



FRED - SIMPLE SMART AND SWIFT ECM

USER GUIDE TRIAL VERSION 3.3



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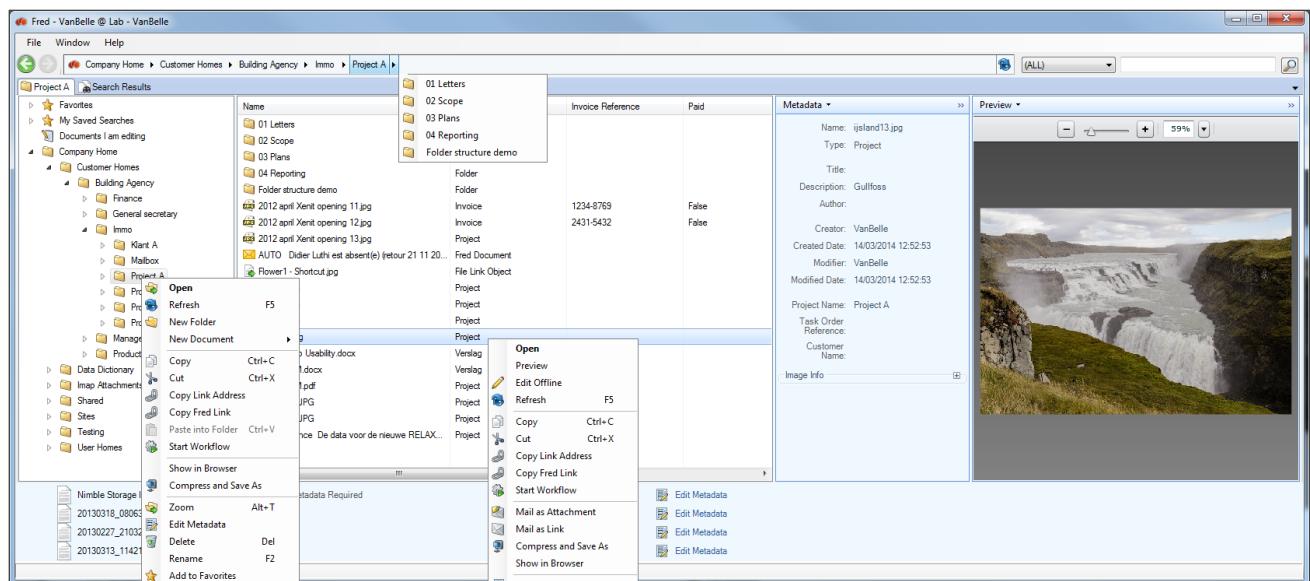
FRED USER GUIDE

1 ABOUT FRED

Fred is a desktop window to Alfresco. Fred is complementary to the Alfresco web interfaces and brings the central document repository closer to your desktop working environment.

Fred looks like explorer and acts like Alfresco. Making ECM intuitively and fast is the credo of Fred. The most commonly used document actions are now available in a working environment common to most of the users.

Through Fred you will be able to easily enter multiple documents into Alfresco or find back and open documents from Alfresco. As long as you have an internet connection, you will be able to use Fred and work the same way independently from your location.





2 WHAT IS NEW IN FRED 3.3

Following functionalities have been added or modified in this release:

Handling folders

- Create folder from template

Navigation

- My Sites: similar like My Favourites but for the Share Sites of which you are a member.

Alfresco 5.0 support

- Edit online of MS Office documents
- Enhanced previews with search in preview and
- Support of SOLR 4 – enhanced search capabilities



3 INSTALLATION REQUIREMENTS

Minimum requirement for installing Fred are:

- OS: Vista SP2, Win 7 SP1 or higher
- .NET Framework 4.5
- 90 Mb of available disk space: initial installation and first server

For Outlook 2003 integration: PIA 2003 - Primary Interop Assemblies

For Edit Online: min Office 2011

Convert To PDF: supported for MS Office 2007 or higher

Compare documents: supported for MS WORD 2007 or higher

Metadata auto completion: requires SOLR-based search on the Alfresco server

Facetted search: requires SOLR-based search on the Alfresco server



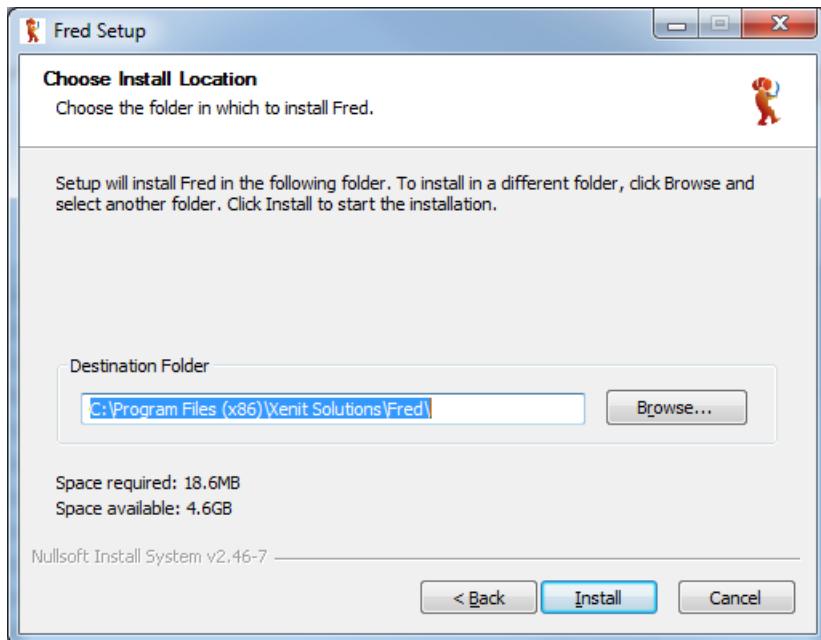
4 INSTALLATION INSTRUCTIONS

Contact your system administrator for more information about where you can download the Fred Set-up file.

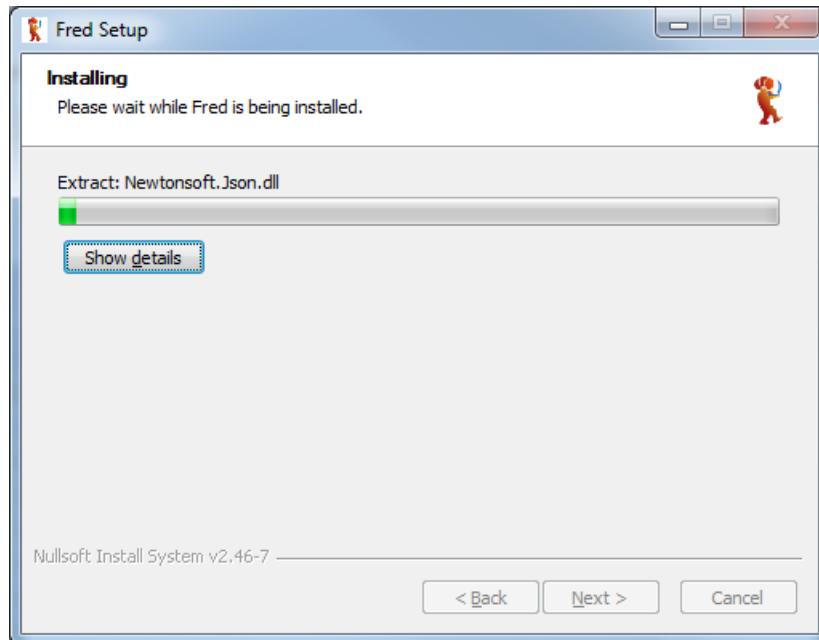
- Download the set-up file to your local disk.
- Open the folder where you downloaded the fred-trial-setup.exe file and double click it.



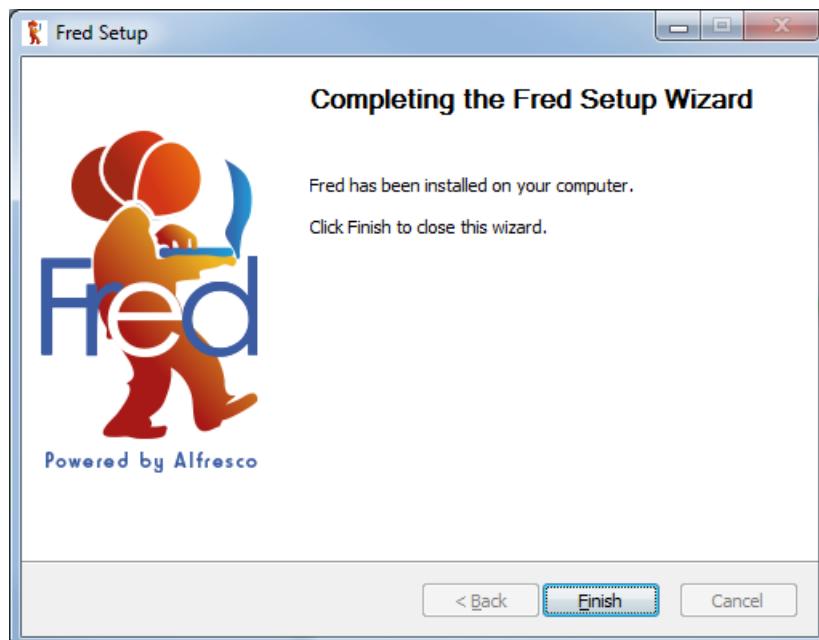
- Click on next.



- In case you do not want to use the standard setting, browse to the folder in which you want to install the Fred application. Click on “Install”.
- The application is now being installed.



- Click on "Next"



- Fred has been installed. Click on "Finish" to complete the installation process.

In the program menu tree, new commands are now available under the XeniT solutions folder:

- Fred: start the application
- Uninstall Fred: remove the application from your computer



Programs (16)

Fred

Documents (16104)

Fred
Fred
Fred
Fred

Pictures (2)

Fred network down
Fred upload problem

Files (25)

Fred User Guide Trial 2.3 (Working Copy)
Fred Administrator Guide 2.3 (Working Copy)
11_Fred-Astaire-9190991-1-402
Fred Logo 360

See more results

fred

The screenshot shows a search results window titled 'Programs (16)' with one result 'Fred' highlighted. Below it are sections for 'Documents (16104)', 'Pictures (2)', and 'Files (25)'. Under 'Documents', there are four entries all named 'Fred'. Under 'Pictures', there are two entries: 'Fred network down' and 'Fred upload problem'. Under 'Files', there are four entries: 'Fred User Guide Trial 2.3 (Working Copy)', 'Fred Administrator Guide 2.3 (Working Copy)', '11_Fred-Astaire-9190991-1-402', and 'Fred Logo 360'. At the bottom, there is a search bar with the text 'fred' and two buttons: 'Sleep' and '▶'.



5 HOW TO UPGRADE

New versions of Fred are released on a regular basis. Visit our website regularly to see if new versions are available. Download the new version from the Fred demo site.

Fred compares the compatibility of the front-end and back-end side and provides a message to the user in case of none compatibility.

Important remark: before starting the upgrade process, make sure you have closed the Fred program by using the Exit command on the Fred icon (right mouse click) menu or clicking the .

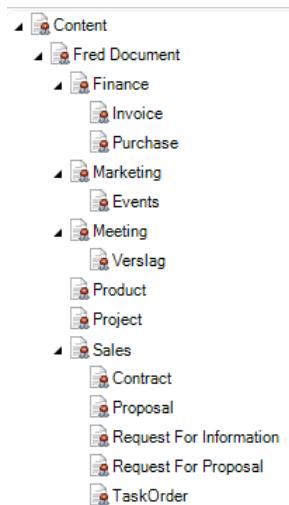


6 ABOUT DOCUMENT MODELS AND METADATA

In a modern Enterprise Content Management platform, files are enriched with metadata making it much easier to search, guide and retrieve information from the ECM platform. Metadata can be any kind of information (text, date, numeric, lists ...) that specifies the content or the status of the file. In Alfresco, metadata is organized in the following way:

- A number of document types, each having a particular combination of specific metadata fields, are defined. For example: offer, order, invoice, marketing document, contract ...
- Some metadata fields can appear in multiple document types, for example: customer name
- Metadata can be mandatory or optional, single value or multi value ...
- Drop down list can be used to provide predefined values for the metadata field
- Constraints can be defined on the format of the field values

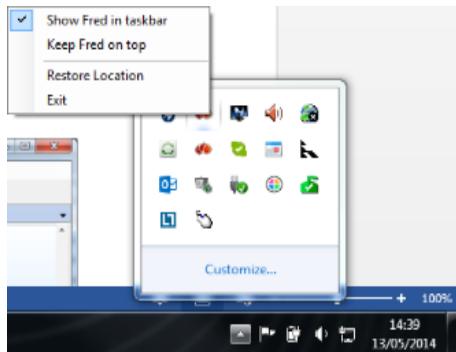
The Fred Trial environment provides a sample document model with a variation of document types and metadata field types and constraints. This trial document model will evolve over time to allow you to experience the capabilities of Fred.





7 GETTING STARTED

- Click on the XeniT Solutions/Fred command to start up Fred.
- The Fred icon  appears in the task bar and the Fred window is opened.
- Clicking on the Fred icon will open and close the Fred Window.



- A right mouse click on the Fred icon pops-up a menu where you can configure the appearance of the Fred application:
 - Show Fred in taskbar: presents a Fred tab in the Windows taskbar
 - Keep Fred on top: this will make the Fred window appear always on top of any application window you make active
 - Restore location: sets the Fred pane back in the bottom right corner
 - Exit: close the application

The Fred window can be resized, moved, minimized, maximized and closed. Closing the Fred application can be done with the Exit command on the Fred icon menu, the exit command in File/Quit and the  button.



8 CONNECTING TO ALFRESCO

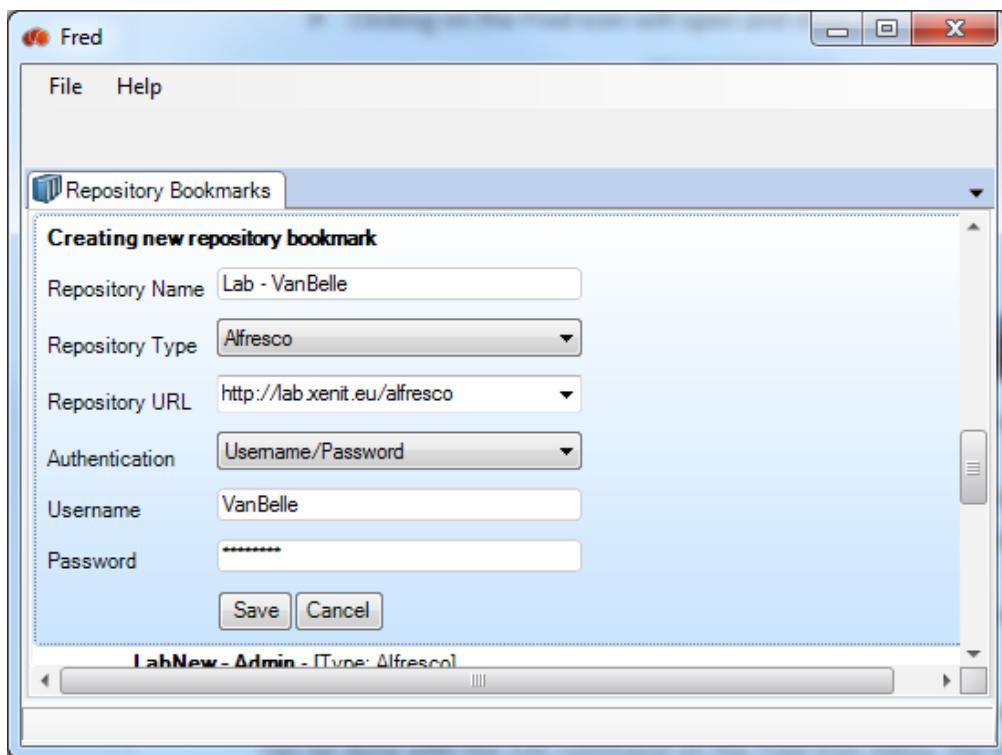
The Fred Trial Version has a default server configuration. This Fred Trial version cannot be configured for another Alfresco server. The user will have to set the username and password as provided by XeniT.

For the completeness of the documentation we are providing you the functional description hereafter.

Fred is a desktop window to a Alfresco Server. Fred presents the content of the Alfresco server. To be able to access the server, the user needs to configure the Alfresco repository to which the user wishes to connect.

The Fred start-up window contains a list of repositories which you have configured.

- To add a repository click on  at the bottom of the list.
- Fill in the fields of the repository you want to configure:
 - Repository name: any information to describe the repository.
 - Repository URL: the link to the Alfresco repository you want to connect. Contact your administrator to receive the link to your Alfresco repository
 - NTLM authentication: use Single Sign-on authentication in a corporate network
 - Username and password: in case there is no Single Sign-on available you need to fill in the username and password to authenticate yourself against the Alfresco server
- Click save.



Now this repository is presented in a list of all the repositories you have configured. You can connect to multiple repositories, using multiple account names.

The list of repositories you have configured is sorted alphabetically based on the repository name you have provided.



In the list of repositories you can indicate one repository which will be the default repository. When you start up Fred, it will open the default repository immediately. If no default repository is selected then Fred will open the repository list at start-up.

Open Bookmark

Connect Offline

Edit Bookmark

Delete Bookmark

- To enter a repository, you need to double click on a repository in the list.
- When you have entered an Alfresco repository and you want to move to another repository, click File/Disconnect
- Click on Edit Bookmark to modify the configuration settings of the bookmark
- Click on Delete Bookmark to remove a bookmark from the list
- Click on Connect Offline when you are not connected to the internet and you want to navigate the part of your repository that is in the local cache.



9 ALFRESCO ACCESS CONTROL

Fred does not create any additional layer on the Alfresco access control functionality. Fred is fully transparent with regards to the access control implemented in Alfresco. Any access rights provided to a user or a group on a folder or a file will be applicable in the Fred application. This means that:

- you will be able to find and see folders and files for which you have at minimum reading rights
- you will be able to create folders when you have collaborator rights or higher
- action commands for which you have permission will be enabled
- etc.



10 BROWSING THE REPOSITORY

When you have logged in to a specific repository, you will be able to see all folders and files for which you have the appropriate rights.

