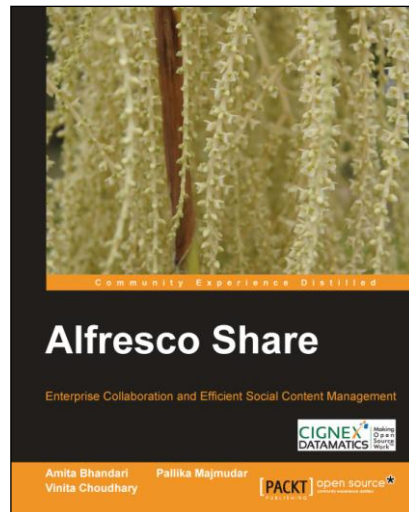


# Alfresco Share

**Amita Bhandari**  
**Vinita Choudhary**  
**Pallika Majmudar**



## **Chapter No. 7** **"Document Library"**

## In this package, you will find:

A Biography of the authors of the book

A preview chapter from the book, Chapter NO.7 "Document Library"

A synopsis of the book's content

Information on where to buy this book

## About the Authors

**Amita Bhandari** is a Senior Consultant at CIGNEX Datamatics. She has extensive experience in implementing Enterprise Web Applications using J2EE technologies. For the past 5 years at CIGNEX Datamatics, she has rolled out numerous Alfresco deployments world-wide in the areas of Document and Web Content Management.

She has trained many students in advanced Java technologies. She has worked with clients in media, gaming, healthcare, and e-governance. She worked on performance tuning projects, where Alfresco was deployed in a clustered and load balanced environment. She has implemented Single Sign On for easy communication between two systems. She is an experienced trainer on Alfresco.

She holds a Masters in Computer Applications from Rajasthan University, India. She has authored two technical books on open source CMS *Alfresco 3 Web Content Management*, *Alfresco 3 Enterprise Content Management* and has also worked as a Technical Reviewer for the book titled *Alfresco 3 Web Services*.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

**Vinita Choudhary** is a Senior Consultant at CIGNEX Datamatics. She has extensive experience in working in a variety of environments with cross-functional, multi-cultural teams.

Vinita is a Business Analyst with extensive experience of having provided recommendations for upgrade to accommodate client product and solution offerings in the short and long term, as well as providing a future solution roadmap. She is involved in providing pre-sales support to the sales team and is actively involved in various pre-sales activities. She has gathered experience in working with clients from a variety of cross-functional domains. She has been a keen contributor to the company blog and has also prepared a variety of marketing collaterals like case studies, whitepapers, technical and corporate presentations.

She holds a Masters in Computer Applications degree from Gujarat University, India. She has co-authored two books titled *Alfresco 3 Enterprise Content Management* and *Alfresco 3 Web Content Management*.

**Pallika Majmudar** is a Senior Consultant at CIGNEX Datamatics. She has strong hands-on experience in Java-based technologies, such as J2EE, Object-oriented Architecture and Design Patterns, Frameworks, web services, and web scripts.

She has architected and led many content management projects for customers in the USA, Hong Kong, Singapore, and India. She has implemented Alfresco based solutions for clients across verticals like media, healthcare, hi-tech, and communications.

She has earned a Masters degree in Computer Applications from Gujarat University, India. She has co-authored two books on Alfresco titled *Alfresco 3 Web Content Management* and *Alfresco 3 Enterprise Content Management*.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

---

We thank our CEO Paul Anthony and all the employees of CIGNEX Datamatics for making this book a reality. We would like to thank Manish Sheladia, Chief Delivery officer; Munwar Shariff, Chief Technology Officer at CIGNEX Datamatics and Veilumuthu Ramanathan, Vice President - Delivery for their encouragement and continuous support.

Our consulting team at CIGNEX Datamatics helped us with real-time examples which provided us better user perspective. We are thankful to them. We thank our sales, presales, inside sales and marketing teams for giving us an opportunity to provide Alfresco based solutions to many customers.

We sincerely thank and appreciate Usha Iyer, Acquisition Editor at Packt Publishing for giving us the opportunity. We thank Shreerang Deshpande, Lead Technical Editor; Shubhanjan Chatterjee, Project Manager and to the entire team at Packt Publishing. It is a pleasure working with them.

Our special thanks to our families and friends.

---

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

# Alfresco Share

For a while now, we have been hearing a lot about collaboration in Enterprise space. We speak day in and day out to our customers who have recognized the need to have a tool for use within their organization for better and efficient collaboration. We talk to customers who have done implementations of proprietary software, and have faced all kinds of challenges including vendor lock-in, rigid code base, and expensive upgrades. In our previous book, *Alfresco 3 Enterprise Content Management*, we had first introduced Share. Alfresco had just introduced its collaboration tool back then. The aim clearly was to provide an open source alternative to Microsoft SharePoint, Documentum, Interwoven, and similar software. It is, after all, the most popular open source Java based CMS with over 1.5 million downloads, 50,000 live sites, 74,000 community members, and with more than 150 application extensions in forge.

Share has since evolved and has become a competent tool for collaboration functions within an enterprise. The impressive roadmap which Alfresco provides promises an exciting possibility as it is created using completely open standards. We at CIGNEX Datamatics have implemented Alfresco for many enterprises. We became the Platinum System Integration partner of Alfresco. As part of our implementation, we also train our customers, so that they are equipped with all the information required to manage their systems. We have trained many users, administrators, and developers in Alfresco. This book distils the hands-on approach of our training courses into a concise, practical book.

We have taken a sample and tried to build a case study around it to provide an easier, practical understanding of Alfresco Share. There are step by step examples. We have explained how the out-of-the-box features can best be made use of, as well as the other options that are available, and how they fit into the overall picture. Our aim is to help you take advantage of this book by setting up an efficient and an effective collaboration system for your company and customers.

Your feedback is very valuable to us. You can contribute by reporting any errors you find in the book, making suggestions for new content that you'd like to see in future updates, commenting, and blogging about it.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

## What This Book Covers

*Chapter 1, Building a Corporate Collaboration Strategy* includes an overview of Share and how best it can fit your requirements. It explains various use cases of using Share for your document management, records management, web content management, and collaboration requirements, and also a future roadmap.

*Chapter 2, Installation and Configuration* includes tips to choose the right installation for you, and also installation of the software and explains how we start using it.

*Chapter 3, Alfresco Share Architecture* describes how Alfresco Share is built on top of Spring Surf and is intimately connected with this infrastructure technology. It talks about different types of web script used in Share and the flow of accessing the Repository using the web script. It also focuses on how the content is stored in the Alfresco Repository and helps in understanding Share Configuration Architecture.

*Chapter 4, Administering Share and Configuring Authentication Access* describes how Share Administrators are able to manage user access in Alfresco Share. Users will learn that Alfresco can be integrated easily into a variety of authentication systems. It also describes various administrative features like Node browser, manage deleted items, publishing of content, and various Repository features.

*Chapter 5, Managing and Configuring a Site* talks about managing Alfresco Share content and collaborating data related to a project, or area of interest, that is grouped together into something called a site. It explains about managing the site and membership of users. It will also give an introduction about the different themes that can be used for building a site. It describes the dashboard entry page similar to that of the user dashboard, which contains information specific to the site. This chapter explains how site managers are able to customize the site dashboard.

*Chapter 6, Collaboration Features in Share* talks about a number of built-in social media collaboration tools, like wikis, blogs, and data list entries and how project members can contribute content and share their expertise with other site members by creating entries on the site wiki, blogs, and so on. It also explains the features like creating events and managing them, various links, and discussion forums.

*Chapter 7, Document Library* includes using Alfresco as a smart document library; automatic version tracking and control. Folder creation, document uploading, content permissions, and access are explained.

*Chapter 8, Implementing Workflow* explains how business rules can be applied to documents within the document library to automate the movement of documents through business processes. The automated flow of documents through complex business processes and how it can be initiated from within Share is also detailed.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

*Chapter 9, Configuring Share* helps users to manage customization easily and also describes some of the advance configurations for site management.

*Chapter 10, Packaging and Deploying Share* explains how to set up a development environment. It also talks about project structure to be followed in Share and different approaches for deploying custom code.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

# 7

## Document Library

Locating information is crucial to carrying out enterprise tasks successfully. Often, at times the delay, or lack of such information, causes communication problems between employees in the same organization. This is because they do not have easy access to the documents and the information that they need. Usually, there are paper and electronic documents and there is no single point that informs what is where.

Over time the number of documents keeps increasing. Not categorizing or classifying these documents does not help. Storage and indexing of these is important for the timely use and location of the documents.

Poor document management can lead to a significant loss of time.

Alfresco Share has a document library function to cater to the wide ranging document library capabilities. The Document Library page component enables you to store and collaboratively manage any content related to a site, such as documents, media files, and graphics.

