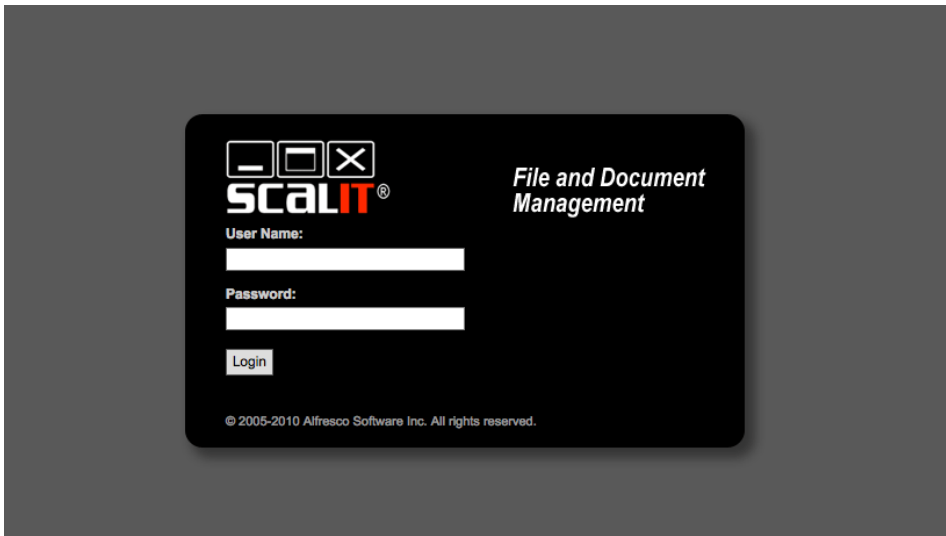


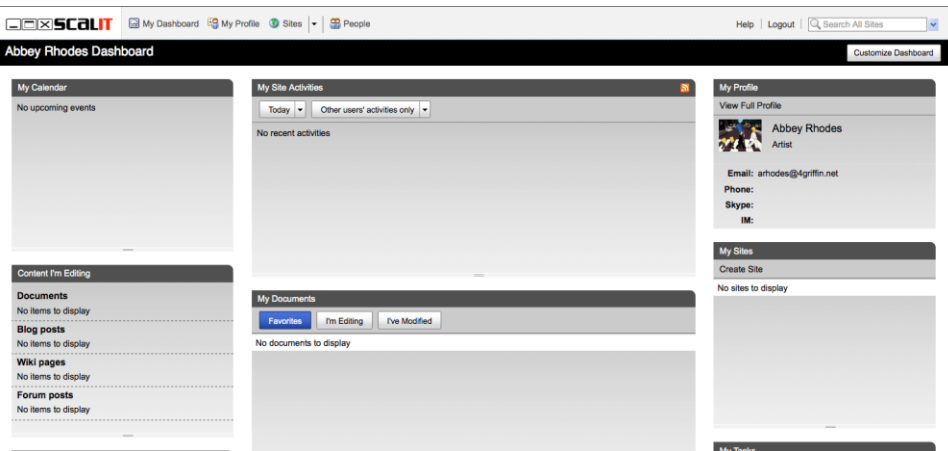
Introductory Tutorial on ScalIT File and Document Management

Logging in to My Dashboard

Log in to the ScalIT File and Document Management web application by entering in your user name (the part of your email address prior to the “@” sign) in to the field marked “User Name” and your password in the field marked “Password.” Then, press the “Login” button.



You are now at your own, personal, user dashboard. This “My Dashboard” view presents you with a place to track all information relevant to you. Your default dashboard consists of personal dashlets that can be customized and rearranged to your own preferences. In most cases, ScalIT will have initially set up your dashboard based on your company’s initial set up requests, but you may find after using it a while that you wish to change it.



Here is a summary of the dashlets available in the “My Dashboard” view of your workspace:

My Calendar

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

Content I’m Editing

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

Getting Started

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

My Sites’ Activities

Your My Sites’ Activities personal dashlet tracks the most recent activities that have been performed in any site of which you are a member. This dashlet displays by default.

My Documents

The My Documents dashlet enables you to view files from all Document Libraries that may be of particular interest to you, organized into three categories: Favorites, I'm Editing, and I've Modified. You can click My Dashboard in the application toolbar from anywhere in Share to return to your personal dashboard.

RSS feed

By default, the RSS Feed personal dashlet displays the latest headlines from the U.S. BBC RSS feeds. You can configure it to personalize your feeds. You can also add and configure as many instances of this dashlet as you want. This dashlet displays by default.

My Profile

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

My Sites

Your My Sites personal dashlet lists all sites that you have created or of which you are a member, providing quick access to each of them. This dashlet displays by default.

My Tasks

Your My Tasks personal dashlet displays any tasks you have on any of your sites. This dashlet displays by default.

Web View

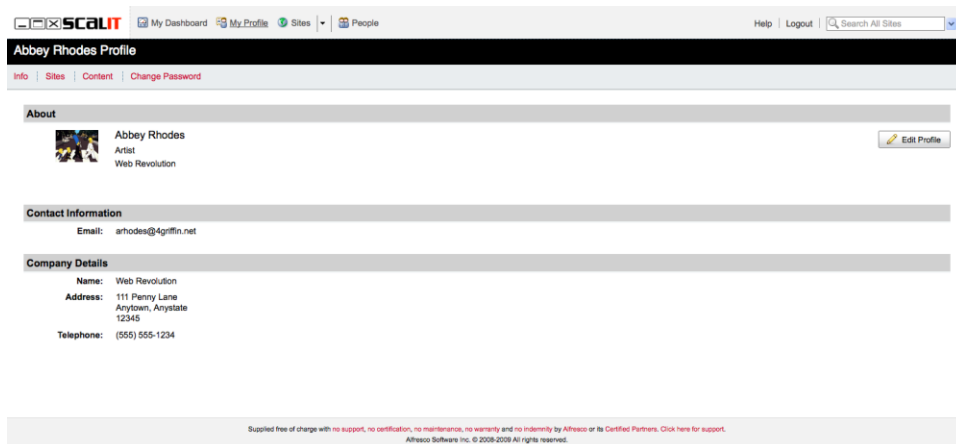
Your Web View dashlet, by default, displays the ScalIT website but can be configured to display any website.

My Workspaces

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

Edit Your Profile

The first time you access your “My Dashboard,” it is suggested that you set up your user profile. Click on the “My Profile” icon at the top of your dashboard. From here, you can edit your profile to include all of your relevant information, add an avatar to represent you in your workspaces, etc. Do **not** change your password here, as it will only create problems for you. If you need to change your password, please contact your company administrator, and have them contact ScalIT for any changes that need to be made.




