

Automating the Alfresco Taxonomy

Jason Jolley

The Basics

A 'Taxonomy' is a Classification Scheme.

Think 'Blueprint' for your data.



Folder Structure

The diagram features four teal rectangular boxes with white text, arranged in a 2x2 grid. These boxes are superimposed on a background of large, light-colored hexagons in shades of blue, yellow, and green. The hexagons are arranged in a honeycomb pattern, with some partially visible at the edges of the frame.

Metadata

Tags

Categories

Why Automate?



Consistent Data and Structure is **important!**

Users **hate** creating structure and data

Users **love** structure and data for retrieval!

Site: **Cases**

- > Folder: **<Case Status>**
- > Folder: **<Case>**
 - > Folder: **<Document Type>**
 - > Folder: **<Document Sub Type>**

DataList Backed Content Fields

Why?



Empower Your User Community!



Keeps Data Consistent & Valid

Alfresco » Document Details

← → ↺ ⓘ

/share/page/site/matters/document-details?nodeRef=workspace://SpacesStore/9f360418-1b23-49ee-9e41-03b63e78d6fc

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PDF

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HomeMy FilesShared FilesSites ▾Tasks ▾PeopleRepositoryAdmin ToolsDebug Menu ▾Administrator ▾

Search files, people, sites

MattersPublic

Site DashboardDocument LibrarySite Members

Documents > Open > 00000001 > Accounting > Budgets

Beecon Travel Budget.xlsx1.0

Modified by Administrator on Tue 25 Apr 2017 09:08:03

★ Favorite

👍 Like 0

💬 Comment

↗ Share

Download

📄

⏮ Previous⏭ Next1 / 1

⏴ ⏵ 125%

Maximize

Download

🔗

🔍

Plane Ticket	1,000.00 €
Conference Fee	85.00 €
Train	100.00 €
Value	Priceless

Comments

▼ Document Actions

📄 View In Browser

📄 Edit in Google Docs™

✎ Edit in Microsoft Office™

✎ Edit Offline

📄 Upload New Version

📄 Edit Properties

📄 Move to...

📄 Copy to...

