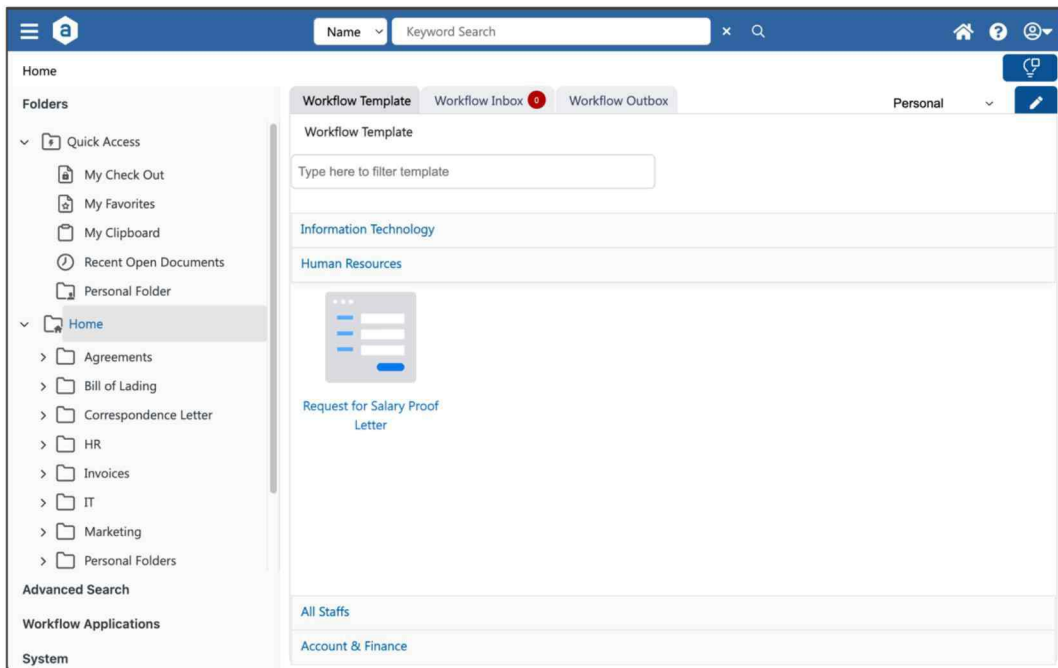


D. Searching

I. Name Search

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



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

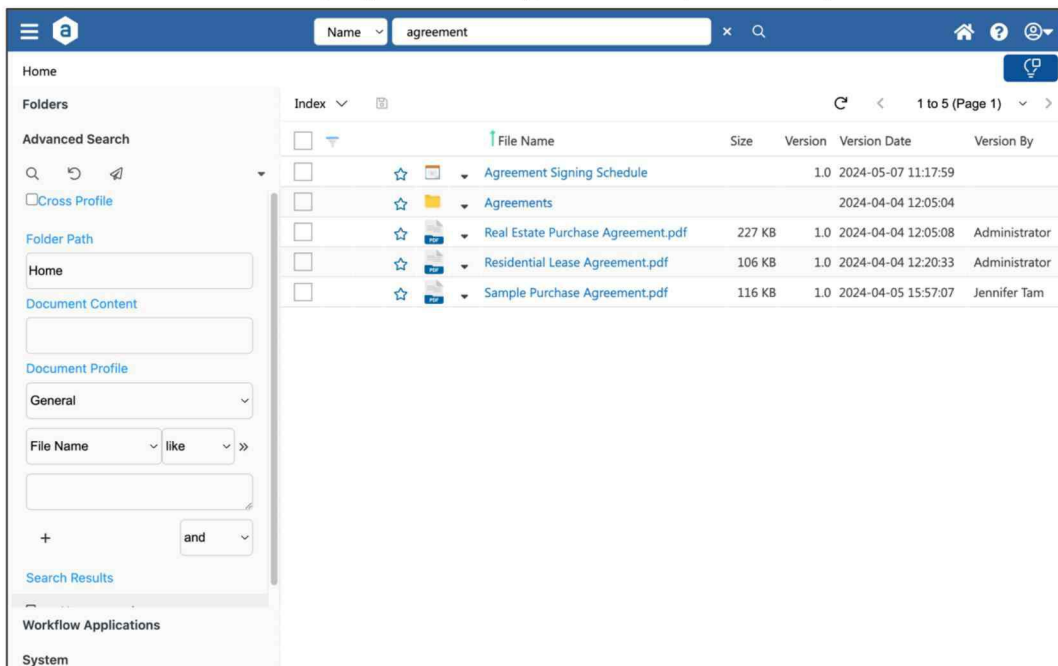


3. Input the search keyword (e.g. agreement).



4. Press “Enter” or click the search icon.

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



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

II. Full-Text Search

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

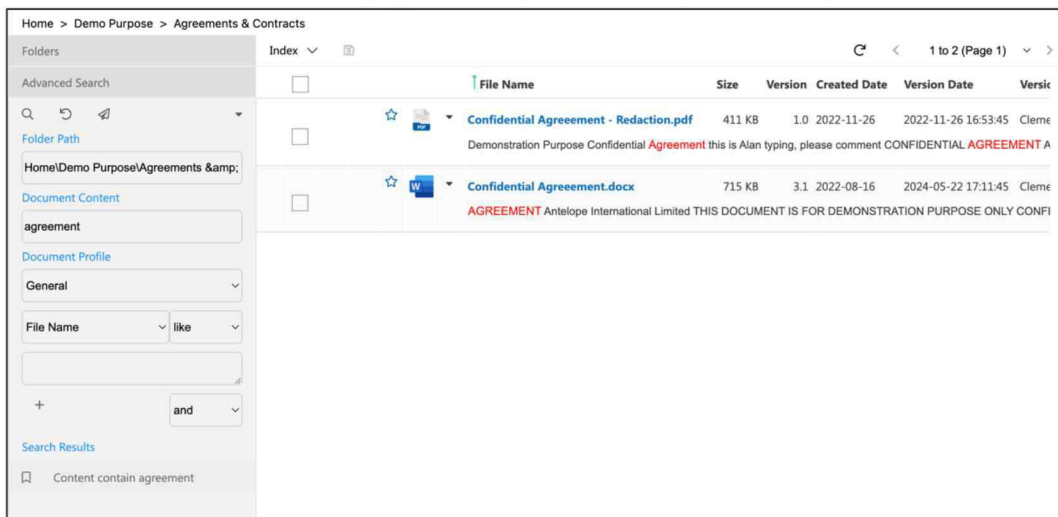


3. Input the search keyword (e.g. agreement).



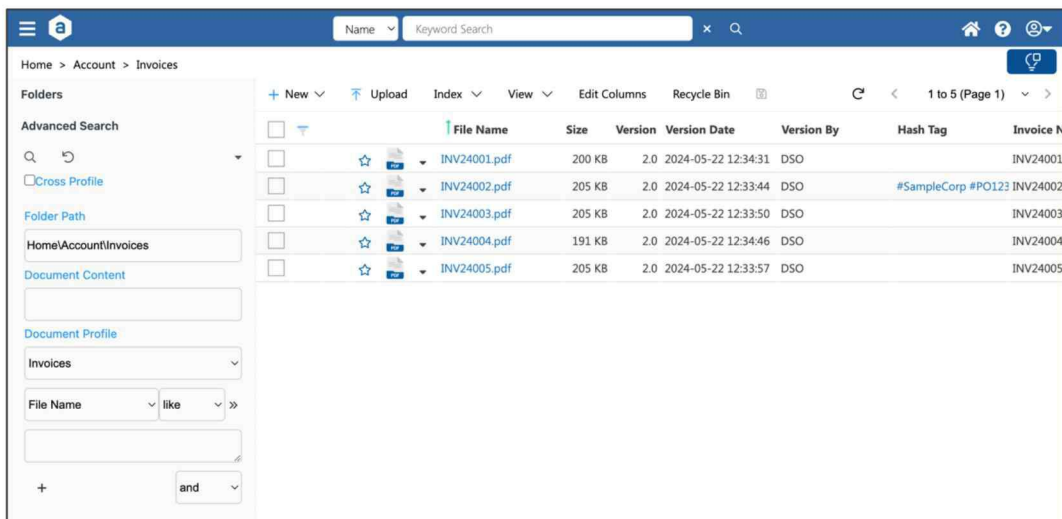
4. Press “Enter” or click the search icon.

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



III. Advanced Search

- 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.



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

Folder Path

Home\Account\Invoices

Document Content

Document Profile

Invoices

File Name like

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

Document Profile

Invoices

Invoice Date >=

2024-06-01

+ and

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

Document Profile

Invoices

Invoice Date >=

2024-06-01

— and

Invoice Date <=

2024-06-30

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

Advanced Search

Q ↺ ↻

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

Home > Account > Invoices

Advanced Search

Folder Path

Home\Account\Invoices

Document Content

Document Profile

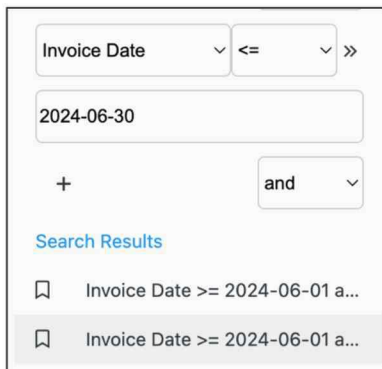
Invoices

Index

	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 "+" button and a dropdown menu showing "and".
- A link labeled "Search Results" in blue.
- A list of search results, each preceded by a flag icon (a small square with a diagonal line):
 - "Invoice Date >= 2024-06-01 a..."
 - "Invoice Date >= 2024-06-01 a..."