By the end of this chapter you will have a clear idea of the following:

- Creating and managing documents
- Versioning
- Tagging documents
- Ways to access the document library

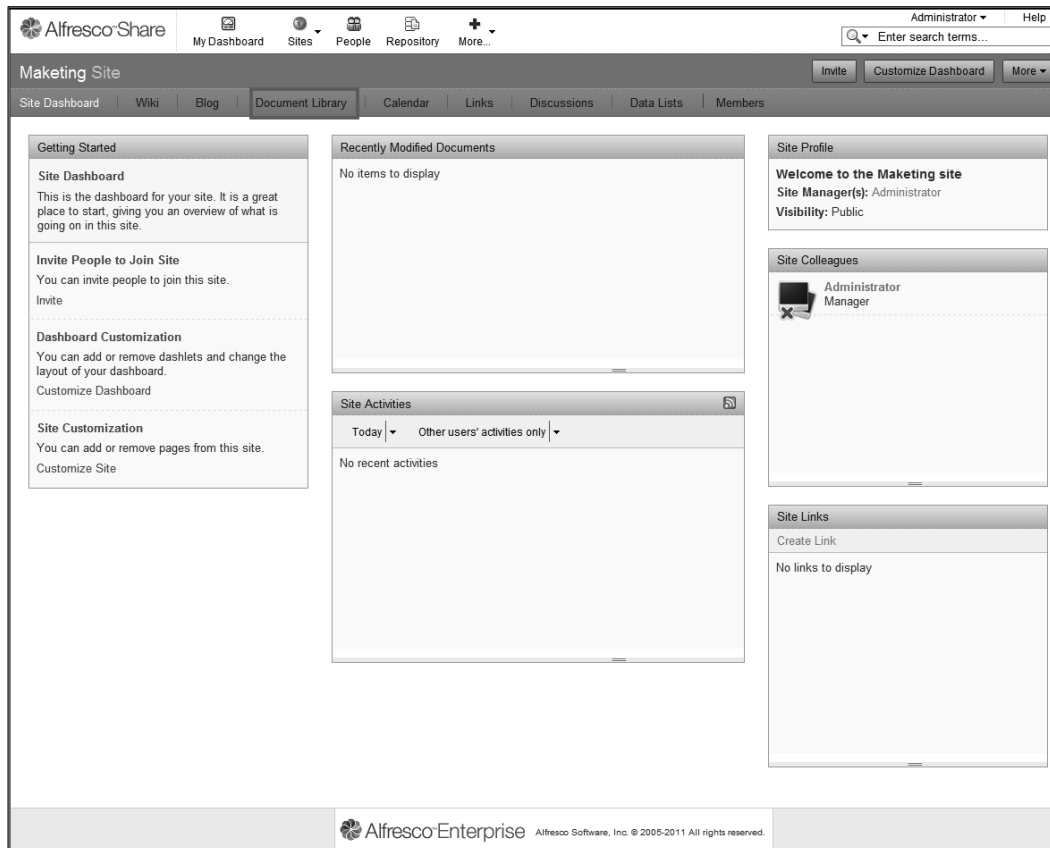
**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

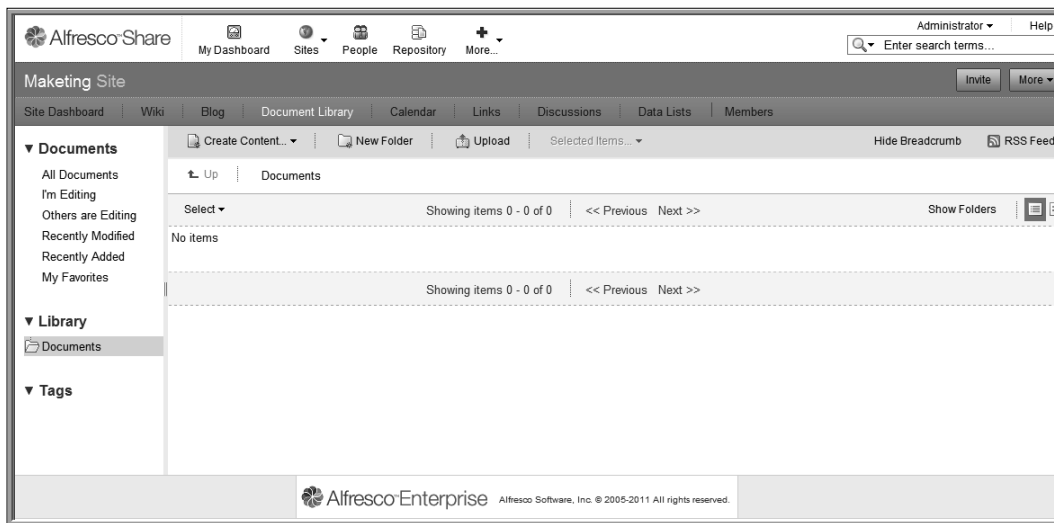


## The Document Library page

When the user clicks on and opens the site page, the document library is a tab on the top navigation:

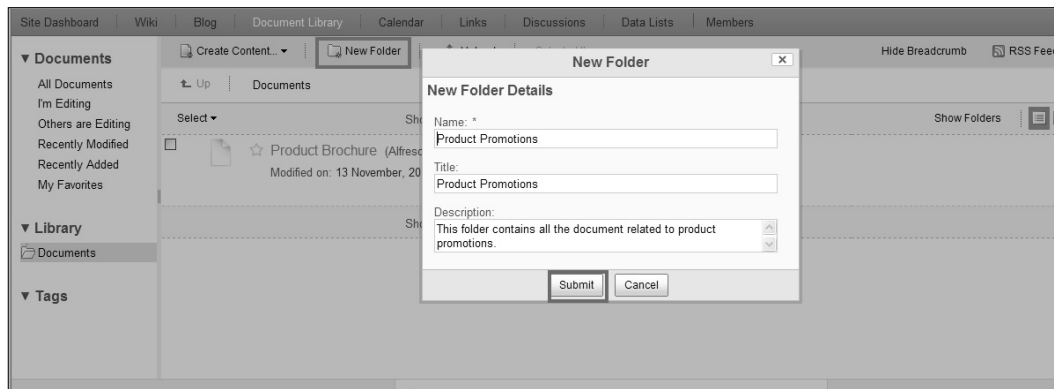


Clicking on the **Document Library** tab opens up the document library page. This page allows the user to create content, upload content from the system, view recent, and user's own documents. The tags that have been used for the various documents in the library are listed too. Users can also see the document library structure, as per the access and permission they have. This document library structure is a tree like structure that lists the folders and the subfolders present:



## Creating folders and folder hierarchy

Users can also create folders and sub folders if they have the permission to do so. To create a folder, the user needs to click on the **New Folder** tab on top:



A new folder pop up page opens. Fill in the details for the new folder and click on **Submit** to create the folder.

The new folder is now listed in the document library's folder structure. To create/upload a document in a folder, select the folder and then either click on **Create content** or **Upload**.

To create a sub folder within a folder, click on the folder name and then select the **Create folder** button. The steps to create the sub folder are the same as when creating a folder. The new folder created will be placed within the folder that was selected.

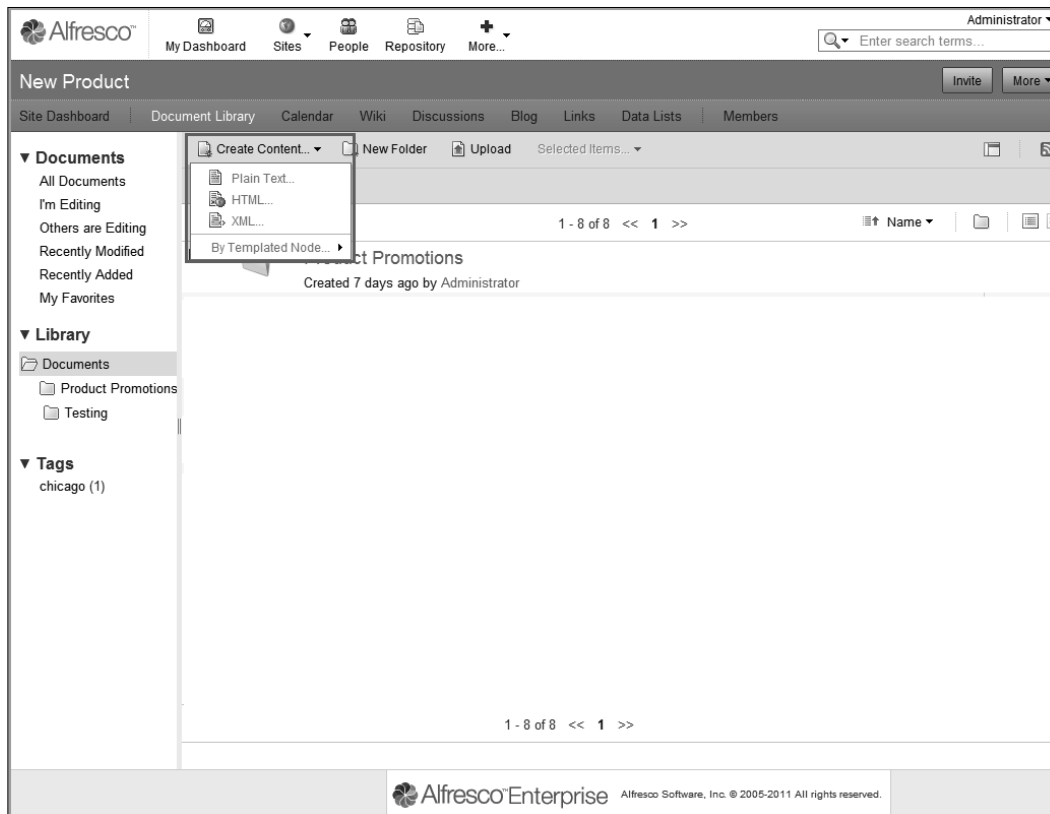
## Uploading files and creating documents

Content and information can be stored in the document library. This information can be stored in the library by creating the content in the Share interface, or by uploading a pre-existing content from the user's own system.

We shall first look at creating content in Share.

## Creating content in the Document Library

To create content in the Share Document Library, click on the **Create content** tab at the top:



Users can select the kind of content they want to create by selecting from the drop down. They can choose from plain text, HTML, and XML. For this example, we shall create plain text content. You can also create Google Docs spreadsheets, presentations, and documents.

