

Antelope 6 Workspace User Manual

Created By Antelope International Limited Document No. A624001

Trademarks

The Antelope logo is a registered trademark of Antelope International Limited.

Antelope is a registered trademark of Antelope International Limited.

Microsoft, Windows and Windows Server are registered trademarks of Microsoft Corporation in the United States and/or other countries.

Apple, iOS, MacOS, Safari are registered trademarks of Apple Inc.

Android and Chrome is registered trademarks of Google.

Each company whose software title is mentioned in this manual has a Software License Agreement specific to its proprietary programs.

All other brand and product names mentioned in this User's Guide are registered trademarks of their respective companies.

© 2024 Antelope International Limited. All rights reserved.

Table of Contents

Α.		Login & Authentication7
١.		Login
П	•	Forget Password
В.		My Account 9
١.		Avatar9
II.	•	Password
II	I.	Signature10
C.		Dashboard12
١.		Dashboard mode and web part introduction
II.	•	Edit the dashboard14
Ш	Ι.	Add a new web part
IV	Ι.	Delete an existing web part
V.	•	Add a new web part to existing row19
v	1.	Enlarge an existing web part21
v	11.	Rename a web part24
•		
v	III.	Rename a tab
V D.	111.	Rename a tab 25 Searching 26
V D. I.	III.	Rename a tab25Searching26Name Search26
V D. I. II	III.	Rename a tab 25 Searching 26 Name Search 26 Full-Text Search 27
v D. I. II.	III. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28
V D. I. II. II.	111. 1.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30
V D. I. II. II. V.	III. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31
V D. II. II. V. V	. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32
V D. II. III V. V E.	111. I. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33
V D. I. II IV V E. I.	111. 1.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33My Check-Out33
V D. I. II IV V E. I. I.	III.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33My Check-Out33My Favorites34
V D. I. II II V. V E. I. II II	III. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33My Check-Out33My Favorites34My Clipboard35
V D. I. II II V. V E. I. II II II	III. I. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33My Check-Out33My Favorites34My Clipboard35Recent Open Documents35
V D. I. II. II. V. V E. I. II. II. V. V.	 III. I. I.	Rename a tab25Searching26Name Search26Full-Text Search27Advanced Search28Save Search Template30Load Search Template31Delete Search Template32Quick Access33My Check-Out33My Favorites34My Clipboard35Recent Open Documents35Personal Folder36

	Ι.	Create New Folder
	II.	Folder Type
	III.	Folder Naming by Rule
	IV.	Filter Owner
	V.	Major and Minor Version42
	VI.	Maximum Major Version / Maximum Minor Version
	VII.	Copy Index
	VIII.	Quota Schema
	IX.	Edit Folder
	Х.	Share Folder Link to Internal User
	XI.	Update Folder Thumbnail
	XII.	Delete Folder
G	•	Follow
	Ι.	Create New Follow
	II .	Follow Events
	III.	Tigger by Index Field
н	•	Permission
	Ι.	Assign Permission
	II.	Break Inherit
	III.	Restore Inherit
١.		Temporary Permission
	I.	Assign Temporary Permission
J.		Recycle Bin
	Ι.	Recycle Bin View
	II.	Folder Recycle Bin
K		Hyperlink
	I.	Create New Hyperlink
	II.	Edit Hyperlink61
	III.	Delete Hyperlink
L.		Calendar61
	Ι.	Create New Calendar61
	II.	Create Activity

II.	Edit Activity
	Document List
•	Document List and Thumbnail View
Ι.	Column Filter
II.	Export List
V.	Import List
Ι.	Change Column View
	Document
•	Upload Document
I.	Preview Document
II.	Index Field72
V.	Check-Out and Edit73
Ι.	Document Viewer Annotation74
/I.	Check-In and Unlock Document
/11.	Document Version
/111.	Mark and Revert Final Version
Х.	Minor Version Update
κ.	Publish Version
KI.	Update Thumbnail
KII.	Copy Document
KIII.	Copy and Paste Index
KIV.	Delete Document
KV.	Move Document
VI.	Add Attachment
VII.	View Attachment
⟨VIII.	Add to My Clipboard
	Document Relation
•	Copy Link
I.	Link Relation
II.	Group Document
	Route Document
•	Create New Routing
	II. I. I. I. I. I. I. I. I. I.

Q.	Sharing	
١.	Share to Internal	96
П.	Share to Guest	97
III.	My Shared Links to External	
R.	Reminder	
١.	Create New Reminder	
П.	My Reminder Record	100
S.	Compare	101
١.	Text Compare	101
Т.	Document Audit Log	
١.	Document Audit Log	

A. Login & Authentication

I. Login

- 1. Antelope 6 Cloud supports the following types of login authentication:
 - a. Simple username and password input.
- 2. Input the username and password.

antelope Coud Version	
Sign in For your protection, please provide your identity	
admin Password*	Ξ.
Language English	
SIGN IN TO MY ACCOUNT	
Forgot Password Antelope 6 Al Genie Version 6	

- 3. Select the language. Currently Antelope supports English, Traditional Chinese, Simplified Chinese and Portuguese.
- 4. Click "Remember Me" if you want the browser to remember your username.
- 5. Click "SIGN IN TO MY ACCOUNT" button. By default, if you attempt login fail for more than 10 times, system will lock your account for 30 minutes. The number of fail attempt will vary according to system administrator setup.

II. Forget Password

1. If you forget your user account password, click the "Forget Password" link on the bottom of the login page.

Forgot Pa	assword
To safeguard your account, we will send you a email.	a link for changing your password by
Please enter your registered email address:	
SEND	ВАСК

- 2. Input the email address which is associated with your user account.
- 3. Click "Send" button.
- 4. You will receive an email about resetting password for your Antelope user account. Click the hyperlink embedded in the email.
- 5. Input your new password.
- 6. Click the "Change" button.
- 7. You can now login again with your new password.

B. My Account

I. Avatar

1. From the top right-handed corner, click the user icon.



- 2. The context menu will appear. Select "My Account".
- 3. To change your profile picture, click the circle icon from Avatar.

My Account		Update) ×
Password and Signature	Others		
A			
Avatar			
JI			

- 4. From the Upload Document pop-up window, click the "Choose File" button.
- 5. Select your profile picture. Antelope only supports JPG and PNG format. It is recommended the profile picture should be under 500 x 500 pixels resolutions.
- 6. Click the "Upload" button.

II. Password

1. To update password, Input your current one from "Password".

Password		
New Password		
Confirm Password		

- 2. Input your new password and confirm password. All passwords must follow the rules below:
 - Password length with a minimum of 8 characters
 - At least 1 upper case letter, 1 lower case letter, 1 numeric letter and 1 symbol.

III. Signature

1. Click the grey Signature area.



2. The "Add Signature" window will appear.



3. There are three options for defining your signature:

Option	Description
Draw	Draw your signature by pointing device such as mouse.
Туре	Type your signature with a selection of cursive fonts.
Upload	Upload your signature file in either JPG or PNG format.

- 4. Click the "Clear" hyperlink to clear your signature.
- 5. Click the "Upload" button to save your signature.

C. Dashboard

I. Dashboard mode and web part introduction

The Antelope dashboard simplifies the retrieval of necessary information and provides a comprehensive overview of all your processes.

1. If you are the first-time login into the system, you will see two webparts displayed in the dashboard: Workflow Inbox and Workflow Outbox. This is the "Normal" mode, in which all web parts are displayed in a single page.

≡ ⊜	Name ~ Keywo	rd Search	х Q	ļ	*	8	@-
Home							Ŷ
Folders	Dashboard				Personal	~	1
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder Agreements Bill of Lading Correspondence Letter HR Invoices IT 	Workflow Inbox	Workflow No.	Sent on	Received On	Task Name	G atus	8 [1] 8
Marketing Personal Folders Projects Sales Reports Advanced Search Workflow Applications						1	[1]

2. At the top right-handed corner, there is a "Personal" pull-down list which allows you to select different dashboards.



3. The pull-down list includes what user group(s) you belongs to. In this example, you also belongs to Marketing (MKT) user group, which has its own dashboard.



4. Select the Marketing option (or user group which your account belongs to). This will display another dashboard. Different dashboard may have different setting and configuration, please consult your system or departmental administrator.

≡ ⓐ	Name V Keyword Search	×Q	☆ 3 ®•
Home			Ţ
Folders	Project Dashboard Workflow Template Work	kflow Inbox 🧿 Workflow Outbox	MKT ~
✓ ℱ Quick Access	Project Dashboard		
My Check Out My Favorites My Clipboard Recent Open Documents Description	4 Tasks Overdue in 2 Weeks 3 Total Prniects	day 1 Tasks Due Tomorrow Tasks	Past Due
Home			
> 🗋 Agreements	Linnovate	Project Module Development	SampleCorp
Bill of Lading Correspondence Letter	O No task due in 2 Weeks	 5 tasks due in 2 weeks 3 tasks past due 	S No task due in 2 We
> HR > Invoices	A		00100
» 🗀 п			
> 🗋 Marketing	Tasks due in 2 Weeks	No. of Tas	ks Due in 2 Weeks
> D Personal Folders	Project Name Task Own	ner(s) E	
Advanced Search			
Workflow Applications	Linnovate admin		
System			

5. Depends on your access permission, if you do not have rights to modify your user group dashboard, you won't able to see the blue edit button on the right-handed side, as below:-

МКТ	~	MKT	~	1
No access permissio	NP .	Access permission	granted	

No access permission

Access permission granted

II. Edit the dashboard

1. To edit your current dashboard, click the top right-handed side blue button.



2. Your dashboard will change into edit mode.

≡ 🧿	Name V Keyword Search × Q 🛠 🖓 🛞 🗸
Home	Ç <u>P</u>
Folders	Normal v Personal v 🖬
V F Quick Access	Workflow Inbox
My Check Out My Favorites My Clipboard Recent Open Documents	Workflow Inbox [1x1]
 ☐ Personal Folder ✓ ☐ Home 	Workflow Outbox
Agreements Bill of Lading	Workflow Outbox
Correspondence Letter HR	[1x1]
> [] Invoices > [] Π	
> D Marketing	۲

3. The blue pencil button will change into save button.



4. There are three dashboard modes for you to select: Normal, Horizontal Tab and Vertical Tab. Select "Horizontal Tab" from the top left-handed corner pull-down list.

≡ (3)	Name 🗸 Keyword Search	×Q	A 3 🛛
Home			Ŷ
Folders	✓ Normal		Personal
✓ ➡ Quick Access	Horizontal Tab Vertical Tab		
My Check Out			
My Favorites		and from taking	
My Clipboard		Workflow Inbox	
② Recent Open Documents		[1×1]	
Personal Folder	L		
✓ → Home	Workflow Outbox		
> C Agreements	WORNOW COLDOX		
> D Bill of Lading			
> Correspondence Letter		Workflow Outbox	
> 🗀 HR		[1×1]	
> 🗋 Invoices			
> 🗀 п			
> 🗋 Marketing		\odot	
> D Personal Folders			

5. Click the blue save button to commit changes.



6. The dashboard will change into horizontal tab mode.

≡ 🗿	Name - Keywo	ord Search	×Q	*	? ® -
Home					Ŷ
Folders	Workflow Inbox 0	Workflow Outbox		Personal	~ 🖉
✓ IF Quick Access	Workflow Inbox				ß
My Check Out	۲.	Workflow No.	Received On	Task Name	
A My Favorites					
My Clipboard					
② Recent Open Documents					
Personal Folder					
✓ → Home					
> C Agreements					
> D Bill of Lading					
> Correspondence Letter					
> 🗋 HR					
> 🗋 Invoices					
> 🗅 п					
> 🗋 Marketing					
> D Personal Folders					
Advanced Search					
Workflow Applications	-				
System					[1]

7. For vertical tab mode, all web part tabs will align to the left-handed side of the screen.

≡ ⓐ	Name - Keyword Se	arch	×Q	☆ 3	@-
Home					Ŷ
Folders	Personal ~	Workflow Inbox			ľ
✓ I Quick Access	Workflow Inbox 0	► Workflow N	0.	Received	Dn
My Check Out					
My Favorites	Workflow Outbox				
My Clipboard					
Ø Recent Open Documents					
Personal Folder					
✓ ☐ Home					
> 🗋 Agreements					
> D Bill of Lading					
> 🗋 Correspondence Letter					
> 🗋 HR					
> 🗋 Invoices					
> 🗀 п					
> 🗋 Marketing					
> D Personal Folders					
Advanced Search					
Workflow Applications			þ.		(1)
System					[1]

III. Add a new web part

1. Change the dashboard into edit-mode.

≡ ⓐ	Name 🗸 Keyword Search 🗙 Q 🔗	· ? ©-
Home		Ŷ
Folders	Horizontal Tab 🗸 Personal	~ 🕞
Vick Access My Check Out	Workflow Inbox	
My Favorites My Clipboard Recent Open Documents Personal Folder	Workflow Inbox [1x1]	
✓ → Home Agreements	Workflow Outbox	
Bill of Lading Correspondence Letter HR Invoices	Workflow Outbox [1×1]	
> □ IT Marketing Personal Folders	۲	
Advanced Search Workflow Applications System		

2. Click the rounded add button from the bottom.

Workflow Outbox [1x1]	
Ð	

3. The "Add Web Part" window will appear.

4. Use the following setting:

Add Web Part	Add	×
Add to row		
New Row		~
Туре		
Notifications (MySubList)		~
Height		
1X		~
Width		
1X		~

- 5. Click "Add" button to commit changes.
- 6. The "Add Web Part" window will be closed.
- 7. The dashboard is still in edit-mode, click the blue save button from the top righthanded corner to commit changes.

≡ ⓐ	Name Y Keyword Search	× Q	😤 😯 🙁
Home			(P
Folders	Horizontal Tab		Personal - 🕞
 Quick Access My Check Out My Favorites My Clipboard 	Workflow Inbox	Workflow Inbox	
Recent Open Documents Personal Folder			
 La Home Account Agreements Correspondence Letter Human Resources Information Technology 	Workflow Outbox	Workflow Outbox [1x1]	
> 🗋 Library > 🗋 Management	Notifications		
Marketing Office Administration Personal Folders		Notifications [1x1]	
Advanced Search Workflow Applications		۵	

8. A new web part is added to your dashboard.

Workflow Ir	nbox 🧿	Workflow Outbox	Notifications
Notification	15		
Status	Туре	File Name	Owner

IV. Delete an existing web part

1. Change the dashboard into edit-mode.

≡ ⓐ	Name Y Keyword Search	×Q	* 0 ®•
Home			Ģ
Folders	Horizontal Tab 🛛 🗸		Personal V
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents 	Workflow Inbox	Workflow Inbox. [1x1]	
	Workflow Outbox	Workflow Outbox [1×1]	
Library Management	Notifications		
Marketing Office Administration Personal Folders Advanced Search		Notifications [1×1]	
Workflow Applications System		۲	

- 2. Move the mouse cursor to Notifications webpart.
- 3. Click the rounded cross icon.



4. The web part is deleted.

≡ ⓐ	Name Y Keyword Search	× Q	A 3 🛛
Home			Ţ
Folders	Horizontal Tab ~		Personal 🗸 🕞
V 💽 Quick Access	Workflow Inbox		
a) My Check Out b) My Favorites b) My Floworites b) My Clipboard c) Recent Open Documents b) Re		Workflow Inbox [1x1]	
 Home 	Workflow Outbox		
		Workflow Outbox [1x1]	
Library Management Marketing		۲	

V. Add a new web part to existing row

1. Change the dashboard into edit-mode.

≡ ⓐ	Name 👻 Keyword Search	×Q	* 0 ® -
Home			(P
Folders	Horizontal Tab		Personal 🗸 🖬
 Quick Access My Check Out My Favorites My Clipboard 	Workflow Inbox	Workflow Inbox	
 Recent Open Documents Personal Folder 		(ana)	
Home Account	Workflow Outbox		
Agreements Correspondence Letter		Workflow Outbox	
Human Resources Information Technology		[1x1]	
		۲	
Office Administration Personal Folders	1		
Advanced Search Workflow Applications			
System			

- 2. Move the mouse cursor to Workflow Inbox webpart.
- 3. Click the rounded add icon.

