

Community Edition 3.3

Getting Started with Alfresco Explorer Document Management



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Introduction

The Getting Started with Alfresco Document Management Guide is a tutorial that walks you through the basic concepts of the Alfresco Document Management System.

This Getting Started guide will:

- Introduce the basic concepts of the Alfresco Document Management solution. It accompanies the download of the system available at: <http://dev.alfresco.com/downloads/> (click **Downloads** on the menu bar). You can also access an online demo by going to: <http://www.alfresco.com/products/ecm/tour/>.
- Demonstrate how to set up and configure Alfresco for managing your documents.
- Showcase a Smart Space, which is a collaborative space that uses rules to simplify the handling, management, and transformation of content.
- Show how to use additional properties and categories to organize and find content.

It is recommended that you download the Alfresco Community Edition 3.3 release and walk through this guided product evaluation guide to familiarize yourself with the Document Management features of Alfresco's DM platform offering.

Important notes

Before proceeding with the tutorial, you must ensure the installation is complete. Documentation is available online for installation assistance and reference.

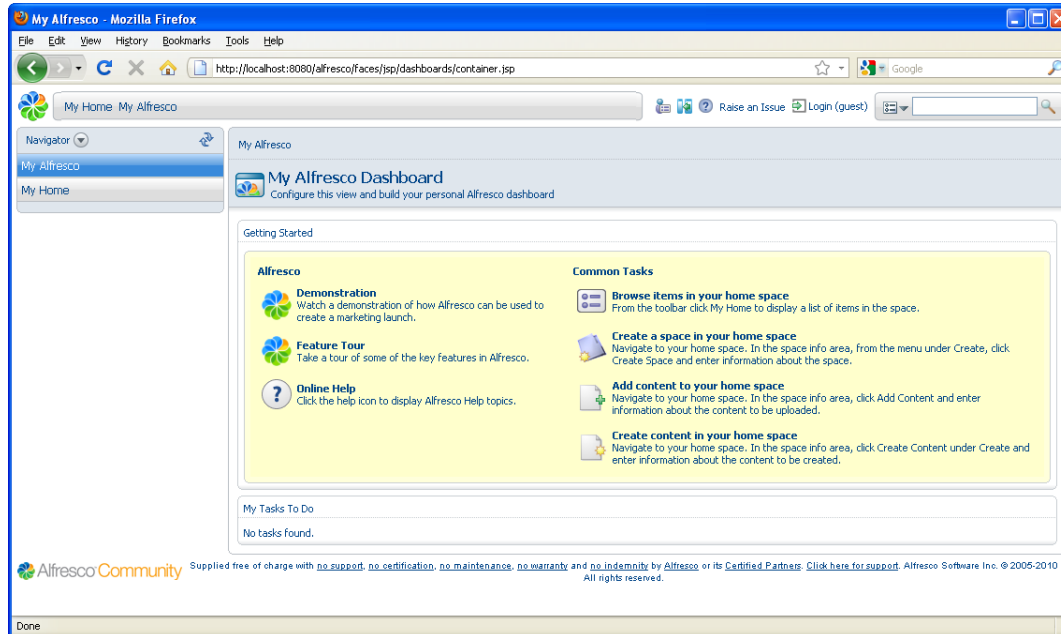
Before starting, make sure that your system has been installed properly. The installation is fast and easy for both Microsoft Windows® and Linux. If you have any issues with the installation, you can find help in the Alfresco Forums at: <http://forums.alfresco.com/>.

Alfresco also recommends reviewing and keeping up-to-date on the latest around the Document Management offering on the Developer Wiki. To bookmark this page for easy reference, please use the following link: <http://wiki.alfresco.com/wiki/>.

Starting with Explorer

Take a moment to familiarize yourself with the main page of the application.

When you open your browser to Alfresco for the first time, you are taken to the **My Alfresco Dashboard** space. This space can be used to hold any content that you would like to be available to anyone who has access to your Alfresco server.



There are three main areas in the Alfresco user interface:

- Toolbar along the top
- Sidebar at the left
- Working area at the right

Toolbar


The toolbar contains navigation buttons, which vary depending on who you are.

If you are logged in as:

- **Guest:** You have access to the **My Home** space and the **My Alfresco Dashboard**.
- **User:** You also have access to the **Company Home** and **Guest Homespace**s.
- **Administrator:** You also have access to the **User Profile** and the **Administration Console** features.



The toolbar also lets you:

- Access the Search and Help features
- Hide and show the Sidebar (click )
- View information about Alfresco CMS (click the Alfresco logo)

Sidebar

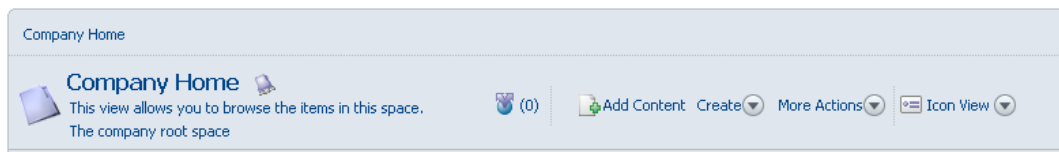
The Sidebar contains a number of different features to help you navigate, find, and work with content.

These features include the Navigator, Clipboard, Recent Spaces, Shortcuts, OpenSearch, and Categories.

Working area

The working area is a dynamic area displaying items relevant to the task you are performing.

The working area changes depending on the information you are looking at or the task you are performing. The top of the working area always displays a navigation breadcrumb that allows you to jump to any part of the breadcrumb path. For information views, there is a summary area along with actions or alternative views. The details and options also change depending on what you are looking at and doing, as well as who you are.

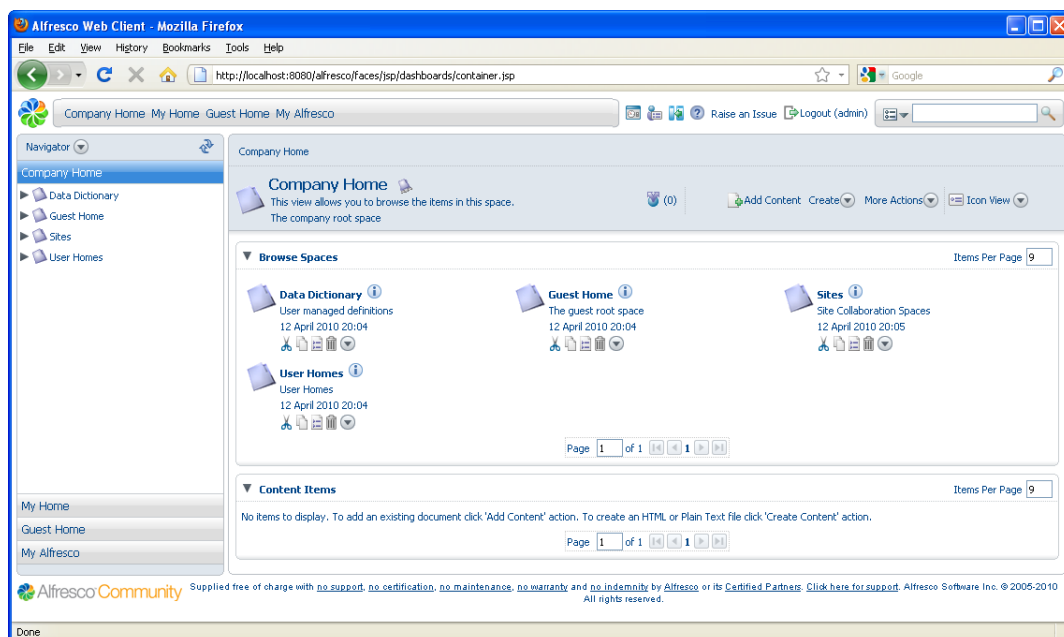


Logging in

To add and create content in Alfresco, you must log in. When Alfresco is installed, it creates an administration user called *admin* with a default password of *admin*. The **Password** field is case sensitive.


1. Click the **Login (guest)** link in the toolbar.
2. On the **Login** page, enter *admin* in the **User Name** box.
3. Enter *admin* in the **Password** box and click **Login**.
4. In the toolbar, click **Company Home**.

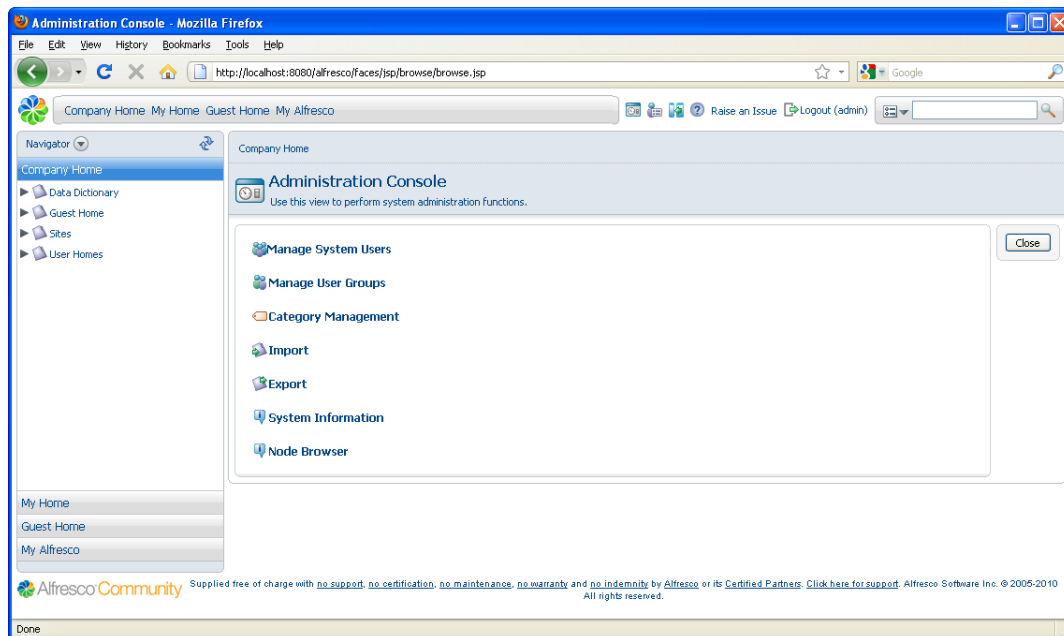
The **Company Home** space displays.



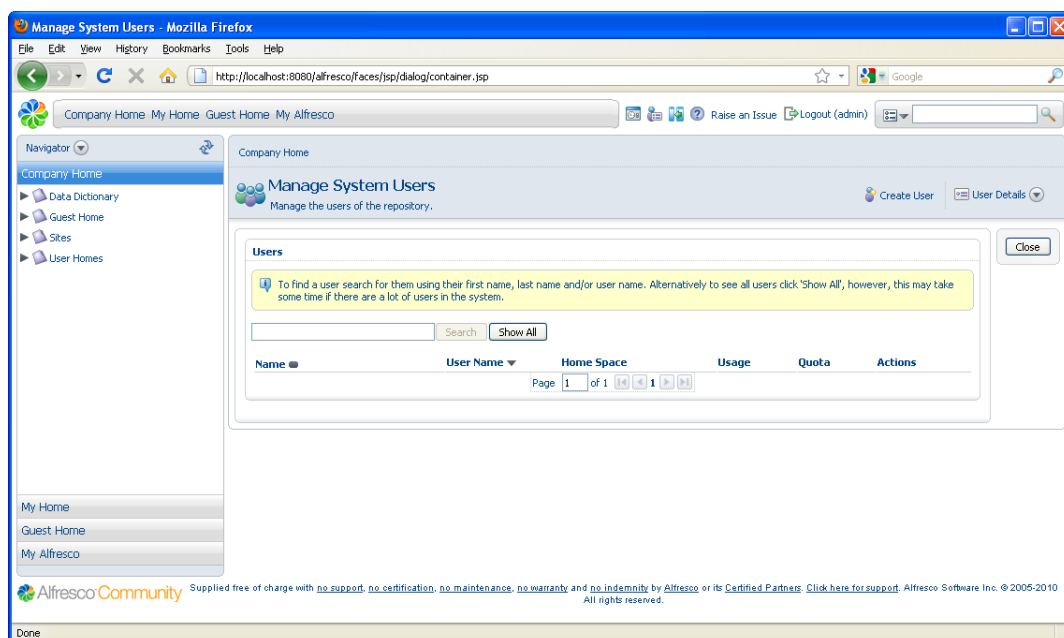
Adding new users

As part of adding the new user, you can define the user's home space. When Alfresco is installed, a **User Homes** space is created automatically to contain all user home spaces.

1. On the toolbar, click  (**Administration Console**).
The Administration Console opens.



2. Click **Manage System Users**.
The **Manage System Users** page opens.



3. Click **Show All** to list the current users, including the pre-configured **admin** account.
4. In the header, click **Create User** to open the **New User Wizard**.
5. In the **New User Wizard**, specify the person properties. Use the name **Bob Smith** and the email address **bob@alfrescodemo.org**, then click **Next**.

Boxes marked with an asterisk are required.

6. Create a user name and password.
7. Create a home space using the default location, **User Homes**, that was created during installation and name the space `Bob Smith`.

Note: User names are case insensitive but domains are case sensitive. Users can log in with any combination of case for their name but the domain must remain as created.

For example, the following are true for logging in:

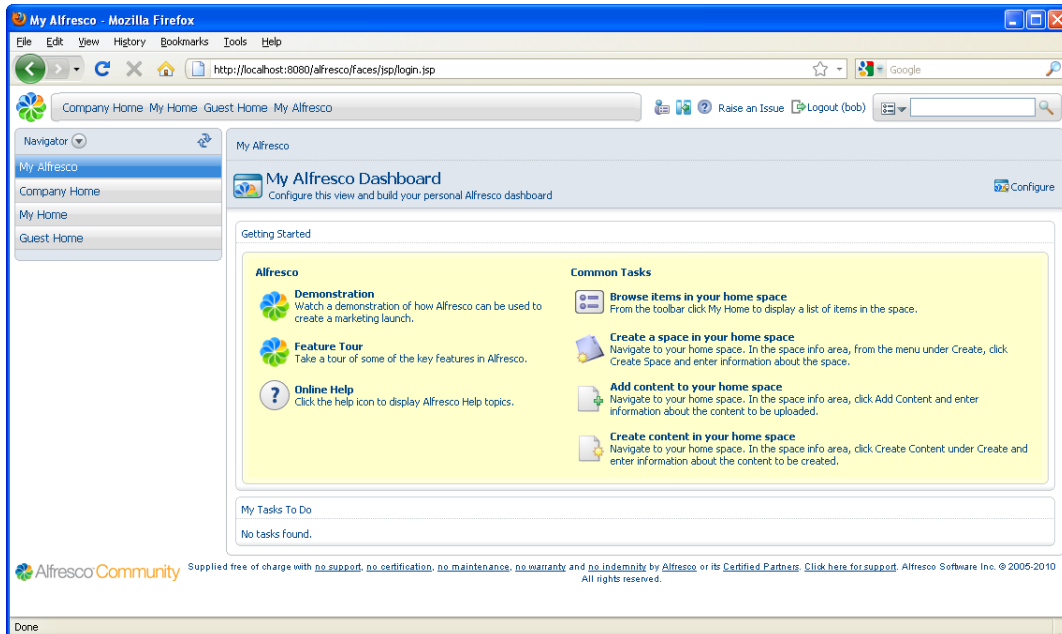
- `jsmith/ALFRESCO` can log in as: `jsmith/ALFRESCO` or `JSMITH/ALFRESCO` or `JsMiTh/ALFRESCO`
 - `jsmith/alfresco` can log in as: `jsmith/alfresco` or `JSMITH/alfresco` or `JsMiTh/alfresco`
 - `jsmith/AIFrEsCo` can log in as: `jsmith/AIFrEsCo` or `JSMITH/AIFrEsCo` or `JsMiTh/AIFrEsCo`
8. Click **Next** to view a summary of the user created and click **Finish**.
This creates the new user, Bob Smith, and his home space. Click **Show All** to list the users.
 9. Create another user named `Joe Bloggs` for future use.

Creating spaces and content

After adding a new user, you can log in as that user.