1. Select plain text from the drop down. This will open a page that allows users to create content.
2. The following page opens up:

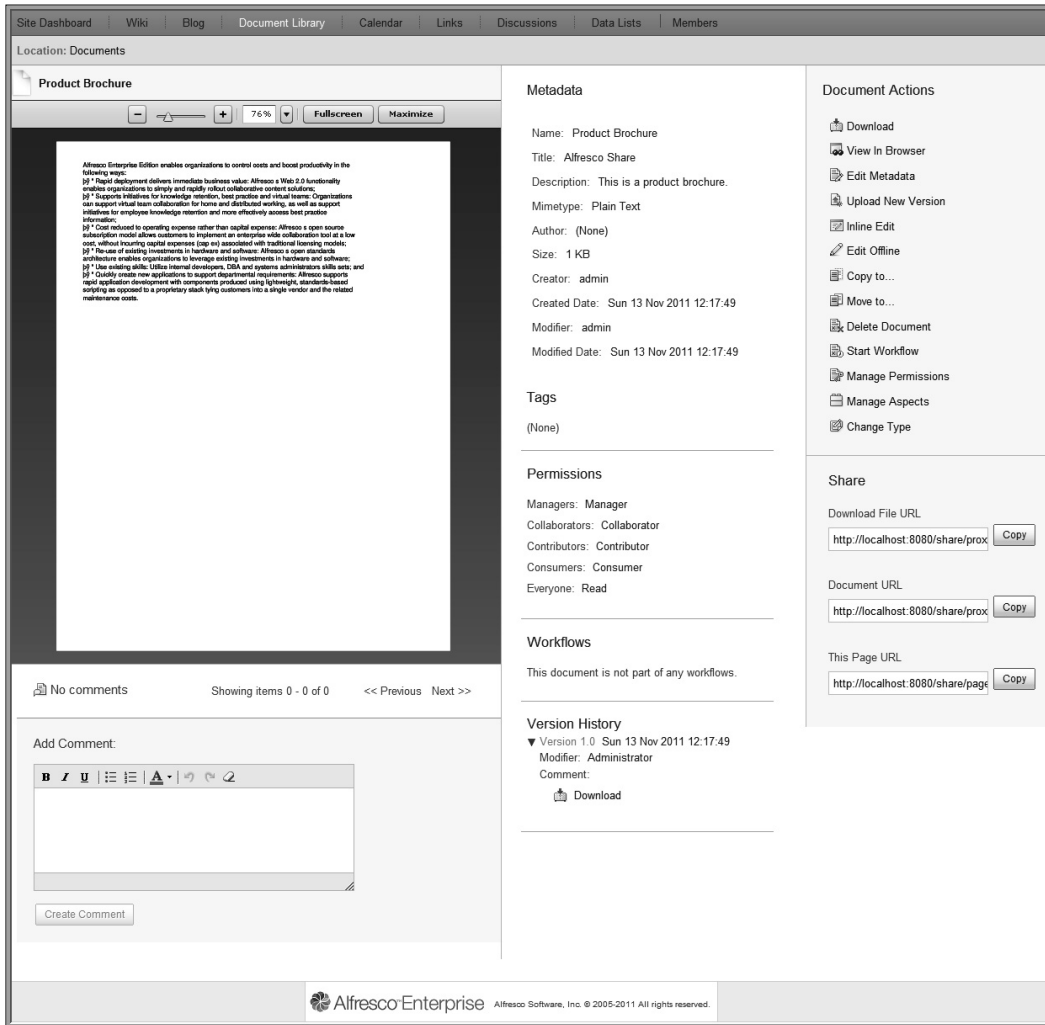
The screenshot shows the 'Create Content' form in Alfresco. The navigation bar at the top includes links for Site Dashboard, Wiki, Blog, Document Library, Calendar, Links, Discussions, Data Lists, and Members. The form title is 'Create Content' with a note '\* Required Fields'. The form contains the following fields:

- Name: \***: Product Brochure
- Title:**: Alfresco Share
- Description:**: This is a product brochure.
- Content:**:
  - Alfresco Enterprise Edition enables organizations to control costs and boost productivity in the following ways:
  - Rapid deployment delivers immediate business value:
  - Alfresco's Web 2.0 functionality enables organizations to simply and rapidly rollout collaborative content solutions;
  - Supports initiatives for knowledge retention, best practice and

At the bottom of the form are 'Create' and 'Cancel' buttons.

3. Users are required to fill in the fields to create content. The only mandatory field on this page is **Name**. Users can create a blank content and come back later and fill in the rest of the fields. The Name does not support the following special characters: \* " < > \ / . ? : and |. When the name contains a disallowed character the **Create** button is disabled.

4. Click on **Create** to create the content. If you do not want to create the content, then click on **Cancel**:



5. The page that comes up shows the various document details and a document preview.

The metadata associated with the document created are listed. Any changes to these can be done via the **Edit Metadata** action in the **Document Action** section.

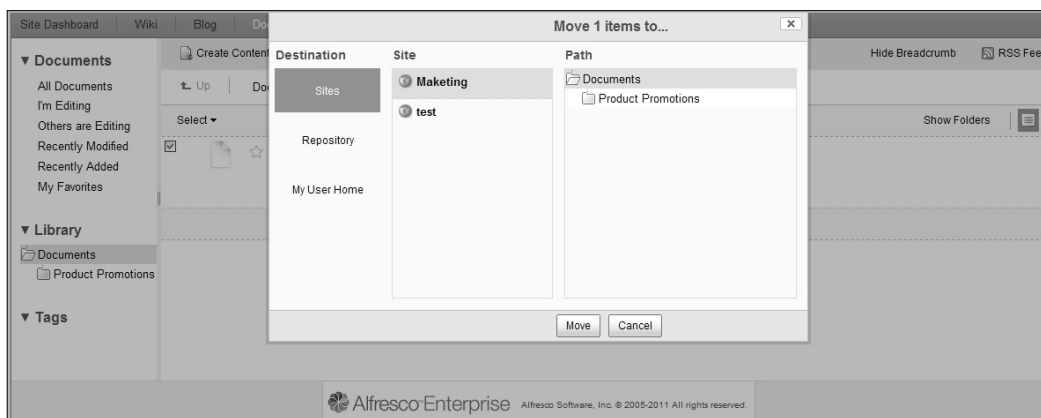
The document tags, permissions, workflows, versions, and so on are all listed too. These can also be changed from the Documents Action section.

**For More Information:**  
[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

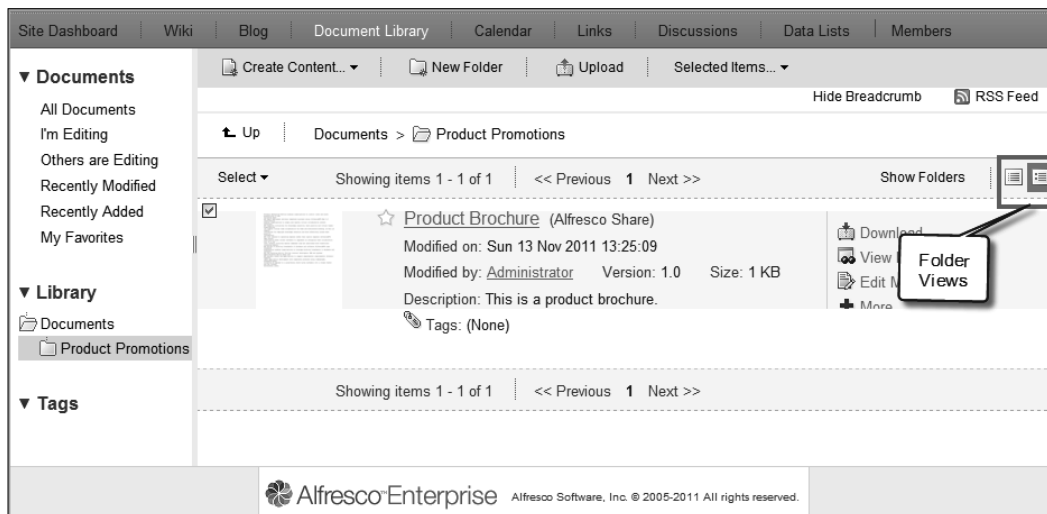
This content is currently in the root folder of the document library. You can also move, copy, and delete the document. Users can also manage permissions at the document level and assign the document to a workflow.

For all of the preceding actions, click on the checkbox beside the document name and select the document. This will make the **Selected Items** tab active. Clicking on the **Selected Items** tab will give a drop down list that lists the various actions that can be performed on a document.

To move the selected document to another folder, click on **Move to**. This will open a page that lists the folders and you can select the folder you want to move the document to:



After selecting the folder where you want to move the document, click on the **Move** button to move the document or on **Cancel** to cancel the action:



The document is now a part of the **Product Promotions** folder. Furthermore, the document inside the folders can have two kinds of views, simple and detailed view. These views can be seen by selecting from the folder views, as highlighted in the previous image.

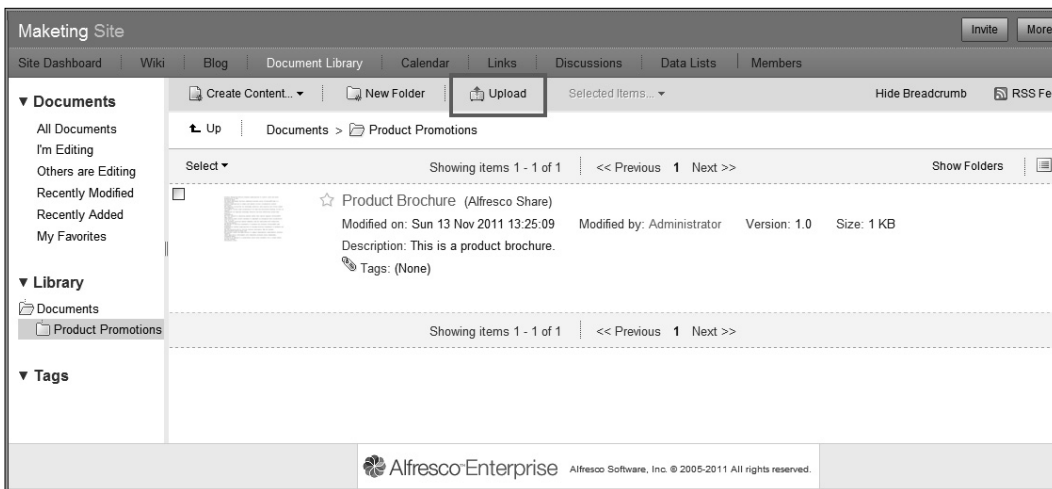
The simple view gives an icon besides the document to indicate the type of document, MS Word, PDF, or any other. It also gives the details of the creator of the document and the date on which it was created. The detailed view gives a thumbnail image of the document. Besides the information in the simple view, the detailed view also informs of the version, size, document tags, and a description of the document.

