



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

A.	Login & Authentication	7
I.	Login	7
II.	Forget Password	8
B.	My Account	9
I.	Avatar	9
II.	Password	10
III.	Signature	10
C.	Dashboard	12
I.	Dashboard mode and web part introduction	12
II.	Edit the dashboard	14
III.	Add a new web part	16
IV.	Delete an existing web part	18
V.	Add a new web part to existing row	19
VI.	Enlarge an existing web part	21
VII.	Rename a web part	24
VIII.	Rename a tab	25
D.	Searching	26
I.	Name Search	26
II.	Full-Text Search	27
III.	Advanced Search	28
IV.	Save Search Template	30
V.	Load Search Template	31
VI.	Delete Search Template	32
E.	Quick Access	33
I.	My Check-Out	33
II.	My Favorites	34
III.	My Clipboard	35
IV.	Recent Open Documents	35
V.	Personal Folder	36
F.	Folder	36

I.	Create New Folder	36
II.	Folder Type	39
III.	Folder Naming by Rule	40
IV.	Filter Owner	40
V.	Major and Minor Version	42
VI.	Maximum Major Version / Maximum Minor Version	42
VII.	Copy Index	43
VIII.	Quota Schema	45
IX.	Edit Folder	46
X.	Share Folder Link to Internal User	46
XI.	Update Folder Thumbnail	48
XII.	Delete Folder	49
G.	Follow	49
I.	Create New Follow	49
II.	Follow Events	51
III.	Tigger by Index Field	52
H.	Permission	54
I.	Assign Permission	54
II.	Break Inherit	56
III.	Restore Inherit	56
I.	Temporary Permission	57
I.	Assign Temporary Permission	57
J.	Recycle Bin	58
I.	Recycle Bin View	58
II.	Folder Recycle Bin	59
K.	Hyperlink	60
I.	Create New Hyperlink	60
II.	Edit Hyperlink	61
III.	Delete Hyperlink	61
L.	Calendar	61
I.	Create New Calendar	61
II.	Create Activity	63

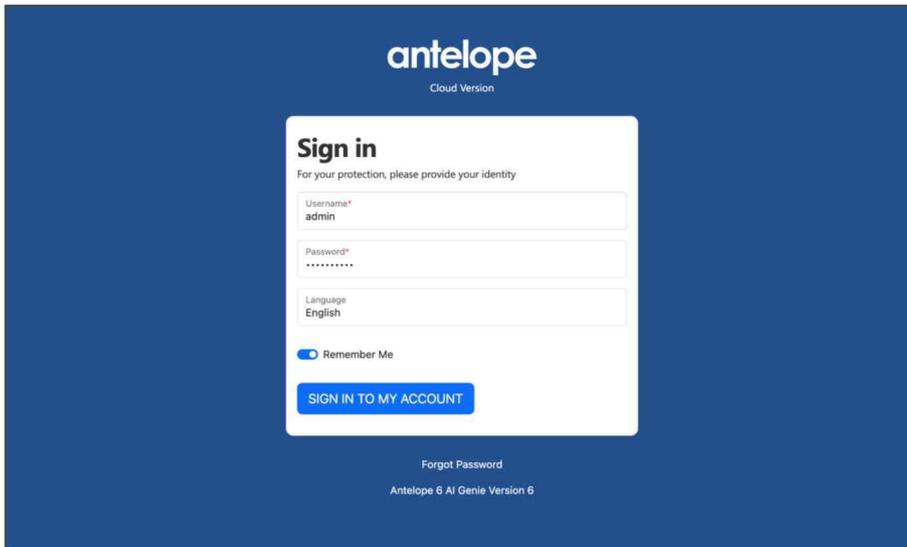
III.	Edit Activity	64
M.	Document List	65
I.	Document List and Thumbnail View	65
II.	Column Filter	65
III.	Export List	66
IV.	Import List	67
V.	Change Column View	67
N.	Document	69
I.	Upload Document	69
II.	Preview Document	70
III.	Index Field	72
IV.	Check-Out and Edit	73
V.	Document Viewer Annotation	74
VI.	Check-In and Unlock Document	78
VII.	Document Version	79
VIII.	Mark and Revert Final Version	81
IX.	Minor Version Update	82
X.	Publish Version	83
XI.	Update Thumbnail	83
XII.	Copy Document	84
XIII.	Copy and Paste Index	85
XIV.	Delete Document	87
XV.	Move Document	87
XVI.	Add Attachment	87
XVII.	View Attachment	89
XVIII.	Add to My Clipboard	89
O.	Document Relation	90
I.	Copy Link	90
II.	Link Relation	91
III.	Group Document	91
P.	Route Document	94
I.	Create New Routing	94

- Q. Sharing..... 96**
 - I. Share to Internal 96**
 - II. Share to Guest 97**
 - III. My Shared Links to External 98**
- R. Reminder..... 99**
 - I. Create New Reminder 99**
 - II. My Reminder Record 100**
- S. Compare..... 101**
 - I. Text Compare 101**
- T. Document Audit Log 102**
 - I. Document Audit Log 102**

A. Login & Authentication

I. Login

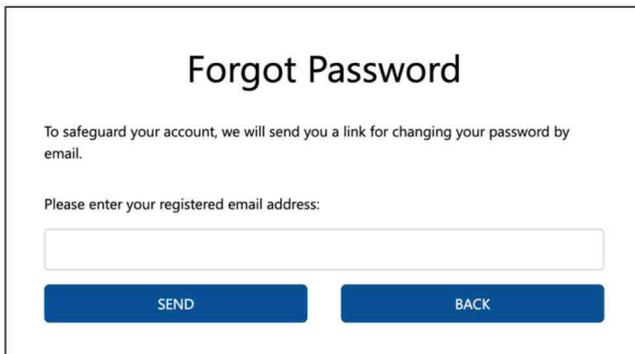
1. Antelope 6 Cloud supports the following types of login authentication:
 - a. Simple username and password input.
2. Input the username and password.



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.



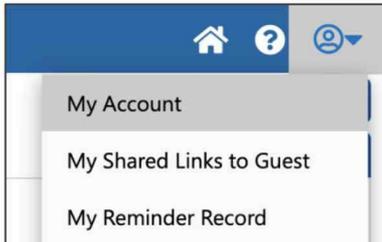
The screenshot shows a web form titled "Forgot Password". Below the title, there is a message: "To safeguard your account, we will send you a link for changing your password by email." Below this message, there is a prompt: "Please enter your registered email address:". Underneath the prompt is a text input field. At the bottom of the form, there are two blue buttons: "SEND" on the left and "BACK" on the right.

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.

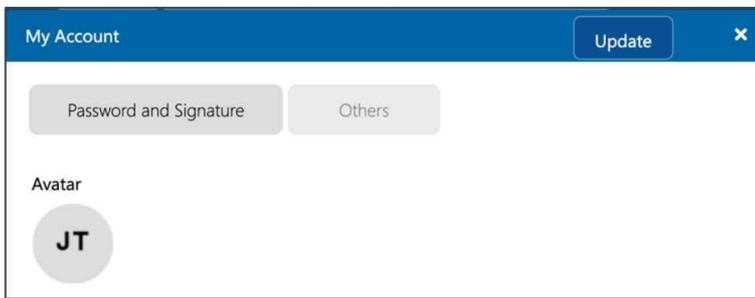
B. My Account

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”.



A form with three input fields. The first field is labeled "Password", the second "New Password", and the third "Confirm Password". Each field is a simple rectangular box with rounded corners.

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.

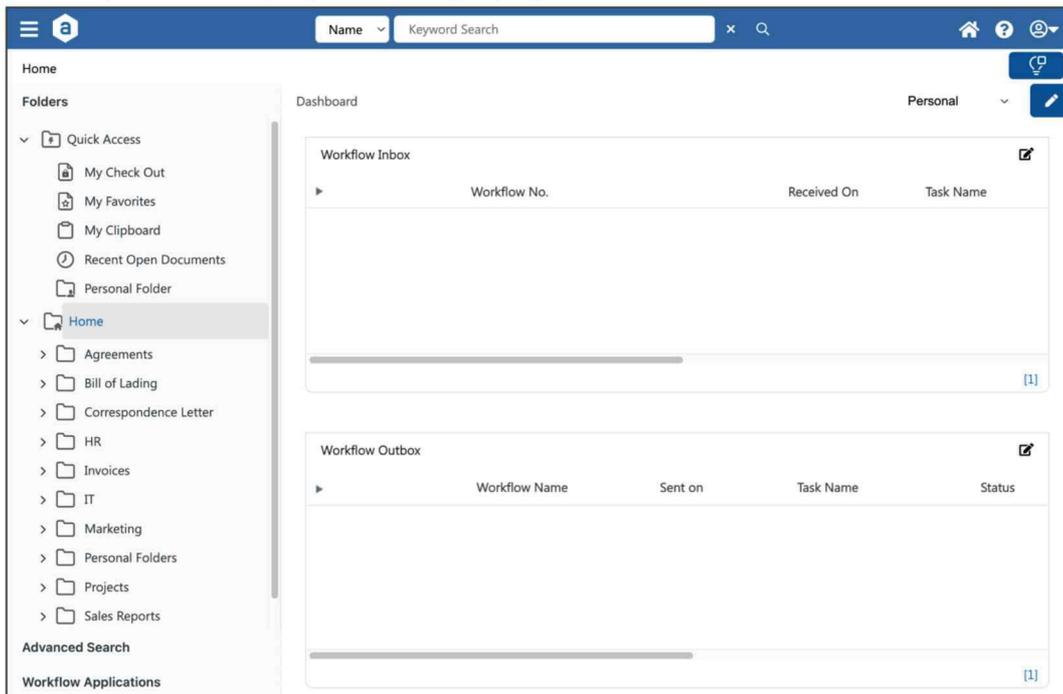
4. Click the “Clear” hyperlink to clear your signature.
5. Click the “Upload” button to save your signature.

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.

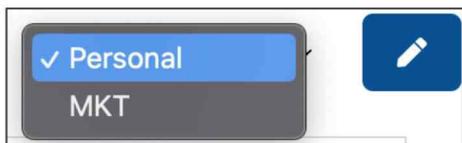
1. If you are the first-time login into the system, you will see two webparts displayed in the dashboard: Workflow Inbox and Workflow Outbox. This is the “Normal” mode, in which all web parts are displayed in a single page.



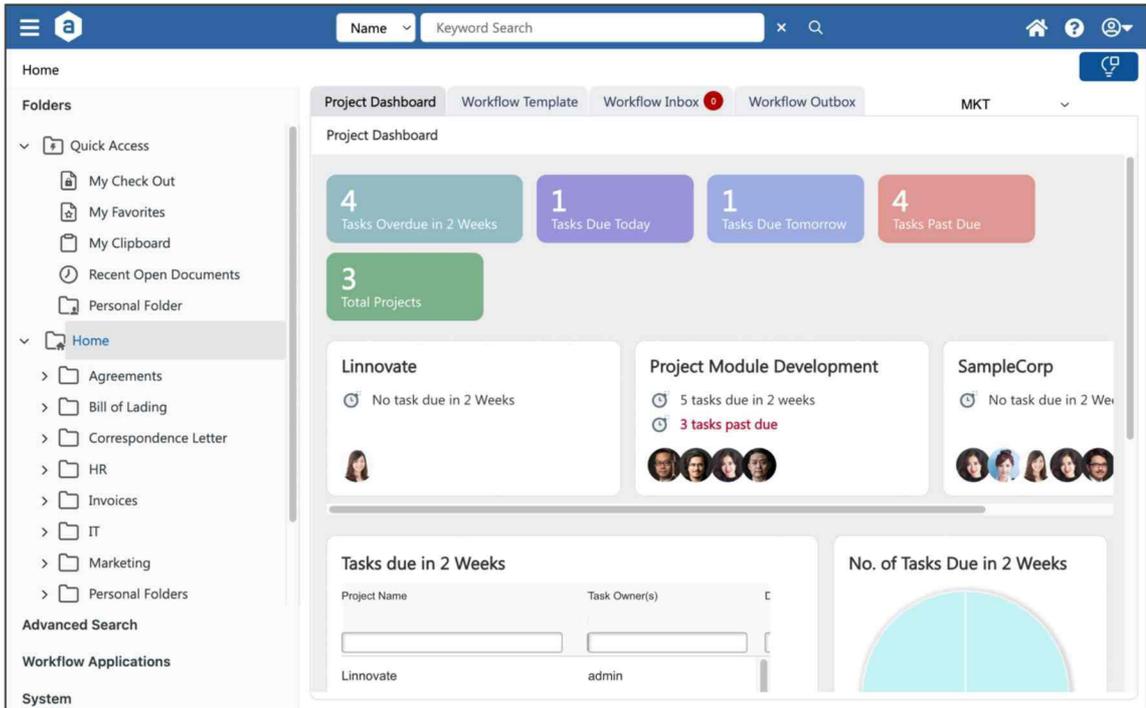
2. At the top right-handed corner, there is a “Personal” pull-down list which allows you to select different dashboards.



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 be able to see the blue edit button on the right-hand side, as below:-



No access permission



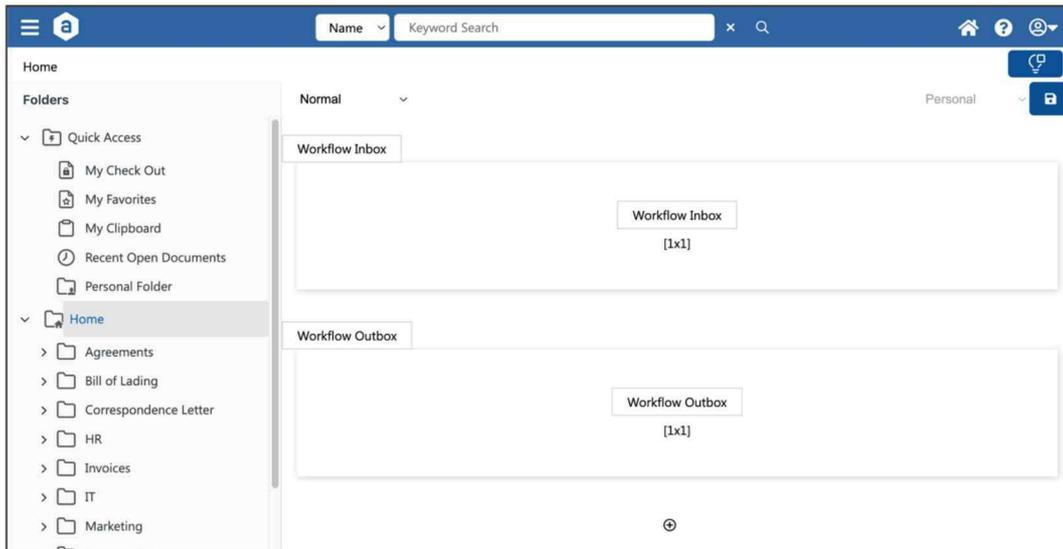
Access permission granted

II. Edit the dashboard

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



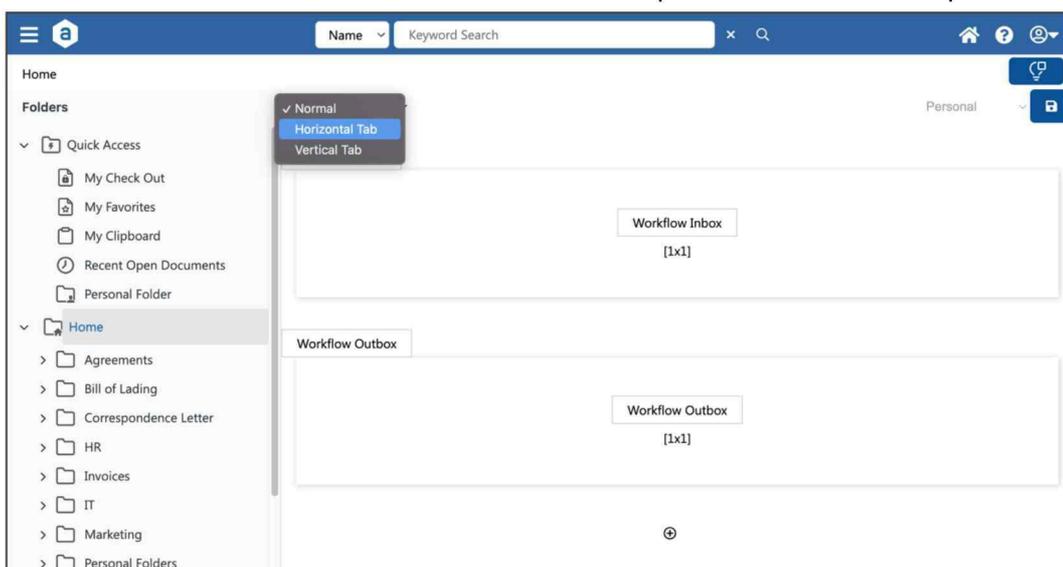
2. Your dashboard will change into edit mode.



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



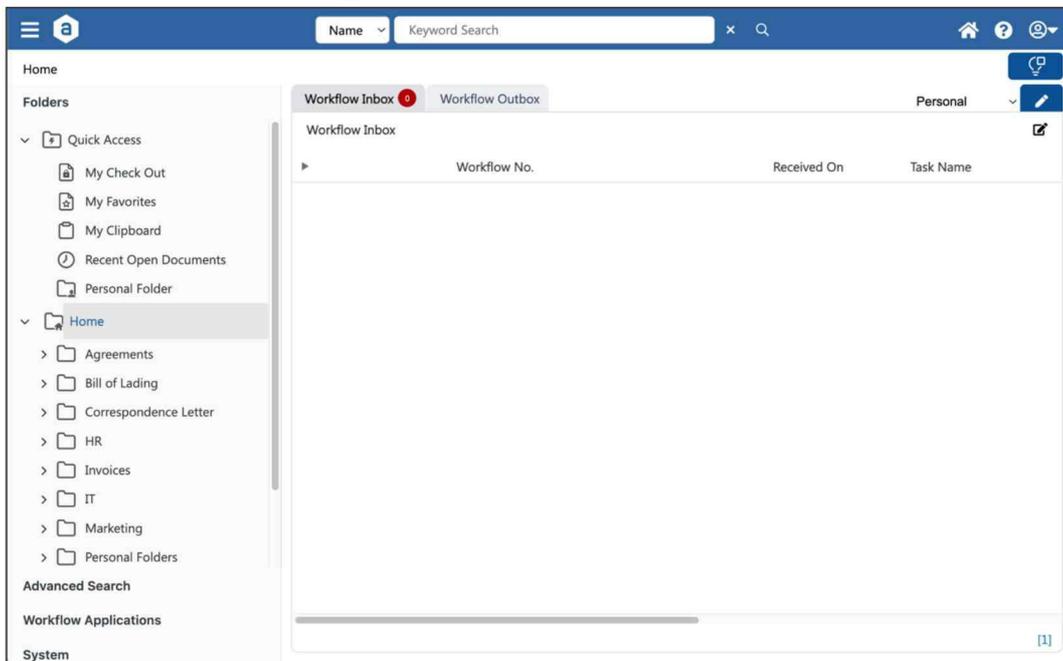
4. There are three dashboard modes for you to select: Normal, Horizontal Tab and Vertical Tab. Select "Horizontal Tab" from the top left-handed corner pull-down list.



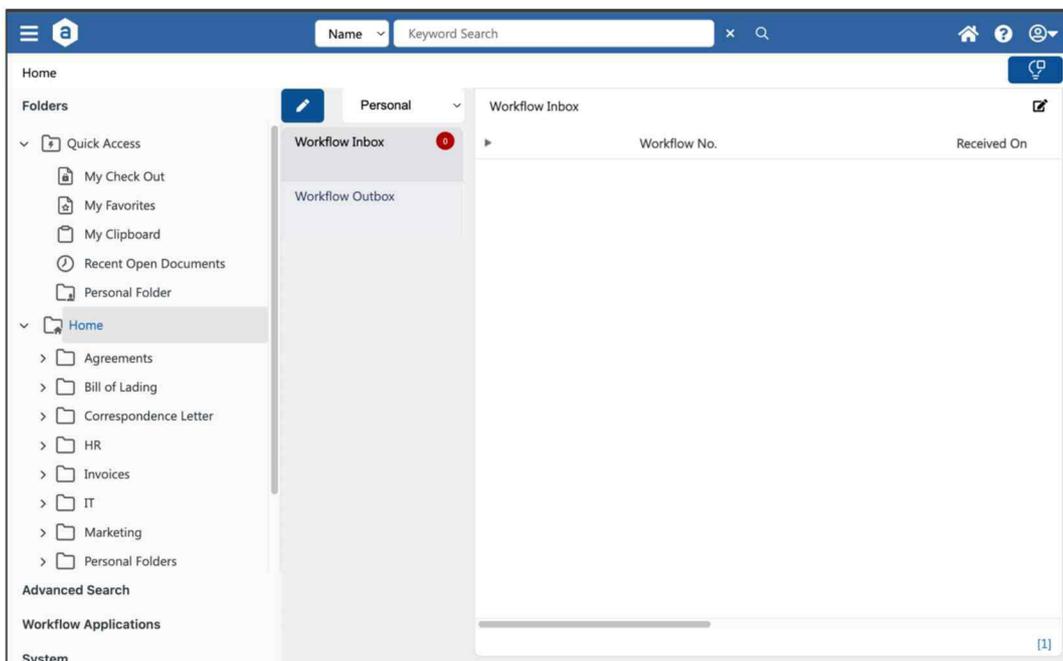
5. Click the blue save button to commit changes.



6. The dashboard will change into horizontal tab mode.

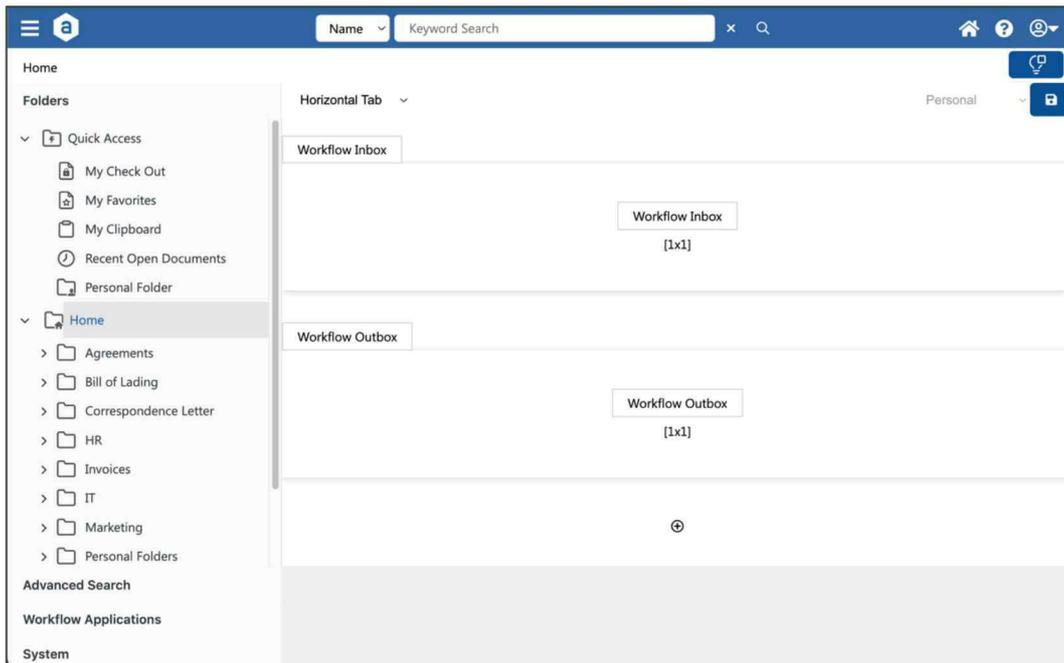


7. For vertical tab mode, all web part tabs will align to the left-handed side of the screen.

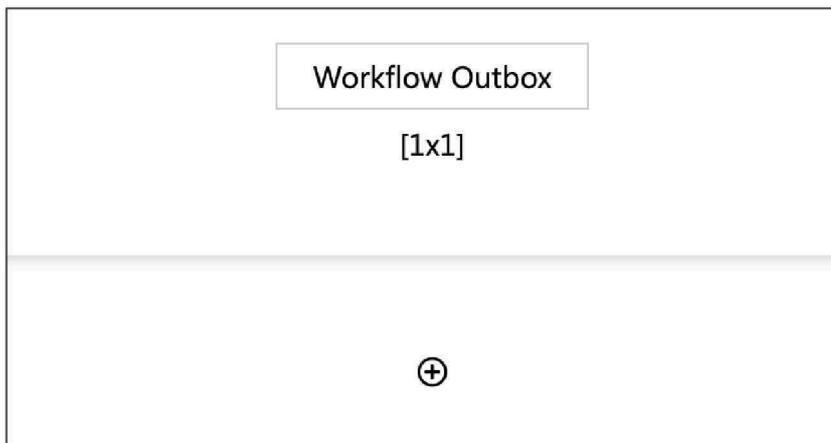


III. Add a new web part

1. Change the dashboard into edit-mode.

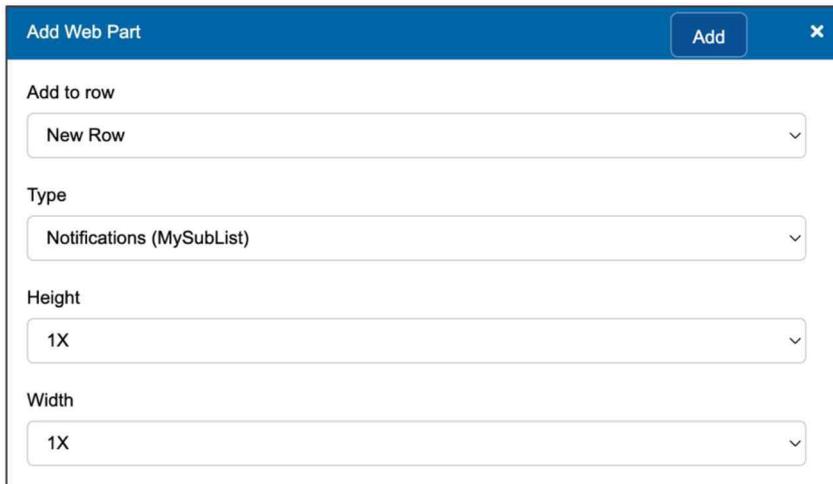


2. Click the rounded add button from the bottom.



3. The “Add Web Part” window will appear.

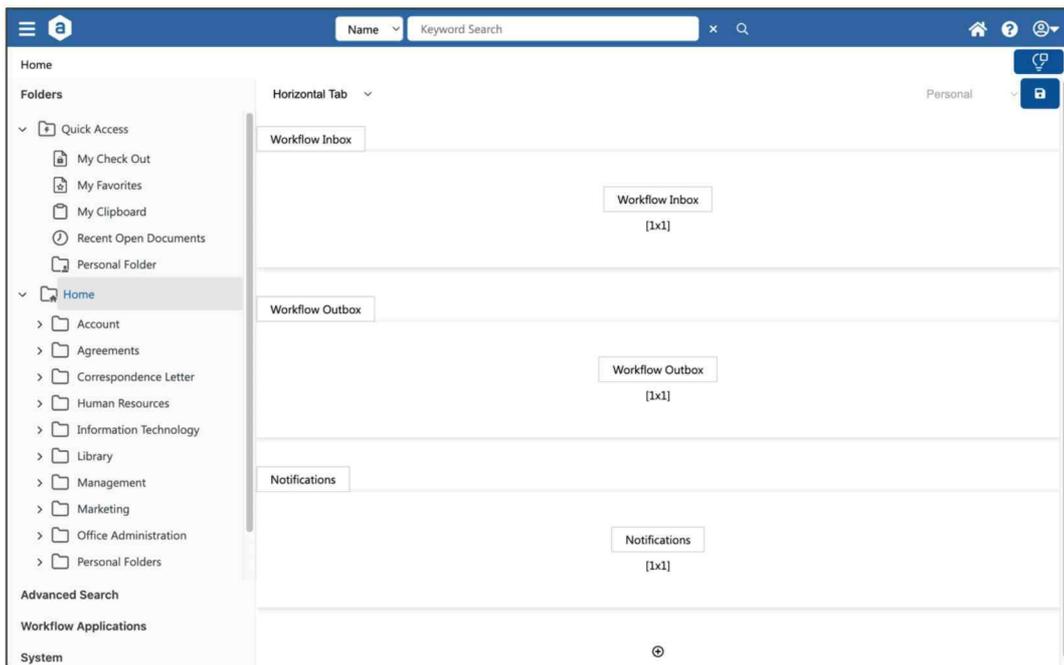
4. Use the following setting:



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.

