



Quickstart Guide

Alfresco Workdesk Community



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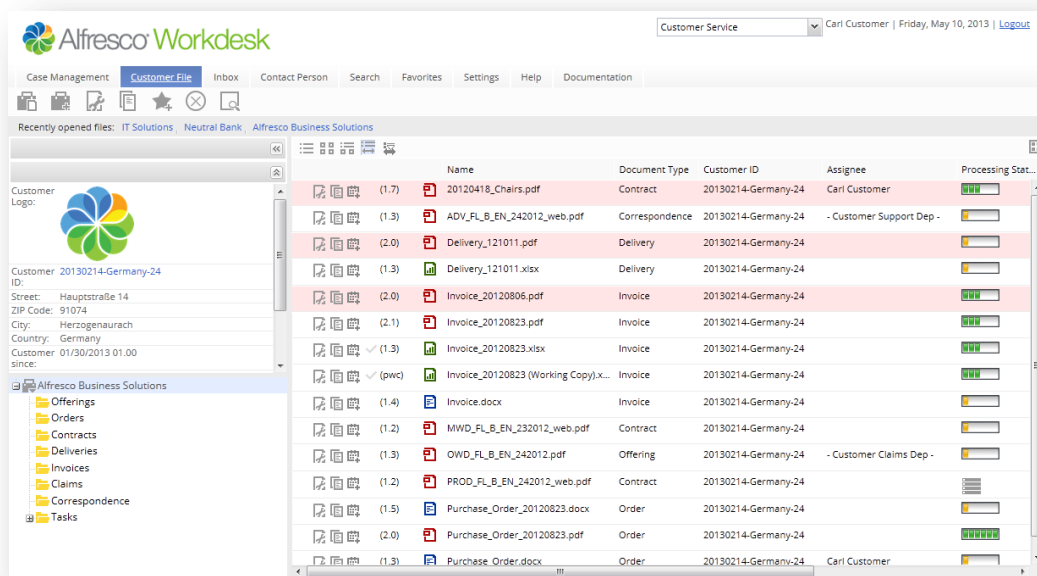
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Introduction

Thank you for downloading Alfresco Workdesk Community. This Quickstart Guide is designed to help you deploy Alfresco Workdesk Community rapidly on a web server and to start exploring the capabilities of Alfresco Workdesk.

- The default configuration of this Alfresco Workdesk Community is a basic scenario connecting against a local Alfresco Repository over CMIS.



- With a few simple steps you can setup a preconfigured Human Ressources Application in Workdesk. The necessary steps are described in ***Setting up a Human Resources Application***. This solution is an example configuration to give you an introduction to Alfresco Workdesk. If you want to explore more functionality we encourage you to work through the Tutorial that is delivered as part of this Community Version.

If you have any problems or want further information, visit the Alfresco User Community. **Help and further information** explains how to get there.

Have fun with your installation of Alfresco Workdesk Community. We look forward and appreciate your feedback.

Setting up Alfresco Workdesk Community

This section describes how to set up the environment for Alfresco Workdesk Community.

Check the local environment

Web application server

Workdesk requires a Java runtime environment (JRE) version 1.6.x or later, provided by Sun or Oracle. Workdesk Community runs on an Apache Tomcat web server in version 6.0.35 or later, which can be downloaded from <http://tomcat.apache.org>. You can also deploy Workdesk on the Tomcat server that is delivered with the Alfresco Community Edition.

For more information on supported platforms, go to:

<http://www.alfresco.com/services/subscription/supported-platforms>

Alfresco Community Edition

In this guide we assume that you connect Workdesk to an Alfresco Repository Version 4.x, however Workdesk is designed to run on top of any CMIS-compliant repository. You can download the latest version of Alfresco Community Edition from the following location:

<http://www.alfresco.com/products/community>

Deploy Alfresco Workdesk Community

This section describes how to deploy Workdesk on an Apache Tomcat web server.

