



Alfresco Content Services 5.2

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# Getting Started Guide



# Contents

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<b>Getting started with Alfresco Share.....</b>	<b>3</b>
Signing in.....	3
Personalizing Alfresco Share.....	4
Setting up your dashboard.....	4
Updating your profile.....	5
Building a site.....	5
Creating a new site.....	6
Customizing the site dashboard.....	6
Adding features to a site.....	7
Working with content.....	7
Adding content.....	7
Editing content.....	8
Creating content.....	9
Being social.....	9
Scheduling events.....	9
Adding users to your site.....	10
Using social features.....	10
Following users.....	11
Sharing content externally.....	11
Linking your site to the cloud.....	12
Sharing your content on the cloud.....	12
Removing your content from the cloud.....	12
Starting a cloud-based workflow.....	13
Do great work.....	14

## Getting started with Alfresco Share

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For most of us, today's work environment means we spend much of our time working in teams that can extend beyond our workplace, and even our enterprise, to include partners, consultants, external agencies, and customers.

With Alfresco Share it's simple to share information, run projects, and collaborate effectively.

This guide gives you an introduction to some of the features of Alfresco Share:

- Personalize Alfresco Share with your own dashboard and user profile
- Build a site for your team
- Work with content and add it to your site
- Be social! Add users to your site, set up meetings and use social media features
- Share content outside of your organization on the cloud

You'll also be shown other little tricks and tips to help you get more out of Alfresco Share, so you can work and collaborate efficiently and effectively.

The video shows an overview of the Alfresco Share features:


## Signing in

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To start the Getting Started guide you need to sign in to Alfresco Share.

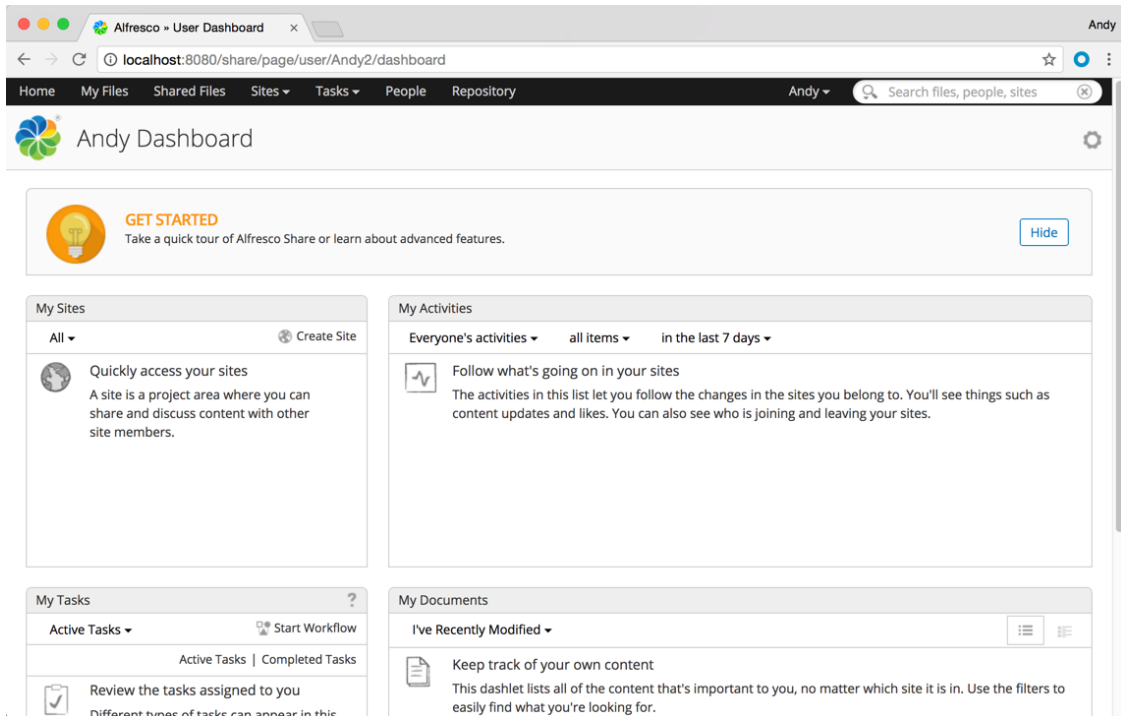
1. Enter the following on the sign in screen:

- a. **Username:** *your user name*
- b. **Password:** *your password*

 You can get the sign in URL from your IT team. If you've downloaded Alfresco Share straight to your computer then the default url is *127.0.0.1:8080/share*.