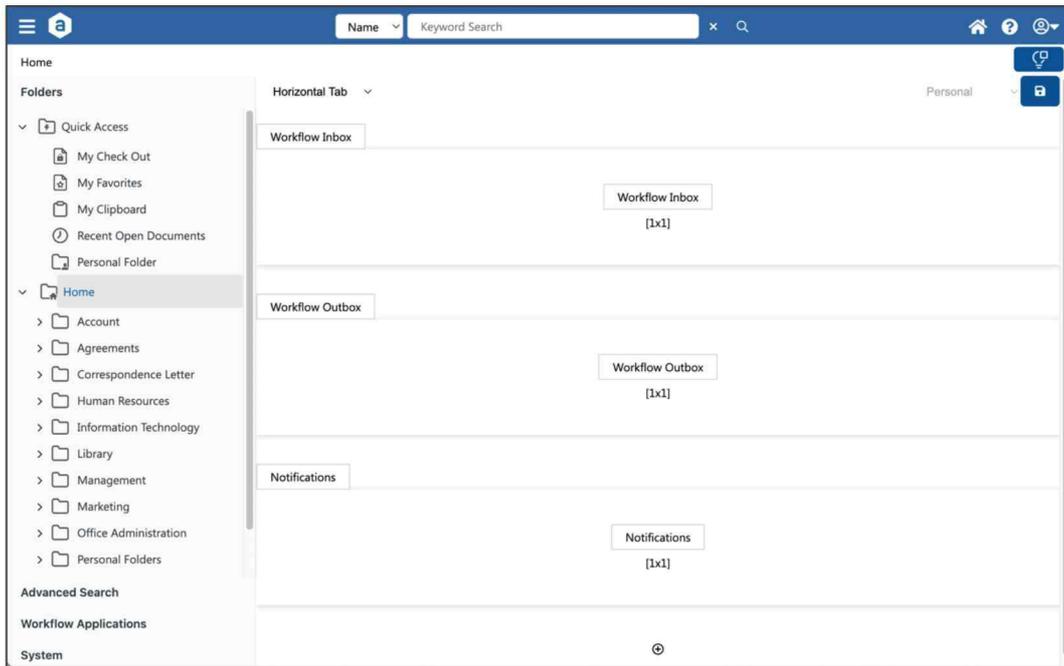


8. A new web part is added to your dashboard.



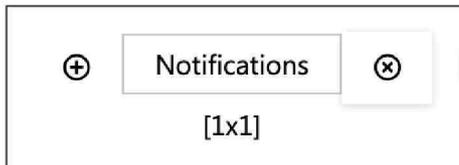
IV. Delete an existing web part

1. Change the dashboard into edit-mode.

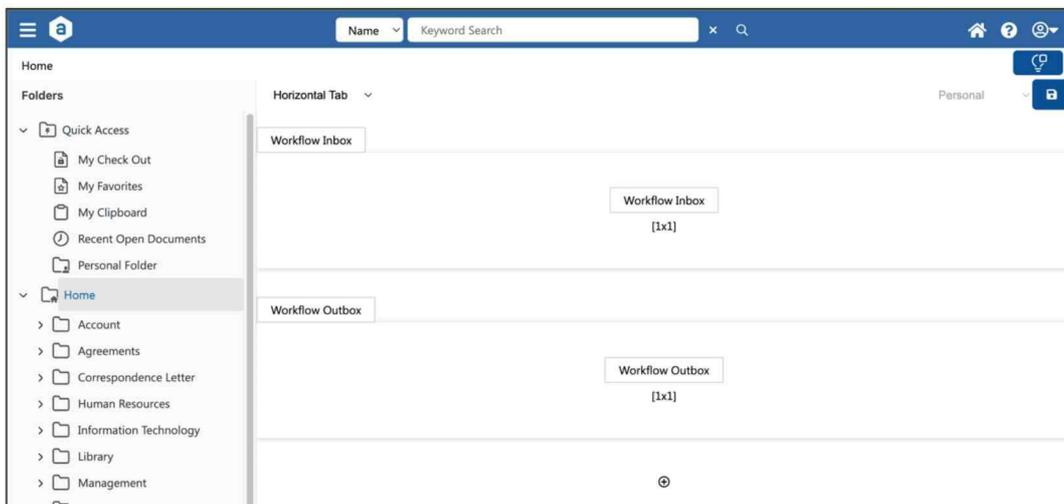


2. Move the mouse cursor to Notifications webpart.

3. Click the rounded cross icon.

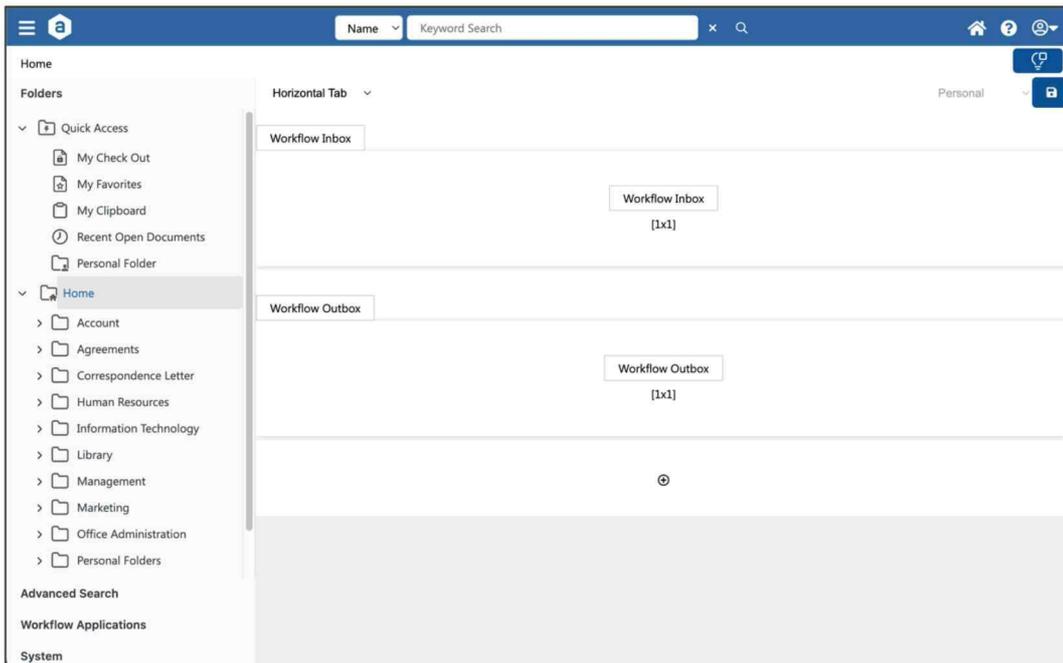


4. The web part is deleted.

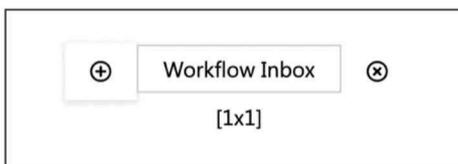


V. Add a new web part to existing row

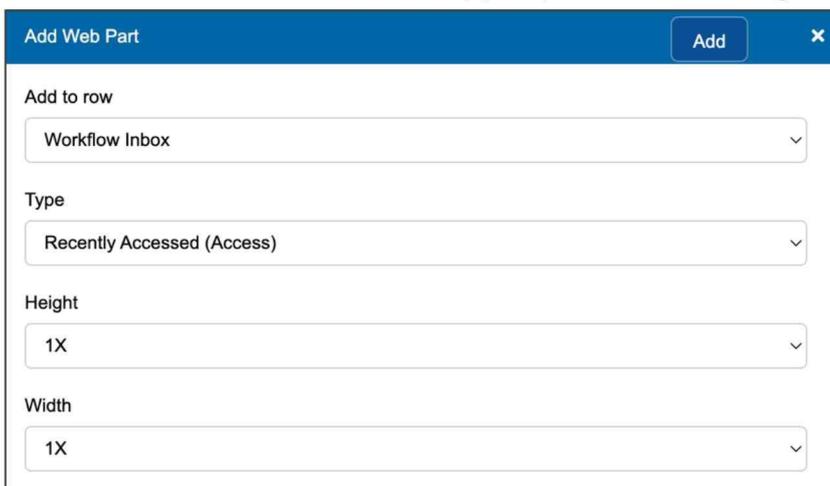
1. Change the dashboard into edit-mode.



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

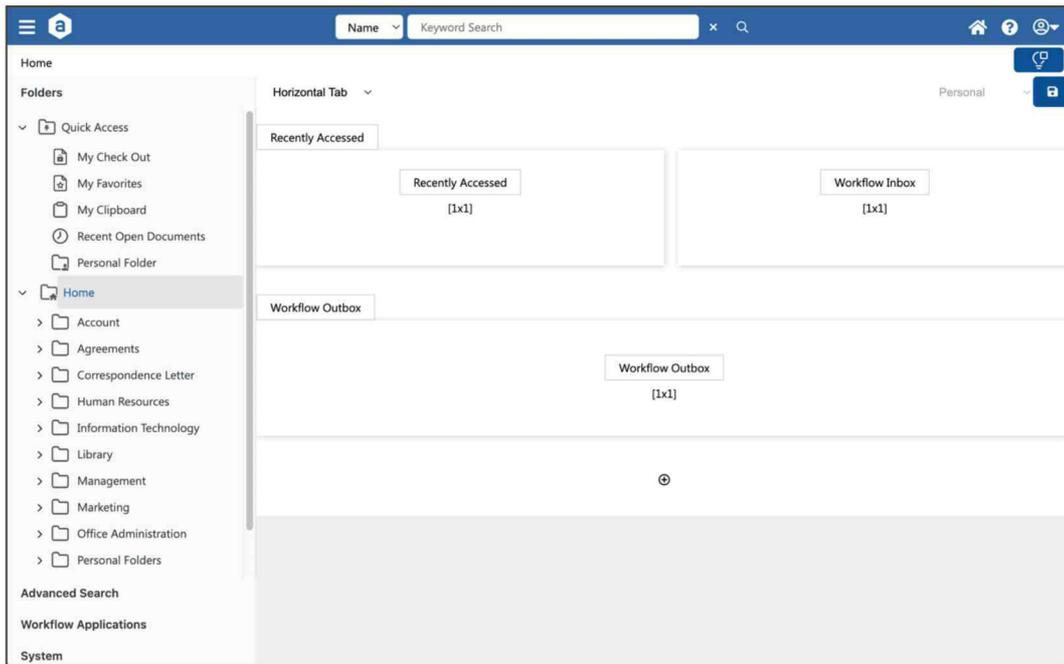


4. The “Add Web Part” window will appear, use the following setting:

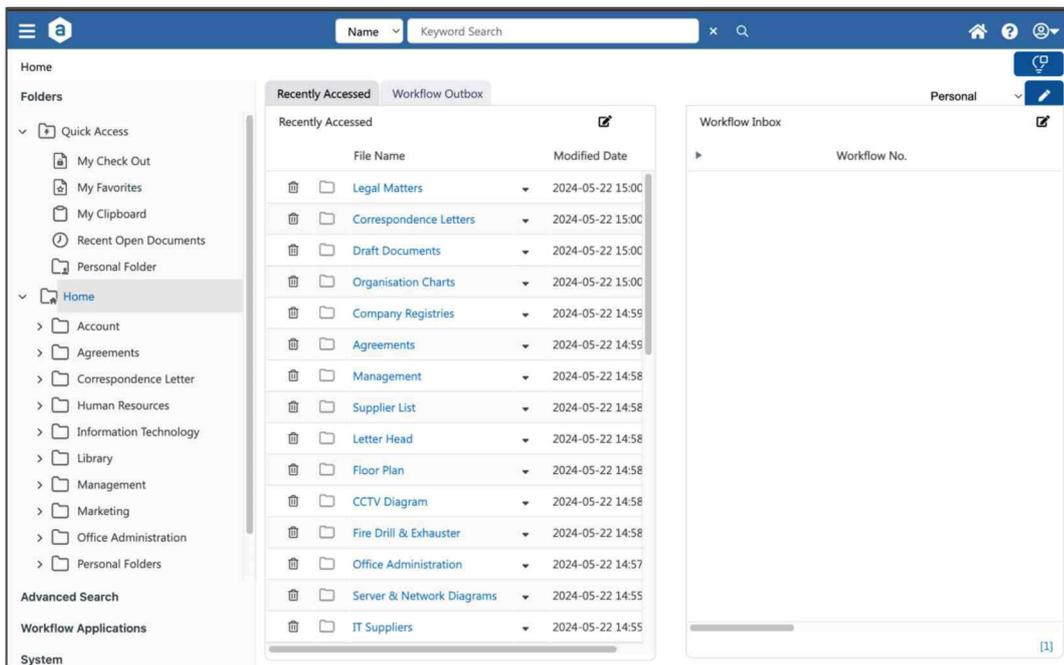


5. Click the “Add” button to commit changes.

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

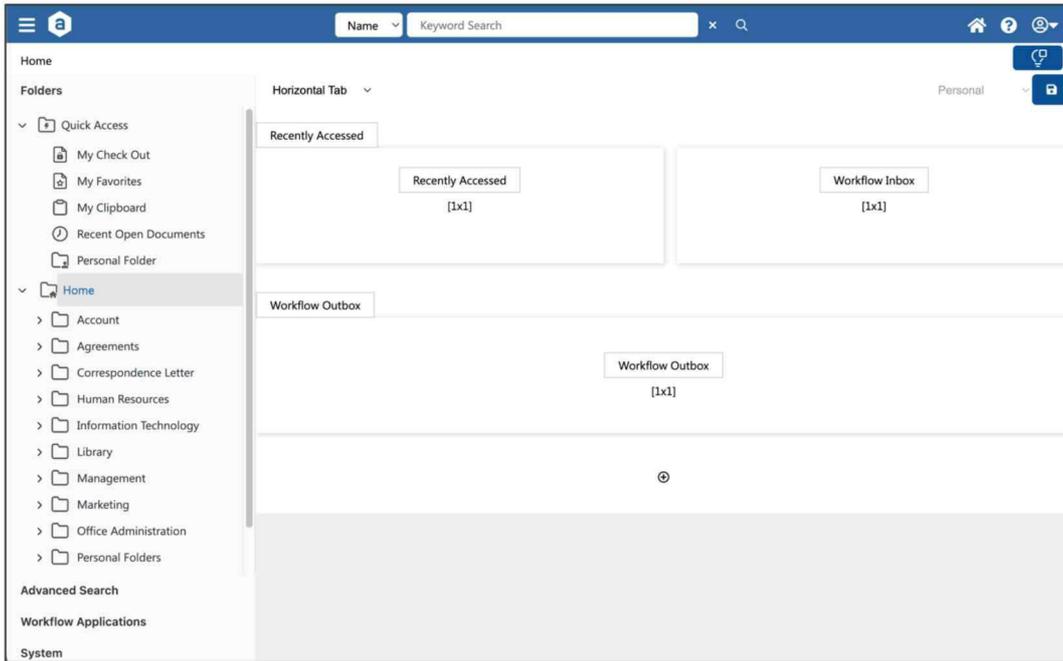


7. Click the blue save button from the top right-handed corner to commit changes.

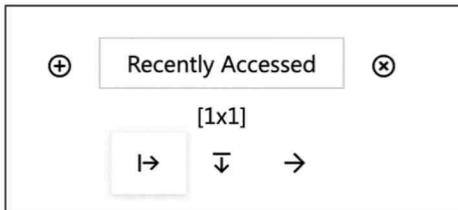


VI. Enlarge an existing web part

1. Change the dashboard into edit-mode.



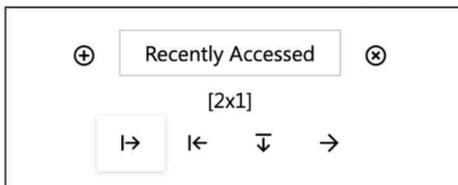
2. To enlarge the width of an existing web part, click the first arrow icon.



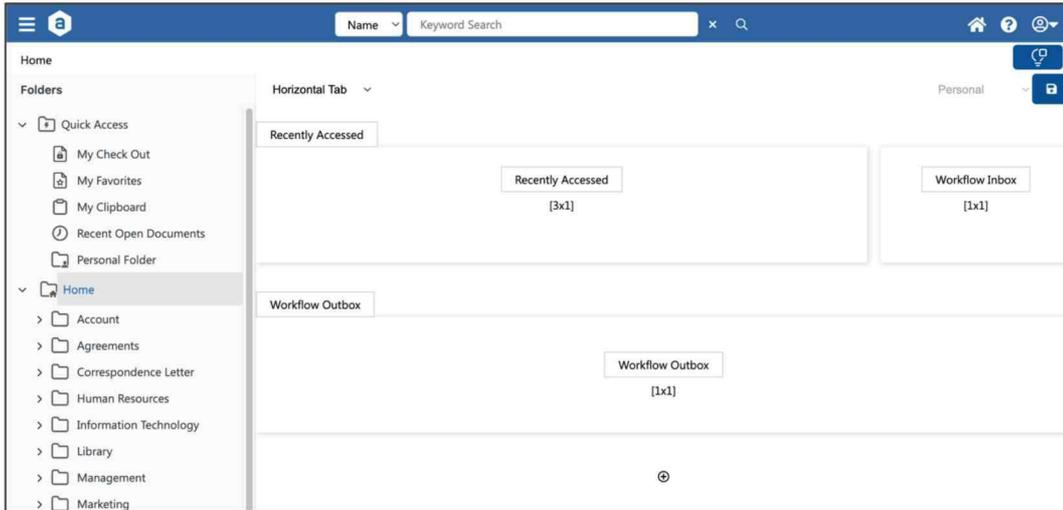
3. The web part width is enlarged with a ratio of [2 x 1].



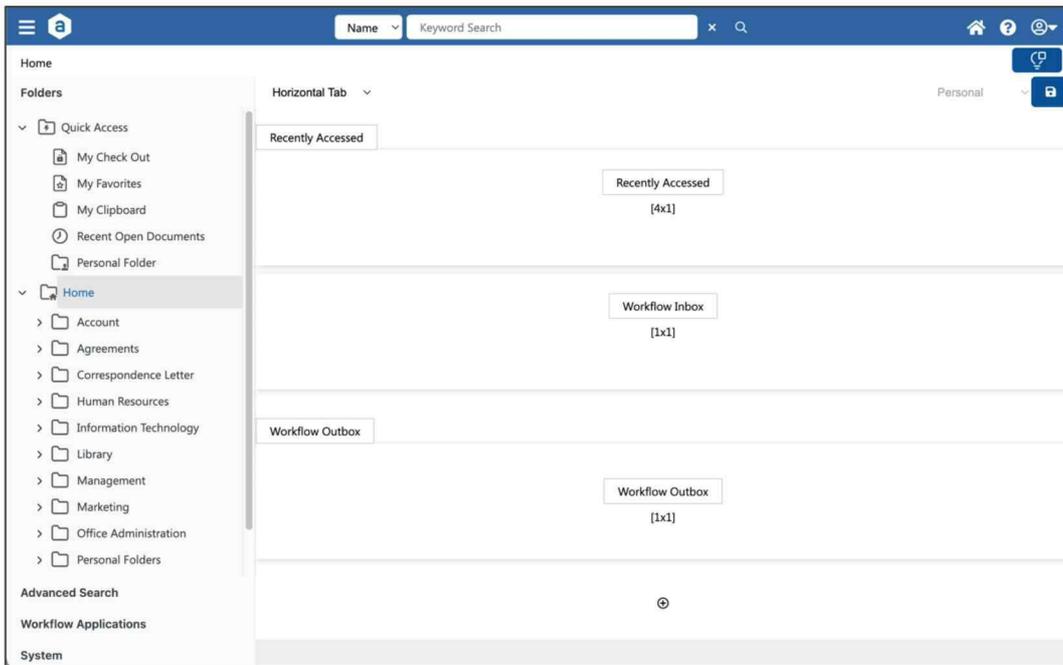
4. Click the first arrow icon again to enlarge further with a ratio of [3 x 1].



- 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

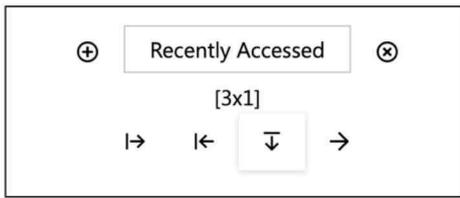


Recently Accessed at [4 x 1] ratio

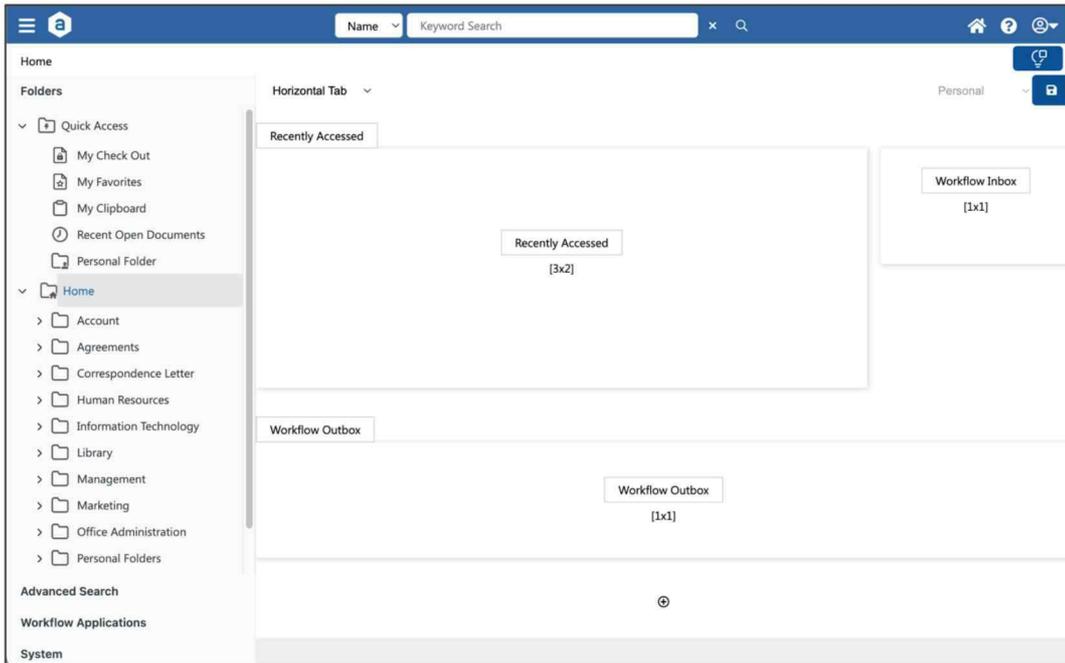
- 6. To shrink the ratio, click the left arrow icon.



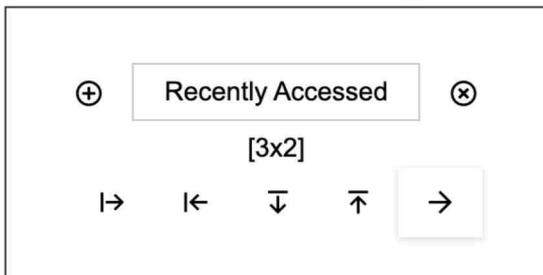
7. Similarly, to enlarge the height of the web part, click the down arrow.



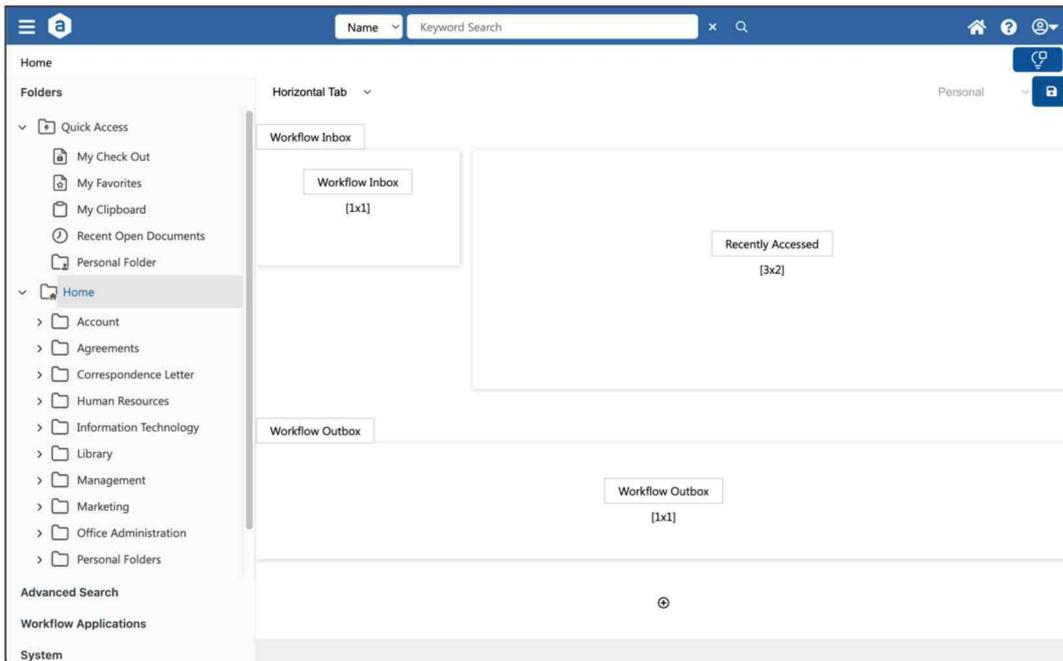
8. The web part height is enlarged.



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

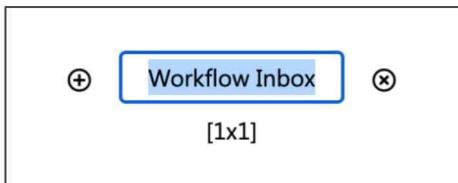


10. This will interchange the position between two web parts.

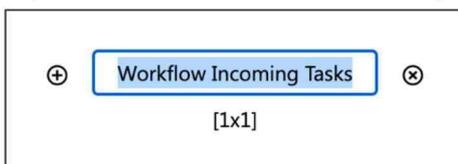


VII. Rename a web part

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



2. Input the new name of the web part.

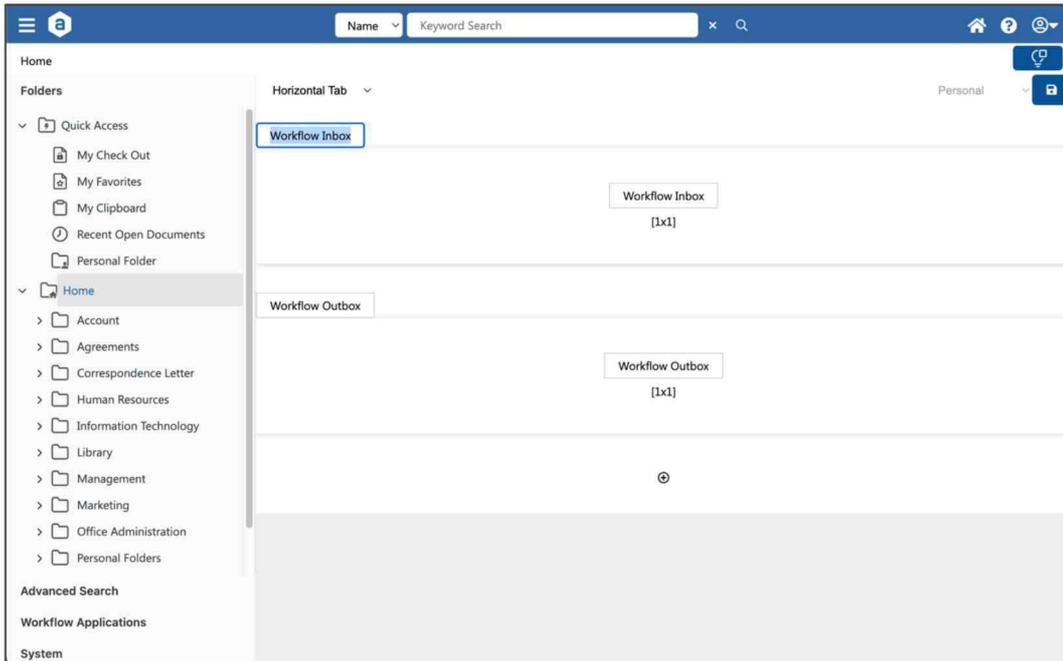


3. Click the blue save button from the top right-handed corner to commit changes.



VIII. Rename a tab

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



2. Input the new name of the tab.



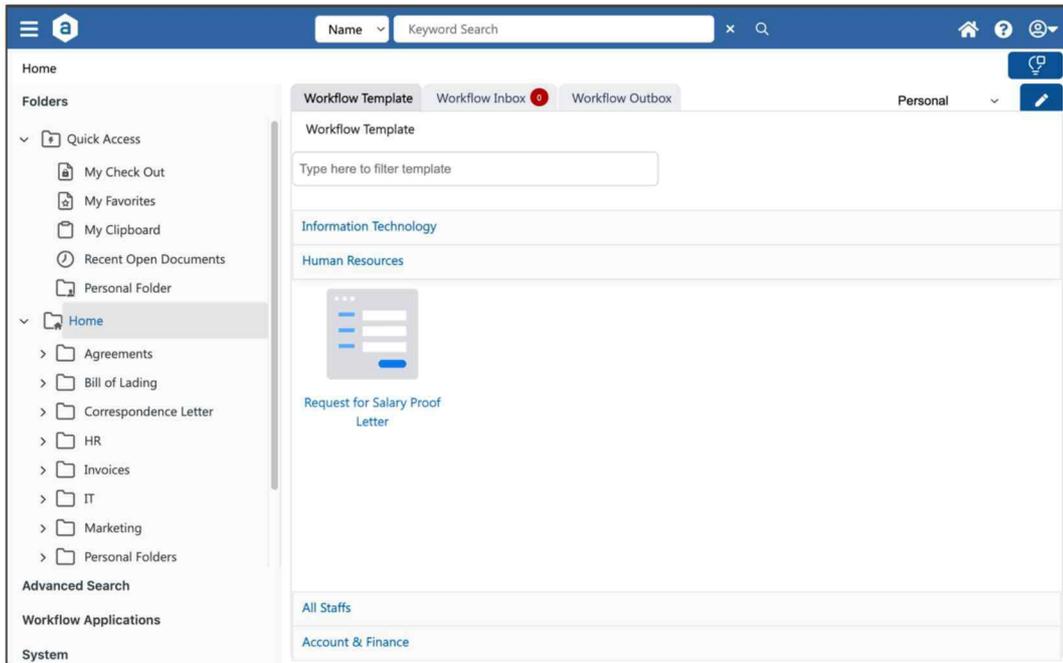
3. Click the blue save button from the top right-hand corner to commit changes.