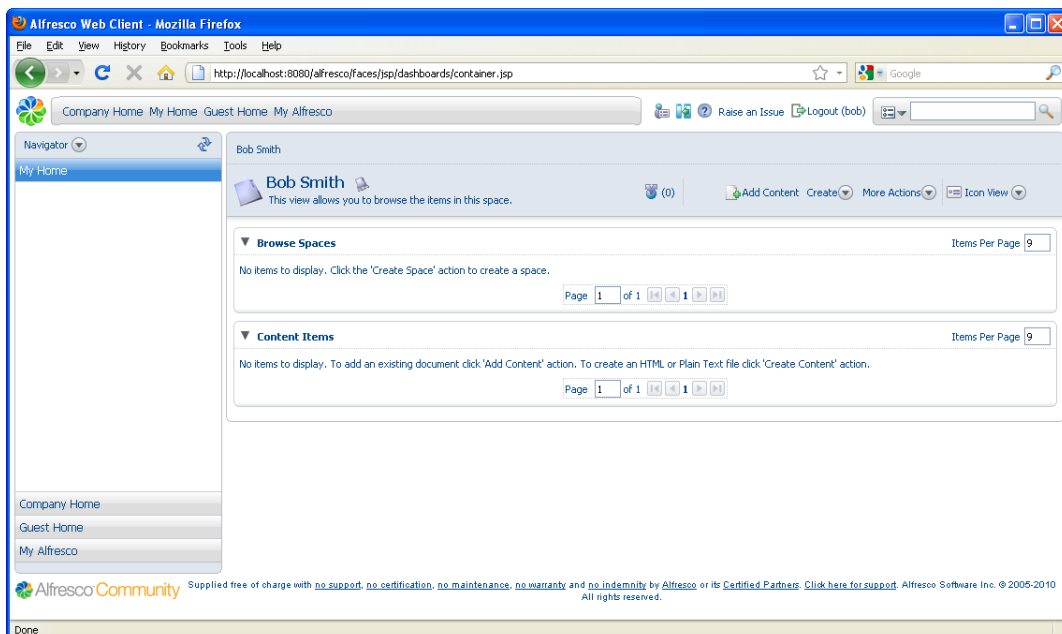
1. On the toolbar, click **Logout**, then log in using the details for Bob Smith.

You are taken to your **My Alfresco Dashboard** by default, but you can still easily navigate to your home space (**My Home**), **Company Home**, or elsewhere.



2. Click **My Home** in the sidebar.

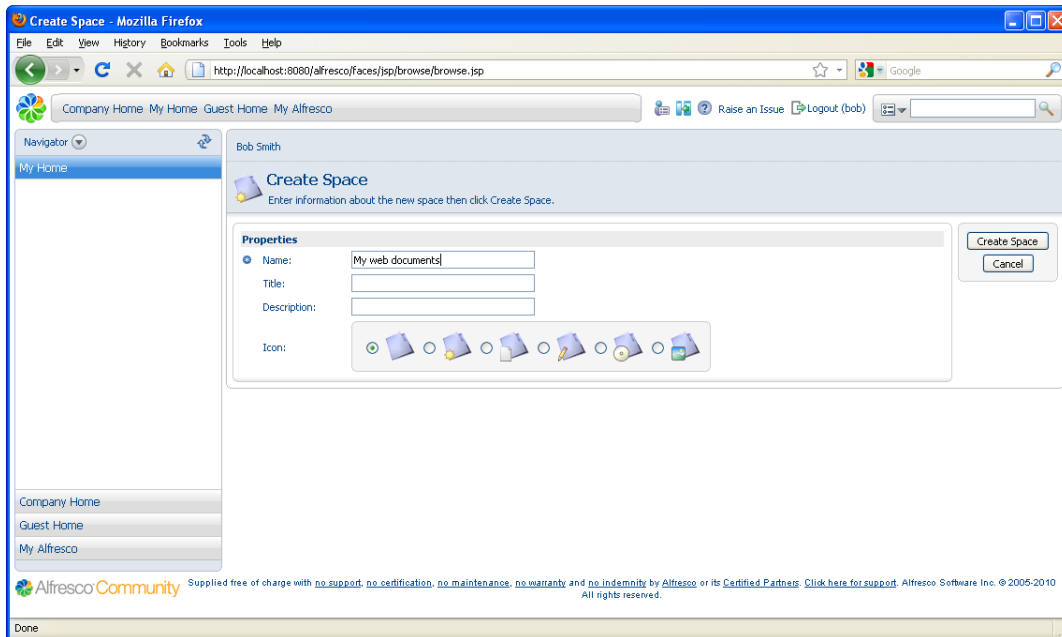
In the home space you can add and create content items, and create sub spaces.



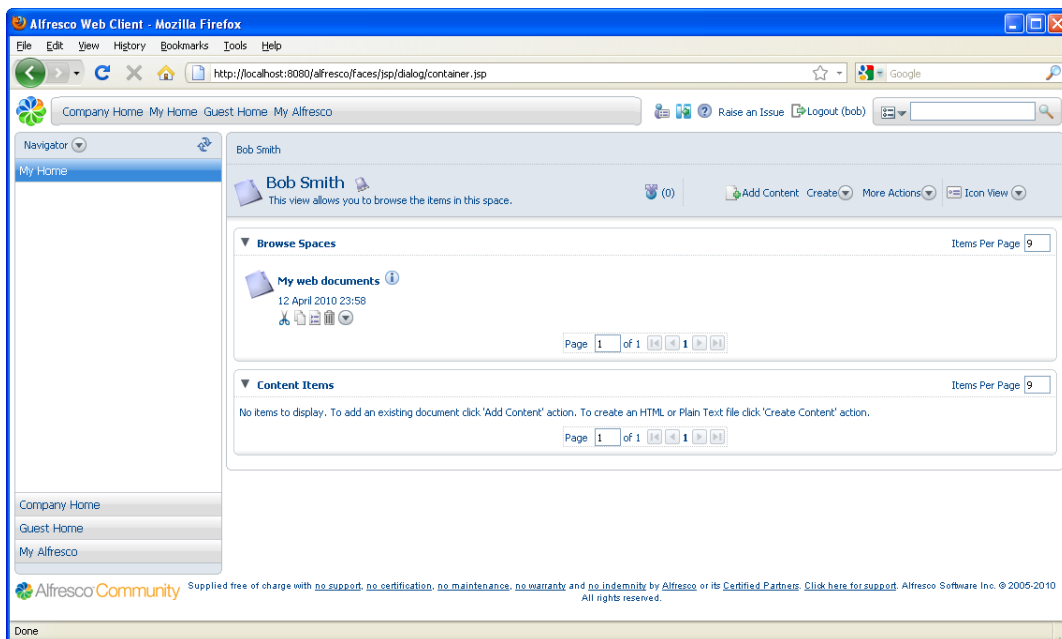
Creating a space


Before adding content, organize your home space to meet your business needs (including collaboration). For this example, you will create a sub space called *My web documents* for HTML files.

1. In the **Create** menu in the header, click **Create Space**.
The **Create Space** page displays.
2. Type `My web documents` as the space name. Optionally, you can specify a title and description, and select an icon to represent the type of content you intend to put in the space.



3. Click **Create Space**. Your home space displays with the new space listed.



4. In the **Navigator** header in the sidebar, click  (**Refresh**) to synchronize the navigator bar.
You can now create web content directly in the browser.

Creating and editing content in a space

In this task, you will create content in a space using the **Create Content Wizard**.

1. Open the **My web documents** space (click the icon or the name).

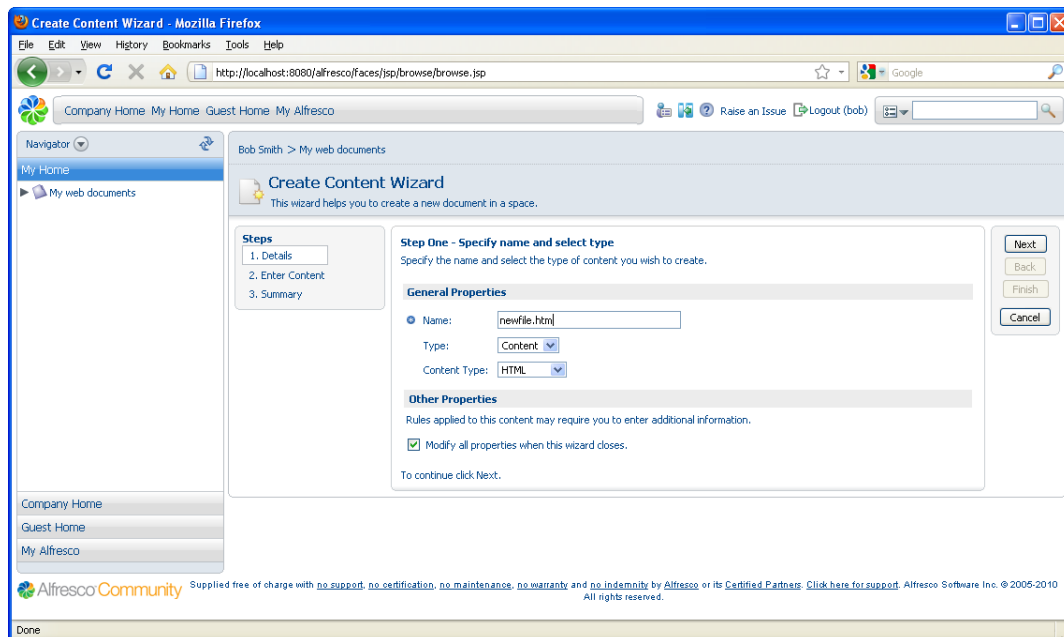
2. In the **Create** menu, click **Create Content**.

The **Create Content Wizard** starts.

3. Type `newfile.htm` as the file name.

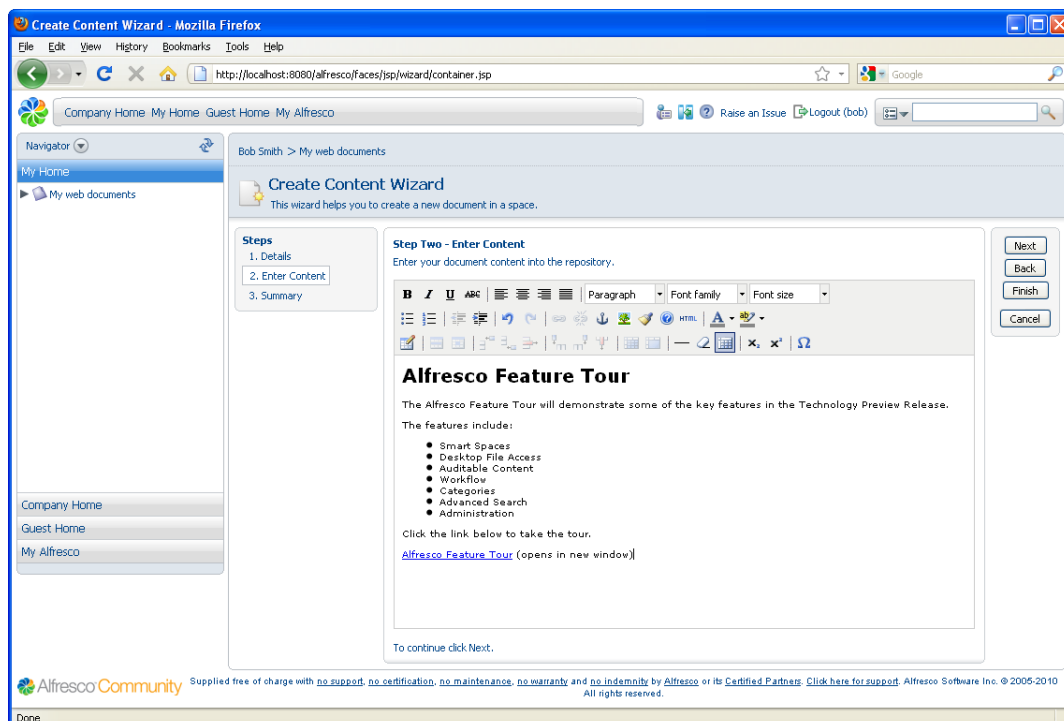


The remaining general properties are populated by default. You can modify them.



4. Click **Next**.

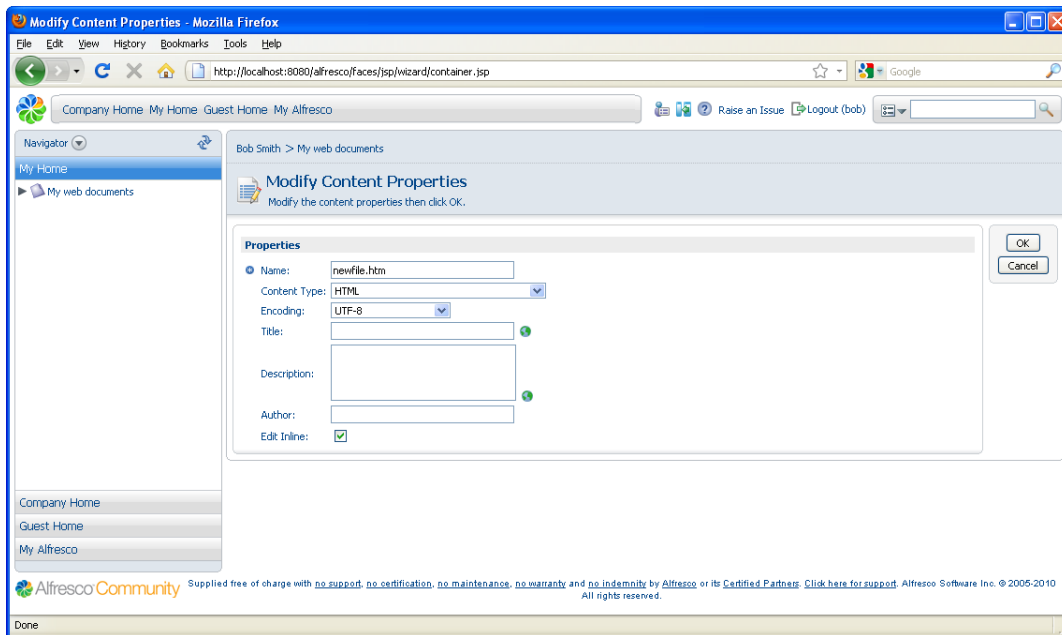
5. In Step Two - Enter Content, add the following example web page, including text formatting.



6. Click **Next** to display the summary page.

7. Click **Finish**.

The **Finish** button becomes active when there is enough information to complete a task. Any additional steps are optional. The **Modify Content Properties** page displays the full set of properties for the document created.

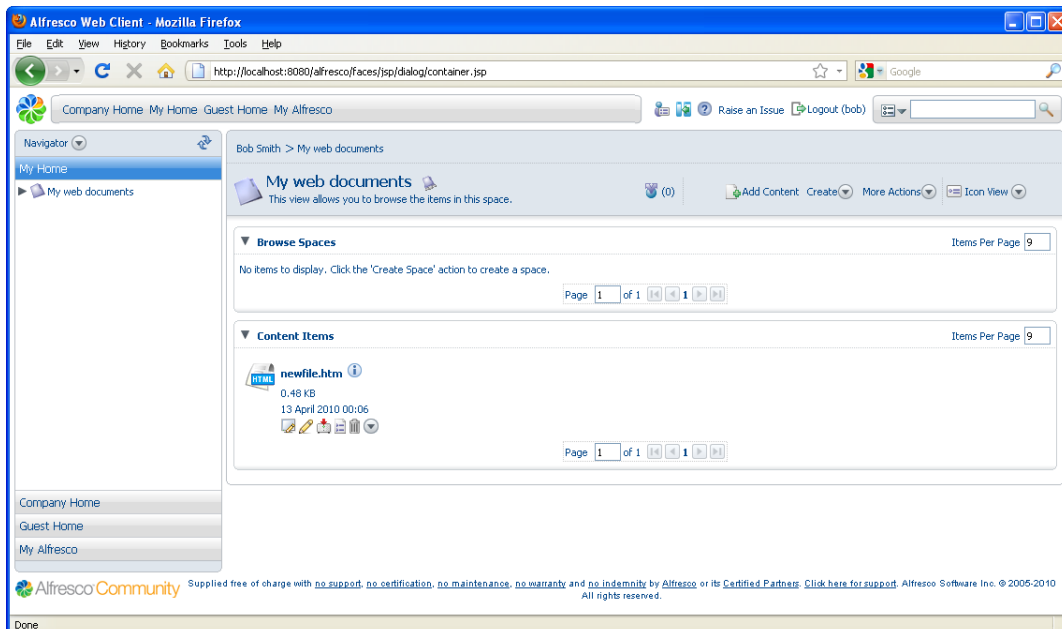


8. Review the properties and add new ones if you like. These properties vary for different Types and Smart Spaces.
9. Click **OK** to save the properties and return to the **My web documents** space.




