



Add-In for Microsoft Office and Alfresco

Product Documentation

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1. Introduction

Alfrodin® is a powerful add-in for Microsoft Office that connects Outlook, Word, Excel, and PowerPoint directly to Alfresco Content Services. It combines the familiarity of Microsoft Office with the power of an enterprise content management solution, enabling users to manage documents, archive emails, start workflows, and collaborate with their teams without ever leaving their Office applications. The solution provides a seamless bridge between the well-known Office ecosystem and the comprehensive Alfresco content management system.

Alfrodin consists of two specialized add-ins: Alfrodin-Outlook for email management and document archiving, and Alfrodin-Office for Word, Excel, and PowerPoint. Both add-ins work seamlessly with Alfresco and provide a consistent user interface across all Office applications. The user interface was designed intuitively so that even less technically experienced users can quickly work with it. Each application has its specialized functionality, precisely tailored to the requirements of the respective Office application.

The system is available in four languages: German, English, French, and Spanish. Users can switch their preferred language at any time in the settings, and the entire user interface updates immediately. This multilingual support enables teams with international members to collaborate effectively. Regardless of what language you speak, you can use Alfrodin fully without ever encountering an unfamiliar interface.

Alfrodin was specifically designed for companies that work with Microsoft 365 or local Office versions while simultaneously managing their content in Alfresco. The integration is so comprehensive that users never need to switch between different applications. All required functions are directly accessible in Office, which significantly simplifies the workflow and increases productivity.

2. System Requirements

Alfrodin requires a modern environment to function optimally. System requirements ensure compatibility, security, and optimal performance. Before installing and using Alfrodin, please verify that your system meets all listed requirements. This ensures that you get the best possible experience with the application.

Microsoft Office

Alfrodin supports Microsoft 365 (both desktop and web versions) as well as Office 2021 and later versions. The following applications are supported: Outlook, Word, Excel, and PowerPoint. The system runs on Windows, macOS, and in web browsers (for Office Online). To ensure the user interface displays correctly, Microsoft Edge WebView2 is

required, which is automatically installed with Microsoft 365 and Office 2021+. Older Office versions (2019 and earlier) use an outdated browser engine and are therefore not supported.

Microsoft 365 is a cloud-based subscription service that is regularly updated and contains the latest features. Office 2021 is a stand-alone version that also works but does not receive constant updates. Both versions are supported by Alfrodin, with Microsoft 365 offering slightly better integration.

Alfresco Content Services

Alfrodin works with Alfresco Community Edition or Enterprise Edition in versions 6.x, 7.x, and 23.x. The Alfresco server must be accessible via HTTPS and the REST API must be enabled. This is the standard configuration for most Alfresco installations, but system administrators should confirm this. The REST API is the communication protocol between Alfrodin and Alfresco, so its activation is mandatory.

For larger deployments, we recommend Alfresco Enterprise Edition, which offers higher-value technical support and advanced features. The Community Edition is, however, fully compatible and ideal for smaller organizations or test installations. Make sure your Alfresco server is accessible via a secure HTTPS connection to ensure the security of all data transmissions.

3. Installation and Setup

Alfrodin consists of two separate add-ins that can be installed independently. This modularity gives organizations flexibility in deployment. You can install Alfrodin-Outlook or Alfrodin-Office individually, depending on which functionality you need. In most cases, however, both add-ins are required to use the full functionality.

Individual Installation

Each user can install Alfrodin themselves without requiring administrator rights. Open the desired Office application (Outlook, Word, Excel, or PowerPoint), go to the Insert menu, and select Get Add-ins (or My Add-ins in older versions). Type "Alfrodin" into the search box, find the appropriate add-in in the results, and click Add. The installation completes immediately and the add-in is ready to use.

Installation is completely free (except for the license to use the product) and can be done at any time. When you use Alfrodin for the first time, you may be asked to grant the application the necessary permissions. These permissions are necessary to access your Office applications and your Alfresco instance.

Centralized Deployment

For larger organizations, centralized deployment is recommended. Administrators open the Microsoft 365 Admin Center, navigate to Settings > Integrated Apps, and search for "Alfrodin" in the catalog. Because Alfrodin is officially published on the Microsoft Marketplace, uploading a manifest file is no longer required — the add-in can be selected directly from the catalog and distributed to specific users, user groups, or the entire organization. This is particularly convenient for compliance and control, as administrators can ensure that all users use the same version and all required configurations are set correctly.

Centralized deployment saves time and allows IT administrators to create a standardized environment. All users in the organization automatically receive the add-in in their Office applications without having to do anything themselves. This is ideal for large companies where unified management is required.

The Three Alfrodin Entries in the Microsoft Marketplace

In the Microsoft Marketplace (formerly AppSource) you will find three Alfrodin entries with clearly separated roles: the SaaS offer is the license — this is where you purchase the subscription (including the 30-day free trial), and your administrator then assigns the licenses to individual users in the Microsoft 365 admin center. The two add-ins are the actual free software for your Office applications — deployed centrally via the Admin Center (Integrated apps) or installed by users themselves from the Office Store. In short: buy the license once, install the add-ins, sign in with Microsoft.

Entry	Role	Cost
Alfrodin® – Alfresco DMS for Microsoft Office (SaaS)	Purchase license, assign seats	per user/month
Alfrodin for Outlook (add-in)	Software for Outlook	free
Alfrodin for Office (add-in)	Software for Word/Excel/PowerPoint	free

Organization-wide Rollout by the M365 Administrator

The complete rollout is handled by the administrator and takes only a few minutes:

- 1. Purchase the license: open the SaaS offer in the Microsoft Marketplace, choose "Free trial", set the number of seats, complete the purchase and click "Configure SaaS account" – activation is automatic.
- 2. Assign licenses: Microsoft 365 admin center → Billing → Licenses → Alfrodin → assign a seat to each intended user.
- 3. Deploy the add-ins: Settings → Integrated apps → "Get apps" → search for "Alfrodin" → assign Alfrodin for Outlook and/or Alfrodin for Office to users,

groups, or the entire organization. Note: the same catalog also shows the SaaS entry – there, "Get it now" starts the license purchase, while for the add-ins it starts the deployment.