The documents in a folder are listed in a paginated manner. Furthermore, on mouse over on a document, or on selecting a document, the various document actions available are listed.

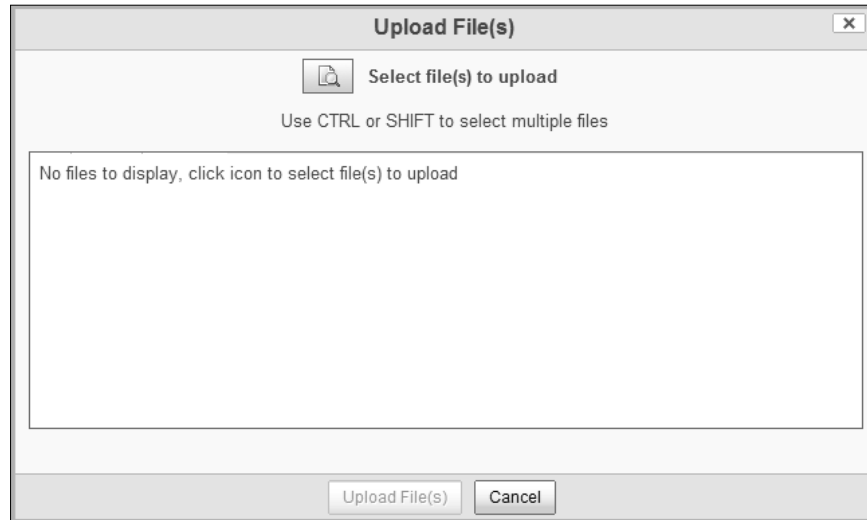
## Uploading Content in the Document Library


Content that already exists in the user's system can also be uploaded into the document library. Alfresco provides a built-in flash uploader. This requires installation of Adobe Flash player on your machine. If the flash player is not installed, then multi-file uploading is not possible and an HTML file uploader takes its place and lets you upload documents, one at a time.

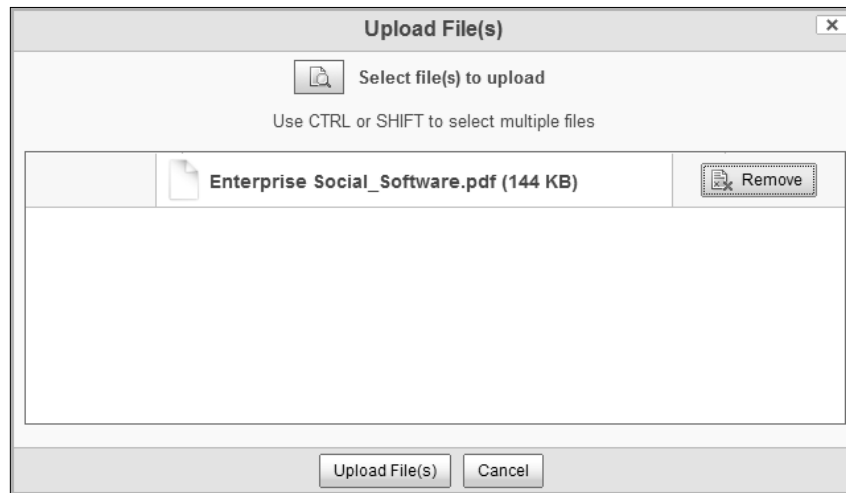
1. Click on the **Upload** tab in the document library, as follows:



2. A new pop up window opens up which allows users to upload documents. Users can upload a single document or multiple documents:



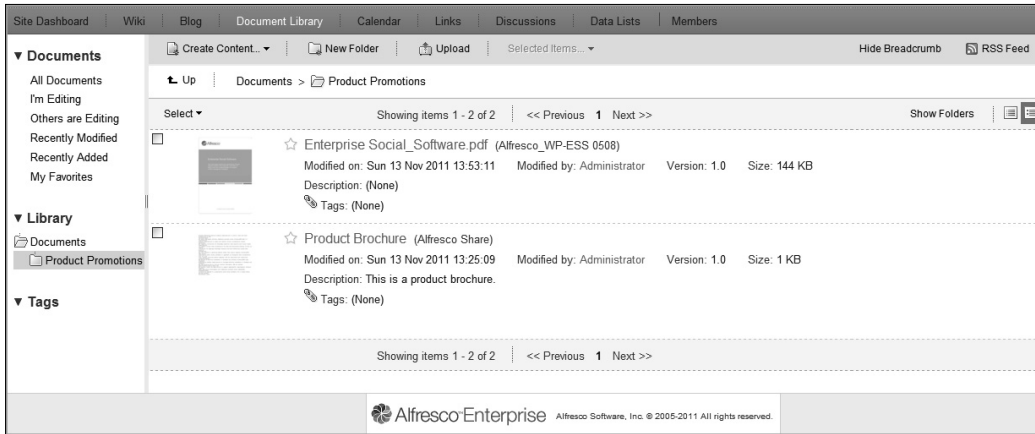
3. Click on the  icon to upload existing file(s) from the system. Users can browse the system and locate the files to be uploaded, as shown in the following screenshot:



4. Click on the **Upload File(s)** button to upload existing file(s) from the system.

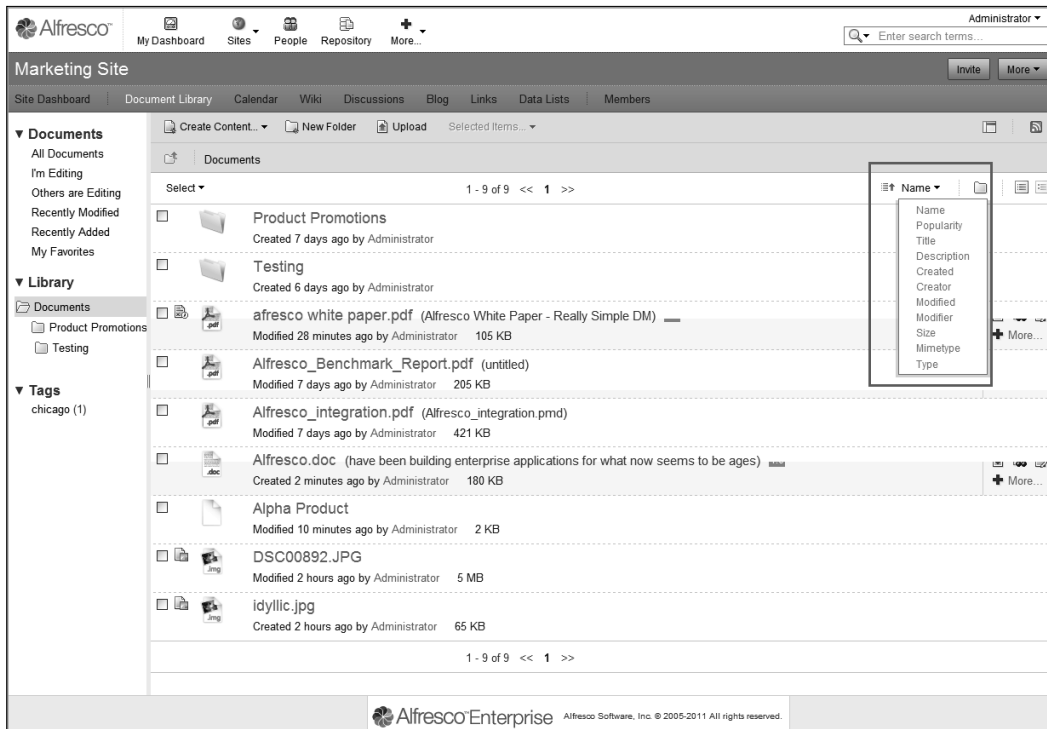


- The document is now a part of the document library and is in the folder that was specified, as follows:



### Sorting Content in the Document Library

Alfresco provides a feature of sorting the content of the document library based on different sorting parameters:



**For More Information:**  
[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

Some of the parameters for the sorting are name, popularity, description of the document, creator of the document, date of creation, size, and so on.

## Document details page

The document details page gives all the relevant information about the document. This page gives a bird's eye view of the document, associated metadata and tags, permissions, discussions around the document via comments, various document actions that can be carried out, associated workflows, and version history.

This page has a flash previewer for previewing the document. The preview also allows for a custom zoomed view of the document.

Various document access URLs are also mentioned.

The metadata associated with the document are listed in the metadata section.

## Document Library

Users access the document based on the roles and permissions defined for the document in the **Permissions** section on the page:

The screenshot displays the Alfresco Document Library interface for a document titled "afresco white paper.pdf". The document is currently at version 1.0, which is the "Current Version". The document preview shows a white paper titled "REALLY SIMPLE DOCUMENT" by Alfresco, featuring an interview with a series of podcasts and white papers. The interface includes a navigation bar at the top with options like "Site Dashboard", "Document Library", "Calendar", "Wiki", "Discussions", "Blog", "Links", "Data Lists", and "Members". A "Document Preview" callout points to the document viewer. On the right side, there are several panels: "Document Actions" (Download, View In Browser, Edit Properties, Upload New Version, Edit Offline, Copy to..., Move to..., Delete Document, Start Workflow, Manage Permissions, Manage Aspects, Change Type, Publish), "Tags" (None), "Share" (Copy this link to share the current page, http://share4book.cignex.com/share/page/site/new-product/docun, copy link to share this page), "Properties" (Name: afresco white paper.pdf, Title: Alfresco White Paper - Really Simple DM, Description: (None), Mimetype: Adobe PDF Document, Author: ihowells, Size: 125 KB, Creator: admin, Created Date: Mon 09 Jan 2012 15:14:40, Modifier: admin, Modified Date: Mon 16 Jan 2012 14:35:51), "Permissions" (Managers: Manager, Collaborators: Collaborator, Contributors: Contributor, Consumers: Consumer, All Others: Consumer), "Workflows" (This document is not part of any workflows), "Version History" (Latest Version: afresco white paper.pdf, Administrator 7 days ago, No Comment; Older Versions: This document has no previous versions), and "Publishing History" (This document has not been published). At the bottom, there is a footer for "Alfresco Enterprise" with copyright information: "Alfresco Software, Inc. © 2005-2011 All rights reserved."

