Antelope 6 Workspace Administration Manual

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Table of Contents

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.

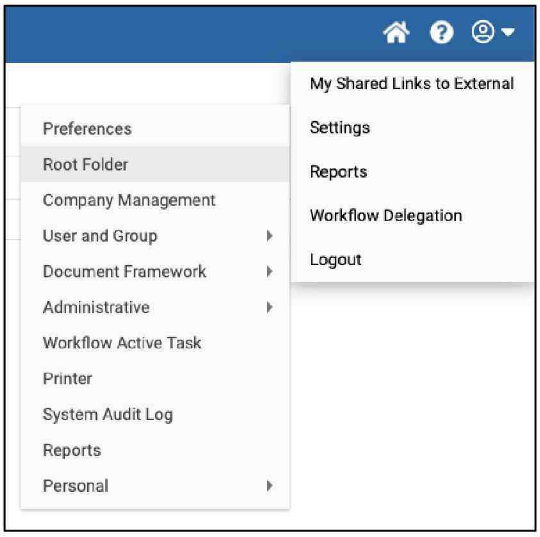
2. Each company can only assign one Home folder, one Workflow folder and one System folder. For example, if a company (e.g. SampleCorp Innovation) has two subsidiaries (e.g. PrivateWine), then each business unit is required to have its own set of root folders.

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

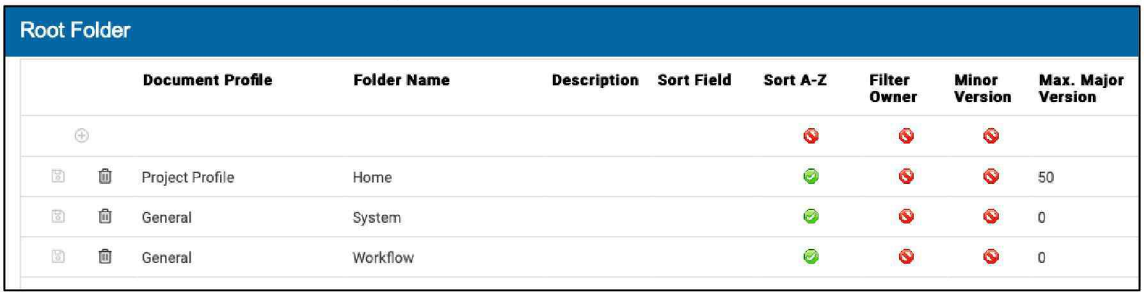
II. Creating New Root Folder

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.

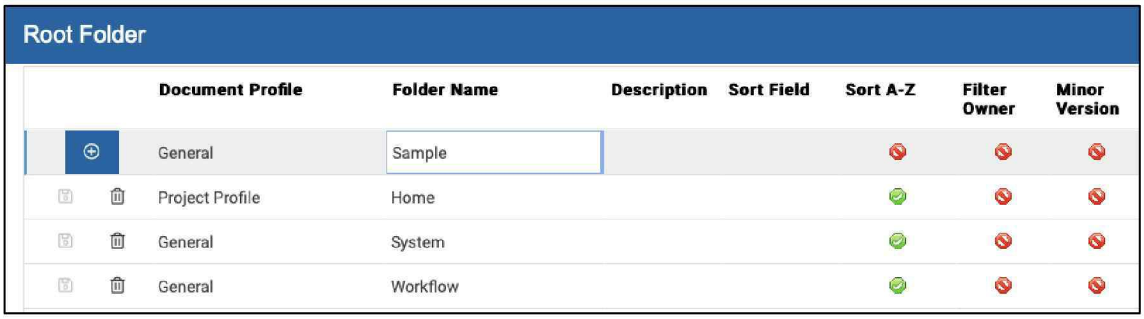


4. Fill in the information on the top row.

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.	⊘

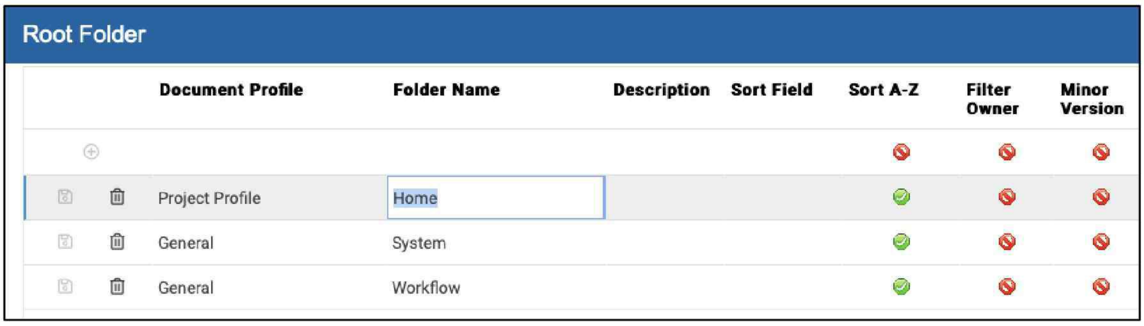
Rule	Naming rules when create new sub-folders or documents under the root.	⊘
Watermark	Apply watermark when preview the documents.	⊘

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



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.



> 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

1. To delete a root folder, click the delete icon .
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

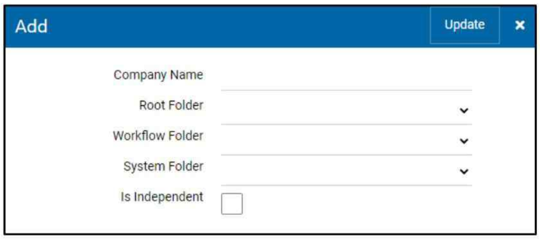
II. Creating New Company

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”.

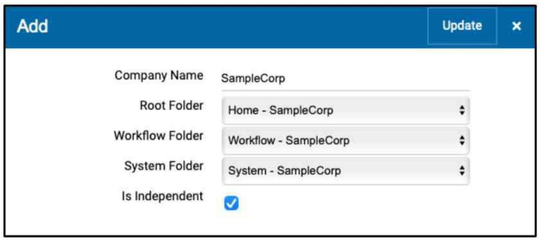
2. The Company Management window will appear.

3. Click the add button in right of top corner from the top tools bar.

4. The Add window will appear.



5. Fill in the information in Add window.



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.

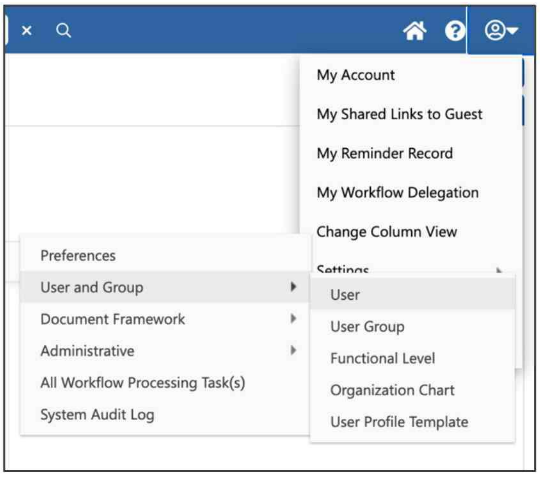
IV. Delete Company

1. To delete a Company, select that Company name.
2. Click the delete icon 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 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.

3. Fill in the information on the top row.

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 Expire	Password never expire or not for the user.	⊘
Locked	The user is locked.	⊘
Disabled	The user is disabled.	⊘

Device Password	Used with specific control on MEAP	********
Quota Schema	The limited quota assign to the user.	
User Profile Template		
Modified Date	The latest modified date and time of the user.	
Created Date	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 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 on the second column.
4. A confirmation message “Are you sure?” will appear.
5. Click “OK” button to confirm deleting.

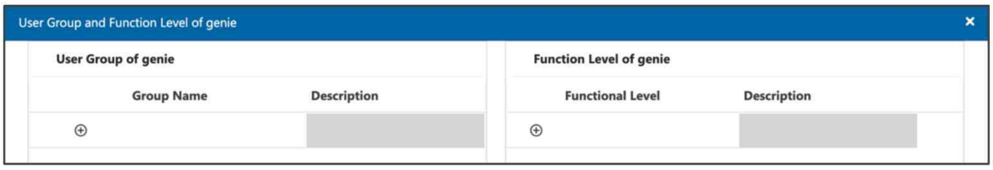
IV. Assign User Account to User Group

1. Open the User window.

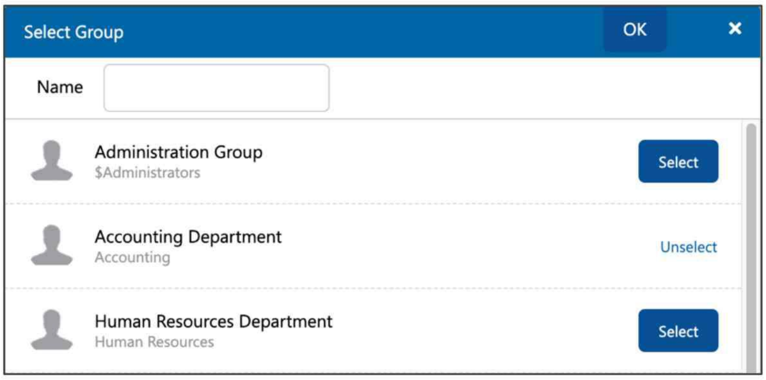
2. Looking for the user record which is required to assign the user group and function level.

3. Click the button on the third column beside the selected user.

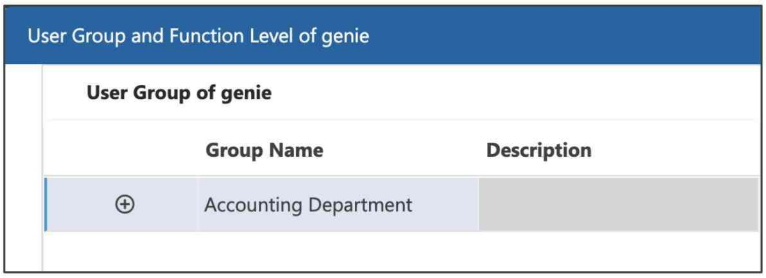
4. User Group and Function Level of [Selected Username] window will appear.

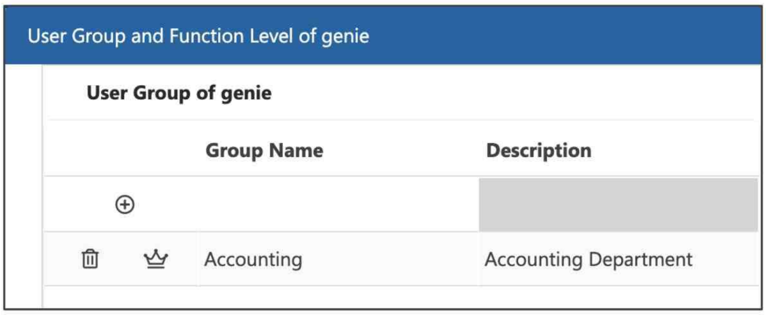


5. Click the top empty column to select the “User Group” and “Function Level”.



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





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.

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

3. A confirmation message “Confirm to replace user?”, will appear.

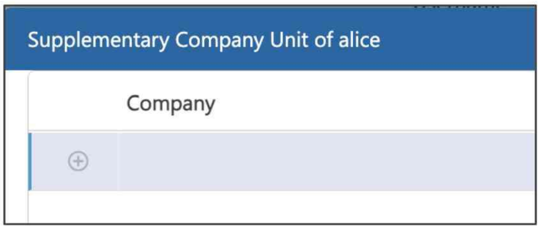
4. Click the OK button to confirm replacing user account.

