

Antelope 6 Workspace Administration Manual

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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 ⁽²⁾ 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".

		* 9 9
		My Shared Links to External
Preferences		Settings
Root Folder		Reports
Company Management		Workflow Delegation
User and Group	Þ	
Document Framework	+	Logout
Administrative	×.	
Workflow Active Task		
Printer		
System Audit Log		
Reports		
Personal	Þ.	

3. The Root Folder window will appear.

R	Root Folder								
			Document Profile	Folder Name	Description Sort	Field Sort A-Z	Filter Owner	Minor Version	Max. Major Version
	0					0	0	0	
	1	Ŵ	Project Profile	Home		0	0	0	50
	6	۵	General	System		0	0	0	0
	5	۵	General	Workflow		0	0	8	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.	\oslash
Filter Owner	If user account does not have Manage rights on the	\oslash
	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.	\oslash
Copy Index	If apply indexes on the folder, the index values will	\oslash
	apply to its child documents.	
Quota Schema	The default quota schema on the folder.	\oslash

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

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

Root Fo	Root Folder							
		Document Profile	Folder Name	Description	Sort Field	Sort A-Z	Filter Owner	Minor Version
€		General	Sample			0	0	0
6	Û	Project Profile	Home			0	0	0
D	Û	General	System			0	0	0
6	Û	General	Workflow			0	9	9

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.

Ro	Root Folder										
			Document Profile	Folder Name	Description	Sort Field	Sort A-Z	Filter Owner	Minor Version		
	(+						8	0	6		
	3	Ŵ	Project Profile	Home			0	0	0		
	5	Ŵ	General	System			0	Ô	0		
	8	Î	General	Workflow			0	0	0		

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 \bigcirc to commit changes.

IV. Delete Root Folder

- 1. To delete a root folder, click the delete icon $\overline{\amalg}$.
- 2. A confirmation message "Are you sure" will appear.
- 3. Click "OK" button to confirm deleting.

B. Company Management

*Company management only available on Antelope 6 Workspace version.

I. Background

Company management is holding the root folder for those Antelope 6 Server which have more than one companies for user to access.

System support creates Company and assign different root folder to each node. Administrator can assign user to different Company such that user who is required to manage different Company level

II. Creating New Company

- 1. Click the icon [®] with the login name in right top corner from the top bar from bring up the context menu, then select "Settings" > "Company Management".
- 2. The Company Management window will appear.



- 3. Click the add button $\textcircled{\bullet}$ in right of top corner from the top tools bar.
- 4. The Add window will appear.

Add	Update	×
Company Name Root Folder Workflow Folder System Folder Is Indenendent	• • •	

5. Fill in the information in Add window.

Add		Update	×
Company Name	SampleCorp		
Root Folder	Home - SampleCorp	•	
Workflow Folder	Workflow - SampleCorp	•	
System Folder	System - SampleCorp	•	
Is Independent	0		

Field	Description	
Company Name	Input the name of which Company used.	
Root Folder	Select which Root folder to save document.	
Workflow Folder	Select which folder to save workflow information.	
System Folder	Select which folder to save system information.	
Is Independent	Set the Company which is independent with other Company in lower level.	

Note: Different Company should not use the same Root Folder, Workflow Folder and System Folder. And the Root Folder, Workflow Folder and System Folder should not use the same folder.

6. Click the Update button in right of top corner from the top tools bar to commit changes.



III. Modify Existing Company

- 1. To modify an existing Company, select the "Company Name".
- 2. And click the edit button.
- 3. The Edit window will appear.
- 4. After modifying, click the "Update" button to commit changes.

IV. Delete Company

- 1. To delete a Company, select that Company name.
- 2. Click the delete icon $\overline{\amalg}$ in right of top corner from the top tools bar.
- 3. A confirmation message "Are you sure?" will appear.
- 4. Click "OK" button to confirm deleting.

C. User and Group

I. Create new User Account

1. Click the icon ⁽²⁾ with the login name in right top corner from the top bar from bring up the context menu, then select "Settings" > "User and Group" > "User".



2. The User window will appear.

User							×
Q		Username	Description	Password Email Add	ress Domain	Company	
	· - B			*******			
		admin	Antelope	******	System	Company	

3. Fill in the information on the top row.

User													×
Q								Username	Description	Password	Email Address	Domain	Company
			۲		Ð			genie	Genie	*******	genie@samplecorpinnovation.com		Company
	1	绺		1	Θ	¢	¢	admin	Antelope	*******		System	Company

Field	Description	Default Value
Username*	Login username of this user.	
Description	User's full name.	
Password*	Password of the user, with minimum 1 upper case, 1	*****
	lower case, 1 symbol and at least 10 characters.	
Email*	Email assigned to the user.	
Domain*	Domain of creating user.	
Company*	Assign Company for this user.	
Default Group	Group which is assign to this user.	
Mobile	Mobile phone number of user account	
Pwd Never	Password never expire or not for the user.	\Diamond
Expire		
Locked	The user is locked.	\bigcirc
Disabled	The user is disabled.	\oslash

Used with specific control on MEAP	****
The limited quota assign to the user.	
The latest modified date and time of the user.	
The created date of the user.	
	Used with specific control on MEAP The limited quota assign to the user. The latest modified date and time of the user. The created date of the user.

(* would be the necessary column when create user.)

4. Click the add button 🖸 on the first column to add a new user.

II. Modify Existing User Account

- 1. Open the User window.
- 2. Click the value which is required to change.
- 3. After modifying the user information. The save button **on the left-hand side will be** available.
- 4. Click save button ^(B) to commit changes.

III. Delete User Account

- 1. Open the User window.
- 2. Looking for the existing user which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

IV. Assign User Account to User Group

- 1. Open the User window.
- 2. Looking for the user record which is required to assign the user group and function level.
- 3. Click the $\stackrel{\text{res}}{\sim}$ button on the third column beside the selected user.
- 4. User Group and Function Level of [Selected Username] window will appear.

User Group and Function Level of genie						
User Group of genie			Function Level of genie			
Group	lame De	scription	Functional Level	Description		
\oplus			\oplus			

5. Click the top empty column to select the "User Group" and "Function Level".

Select G	iroup	ОК	×
Name			
1	Administration Group \$Administrators	Se	lect
1	Accounting Department Accounting	Ur	nselect
1	Human Resources Department Human Resources	Se	lect

6. After the selection, click add button \oplus on the first column.

U	User Group and Function Level of genie						
	User Group	of genie					
		Group Name	Description				
	÷	Accounting Department					

U	User Group and Function Level of genie							
	Use	r Group	o of genie					
			Group Name	Description				
	(Ð						
	创	살	Accounting	Accounting Department				

Note:
User could have more than one user group and function level when required.
The default user group button 🔛 will appear when each user have more than one user group.
Click default group button 🗠 beside which group to be default group for that user.

V. Replace User Account

1. From the User Account Management panel, click the "Replace" ♀ button on the left for user account which is required to be replace by another user.

Í.	Ŵ	0°		:4	Θ	0	¢	admin
8	⑪	<u>8</u>	₿	1	\oplus	Ø	¢	alice

2. The Select User(s) window will appear. Select an user account.

Select User(s)	×
Name user	
User1 User1	Select
User2 user2	Select

- 3. A confirmation message "Confirm to replace user?", will appear.
- 4. Click the OK button to confirm replacing user account.
- 5. A notice message "Success!", will appear. The "Disable" column of replaced account will auto change to 📀 icon.

VI. Supplementary Company (Not available on Antelope 6 Cloud Version)

1. From the User Account Management, select a user account, click the icon to bring up the Access Supplementary Unit window.

6	⑪	30	₿	:	Θ	Ø	¢	admin
6	⑪	<u>'</u>		:4	\oplus	¢	¢	alice

2. Click the first empty row.

Supplementary Company Unit of alice							
	Company						
÷							

3. Select a Company, click the OK button to save your changes.



4. Click the Add button to add the Supplementary Company Unit.



VII. Assign Concurrent User Account to Named User Account

- 1. Select a user account.
- 2. Click the assign ticket button \oplus in the fifth column to assign name license.

Û	뿂		1	Θ	¢	¢	admin
Û	<u>8</u>	₿	1	Ð	¢	¢	alice

3. The user account is changed into named one.

Ŵ	ŝ	Ħ	4	Θ	ŋ	¢	admin
Û	瓷		•	Θ	¢	¢	alice

VIII. Assign User Account with Secretary (Not available on Antelope 6 Cloud Version)

- 1. From the User Account Management, select a user account > Secretary.
- 2. The "Select User(s)" window will appear.
- 3. Select the user(s) to be the secretary of the selected user record.
- 4. The save button on the left-hand side will be available.
- 5. Click save button 🖻 to commit changes.

IX. Assign User Account with Quota Schema

1. From the User Account Management, select a user account > Quota Schema.

Pwd Never Expire	Locked	Disabled	Device Password	Quota Schema
•	•	•	****	
0	•	•	*****	
•	•	•	******	

2. Select an option from the Quota Scheme pull-down list.



3. Click save button **b** to commit changes.

D. User Group

I. Create New User Group

- 1. Click the icon $^{\textcircled{0}}$ 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" > "User and Group" > "User Group".
- 3. The User Group window will appear.

Use	User Group											
>					Company	Group Name	Description	Modified Date	Audit log	Folder		
			÷						0	0		
	13)	⁸	Ø	TOP	\$Administrators	Administrator Group	2021-01-25 14:36:35	0	0		
)	양	¢	TOP	\$System Services	System Service Accounts	2021-01-25 14:36:34	0	0		
	8	۵	8°	¢	TOP	All		2021-01-20 12:59:19	0	٢		
	8	Û	部	Ø	ТОР	Design	Design	2020-12-30 16:46:46	0	۲		
	8	۵	恣	¢	TOP	Director	Director Group	2020-12-30 12:59:25	0	٨		
	đ	Û	諮	Ø	TOP	F&A	Finance & Accounting Department	2021-01-25 14:41:36	0	0		
		Û	ŝ	¢	TOP	Group - FDWSJ		2020-09-14 22:00:01	0	0		
	T	Û	瓷	Ø	ТОР	HR	Human Resources Department	2021-01-25 14:41:35	0	0		

4. Fill in the information on the top row.

	Company	Group Name	Description
⊕	ТОР	Sample Group	
B 23 (P	ТОР	\$Administrators	Administrator Group
5 x C	ТОР	\$System Services	System Service Accounts
ී ඕ පී C	TOP	All	

Field	Description	Default
Company*	Assign Company for this user group.	
Group Name*	Name of the user group.	
Description	User group description.	
Modified Date	Latest modified date and time of this user	
	group.	
Audit Log*	Able to view the audit log.	\oslash
Folder*	Able to access the folder.	\oslash
Document Profile*	Able to manage document profile.	\oslash
User and Group*	Able to manage user and group	\oslash
Recycle Bin*	Able to access recycle bin	\oslash
Recycle Bin View All	Able to view all document deleted by other	\oslash
Documents*	user in recycle bin	
Purge Recycle Bin File*	Able to purge document in recycle bin.	\oslash

Root Folder*	Able to manage root folder.	\oslash
Permission Level*	Able to manage permission level.	\oslash
Application*	Able to access "Application" folder.	\oslash
System*	Able to access "System" folder.	\oslash
Administrative*	Able to manage "Administrative" setting.	\oslash
Authorization*	Able to manage "Authorization" setting.	\oslash
Dashboard Designer*	Able to manage "Dashboard Designer"	\oslash
	setting.	