## Comment on a document

Users that have the permissions to access the document can add their comments on the document.

1. To add a comment, write your comment in the **Add Comment** section, as follows:

2. Click on the **Create Comment** button.
3. The comment is added in the list of comments on the page, as follows:

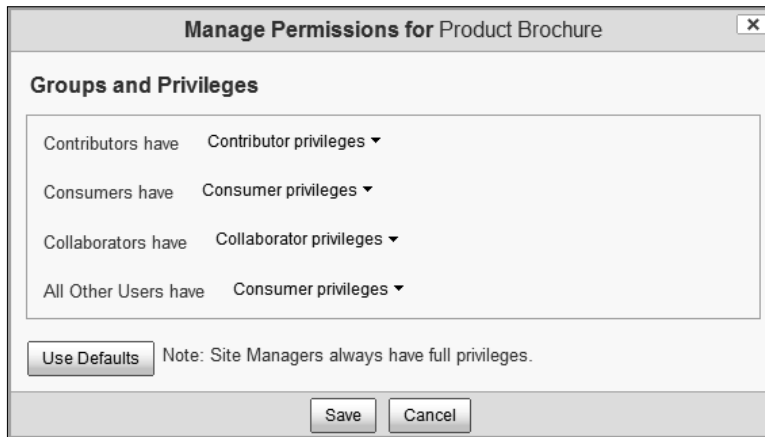
4. The creator of the comment can also **Edit** or **Delete** the comment.

## Permissions

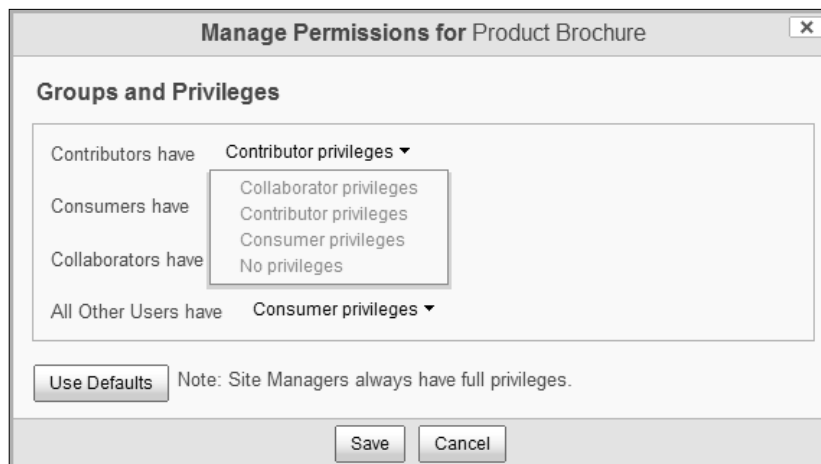
Users can allow user permissions on a document based on their roles. By default, Alfresco Share has four roles in addition to an Everyone role. The various roles have been discussed in a previous chapter.

To manage permissions for these roles the user should click on **Manage Permissions** in Document Actions.

This will open the following pop up window:



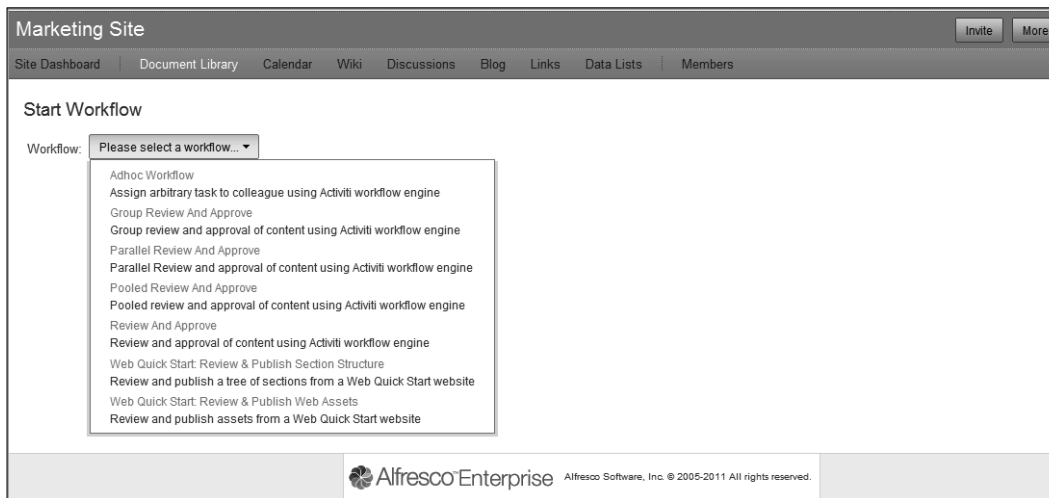
Users can click on the down arrow besides each role privilege and change the permissions. Click on **Save** to save the change:



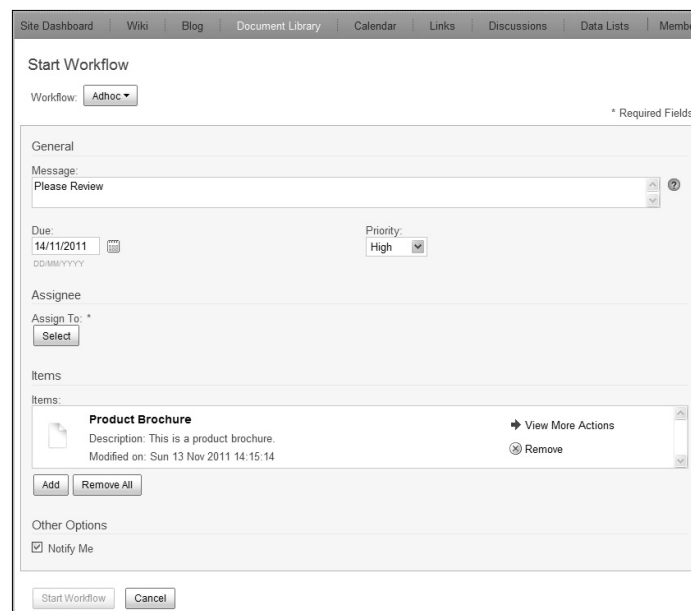
The new permission set will now reflect in the **Permissions** section.


## Workflows

Workflows can be assigned at a document level in Alfresco Share. To manage workflows, click on **Start Workflow** in the **Document Actions** section. This will open a page where the user will be asked to select a workflow:

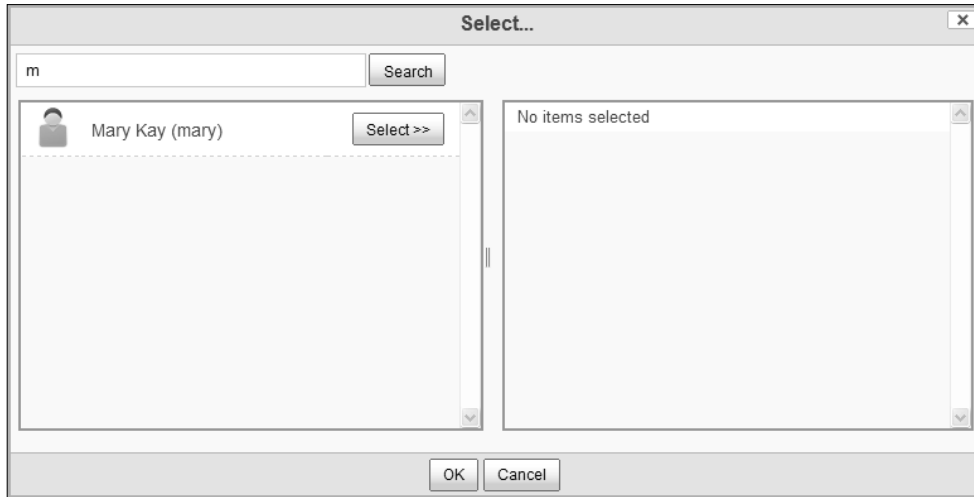


Here, we see a list of workflows that are a part of the Share system. There are Adhoc, parallel, and serial workflows. For this example, we select the Adhoc workflow. This is essentially a single step approve or reject workflow:

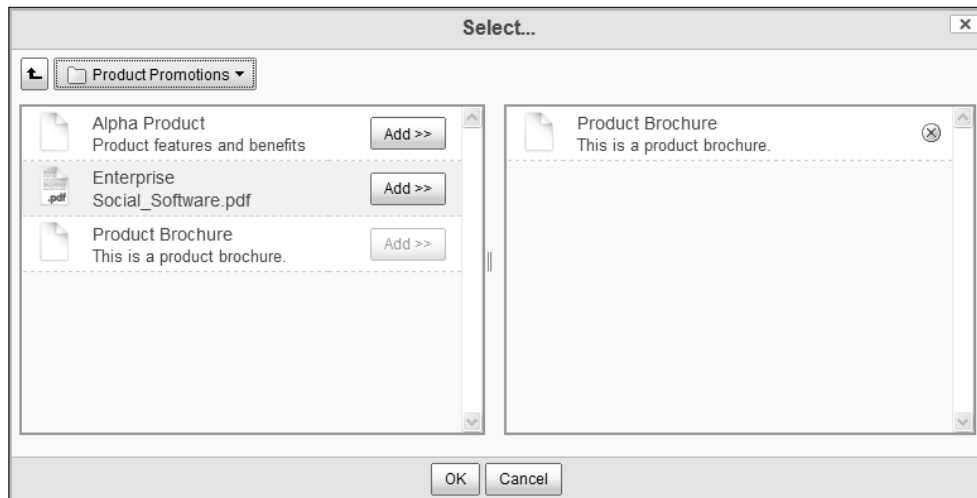


The message to be sent along with the workflow task needs to be put into the message section. The due date, if any, can be selected by clicking on the  icon and selecting a date. The task priority can be selected from an option of high, medium, or low from the drop down priority list.