\oplus	Workflow Inbox	Ø
	[1x1]	

4. The "Add Web Part" window will appear, use the following setting:

Add Web Part	Add	×
Add to row		
Workflow Inbox		~
Туре		
Recently Accessed (Access)		~
Height		
1X		~
Width		
1X		~

5. Click the "Add" button to commit changes.

6. The "Recent Accessed" web part is added in front of Workflow Inbox web part.

≡ ⓐ	Name V Keyword Search X Q	* 6) @ -
Home			Ŷ
Folders	Horizontal Tab V	Personal	~
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder 	Recently Accessed Workflow Inbox [1x1] [1x1] [1x1]		
	Workflow Outbox [1x1]		
Cibrary Management Marketing	۲		
Office Administration Personal Folders			
Advanced Search Workflow Applications System			

7. Click the blue save button from the top right-handed corner to commit changes.

≡ ⓐ			Name V Keyword Search			× Q		*	8	
Home										Ç
Folders	Recent	tly Acc	essed Workflow Outbox					Personal	~	1
✓ ➡ Quick Access	Recen	tly Acc	essed		ľ	Workflow Inbox				ß
My Check Out			File Name		Modified Date	*	Workflow No.			
My Favorites	Û		Legal Matters	•	2024-05-22 15:00					
My Clipboard	Û		Correspondence Letters		2024-05-22 15:00					
Recent Open Documents	Û		Draft Documents	-	2024-05-22 15:00					
Personal Folder	Û		Organisation Charts		2024-05-22 15:00					
✓ → Home	Û		Company Registries		2024-05-22 14:59					
> 🗋 Account	ŵ		Agreements		2024-05-22 14:59					
Agreements Gerrerpondence Letter	印		Management		2024-05-22 14:58					
> T Human Resources	ŵ	-	Supplier List		2024-05-22 14:58					
> 🗋 Information Technology	<u>م</u>	0	Letter Head		2024 05 22 14.50					
> 🗋 Library	~	0	Letter Head	•	2024-05-22 14:58					
> 🗋 Management			Floor Plan	•	2024-05-22 14:58					
> 🗋 Marketing			CCTV Diagram	•	2024-05-22 14:58					
> D Office Administration	Û		Fire Drill & Exhauster	٠	2024-05-22 14:58					
> D Personal Folders	Û		Office Administration	•	2024-05-22 14:57					
Advanced Search	۵		Server & Network Diagrams	٠	2024-05-22 14:55					
Workflow Applications	Û		IT Suppliers	•	2024-05-22 14:55					
System	-					l				<u> </u>

VI. Enlarge an existing web part

1. Change the dashboard into edit-mode.

≡ ⓐ	Name V Keyword Search	×Q	A 9 🛛
Home			Ŷ
Folders	Horizontal Tab 🗸		Personal 🗸 🕞
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents 	Recently Accessed Recently Accessed [1x1]	v	Vorkflow Inbox [1x1]
Personal Folder Home Account	Workflow Outbox		
Agreements Correspondence Letter Human Resources Information Technology		Workflow Outbox [1x1]	
Library Management Marketing		۲	
Office Administration Office Administration Personal Folders Advanced Search Workflow Applications			
System			

2. To enlarge the width of an existing web part, click the first arrow icon.



3. The web part width is enlarged with a ratio of $[2 \times 1]$.

Recently Accessed		
	Recently Accessed	Workflow Inbox
	[2x1]	[1x1]

4. Click the first arrow icon again to enlarge further with a ratio of $[3 \times 1]$.



5. When the width of the web part reaches a ratio of [4 x 1], the remaining web part will move to the next row.

≡ ⓐ	Name V Keyword Search X Q	☆ ? ® -
Home		Ŷ
Folders	Horizontal Tab 🗸 🗸	Personal ~
∽ 🗿 Quick Access	Recently Accessed	
👜 My Check Out 화 My Favorites	Recently Accessed	Workflow Inbox
My Clipboard	[3x1]	[1x1]
Personal Folder		
✓ ☐ Home	Workflow Outbox	
	Workflow Outbox [1x1]	
Amontación rechitology Library Management Marketing	۲	

Recently Accessed at [3 x 1] ratio

≡ 🔒	Name V Keyword Search X Q	*	? ⊗ -
Home			Ŷ
Folders	Horizontal Tab 🛛 🗸	Personal	~ 🔒
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder 	Recently Accessed [4x1]		
	Workflow Inbox [1x1]		
Human Resources Information Technology Library Management Marketing Office Administration Personal Folders	Workflow Outbox Workflow Outbox [1x1]		
Advanced Search Workflow Applications System	⊕		

Recently Accessed at [4 x 1] ratio

6. To shrink the ratio, click the left arrow icon.

Ð	Recer	ntly Acc	essed	8
		[4x1]		
	I←	$\overline{\mathbf{v}}$	\rightarrow	

7. Similarly, to enlarge the height of the web part, click the down arrow.



8. The web part height is enlarged.

≡ (a)	Name V Keyword	Search	× Q	* 9 ®•
Home				Ŷ
Folders	Horizontal Tab			Personal 🗸 🖬
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder 	Recently Accessed	Recently Accessed [3x2]		Workflow Inbox [1×1]
> D Information Technology	Workflow Outbox			
		Workflow Outt [1x1]	хос	
Advanced Search Workflow Applications System		۲		

9. To move the web part to the right, click the right arrow on the most right.



10. This will interchange the position between two web parts.

Home Personal Image: Constraint of the co	≡ (3)	Name V Keyword Search	× Q	* 0 ®•
Folders Horizontal Tab Personal Color	Home			Ŷ
Quick Access My Check Out My Spavrites My Clipboard Recent Open Documents Personal Folder Account Agreements Agreements Correspondence Letter Human Resources Information Technology Information Technology Workflow Outbox Workflow Outbox Itary Management Marketing Office Administration Personal Folders	Folders	Horizontal Tab ~		Personal ~
Human Resources Information Technology: Workflow Outbox Library Management: Marketing Office Administration Personal Folders	 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder Carl Personal Folder Account Agreements Correspondence Letter 	Workflow Inbox Workflow Inbox [1x1]	Recently Accessed [3x2]	
> Office Administration [[x1] > Personal Folders	Human Resources Information Technology Library Management Marketing	Workflow Outbox	Workflow Outbox	
Workflow Applications	Coffice Administration Personal Folders Advanced Search Workflow Applications		أتحتا	

VII. Rename a web part

1. To rename a web part, click the web part name.



2. Input the new name of the web part.



3. Click the blue save button from the top right-handed corner to commit changes.



VIII. Rename a tab

1. To rename a tab, click the tab name.

≡ ⓐ	Name 👻 Keyword Search	× Q	A 0 0-
Home			Ę
Folders	Horizontal Tab ~		Personal - 🕞
 Quick Access My Check Out My Favorites My Clipboard Recent Open Documents Personal Folder 	Workflow Inbox	Workflow Inbox [1x1]	
	Workflow Outbox	Workflow Outbox [1x1]	
Cibrary Management Marketing		۲	
Control office Administration Control of the Advanced Search Control of the Applications System Control of the Applications Control of the Ap			

2. Input the new name of the tab.

Horizontal Tab 🛛 🗸	
My Process	
	Workflow Inbox
	[1x1]

3. Click the blue save button from the top right-handed corner to commit changes.



D. Searching

3.

I. Name Search

1. To search for folder and document name, select the folder which you want to search. For example, if you want to search for the entire folder tree, you should select the root folder (e.g. Home).

≡ ⓐ	Name V Keyword Search X Q	*	8	@•
Home				Ģ
Folders	Workflow Template Workflow Inbox 0 Workflow Outbox Personal	,	-	1
✓ ☞ Quick Access	Workflow Template			
My Check Out	Type here to filter template			
My Favorites				
My Clipboard	Information Technology			
② Recent Open Documents	Human Resources			
Personal Folder				
✓ → Home				
> C Agreements				
> D Bill of Lading				
> 🗋 Correspondence Letter	Request for Salary Proof			
> 🗀 HR	Letter			
> 🗋 Invoices				
> С п				
> D Marketing				
> Personal Folders				
Advanced Search				
Workflow Applications	All Staffs			
System	Account & Finance			

2. From the top blue bar, select "Name" as search type.

✓ Name	Keyword Search	×	Q
Content			
nput the search ke	yword (e.g. agreement).		



4. Press "Enter" or click the search icon.

≡ 🔋	Name ~	agreement	×Q	🛪 😗 🔍
Home				Ģ
Folders	Index 🗸 🗎			C ^I < 1 to 5 (Page 1) ~ >
Advanced Search		File Name	Size Ve	ersion Version Date Version By
Q 5 A .		🏠 📃 🖕 Agreement Signing Sch	edule	1.0 2024-05-07 11:17:59
Cross Profile		☆ 📒 🖕 Agreements		2024-04-04 12:05:04
Folder Path		🏠 💼 👻 Real Estate Purchase Ag	greement.pdf 227 KB	1.0 2024-04-04 12:05:08 Administrator
Home		🏠 💼 👻 Residential Lease Agree	ement.pdf 106 KB	1.0 2024-04-04 12:20:33 Administrator
Document Content		ය 💼 🗸 Sample Purchase Agree	ment.pdf 116 KB	1.0 2024-04-05 15:57:07 Jennifer Tam
Document Profile General File Name				
+ and				
Search Results				
Workflow Applications System				

5. The search result will display, click the hyperlink to open the objects.

Note: Name Search does not support folders under "Quick Access".

II. Full-Text Search

- To search documents by its content, select the folder which you want to search. For example, if you want to search for the Agreement folder, you should select it before searching (e.g. Home\Demo Purpose\Agreements & Contracts).
- 2. From the top blue bar, select "Content" as search type.



4. Press "Enter" or click the search icon.

5. The search result will display, click the hyperlink to open the objects.



III. Advanced Search

1. Advanced search, or index search, is for searching documents according to their document profiles and index fields. Click the "Advanced Search" tab on the left-hand side column.

≡ (a)		Name ~	Keyword Search		×q		A 0	@ •
Home > Account > Invoices							[Ŷ
Folders	+ New \sim	→ Upload	Index \checkmark View \checkmark	Edit Columns	Recycle Bin	G	< 1 to 5 (Page 1)	~ >
Advanced Search			File Name	Size Version	Version Date	Version By	Hash Tag	Invoice I
Q 5 .		☆ 💼	 INV24001.pdf 	200 KB 2.0	2024-05-22 12:34:31	DSO		INV2400
Cross Profile		습 💼	 INV24002.pdf 	205 KB 2.0	2024-05-22 12:33:44	DSO	#SampleCorp #PO123	INV2400
Folder Path		습 📩	 INV24003.pdf 	205 KB 2.0	2024-05-22 12:33:50	DSO		INV2400
Home\Account\Invoices		12 💼	 INV24004.pdf 	191 KB 2.0	2024-05-22 12:34:46	DSO		INV2400
Document Content		☆ 💼	 INV24005.pdf 	205 KB 2.0	2024-05-22 12:33:57	DSO		INV2400
Document Profile								
Invoices								
File Name v like v »								
+ and ~								

2. The "Folder Path" and "Document Profile" is already selected for you.

Home\Account\l	nvoices	
Document Conte	ent	
Document Profil	е	
Invoices		~
File Name	~ like	~ »
File Name	~ like	~

3. For example, if you want to search all invoices within June 2024, select "Invoice Date >= 2024-06-01".

Invoice Date	~	>=	~ >
2024-06-01			

 Click the add button [+] to add another search field, select "Invoice Date <= 2024-06-30".

Invoices				~
Invoice Date	~	>=	~	>>
2024-06-01				
-		and		~
Invoice Date	~	<=	~	»

5. Finally click the search icon to perform the advanced search.



6. The search result will display on the document list panel.

≡ ⓐ		Name	~	Keyword Sea	arch			× Q					* 6) @ -
Home > Account > Invoices														Ŷ
Folders	Index \smallsetminus	3								G	<	1 to 1	(Page 1)	~ >
Advanced Search				File	Name	Size	Versior	Version Date	Version By		Has	h Tag		Invoice N
Q D 4 .				- INV24	005.pdf	205 K	B 2.0	0 2024-05-22 12:33:57	DSO					INV24005
Folder Path														
Home\Account\Invoices														
Document Content														
Document Profile														
Invoices														

IV. Save Search Template

1. After you perform an advanced searching, your search setting will be listed at the bottom of the panel.

Inv	oice Date	~ <=	~ »
202	24-06-30		
+	-	and	~
Sea	rch Results		
	Invoice Date >	= 2024-06-0	1 a
	Invoice Date >	= 2024-06-0	1 a

- 2. To save your search setting for future use, click the flag icon. $\hfill\square$
- 3. The "Save Search Template" window will appear. Input a "Template Name" for your search template.

Save Search Template	Save	×
Template Name Invoice within June 2024		
Personal		
Shared		

4. If you want to save the search template for personal use, select the "Personal" checkbox.



5. If you want to share your search template to other users, select the "Shared" checkbox, and then select the folder you want to save in.

Save Search Template	Save) ×
Template Name		
Invoice within June 2024		
Personal		
Shared		
Folder Path		
Home\Account\Invoices		

6. Note: If you do not save your search template, once you refresh the web browser screen, all your search history will be cleared.

V. Load Search Template

1. Once your personal search template is saved, it will appear in the Advanced Search panel.



For shared search template, go to the folder that you saved the template.



2. Click the template "Invoice within June 2024" to load your search template.

3. Antelope will perform the search result for you.

≡ (3)		Name 🗸	Keyword Search	×q		☆ ? ® •
Home						Ç
Folders	T Upload	Index \smallsetminus	1		C <	1 to 1 (Page 1) ~ >
Advanced Search			File Name	Size Version Version Date	Hash Tag Ver	sion By
		û 📩	 INV24005.pdf 	205 KB 2.0 2024-05-22 12:33:57	#DSO	INV24005
Folder Path						
Home\Account\Invoices						
Document Content						
Document Profile						
Invoices ~						
File Name v like v »						
+ and ~						
Search Template						
× Invoice within June 2024	ļ					

VI. Delete Search Template

1. To delete the personal search template, click the cross icon.



To delete the shared search template, right-click to bring up the context menu, select More > Delete.

Ninvoice v	More	•	Temporary Permission
			Delete
			Permission
		12	1

- 2. A confirmation message "Are you sure to delete?" will appear.
- 3. Click "Confirm" to delete the search template.

E. Quick Access

I. My Check-Out

1. Under "Quick Access \ My Check Out", the folder lists out all your check-out documents.

≡ 🗿	Nam	ne 🗸 Keyword	Search	× Q		* 9 ®•
Quick Access > My Check Out						Ŷ
Folders	View 🗸 🗄	6			C' < 1t	o 3 (Page 1) 🛛 🗸 🗦
✓ ➡ Quick Access			[†] File Name	Size Check Out On	Version Version Date	Version By
My Check Out		☆ 📩 🗸	INV24001.pdf	152 KB 2024-09	9- 1.0 2024-08-31 15:57:39	Jennifer Tam
My Ravontes		습 🚾 🗸	Non-disclosure agreement.docx	85 KB 2024-09	2.0 2024-09-01 01:33:34	Jennifer Tam
Recent Open Documents Personal Folder		☆ 📄 🗸	Residential Lease Agreement.pdf	106 KB 2024-09	1.0 2024-06-28 13:28:21	Antelope
> 🕞 Home						

2. Click the document link to open for preview.



3. You can preview the document by the document viewer.



4. To unlock the document, right-click to bring up the context menu, select "Edit > Unlock".

+ New \sim	View $ \smallsetminus $	þo							G	<
□ ▼			File Name		Size		Check Out On	Version	Versio	on Date
	☆ 👦	-	INV24001.pd	f	152	KB	2024-09-	1.0	2024-	08-31 1
	습 🛄	-	Non-disclo	Preview		٢B	2024-09-	2.0	2024-	09-01 0
	습 📷	•	Residential	Edit	+	~	Check Ou	t & Edit	2024	06-28 1
				Add to My Clipboard Relation Route Document	*		Download Upload Convert Te	D PDF		
				Reminder Compare	×		Unlock Update Th Add Attac	numbnail hment		
				History	- F	T				

II. My Favorites

1. You can click the "Star" icon to mark any objects as favorites, including document, calendar, hyperlink, folder and workflow records.

+ New \vee	↑ Upload	Index 🗸 View	v 🗸 Change C	olumn View Recycle Bin	þ
		File Name	Size Versio	n Version Date	Version By
	습 📩	- 329509.pdf	129 KB	1.0 2024-09-01 14:19:05	Jennifer Tam
	*	- 329510.pdf	125 KB	1.0 2024-09-01 14:19:05	Jennifer Tam
	값 💼	- 329511.pdf	145 KB	1.0 2024-09-01 14:19:05	Jennifer Tam
	값 📩	- 329512.pdf	123 KB	2.0 2024-09-01 14:19:08	Jennifer Tam
	☆ 📩	- 329513.pdf	122 KB	1.0 2024-09-01 14:19:05	Jennifer Tam

2. To view all marked favorites objects, go to "Quick Access \ My Favorites".

≡ ⓐ		Name 👻	Keyword S	earch) × Q				* (? @ -
Quick Access > My Favorites												Ţ
Folders	View 🗸 💿								G	<	1 to 1 (Page 1) ~ >
✓		1 Fi	le Name	Size	Version	Version Date	Version By	Folder Path				
My Check Out	🗆 \star 🖥	- 329	510.pdf	125 KB	1.0	2024-09-01 14:19:05	Jennifer Tam	Home\Samples\	Accountin	ng\Invo	ices	
My Favorites												
My Clipboard												
Recent Open Documents												
Personal Folder												

3. Click the "Star" icon again to remove from favorites.

View $$	bo					
		File Name	Size	Version	Version Date	Version By
	☆ 🛼 🗸	329510.pdf	125 KB	1.0	2024-09-01 14:19:05	Jennifer Tam

III. My Clipboard

1. To add a document to clipboard, select the document, right click to bring up the context menu, then select "Add to My Clipboard".



2. You can add multiple documents to clipboard.

≡ ⓐ			Na	me 🖌 Keyword Sea	irch		×	a a				*	?
Quick Access > My Clipboard													Ŷ
Folders	1									C	<	1 to 2 (Page	ə1) ~ >
✓				File Name	Size	Version	Version Date	Version By	Folder Path	e.			
My Check Out		0		INV24001.pdf	152 KB	1.0	2024-08-31 15:57:39	Jennifer Tam	Home\Sam	ples\Acc	ountin	g\Invoice (20	24)
My Favorites			1	Sample.pptx	687 KB	1.0	2024-08-31 12:34:55	Antelope	Home\QC F	Profile A	(Cojacl	c)	
My Clipboard													
Recent Open Documents													
Personal Folder													

Note: My Clipboard only stores documents temporarily, like search history. It will be cleared once you refresh your page or log out.