The screenshot shows a web browser window with the ScalIT logo and navigation tabs for 'My Dashboard', 'My Profile', 'Sites', and 'People'. The main content area is titled 'Abbey Rhodes Profile' and includes a navigation menu with 'Info', 'Sites', 'Content', and 'Change Password'. The profile is divided into three sections: 'About', 'Contact Information', and 'Company Details'. The 'About' section features a profile picture, the name 'Abbey Rhodes', the title 'Artist', the company 'Web Revolution', and an 'Edit Profile' button. The 'Contact Information' section lists the email address 'arhodes@4griffin.net'. The 'Company Details' section lists the company name 'Web Revolution', address '111 Penny Lane, Anytown, Anystate 12345', and telephone number '(555) 555-1234'. A footer contains a disclaimer: 'Supplied free of charge with no support, no certification, no maintenance, no warranty and no indemnity by Alfresco or its Certified Partners. Click here for support. Alfresco Software Inc. © 2008-2009 All rights reserved.'

My Dashboard My Profile Sites People Help Logout Search All Sites

Abbey Rhodes Profile

Info Sites Content Change Password

About

 Abbey Rhodes
Artist
Web Revolution [Edit Profile](#)

Contact Information

Email: arhodes@4griffin.net

Company Details

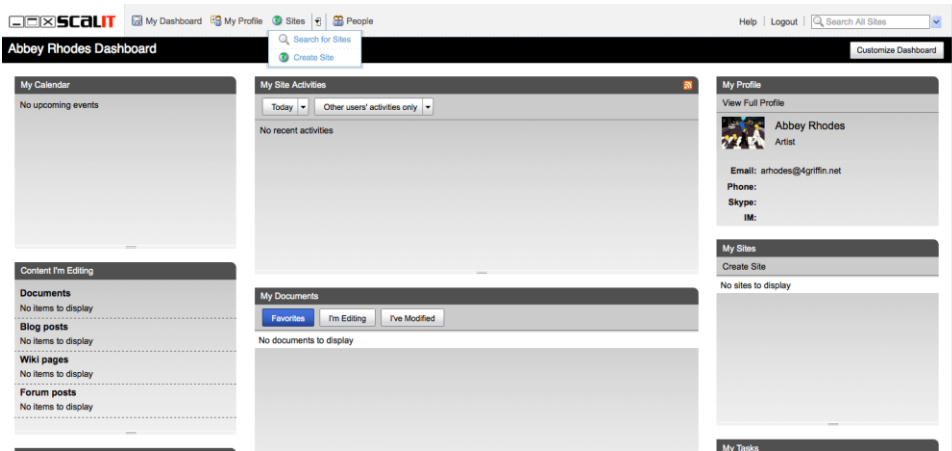
Name: Web Revolution
Address: 111 Penny Lane
Anytown, Anystate
12345
Telephone: (555) 555-1234

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Create a Company Collaboration Site

ScalIT has already created a company-wide collaboration site for your company, which is designed to be your company's default site where all of your company's users have access to the site's resources. This site can be located in your "My Dashboard" page, under the "My Sites" dashlet. You may find that you need to create additional collaboration sites that are only available to specific users, or cater to a specific team or project. If so, it is very simple to create additional collaboration sites. Each site allows you the ability to share and manage content, schedule and manage team events, create online content to share with others by using a site wiki, write blogs, and have group discussions.

First, at the top of your "My Dashboard" page, click on the downward pointing arrow to the right of the "Sites" icon, and select "Create Site" from the resulting dropdown list.



A “Create Site” dialogue box will pop up in the center of your screen. Fill in the fields as follows:

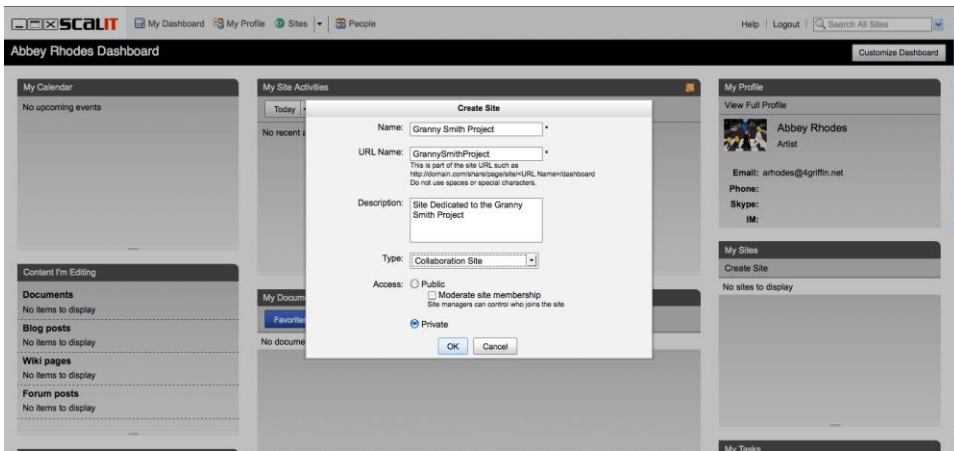
Name – Enter a descriptive name for your site, that will readily identify it for both you and your site’s members

URL Name – Enter an abbreviated descriptive name, without symbols, spaces, or special characters. This will be used by the program to create the web address of this new site.

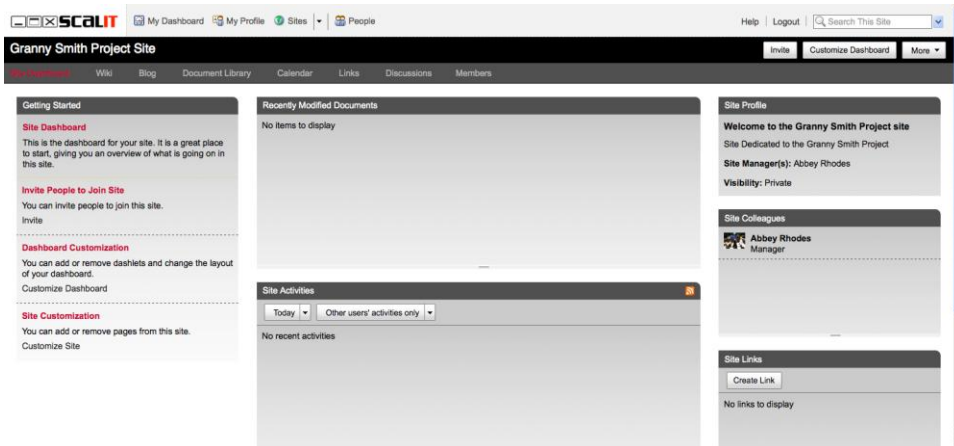
Description – Enter a more detailed description of the purpose of this site. Site members will use this not only to identify the site, but also to learn the purpose and objective of this site.

Type – Select “Collaboration Site.”

Access – Select “Private.” DO NOT SELECT “PUBLIC.” The “Public” option exists only for very rare, specific circumstances, where the information stored in your site needs to be made available for external use, and made accessible to the entire internet. If “Public” is selected, then the security and access to this site is greatly reduced. It is highly recommended that you do not select “Public” for this very reason.



Click on the “OK” button.



Modifying Your Site's Layout

You are now at your new site's user dashboard. This "Site Dashboard" view presents you with a place to track all information relevant to your site's team/project. Your default dashboard consists of dashlets that can be customized and rearranged to your own preferences.

Here is a summary of the dashlets available in the "Site Dashboard" view of your workspace:

Getting Started

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

Recently Modified Documents

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

Site Activities

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

Site Profile

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

Site Colleagues

The Site Colleagues site dashlet displays all members of this site and their assigned role. This dashlet displays by default.

