Antelope 6 Workspace
User Manual

Created By
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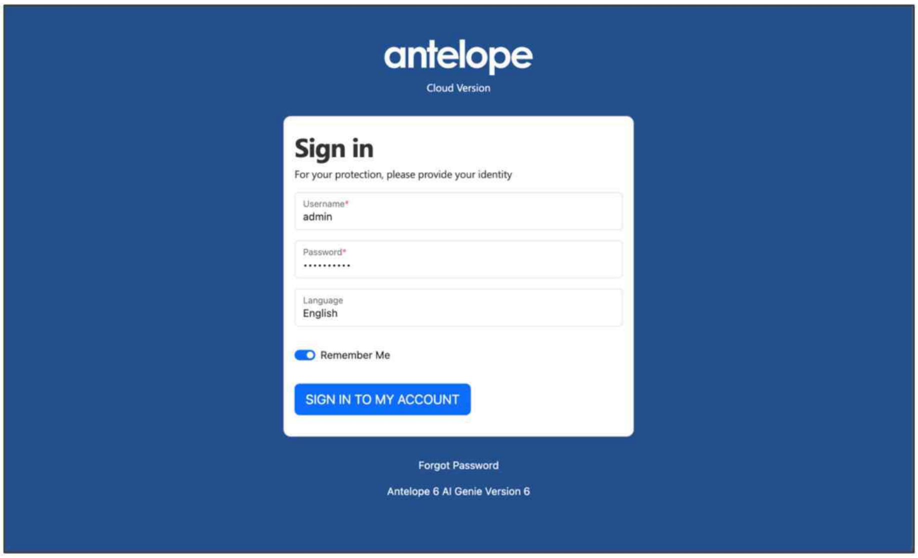
Table of Contents

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.



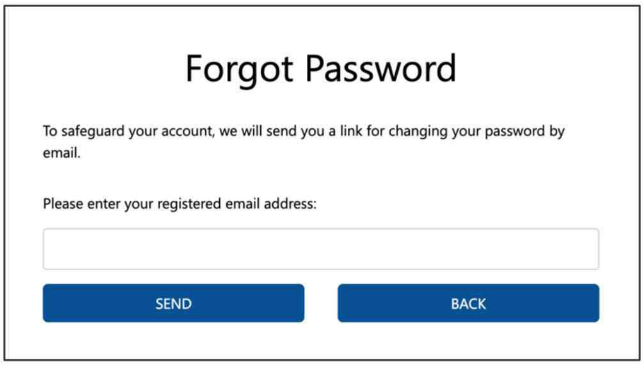
3. Select the language. Currently Antelope supports English, Traditional Chinese, Simplified Chinese and Portuguese.

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.



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.

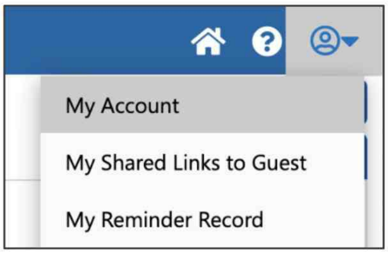
6. Click the "Change" button.

7. You can now login again with your new password.

B. My Account

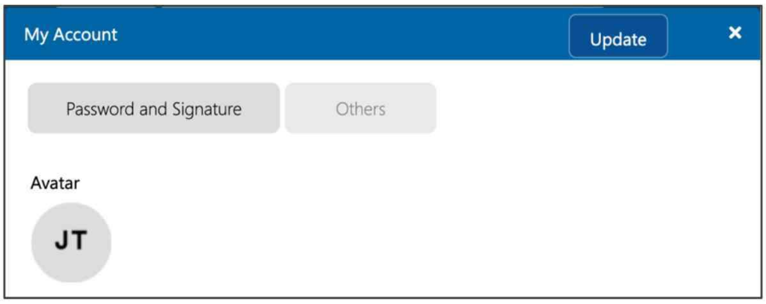
I. Avatar

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.



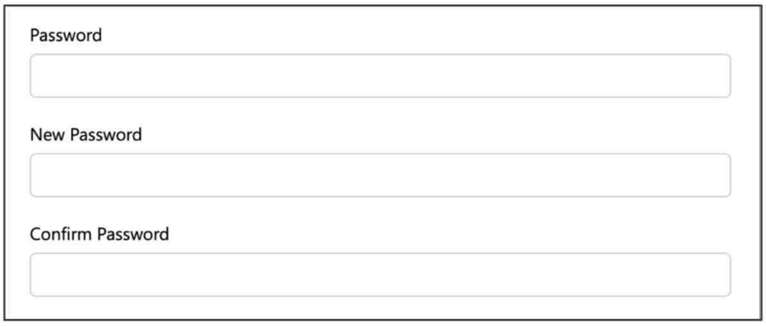
4. From the Upload Document pop-up window, click the "Choose File" button.

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

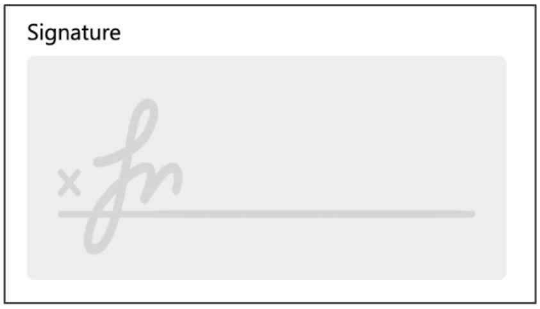
1. To update password, Input your current one from “Password”.



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.
Type	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.

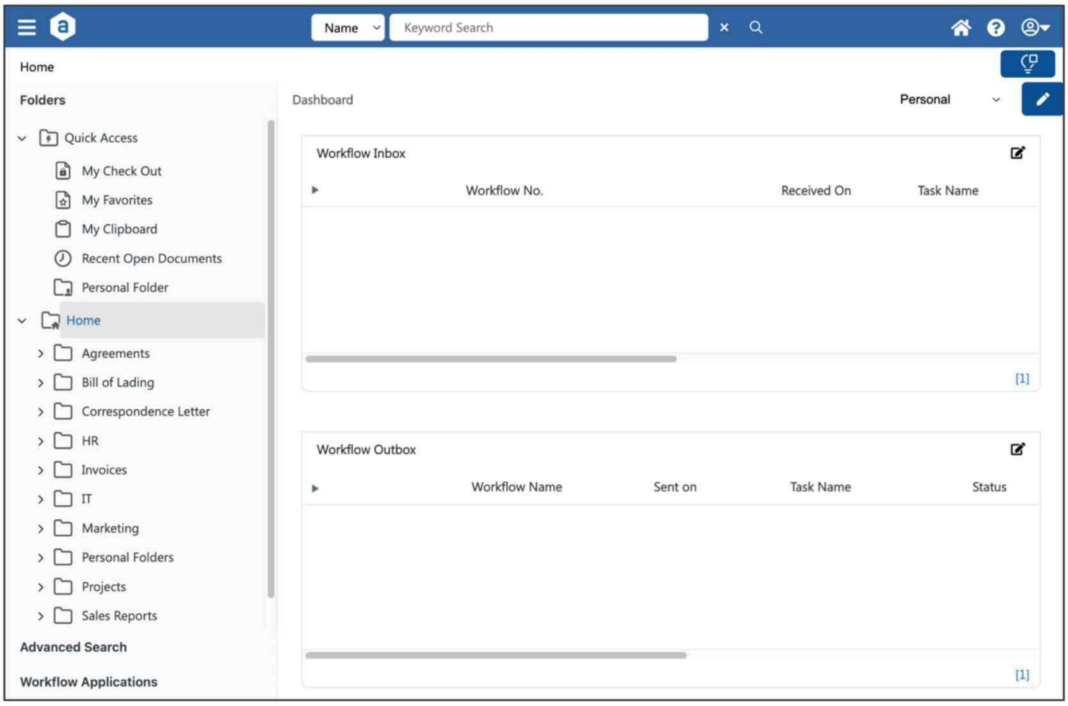
5. Click the “Upload” button to save your signature.

C. Dashboard

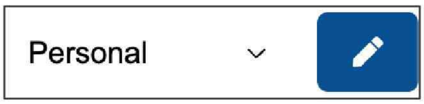
I. Dashboard mode and web part introduction

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.

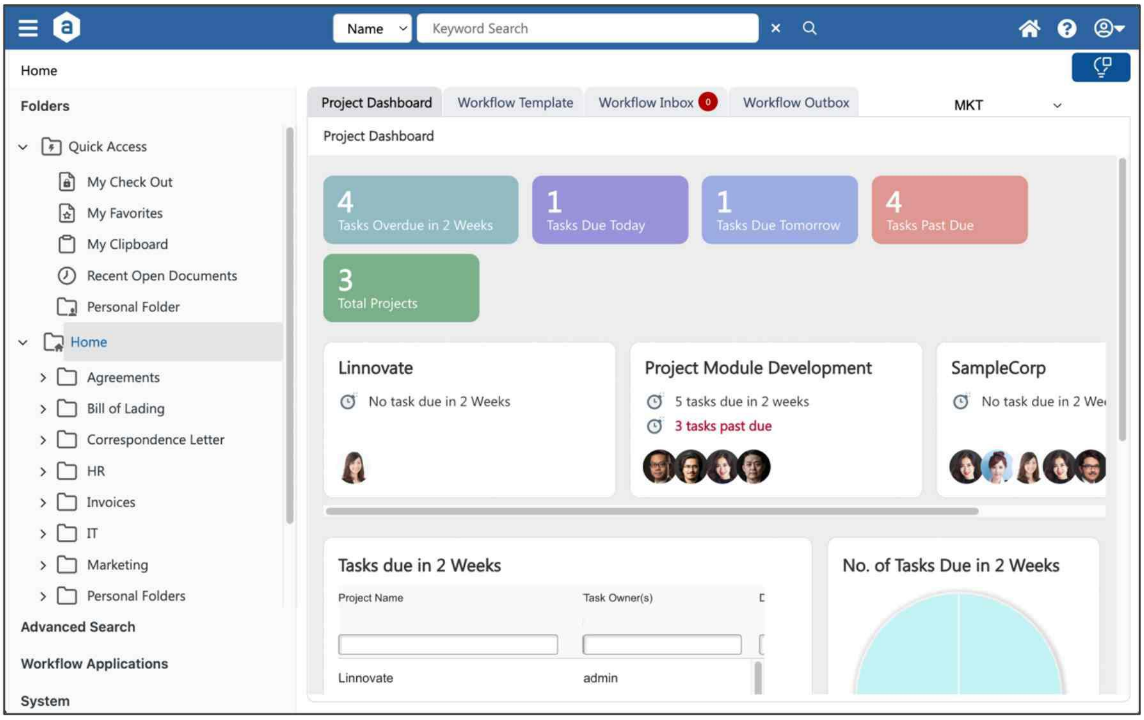


2. At the top right-handed corner, there is a “Personal” pull-down list which allows you to select different dashboards.



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.



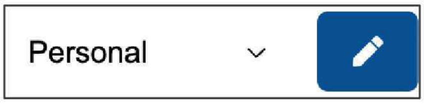
5. Depends on your access permission, if you do not have rights to modify your user group dashboard, you won't able to see the blue edit button on the right-handed side, as below:-

No access permission

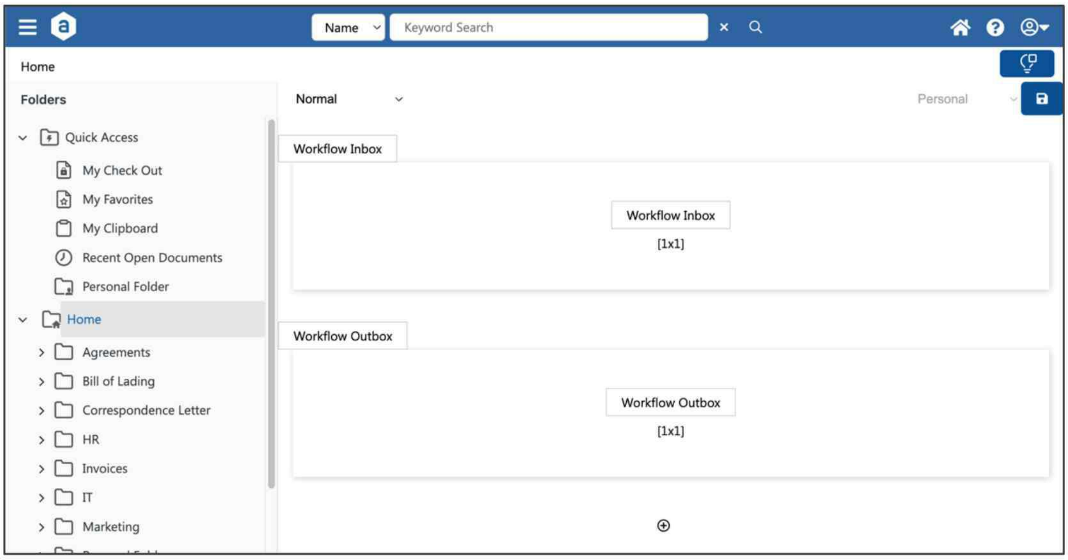
Access permission granted

II. Edit the dashboard

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

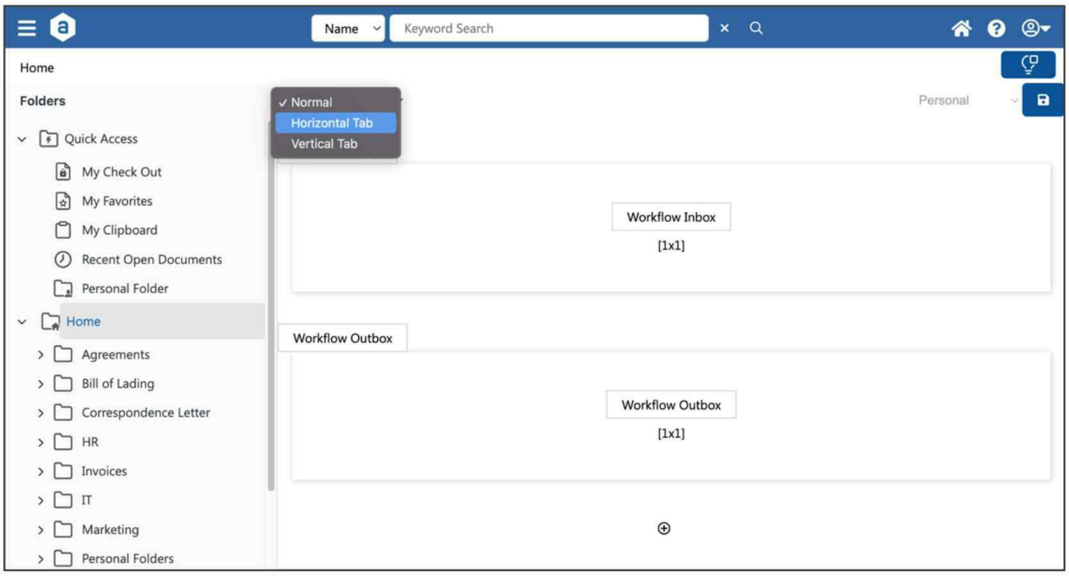


2. Your dashboard will change into edit mode.



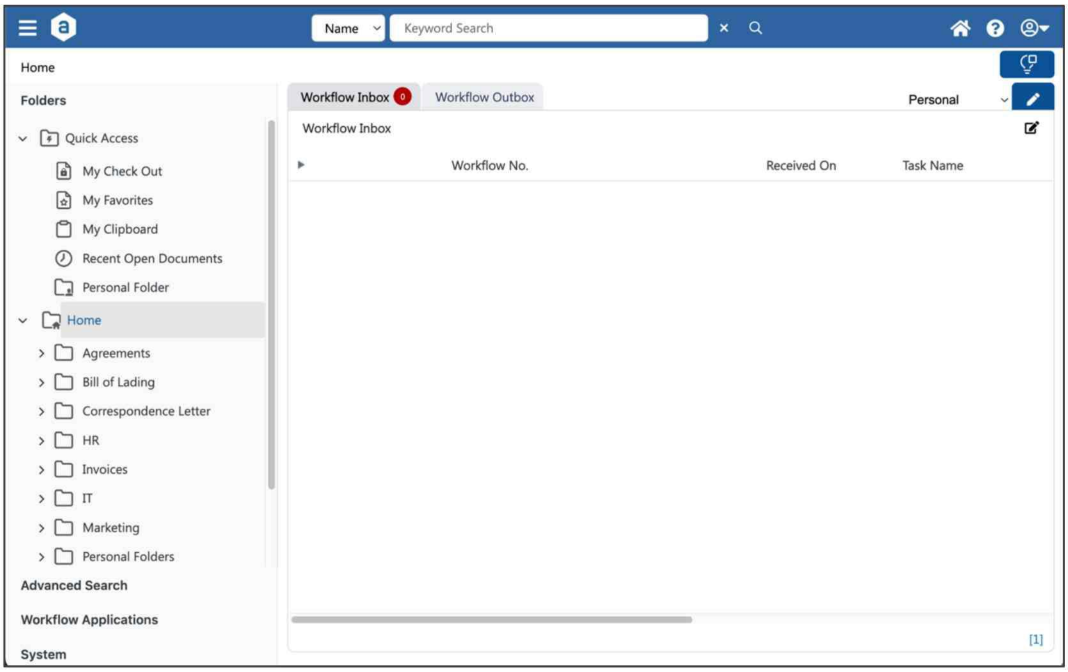
3. The blue pencil button will change into save button.

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.

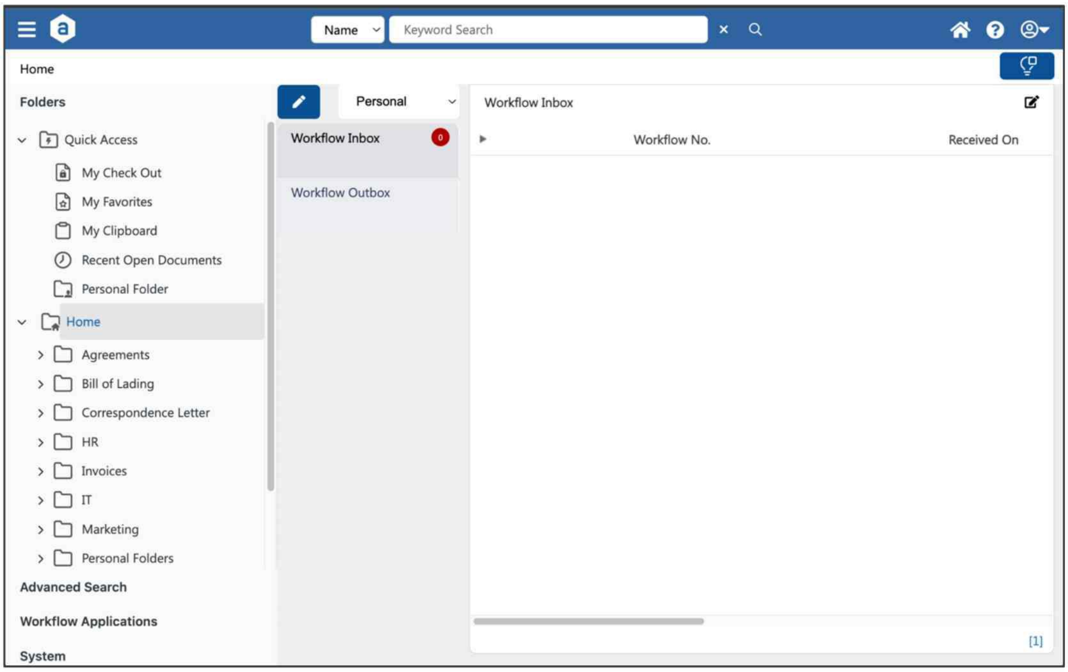


5. Click the blue save button to commit changes.

6. The dashboard will change into horizontal tab mode.

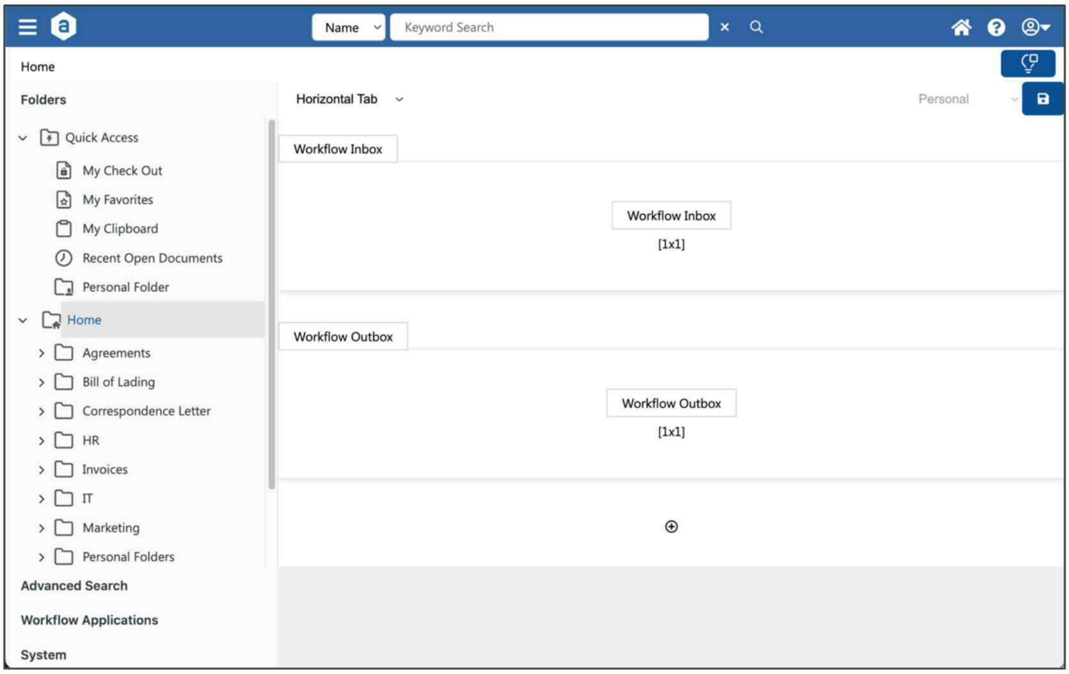


7. For vertical tab mode, all web part tabs will align to the left-handed side of the screen.

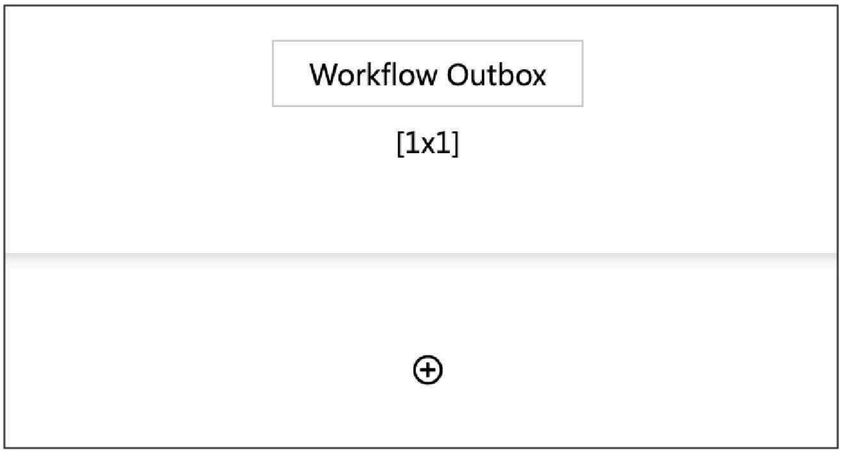


III. Add a new web part

1. Change the dashboard into edit-mode.

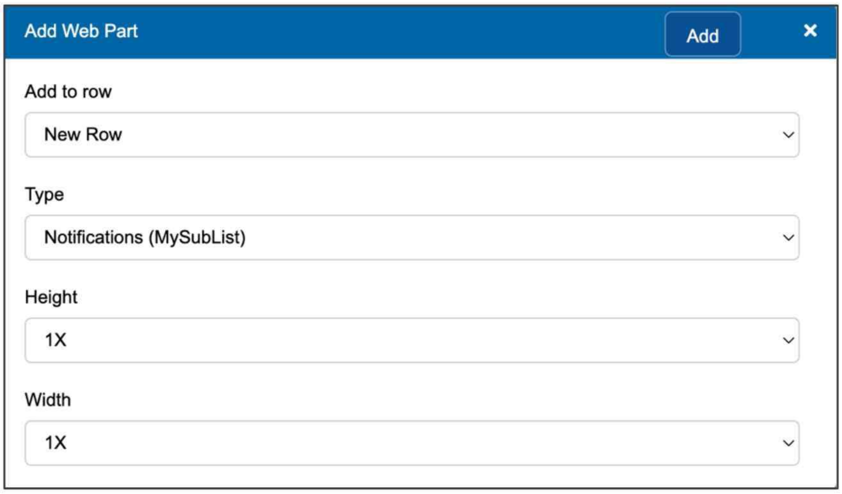


2. Click the rounded add button from the bottom.



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

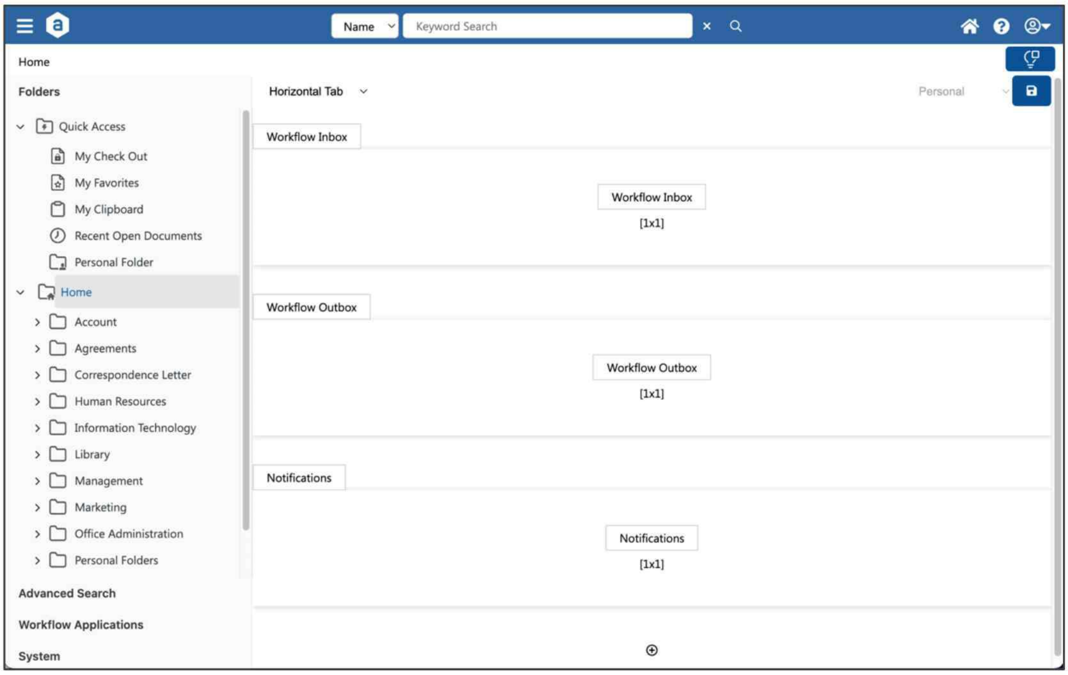
4. Use the following setting:



5. Click “Add” button to commit changes.

6. The “Add Web Part” window will be closed.

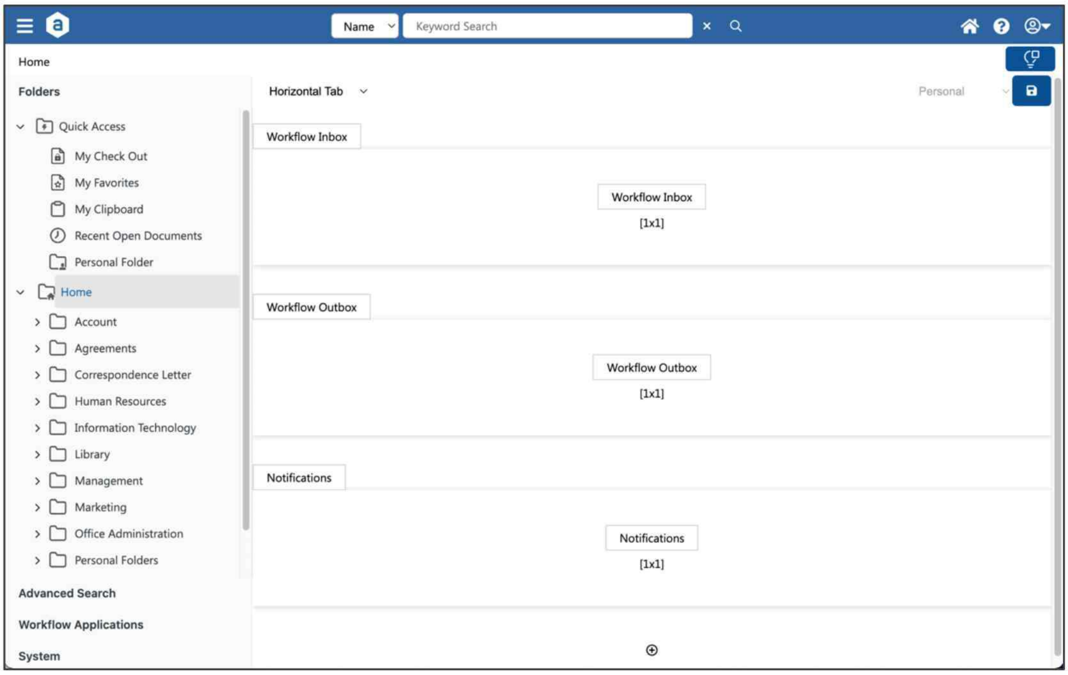
7. The dashboard is still in edit-mode, click the blue save button from the top right-handed corner to commit changes.