- 4. Recommended: be the first to sign in to the add-in with Microsoft and tick "Consent on behalf of your organization" in the consent dialog – your users will then never see a consent prompt.

Your end users do not need to install or license anything. After deployment, Alfrodin appears automatically in their Office applications (this can take up to 24 hours). On first launch, only two one-time steps remain for the user: sign in with their Microsoft account when prompted, and connect to your organization's Alfresco server (provide the server URL and Alfresco credentials).

License Activation After Purchase

Both paths lead to the same installed add-in — only the purchase flow and the license-activation step differ. Every license includes a 30-day free trial; billing starts afterwards. Choose the channel that fits your setup:

Aspect	Microsoft Marketplace	Digistore24
Target audience	Organizations on M365	Individuals, small teams
Billing	Via Microsoft 365 invoice (USD)	Digistore24 in EUR incl. VAT
License binding	Per-user seat (M365 admin center)	Email address (portable key)
Activation	Assign seat + Microsoft sign-in	Manual via license key

Purchase and Activation via Microsoft Marketplace

This path is ideal for organizations that already manage Microsoft 365 centrally and want to obtain Alfrodin through their existing M365 billing.

Step by step – purchase flow:

- 1. Open the Marketplace listing: <https://marketplace.microsoft.com/en-us/product/saas/matthiasbauernbergersoftware1761664783848.alfrodin-m365?tab=Overview>
- 2. Click "Get it now" and sign in with an administrator account of your Microsoft 365 tenant.
- 3. Select the desired billing plan (monthly or annual) and confirm the organization.
- 4. Confirm the purchase. Microsoft charges the subscription centrally to your M365 invoice — entering a credit card is not required if your organization already

has an M365 billing profile.

- 5. On the confirmation page (Thank you for your order. Configure your SaaS account to complete the purchase), click the blue "Configure SaaS account" button. You are redirected automatically to the Alfrodin activation page.
- 6. In parallel, Microsoft sends a confirmation email with the subject "Configure your Alfrodin – Alfresco DMS for Microsoft Office SaaS account". It contains a link to the same activation page – useful if you missed the button on the checkout page.
- 7. The activation page confirms your license with no further input. You will see an overview showing plan, seats, and activation date.

Step by step – assign licenses (Microsoft license management):

- 1. In the Microsoft 365 Admin Center, open Billing → Licenses: <https://admin.microsoft.com/#/licenses>
- 2. Select the "Alfrodin" entry and click "Assign licenses".
- 3. Assign a license to every user who should work with Alfrodin. Only users with an assigned license are recognized as licensed by the add-in.

Step by step – deployment in the Admin Center:

- 1. Sign in to the Microsoft 365 Admin Center: <https://admin.microsoft.com>
- 2. Navigate to Settings → Integrated apps.
- 3. Click "Get apps", search for "Alfrodin" and choose "Get it now" for both Alfrodin for Outlook and Alfrodin for Office.
- 4. Assign the add-ins to individual users, groups, or the entire organization and deploy.
- 5. Within a short time, Alfrodin appears in the Office applications of the assigned users (in the menu, ribbon, or task pane).

Step by step – user activation:

- 1. The user opens an Office app (Outlook, Word, Excel, PowerPoint) and launches the Alfrodin add-in.
- 2. The user signs in with their Microsoft account (Single Sign-On). Alfrodin checks Microsoft license management and unlocks the assigned license automatically — without any manual key.

The 30-day free trial applies to every new Marketplace subscription. Billing begins automatically after day 30, unless the subscription has been cancelled beforehand.

Purchase and Activation via Digistore24

This path is ideal for individuals, small teams, or organizations who prefer EUR billing and do not want to use the Microsoft Marketplace.

Step by step – purchase flow:

- 1. Open the Alfrodin product page: <https://www.alfrodin.com/#pricing>
- 2. In the Digistore24 purchase block, click "Buy via Digistore24". You will be redirected to the Digistore24 checkout page.
- 3. Enter your billing details (name, company optional, email, country). Select monthly or annual billing.
- 4. Choose a payment method: credit card (Visa, Mastercard, Amex, Discover), PayPal, SEPA direct debit, Apple Pay, Google Pay, Amazon Pay, or Klarna.
- 5. Complete the purchase. No charges are made during the first 30 days — billing only starts after the free trial period.
- 6. You immediately receive an order confirmation email and a second email with your license key in the format ALF-XXXX-XXXX-XXXX-XXXX.

Step by step – installation and activation:

- 1. Install the Alfrodin add-in in your Office environment. Either: yourself via Office (Home → Add-ins → search for "Alfrodin" → Add; in older versions: Insert → Get Add-ins), or via your IT administrator through the Microsoft 365 Admin Center (Integrated apps).
- 2. Open an Office application with Alfrodin installed (Outlook, Word, Excel, or PowerPoint) and launch the Alfrodin task pane.
- 3. In the license dialog click "Enter License Key".
- 4. Paste the key from your email and confirm with "Activate".
- 5. The key is bound to your email address. You can use it on an unlimited number of devices and across all Office applications.

The license key is portable: 1 key = 1 email, unlimited devices, all Office apps. Billing begins automatically after the 30-day free trial.