2. Click **Sign In**.

This opens your personal dashboard. You can now configure the dashboard so that it shows the information most important to you.



## Personalizing Alfresco Share

Having installed Alfresco Share and signed in, the first thing you can do is to personalize Alfresco Share to your own tastes and needs.

You're going to update your dashboard and your profile.

Your dashboard is made up of dashlets - each dashlet displays summary information on different parts of Alfresco Share, such as your latest updates, your tasks, or your sites. There are two different sets of dashlets available - one set for your personal Alfresco Share dashboard and one set that is used to customize individual sites that you set up.


As well as adding and removing dashlets you can also customize your dashboard layout.

Managing your profile means that you can create a personality that's visible to other Alfresco Share users.

### Setting up your dashboard

You can customize your dashboard so that you only see the information that you're interested in.

**To customize your dashboard appearance and content:**

1. Click  to show the **Customize User Dashboard** page.
2. Click **Change Layout** to display the available layouts.
3. Click **Select** for the Three columns option.
4. Click **Add Dashlets** to display all the available dashlets.
5. Drag and drop **My Profile** and then **My Calendar** to Column 3.
6. Select **Hide from Dashboard** for the Get Started Panel.
7. Click **OK**.

If you look at your dashboard now you can see that it's been updated with your dashlet choices.

- 💡 You can also resize dashlets to line them up nicely - just click on the bottom of a dashlet then drag up and down to resize it.

Your dashboard is now customized exactly as you want it - this isn't fixed though, you can change the dashboard whenever you like. You can click My Dashboard from anywhere in Alfresco Share to take a look at your dashboard.

This video shows the steps in the tutorial.

## Updating your profile

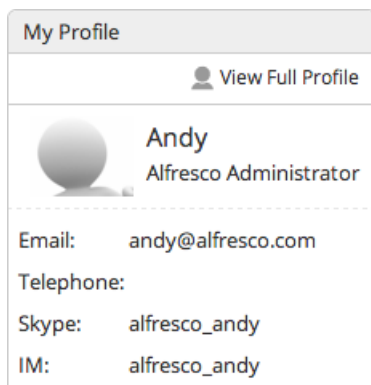
Alfresco Share user profiles help you to identify who a user is and what they do in your organization.

Your name is displayed at the top of the screen. When you click on the name a menu opens where you can update profile details, change your password, search the help, and log out.

### To update your profile:

1. Click your name and select **My Profile**, then click **Edit Profile**.
  - 💡 You can also select **View My Profile** from the My Profile dashlet.
2. Enter all the details that you want to show in your profile, including a picture if you like, then click **Save Changes**.
3. Click **Home** and you can see the updated details in the My Profile dashlet.

When your colleagues view your profile they'll see all the details you've entered.



This video shows the steps in the tutorial.

## Building a site

Now that you've personalized your own dashboard and profile, you're ready to set up a site.

Collaboration in Alfresco Share is based around the concept of creating sites that teams can share content in, but an Alfresco Share site is more than just a place to share and manage content. You can schedule and manage meetings and calendars, publish blogs and set up forums where you can have team discussions, and even write content online and publish it to a wiki.

## Creating a new site

The first thing that you need to do is to create a site and choose its settings.

1. Click **Create Site** on the **My Sites** dashlet or click the **Sites** menu at the top of the screen and select **Create Site**.

Whichever method you choose will open up the **Create Site** dialog box.