5. A notice message “Success!”, will appear. The “Disable” column of replaced account will auto change to icon.

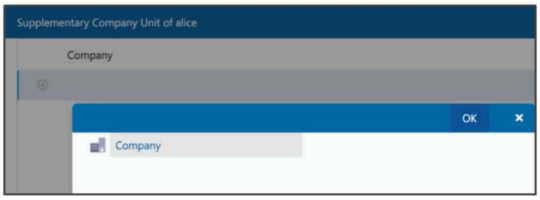
VI. Supplementary Company (Not available on Antelope 6 Cloud Version)

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

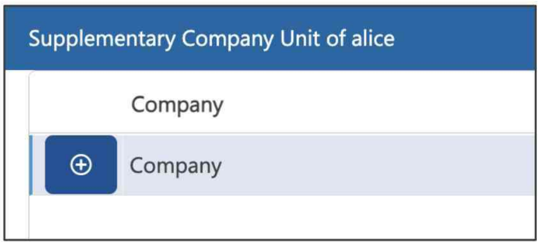
2. Click the first empty row.



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



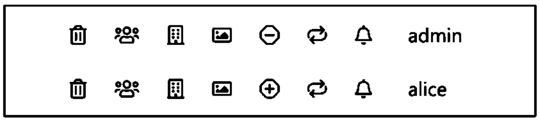
4. Click the Add button to add the Supplementary Company Unit.



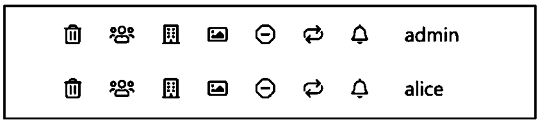
VII. Assign Concurrent User Account to Named User Account

1. Select a user account.

2. Click the assign ticket button in the fifth column to assign name license.



3. The user account is changed into named one.



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.

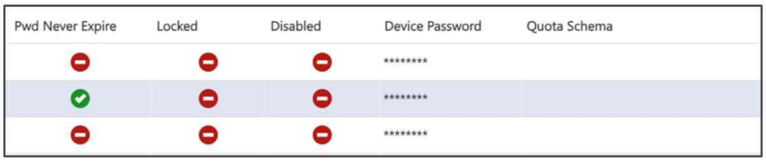
3. Select the user(s) to be the secretary of the selected user record.

4. The save button on the left-hand side will be available.

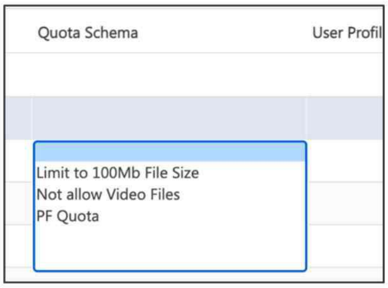
5. Click save button to commit changes.

IX. Assign User Account with Quota Schema

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



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

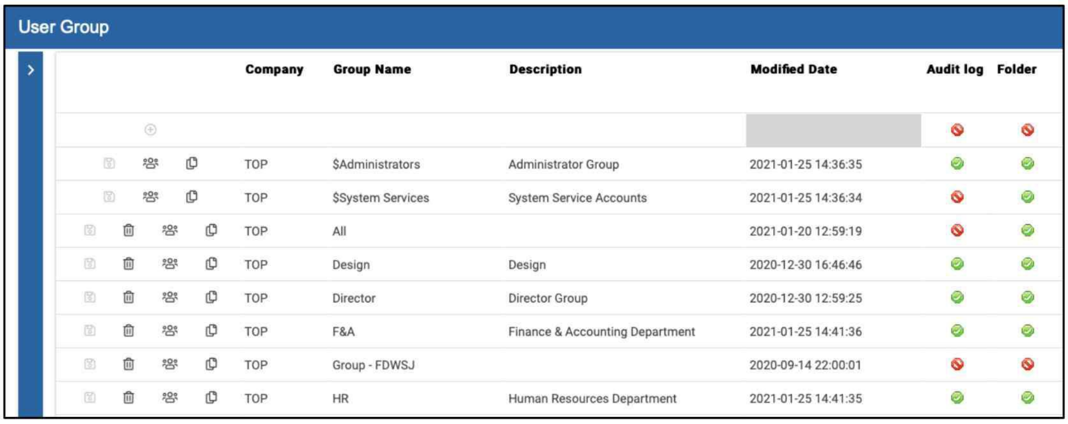


3. Click save button to commit changes.

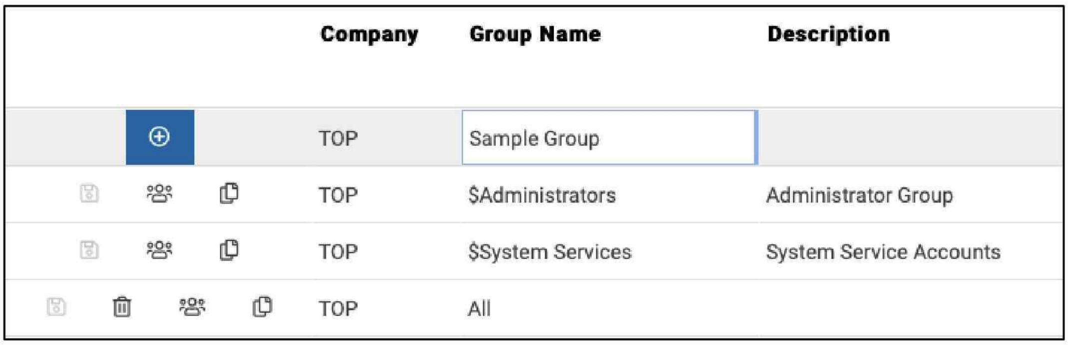
D. User Group

I. Create New User Group

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” > “User Group”.
3. The User Group window will appear.



4. Fill in the information on the top row.



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.	⊘
Folder*	Able to access the folder.	⊘
Document Profile*	Able to manage document profile.	⊘
User and Group*	Able to manage user and group	⊘
Recycle Bin*	Able to access recycle bin	⊘
Recycle Bin View All Documents*	Able to view all document deleted by other user in recycle bin	⊘
Purge Recycle Bin File*	Able to purge document in recycle bin.	⊘

Root Folder*	Able to manage root folder.	
Permission Level*	Able to manage permission level.	
Application*	Able to access “Application” folder.	
System*	Able to access “System” folder.	
Administrative*	Able to manage “Administrative” setting.	
Authorization*	Able to manage “Authorization” setting.	
Dashboard Designer*	Able to manage “Dashboard Designer” 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 on the left-hand side will be available.
4. Click save button 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 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 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 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 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 ⊕ at the first column to add the selected user group.

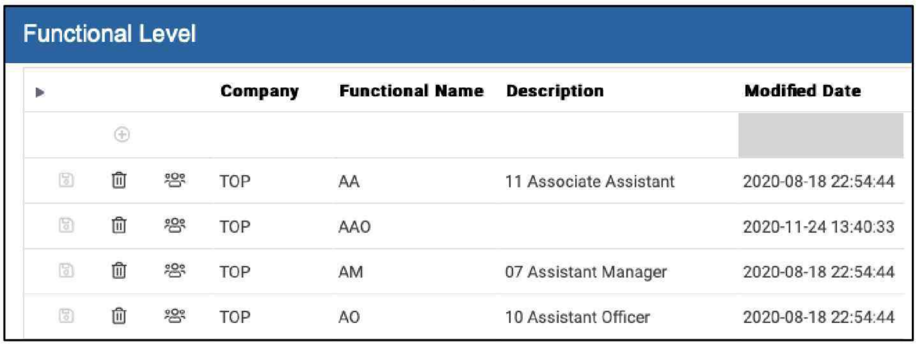
E. Functional Level

I. Background

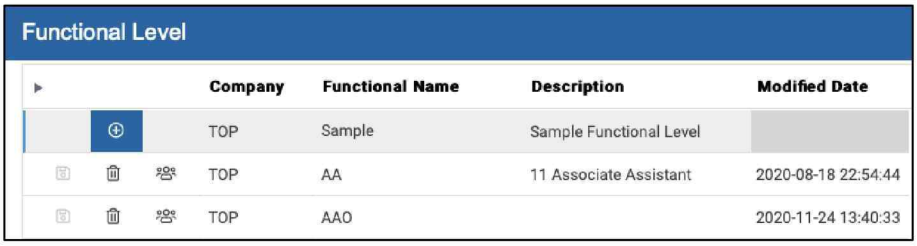
1. Functional level can be used to create job title for a group of users. One user can be assigned more than one functional level by system administrator or which group have access right to manage the user management.

II. Create New Functional Level

1. Click the icon 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.



4. Fill in the information on the top row.



Field	Description
Company*	Assign Company for this user group.
Functional Name*	Display name of the functional level.
Description	User group description.
Modified Date	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 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 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 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 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 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 ⊕ at the first column to add selected user group.

F. Organization Chart

I. Background

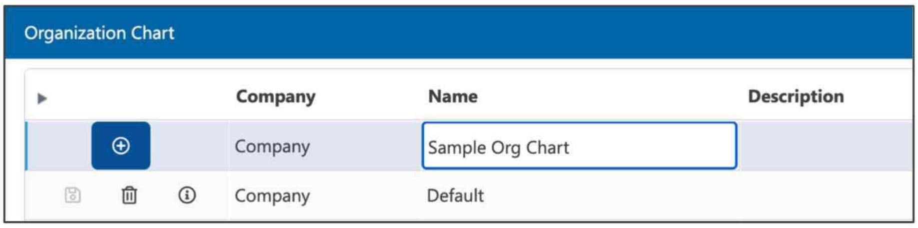
1. Organization Chart is a mapping about the organization between different user, user group and functional level

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.



4. Fill in the information on the top row.

Field	Description
Company*	Assign Company for this organization chart.
Name*	Name of the organization chart.
Filter	Description of the organization.

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

5. Click the add button 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 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 on the second column.

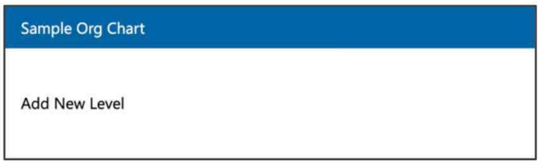
4. A confirmation message "Are you sure?" will appear.

5. Click "OK" button to confirm deleting.

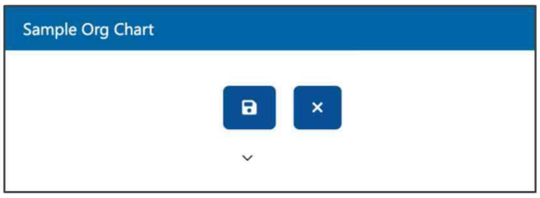
V. Create a New Node

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

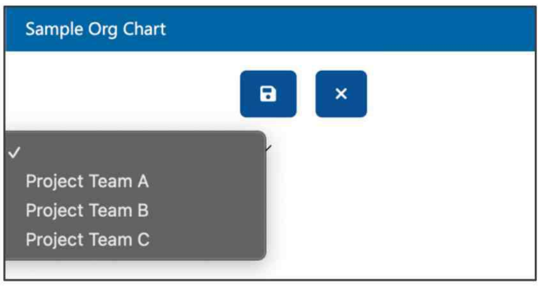
2. A window with selected record name will appear.