The next step is to select an assignee for the task. Click on the **Select** button in the **Assign To** section. This opens up a new window, as follows:



Search for and select the user. Click on **OK** to confirm the selection:



Other documents and resources may be added to this by clicking on **Add**. Remove all, removes any document, and so on that has been included here.

Click on **Notify me** to get an e-mail, or any other such notification. Please note that to get an e-mail notification, the e-mail server must be configured and integrated with the Share system:

Site Dashboard
Wiki
Blog
Document Library
Calendar
Links
Discussions
Data Lists
Members

### Start Workflow

Workflow: Adhoc

\* Required Fields

**General**

Message:  
Please review

Due: 14/11/2011 DD/MM/YYYY [calendar icon]      Priority: High

**Assignee**

Assign To: \*  
[user icon] Mary Kay (mary)  
Select

**Items**

Items:

**Product Brochure**

Description: This is a product brochure.  
Modified on: Sun 13 Nov 2011 14:15:14

➔ View More Actions

⊗ Remove

Add
Remove All

**Other Options**

Notify Me

Start Workflow
Cancel


Alfresco Enterprise
Alfresco Software, Inc. © 2005-2011 All rights reserved.



Click on **Start Workflow** to start a workflow on the document. The workflow that the document has been assigned to will be added to the document details page now:

**Workflows**

This document is part of the following workflow(s):

-  Please review  
Adhoc





Clicking on the workflow message will open the workflow details page, as follows:

Site Dashboard | Wiki | Blog | Document Library | Calendar | Links | Discussions | Data Lists | Members

Location: Documents > Product Promotions

### Details: Please review (Start Adhoc Task)

**Workflow Summary**

<p><b>General</b></p> <ul style="list-style-type: none"><li> Workflow is in Progress</li><li> Due on Mon 14 Nov 2011</li><li> High Priority</li></ul>	<p><b>Most Recently Completed Task</b> <span style="float: right;"><a href="#">View Current Tasks</a></span></p> <p><b>Start Adhoc Task</b> Completed on: 13 Nov, 2011    Completed by: Administrator    Outcome: Task Done</p> <p> Administrator's comment: <input type="text" value="(No comment)"/></p>	
--	--	--

**General Info**


Title: Adhoc  
Description: Assign task to colleague  
Started by: Administrator    Due: Mon 14 Nov 2011    Completed: <in progress>  
Started: Sun 13 Nov 2011 17:18:09    Priority: High    Status: Workflow is in Progress  
Message: Please review

**More Info**



Notify Me: No

**Items**

Items:

 **Product Brochure**  
Description: This is a product brochure.  
Modified on: Sun 13 Nov 2011 14:15:14

**Current Tasks**

Type	Assigned To	Due Date	Status	Actions
Adhoc Task	Mary Kay	Mon 14 Nov 2011	Not Yet Started	 

**History**

Type	Completed By	Date Completed	Outcome	Comment
Start Adhoc Task	admin	Sun 13 Nov 2011 17:18:10	Task Done	

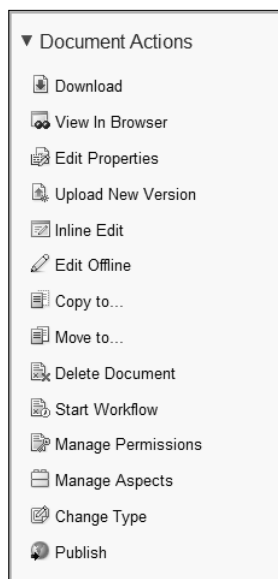
The workflow details page gives a summary of the workflow task. Any comments by the person that started the workflow and general information of the task are listed too. It also tells the user if notifications will be provided. The resources for the workflow task, history, and current tasks are also listed.

The user, if he/she is the creator of the workflow, has the option of cancelling the workflow by clicking on the **Cancel Workflow** button.

Workflows are detailed in another chapter in this book and, hence, not covered here.

## Document actions

A number of actions are available for the user to do for a document. These are also listed in the **Document Details** page:



The following table lists the document actions and the consequences. For each of the actions a new window opens which allows the user to carry out the desired task:

Document Actions	Consequence
Download	Click on Download to download the document onto your system.
View in Browser	Click on View in Browser to view the document in the browser.
Edit Properties	Document properties can be edited by clicking on this
Upload New Version	A new document version can be uploaded through Edit Properties.

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

Document Actions	Consequence
Edit Offline	When you click on Edit Offline the document is downloaded on your system as a working copy and the document on Share is locked to prevent any editing.  The document actions that remain are Edit Metadata, Upload New Version, Inline Edit, Download, View in browser, View Original Document, Start Workflow, and Cancel Editing.  View Original Document lets users preview the original document. In this case users see the document action View Working Copy.
Copy to...	Copies the document to a specified location.
Move to...	Moves the document to a specified location.
Delete Document	Deletes the document upon confirmation.
Start Workflow	Starts a document workflow as per the user's selection.
Manage Permissions	Manages permissions based on the user's roles.
Manage Aspects	Aspects for the document can be managed from here.
Change Type	The content type can be changed by clicking on this. It will open up a window which will give a drop down list for the user to select the type from.
Publish	You can publish the document library content to various social media sites. Alfresco also has the provision for you to publicize this through posing messages on Facebook, Twitter, and LinkedIn.

---

## Document versioning

Any document that is created or uploaded in the document library is versioned and, by default, is stored as version 1.0.

Clicking on a document name will open the **Document Details** page. On this page, the version history of the document is also maintained.

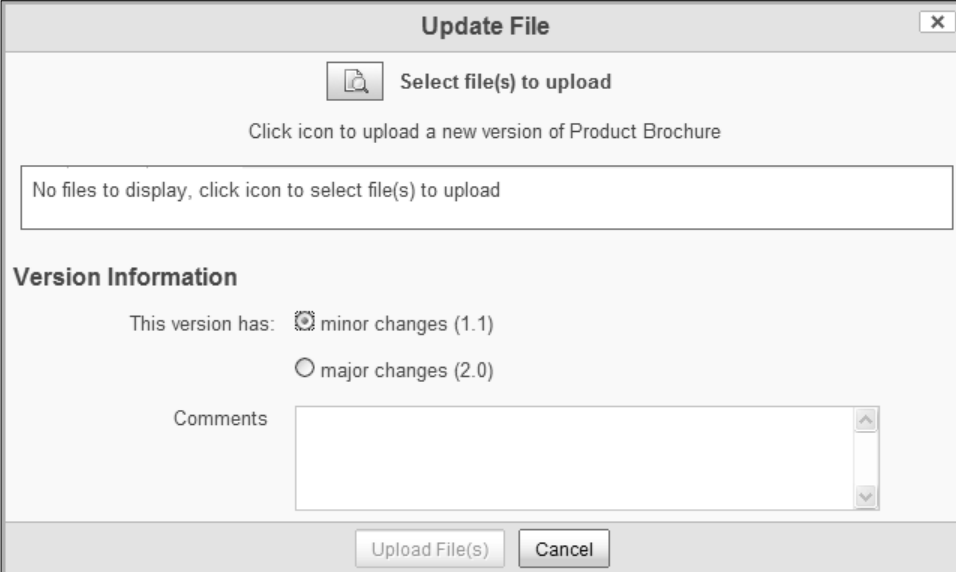
Managing versions can be done in the following two ways:

1. Upload a new version of the document. This can be done from the Upload New Version action listed in Document Actions.
2. Edit document and save the changed document as a new version.

## Upload a new version

In the document details page, click on the **Upload New Version** action in the document actions listed.

This will open an **Update File** pop up window, as follows:



**Update File**

Select file(s) to upload

Click icon to upload a new version of Product Brochure

No files to display, click icon to select file(s) to upload

**Version Information**

This version has:  minor changes (1.1)  
 major changes (2.0)

Comments

Upload File(s) Cancel

Once the file has been selected, choose whether the new version has minor or major changes and the versioning will be carried out in the Share system accordingly. Click on **Upload File(s)**.

Users can also add their comments for added information on the updated file.

The **Document Details** page of the updated document opens up. The version number of the document is now updated in the version history:

The screenshot displays the 'Document Details' page for a document titled 'afresco white paper.pdf'. The document content is a PDF titled 'Alfresco Document Management' with a 'SOLUTION BRIEF' header. The page includes a comments section with two entries from 'Administrator' and a version history section on the right. The version history shows two versions: the latest (2.0) updated after feedback, and an older version (1.0) with a 'Revert to this version' button highlighted.