If there are any required properties, **OK** is not enabled until they have been completed.

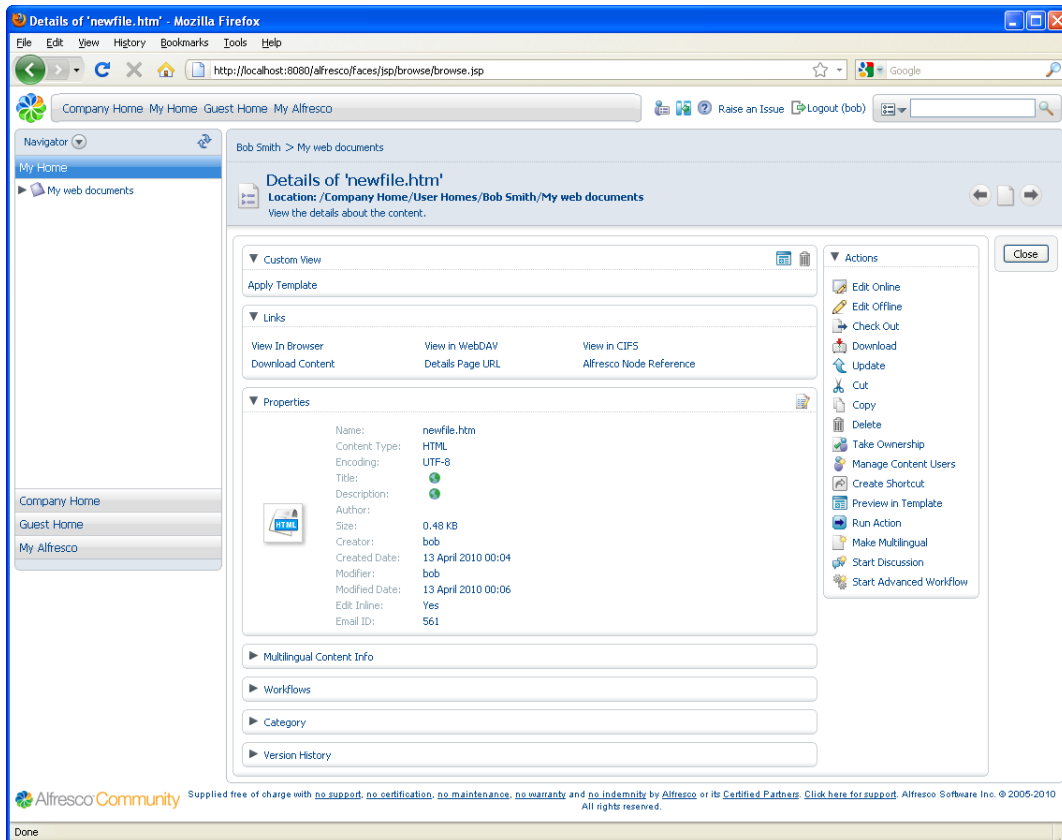
The new file is listed in the **Content Items** pane.




Managing content item details

You can view the details (properties and metadata) of a content item at any time.

1. Click  (**View Details**) associated with the content item to display the **Details** page with the **Properties** pane expanded.
If you are not sure which icon performs what action, hover your mouse over the icon and a tool tip displays its action.



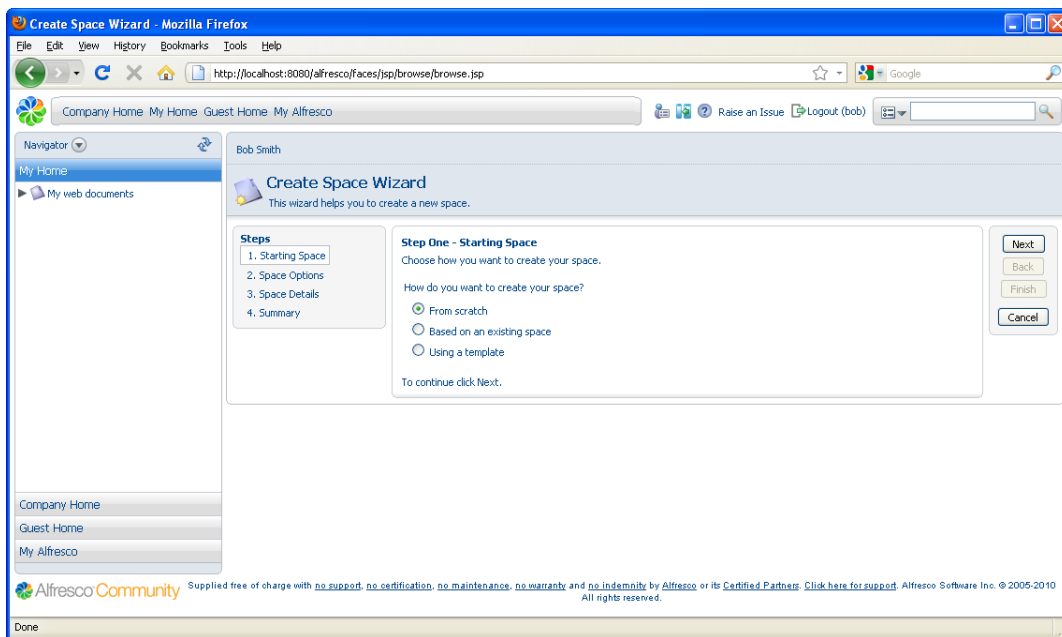
2. Click  (**Modify**) on the top right of the **Properties** pane to edit the content properties. Click **OK** when done.
3. Click the **View In Browser** link in the **Links** panel to view or download through the browser.

Working with space templates

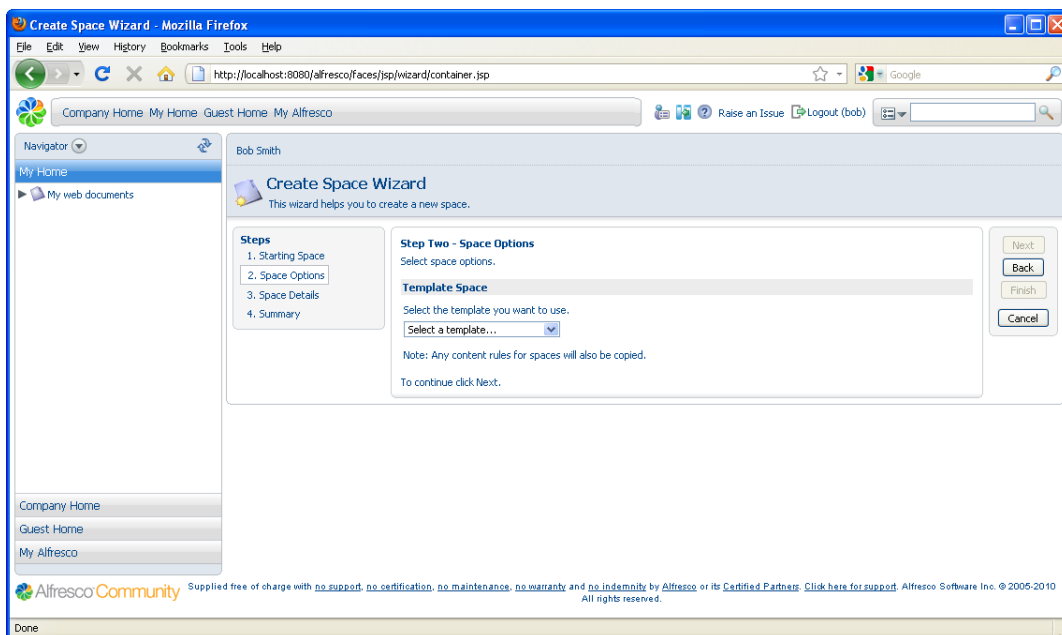
You can use templates that you create or that are provided to accelerate the setup of a space and to ensure consistency across multiple spaces.

In this scenario, you will set up a project space with multiple sub spaces in which you will collaborate with other team members to create, approve, and publish documents. Part of the requirements you have for this space are provided by a template.

1. Navigate to your home space (you can use the breadcrumb path or click **My Home** on the toolbar).
2. In the **Create** menu, click **Advanced Space Wizard**. The **Create Space Wizard** page displays.

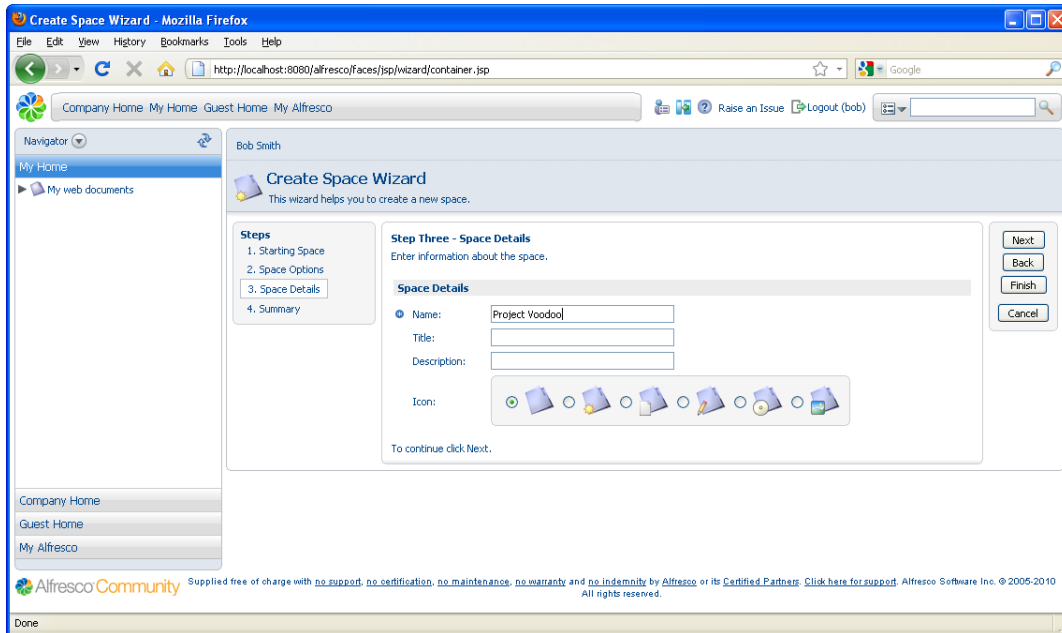


3. In Step One - Starting Space, select **Using a template** and click **Next**.



4. In Step Two – Space Options, select the **Software Engineering Project** template from the list and click **Next**.

5. In Step Three - Space Details, type `Project Voodoo` as the **Name**. Optionally, you can specify a title and description, and select an icon.



6. Click **Finish** to return to the **My Home** space where the Project Voodoo space has been created using the Software Engineering Project template.

Building smart spaces

Define rules within a space to automatically manage the content.

One of the key benefits of Alfresco is the ability to define rules that affect content within a space. These rules can be used to provide creative solutions to automation and management of content. Rules are applied when content moves in or out of a space and may also apply to content directly in the space or in sub spaces.

A rule is made up of three main elements:

- The conditions on the content for the rule to match
- The actions that are performed on the content
- The type of rule it is

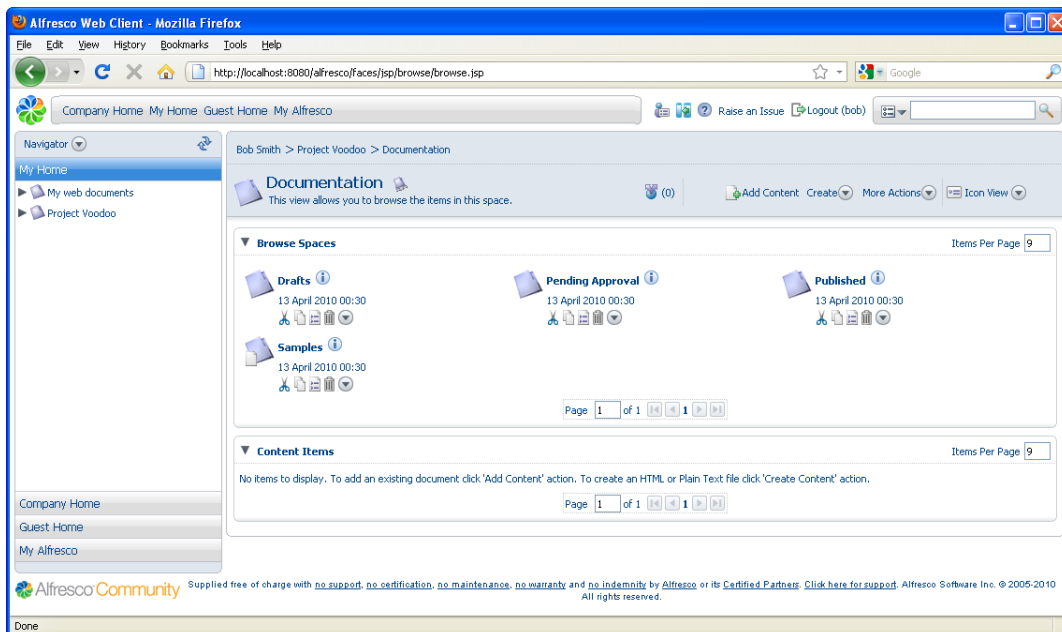
Any number of conditions and actions may be defined in a rule.

Creating content rules

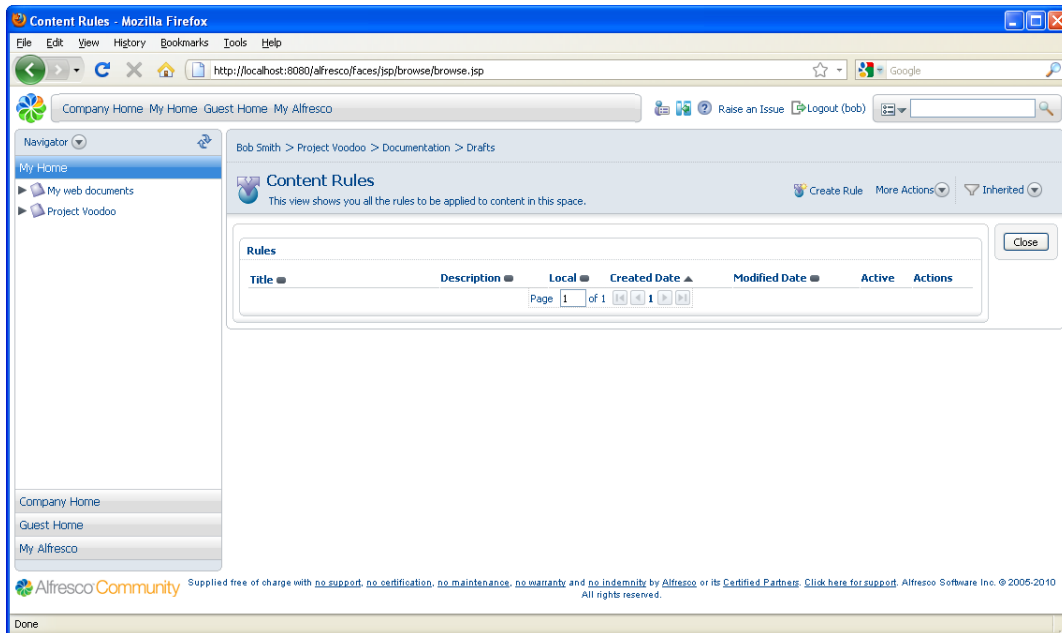
In this task you will create content rules within a space.

You will create a few rules in the Project Voodoo **Documentation** space to:

- Add content versioning because multiple authors will collaborate on the documents
 - Set up a simple workflow that allows the documents to progress through these spaces
1. Navigate to the Project Voodoo **Documentation** space. This space contains four sub spaces to hold documents in different stages of completion, as well as a space with sample content.