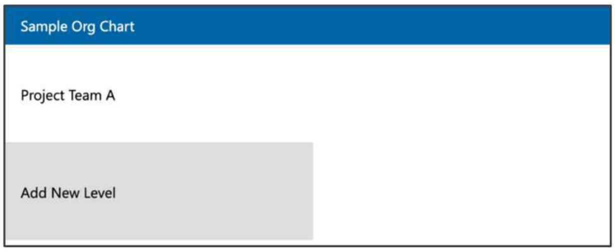
3. Click the text "Add New Level" to bring up a drop-down list for add a functional level.



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

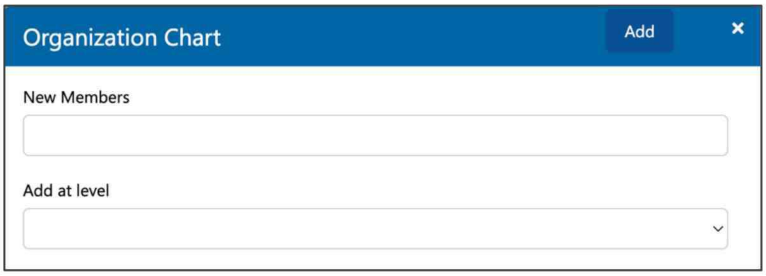


5. A new node is assigned.

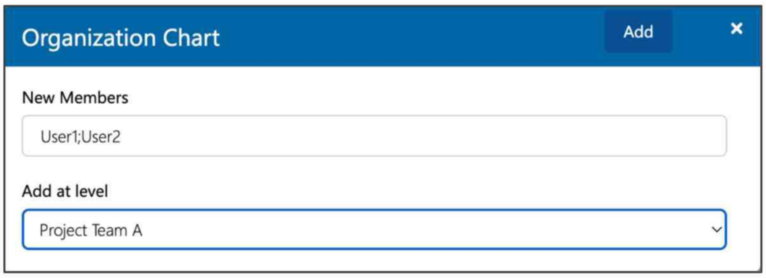


6. From the tools bar on the right of top, click the “Add” button .

7. New Organization Chart Item window will appear.



8. Fill in the information for the item.



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 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 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.

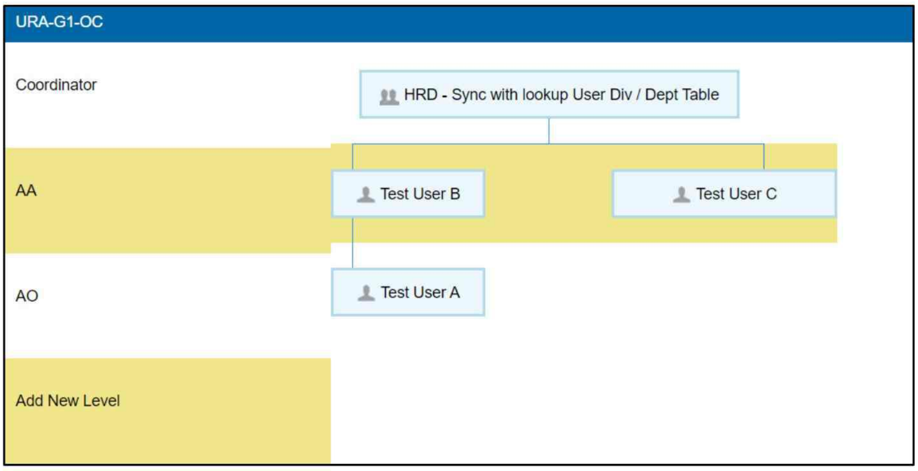
5. A confirmation message “Are you sure?” will appear.

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.



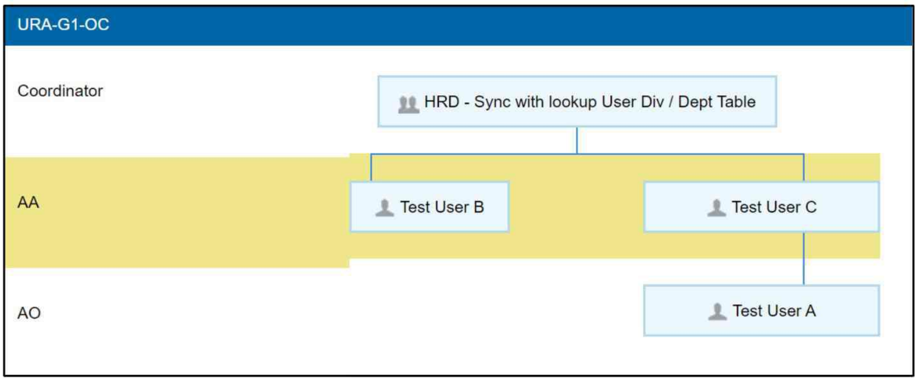
3. (e.g Organization Chart “G1-OC” have 3 levels, Level 1st “Coordinator”, Level 2nd “AA” and Level 3rd “AO”. Coordinator “HRD” want to cut Test User A to under Test User C.)

4. Click and select the item which is required to cut.

5. From the tools bar on the right of top, click 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.



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 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

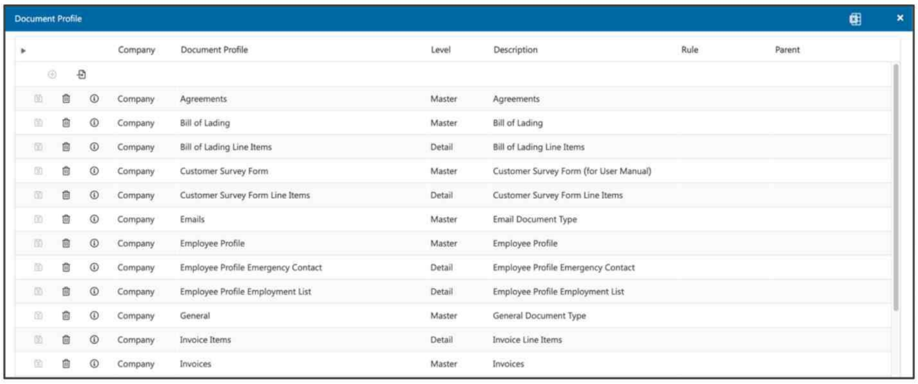
1. System allows administrator to design different Document Profile and assign it to a folder. When browsing the folder, the defined Document Profile would be the column in that folder. Also document or folder created inside this folder would allow inputting information base on the setting in the Document 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

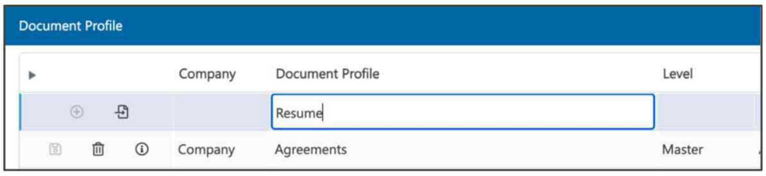
1. Click the icon with the login name in right top corner from the top bar from bring up the context menu.

2. From the context menu, select "Settings" > "Document Framework" > "Document Profile".

3. The Document Profile window will appear.



4. Input a new Document Profile name.



5. Select "Master" from Level.

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.

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 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 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.

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

5. Fill in the information on the top row.

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 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 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

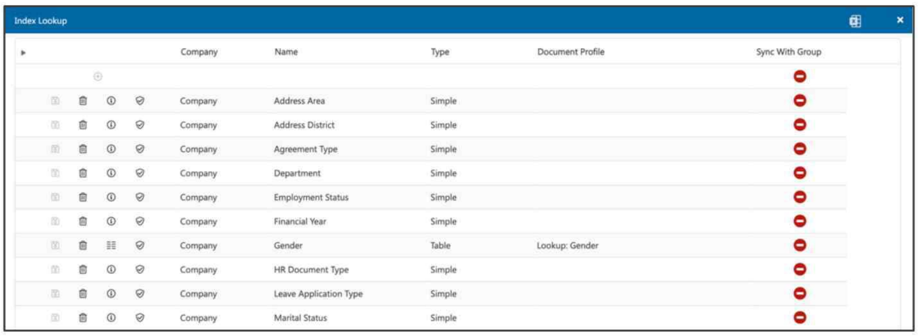
1. Index Lookup is provided a pull-down list for setup the value. The type of the field must be string to make it effective.

II. Create New Index Lookup

1. Click the icon 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.



4. Fill in the information on the top row.

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

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

5. Click the add button on the first column to create a new index lookup.

III. Modify Existing Index Lookup

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

2. Click the save button to commit changes.

IV. Delete Existing Index Lookup

1. Click the delete icon.

2. A confirmation message “Are you sure?” will appear.

3. Click “OK” button to confirm deleting.

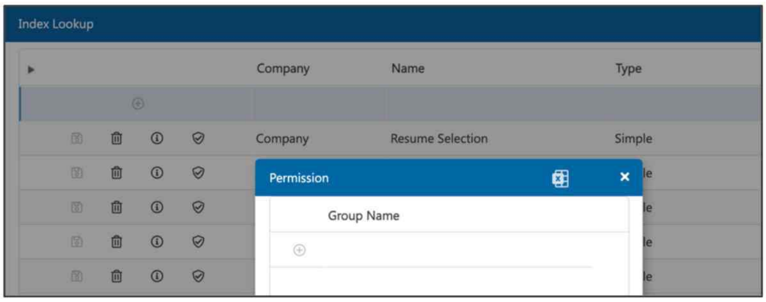
V. Index Lookup Permission

1. Open the Index Lookup window.

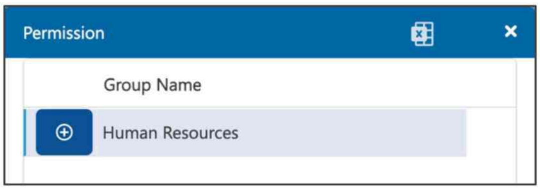
2. Looking for the index lookup which is required to assign to the user group.

3. Click the Permission button beside the selected index lookup record.

4. Permission window will appear.



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



6. After select the user group, click add button to add the selected user group.

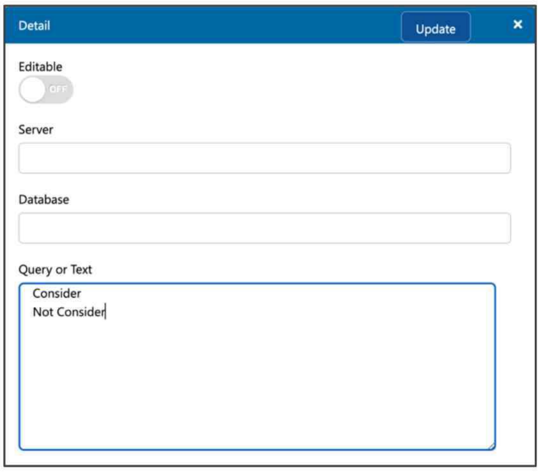
VI. Create Simple Item Index Lookup

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

2. Click the detail icon ⓘ.

3. The Detail window will appear.

4. Fill in the “Query or Text” in the window.

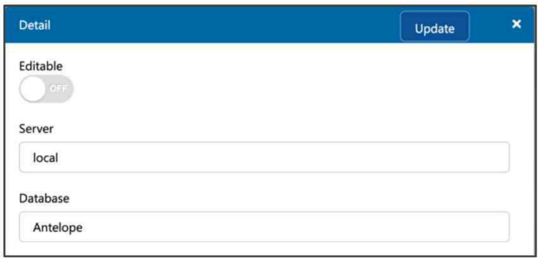


Field	Description
Editable	Enable user edit the text of the index lookup.
Server	Connect with the server path.
Database	Connect with the database.
Query or Text	The selection of index lookup.