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

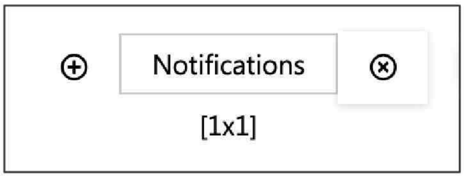
IV. Delete an existing web part

1. Change the dashboard into edit-mode.

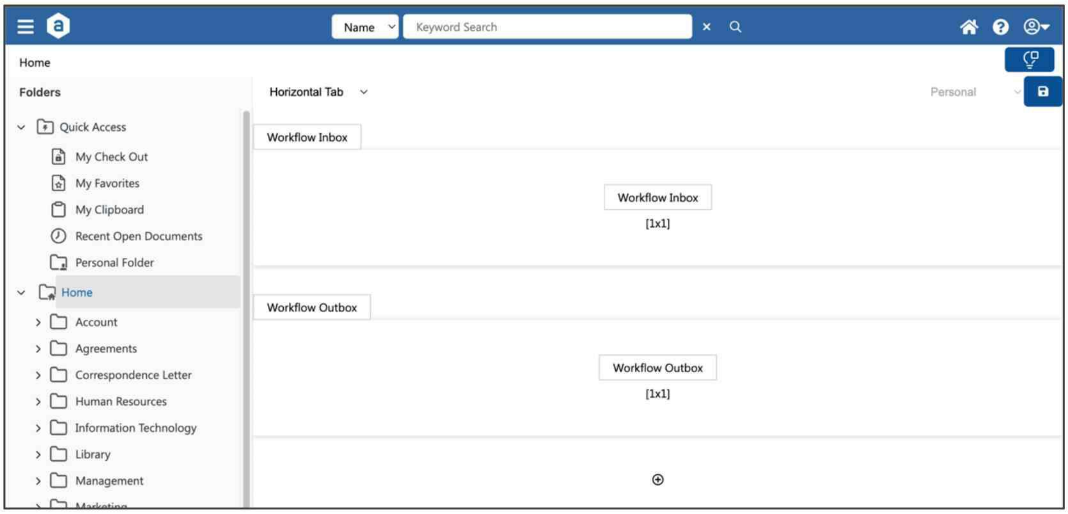


2. Move the mouse cursor to Notifications webpart.

3. Click the rounded cross icon.

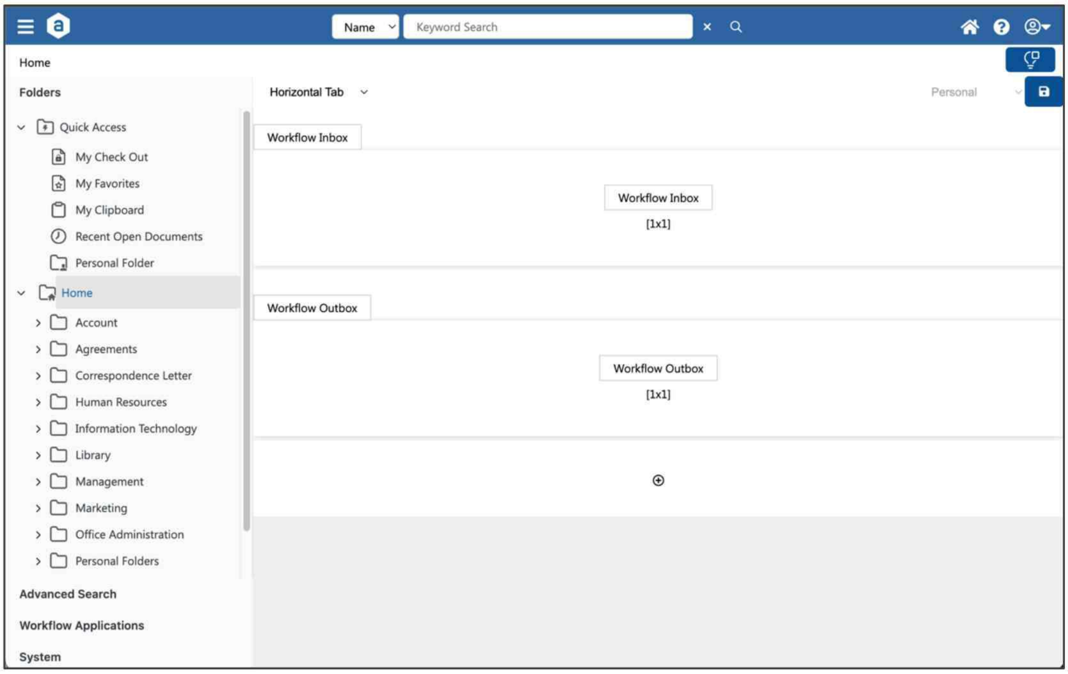


4. The web part is deleted.



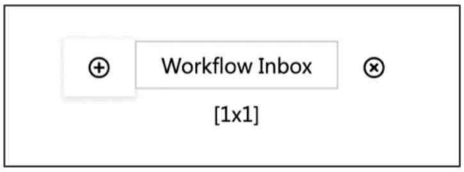
V. Add a new web part to existing row

1. Change the dashboard into edit-mode.

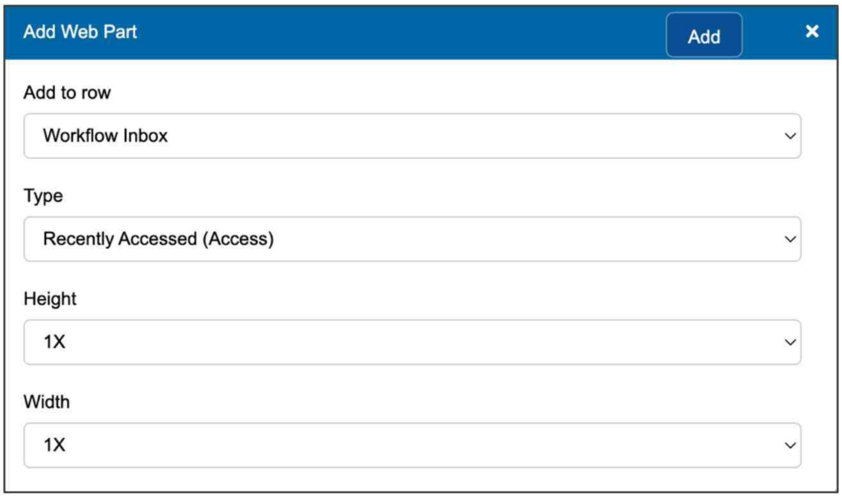


2. Move the mouse cursor to Workflow Inbox webpart.

3. Click the rounded add icon.

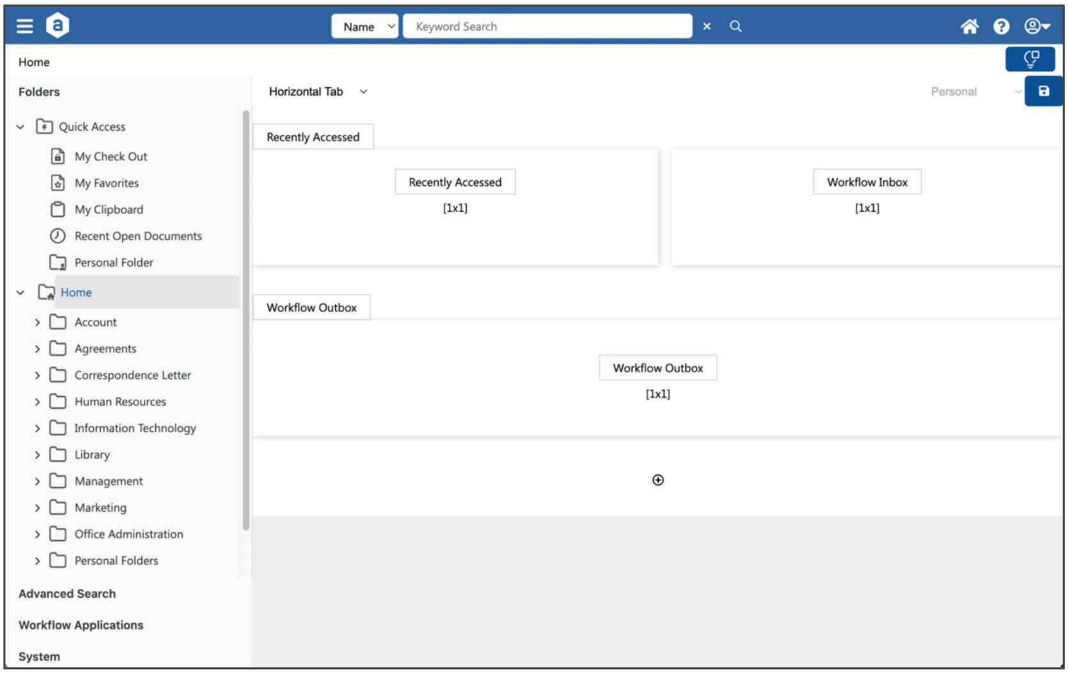


4. The “Add Web Part” window will appear, use the following setting:

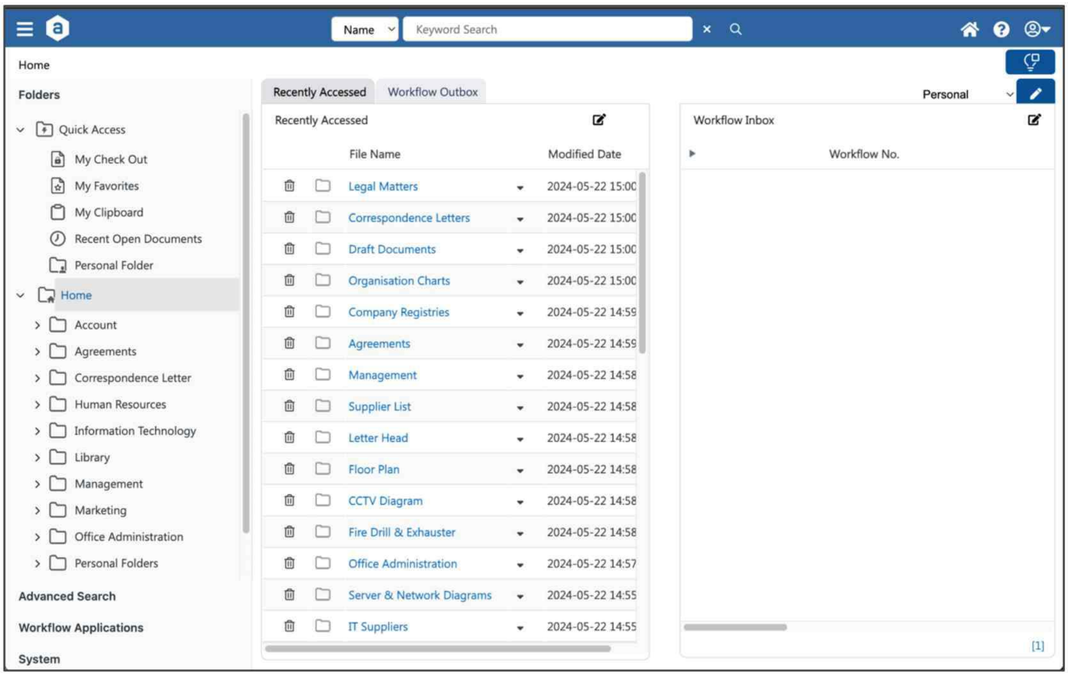


5. Click the “Add” button to commit changes.

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

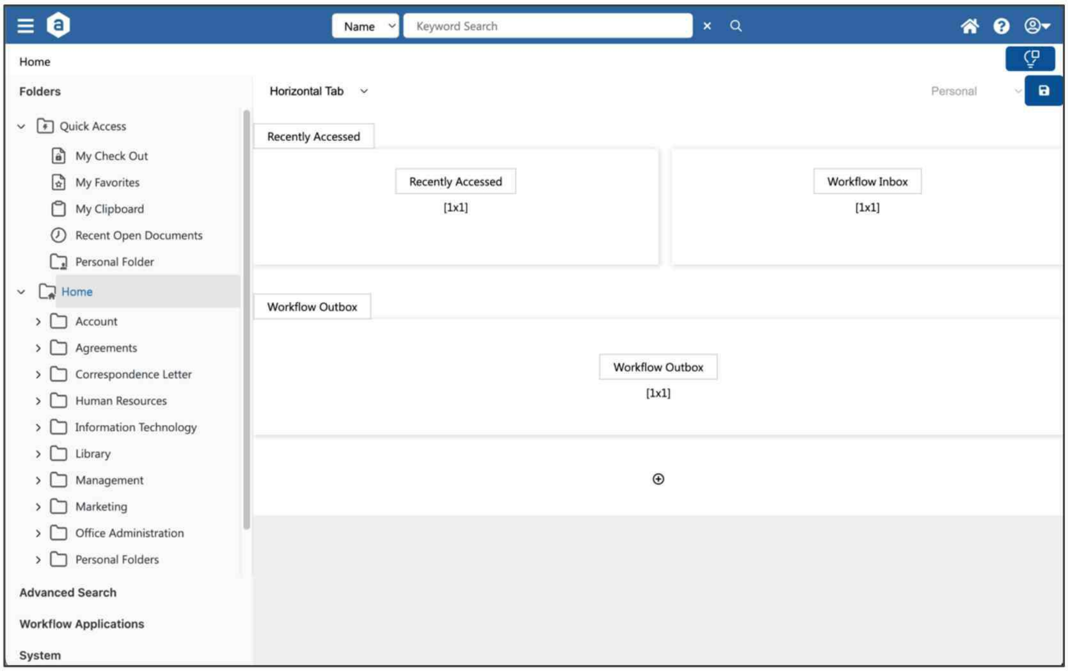


7. Click the blue save button from the top right-handed corner to commit changes.

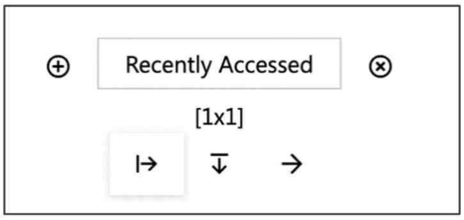


VI. Enlarge an existing web part

1. Change the dashboard into edit-mode.

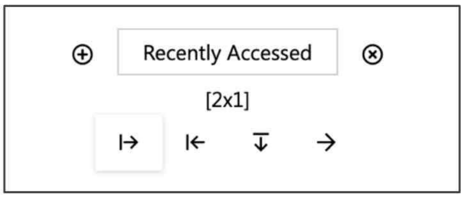


2. To enlarge the width of an existing web part, click the first arrow icon.

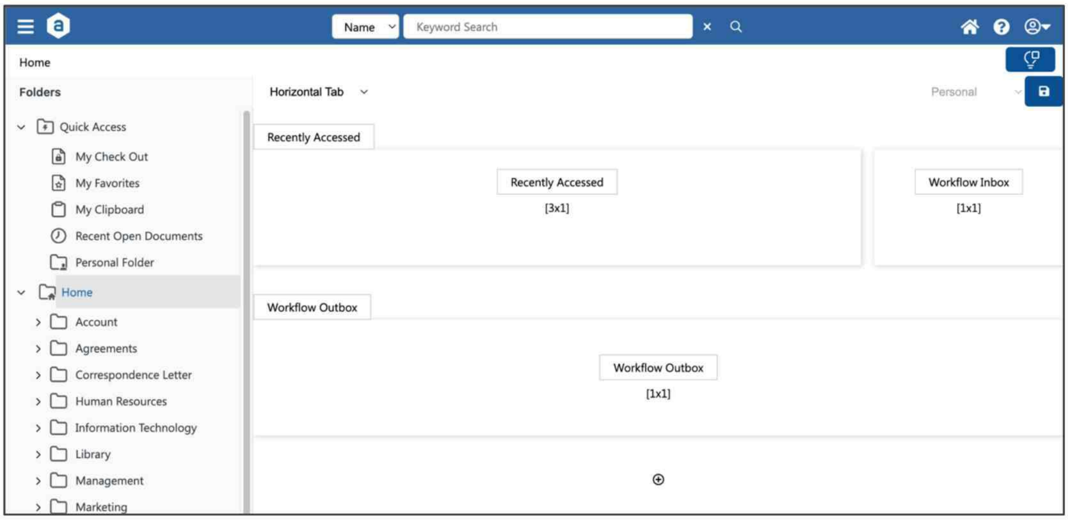


3. The web part width is enlarged with a ratio of [2 x 1].

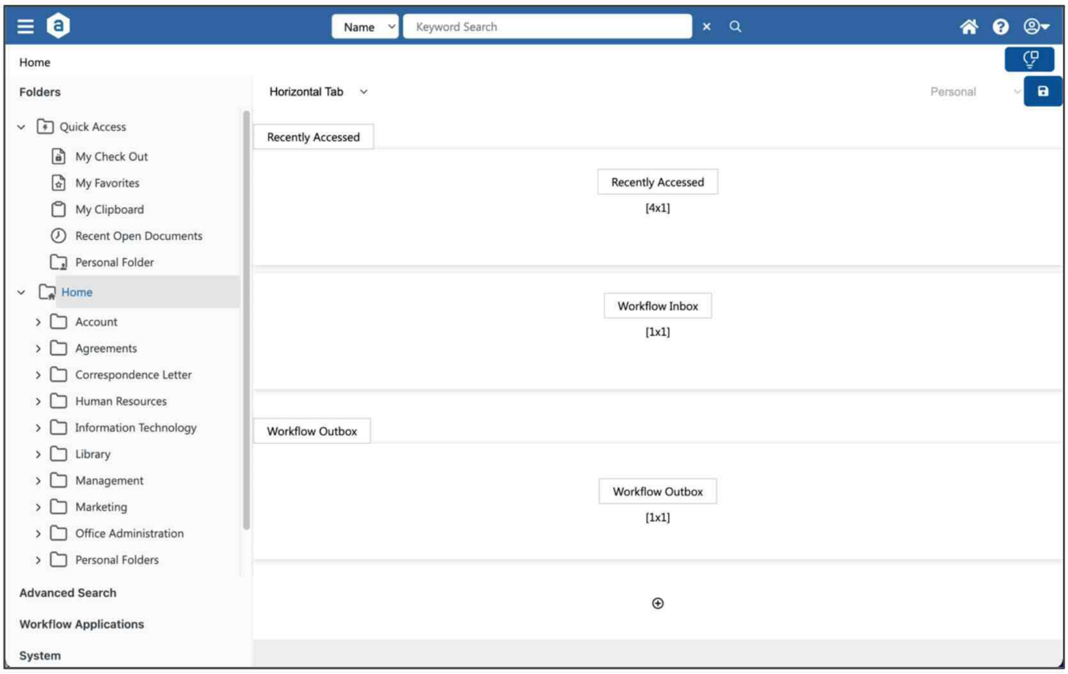
4. Click the first arrow icon again to enlarge further with a ratio of [3 x 1].



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.

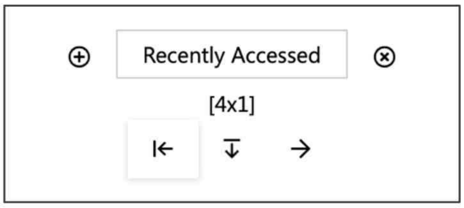


Recently Accessed at [3 x 1] ratio

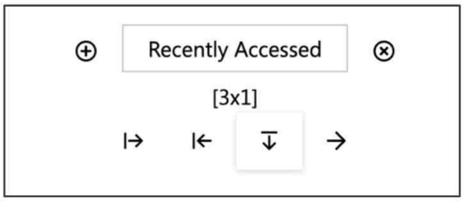


Recently Accessed at [4 x 1] ratio

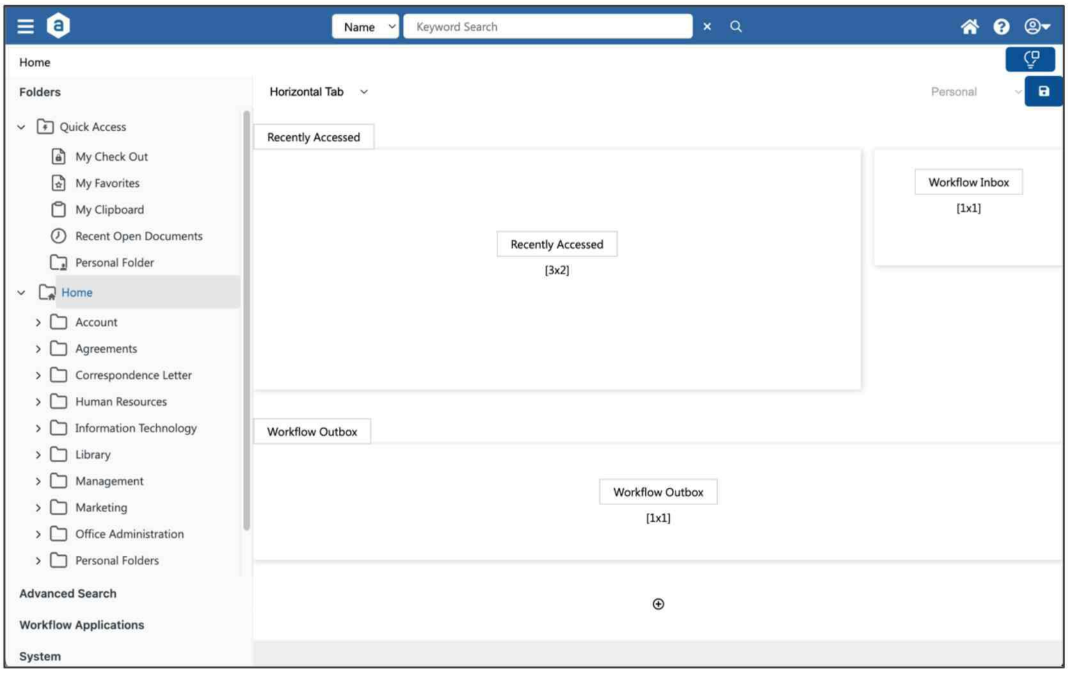
6. To shrink the ratio, click the left arrow icon.



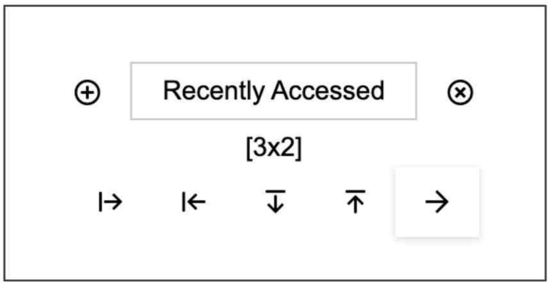
7. Similarly, to enlarge the height of the web part, click the down arrow.



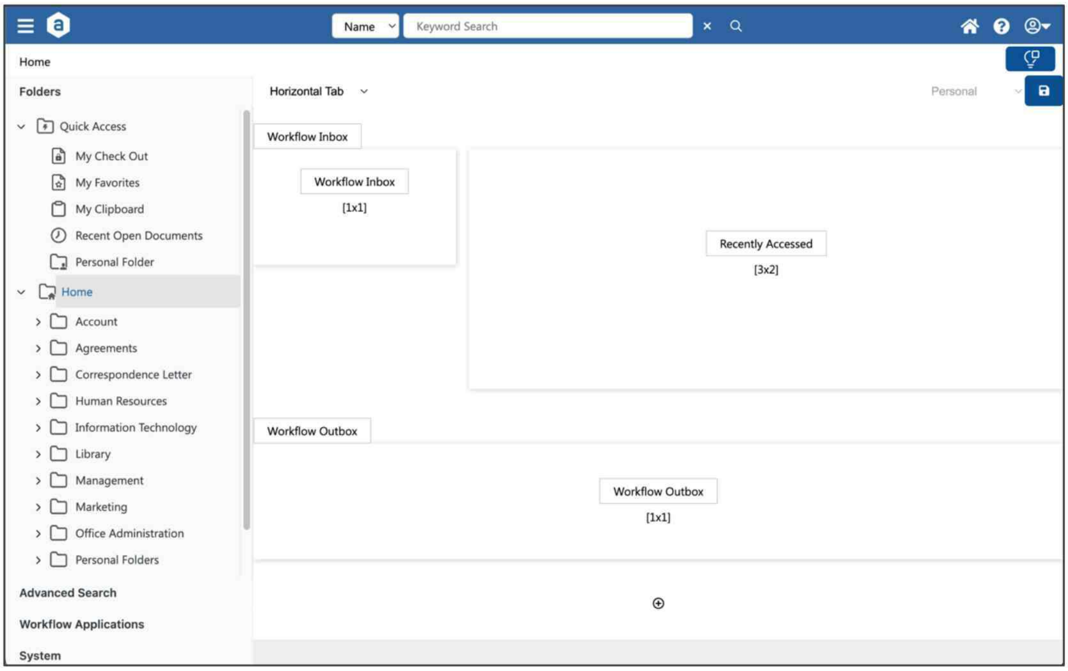
8. The web part height is enlarged.



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

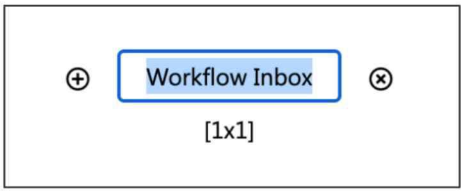


10. This will interchange the position between two web parts.

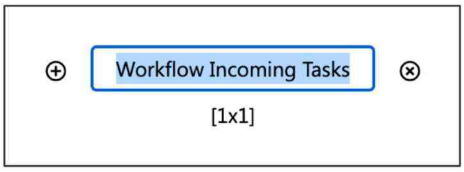


VII. Rename a web part

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



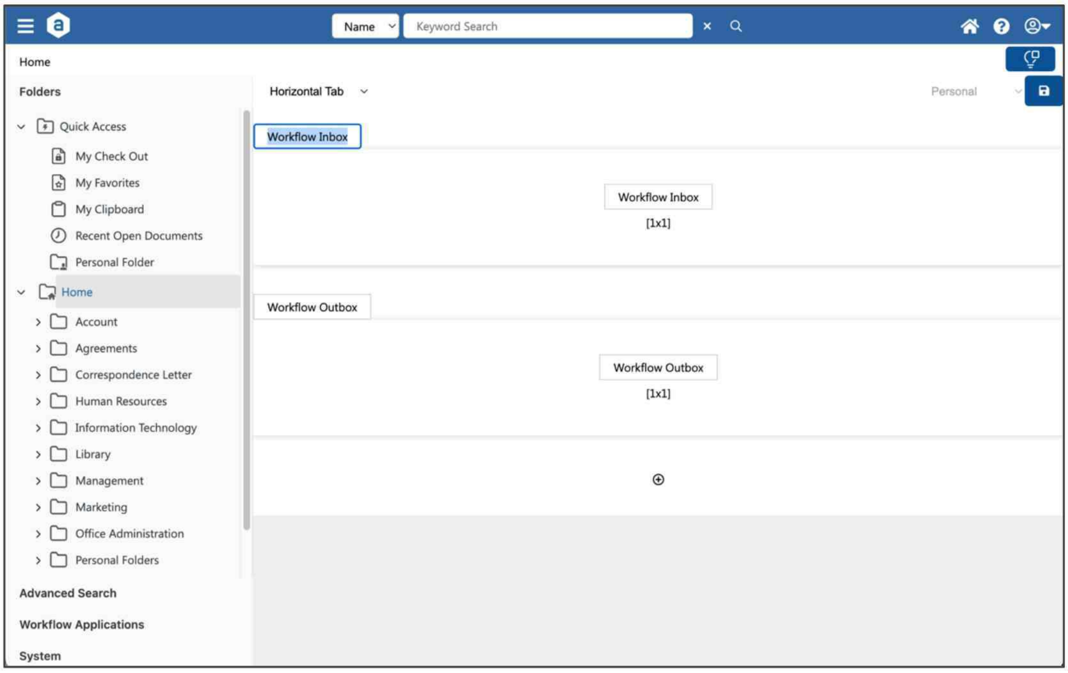
2. Input the new name of the web part.



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

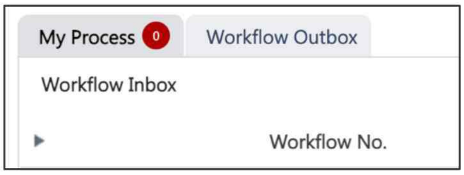
VIII. Rename a tab

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



2. Input the new name of the tab.

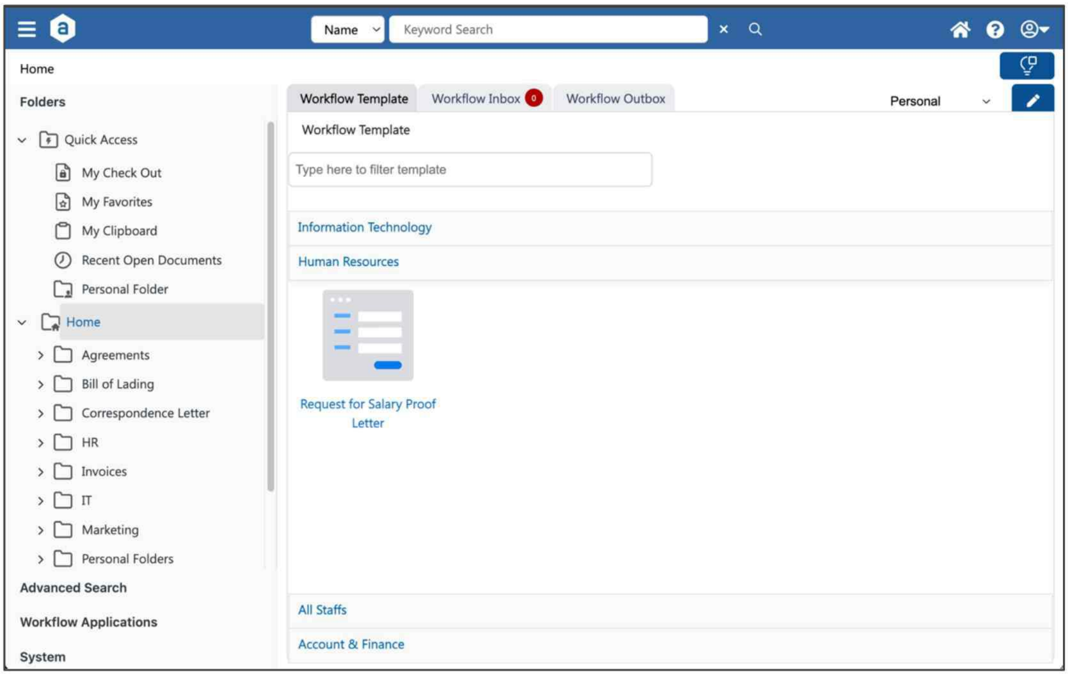
3. Click the blue save button from the top right-handed corner to commit changes.



D. Searching

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).

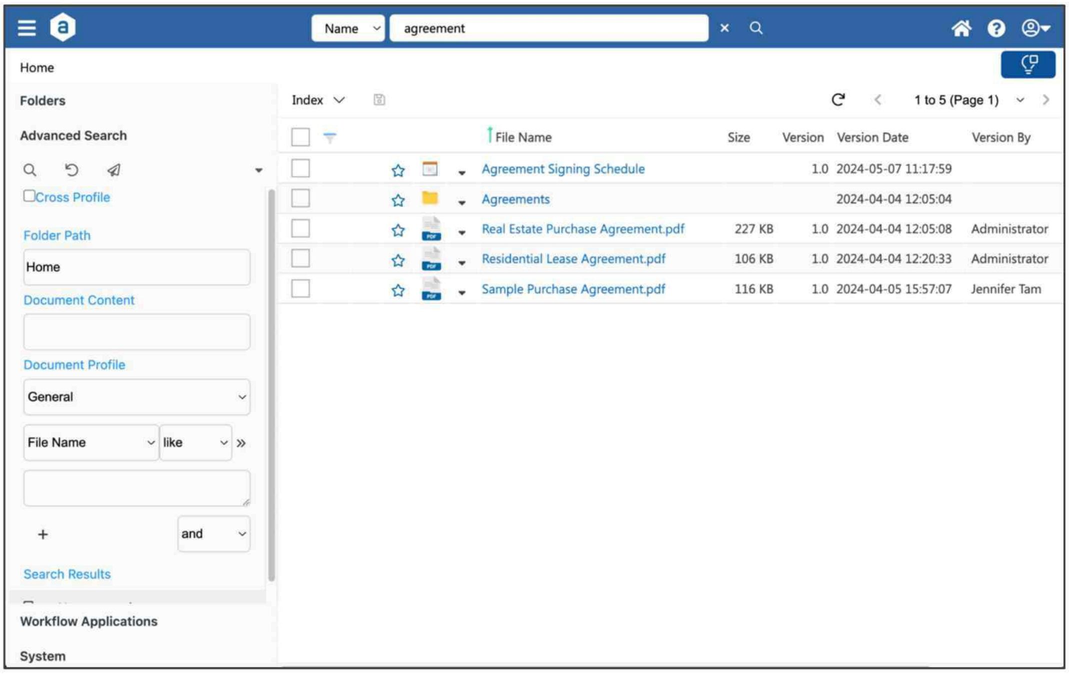


2. From the top blue bar, select "Name" as search type.

3. Input the search keyword (e.g. agreement).

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

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

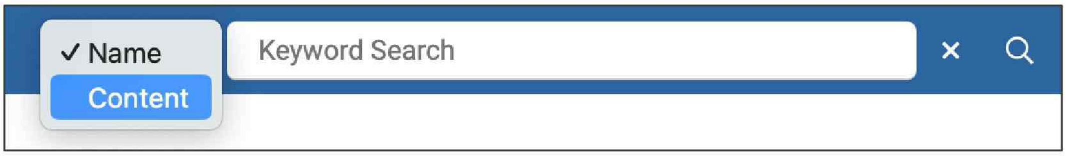


Note: Name Search does not support folders under "Quick Access".

II. Full-Text Search

1. 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).

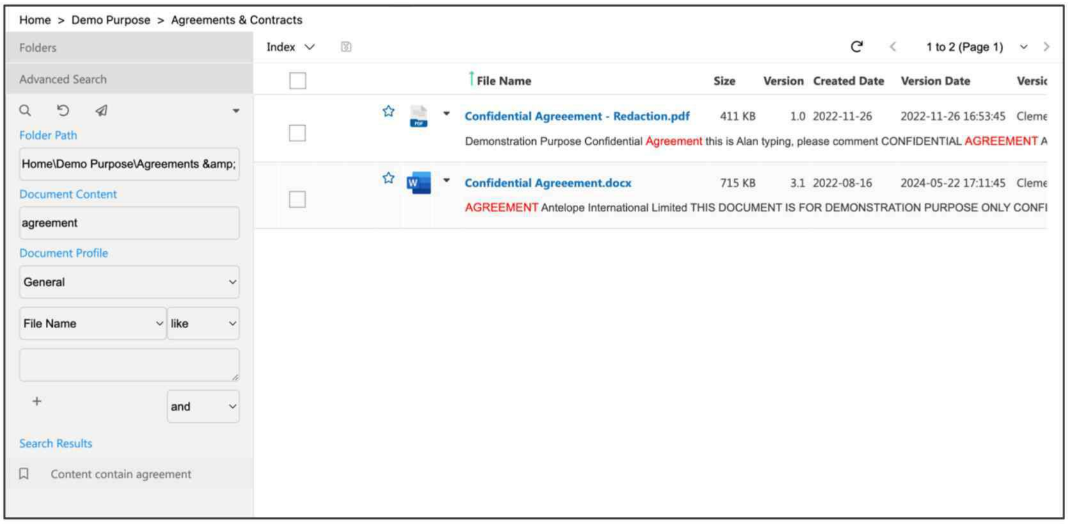
2. From the top blue bar, select "Content" as search type.



3. Input the search keyword (e.g. agreement).

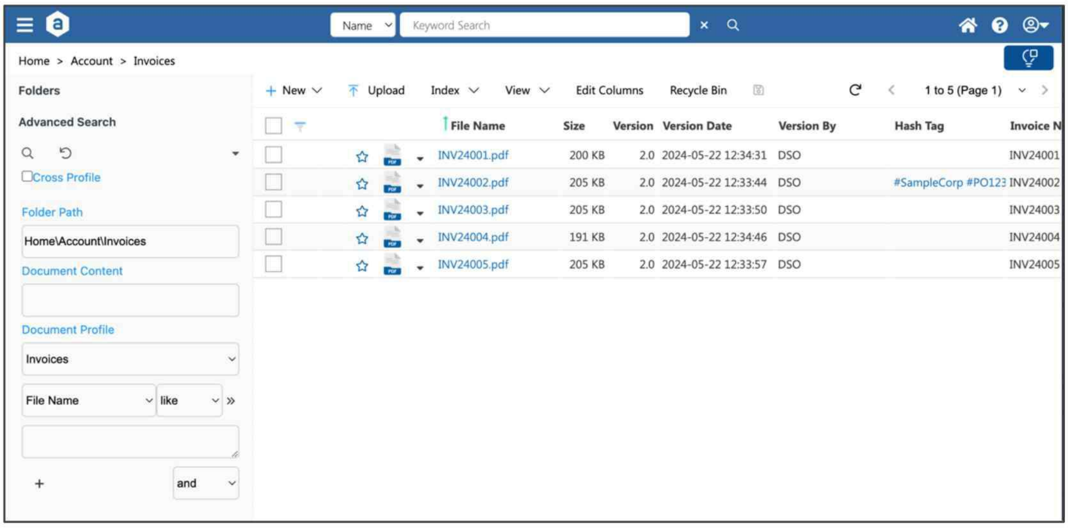
4. Press "Enter" or click the search icon.

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

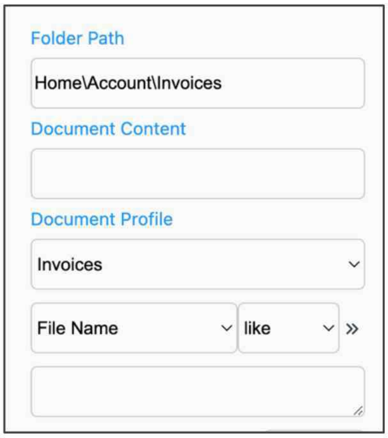


III. Advanced Search

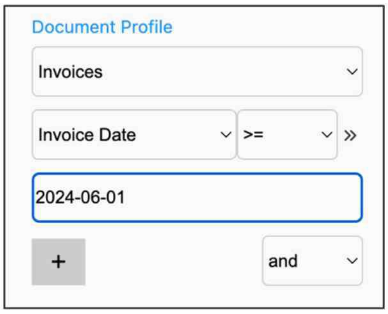
1. Advanced search, or index search, is for searching documents according to their document profiles and index fields. Click the “Advanced Search” tab on the left-hand side column.



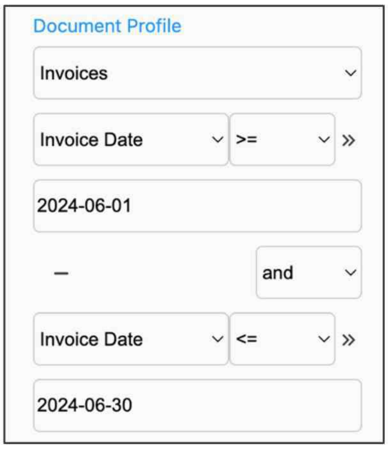
2. The “Folder Path” and “Document Profile” is already selected for you.