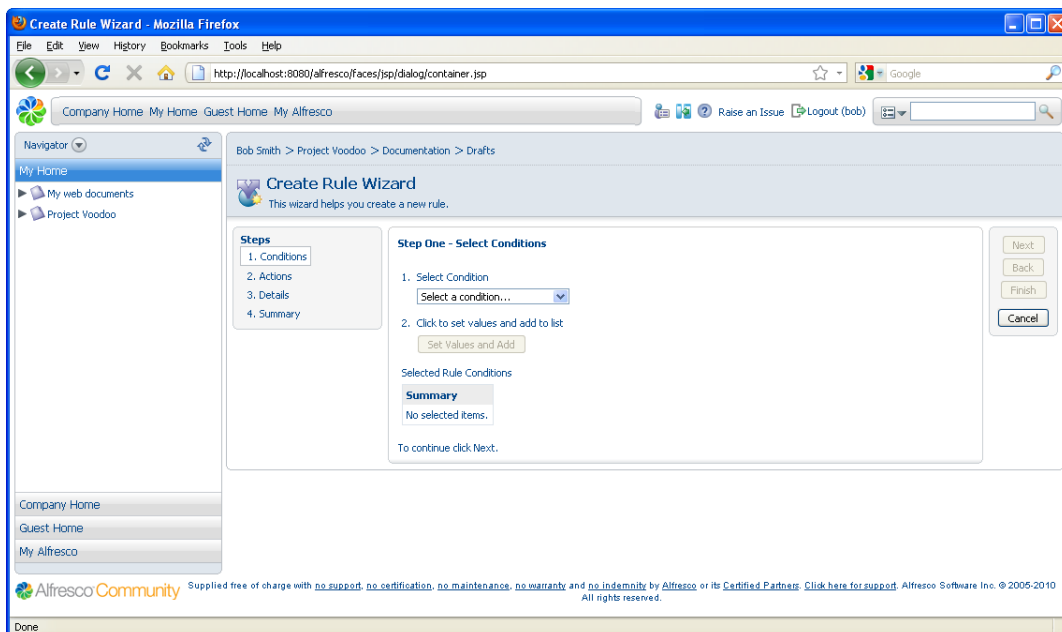
2. Click **Drafts** to open the **Drafts** space.
3. In the **More Actions** menu, select **Manage Content Rules**. The **Content Rules** page appears.



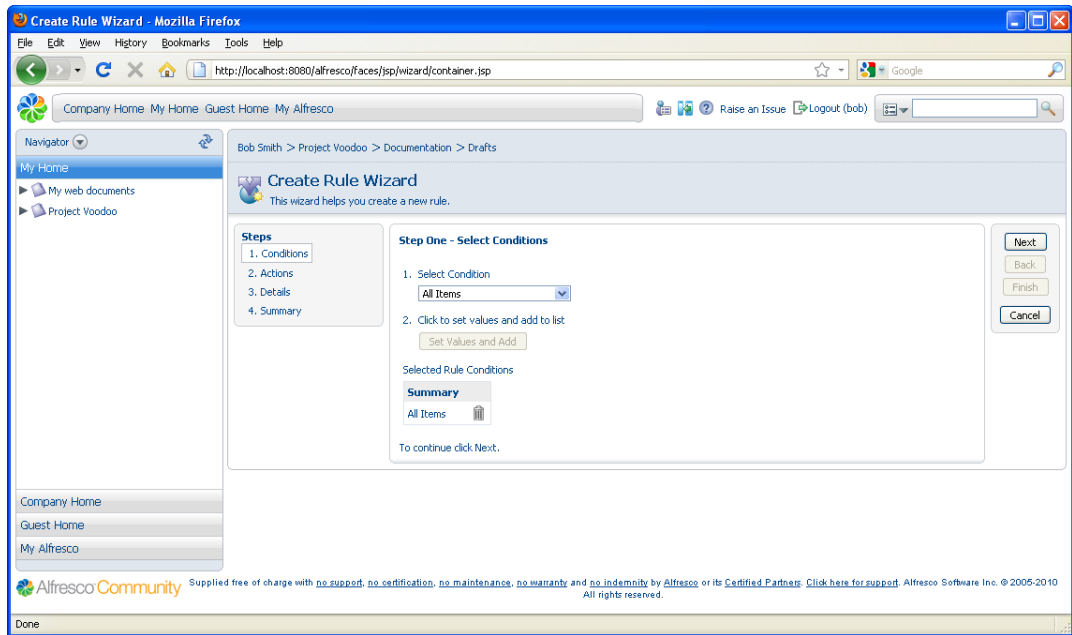
Adding a content versioning rule

In this task, you will add a versioning rule for the content using the **Create Rule Wizard**.

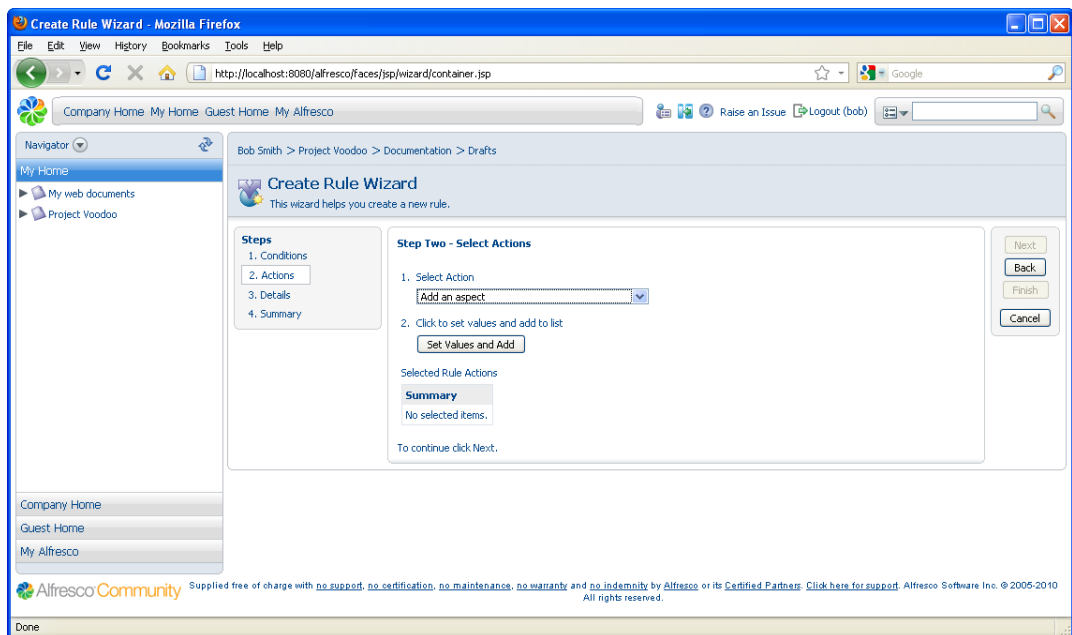
1. In the header, click **Create Rule** to open the **Create Rule Wizard**.



2. In Step One - Select Conditions, define the conditions that are applied to the content before the action is performed.
 - a. In the **Select Condition** list, select **All Items** so the action is performed on any content added to the space.
 - b. Click **Add to List** to set the condition. The condition displays in the **Summary** list.



- c. Click **Next**.
3. In Step Two - Select Actions, you define the actions to be performed on the content.
 - a. In the **Select Action** list, click **Add an aspect**.



- b. Click **Set Values and Add**.
- c. In the **Select required feature** menu, select **Versionable** from the value list and click **OK**.
- d. Click **Next**.
4. In Step Three - Enter Details, select the rule type, which determines when the rule gets tested. The options are:
 - **Items are created or enter this folder:** The action occurs when content is copied, created or added to the space.
 - **Items are deleted or leave this folder:** The action occurs when content is moved or deleted from the space.

- **Items are updated:** The action occurs when content is updated in the space.
- a. In the **Type** menu, select **Items are created or enter this folder**.
- b. In the **Title** box, type All versioned.

Create Rule Wizard - Mozilla Firefox

http://localhost:8080/alfresco/faces/jsp/wizard/container.jsp

Company Home My Home Guest Home My Alfresco

Bob Smith > Project Voodoo > Documentation > Drafts

Create Rule Wizard
This wizard helps you create a new rule.

Steps

1. Conditions
2. Actions
3. Details
4. Summary

Step Three - Enter Details

Type: **Items are created or enter this folder**

Title: **All versioned**

Description:

Other Options

☐ Apply rule to sub spaces

☐ Run rule in background

☐ If this option is selected the rule will execute in the background so the results may not appear immediately.

☐ Disable rule

To continue click Next.

Next Back Finish Cancel

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Done

- c. Click **Next**.

Create Rule Wizard - Mozilla Firefox

http://localhost:8080/alfresco/faces/jsp/wizard/container.jsp

Company Home My Home Guest Home My Alfresco

Bob Smith > Project Voodoo > Documentation > Drafts

Create Rule Wizard
This wizard helps you create a new rule.

Steps

1. Conditions
2. Actions
3. Details
4. Summary

Summary
The information you entered is shown below.

Rule Type: inbound

Name: All versioned

Description:

Apply rule to sub spaces: No

Run rule in background: No

Disable rule: No

Conditions: All Items

Actions: Add aspect 'Versionable'

To create the rule click Finish. To review or change your selections click Back.

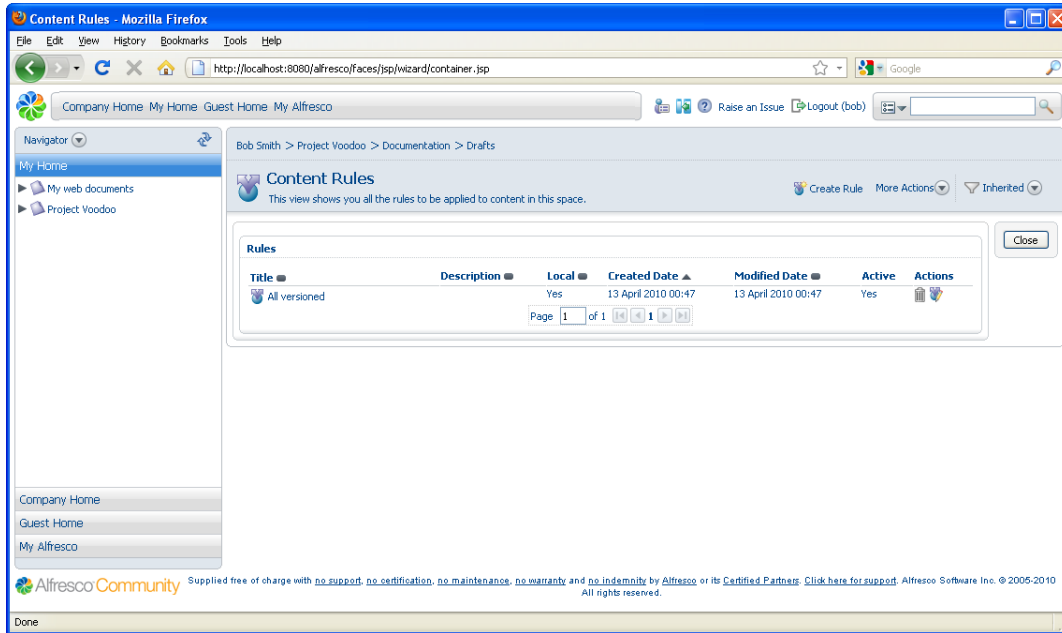
Next Back Finish Cancel

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Done

5. Verify the information you have specified for the rule and click **Finish**.



The rule displays on the **Content Rules** page.

Adding simple workflow rules

This topic explains the simple workflow rules you will add to the space.

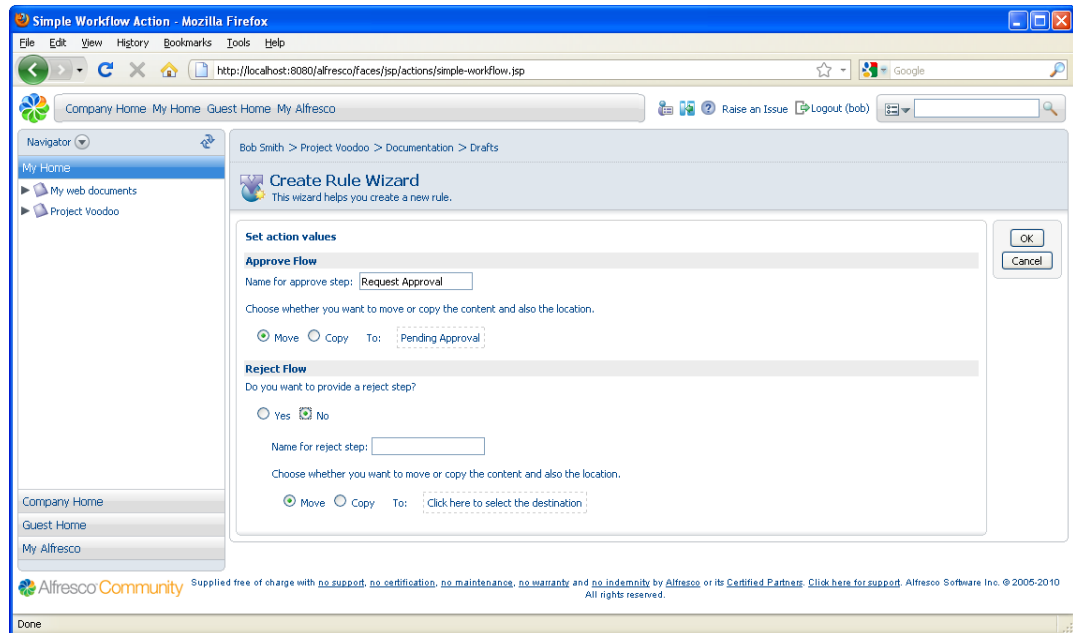
The workflow rules move the content item through the spaces, based on specific criteria. You will create the following rules:

- Request Approval: move from **Draft** space to **Request Approval** space
- Publish: move from **Request Approval** space to **Publish** space

Requesting draft approval

In this task you will create a simple workflow rule to apply to content in the **Drafts** space.

1. Ensure you are on the **Content Rules** page in the **Drafts** space. Click **Create Rule** in the header.
2. In Step One, specify **All Items** as the condition.
3. In Step Two, specify **Add simple workflow** as the action.
 - a. Enter Request Approval as the **Approve Flow** step name.
 - b. Select to **Move** the item to the **Pending Approval** space.
 - c. Select **No** as the **Reject Flow** step.



4. In Step Three, specify the **Type** as **Items are created or enter this folder** and enter **Add simple workflow** as the **Title**.
5. Click **Finish** to complete the wizard.

Publishing the approved content

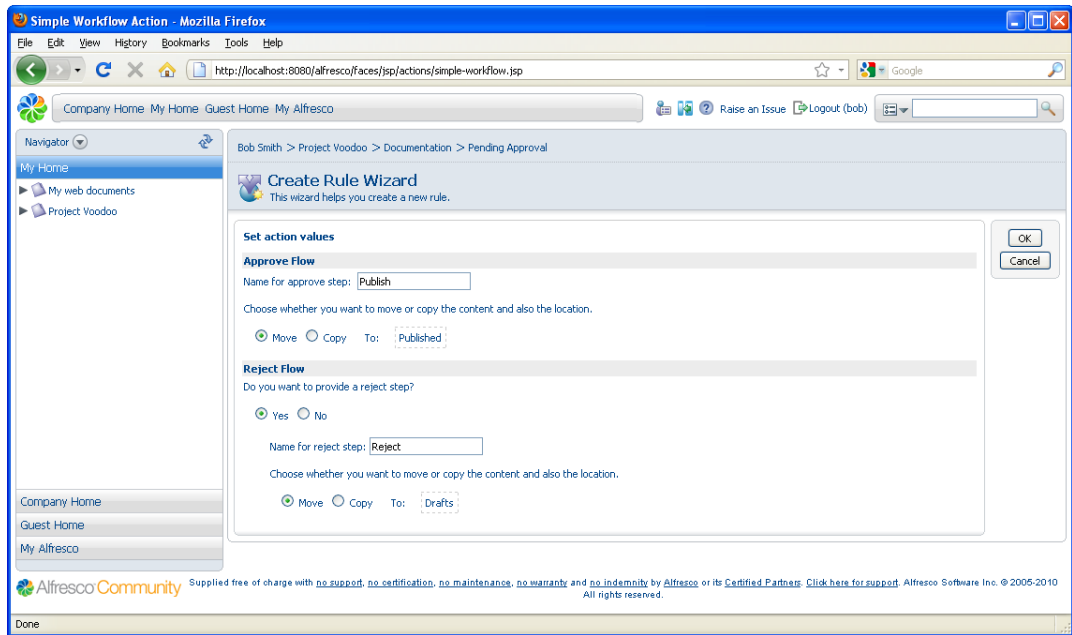
Continue with the workflow rule that will apply to content in this space.

