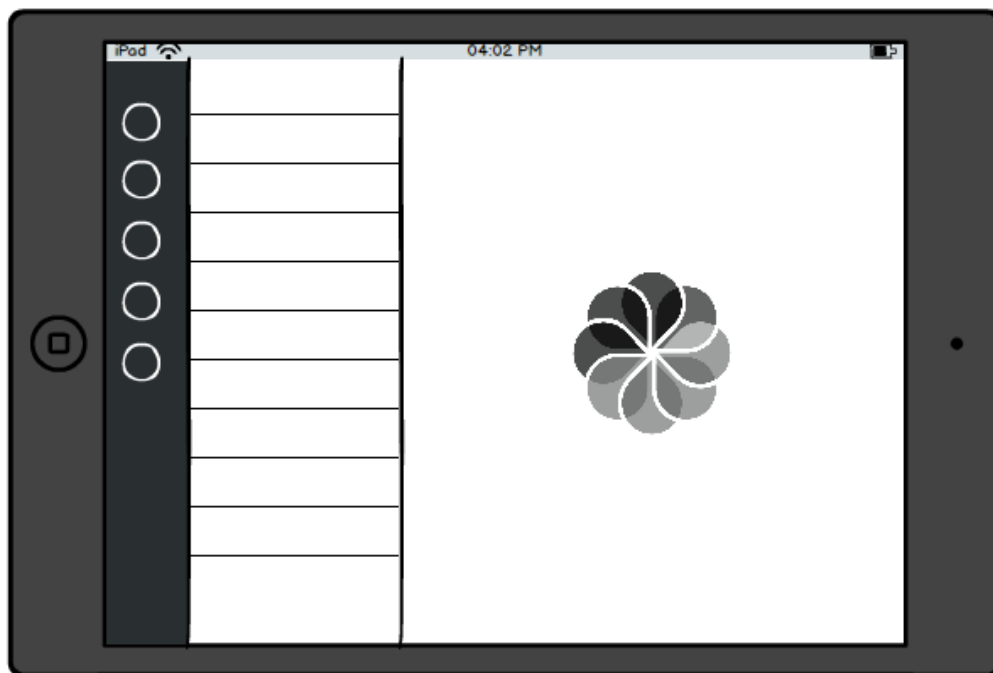
Sidebar

The icons here give you access to all the Alfresco Mobile features. You can slide the Sidebar in and out to display more detail.

❖ Some options are only available for connections to the latest version of Alfresco One.

⊗ **Accounts:** Switch between or manage Alfresco accounts.

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

⊘ **Tasks**: View a list of tasks assigned to you.

☆ **Favorites**: View content you've favorited. When **Enable Sync** is on for this account, you can view Alfresco content that you've favorited, even when you're not online.

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

▱ **Shared Files:** View content that's shared in Alfresco but not added to a site.

▱ **My Files:** View your private content. Only you can access this area.

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

⊡ **Local Files:** View content stored on your device.

⚙ **Settings**: Open Alfresco Mobile settings.

⦵ **Help**: Get help!

Lists

Displays the results of your selection in the Sidebar. For example, if you selected **Tasks**, then a list of tasks assigned to you will be displayed, if you selected **Favorites** then all the files and folders you've favorited will be displayed, and so on.

Tap a task or file to display a preview or tap a site to list the site contents.

If you're in a site then at the top of the list is a ‹ icon that you can tap to go back a level.

Tip: Pull down on lists to refresh them.

Preview

Displays a preview of the currently selected file or task and further options. The preview is displayed until another selection is made.

Accounts

With Alfresco Mobile you can connect to as many of your Alfresco server and cloud accounts as you want.

Alfresco Mobile is device-specific, so you can connect to different accounts using different devices.

Tap the ⊗ account icon (or your profile picture) to list your accounts. You can add a new account, switch to another account, and manage your accounts.

Create: Tap + to add a new account.

Switch: If you have multiple accounts set up the currently selected account is shown with the ✓ icon. Tap ◯ next to another account to switch to that account.

Edit: Tap on an account name to edit the account details.

Delete: To delete an account tap the account and swipe to the left to show a Delete button. Tap this to delete the account.

> ❖ The Alfresco account is not permanently deleted, the connection is just removed from your Alfresco Mobile app on this device.

Navigating Alfresco

You can access content through the repository or through the Alfresco sites that it's stored on. You can also access local files stored on your device.

You can pull down to refresh the content list 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

Alfresco sites are where content is directly stored and are the quickest way to access 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.

Tap ⌄ for options to join or leave a site and favorite/unfavorite a site that you're a member of.

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 tap on folders to navigate through them until you find the item you're looking for.

❖ The current site or folder name is displayed at the top of the screen.

Site options

When you're in a site all its files and folders are listed.

Tap on a file to preview it, or tap on a folder to list its contents.

Tap ‹ **Back** to go up a level in the site, or if you're at the top level tap ‹ **Sites** to go back to the list of sites.

Adding content to a site

When you add content to a site it's added to the currently displayed location in the site list.

❖ You can only add content to a site if the site manager has given you the required permissions.

Tap **+** to:

Create File: Create a new file and save it to Alfresco, adding tags if you want.

❖ You can tap 🎤 to create it using speech-to-text if you're online.

Create Folder: Create a new folder and save it to Alfresco.

Upload: Select photos or videos or choose local files to upload to Alfresco.

Take photo or video: Take a new photo or video.

Record audio: Record and upload audio.

Deleting content from a site

To delete a file or folder tap it and swipe to the left to show a Delete button. Tap this to delete the file/folder.

❖ If you delete a folder then all its contents are also deleted.