(* would be the necessary column when creating a user group.)

5. Click the add button 🖸 on the first column to create a new user group with filled information.

II. Modify Existing User Group

- 1. Open the User Group window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹³ on the left-hand side will be available.
- 4. Click save button ^(E) to commit changes.

III. Delete User Group

- 1. Open the User Group window.
- 2. Select the existing user group which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

IV. Add User Account into User Group

- 1. Open the User Group window.
- 2. Looking for a user group which is required to add user.
- 3. Click the ²⁶ button on the third column.
- 4. Member Lists window will appear.
- 5. Click the top empty column for select user.
- 6. The "Select user or group" window will appear.
- 7. Select the user for adding to the selected group.
- 8. Click the add button \oplus at the first column to add the selected user.

V. Add User Group into User Group

- 1. Open the User Group window.
- 2. Looking for a user group which is required to add user.
- 3. Click the ²⁶ button on the third column of the selected user group.
- 4. Member Lists window will appear.
- 5. Click the top empty column for select user.
- 6. The "Select user or group" window will appear.
- 7. Click the "Users" on the left of top to bring up a dropdown list.
- 8. Select "User Group" to change the list to user group selection.
- 9. Select the group for adding to the selected group.
- 10. Click the add button \oplus at the first column to add the selected user group.

E. Functional Level

I. Background

1. Functional level can be used to create job title for a group of users. One user can be assigned more than one functional level by system administrator or which group have access right to manage the user management.

II. Create New Functional Level

- 1. Click the icon $^{\textcircled{O}}$ 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" > "User and Group" > "Functional Level".
- 3. The Functional Level window will appear.

Fu	Functional Level						
Þ				Company	Functional Name	Description	Modified Date
		\oplus					
	L.	Û	200	TOP	AA	11 Associate Assistant	2020-08-18 22:54:44
	E0	Û	음	TOP	AAO		2020-11-24 13:40:33
	6	Ŵ	200	TOP	AM	07 Assistant Manager	2020-08-18 22:54:44
	(1) (1)	Ŵ	200	TOP	AO	10 Assistant Officer	2020-08-18 22:54:44

4. Fill in the information on the top row.

F	Functional Level						
9	•			Company	Functional Name	Description	Modified Date
		۲		TOP	Sample	Sample Functional Level	
	đ	Û	將	TOP	AA	11 Associate Assistant	2020-08-18 22:54:44
	E	۵	<u>8</u>	TOP	AAO		2020-11-24 13:40:33

Description
Assign Company for this user group.
Display name of the functional level.
User group description.
Latest modified date and time of this functional level.

(* would be the necessary column when creating functional level.)

5. Click the add button 🕒 on the first column to create the new functional level.

III. Modify Existing Functional Level

- 1. Open Functional Level window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹ on the left-hand side will be available.
- 4. Click save button 🛅 to commit changes.

IV. Delete Existing Functional Level

- 1. Open the Functional Level window.
- 2. Select the existing functional level which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

V. Assign User Account to Functional Level

- 1. Open the Functional Level window.
- 2. Looking for a functional level which is required to add user.
- 3. Click the $\stackrel{\text{\tiny Def}}{\longrightarrow}$ button on the third column.
- 4. Member Lists window will appear.
- 5. Click the top empty column for select user.
- 6. The "Select User(s)" window will appear.
- 7. Select the user(s) for adding to the selected functional level.
- 8. Click the add button \oplus at the first column to add the selected user.

VI. Assign User Group to Functional Level

- 1. Open the Functional Level window.
- 2. Looking for a functional level which is required to add user group.
- 3. Click the ^绺 button on the third column.
- 4. Member Lists window will appear.
- 5. Click the top empty column for select user.
- 6. The "Select user or group" window will appear.
- 7. Select the user group for adding to the selected functional level.
- 8. Click the add button \oplus at the first column to add selected user group.

F. Organization Chart

I. Background

1. Organization Chart is a mapping about the organization between different user, user group and functional level

II. Create New Organization Chart

- 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" > "User and Group" > "Organization Chart".

3. The Organization Chart window will appear.

(Organization Chart						
1	Þ			Company	Name		Description
		Ð		Company	Sample C	Drg Chart	
	6	Ŵ	(i)	Company	Default		

4. Fill in the information on the top row.

Description
Assign Company for this organization chart.
Name of the organization chart.
Description of the organization.

(* would be the necessary column when creating organization chart.)

5. Click the add button O on the first column to create a new organization chart.

III. Modifying Existing Organization Chart

- 1. Open the Organization Chart window.
- 2. Click the value which is required to change.
- 3. After modify the information. The save button ¹ on the left-hand side will be available.
- 4. Click save button 🛅 to commit changes.

IV. Delete Existing Organization Chart

- 1. Open the Organization Chart window.
- 2. Select the existing organization chart which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

V. Create a New Node

1. Open the Organization Chart window, click the details button beside the selecting record.

•			Company	Name
	\oplus			
Ð	Û	١	Company	Sample Org Chart

2. A window with selected record name will appear.

Sample Org Chart	
Add New Level	

3. Click the text "Add New Level" to bring up a drop-down list for add a functional level.



4. Select the functional level, click save button 🛅 to commit setting.



5. A new node is assigned.

Sample Org Chart	
Project Team A	
Add New Level	

6. From the tools bar on the right of top, click the "Add" button 🕒.



7. New Organization Chart Item window will appear.

Organization Chart	Add	×
New Members		
Add at level		~

8. Fill in the information for the item.

Organization Chart	Add	×
New Members		
User1;User2		
Add at level		
Project Team A		~

Field	Description
New Members	Assign user(s) or user group(s) for selecting level.
Add at level	Add the item to selected level.

- 9. Click "Add" button to add the new organization chart item.
- 10. The selected user(s) or user group(s) will be added to the selected level.

VI. Replace a Node

- 1. Open the Organization Chart window.
- 2. Looking for the organization chart record which is required to modify the details.
- 3. Click the details button is beside the selecting record to open the details of organization chart.
- 4. Click to select the item which is required to replace. The background color of select item will change to yellow.
- 5. After selected item, click the replace button \square in tools bar on the right of top corner.
- 6. The "Select user or group" window will appear.
- 7. Select another user(s) or user group(s) to replace the existing user(s) or user group(s).

VII. Delete a Node

- 1. Open the Organization Chart window.
- 2. Open the details of selected organization chart record.
- 3. Click to select the item which is required to replace.
- 4. From the tools bar on the right of top, click 🔟 button to delete selected item.
- 5. A confirmation message "Are you sure?" will appear.
- 6. Click "OK" button to confirm deleting.

VIII. Cut a Node

- 1. Open the Organization Chart window.
- 2. Open the details of selected organization chart record.

URA-G1-OC	
Coordinator	HRD - Sync with lookup User Div / Dept Table
AA	Test User B
AO	Test User A
Add New Level	

- (e.g Organization Chart "G1-OC" have 3 levels, Level 1st "Coordinator", Level 2nd "AA" and Level 3rd "AO". Coordinator "HRD" want to cut Test User A to under Test User C.)
- 4. Click and select the item which is required to cut.
- 5. From the tools bar on the right of top, click $\frac{1}{8}$ button to cut the selected item.
- 6. Click and select another item which is required to connect with the caught item.
- 7. After selected connect item, click paste button 🗈 to connect.

URA-G1-OC		
Coordinator	HRD - Sync with lookup User	Div / Dept Table
AA	1 Test User B	Test User C
AO		1 Test User A

IX. Export Organization Chart

- 1. Open the Organization Chart window.
- 2. Open the details of selected organization chart record.
- 3. From the tools bar on the right of top.
- 4. Click export button \checkmark to export an organization chart.
- 5. The download will be started.

X. Import Organization Chart

- 1. Open the Organization Chart window.
- 2. Open the details of selected organization chart record.
- 3. From the tools bar on the right of top.
- 4. Click import button 🗄 to import an organization chart.
- 5. A Import window will appear.
- 6. Click "Select" button to select the organization chart file to import.
- 7. After select the file, click the "Upload" button to import the organization chart.

G. Document Profile

I. Background

 System allows administrator to design different Document Profile and assign it to a folder. When browsing the folder, the defined Document Profile would be the column in that folder. Also document or folder created inside this folder would allow inputting information base on the setting in the Document Profile fields. Those fields can be used to search the documents, folder or sorting in order to easier to locate document you want.