Site Calendar

Your Site Calendar site dashlet contains a rolled up view of events that you have created, as well as events for each site of which you are a member, providing quick access to each of them.

Site Wiki

Your Site Wiki site dashlet enables you to display content from the Wiki page component. You can configure this dashlet to select the page you want it to display.

RSS Feed

By default, the RSS Feed personal dashlet displays the latest headlines from the U.S. BBC RSS feeds. You can configure this dashlet to personalize your feeds. You can also add and configure as many instances of this dashlet on the site dashboard as you want.

Web View

The Web View site dashlet, by default, displays the Alfresco website but can be configured to display any website.

Site Links

The Site Links site dashlet displays the web links relevant to the current site. This dashlet displays by default.

Image Preview

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

The dashlets on your new site are easily configurable, so that all members will have a uniform view of your team or project workspace. In order to modify the layout of your "Site Dashboard," click on the "Customize Dashboard" button in the upper right hand corner of your screen.

The resulting screen allows you to modify the layout of the "Site Dashboard" (number of columns, column width, etc.) and the dashlets appearing on your "Site Dashboard." Click the "Change Layout" button to modify the layout of your "Site Dashboard," or click the "Add Dashlets" button to modify the dashlets appearing on your "Site Dashboard." The "Add Dashlets" panel allows you to rearrange your dashlets by dragging them to a different column or sequence, removing them by dragging them to the trash can, or placing additional dashlets on you "Site Dashboard" by dragging new dashlets from the "Add Dashlets" library and dropping them into the desired location (see below), and pressing the "OK" button.

The screenshot displays the 'Customize Site Dashboard' interface. At the top, it shows the current layout: 'Current Layout: Three columns: wide centre'. Below this is a visual representation of the dashboard layout with a 'Change Layout' button. The main area is divided into three columns: Column 1 (Getting Started), Column 2 (Recently Modified Documents, Site Activities), and Column 3 (Site Profile, Site Colleagues, Site Links). A 'Change Layout' button is located below the columns. Below the columns is an 'Add Dashlets' panel with a 'Close' button. The 'Add Dashlets' panel contains a grid of available dashlets: Site Calendar, Site Colleagues, Recently Modified Documents, Image Preview, Site Activities, Site Links, Site Profile, Getting Started, Site Wiki, RSS Feed, and Web View. Below the 'Add Dashlets' panel is a visual representation of the dashboard layout with a 'Change Layout' button.

Change Layout

Dashlets

Drag and drop the available dashlets into a column to add them to your dashboard. You can also reorder the dashlets within the columns using drag and drop.

Add Dashlets

Close

Site Calendar	Site Colleagues	Recently Modified Documents
Image Preview	Site Activities	Site Links
Site Profile	Getting Started	Site Wiki
RSS Feed	Web View	

Column 1

Site Calendar
Getting Started

Column 2

Recently Modified Documents
Site Activities

Column 3

Site Profile
Site Colleagues
Site Links

Add Dashlets

Close

Site Calendar	Site Colleagues	Recently Modified Documents
Image Preview	Site Activities	Site Links
Site Profile	Getting Started	Site Wiki
RSS Feed	Web View	

Column 1

Site Calendar
Site Wiki
Getting Started

Column 2

Recently Modified Documents
Site Activities

Column 3

Site Profile
Site Colleagues
Site Links

OK Cancel

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SCALIT My Dashboard My Profile Sites People Help Logout Search This Site

Granny Smith Project Site

Wiki Blog Document Library Calendar Links Discussions Members

Site Calendar	Recently Modified Documents No items to display	Site Profile Welcome to the Granny Smith Project site Site Dedicated to the Granny Smith Project Site Manager(s): Abbey Rhodes Visibility: Private
Wiki Configure No page is configured	Site Activities Today Other users' activities only No recent activities	Site Colleagues Abbey Rhodes Manager
		Site Links Create Link No links to display

Invite Users to the New Collaboration Site

While viewing your new “Site Dashboard,” click on the “Invite” button appearing in the upper right hand corner of your screen. This new screen allows you to invite users to access your new collaboration site, and establish user access rights to the features within this new site. The top portion of the screen allows you to search for users that exist within your company, while the bottom portion of the screen allows you to give access to your site to users outside of your company. Once you have selected the users you would like to give access to your site, choose their appropriate access level from the “Set All Roles to” drop down box.

The selected “Role” defines what this new user can access on this site when they are logged in. The role descriptions are as follows:

Administrator

Has all permissions for this site.

Coordinator

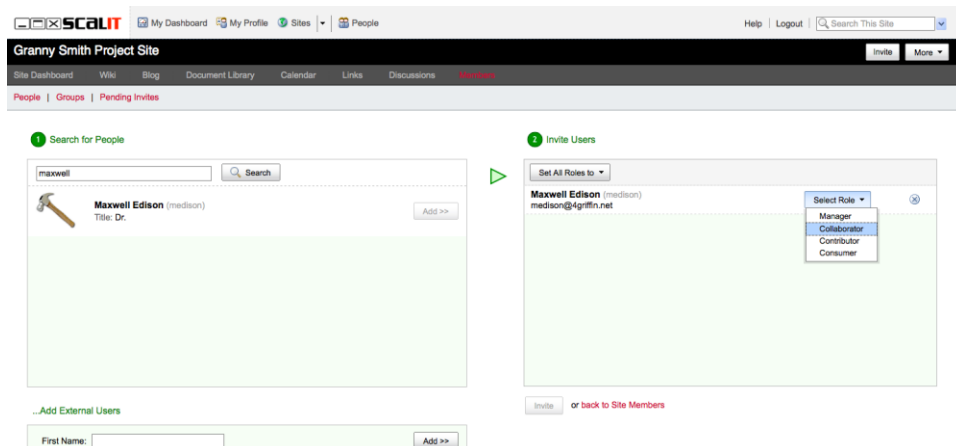
The coordinator gets all permissions of “Collaborator” and “Contributor, plus site modification permissions.

Collaborator

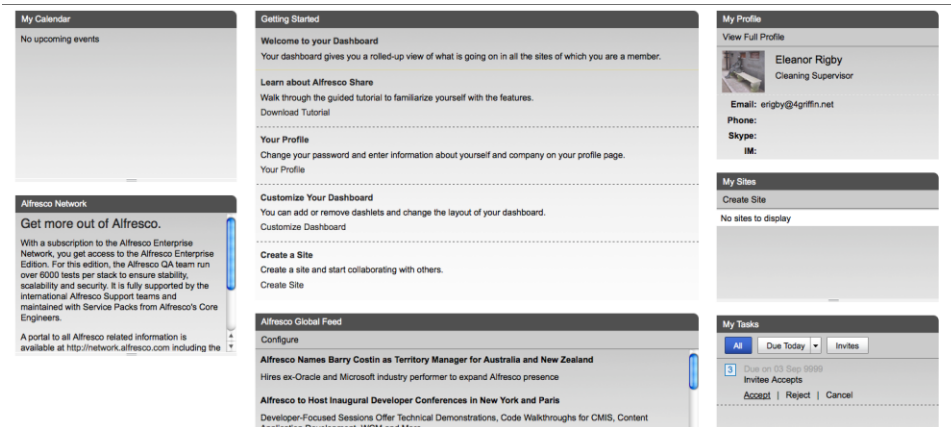
All of the permissions of “Contributor,” plus the ability to write new content.