Overview of Activation Steps

Step	Marketplace	Digistore24
1. Purchase	M365 Admin Center / Marketplace	alfrodin.com → Digistore24 checkout
2. Billing	via M365 invoice, 30 days free	via Digistore24 (EUR+VAT), 30 days free
3. License delivery	Assign seats in Admin Center	Email with key

Step	Marketplace	Digistore24
4. Add-in installation	Admin Center Deploy or Store search	Admin Center Deploy or Store search
5. Activation	Microsoft sign-in (SSO)	Enter key

Connection types: direct connection (recommended) and Alfrodin proxy

Alfrodin knows two ways to reach your Alfresco server. With the direct connection, the add-in communicates immediately with your Alfresco server: documents, search queries, and your Alfresco credentials flow exclusively between your Microsoft Office and your server. The Alfrodin infrastructure is not involved in this communication and cannot see your content at any time. The direct connection is also faster and independent of the availability of the Alfrodin servers.

If the direct connection is not available, Alfrodin automatically uses the Alfrodin proxy as a fallback: your requests then travel transport-encrypted via the Alfrodin server, which forwards them to your Alfresco server. Content is not stored in the process – technically, however, all of your document traffic in this mode passes through a server outside your infrastructure. We therefore strongly recommend enabling the direct connection and avoiding proxy operation; the fallback is intended for environments where the CORS approval is not (yet) possible.

The choice is made automatically: when connecting, Alfrodin checks once per session whether your Alfresco server allows the direct connection. This requires a one-time CORS approval by your administrator. Add the following lines to the file `alfresco-global.properties` (each property on a single line; `cors.allowed.headers` is wrapped here for space reasons only) and then restart Alfresco:

```
cors.enabled=true
cors.allowed.origins=https://app.alfrodin.com
cors.allowed.methods=DELETE,GET,HEAD,OPTIONS,POST,PUT
cors.allowed.headers=Accept,Access-Control-Request-Headers,Access-Control-Request-Method,
    Authorization,Cache-Control,Content-Type,Origin,X-CSRF-Token,X-Requested-With
cors.exposed.headers=Access-Control-Allow-Origin,Access-Control-Allow-Credentials,Content-Disposition
cors.support.credentials=true
```

Important: allow exactly the origin `https://app.alfrodin.com` and never a wildcard (*). The approval grants no access whatsoever to your server – it merely allows the Alfrodin add-in of an already signed-in user to take the direct route; every request still requires that user's Alfresco login. You can see which connection type is active at any time in Settings under "System" > "Connection" > "Connection type".

4. Login and Authentication

Alfrodin supports multiple authentication methods to accommodate different enterprise environments and security requirements. Login occurs through a user-friendly interface with multiple tabs. Depending on how your organization has configured Alfresco, you can use one or more of the following authentication methods.

Password-Based Authentication

For password-based sign-in, enter your Alfresco server URL, your username, and your password, and click "Connect". Your password is used solely to sign in to your Alfresco server and is never transmitted to Alfrodin.

With the optional "Remember credentials" setting, Alfrodin stores your credentials encrypted on your local machine so that you are signed in automatically the next time you start; without this option, the data is kept only for the current session. Alternatively, you can sign in via an identity provider (OIDC) - see the following section.

Identity Provider (OIDC)

For organizations using Single Sign-On, Alfrodin supports OpenID Connect (OIDC). Enter your Identity Provider URL, the realm or tenant, Client ID, and Alfresco server URL. The realm or tenant is optional and only used by providers that have such a segment (for example the realm in Keycloak or the tenant ID in Microsoft Entra ID); providers such as Auth0 or Google use no such segment - simply leave the field empty in that case. When you click Sign In, your browser opens to your identity provider's login page. Alfrodin uses the Authorization Code Flow with PKCE (Proof Key for Code Exchange) for maximum security. The system is compatible with any OIDC-compliant provider (e.g. Keycloak, Microsoft Entra ID, Auth0, Okta). Check Remember Connection to automatically log in on your next visit.

This method is ideal for enterprises with centralized identity management. Users log in with their corporate credentials without having to manage separate passwords.

Recommendation for administrators: Configure your identity provider according to security best practices for production use. Using Keycloak as an example, we recommend the following settings (similar settings are available with other providers):

- Enable refresh token rotation ("Revoke Refresh Token") with reuse detection - if an already-used token is redeemed again, Keycloak revokes the entire token family.
- A short idle session timeout ("Client/SSO Session Idle"), e.g. 30 minutes, as a hard cap on token validity.
- A finite maximum session lifetime ("SSO Session Max") so that a token cannot remain valid indefinitely.

Single Sign-On and Licensing

For comprehensive SSO integration, Alfrodin also supports Microsoft Entra ID via Nested App Authentication (NAA) to enable license detection. Every purchased Alfrodin license includes a 30-day free trial – no billing occurs during those 30 days. No separate trial sign-up is required; the trial is part of the purchased license. After the 30 days, the subscription continues automatically at the selected plan price. Two licensing options are available: purchase a license through Microsoft Marketplace, whose per-user licenses your administrator assigns in the Microsoft 365 admin center, or purchase through Digistore24 and activate a license key in the format ALF-XXXX-XXXX-XXXX-XXXX. A license key is tied to one email address and can be used on unlimited devices and Office applications.

5. Working with Alfrodin – Overview

Alfrodin integrates seamlessly into your familiar Office environment. In Outlook, you access the add-in via the Alfrodin button in the message view ribbon, as well as through a dedicated task pane. In Word, Excel, and PowerPoint, the Alfrodin button appears on the Home ribbon or under "My Add-ins". The task pane opens on the right side of the Office window and remains available throughout the entire Office session, so you can switch between your document and your Alfresco content at any time.

After a successful login, you arrive at the Sites overview, the central entry point into Alfrodin. From there, you navigate into folders and files, use favorites for quick access, or start a search. Additional functions such as version management, comments, tags, workflows, and check-out/check-in are available contextually via the action bar as soon as you select a document. The user interface consistently follows the conventions of Microsoft Office, so new features can be discovered without any additional training.