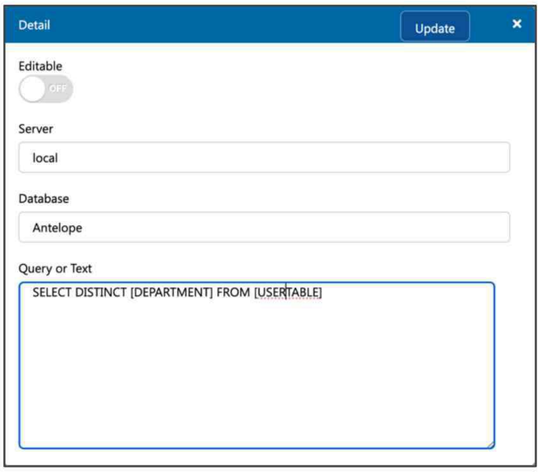
5. After modify, click the Update button to save your changes.

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.



2. You can write a Query to retrieve information.



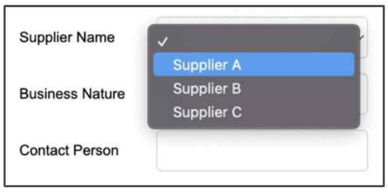
3. After modify, click the Update button to save your changes.

VIII. Create Table Type Index Lookup

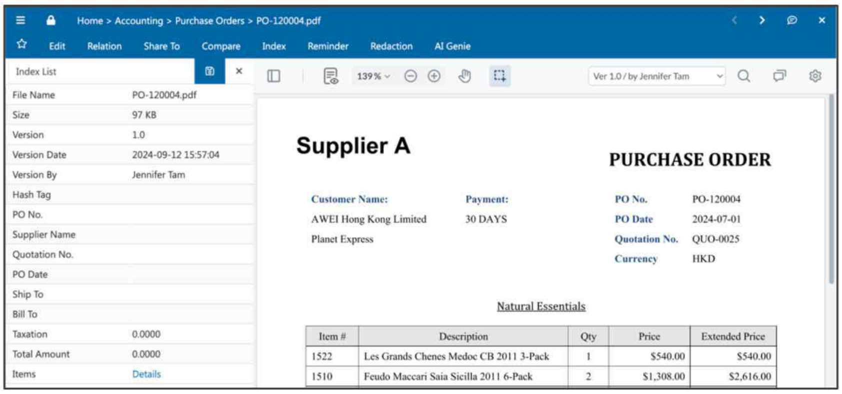
1. Table Type Index Lookup is different from Simple Index Lookup. Simple type one contains only a pull-down list of selection, while Table type is a 2-D matrix. The following is an example:

<table>
<tr><th></th><th>Simple type Index Lookup</th><th>Table type Index Lookup</th></tr>
<tr><td>Sample</td><td>Supplier A
Supplier B
Supplier C</td><td>
<table>
<tr><th>Supplier Name</th><th>Business Nature</th><th>Contact Person</th></tr>
<tr><td>Supplier A</td><td>Food & Beverage</td><td>Peter</td></tr>
<tr><td>Supplier B</td><td>Computer</td><td>John</td></tr>
<tr><td>Supplier C</td><td>Stationary</td><td>Alan</td></tr>
</table>
</td></tr>
</table>

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.



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

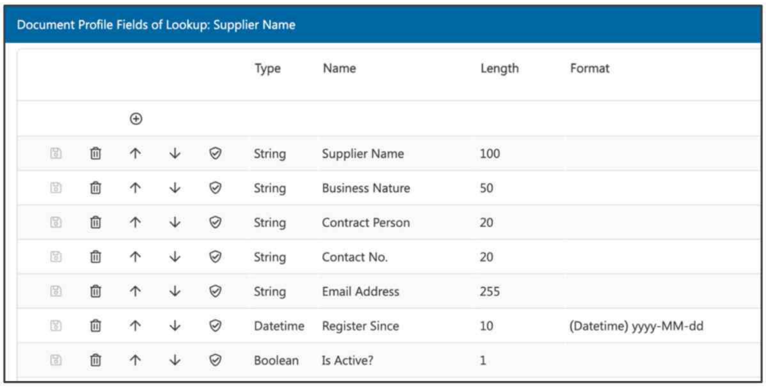


When you select the Supplier Name index field, the entire lookup table is shown for your selection, instead of just a simple pull-down list of Supplier Name.

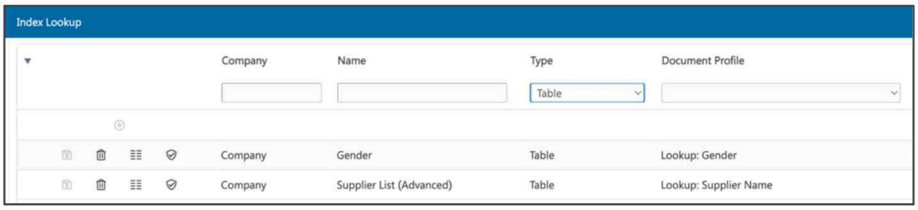

Items

	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	✓
✓	Supplier B	Hardware	John	1234567	john@demo.com	2023-07-12	✓
✓	Supplier C	Stationary	Alan	1234567	alan@deemo.com	2019-04-01	✓

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



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



4. Click the Items icon.

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

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 on the first column to add the new index lookup.

4. Click the items button 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.

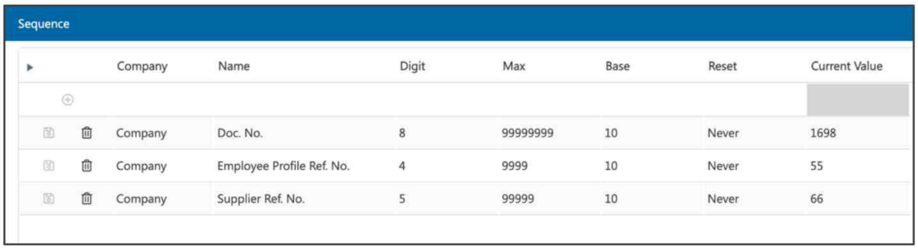
I. Sequence

I. Create New Sequence

1. Click the icon 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.



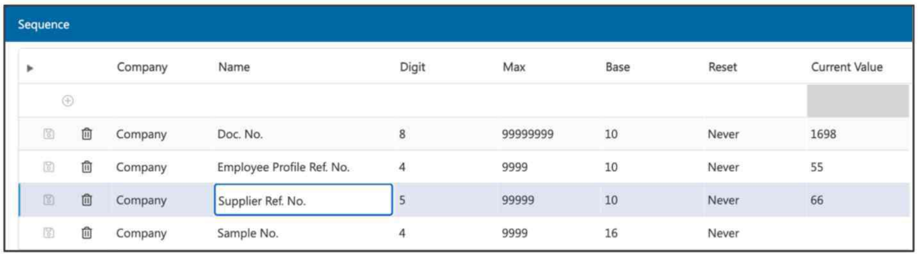
Field	Description
Company	Assign Company for the document profile.
Name	Display name of the Sequence.
Digit	Digit of the sequence, for examples 3 digits = 001, 002, 003 … 5 digits = 00001, 00002, 00003 …
Max	Maximum running number can reach, for examples 9999 = 0001, 0002, 0003 …. 9999 1500 = 0001, 0002, 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
		Company	Doc. No.	8	99999999	10	Never	1698
		Company	Employee Profile Ref. No.	4	9999	10	Never	55
		Company	Supplier Ref. No.	5	99999	10	Never	66
		Company	Sample No.	4	9999	16	Never	

3. After modifying the information. The save button  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  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 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.

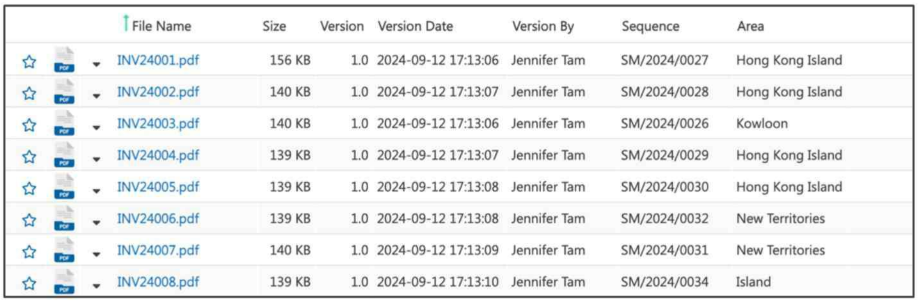
Field	Description
Company	Assign Company for the document profile.
Name	Display name of the Rule.
Target Type	Rule of target type.
Pattern	Display pattern of the rule.

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
INV24001.pdf	156 KB	1.0	2024-09-12 17:13:06	Jennifer Tam	SM/2024/0027	Hong Kong Island
INV24002.pdf	140 KB	1.0	2024-09-12 17:13:07	Jennifer Tam	SM/2024/0028	Hong Kong Island
INV24003.pdf	140 KB	1.0	2024-09-12 17:13:06	Jennifer Tam	SM/2024/0026	Kowloon
INV24004.pdf	139 KB	1.0	2024-09-12 17:13:07	Jennifer Tam	SM/2024/0029	Hong Kong Island
INV24005.pdf	139 KB	1.0	2024-09-12 17:13:08	Jennifer Tam	SM/2024/0030	Hong Kong Island
INV24006.pdf	139 KB	1.0	2024-09-12 17:13:08	Jennifer Tam	SM/2024/0032	New Territories
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

Company	Name	Target Type	Pattern
Company	Doc. No.	All Items	DC-[Doc. No.]
Company	Employee Profile Ref. No.	All Items	EP-[Employee Profile Ref. No.]
Company	OA No.	All Items	OA-[An.Year.2Digit]-[OANO]
Company	Project Log Ref No. Rule	Document Only	LOG-[Project Log Ref No.]
Company	Sample No.	All Items	SM-[An.Year]-[An.Month.2Digit]-[Sample No.]
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.

Rule Details

Field Name 2	Match Value 1	Conditioı	Field Name 2	Match Value 2	Pattern
Area	Island	and			ILN/[An.Year]/[Sample No.]
Area	New Territories	and			NT/[An.Year]/[Sample No.]
Area	Kowloon	and			KLN/[An.Year]/[Sample No.]
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 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 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.

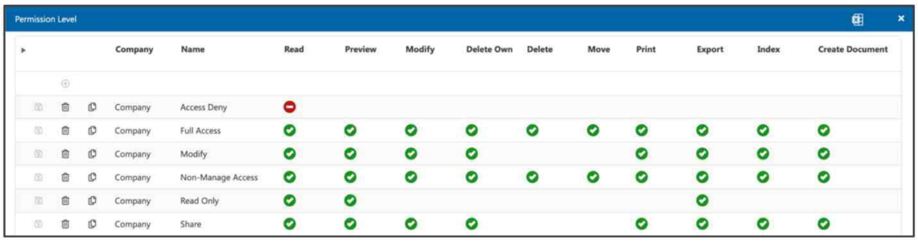
For example, User A have been assigned two permission level which is “No Access” and “Read Write” permission into the same folder. Then User A would have no access for that folder because of the permission level will take the least effect.