Contributor

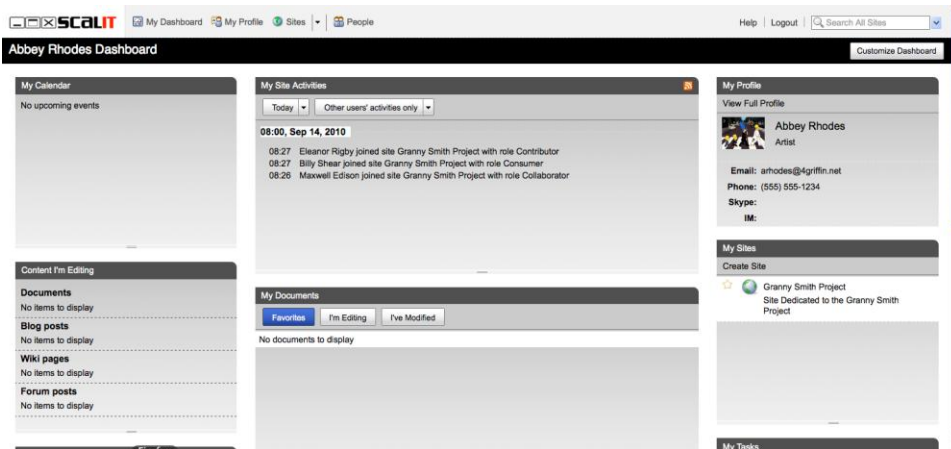
Includes the read, adding new information to existing content, and the ability to check out documents.



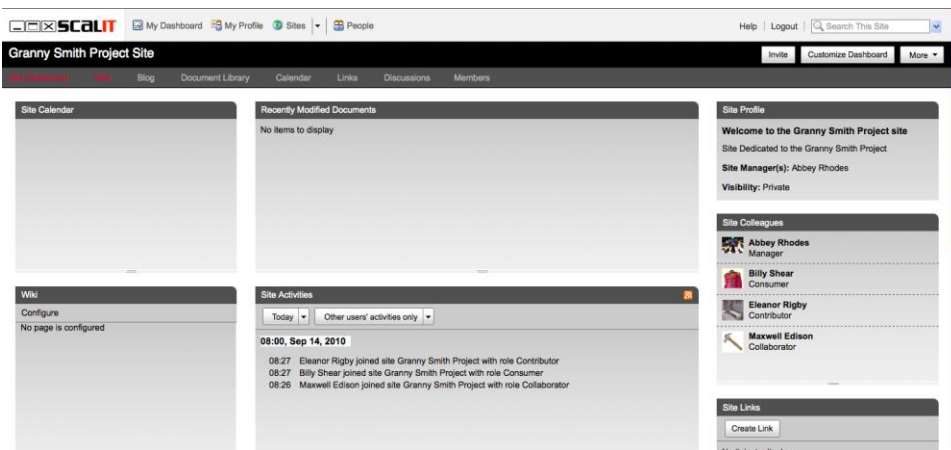
After the new member has been invited, they will receive both an email notifying them of the invitation to join this new site, and a notification of the invite will appear on their “My Dashboard” screen, under “My Tasks,” letting them know that they have been invited to join a new site (see below, bottom right hand corner under).



Upon returning to your own “My Dashboard” screen, you will notice that your new site appears in the “My Sites” dashlet. You will also see when other users accept access to your site under the “My Site Activities” dashlet.

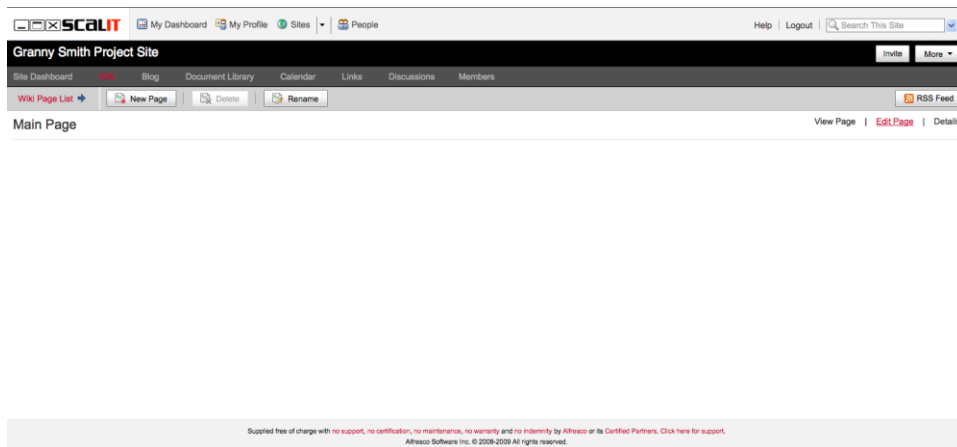


In order to return to your new site, click on the link to the site that appears within the “My Sites” dashlet. When the invited members have accepted their invitations to your new site, you will see them listed under “Site Colleagues.”