II. Create New Document Profile – Master Type

- 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" > "Document Framework" > "Document Profile".
- 3. The Document Profile window will appear.

locumer	nt Profile	0							•	- 1
×			Company	Document Profile	Level	Description	Rule	Parent		
	•	Ð								
(12)	0	0	Company	Agreements	Master	Agreements				
00	۵	٢	Company	Bill of Lading	Master	Bill of Lading				
$\langle 00 \rangle$		0	Company	Bill of Lading Line Items	Detail	Bill of Lading Line Items				
89.		٩	Company	Customer Survey Form	Master	Customer Survey Form (for User Manual)				
10	۵	٩	Company	Customer Survey Form Line Items	Detail	Customer Survey Form Line Items				
80		٩	Company	Emails	Master	Email Document Type				
130	8	0	Company	Employee Profile	Master	Employee Profile				
10	۲	٢	Company	Employee Profile Emergency Contact	Detail	Employee Profile Emergency Contact				
(12)		0	Company	Employee Profile Employment List	Detail	Employee Profile Employment List				
(3)		0	Company	General	Master	General Document Type				
(12)		0	Company	Invoice Items	Detail	Invoice Line Items				
(1)		٩	Company	Invoices	Master	Invoices				

4. Input a new Document Profile name.



5. Select "Master" from Level.

Document Profile										
Þ				Company	Document Profile	Level	Description			
	۲		Ð		Resume	Master				
	1	۵	0	Company	Agreements	Detail Index Lookup	Agreements			
	1	۵	(1)	Company	Bill of Lading	Master	Bill of Lading			
	150	۵	0	Company	Bill of Lading Line Items		Bill of Lading Line Items			

6. The following are other options which you can select.

Field	Description
Company*	Assign Company for the document profile.
Document Profile*	Name of the document profile.
Level*	Level of the document profile.
Description	Description of document profile.
Rule	Setting the rule of document profile.
Parent	Assign parent document profile for this record.
Content Base	Content base of the document profile.

(* would be the necessary column when creating a new document profile.)

- 7. Click the add button on the first column to create a new document profile.
- 8. A new Document Profile is created.

Document Profile										
•				Company	Document Profile	Level	Description			
	() ,	Ð							
	6	۵	(i)	Company	Resume	Master				

III. Modify Existing Document Profile

- 1. Open the Document Profile window.
- 2. Click the value which is required to change.
- 3. After modify the information. The save button 🛅 on the left-hand side will be available.
- 4. Click save button ¹ to commit changes.

IV. Delete Existing Document Profile

- 1. Open the Document Profile window.
- 2. Select the existing document profile which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

V. Create New Index Field

- 1. Open the Document Profile window.
- 2. Looking for the document profile which is required to create index fields.
- 3. Click the information icon. \bigcirc

0	⑪	(i)	Company	Resume	
---	---	------------	---------	--------	--

4. The "Document Profile Fields of [Selected document profile name] window will appear.

5. Fill in the information on the top row.

Do	Document Profile Fields of Resume										
						Туре	Name	Length	Format		
			\oplus								
	U	۵	\uparrow	\downarrow	\oslash	String	Canadidate Name	50			
	6	⑪	\uparrow	\checkmark	\odot	String	Position Apply	100			
	B	Û	\uparrow	\checkmark	\oslash	String	Availability Period	20			
	1	Û	\uparrow	\downarrow	\oslash	String	Request Salary	20			
	P	⑪	\uparrow	\downarrow	\otimes	String	Skillset	100			

Field	Description
Type*	Can be String, Number, Datetime, Boolean, Integer, Detail and User.
	String – Free text and allow to setup the lookup
	Number – Numeric value and allow to format it
	Datetime – Date format with date picker to choose value and allow to
	format
	Boolean – True or false only
	Integer – A number without decimal.
	Detail – A detail type document profile.
	User – A user account
Name*	The display name for the field
Length	The maximum allowed length for the field. For number, datetime, Boolean
	and integer, this is fixed
Format	The display format for datetime, number and integer. This must match with
	the type or otherwise has no effect.
Default Value	The default value to the field
Rule	Assign rule to the field
Lookup	Choose the lookup to provide a pull down to setup the value. The type of
	the field must be string to make it effective.
Input	Change input value for the field.
Mandatory	Is the field require to input value before the document can upload.
Multiple Select	If lookup is setup, the value will able to multiple select. If enable, there will
	be checkbox in front of the pull down options.
Encrypt Value	Enable to change the value to the encrypted value.
Control	Enable to control the field.

Show in Summary	Enable to display in summary.						
Document Profile	Assign workflow to document profile.						
(* would be the necessary column when create a fields.)							

6. Click the add button 🕑 on the first column to create a new index field.

VI. Modify Existing Index Field

- 1. Open the Document Profile window.
- 2. Open the selected Document Profile Fields window.
- 3. Click the value which is required to change.
- 4. After modifying the information. The save button ¹⁰ on the left-hand side will be available.
- 5. Click save button 📴 to commit changes.

VII. Delete Existing Index Field

- 1. Open the Document Profile window.
- 2. Open the selected Document Profile Fields window.
- 3. Select the existing index field which is required to delete.
- 4. Click the delete icon $\overline{\blacksquare}$ on the second column.
- 5. A confirmation message "Are you sure?" will appear.
- 6. Click "OK" button to confirm deleting.

VIII. Create Details Document Profile for Line Items

- 1. Open the Document Profile window.
- 2. Create new document profile with using "Detail" in "Level" field.
- 3. Fill in the information on the top row.
- 4. Click the add button 🕒 on the first column to create a new document profile.

H. Index Lookup

I. Background

1. Index Lookup is provided a pull-down list for setup the value. The type of the field must be string to make it effective.

II. Create New Index Lookup

- 1. Click the icon $^{\textcircled{0}}$ 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" > "Document Framework" > "Index Lookup".
- 3. The Index Lookup window will appear.

Index	ookup									(1)	×
					Company	Name	Туре	Document Profile	Sync With Group		
									•		
	- 00		0	0	Company	Address Area	Simple		•		
	100	Û	0	0	Company	Address District	Simple		•		
	m	۲	0	0	Company	Agreement Type	Simple		•		
	10	۵	٩	0	Company	Department	Simple		•		
	60		٢	0	Company	Employment Status	Simple		•		
	8		٩	0	Company	Financial Year	Simple		•		
	100	۵	11	0	Company	Gender	Table	Lookup: Gender	•		
	10		0	0	Company	HR Document Type	Simple		•		
	.89	۵	٩	0	Company	Leave Application Type	Simple		•		
	10	۵	0	0	Company	Marital Status	Simple		•		
4. Fill in the information on the top row.

Index Lookup								
×		Company	Name	Туре				
	€	Company	Resume Selection	Simple				

Description
Assign Company for the document profile.
Name of the index lookup.
Type of the index lookup, it can be Simple, Table and
Access Limit Table.
Index lookup list template in document profile.
Setting the rule of document profile.

(* would be the necessary column when create a new index lookup.)

5. Click the add button $\textcircled{ \odot }$ on the first column to create a new index lookup.

Index Lookup									
×					Company	Name	Туре		
			Ð						
	1	Ŵ	(j)	\odot	Company	Resume Selection	Simple		

III. Modify Existing Index Lookup

1. You can modify the Name, Type and Document Profile fields .

1	ndex Lookup									
	×					Company	Name	Туре		
				Ð						
			Û	(1)	\oslash	Company	Resume Selection	Simple		
		8	Û	١	\oslash	Company	Address Area	Simple		

2. Click the save button to commit changes.

Index Looku	ndex Lookup							
×				Company	Name	Туре		
		Ð						
8	Û	(i)	\otimes	Company	Resume Selection 1	Simple		
8	⑪	(i)	\otimes	Company	Address Area	Simple		

IV. Delete Existing Index Lookup

1. Click the delete icon $\overline{\mathbb{U}}$.

Index L	Index Lookup									
×					Company	Name	Туре			
	۲									
	8	۵	١	Ø	Company	Resume Selection	Simple			
	U	🗓 R	emove	\otimes	Company	Address Area	Simple			

- 2. A confirmation message "Are you sure?" will appear.
- 3. Click "OK" button to confirm deleting.

V. Index Lookup Permission

- 1. Open the Index Lookup window.
- 2. Looking for the index lookup which is required to assign to the user group.
- 3. Click the Permission button $^{\scriptsize \ensuremath{ \odot}}$ beside the selected index lookup record.

jo	创	(i)	\otimes	Company	Resume Selection	
6	⑪	(i)	Pe	rmission npany	Address Area	

4. Permission window will appear.

I	ndex Lo	ookup								
T	×					Company	Name		Тур	e
			Û	(1)	\oslash	Company	Resume Selection		Sim	ple
			1	(i)	0	Permission		\$	×	le
				١	0	Grou	ip Name			le
				١	0	÷				le
			Û	١	0					le

5. Select the user group for assigned to access the selected index lookup.



6. After select the user group, click add button $\textcircled{\textcircled{}}$ to add the selected user group.

VI. Create Simple Item Index Lookup

1. Create an Index Lookup record with Type = Simple.

index Lookup								
Þ.					Company	Name	Туре	
	۲							
	1	Ŵ	(i)	\otimes	Company	Resume Selection	Simple	
	8	Û	(0	Company	Address Area	Simple	

2. Click the detail icon \bigcirc .

Ð	Û	 Ø 	Company	Resume Selection	Simple
5	۵	(Detail	Company	Address Area	Simple

- 3. The Detail window will appear.
- 4. Fill in the "Query or Text" in the window.

Detail	Update) ×
Editable		
OFF		
Server		
Database		
Query or Text		
Consider		
Not Consider		
<u></u>		0

Field	Description
Editable	Enable user edit the text of the index lookup.
Server	Connect with the server path.
Database	Connect with the database.
Query or Text	The selection of index lookup.

5. After modify, click the Update button to save your changes.

VII. Create Simple Item with DB Connection Index Lookup

1. From the Detail window, input Server = local, Database = Antelope. This will connect to the local Antelope database.

Detail	Update	×
Editable		
local		
Database		
Antelope		

2. You can write a Query to retrieve information.

Detail	Update) ×
Editable		
OFF		
Server		
local		
Database		
Antelope		
Query or Text		
SELECT DISTINCT [DEPARTMENT] FROM [USERTABLE]		
		0

3. After modify, click the Update button to save your changes.

VIII. Create Table Type Index Lookup

1. Table Type Index Lookup is different from Simple Index Lookup. Simple type one contains only a pull-down list of selection, while Table type is a 2-D matrix. The following is an example:

	Simple type Index Lookup	Table type Index L	ookup	
Sample	Supplier A	Supplier Name	Business Nature	Contact Person
	Supplier B	Supplier A	Food & Beverage	Peter
	Supplier C	Supplier B	Computer	John
		Supplier C	Stationary	Alan

The main use case for Table type Index Lookup are mainly on eForm. In the following example, when you select a supplier from the eForm, system will retrieve from the database and auto fill-in both Business Nature and Contact Person textboxes.

Supplier Name	V Supplier A	Supplier Name	Supplier A
Business Nature	Supplier B Supplier C	Business Nature	Food & Beverage
Contact Person		Contact Person	Peter

Another use case is Document Profile. In the below example, you want to fill-in the Supplier Name.

