

# ShareFast Client User Manual

Stable Release1.1

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## Content

1. Installation and Configuration .....	4
1.1 Getting Started .....	4
1.2 Microsoft .NET Framework 2.0 Installation.....	4
1.3 ShareFast Client Installation .....	5
1.4 ShareFast Client Initial Configuration .....	6
2. Software User Interface and Functionality .....	7
2.1 Software User Interface .....	7
2.2 Software Functionality.....	8
2.2.1 Server Configuration.....	9
2.2.2 Operating with Hierarchies and Workflows .....	9
2.2.3 Adding Documents to Workflows .....	10
2.2.4 Workflow/Task Discussion.....	10
2.2.5 Searching Uploaded Documents.....	10
2.2.6 Workflow Process Instance Management.....	11
2.2.7 Managing Users .....	12
3. FAQ.....	13

# 1. Installation and Configuration

This section describes how to install the ShareFast Client software and configure it for your system environment.

## 1.1 Getting Started

First, go to <http://stable11.sharefast.org/> to start installation. If you are prompted to install Microsoft .NET Framework 2.0, please see the section Microsoft .NET Framework 2.0 Installation in this manual. If not, please continue to install ShareFast Client software (see the section ShareFast Client Installation)

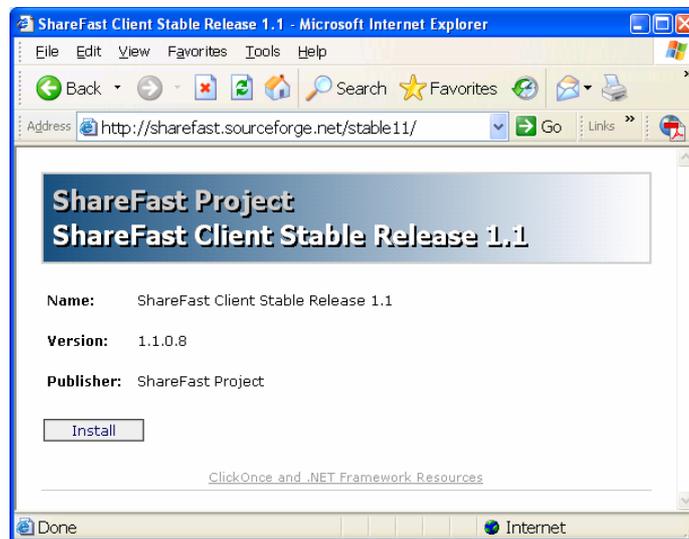


Figure 1-1 <http://stable11.sharefast.org>

The following prerequisites are required:

- .NET Framework 2.0

If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.

Figure 1-2 Prompt message for Microsoft .NET Framework 2.0 installation

## 1.2 Microsoft .NET Framework 2.0 Installation

If you are prompted to install Microsoft .NET Framework 2.0, click on the 'INSTALL' link to download and start installation. Click 'Accept' at the license dialogue, and start installation. After finishing, close the browser and perform the steps in the section ShareFast Client Installation.

