Alfresco Enterprise

Enterprise 4.0

Getting Started with Alfresco Share Collaboration

Contents

Getting Started with Alfresco Share Collaboration

In today's workplace, individuals spend most of their time working on teams. To collaborate effectively, they need tools to facilitate communication, share information, and run projects. Alfresco Share provides these tools.

The *Getting Started with Alfresco Share Collaboration* tutorial introduces the basic concepts to accompany the download of Alfresco Share. It takes you through a scenario to demonstrate the flexibility Alfresco Share provides for working in a collaborative team environment.

Alfresco recommends you walk through this guided tutorial to familiarize yourself with the features.

Scenario

For this tutorial, you will be walking through the following scenario.

You will:

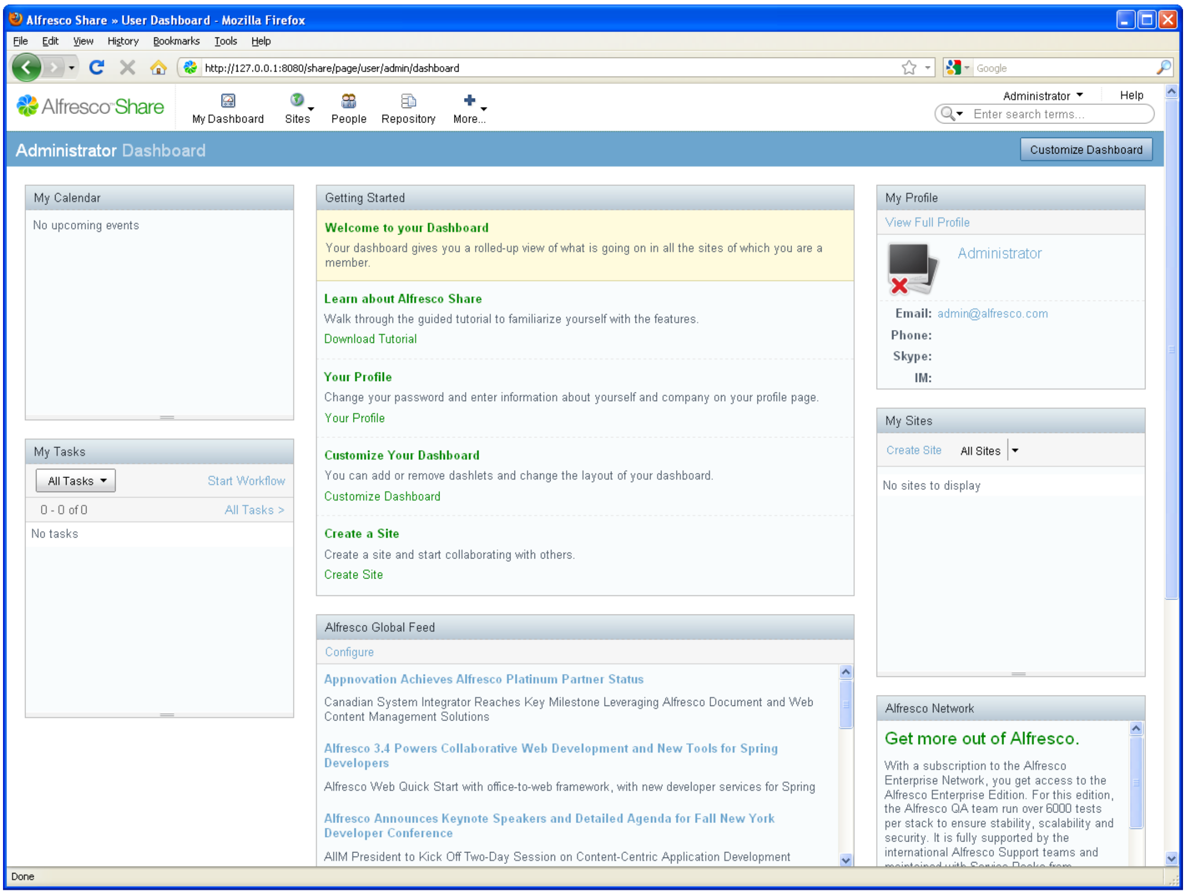
- Set up your personal dashboard and add your credentials
- Create a collaboration site for your team
- Prepare the site for collaboration with other users
- Invite users to the site
- View the site activities

Log in

Log in to Alfresco Share using the default credentials.

1. Type the following on the login page:
   a. **Username**: `admin`
   b. **Password**: `admin`
2. Click **Login**.

   On entering the application, your personal dashboard displays.



You track all information relevant to you on your personal dashboard.

About dashlets

My Dashboard is where you track all information relevant to you.

Your dashboard consists of personal dashlets. A dashlet is a summary component that may or may not have an equivalent page component. If there is a complementary page component, the related dashlet displays the information generated from it. Dashlets only appear on the personal or site dashboards. The following personal dashlets are available.

Getting Started
: The **Getting Started** dashlet gives you options to get started when you access Share for the first time. Once you are familiar with Share, you can remove it. This dashlet displays by default.

My Calendar
: Your **My Calendar** dashlet contains a rolled-up view of events that you have created, as well as events for each site of which you are a member, providing quick access to each of them. This dashlet displays by default.

RSS Feed
: By default, the **RSS Feed** dashlet displays the Alfresco website feed. You can configure it to personalize your feeds. You can also add and configure as many instances of this dashlet as you want. This dashlet displays by default.

Alfresco Network
: The **Alfresco Network** dashlet is the portal for Alfresco customers to get all the latest news and views. It provides a feed to the latest activities on the Network. This dashlet displays by default.

My Sites' Activities
Your **My Site Activities** dashlet tracks the most recent activities that have been performed in any site of which you are a member. Use the filters provided to view activities for a specific period of time and activities based on ownership (current user, other users, or all). This dashlet displays by default.

My Limited Profile
Your **My Profile** dashlet contains summary personal details about you, based on your detailed profile. This dashlet displays by default.

My Sites
Your **My Sites** dashlet lists all sites that you have created or of which you are a member, providing quick access to each of them. On this dashlet you can mark a site as a favorite, enter a site, create a new site. Use the filter provided to view your sites by type. This dashlet displays by default.

My Tasks
Your **My Tasks** dashlet displays the incomplete tasks assigned to you and invitations to join sites. This dashlet provides links to edit and view individual tasks. You can also start a workflow or navigate to the My Tasks page. Use the filter provided to view specific tasks. This dashlet displays by default.

Content I'm Editing
Your **Content I'm Editing** dashlet displays the last three Document Library content items, Blog posts, Wiki pages, and Discussion forum posts that you edited.

CMIS Feed
The **Introducing CMIS** dashlet displays links specific to the Content Management Interoperability Services (CMIS) specification and implementation.

Web View
The **Web View** dashlet can be configured to display any website. The **Configure** link enables you to change the website as desired.

My Workspaces
The **My Document Workspaces** dashlet displays all Document Workspace sites of which you are a member, providing quick access to each of them.

My Meeting Workspaces
The **My Meeting Workspaces** dashlet displays all Meeting Workspace sites of which you are a member, providing quick access to each of them.

My Documents
The **My Documents** dashlet enables you to view files from all Document Libraries that may be of particular interest to you, organized into three categories: Favorites, I'm Editing, and I've Modified.

You can click **My Dashboard** on the application toolbar from anywhere in Share to return to your personal dashboard.