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.



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"				•				
Major Versions: > Ver. 1 as Owner can Delete/Cut Document"					•			
Minor Versions: > Ver. 0 as Owner can Delete/Cut Document"					•			
Move Document Required Move + Create Document"						•		•
Redaction					•		•	
Print 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 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 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.

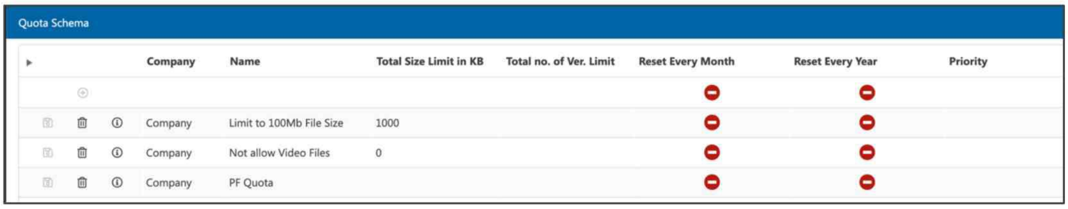
Quota schema would be taking the least effect. For example, that User A have been assigned 1GB quota, Root Folder have been assigned 50 MB, the Folder A which is under the root folder have been assign 5KB. Then User A required to upload a word file about 22KB in folder “Root Folder > Folder A”, system 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”.

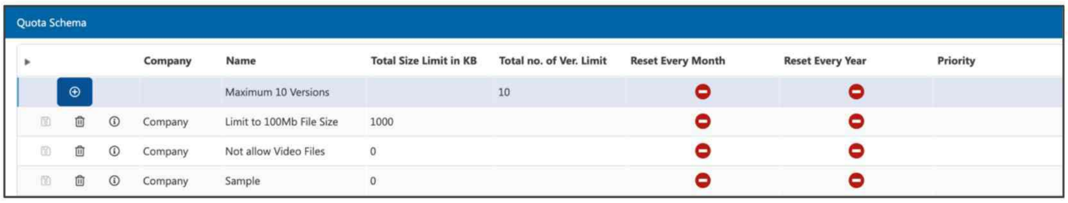
3. Quota Schema window will appear.



Quota Schema

Company	Name	Total Size Limit in KB	Total no. of Ver. Limit	Reset Every Month	Reset Every Year	Priority
Company	Limit to 100Mb File Size	1000				
Company	Not allow Video Files	0				
Company	PF Quota					

4. Fill in the information on the top row.



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			
Company	Limit to 100Mb File Size	1000				
Company	Not allow Video Files	0				
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 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.

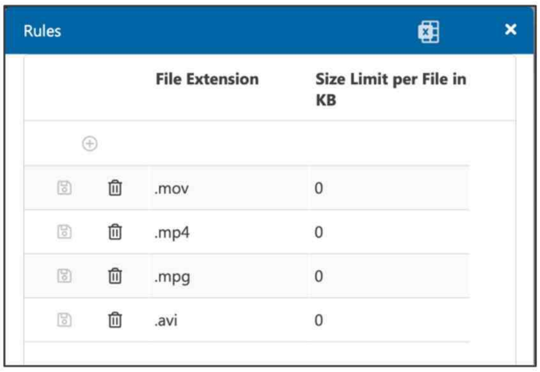
1. Open the Quota Schema window.

2. Looking for the existing quota schema record which is required to apply quota schema rules.

3. Click the rules button .

4. Rules window will appear.

5. Fill in the information on the top row.



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.

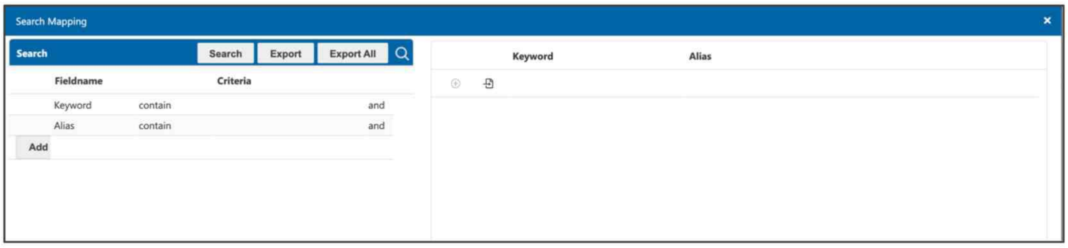
M. Search Mapping

I. Create New Search Mapping

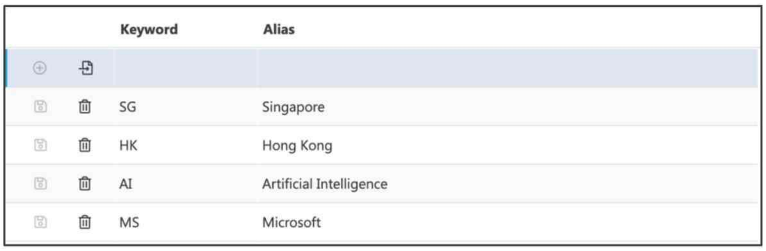
1. Click the icon with the login name in right top corner from the top bar from bring up the context menu.

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.



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

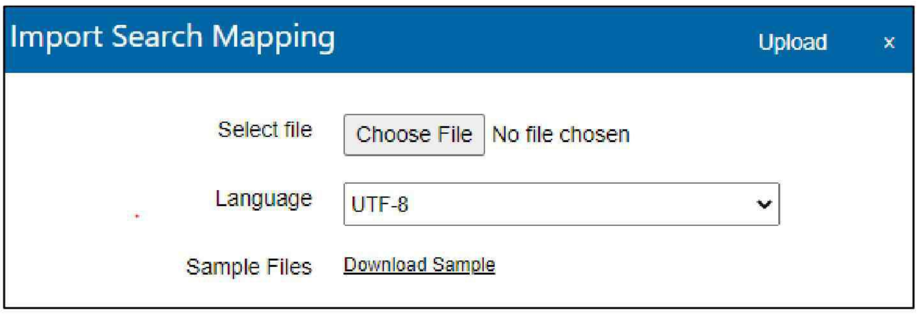
1. Open the Search Mapping window.
2. Click the value which is required to change.
3. After modifying the information. The save button on the left-hand side will be available.
4. Click save button to commit changes.

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 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.



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.

2. From the context menu, select "Settings" > "Administrative" > "All Shared Links to External".

3. Looking for the shared link which is required to edit.

4. Click the edit button 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 🗑 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

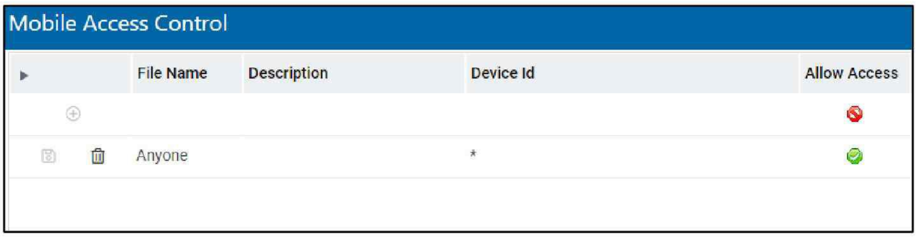
Mobile Access Control is a list for managing the access control from the mobile device. System support administrator to manage the mobile access control by using the device id. From the device id, administrator can enable or disable the device which can access the Antelope 6.

II. Create New MAC

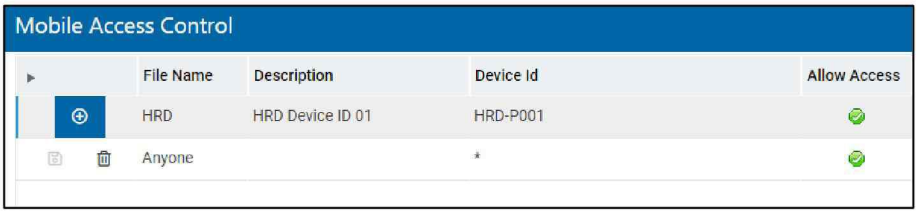
1. Click the icon with the login name in right top corner from the top bar from bring up the context menu.

2. From the context menu, select “Settings” > “Administrative” > “Mobile Access Control”.

3. The Mobile Access Control window will appear.



4. Fill in the information on the top row.



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 on the left-hand side will be available.

4. Click save button 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 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

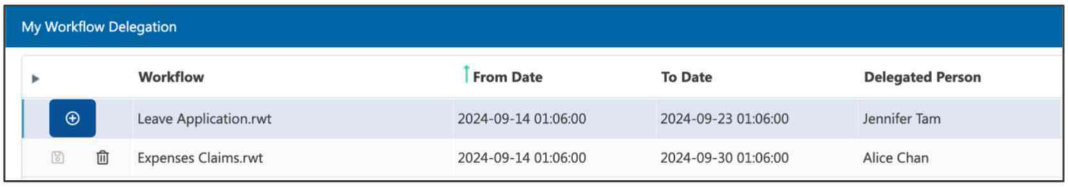
Workflow Delegation is a table of all the workflow delegation from user. System support administrator to manage all the user workflow delegation in Workflow Delegation window.

II. Create New Workflow Delegation

1. Click the icon 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.



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 on the left-hand side will be available.
4. Click save button 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 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

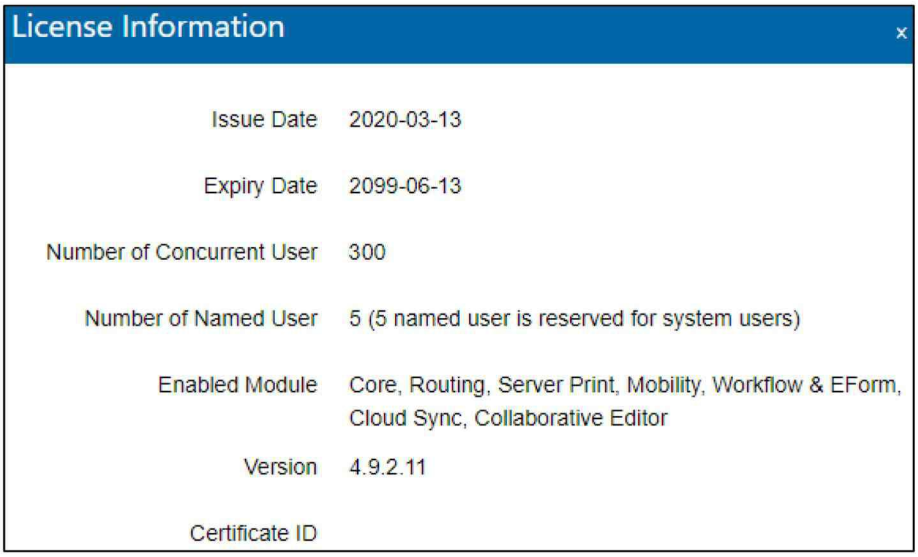
License Information is the list of information of the Antelope 6 license. System support administrator to check the information of the license like the license issue date, expiry date, number of concurrent users, number of named user, enabled module, version and certificate id.

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.