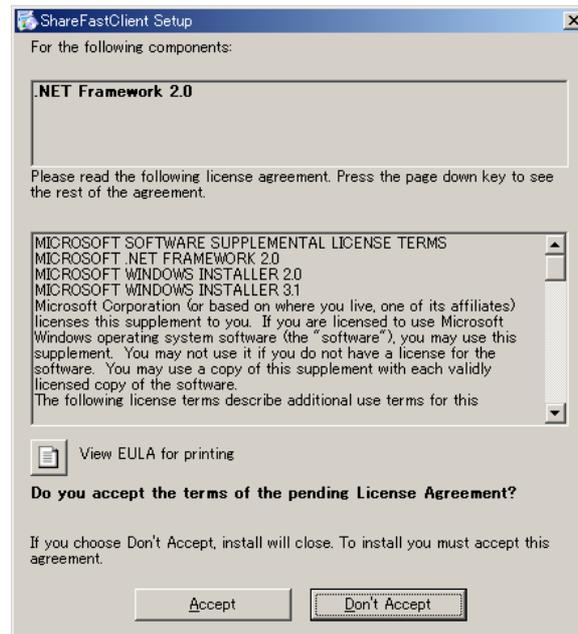


Figure 1-3 License dialogue

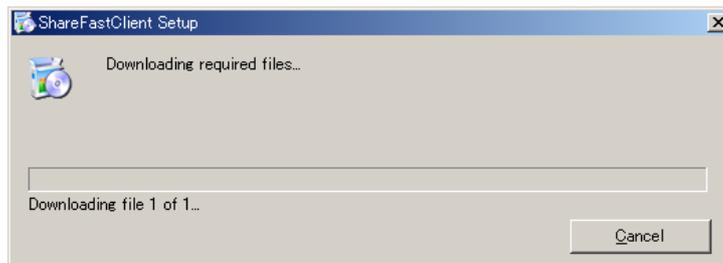


Figure 1-4 Installation screen

## 1.3 ShareFast Client Installation

Go to <http://stable11.sharefast.org> and click the 'Install' button to start the installation. If you are prompted by the dialogue in figure 1-5, you can also click the 'Install' button to start the installation. Installation will be automatically processing. After finishing, the software will be launched, and you will see its login dialogue.



Figure 1-5 Starting installation dialogue



Figure 1-6 Installing ShareFast Client dialogue



Figure 1-7 Login dialogue

## 1.4 ShareFast Client Initial Configuration

It is necessary to configure server name for this client. Therefore, for the first time use, input your AccountName, Username, Organization, Password and Host detail into the Login dialog box (figure 1-8). Then, the software main window (figure 1-9) will be shown. You can also re-configure user account and host detail by performing the [Server Configuration](#) function.