Set up your personal dashboard

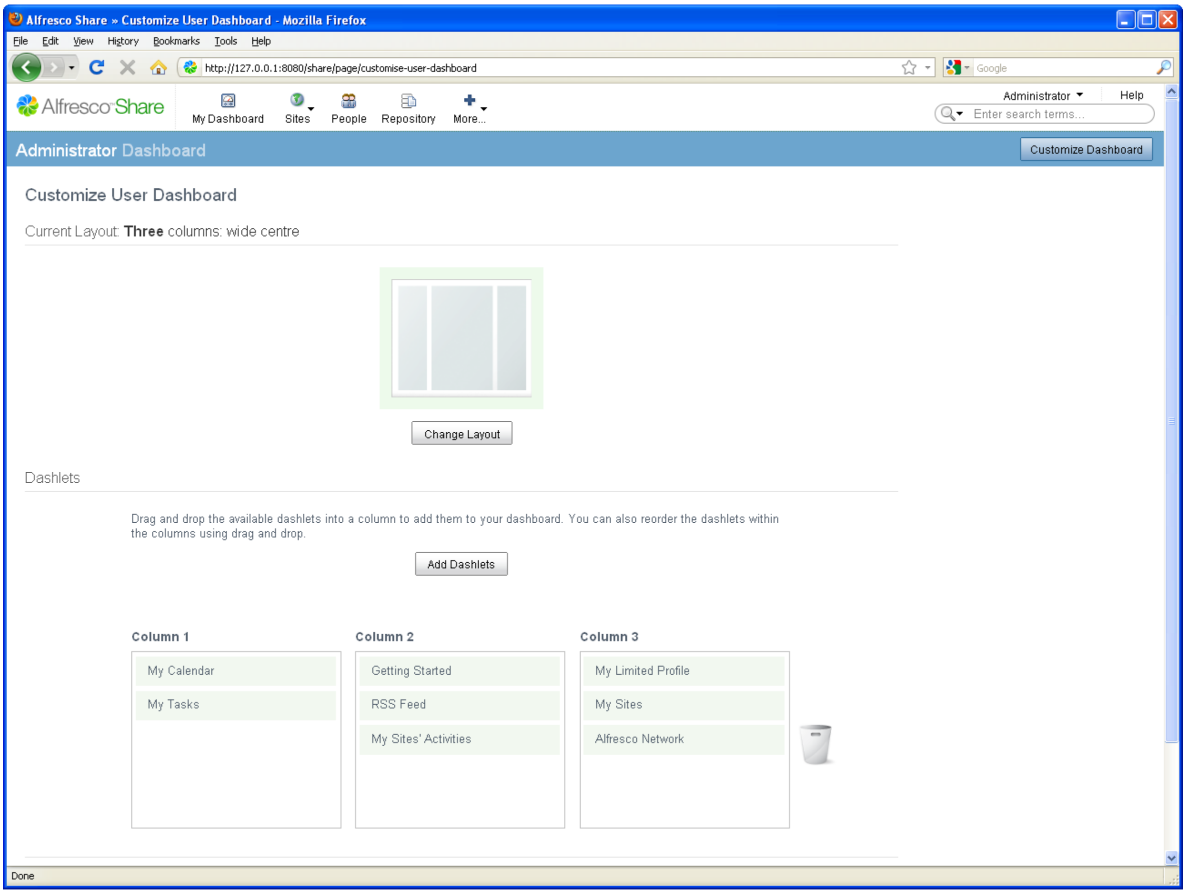
You can set up your personal dashboard to tailor the view you have, depending on your requirements.

You can:

- Modify the dashboard appearance – view as one, two, three, or four columns
- Add and remove personal dashlets

To modify the dashboard appearance and content:

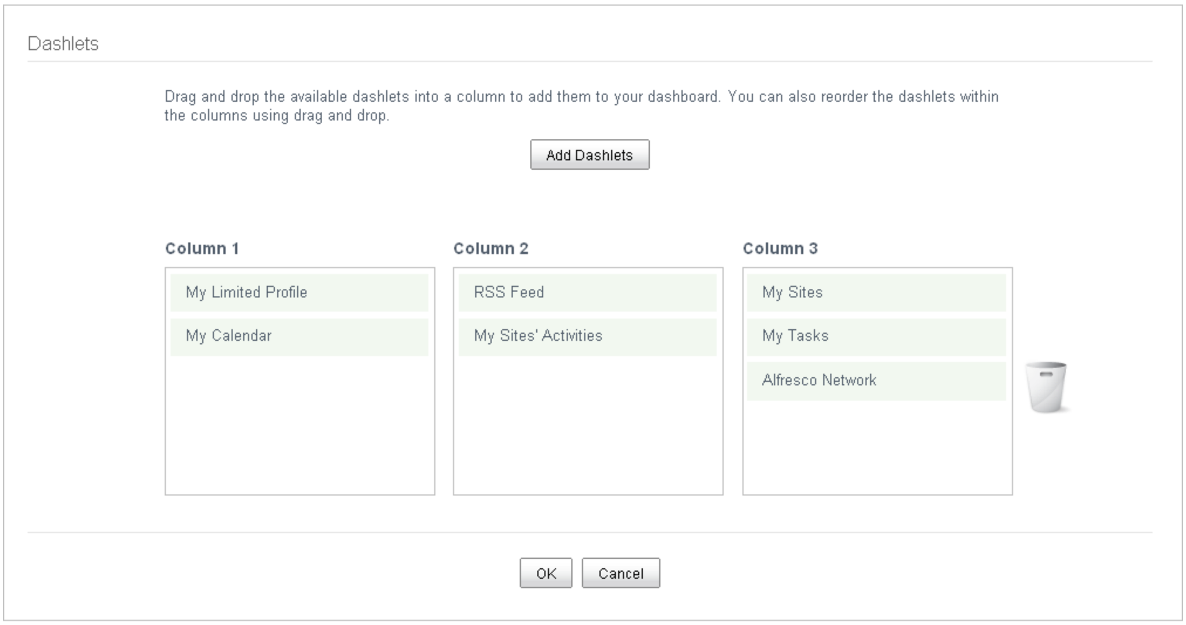
1. Click **Customize Dashboard** on the banner.



The **Customize User Dashboard** page displays.

2. Click **Change Layout** to display the available layouts.
3. Click the graphic or **Select** for the desired layout. For this scenario, there is no need to modify anything.
4. Click **Cancel**.
5. Click **Add Dashlets**.

   All available dashlets display.
6. Click and drag **Getting Started** to the trash can to remove it.
7. Use standard drag and drop functionality to move:
   a. **My Limited Profile** to the top of the left column
   b. **My Tasks** to the middle of the right column



8. Click **OK**.

The configuration is saved and you return to your updated personal dashboard.

Publish your credentials

As part of the site, you want to publish your credentials for all site members to view.

You publish your credentials via your My Profile page component. It enables you to:

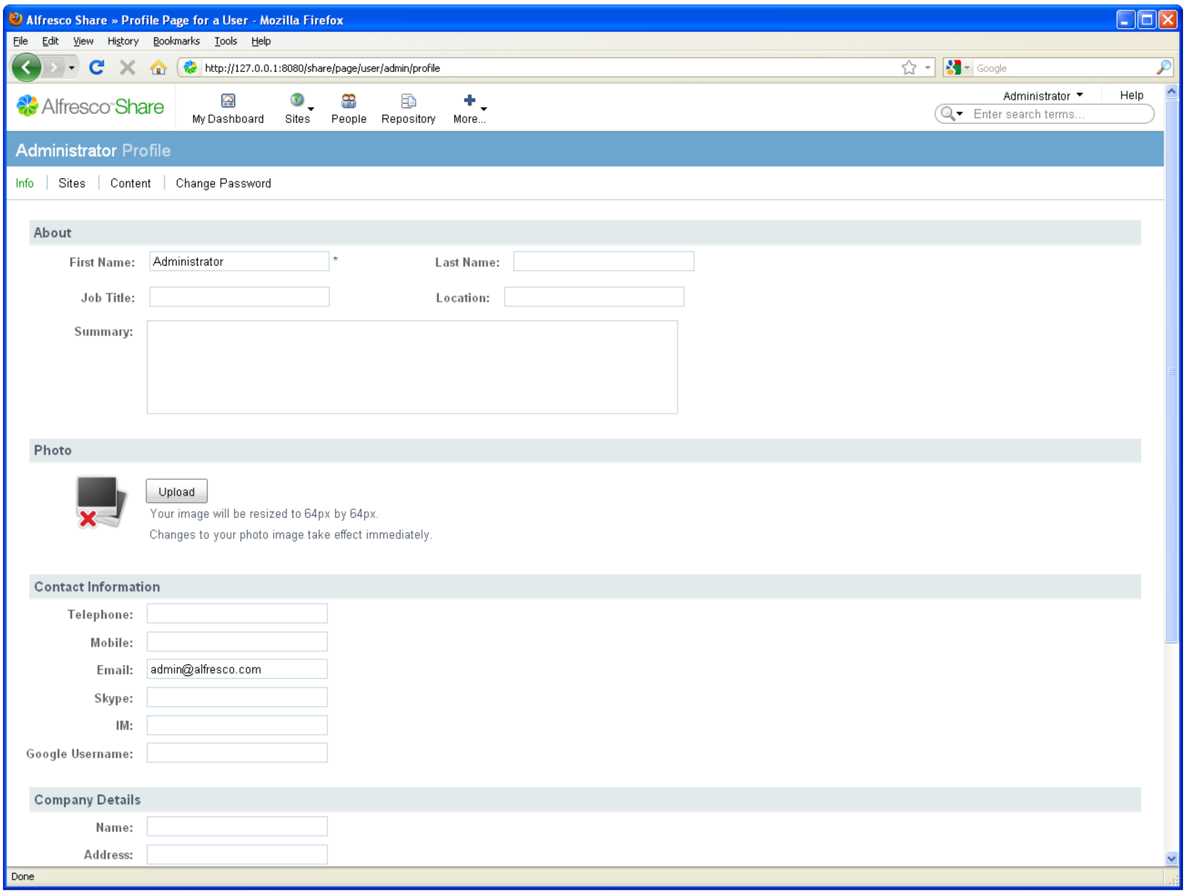
- Edit your profile
- Change your password

On the application toolbar, the name of the currently logged in user appears as a menu above the search field. As you are logged in as the default administrative user, the menu displays the name **Administrator**. This menu provides convenient access to your user profile and other commonly used features.

To publish your credentials:

1. Expand the user menu on the toolbar and click **My Profile**.

   Your profile displays.
2. Click **Edit Profile** and complete the information as desired.



3. Click **Save Changes**.

Your profile displays with the updated information.

Create your collaboration site

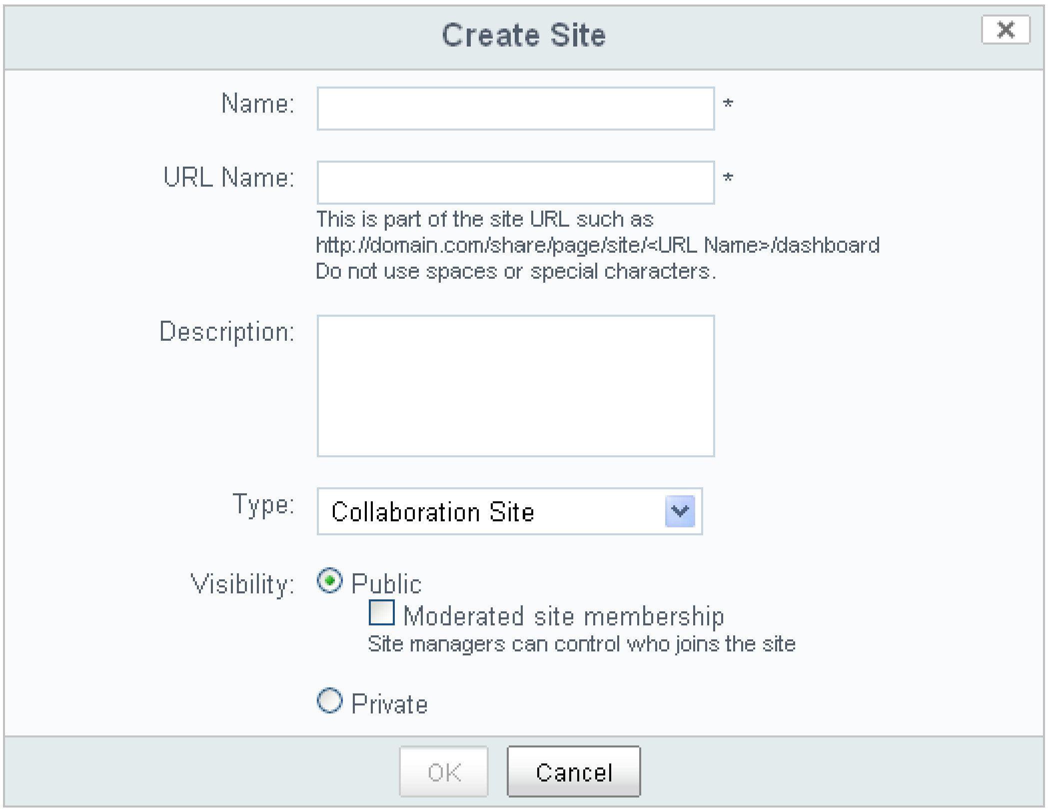
The next step in the scenario is to create a collaboration site for your team.

From here, your team will be able to:

- Share and manage content
- Schedule and manage meeting events
- Have group discussions
- Write blogs
- Author content online and share with others via a wiki

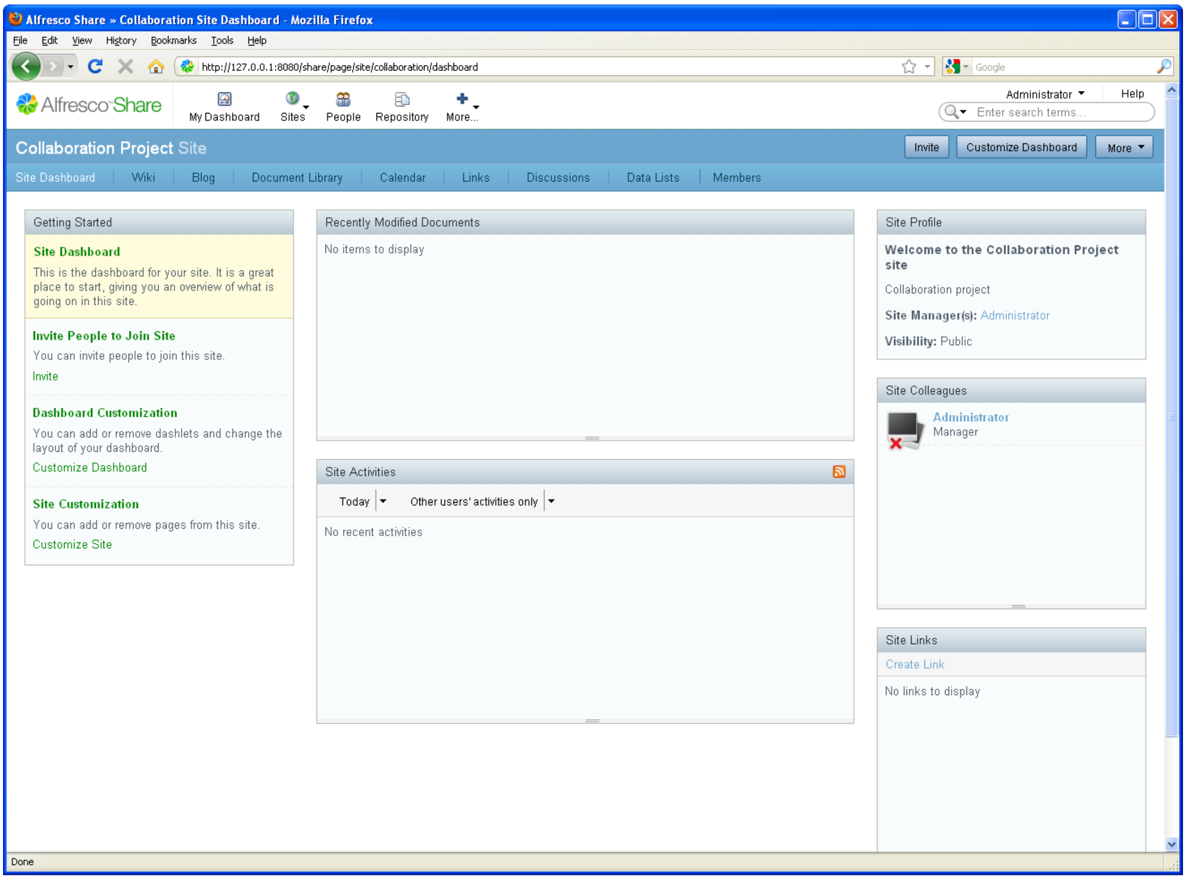
To create your site:

1. On the application toolbar, click **My Dashboard** to return to your personal dashboard.
2. Click **Create Site** on the My Sites personal dashlet.



3. Add the following information:
   a. **Name:** A descriptive name that will display as the title of your site. This is mandatory.
   b. **URL name:** A brief version of the name that is appropriate for a URL; it cannot contain any spaces or special characters. This is mandatory.
   c. **Description:** Information to distinguish your site from others in the My Sites list.
   d. **Type:** For this release, the only available site type is **Collaboration**.
   e. **Visibility:** A value that dictates users' access to the site.

   Your site has public access by default, meaning it is available to be viewed by all users, whether or not they join the site. In a private site, the Site Manager invites users to join. In a moderated public site, the Site Manager controls the membership by accepting or rejecting membership requests.
4. Click **OK** to create and view your new site.



Set up your site

The site dashboard displays all information and activities associated with the site. It is customized by the site owner.

You can set up your new site to meet your team’s requirements. You can:

- Customize the site dashboard using site dashlets
- Customize the site by adding or removing page components on the site

The following site dashlets are available.

Getting Started
The **Getting Started** dashlet gives you options to get started when you access Share for the first time. Once you are familiar with Share, you can remove it. This dashlet displays by default.

Recently Modified Documents
Your **Recently Modified Documents** dashlet lists all documents that have been created or modified in the last 7 days, providing quick access to each of them. This dashlet displays by default.

Site Activities
Your **Site Activities** dashlet tracks the most recent activities that have been performed in the current site. This dashlet displays by default.

Site Profile
Your **Site Profile** dashlet displays summary details about the current site. This dashlet displays by default.

Site Colleagues
The **Site Colleagues** dashlet displays the members of this site (to a maximum of 100 users) and their assigned role. This dashlet displays by default.

Site Calendar
Your **Site Calendar** dashlet contains a rolled-up view of events for this site.

Site Wiki
Your **Wiki** dashlet displays content from the Wiki page component. You can configure this dashlet to display the desired Wiki page.

RSS Feed
By default, the **RSS Feed** dashlet displays the Alfresco website feed. You can configure it to personalize your feeds. You can also add and configure as many instances of this dashlet as you want.

Web View
The **Web View** dashlet can be configured to display any website. The **Configure** link enables you to change the website as desired.

Site Links
The **Site Links** dashlet displays the web links compiled by site users that are relevant to the current site. This dashlet displays by default.

Image Preview
The **Image Preview** dashlet displays a thumbnail of each image contained in the site's Document Library.

Site Data Lists
The **Site Data Lists** dashlet displays a list of the existing data lists for the current site.

Web Quick Start
The **Web Quick Start** dashlet initially displays a link that imports the Web Quick Start demo data. Once the import is complete, this dashlet displays a link to the Web Quick Start online help.

Customize the site dashboard

You can add and reorder the site dashlets on the site dashboard the same as you do with personal dashlets on your personal dashboard.

1. Ensure you are in your new site and click **Customize Dashboard** on the banner.

   The **Customize Site Dashboard** page where you add and remove site dashlets appears.
2. Click **Add Dashlets** and add **Site Wiki** to your site dashboard.
3. Click **OK**.

The configuration is saved and you return to the updated site dashboard.

Customize the site content

Alfresco Share has the concept of page components which you can add to your site as customized functionality. A page component has rich functionality and is URL addressable.

1. Ensure you are within your new site and click **Customize Site** in the **More** menu on the banner.

   On the **Customize Site** page, you can add and remove page components. The available page components are:

   Wiki
   The Wiki enables you to create web pages for a collaborative website. Anyone who accesses it can contribute or modify content using a simplified markup language.

Blog
The Blog page component enables you to add commentary, descriptions of events, and other material related to your site, such as graphics or video.

Document Library
The Document Library page component enables you to store and collaboratively manage any content related to a site, such as documents, media files, or graphics.

Calendar
The Calendar page component enables you to schedule and track events for all sites you own or of which you are a member.

Links
The Links page component enables you to maintain a list of web links related to the site.

Discussions
The Discussions page component is used to post user-generated content related to a site. These often take the form of questions or comments with threaded discussions.

Data Lists
The Data Lists page component allows you to create and manage lists relevant to the site.

All the page components are displayed by default. For this scenario, there is no need to modify anything.

2. Click **Cancel**.

You return to the site dashboard.

Prepare your site for collaboration

To make the new site as collaborative as possible, you should prepare it before inviting users.

In this step, you will:

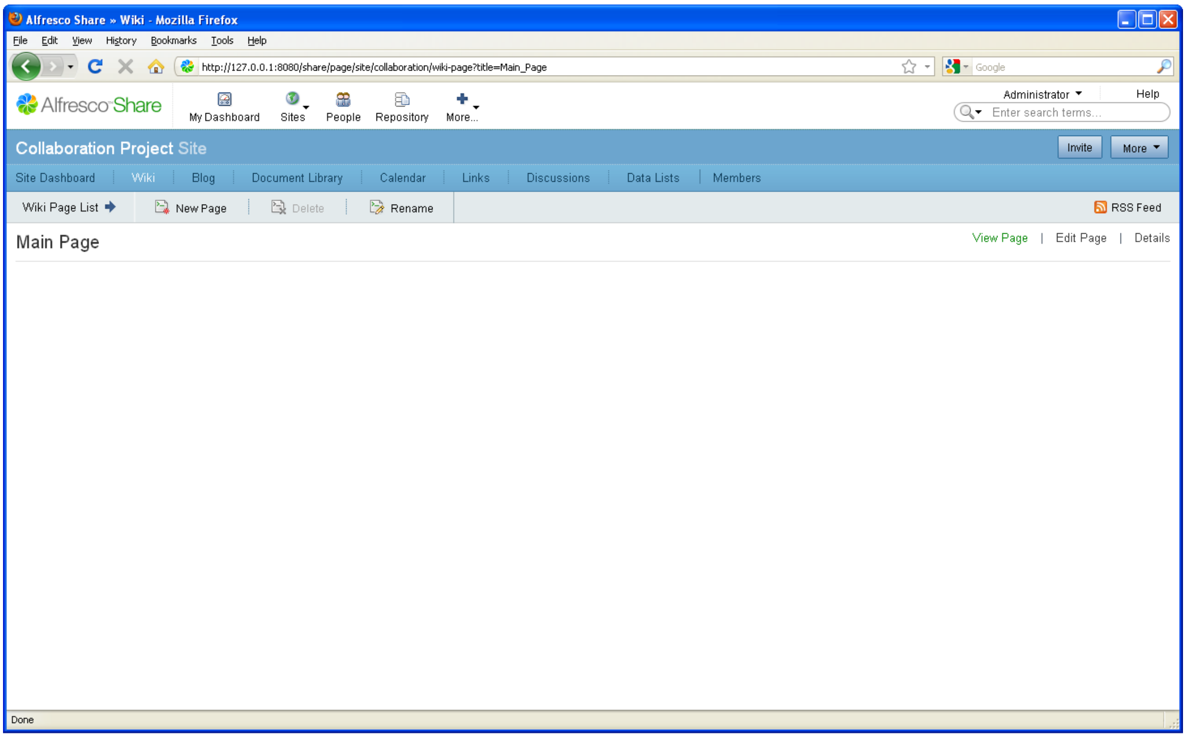
- Create an introduction and explanation for the site (Wiki)
- Add a set of marketing material documents (Document Library)
- Schedule a webinar introducing everyone to the site (Calendar)

Create an introduction

You use the Wiki page component within your site to write your introduction. Once it is written, you add it to the Wiki dashlet on your site dashboard.

