



Alfresco DMS Integration for Microsoft Office

# Product Documentation

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# 1. Overview

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Alfrodin® is an add-in for Microsoft Office that provides a direct connection to Alfresco Content Services. Users can manage documents, archive emails, process workflows, and collaborate with their team – all from within the familiar Office interface.

Alfrodin supports Outlook, Word, Excel, and PowerPoint and is available in three languages: German, English, and Spanish. The language can be changed at any time in the settings.

## 2. System Requirements

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### Microsoft Office

- Microsoft 365 (Desktop and Web)
- Office 2021 or later
- Supported applications: Outlook, Word, Excel, PowerPoint
- Supported platforms: Windows, macOS, Web (Office Online)

Alfrodin requires Microsoft Edge WebView2, which is automatically installed with Microsoft 365 and Office 2021. Older Office versions (2019 and earlier) use an outdated browser engine and are not supported.

### Alfresco Server

- Alfresco Community or Enterprise, version 6.x, 7.x, or 23.x
- HTTPS access from the user's network
- Alfresco REST API must be enabled

## 3. Installation and Setup

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Alfrodin consists of two add-ins in the Microsoft Store: Alfrodin-Outlook for Microsoft Outlook and Alfrodin-Office for Word, Excel, and PowerPoint.

### Individual Installation

1. Open Outlook, Word, Excel, or PowerPoint.
2. In the menu, click Insert → Get Add-ins (or My Add-ins).

3. Search for "Alfrodin".
4. Click "Add".

## Centralized Deployment (IT Administrators)

1. Open the Microsoft 365 Admin Center.
2. Navigate to Settings → Integrated Apps.
3. Search for "Alfrodin" or upload the manifest.
4. Deploy to the desired users or groups.

## 4. Login and Authentication

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The login page offers two tabs: Password for direct authentication with the Alfresco server and Identity Provider (OIDC) for authentication via a central identity service.

### Password Login

The user enters the server URL, username, and password. Alfrodin connects via the Alfresco REST API. Stored credentials are protected locally with AES-256-GCM encryption (key derivation via PBKDF2 with 100,000 iterations and SHA-256). When the add-in is reopened, login occurs automatically.

### Identity Provider (OIDC)

Organizations that use a central identity service (e.g., Keycloak) can authenticate via the OpenID Connect protocol (OIDC). The user enters the connection details provided by the administrator:

- Keycloak URL: The address of the identity provider (e.g., <https://idp.example.com>)
- Realm: The realm within the identity provider (e.g., master)
- Client ID: The identifier of the Alfrodin application at the identity provider (default: alfrodin)
- Alfresco Server URL: The address of the Alfresco server

After clicking "Sign in," a browser window opens with the identity provider's login page. The user signs in with their usual credentials and is then automatically redirected back to the add-in. The connection details can be saved via "Remember connection" - when reopened, login then occurs automatically.

The OIDC login uses the secure Authorization Code Flow with PKCE and is compatible with any OpenID Connect-compliant identity service.

## Single Sign-On (SSO) for License Recognition

Alfrodin supports Single Sign-On via Microsoft Entra ID using Nested App Authentication (NAA). If the user's organization uses Entra ID, the SSO identity is used for license recognition and association with Microsoft 365 subscriptions.

## Licensing

Alfrodin offers a free 3-day trial without a credit card. After the trial, the following licensing options are available:

- Microsoft AppSource: License through the Microsoft 365 subscription
- Direct Purchase: License key in the format ALF-XXXX-XXXX-XXXX-XXXX, activatable in the add-in

A license key is tied to one email address and is valid for an unlimited number of devices and Office applications.

## 5. Sites

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The site overview is the central entry point after login and offers three areas: All Sites, Favorites, and Activities.

### All Sites

Displays all Alfresco sites accessible to the user, showing the respective role (Manager, Collaborator, Contributor, Consumer) and visibility (public, private, moderated). A search bar allows quick filtering by site name.

### Favorites

Lists all sites favorited by the user. The star button on each site card allows sites to be marked or unmarked as favorites. Changes take effect immediately.

### Activities

A chronological feed shows all user activities grouped by time period (Today, Yesterday, This Week, Earlier). Each entry displays the user (with profile photo or initials avatar), the type of action, and the affected file or folder. Supported activity types include adding, modifying, and deleting files, creating folders, writing comments, previews, downloads, and membership changes. A search filter allows narrowing by person, site, or filename.

## 6. Folders and Files

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### Navigation

After opening a site, the folder structure is displayed. A breadcrumb bar allows quick navigation to parent levels. Folders are shown separately from files (folders first, files below).

### Creating Folders and Uploading Files

A toolbar button allows creating a new folder in the current directory. Files can be uploaded via drag & drop or the upload button. Multiple file selection is supported.

### Deleting

Items are first moved to the recycle bin (soft delete). In the recycle bin, they can be restored or permanently removed.

### Copy and Move

Files and folders can be copied or moved to another location. A folder browser allows navigating through sites and subfolders. A new folder can also be created directly in the destination dialog. With multi-selection, several items can be copied or moved simultaneously. Moving requires the appropriate permissions.