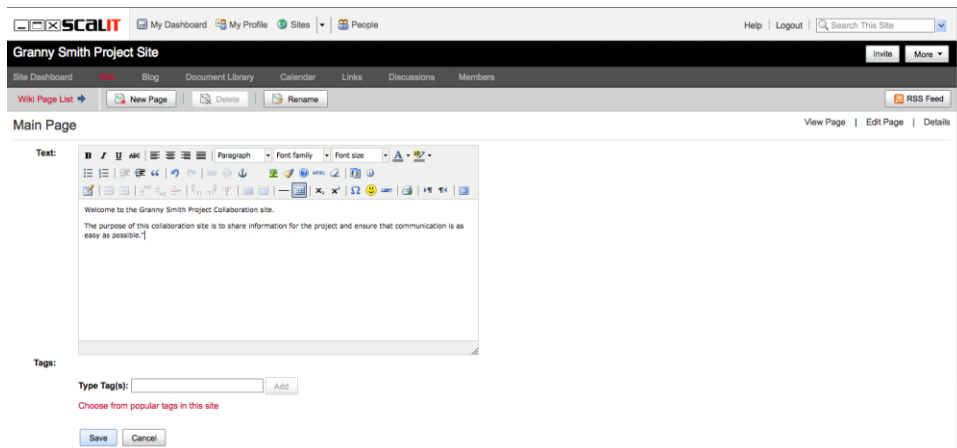


Prepare your Site for Collaboration

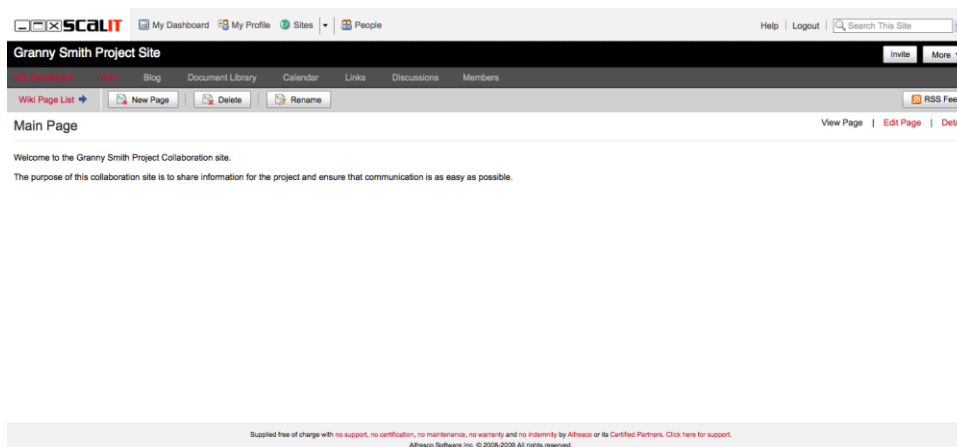
Click on the “Wiki” link, appearing under your site name in the upper left hand corner of your screen. On the resulting screen, click on the “Edit Page” link.



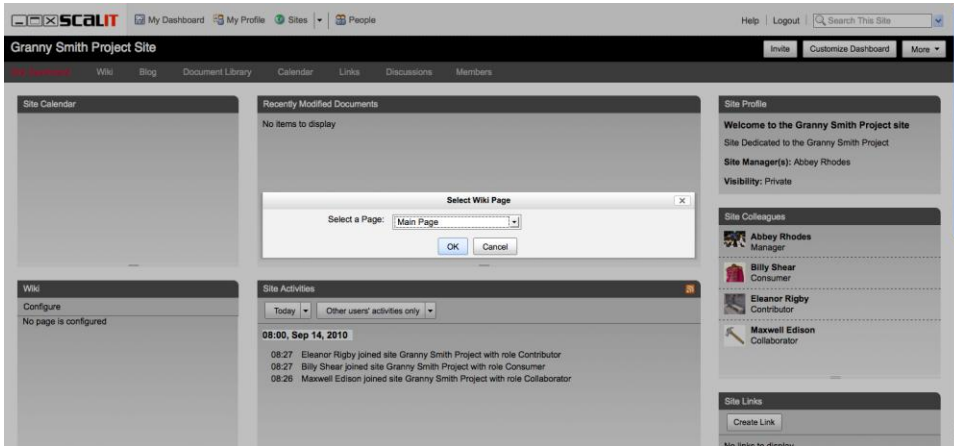
The resulting screen provides you the ability to determine the initial entry in your new site’s corporate wiki. Create an entry that not only welcomes your users to the site, but lays the foundation as to what the site will be used for. The wiki allows for many options in layout and design (see below). Once you have written your new entry, press the “Save” button.



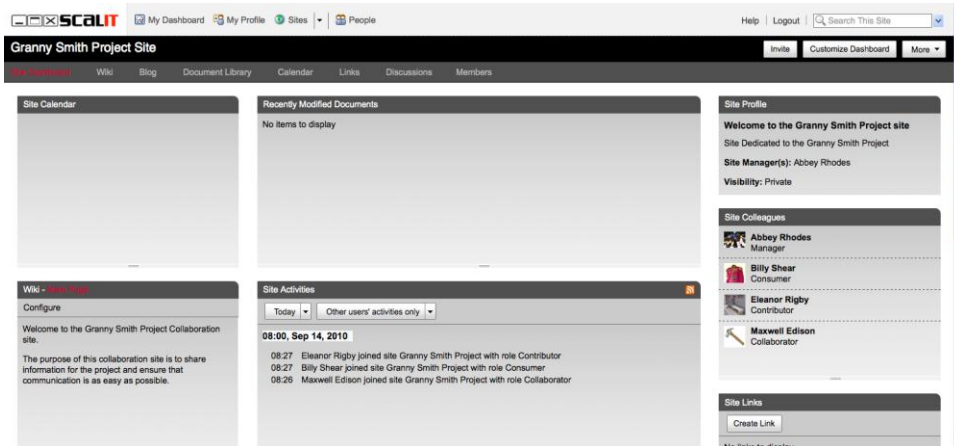
Your site’s wiki is now created. People can add and modify content as your project evolves by using this wiki.



Return to your “Site Dashboard.” On your “wiki dashlet,” click on the “configure” link. In the resulting pop up dialogue box, select “Main Page,” and click on the “OK” button.

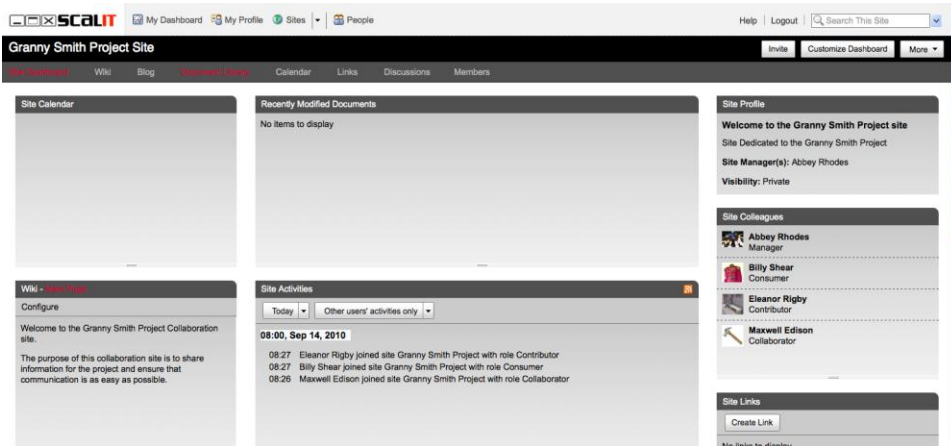


Your collaboration site’s “wiki dashlet” is now configured (see below).