1. Within your site, click **Wiki** on the banner to open the Wiki page component.

   The Wiki page component opens.



2. Click **New Page** and type `Welcome to our collaboration site` as the title.
3. Add the following content: `The purpose of this collaboration site is to share information for the project and ensure that communication is as easy as possible.`
4. Add the tag `collaboration`.
5. Click **Save**.

The new page displays.

Add the introduction to the site dashboard

Once you create a wiki page, you can set it to be the main wiki page. The content for this page appears in the Wiki dashlet on the site dashboard.

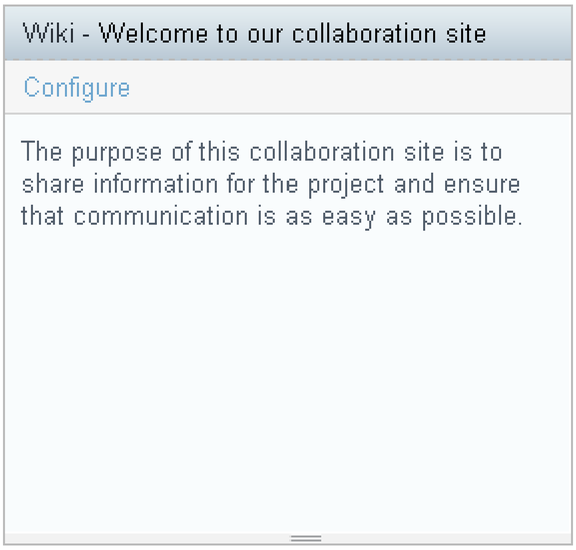
1. Within your site, click **Site Dashboard** on the banner.

   This returns you to the site dashboard for the current site.
2. Click **Configure** on the Wiki dashlet.

   The **Select Wiki Page** page displays.

3. Click **OK** to accept the page you have just created.

   The Wiki dashlet displays the text from the selected wiki page.



Add marketing material

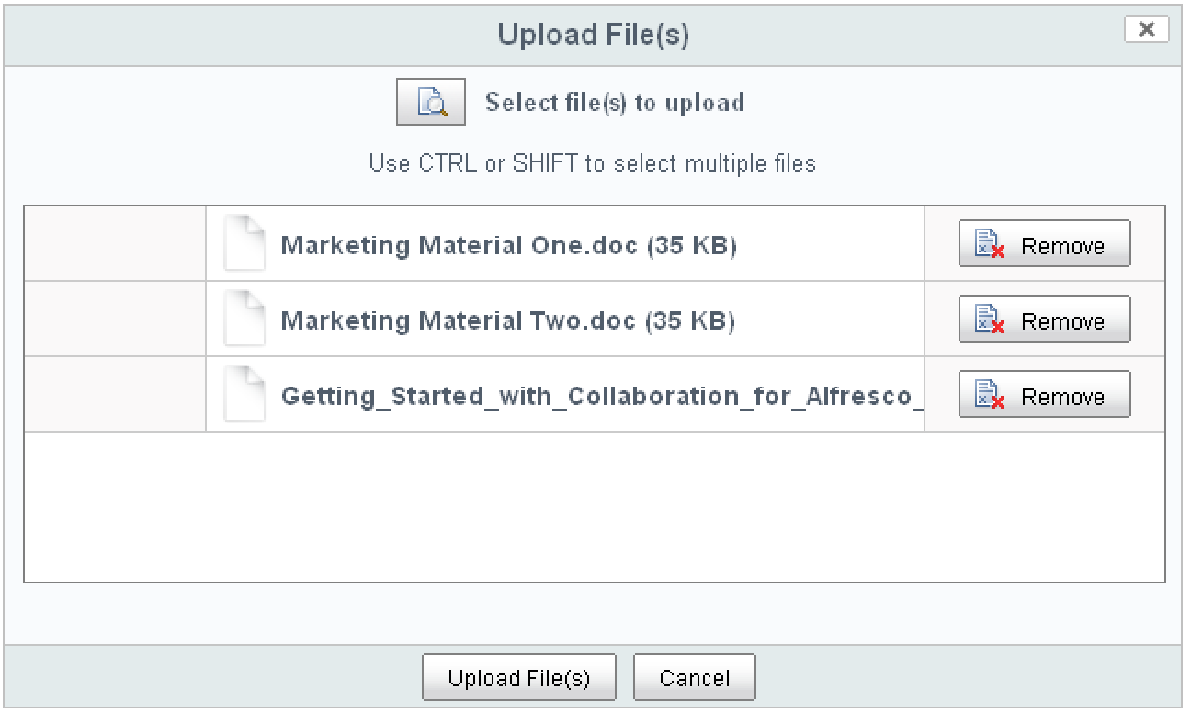
You have been preparing for this site for a month now and have three pieces of marketing content that you would like to upload. For this step of the scenario, choose three pieces of content on your personal computer to add to the library.

1. Within your site, click **Document Library** on the banner.

   The Document Library page component opens.
2. Click **Upload** to load your three content items.

   The **Upload File(s)** page opens.
3. Click the browse button to locate any three pieces of content on your computer to upload.

   The **Upload File(s)** page displays the three content items as a list.



4. Click **Upload File(s)**.

   The content items display their upload status.

5. Click **OK** when all content is 100% complete.

The page closes and the Document Library displays the selected content items.

Update a document

After uploading the marketing material, you realize that one document contains an error.

1. In the Document Library item list, position your cursor over one of the content items you have uploaded.

   This highlights the item and displays the actions available for that item.