The following chapters describe all available functions in a systematic order. First, sites and navigation are explained, followed by file operations and document management. Finally, advanced topics follow, including version management, comments, tags, search, the Outlook integration, and settings.

You can explore the features in any order. As a starting point, we recommend beginning with Sites (Chapter 6) and working your way into file management from there. All changes you make through Alfrodin are saved directly on the Alfresco server; there is no local cache state that would need to be synchronized manually.

6. Sites

Sites are central collection points for content, collaboration, and teamwork in Alfresco. Alfrodin makes it easy to explore, manage, and track site activities. A site in Alfresco is like a virtual workspace for a team or project where documents can be stored and edited together.

All Sites

The Sites view is your entry point into Alfrodin. Here you will find the complete list of all available sites with your respective roles (Manager, Member, Contributor, or Consumer), visibility level (public, private, or moderated), and a search bar for quick filtering. Each site card displays important information so you can quickly understand which site is relevant to you.

Favorites

Mark sites as favorites to quickly access the most important sites. A star symbol on each site card allows you to mark a site as a favorite or remove the marking. The Favorites view shows only the sites you have marked as favorites – a convenient way to quickly access important sites.

Activities

The Activities view displays a chronological feed of all activities in your sites, grouped by time (Today, Yesterday, This Week, Earlier). Each activity shows the user (with profile photo or initials avatar), the activity (file added, file edited, folder created, etc.), and the affected file or folder. A free-text search and three filters help you find things fast: by actor (mine / others / everyone), by type (content, comments, memberships) and by date range (last 7, 14 or 28 days). When a filter is active, Alfrodin automatically loads the activities it needs, so the filters cover the full range rather than only the first loaded page.

7. Folders and Files

File and folder management is the heart of Alfrodin. The system offers intuitive navigation, flexible sorting, and powerful actions for managing your content. Whether you are managing individual files or entire folder structures, Alfrodin provides tools for all tasks.

Navigation and Structure

Navigate through folder structures with breadcrumbs showing your current location. Folders always appear at the top of the list, followed by files. This makes navigation

logical and predictable. Clicking on a breadcrumb link takes you immediately back to that folder. The structure is always clear and organized so you don't lose track of files.

Sorting and Filtering

Sort files and folders by name (A-Z or Z-A), modification date, creation date, or file size. Folders remain at the top regardless of sort order. Your sorting preference is saved and retained on your next visit. The same sorting applies in the Favorites view as well. This persistence is convenient when you prefer a specific sort order.

File and Folder Operations

Create new folders with a single click, upload files via drag-and-drop or multi-select. Delete files and folders to the recycle bin (soft delete), restore them, or permanently delete them. Copy or move files and folders with a folder browser where you select the destination and can create new folders as needed. Multi-select enables batch operations – mark multiple files and perform actions on all of them simultaneously. Download folders and multi-select files as ZIP archives and see a progress indicator.

Drag & Drop

Whenever an Alfrodin folder is open in the task pane, it accepts drag-and-drop from several sources. The file list of the current folder serves as the drop target and is visually highlighted during drag-over. Once you release, the files or emails are uploaded immediately, with a progress indicator keeping you informed in real time.

Use case "Files from the file system": You can drag one or multiple files from Finder (macOS), Windows Explorer, or any other OS file manager directly into the open Alfrodin folder. All common file types are accepted. The upload starts immediately after the drop, and progress is shown in the upload indicator.

Use case "Folders with nested structure from the file system": You can also drag whole folders including nested subfolders from Finder or Windows Explorer into Alfrodin. Alfrodin reads the folder structure recursively and recreates the same hierarchy in Alfresco - subfolders are created and all contained files are uploaded to their correct locations. During the scan phase, the progress indicator shows "Reading folder structure..."; afterwards the actual upload runs file-by-file. If a subfolder of the same name already exists in Alfresco, files are placed into that existing folder.

Use case "Emails from Outlook": From Outlook (Outlook on the Web, Outlook for macOS, and Outlook for Windows) you can drag one or multiple selected emails directly into an Alfrodin folder. Each email is archived as a standalone .eml file, with a sensible filename derived from subject and date. Ideal for quickly archiving project correspondence without leaving the Outlook window.

Supported drag sources at a glance:

Source	Result in Alfrodin
Finder (macOS) / Explorer (Windows) - files	Files uploaded to the current folder
Finder / Explorer - folders with subfolders	Complete folder tree recreated in Alfresco
Outlook Web / Outlook Mac/Windows (one email)	Email archived as .eml file
Outlook (multiple selected emails)	All selected emails archived individually as .eml

Note: Drag & Drop only works once you have navigated into a folder. No drop target is available on the Sites overview – pick a site and a destination folder first.

Outlook folder limitation: Dragging an entire Outlook folder (for example "Inbox" or a subfolder from the Outlook Explorer) is not technically supported, because Outlook does not expose the folder contents as a file list to other applications. If you want to archive a group of emails, please select all emails inside the Outlook folder (e.g. via Ctrl+A or Cmd+A) and drag that selection into Alfrodin together - each email is then archived individually as an .eml file.

8. Document Management

The document edit view provides comprehensive access to all document functions. The action bar in the detail view includes many powerful options for managing your content. When you select a document, you see all available actions at a glance. In the list views (Sites, folders, search, favorites and checked-out files), each row's actions are grouped in a unified three-dots menu (:); in a document's detail view, the same actions are available as the action bar. The three-dots menu first shows the most important actions (Download, Rename, Move, Copy, Favorite) along with the "More..." entry; clicking "More..." expands the remaining actions directly within the same menu: send as link, as a public link or as an attachment, Upload new version, Like, Manage permissions, Info, and – as the last entry – Delete.

Action Bar

Mark a document as a favorite for quick access. Preview document content. Rename documents (the filename without extension is automatically selected). Download documents or download ZIP archives of folders. Create a shareable link to a document with optional expiration time. Open Office documents in Word, Excel, or PowerPoint. Copy or move files. Open the parent folder (this function is only available from search, favorites, or the checked-out files list). Upload a new version, check the document in or out, start a workflow, and edit properties (title and description). Delete documents.