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 Report	Generate report about access right approval of selected 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 Report	Generate a list of document, version history of document and 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 Report	Generate a report including the log which action have triggered the 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

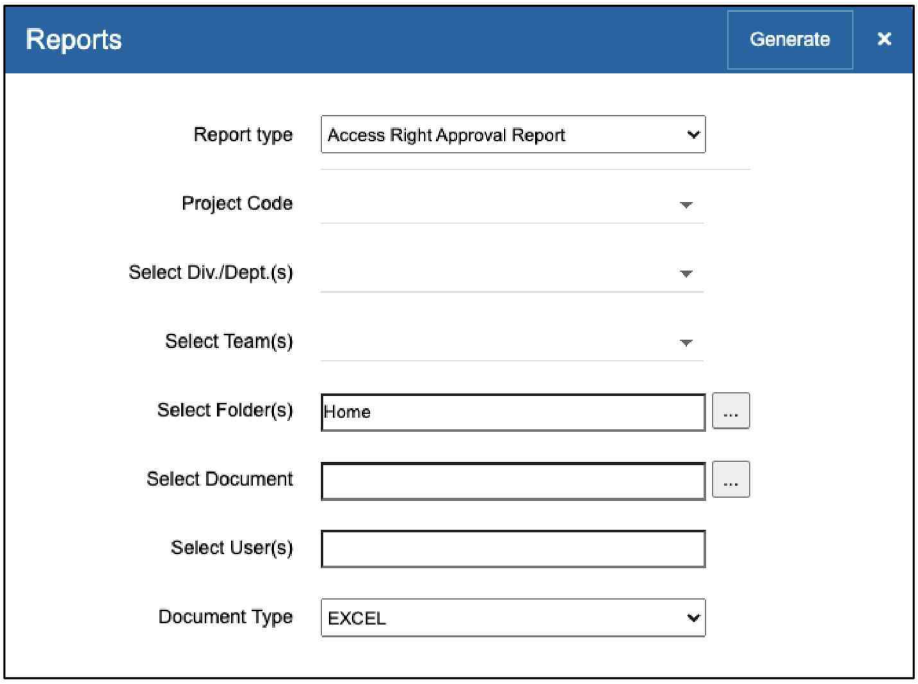
	Select Folder(s)
Group Member Report tram	Generate a list of select group(s), department(s), team(s) or user(s). Required : Select Group(s) Select Department(s) Select Team(s) Select User(s)
Incoming Document Registration Report	Searching all incoming document details registries by workflow "Incoming Document Registration" with selected department(s) or team(s) Required : Select Department(s) Select Team(s) From (Date) To (Date)
Incoming Document Status Report	Searching all incoming document status registries by workflow "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 Report	Checking the document and document details which is large than inputted size. Required : Folder level From (Date) To (Date) File Size (MB)
Large Version Document Report	Checking the document and document details which document 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 Acknowledgement of	Searching all incoming document details registries of the workflow process by workflow "Incoming Document Registration" with selected period.

Incoming Document Report	Required : From (Date) To (Date)
Temporary Permission Report	Generating a report including all the temporary report of the 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 Report	Ability to generate the user permission list of the selected folder(s) and the permission list of selected department(s), Team(s). Required : Folder level Select Folder(s) Select Department(s) Select Team(s) Select User(s)
User Group and Function Report	Ability to generate the details registry list including user permission 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 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 usage of the selected department(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 :

	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.



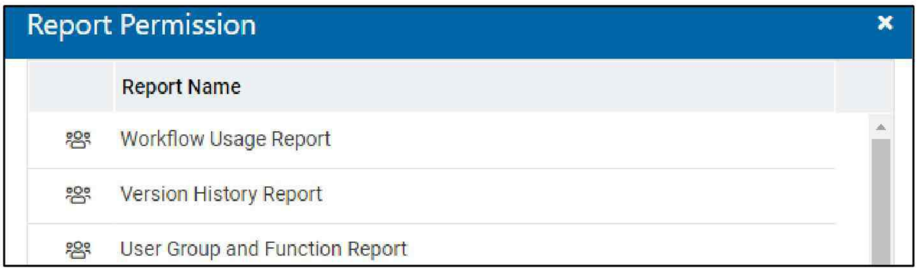
4. Click the drop-down list of the “Report type” field to select different report.
5. The field will be change by different report.
6. After select the report type and fill in the information.
7. Select “Document Type” to define the report file format.
8. Click “Generate” button.
9. The report file will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

III. Report Permission Control

1. Click the icon 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”.

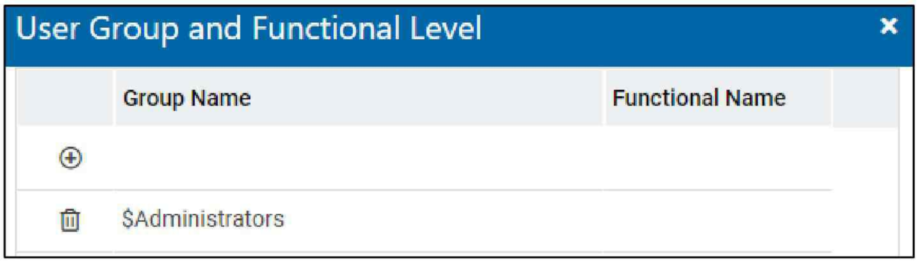
3. Report Permission window will appear.



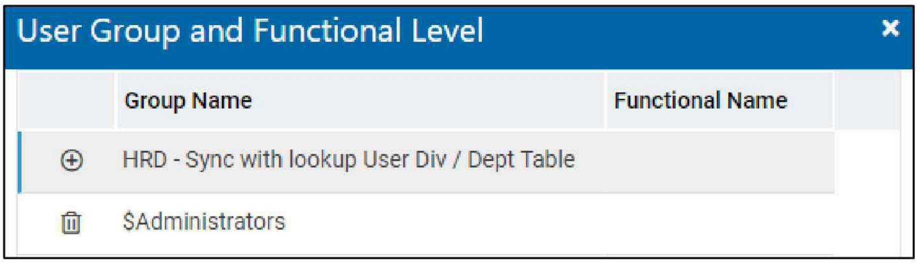
4. Looking for the report which is required to assign.

5. Click the User group and Functional level button .

6. User Group and Functional Level window will appear.



7. Fill the information of the top row.



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

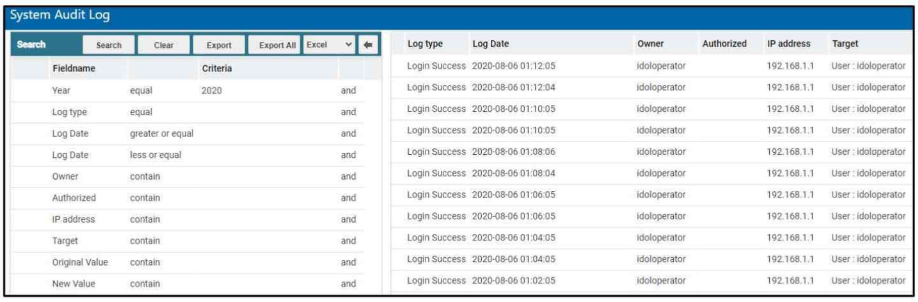
1. Click the icon with the login name in right top corner from the top bar from bring up the context menu.

2. From the context menu, select “Settings” > “System Audit Log”.

3. System Audit Log window will appear.

4. Click the “>” button of the left panel.

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



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.

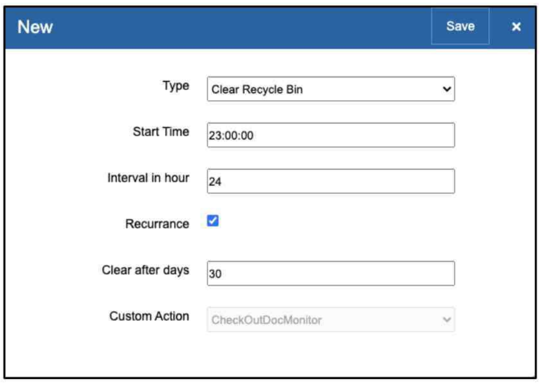
II. Create New Backend Operation

1. Click the icon 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.

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



6. Fill in the information for the operation setting.

Field	Description
Type	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.
Type	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 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 🗑 on the second column.

4. A confirmation message “Are you sure?” will appear.

5. Click “OK” button to confirm deleting.

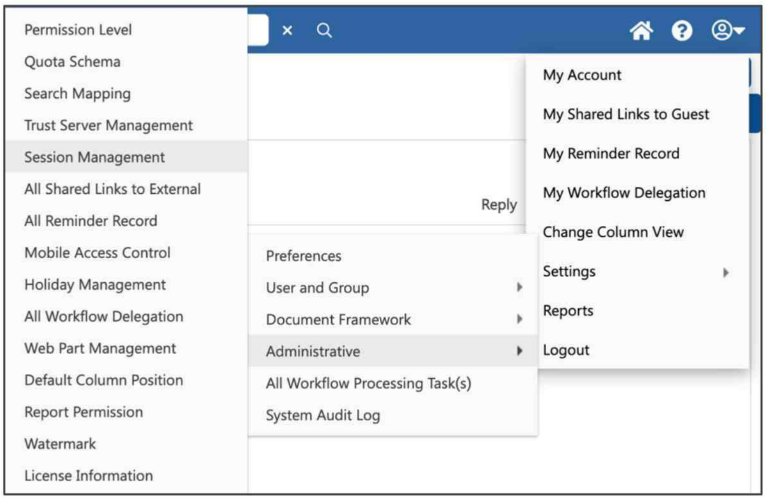
U. Session Management

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.

	Username	Display Name	Team	IP address	Last Access Time	Channel
	dsoperator	Document Service Account		EC2AMAZ-JM0AK93	2024-09-13 11:29:59	System
	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
	osoperator	Operation Service		EC2AMAZ-JM0AK93	2024-09-13 11:28:40	System
	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.

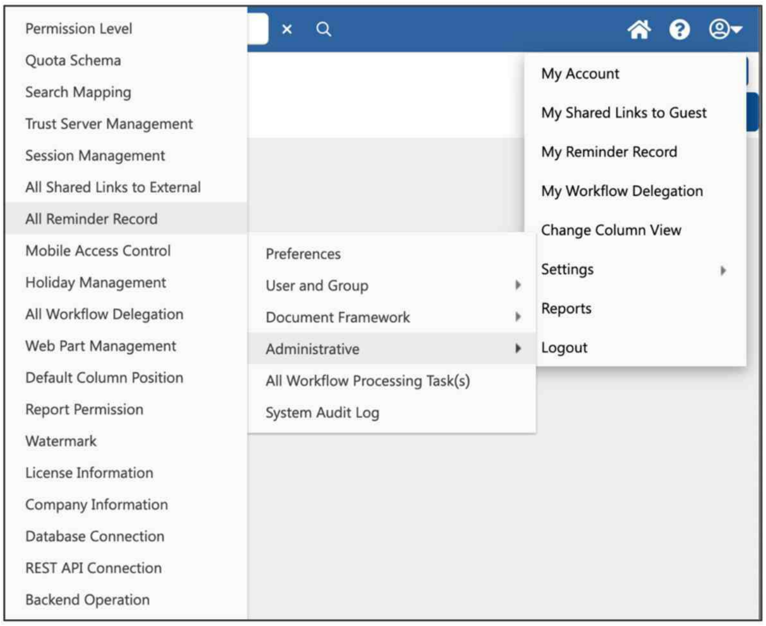
V. All Reminder Records

I. Background

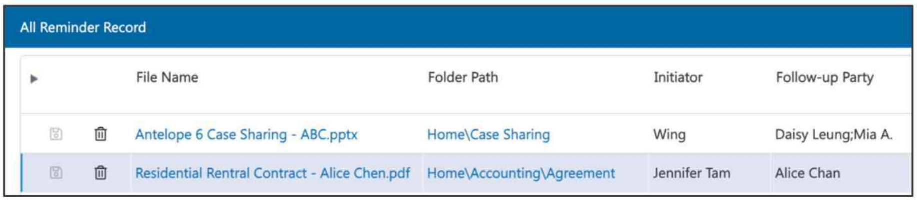
Users can set document reminder. As a system administrator, you can take control on all reminder records.