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

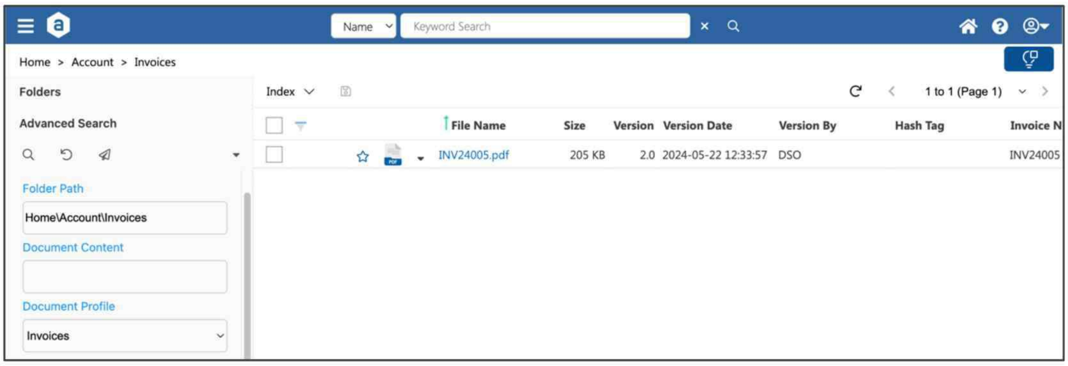


4. Click the add button [+] to add another search field, select “Invoice Date <= 2024-06-30”.



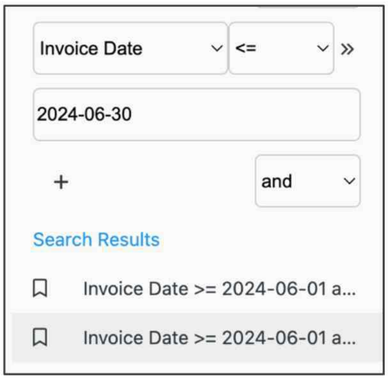
5. Finally click the search icon to perform the advanced search.

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



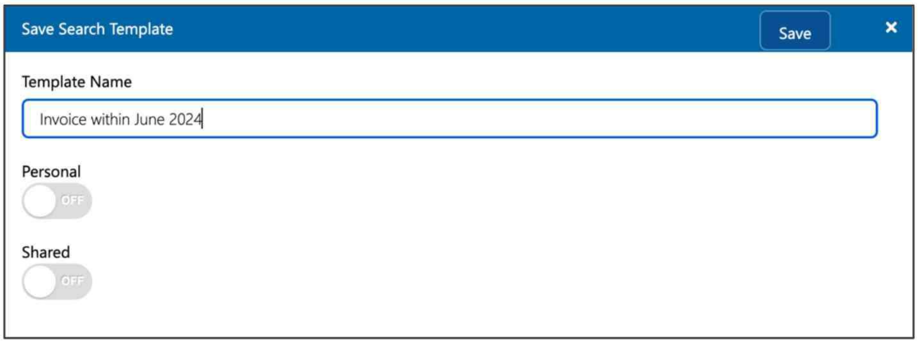
IV. Save Search Template

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



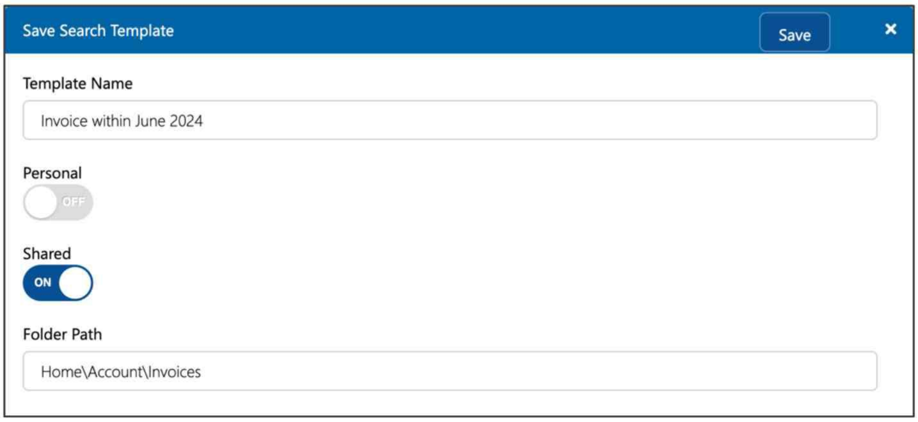
2. To save your search setting for future use, click the flag icon. 

3. The “Save Search Template” window will appear. Input a “Template Name” for your search template.



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.



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

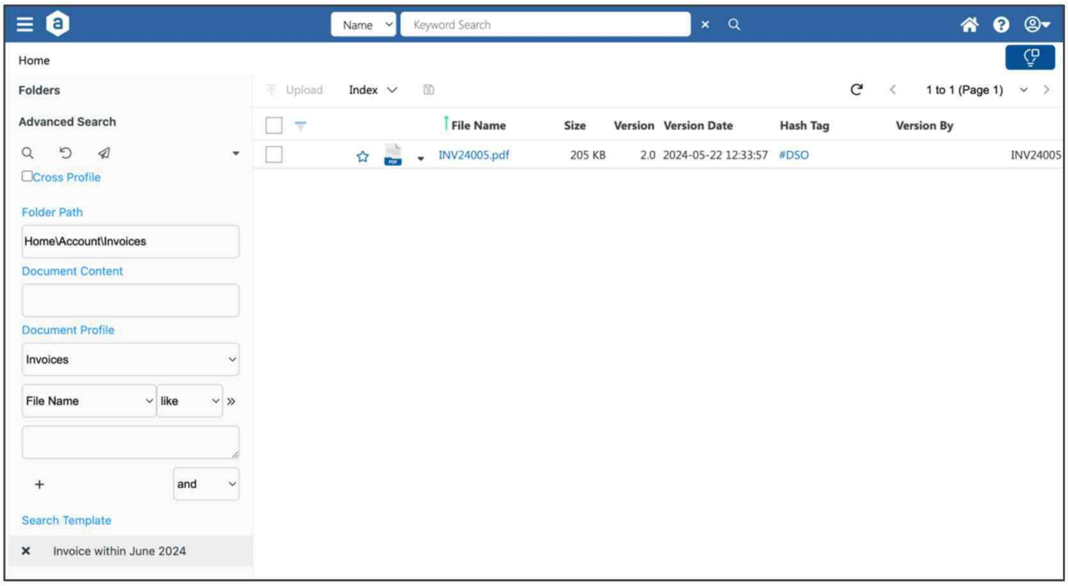
V. Load Search Template

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.

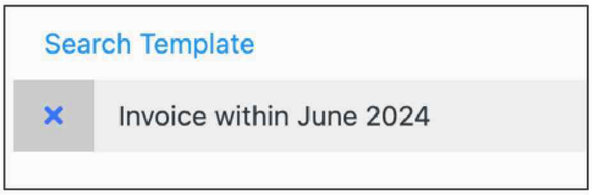
2. Click the template "Invoice within June 2024" to load your search template.

3. Antelope will perform the search result for you.

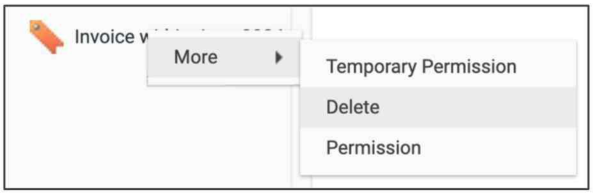


VI. Delete Search Template

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.



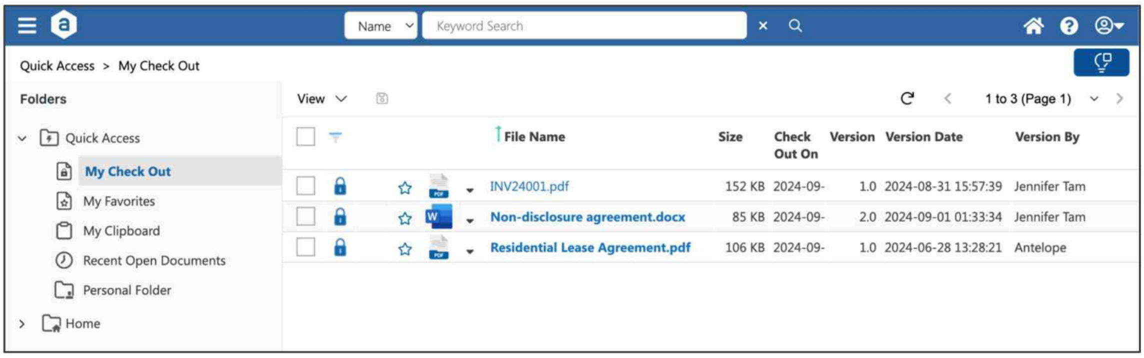
2. A confirmation message “Are you sure to delete?” will appear.

3. Click “Confirm” to delete the search template.

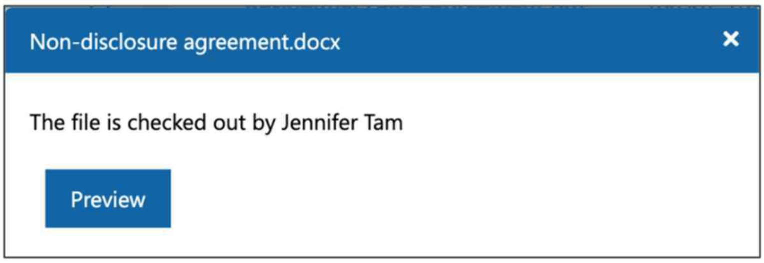
E. Quick Access

I. My Check-Out

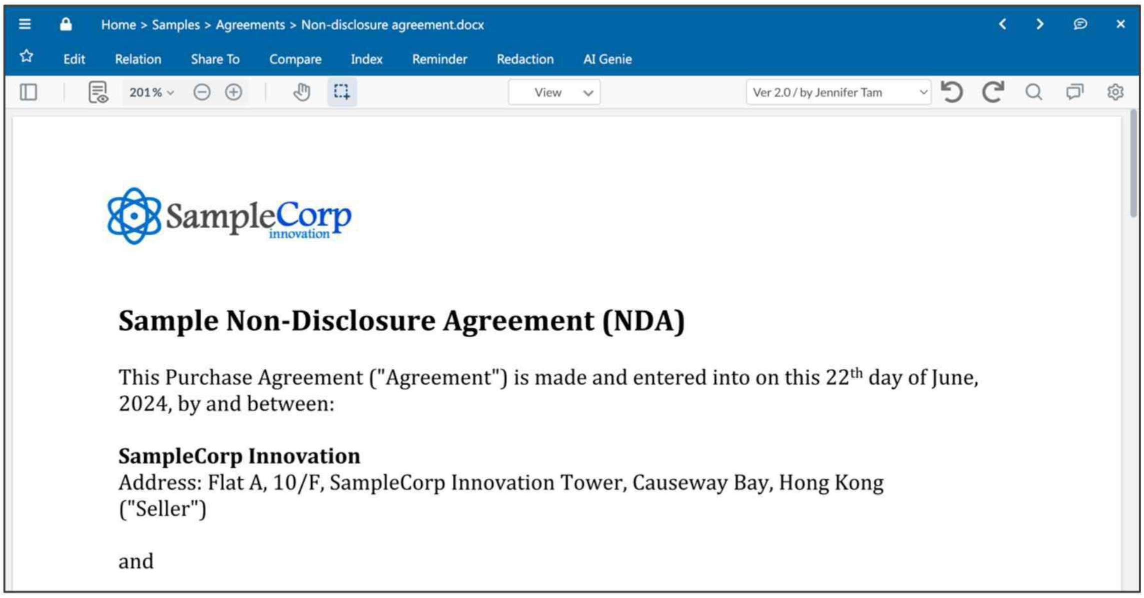
1. Under “Quick Access \ My Check Out”, the folder lists out all your check-out documents.



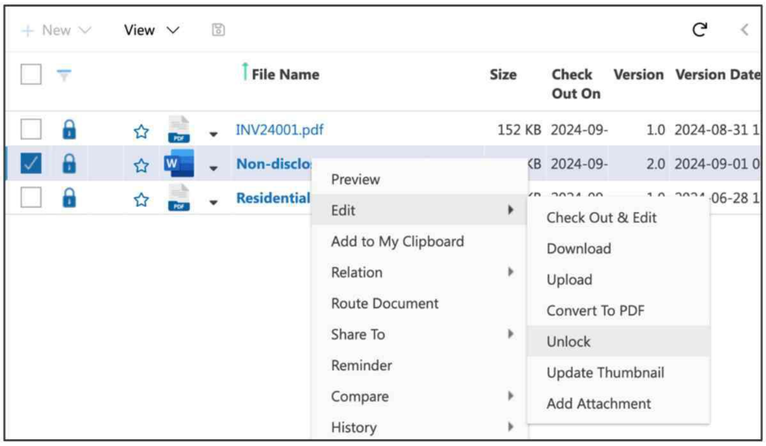
2. Click the document link to open for preview.



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

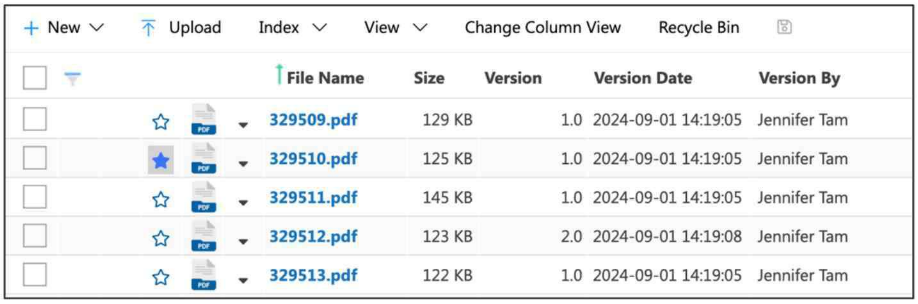


4. To unlock the document, right-click to bring up the context menu, select “Edit > Unlock”.

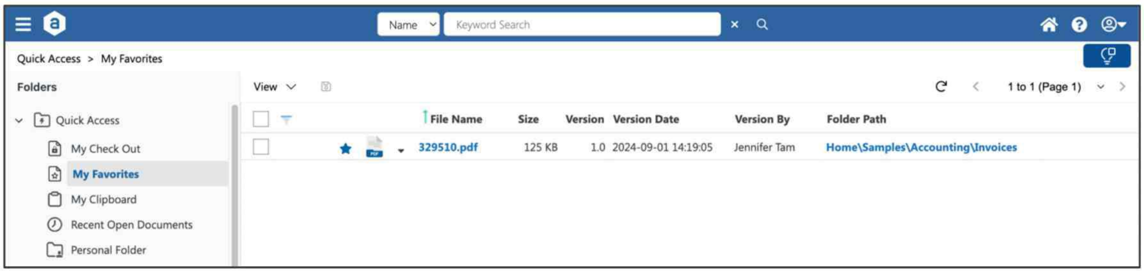


II. My Favorites

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



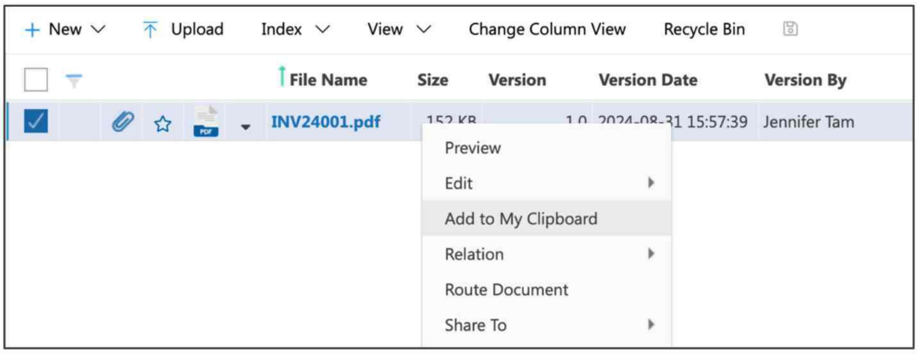
2. To view all marked favorites objects, go to “Quick Access \ My Favorites”.



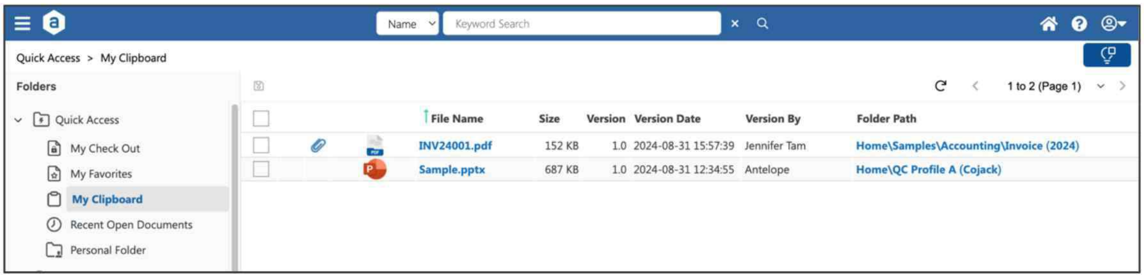
3. Click the “Star” icon again to remove from favorites.

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”.



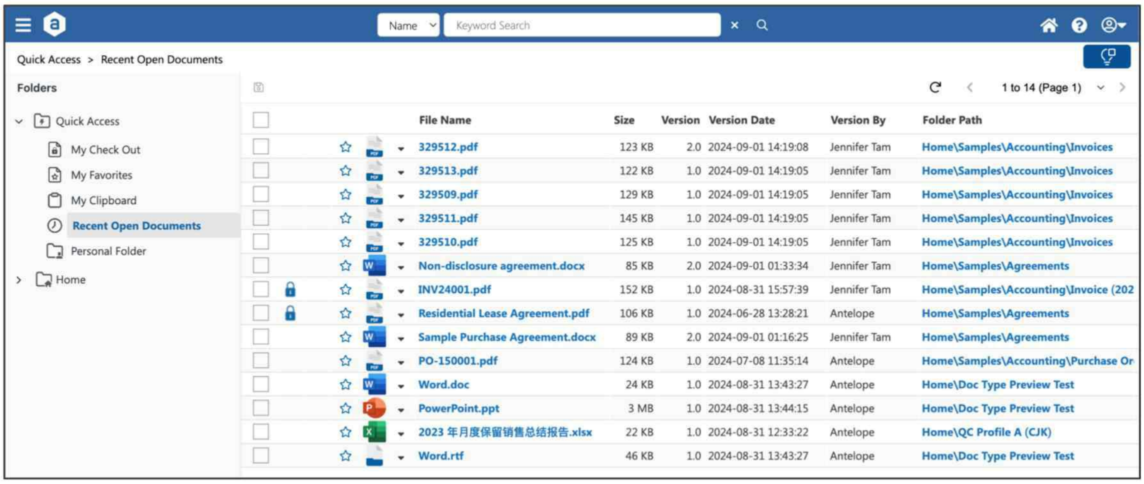
2. You can add multiple documents to clipboard.



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

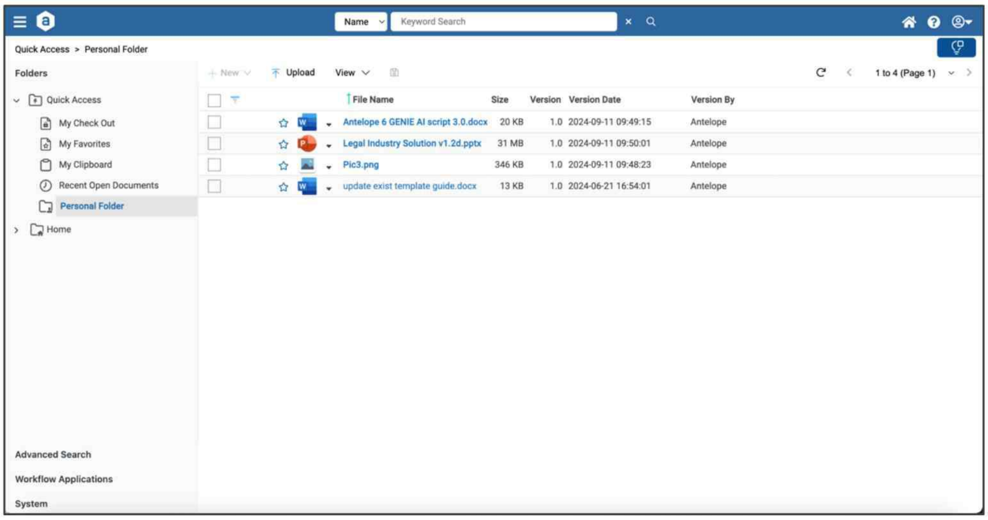
1. Recent Open Documents display all your recently preview documents.



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.

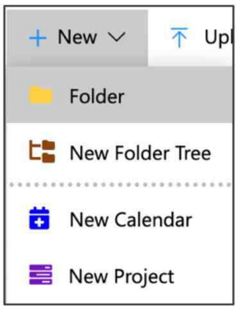


F. Folder

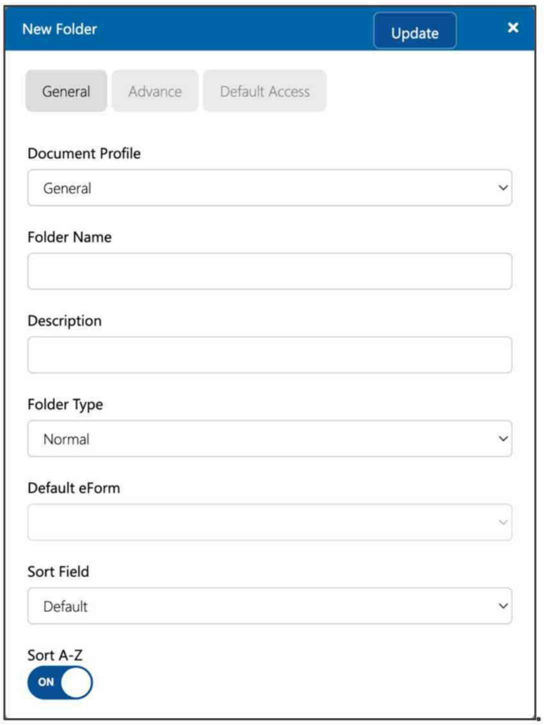
I. Create New Folder

1. To create a new folder, select a location from the folder tree. For example, the Marketing folder.

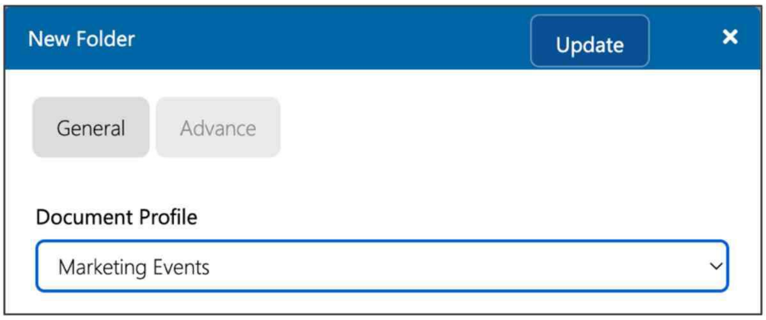
2. From the “New” pull-down menu, select “Folder”.



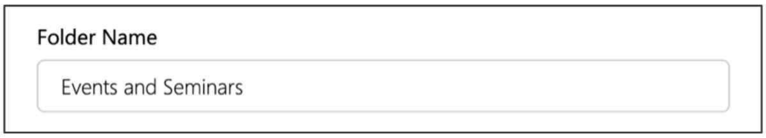
3. The “New Folder” window will appear.



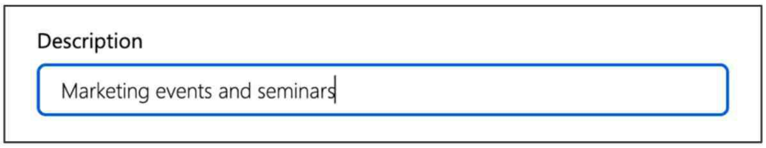
4. Choose the “Document Profile”, which defines what meta-data are stored in your document profile. For example, Marketing Event.



5. Input the folder name “Events and Seminars”.



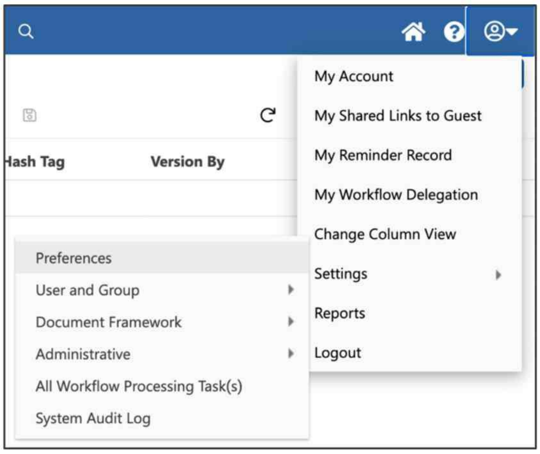
6. Input the description “Marketing events and seminars.” This is an optional field; you may skip that if you do not need any description.



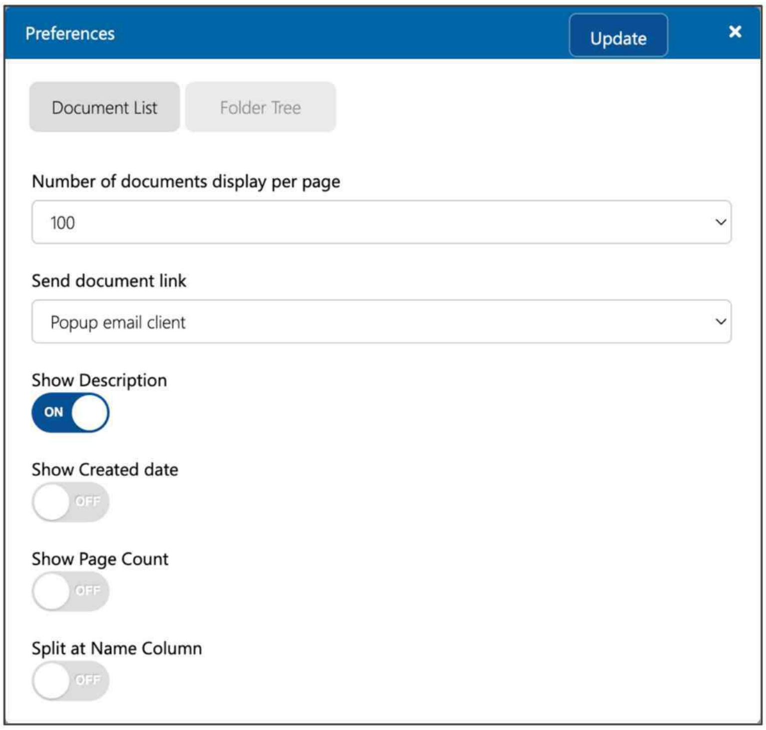
7. Click “Update” button to commit changes.

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

9. 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.



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

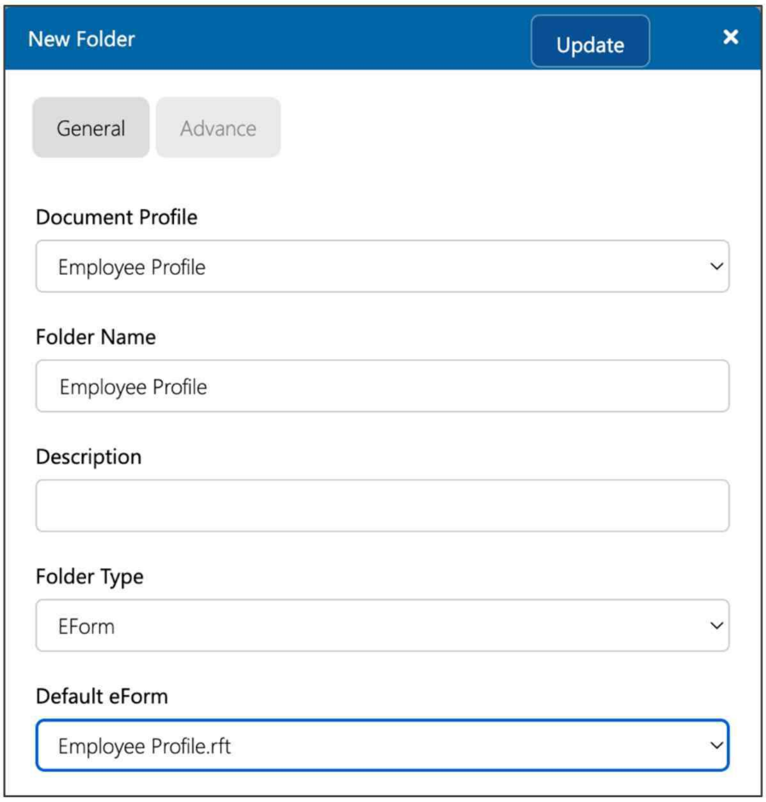


II. Folder Type

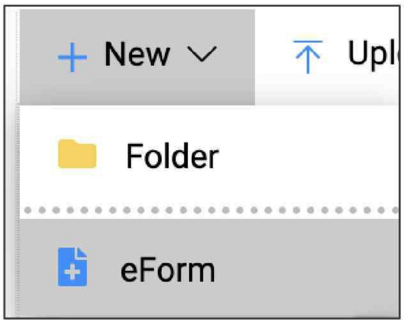
1. There are three types of folders:

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.



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.

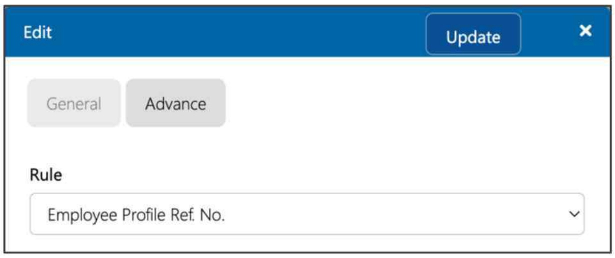


4. Fill-in the eForm and then click "Save" button to commit changes.

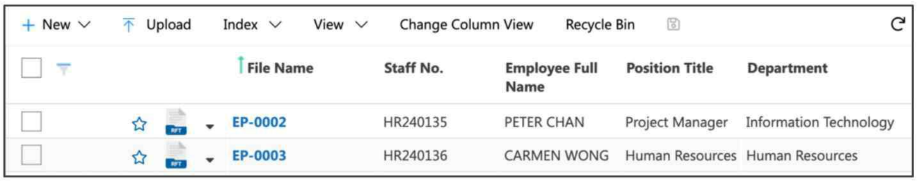
   Note: You can try on the sample folder "Home\Samples\Human Resources\Employee Profile"

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.



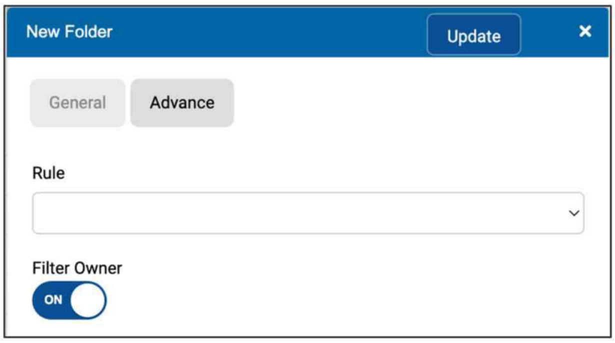
2. When a rule is applied, all document name upload to this folder will auto renamed according to the rule and sequence you have configured.



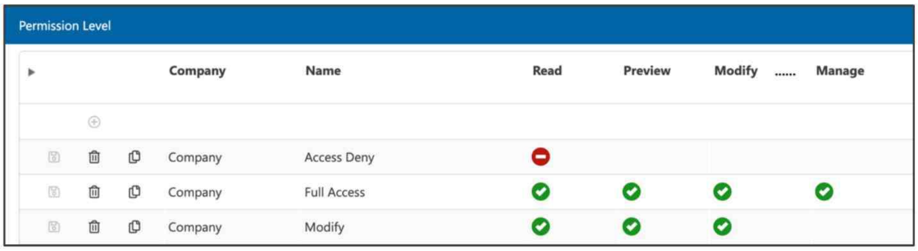
3. For more information, please refer to section "Rules and Sequence" in "A624002 – Antelope 6 Workspace Administration Manual".

IV. Filter Owner

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



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

Company	Name	Read	Preview	Modify	......	Manage
Company	Access Deny	⛔				
Company	Full Access	✔	✔	✔		✔
Company	Modify	✔	✔	✔		

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 EP-0042 | 13 KB | 1.0 | 2024-09-01 14:51:24 | Jennifer Tam EP-0043 | 13 KB | 1.0 | 2024-09-01 14:52:42 | Antelope EP-0044 | 13 KB | 1.0 | 2024-09-01 14:52:56 | User1 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 EP-0044 | 13 KB | 1.0 | 2024-09-01 14:52:56 | User1
User2	No	File Name | Size | Version | Version Date | Version By EP-0045 | 13 KB | 1.0 | 2024-09-01 14:54:18 | 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.

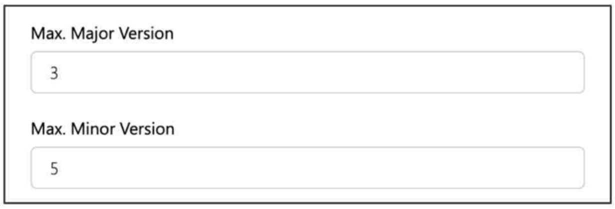
2. Whenever there are content changes in the document, the version will increase by 0.1, until the document is published to another major version.

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.

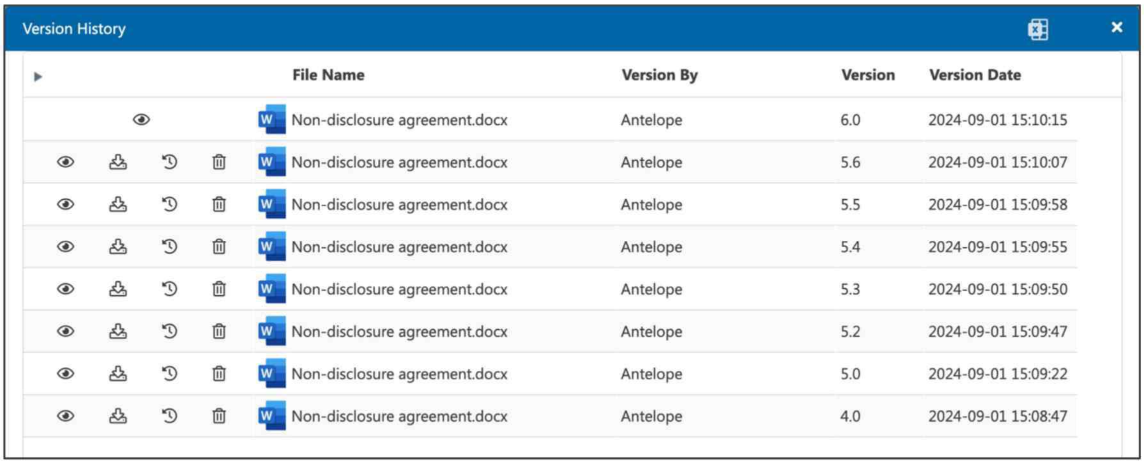
4. For more information, please refer to Section N (VII).

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.



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).