2. Now enter site details as shown. You'll notice that the URL Name is automatically created.

- Name: Marketing Content
- Description: This site is for sharing and collaborating on marketing content.
- Visibility: Public



By setting the site to **Public** all users in your organization can see and join the site. Selecting **Moderated** means that everyone can see it but a site manager has to approve requests to join. If you set the site visibility to **Private**, only users that you, the Site Manager, add to a site will be able to see and join the site. The visibility setting you select is displayed next to the site name when a user is in the site. See for more information on site visibility settings.

3. If you have modules such as Records Management installed, then there will be an additional Type option. Select **Collaboration** to create a standard site.
4. Click **Create** and the dashboard for your new site is now shown.

Now that you've created a site, you can start to customize it, in much the same way as you did with your personal dashboard.

This video shows the steps in the tutorial.

## Customizing the site dashboard

A site dashboard displays all information and activities associated with the site. You can customize the site dashboard just as you did with your personal dashboard.

1. Click  then **Customize Dashboard**.
2. Leave the current layout as it is and click **Add Dashlets**.



Notice how the dashlets differ to those available for your personal dashboard. The personal dashlets help you to configure what you want to see such as activity on

sites that you are a member of, whereas the site dashlets are designed to help with team collaboration.

3. Drag the **Wiki** dashlet onto Column 1 and click **OK**.


You can resize the dashlets on the site dashboard as required. You are now nearly ready to add content to your site, just one more step first to customize the site further.


This video shows the steps in the tutorial.

## Adding features to a site

You can add features to your site such as a discussion forum, a wiki, or a blog.

At the top of your site dashboard are tabs for areas of your site. By default you have Site Dashboard, Document Library, and Site Members. You can add additional features as needed for a site and [choose a site homepage](#) . If you look at the Wiki dashlet that you added previously, you'll see that it says that no page is configured. You're now going to configure a wiki for the site.

1. Click  and then **Customize Site**.
2. Drag the Wiki and Calendar icons down into the Current Site Pages area, and click **OK**.

 Take a look at for more details on these features.

Back on the site dashboard you can see that the wiki and calendar have been added. You now have a site set up! It's time to start adding some content...

This video shows the steps in the tutorial.

## Working with content

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Before you begin working with content, we'll look at the two different concepts of content there are in Alfresco Share.

The first is content that is actually part of Alfresco Share features themselves, such as updates to a wiki, a new blog posts, or forum discussions.


The second is content items such as documents, spreadsheets, or images that are stored in the Document Library. These can be uploaded or created directly from Alfresco Share.

So now that you know the differences in content types, it's time to start adding content to your site.

## Adding content

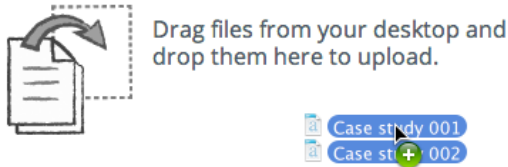
First you'll look at adding content items such as documents, spreadsheets, presentations, and images to a site.

You're going to add two documents that you created previously to your site.

 To help you follow this example you'll need to have two documents available on your computer that you can add to the site.

1. Click **Document Library** to display the document library.  
Alfresco Share gives you lots of options for getting content into the library. You can upload files, create folders, drag and drop files and even create content directly from Alfresco Share.
2. You're going to drag and drop the content in - go to the location where you saved your two files, select them, and drag and drop them directly to the drag and drop area on the Document Library.

## Drag and drop to upload files!



It's as simple as that. Your documents are now uploaded to the site library.


This video shows the steps in the tutorial.

## Editing content

Updating your content in Alfresco Share is easy to do and you can even select whether to edit in Microsoft Office, offline, or in Google Docs.

1. In the Document Library item list, hover your cursor over one of the files.  
This highlights the item and displays the actions available for that item.
2. Click **More** and then select **Edit Offline**.  
Alfresco Share now shows a notification that the document is locked. Depending on your browser the content will be either downloaded automatically, or you will need to choose a location to save it to.  
The document is saved to this location with **(Working Copy)** added to the title.
3. Now open the document from this location using you're preferred software and make an edit it to it.
4. When you've done that save and close it.
5. Back in Alfresco Share, hover your curser over the document and click **Upload New Version**.