🗏 🙆 Hom	ne > Accounting > Pi	urchase Orders >	PO-120004.pdf				< > e
☆ Edit Re	elation Share To	Compare	Index Reminde	r Redaction	Al Genie		
Index List		🕲 ×		139% ~ Θ	⊕ & □	Ver 1.0 / by Jennifer T	am v Q D
File Name	PO-120004.	pdf					
Size	97 KB						
Version	1.0		C	alian A			
Version Date	2024-09-12	15:57:04	Sup	Jiler A		PURCHA	SE ORDER
Version By	Jennifer Tan	1				i ondini	on one bit
Hash Tag			Custom	er Name:	Payment:	PO No.	PO-120004
PO No.			AWELL	long Kong Limite	d 30 DAYS	PO Date	2024-07-01
Supplier Name			Planet E	xpress		Quotation No.	QUO-0025
Quotation No.						Currency	HKD
PO Date							
Ship To					N 1 P.		
Bill To					Natural Esse	ntials	
Taxation	0.0000		Item #		Description	Qty Price	Extended Price
Total Amount	0.0000		1522	Les Grands C	henes Medoc CB 2011 3-Pack	1 \$540.0	0 \$540.00
Items	Details		1510	Feudo Macca	ri Saia Sicilla 2011 6-Pack	2 \$1,308.0	0 \$2,616.00

When you select the Supplier Name index field, the entire lookup table is shown for your selection, instead of just a simple pull-down list of Supplier Name.

It	ems							
	×	Supplier Name	Business Nature	Contract Person	Contact No.	Email Address	Register Since	Is Active?
	~	Supplier A	Food & Beverage	Peter	1234567	peter@demo.com	2020-09-02	0
	~	Supplier B	Hardware	John	1234567	john@demo.com	2023-07-12	0
	~	Supplier C	Stationary	Alan	1234567	alan@deemo.com	2019-04-01	0

2. To create a Table type Index Lookup, the first thing is to build a Document Profile.

Documer	t Profile	Fields	of Look	up: Sup	plier Name			
					Туре	Name	Length	Format
		\oplus						
6	Û	\uparrow	\checkmark	\oslash	String	Supplier Name	100	
6	Û	\uparrow	\checkmark	0	String	Business Nature	50	
1	Û	\uparrow	\checkmark	\oslash	String	Contract Person	20	
8	Û	\uparrow	\checkmark	\oslash	String	Contact No.	20	
8	Û	\uparrow	\checkmark	\otimes	String	Email Address	255	
6	Û	\uparrow	\checkmark	0	Datetime	Register Since	10	(Datetime) yyyy-MM-dd
3	Û	\uparrow	\checkmark	\otimes	Boolean	Is Active?	1	

3. Then create a Table type Lookup List by mapping the Document Profile to Supplier Name.

Index	Lookup								
*					Company	Name	Туре	Document Profile	
							Table	×	~
			Ð						
	1	Ô	11	\otimes	Company	Gender	Table	Lookup: Gender	
	(8)	Û	II	\otimes	Company	Supplier List (Advanced)	Table	Lookup: Supplier Name	

4. Click the Items icon.

10	创	ΞΞ	\oslash	Company	Gender
10	⑪	II	\otimes	Company	Supplier List (Advanced)
		It	ems		

5. Fill-in the records for this Lookup Items.

Business Nature	Contract Person	Contact No.	Email Address	Register Since	Is Active?	Owner	Modified Date
					-		
					•		
Food & Beverage	Peter	1234567	peter@demo.com	2020-09-02	0	jennifer	2024-09-12 15:50:56
Hardware	John	1234567	john@demo.com	2023-07-12	0	jennifer	2024-09-12 15:51:18
Stationary	Alan	1234567	alan@deemo.com	2019-04-01	0	jennifer	2024-09-12 15:51:51
	Food & Beverage Hardware Stationary	Food & Beverage Peter Hardware John Stationary Alan	Food & Beverage Peter 1234567 Hardware John 1234567 Stationary Alan 1234567	Food & Beverage Peter 1234567 peter@idemo.com Hardware John 1234567 john@demo.com Stationary Alan 1234567 alan@demo.com	Food & Beverage Peter 1234567 peter#demo.com 2020-09-02 Hardware John 1234567 john@demo.com 2023-07-12 Stationary Alan 1234567 alan@deemo.com 2019-04-01	Food & Beverage Peter 1234567 peter/@demo.com 2020-05-02 Image: Comparison of the co	Food & Beverage Peter 1234567 peter@demo.com 2020-09-02 Image: peter@demo.com 2020-09-02 Image: peter@demo.com peter@demo.com 2020-09-02 Image: peter@demo.com peter@demo.co

IX. Create Access Limit Table Type Index Lookup

- 1. Open the Index Lookup window.
- 2. Fill in the information with selecting "Access Limit Table" in "Type" field on the top row, select a document profile for selecting table.
- 3. Click the add button $\textcircled{\bullet}$ on the first column to add the new index lookup.
- 4. Click the items button is of the new created index lookup.
- 5. Items window will appear.
- 6. Fill in the information on the top row in the window.
- 7. After filled in the information, click the add button 🕒 at the first column to add an item.

I. Sequence

I. Create New Sequence

- 1. Click the icon ⁽²⁾ 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" > "Document Framework" > "Sequence".

3. Sequence window will appear.

Sequence								
۲		Company	Name	Digit	Max	Base	Reset	Current Value
	Ð							
1	1	Company	Doc. No.	8	99999999	10	Never	1698
1	Û	Company	Employee Profile Ref. No.	4	9999	10	Never	55
ß	Û	Company	Supplier Ref. No.	5	99999	10	Never	66

Field	Description
Company	Assign Company for the document profile.
Name	Display name of the Sequence.
Digit	Digit of the sequence, for examples 3 digits = 001, 002, 003 5 digits = 00001, 00002, 00003
Max	Maximum running number can reach, for examples 9999 = 0001, 0002, 0003 9999 1500 = 0001, 0002, 0003 1500 Once when the maximum number is reached, it will roll back to 0001.
Base	Either 10 or 16 (Hex). For base of 16, the running number will be: 001,002,003,004,005,006,007,008,009,00A,00B,00C,00D,00E,00F,010,011
Reset	Reset the value per daily, monthly, yearly or never reset. For Daily, Monthly or Yearly, it is recommended to work with [An.Year], [An.Month] etc
Current Value	Display the current value, which cannot be alerted.

4. Click the Save button to commit changes.

II. Modify Existing Sequence

- 1. Open the Sequence window.
- 2. Click the value which is required to change.

Sequence										
×		Company	Name	Digit	Max	Base	Reset	Current Value		
۲										
1	Û	Company	Doc. No.	8	99999999	10	Never	1698		
1	۵	Company	Employee Profile Ref. No.	4	9999	10	Never	55		
1	1	Company	Supplier Ref. No.	5	99999	10	Never	66		
13	۵	Company	Sample No.	4	9999	16	Never			

- 3. After modifying the information. The save button ¹⁰ on the left-hand side will be available.
- 4. Click the Save button to commit changes.

III. Delete Existing Sequence

- 1. Open Sequence window.
- 2. Select the existing sequence which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

J. Rule

I. Create New Rule

- 1. Click the icon $^{\textcircled{0}}$ 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" > "Document Framework" > "Rule".
- 3. Rule window will appear.

Rule	e						
+				Company	Name	Target Type	Pattern
		۲					
	1	Û	(1)	Company	Doc. No.	All Items	DC-[Doc. No.]
	8	۵	(1)	Company	Employee Profile Ref. No.	All Items	EP-[Employee Profile Ref. No.]
	1		١	Company	OA No.	All Items	OA-[An.Year.2Digit]-[OANO]
	1	Ô	(1)	Company	Project Log Ref No. Rule	Document Only	LOG-[Project Log Ref No.]
	1	۵	١	Company	Sample No.	All Items	SM-[An.Year]-[An.Month.2Digit]-[Sample No.]
			(1)	Company	Supplier Ref. No.	All Items	SUP-[Supplier Ref. No.]

Field	Description
Company	Assign Company for the document profile.
Name	Display name of the Rule.
Target Type	Rule of target type.
Pattern	Display pattern of the rule.

The following are all syntax can be used in Pattern:

Syntax	Description	Sample
[An.Year]	Display the current year	LOG-[An.Year]-[Sample No.] LOG-2024-0001, LOG-2024-0002
[An.Year.2Digit]	Display the current year in two digits	LOG-[An.Year.2Digit]-[Sample No.] LOG-24-0001, LOG-24-0002
[An.Month]	Display the current month	LOG/[An.Month]/[Sample No.] LOG/09/0001, LOG/09/0002
[An.Day]	Display the current day	LOG-[An.Day]-[Sample No.]
[An.Hour]	Display the current hour in 24 hours format	LOG-[An.Hour]-[Sample No.]

4. Click the Save button to commit changes.

5. The following example is the effect of applying sequence to an index field:

			File Name	Size	Version	Version Date	Version By	Sequence	Area
습	PCP	•	INV24001.pdf	156 KB	1.0	2024-09-12 17:13:06	Jennifer Tam	SM/2024/0027	Hong Kong Island
	PG#	-	INV24002.pdf	140 KB	1.0	2024-09-12 17:13:07	Jennifer Tam	SM/2024/0028	Hong Kong Island
☆	PCF	•	INV24003.pdf	140 KB	1.0	2024-09-12 17:13:06	Jennifer Tam	SM/2024/0026	Kowloon
☆	Par	-	INV24004.pdf	139 KB	1.0	2024-09-12 17:13:07	Jennifer Tam	SM/2024/0029	Hong Kong Island
	PER	•	INV24005.pdf	139 KB	1.0	2024-09-12 17:13:08	Jennifer Tam	SM/2024/0030	Hong Kong Island
☆	PCP		INV24006.pdf	139 KB	1.0	2024-09-12 17:13:08	Jennifer Tam	SM/2024/0032	New Territories
	PER	•	INV24007.pdf	140 KB	1.0	2024-09-12 17:13:09	Jennifer Tam	SM/2024/0031	New Territories
☆		•	INV24008.pdf	139 KB	1.0	2024-09-12 17:13:10	Jennifer Tam	SM/2024/0034	Island

II. Rule Details

1. There are some cases that both document and index (e.g. CSV) are uploaded to the folder repository from other applications directly. In case you want to have difference sequence number with different criteria, you can use Rule Details to configure. The following is an example:

Area	Sequence Number					
Hong Kong Island	HK/2024/0001, HK/2024/0002					
Kowloon	KLN/2024/0001, KLN/2024/0002					
New Territories	NT/2024/0001, NT/2024/0002					
Island	ILN/2024/0001, ILN/2024/0001					

2. Click the information icon from the Rule window.

Rule						
F			Company	Name	Target Type	Pattern
	۲					
10	1	(1)	Company	Doc. No.	All Items	DC-[Doc. No.]
13	Û	١	Company	Employee Profile Ref. No.	All Items	EP-[Employee Profile Ref. No.]
	۵	(1)	Company	OA No.	All Items	OA-[An.Year.2Digit]-[OANO]
	Û	(1)	Company	Project Log Ref No. Rule	Document Only	LOG-[Project Log Ref No.]
13	1	(Company	Sample No.	All Items	SM-[An.Year]-[An.Month.2Digit]-[Sample No.]
		(1)	Company	Supplier Ref. No.	All Items	SUP-[Supplier Ref. No.]