Unzip the Alfresco Workdesk Community delivery file into a temporary folder, copy the folder `workdesk` from `(Delivery)\bin\` and paste it into your Apache Tomcat directory `(Tomcat)\webapps` to deploy Workdesk.

That's it. Start a basic configuration of Workdesk Community by opening the following URL:

<http://localhost:8080/workdesk>

Select your favourite language and login as any Alfresco user.

If you are upgrading from a former version of Workdesk or you have other issues concerning the installation process, please consult the [Alfresco Workdesk Community Forum](#).

Setting up a Human Resources Application

Alfresco Workdesk Community is delivered with a preconfigured fully functional Human Resources Application. In order to activate this scenario the Alfresco repository needs to be populated with a custom model as well as some sample documents and the configuration of Workdesk Community needs to be switched to the new configuration. This chapter describes the necessary steps.

The screenshot displays the Alfresco Workdesk Community web application. At the top, the Alfresco logo and 'Workdesk' text are visible, along with a user status bar indicating 'admin | Thursday, June 13, 2013 | Logout'. Below this is a navigation menu with tabs: 'Dossiers', 'Dossiers (register mode)', 'Browse', 'Search', 'Settings', 'Favorites', and 'Help'. The main content area is titled 'Recently opened files: Stefan Waldhauser Sabrina Dingfelder'. On the left, a sidebar shows a 'Dossier Picture' of a man, followed by personal details: 'Personnel Number: 234567', 'Last Name: Waldhauser', 'First Name: Stefan', and 'Dossier Status: Active'. Below this is a tree view of the dossier structure, including folders for 'Terms of Employment', 'Remuneration', 'Employment History', 'Application Paper', 'Certificate', 'Social Security', 'Sick Certificate', and 'Pictures'. The main panel on the right displays a table of documents for the selected dossier.

Name	Personnel Num...	Type	Date Last Modified
stwa picture.gif	234567	Picture	06/13/2013 13.05
Curriculum Vitae.doc	234567	Employment History	06/13/2013 13.05
Appraisal for Waldhauser.pdf	234567	Application Paper	06/13/2013 13.05
Employee Contract.pdf	234567	Application Paper	06/13/2013 13.05
List of employees.pdf	234567	Remuneration	06/13/2013 13.05
Documents and Business Pro...	234567	Certificate	06/13/2013 13.05

Switch Workdesk Community Configuration

The Human Resources application is already preconfigured within Workdesk Community. To activate it, switch from the `opencmis` default configuration set to the `opencmis_hr` configuration set. Open the file `(Workdesk) WEB-INF\ web.xml`, comment out the `opencmis` configuration and remove comments for the `opencmis_hr` configuration. You can easily switch configurations back and forth like this. Make sure only one configuration is active like in the following example:

```

<context-param id="OwResourceFilePath">

    <param-name>OwResourceFilePath</param-name>

    <!-- Configuration "dummy": Test environment with full functionality ... -->
    <!-- <param-value>deploy#WEB-INF/conf/dummy</param-value> -->

    <!-- Configuration OpenCMIS: Apache Chemistry OpenCMIS (opencmis.OwCMISNetwork) -->
    <!-- <param-value>deploy#WEB-INF/conf/opencmis</param-value> -->

    <!-- Configuration OpenCMIS: Apache Chemistry OpenCMIS (opencmis.OwCMISNetwork)
        + Sample Application - Human Ressources Applicatoion -->
    <param-value>deploy#WEB-INF/conf/opencmis_hr</param-value>

</context-param>

```

Populate the Alfresco Repository

Before you can start using the Human Resources application in Workdesk you will need to populate your Alfresco repository with example documents and a custom model. To do this, simply run `install-owd-hr.bat` (for Windows OS) or `install-owd-hr.sh` (for Linux OS). Both scripts can be found in `(Delivery)\bin\Sample Application\Human Resources Application\` and can be executed inside a Windows command window or the Linux shell with the following parameters.