Name	Info	Invoice Reference	Paid	Metadata
01 Letters	Folder			Name: ijssel13.jpg Type: Project
02 Scops	Folder			Title:
03 Plans	Folder			Description: Gullfoss
04 Reporting	Folder			Author:
Folder structure demo	Folder			Creator: VanBelle
2012 april Xent opening 11.jpg	Invoice	1234-5769	False	Created Date: 14/03/2014 12:52:53
2012 april Xent opening 12.jpg	Invoice	2431-5432	False	Modifier: VanBelle
2012 april Xent opening 13.jpg	Project			Modified Date: 14/03/2014 12:52:53
AUTO Dider Luth est absent(e) retour 21 11 20...	Fred Document			Project Name: Project.A
Flower1 - Shortcut.jpg	File Link Object			Task Order Reference:
Flower2.jpg	Project			Customer Name:
Flower3.jpg	Project			Image Info
Flower4.jpg	Project			
Flower5.jpg	Project			
Flower6.jpg	Project			
plan13.jpg	Project			
MOM Demo Usability.docx	Venlig			
MOM NBIM.docx	Venlig			
MOM NBIM.pdf	Project			
P1050607.JPG	Project			
P1050629.JPG	Project			
Prana Balance De data voor de nieuwe RELAX...	Project			

The browser tab has following elements:

- Address bar indicating which folder is the active folder.
- Navigation pane presenting the folder structure in the repository
- Details pane, showing the underlying folders and the files in the selected folder. Columns are showing additional details on the content.
- Metadata pane showing the metadata linked to the selected file or folder in the detail pane
- Preview pane showing a preview of the file selected in the detail pane
- Search box

The behaviour in the Address bar and the Navigation and Detail pane is very similar to the behaviour in Explorer. You can navigate selecting folders in the Address bar, clicking folders in the navigation pane or double clicking folders in the details pane.

10.1 NAVIGATING THE FOLDER STRUCTURE

Clicking on ▶ or ▲ symbol will expand resp. collapse folders in the navigation pane.

Clicking on a folder in the navigation pane or double clicking the folder in the details pane or selecting “Open” will set that folder as your workspace. The path of the selected folder will show up in the Address bar.

The name of the Browser tab is updated to the name of the selected folder.

Setting a folder as your workspace allows you to work continuously in the selected folder without having to click through the tree structure. Closing the Fred application, will not change the work space folder when you open Fred again.

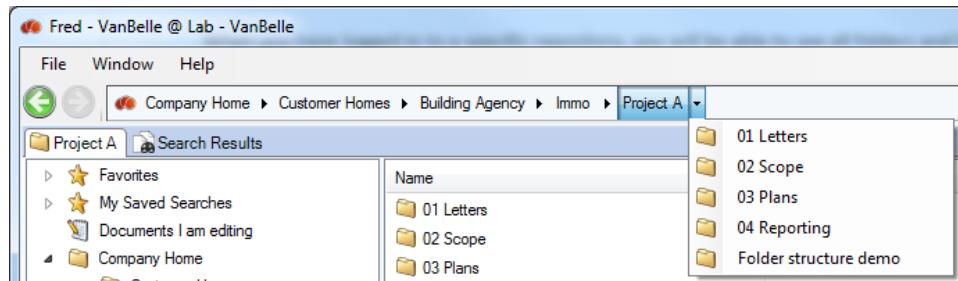
Search actions are restricted to your current active workspace.



10.2 USING THE ADDRESS BAR

Clicking on any folder in the Address bar at the top will set the selected folder as working space.

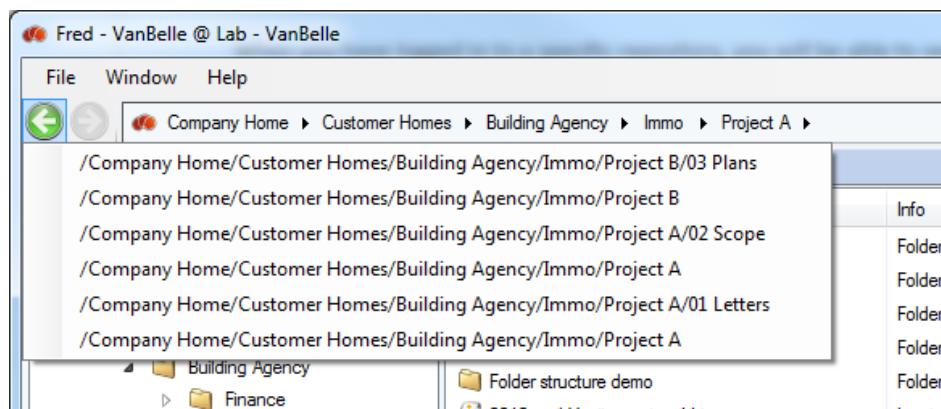
You can use the drop down lists at any place in the path to move to another subfolder in the tree.



10.3 BACK AND FORWARD AND NAVIGATION HISTORY

You can use the back and forward buttons, similar to a Windows interface, to browse between previously viewed files and/or folders.

A right mouse click provides a drop down list of previously visited folders.



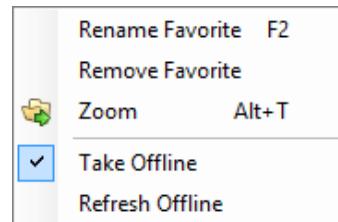
10.4 FAVOURITES

It is possible to add a folder to your Favourites in Fred. You can do this by right clicking on a file/folder, which you want to mark as Favourite, and selecting the “Add to Favourites”. You can also drag and drop a file or folder into the Favourites list.

You can easily rename the folders in the Favourites list by following actions:

- Right click the “Favourite” folder you want to rename and click “Rename Favourite”
- Alternatively, you can also use the F2 button on your keyboard to perform this action
- Or simply click once on the folder name which is highlighted.

Right clicking a Favourite folder provides you the following options:



- Renaming the Favourites will not change the name of the original folder.
- You can remove objects from the Favourites list.
- You can “Zoom” into the folder
- You can Take Offline the content in your Favourite folder
- Refresh the content and metadata that is already Offline

Name	Info	Author	O..	Creator
Mailbox	Folder			admin
MOM	Folder			admin
2012 april Xenit openin...	Fred Document	Michiel Grol		VanBelle
20130706_111216.jpg	Fred Document			admin
Alfresco Summit Custo...	Fred Document	Doug Dennerline		VanBelle
Grieken.txt	Fred Document			VanBelle
Het vergeten aspect v...	Fred Document	Sabine van Meenen - Ond...		VanBelle
MOM Ethias docx	Verslag	Peter Morel		VanBelle
Preview Email.png	Fred Document			VanBelle
Trafigura Fred Require...	Fred Document	Peter Morel		VanBelle
Weekly Email Blast-201...	Fred Document	Robert Marshall		VanBelle

1 document/folder deleted successfully

When adding folders to your Favourites, you will be able to navigate in the subfolders of the favourite folders.

You are able to drag & drop documents onto your Favourite folder structure. These documents will be uploaded into the appropriate folder.

Note that the bread crumb at the top will change from the Favourites to the full path indication if you move deeper into the folder structure.

Name	Info
Mailbox	Folder
MOM	Folder
2012 april Xenit openin...	Fred Document
20130706_111216.jpg	Fred Document

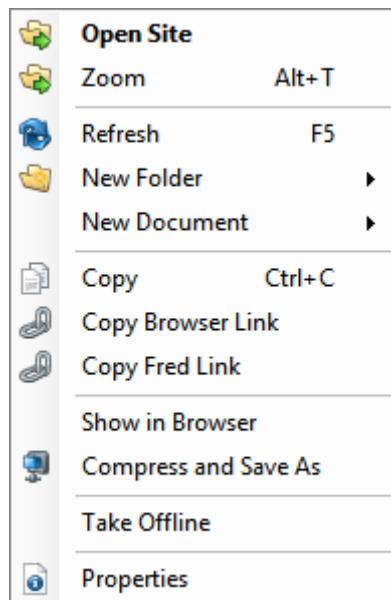


You can start a search query from the Favourite folders. You can launch this from the quick search in the navigation tab or you can select Favourites in the Location field of the Search tab. See also Search

10.5 MY SITES (NEW)

When you are member of a Share site, automatically the document library of that share site will appear under 'My Sites'. The document library folder will be presented as a folder with the name of the Share Site. To get the document library to appear under the 'My Sites', you need to be a member of the Share Site. Public or Moderated Share Site will not appear under the 'My Sites' if you are not a member.

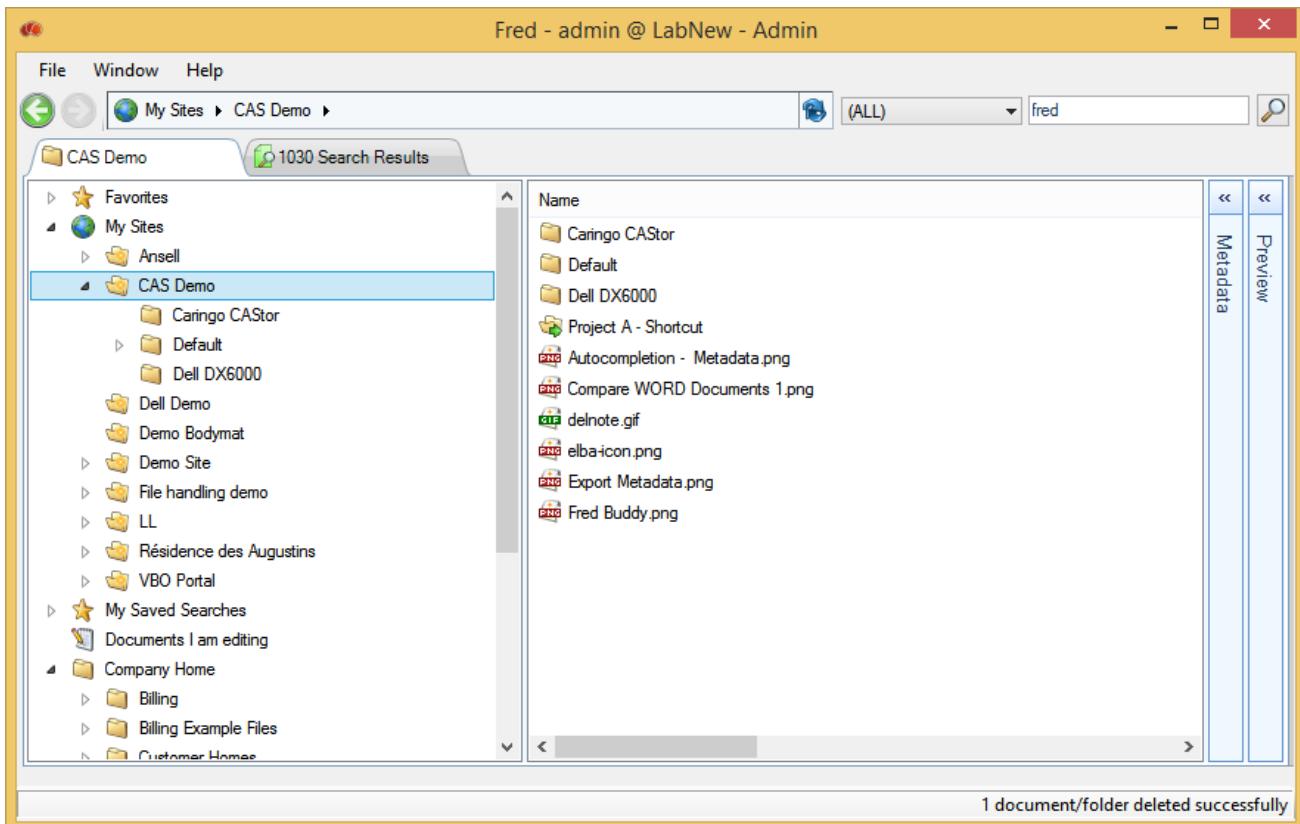
Right clicking a My Sites folder provides you the following options:



- Open Site will show the details of the folder



- You can “Zoom” into the folder
- Refresh the content and metadata
- New Folder: create a new folder from a folder template
- New Document: create a new document from a template
- Copy, Copy Browser Link and Copy Fred link will copy the content or the link to a Browser or the Fred application onto the Clipboard
- Show in Browser: this will bring you to the document Library of the Share Site in your default web browser
- Compress and Save will compress the content of the Library and place it onto your desktop
- You can Take Offline the content of the folder. Then this folder will appear also in the Favourites folder (see take off-line)



You will be able to navigate in the subfolders of the My Sites folders.

You are able to drag & drop documents onto your My Sites folder structure. These documents will be uploaded into the appropriate folder.

Note that the bread crumb at the top will change from the My Sites to the full path indication if you move deeper into the folder structure.



The top screenshot shows a search result for 'Ansell' in the 'My Sites' folder. The results list includes 'Industrial GBU', 'Medical GBU', 'New Verticals GBU', 'Sexual Health & Well Being GBU', 'Ansell Encore STYLE 85_NL_HR.pdf', and 'Ansell_Brand_Portal_Getting_Started-1.pdf'. The bottom screenshot shows a search result for 'Industrial GBU' in the 'Company Home > sites > ansell > documentLibrary'. The results list includes several image files: '46-100_Barbed_Wire_Handler_palm.jpg', '46-100_Barbed_Wire_Handler_top.jpg', '46-108_HDC_top(2).jpg', '46-108_HDC_top.jpg', '46-200_Fuel_Handler_Glove_top(2).jpg', and '46-200_Fuel_Handler_Glove_top.jpg'.

You can start a search query from the My Sites folders. You can launch this from the quick search in the navigation tab or you can select My Sites in the Location field of the Search tab. See also Search

This screenshot shows the 'Search' tab with the 'Location' dropdown open. The dropdown menu lists 'My Sites', 'Company Home', 'Favorites', and 'My Sites' again, with the second 'My Sites' option highlighted. Below the dropdown, the search results for 'My Sites' show three messages: 'enkel bij 2Compute (Commercieel informatie - 9710)-20100517-092622.msg', 'Slim en de wapenindustrie in het Midden-Oosten-20110125-095023.msg', and '5voor13' zoekt creatief talent!-20130831-211004.msg'.

10.6 MY SAVED SEARCHES

This folder provides you a list of all search queries you have saved. Clicking on a search will execute that search again and present the result in the Search tab.



Name	Info	Invoice Ref
Mailbox - Shortcut	Folder Link Object	
20130708_073139.jpg	Fred Document	
20130708_073230.jpg	Fred Document	
Aanbiedingen voor tablets vanaf 62 euro-201308...	Fred Document	
Bawfall120419.docx	Content	
ContractsImage_Contract_eng.pdf	Contract	
ContractsImage_Contract_eng_4.pdf	Fred Document	
delightful-flower.jpg	Fred Document	
Demo AVA.docx	Verslag	
Demo ECM Curalia.docx	Content	
LettersImage_Letter_eng.pdf	Fred Document	
Make Your Business Applications a Competitive ...	Fred Document	
MOM Demo Geritt.docx	Verslag	
MOM Demo Geritt.pdf	Fred Document	
MOM The City.docx	Verslag	
New pBooks TechEd specials and up to half off...	Fred Document	
OCMW Xlaas.docx	Verslag	
RosterRvConferenceAndStatus.pdf	Fred Document	

10.7 DOCUMENTS I AM EDITING

Clicking the 'Documents I am editing' provides in the details pane a list of all the working copies in the repository of documents that you have put in Edit Off-Line mode.

Name	Info	Location	Remote modified	Local modified
Contract Mijn vriend (Working Copy).doc	Contract	/Company Home/Customer...	9/02/2014 22:32:21	29/05/2013 21:4
Demo Customer Meeting (Working Copy).pdf	Content	/Company Home/Customer...	13/05/2014 15:04:42	13/05/2014 15:0
Product Launch A (Working Copy).pdf	Content	/Company Home/Customer...	6/05/2014 12:01:47	6/05/2014 12:01

The overview provides you information on:

- An icon indicating the status of the local copy
- The modification date of the local and server copy
- A message on the status of the local copy

Using the right mouse commands you will be able to:

- Open the document
 - In case the working copy is already on your PC, it will open the local copy
 - In case the local copy is missing, it will download the working copy from the server
- Check-in the document at which Fred will take the most recent version of the working copy and check it in.
 - The upload progress of the document will be shown in the upload list



- In case the document is versionable, the user will get a request to specify the new version.
- Discard the changes at which the working copy will be removed and the original document will be unlocked.
- Open the folder in which the file is located.

10.8 HIDING FOLDERS IN THE NAVIGATION

It is possible to hide folders like Data Dictionary and IMAP Attachments in the Fred user interface. These configuration settings are done on the Alfresco Server and have following consequences:

- The folder does not show up in the navigation pane while browsing through the folder structure
- The folder is not shown in the list of objects in the details pane
- The folder will show up in the search tab when you look for it
- You can add the folder as a Favorite or as a shortcut in another folder. This enables you to navigate to the folder in case you need to reach it.

The screenshot shows the Fred user interface with a yellow header bar. The title is "Fred Dev - VanBelle @ Lab - VanBelle". The menu bar includes "File", "Window", "Developer", and "Help". The toolbar has icons for back, forward, search, and refresh. The address bar shows the path: "Company Home > Customer Homes > Building Agency > General secretary >". Below the address bar is a search bar with the text "(ALL)" and a search icon. The main area has two panes. On the left is a tree view of the folder structure under "General secretary". The "Customer Homes" node is expanded, showing "Building Agency" which is also expanded, revealing "General secretary". Other nodes include "Favorites", "My Saved Searches", "Documents I am editing", "Company Home" (which is collapsed), "Billing", "Billing Example Files", "Customer Homes" (which is collapsed), "Finance", "Immo", "Management", "Products", "stas", "Flint Valley BBQs", "IWT test scenario", "Shared", "Sites", "Testing", and "User Homes". On the right is a table titled "Search Results" with 17 rows. The columns are "Name", "Info", "Author", "Owner", and "Creator". The data includes various files and documents such as "Images", "Mailbox", "MOM", "2012 april Xenit openin...", "20130706_111216.jpg", "Alfresco Summit Custo...", "Demo Etterbek.csv", "Grieken.txt", "Het vergeten aspect v...", "LIDMAATSCHAP UNI...", "MOM Ethias.docx", "MOM Switzerland.docx", "Preview configuration.p...", "Preview Email.png", "Trafigura Fred Require...", "vCloud Air and Busines...", and "Weekly Email Blast-201...". The "Creator" column consistently lists "VanBelle", except for a few entries like "admin" and "Peter Morel".

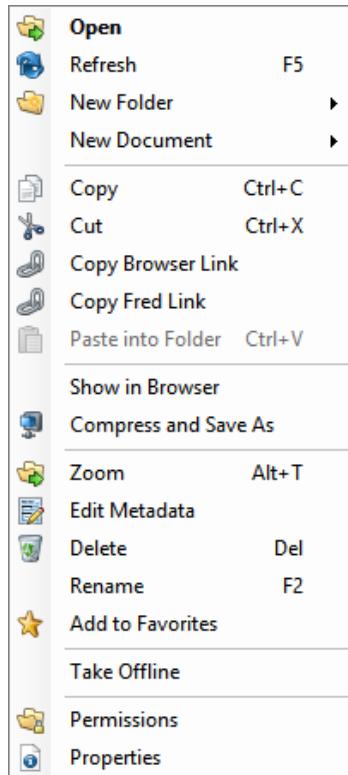
10.9 OPENING MULTIPLE BROWSER TABS

One can open multiple browser tabs clicking the Window/New Browser Tab command or using the short Ctrl + T. Each browser tab provides a view on the repository. Each tab will have the name of the active folder.