Properties and Preview

The Properties tab shows filename, file type, size, creation and modification dates, a list of editors, and applied tags. The preview function supports many file types: images (JPG, PNG, GIF, SVG, WebP), PDF files, text files (JSON, XML, JavaScript, plain text), and Office documents. You can navigate to the next or previous file in the folder using arrow keys or navigation buttons.

Ratings (Like)

You can like documents and folders – compatible with the ratings in Alfresco Share. In the three-dots menu, the "Like" entry also shows the number of ratings; clicking it toggles your own rating. In the Info dialog, the rating appears as the first property with a thumb icon and counter, and can also be set or removed there with a click.

9. Version Management

Alfrodin automatically tracks all versions of a document. This allows you to see the change history, compare earlier versions, and revert to older versions if needed. Version management is an important feature for collaboration and document tracking.

Version History

Open the Version History tab of a document to see a complete list of all versions. Each row shows the version number, file size, date, and editor. The current version is marked with a badge. Download earlier versions or restore them to make them the current version. This is ideal when you have accidentally deleted or overwritten important content.

Upload New Versions

When you update a document, you can choose whether it is a major version (e.g., from 1.0 to 2.0) or a minor version (e.g., from 1.0 to 1.1). Add a comment to explain what changes you have made. If the filename does not match the original, Alfrodin warns you and asks whether you want to rename the file or keep the original name. The new version immediately appears in the version history.

10. Check-Out and Check-In

The check-out/check-in functionality ensures that multiple users cannot edit the same file simultaneously. When a file is checked out, only the user who checked it out can upload a new version. This prevents conflicts and data loss.

Check-Out

When you check out a file, it is locked for your exclusive editing. Other users can view the file but cannot edit or move it. The file remains checked out until you check it in or cancel the check-out. A lock icon appears in the navigation bar. Other users can see who has checked out the file and when.

Check-In

When you are finished with your changes, check the file back in. Specify whether it is a major or minor version, add a comment, and optionally upload the updated file. The new version immediately appears in the version history and the lock is released. Alternatively, you can cancel the check-out to release the lock without a new version.

Checked-Out Files Overview

Open the Checked-Out Files view (accessible from the navigation) to see a searchable list of all files checked out by you or other users. Each row shows the lock status. You can check files in, cancel check-out, download, or view details.

11. Comments

Comments enable team collaboration and discussion on specific documents. You can add, edit, and delete comments on any document. Comments are a great way to provide feedback and communicate with colleagues without leaving the file.

Comment Management

Open the Comments tab of a document. The tab displays a count of comments. To add a comment, type your text and press Ctrl+Enter (or click the Send button). Comments appear chronologically with the newest first. You can edit or delete your own comments. If a comment has been edited, an "edited" indicator appears. A Load more button reveals older comments.

12. Tags and Search

Tags are keywords that help you organize and categorize your documents. You can add tags to a document's properties and filter by tags in the search. Tags are a flexible categorization system that helps you find documents faster.

Tag Management

Open the Properties tab of a document and look for the Tags field. Enter your tags – the system offers autocomplete for existing tags in the repository. You can add multiple tags by separating them with commas. To remove a tag, click the X next to the tag name. Tags must consist of letters, numbers, and hyphens.

Tag Cloud and Filtering

In the search view, you will see a tag cloud with frequently used tags. Click a tag to filter all documents with that tag. You can select multiple tags simultaneously (AND logic) – the system shows only documents that have all selected tags. Selected tags appear as chips, and you can remove individual or all tags.

13. Search and Filters

Alfrodin offers comprehensive search and filter functionality to quickly find the documents you need. With full-text search and advanced filters, you can find the right document quickly even in large repositories.

Full-Text Search

Enter a search term to perform a full-text search across all content in the Alfresco repository. Results display the full path to each file. You can browse search results and click a file to open it. When you click a parent folder, that folder opens and breadcrumbs automatically update.

Advanced Filters

Refine your search with advanced filters: File type (PDF, Word, Excel, PowerPoint, Images, Text – multi-select available), Date (Today, Last Week, Last Month, Last 3 Months, Last Year), Size (under 1 MB, 1-10 MB, 10-100 MB, over 100 MB), Element type (files only, folders only, both). Filter chips are displayed and can be combined. You can also combine tag filters with other filters. This allows you to perform very precise searches.

14. Outlook Integration

The Alfrodin Outlook add-in integrates email management and document archiving directly into Outlook. You can archive emails and attachments without leaving Outlook. This is particularly useful when you need to store emails as documentation.

Email Archiving

When you select an email in Outlook, the Alfrodin panel displays the email subject. Select any Alfresco folder where you want to archive the email and click Archive. The email is saved as a file in the selected folder. This is ideal for compliance and document management. Alternatively, you can drag selected emails directly from Outlook into an open Alfrodin folder – see the Drag & Drop section in Chapter 7.

Attachment Management

Extract attachments individually or all at once and upload them to an Alfresco folder. You can also select multiple emails and upload all attachments together. This saves time when you need to archive many files.

Send documents by email

Conversely, you can insert a document straight into a new Outlook email from within Alfrodin. From a file's three-dots menu (⋮), choose one of three send options: “Send as link” inserts an internal Alfresco link that lets authorized recipients open the document directly in Alfresco. “Send as public link” creates a shareable link with an optional expiry date – ideal for external recipients without Alfresco access. “Send as attachment” attaches the file directly to the email. Outlook then opens a new message window with the link or attachment already inserted, which you address and send as usual. This lets you get documents to colleagues or partners quickly without leaving Alfrodin.