2. Click **More** and then select the **Edit Offline** action.

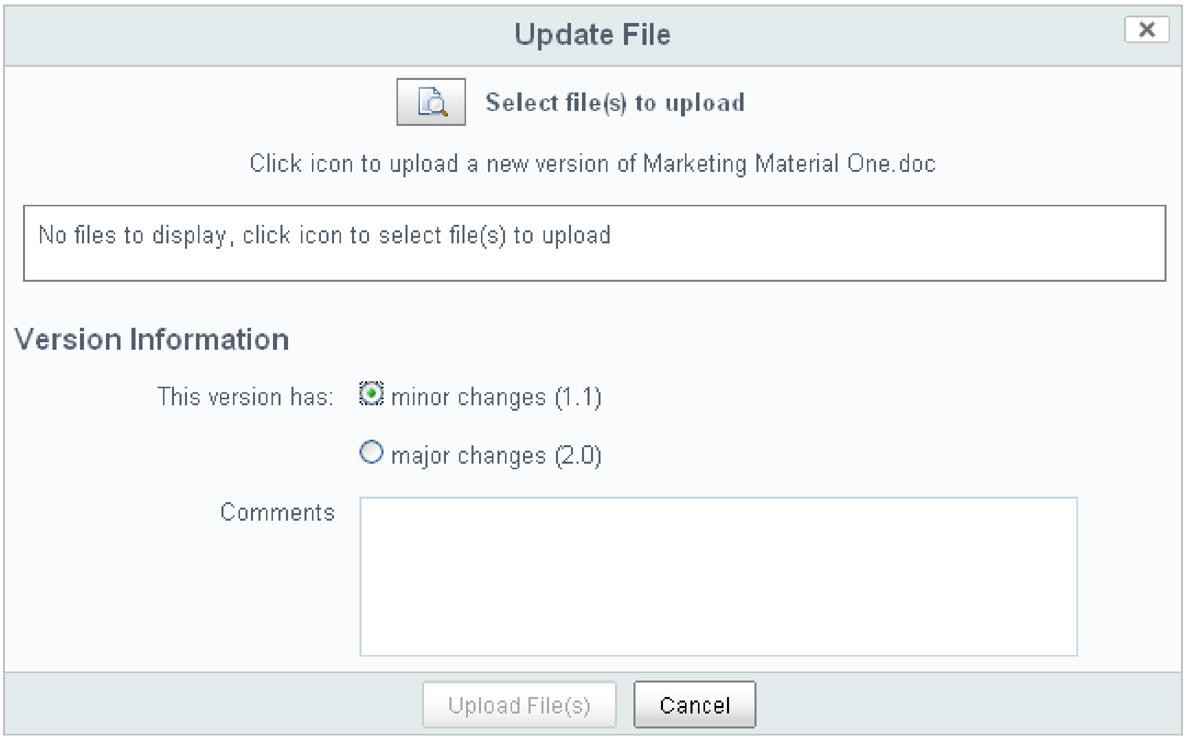
   The content moves to the **I'm Editing** view, indicating that the document is checked out to you.

3. Choose to save the file and click **OK** to save the content item in a location from which you can edit it.

   The content name will be appended with **(Working Copy)** in the location in which you save it.

4. Navigate to this content item on your personal computer, change a word, and save it.
5. In the browsing pane of the Document Library, ensure **I'm Editing** is the selected view under **Documents**.
6. In the item list, locate the document you modified and click the **Upload New Version** action.

   The **Update File** page displays.



7. Click the browse icon to locate and select your modified file.

Remember that it is appended with **(Working Copy)**.

Once selected, it displays in the **Update File** page.

8. Specify whether it is a minor or major version, type any comments you have, and click **Upload File(s)**.
9. Click **OK** when the upload reaches 100%.

You can locate the updated content item in its original location, the **Documents** folder, in the library. The version number has been updated accordingly.

Schedule a webinar

As part of promoting this collaboration site, you want to schedule a webinar to welcome the new users and discuss the purpose of the site.

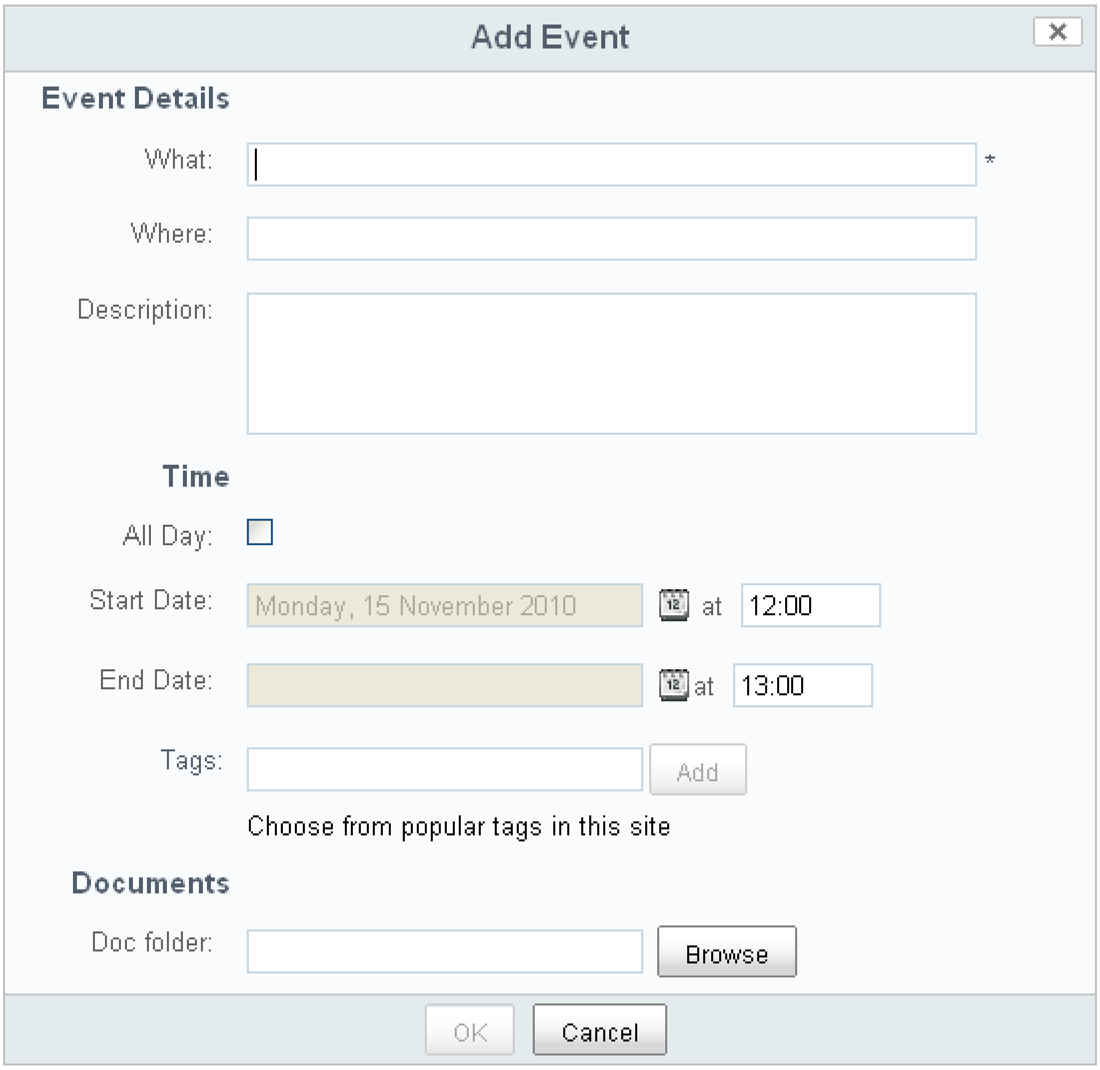
To schedule a webinar:

1. Within your site, click **Calendar** on the banner.

   The Calendar page component opens.

2. Select the date you want to have the webinar and click the **Add Event** icon (+) within that date.

   The **Add Event** page displays.



3. Enter the webinar details and click **OK**.

   If desired, use the **Browse** button to select a folder to indicate to users where material related to the event is located.