11 HANDLING FOLDERS

Right clicking on a folder in the navigation pane or the white space in the details pane pops-up a command menu enabling you to manage the folder structure.



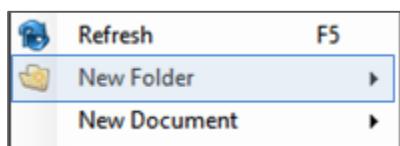
If you do not have the appropriate rights to execute one of these commands, this command will be disabled.

11.1 REFRESH

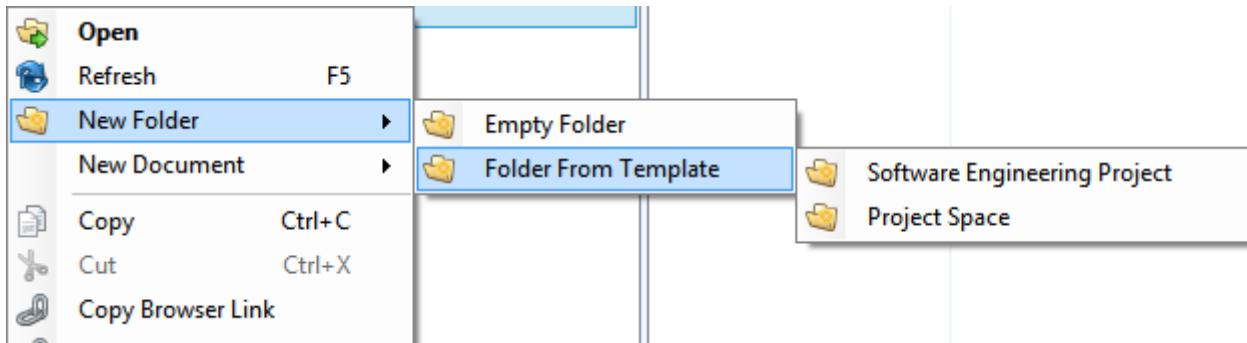


When opening a folder for the first time (or after a certain time span), Fred will query the Alfresco repository and present the contents of the folder. When another user is concurrently adding or editing content in the same folder, updates are only presented in your Fred window when you force (F5 or menu) a refresh of the folder content or after a certain time span, when the folder is reopened. This will update the sub folder list, the list of files and its meta-data in the details pane.

11.2 CREATE FOLDERS (NEW)



- To create a new subfolder, click “New Folder”.



- Select the Empty Folder
- Enter the name of the new folder and Enter.

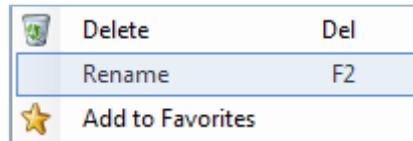


- Or select one of the Template folder structures and complete the name of the top folder

When using a folder template to create a new folder, you will copy all smart behaviour functionality (rules, scripts, ...) configured in the folder template. Contact your IT team for more information.

Create new folder is not available for Share sites folder as this is a part of the repository that needs to be set-up through the Alfresco Share interface. You can create content in de Share site document library as it is a normal folder.

11.3 RENAME FOLDERS



- To rename a new subfolder, click "Rename".
- Enter the new name of the folder and push Enter.

11.4 METADATA OF FOLDERS

See 15 Handling metadata

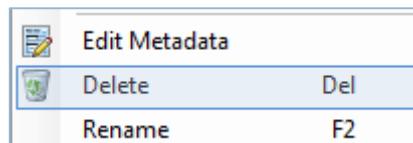
11.5 MOVE FOLDERS

By simple drag and drop you can move one or more folders to any location in the tree. You can move folders within the Navigation pane or you can move folders from the detailed pane to the navigation pane. You are prompted to confirm you want to move the folders.

Notice that you need the appropriate rights to execute a move. You will need at minimum folder creation rights in the receiving folder **and** folder deletion rights in the original parent folder.



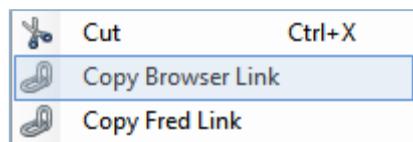
11.6 DELETE FOLDER



- To delete a folder, click Delete

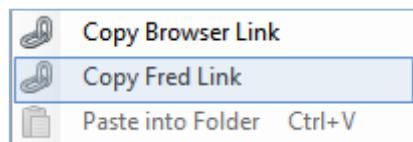
You will be able to restore the folder by clicking on Window\Recycle Bin. See 19.2 Recycle bin.

11.7 COPY FOLDER LINK



You can copy a link with the folder address to an e-mail or a document. Provided the receiving party has access rights, clicking the link will open the Alfresco Browser and show the folder and its content.

11.8 COPY FRED LINK



This copies a link which will open up a new tab in the Fred application which will have the folder highlighted in the detail pane.

<fred://a1d07cd6-2f5f-4983-99ae-c11f398107dd/browse/id/workspace/SpacesStore/fca9579b-e239-419a-b6cc-40e8f8ec6634>

Name	Info	Invoice Reference	Paid	Cust:
Incoming mail - Shortcut	Folder Link Object			
Mailbox	Folder			
MOM - Shortcut	Folder Link Object	1234-5678	False	
8.pdf	Invoice	9865-9865	False	
Alfresco_Enterprise_3_4_6_Release_Notes.pdf	Content			
Bawfall120419.docx	Invoice	1234-1289	False	
Bawfall120419.pdf	Invoice	4321-5677	False	DSJ
Brabant Club 2012-2013.msg	Invoice			Datu
Contract Mijn veld (Working Copy).doc	Contract			

You can paste the Fred link as a hyperlink into a document or an e-mail by inserting a hyperlink and pasting the Fred link into the address field.



11.9 CREATE A NEW DOCUMENT

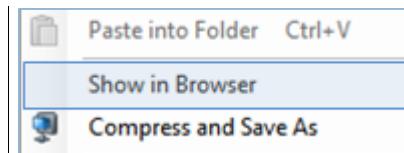
“New Document” will allow you to create a new document in Fred from templates previously defined on the Alfresco server.

New template documents can be added by the Administrator or the user with the appropriate rights. Once a template document is added to the folder Company Home/Data Dictionary/Document templates, it becomes generally available to the users.

You can set document type and metadata values for the templates. The documents created from the template will automatically inherit the templates’ metadata.

11.10 SHOW FOLDER IN ALFRESCO BROWSER

The Show in Browser command enables you to jump from Fred to the Alfresco Share (or alternative Explorer) interface



This enables you to view more folder details and use all Alfresco functionality available through the Share interface.

11.11 PRINT DOCUMENTS

You can select one of multiple documents and print these on the default printer configured on your local PC.



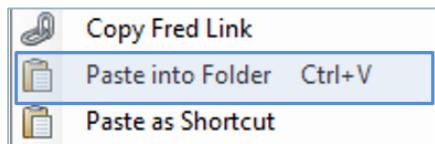
11.12 PASTE INTO FOLDER

When you copy a file from your desktop this command will be enabled. You will be able to paste the file (CNTRL + V, Paste into Folder) into the selected folder.

To clone a document from Fred into the same location or another folder in Fred you need to:

- Select the file and click Copy on the file menu (see 14.4 Copy Document)
- Select the folder in which you want to paste the link to the document
- Click “Paste into Folder” in the Folder menu

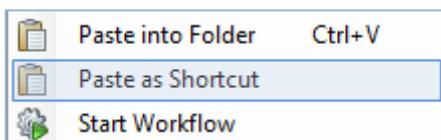
Cloning the document into the same folder will create a ‘*document_name –Copy.docx*’. Cloning it into another folder creates a ‘*document_name.docx*’.



11.13 PASTE AS SHORTCUT

To paste a link to a document into another folder you need to:

- Select the file and click Copy on the file menu (see 14.4 Copy Document)
- Select the folder in which you want to paste the link to the document
- Click “Paste as Shortcut” in the Folder menu

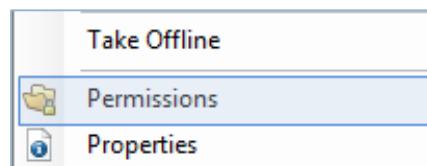


Notice that in the Info Column, the file is indicated as ‘File Link Object’. If you want to see the details of the document, double clicking the file will make it jump to the folder in which the document is located and show the metadata details.



The screenshot shows a file management interface. On the left is a tree view of folder structures: Finance, General secretary, Immo, Project A, and various sub-folders like Mailbox, MOM, and Letters. The main area displays a list of files and folders under '02 Scope'. One folder, 'Flower3', has a context menu open with options: Show Target, Delete, Rename, and Properties. The 'Show Target' option is highlighted.

11.14 FOLDER PERMISSIONS



This function is only available on those folders for which the user has more than consumer rights.

By clicking "Permissions" on the folder menu, a new tab will open and display the users and group rights set on this folder. The table indicates which rights are set for which users, if the user receives the right through the group, if the rights were inherited from a parent folder and the Authority Type.

Inherited Permissions	Role	Type	User	Email
✓ Inherited Permissions				
Fred Johnson	Consumer	USER	Johnson	
▷ immo	Coordinator	GROUP	GROUP_immo	
▷ Regie des batiments	Consumer	GROUP	GROUP_Regie des batiments	

Local Permissions	Role	Type	User	Email
✓ admin	All	OWNER	ROLE_OWNER	

The upper part of the screen is showing the permissions that are inherited from the parent folders up to the company home folder.

The lower part of the screen is showing the permissions that are set on the selected folder.

Permissions are set for users or groups. Selecting a user or group will highlight (green) in the breadcrumb the folder in which the permissions are set.

You can click on the folders in the path to see how the rights are set in the folders above.



You can set permissions for users or groups in the Local Permissions part. Click into the cell if you want to add a user. Type a name and the list of the matching users or groups appears.

Local Permissions	Role	Type
<input checked="" type="checkbox"/> XeniT		
  XeniT Solutions		
  XeniT PS		
  XeniT Engineering		
  XeniT Sales		
  XeniT Cust A team		

Click on  to add a user/group. The name is now listed in the local permissions table and you can define the role.

Local Permissions	Role	Type	User
<input checked="" type="checkbox"/>			
 Xenit Cust B team	Consumer	GROUP	Xenit Cust B team
 Fred	Consumer Editor Collaborator Contributor Coordinator	OWNER	

If you don't want this user to have access to the folder anymore, right click on his name and select "remove permission".

Local Permissions	Role	Type
<input checked="" type="checkbox"/>		
 Xenit Cust B team	All	OWNER

11.15 MULTI FOLDER FUNCTIONALITY

One can select multiple folders in the detail pane. Some commands in the folder menu are available when you select multiple folders.



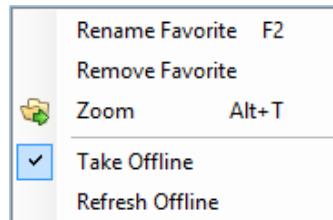
12 TAKING CONTENT OFF-LINE

You can take part of your repository off-line. In the off-line mode you will be able to navigate through your off-line structure, view the related metadata and open the documents you have taken off-line.

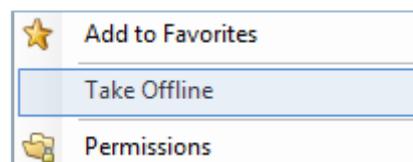
12.1 SELECTING THE CONTENT YOU WANT TO TAKE OFF-LINE

There are two ways you can take folders off-line:

- Via the menu of the Favourite Folders



- Via the menu of the folders: when you take off-line a folder in the repository, it is automatically added to your Favourites after the synchronisation has been completed



The screenshot shows the Xenit ECM application interface. On the left is a navigation tree with nodes like 'Favorites', 'My Saved Searches', 'Documents I am editing', 'Company Home', 'Customer Homes', 'Building Agency', 'Immo', and 'Project B'. The 'Project B' node is selected. To its right is a grid view showing a list of items with columns for 'Name', 'Info', 'Invoice Reference', 'Paid', 'Customer Name', and 'Task Order Reference'. Below the grid is a status bar with the message 'Successfully moved 5 item(s) to folder /Company Home/Customer Homes/Building Agency/Immo/Project B/01 Letters'. At the bottom, there is a progress bar labeled 'Synchronizing doclib'.

While synchronising, there is an indication that the process is running.

When completed, the folder is visible under the Favourite Folder and is marked with a .



Name	Info	Invoice Reference	Paid	Customer Name	Task Order Reference
20130213_075413.jpg	Invoice	4568-5645	False		
20130227_210323.jpg	Invoice	2634-9826	False		
20130227_210328.jpg	Marketing				
20130313_114203.jpg	Sales				
20130313_114210.jpg	Sales				
20130313_114214.jpg	Project				
20130313_114219.jpg	Invoice	9823-9847	False		
Flower1.jpg	Project				
Flower3.jpg	Invoice	1234-7654	False		
Flower4.jpg	Project				
Fred Head 120.png	Project				
information.png	Project				
MOM 3B.docx	Verslag				

12.2 REFRESHING THE OFF-LINE CONTENT

When you are on-line, you can update the off-line content with the newest content available on the server. Fred runs a validation check and only updates the content that has been changed on the server since the previous synchronisation.

12.3 DEACTIVATING OFF-LINE SYNC

If you want deactivate the off-line sync mode, you need to uncheck the 'Take Off-line' command in the Favourite folder.

12.4 WORKING IN OFF-LINE MODE

When you are off-line, you can connect to the local repository via the Bookmarks menu. First make sure to disconnect clicking the File/Disconnect menu. In the list of repositories, right click the bookmark you want to connect to and select Connect Off-Line.

When you are connected you will be able to navigate in the substructure which has been synchronised. Only part of the menu commands will be available.



You will be able to:

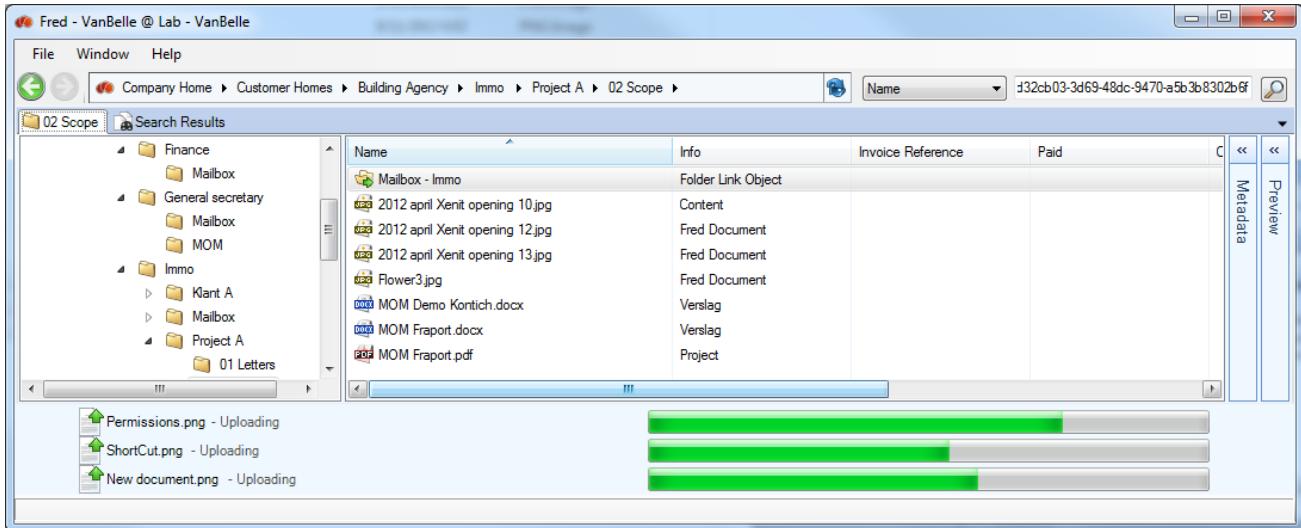
- Open the documents
- Copy a document and paste it to your desktop
- Copy a link to the document and paste the link in another document or an email
- Export the metadata which was synchronised
- Print the document to your default printer
- Zoom into a folder
- Add a folder to Favourites



13 ADDING CONTENT TO AND GETTING CONTENT FROM THE SERVER

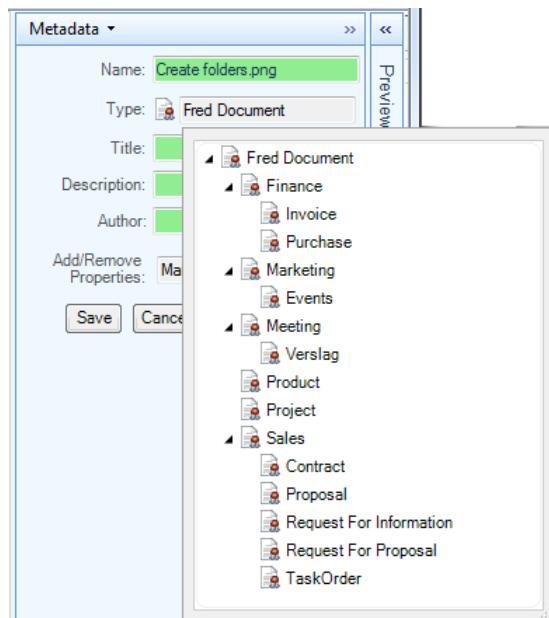
13.1 UPLOADING FILES

You can simply add any kind of file to the Alfresco repository by dragging and dropping the file from the desktop application onto any folder in the Fred window.



The file will be uploaded into Alfresco. You can drop multiple files at once or multiple single files. While the documents are uploading, you can continue to navigate and work in Fred.

Uploaded documents are listed in the upload pane. Once uploaded, you will need to complete the metadata of the file. In case the document has a general nature, you can use the base document type selected by default.



Based upon the document type selected, a set of metadata fields will appear. According to the rules defined by your organization, some fields might be mandatory and others might be optional. In the case below the document type is a Proposal and the required fields (*) are Proposal Reference and Proposal Status.



The screenshot shows the 'Metadata' tab of the Alfresco Content Authoring Application. The main form contains fields for Name, Type, Title, Description, Author, Proposal Status, Proposal Reference, and Customer Name. Below the main form is a sidebar titled 'Optional Groups' which lists various metadata categories with checkboxes. The 'Author' and 'Titled' groups are checked, while 'Classifiable', 'Customer', 'Product', 'Project', 'Supplier', 'Task Order', and 'Title' are unchecked.

At the bottom of the metadata field related to the document type, a list with optional groups of metadata fields is presented. It is for the user to judge if these optional metadata fields are relevant to the document and if it should be added to the document.

- Click on "Save" to finish the uploading of the file into the Alfresco repository.

Note:

- Mandatory metadata field are indicated with a “*”
- Metadata fields with format restriction are coloured red when the input does not comply with the restrictions.
- You will not be able to save the document if the metadata fields with restrictions are not filled in correctly.

Following applications allow drag and drop of content into Fred and are tested and supported by XeniT:

- Desktop
- MS Explorer
- MS Outlook 2003, 2007, 2010

Other applications might support the dragging and dropping of content as well and could be able to interact with Fred. By checking if the application allows dragging and dropping of a file (including content) into MS Explorer or onto your desktop, you can test the compatibility. Next step is to test the dragging and dropping into Fred.