IV. Recent Open Documents

1. Recent Open Documents display all your recently preview documents.

≡ ⓐ				Na	me 🖌 Keyword Search		× Q		* 0 ®•
Quick Access > Recent Open Documents									Ç
Folders	8								C^{l} ${}^{<}$ 1 to 14 (Page 1) ${}^{\vee}$ ${}^{>}$
✓ ➡ Quick Access					File Name	Size	Version Version Date	e Version By	Folder Path
My Check Out			☆	-	329512.pdf	123 KB	2.0 2024-09-01 1	L4:19:08 Jennifer Tam	Home\Samples\Accounting\Invoices
My Favorites				-	329513.pdf	122 KB	1.0 2024-09-01 1	L4:19:05 Jennifer Tam	Home\Samples\Accounting\Invoices
My Clipboard			습		329509.pdf	129 KB	1.0 2024-09-01 1	14:19:05 Jennifer Tam	Home\Samples\Accounting\Invoices
Recent Open Documents			☆	-	329511.pdf	145 KB	1.0 2024-09-01 1	L4:19:05 Jennifer Tam	Home\Samples\Accounting\Invoices
Personal Folder				<u>.</u>	329510.pdf	125 KB	1.0 2024-09-01 1	14:19:05 Jennifer Tam	Home\Samples\Accounting\Invoices
			☆	w .	Non-disclosure agreement.docx	85 KB	2.0 2024-09-01 0	01:33:34 Jennifer Tam	Home\Samples\Agreements
> La Home		6	☆	÷ .	INV24001.pdf	152 KB	1.0 2024-08-31 1	L5:57:39 Jennifer Tam	Home\Samples\Accounting\Invoice (202
		6	습	-	Residential Lease Agreement.pdf	106 KB	1.0 2024-06-28 1	L3:28:21 Antelope	Home\Samples\Agreements
			습	w .	Sample Purchase Agreement.docx	89 KB	2.0 2024-09-01 0	01:16:25 Jennifer Tam	Home\Samples\Agreements
				-	PO-150001.pdf	124 KB	1.0 2024-07-08 1	L1:35:14 Antelope	Home\Samples\Accounting\Purchase Or
			☆	w .	Word.doc	24 KB	1.0 2024-08-31 1	L3:43:27 Antelope	Home\Doc Type Preview Test
			☆	۹.	PowerPoint.ppt	3 MB	1.0 2024-08-31 1	L3:44:15 Antelope	Home\Doc Type Preview Test
			습	×	2023 年月度保留销售总结报告.xlsx	22 KB	1.0 2024-08-31 1	L2:33:22 Antelope	Home\QC Profile A (CJK)
			☆	.	Word.rtf	46 KB	1.0 2024-08-31 1	L3:43:27 Antelope	Home\Doc Type Preview Test

2. It will show the most recent 50 documents.

V. Personal Folder

1. Personal folder contains all tasks and documents you have been working on personally.

≡ (3)		Name V Keyword Search			× Q	,			*	9 @ -
Quick Access > Personal Folder										Ŷ
Folders	+ New V T Upload	View 🗸 🔛					C	<	1 to 4 (Page 1) ~ >
~ 💽 Quick Access		File Name	Size	Version	Version Date	Version By				
My Check Out	🗆 🕁 🚾	 Antelope 6 GENIE AI script 3.0.docx 	20 KB	1.0	2024-09-11 09:49:15	Antelope				
My Favorites	🗆 🔹 🕵	Legal Industry Solution v1.2d.pptx	31 MB	1.0	2024-09-11 09:50:01	Antelope				
My Clipboard	🗋 📩 🏧	 Pic3.png 	346 KB	1.0	2024-09-11 09:48:23	Antelope				
Ø Recent Open Documents	🗌 🗠 🚾	 update exist template guide.docx 	13 KB	1.0	2024-06-21 16:54:01	Antelope				
Personal Folder										
Arbanned Search										
Advanced Search										
worknow Applications										
System										

F. Folder

I. Create New Folder

- 1. To create a new folder, select a location from the folder tree. For example, the Marketing folder.
- 2. From the "New" pull-down menu, select "Folder".


3. The "New Folder" window will appear.

New Folder		Update	×
General Advance D	efault Access		
Document Profile			
General			~
Folder Name			
Description			
Folder Type			
Normal			~
Default eForm			
			~]
Sort Field			
Default			~
Sort A-Z			

4. Choose the "Document Profile", which defines what meta-data are stored in your document profile. For example, Marketing Event.

New Folder	Update	×
General Advance		
Document Profile		
Marketing Events		~

5. Input the folder name "Events and Seminars".

Events and Seminars	

6. Input the description "Marketing events and seminars." This is an optional field; you may skip that if you do not need any description.



7. Click "Update" button to commit changes.

8. A new folder "Events and Seminars" is created.



 By default, the folder description is not show in the document list. To show the description field, select "Settings > Preference". Please contact your system administrator to proceed with this action.

Q	☆ 3 ®•
B C	My Account My Shared Links to Guest
łash Tag Version By	My Reminder Record My Workflow Delegation
Preferences User and Group Document Framework Administrative	Settings Reports Logout
All Workflow Processing Task(s) System Audit Log	

10. In the Preference window, enable "Show Description" and update the setting.

Preferences	Update	×
Document List Folder Tree		
Number of documents display per page		
100		~
Send document link		
Popup email client		~
Show Description		
Show Created date		
Show Page Count		
Split at Name Column		

II. Folder Type

1. There are three types of folders:

Folder Type	Description
Normal	Electronic documents, by default the folder is in list view.
Album	Photos and images, by default the folder is in thumbnail view.
eForm	eForm, by default the folder is in list view.

2. If eForm folder type is selected, you are required to select the default eForm template to use.

New Folder	Update	×
General Advance		
Document Profile		
Employee Profile		~
Folder Name		
Employee Profile		
Description		
Folder Type		
EForm		~
Default eForm		
Employee Profile.rft		Ý

3. Under this folder type, you can create new eForm records by simply adding a new form from the "New" pull-down list in the folder.



4. Fill-in the eForm and then click "Save" button to commit changes.

Note: You can try on the sample folder "Home\Samples\Human Resources\Employee Profile"

III. Folder Naming by Rule

1. Rule is the document auto naming sequence. You can select an auto naming rule for any documents upload to this folder.

Edit		Update	×
General	Advance		
Rule			
Employee	Profile Ref. No.		~

2. When a rule is applied, all document name upload to this folder will auto renamed according to the rule and sequence you have configured.

+ New \vee		Index \checkmark View \sim	Change Colum	nn View Recycle	Bin 🖾	G
		Î File Name	Staff No.	Employee Full Name	Position Title	Department
	☆ 💼	- EP-0002	HR240135	PETER CHAN	Project Manager	Information Technology
	☆ 📩	- EP-0003	HR240136	CARMEN WONG	Human Resources	Human Resources

3. For more information, please refer to section "Rules and Sequence" in "A624002 – Antelope 6 Workspace Administration Manual".

IV. Filter Owner

1. Every user account, user group and functional group is assigned with specific access permission on the folder.

New Folder		Upd	late	×
General	Advance			
Rule				
Filter Owner				`]

2. If your login account does not have "Manage" rights on this folder, you can only see the documents which are created by yourself, which means the owner of the document is you.

Permission Level								
۲			Company	Name	Read	Preview	Modify	Manage
	۲							
3	Û	¢	Company	Access Deny	•			
5	Û	¢	Company	Full Access	0	0	0	0
6	Û	Ø	Company	Modify	0	0	0	

Note: Permission Level can only be managed by your system administrator.

- 3. If your login account is assigned the "Manage" rights on this folder, you can see all documents even the owner is not you.
- 4. The following are some samples of different user accounts can see in a folder with "Filter Owner" turned on.

User Account	With "Manage" access permission	What user account see in the folder					
Antelope	Yes		File Name	Size	Version	Version Date	Version By
-		w .	EP-0042	13 KB	1.0	2024-09-01 14:51:24	Jennifer Tam
		w .	EP-0043	13 KB	1.0	2024-09-01 14:52:42	Antelope
		w -	EP-0044	13 KB	1.0	2024-09-01 14:52:56	User1
		w .	EP-0045	13 KB	1.0	2024-09-01 14:54:18	User2
Jennifer Tam	No		File Name	Size	Version	Version Date	Version By
		•	EP-0042	13 KB	1.0	2024-09-01 14:51:24	Jennifer Tam
User1	No		File Name	Size	Version	Version Date	Version By
		w 🗸	EP-0044	13 KE	3 1.0	2024-09-01 14:52:50	6 User1
User2	No		Î File Name	Size	Versio	n Version Date	Version By
		w -	EP-0045	13 K	3 1.	0 2024-09-01 14:54:1	8 User2

V. Major and Minor Version

1. When the folder is minor version enabled, all documents upload to this folder will start from version 0.1.



- 2. Whenever there are content changes in the document, the version will increase by 0.1, until the document is published to another major version.
- 3. If the folder minor version is disabled, all documents upload to this folder will start from version 1.0, 2.0, 3.0 and so on.
- 4. For more information, please refer to Section N (VII).

VI. Maximum Major Version / Maximum Minor Version

1. The maximum major or minor versions define the maximum number of version documents can store in the folder.

Max. Major Vers	ion	
3		
Max. Minor Vers	ion	
5		

2. If the maximum major version is set to 3, which means the system will store only the latest three versions. When the fourth one is updated, the first one will be removed automatically, which is in a model of First-In First-Out (FIFO).

on Hist	ory							E	×
					File Name	Version By	Version	Version Date	
	۲	,		w	Non-disclosure agreement.docx	Antelope	6.0	2024-09-01 15:10:15	
۲	쓚	Ъ	⑪	w	Non-disclosure agreement.docx	Antelope	5.6	2024-09-01 15:10:07	
۲	샹	Э	⑪	w	Non-disclosure agreement.docx	Antelope	5.5	2024-09-01 15:09:58	
۲	公	D	Û	w	Non-disclosure agreement.docx	Antelope	5.4	2024-09-01 15:09:55	
۲	公	Ð	⑪	w	Non-disclosure agreement.docx	Antelope	5.3	2024-09-01 15:09:50	
۲	盎	D	⑪	w	Non-disclosure agreement.docx	Antelope	5.2	2024-09-01 15:09:47	
۲	샹	D	۵	w	Non-disclosure agreement.docx	Antelope	5.0	2024-09-01 15:09:22	
۲	公	D	⑪	w	Non-disclosure agreement.docx	Antelope	4.0	2024-09-01 15:08:47	
	n Hist D D D D D D D D	n History ④ ④ ④ ④ ④ ④ ④ ④ ④ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤ ⑤	Implication Implication <t< th=""><th>Implicitation Implicitation Implicitation</th><th>Image: Amage: Amage:</th><th>File Name File Name Image: Select of the select</th><th>File Name Version By Image: Point Series Seri</th><th>NistoryFile NameVersion ByVersionImage: Select to the select</th><th>Itilistory Itilistory File Name Version By Version Version Date Image: Second Secon</th></t<>	Implicitation Implicitation	Image: Amage:	File Name File Name Image: Select of the select	File Name Version By Image: Point Series Seri	NistoryFile NameVersion ByVersionImage: Select to the select	Itilistory Itilistory File Name Version By Version Version Date Image: Second Secon

Note: In the above case, only the latest 3 major versions are retained (V 4,5,6), while the latest 5 minor versions are retained also (V 5.2, 5.3, 5.4, 5.5, 5.6)

VII. Copy Index

1. Folder supports profile indexing. To index a folder, select a folder from document list.

Edit	Update	×
General Advance		
Rule		
		~
Filter Owner		
OFF		
Minor Version		
3		
Max. Minor Version		
5		
Show Page Count		
Copy Index		

2. Select "Index" menu from the toolbar, then select "Edit" option.

Home > Sam	nples > /	Agree	ments					
+ New \vee	↑ Upl	oad	Index \checkmark	View $$	Change Column View	Recy	cle Bin	10
			Edit			Size	Version	Version Date
			Export					
\checkmark	☆	- 1	Import		ements			2024-09-01 15:18:03
	☆			ements				2024-09-01 15:18:24

3. Input meta-data for the folder.

					Î File Name	Size	Version	Version Date	Hash Tag	Subject Matter	Agreement Type
	1	A		•	Non-Disclosure Agreements			2024-09-01 15:21:34	#NDA		Non-Disclosure Agreement
\checkmark		8	10	*	Rental Agreements			2024-09-01 15:21:34	#Rental Agreement		Property and Rental
											Property and Rental Purchase Recruitment Agency Non-Disclosure Agreement

4. Click the blue save button from the toolbar.

5. If "Copy Index" is enabled, all new documents upload under this folder will inherit the folder index.

≡ (a)	Name V Keyword Search	× Q		☆ 3 ® •
Home > Samples > Agreements > Non-Disclosure Agree	ments			Ģ
+ New \checkmark \checkmark Upload Index \checkmark View \checkmark	Change Column View Recycle Bin 🔞		G	< 0 to 0 (Page 1) \sim >
🗌 👻 🚺 File Name	Size Version Version Date	Hash Tag	Subject Matter	Agreement Type

Upload new document to this folder...

≡ 🕄		Name	Keyword Searc	h		× Q		A 9 9-
Home > Sample	s > Agreeme	nts > Non-Disclosure Agreements						Ţ
+ New 🗸 🕋	Upload	Index View View Change Colu	umn View Recy	cle Bin	1		C	1 to 2 (Page 1) ~ >
		Î File Name	Size	Version	Version Date	Hash Tag	Subject Matter	Agreement Type
	<u>ن</u>	Non-disclosure agreement.docx	85 KB	0.1	2024-09-01 15:23:37			Non-Disclosure Agreement
	ሰ 💼 🔹	Non-disclosure agreement.pdf	76 KB	0.1	2024-09-01 15:23:37			Non-Disclosure Agreement

All documents index field values are inherited from their parent folder.

VIII. Quota Schema

- 1. Quota scheme is a control rule which limit the folder storage capacity or criteria with one of the following options:
 - a. What document types are allowed to upload
 - b. Maximum number of documents
 - c. Maximum storage of documents

5	
Show Page Count	
OFF	
c	
Quota Schema	

2. For more information, please refer to section "Quota Schema".

Quota S	chema							
×			Company	Name			Total Size Limit in KB	
	1	(1)	Company	Limit to 10	0Mb Fi	le Size	10000	
	۵	()	Company	Not allow	√ideo F	iles		
				Rules				×
						File Extension	Size Limit per File in KB	
					Û	.avi	0	
					Û	.mpg	0	
					Û	.mov	0	
				8	Û	.mp4	0	

3. Once the quota limit is set, there will be a control on the document to upload.

≡ 🕄	Name - Keyword Sear	rch
Home > Sample	es > Agreements > Non-Disclosure Agreements	
+ New ~ 7	$\overline{\mathbb{P}}$ Upload Index \checkmark View \checkmark Change Column View Rec	ycle Bin 🛛 🕄
	20220629, 123214000 iOS mpd, 4 0MB. The file size is exceed the	Version Version Date
	single file size limit	0.1 2024-09-01 15:23:37
		0.1 2024-09-01 15:23:37

IX. Edit Folder

1. Select the folder you want to edit profile. Right-click to bring up the context menu, then select "More > Edit".

Samples Samples Share to external test	Share To Update Thumbnail	+	
Test	More Cut	•	Delete Edit
Advanced Search	Сору		Follow
Workflow Applications			Temporary Permission
System			Permission

2. The "Edit" window will appear.

dit	Update	×
General Advance		
Document Profile		
General		~
Folder Name		
Samples		
Description		
Folder Type		
Normal		~
Default eForm		
		~
Sort Field		

3. Click "Update" button to commit changes.

X. Share Folder Link to Internal User

1. To share a folder as hyperlink to internal user, select the folder you want to share, rightclick to bring up the context menu, then select "Share To > Internal".

~				
> Samples	Share To	•	Internal	
> C share to external test			Internal	
share to external test	Update Thumbnail			
> T Test				
	More	•		
III Recycle Bin	Cut			
	Cut			
Advanced Search	Сору			

- The action preference can be configured by system administrator under "Setup > Setting > Preference > Send Document Link".

Preferences			Update	×
Document List	Folder Tree			
Number of documents	s display per pag	e		
100				~
Send document link				
✓ Popup email client				
Copy to clipboard				
Show Description			1.1.1.1.1.1.1.1	_
OFF				

XI. Update Folder Thumbnail

1. Select a folder you want to change thumbnail, right-click to bring up the context menu, select "Update Thumbnail".

+ New ∨	ΥU	pload		Index View View V	 Cha 	inge Column	View Recy	ycle Bin	10
- T				[†] File Name	Size	Version	Version Date		Version By
~	☆			Elephant			2024 00 01 1	-35:59	
	☆			Panda		Share To	•	36:21	
			•	Penguin		Update Thur	mbnail	36:15	
	☆			Zebra		More	,	36:27	

2. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click "Upload" button.

Update Thumbnail	Upload ×
Browse	20 MB JPEG File Only (500 x 500px)
File Name:	×

3. To view the folder thumbnail, from the document list toolbar, select View > Thumbnail.



XII. Delete Folder

1. Select a folder you want to change thumbnail, right-click to bring up the context menu, select More > Delete.

New V	ΤU	pioad		Index View V	Chan	ige Column	view Recj	ycle Bin	101	
] 🔻				File Name	Size	Version	Version Date		Version By	Hash Tag
	☆		•	Elephant			2024 00 01 1	5:35:59		
]			•	Panda	Sh	are To	▶ baail	5:36:21		
1			•	Penguin	M	ore	briali	:-26-1E		
]			-	Zebra	Cu	t	,	Dele	te	
					Co	ру		Follo	w porary Permission	
								Borra	aission	

2. A confirmation message will appear, click "Yes" button to confirm.

G. Follow

Follow is a feature which allows you to "monitor" a folder for new incoming documents and send alerts to users, trigger any workflows or AI Capture Service.

I. Create New Follow

 To create a new Follow, select a folder, right click to bring out the context menu. Select More > Follow.



2. The Follow window will appear. Click the "Add" icon.

Follow		
	Created Date	Туре
Ð		

3. Select the following options. This will send email to the document owner when a new document is added to the folder. Click "Update" button to save.

New	Update	×
This happen when		
a new document is added		~
right after		
when it just happen		~
Action		
Email Alert Owner		~

4. A new Follow rule is added.

Follow						. X
	Created Date	Туре	Advance Setting	Template	Members	
۲						
1	2024-08-27	a new document is added		Email Alert Owner	Antelope	

5. From now on, when you add a new document to the folder, the document owner will receive an email notification.



II. Follow Events

There are different events which can trigger a Follow action. The following table is a full description on what events you can configure for folder monitoring:

This Happens When	
Options	Description
A new document is added	When a new document is added to the folder.
A document is updated	When a document is updated with newer version, or the document index is updated.
A document is commented	When user comment on a document.
Advanced	Works with below option "some index field(s) values are matched" only.