**Document Details**

afresco white paper.pdf 2.0  
Modified by Administrator on Mon 16 Jan 2012 15:16:38

Document Actions:  
Download  
View In Browser  
Edit Properties  
Upload New Version  
Delete Document  
Start Workflow  
Manage Permissions  
Manage Aspects  
Change Type  
Publish

Tags: (None)

Share: Copy this link to share the current page  
http://share4book.cignex.com/share/page/site/new-product/docu  
copy link to share this page

Properties:  
Name: afresco white paper.pdf  
Title: Alfresco White Paper - Really Simple DM  
Description: (None)  
Mimetype: Adobe PDF Document  
Author: ihowell  
Size: 105 KB  
Creator: admin  
Created Date: Mon 09 Jan 2012 15:14:40  
Modifier: admin  
Modified Date: Mon 16 Jan 2012 15:16:38

Permissions:  
Managers: Manager  
Collaborators: Collaborator  
Contributors: Contributor  
Consumers: Consumer  
All Others: Consumer

Workflows:  
This document is part of the following workflow(s):  
Please review  
Adhoc Workflow

Version History:  
Latest Version  
2.0 afresco white paper.pdf  
Administrator: 10 minutes ago  
Updated after feedback.  
Older Versions  
1.0 afresco white paper.pdf  
Administrator: 43 minutes ago  
(No Comment)  
Revert to this version

Publishing History:  
This document has not been published

**For More Information:**  
[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

## Updating a new version after editing

The users can also update the version when they have edited and updated a document. They can make the changes to the document and save it. They need to specify if the change is a minor one or a major change.

Alfresco provides intelligent editing features. Inline editing is available only for content that is created in Alfresco. For content such as MS Word, editing can be done online or offline. For content such as PDFs only offline editing is available.

## Inline editing

Users can choose to edit a document inline by opening a document in a WYSIWYG editor. The document can also be edited offline by downloading it on to the user's system and then editing it.

Click on **Inline Edit** in **Document Actions**. This opens the document in the **Inline Edit** page:

Site Dashboard | Wiki | Blog | Document Library | Calendar | Links | Discussions | Data Lists | Members

### Edit Content

\* Required Fields

Name: \*  
Alpha Product

Title:  
Alpha Product

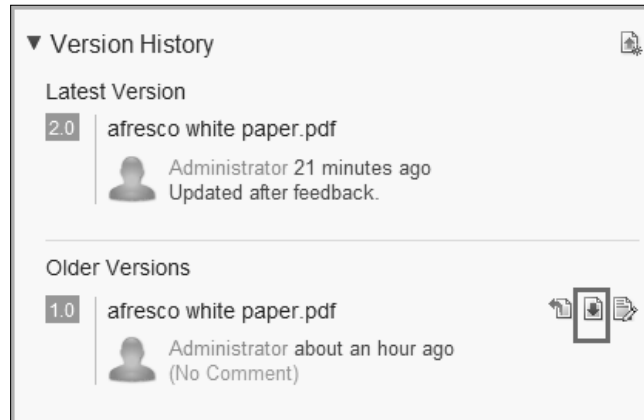
Description:  
Product features and benefits

Content:  
Alfresco Enterprise Edition enables organizations to control costs and boost productivity in the following ways:  
• Rapid deployment delivers immediate business value:  
Alfresco's Web 2.0 functionality enables organizations to simply and rapidly rollout collaborative content solutions;  
• Supports initiatives for knowledge retention, best practice and

Save Cancel

Alfresco Enterprise Alfresco Software, Inc. © 2005-2011 All rights reserved.

Make the required changes and save the document by clicking on **Save**. Now in the **Document Details** page, the version history lists the new version, as follows:



## Online edit


SharePoint Protocol needs to be configured to enable this feature. However, it is important to note that there is a known issue with Office 2003 and 2007. The documents open as read-only in Internet Explorer for all versions before Vista SP1.



Furthermore, to use online edit in Windows 7, you must set `BasicAuthLevel` in the registry. Basic authentication is disabled in Office 2010. To enable it, you must create, or edit, the following registry key:

```
HKCU\Software\Microsoft\Office\14.0\Common\Internet:  
BasicAuthLevel=2.
```

Kerberos authentication can also be used. Set the `vti.server.external.host` and `vti.server.external.port` properties in the `alfresco-global.properties` file. This will set the values to the externally resolvable host and port name that SharePoint clients will communicate with. These properties default to the host machine's local name and port 7070, respectively. Share will use these to generate the `Edit Online` link. The document is opened using the SharePoint module.

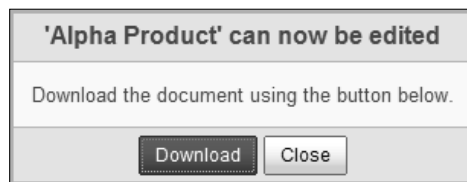
Enabling the **Online Edit** option allows you to bypass the tasks of downloading the item to your computer and then updating the repository version with the changes. Navigate to the space containing the content item you want to make changes to, they are as follows:

1. Click the  icon to edit the item online. Once this is clicked, the item is locked to prevent others from making changes to the item at the same time. It is locked by you.

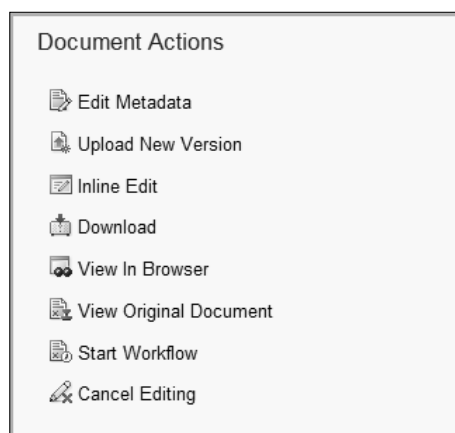
2. An online editor opens up. This now displays the content you have selected to edit. It is a working copy of the content.
3. Edit the document. Click on **Save** to save the changes you have made.
4. At any time, you can click the  icon. This cancels the editing task and unlocks the item without saving any changes that may have been made.
5. The working copy of the item displays the updated timestamp. You can leave the item locked if you plan to work on it again, or you can unlock it so that it is available to other users.
6. Click the  icon once you are done editing. This will unlock the document and add the updates to the repository.

## Offline editing

Click on **Edit Offline** in **Document Actions** to edit the document offline. This creates a working copy of the document and locks the document for editing by any other user until the editing is done:

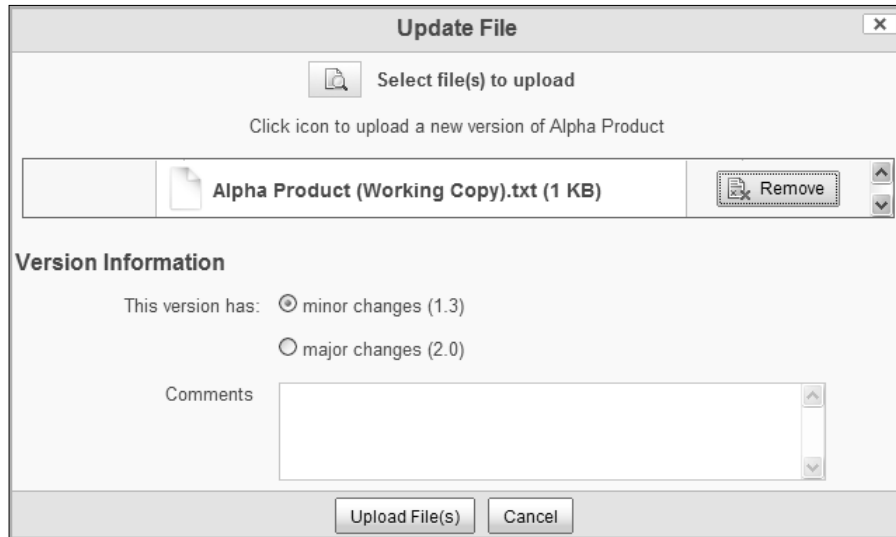


Download the document to a desired location and then edit the document. The document actions that can be performed include uploading the new version, view original version, view in browser, assign workflow, and so on. The user can also cancel the editing:





Once the document has been edited, users can click on **Upload New Version** to upload the updated document. Click on **Upload File(s)** to upload the revised document. Users can add their comments to add more information, as shown in the following screenshot:

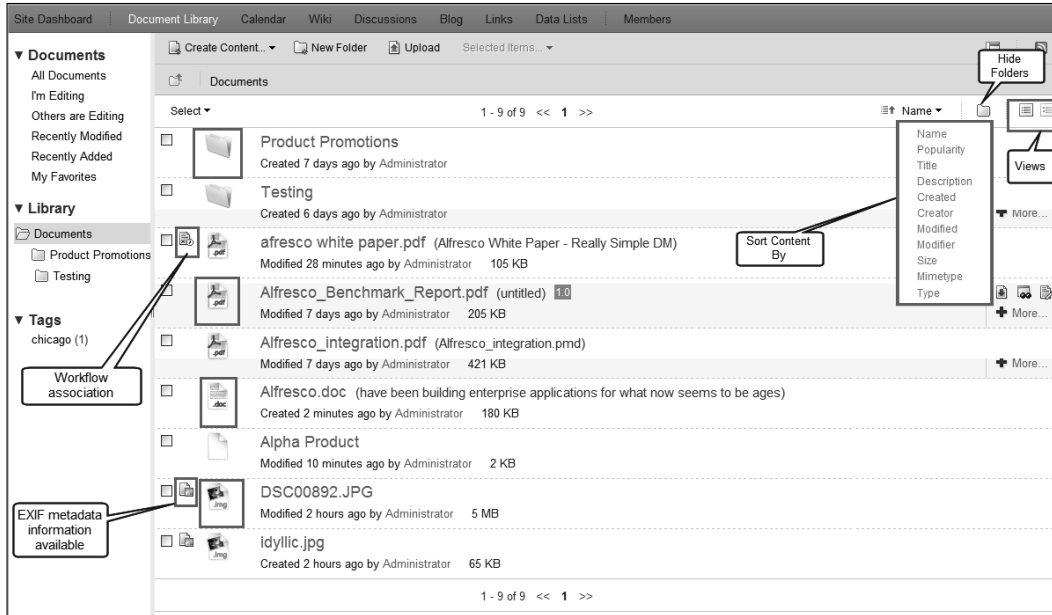


This is, again, reflected in the version history in the **Document Details** page.