13.2 UPLOADING FOLDERS

One can upload folders from your desktop or explorer by dragging them into Fred. An upload process will start which indicates the number of subfolders and files that need to be/have been uploaded. In this process, the user does not get an indication that metadata needs to be edited to complete the upload process.

Name	Info	Invoice Reference
2012 april Xenit opening 10.jpg	Content	
2012 april Xenit opening 12.jpg	Fred Document	
2012 april Xenit opening 13.jpg	Fred Document	
Flower3.jpg	Fred Document	
MOM Demo Kontich.docx	Verslag	
MOM Rapport.docx	Verslag	

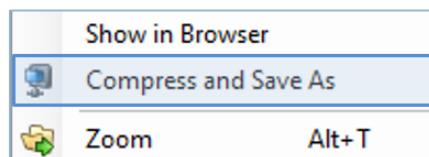
Important remark: it is only possible to extend a folder structure while uploading a folder. It is not possible to refresh/update the structure and content from a folder you copied already to Fred.

Adding documents, individually or in group, to an existing folder structure is supported and one can extend the folder structure while dragging a new subfolder structure into Fred.

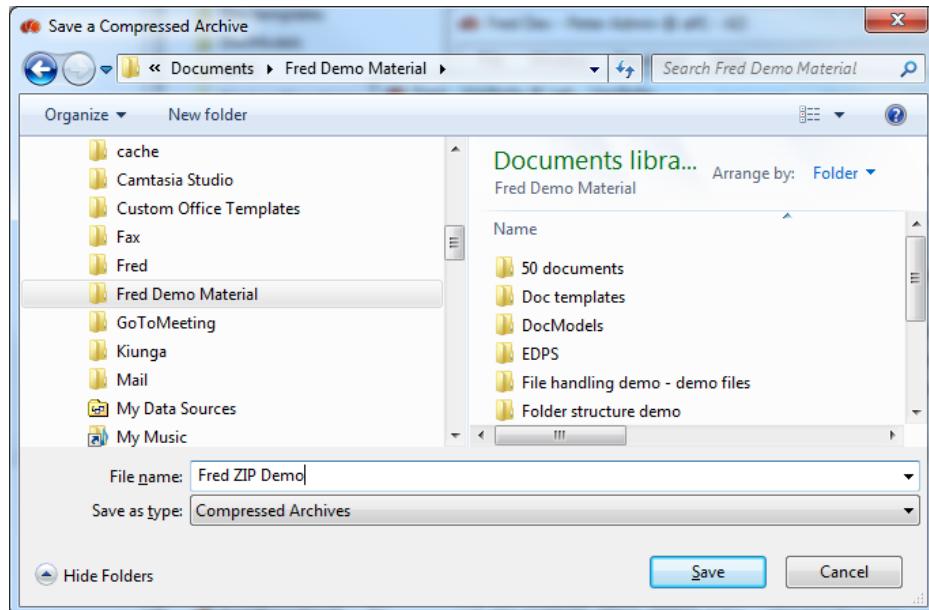
13.3 COMPRESS DOCUMENTS AND FOLDERS TO A CONTAINER ON YOUR LOCAL DRIVE

You can select one or multiple documents and/or folders and compress them into a container which will be saved on your local disk.

- Select the files you want to compress.
- Right mouse click and select “Compress and Save as”



- A browser window will pop-up asking you to select the folder and name under which you want to save the container



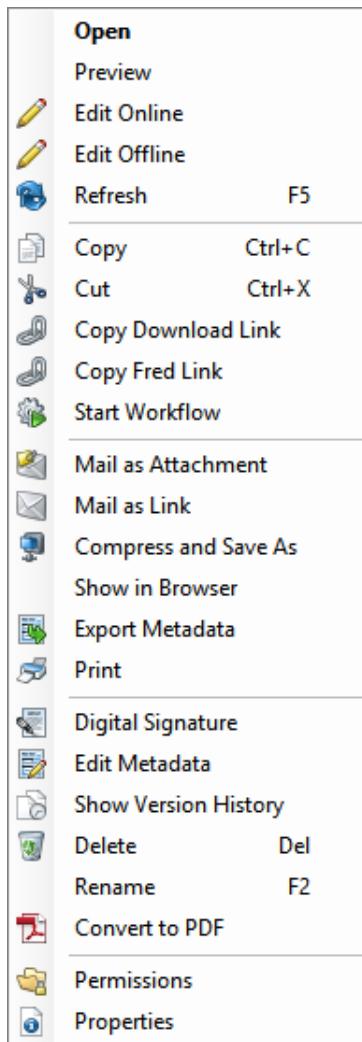
- Fred will provide a message “Successfully Saved Compressed Files”
- The container with the compressed files is available where you have saved it

Selecting a folder will compress all content in the folder, including the sub-folders and its content.



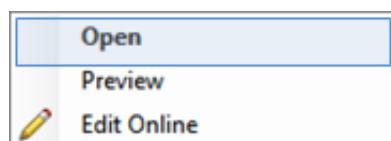
14 HANDLING DOCUMENTS

Right clicking on a file pops-up a command menu enabling you to manage the document.



14.1 OPEN DOCUMENT

Files can be opened directly from Fred by clicking the “Open” command or by double clicking the file. The file will be downloaded to a local copy and opened with the corresponding application.



14.2 DOCUMENT METADATA

See 15 Handling metadata



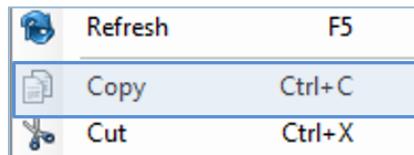
14.3 MOVE DOCUMENT

By simple drag and drop you can move files to any location in the tree. Notice that you need to have the appropriate rights to execute a move. You need at minimum file creation rights in the receiving folder **and** file deletion rights in the originating parent folder.

14.4 COPY DOCUMENT

Copying files in Fred will make a copy on the desktop clip board. You can paste the document to any application on your desktop.

A second way for copying files is to drag and drop from the Fred window onto another application window (ex. Explorer, Word document, an e-mail ...).



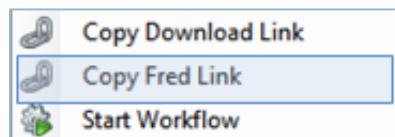
14.5 COPY A FILE LINK

Provided that the receiving users have access to the Alfresco repository, it is more appropriate not to copy the file into an e-mail communication but to copy a link to the document using “Copy Link address”, by right clicking on the file. This avoids the multiplication of identical information in the organization.



14.6 COPY A FRED LINK

This action copies a link which will open up a new tab in the Fred application which will have the folder highlighted in the detail pane.



<fred://a1d07cd6-2f5f-4983-99ae-c11f398107dd/browse/id/workspace/SpacesStore/e0348edb-24ff-458a-9f79-1828b4bd1161>



The screenshot shows the Alfresco Browser interface with a search results table. The table has columns for Name, Info, Invoice Reference, Paid, and Cust. The results include:

Name	Info	Invoice Reference	Paid	Cust
Incoming mail - Shortcut	Folder Link Object			
Mailbox	Folder			
MOM - Shortcut	Folder Link Object			
pdf 8.pdf	Invoice	1234-5678	False	
Alfresco_Enterprise_3_4_6_Release_Notes.pdf	Content			
Bawfall120419.docx	Invoice	9865-9865	False	
Bawfall120419.pdf	Invoice	1234-1289	False	
Brabant Club 2012-2013.msg	Invoice	4321-5677	False	DSJ
Contract Mijn vred (Working Copy).doc	Contract			Datu

14.7 MAIL AS ATTACHMENT

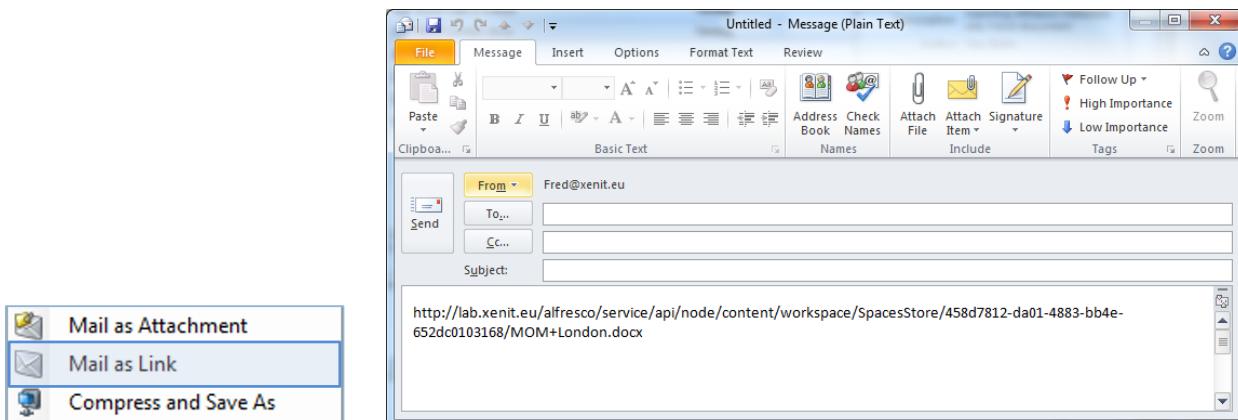
“Mail as attachment” allows you to send a document as attachment by email, directly from Fred.

The document will automatically appear as an attachment in a new email.

The screenshot shows the Microsoft Outlook 'Message (HTML)' window. The 'Attached' section shows a file named 'MOM London.docx (52 KB)'. The left sidebar shows a ribbon with 'Start Workflow', 'Mail as Attachment' (which is selected), and 'Mail as Link'.

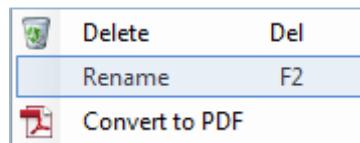
14.8 SEND DOCUMENT LINK VIA EMAIL

“Mail as Link” allows you to mail a link to a certain file or folder in Fred. Provided the receiving party has access rights, clicking the link will open the Alfresco Browser and show the file/folder and its content. By doing so, you will avoid multiplication of documents.



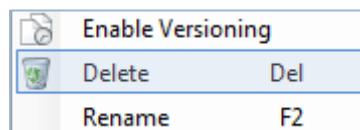
14.9 RENAME FILE

- To rename a file, click “Rename”.
- Or push the F2 key
- Or one can click once on the highlighted file.
- Enter the new name of the file and push Enter.



14.10 DELETE FILES

To delete a file click “Delete” . If you do not have the appropriate rights, this command will be disabled.

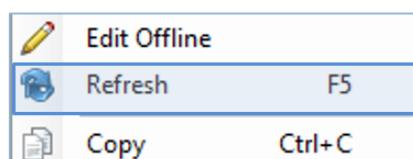


You can delete a selection of multiple files.

You will be able to restore the file by clicking on ‘Window\Recycle Bin’. See 19.2 Recycle bin

14.11 REFRESH METADATA

The metadata in the columns in the details pane or in the metadata pane are metadata of the specific time when you visited this content. If another user has updated the metadata, this will be updated in your view the next time you refresh the folder content (see 11.1 Refresh) or in the metadata pane when you reselect the document. You can enforce a refresh of the metadata by clicking “Refresh” or F5 on the folder or the file.





14.12 LOCKING, CHECK-OUT AND CHECK-IN DOCUMENTS

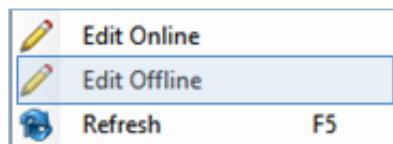
Locking a document will prevent others to upload new versions of the document. Users will still be able to preview and download the document.

Check-out and check-in are two important functions in a Document Management System (DMS):

- Check-Out: you are locking the document for other users and make a “Working Copy” of the document to be edited. The users will still be able to open the locked document, but they will not be able to modify the document on the Alfresco server. You will be able to modify the “Working Copy” of the document
- Check-in: when you have finished the modifications on the document, you can check-in the document into the original document. This will update the original document, remove the “Working Copy” and unlock the original document. Now the document is again available to others for modification.

14.13 EDIT OFFLINE

The edit offline command combines a Check-Out and the download/opening of the working copy.



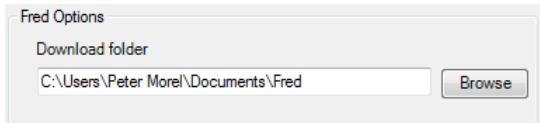
The Edit Offline command in Fred will:

- Lock the document
- Create a working copy of the original document
- Download that working copy to your local drive
- Open the working copy for editing.

The screenshot shows the Fred interface with the 'Edit Offline' command selected. The right panel displays the metadata for a document named 'MOM Demo Usability.docx'. The 'Lock Owner' field is circled in red, showing 'VanBelle' as the owner. The document has a status of 'Draft'.

Name	Info	Invoice
2012 april Xenit opening 12.jpg	Invoice	2431-54
2012 april Xenit opening 13.jpg	Project	
AUTO Didier Luthi est absent(e) (retour 21 11 20...	Fred Document	
Flower1 - Shortcut.jpg	File Link Object	
Flower3.jpg	Project	
Flower4.jpg	Project	
Flower6.jpg	Project	
ijsland13.jpg	Project	
MOM Demo Usability (Working Copy).docx	Verslag	
MOM Demo Usability.docx	Verslag	
P1050607.JPG	Project	
P1050629.JPG	Project	

The working copy is copied to a Fred folder on your local hard drive. This folder is defined in settings (repository tab) of Fred.

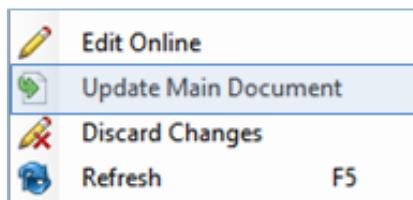


After editing the document you can simply save the local working copy of the document without indicating where you are saving the document.

When you want to continue working on the working copy after you have closed the local copy, you can reopen the local copy by double clicking the working copy in Fred or by clicking the “Open” command.

You do not need to drag and drop or upload the working copy to Fred. With the “Update Main Document” command you will:

- Upload the local working copy to Alfresco
- Update the master (locked) document with the new edited document
- Unlock the master document

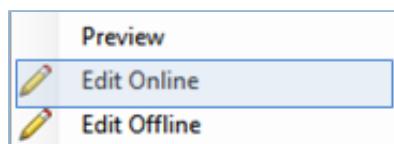


With the Discard Changes command you will be able to unlock the main document and remove the working copy including any changes you have applied to the document.

14.14 EDIT ONLINE (NEW)

Edit Online feature lets you edit your document without first saving it offline (checking it out). This functionality is only available for MS Word, MS Excel and MS Powerpoint.

The behaviour of the edit on-line varies slightly across the multiple versions of Office and whether you have Single-Sign-On. Below is a description on the behaviour on Office 2013.



Clicking the Edit Online will open de document.

Note: You might get a warning box prompting you to be sure the content can be trusted. Click OK to open the document.

Note: If prompted for login credentials, type your user name and password, then click OK. With Single-Sign-On you can avoid having to enter your user name and password. Contact your system administrator.

The document opens in a separate window. In the library refresh the page to see the lock icon associated with the file.

Important: If the file opens in Read-Only format contact your system administrator.



As soon as you have clicked the Enable Editing button in Word or you start editing the document, an invisible check-out action ensures your document remains protected, or locked, in the library during the editing session. When you finish editing the document is invisibly checked in with the updated version available to other users.

Modify the file as necessary.

Save and close the document.

This updates the document in the library with your changes.

14.15 PUSHING METADATA FROM THE ALFRESCO SERVER INTO OFFICE DOCUMENTS

Fred enables you to write Alfresco metadata values to metadata fields in office documents (MS Office, Open Office). Changing metadata values in Alfresco will change the value in the related metadata field in the document. Prerequisite is that the naming of the metadata field in the document template are the same as in the Alfresco document model.

You can create a document template which uses metadata fields to create the content. Using the above described mechanism, one can further automate/assist the creation of documents. Some examples: creation of a corporate document reference number, meeting date, meeting subject, ...

Take contact with your Fred IT team to configure this functionality at the server side.



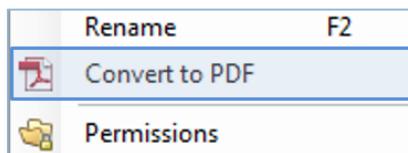
14.16 WORD ADD-IN

It is possible to download and install a Fred Word Add-in. This Add-in shows you all the business metadata which is pushed from Alfresco into the document.

The screenshot shows a Microsoft Word document titled "Minutes of meeting". The document contains red text: "Meeting topic: Fred Usability Study", "Date: xx/xx/201x", "Time: xx:xx", and "Place:". Below this, there are sections for "STATUS: DRAFT", "AGENDA" (with a table for "Topic" and "1."), and "ATTENDEE LIST". A "Fred Add-In Toolbar" is visible at the top of the document area. A "Custom Document Fields" dialog box is open in the foreground, displaying metadata such as Creator, Modifier, Repository Location, Name, Modified Date, Status, Created Date, Title, and a note about <unknown>. The dialog also includes an "OK" button.

14.17 CONVERT TO PDF

The Convert to PDF command is available for MS Office documents and converts the document into a PDF version using the MS Office application on your desktop.



A PDF version of the document is made available on Alfresco in the same folder.

14.18 PREVIEW DOCUMENT (ENHANCED)

There are multiple options to preview a document:

- Enhanced preview as provided by Alfresco Share
- Image preview of the first page
- Text preview without formatting. The text is selectable.
- Html preview for outlook email files.



Fred - VanBelle @ LabNew - VanBelle

File Window Help

Company Home > Customer Homes > Building Agency > General secretary > Mailbox >

Mailbox Search 2014-trafigura-annual-report.pdf

Favorites My Sties My Saved Searches Documents I am editing Company Home Billing Billing Examples Files Customer Homes Building Agency Finance General secretary Images Mailbox MOM Immo Klant A Mailbox Project A Project B Project C Project X 01 Letters 02 Scope 03 Plans 04 Reporting 05 Contracts 06 Financial Plan Management Products

Name

2014-trafigura-annual-report.pdf

Aanbiedingen voor tablets vanaf 62 euro-20130820-120821.msg Autocompletion - Metadata.png Baswaal120419.docx Compare WORD Documents 1.png Contacten All.csv ContractsImage_Contract_eng.pdf correspondence forms-config.json-disabled default-node-forms-config.json delightful-flower.jpg denote.gif Demo Customer Meeting.docx Demo ECM Curata.docx Final Call persoonlijke uitnodiging voor het Automotive Luxury Event 2014 28 08 2014-20140926.Letterimage_Letter_eng.pdf Make Your Business Applications a Competitive Differentiator-20130904-104334.msg MOM ATENOR.docx MOM Demo Gent.doc MOM Demo Gent.pdf MOM The City.docx New eBooks TechEd specials and up to half off-20130820-121041.msg OCMW Xmas.docx Proof nu de lekkerste koffie van België-20150305-084947.msg RosterByConferenceAndStatus.pdf

Preview > Pagina: 1 van 132 Automatisch zoomen >

TRAFIGURA
2014 ANNUAL REPORT

Metadata saved

Preview >

Default (Full Preview)

Full Preview

Image Preview

Text Preview

Html Preview

Right

Bottom

Preview > Pagina: 1 van 6 60% >

Xenit Project Title

Customer Name

11 Feb. 2013

DESCRIPTION

Our reference: XXX-XXXXX
Commercial representative: Peter Morel

Preview > 100% >

A close-up photograph of a dense cluster of pink flowers with white, fuzzy, seed pods.