🗑 Delete Document

🔄 Sync to Cloud

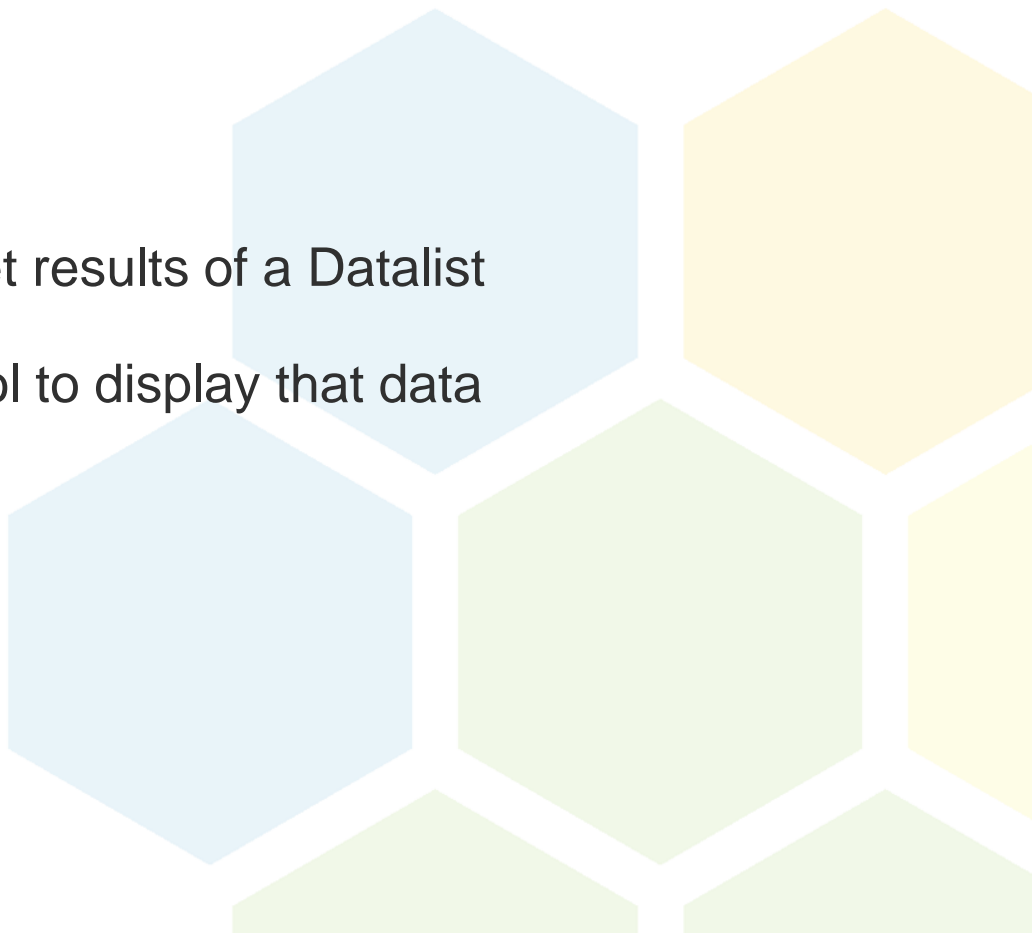
👤 Start Workflow

🔑 Manage Permissions

🔑 Become Owner

How to do this?

1. Create a Datalist
2. Create a Webscript that can get results of a Datalist
3. Create a Share renderer control to display that data



Metadata Inheritance

Why?



Metadata

Two types of Metadata Inheritance

- On Creation
- On Folder Update



Alfresco » Document Lib

← → ↺

/share/page/site/matters/documentlibrary#filter=path%7C%2FOpen%2F00000001%2FAccounting%2FBudgets%7C&page=1

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▼ Documents

All Documents

I'm Editing

Others are Editing

Recently Modified

Recently Added

My Favorites

Synced Content

Synced with Errors

▼ Library

Documents

Close

Final

Links

Needs Attention

Open

00000001

Accounting

Billing Profile

Budgets

Invoices and Bills


Backfile

Correspondence


Select ▾+ Create... ▾UploadSync to CloudSelected Items... ▾

Documents > Open > 00000001 > Accounting > Budgets

Drag and drop to upload files!




Drag files from your desktop and drop them here to upload.




You can drop files onto folders.

You can also...



Upload files



Create a folder

0 - 0 of 0 << >>

Q: How was this done? A: Alfresco Rules!

Simple

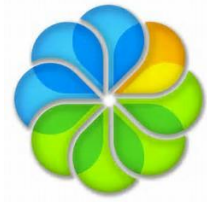


Rules



JS

Complex



Rules



Alfresco » Document Lib

ccms-mig-server.cloudapp.net/share/page/site/matters/documentlibrary#filter=path%7C%2FOpen%2F00000001&page=1

HomeMy FilesShared FilesSitesTasksPeopleRepositoryAdmin ToolsDebug MenuAdministrator

Search files, people, sites

MattersPublic

Site DashboardDocument LibrarySite Members

Documents








- All Documents
- I'm Editing
- Others are Editing
- Recently Modified
- Recently Added
- My Favorites
- Synced Content
- Synced with Errors

Library

- Documents
 - Close
 - Final
 - Links
 - Needs Attention
 - Open
 - 00000001
 - Accounting
 - Billing Profile
 - Budgets
 - Invoices and Bills
 - Backfile
 - Correspondence

SelectCreate...UploadSync to CloudSelected Items...

Documents > Open > 00000001

<input type="checkbox"/>		Accounting	Modified 3 months ago by Administrator
<input type="checkbox"/>		Backfile	Created 3 months ago by Administrator
<input type="checkbox"/>		Correspondence	Modified 3 months ago by Administrator
<input type="checkbox"/>		Document Production	Modified 3 months ago by Administrator
<input type="checkbox"/>		Litigation	Modified 3 months ago by Administrator
<input type="checkbox"/>		Matter Info	Created 3 months ago by Administrator
<input type="checkbox"/>		Transactional	Modified 3 months ago by Administrator

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Q: How was this done? A: Alfresco Rules!

A Little More Complex



Rules +



WARNING

Modified / Created Info:

- Disable Behaviour for updating system info.

Checked Out Documents!

- Cancel & Re-Checkout

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Site Creation

Q: How do you do it?

Use Browser Tools to interrogate Share (Warning: There are minor differences between Alfresco versión)

1. Go to User Dashboard
2. Login (if necessary)
3. Create Site
4. Go to Site Dashboard (to initialize Site)

A: Emulate Share via REST



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A: Emulate Share via REST

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Example:

```
{  
  // Site Creation Properties  
  "sitePreset": "site-dashboard",  
  "title": "Test Site",  
  "shortName": "test-site",  
  "description": "",  
  "visibility": "PUBLIC"  
}
```



Common reason to create sites by API?

- External Processes (Think Authoritative Data Sources)
- Workflow (Use Activiti and REST Call Task)
- Document Intake / Taxonomy Creation using Rules



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