If you are already composing an email (new message, reply or forward), it is even more direct: open the Alfrodin task pane in the compose window, navigate to the document you need and choose “Attach to email” from its three-dots menu (⋮). The file is attached straight to the open email and appears in its attachment bar. The entry is shown only while composing an email and only for files. Very large files (above roughly 25 MB) may not be attachable; use “Send as link” in that case.

Panel Navigation

The Alfrodin panel is expanded by default. Click the X button to minimize the panel to show only the compact bar with the mail icon and subject. Click the compact bar to expand the panel again. The panel state (expanded or minimized) is retained when you

navigate between folders.

Smart Alerts on Send

Alfrodin can automatically remind you to file an email in Alfresco when you send it. With the feature enabled, the add-in checks your configured conditions when you click Send. If they apply, the dialog "File this email in Alfresco before sending?" appears. Choosing "File in Alfresco" opens the Alfrodin panel directly in filing mode: you select a target folder as usual, file the email, and then send it again – this time without being asked. Choosing "Send Anyway" sends the email without filing it. Sending is never blocked: you always stay in full control, and in case of technical problems the email is sent without prompting.

The feature is disabled by default and is enabled in the settings under the "Smart Alerts" section via the "Ask when sending" toggle. Optionally, you define when to ask – the conditions are OR-combined: when at least one recipient is outside your own domain, when the email has attachments, or when a recipient belongs to a domain list you define (e.g. important customers, entered comma-separated). If you select no condition, you are asked on every send. The settings are stored in your mailbox and therefore apply automatically on all your devices.

Emails that have already been filed in Alfresco are detected automatically and you are not asked again. Smart Alerts requires a recent Outlook version on Windows, macOS, or the web; Outlook Mobile is not supported. In older Outlook versions, the reminder appears without the direct action button – in that case, file the email manually via the Alfrodin panel.

15. Word, Excel, and PowerPoint

The Alfrodin Office add-in (for Word, Excel, and PowerPoint) provides seamless integration with Alfresco. You can save documents directly to Alfresco and open them. This allows you to work with Alfresco from the beginning rather than just uploading files at the end.

Save Documents

Open the Alfrodin panel in your Office application (Word, Excel, or PowerPoint). Select a destination folder in Alfresco and click Save. Your current document is saved in the selected folder. The file is saved with the standard Office extension (.docx, .xlsx, .pptx). You can immediately continue working, and the file is available in Alfresco.

Open Files

Navigate through your Alfresco folders in the Alfrodin panel, find a file you want to open with the appropriate Office application, and click Open in [Application]. The file is downloaded and opened in your desktop version of Word, Excel, or PowerPoint. This is faster than manually searching for and downloading the file.

16. Workflows and Tasks

Workflows automate recurring processes and enable teams to manage tasks and collaborate. Alfrodin provides comprehensive workflow and task management features. This is ideal for organizations that want to implement structured processes.

Task Overview

Open the Tasks view to get an overview of your assignments. My Tasks shows personal tasks assigned to you. Pool Tasks displays group tasks assigned to a group you are a member of. You can mark tasks as complete, approve, reject, claim, or release them.

Start Workflow

To start a new workflow, open the Workflows view and click New Workflow. Enter the workflow type, description, priority, due date, and assignees (individual people or groups, searchable). You can also attach documents to the workflow. When you start a workflow from a document detail view, the document is automatically attached.

Task Badge

Right on the Tasks tab, a red counter shows the number of your open tasks (assigned plus pool tasks). At a glance you see how many tasks await you without opening the view. The counter updates as soon as you complete, claim, or release a task, and disappears when there are no open tasks.

Finding Tasks: status, search, and filters

In the Tasks view you switch between Active, Completed, and All. A search box searches title and description in real time. The filter panel narrows by date range – via a preset (Last 7 days, Last 30 days, This year) or a custom From-To range. The reference date is selectable: due date for active tasks, completion date for completed ones, plus start date. You sort by completion, due, or start date (ascending or descending) and filter by priority. This makes it easy to find even completed tasks by date range and keyword – something the plain Share interface could not do. Active filters appear as removable chips, alongside a result count.

Review History: Who Approved

For review workflows, the task detail view shows the full review history: for each reviewer you see, with their full name and the date, whether they approved, rejected, or completed the task without a formal vote. Four clearly distinct states – Approved, Rejected, Completed and Pending – make the status obvious at a glance; a header line shows how many reviewers are still pending, and any comment is shown alongside. Pure workflow helper steps without a reviewer decision are hidden. This brings the same overview you know from the Alfresco Share workflow details directly into Office.

Approval report as PDF

From the review history, you can generate a clear approval report as a PDF with a single click. The "Report (PDF)" button at the top of the task detail view lets you download the report. The document carries the Alfrodin logo and gathers all key information: task title, initiator, priority, start and due dates, the document under review and its status, the description, and a summary with the approval rate. Below that, a colour-coded table lists every reviewer with their decision – Approved, Rejected, Completed or Pending –, date and comment, sorted by date in descending order. This gives you the approval status at any time as a shareable, audit-ready document.

The report is available for every task, not just reviews. For review tasks it contains the approval history; for other task types – such as a simple assigned task – Alfrodin produces a general task report with the key details. The related detail fields – assignee, status and, once the task is complete, the completion date and any completion comment – are also shown directly in the task detail view.

17. Wiki

Alfrodin brings the Alfresco Share site wiki directly into the task pane. You read, browse, and edit wiki pages without switching to the browser. The wiki is ideal for handbooks, process descriptions, onboarding material, and knowledge maintained collaboratively around a site.

Opening the Wiki and Browsing Pages

Use the tab row in the header (Files / Wiki / Tasks) to switch to the wiki view of the current site. Alfrodin shows a list of all wiki pages with title and last modification. A search field filters the pages by title, so you can quickly find the page you want even in large wikis. Use the "New Page" button to create a new wiki page.