3. Set the rule details as follow. The sequence pattern will change according to different Area.

R	ule Deta	ils						×
			Field Name 2	Match Value 1	Conditio: Field Name 2	Match Value 2	Pattern	
	Œ							
	6	⑪	Area	Island	and		ILN/[An.Year]/[Sample No.]	
	8	⑪	Area	New Territories	and		NT/[An.Year]/[Sample No.]	
	6	⑪	Area	Kowloon	and		KLN/[An.Year]/[Sample No.]	
	Fo.	⑪	Area	Hong Kong Island	and		HK/[An.Year]/[Sample No.]	

III. Modify Existing Rule

- 1. Open the Rule window.
- 2. Click the value which is required to change.
- 3. After modify the information. The save button 🛅 on the left-hand side will be available.
- 4. Click save button ⁽¹⁾ to commit changes.

IV. Delete Existing Rule

- 1. Open Rule window.
- 2. Select the existing rule which is required to delete.
- 3. Click the delete icon $\overline{\textcircled{1}}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

K. Permission Level

I. Background

Every single document, folder and template would have different permission level for user who required to access and manage. Permission Level can be control on different uses like Read, Write, Delete, Print, Export, Modify and Create on Document, Folder and Template.

One document, folder or template can have more than one permission for the same user or user group.

For example, User A have been assigned two permission level which is "No Access" and "Read Write" permission into the same folder. Then User A would have no access for that folder because of the permission level will take the least effect.

II. Create New Permission Level

- 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" > "Administrative" > "Permission Level".

3. Permission Level window will appear.

Permissio	Permission Level												e ×	
×			Company	Name	Read	Preview	Modify	Delete Own	Delete	Move	Print	Export	Index	Create Document
	۲													
100	0	ø	Company	Access Deny	•									
10	0	ø	Company	Full Access	0	0	0	0	0	0	0	0	0	0
0	ß	ø	Company	Modify	0	0	0	0			0	0	0	0
10	8	ø	Company	Non-Manage Access	0	0	0	0	0	0	0	0	0	0
10	8	Ø	Company	Read Only	0	0						0		
(6)	8	ø	Company	Share	0	0	0	0			0	0	0	0

4. Fill in the information on the top row.

Field	Description
Company	The default document profile of the root folder.
Name	Display name of the permission level.
Read	Enable to read document, folder and template.
Preview	Enable to preview document, folder and template.
Modify	Enable to modify the detail and index of document, folder and template.
Delete Own	Enable to delete the document, folder and template create by itself.
Delete	Enable to delete the document, folder and template.
Print	Enable to print.
Export	Enable to export the document and template.
Index	Enable to change the index of the document.
Create Document	Enable to create document.
Publish	Enable to publish the document which is minor version.
View Document History	Enable to view document history.
View Version History	Enable to view version of the document history.
Purge Version	Enable to purge version in document version history
Restore Version	Enable to Restore the old document version in version history.
Create Folder	Enable to create folder.
Delete Folder	Enable to delete folder.
Temporary Permission	Enable to assign temporary permission.
View Workflow History	Enable to view the workflow history of the document.
Manage Workflow	Enable to manage workflow of the document.
Share To	Enable to share the document to external or internal during Outlook.
Comment	Enable to create comment to the document.

5. Click the Add button to save your changes.

III. Permission Level Matrix

The following table is all permission level verses functions.

Functions	Read	Preview	Modify	Delete Own	Delete	Move	Create Document	Print
List Document	•							
Add to My Clipboard	•							
Route Document	•							
Mark as Favourite	•							
Preview Document		•						
Relation – Copy Link		•						
Relation – Link Relations		•						
Mark Final Version			•					
Check-Out and Edit			•					
Check-Out and Download			•					
Check-Out			•					
Upload Thumbnail			•					
Reminder			•					
Major Versions:				•				
Ver. 1 as Owner can								
Delete/Cut Document"								
Minor Versions:				•				
Ver. 0 as Owner can								
Delete/Cut Document								
Ver 1 as Owner can					•			
Delete/Cut Document"								
Minor Versions:					•			
> Ver. 0 as Owner can								
Delete/Cut Document"								
Move Document						•		•
Required Move + Create								
Bedaction							-	
Brint from Document					•		-	-
Viewer								

Functions	Export	Index	Create Document	Publish	View Doc History	View Ver History	Create Folder
New Calendar			•				
New URL			•				
New Project			•				
New Document Template			•				
Upload Document			•				
Add Attachments			•				
Download Document	•						
Text Compare	•						
Edit Index		•					
Export Index List		•					
Import Index List		•					
Copy Folder: Required Creation Document + Create Folder			•				
Copy Document	•						
Copy & Paste Document to Folder			•				
Copy & Paste Document Index Only		•					
Copy & Paste Document Virtual Link	•						
Publish Minor Version of Documents				•			
View Document Version History						•	•
View Document Properties						•	•
View Document Audit Log					•		

Functions	Purge Version	Restore Version	Create Folder	Delete Folder	Temporary Permission	Follow	Manage
Delete Old Version of	•						
Document							
Restore Old Version of		•					
Document as Latest Version							
Create Folder			•				
Create Folder Tree from CSV			•				
Delete Folder				•			
Temporary Permission					•		
Follow (Subscription)						•	
Edit Folder Profile			•				
Folder Permission							•

IV. Modify Existing Permission Level

- 1. Open the permission level window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹ on the left-hand side will be available.
- 4. Click save button 🛅 to commit changes.

V. Delete Existing Permission Level

- 1. Open Permission Level window.
- 2. Select the existing permission level which is required to delete.
- 3. Click the delete icon $\overline{\amalg}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

VI. Copy Existing Permission Level

- 1. Open Permission Level window.
- 2. Looking for the existing permission level which is required to copy.
- 3. Click the copy button to copy the permission for create a new permission level.
- 4. The same permission with copied permission level will display on the top row.
- 5. Fill in the Company and Name field.
- 6. Click the Add button to save your changes.

L. Quota Schema

I. Background

Quota Schema defines the quota control settings. Quota schema can assign to user accounts, folders and root folders. If it assigns to a folder, the effective control is over the folder and all children. The quota is counting start from the time when schema have been assigned, and thus all historical will not count for control by the schema.

Quota schema would be taking the least effect. For example, that User A have been assigned 1GB quota, Root Folder have been assigned 50 MB, the Folder A which is under the root folder have been assign 5KB. Then User A required to upload a word file about 22KB in folder "Root Folder > Folder A", system will display error about not enough quota because of quota schema will take the least effect.

II. Create New Quota Schema

- 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" > "Administrative" > "Quota Schema".

3. Quota Schema window will appear.

Q	Quota Schema									
ſ	Þ			Company	Name	Total Size Limit in KB	Total no. of Ver. Limit	Reset Every Month	Reset Every Year	Priority
		۲						•	•	
	1	Ô	(Company	Limit to 100Mb File Size	1000		•	•	
	(1)	Û	(Company	Not allow Video Files	0		•	•	
	(B)	Û	0	Company	PF Quota			•	•	

4. Fill in the information on the top row.

Quota S	Quota Schema									
×			Company	Name	Total Size Limit in KB	Total no. of Ver. Limit	Reset Every Month	Reset Every Year	Priority	
	€			Maximum 10 Versions		10	•	•		
120	1	(Company	Limit to 100Mb File Size	1000		•	•		
60	۵	(Company	Not allow Video Files	0		•	•		
60	Ô	(1)	Company	Sample	0		•	•		

Field	Description
Company	The default document profile of the root folder.
Name	Display name of the quota schema.
Total Size Limit in KB	Total limited document size of the quota schema.
Total no. of Ver. Limit	Total limited numbers of uploading document of the quota schema.
Reset Every Month	Enable to reset the quota per month.
Reset Every Year	Enable to reset the quota per year.
Priority	Enable to delete the document, folder and template.

5. Click the Add button to save your changes.

III. Modify Existing Quota Schema

- 1. Open the Quota Schema window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button on the left-hand side will be available.
- 4. Click save button 🖻 to commit changes.

IV. Delete Existing Quota Schema

- 1. Open the Quota Schema window.
- 2. Select the existing quota schema which is required to delete.
- 3. Click the delete icon $\overline{\textcircled{1}}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

V. Applying Quota Schema

Quota Schema Rule is the quota schema including file extension for managing the upload action of user. For example, administrator wants to limit user group "HRD" to upload each excel file cannot large than 1MB. All administrator needs to do that is create a quota schema including quota schema rules and assign the quota schema to "HRD" user group.

- 1. Open the Quota Schema window.
- 2. Looking for the existing quota schema record which is required to apply quota schema rules.
- 3. Click the rules button \bigcirc .
- 4. Rules window will appear.
- 5. Fill in the information on the top row.

Rules	ules 🗱							
		File Extension	Size Limit per File in KB					
6	Ð							
6	Ŵ	.mov	0					
Ð	⑪	.mp4	0					
6	Ŵ	.mpg	0					
5	⑪	.avi	0					

Field	Description		
File Extension	File type of the limited document.		
Size Limit per File in KB	Assign the limit size of the file extension.		

6. Click the Add button to save your changes.

M. Search Mapping

I. Create New Search Mapping

- 1. Click the icon ⁽²⁾ 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" > "Administrative" > "Search Mapping".