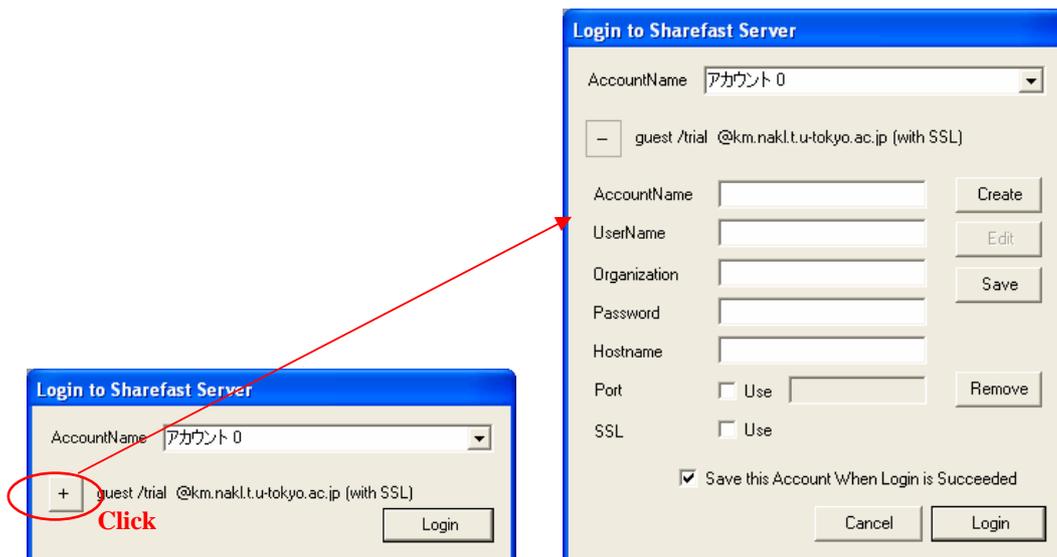


Figure 1-8 Login dialogue box

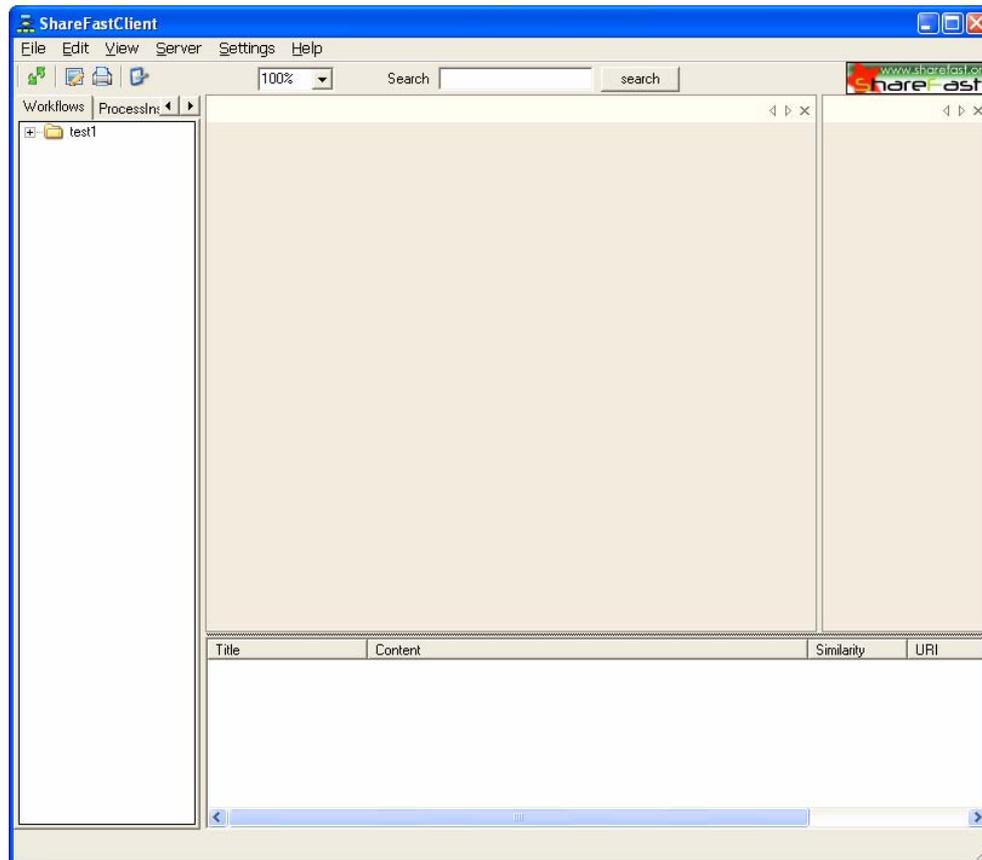


Figure 1-9 Software main windows

You need to obtain your Username and Organization from system administrator first. For the default server setting, Username and Organization are `org_admin` and `sharefast_guest`, respectively, while the password is 'password'.

#### Default account

AccountName: <As you like>

UserName: `org_admin`

Organization: `sharefast_guest`

Password: `password`

Hostname: Server name or IP address

Port: Tomcat server port number (default is 8080)

SSL: Check this box if using SSL (default is SSL is not being used)

## 2. Software User Interface and Functionality

This section describes all functions of ShareFast Client software.

### 2.1 Software User Interface

The software user interface is comprised of menu bar, tool bar, tree view and main view as shown in figure 2-1.