## Thumbnails and universal viewing with web previews

The documents in the library are listed in the library. Each document has a thumbnail, or an icon, besides its name and description depending on the folder view that is selected. In the simple view, the icons represent the type of document, PDF, Word, and so on.

In the detailed view, every document has a thumbnail beside it, as follows:



If a document has an active workflow associated, an icon is displayed besides the thumbnail to represent this. Similarly, if external information about an image is available, it is represented by an icon beside the image icon.

Clicking on the **View in Browser** action in the **Documents** action, or on the actions that appear besides the document on move over, opens the document in the browser.

## Tagging documents

To tag documents, click on **Edit Metadata** in the **Document Actions** section. This will open a window where metadata can be edited and tags can be added:

**Edit Metadata** \* Required Fields

Name: \*  
Product Brochure

Title:  
Alfresco Share

Description:  
This is a product brochure.

Mimetype:  
Adobe PDF Document

Author:  
Vinita Choudhary

Tags:  
Select

Save Cancel

To add tags, click on the **Select** button, as shown in the following screenshot:

**Select...**

Tags

- alfresco
- collaboration
- share
- content
- ecm

OK Cancel

This will attach the tags selected with the document. Now, the tags will appear listed in the **Document Details** page:

The screenshot shows the 'Product Brochure' document details page in Alfresco Share. The document is displayed in a viewer with a toolbar showing zoom (76%), page navigation (Page 1 of 2), and window management (Fullscreen, Maximize). The document content includes a title 'Alfresco Share - Collaborative Content Management' and several sections: 'Collaborative Content Management', 'Alfresco Share Features', 'Document Library', 'Search', and 'Activity Feeds'. To the right of the document viewer is a 'Metadata' section with the following details:

- Name: Product Brochure
- Title: Alfresco Share
- Description: This is a product brochure.
- Mimetype: Adobe PDF Document
- Author: Vinita Choudhary
- Size: 254 KB
- Creator: admin
- Created Date: Sun 13 Nov 2011 12:17:49
- Modifier: admin
- Modified Date: Sun 13 Nov 2011 17:59:43

Below the metadata is a 'Tags' section with three tags: 'alfresco', 'share', and 'collaboration'.

## Search for documents

Searching for documents is efficiently carried out by the Lucene search engine, which powers the search in Alfresco. The search results display the term that was searched for not only in the file/document name, but also if the term is within the document:

The screenshot shows the Alfresco Share search results page for the query 'Product'. The page header includes the Alfresco Share logo, navigation links (My Dashboard, Sites, People, Repository, More...), and a search bar containing 'Product'. The main content area is titled 'Marketing Site' and shows a search result for 'Documents'. The search results are displayed in a table with columns for 'Select', 'Showing items 0 - 0 of 0', and 'Show Folders'. The search results are currently empty, and the message 'No items. Click "Show Folders" to see 1 subfolder(s) here.' is displayed. The left sidebar shows the 'Documents' section expanded, with 'Product Promotions' listed. The 'Tags' section is also visible, showing 'alfresco (1)', 'share (1)', and 'collaboration (1)'.

The search is carried out through the system and the search results are displayed in a paginated manner. The search results can be sorted based on the current site, all sites or the entire repository by selecting from the tabs on top:

The screenshot shows a search interface with the following elements:

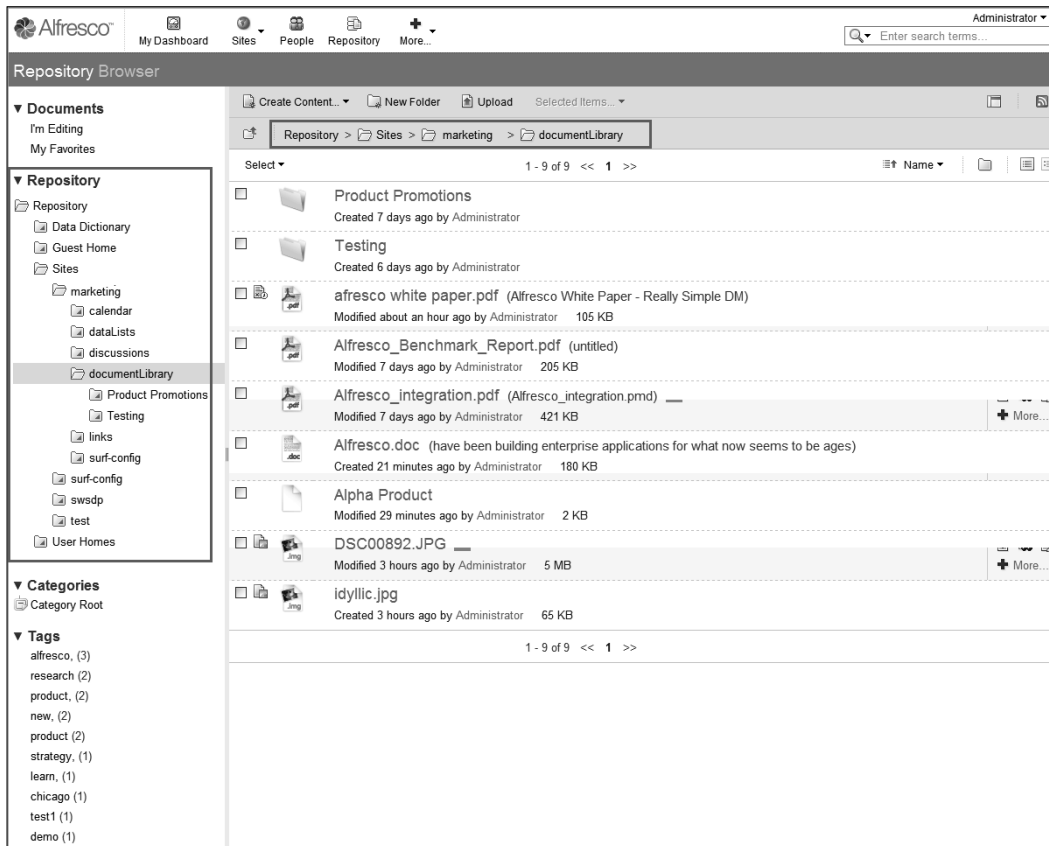
- Search Bar:** Contains the text "Marketing Site | All Sites | Repository" and a search input field with "product" and a "Search" button.
- Results Summary:** "10 result(s) found in New Product site." and a "Sort by: Relevance" dropdown menu.
- Sort Menu:** A dropdown menu listing sorting options: Relevance, Name, Title, Description, Author, Modifier, Modified, Creator, Created, Size, Mimetype, and Type.
- Search Results:** A list of 10 items, each with an icon and a title:
  - Product Promotions:** Folder icon. Product Promotions. Folder in site New Product modified by Administrator modified on Mon 9 Jan 2012 15:08:19. In folder: /
  - Alpha Product:** Document icon. Alpha Product. Document in site New Product of size 2 KB modified by Administrator modified on Mon 16 Jan 2012 15:34:03. In folder: /
  - Product Demo:** Calendar icon. Product Demo for the teams involved in the product promotions. Calendar Event in site New Product modified by Administrator modified on Tue 10 Jan 2012 15:32:18. Tags: alfresco, demo
  - Online Product Information:** Link icon. Link in site New Product modified by Administrator modified on Wed 11 Jan 2012 12:55:03. Tags: product, research
  - Workshop:** Calendar icon. Workshop on new product strategies. Calendar Event in site New Product modified by Administrator modified on Tue 10 Jan 2012 14:00:05. Tags: new, strategy, product
  - Lunch and Learn:** Calendar icon. Lunch and learn about the new product. Calendar Event in site New Product modified by Administrator modified on Tue 10 Jan 2012 13:59:18. Tags: alfresco, learn, product
  - Product Marketing:** Forum icon. Product Marketing. Forum Topic in site New Product of size 0 bytes modified by Administrator modified on Wed 11 Jan 2012 12:58:42
  - Product Features:** Forum icon. Product Features. Forum Topic in site New Product of size 0 bytes modified by Administrator modified on Wed 11 Jan 2012 13:00:03. Tags: review
  - Team Meeting:** Calendar icon. Team meeting to discuss the new product research. Calendar Event in site New Product modified by Administrator modified on Tue 10 Jan 2012 13:57:07. Tags: alfresco, product, new, research
  - Alfresco.doc:** Document icon. Alfresco.doc (have been building enterprise applications for what now seems to be ages). Document in site New Product of size 180 KB modified by Administrator modified on Mon 16 Jan 2012 15:41:54

The search results can be sorted based on various parameters such as relevance, name, author, created, size, and so on.

**For More Information:**  
[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)

## Accessing the Repository

Click on the **Repository** button on the top navigation bar to access the repository, as shown in the following screenshot:



The document library of the site can be accessed by going in to the Sites folder and selecting the relevant site. Clicking on the **document Library** thereafter will allow users access to the folders and documents of the site's document library.

## Summary

As seen in this chapter, the document library in Share is an easy to use feature which has many benefits for the teams collaborating on various tasks. The features of tagging enable a better search. Workflows, permission, and aspects can be easily managed through the document actions available.

The next chapter is on implementing workflows in Alfresco Share. Here we shall learn how the documents, and other content, are put through the workflow and the various options available to use.

## Where to buy this book

You can buy Alfresco Share from the Packt Publishing website:

<http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book>.

Free shipping to the US, UK, Europe and selected Asian countries. For more information, please read our [shipping policy](#).

Alternatively, you can buy the book from Amazon, BN.com, Computer Manuals and most internet book retailers.



[www.PacktPub.com](http://www.PacktPub.com)

**For More Information:**

[www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book](http://www.packtpub.com/alfresco-share-easy-collaboration-for-enterprises/book)