

## A. Root Folder

\*Root folder only available on Antelope 6 Workspace version.

### I. Background


1. Root folder is the “Home” folder of the folder tree. There are three home folders in each document repository.

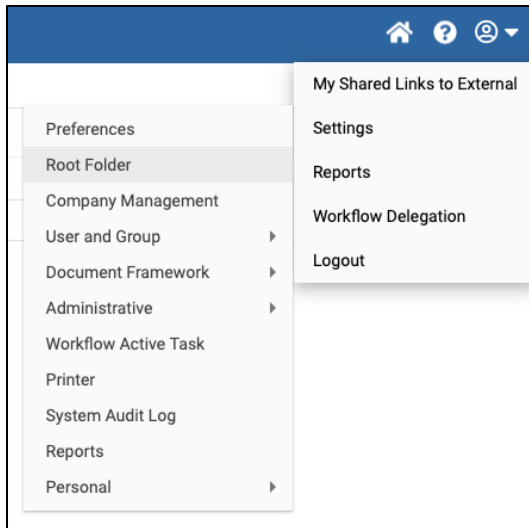
Home Folder Name	Location	Description
Home	Folders: Home	The root folder of the folder tree for storing documents.
Workflow	Application: Workflow	The root folder for all workflow applications.
System	System: System	The root folder for document templates, e-form templates and workflow templates.

2. Each company can only assign one Home folder, one Workflow folder and one System folder. For example, if a company (e.g. SampleCorp Innovation) has two subsidiaries (e.g. PrivateWine), then each business unit is required to have its own set of root folders.




















Company Name	Root Folder
SampleCorp Innovation	Home Workflow System
PrivateWine	Home - PW Workflow - PW System – PW

## II. Creating New Root Folder






1. Step 1 Click the icon  with the login name in right top corner from the top bar from bring up the context menu.
2. From the context menu, select “Settings” > “Root Folder”.





3. The Root Folder window will appear.




















Root Folder								
	Document Profile	Folder Name	Description	Sort Field	Sort A-Z	Filter Owner	Minor Version	Max. Major Version
								
	 Project Profile	Home						50
	 General	System						0
	 General	Workflow						0

4. Fill in the information on the top row.

Field	Description	Default Value
Document Profile	The default document profile of the root folder.	General
Folder Name	Name of the root folder.	
Description	Description of the root folder.	
Sort Field	The default sort column.	
Sort A-Z	Sort alphabetical order by folder name.	
Filter Owner	If user account does not have Manage rights on the folder, he/she can only see his/her own records.	
Minor Version	Support minor version.	0
Max. Major Version	The maximum major version allowed.	0
Show Page Count	Show page count of PDF documents.	
Copy Index	If apply indexes on the folder, the index values will apply to its child documents.	
Quota Schema	The default quota schema on the folder.	




















Rule	Naming rules when create new sub-folders or documents under the root.	
Watermark	Apply watermark when preview the documents.	

5. Click the add button  on the first column to create a new root folder.

Root Folder							
	Document Profile	Folder Name	Description	Sort Field	Sort A-Z	Filter Owner	Minor Version
	General	Sample					
 	Project Profile	Home					
 	General	System					
 	General	Workflow					

### III. Modifying Existing Root Folder


1. To modify an existing root folder, click the Folder Name of the root folder record. The textbox will appear.

Root Folder							
	Document Profile	Folder Name	Description	Sort Field	Sort A-Z	Filter Owner	Minor Version
							
 	Project Profile	Home					
 	General	System					
 	General	Workflow					

Note: You cannot change the document profile of an existing root folder (or folder). Once the folder is assigned with a document profile, it is set permanently.

2. After modifying, click the Save icon  to commit changes.

### IV. Delete Root Folder

- To delete a root folder, click the delete icon .
- A confirmation message "Are you sure" will appear.
- Click "OK" button to confirm deleting.