Right After	
Options	Description
some index field(s) values are matched	Refer to Section IV.
When it just happens	Right after user complete the action, for examples, add document, update index, update version etc.
The document is modified for 3 years.	After the document is modified for three years (e.g. update index, update version)
The document is created for 5 years.	After the document is uploaded for 5 years.

Action	
Options	Description
Add to Group List	Add to "Notification" webpart. You are required to select which user group(s) to notify.
Add to My List	Add to "Notification" webpart.
Add to User List	Add to "Notification" webpart. You are required to select which user account(s) to notify.
Email Alert Group	Send email notification to recipient(s). You are required to select which user group(s) to notify.
Email Alert Owner	Send email notification to document owner.
Email Alert User	Send email notification to recipient(s). You are required to select which user account(s) to notify.
Start Workflow – Al Capture Service	Document uploaded to the folder will auto run AI Capture.
Start Workflow – Expenses Claim.rwt	Auto start the Expense Claim workflow when a new document is added to the folder. The document will become an attachment to the workflow.

III. Tigger by Index Field

- 1. This option is to trigger a Follow action when a document matches a certain criterion, for example, when the index field of a contract "Contract Expiry Date" reaches a certain date, or 30 days before the expiry date.
- 2. Select "Advance" and "some index field(s) values are matched".

New	Update	×
This happen when		
Advance		~
right after		
some index field(s) values are matched		~
Action		
Email Alert Owner		~

3. The index field(s) options will appear.

	Update	×
happen when		
dvance		~
it after		
ome index field(s) values are matched		~
on		
mail Alert Owner		~
l Template		
ubscriptionCommentEmail		~
ax Field ubject Matter		~
d Type		
lumeric		~
erator		
		~
ex value		

Here is an example, if you want the system to notify the document owner when the contract date reaches 30 days before "2025-10-15", then you should set the Index Value "Now() – 30D"

	> Agreements > Real Estate Pu	rchase Agreement.pdf			
다 Edit Relation	Share To Compare	Index Reminder Redaction AI Genie			
Index List		□ 📮 156% × ⊖ ⊕ 🖑 📫 Ver 1.0 / by Brandon	~ (2 🗇	愈
File Name	Real Estate Purchase Agreen				
Size	227 KB				
Version	1.0				
Version Date	2024-06-28 13:28:14	Real Estate Purchase Agreement for New York			
Hash Tag		THIS SALES ACREEMENT (the "Agreement") dated this 4th day of APPIL 2024 (the		
Subject Matter	Real Estate Purchase Agreem	"Execution Date")	the		
Agreement Type	Property and Rental	Execution Date y			
Date of Agreement	2024-04-04				
Contract Expiry Date	2025-10-15	BETWEEN :			
		Peter Chan			
		(the "Seller")			
		OF THE FIRST	PAR	Г	
		-AND-			
		Sonhia Chan			
		(the "Buyer")			
		OF THE SECONE	PAR	Г	
		BACKGROUND			
		The Seller wishes to sell a certain completed home and the Buyer wishes to purchase this compl	eted		
		home			

Index Field	
Contract Expiry Date	~
Field Type	
Datetime	~
Operator	
=	~
Index value	
Now() - 30D	

H. Permission

I. Assign Permission

1. To assign a permission, select the folder (or document), right click to bring up the context menu, select More > Permission.

Agreements Human Resources	Share To	×	
С п	More	•	Delete
Logistic	Cut		Edit
Management	Сору		Follow
Marketing			Temporary Permission
C Office Admin			Permission
ed Search		-	

2. The Permission window will appear.

Permission						8	×
			User or Group	Functional Name	Permission Level		
	۲						
	榕	22	Administration Group (\$Administrators)		Company\Full Access		
	容	22	System Service Group (\$System Services)		Company\Full Access		
	榕	22	Accounting Department (Accounting)		Company\Read Only		
	Agreement	s				teaste intrasit	
	Permission i	inherit fr	om parent folder			neak innent	

3. Click the first empty row position to bring up the "Select user or group" window.

Select user or group		×
Users ~	Name	
Antelope admin		Select
User1 user1		Select
User2 user2		Select
User3		Select

4. Select the user account to add, for example "User1".

Permission					×
		User or Group	Functional Name	Permission Level	
€		User1			
路	22	Administration Group (\$Administrators)		Company\Full Access	
器	22	System Service Group (\$System Services)		Company\Full Access	
路	22	Accounting Department (Accounting)		Company\Read Only	

5. Select the "Permission Level", for example "Modify".

Permission					8	×
		User or Group	Functional Name	Permission Level		
€		User1		Company\Modify		
磐	-	Administration Group (\$Administrators)		Company\Access Deny Company\Full Access		
窓	22	System Service Group (\$System Services)		Company\Modify		
榕	<u>88</u>	Accounting Department (Accounting)		Company\Share Company\Workflow Man	ager	

6. Click the blue add icon to commit changes.

				User or Group	Functional Name	Permission Level	
	\odot						
1	Û	绺	1	User1 (user1)		Company\Modify	
	绺		22	Administration Group (\$Administrators)		Company\Full Access	
	幋		22	System Service Group (\$System Services)		Company\Full Access	
	绺		22	Accounting Department (Accounting)		Company\Read Only	

7. Instead of user account, you can add User Group by selecting the User Group option.



II. Break Inherit

1. All folder permissions are inherited from its parent folder. If you want to break the inheritance, click the blue "Break Inherit" button at the bottom of the Permission window.



- 2. A confirmation message will appear, click Confirm button.
- 3. All permissions are now effective as standalone and will not inherit from its parent folder. You can remove any effective permission.

Permissio							×
				User or Group	Functional Name	Permission Level	
	۲						
1	Û	绺	22	Administration Group (\$Administrators)		Company\Full Access	
1	۵	绺	-	System Service Group (\$System Services)		Company\Full Access	
1	۵	绺	22	Accounting Department (Accounting)		Company\Read Only	
	Û	绺	1	User1 (user1)		Company\Modify	

III. Restore Inherit

1. To restore the folder to inherit from its parent folder, click the "Restore Inherit" button.



2. The folder will inherit its parent folder's original permission.

· · · · · · · · · · · · · · · · · · ·				•	×
······································	User or Group	Functional Name	Permission Level		
· · · · · · · · · · · · · · · · · · ·					
** 11 ** 11 ** 11 ** 11 ** 11 ** 11 ** 11 ** 11	Administration Group (\$Administrators)		Company\Full Access		
※ 並 10 学 並 10 学 並	System Service Group (\$System Services)		Company\Full Access		
副 副 部 註 国 日 容 註	Accounting Department (Accounting)		Company\Read Only		
8 🗊 🕸 <u>11</u>	Administration Group (\$Administrators)		Company\Full Access		
	System Service Group (\$System Services)		Company\Full Access		
前 幣 <u>11</u>	Accounting Department (Accounting)		Company\Read Only		
🗈 🗇 😤 💄	User1 (user1)		Company\Modify		

3. You should remove those existing permission which contradict or duplicate with the original one.

missio	m						E	×
				User or Group	Functional Name	Permission Level		
	\oplus							
	쐄		22	Administration Group (\$Administrators)		Company\Full Access		
	榕		22	System Service Group (\$System Services)		Company\Full Access		
	绺		22	Accounting Department (Accounting)		Company\Read Only		
	Û	熠	22.	Administration Group (\$Administrators)		Company\Full Access		
	۵	쐉	22	System Service Group (\$System Services)		Company\Full Access		
(1)		绺	22	Accounting Department (Accounting)		Company\Read Only		
(3)	Û	:8:	1	User1 (user1)		Company\Modify		

I. Temporary Permission

I. Assign Temporary Permission

1. You can assign a temporary permission for any user account to access the current folder.



2. Select the user account, date range and permission level.

Tempo	rary Permission					×
	Grant To	Div./Dept.	From Date	To Date	Permission Level	
€	User1		2024-08-28	2024-08-30	Company\Read Only	

3. Click the blue add icon to commit changes.

Tempora	ry Permission					*	×
	Grant To	Div./Dept.	From Date	To Date	Permission Level		
÷							
۵	User1		2024-08-28	2024-08-30	Company\Read Only		

J. Recycle Bin

I. Recycle Bin View

1. The view the recycle bin, click the "Recycle Bin" icon from the folder tree.

≡ ⓐ	Name V Keyword Se	arch	×Q		*	?
Recycle Bin						Ŷ
Folders	10 III			G	< 1 to 7 (Pag	te 1)
V P Quick Access	Name	Size Version	Owner / Display Name	Delete By	Modified Date	Folder Path
My Check Out	Bill of Lading		1.0 Antelope	Antelope	2024-08-28 09:22:25	Home\Sample:
My Favorites	inv24003.pdf	140 KB	1.0 Antelope	Antelope	2024-08-28 09:22:25	Home\Sample:
My Clipboard	PB268491.pdf	65 KB	1.0 Antelope	Antelope	2024-08-28 09:22:25	Home\Sample:
② Recent Open Documents	PB268492.pdf	503 KB	2.0 Antelope	Antelope	2024-08-28 09:22:25	Home\Sample
Personal Folder	DC00000004.txt	0 KB	1.0 User2	Antelope	2024-08-28 09:22:25	Home\Sample
✓	PB268493.pdf	65 KB	1.0 User2	Antelope	2024-08-28 09:22:25	Home\Sample
> D Personal Folders	This is a Test.docx	13 KB	1.0 Antelope	Antelope	2024-08-27 17:37:21	Home\Sample
> Projects						
> 🗀 Samples						
Recycle Bin						

2. To purge all documents, click the recycle bin icon from the top of the list.

Û	8		
	Name	Size	Version
C] Bill of Lading		
P	JNV24003.pdf	140 KB	
P	PB268491.pdf	65 KB	
P	PB268492.pdf	503 KB	

3. To purge selected document, select those documents and click "Purge Document" from the context menu.

Name		Size	Version
Bill of Lading			
INV24003.pdf		140 KB	
PB268491.pdf		65 KB	
PB268492.pdf		503 KB	
DC0000004.txt	Bestern	0 КВ	
PB268493.pdf	Restore	55 KB	
This is a Test.docx	Purge Docum	L3 KB	

4. To restore the deleted documents, click "Restore" from the context menu. However, if the documents' parent folder is already removed, you cannot restore any content.

Nam	e		Size	Versi	on
🗀 Bill of	f Lading				
INV2	4003.pdf		140 KB		
PB26	8491.pdf	Re	estore		
PB26	8492.pdf	Pu	irge Document		
📑 DC00	000004.txt		0 KB		
PB26	8493.pdf		65 KB		
🔽 This i	s a Test.docx		13 KB		

II. Folder Recycle Bin

1. To view what document(s) are deleted in a specific folder, click "Recycle Bin" button from the document list.

≡ (8)		Name 💙	Keyword Search		× ۵			≈ 0 ⊗ ,
Home > Samples > Accounting > Invoice:	s							Ţ
Folders	+ New \checkmark	T Upload	Index \checkmark View \vee	Change Column	View Recycle Bin		G <	1 to 3 (Page 1) ~ >
✓ ♥ Quick Access			File Name	Size Version	Version Date	Version By	Hash Tag	Invoice No.
My Check Out		☆ 📩 🗸	INV24001.pdf	139 KB 1.0	2024-06-28 12:51:07	Antelope	#123	
🔄 My Favorites		12 📩 🔹	INV24002.pdf	140 KB 1.0	2024-06-28 12:51:08	Antelope		
My Clipboard		습 📩 -	INV24003.pdf	140 KB 1.0	2024-08-20 11:54:16	Antelope		
② Recent Open Documents								
Personal Folder								
∽ 🕞 Home								
> D Personal Folders								
~ 🗀 Projects								
> 🕎 Project Alpha								
✓ □ Samples								
~ 🗋 Accounting								
> 🗋 Invoices								
> D Purchase Orders								
> C Agreements								

2. This will show all document(s) which are deleted within the selected folder.

≡ ⓐ		Name	~	Keyword Search					×Q			â	8	@ -
Home > Samples > Accounting > Invoices														Ģ
Folders	Ö									C	<	1 to 1 (Pa	ige 1)	~ >
Personal Folder	Name				Size		Version		Owner / Display Name	Delete By	Modified	Date	Fol	der Path
> D Personal Folders	w This is a	lest.docx				13 KB		1.0	Antelope	Antelope	2024-08-2	7 17:37:21	Hor	ne\Samples
Projects Project Alpha														
∽ 🗋 Samples														
~ 🗋 Accounting														
> 🗋 Invoices														
> D Purchase Orders														
> C Agreements														

K. Hyperlink

I. Create New Hyperlink

- 1. To create a new link, select a folder.
- 2. Select "New" context menu, then "New Hyperlink".



3. The New Hyperlink window will appear. Input the "Name" and "URL Address".

New Hyperlink	Create	×
URL Name		
Google		
URL Address		
https://www.google.com		

4. Click "Create" button to save.



II. Edit Hyperlink

1. To edit a hyperlink, select "Edit" from the context menu.

	File Name		Size	Version	Version Date
☆ 🌖 🗸	Google			1.0	2024-08-28 21:58:22
		More	,	Edit	
				Delete	

2. Edit either the "Name" or "URL Address", then click "Update" button to commit changes.

III. Delete Hyperlink

1. To delete a hyperlink, select "Delete" from the context menu.

	Î File Name					Version Date
☆ 🌖	•	Google	More	•	Edit Delete	2004-08-28 21:58:22

2. A pop-up message will ask for confirmation. Click "OK" to commit.

L. Calendar

I. Create New Calendar

- 1. To create a new calendar, select a folder.
- 2. Select "New" context menu, then "New Calendar".



3. The New Calendar window will appear. Input the "Name".

New Calendar	Create	×
Calendar Name		
Sample		

4. Click "Create" button to save.

+ New \sim	↑ Upload	Index \checkmark View \checkmark	Change Column View Recycle Bin
		Î File Name	Size Version Version Date
	☆ 📃 ,	Sample	1.0 2024-08-28 22:28:26

II. Create Activity

 Click the calendar record to open the calend 	dar view.
--	-----------

DAY W	EEK MONTH		August 2024		<	TODAY >
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	.30	31	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17

2. Double click one of the dates, the New Event window will appear. Fill-in the description and location, select the participants and date of the activity.

00:00 - 00:00	NEW EVENT			
Туре	Task			•
Description	New event			
Assign To	admin			
Status	Active 🔻			
Work				
Complete Ratio				
🗹 Full day	(€) 00:00 ▼	30 🕶	July 🗸	2024 -
	(00:00 ▼	31 🕶	July 🗸	2024 -
			CANCEL	SAVE

3. Click "Save" button to commit changes.

DAY	W	EEK	MONTH		<	TODAY >		
Sunday			Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	28		29	30 • 12:00 Project Mee	31	01	02	03
	04		05	06	07	08	09	10

III. Edit Activity

- 1. To edit an existing activity, double click the activity record.
- 2. Modify the activity and click "Save" button to commit changes.

12:00 - 13:00 F	ROJECT MEETING
Туре	Activity
Description	Project Meeting
Participants	admin 🤣
Location	Boardroom A
🗌 Full day	③ 12:00 ▼ 30 ▼ July ▼ 2024 ▼
	③ 13:00 ▼ 30 ▼ July ▼ 2024 ▼
DELETE	CANCEL SAVE

M. Document List

I. Document List and Thumbnail View

- 1. The document list shows the name, properties and index fields.
- 2. To change into thumbnail view, from the document list toolbar, click View > Thumbnail.

+ New \vee	T Upload	Index \checkmark	View \checkmark	Change	Column	View Recycle Bin	D
□ 〒		i File Nar	List view		rsion	Version Date	Version By
			Thumbnail				
	습 💏	INV24004.	pdf	139 KB	1.0	2024-08-31 12:10:28	Antelope
	☆ 📩 .	INV24005.	pdf	139 KB	1.0	2024-08-31 12:10:53	Antelope

- 3. The documents are shown in thumbnail.
- 4. To change back to document list view, from the document list toolbar, click View > List View.

+ New \checkmark	↑ Upload	Index \checkmark	View \checkmark	Change	Column	View Recycle Bin	B
□ ₹		† File Nar	List view		rsion	Version Date	Version By
			Thumbnail				
	습 👝 🔹	INV24004	.pdt	139 KB	1.0	2024-08-31 12:10:28	Antelope
	☆ 📩 🔹	INV24005	.pdf	139 KB	1.0	2024-08-31 12:10:53	Antelope

II. Column Filter

- 1. Apart from document full-text search and advanced search, you can also perform a quick searching using column filter.
- 2. From the document list, click the $\overline{}$ icon.



3. The column filter will appear.

+ New \sim	T Upload		Index 🗸 View 🖄	 Chang 	ge Columr	View Recycle Bin	B	
T			Î File Name	Size	Version	Version Date	Version By	Hash Tag
	습 💼	•	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	
	☆ 📩	•	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	
	☆ 💼		INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	

4. Input the text which appears in the below document grid which you want to filter out.

+ New \vee	T Upload	Index 🗸 View 🕅	 Change 	e Column	Do	
T		File Name	Size	Version	Version Date	Version By
					32:14	
	☆ 📩	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope
	습 📩	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope
	☆ 📩	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope

5. The following data type cannot be searched by column filter: Hashtag, Details Line Items, Date Range (e.g. 2024-08-12 to 2024-08-30).

III. Export List

- 1. You can export the document list into .xlsx format.
- 2. From the document list toolbar, click Index > Export.