6. In the Update File page click the browse icon and find and select the "Working Copy" document.

 If you select a file with a different name or file type then this will be shown. You can continue as in the next step, cancel, or select a different file to upload. If you continue then the uploaded file name and/or file type will be used.

7. Leave the version on minor changes and click **Upload**.
8. When the upload is finished click **OK**, and a modification update is shown on-screen.
9. Click **Site Dashboard** and you'll see update notifications in the dashlets.

This video shows the steps in the tutorial.




## Creating content

As well as uploading content, you can also create content right in Alfresco Share.

1. Select the folder in the site library where you want to add the content.
2. Click **Create**.

You can see a number of different types of file that you can create.

3. Select the type of Google Docs file you want to create.


 The first time you access Google Docs you have to authorize Alfresco Share to use your account. After responding to the prompts a message lets you know that the authorization was successful.

Alfresco Share stores your Google Docs account information. You will need to authorize this each session, but you won't have to re-enter your credentials each time.


If your browser asks you to allow popups for Google Docs then go ahead and do so. If you're using Safari you won't be able to use Google Docs until you enable all popups in the Settings, so for security reasons you may prefer to use a different browser.

Google Docs opens with standard Google Docs functionality available, including the menu, the toolbar, and the features to add comments and share.

4. Enter some content in the text area.

 The file is saved to Google Docs, and locked in Alfresco Share until you check it in.

5. When you're done, close the Google Docs browser tab.

In Alfresco Share you'll see the file displays the  icon to show that it's open in Google Docs.

6. In Alfresco Share, click **More** then **Check In Google Doc**.

7. Now hover over the new item, click , and type a new name for the item then press ENTER.

This video shows the steps in the tutorial.

## Being social

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You have built a site and added some content to it. The next thing you need to do is to get other users on your site, sharing and creating their own content.

In Alfresco Share you can schedule social events using the shared site calendar, and add both internal and external users to the site. You also decide how much power they have in the site, such as whether they can just add content or actively edit content created by other users. There is also a full range of social features such as liking content and following favorite users.

## Scheduling events

Having previously added a calendar to your site, you can now use it to schedule events for your team.

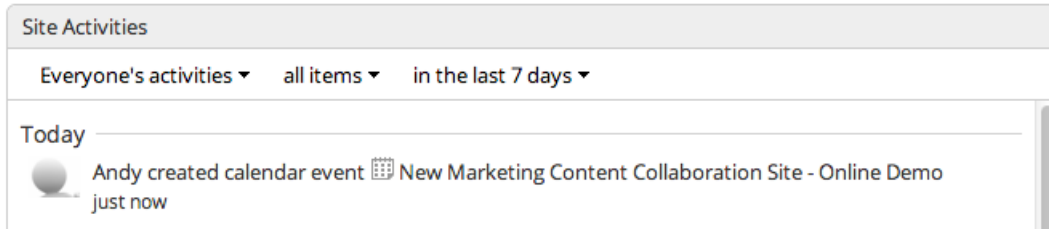
You can schedule an online meeting to welcome new users and discuss the purpose of the site.

1. Click **More** then **Calendar** to open the calendar.
2. Hover over a date on the calendar and click the **Add Event** icon (.

3. Add an event title as the What; because you're holding the meeting online you don't need to enter a Where, but you can enter a description if you like.
4. The date you choose is pre-selected, with the time set at 12:00 PM till 1:00 PM. That sounds good so leave it and click **OK**.

You can see that the event has been created and scheduled in the calendar. If you want to increase visibility of the events you schedule you can always add a calendar dashlet to the dashboard.

5. Click **Home** and you'll see the meeting in the Site Activities dashlet.



## Adding users to your site

Now that you've created a site and added content, the next step is to invite other Alfresco Share users to the site.

