

Alfresco Mobile

User Guide App Version 1.4

Get Started with Alfresco Mobile

Once you've connected Alfresco Mobile to your instance of Alfresco or your Alfresco Cloud account (see the "Alfresco Mobile Setup Guide"), it's time to start finding, downloading, and using your Alfresco content.

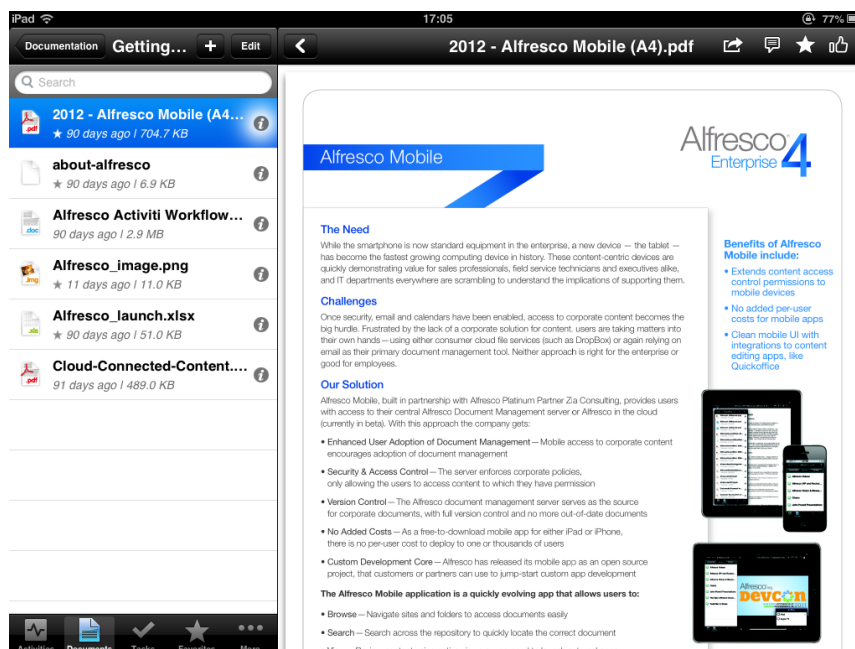
Here's a quick guide to Alfresco Mobile's key features (all features are the same on both iPad and iPhone unless otherwise noted).

Home screen

When you start up Alfresco Mobile, the first thing you'll see is a list of all Alfresco sites. This is the Documents section of Alfresco. Here you can navigate through sites, folders, and documents by tapping on them.

Main navigation

The main navigation buttons are at the bottom of the screen.



Tap the navigation buttons to:

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

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


Tasks: View a list of your tasks in your Alfresco account.

Favorites: When **Enable Sync** is **ON**, view the synced documents in your Alfresco accounts, even when you're not online.

More: Search for documents, work with your download folder, view and manage your accounts, change settings, and view the Help guides.


Navigating documents

Tap **Documents** 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.

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. You can always go back using the button in the top left corner. When viewing a document, you can expand the document view by tapping .

To update the contents of sites at any time, pull down the document list and release to refresh.

Actions

When you're in a site or folder in which you have permissions to upload or edit content (permissions are set in Alfresco), tap  to:

Create Text File: Create a new text file, and add tags. Save your file back to Alfresco.

Create Folder: Name and create folders for new content.

Upload: Choose the files to upload to Alfresco. You can add a name and Alfresco tags to the upload (either create new tags or select from existing Alfresco tags).

Tap **Choose Photos or Videos** to choose photos or videos from your Photo Library, or tap **Choose Documents** to choose documents from your Downloads folder. Tap as many items as you need, then tap **Upload**.

Take Photo or Video: Take a new photo or capture video.