The administrator can determine per document type what the default preview is. When browsing through a list of documents, one will get the default preview of that document.

Clicking the "Preview" in the file menu will open the preview of the document in a separate tab.

This command will not be enabled when no preview of a document is available. Contact your administrator to enable previews for specific document types in Alfresco.

14.17 ENABLE VERSIONING
Versioning of a document can be activated through the Fred interface. By default, a document is not versionable in the Alfresco repository.

When uploading the same document (same name) you will be asked to upload a new version or to cancel uploading. You can specify if the new version is a minor or major version and provide comments on the new version.

Weekly Email Blast

From: Robert Marshall
To: Ian Pope; Mukul Madan
Recipients: Ian.Pope@Ephesoft.com; Mukul.Madan@Ephesoft.com

Hi All,

This is just a quick email blast once a week to give you a quick tip on things you may not know about Ephesoft.

This week's email is on Optimizing Ephesoft, something that everybody should do but not everybody does, doing so will increase your speed and ease your workload by not making Ephesoft check unnecessary plugins every time you run a batch.

To learn more on this please visit the following article on our wiki site - http://www.ehesoft.com/wiki/index.php?title=Optimize_Ephesoft

Rob Marshall | Application Support Engineer

The administrator can determine per document type what the default preview is. When browsing through a list of documents, one will get the default preview of that document.

The enhanced preview as provided by Alfresco enables you to search text within the preview of MS Office and pdf documents, you can select and copy text and you get some other handy features.

Find: Brazil Highlight all Match case

Primary crusher at Trafigura's MATSA mine, Seattle, Spain.

A RESILIENT BUSINESS MODEL
Trafigura's response to these challenges remains the same as it has been throughout its more than two decades of growth: to concentrate on creating a business diversified by geography, product, customers and financing that is resilient and delivers reliable and efficient service to our customers in the widest variety of economic and business circumstances.
In markets characterised by oversupply, we know we have to work harder to deliver value. In 2014, this involved five main areas of strategic focus.

INVESTING IN INFRASTRUCTURE
First, we combined growth in trade flows with a continued programme of targeted investments in logistics and infrastructure. Jointly with our partners, we invested in the expansion of our terminals and logistics platforms. Impala subsidiary acquired a controlling interest in a world-class iron ore export facility at Porto Suldeste in Brazil's Rio de Janeiro state. From early 2015, the port will be at the service of the mining industry in the so-called Iron Quadrangle of Minas Gerais, with an initial annual export capacity of 50 million tonnes and potential capacity of 100 million tonnes.

The Group broadened its activity through profitable volume growth in both trading divisions; by expanding newer business lines as well as long-established ones; by entering new territories from Brazil to Papua New Guinea; and by exploring and executing new investment projects in infrastructure and logistics.

TRAFIGURA ANNUAL REPORT 2014 89

CHIEF EXECUTIVE'S STATEMENT
This was the largest of a large array of infrastructure investment and construction projects around the world and around the Group. In Colombia, Impala Terminals' multimodal transport system centred on the Magdalena River and, on the Pacific Coast, the FDP railway is ramping up operations. In Peru, Impala Terminals completed a major upgrade and expansion programme at its metals storage, blending and export terminal in the Port of Callao.

In Africa, Trafigura and other Group companies worked on a range of infrastructure development projects in support of Trafigura trading flows. In Spain's southern province of Andalucía, our MATSA mine completed a significant expansion programme including installation of a new treatment plant, and embarked on creation of a new export facility at the Port of Huelva.

Recently, we have broken new ground in addressing the corporate responsibility agenda by becoming the first commodities trader to join the Extractive Industries Transparency Initiative (EITI), a global coalition of governments and companies working together to



The screenshot shows a document preview interface. On the left, there's a sidebar with thumbnails of other documents. The main area displays a document page with a large image at the top. A context menu is open on the right side of the screen, listing options like 'Go to First Page', 'Go to Last Page', 'Rotate Clockwise', 'Rotate Anti-Clockwise', 'Enable hand tool', and 'Document Properties...'. The document content includes sections like 'A RESILIENT BUSINESS MODEL' and 'CHIEF EXECUTIVE'S STATEMENT'.

Within the navigation tab and the search tab, you can configure to have the preview at the right or at the bottom of the details pane.

The screenshot shows a desktop application window titled 'Fred Dev - VanBelle @ Lab - VanBelle'. The window has a standard Windows-style title bar. Inside, there's a navigation pane on the left with a tree view of folder structures, including 'General secretary', 'Favorites', 'My Saved Searches', and various company home folders. The main area contains two panes: one for 'Name' (listing files and folders) and one for 'Info'. Below these is a 'Preview' pane which currently displays an email titled 'Weekly Email Blast' with recipient information: From: Robert Marshall, To: Ian Pope; Mukul Madan, Recipients: Ian.Pope@Ephesoft.com; Mukul.Madan@Ephesoft.com. The preview also shows a message body starting with 'Hi All,' and a note about it being a weekly email blast. At the bottom of the preview pane, there's a link to an article: 'To learn more on this please visit the following article on our wiki site - http://www.ehesoft.com/wiki/index.php?title=Optimize_Ehesoft'.



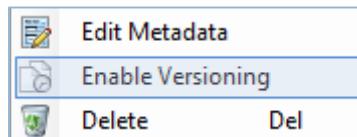
Clicking the “Preview” in the file menu will open the preview of the document in a separate tab.



This command will not be enabled when no preview of a document is available. Contact your administrator to enable previews for specific document types in Alfresco.

14.19 ENABLE VERSIONING

Versioning of a document can be activated through the Fred interface. By default, a document is not versionable in the Alfresco repository.



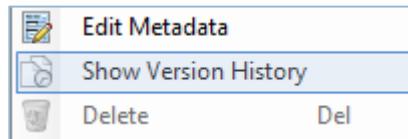
When uploading the same document (same name) you will be asked to upload a new version or to cancel uploading. You can specify if the new version is a minor or major version and provide comments on the new version.



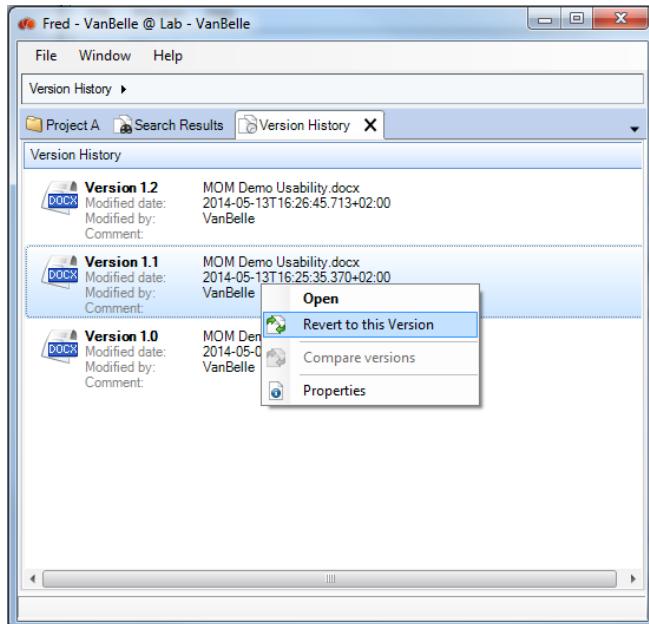


14.20 SHOW VERSION HISTORY

Once a document is made “versionable”, the command “Show Version History” becomes available.



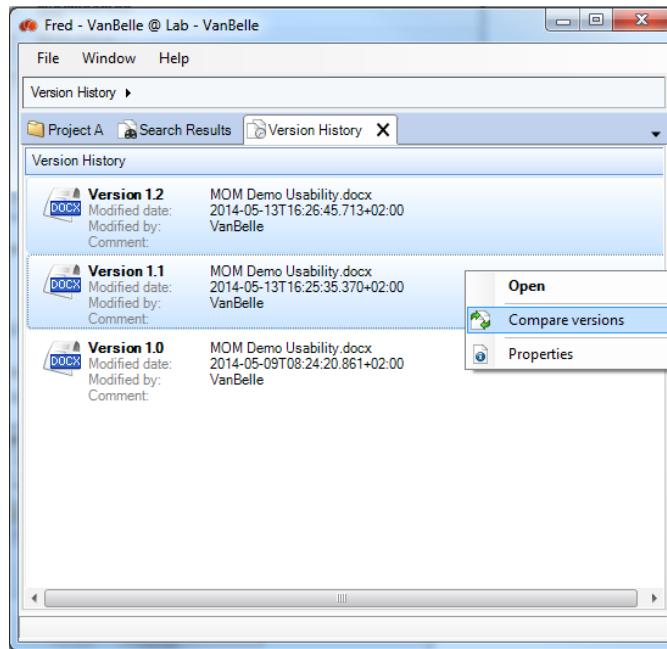
With this command you can see the list of all versions of the document. Every version can be opened individually. You cannot upload documents in this list.



You can revert an older version of the document to the most recent version. This will create a new version.

14.21 COMPARE WORD DOCUMENTS

You can compare two version of a WORD document. When selecting two version of a specific WORD document, the Compare Version command will be enabled.

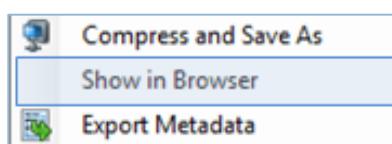


The Compare versions command will download both version and use the WORD application on your desktop to compare the two versions.

The screenshot shows a Microsoft Word document titled "Minutes of meeting". The document contains sections for AGENDA, ATTENDEE LIST, and MEETING NOTES. On the left, the "REVIEW" tab is active, showing a list of tracked changes by "Peter Morel". The right side shows the final, revised version of the document with the changes applied. The Word ribbon at the top includes tabs for FILE, HOME, INSERT, DESIGN, PAGE LAYOUT, REFERENCES, MAILINGS, REVIEW, and VIEW.

14.22 SHOW FILE IN ALFRESCO BROWSER

The “Show in Browser” command enables you to jump from the Fred window to the Alfresco Web interface. This enables you to view more file details and use all functionalities available in Alfresco.

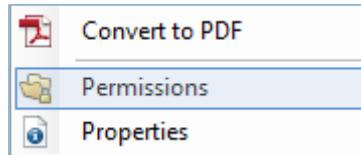




14.23 FILE PERMISSIONS

Similar as to Folder permissions, you can read and set permissions on files.

See “11.14 Folder permissions” for more information.



14.24 MULTI DOCUMENT FUNCTIONALITY

Some commands in the file menu are available when you select multiple folders: “Open”, “Edit Offline”, “Copy”, “Cut”, “Copy Link Address”, “Mail as attachment”, “Mail as Link”, “Show in Browser”, “Delete”, “Properties”, for all the selected documents.

14.25 USING SHORTCUTS

A full list of the shortcuts available:

- Ctrl+C= Copy file/folder
- Ctrl+X= Cut file/folder
- Ctrl+V= Paste file/folder
- Ctrl+A= Select All
- Ctrl+Q= Quit application
- Ctrl+F= Quick search in Fred
- Ctrl+T= Add new tab
- Ctrl+A= Select all objects in the detail navigation pane or in the details search pane
- Del= Delete file/folder
- F2= Rename file/folder
- Backspace= Previous menu
- Alt+arrow left= Go to previous menu or submenu
- Alt+arrow right= Go to next menu or submenu



15 HANDLING METADATA

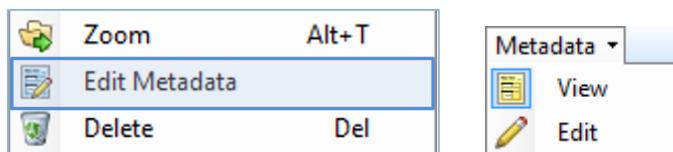
15.1 VIEWING METADATA OF FOLDERS

You can view the metadata linked to a folder in the Metadata pane. The metadata appears when you select a folder in the navigation pane or in the details pane.

Name	Info
Klant A	Folder
Mailbox	Folder
Project A	Folder
Project B	Folder
Project C	Folder
Project Space projsom	Folder
[#XENFRED-1046] dragging URL into Fred gives...	Fred Document
1 - Shortcut.pdf	File Link Object
20130706_111216_fred.jpg	Product
5.pdf	Invoice
ALDI Newsletter vanaf woensdag 14 maart.msg	Fred Document
Bent u klaar voor een nieuwe tijd .msg	Invoice
Demo Workflow.docx	Verslag
Flower3.jpg	Content
Flower4.jpg	Content

15.2 EDIT METADATA OF FOLDERS

- To edit the metadata fields of a folder, click “Edit Metadata” in the metadata pane.



15.3 VIEWING DOCUMENT METADATA

Metadata of files and folders are presented in the Metadata pane. As you scroll through the list, data in the metadata pane will be updated.



The screenshot shows the Fred ECM interface. On the left is a navigation tree with categories like Favorites, My Saved Searches, Company Home, Customer Homes, and Immo. The Immo folder is selected. The main area displays a list of files and their metadata. A specific file, 'MOM Demo HK.doc', is selected and its detailed metadata is shown on the right. The metadata includes fields such as Name, Info, Metadata, and various descriptive values like 'Type: Contract' and 'Author: Toon'. At the bottom, there are buttons for 'Edit Metadata' and 'Save'.

In the example above you will see that this Document type is an “Project” which has the standard metadata field (creation date, creator, ...) and some specific metadata fields(project name, customer name, ...).

15.4 EDIT DOCUMENT METADATA

“Edit Metadata” will open the window to edit the metadata field values. You can further detail the document type and/or add additional optional metadata groups. These steps are described in 13.1 “Uploading file”.

The screenshot shows the 'Edit Metadata' dialog box and a context menu. The dialog box contains fields for Name (Demo iPAD.docx), Categories (Commissies,Dossiers), Status (Approved), Last Accessed Date (15/02/2012), and a 'Save' button. Below the dialog is a context menu with three items: 'Digital Signature', 'Edit Metadata' (which is highlighted in blue), and 'Enable Versioning'.



15.5 AUTO COMPLETION OF METADATA VALUES (SOLR)

When the Alfresco server is using SOLR indexing, then one can activate the text metadata field to have auto completion behaviour. While you are typing, Fred will suggest possible values that fit the text you are typing. As you have narrowed down the options while typing, you can select with the mouse or with the keyboard arrows the correct value and move to the next field.

Important remarks:

- The Auto suggestion is case sensitive!
- When you add a new value to the filed, it will take some time before this value will appear in the suggestions. The delay is dependant of multiple elements specific to your environment. In ideal conditions it can be as short as 15 sec.

15.6 VIEWING METADATA OF MULTIPLE DOCUMENTS

All metadata fields, as defined in the Alfresco document model, can be selected as a column in the Fred window. This allows you to sort the files. See '16 Handling views' for more information.

15.7 EDITING METADATA OF MULTIPLE DOCUMENTS

Selecting documents in the details pane will show the metadata fields which are common for the selection in the metadata pane. In case all fields are blank or have identical values, they will be presented in the view mode. In the view mode of the metadata pane, fields which have different values in the document selection will be marked as 'Multiple values'.



The screenshot shows the Fred Dev - VanBelle @ Lab - VanBelle application interface. The left sidebar contains a navigation tree with categories like Favorites, My Saved Searches, Company Home, Billing, Billing Example Files, Customer Homes, Building Agency, Finance, Images, and Mailbox. The main area displays a list of documents with columns for Name, Info, Invoice Reference, Paid, and Metadata. A detailed metadata pane on the right shows fields like Name, Type, Title, Description, Author, Creator, etc., for the selected document.

When you select the edit mode of the metadata pane, you are able to update the values of the common metadata fields. Please note following behaviour:

- Not filling in a field will not change the existing values in that field
- Filling in a value in a field will overwrite the existing values in that field

The screenshot shows the Fred Dev - VanBelle @ Lab - VanBelle application interface. The left sidebar contains a navigation tree with categories like Favorites, My Saved Searches, Company Home, Billing, Billing Example Files, Customer Homes, Building Agency, Finance, Images, and Mailbox. The main area displays a list of documents with columns for Name, Info, Invoice Reference, Paid, Customer Name, Task Order Reference, and Metadata. A detailed metadata pane on the right shows fields like Name, Type, Title, Description, Author, Creator, etc., for the selected document. The 'Type' field is currently set to 'Invoice'.

For categories following behaviour is defined:

- Checkbox or indicates that all documents have that value
- Checkbox indicates that the selection contains multiple values.
- When clicking the checkbox, it will iterate between , and . This is indicating that you want to provide the field the new value or , respectively that you want to leave the different values in the document selection unchanged.



15.8 EXPORTING METADATA

In the detailed pane and the search pane, you can export the metadata of selected objects and save them to a comma separate file on your local drive.



Name	Info	Author
Contract 121211_1.pdf	Contract	Toon
Contract Demo Fred 2...	Contract	Toon
Contract Demo Fred 2....	Contract	Toon
Demo P&V (Working C...	Contract	Toon
Demo P&V.doc	Contract	Toon
Demo P&V.pdf	Contract	Toon
MOM 123.doc	Contract	Toon
Flower2.jpg	Fred Document	
Flower3.jpg	Fred Document	
Flower5.jpg	Fred Document	
Flower6.jpg	Fred Document	
Innovatiecentrum Maa...	Fred Document	
Maart.xlsx	Fred Document	Ingrid Carton
Praat met uw nieuwe kl...	Fred Document	
Proftoer meteen van k...	Fred Document	
Security managers min...	Fred Document	
Veel bouwellingen is te ...	Fred Document	

The metadata of the columns that you selected in the view will be exported to a local file.