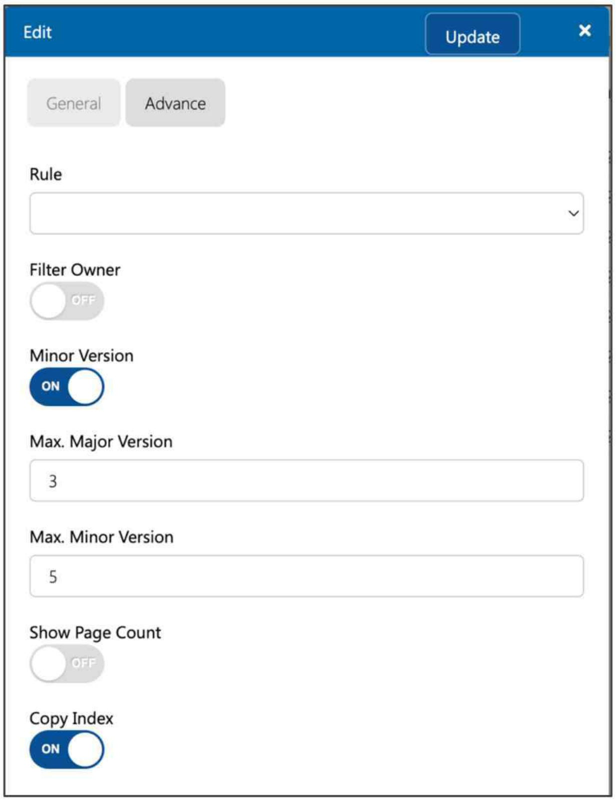


File Name	Version By	Version	Version Date
Non-disclosure agreement.docx	Antelope	6.0	2024-09-01 15:10:15
Non-disclosure agreement.docx	Antelope	5.6	2024-09-01 15:10:07
Non-disclosure agreement.docx	Antelope	5.5	2024-09-01 15:09:58
Non-disclosure agreement.docx	Antelope	5.4	2024-09-01 15:09:55
Non-disclosure agreement.docx	Antelope	5.3	2024-09-01 15:09:50
Non-disclosure agreement.docx	Antelope	5.2	2024-09-01 15:09:47
Non-disclosure agreement.docx	Antelope	5.0	2024-09-01 15:09:22
Non-disclosure agreement.docx	Antelope	4.0	2024-09-01 15:08:47

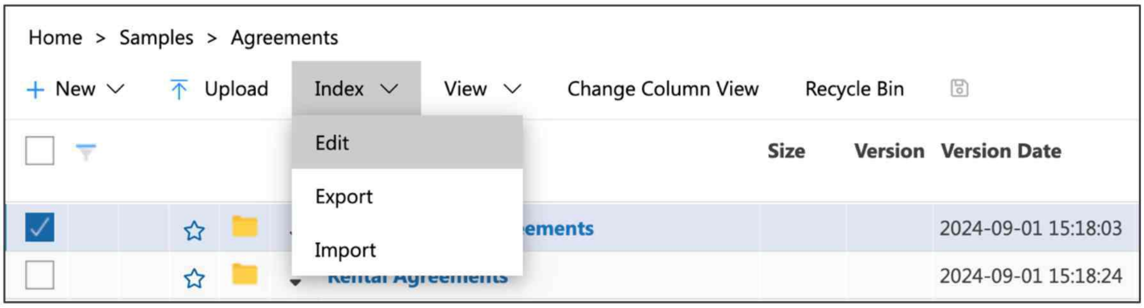
Note: In the above case, only the latest 3 major versions are retained (V 4,5,6), while the latest 5 minor versions are retained also (V 5.2, 5.3, 5.4, 5.5, 5.6)

VII. Copy Index

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



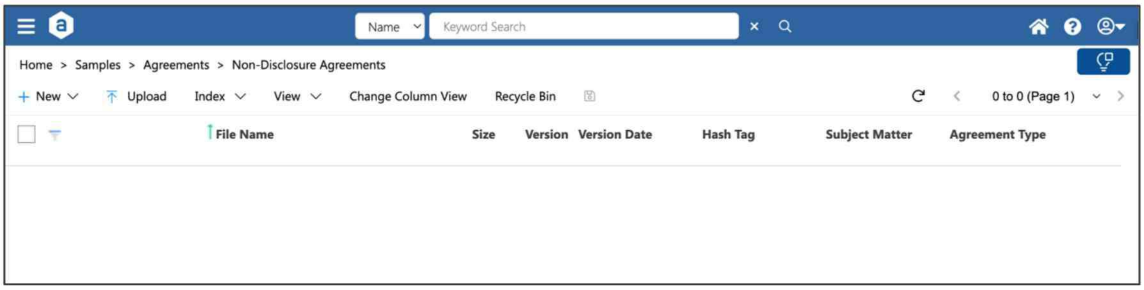
2. Select "Index" menu from the toolbar, then select "Edit" option.



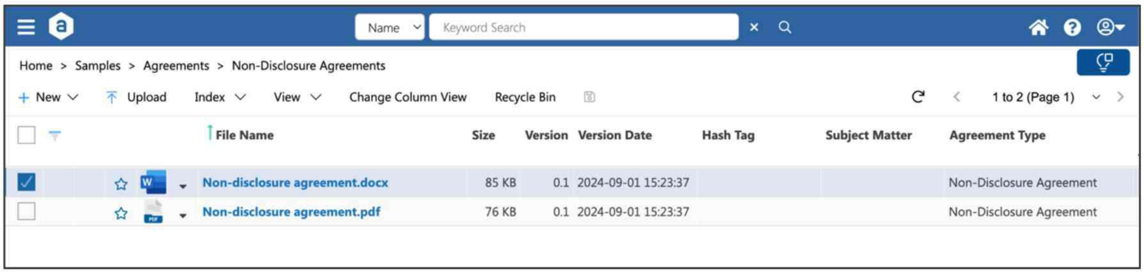
3. Input meta-data for the folder.

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.



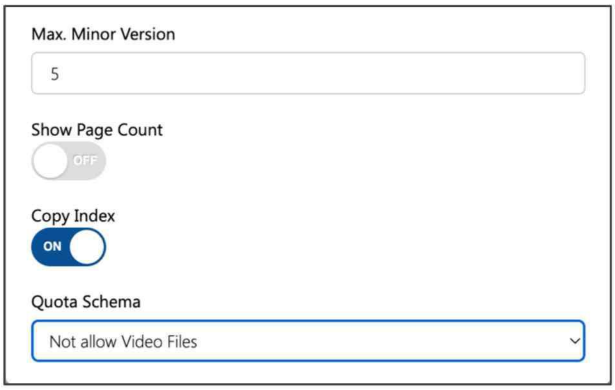
Upload new document to this folder…



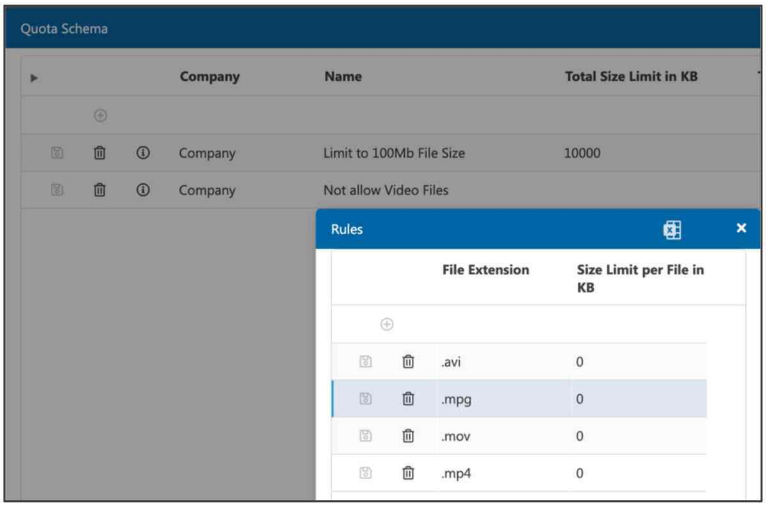
All documents index field values are inherited from their parent folder.

VIII. Quota Schema

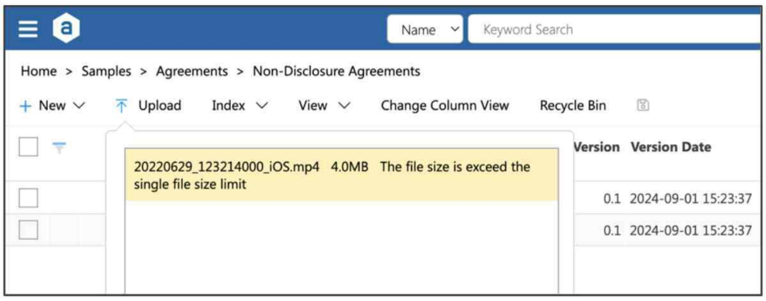
1. Quota scheme is a control rule which limit the folder storage capacity or criteria with one of the following options:
    a. What document types are allowed to upload
    b. Maximum number of documents
    c. Maximum storage of documents



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

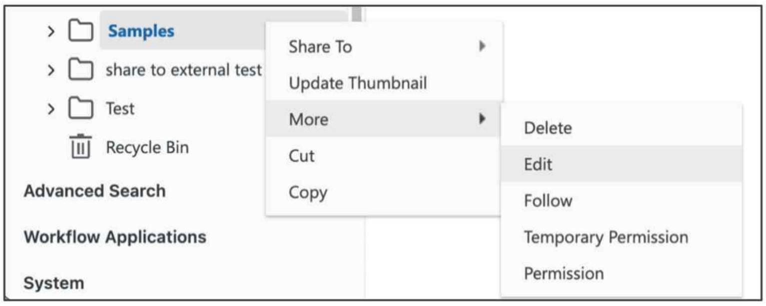


3. Once the quota limit is set, there will be a control on the document to upload.

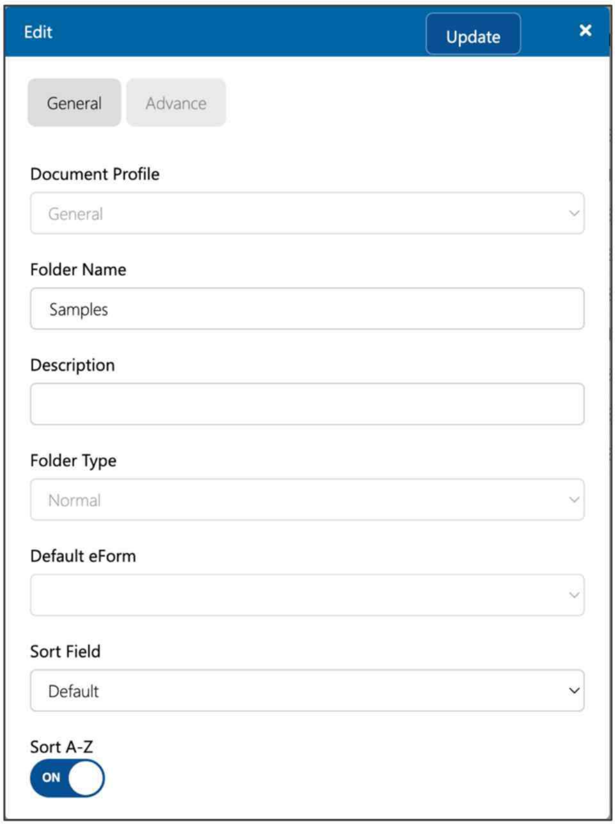


IX. Edit Folder

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



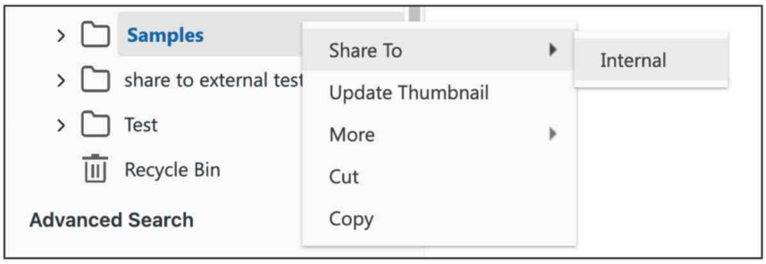
2. The “Edit” window will appear.



3. Click “Update” button to commit changes.

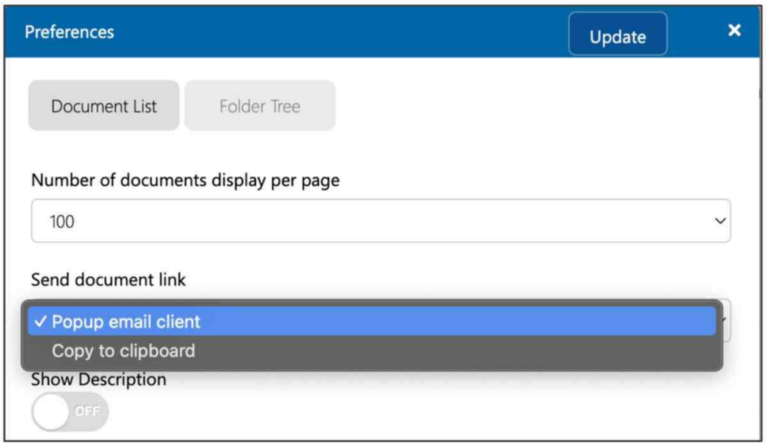
X. Share Folder Link to Internal User

1. To share a folder as hyperlink to internal user, select the folder you want to share, right-click to bring up the context menu, then select “Share To > Internal”.



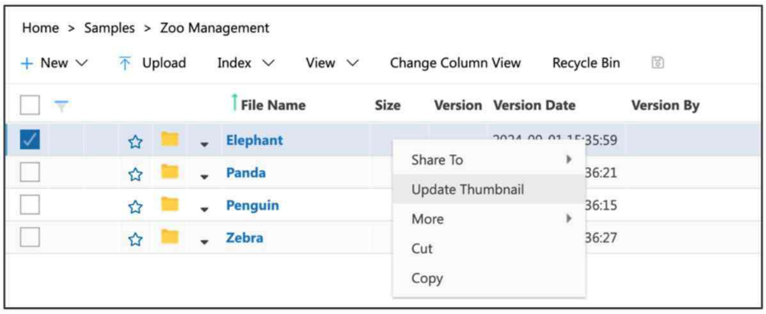
2. This will copy the share link to clipboard or pop-up the default email client.
   https://apac.antelopecloud.net/demo/main.aspx?sId=OGJHHNDFGHGIXXXXXXXXXXXXX

3. The action preference can be configured by system administrator under “Setup > Setting > Preference > Send Document Link”.

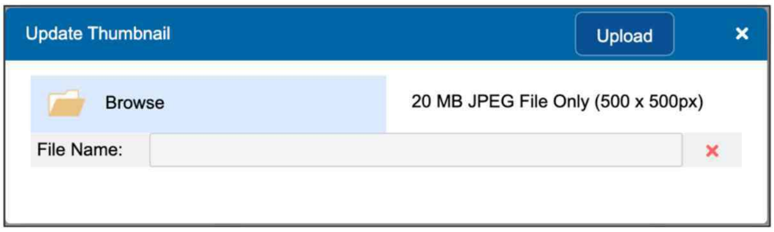


XI. Update Folder Thumbnail

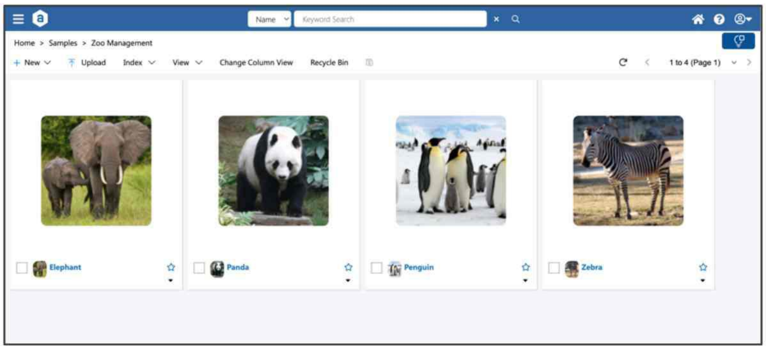
1. Select a folder you want to change thumbnail, right-click to bring up the context menu, select "Update Thumbnail".



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

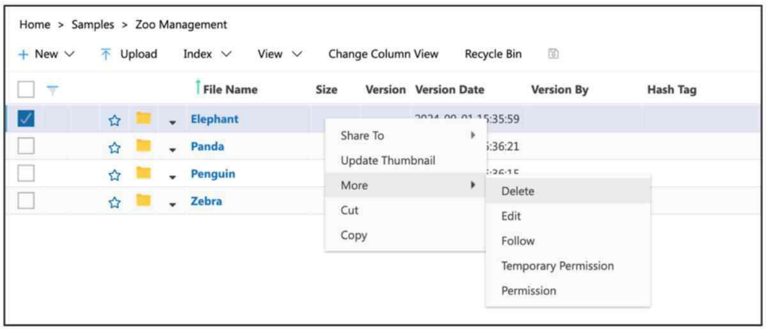


3. To view the folder thumbnail, from the document list toolbar, select View > Thumbnail.



XII. Delete Folder

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



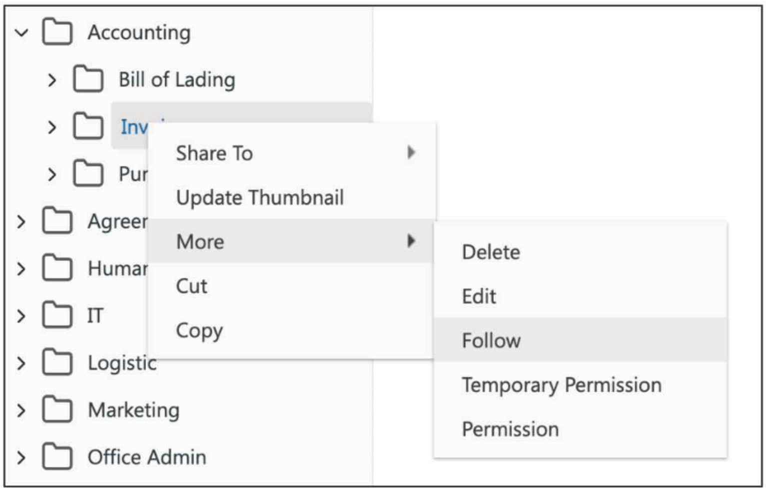
2. A confirmation message will appear, click “Yes” button to confirm.

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.

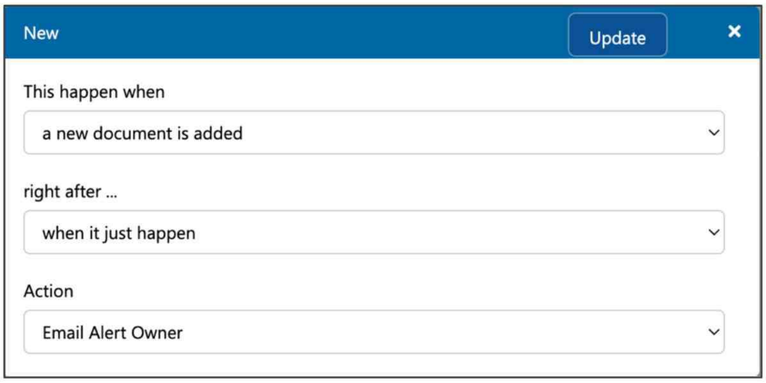
I. Create New Follow

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



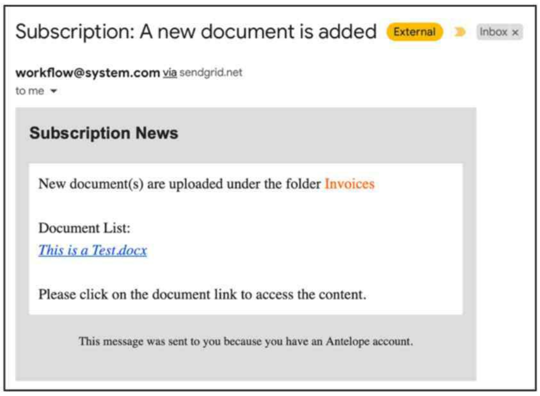
2. The Follow window will appear. Click the "Add" icon.

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.



4. A new Follow rule is added.

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.

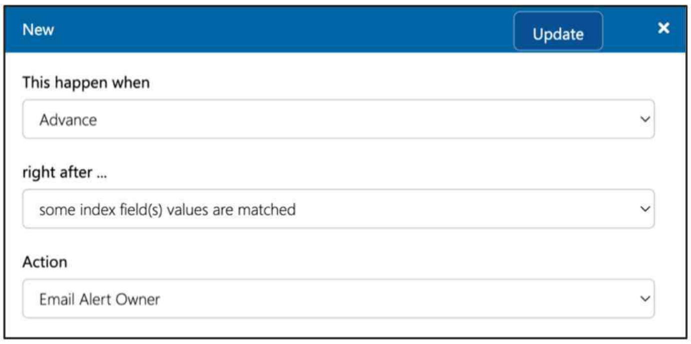
Right After…	
Options	**Description**
some index field(s) values are matched	Refer to Section IV.
When it just happens	Right after user complete the action, for examples, add document, update index, update version etc.
The document is modified for 3 years.	After the document is modified for three years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

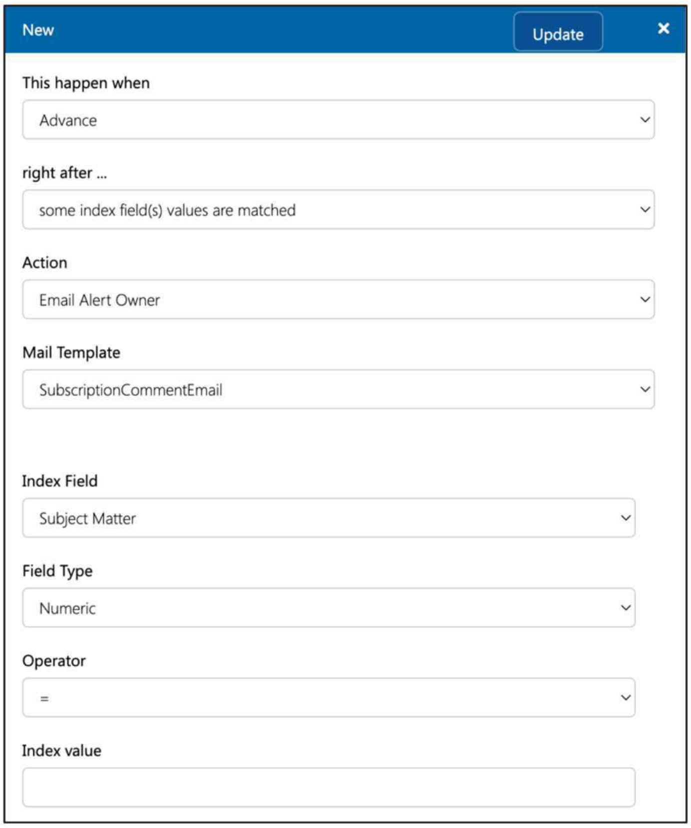
III. Tigger by Index Field

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.

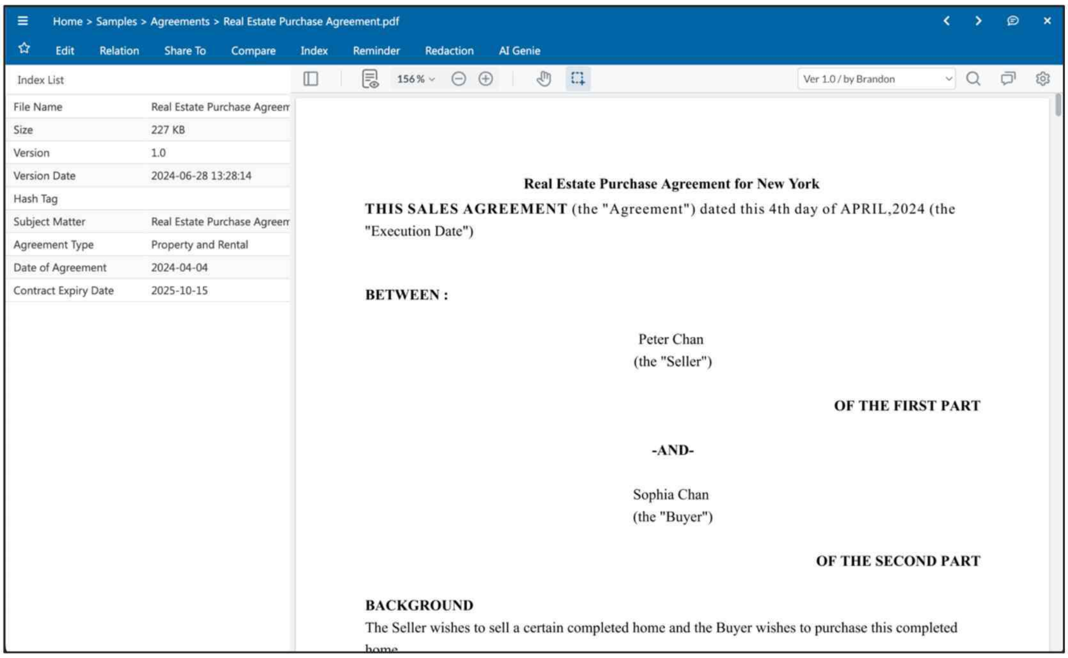
2. Select "Advance" and "some index field(s) values are matched".



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



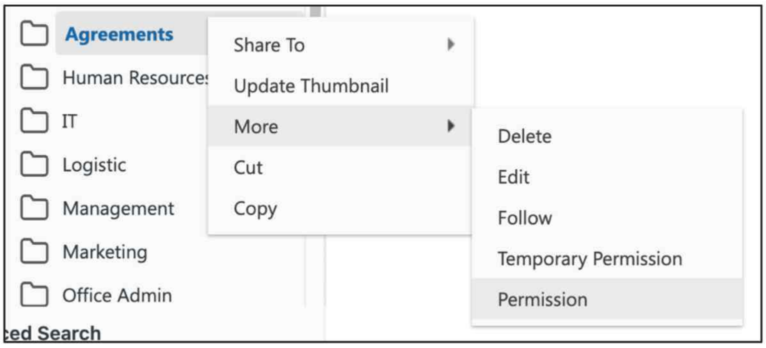
4. Here is an example, if you want the system to notify the document owner when the contract date reaches 30 days before “2025-10-15”, then you should set the Index Value “Now() – 30D”



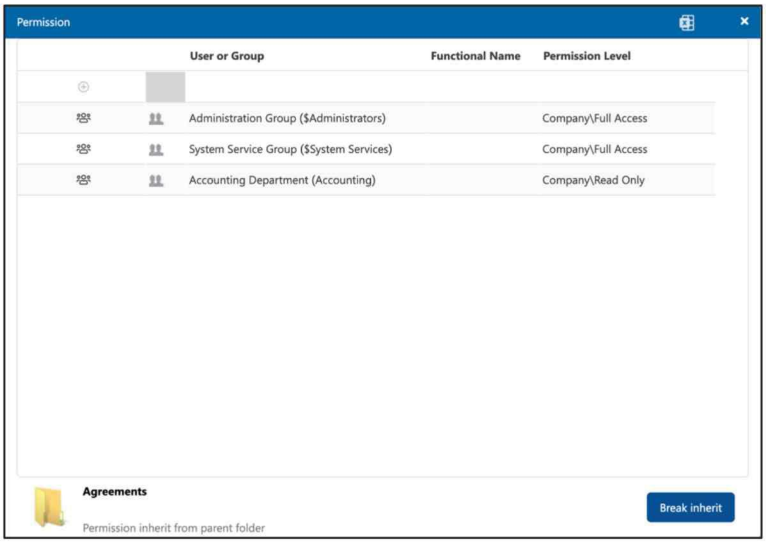
H. Permission

I. Assign Permission

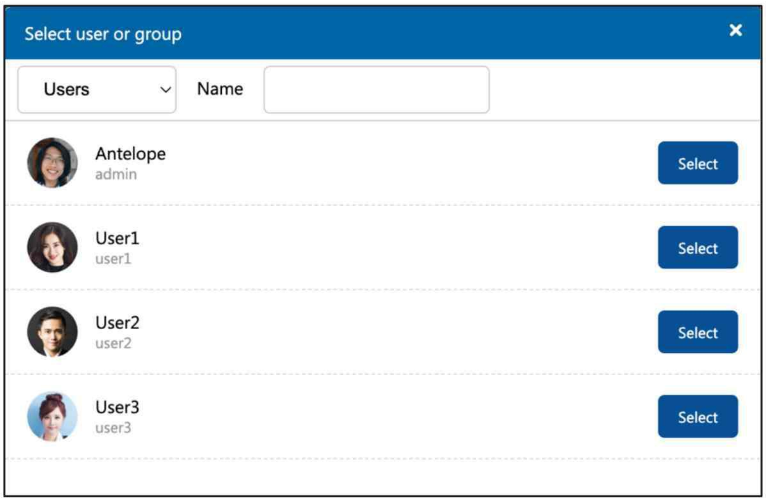
1. To assign a permission, select the folder (or document), right click to bring up the context menu, select More > Permission.



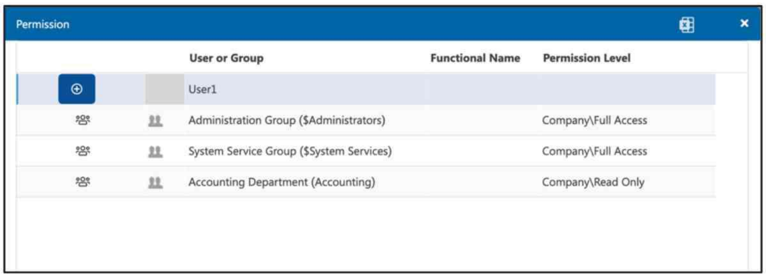
2. The Permission window will appear.



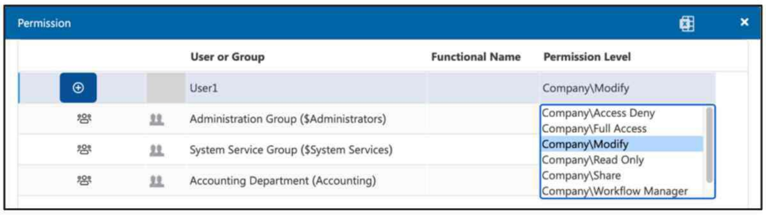
3. Click the first empty row position to bring up the "Select user or group" window.



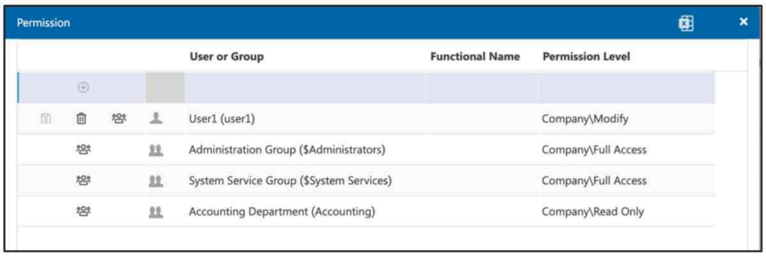
4. Select the user account to add, for example “User1”.



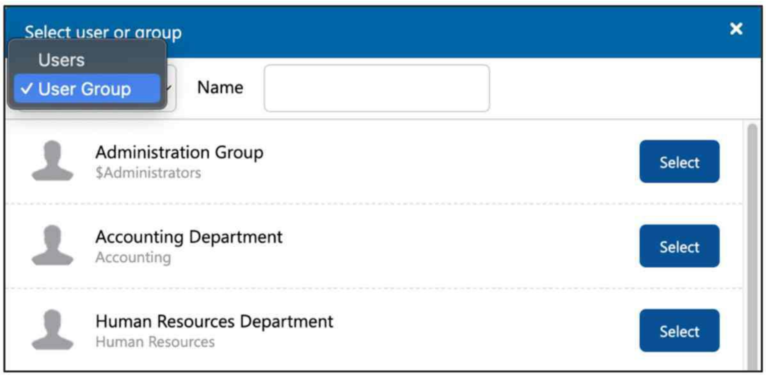
5. Select the “Permission Level”, for example “Modify”.



6. Click the blue add icon to commit changes.



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

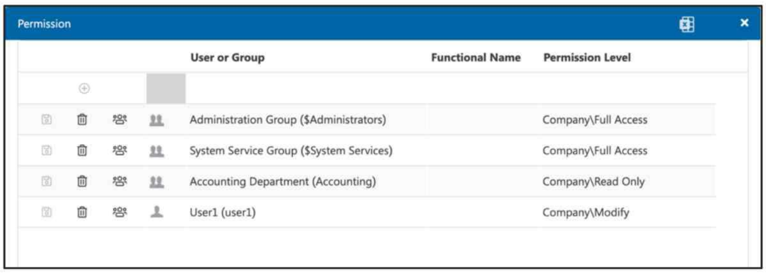


II. Break Inherit

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.

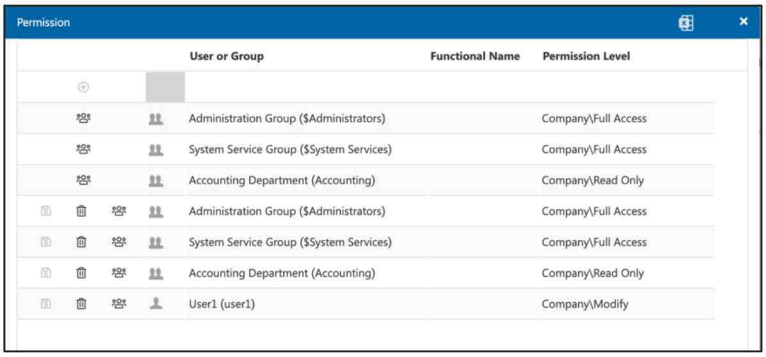
3. All permissions are now effective as standalone and will not inherit from its parent folder. You can remove any effective permission.



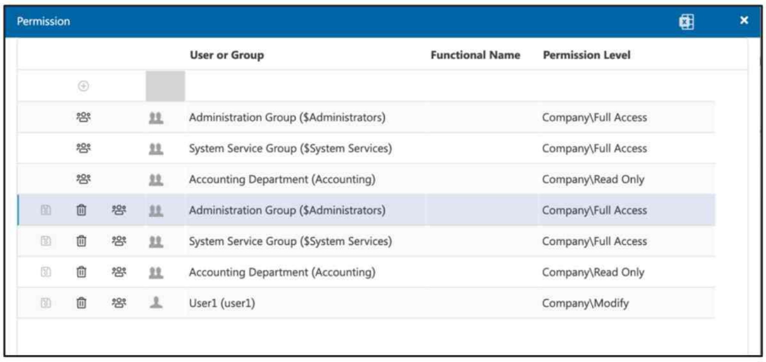
III. Restore Inherit

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.



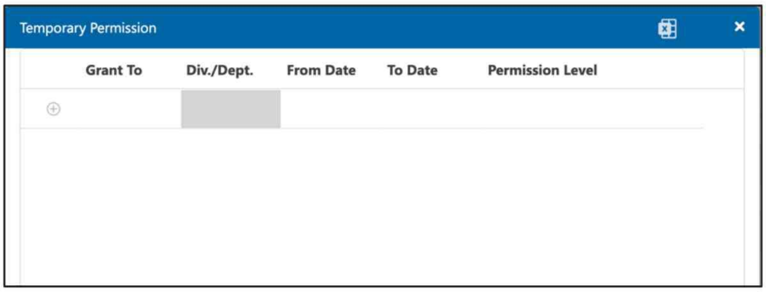
3. You should remove those existing permission which contradict or duplicate with the original one.