+ New \checkmark	→ Upload	Index \checkmark View \checkmark	Change Column View Recycle Bin 🔞					
— —		Export	Size	Version	Version Date	Version By		
	☆ 📩	Import	156 KB	1.0	2024-08-31 12:32:14	Antelope		
	☆ *	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope		
	☆ 📩	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope		

3. The document list is exported as "export.xlsx"

В									к		м	N	
File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items	Ĩ
INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details	
INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details	1
INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details	1
INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details	1
INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details	1
INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details	1
INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0 .0000	Details	ļ
INV24008.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							5 .0000	Details	Ì
INV24009.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details	T
INV24010.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details	ļ
INV24011.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details	Ţ
	B File Name INV24001.pdf INV24002.pdf INV24003.pdf INV24005.pdf INV24005.pdf INV24006.pdf INV24009.pdf INV24009.pdf INV24009.pdf INV24009.pdf INV2400.pdf INV2400.pdf INV2400.pdf INV2401.pdf	B C File Name Size INV24001.pdf Size INV24002.pdf 140 KB INV24003.pdf 140 KB INV24005.pdf 139 KB INV24005.pdf 139 KB INV24005.pdf 139 KB INV24005.pdf 139 KB INV24006.pdf 139 KB INV24008.pdf 139 KB INV24009.pdf 139 KB INV24010.pdf 138 KB INV24011.pdf 138 KB	B C D File Name Size Version INV24001.pdf 156 KB To INV24003.pdf 140 KB To INV24003.pdf 140 KB To INV24005.pdf 139 KB To INV24009.pdf 139 KB To INV24009.pdf 139 KB To INV24009.pdf 139 KB To INV24009.pdf 138 KB To INV24009.pdf 138 KB To INV24010.pdf 138 KB To	B C D E File Name Size Version Version Date INV24001.pdf 56 KB 1.0 2024-06-31 12:32:14 INV24001.pdf 140 KB 1.0 2024-06-31 12:32:14 INV24002.pdf 140 KB 1.0 2024-06-31 12:32:15 INV24003.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24005.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24005.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24007.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24009.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24009.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24009.pdf 139 KB 1.0 2024-06-31 12:32:15 INV24010.pdf 138 KB 1.0 2024-06-31 12:32:15 INV24010.pdf 138 KB 1.0 2024-06-31 12:32:16	B C D E F File Name Size Version Date Version Byt INV24001.pdf 156 KB 1.0 2024-08-31 12:32:14 Antelope INV24002.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope INV24003.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope INV24004.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24005.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24008.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24008.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24009.pdf 139 KB 1.0 2024-08-31 12:32:16 Antelope INV24010.pdf 138 KB 1	B C D E F G File Name Size Version Version Date Version By Hash Tag INV24001.pdf Size Version Date Version By Hash Tag INV24002.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope INV24003.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope INV24004.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24005.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24008.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24009.pdf 139 KB 1.0 2024-08-31 12:32:15 Antelope INV24009.pdf 138 KB 1.0 2024-08-31 12:32:16 Antelope INV24	B C D E F G H File Name Size Version Date Version By Hash Tag Invoice No. INV24001.pdf 166 KB 1.0 2024-08-31 12:32:14 Antelope Invoice No. INV24002.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope Invoice No. INV24003.pdf 140 KB 1.0 2024-08-31 12:32:14 Antelope Inv24004.pdf INV24003.pdf 140 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24008.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:15 Antelope Inv24004.pdf I39 KB 1.0 2024-08-31 12:32:16 Antelope Inv24004.pdf <	B C D E F G H I File Name Size Version Date Version Date Version By Hash Tag Invoice No. Invoice Date INV24001.pdf 156 KB To. 2024-08-31 12:32:14 Antelope Invoice No. Invoice Date INV24003.pdf 140 KB To. 2024-08-31 12:32:14 Antelope Inv24003.pdf 190 KB To. 2024-08-31 12:32:14 Antelope Inv24004.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Inv24003.pdf Inv3 KB To. 2024-08-31 12:32:15 Antelope Inv24004.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Inv24004.pdf Inv3 KB To. 2024-08-31 12:32:15 Antelope Inv24004.pdf Inv24016.pdf Inv24016.pdf	B C D E F G H I J File Name Size Version Date Version Date Version By Hash Tag Invoice No. Invoice Date PO No. INV24001.pdf 156 KB To. 2024-08-31 12:32:14 Antelope Invoice No. Invoice Date PO No. INV24002.pdf 140 KB To. 2024-08-31 12:32:14 Antelope Invoice Date PO No. INV24003.pdf 140 KB To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. INV24003.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. INV24005.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. INV24005.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. INV24006.pdf 139 KB To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. INV24000.pdf 139 KB To.	B C D E F G H I J K File Name Size Version Date Version By Hash Tag Invoice No. Invoice Date PO No. Due Date INV24001.pdf 156 K8 To. 2024-08-31 12:32:14 Antelope Invoice No. Invoice Date PO No. Due Date INV24001.pdf 140 K8 To. 2024-08-31 12:32:14 Antelope Invoice Date PO No. Due Date INV24003.pdf 140 K8 To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. Due Date INV24004.pdf 139 K8 To. 2024-08-31 12:32:15 Antelope Invoice Date PO No. Due Date INV24005.pdf 139 K8 To. 2024-08-31 12:32:15 Antelope Invoice Date Invoice Date	B C D E F G H I J K L File Name Size Version Date Number Date Due Date Supplier Name INV24002.pdf 156 K8 Ti.0 2024-08-31 12:32:14 Antelope	B C D E F G H I J K L M File Name Size Version Date No Due Date Supplier Name Total Amount INV24001.pdf 156 K8 7.0 2024-08-31 12:32:14 Antelope 0.0000	B C D E F G H I J K L M N File Name Size Version Version Date No Due Date Suppler Name Total Amount Line Items INV24001.pdf 136 K8 1.0 2024/08-31 12:32:14 Antelope Invoice No. Invoice Date PO No. Due Date Suppler Name Total Amount Line Items INV24001.pdf 140 K8 1.0 2024/08-31 12:32:15 Antelope Invoice No. Invoice Date PO No. Due Date Suppler Name Total Amount Line Items INV24001.pdf 139 K8 1.0 2024/08-31 12:32:15 Antelope Invoice No. Invoice Date PO No. Due Date Suppler Name Total Amount Line Items INV24005.pdf 139 K8 1.0 2024/08-31 12:32:15 Antelope Invoice Date Invoice Date Invoice Date Suppler Namount Total Amount </td

IV. Import List

- 1. You can modify the "export.xlsx" and import to the document list for purpose of batch indexing.
- 2. Modify the data you wish to import, remember when you modify the cell value, you must follow the data type. For example, you cannot input numeric value in "Date" type, or input a date in "Numeric" type.

	А	В	с	D	E	F	G	н			к		м	N
1 ID		File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2 2737	7	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	#ABC	INV24001	12/8/2024	PO12345	11/9/2024	ABC Company	13560	Details
3 2735	5	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	#DEF	INV24002	13/8/2024	PO12346	12/9/2024	DEF Company	12304	Details
4 2736	5	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
5 2739	9	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2738	8	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
7 2740	0	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
8 2743	3	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							5 .0000	Details

3. From the document list toolbar, select Index > Import.

+ New \vee	↑ Upload	Index \checkmark View \checkmark	Change Colum	n View Recycle Bin	5
-		Export	Size Version	Version Date	Version By
	값 📩	Import	156 KB 1.0	2024-08-31 12:32:14	Antelope
	☆ 📩	 INV24002.pdf 	140 KB 1.0	2024-08-31 12:32:14	Antelope

4. The document list is indexed automatically.

+ New \sim	T Uploa	ad	Index \checkmark View \sim	Change	e Column View Recycle Bir	8				
-			File Name	Size	Version Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.
	☆ 💼	-	INV24001.pdf	156 KB	1.0 2024-08-31 12:32:14	Antelope	#ABC	INV24001	2024-08-12	PO12345
	☆ 💼	. -	INV24002.pdf	140 KB	1.0 2024-08-31 12:32:14	Antelope	#DEF	INV24002	2024-08-13	PO12346
	습 💼	-	INV24003.pdf	140 KB	1.0 2024-08-31 12:32:14	Antelope				
	☆ 💼	-	INV24004.pdf	139 KB	1.0 2024-08-31 12:32:15	Antelope				

V. Change Column View

 You can change the sequence of column or hide any column of the specific folder by "Change Column View". From the document list toolbar, click the "Change Column View" button.

+ New \vee	$\overline{\uparrow}$ Upload Index \lor View \lor	Change Column View Recycle Bin	6
-	[†] File Name	Size Version Version Date	Version By Hash Tag Invoice No.
	合 📄 🚽 INV24001.pdf	156 KB 1.0 2024-08-31 12:32:14	Antelope #ABC INV24001
	☆ 💼 🚽 INV24002.pdf	140 KB 1.0 2024-08-31 12:32:14	Antelope #DEF INV24002
	☆ 📄 🚽 INV24003.pdf	140 KB 1.0 2024-08-31 12:32:14	Antelope

2. Select those columns on the right-hand side that you don't want to display in document list, and click the < icon.

Reset	Save	*
		~
Selected Columns:		
Column Name		
File Name		
= Size		
= Version		
Version Date		
= Version By		
= Invoice No.		
= Invoice Date		
PO No.		
Supplier Name		
< Due Date		
= Total Amount		
	Columns: Column Name File Name Size Version Version By Invoice No. Invoice Date PO No. Supplier Name Que Date Total Amount	Reset Save Selected Columns: Column Name File Name File Name Size Version Version Date Version By Invoice No. Invoice No. Invoice Date PO No. Supplier Name Due Date Due Date Total Amount.

3. Drag and drop the column up and down to re-order their position.

= Invoice No.	
= Invoice Date	
= Supplier Name	
= PO No.	
= Due Date	
= Total Amount	

- 4. Click the blue "Save" button to commit changes.
- 5. The document list columns will re-order for the selected folder of your own user account according to your setting.

+ New \vee		Index \checkmark View \checkmark	Change Column	View Recycle Bin	6				
— —		File Name	Size Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name	PO No.
	☆ 📩	INV24001.pdf	156 KB 1	.0 2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company	PO12345
	습 💼	INV24002.pdf	140 KB 1	.0 2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company	PO12346
	12 m	INV24003.pdf	140 KB 1	.0 2024-08-31 12:32:14	Antelope				
	☆ 📩	INV24004.pdf	139 KB 1	.0 2024-08-31 12:32:15	Antelope				
	☆ 💼	INV24005.pdf	139 KB 1	.0 2024-08-31 12:32:15	Antelope				

6. If you want to reset your adjustment to factory setting, click the blue "Reset" button.



7. Pay attention that since you have customized the folder display setting, in case your system administrator has added a new index field, your folder document list will not reflect this new setting until you make another "Reset" or "Configuration" of your column view.

ange Column View		Reset	*
elect a Document Profile or Webpart:			
Document Profile List View - Invoices			~
vailable Columns:	Selected Columns:		
Column Name	Column Name		
— Hash Tag	File Name		
= Line Items	= Size		
New Field	= Version		
	= Version Date		
	= Version By		
	= Invoice No.		
	= Invoice Date		
	= Supplier Name		
	> = PO No.		
	Solution Due Date		
	= Total Amount		

N. Document

I. Upload Document

1. To upload a document, drag and drop the file(s) from your desktop to the document list.

T		te	Version By	Invoice N
© 329513.pdf 100% of 0.1MB <u>Cancel</u>		13:04:36	Antelope	
-		13:04:36	Antelope	
© 329514.pdf 100% of 0.1MB <u>Cancel</u>		12:32:14	Antelope	INV24001
Ø 329515.pdf <u>Cancel</u>		12:32:14	Antelope	INV24002
Ø 329516.pdf Cancel		12:32:14	Antelope	
Ø 329517.pdf <u>Cancel</u>		12:32:15	Antelope	
Ø 329518.pdf Cancel		12:32:15	Antelope	
Ø 329519.pdf <u>Cancel</u>		12:32:15	Antelope	
Ø 329520.pdf Cancel		12:32:15	Antelope	
		12:32:15	Antelope	
Upload Completed: 4 of 12 Files	Cancel Al	12:32:15	Antelope	
→ _ INV24010.pdf 138 KB	1.0 2024-08-3	31 12:32:16	Antelope	

- 2. The upper limit of upload size per document is 2.0GB.
- 3. In case something wrong during the upload process, please make sure your source documents are not being locked by other applications. If the situation keeps existing,

+ New \vee	T Upload	Index \checkmark View \sim	 Change Column View 	Recycle Bin	0
□ ₹	329510.pdf 329511.pdf 329512.pdf 329513.pdf 329514.pdf 329515.pdf	0.1MB No access for 0.1MB No access for	the object the object the object the object the object the object	ie ie	Version By
	Upload Com	pleted: 0 of 7 Files	Close		

please contact your system administrator or service provider.

II. Preview Document

1. To preview a document, click the document name.

+ New \vee	T Uplo	bad	Index \checkmark View \checkmark	Chang	je Column Vie	ew Recycle Bin	D	
— —			File Name	Size	Version	Version Date	Version By	Invoice No.
		POF -	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001
		er -	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002
		POF V	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	
		Por 🗸	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope	
		POF	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope	

2. Click Preview button.

INV24001.pdf			×
Preview	Check Out & Download	Download	

3. The document viewer will pop-up for previewing.

	Home > Samp	ples > Ac	counting > In	voices > INV	24001.pdf																×
	Edit Rela	ation	Share To	Compare	Index	Reminder	Redaction	AI Genie													
	2	34% ~	$\Theta \oplus$	Ð	7									1	/er 1.0 / by A	Intelope		C	λ¢	r q	3
BILL TO ABC COMPANY LIMITED Flat A, 10/F, SampleCorp Innovation Tower, Causeway Bay, Hong Kong									Invoice Invoice PO No. Due Dat	No. Date te:		INV24 10 th Ju PO123 10 th Ju	001 ne 2024 016 ly 2024	010	Œ	_					
	N	NO.		PART	ICULA	RS	Q	TY (PCS)	UNIT P	RICE	DIS	COUN	NT %	A	MOUN	Т				
		1	Product	Item A				2			100.00			0.00		2	00.00				
		2	Product	Item B				1			100.00			0.00		1	00.00				

4. To show the index field column, click the hamburger icon \equiv from the top left-hand side.

Home > Samples > Accounting > Invoices >	Home > Samples > Accounting > Invoices > INV24001.pdf											
🗘 Edit Relation Share To Compa	e Index Reminder	Redaction AI Genie										
Index List		176% - ⊖ ⊕ 🛛 🖑 🖽			Ver 1.0 / by Ant	telope ~	Q	Ø	1			
File Name INV24001.pdf												
Size 156 KB												
Version 1.0	A											
Version Date 2024-08-31 12:32:14	8085	SampleCorp						101/01/05				
Version By Antelope						INVOICE	8					
Invoice No. INV24001												
Invoice Date 2024-08-12	ABC	COMPANY LIMITED	Invoice No. : INV24001									
Supplier Name ABC Company	Flat A	, 10/F, SampleCorp Innovation Tower,		Invoice	Date : 10 th Jur	ne 2024						
PO No. PO12345	Cause	: PO123	: PO123016									
Due Date 2024-09-11	Hong Kong Due Date: : 10th July 2024											
Total Amount 13560.0000												
Line Items Details							_					
	NO.	PARTICULARS	QTY (PCS)	UNIT PRICE	DISCOUNT %	AMOUNT						
	1	Product Item A	2	100.00	0.00	200	00					
	2	Product Item B	1	100.00	0.00	100	00					

5. The following document type can be previewed on screen by default:

Document Type	Document Extension				
Word Processing	DOC, DOCX, RTF, TXT				
PowerPoint	РРТ, РРТХ				
Excel	XLS, XLSX				
Image	BMP, GIF, JPG, PNG, TIF, TIFF, PSD				
Video	MP4				

6. Note: The maximum size for document preview is 20 Mb.

III. Index Field

1. To index a document, from the document viewer toolbar, select Index > Edit.

Ξ	Home > Samples > Accounting > Invoices > INV24001.pdf												
☆	Edit	Relation	Share To	Compare	Index	Reminder	Red	action		AI Ger	nie		
Index	Index List			Edit		% ~	Θ	\oplus		Ð	C1		
File Name INV24001.pdf													
Size			156 KB										
Version 1.0			1.0			A							
Version Date 20			2024-08-31 12	2:32:14	SampleCorp								
Version By			Antelope					- 10	mova	mon-			

2. Edit the document index.

Index List		6	×				
File Name	INV24001.pdf						
Size	156 KB						
Version	1.0						
Version Date	2024-08-31 12	:32:14					
Version By	Antelope						
Invoice No.	INV24001						
Invoice Date	2024-08-12						
Supplier Name	ABC Company						
PO No.	PO12345						
Due Date	2024-09-11						
Total Amount	13560.0000						
Line Items	Details						

3. For line item, click the "Details" hyperlink to pop-up the line-item window.

Value De	tail						× 😰
		Item No.	Item Description	Qty	Unit Price	IGST	Total Amount
\oplus							
6	Ŵ	2	Product Item B	1	100	0	100
6	Û	1	Product Item A	2	100	0	200

- 4. Click the blue save button to commit changes.
- 5. You can also index a batch of documents by selecting Index > Edit from the document list toolbar.
| + New ~ | 🗸 🕂 Upload | Index \checkmark View \checkmark | Chang | ge Columr | View Recycle Bin | 8 | c | , < 1 to 11 | 1 (Page 1) 🗸 > |
|--------------|---------------|--------------------------------------|--------|-----------|---------------------|------------|-------------|--------------|----------------|
| - | | Edit | Size | Version | Version Date | Version By | Invoice No. | Invoice Date | Supplier Name |
| | ☆ 📩 | Export | 156 KB | 1.0 | 2024-08-31 12:32:14 | Antelope | INV24001 | 2024-08-12 | ABC Company |
| \checkmark | ☆ 📩 | . Import | 140 KB | 1.0 | 2024-08-31 12:32:14 | Antelope | INV24002 | 2024-08-13 | DEF Company |
| \checkmark | ☆ 📩 | INV24003.pdf | 140 KB | 1.0 | 2024-08-31 12:32:14 | Antelope | | | |
| \checkmark | ☆ 📩 | - INV24004.pdf | 139 KB | 1.0 | 2024-08-31 12:32:15 | Antelope | | | |
| \checkmark | ☆ 💼 | - INV24005.pdf | 139 KB | 1.0 | 2024-08-31 12:32:15 | Antelope | | | |
| | | INV24006.pdf | 139 KB | 1.0 | 2024-08-31 12:32:15 | Antelope | | | |
| | ☆ • •• | INV24007.pdf | 140 KB | 1.0 | 2024-08-31 12:32:15 | Antelope | | | |
| | ☆ 📩 | INV24008.pdf | 139 KB | 1.0 | 2024-08-31 12:32:15 | Antelope | | | |

6. Edit the index and click the blue save button to commit changes.

+ New \sim	T Upload	Index \checkmark View \checkmark	Chang	je Columr	View Recycle Bin	8	G	< 1 to 11	(Page 1)
		File Name	Size	Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name
	☆ 📩	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company
	습 📩	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company
	☆ 📩	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24003]	
	습 📩	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
	습 📩	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
	☆ 📩	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
	☆ 📩	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope			

IV. Check-Out and Edit

 To check-out a document for annotation, from the document viewer toolbar, select Edit > Check Out & Edit.