Windows OS:

```
install-owd-hr.bat -ap <alfresco_path> -u <user_name> -p <password>
```

Linux OS:

```
sudo install-owd-hr.sh -ap <alfresco_path> -u <user_name> -p <password>
```

⚠ If you are running Windows Vista or Windows 7, please ensure to open the command line window (cmd.exe) as administrator, by right-clicking on cmd.exe and selecting "Run as administrator".

⚠ If the script can't locate your java executable, you have to add the path of your java runtime executable to the PATH environment variable.

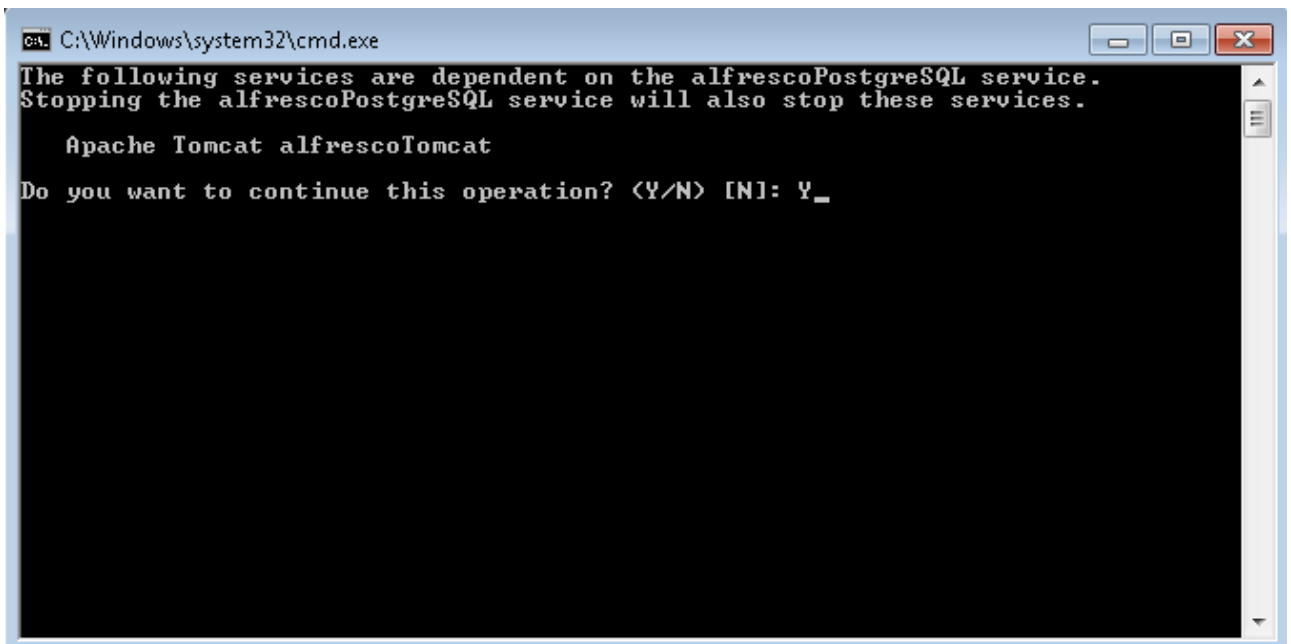
⚠ The parameter <alfresco_path> must point to the installation path of your Alfresco installation, <user_name> and <password> are the administrative user name and the corresponding password of your Alfresco installation.

Examples:

```
install-owd-hr.bat -ap C:\Alfresco -u admin -p adminpw  
sudo install-owd-hr.sh -ap /opt/alfresco -u admin -p adminpw
```

The script will populate your Alfresco repository with data, which is required for the Human Resources application to run. We recommend to run the script on a clean Alfresco Community or to backup your Alfresco installation.