Now that you have finished defining rules in the **Drafts** space, navigate to the **Pending Approval** space (**Project Voodoo > Documentation > Pending Approval**) to add the next step in the workflow.



There is no need to add a rule to make all content versioned, since content has moved from the **Drafts** space where it will have already been versioned.

1. In the **More Actions** menu, click **Manage Content Rules**.
2. Click **Create Rule** in the header.
3. In Step One, specify **All items** as the condition.
4. In Step Two, specify **Add simple workflow** as the action.
 - a. Enter **Publish** as the **Approve Flow** step name.
 - b. Select to **Move** the item to the **Published** space.
 - c. Select **Yes** as the **Reject Flow** step and name it **Reject**.
 - d. Select to **Move** the item back to the **Drafts** space.




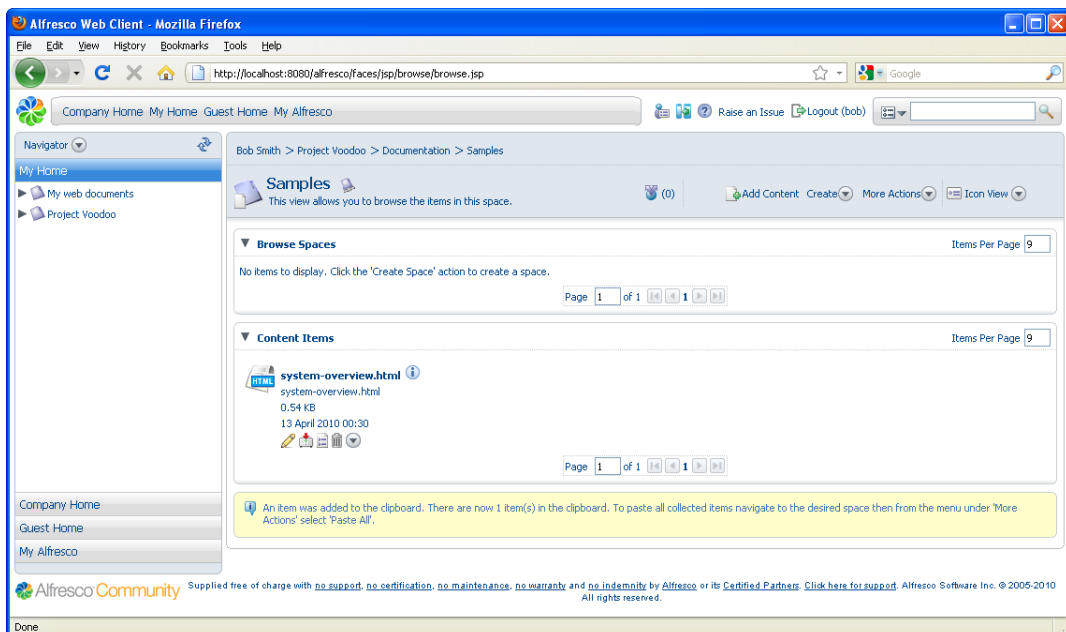
5. In Step Three, specify the **Type** as **Inbound** and type Add simple workflow as the **Title**.
6. Click **Finish** to complete the wizard.


To see these rules in action, you must add some content.

Moving content using the clipboard

A sample software overview document is created as part of the template you are using. Use this document to test the rules.

1. Navigate to the **Samples** space (**Project Voodoo > Documentation > Samples**).
2. In the **Content Items** pane, click  for the item **system-overview.html** and select **Copy**. A message indicates that the document was successfully added to the clipboard.



3. In the sidebar, click  and select **Shelf** to view the clipboard contents.
4. Navigate to the **Drafts** space.

5. In the **More Actions** menu, click **Paste All**. A new copy of the document **system-overview.html** is pasted in the **Drafts** space and the contents of the clipboard are removed.

If the content is cut, a reference to it is placed in the clipboard and the content remains in its original place until you paste it in the new location. The clipboard contents are not retained over login sessions, so if you cut some content and then log out, the content stays where it was originally located.

You can also paste items as links, which creates an item that points to another space or content, but can have a different name and description.

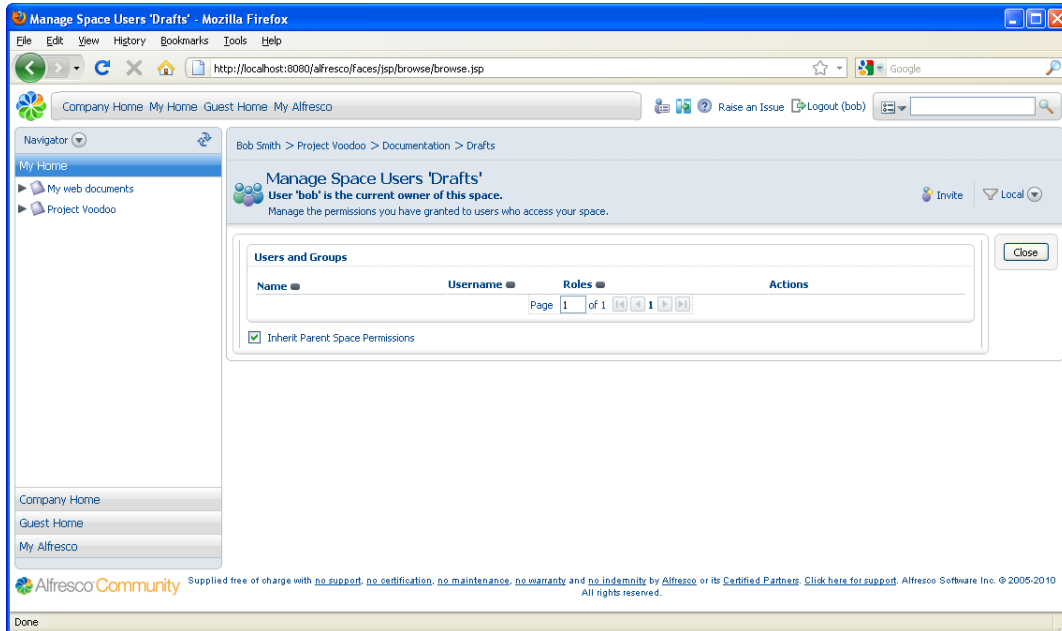
6. In the sidebar, display the Navigator again.

Collaborating with other users

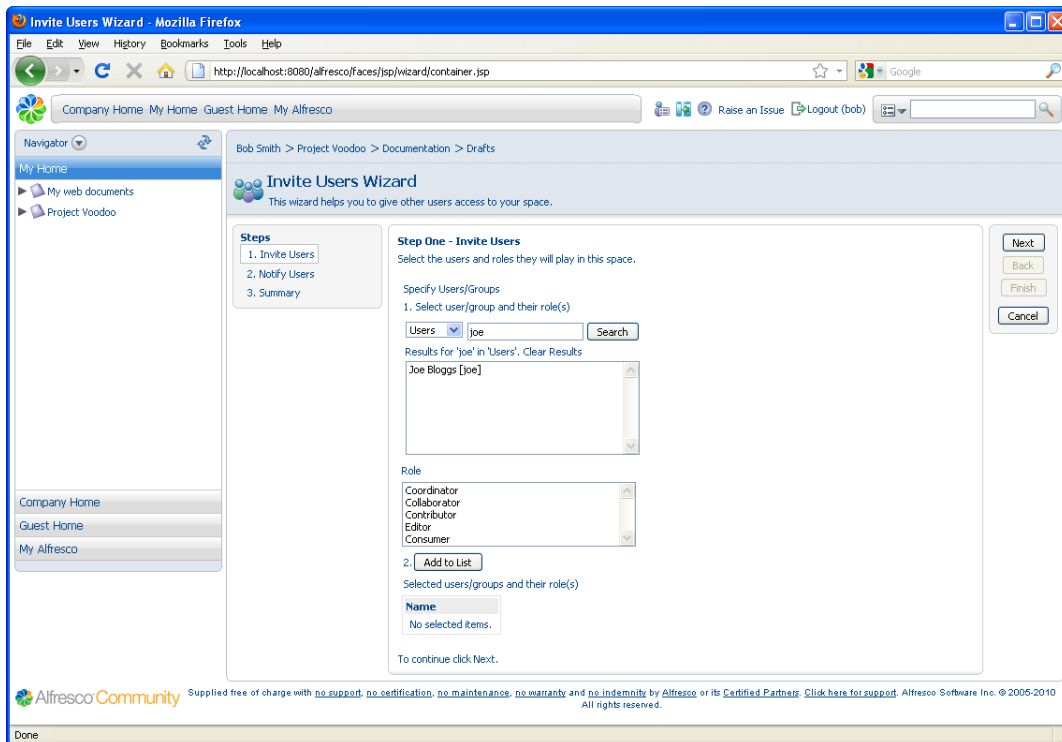
To work with other users on this project, you will invite them to a space for collaboration.

1. Ensure you are in the **Drafts** space. In the **More Actions** menu for this space, click **Manage Space Users**.

This page displays users who have permission to work on content in the **Drafts** space.



2. Click **Invite** in the header to invite a user to the space.
This opens the **Invite Users Wizard**.
3. In Step One - Invite Users, you select a user and specify their role. Type `joe` and click **Search**. The list of results displays.



4. Select **Joe Bloggs**, assign him the **Consumer** role, and click **Add to List**.

5. Click **Next**.
6. In Step Two - Notify Users, you are given the option to send the invited users an email telling them about the invitation. As you haven't configured email, select **No** and click **Next**.
7. Verify the information in the Summary and click **Finish**.
8. Click **Close** to return to the **Drafts** space.


Editing content in a collaborative space

You can now explore how to edit content in a collaborative space while protecting the content.

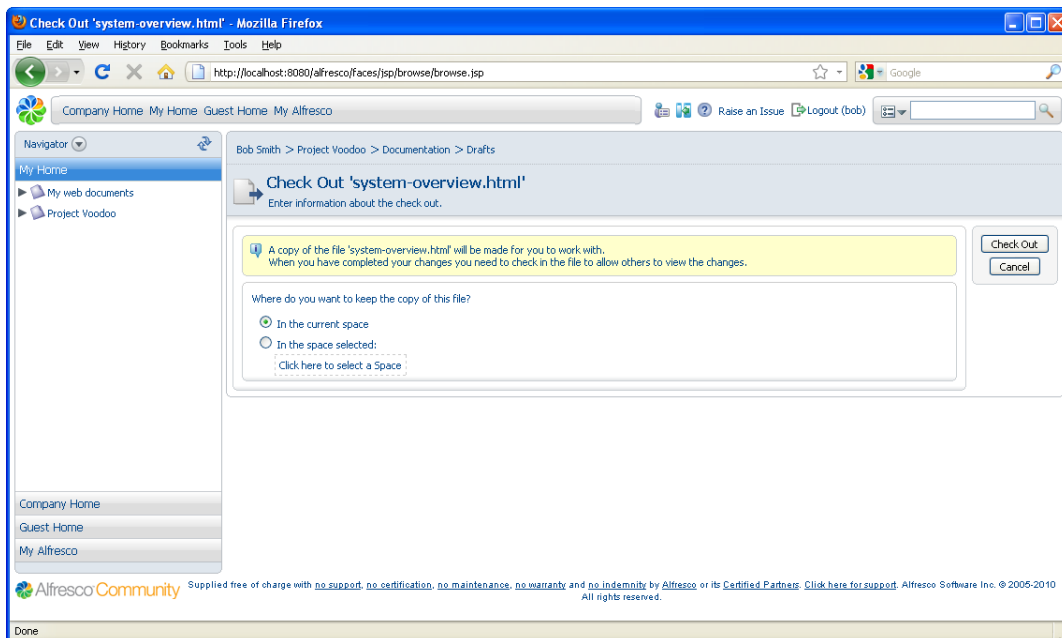
With multiple authors collaborating on the content, you want to ensure that only one person modifies it at a time by checking it out. This creates a working copy and locks the original. When you check it in, the updated item overwrites the original item with the working copy and unlocks it.

Checking out a content item

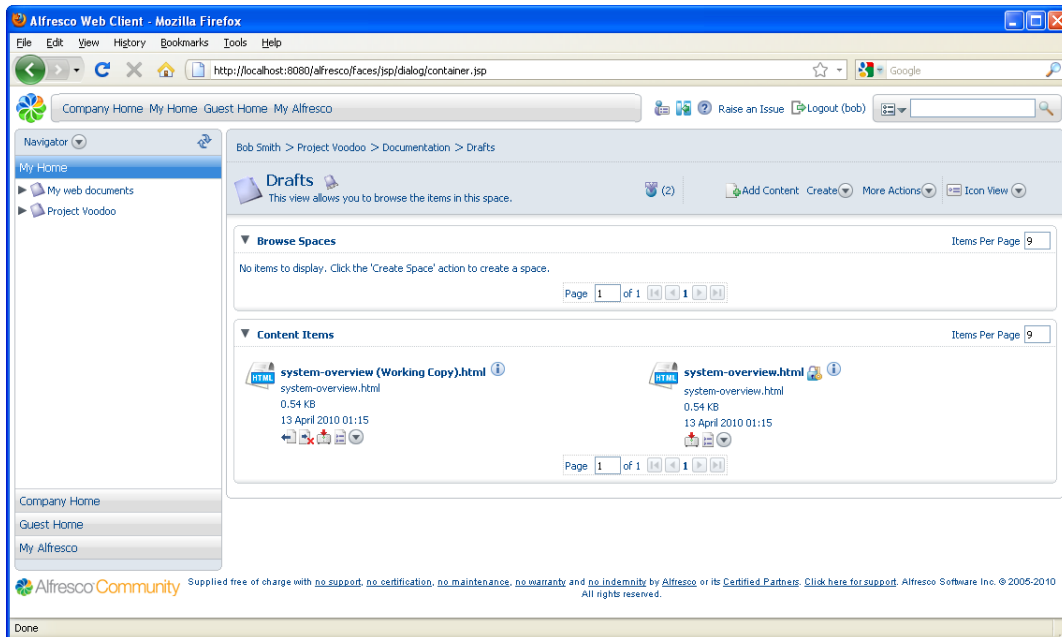
In this task, you will check out content from a space so that others cannot modify the file with which you are working.

1. In the **Drafts** space, click  and select **Check Out** for the document **system-overview.html**.

You are given the choice of checking out the working copy to the same space as the original or to any other space. Some people like to work with one space that contains all their current work-in-progress, so may have created a specific folder in their home space for working copies. You are going to keep the working copy in the current space.



2. Click **Check Out**.
3. Click the link **system-overview (Working Copy).html** and save the file to your computer.
4. Click **OK** to return to the space, which now contains two items. One is appended with **(Working Copy)**.



Checking in a content item

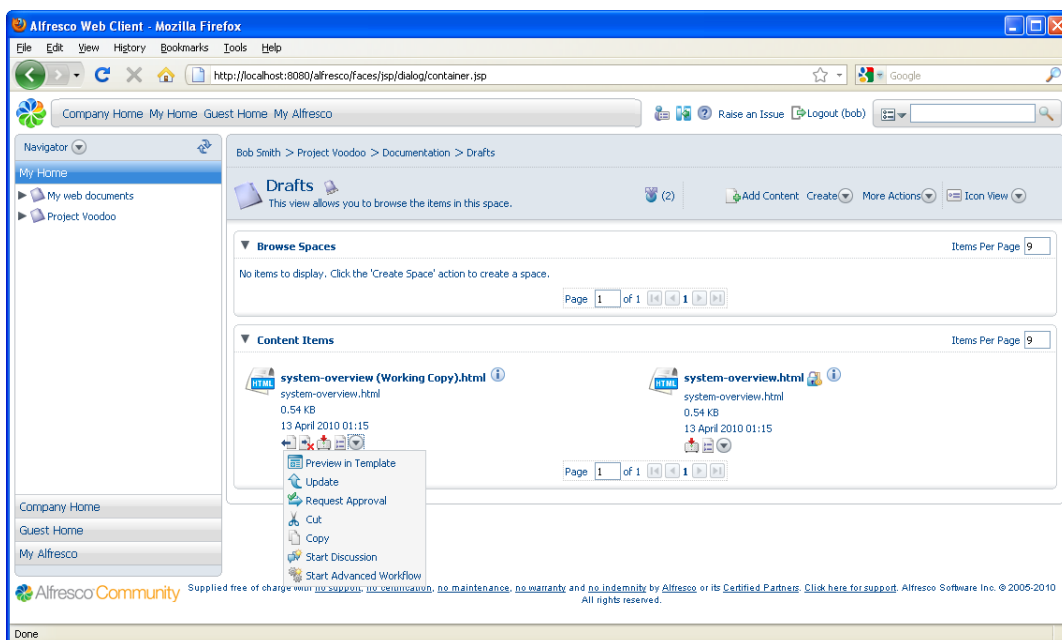
The **Lock** icon displayed beside the original content item lets you know that it cannot be modified. The only way you can modify it is to check in or undo the check out on the working copy. If you are not the person who checked out the document, hover the mouse over the lock icon on the original item to display the author who is currently editing the item.