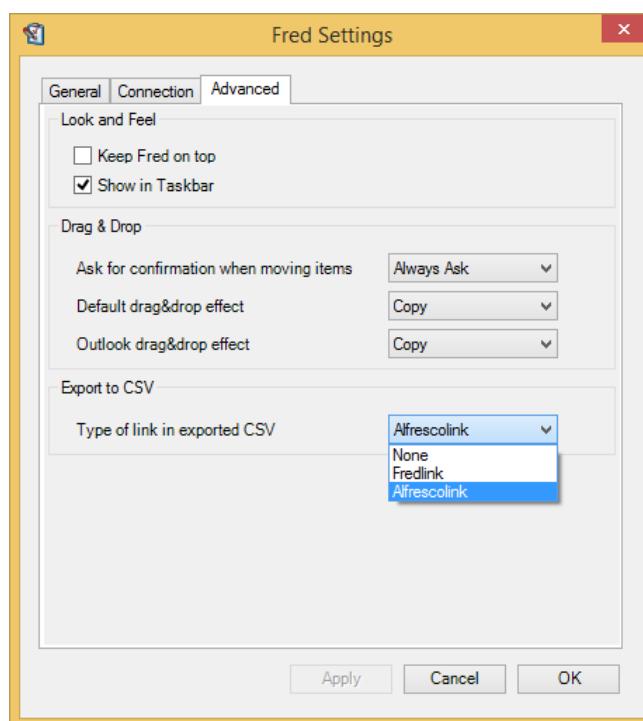


Demo Export.csv - Excel

	A	B	C	D	E	F	G	H	I	J	K	L
1	Alfresco-link	Name	Info	Author	Owner	Creator	Created Date	Modifier	Modified Date	Contract Reference	Contract Status	Customer Name
2	http://lab.xenit.eu/alfresco/	Demo P&V.doc	Contract	Toon		VanBelle	23/02/2012 14:24	VanBelle	5/06/2012 10:56	33333XXXXYYYYYYYYYY	Signed	Alfresco
3	http://lab.xenit.eu/alfresco/	Demo P&V.pdf	Contract	Toon		VanBelle	12/03/2012 13:30	VanBelle	22/06/2012 16:02	33333XXXXYYYYYYYYYY	Signed	Alfresco
4	http://lab.xenit.eu/alfresco/	Demo P&V (Working Copy).pdf	Contract	Toon		VanBelle	13/03/2012 15:36	VanBelle	5/06/2012 11:14	33333XXXXYYYYYYYYYY	Signed	Alfresco
5	http://lab.xenit.eu/alfresco/	Contract Demo Fred 2.0.doc	Contract	Toon		VanBelle	22/06/2012 16:12	VanBelle	22/06/2012 16:13		2145685	Signed
6	http://lab.xenit.eu/alfresco/	Contract Demo Fred 2.0.pdf	Contract	Toon		VanBelle	22/06/2012 16:13	VanBelle	22/06/2012 16:15		2145685	Signed
7												
8	http://lab.xenit.eu/alfresco/	Contract 121211_1.pdf	Contract	Toon		VanBelle	11/12/2012 14:22	VanBelle	11/12/2012 14:22	121211_1		Signed
9	http://lab.xenit.eu/alfresco/	Profierteer meteen van korting tot Fred Document				VanBelle	16/02/2012 12:04	VanBelle	16/02/2012 12:04			
10												

You can now add additional records to the list by selecting new objects and using the shortcuts CTRL + C or the COPY command to copy the metadata to the desktop clipboard. You can paste then the metadata values to an excel table.

You can configure is a hyperlink to the object should be added as first column. This parameter is set in the advanced tab of the Fred configuration: File>Open Settings



15.9 METADATA GOVERNANCE – MANDATORY METADATA

When uploading documents to the server, standard document properties are extracted automatically from the document and you are invited to edit the business metadata. You can choose to keep the default document type and not to add extra metadata.

Adding extra metadata fields and values is helpful in finding back the content and providing extra views on the content. To guide the users in completing the appropriate metadata, you are able to add some additional metadata governance in specific folder structures.

This functionality needs to be properly configured on your server. Contact your IT team for this.

How to activate the metadata governance on a specific folder



You can activate the mandatory metadata governance on a specific folder and its subfolders by adding the Enable Metadata Aspect to the folder.

The screenshot shows the Fred ECM interface with the 'Immo' folder selected in the left navigation tree. The central pane displays a list of files and folders under 'Immo'. The 'Metadata' panel on the right shows 'Project A' selected with 'Extra Metadata Validation' checked. The status bar at the bottom indicates '20130708_073230.jpg - Metadata Required'.

An indication that the Metadata Validation is activated is provided in the metadata panel of the folder as shown below.

The screenshot shows the Fred ECM interface with the 'Immo' folder selected in the left navigation tree. The central pane displays a list of files and folders under 'Immo'. The 'Metadata' panel on the right shows 'Validation Enabled.' in the 'Mandatory Metadata' section. The status bar at the bottom indicates '20130708_073230.jpg - Metadata Required'.

Metadata Validation behaviour

When the Metadata Validation is activated on a folder, following behaviour will be standard:

- You will be able to upload documents into this folder structure.



- Document for which the document type or the metadata values are not compatible with the metadata governance rules will remain visible in the upload progress pane until the metadata is completed correctly.
- When adding to many document with metadata that do not pass the validation check, you will be restricted from adding additional documents to the repository. The limit of number of 'invalid' documents is defined on the server.

The screenshot shows a Windows application window titled "Fred - VanBelle @ Lab - VanBelle". The left sidebar shows a navigation tree with categories like Favorites, My Saved Searches, Documents I am editing, Company Home, Customer Homes, Building Agency, Immo, Project A, Project B, Project C, Project Space proj., Management, and Products. The main area displays a table with columns "Name", "Info", and "Metadata". The "Metadata" column for the selected row (20130708_073230.jpg) shows fields for Name*, Type (Events), Title, Description, Author, Responsible for metadata (VanBelle), and Event ID*. Below the table, a preview pane shows five files with "Edit Metadata" buttons next to them. The status bar at the bottom right indicates the URL: fred://a1d07cd6-2f5f-4983-99ae-c1ff39e.

Metadata validation rules

- The document type cannot be generic (i.e. Fred Document, Company Document, ...) and must be specified in detail (i.e. Invoice, Project, Minute Of Meeting, ...). The list of 'generic' document types are defined on the server.
- For document types which contain mandatory metadata fields (indicated by a * next to the description), the fields must be completed with the appropriate values.

Behaviour with rules

When documents are uploaded in folders where automated rules are changing the document type and/or the metadata values, the validation check will run against the values after the rule has been executed. If the validation is positive, the document record will be removed from the upload pane after you have save the metadata.

Other people updating the metadata

When other people will complete the metadata, validation check will be positive and the document record will be removed from the upload list.



15.10 EASY INTEGRATION WITH THIRD PARTY METADATA APPLICATIONS

Fred includes the possibility to connect to a metadata database or table, in which it can query metadata values linked to a record key (i.e. customer ID stored in Alfresco metadata field) in the database and present these values in presentation fields in the Fred User Interface.

For more information, contact your IT team.



16 HANDLING VIEWS

16.1 SHOW COLUMNS

In the Browse pane and the Search pane, you can add columns to the view by a right mouse click on one of the existing column headers, selecting “Show Column”. In that list you can select or unselect the field you want to present in the column.

The list of fields is the summary of all metadata fields in all document types defined by your organization. You can modify the width of the column by dragging the edge of the column header. Notice that these modifications are persistent over the Fred sessions.

16.2 SHOW A SET OF COLUMNS

In the browse and search pane you can change your column view. Fred allows the selection of a predefined or custom defined set of columns.

The predefined column sets are all the document types defined in the Alfresco document model. Selecting one of these document types will show all metadata fields related to this document type in columns.



The screenshot shows a list of documents in a repository. A context menu is open over the 'Invoice Reference' column header. The menu path 'Column sets > By Document Types' is highlighted. Subsequent dropdowns show 'Invoice' selected under 'Product'.

Name	Info	Invoice Reference	Paid	Customer Name
Mailbox	Folder	Show column		
8.pdf	Invoice	Column sets		
Alfresco_Enterprise_3...	Content			
Brabant Club 2012-201...	Invoice	4321-5677		
Contract Mijn vred (Wo...	Contract			
Contract Mijn vred.doc	Contract			
CV_11158299_KRGO_...	Invoice	3254-5825		
EstimatedRevenue.pdf	Invoice	6543-9087		
Flower1.jpg	Invoice	3217-7654		
Flower2.jpg	Invoice	6547-9876		
Flower3.jpg	Invoice	2345-8765		
Flower4.jpg	Invoice	9999-8888	False	

You can pick the individual columns you want to add in your custom view. This view will be set as the actual view and will be maintained when closing and reopening the repository.

16.3 CREATING PERSONAL VIEWS

You can select a specific set of columns and save this view with the “Save current Columns”. You will be prompted to provide a column set name. As from now, this column set will be available under “Saved Column Sets”.

The three screenshots show the 'Column sets' dropdown menu at different stages of selection. In the first screenshot, 'Save Current Columns' is highlighted. In the second, 'Delete column sets' is highlighted. In the third, 'Delete column sets' is still highlighted, and 'Mailbox' is shown as a potential target for deletion.

You can remove the custom column set by using the “Delete Column Sets” command.

16.4 SORT ON COLUMNS

Clicking on the column header will sort the files on alphanumeric values within the folder.

16.5 ZOOM

The Zoom function provides alternative and extended navigation functionality in a subpart of the folder structure. It is mainly used to provide a different view on the content in for example a project folder.

In a first version, Zoom provides an extra navigation structure based on the Category structure as defined on your Alfresco server.

Select the folder and click on Zoom.



The screenshot shows the Fred ECM interface with a context menu open over a folder named 'Project A'. The menu includes options like Open, Refresh, New Document, Copy, Cut, Copy Link Address, Copy Fred Link, Paste into Folder, Start Workflow, Show in Browser, Compress and Save As, Zoom, Edit Metadata, Delete, Rename, Add to Favorites, Permissions, and Properties. The Details pane on the right shows metadata for 'Project A'.

A separate tab will open where the selected folder will become the root folder and the sub folder structure is presented. All navigation and document functionality is available, provided you have the permissions in this sub structure.

The category structure is presented as an additional navigation structure. Selecting a folder will filter the content in the above folder structure and present the list in the Details pane.

In the example below, selecting Commission will present all documents of project A which have been tagged with the categories 'Commissies', 'Energie' and 'KMO'.

The screenshot shows the Fred ECM interface with a filtered view of documents under the 'Commission' category. The left sidebar shows a category structure with 'Project A' expanded and 'Commission' selected. The main pane lists documents: 20130213_075408.jpg, 20130213_075413.jpg, 20130708_073119.jpg, 20130708_073139.jpg, and Flower3.jpg. The Details pane on the right shows metadata for the first document, including a 'Categories' section listing 'SME', 'Dossier C.British English', and 'Western Europe'.

Uploading documents into the Zoom Tab

You can upload documents into a specific folder in the Zoom Tab.

You cannot upload documents when you are navigating in the Category structure as this does not indicate in which folder you want to upload the document.



16.6 VIRTUAL VIEWS

A Virtual folder is a filtered view on a part of the document repository. It allows to create a virtual folder structure based on filtered views on the repository.

Below is an example of views defined for an invoice approval process. The views are defined in configuration files in the Data dictionary. For each folder, one can define the filter, the folder icon, the columns, ...

The screenshot shows a Windows application window titled "Workflow Overview". The title bar includes the text "Fred - admin @ Lab - Admin". The main interface has a left sidebar with a tree view of "Invoices - *All" containing various filters like "Favorites", "My Saved Searches", and "Invoicing". The right side displays a table titled "Workflow Overview" with columns: Name, Info, Invoice Nr, Total incl. VAT, Transportatio..., Status, and Location. The table contains three rows of invoice data:

Name	Info	Invoice Nr	Total incl. VAT	Transportatio...	Status	Location
Invoice1.pdf	Invoice in	100200	100.00	10.00	Approved	/Billing/Archive/Invoice/2...
Invoice1.pdf	Invoice in	100200	100.00	10.00		/Testing
Invoice2.pdf	Invoice in					/Billing/Example Files/Invo...

On the far right, there are buttons for "Metadata" and "Preview".

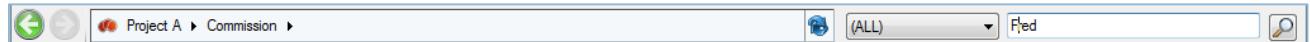
The ECM technical team can configure Virtual Views.



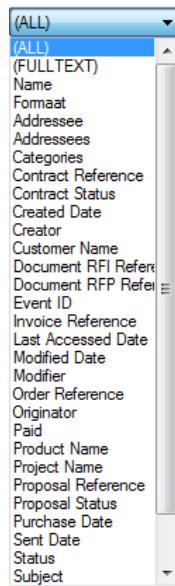
17 SEARCHING

17.1 SIMPLE SEARCH

At the top of the Fred Window you are able to type in any text you are looking for.



The search will look for the text in any metadata field and in the text of the document if it is text-searchable. The search will be restricted to the folder set in the breadcrumb and its subfolders.



The generic search will look for this value in:

- Folder names
- File names
- Metadata fields
- Document searchable content
- Format

When selecting a metadata field, search will be restricted to this metadata field.

When selecting a “Full Text”, search will be restricted to searchable content.

Some simple rules to optimize the search result:

- Blanks between words will provide the search result where both words appear
- Use wildcards before and/or after the word (*health*) when you are looking for that text in a part of a metadata field, document, ...



The screenshot shows the Fred application window titled "Fred - VanBelle @ Lab - VanBelle". The main area displays a list of search results under the tab "Search Results". The results are filtered by "Location" (Company Home > Customer Homes > Building Agency > Immo) and "Type" (Content and Folder). A search term "Fred" is entered in the search bar. The results table includes columns for Name, Info, Creator, Created Date, Modifier, Modified Date, Customer Name, and Project Name. The results list includes various documents like "2012 april Xenit opening 06.jpg", "20130706_111216.jpg", and "20130708_073107.jpg", along with projects and products.

The search result will be presented in a separate tab as a list view and show all available field values of the selected columns. Again, you can select the column set you want to see and the list can be sorted by clicking on the column header.

17.2 DROPPING AN ALFRESCO LINK OR FRED LINK IN THE SEARCH FIELD

If you have received an Alfresco or Fred link to an object, you will be able to copy and paste it into the Search field. You will get the object in the search result.

17.3 ADVANCED SEARCH

The simple search can be extended to a more complex search. To add or delete search criteria, click on .

The screenshot shows the Fred application window with an advanced search configuration. The search term is "Fred OR wilma". Filters applied are "Created Date" from "1/04/2014" to "13/05/2014" and "Categories" set to "Energy". The search results list includes items like "2012 april Xenit open", "20130706_111216.jpg", and "20130708_073107.jpg", along with other documents and projects. A sidebar on the left shows the category hierarchy for "Energy".

If you want to refine your search, you can add as many metadata fields as you want. Click on the to execute the search.



17.4 FACETTED SEARCH (ENHANCED)

Where SOLR indexing has been activated on the Alfresco Server, one will get additional filtering functionality in the search result. On the left a list of facets and values of the search result will be presented.

The facets appearing in the left column are predefined by your organisation. Contact your IT team if you want to see extra fields appear in this list to optimize your search.

For each facet defined in the search pane, a list of values which appear in your search result and the number of records containing that value are presented.

Selecting one of the values will filter the search results to those documents containing the value. The facets pane will be updated to the new search result. The Facet fields and the number of records will be updated to those appearing in the filtered result.

In the example below, selecting Modifier VanBelle filters the search result to all documents modified by VanBelle and the facet values and the number of hits (Verslag from 21 to 19 hits) will be filtered to this content where VanBelle is the last modifier.

Selecting multiple facets, you can quickly narrow down the search result and find back the document you were looking for.

The screenshot shows the Alfresco search interface with the title "Fred - VanBelle @ LabNew - VanBelle". The search bar contains the query "35 Search Results". The facets pane on the left lists categories like Location, Type, and Created Date, with "Modified Date" expanded to show options like "This month (21)", "This year (35)", etc. The main search results table shows 35 entries, each with columns for Name, Info, Location, Author, Owner, Creator, and Created Date. A filter sidebar on the right allows for further refinement of the search results.

Name	Info	Location	Author	Owner	Creator	Created Date
ABC Grandstand tweet...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
ABC Grandstand tweet...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
Afresco Share You ha...	Content	/Fred Performance Test/F...	admin@xenit.eu		admin	30/10/2015
Afresco Share You ha...	Content	/Fred Performance Test/F...	admin@xenit.eu		admin	30/10/2015
DocRef Generator Upd...	Content	/Fred Performance Test/F...	geens.toon@gmail.com		admin	30/10/2015
fed 3.0 Training.pdf	Content	/Customer Homes/Building...	Peter Morel		VanBelle	26/05/2015
fed Fred Backend Install...	Content	/Customer Homes/Building...	Toon Geens		VanBelle	02/06/2015
FV Business case-20...	Content	/Fred Performance Test/F...	Tom Lemmens		admin	30/10/2015
Kas Thomas tweeted ...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
Kas Thomas tweeted ...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
Mystery Double Cross (...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
Mystery Double Cross (...	Content	/Fred Performance Test/F...	Popular in your network		admin	30/10/2015
New document.docx	Fred Document	/Billing	Jessica Letourneau		VanBelle	12/10/2015
Notification Alfresco ...	Content	/Fred Performance Test/F...	Google Calendar		admin	30/10/2015
Notification Alfresco ...	Content	/Fred Performance Test/F...	Google Calendar		admin	30/10/2015
Overzicht problematiek...	Content	/User Homes/VanBelle/B...	Katelijne Gheysen		VanBelle	29/09/2015
Overzicht problematiek...	Content	/User Homes/VanBelle/B...	Katelijne Gheysen		VanBelle	29/09/2015
RE EP - powerpoint en...	Content	/Fred Performance Test/F...	Peter Morel		admin	30/10/2015
RE overzicht problema...	Content	/User Homes/VanBelle/B...	Katelijne Gheysen		VanBelle	29/09/2015
RE overzicht problema...	Content	/User Homes/VanBelle/B...	Katelijne Gheysen		VanBelle	29/09/2015
Re template rechten a...	Content	/Fred Performance Test/F...	geens.toon@gmail.com		admin	30/10/2015
Reminder to start your ...	Content	/Fred Performance Test/F...	Cisco WebEx		admin	30/10/2015
Reminder to start your ...	Content	/Fred Performance Test/F...	Cisco WebEx		admin	30/10/2015
Réponse automatique ...	Content	/Fred Performance Test/F...	Léopold Tubbax		admin	30/10/2015
Réponse automatique ...	Content	/Fred Performance Test/F...	Léopold Tubbax		admin	30/10/2015
SWMSUP-59-model.xml	Dictionary Model	/Data Dictionary/Models			admin	31/03/2015

Found 35 results: in '/Company Home' and having type folder or having type content and 'fred' or 'wilma' and created between 01/01/2015 and 16/11/2015 and text 'alfresco'

Filtering using facets.

As from version 5.0, Alfresco supports SOLR 4.x. This brings a new range of facet features to the surface. Facets allows you to filter the search result according the selection of the facet value you make.



With Fred 3.3 combined with Alfresco 5.0 you have now facet buckets available for dates and volumes.