3. The Search Mapping window will appear.



4. Fill in the information on the top row.

		Keyword	Alias
÷	Ð		
6	۵	SG	Singapore
6	۵	НК	Hong Kong
6	Û	AI	Artificial Intelligence
8	۵	MS	Microsoft

Field	Description
Keyword	The keyword which has alias during searching.
Alias	The corresponding alias to look for during searching. Please note that this is one way, that means you can search the alias as well when you search using the keyword but not vice versa.

5. Click the Add button to save your changes

II. Modify Existing Search Mapping

- 1. Open the Search Mapping window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹ on the left-hand side will be available.
- 4. Click save button 🛅 to commit changes.

III. Delete Existing Search Mapping

- 1. Open the Search Mapping window.
- 2. Looking for the existing search mapping row which is required to delete.
- 3. Click the delete icon $\overline{\blacksquare}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

IV. Import Search Mapping

- 1. Open the Search Mapping window.
- 2. Click the import button
- 3. The Import Search Mapping window will appear.

Import Search Mapping	Upload	×	
Select file	Choose File No file chosen		
. Language	UTF-8	~	
Sample Files	Download Sample		

4. Click hyperlink "Download Sample" to download the sample of the import file.

- 5. Click "Choose File" button to select the modified import file.
- 6. Click "Upload" button to import the search mapping.
- 7. The search mapping will be overwriting from the import file.

Note:

From the search mapping, the import action will overwrite everything from the import file, please save an import file for records before import.

N. All Shared Link to Guest

I. Background

All Shared Links to External is a table of all document which is already shared to external. System support administrator to manage and control all shared document links.

II. Edit Existing Shared Link

- 1. Click the icon [®] with the login name in right top corner from the top bar from bring up the context menu.
- From the context menu, select "Settings" > "Administrative" > "All Shared Links to External".

My Shared Links to External							
Þ.	File Name	Folder Path	Shared Version	Link Created On Set Passwo	ord Period Fron		
Û	A210141-Antelope 5 Administration Guide.docx	Home\Marketing\Product Launch	1.0	2021-01-27 📀			
١	Antelope.dwg	Home\Marketing\Product Launch	1.0	2021-01-27 📀			
Û	Sample Agreements.docx	Home\Marketing\Product Launch	5.0	2021-01-27 📀			

- 3. Looking for the shared link which is required to edit.
- 4. Click the edit button \square on the first column beside the selected shared link.
- 5. The External window will appear.
- 6. All information would be optional to edit.

Field	Description
Password	Set the password for the shared link, the user requires to input password
	when open the shared link.
Link Valid	The valid date of the shared link. The shared link will display that the link is
	unavailable when the user open the shared link at the invalid dates.
File Link	The file link will generate automatically after click the "Generate Link & Send"
	button.

- 7. After modifying the information, click "Generate Link & Send" button to generate the shared link.
- 8. The shared link will be generated.
- 9. Outlook will create a new email including the shared link.

III. Delete Existing Shared Link

- 1. Open the "All Shared Links to External" window.
- 2. Looking for the existing shared link which is required to delete.
- 3. Click the delete icon $\overline{\blacksquare}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

O. Mobile Access Control

I. Background

Mobile Access Control is a list for managing the access control from the mobile device. System support administrator to manage the mobile access control by using the device id. From the device id, administrator can enable or disable the device which can access the Antelope 6.

II. Create New MAC

- 1. Click the icon ⁽²⁾ 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" > "Administrative" > "Mobile Access Control".

3. The Mobile Access Control window will appear.

Mobile Access Control								
۱.		File Name	Description	Device Id	Allow Access			
\oplus					0			
8	Ŵ	Anyone		*	0			
	_							

4. Fill in the information on the top row.

e Name Descriptio	n Device Id	Allow Access
D HRD Devic	e ID 01 HRD-P001	0
yone	×.	ø
	• Name Descriptio	Name Description Device Id D HRD Device ID 01 HRD-P001 yone *

Field	Description
File Name	Display name of the access name.
Description	The description of the access.
Device Id	The mobile device Id of the access. If select anyone, input *.
Allow Access	Enable or Disable the device to access.

5. Click the Add button to save your changes.

III. Modify Existing MAC

- 1. Open the Mobile Access Control window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹⁰ on the left-hand side will be available.
- 4. Click save button ¹ to commit changes.

IV. Delete Existing MAC

- 1. Open the Mobile Access Control window.
- 2. Looking for the existing access row which is required to delete.
- 3. Click the delete icon $\overline{\amalg}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

V. Where to Check DeviceID on iOS?

- 1. Go to Settings > General and tap "About".
- 2. Look for the serial number. You might need to scroll down to find the IMEI/MEID, and ICCID.

VI. Where to Check DeviceID on Android OS?

- 1. Download an application named "Device ID" that will quickly reveal the ID of the Android Device to user.
- 2. Open the application, the device id will display at "Android Device ID" column.

P. Workflow Delegation

I. Background

Workflow Delegation is a table of all the workflow delegation from user. System support administrator to manage all the user workflow delegation in Workflow Delegation window.

II. Create New Workflow Delegation

- 1. Click the icon ⁽²⁾ 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" > "Administrative" > "Workflow Delegation".

3. Workflow Delegation window will appear.

My Workflow Delegation						
	×		Workflow	From Date	To Date	Delegated Person
	€		Leave Application.rwt	2024-09-14 01:06:00	2024-09-23 01:06:00	Jennifer Tam
	6	Û	Expenses Claims.rwt	2024-09-14 01:06:00	2024-09-30 01:06:00	Alice Chan

4. Fill in the information to create a new delegation.

Field	Description
Username	Select user which require the delegation.
Workflow	Select the workflow which is required for the delegation.
From Date	When the delegation start from.
To Date	When the delegation will unavailable.
Acting	Select the user to delegate.

5. Click the Add button to save your changes.

III. Modify Existing Workflow Delegation

- 1. Open the Workflow Delegation window.
- 2. Click the value which is required to change.
- 3. After modifying the information. The save button ¹⁰ on the left-hand side will be available.
- 4. Click save button ¹ to commit changes.

IV. Delete Existing Workflow Delegation

- 1. Open the Workflow Delegation window.
- 2. Looking for the existing workflow delegation row which is required to delete.
- 3. Click the delete icon $\overline{\square}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

Q. License Information

I. Background

License Information is the list of information of the Antelope 6 license. System support administrator to check the information of the license like the license issue date, expiry date, number of concurrent users, number of named user, enabled module, version and certificate id.

II. Field Description

- 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" > "Administrative" > "License Information".

3. License Information window will appear.

License Information	x
Issue Date	2020-03-13
Expiry Date	2099-06-13
Number of Concurrent User	300
Number of Named User	5 (5 named user is reserved for system users)
Enabled Module	Core, Routing, Server Print, Mobility, Workflow & EForm, Cloud Sync, Collaborative Editor
Version	4.9.2.11
Certificate ID	

Information Name	Description
Issue Date	License issue date.
Expiry Date	License expiry date.
Number of Concurrent User	Limit number of user login at the same time
Number of Named User	Limit number of user login all the time.
Enabled Module	All of the enabled module name.
Version	Antelope 6 Server version.
Certificate ID	Certificate ID of Antelope 6.

R. Report

I. Background

System support administrator to generate different type report as excel or pdf file for checking and managing the Antelope 6 system more effective. Different type of report would be more focus on select user, user group or folder.

Report Name	Description
Access Right Approval	Generate report about access right approval of selected
Report	information.
	Required :
	Select Folder(s)
	Select Document
	Project Code
	Select Department(s)
	Select Team(s)
	Select User(s)
Disposal List Report	Generate a list including disposal document during selected period.
	Required :
	From (Date)
	To (Date)
Document and Folder List	Generate a list of document, version history of document and
Report	folder in the selected folder.
	Required :
	Folder level
	Select Folder(s)
Document Owner Report	Generate a list of all the document is own by selected user.
	Required :
	Select User(s)
Exception Report	Generate a report including which user have triggered the different
	type of exception.
	Required:
	High volume of download (>100 documents per hour)
	High volume of delete (>100 documents per hour)
	High volume of access/read/preview (>100 documents per hour)
	High volume of sharing to external link (>10 documents per day)
	High volume of checkout activities (>50 documents per day)
	High volume of upload activities (>1G each per day)
Failed Activities Log	Generate a report including the log which action have triggered the
Report	failed activities.
	Required :
	Select Department(s)
	Select Team(s)
	Select User(s)
	From (Date)
	To (Date)
Folder Permission Report	Generate a list of permission of selected folder.
	Required :
	Folder level

	Select Folder(s)
Group Member Report	Generate a list of select group(s), department(s), team(s) or user(s).
tram	Required :
	Select Group(s)
	Select Department(s)
	Select Team(s)
	Select User(s)
Incoming Document	Searching all incoming document details registries by workflow
Registration Report	"Incoming Document Registration" with selected department(s) or
	team(s)
	Required :
	Select Department(s)
	Select Team(s)
	From (Date)
	To (Date)
Incoming Document	Searching all incoming document status registries by workflow
Status Report	"Incoming Document Registration" with select department(s) or
·	team(s).
	Required :
	Select Department(s)
	Select Team(s)
	From (Date)
	To (Date)
Index Usage Report	The usage report about index of selected department(s) and
	team(s).
	Required :
	Select Department(s)
	Select Team(s)
	From (Date)
	To (Date)
Large File Size Document	Checking the document and document details which is large than
Report	inputted size.
	Required :
	Folder level
	From (Date)
	To (Date)
	File Size (MB)
Large Version Document	Checking the document and document details which document
Report	version is large than inputted version.
	Required :
	Folder level
	From (Date)
	To (Date)
	Number of Version
Outstanding Tasks Report	Ability to generate periodic reminders and report on outstanding
	tasks of selected user.
	Required :
	Select User(s)
Receipt	Searching all incoming document details registries of the workflow
Acknowledgement of	process by workflow "Incoming Document Registration" with
	selected period.