In this task, you are going to edit the document and add some minor changes to the text. Once saved, you can check in the content.

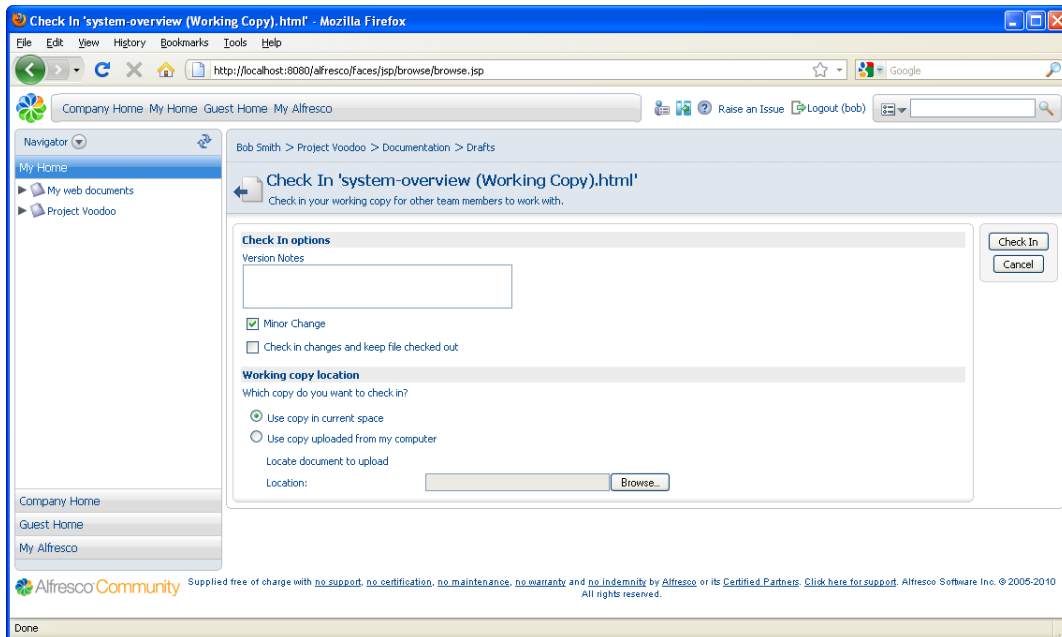
1. Open the Working Copy of the file on your computer and make changes to the content.



You can use the **Update** action for a content item to upload changes to the working copy without checking in the file but for the purpose of this tutorial, we want to check in the file.




2. Click  (**Check In**) associated with the content item.

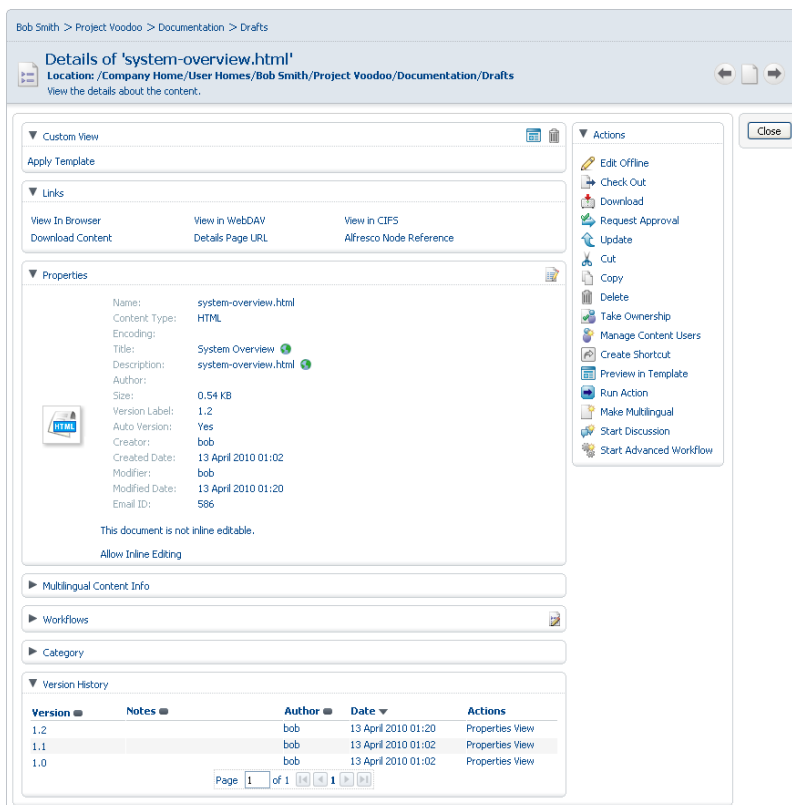


3. Indicate the revision as being a **Minor Change** and add notes, if desired.
4. Click **Check In**.

Version history


You can view the version history for content in a space. As the content is versioned, previous iterations are available in the version history.

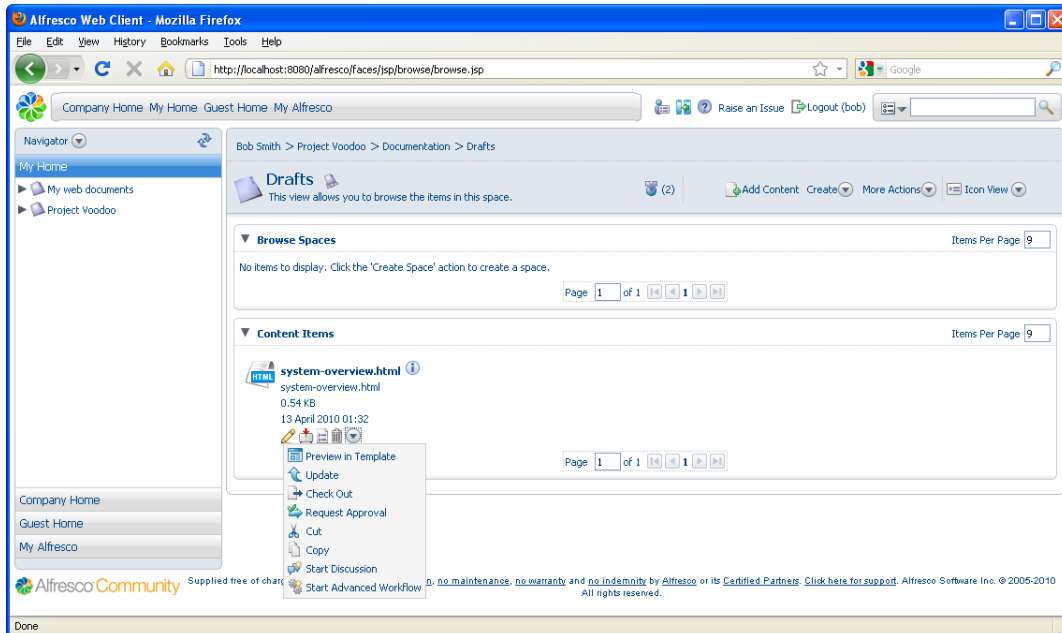
1. Click  (**View Details**) for the document **system-overview.html**.
2. On the **Details** page, expand the **Version History** pane. The current version is listed.



Sending content for review


When content has been completed, it can be sent for review. Any workflow steps that are available for an item of content are shown in its actions, either from the **More Actions** icon or from the **View Details** icon associated with the content item.

1. In the **Content Items** pane, click  for the item **system-overview.html** and select **Request Approval**.

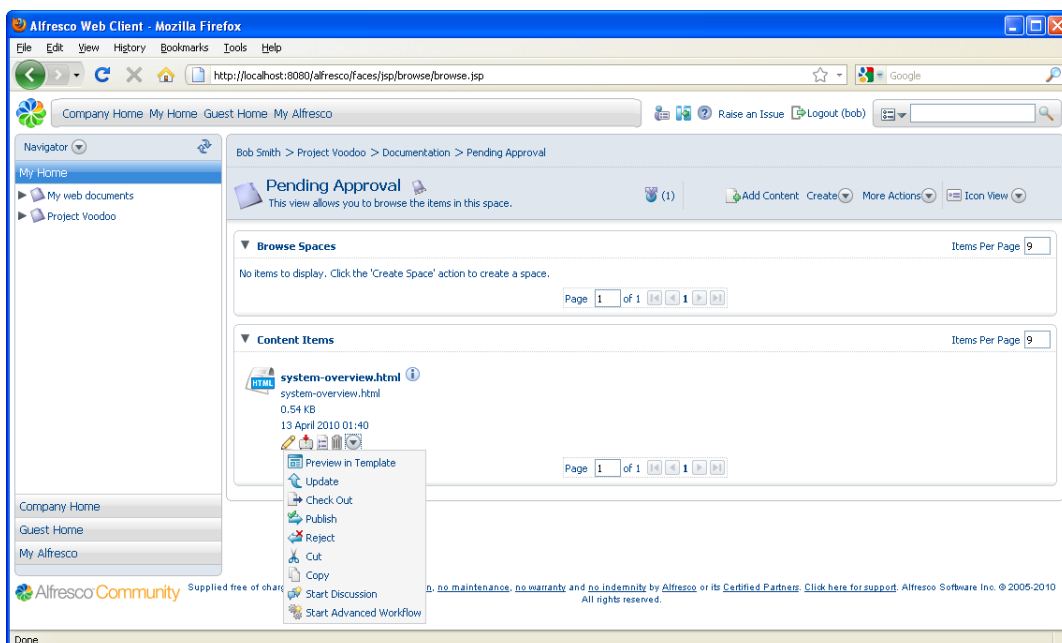


The content item moves to the **Pending Approval** space.

2. Navigate to the **Pending Approval** space where you can see the **system-overview.html** content item.

 Another rule could have been defined to send an email alert to the reviewers of this document.

3. Click  for this item to see the **Publish** and **Reject** workflow steps you created as a rule.



4. Click **Publish** to move the content to the **Published** space.

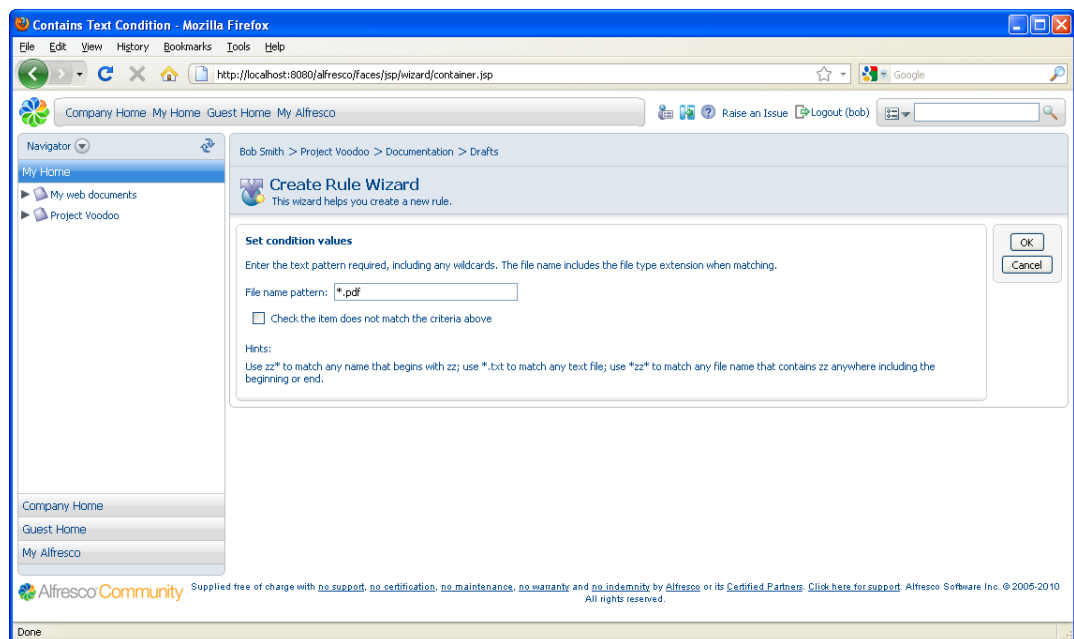
Alfresco also has integrated Business Process Management (BPM) capability. This goes beyond the Simple Workflow folder-based method of sending content for review, allowing content to remain where it is while complex workflows can operate on it. The BPM-based workflow creates tasks for users to complete, with these showing up in the user's **My Tasks To Do** Dashboard Component.

Uploading and transforming content

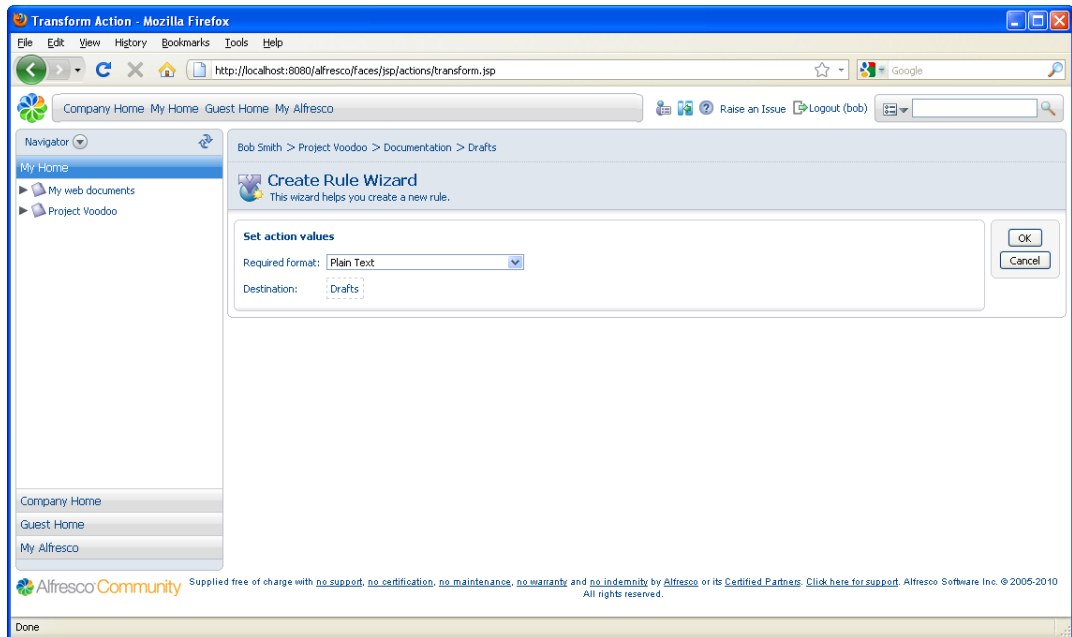
Define a transformation rule that converts content as it is uploaded to a space.

In the following scenario, you want to use some marketing content in a technical document. However, the marketing content is in PDF format only. To use the text, define a transformation rule that converts content to a different format.

1. Navigate to the **Drafts** space in Project Voodoo. From the **More Actions** menu, select **Manage Content Rules**.
2. Click **Create Rule**.
3. Complete Step One using the following information.
 - a. Select **Name contains value** as the **Condition**.
 - b. Type *.pdf as the condition value.