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.

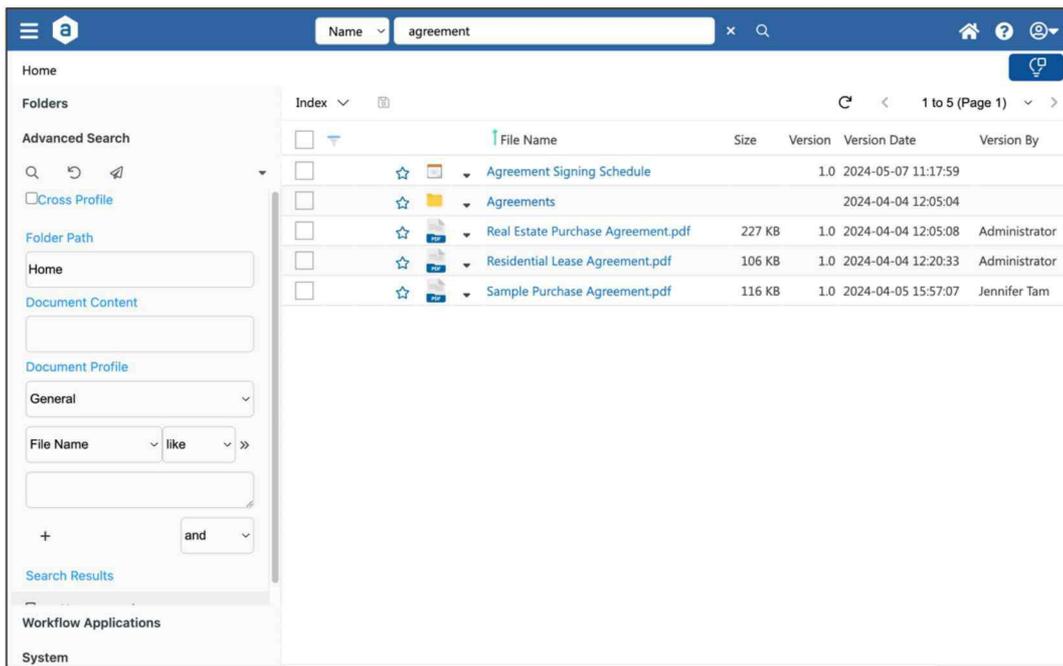


3. Input the search keyword (e.g. agreement).



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

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



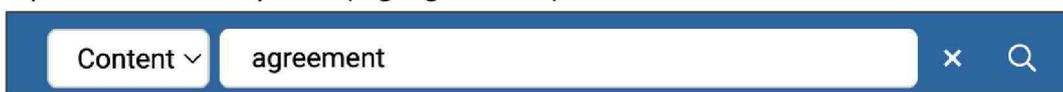
Note: Name Search does not support folders under “Quick Access”.

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).
- From the top blue bar, select “Content” as search type.

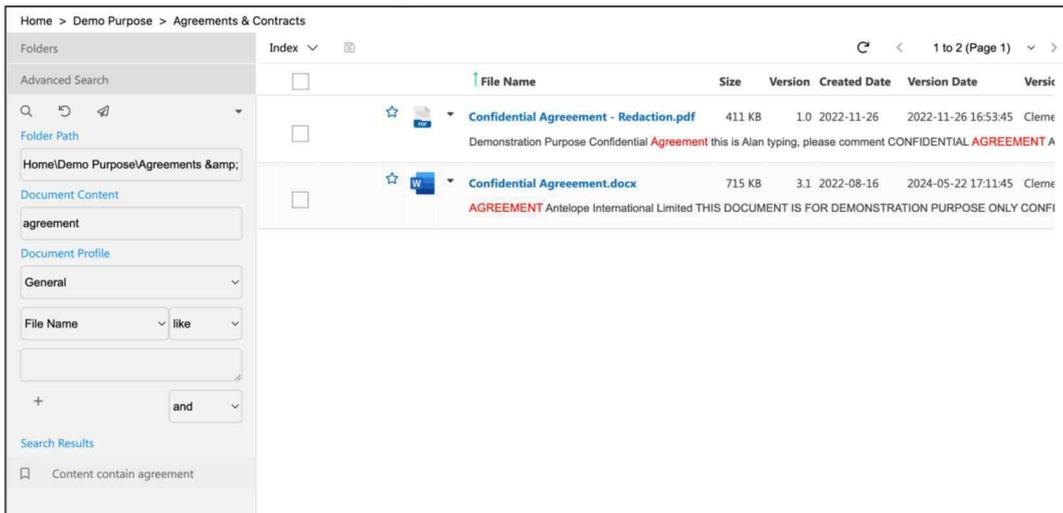


- Input the search keyword (e.g. agreement).



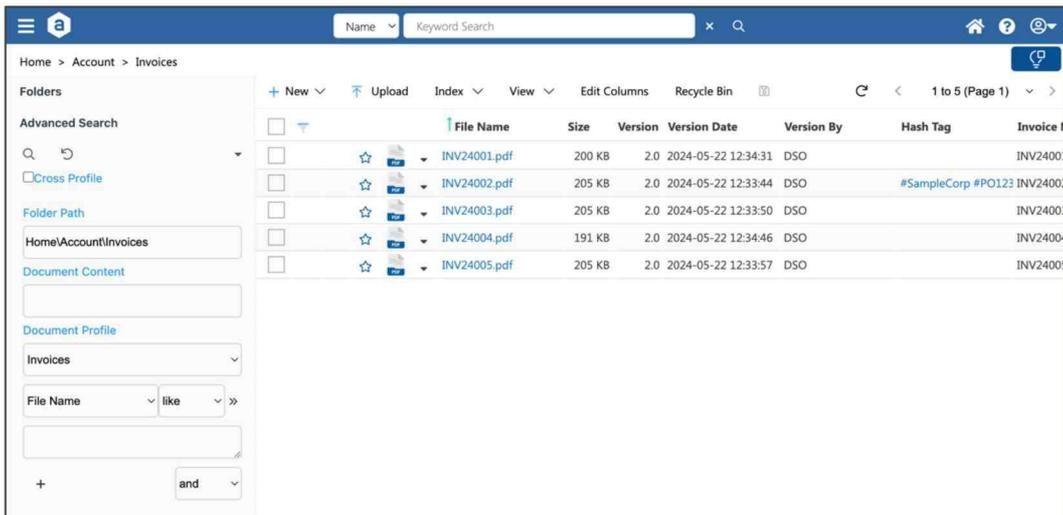
- Press “Enter” or click the search icon.

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

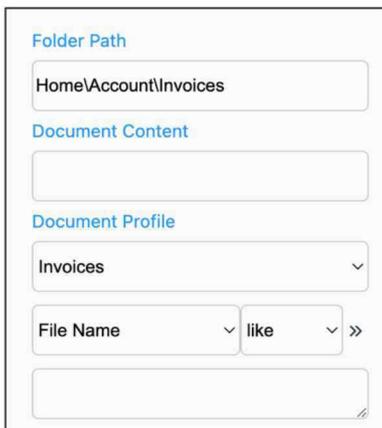


III. Advanced Search

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.



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

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

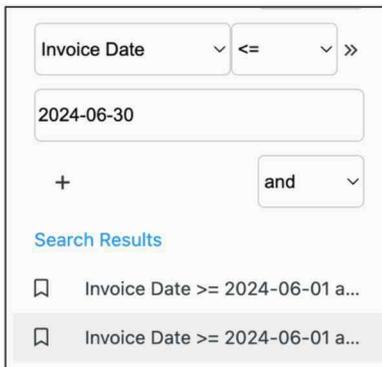
- Finally click the search icon to perform the advanced search.

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

File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice N
INV24005.pdf	205 KB	2.0	2024-05-22 12:33:57	DSO		INV24005

IV. Save Search Template

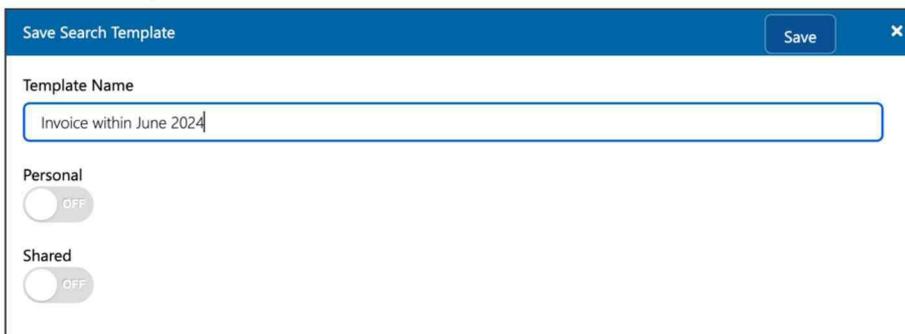
1. After you perform an advanced searching, your search setting will be listed at the bottom of the panel.



The screenshot shows a search panel with the following elements:

- A search criteria field: "Invoice Date" with a dropdown arrow, followed by "<=" and another dropdown arrow, followed by ">>".
- A date input field containing "2024-06-30".
- A plus sign "+" and a dropdown menu containing "and".
- A link labeled "Search Results" in blue.
- A list of search results, each with a flag icon and the text "Invoice Date >= 2024-06-01 a...".

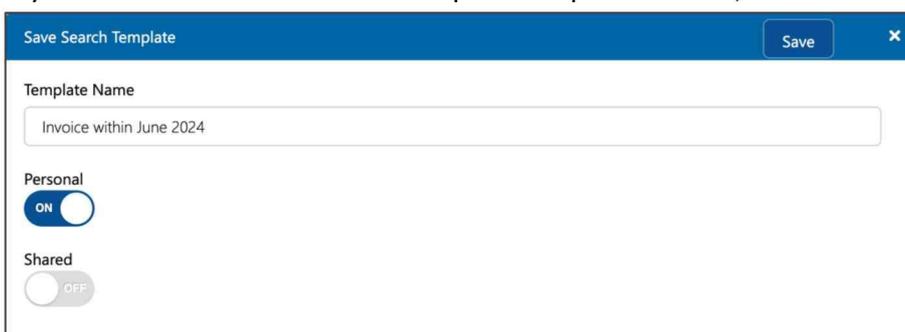
2. To save your search setting for future use, click the flag icon. 
3. The “Save Search Template” window will appear. Input a “Template Name” for your search template.



The screenshot shows the "Save Search Template" dialog box with the following elements:

- A title bar with "Save Search Template" and a "Save" button and a close icon.
- A "Template Name" input field containing "Invoice within June 2024".
- A "Personal" checkbox, which is checked (ON).
- A "Shared" checkbox, which is unchecked (OFF).

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



The screenshot shows the "Save Search Template" dialog box with the following elements:

- A title bar with "Save Search Template" and a "Save" button and a close icon.
- A "Template Name" input field containing "Invoice within June 2024".
- A "Personal" checkbox, which is checked (ON).
- A "Shared" checkbox, which is unchecked (OFF).

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.



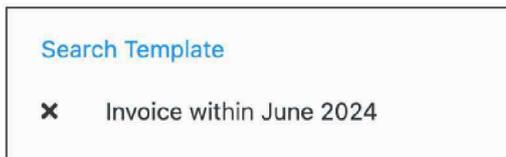
The screenshot shows a dialog box titled "Save Search Template" with a "Save" button and a close button (X). It contains the following fields and controls:

- Template Name:** A text input field containing "Invoice within June 2024".
- Personal:** A toggle switch currently set to "OFF".
- Shared:** A toggle switch currently set to "ON".
- Folder Path:** A text input field containing "Home\Account\Invoices".

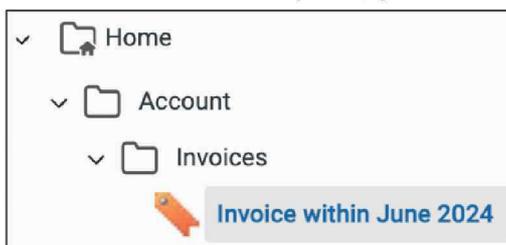
6. Note: If you do not save your search template, once you refresh the web browser screen, all your search history will be cleared.

V. Load Search Template

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

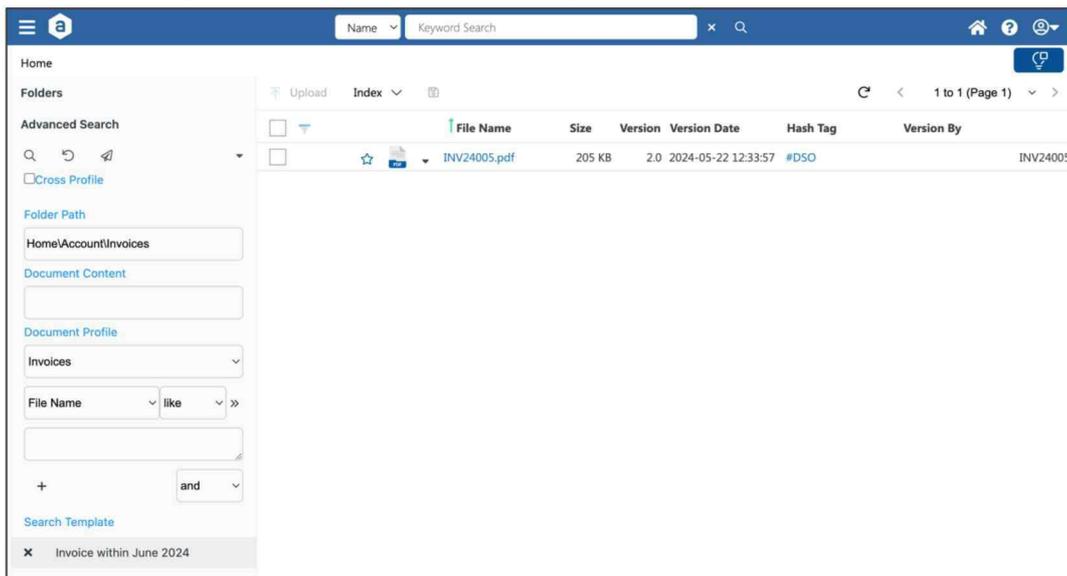


For shared search template, go to the folder that you saved the template.



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

3. Antelope will perform the search result for you.

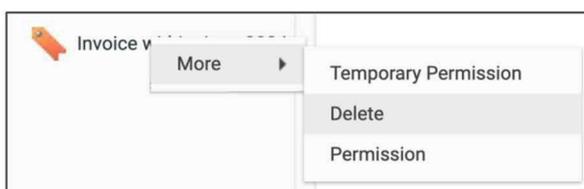


VI. Delete Search Template

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.

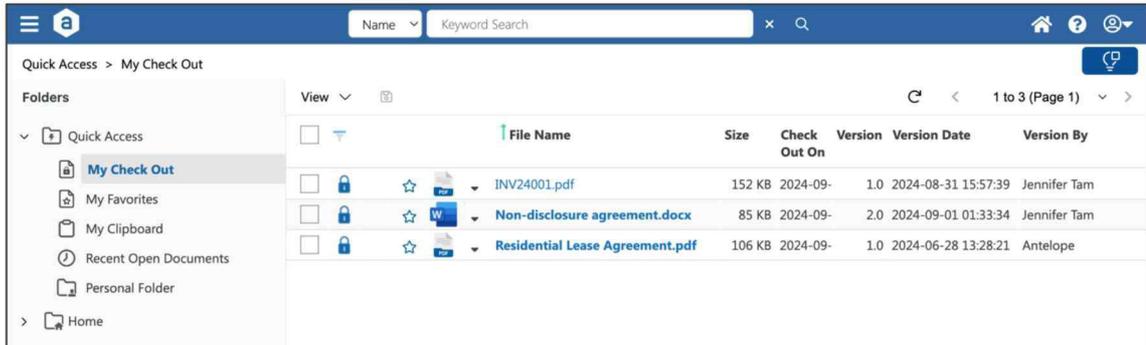


2. A confirmation message “Are you sure to delete?” will appear.
3. Click “Confirm” to delete the search template.

E. Quick Access

I. My Check-Out

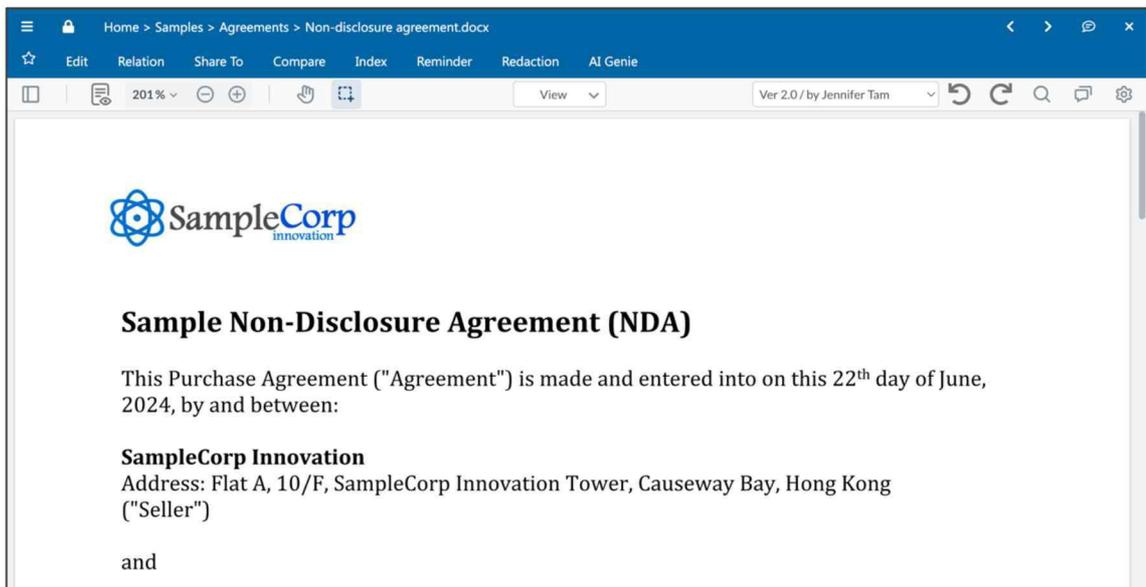
1. Under “Quick Access \ My Check Out”, the folder lists out all your check-out documents.



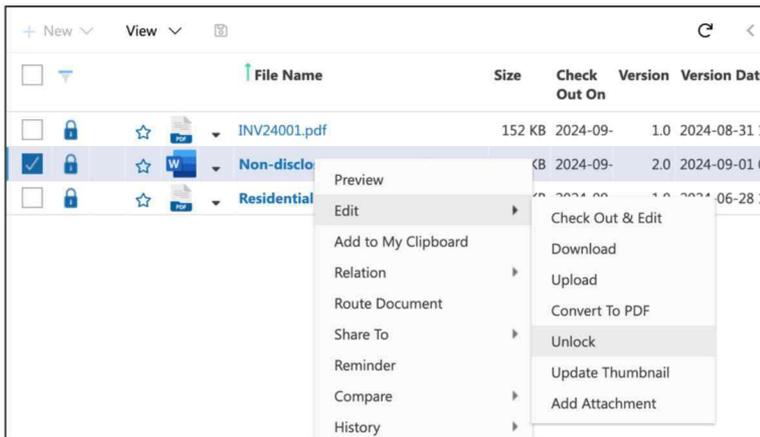
2. Click the document link to open for preview.



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

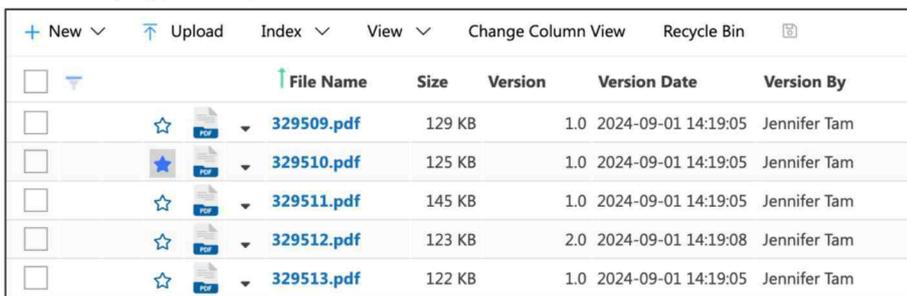


- To unlock the document, right-click to bring up the context menu, select “Edit > Unlock”.

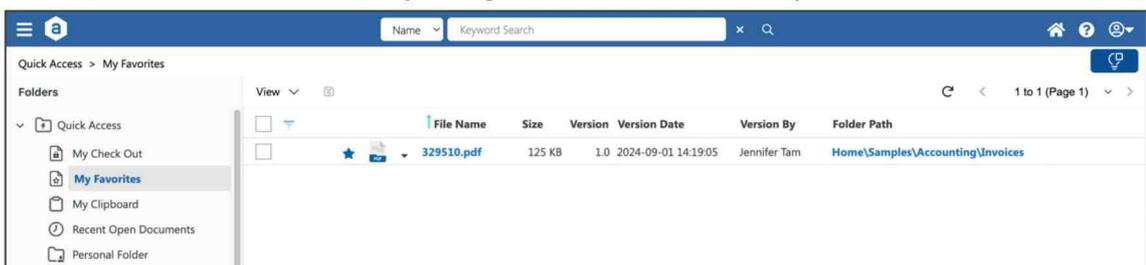


II. My Favorites

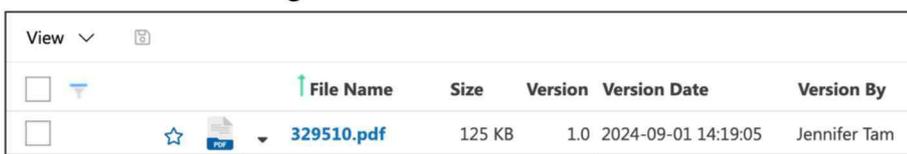
- You can click the “Star” icon to mark any objects as favorites, including document, calendar, hyperlink, folder and workflow records.



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

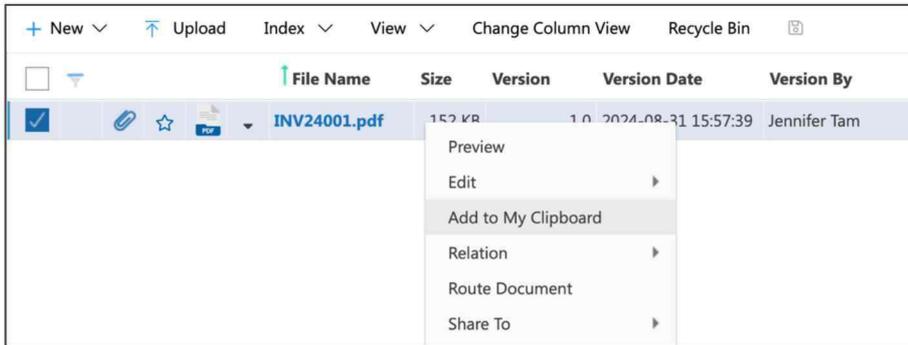


- Click the “Star” icon again to remove from favorites.

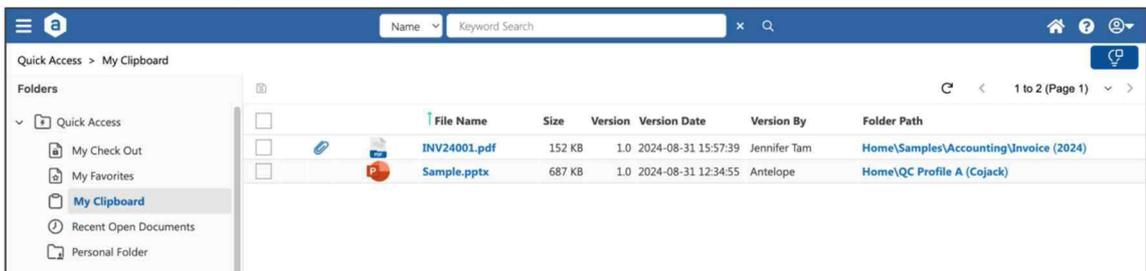


III. My Clipboard

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



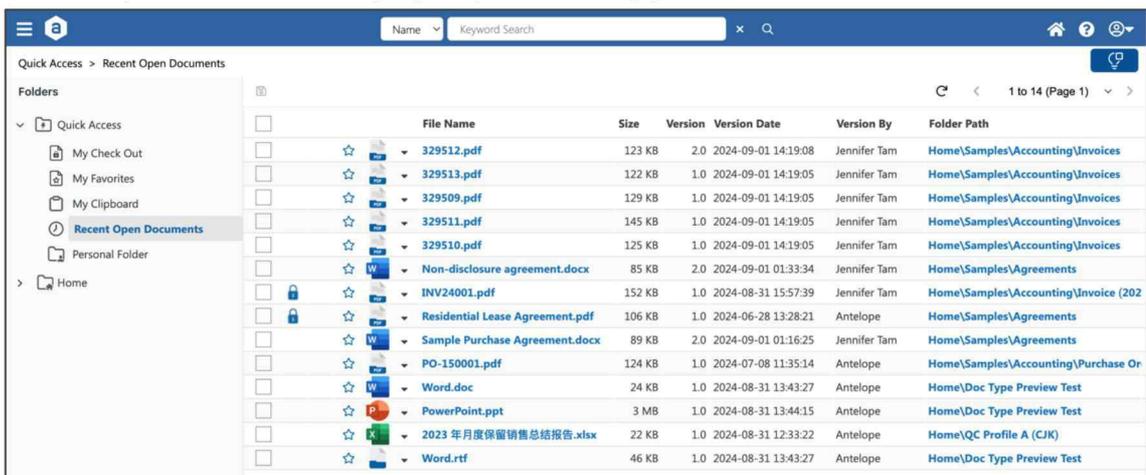
2. You can add multiple documents to clipboard.



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

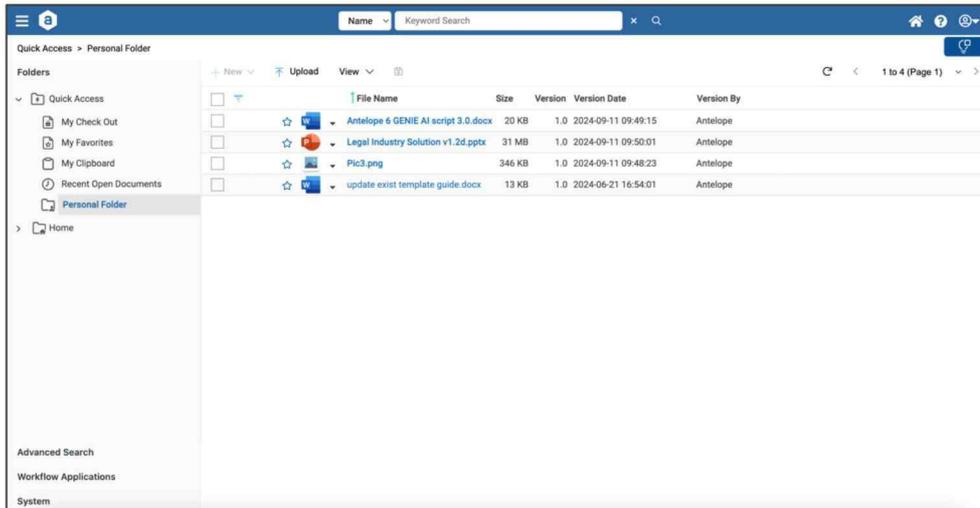
1. Recent Open Documents display all your recently preview documents.



2. It will show the most recent 50 documents.

V. Personal Folder

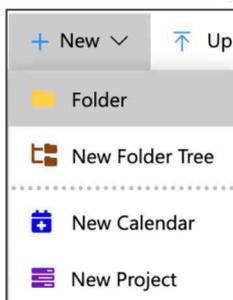
1. Personal folder contains all tasks and documents you have been working on personally.



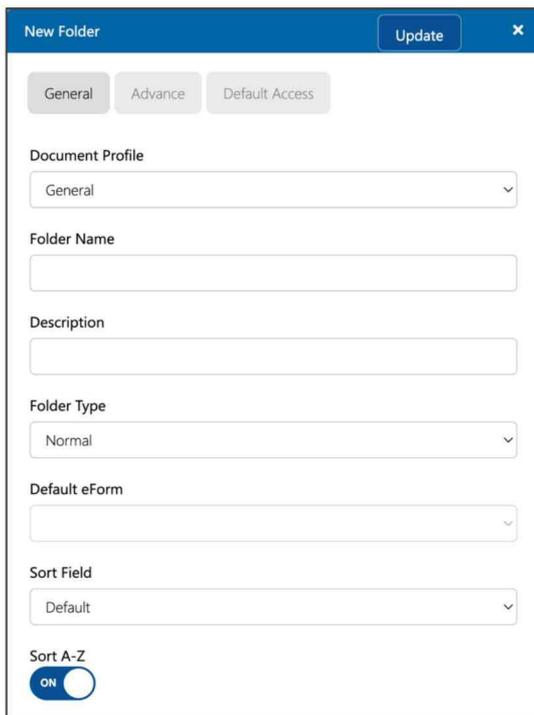
F. Folder

I. Create New Folder

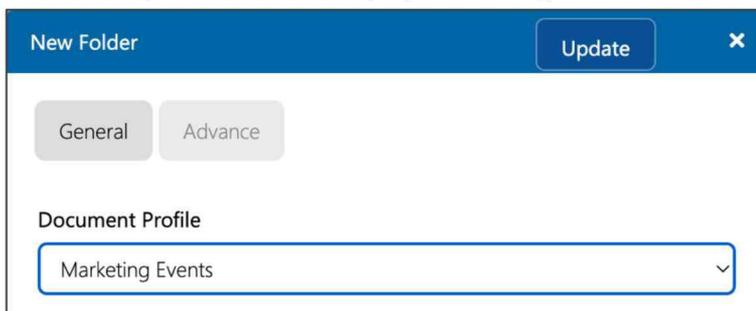
1. To create a new folder, select a location from the folder tree. For example, the Marketing folder.
2. From the “New” pull-down menu, select “Folder”.