The screenshot shows the Fred search interface with the following search parameters:

- Location: Company Home
- Type: Content and Folder
- (ALL) fred OR wilma
- Created Date: 01/01/2015 to 16/11/2015
- (FULLTEXT) alfresco

The search results table displays 11 items, including documents like "Fred Backend Installati...", "New document.docx", and "Overzicht problematiek...", along with folders like "BA VanBelle". The columns include Name, Info, Location, Author, Owner, Creator, and Created Date. A sidebar on the left shows facet buckets for Size, Type, and Date.

17.5 AND, OR AND () OPERATORS IN TEXT FIELDS

In text fields, you can use OR, AND and () operators to make an advanced search on a specific field.

The search interface shows the following query in the Name field:

$$(Fred \text{ OR } jenny) \text{ AND } tom$$

The behaviour in this field is as follows:

Input user	Presentation after pushing Enter	Search result
Tom Jerry	Tom AND Jerry	Tom AND Jerry
Tom OR Jerry	Tom OR Jerry	Tom OR Jerry
"Tom and Jerry"	"Tom and Jerry"	"Tom and Jerry"



Tom Jerry OR Goofy AND "Donald Duck"	Tom AND Jerry OR Goofy AND "Donald Duck"	((Tom AND Jerry) OR Goofy) AND "Donald Duck" (Tom AND Jerry) AND "Donald Duck" Goofy AND "Donald Duck"
Tom Jerry OR (Goofy AND "Donald Duck")	Tom AND Jerry OR (Goofy AND "Donald Duck")	(Tom AND Jerry) OR (Goofy AND "Donald Duck") Tom AND Jerry Goofy AND "Donald Duck"

17.6 MESSAGES IN SEARCH RESULT

The administrator can limit the search results on the Alfresco server. In case limits are triggered during the specific search action launched by the user, Fred will display a message that additional search results might be available.

Fred - Fred @ Lab - Mr Fred

File Window Help

Search Results >

Company Home Search Results

Location Company Home >

Type Content and Folder

(ALL) Fred

Categories

- Commission (25)
- Dossiers (24)
- English (10)
- Spanish (9)
- French (6)
- Energy (4)
- Dossier C (4)
- Pitcaim (3)
- EUROPE (3)
- Dossier A (2)
- Belgium (2)
- Review Report (1)
- Inspection Call (1)
- Switzerland (1)

Name

Displaying first 1030 results. Please refine your query.

Customer C

- enkel bij 2Compute (Commercieel informatie - 9710)-20100517-092622.msg
- enkel bij 2Compute (Commercieel informatie - 9710)-20100517-092622.msg
- Slim en de wapenindustrie in het Midden-Oosten-20110125-095023.msg
- Slim en de wapenindustrie in het Midden-Oosten-20110125-095023.msg
- \'Buitenlander zou België kunnen helpen\...-20110117-001536.msg
- \'Dag van de waarheid\...-20110104-001434.msg
- \'Geen perspectief op vooruitgang\...-20110027-001528.msg
- \'Geen perspectief op vooruitgang\...-20110027-001528.msg
- \'Ik zal in Libië sterven\...-20110123-001533.msg
- \'Ik zal in Libië sterven\...-20110123-001533.msg
- \'Intemetleider\' stookt Egyptisch vuur wat op-20110109-001700.msg

Preview

Metadata

Found 1030 results: in '/Company Home' and having type folder or having type content and 'Fred'

One can limit the time during which the search is executed and the number of results that are evaluated against access rights. If one of these limits set are met, search is stopped and the current result is evaluated against access rights and presented as the final search result.

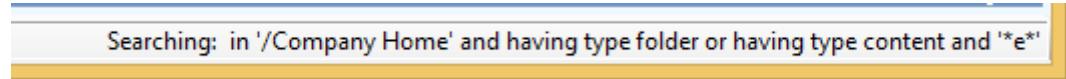
A message is displayed with an indication on how to proceed to get a better search result.

While executing a result, Fred is displaying multiple messages:

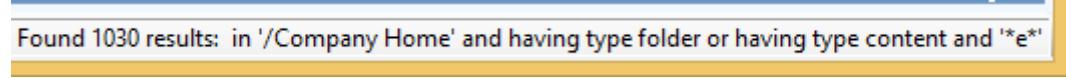


- At the left bottom:

While searching

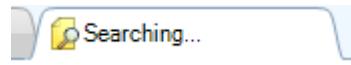
 Searching: in '/Company Home' and having type folder or having type content and '*e*'

When result is found

 Found 1030 results: in '/Company Home' and having type folder or having type content and '*e*'

- In the search tab:

While searching

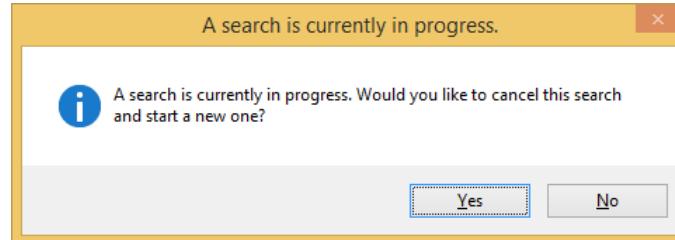


When the result is found



When you launch a new search while the previous search is still running:

- You will get a warning message



- If you confirm, then the running search will not be cancelled on the server but the result will not be presented in Fred. Instead Fred will present the result of the new search.

17.7 SEARCH IN A PART OF THE TREE STRUCTURE

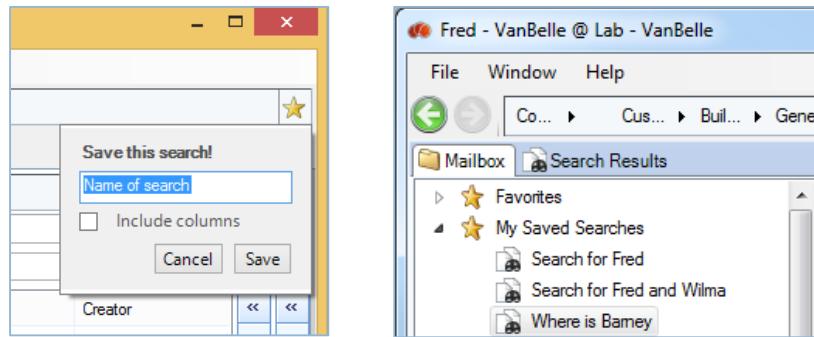
If you want to limit your search to a part of the repository, you can set the folder, in which you want to search. The search will be limited to the folder and its subfolders.

You can also select the Favourites folders as a location.



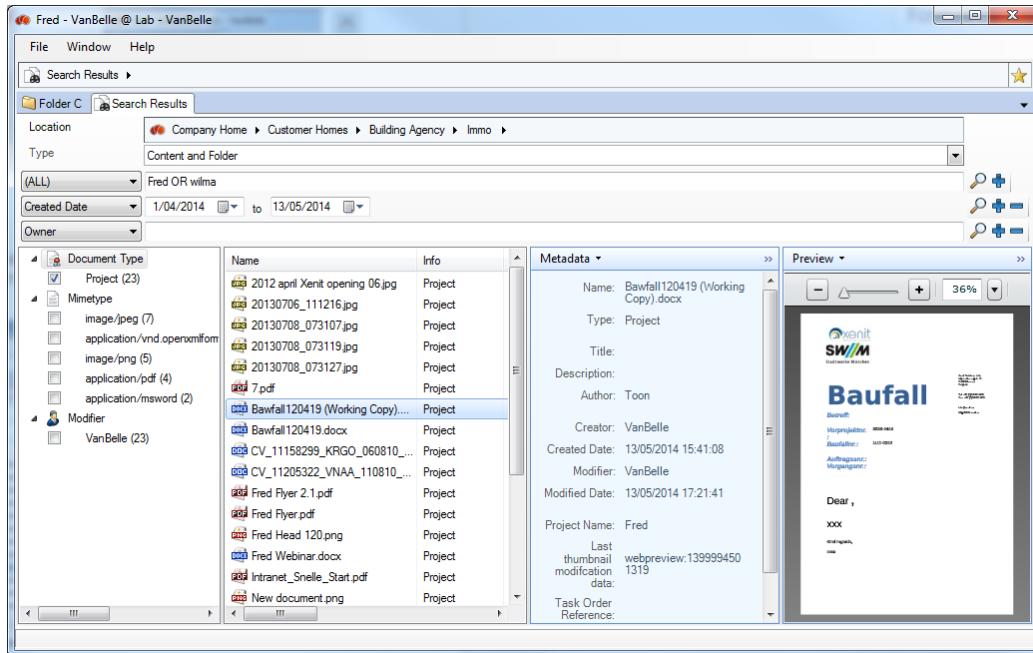
17.8 SAVED SEARCH

It is possible to save your current search by clicking on the star icon next to the search tab, usually in the upper right corner of the User Interface. Doing so, you can easily perform your search again in the future.



17.9 PREVIEW YOUR SEARCH

When you select a document displayed in the result list of a search, the meta-data is shown directly in the meta-data pane as well as a preview of the selected file.



17.10 FILTER ON COLUMNS

You can filter on the value in the column. You can add multiple values per column and you can put filters in different columns. The filter is set by selecting the value(s) and clicking "Add Filter".

The filter value is removed by clicking the value in the list of Active filters.



The screenshot shows the Fred search interface with a context menu open over a list of search results. The menu path 'Project Name' > 'Group by' is highlighted. A sub-menu 'Group by' is open, showing options like 'Alfresco', 'Barney', 'Fred', and 'Project A'. The main search results table has columns for Name, Info, Creator, Created Date, Modifier, Modified Date, Project Name, and Metadata.

17.11 GROUPING ON METADATA VALUES

You can group the search results on the values in one metadata field. Right click on the column header and select “Group by”.

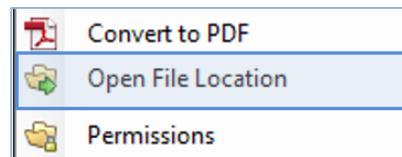
Remove the grouping by deselecting the metadata field in the list.

The screenshot shows the Fred search interface with a context menu open over a list of search results. The menu path 'Project Name' > 'Group by' is highlighted. A sub-menu 'Group by' is open, showing grouped results for 'Project Name: No Value', 'Project Name: Alfresco', 'Project Name: Barney', 'Project Name: Fred', 'Project Name: Project A', 'Project Name: SWM', 'Project Name: Trafigura', and 'Project Name: XeniT'. The main search results table has columns for Name, Info, Creator, Created Date, Modifier, Modified Date, Project Name, and Metadata.

17.12 OPEN FILE LOCATION

The search result is shown in a list view. Many of the file commands are available in the search pane.

Clicking “Open File Location” will show you the folder or file selected in the tree structure. This will allow you for example to find back the folder in which you have put a file and add a new file to the same folder.

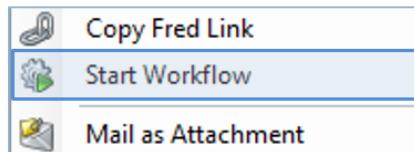




18 WORKFLOW

18.1 STARTING A WORKFLOW

In the repository you can launch a workflow from one or more selected content items, whether files or folders. Starting a workflow generates a workflow task for the persons who were assigned to the task.



- Navigate the library's folder structure to locate the item(s) you want to work with. These can be documents and/or folders.
- Select the item(s) of interest.
- Click Start Workflow.
- The Start Workflow tab appears.
- Expand the Workflow list and select the type of workflow you want to define.

Name	Location
Fred Webinar.docx	/Company Home/Custome...

The following preconfigured workflows are available:



Adhoc

Let's you assign a task to a single user

Group Review & Approve

Let's you set up review and approval of content, assigning the workflow task to a single group

Parallel Review & Approve

Let's you set up review and approval of content, assigning the workflow task to multiple users

Pooled Review & Approve

Let's you set up review and approval of content, assigning the workflow task to multiple users. One user can take ownership of the task at a time, completing it or returning it to the pool to be claimed by another user associated with the task.

Review & Approve

Let's you set up review and approval of content, assigning the workflow task to a single user

The appropriate workflow form displays where you enter the details of the workflow task being initiated. Required fields are marked with an asterisk (*).

- Provide the basic details for the workflow task in the Information section.
 - In the Description field describe what you want the recipient of the task to do, such as: "Please review the attached content". This text displays in the My Tasks table of the workflow overview for this workflow task. This content should clearly explain to the user what they are expected to do with the related content item(s).
 - Click the icon to the right of the Workflow Due field to specify the completion date for the task.
 - Select a Priority setting for the task.
- You assign the task to either a user or a user group depending on the type of workflow selected.
 - In the Assignee section type in the name of the user or group and push Enter. Fred will present a selection of users and groups which match your search criteria.

The screenshot shows a modal dialog titled 'Assignee'. It contains a list of users and groups, each with a small profile icon and their name in parentheses. The list includes:

- BA VanBelle (VanBelle)
- Dokter VDB (Dokter VDB)
- EVERYONE (GROUP_EVERYONE)
- Gabriel Vince (apogado)
- Ian Vanroosmalen (Ian)
- Karel Van Sweevelt (Karel)
- Laurent Van der Linden (laurent_van_der_linden)
- Luc Vannuffel (Luc)
- Merel Veracx (Merel)



- Click Select  to the left of a user or group to select it.
- For tasks with groups and multiple users you must complete the Required Approval Percentage field. Indicate the percentage of reviewers that must approve the task in order for the entire workflow task to be considered complete.
- Enable the Send Email Notifications setting in the Other Options section to have the application automatically send an email each time a task is assigned to a user as part of this workflow.

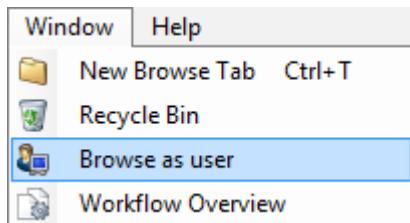
Tasks generated by the workflow will still appear in the user's My Tasks list in the Workflow Overview. The email is sent to the email address listed in the user's profile. If an address is not provided, no email will be sent.

For group and pooled tasks, every member of the selected group will receive the email notification.

- Click Start Workflow.
- The workflow task is created. A record will appear in the My Tasks list and the Workflows I've Started list of the appropriate users.

18.2 WORKFLOW OVERVIEW

The workflow overview provides you a view on the Tasks assigned to you and the workflows you have started.





Workflows I've started	Message	Started	Due Date
Group Review And Ap...	Group review Fred Demo	7/02/2014	12/02/2014
Review And Approve	Test Review and Approve	7/02/2014	9/09/2014
Review And Approve	Please review Boss MOM	12/02/2014	13/02/2014
Review And Approve	Demo Workflow. Graag ev...	5/05/2014	6/05/2014
Review And Approve	Please review the Webinar...	13/05/2014	16/05/2014
Send Document(s) For ...	Please revieww	7/02/2014	10/02/2014

Left upper pane is a list of all actions that are assigned to you.

Left lower pane is a list of all workflows you have launched.

Right pane provides a detailed view of the task or the workflow you have selected on the left side.

18.3 MY TASKS

The My Tasks list lets you view and manage the tasks that are assigned to you. You can sort the list of tasks by clicking on the column header. Selecting a task will show the details of the task in the right pane.

My Tasks	Description	Due Date	Priority
Adhoc Task	Adhoc Task		Medium
Adhoc Task	Please review and approve the User ...		Medium
Adhoc Task	Demo AVA		Medium
Approved	The document was reviewed and ap...	19/06/2013	Medium
Review	Please review this demo Italy DOcum...	8/05/2013	Medium
Review	Demo of Fred Workflow	8/07/2013	High
Review	Demo OCMW Temse		Medium

The summary provided for each task includes:

- current status of the task
- task type



- task name
- due date
- priority

18.4 EDITING A TASK

Each task is your responsibility and remains assigned to you until you manage it.

In the task list locate the task you want to work with and select it. In the right pane, the details of the Task are presented. The actions available on this page depend on the task type.

Manage the selected task in one or more of the following ways:

Update: If the task is in progress but not yet complete, you can change the task status and add a comment indicating your progress, then click Save and Close. The task remains assigned to you.

Approve or Reject: When you are done with a task you can update the task status, add a comment indicating the work done, and then click either Approve or Reject. The task returns to the user who started the workflow and no longer appears in your task list.



Claim: Click Claim to take responsibility for a pooled task. This action is available only for pooled tasks that are not yet assigned.





Release to Pool: Click Release to Pool to place a task back in the pool. The task then appears in the task list as Unassigned and can be claimed by another user. This action is available only for pooled tasks that are currently owned by you.



Task Done: Once a task is complete, it is returned to the user who started the associated workflow. Click Task Done to finish a task and remove it from your task list.



Once the selected action is complete the task will be removed from the My Task list. A new task will appear in the My Task list of the person that launched the workflow to confirm that the workflow has been completed.

18.5 OVERVIEW OF THE DOCUMENTS

It is possible to configure the metadata columns in the Items list and group the linked documents based on a metadata field value. In the below example, an invoice and related purchase orders are presented to the person that needs to approve the invoice. One can for example show the Total Amount related to the documents.

Task: Approve or Reject

Info

Type: Invoice Review
Owner: Identifier*: 11641 Priority*: Medium
Due Date:

Progress

Status*: Not Yet Started

Items

Name	Total excl. VAT	Transportcost
Info: 'Invoice in' (1)		
PDF Invoice1.pdf	100.00	10.00
Info: 'Purchase out' (2)		
PDF PO-example2.pdf		
PDF PO-example3.pdf		

Response

Comment:

Action Buttons

Claim Save Approve Reject

The ECM technical team can configure the Columns and the grouping.



18.6 WORKFLOWS I'VE STARTED

From the Workflows I've Started list, you can view the full details of a workflow, including a workflow summary, details on the most recently completed task, and a summary of all tasks generated by the workflow.

Screenshot of the 'Workflow Overview' application window titled 'Fred - VanBelle @ Lab - Vanbelle'.

The window displays the following sections:

- My Tasks:** A grid showing workflow items with columns: Description, Due Date, Priority. One item, 'Review', is highlighted with a red oval.
- Workflow: Please review the Webinar scenario:**
 - Info:** Type: Review And Approve, Started by: BA VanBelle, Workflow Due Date: 16/05/2014, Start Date: 13/05/2014, Workflow Priority: High, Status: Workflow is in Progress.
 - Items:** A table showing a single item: Name (Fred Webinar.docx), Location (/Customer Homes/Building ...).
 - Other Options:** Send Email Notifications: checked.
 - Diagram:** A BPMN diagram showing a flow from a start event to a 'Review Task' (highlighted with a red border), then to a decision diamond (X). From the decision diamond, two paths emerge: one leading to a 'Document Approved' end event and another leading to a 'Document Rejected' end event.
 - Current Tasks:** A table showing a single task: Review, Assigned to: VanBelle, Due Date: 16/05/2014, Status: In Progress.
 - History:** A table showing a completed task: Start Review, Completed by: VanBelle, Completed at: 13/05/2014, Status: Completed.