Reading Pages and Table of Contents

When you open a page, the content is displayed fully formatted – with headings, bullet lists, tables, and images. From the page's headings, Alfrodin automatically generates a table of contents in the margin; the section currently in view is highlighted within it, so you can stay oriented even on long pages. Internal links in the Share syntax `[[Page name]]` are rendered as clickable links and open the target page directly in the reader.

Full-Screen Reader

For focused reading, open a page in the full-screen reader. There the content uses the full width, while the table of contents remains visible to the side. At the top of the reader, you find a breadcrumb path (site and page name), the "Edit" and "Versions" buttons, and a meta line stating who last modified the page, the date, and the current version number.

Versions and History

Via "Versions", you see the complete change history of a wiki page. Each entry shows the version number, the date, and the author with full first and last name. You can view an earlier version read-only and restore it if needed – the restored version then becomes the new current version, without losing the intermediate versions.

The Wiki Editor

Via "Edit", you open the WYSIWYG editor, which likewise uses the full width. The toolbar offers font family, bold, italic, underline, and strikethrough, headings, text and highlight colors, alignment, as well as bulleted and numbered lists. You insert links and wiki page links (`[[...]]`), create and edit tables, and upload images: a selected image file is automatically uploaded to Alfresco and inserted at the cursor position. For full control, an HTML source view with syntax highlighting is additionally available. When saving, you choose – as with documents – whether a new version is created.

Searching within a Page

Both the full-screen reader and the wiki editor let you search the page content directly: press `Cmd+F` or `Ctrl+F`, or use the search field, to enter a term – Alfrodin highlights every match and steps through them with next and previous. This makes it easy to find the right spot even on long pages.

Printing a Page

A wiki page can be printed directly. On the desktop, Alfrodin opens the page cleanly formatted in your default browser and triggers the print dialog there, so you can produce a paper printout or a PDF.

Comments on Wiki Pages

You can add comments to any wiki page – both in the task pane and in the full-screen reader below the article. Each comment shows a colored initials avatar, the author's name and the date, so a page can be discussed right inside Office without switching to the browser.

Tags

Wiki pages can be tagged. Tags are entered in the editor in a dedicated bar at the bottom; the assigned tags are then shown in the page view and in the full-screen reader. In the page list, click a tag to quickly filter all pages that share it.

18. Blog

In addition to the wiki, Alfrodin also brings the blog of an Alfresco site directly into the task pane. You read, comment on, write, and publish blog posts without switching to the browser. The blog is ideal for announcements, project updates, release notes, and anything that should be recorded chronologically and discussed together.

Opening the Blog, Feed and Filters

Using the tab row in the header, you switch to the blog view of the current site. Alfrodin shows the post feed with title, author, date, and comment count. A filter splits the feed into "All", "Published", "Drafts", and "Mine"; an additional tag filter narrows the display to a specific keyword. Use the "New post" button to start a new article.

Reading a Post and Comments

When you open a post, the content is displayed fully formatted - with headings, lists, tables, and images. Below the article you find the comment thread: existing comments are shown with author and timestamp, and you can add your own comment via the input field. This creates a traceable discussion for every post - right inside Office.

Full-Screen Reader

For focused reading, open a post in the full-screen reader. The feed with the remaining posts stays visible on the left, while the article appears at full width with its comments on the right. The header shows a breadcrumb path, the "Edit" and "Versions" buttons, and a meta line with author, date, and estimated reading time.

Drafts and Publishing

A new post can first be saved as a draft - visible only to you - and published later. Use the "Publish" button to make a draft visible to all site members. Drafts are marked separately in the feed, and the "Drafts" filter shows exactly those posts that have not yet been published.

Blog Editor

Via "Edit" or "New post" you open the WYSIWYG editor, which uses the full width. The toolbar offers bold, italic, underline, and strikethrough, headings, text and highlight colors, alignment, and bulleted and numbered lists. You insert links and work with tables - including merged cells, border styles, and column and row sizes that can be dragged with the mouse. You insert images in two ways: by uploading a file or by selecting an image already stored in Alfresco via a dedicated picker dialog; inserted images can be resized with handles. You assign tags in a dedicated bar at the bottom. The wiki editor additionally offers a font family selection. For full control, there is also an HTML source view with syntax highlighting.

Versions and History

Like wiki pages, blog posts are versioned. Via "Versions" you see the full change history with version number, date, and author. You can view an earlier version read-only and restore it if needed - without losing the versions in between.

19. My Files and Shared Files

Besides the site-related folders, Alfrodin offers direct, site-independent access to your personal files. This lets you reach your most important storage areas with a single click, without having to select a site first. Both areas are reachable from the menu in the header.

My Files

"My Files" opens your personal storage area in Alfresco (your home directory), independent of any particular site. Navigation, upload, drag & drop, and all file actions work exactly as in the site folders. This area is suited for documents that concern only you or that you have not yet assigned to a site.

Shared Files

"Shared Files" shows the shared storage area (the Shared directory) that all users of your Alfresco installation can access. This area is ideal for files that should be available organization-wide without being assigned to a particular site - such as templates,

forms, or general reference documents.

20. Manage Permissions

With "Manage Permissions", you assign access rights for individual folders and files directly from Alfrodin – without the detour through Alfresco administration. This lets you control precisely who may view or edit an item.

Viewing and Assigning Permissions

From the three-dots menu (:) of a folder or file, you open "Manage Permissions". The dialog shows the inherited and the locally set permissions separately. Via "Add user/group", you search for a user or a group and assign them a role. The available roles are the standard Alfresco roles Consumer, Contributor, Editor, Collaborator, and Coordinator. You can remove existing entries again at any time.

Inheritance and Lockout Protection

By default, an item inherits the permissions of its parent folder. Via the "Inherit permissions" toggle, you can disable this inheritance and let only the locally set rights apply. So that you do not accidentally lock yourself out in the process, Alfrodin explicitly warns you when you disable inheritance without having granted yourself an access right. Save the changes only once the intended people and groups have the appropriate roles.