3. The “New Folder” window will appear.



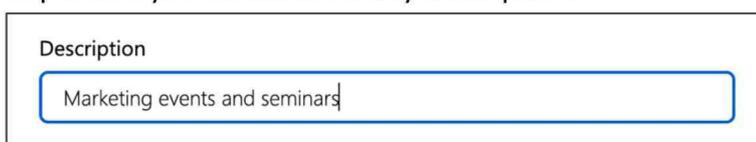
4. Choose the “Document Profile”, which defines what meta-data are stored in your document profile. For example, Marketing Event.



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.

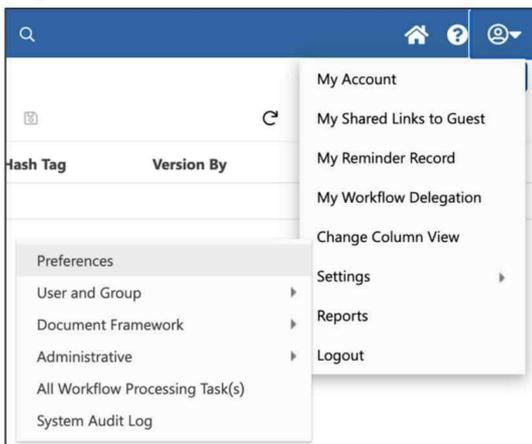


7. Click “Update” button to commit changes.

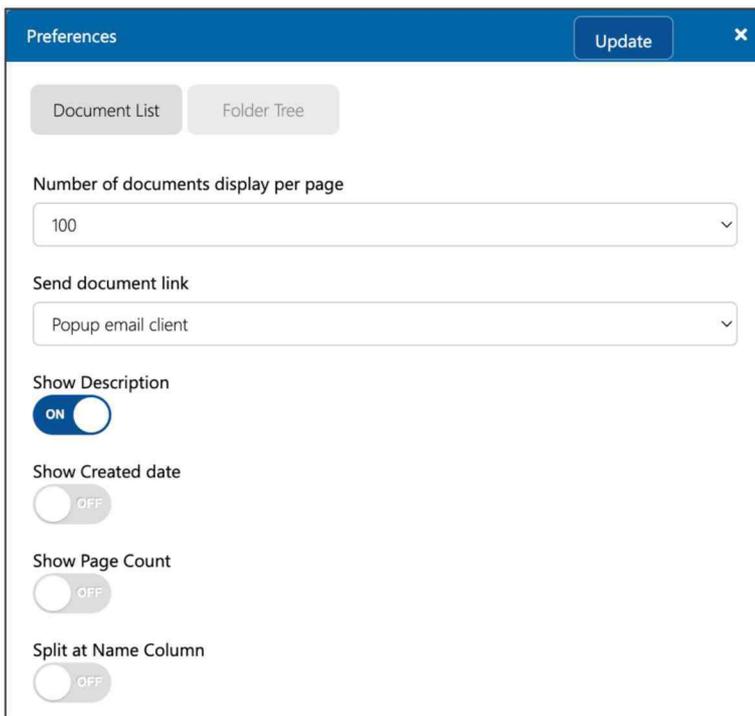
8. A new folder “Events and Seminars” is created.



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:

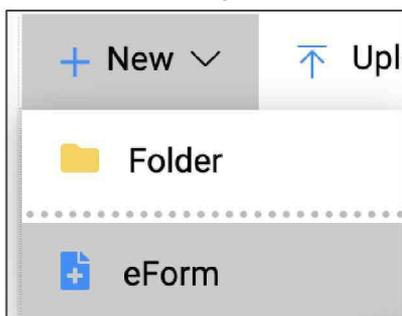
Folder Type	Description
Normal	Electronic documents, by default the folder is in list view.
Album	Photos and images, by default the folder is in thumbnail view.
eForm	eForm, by default the folder is in list view.

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

The screenshot shows a 'New Folder' dialog box with the following fields:

- Document Profile:** Employee Profile
- Folder Name:** Employee Profile
- Description:** (Empty text box)
- Folder Type:** EForm
- Default eForm:** Employee Profile.rft

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.

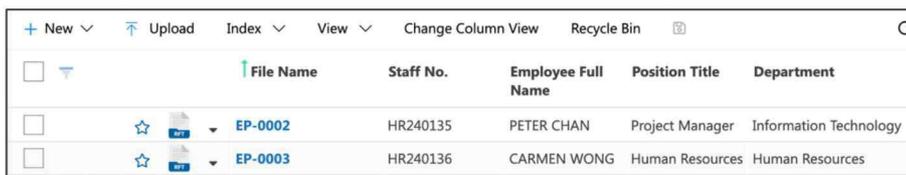
Note: You can try on the sample folder “Home\Samples\Human Resources\Employee Profile”

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.

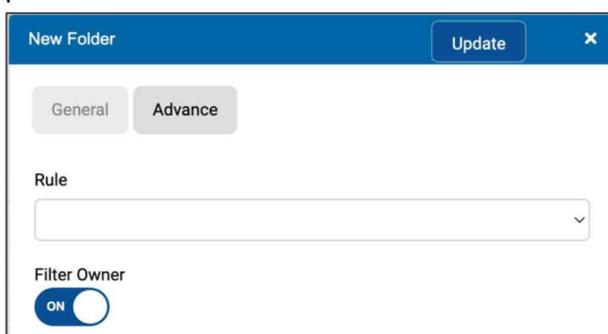


File Name	Staff No.	Employee Full Name	Position Title	Department
EP-0002	HR240135	PETER CHAN	Project Manager	Information Technology
EP-0003	HR240136	CARMEN WONG	Human Resources	Human Resources

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.



- 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.

- If your login account is assigned the “Manage” rights on this folder, you can see all documents even the owner is not you.
- 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	<table border="1"> <thead> <tr> <th>File Name</th> <th>Size</th> <th>Version</th> <th>Version Date</th> <th>Version By</th> </tr> </thead> <tbody> <tr> <td>EP-0042</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:51:24</td> <td>Jennifer Tam</td> </tr> <tr> <td>EP-0043</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:52:42</td> <td>Antelope</td> </tr> <tr> <td>EP-0044</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:52:56</td> <td>User1</td> </tr> <tr> <td>EP-0045</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:54:18</td> <td>User2</td> </tr> </tbody> </table>	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
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	<table border="1"> <thead> <tr> <th>File Name</th> <th>Size</th> <th>Version</th> <th>Version Date</th> <th>Version By</th> </tr> </thead> <tbody> <tr> <td>EP-0042</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:51:24</td> <td>Jennifer Tam</td> </tr> </tbody> </table>	File Name	Size	Version	Version Date	Version By	EP-0042	13 KB	1.0	2024-09-01 14:51:24	Jennifer Tam															
File Name	Size	Version	Version Date	Version By																							
EP-0042	13 KB	1.0	2024-09-01 14:51:24	Jennifer Tam																							
User1	No	<table border="1"> <thead> <tr> <th>File Name</th> <th>Size</th> <th>Version</th> <th>Version Date</th> <th>Version By</th> </tr> </thead> <tbody> <tr> <td>EP-0044</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:52:56</td> <td>User1</td> </tr> </tbody> </table>	File Name	Size	Version	Version Date	Version By	EP-0044	13 KB	1.0	2024-09-01 14:52:56	User1															
File Name	Size	Version	Version Date	Version By																							
EP-0044	13 KB	1.0	2024-09-01 14:52:56	User1																							
User2	No	<table border="1"> <thead> <tr> <th>File Name</th> <th>Size</th> <th>Version</th> <th>Version Date</th> <th>Version By</th> </tr> </thead> <tbody> <tr> <td>EP-0045</td> <td>13 KB</td> <td>1.0</td> <td>2024-09-01 14:54:18</td> <td>User2</td> </tr> </tbody> </table>	File Name	Size	Version	Version Date	Version By	EP-0045	13 KB	1.0	2024-09-01 14:54:18	User2															
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).

Version History					
	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

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

The 'Edit' dialog box has a blue header with 'Update' and a close button. It contains two tabs: 'General' and 'Advance'. Under 'Advance', there is a 'Rule' dropdown menu. Below that are three toggle switches: 'Filter Owner' (OFF), 'Minor Version' (ON), and 'Show Page Count' (OFF). At the bottom, there are two input fields: 'Max. Major Version' with the value '3' and 'Max. Minor Version' with the value '5'. At the very bottom, there is a 'Copy Index' toggle switch which is turned ON.

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

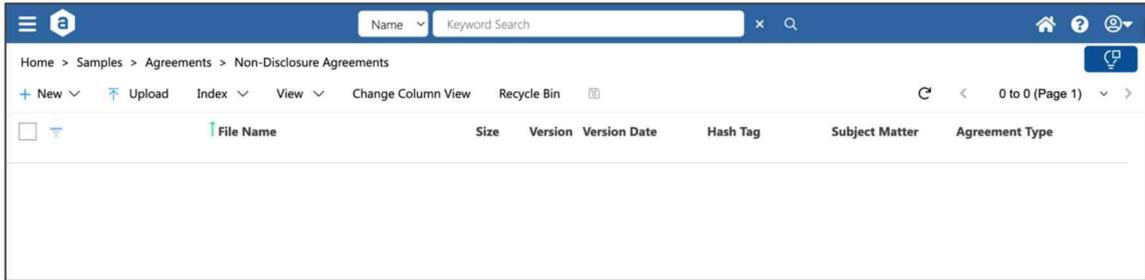


- Input meta-data for the folder.

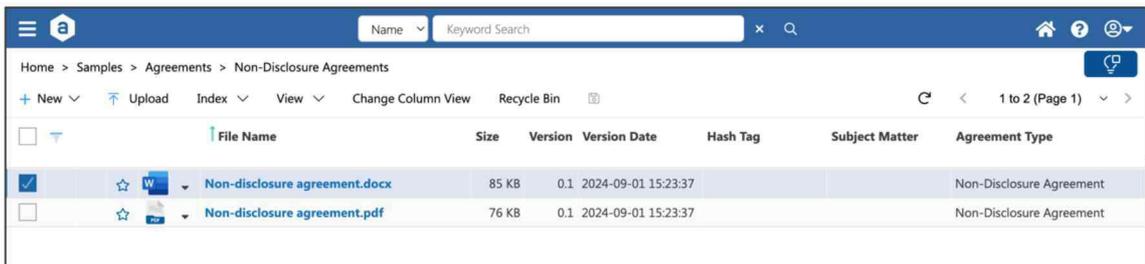
	File Name	Size	Version	Version Date	Hash Tag	Subject Matter	Agreement Type
<input type="checkbox"/>	Non-Disclosure Agreements			2024-09-01 15:21:34	#NDA		Non-Disclosure Agreement
<input checked="" type="checkbox"/>	Rental Agreements			2024-09-01 15:21:34	#Rental Agreement		Property and Rental Purchase Recruitment Agency Non-Disclosure Agreement

- 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.



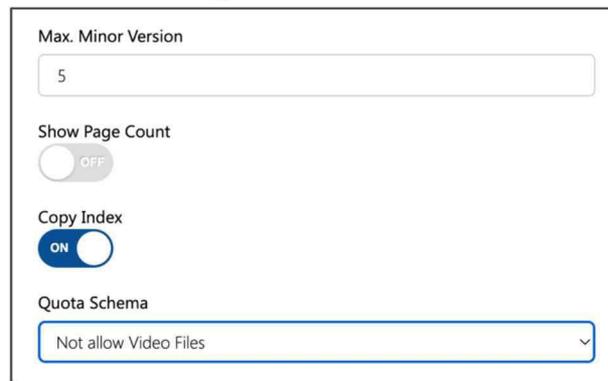
Upload new document to this folder...



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



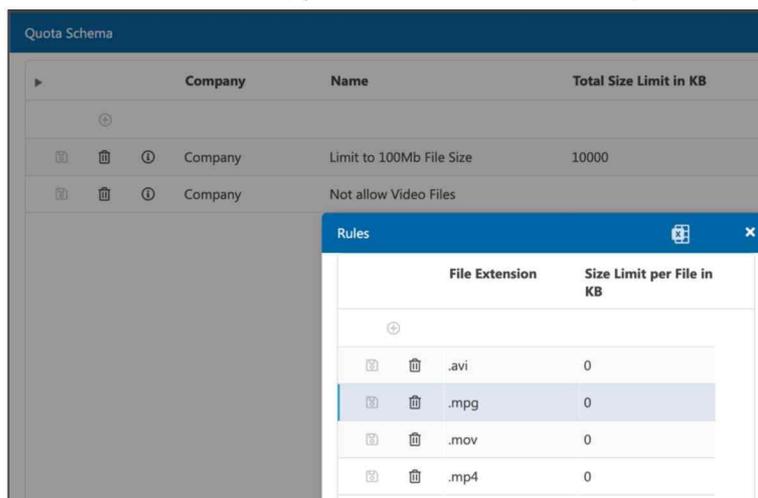
Max. Minor Version

Show Page Count

Copy Index

Quota Schema

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



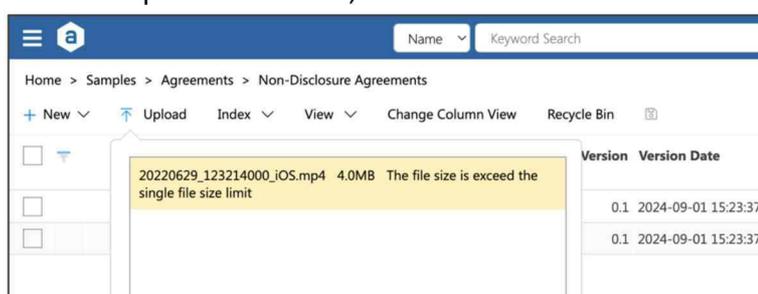
Quota Schema

Company	Name	Total Size Limit in KB
Company	Limit to 100Mb File Size	10000
Company	Not allow Video Files	

Rules

File Extension	Size Limit per File in KB
.avi	0
.mpg	0
.mov	0
.mp4	0

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



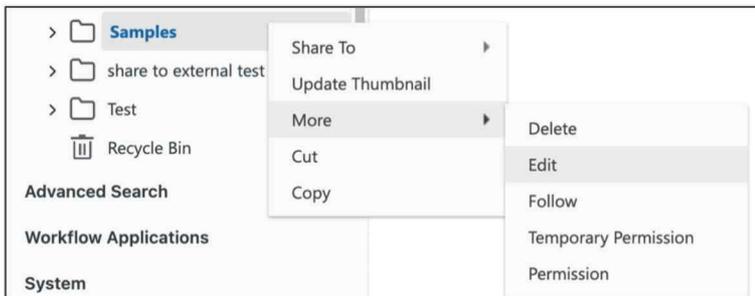
Home > Samples > Agreements > Non-Disclosure Agreements

20220629_123214000_iOS.mp4 4.0MB The file size is exceed the single file size limit

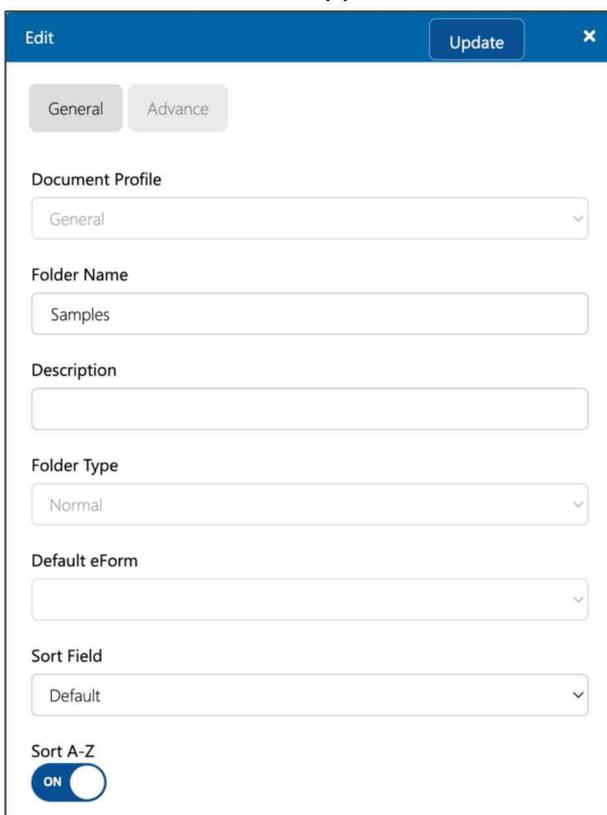
Version	Version Date
0.1	2024-09-01 15:23:37
0.1	2024-09-01 15:23:37

IX. Edit Folder

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



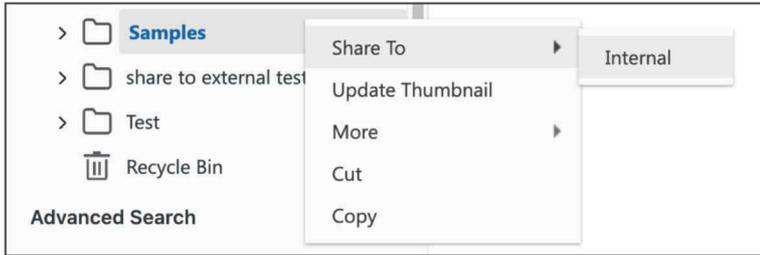
2. The “Edit” window will appear.



3. Click “Update” button to commit changes.

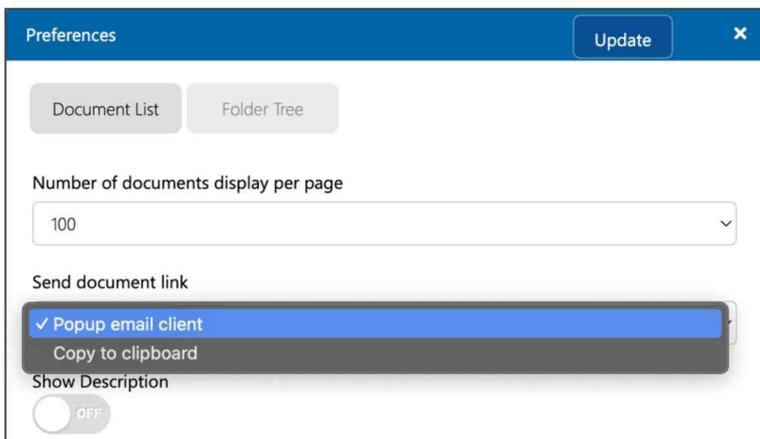
X. Share Folder Link to Internal User

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”.



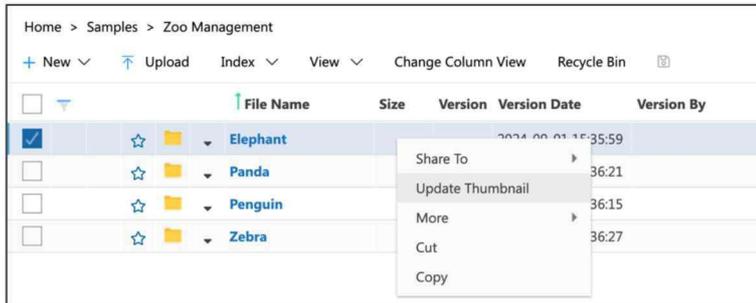
2. This will copy the share link to clipboard or pop-up the default email client.
<https://apac.antelopecloud.net/demo/main.aspx?slid=OGJHHNDFGHGIXXXXXXXXXXXXXX>

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

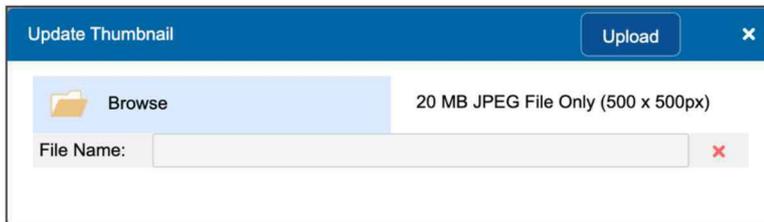


XI. Update Folder Thumbnail

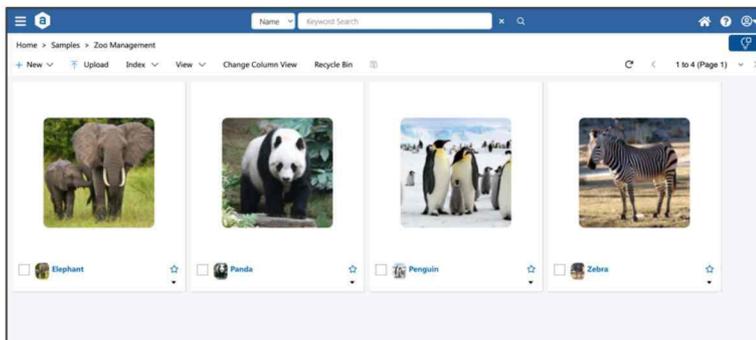
1. Select a folder you want to change thumbnail, right-click to bring up the context menu, select “Update Thumbnail”.



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

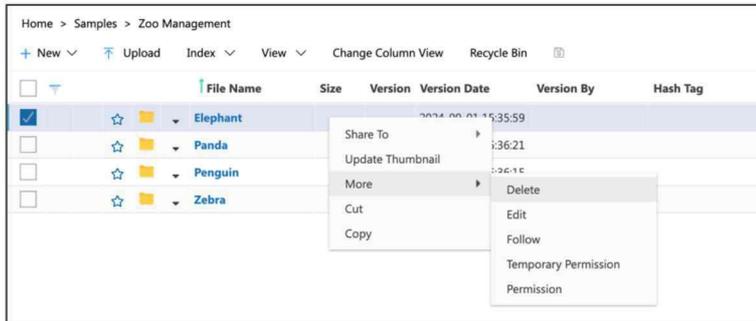


3. To view the folder thumbnail, from the document list toolbar, select View > Thumbnail.



XII. Delete Folder

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



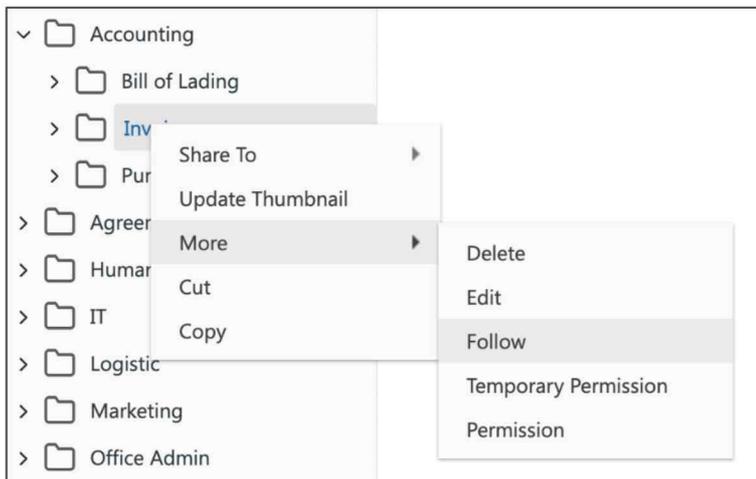
2. A confirmation message will appear, click “Yes” button to confirm.

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

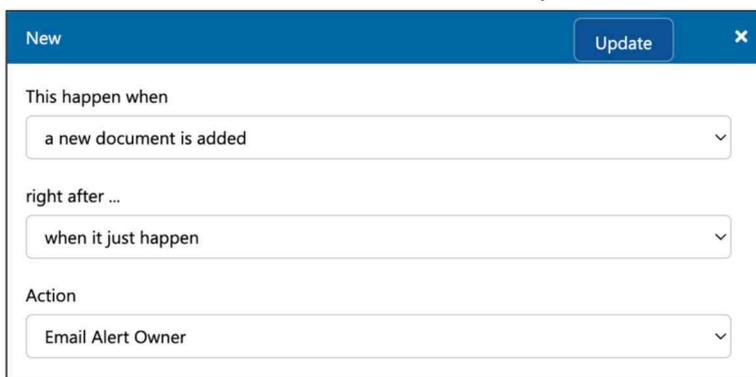
1. To create a new Follow, select a folder, right click to bring out the context menu. Select More > Follow.



- The Follow window will appear. Click the “Add” icon.



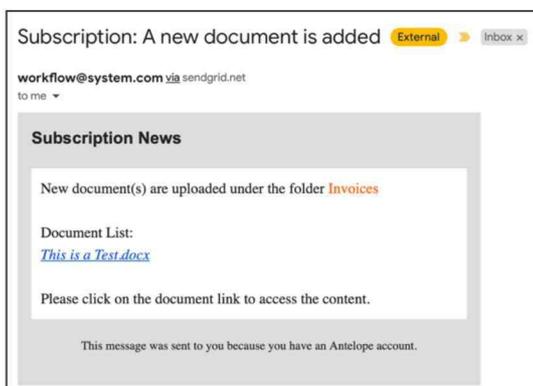
- Select the following options. This will send email to the document owner when a new document is added to the folder. Click “Update” button to save.



- A new Follow rule is added.



- 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.

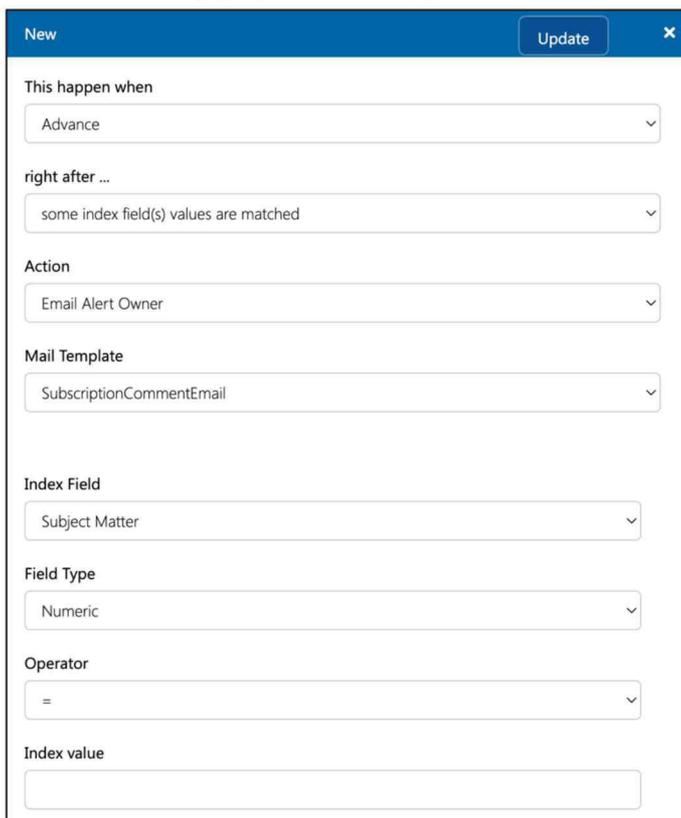
III. Tigger by Index Field

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”.



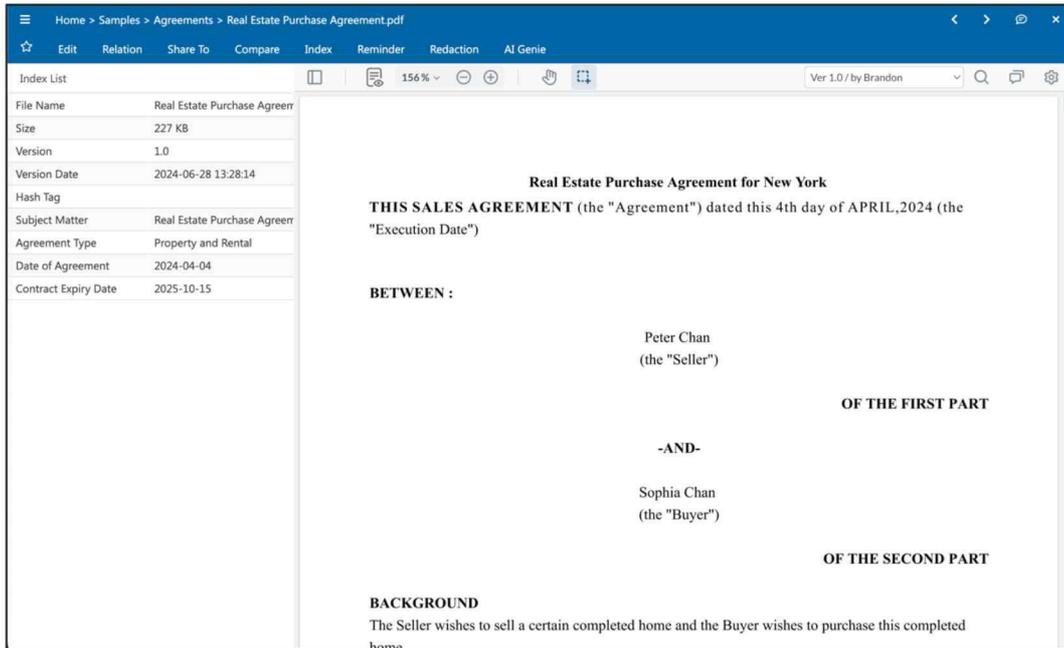
The screenshot shows a configuration window titled "New" with an "Update" button and a close icon. It contains three dropdown menus: "This happen when" set to "Advance", "right after ..." set to "some index field(s) values are matched", and "Action" set to "Email Alert Owner".