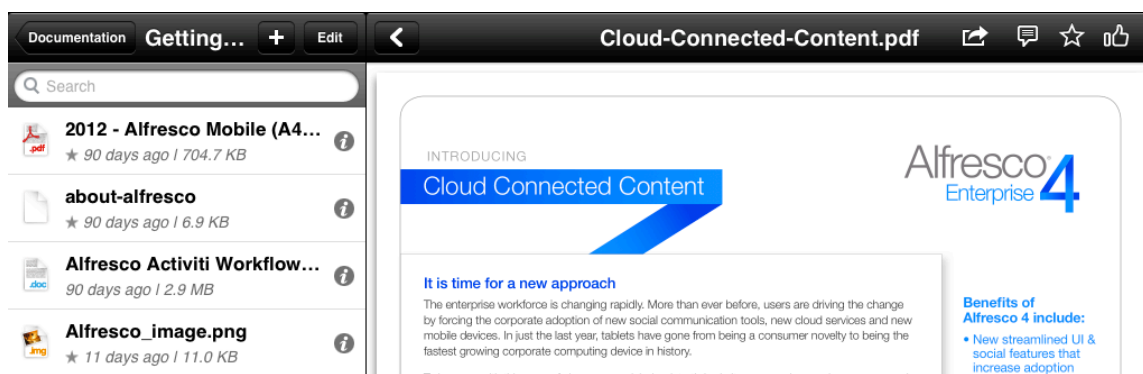
Record Audio: Record and upload audio.

When you're in a site or folder in which you have permissions to edit content, tap **Edit** in the top right corner of the screen to delete selected folders or files or to download files.


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 tap  to see these actions:

Open in...: Tap  and choose a compatible application on your device to open a copy of the document. If the document you're trying to open doesn't have a file extension, you'll see No Applications Available.

Email as Attachment: Tap  to create an email. The file is automatically attached to the email.

Email as Link: For Alfresco Cloud accounts, tap  to email a link to the document.


Download: Tap  to download a copy of the file for offline viewing. The file is now available when you tap **More** and then **Downloads**.


Send for review: Tap  to create a Review & Approve task for others to approve the document.


Print: Tap  to print to a compatible AirPrint printer.

You'll also see actions to:

Comment: Tap  to view existing comments, and tap  to add a new comment.

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 Enable Sync feature is **ON**.

Like: Tap  to express that you like or support a document.

Edit: Tap  to change the content of a text file.



Refresh the documents list by pulling down the list of documents.


Working with tasks

Tap **Tasks** to see the list of tasks assigned to you and to create new Todo 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 up with your Alfresco account.


Tap on a task and you'll see more details about the task. If the task relates to a document, you'll see a preview thumbnail image and the document's name. Tap **More** to see information about the task.

Tap  if you want to show the task details in full screen, and then tap  to return to the task list.

You can switch the list of tasks to show your tasks (My tasks) and the tasks that you started (Tasks I've started). Tap  to change the list.

Tap on the document to open it and you can use all the document actions.

Creating new tasks

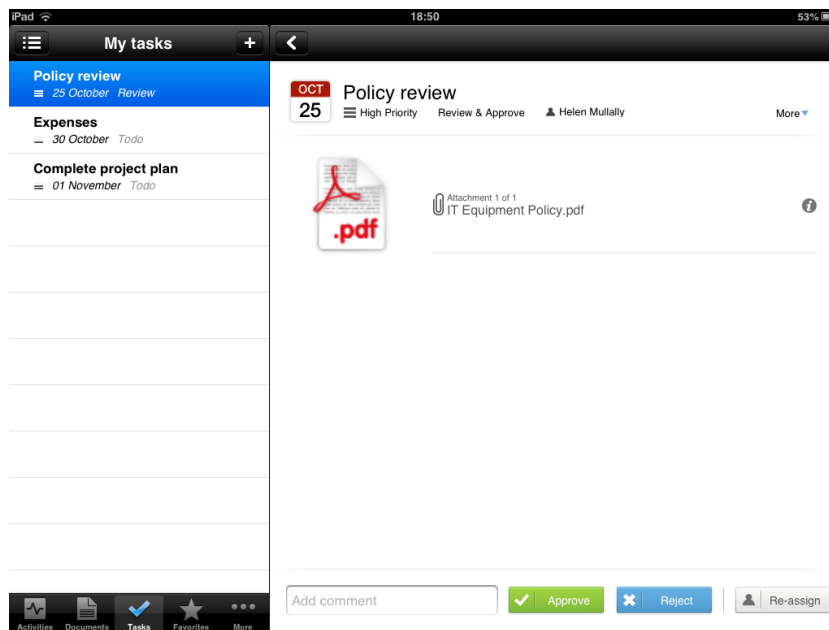
Tap  to create a new task. If you have multiple accounts set up in Alfresco Mobile, first select the account you want to use. Next, choose one of the two task types: **Todo** or **Review & Approve**.

When you create a new task:

1. Enter a name for the task and choose the date that the task is due.
2. Tap **Assignee** to search for a person to assign to the task.
3. At this point you can tap **Save**.