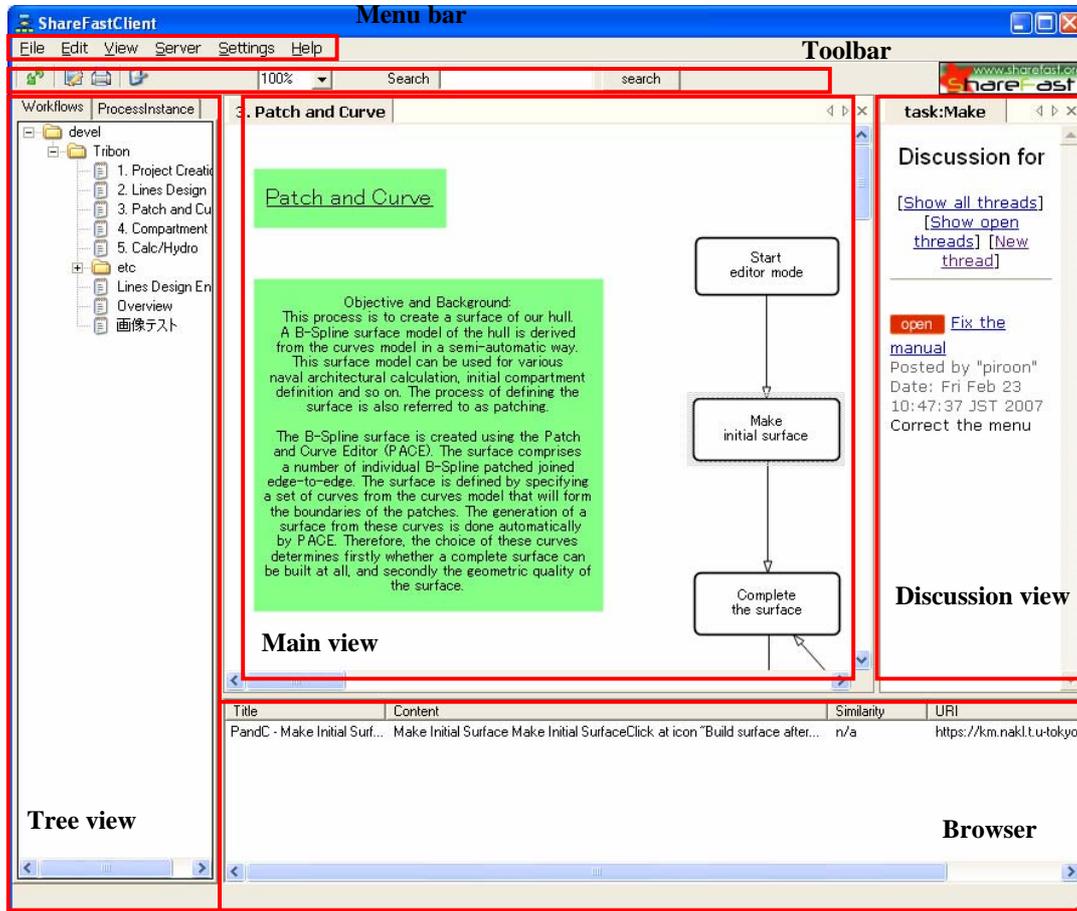


Figure 2-1 Software interface

- 1) Menu Bar: Contains all functional commands for this application. The detailed information of each function will be described in the next section.
- 2) Toolbar: Contains view size box, and search box.
- 3) Tree View: Shows all the hierarchies (folders) and workflows/process instances kept in the server.
- 4) Main View: The display area of workflow.
- 5) Discussion View: Shows discussion for each workflow/task.
- 6) Browser: Shows uploaded files related to tasks.

## 2.2 Software Functionality

ShareFast is a software application for document and knowledge management. By using workflow, with document files added, to represent work process, users can understand what should be done for each task easily.

This section explains the range of functions that ShareFast Client can perform.

## 2.2.1 Server Configuration

1) On the menu bar, click ‘Server’ → ‘Reconnect’.

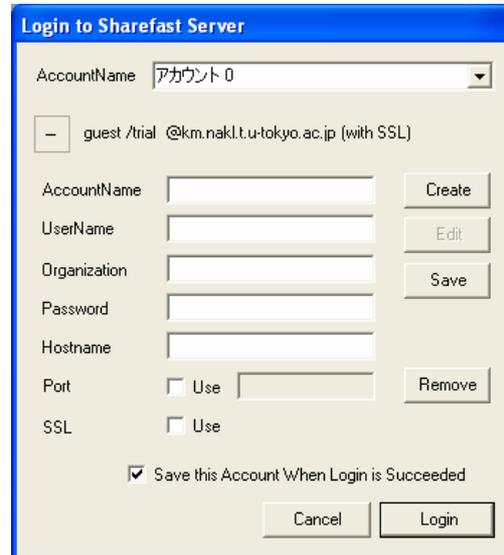


Figure 2-2 Reconnect

2) Input user account and host details the figure 2-2 box. Click OK button to finish.

## 2.2.2 Operating with Hierarchies and Workflows

### 2.2.2.1 Creating and Editing New Hierarchies

Hierarchies are folders that contain workflow files or sub-hierarchies. You can create, rename or delete by using right click at the tree view and choose the relevant command.

### 2.2.2.2 Creating and Editing New Workflows

Right click the hierarchy that you want to make a new workflow, and click ‘New Workflow’. After that, the application will lead you to the workflow edit mode on the main view.

On the top of the main view in workflow edit mode, you will see the tool bar as shown in figure 2-3.



Figure 2-3 Edit mode toolbar

You can double click on the Normal Node, Mail Node and Comment Box to edit their name and other contents. To customize font and color of the node, click ‘Format’ → ‘Font’, or ‘Format’ → ‘Color’ from the menu bar.