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



The screenshot shows the same configuration window as above, but with additional fields expanded. The "Action" dropdown is now "Email Alert Owner". Below it is a "Mail Template" dropdown set to "SubscriptionCommentEmail". The "Index Field" dropdown is set to "Subject Matter". The "Field Type" dropdown is set to "Numeric". The "Operator" dropdown is set to "=". The "Index value" field is currently empty.

- 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"



Index Field

Contract Expiry Date

Field Type

Datetime

Operator

=

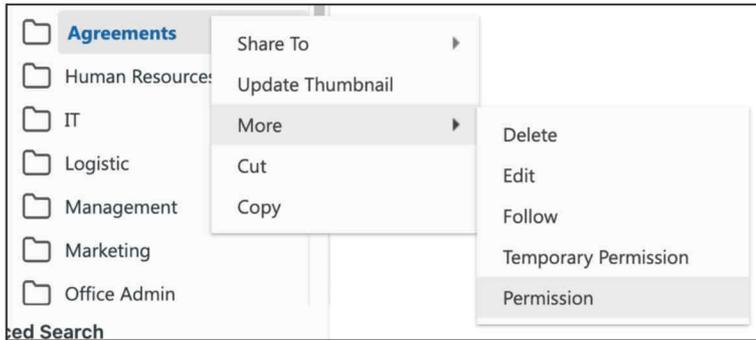
Index value

Now() - 30D

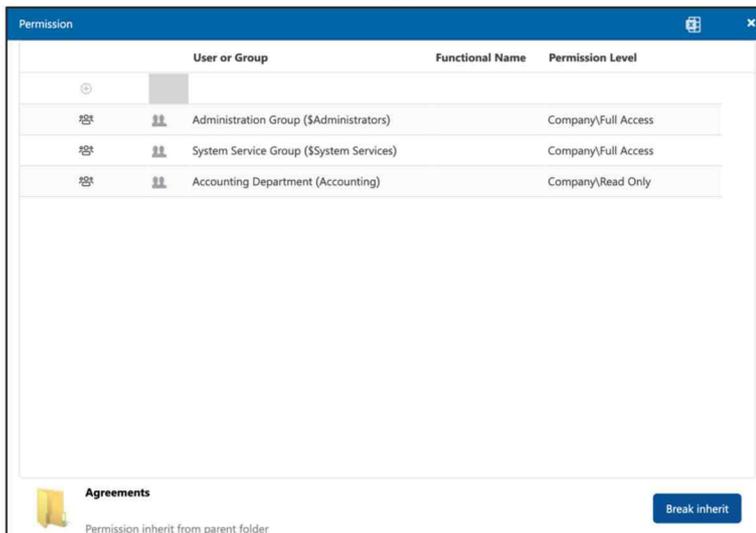
H. Permission

I. Assign Permission

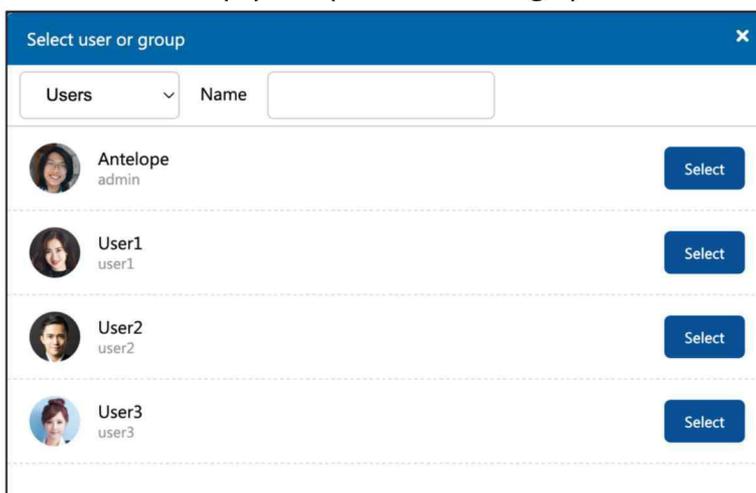
1. To assign a permission, select the folder (or document), right click to bring up the context menu, select More > Permission.



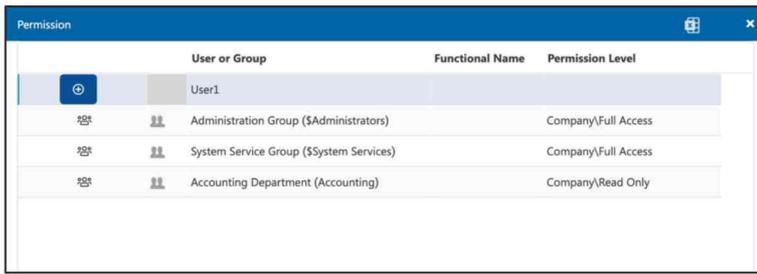
2. The Permission window will appear.



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



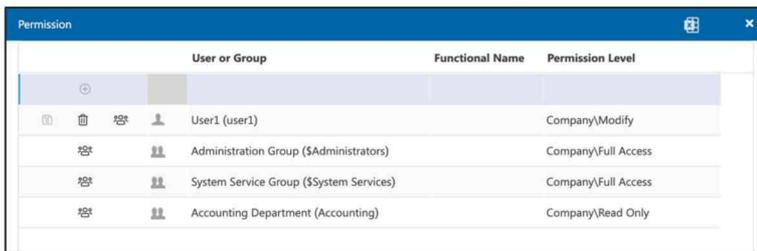
- Select the user account to add, for example "User1".



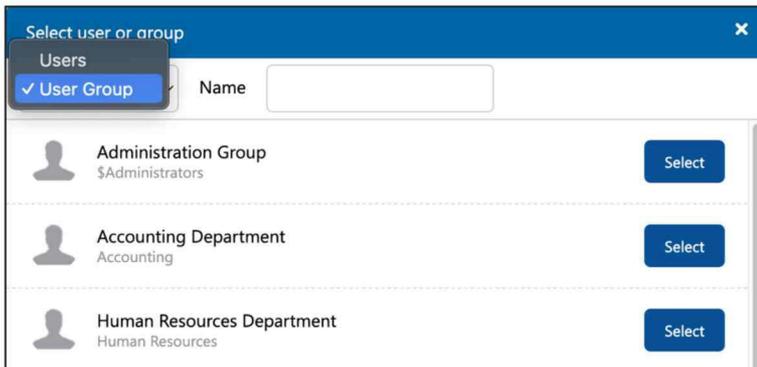
- Select the "Permission Level", for example "Modify".



- Click the blue add icon to commit changes.

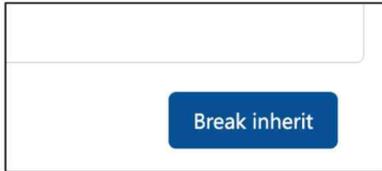


- Instead of user account, you can add User Group by selecting the User Group option.



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.

 A screenshot of the "Permission" window showing a table of permissions. The table has three columns: "User or Group", "Functional Name", and "Permission Level".

	User or Group	Functional Name	Permission Level
🗑️ 🗑️ 🗑️ 👤	Administration Group (\$Administrators)		Company\Full Access
🗑️ 🗑️ 🗑️ 👤	System Service Group (\$System Services)		Company\Full Access
🗑️ 🗑️ 🗑️ 👤	Accounting Department (Accounting)		Company\Read Only
🗑️ 🗑️ 🗑️ 👤	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.

 A screenshot of the "Permission" window showing a list of permissions. The table has three columns: "User or Group", "Functional Name", and "Permission Level".

	User or Group	Functional Name	Permission Level
🗑️ 👤	Administration Group (\$Administrators)		Company\Full Access
🗑️ 👤	System Service Group (\$System Services)		Company\Full Access
🗑️ 👤	Accounting Department (Accounting)		Company\Read Only
🗑️ 🗑️ 🗑️ 👤	Administration Group (\$Administrators)		Company\Full Access
🗑️ 🗑️ 🗑️ 👤	System Service Group (\$System Services)		Company\Full Access
🗑️ 🗑️ 🗑️ 👤	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.

	User or Group	Functional Name	Permission Level
	Administration Group (\$Administrators)		Company\Full Access
	System Service Group (\$System Services)		Company\Full Access
	Accounting Department (Accounting)		Company\Read Only
	Administration Group (\$Administrators)		Company\Full Access
	System Service Group (\$System Services)		Company\Full Access
	Accounting Department (Accounting)		Company\Read Only
	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.

Grant To	Div./Dept.	From Date	To Date	Permission Level

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

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

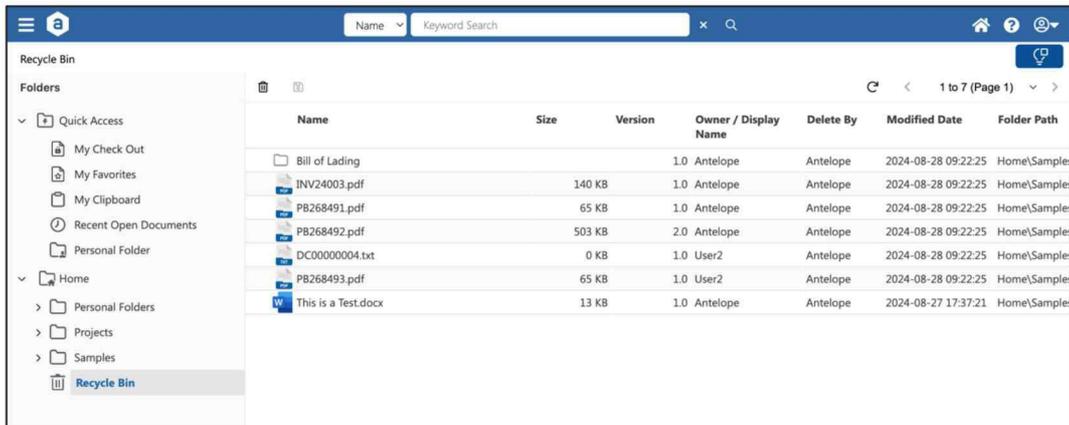
3. Click the blue add icon to commit changes.

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

J. Recycle Bin

I. Recycle Bin View

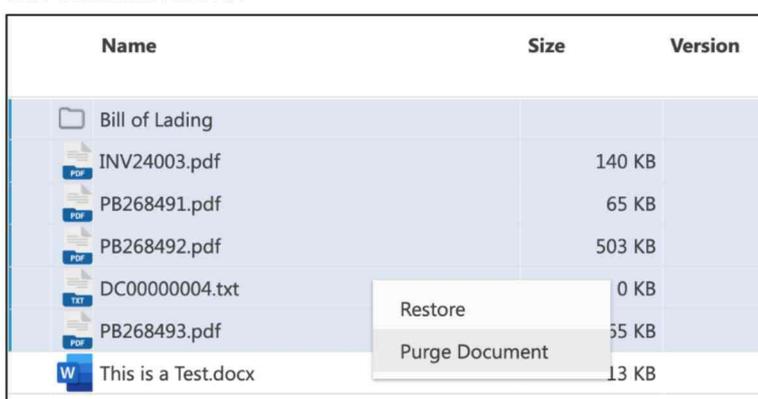
1. To view the recycle bin, click the "Recycle Bin" icon from the folder tree.



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.



- 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.

Name	Size	Version
Bill of Lading		
INV24003.pdf	140 KB	
PB268491.pdf		
PB268492.pdf		
DC00000004.txt	0 KB	
PB268493.pdf	65 KB	
This is a Test.docx	13 KB	

II. Folder Recycle Bin

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

File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.
INV24001.pdf	139 KB	1.0	2024-06-28 12:51:07	Antelope	#123	
INV24002.pdf	140 KB	1.0	2024-06-28 12:51:08	Antelope		
INV24003.pdf	140 KB	1.0	2024-08-20 11:54:16	Antelope		

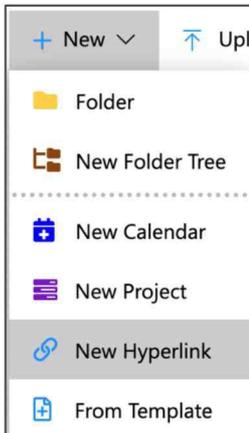
- This will show all document(s) which are deleted within the selected folder.

Name	Size	Version	Owner / Display Name	Delete By	Modified Date	Folder Path
This is a Test.docx	13 KB	1.0	Antelope	Antelope	2024-08-27 17:37:21	Home/Samples

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”.

A screenshot of a 'New Hyperlink' dialog box with a blue header and a 'Create' button. It contains two input fields: 'URL Name' with the text 'Google' and 'URL Address' with the text 'https://www.google.com'.

4. Click “Create” button to save.



	File Name	Size	Version	Version Date
<input checked="" type="checkbox"/>	Google		1.0	2024-08-28 21:58:22

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.

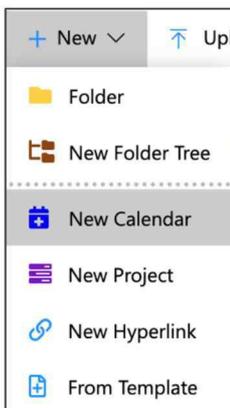


2. A pop-up message will ask for confirmation. Click “OK” to commit.

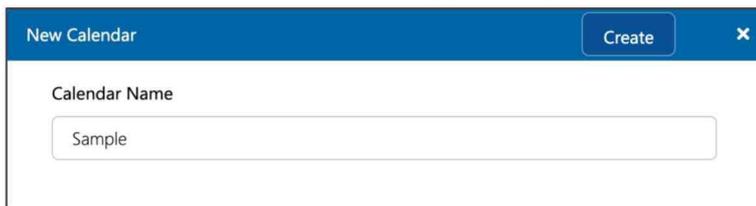
L. Calendar

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”.



New Calendar Create ×

Calendar Name

Sample

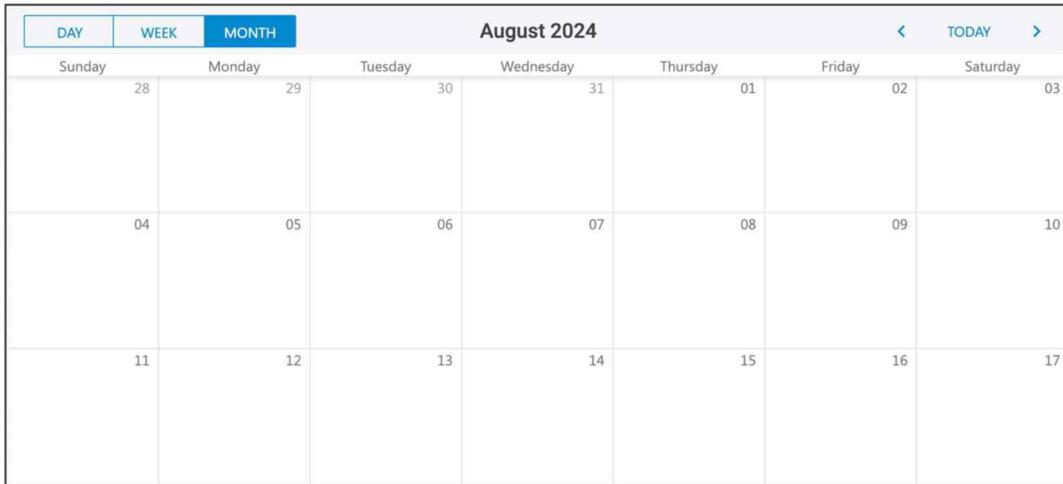
4. Click “Create” button to save.



	File Name	Size	Version	Version Date
<input type="checkbox"/>	Sample		1.0	2024-08-28 22:28:26

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.

00:00 - 00:00
NEW EVENT

Type Task

Description New event

Assign To admin

Status Active

Work

Complete Ratio

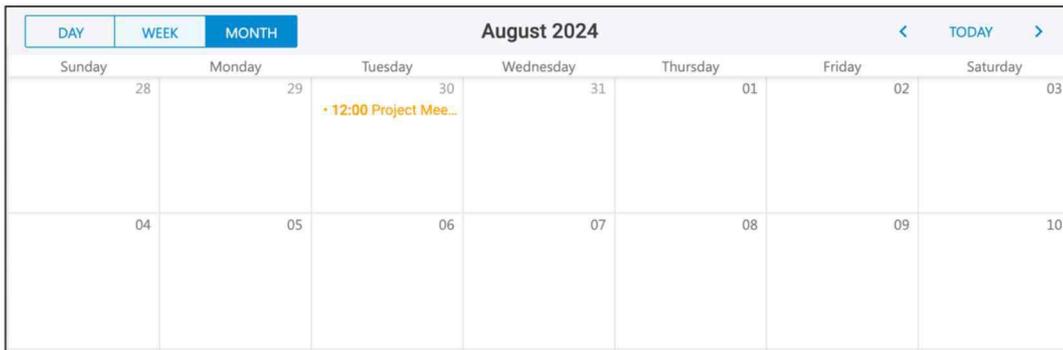
Full day

🕒
00:00
▼
30
▼
July
▼
2024
▼

🕒
00:00
▼
31
▼
July
▼
2024
▼

CANCEL
SAVE

3. Click “Save” button to commit changes.



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
PROJECT MEETING

Type: Activity ▼

Description:

Participants:
admin ✓

Location:

Full day

▼
 ▼
 ▼
 ▼

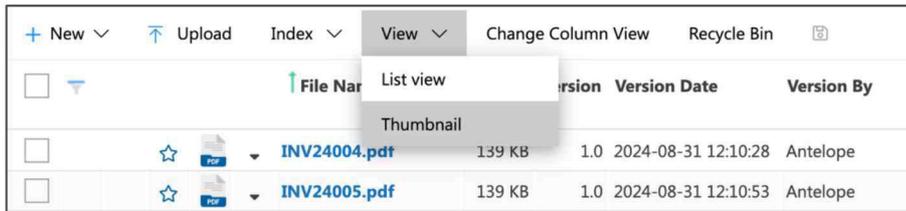
▼
 ▼
 ▼
 ▼

DELETE
CANCEL
SAVE

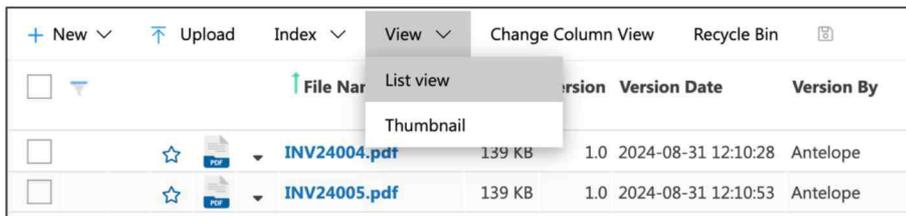
M. Document List

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.

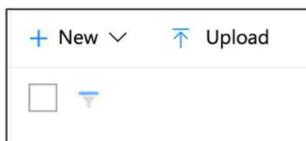


3. The documents are shown in thumbnail.
4. To change back to document list view, from the document list toolbar, click View > List View.

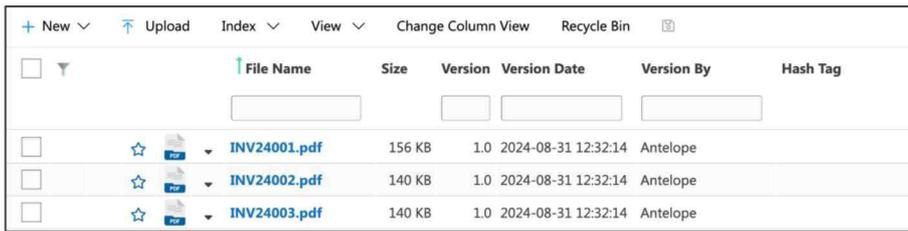


II. Column Filter

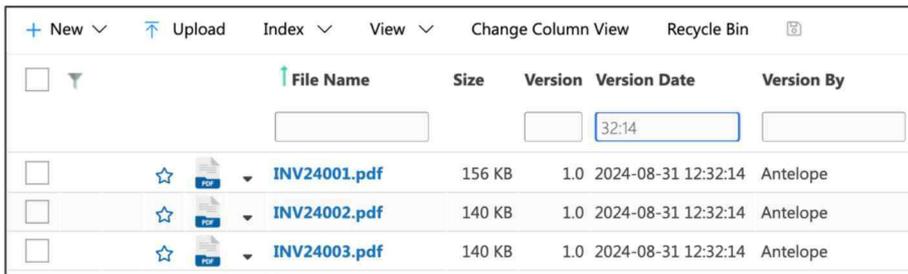
1. Apart from document full-text search and advanced search, you can also perform a quick searching using column filter.
2. From the document list, click the icon.



3. The column filter will appear.



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

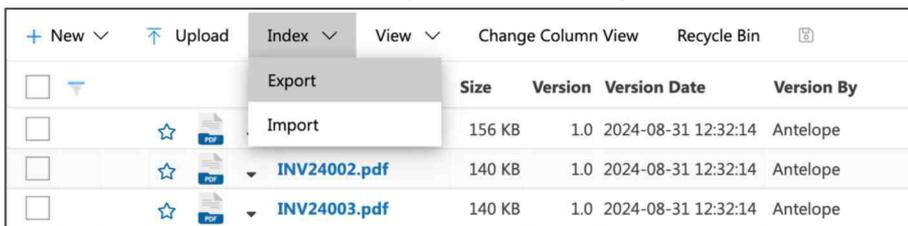


5. The following data type cannot be searched by column filter: Hashtag, Details Line Items, Date Range (e.g. 2024-08-12 to 2024-08-30).

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"

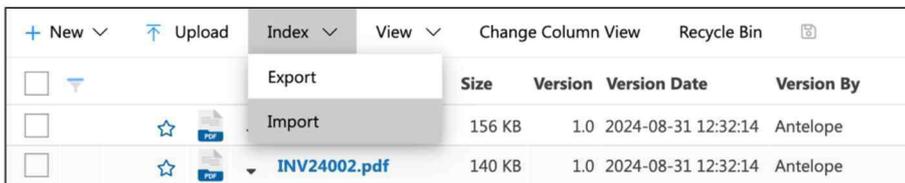
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ID	File Name	Size	Version	Version Date	Version By	Hash Tag	Invoice No.	Invoice Date	PO No.	Due Date	Supplier Name	Total Amount	Line Items
2	2737	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
3	2735	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
4	2736	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope							0.0000	Details
5	2739	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
6	2738	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
7	2740	INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
8	2743	INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
9	2741	INV24008.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
10	2742	INV24009.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope							0.0000	Details
11	2744	INV24010.pdf	138 KB	1.0	2024-08-31 12:32:16	Antelope							0.0000	Details
12	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.

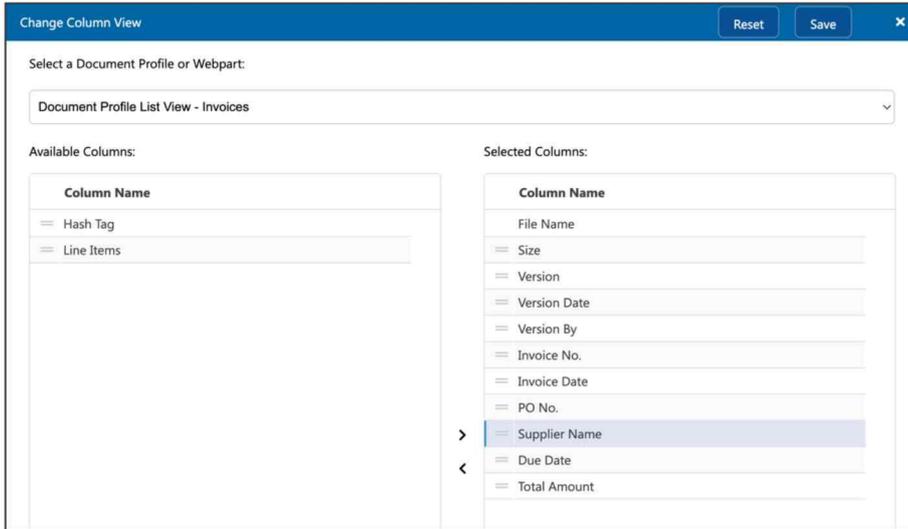


4. The document list is indexed automatically.

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.

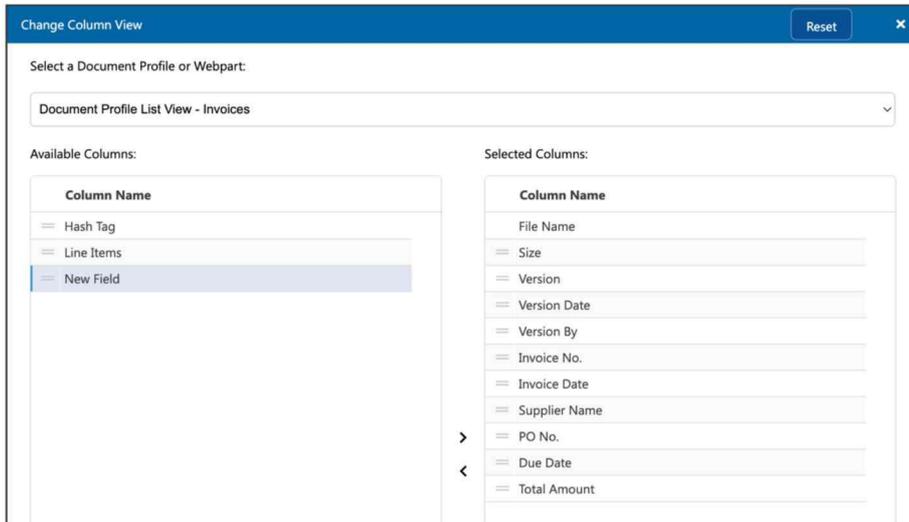
5. The document list columns will re-order for the selected folder of your own user account according to your setting.

		File Name	Size	Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name	PO No.
<input type="checkbox"/>		INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company	PO12345
<input type="checkbox"/>		INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company	PO12346
<input type="checkbox"/>		INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope				
<input type="checkbox"/>		INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope				
<input type="checkbox"/>		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.



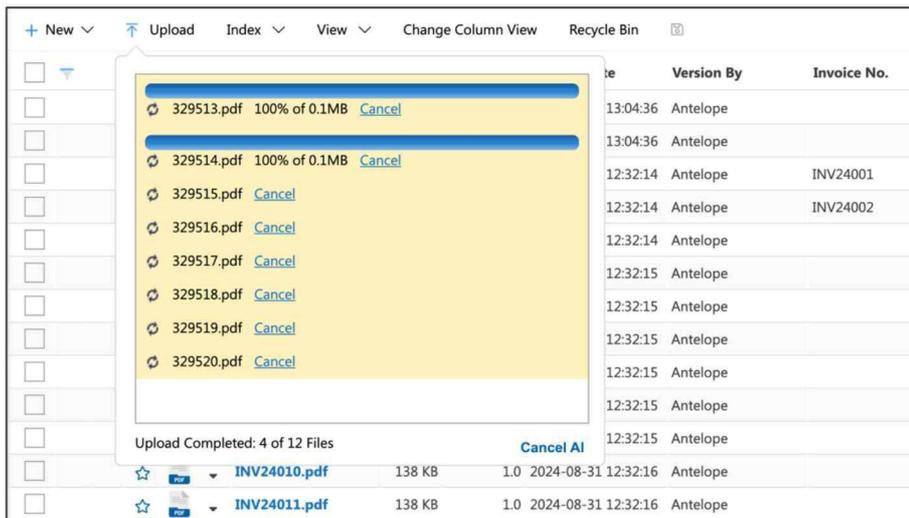
7. Pay attention that since you have customized the folder display setting, in case your system administrator has added a new index field, your folder document list will not reflect this new setting until you make another “Reset” or “Configuration” of your column view.



N. Document

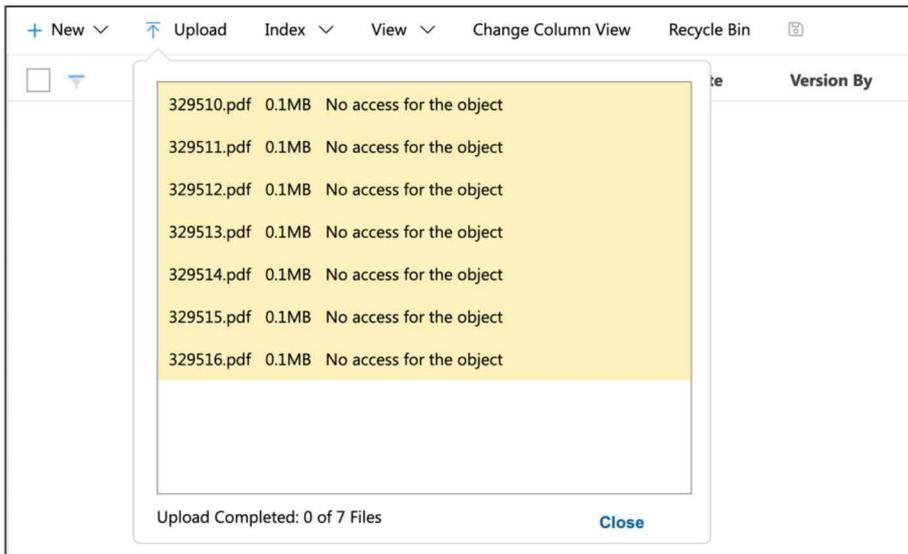
I. Upload Document

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

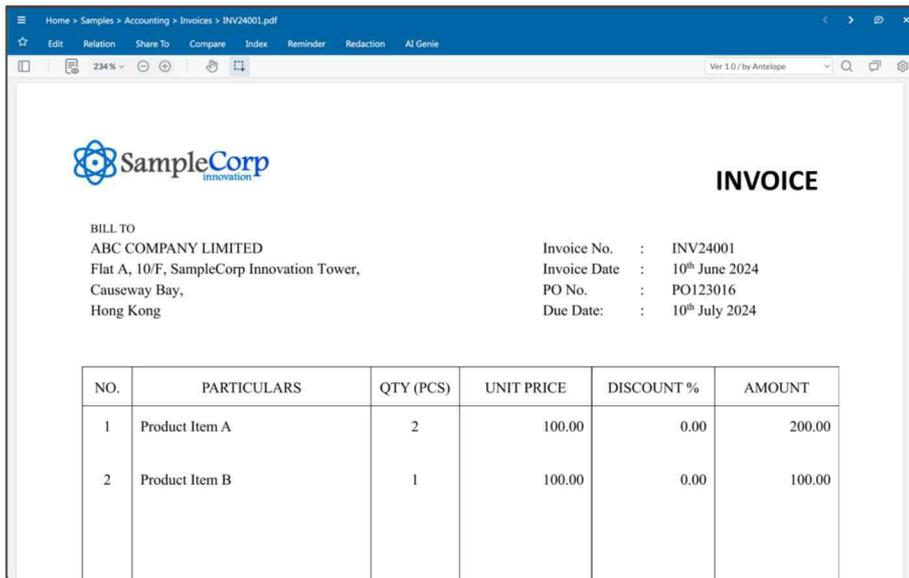
1. To preview a document, click the document name.