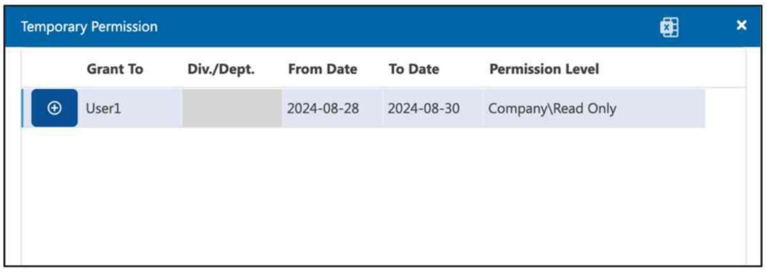
I. Temporary Permission

I. Assign Temporary Permission

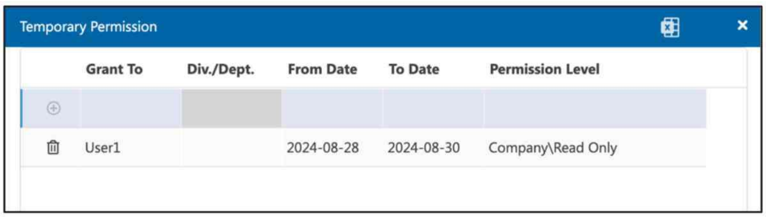
1. You can assign a temporary permission for any user account to access the current folder.



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



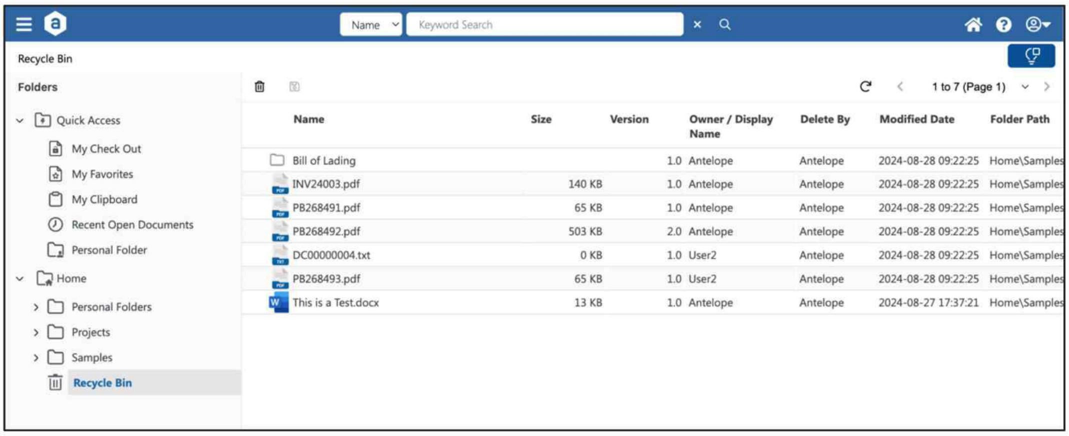
3. Click the blue add icon to commit changes.



J. Recycle Bin

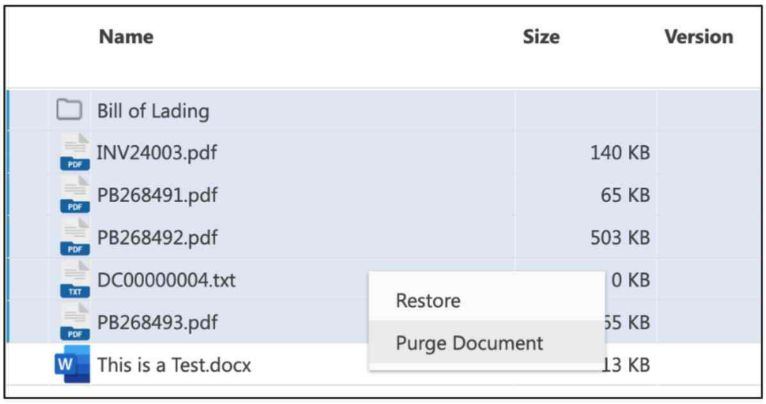
I. Recycle Bin View

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

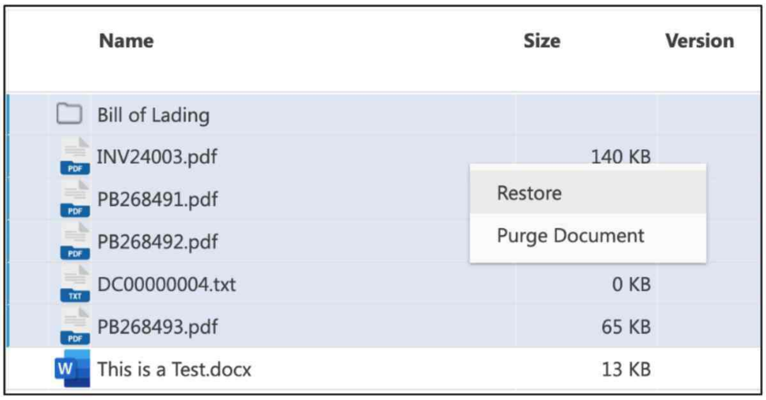


2. To purge all documents, click the recycle bin icon from the top of the list.

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

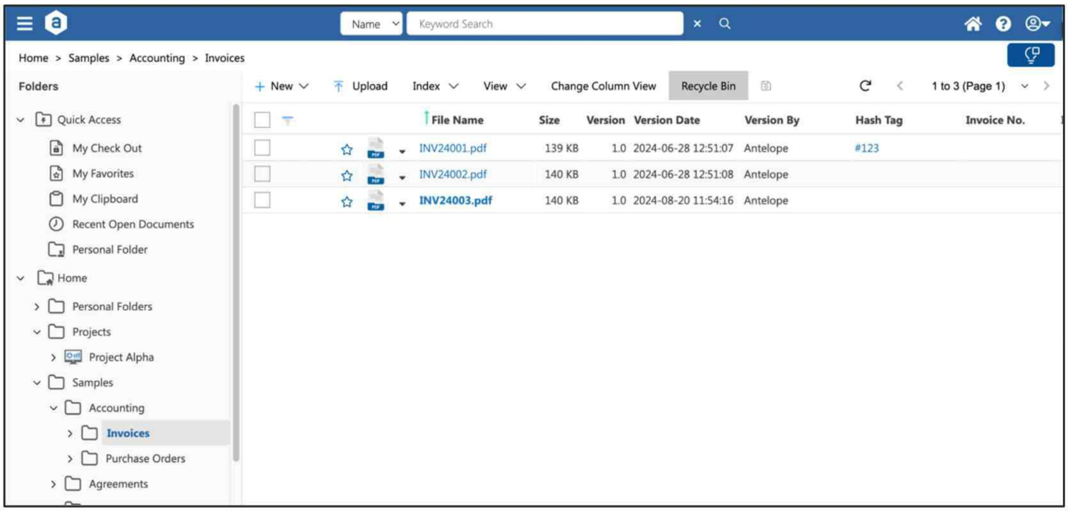


4. To restore the deleted documents, click “Restore” from the context menu. However, if the documents’ parent folder is already removed, you cannot restore any content.

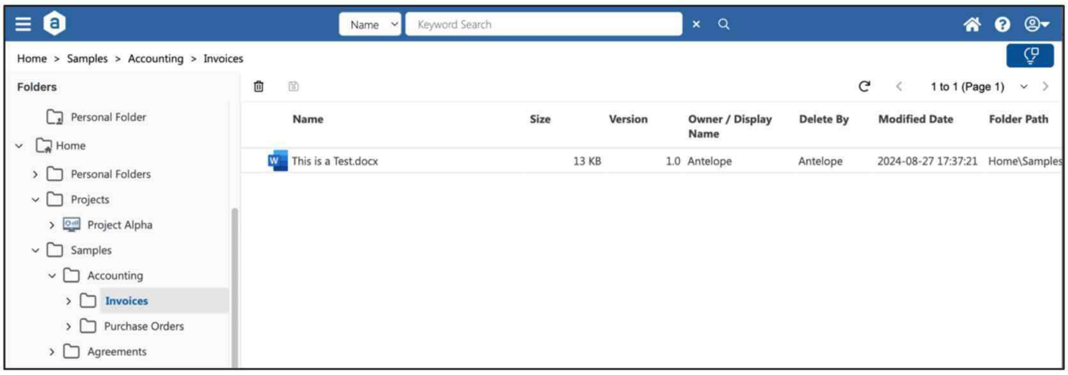


II. Folder Recycle Bin

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



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

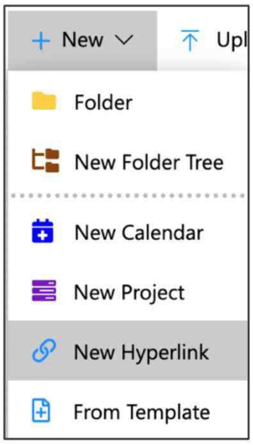


K. Hyperlink

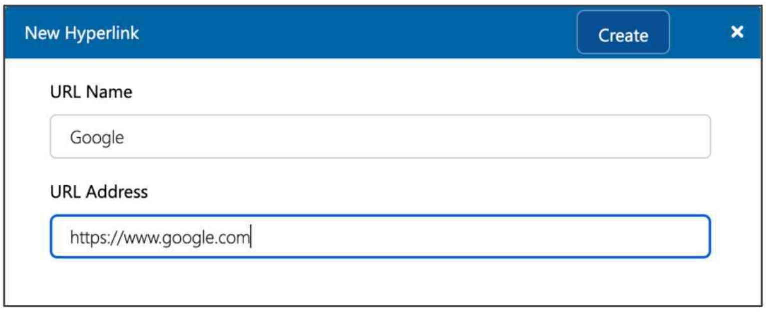
I. Create New Hyperlink

1. To create a new link, select a folder.

2. Select "New" context menu, then "New Hyperlink".



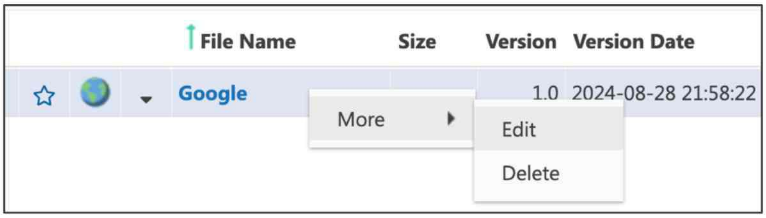
3. The New Hyperlink window will appear. Input the "Name" and "URL Address".



4. Click "Create" button to save.

II. Edit Hyperlink

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



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.

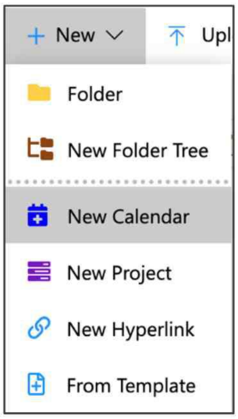
2. A pop-up message will ask for confirmation. Click "OK" to commit.

L. Calendar

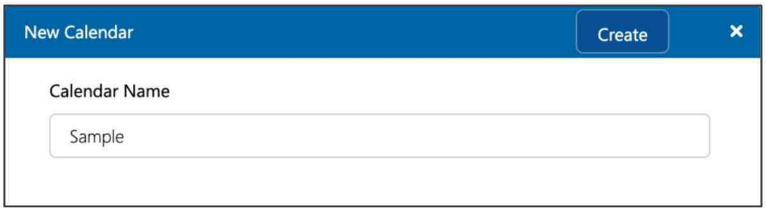
I. Create New Calendar

1. To create a new calendar, select a folder.

2. Select "New" context menu, then "New Calendar".



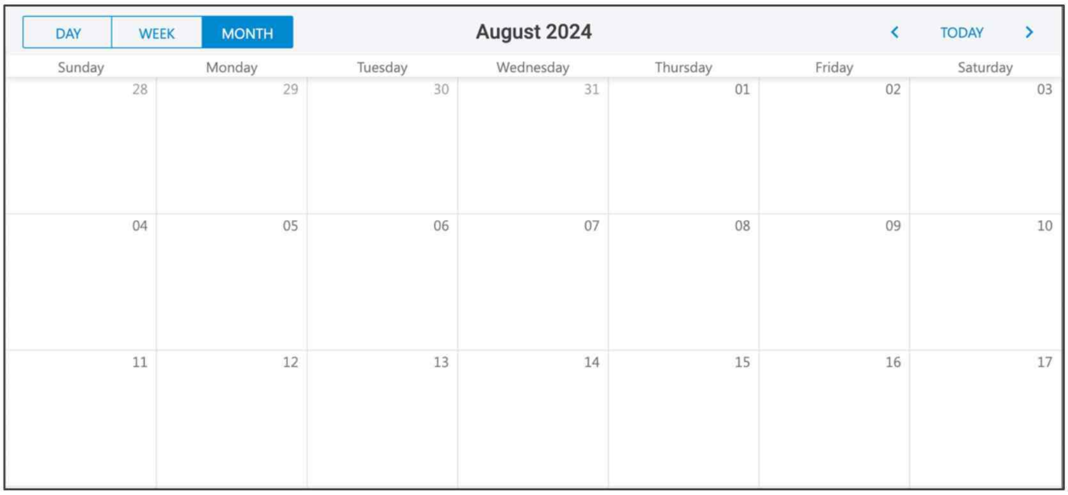
3. The New Calendar window will appear. Input the “Name”.



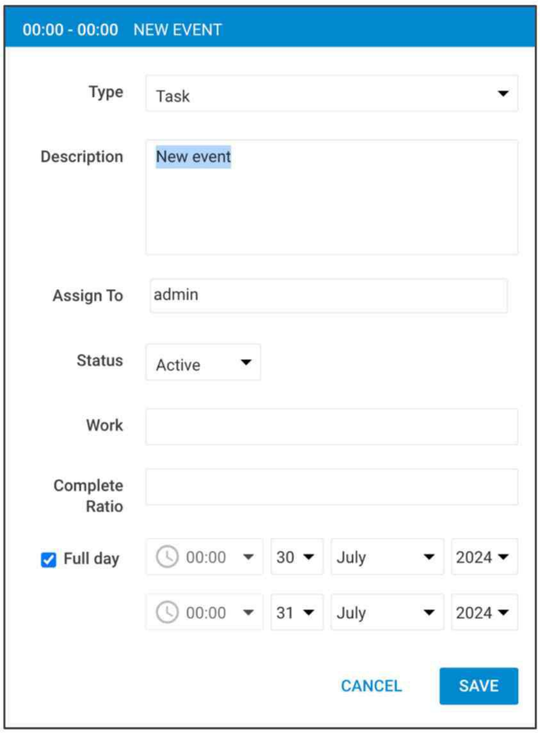
4. Click “Create” button to save.

II. Create Activity

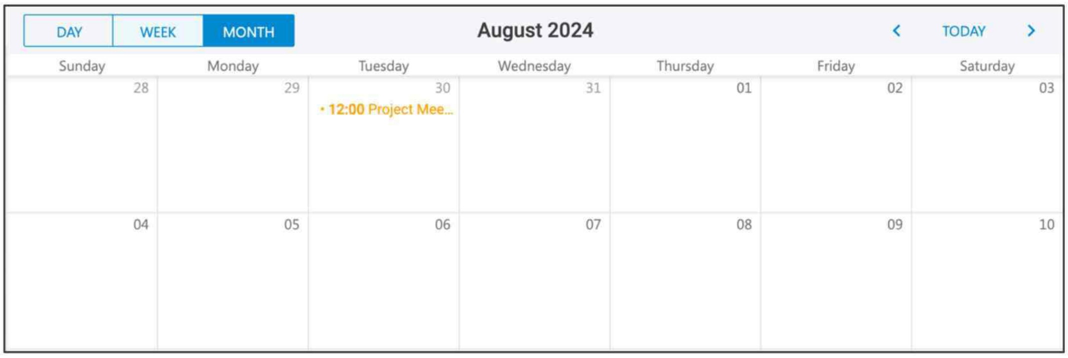
1. Click the calendar record to open the calendar view.



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.



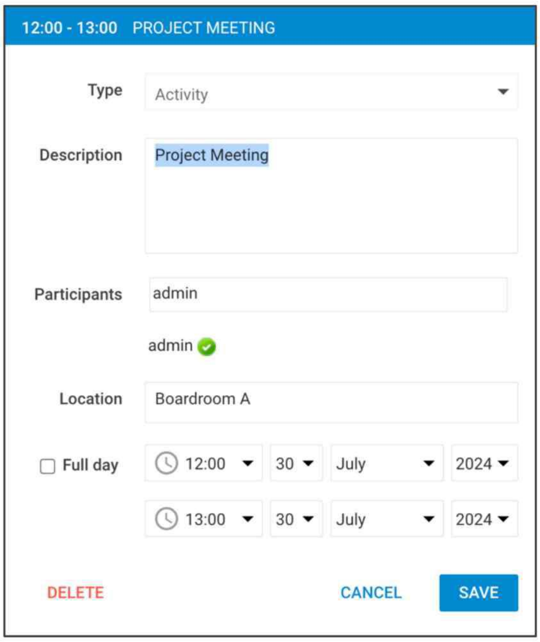
3. Click “Save” button to commit changes.



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.

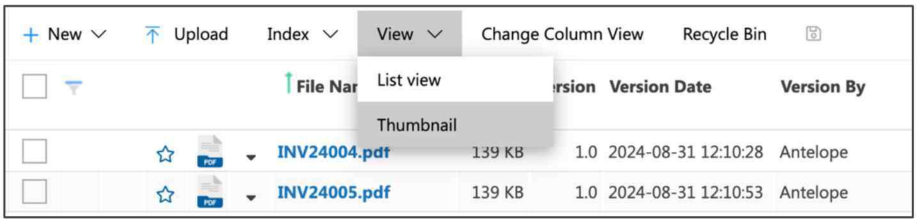


M. Document List

I. Document List and Thumbnail View

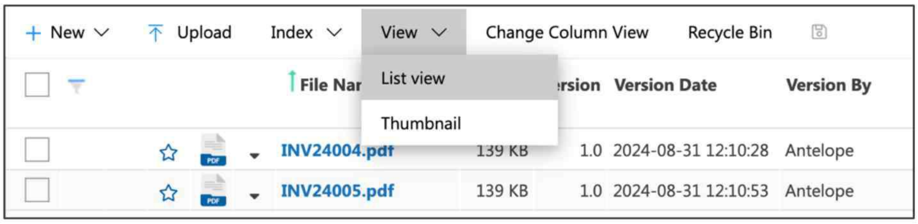
1. The document list shows the name, properties and index fields.

2. To change into thumbnail view, from the document list toolbar, click View > Thumbnail.



3. The documents are shown in thumbnail.

4. To change back to document list view, from the document list toolbar, click View > List View.

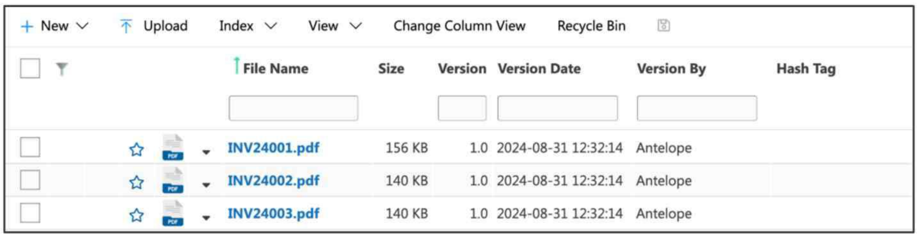


II. Column Filter

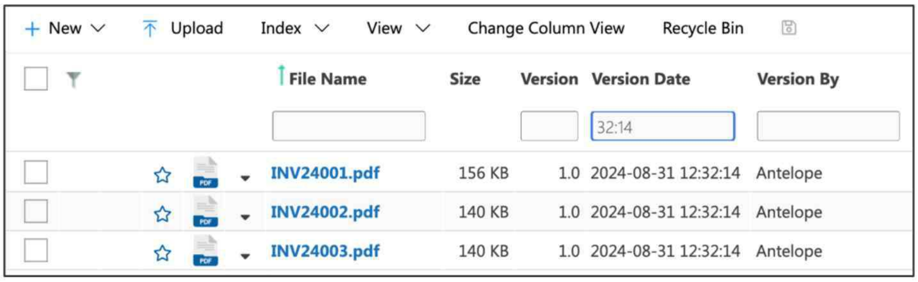
1. Apart from document full-text search and advanced search, you can also perform a quick searching using column filter.

2. From the document list, click the icon.

3. The column filter will appear.



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

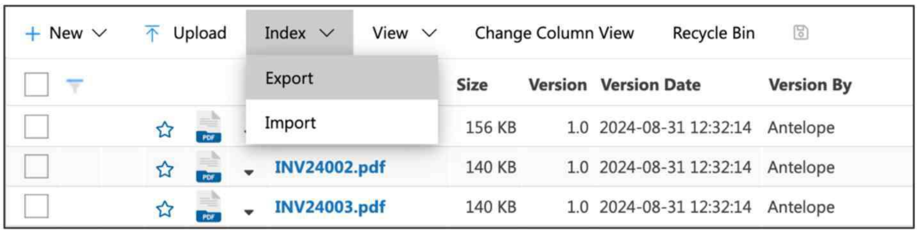


5. The following data type cannot be searched by column filter: Hashtag, Details Line Items, Date Range (e.g. 2024-08-12 to 2024-08-30).

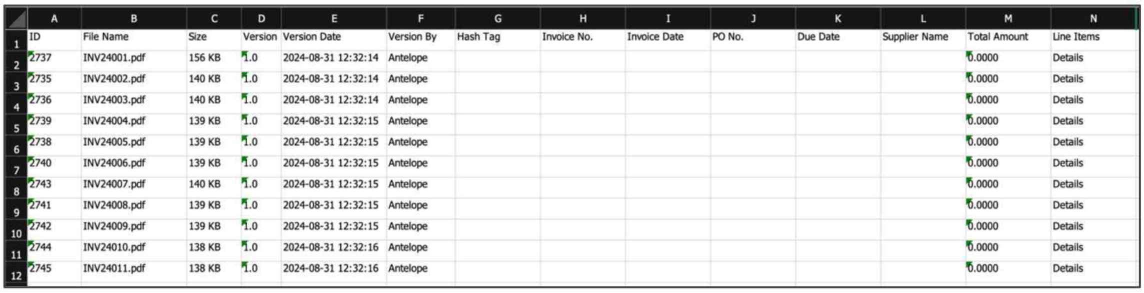
III. Export List

1. You can export the document list into .xlsx format.

2. From the document list toolbar, click Index > Export.



3. The document list is exported as “export.xlsx”

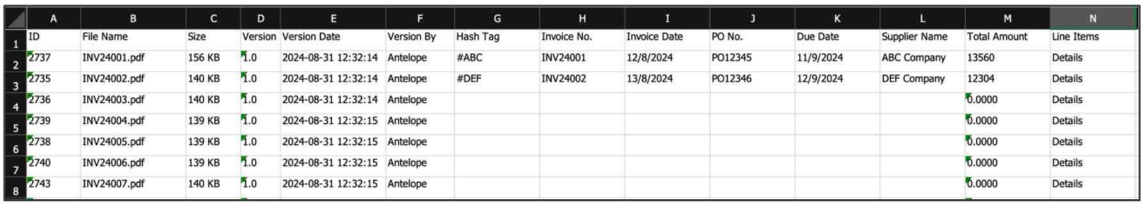


ID	File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2737	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
2735	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
2736	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
2739	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2738	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2740	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2743	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2741	INV24008.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2742	INV24009.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2744	INV24010.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details
2745	INV24011.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details

IV. Import List

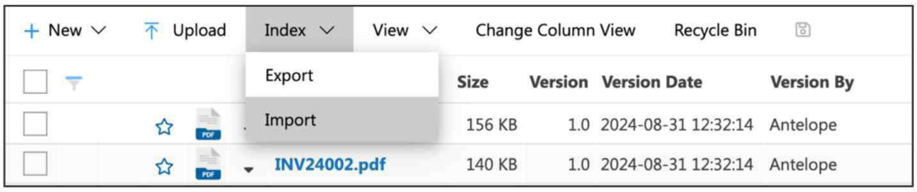
1. You can modify the “export.xlsx” and import to the document list for purpose of batch indexing.

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.

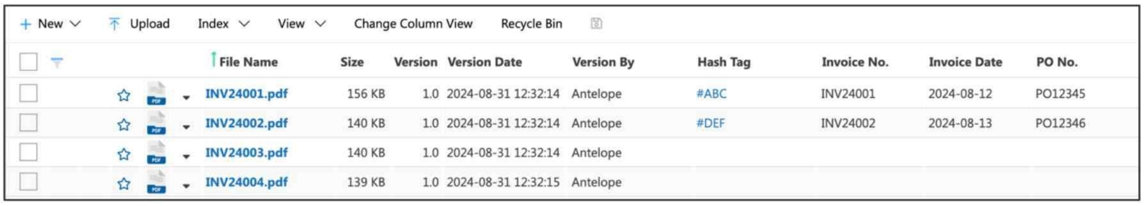


ID	File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2737	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	#ABC	INV24001	12/8/2024	PO12345	11/9/2024	ABC Company	13560	Details
2735	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	#DEF	INV24002	13/8/2024	PO12346	12/9/2024	DEF Company	12304	Details
2736	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
2739	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2738	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2740	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
2743	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details

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

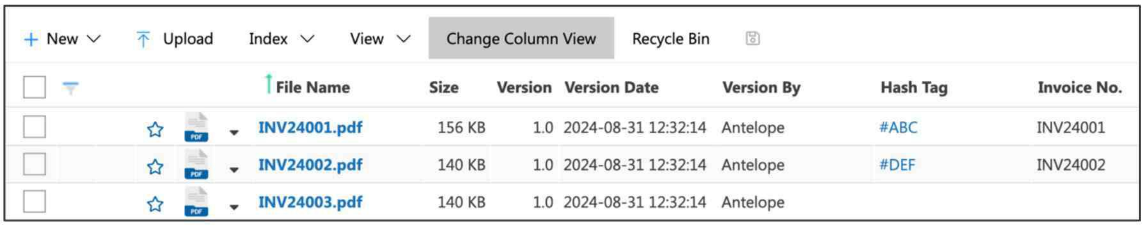


4. The document list is indexed automatically.

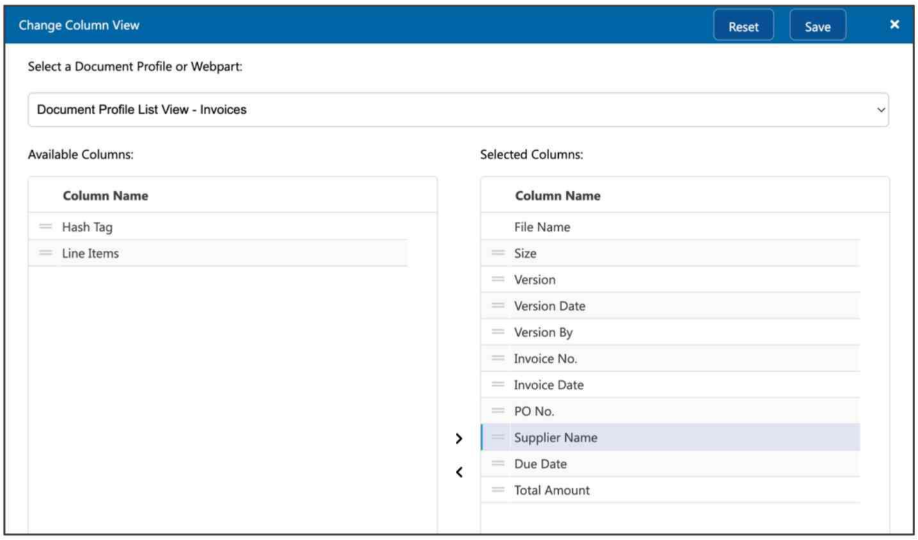


V. Change Column View

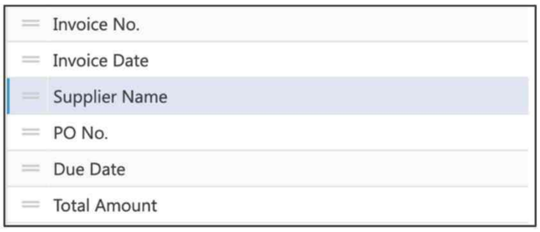
1. You can change the sequence of column or hide any column of the specific folder by “Change Column View”. From the document list toolbar, click the “Change Column View” button.



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

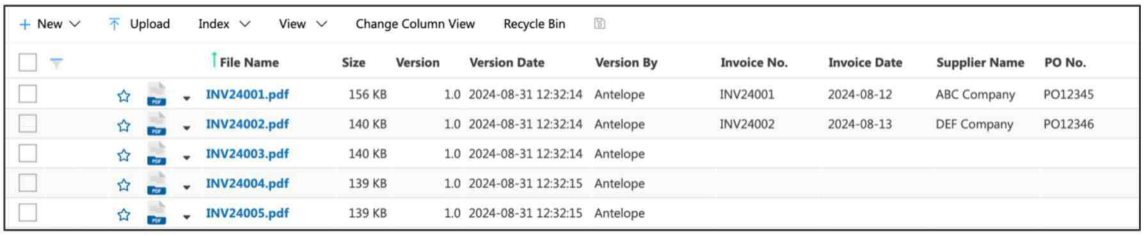


3. Drag and drop the column up and down to re-order their position.



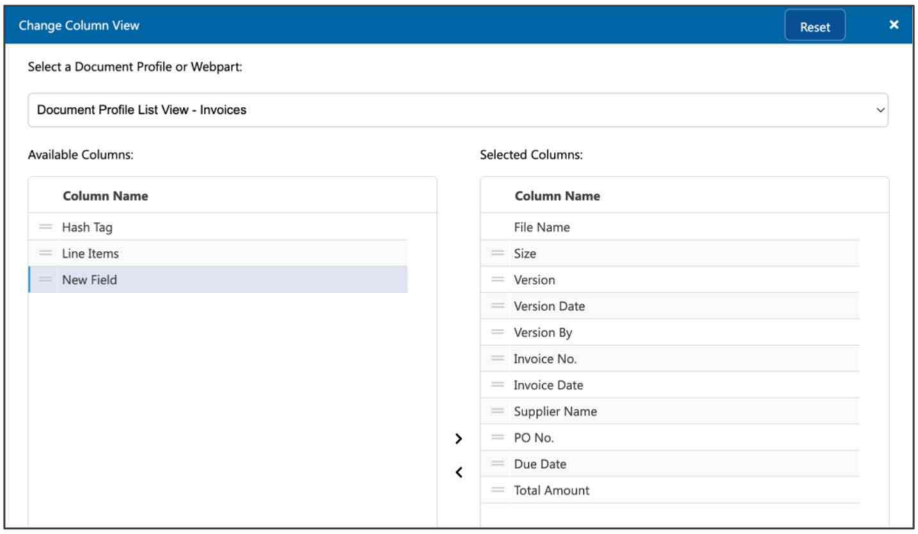
4. Click the blue “Save” button to commit changes.

5. The document list columns will re-order for the selected folder of your own user account according to your setting.



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

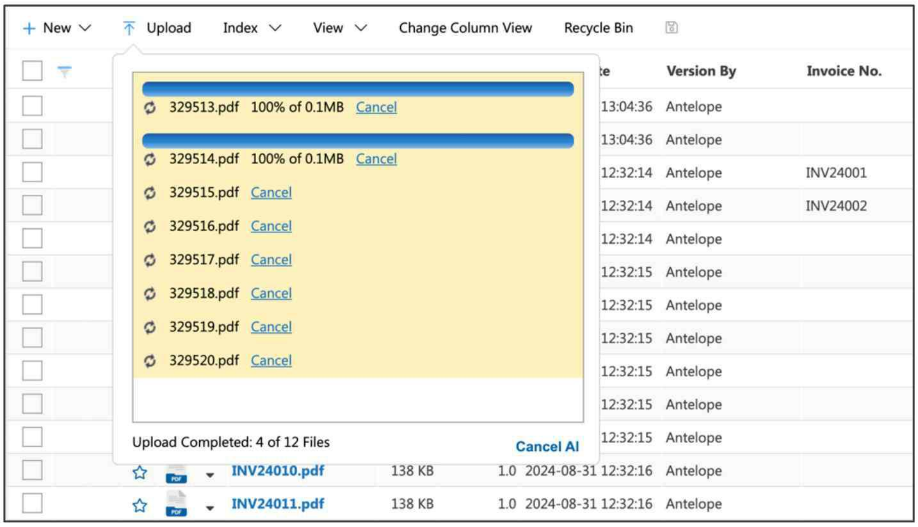
7. Pay attention that since you have customized the folder display setting, in case your system administrator has added a new index field, your folder document list will not reflect this new setting until you make another “Reset” or “Configuration” of your column view.



N. Document

I. Upload Document

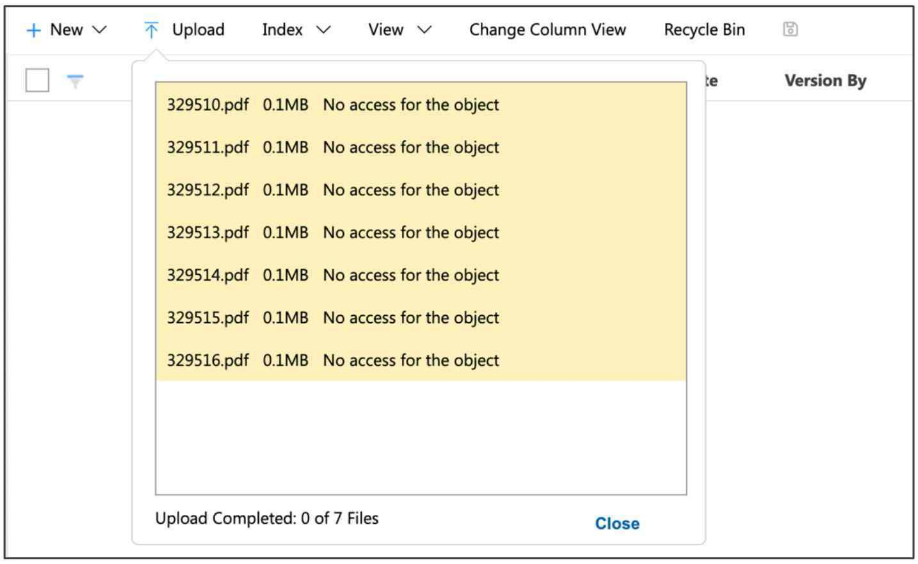
1. To upload a document, drag and drop the file(s) from your desktop to the document list.



