

Introduction to Alfresco Share 3.3 Rules Management

Alfresco Share 3.3 Rules Management

One new feature of Alfresco Share 3.3 is the ability to set rules on spaces or folders. This was a capability available in the Alfresco Explorer (JSF) client, but which has not been available in Share until this release.

The demonstration that I'll do now is using a version of Alfresco 3.3 built from Alfresco source control. So this is a preview of what to expect in 3.3.

Location of Rules within Share

Here I first login to Share as the administrator. Rules are associated with the folders or spaces within Alfresco. So I'll go into a Share site that I have already built called Operations.

Also new in Alfresco Share since 3.2 is the ability to access the Alfresco repository directly from within Share. This lets you see all folders of the repository, not only the Share document library for sites.

But for the demonstration, I'm going to just navigate into a folder within the document library for this Share site. Here's a folder called Presentations and Collateral. I'll click into that. And I see two subfolders called 'For Internal Release' and 'For Public Release'.

I'm going to define a rule for the 'For Internal Release Folder'. There are two ways to get to the Rule definition screen. Under More there is a Manage Rules action, or I can click into View Details and from the Details page I can select Manage Rules.

I'm on a preliminary Rule page for the folder here. I can decide whether I want to link to a rule set that has previously been defined for another folder, or I can define a new set of rules. Well, I don't have any rules just yet, so I decide to create a new rule.



Creating a Rule

On this page I can define a new rule for the Folder. I'll create a simple rule that assigns the Versionable aspect to all documents that are placed in this folder. I'll enter a name and description.

Then I can decide if the rule will apply to documents entering the folder, those that are updated or changed, or those that are deleted or moved from the folder.

The rule lets me define criteria about the document as to whether or not the rule should be run. Based on some metadata of the document like the name, title, creation date or other characteristic, I can specify the criteria.

If I select a date criteria there are additional parameters that I need to fill out as you can see here. If the metadata is a text string, I can specify matching criteria for that text. Notice the warning triangle to the left. That will go away once I have completed all of the parameters.

Other interesting types of criteria could be based on tags, categories or aspects. There are many types of metadata that you might want to check. And a fairly comprehensive list is available when you click on show more.

For example, if I look at the attributes of the Alfresco Content type, I could choose to perform the rule based on the mimetype of the document. Clicking on the checkbox will show the option in the criteria pulldown on the New Rule screen.

In this case, I'll just choose All items. In a similar way I could choose criteria that are not met by the documents.

Finally I select an action to be performed. Here I can do things like execute a script, check in or checkout, add an aspect, et cetera.

In this simple case, I'm going to add the Versionable aspect.

On the bottom I can activate or deactivate this rule or decide if this rule should be run against subfolders of this folder. There is also an option to run the rule in the background. In which case, should an error occur, a script will be run. I'm not going to do that right now though.

When I click create, the rule is added. And here we see the rule. On the right you can see that it is active and that it should be applied against subfolders. And the complete



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definition of the rule is shown. In the upper right, you can see that it's possible to test the newly defined rule.

Testing the Rule

Let's go into the folder now and test it out.

Let me upload a document. I'll select the Word document called NestedGroups. I click Upload and OK. And the document is now in the folder.

I can click through on the document to preview it in the Alfresco Flash viewer. Here I can see that the Versionable aspect has been applied to the document.

I'll move back up to the parent folder now. You can see the marking on the left of the folder icon that designates that a rule is attached to this folder.

Creating a Second Rule

I'll go back into the rule screen for the folder. Now let's create a new rule for the folder. This time I'll create a rule that will transform the document on load into a PDF file that is copied over to a release area.

I'll define the name and description. In this case, for demonstration reasons, I'll just look for documents that include the text 'Security' as part of their file name.

I select 'Transform and Copy Image' and then select PDF as the output format type. And I select a destination for the transformed document.

I create the rule and come back to the Rules page for the folder. I can see that both of the rules I created are in the list. Depending on which rule is highlighted, the rule definition will change on the right.

Applying Multiple Rule

I'm also able to reorder the list of rules. Rules are applied sequentially.

Let's go back into the folder and try it out. I'll select a file called SecurityReview. The file has Security as part of its name, so the new rule should be applied to it. I upload the file.

I can look at the file preview and details. Let me go into the Public Release folder to see if the new PDF file has been created. Here it is. Now let's look at the details for it. You can also see that it has the Versionable aspect applied to it.



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Sequencing Multiple Rule

If we navigate back to the folder with the rule set, we can do an experiment where we swap the order of the rules being applied. Let's make it so that the file is first transformed and copied to the release area. Then the Versionable aspect will be applied to the original document. In that case, we wouldn't expect the PDF rendition to be Versionable.

We go back and upload another file with a name containing 'Security'.

Here is the uploaded file. Now let me go over to the Release area. Here is the new PDF. When I check to see which aspects are attached to it, Versionable is not there. So that worked, as expected.

Linking to a Rule

Finally let me show you that rules can be reused and reapplied to other folders. You do this by creating a rule link. I'll demonstrate this with the parent folder.

Let me go into the Rule set definition page for this folder. The second option listed here is "Link to Rule Set". Let me choose that one.

This works a bit differently than you might expect. Rather than see a list of your rule sets, you need to navigate to the folder in which you've previously defined the rule set.

Here is the folder. And you can see the rules that I defined for it. You're not able to just pick one of the rules, you need to link to the whole rule set.

So, I click on 'Link'. And here you can see the linked rule set. It shows the folder where the rules were originally defined. And clicking on View Rule Set, I can see the rule definition.

Conclusion

And that concludes this demonstration of the Folder Rules Management feature in Alfresco Share release 3.3. Thanks for watching.



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