21. Settings

Settings allow you to personalize Alfrodin, manage your profile data, and configure the application. Each user can customize their own settings to use Alfrodin optimally for their requirements. The settings page is organized into two tabs: "User" contains Profile, Appearance, Language, Smart Alerts, and License; "System" contains Connection, Alfresco Server, Diagnostics, and the app information.

User Profile

Upload a profile photo and manage your personal information: name, email, position, and location. You can also enter company information: organization name, address, and phone number. If your user account is managed by LDAP, these fields are read-only.

Appearance and Language

Choose your preferred design theme: Light, Dark, or System Default (follows system settings). Select your preferred language: German, English, French, or Spanish. The user interface updates immediately in the selected language.

The selected appearance – light, dark or "match system" – also applies to the full-screen dialogs, i.e. the wiki and blog reader and their editors, so they blend seamlessly into a dark Office.

Smart Alerts (Outlook only)

In Outlook, the settings page additionally contains the "Smart Alerts" section. Here you enable the filing reminder on send via the "Ask when sending" toggle and optionally define under which conditions you are asked: recipients outside your own domain, emails with attachments, or recipients from a comma-separated domain list. The settings are stored in your mailbox and apply on all your devices. For a detailed description of the feature, see Chapter 14, section "Smart Alerts on Send".

License and Connection

The License section shows your license status, license type (Microsoft Marketplace or direct purchase), your license plan, license key, and registered email address. You can also release a license key if you no longer need it. The Connection section displays your Alfresco server URL, username, and the active connection type (direct connection or Alfrocin proxy, see Chapter 3); here you can also delete your locally saved credentials. The Alfresco Server section shows the version and edition of the connected Alfresco server.

Diagnostics

For technical support, you can export or delete logs. Change the log level (Debug, Info, Warning, Error). This is helpful when troubleshooting Alfrocin issues. Debug logs are very detailed and can assist with error resolution. The log export is also available directly on the license notice screen ("Export logs" below "Clear cache & re-check license") – so you can provide diagnostic data to support even while Alfrocin is still locked because no license has been assigned yet.

App Information

View the Alfrocin version number, publisher (Matthias Bauernberger Software), website, and support email address.

22. Pricing and Licensing

Alfrodin offers flexible licensing options suitable for organizations of all sizes. Whether you are an individual user or a large enterprise, there is a suitable licensing option.

Free Trial Period (30 Days)

Every Alfrodin license purchased through Microsoft Marketplace or Digistore24 includes a 30-day free trial starting on the date of purchase. During those 30 days, all features are available without restriction; no billing occurs and your payment method is not charged. No separate trial sign-up is required — the trial is automatically part of every purchased license. After the 30 days, the subscription continues automatically at the selected plan price. You can cancel any time during or after the trial through the respective payment provider (Microsoft Marketplace or Digistore24). This policy applies uniformly to both purchase channels.

One Product for All Office Applications

Alfrodin is a single product that covers Outlook, Word, Excel, and PowerPoint. You do not need separate licenses for each application – one license works for all. This greatly simplifies license management.

License Management

A license key is tied to one email address and can be used on unlimited devices and in all Office applications. This provides maximum flexibility for users who use multiple devices or switch between different Office versions.

Current Prices and Options

Current prices and licensing options are available at www.alfrodin.com. We offer various plans suitable for both individual users and large enterprises. Pricing is transparent and there are no hidden fees.

Cancelling Your Subscription

How you cancel your Alfrodin subscription depends on the purchase channel you used. Both channels allow cancellation at any time; annual plans typically run until the end of the committed one-year term. The 14-day statutory right of withdrawal applies independently and is described in the following section.

Microsoft Marketplace

If you purchased Alfrodin through the Microsoft Marketplace, cancellation is handled through the Microsoft 365 Admin Center. Only accounts with administrator rights can manage subscriptions.

- Sign in with an administrator account to the Microsoft 365 Admin Center at <https://admin.microsoft.com>
- In the left-hand menu, open Billing → Your products.
- Locate the subscription “Alfrodin – Alfresco DMS for Microsoft Office” in the list.
- Click the subscription and, in the detail panel, select “Cancel subscription”.
- Confirm the cancellation. Microsoft shows a confirmation dialog noting the 90-day administrator data-access period and a prorated refund on the last invoice.
- The subscription moves to status “Cancelled”. The add-in remains usable until the end of the current billing period (monthly or annual, depending on the plan).

Our backend automatically receives the cancellation through a webhook. The add-in's license check detects the end of the license typically within a few minutes; at the latest at the next Outlook start or after the 15-minute license cache expires, the user will see the license gate.

Digistore24

If you purchased Alfrodin directly through Digistore24, cancellation is handled through the Digistore24 customer portal.

- Open the Digistore24 customer portal: https://www.digistore24.com/order_manager
- Sign in with the email address you used when purchasing. Digistore24 uses email-based login with an automatically emailed code (there is no classic password).
- Alternatively, click the “Manage order” link in one of the Digistore24 emails (for example, the purchase confirmation).
- Navigate to the “Subscriptions” tab.
- Find the Alfrodin subscription and click “Cancel subscription”.
- Confirm the cancellation. You will receive a cancellation confirmation by email.
- The cancellation takes effect at the end of the current billing period (for example, end of month or end of year, depending on the plan).

Digistore24 automatically sends an IPN webhook event to our backend. Your license key remains active until the end of the period you already paid for and is deactivated only afterwards.

Right of Withdrawal

Regardless of the purchase channel, EU customers have a 14-day statutory right of withdrawal after purchase. To exercise the right within this period, please contact office@mbasoft.at; the refund will be issued through the original payment method. For more information, see the Terms and Conditions at www.alfrodin.com.