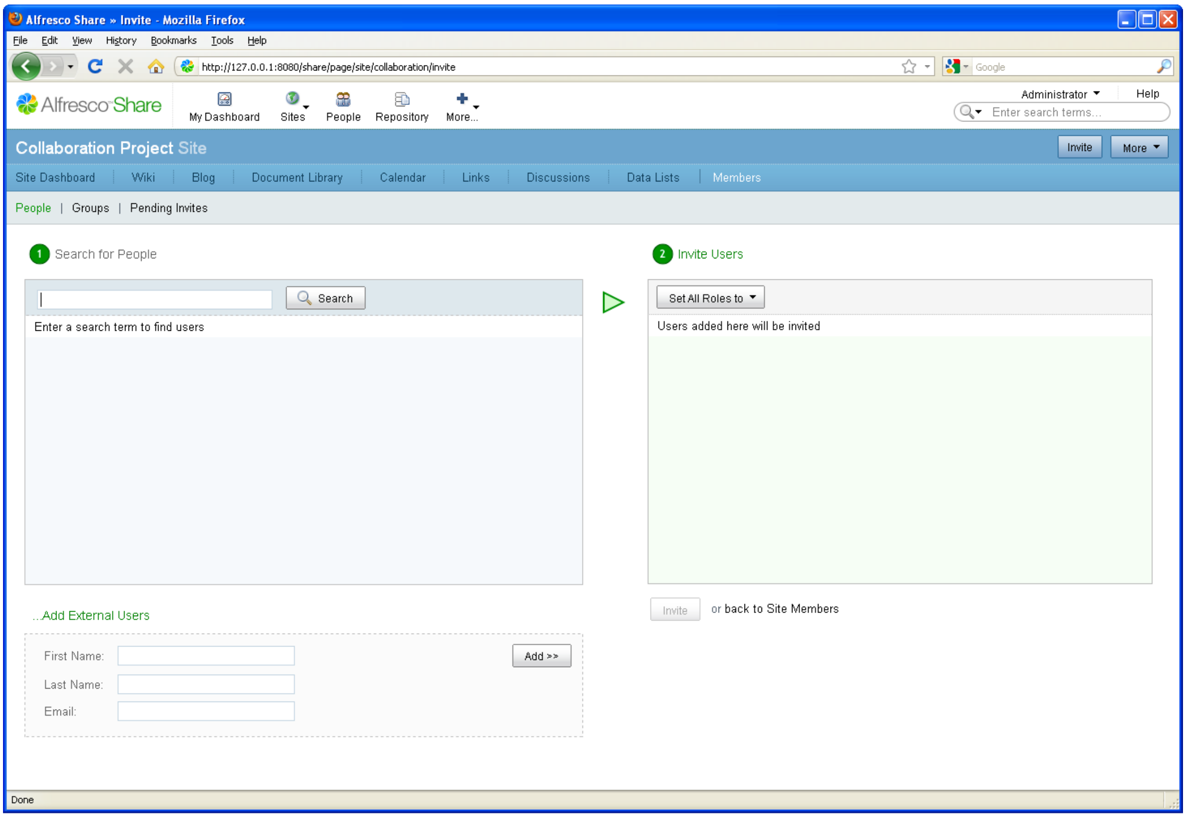
You return to the calendar with your new webinar displayed on the date you scheduled it.

Invite members to your site

After you have set up your collaborative site, you can invite people to join it.

1. Within your site, click **Invite** on the banner.

   The **Invite** page displays.



2. In the **Search for People** section, type the full or partial name of an internal user you want to invite and click **Search**.

   If you do not have any users for this installation, add them using the Share Admin Console (on the toolbar, expand the **More** menu and click **Users**). Otherwise, skip to step 4.

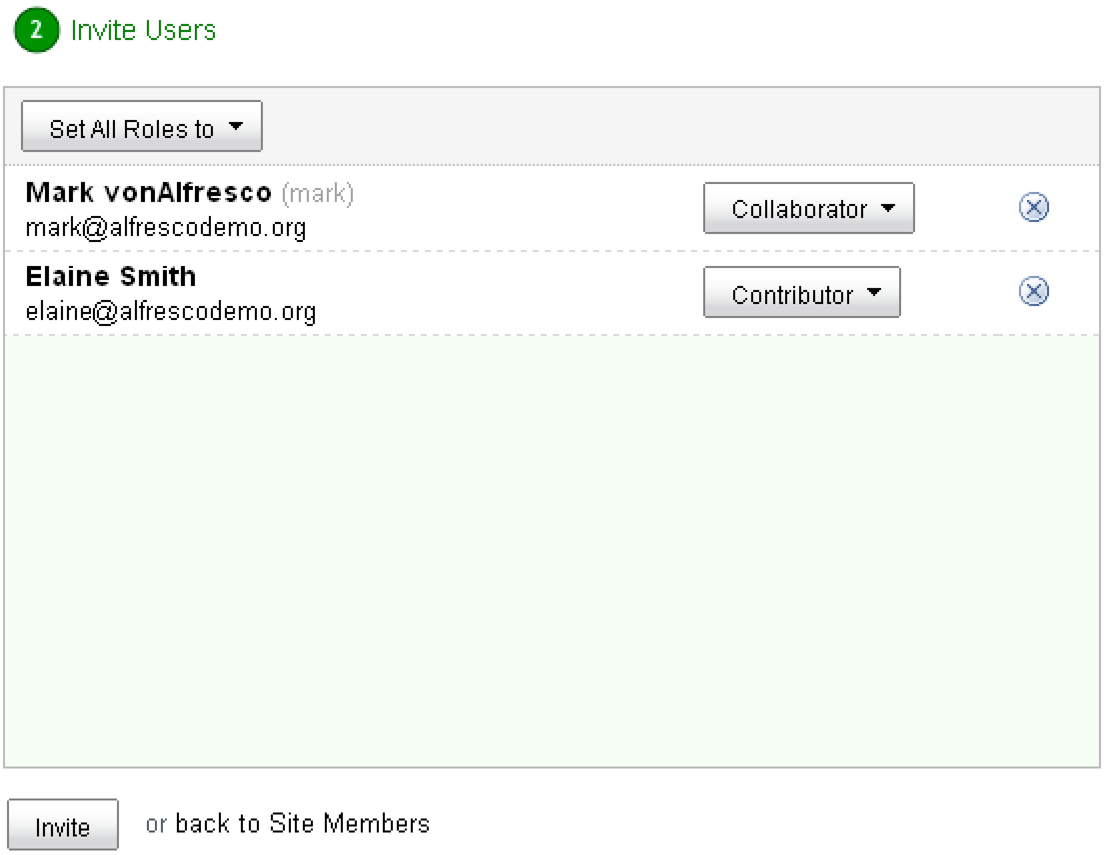
3. Click **Add** associated with the user you want to add.

   The user displays in the **Invite Users** list.

4. In the **Add External Users** section, type the first name, last name, and email for the external user you want to invite, then click **Add**.

5. In the **Invite Users** list, select a role from the **Select Role** menu for each user.

   If you want to assign all users the same role, select a role from the **Set All Roles to** menu to apply to all of the users listed. The role displays in the menu.



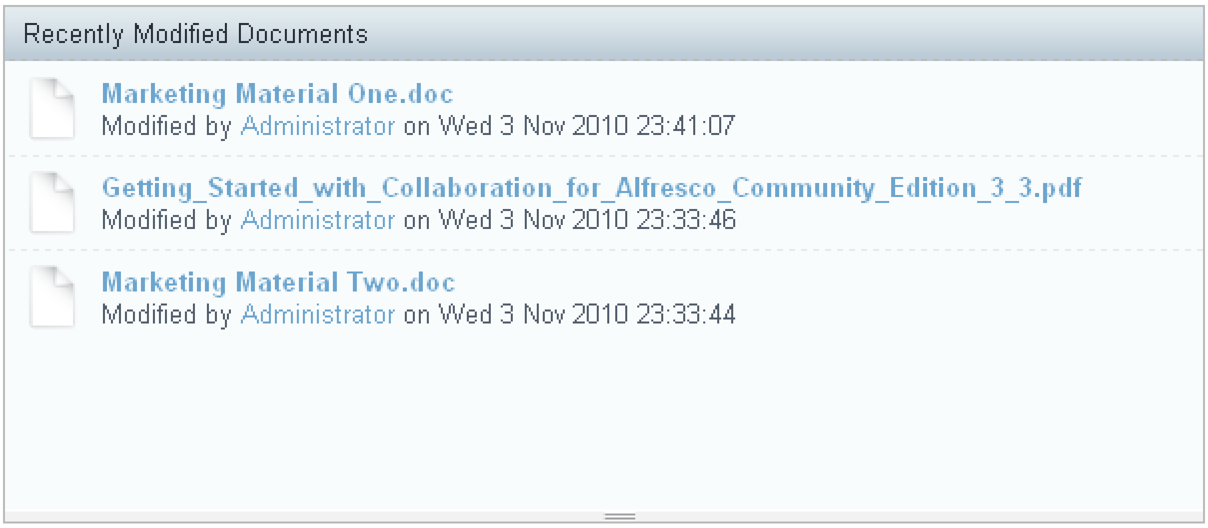
6. Click **Invite**.