2. The upper limit of upload size per document is 2.0GB.

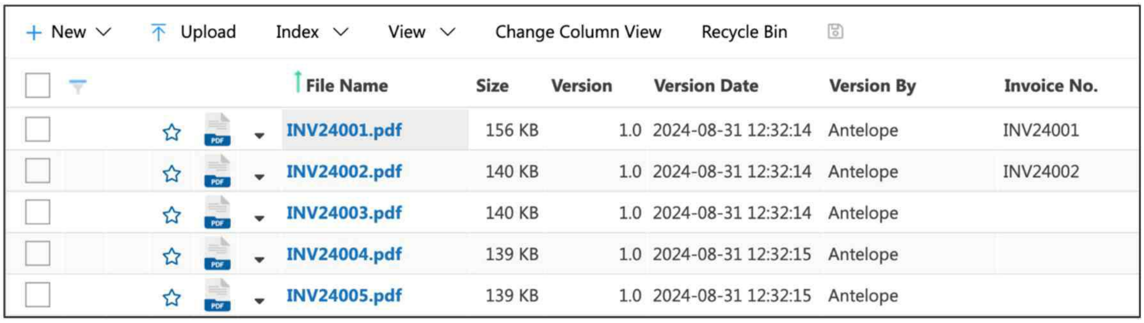
3. In case something wrong during the upload process, please make sure your source documents are not being locked by other applications. If the situation keeps existing,

please contact your system administrator or service provider.



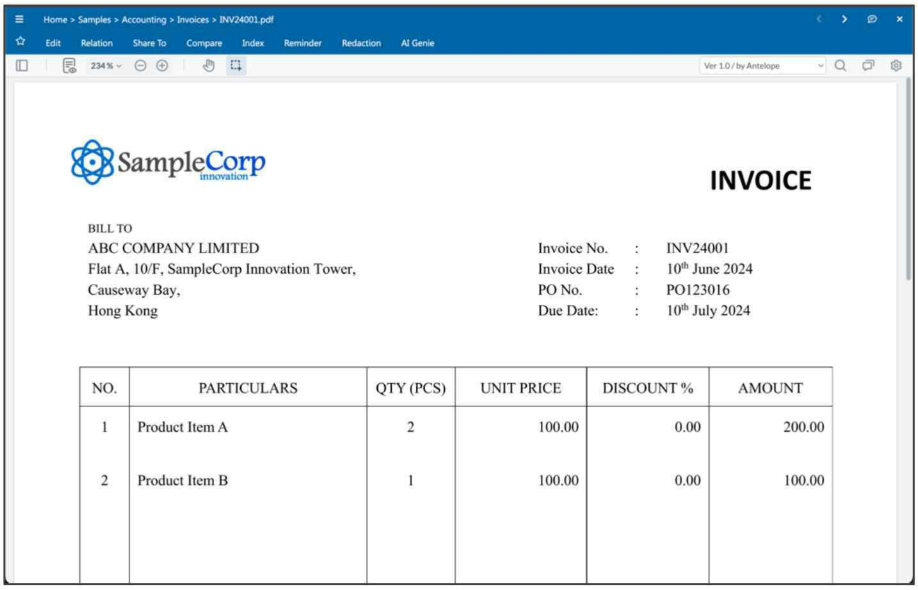
II. Preview Document

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

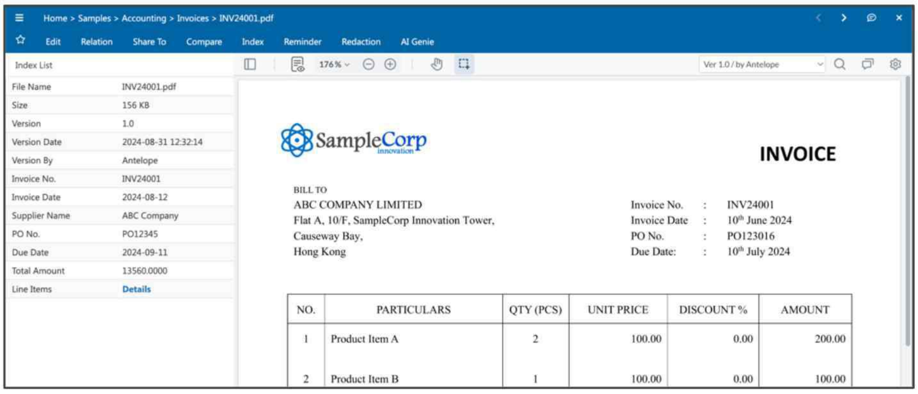


2. Click Preview button.

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



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



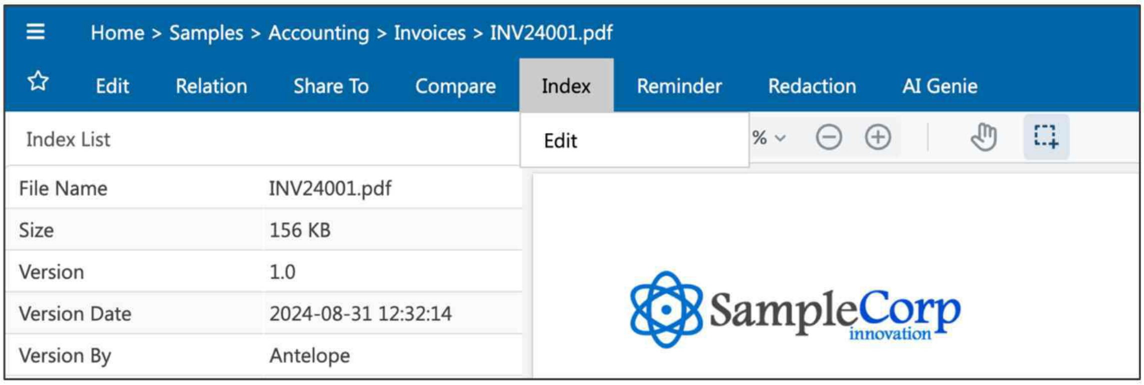
5. The following document type can be previewed on screen by default:

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

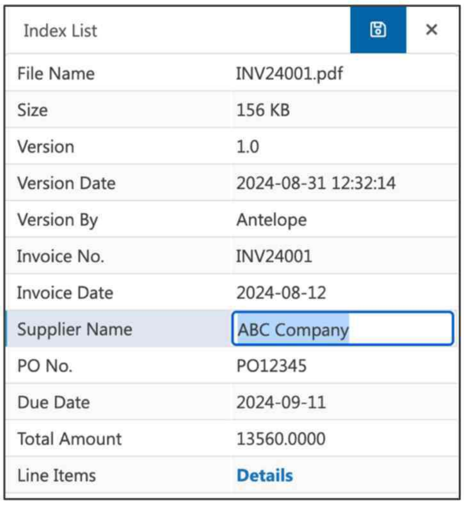
6. Note: The maximum size for document preview is 20 Mb.

III. Index Field

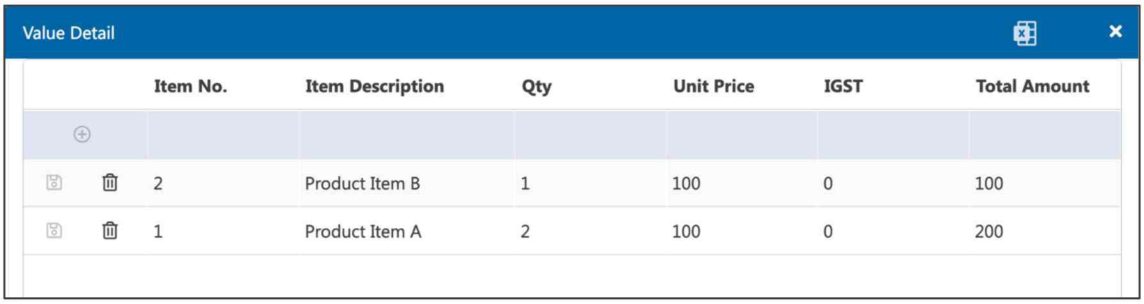
1. To index a document, from the document viewer toolbar, select Index > Edit.



2. Edit the document index.

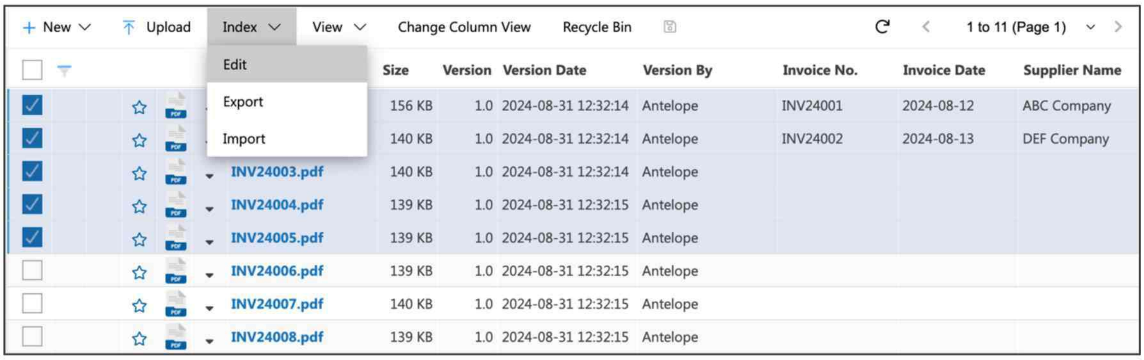


3. For line item, click the "Details" hyperlink to pop-up the line-item window.

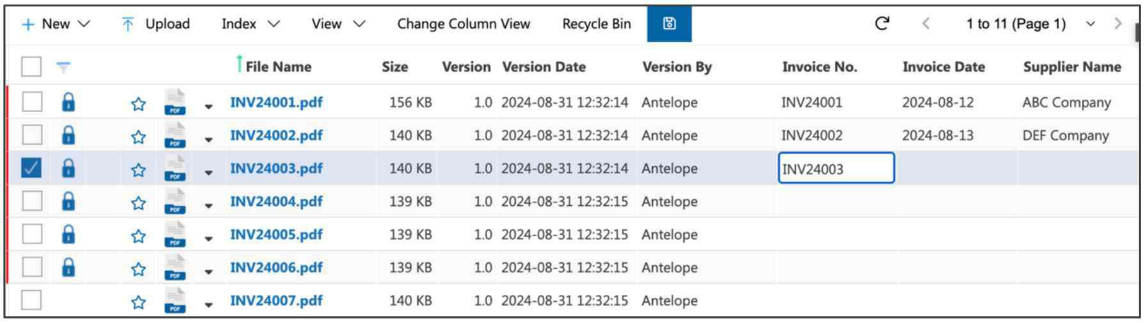


4. Click the blue save button to commit changes.

5. You can also index a batch of documents by selecting Index > Edit from the document list toolbar.

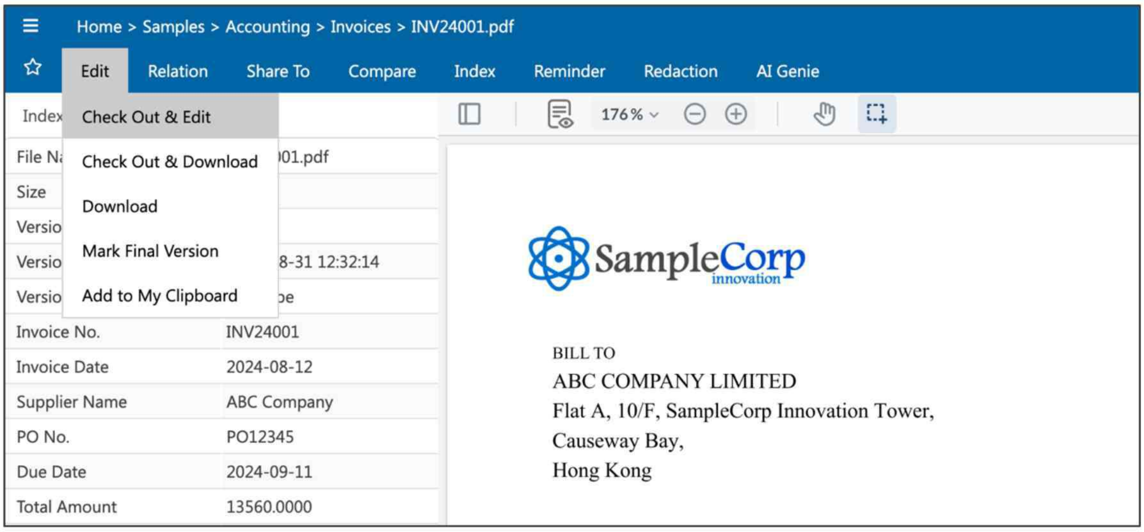


6. Edit the index and click the blue save button to commit changes.

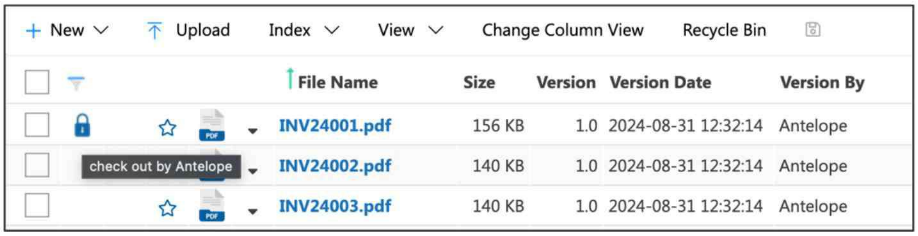


IV. Check-Out and Edit

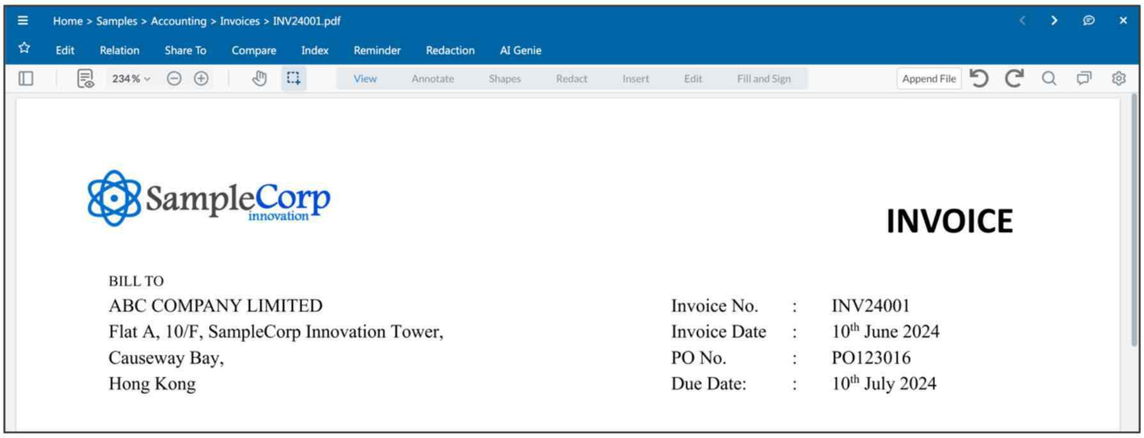
1. To check-out a document for annotation, from the document viewer toolbar, select Edit > Check Out & Edit.



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.



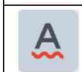
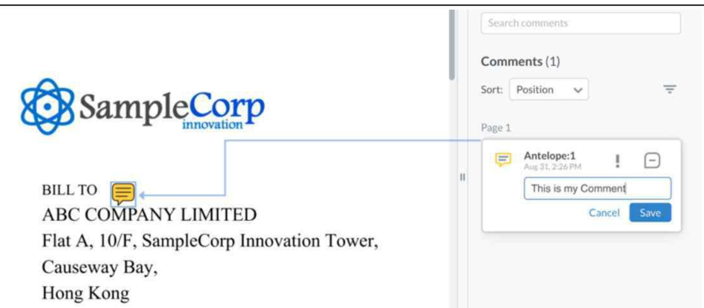
3. Upon check out, the annotation toolbar will be enabled.



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.

a. **Annotate**

Icon	Feature	Description / Sample
	Highlight	BILL TO ABC COMPANY LIMITED
	Underline	BILL TO ABC COMPANY LIMITED
	Strike Out	BILL TO ~~ABC COMPANY LIMITED~~
	Squiggly	BILL TO ABC COMPANY LIMITED
	Note	

	Free Text	BILL TO ABC COMPANY LIMITED Insert text here
	Rectangle	BILL TO ABC COMPANY LIMITED
	Free Hand	BILL TO ABC COMPANY LIMITED
	Free Hand Highlight	BILL TO ABC COMPANY LIMITED
	Redo / Undo	
	Eraser	Erase the annotation objects

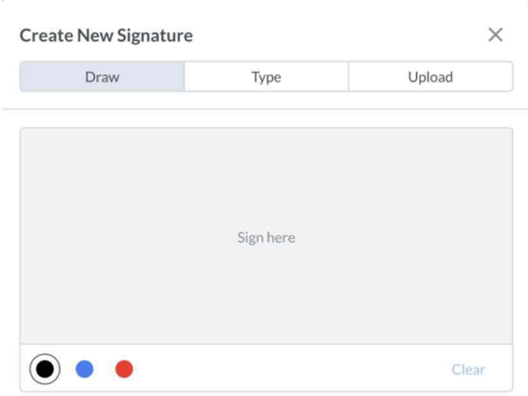
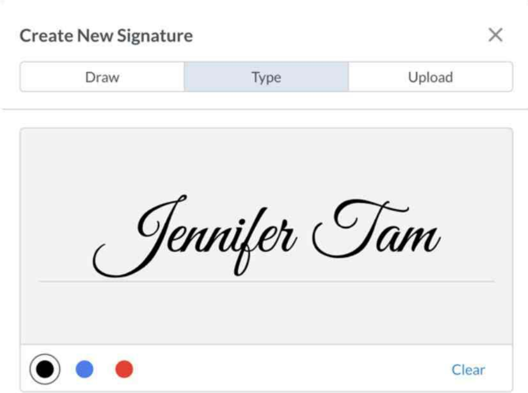
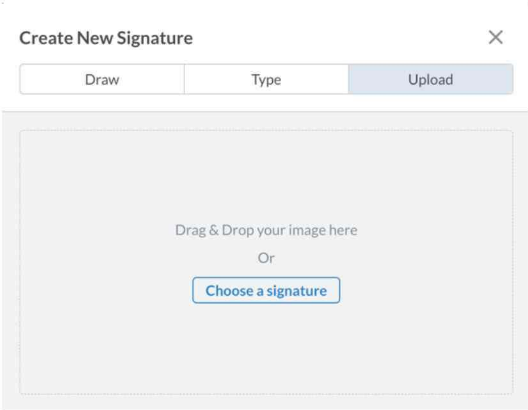
b. **Shapes**

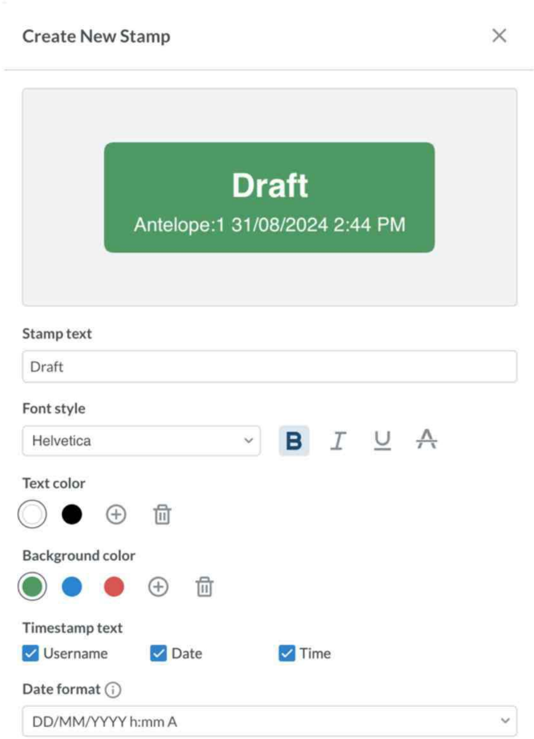
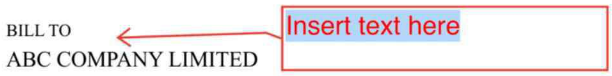
Icon	Feature	Description / Sample
	Free Hand	BILL TO ABC COMPANY LIMITED
	Free Hand Highlight	BILL TO ABC COMPANY LIMITED
	Rectangle	BILL TO ABC COMPANY LIMITED
	Ellipse	BILL TO ABC COMPANY LIMITED
	Polygon	BILL TO ABC COMPANY LIMITED
	Cloud	BILL TO ABC COMPANY LIMITED Flat A, 10/F, SampleCorp Innovation Tower,
	Line	BILL TO ABC COMPANY LIMITED
	Polyline	BILL TO ABC COMPANY LIMITED
	Arrow	BILL TO ABC COMPANY LIMITED

c. **Redact**

Icon	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.
	Redaction Panel	

d. Insert

<table>
<tr><th>Icon</th><th>Feature</th><th>Description / Sample</th></tr>
<tr><td></td><td>Signature by Drawing</td><td>
</td></tr>
<tr><td></td><td>Signature by Type</td><td>
</td></tr>
<tr><td></td><td>Signature by Upload image</td><td>
</td></tr>
<tr><td></td><td>Stamp (Standard)</td><td>
</td></tr>
</table>

	Stamp (Custom)	
	Image	Either JPG or PNG format.
	File Attachment	Attach any electronic file,double click to download 
	Call Out	

e. **Edit**

Icon	Feature	Description / Sample
	Crop Page	

f. **Fill and Sign**

Icon	Feature	Description / Sample
	Signature	Please refer to section V (d)
	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)

	Calendar	 BILL TO ABC COMPANY LIMITED 2024-08-31

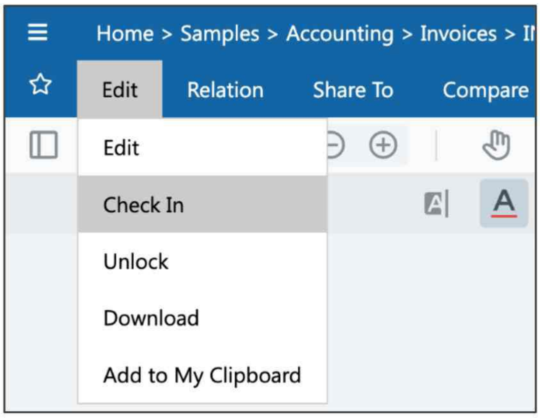
g. **Other Features**

Icon	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 screen ● Download PDF with / without annotation
	Search	Search within the PDF file.

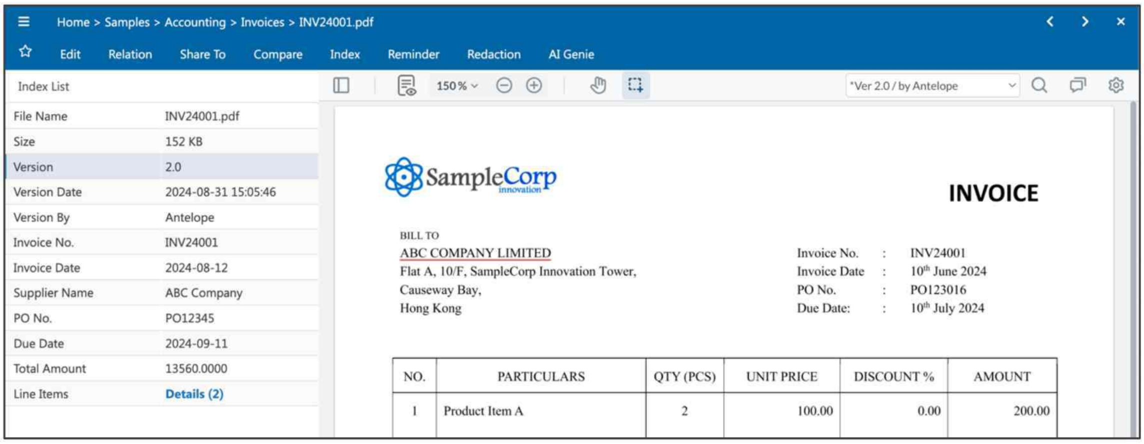
Note: For other documents like Microsoft® Office, CAD drawing, any annotation applied are only placed on the document preview version, it will not alert any of the original document.

VI. Check-In and Unlock Document

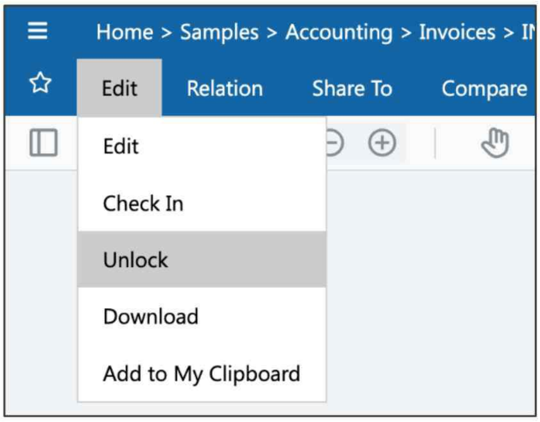
1. After you check-out a document for editing, you are required to check-in for saving. From the document viewer toolbar, select Edit > Check In.



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



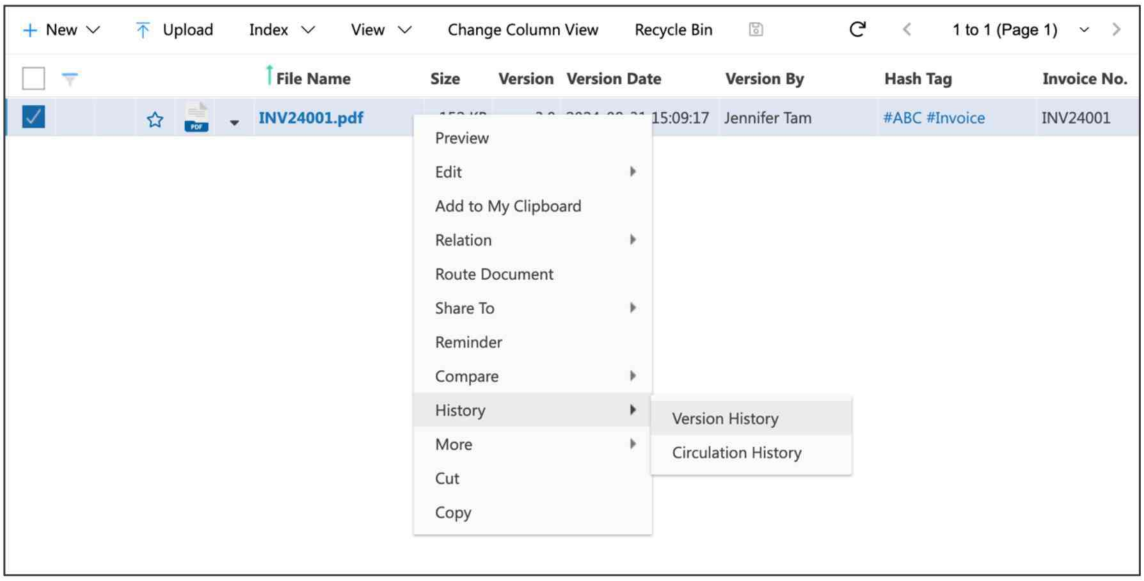
3. If you want to discard any changes, select Unlock instead.



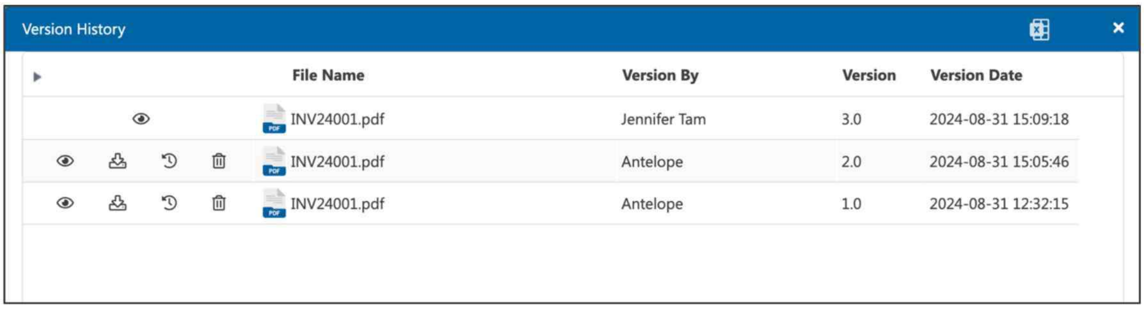
VII. Document Version

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.

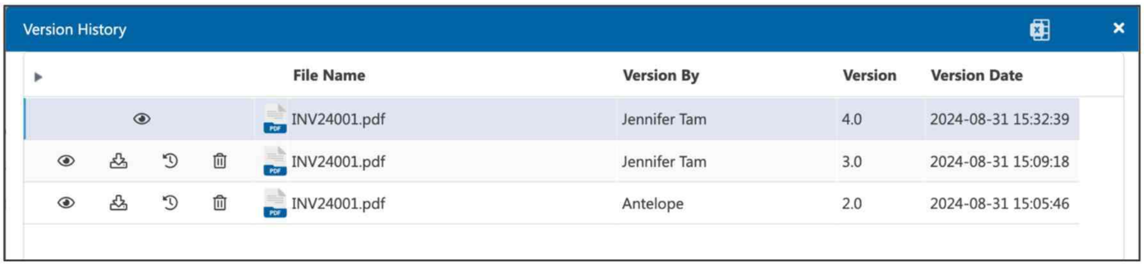


3. The version history window will appear.



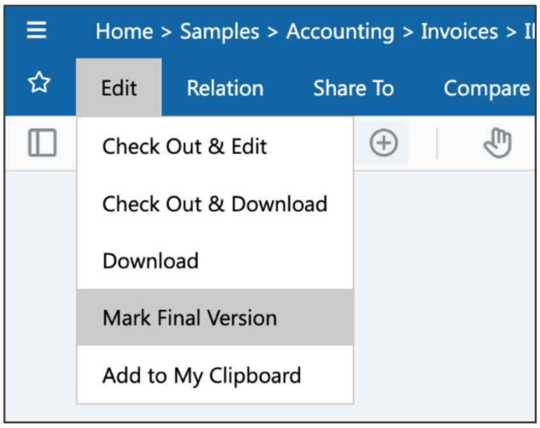
4. Depends on your access permission, you can remove older version of documents by clicking the recycle bine icon.

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

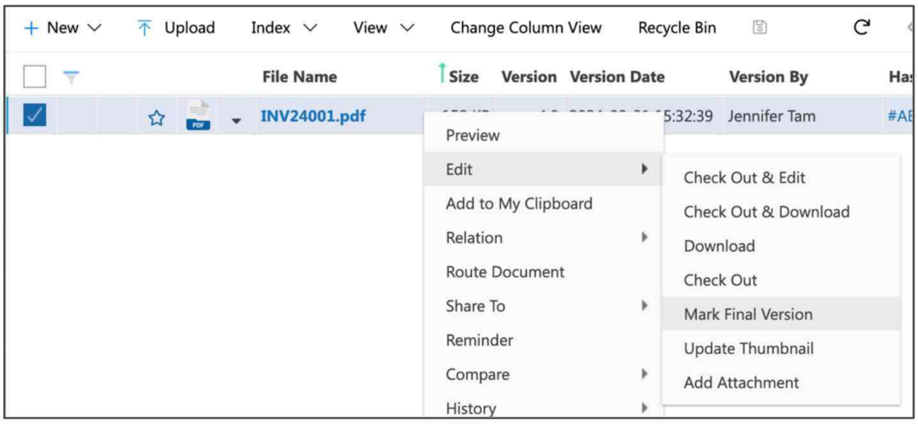


VIII. Mark and Revert Final Version

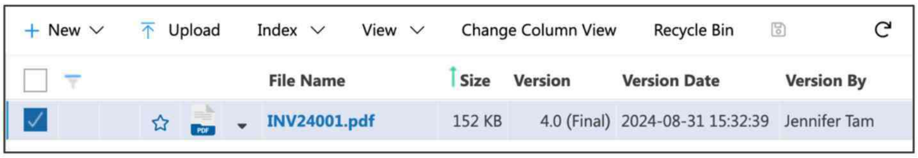
1. To mark a document as final version from further editing, from the document viewer toolbar, select Edit > Mark Final Version.



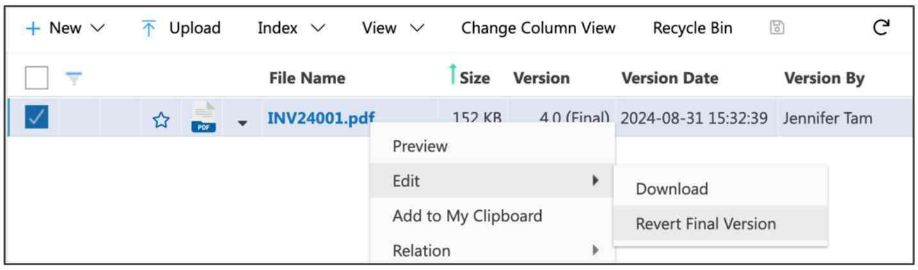
2. You can also mark as final version by bring up the context menu, select Edit > Mark Final Version.



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

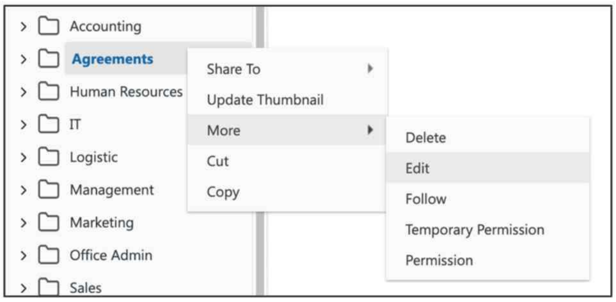


4. User with only manage rights or the document owner can revert the final version back to edit mode.

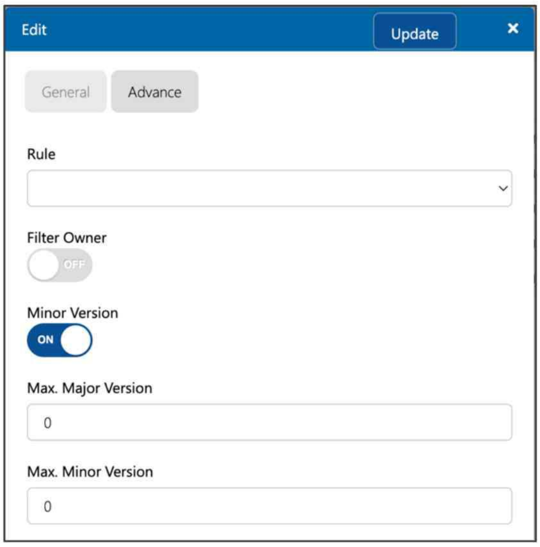


IX. Minor Version Update

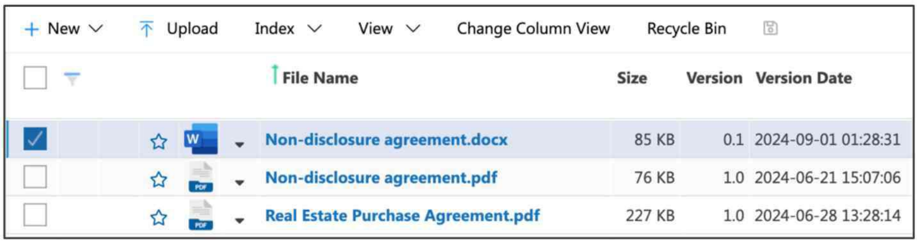
1. To enable minor version of document, select a folder, right click to bring up the context menu, then select “Edit”.