### 2.2.2.3 Saving Workflows

- 1) Save to server: In the workflow edit mode, click ‘Save Workflow in Server’ icon. The workflow will be saved to your server, and appear on the tree view under the hierarchy it belongs to. You may be required to input the workflow name in case it is new workflow.
- 2) Save to local: In the workflow edit mode, click ‘Save to Local’ icon. After input the file name and click Save button, the workflow will be saved to your local PC, and not appear on the tree view. You can later open the workflow file on your local PC by choosing ‘File’ → ‘Open’.

### 2.2.2.4 Editing Existing Workflows

Click the workflow on the tree view that you want to edit, then right-click and choose ‘Edit Workflow’.

## 2.2.3 Adding Documents to Workflows

First, click the workflow from tree view that you want to add documents to. The chosen workflow will be displayed on the main view. Next, drag the desired document from other windows, and drop it into the node of the workflow. The document will be automatically uploaded to the server.

You can view the uploaded documents by clicking at the node that you have already added some documents. After clicking, the document details will be shown at the Browser view.

### 2.2.4 Workflow/Task Discussion

Users can add discussion related to each workflow/task. Discussion view is on the right hand side of the application screen.

### 2.2.5 Searching Uploaded Documents

The software provides search function to look for the uploaded documents. From the tool bar, input the keyword to the search box (figure 2-4), and click ‘Search’ button. The software will show all documents related to the keyword at the browser view. You can also open/download/search similar documents/delete the listed documents by right-clicking on the file name on the browser view and choose the relevant menu.

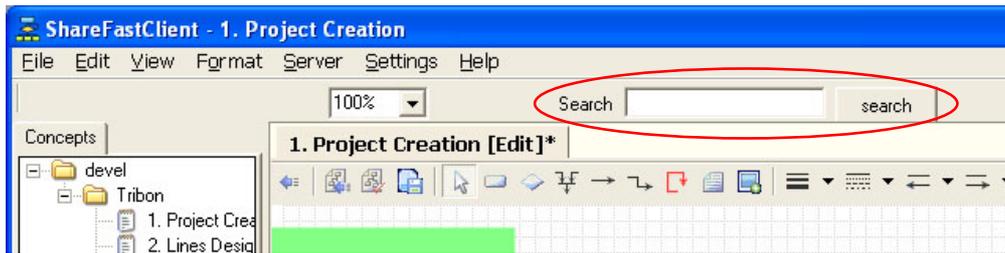


Figure 2-4 Search function

## 2.2.6 Workflow Process Instance Management

Users can create a process instance of any workflow by right-clicking on the workflow name shown in tree view and click ‘Start Process’ menu. The created process instance and its tasks’ status can be seen from the Process Instance tab of the Tree View.

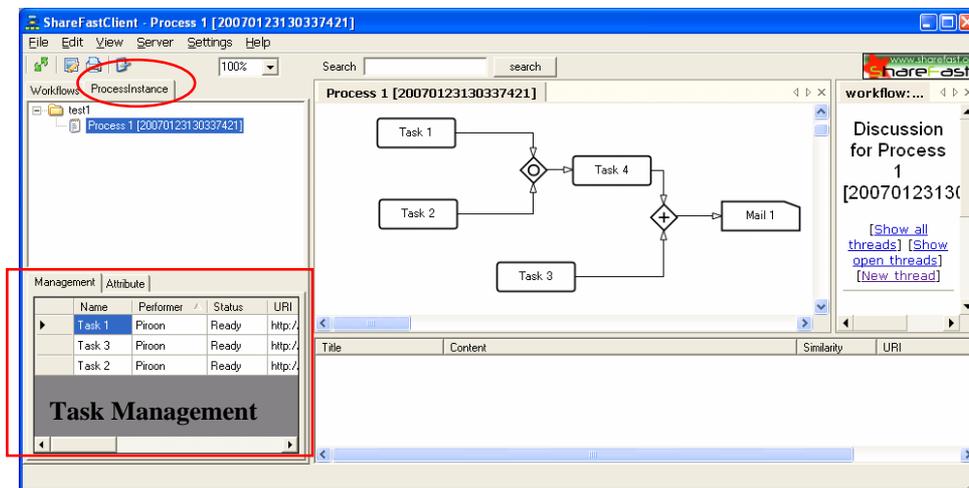


Figure 2-5 Process Instance tab

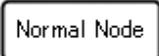
At the Task Management area, users can see all the tasks of the process instance and their attribute such as performer, status and URI. Users can right-click on the task name in the Task Manager and choose a command to display the tasks based on its status or to complete the task. Please note that only tasks with status ‘Ready’ can be completed.