### ZIP Download

Individual files are downloaded directly. For folders or a multi-selection, Alfrodin creates a ZIP archive. Progress is displayed during creation.

## 7. Document and Folder Details

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When opening the detail view of a document or folder, a toolbar provides the following actions:

- Favorite: Mark or unmark an item as a favorite
- Preview: View document content directly in the add-in
- Rename: Rename a file or folder (the filename without extension is automatically pre-selected)
- Download: Download a file (folders are downloaded as ZIP archives)

- Share Link: Create or remove a public sharing link, optionally with an expiration date
- Open in App: Open the document in the associated Office desktop application
- Copy / Move: Copy or move the item to another location
- Delete: Move the item to the recycle bin

## Properties

The properties tab shows metadata such as filename, type, size, creation and modification dates, and the respective editor. Tags can also be managed here.

## Preview with Navigation

The preview supports various file formats: images (JPG, PNG, GIF, SVG, WebP), PDF, text files (JSON, XML, JavaScript, plain text), and Office documents (Word, Excel, PowerPoint). Forward and back buttons allow navigating directly to the next or previous document in the same folder. Keyboard navigation with arrow keys is also supported.

# 8. Version Management

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The versions tab shows the complete version history of a file. Each version displays the version number, file size, date, and editor. The current version is marked with a badge. Previous versions can be individually downloaded or restored.

## 9. Comments

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Alfrodin provides full commenting functionality for files and folders. The comments tab displays the number of existing comments as a counter. Users can create new comments (using Ctrl+Enter to submit), edit or delete existing comments. Edited comments are marked with a corresponding indicator. Older comments can be loaded via “Load more.”

# 10. Tags and Tag Search

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## Managing Tags

In the properties tab, tags can be added to or removed from files and folders. When adding tags, an autocomplete feature suggests existing repository tags.

## Tag Cloud

The search view displays a tag cloud with all available tags as clickable elements. Clicking a tag immediately starts a filtered search.

## Multi-Tag Filter

Using the tag picker in the search bar, multiple tags can be combined as filters (AND logic). Active tag filters are shown as chips and can be removed individually or all at once.

# 11. Search and Filters

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## Full-Text Search

Alfrodin searches all Alfresco content via full-text search. Results are displayed with the complete path and can be opened directly.

## Advanced Filters

In addition to full-text search, the following filter options are available:

- File type: PDF, Word, Excel, PowerPoint, images, text (multi-select available)
- Modification date: Today, last week, last month, last 3 months, last year
- File size: Under 1 MB, 1-10 MB, 10-100 MB, over 100 MB
- Item type: Files only, folders only, or both

Active filters are shown as chips in the filter bar and can be removed individually. Tag filters and advanced filters can be freely combined.

# 12. Outlook Integration

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## Email Archiving

In Outlook, Alfrodin displays an email panel with the subject of the currently selected email. The email can be archived to any Alfresco folder with a single click.

## Extracting Attachments

Email attachments can be saved to Alfresco individually or all at once.

## Batch Upload

When multiple emails are selected, Alfrodin enables the simultaneous upload of all selected messages.

## Collapsible Email Panel

The email panel can be collapsed to a compact bar (mail icon and subject) via the close button. Clicking the bar expands it again. The state persists when navigating between folders.

# 13. Word, Excel, and PowerPoint Integration

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In Word, Excel, and PowerPoint, Alfrodin provides the following functions:

- Save Document: Upload the currently open document directly to an Alfresco folder
- Open Document: Open a file from Alfresco in the associated Office desktop application

# 14. Workflows and Tasks

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## Task Overview

Alfrodin displays tasks assigned to the user in two categories: My Tasks (personally assigned tasks) and Pool Tasks (tasks available to a group).

## Task Processing

Depending on the task type, various actions are available: Complete, Approve, Reject, Claim, or Release.

## Starting a Workflow

Users can start a new workflow directly from the add-in. The workflow type, description, priority, due date, and assignees are configured. A person and group search facilitates selection. Documents can be attached to the workflow.

## 15. Settings

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### User Profile and Appearance

In the first section of the settings, the user can view and edit their Alfresco profile. The profile includes a profile photo (with upload capability), personal details such as name, email, position, location, and phone numbers, as well as company information such as organization, address, and company phone. For LDAP-managed accounts, the profile is displayed as read-only.

The user can also choose the appearance (light, dark, or system theme) and language (German, English, or Spanish) here.

The license section displays the current license status, license source, plan name, and – for direct licenses – the license key and associated email address. A license key can also be released here.

### Connection and Diagnostics

The second section shows connection information (server URL, username) and Alfresco server details (version, edition). Stored credentials can be deleted here.

The diagnostics section allows exporting and deleting log files as well as setting the log level (Debug, Info, Warning, Errors only). Finally, the app version, publisher, website, and support email address are displayed.

## 16. Pricing and Licensing

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For current pricing and licensing options, please visit [www.alfrodin.com](http://www.alfrodin.com).

## Contact and Support

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For questions, suggestions, or technical issues, our support team is happy to help:

- Email: [office@mbasoft.at](mailto:office@mbasoft.at)
- Website: [www.alfrodin.com](http://www.alfrodin.com)
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