To delete multiple files click **Edit** then select all of the files you want to delete.

When you're done click **Delete**, then **Delete** again to confirm.

❖ The content you can delete depends on the permissions the site manager has given you.

Working with content

Tap on a file in the files list to preview it.

Tap (i) to see folder details.

As well as a preview, you'll have some or all of the following actions available, depending on if you selected a file or folder, and on your permissions:

☆ **Favorite**: Mark a file or folder as a favorite. You can quickly find favorites when you tap ⊛ **Favorites**, and even view them when you're offline if the Enable Sync feature is switched on. Tap again to unfavorite.

👍 **Like**: Like or approve a file or folder.

✓ **Review**: Set up a review for a file and assign it as a task to other users. See Working with tasks.

💬 **Comment**: View existing comments or post your own comment.

🖊 **Edit**: Available for text files, you can open them up directly in Alfresco and make changes before selecting to **Save** or **Discard Changes**.

📤 **Update**: Select a new version of a file from your Local Files, choose if there are major changes or not (this affects the version number), and add comments (optional).

↗ **Open in...**: Choose a compatible app on your device to open a file in. When you've edited the file some apps let you **Save Back** straight to Alfresco, with others you need to save to your device and then upload to Alfresco.

❖ If the file you're trying to open doesn't have a file extension, you'll see No Applications Available.

✉ **Email**: Open an new draft email with the file attached.

🖨 **Print**: Print the file to a compatible AirPrint printer.

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

✕ **Delete**: Delete the file or folder from the Alfresco site.

📁 **Add Folder**: Add a new folder within the currently selected folder.

Preview options

At the top of the Preview are several buttons. You can switch between them to see different types of content information.

iPhones display just the icons whilst iPads display the full description.

❖ The Preview and History buttons are for files only, not folders.

🗋 **Preview**: Displays a file preview that you can scroll through and zoom in and out on. You can also play video previews.

☰ **Properties**: Displays file or folder properties.

🕐 **History**: Displays details on all versions of the file. Tap 🔽 to see further info.

🗩 **Comments**: Displays all comments made about a file or folder. You can add your own comment by typing them in and tapping **Post**.

📍 **Maps**: Displays the map location for files with geographic information properties.

Working with tasks

Tap **Tasks** to see the list of tasks assigned to you and to create new To do lists or Review & Approve tasks.

Tasks are in date order so that you'll always see the task with the most recent due date first. All of your tasks are synced with your Alfresco account.

Tap on a task and you'll see more details about the task. If the task relates to a file, you'll see a preview image and the file name. Tap on the file to open it and you can use all the file actions.

You can click **View** and select to show either **My Tasks** or **Tasks I Started**.

❖ The **Tasks** options are only available for Alfresco Server accounts, not Alfresco Cloud accounts.

Creating new tasks

Tap **+** to create a new task and choose one of the two task types: **To do** or **Review & Approve**.

❖ You can also create a new task when you're viewing an item. In this case only the **Review & Approve** option is available.

When you create a new task:

1. Enter a title for the task and choose the date that the task is due.

2. Tap **Assignee** to search for a person to assign the task to.

3. At this point you can tap **Save**.

   If you like, you can also add attachments needed for the task, for example, a file for review, and you can set a high, medium, or low priority. If you want to tell the person about the task and notify them of any change, leave the Email notification switched on.

   For **Review & Approve** tasks, use **–** and **+** to add and remove reviewers.

Task actions

Depending on whether you have a **Review** or **To do** task open, you can tap the action buttons to:

Approve: Approve the reviewed file.

Reject: Reject the reviewed file.

Reassign: Choose another person to assign the task to.

Done: Complete the task, and add a comment if required.

Favorite content

You can make any file or folder a favorite by tapping ☆ from your desktop or from Alfresco Mobile.

Tap **Favorites** to access all your favorite content. If you enable sync you can also see your favorites when you're offline.

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

When you're online, your favorite content will automatically sync to your device. This means that your favorite content is 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 content. If you edit a favorite file or folder while you're offline, the next time you go back online the changes you've made will be synced to Alfresco.

You can switch **Enable Sync** on and off in the account settings.

If you switch off **Enable Sync** at any point, then when you tap **Favorites** you won't see favorite content unless you're online.

Searching Alfresco

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

A search box is available when you've selected **Sites**, **Shared Files**, **My Files**, or **Repository**.

❖ You may need to refresh the list to display the search box.

1. Type your search text in the search box and tap **Search** on your device keypad.

    ❖ If you're in a specific site or folder, then only that site or folder is searched.

2. All files matching the search are displayed. Tap a result to preview the file.

    ❖ You can search for file names only, not for folder names.

    If you search across all sites and tap on a search result you'll see a file preview, with no additional options for working with the file. If you search within a site then all the usual options are available.

    The search results list is displayed until you click **Cancel**.

Local Files

Content that's stored on your device is listed in **Local Files**. Local files can be files downloaded from Alfresco to store locally or they can be sent to Alfresco Mobile. All local files can be accessed when you are offline. You can:

⤳ **Open in...**: Choose a compatible app on your device to open a file in. When you've edited the file some apps let you **Save Back** straight to Alfresco, with others you need to save to your device and then upload to Alfresco.

❖ If the file you're trying to open doesn't have a file extension, you'll see No Applications Available.

✉ **Email**: Open an new draft email with the file attached.

🖨 **Print**: Print the file to a compatible AirPrint printer.

✎ **Rename**: Rename the file.

✕ **Delete**: Delete the file or folder from the Alfresco site.

You can tap **Original Properties** to view the file properties at the point it was downloaded from Alfresco. Any changes to the properties aren't reflected here.