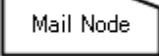
### 2.2.6.1 Task Status

There are four types of task status used in this application.

- None: the task will be ready to complete after its predecessor tasks are completed
- Ready: the task is now ready to complete
- Completed: the task has already been completed
- Cancelled: the task has already been cancelled

### 2.2.6.2 Nodes and Gateways

-  Normal Node: represents the tasks for general propose. The task can be completed by users.

-  Mail Node: represents the tasks for automatic e-mailing propose. The task will be completed automatically (and send an e-mail) after its predecessor tasks are completed.

-  And Gateway: the process will continue through And Gateway after all of its predecessor tasks are completed.

-  Or Gateway: the process will continue through Or Gateway after one of its predecessor tasks is completed.

## 2.2.7 Managing Users

At toolbar, click Server → User. The Organization Administrator Tools will be shown in the Internet browser. From this tool, you can add/update/delete user accounts, list log file, and perform Metadata Management.

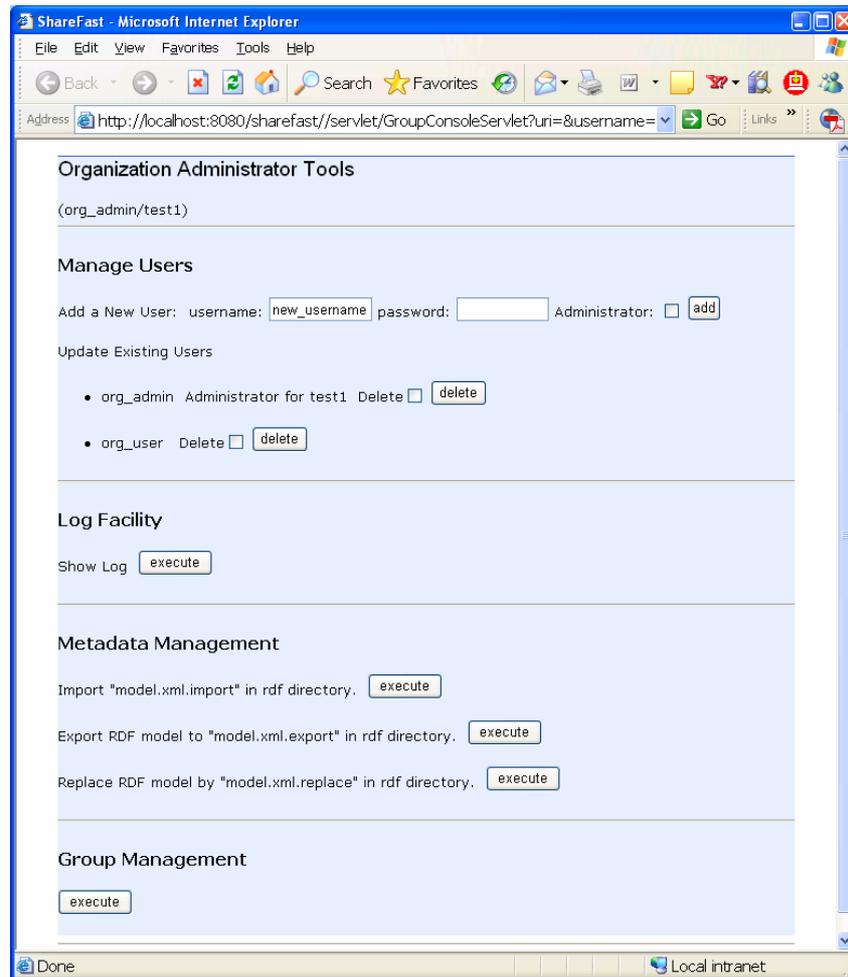


Figure 2-6 Managing user function

### 3. FAQ

- I am using Mozilla Firefox as my web browser, and I cannot install ShareFast software via its installation website. What should I do?

You should install FFClickonce, a Firefox addon, before installing ShareFast Client. The addon is available at <https://addons.mozilla.org/firefox/1608/>

After installing the addon, go to <http://stable11.sharefast.org>. Then, you will see a dialog. Select “Run ClickOnce Application”. After that, you can start the installation.