			File Name	Size	Version	Version Date	Version By	Invoice No.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope	

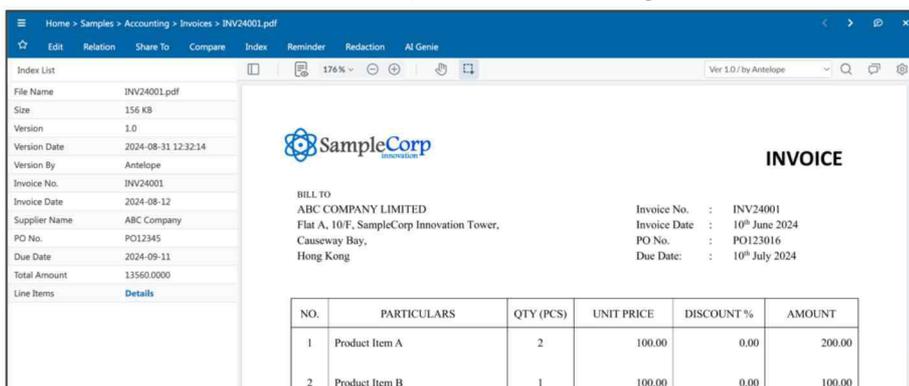
2. Click Preview button.



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.



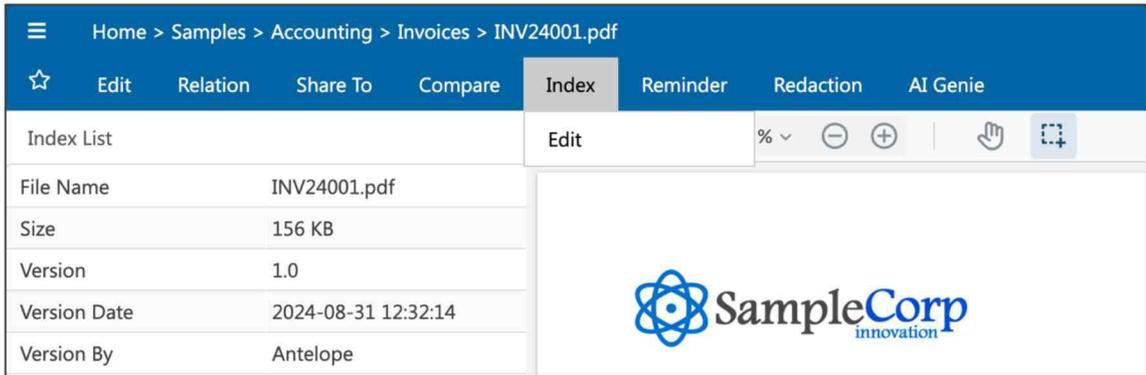
5. The following document type can be previewed on screen by default:

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

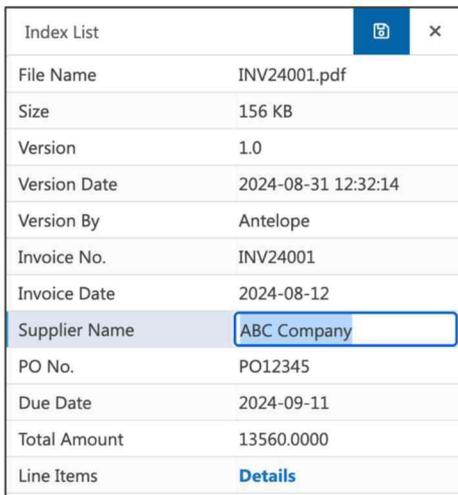
6. Note: The maximum size for document preview is 20 Mb.

III. Index Field

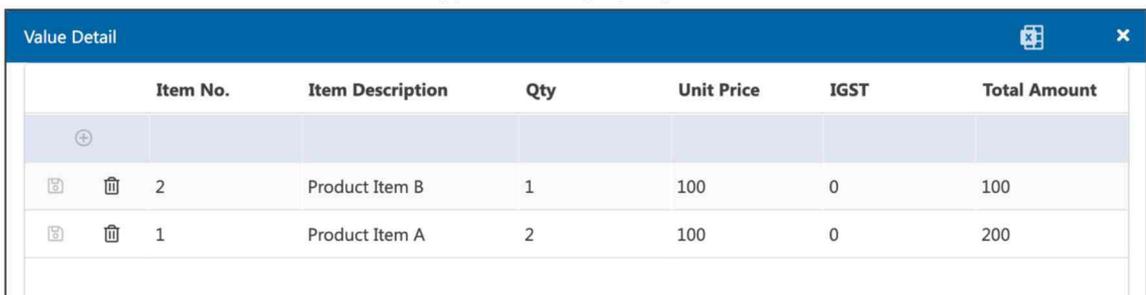
1. To index a document, from the document viewer toolbar, select Index > Edit.



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.

			Size	Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name
<input checked="" type="checkbox"/>			156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company
<input checked="" type="checkbox"/>			140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company
<input checked="" type="checkbox"/>			140 KB	1.0	2024-08-31 12:32:14	Antelope			
<input checked="" type="checkbox"/>			139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input checked="" type="checkbox"/>			139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			140 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			139 KB	1.0	2024-08-31 12:32:15	Antelope			

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

			File Name	Size	Version	Version Date	Version By	Invoice No.	Invoice Date	Supplier Name
<input type="checkbox"/>			INV24001.pdf	156 KB	1.0	2024-08-31 12:32:14	Antelope	INV24001	2024-08-12	ABC Company
<input type="checkbox"/>			INV24002.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24002	2024-08-13	DEF Company
<input checked="" type="checkbox"/>			INV24003.pdf	140 KB	1.0	2024-08-31 12:32:14	Antelope	INV24003		
<input type="checkbox"/>			INV24004.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			INV24005.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			INV24006.pdf	139 KB	1.0	2024-08-31 12:32:15	Antelope			
<input type="checkbox"/>			INV24007.pdf	140 KB	1.0	2024-08-31 12:32:15	Antelope			

IV. Check-Out and Edit

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

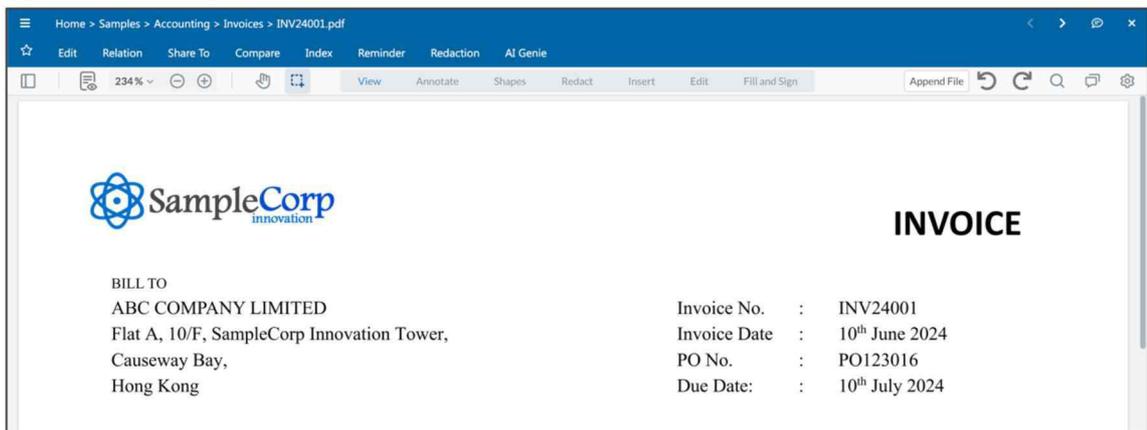
Property	Value
Invoice No.	INV24001
Invoice Date	2024-08-12
Supplier Name	ABC Company
PO No.	PO12345
Due Date	2024-09-11
Total Amount	13560.0000

BILL TO
 ABC COMPANY LIMITED
 Flat A, 10/F, SampleCorp Innovation Tower,
 Causeway Bay,
 Hong Kong

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.

	File Name	Size	Version	Version Date	Version By
	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

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



V. Document Viewer Annotation

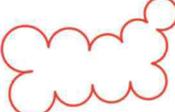
1. All electronic documents upload to Antelope 6 will have a PDF file rendered for online preview and annotation purpose. The annotation tool contains the following features that you can perform on the document preview version.

a. Annotate

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

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

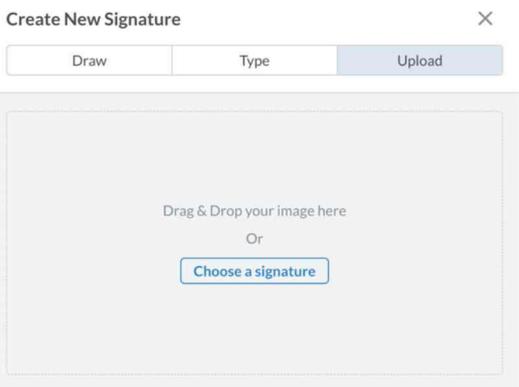
b. Shapes

Icon	Feature	Description / Sample
	Free Hand	BILL TO ABC COMPANY 
	Free Hand Highlight	
	Rectangle	
	Ellipse	
	Polygon	
	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 
	Redact entire page	All redaction will be marked permanent and saved as another version.
	Redaction Panel	

d. Insert

Icon	Feature	Description / Sample
	Signature by Drawing	
	Signature by Type	
	Signature by Upload image	
	Stamp (Standard)	

	<p>Stamp (Custom)</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: right; margin: 0;">Create New Stamp ×</p> <div style="text-align: center; margin: 10px 0;">  </div> <p>Stamp text <input type="text" value="Draft"/></p> <p>Font style <input type="text" value="Helvetica"/> B <i>I</i> <u>U</u> A</p> <p>Text color <input type="radio"/> <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p> <p>Background color <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></p> <p>Timestamp text <input checked="" type="checkbox"/> Username <input checked="" type="checkbox"/> Date <input checked="" type="checkbox"/> Time</p> <p>Date format <small>⌵</small> <input type="text" value="DD/MM/YYYY h:mm A"/></p> </div>
	<p>Image</p>	<p>Either JPG or PNG format.</p>
	<p>File Attachment</p>	<p>Attach any electronic file, double click to download BILL TO ABC COMPANY LIMITED </p>
	<p>Call Out</p>	<p>BILL TO  Insert text here ABC COMPANY LIMITED</p>

e. Edit

Icon	Feature	Description / Sample
	<p>Crop Page</p>	

f. Fill and Sign

Icon	Feature	Description / Sample
	<p>Signature</p>	<p>Please refer to section V (d)</p>
	<p>Free Text</p>	<p>Please refer to section V (a)</p>
	<p>Cross</p>	<p>Paste a cross on a form.</p>
	<p>Tick</p>	<p>Paste a tick on a form.</p>
	<p>Dot</p>	<p>Paste a dot on a form.</p>
	<p>Stamp</p>	<p>Please refer to section V (d)</p>

	Calendar	BILL TO ABC COMPANY LIMITED 2024-08-31
---	----------	--

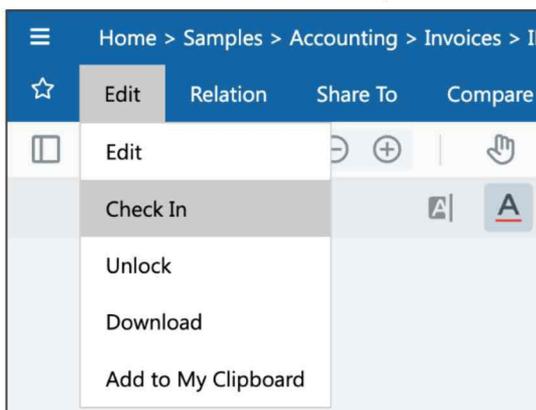
g. Other Features

Icon	Feature	Description / Sample
	Panel	View page thumbnails, outlines and signature list.
	Control	<ul style="list-style-type: none"> ● View document as continuous page / page by page. ● Page rotation ● Page layout as single page / double page
234% ▾	Zooming	<ul style="list-style-type: none"> ● Page zoom by percentage ● Zoom to width, zoom to height ● Marquee Zoom
	Menu	<ul style="list-style-type: none"> ● Full screen ● Download PDF with / without annotation
	Search	Search within the PDF file.

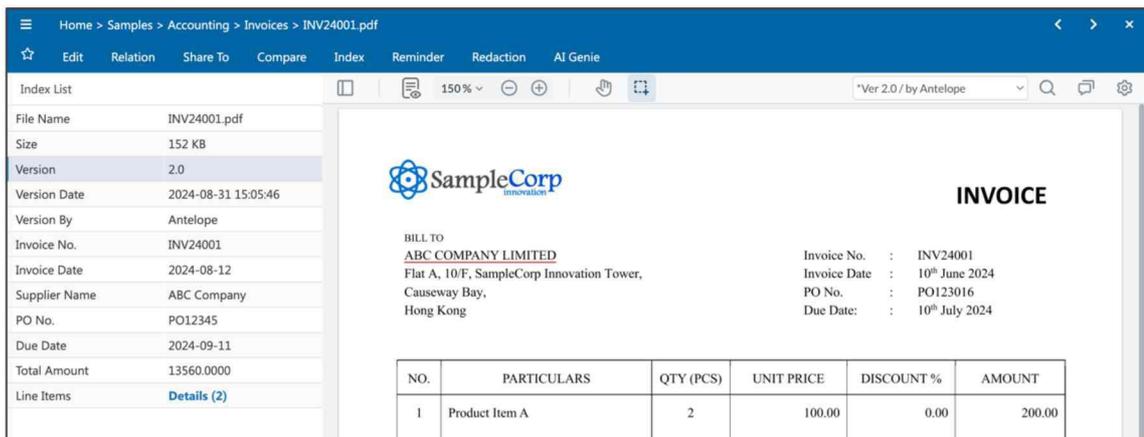
Note: For other documents like Microsoft® Office, CAD drawing, any annotation applied are only placed on the document preview version, it will not alert any of the original document.

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.

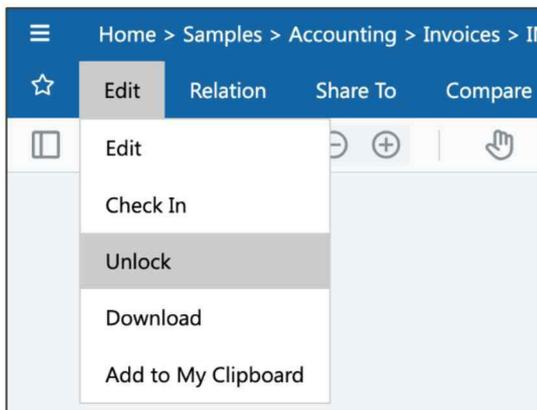


- The document is now saved as a new version.



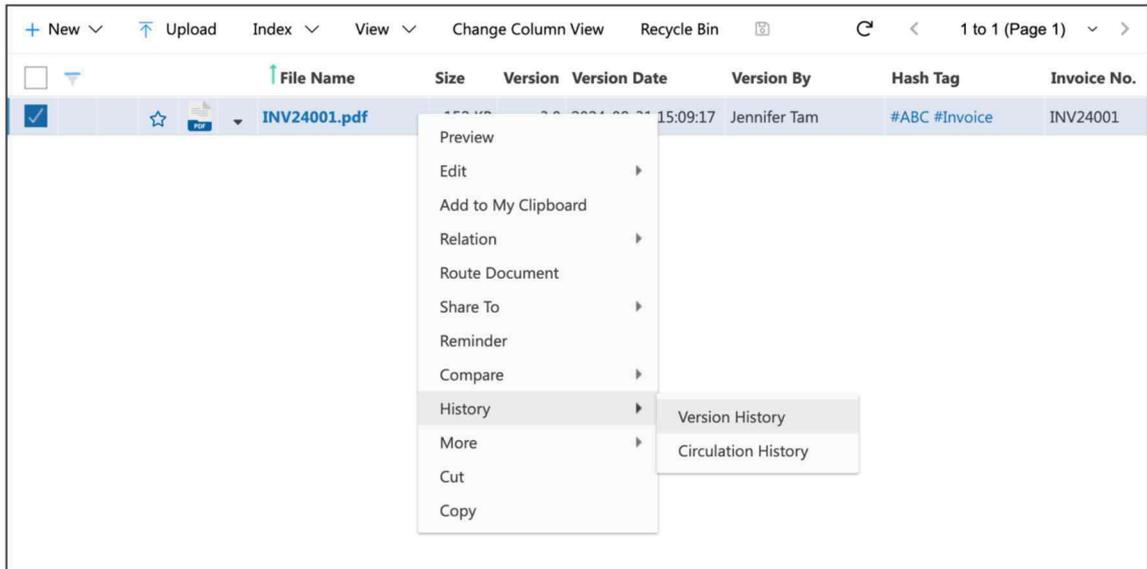
NO.	PARTICULARS	QTY (PCS)	UNIT PRICE	DISCOUNT %	AMOUNT
1	Product Item A	2	100.00	0.00	200.00

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

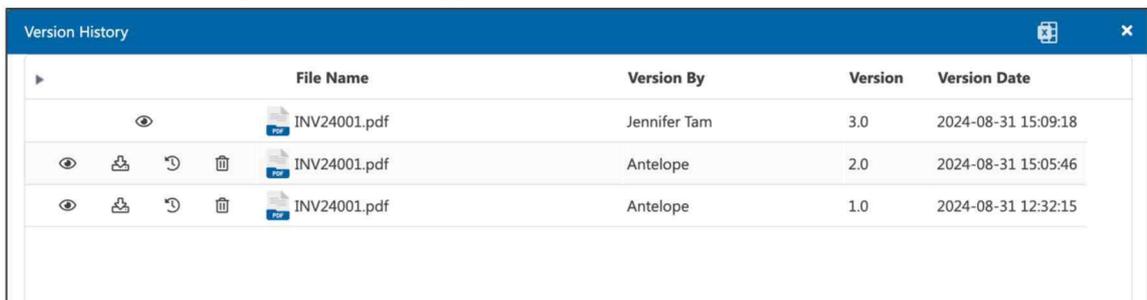


VII. Document Version

- A document will have version increment either by one of the following actions:
 - A new document is uploaded and overwrite the original one.
 - Annotation is applied on the document preview.
 - The document is check-out for content editing and check-in again.
 - A scanned document is uploaded and converted into searchable PDF.
- 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. 🗑️

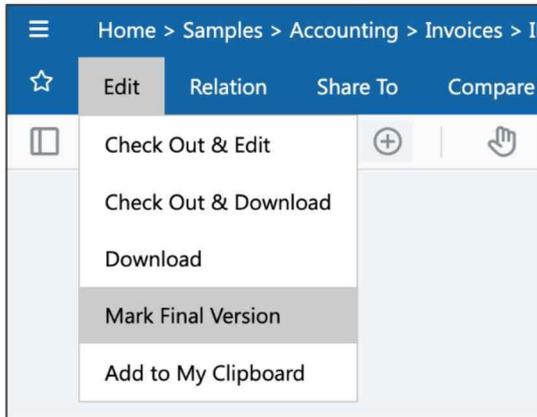


5. You can also restore the older version of document as the latest one by clicking the restore icon. 🔄

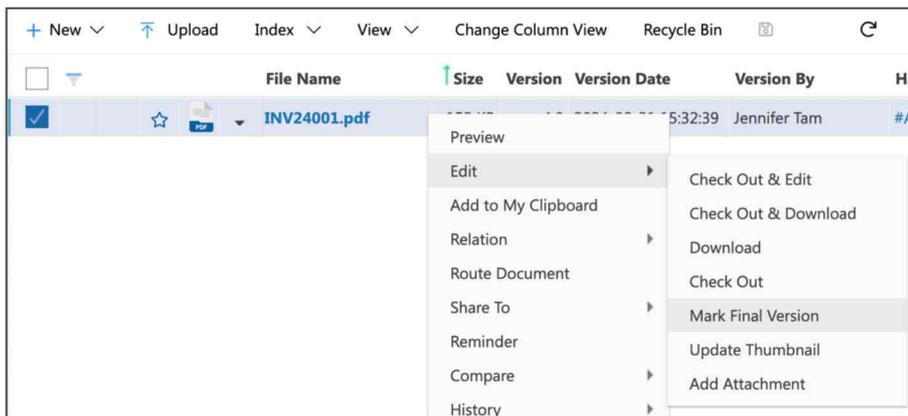


VIII. Mark and Revert Final Version

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



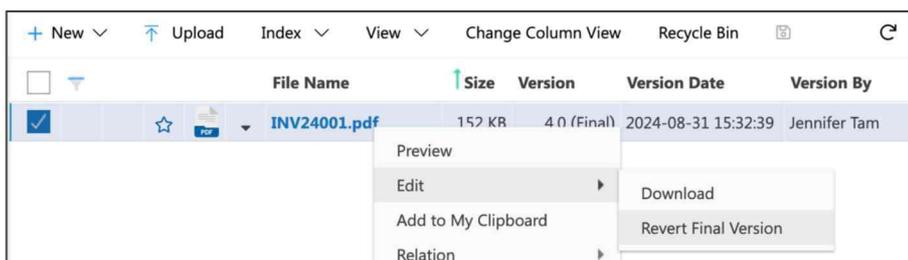
2. You can also mark as final version by bring up the context menu, select Edit > Mark Final Version.



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

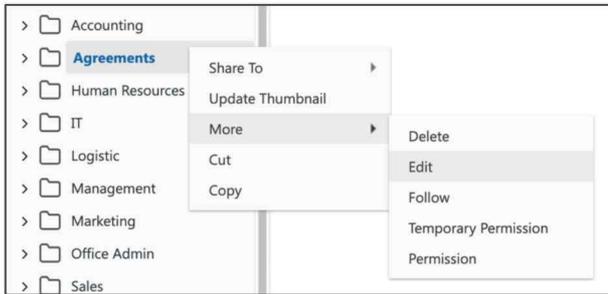


4. User with only manage rights or the document owner can revert the final version back to edit mode.

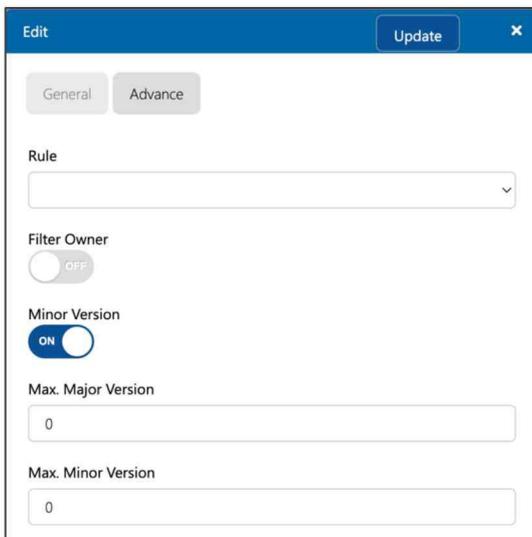


IX. Minor Version Update

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.

	File Name	Size	Version	Version Date
<input checked="" type="checkbox"/>	Non-disclosure agreement.docx	85 KB	0.1	2024-09-01 01:28:31
<input type="checkbox"/>	Non-disclosure agreement.pdf	76 KB	1.0	2024-06-21 15:07:06
<input type="checkbox"/>	Real Estate Purchase Agreement.pdf	227 KB	1.0	2024-06-28 13:28:14

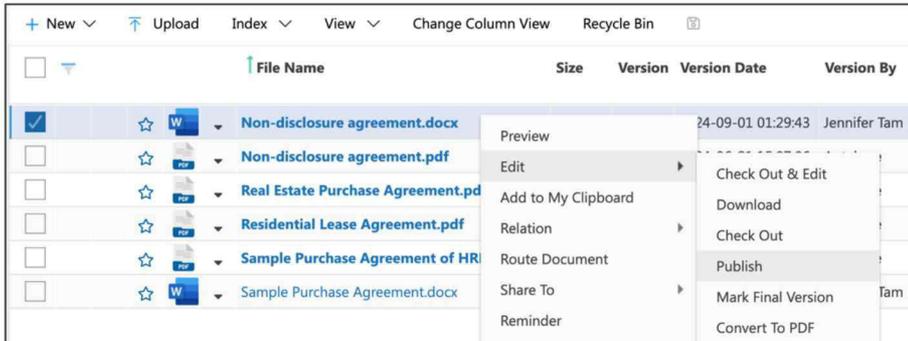
4. Whenever there are any changes, the version number will increment by 0.1.

	File Name	Version By	Version	Version Date
<input type="checkbox"/>	Non-disclosure agreement.docx	Jennifer Tam	0.2	2024-09-01 01:29:43
<input type="checkbox"/>	Non-disclosure agreement.docx	Jennifer Tam	0.1	2024-09-01 01:28:32

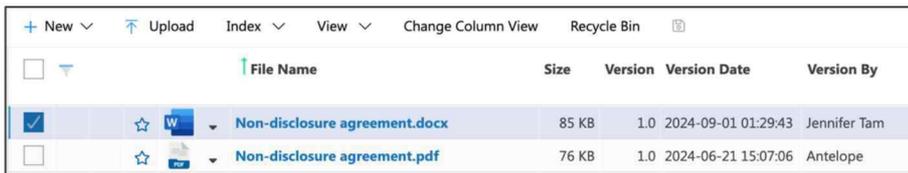
Note: User accounts without “manage” permission on the folder are not able to see the minor version of any documents, except the document owner himself/herself.

X. Publish Version

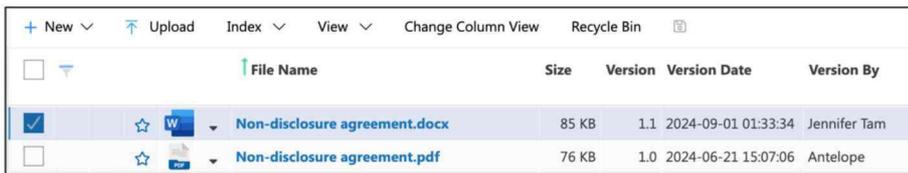
1. To public a minor version of document as major version, select the document, right click to bring up the context menu, then select “Edit > Publish”.



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.

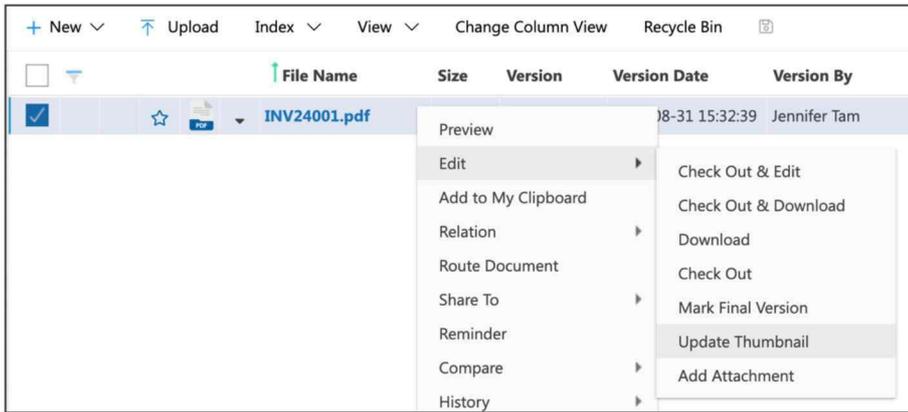


4. Until the document is published to major version.

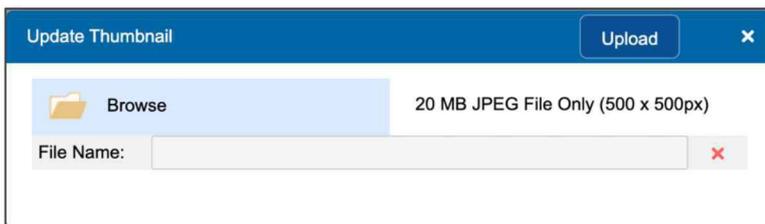


XI. Update Thumbnail

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.