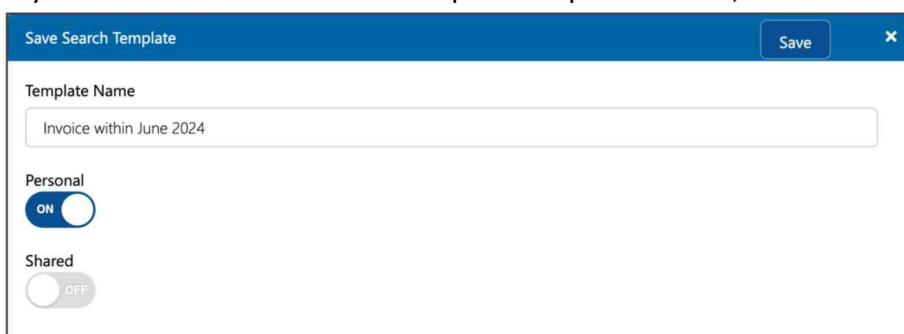
2. To save your search setting for future use, click the flag icon. 
3. The "Save Search Template" window will appear. Input a "Template Name" for your search template.



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 button (X).
- 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 button (X).
- 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.

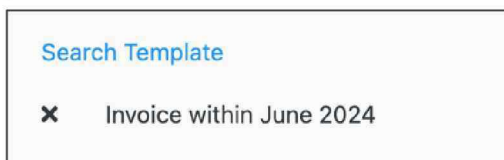


The dialog box titled "Save Search Template" has a blue header bar with a "Save" button and a close icon. It contains three sections: "Template Name" with a text input field containing "Invoice within June 2024"; "Personal" with a toggle switch set to "OFF"; and "Shared" with a toggle switch set to "ON". Below these is a "Folder Path" section with 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.

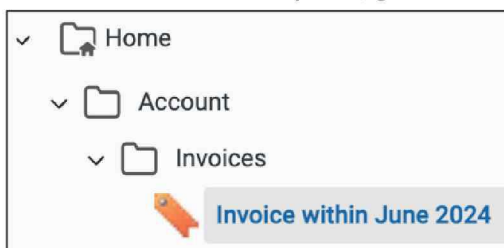
V. Load Search Template

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



The Advanced Search panel shows a "Search Template" section with a blue header. Below the header is a list item with a close icon (X) and the text "Invoice within June 2024".

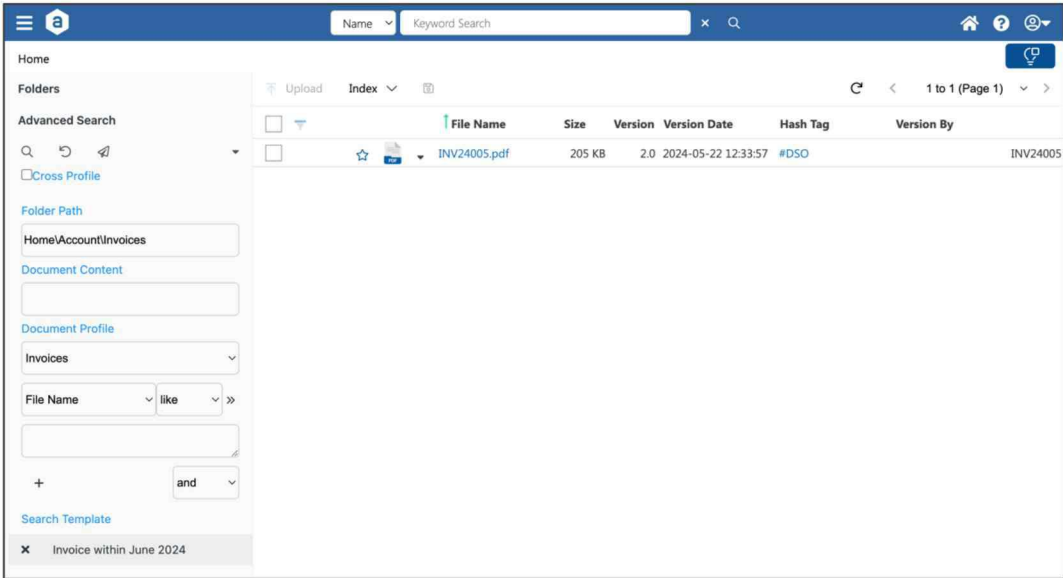
For shared search template, go to the folder that you saved the template.



The file explorer shows a tree view with the following structure: Home (expanded), Account (expanded), and Invoices (expanded). Below the tree view is a search bar with the text "Invoice within June 2024" and a magnifying glass icon.

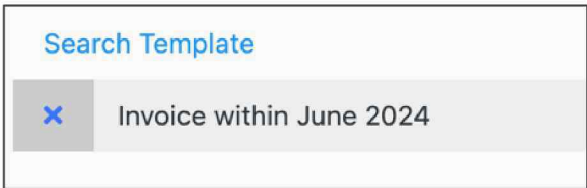
2. Click the template “Invoice within June 2024” to load your search template.

- 3. Antelope will perform the search result for you.

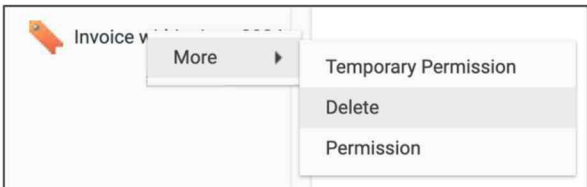


VI. Delete Search Template

- 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.