=	Home > Samples > Accounting > Invoices > INV240					24001.pdf					
☆	Edit	Relation	Sha	re To	Compare	Index	Reminder	Redaction	AI Genie		
Index	Check	Out & Edit					176	%~ ⊝ ⊕		t	
File Na	File Na Check Out & Download 01.pdf										
Size	Down	oad									
Versio	Mark Final Version Add to My Clipboard			A							
Versio				8-31 12	2:32:14	SampleCorp					
Versio											
Invoice	No.		INV24	001							
Invoice	Date		2024-0	08-12		BILL TO					
Supplie	Supplier Name ABC Co		ompany		Flat A. 10/F. SampleCorp Innovation Tower.				n Tower,		
PO No.	O No. PO12345		845			Causewa	iy Bay,	1	,		
Due Da	ate		2024-0	09-11			Hong Kong				
Total A	mount		13560	.0000							

2. The document is checked out and prevent other users from editing. A lock icon will appear beside the document and will show who has checked out the document.

+ New \vee	T Upload	Index \checkmark View \checkmark	Chang	je Column	View Recycle Bin	D
		File Name	Size	Version	Version Date	Version By
	☆ P ar	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope
check	out by Antelope	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope
		INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope

3. Upon check out, the annotation toolbar will be enabled.

Home > Samples > Accounting > Invoices > INV24001.pdf				
Edit Relation Share To Compare Index Reminder Redaction Al Genie				
📄 🔁 234% 🗸 💬 🕀 🚯 🛄 View Annotate Shapes Redact Insert Edit Fill and Sign Append File 🍏	C	Q	þ	ø
BILL TO ABC COMPANY LIMITED Flat A, 10/F, SampleCorp Innovation Tower, Invoice Date Causeway Bay, Hong Kong	E			

V. Document Viewer Annotation

1. All electronic documents upload to Antelope 6 will have a PDF file rendered for online preview and annotation purpose. The annotation tool contains the following features that you can perform on the document preview version.

lcon	Feature	Description / Sample
	Highlight	BILL TO ABC COMPANY LIMITED
<u>A</u>	Underline	BILL TO ABC COMPANY LIMITED
<u>^</u>	Strike Out	BILL TO ABC COMPANY LIMITED
A	Squiggly	BILL TO ABC COMPANY LIMITED
Ę	Note	Samplecorp Search comments BILL TO Page 1 ABC COMPANY LIMITED Flat A, 10/F, SampleCorp Innovation Tower, Causeway Bay, Hong Kong

Τ	Free Text	BILL TO ABC COMPANY LIMITED
	Rectangle	BILL TO ABC COMPANY LIMITED
Q	Free Hand	BILL TO ABC COMPANY LIMITED
R	Free Hand Highlight	BILL TO ABC COMPANY LIMITED
⊂	Redo / Undo	
	Eraser	Erase the annotation objects

b. Shapes

lcon	Feature	Description / Sample
Z	Free Hand	BILL TO ABC COMPANY LIMITED
R	Free Hand Highlight	BILL TO ABC COMPANY LIMITED
	Rectangle	BILL TO ABC COMPANY LIMITED
0	Ellipse	BILL TO ABC COMPANY LIMITED
۵	Polygon	BILL TO ABC COMPANY LIMITED
	Cloud	BILL TO ABC COMPANY LIMITED Flat A, 10/F, SampleCorp Innovation Tower,
/	Line	BILL TO ABC COMPANY LIMITED
~	Polyline	BILL TO ABC COMPANY LIMITED
>	Arrow	BILL TO ABC COMPANY LIMITED

c. Redact

lcon	Feature	Description / Sample
	Mark for Redaction	BILL TO Marked as Hidden
×	Redact entire page	All redaction will be marked permenant and saved as another version.
IIX	Redaction Panel	

d. Insert

lcon	Feature	Description / Sample
<u>Lri</u>	Signature by Drawing	Create New Signature X Draw Type Upload Sign here Clear
<u>Lri</u>	Signature by Type	Create New Signature X Draw Type Upload Jennifer Tam © • • Clear
<u>Lri</u>	Signature by Upload image	Create New Signature X Draw Type Upload Drag & Drop your image here Or Or Choose a signature
	Stamp (Standard)	APPROVED AS IS COMPLETED CONFIDENTIAL DEPARTMENTAL DRAFT EXPERIMENTAL EXPIRED FINAL FOR COMMENT FOR PUBLIC RELEASE INFORMATION ONLY NOT APPROVED NOT FOR PUBLIC RELEASE PRELIMINARY RESULTS SOLD

	Stamp (Custom)	Create New Stamp X
		Draft Antelope:1 31/08/2024 2:44 PM
		Stamp text
		Draft
		Font style
		Background color
		Timestamp text
		Date format ()
		DD/MM/YYYY h:mm A
	Image	Either JPG or PNG format.
0	File Attachment	Attach any electronic file, double click to download
		ABC COMPANY LIMITED
₽	Call Out	BILL TO Insert text here

e. Edit

lcon	Feature	Description / Sample
t,	Crop Page	

f. Fill and Sign

lcon	Feature	Description / Sample
<u>li</u>	Signature	Please refer to section V (d)
Т	Free Text	Please refer to section V (a)
×	Cross	Paste a cross on a form.
~	Tick	Paste a tick on a form.
	Dot	Paste a dot on a form.
	Stamp	Please refer to section V (d)

Here and the second sec	Calendar	BILL TO
		ADC COMPANY LIMITED 2024-00-01

g. Other Features

lcon	Feature	Description / Sample
	Panel	View page thumbnails, outlines and signature list.
	Control	 View document as continuous page / page by page. Page rotation Page layout as single page / double page
234% ~	Zooming	 Page zoom by percentage Zoom to width, zoom to height Marquee Zoom
\$	Menu	Full screenDownload PDF with / without annotation
Q	Search	Search within the PDF file.

Note: For other documents like Microsoft[®] Office, CAD drawing, any annotation applied are only placed on the document preview version, it will not alert any of the original document.

VI. Check-In and Unlock Document

1. After you check-out a document for editing, you are required to check-in for saving. From the document viewer toolbar, select Edit > Check In.



2. The document is now saved as a new version.

E Home > Samples > Accounting > Invoices > INV24001.pdf <									
습 Edit Relation	Share To Compare	Index Reminde	r Redaction AI Genie						
Index List			150%~ 💬 🕀 🛄			*Ver 2.0 / by Antelo	ipe ~ Q	Q	ŝ
File Name	INV24001.pdf								
Size	152 KB								
Version	2.0	800	ampleCorn						
Version Date	2024-08-31 15:05:46	Sample Sample INV							
Version By	Antelope								
Invoice No.	INV24001	BILL TO ABC (OMPANY LIMITED		Invoice	No. : INV24	001		
Invoice Date	2024-08-12	Flat A	, 10/F, SampleCorp Innovation Tower,		Invoice	Date : 10 th Ju	ne 2024		
Supplier Name	ABC Company	Cause	way Bay,		PO No.	: PO123	016		
PO No.	PO12345	Hong	Kong		Due Da	te: : 10 Ju	IY 2024		
Due Date	2024-09-11								
Total Amount	13560.0000	NO. PARTICULARS QTY (PCS) UNIT PRICE DISCOUNT % AMOUNT				AMOUNT			
Line Items	Details (2)		Desident lange A	2	100.00	0.00	200.00		
		1	Product tem A	2	100.00	0.00	200.00		

3. If you want to discard any changes, select Unlock instead.



VII. Document Version

- 1. A document will have version increment either by one of the following actions:
 - a. A new document is uploaded and overwrite the original one.
 - b. Annotation is applied on the document preview.
 - c. The document is check-out for content editing and check-in again.
 - d. A scanned document is uploaded and converted into searchable PDF.
- 2. To view document version history, select the document, right click to bring up the context menu.

+ New \vee	↑ Upload	Index \checkmark View \checkmark	Change Column View	Recycle Bi	n 🖻 C	< 1 to 1 (Pa	age 1) 🗸 >
□ 〒		Î File Name	Size Version Versi	on Date	Version By	Hash Tag	Invoice No.
	☆ 📩 、	, INV24001.pdf	Preview Edit Add to My Clipboard Relation Route Document Share To Reminder	* 15:09:17 *	7 Jennifer Tam	#ABC #Invoice	INV24001
			Compare History More Cut Copy	Versi Circu	ion History ulation History		

3. The version history window will appear.

Version Hi	istory							×
•				File Name	Version By	Version	Version Date	
	0	D		INV24001.pdf	Jennifer Tam	3.0	2024-08-31 15:09:18	
۲	쑈	Ð	创	INV24001.pdf	Antelope	2.0	2024-08-31 15:05:46	
۲	샹	D	圃	INV24001.pdf	Antelope	1.0	2024-08-31 12:32:15	

4. Depends on your access permission, you can remove older version of documents by clicking the recycle bine icon. $\hat{\blacksquare}$

ersion Hi	istory							×
•				File Name	Version By	Version	Version Date	
	۲	>		📄 INV24001.pdf	Jennifer Tam	3.0	2024-08-31 15:09:18	
۲	쑈	Ð	⑪	INV24001.pdf	Antelope	2.0	2024-08-31 15:05:46	

5. You can also restore the older version of document as the latest one by clicking the restore icon. ⁽⁵⁾

Version H	rsion History							
•				File Name	Version By	Version	Version Date	
	۲	>		📄 INV24001.pdf	Jennifer Tam	4.0	2024-08-31 15:32:39	
۲	公	Ð	⑪	📄 INV24001.pdf	Jennifer Tam	3.0	2024-08-31 15:09:18	
۲	쇼	D	۵	INV24001.pdf	Antelope	2.0	2024-08-31 15:05:46	

VIII. Mark and Revert Final Version

1. To mark a document as final version from further editing, from the document viewer toolbar, select Edit > Mark Final Version.



2. You can also mark as final version by bring up the context menu, select Edit > Mark Final Version.

+ New \vee	↑ Upload	Index \checkmark View \checkmark	Change Column View	w Recycle Bi	n D	C <
<u>_</u>		File Name	Size Version Ver	rsion Date	Version By	Has
	☆ 📩	• INV24001.pdf	Preview	5:32:3	9 Jennifer Tam	#AE
			Edit	• Che	eck Out & Edit	
			Add to My Clipboard	Che	eck Out & Downloa	ad
			Relation	▶ Do	wnload	
			Route Document	Che	eck Out	
			Share To	Ma	rk Final Version	
			Reminder	Up	date Thumbnail	
			Compare	Ade	d Attachment	
			History	•		

3. Once a document is marked as final version, the document is sealed from further editing.

+ New \vee	T Upload	Index \checkmark View \checkmark	Change Column View	v Recycle Bin	B C
- -		File Name	Size Version	Version Date	Version By
	☆ 📩 🗸	INV24001.pdf	152 KB 4.0 (Final)	2024-08-31 15:32:39	Jennifer Tam

4. User with only manage rights or the document owner can revert the final version back to edit mode.

+ New \vee	→ Upload	Index 🗸 Vie	ew 🗸 Chang	ge Column View	Recycle Bin	B C
□ 🔻		File Name	Size	Version	Version Date	Version By
\checkmark	☆ 📩 -	INV24001.pdf	152 KB	4 0 (Final)	2024-08-31 15:32:39	Jennifer Tam
			Preview			
			Edit	+	Download	
			Add to My Clip	poard	Revert Final Version	1
			Relation)		

IX. Minor Version Update

1. To enable minor version of document, select a folder, right click to bring up the context menu, then select "Edit".

> 🗋 Accounting			
> C Agreements	Share To		
> 🗋 Human Resources	Update Thumbnail		
> 🗀 п	More	•	Delete
> 🗋 Logistic	Cut		Edit
> 🗋 Management	Сору		Follow
> 🗋 Marketing			Temporary Permission
> D Office Admin			Permission
> 🗋 Sales			

2. Enable minor version, then click the blue "Update" button to save changes.

Edit	Update	×
General Advance		
Rule		
		~
Filter Owner		
OFF		
Minor Version		
Max. Major Version		
Max. Major Version		
Max. Major Version 0 Max. Minor Version		

3. Once minor version is enabled, document upload to the folder will start from Version 0.1.

+ New \sim		Index \checkmark View \vee Change Column View	/ Recy	cle Bin	0
□ ▼		File Name	Size	Version	Version Date
\checkmark	습 🚾 🗸	Non-disclosure agreement.docx	85 KB	0.1	2024-09-01 01:28:31
	☆ 📩 🗸	Non-disclosure agreement.pdf	76 KB	1.0	2024-06-21 15:07:06
	습 📩 🗸	Real Estate Purchase Agreement.pdf	227 KB	1.0	2024-06-28 13:28:14

4. Whenever there are any changes, the version number will increment by 0.1.

Version His	itory						
F				File Name	Version By	Version	Version Date
	۲	>		Non-disclosure agreement.docx	Jennifer Tam	0.2	2024-09-01 01:29:43
۲	盎	Ð	Û	Non-disclosure agreement.docx	Jennifer Tam	0.1	2024-09-01 01:28:32

Note: User accounts without "manage" permission on the folder are not able to see the minor version of any documents, except the document owner himself/herself.

X. Publish Version

1. To public a minor version of document as major version, select the document, right click to bring up the context menu, then select "Edit > Publish".

+ New \sim	↑ Upload	Index $ \lor $ View $ \lor $ Change Col	umn View Recycle Bin	6	
		Î File Name	Size Versior	Version Date	Version By
\checkmark	☆ 🖤	Non-disclosure agreement.docx	Preview	24-09-01 01:29:43	Jennifer Tam
	☆ 📩	 Non-disclosure agreement.pdf 	Edit	* Chack Out 9 E	dit
	12 PCF	 Real Estate Purchase Agreement.pd 	Add to My Clipboard	Download	uit i
	☆ 💼	Residential Lease Agreement.pdf	Relation	Check Out	,
	습 📷	Sample Purchase Agreement of HR	Route Document	Publish	1
	습 w	Sample Purchase Agreement.docx	Share To	Mark Final Ver	sion Tam
			Reminder	Convert To PD	F

2. Once the document is published, the version number will become 1.0.

+ New \vee	T Upload	Index \checkmark View \checkmark Change Column View	Recycle Bir	n ©	
□ ▼		[†] File Name	Size Versi	ion Version Date	Version By
\checkmark	☆ w -	Non-disclosure agreement.docx	85 KB	1.0 2024-09-01 01:29:43	Jennifer Tam
	습 📩 🔹	Non-disclosure agreement.pdf	76 KB	1.0 2024-06-21 15:07:06	Antelope

3. For any further modification, the document version will increment by 0.1.

+ New \vee	↑ Uple	oad	Inde	ex ∨	View	\sim	Change Column Viev	v Recy	cle Bin	8	
□ 〒			T	File Na	ime			Size	Version	Version Date	Version By
		v .	- N	on-disc	losure a	green	nent.docx	85 KB	1.1	2024-09-01 01:33:34	Jennifer Tam
		PCF	N	on-disc	losure a	green	nent.pdf	76 KB	1.0	2024-06-21 15:07:06	Antelope

4. Until the document is published to major version.

+ New \sim	T Upload	I	ndex \checkmark	View $\!$	Change Column View	Recy	cle Bin	D	
			File Nar	ne		Size	Version	Version Date	Version By
\checkmark	☆ 🖤	•	Non-discl	osure agreem	ent.docx	85 KB	2.0	2024-09-01 01:33:34	Jennifer Tam
	☆ 💼	•	Non-discle	osure agreem	ent.pdf	76 KB	1.0	2024-06-21 15:07:06	Antelope

XI. Update Thumbnail

- 1. By default, some document types such as PDF, Microsoft Office documents and images can render with thumbnail view. In case some special document types which cannot be rendered and would like to have a thumbnail, you can upload a thumbnail image.
- Select the document from the document list, right click the bring up the context menu. Select Edit > Update Thumbnail.

+ New \vee	→ Upload	Index \checkmark View \checkmark	Change Column Viev	v Red	cycle Bin	6	
		Î File Name	Size Version	Version	n Date	Version By	
	☆ 📩	INV24001.pdf	Preview)(8-31 15:32:39	Jennifer Tam	
			Edit	•	Check Out & Edit		
			Add to My Clipboard	Check Out & Download		k Download	
			Relation	•	Download		
			Route Document		Check Out		
			Share To	•	Mark Final V	ersion	
			Reminder		Update Thu	mbnail	
			Compare		Add Attachr	nent	
			History	- F -			

3. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click "Upload" button.

Update Thumbnail	Upload ×
Browse	20 MB JPEG File Only (500 x 500px)
File Name:	×

4. Click the blue Upload button to commit changes.

XII. Copy Document

1. To copy a document, select the document from the document list, right click to bring up the context menu, select Copy.