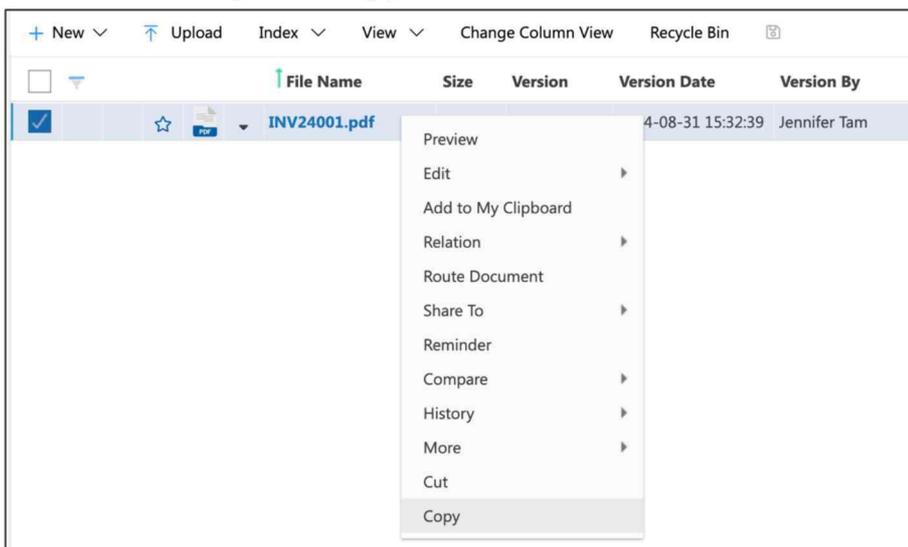
3. The Update Thumbnail window will appear. Browse for JPG file with recommend resolutions of 500 x 500 pixels, then click “Upload” button.



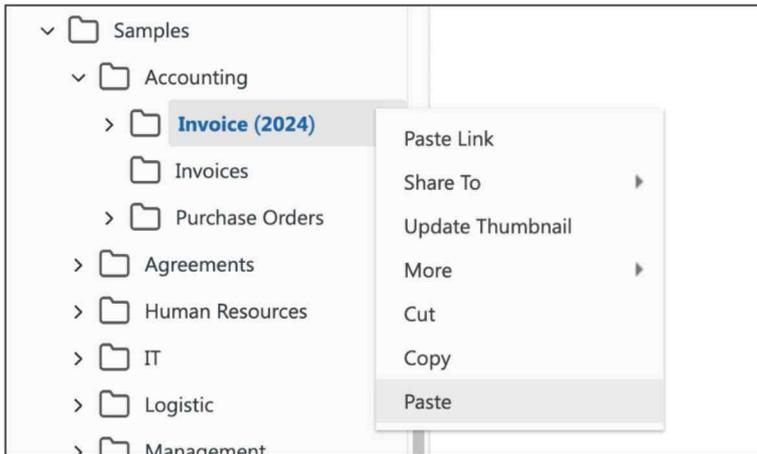
4. Click the blue Upload button to commit changes.

XII. Copy Document

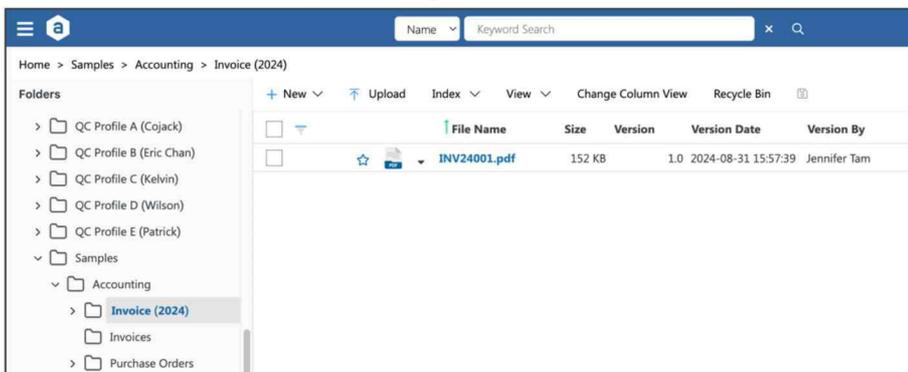
1. To copy a document, select the document from the document list, right click to bring up the context menu, select Copy.



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

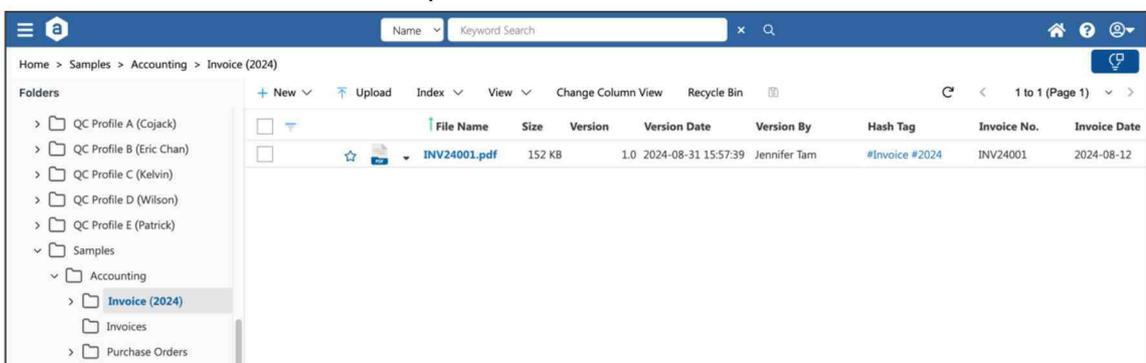


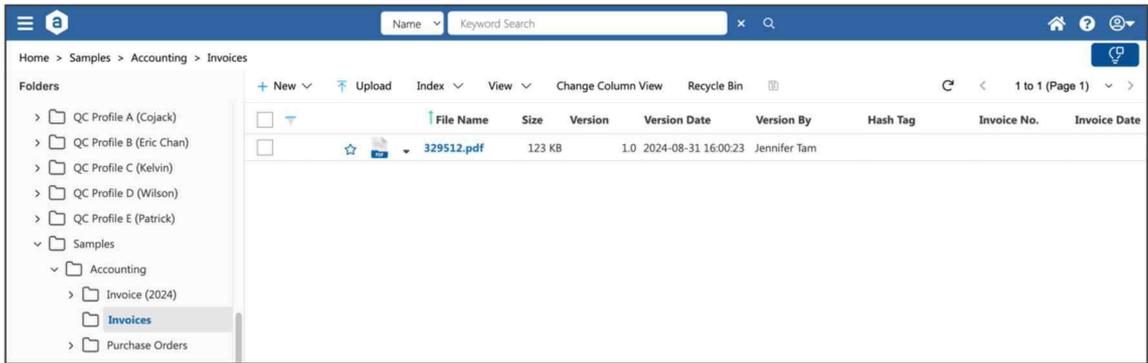
- Both the document and index are pasted in the destination folder. Be notice that only the latest version will be copied and pasted.



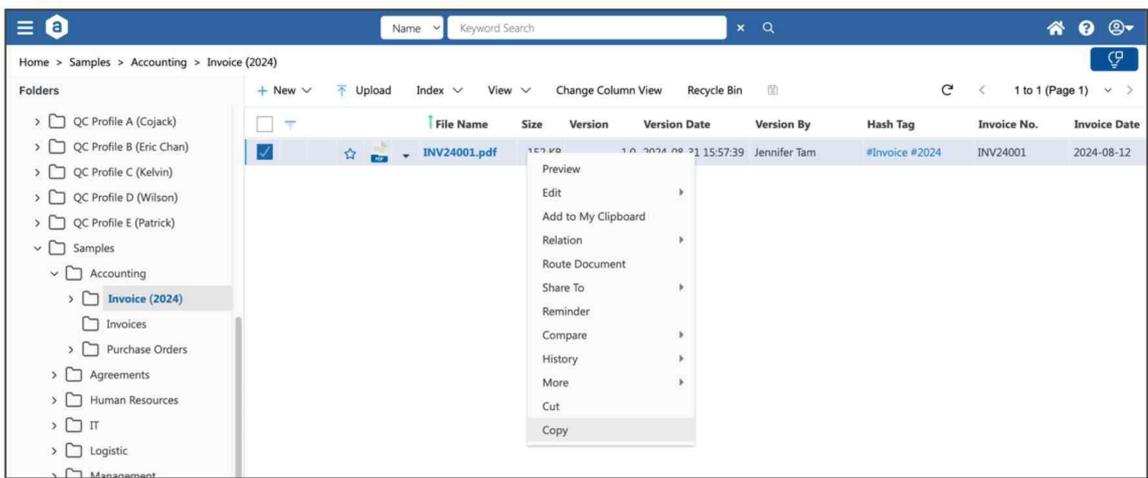
XIII. Copy and Paste Index

- 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.

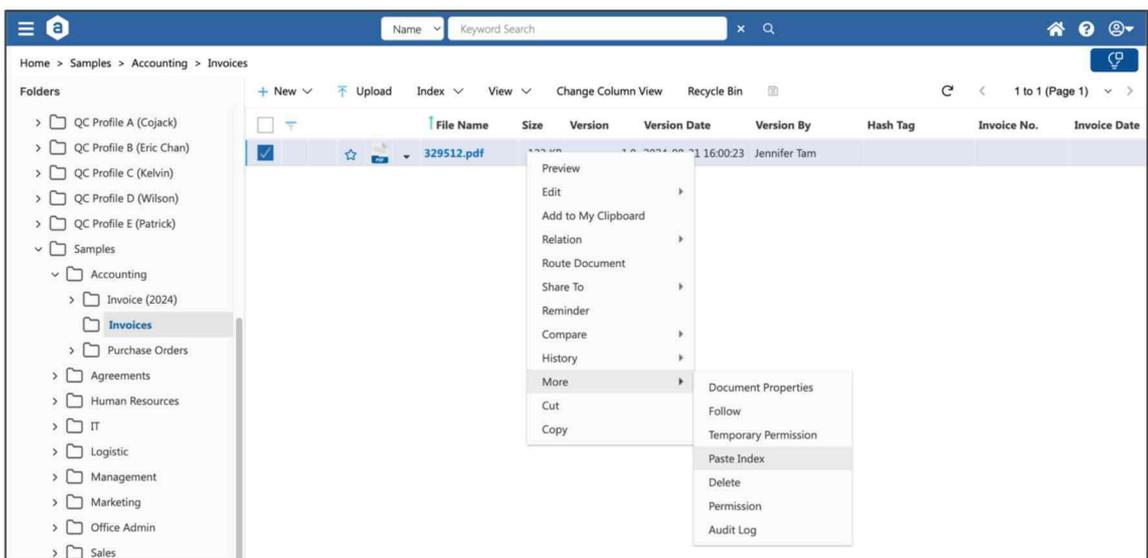




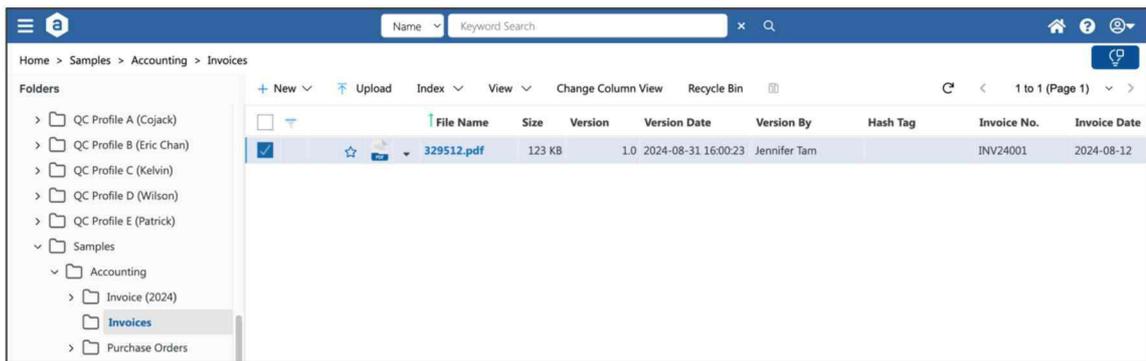
2. Copy the source document.



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

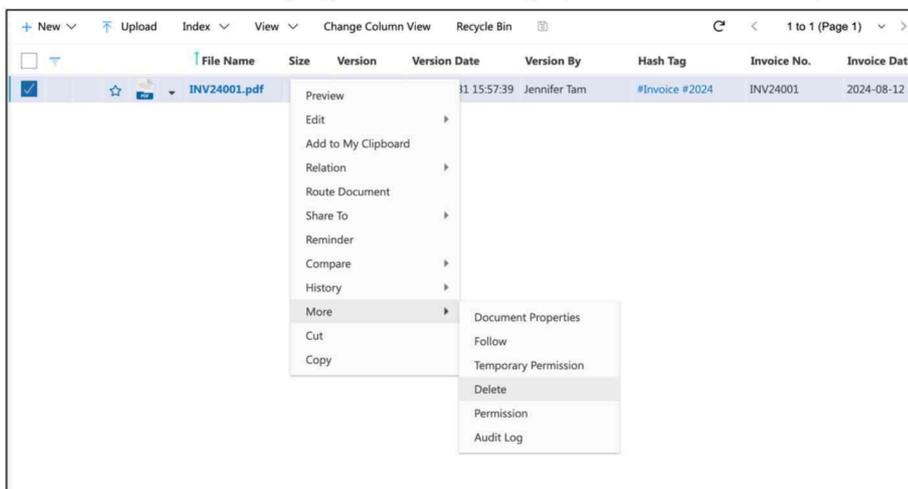


- The destination document is now indexed with the original one.



XIV. Delete Document

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



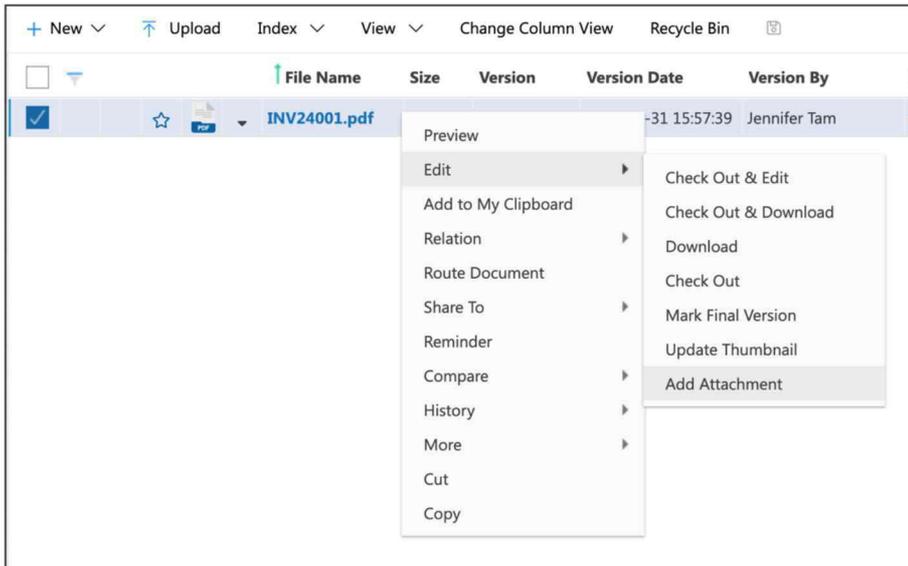
- A confirmation message will ask you for deleting. Choose Yes. The document will be put into Recycle Bin.

XV. Move Document

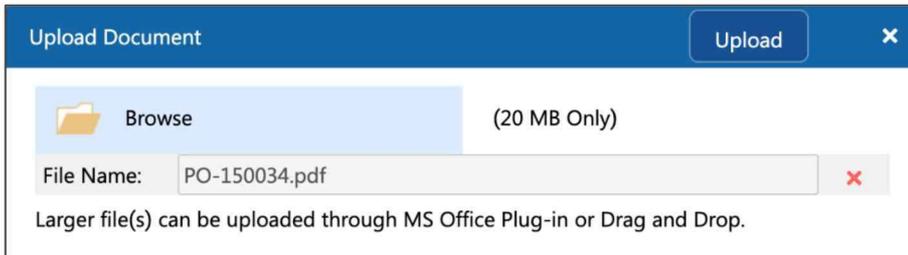
- To move a document, drag and drop the document(s) from one folder to another. Bear in mind that you cannot drag either folder or document to the root (e.g. Home).
- If the document profile between the source and destination folders are difference, some document index may not be able to inherit.

XVI. Add Attachment

- 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.

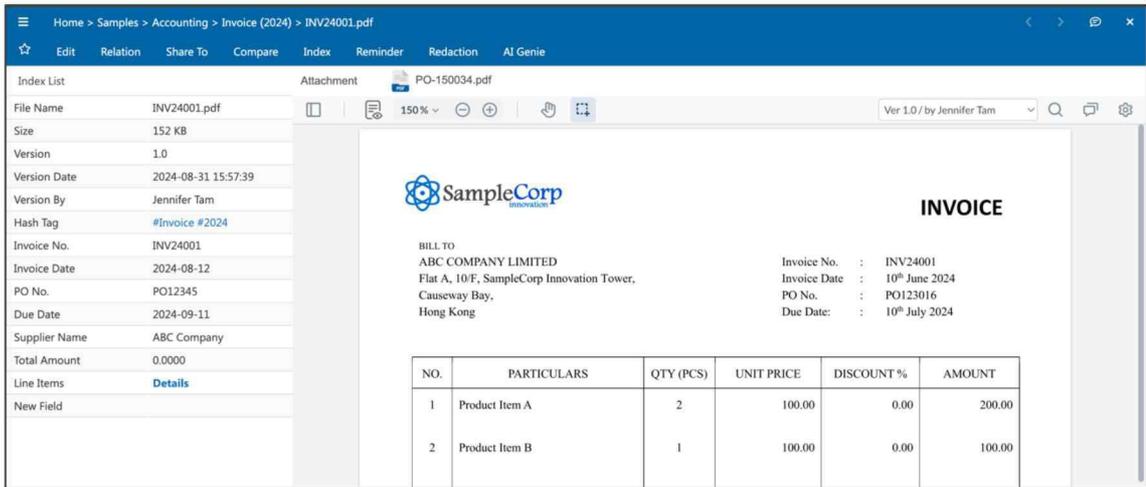


3. A clip icon will appear in the document. You can add multiple attachments to a single document.

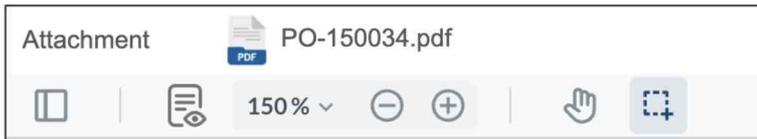


XVII. View Attachment

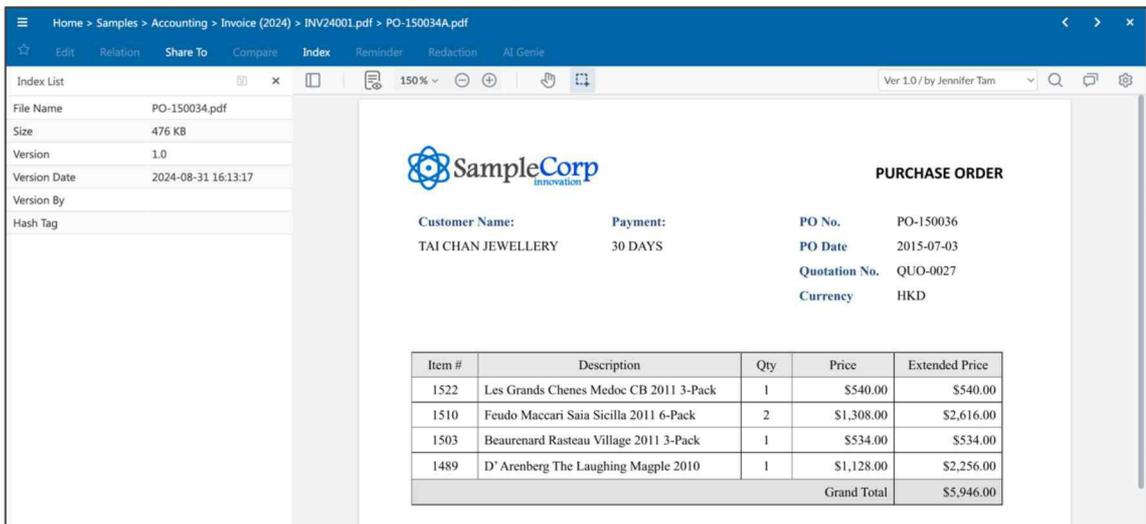
1. To view the attachment, open the document for preview.



2. The attachment is display above the annotation toolbar.



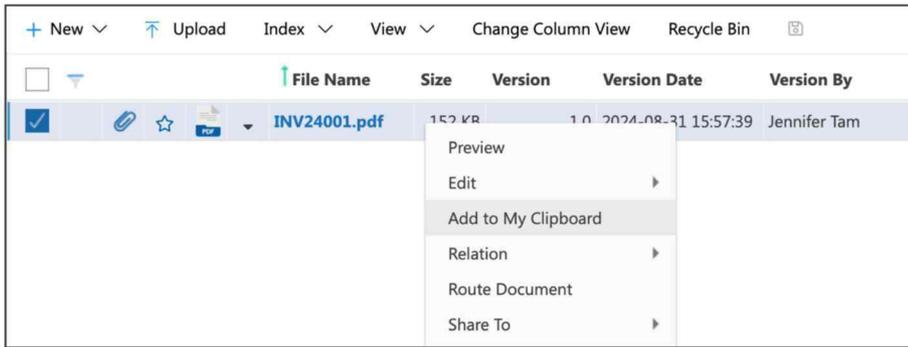
3. Click the attachment name to open for preview.



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.

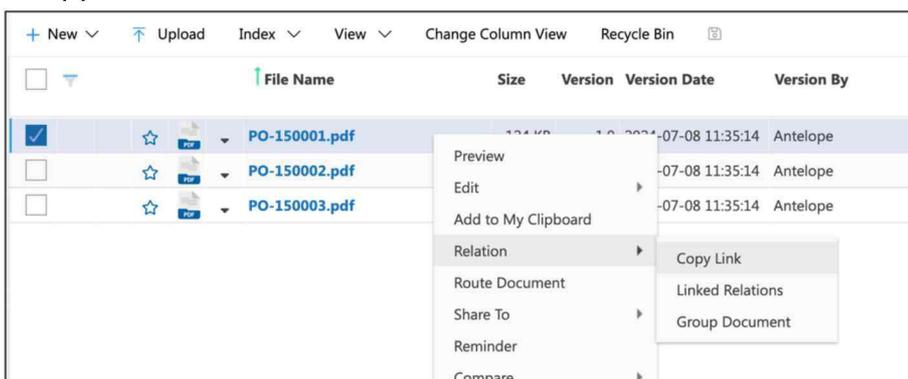


Note: My Clipboard only stores documents temporarily, like search history. It will be cleared once you refresh your page or log out.

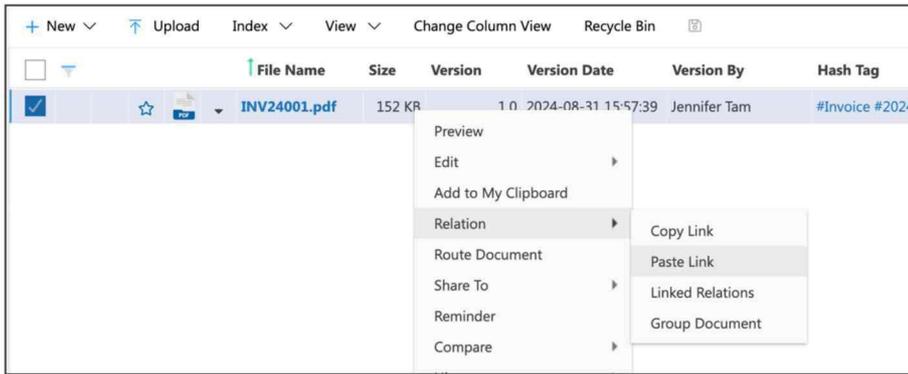
O. Document Relation

I. Copy Link

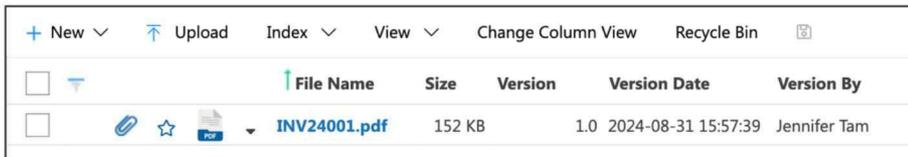
1. To link up two documents, you can use the document link features. For example, if you want to establish a link which “connect” a purchase order to an invoice, select “Relation > Copy Link” from the context menu.



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

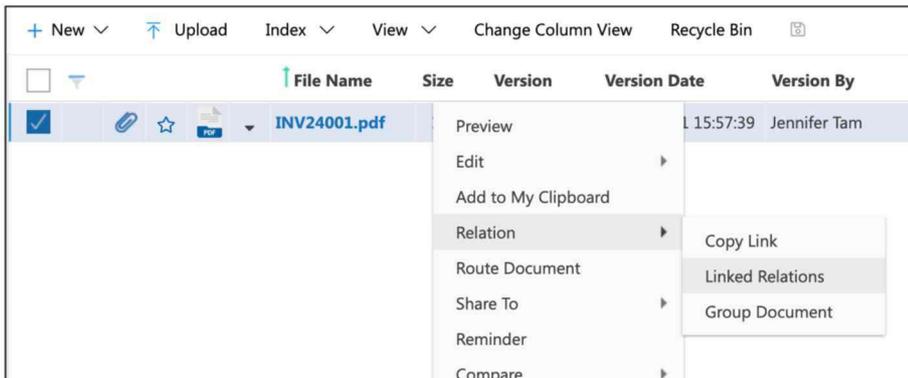


3. A virtual link is established.



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”.



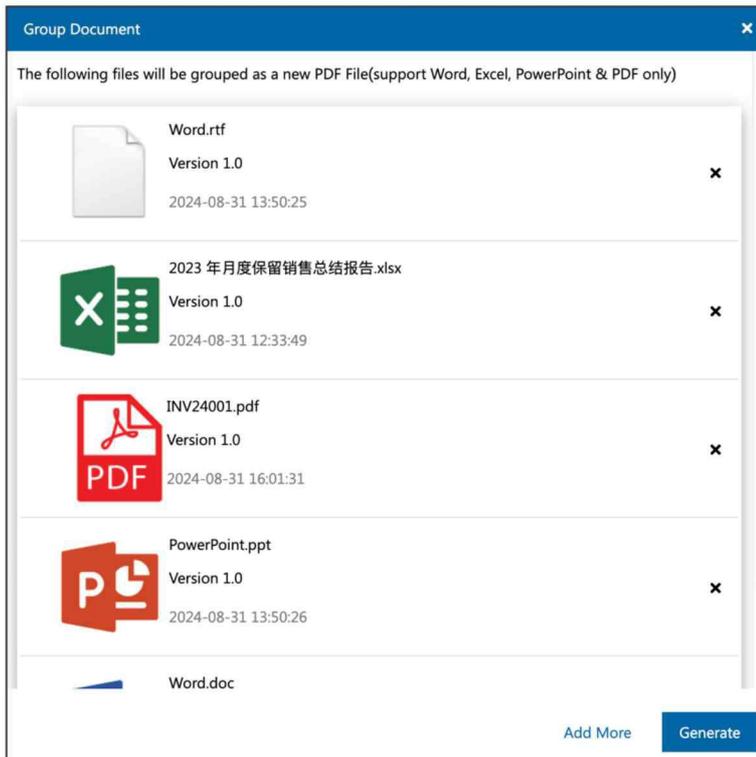
2. The Linked Relations window display all virtual linkage to the document. You can preview, shared and delete the linkage.



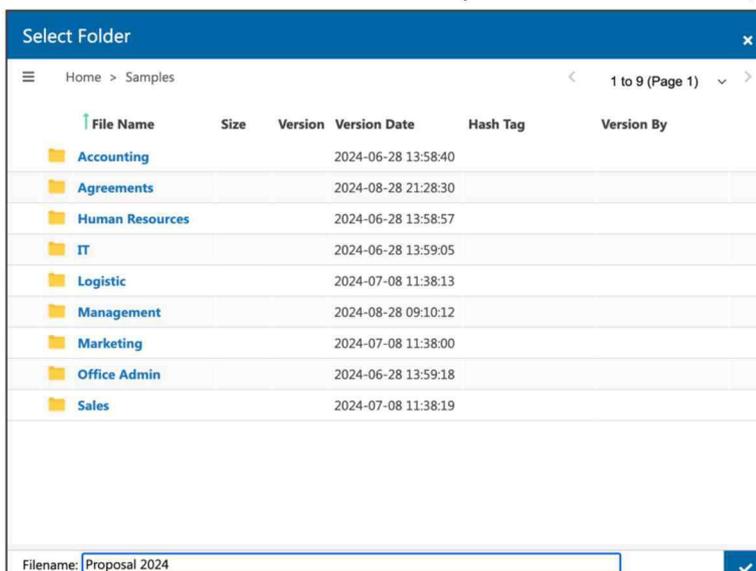
III. Group Document

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.