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.



W. Web Part Management

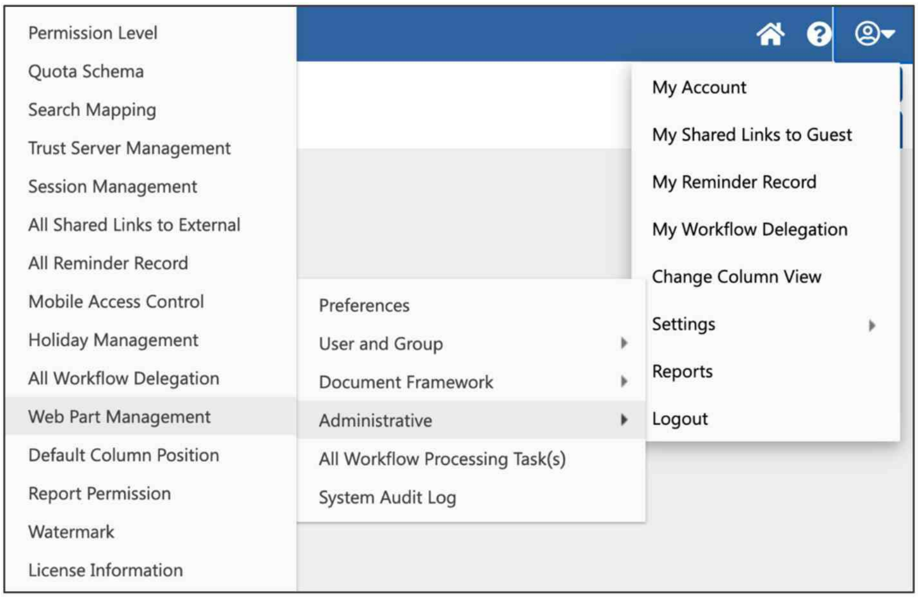
I. Background

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.

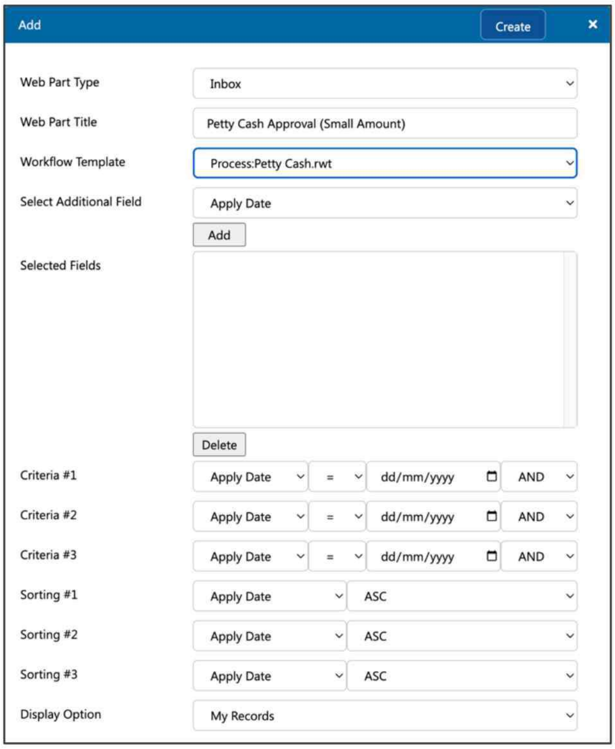


2. The Web Part Management is created, click the Add icon.

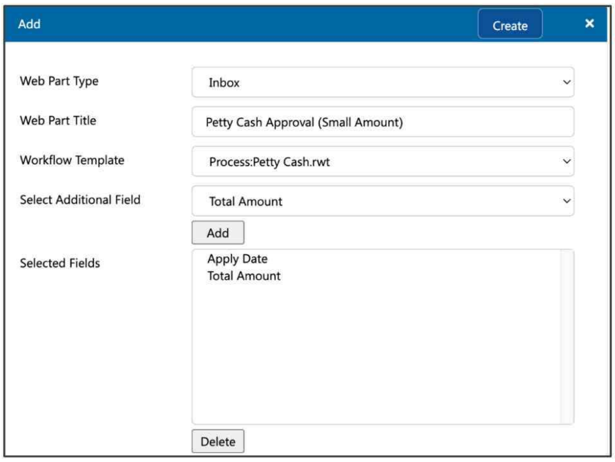
3. The new web part window appears. From the Web Part Type, select Inbox.

4. Input the Web Part Title, for example “Petty Cash Approval (Small Amount)”.

5. Select a workflow template, for example “Process: Petty Cash.rwt”.



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



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.

8. Display the sorting method.

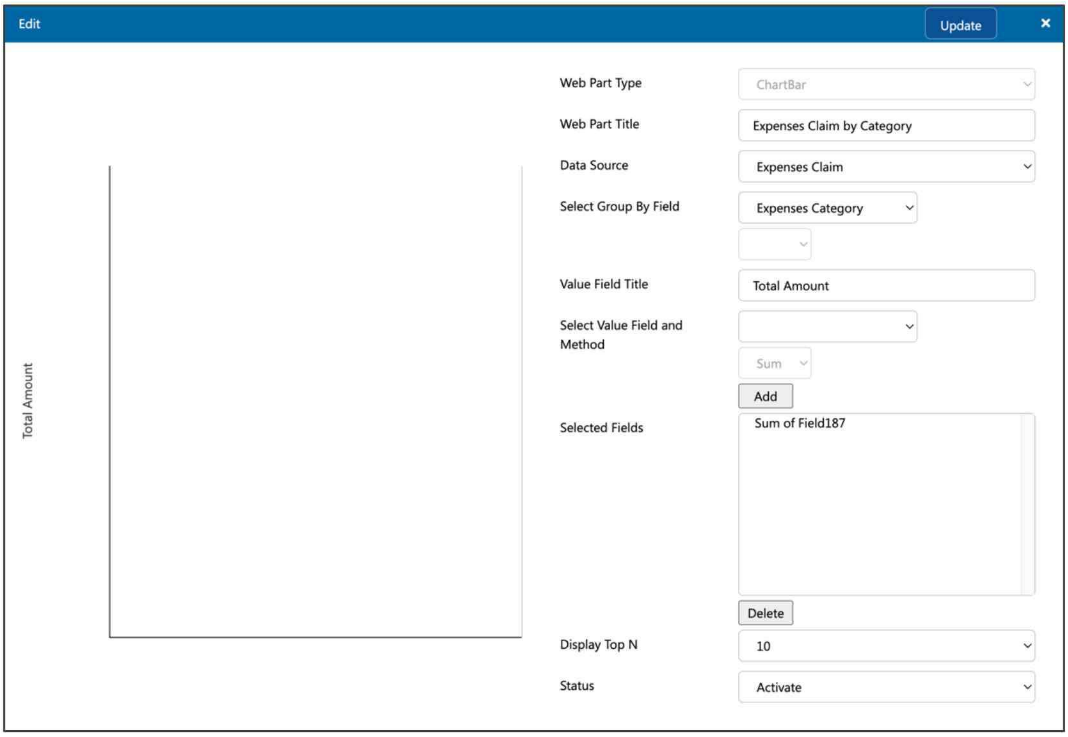
9. The Inbox web part can display your own workflow tasks, or the entire team workflow tasks within the same user group (or user groups which you have involved).

10. Other options include:

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

III. Create New Web Part – Diagram and Chart

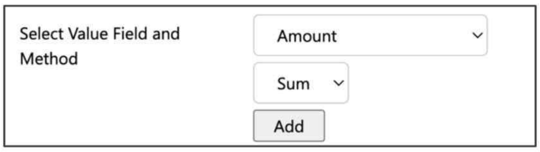
1. To create a new web part for data analysing with charts, select either Bar Chart, Line Chart or Pie Chart from Web Part Type.



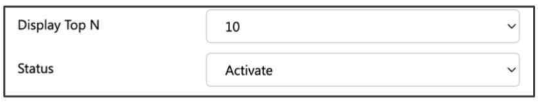
2. For x-axis label, from the Select Group By Field,

   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.

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

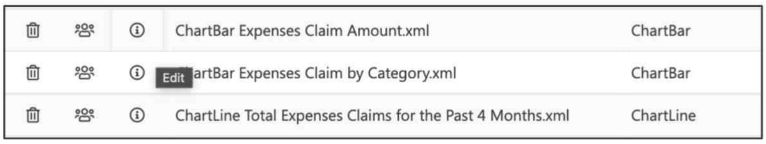


4. Select how many top records to display, and the activate status of the web part.



IV. Modify Existing Web Part

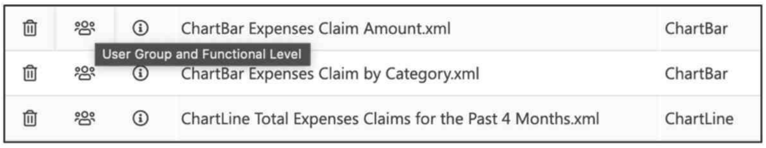
1. To modify an existing web part, click the information icon.



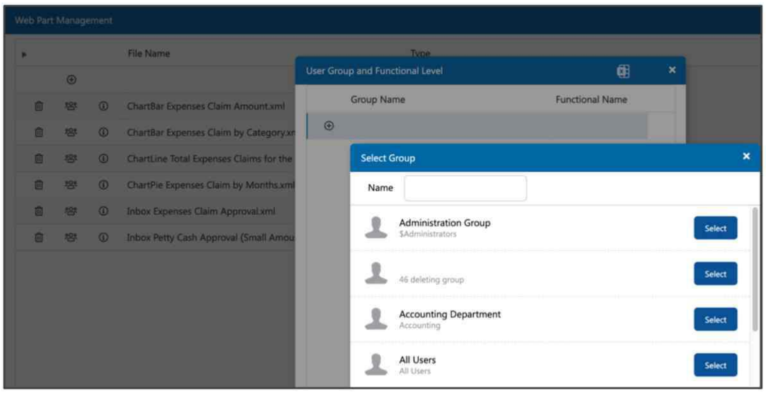
2. Modify the web part setting, click the Update button to save your changes.