1. Click the Add User icon (👤) at the top of the dashboard to open the **Add Users** page.
  - 💡 You don't need to be on your site dashboard to do this - the **Add Users** option is available from everywhere in your site.
2. Type the full or partial name of a user you want to invite and click **Search**.
  - 👤 An internal user is someone in your organization. This tutorial will add the test user, Alice Beecher, but if your Alfresco Content Services administrator has already set up users, then you can add real users if you prefer.
3. Click **Select** to add the user to the **Set User Role** list.
4. Click **Select Role** and select **Collaborator**.
  - ✎ You can set different roles for different users; take a look at the Alfresco Share for more details on user roles.
5. Click **Add Users**.

An email notification is sent to each person that you invited and they can start using the site immediately.

This video shows the steps in the tutorial.

## Using social features

When you look at the site dashboard you can see site activity and details of content that has been added or edited.

1. If you aren't already on it, click **Site Dashboard**.
 

You can see on the Site Content and Site Activities dashlets details of activity on the site such as adding documents and creating calendar events.
2. On the Site Content dashlet click the sorting menu - by default it shows content **I've Recently Modified**.
3. Select **My Favorites** from the sorting menu.

You haven't marked any documents as favourites yet so the Site Content dashlet has nothing to display. Marking items as favorites is a great way to keep track of items you're really interested in, so you're now going to select an item as a favorite.

4. Click the sorting menu again and select **I've Recently Modified**, to display the modified content.

Once that's done you can see there are **Favorite**, **Like** and **Comment** options.

5. Now click the **Favorite** option for one of the documents.

A gold star now indicates that this document is a favorite.

6. Click **Like** as well to show that you approve of the document.

7. Next click **Comment**.

Alfresco Share switches to the Comments field in the document preview.

8. Type "This is great!" and click **Add Comment**.

Your comment is displayed under the document - you can use the comment feature to have discussions with other users about content items.

9. Now click **Site Dashboard** and on the Site Content dashlet select **My Favorites** from the view menu, and now only the document you made a favorite is displayed.

## Following users

There can be many users of a system, so it is likely that there will be some users whose activities will be of more importance to you. You can choose to follow these users so that you can easily keep track of what they've been doing.

1. Click **Site Dashboard**.
2. Click the sorting menu on the Site Activities dashlet.

By default it shows **Everyone's activities**, but you can see that there are other options available including to only show activity from people **I'm following** and to show **My activities**.

To follow another user you just need to visit their profile. You can do this by clicking on their name in the Site Activities dashlet or by searching for them in the **People** area of the site.

3. Click **People** at the top of the site dashboard.

This opens the People Finder where you can search for other site members.

4. Type "a" in the search field and click **Search**.

All users containing the letter "a" in their name are displayed.

5. Click the **Follow** button next to a user and you are now following the user.

6. Click your name at the top of the screen, then **My Profile**.

You'll see that the top of the page shows how many people you're following.

## Sharing content externally

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Having set up your site and added content to it, you can now use the Cloud Sync feature to collaborate with your external partners.


You will sync your content to the cloud. Your marketing consultants will be able to edit it without having access to your on-premise network, and you can maintain visibility of their edits. When the updates are complete you will unsync the updated content from the cloud.

You will then also create a task that must be completed by a cloud user.

 The Cloud Sync feature is not available in Alfresco Community Edition.


## Linking your site to the cloud

You can create a link from your Alfresco Share site to your cloud account to enable cloud-sync.

 Your Alfresco Content Services administrator must have switched on the Cloud Sync feature.

### To link your site to the cloud:

1. Open the user menu on the toolbar and click **My Profile**.
2. Click **Cloud Sync** and then **Sign in to Alfresco Content Services in the Cloud**.
3. Enter the email and password you use to sign in to your cloud account, then click **Connect**.

 If you have not set up a cloud account then click the **No Account? Sign up for free** option.


That's it. You are now ready to share your content with your external consultants.

This video shows the steps in the tutorial.


## Sharing your content on the cloud


You can now sync your content to the cloud, so that your external consultants can make updates to it.