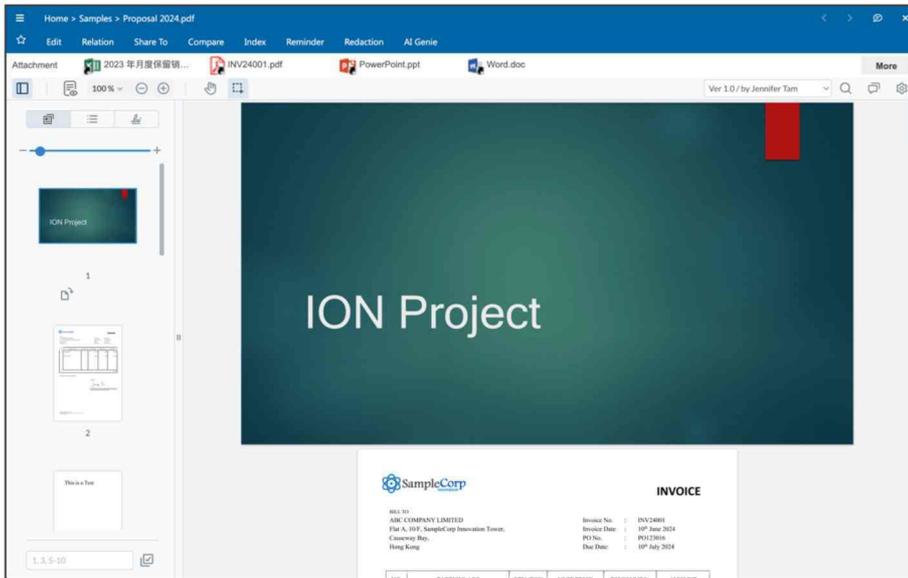
2. Select the documents you want to group together, right click the bring up the context menu, select “Relations > Group Document”.



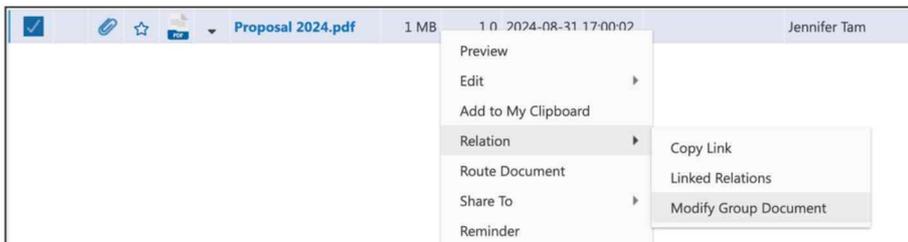
3. Rearrange the document sequence to group, then click the blue “Generate” button.
4. Select the destination folder and input a document name, click the “tick” button to save.



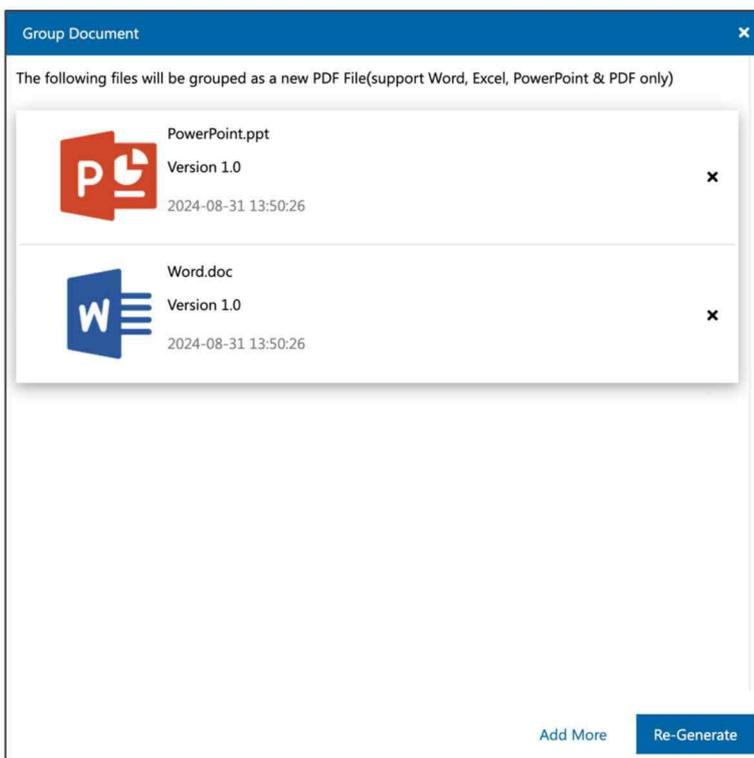
5. Once the document is generated, you can preview the document with thumbnail enabled. All “component documents” are displayed as virtual linkage.



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



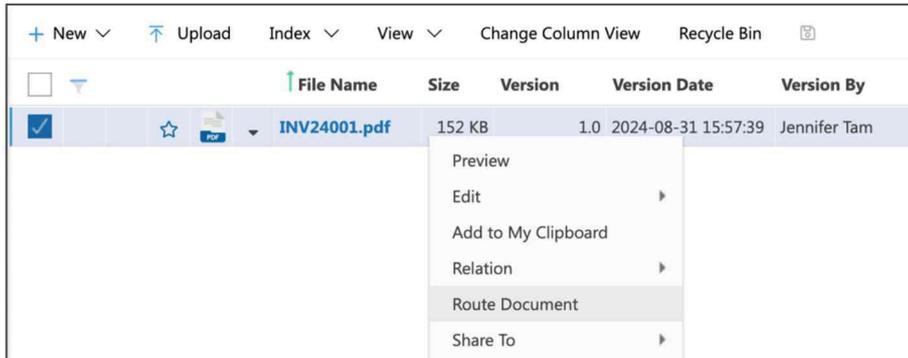
7. In this case, we removed the Excel spreadsheet, RTF file and the PDF. Finally click the blue “Re-Generate” button.



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.

The 'Document Workflow' window has a 'Next' button and a close button. It contains a 'Workflow Template' dropdown set to 'Adhoc routing' and a 'Priority' dropdown set to 'Normal'. There is also a 'To :' field which is currently empty.

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

The 'Document Workflow' window is the same as in the previous step, but the 'To :' field is now populated with the text '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.

- 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

- 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

- 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.

Type: Notification

Scope: Any

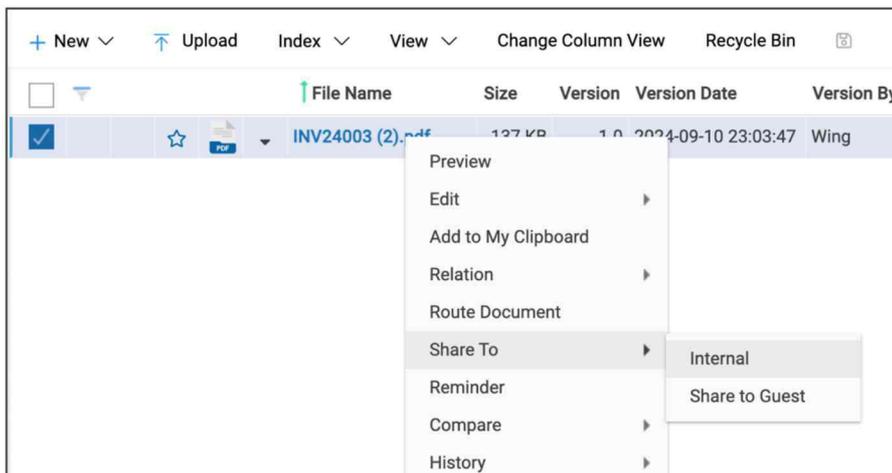
8. In case you want the recipient to receive the document as attachment in the email notification, please check on this option. Bear in mind if the document size is over a certain limit, the recipient email server may not be able to receive.

Include original :

Q. Sharing

I. Share to Internal

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



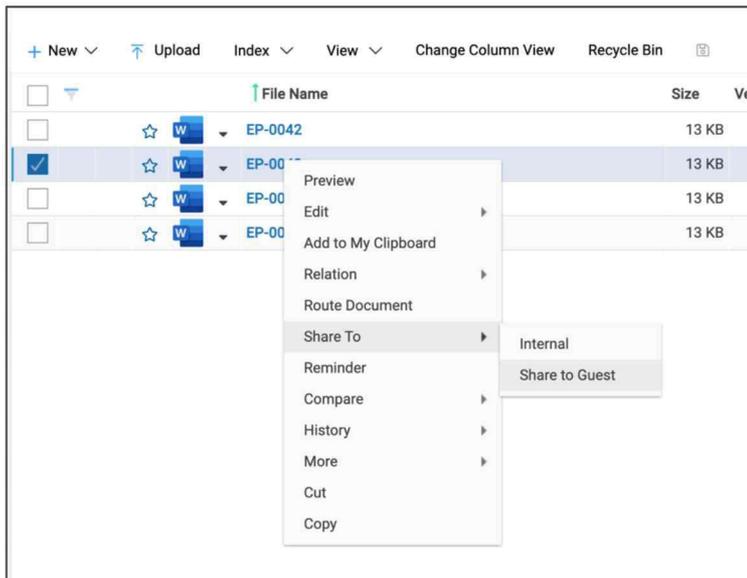
2. Your default email client will bring up with the document link being pasted in the email body, for example:

<https://apac.antelopecloud.net/demo/main.aspx?slId=MPMBJNACIPIJPINGKKLXXXX>

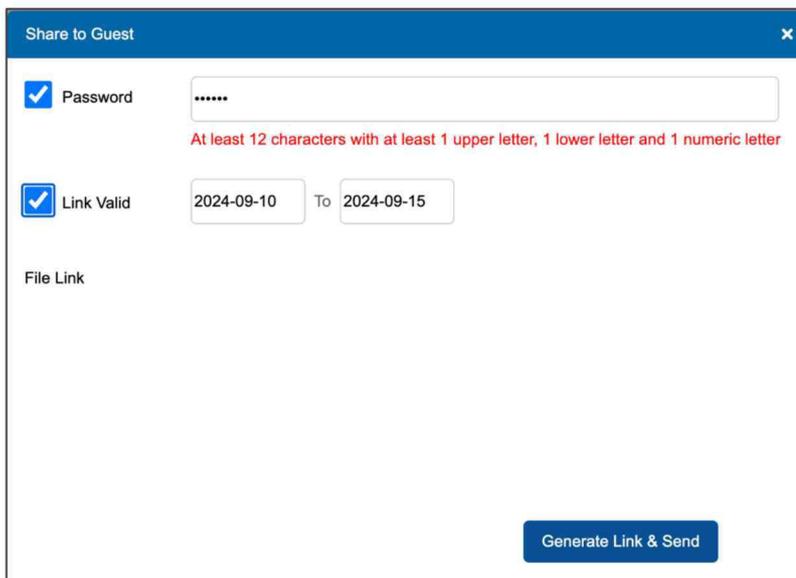
3. Bear in mind user account without access permission cannot access the document content even with the document link.

II. Share to Guest

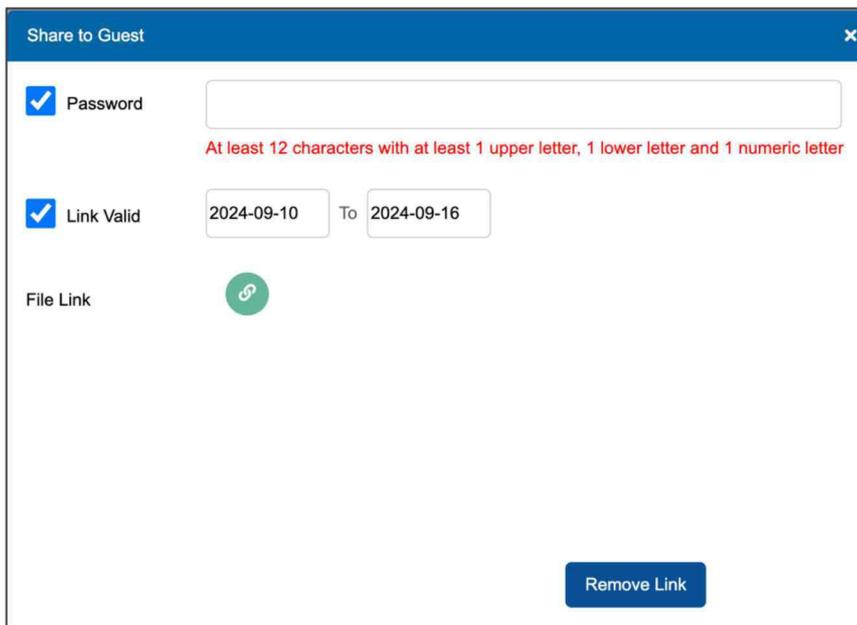
1. To share a document link to guest, select “Share To > Share to Guest”.



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.

A screenshot of the 'Share to Guest' dialog box. The title bar says 'Share to Guest'. There are two checked checkboxes: 'Password' and 'Link Valid'. The password field is empty, with a red error message below it: 'At least 12 characters with at least 1 upper letter, 1 lower letter and 1 numeric letter'. The 'Link Valid' section shows a date range from '2024-09-10' to '2024-09-15'. Below this is a 'File Link' label. At the bottom right, there is a blue button labeled 'Generate Link & Send'.

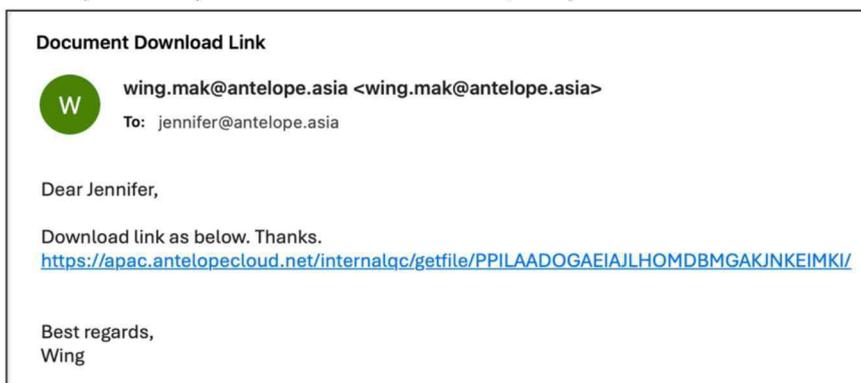
3. Once the document link is generated, you can copy the link by clicking the  icon.



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

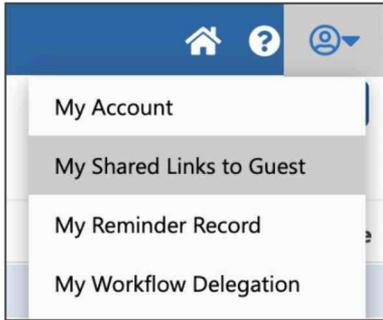
Noted: Unlike Share to Internal, the external share link to guest only shares the “current version” of document. In case there is a newer version of document published, you are required to generate a new share link again.

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”



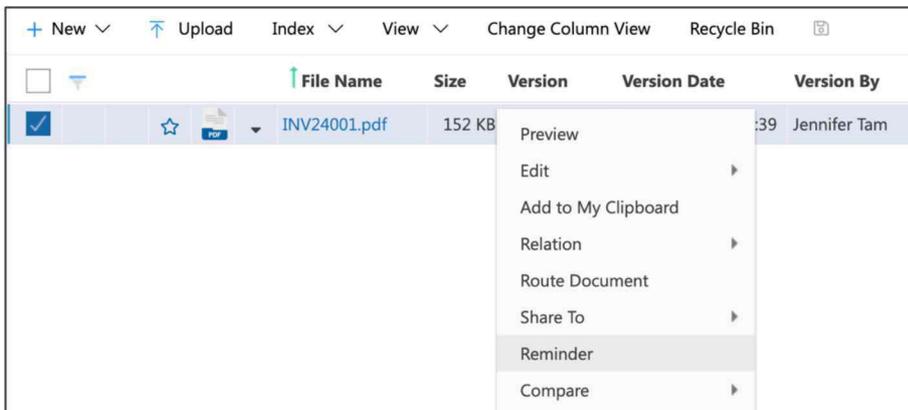
2. You can copy or remove the shared link at any time.

File Name	Folder Path	Shared Version	Link Created On	Set Password	Period From	Period To
PO-150001.pdf	Home\Samples\Accounting\Purchase Orders	1.0	2024-08-31	⊘		
INV24001.pdf	Home\Samples\Accounting\Invoice (2024)	1.0	2024-08-31	✔	2024-08-31	2024-09-06

R. Reminder

I. Create New Reminder

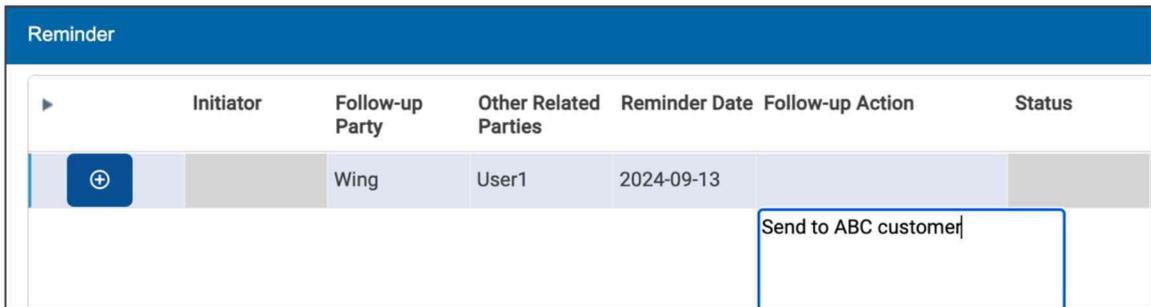
1. To create reminder schedule, select “Reminder” from the context menu.



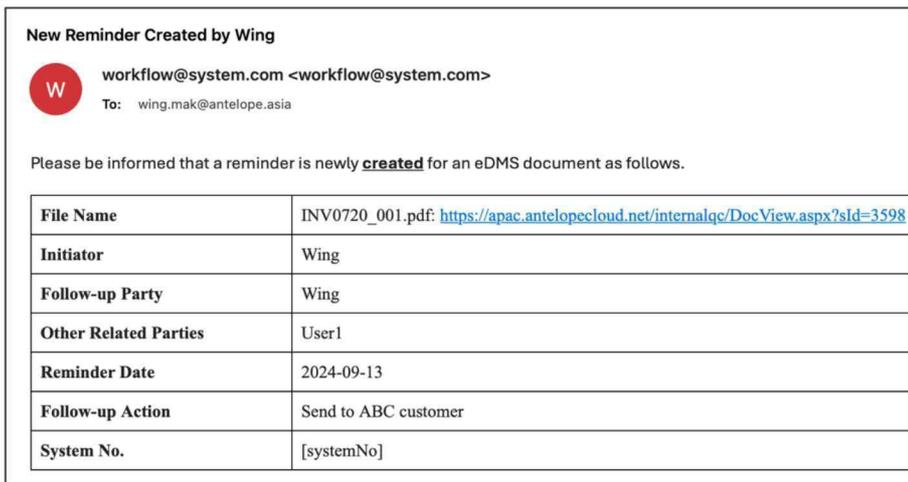
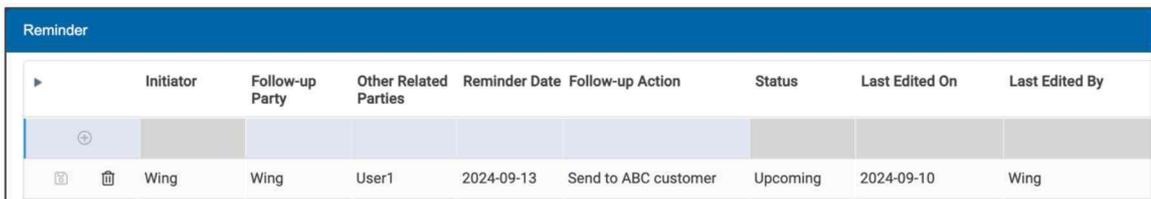
2. The Reminder window will appear.

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.

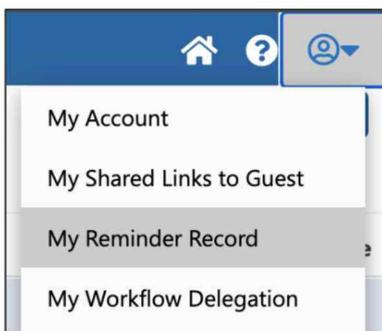


4. Click add icon to commit changes.
5. A new reminder record for the document is created. Both Wing and User1 will receive an email reminder on the selected date.



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.

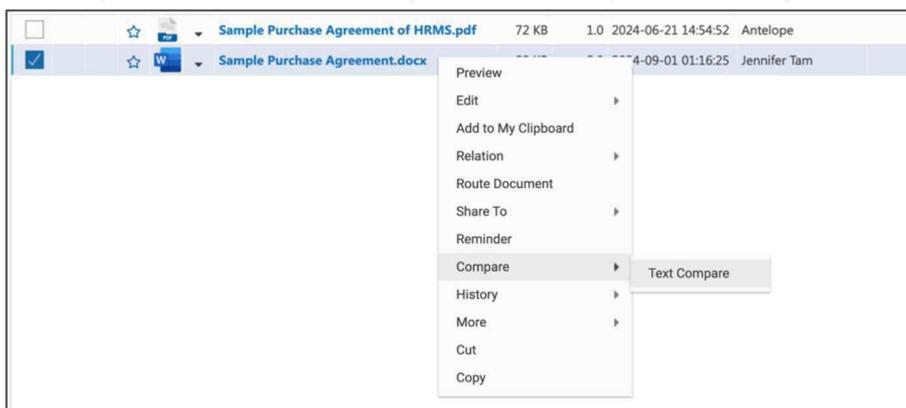
My Reminder Record										
	File Name	Folder Path	Initiator	Follow-up Party	Other Related Parties	Reminder Date	Follow-up Action	Status	Last Edited On	Last Edited By
	INV0720_001.pdf	Home\Accounting	Wing	Wing	User1	2024-09-13	Send to ABC customer	Upcoming	2024-09-10	Wing

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

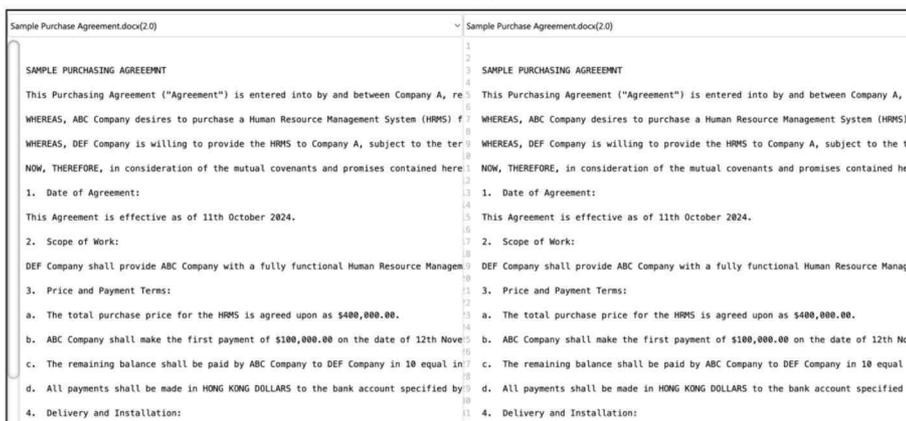
S. Compare

I. Text Compare

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



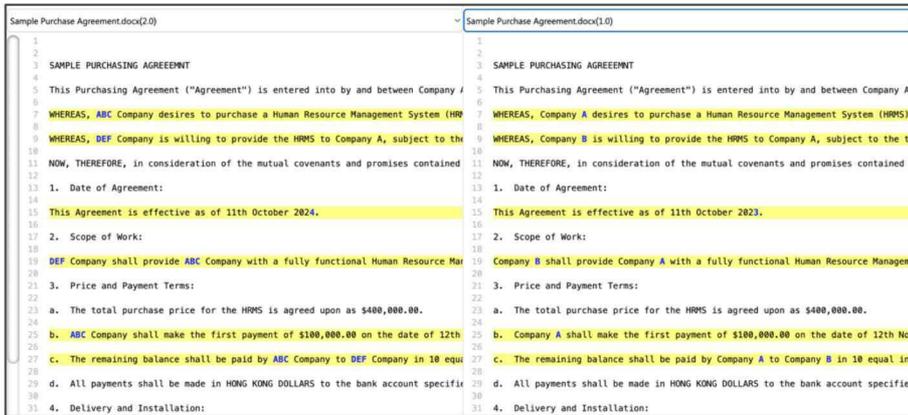
2. A two-sided document viewer will appear.



3. Select different versions on both sides.



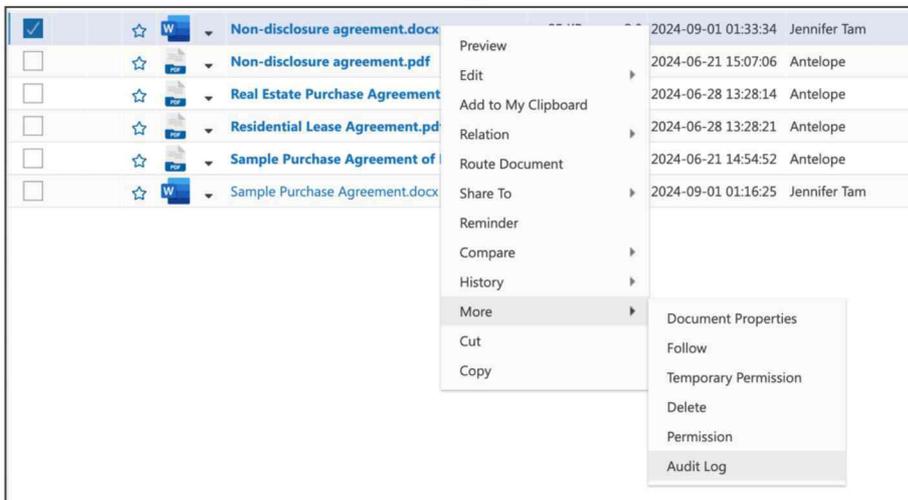
- 4. The documents will highlight for any difference between the two versions.



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.

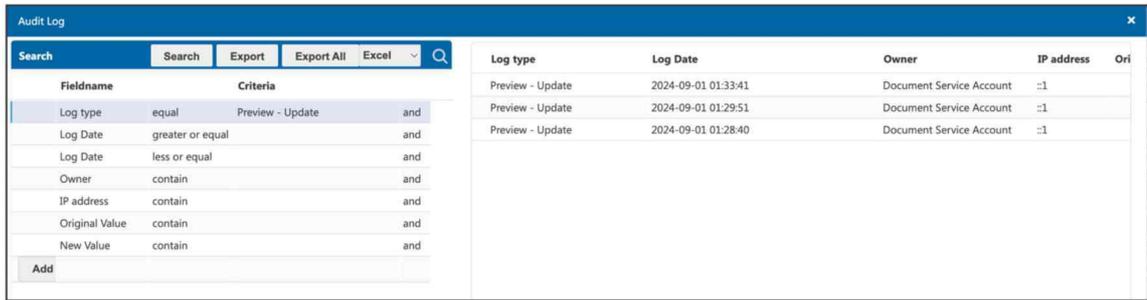
Log type	Log Date	Owner	IP address	Original Value	New Value
Document - Publish	2024-09-01 01:34:39	Jennifer Tam	172.31.5.29	Version=1.1	
Preview - Update	2024-09-01 01:33:41	Document Service Account	:1		Version=2.0
Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	:1		
Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	:1		
Document - Access Content	2024-09-01 01:33:37	Indexing Service Account	EC2AMAZ-JM0.		Version=1.1
Document - Access Content	2024-09-01 01:33:35	Document Service Account	:1		Version=1.1
Document - Check In	2024-09-01 01:33:35	Jennifer Tam	172.31.5.29	Version=1.1	Version=1.1
Document - Check Out	2024-09-01 01:33:34	Jennifer Tam	172.31.5.29	Version=1.0	
Document - Publish	2024-09-01 01:32:43	Jennifer Tam	172.31.5.29	Version=0.2	Version=1.0
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-JM0.		Version=0.2
Document - Access Content	2024-09-01 01:29:45	Document Service Account	:1		Version=0.2
Document - Check In	2024-09-01 01:29:43	Jennifer Tam	172.31.31.146	Version=0.2	Version=0.2
Document - Check Out	2024-09-01 01:29:43	Jennifer Tam	172.31.31.146	Version=0.1	
Preview - Update	2024-09-01 01:28:40	Document Service Account	:1		
Thumbnail - Update	2024-09-01 01:28:39	Document Service Account	:1		
Thumbnail - Update	2024-09-01 01:28:38	Document Service Account	:1		
Document - Access Content	2024-09-01 01:28:35	Indexing Service Account	EC2AMAZ-JM0.		Version=0.1
Document - Access Content	2024-09-01 01:28:34	Document Service Account	:1		Version=0.1
Document - 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.

Fieldname	Criteria	Log type	Log Date	Owner	IP address	Original Value	New Value
Log type	equal	Document - Publish	2024-09-01 01:34:39	Jennifer Tam	172.31.5.29	Version=1.1	
Log Date	greater or equal	Preview - Update	2024-09-01 01:33:41	Document Service Account	:1		Version=2.0
Log Date	less or equal	Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	:1		
Owner	contain	Thumbnail - Update	2024-09-01 01:33:40	Document Service Account	:1		
IP address	contain	Document - Access Content	2024-09-01 01:33:37	Indexing Service Account	EC2AMAZ-JM0.		Version=1.1
Original Value	contain	Document - Access Content	2024-09-01 01:33:35	Document Service Account	:1		Version=1.1
New Value	contain	Document - Check In	2024-09-01 01:33:35	Jennifer Tam	172.31.5.29	Version=1.1	Version=1.1
		Document - Check Out	2024-09-01 01:33:34	Jennifer Tam	172.31.5.29	Version=1.0	
		Document - Publish	2024-09-01 01:32:43	Jennifer Tam	172.31.5.29	Version=0.2	Version=1.0
		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-JM0.		Version=0.2

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.

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>