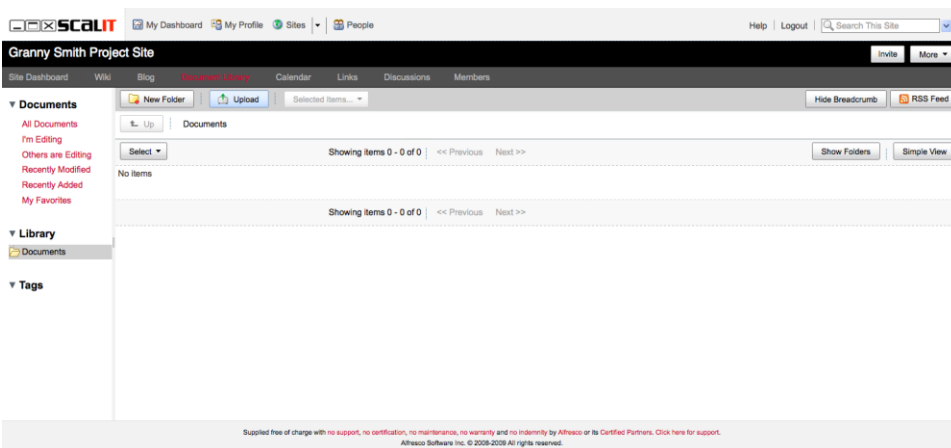


Adding Documents to your Site's Library

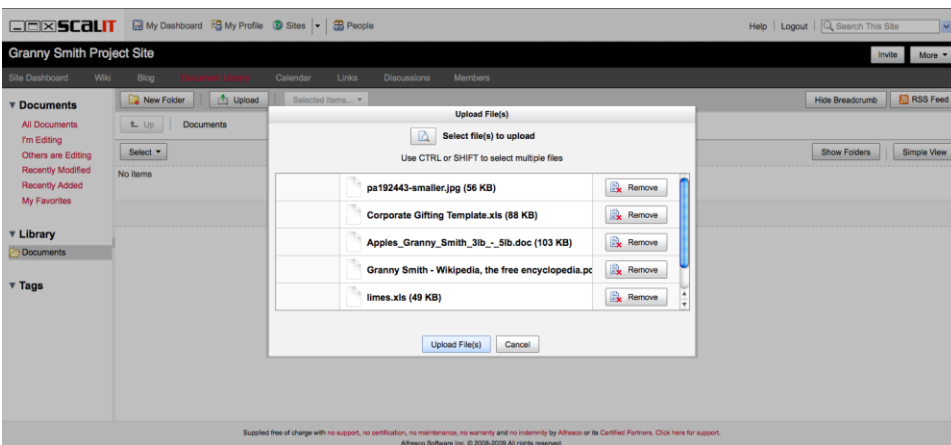
From your "Site Dashboard," click on the "Document Library" link towards the top of the page.

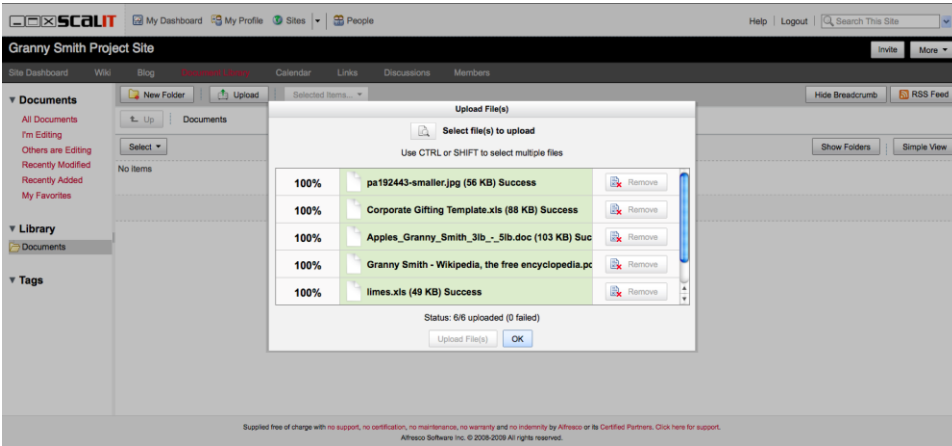
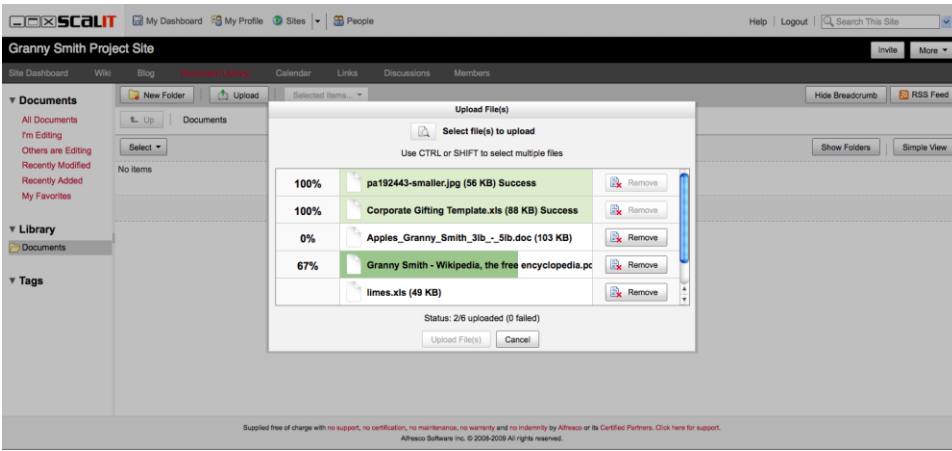


The resulting screen allows you to upload content into your site's document library, as well as to preview and checkout existing content. Click on the "Upload" button to put content into your document library.

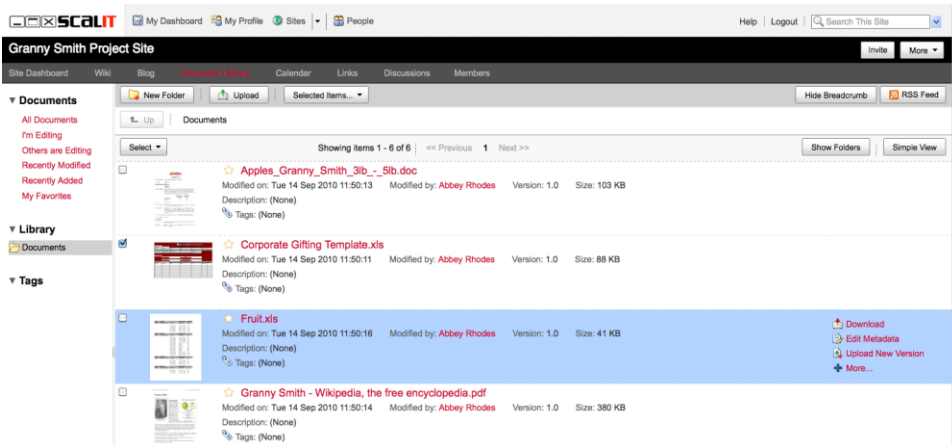


Click on the "Select file(s) to upload" button to choose what you would like to upload into the site's document library. Using your keyboard's CTRL and SHIFT keys allow you to select multiple items to upload. Once you have chosen your files to upload, click on the "Upload File(s)" button. When the documents have finished uploading, click on the "OK" button.