Incoming Document	Required :
Report	From (Date)
	To (Date)
Temporary Permission	Generating a report including all the temporary report of the
Report	selected department(s), teams(s) or user(s).
	Required :
	Select Department(s)
	Select Team(s)
	Select User(s)
Usage Report	Generating a usage report of selected department(s), teams(s) or
	user(s), during the specified period.
	Required :
	Select Department(s)
	Select Team(s)
	Select User(s)
	From (Date)
	To (Date)
User Folder Permission	Ability to generate the user permission list of the selected folder(s)
Report	and the permission list of selected department(s). Team(s)
	Required :
	Folder level
	Select Folder(s)
	Select Denartment(s)
	Select Team(s)
	Select User(s)
User Group and Eupction	Ability to generate the details registry list including user permission
Report	of the selected user group(s) department(s) team(s) and user(s)
	Required :
	Select Group(s)
	Select Department(s)
	Select Team(s)
	Select User(s)
Version History Report	Ability to generate a list of all the document with the document
version mistory hepore	history in the selected folder(s) during the selected period
	Required :
	Folder level
	Select Folder(s)
	From (Date)
	To (Date)
Workflow Usage Report	Ability to generate a workflow usage report of all the workflow
Workhow obage Report	usage of the selected denartment(s) and team(s) during the
	selected period
	Required :
	Select Department(s)
	Select Team(s)
	From (Date)
	To (Date)
Contract Expiry Report	Ability to generate expire contract document list of the selected
	folder(s) with the selected department(s) and team(s) during the
	specified period.
	Required :
	nequieu.

Select Folder(s)
Select Department(s)
Select Team(s)
From (Date)
To (Date)

II. Operation

- 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 "Reports".
- 3. The "Reports" window will appear.

Reports		Generate	×
Report type	Access Right Approval Report		
Project Code	•		
Select Div./Dept.(s)	·		
Select Team(s)	· · · · · · · · · · · · · · · · · · ·		
Select Folder(s)	Home		
Select Document			
Select User(s)			
Document Type	EXCEL •		

- 4. Click the drop-down list of the "Report type" field to select different report.
- 5. The field will be change by different report.
- 6. After select the report type and fill in the information.
- 7. Select "Document Type" to define the report file format.
- 8. Click "Generate" button.
- 9. The report file will be download automatically.

III. Report Permission Control

- 1. Click the icon $^{\textcircled{0}}$ 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" > "Administrative" > "Report Permission".
- 3. Report Permission window will appear.

Report Permission		×	
		Report Name	
	200	Workflow Usage Report	*
	300	Version History Report	
	200	User Group and Function Report	

- 4. Looking for the report which is required to assign.
- 5. Click the User group and Functional level button 🕮 .
- 6. User Group and Functional Level window will appear.

User G	Group and Functional Level					
	Group Name	Functional Name				
•						
Û	\$Administrators					

7. Fill the information of the top row.

User Group and Functional Level						
		Group Name	Functional Name			
	\oplus	HRD - Sync with lookup User Div / Dept Table				
Ĩ	Û	\$Administrators				

Field	Description					
Group Name	Selection of user group.					
Functional Name	Selection of functional level.					

8. Click the Add button to save your changes.

S. System Audit Log

I. Background

System records information of user actions from administrative action to document and user access. System support administrator to check the audit log from the audit log section, a query to find the target of required, and export the result into excel file.

II. Search Audit Log

- 1. Click the icon ⁽²⁾ 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" > "System Audit Log".

3. System Audit Log window will appear.

Syster	n Audit Log					
>	Log type	Log Date	Owner	Authorized	IP address	Target
	Login Success	2020-08-06 01:08:06	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:08:04	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:06:05	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:06:05	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:04:05	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:04:05	idoloperator		192.168.1.1	User : idoloperator
	Login Success	2020-08-06 01:02:05	idoloperator		192.168.1.1	User : idoloperator

4. Click the ">" button of the left panel.

5. The search panel will appear at the left side.

Search	Search	Clear	Export	Export All	Excel	¥	*	Log type	Log Date	Owner	Authorized	IP address	Target
Fieldna	me		Criteria					Login Success	2020-08-06 01:12:05	idoloperator		192.168.1.1	User : Idoloperato
Year		equal	2020			and		Login Success	2020-08-06 01:12:04	idoloperator		192.168.1.1	User : idoloperato
Log typ	e	equal				and		Login Success	2020-08-06 01:10:05	idoloperator		192.168.1.1	User : idoloperato
Log Da	le	greater or equ	al			and		Login Success	2020-08-06 01:10:05	idoloperator		192.168.1.1	User : idoloperato
Log Da	te	less or equal				and		Login Success	2020-08-06 01:08:06	idoloperator		192.168.1.1	User : idoloperato
Owner		contain				and		Login Success	2020-08-06 01:08:04	idoloperator		192.168.1.1	User : idoloperato
Author	zed	contain				and		Login Success	2020-08-06 01:06:05	idoloperator		192.168.1.1	User : idoloperato
IP addr	ess	contain				and		Login Success	2020-08-06 01:06:05	idoloperator		192.168.1.1	User : idoloperato
Target		contain				and		Login Success	2020-08-06 01:04:05	Idoloperator		192.168.1.1	User : Idoloperato
Origina	Value	contain				and		Login Success	2020-08-06 01:04:05	idoloperator		192.168.1.1	User : idoloperato
New Va	lue	contain				and		Login Success	2020-08-06 01:02:05	idoloperator		192.168.1.1	User : idoloperato

- 6. Fill in the search information in the Criteria field.
- 7. Click the "Search" button for searching.
I. Export Audit Log

- 1. Open the System Audit Log window.
- 2. Open the search panel and search the require information.
- 3. After search the result.
- 4. From the search panel, click the "Export" button.
- 5. The search result of audit log will be generated to excel file and downloaded.

T. Backend Operation

I. Background

When an operation affects too many records in the database, the system will automatically schedule it for the end of the day and create backend operation records. Administrators can assign access rights to user groups, allowing them to change parameters if they own the operation or cancel it by removing it.

The backend operations include clearing the recycle bin. This operation is set up during the system installation and automatically deletes documents in the recycle bin 30 days after they are deleted.

II. Create New Backend Operation

- 1. Click the icon ⁽²⁾ 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" > "Backend Operation".
- 3. Backend Operation window will appear.

Backend O	peration								2	×
F	Created Date	Туре	Description	Owner	Start Time	Recurrance	Interval	Error Message	Target II	2
۲						0				
10 🛍	2020-09-05	Clear Trash		admin	2021-01-29 23:00:00	0	24.00		365	

- 4. Click the Add button to save your changes.
- 5. The New window will appear.

New		Save	×
Туре	Clear Recycle Bin	•	
Start Time	23:00:00		
Interval in hour	24		
Recurrance			
Clear after days	30		
Custom Action	CheckOutDocMonitor		

6. Fill in the information for the operation setting.

Field	Description
Туре	Type of default operation.
Start Time	Start time of the operation.
Interval In hour	Interval of the operation in hour,
Recurrence	Enable system to recurrence the operation.
Clear after days	For the "Clear Recycle Bin" operation. System will remove document in recycle bin after inputted days since the date of delete action.
Custom Action	To custom some action during the operation is start. The default custom action would have check out document monitor, send a final version email, start core project document status, schedule the document retention with disposal and generate a usage report.

7. Click the Save button to save your changes.

III. Modify Existing Backend Operation

- 1. Open the Backend Operation window.
- 2. Click the value which is required to change.

Field	Description	Modify
Created Date	Created date of the operation.	Cannot modify.
Туре	Type of the operation.	Cannot modify.
Description	Description of the operation.	Cannot modify.
Owner	Owner username of the operation.	Cannot modify.
Start Time	The start time of next operation.	Can modify.
Recurrence	Enable system to recurrence the operation.	Can modify.
Interval	Interval time for the operation.	Can modify.
Error Message	Error message of the process during the operation.	Cannot modify.
Target ID	The target id of the operation. Different type of operation will have different target id.	Can modify.

- 3. After modifying the information. The save button **b** on the left-hand side will be available.
- 4. Click save button 🕒 to commit changes.

IV. Delete Existing Backend Operation

- 1. Open the Backend Operation window.
- 2. Looking for the existing operation which is required to delete.
- 3. Click the delete icon $\overline{\blacksquare}$ on the second column.
- 4. A confirmation message "Are you sure?" will appear.
- 5. Click "OK" button to confirm deleting.

U. Session Management

I. Background

When a user account login into system, the web server will create a new session. You can manage the current sessions from the Session Management.

II. Remove a User Session

1. To remove a user session, select Administrative > Session Management from setup menu.



2. This will display all login sessions on the web server.

Session	Management					(3)	×
•	Username	Display Name	Team	IP address	Last Access Time	Channel	
Û	dsoperator	Document Service Account		EC2AMAZ-JM0AK93	2024-09-13 11:29:59	System	
Û	idxoperator	Indexing Service Account		EC2AMAZ-JM0AK93	2024-09-13 11:29:31	System	
	jennifer	Jennifer Tam		172.31.45.186	2024-09-13 11:29:34	Web	
Û	osoperator	Operation Service		EC2AMAZ-JM0AK93	2024-09-13 11:28:40	System	
⑪	wfoperator	Antelope Workflow		EC2AMAZ-JM0AK93	2024-09-13 11:29:52	System	

3. To remove a login session, click the recycle bin icon. You cannot remove your own session.

V. All Reminder Records

I. Background

Users can set document reminder. As a system administrator, you can take control on all reminder records.

II. Remove a Reminder Record

1. To remove a reminder record, select Administrative > All Reminder Record.



2. All Reminder Record window will appear. Click the recycle bin to remove any reminder record.

a.	All Reminder Record								
	F		File Name	Folder Path	Initiator	Follow-up Party			
	10	Û	Antelope 6 Case Sharing - ABC.pptx	Home\Case Sharing	Wing	Daisy Leung;Mia A.			
	8	Û	Residential Rentral Contract - Alice Chen.pdf	Home\Accounting\Agreement	Jennifer Tam	Alice Chan			

W. Web Part Management

I. Background

You can create a specific web part such as:

- A specific Inbox or Outbox for a workflow.
- A bar chart, line chart, pipe chart for data analysing

II. Create New Web Part – Workflow Inbox

1. To create a new Web Part, select Administrative > Web Part Management.

Permission Level			~
Quota Schema			My Account
Search Mapping			
Trust Server Management		-	My Shared Links to Guest
Session Management			My Reminder Record
All Shared Links to External			My Workflow Delegation
All Reminder Record			Change Column View
Mobile Access Control	Preferences		
Holiday Management	User and Group	Þ	Settings 🔹 🕨
All Workflow Delegation	Document Framework	Þ	Reports
Web Part Management	Administrative	•	Logout
Default Column Position	All Workflow Processing Task(s)		
Report Permission	System Audit Log		
Watermark			
License Information			

2. The Web Part Management is created, click the Add icon.

Web	Veb Part Management								
×				File Name	Туре				
		\oplus							
	Û	200	(i)	ChartBar Expenses Claim by Category.xml	ChartBar				
	Û	绺	١	ChartLine Total Expenses Claims for the Past 4 Months.xml	ChartLine				
	۵	绺	١	ChartPie Expenses Claim by Months.xml	ChartPie				
	Û	200	(i)	Inbox Expenses Claim Approval.xml	Inbox				

- 3. The new web part window appears. From the Web Part Type, select Inbox.
- 4. Input the Web Part Title, for example "Petty Cash Approval (Small Amount)".
- 5. Select a workflow template, for example "Process: Petty Cash.rwt".