If during execution of the script a new command line window opens and you get prompted to confirm to stop Apache Tomcat service, reply “Y”:



```
C:\Windows\system32\cmd.exe  
The following services are dependent on the alfrescoPostgreSQL service.  
Stopping the alfrescoPostgreSQL service will also stop these services.  
  
Apache Tomcat alfrescoTomcat  
Do you want to continue this operation? <Y/N> [N]: Y_
```

The Script should finish with the statement “Successfully ran Workdesk Human Resources application installer...” like in the following screen shot for Windows operating systems:

```
Administrator: C:\Windows\system32\cmd.exe
2013-06-14 11:32:32,625 [main] INFO OwOpenAir [] - Property owd:dossierPicture - [/HR/Dossiers/Dennis Koch/deko picture.jpg]
2013-06-14 11:32:32,688 [main] INFO OwOpenAir [] - set props for /HR/Dossiers/Ben Bachtal
2013-06-14 11:32:32,704 [main] INFO OwOpenAir [] - Property owd:dossierPicture - [/HR/Dossiers/Ben Bachtal/beba picture.png]
2013-06-14 11:32:32,813 [main] INFO OwOpenAir [] - set props for /HR/Dossiers/Sabrina Dingfelder
2013-06-14 11:32:32,844 [main] INFO OwOpenAir [] - Property owd:dossierPicture - [/HR/Dossiers/Sabrina Dingfelder/sadi picture.jpg]
2013-06-14 11:32:32,954 [main] INFO OwOpenAir [] - set props for /HR/Dossiers/Doru Sular
2013-06-14 11:32:32,985 [main] INFO OwOpenAir [] - Property owd:dossierPicture - [/HR/Dossiers/Doru Sular/dosu picture.jpg]
2013-06-14 11:32:33,063 [main] INFO OwOpenAir [] - set props for /HR/Dossiers/Martin Kappel
2013-06-14 11:32:33,079 [main] INFO OwOpenAir [] - Property owd:dossierPicture - [/HR/Dossiers/Martin Kappel/maka picture.jpg]
2013-06-14 11:32:33,141 [main] INFO OwOpenAir [] - Stopping [Alfresco 3xx data batch action ]
2013-06-14 11:32:33,157 [main] INFO OwOpenAir [] - Successfully ran Workdesk Human Resources application installer @ Alfresco Community Edition 4.2.x
C:\openair>
```

⚠ The script may run several minutes, as it populates the Alfresco repository with a lot of documents. Please do not abort the script.

⚠ If the script fails you will have to delete the folder containing the log files as well as the custom models, delete:

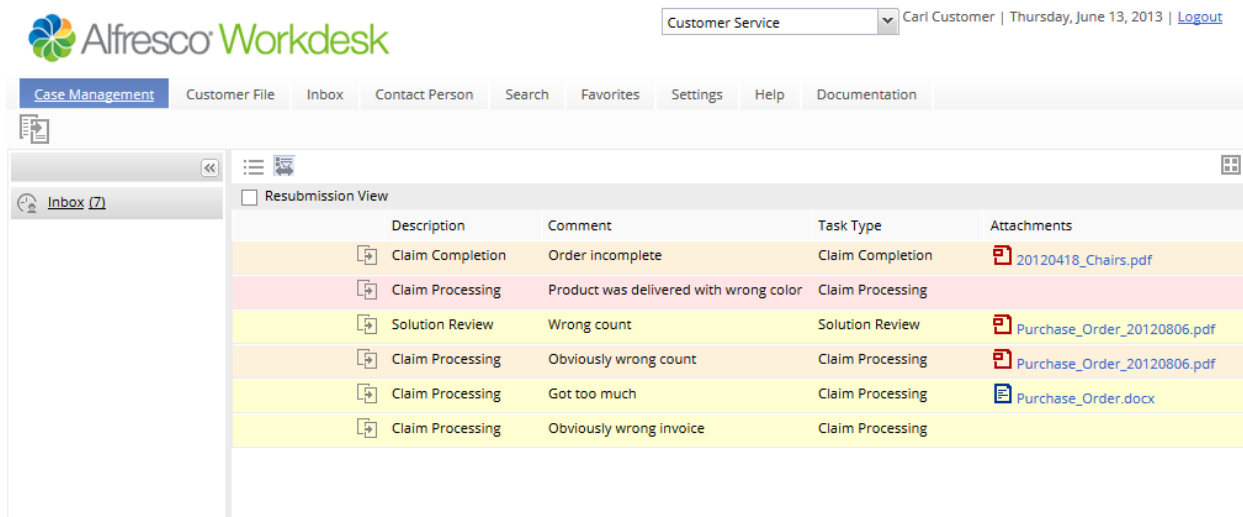
(Alfresco) \oat

(Tomcat) \shared\classes\alfresco\extension\workdesk*.xml

After restarting your Workdesk deployment, you are ready to access the HR application and log-in with any user in the Alfresco Repository: <http://localhost:8080/workdesk>

Workflow and Case-Management

Workdesk Community fully leverages Alfresco Workflow for Advanced Case Management Solutions.



The screenshot displays the Alfresco Workdesk interface. At the top, the Alfresco Workdesk logo is on the left, and a dropdown menu set to 'Customer Service' is on the right, followed by the user 'Carl Customer' and the date 'Thursday, June 13, 2013' with a 'Logout' link. Below this is a navigation bar with tabs: 'Case Management' (selected), 'Customer File', 'Inbox', 'Contact Person', 'Search', 'Favorites', 'Settings', 'Help', and 'Documentation'. The main content area shows a table with columns: 'Description', 'Comment', 'Task Type', and 'Attachments'. The table lists several tasks, including 'Claim Completion', 'Claim Processing', and 'Solution Review', each with associated comments and attachments like '20120418_Chairs.pdf' and 'Purchase_Order_20120806.pdf'. A 'Resubmission View' checkbox is visible above the table.

Description	Comment	Task Type	Attachments
Claim Completion	Order incomplete	Claim Completion	20120418_Chairs.pdf
Claim Processing	Product was delivered with wrong color	Claim Processing	
Solution Review	Wrong count	Solution Review	Purchase_Order_20120806.pdf
Claim Processing	Obviously wrong count	Claim Processing	Purchase_Order_20120806.pdf
Claim Processing	Got too much	Claim Processing	Purchase_Order.docx
Claim Processing	Obviously wrong invoice	Claim Processing	

If you want to setup Workdesk for Alfresco Workflow please refer to the *Configuration and Planning Guide* available at <http://docs.alfresco.com>.

To have a look at a preconfigured Case-Management Scenario we encourage you to download the Alfresco Workdesk Enterprise Trial from <http://www.alfresco.com/products/workdesk>.

Help and further information

Now that you've got a first impression you might want to learn more about Workdesk. The Human Resources Application is only one example and Alfresco Workdesk can be configured for any other business context, like customer management, insurance application for controlling insurance claims, banking solution for loan applications, account handling, or any other business.

If you need any help or would like to have more information, see the following information sources.

Tutorial

We encourage you to build your own solution starting with the Tutorial that is delivered as part of Workdesk Community. It will help you configuring Workdesk to your specific needs and business cases.

Forums

If you have any problems when installing the Alfresco Workdesk Community, browse the different Workdesk threads on our forum at:

<http://forums.alfresco.com>

Technical Documentation

This Quickstart Guide describes how to setup a preconfigured Alfresco Workdesk environment, however, for additional, in-depth technical documentation about Alfresco Workdesk, go to:

<http://docs.alfresco.com>

- See the *Installation Guide* to plan your installation.
- See the *Configuration and Planning Guide* to learn about Workdesk configuration, and how to transform the generic Workdesk into a specific application.

Abbreviations

AWD	Alfresco Workdesk
CMIS	Content Management Interoperability Services
ECM	Enterprise Content Management
HR	Human Resources

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