



Add-In for Microsoft Office and Alfresco

Product Documentation

Version 1.0 | March 2026

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Table of Contents

- 1. Introduction 5**
- 2. System Requirements 5**
 - Microsoft Office 5
 - Alfresco Content Services 6
- 3. Installation and Setup 6**
 - Individual Installation 6
 - Centralized Deployment 6
- 4. Login and Authentication 7**
 - Password-Based Authentication 7
 - Identity Provider (OIDC) 7
 - Single Sign-On and Licensing 8
- 5. Sites 8**
 - All Sites 8
 - Favorites 8
 - Activities 8
- 6. Folders and Files 9**
 - Navigation and Structure 9
 - Sorting and Filtering 9
 - File and Folder Operations 9
- 7. Document Management 9**
 - Action Bar 9
 - Properties and Preview 10
- 8. Version Management 10**
 - Version History 10
 - Upload New Versions 10
- 9. Check-Out and Check-In 10**
 - Check-Out 11

Check-In	11
Checked-Out Files Overview	11
10. Comments	11
Comment Management	11
11. Tags and Search	11
Tag Management	12
Tag Cloud and Filtering	12
12. Search and Filters	12
Full-Text Search	12
Advanced Filters	12
13. Outlook Integration	12
Email Archiving	13
Attachment Management	13
Panel Navigation	13
14. Word, Excel, and PowerPoint	13
Save Documents	13
Open Files	13
15. Workflows and Tasks	14
Task Overview	14
Start Workflow	14
16. Settings	14
User Profile	14
Appearance and Language	14
License and Connection	15
Diagnostics	15
App Information	15
17. Pricing and Licensing	15
Free Trial	15
One Product for All Office Applications	15

License Management	15
Current Prices and Options	15
Right of Withdrawal	16

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 three languages: German, English, 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 can open the Microsoft 365 Admin Center, navigate to Settings > Integrated Apps, and deploy Alfrodin there. You can distribute the add-in 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.

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

Enter your Alfresco server URL, username, and password. Alfrodin immediately encrypts these credentials using AES-256-GCM on your local device. The encryption process uses PBKDF2 with 100,000 iterations and SHA-256 as the hash function to provide maximum security. The encrypted credentials are stored locally on your device and can be updated on the device – not on a server. The next time you log in, Alfrodin offers automatic login without requiring you to enter your credentials again.

Your passwords never leave your local device. Alfrodin only stores encrypted versions and transmits this encryption only to the Alfresco server for authentication. This architecture ensures that your login information is maximally protected.

Identity Provider (OIDC)

For organizations using Single Sign-On, Alfrodin supports OpenID Connect (OIDC). Enter your Keycloak URL or realm, Client ID, and Alfresco server URL. 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. 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.

Single Sign-On and Licensing

For comprehensive SSO integration, Alfrodin also supports Microsoft Entra ID via Nested App Authentication (NAA) to enable license detection. New users can try Alfrodin free for 3 days – no credit card required. After the free trial period, two licensing options are available: purchase a license directly through Microsoft AppSource, which automatically connects to your Microsoft 365 subscription, or use a direct 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. 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 search function allows you to filter activities by specific criteria and quickly find interesting events.

6. 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.

7. 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.

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.

8. 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.

9. 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.

10. 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.

11. 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.

12. 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.

13. 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.

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.

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.

14. 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.

15. 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.

16. 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.

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, or Spanish. The user

interface updates immediately in the selected language.

License and Connection

The License section shows your license status, license type (AppSource or direct), 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, Alfresco version, and edition. You can delete your locally saved credentials.

Diagnostics

For technical support, you can export or delete logs. Change the log level (Debug, Info, Warning, Error). This is helpful when troubleshooting Alfrodin issues. Debug logs are very detailed and can assist with error resolution.

App Information

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

17. 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

All new users receive a 3-day free trial of Alfrodin. No credit card is required to get started. The trial has access to all features and automatically ends when the 3 days are up. This is ideal for testing Alfrodin and seeing if it meets your requirements.

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.

Right of Withdrawal

EU customers have a 14-day right of withdrawal after purchase. For more information, see the Terms and Conditions at www.alfrodin.com.