If you like, you can also add attachments needed for the task, for example, a document 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, set Email notification to **ON**.

For **Review & Approve** tasks, tap **Approvers** to choose one or more people to approve the document.



Task actions

When you have a **Review** task open, tap the action buttons to:

Approve: Used to indicate that the reviewed document is approved.

Reject: Used to indicate that the reviewed document is not approved.

Re-assign: Choose another person to assign to the task.

When you have a **Todo** task open, tap the action buttons to:

Done: Complete the task.

Re-assign: Choose another person to assign to the task.

You can add a comment to your action, if you wish.

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**, 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 (this sets Enable Sync to **ON** in the Settings).

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 set Enable Sync to **OFF** at any point, when you tap **Favorites**, you see the favorite documents only when you're connected.

Searching for content

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

Tap **More** and then 🔍 **Search**. You'll see the account that will be used for the search. Tap the account name in **Search in:** to change the account in which you want to search.

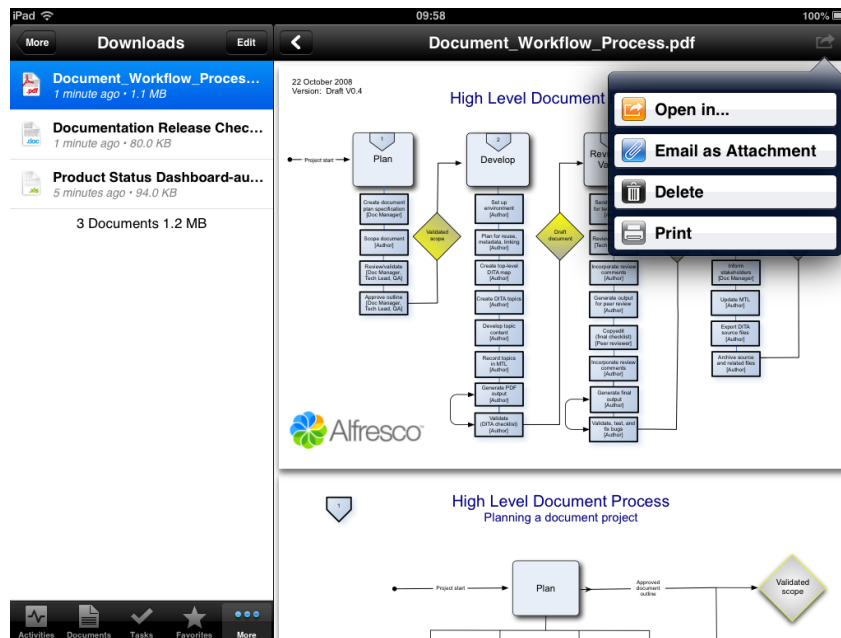
Type your search text in the search box and tap **Search**. Tap a document name in the Search Results list to view it.

When browsing in a folder, type your text in the Search box and tap **Search**, then tap a document name in the Search Results list to view it.

Working with downloads


The documents that are stored on your device are listed in the **Downloads** folder. Downloads can be files downloaded from Alfresco to store locally or they can be sent to Alfresco Mobile from another app for offline access.

Tap **More**, and then tap  **Downloads**.





When you open a document, you can:

Open in...: Tap  to open a copy of the document in a compatible app.

Email as Attachment: Tap  to create an email. The file is automatically attached to the email.

Delete: Tap  to delete the file from the Downloads folder on your device.

If you want to delete documents quickly, tap **Edit** in the top right corner of the downloads list, tap  next to the document you want to delete, and then tap **Delete**. Tap **Done** when you've finished.


Print: Tap  to select a printer, page ranges, and number of copies for printing the document.

Editing documents in third-party apps

Edit documents on your mobile device in other apps, such as Quickoffice Pro HD, Office² HD, or Apple iWork apps.

Tap  from the **Documents** or **Downloads** folder and then tap  to select a compatible app.

Select the app in which to edit your document. Send it back to Alfresco using **Open In... Alfresco** if that function is supported, or use email and open it in Alfresco from there.

Quickoffice Pro HD (iPad only): Open your document in Alfresco, tap , and then tap **Quickoffice Pro HD**. Edit your document in Quickoffice and choose **Save Back**. Then select **Alfresco** to automatically replace the original document with this new version in your Alfresco document library.