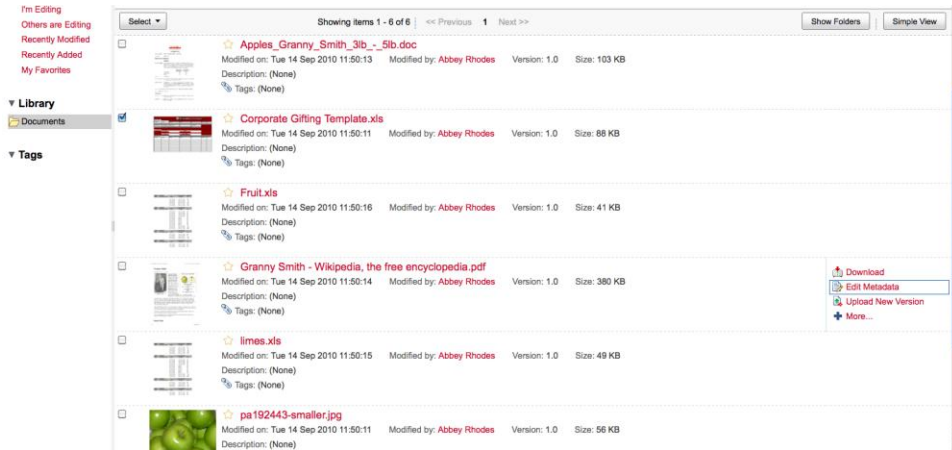




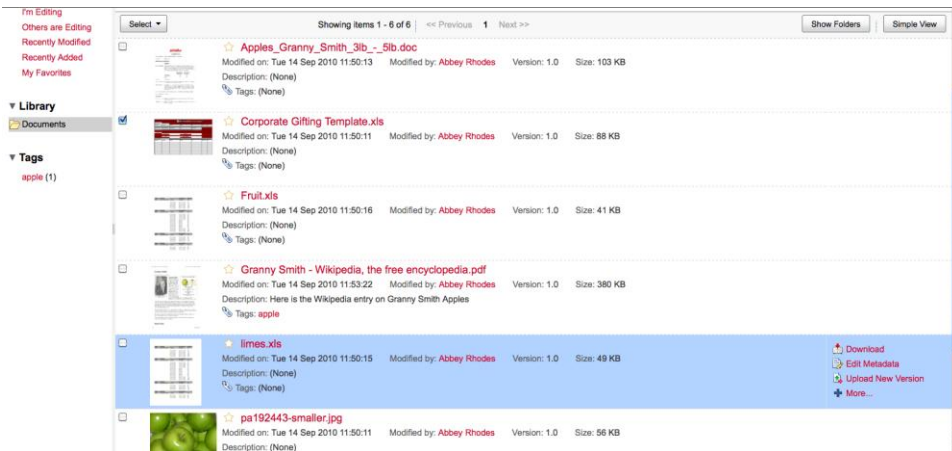
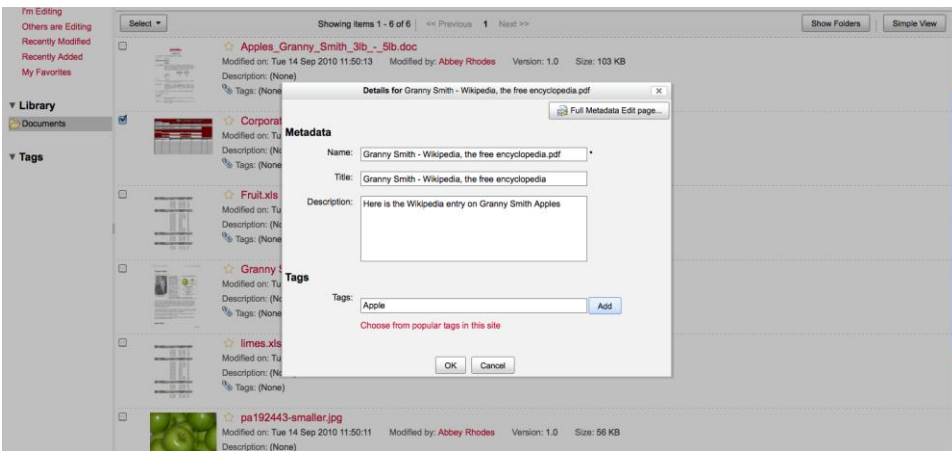
The documents you have uploaded now appear in your library. If the document is a recognized file type, a thumbnail preview is generated, and the content within the document is indexed for future searches of the document library. In the future, simply typing key words for the document you are looking for, whether they are in the document name, or within the document content, will bring a similar screen to this one displaying the documents that meet your search criteria.



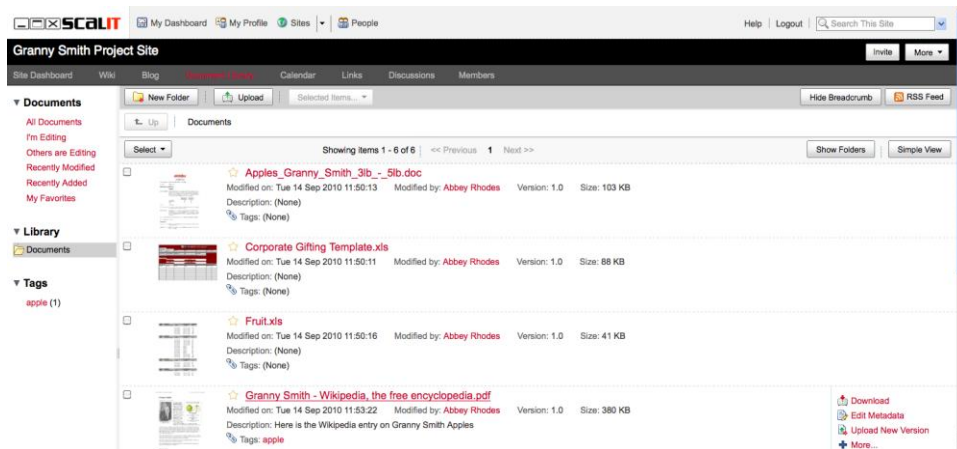
Documents within your library can have their metadata easily modified, to help make future searches even easier. Simply click on the “Edit Metadata” link to the right of the document you want to modify.



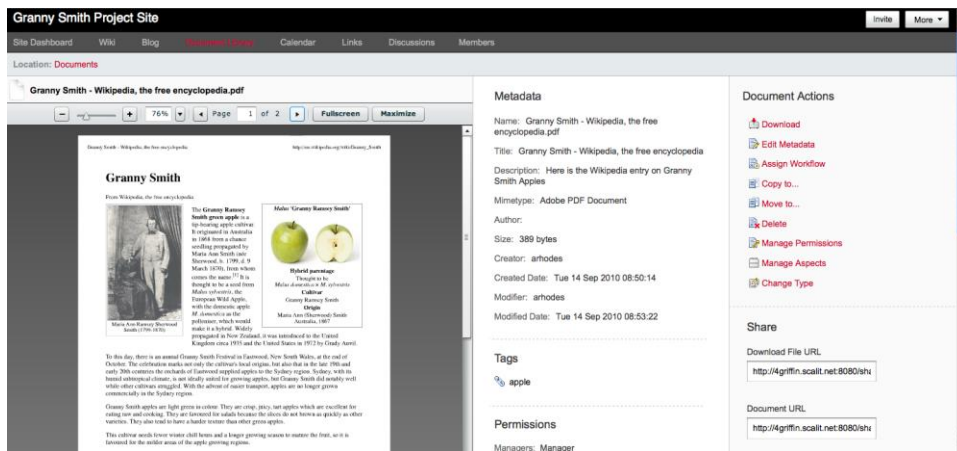
On the resulting pop up dialogue box, you can add a more complete description of the document in the library, modify the name or title (if needed), and even add a tag to the document. Tags enable quick and easy bundling of documents for easy searches and grouping. For example, you could create a tag by topic, customer name, or anything that works for your specific group’s needs.