V. Web Part Permission

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



2. Assign the user group to the web part.



X. Default Column Position

I. Background

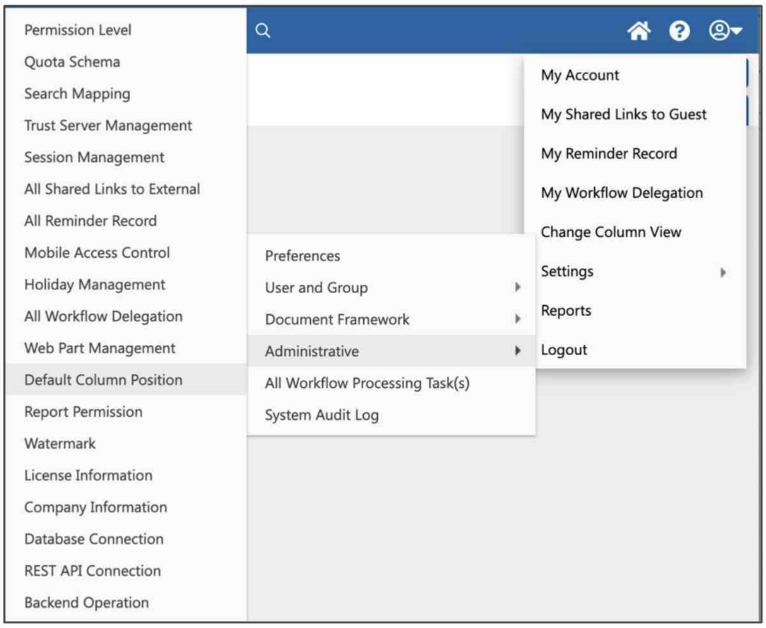
To confirm the default Document Profile index field display globally, you can do it via Default Column Position. For example, a Document Profile has the following index fields:

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

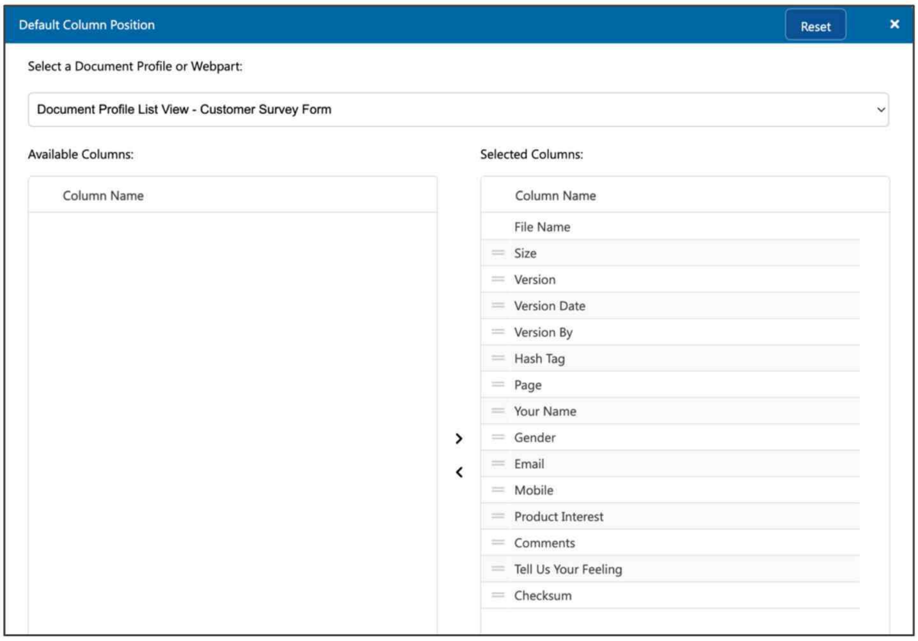
The index field "Checksum" in this case is a field that used for system integration only, and you want to hide it from user selection or modification. You can do it by configuring via Default Column Position.

II. Setup Default Column

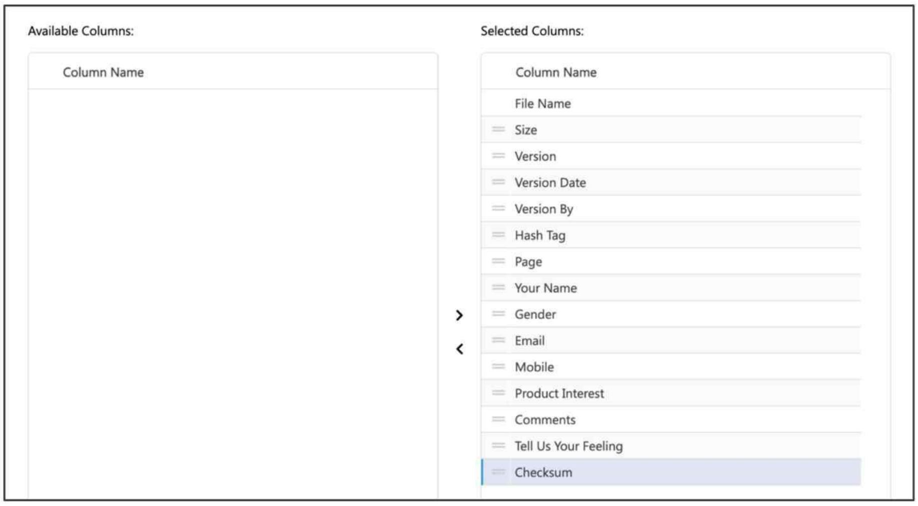
1. From the setup menu, select "Administrative > Default Column Position".



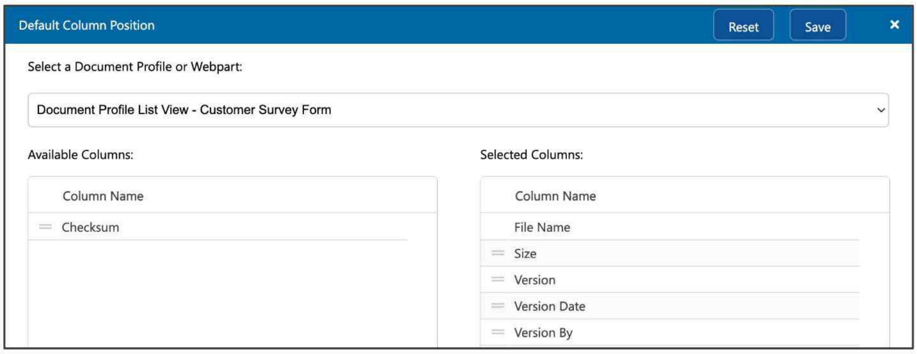
2. The Default Column Position will appear. Select the Document Profile you want to configure. For example, Customer Survey Form.



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

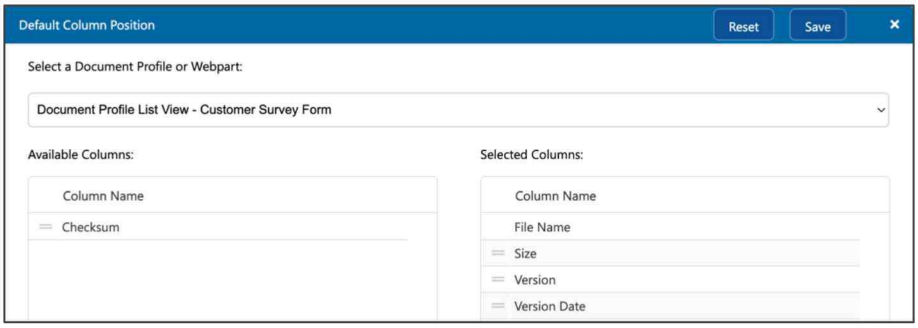


4. The "Checksum" is now hidden from user selection. Click the Save button to commit changes.

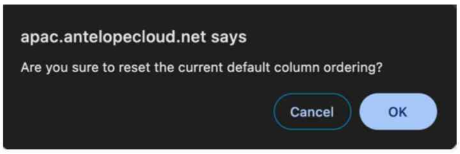


III. Reset Default Column

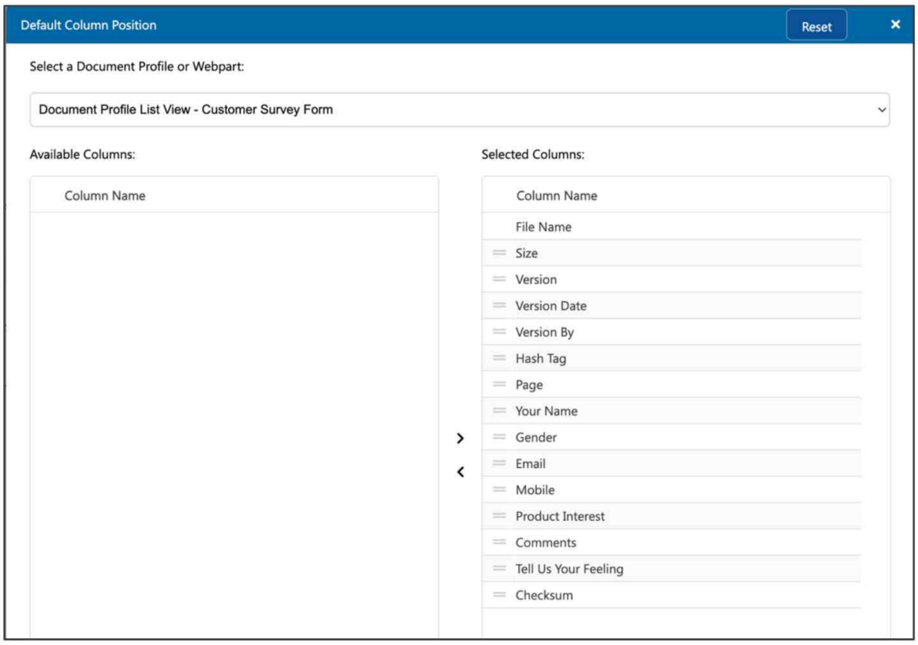
1. To reset all changes, click the “Reset” button.



2. Click the “OK” button to confirm.



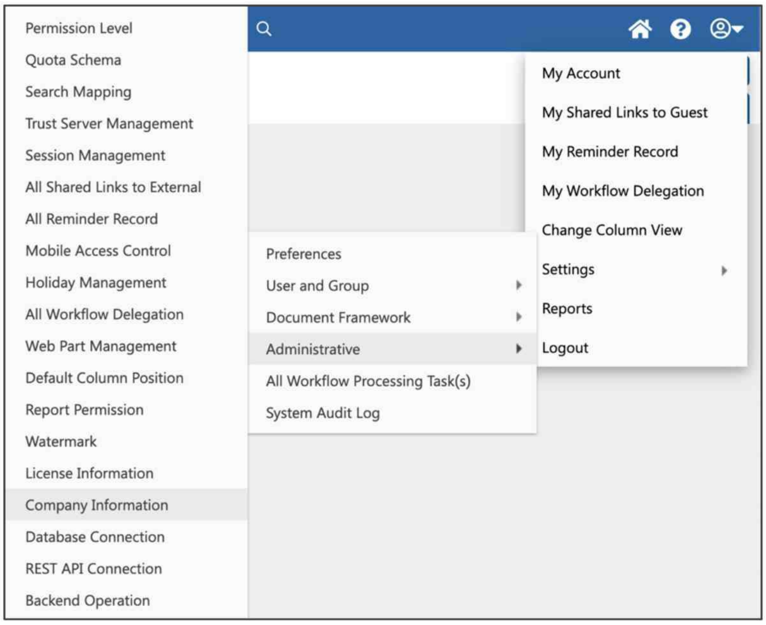
3. The default columns are reset to their original status.



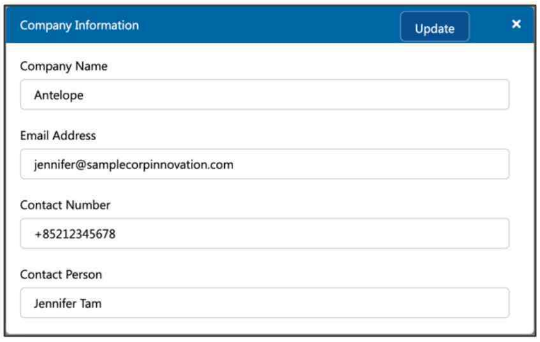
Y. Company Information

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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