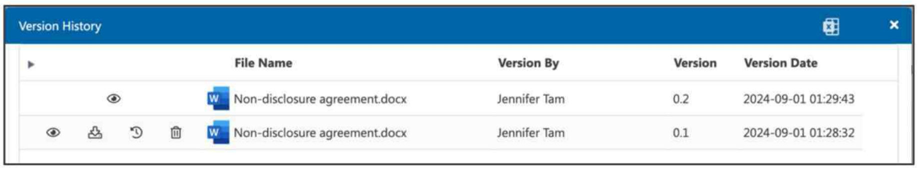
2. Enable minor version, then click the blue “Update” button to save changes.



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



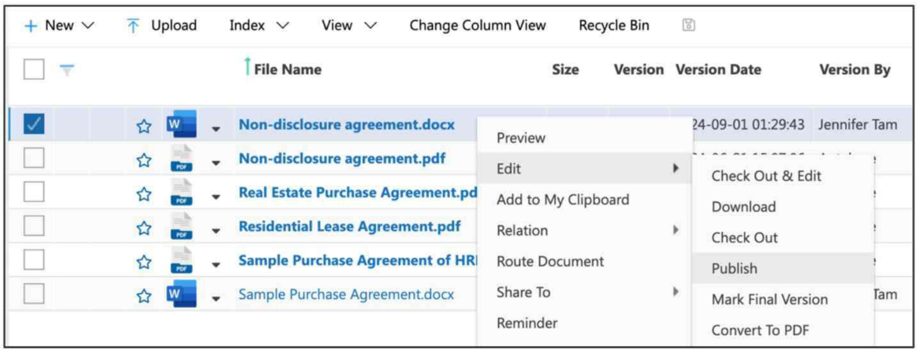
4. Whenever there are any changes, the version number will increment by 0.1.



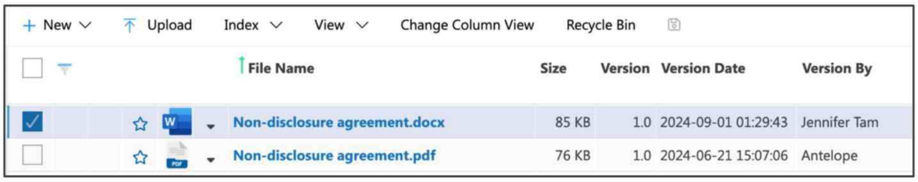
Note: User accounts without “manage” permission on the folder are not able to see the minor version of any documents, except the document owner himself/herself.

X. Publish Version

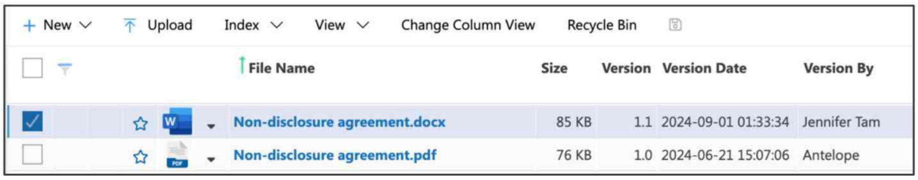
1. To public a minor version of document as major version, select the document, right click to bring up the context menu, then select “Edit > Publish”.



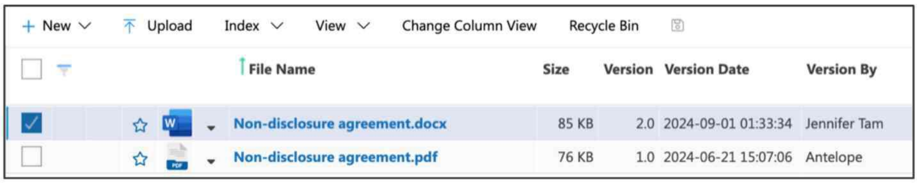
2. Once the document is published, the version number will become 1.0.



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



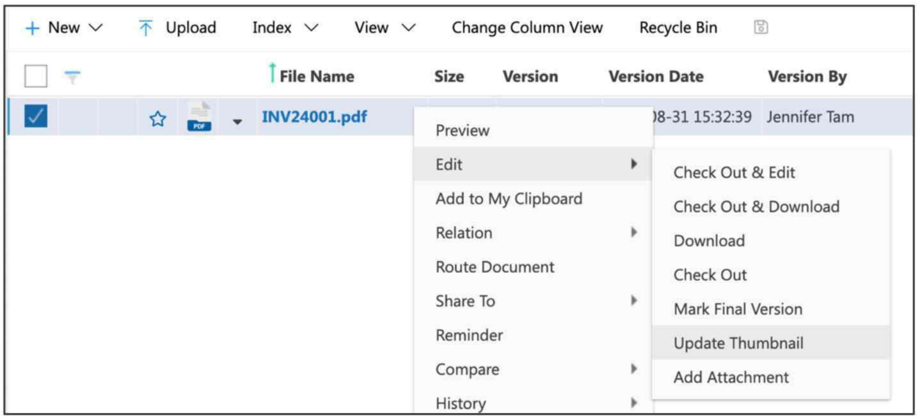
4. Until the document is published to major version.



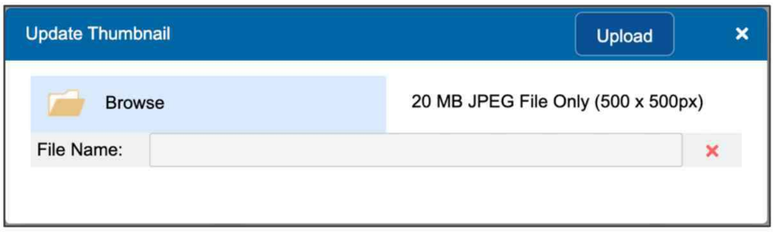
XI. Update Thumbnail

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.

2. Select the document from the document list, right click the bring up the context menu. Select Edit > Update Thumbnail.



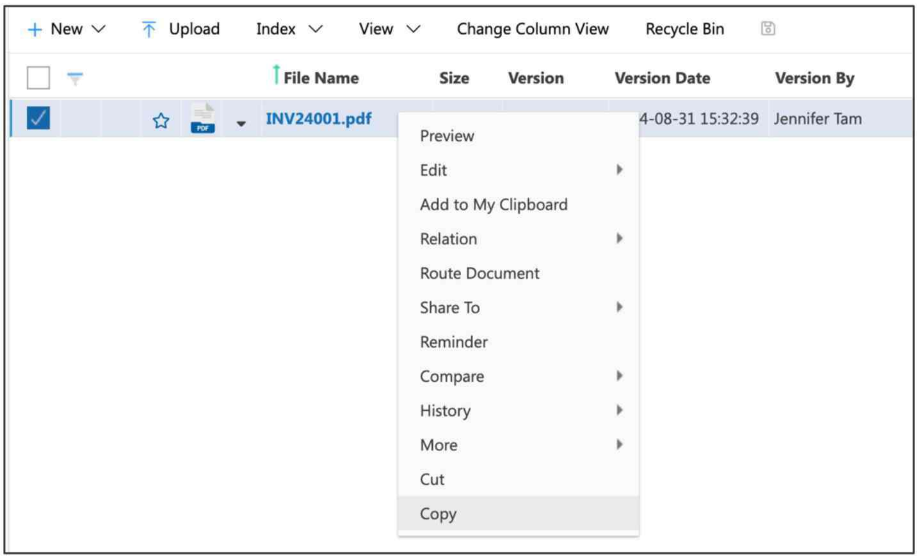
3. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click “Upload” button.



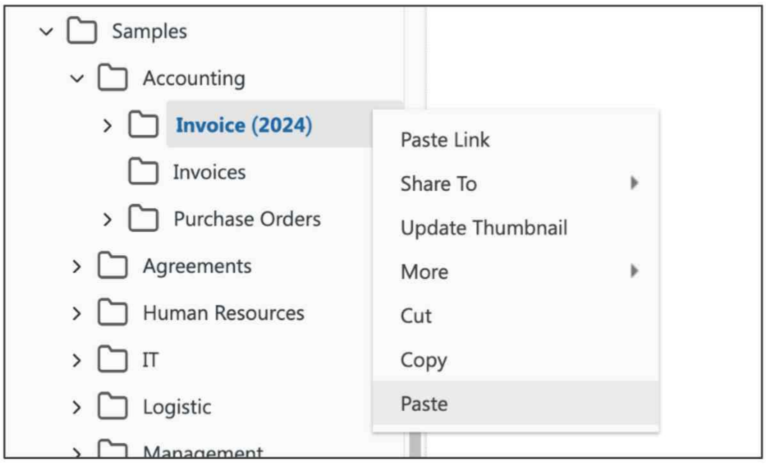
4. Click the blue Upload button to commit changes.

XII. Copy Document

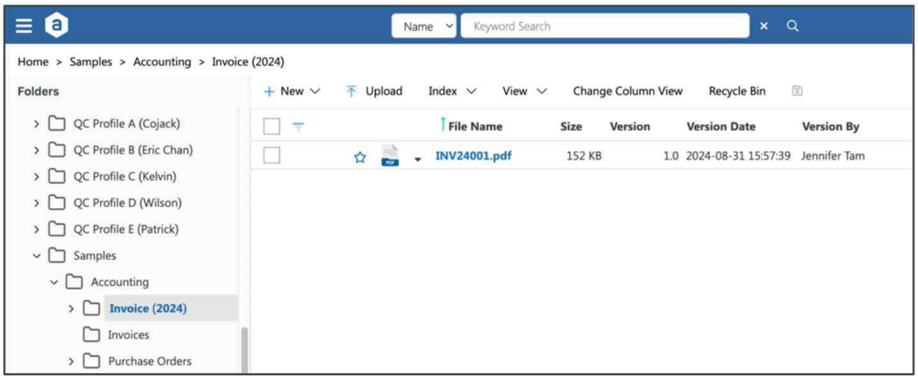
1. To copy a document, select the document from the document list, right click to bring up the context menu, select Copy.



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

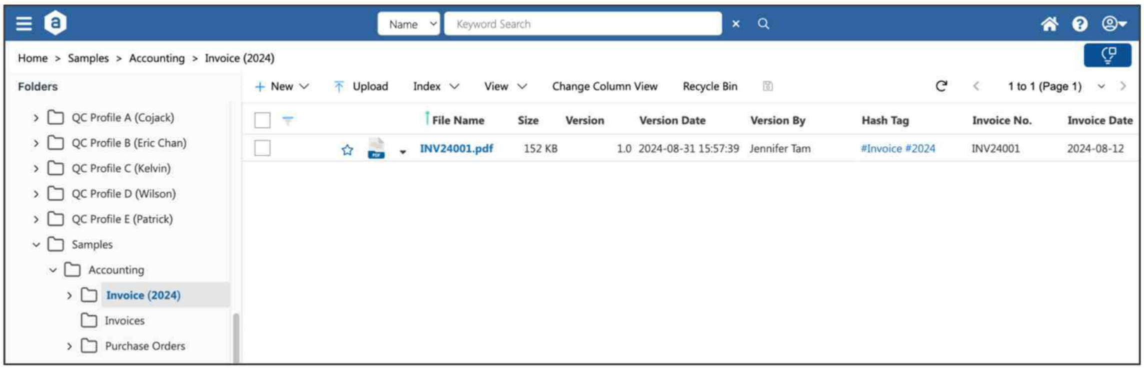


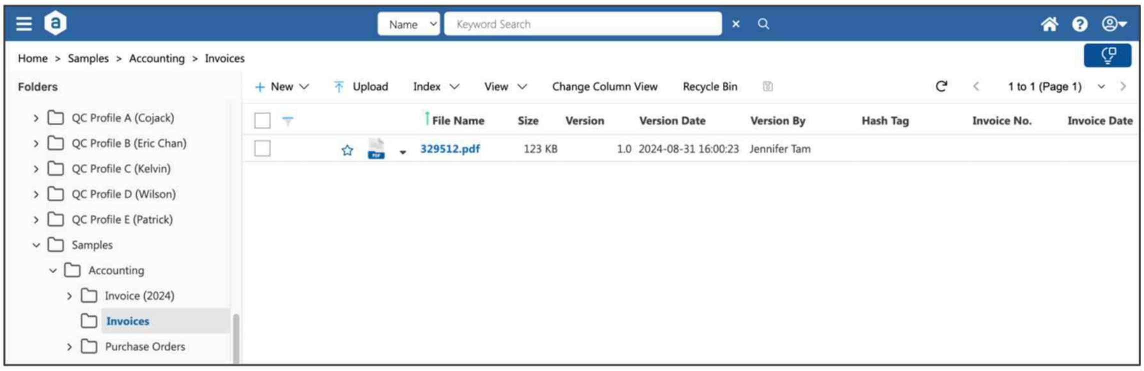
3. Both the document and index are pasted in the destination folder. Be notice that only the latest version will be copied and pasted.



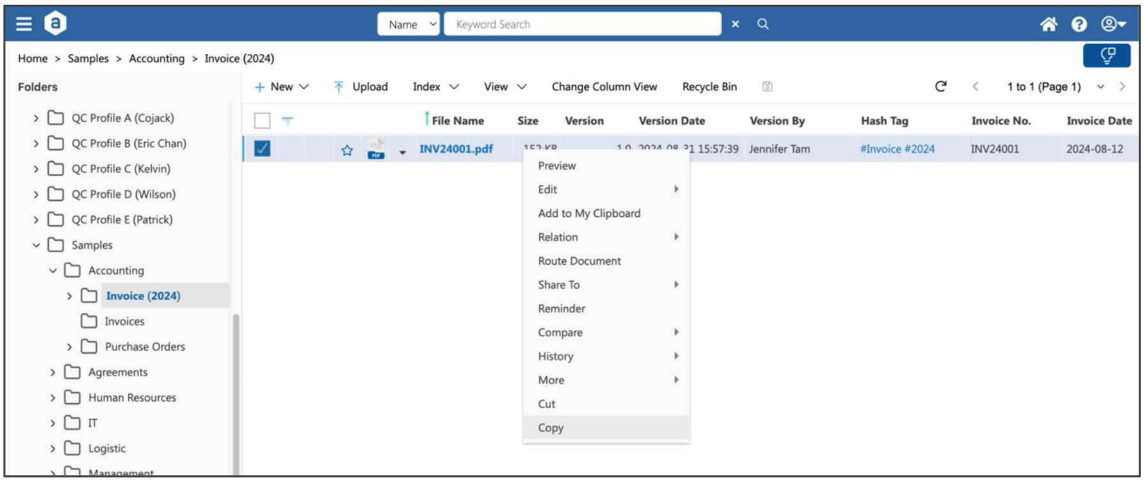
XIII. Copy and Paste Index

1. 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.

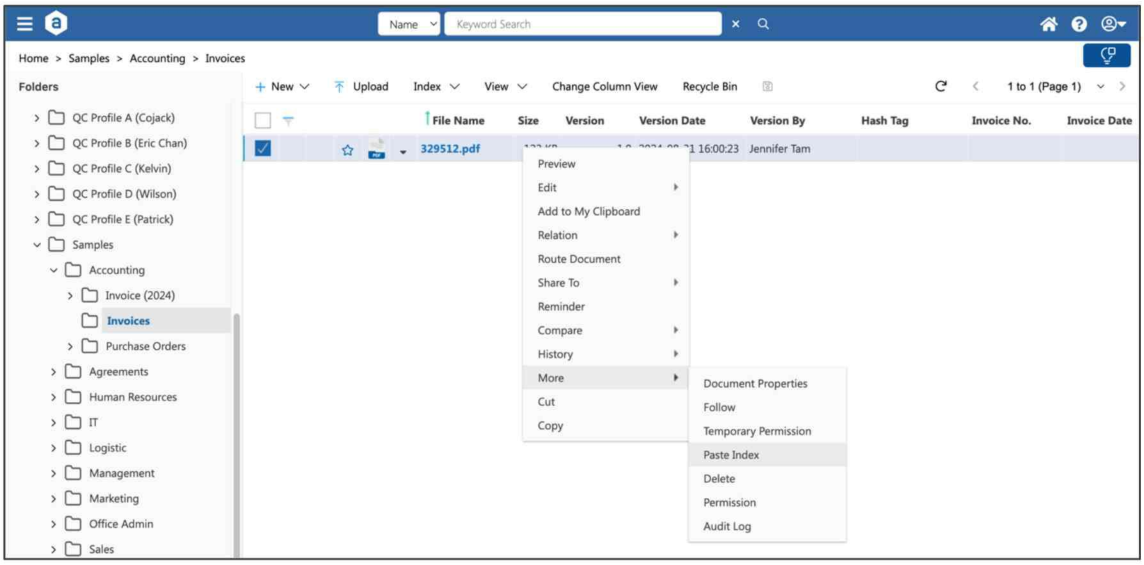




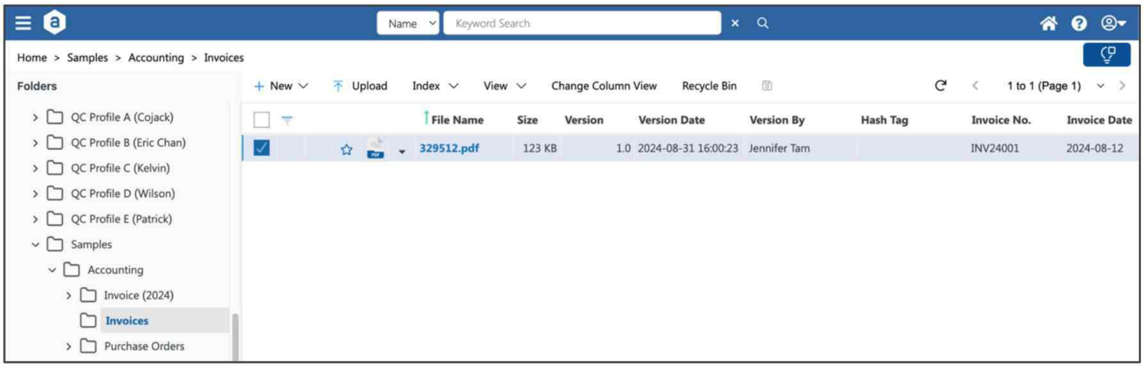
2. Copy the source document.



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

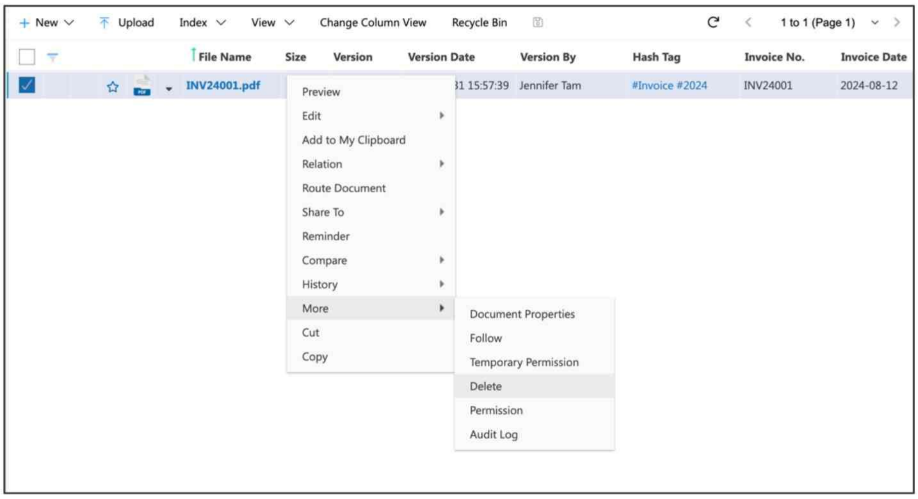


4. The destination document is now indexed with the original one.



XIV.Delete Document

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



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

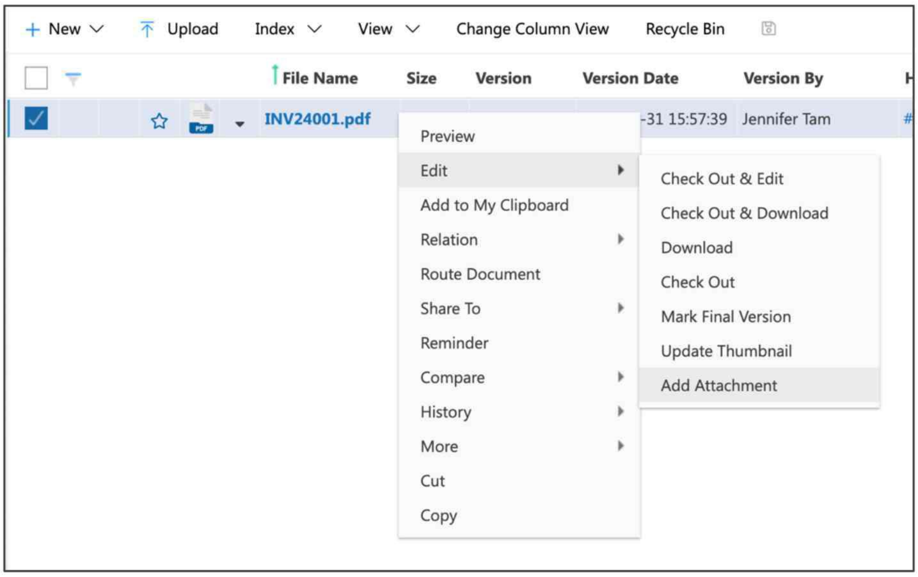
XV. Move Document

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).

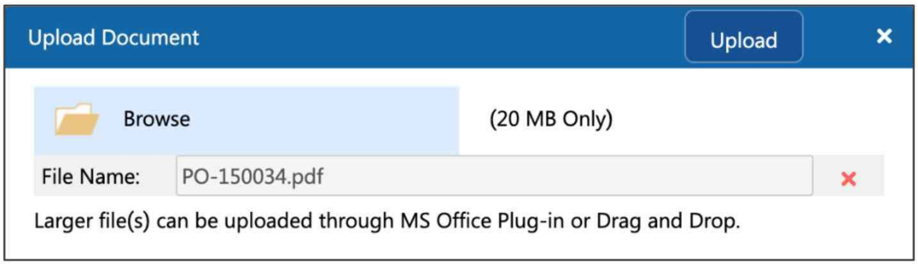
2. If the document profile between the source and destination folders are difference, some document index may not be able to inherit.

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.



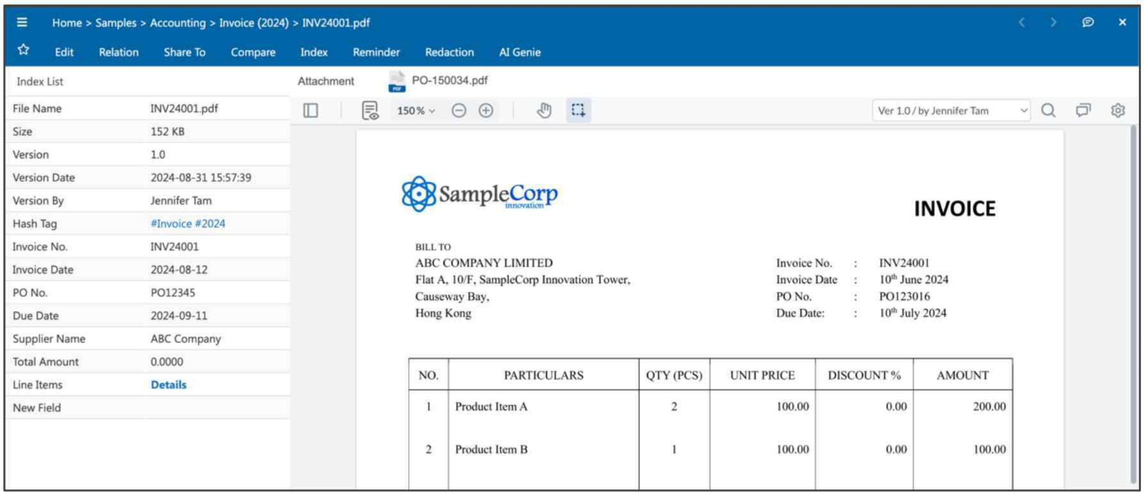
2. Browse the file to upload.



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

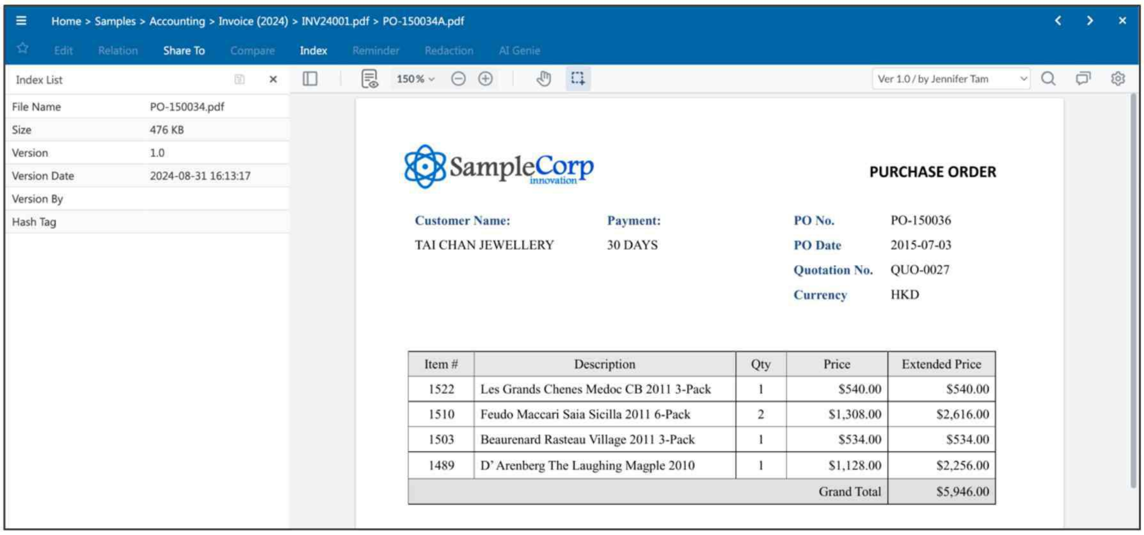
XVII. View Attachment

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



2. The attachment is display above the annotation toolbar.

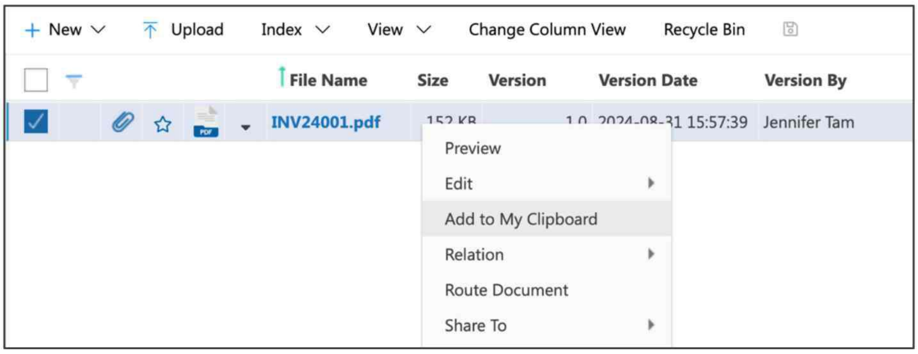
3. Click the attachment name to open for preview.



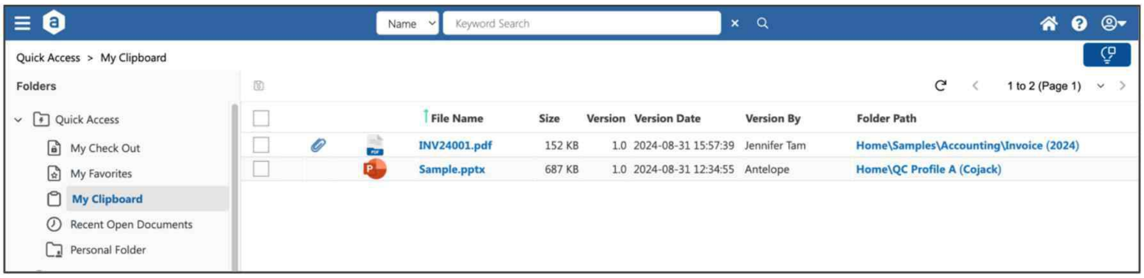
Note: You can only share and rename attachment.

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".



2. You can add multiple documents to clipboard.

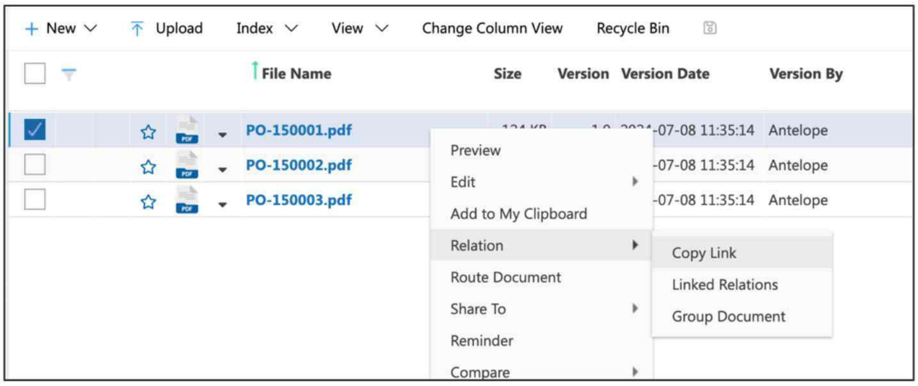


Note: My Clipboard only stores documents temporarily, like search history. It will be cleared once you refresh your page or log out.

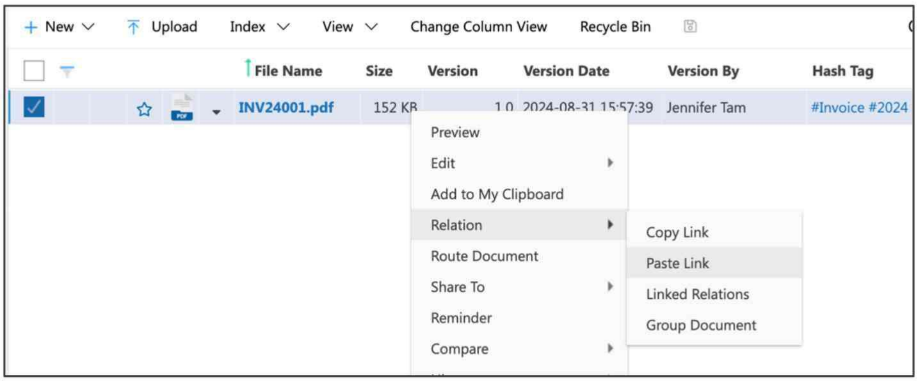
O. Document Relation

I. Copy Link

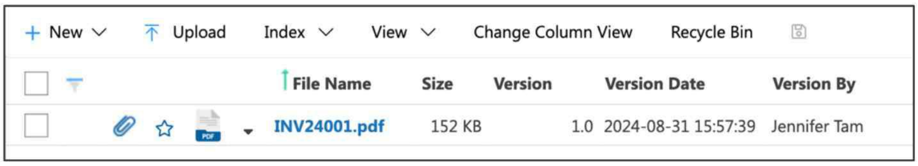
1. To link up two documents, you can use the document link features. For example, if you want to establish a link which “connect” a purchase order to an invoice, select “Relation > Copy Link” from the context menu.



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

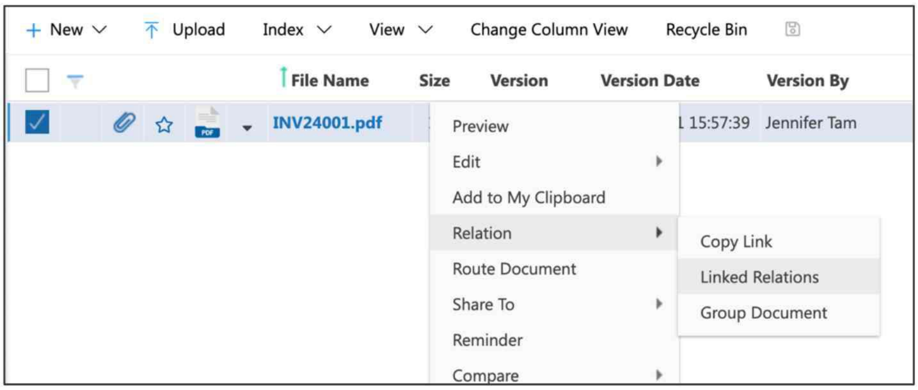


3. A virtual link is established.

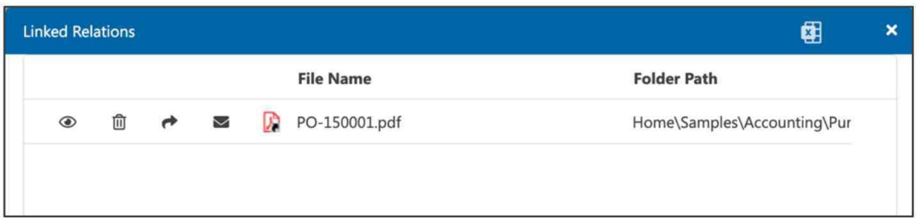


II. Link Relation

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



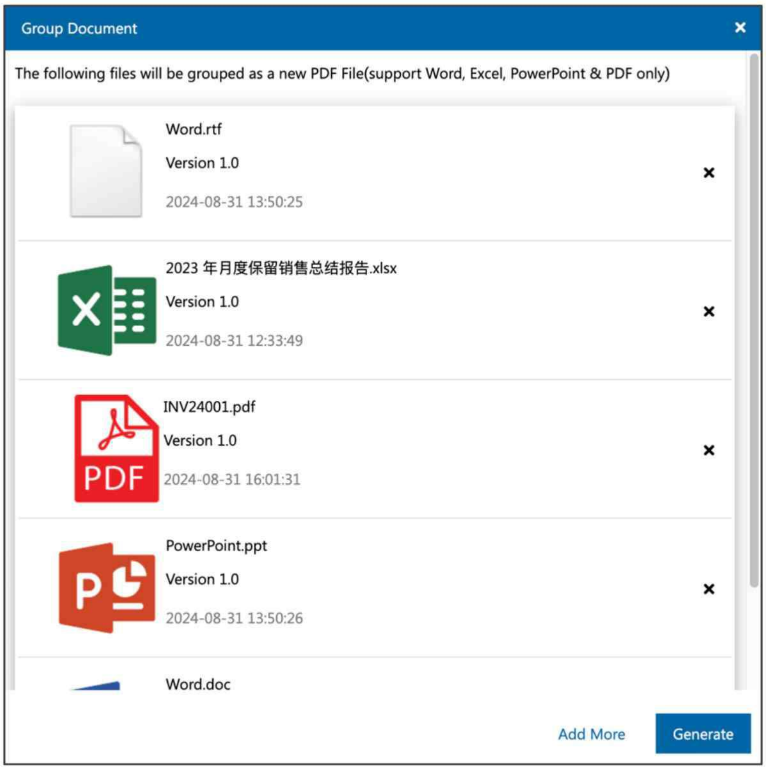
2. The Linked Relations window display all virtual linkage to the document. You can preview, shared and delete the linkage.