### To share your content on the cloud:

1. Click **Document Library** then hover your cursor over one of the documents.
2. Click **More** and then **Sync to Cloud**.  
The **Sync to The Cloud** page displays.
3. Select the cloud network, site and path that you want to sync content to.
4. Click the **Lock 'on-premise' copy** option, as you don't want any of your team to update this while the external consultants are working on it.
5. Click **Sync**, and a message will display informing you that the sync was created. The  icon shows that the content is synced.

Now the marketing consultants can access your content from the cloud site that you synced with, and edit it as required. Any changes they make will be replicated in the instance of the document you access from your Alfresco Share site.

 Content changes and important properties such as the item name and title are synced back to the Alfresco Content Services version. Comments made in Alfresco Share, version changes, and more minor properties are not synced back to the on-premise version.

 If you want to add some edits of your own then hover your cursor over the item and click **More** and then **View in Cloud**.

This video shows the steps in the tutorial.

## Removing your content from the cloud



When your external collaborators have completed their work on your content, you can remove the content from the cloud.

### To remove your content from the cloud:



1. In the Document Library hover your cursor over the document.
2. Click **More** and then **Unsync from Cloud**.
3. When you are prompted click the check box for the item and then click **Remove sync**.  
A message will display to confirm that the sync has been removed. Now your external consultants no longer have access to the document.

## Starting a cloud-based workflow

You can start a cloud workflow which generates a workflow task or review in an Alfresco Share in the Cloud site.

-  This option is only available if your Alfresco Content Services administrator has enabled the cloud sync and hybrid workflow options. The first time you create a cloud-based workflow you might be asked to verify your cloud sign in details.
1. Hover over an item in the library and click **More** then **Start Workflow**.
    -  You can also start a workflow by clicking **Tasks** on the toolbar, selecting any option then clicking **Start Workflow**. **Start Workflow** is also available on the My Tasks personal dashlet.
  2. Select **New Cloud Task or Review** from the **Workflow** list.  
The appropriate workflow form displays with required fields marked with an asterisk (\*).
  3. Enter details for the workflow in the General section.
    - a. In the **Message** field describe the task requirements, such as *Please review urgently*. This should clearly explain to the user what they are expected to do.
    - b. Leave the **Simple Cloud Task** a Type selected.
    - c. Select a **Due** date for the task.
    - d. Leave the **Priority** set to medium.
  4. Click **Select** to select the network, site, and folder destination for the synchronized content. Only networks that support the Cloud Sync feature can be selected.
  5. Click **Sync**.
  6. Select the user to assign the task generated by the workflow to.  
You can only assign to users in the current network.
    - a. In the Assignee section click **Select** and type the full or partial name of a user.
    - b. Click **Search**.  
Cloud users in your network who match your search are displayed.
    - c. Click the + icon to select a user.
    - d. Click **OK**.
  7. In the After Completion menu select **Delete content on cloud and remove sync**: The content will be removed from the cloud and the sync cancelled.
  8. Select **Lock 'on-premise' copy** to lock the on-premise content being synchronized.  
The lock will remain in place until you unsync the content, meaning that only the cloud version can be edited.
  9. Click **Start Workflow**.  
The workflow task is created. Tasks will appear in the users My Tasks dashlet when they log in to Alfresco Share in the Cloud.

Once they set the task as done it will be assigned to you to complete and close.

In the Document Library content that is part of an active workflow has the  icon. Content that has been synced has the  icon.

## Do great work

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This is the end of the Alfresco Share Getting Started guide, and you should now be able to use Alfresco Share in ways that will improve how you work on a day to day basis.

In this tutorial you've learnt how to:

- Customize your own dashboard and user profile
- Create a site where your team can share content and collaborate
- Work with different kinds of content and add it to your site
- Add users to your site, set up meetings, and use social media-style features
- View and understand site activities
- Share content on the cloud with external collaborators

This is just the beginnings of what you can achieve with Alfresco Share; we'd really recommend that you take some time to look at our other learning resources and try out other features that will help you to do great work:

- Read the documentation on other features
- Watch the Alfresco Share 'How To' videos
- Explore [Alfresco Share in the Cloud](#)
- Use other site components such as discussion forums, blogs, and data lists