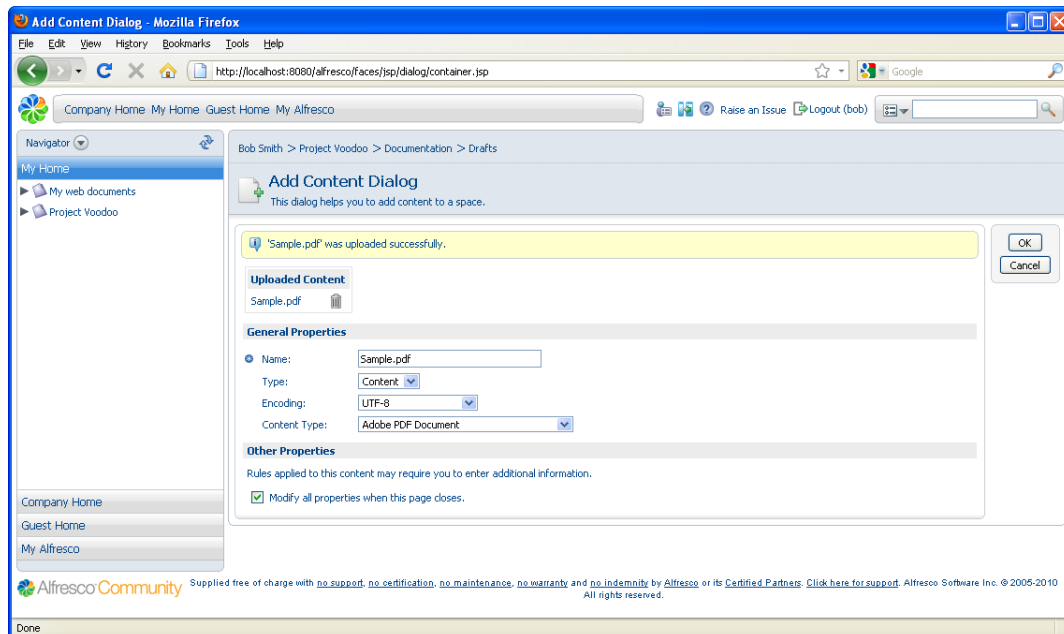
4. In Step Two, set the action as follows:
 - a. Select **Transform and copy content** as the **Action**.
 - b. Select **Plain Text** as the action value.
 - c. Select the **Drafts** space as the **Destination**.



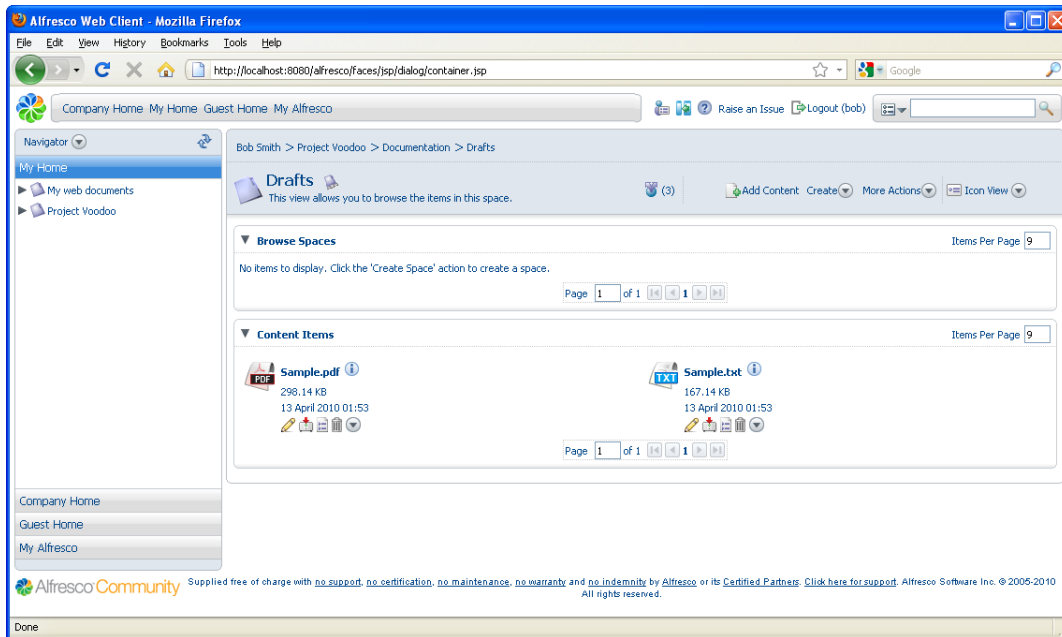
5. Enter the following details in Step Three:
 - a. Specify **Items are created or enter this folder** as the **Type**.
 - b. Type **Transform PDFs** as the **Title**.
6. Click **Finish** to complete the wizard.
7. Click **Close**.

Now you can upload a file to exercise the rule.

8. Click **Add Content** in the **Drafts** space header, then browse to and select any PDF file available on your computer.





9. When the message confirming the upload displays, uncheck **Modify all properties when this page closes** and click **OK**. The **Drafts** space now contains two new documents: the PDF file and the text version of it.

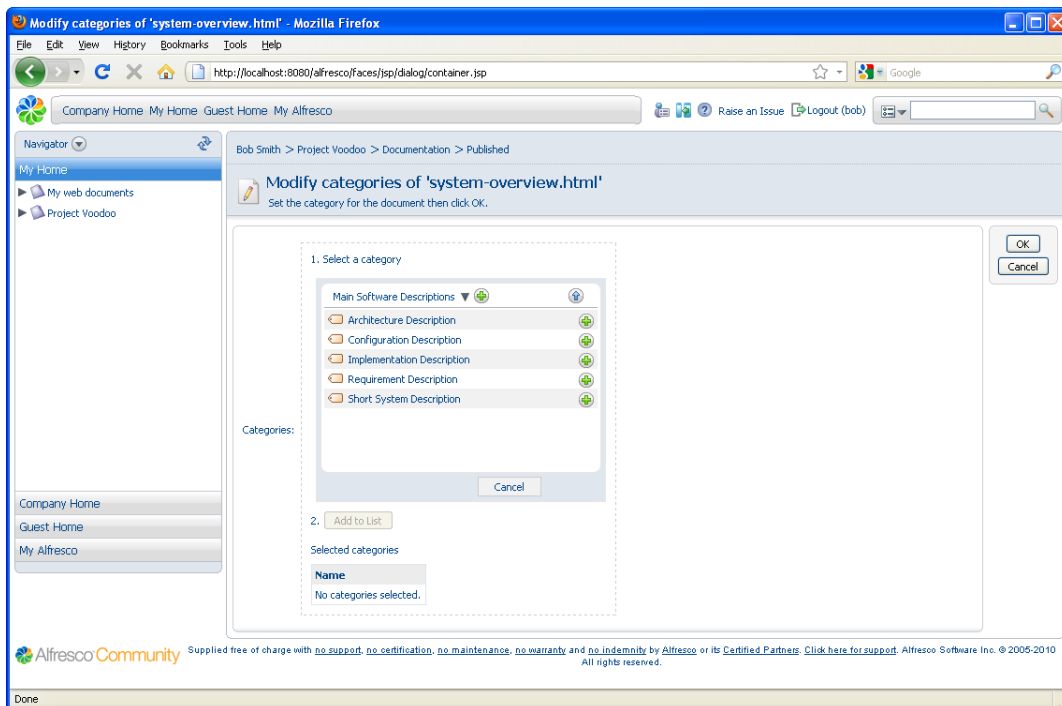


Categorizing content and advanced search

Another feature is the ability to assign categories to items. This allows information to be classified in any number of ways. With this, you can retrieve items that match combinations of constraints, including categories. Categories are hierarchical, so searching for an item in a category will also find anything classified below it. In the following example, you are going to add some content to a category and then search for it.

The first step is to allow the content to be categorized.

1. Navigate to the **Published** space and click  (**View Details**) for the document **system-overview.html**.
2. Expand the **Category** pane and click **Allow Categorization**.
3. Click  (**Change Category**) in the top right corner of this pane.
4. Click **Select** and then **Click here to select a Category**.
5. Click **Software Document Classification** to view its sub-categories.
6. Click through the following sub-categories:
 - Software Descriptions
 - Main Software Descriptions

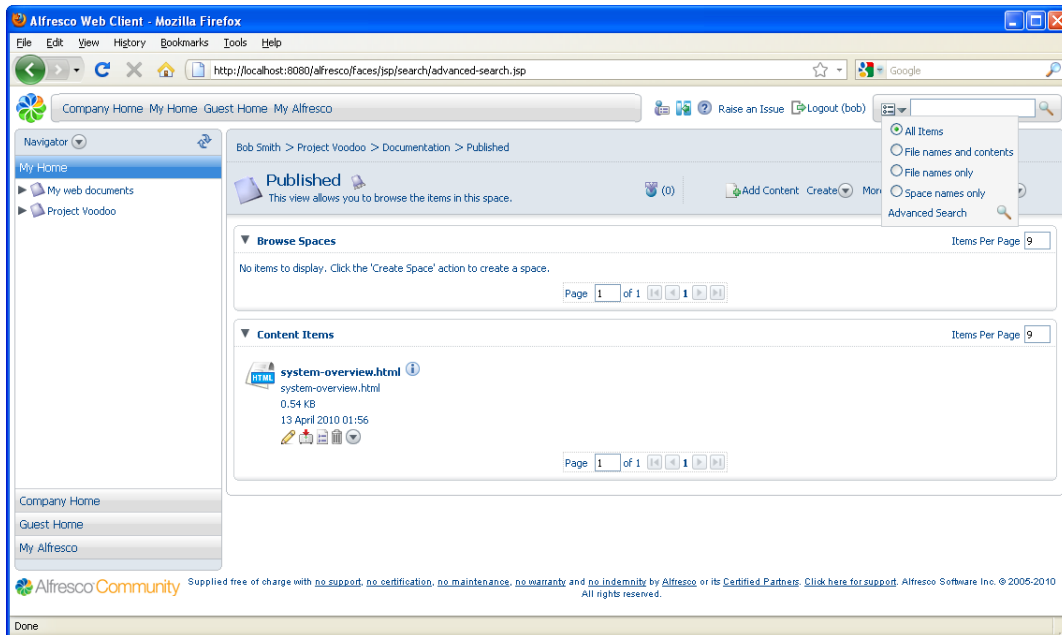


7. Select **Short System Description** and click **Add to List**.
8. Click **OK**.

Searching for categorized content

In this task you will use Advanced Search features to search for categorized content.

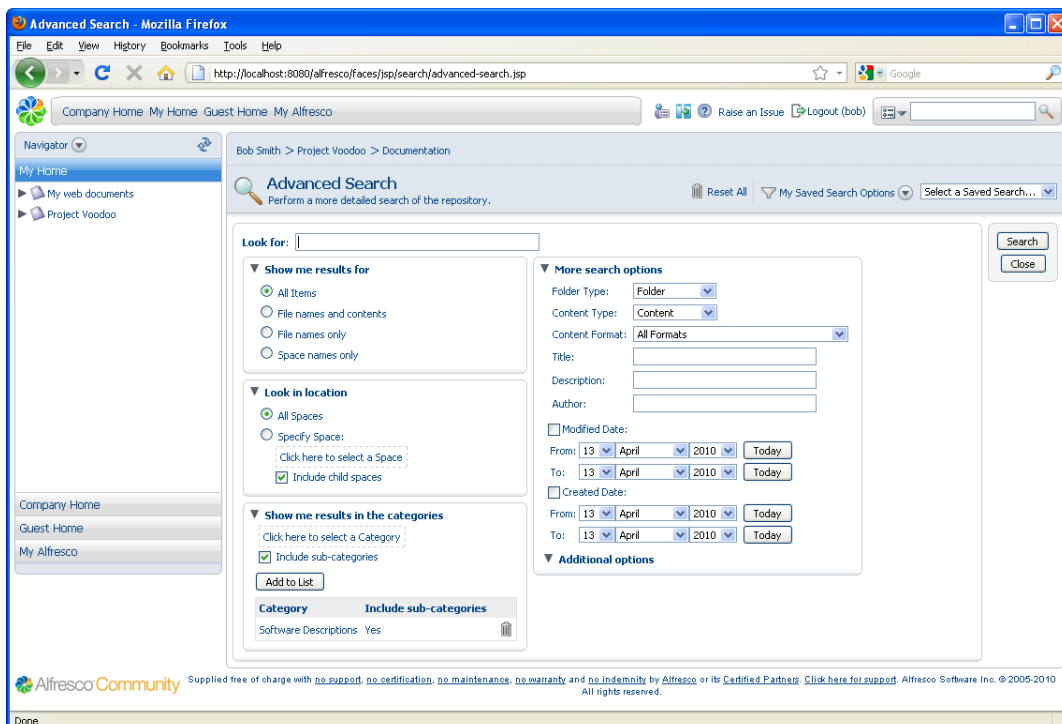
1. Click  (Options) in the toolbar.



2. Select **Advanced Search**.

The Advanced Search provides multiple criteria, including categories, under which you can search for a content item.

3. Expand the pane **Show me results in the categories** if it is not already visible.
4. Add **Software Descriptions** as the category, ensuring you check **Include sub-categories**.
5. Click **Add to List**.



6. Click **Search**. For this example, there is only one document that matches this criteria.



You can also include other options for the search, such as the kind of document you are looking for, or a range of dates for its creation or modification.

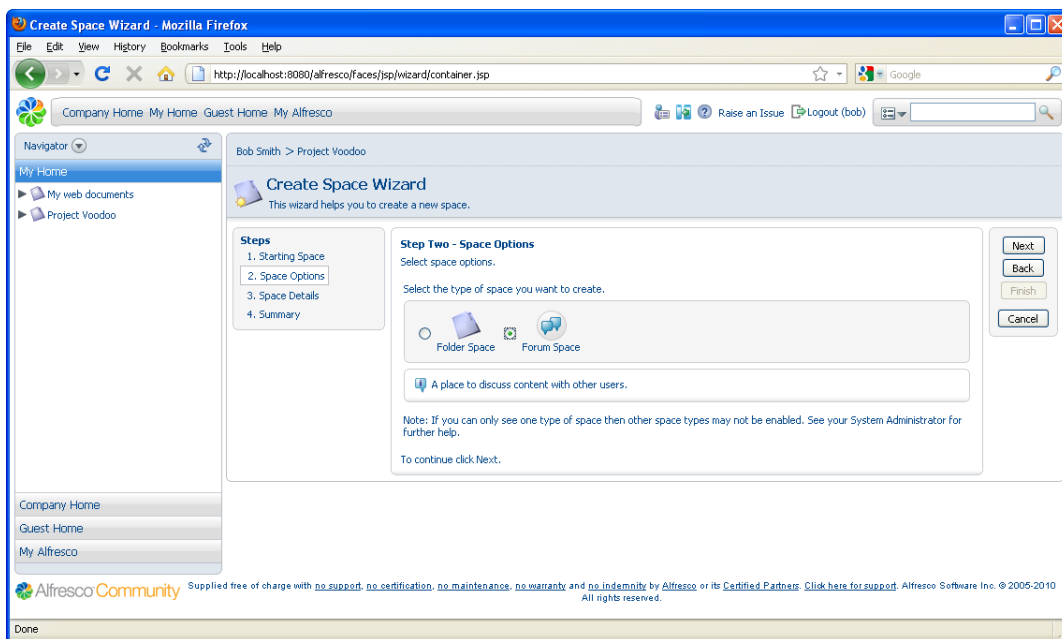
Forums and discussions

This application provides an easy way for people to collaborate using forums and discussions. Forums contain topics of discussion and topics contain posts from different users.