III. Group Document

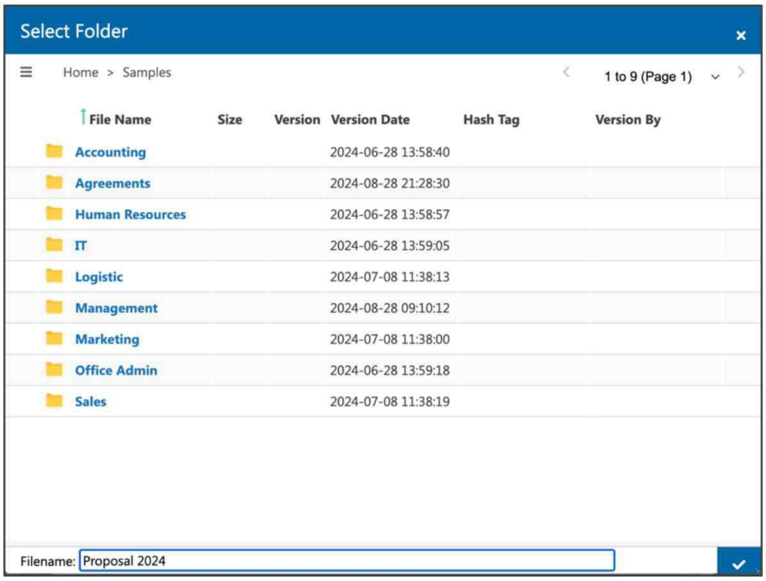
1. You can group multiple document type into a single PDF file by Group Document. This feature only support DOC, DOCX, XLS, XLSX, PPT, PPTX, RTF and PDF format.

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

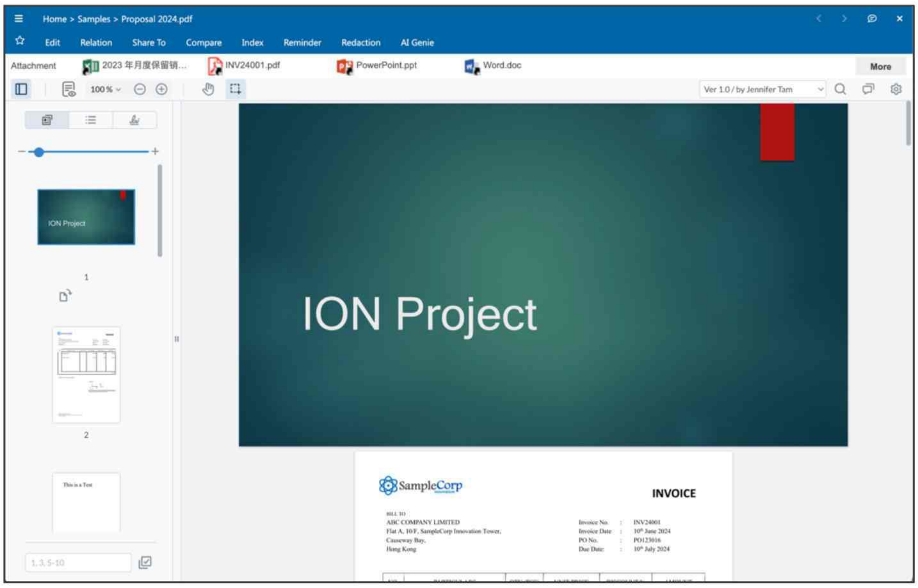


3. Rearrange the document sequence to group, then click the blue “Generate” button.

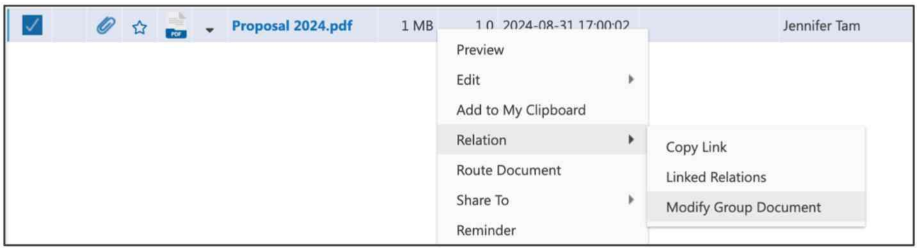
4. Select the destination folder and input a document name, click the “tick” button to save.



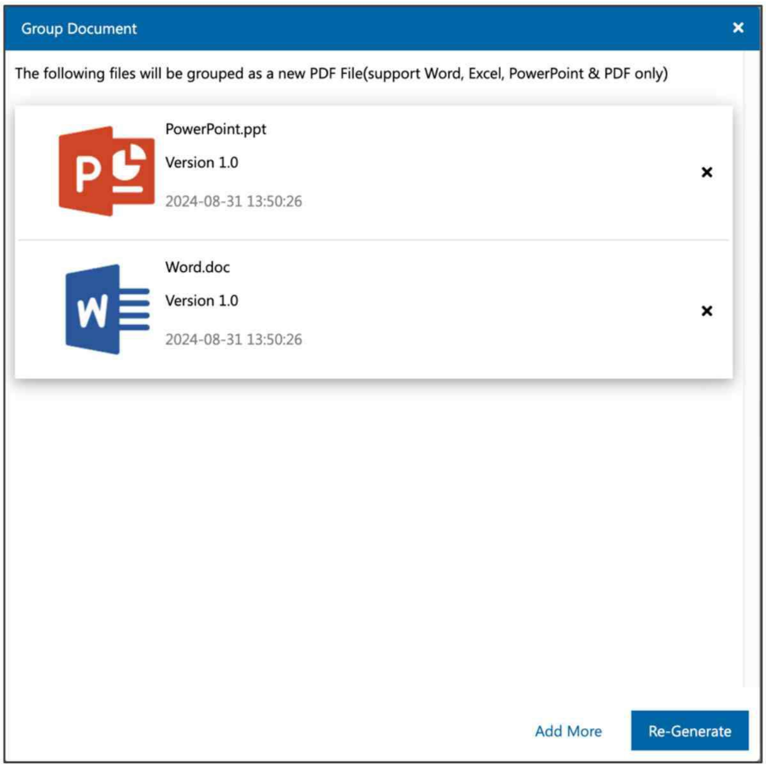
5. Once the document is generated, you can preview the document with thumbnail enabled. All “component documents” are displayed as virtual linkage.



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



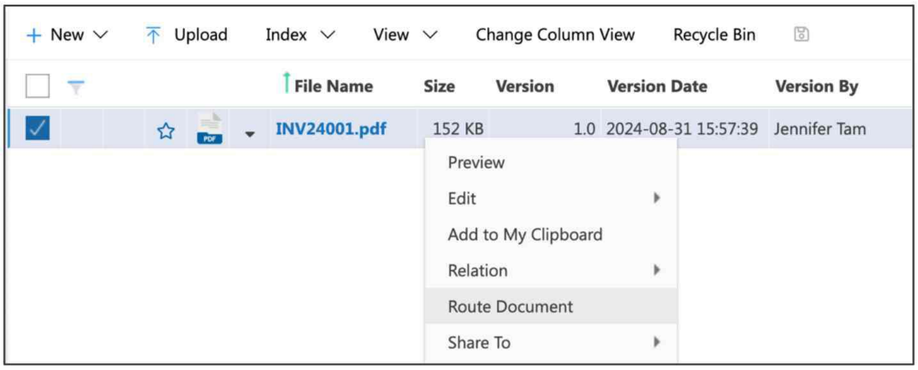
7. In this case, we removed the Excel spreadsheet, RTF file and the PDF. Finally click the blue “Re-Generate” button.



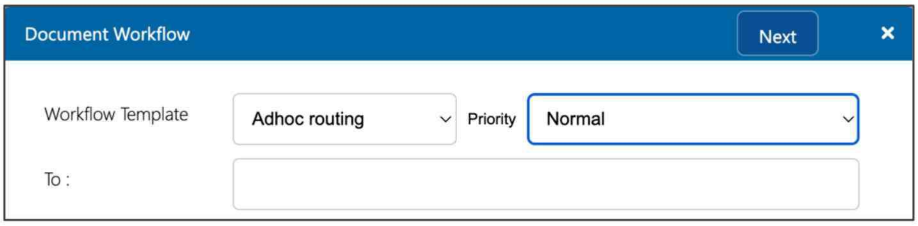
P. Route Document

I. Create New Routing

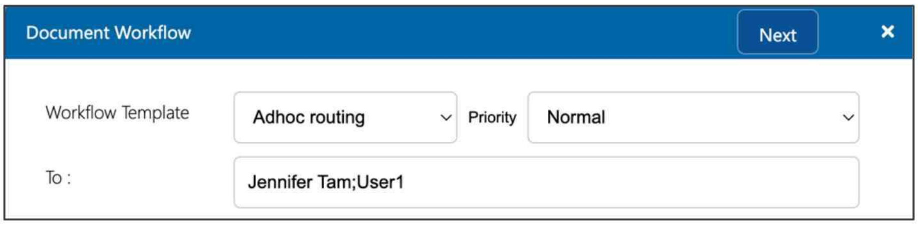
1. You can route a document for single-step approval or review without setting up a workflow diagram. Select "Route Document" from the context menu.



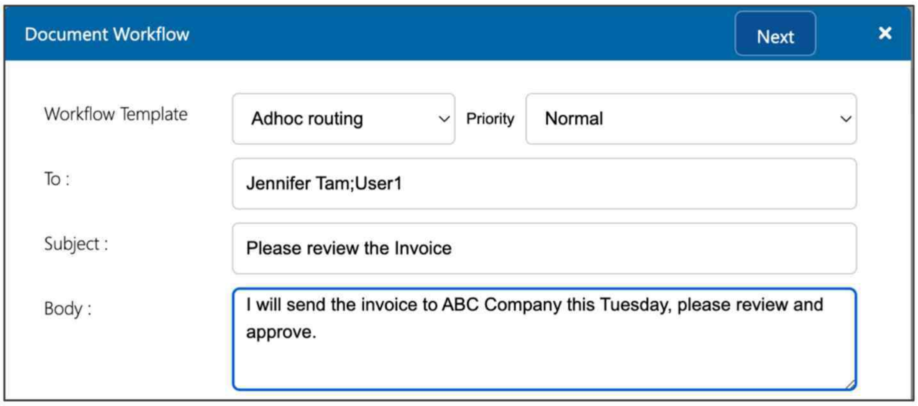
2. The Route Document window will appear. Select the priority with either Low, Normal, High or Top.



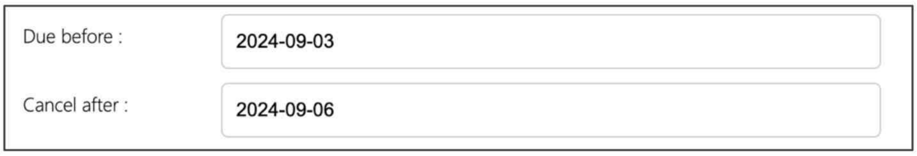
3. Select the recipient(s) either by user account or user group.



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.



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.

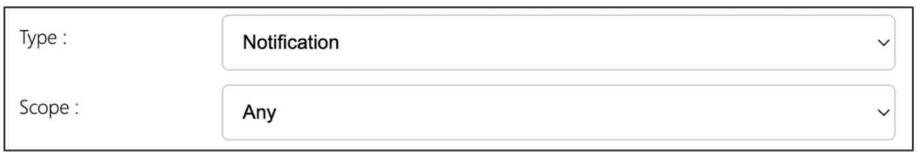


6. There are several types of action for routing.

Type	Description	Action Buttons
Collaborate	When the recipient receives this request, they can make changes on the documents or place annotation, send back to the originator to and fro. Until the originator confirmed completed.	Reply, 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.

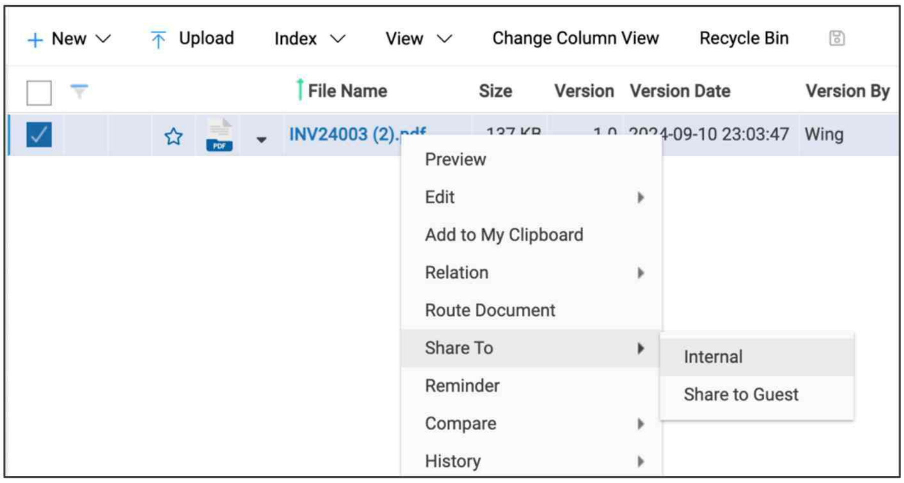


8. In case you want the recipient to receive the document as attachment in the email notification, please check on this option. Bear in mind if the document size is over a certain limit, the recipient email server may not be able to receive.

Q. Sharing

I. Share to Internal

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



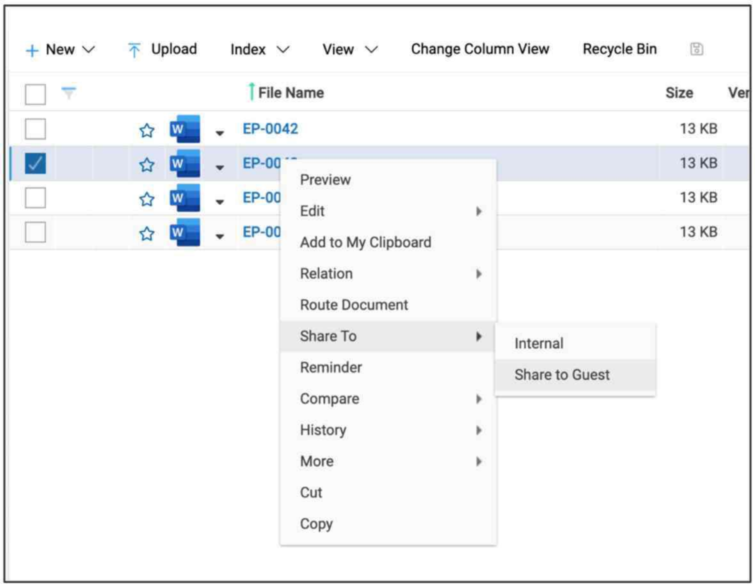
2. Your default email client will bring up with the document link being pasted in the email body, for example:

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

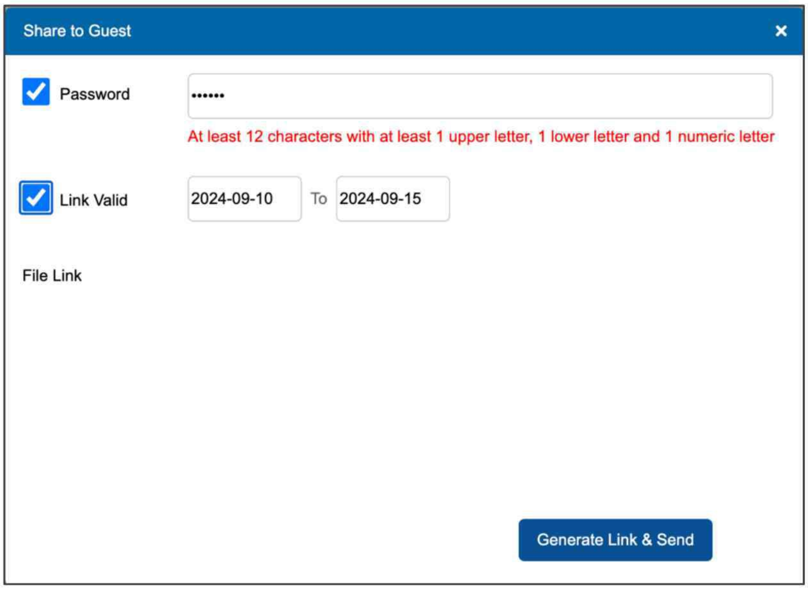
3. Bear in mind user account without access permission cannot access the document content even with the document link.

II. Share to Guest

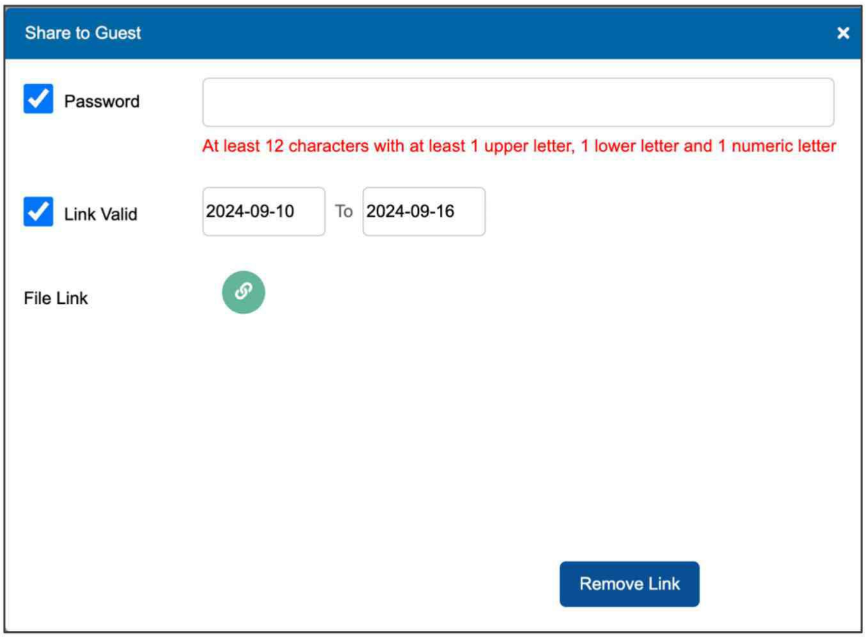
1. To share a document link to guest, select “Share To > Share to Guest”.



2. 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.



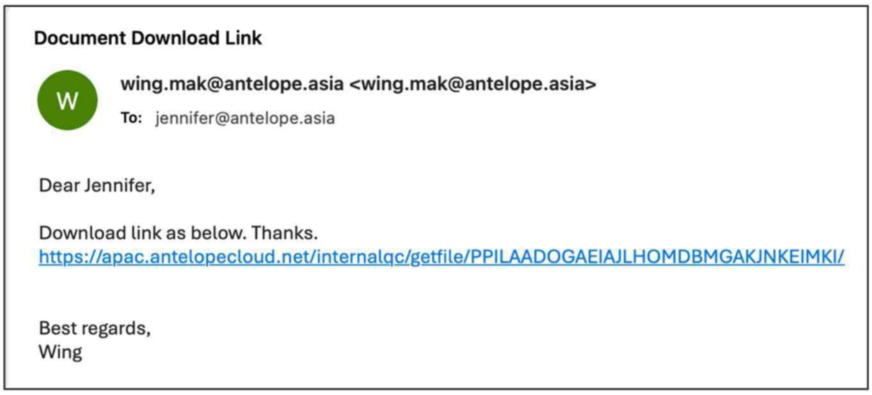
3. Once the document link is generated, you can copy the link by clicking the icon.



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

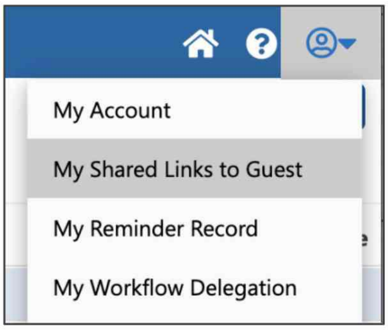
   Noted: Unlike Share to Internal, the external share link to guest only shares the "current version" of document. In case there is a newer version of document published, you are required to generate a new share link again.

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



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"

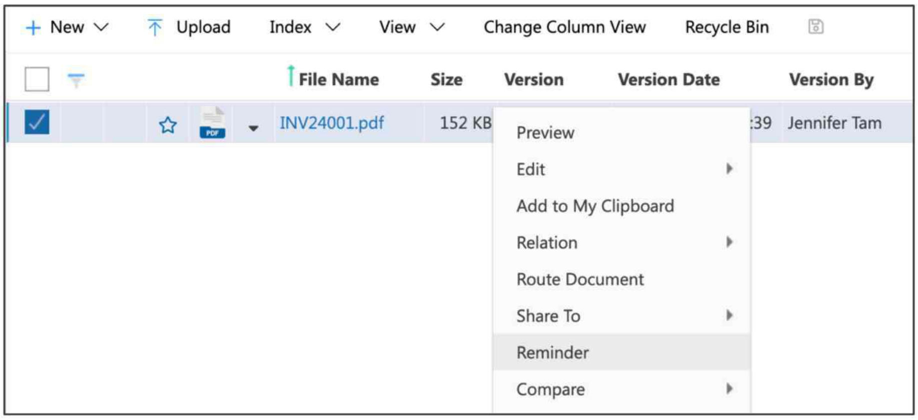


2. You can copy or remove the shared link at any time.

R. Reminder

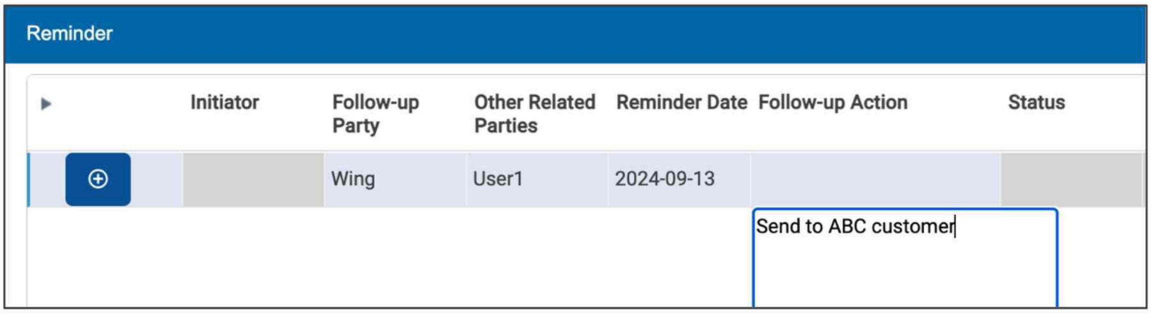
I. Create New Reminder

1. To create reminder schedule, select "Reminder" from the context menu.



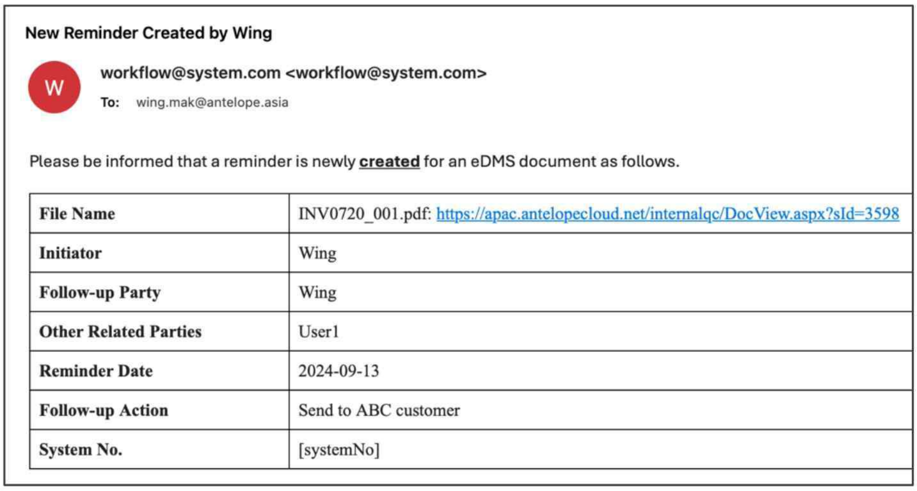
2. The Reminder window will appear.

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



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.



New Reminder Created by Wing

workflow@system.com <workflow@system.com>

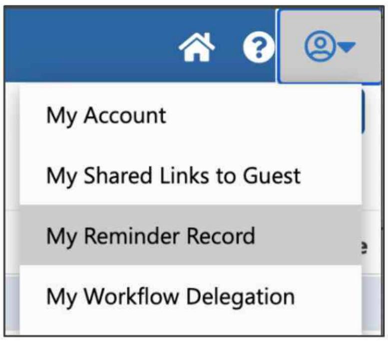
To: wing.mak@antelope.asia

Please be informed that a reminder is newly **created** for an eDMS document as follows.

File Name	INV0720_001.pdf: https://apac.antelopecloud.net/internalqc/DocView.aspx?sId=3598
Initiator	Wing
Follow-up Party	Wing
Other Related Parties	User1
Reminder Date	2024-09-13
Follow-up Action	Send to ABC customer
System No.	[systemNo]

II. My Reminder Record

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



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

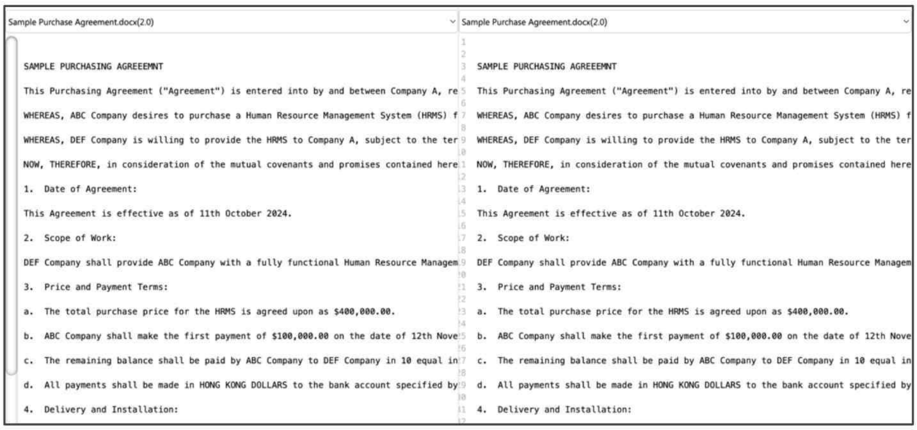
3. To delete the reminder, click the recycle bin icon.

S. Compare

I. Text Compare

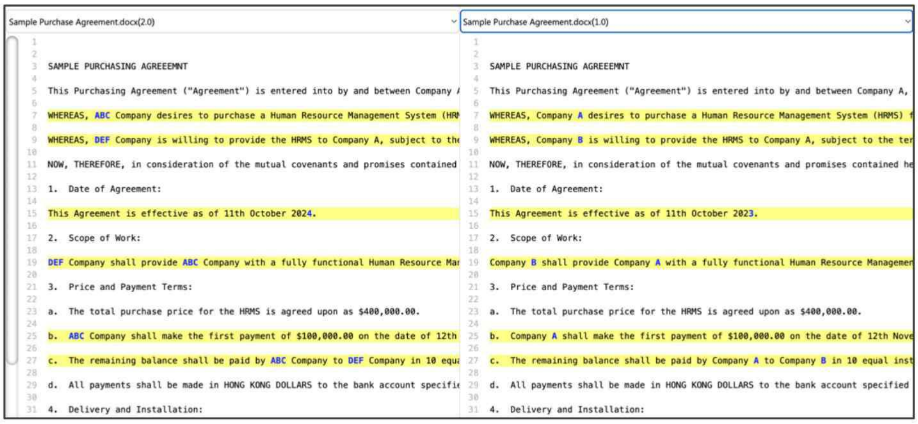
1. To compare two documents in plain text mode, select “Compare > Text Compare”.

2. A two-sided document viewer will appear.



3. Select different versions on both sides.

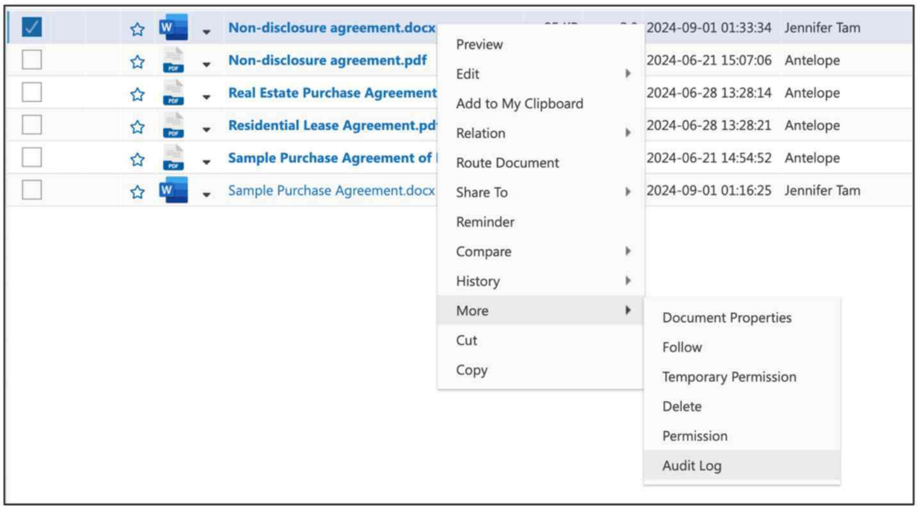
4. The documents will highlight for any difference between the two versions.



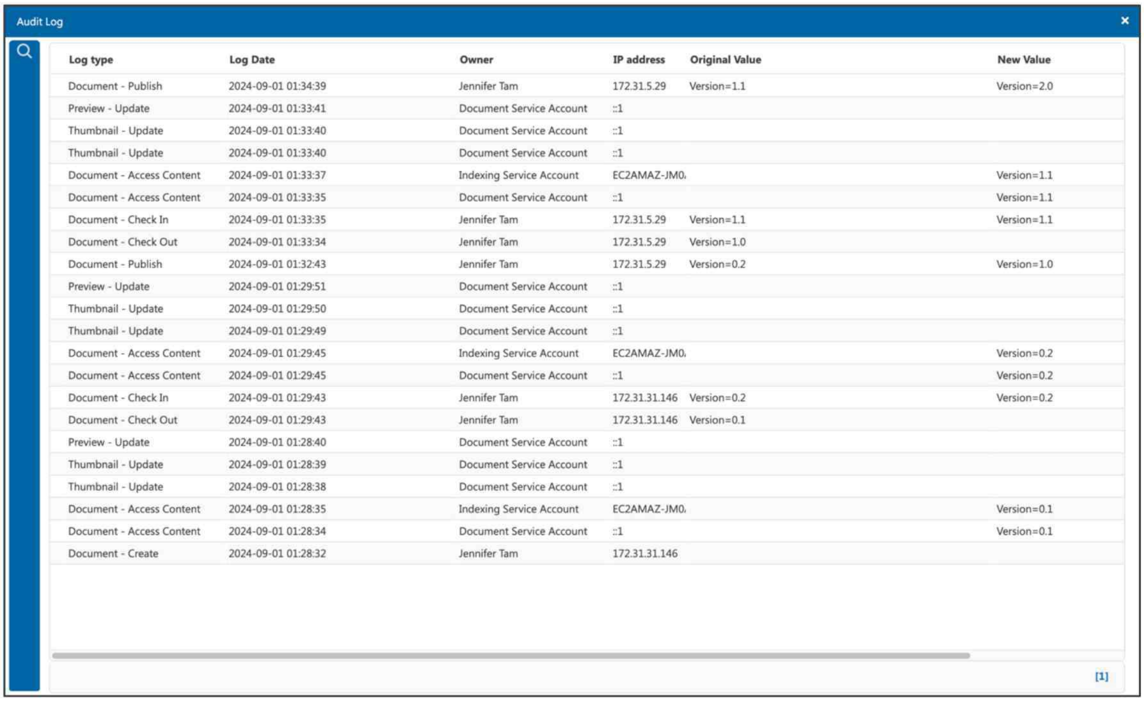
T. Document Audit Log

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”.

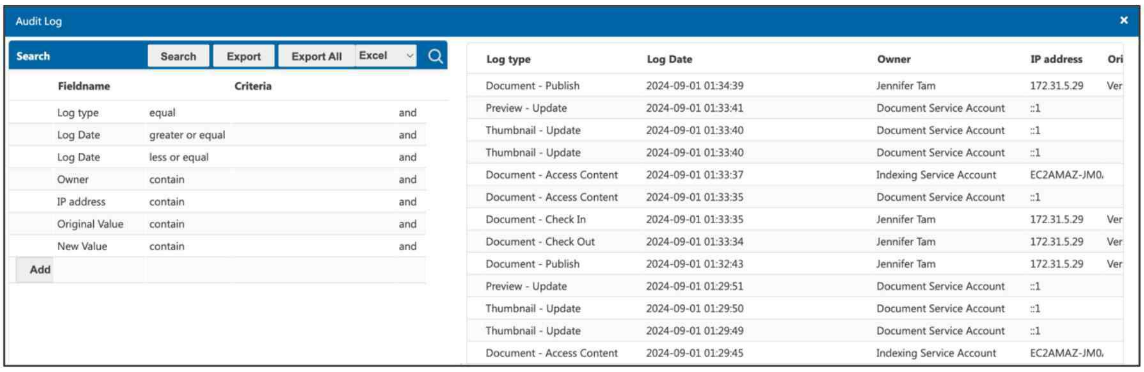


2. The document audit log window will appear.

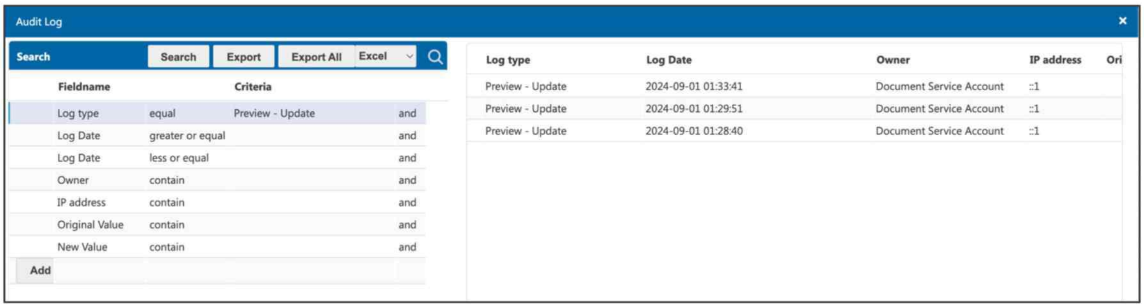


3. The audit log contains information including log type, log date, document owner, IP address, original value and new value.

4. To search the document audit log, click the search icon to bring up the search panel on the left-hand side.



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



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

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