The summary provided for each workflow includes:

- workflow type
- workflow name
- date started
- due date



Workflows I've started	Message	Started	Due Date
Adhoc Workflow	Demo ad hoc - add content	29/05/2013	
Group Review And Ap...	Group Review And Approve	26/04/2013	3/05/2013
Parallel Review And Ap...	Parallel Review And Appro...	26/04/2013	2/05/2013
Pooled Review And Ap...	Pooled Review And Appro...	26/04/2013	1/05/2013
Pooled Review And Ap...	Test workflow	29/05/2013	31/05/2013
Review And Approve	Review And Approve	26/04/2013	30/04/2013
Review And Approve	This is a demo for PSI	16/05/2013	17/05/2013
Review And Approve	Please review the docume...	29/05/2013	31/05/2013
Review And Approve	Dem for Traf	23/05/2013	

Viewing a workflow lets you confirm you have selected the correct one before you cancel it.

In the list workflow I've Started select the workflow you want to review in detail.

The Details page appears displaying the information for the selected workflow.

Workflow: Please review and approve the User Manual of Fred

Info

Type: Adhoc Workflow
 Started by: BA VanBelle Workflow Due Date: Start Date: 25/04/2013 20:15:17
 Workflow Priority: Medium Status: Workflow is in Progress

Items

Name	Location
SubgroupBill.pdf	/Company Home/Customer...

Other Options

Send Email Notifications:

Current Tasks:

Task Type	Assigned To	Due Date	Status
Adhoc Task	VanBelle		In Progress

History:

Task Type	Completed By	Completed At	Outcome	Comment
Start Adhoc Task	VanBelle	25/04/2013	Task Done	

Current Tasks:



Overview of the open tasks related to this workflow. Clicking on a task in this list will provide you a detailed view of the task.

To return to the Workflow Detail view, click on

History:

Overview of the tasks that have been executed until now. Clicking on a task will provide you a detailed view of the task.

To return to the Workflow Detail view, click on

18.7 CANCELLING A WORKFLOW

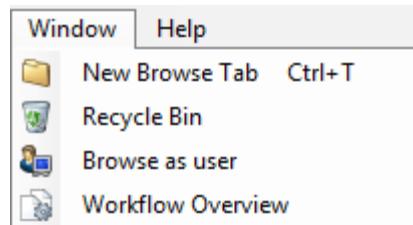
Cancel an existing workflow when it is no longer required. This deletes all tasks related to the workflow.

In the workflow list locate the workflow you want to cancel. In the Workflow details pane, click Cancel Workflow.

The selected workflow is cancelled and removed from the workflow list. All tasks related to the workflow are deleted, which removes them from the assignees' task lists.



19 ADDITIONAL USER FUNCTIONS



19.1 NEW BROWSE TAB

You can open multiple Browser tabs. Each tab will describe the active folder in the tab. You can also use the shortcut CTRL+T to open a new tab.

Name	Info	Invoice Reference	Paid
01 Letters	Folder		
02 Scope	Folder		
03 Plans	Folder		
04 Reporting	Folder		
Folder structure demo	Folder		
2012 april Xenit opening 11.jpg	Invoice	1234-8769	False
2012 april Xenit opening 12.jpg	Invoice	2431-5432	False
2012 april Xenit opening 13.jpg	Project		
20130708_073139_1.jpg	Project		
20130708_073139_2.jpg	Project		
20130708_073230.jpg	Project		
AUTO Didier Luthi est absent(e) (retour 21 11 20...	Fred Document		
Flower1 - Shortcut.jpg	File Link Object		
Flower3.jpg	Project		
Flower4.jpg	Project		
Flower6.jpg	Project		
Fred Flyer 2.1.pdf	Project		

19.2 RECYCLE BIN

The recycle bin enables you to restore deleted files and folders, similar to the Windows Recycle Bin.



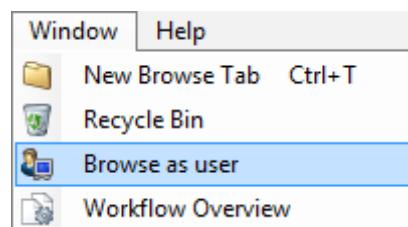
Name	Archived By	Archived Date
Demo Fred Video	VanBelle	7/02/2014 16:23:28
Folder structure demo	VanBelle	20/03/2014 15:24:00
Fred demo folder	VanBelle	7/02/2014 14:45:00
Province Vlaams Brabant	VanBelle	20/11/2013 22:33:21
Subsctructure	VanBelle	20/08/2013 13:47:06
Subsctructure	VanBelle	20/08/2013 13:52:25
Subsctructure	VanBelle	4/09/2013 10:38:57
Subsctructure	VanBelle	14/10/2013 10:04:03
Subsctructure	VanBelle	14/11/2013 20:19:14
Subsctructure	VanBelle	19/11/2013 12:03:46
testfolder	VanBelle	6/02/2014 18:21:57
dog 131105 lead 239414.d...	VanBelle	2/12/2013 10:19:29
JPG 20130708_073139.jpg	VanBelle	25/04/2014 10:51:11
JPG 20130708_073230.jpg	VanBelle	25/04/2014 10:51:11
XLS 2014-02-28 - XeniT Sol...	VanBelle	1/03/2014 9:48:31
JPG AA_Fred-Astaire-91909...	VanBelle	11/04/2014 9:10:33
DOC Alfresco-4.1-opzet.docx...	VanBelle	6/02/2014 17:53:43
PNG alfresco-logo-tagline-2....	VanBelle	1/03/2014 9:48:11

19.3 BROWSE AS USER

Only the general Alfresco ECM Administrator will have following functionality available.

Administrators can impersonate another user. The administrator can see what a user can see, to troubleshoot permissions, for example.

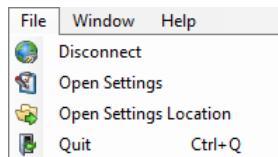
- Open the Windows Menu and click the “Browse-as-User”-command and a Browse as user tab will open.
- In the upper textbox, fill in the Alfresco username and click on “Switch User”.
- The specified user has at least consumer (=read) access to the folder structure and documents presented.





20 FRED USER SETTINGS

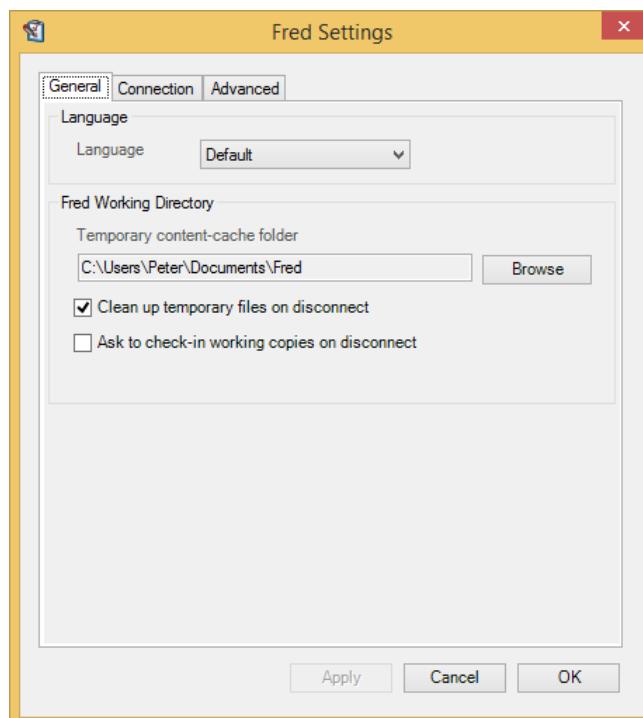
Fred allows you to configure following settings listed below. To change the settings, click on “File” and select “Open Settings”.

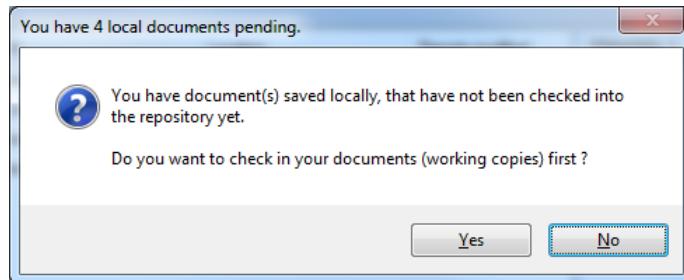


20.1 GENERAL

Localisation

- Fred will use by default the language set in Windows. You can set a specific language pack for the Fred user interface.
- Fred Working Directory is the folder used to download the working copies in the edit offline action.
 - The checkbox ‘Clean up Temporary files on disconnect’ activates the removal of temporary copies of downloaded files. As you continue to consult documents, temporary copies remain on your local drive and grow in volume.
 - The checkbox ‘Ask to Check in working copies on disconnect’ activates the message box which will ask you to check-in all working copies when disconnecting from the repository. This is handy when you are working on two computers and you want to move from one to the other.

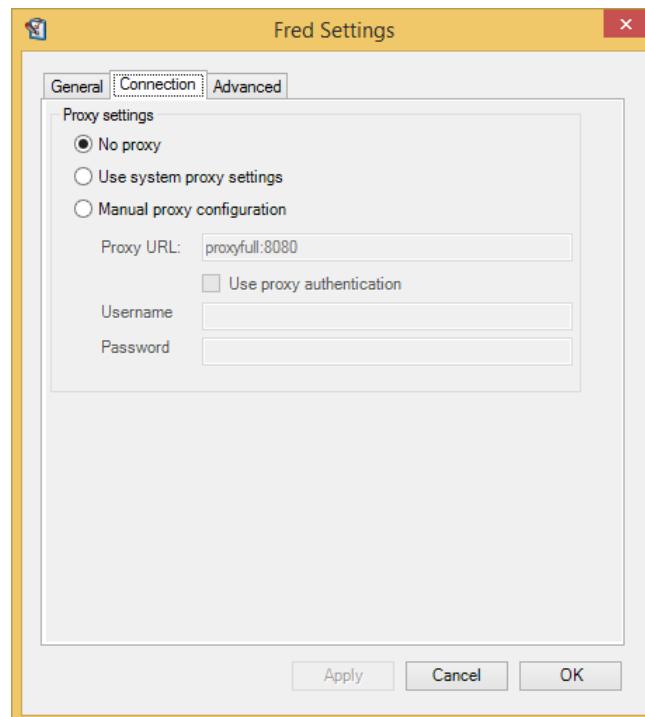




20.2 CONNECTION

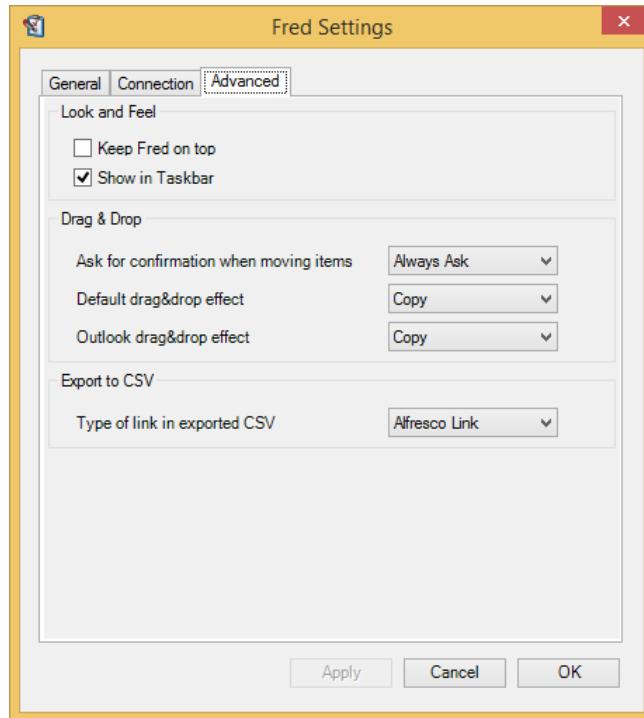
Proxy settings

- Fred is enabled to handle proxy configuration. Contact your administrator for more information.



20.3 ADVANCED

The settings in the advanced tab allow you to configure the behaviour of the Fred window.



Look and Feel

Keep Fred on top: keeps the Fred window on top of all application windows. This will allow you to drag and drop files from another application directly into the Fred window.

Show in taskbar: presents a Fred tab in the Windows taskbar, not only in the system tray. Right mouse click on the icon will provide a command menu.

Drag & Drop

Drag & Drop: Allows you to configure confirmation prompts and which default action should take place when performing a drag and drop from the Windows desktop and Explorer or the MS Outlook application.

Drag & Drop

When you export metadata from the navigation details or the search details, you can select to copy the Alfresco or Fred link of the object as first column in the csv list. As such, you can jump to the object from the list.



21 ENTERPRISE CONFIGURATION CAPABILITIES

Fred has multiple corporate configuration capabilities. The IT team can adapt the configuration files and modify the behaviour in the user interface.

21.1 CONFIGURATION OF METADATA PANNEL

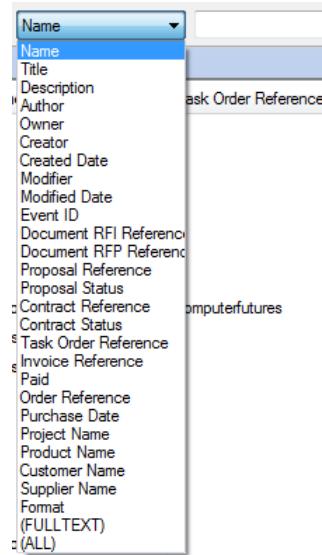
One can define which fields are presented in the metadata view and edit pane. One can define the layout of the fields that are presented. Below is an example how you can collapse a number of fields which might be less relevant in the day to day activities.

21.2 CONFIGURATION OF CONTEXT MENUS

It is possible to adapt, reorder and extend the context menus in the Fred User Interface.

21.3 CONFIGURATION OF SEARCHABLE PROPERTIES

One can configure the list of fields that will be made available in the search field drop down.



One can also configure which facets are presented in the search results.

21.4 CONFIGURATION OF METADATA BEHAVIOUR AT CREATION OF DOCUMENTS

At the creation of a document from a template, one can determine the behaviour of the metadata. For example:

- metadata will have to be provided afterwards

or

- metadata will have to be provided before the creation. This metadata can then be used as field values in the document. Example status of the document (draft, approved), date of the meeting, ...



22 GENERAL

22.1 INTEGRATION WITH 3RD PARTY APPLICATIONS:

It is possible to integrate 3rd party applications in the Fred user interface. The 3rd party application must be installed separately in your network environment.

Two application have been integrated with the Fred User Interface:

- ViewOne preview and annotation application of Daeja
- PDF Digital Signature application

The command in the file menu will launch the application. The file is send to the application and a new Tab is opened providing a view on the 3dr party application.

Detailed description of the screenshot: The screenshot shows the Fred application window. At the top, there's a menu bar with File, Window, Help. Below it is a toolbar with Mailbox, Search Results, and Digital Signature tabs. The Digital Signature tab is active. In the center, there's a preview area showing a document titled 'PHYSICIAN CONTRACT-APPLICATION'. The document contains fields for 'LAST NAME', 'FIRST NAME', 'CITY', 'ZIP+4', 'MAILING ADDRESS', 'CITY', 'ZIP+4', and 'E-MAIL ADDRESS'. On the left side of the window, there's a sidebar with 'General options' expanded. Under 'Signature placement', 'Place' is selected. Under 'Signing reason', 'Demo Fred' is entered. Under 'Contact information', 'Skype' is selected. There are checkboxes for 'Verified signature' (checked) and 'Use timestamp' (unchecked). At the bottom of the sidebar, there are language tabs for ENG and ESP, and a 'Sign' button.



22.2 LOCAL PERSISTENT CACHING

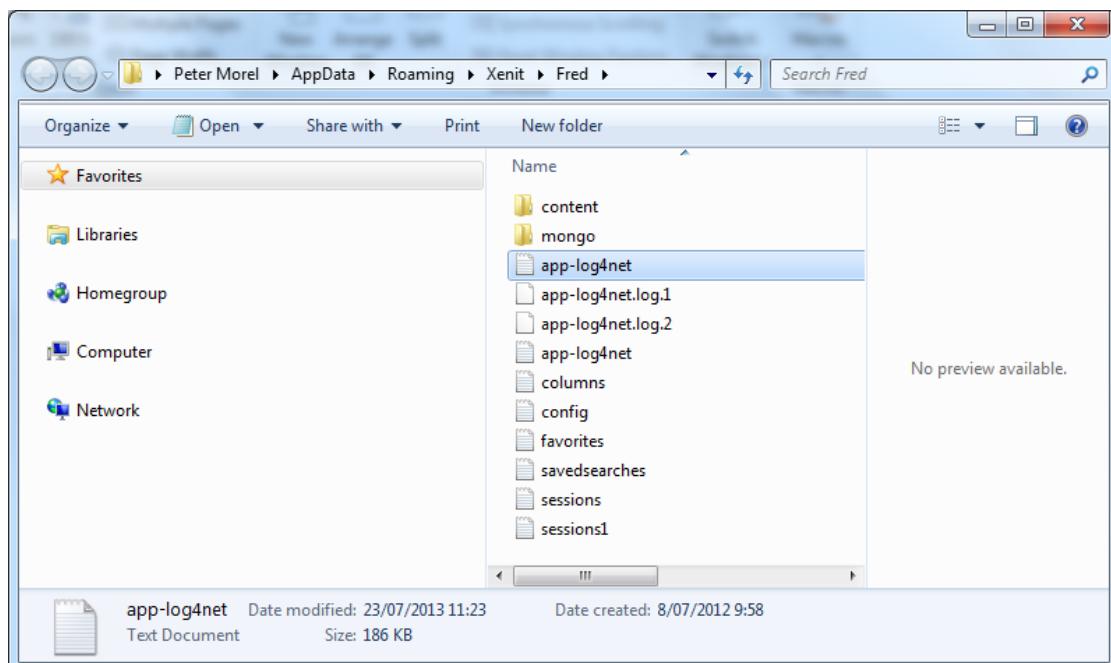
Fred provides persistent local caching of the metadata. As you browse the repository, metadata are cached and remains available to obtain a faster navigation and search experience. The cache is refreshed regularly as you navigate and search through the repository. You can at any moment force to refresh the cache by clicking F5 or the Refresh command.



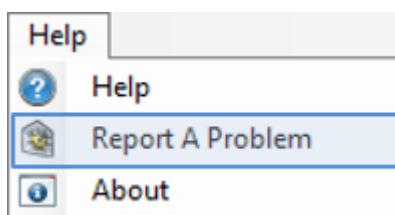
23 REPORTING A PROBLEM

When a problem occurs, you can report it to your local IT helpdesk or to support@xenit.eu. The Fred team will be able to help you faster if you are able to provide following information:

- A description of your desktop environment: Windows version, application version
- The Fred version
- A description of the problem
 - A screenshot is very helpful
- Log files: you can find the log files by “Files/Open settings location”.
 - A list of log files appears. Attach the log files app-log4net.log and app-log4net.log1 to your report



To help the user to report a problem, a ‘Report a problem’ command has been added to the Help menu.



Clicking this command will open your default mail application and attach the log files to it. You need to complete the description of the use case and send it off to your Fred support team.