+ New \vee	↑ Upload	Index \checkmark View	✓ Change Column	View Recycle Bin 🔋	
- -		File Name	Size Version	Version Date Version By	
	☆ 📑 🗸	INV24001.pdf	Preview Edit Add to My Clipboard Relation Route Document Share To Reminder Compare	4-08-31 15:32:39 Jennifer Tam	
			More Cut Copy	> >	

2. Select the destination folder you want to paste, right click to bring up the context menu, select Paste.

→ C Samples										
~ 🗀 Accounting										
> invoice (2024)	Paste Link									
Invoices	Share To									
> D Purchase Orders	Update Thumbnail									
> C Agreements	More	F								
> 🗋 Human Resources	Cut									
> 🗀 п	Сору									
> 🗋 Logistic	Paste									
> C Management										

3. Both the document and index are pasted in the destination folder. Be notice that only the latest version will be copied and pasted.

≡ ⓐ	Na	ame V Keyword Search		× Q	
Home > Samples > Accounting > Invoic	e (2024)				
Folders	+ New ∨ ↑ Upload	Index \checkmark View \checkmark	Change Column Viev	v Recycle Bin	
> D QC Profile A (Cojack)	□ -	File Name	Size Version	Version Date Version By	
CC Profile B (Eric Chan) CC Profile C (Kelvin) CC Profile D (Wilson) CC Profile D (Wilson) CC Profile E (Patrick)	□ ☆ → ○	 INV24001.pdf 	152 KB 1.0	2024-08-31 15:57:39 Jennifer Tam	
 Samples Accounting 					
> D Invoice (2024)					
 Invoices Purchase Orders 					

XIII. Copy and Paste Index

 You can only copy the document index and paste onto another document profile only. For example, in the following case, the invoice in "Invoice (2024)" folder is well indexed, while the latter one contains only the document name.

≡ ⓐ	Name 👻 Keyword Sea	h		🐔 😯 🙁 -
Home > Samples > Accounting > Invoice	(2024)			Ç
Folders	+ New \checkmark \checkmark Upload Index \checkmark View	Change Column View Recycle Bin	10	C ⁴ < 1 to 1 (Page 1) ~ >
> D QC Profile A (Cojack)	Tile Name	ize Version Version Date	Version By Hash Tag	Invoice No. Invoice Date
> C QC Profile B (Eric Chan)	🗌 🏠 🎥 🗸 INV24001.pdf	152 KB 1.0 2024-08-31 15:57:39	Jennifer Tam #Invoice #2	024 INV24001 2024-08-12
QC Profile C (Kelvin)				
> C QC Profile E (Patrick)				
~ 🗋 Samples				
~ 🗋 Accounting				
> [] Invoice (2024)				
Invoices Purchase Orders				

≡ 🗿	Nam	e V Keyword Search	×		A 🛛 🔍
Home > Samples > Accounting > Invoices					Ţ
Folders	+ New \checkmark $\overline{\uparrow}$ Upload	Index \checkmark View \checkmark	Change Column View Recycle Bin	10	C ^{II} < 1 to 1 (Page 1) → >
> D QC Profile A (Cojack)	□ ▼	File Name Size	Version Version Date	Version By Hash Tag	Invoice No. Invoice Date
> C QC Profile B (Eric Chan)	🗆 🗠 📩 🗸	329512.pdf 123 K	B 1.0 2024-08-31 16:00:23	Jennifer Tam	
QC Profile C (Kelvin)					
QC Profile E (Patrick)					
~ 🗋 Samples					
~ 🗋 Accounting					
> 🗋 Invoice (2024)					
C Invoices					
> D Purchase Orders					

2. Copy the source document.

≡ ⓐ		Name V Keyword S	iearch	×	۹		7	r 0 .
Home > Samples > Accounting > Invoic	ce (2024)							Ŷ
Folders	+ New \checkmark T Upload	Index \checkmark View	w $ arsigma$ Change Column	View Recycle Bin	1	G	< 1 to 1 (Page 1) 🗸 🗦
> D QC Profile A (Cojack)	□ 〒	File Name	Size Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date
 > QC Profile B (Eric Chan) > QC Profile C (Kelvin) > QC Profile C (Kelvin) > QC Profile E (Patrick) > Samples > Accounting > Invoice (2024) Invoices > Purchase Orders > Agreements > Human Resources > Π 	🖬 🌣 📩	↓ INV24001.pdf	Preview Edit Add to My Clipboa Relation Route Document Share To Reminder Compare History More Cut Copy	nn	Jennifer Tam	#Invoice #2024	INV24001	2024-08-12

3. Select the destination document, right click the bring up the context menu, select More > Paste Index.

≡ ⓐ	Name	earch	×q		ŕ	?
Home > Samples > Accounting > Invoices	5					Ç
Folders	+ New \checkmark $\overline{\uparrow}$ Upload Index \checkmark View	✓ Change Column View R	tecycle Bin	G	< 1 to 1 (Pag	ge 1) 🗸 🗦
> D QC Profile A (Cojack)	File Name	Size Version Version D	ate Version By	Hash Tag	Invoice No.	Invoice Date
 > C Profile B (Eric Chan) > C Profile C (Kelvin) > C Profile D (Wilson) > C Profile D (Wilson) > C Profile E (Patrick) > Samples > Accounting > Invoice (2024) Invoices > Purchase Orders 	🗹 🏠 🖕 329512.pdf	Preview Edit Add to My Clipboard Relation Route Document Share To Reminder Compare History Free State S	1 16:00:23 Jennifer Tam			
 Agreements Human Resources IT Logistic Management Marketing Office Admin Sales 		More Cut Copy	Document Properties Follow Temporary Permission Paste Index Delete Permission Audit Log			

4. The destination document is now indexed with the original one.

≡ (a)	Na	me 🗸 Keyword Search	×Q		≈ 0 ®•
Home > Samples > Accounting > Invoice	es				Ģ
Folders	+ New 🗸 🕴 T Upload	Index \checkmark View \checkmark Change C	Column View Recycle Bin	G <	1 to 1 (Page 1) ~ >
> D QC Profile A (Cojack)		File Name Size Versio	n Version Date Version By	Hash Tag Inv	oice No. Invoice Date
> D QC Profile B (Eric Chan)	🔽 🕁 🍰 .	329512.pdf 123 KB	1.0 2024-08-31 16:00:23 Jennifer Tam	INV	24001 2024-08-12
> D QC Profile C (Kelvin)					
> D QC Profile D (Wilson)					
> QC Profile E (Patrick)					
✓ □ Samples					
 Accounting Invoice (2024) 					
> D Purchase Orders					

XIV.Delete Document

1. To delete a document, right click to bring up the context menu, select More > Delete.

T File Name	e Size Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date
✓ ☆ → INV24001.p	df Preview Edit Add to My Clipbo Relation Route Document Share To Reminder Compare History	81 15:57	:39 Jennifer Tam	#Invoice #2024	INV24001	2024-08-12
	More Cut Copy	Docu Follo Temp Delet Perm	iment Properties w porary Permission te ission			
		Audit	t Log			

2. A confirmation message will ask you for deleting. Choose Yes. The document will be put into Recycle Bin.

XV. Move Document

- 1. To move a document, drag and drop the document(s) from one folder to another. Bear in mind that you cannot drag either folder or document to the root (e.g. Home).
- 2. If the document profile between the source and destination folders are difference, some document index may not be able to inherit.

XVI. Add Attachment

1. To add an attachment, select the document, right-click to bring up the context menu, and then select Edit > Add Attachment.

			1						
· · ·			File Name	Size	Version	Version	Date	Version By	
\checkmark	☆	-	INV24001.pdf	Previ	ew		-31 15:57:39	Jennifer Tam	#
				Edit			Check Out	t & Edit	
				Add Relat Route Share Remi Com	to My Clipboard ion e Document e To nder pare	•	Check Ou Download Check Ou Mark Fina Update Th Add Attac	t & Download t I Version numbnail hment	
				More Cut Copy	, ,				

2. Browse the file to upload.

Upload Docun	nent	Upload	×
Brov	vse	(20 MB Only)	
File Name:	PO-150034.pdf		×
Larger file(s)	can be uploaded through MS Of	fice Plug-in or Drag and Drop.	

3. A clip icon will appear in the document. You can add multiple attachments to a single document.

+ New \vee	•	ΤU	pload		Index	\sim	View	\sim	Change Colu	imn	View Recycle Bin	Do
□ 〒					1 File	Nam	e	Size	Version		Version Date	Version By
	Ø	☆	POF	-	INV2	4001.p	df	152 KI	В	1.0	2024-08-31 15:57:39	Jennifer Tam

XVII. View Attachment

1. To view the attachment, open the document for preview.

Ξ	Home >	Samples >	Accounting >	Invoice (2024)) > INV2400)1.pdf							<	>	ø	×
	Edit	Relation	Share To	Compare	Index	Reminder	Reda	iction AI Genie								
Index	List				Attachme	ent 📑	PO-15	0034.pdf								
File Na	me		INV24001.pdf			15	0%~	⊖ ⊕ ⊕ □			Ver 1.0	/ by Jennifer Tam	~	Q	ø	愈
Size			152 KB													
Version	1		1.0													- 1
Version	Date		2024-08-31 1	5:57:39			A									- 1
Version	ву		Jennifer Tam			2	O R8	ampleCorp				INVOICE				- 1
Hash Ta	ag		#Invoice #202	4								INVOICE				- 1
Invoice	No.		INV24001				BILL TO):								- 1
Invoice	Date		2024-08-12				ABC C	COMPANY LIMITED		Invoice	No. : INV24	4001 ma 2024				- 1
PO No.			PO12345				Cause	vay Bay,		PO No.	: PO12	3016				- 1
Due Da	ate		2024-09-11				Hong	Kong		Due Dat	e: : 10 th Ju	ly 2024				- 1
Supplie	er Name		ABC Company	6												- 1
Total A	mount		0.0000				110	DI DITICUTI I DO	OTH (BCO)		DISCOURTS		1			- 1
Line Ite	ms		Details				NO.	PARTICULARS	QTY (PCS)	UNIT PRICE	DISCOUNT %	AMOUNT				- 1
New Fie	eld						1	Product Item A	2	100.00	0.00	200.00				- 1
							2	Product Item B	1	100.00	0.00	100.00				

2. The attachment is display above the annotation toolbar.

Attachment	PO-15	0034.	pdf			
	150% ~	Θ	\oplus	Ð	С1	

3. Click the attachment name to open for preview.

≡ +	Home >	Samples >	Accounting > I	Invoice (2024)	> INV2400	1.pdf > PO-	150034A.p	odf										
			Share To		Index													
Index Li	st			×		1	150% ~	⊖ ⊕	Ð	П			١	/er 1.0 / by Jennifer Tam	~	Q	þ	¢
File Nam	ie		PO-150034.pd	f														
Size			476 KB															
Version			1.0				A	Cam	aloCo	m								
Version D	Date		2024-08-31 16	:13:17			de p	Sam	innova	tion			PI	JRCHASE ORDER				
Version B	зy																	
Hash Tag	1						Custor	ner Name			Payment:		PO No.	PO-150036				
							TAI CI	IAN JEW	ELLERY		30 DAYS		PO Date	2015-07-03				
													Quotation No.	QUO-0027				
													Currency	HKD				
										-								
							Item	#		Des	scription	Qty	Price	Extended Price				
							1522	2 Les	Grands Ch	enes N	1edoc CB 2011 3-Pack	1	\$540.00	\$540.00				
							1510) Feud	lo Maccari	Saia S	Sicilla 2011 6-Pack	2	\$1,308.00	\$2,616.00				- 1
							1503	Beau	irenard Ra	steau V	Village 2011 3-Pack	1	\$534.00	\$534.00				
							1489	D'A	renberg Th	ne Lau	ghing Magple 2010	1	\$1,128.00	\$2,256.00				
													Grand Total	\$5,946.00				

Note: You can only share and rename attachment.

XVIII.Add to My Clipboard

1. To add a document to clipboard, select the document, right click to bring up the context menu, then select "Add to My Clipboard".

+ New \checkmark $\overline{\uparrow}$ Upload	Index \checkmark View	✓ Change Column	View Recycle Bin	Do
	Î File Name	Size Version	Version Date	Version By
🗸 🖉 🕁 📩 🗸	INV24001.pdf	152 KR 1.0	2024-08-31 15:57:39	Jennifer Tam
		Preview		
		Edit	>	
		Add to My Clipboar	d	
		Relation	*	
		Route Document		
		Share To	*	

2. You can add multiple documents to clipboard.

≡ 🕄			N	ame 🖌 Keyword Sea	irch		×			*	? ® -
Quick Access > My Clipboard											Ŷ
Folders	1								G <	1 to 2 (Page 1) ~ >
✓				[†] File Name	Size	Version	Version Date	Version By	Folder Path		
My Check Out		Ø	-	INV24001.pdf	152 KB	1.0	2024-08-31 15:57:39	Jennifer Tam	Home\Samples\Accountin	g\Invoice (2024)
My Favorites			2	Sample.pptx	687 KB	1.0	2024-08-31 12:34:55	Antelope	Home\QC Profile A (Cojac	k)	
My Clipboard											
Recent Open Documents											
Personal Folder	Personal Folder										

Note: My Clipboard only stores documents temporarily, like search history. It will be cleared once you refresh your page or log out.

O. Document Relation

I. Copy Link

To link up two documents, you can use the document link features. For example, if you want to establish a link which "connect" a purchase order to an invoice, select "Relation > Copy Link" from the context menu.

+ New \vee	T Upload	Index \checkmark View \checkmark	Change Column View Red	cycle Bin 🛛 🗟	
		File Name	Size Version	Version Date	Version By
		PO-150001.pdf	Preview	-07-08 11:35:14	Antelope
		PO-150003.pdf	Edit Add to My Clipboard	-07-08 11:35:14	Antelope
			Relation	Copy Link	
			Route Document Share To Reminder	Linked Relati Group Docur	ons ment
			Compare	*	

2. Select the destination document, right click to bring up the context menu, then select "Relation > Paste Link".

+ New \vee	T Upload	Index 🗸 View	∨ c	hange Column View	Recycle	Bin 🕑	(
□ ₹		File Name	Size	Version Versio	on Date	Version By	Hash Tag
✓	ti ≥	✓ INV24001.pdf	152 KR	1 0 2024-0 Preview Edit Add to My Clipboard	08-31 15:57 ⊧	39 Jennifer Tam	#Invoice #2024
				Relation Route Document	•	Copy Link Paste Link	
				Share To Reminder Compare	> >	Linked Relations Group Document	

3. A virtual link is established.

+ New \sim		Tυ	pload	1	Index	\sim	View	\sim (Change Colu	ımn	View	Recycle Bin	D
					1 File	e Name	e	Size	Version		Version I	Date	Version By
	0	습	POF	•	INV2	4001.p	df	152 KE	3	1.0	2024-08-	31 15:57:39	Jennifer Tam

II. Link Relation

1. To view the link relation, select the destination document, right click to bring up the context menu, then select "Relation > Linked Relations".



2. The Linked Relations window display all virtual linkage to the document. You can preview, shared and delete the linkage.

Linke	d Rela	tions					X	×
					File Name	Folder Path		
• û r 🛛 💦		D	PO-150001.pdf	Home\Samples\Accoun	ting\Pur			

III. Group Document

1. You can group multiple document type into a single PDF file by Group Document. This feature only support DOC, DOCX, XLS, XLSX, PPT, PPTX, RTF and PDF format.

2. Select the documents you want to group together, right click the bring up the context menu, select "Relations > Group Document".

Group Document	>	×
The following files will be grouped as a new PDF File(support Word, Excel, PowerPoint & PDF only)		
Word.rtf Version 1.0 2024-08-31 13:50:25	×	
2023年月度保留销售总结报告.xlsx. Version 1.0 2024-08-31 12:33:49	×	
NV24001.pdf Version 1.0 2024-08-31 16:01:31	×	
PowerPoint.ppt Version 1.0 2024-08-31 13:50:26	×	
Word.doc Add More Ge	enerate	

3. Rearrange the document sequence to group, then click the blue "Generate" button.

File Name	Size	Version	Version Date	Hash Tag	Version By	
Accounting			2024-06-28 13:58:40			
Agreements			2024-08-28 21:28:30			
Human Resources			2024-06-28 13:58:57			
π			2024-06-28 13:59:05			
Logistic			2024-07-08 11:38:13			
Management			2024-08-28 09:10:12			
Marketing			2024-07-08 11:38:00			
Office Admin			2024-06-28 13:59:18			
Salec			2024-07-08 11:38:19			

4. Select the destination folder and input a document name, click the "tick" button to save.

5. Once the document is generated, you can preview the document with thumbnail enabled. All "component documents" are displayed as virtual linkage.



6. You can further modify the group document by adding or removing the components.

\checkmark	0	습	and the second	•	Proposal 2024.pdf	1 MB	1 0 2024-08-31 17.00	r02	Jennifer Tam
							Preview Edit Add to My Clipboard	×	
							Relation Route Document Share To Reminder	•	Copy Link Linked Relations Modify Group Document

7. In this case, we removed the Excel spreadsheet, RTF file and the PDF. Finally click the blue "Re-Generate" button.

Group Document		×
The following files wi	ll be grouped as a new PDF File(support Word, Excel, PowerPoint & PDF only)	
P≝	PowerPoint.ppt Version 1.0 2024-08-31 13:50:26	×
w	Word.doc Version 1.0 2024-08-31 13:50:26	×
	Add More Re-G	enerate

P. Route Document

I. Create New Routing

1. You can route a document for single-step approval or review without setting up a workflow diagram. Select "Route Document" from the context menu.

$+$ New \vee		Index 🗸 View	∨ Cł	nange Column	View Recycle Bin	B
		File Name	Size	Version	Version Date	Version By
\checkmark	☆ 📩	INV24001.pdf	152 KB	1.0	2024-08-31 15:57:39	Jennifer Tam
			Previe	W		
			Edit		×	
			Add to	o My Clipboard	l.	
			Relatio	on		
			Route	Document		
			Share	То	.	