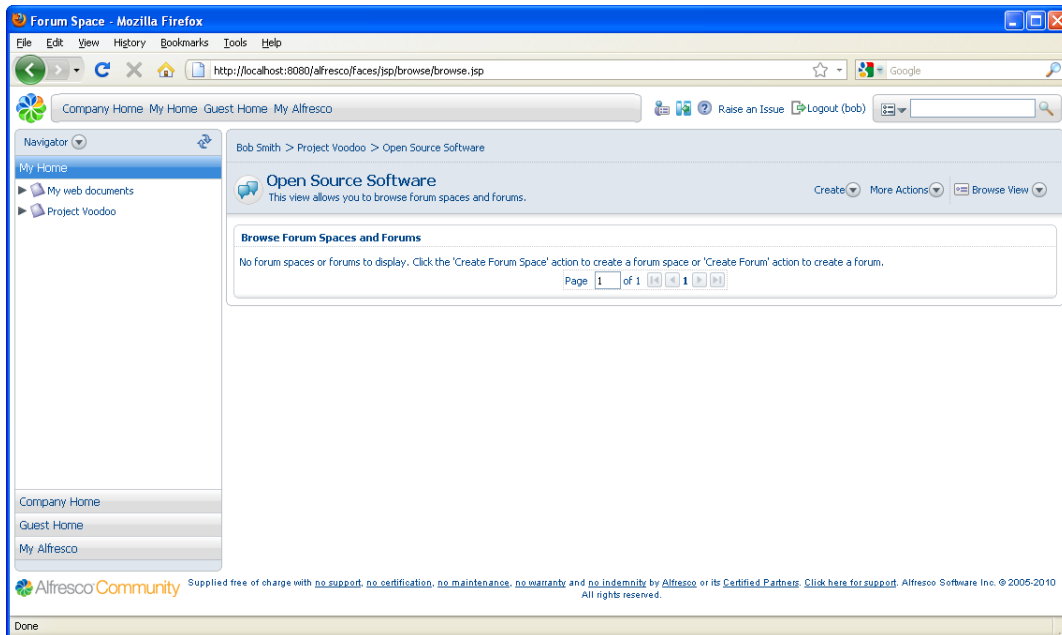
Creating a forum

A forum space allows people to collaborate using forums and discussions. A forum space can contain any number of forums, or even other forum spaces if wanted.

1. Navigate to the **Project Voodoo** space.
2. In the **Create** menu, click **Advanced Space Wizard**.
3. In Step One, select to create the space **From scratch** and click **Next**.
4. In Step Two, select **Forum Space**.

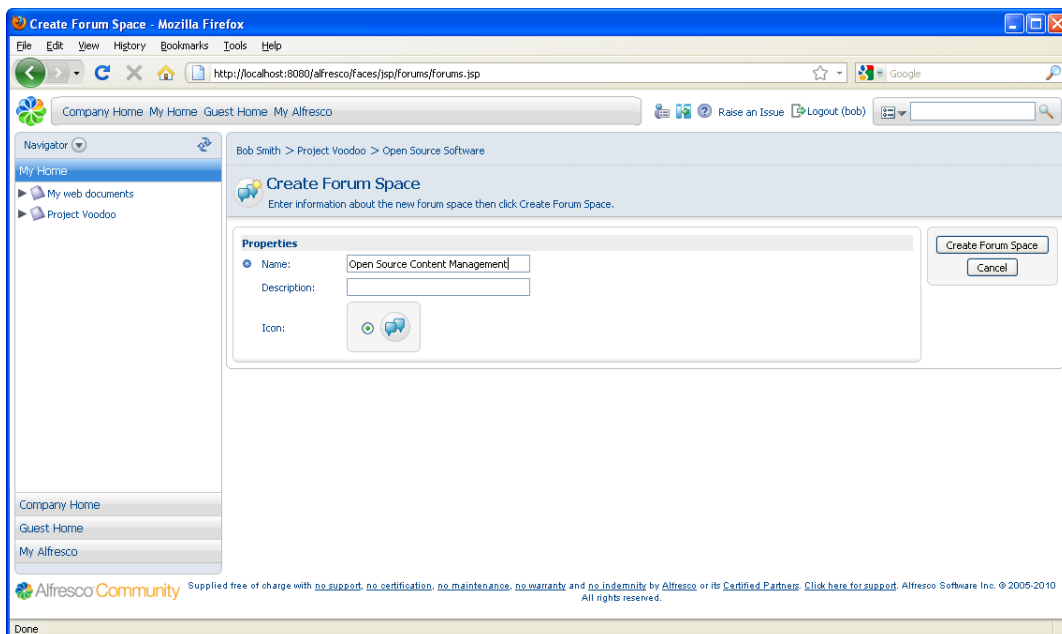


5. Click **Next**.
6. In Step Three, type **Open Source Software** as the **Name** and click **Finish**.
7. Open the **Open Source Software** space.

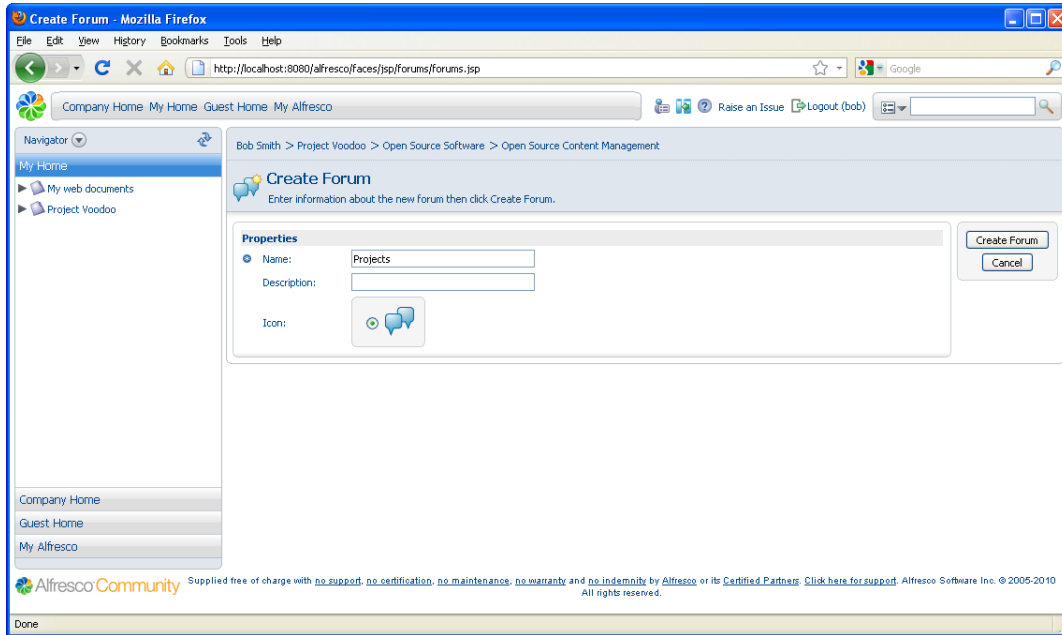


You will use a sub forum space to organize your forums.

8. In the **Create** menu, click **Create Forum Space**.
9. Type **Open Source Content Management** as the **Name**.



10. Click **Create Forum Space**.
11. Open the **Open Source Content Management** space.
12. In the **Create** menu, click **Create Forum** and name the forum **Projects**.

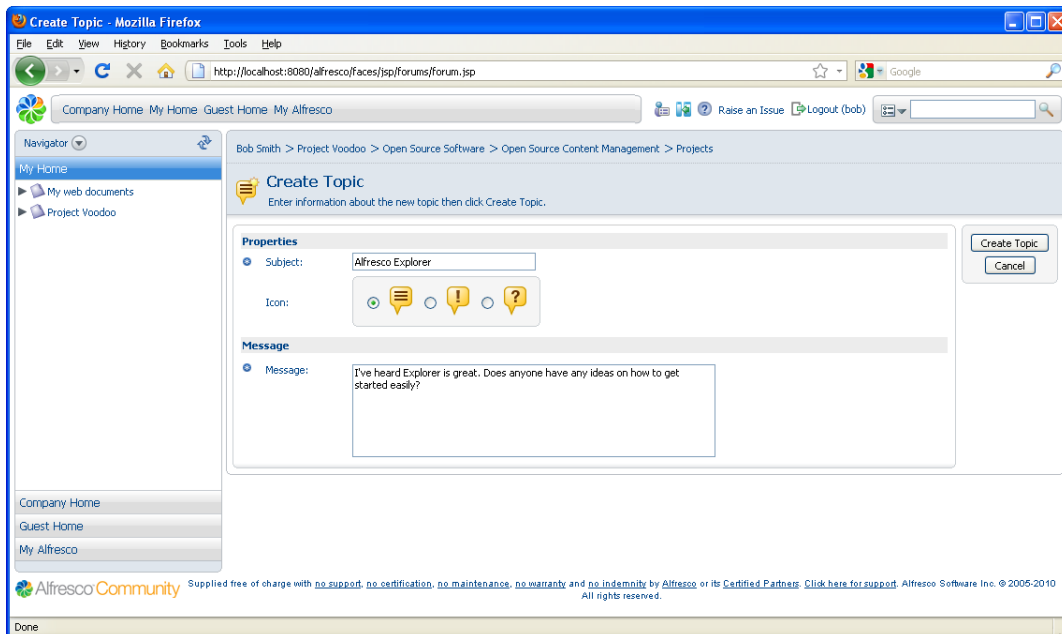


13. Click **Create Forum**.

Creating a topic

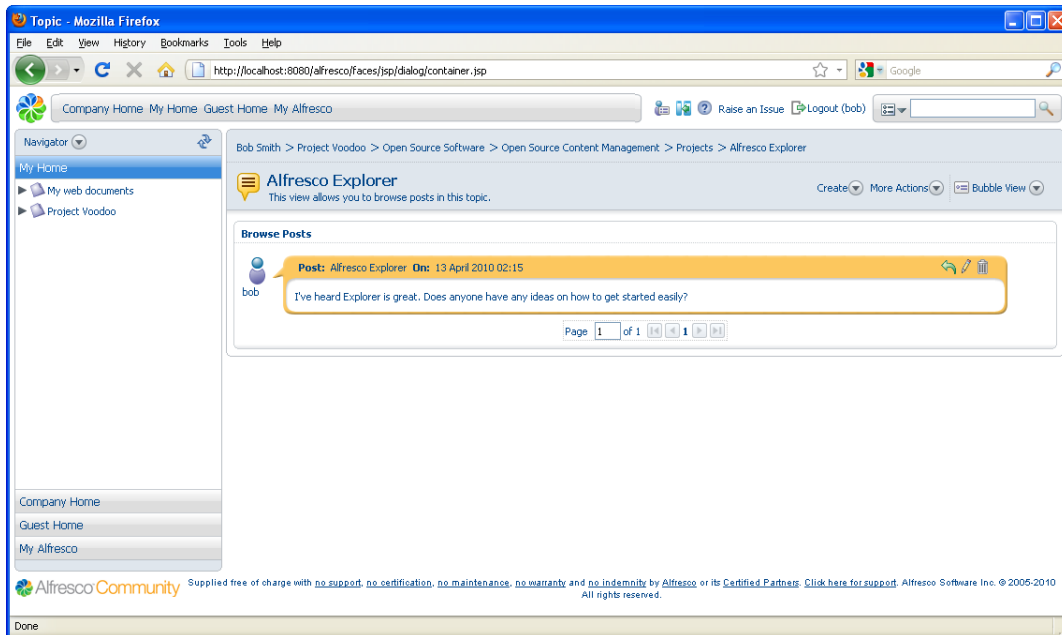
In this task, you will create a topic within a forum.


1. Navigate to and open the **Projects** forum.
2. In the **Create** menu, click **Create Topic**.
3. Enter the topic details in the **Subject** and **Message** boxes. You can select an icon to represent the type of message you are posting.

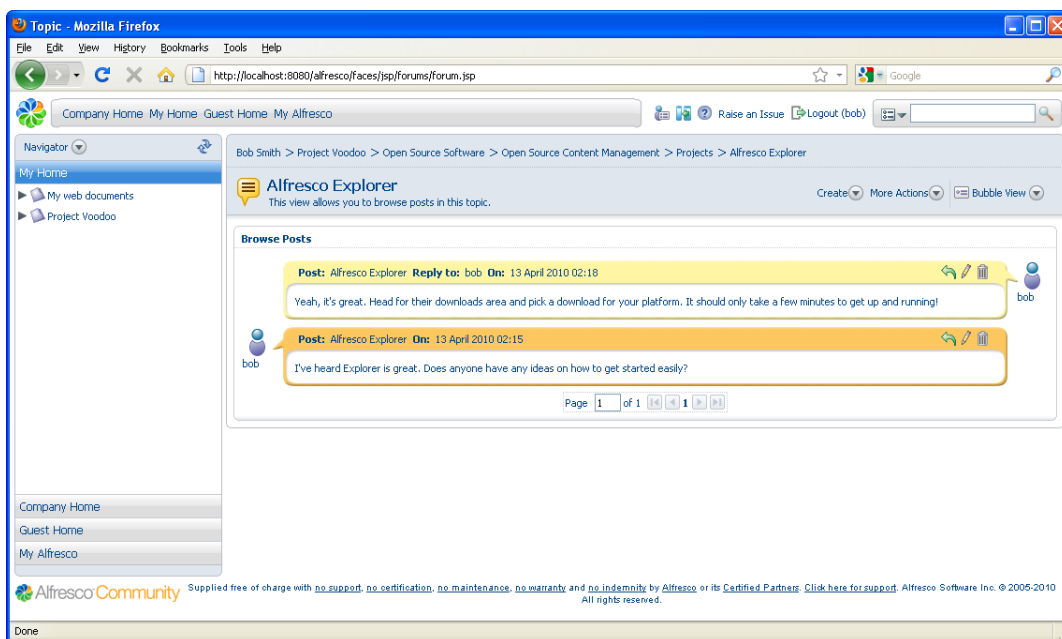


4. Click **Create Topic**.

Once a topic is created, it is always possible to edit and change it, or even delete it. The icons on a post determine what actions you are allowed to take.




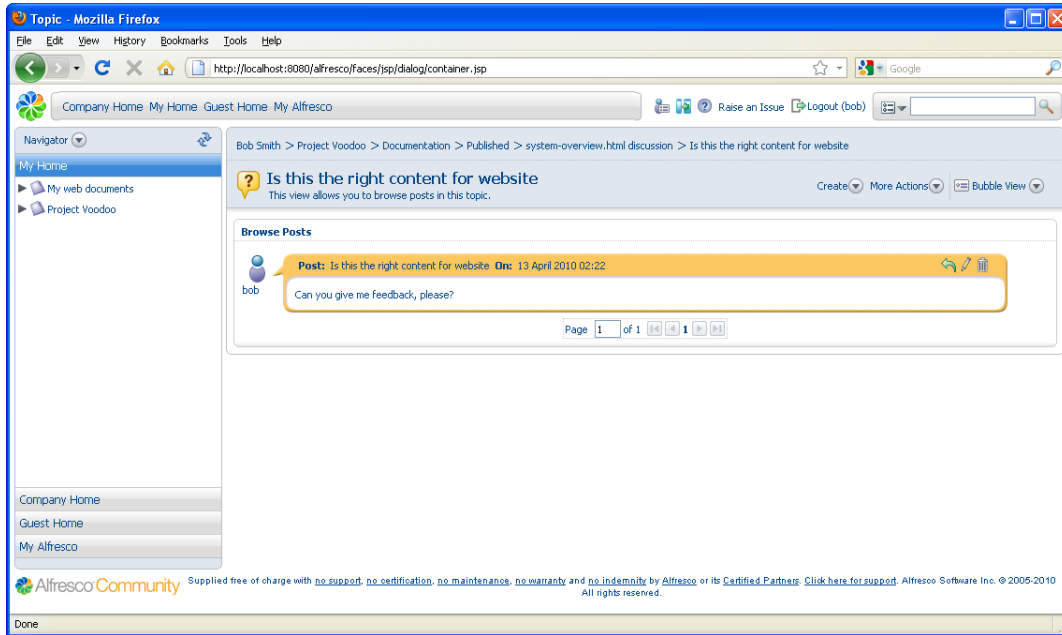
Any other user with the right permissions will be able to reply to the post (using the **Post Reply** icon: ). By default, the most recent post is at the top.



Discussions

Discussions are like a forum attached to a piece of content. Wherever the document is moved, the discussion goes with it. They provide an ideal way to record decisions or annotations about a document without changing the content.

1. Navigate to the content item **system-overview.html** (now located in the **Published** space).
2. In the **Content Items** pane, click  for this item and select **Start Discussion**.
3. On the **Create Topic** page, enter the discussion details and click **Create Topic**.



4. To view a discussion on an item, click  (**View Discussions**) associated with the content item.

If you check out a document that has a discussion, the working draft will not have that discussion. However, if you start a discussion on a working copy when it is checked in, the discussion is added to the original item with a date stamp. While content is checked out, the original content is locked but discussions can still continue on it.

Summary

You have now meandered around much of the Alfresco system, with a view to giving you some ideas about the approaches Alfresco takes to managing content. The functionality of the system is being expanded continuously, providing an ever growing list of Enterprise Content Management features.