You are notified that the invite has been sent via email to each member invited.

View activities within your site

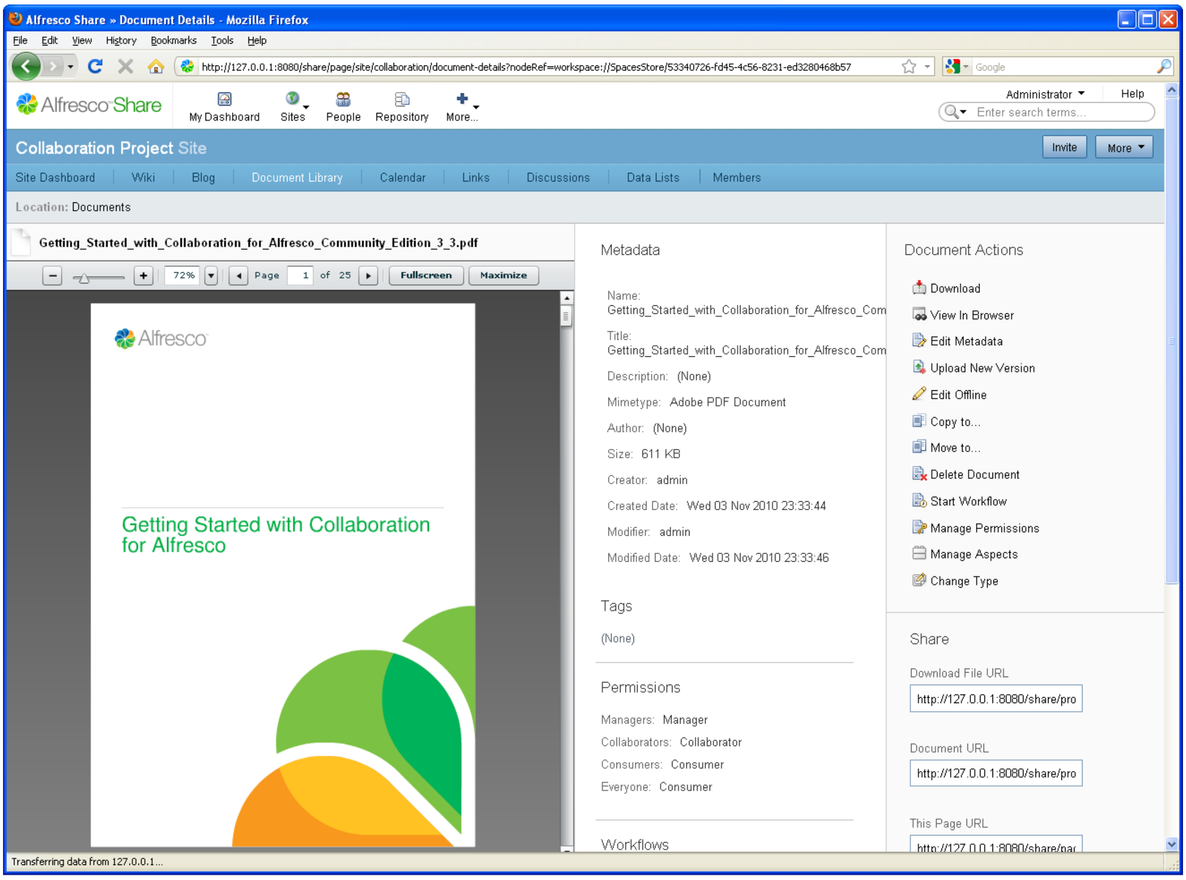
Now that you have prepared your site and invited your users, you can return to the site dashboard and see the specific activities that occurred and documents that were modified within the site.

The Recently Modified Documents dashlet displays the documents added and updated in the past seven days.



On this dashlet you can:

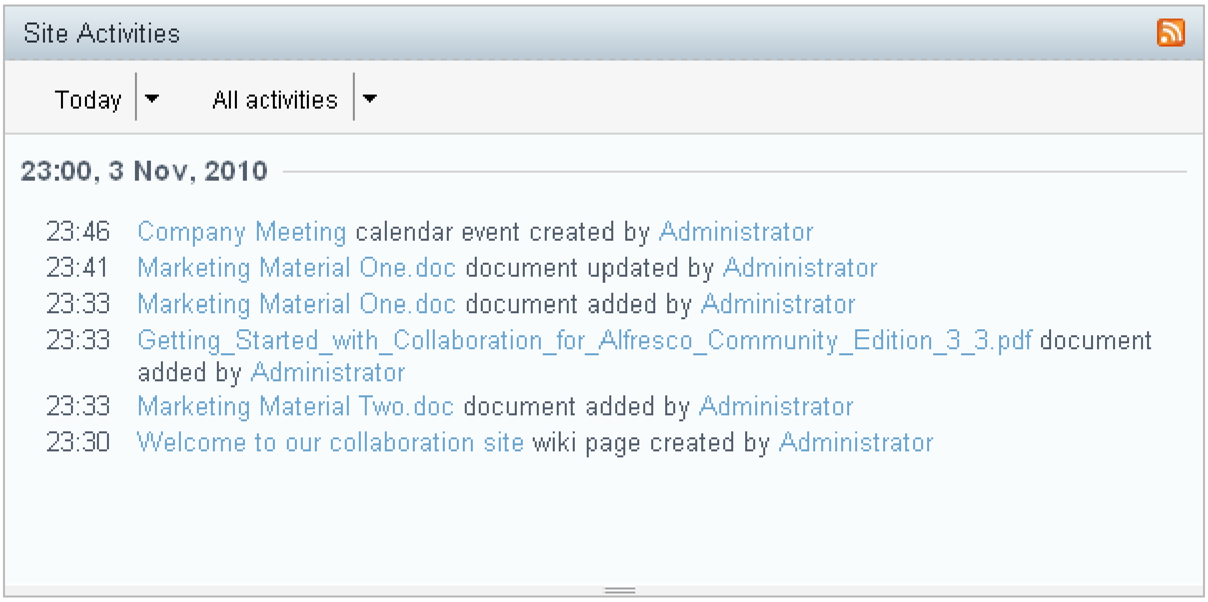
- Click the document name to display a detailed preview of the document.



- From the preview, click the link in the **Location** path to access the library folder in which this document resides.

The Site Activities dashlet displays the most recent activities that have been performed in this site.

- In this dashlet, select the **All activities** view.



- Use the resizing bar along the bottom of this and many other dashlets to adjust the height of the dashlet as desired. The height preferences are maintained between sessions.

On the Site Activities dashlet you can:

- Click an event to display the scheduled event in the Month view of the Calendar page component.
- Click a new or updated wiki page to display the page in the Wiki page component.
- Click the name of the user responsible for an activity to view their user profile.

Use SharePoint Protocol (SPP) Support with your MS Office documents

If you are familiar with editing your Microsoft™ Office documents using SharePoint, Alfresco enables you to work with the same interface, using Alfresco Share as your repository instead of SharePoint.

Refer to the Alfresco tutorial *Managing Alfresco Content from within Microsoft Office* for more details on how to use this functionality.