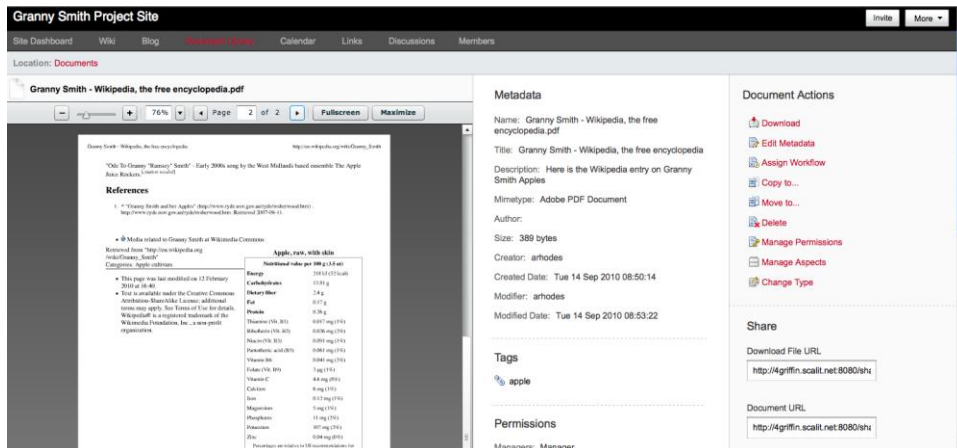
From within your "Document Library" screen, click on the link of a document's name.



The resulting screen allows you to preview your document without opening its associated program, quickly and easily.



You can even scroll through your document's pages within this screen:



Comments regarding the document may be added here:

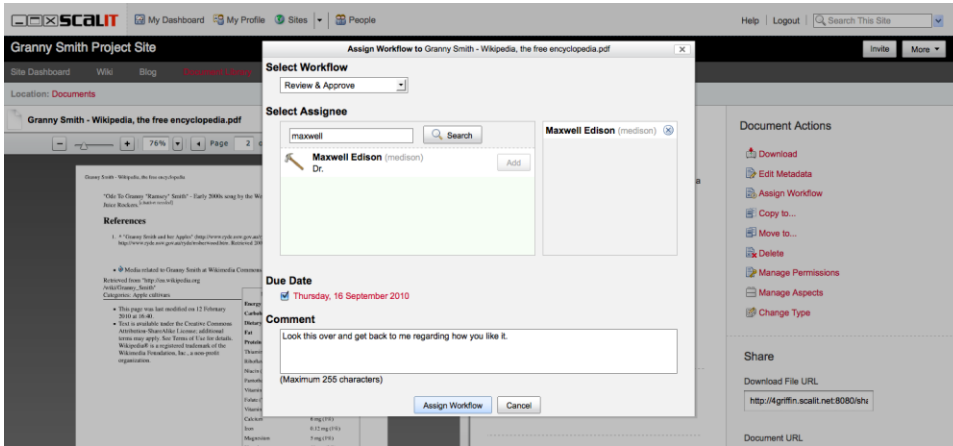
This screenshot shows a document viewer interface. On the left, a document preview is visible with a page number '2 of 2' and a timestamp '2/14/2010 11:58:02 AM'. Below the preview, a comment section indicates 'No comments so far' and 'Showing items 0 - 0 of 0'. A 'Add Comment' form is present with a rich text editor containing the text 'We can keep this as a reference.' and a 'Create Comment' button. On the right, a sidebar contains 'Permissions' (Managers: Manager, Collaborators: Collaborator, Consumers: Consumer, Everyone: Read) and 'Version History' (Version 1.0, Tue 14 Sep 2010 11:50:14, Modified by: Abbey Rhodes, Comment: [redacted], Download button).

This screenshot shows the same document viewer interface, but the comment section now displays one comment. The comment is from 'Abbey Rhodes' and says 'We can keep this as a reference.' It includes an 'Edit' button and a 'Delete' button. The 'Posted on' date is 'Tue 14 Sep 2010 11:54:49'. The 'Add Comment' form is still visible below the comment.

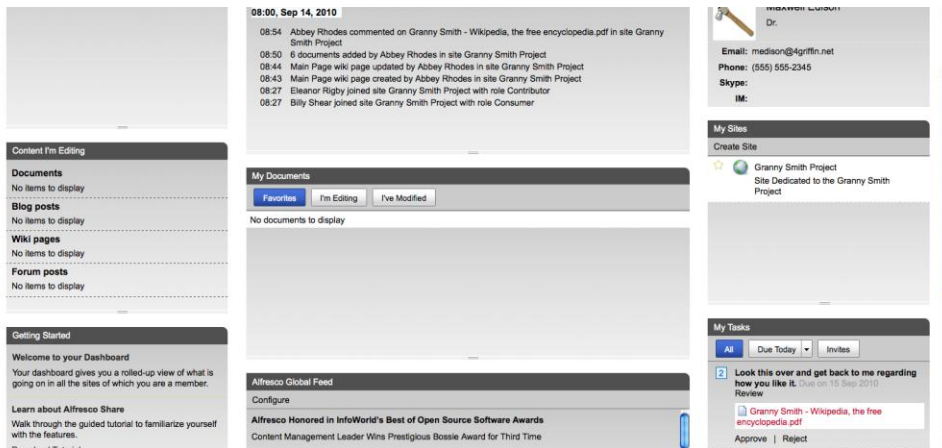
Team members (with appropriate permissions) can assign workflows to documents for other users. While in the document preview screen, click on the “Assign Workflow” link:

This screenshot shows the Scalit web application interface. The top navigation bar includes 'My Dashboard', 'My Profile', 'Sites', and 'People'. The main content area is titled 'Granny Smith Project Site' and shows a document preview of 'Granny Smith - Wikipedia, the free encyclopedia.pdf'. The document content includes a title, description, and a list of references. On the right, a sidebar contains 'Metadata' (Name, Title, Description, Mimetype, Author, Size, Creator, Created Date, Modified Date) and 'Document Actions' (Download, Edit Metadata, Assign Workflow, Copy to..., Move to..., Delete, Manage Permissions, Manage Aspects, Change Type). A 'Share' section at the bottom right shows the 'Download File URL' as 'http://4griffin.scalit.net/8080/shd'.

Then, select the desired workflow, team member, due date, and instructions (comment). Click on the “Assign Workflow” button.

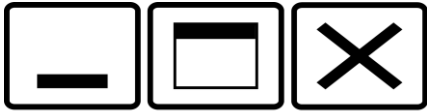


The next time the person assigned the workflow logs in to the ScallIT File and Document Management application, their “My Dashboard” screen will show them this new assignment waiting for them (see below).



As this tutorial has outlined, sharing and storing documents and collaborating with others in your company has never been easier. Other features of collaboration sites include blogging, team calendars, shared links, and group discussion spaces. These features can be accessed from the top of any "Site Dashboard," and are easily modified. Use these features, along with all of the others explained earlier, in order to better run and organize your company file system. Almost everything you can create or add to company sites can be easily searched for, as well as tagged for easy searches and bundling.

Now that you understand how the ScalIT File and Document Management application works, you will wonder how you ever got along without it!



SCALIT

*Technology that
Fits Your Business*

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