2. The Route Document window will appear. Select the priority with either Low, Normal, High or Top.

Document Workflow					Next		×
Workflow Template	Adhoc routing	~	Priority	Normal		~	
To :							

3. Select the recipient(s) either by user account or user group.

Document Workflow				Next	×
Workflow Template	Adhoc routing ~	Priority	Normal	~	.]
To :	Jennifer Tam;User1				

4. Input both the Subject and Body. The subject will appear in both email and Workflow Inbox, while the Body will appear in email notification.

Document Workflow	Next	×
Workflow Template	Adhoc routing ~ Priority Normal ~	
To :	Jennifer Tam;User1	
Subject :	Please review the Invoice	
Body :	I will send the invoice to ABC Company this Tuesday, please review and approve.	

5. Select the Due Date and Cancel After Date. If your recipients do not response to your request, the system will keep sending email reminder every midnight until it reaches the "Cancel After" date.

Due before :	2024-09-03	
Cancel after :	2024-09-06	

6. There are several types of action for routing.

Туре	Description	Action Buttons
Collaborate	When the recipient receives this request,	Reply, Completed
	they can make changes on the	
	documents or place annotation, send	
	back to the originator to and fro. Until	
	the originator confirmed completed.	
Approve	Approve or reject the document.	Approve, Reject
Review	Ask for review only	Reviewed
Notification	Ask for read notification.	Read

7. The scope will take effect when there are more than one recipient.

Scope	Description
All	All recipients must reply or approve (in case the type is approval
	request).
Major	Over or equal to 50% of recipients reply or approve.
Any	Any one of the recipients reply or approve.

Туре :	Notification	~
Scope :	Any	~

8. In case you want the recipient to receive the document as attachment in the email notification, please check on this option. Bear in mind if the document size is over a certain limit, the recipient email server may not be able to receive.

Include original :	
--------------------	--

Q. Sharing

I. Share to Internal

1. To share a document link to internal user, select "Share To > Internal".

+ New \vee	↑ Upload	Index $ \smallsetminus $	View $ \smallsetminus $	Change	e Column '	View	Recycle Bin	bo
□ ▼		File Nan	ne	Size	Version	Vers	ion Date	Version By
	☆ 📩	- INV24003	(2).ndf	127 20	10	2024	-09-10 23:03:47	Wing
			Edit Add to Relati Route	o My Clipb on Documen	oard) }		
			Share	То		*	Internal	
			Remir	lder			Share to Guest	t.
			Comp	are				
			Histor	У		•		

2. Your default email client will bring up with the document link being pasted in the email body, for example:

https://apac.antelopecloud.net/demo/main.aspx?sId=MPMBJNACIPIJPINGKKLXXXX

3. Bear in mind user account without access permission cannot access the document content even with the document link.

II. Share to Guest

1. To share a document link to guest, select "Share To > Share to Guest".

- T				Tile	Name			Size	Ve
	☆	w	•	EP-004	12			13 KB	
\checkmark	☆	w	-	EP-00	Proviou			13 KB	
	☆	w	*	EP-00	Fleview			13 KB	
	☆	w	•	EP-00	Add to My Clipboard			13 KB	
					Relation				
					Route Document				
					Share To	+	Internal		
					Reminder		Share to Guest		
					Compare	•			
					History	÷			
					More	- F			
					Cut				
					Сору				

 The Share to Guest window will appear. Input a 12-digits password, the password should contain at least 1 upper letter, 1 lower letter and 1 numeric letter. Select the date range. Finally click the "Generate Link & Send" button.

Share to Guest			×
Password			
	At least 12 cha	racters with at least 1 uppe	r letter, 1 lower letter and 1 numeric letter
Link Valid	2024-09-10	To 2024-09-15	
File Link			
			Generate Link & Send

3. Once the document link is generated, you can copy the link by clicking the $\overset{\checkmark}{=}$ icon.

Share to Guest			×
Password			
	At least 12 cha	aracters with at least 1 upper letter, 1 lower letter	and 1 numeric letter
Link Valid	2024-09-10	To 2024-09-16	
File Link	S		
		Remove Link	I

4. To remove the shared link, click the blue "Remove Link" button.

Noted: Unlike Share to Internal, the external share link to guest only shares the "current version" of document. In case there is a newer version of document published, you are required to generate a new share link again.

5. Once your recipient receives the email, they can download the document.

Document Download Link						
w	wing.mak@antelope.asia <wing.mak@antelope.asia> To: jennifer@antelope.asia</wing.mak@antelope.asia>					
Dear Jer	nnifer,					
Download link as below. Thanks. https://apac.antelopecloud.net/internalqc/getfile/PPILAADOGAEIAJLHOMDBMGAKJNKEIMKI/						
Best reg Wing	ards,					

III. My Shared Links to External

1. While you may share different documents to different guests, you can centralize manage all your share links through "My Shared Links to Guest"

A 0 🧐	9-
My Account	
My Shared Links to Guest	
My Reminder Record	3
My Workflow Delegation	

2. You can copy or remove the shared link at any time.

My Shared Links to Guest								(B)	×
Þ		File Name	Folder Path	Shared Version	Link Created On	Set Password	Period From	Period To	
Ø	Û	PO-150001.pdf	Home\Samples\Accounting\Purchase Orders	1.0	2024-08-31	•			
Ø	Û	INV24001.pdf	Home\Samples\Accounting\Invoice (2024)	1.0	2024-08-31	0	2024-08-31	2024-09-06	

R. Reminder

- I. Create New Reminder
 - 1. To create reminder schedule, select "Reminder" from the context menu.

+ New \vee		Index \checkmark View	~ C	hange Column View	w Recycle Bin	Do
-		File Name	Size	Version Ve	rsion Date	Version By
\checkmark	☆ 📩	INV24001.pdf	152 KB	Preview	:39	Jennifer Tam
				Edit	÷.	
				Add to My Clipb	oard	
				Relation	× .	
				Route Documen	t	
				Share To	<u></u>	
				Reminder		
				Compare	•	

2. The Reminder window will appear.

Reminder				
×	Initiator	Follow-up Party	Other Related Parties	Reminder Date
÷				

3. Select the user account for follow-up (To) and other related parties (cc), reminder date and follow-up action.

Reminder										
•	Initiator	Follow-up Party	Other Related Parties	Reminder Date	Follow-up Action	Status				
Ð		Wing	User1	2024-09-13						
					Send to ABC customer					

- 4. Click add icon to commit changes.
- 5. A new reminder record for the document is created. Both Wing and User1 will receive an email reminder on the selected date.

Reminder									
F	Initiator	Follow-up Party	Other Related Parties	Reminder Date	Follow-up Action	Status	Last Edited On	Last Edited By	
÷									
6 🛍 V	Wing	Wing	User1	2024-09-13	Send to ABC customer	Upcoming	2024-09-10	Wing	
Workfi To: w Please be inform	workflow@system.com <workflow@system.com> To: wing.mak@antelope.asia Please be informed that a reminder is newly created for an eDMS document as follows.</workflow@system.com>								
File Name		INV07	720_001.pdf: ht	tps://apac.antel	opecloud.net/internalqc/De	ocView.aspx?sI	<u>d=3598</u>		
Initiator		Wing							
Follow-up Par	ty	Wing							
Other Related	Other Related Parties User1								
Reminder Date	Reminder Date 2024-09-13								
Follow-up Act	Follow-up Action Send to ABC customer								
System No.		[syster	nNo]						

II. My Reminder Record

1. While you may set different reminders, you can centralize manage all your reminder schedules through "My Reminder Record".

A 9 🧕	-
My Account	
My Shared Links to Guest	
My Reminder Record	9
My Workflow Delegation	

2. Within the "My Reminder Record" window, you can change the schedule details including recipients, reminder date and follow up actions.

My Reminder Record											
×		File Name	Folder Path	1 Initiator	Follow-up Party	Other Related Parties	Reminder Date	e Follow-up Action	Status	Last Edited On	Last Edited By
8	Ô	INV0720_001.pdf	Home\Accounting	g Wing	Wing	User1	2024-09-13	Send to ABC customer	Upcoming	2024-09-10	Wing

3. To delete the reminder, click the recycle bin icon.

S. Compare

- I. Text Compare
 - 1. To compare two documents in plain text mode, select "Compare > Text Compare".



2. A two-sided document viewer will appear.

Sample Purchase Agreement.docx(2.0)	✓ Sample Purchase Agreement.docx(2.0) ✓
0	1
SAMPLE PURCHASING AGREEEMNT	3 SAMPLE PURCHASING AGREEEMNT
This Purchasing Agreement ("Agreement") is entered into by and between Company A,	re 5 This Purchasing Agreement ("Agreement") is entered into by and between Company A, re
WHEREAS, ABC Company desires to purchase a Human Resource Management System (HRMS) f 7 WHEREAS, ABC Company desires to purchase a Human Resource Management System (HRMS) f
WHEREAS, DEF Company is willing to provide the HRMS to Company A, subject to the	ter 9 WHEREAS, DEF Company is willing to provide the HRMS to Company A, subject to the ter
NOW, THEREFORE, in consideration of the mutual covenants and promises contained h	ere 1 NOW, THEREFORE, in consideration of the mutual covenants and promises contained here
1. Date of Agreement:	3 1. Date of Agreement:
This Agreement is effective as of 11th October 2024.	5 This Agreement is effective as of 11th October 2024.
2. Scope of Work:	7 2. Scope of Work:
DEF Company shall provide ABC Company with a fully functional Human Resource Manage	gem 9 DEF Company shall provide ABC Company with a fully functional Human Resource Managem
3. Price and Payment Terms:	3. Price and Payment Terms:
a. The total purchase price for the HRMS is agreed upon as \$400,000.00.	a. The total purchase price for the HRMS is agreed upon as \$400,000.00.
b. ABC Company shall make the first payment of \$100,000.00 on the date of 12th N	b. ABC Company shall make the first payment of \$100,000.00 on the date of 12th Nove
c. The remaining balance shall be paid by ABC Company to DEF Company in 10 equal	in 7 c. The remaining balance shall be paid by ABC Company to DEF Company in 10 equal in
d. All payments shall be made in HONG KONG DOLLARS to the bank account specified	by 9 d. All payments shall be made in HONG KONG DOLLARS to the bank account specified by
4. Delivery and Installation:	4. Delivery and Installation:

3. Select different versions on both sides.



4. The documents will highlight for any difference between the two versions.

le Purchase Agreement.docx(2.0)	Sample Purchase Agreement.docx(1.0)			
2 3 SAMPLE PURCHASING AGREEENNT	3 SAMPLE PURCHASING AGREEDWT			
5 This Purchasing Agreement ("Agreement") is entered into by and between Company A	5 This Purchasing Agreement ("Agreement") is entered into by and between Company A,			
WHEREAS, ABC Company desires to purchase a Human Resource Management System (HR)	WHEREAS, Company A desires to purchase a Human Resource Management System (HRMS)			
9 WHEREAS, DEF Company is willing to provide the HRMS to Company A, subject to the	9 WHEREAS, Company B is willing to provide the HRMS to Company A, subject to the to			
1 NOW, THEREFORE, in consideration of the mutual covenants and promises contained 2	11 NOW, THEREFORE, in consideration of the mutual covenants and promises contained 12			
3 1. Date of Agreement:	13 1. Date of Agreement:			
5 This Agreement is effective as of 11th October 2024.	15 This Agreement is effective as of 11th October 2023.			
7 2. Scope of Work:	17 2. Scope of Work: 18			
9 DEF Company shall provide ABC Company with a fully functional Human Resource Man 8	19 Company B shall provide Company & with a fully functional Human Resource Managem 20			
 Price and Payment Terms: 	21 3. Price and Payment Terms: 22			
a. The total purchase price for the HRMS is agreed upon as \$400,000.00.	23 a. The total purchase price for the HRMS is agreed upon as \$400,000.00. 24			
5 b. ABC Company shall make the first payment of \$100,000.00 on the date of 12th 6	25 b. Company A shall make the first payment of \$100,000.00 on the date of 12th Nor 26			
7 c. The remaining balance shall be paid by ABC Company to DEF Company in 10 equa	27 c. The remaining balance shall be paid by Company A to Company B in 10 equal in 28			
9 d. All payments shall be made in HONG KONG DOLLARS to the bank account specific 8	29 d. All payments shall be made in HONG KONG DOLLARS to the bank account specifie 30			
4. Delivery and Installation:	31 4. Delivery and Installation:			

T. Document Audit Log

I. Document Audit Log

1. To view a document audit log, select the document, right click to bring up the context menu, then select "More > Audit Log".

 Non-disclosure agreement.docx Non-disclosure agreement.pdf Real Estate Purchase Agreement.pdf Residential Lease Agreement.pdf Sample Purchase Agreement of I Sample Purchase Agreement.docx 	Preview Edit Add to My Clipboard Relation Route Document Share To Reminder Compare History	2024-09-01 01:33:34 Jennifer Tam 2024-06-21 15:07:06 Antelope 2024-06-28 13:28:14 Antelope 2024-06-28 13:28:21 Antelope 2024-06-21 14:54:52 Antelope 2024-06-21 14:54:52 Antelope 2024-09-01 01:16:25 Jennifer Tam
	More Cut Copy	Document Properties Follow Temporary Permission Delete Permission Audit Log

2. The document audit log window will appear.

Log	type						
Docu		Log Date	Owner	IP address	Original Value	New Value	
	ument - Publish	2024-09-01 01:34:39	Jennifer Tam	172.31.5.29	Version=1.1	Version=2.0	
Previ	riew - Update	2024-09-01 01:33:41	Document Service Account	::1			
Thur	mbnail - Update	2024-09-01 01:33:40	Document Service Account	::1			
Thur	mbnail - Update	2024-09-01 01:33:40	Document Service Account	::1			
Docu	ument - Access Content	2024-09-01 01:33:37	Indexing Service Account	EC2AMAZ-JM0	6. ·	Version=1.1	
Docu	ument - Access Content	2024-09-01 01:33:35	Document Service Account	:1		Version=1.1	
Docu	ument - Check In	2024-09-01 01:33:35	Jennifer Tam	172.31.5.29	Version=1.1	Version=1.1	
Docu	ument - Check Out	2024-09-01 01:33:34	Jennifer Tam	172.31.5.29	Version=1.0		
Docu	ument - Publish	2024-09-01 01:32:43	Jennifer Tam	172.31.5.29	Version=0.2	Version=1.0	
Previ	view - Update	2024-09-01 01:29:51	Document Service Account	::1			
Thur	mbnail - Update	2024-09-01 01:29:50	Document Service Account	::1			
Thur	mbnail - Update	2024-09-01 01:29:49	Document Service Account	::1			
Docu	ument - Access Content	2024-09-01 01:29:45	Indexing Service Account	EC2AMAZ-JM0	N	Version=0.2	
Docu	ument - Access Content	2024-09-01 01:29:45	Document Service Account	::1		Version=0.2	
Docu	ument - Check In	2024-09-01 01:29:43	Jennifer Tam	172.31.31.146	Version=0.2	Version=0.2	
Docu	ument - Check Out	2024-09-01 01:29:43	Jennifer Tam	172.31.31.146	Version=0.1		
Previ	riew - Update	2024-09-01 01:28:40	Document Service Account	::1			
Thur	mbnail - Update	2024-09-01 01:28:39	Document Service Account	::1			
Thun	mbnail - Update	2024-09-01 01:28:38	Document Service Account	::1			
Docu	ument - Access Content	2024-09-01 01:28:35	Indexing Service Account	EC2AMAZ-JM0	6	Version=0.1	
Docu	ument - Access Content	2024-09-01 01:28:34	Document Service Account	::1		Version=0.1	
	ument - Create	2024-09-01 01:28:32	Jennifer Tam	172.31.31.146			

- 3. The audit log contains information including log type, log date, document owner, IP address, original value and new value.
- 4. To search the document audit log, click the search icon to bring up the search panel on the left-hand side.

Audit Log											×
Search		Search	Export	Export All	Excel	~ Q	Log type	Log Date	Owner	IP address	Ori
Fieldn	name		Criteria				Document - Publish	2024-09-01 01:34:39	Jennifer Tam	172.31.5.29	Ver
Log ty	ype	equal				and	Preview - Update	2024-09-01 01:33:41	Document Service Account	::1	
Log Da	Date	greater or eq	ual			and	Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	::1	
Log Da	Date	less or equal				and	Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	::1	
Owner	er	contain			and	Document - Access Content	2024-09-01 01:33:37	Indexing Service Account	EC2AMAZ-JM	10,	
IP add	dress				and	Document - Access Content	2024-09-01 01:33:35	Document Service Account	::1		
Origina	nal Value	contain				and	Document - Check In	2024-09-01 01:33:35	Jennifer Tam	172.31.5.29	Ver
New V	Value	contain				and	Document - Check Out	2024-09-01 01:33:34	Jennifer Tam	172.31.5.29	Ver
Add							Document - Publish	2024-09-01 01:32:43	Jennifer Tam	172.31.5.29	Ver
							Preview - Update	2024-09-01 01:29:51	Document Service Account	::1	
							Thumbnail - Update	2024-09-01 01:29:50	Document Service Account	::1	
							Thumbnail - Update	2024-09-01 01:29:49	Document Service Account	::1	
							Document - Access Content	2024-09-01 01:29:45	Indexing Service Account	EC2AMAZ-JM	10,

5. Search the audit log by defining different search criteria, for example, Log Type = "Preview – Update", then click the "Search" button.

rch	Search Export Export All Ex	cel 🗸 Q	Log type	Log Date	Owner	IP address	0
Fieldname	Criteria		Preview - Update	2024-09-01 01:33:41	Document Service Account	::1	
Log type	equal Preview - Update	and	Preview - Update	2024-09-01 01:29:51	Document Service Account	:1	
Log Date	greater or equal	and	Preview - Update	2024-09-01 01:28:40	Document Service Account	::1	
Log Date	less or equal	and					
Owner	contain	and					
IP address	contain	and					
Original Value	contain	and					
New Value	contain	and					
.dd							

6. You can export the search result in either Excel spreadsheet or PDF file.

Antelope International Limited

Flat G, 16/F, Seabright Plaza, 9-23 Shell Street North Point, Hong Kong



Visit us on at https://www.antelopeglobal.com