Aud				Cre	eate	
Web Part Type	Inbox					~
Web Part Title	Petty Cash Approva	l (Small A	mount)			
Workflow Template	Process:Petty Cash.	rwt				~
Select Additional Field	Apply Date					~
	Add					
Selected Fields						
	Delete					
Criteria #1	Delete Apply Date	= ~	dd/mm/yyyy		AND	~
Criteria #1 Criteria #2	Delete Apply Date ~ Apply Date ~	= ~	dd/mm/yyyy dd/mm/yyyy	0	AND	~
Criteria #1 Criteria #2 Criteria #3	Delete Apply Date ~ Apply Date ~ Apply Date ~	= ~	dd/mm/yyyy dd/mm/yyyy dd/mm/yyyy		AND AND AND	~
Criteria #1 Criteria #2 Criteria #3 Sorting #1	Delete Apply Date ~ Apply Date ~ Apply Date ~ Apply Date		dd/mm/yyyy dd/mm/yyyy dd/mm/yyyy ASC		AND AND AND	~ ~
Criteria #1 Criteria #2 Criteria #3 Sorting #1 Sorting #2	Delete Apply Date ~ Apply Date ~ Apply Date ~ Apply Date Apply Date		dd/mm/yyyy dd/mm/yyyy dd/mm/yyyy ASC ASC		AND AND AND	~ ~ ~
Criteria #1 Criteria #2 Criteria #3 Sorting #1 Sorting #2 Sorting #3	Delete Apply Date Apply Date Apply Date Apply Date Apply Date Apply Date		dd/mm/yyyy dd/mm/yyyy dd/mm/yyyy ASC ASC ASC		AND AND AND	

6. From the Select Additional Field, add those index field that you want to appear in your customized web part.

Add		Create	
Web Part Type	Inbox		~
Web Part Title	Petty Cash Approval (Small Amount)		
Workflow Template	Process:Petty Cash.rwt		~
Select Additional Field	Total Amount		~
	Add		
Selected Fields	Apply Date Total Amount		
	Delete		

7. Since this web part is for all small amount petty cash application, we can add a criteria. You can add a maximum of three criteria.

Criteria #1	Total Amount 🗸	<=	*	500		AND	~
Criteria #2	Apply Date ~	=	~	dd/mm/yyyy	۵	AND	~
Criteria #3	Apply Date ~		~	dd/mm/yyyy		AND	~

8. Display the sorting method.

Sorting #1	Apply Date ~	ASC	~
Sorting #2	Apply Date ~	ASC	~
Sorting #3	Apply Date ~	ASC	~

9. The Inbox web part can display your own workflow tasks, or the entire team workflow tasks within the same user group (or user groups which you have involved).

Display Option	My Records	Ŷ
)

10. Other options include:

Status	In-Activate	~
Display Count	Unread	~
Enable Reply		
Enable Reassign		
Enable Update Priority	Image: A start of the start	
Include Pool Task		

Status:

Display Count:	Display total number of inbox tasks or only un-read tasks.
Enable Reply:	Quick reply to the workflow tasks for approval
Enable Reassign:	Allow reassign the approver to other user.
Enable Update Priority:	Update the workflow task priority from Low to Top.
Include Pool Task:	All workflow task can be assigned or pickup by different users.

Web part is in active or in-active mode for users' selection.

III. Create New Web Part – Diagram and Chart

1. To create a new web part for data analysing with charts, select either Bar Chart, Line Chart or Pie Chart from Web Part Type.

Edit			Update	×
	Web Part Type	ChartBar		~
	Web Part Title	Expenses Claim by Category		
	Data Source	Expenses Claim		~
	Select Group By Field	Expenses Category ~		
		~		
	Value Field Title	Total Amount		
	Select Value Field and Method	`		
iount		Sum 🗸		
otal Arr	Selected Fields	Add Sum of Field187		
1				
		Delete		
	Display Top N	10		~
	Status	Activate		~

2. For x-axis label, from the Select Group By Field,

Select Group by Field (x-axis), for example group by Expenses Category (Travel, Stationary, Transportation etc.). If the index field data type is Date, then you can group by either Month or Year.

Select Group By Field	Apply Date	~
	Month ~	

3. Select Value Field and Method (y-axis), you can select by Sum (for the index values are numeric data type) or Count.

Select Value Field and Method	Amount	~
Method	Sum ~	
	Add	

4. Select how many top records to display, and the activate status of the web part.

Display Top N	10	~
Status	Activate	~

IV. Modify Existing Web Part

1. To modify an existing web part, click the information icon.

Ŵ	8°	١	ChartBar Expenses Claim Amount.xml	ChartBar
创	ŝ	<u>ا</u> (Edit artBar Expenses Claim by Category.xml	ChartBar
创	200	١	ChartLine Total Expenses Claims for the Past 4 Months.xml	ChartLine

2. Modify the web part setting, click the Update button to save your changes.

V. Web Part Permission

1. To set permission control on web part, click the access control icon.

⑪	8	(i)	ChartBar Expenses Claim Amount.xml	ChartBar
Ŵ	ں بچر	ser Grou	p and Functional Level ChartBar Expenses Claim by Category.xml	ChartBar
Û	0%	١	ChartLine Total Expenses Claims for the Past 4 Months.xml	ChartLine

2. Assign the user group to the web part.

 File Name 				Type					
	۲			User Grou	ip and Func	tional Level	68	×	
	181	0	Chart8ar Expenses Claim Amount.xml		Group Nar	ne	Functional Name		
	181	٩	ChartBar Expenses Claim by Category xr	۲					
	-81	٥	ChartLine Total Expenses Claims for the		Select G	roup			
	181	0	ChartPie Expenses Claim by Months.xml		Name				
8	181	0	Inbox Expenses Claim Approval.xml			Administration Group			
8	槢	0	Inbox Petty Cash Approval (Small Amou		-	\$Administrators			Select
					1	46 deleting group			Select
					1	Accounting Department Accounting			Select
					1	All Users			Select

X. Default Column Position

I. Background

To confirm the default Document Profile index field display globally, you can do it via Default Column Position. For example, a Document Profile has the following index fields:

- Reference No.
- Apply By
- Apply Date
- Customer Name
- Checksum
- Industry

The index field "Checksum" in this case is a field that used for system integration only, and you want to hide it from user selection or modification. You can do it by configuring via Default Column Position.

II. Setup Default Column

1. From the setup menu, select "Administrative > Default Column Position".

Permission Level	۹		🕆 🛛 🔍
Quota Schema		1	My Account
Search Mapping			ing Account
Trust Server Management			My Shared Links to Guest
Session Management			My Reminder Record
All Shared Links to External			My Workflow Delegation
All Reminder Record			Change Column View
Mobile Access Control	Preferences		
Holiday Management	User and Group	\rightarrow	Settings 🔹 🕨
All Workflow Delegation	Document Framework	¥	Reports
Web Part Management	Administrative	+	Logout
Default Column Position	All Workflow Processing Task(s)		
Report Permission	System Audit Log		
Watermark			
License Information			
Company Information			
Database Connection			
REST API Connection			
Backend Operation			

2. The Default Column Position will appear. Select the Document Profile you want to configure. For example, Customer Survey Form.

Default Column Position			Reset	×
Select a Document Profile or Webpart:				
Document Profile List View - Customer Survey Form				~
Available Columns:		Selected Columns:		
Column Name		Column Name		
		File Name		
		= Size		
		= Version		
		= Version Date		
		= Version By		
		= Hash Tag		
		= Page		
		= Your Name		
	>	= Gender		
	<	= Email		
		= Mobile		
		= Product Interest		
		= Comments		
		= Tell Us Your Feeling		
		= Checksum		

3. Select the field "Checksum" and drag and drop to "Available Columns".

Available Columns:		Selected Columns:
Column Name		Column Name
	File Name	
		= Size
		= Version
		= Version Date
		= Version By
		= Hash Tag
		= Page
		= Your Name
	>	= Gender
	<	= Email
		= Mobile
		Product Interest
		= Comments
		= Tell Us Your Feeling
	= Checksum	

4. The "Checksum" is now hidden from user selection. Click the Save button to commit changes.

Default Column Position	Reset Save	×
Select a Document Profile or Webpart:		
Document Profile List View - Customer Survey Fo	om	~
Available Columns:	Selected Columns:	
Column Name	Column Name	
= Checksum	File Name	
	= Size	
	= Version	
	= Version Date	
	= Version By	

III. Reset Default Column

1. To reset all changes, click the "Reset" button.

Default Column Position	Reset Save	×
Select a Document Profile or Webpart:		
Document Profile List View - Customer Survey Form		~
Available Columns:	Selected Columns:	
Column Name	Column Name	
= Checksum	File Name	
	= Size	
	= Version	
	= Version Date	

2. Click the "OK" button to confirm.

apac.antelopecloud.net says		
Are you sure to reset the current def	ault column orderi	ng?
	Cancel	ок

3. The default columns are reset to their original status.

Default Column Position			Reset	×
Select a Document Profile or Webpart:				
Document Profile List View - Customer Survey Form				~
Available Columns:		Selected Columns:		
Column Name		Column Name		
		File Name		
		= Size		
		= Version		
		= Version Date		
		= Version By		
		= Hash Tag		
		= Page		
		= Your Name		
	>	= Gender		
	<	= Email		
		= Mobile		
		= Product Interest		
		= Comments		
		= Tell Us Your Feeling		
		= Checksum		

Y. Company Information

I. View Company Information

1. To view company information, from the Setup menu, select "Administrative > Company Information".



2. Change the information and click the Update button to commit changes.

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